EPC10 - WebApp Manual

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Interfacing Technologies Corporation

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Table of Contents

Technical Support **8**

Disclaimer **9**

FAQs **10**

1.0 Enterprise Process Center **11**

1.1 Process Viewing 12

1.2 Collaborative Environment 14

1.3 User Categories 15

1.4 BPMN 2.0 16

1.5 Governance 17

1.6 Performance 19

2.0 EPC 10.0 Functions and Features **20**

2.1 Scalability & Security 21

2.2 Mobile 22

2.3 Impact Visibility 23

2.4 Favorites and Subscriptions 24

2.5 Published Only vs. Latest 25

2.6 Widgets 26

2.7 List View 27

2.8 Quick Graph View 28

2.9 Impact Graph 29

2.10 Hierarchy Graph 30

2.11 IPL Expansion 31

2.12 Enhanced Process Approval Cycle 32

3.0 The Web App **33**

3.1 What is the Web App? 34

3.2 What Can I do in EPC Web App? 35

3.3 What is RASCI-VS? 36

4.0 Navigating the Web App **37**

4.1 Logging in 38

4.1.1 Integrated Login (SSO) 40

4.2 Home 41

4.2.1 Widgets 42

4.2.1.1 Default Widgets 44

4.2.1.2 How to Remove Widgets from Home Page 45
4.2.1.3 How to Add Widgets from Home Page 47
4.2.1.4 How to Customize Widgets 49
4.2.1.4.1 Customize My Objects Widgets 50
4.2.1.4.2 Customize My Performance Widgets 69
4.2.1.4.3 Customize My Actions Widgets 85
4.2.1.4.4 Customization Rules 89
4.2.1.4.4.1 Widget Filter Categories 94
4.2.1.5 How to Reset Default Widgets 97
4.2.1.6 How to Relocate Widgets within Home Page 98
4.2.1.6.1 Layout Options 99
4.2.1.6.2 Moving Widgets within a Home Page 103
4.2.1.7 Resizing Widgets 105
4.3 General Navigation 106
4.3.1 Navigation between Modules 108
4.3.2 Navigation within a Module 111
4.4 Process 116
4.4.1 Module Overview 117
4.4.2 List 119
4.4.2.1 Sorting 123
4.4.2.2 Filtering 125
4.4.2.2.1 Default Filter 127
4.4.2.2.2 Remove Filter 128
4.4.2.2.3 Add Filter 129
4.4.2.2.4 Combine Filter 130
4.4.2.3 Quick Graph View 131
4.4.3 Graph 132
4.4.3.1 Graph Navigation 133
4.4.3.1.1 Navigating in Graphs 136
4.4.3.1.1.1 Fit Screen 138
4.4.3.1.1.2 Full Screen 140
4.4.3.1.1.3 Zoom In 142
4.4.3.1.1.4 Zoom Out 144
4.4.3.1.1.5 Options 146
4.4.3.1.1.6 Auto Layout 148
4.4.3.1.1.7 Print 150
4.4.3.1.1.7.1 Printing from Internet Explorer 152
4.4.3.1.1.8 Subscribe 156
4.4.3.2 Map Graph 157

4.4.3.2.1 Graph View 158
4.4.3.2.2 Swimlanes 159
4.4.3.2.3 Matrix Swimlanes 161
4.4.3.2.4 Graph Customization 163
4.4.3.3 Impact Graph 185
4.4.3.4 Hierarchy Graph 190
4.4.4 Details 193
4.4.4.1 Navigation 194
4.4.4.1.1 Toolbar 196
4.4.4.1.1.1 Value-Stream Navigation 197
4.4.4.1.1.2 Hierarchy Navigation 200
4.4.4.1.1.3 Print 201
4.4.4.1.1.4 Subscribe 204
4.4.4.1.2 Details Drilldown 205
4.4.4.2 Attributes 207
4.4.4.2.1 Description 208
4.4.4.2.2 Goal 209
4.4.4.2.3 Responsibilities 210
4.4.4.2.4 Associations 211
4.4.4.2.5 Documents 212
4.4.4.2.6 Properties 214
4.5 Performance 215
4.5.1 Module Overview 216
4.5.2 List 218
4.5.2.1 Sorting 221
4.5.2.2 Filtering 223
4.5.2.2.1 Add Filter 224
4.5.2.2.2 Remove Filter 226
4.5.2.2.3 Combine Filter 227
4.5.2.3 Quick Graph View 228
4.5.3 Graph 230
4.5.3.1 Graph Navigation 231
4.5.3.1.1 Navigating In Graphs 233
4.5.3.1.1.1 Fit Screen 235
4.5.3.1.1.2 Full Screen 237
4.5.3.1.1.3 Zoom In 239
4.5.3.1.1.4 Zoom Out 240
4.5.3.1.1.5 Print 241
4.5.3.1.1.6 Subscribe 243

