

# **EPC Release Notes**

13 — Last update: Oct 28, 2021

Interfacing Technologies Corporation

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# Release Notes 13

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The following major new enhancements and capabilities have been introduced in the 13 release.

**Warning when clicking on back button** | When a user is on edit mode in graph and clicks on the “back” button of the browser or “back/delete” on the keyboard, now a warning message appears to allow to confirm to continue or cancel the action.

# Disclaimer

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# WHATS NEW IN 13

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# Mass Update

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## Functionality

Editing and making changes to multiple objects on the LIST page just became incredibly easier for both modelers and system admins! This new option significantly increases productivity, enabling modelers to make multiple changes quickly & effortlessly.

## Customization

- Mass – Publish
- Mass – Edit Responsibilities
- Mass – Subscribe
- Mass – Unsubscribe
- Mass – Attributes
- Mass – Custom Attributes
- Mass – Edit
- Mass Delete
- Mass – Move
- Mass – Favorite
- Mass – Collaboration

## How it Works

To activate the mass options, users select one or more checkboxes. If users want to select all the checkboxes at once, this is possible by clicking on the checkbox on top, on the level of the tittles.

The screenshot shows the 'RISK' module interface. The top bar has a 'NEW' button and navigation icons. The left sidebar lists risk categories: '[fr] Risques de Compagnie', 'Customer Risks', 'Financial Risks', 'Loans' (selected), 'Human Resources Risks', 'Quality Risks', and 'Services Risks'. The main area is in 'LIST' view, showing a table of risk items. The table has columns for 'Name' and 'Type'. Four items are listed, each with a checkbox, a comment icon, a star icon, and a name. The checkboxes are highlighted with red boxes. The right sidebar shows a 'Filters' panel with a search bar and a list of filter options: 'Select Box', 'Graph', 'Favorite', 'Name', 'Type', 'Status', 'Modified Date', and 'Impact'. The 'Select Box' option is highlighted with a red box. Below the filters are buttons for 'Save Columns', 'Save Columns Environment Default', and 'Reset to Default'.

	Name	Type
<input checked="" type="checkbox"/>	Access to capital or liquidity	Risk
<input checked="" type="checkbox"/>	Accruals booked in wrong period	Risk
<input checked="" type="checkbox"/>	Incorrect data is registered in the loan Sub-L	Risk
<input checked="" type="checkbox"/>	Reversals not done or not done in time	Risk

Once the icons on top have been activated, they turn into a black color to indicate their availability. Users can now:



Click on button Collaboration to add collaborative tasks with colleagues.



favorite or unfavorite objects in the list.



in LIST page of a module, click on the three-dots icon to expand the menu with all the Mass options. There users can publish, edit responsibilities, subscribe, unsubscribe, edit custom attributes, edit, delete and move multiple object.

- Publish
- Edit Responsibilities
- Subscribe
- Unsubscribe
- Custom Attributes
- Edit
- Delete
- Move

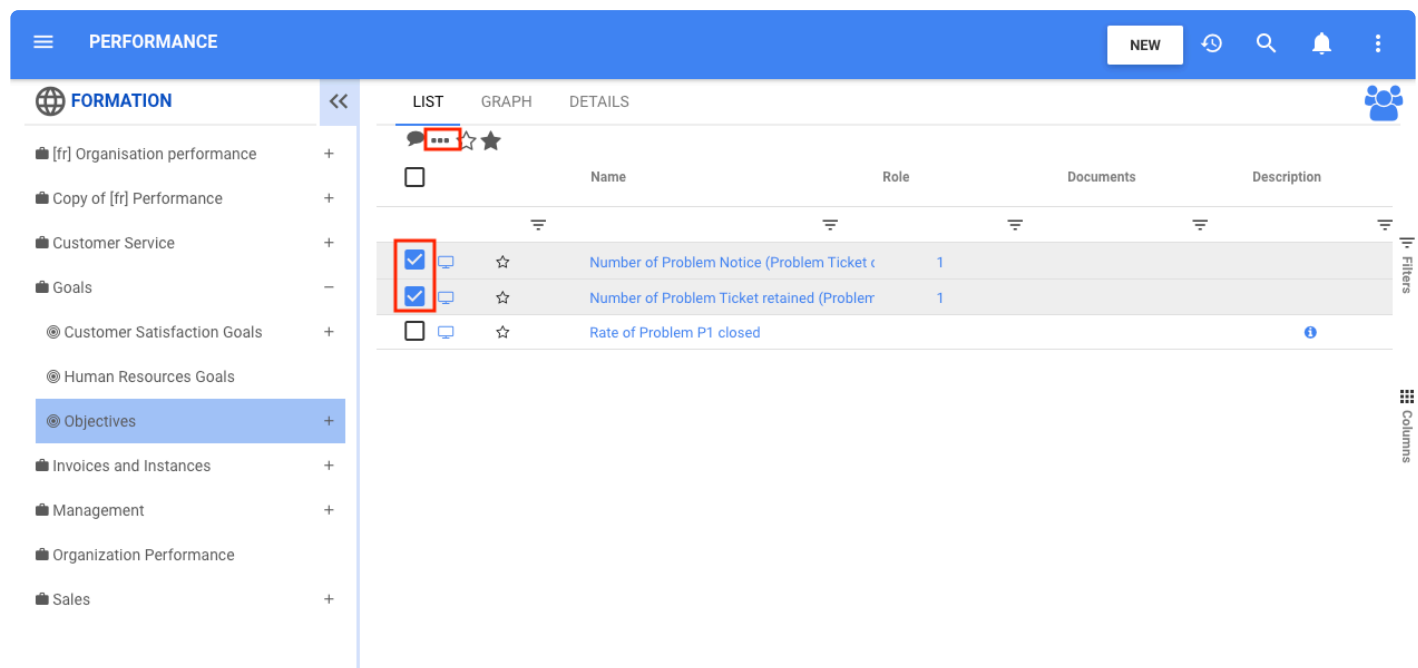
# Mass-Publish

## Functionality

The Mass – Publish feature allows modelers to publish several objects at once. This new option facilitates the work of modelers by reducing the time needed to publish various objects. Now, the objects can be selected in LIST page and then published.

## How it Works

To use this feature, users go to List View, selects the check boxes of the objects to be publish. Then the three dots is activated.

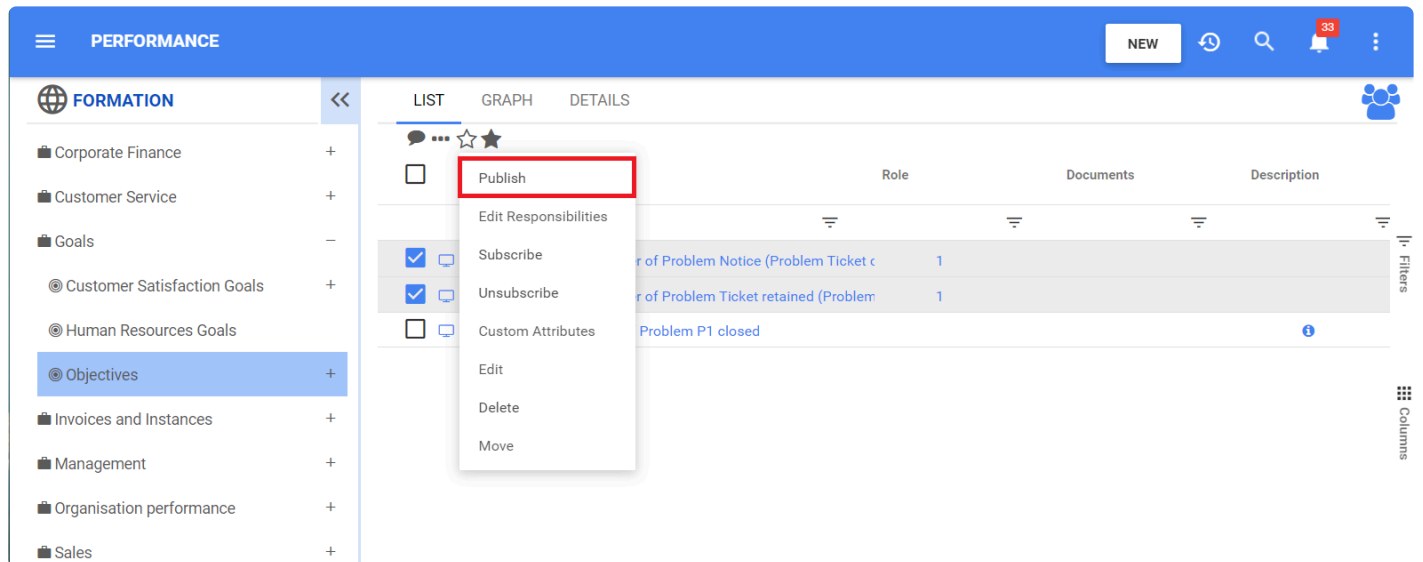


The screenshot displays the 'PERFORMANCE' application interface. On the left is a sidebar with a tree view under 'FORMATION', including items like 'Organisation performance', 'Copy of [fr] Performance', 'Customer Service', 'Goals', 'Customer Satisfaction Goals', 'Human Resources Goals', 'Objectives' (selected), 'Invoices and Instances', 'Management', 'Organization Performance', and 'Sales'. The main area is titled 'LIST' and contains a table with columns: Name, Role, Documents, and Description. The table has three rows:

	Name	Role	Documents	Description
<input checked="" type="checkbox"/>	Number of Problem Notice (Problem Ticket c	1		
<input checked="" type="checkbox"/>	Number of Problem Ticket retained (Problem	1		
<input type="checkbox"/>	Rate of Problem P1 closed			

At the top of the table, there is a row of action icons: a speech bubble, a three-dot menu (highlighted with a red box), a star, and a trash can. The dropdown menu for the three-dot icon is open, showing a 'publish' option (highlighted with a red box) and a 'delete' option.

Click on **publish** from the dropdown menu.



When users click on publish, a publish confirmation window opens, where users can add a comment and choose whether to publish the objects as minor or major.

Once users have added a comment and set the publication type, they can click the **Publish** button and all objects will be published with the same characteristics.

## Publish Confirmation

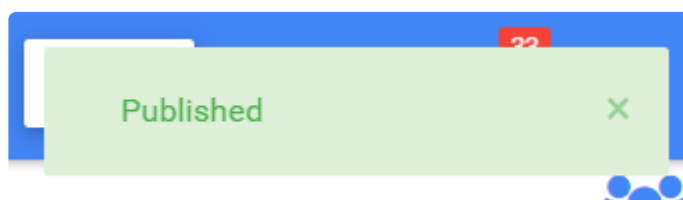
Comment

☒ Major ☐ Minor

Cancel

Publish

After the objects have been published a confirmation message appears





# Mass-Edit Responsibilities

## Functionality

The Mass – Edit responsibilities feature allows modelers to edit assets, org units, resources and roles of several objects at once. This new option facilitates the work of modelers by reducing the time needed to make changes on the responsibilities on various objects. Now, the objects can be selected in LIST page and then edit its responsibilities.

## How it works

The user selects the objects to edit

The screenshot shows the 'PERFORMANCE' section with a 'LIST' view. The left sidebar shows a tree structure under 'FORMATION', with 'Objectives' selected. The main table has the following data:

	Name	Role	Documents	Description
<input checked="" type="checkbox"/>	Number of Problem Notice (Problem Ticket c	1		
<input checked="" type="checkbox"/>	Number of Problem Ticket retained (Problem	1		
<input type="checkbox"/>	Rate of Problem P1 closed			

Then after clicking on the three-dots icon, the extended list appears with the option Edit Responsibilities.

The screenshot shows the PERFORMANCE dashboard with a sidebar menu on the left containing categories like Corporate Finance, Customer Service, Goals, Objectives, Invoices and Instances, Management, Organisation performance, and Sales. The main area displays a table with columns for Role, Documents, and Description. A context menu is open over the table, with 'Edit Responsibilities' highlighted in red. Other menu options include Publish, Subscribe, Unsubscribe, Custom Attributes, Edit, Delete, and Move.

When clicking the on Edit Responsibilities, users can select the type of responsibility there are looking for.

The 'Edit Responsibilities' dialog box is shown. It has a title bar with a close button. Inside, there's a section 'Select a Role, Organization Unit, Asset or Resource' with a dropdown menu 'FILTER TYPE' showing 'Sel. All' and 'Desel. all'. Below this, a list of filter types is shown: ASSET, ORG UNIT, RESOURCE, and ROLE. The 'ASSET' option is highlighted with a red box. To the right, there's a text input field 'Type Responsibility Name' and a button with a user icon. At the bottom right, there's a 'Done' button.

Select the asset, org unit, resource or role and the its respective RASCI.

**Edit Responsibilities**

Select a Role, Organization Unit, Asset or Resource

FILTER TYPE ▼

Type Responsibility Name

Roles

Client (LMC)

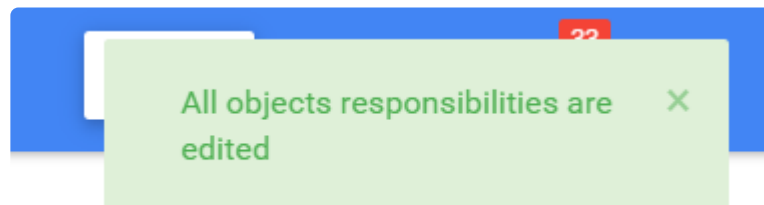
Number of Problem Notice (Problem Ticket created) created in a period

Number of Problem Ticket retained (Problem Ticket qualified) in a period

R  
A  
SU  
C  
I  
V  
SI

Done

Users clicks on Done to save the changes, then after the object have been edited a confirmation message appears



# Mass-Subscribe/ Unsubscribe

## Functionality

The Mass – subscribe and unsubscribe features allows modelers to easily select various objects in LIST page to subscribe or unsubscribe of them at once. This new option reduces the time needed to make this changes.

## How it Works

To use this feature, users select the object to which they want to subscribe or unsubscribe from list view. Once they have selected the item, the three dot icon activates.

The screenshot shows the PERFORMANCE LIST view. The left sidebar contains a tree view with 'FORMATION' expanded. The main area displays a table with columns: Name, Role, Documents, and Description. The table has three rows. The first two rows are highlighted with a red box around the three-dot menu icon, indicating the mass action feature.

	Name	Role	Documents	Description
<input checked="" type="checkbox"/>	Number of Problem Notice (Problem Ticket c	1		
<input checked="" type="checkbox"/>	Number of Problem Ticket retained (Problem	1		
<input type="checkbox"/>	Rate of Problem P1 closed			

Users click on the icon and a list appears with the option to subscribe and unsubscribe.

**PERFORMANCE**

**FORMATION**

Corporate Finance +  
Customer Service +  
Goals -  
Customer Satisfaction Goals +  
Human Resources Goals +  
**Objectives +**  
Invoices and Instances +  
Management +  
Organisation performance +  
Sales +

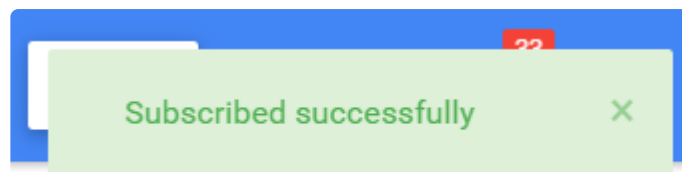
**LIST** GRAPH DETAILS

Publish  
Edit Responsibilities  
**Subscribe**  
**Unsubscribe**  
Custom Attributes  
Edit  
Delete  
Move

	Role	Documents	Description
<input checked="" type="checkbox"/>			of Problem Notice (Problem Ticket c 1
<input checked="" type="checkbox"/>			of Problem Ticket retained (Problem 1
<input type="checkbox"/>			Problem P1 closed

Filters  
Columns

The subscription or unsubscription is confirm by a message on the top right of the page.



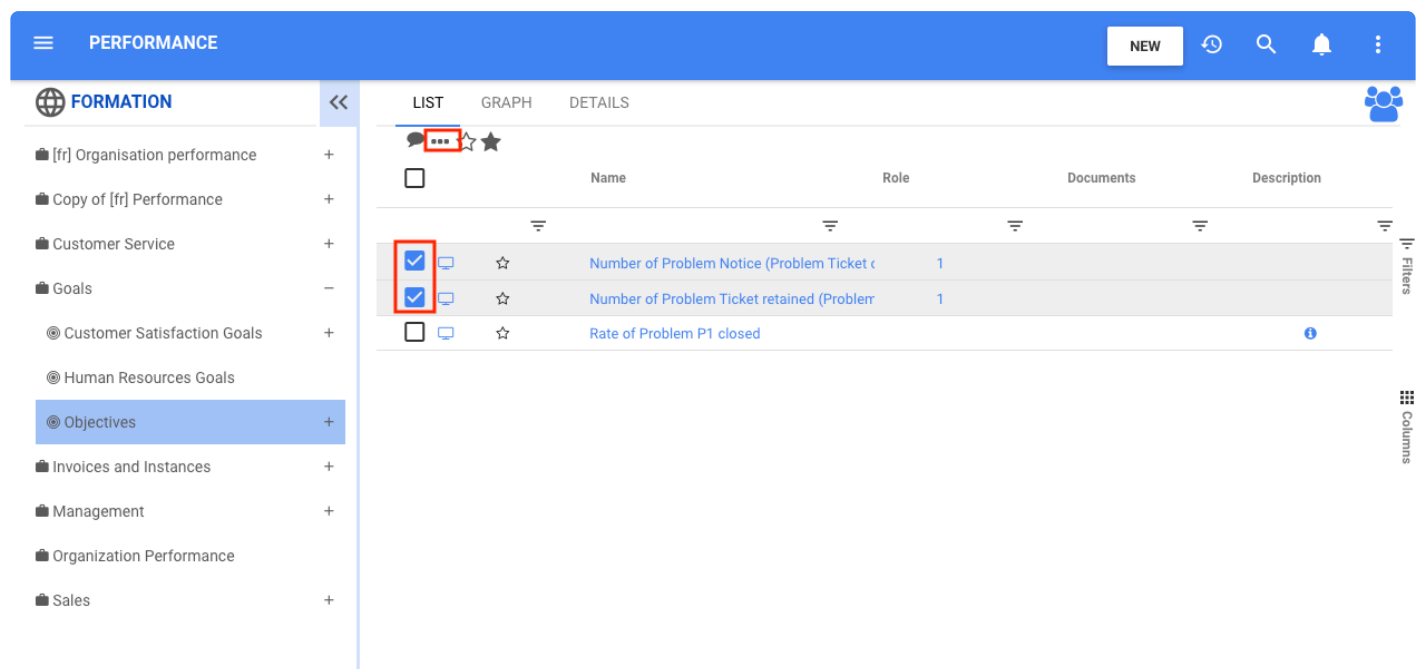
# Mass-Custom Attributes

## Functionality

The Mass – Custom attributes feature allows modelers to edit the attributes of several objects at once. This new option facilitates the work of modelers by reducing the time needed to edit the attributes of various objects. Now, the objects can be selected in LIST page and then edited.

## How it works

To use this feature, users select the objects to edit by checking the checkboxes of the object to edit.



The screenshot displays the 'PERFORMANCE' application interface. On the left is a sidebar with a 'FORMATION' menu and a list of categories including 'Organisation performance', 'Performance', 'Customer Service', 'Goals', 'Customer Satisfaction Goals', 'Human Resources Goals', 'Objectives' (highlighted), 'Invoices and Instances', 'Management', 'Organization Performance', and 'Sales'. The main area shows a 'LIST' view of a table with columns: Name, Role, Documents, and Description. The table contains three rows of attributes. The first two rows are highlighted in grey and have their checkboxes selected (checked). The third row is not highlighted and has its checkbox unchecked. A red box highlights the three-dots menu icon in the top left of the table, and another red box highlights the checkboxes of the first two rows. The table data is as follows:

	Name	Role	Documents	Description
<input checked="" type="checkbox"/>	Number of Problem Notice (Problem Ticket c	1		
<input checked="" type="checkbox"/>	Number of Problem Ticket retained (Problem	1		
<input type="checkbox"/>	Rate of Problem P1 closed			

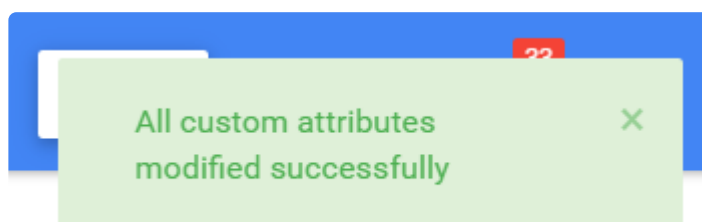
Then after clicking on the three-dots button, the extended list appears with the option Custom Attributes.

The screenshot shows the PERFORMANCE dashboard. On the left is the FORMATION sidebar with categories like Corporate Finance, Customer Service, Goals, and Objectives. The main area displays a table with columns: Role, Documents, and Description. A context menu is open over the table, listing options: Publish, Edit Responsibilities, Subscribe, Unsubscribe, Custom Attributes (highlighted with a red box), Edit, Delete, and Move.

Then the Custom Attributes form opens.

The Custom Attributes form is displayed. It has a 'Save & Close' button in the top right. The form is divided into two main sections: 'What are the Attributes?' and 'Value'. The 'What are the Attributes?' section lists attributes: Average Video Cost, Business Priority, Channel, Data Sensitivity, Inventory Description, Project Assessment Status, Production Stage, Rich Text, and PubM1 m. The 'Value' section shows the corresponding values for each attribute, such as 'USD United States dollar' for Average Video Cost and 'SELECT ONE VALUE' for Business Priority. A rich text editor is visible for the 'Inventory Description' attribute.

Once the user has modified the attributes and Save & Close the changes, a **confirmation notification** will appear to confirm that the objects have been modified successfully



# Mass-Edit

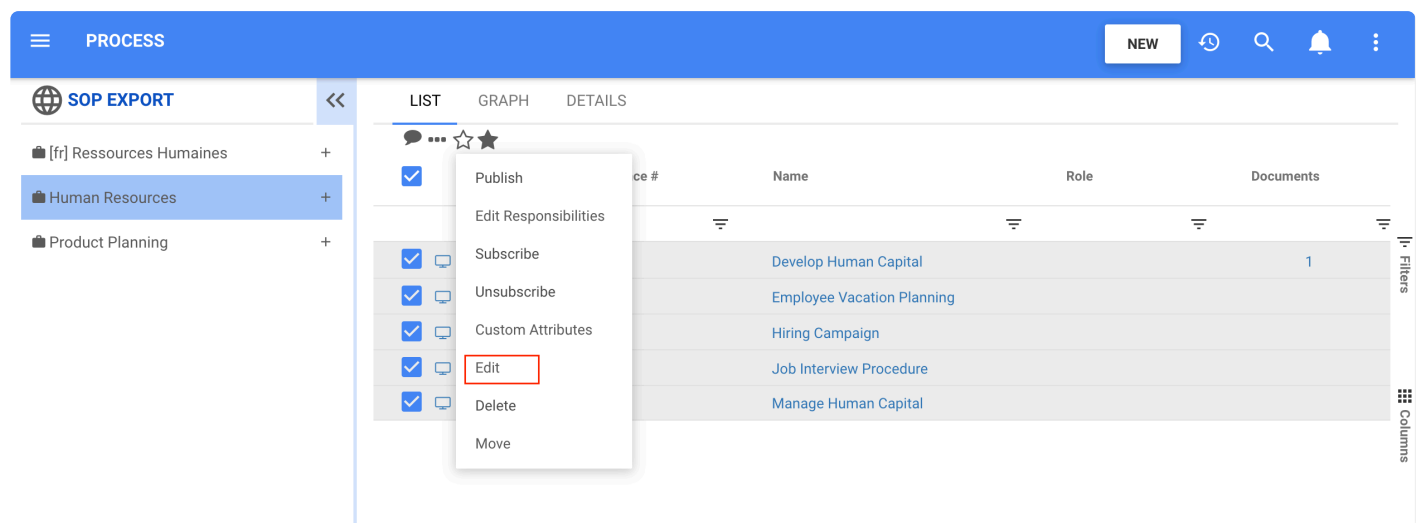
## Functionality

The Mass – Edit feature allows modelers to edit the Properties and General Information of several objects at once. This new option facilitates the work of modelers by reducing the time needed to edit various objects. Now, the objects can be selected in LIST page and then edited.

This addition offers two tabs for edition, GENERAL tab allows to edit the Documents, Performance, Rules, Risks, Control and Master Data of the objects. PROPERTIES tab, allows to edit different properties depending on the object being edited, such as: Categories, Risks, etc.

## How it works

To use these feature, users check on the checkbox of the objects to be edit and then click on the three-dots on top to see the extended list and click on edit



There, users see the GENERAL and PROPERTIES tab to edit



Edit Objects

GENERAL

PROPERTIES

Save & Close

Which Documents are used?	+
How is Performance measured?	+
Which Business Rules are applicable?	+
Which Risks are applicable?	+
Which Controls are applicable?	+
Which Master Data are used?	+

Cancel

Save & Close

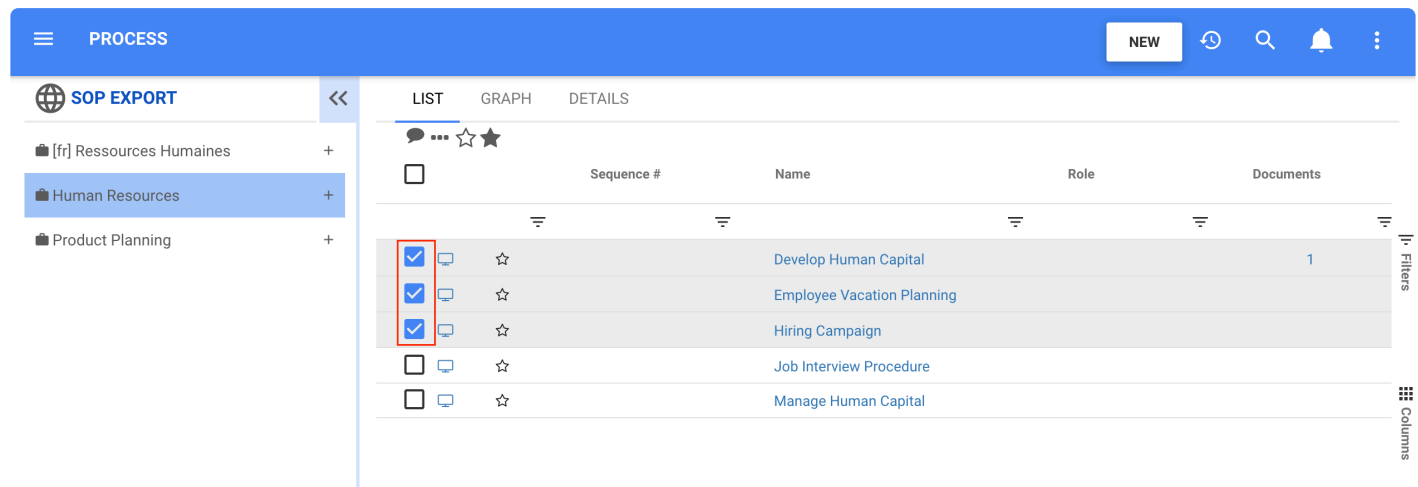
# Multi-Edit – Document Selection

## Functionality

The Multi-Edit feature allows modelers to select the documents that are applicable to one or more objects through a single interaction. This new option facilitates the work of modelers by reducing the time needed to make changes on the pertinent documents to various objects. Now, the objects can be selected in LIST page and then the documents that are applicable to them through a single interaction. This feature is found in all modules.

## How it works

To use this feature, users simply have to select the objects to edit the categories by marking the check boxes and then click on the three-dots at the top.

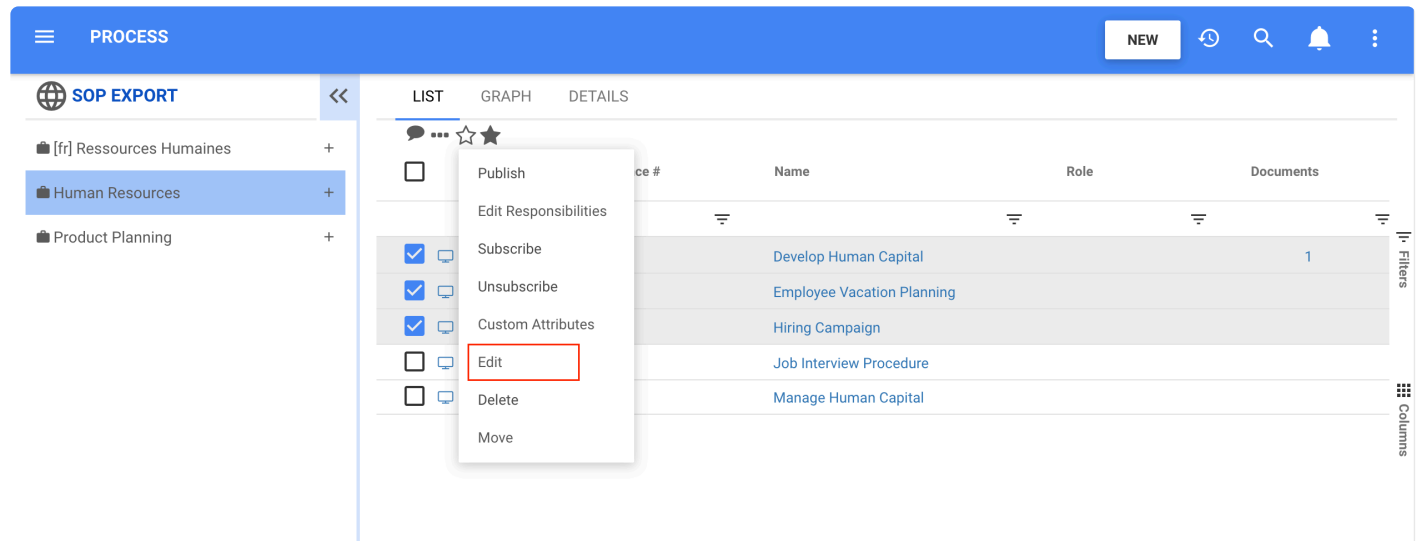


The screenshot shows the EPC interface with the 'PROCESS' tab selected. The 'SOP EXPORT' module is active, and the 'LIST' view is displayed. The table shows the following documents:

Sequence #	Name	Role	Documents
1	Develop Human Capital		1
2	Employee Vacation Planning		
3	Hiring Campaign		
4	Job Interview Procedure		
5	Manage Human Capital		

The first three rows are selected, and the 'Edit' option is highlighted in the top bar.

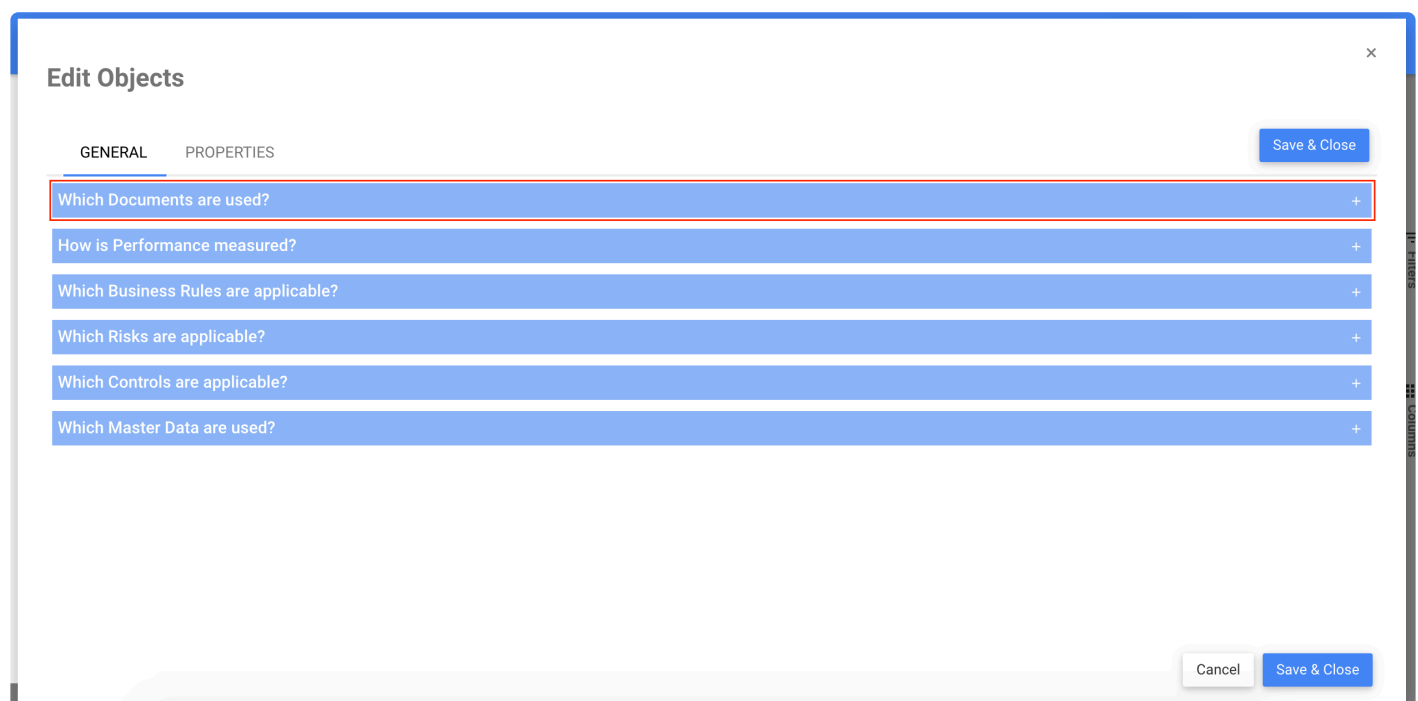
When the drop down list appears, select **Edit**



The screenshot shows the 'PROCESS' application interface. On the left, there is a sidebar with a tree view containing 'SOP EXPORT', '[fr] Ressources Humaines', 'Human Resources', and 'Product Planning'. The main area displays a table with columns: 'Process #', 'Name', 'Role', and 'Documents'. A context menu is open over the table, showing options: 'Publish', 'Edit Responsibilities', 'Subscribe', 'Unsubscribe', 'Custom Attributes', 'Edit' (highlighted with a red box), 'Delete', and 'Move'. The table data includes:

Process #	Name	Role	Documents
	Develop Human Capital		1
	Employee Vacation Planning		
	Hiring Campaign		
	Job Interview Procedure		
	Manage Human Capital		

Then expand **“Which Documents are used?”** and make the respective changes.



The screenshot shows the 'Edit Objects' dialog box. It has two tabs: 'GENERAL' and 'PROPERTIES'. The 'GENERAL' tab is selected. The dialog lists several fields for editing, each with a plus icon on the right. The first field, 'Which Documents are used?', is highlighted with a red box. The other fields are:

- How is Performance measured?
- Which Business Rules are applicable?
- Which Risks are applicable?
- Which Controls are applicable?
- Which Master Data are used?

At the bottom right, there are 'Cancel' and 'Save & Close' buttons.

# Multi-Edit – Performance

## Functionality

The Multi-Edit feature allows modelers to select the Objectives KPI,KCI,KRI that are applicable to one or more objects through a single interaction. This new option facilitates the work of modelers by reducing the time needed to make changes on the pertinent performance measures to various objects. Now, the objects can be selected in the LIST page and then the respective measures that are applicable to them through a single interaction. This option is found in Capability and Process module.

## How it works

To use this feature, users must navigate to the list view of a module Process or Capability which allows Performance associations. Check one or many object types using the Select Box.

	Sequence #	Name	Role	Documents
<input checked="" type="checkbox"/>		Develop Human Capital		1
<input checked="" type="checkbox"/>		Employee Vacation Planning		
<input checked="" type="checkbox"/>		Hiring Campaign		
<input type="checkbox"/>		Job Interview Procedure		
<input type="checkbox"/>		Manage Human Capital		

Next, click on the three-dot icon on the page header. When the extended list appears, select **Edit**

The screenshot shows the 'PROCESS' application interface. On the left, there is a sidebar with a 'SOP EXPORT' button and a list of categories: '[fr] Ressources Humaines', 'Human Resources', and 'Product Planning'. The main area displays a 'LIST' view of processes. A context menu is open over the list, showing options: 'Publish', 'Edit Responsibilities', 'Subscribe', 'Unsubscribe', 'Custom Attributes', 'Edit' (highlighted with a red box), 'Delete', and 'Move'. The list contains several processes, including 'Develop Human Capital', 'Employee Vacation Planning', 'Hiring Campaign', 'Job Interview Procedure', and 'Manage Human Capital'.

The option **“How is Performance measured?”** now appears. There the user can make the changes on Performance for the selected objects.

The screenshot shows the 'Edit Objects' dialog box. It has two tabs: 'GENERAL' and 'PROPERTIES'. The 'GENERAL' tab is active, showing a list of questions with expandable sections (indicated by '+' signs). The questions are: 'Which Documents are used?', 'How is Performance measured?' (highlighted with a red box), 'Which Business Rules are applicable?', 'Which Risks are applicable?', 'Which Controls are applicable?', and 'Which Master Data are used?'. At the top right, there is a 'Save & Close' button. At the bottom right, there are 'Cancel' and 'Save & Close' buttons.

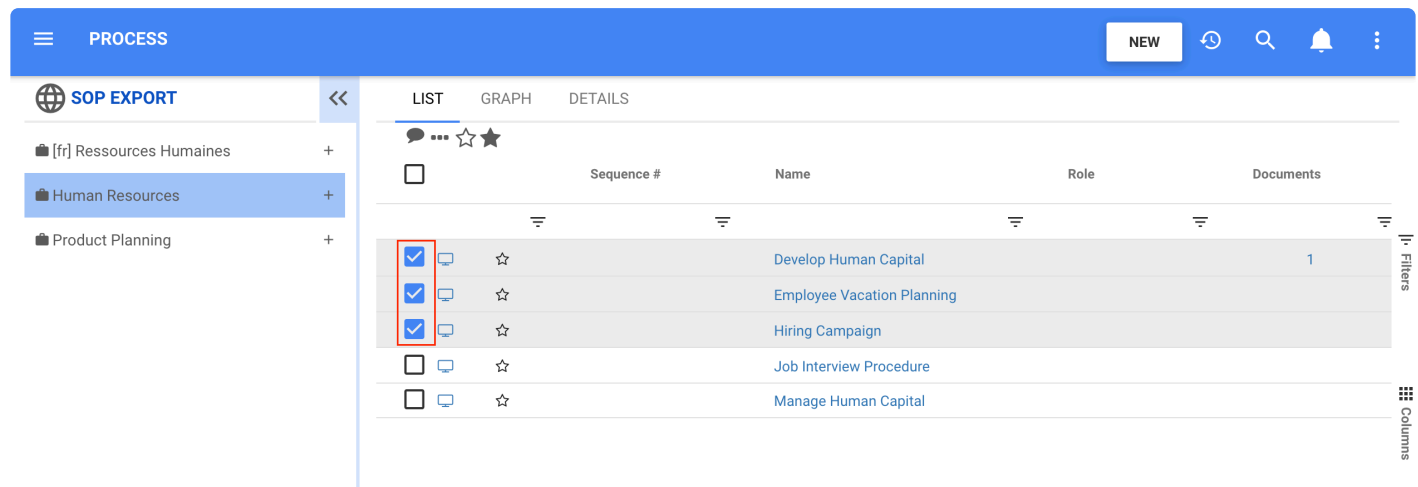
# Multi- Edit – Rule Selection

## Functionality

The Multi-Edit feature allows modelers to select the rules that are applicable to one or more objects through a single interaction. This new option facilitates the work of modelers by reducing the time needed to make changes on the pertinent rules related to various objects. Now, the objects can be selected in LIST page and then the respective rules that are applicable to them through a single interaction. This option is found in Process, Organization, control and Capability module.

## How it works

To use this feature, users have to select the objects to edit by marking the check boxes, then Click on the three-dots on the top.



The screenshot shows the EPC interface with the 'PROCESS' module selected. The left sidebar shows a tree view with 'SOP EXPORT' and 'Human Resources' selected. The main area displays a table of rules. The first three rows are selected, and the 'Edit' option is highlighted in the top action bar.

Sequence #	Name	Role	Documents
	Develop Human Capital		1
	Employee Vacation Planning		
	Hiring Campaign		
	Job Interview Procedure		
	Manage Human Capital		

When the drop down list appears select Edit

The screenshot shows the 'PROCESS' application interface. On the left, there is a sidebar with a 'SOP EXPORT' menu. The main area displays a list of business rules under the 'LIST' tab. A context menu is open over the list, showing options: Publish, Edit Responsibilities, Subscribe, Unsubscribe, Custom Attributes, Edit (highlighted with a red box), Delete, and Move. The list of business rules includes: Develop Human Capital, Employee Vacation Planning, Hiring Campaign, Job Interview Procedure, and Manage Human Capital.

Process #	Name	Role	Documents
	Develop Human Capital		1
	Employee Vacation Planning		
	Hiring Campaign		
	Job Interview Procedure		
	Manage Human Capital		

Next, expand **“Which Business Rules are applicable?”**

The screenshot shows the 'Edit Objects' dialog box. It has two tabs: 'GENERAL' and 'PROPERTIES'. The 'GENERAL' tab is active, showing a list of business rules. The rule 'Which Business Rules are applicable?' is highlighted with a red box. The dialog box also includes 'Save & Close' and 'Cancel' buttons.

Business Rule
Which Documents are used?
How is Performance measured?
Which Business Rules are applicable?
Which Risks are applicable?
Which Controls are applicable?
Which Master Data are used?

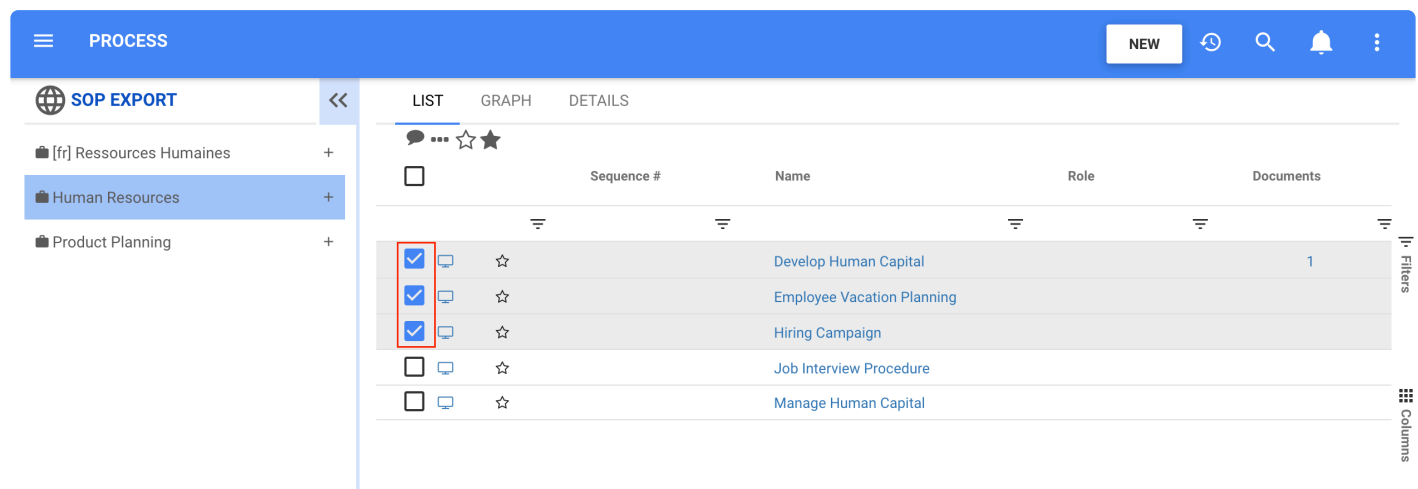
# Multi-Edit – Risk

## Functionality

The Multi-Edit Risk selection feature allows modelers to select the risks that are applicable to one or more objects through a single interaction. This new option facilitates the work of modelers by reducing the time needed to make changes on the pertinent risks related to various objects. Now, the objects can be selected in LIST page and then the respective risks that are applicable to them through a single interaction. Users can select Risk associations in Process, Performance, Organization, Risk, Rules and Capability modules.

## How it works

To use this feature, users select the objects to edit the categories by marking the check boxes, then click on the 3 dots at the top.



The screenshot shows the EPC interface with the 'PROCESS' module selected. The left sidebar shows a tree view with 'SOP EXPORT' and 'Human Resources' selected. The main table displays a list of risks with columns for Sequence #, Name, Role, and Documents. The first three rows are highlighted, and their checkboxes are checked. A red box highlights the first three rows' checkboxes.

	Sequence #	Name	Role	Documents
<input checked="" type="checkbox"/>		Develop Human Capital		1
<input checked="" type="checkbox"/>		Employee Vacation Planning		
<input checked="" type="checkbox"/>		Hiring Campaign		
<input type="checkbox"/>		Job Interview Procedure		
<input type="checkbox"/>		Manage Human Capital		

When the drop down list appears select **Edit**



The screenshot shows the 'PROCESS' application interface. On the left, there is a sidebar with a 'SOP EXPORT' button and a list of categories: '[fr] Ressources Humaines', 'Human Resources', and 'Product Planning'. The main area displays a list of processes under the 'LIST' tab. A context menu is open over the list, showing options: Publish, Edit Responsibilities, Subscribe, Unsubscribe, Custom Attributes, Edit (highlighted with a red box), Delete, and Move. The list of processes includes: Develop Human Capital, Employee Vacation Planning, Hiring Campaign, Job Interview Procedure, and Manage Human Capital.

Process #	Name	Role	Documents
	Develop Human Capital		1
	Employee Vacation Planning		
	Hiring Campaign		
	Job Interview Procedure		
	Manage Human Capital		

Then expand **“Which Risk are applicable?”**. Users can make the changes on risks for the selected objects.

The screenshot shows the 'Edit Objects' dialog box. It has two tabs: 'GENERAL' and 'PROPERTIES'. The 'GENERAL' tab is active, displaying a list of questions. The question 'Which Risks are applicable?' is highlighted with a red box. The other questions are: 'Which Documents are used?', 'How is Performance measured?', 'Which Business Rules are applicable?', 'Which Controls are applicable?', and 'Which Master Data are used?'. There are 'Save & Close' buttons at the top right and bottom right, and a 'Cancel' button at the bottom right.

Question	Action
Which Documents are used?	+
How is Performance measured?	+
Which Business Rules are applicable?	+
Which Risks are applicable?	+
Which Controls are applicable?	+
Which Master Data are used?	+

# Multi-Edit – Controls

## Functionality

The Multi-Edit Control feature will allow users to select the control categories that are applicable to one or more objects through a single interaction. This new option facilitates the work of modelers by reducing the time needed to make changes on the pertinent control associations related to various objects. Now, the objects can be selected in LISTE page and then the respective control that are applicable to them through a single interaction. Users can select Control associations in Process, Performance, Risk, Control and Capability modules.

## How it works

To use this feature, users select the objects to edit the categories by marking the check boxes

The screenshot shows the 'PROCESS' module interface. On the left, a sidebar lists categories: 'SOP EXPORT', '[fr] Ressources Humaines', 'Human Resources' (selected), and 'Product Planning'. The main area displays a table with columns: 'Sequence #', 'Name', 'Role', and 'Documents'. The table contains five rows of control categories. The first three rows are highlighted with a red box, indicating they are selected for multi-edit. The first row is 'Develop Human Capital' with a value of '1' in the 'Documents' column. The second row is 'Employee Vacation Planning'. The third row is 'Hiring Campaign'. The fourth row is 'Job Interview Procedure'. The fifth row is 'Manage Human Capital'. The top bar shows 'PROCESS' and a 'NEW' button. The bottom right has 'Filters' and 'Columns' icons.

Sequence #	Name	Role	Documents
<input checked="" type="checkbox"/>	Develop Human Capital		1
<input checked="" type="checkbox"/>	Employee Vacation Planning		
<input checked="" type="checkbox"/>	Hiring Campaign		
<input type="checkbox"/>	Job Interview Procedure		
<input type="checkbox"/>	Manage Human Capital		

Then click on the three-dots on the top. When the drop down list appears, select **Edit**

The screenshot shows the 'PROCESS' application interface. On the left, there's a sidebar with 'SOP EXPORT' and a list of categories: '[fr] Ressources Humaines', 'Human Resources', and 'Product Planning'. The main area displays a table of SOPs. A context menu is open over the table, showing options: Publish, Edit Responsibilities, Subscribe, Unsubscribe, Custom Attributes, Edit (highlighted), Delete, and Move. The table has columns: Process #, Name, Role, and Documents. The SOPs listed are: Develop Human Capital (1 document), Employee Vacation Planning, Hiring Campaign, Job Interview Procedure, and Manage Human Capital.

Expand “**Which Controls are applicable?**”. There, users can make the changes on controls for the selected objects

The screenshot shows the 'Edit Objects' dialog box. It has two tabs: 'GENERAL' and 'PROPERTIES'. The 'GENERAL' tab is active, showing a list of questions. The question 'Which Controls are applicable?' is highlighted with a red box. The dialog has 'Save & Close' and 'Cancel' buttons.

# Multi-Edit – Master Data

## Functionality

The Multi-Edit Master Data selection feature will allow modelers to select the master data categories that are applicable to one or more object through a single interaction. This new option facilitates the work of modelers by reducing the time needed to make changes on the pertinent control associations related to various objects. Now, the objects can be selected in LISTE page and then the respective control that are applicable to them through a single interaction. Users can select Control associations in Process and Organization modules.

## How it works

Users will navigate to the list view of a module that allows for Master Data association (Ex:Process), choose the select checkbox of the objects to edit their Master Data.

	Sequence #	Name	Role	Documents
<input checked="" type="checkbox"/>		Develop Human Capital		1
<input checked="" type="checkbox"/>		Employee Vacation Planning		
<input checked="" type="checkbox"/>		Hiring Campaign		
<input type="checkbox"/>		Job Interview Procedure		
<input type="checkbox"/>		Manage Human Capital		

Then when clicking on the three-dot icon on the page header and selecting Edit.

The screenshot shows the 'PROCESS' module interface. On the left, there is a sidebar with a tree view containing 'SOP EXPORT', '[fr] Ressources Humaines', 'Human Resources', and 'Product Planning'. The main area displays a list of processes under the 'LIST' tab. A context menu is open over the list, showing options: Publish, Edit Responsibilities, Subscribe, Unsubscribe, Custom Attributes, Edit (highlighted with a red box), Delete, and Move. The list of processes includes columns for Process #, Name, Role, and Documents. The processes listed are: Develop Human Capital, Employee Vacation Planning, Hiring Campaign, Job Interview Procedure, and Manage Human Capital.

Process #	Name	Role	Documents
	Develop Human Capital		1
	Employee Vacation Planning		
	Hiring Campaign		
	Job Interview Procedure		
	Manage Human Capital		

Users will find **Which Master Data are used?** on Modules Process and Organization. Then users can edit and save the changes made to the master data in all the previously selected objects.

The screenshot shows the 'Edit Objects' dialog box. It has two tabs: 'GENERAL' and 'PROPERTIES'. The 'GENERAL' tab is active, showing a list of objects. The objects are: 'Which Documents are used?', 'How is Performance measured?', 'Which Business Rules are applicable?', 'Which Risks are applicable?', 'Which Controls are applicable?', and 'Which Master Data are used?'. The last object, 'Which Master Data are used?', is highlighted with a red box. There are 'Save & Close' buttons at the top right and bottom right, and a 'Cancel' button at the bottom right.

Object
Which Documents are used?
How is Performance measured?
Which Business Rules are applicable?
Which Risks are applicable?
Which Controls are applicable?
Which Master Data are used?

# Multi-Edit – Properties

---

## Functionality

The Multi-Edit Properties tab feature allows modelers to select the properties that are applicable to one or more objects through a single interaction. This new option facilitates the work of modelers by reducing the time needed to make changes on the properties related to the selected objects. Now, the objects can be selected in LIST page and then the respective properties that are applicable to them in PROPERTIES tab. Users have the Multi-Edit PROPERTIES tab in all modules.

## Customization

All the modules allow to select the type of object and the category:

- What type of process is this?
- Which categories are applicable?

Process and Organization allow to select other properties specific to the modules:

### Process

- What are the BPMN properties? There the user can select the Default map shape type and Process display preference
- How strict is this process? (Data harmonization of process)
- What are the Requirements to implement?
- What are the UAT to implement?

### Organization

- What are the BPMN properties?

## How it works

To use this feature, users simply select the objects to edit the categories by marking the check boxes

PROCESS

NEW

SOP EXPORT

LIST GRAPH DETAILS

Sequence # Name Role Documents

<input checked="" type="checkbox"/>	1	Develop Human Capital		1
<input checked="" type="checkbox"/>		Employee Vacation Planning		
<input checked="" type="checkbox"/>		Hiring Campaign		
<input type="checkbox"/>		Job Interview Procedure		
<input type="checkbox"/>		Manage Human Capital		

Then click on the three-dots on the top. When the drop down list appears select **Edit**

PROCESS

NEW

SOP EXPORT

LIST GRAPH DETAILS

Sequence # Name Role Documents

<input checked="" type="checkbox"/>	1	Develop Human Capital		1
<input checked="" type="checkbox"/>		Employee Vacation Planning		
<input checked="" type="checkbox"/>		Hiring Campaign		
<input type="checkbox"/>		Job Interview Procedure		
<input type="checkbox"/>		Manage Human Capital		

- Publish
- Edit Responsibilities
- Subscribe
- Unsubscribe
- Custom Attributes
- Edit**
- Delete
- Move

Click on the tab **PROPERTIES** and select the property to edit.

Edit Objects

GENERAL PROPERTIES

Save & Close

- What are the BPMN properties?
- What type of Process is this?
- How strict is this process?
- What are the Requirements to implement?
- What are the UAT to implement?
- Which Categories are applicable?

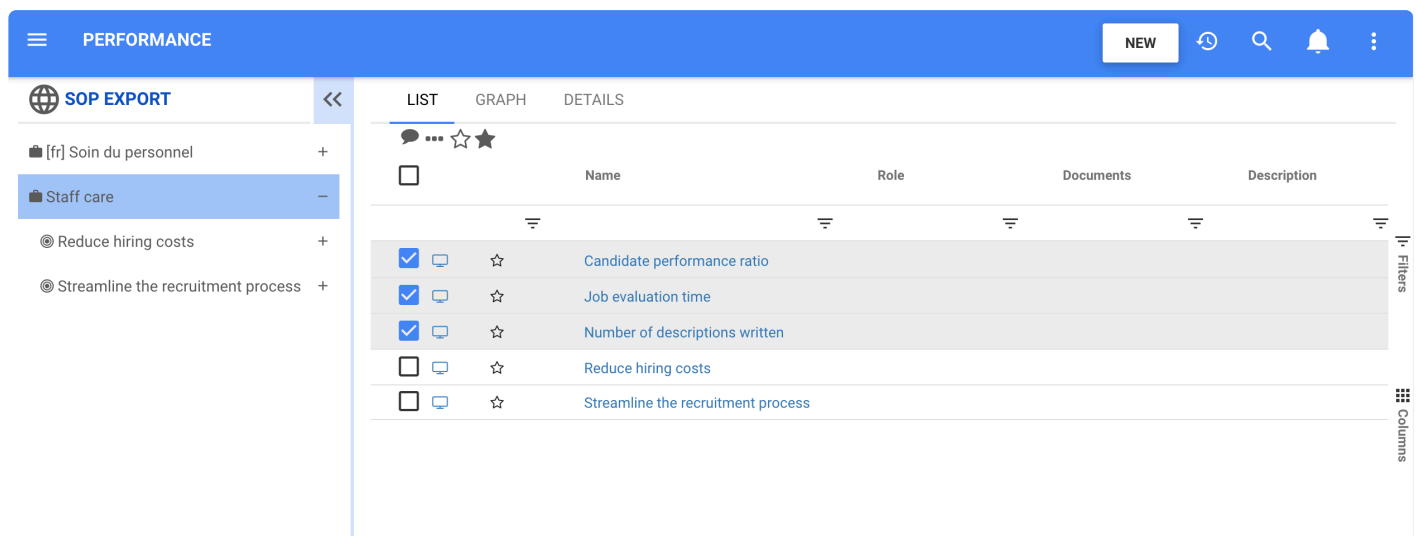
# Multi-Edit – Categories

## Functionality

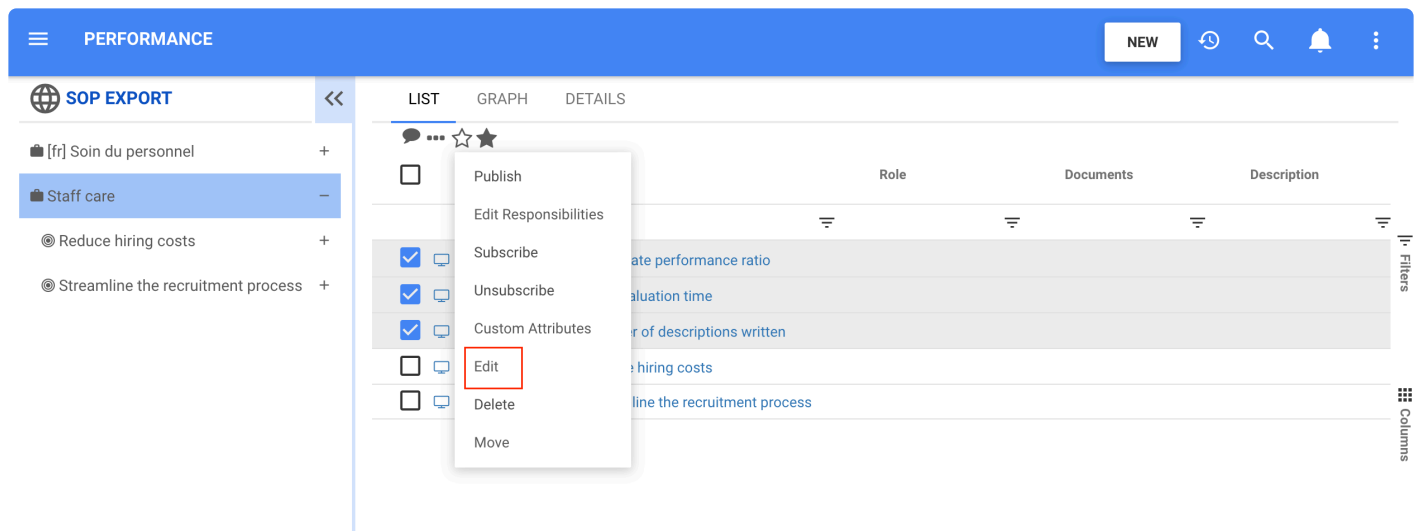
The Multi-Edit-Categories selection feature will allow modelers to select the categories that are applicable to one or more objects through a single interaction. This new option facilitates the work of modelers by reducing the time needed to make changes on the categories related to the selected objects. Now, the objects can be selected in LISTE page and then the respective categories that are applicable to them in PROPERTIES tab. This feature is found in all the modules of EPC.

## How it works

To use this feature, users simply select the objects to edit the categories by marking the check boxes



Then click on the three-dots on the top, when the drop down list appears select **Edit**





Go to tab PROPERTIES and expand **“Which Categories are applicable?”** to edit categories.

The screenshot shows a dialog box titled "Edit Objects" with a close button (X) in the top right corner. Below the title bar, there are two tabs: "GENERAL" and "PROPERTIES". The "PROPERTIES" tab is selected and highlighted with a red box. In the top right corner of the dialog, there is a blue button labeled "Save & Close". Below the tabs, there are two expandable sections, each with a blue header bar and a plus sign on the right. The first section is titled "What type of Object is this?". The second section is titled "Which Categories are applicable?" and is highlighted with a red box. At the bottom right of the dialog, there are two buttons: a grey "Cancel" button and a blue "Save & Close" button.

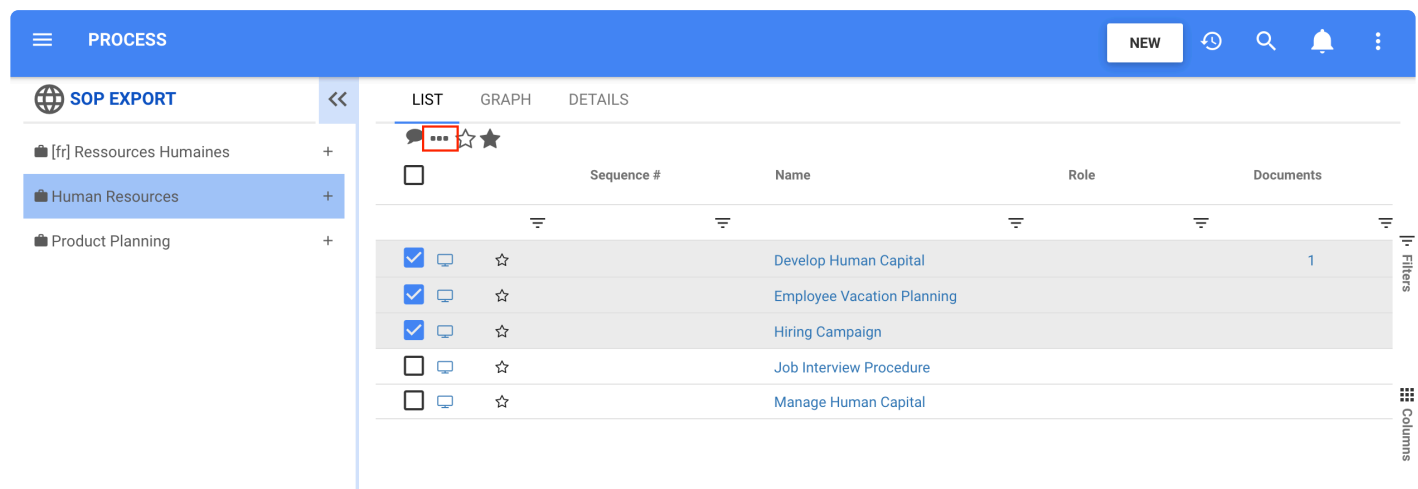
# Mass-Delete

## Functionality

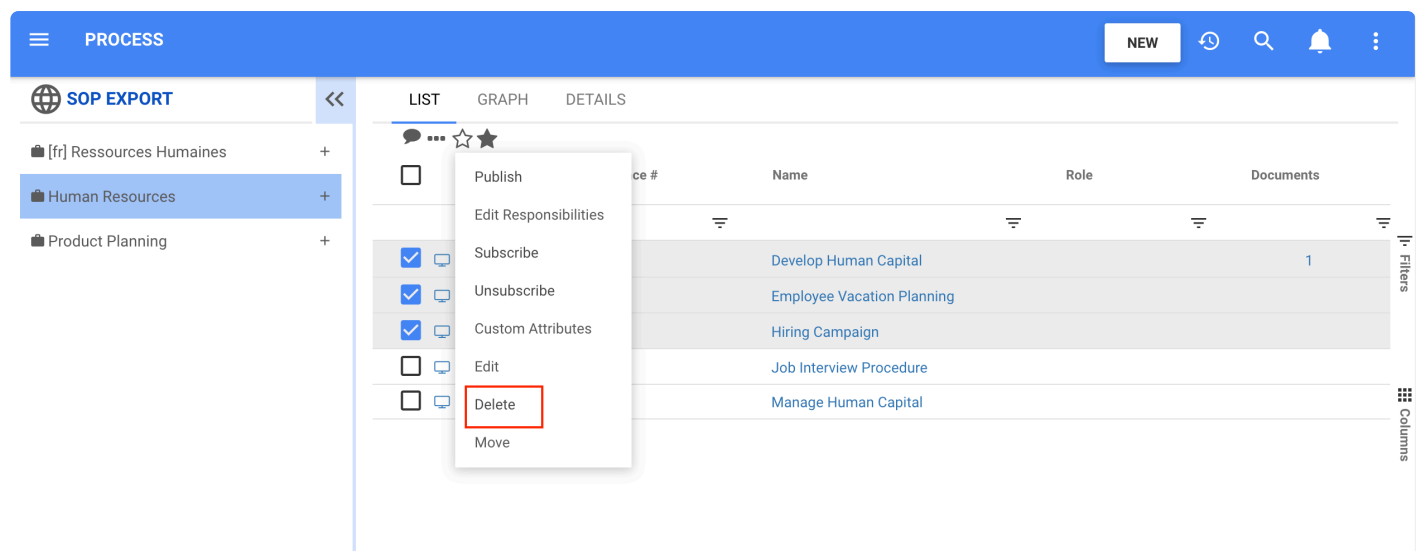
Another addition to EPC is the Mass-Delete, this feature allows modelers to delete more than one object through a single interaction. Once the object(s) is deleted, all its existing associations and children objects are also removed. This new option facilitates the work of modelers by reducing the time needed to remove various objects.

## How it works

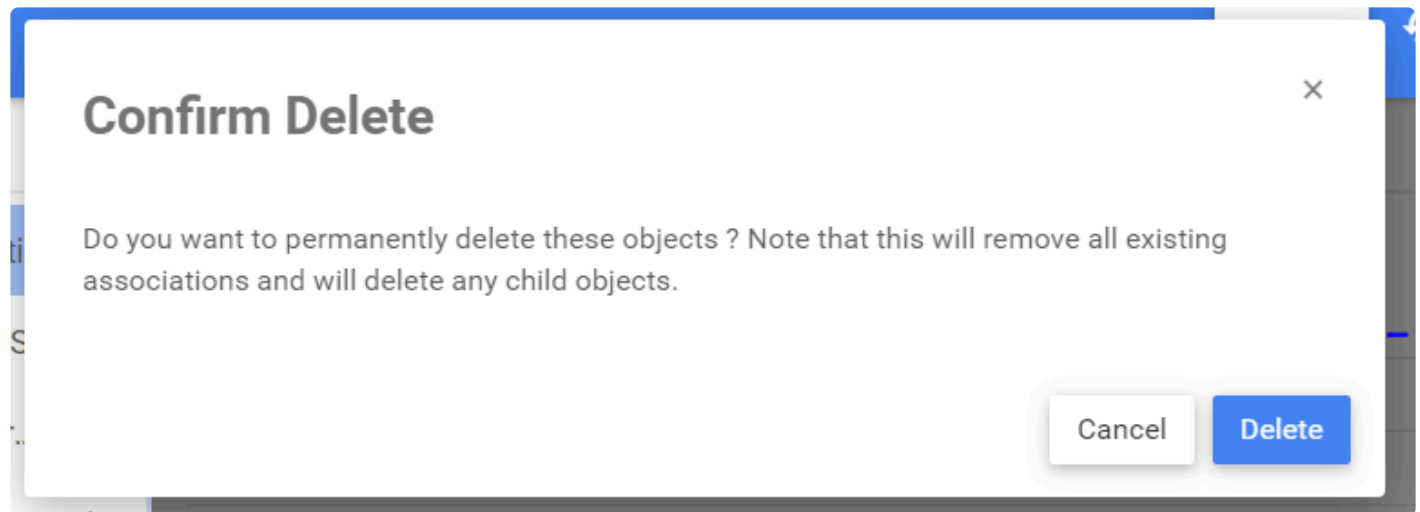
To use this feature, users select the checkbox of the objects to delete. After selecting the objects to be deleted and clicked on the three-dots,



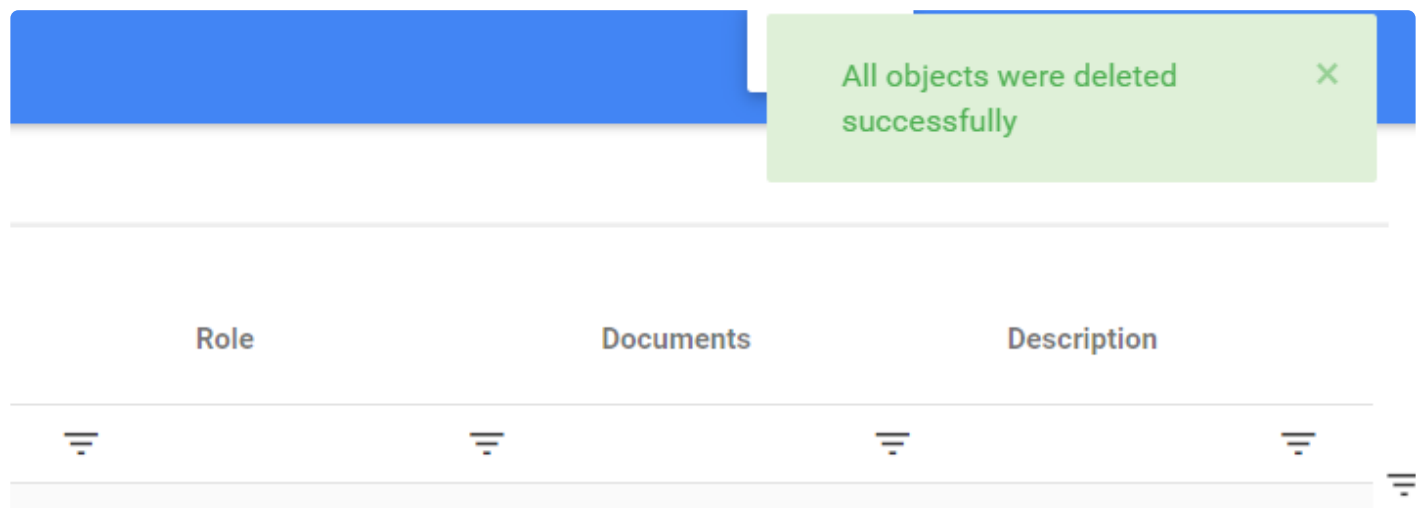
Users can find the option **Delete** on the extendable list.



Once the user clicks on Delete, to make sure the user doesn't delete any object by accident, a window opens to confirm the deletion



After the object have been removed a confirmation message appears



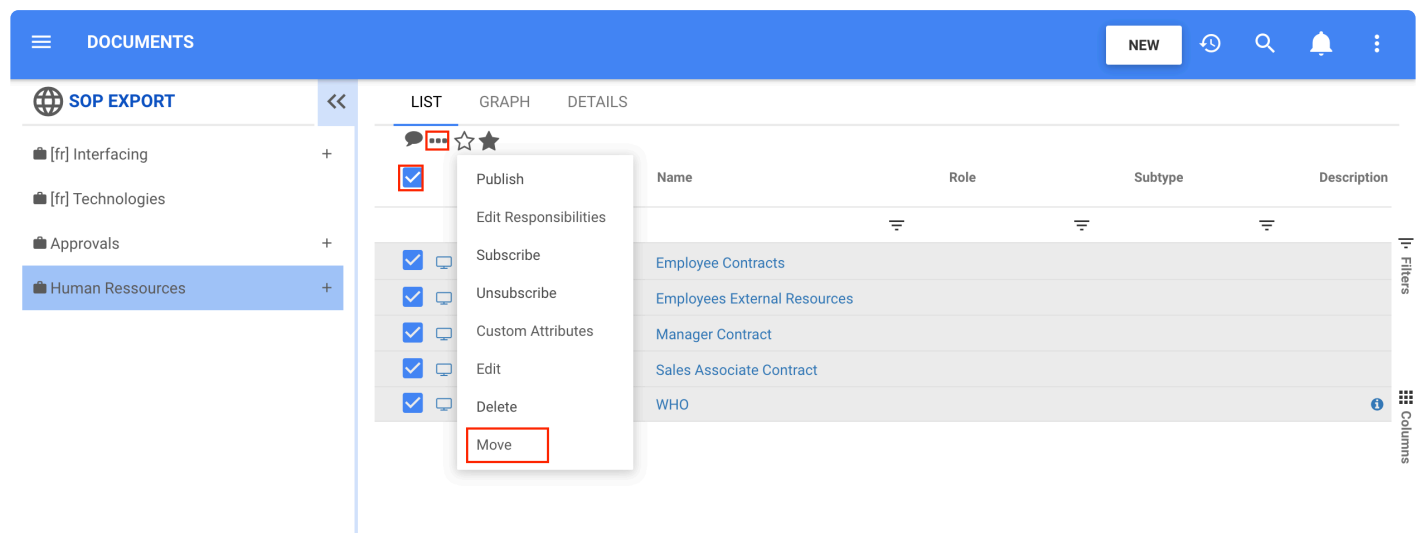
# Mass-Move

## Functionality

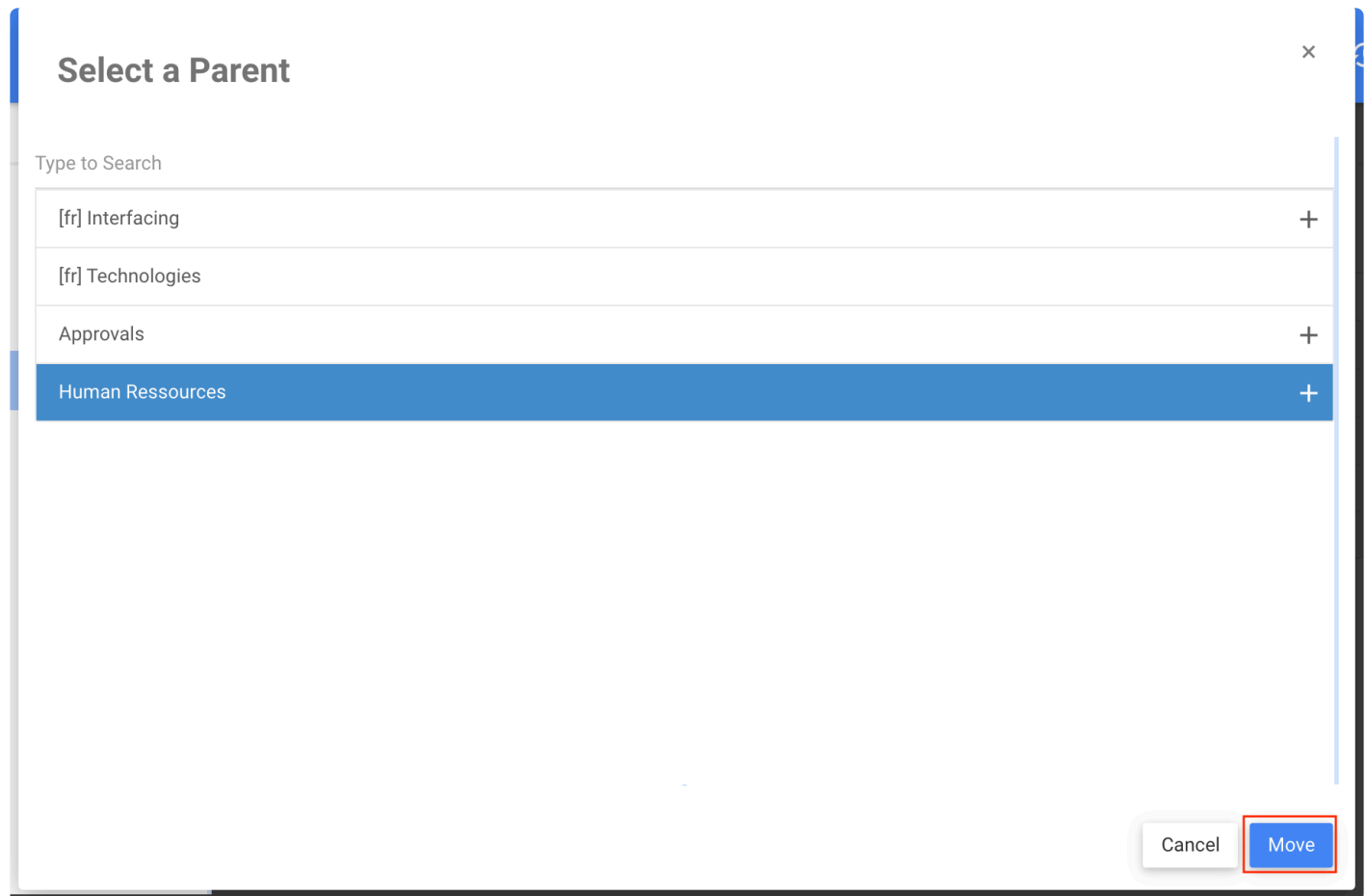
The Mass-Move feature allows modelers to move the several objects at once. This new option facilitates the work of modelers by reducing the time needed to move various objects. Now, the objects can be selected in LIST page and then move to a new parent.

## How it works

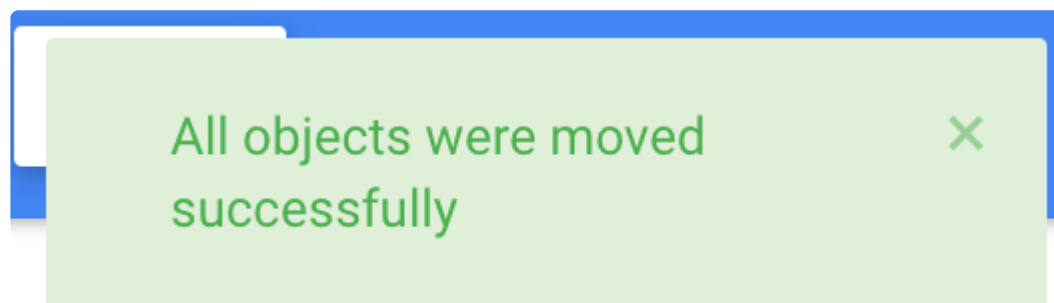
To use these feature, a user chooses one or more objects by marking the checkbox of the objects to be moved to enable the three-dots, then select the **Move** option from the menu.



A window to select the parent to where to move the objects appears.



Once the user confirm Move, a confirmation notification will appear to confirm that the objects have been move successfully



# Batch Task Completion

## Functionality

Now in EPC, approving, endorsing, and confirming multiple objects on the To-Do page just became incredibly easier for both modelers and system admins! This new option significantly increases productivity, enabling modelers to make multiple changes quickly & effortlessly.

## Customization

- [Batch-Approval](#)
- [Batch-Endorsement](#)
- [Batch-Confirmation](#)

## How it Works

To use this feature, users go to the To-Do list. There, users will see all pending Actions. To filter their pending approvals, endorsements, confirmations, users can click on its respective buttons.

The screenshot displays the 'TO DO' interface. At the top, a blue header bar contains a menu icon, the text 'TO DO', a 'NEW' button, and icons for refresh, search, notifications, and a settings menu. Below the header, a 'LIST' tab is selected. The main area features a grid of filter buttons: 'Over Due 0' (red), 'Due Today 0' (orange), 'Due Soon 0' (green), 'Confirmation 0', 'Approval 12' (highlighted with a red border), 'Endorsement 1', 'IR to Implement 0', 'IR to Review 0', 'IR to Publish 0', 'Update to Review 0', and 'Out Of Sync 0'. To the right of these buttons is a vertical 'Filters' icon. Below the filters is a table with columns: Sequence #, Name, Parent Name, Action Type, Type, and Pending Si. The table contains four rows of data, with the first column of checkboxes highlighted by a red box. The first row shows an 'Endorsement' action for '[fr] Ressources Humaines'. The second row shows an 'Approval' action for '[fr] Recrutement' under the parent '[fr] Ressources Humaines'. The third row shows an 'Approval' action for '[fr] Planification des produits' under the parent '[fr] Ressources Humaines'. The fourth row shows an 'Approval' action for 'Definitions' under the parent '[fr] Ressources Humaines'. A red box highlights the three-dot menu icon in the 'Action Type' column of the first row.

Sequence #	Name	Parent Name	Action Type	Type	Pending Si
<input type="checkbox"/>	[fr] Ressources Humaines		Endorsement	Risk Set	23-Jul-20
<input type="checkbox"/>	[fr] Recrutement	[fr] Ressources Humaines	Approval	Process	30-Jul-20
<input type="checkbox"/>	[fr] Planification des produits	[fr] Ressources Humaines	Approval	Process	22-Jul-20
<input type="checkbox"/>	Definitions	[fr] Ressources Humaines	Approval	Risk Set	23-Jul-20

When clicking on the three-dots an extendable list appears. Users are able to select if Approve or Reject them.

TO DO

NEW

LIST

Over Due0

Due Today0

Due Soon0

Confirmation 0

Approval 12

Endorsement 1

IR to Implement 0

IR to Review 0

IR to Publish 0

Update to Review 0

Out Of Sync 0

Approval

Approve

Reject

	Parent Name	Action Type	Type	Pending Si	
<input type="checkbox"/>	[fr] Ressources Humaines	Endorsement	Risk Set	23-Jul-20	
<input checked="" type="checkbox"/>	[fr] Recrutement	[fr] Ressources Humaines	Approval	Process	30-Jul-20
<input checked="" type="checkbox"/>	[fr] Planification des produits	[fr] Ressources Humaines	Approval	Process	22-Jul-20
<input checked="" type="checkbox"/>	Definitions	Approval	Risk Set	23-Jul-20	

# Batch-Approval

## Functionality

We have introduced Batch-Approval to EPC with this release. This feature allows users to quickly approve more than one object in the To Do's page through a single interaction. This new option helps modelers by reducing the time needed to approve various objects. Now, the objects can be selected in the TO DO's page and approved immediately.

## How it works

To use this feature, users go to the To Do list. There, users will see all pending Actions. To filter their pending Approvals, users can click on the Approval button, use the filter in Action type or simple select the pending approvals by clicking on the checkbox of the objects.

The screenshot displays the 'TO DO' interface. At the top, a blue header bar contains a menu icon, the text 'TO DO', a 'NEW' button, and icons for refresh, search, notifications, and a settings menu. Below the header, a 'LIST' tab is selected. The main content area features a dashboard with status cards: 'Over Due 0' (red), 'Due Today 0' (orange), 'Due Soon 0' (green), 'Confirmation 0', 'Approval 12' (highlighted with a red box), 'Endorsement 1', 'IR to Implement 0', 'IR to Review 0', 'IR to Publish 0', 'Update to Review 0', and 'Out Of Sync 0'. Below these cards is a table with columns: Sequence #, Name, Parent Name, Action Type, Type, and Pending Si. The table contains four rows of data, with the first column (checkboxes) highlighted by a red box. A red box also highlights the three-dot menu icon in the 'Action Type' column of the first row. On the right side, there are vertical labels 'Filters' and 'Columns'.

Sequence #	Name	Parent Name	Action Type	Type	Pending Si
<input type="checkbox"/>	[fr] Ressources Humaines		Endorsement	Risk Set	23-Jul-20
<input type="checkbox"/>	[fr] Recrutement	[fr] Ressources Humaines	Approval	Process	30-Jul-20
<input type="checkbox"/>	[fr] Planification des produits	[fr] Ressources Humaines	Approval	Process	22-Jul-20
<input type="checkbox"/>	Definitions		Approval	Risk Set	23-Jul-20

When clicking on the three-dots an extendable list appears. Users are then able to select Approve and then choose from the options Approve or Reject.