4.5.3.2 Impact Graph 244
4.5.3.3 Hierarchy Graph 248
4.5.3.4 Overview Graph 252
4.5.3.4.1 Inputting Performance 255
4.5.4 Details 257
4.5.4.1 Toolbar 258
4.5.4.1.1 Print 259
4.5.4.1.2 Subscribe 260
4.5.4.2 Attributes 261
4.5.4.2.1 Description 262
4.5.4.2.2 Responsibilities 263
4.5.4.2.3 Associations 264
4.5.4.2.4 Documents 265
4.5.4.2.5 Properties 267
4.6 Organization 268
4.6.1 Module Overview 270
4.6.2 List 272
4.6.2.1 Sorting 274
4.6.2.2 Filtering 276
4.6.2.2.1 Add Filter 277
4.6.2.2.2 Remove Filter 279
4.6.2.2.3 Combine Filter 280
4.6.2.3 Quick Graph View 281
4.6.3 Graph 282
4.6.3.1 Graph Navigation 283
4.6.3.1.1 Navigating In Graphs 284
4.6.3.1.1.1 Fit Screen 286
4.6.3.1.1.2 Full Screen 288
4.6.3.1.1.3 Zoom In 290
4.6.3.1.1.4 Zoom Out 291
4.6.3.1.1.5 Print 292
4.6.3.1.1.6 Subscribe 294
4.6.3.2 Impact Graph 295
4.6.3.3 Hierarchy Graph 299
4.6.4 Details 302
4.6.4.1 Navigation 303
4.6.4.1.1 Toolbar 304
4.6.4.1.1.1 Print 305
4.6.4.1.1.2 Subscribe 306

4.6.4.2 Attributes 307
4.6.4.2.1 Description 308
4.6.4.2.2 Organization Sub Units 309
4.6.4.2.3 Directors 310
4.6.4.2.4 Documents 311
4.6.4.2.5 Properties 313
4.7 Documents 314
4.7.1 Module Overview 315
4.7.2 List 317
4.7.2.1 Sorting 320
4.7.2.2 Filtering 322
4.7.2.2.1 Add Filter 323
4.7.2.2.2 Remove Filter 325
4.7.2.2.3 Combine Filter 326
4.7.2.3 Quick Graph View 327
4.7.3 Graph 328
4.7.3.1 Graph Navigation 329
4.7.3.1.1 Navigating In Graphs 331
4.7.3.1.1.1 Fit Screen 333
4.7.3.1.1.2 Full Screen 335
4.7.3.1.1.3 Zoom In 337
4.7.3.1.1.4 Zoom Out 338
4.7.3.1.1.5 Print 339
4.7.3.1.1.6 Subscribe 341
4.7.3.2 Impact Graph 342
4.7.3.3 Hierarchy Graph 345
4.7.4 Details 348
4.7.4.1 Navigation 349
4.7.4.1.1 Toolbar 350
4.7.4.1.1.1 Download 351
4.7.4.1.1.2 Preview 352
4.7.4.1.1.3 Print 361
4.7.4.1.1.4 Subscribe 362
4.7.4.2 Attributes 363
4.7.4.2.1 Description 364
4.7.4.2.2 File Details 365
4.7.4.2.3 Responsibilities 366
4.7.4.2.4 Associations 367
4.7.4.2.5 Documents 368

4.7.4.2.6 Properties ... 370
4.8 Collaboration ... 371
4.8.1 Navigation ... 372
4.8.1.1 Collaboration Module ... 373
4.8.1.1.1 Sorting ... 375
4.8.1.1.2 Filtering ... 377
4.8.1.1.2.1 Add filter ... 378
4.8.1.1.2.2 Remove Filter ... 380
4.8.1.1.2.3 Combine Filter ... 381
4.8.1.2 Item Pages ... 382
4.8.2 Using Collaboration Features ... 385
4.8.2.1 Initiating Collaboration ... 386
4.8.2.2 Participating in Collaboration ... 394
4.8.2.2.1 Reply ... 395
4.8.2.2.2 Share ... 397
4.8.2.2.3 Vote ... 398
4.8.2.2.4 Close Topic ... 399
4.8.2.3 Monitoring Collaboration ... 401
4.8.2.4 Notification and Confirmation ... 402
4.8.3 Discussion ... 403
4.8.4 Question ... 404
4.8.5 Incident ... 405
4.8.6 Improvement Request ... 406

5.0 Search ... 408
5.1 Advanced Search ... 412

6.0 Notifications ... 414
6.1 Notification Organization ... 418
6.2 Enable/Disable Browser Notifications ... 425
6.2.1 Chrome Notifications ... 426
6.2.2 Firefox Notifications ... 427

7.0 Process Governance ... 429
7.1 Approval Cycle ... 430
7.1.1 Notification Emails ... 437
7.2 Confirmation ... 438
7.2.1 New Version Confirmation ... 439

8.0 My Profile ... 441
8.1 General ... 444

8.2 Preferences ... 445
8.2.1 Environment ... 446
8.2.2 Displayed Content ... 448
8.3 Language ... 450
8.4 Theme Roller ... 452
8.5 Authorizations ... 455

9.0 Environment Admin ... 456
9.1 Environment Settings ... 457
9.1.1 General ... 459
9.1.2 Search Index ... 462
9.1.3 Language ... 465
9.2 Environment Defaults ... 466
9.2.1 Home Page (Widgets) ... 467
9.2.2 Graphs (Process Map Graphs) ... 468

10.0 System Admin ... 470
10.1 System Settings ... 472
10.1.1 General ... 473
10.1.2 Users ... 476
10.1.2.1 Adding Users ... 477
10.1.2.2 Edit Existing Users ... 482
10.1.2.3 Delete Users ... 486
10.1.2.4 Manage User Groups ... 487
10.1.2.5 Search for Users ... 488
10.1.3 Groups ... 489
10.1.4 Search Index ... 492
10.1.5 System Settings ... 496
10.1.5.1 Editing Settings ... 500
10.1.6 Language ... 502
10.1.6.1 Managing Languages ... 503
10.1.6.2 Applying New Languages ... 504
10.1.6.2.1 Understanding Content Languages ... 505
10.1.6.2.2 Add New Languages ... 507
10.1.6.2.3 Remove Languages ... 508
10.1.6.2.4 Reorder Languages ... 509
10.2 System Defaults ... 510
10.2.1 Home Page (Widgets) ... 511

11.0 Icons and Glossary ... 512

11.1 Icons 513
11.1.1 Navigation Icons 514
11.1.2 In-Graph Icons 516
11.1.3 Toolbar Icons 518
11.2 Glossary (Key Terms) 519

Technical Support

Technical problems should be directed to your EPC System Administrator.

EPC must be registered with an up-to-date maintenance package in order to receive support from Interfacing Technologies.

For further information or support issues concerning EPC, please contact support through:
Support portal
or email support@interfacing.com

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Welcome

The EPC Web App is an integrated part of the Enterprise Process Center. The Web App presents a holistic view of the organization. All your activities and tasks are listed for you to manage and execute.

- Items requiring your specific approval are queued in the portlets.
- Collaboration is possible through discussion pages on every object in the EPC.
- Breakdown of the entire organization is laid out in detail in the modules.

FAQs

Please review the following questions. A short response has been prepared on this page, with a links to sections that can provide further details provided as well.

1. Why can't I login?
There are a few reasons why users may have difficulty logging into the EPC Web App for the first time. Contact your System Administrators to assure they they have a) Created your username and password b) Assigned your user to an environment.
If you experience further difficulties, please see the technical support section.

2. Why does my home page display "No Data Found" ?
The widgets on your home page are highly customization and must be set up by your System Administrators. If your System Administrators have not setup your organization's default widgets, they will have to be set up by users. For further details on how to setup and customize widgets, please see section 4.2.1.

3. How do I disable browser notifications?
Browser notifications are disabled through the individual settings of each browser. For further details on how to disable these notifications, please see section 6.2.

4. How do I change environments?
Users can change environments through their "My Profile" pages. For step-by-step instructions on how to change environments, please see section 8.1.

5. Why can't I preview files?
Document preview is limited by both document type and by browser. To see a complete list of documents available for preview, please see section 4.7.4.1.1.2.