TO DO

NEW

LIST

Over Due0

Due Today0

Due Soon0

Confirmation 0

Approval 12

Endorsement 1

IR to Implement 0

IR to Review 0

IR to Publish 0

Update to Review 0

Out Of Sync 0

Approval

Approve

Reject


	Parent Name	Action Type	Type	Pending Si
<input type="checkbox"/>	[fr] Ressources Humaines	Endorsement	Risk Set	23-Jul-20
<input checked="" type="checkbox"/>	[fr] Recrutement	Approval	Process	30-Jul-20
<input checked="" type="checkbox"/>	[fr] Planification des produits	Approval	Process	22-Jul-20
<input checked="" type="checkbox"/>	Definitions	Approval	Risk Set	23-Jul-20


Next, users can approve all the selected objects:


If the approval request asked for an approval with e-signature, then users see the following image.

## Approval Authentication

Please provide your login credentials before continuing with this operation.

 User Name

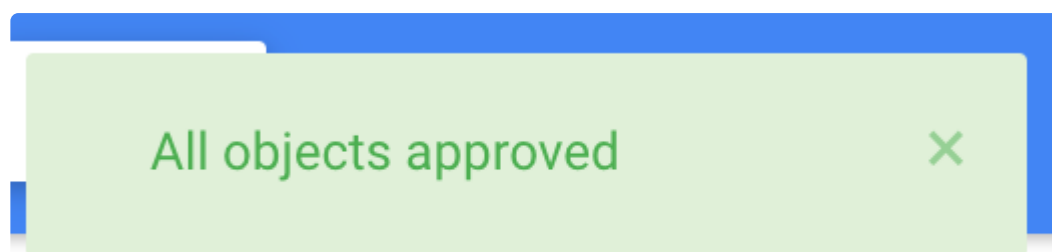
 Password



By Approving with your e-signature, you are signing the document electronically. You agree that your electronic signature has the same legal validity and effect as your handwritten signature on the document, and that it has the same meaning as your handwritten signature.

[Modify Signature](#) Close Approve

If the approval request didn't ask for an e-signature or after approving with e-signature, the users can see a confirmation message on the right top of the page.



# Batch-Endorsement

## Functionality

EPC introduces Batch-Endorsement. This feature allows users to rapidly endorse more than one object at a time in the TO DO list through a single interaction. This new option significantly reduces the time needed to endorse or reject various objects. Now, the objects can be selected in TO DO's page and then quickly endorsed.

## How it works

To use this feature, users have to go to TO DO list. There, users can see all pending actions. To filter their pending endorsements, users can click on the button Endorsement or use the filter in Action type.

The screenshot shows the 'TO DO' list interface. At the top, there's a blue header bar with a menu icon, 'TO DO', a 'NEW' button, and icons for refresh, search, notifications (2), and a settings menu. Below the header, there's a 'LIST' tab. The main area displays a grid of filters: 'Over Due 0' (red), 'Due Today 0' (orange), 'Due Soon 0' (green), 'Confirmation 0', 'Approval 11', 'Endorsement 3' (highlighted with a red border), 'IR to Implement 0', 'IR to Review 0', 'IR to Publish 0', 'Update to Review 0', and 'Out Of Sync 0'. Below the filters is a table with columns: Sequence #, Name, Parent Name, Action Type, Type, and Pending Si. The table contains four rows of data. The 'Action Type' column has a filter icon (three dots) highlighted with a red box.

Sequence #	Name	Parent Name	Action Type	Type	Pending Si
<input type="checkbox"/>	[fr] Ressources Humaines		Endorsement	Risk Set	23-Jul-20
<input type="checkbox"/>	[fr] Planification des produits	[fr] Ressources Humaines	Approval	Process	22-Jul-20
<input type="checkbox"/>	Definitions		Approval	Risk Set	23-Jul-20
<input type="checkbox"/>	[fr] EPC	[fr] Programmes	Approval	Capability	23-Jul-20

In addition, users can simply select the objects with pending endorsement by clicking on their checkbox. Once the objects to be endorsed have been selected, users can find the three dots icon on the left of the list. By clicking on this icon, a list appears, hover the mouse over Endorsement and choose Endorse or Do Not Endorse.

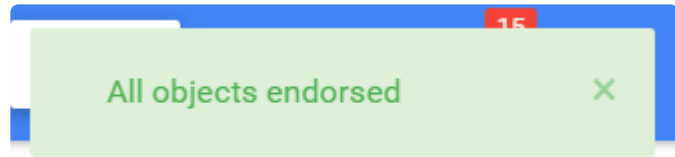
The dashboard features a blue header with a 'TO DO' title, a 'NEW' button, and icons for refresh, search, notifications (4), and a menu. Below the header, a 'LIST' tab is active. The main area displays a grid of task count buttons: 'Over Due 0' (red), 'Due Today 0' (orange), 'Due Soon 0' (green), 'Confirmation 0', 'Approval 11', 'Endorsement 3' (highlighted with a red box), 'IR to Implement 0', 'IR to Review 0', 'IR to Publish 0', 'Update to Review 0', and 'Out Of Sync 0'. A sidebar on the right contains 'Filters' and 'Columns' sections. A table below the grid lists tasks with columns for checkboxes, parent names, action types, types, and pending dates. A red box highlights the 'Endorsement' dropdown menu, which shows 'Endorsed' and 'Not Endorsed' options. The table data is as follows:

	Parent Name	Action Type	Type	Pending Si
<input checked="" type="checkbox"/>	[fr] Ressources Humaines	Endorsement	Risk Set	23-Jul-20
<input checked="" type="checkbox"/>	Job Interview Procedure	Endorsement	Process	19-Aug-20
<input checked="" type="checkbox"/>	Hiring Campaign	Endorsement	Process	19-Aug-20

Then a window to write a comment opens and users finish by clicking in the button to Endorse/ Not Endorse.

The 'Endorsed' modal window has a title bar with a close button (X). The main content area is titled 'Endorsed' and contains a 'Comment' section with a large text input field. At the bottom right, there are two buttons: 'Cancel' and 'Endorsed' (highlighted in blue).

Once users click on endorse, then a message appears confirming the endorsement.



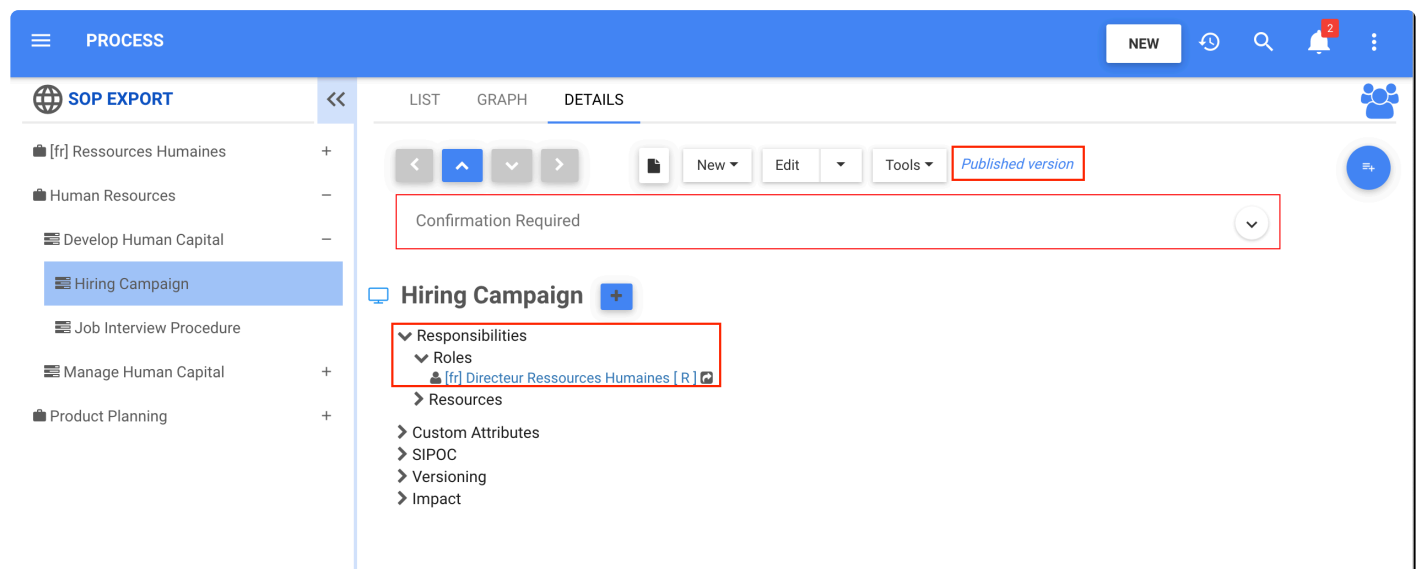
# Batch-Confirmation

## Functionality

EPC also introduced Batch-Confirmation. This feature allows users to quickly confirm their agreement with the publication of several objects for which they are responsible with a single interaction. This new option significantly reduces the time required to confirm acknowledgement of the publication of multiple objects.

## How it works

To use this feature, users must have been assigned in the objects' RASCI. Each time the object to which the user is connected through a RASCI is published, these users will have to confirm their acknowledgement of the publication of the objects.



Users can see all confirmations pending in TO DO. There, they can select to see only the object needing confirmation(s) by clicking on the Confirmation button.

Filters Columns

The screenshot shows a 'TO DO' dashboard. At the top, there's a blue header bar with a menu icon, the text 'TO DO', a 'NEW' button, and icons for refresh, search, notifications (with a red badge showing '2'), and a settings menu.

Below the header, the word 'LIST' is underlined. The main area features a funnel chart with four stages:

- Over Due**: Red box with '0'
- Due Today**: Orange box with '0'
- Due Soon**: Green box with '0'
- Pending Approval**: Light green box with '0'

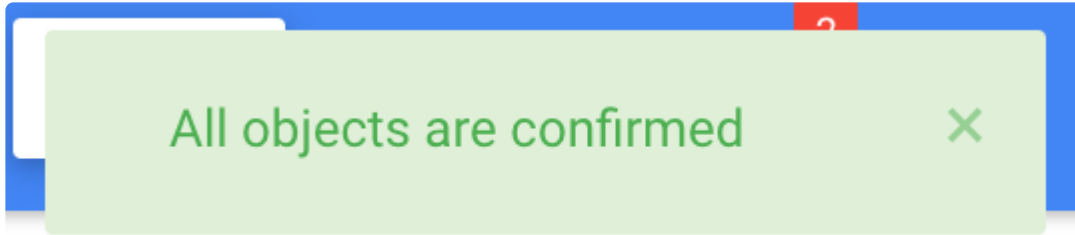
Below the funnel chart are eight teal boxes arranged in two rows, representing different action types and their counts:

- Confirmation 1
- Approval 11
- Endorsement 0
- IR to Implement 0
- IR to Review 0
- IR to Publish 0
- Update to Review 0
- Out Of Sync 0

At the bottom, there's a table with columns: Name, Parent Name, Action Type, Type, and Pending SI. A red box highlights the first row, which has a dropdown arrow next to it.

Name	Parent Name	Action Type	Type	Pending SI
Confirm		(1) Confirmation	Process	19-Aug-20

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# Information Security Default Attributes Added to Assets

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## Functionality

EPC has added a new default Information Security Attributes added to Asset objects (systems, applications, databases, etc.)

These new assets have been added to audit trails, payload, import and export, Edit and Information Security in the DETAILS page.

## Customization

### **SLA – Service Level Agreement**

As a Web Modeler, you can define the Service Level Agreement in the Asset's Information Security attribute by percentage.

### **RTO – Recovery Time Objective**

System Admins can add and customize an Asset's Information Security Attributes with an object of type Duration. The Duration type is a numerical value.

### **RPO – Recovery Point Objective**

System Admins can add and customize an Asset's Information Security Attributes with an object of type Duration. The Duration type is a numerical value.

### **Business Priority**

Web Modeler can define the Business Priority attribute in the Asset's Information Security. It is a single select, static dropdown field that consists of predefined values that allow a modeler to select only one value at a time from the dropdown.

### **Business Impact**

A Web Modeler can define the Business Impact attribute in the Asset's Information Security. It is a single select static dropdown field that consists of predefined values that allow a modeler to select only one value at a time from the dropdown.

### **Security Rating**

A Web Modeler can define the Security Rating attribute in the Asset's Information Security. It is a single

select static dropdown field that consists of some predefined values that allow a modeler to select only one value at a time from the dropdown.

### **Service Hours**

A Web Modeler can define the Service Hours attribute in the Asset's Information Security attribute. It is a normal text box field.

### **Serial Number**

A Web Modeler can define the Service Number attribute in the Asset's Information Security attribute. It is a normal text box field.

### **Data Sensitivity**

A Web Modeler can define the Data Sensitivity attribute in the Asset's Information Security attribute. It is a single select, static dropdown field that consists of predefined values that allow a modeler to select only one value at a time from the dropdown. Users can choose from six option for **Data Sensitivity** attribute: No value, Restricted, Confidential, Sensitive, Normal and Low.

### **Personal Information**

A Web Modeler can define the Personal Information attribute in the Asset's Information Security attribute. It is a single select, static dropdown field that consists of predefined values that allow a modeler to select only one value at a time from the dropdown.

### **Vendor/Technology Supplier**

A Web Modeler can add the Vendor/Technology Supplier attribute in the Asset's Information Security attribute. It is a normal text box field.

### **Current Release Version**

A Web Modeler can add the Current Release Version attribute in the Asset's Information Security attribute. It is a normal text box field.

### **Vendor Release Status**

A Web Modeler can define the Vendor Release Status attribute in the Asset's Information Security attribute. It is a single select, static dropdown field that consists of predefined values that allow a modeler to select only one value at a time from the dropdown.

### **Delivery Model**

A Web Modeler can define the Delivery Model attribute in the Asset's Information Security attribute. It is a single select, static dropdown field that consists of predefined values that allow a modeler to select only one

value at a time from the dropdown.

## Environment

A Web Modeler can define the Environment attribute in the Asset's Information Security attribute. It is a single select, static dropdown field that consists of predefined values that allow a modeler to select only one value at a time from the dropdown.

## Life Cycle Status

A Web Modeler can define the Life Cycle Status attribute in the Asset's Information Security attribute. It is a single select, static dropdown field that consists of predefined values that allow a modeler to select only one value at a time from the dropdown.

# How it works

To use this feature, users have to select an asset, and click on Edit. When the form appears, click on PROPERTIES, and there the option What are the Assets Information Security Attributes? is displayed as the last option.

When the user expands the option, they can edit its properties.




What Type of Asset is this?		+
Which Categories are applicable?		+
What are the Attributes?		+
What are the Asset's information security attributes		-

Attribute	Value
SLA	00.0%
RTO	Name
RPO	Name
Business Priority	NO VALUE
Business Impact	NO VALUE
Security Rating	NO VALUE
Service Hours	Name
Serial Number	Name
Data Sensitivity	NO VALUE
Personal Information	NO VALUE
Vendor/Technology Supplier	Name
Current Release Version #	Name
Vendor Release Status	NO VALUE
Delivery Model	NO VALUE
Environment	NO VALUE
Life Cycle Status	NO VALUE

CancelSave & Close

Once the Asset's Information Security Attributes is defined, it will be found on the DETAIL page, under **Information Security**.

LIST GRAPH DETAILS

Edit Tools Publish

**Sales Force** Draft

> Associations

> Custom Attributes

▼ Information Security

BUSINESS PRIORITY	Medium
BUSINESS IMPACT	High
SECURITY RATING	Very High
DATA SENSITIVITY	Normal
VENDOR/TECHNOLOGY SUPPLIER	Salesforce.com, Inc

> Versioning

> Impact

# Add New Asset Attributes to List Page

## Functionality

In order to facilitate the view of the Data Sensitivity and Vendor/Technology Supplier attributes, these two attributes have been added to the LIST page. Now, users can add and view the Data sensitivity and Vendor Technology columns on LIST page.

## How it works

To select the attribute Data Sensitivity and Vendor/Technology Supplier, users can go to LIST page of a Org Unit that has assets inside, click on Columns and write eg. vendor to find Vendor technology supplier.

The screenshot displays the EPC application interface. On the left, the 'ORGANIZATION' sidebar shows the hierarchy: Big Business Enterprise, MR Technologies, Org Unit 1, and Sales Department (highlighted). The main area shows the 'LIST' view of assets for the Sales Department. The table has columns: Name, Type, Status, and Data Sensitivity. The assets listed are: Account Executive (Role, In Progress), CRM (Asset, In Progress), Patent L-31 (Asset, In Progress), and Sales Assistant (Role, In Progress). On the right, the 'Columns' panel is open, showing a search for 'vendor'. The 'Columns' panel lists attributes: Vendor/Techno... (checked), Vendor, Vendor Contac..., and Vendor Contac... (truncated). The 'Columns' panel also has buttons for 'Save Columns', 'Save Columns Environment Default', and 'Reset to Default'.

Click on the checkbox of the attributes and save.

ORGANIZATION

TUTORIAL

Big Business Enterprise

MR Technologies

Org Unit 1

Sales Department

LIST GRAPH DETAILS

Name Type Status Data Sensitivity

Account Executive Role In Progress

CRM Asset In Progress NORMAL

Patent L-31 Asset In Progress SENSITIVE

Sales Assistant Role In Progress

Search...

Select Box

Graph

Favorite

Name

Type

Status

Data Sensitiv...

Vendor/Techno...

Data Sensitiv...

Parent

Identifier

Save Columns

Save Columns Environment Default

Reset to Default

Page 1 of 1

Show: 10 - 25 - 50

Then the two columns should appear with the respective information of Data Sensitivity and Vendor/Technology Supplier of the assets being displayed.

ORGANIZATION

TUTORIAL

Big Business Enterprise

MR Technologies

Org Unit 1

Sales Department

LIST GRAPH DETAILS

Name Type Status Data Sensitivity Vendor/Technology Su...

Account Executive Role In Progress

CRM Asset In Progress NORMAL Jamieson

Patent L-31 Asset In Progress SENSITIVE NARS

Sales Assistant Role In Progress

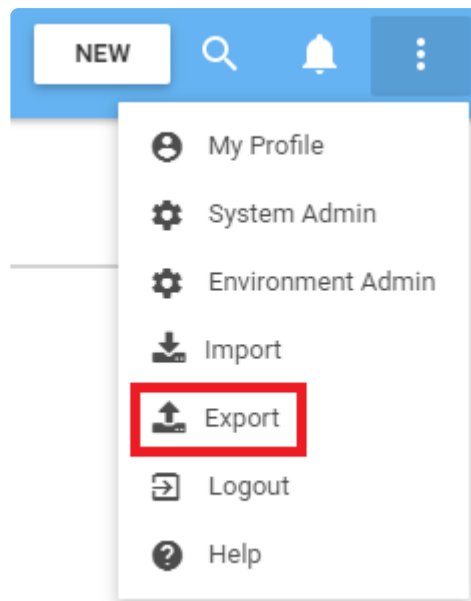
# Add New Asset Attributes on Import/Export

## Functionality

The new section of PROPERTIES What is the Asset's information attribute? in assets has been also added to export and import. Now when the System Admin imports or export assets, this information will be also part of the asset object data.

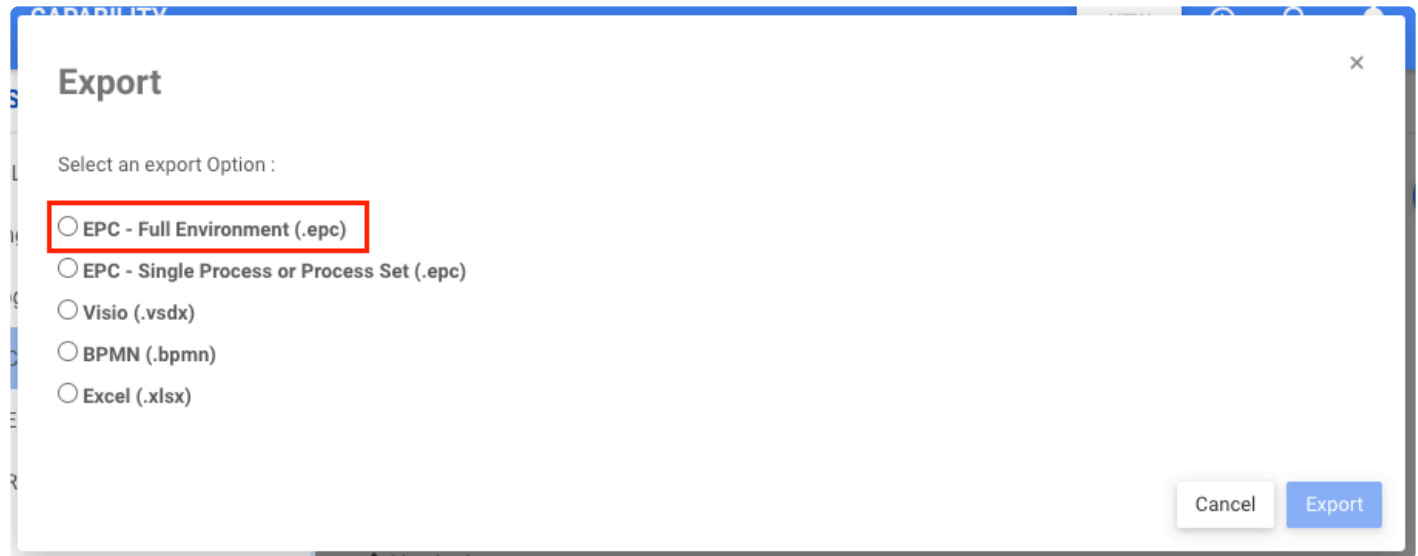
## How it works

To use this feature, users click on the three-dot icon on the top-right of the page, then an extendable list appears, where the users can select import or export data from the current EPC environment.

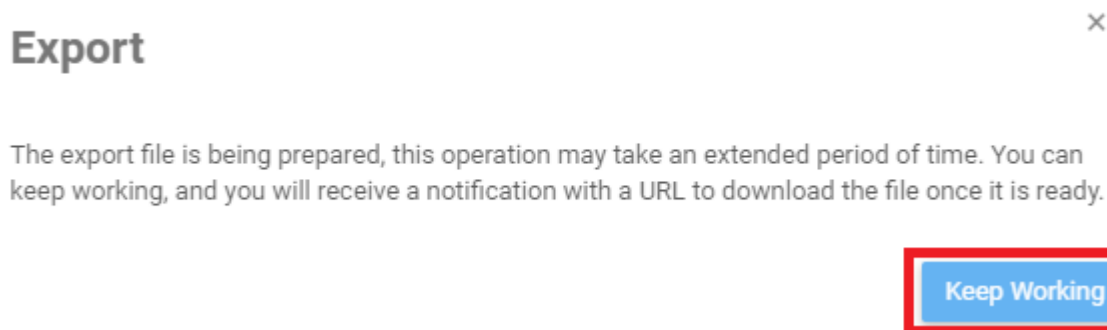


Then the user can choose the format to export or import.

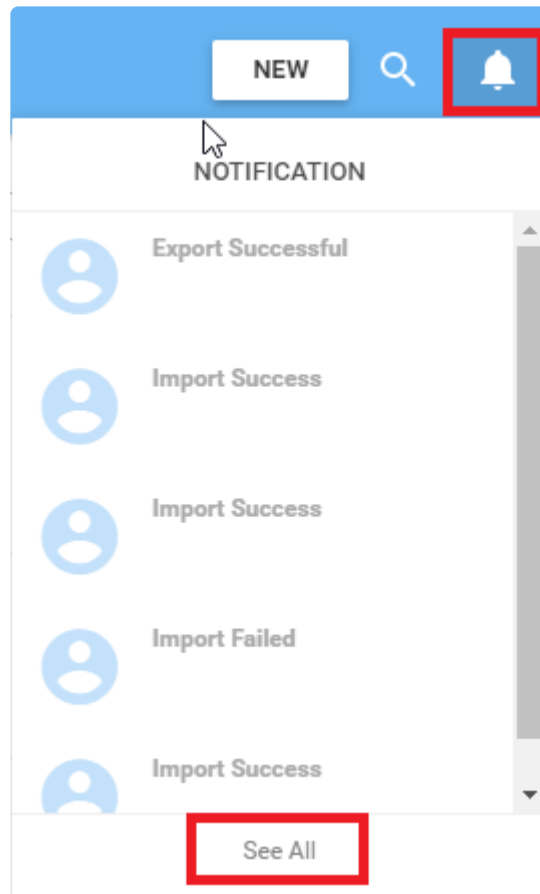




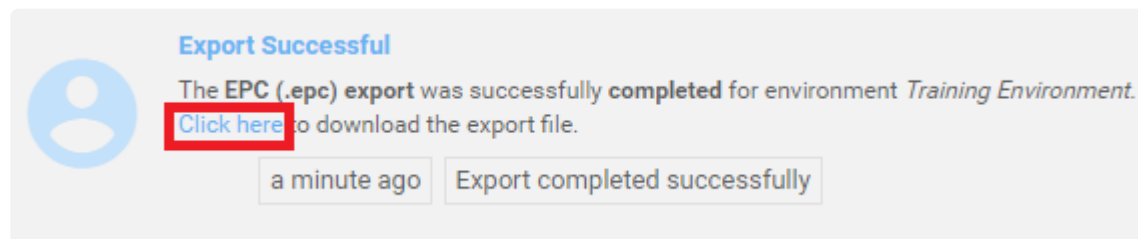
Users click on Export/ Import to confirm and a message will confirm the success of the import or export. Then a message appears to allow users to continue working while the document is being prepared.



Once the document is ready, a notification appears to confirm the document is ready



When the user clicks in the notification, then a list appears and the item contains the link to download the export file in the requested format.



The exported document has all the new asset properties as part of the document.

When importing a document the users can add this information as part of their document.

# Right Click Actions Added to all objects in the Hierarchy Trees

---

## Functionality

EPC now gives modelers the option to create, edit, copy, move and delete objects directly from the right click within the tree of all modules. This substantially improves the usability to create and edit objects within the tool.

## Customization

When modelers click on set in the tree, modelers can create new objects inside of the set, edit, copy and delete the Set

When modelers click on any object inside of the set in the tree, that is part of the three, modelers can create objects inside of them, edit , move, copy and delete

List of object in the different module inside of sets in the tree:

- Process
- Document Folder
- KPI
- KRI
- KCI
- Org Unit
- Risk Folder
- Control Folder
- Rule Folder
- Master Data Folder
- Capability
- Glossary Folder

## How it works

The user selects and object on the tree and then right clicks to see the options.

Right clicking on a set

The screenshot shows the 'PROCESS' application interface. The top navigation bar includes a 'NEW' button and icons for refresh, search, notifications, and a menu. The left sidebar shows a tree view with categories like 'Ensemble de processus im...', 'Planification des produits', 'Ressources Humaines', 'Human Resources', 'Develop Human Capital', 'Manage Human Capital', and 'Product Planning'. The 'Human Resources' category is selected, and a right-click context menu is open over it, listing options: 'New Process', 'Edit', 'Copy', and 'Delete'. The main area displays 'Human Resources [Draft]' with a 'Custom Attributes' section. The bottom right corner has a scroll bar and a refresh button.

Right clicking on an object inside of a set

The screenshot shows the 'PROCESS' application interface. The top navigation bar includes a 'NEW' button and icons for refresh, search, notifications, and a menu. The left sidebar shows a tree view with categories like 'Ressources Humaines', 'Human Resources', 'Develop Human Capital', 'Manage Human Capital', and 'Product Planning'. The 'Develop Human Capital' category is selected, and a right-click context menu is open over it, listing options: 'New Process', 'Edit', 'Move', 'Copy', and 'Delete'. The main area displays a list of objects within the 'Develop Human Capital' set. The list has columns: 'Sequence #', 'Name', 'Role', and 'Documents'. The objects are 'Hiring Campaign' and 'Job Interview Procedure'. The 'Hiring Campaign' object is highlighted, and a right-click context menu is open over it, listing options: 'New Process', 'Edit', 'Move', 'Copy', and 'Delete'. The menu is highlighted with a red rectangle. The bottom right corner has a scroll bar and a refresh button.

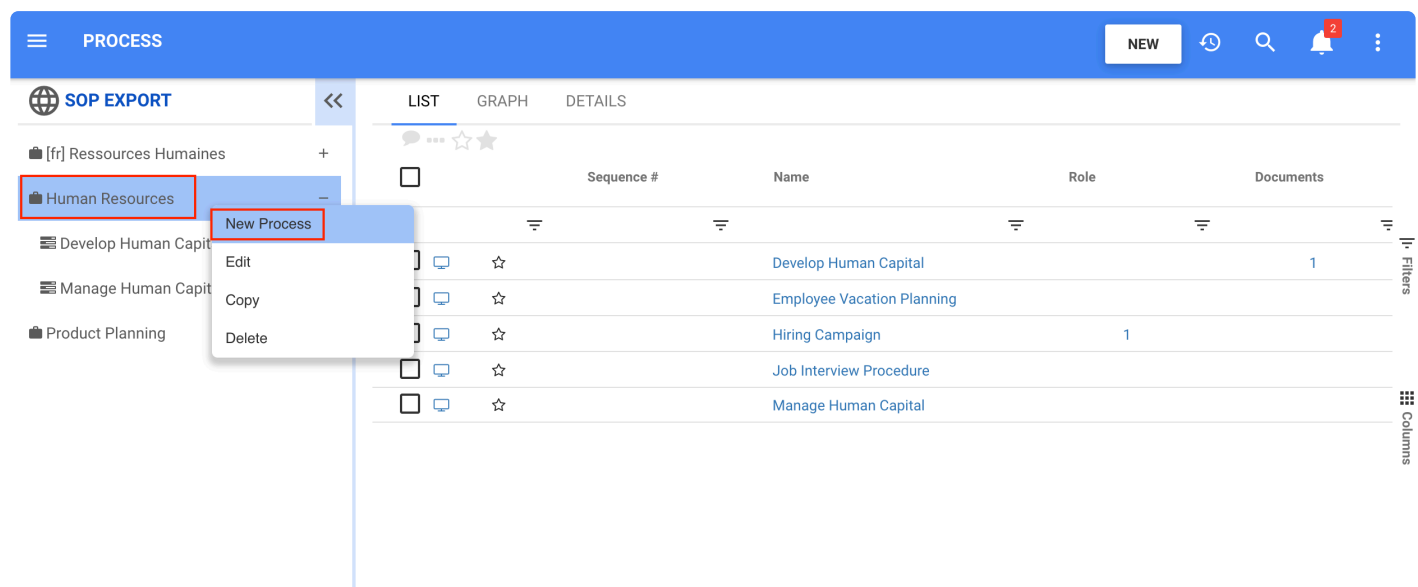
# Right-Click – Process Creation

## Functionality






EPC has created a new option on right click to facilitate the navigation of users. Now, modelers can create a New Process by just pressing right click on the set in module process. This will help modelers to create processes faster.























## How it Works

The user selects a Process Set or a process to see the extended list of Right Click.



Then click on New Process and the form to Add New Process appears

Source |  |  |  |  |  |  |  |  |  |

**B** | *I* | U | ~~S~~ |  $x_2$  |  $x^2$  |  |  $I_x$  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

EPC will automatically assigns the selected Process Set or Process as the Parent. This can be changed on “Select a Parent” if needed.

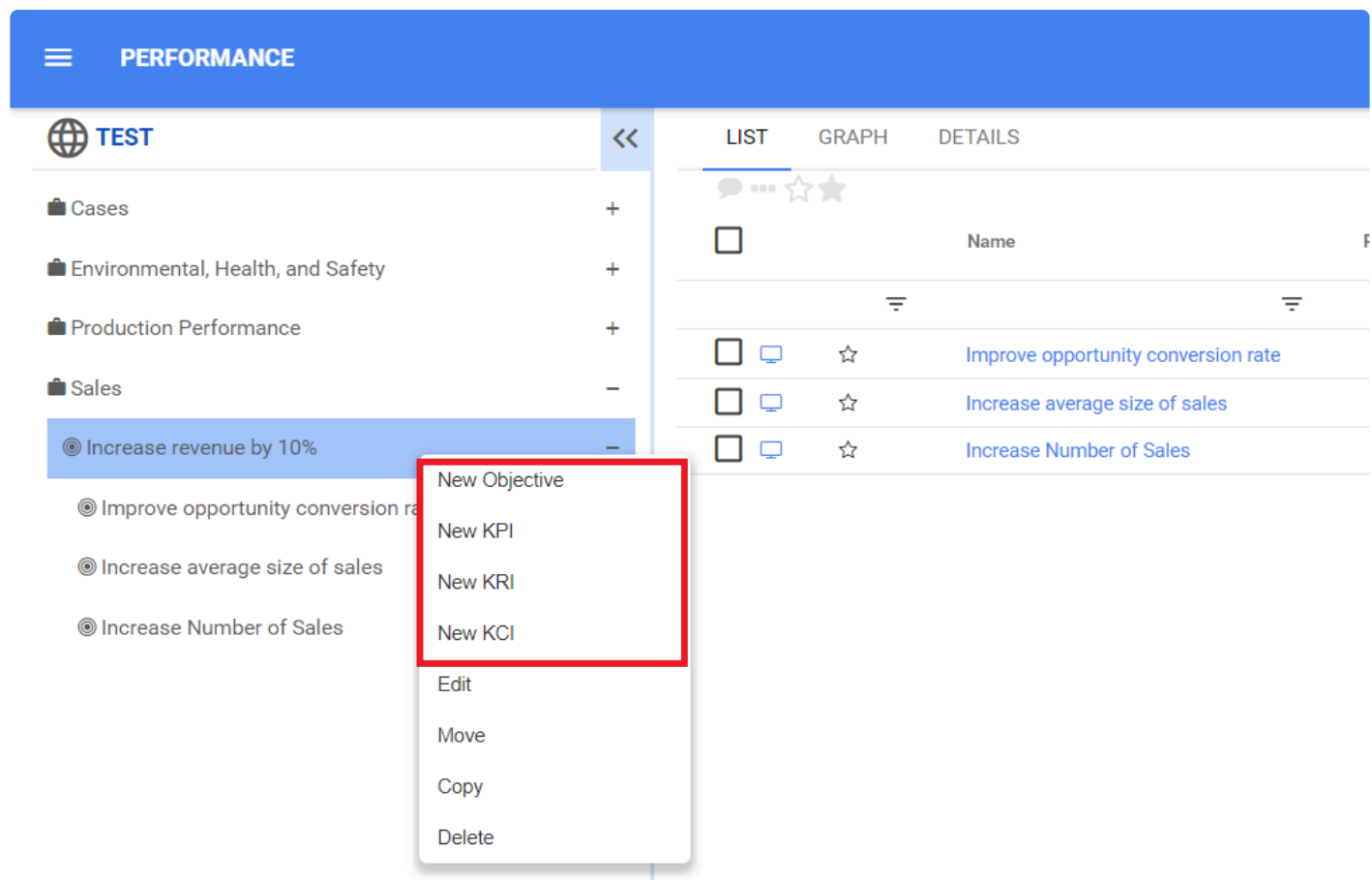
# Right-Click – Object Creation

## Functionality

EPC has created a new option on right click on the three of a module to facilitate and make faster the creation of object. Now, modelers can create new objects by just pressing right click on a object in the three.

## How it works

Users selects an object on the tree of a module to see the extended list of Right Click. Then click on New object. In our example we can select objects: objective, KPI, KRI, and KCI. This will vary depending of the module.



Then the form to create the new object appears. Allowing the user to be faster when creating new objects.

Editing Language

ENGLISH

→

GENERAL	PROPERTIES
---------	------------

Add &amp; Close

—

What is the name?

Increase revenue by 10%

Select a Parent

What is the unique identifier?

[illegible]

+



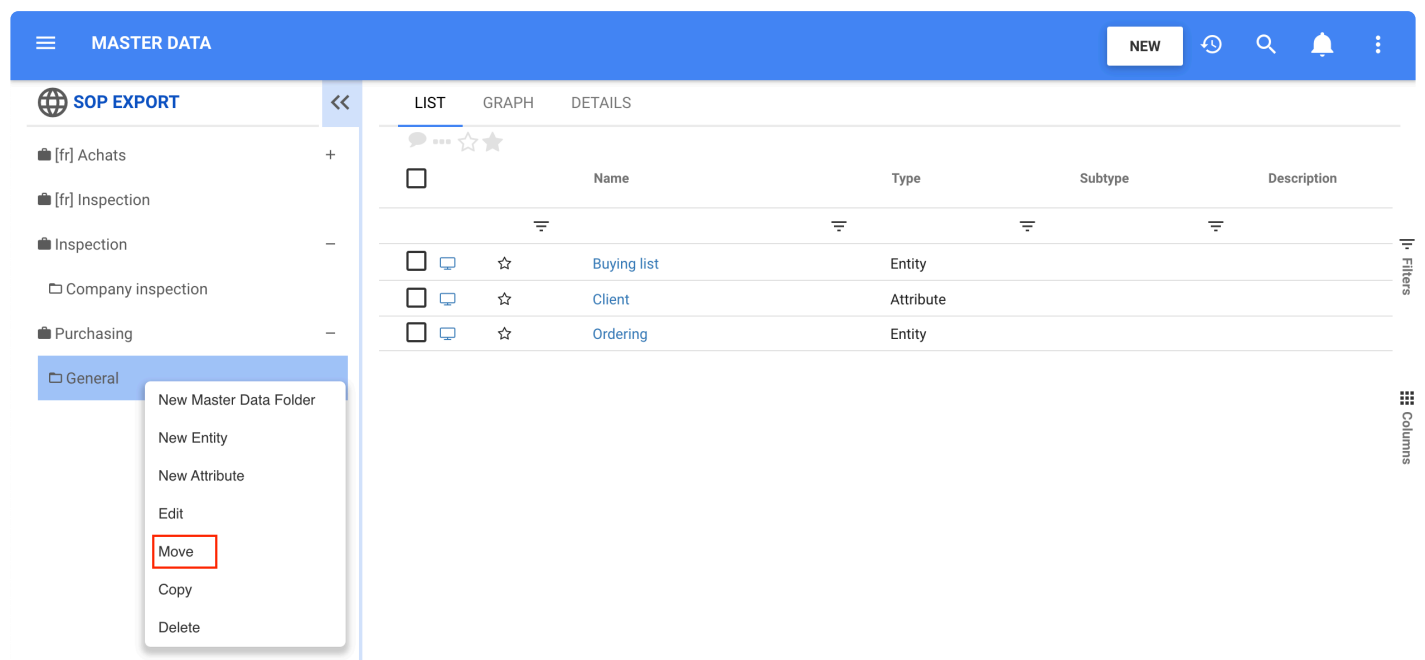
# Right-Click – Move

## Functionality

Another addition, is the move option, this feature allows modelers to move objects on the tree to new parents by right-clicking on them. This feature helps modelers to organize and structure the tree of a module faster.

## How it works

Users selects an object in the tree, then right-clicks and select Move from the dropdown menu.



Next, a new window opens with a tree, where users can select the parent to which the object will be moved.

Select a Parent

Type to Search

[fr] Achats	+
[fr] Inspection	
Inspection	+
Purchasing	+

Cancel

Move

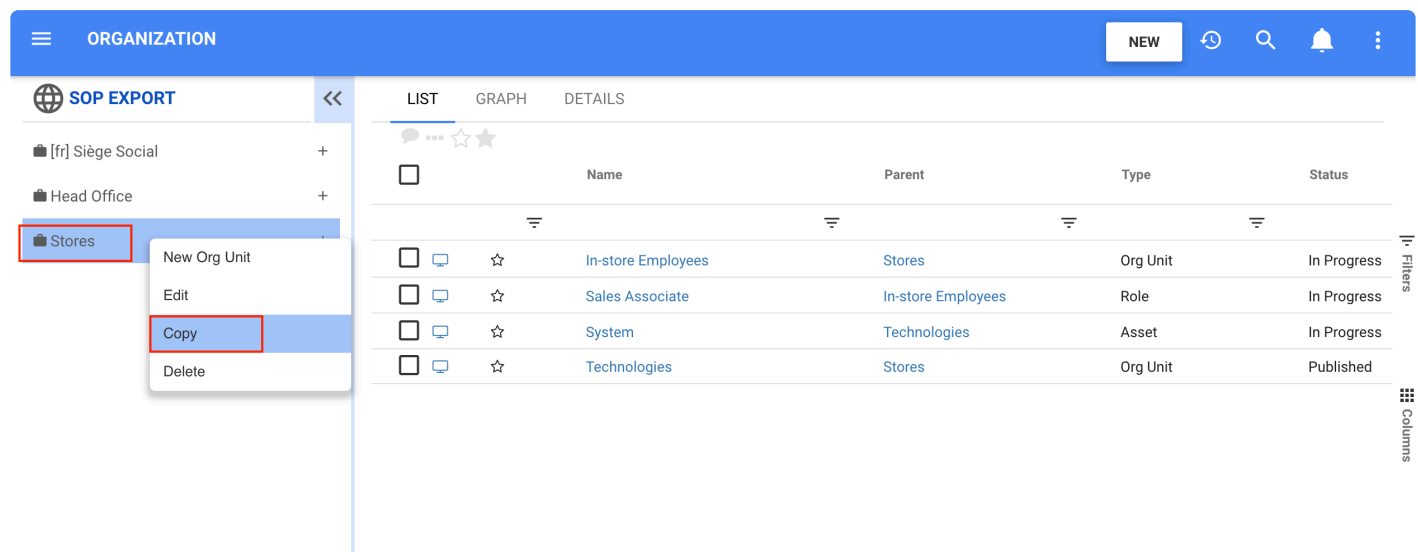
# Right-Click – Copy

## Functionality

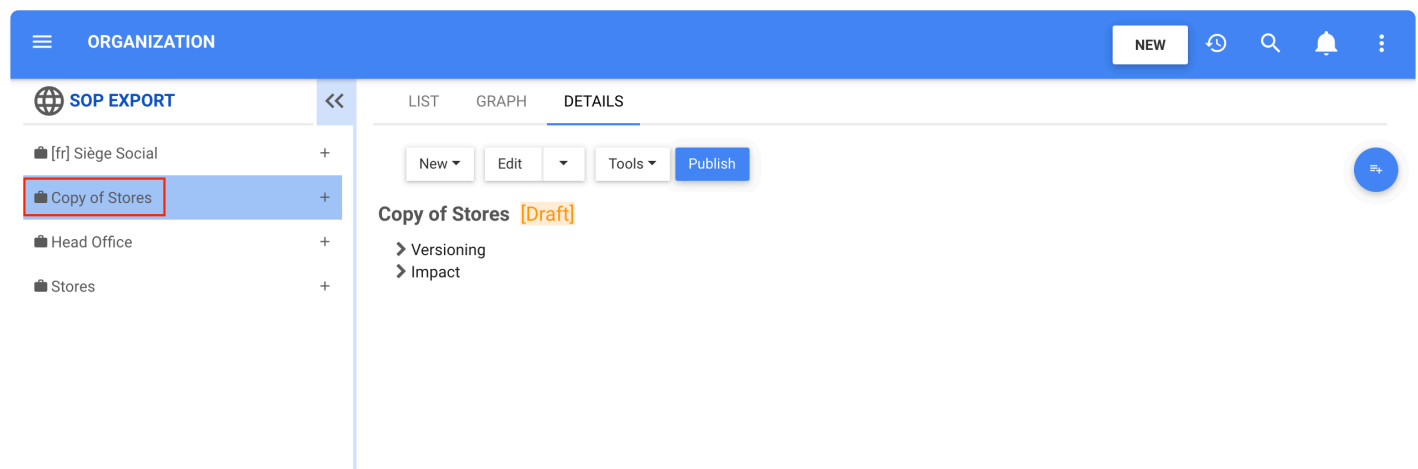
Another addition, is the copy option, this feature allows modelers to copy objects on the tree by right-clicking on them. This feature helps modelers to copy objects and locate them where required, making it easy to copy and organize the tree of a module.

## How it works

On the tree of a module, select the object to be copy then right-click on it and select Copy from the dropdown menu.



If users are copying a set then a copy of the set is created.



If the user is copying other object in the tree then the window opens with the tree to select where the copy

should be created. the user click in paste then the item is created.

×

## Select a Parent

Type to Search

[fr] Siège Social	+
Head Office	+
Stores	+

Cancel

Paste

# Capability Management Module

---

## Functionality

EPC has added the optional Capability module to users, this module enables companies to represent a high-level view of their organization from the perspective of business capabilities that, in essence, briefly describe everything their organization can do.

While EPC's core module, the Process module, defines "how" things are done, the Capability module is used to define "what" the company does at its core.

Business Capability is the expression or articulation of the capacity, materials, and expertise that an organization needs to perform core functions. Enterprise architects use business capabilities to illustrate overall business needs in order to better strategize IT solutions that meet those business needs. Capability Maturity Model Integration (CMMI) is a process and behavioral model that helps organizations streamline process improvement and encourage productive and efficient behaviors that decrease risks in software, product, and service development.

## Customization

Capability has the same page layout as the other modules in EPC, tabs LIST, GRAPH, and DETAILS are available.

In this new module, users can:

- access Capability through the main menu
- create capability on the NEW button, and define its GENERAL information, PROPERTIES, and ANALYSIS of the objects
- edit GENERAL information, PROPERTIES, and ANALYSIS of capability objects
- find the capability by using the Search Bar
- edit Capability options through Environment and System Admin Settings
- create additional attributes in the system
- upload templates for Capability modules
- download a capability book, this document is a summary of the information of the selected capability.
- copy and paste capability objects
- move objects in the tree
- import/ export capabilities
- see the value assign to each capability by their color in Hierarchy Graph

## How it works?

To access this new module, users can find it in the main menu. In the tree of the capabilities module, the sets are displayed and within them the capabilities that have been created.

←
**CAPABILITY**

- To Do
- Process
- Documents
- Performance
- Organization
- Risk
- Control
- Rule
- Master Data
- Capability
- Glossary
- Collaboration
- Governance

<<

LIST
GRAPH
DETAILS

			Parent
			[en] Manage Banking Accounts
			[en] Banking Capability Set
			[en] Health care capabilities set
			[en] Health care capabilities set
			[en] Copy of [fr] Test
			[en] Manage Banking Accounts
			[en] Copy of Clinical Management ir
			[en] Clinical Management inside Ho
			[en] Copy of [fr] Test
			[en] Banking Capability Set
			[en] Manage Banking Accounts
			[en] Manage Banking Accounts

# Create Capability Set and Capability

---

## Functionality

In the new Capability module in EPC, users can create a new set, capability and sub-capability from the button NEW on top of the page and in details page. This allows modelers the flexibility to create content on its capability module in different places.

## Customization

When users create a new capability, a form appears to allow user to set relationships with the other modules, add properties, and set values to the capabilities to facilitate the analysis.

### GENERAL

- What is the Capability?
- What are the responsibilities?
- Select Process Relationship?
- Select document Relationship?
- Select Performance Relationship?
- Select Organizational Relationship?
- Select Asset Relationship?
- Select Role Relationship?
- Select Resources Relationship?
- Select Business Rule Relationship?
- Select Risk Relationship?
- Select Control Relationship?

### PROPERTIES

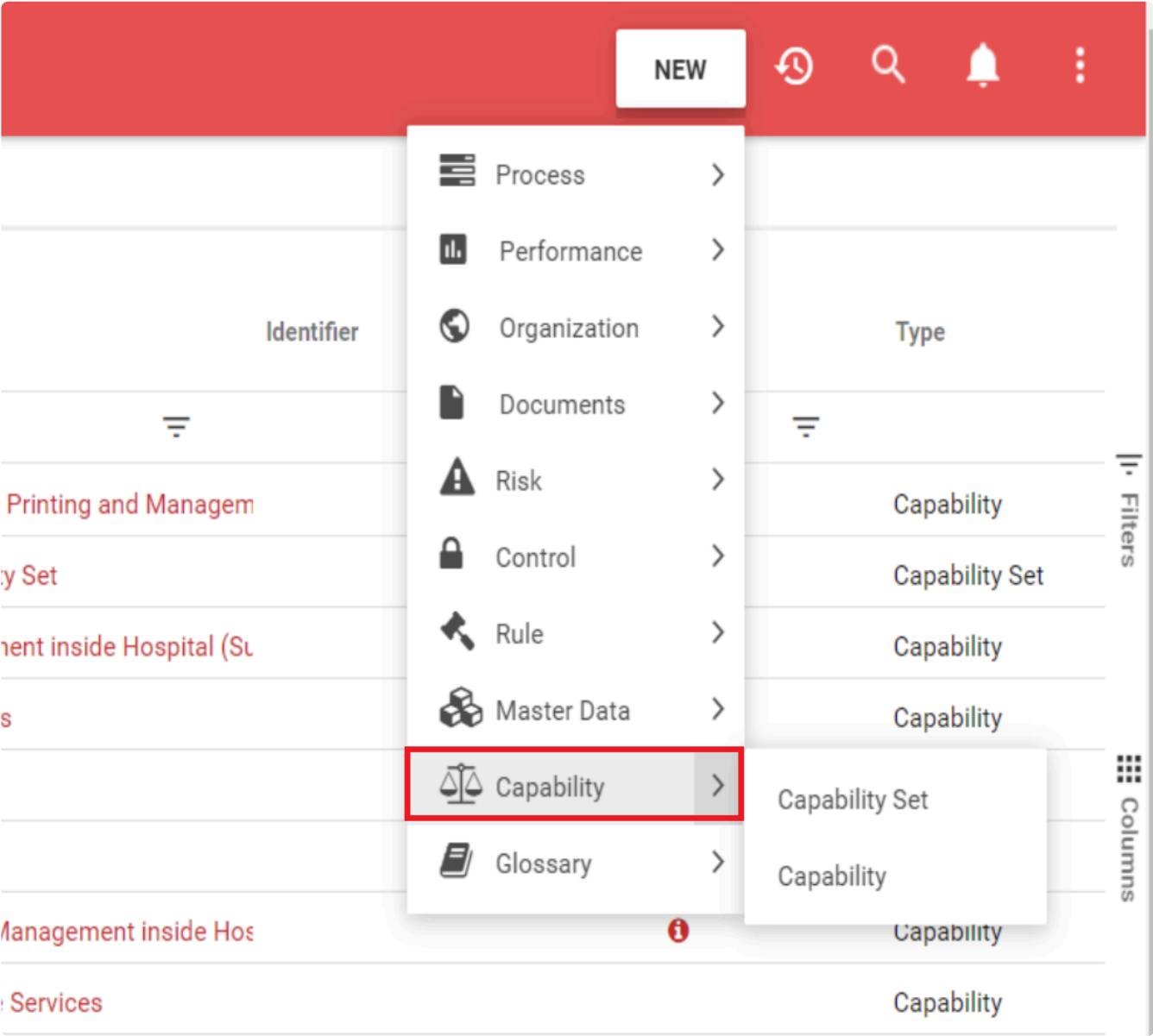
- What type of Capability is this?
- Which Categories are applicable?
- What are the Attributes?

### ANALYSIS

- Status
- Business Value
- Technical Health
- Importance to Strategy
- Competitive positioning
- SWOT analysis
- Maturity

## How it works

To create new set or Capability, users can click on the button NEW on top of the page, then hover over the arrow next to Capability and create a Capability set or capability.



Once the Add New Capability form opens, users have three tabs: GENERAL, PROPERTIES, and ANALYSIS. To expand each of the sections in the tabs, users click on the + on the right side of the title of the sections.

In GENERAL tab, users can define the capability and the relationships. Users can create relationships with process, document, performance, organization, asset, Role, resource, rule, risk, control.



## Add New Capability

Editing Language

NEDERLANDS

x

GENERAL

PROPERTIES

ANALYSIS

Create Capability &amp; Close

What is this Capability?	+
What are the Responsibilities?	+
Select Process Relationship	+
Select Document Relationship	+
Select Performance Relationship	+
Select Organizational Relationship	+
Select Asset Relationship	+
Select Role Relationship	+
Select Resource Relationship	+
Select Business Rule Relationship	+
Select Risk Relationship	+
Select Control Relationship	+

In PROPERTIES, users can define the type, category and attributes of the capability.

## Add New Capability

Editing Language

NEDERLANDS

x

GENERAL

PROPERTIES

ANALYSIS

Create Capability &amp; Close

What type of Capability is this?	+
Which Categories are applicable?	+
What are the Attributes?	+

In ANALYSIS, users can give a value of the capability in Business Value, Technical Health and Importance to Strategy. As well as, creating SWOT analysis and define the maturity of the process.

## Add New Capability

Editing Language

NEDERLANDS

x

GENERAL

PROPERTIES

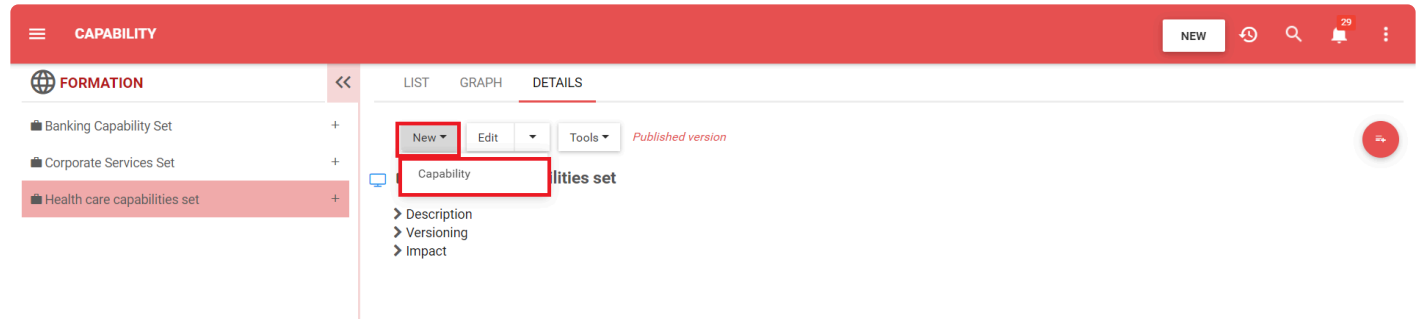
ANALYSIS

Create Capability &amp; Close

Status	UNDEFINED						
Business Value	Undefined	Below Average	Average	Above Average			
Technical Health	Undefined	Low	Medium	High			
Importance to Strategy	Undefined	Not Important	Important	Very Important			
Competitive Positioning	UNDEFINED						
SWOT Analysis	Strengths		Weaknesses				
	Opportunities		Threats				
Maturity	Maturity Current Level	Next Maturity Target Date	Level 1 Target Date	Level 2 Target Date	Level 3 Target Date	Level 4 Target Date	Level 5 Target Date
	0						

Finally, Users click on Create Capability and close, then the capability will be created in the selected parent on the tree of the capability module.

Additionally, users have the option to add a new capability or sub-capability in DETAILS page. by clicking in New button and by right clicking on a set or capability in the module tree.



# List Page – Capability

## Functionality

In the new Capability module in EPC, users have LIST page. There, users can view additional key information regarding specific process and sub-process details. Also, users can personalize the information being displayed by changing the order, adding and removing columns and filtering the information. This features make this page easy to use and customize, because it adapts to the needs of the user.

## Customization

List view allows you to see all capabilities that you have access to, including the specific details within them. Viewing capabilities in a list allows users to have a quick view of various capabilities and associated objects, facilitating navigation.

List view allows users to Collaborate with colleagues, Action Over a Batch of objects, favorite or unfavorite objects in the list.

Also, it provides a variety of **Filtering** and **Sorting** options, allowing users to easily find desired capabilities. These features are used to organize the items in the List View.

## Filters

The EPC Web App provides users with 3 major filtering settings:

List	Description
1. No hierarchy filter	A list view where <b>all</b> items within the given module are listed
2. Current level & below	A list view where <b>all levels below</b> the selected item are listed
3. Current level	A list view where <b>1-level below</b> the selected item are listed

## List of Components

Component	Description
Favorite	Allows users to sort by favorites vs. non-favorites
Parent	Textual search for any existing name of an object
Name	Textual search for any existing name of an object
Identifier	Textual search for any existing unique identifier of an object
Description	Whether or not there is a Description inputted for the item in question
Type	The type of the object

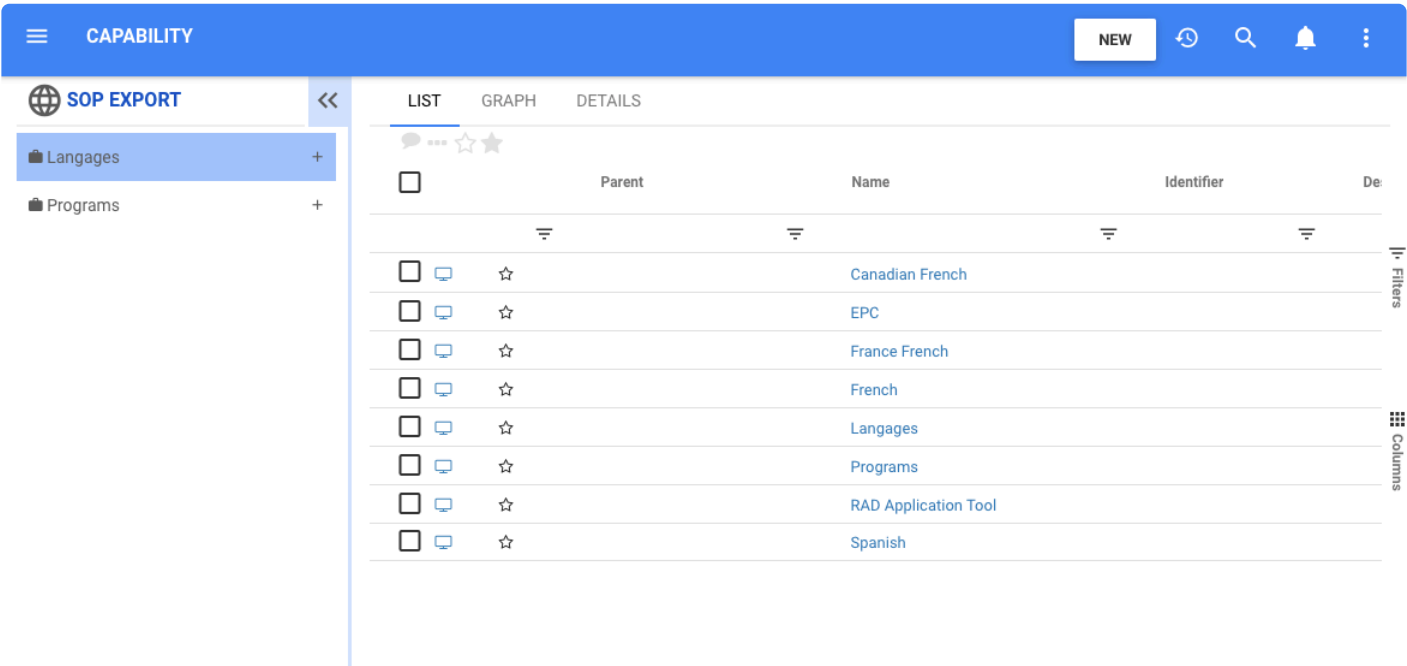
<b>My RASCI-VS</b>	The RASCI-VS associations existing on the item in question
<b>Processes</b>	Whether or not there are processes directly associated with the item in question
<b>Documents</b>	Whether or not there are Documents directly associated with the item in question
<b>Objectives</b>	Whether or not there are objectives directly associated with the item in question
<b>KCI</b>	Whether or not there are KCIs directly associated with the item in question
<b>KPI</b>	Whether or not there are KPIs directly associated with the item in question
<b>KRI</b>	Whether or not there are KRI directly associated with the item in question
<b>Org Units</b>	Whether or not there are Org Units directly associated with the item in question
<b>Roles</b>	Whether or not there are Roles directly associated with the item in question
<b>Resource</b>	Whether or not there are Controls directly associated with the item in question
<b>Asset</b>	Whether or not there are Assets inputted for the item in question
<b>Risk</b>	Whether or not there are Risks directly associated with the item in question
<b>Control</b>	Whether or not there are Controls directly associated with the item in question
<b>Rule</b>	Whether or not there are Rules directly associated with the item in question
<b>Categories</b>	Whether or not there are Categories directly associated with the item in question
<b>Attributes</b>	Whether or not there are Attributes directly associated with the item in question
<b>Capability Status</b>	The status of the object (Supported / Not Supported / Required / Phase Out / End of Life / Undefined)
<b>Business Value</b>	The business values of the capability (Below Average/Average/Above Average/ Undefined)
<b>Technical Health</b>	The technical health of the capability (Low/ Medium/ High/Undefined)
<b>Importance to Strategy</b>	The important to strategy of using this capability (Not Important/ Important / Very Important /Undefined)
<b>Competitive Positioning</b>	The competitive position of this capability (Ahead / At Par / Lagging/Undefined)
<b>Modified Date</b>	The last date that the object in question was modified
<b>Last Modified By</b>	The name of the last resource that modified the object
<b>Status (Available in Show Latest)</b>	View the status of the item in question (Published vs. in-progress)
<b>Locked</b>	Whether the item in question is currently locked or not

## Columns

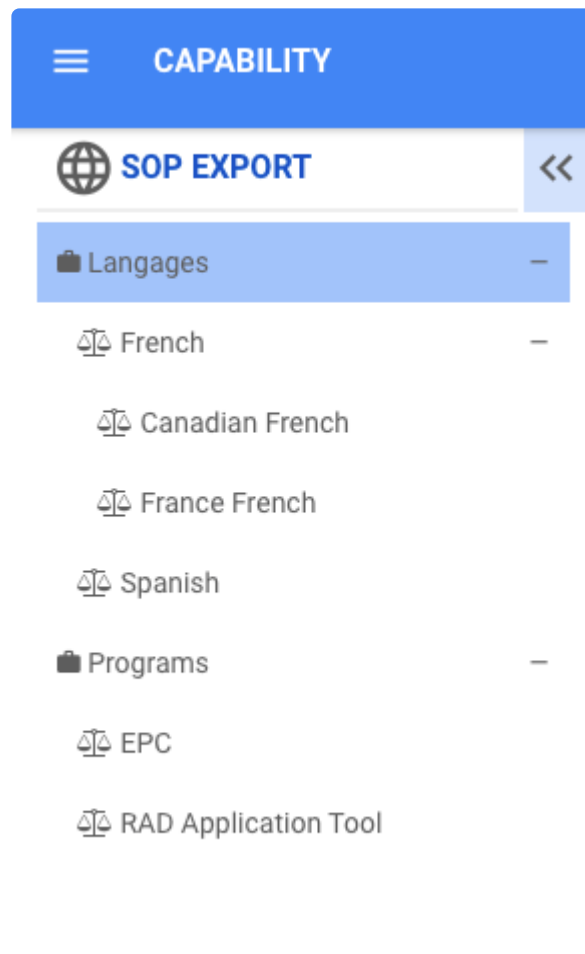
This feature allows users to select which columns to display. The columns can be saved for the module, environment or have the default column in EPC.

# How it Works

To use this feature, users navigate to Menu Button on the top left of the screen and select Capability Module.



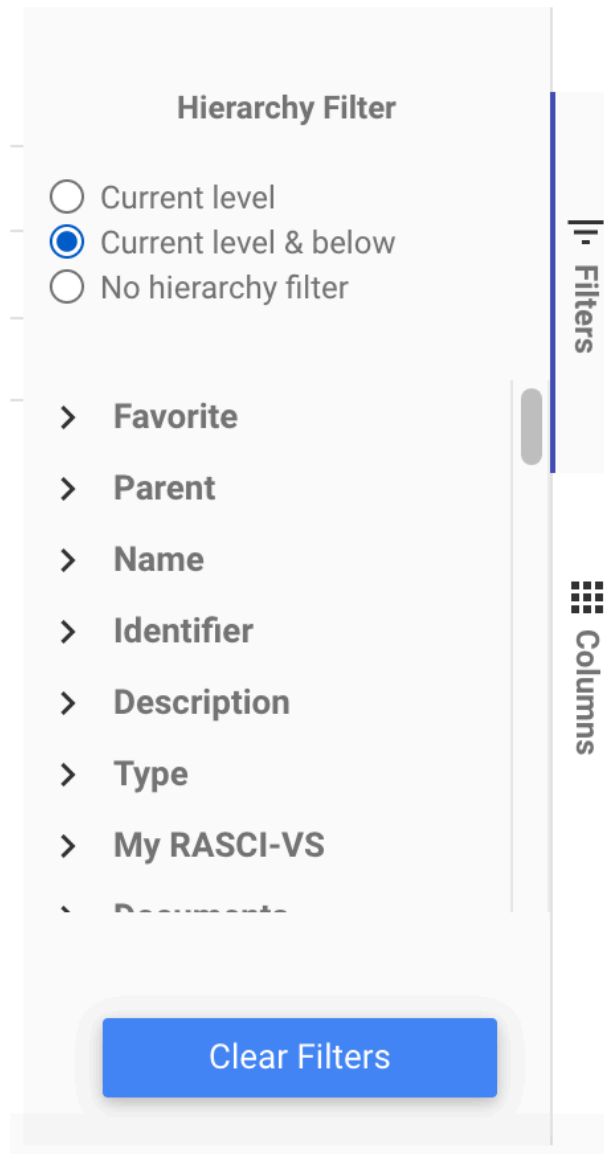
The tree of Capability Module opens, then users can select a set, or expand them by clicking on the + next to the them. When accessing the modules the page is automatically in LIST view. when selecting objects on the list, user can go back to list view by clicking on tab LIST.



Also, users can use Filters button to chose the information to be displayed.



To view sub-capabilities, users select the filter panel and then select “Current level & below” of the EPC Web App.



Columns allow users to select which columns to display. The columns can be saved for the module, environment or have the default column in EPC.



**CAPABILITY** NEW

**SOP EXPORT** << LIST GRAPH DETAILS

Parent Name Identifier Description

<input type="checkbox"/>			
<input type="checkbox"/>	[fr] Anglais		
<input type="checkbox"/>	[fr] Capacité		
<input type="checkbox"/>	[fr] EPC		
<input type="checkbox"/>	[fr] Espagnol		
<input type="checkbox"/>	[fr] Langues		
<input type="checkbox"/>	[fr] Programmes		
<input type="checkbox"/>	[fr] RAD Outil d'Application		
<input type="checkbox"/>	Canadian French		
<input type="checkbox"/>	Capability		
<input type="checkbox"/>	EPC		

Filters Columns

Furthermore, users can:



Click on button Collaborate with colleagues to add collaborative task with colleagues.



Action Over a Batch of objects, users can publish, edit responsibilities, subscribe, unsubscribe, edit custom attributes, edit, delete and move multiple objects with this button.



favorite or unfavorite objects in the list.

**CAPABILITY** NEW

**SOP EXPORT** << LIST GRAPH DETAILS

Parent Name Identifier Description

<input checked="" type="checkbox"/>	[fr] Anglais		
<input checked="" type="checkbox"/>	[fr] Capacité		
<input type="checkbox"/>	[fr] EPC		
<input type="checkbox"/>	[fr] Espagnol		
<input type="checkbox"/>	[fr] Langues		
<input type="checkbox"/>	[fr] Programmes		
<input type="checkbox"/>	[fr] RAD Outil d'Application		
<input type="checkbox"/>	Canadian French		
<input type="checkbox"/>	Capability		
<input type="checkbox"/>	EPC		

Filters Columns

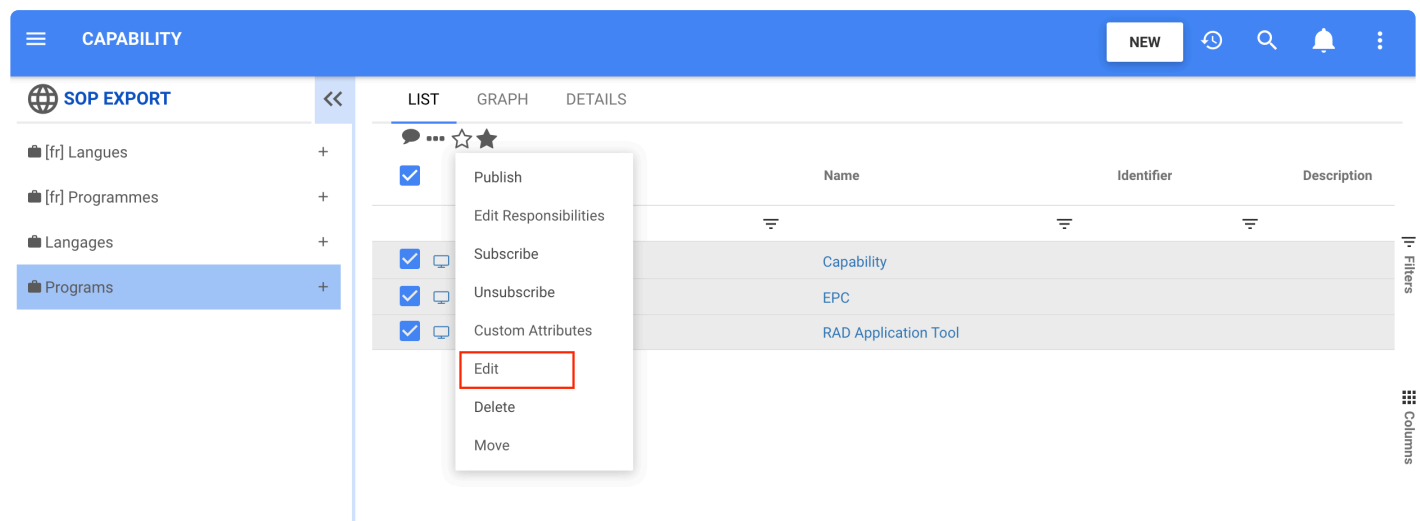
# Mass Update – Capability

## Functionality

In the new Capability module in EPC, modelers and system admin can easily edit and make changes to various objects with the mass update option on LIST page. This new option reduces the time needed to edit various object, facilitating the work of modelers.

## How it works

To use this feature, users have to be in LIST view. Then select the objects to be edited. This action activates the three-dots icon and when clicking on it a list extends with the option edit.



The **Edit Objects** form opens with two tabs: General information and Properties

Edit Objects

GENERAL

PROPERTIES

Save & Close

Select Process Relationship

+

Which Documents are used?

+

How is Performance measured?

+

Select Organizational Relationship

+

Select Asset Relationship

+

Select Role Relationship

+

Select Resource Relationship

+

Which Business Rules are applicable?

+

Which Risks are applicable?

+

Which Controls are applicable?

+

Cancel

Save & Close

Edit Objects

GENERAL

PROPERTIES

Save & Close

What type of Capability is this?

+

Which Categories are applicable?

+

Cancel

Save & Close

To save the changes users click on the **Save & Close** button.

# Graph Page – Capability

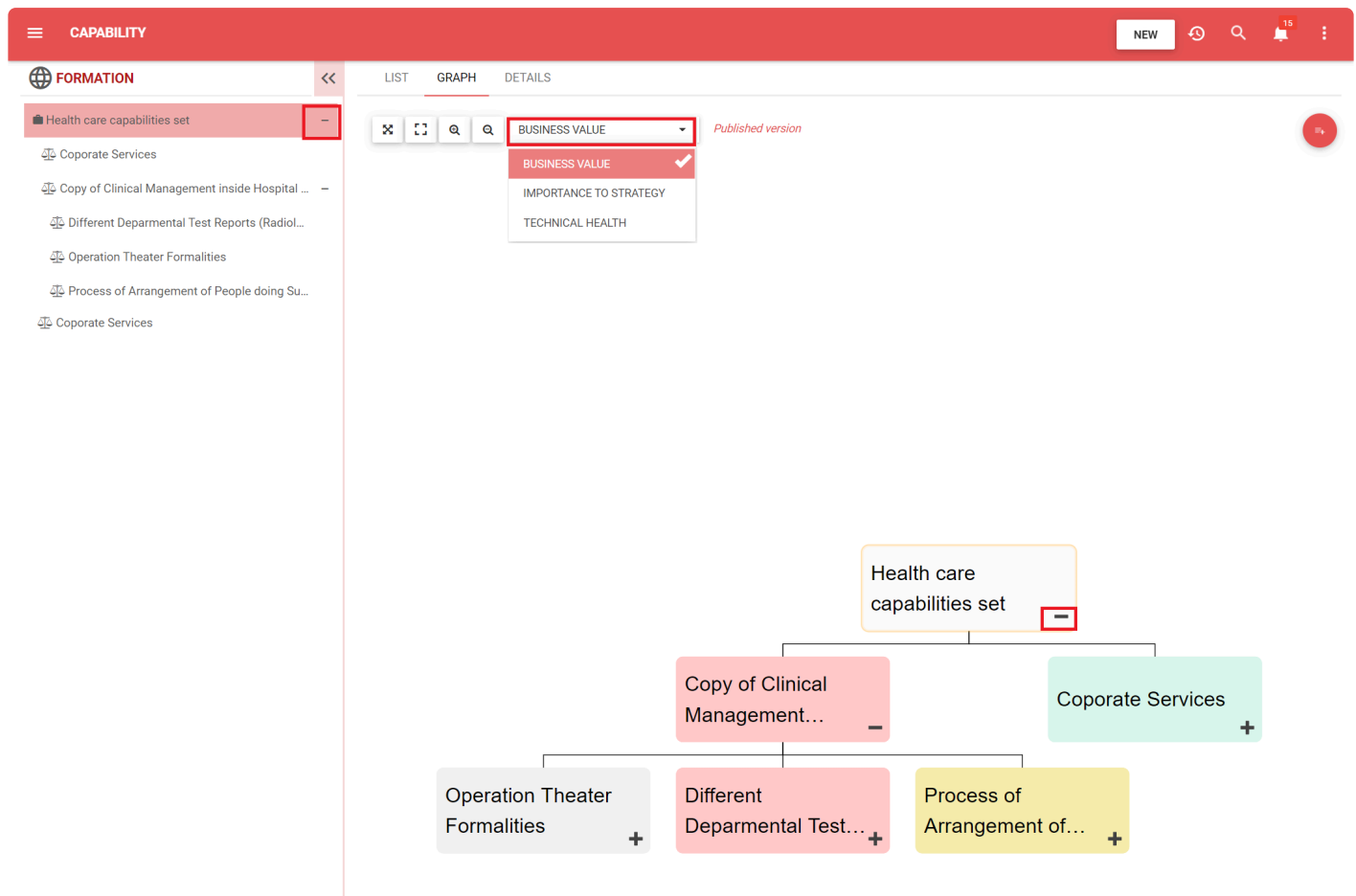
## Functionality

In the new Capability module in EPC, users have the Graph Page, there users find the hierarchy of the set, capabilities and sub-capabilities. Also, the hierarchy graph in capability highlights the importance given to each capability in Business Value, Importance to Strategy and technical Health. This makes easier for the analyst to review and analyze the capabilities of the processes.

## How it Works

To use this feature, when users are in Graph page, users select a set in capability tree. There, the box representing the set is display in the middle of the page. To view the capabilities in the set, users can click on the + in the tree or the graph. Then the capabilities inside of the set or the capability are shown.

In addition, users can view the technical health or importance strategy in the hierarchical chart by clicking on the arrow next to the business value to expand the list. There, users can select between technical health or importance strategy and business value.





Users can also, fit the graph to the page, set full screen and zoom in and out by clicking on the option on the top.

In Open button Menu, users have the option to print, favorite, share and subscribe and unsubscribe.



# Details page – Capability

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## Functionality

In the new EPC Capability module, users are provided with the DETAILS page. Here, users can see all the associations, properties and analysis of the object they have selected in the tree whether it is a capability set or a capability. This facilitates the overview of the capability characteristics.

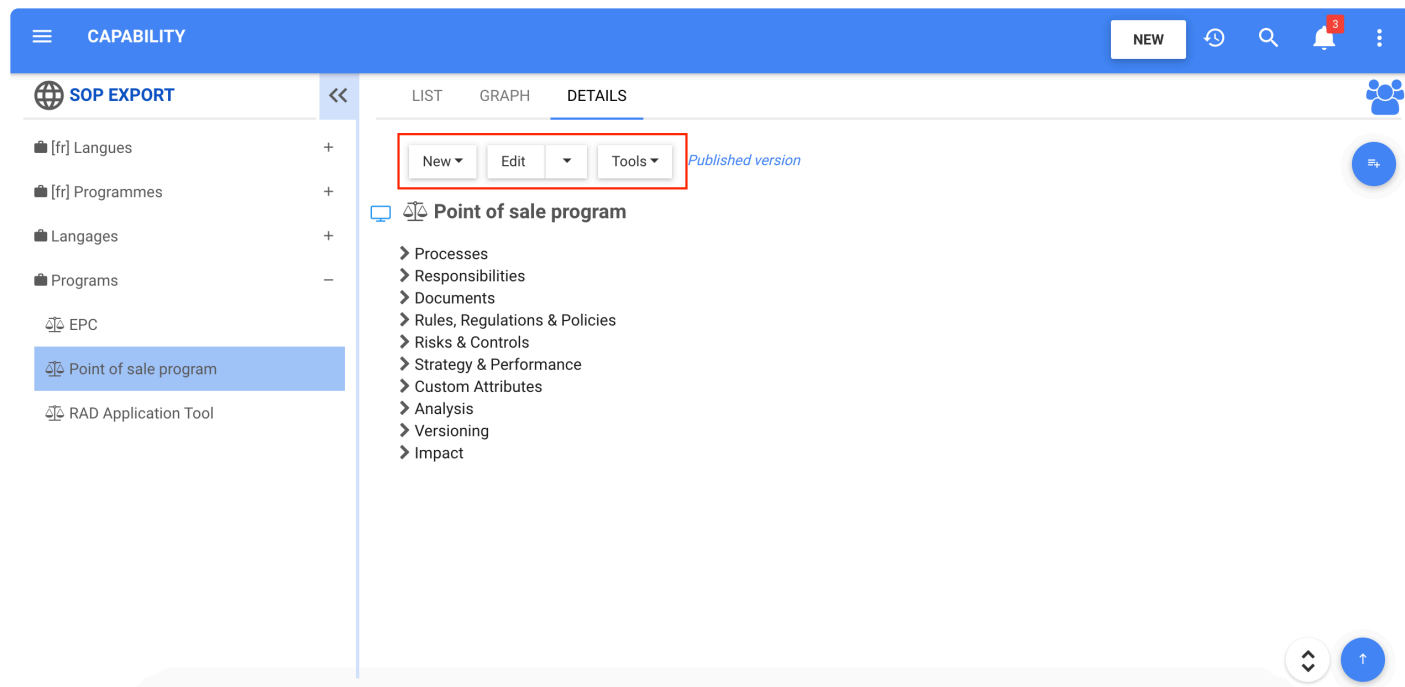
## Customization

Items included in the detail page if created

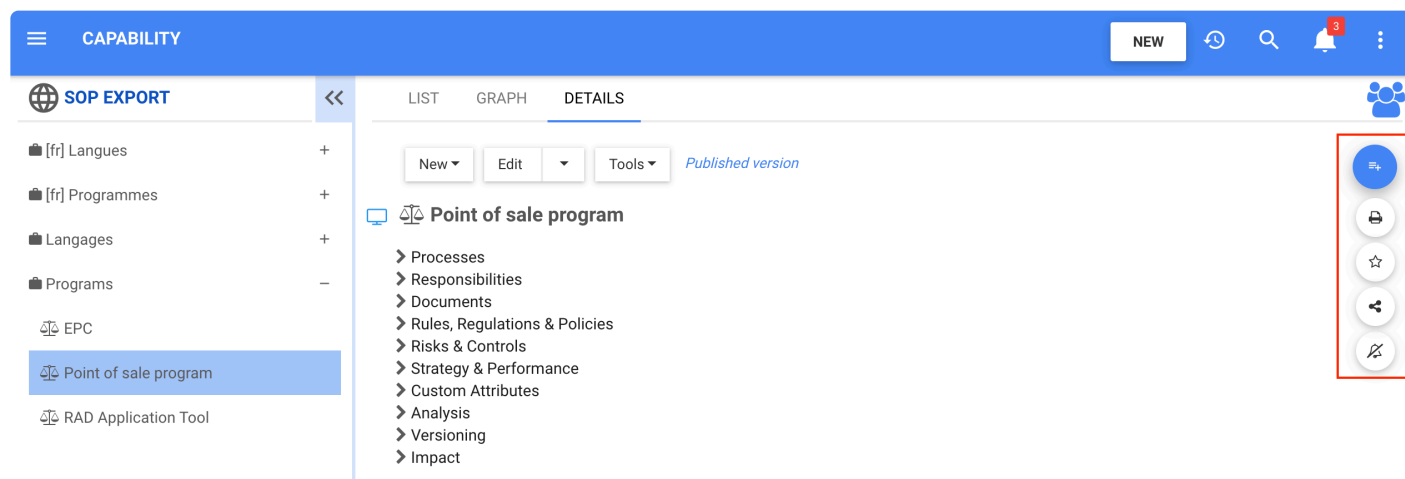
- Create new button
- Edit Button to Navigate to the Edit form
- Publish button (if the object is in draft mode and user has permission)
- In the dropdown selection next to Edit: approval, endorsement, security, move, copy and delete.
- Tools Button: audit trail and show changes.
- Open button menu: print, favorite. share and subscribe icon
- Details information in page:
  - Capability name, Unique Identifier , Description field
  - Responsibilities
  - Associations if they have been defined with Processes, Document, Performance, Rules, Regulations & Policies, Risks, and Controls.
  - Custom Attributes
  - Analysis
  - Versions details
  - Impact details

## How it works

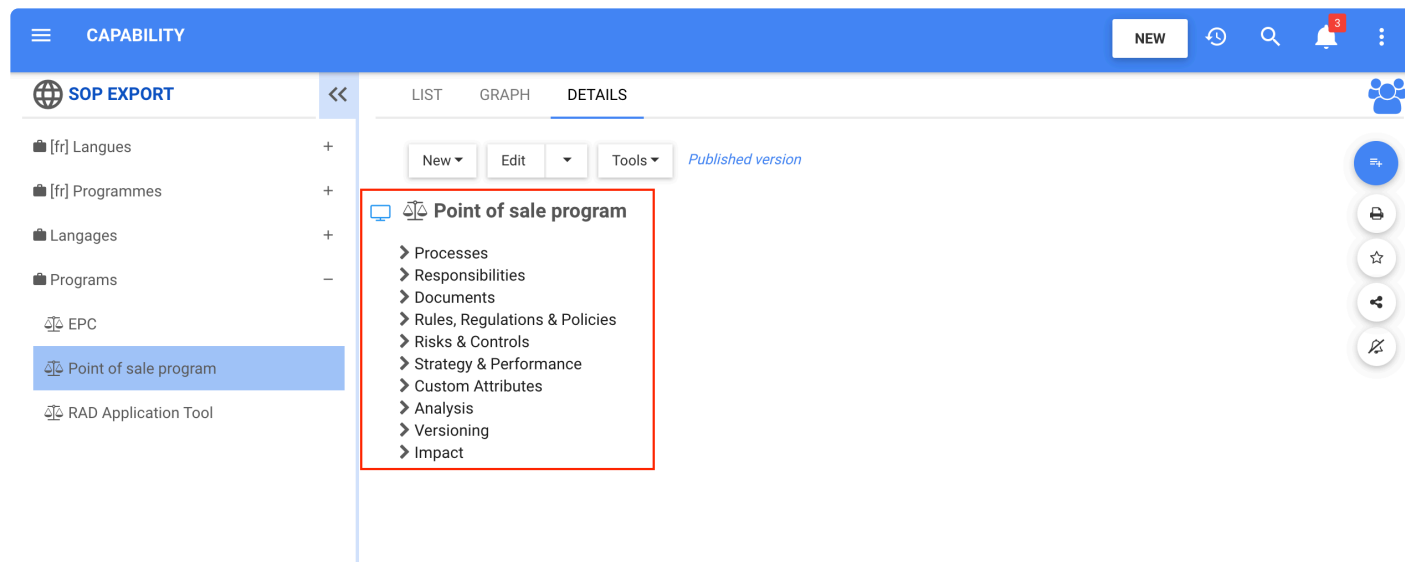
From the List page , select and click on a capability, navigate to the Detail page, then in the top of details page, users have the button new to create a new capability. A Edit button to make changes in the general information, properties and analysis of the capability. Also, the button next to edit allows the users to endorse, approve, edit Security, Move Copy and Delete. Tools button allows to see the audit trail ( supported by capability module) and show changes made. Additionally, users can use the button to publish if they have write permission and object is in draft mode.