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1.0 Enterprise Process Center

Enterprise Process Center (EPC) helps companies gain a 360 degree blueprint of the organization in support of complex improvement, compliance and transformation initiatives. The EPC goes beyond process mapping & analysis, it covers the full spectrum of lifecycle governance and collaboration, enterprise architecture (EA) and strategy-to-execution needs. The EPC offers a single repository to manage all complex business entity relationships and interdependencies, including: processes, procedures, roles, org units, resources, risks, controls, policies, rules, documents, strategic objectives, key performance indicators, systems, meta data & services. The EPC facilitates the alignment and visualization of strategic and operational performance and is often leveraged for quality, improvement, risk & audit management initiatives such as ISO, Lean, Basel III, SOX, and ITIL, amongst others.

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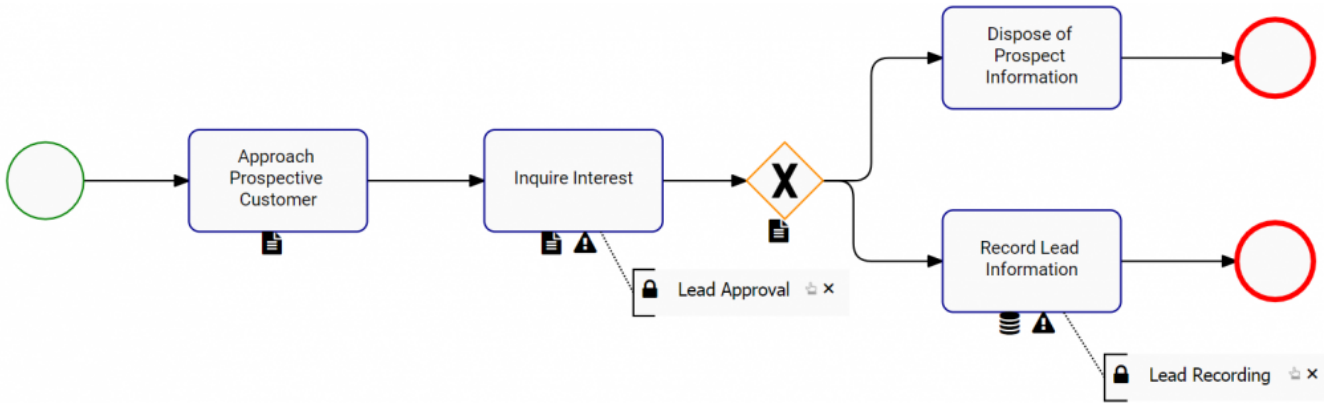
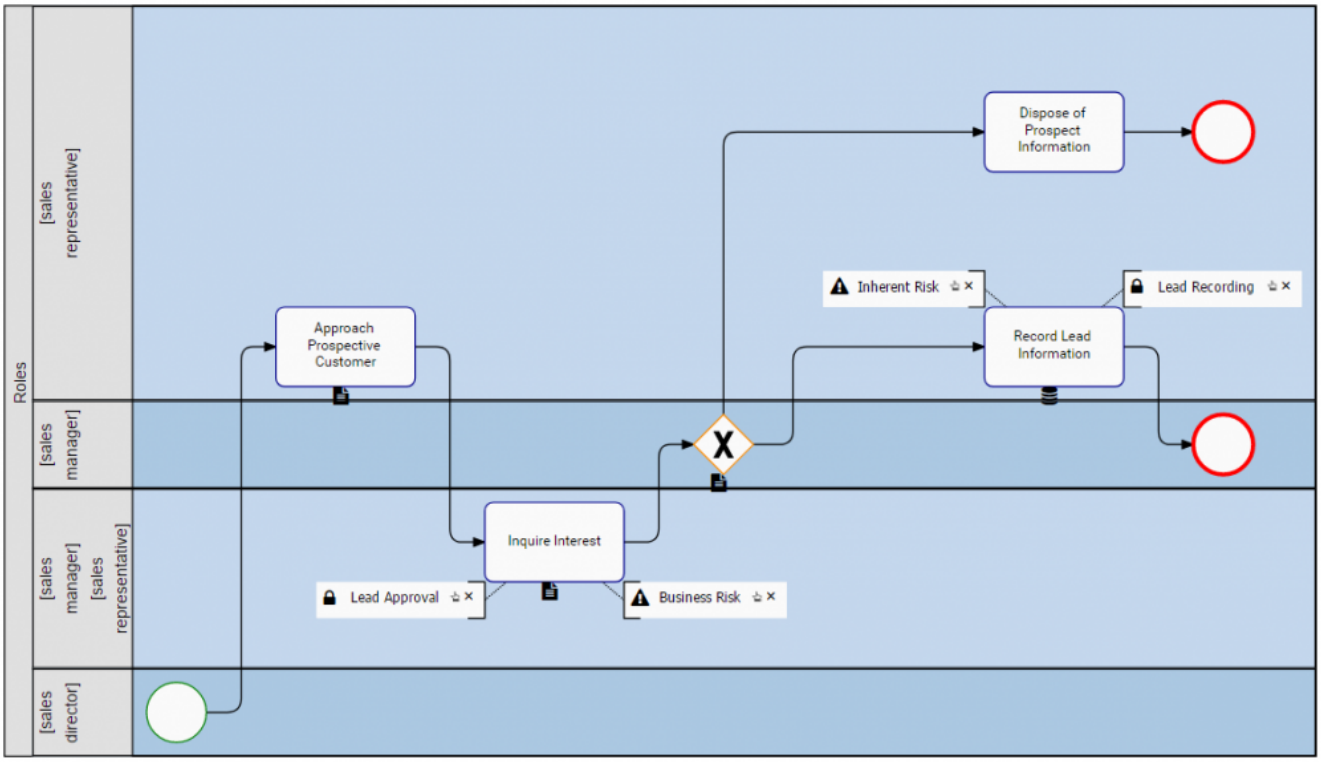
1.1 Process Viewing

Accessed initially as a list view, the EPC Web App allows users to view their business processes in a customizable and color coded environments. These views have various view-specific options that the user can define to display the process in a way that best suits them. For example: content, or objects, that are associated to the flow-objects can be shown as icons or annotations. Users can select from three different view options: Graph, Swimlane, and Matrix Swimlane.

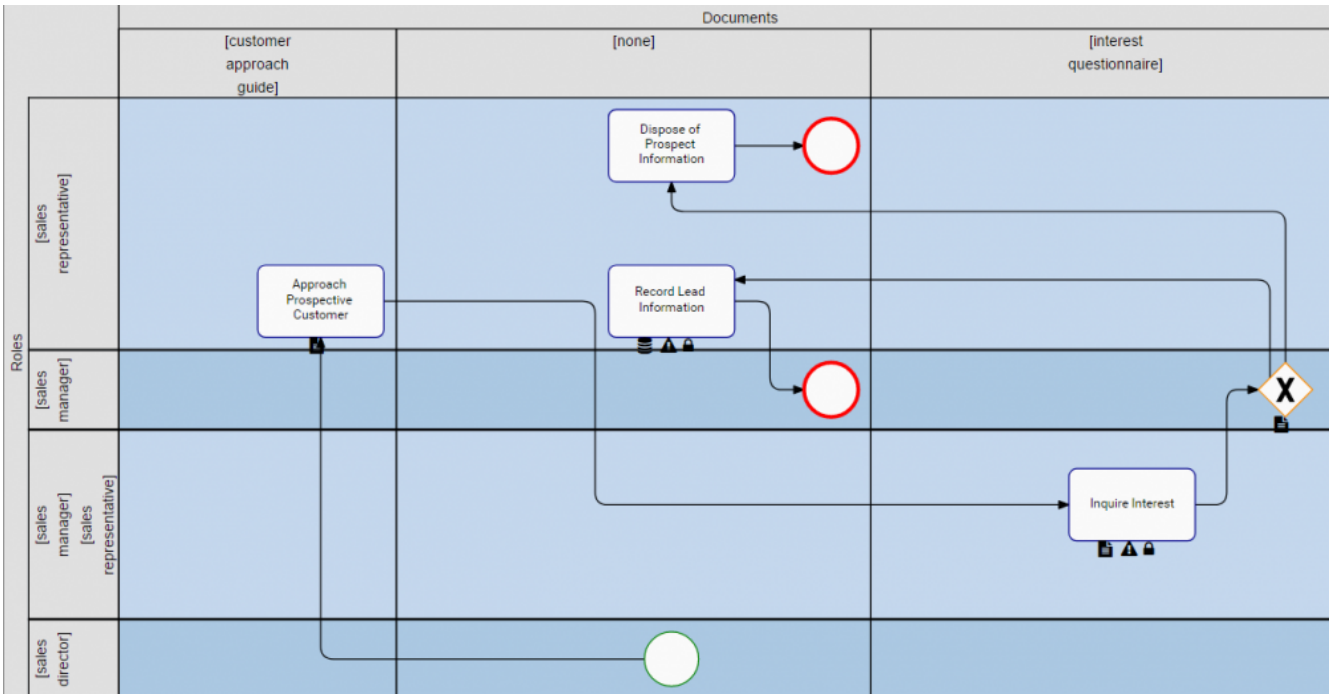
1. **Graph View**



2. **Swimlane**



3. **Matrix Swimlane**



Further details can be found in section 4.4.