The open button Menu in the top right corner, users can find print, share, favorite, subscribe and unsubscribe buttons.



If the capability is associated to other business objects, then users will be able to see all the information under the name of the object when expanding the respective section.



- In Processes, users can view the process associated to the capability and a link to preview the process
- Under users can see the description of the capability.
- In responsibilities section, where users can see the role group, the asset group, the org group and the resource group and the name of the RASCI and the responsibility of that RASCI
- In Documents, users can view the document associated to the capability, a preview icon, a download icon and a link to preview the document.
- In Rules Regulation & Policies, users can view the rule associated to the capability and a link to preview the object.
- In Risk and Controls, users can view the risks, Controls and risk analysis section information.
- In Strategy & Performance, users can view the objectives, KPI, KRI, KCI associated to capability. When user click on a object, then a preview menu will generate giving me additional information of the performance object
- In Associations, users can see asset, role, resource section, org unit section associate to the capability selected.
- In Custom Attribute, users can see its details in this section
- In Analysis, users can view the status of the capability, the maturity level, the business value, the technical health, the importance of strategy, the competitive positioning and the SWOT analysis
- In versioning section, users can view the current version, and the version history information.
- In impact section, users can view the impact table and all the relationship between this capability and its association

To expand the sections, users simply click on the arrow in the left side of the name of the section.



CAPABILITY

NEW ↺ 🔍 🔔 3 ⋮

SOP EXPORT

<<

[fr] Langues +

[fr] Programmes +

Langages +

Programs -

EPC

Point of sale program

RAD Application Tool

LIST GRAPH DETAILS

New Edit Tools Published version

Point of sale program

Processes

Create a Process for a Product

Develop Human Capital

release notes 12.3.2

Responsibilities

Documents

Rules, Regulations & Policies

Risks & Controls

Strategy & Performance

Custom Attributes

Analysis

Status Supported

Business Value Average

Technical Health Low

⋮

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# Edit – Capability

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## Functionality

In the new Capability module in EPC, modelers and system admin can easily edit capabilities to change relationships with the other objects, add properties, and set values to the capabilities to facilitate the analysis.

## Customization

When users Edit a capability, a form appears to allow user make changes on:

### GENERAL

- What is the Capability?
- What are the responsibilities?
- Select Process Relationship?
- Select document Relationship?
- Select Performance Relationship?
- Select Organizational Relationship?
- Select Asset Relationship?
- Select Role Relationship?
- Select Resources Relationship?
- Select Business Rule Relationship?
- Select Risk Relationship?
- Select Control Relationship?

### PROPERTIES

- What type of Capability is this?
- Which Categories are applicable?
- What are the Attributes?

### ANALYSIS

- Business Value
- Technical Health
- Importance to Strategy
- Competitive Positioning
- SWOT analysis
- Maturity

In GENERAL, users can edit the capability and the relationships.

In PROPERTIES, users can edit the type, category and attributes of the capability.

Edit Capability

Editing LanguageENGLISH

×

GENERAL

PROPERTIES

ANALYSIS

Save & Close

What type of Capability is this?

+

Which Categories are applicable?

+

What are the Attributes?

+

In ANALYSIS, users can give a value of the capability in Business Value, Technical Health and Importance to Strategy. As well as, editing the value of Competitive Positioning, make changes to SWOT analysis and edit the maturity of the process.

Edit Capability

Editing LanguageENGLISH

×

GENERAL

PROPERTIES

ANALYSIS

Save & Close

Status

UNDEFINED

▼

Business Value

Undefined

Below Average

Average

Above Average

Technical Health

Undefined

Low

Medium

High

Importance to Strategy

Undefined

Not Important

Important

Very Important

Competitive Positioning

UNDEFINED

▼

SWOT Analysis

Strengths

+

Weaknesses

+

Opportunities

+

Threats

+

Maturity

Maturity

Current Level

Next Maturity

Target Date

Level 1

Target Date

Level 2

Target Date

Level 3

Target Date

Level 4

Target Date

Level 5

Target Date

0

Finally, Users click on Save and Close to save changes.

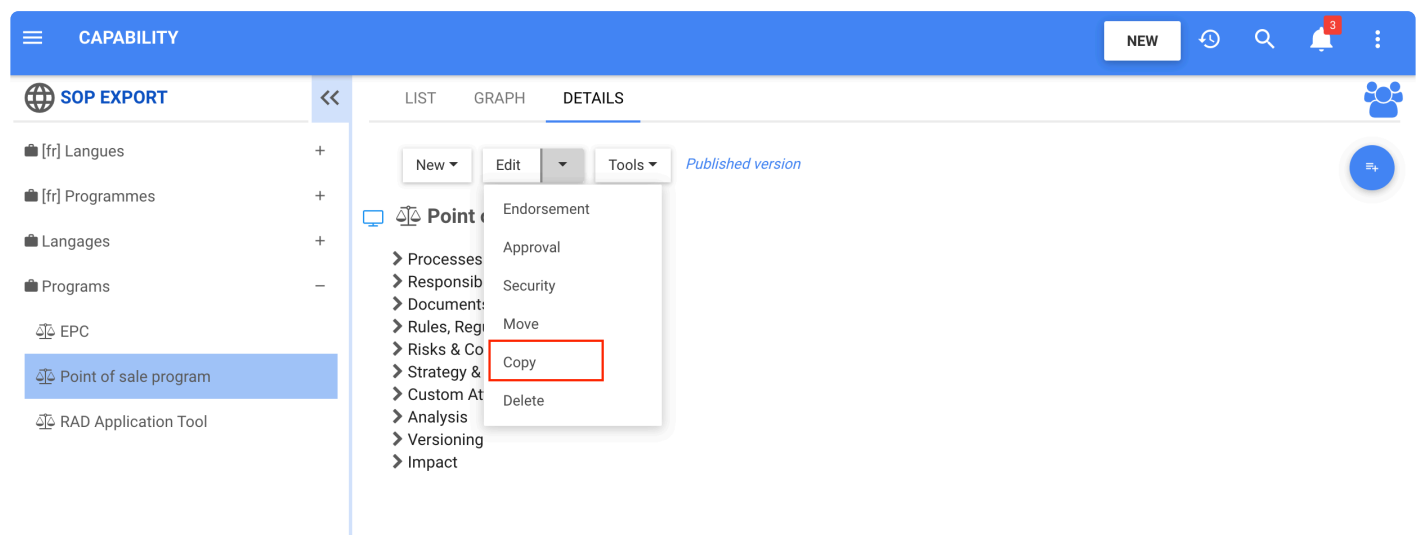
# Copy/Paste – Capability

## Functionality

In the new Capability module in EPC, modelers and system admin can easily Copy and Paste a capability sets a capability and sub capabilities.

## How it Works

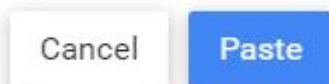
To use this feature, navigate to the Graph or Details page of the object you wish to copy. Then click on the **Edit** dropdown and select the **Copy** option from the dropdown menu.



Select the logical parent where you wish to Paste the object.



Click on Paste button.



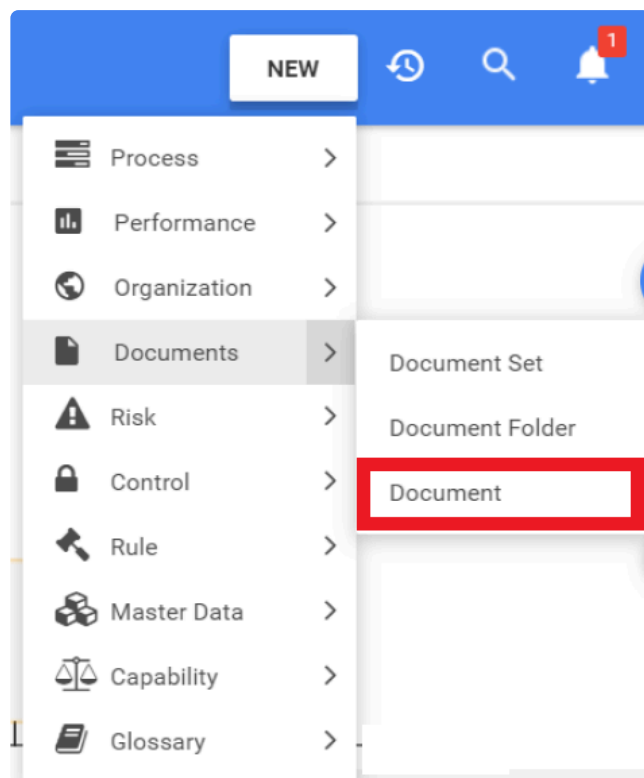
# Object Book – Capability

## Functionality

In the new Capability module in EPC, users can create template for Capability module and then be able to download the object book with the information of the capability set in the template. This feature allows users to upload a customize template to be use in the capability module.

## How it works

To upload the template for capability module, click on new, select Documents and then select Document from the list.



A form will open, add the information needed, in Type select template, mark the checkbox of Capability and upload the template.

**New Document** Editing Language ENGLISH +

**GENERAL** **PROPERTIES** Add & Close

**What is this Document?**

Name \*  What is the name?

Parent \*  Select a Parent

Unique Identifier  What is the unique identifier?

Description

Source

Format

Font Size

Type URL File Link Document Upload Wiki Generated from Template Template

Applicable to Process Organization Risk Performance Capability Control Document Master Data

[Choose or drag file\(s\) here](#)

**What are the Responsibilities?**

**Which Documents are used?**

To Download the object book of the selected capability. user can go to DETAILS page and then click in the Icon of Object book.

**CAPABILITY**

**ROMR**

00-romr -

01-romr +

cpblt-01

capability-set-02 +

**LIST** **GRAPH** **DETAILS**


New Edit Tools Published version


**01-romr**

- Processes
- Description
  - eeesdsdds
- Associations
- Custom Attributes
- Analysis
- Versioning
- Impact

Also, users can also download the object book from GRAPH page.



 **CAPABILITY**

 **ROMR**

00-romr

capability-01

capability-01-01

capability-01-02

capability-01-03

capability-01-04






capability-02

test-01

LIST

GRAPH

DETAILS



*Published version*

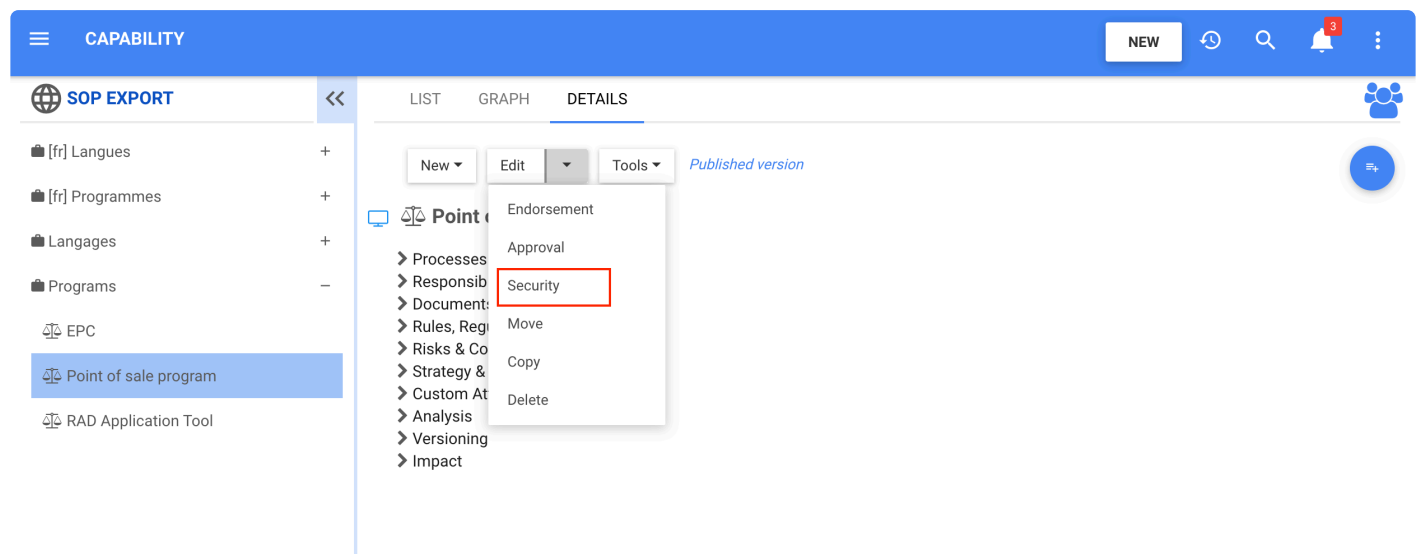
# Object Security – Capability

## Functionality

In the new Capability module in EPC, users can edit the security of the objects. This feature, allows System Admins and Modelers to edit and control who has the permission to create, read, update or delete information in this modules.

## How it Works

To use this feature, Users go to Page Details of the capability, then click on the drop down button of next to Edit. The extended list opens, select Security option.



Configure the permission and click Done.

### Edit Security of: Point of sale program

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    Type to Find a user or role

Name	Type	Full Control Allow	Write Delete Allow	Write Allow	Read Allow	Show Latest Allow	Full Control Deny	Write Delete Deny	Write Deny	Read Deny	Show Latest Deny
Administrator (epcadmin)	USER	<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 type="checkbox"/>
Marie Brulotte (marie.brulotte)	USER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Done

Permission	Meaning
Full Control Allow	User has Write/Delete, Write, Read and Approval permissions on the object (and its children)
Write Delete Allow	User has Write/Delete, Read permissions and can be granted Approval permissions on the object (and its children)
Write Allow	User has Write permissions and can be granted Approval permissions on the object (and its children)
Read Allow	User simply has Read permissions and can be granted Approval permissions on the object (and its children)
Show Latest Allow	User is allowed to view EPC objects in show latest
Full Control Deny	User is fully denied to all EPC objects
Write Delete Deny	User has denied Write/Delete, they can still Read and Write on the object (and its children), and could be granted Approval permission
Write Deny	User has denied Write, they can still Read the object (and its children), and could be granted Approval permission.
Read Deny	User has been denied Read, they cannot see the object, nor be granted Approval Permission
Show Latest Deny	User has been denied to view EPC objects in show latest

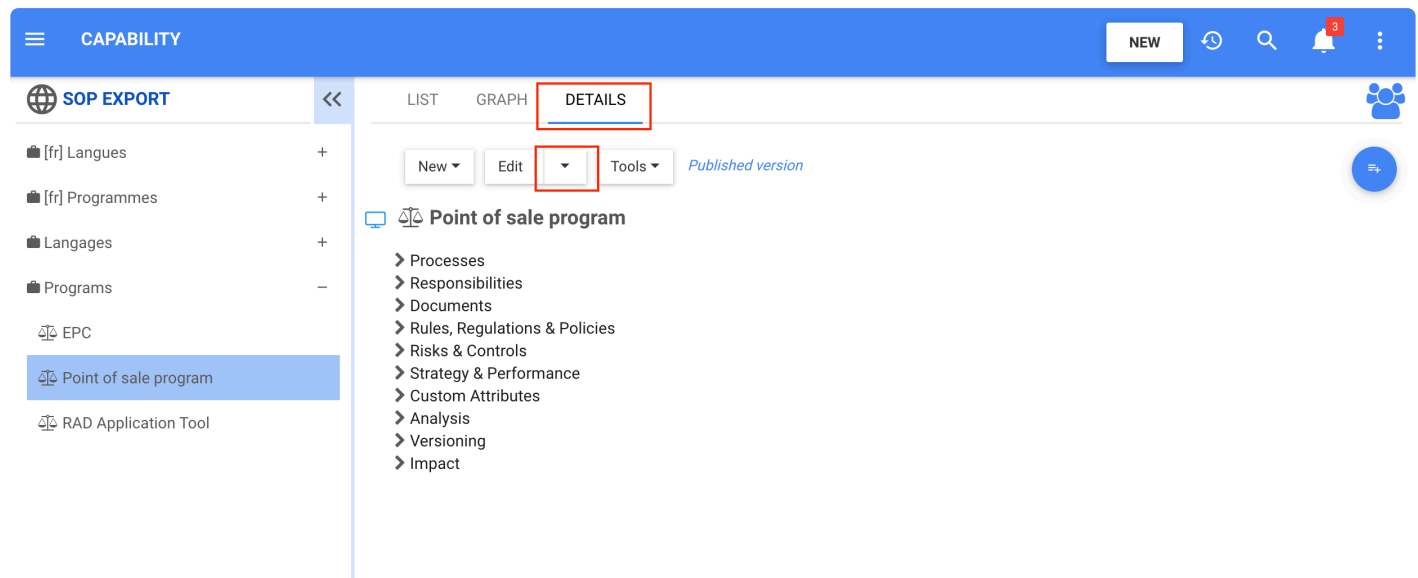
# Move – Capability

## Functionality

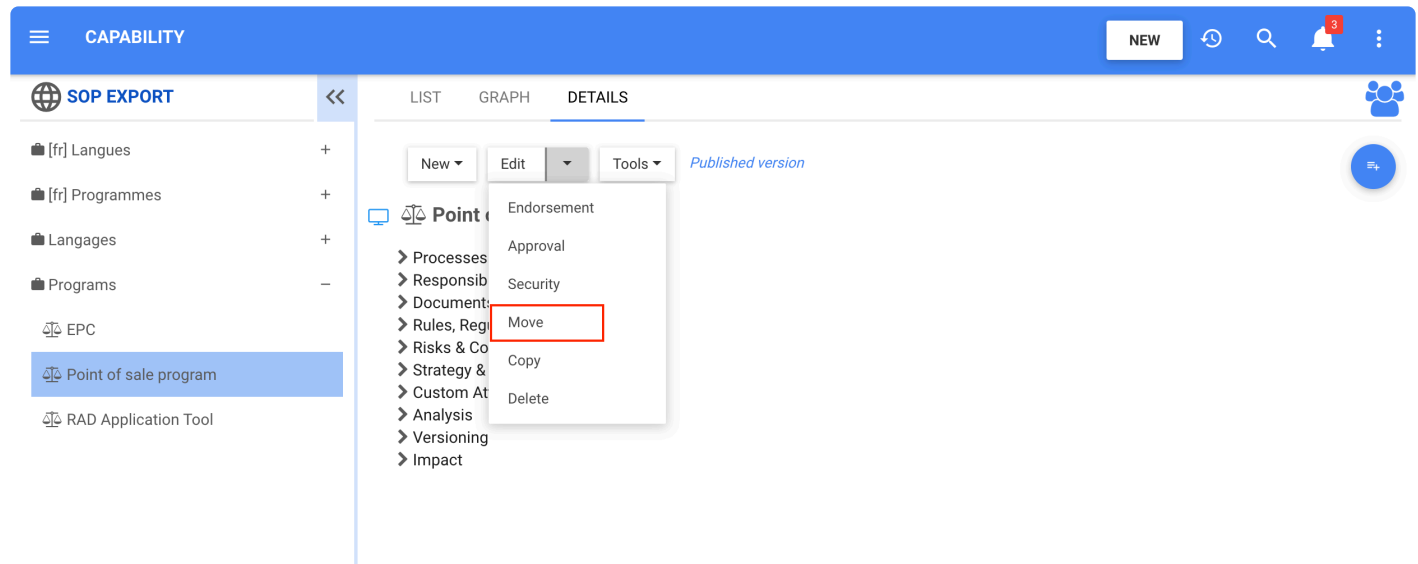
In the new EPC Capability module, users can move capabilities and sub capabilities in the tree by choosing the option move in DETAILS page. This makes easier for modelers to organize the structure of capabilities in this module.

## How it Works

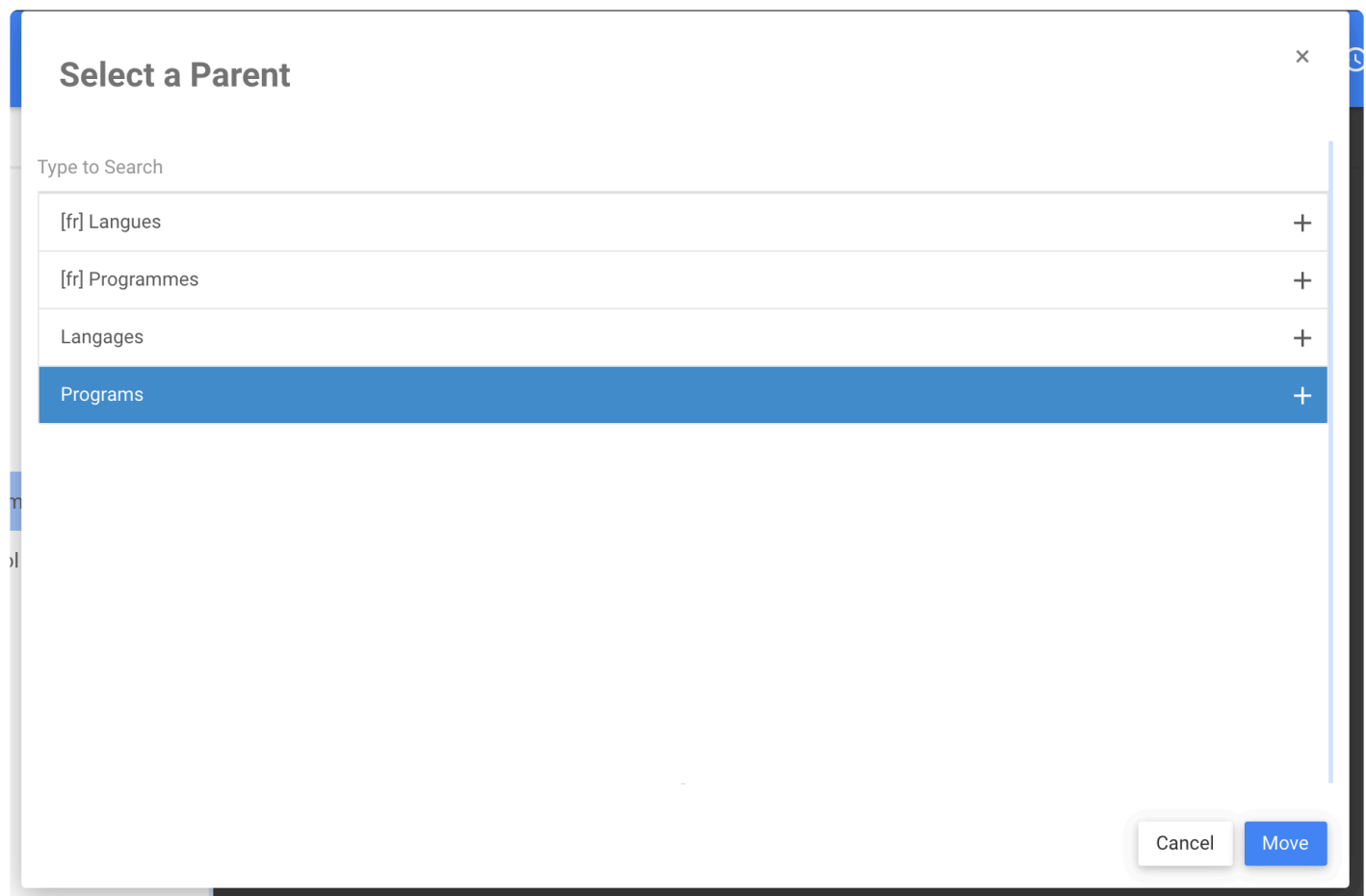
To use this feature, navigate to the Graph or Details page of the object you wish to move. Then click on the Edit dropdown and select the Move option from the dropdown menu.



Select the **Move** option from the dropdown menu.



A window opens with the tree of the module, there users can select the parent where to **move** the object.



To confirm the change, click on **Move** button.



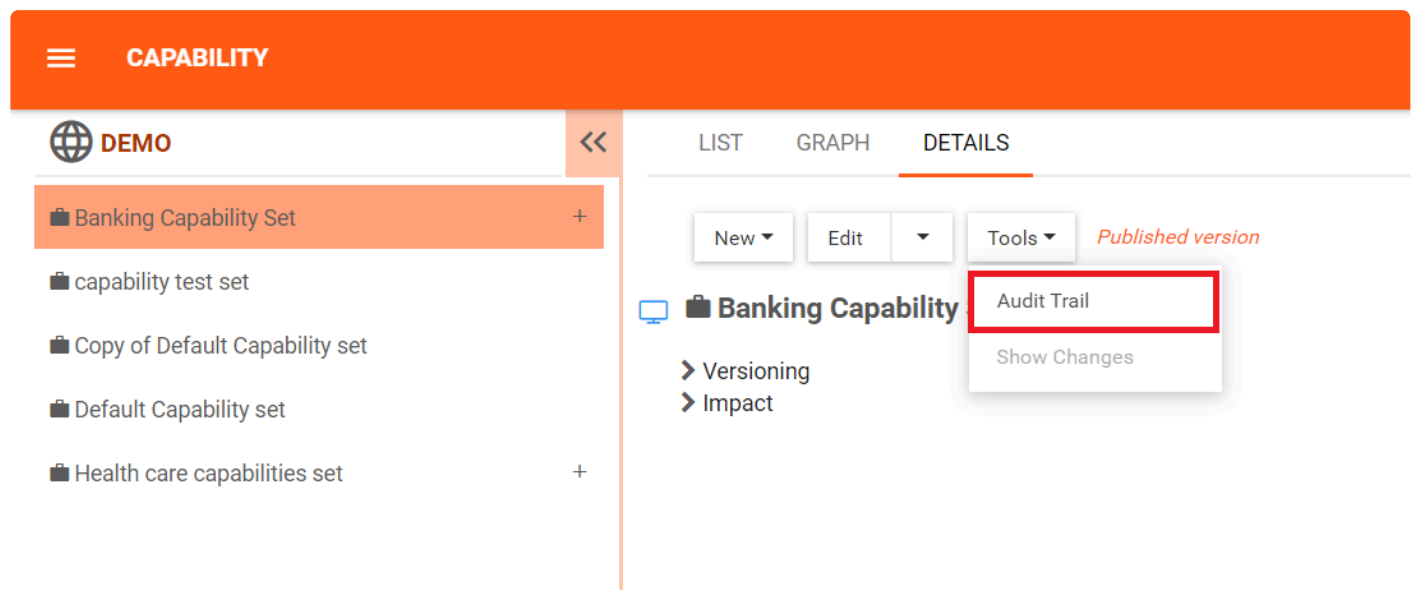
# Audit Trail – Capability

## Functionality

In the new EPC Capability module, users can see the changes made in the selected capability by clicking in the Audit Trail button. This will create an excel document that displays the changes made in the object making easier for users to track them.

## How it works

To use audit trail in capability module, users navigate to DETAILS page of an object, expand button tools and click on audit trail.



# Attribute – Capability

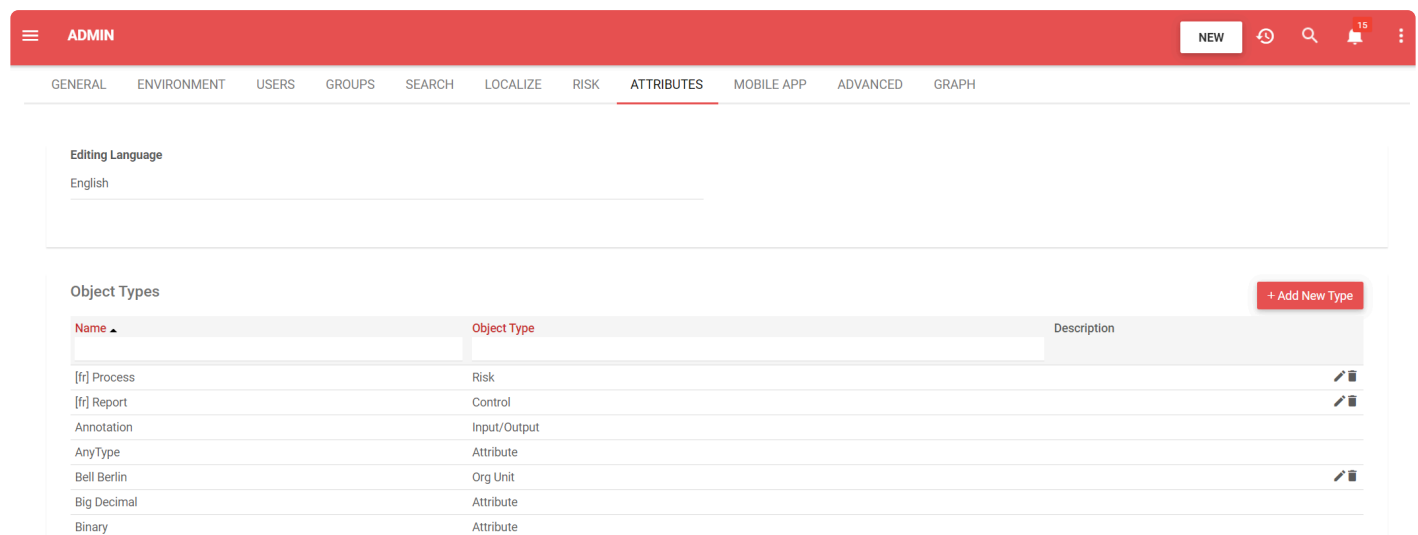
## Functionality

In the new Capability module, users can create new attributes categories, types and just attribute for its capabilities. This allows user to customize the attribute of its capabilities to adapt them to the needs of its business and provide better understanding and information about a capability.

## How it works

To use this feature, users go to the three-dots icon on the top right of the page, select System Admin, Click on tab Attributes. In that page, users can find the option to add Object types, Categories and Attributes.

To create new Object types Click on **+ Add New Type** on top right of the **Object Types** section.



Name	Object Type	Description
[fr] Process	Risk	
[fr] Report	Control	
Annotation	Input/Output	
AnyType	Attribute	
Bell Berlin	Org Unit	
Big Decimal	Attribute	
Binary	Attribute	

Then a form opens, where the user can add the Name, description and to which object it will apply.



**ADMIN**

GENERAL ENVIRONMENT USERS GROUPS SEARCH

**Editing Language**

English

**Object Types**

Name ▲

Name	Type	Risk
[fr] Process		Risk
[fr] Report		Control
Annotation		Input/Output
AnyType		Attribute
Bell Berlin		Org Unit
Big Decimal		Attribute
Binary		Attribute
Boolean		Attribute
Branch		Org Unit
Client		KPI

**Categories**

Name ▲

1oldCovid-19

747 Boeing

**Add New Object Type**

Type Name \* Type Name

Description Description

Applicable to Object(s) : CAPABILITY

- ASSET
- ATTRIBUTE
- CAPABILITY** ✓
- CONTROL
- DOCUMENT
- ENTITY
- KCI
- KPI
- KRI
- INPUT/OUTPUT
- OBJECTIVE
- ORG UNIT
- PROCESS
- RESOURCE
- RISK
- ROLE
- RULE
- SERVICE
- TERM

Cancel Add

To create new categories, scroll down to the **Categories** section and click on **+ Add New Category** on top right of that section.

**Categories**

+ Add New Category

Name ▼	Value neutral	Value destructive	Asset	Attribute	Capability	Control	Document	Entity	Flow object	KCI	KPI	KRI	Objective	Org Unit	Process	Resource	Risk	Role	Rule	Term
			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Then a form will open to add a new category.

**ADMIN**

GENERAL ENVIRONMENT USERS GROUPS SEARCH

**Editing Language**

English

**Object Types**

**Name** ▲

[fr] Process	Risk
[fr] Report	Control
Annotation	Input/Output
AnyType	Attribute
Bell Berlin	Org Unit
Big Decimal	Attribute
Binary	Attribute
Boolean	Attribute
Branch	Org Unit
Client	KPI

**Categories**

**Name** ▲

1oldCovid-19	
747 Boeing	
Ad-hoc	
Business	
Competition	
Covid-19	
Finance	
IO - Problem Notice	

**Add New Category**

Category Name \* Category Name

Description Description

Applicable to Object(s) : CAPABILITY

Sel. All Desel. all

- ASSET
- ATTRIBUTE
- CONTROL
- DOCUMENT
- ENTITY
- FLOW OBJECT
- KCI
- KPI
- KRI
- INPUT/OUTPUT
- OBJECTIVE
- ORG UNIT
- PROCESS
- RESOURCE
- RISK
- ROLE
- RULE
- SERVICE
- TERM
- CAPABILITY** ✓

Cancel Add

Finally to create an Attribute assigned to a Capability, scroll down to the **Attributes** section and click on **+ Add New Attribute**.

## Attributes

+ Add New Attribute

Name ▾	Asset	Attribute	Control	Document	Entity	Flow object	KCI	KPI	Objective	Org Unit	Process	Resource	Risk	Role	Rule	Term	Capability
01. SWOT - STRENGTH	<input type="checkbox"/>	<input checked="" 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 type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
02. SWOT - WEAKNESS	<input type="checkbox"/>	<input checked="" 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 type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
03. SWOT - OPPORTUNITY	<input 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 type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Then a form will open where users can add all the information related to this new attribute in capability.

ADMIN

Name ▾

1oldCovid-19

747 Boeing

Ad-hoc

Business

Competition

Covid-19

Finance

I0 - Problem Notice

I1 - Problem Qualified

I2 - Root cause idenfied (error known)

Attributes

Name ▾

01. SWOT - STRENGTH

02. SWOT - WEAKNESS

03. SWOT - OPPORTUNITY

04. SWOT - THREAT

Activity Documentation

Adm. ID

Aktivierungszeitpunkt

Anlagentyp

Archived

Assessment Status

Add New Attribute

Attribute Name \*

Attribute Name

Description

Description

Applicable to Object(s) :

CAPABILITY

Attribute Type

Sel. All

Desel. all

ASSET

ATTRIBUTE

CAPABILITY ✓

CONTROL

DOCUMENT

ENTITY

FLOW OBJECT

KCI

KPI

KRI

INPUT/OUTPUT

OBJECTIVE

ORG UNIT

PROCESS

RESOURCE

RISK

ROLE

RULE

SERVICE

TERM

Is Mandatory

Drop-down Values

Check the checkbox of one value

Cancel

Add

After these new categories, types and attributes have been created, users can select them in edit or add capability form on tab PROPERTIES.

# Environment & System Admin Settings – Capability

## Functionality

In the new Capability module, users lock and unlock objects, restore file objects and control user permissions in the Capabilities module.

In system Admin, modelers and system administrators can add new users or synchronize them with the active directory. Only the system administrator has access to all users and groups in the system. He or she can edit the information, the access given to users and add users to different environments and groups. The system Admin can also define which groups are Admin, Modelers, and have web app access

In the Environment Admin, the system administrator and modelers can edit the module security in an environment. In this tab, they can allow users or groups to have access or not to the capabilities module in the environment they are in. Furthermore, in Archive tab, they can restore deleted objects and in GENERAL tab, they can lock, unlock objects.

These features allow businesses to have control over the security of the module and keep the integrity of the architecture of their businesses safe.

## How it Works

### In Environment Admin

- The **General** tab allows users to view any locked capabilities under Locked Objects. It also allows users to unlock any capabilities from the table.

The screenshot shows the 'ENVIRONMENT ADMIN' interface. The top navigation bar is red with a hamburger menu, 'ENVIRONMENT ADMIN', a 'NEW' button, and icons for refresh, search, notifications (15), and a settings menu. Below this is a secondary navigation bar with tabs: GENERAL (highlighted with a red box), SEARCH, LANGUAGE, ARCHIVE, MODULE SECURITY, TABS, and GOOGLE ANALYTICS. The main content area is titled 'Locked Objects' and includes a warning note: 'Note that unlocking any object will delete any current editions being made to the object'. In the top right of the content area are 'Unlock' and 'Refresh' buttons. Below the note is a table with the following columns: Name, Type, Parent, Editor (username), and Edited Since.

Name	Type	Parent	Editor (username)	Edited Since
------	------	--------	-------------------	--------------

- The **Archive Tab** includes the deleted capabilities or capability sets. Capability objects can be

restored one at a time. If the parent and the child objects were deleted together, the parent and all child objects will be restored. If the user wishes to restore an object whose parent status is “deleted” or “locked”, click the Restore button.

ENVIRONMENT ADMIN

NEW

🔍 15

GENERALSEARCHLANGUAGEARCHIVEMODULE SECURITYTABSGOOGLE ANALYTICS

### Restore

Click a row to select a deleted object and either click Restore or Restore to a New Parent.

- One deleted object can be restored at a time.
- If the process is a parent of objects that were deleted together, the parent process and all sub objects will be restored.
- If you wish to restore an object whose parent status is "deleted" or "locked", please click the Restore to a New Parent button.
- Report type documents cannot be restored.

### Archives

RefreshRestore to New ParentRestore

Name	Type	Parent	Parent Status	Created ...	Created By	Deleted On	Deleted By
Imported Data Diction...	Master Data Set	Formation	Exists	30-May-2021	Jodie1 Holway1 (jholway1)	30-Jun-2021	Jodie1 Holway1 (jholway1)
Invoice Data	Entity	Import Folder	Deleted	30-May-2021	Jodie1 Holway1 (jholway1)	30-Jun-2021	Jodie1 Holway1 (jholway1)
Product code	Attribute	Import Folder	Deleted	30-May-2021	Jodie1 Holway1 (jholway1)	30-Jun-2021	Jodie1 Holway1 (jholway1)

- The **Module Security** Tab allows the admin to give or remove rights to view the capability module by checking it on of off. The module security tab will allow a user or a user that is part of a group to be included in the capability module.

ENVIRONMENT ADMIN

NEW

🔍 15

GENERALSEARCHLANGUAGEARCHIVEMODULE SECURITYTABSGOOGLE ANALYTICS

### Edit Security of Modules

Some users and groups do not appear in the list by default if they are not given explicit permissions to the environment. To add a user or group to the list, type the user's username, first or last name, or the group's name, and click the result to search it. By default, the user or group will be granted permission to all modules.

Search User or GroupNOTHING SELECTEDType to Find a User or Group

Name	Type	ALL	Apps To Do	Capability	Glossary	Governance	Master Data	Rule	Control	Risk	Organization	Performance	Documents	Process	All (Default)
User 1	User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
User 2	User	<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"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

In System Admin:

System Administrators go to Users and Groups tabs, there, they can give them read, write and delete permission to allow to view and edit content in capability module

ADMIN







NEW

15

GENERALENVIRONMENTUSERSGROUPSSEARCHLOCALIZERISKATTRIBUTESMOBILE APPADVANCEDGRAPH

List of Groups

+ Add New Group

Name	Admin	Modeler Access	WebApp Access	
Administrators	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
Authenticated Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
denygroup	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 

- View the module requires read permission
- View and Editing require read/write permission
- Deleting, View and editing requires write delete, write, read permission


×

## Edit Environments of: Administrators

To add an environment to the group, type the desired environment name below and click on the desired environment name within the drop down.

Select an Environment 

d

Environment	Environment Admin	Full Control Allow	Write Delete Allow	Write Allow	Read Allow	Show Latest Allow	Full Control Deny	Write Delete Deny	Write Deny	Read Deny	Show Latest Deny	
Web Admin Environment	<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 type="checkbox"/>	<input type="checkbox"/>	

«

<

1

>

»

Show: 10 - 25 - 50

Close



# Search – Capability

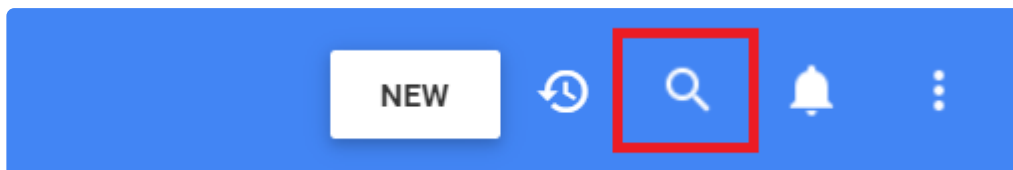
## Functionality

In the new Capability modules, users can search capabilities by name and description to quickly navigate to the desired item. This makes easier for users to find information within then capability module.

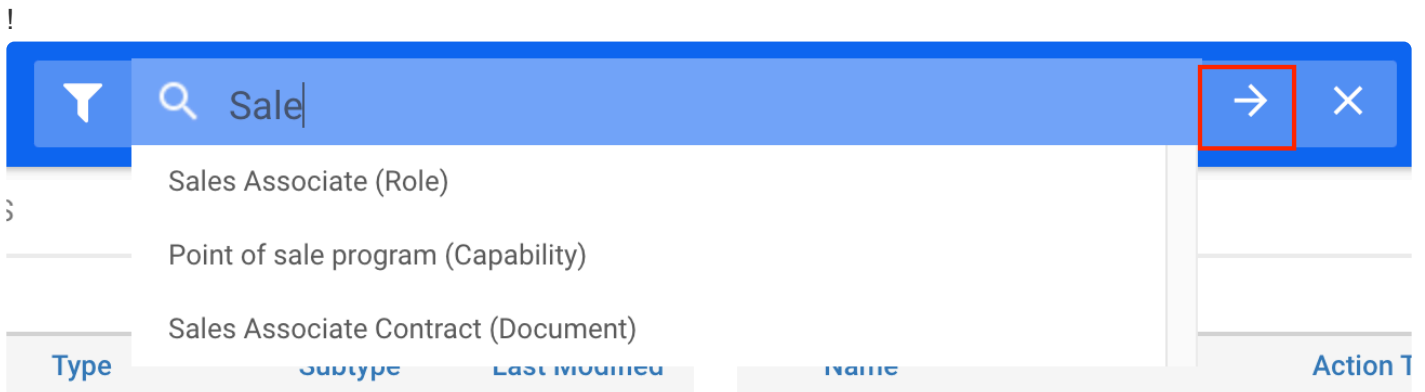
## How it Works

Searching for a Capability with the search bar allows the user to quickly navigate to the desired Capability. User are able to search by name & description.





To use this feature, Users click on the search button at the top right of your screen.






Type the name or description of the desired capability then click enter on the search button.



EPC will find the best matching results.

  Sale  

3 results

-  **Sales Associate** (Role) In Progress
-  **Point of sale program** (Capability) Published
-  **Sales Associate Contract** (Document) In Progress

No more results to show

Also, users have the option to click on quick graph icon to be redirected to the graph page.

3 results

 **Sales Associate** (Role) In Progress

 **Point of sale program** (Capability) Published

 **Sales Associate Contract** (Document) In Progress

No more results to show

or be redirected to the Details page of the Capability when clicking on the name.

3 results

 **Sales Associate** (Role) In Progress

 **Point of sale program** (Capability) Published

 **Sales Associate Contract** (Document) In Progress

No more results to show

# **Import/Export – Capability**

---

## **Functionality**

In the new Capability module, Import and Export is supported, users can import and export information if needed.

# New Approval and Endorsement Cycle Features

---

## Functionality

To streamline the Approval or Endorsement cycle processes, multiple new features have been added to share change review feedback, collaboration and increase audit compliance

facilitate the Approval or Endorsement cycle process in EPC 13.0, users have new features to share more information and make the approval process even faster and easier than before.

Users will now have the following improvements:

- Capability to attach documents to pending approvals or endorsements. This allows the users to highlight specific detailed change requests and add comments during review cycles
- Download the approved version of ANY OBJECT in a pdf format including injected e-signatures and timestamps from all approvers.
- Ability to request an e-signature and MFA in all modules; adding greater security and audit compliance

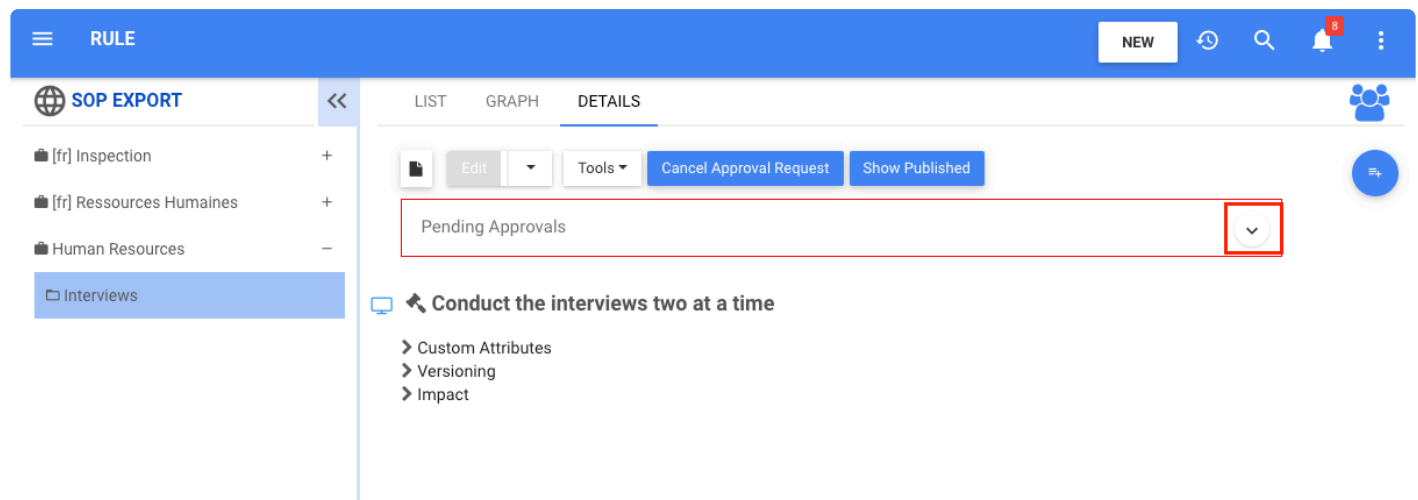
# Approval Cycle – Approval Document Generated with eSignature Request

## Functionality

Now in EPC, when documents are sent for approval with an electronic signature, users can view the approval document by expanding the pending approval message in all modules. The format of the approval document is as follows: the cover page, signature are added to the second page and the object information follows. Only in the Document object, after the object information, users can see the original document being approved. This allows users to keep track of the object information being approved and to know by whom it was approved.

## How it works

To use this feature, users send object for approval with e -signature.



Once the approval has been sent. The approval document is generated, this can take sometime, users should keep working and then refresh the page to see the two documents.

Note: The button Approve is disabled until the approval document is generated.

## Pending Approvals



"2" needs your review and approval.

Comment from : Di Nu (Di)

No comment for this version

Your comment:

[Approve](#)[Reject](#)[Show Changes](#)[Add Attachment](#)[Delegate](#)

You last APPROVED 2 on 26-Jul-2021, 3:27:37 pm. Modifications were made to this object since your last review

[Show Changes Since My Last Review](#)

Editable document for tracked feedback

2.docx



Waiting for Approval

**Marie Brulotte (marie.brulotte)**

a few seconds ago

Users have two documents, one editable word doc to track the feedback and one digitally signed PDF doc. To see them, expand the message “Pending approval” by clicking on the downward arrow. The pdf approval document has a cover, the second page is where the signature are added once the object is approved and following is the information of the object. For Document object, the approval PDF document also includes the original document sent for approval.

Note: if the pdf document is not being shown, please refresh the page again.

### Pending Approvals

"Conduct the interviews two at a time" needs your review and approval.

Comment from : Marie Brulotte (marie.brulotte)

No comment for this version

Your comment:

Approve

Reject




Show Changes

Add Attachment




Delegate



#### Approval Cycle

Editable document for tracked feedback

 Conduct the interviews two at a time.docx  

Digitally Signed PDF Document

 Conduct the interviews two at a time.docx.pdf  



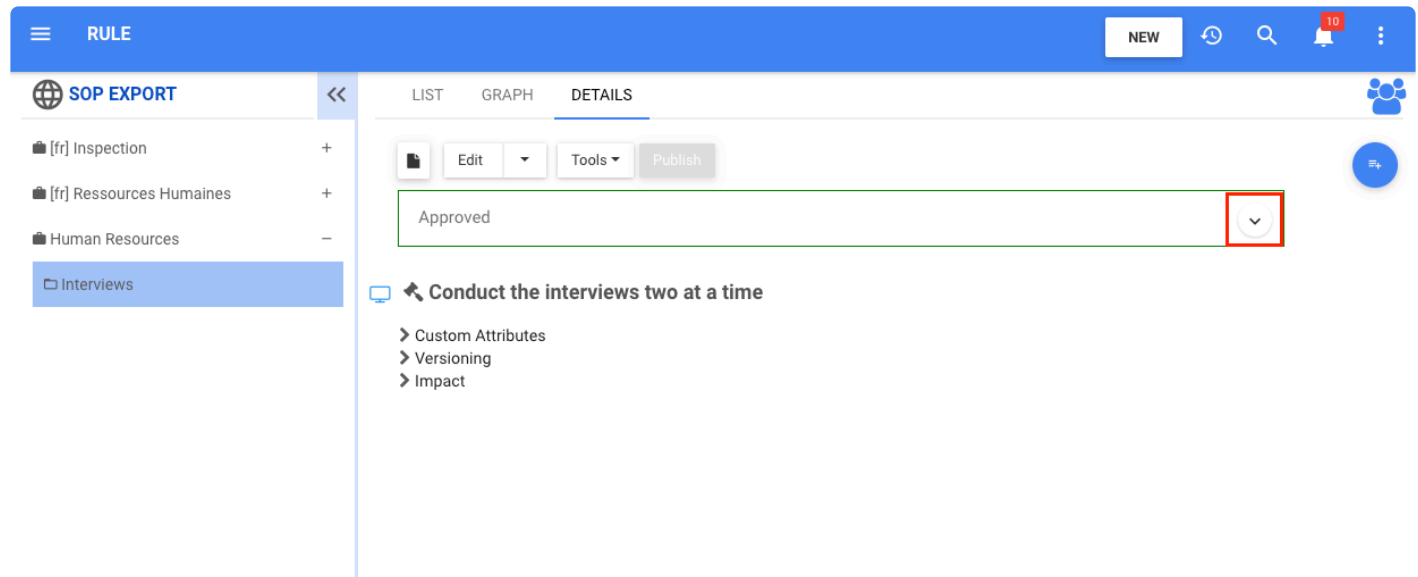
Waiting for Approval

**Marie Brulotte (marie.brulotte)**

3 minutes ago

Once the object has been approved, the Approval pending turns into Approved and it is highlighted in green.



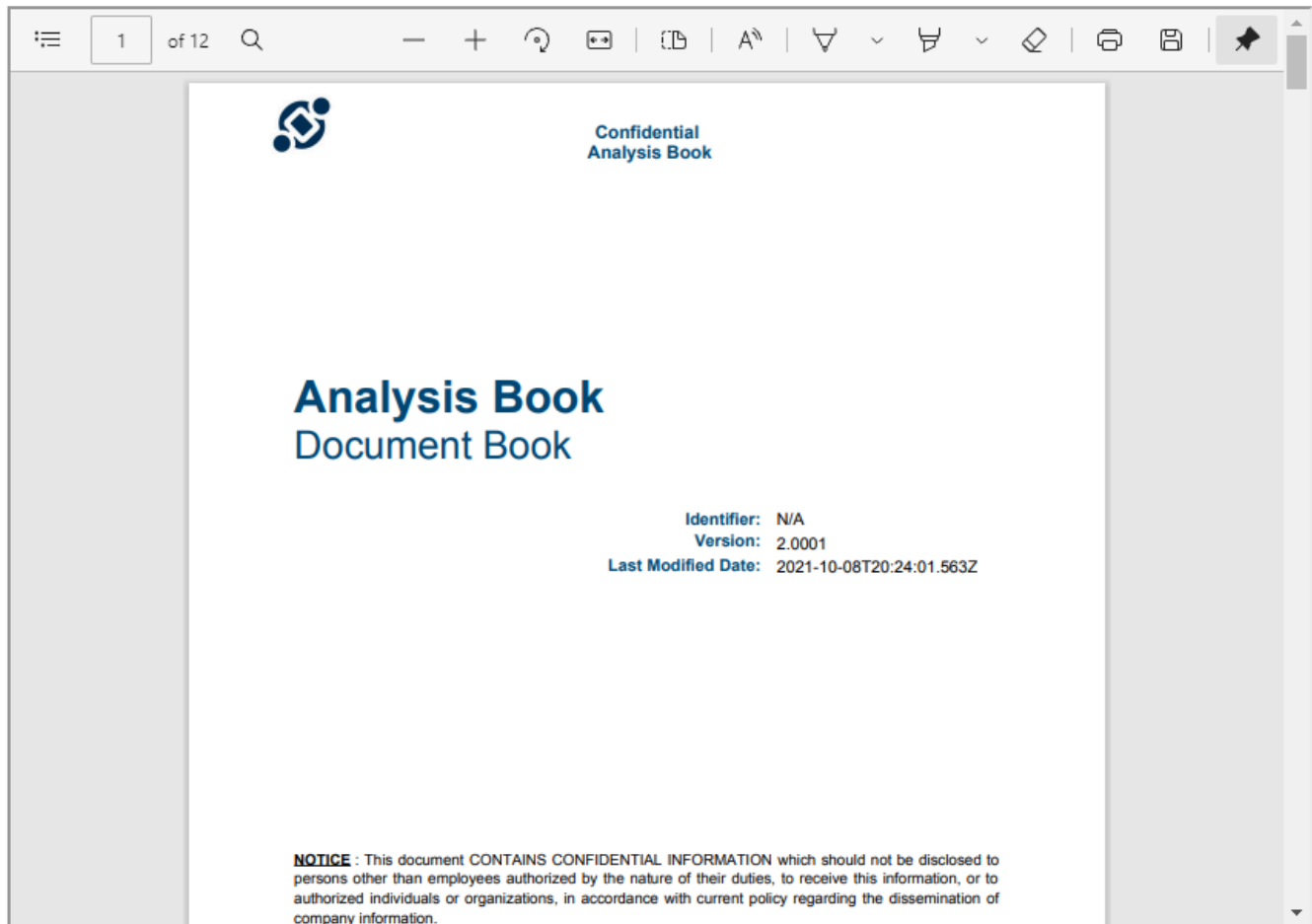


Then the users can preview or download the approval document of the approved object. The approval document is generated by the system.

This document includes the cover

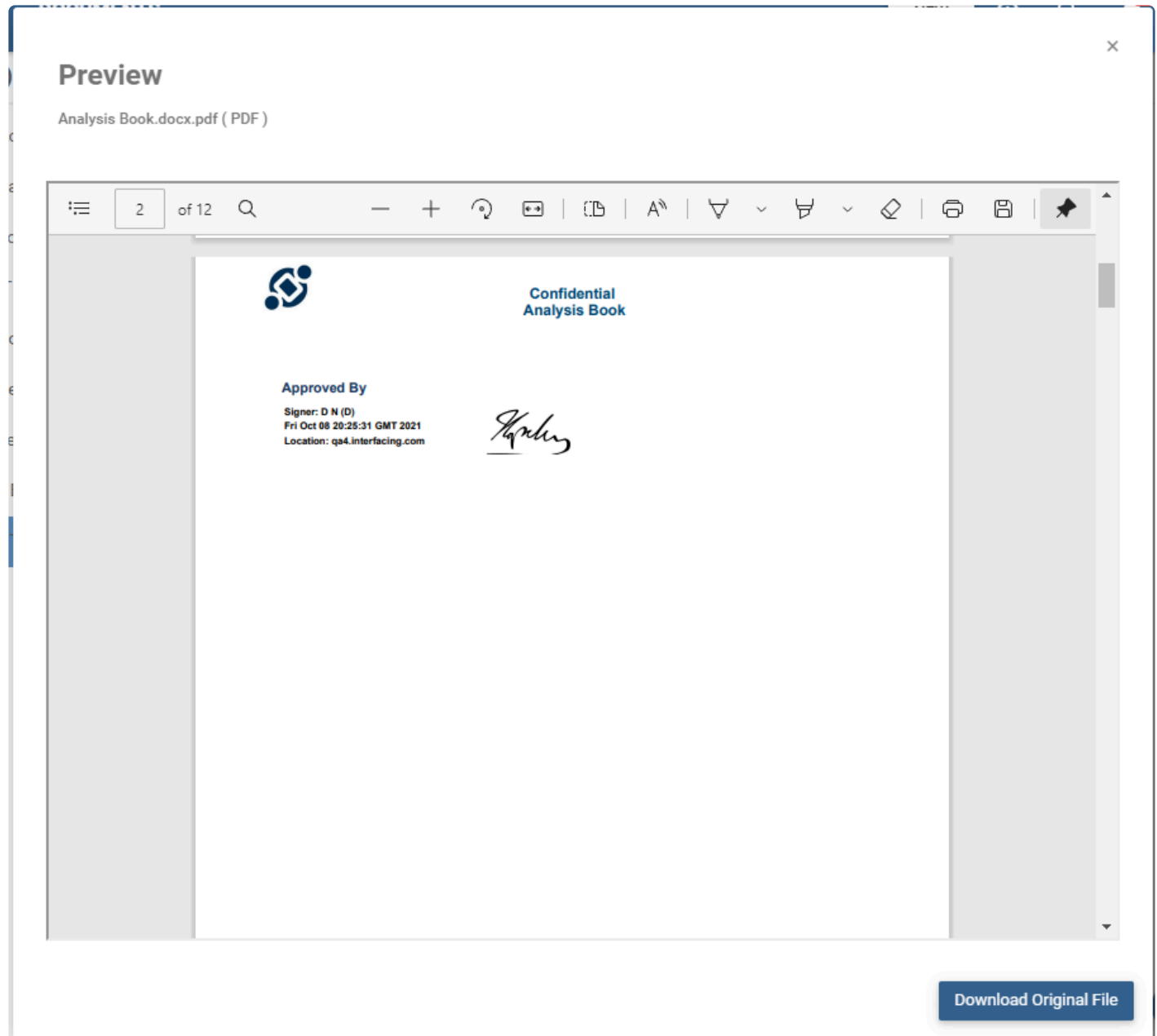
## Preview

Analysis Book.docx.pdf ( PDF )



[Download Original File](#)


In the second page the signature of the approver(s)



following users will find the information of the object starting with the table of content

## Analysis Book.docx.pdf ( PDF )

3 of 12



**Confidential  
Analysis Book**

### Table of Contents



1.0 Document History.....	4
1.1 List of Documents.....	4
2.0 Document Definition.....	5
2.1 Document Description.....	5
2.2 Associated Documents.....	5
2.3 Associated Data Attributes.....	5
















[Download Original File](#)




## Preview

Analysis Book.docx.pdf ( PDF )

 4 of 12 



**Confidential  
Analysis Book**

### 1.0 Document History

Summary of modifications:

Version	Date	Modified by	Comments
1.0000	2021-02-23T02:58:03.123Z	Lianne Hurtubise	N/A
2.0000	2021-04-12T01:38:58.977Z	Scott Armstrong	Updated Templates

Document Owners / Accountable (rAci)

Responsibility	Name
Owner Role (A)	None Defined
Owner Org Unit (A)	None Defined

Document Level RACI Matrix (Roles and Org Units) :

[Download Original File](#)

# Document Module – Add Personalized Module Approval template

---

## Functionality

Now in EPC, users can personalize its approval document cover for each module.

## Customization

Each approval template is unique per module, when a user uploads a new approval template, the previous template is replaced by the new one.

## How it works

To use this feature, users have to create a new document. Once users have the New document form open, they can select type as template. Then select the module to which the template corresponds and mark the checkbox of Approval Template.

Upload the template for the respective modules Performance, Organization, Risk, Control, Rule, Master Data, Capability, Documents. This template will be used to create the approval document with e signature in the respective module.

Editing Language

ENGLISH



## GENERAL

## PROPERTIES

Add &amp; Close

## What is this Document?

Name \*

What is the name?

Parent \*

Select a Parent

Unique Identifier

What is the unique identifier?

### Description

[illegible]

Type

URL

File Link

Document

Wiki

Generated

plate

## Template

Applicable to

Process ☐Risk ☐Rule ☐Control ☐Document ☐

Master Data ☐

Organization ☐

Performance ☐

Approval Template ☐

Choose or drag file(s) here



# Approval Cycle – eSignature now in all Modules

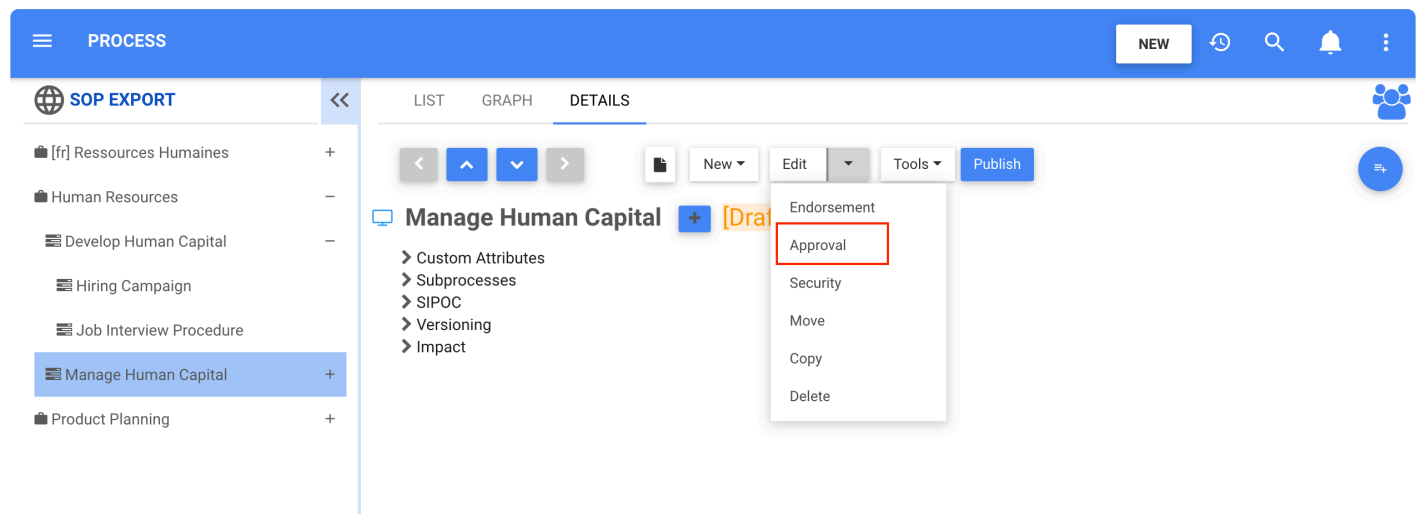
## Functionality

In EPC, users can now add security to their approval cycle by requesting an electronic signature. Users can request the electronic signature when assigning an object to an approval, this feature has been added in all modules.

Users can find it e signature option in Process, Documents, performance, control, Rule, Master Data, Capability, Glossary, Organization and Risk.

## How it works

To use this feature, users navigate to the **Details** page of the object, there click on the dropdown menu of the **Edit** button and select **Approval**



The Assign Object approval cycle window open, there select **Signature Required** and approvers, then click on Save button.



×

## Assign Object Approval Cycles

Signature Required

✓

Select Approval Cycle Type

SERIAL

▼

Select Approvers

FILTER TYPE ▼

Ari

Suggested Approvers

+

≡ 1

Arif Khan

Resource

×

☐

Apply changes to all children

Cancel


Save

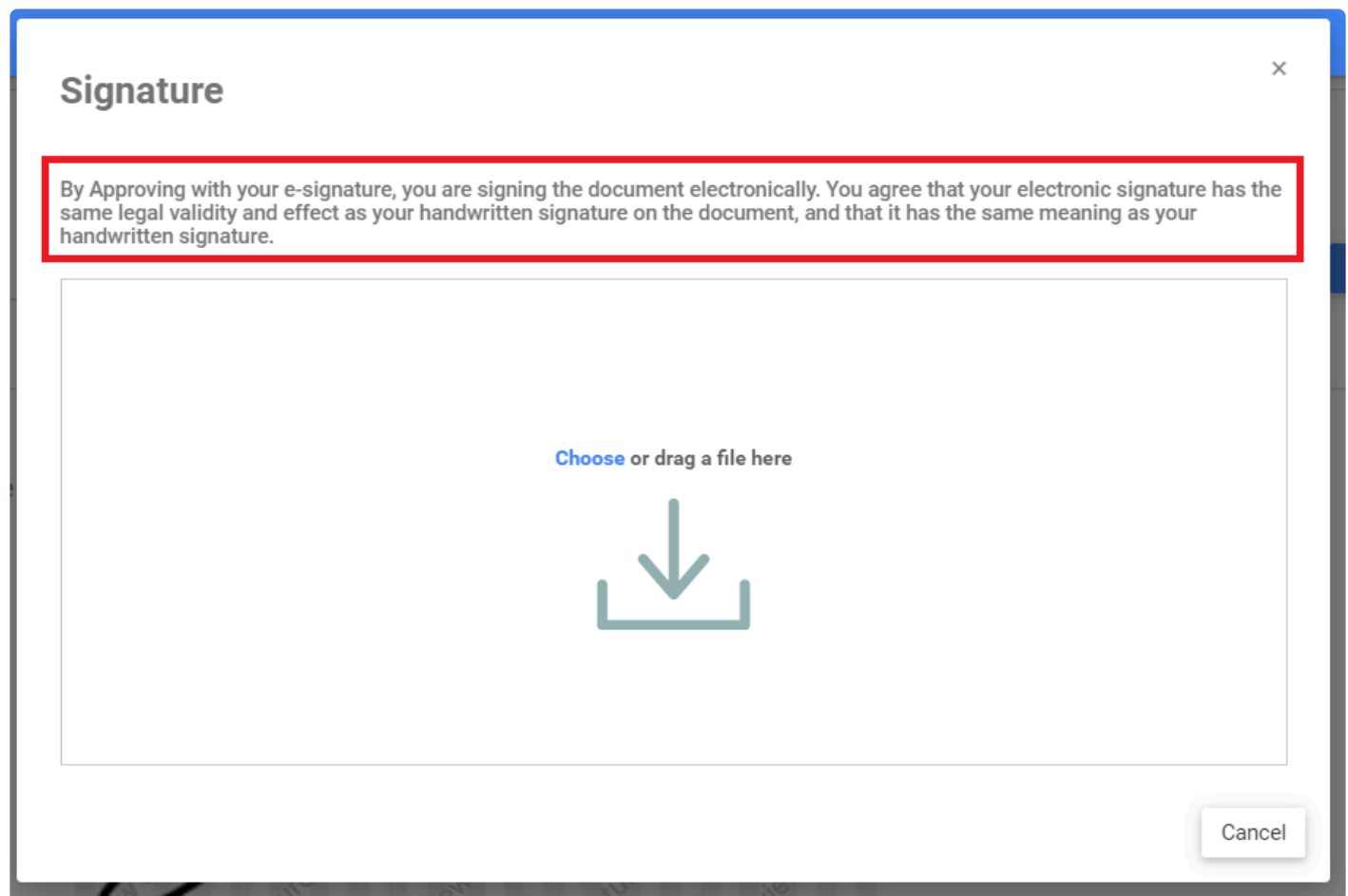
# Approval Cycle – Notification e-signature legal validity

## Functionality

Now in EPC, when users create their signature or approve an object with e-signature, they can see a message reminding them the legal validity of the e-signature. Helping user to keep in mind the importance of their e-signature.

## How it works

Users see the message when adding their e-signature in My profile, by clicking on **Add/Edit Signature**  button. There, a window appears with the message



Also, when users are approving an object with e-signature required for the approval, user will see a similar message.

## Approval Authentication



Please provide your login credentials before continuing with this operation.



di



.....

**NO  
SIGNATURE  
AVAILABLE**

By Approving with your e-signature, you are signing the document electronically. You agree that your electronic signature has the same legal validity and effect as your handwritten signature on the document, and that it has the same meaning as your handwritten signature.

[Modify Signature](#)

Close

Approve

# Approval Cycle – Add Attachment in Pending Approval

---

## Functionality

Now in EPC, users can attach documents to pending approval to share information with the sender. Allowing the endorser to add more information for their issuers if necessary, aiding communication for these users.

## How it works

To use this feature, users go to their pending Approval and Click on the Add Attachment button

### Pending Approvals

"Develop and Manage Human Capital" needs your review and approval.

Comment from : Marie Brulotte (marie.brulotte)  
No comment for this version

Your comment:

Approve

Reject

Show Changes

Add Attachment




Delegate

You last APPROVED Develop and Manage Human Capital on 12-Jul-2021, 10:25:45 am. Modifications were made to this object since your last review




Show Changes Since My Last Review


#### Approval Cycle


Editable document for tracked feedback

 Develop and Manage Human Capital.docx  

Digitally Signed PDF Document

 Develop and Manage Human Capital.docx.pdf  





Waiting for Approval **Marie Brulotte (marie.brulotte)**  
7 minutes ago

A window will open to allow user to select the file. Once the file have been uploaded, then file will appear at the bottom of the pending approval.

### Pending Approvals

"Develop and Manage Human Capital" needs your review and approval.  
Comment from : Marie Brulotte (marie.brulotte)  
No comment for this version  
Attachment:

Your comment:

Approve

Reject

Show Changes

Replace Attachment

Delegate

You last APPROVED Develop and Manage Human Capital on 12-Jul-2021, 10:25:45 am. Modifications were made to this object since your last review

Show Changes Since My Last Review

#### Approval Cycle

Editable document for tracked feedback  
Develop and Manage Human Capital.docx

Digitally Signed PDF Document  
Develop and Manage Human Capital.docx.pdf

Waiting for Approval

Marie Brulotte (marie.brulotte)

7 minutes ago

✕

epcprocessformation.001.png

The Add Attachment button will now be replaced by the [Replace Attachment](#) button. By clicking on it, the user will be able to remove the current attached file and replace it with another one.

To delete the attachment and not replace it with another one, click on the X button next to the file name

To download the attached file, click on the download button next to the file name

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To preview the attached file, click on the preview button next to the file name



# Endorsement Cycle – Add Attachment in Endorsement

## Functionality

Now in EPC, users can attach documents to pending endorsements to share information with the sender. Allowing the endorser to add more information for their issuers if necessary, aiding communication for these users.

## How it works?

To use this feature, users go to their pending endorsements and Click on the Add Attachment button




The screenshot displays the 'Pending Endorsement' interface. At the top, it says 'Pending Endorsement' with a close button. Below this, the text reads: '"RAD Application Tool" needs your review', 'Comment from : Marie Brulotte (marie.brulotte)', and 'No comment for this version'. An attachment is listed as 'epcprocessformation.001.png' with download and view icons. A text area for 'Your comment:' is provided. Below the text area are five buttons: 'Endorsed' (green), 'Not Endorsed' (red), 'Show Changes' (blue), 'Add Attachment' (blue, highlighted with a red box), and 'Delegate' (blue). Underneath these buttons is the 'Endorsement Cycle' section, which includes a 'Stop' button, a warning icon, a user profile icon for 'Marie Brulotte (marie.brulotte)', and the status 'Waiting for Endorsement' with a timestamp 'a few seconds ago'.

A window will open to allow user to select the file. Once the file have been uploaded, then file will appear at the bottom of the pending endorsement



### Pending Endorsement

"RAD Application Tool" needs your review  
Comment from : Marie Brulotte (marie.brulotte)  
No comment for this version

Attachment:  epcprocessformation.001.png  

Your comment:

Endorsed

Not Endorsed


Show Changes


Replace Attachment





Delegate


### Endorsement Cycle

Stop



 Waiting for Endorsement **Marie Brulotte (marie.brulotte)**  
a few seconds ago

  Capture d'écran, le 2021-07-22 à 10.00.54.png  

The Add Attachment button will now be replaced by the  button. By clicking on it, the user will be able to remove the current attached file and replace it with another one.

To delete the attachment and not replace it with another one, click on the X button next to the file name



To download the attached file, click on the download button next to the file name



To preview the attached file, click on the preview button next to the file name



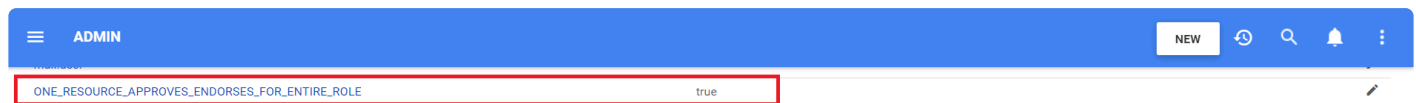
# Single Resource of a Role can Endorse or Approve

## Functionality

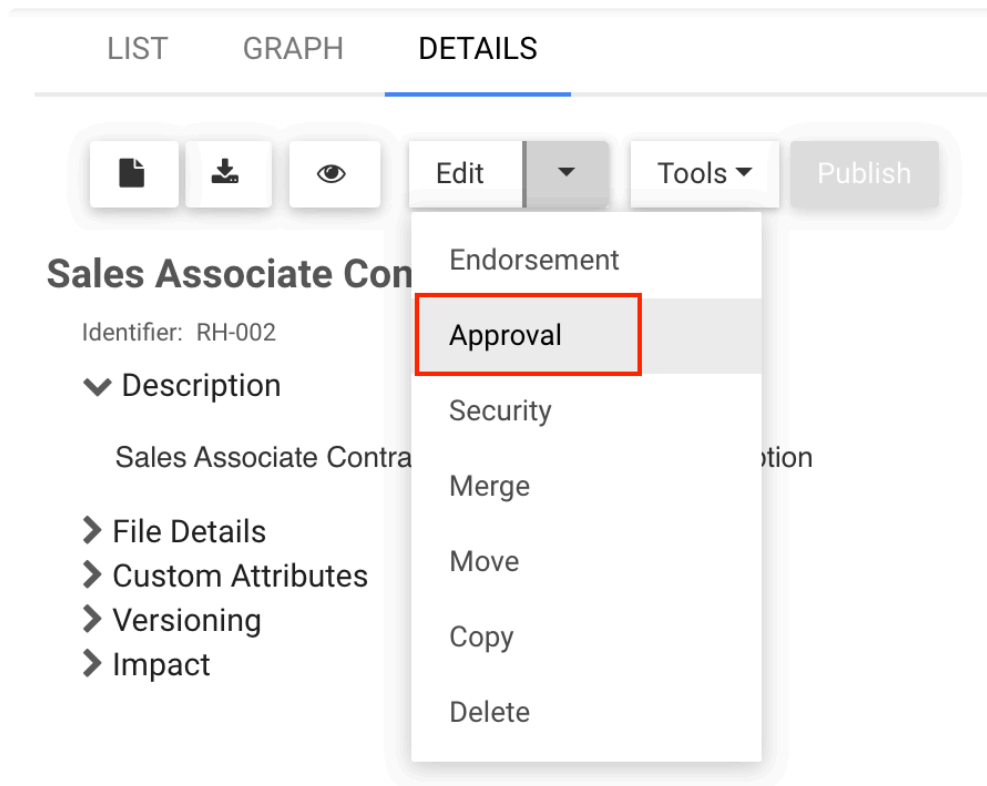
In order to provide more flexibility with approval and endorsement cycles, EPC now features a new setting to choose whether all persons assigned to a role are required to approve/endorse or only one of them is enough

## How it Works?

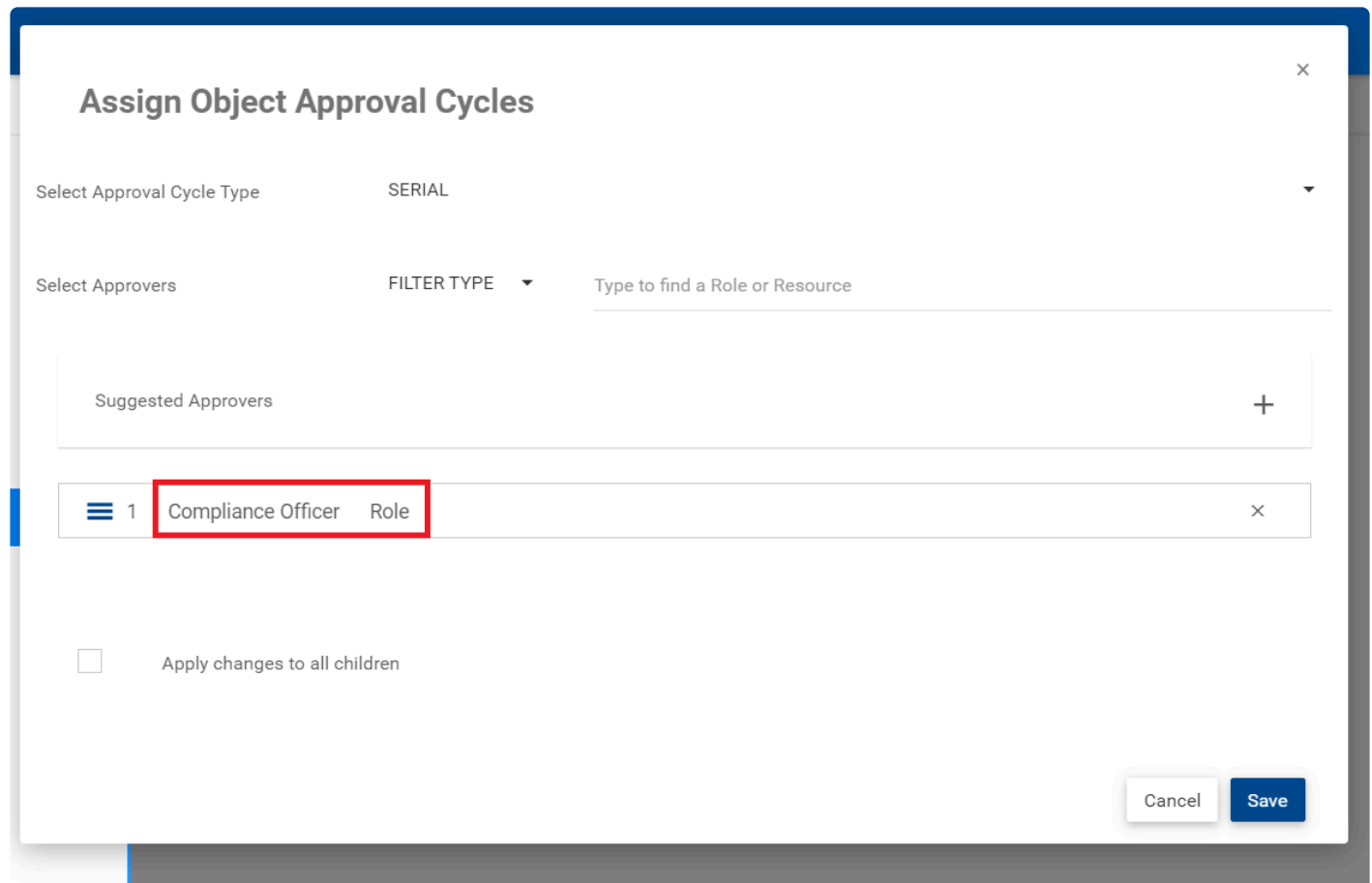
To use this feature, Admin Administrators can click on the dots icon on the top right part of the page, select system Admin, click on Advance. Then look for the ONE RESOURCE APPROVES ENDORSES FOR ENTIRE ROLE, click on the edit button and change to true.



Once the feature has been activated, users can send the object for approval



When the Cycle type selected is SERIAL and a Role is selected to approve, then the first resource of that role receives the approval request. Once that resource approves, the rest of the resources are automatically not needed for approval.



The image shows a dialog box titled "Assign Object Approval Cycles" with a close button (X) in the top right corner. The dialog contains the following elements:

- Select Approval Cycle Type:** A dropdown menu currently showing "SERIAL".
- Select Approvers:** A section with a "FILTER TYPE" dropdown and a text input field labeled "Type to find a Role or Resource".
- Suggested Approvers:** A box with a plus sign (+) for adding suggestions.
- Selected Approver:** A list item showing "1 Compliance Officer Role" with a minus sign (-) on the left and a close button (X) on the right. The text "Compliance Officer Role" is highlighted with a red rectangular box.
- Checkbox:** An unchecked checkbox labeled "Apply changes to all children".
- Buttons:** "Cancel" and "Save" buttons at the bottom right.

Users will see that the first resource has status waiting for approval and pending for the next resources in the role.

### Pending Approvals

"test 3" needs your review and approval.

Comment from : User3 (User 3)  
No comment for this version

Your comment:

Approve

Reject

Show Changes

Delegate

Editable document for tracked feedback  
N/A

Waiting for Approval

User1 (User 1)

a few seconds ago

Pending

User2 (User 2)

Once the object has been approved by the first resource, then this resource has the status Approved by the name of the user. The next resources have a admiration icon and the note approval step skipped to show that they didn't need to approve.