1.2 Collaborative Environment

The EPC Web App's centralized environment encourages collaboration among employees. The Collaboration feature available for all objects provides a forum to suggest process improvements, ask questions, report incidents and collaborate with other users. Additionally, the platform provides traceability allowing users to view if an object has been altered, who has altered the object and/or processes relating to the user in question. Collaboration amongst users is facilitated by:

1. **Discussion Forums**: Individuals can ask questions, suggest improvements or report incidents with process participants within a dedicated forum. Conversations can be configured to include priority, impact, due dates, value and can be filtered by topic, date range, and topic status.
2. **Improvement Requests**: Improvement requests can be made by EPC users to further innovate and improve business components and processes.

The Collaboration feature is designed to increase inter-user collaboration by providing directed communication forums. These forums will optimize information sharing, reducing the likelihood and impact of information silos. The collaboration drives higher user adoption with increased transparency, critical thinking, employee accessibility, constructive discussions and community development.

Further detail can be found in **section 4.8**.

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1.3 User Categories

Users are divided into 5 major categories corresponding to their roles and responsibilities within the organization. The user classification pertains to the responsibilities for the different users within the system. The 5 categories are as follows

User	Responsibilities
Process Modelers (Modeling User)	• Input, monitor and maintain information inputted into the EPC Modeler • Responsible for the creation and optimization of EPC Web App Content (Process Maps, Documents, Performance Measures, etc.)
Process Owners (Power User)	• Approve process flow and process components changes • Approve process improvement requests • Follow process revisions frequencies • Follow the maturity of processes
Business Users (Analytical User)	• Consult processes to understand the business activity they are working in • Input and analyze analytical measures (KPIs, KCIs, KRIs) • Initiate discussions about processes • Initiate process improvement requests
Business Process Users (End User)	• Need to understand the process they are working on • Access to detailed task descriptions
System Admin (Admin User)	• Monitor and maintain system functionality • Oversee system use and maintenance activities

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1.4 BPMN 2.0

The Enterprise Process Center supports BPMN 2.0 as its standardized modelling notation. BPMN 2.0, as a notation, provides a globally recognized, universal language for process mapping and monitoring. It is ready for use by technical and business leaders across the globe and bridges the gap between business process design and process implementation.

BPMN 2.0 is the latest release of Business Process Management Notation by Object Management Group Inc. (OMG). This new release represents consolidation of new process mapping best practices to optimize clarity and understanding regarding process communication.

Please see http://www.omg.org/ for further detail regarding BPMN 2.0 logic and functionality.

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1.5 Governance

EPC Provides team members with a centralized reusable repository that can be worked on by several individuals in-parallel without the risk of neither duplicating content nor over-writing someone else's work. Employees are notified of newly published versions, are requested to confirm they have read and understood changes, and have a user-friendly forum to raise improvement requests or discuss issues as they arise. EPC simplifies this need with automated control measures such as review approval cycles, draft vs. published version read/ write and delete security access rights on all content. Additionally, the EPC platform tracks and stores all historical details of a modification, from request through to implementation, including all specifics of a change for detailed audit reporting. The major EPC features enabling effective and efficient governance are as follows:

1. **RASCI-VS Matrix**: Using the RASCI-VS matrix to assign responsibilities, they can better understand what is expected from them and see which assets have been made available to them. This increases employee accountability.

2. **Recurrent Notifications**: Employees are continuously informed on corporate standards & policies once new versions are published, whether there are incoming review cycles, or if they have required actions through their dashboards and Email notifications.

3. **Process Subscriptions**: Even if employees aren't directly associated to objects, they may still want to monitor them. For instance, a marketing employee may want to know if the employee assigned to a role she interacts with changes from one day to the other. She can thus subscribe to the existing role to be updated once the adjustment takes place.

4. **Read Confirmations**: Management can detect when their staff have seen information that was directed to them. They can therefore ensure that information was adequately transmitted, and make sure that changes are adopted and actions are performed.

5. **Automated Revision Cycles**: Organizations can be assured that information is kept up to date at all times through prompts requiring responsible employees to validate information's currency. This mitigates the risk of having to reassess processes for new project launches such as ERP implementations.

6. **Approval Cycle**: Organizational and process leaders must look to continuously maintain and improve themselves to remain efficient and effective in their respective fields. The Web App allows these leaders to manage operational innovation with the necessary controls to assure sustainable improvement.

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7. **Version Compare**: Leaders must be provided with the necessary tools to ease the decision making process. When a change is proposed, responsible parties are provided with a platform to directly, side-by-side, compare previous versions, and select the best alternative for their organization moving forward.

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1.6 Performance

Content alignment between strategy and operations (execution of strategy) is often lacking within organizations; targets are often set but areas to improve when targets are missed are usually obscure. The EPC communicates the strategy and specific objectives to all stakeholders; aligning corporate goals across the organization and encouraging all employees to contribute their part towards success on an ongoing basis.
EPC provides management the ability to monitor objectives, Key Performance Indicators (KPIs), Key Control Indicators (KCIs) and Key Risk Indicators (KRIs) at all levels and by process so that a proactive approach to correcting issues before they arise may be taken.. By setting desired targets, it becomes easy to quantify how far away teams are from reaching their goals. Assigning measurable targets allows all levels of employees to understand expectations manage activities and monitor performance throughout the life cycle of different processes in real time.
Fundamentally this generates Operational Intelligence throughout an organization, facilitated by the following elements enabled by the EPC:

1. **KPIs, KCIs and KRIs Monitoring and Measurement**: Users can choose to view the operational performance of each task within a process by associating micro metrics to them, or to do the same with processes as a whole. By doing so, individual task colors change to reflect their status.

2. **Performance Analytics**: Users can view a performance historic to immediately see potential cyclicality, trends, etc.

3. **Target Thresholds**: Color coded limits can be set to distinguish poor from exemplary performance and can be adjusted according to existing forecasts. This makes performance management that much more intuitive.

4. **Alternate Views**: Users can shift from and to list, graph and detail views to gain different kinds of insight on performance.

5. **Drill-Down Metrics**: Performance measures can be drilled-down to the micro level through the graph view. For instance, performance can be modeled to reflect gross margins by business unit, month, quarter, etc.

Further details can be found in section 4.5.

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2.0 EPC 10.0 Functions and Features

The EPC 10.0, while switching to a cloud-based platform, has added a variety of new features to enhance utility, usability and functionality.

The new features are as follows:

1. Increased Scalability and Security
2. Mobile Compatibility
3. Impact Visibility
4. Favorite and Subscription Classification
5. Published vs Latest Content Availability
6. Customizable Widgets
7. Enhanced List View
8. Quick Graph Viewing Capabilities
9. Impact Graphs
10. Hierarchy Graphs
11. Inter-Process Link Expansion
12. Enhanced Process Approval Cycle

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2.1 Scalability & Security

EPC 10 has enhanced security protocols and functions to effectively maintain clarity and safety of information.

The design of the new EPC leverages stateless architecture for the Web App and EPC Mobile App for easy and low-cost scalability. NCINX load balancer was added to distribute traffic across multiple Docker Containers, such as the Web App, BPC App, Filer Convertor, etc. The deployment on Dockers allows easy application server replication, enhancing load distribution.

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2.2 Mobile

In order to facilitate multi-platform use, Interfacing has developed mobile compatibility for all major smartphone and tablet devices. The platform is independent of mobile operating systems and specific browsers, allowing flexibility across a variety of mobile devices and platforms.

Navigation on mobile mirrors the computer-based EPC platforms with the integration of touch enabled navigation and zoom. With a responsive layout, the mobile platform will match mobile device screen size and device orientation to assure optimal user navigation.

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2.3 Impact Visibility

EPC 10 has increased visibility to optimize viewing of downstream business entities, relationships and associated impacts. To do so, the EPC has added 360 degree Impact graph on all objects with multi-level expansion across various object types. This enhanced graph visibility features viewing hierarchy options that can be enabled by content and system administrators.

Swimlane and Matrix Swimlane map graph viewing is now available of all objects. Map graphs can additionally be ranked as critical, high-risk and value-added to drive urgency and clarity within organizations.

Additional customization features enhance adaptation to user needs. This customization comes in the form of RASCI-VS map customization, enhancing map clarity and visibility.