LIST

GRAPH

DETAILS

Edit

Tools

Publish

### Approved

Editable document for tracked feedback  
N/A

Approved by:

User1 (User 1)

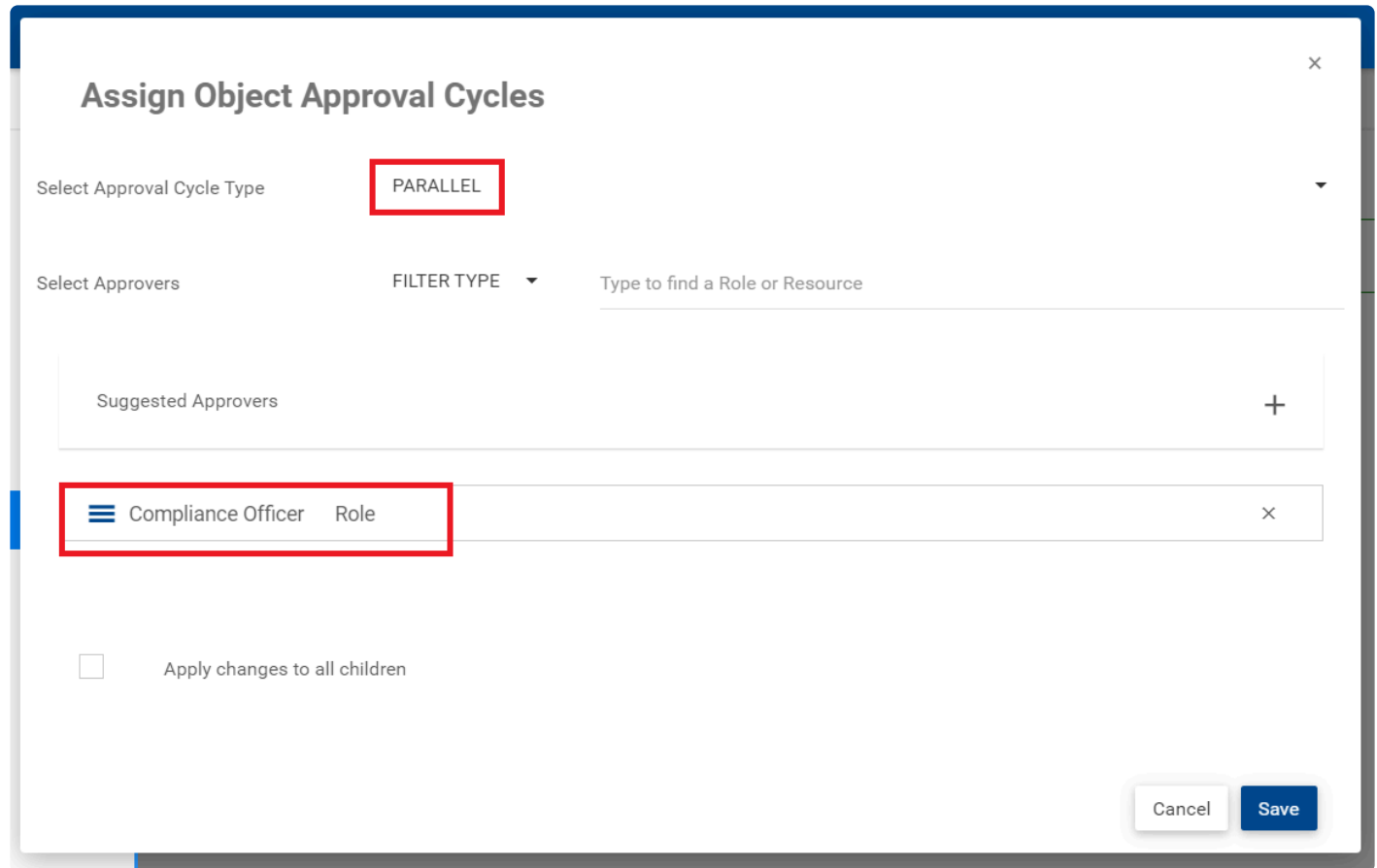
a few seconds ago

User2 (User 2)

approval step skipped

If the Cycle type is PARALLEL, then all the resources receive the approval request at the same time. Only

one resource in the roles is needed to approve the object.



The image shows a dialog box titled "Assign Object Approval Cycles" with a close button (X) in the top right corner. The dialog contains the following elements:

- Select Approval Cycle Type:** A dropdown menu with "PARALLEL" selected and highlighted by a red box.
- Select Approvers:** A section with a "FILTER TYPE" dropdown and a search input field labeled "Type to find a Role or Resource".
- Suggested Approvers:** A list box with a "+" button on the right.
- Selected Approver:** A list item "Compliance Officer" with a "Role" label and a close button (X) on the right. This entire item is highlighted by a red box.
- Apply changes to all children:** A checkbox that is currently unchecked.
- Buttons:** "Cancel" and "Save" buttons at the bottom right.

As the picture below shows, the two resources in the role have the Waiting for Approval status. Any of these resources can approve the object.

## Pending Approvals



"test 1" needs your review and approval.

Comment from : User 3 (User 3)

No comment for this version

Your comment:

[Approve](#)[Reject](#)[Show Changes](#)[Delegate](#)

Editable document for tracked feedback

N/A



Waiting for Approval

User1 (User 1)

a few seconds ago



Waiting for Approval

User2 (User 2)

a few seconds ago

# My Dashboard – Search Widget

## Functionality

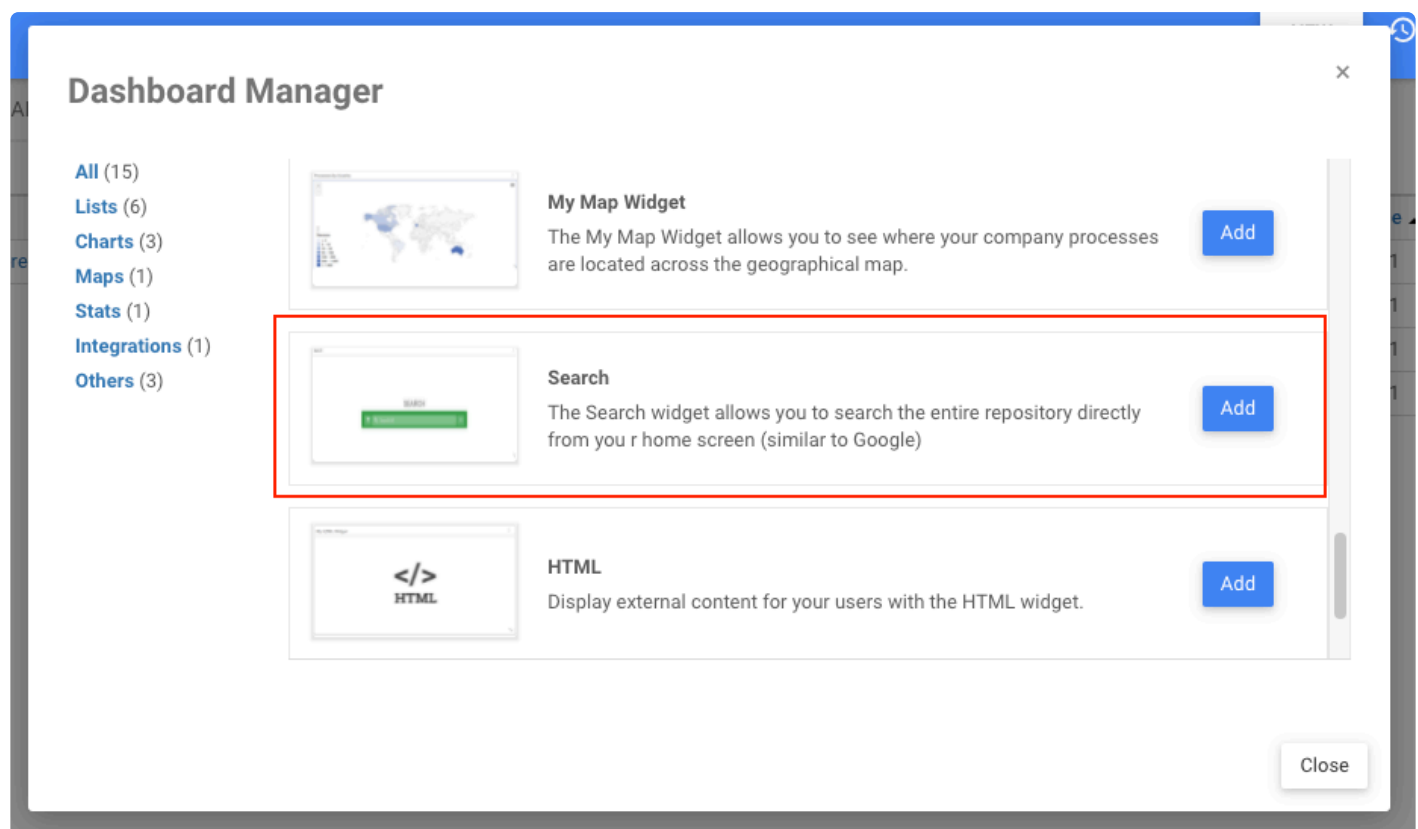
Users can now add a “Search” widget to their dashboard. The search widget is great for end-user employees because its very similar to “Google”, providing simplicity for end users to locate what they need with zero training.

The Process Name column was added to the My Flow Objects widget to reduce confusion of end users not knowing solely based on the task name which process that task relates to.

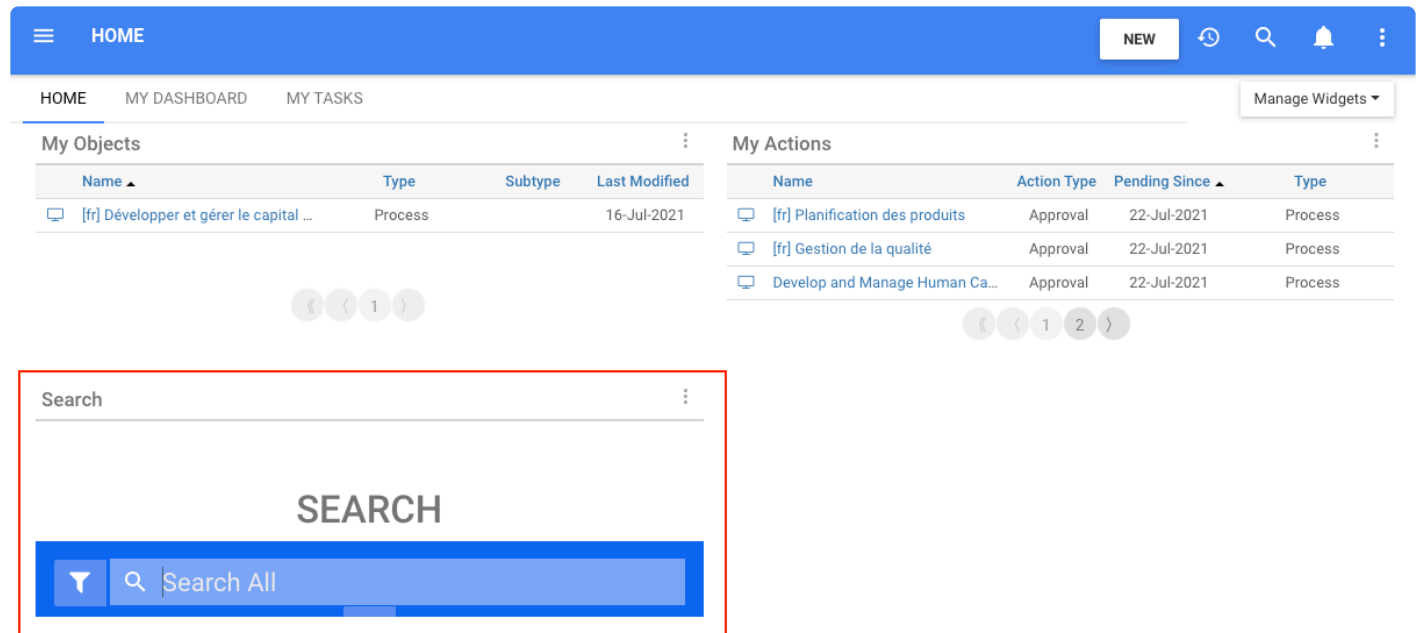
## How it works

To use this feature, users can add the search from Home in manage, in Dashboard Manager”

Click **Add** on the Search Widget



The Search Widget will automatically be added to the dashboard.



The screenshot shows the EPC dashboard with a blue header bar containing 'HOME', 'NEW', and navigation icons. Below the header, there are tabs for 'HOME', 'MY DASHBOARD', and 'MY TASKS'. The 'MY DASHBOARD' tab is active, displaying two tables: 'My Objects' and 'My Actions'.

**My Objects Table:**

Name	Type	Subtype	Last Modified
[fr] Développer et gérer le capital ...	Process		16-Jul-2021

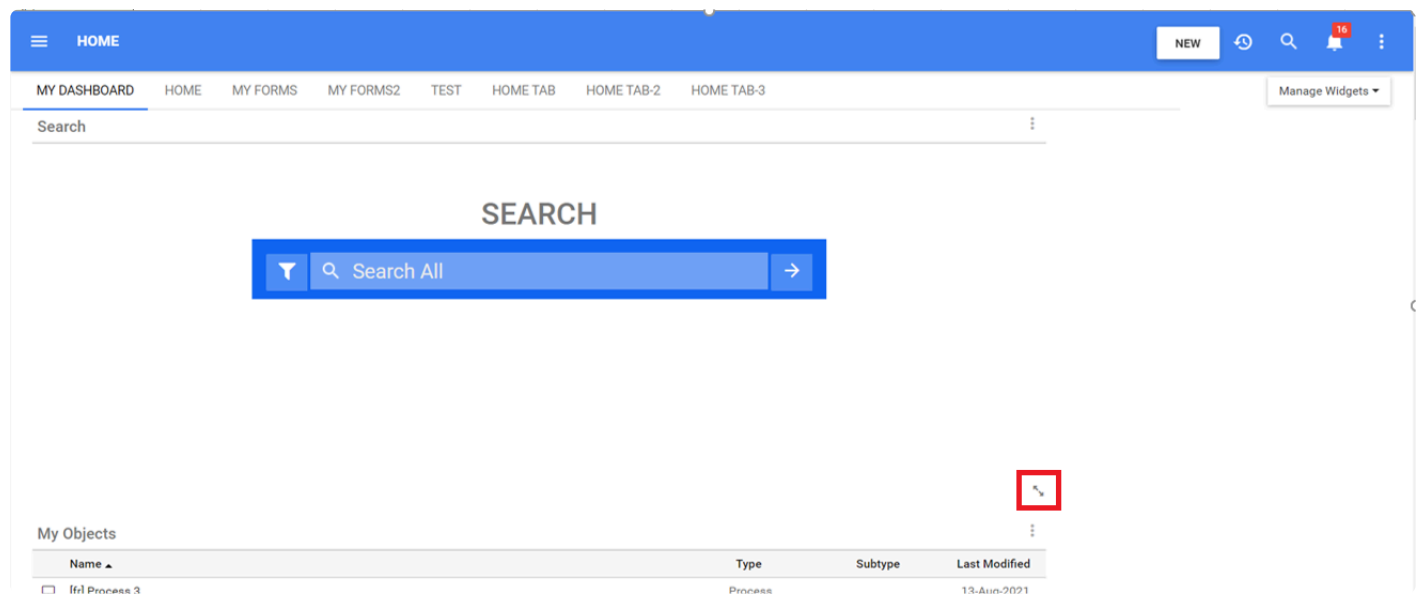
**My Actions Table:**

Name	Action Type	Pending Since	Type
[fr] Planification des produits	Approval	22-Jul-2021	Process
[fr] Gestion de la qualité	Approval	22-Jul-2021	Process
Develop and Manage Human Ca...	Approval	22-Jul-2021	Process

Below the tables, there are pagination controls with arrows and the number '1'.

The 'My Objects' widget is highlighted with a red border. It contains a search bar with the text 'SEARCH' and a 'Search All' button.

There users can adjust the size of the widget by clicking in the arrows in the low right part of the widget. Additionally, move the widget to the preferred location.



The screenshot shows the EPC dashboard with a blue header bar containing 'HOME', 'NEW', and navigation icons. Below the header, there are tabs for 'MY DASHBOARD', 'HOME', 'MY FORMS', 'MY FORMS2', 'TEST', 'HOME TAB', 'HOME TAB-2', and 'HOME TAB-3'. The 'MY DASHBOARD' tab is active, displaying a search bar with the text 'SEARCH' and a 'Search All' button.

The search bar is highlighted with a red border. Below the search bar, there is a table titled 'My Objects'.

**My Objects Table:**

Name	Type	Subtype	Last Modified
[fr] Process 3	Process		13-Aug-2021

A red box highlights the bottom right corner of the widget, showing a small icon for adjusting the widget size.

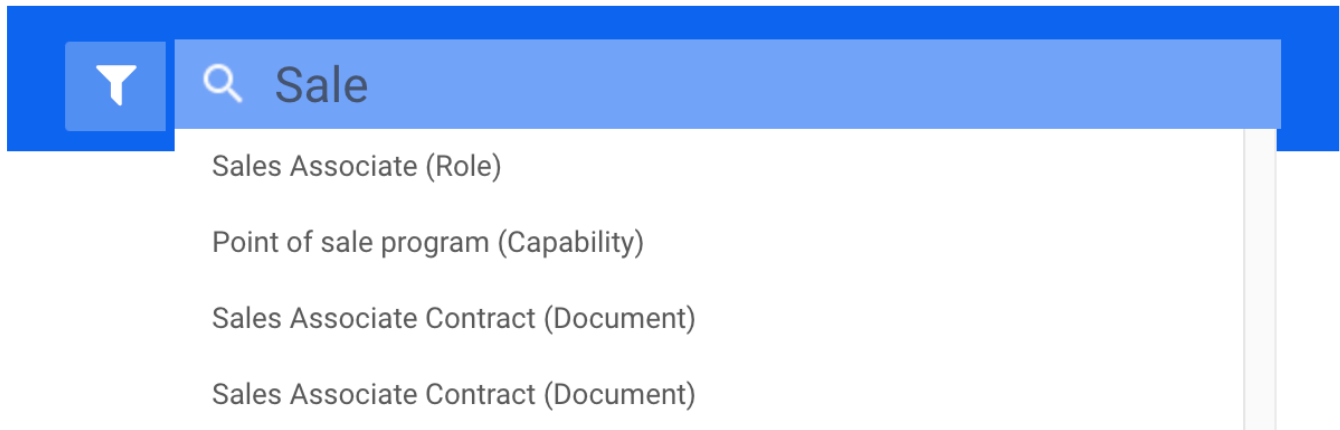
To use the widget, users can click on the **Search All** box, and type the desired object. If the user clicks on an object in the dropdown list, it will directly take them to the Details page of the object



## Search



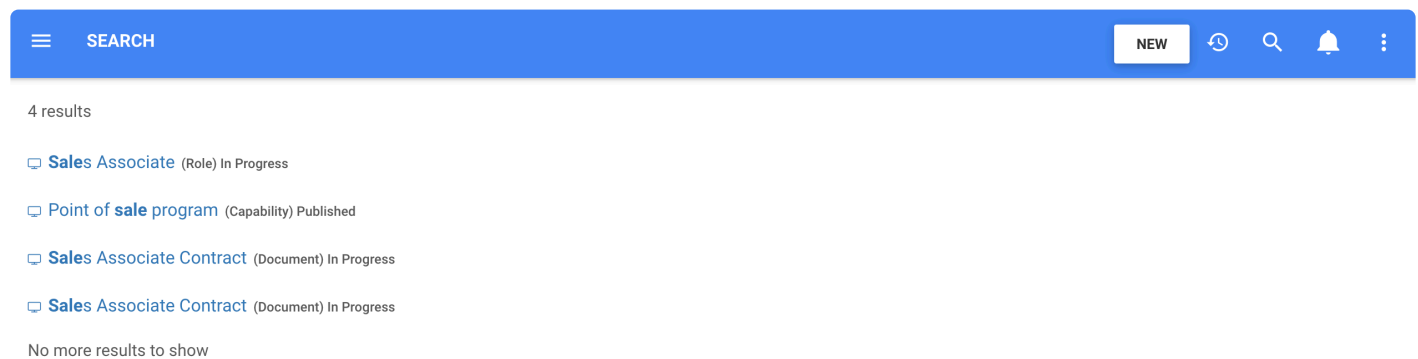
## SEARCH



Sale

- Sales Associate (Role)
- Point of sale program (Capability)
- Sales Associate Contract (Document)
- Sales Associate Contract (Document)

If the user clicks on *enter* on their keyboard, it will take them to the search result page



SEARCH

NEW

4 results

- ☐ [Sales Associate](#) (Role) In Progress
- ☐ [Point of sale program](#) (Capability) Published
- ☐ [Sales Associate Contract](#) (Document) In Progress
- ☐ [Sales Associate Contract](#) (Document) In Progress

No more results to show

Also, users have the option Advance Search, where they can input the module where to look for the information and the time.

## Search



## SEARCH



sale

Sales Associate (Role)

Point of sale program (Capability)

Sales Associate Contract (Document)

Sales Associate Contract (Document)

## Advanced Search



## Filter by type

Process

Performance

Organization

Documents

Risk

Control

Rule

Master Data

Capability

Glossary

## When was it modified



Any time



Within the last week



Past month



Within the past year

Close

Save changes

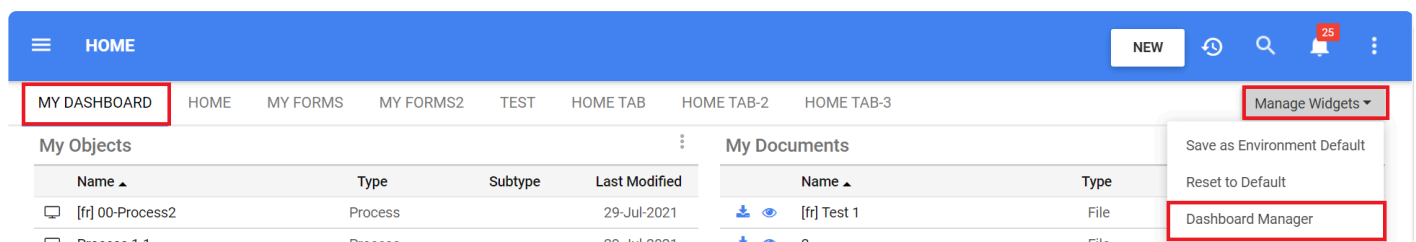
# My Dashboard – My Flow Objects Widget

## Functionality

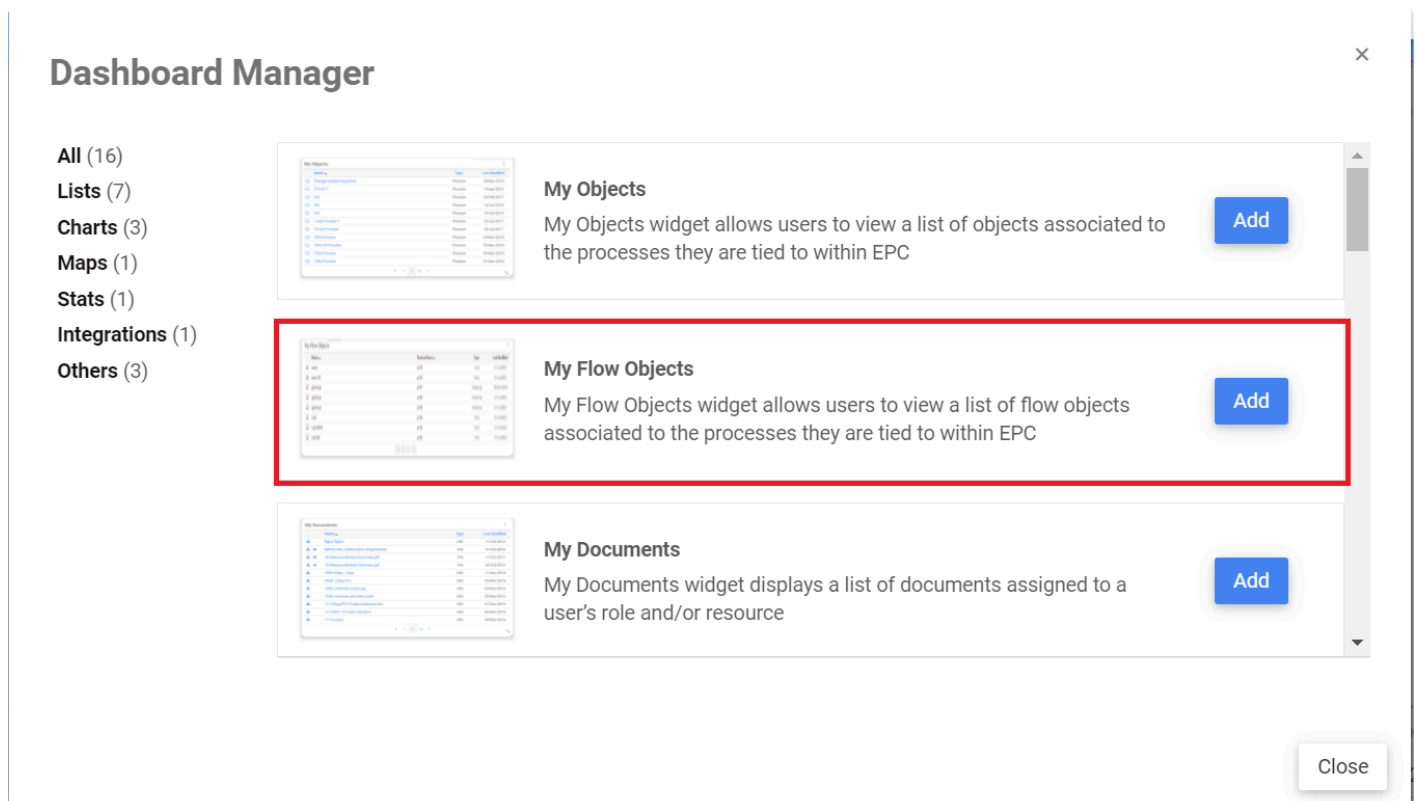
Now in EPC, users can add the widget “My Flow objects” in their dashboard. This feature allows users to review quickly their flow objects linked to the processes to which they have been assign on the RASCI.

## How it works

To use this feature, users go to menu, then Dashboard, there click on Manage widgets. There, a menu extends, users click on Dashboard Manager to access the menu of widgets.



Users click on Add in My Flow Objects. Then, a notification “Widget was successfully added” appears.



Close the window and look for you widget in dashboard page. There the widget displays:

Column 1 : Title/Name of the flow object where the user was assign on RASCI



Column 2 : Process name that the flow object is attached to

Column 3 : Type of Flow Object

Column 4 : Last time object was modified

### My Flow Objects



Name ▲	Process Name ▲	Type	Last Modified
 Contribution to analysis	Problem Management 2020	Task	30-Jul-2021
 Contribution to solution research	Problem Management 2020	Task	23-Apr-2021



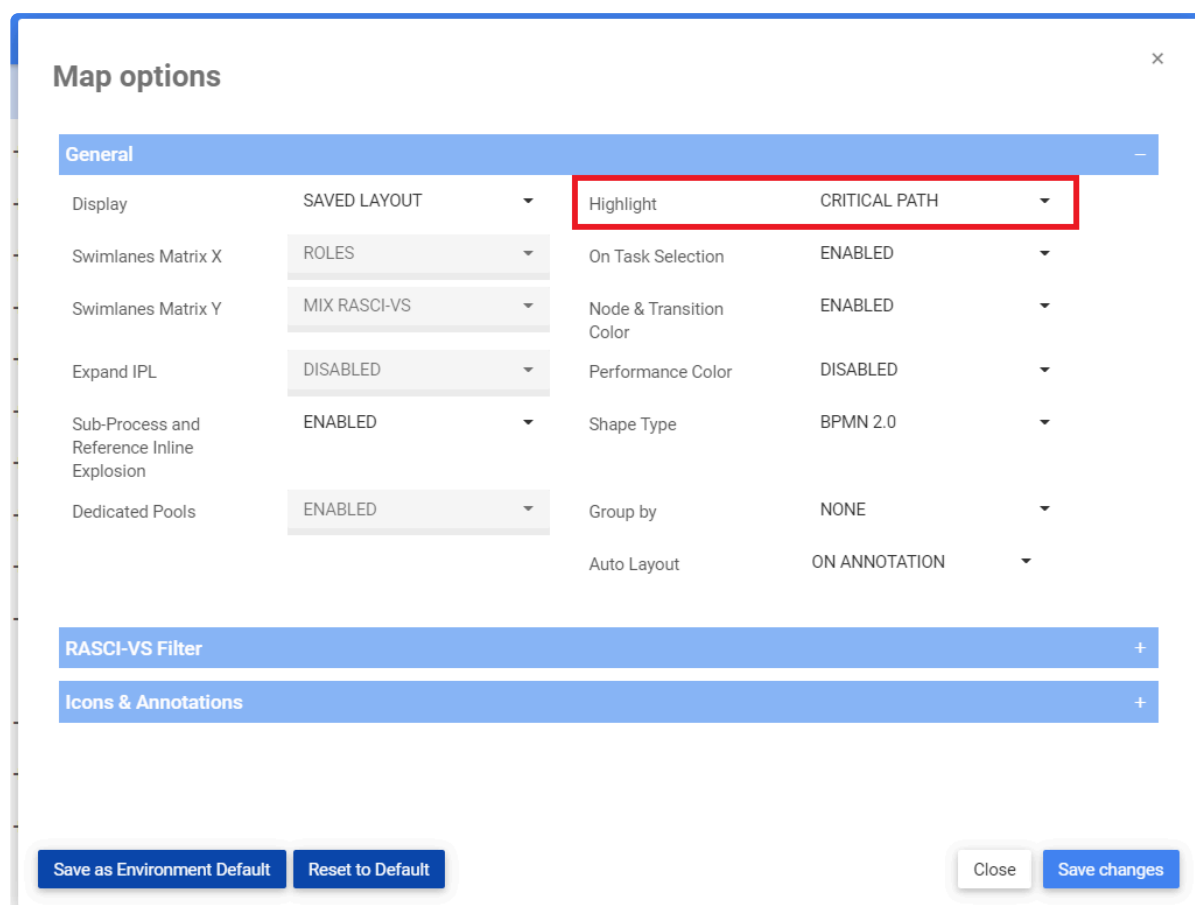
# Process Module – End-User “Happy Path” Map Filter

## Functionality

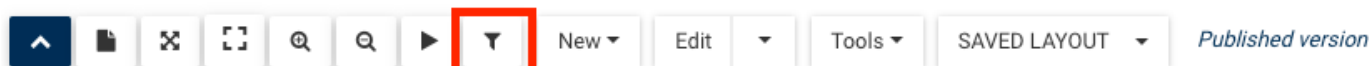
When all process routes and integration points are mapped, processes tend to be extremely heavy and reduce end-user adoption. This feature allows your analysts to map all routes but provide end-users with a simplified view of their process – meaning filter out the clutter and see only what they do 80% of the time

## How it works?

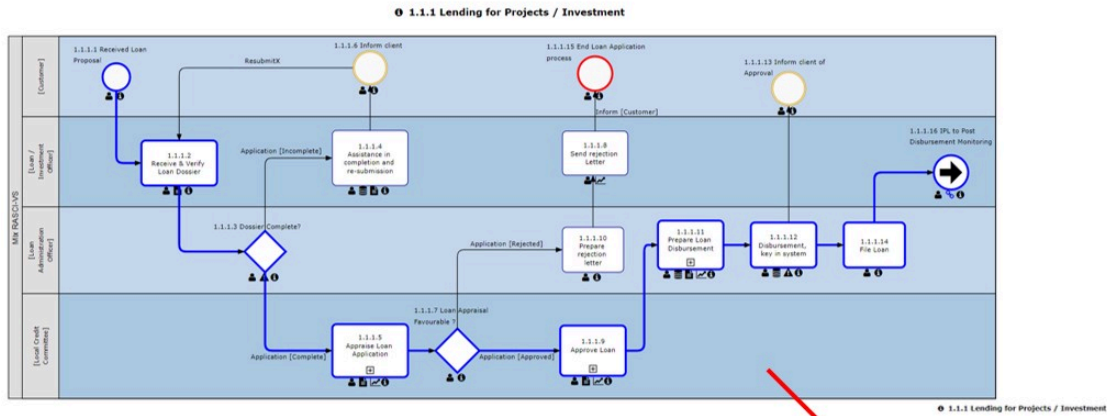
To use this feature, users can activate the highlighted critical path in **map options**. When done, save your changes, then in the Graph page the flow object(s) set as critical in Analysis will be highlighted.



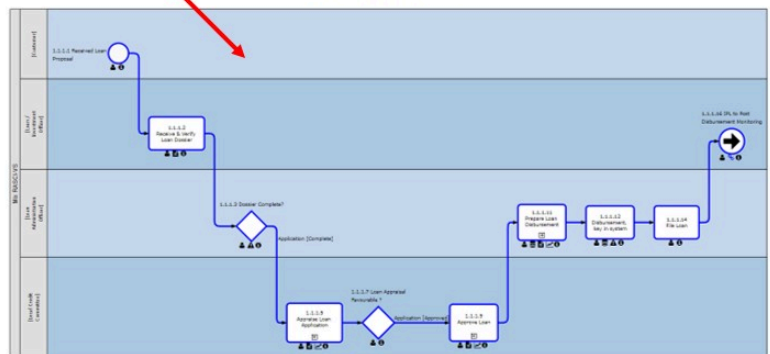
To see only the critical objects, users click on the Filter button, at the top of the graph.



Then only the critical objects are shown:



Critical “Happy Path” Simplified View



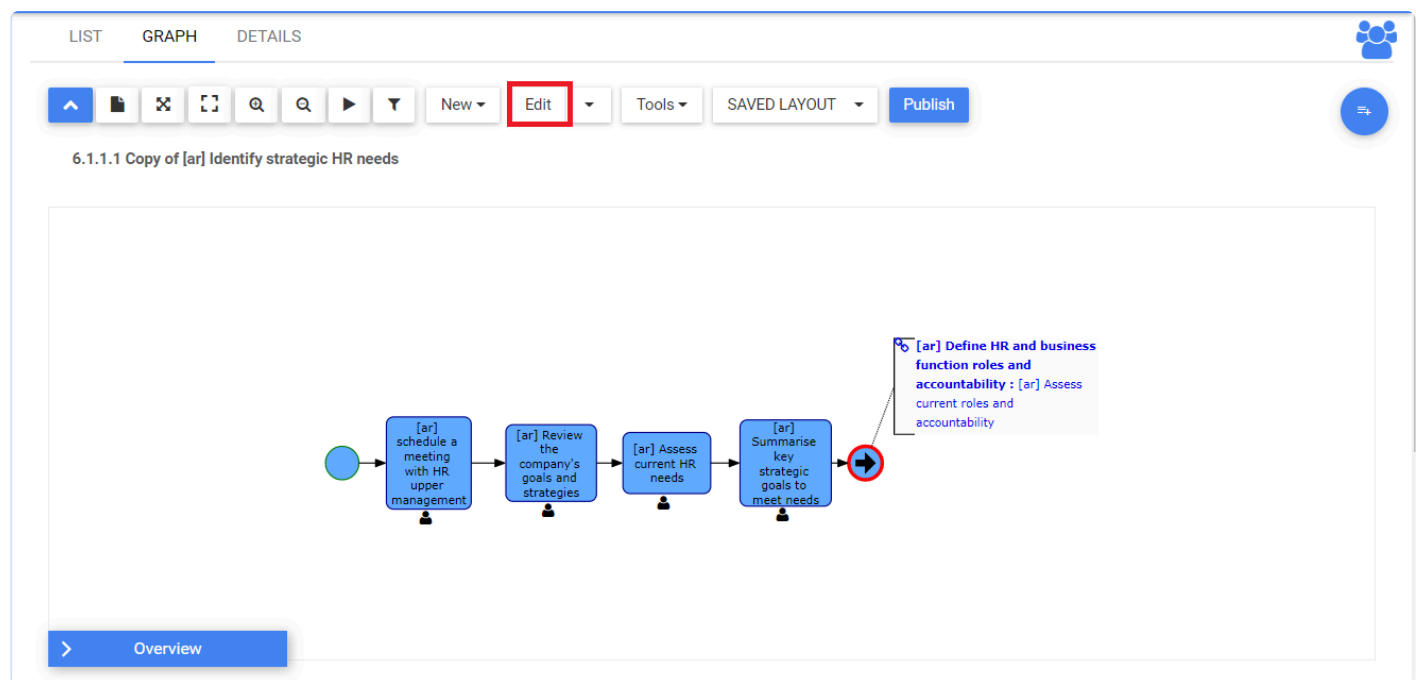
# Process Module – Usability: Toggle Between Map Layouts Settings During Editing

## Functionality

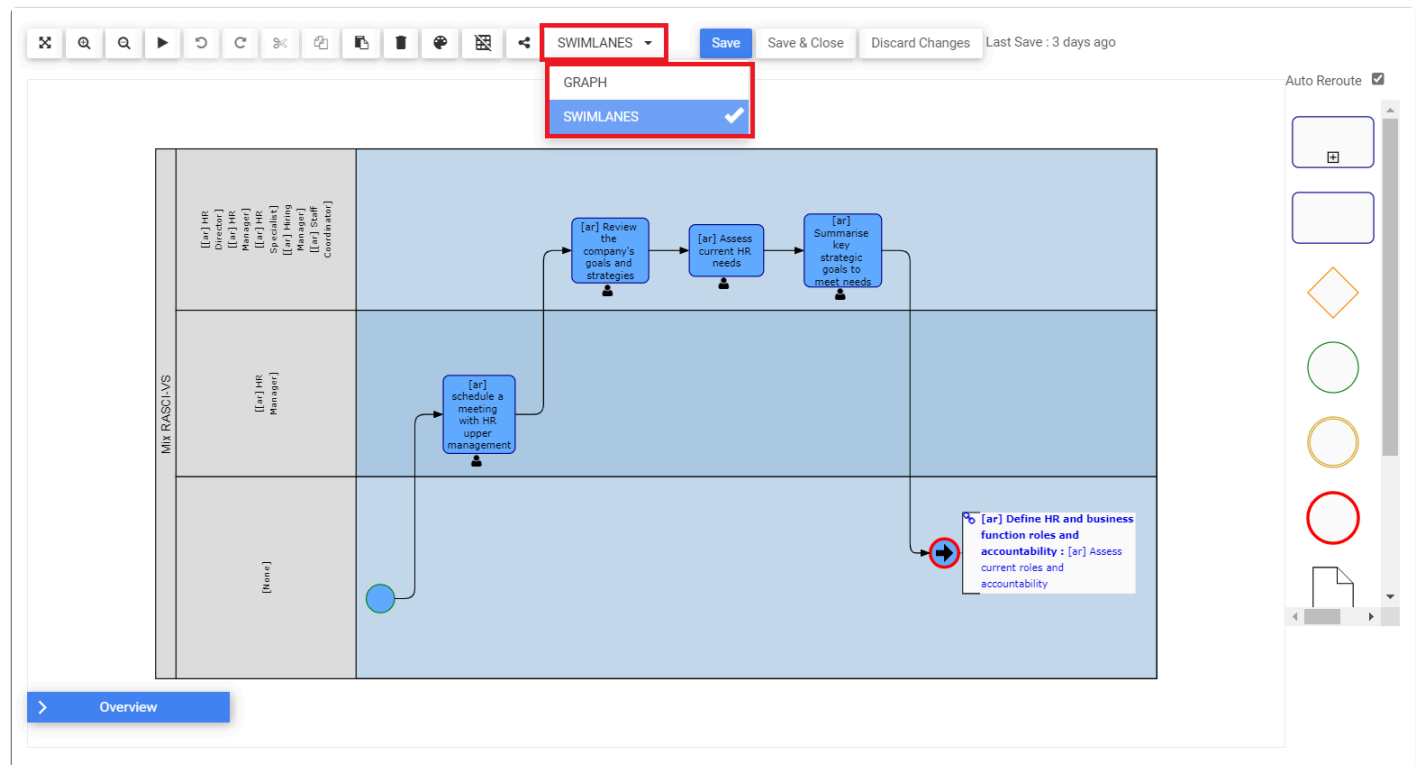
Reduce the number of clicks by easily toggling your Map Layout settings within the drop-down above the map in Edit and View mode. Use the “Saved Layout” option to view exactly what you mapped.

## How it works?

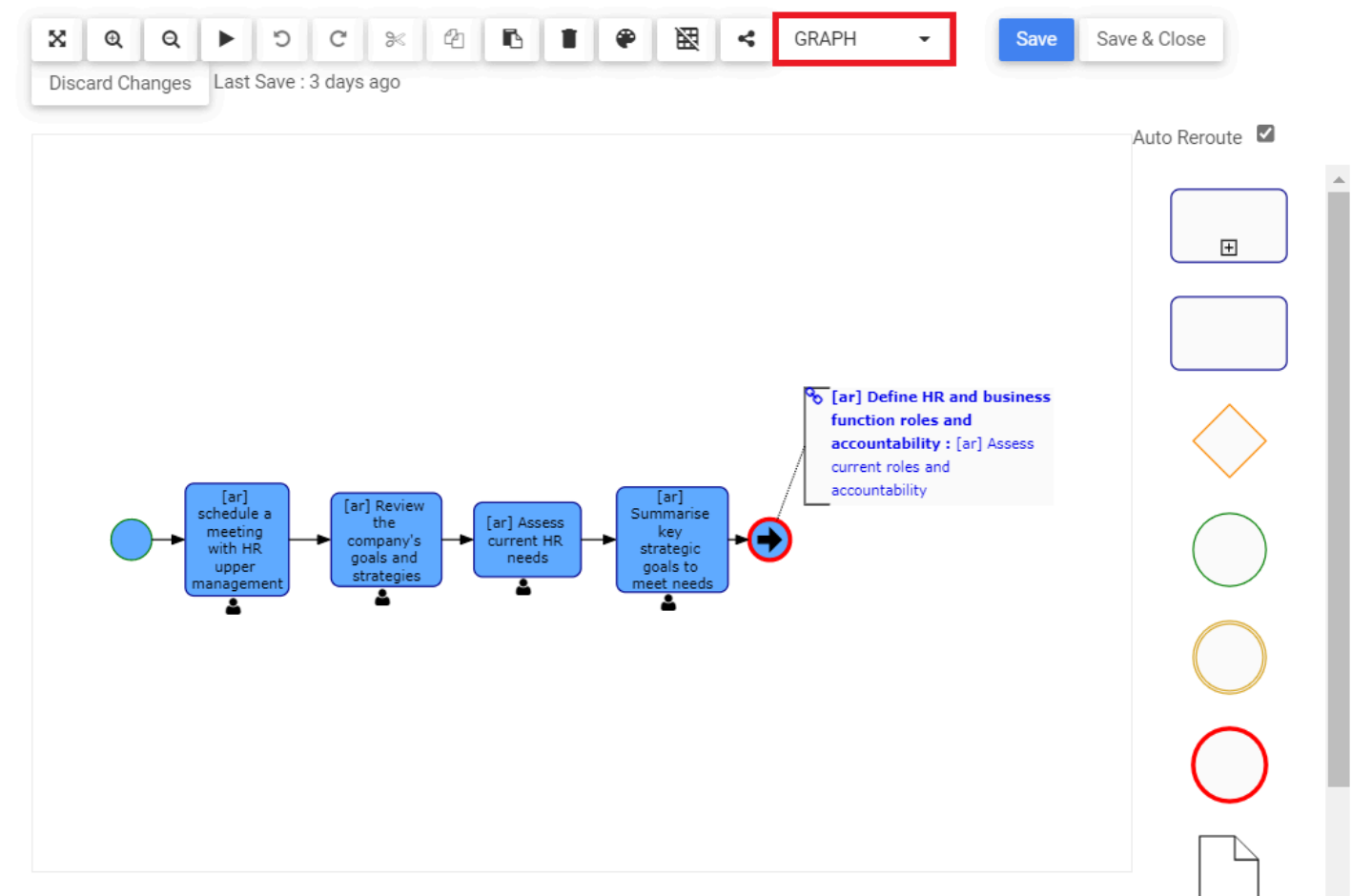
To use the new toggle option, users navigate to the graph page of the process and click on Edit. Then the Edit page opens.



The drop-down menu appears, there users can select between GRAPH and SWIMLANES view.



## View when users select GRAPH





# Process Module – Toggle Between Map Views on the Graph Page

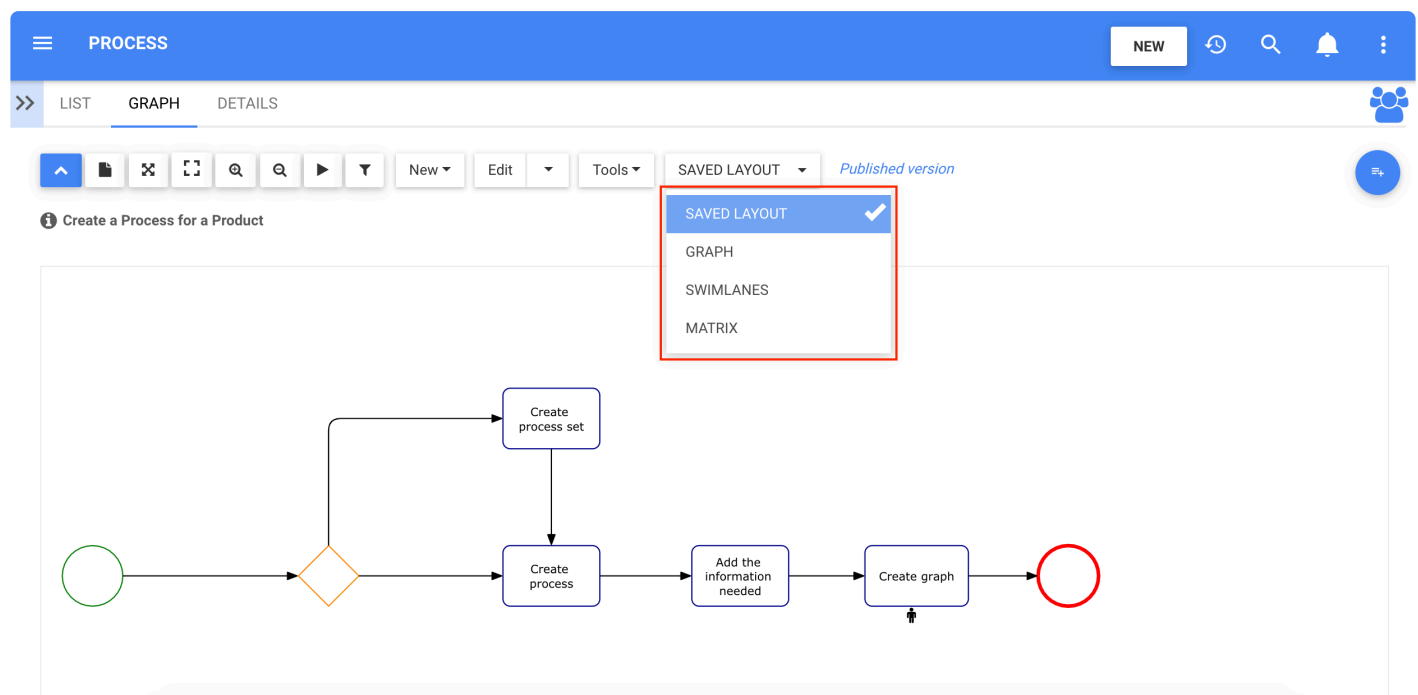
## Functionality

EPC makes it faster and easier to change the view from Graph to Swimlane and Matrix. Users can simply go to the button next to Tools, expand the list and choose what they want to see from Saved Layout, Graph, Swimlanes to Matrix.

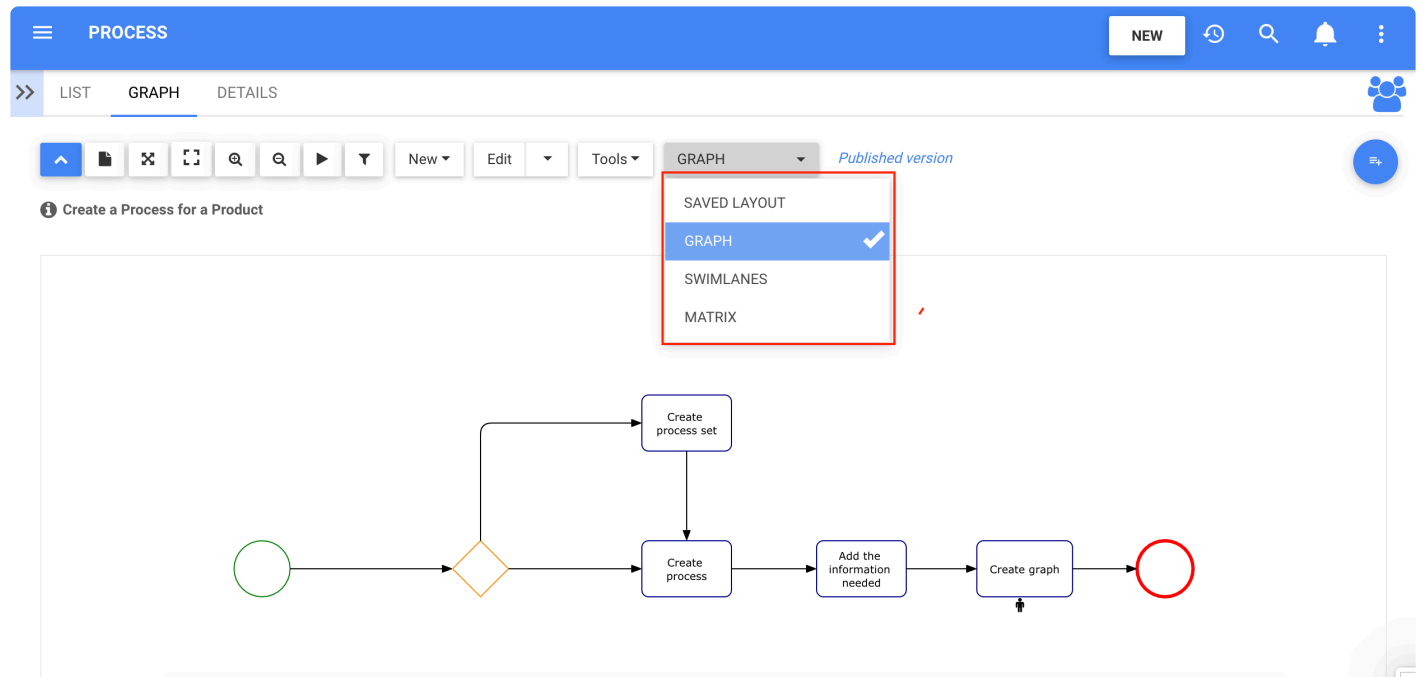
## How it Works?

To use this features, users have to be in the GRAPH page of a process. There users will find the button toggle button SAVED LAYOUT, when the list extends, users can see four options: GRAPH, SWIMLANES, MATRIX, SAVED LAYOUT.

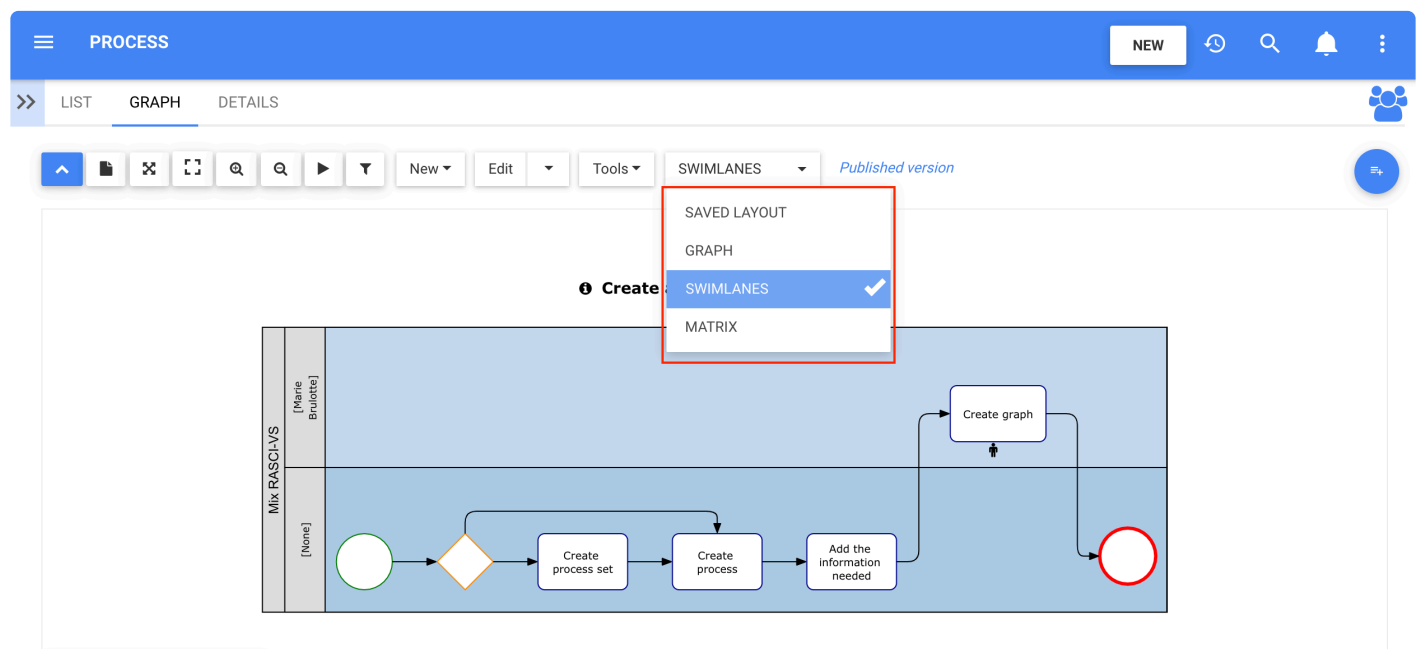
Where Saved Layout is the last graph that was saved.



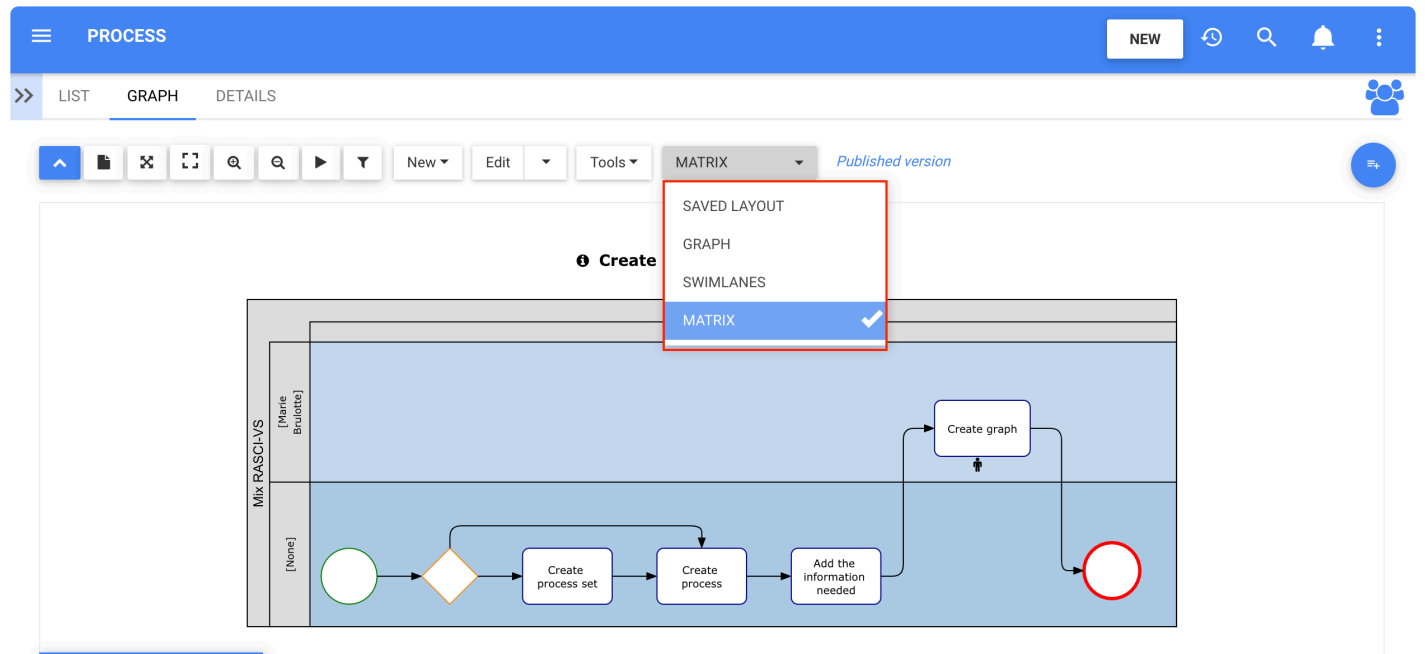
View in GRAPH



## View in SWIMLANES



## View in MATRIX



# Process Module – Usability: Create & Map Button

---

## Functionality

Now in EPC to reduce the number of clicks required when creating a new process, a new Create & Map button has been added which allows you to immediately start mapping the flow-objects upon naming the process. Create & Close option is still available for when you quickly want to build-out the architecture but are not yet ready to map the details.

## How it Works?

To use this new feature users have to create a new process. User can create a new process by clicking on new in 4 places.

- in DETAILS page > Click on New > Click on Process
- in GRAPH page > Click on New > Click on Process
- Right clicking in a set or process > Select New Process
- Click on button NEW on the top left of the page > Select Process > Select Process

Then a form to Add a new process opens to input the information about the new Process. After added all the information needed in the process, users click on Create and Map Button.

Add New Process

Editing Language  
ENGLISH

GENERAL

PROPERTIES

FLOW OBJECTS

Create & Close

Create & Map

What is this Process?

+

What are the Responsibilities?

+

Which Documents are used?

+

How is Performance measured?

+

Which Business Rules are applicable?

+

Which Risks are applicable?

+

Which Controls are applicable?

+


Which Master Data are used?

+

Cancel

Create & Close

Create & Map

When users click on the button  to create and map the new Process. Then users are redirected to the edit page of the graph so they can start designing their process.

[illegible]

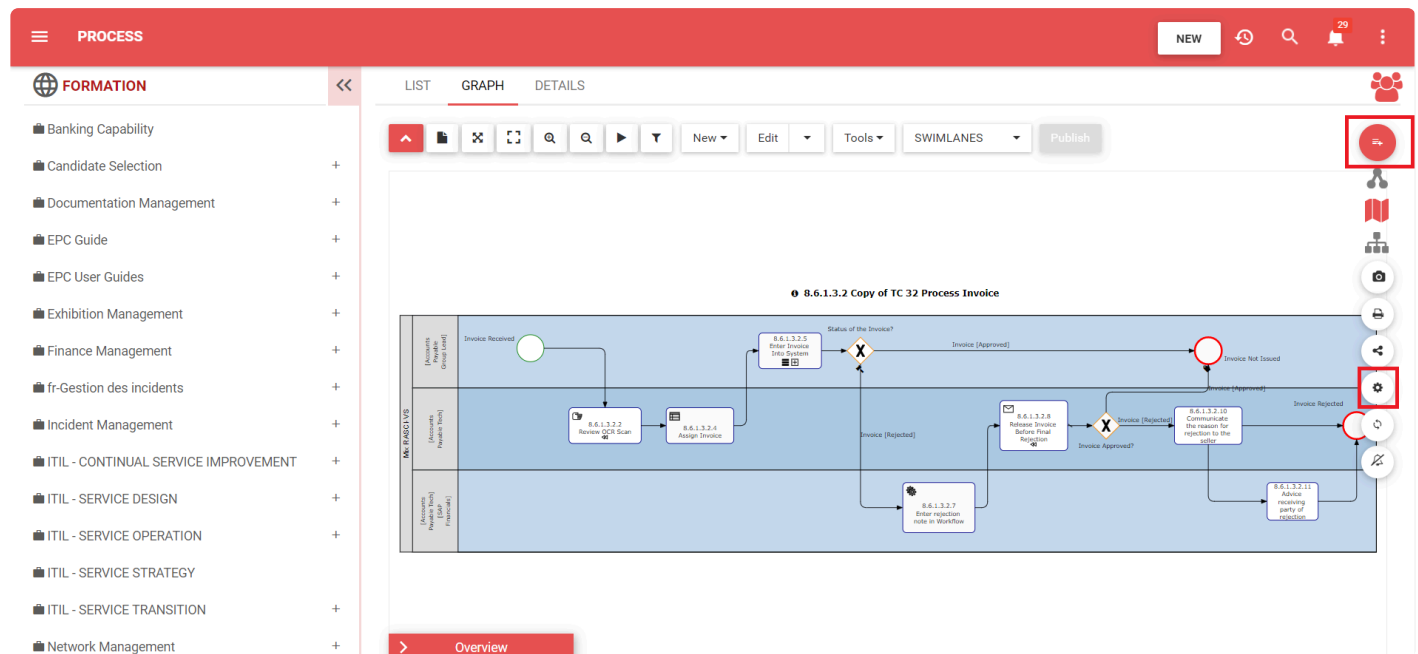
# Process Module – Right to Left language Compatibility

## Functionality

Process maps in EPC 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

## How it works?

To activate this feature, users have to be in Graph page of a process and click on Open button menu in the right side. Then click on the settings.



Map options open, there users can change the Orientation of the graph from Left to Right to Left. To be able to do that users have to have display set on GRAPH, SWIMLANE or MATRIX.

## Map options ×

General —

Display	SWIMLANES ▼	Highlight	NONE ▼
Swimlanes Matrix X	GRAPH	On Task Selection	ENABLED ▼
Swimlanes Matrix Y	SWIMLANES ✓	Node & Transition Color	ENABLED ▼
Expand IPL	MATRIX	Performance Color	DISABLED ▼
Sub-Process and Reference Inline Explosion	DISABLED ▼	Shape Type	BPMN 2.0 ▼
Dedicated Pools	DISABLED ▼	Group by	NONE ▼
Orientation	LEFT-TO-RIGHT ▼	Auto Layout	ON ANNOTATION ▼

RASCI-VS Filter +

Icons & Annotations +

Save as Environment Default

Reset to Default

Close

Save changes

## Map options ×

General

Display	SWIMLANES	▼	Highlight	NONE	▼
Swimlanes Matrix X	ROLES (12)	▼	On Task Selection	ENABLED	▼
Swimlanes Matrix Y	MIX RASCI-VS	▼	Node & Transition Color	ENABLED	▼
Expand IPL	DISABLED	▼	Performance Color	DISABLED	▼
Sub-Process and Reference Inline Explosion	DISABLED	▼	Shape Type	BPMN 2.0	▼
Dedicated Pools	DISABLED	▼	Group by	NONE	▼
Orientation	LEFT-TO-RIGHT	▼	Auto Layout	ON ANNOTATION	▼

RASCI-VS Filter

LEFT-TO-RIGHT ✓

+

Icons & Annotations

RIGHT-TO-LEFT

+

Save as Environment Default

Reset to Default

Close

Save changes

If Display is set to SAVED LAYOUT, then orientation button is disabled and orientation is set to Left to Right by default.



## Map options

x

### General

Display	SAVED LAYOUT	▼	Highlight	NONE	▼
Swimlanes Matrix X	ROLES (12)	▼	On Task Selection	ENABLED	▼
Swimlanes Matrix Y	MIX RASCI-VS	▼	Node & Transition Color	ENABLED	▼
Expand IPL	DISABLED	▼	Performance Color	DISABLED	▼
Sub-Process and Reference Inline Explosion	DISABLED	▼	Shape Type	BPMN 2.0	▼
Dedicated Pools	DISABLED	▼	Group by	NONE	▼
Orientation	LEFT-TO-RIGHT	▼	Auto Layout	ON ANNOTATION	▼

### RASCI-VS Filter

+

### Icons & Annotations

+

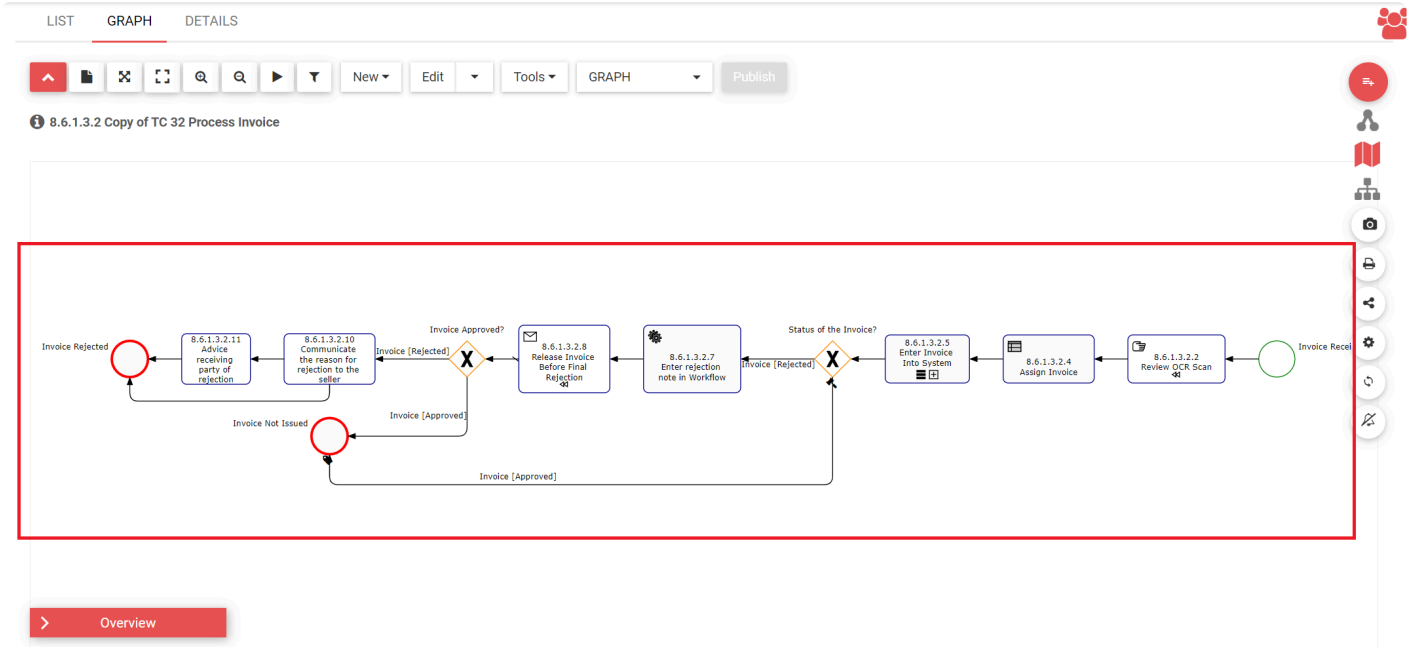
Save as Environment Default

Reset to Default

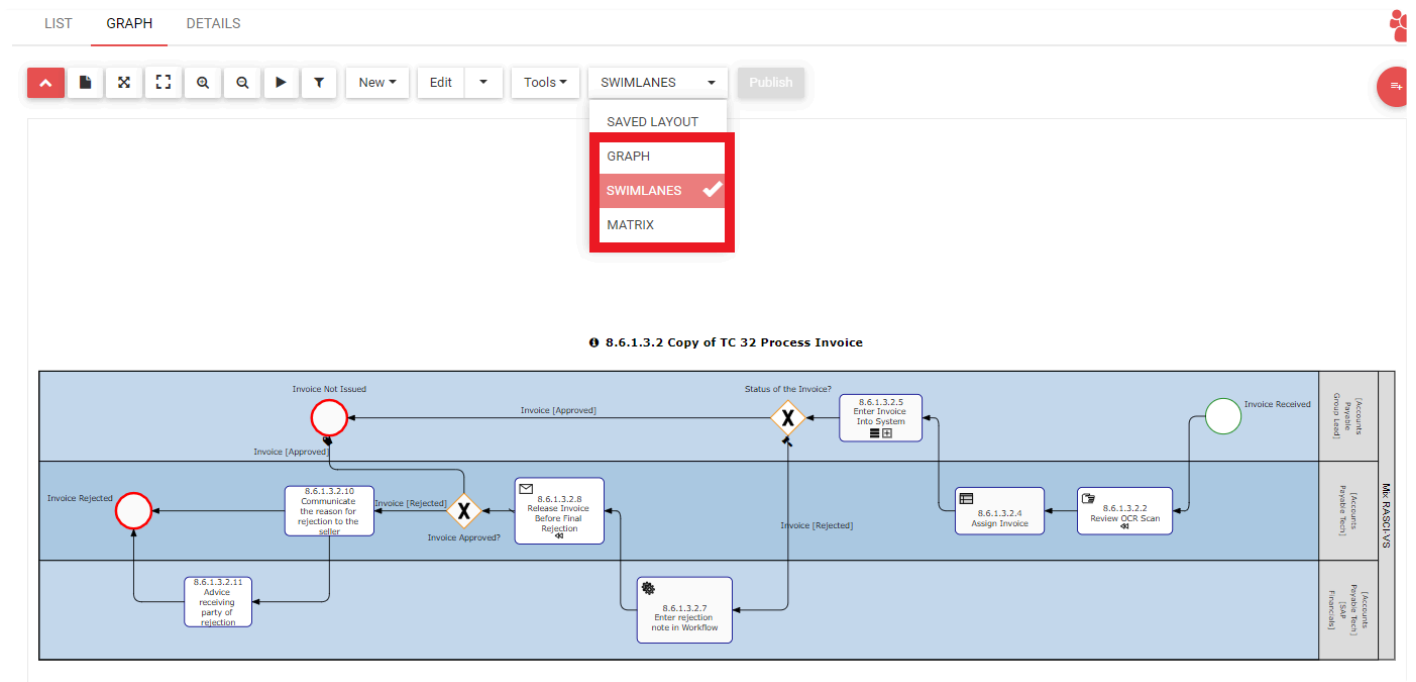
Close

Save changes

Once users have selected Right-to-Left and save changes in Map Options. Then the graph is displayed with orientation Right to left in the selected layout.

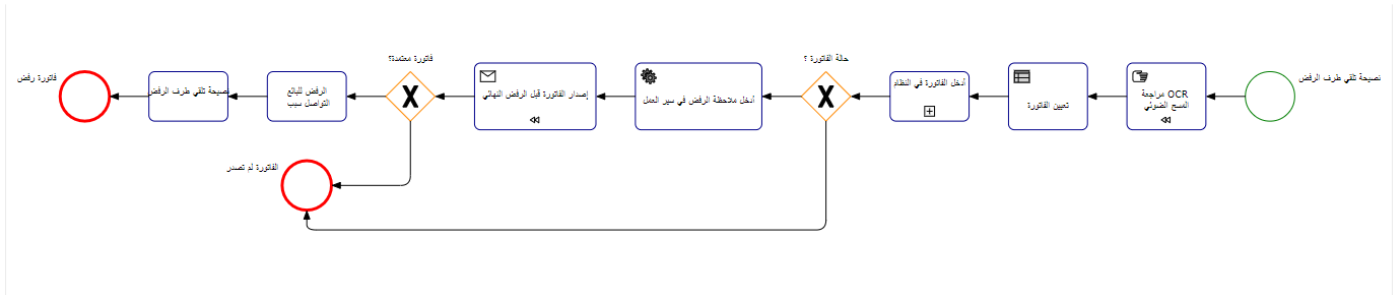


To see the graph in a different layout, users can change it in the top by selecting GRAPH, SWIMLANES or MATRIX. If users select SAVED LAYOUT, then users will see the graph in Orientation Left to Right as graph can only be edited and saved on that orientation.

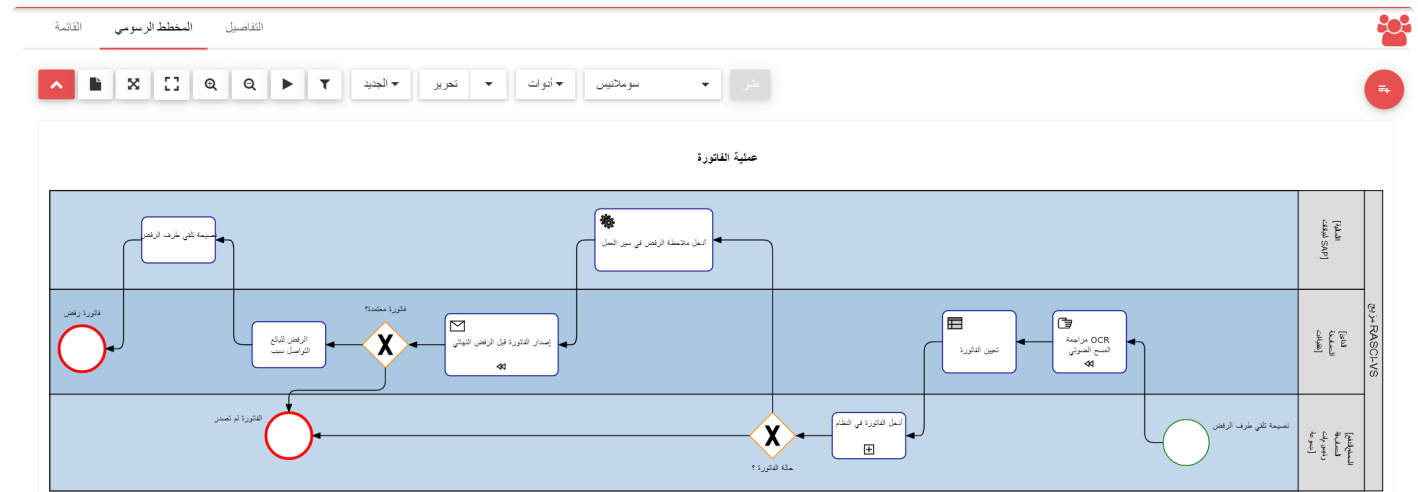


Now, our Arabic, Farsi and Hebrew users can create their process and then view, print and download its object book with Right to Left orientation.

View of the graph when layout is in graph and orientation is Right to Left.



View of the graph when layout is in swimlanes and orientation is Right to Left.



to download the object book with graph orientation set to Right to left, users can click on the object book of the process and change the orientation to Left to Right.



## Template Selection

		Name ▲	Category	Subtype	Status
<input checked="" type="checkbox"/>		[Default Template] Analysis (A4 - Landscape)			Published
<input type="checkbox"/>		[Default Template] Analysis (A4 - Landscape)			Published
<input type="checkbox"/>		[Default Template] Approval			Published
<input type="checkbox"/>		[Default Template] Approval			Published
<input type="checkbox"/>		[Default Template] Process Audit (A4 - Landscape)			Published
<input type="checkbox"/>		[Default Template] Process Audit (A4 - Landscape)			Published
<input type="checkbox"/>		[Default Template] Process Map Only (A4 - Landscape)			Published
<input type="checkbox"/>		[Default Template] Process Map Only (A4 - Landscape)			Published
<input type="checkbox"/>		[Default Template] Snapshot (A4 - Landscape)			Published
<input type="checkbox"/>		[Default Template] Snapshot (A4 - Landscape)			Published



**Map Orientation** Left-to-right

**Map Layout** Left-to-right

**Map Page Break Options** Top-to-bottom (Auto-Layout)

☒ Include all children

Cancel

Done



To print the process with orientation Right to Left, users can change the orientation on the Multi Page Layout Print Setting and set it to Right to Left.

# Multi-Page Layout Print Settings

x

## General

Print Mode : Manual Print

Orientation: Left-to-right  
Left-to-right  
Right-to-Left  
Top-to-bottom (Auto-Layout)

## Page Setting

Page Layout : Landscape

Page Size : Letter

Header & Footer : None

Close

Print

# Process Module – Quick Mapping Shape Stencil

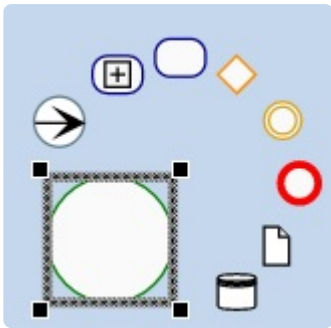
---

## Functionality

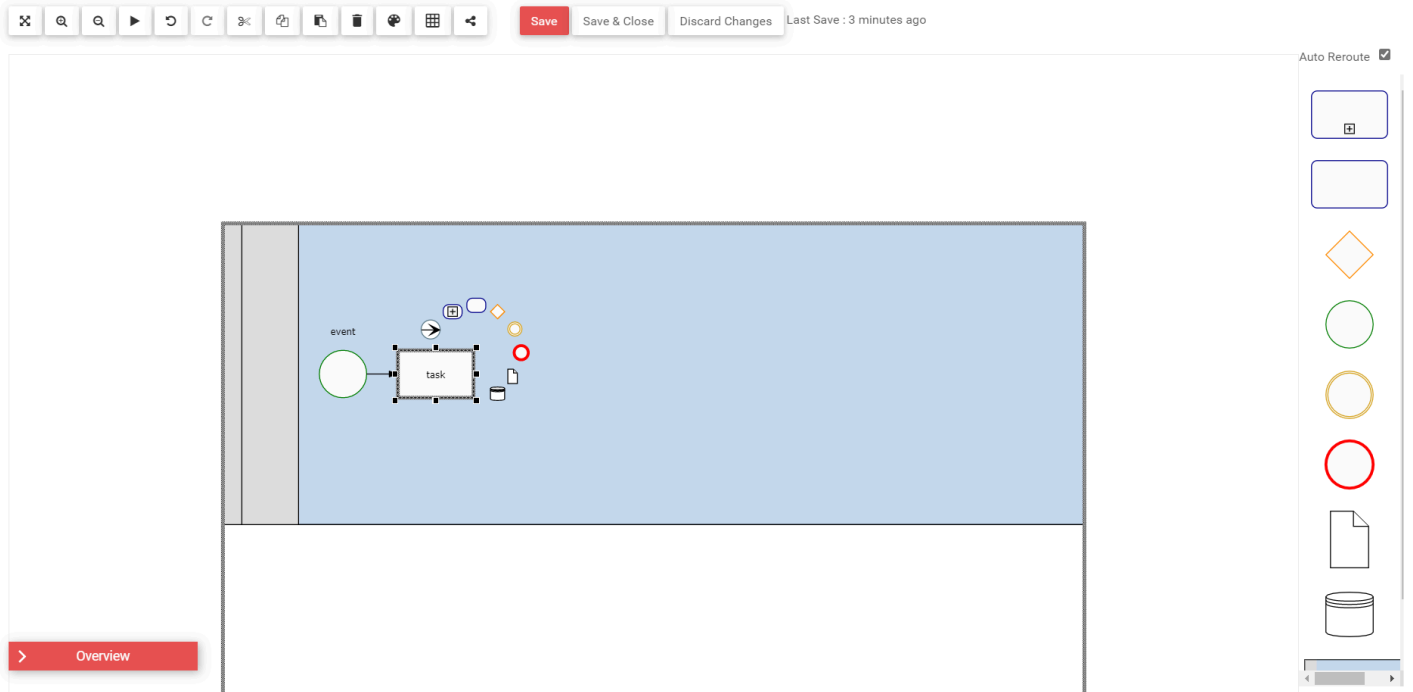
In EPC, editors can now quickly add the next flow-object during mapping by simply selecting the next shape from the shape stencil and then clicking where to place the shape on the map. No longer do users need to drag & drop a shape from the side panel nor manually link the transitions between each shape.

## How it works

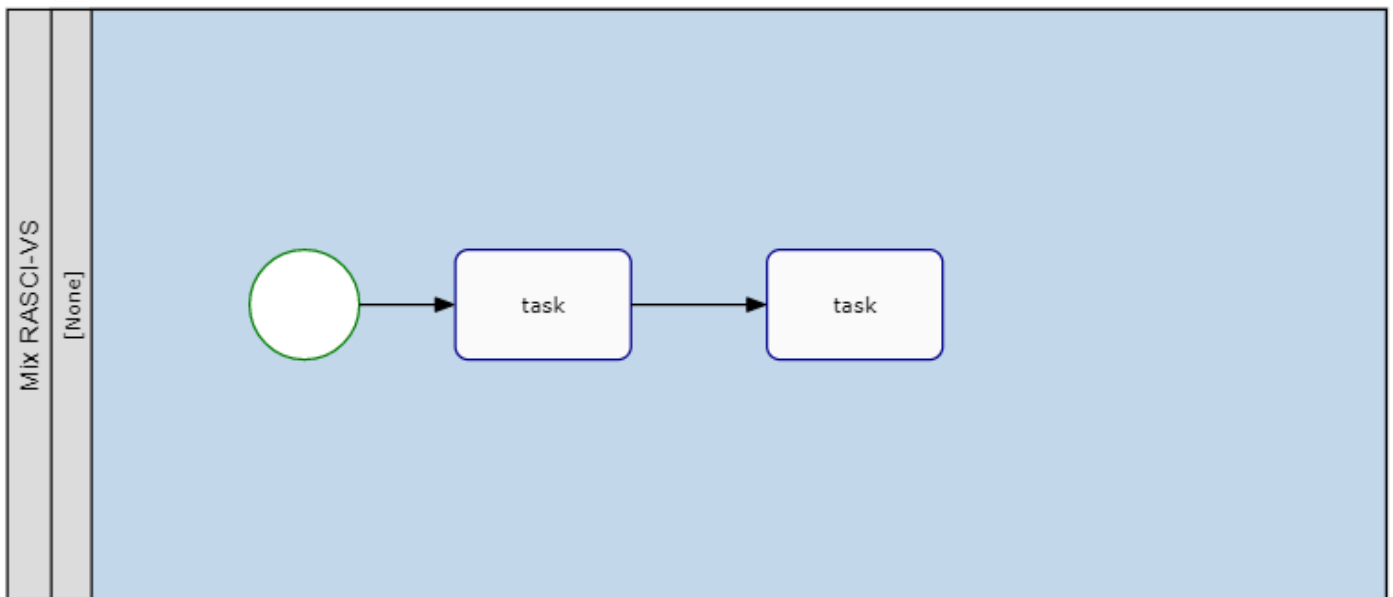
To start using this feature, users have to be in edit mode of graph. If users are creating a new graph, then they have to drag the first event start to the swimlane. If the process already exist then users just click on the shape and the list of object appears around the item to select the next shape in the process.



Then select the desired shape to add and place it.



In the example the user chose a task, then every time users double clicks on the task, the user will be able to place another task until the user changes the object selected in the quick menu.



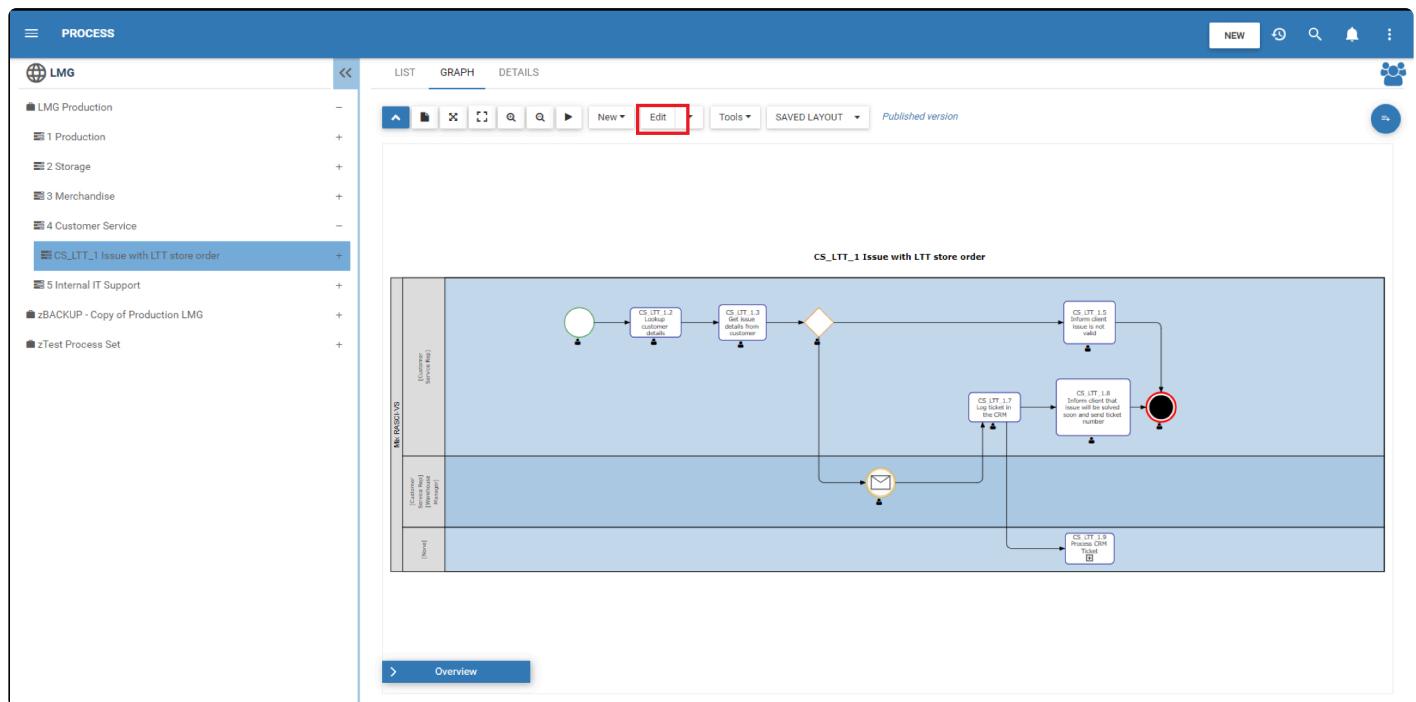
# Process Module – Usability: Edit Flow Object Analysis Data While Mapping

## Functionality

In order to provide analysts with better process visibility and a more efficient way to process analysis data (duration, delay, cost, value-added, critical path, etc), EPC now provides the ability to directly add / edit analytical data from the process map (including multi-select!) instead of having to go to the analysis tab in the governance module.

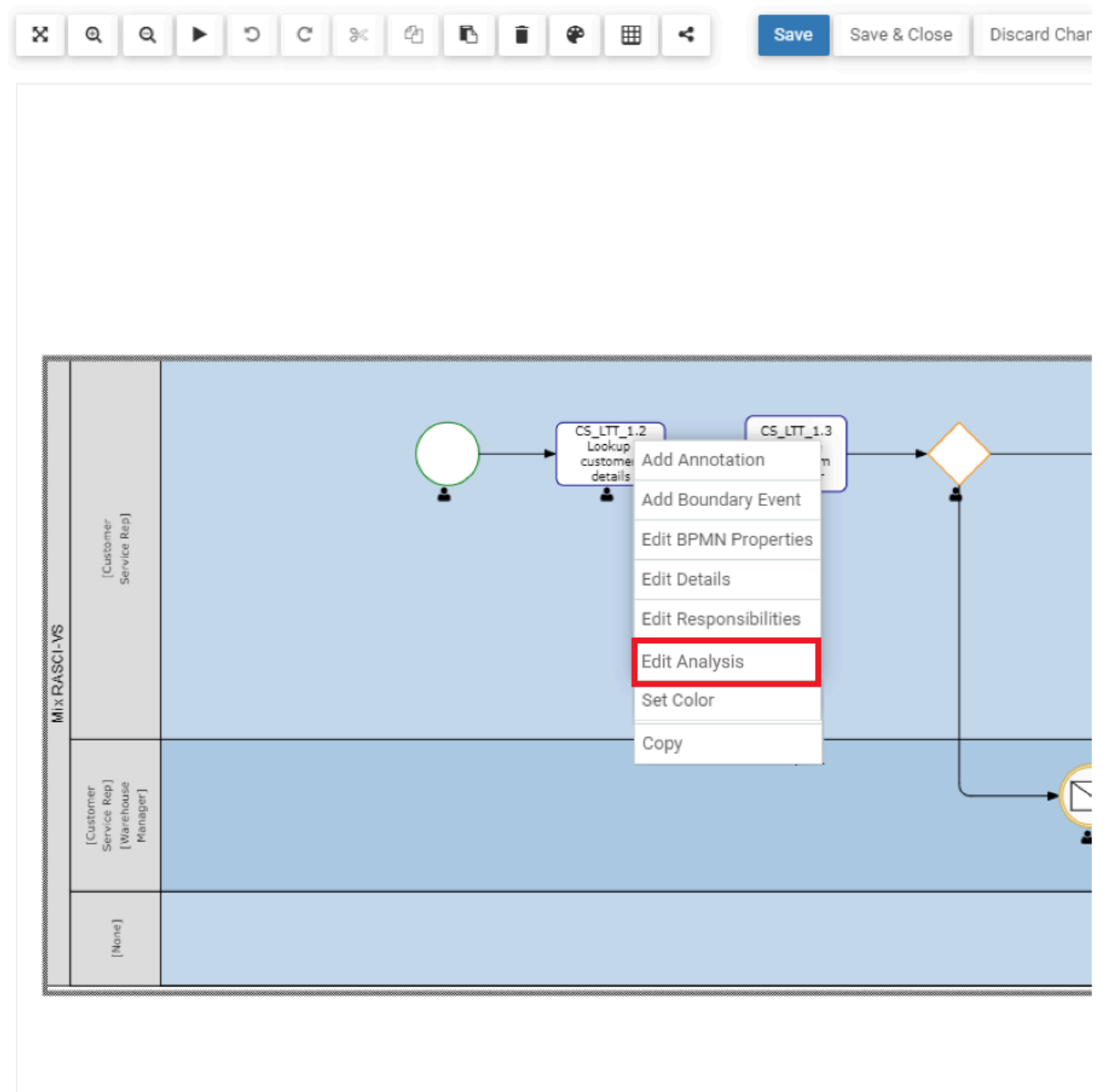
## How it works?

To use this feature, users go to GRAPH from process module, then click on Edit



Once in Edit graph, users can select one or more flow object and right click to open the extendable list. Also, when right clicking in the space around the graph, all the objects are selected and users can edit Analysis Data of all the flow objects.





When selecting Edit Analysis then a window opens with all the labels to be edited.

## Edit Analysis

<input type="checkbox"/> Path(s)	<u>High Risk</u>		
<input type="checkbox"/> Value Type	<u>Value Enabling</u>	<input type="checkbox"/> Waste Type	<u>Inventory</u>
<input type="checkbox"/> # Operators	<u>15</u>	<input type="checkbox"/> # Execution	<u>37</u>
<input type="checkbox"/> Actual Cost	<u>145,56</u>	<input type="checkbox"/> Processing Time	<u>0 00 : 60 : 00</u> Day Hour Min Sec
<input type="checkbox"/> Waiting	<u>0 00 : 30 : 00</u> Day Hour Min Sec	<input type="checkbox"/> Inventory	<u>1 00 : 00 : 00</u> Day Hour Min Sec
<input type="checkbox"/> Transport	<u>0 01 : 30 : 00</u> Day Hour Min Sec	<input type="checkbox"/> Change Over	<u>0 50 : 00 : 00</u> Day Hour Min Sec

Cancel

Done

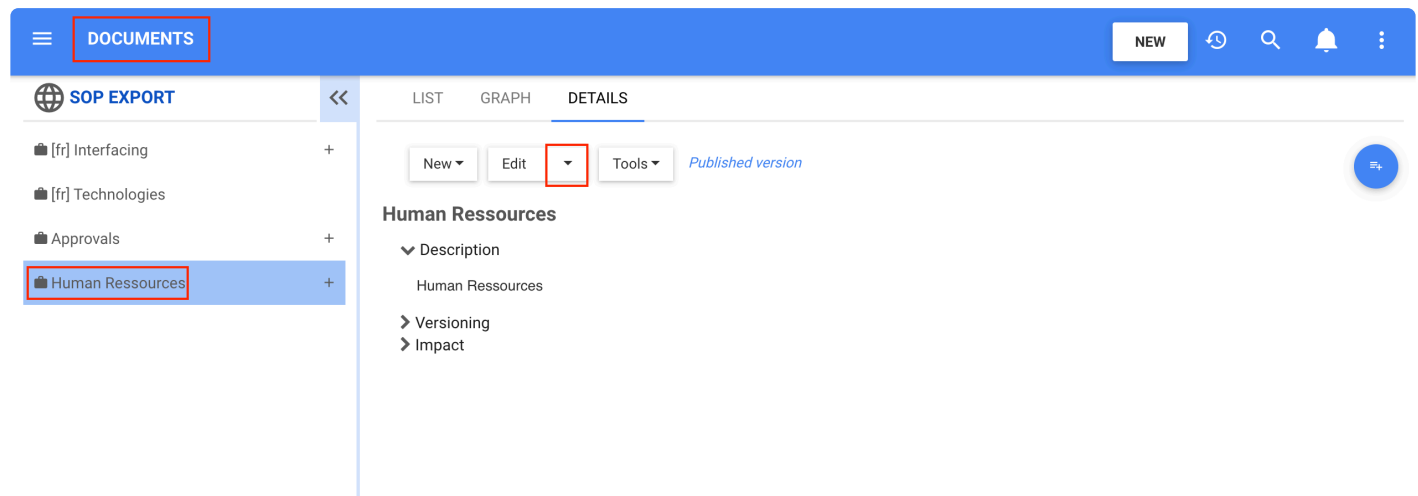
# Documents Module – Records Management

## Functionality

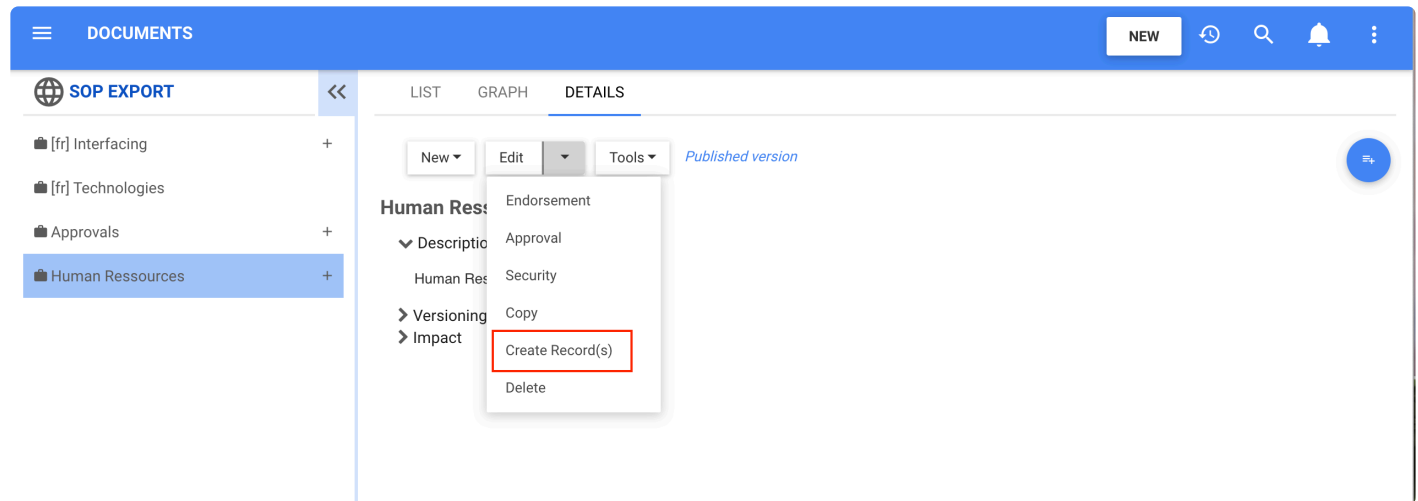
Now in EPC, users can create Record(s) directly from standardized forms & templates. This new feature automatically selects the required documents that need to be completed based on the scenario (eg. GxP related project requires all docs tagged with mandatory for GxP projects). Moreover, during the creation process the system provides the ability to tag all records with specific attributes at once (eg. Project or Product Name/Number).

## How it works?

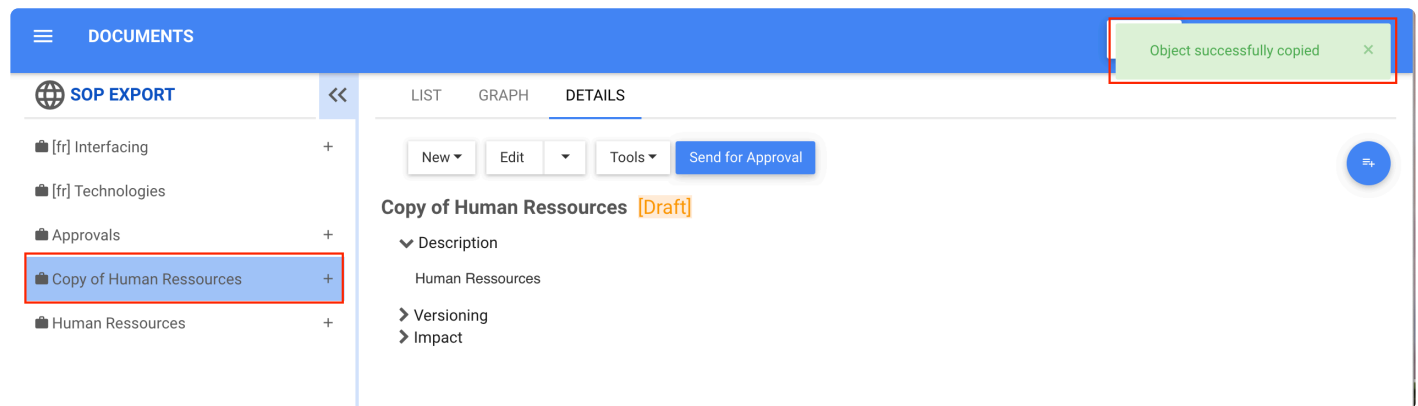
To use this feature, users have to select a set or folder on the tree of Documents module and be in DETAILS page.



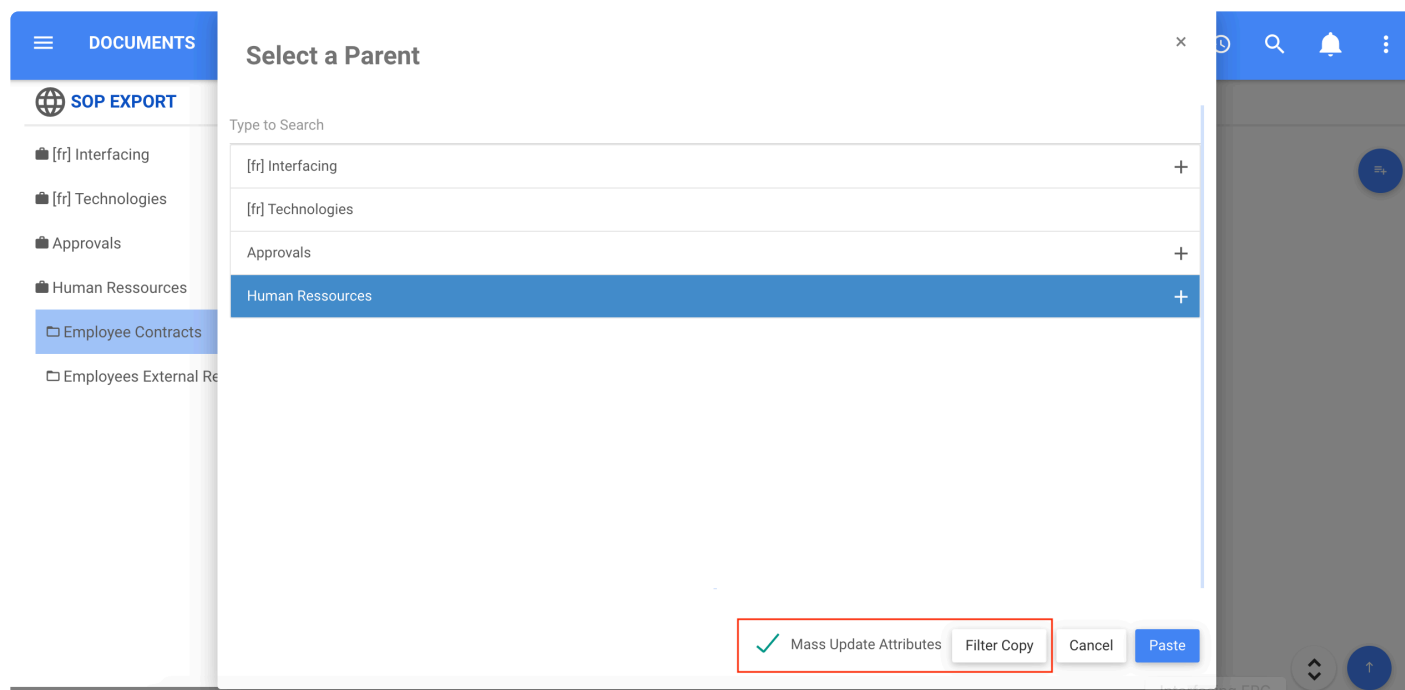
There, users click on the arrow next to Edit. Once the extendable list appears, users click on Create Records



If the user selected a set, then the copy of the record is created right away.



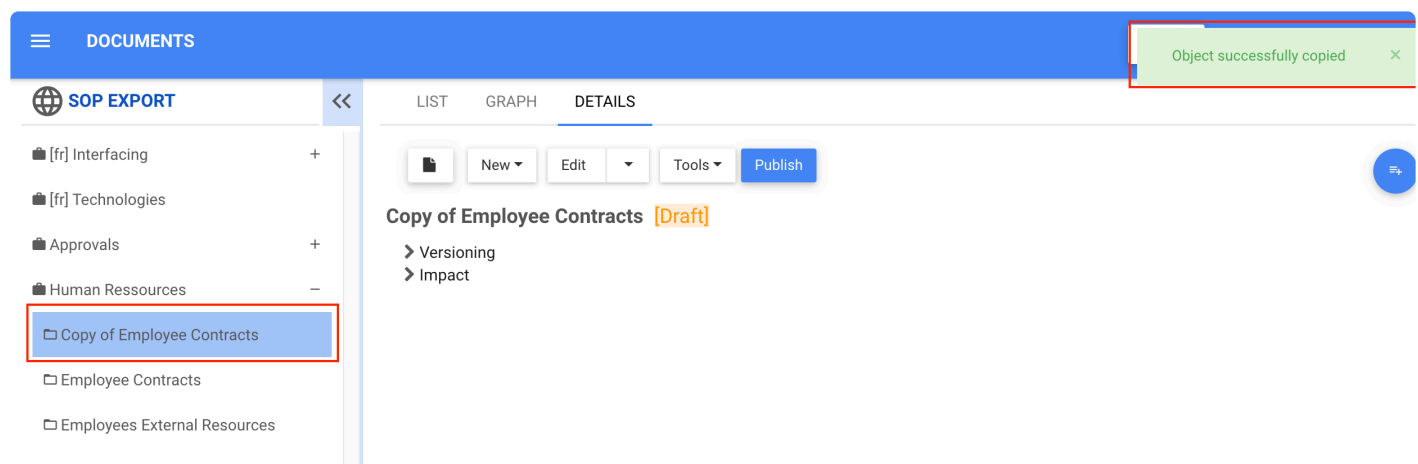
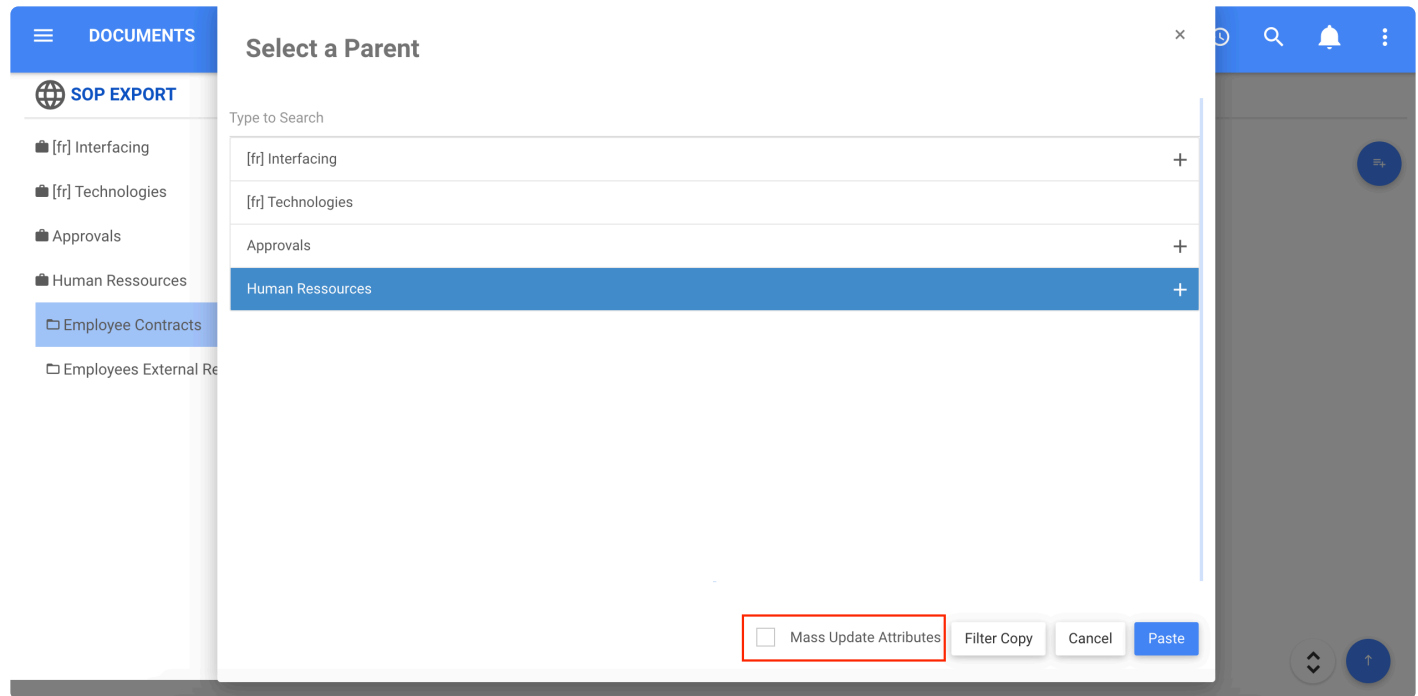
If the user selected a folder, then the user can select where to create this records, filter the copies by attribute and decide to mass update the attributes or not.



The Filter by Attributes Values form is the same as the attributes form. There, users can select the attribute to filter the document with those characteristics.

The screenshot shows the 'Filter by Attribute Values' form. It has a title bar with the text 'Filter by Attribute Values' and a 'Save & Close' button. Below the title bar is a section titled 'What are the Attributes?' with a table of attributes and their values. The table has two columns: 'Attribute' and 'Value'. The attributes listed are: '[ar] Input' (Name), '[ar] ISO Norm-Referenz' (SELECT ONE OR MANY VALUES), '[ar] Output' (Name), '[ar] Physischer Standort' (SELECT ONE OR MANY VALUES), '[ar] ReferenceGuide Bezug' (Name), 'Cost' (Name, USD United States dollar), 'Country India' (SELECT ONE OR MANY VALUES), and 'Criticality' (SELECT ONE OR MANY VALUES).

If the Mass Update Attributes is not selected, then the Objects are successfully copied.



If the Mass Update Attributes is selected, then the form Add attributes to Copied objects opens after saving. There users can edit the attributes of the copied document and save them.

Add Attributes to Copied Objects

Object successfully copied

Save & Close

PROPERTIES

What are the Attributes?

Attribute	Value
[ar] Input	Name
[ar] ISO Norm-Referenz	SELECT ONE OR MANY VALUES
[ar] Output	Name
[ar] Physischer Standort	SELECT ONE OR MANY VALUES
[ar] ReferenceGuide Bezug	Name

After editing the attributes, users receive the message “All custom attributes were modified successfully”

# Documents Module – Track Changes Highlighted inside of File Attachments

---

## Functionality

EPC now automatically tracks and highlights all changes within all WORD documents uploaded into the system. This helps users to quickly visualize the changes completed between multiple users and versions and provides an additional level of audit transparency required for compliance.

## Customization

This new feature supports Excel, PowerPoint and Word.

Also, this feature tracks changes like:

- complex Formatting like bullets, tables, fonts
- text formatting like changes in font style, size, color, bullet added, etc.
- Documents (any) with complex rich text formatting

## How it works

1. To use this feature, users upload a new document (Doc 2) to replace old one (Doc 1). To compare the documents, the new and all version have to have the same document format.

For Example: below we can see the version 1 of the document. If users want to make changes, they have to download the document to edit it.



## Preview

Revised\_Error\_Messages4\_15\_04.doc ( DOC )

1 of 5

— + ...

✎

### INVOICE REJECTION NOTICES:

April 15, 2004

---

**test**

**FOOTING ERROR-**The invoice line(s) extended amount (quantity X unit price) + taxes and any other invoiced amounts do not match the total invoice amount. **Please review and resubmit the invoice.** If you have any additional questions, please email [disbursementsAP@bnsf.com](mailto:disbursementsAP@bnsf.com) (preferred) or call the AP Hotline at (800) 234-9972.

For example:  
The invoice reads: 78 items (SAP segment)

If you are entering amounts in any sections other than these three sections, the system is not including the amounts in the total (TDS Section). For example, if you are using a segment other than SAC for taxes, the system will not include the taxes in the total when calculating, resulting in a footing error. Please refer to the Railroad industry guidelines regarding what segments are included and required at the following address <http://12.15.24.55/infostnd/ediintro/transets.html>.

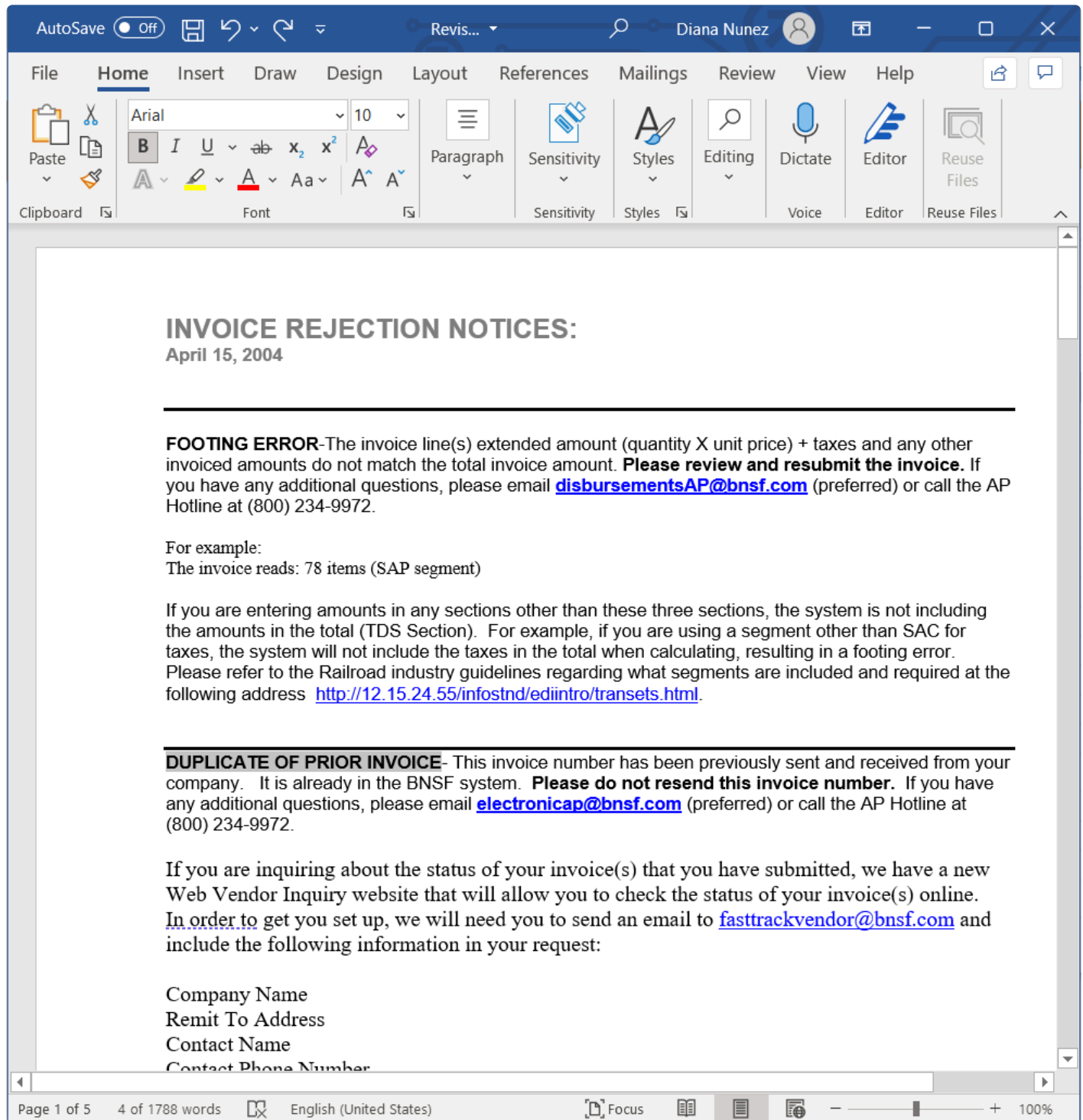
---

**DUPLICATE OF PRIOR INVOICE-** This invoice number has been previously sent and received from your company. It is already in the BNSF system. **Please do not resend this invoice number.** If you have any additional questions, please email [electronicap@bnsf.com](mailto:electronicap@bnsf.com) (preferred) or call the AP Hotline at (800) 234-9972.

If you are inquiring about the status of your invoice(s) that you have submitted, we have a new Web Vendor Inquiry website that will allow you to check the status of your invoice(s) online. In order to get you set up, we will need you to send an email to [fasttrackvendor@bnsf.com](mailto:fasttrackvendor@bnsf.com) and include the following information in your request:

Download Original File

Once users have downloaded the document, users can edit it and save the changes. Then upload the new version 2.



To upload the document, users go to the DETAILS page of the document and click on edit. The Edit document form opens, in the first section, users can choose or drag the new document.

### Edit Document

[GENERAL](#) [PROPERTIES](#)

[Save & Close](#)

---

#### What is this Document?

Name \* Rejection Note Template

Parent \* Import Folder [Edit Parent](#)

Unique Identifier 4829

Description

A template to be used as the Rejection Note used in the A/P Invoice.




Type

- [URL](#)
- [File Link](#)
- [Document Upload](#)
- [Wiki](#)
- [Generated from Template](#)
- [Template](#)

Choose or drag a file here

Once the document has been uploaded, the preview button is greyed out as the preview with the changes are being generated. users can refresh to see it.

LIST GRAPH DETAILS

   Edit ▼ Tools ▼ Publish

## Rejection Note Template [Draft]

Identifier: 4829

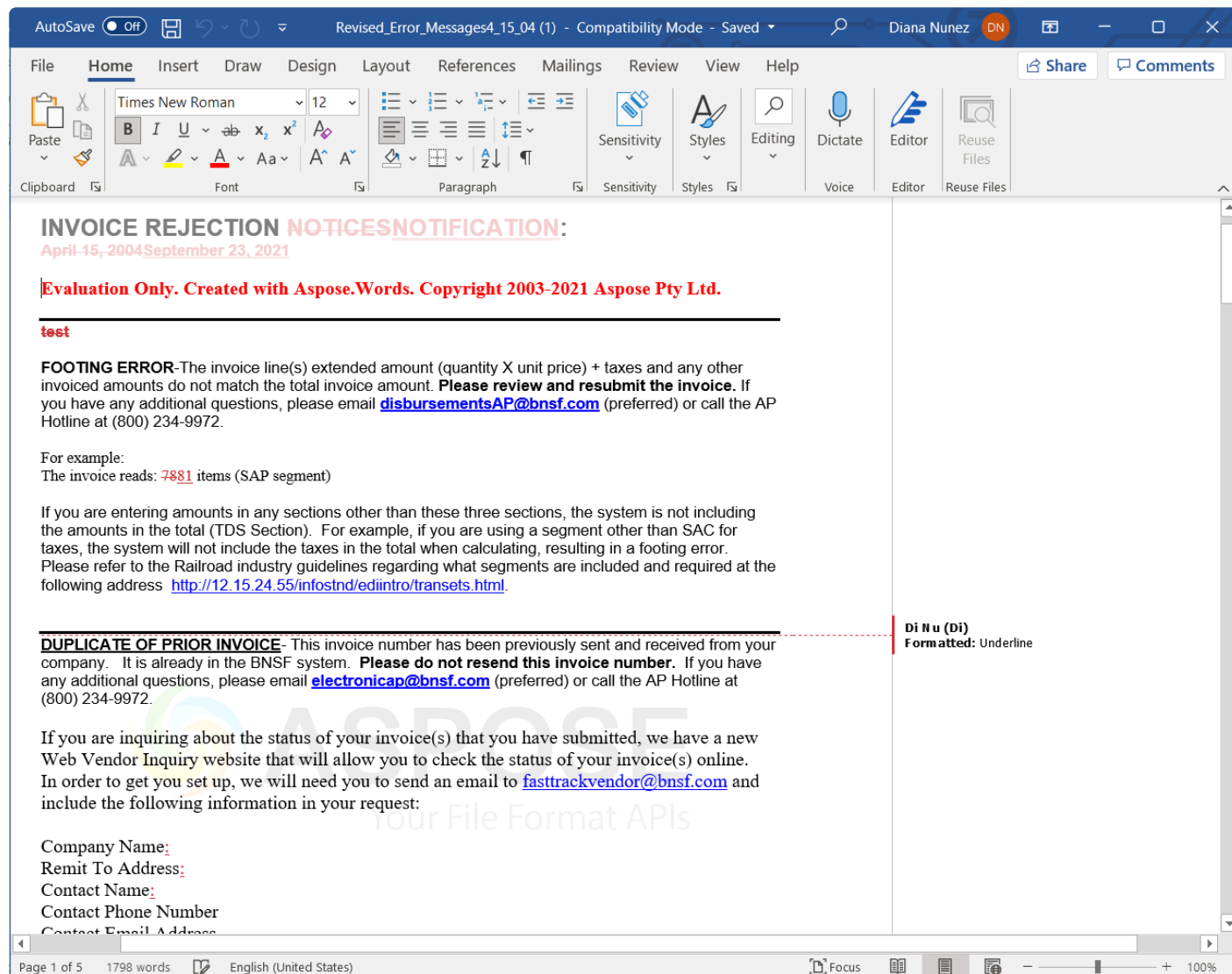
**747 Boeing**

▼ Description

A template to be used as the Rejection Note used in the A/P Invoice.

- File Details
- Responsibilities
- Custom Attributes
- Versioning
- Impact


To have a more detailed view of the changes, users can download the document and all the changes are displayed as we can see in the document below.







Once the document is ready for publication, user can publish and the doc compare stops showing the changes as that is declared as the official document.

Users can find all the previous edited version in Version History. Each document will have the track changes from the previous document. The document compare highlights text/sections in red/green based on specific changes

LIST GRAPH DETAILS



   Edit Tools Publish



**NDA ABC 2019-08-20.doc** [Draft]

> File Details

> Custom Attributes




> Versioning

> Current Version

Version Number: 0.0003

Last Modified: a few seconds ago

> Version History

	Version Number	Status	Published Comment	Author	Date
	0.0003	In Progress		Administrator (epcadmin)	September 23, 2021 4:21 PM
	0.0002	In Progress		Administrator (epcadmin)	September 23, 2021 4:19 PM
	0.0001	In Progress		Administrator (epcadmin)	September 23, 2021 4:17 PM

> Impact

# Middleware Bi-Directional Integration Sync Manager Module

---

## Functionality

Now in EPC, manage content centrally across applications. Whether its managed in the external system or within EPC, ensure your data is always correct and to-date. Remove the need to duplicate time / effort and risk of errors and inaccuracies when managing the same information in multiple systems for different purposes. When you create or update objects in one system, The information is automatically created/ updated in the other system. This new module is a licensed option.

# Essential Projects two way integration

---

## Functionality

Essential projects is a great tool for developing in-depth technical IT enterprise architecture asset and data blueprints, however, it lacks the process alignment, functionality for managing quality, compliance and improvement initiatives and isn't a tool made for the everyday employee to do their work (training, SOPs, WI, continuous improvement)

The IT department have documented and are responsible for managing certain informational entities like assets, and meta data within their EA solution. Business requires this information to align it with the business processes, documents, regulations, risks, controls, capabilities, etc., however, they do not want to duplicate the effort to manage it in another location and it isn't within their responsibility to manage these information entities either.

To offer a solution to this issue, EPC has created the Interfacing's Essential Project middleware bi-directional sync automatically updates the EPC whenever an IT asset is created or updated and inversely creates and updates the relationships of those assets within Essential to other business informational entities so that IT benefits also benefits from the insight into the touchpoints across the business without requiring any additional analysis work by their team.

EPC's new middleware allows for application management, data exchange and synchronization between both solutions:

- Synchronize Resources, Organization units, Assets and Systems
- Synchronize object attributes
- Add, manage and synchronize relationships between various objects (process, assets, resources, etc.)

## How it works

To use this feature, users create an objects in EPC and this is automatically created in EA Solutions.

For Example: if users create a process in EPC and creates the relationship with to the respective org unit, resource, asset or role responsible of it. Then this objects are created automatically in EAS solution.



PROCESS

NEW

ESSENTIAL TEST ENVIRONMENT

LIST GRAPH DETAILS

Change Management [Draft]

Description

Changes arise for a variety of reasons:

- Reactive, as a means of resolving errors and adapting to changing circumstances.

Changes should be managed to:

- Optimize Risk Exposure (supporting the Risk Profile required by the business)
- Minimize the severity of any impact and disruption
- Be successful at the first attempt.

Such an approach will deliver direct benefit to the Bottom Line for the business by delivering early realization of benefits (or removal of risk), with a saving of money and time.

To make an appropriate response to all requests for change entails a considered approach to assessment of risk and Business continuity, change impact, resource requirements, Change Authorization and especially to the realizable business benefit. This considered approach is essential to maintain the re...

Business continuity

Business continuity is an organization's ability to maintain essential functions during and after a disaster has occurred

Show More

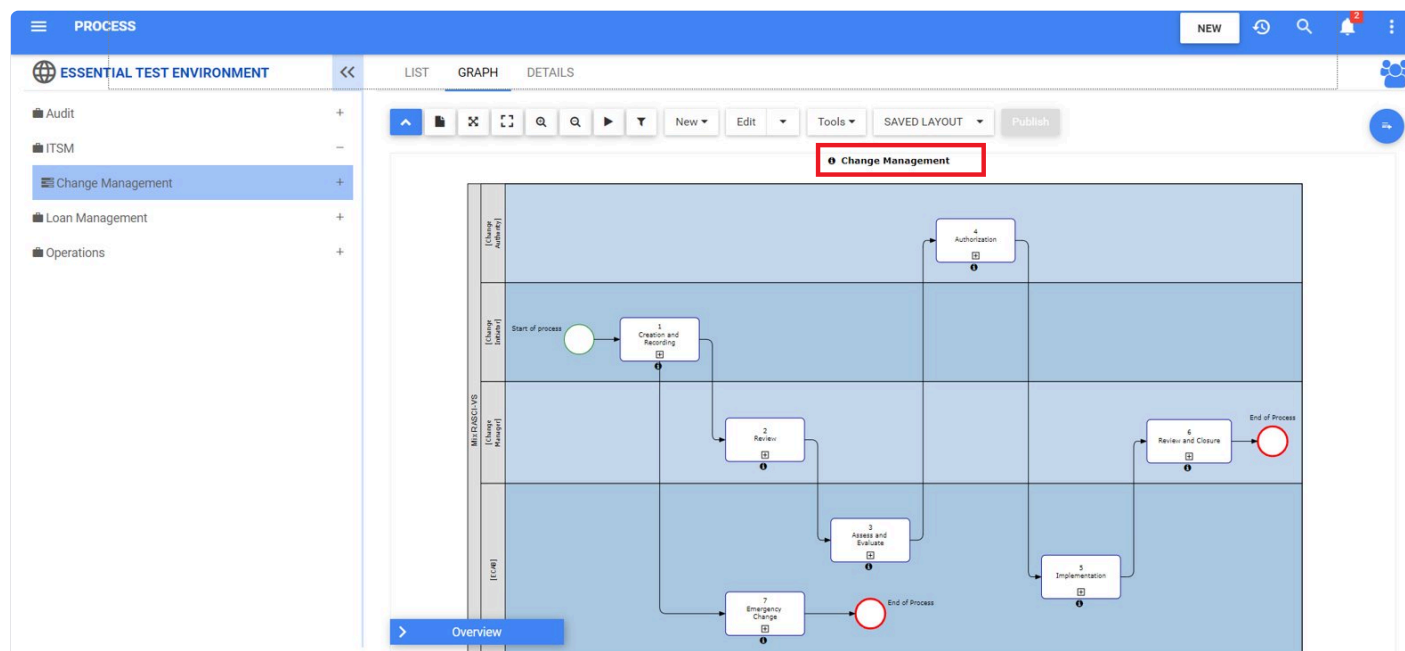
Goal

Responsibilities

Roles

- CAB [C]
- Change Authority [C]
- Change Initiator [C]
- Change Manager [C]
- Change Stakeholder [C]
- Process Owner [A]

Risks & Controls



The screenshot displays the EPC interface with the 'Business Process' section selected. The 'Class Tree' on the left shows the hierarchy: EA Relationship > EA System > EA Class > Business Layer > Business Logical > Business Role > Business Process Type > **Business Process (19)** > **Change Management**. The 'Instance Browser' on the right lists various audit-related processes, with 'Change Management' highlighted. The main panel shows the details for 'Change Management', including its description: 'Changes arise for a variety of reasons: Reactive, as a means of resolving errors and adapting to changing circumstances. Changes should be managed to: Optimize Risk Exposure (supporting the Risk Profile required by the business) Minimize the severity of any impact and disruption Be successful at the first attempt. Such an approach will deliver direct benefit to the Bottom Line for the business by delivering early realization of...'. The 'Process ID' is empty, and the 'Realises Business Capabilities' section lists 'New Technology Deployment'. The 'Information Used' and 'Performed By Organisations' sections are also empty.

The screenshot displays the EPC interface with the 'Business Process' section selected. The 'Class Tree' on the left shows the hierarchy: EA Relationship > EA System > EA Class > Business Layer > Business Logical > Business Role > Business Process Type > **Business Process (19)** > **Change Management**. The 'Instance Browser' on the right lists various audit-related processes, with 'Change Management' highlighted. The main panel shows the details for 'Change Management', including its description: 'Changes arise for a variety of reasons: Reactive, as a means of resolving errors and adapting to changing circumstances. Changes should be managed to: Optimize Risk Exposure (supporting the Risk Profile required by the business) Minimize the severity of any impact and disruption Be successful at the first attempt. Such an approach will deliver direct benefit to the Bottom Line for the business by delivering early realization of...'. The 'Process ID' is empty, and the 'Realises Business Capabilities' section lists 'New Technology Deployment'. The 'Information Used' and 'Performed By Organisations' sections are also empty.

When users create objects in EAS, then these objects are also created in EPC

# Atlassian Jira 2 way integration

---

## Functionality

Now in EPC, the new Atlassian Jira is a bridge between BAs, Dev, QA and UAT

In EPC, we have identified a problem in the collaboration between business and development can be challenging, the EPC data sync manager breaks down that communication gap. Development and QA (jira users) lack visibility into the end-to-end process (epic) and understanding which requirements are associated with which task (story) depending on the path (scenario). As requirements / stories evolve during the development process business does have the transparency into the delivered product vs. the requested original requirement.

We have created a solution to this issue, as business analysts map out the workflows, rules, roles and requirements, the EPC automatically creates and syncs the EPICs and related Stories within Jira. The story details include the full rich text formatting (tables, bullets, fonts) and associated images (screenshots & diagrams). As changes are made within either application, the other application is automatically updated with the most recent updates ensuring consistency on both ends. A URL and Jira Issue # is also automatically added so users can open the associated map or jira issue directly from the other application with ease.

- The creation of a process or tasks in EPC creates a corresponding epic or stories in Jira
- The creation of a story in Jira creates a corresponding document of type URL linked to Jira in EPC
- An update of an epic or story in Jira updates corresponding EPC objects
- An update of process or task in EPC updates corresponding epic or story in Jira

## How it works

To use this feature, if users want to have a process in Jira, they will need to go and create a process by adding the name and description.

## Add New Process

Editing Language  
ENGLISH

GENERAL   PROPERTIES   FLOW OBJECTS

Create & Close   Create & Map

What is this Process?

Parent \*   **Unclassified Process set**   Select a Parent

Name \*   **quality audit**

Sequence #   What is the Sequence Number?

Unique Identifier   What is the unique identifier?

Then add the Jira tag in the categories.

## Add New Process

Editing Language  
ENGLISH

GENERAL   **PROPERTIES**   FLOW OBJECTS

Create & Close   Create & Map

What are the BPMN properties? +

What type of Process is this? +

**Which Categories are applicable?** -

Select a Category   Type Category Name

Core

I3 - Solution Validated (PN Included)

**Jira**

Key Customer

LTT - Game & Game Consoles

How strict is this process? +

What are the Requirements to implement? +

What are the UAT to implement? +

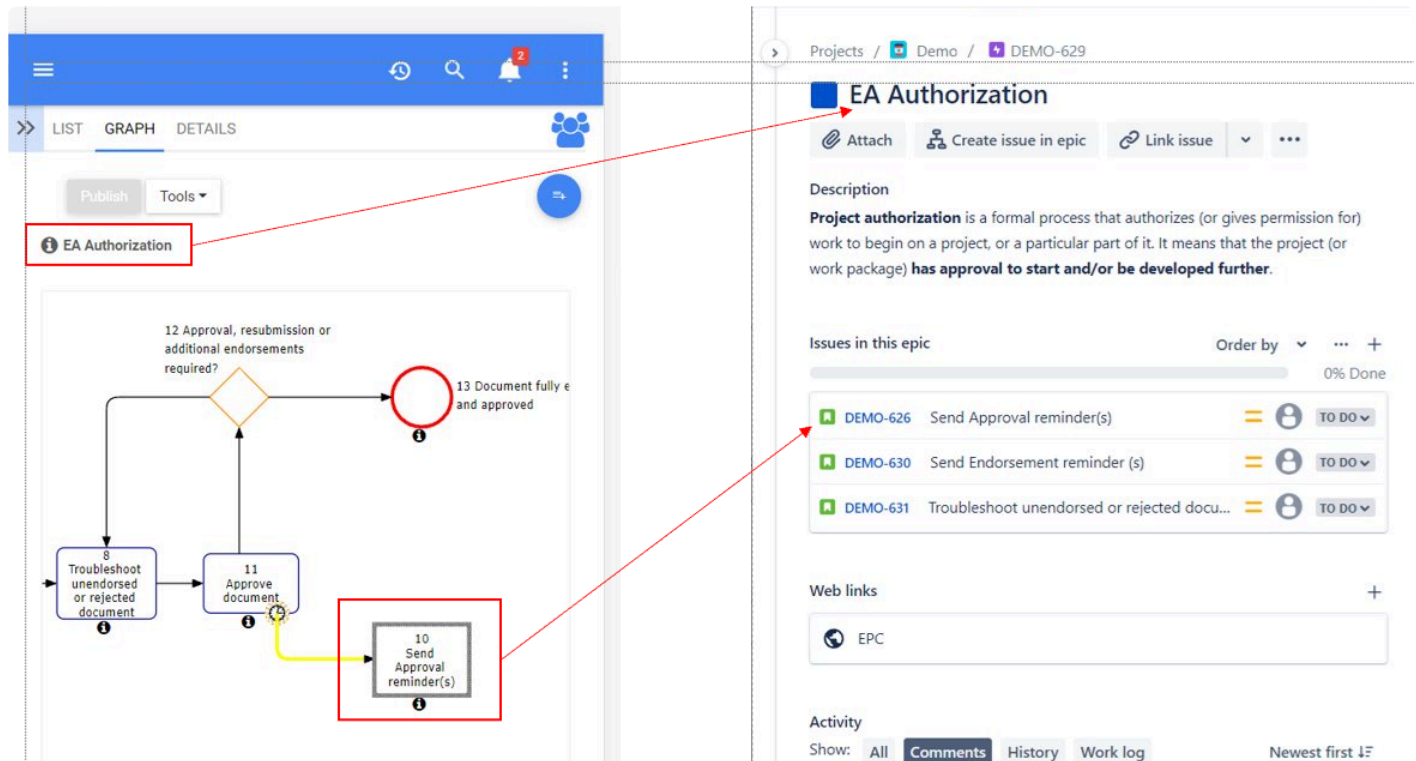
What are the Attributes? +

Cancel   Create & Close   Create & Map

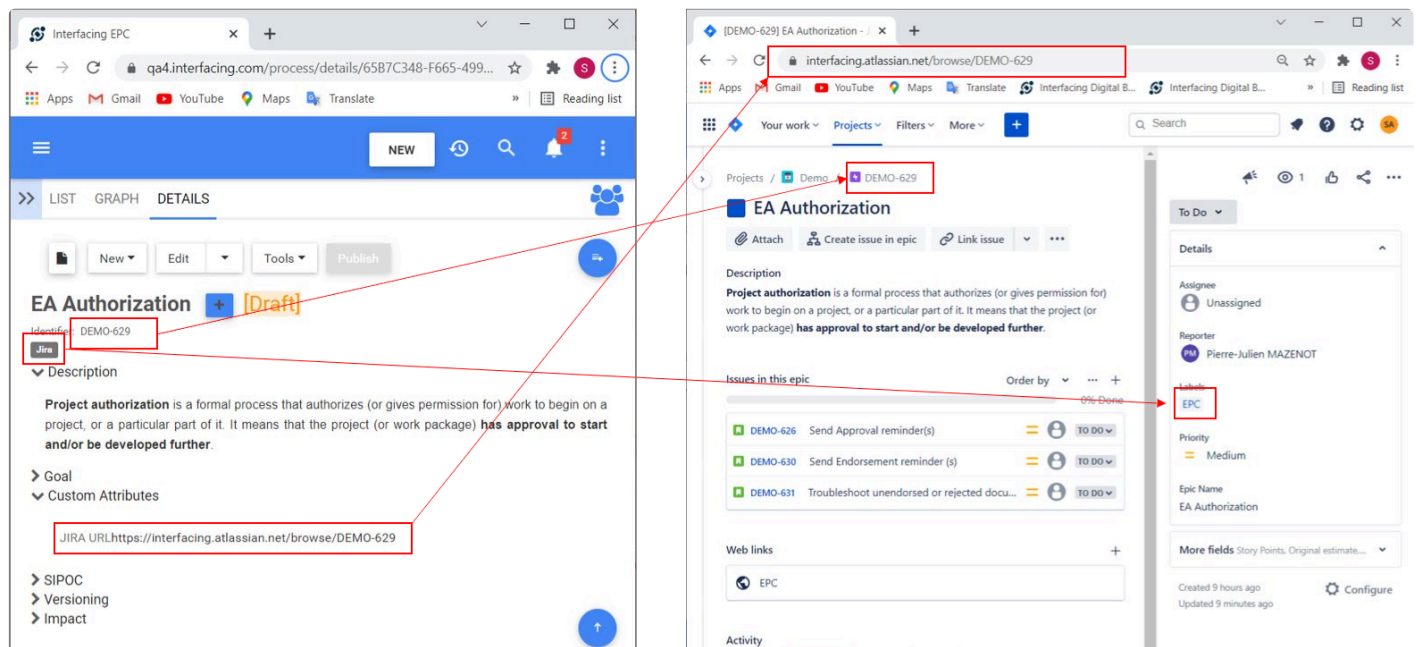
On the save, this will automatically create and Epic in Jira. Each process associated to Jira will create an

epic and each task will be created as a User story if associated by the tag.

Everytime, users create a process this is automatically creates an epic story in Jira and each shape that is part of the process is a story. Then if users add any shape to the process, the new task in Jira appears as new User story under the Process Epic.



In Jira and in EPC, users have a link to access directly the object in EPC or the EPIC in Jira.



Depending on what version of Jira you are using some of the formatting or images in the rich text can be not supported “

If we update the task in Jira. Adding some requirements for example and save. And we go back to EPC, we will find the updated information in the task.

When creating a Story in Jira and when tagging the Item by EPC. Users will find an object created in the document folder. The object will have the Jira link associated as an URL

This is how both systems are able to communicate and ensure the synchronization between business and the development

# GDPR Compliance – Option To Hide Personal Identifiable Information

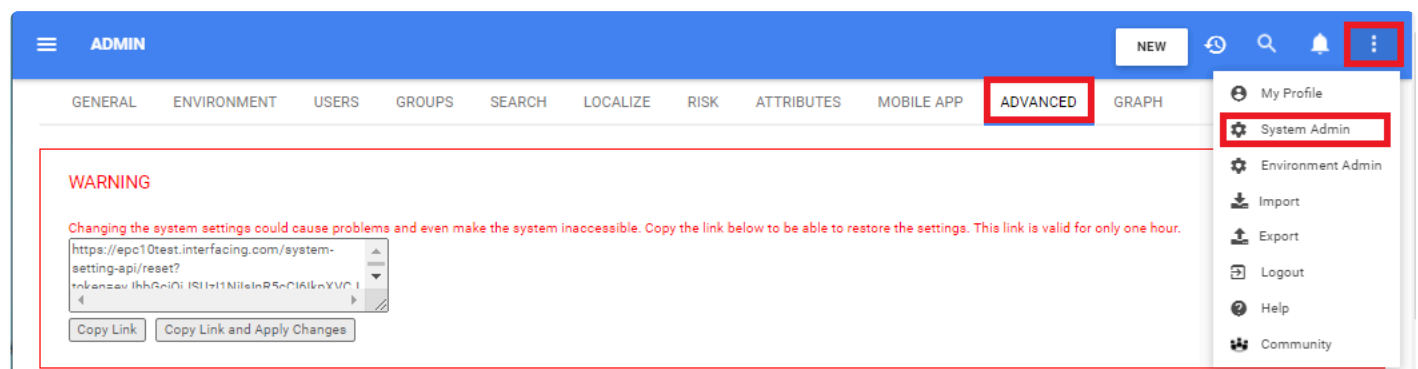
## Functionality

Now, in EPC, System administrators have the option to configure their EPC system to hide all personally identifiable user information, allowing them to comply with very strict GDPR policies.

## How it works

To use this feature, system administrators need to enable it. By default, this feature is disabled.

To enable it, system administrators can click on the three dots in the top right corner of EPC, select System Admin and go to the Advance tab.



There, system administrators can enable or disable the option to hide all personally identifiable user information within the web application.



Once this option is enabled, users cannot see any PII. The only information displayed is the first and last letter of the name a, this is applicable for Users and Resources. The information would look as shown below:

- First Name – Last Name : John Smith -> j\*\*n s\*\*\*h IF
- Email : j\*\*\*\*\*h@interfacing.com

- Username : j\*\*\*\*\*h

- Phone number : 5\*\*\*\*\*1

- Middle name : j\*\*\*\*\*h

- IP address : 1\*\*.\*.\*.\*1

The avatar image will not be available

COLLABORATION									
LIST									
Type	System ID	Subject	Object Name	Last Modified by	Replies	Priority	Object Type		
						(3) CRITICAL			
Improvement Request	IR-2021-43	Collab test	3 Financial Institutions	J*****h	1	Critical	Process		
Discussion	D-2021-8	The mobile test	2 Personal Banking Business	J*****h		Normal	Process		
Improvement Request	IR-2021-41	dede	5.1 Interface with customers	J*****h	1	Major	Process		
Incident	I-2021-8	did my trainin	4.2.4 Appraise and develop suppliers	J*****h	1	Critical	Process		
Improvement Request	IR-2021-40	Collaboration	TC 19 Process Abortion using terminate ever	J*****h		Normal	Process		
Improvement Request	IR-2021-6	Screenshots need updating	8.6.1.3.2 Process Invoice	L*****g	2	Major	Process		
Discussion	D-2021-5	Test	3 Financial Institutions	J*****h		Major	Process		
Improvement Request	IR-2021-8	Screenshots need updating	8.6.1.3.2 Process Invoice	L*****g	3	Critical	Process		
Improvement Request	IR-2021-38	gfhg	1 Corporate Banking Business	L*****g		Major	Process		
Improvement Request	IR-2021-7	Screenshots need updating	8.6.1.3.2 Process Invoice	L*****g		Critical	Process		
Improvement Request	IR-2021-1	Screenshot should be updated to reflect new	8.6.1.3.2 Process Invoice	L*****g	1	Major	Process		
Improvement Request	IR-2021-2	Screenshots need updating	8.6.1.3.2.5 Enter Invoice into System	L*****g	2	Normal	Process		
Incident	I-2021-1	Missing approver	12.5.2 Review	L*****g		Critical	Process		
Improvement Request	IR-2021-9	Addition of Metrics	12.5.6 Review and Closure	L*****g		Normal	Process		
Discussion	D-2021-1	Adding a emergency approval by ECAB would	12.5.7 Emergency Change	L*****g		Normal	Process		

Only system administrators can see the PII of all users. This option doesn't cover Reports, Audit Trail (Export), SOP, Approval Documents, Digital Signature on Documents and Emails.



# Import – Visio Shape Match Wizard

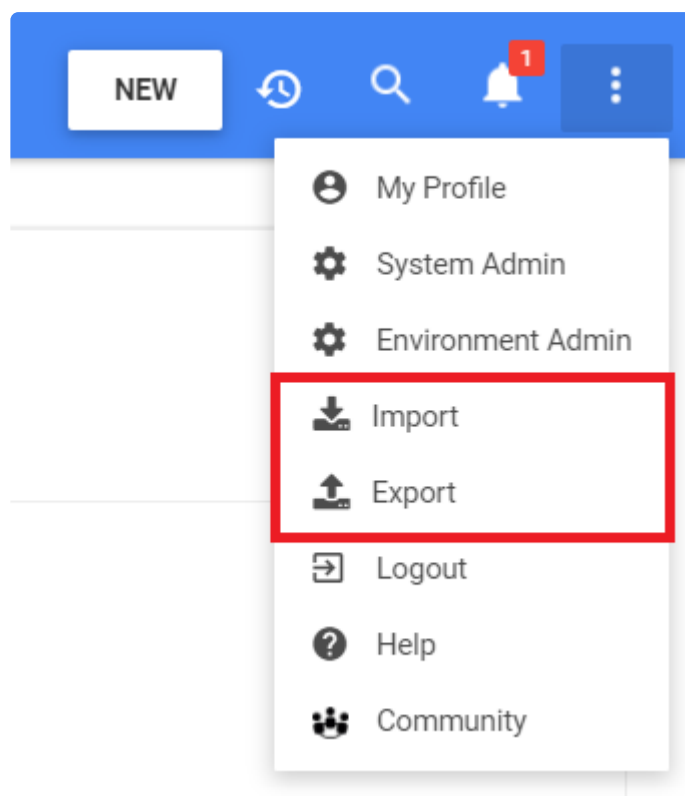
## Functionality

In EPC 13.0, users have the shapes used within their Visio files automatically match and can map them with BPMN 2.0 flow objects (auto-map still supported). Once a mapping template is defined, it can be reused across many Visio files to save time/effort of migrating processes.

Moreover, the exact layout of your Visio Swimlane and Flowchart shape locations will be preserved after import and an option to ignore any non-necessary shapes was also added

## How it works

To use this feature, users can go to the three-dots situated in to right corner of EPC and click on import or export.



A form will open to choose the format of the document being uploaded.

## Import

The following types are compatible for import into EPC:

- ☐ EPC (.epc)
- ☒ Visio (.vsdx)
- ☐ BPMN (.bpmn)
- ☐ Master Data (.csv)
- ☐ Excel (.xlsx)

CancelFinish

Once the Visio Document is chosen, users can select where the process will be located, in which organization unit the roles will be created and match the shapes of Visio. Click on Finish when done.

## Import

The following types are compatible for import into EPC:

☐ EPC (.epc)


☒ Visio (.vsdx)

☐ BPMN (.bpmn)


☐ Master Data (.csv)

☐ Excel (.xlsx)

Select a file to begin the import [Browse...](#)

Select the destination Process Set or Process  

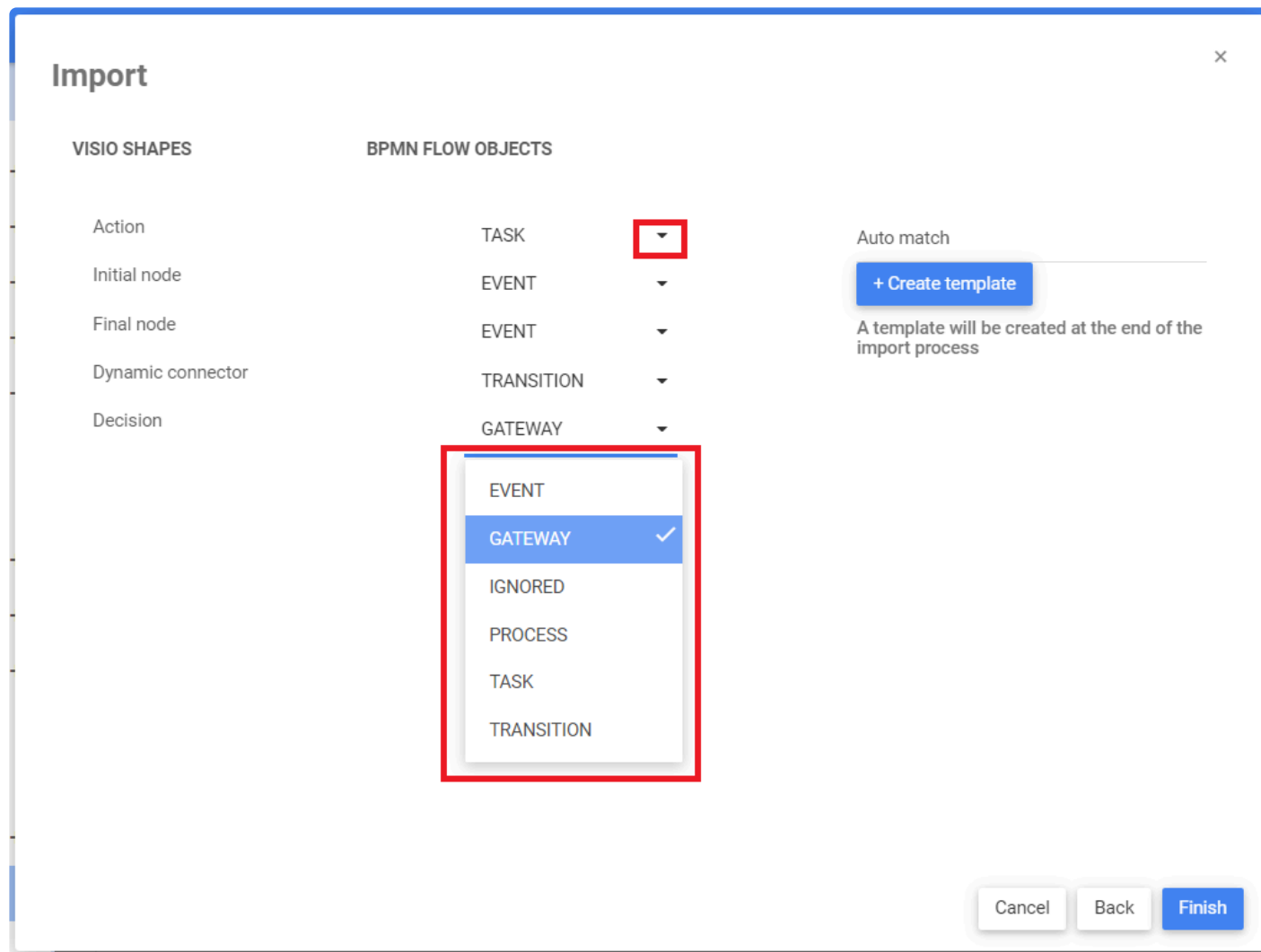
Selected Process Set or Process

Select the destination Organization Unit  

Selected Organization Unit :

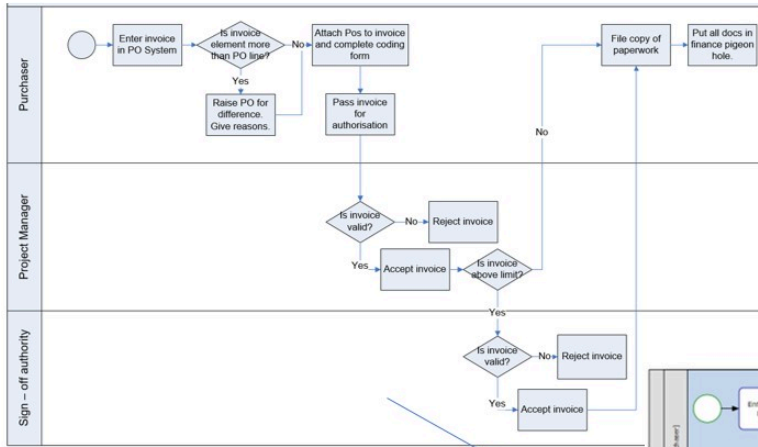
[Cancel](#) [Next](#)

After clicking on the **Next button**, a window opens allowing the user to select which BPMN shapes are equivalent to the ones in Visio.

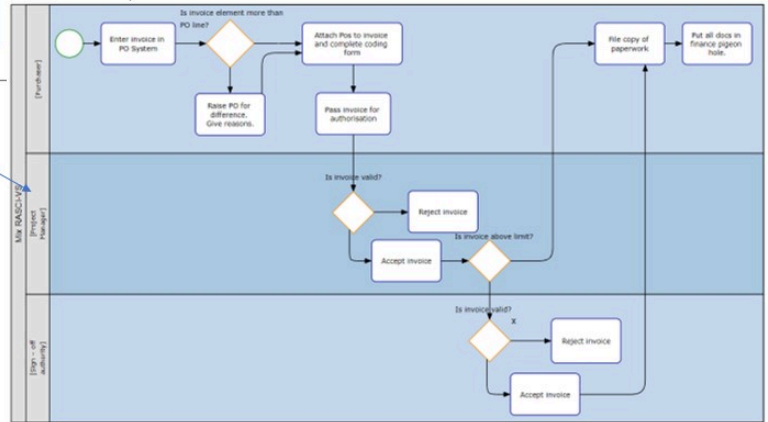


in the same window, users have the option to create a template, if a template name is added after selecting the matching shapes, the next time the user imports a process from a Visio file, it will remember which Visio shape is the equivalent Visio shape in the BPMN flow object that the user matched.

Then the process is imported and users can find the imported process in the selected parent on the tree.



Visio IMPORT Layout Maintained!



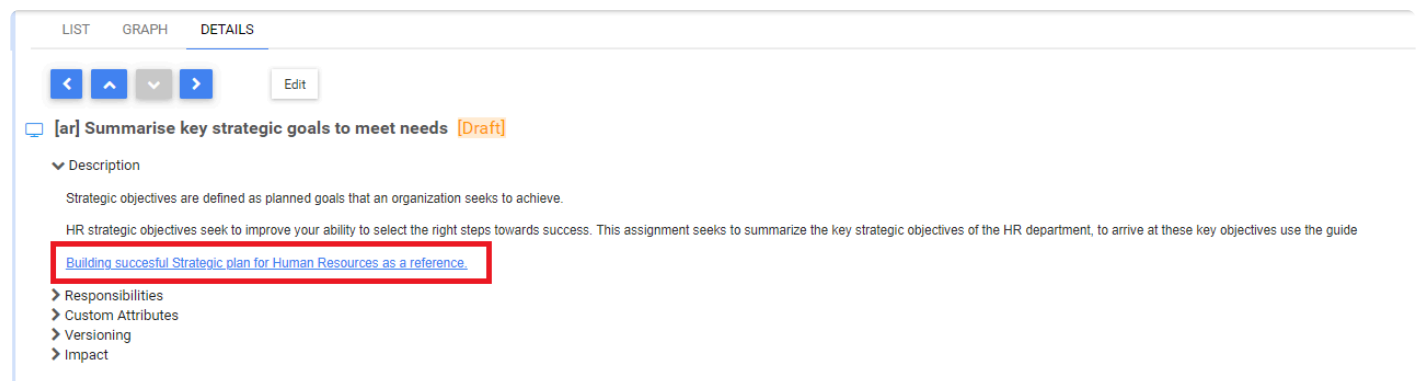
# Document Preview added to Text Hover

## Functionality

In EPC, end-users are now provided with faster access to view documents that are referenced within any rich text field using our “link to object” feature. File download and preview options are now available within the hover pop-up so users can view not only the document details but the file contents as well directly without having to navigate away to another page.

## How it works

To use this feature, users have to go over the word with a link to a document object. These words are in blue color inside of texts in EPC.



While users hover over the words in blue, they can see the pop-up window with two new buttons Download and Preview next to Show more.

LIST GRAPH DETAILS

Edit

**[ar] Summarise key strategic goals to meet needs** [Draft]

▼ Description

Strategic objectives are defined as planned goals that an organization seeks to achieve.

HR strategic objectives seek to improve your ability to select the right steps towards success. This assignment seeks to summarize the key strategic objectives of the HR department, to arrive at these key objectives use the guide

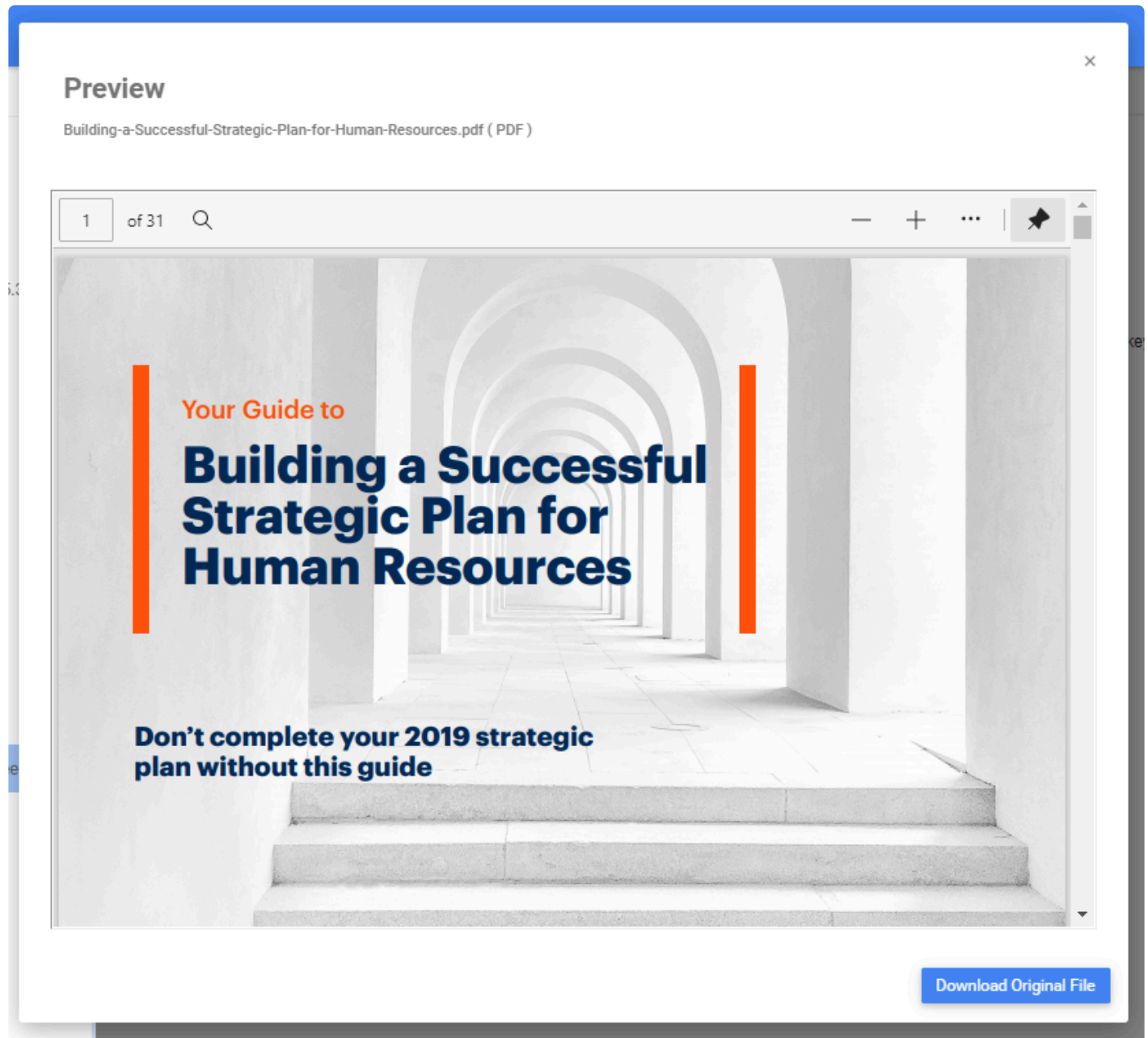
[Building succesful Strategic plan for Human Resources as a reference.](#)

> **Building succesful Strategic plan for Human Reso...**

> The strategic planning process is a periodic resetting of mid- to long-term strategic direction and priorities. It focuses on key issues and the specific initiatives needed to attain long-term strategic goals. However, the process must be rooted in the company's mission and vision

[Show More](#)

If users click on the preview, then they can see the preview version of the document and the download button



To exit the window user can by clicking on (x) or just outside the window



if user click on the download button, then the document would automatically downloaded

Furthermore, if the link to object is linked to a URL, users are able to preview or be redirected to the URL.



LIST

GRAPH

DETAILS

<

>

↶

↷

Edit

Write/Modify Job Description [Draft]

Identifier: 80AD5B19-134F-48AA-8FD2-EE5000856FC8

▼ Description

Crafting a compelling job description is essential to help out team to attract the most qualified candidates for the position..

The key to writing effective job descriptions is to find the perfect balance between providing enough detail so candidates understand the role and your company while keeping your description concise.

Use the [Job description tips and Sample](#) to create a compelling job listing.

➤ Respons

➤ Custom

➤ Versioni

➤ Impact

Job description tips and Sample

A job description summarises the essential responsibilities, activities, qualifications and skills for a role. Also known as a JD, this document describes the type of work performed.

A job description should include important company details — company mission, culture and any benefits it provides to employees. It may also specify to whom the position reports and who

Show More

# FEATURE ENHANCEMENTS OVERVIEW

---

# Documents Module – Generate Book vs Generate Book from Template

---

## Functionality

Now in EPC, users can easily create a document with different templates on document creation or from GRAPH and DETAILS page for the other modules. This allows users to extract the information of an object based on a selected template.

## Customization



Generate Book



Generate Book from Template










## How it Works



To use the Generate Book feature, users can click on the object book icon in GRAPH and DETAILS page in all modules\*, there users have the option to select the template and then a Document **generates from the selected template** with the information of the object .

×

Template Selection

	Name	Category	Subtype	Status
<input checked="" type="checkbox"/>	 [Default Template] System Req (A4 - Landscape)			Published
<input type="checkbox"/>	 [Default Template] Process Map Only (A4 - Landscape)			Published
<input type="checkbox"/>	 [Default Template] Process Audit (A4 - Landscape)			Published
<input type="checkbox"/>	 [Default Template] Approval			Published
<input type="checkbox"/>	 Default template (A4 - Landscape)			Published
<input type="checkbox"/>	 [Default Template] Summary (A4 - Landscape)			Published
<input type="checkbox"/>	 [Default Template] Snapshot (A4 - Landscape)			Published
<input type="checkbox"/>	 [Default Template] UAT (A4 - Landscape)			Published
<input type="checkbox"/>	 [Default Template] Analysis (A4 - Landscape)			Published

⏪

⏩

1

⏪

⏩

Map Orientation

Left-to-right

▼

Map Layout

Saved map layout

▼

Map Page Break Options

Use canvas grid page breaks

▼

☒ Include all children

Cancel

Done











To use the Generate Book from Template feature, from the form add New Document, users select the type of document as Generate from template and choose the template to be use for the document.

Note: In the form, Select SOP Process is no longer required for all documents.

×


Add &amp; Close

URL	File Link	Document Upload	Wiki	Generated from Template	Template
-----	-----------	-----------------	------	-------------------------	----------

	Name	Category	Subtype	Status
<input checked="" type="checkbox"/>	 [Default Template] Approval Control			Published
<input type="checkbox"/>	 [Default Template] Approval Organization			Published
<input type="checkbox"/>	 [Default Template] Approval Capability			Published
<input type="checkbox"/>	 [Default Template] System Req (A4 - Landscape)			Published
<input type="checkbox"/>	 [Default Template] Approval Rule			Published
<input type="checkbox"/>	 [Default Template] Process Map Only (A4 - Landscape)			Published
<input type="checkbox"/>	 [Default Template] Approval Performance			Published
<input type="checkbox"/>	 [Default Template] Approval Organization			Published
<input type="checkbox"/>	 [Default Template] Approval Master Data			Published
<input type="checkbox"/>	 [Default Template] Process Audit (A4 - Landscape)			Published

《 ‹ 1 2 ›

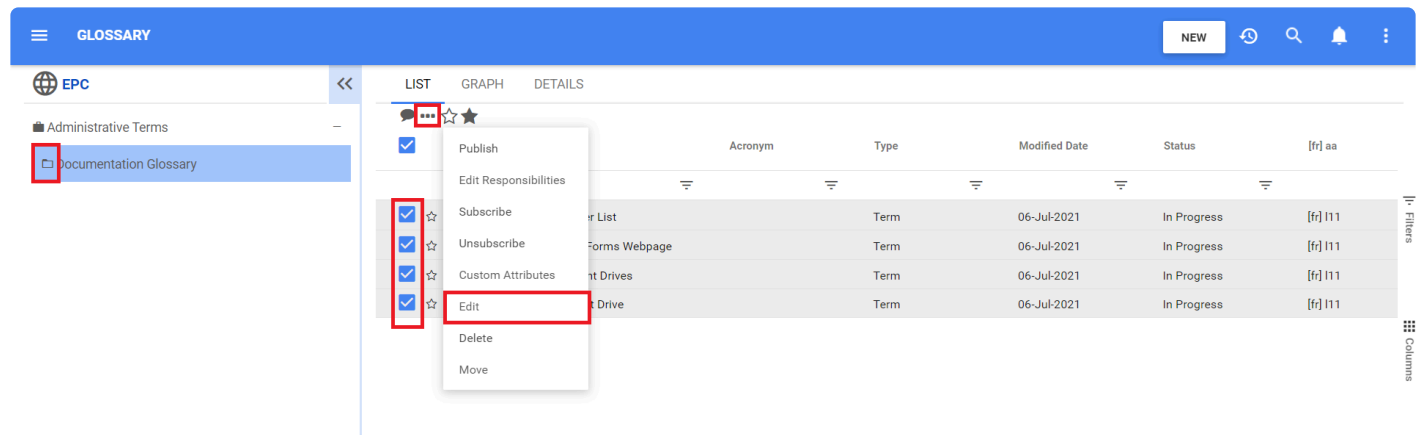
Page 207 of 358

Once the document has been created, then users can click in Document module, go to DETAILS page of a document object. There users can find icon  , when clicking on it, users will download the document with the chosen template on creation of the document if selected.

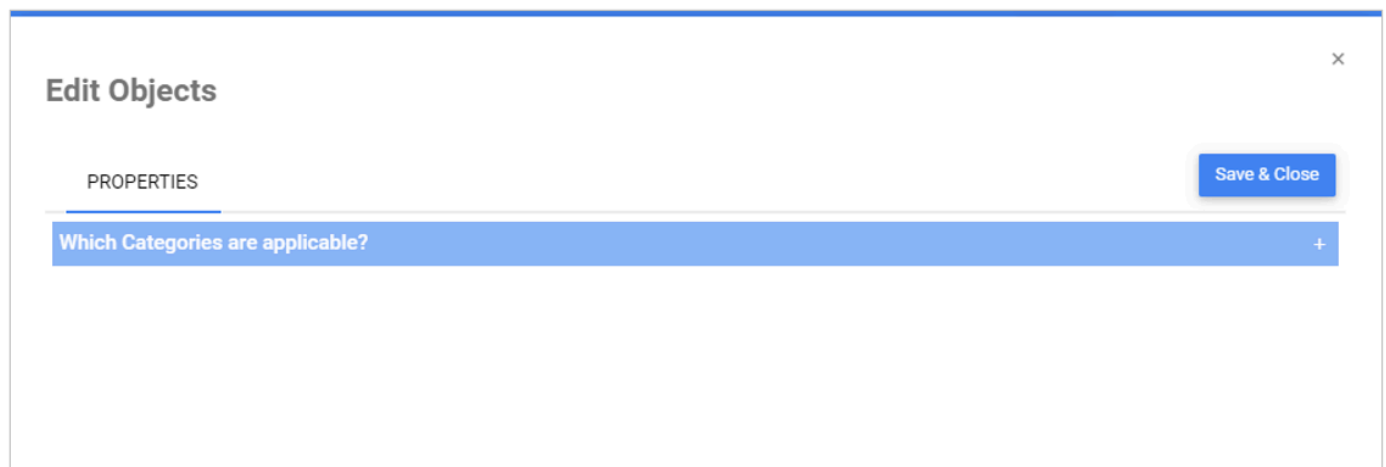
\*Glossary module does not include this feature

# Glossary Module – GENERAL tab has been disabled when mass editing terms

Before when users would navigate to a glossary folder in the glossary module, select various terms in LIST page and try to mass edit user will see GENERAL tab empty.



To avoid confusion, users can mass edit it only in the PROPERTIES tab.



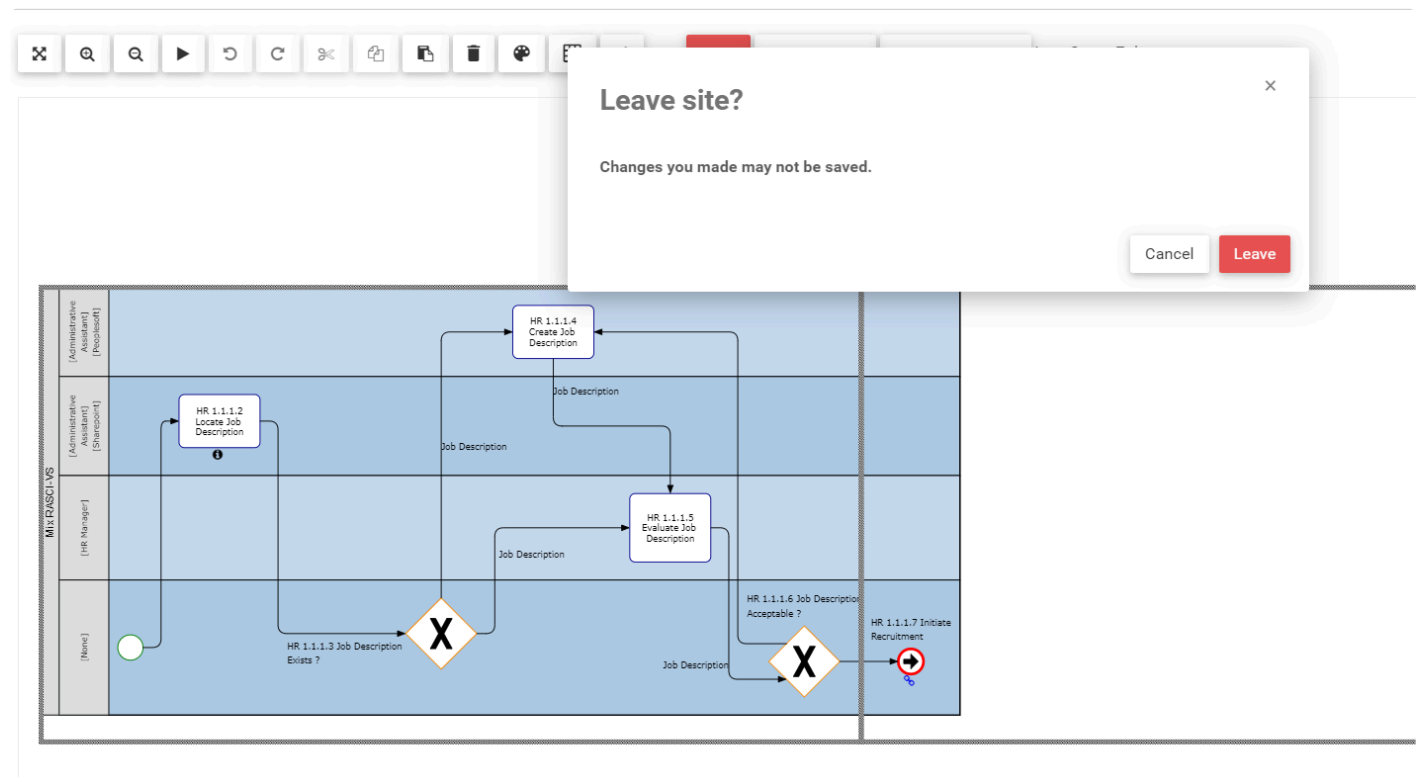
# Alert Notification when clicking the Back button in Browser

## Functionality

An alert notification will now appear when a user is in edit mode in a graph and clicks on the “back” button of the browser or “back/delete” on keyboard. The user will be alerted to avoid losing information by accident.

## How it works?

When user is on edit mode in graph and clicks on the “back” button of the browser or “back/delete” on keyboard, now a warning message appears to allow to confirm to continue or cancel the action.





# Removed Publish Queue

---

When users with write permission publish EPC objects, these objects are now published instantly.

Previously they were placed in a “publish queue” and dealt with one at a time, which in some cases caused delays in making the latest data available to end users.

Therefore, the publishing queue and the “force publish” option on the system administration page have been removed and made obsolete with this new enhancement.

# Mass Update Objects – Limit increased

Mass Update changes in earlier versions were limited to 50 objects. We have now increased the ability to mass update to 500 objects.

LIST   GRAPH   DETAILS

...

☆

☆

	Name	Categories	Description	My RASCI-VS
<input type="checkbox"/>				
<input type="checkbox"/>	[fr] Imported Control Set			
<input checked="" type="checkbox"/>	[fr] Imported Control Set			
<input type="checkbox"/>	[fr] Imported Control Set			
<input checked="" type="checkbox"/>	3.0 Market and Sell Products and Services			
<input checked="" type="checkbox"/>	4.0 Deliver Products and Services			
<input checked="" type="checkbox"/>	Controls for Covid-19 (Mitigation)			

TO DO

LIST

Over Due  
0

Due Today  
0

Due Soon  
0

Confirmation 0

Approval 2

Endorsement 0

IR to Review 0

IR to Publish 0






























Update to Review 0

...

	Sequence #	Name	Parent Name	Action Type	Type	Pending Since
<input checked="" type="checkbox"/>		[fr] Test 1	[fr] Test 1	Approval	Document	26-Jul-2021
<input checked="" type="checkbox"/>		[fr] 00-Process2	[fr] test 1	Approval	Process	26-Jul-2021

# Users can select Objects through several pages for Mass Updating

When users select objects on one page and then move to the next one, the objects will stay selected on the previous page. This allows users to select objects within several pages to make use of the mass update enhancements.

LIST					GRAPH		DETAILS	
   								
<input type="checkbox"/>	Name		Description		Type		Performance	
<input type="checkbox"/>			[ar] Analysing the data		Process			
<input type="checkbox"/>			[ar] Define what you can measure		Process			
<input type="checkbox"/>			[ar] Define what you should measure		Process			
<input checked="" type="checkbox"/>			[ar] Gathering the data		Process			
<input checked="" type="checkbox"/>			[ar] Implementing corrective action		Process			
<input type="checkbox"/>			[ar] Presenting and using the information		Process			
<input type="checkbox"/>			[ar] Processing the data		Process			
<input type="checkbox"/>			[ar] START OF PROCESS		Start			
<input type="checkbox"/>			[fr] task		Task			
<input type="checkbox"/>			new process check reference		Process			

Filters

Columns

Page 1 of More

>

Show: 10 - 25 - 50

## **When Creating a New Document – ‘Select SOP Process’ not Required**

Before, when creating a document Generated from template, it was required to Select SOP Process. Now it isn't required.

New Document

Editing LanguageENGLISH

GENERALPROPERTIESCUSTOM SECTIONS

Add & Close

What is this Document?

Name \*What is the name?

Parent \*

Select a Parent

Unique IdentifierWhat is the unique identifier?

Description

Source | [Icons] | [Tools]

[Formatting Options]

TypeURLFile LinkDocument UploadWikiGenerated from TemplateTemplate

Select SOP Process


Select a Template \*


Name	Category	Subtype	Status
<input checked="" type="checkbox"/> [Default Template] Analysis (A4 - Landscape)			Published


# **Copy/Paste in Tree Keeps Source Reference**


Before, when users copied reference parent with reference children, only the parent was copied as a reference, the children would be copied as sub-processes based on the reference, there was no tie-back to a source process


Now, when references are copied and have a tie-back to the source process, then the reference and copy of reference have the same source. The original and the copied reference reflect the same original source.


 **PROCESS**


 <<


 Accounting —


 Book keeping —


 Collecting and Analyzing Documentation —


 Documentation Management —


 Audit —


 Compliance —


 Transactions


 Trial Balance


 Invoice process —


 Documentation Management —


 Audit —


 Compliance —


 Invoice approval


 Invoice creation


 Patent Management —

 Patent Registration —

 Documentation Management —

 Audit —

 Compliance —

 Patent Buying +

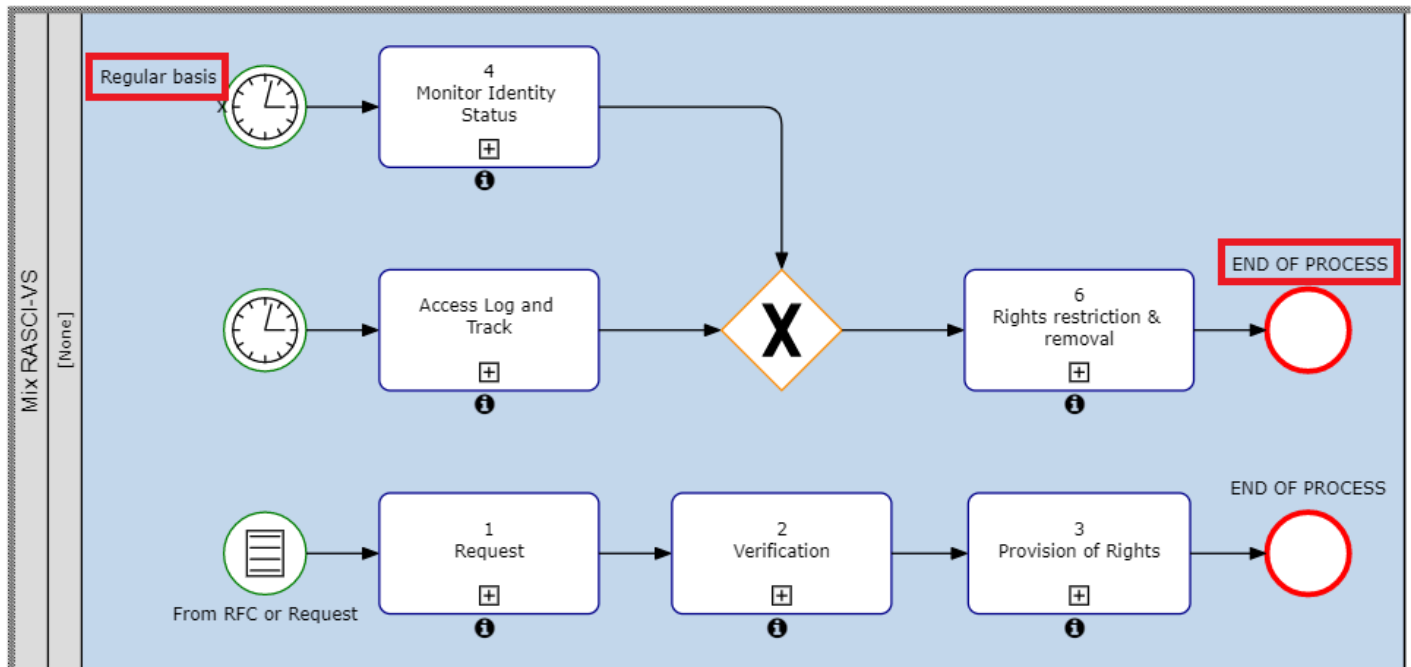
© 2020 Interfacing Technologies Corporation

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# When Editing a Graph – Click to Move Event Annotations now Available

Before, users would need to hold shift to move note on events of a graph.

Now, to improve the Mapping usability, users can move annotations on events by simply clicking on them.



# When Adding a New Process – Improved User-Friendly Layout

The layout of the Add New Process form has been improved. Now the layout is more user-friendly.

- User can see the Add+ button at the end of the form to choose the flow object required.
- User can see clearly which flow object to remove.
- Assign the person responsible of the action.
- Describe step-by-step how to do the chosen action.

The screenshot displays the 'Add New Process' form with the 'FLOW OBJECTS' tab selected. The form is titled 'Add New Process' and includes a language dropdown set to 'ENGLISH'. The 'FLOW OBJECTS' tab is active, showing a list of flow objects. The first object is 'START'. To the right of the 'START' object is a 'Remove START' button. Below the 'START' object is a text area for 'Describe step-by-step how to do the START'. At the bottom of the form is an 'Add +' button next to the 'START' object. The form also includes a search bar for 'WHO is RESPONSIBLE?' and a 'Create & Close' button.



# Capability Module – Improved Edit and Add New Capability Forms

---

Previously, the Capability and Edit form would use different wording for question in its tabs.

GENERAL	PROPERTIES	ANALYSIS
What is this Capability?		
What are the Responsibilities?		
Select Process Relationship		
Select Document Relationship		
Select Performance Relationship		
Select Organizational Relationship		
Select Asset Relationship		
Select Role Relationship		
Select Resource Relationship		
Select Business Rule Relationship		
Select Risk Relationship		
Select Control Relationship		

Now this has been standardized, and the question are the same as in other modules.

Edit Capability

Editing LanguageENGLISH

×

GENERALPROPERTIESANALYSIS

Save & Close

What is this Capability?	+
What are the Responsibilities?	+
Which Processes are used?	+
Which Documents are used?	+
How is Performance measured?	+
Which Organizational Units are applicable?	+
Which Assets are applicable?	+
Which Roles are applicable?	+
Which Resources are applicable?	+
Which Business Rules are applicable?	+
Which Risks are applicable?	+
Which Controls are applicable?	+

Edit Capability

Editing LanguageENGLISH

×

GENERALPROPERTIESANALYSIS

Save & Close

What type of Capability is this?	+
Which Categories are applicable?	+
What are the Attributes?	+

# Capability Module – Capability edit form now has the option to choose the organization unit on the left side

Previously, when users opened the tree selector to choose an organization relationship, users could select the org unit on the right side of the Capability. Now, users can also select an org unit from the left side in the tree.

**Edit Capability**

GENERAL PROPERTIES ANALYTICS

What is this Capability?

What are the Responsibilities?

Select Process Relationship

Select Document Relationship

Select Performance Relationship

Select Organizational Relationship

Select an Organization Unit

No Organization Unit Assigned

Select Asset Relationship

Select Role Relationship

Select Resource Relationship

Select Business Rule Relationship

Select Risk Relationship

Select Control Relationship

**FORMATION**

- Management
- Auditors
- Executive Office**
- Finance
- Human Resources
- Information Technology
- Logistics Service Providers
- Marketing & Sales
- Operations
- Quality Management
- IT Systems
- IT Systems
- System Monitoring Team

**ORG UNIT**

Name

- Accounting
- Accounts Payables
- Advertising
- Contract Management
- Finance
- Human Resources
- Information Technology
- Information, Security & Compliance
- Internal Audit
- Logistics Service Providers
- Market Research
- Marketing & Sales
- Operations
- Production
- Quality Management
- Sales

Select an object and click "Add"

Close Add Add & Close

Save & Close

# **Customize Home Tabs by User or Group (New Admin Security Option)**

---

Previously, environment admin and system admin had access to all tabs automatically. Now, environment admin and system admin have access only to the tabs according to their security level.

For create/update/delete, there is no change. Only environment admin and system admin can perform those operations.

# Importing to Excel – PROCESS\_PARENT column now optional

---

Before when users imported processes in excel, the column PROCESS\_PARENT was mandatory. Users would need to have to create a new empty column to be able to import.

Now, users can import without adding that column, Column PROCESS\_PARENT is now optional.

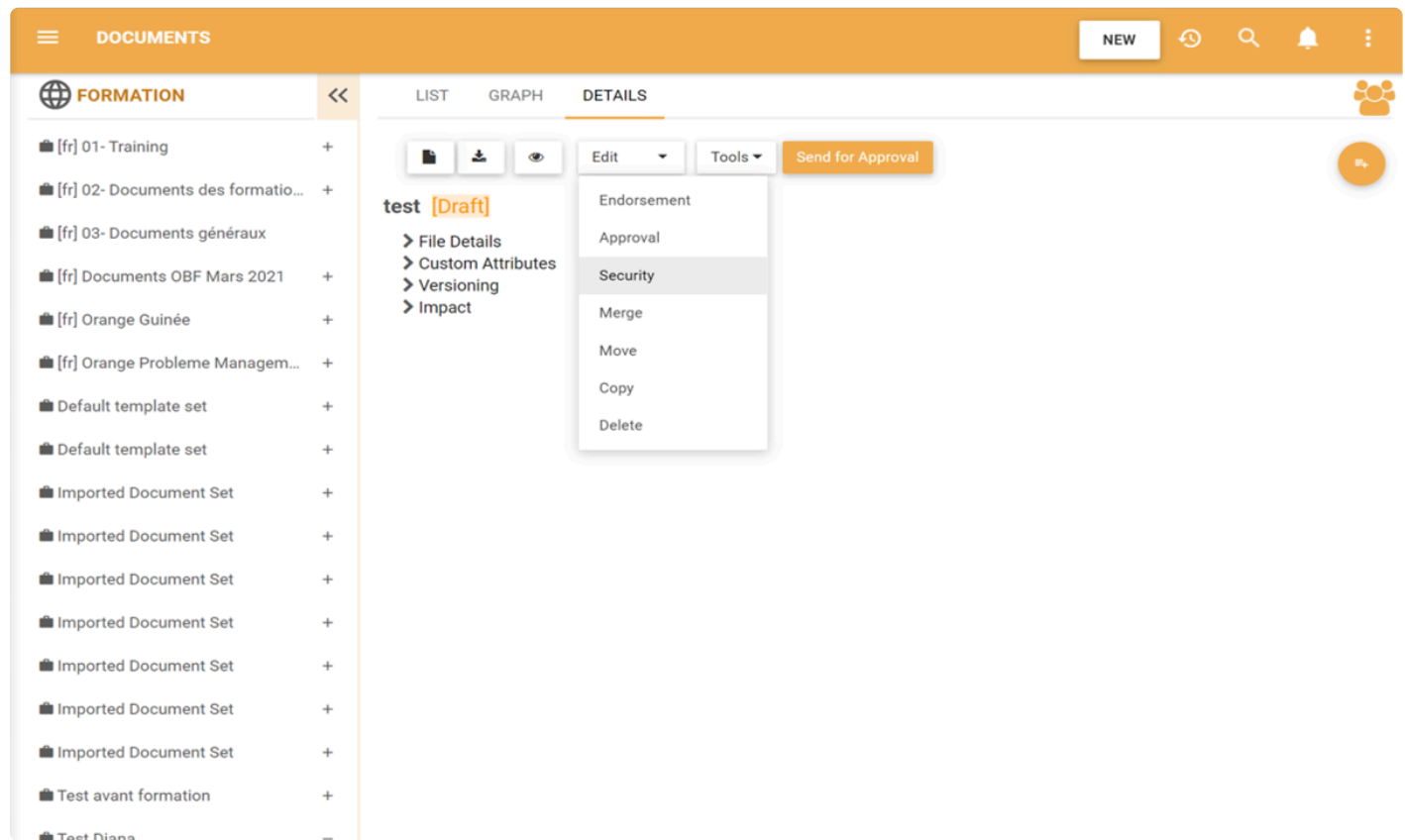
# FIXED ISSUES

---

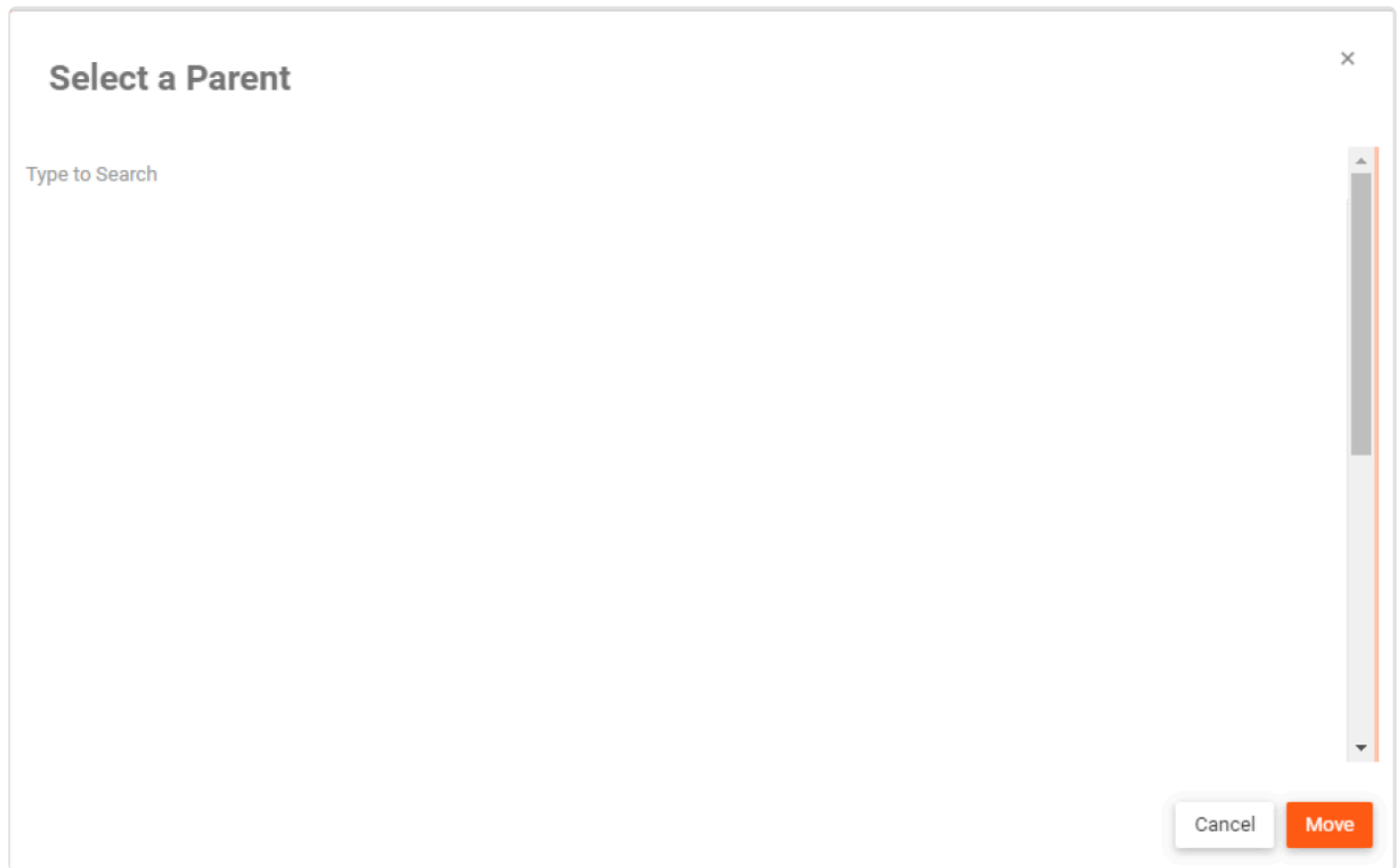
# Issue list 13.0

## Security

In the previous version, some users that were selected as modeler, Web Portal User and had “Full Control Allow” to a document set would encountered problems viewing Folders or Sets when Copying or Moving.

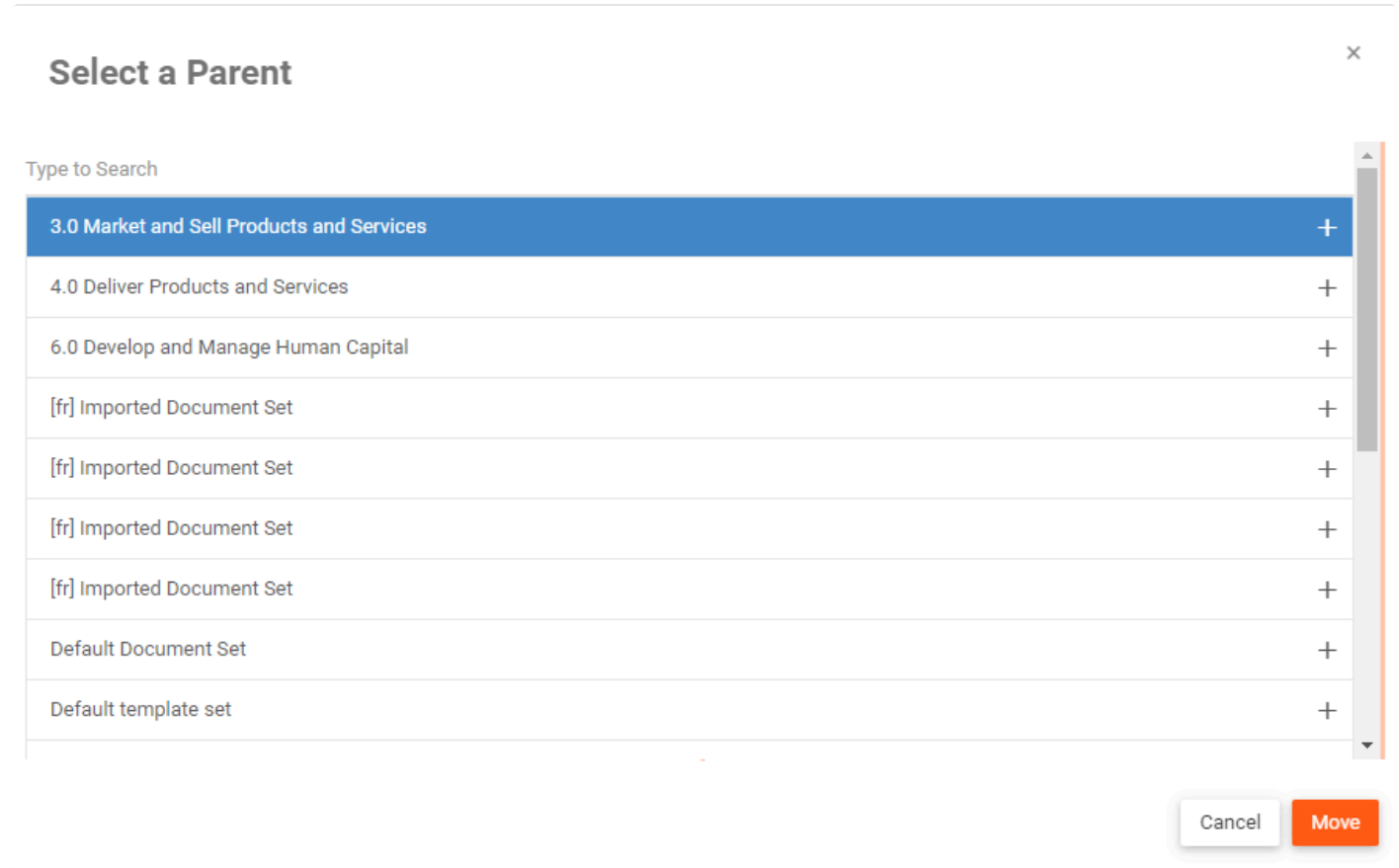


The user would try to move or copy documents inside of the folder, but when they click on the buttons they would find the tree empty as shown in the image below.



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





## Publishing

Some users were having problems when trying to republish saved Procedures. Some objects would not be displayed. This issues is fix in EPC 13.0.

## Email Notification

In the previous version, some users with the interface language set to German did not receive the e-mail notification. In EPC 13.0, these user receive the email notification.

## EPC User Login



Some user were having issues accessing EPC, when a new user was created, user could not log in to the system if wasn't part of a EPC group. this would happen even if user had access to an environment and modeler permissions

×

## Edit Groups of: Di

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

Select a Group

Name ▲	Admin	Modeler Access	WebApp Access	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Authenticated Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Everyone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

⏪ ⏩ 1 ⏭

Show: **10** - 25 - 50

Close

In EPC 13.0, users are able to login to EPC even without being member of a group.

## Governance

Users couldn't add numbers that contained zero on execution field of Analysis in Governance.

GOVERNANCE											
OVERVIEW MATURITY ANALYSIS											
★	Seq. #	Parent	Seq. #	Process or Flow Object	Type	Path(s)	Value Type	Waste Type	# Operators	# Executions	Actual Cost
📅	02.02.05	Audit Execution		Close Audit	Task	Critical	VE	Inventory	0	20	0.0
📅	02.01.03.2	Production Preparation	02.01.03.2.4	Prepare tools	Task	None	VA	None	0	1	0.0
📅	1.3.3	Manage Proposal		1.3.3.9 Hold proposal post morte...	Task	None	VA	None	0	1	0.0
📅	1.3.3.3	Perform the Internal Inspection	1.3.3.2.7	Inspection of Sanitation Procedu...	Process	None	VA	None	0	100	0.0
📅	1.3.4	Conduct a Closing Meeting	1.3.4.7	Provide report with corrective act...	Task	None	VA	None	0	1	0.0
📅	t 4t4t 4t43t 43t4t 34t		t43t34t 43t34t43t 43t43t		Process	None	VA	None	0	1	0.0
📅	02.02.05	Audit Execution		Approve / Update Test Schedule	Task	None	VA	None	0	67	0.0
📅	1	Test - BPMN 2.0 Training		Begin Training	Task	None	VA	None	0	1000000	0.0
📅	1.3.3.2.4	Assess Manufacturing Equipment	1.3.3.2.4.8	End	End	None	VA	None	0	1	0.0
📅	02.03	Receive Raw Material	02.03.4	Unload Material	Task	Critical	VA	None	0	1	0.0
📅	8.6.1.3.2.5	Enter Invoice Into System	8.6.1.3.2.5.6	Park Invoice - or use Park Tab in "...	Task	High Risk	VE	None	0	1	1.0
📅		Evaluation	5	Evaluation Report	Process	None	VA	None	0	23	0.0
📅	02.01.3	Production	02.01.03.10	Attached Pieces (clamps, glue, s...	Task	Critical,High Risk	VE	Defects	30	34	2500000.0
📅	1	Define		Service Improvement opportuniti...	Task	None	VE	None	0	1	0.0
📅		Awareness to Loyalty Customer Journey		event	End	None	VA	None	0	1	0.0
📅	02.01.2	Production Planning	02.03	Receive Raw Material	Process	Critical,High Risk	VE	None	5	1	10000000.0
📅		VDepaz Test		Auto Insurance	Process	None	VA	None	0	1	0.0

## Graph and details page

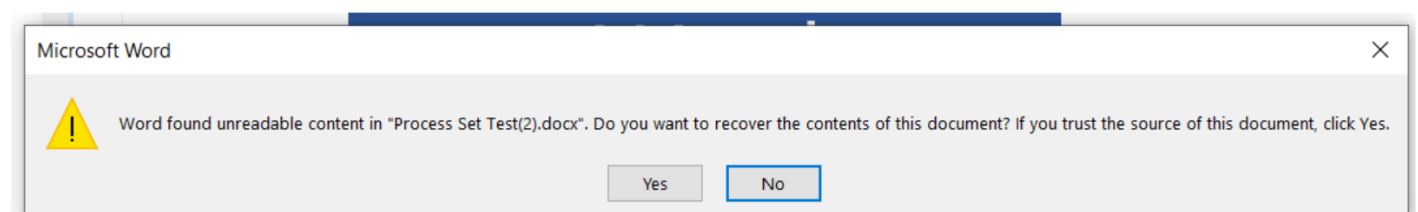
Before, there was an issue when displayed published objects on details or graph pages on newly created environments. This is no longer a problem.

## Approval with e-signature

Before, e-signature wouldn't work when the name of an object sent for approval ended in dot pdf (.pdf). This issue was valid for all objects. When users uploaded e.g. a document with .pdf extension and didn't give a name to the document, then this document would automatically take the name of the pdf document (.pdf extension). This created an error and user couldn't not approve using e-signature. This is no longer a problem.

## Object Book

Some users were having an error message 'Word Found Unreadable Content', when trying to generate an SOP with a customized template. However, if users choose to ignore it by clicking on YES, the SOP would be opened as usual.



These would happen when users downloaded a template and made a little change and uploaded again. These is no longer an issue, now SOP generates without an error message.

## **System Admin**

### **Attributes**

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

×

## Edit Attribute

Attribute Name \*

Description

Applicable to Object(s) :

Attribute Type

Is Mandatory ☐

Drop-down Values

☐

☐

☐

+

Check the checkbox of one value to make it the default.

Cancel

Save

This issue has been resolved

## Attributes

[+ Add New Attribute](#)

Name	Asset	Attribute	Control	Document	Entity	Flow object	KCI	KPI	KRI	Objective	Org Unit	Process	Resource	Risk	Role	Rule	Term	Capability
Average Video 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 checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BCP Objectives	<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 type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BCP Security Alerts	<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 type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business Impact	<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 type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business Priority	<input checked="" type="checkbox"/>	<input checked="" 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 checked="" 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"/>
Business Priority	<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 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"/>
bz1	<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 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"/>
Capability Advantage Creation	<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 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"/>
Capability Gap - Value to Effort	<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 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"/>
Capability Maturity	<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 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"/>

## Theme Settings

In our previous version, some users were able to save a empty theme in System Admin which produced an error.

Theme Settings

#4285f4

Change Theme

Reset

Font Color

#171414

Change Color

Reset

Add/Edit Signature

Now, when users are in My Profile and try to update theme, users cannot update leaving theme as empty. This has been fixed for EPC 13.0.

PROFILE

Language

Interface Language

English

Content Language

English

Theme Settings

Change Theme

Reset

Font Color

#171414

Change Color

Reset

Wrong or missing value entered for the Theme Color or Text color. The color value must be in hexadecimal format. ex. #3070c0 The previous value will be kept.

## EPC UDA

Before the Text value for UDA of type Simple Text was limited to 256 characters. The limit has been extended to 1024 characters.

×

### Add New Attribute

Attribute Name \*

Attribute Name

Description

Description

Applicable to Object(s) :

NOTHING SELECTED

▼

Attribute Type

SIMPLE TEXT

▼

Default Value

Default Value

Is Mandatory

☐













Cancel

Add

## Import

### Import Excel

Some users experienced issues when importing an Excel document to create a process, users would start the process of importation by selecting publish and overwrite and when the process was completed multiple unexpected objects of association (Ex: Roles, assets, document) were created.

LIST   GRAPH   DETAILS							
			Name	Parent	Type	Status	
		☆	Gestionnaire des sucreries	Imported Org Unit	Role	Published	27-May-2021
		☆	Gestionnaire des sucreries	Imported Org Unit	Role	Published	27-May-2021
		☆	Gestionnaire des sucreries	Imported Org Unit	Role	Published	27-May-2021
		☆	Gestionnaire des sucreries	Imported Org Unit	Role	Published	27-May-2021
		☆	Gestionnaire des sucreries	Imported Org Unit	Role	Published	27-May-2021





Filters

Columns

< > Page 1 of 1 > >|

Show: 10 - 25 - 50

This issue has been fixed. Now, when users import their processes the right number of associations are created.

LIST   GRAPH   DETAILS							
			Name	Parent	Type	Status	
		☆	Imported Org Unit	Imported Org Unit Set	Org Unit	Published	27-May-2021

Filters

Columns

< > Page 1 of 1 > >|

Show: 10 - 25 - 50



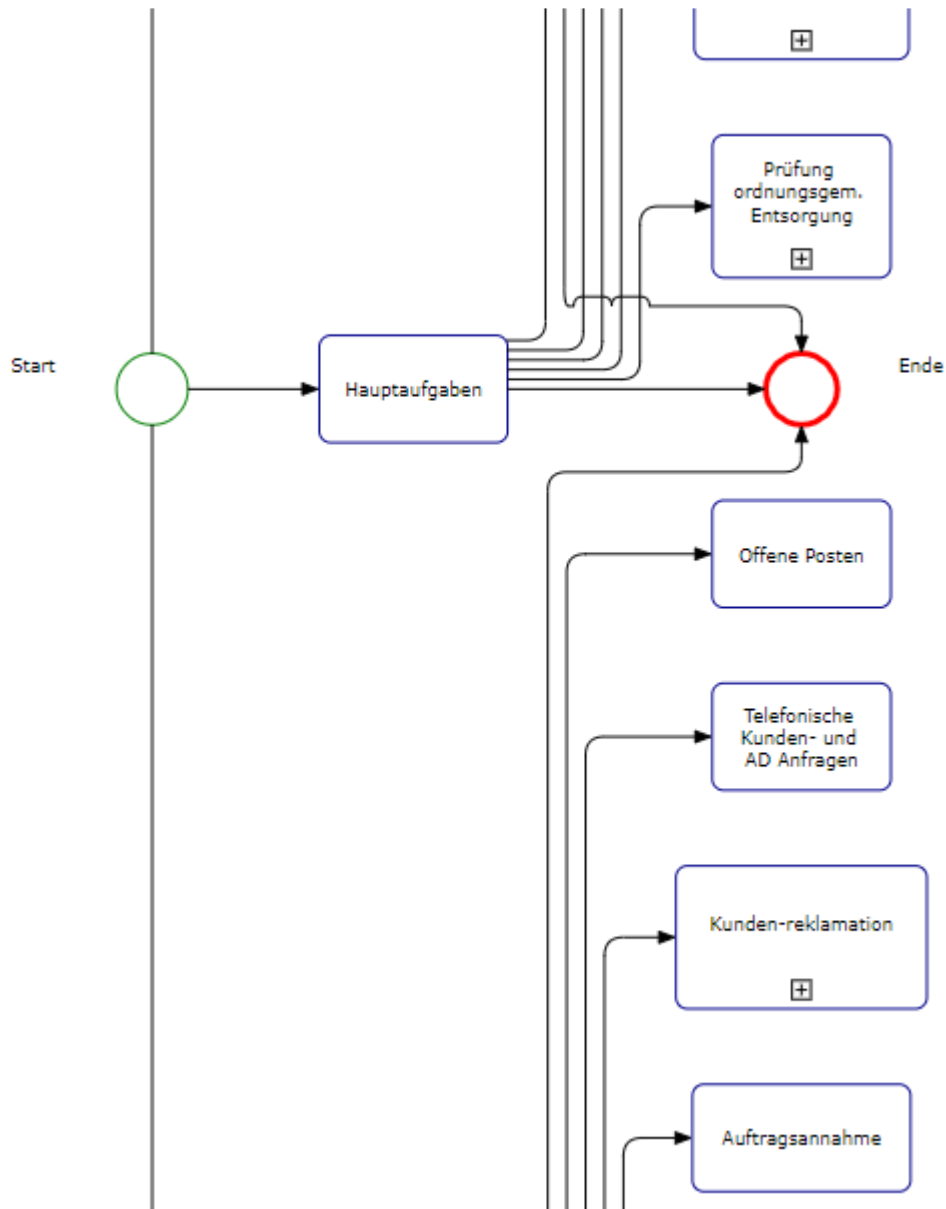
Also, when importing the Role and Processes, these were not relating to a RASCI Letter. So users observed that if the RASCI\_ROLE were not put in brackets, the responsibility letters would be included in the name. This bug has been resolved.

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

## Visio Import

Before in EPC, when importing a Visio file, there was no transitions between the shapes when using a German visio file.

Now, we can see the transition of the imported vision document.



## EPC Import

In the previous version, some users experienced EPC import failure when importing a file with maturity data created in v12.3 or a previous versions.

## Import

✕

The following types are compatible for import into EPC:

☒ **EPC (.epc)**

☐ Visio (.vsdx)

☐ BPMN (.bpmn)

☐ Master Data (.csv)

☐ Excel (.xlsx)

Select a file to begin the import

**Browse...**

Selected file: OLD\_MATURITY.epc 35.43 KB

Do you want to overwrite and replace duplicates?

☐ **Overwrite**

Note: if overwrite is selected, the ID attribute of objects must be aligned once per selected module.


Do you want to publish all objects upon import?

☐ **Publish**

Cancel

**Finish**

Now, users can EPC import without issues.

 **NOTIFICATION**

Object Type : NOTHING SELECTED ▾ Notification Type : NOTHING SELECTED ▾ Date Range :

Import Success  
The file OLD\_MATURITY.epc was imported successfully  
a minute ago Import Completed Successfully

Import initiated. You will receive a notification when the import is complete. ✕

## NEW button

### Add New Process

In the previous version, When some user were creating a new process from button NEW without being in process module, after clicking on Create and map button, the process map would open to edit.

Add New Process

Editing LanguageENGLISH

GENERALPROPERTIESFLOW OBJECTS

Create & CloseCreate & Map

What is this Process?

-

Parent \*

Unclassified Process set

Select a Parent

Name \*

Process 4

Sequence #

What is the Sequence Number?

Unique Identifier

What is the unique identifier?

Description

Source | [Icons]

[Rich Text Editor]

Now, when adding a new process and user is in a non-process module, the user stays in the same module.

DOCUMENTS

TUTORIAL

Default template set

+

LIST

GRAPH

DETAILS

...

☆

☆

□

Name

Role

Subtype

Description

Type

□

□

☆

Default template set

Document Set

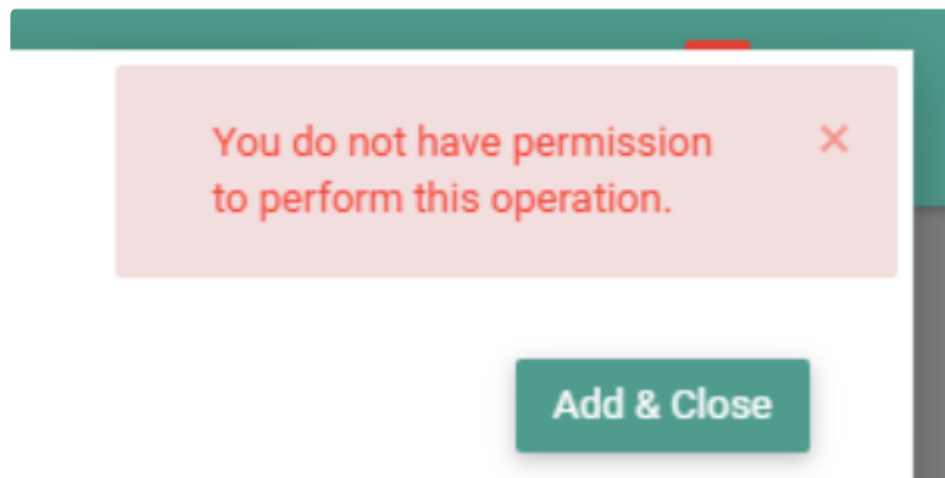
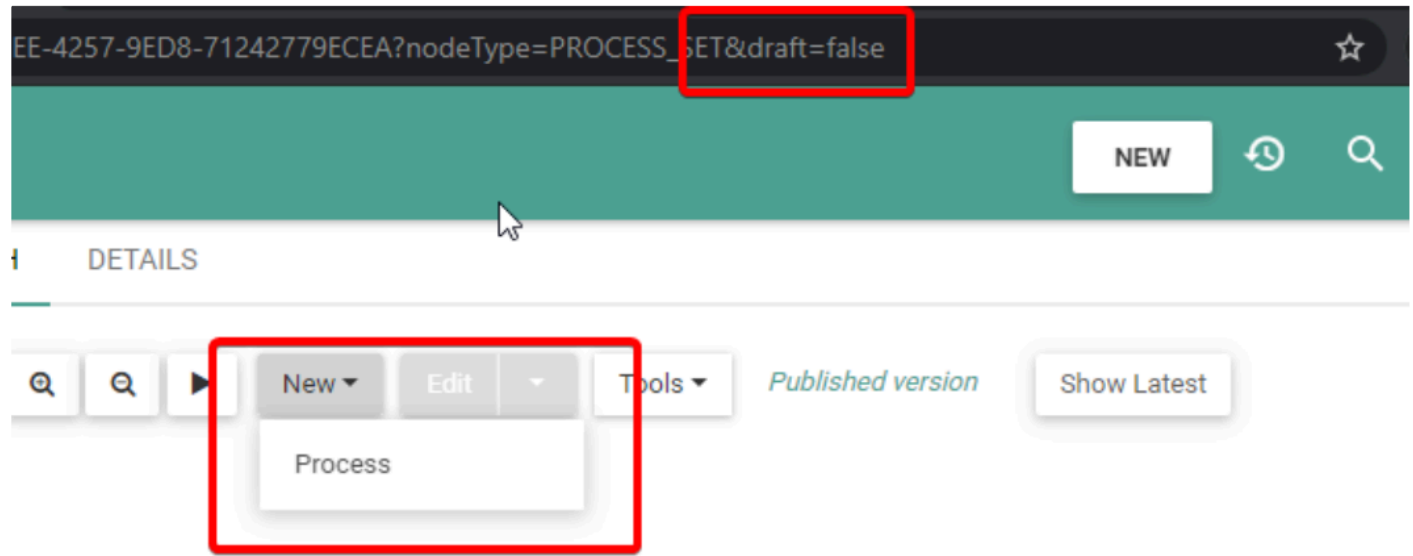
Filters

New Record Added Successfully

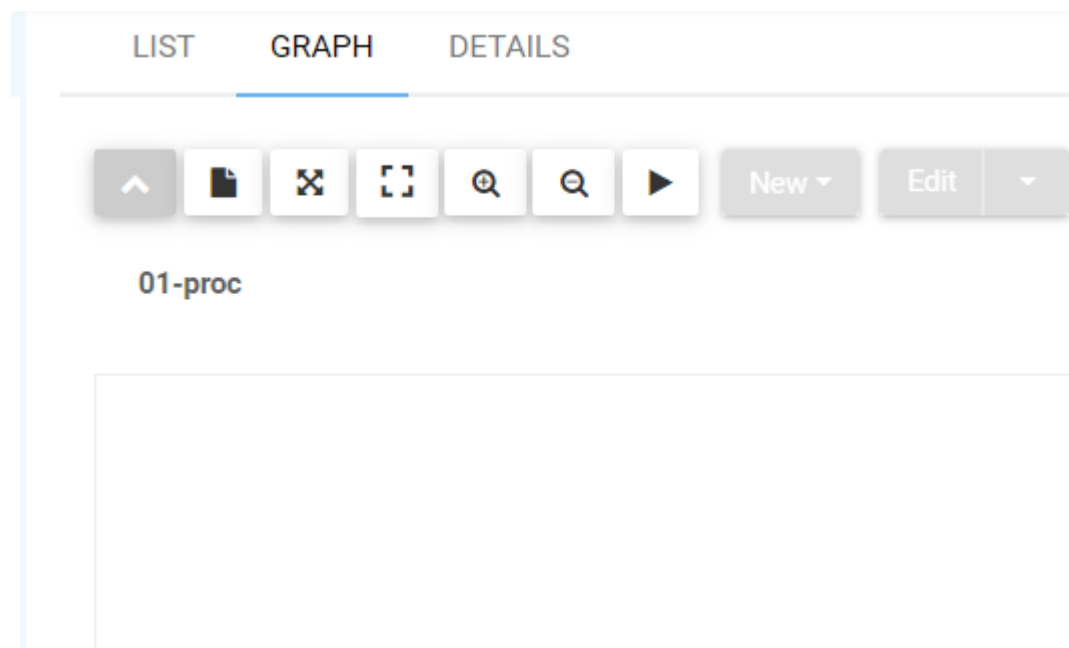
×

## Create object while in draft

When viewing the PUBLISHED (Draft=false) version in process, some users had the new button enabled and although a user could open a create NEW object form, the user would receive a permission error when saving.



Now a user can't open a form to create an object while in PUBLISHED (DRAFT=False), as the create NEW button is greyed out.



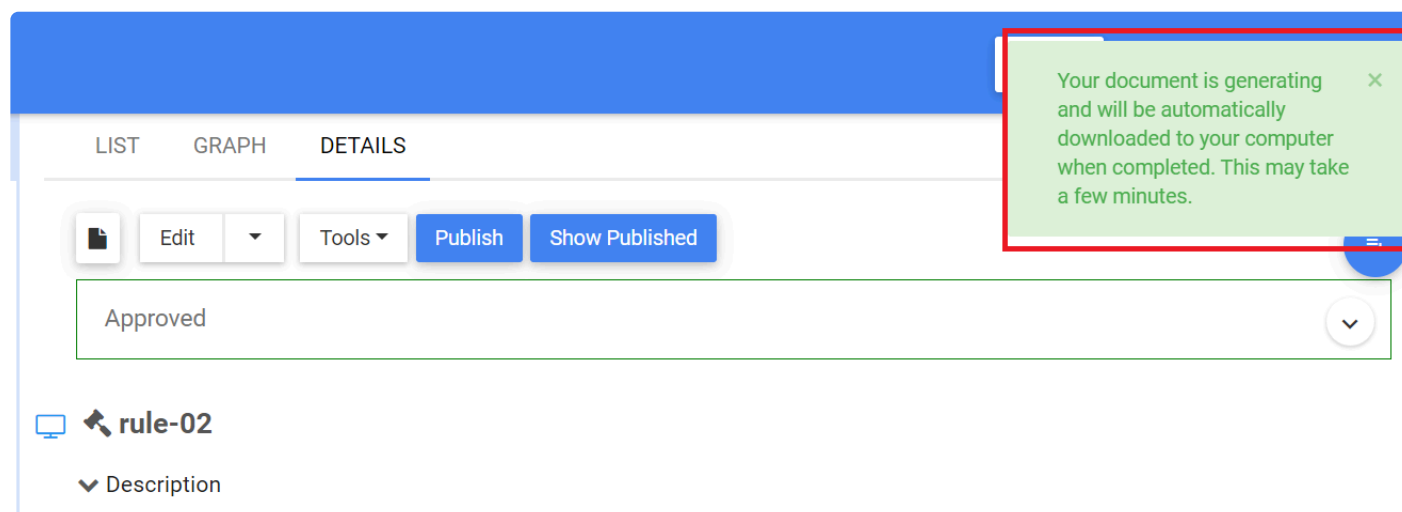
## Details Page

### Object Book

When the EPC Application is set to generate Object book in PDF form, users were experiencing issues generating them for modules Rule, Risk, etc.



Now, users can generate the object book in all the module without any problem.



Also, some users noticed that the page numbers in the Table of Contents of the generated Object book were not dynamic.

Now, the pages of the document are updated automatically.

## Indicators

When some users would try to move an Indicator (KPI, KRI, KCI) from one objective to another, the Description of the indicator didn't move with the object and appear blank.

Now users don't have problems with this, when indicators are moved, all their details are moved with them.

**KPI-01 [Draft]**

▼ Description

Ability to pay your obligations in the short-term, mainly within the next 12 months

> Documents  
 > Custom Attributes  
 > Versioning  
 > Impact

**Current Performance**

**(No Measure)**

**Add New Measure**

Measure: \_\_\_\_\_ Date: 04-08-2021, 12: \_\_\_\_\_ Comment: \_\_\_\_\_

**+ Add**

**List of Indicators**

Value	Date ▲	Comment	Created Date

<< < 1 > >>

Show: 10 - 25 - 50

## Roles

Previously, some users couldn't see Roles on Detail page or run approval/endorsement cycle using role.

**ORGANIZATION**

ROMR

00-romr +

[ar] Company -

[ar] Human Resources -

[ar] Administration

[ar] Recruitment

**LIST GRAPH DETAILS**

Name	Parent	Type
atest atest	[ar] Human Resources	Resource
User 1	[ar] Human Resources	Resource
User 2	[ar] Human Resources	Resource

This is not longer a problem, now the Roles on a resource are properly saved and users can see the role under the responsibility section in DETAILS page.

## Audit Trail

Previously, some users had problems generating the audit trail for certain objects. This problem has been resolved and does not occur in version 13.0.

Also, when a capability was assign roles, resources, assets and org units (not RASCI) and users edited for a second time and generated audit trail, the changes made in step 2 created duplicates in the next versions.

Type de changement	Champ	Langue	Action
Attribute Added	Nom	French	La valeur du champ Nom a été ajoutée
Relationship Added	Association	French	Une relation du type "Association" pointant à "[en] asset vbm" a été ajoutée
Relationship Added	Règle	French	Une relation du type "Règle" pointant à "La porte d'entrée doit être vérifiée pour être verr
Relationship Added	Association	French	Une relation du type "Association" pointant à "American Apparel" a été ajoutée
Relationship Added	Association	French	Une relation du type "Association" pointant à "[en] David Gauthier" a été ajoutée
Relationship Added	Association	French	Une relation du type "Association" pointant à "[en] HR Admin" a été ajoutée
Relationship Added	Association	French	Une relation du type "Association" pointant à "Administration" a été ajoutée
Relationship Added	Association	French	Une relation du type "Association" pointant à "American Apparel" a été ajoutée
Relationship Added	Association	French	Une relation du type "Association" pointant à "[en] David Gauthier" a été ajoutée
Relationship Added	Association	French	Une relation du type "Association" pointant à "Administration" a été ajoutée
Relationship Added	Association	French	Une relation du type "Association" pointant à "[en] asset vbm" a été ajoutée
Relationship Added	Association	French	Une relation du type "Association" pointant à "[en] HR Admin" a été ajoutée
Attribute Added	Positionnement concurrentiel		La valeur du champ Positionnement concurrentiel a été ajoutée
Attribute Added	État de la capacité		La valeur du champ État de la capacité a été ajoutée
Attribute Modified	Niveau de Maturité Actuel		La valeur du champ Niveau de Maturité Actuel a été modifiée
Relationship Added	Association	French	Une relation du type "Association" pointant à "[en] asset vbm" a été ajoutée
Relationship Added	Association	French	Une relation du type "Association" pointant à "[en] HR Admin" a été ajoutée

Now, the changes made are only shown in one version and users don't have this issue any longer.

## Risks

In the previous version, when some users were in DETAILS view of a RISK, the associated CONTROLS were not displayed. When CONTROLS section was expanded, the section would automatically close again.



## New Risk

Editing Language

ENGLISH ▾

✕

GENERAL

PROPERTIES

Add &amp; Close

What is this Risk?

+

What are the Responsibilities?

+

What is the Risk Analysis?

—

## Causes(s) and Effect(s)

Cause	Effect
-------	--------

✕

+ Add

## Gross Risk

Impact : Undefined ▾

Likelihood : Undefined ▾

Detectability : Undefined ▾

Priority

Score

## Residual Risk

Impact : Undefined ▾

Likelihood : Undefined ▾

Detectability : Undefined ▾

Priority

Score

% of Gross

Override automatic control roll-up ☐

Analysis Justification

## Controls

Select a Control

Type Control Name



Name	Assignment Type	Justification	Residual Impact	Residual Likelihood
[ar] Employee must read and sign the co...	Directly Impacts		Undefined	Undefined

This bug has been fixed, now users can see the Control section

LIST

GRAPH

DETAILS



Edit



Tools ▾

Publish

## Risk 1 [Draft]

➤ Risk Profile

▼ Controls

🔒 [ar] Employee must read and sign the contract of employment before being hired 🔄

➤ Custom Attributes

➤ Versioning

➤ Impact

## Link to object

Previously, some users were having issues seeing the description of children not being shown in link to object preview.

When users would hover on a link process and then click on Go to Object, users wouldn't description of the object.

Preview

Video Production

Description

Procedure:1112

1. Accounts: take note of available resource to work on project

2. Add project ideas to Video Tracker LTT excel

3. Writers write video script draft

4. Script draft reviewed by Linus

5. Camera operators shoot A-roll footage

6. Camera operators shoot B-roll

7. clean product

8. plan voice-over and B-roll footage

9. Record video

10. Store raw video on Whonnock server

11. Edit videos

12. Quality Control

13. Thumbnail Planning

14. Upload video

Goal

Responsibilities

Custom Attributes





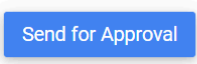
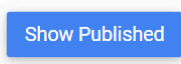

Subprocesses



Versioning


Go to Object

This issue has been resolved and now users can see the Description data.

LIST GRAPH DETAILS


 New  Edit  Tools  Send for Approval  Show Published 


 **Video Production**  [Draft]


 Description


Procedure:1112


1. Accounts: take note of available resource to work on project
2. Add project ideas to Video Tracker LTT excel
3. Writers write video script draft
4. Script draft reviewed by Linus
5. Camera operators shoot A-roll footage
6. Camera operators shoot B-roll
7. clean product
8. plan voice-over and B-roll footage
9. Record video
10. Store raw video on Whonnock server
11. Edit videos
12. Quality Control
13. Thumbnail Planning
14. Upload video


 Goal


 Responsibilities


 Custom Attributes


 Subprocesses


 Summary

 SIPOC


 Versioning


 Impact

 **Account for available resources to work on project** [Draft]

 Description

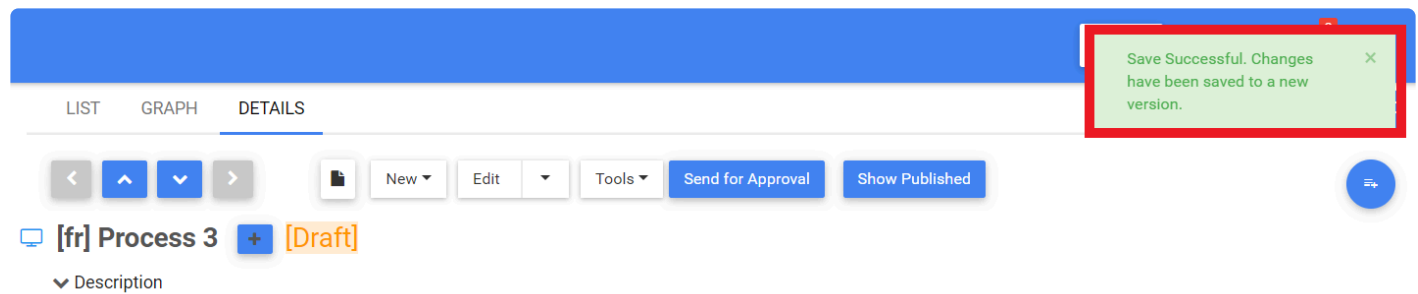
**Resource** Databases provides a searchable list of services and individual crew members seeking to provide goods and services to any organization in need. The Crew listing contains industry professionals with experience in **film**, television, commercials or stage.

 Custom Attributes

 Versioning

## Edit

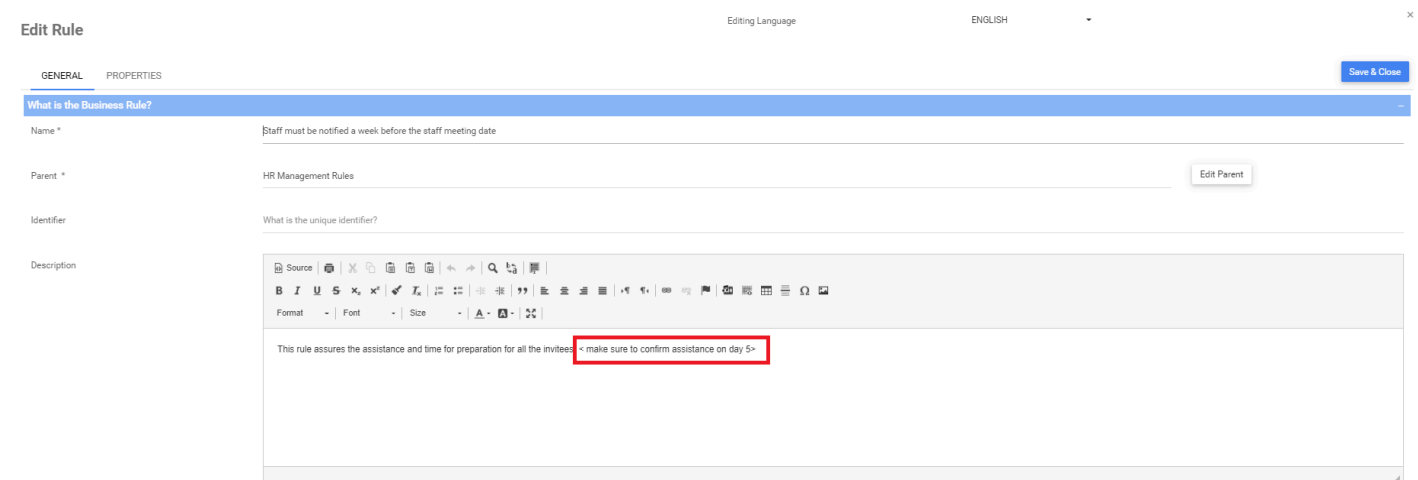
Previously, some users had issues editing objects after cancelling an approval or endorsement cycle. Now, user can edit their object without any issues when approval or endorsement cycles are cancelled.



## Description

In the previous version, some users would create a description using brackets. When users would try to edit it, they would notice that the text between brackets was not being displayed and if save the information would be lost.

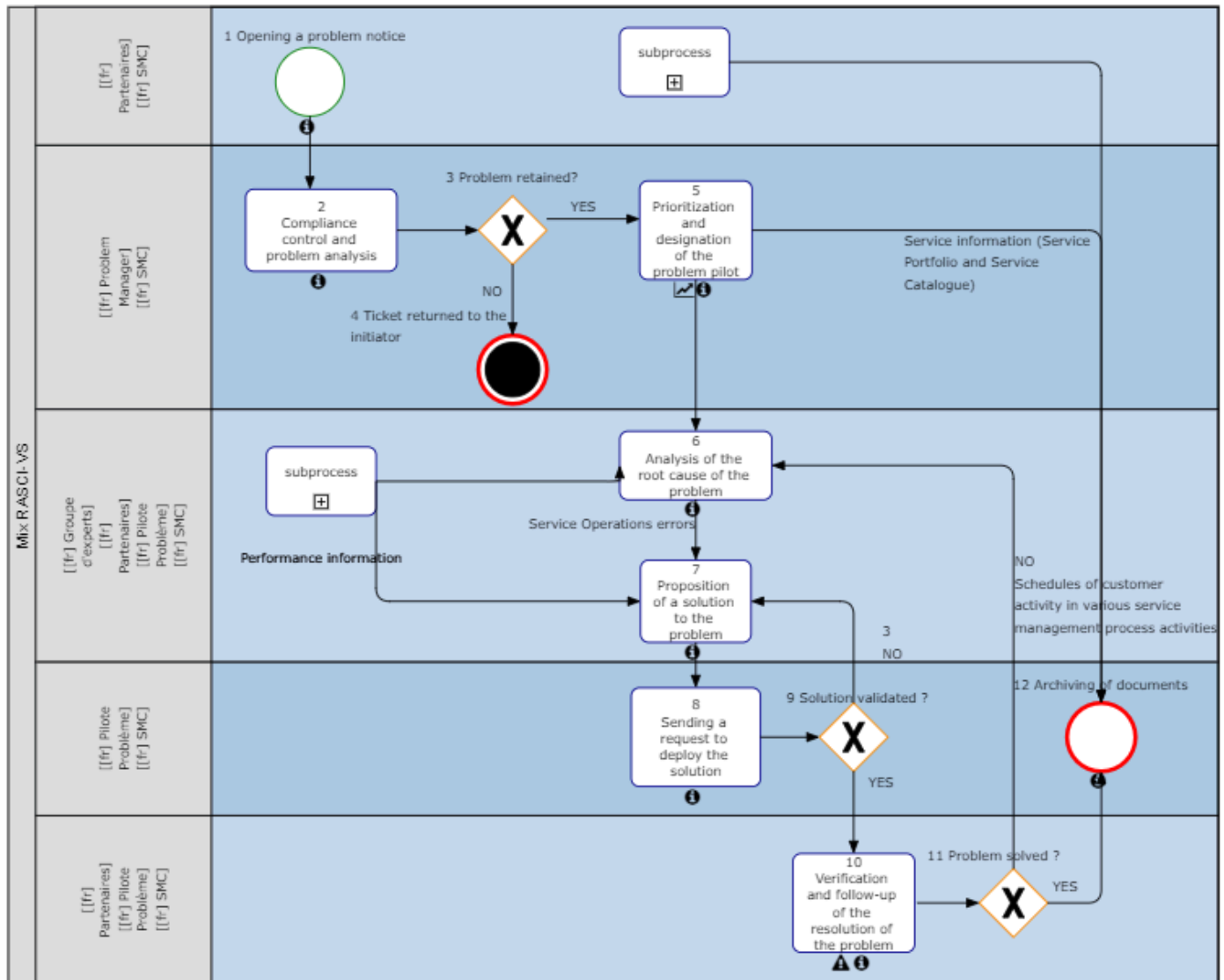
This is no longer a process, if users write text in brackets in the description and try to edited they wont loose the information.



## GRAPH Page

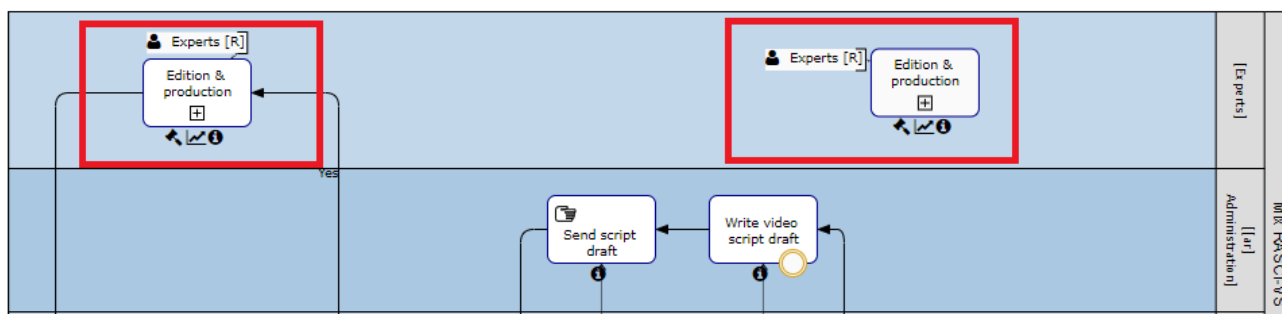
### EPC Process swimlane

In the previous version, the positions of some materials changed if a new swimlane was added to the top. Now, the materials maintain their position.



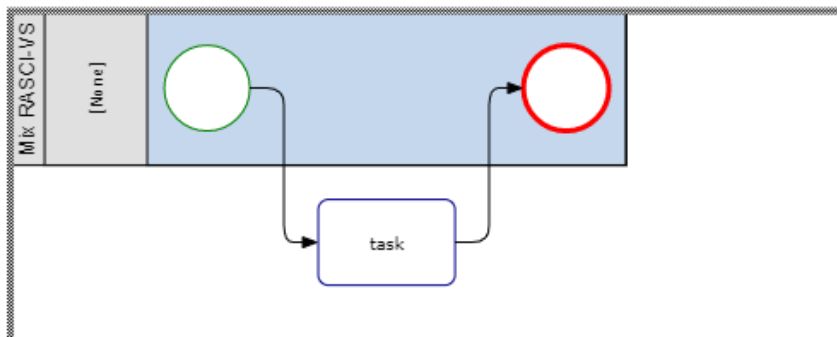
## Copy Rasci in Graph

Some users were having issues copying the RASCI from flow objects, when pasting the flow object would take the responsible as the one in the swimlane. This issue has been solved. Now, users can copy the flow object and the correct RASCI is copied.

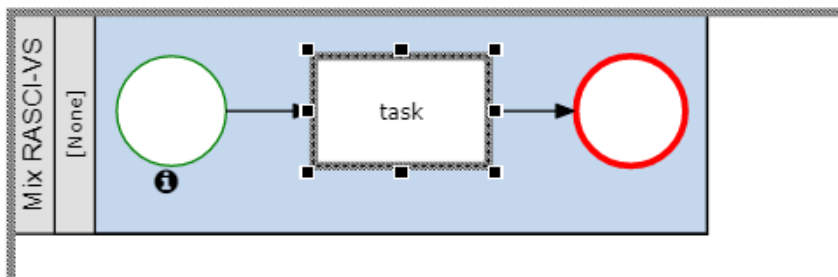


## Flow Objects

Before in EPC, users encounter a problem when editing a graph and moving Flow Objects, the moved objects would move outside of swimlane after moving shape and running auto layout.



This is no longer a problem, when moving objects and using auto-layout the Flow Objects remain in their lanes.



## Annotation

Before, when a event/gateway name was set to annotation, and shape was double-clicked in edit, there will be an annotation of the name and an icon of the name. If the user expands the name icon, then there will be 2 name annotations.



Now, the labels are working properly. if users selected in Mapp Options Name Gateway as Annotation then the written name is displayed. If users selected in Map Options Name Gateway as ICON, then an icon is

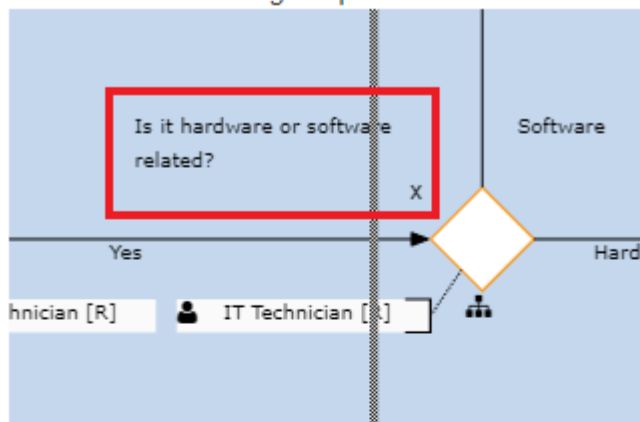
displayed.



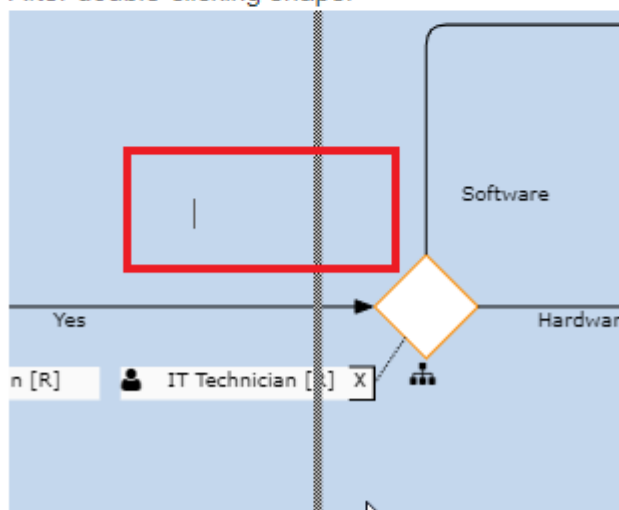
## Gateway /Event Name

In the previous version, If Gateway/ Event name was set to icon or annotation in Map Options. when some users in Edit process, double-clicked the Flow Objects to edit existing name, the name label would appear empty

Before double-clicking shape:

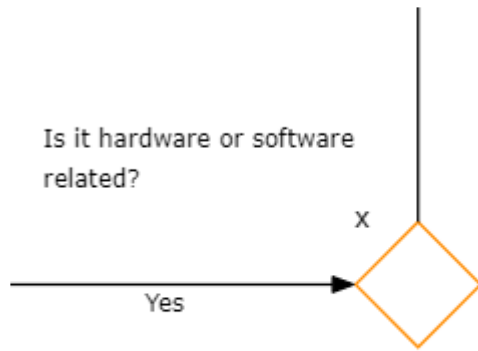


After double-clicking shape:



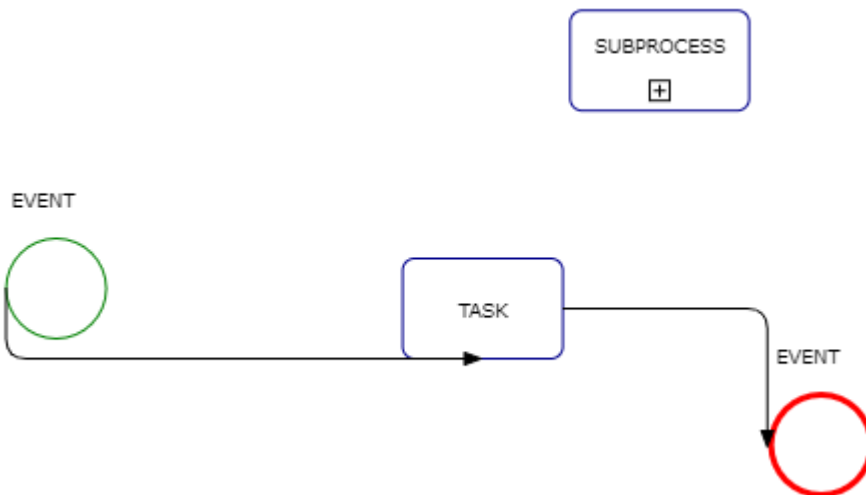


Now in EPC, when users double-click on shape that already has a name, the text is displayed.

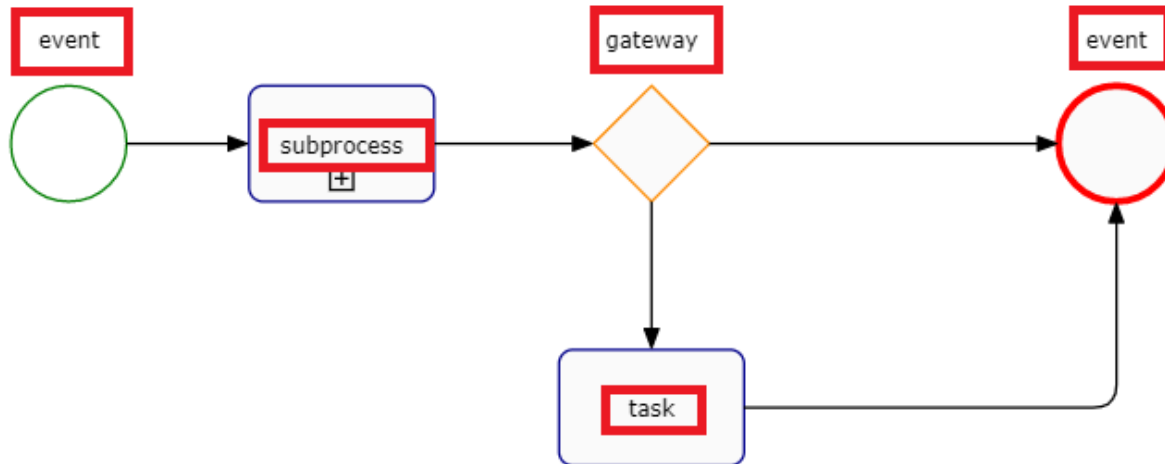


## Flow Objects names

Previously, when creating a new process, the names of the flow objects were displayed in capital letters.

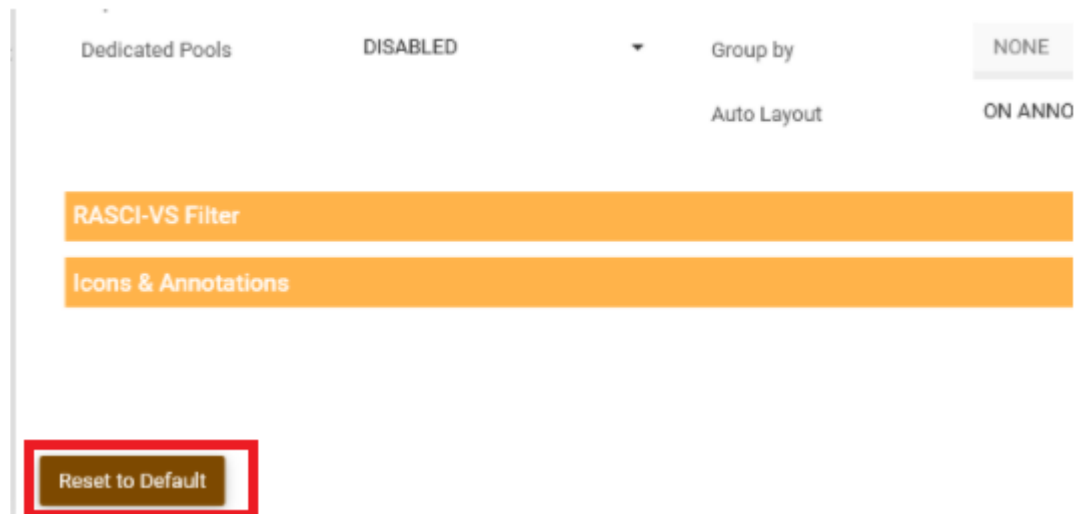


Now, the names of the flow objects appear in lower case letters.

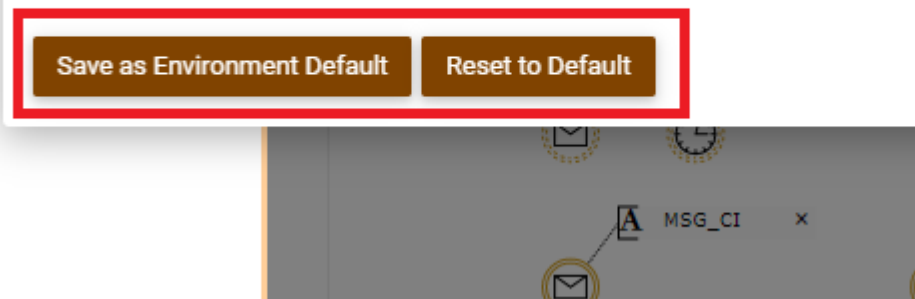


## Map Options

Before, when some system admin or an environment admin were in Map Options, they weren't able to see the button Save as Environment Default



Now, users can see the two buttons.



## Compare

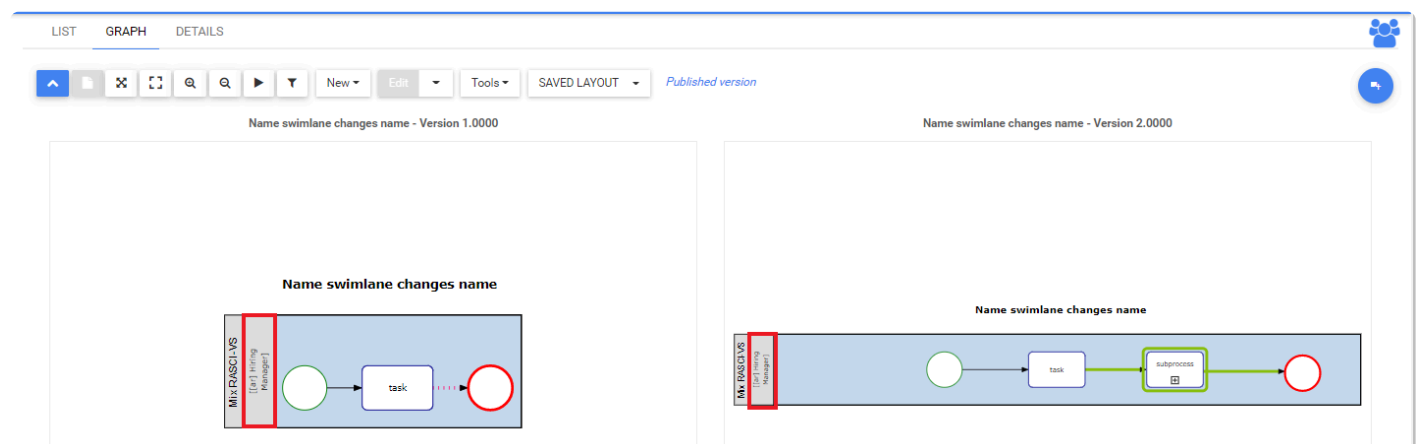
Before, when comparing the versions of a process, the asset would show the wrong name in the older version. Now this is not a problem, the right name of the asset is displayed when comparing.

## Map Settings – Performance Color Settings

Previously, some users noticed that in Map Settings, Performance color setting was being displayed and node color was hidden when users system didn't have Performance module license. This have been fixed. Now, if users don't have Performance module license, the performance color setting in Map settings is hidden and the node color remains displayed.

## Swimlane name

In the previous version, some users noticed that the title of the role in the swimlane switched to none in compare and all objects have yellow highlight for no reason

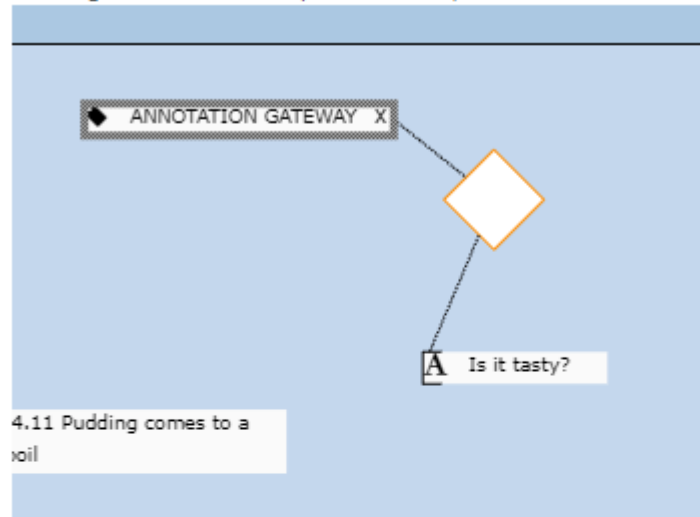


As we can see in our image, this is no longer a problem.

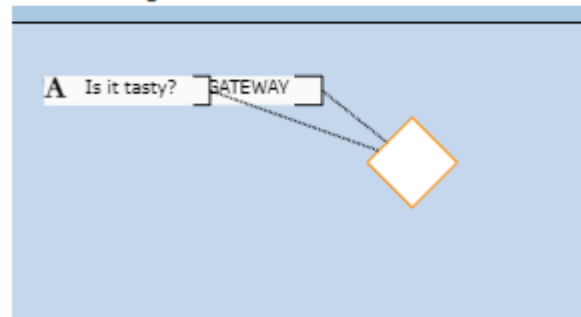
## Event/Gateway Annotation

Previously, some users experienced problems with the position of event and gateways names. Once users set the positions of the names and Save&Close, the name was positioned above the annotation.

### Moving the annotation (before save)



### After saving:



This is no longer a problem. Now, when users position the annotation, they keep their respective positions.

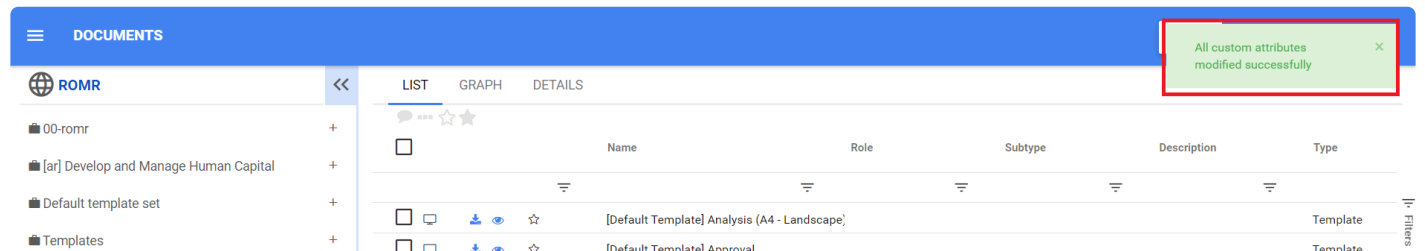
## List Page

### Capability Module

In the previous version, some users in Capability or Process module noticed a double load of the page. In EPC 13.0 this is no longer an issue.

## Multi – Custom Attributes

Before, when editing the Custom Attribute of several objects and adding images to the Text fields, the changes would not be saved and an error would appear. Now, users can save form without any problem.

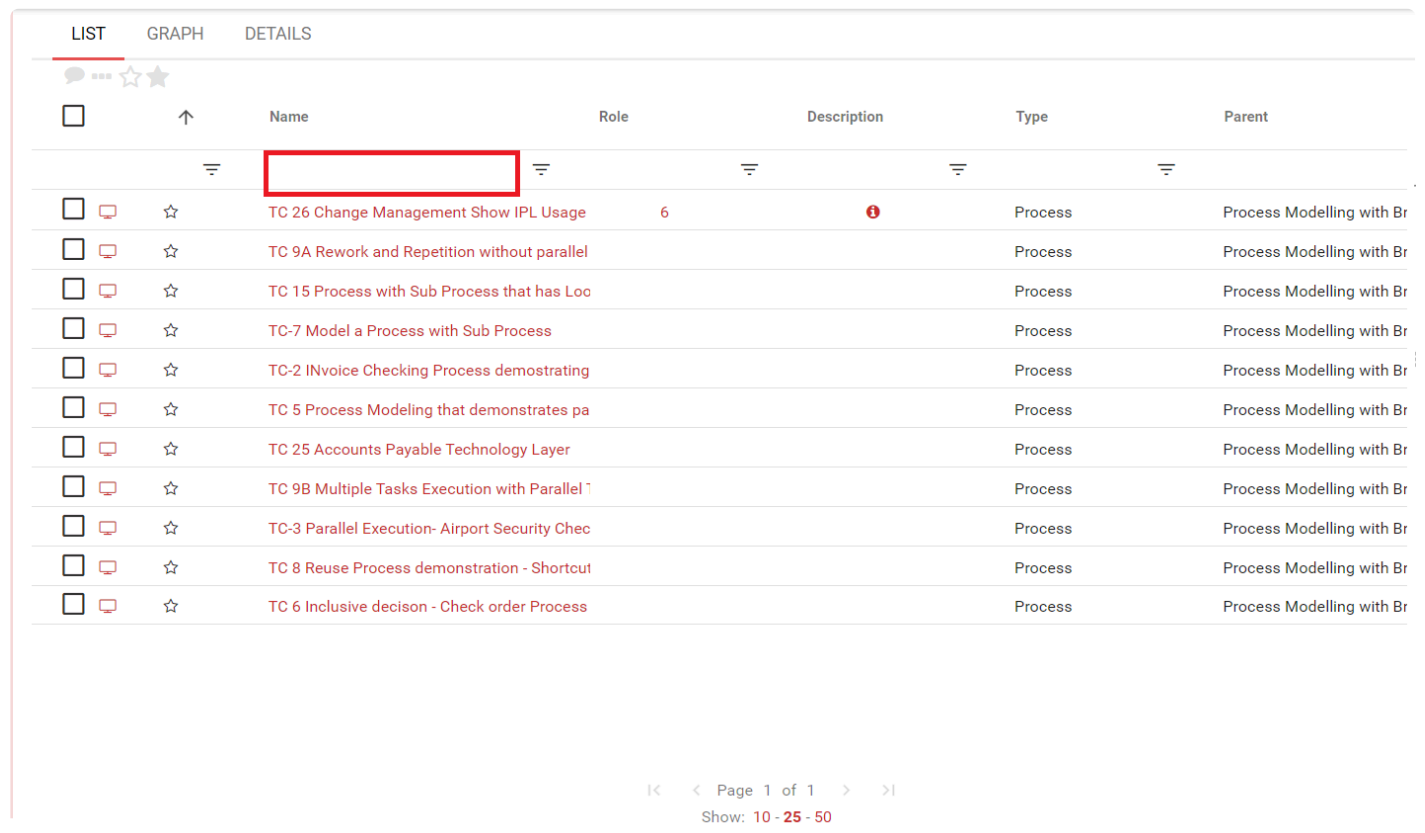


## Move

Previously, when a object was published and then moved to another set, if the second set was published, the objects would appear back in the first set. This is no longer an issue, the object are moved correctly and stayed where they were moved.

## Filtering Process by Parent

Before, some users were having issues filtering processes by parent. Now, this is not longer a process.



LIST							GRAPH	DETAILS
<div><div><div></div><div></div><div></div><div></div></div><div><div></div><div></div><div></div><div></div></div></div>								
<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>
		TC 15						
<div><div></div><div></div></div>	<div><div></div><div></div></div>	TC 15 Process with Sub Process that has Loo					Process	Process Modelling with Br

# Introducing: Native iOS & Android Mobile App (with OFFLINE Access)

---

## Functionality

Users can now access EPC from their phone or tablets, online and offline anywhere, anytime. This allows our users to access their content, quickly, & securely while promoting quality management.

Discover new ways to interact with EPC on Mobile! Login to your account and influence the future of Business Process Workflow management. Whether it's your smartphone or tablet, we've improved the user experience and increased productivity for your entire organization.

Access your content, quickly, & securely. Make your workflow or forms mobile!

- Want to look up models quickly in EPC but not at your desk right now? Access your EPC content with a tap of a finger on your mobile device.
- Is someone waiting for a process model? Share it immediately as a graphic.
- Your team is waiting for an approval, you can now login and approve the changes right away.
- Need to access models offline? Browse for content on your EPC server and make the content to save on your device so you can access it later without a connection

Users can download the EPC app from the Apple or Android Store

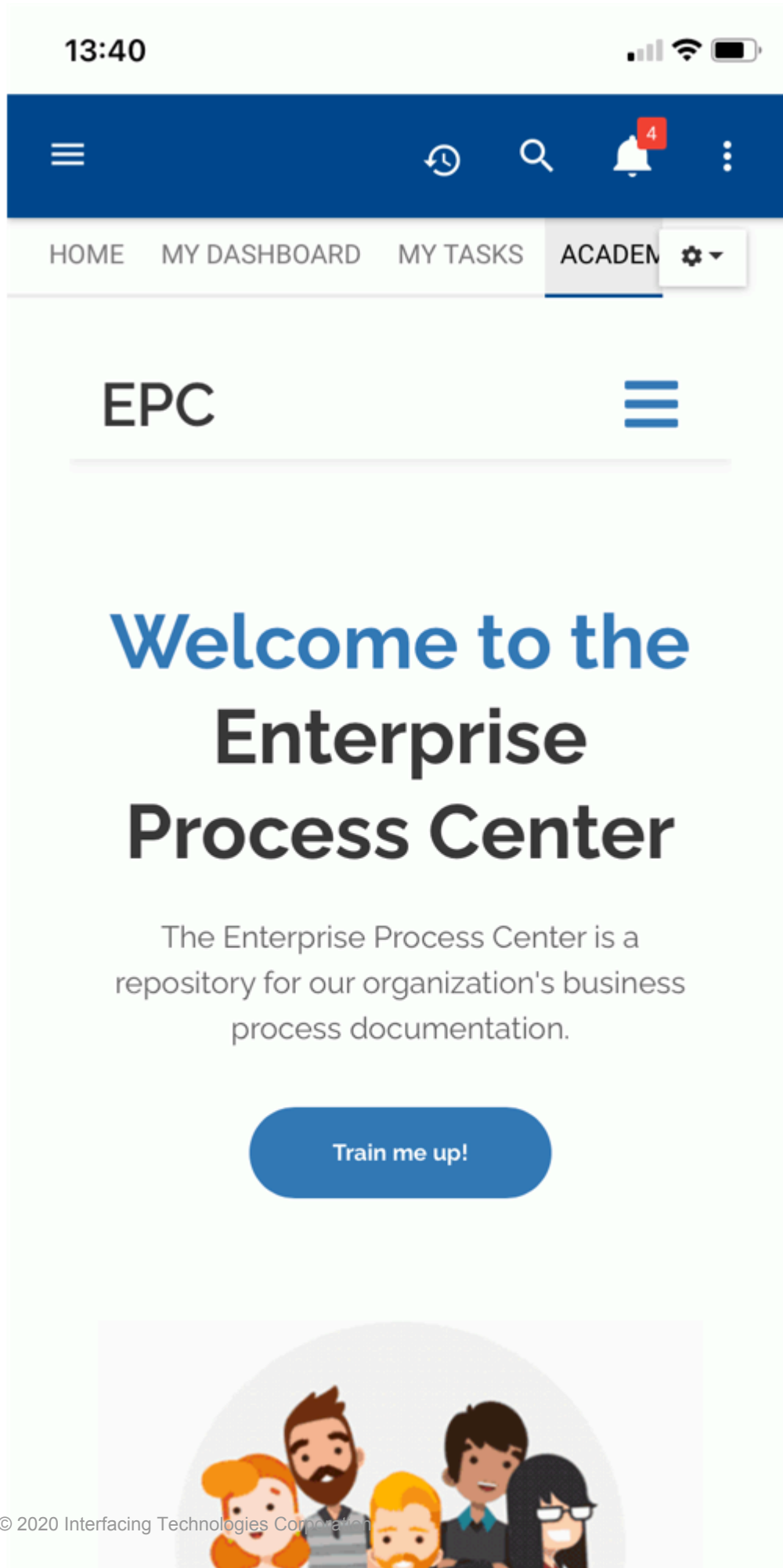
## Customization

Supported content types include:

- Process
- Document
- Performance
- Organization
- Risk, Control, & Rule
- Master Data
- Glossary

## How it works

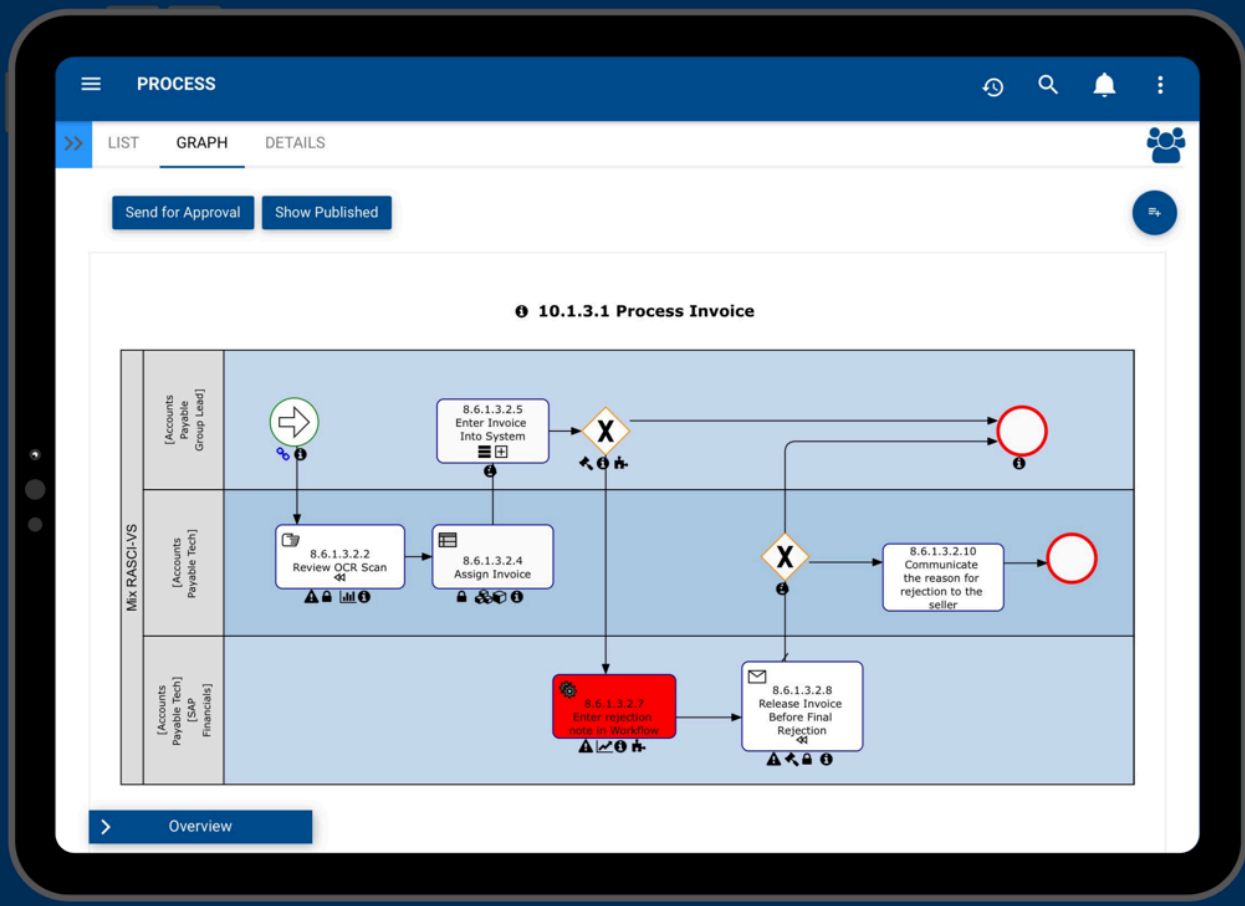
Login to your account from your phone or tablet,





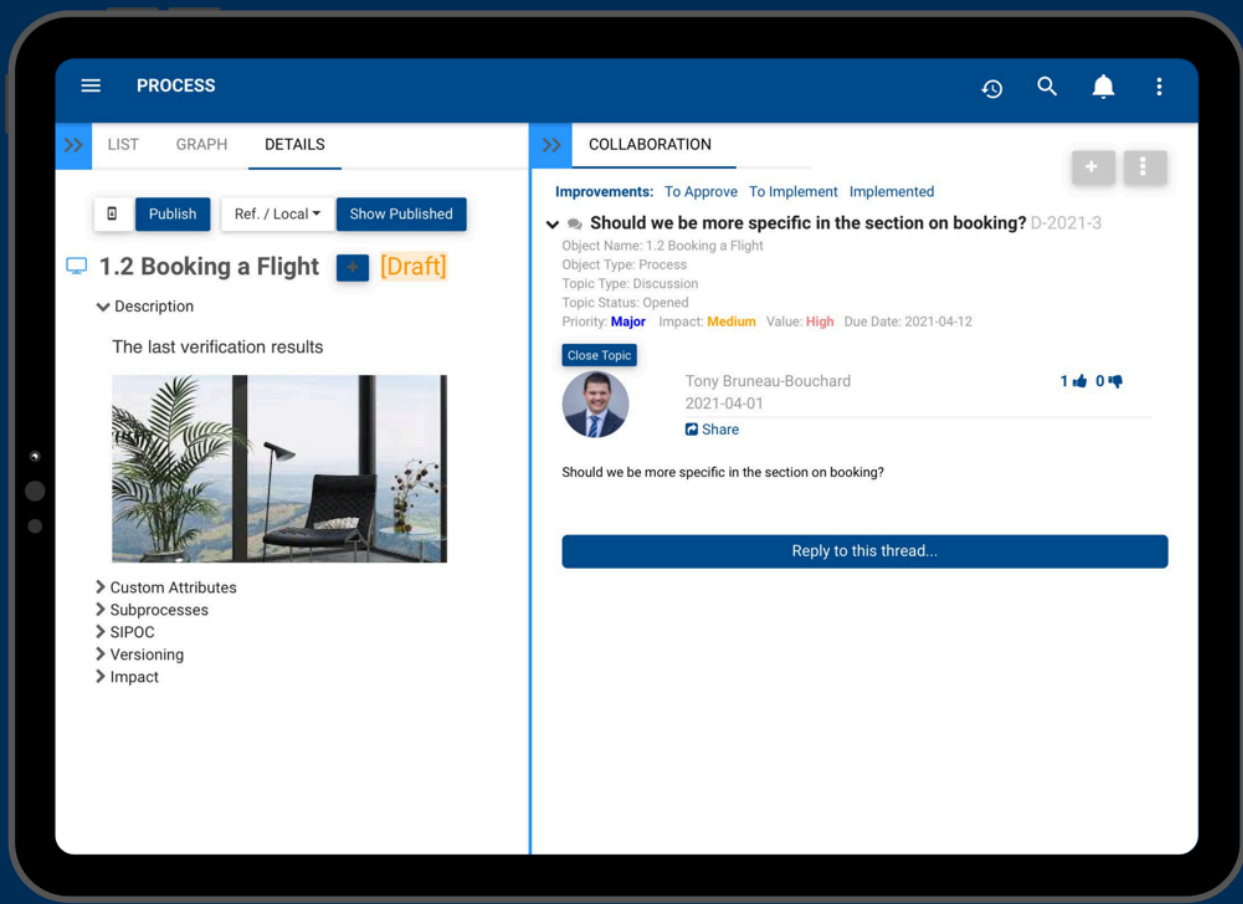
## View Process Models

Choose your graph layout



## Content Collaboration

## Request and grant approvals



# Access Offline Mobile App

---

## Functionality

In EPC offline mobile app, when users are in their phone or tablet, users can set their app offline and access their information saved offline whenever and at anytime.

## Customization

When a user set their app offline, then they can see the information saved on their account online.

## How it works

The EPC mobile App in online mode, works similar to the EPC in desktop. First, users log into the application in online mode



User Name

---

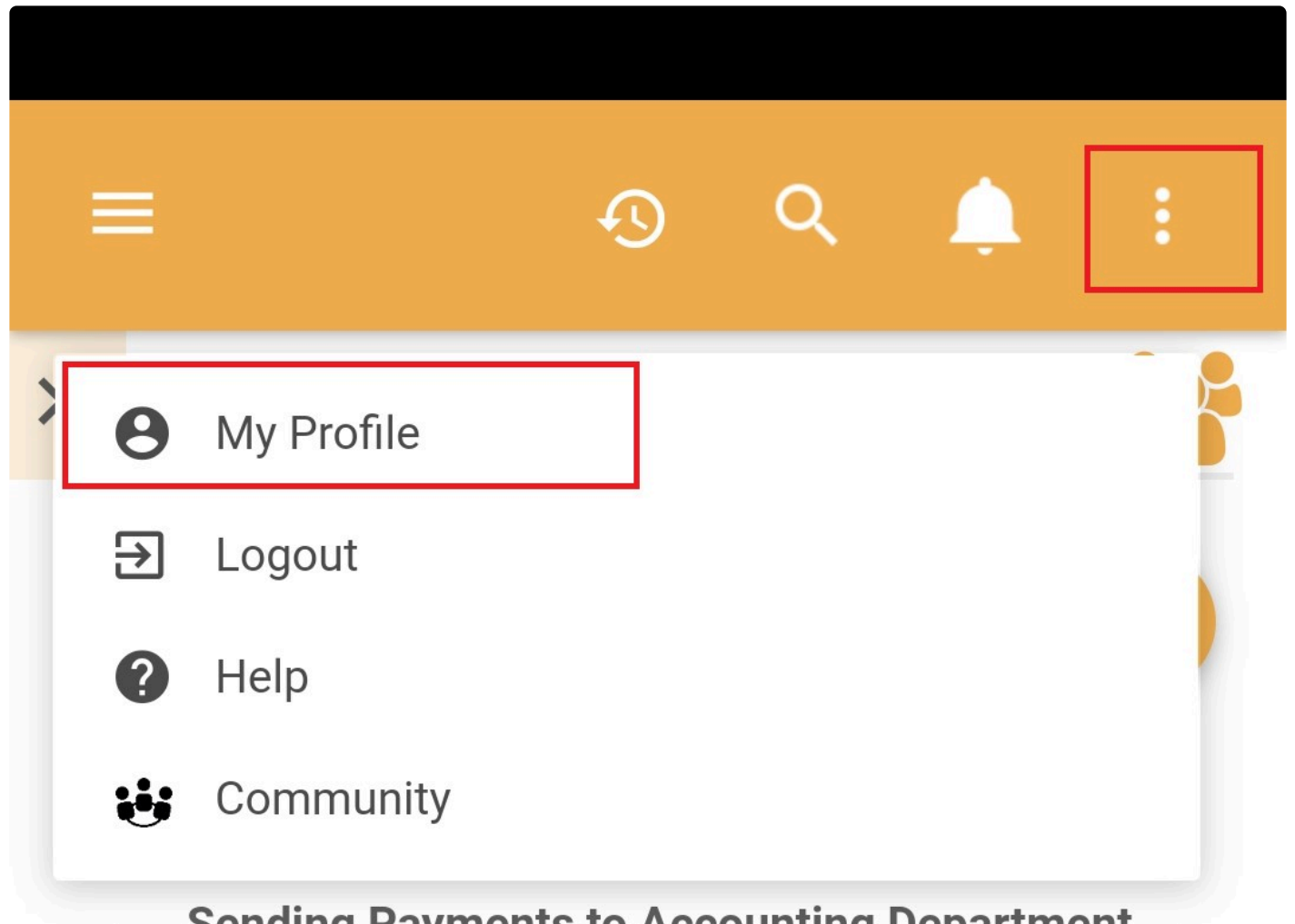


Password

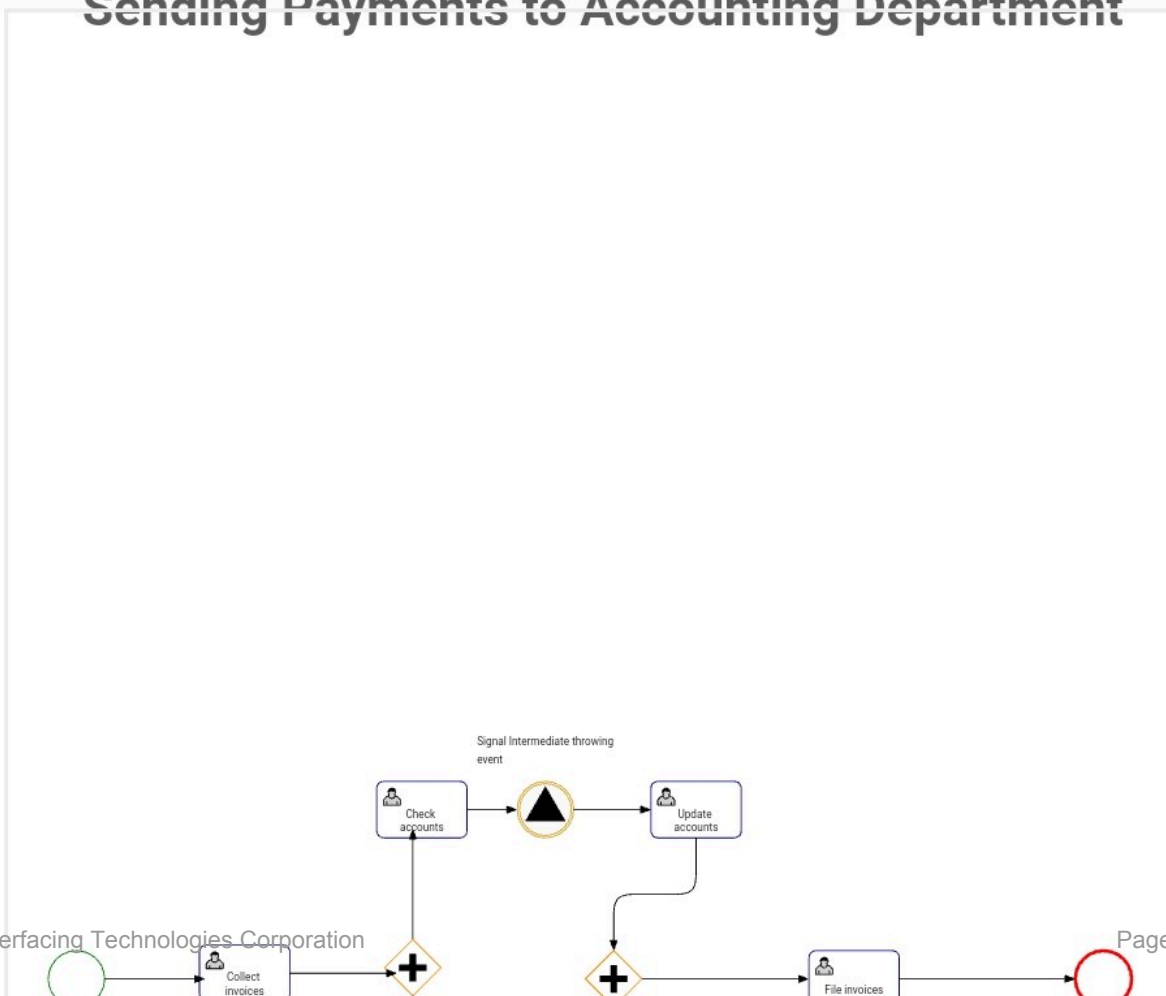
---



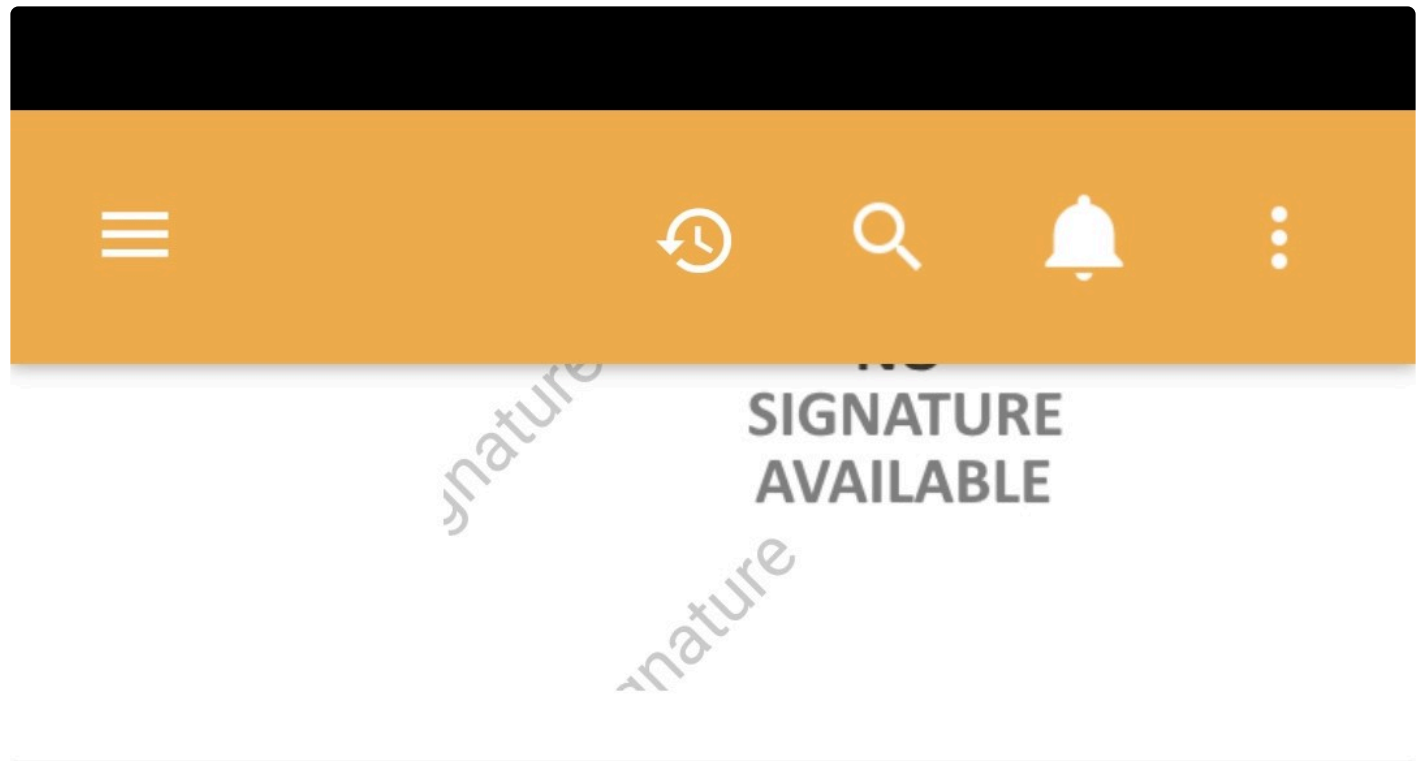
To set the app offline, users can go to their profile by clicking on the three-dots icon on the top right of the page.



## Sending Payments to Accounting Department



Once in the profile page, scroll down to the end of the page. there, users can select go offline



## Authorizations



Administrator



Modeler Access



WebApp Access



EPC will stop using data or wi-fi and show all the information saved in home page.

# Home Page Offline

---

## Functionality

In EPC offline mobile App, in home page users can see all the saved objects under its respective section. Making it easier for users to see their saved objects in all modules.

## Customization

Sections in Homepage:

- My Offline Processes
- My Offline Documents
- My Offline Performance
- My Offline Organizations
- My Offline Risks
- My Offline Controls
- My Offline Rule
- My Offline Master Data
- My Offline Glossary

## How it works

Once user are in offline mode, users are redirected to home page.

2:51

31

LTE+  
72%

## My Offline Processes

ie	Type	Sync
7 Process Modeling with Sig...	Process	10-September-2021
Track Payments	Process	10-September-2021



## My Offline Documents

Name	Type	Sync
[Default Template] Analysis (A4 - ...	Document	10-Septembe



if users have been navigating in other modules, users can simply click in the burger icon in the top left corner. in menu click on Home.

# Preferences offline mode

---

## Functionality

In EPC offline mobile app, users can change interface language and the environment, allowing them to see the offline app in their preferred language and the objects in the different environments.

## Customization

In offline mode users can't change the content language

## How it works

Users go to the profile page, there, users can change the language content and the environment they prefer.



## Preferences

### Environment

Formation

## Language

### Interface Language

English

There users can click on the interface language or environment and a list will open with all the interface languages



## Interface Language

English



English



Français



العربية



Español





Italiano



中文



Once users have selected their preferred language or environment, then the interface will be set in the selected option.

11:30    • 87% 


## Langue d'interface


Français

---

## Autorisations

 Administrateur

 Accès au Modélisateur

 Accès au WebApp



# Modules in Offline Mobile App

---

## Functionality

The EPC offline mobile app offers nine modules, in this modules users can save objects online and be able to review them offline.

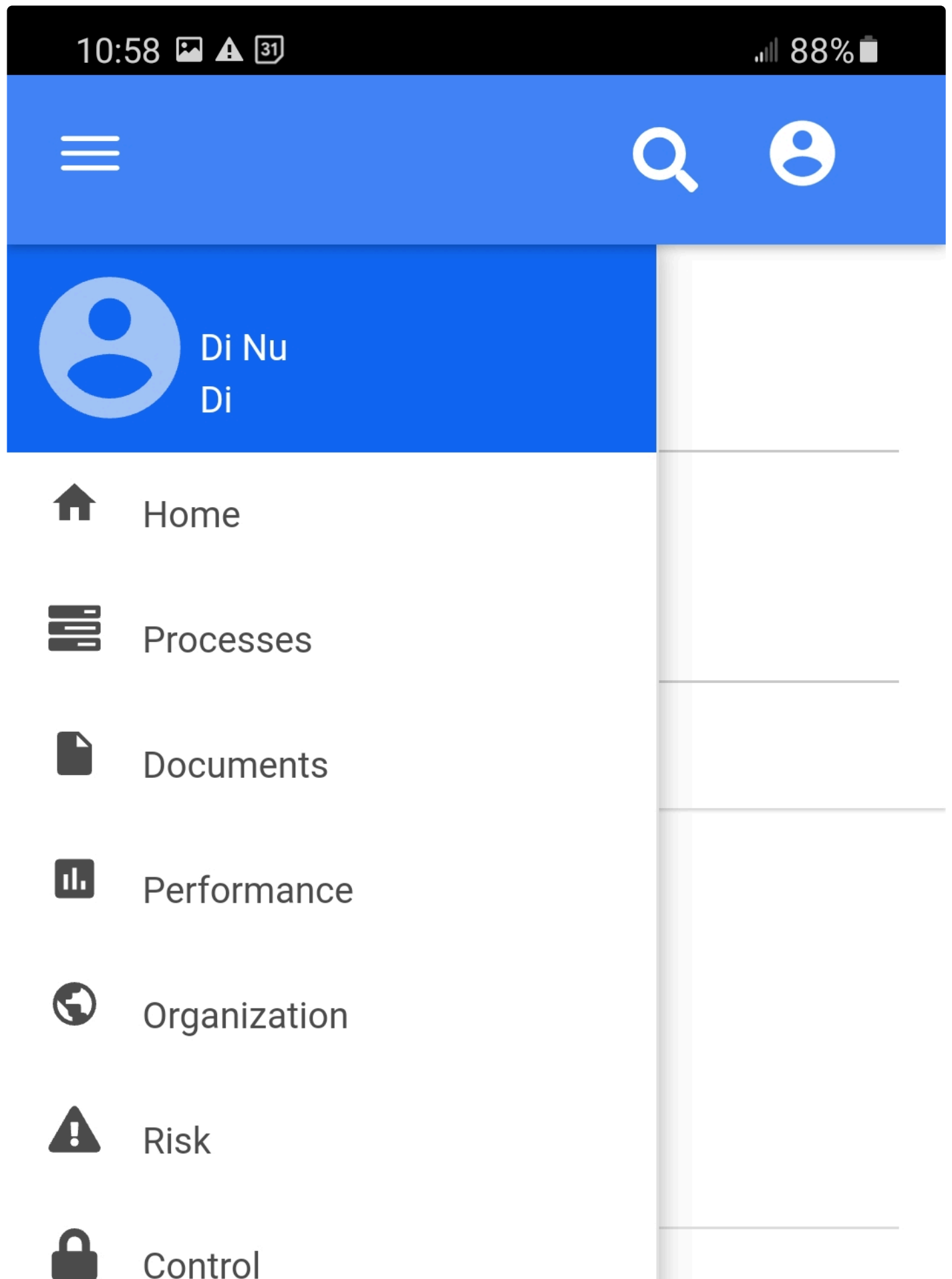
## Customization

Users can access the following modules in offline mode:

- Process
- Document
- Performance
- Organization
- Risk
- Control
- Rule
- Master Data
- Glossary

## How it Works

Users just need to go to the offline mode, then by clicking on the three-line icon on the top right, the menu with the different modules opens. There user can go to the module they want to explore and see their saved information.





# Objects saved offline

---

## Functionality

In the EPC offline mobile app, users can see all their saved object inside their selected module and in homepage.

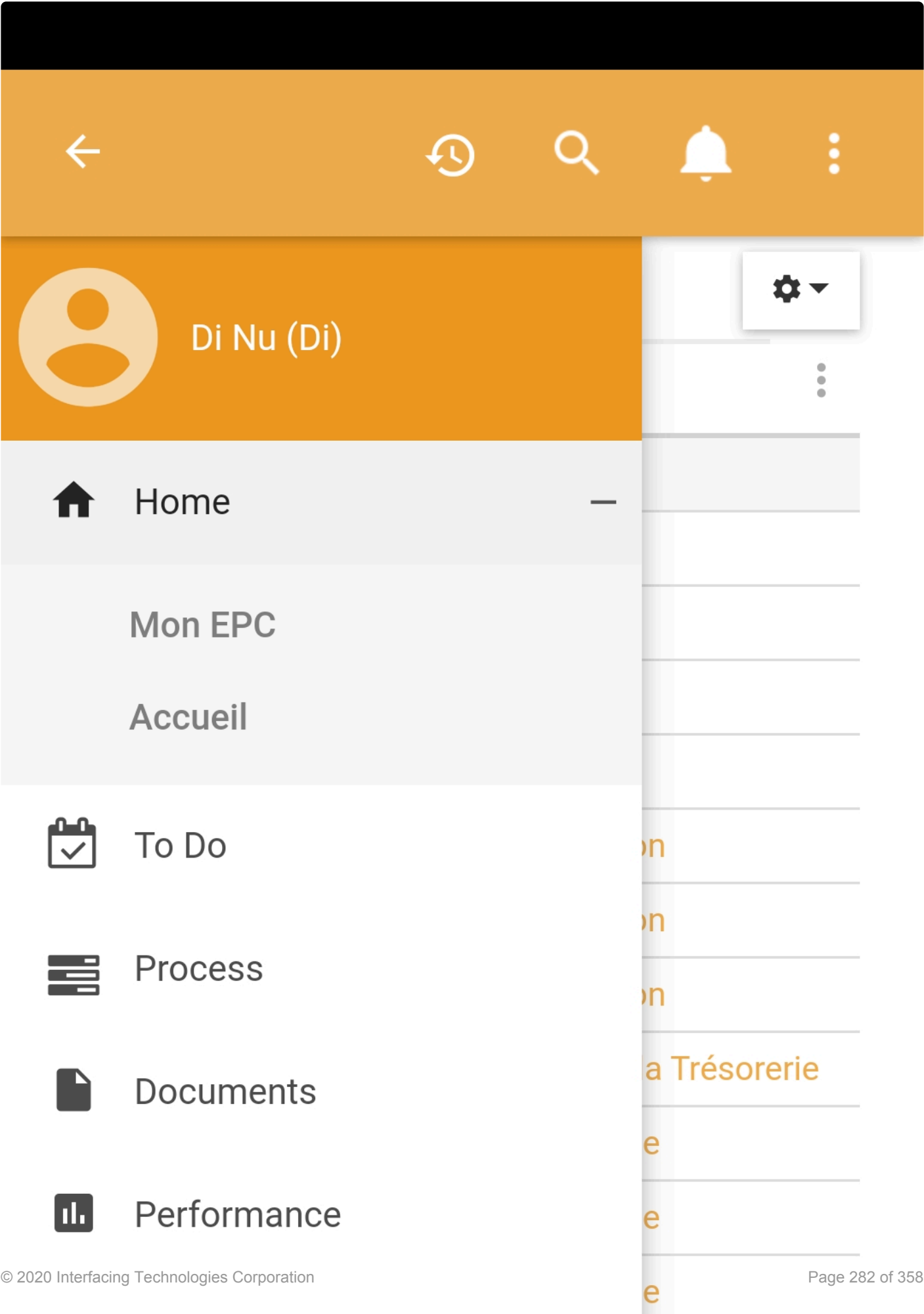
## Customization

When the device is online on a network allowing sync, all offline content will be auto-updated with latest version.

If an object was available offline but during the offline period someone removed the “read” permission on the object for the user, then when the user goes online the content is removed from the saved offline objects.






## How it works


To save an object offline, users navigate to the three-lines icon on the top left of the page and select a module.







Then select the object they wish to see. Use the arrows in the top right side to go to LIST page of the object.




 **FORMATION**




 OMP


+

 Problem Management


+

 Process Governance


+

 Process Modeling with Extensive Use of Ar...


+

 Process Modeling with Specific Tasks


+

 Process Modelling - with Linear Sequence ...


+

 Process Modelling with Branching and Mer...

+

 Process Modelling with events

-

 **TC 10 Modelling with Timer Events- Drivii...**

There, users can navigate between GRAPH, DETAILS and LIST page. To go back to the tree of the module, use the arrows in the right side of the screen.

>>

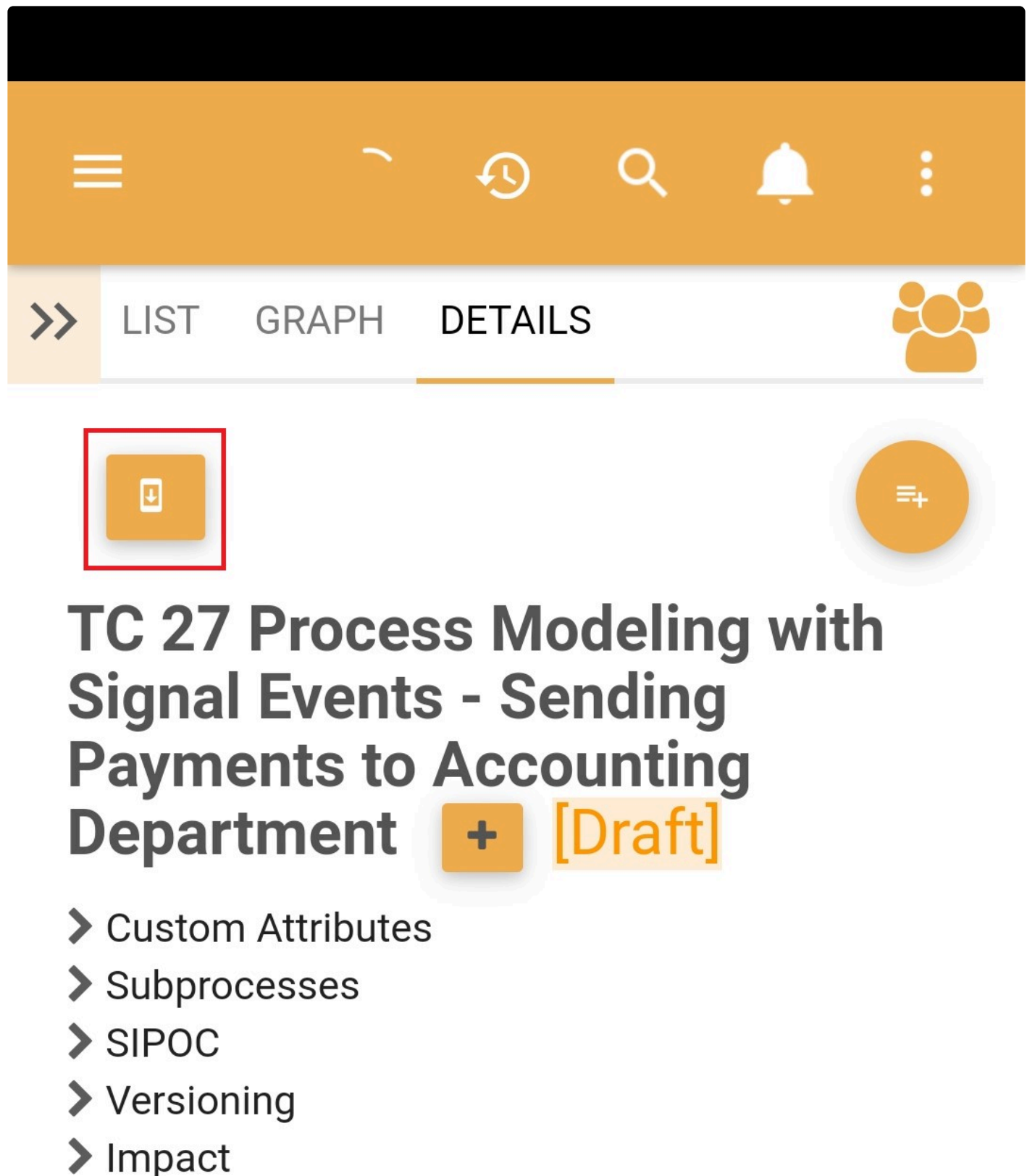
LIST

GRAPH

DETAILS

	Type	Nar
	Task	Ch
	Task	Ch
	Task	Col
	End	eve
	Start	eve
	Process	Fas
	Task	File
	Gateway	gat
	Gateway	gat

In DETAILS page, users can **save locally** the object to access it offline. Click in the phone icon on the right side. once the object has been saved locally a confirmation message appears in green with the words Saved Locally



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EPC Release Notes - 13\_en

Menu icons: List, Undo, Redo, Search, Notifications, Settings

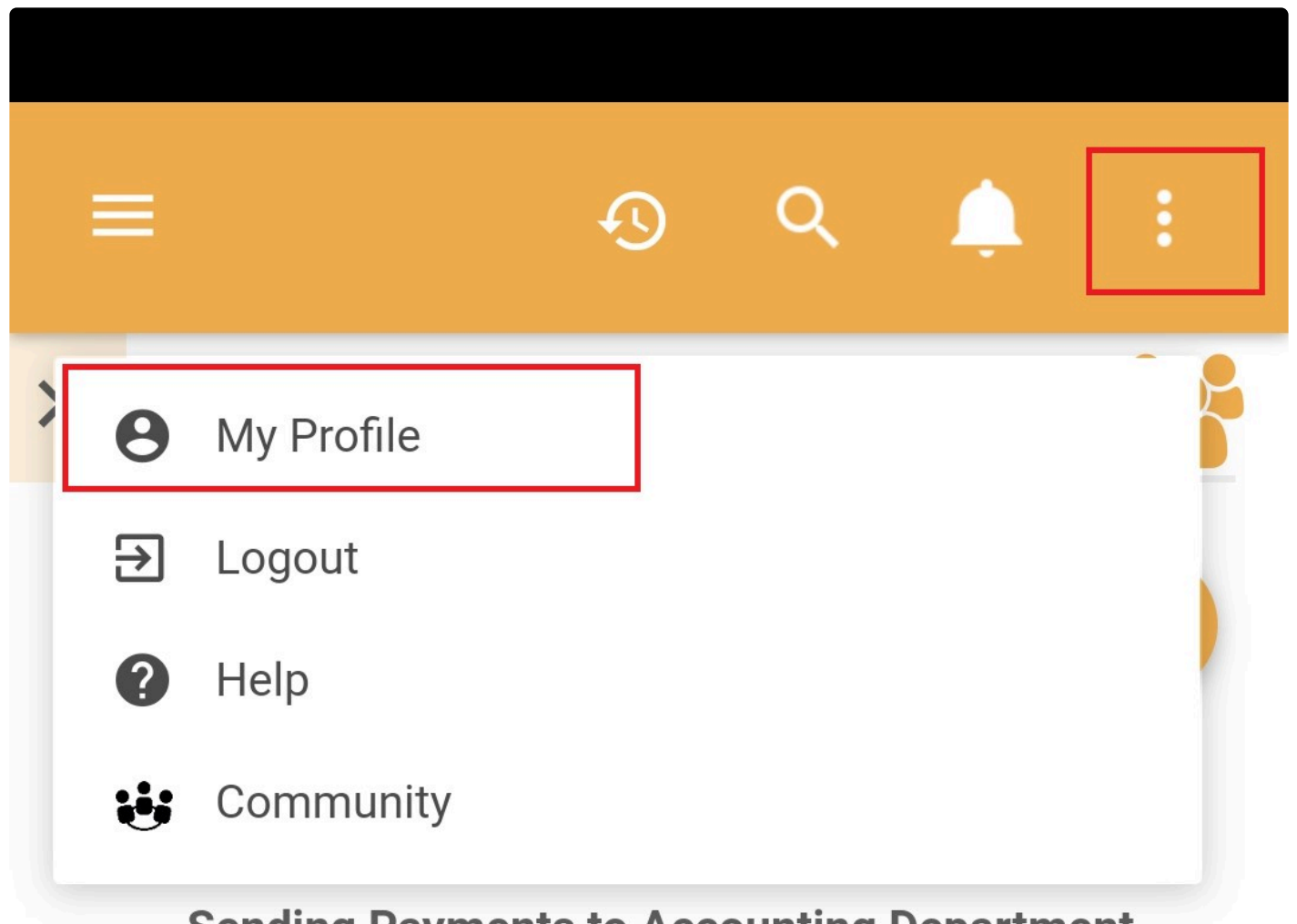
Tab bar: LIST, GRAPH, DETAILS

Download icon (highlighted with a red box)

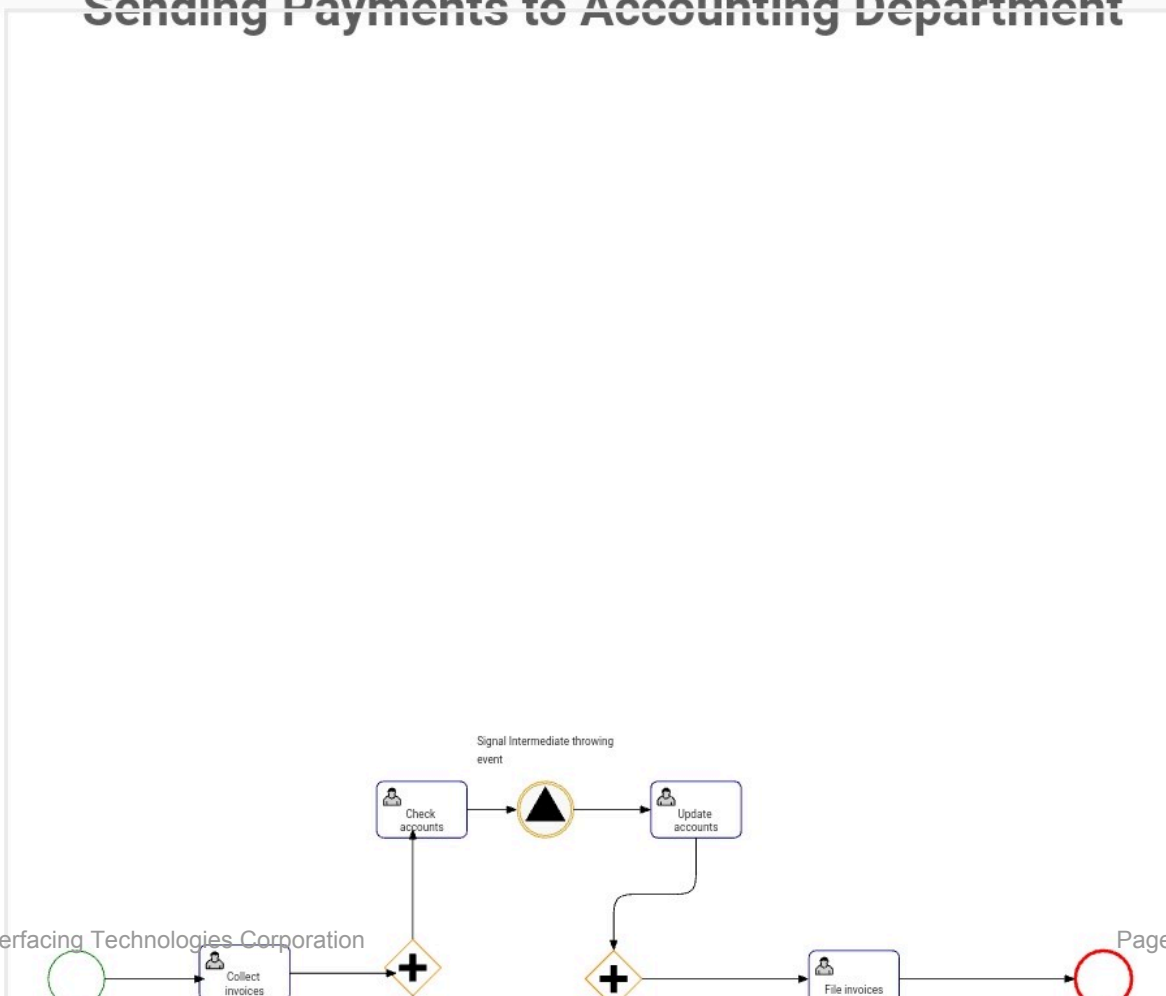
TC 27 Process Modeling with Signal Events - Sending Payments to Accounting Department **+** [Draft]

- Custom Attributes
- Subprocesses
- SIPOC
- Versioning
- Impact

To set the app offline, users can go to their profile by clicking on the three-dots icon on the top right of the page.

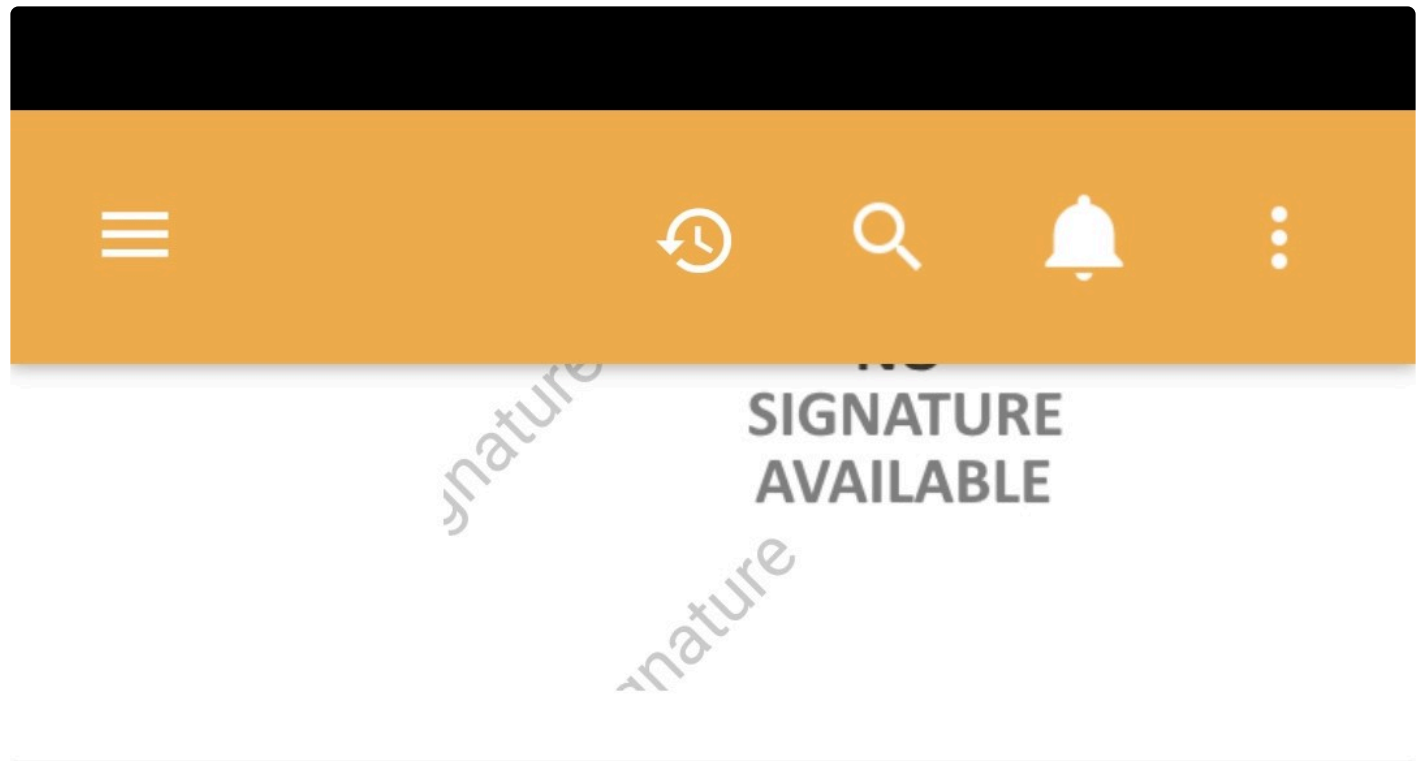


## Sending Payments to Accounting Department





Once in the profile page, scroll down to the end of the page. there, users can select go offline



## Authorizations



Administrator












Modeler Access



WebApp Access

EPC will stop using data or wi-fi and show all the objects inside of then that have been save locally. To go to the object, users can click on the name of the object and they will be redirected to the DETAILS page of their object offline.

5:16    •   30% 



  

>

LIST

GRAPH

DETAILS

Type	Name	Docu
 Process	TC 27 Process Modeling with Sig...	
 Process	Fast Track Payments	



# Process Module – Offline Graph

---

## Functionality

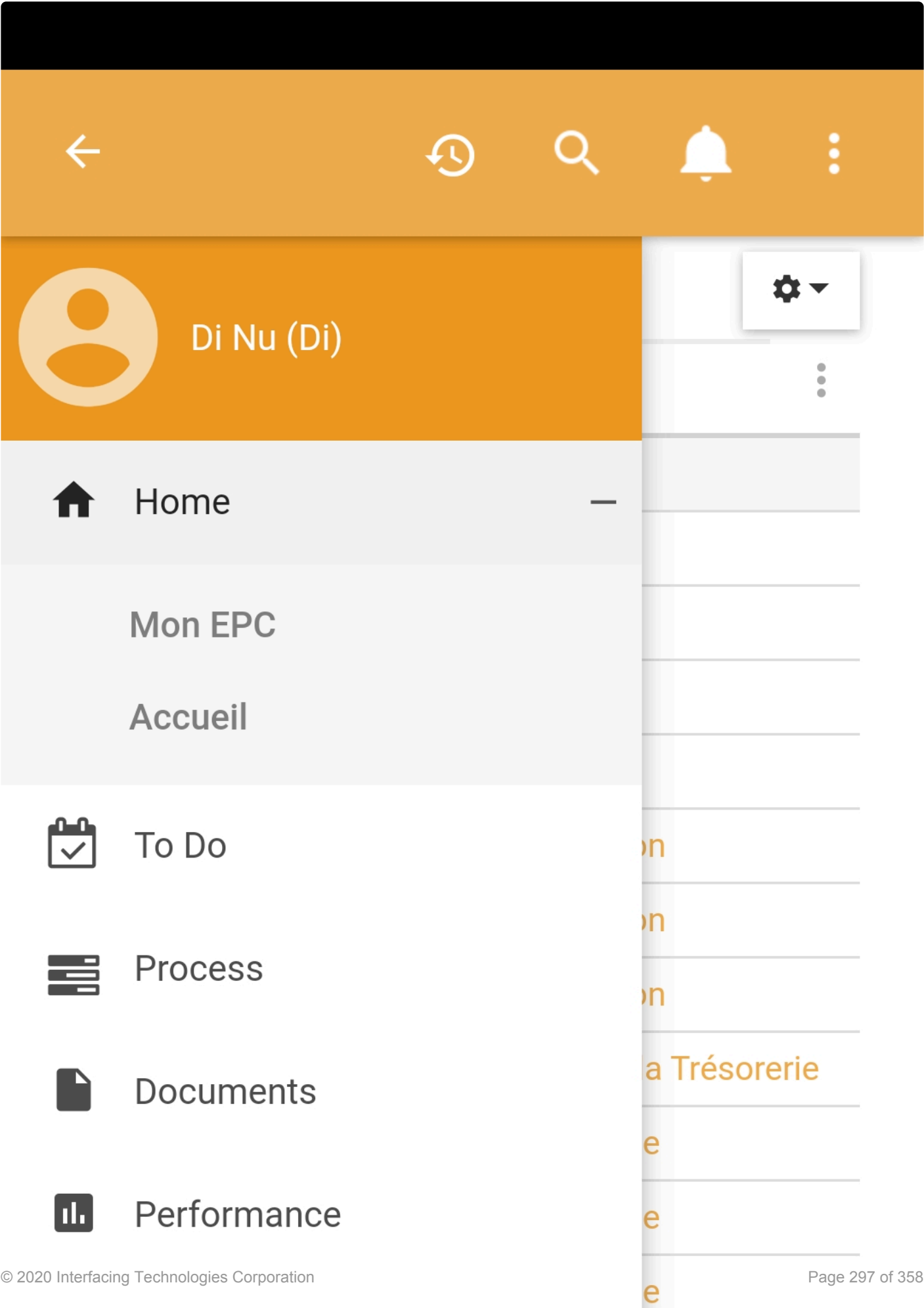
In EPC offline mobile app, when users are in their phone or tablet, users can save processes offline. Any sub-process is automatically saved too. As a result, users can see their processes and sub-processes offline whenever and at anytime.

## Customization

To facilitate the vision of the process graph, when users are in the offline option, then in GRAPH page the main focus is the process graph. there users can zoom in and zoom out.






## How it works


To set a process offline, users navigate to the three-lines icon on the top left of the page and select process module.





Then select the process they wish to see and use the arrows in the top right side to go to LIST page of the process.






 **FORMATION**




 OMP


+

 Problem Management


+

 Process Governance


+

 Process Modeling with Extensive Use of Ar...


+

 Process Modeling with Specific Tasks


+

 Process Modelling - with Linear Sequence ...


+

 Process Modelling with Branching and Mer...

+

 Process Modelling with events

-

 TC 10 Modelling with Timer Events- Drivii...

There, users can use the arrows in the right side of the screen to go back to the tree of the module. Also, they can navigate between GRAPH, DETAILS and LIST page

>>

LIST

GRAPH

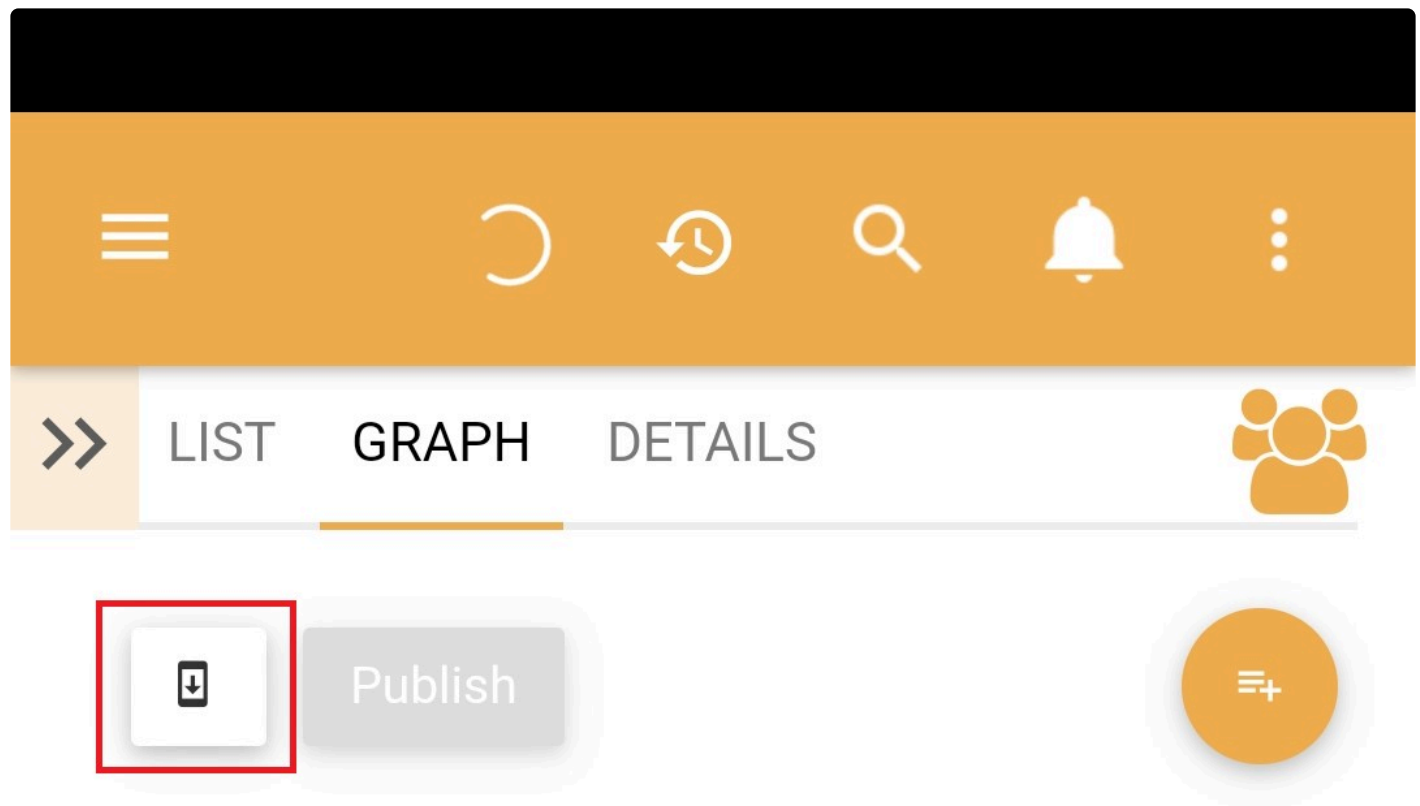
DETAILS

<div></div>	Type	Nar
<div><div></div><div></div></div>	Task	Ch
<div><div></div><div></div></div>	Task	Ch
<div><div></div><div></div></div>	Task	Col
<div><div></div><div></div></div>	End	eve
<div><div></div><div></div></div>	Start	eve
<div><div></div><div></div></div>	Process	Fas
<div><div></div><div></div></div>	Task	File
<div><div></div><div></div></div>	Gateway	gat
<div><div></div><div></div></div>	Gateway	gat

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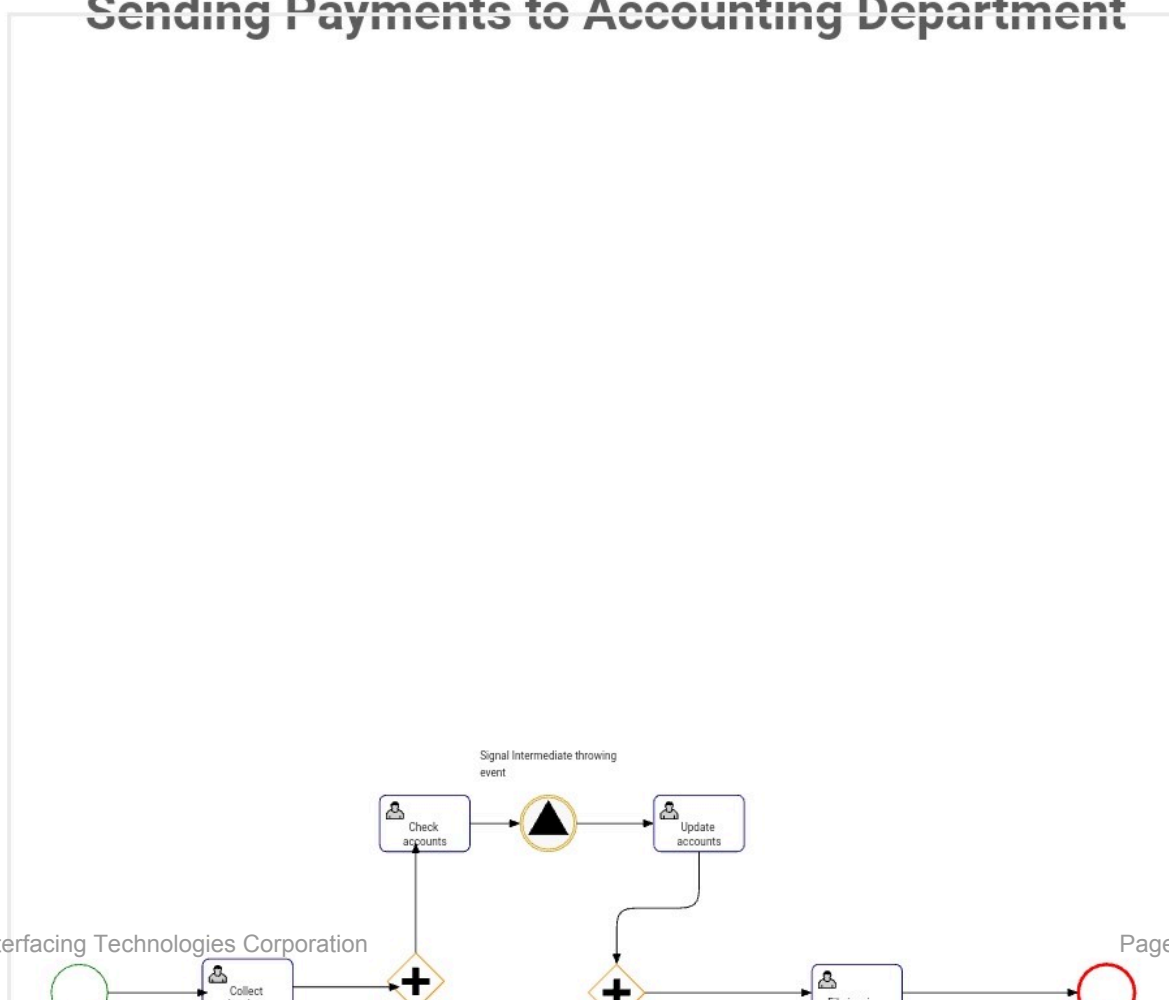
Page 301 of 358

In GRAPH page, in this tab, users can save locally the process to access it offline. Users have to click in the phone icon on the right side. then a confirmation message appears "Save locally" in green.

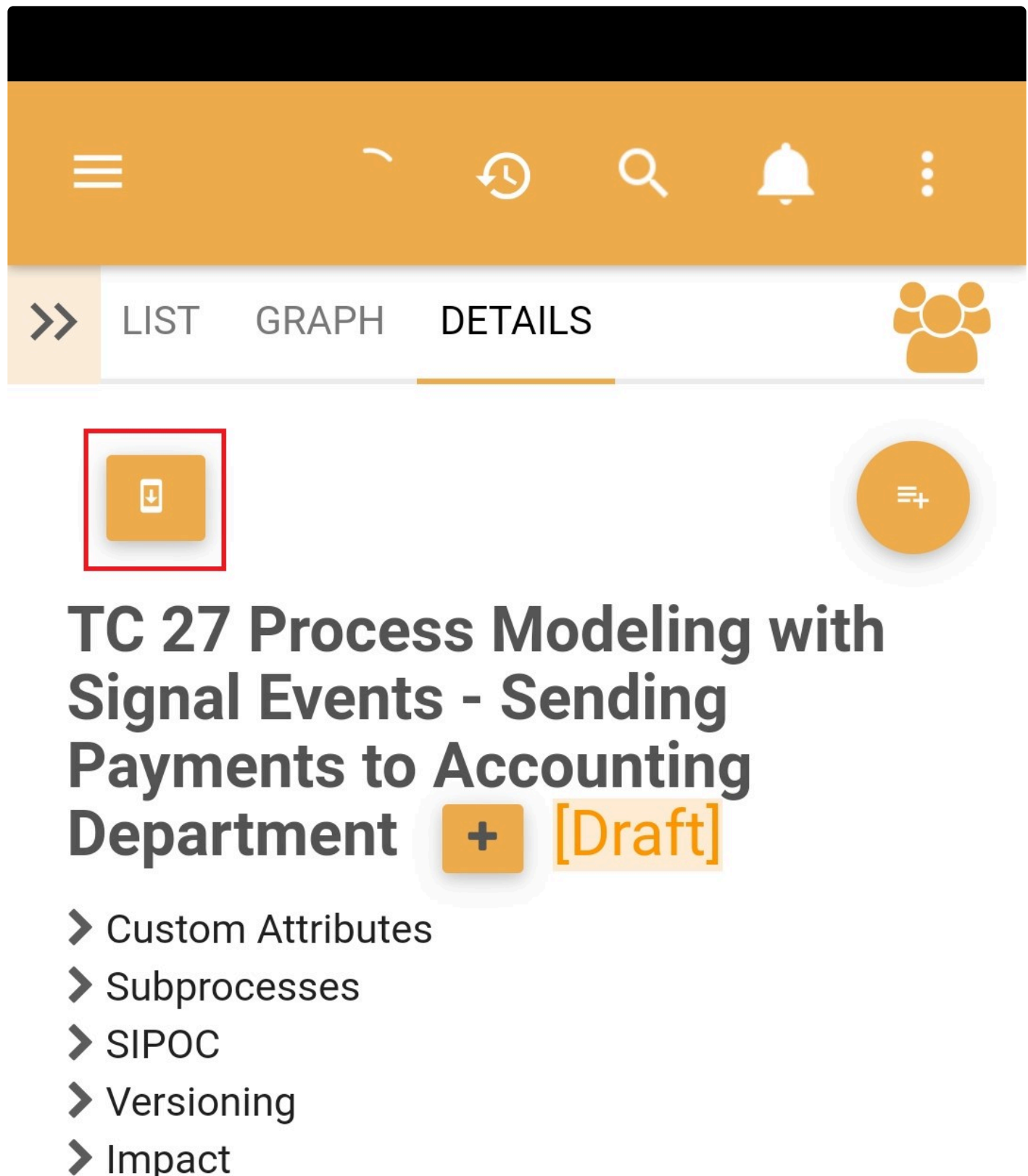


## TC 27 Process Modeling with Signal Events -

### Sending Payments to Accounting Department



They can also save the process locally from DETAILS page



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Menu icons: Hamburger menu, Undo, Refresh, Search, Bell, More options

Navigation tabs: >> LIST GRAPH **DETAILS** (selected)

Download icon (highlighted with a red box)

Group icon

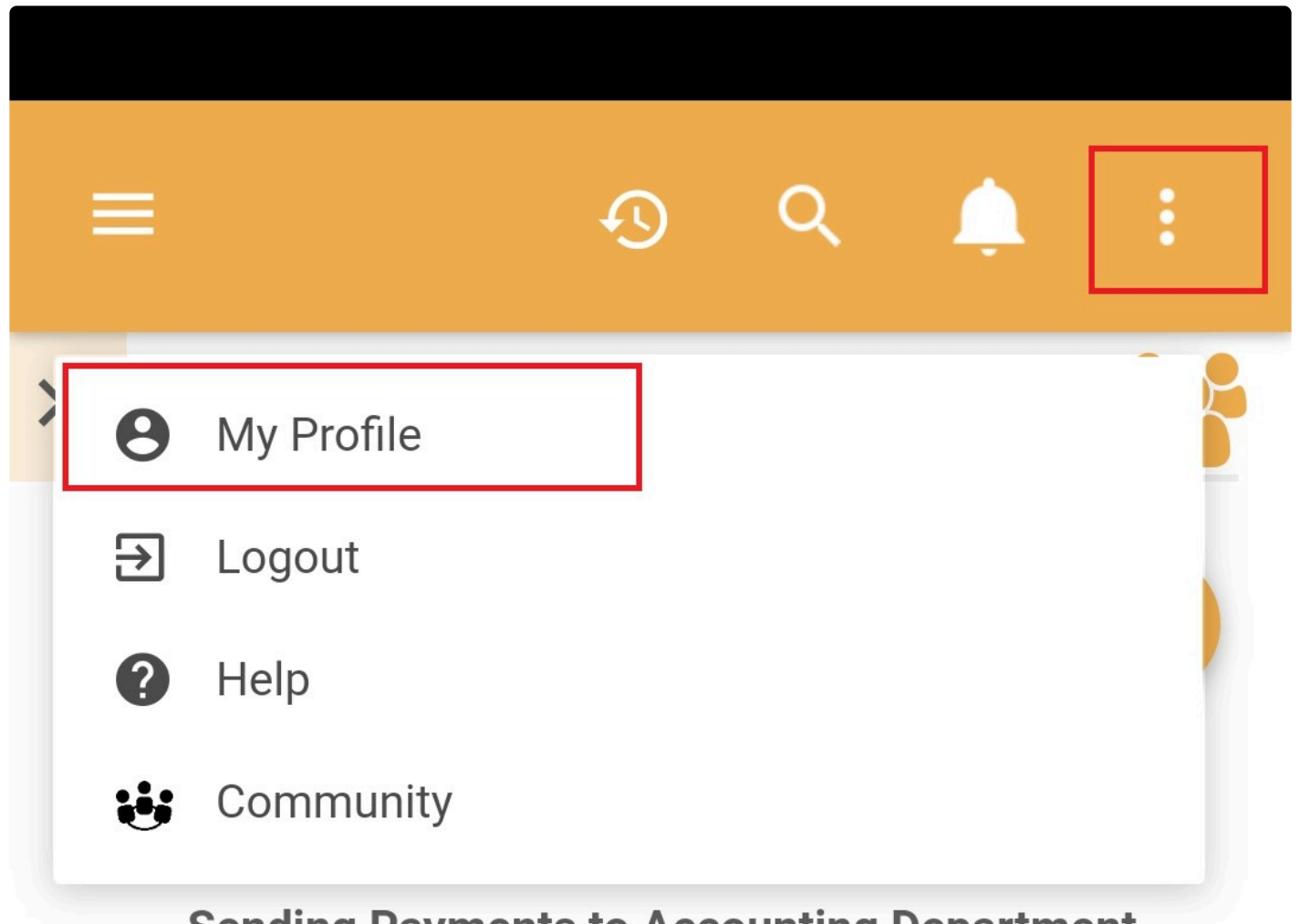
TC 27 Process Modeling with Signal Events - Sending Payments to Accounting Department

+ [Draft]

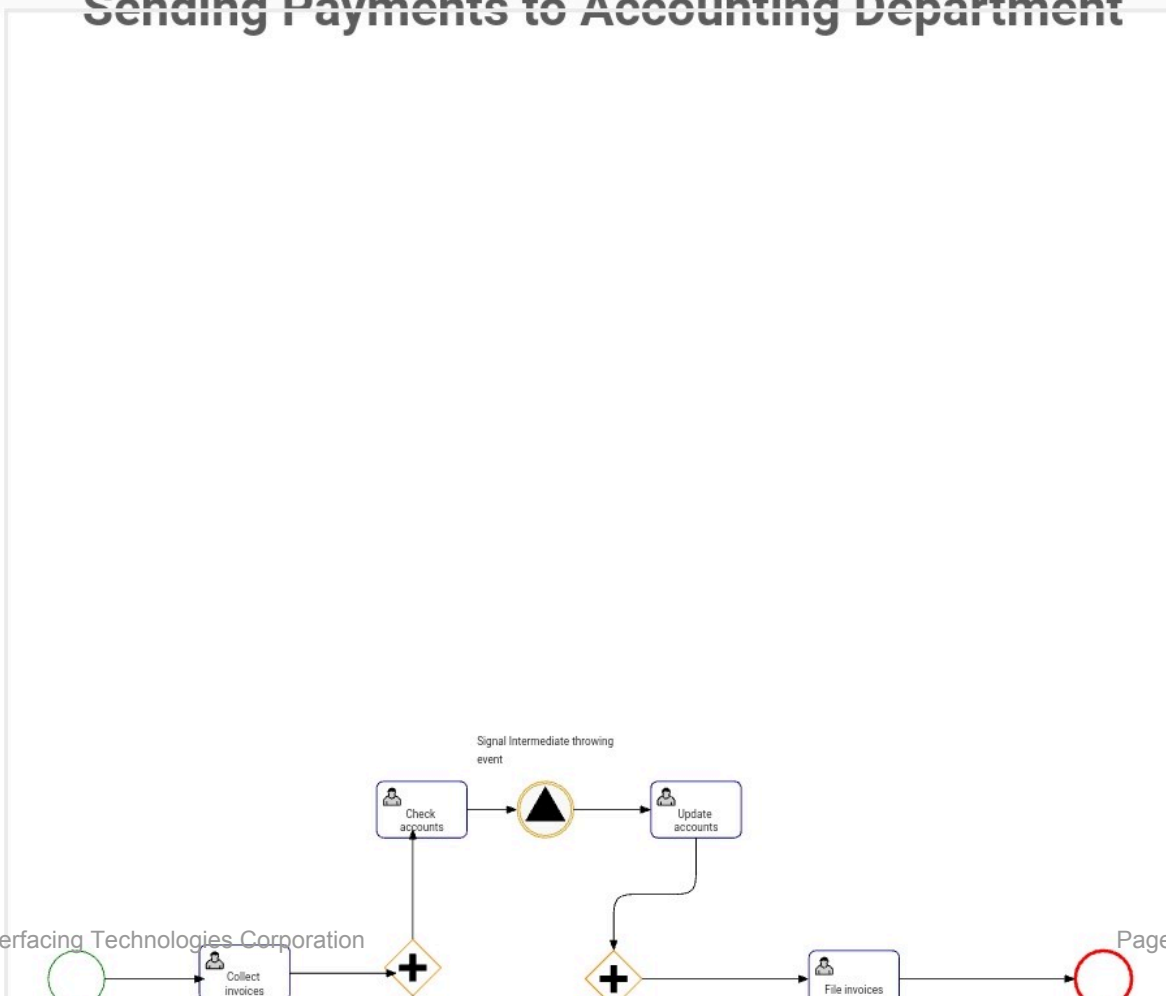
- > Custom Attributes
- > Subprocesses
- > SIPOC
- > Versioning
- > Impact

To set the app offline, users can go to their profile by clicking on the three-dots icon on the top right of the page.





## Sending Payments to Accounting Department



Once in the profile page, scroll down to the end of the page. there, users can select go offline



**SIGNATURE  
AVAILABLE**

## Authorizations



Administrator












Modeler Access



WebApp Access

EPC will stop using data or wi-fi and show all the processes and any sub process inside of them that have been saved locally. To go to the process, users can click on the name of the process and they will be redirected to the DETAILS page of their process offline.

5:16    •   30% 



  

>

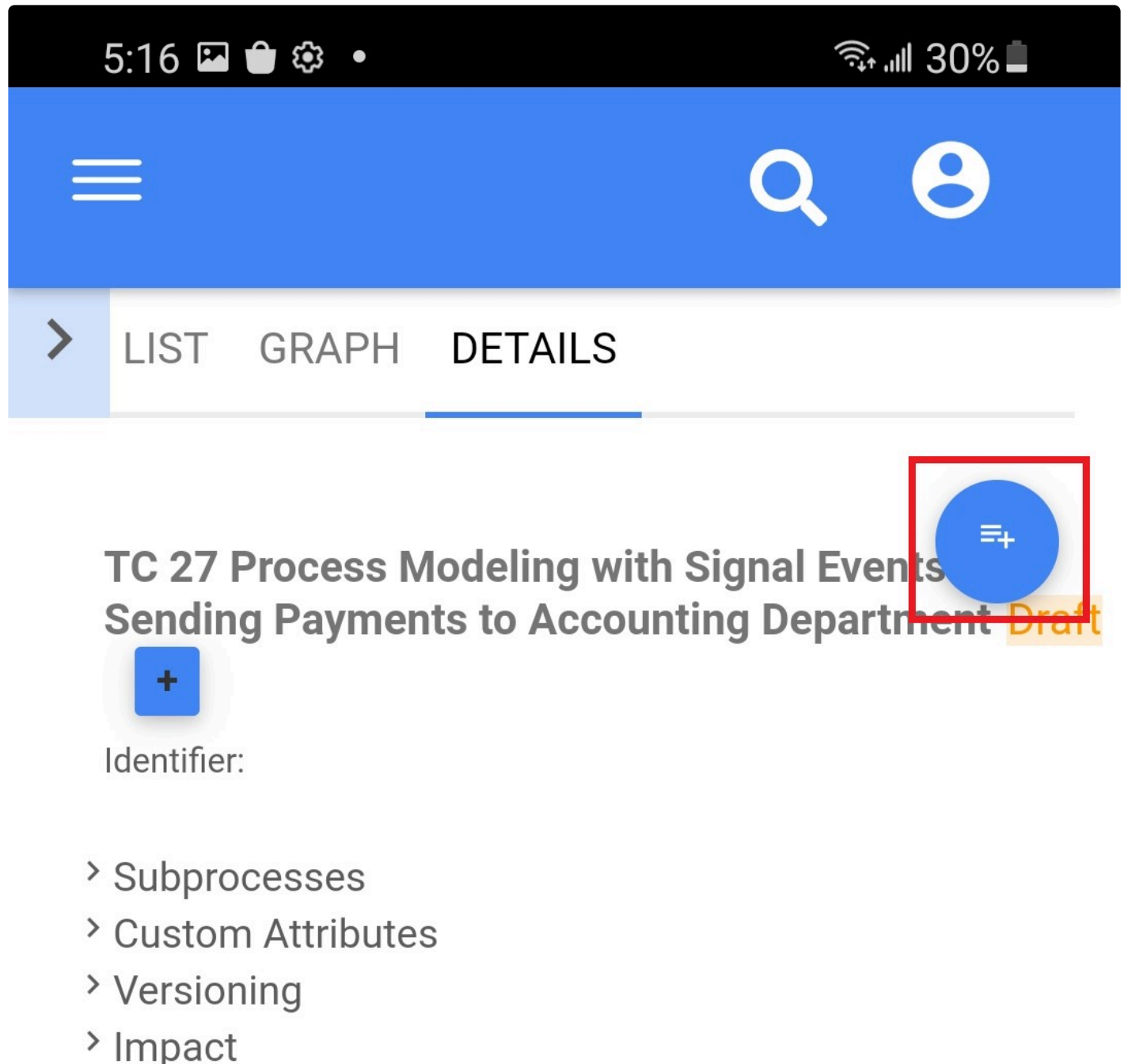
LIST

GRAPH

DETAILS

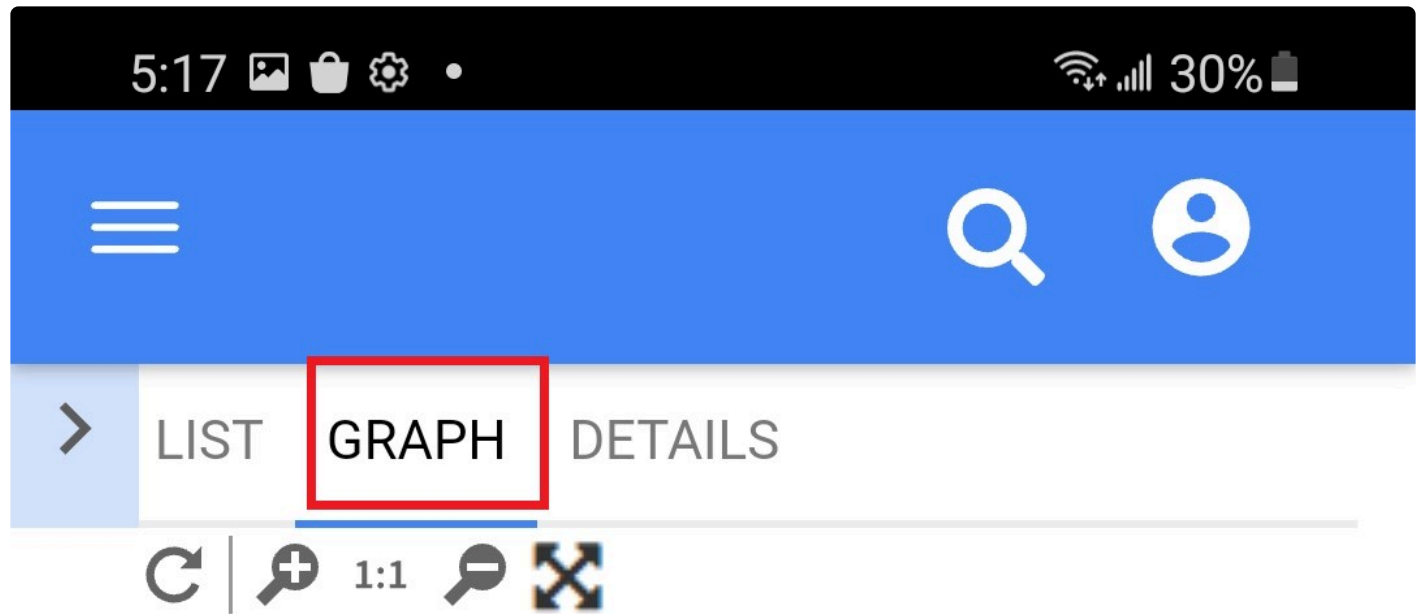
Type	Name	Docu
 Process	TC 27 Process Modeling with Sig...	
 Process	Fast Track Payments	

Once in detail page, users can see the details of the process and also have the option to unsaved the process locally. To do it, users have to simply expand the Button menu in the blue bubble and click on the phone icon



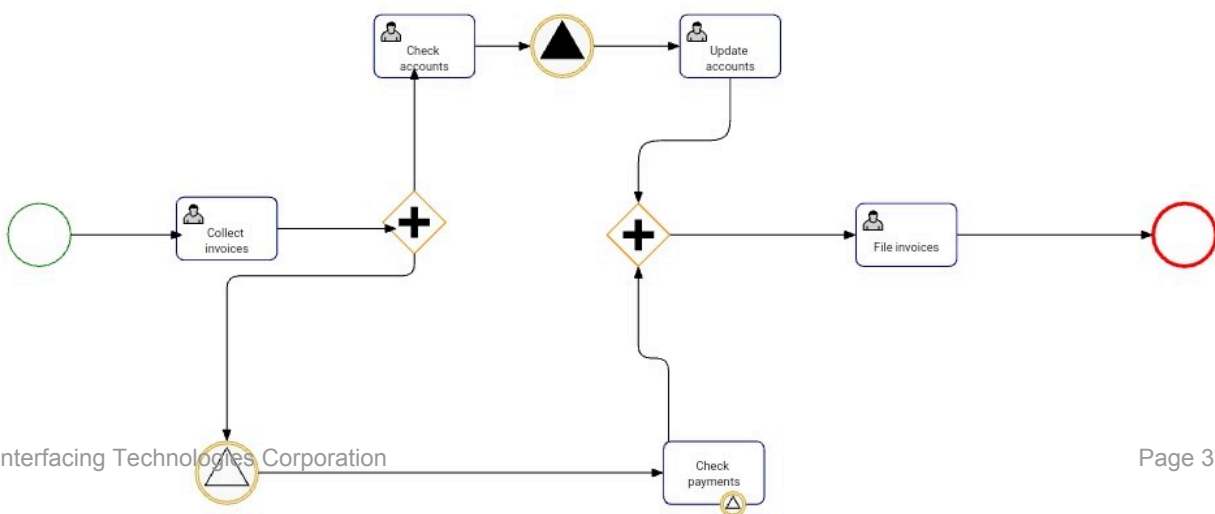
In the GRAPH page, the user sees the offline graph that they saved.





## TC 27 Process Modeling with Signal Events - Sending Payments to

### Accounting Department





# List Page Offline

## Functionality

In EPC offline mobile app, users can go to EPC and view the list page of any module in the EPC offline mobile app

## Customization

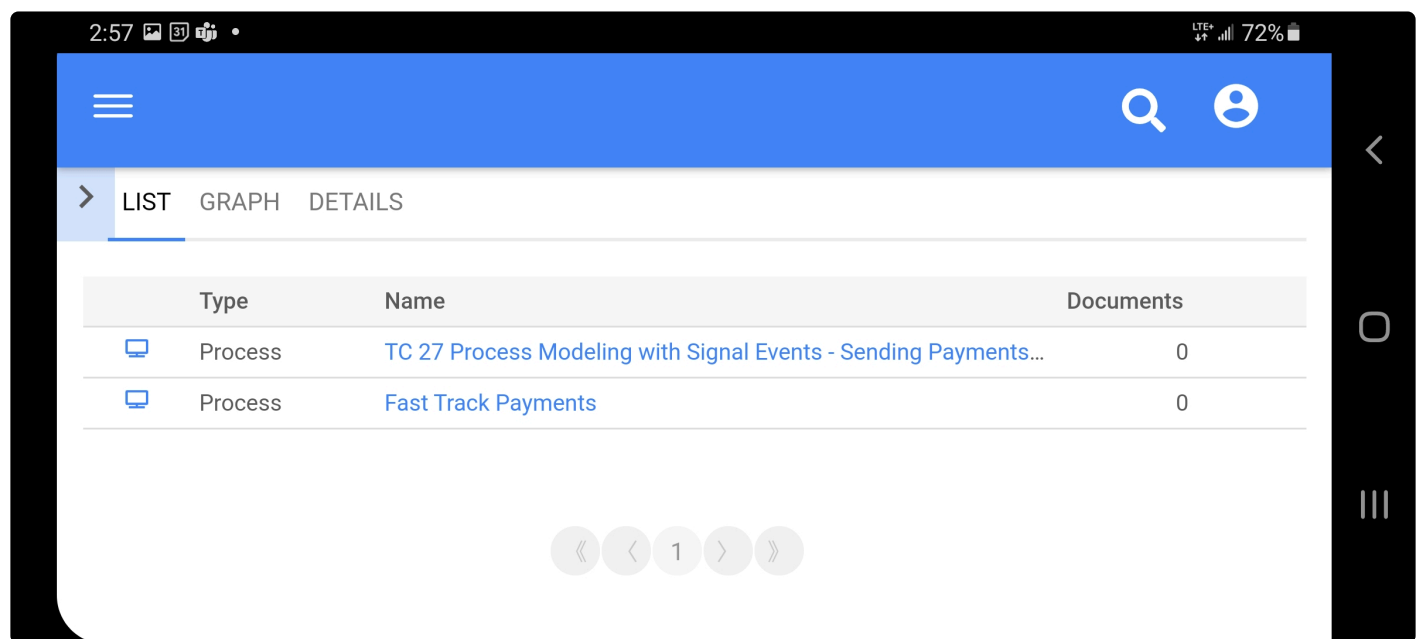
Users can order the columns in ascendant and descendent form.

## How it works

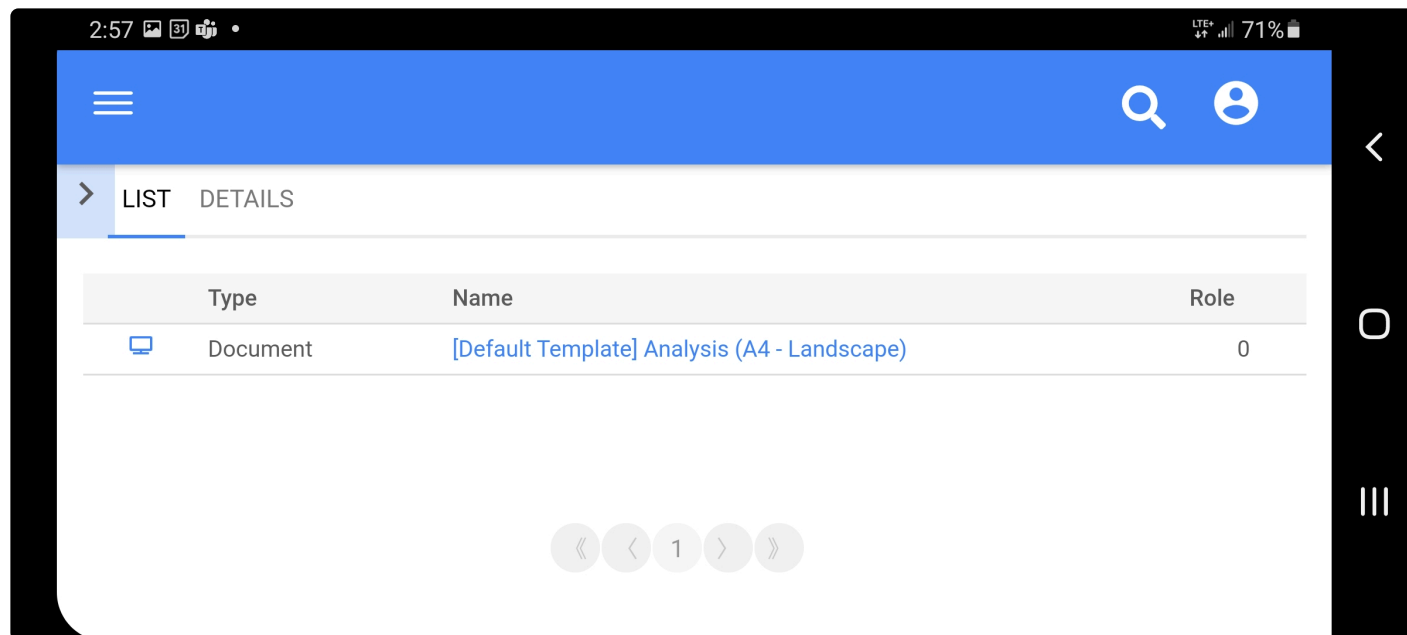
Users can simply select the module from the menu of modules, then they will be redirected to the LIST page of the respective modules.

Each module will display the objects that have been save in the Online EPC mobile app.

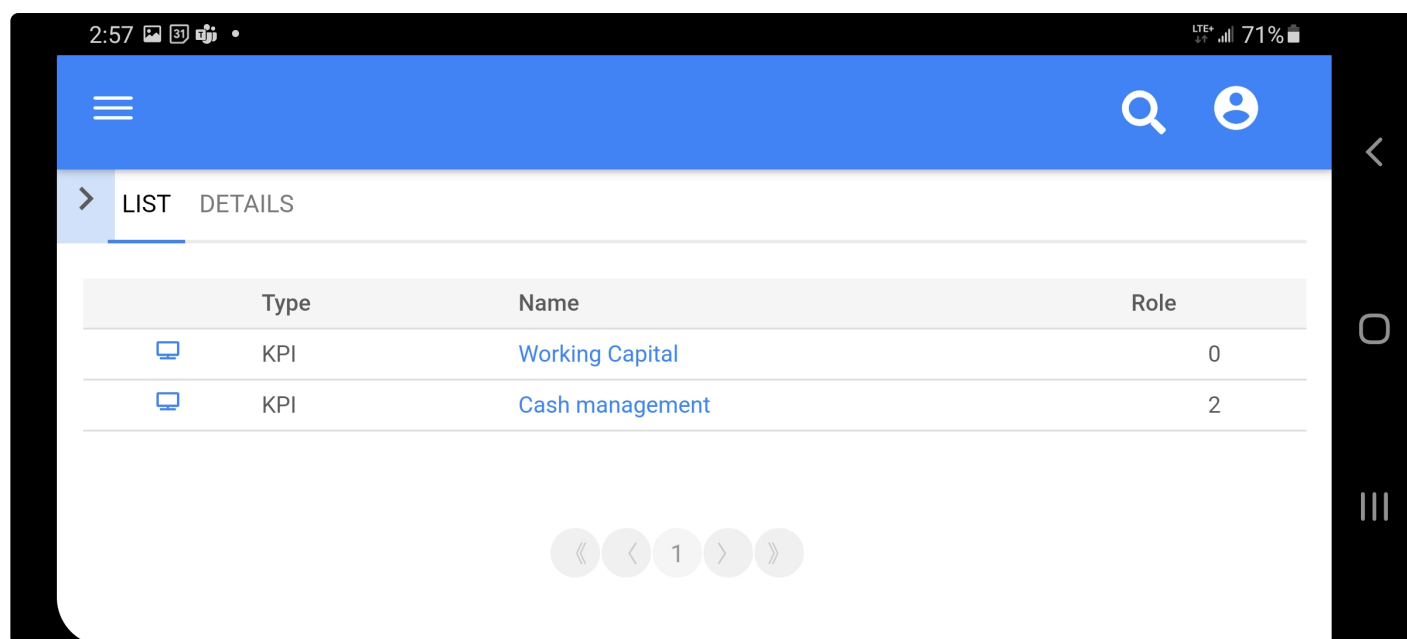
Process Module



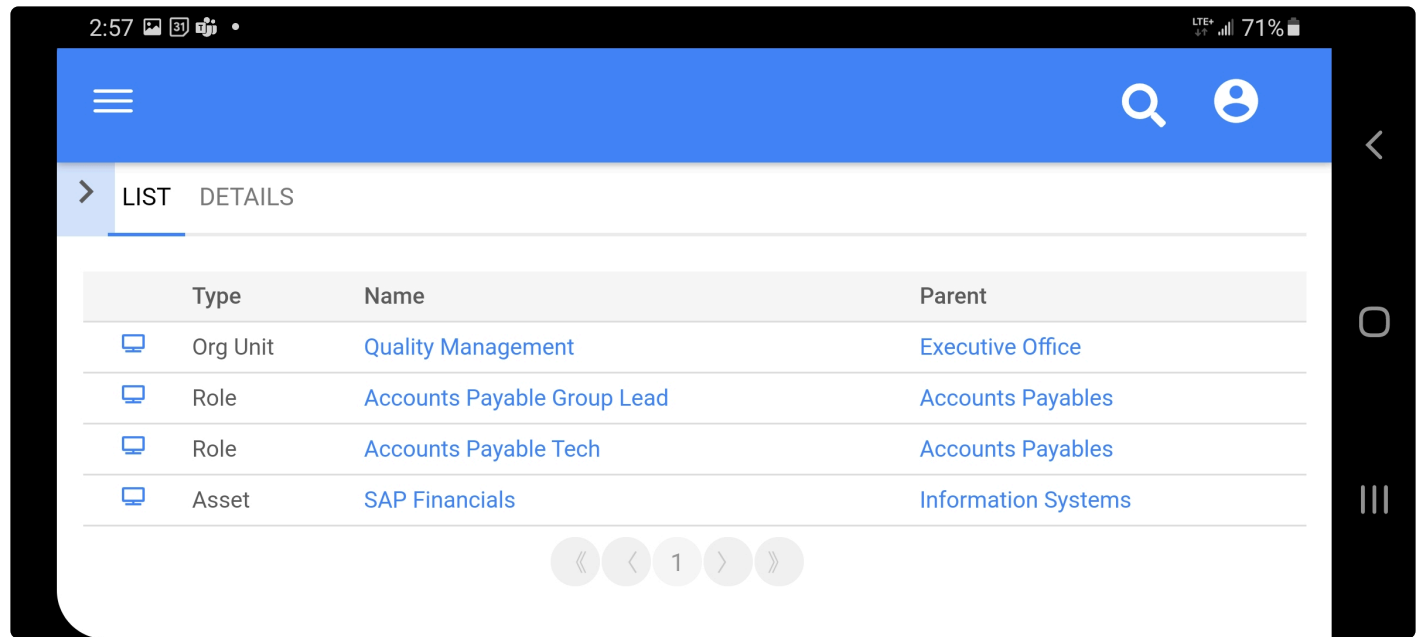
Document Module



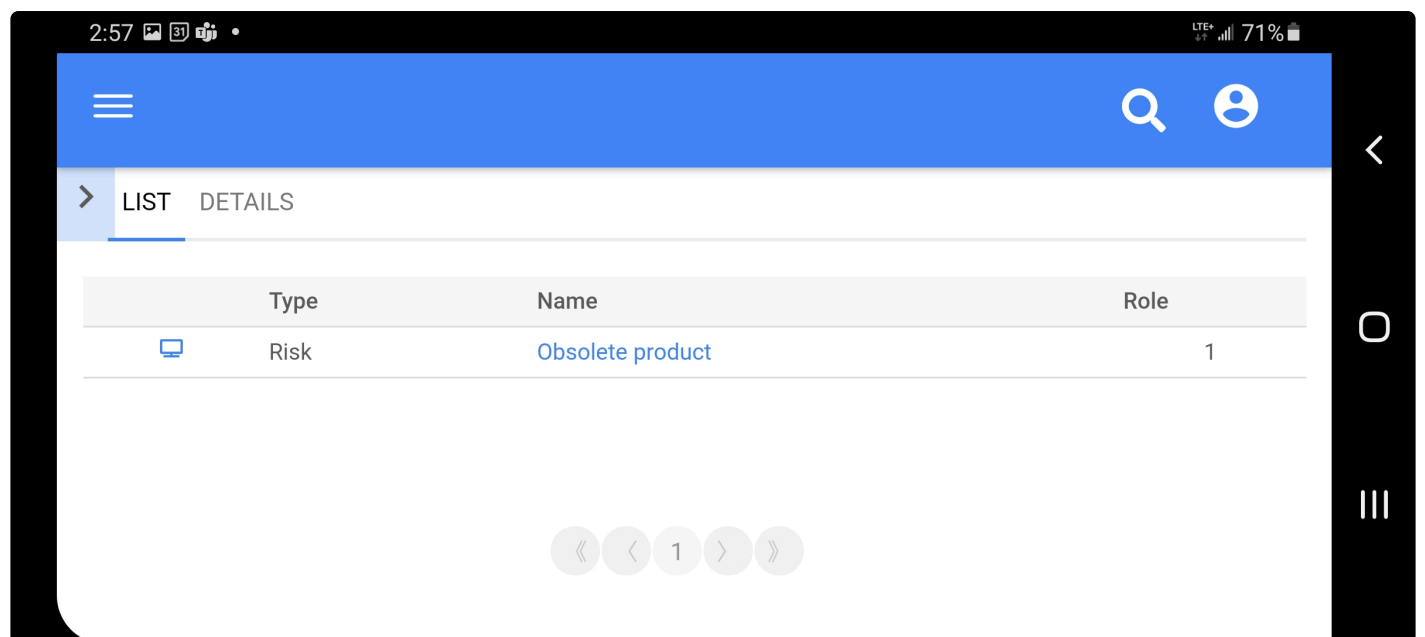
### Performance Module



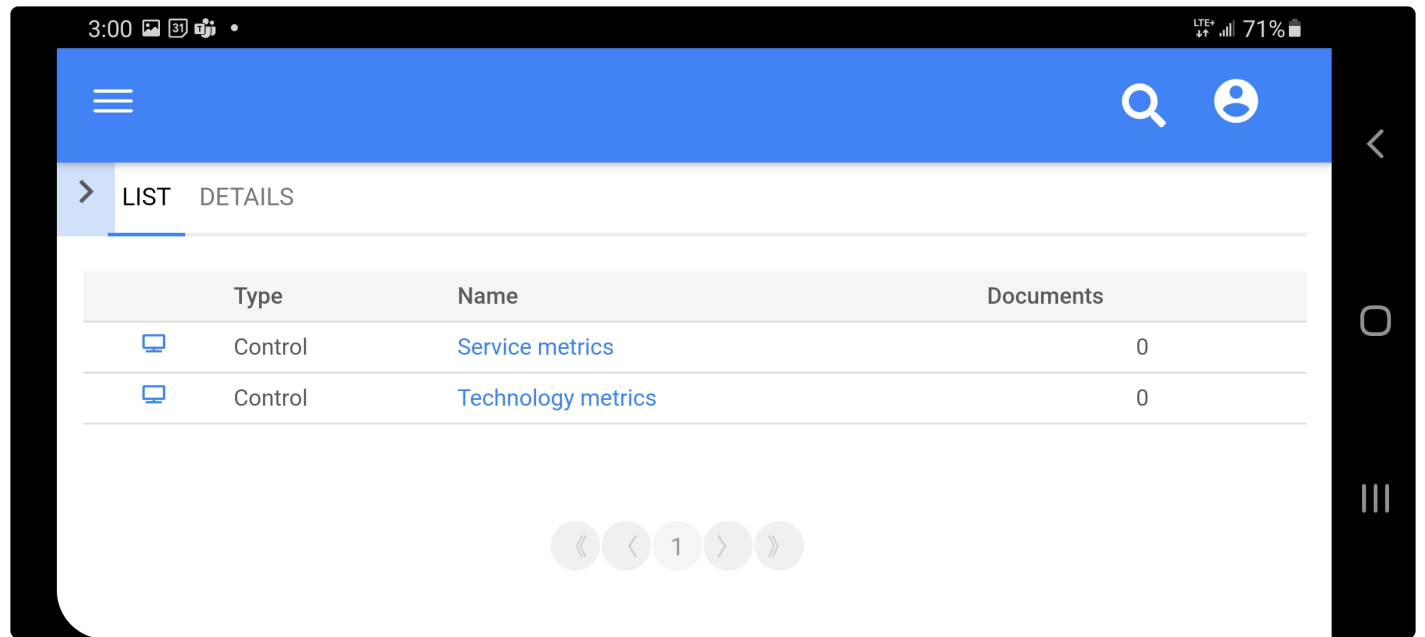
### Organization Module



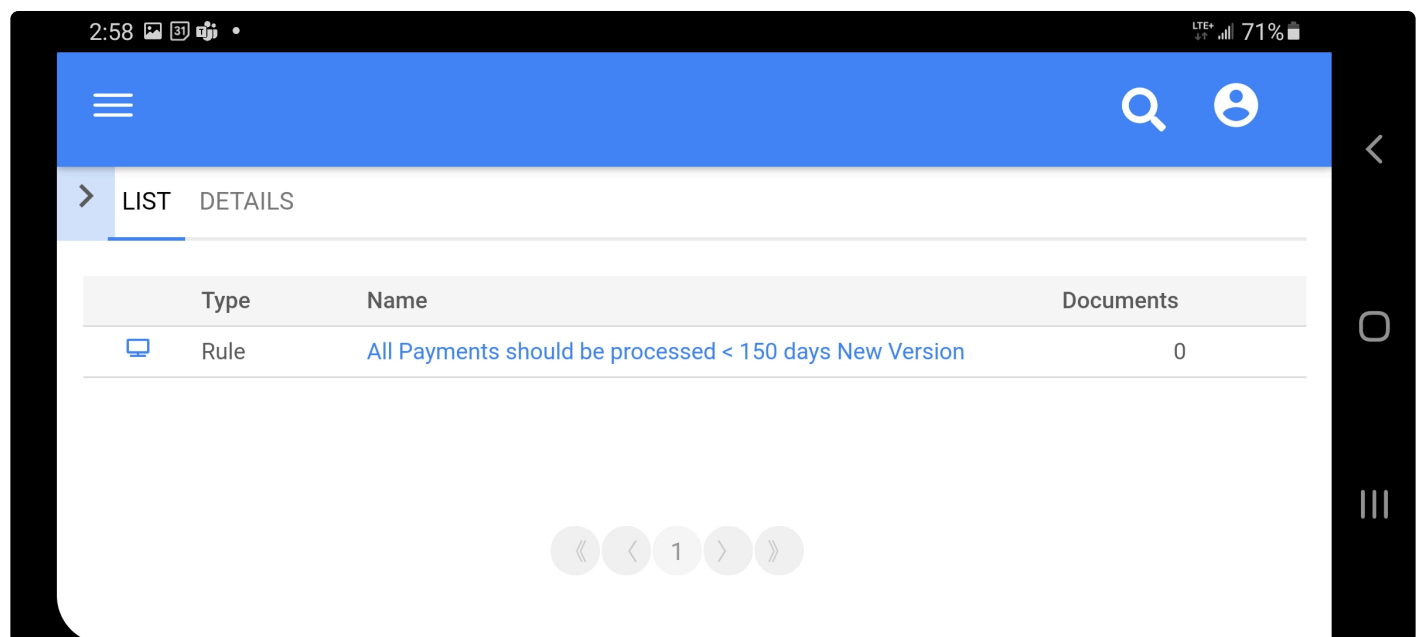
## Risk Module



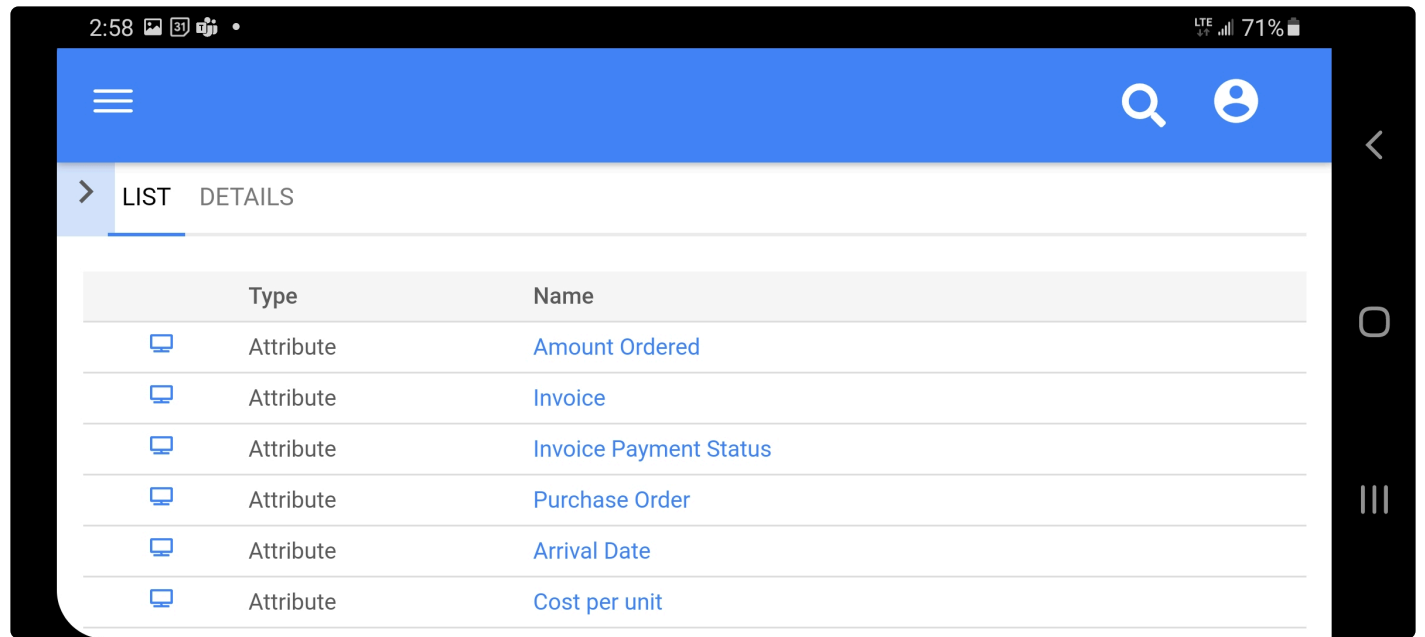
## Control Module









## Rule Module



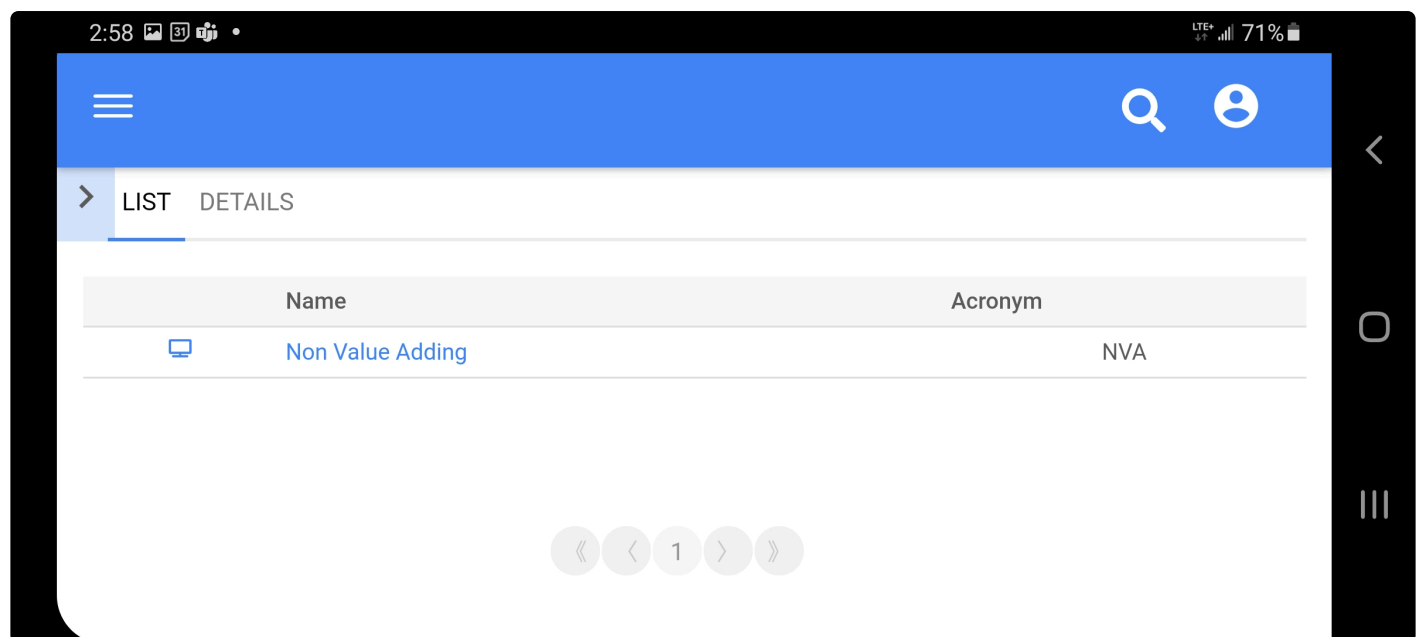
## Master Data Module




The screenshot shows a mobile application interface with a blue header bar containing a menu icon, a search icon, and a user profile icon. Below the header, there are tabs for 'LIST' and 'DETAILS'. The 'LIST' tab is active, displaying a table with two columns: 'Type' and 'Name'. The table lists six attributes, each with a computer icon in the 'Type' column and a blue link in the 'Name' column. The status bar at the top shows the time as 2:58, LTE+ signal, and 71% battery.

Type	Name
	<a href="#">Amount Ordered</a>
	<a href="#">Invoice</a>
	<a href="#">Invoice Payment Status</a>
	<a href="#">Purchase Order</a>
	<a href="#">Arrival Date</a>
	<a href="#">Cost per unit</a>

## Glossary Module



The screenshot shows the same mobile application interface as above, but now displaying a single glossary entry. The table has two columns: 'Name' and 'Acronym'. The entry is 'Non Value Adding' with the acronym 'NVA'. Below the table, there are five circular navigation buttons: a double left arrow, a single left arrow, the number '1', a single right arrow, and a double right arrow. The status bar at the top shows the time as 2:58, LTE+ signal, and 71% battery.

Name	Acronym
 <a href="#">Non Value Adding</a>	NVA

« ‹ 1 › »

# Details Page Offline

---

## Functionality

In EPC offline mobile app, users can see the details of the objects that have been saved locally.

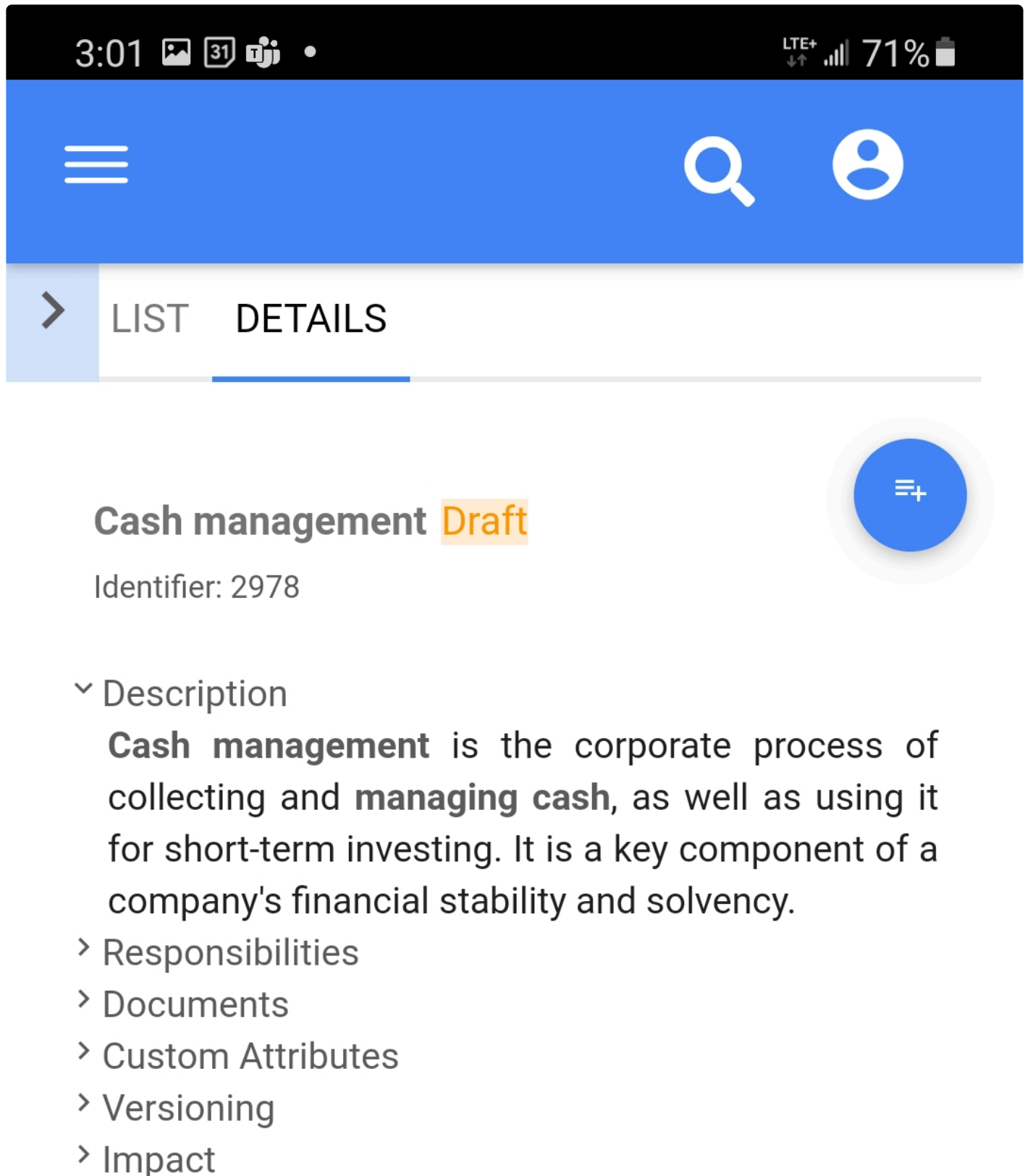
## Customization

Information in DETAILS page:

- Capability name, Unique Identifier , Description field
- Responsibilities
- Associations if they have been defined with – Processes – Document – Performance – Rules – Regulations & Policies – Risks – Controls.
- Custom Attributes
- Analysis
- Versioning details
- Impact details



## How it works





# Offline Search





---

## Functionality

In EPC offline mobile App, users can search for objects based on their name, this allows users to easily find what they are looking for.

## How it works

Users can click in the search icon on top of the page, there start writing a word that is part of the name of the object and the option will appear under.

3:02    •LTE+  70% 

## Modeling

### **[PROCESS] TC 27 Process Modeling with Signal Events - Sending Payments to Accounting Department**



## Modeling





# AI Document Process Mining Parser (Gen2)

---

The new Parser Application will allow users to simplify the digital transformation of moving from file based documentation to reusable data fragment management. The AI based Document Process Mining Parser analyzes the text within your files and automatically discovers your processes, regulations, systems, roles / responsibilities, terms, acronyms and other related business entities. This module is a licensed option.

The Parser User Manual will cover the following:

- [Upload a document](#)
- [Template selection/creation](#)
- [Parsing a Document](#)
- [Rule Builder](#)
- [Export](#)

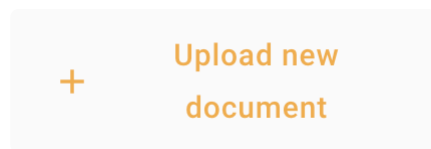
# Upload a document

## Functionality

To use Parser, users upload the document that will be parsed and exported to EPC.

## How it works

1. To start parsing a document, users have to upload it first. This action is possible by clicking on the “ + Upload new document” button.



After clicking, an upload pop up will appear to select the document to Parse. Only one document at the time can be parsed. Multiple document parsing is not supported yet by the Parser.

 Only Word type documents are supported at the moment.

2. Once the document is uploaded, user will make sure they downloaded the right one, and then select it.

Name	File Type	Date Created ↓	Date Parsed
<input type="checkbox"/> Parser_Help_Files.docx	docx	2021-08-12	2021-08-12

3. When the document is selected, user will click on the “Next” button to navigate to the following step :  
Template selection/creation



# Template selection/creation

---

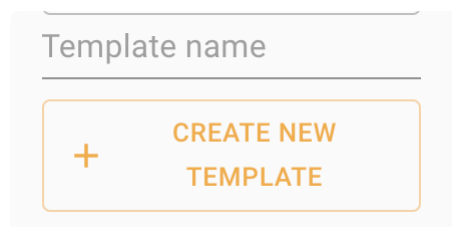
## Functionality

IN EPC Parser, users can create their own template based on their document standards with the goal to save time in the future document to parse.

### How it works

User can create templates in Parser by clicking on “Create Template”

Once there, users will be asked to select (if existing) a template or to create one if no template is selected.

A screenshot of a web interface showing a text input field labeled 'Template name'. Below the input field is a button with an orange border and text. The button contains a plus sign icon followed by the text 'CREATE NEW TEMPLATE' in orange capital letters.

If users decide to **create a template**, he will be asked to name it to be able to advance to the next step.

The template will be created based on the document tagging.

If user decides to use an **existing template** the template will automatically applied on the following step. The tagging will be based on the previously created template.

### Delete a template

In this step users can find any template that is saved in the environment. Users can also delete a template if needed by clicking *Delete Template*

# Parsing a Document

---

## Functionality

In Parser, users are able to tag a document. By doing that, they can create/edit a template.

## How it works

After selecting a document and template, users will be redirected to the Parsing page.

Users who selected to create a new template will have to start tagging the document from the start.

Users with an existing template will see it applied to the document and can still make edits if needed before the export.

These are the main possible actions while parsing a document :

- [Manual Tagging](#)
- [Auto Tagging](#)
- [Rule Selection](#)
- [Parsing Feature](#)

# Manual – Tagging Data

## Functionality

The manual tagging is an important step while creating or editing a template : it will define how the objects will be treated in the next parsing while using the newly crafted template.

## How it works

To tag the document

### 1. Select the text that needs to be tagged

#### 4.7 Notification of potential critical observation:

*Lead Auditor*

The Lead Auditor must immediately (within 24 hours starting from identification of any potential critical observations identified during the audit. This observation(s) and an overview of why observation(s) is rated as provided audit record in AQWA A.

### 2. Once selected, a contextual menu will appear on the screen

#### 4.7 Notification of potential critical observation:

*Lead Auditor*

The Lead Auditor must immediately (within 24 hours starting from identification of any potential critical observations identified during the audit. This observation(s) and an overview of why observation(s) is rated as provided audit record in AQWA A.

#### 4.7.1 Data Integrity Impact:

*Lead Auditor*

The Lead Auditor ticks the box in AQWA A when an observation is Contemporaneous, Original, Accurate, Complete, Available, Consistent description field to identify which of the principles the observation is violating.

#### 4.8 Audit reporting:

*Lead Auditor*

#### Managerial assertion completeness

*Key/ Critical Control Information*

The Lead Auditor is responsible for completing, obtaining approval and completing the audit for audits executed by Auditors or within forty performance metrics take into account the timelines of the issues. Auditor/Administrative Lead Auditor to submit the report within 25 days respectively 40 days for audits executed by Third Parties to allow at least 5 days for report review and approval. Audit reports are issued in English. Audit Reports are done using Cognos.

- Process ▶
- Organization ▶
- Performance ▶
- Rule ▶
- Risk ▶
- Control ▶
- Document ▶
- Master data ▶
- Glossary ▶
- Capability ▶

### 3. Select the the type and level of the object tagging

#### 4.7 Notification of potential critical observation:

*Lead Auditor*

The Lead Auditor must immediately (within 24 hours starting from identification of any potential critical observations identified during the audit. This observation(s) and an overview of why observation(s) is rated as provided audit record in AQWA A.

#### 4.7.1 Data Integrity Impact:

*Lead Auditor*

The Lead Auditor ticks the box in AQWA A when an observation is Contemporaneous, Original, Accurate, Complete, Available, Consistent description field to identify which of the principles the observation is violating.

#### 4.8 Audit reporting:

*Lead Auditor*

#### Managerial assertion completeness

*Key/ Critical Control Information*

The Lead Auditor is responsible for completing, obtaining approval and completing the audit for audits executed by Auditors or within forty performance metrics take into account the timelines of the issues. Auditor/Administrative Lead Auditor to submit the report within 25 days respectively 40 days for audits executed by Third Parties to allow at least 5 days for report review and approval. Audit reports are issued in English. Audit Reports are done using Cognos.

- Process ▶
- Organization ▶
- Performance ▶
- Rule ▶
- Risk ▶
- Control ▶
  - Control Set ▶
  - Control Folder ▶
  - Control ▶
- Document ▶
- Master data ▶
- Glossary ▶
- Capability ▶

- Name
- Description
- Reference Number
- Attributes ▶

Tagged objects



#### 4.7 Notification of potential critical observation:

*Lead Auditor*

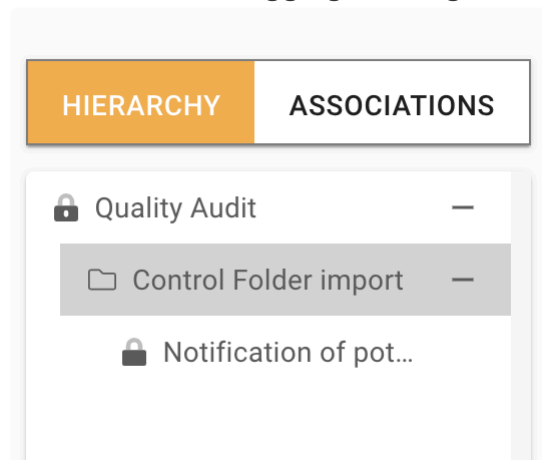
The Lead Auditor must immediately (within 24 hours starting from identification) notify by e mail the respective Audit Head or delegate of any potential critical observations identified during the audit. This email should contain a brief description of the potential critical observation(s) and an overview of why observation(s) is rated as provisionally critical. The communication needs to be attached to the audit record in AQWAA.

##### 4.7.1 Data Integrity Impact:



When creating a new template, it's important to tag correctly the first document. The template creation and tagging might take some time depending on the complexity of the document – this steps will define the accuracy of the template for future parsings.

**Parser will automatically link the objects from the same type. The hierarchy and associations can be validated as the tagging is being made, on the left of the screen.**



If user doesn't select a set name, a default object set will be created for the child object that had been tagged

## 4. Table tagging

**When user need to tag a table in the Parser, two options are available:**

Description	Assigned Roles & Document Reference
<b>6.4.1 Review and comment</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> start review process in LifeDoc in case of ADVANCE review for correctness and feasibility check</li> <li><input type="checkbox"/> stop review workflow in LifeDoc</li> </ul>	PM GSOP 103
<b>6.4.2 Evaluate comments out of review</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> evaluate comments out of review according to regulatory requirements, operational feasibility, aspect of standardization, timelines of revision</li> <li><input type="checkbox"/> incorporate results from evaluation into the document</li> <li><input type="checkbox"/> send document to BO for finalization</li> </ul> <b>Remarks</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> if necessary, the PM contacts the DT for final evaluation of comments</li> </ul>	PM DT
<b>6.4.3 Finalize document</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> check the document for completeness and consistency</li> <li><input type="checkbox"/> prepare document for approval</li> <li><input type="checkbox"/> design BPM flows according to final document draft</li> </ul>	BO

By clicking on on the “ + “ two options will appear

Description	Assigned Roles & Document Reference
<b>6.4.1 Review and comment</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> start review process in LifeDoc in case of ADVANCE review for correctness and feasibility check</li> <li><input type="checkbox"/> stop review workflow in LifeDoc</li> </ul>	PM GSOP 103
<b>6.4.2 Evaluate comments out of review</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> evaluate comments out of review according to regulatory requirements, operational feasibility, aspect of standardization, timelines of revision</li> <li><input type="checkbox"/> incorporate results from evaluation into the document</li> <li><input type="checkbox"/> send document to BO for finalization</li> </ul> <b>Remarks</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> if necessary, the PM contacts the DT for final evaluation of comments</li> </ul>	PM DT
<b>6.4.3 Finalize document</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> check the document for completeness and consistency</li> <li><input type="checkbox"/> prepare document for approval</li> <li><input type="checkbox"/> design BPM flows according to final document draft</li> </ul>	BO

- Entire Table : will allow user to tag the whole table as an object that can be found later in rich text in EPC data

Description	Assigned Roles & Document Reference
<b>6.4.1 Review and comment</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> start review process in LifeDoc in case of ADVANCE review for correctness and feasibility check</li> <li><input type="checkbox"/> stop review workflow in LifeDoc</li> </ul>	PM GSOP 103
<b>6.4.2 Evaluate comments out of review</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> evaluate comments out of review according to regulatory requirements, operational feasibility, aspect of standardization, timelines of revision</li> <li><input type="checkbox"/> incorporate results from evaluation into the document</li> <li><input type="checkbox"/> send document to BO for finalization</li> </ul> <b>Remarks</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> if necessary, the PM contacts the DT for final evaluation of comments</li> </ul>	PM DT
<b>6.4.3 Finalize document</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> check the document for completeness and consistency</li> <li><input type="checkbox"/> prepare document for approval</li> <li><input type="checkbox"/> design BPM flows according to final document draft</li> </ul>	BO

- Select header : will allow the user to define what type of header is the table “ Columns header or Rows Header”.

Description	Assigned Roles & Document Reference
<b>6.4.1 Review and comment</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> start review process in LifeDoc in case of ADVANCE review for correctness and feasibility check</li> <li><input type="checkbox"/> stop review workflow in LifeDoc</li> </ul>	PM GSOP 103
<b>6.4.2 Evaluate comments out of review</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> evaluate comments out of review according to regulatory requirements, operational feasibility, aspect of standardization, timelines of revision</li> <li><input type="checkbox"/> incorporate results from evaluation into the document</li> <li><input type="checkbox"/> send document to BO for finalization</li> </ul> <b>Remarks</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> if necessary, the PM contacts the DT for final evaluation of comments</li> </ul>	PM DT
<b>6.4.3 Finalize document</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> check the document for completeness and consistency</li> <li><input type="checkbox"/> prepare document for approval</li> <li><input type="checkbox"/> design BPM flows according to final document draft</li> </ul>	BO

Once this first step is done, user will tag cells as individual objects.

Description	Assigned Roles & Document Reference
<b>6.4.1 Review and comment</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> start review process in LifeDoc in case of ADVANCE review for correctness and feasibility check</li> <li><input type="checkbox"/> stop review workflow in LifeDoc</li> </ul>	PM GSOP 103
<b>6.4.2 Evaluate comments out of review</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> evaluate comments out of review according to regulatory requirements, operational feasibility, aspect of standardization, timelines of revision</li> <li><input type="checkbox"/> incorporate results from evaluation into the document</li> <li><input type="checkbox"/> send document to BO for finalization</li> </ul> <b>Remarks</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> if necessary, the PM contacts the DT for final evaluation of comments</li> </ul>	PM DT
<b>6.4.3 Finalize document</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> check the document for completeness and consistency</li> <li><input type="checkbox"/> prepare document for approval</li> <li><input type="checkbox"/> design BPM flows according to final document draft</li> </ul>	BO

When the table tagging is completed, when parsed, all the tables with the same structure will be tagged accordingly to the initial tagging.

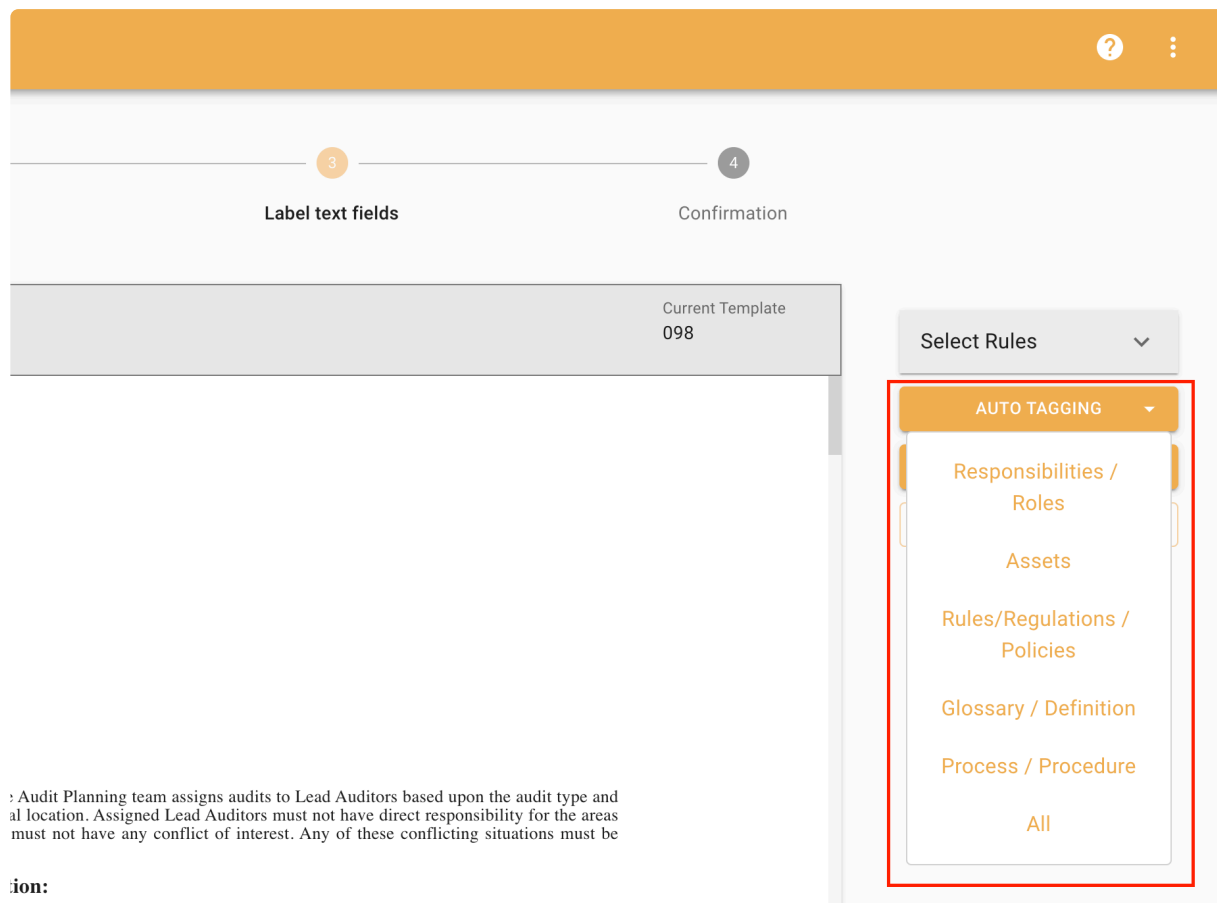
# Auto Tagging

## Functionality

User can use the Auto Tagging feature where the Parser will automatically identify data to be tagged.

## Customization

By default, the Parser is able to detect generic Responsibilities, Roles and Assets – if the feature is used without any custom entry



### Custom List – Auto Tags

Users can predefine a list of tags that are used in the documents.

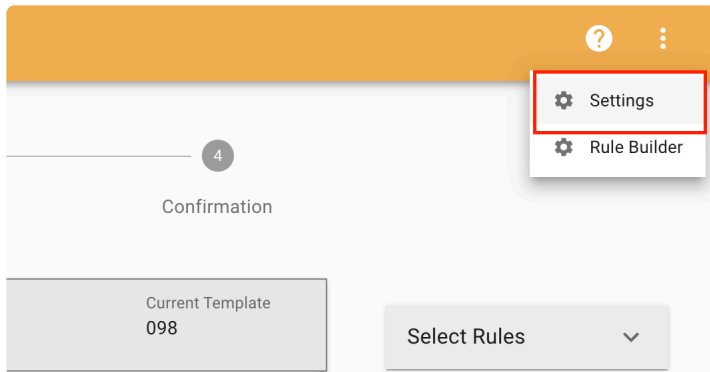
## How it works

To set up the list of the Auto Tag feature :



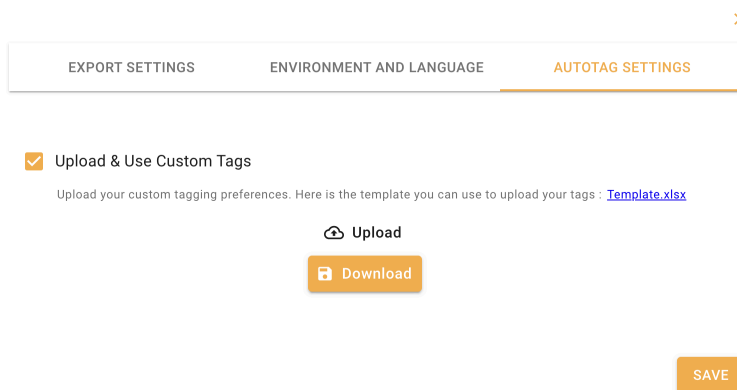
## 1. Go to Settings

On the top right of the screen users can find the settings window



## 2. Select Auto Tag Settings and check “*Upload & Use Custom Tags*”

When checking the option, the Parser will use the uploaded document with the custom tags for the Auto tags



## 3. Download Auto Tag template

Users have access to a default template and it is available for download in the pop up as illustrated below.



EXPORT SETTINGS

ENVIRONMENT AND LANGUAGE

AUTOTAG SETTINGS

☒ Upload & Use Custom Tags

Upload your custom tagging preferences. Here is the template you can use to upload your tags :

[Template.xlsx](#)

Upload

Download

SAVE

#### 4. Add the custom tags

To add the custom tags, users have to list them under the header of each auto tag object type.

The screenshot shows the Excel interface with the following elements:

- AutoSave:** OFF
- Ribbon Tabs:** Home, Insert, Draw, Page Layout, Formulas
- Home Tab Groups:**
  - Paste:** Includes icons for Paste, Paste and Match Styles, and Paste and Match Styles and Formatting.
  - Font:** Includes an icon for Font settings.
  - Alignment:** Includes an icon for Alignment settings.
  - Number:** Includes an icon for Number settings.
- Formula Bar:** Shows the active cell D9 with a formula bar containing a function icon (fx) and a text input field.
- Data Table:**

	A	B	C	D	E
1	Role	Asset	Definition	Rule	Procedure
2	Role1	Asset1	Definition1	Rule1	Procedure1
3	Role2	Asset2	Definition2	Rule2	Procedure2
4	Role3	Asset3	Definition2	Rule3	Procedure3
5					
6					
7					

## 5. Upload the the Custom Tags

When all the custom tags are added, users will upload the new file.

×

EXPORT SETTINGS

ENVIRONMENT AND LANGUAGE

AUTOTAG SETTINGS

☒ Upload & Use Custom Tags

Upload your custom tagging preferences. Here is the template you can use to upload your tags : [Template.xlsx](#)

Replace

Template (2).xlsx

Download

SAVE

## 6. Download the custom file to edit/add tags

The custom tags file will always be available for download if users have to edit or adjust their list of tags.

×

EXPORT SETTINGS

ENVIRONMENT AND LANGUAGE

AUTOTAG SETTINGS

☒ Upload & Use Custom Tags

Upload your custom tagging preferences. Here is the template you can use to upload your tags : [Template.xlsx](#)

Replace

Template (2).xlsx

Download

SAVE



After uploading the custom tags, users can click on the desired type of Auto Tag to see the concerned data converted into EPC objects

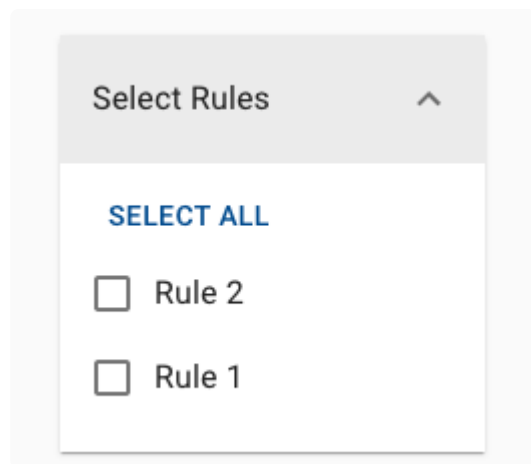
# Rule Selection

## Functionality

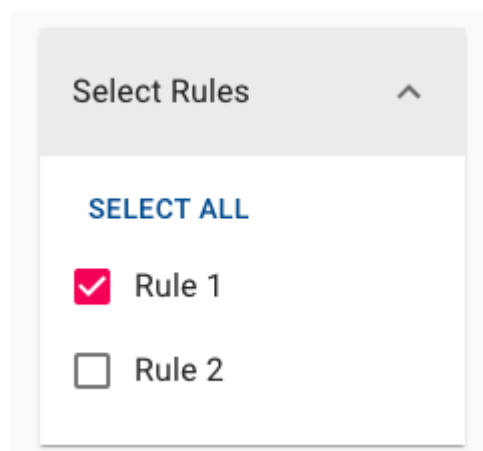
In Parser, when users create rules, they can select rules in the dropdown of Rule Selection.

## How it works

To use this feature, users go to the section Rule Selection.



Users will have the possibility to apply them or not, by checking or unchecking each rule.



By checking or unchecking them, users will be able to see in real time how the rule is applied or not to the data.



We recommend applying the Parsing before the rules to identify the parts of the document that will need to be adjusted by the rules

# Parsing Documents

---

## Functionality

The Parsing process is the one that will apply the manual/auto tags to the rest of the document based on :  
Format, context, style, etc.

## How it works

Once the document is uploaded and the tagging is in progress, user might apply the parsing to retrieve the data in the document.

For a better quality parsing, users should follow this few best practices :

### Document original format

The Parser will use the original document formatting as a pattern to be able to process the document data. The result will always be more optimal if the original document has a structured content. A special attention is required for: Information Hierarchy (h1, h2, etc.), lists, bold vs light formats, table structures, etc.

### Tagging Hierarchy

When creating a template or tagging a document for the first time, it's important to think about the data hierarchy.



We recommend to always try to tag the objects by order of hierarchy. For example, top to bottom tagging : Process Set Name > Process Set Description > Process Name > Process Name Description > Task Name > Task Name Description.

When tagging the document, users should always validate the data on the Hierarchy and Association table on the left of the Screen.

### Tagging objects

It's recommended to tag the integrality of the text as objects. Partially tagged objects might result in errors when the data will be exported.

#### Example on how to tag the text:

Original text

## 5 Purpose and Process

### 5.1 Purpose of Process Management

The purpose of Process Management is to define and continuously improve integrated and effective end-to-end processes and a documentation architecture built on high performing processes in time and quality to ensure compliant processes reflecting the newest stage of regulatory requirements.

In this example, the Sequence numbers were tagged separately and just before the object names. It's important to tag the whole object description but always avoiding to tag unnecessary spaces.

## 5 Purpose and Process

### 5.1 Purpose of Process Management

The purpose of Process Management is to define and continuously improve integrated and effective end-to-end processes and a documentation architecture built on high performing processes in time and quality to ensure compliant processes reflecting the newest stage of regulatory requirements.

The following image represent what a wrong tagging looks like that can result in data errors. In this example, Sequence numbers are merged with object names and unnecessary spacing is tagged at the end of the paragraph.

## 5 Purpose and Process

### 5.1 Purpose of Process Management

The purpose of Process Management is to define and continuously improve integrated and effective end-to-end processes and a documentation architecture built on high performing processes in time and quality to ensure compliant processes reflecting the newest stage of regulatory requirements.

**Example on how to correctly tag cells in a table for the parsing:**

User can only tag the first row of cells

Description	Assigned Roles & Document Reference
<b>6.4.1 Review and comment</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> start review process in LifeDoc in case of ADVANCE review for correctness and feasibility check</li> <li><input type="checkbox"/> stop review workflow in LifeDoc</li> </ul>	PM GSOP 103
<b>6.4.2 Evaluate comments out of review</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> evaluate comments out of review according to regulatory requirements, operational feasibility, aspect of standardization, timelines of revision</li> <li><input type="checkbox"/> incorporate results from evaluation into the document</li> <li><input type="checkbox"/> send document to BO for finalization</li> </ul> <b>Remarks</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> if necessary, the PM contacts the DT for final evaluation of comments</li> </ul>	PM DT
<b>6.4.3 Finalize document</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> check the document for completeness and consistency</li> <li><input type="checkbox"/> prepare document for approval</li> <li><input type="checkbox"/> design BPM flows according to final document draft</li> </ul>	BO

After clicking on Parse, all tables with the same structure will be tagged accordingly to what was indicated in

the first row

Description	Assigned Roles & Document Reference
<b>6.4.1 Review and comment</b> <ul style="list-style-type: none"> <li>□ start review process in LifeDoc in case of ADVANCE review for correctness and feasibility check</li> <li>□ stop review workflow in LifeDoc</li> </ul>	PM GSOP 103
<b>6.4.2 Evaluate comments out of review</b> <ul style="list-style-type: none"> <li>□ evaluate comments out of review according to regulatory requirements, operational feasibility, aspect of standardization, timelines of revision</li> <li>□ incorporate results from evaluation into the document</li> <li>□ send document to BO for finalization</li> </ul> <b>Remarks</b> <ul style="list-style-type: none"> <li>□ if necessary, the PM contacts the DT for final evaluation of comments</li> </ul>	PM DT
<b>6.4.3 Finalize document</b> <ul style="list-style-type: none"> <li>□ check the document for completeness and consistency</li> <li>□ prepare document for approval</li> <li>□ design BPM flows according to final document draft</li> </ul>	BO

## 6.5 Approve Document

Description	Assigned Roles & Document Reference
<b>6.5.1 Approve content</b> <ul style="list-style-type: none"> <li>□ prepare the document for GMP/GDP – Decision Board</li> </ul> <b>Remark:</b> <ul style="list-style-type: none"> <li>□ in case of monodivisional document: start the approval workflow directly to Head of divisional QA without presentation to GMP/GDP Decision Board. GMP/GDP Decision Board is informed about approved monodivisional documents afterwards by the QARP</li> </ul>	PM, BO, QARP
<b>6.5.2 Approve or reject document</b> <ul style="list-style-type: none"> <li>□ approve content of document by GMP/GDP Decision Board</li> <li>□ approve process flows in myBPM by GPO</li> </ul>	GMP/GDP – Decision Board GPO (PM)



# Rule Builder

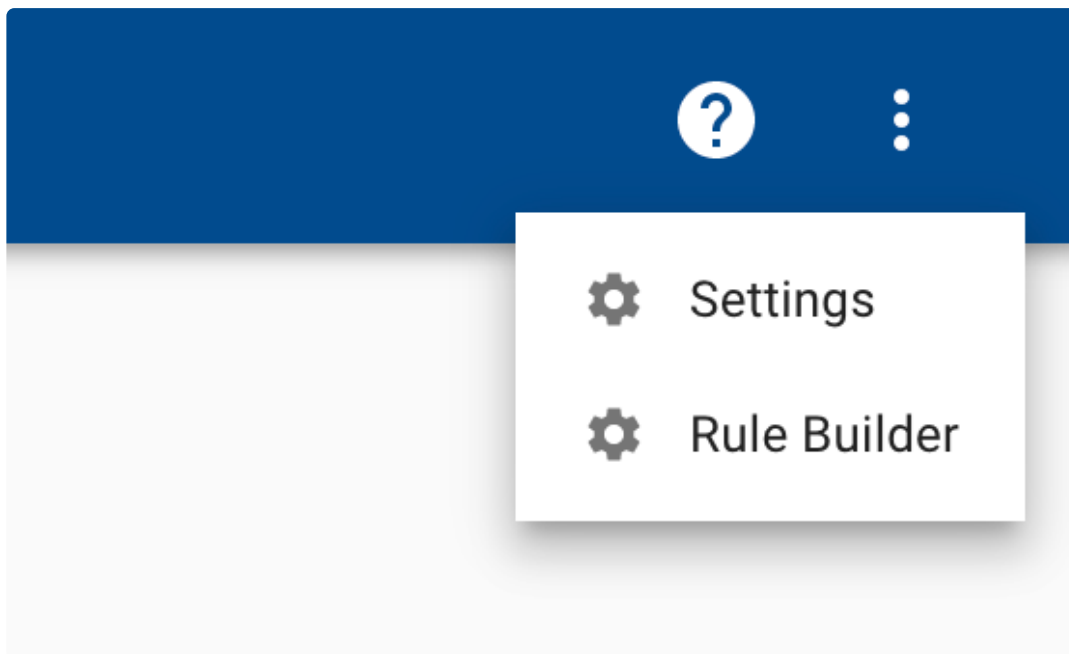
---

## Introduction to the Rule builder

In this advanced section of the Parser, user will be able to create rules that can improve the quality of the parsing. These rules are helpful for different cases. For example : when the original document is not formatted correctly, when users want to mass replace objects that are already tagged, ignore some specific tags, etc.

## How it works

To access the Rule builder , users click on the three dotted menu on the top right corner of the screen and then click on “Rule Builder”



The user will be taken to the Rule Builder :

× Rule Builder

ADD RULE

Rule Name

**All Conditions** (all the conditions must be met)

ADD CONDITION

**Any Conditions** (at least one of the conditions must be met)

ADD CONDITION

Action

REMOVE

SAVE

RESET TO DEFAULT

GO TO PARSER

## Add New Rule

By clicking *Add Rule* users will be able to add another set of rules that they can apply to the parsing. Parser will apply the rules one by one, in the order of creation.

### Rule Name

This field will let user to name each rule. This will help differentiate the in the parsing screen, where users can check or uncheck them so the can be applied to the text.

### All Conditions

This section will allow the users to be able to to create a set of rules/conditions : All conditions must be met, to be able to apply the rule and the action.

### Any Conditions

This section will allow the users to create rules/conditions : At least one of the conditions is met to apply the action.

### Actions

Actions available :

- Tag as : This action triggers a new field to let the user to choose an EPC Object that will replace the object previously selected in the conditions
- Ignore Tag : This action doesn't need to open the second field and it will just ignore the tag of the selected

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object

- Ignore in Export : This action doesn't need to open the second field and the tag will remain in the Parser but it will be ignored in the export

### Remove & Save

- Remove : Will delete the rule
- Save : Saves the rule

## Building a rule

Rule Name

**All Conditions** (all the conditions must be met)



ADD CONDITION

**Any Conditions** (at least one of the conditions must be met)

## First field will contain the following:

**All Conditions** (all the conditions must be met)

Any Text

Any Text In Paragraph

Process Set Name

Process Set Description

Process Name

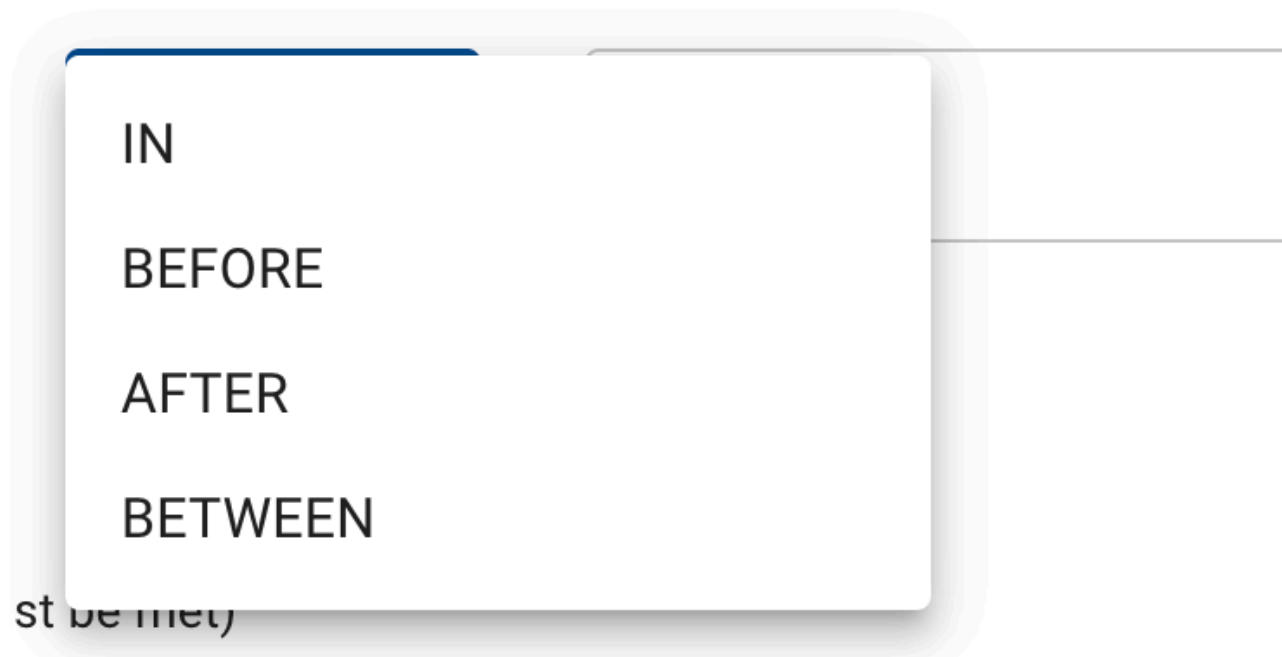
Process Description

must be met)

Objects: All first and second level objects that are available in EPC

Any text: Refers to any text without considering the formatting or the paragraphs. This is mostly used when users need to specify sections in the text where the rule will be applied

## Second field will contain the condition itself:



– **IN:** This condition will mostly be used in a scenario where users want to target specific Object Names IN (or inside) Object Description.

A common scenario can be while using the auto tag option. In this case we can find a situation where users want to ignore some of the tags for various reasons. An example of rule for this scenario can be :

**All Conditions** (all the conditions must be met)

Role Name	IN	Process Description
-----------	----	---------------------

ADD CONDITION

**Any Conditions** (at least one of the conditions must be met)

ADD CONDITION

**Action**

IGNORE TAG
------------

– **BEFORE:** This condition will be useful to users that need to target specific parts of the document using an object or an element as a point of reference.

This rule can be used combining the previous rule illustrated above. Here's an example if user needs to ignore all Roles Names that are in a Process Description **AND** also, they have to be **before** a Process Goal in the document:

Role Name ▼	IN ▼	Process Description ▼	
Role Name ▼	BEFORE ▼	Process Goal ▼	
<div>ADD CONDITION</div>			

– **AFTER:** This condition will be useful to users that need to target specific parts of the document that are after an object or an element as a point of reference.

– **BETWEEN:** This condition works as a combination of BEFORE and AFTER.

### Third Field can contain Objects or Custom Text:

Once user set the condition in the second field they can close the rule with an object or with custom text.

The custom text fields can be really useful when users have to target specify start and/or end of points of references in the document.

Here's an example in a document where the users weren't able to table process roles and their description due to the document formatting :

Process Manager  
QINT Quality International

#### 4 Responsibilities and Assigned roles

- Process Manager (PM): responsible to create processes and respective documents according to the defined process lifecycle by drafting, review and attribution of the document.
- External Author (EA): responsible to contribute with content e.g. of monodivisional documents without editor rights in LifeDoc. System Owner of IT-systems also act as EA and are responsible for updating the content of the respective operational manuals.
- Back-Office (BO): responsible to process documents in LifeDoc during the approval and distribution phase of the document including the formal checks of the document.
- Drafting Team (DT): responsible to actively provide input in drafting processes and documents, consisting of members such as Subject Matter Experts (SMEs), Business and System Owner according to CP 2001 in case IT system specific regulations
- Quality Area Responsible Person (QARP): responsible to
  - align with other QMS functions regarding QMS structure and content
  - approve cross divisional Supplements, Change Requests (CRs) and cross divisional Best Practice documents
- GMP/GDP Decision Board (DB): responsible to
  - approve the content of the QMS GMP/GDP processes/documents
  - approve the annual Quality Planning and its revisions/ updates over the year
- Divisional/ Business Unit/ Development Q Heads, Head of PKM, Head of QINT: responsible to approve global documents in LifeDoc
- GPO approves processes in myBPM and ensures alignment between QMS und myBPM process flows

#### 5 Purpose and Process

##### 5.1 Purpose of Process Management

The purpose of Process Management is to define and continuously improve integrated and effective end-to-end processes and a documentation architecture built on high performing processes in time and quality to ensure compliant processes reflecting the newest stage of regulatory requirements.

If user select Process Manager (PM): as a role name and the rest of the paragraph as a role description :

#### 4 Responsibilities and Assigned roles

- **Process Manager (PM):** responsible to create processes and respective documents according to the defined process lifecycle by drafting, review and attribution of the document.
- External Author (EA): responsible to contribute with content e.g. of monodivisional documents without editor rights in LifeDoc. System Owner of IT-systems also act as EA and are responsible for updating the content of the respective operational manuals.
- Back-Office (BO): responsible to process documents in LifeDoc during the approval and distribution phase of the document including the formal checks of the document.

But if parsed, the current result will be that everything is tagged as a Role name :

## System Security Information

### Responsibilities and Assigned roles

- **Process Manager (PM):** responsible to create processes and respective documents according to the defined process lifecycle by drafting, review and attribution of the document.
- **External Author (EA):** responsible to contribute with content e.g. of monodivisional documents without editor rights in LifeDoc. System Owner of IT-systems also act as EA and are responsible for updating the content of the respective operational manuals.
- **Back-Office (BO):** responsible to process documents in LifeDoc during the approval and distribution phase of the document including the formal checks of the document.
- **Drafting Team (DT):** responsible to actively provide input in drafting processes and documents, consisting of members such as Subject Matter Experts (SMEs), Business and System Owner according to CP 2001 in case IT system specific regulations
- **Quality Area Responsible Person (QARP):** responsible to
  - align with other QMS functions regarding QMS structure and content
  - approve cross divisional Supplements, Change Requests (CRs) and cross divisional Best Practice documents
- **GMP/GDP Decision Board (DB):** responsible to
  - approve the content of the QMS GMP/GDP processes/documents
  - approve the annual Quality Planning and its revisions/ updates over the year
- **Divisional/ Business Unit/ Development Q Heads, Head of PKM, Head of QINT:** responsible to approve global documents in LifeDoc
- **GPO** approves processes in myBPM and ensures alignment between QMS und myBPM process flows

### Purpose and Process

#### Purpose of Process Management

### Rule to make the tagging work correctly:

#### Rule 1

Rule Name

Rule 1

All Conditions (all the conditions must be met)

Any Text	BETWEEN	Custom Text	Custom Text 4 Responsibilities and
Custom Text 5 Purpose and Process			
Any Text In Paragraph	BEFORE	Custom Text	Custom Text :
<div>ADD CONDITION</div>			

Any Conditions (at least one of the conditions must be met)

ADD CONDITION

Action

TAG AS	Role Name
--------	-----------

#### Rule 2

Rule Name

Rule 2

**All Conditions** (all the conditions must be met)

Any Text	BETWEEN	Custom Text	Custom Text 4 Responsibilities and
Custom Text 5 Purpose and Process			
Any Text In Paragraph	AFTER	Custom Text	Custom Text :
ADD CONDITION			

**Any Conditions** (at least one of the conditions must be met)

ADD CONDITION

**Action**

TAG AS	Role Description
--------	------------------

After applying the two rules, this is the correct result :

QINT      Quality International

#### 4 Responsibilities and Assigned roles

- **Process Manager (PM):** responsible to create processes and respective documents according to the defined process lifecycle by drafting, review and attribution of the document.
- **External Author (EA):** responsible to contribute with content e.g. of monodivisional documents without editor rights in LifeDoc. System Owner of IT-systems also act as EA and are responsible for updating the content of the respective operational manuals.
- **Back-Office (BO):** responsible to process documents in LifeDoc during the approval and distribution phase of the document including the formal checks of the document.
- **Drafting Team (DT):** responsible to actively provide input in drafting processes and documents, consisting of members such as Subject Matter Experts (SMEs), Business and System Owner according to CP 2001 in case IT system specific regulations
- **Quality Area Responsible Person (QARP):**



# Export

## Functionality

This feature allows users to export the document data objects to EPC.

## How it works

To Export the data to EPC, users can click on the Export button. The action is available after the first tag of the document :

The screenshot displays a document editor interface. At the top, it shows 'Current Source(s): CQ\_Manage Process LifeCycle.docx' and 'Current Template: 123'. The main content area is divided into sections. Section 6.4 'Review Document' contains a table with three rows of tasks, each with a description and assigned roles. Section 6.5 'Approve Document' is partially visible below. On the right sidebar, there are buttons for 'Select Rules', 'AUTO TAGGING', 'PARSE', '+ SAVE TEMPLATE', and 'EXPORT' (which is highlighted with a red box). Below 'EXPORT' are 'PREVIOUS' and 'CLEAR ALL' buttons.

Description	Assigned Roles & Document Reference
<b>6.4.1 Review and comment</b> <ul style="list-style-type: none"><li>start review process in LifeDoc in case of ADVANCE review for correctness and feasibility check</li><li>stop review workflow in LifeDoc</li></ul>	PM GSOP 103
<b>6.4.2 Evaluate comments out of review</b> <ul style="list-style-type: none"><li>evaluate comments out of review according to regulatory requirements, operational feasibility, aspect of standardization, timelines of revision</li><li>incorporate results from evaluation into the document</li><li>send document to BO for finalization</li></ul> <b>Remarks</b> <ul style="list-style-type: none"><li>if necessary, the PM contacts the DT for final evaluation of comments</li></ul>	PM DT
<b>6.4.3 Finalize document</b> <ul style="list-style-type: none"><li>check the document for completeness and consistency</li><li>prepare document for approval</li><li>design BPM flows according to final document draft</li></ul>	BO

Description	Assigned Roles & Document Reference
<b>6.5.1 Approve content</b>	

The most important part of the Parser is being able to export the data to EPC.

The export feature is simple to use and will give the possibility to the user to have more flexibility on the different export settings based by preferences. Two important aspects to consider for the Export :

1. Export Settings Menu
2. Environment & Language Menu

# Export Settings

## Functionality

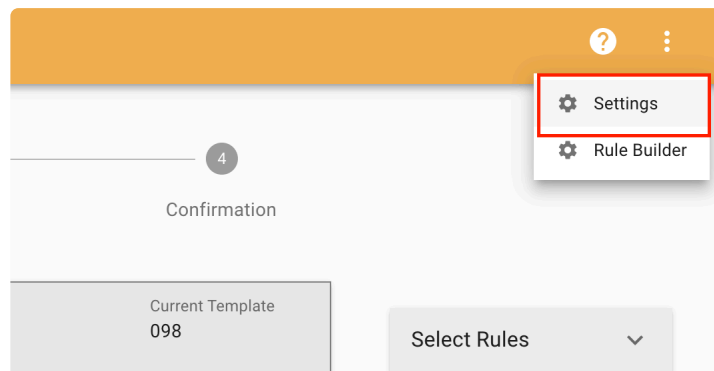
In Parser in EPC, users can access the export settings in the settings icon located on the top right of the page.

## How it works

To set up the Export for Parser when a document is parsed and users are ready to export data to EPC, users are able to choose between 2 options : Create New objects or Create and re-use

### 1. Go to Settings

On the top right of the screen users can find the settings window



### 2. Find the export tab

**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**

The two available options :

- Create new object : 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

**Example of behaviours**

Given we tagged the words "Billing Process" As "Process Name" in Parser and we export the Object :

1. IF the object is already existing in EPC (Object\_Name= Billing Process AND Object\_Type = Process Name) : It will be matched and will not create a new object
2. IF the object doesn't have a description in EPC. While, in Parser – As a user, I associated a Process Description to the Process Name (Billing Process) : It will update the existing object with the new Description.

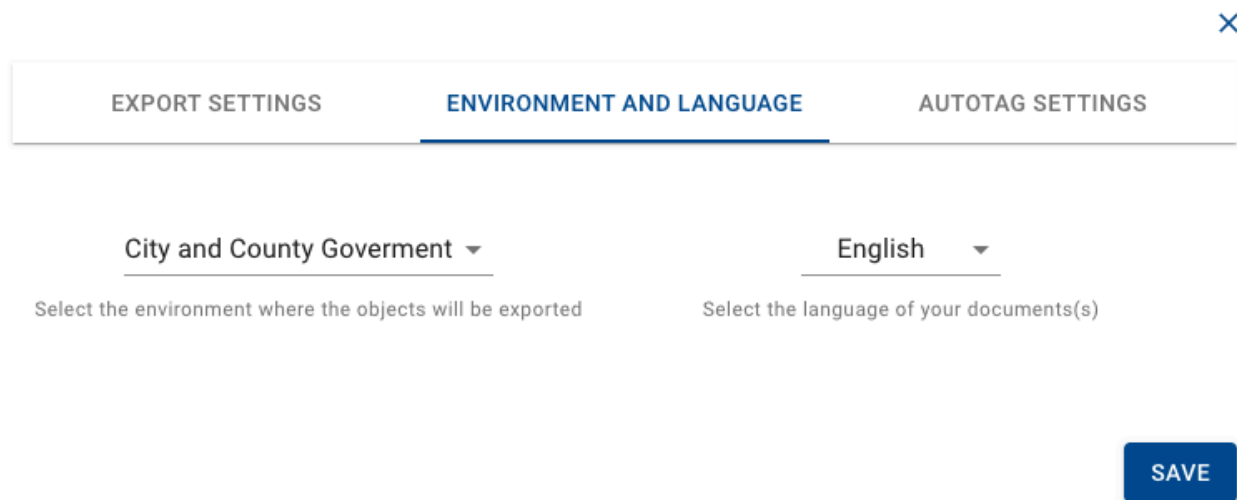
# Environment & Language

## Functionality

Users in Parser can set their own Environment and Language settings.

## How it works

In the settings pop up, the user will find the Environment & Language tab.



The screenshot shows a settings pop-up window with a close button (X) in the top right corner. The pop-up has three tabs: 'EXPORT SETTINGS', 'ENVIRONMENT AND LANGUAGE' (which is selected and highlighted with a blue underline), and 'AUTOTAG SETTINGS'. Below the tabs, there are two dropdown menus. The first dropdown is labeled 'City and County Government' with a downward arrow, and below it is the text 'Select the environment where the objects will be exported'. The second dropdown is labeled 'English' with a downward arrow, and below it is the text 'Select the language of your documents(s)'. At the bottom right of the pop-up is a blue button labeled 'SAVE'.

- Environment : This dropdown to select the environment where the objects will be exported.
- Language : This dropdown to select the language of destination documents(s).