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2.4 Favorites and Subscriptions

As a user, you can identify any object in EPC 10 as a Favorite, which will allow you to easily find them when in list view. List view can also be sorted by favorites to display them on the top or bottom of the list. See the sorting section in each module for more details about sorting.

Favorites can also be used in the home page widgets, allowing you to configure widgets so that they display your favorite items. See the Widgets section for more details about using favorites in widgets.

Users can be subscribed, and subscribe themselves to objects to assure that they are notified of any activity associated with the object. This creates a queue of crucial information that can be viewed by users, increasing internal communication while reducing undetected activities/improvements.

Further detail can be found in section 4.4.3.1.1.8.

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2.5 Published Only vs. Latest

EPC 10 has added 2 major viewing options for the Web App that allows authorized users to view finalized (published) work generated in the Modeler, as well as work-in-progress (latest) that has yet to be finalized.

As organizations map and optimize their processes in the Modeler, variable steps including new process modelling, forum discussions, voting, etc. can create parallel versions of activities. In order to allow internal optimization, without jeopardizing existing information, the EPC 10 provides Latest and Published information that can be viewed by authorized users. This allows organizations to drive continuous improvement, without slowing down day-to-day operations.

Once activities have been finalized and are published, they shift from the Latest category to the Published category.

Further detail can be found in section 8.2.2.

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2.6 Widgets

EPC 10 offers a customizable home page for all users, featuring a variety of widgets that users can add/ remove to enhance clarity and user functionality. These widgets are designed to give a quick view of crucial and pertinent information to the user upon system login. It provides a consolidated view of user-relevant information that users can customize based on personal need.

The available home page widgets are as follows;

1. My Objects
2. My Performance
3. My Actions

These widgets themselves can be further customized to feature specific elements pertaining to individual roles, responsibilities, documentation, KPIs, etc.

Further detail can be found in section 4.2.1.

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2.7 List View

EPC 10 features a new List View function, allowing users to easily view, navigate and search for objects in the EPC. List view allows you to see all objects that you have access too, including processes and related items (Performance Indicators, Documents, etc.)

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

Further detail can be found in section 4.4.2.

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2.8 Quick Graph View

Graph views, as seen above in the Process Viewing section, provide a visual representation of complete processes or sub-processes with associated key information. The EPC provides various Graph viewing formats in traditional Graph view, Swimlanes and Matrix Swimlanes depending on viewing preference.

In order to provide users with quick access to key information, EPC 10 features Quick Graph View function on objects within the EPC. This function allows users to immediately navigate to the Graph of the associated object.

The quick graph view is represented by the icon that will be featured across the EPC.
To use the feature, simply click on the icon and the user will be redirected to the object's Graphical viewing options.

Further detail can be found in section 4.4.2.3.

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2.9 Impact Graph

Impact Graphs have been added to the EPC to provide users with understanding of how their activities impact the different parts of their businesses. Understanding how individuals impact the business helps users develop business knowledge while highlighting key activities.

The Impact Graph, symbolized by icon provides users with a downstream visualization of how any process/object change may impact the organization. These impact graphs can be found in all Graph sections.

Further detail can be found in section 4.4.3.2.

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2.10 Hierarchy Graph

Hierarchy Graphs have been added to the EPC to provide users with a visualization of the process hierarchies. Viewing this hierarchy allows users to have a clear break-down of work structure, understanding key stakeholders and processes involved.

The Hierearchy Graph, symbolized by icon provides users with a top-down visualization of how processes and tasks are broken down. These hierarchy graphs can be found in all Graph sections.

Further detail can be found in section 4.4.3.4.

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2.11 IPL Expansion

EPC has simplified process viewing by integrating Inter-Process Links (IPL) Expansion within traditional process Map views. This function allows users to expand processes that are connected to other processes.

An IPL provides a visual representation of interconnected processes. The new IPL expansion feature allows users to see, within the Web App, how processes are connected to one another. Rather than forcing users to navigate to an alternative process, the IPL expansion allows users to view all connected processes within the same window.

Further detail can be found in section 4.4.3.2.4.

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2.12 Enhanced Process Approval Cycle

Continuous improvement is an important part of process mapping and process optimization. To enhance user's ability to drive continuous improvement within their organization, the EPC 10 has added comparative process viewing.

Comparative process viewing allows decision-making users to compare existing processes with the proposed process improvements made. This feature allows users, within one window, to analyze the alternative processes, easing the decision-making process.

Further detail can be found in section 7.1.

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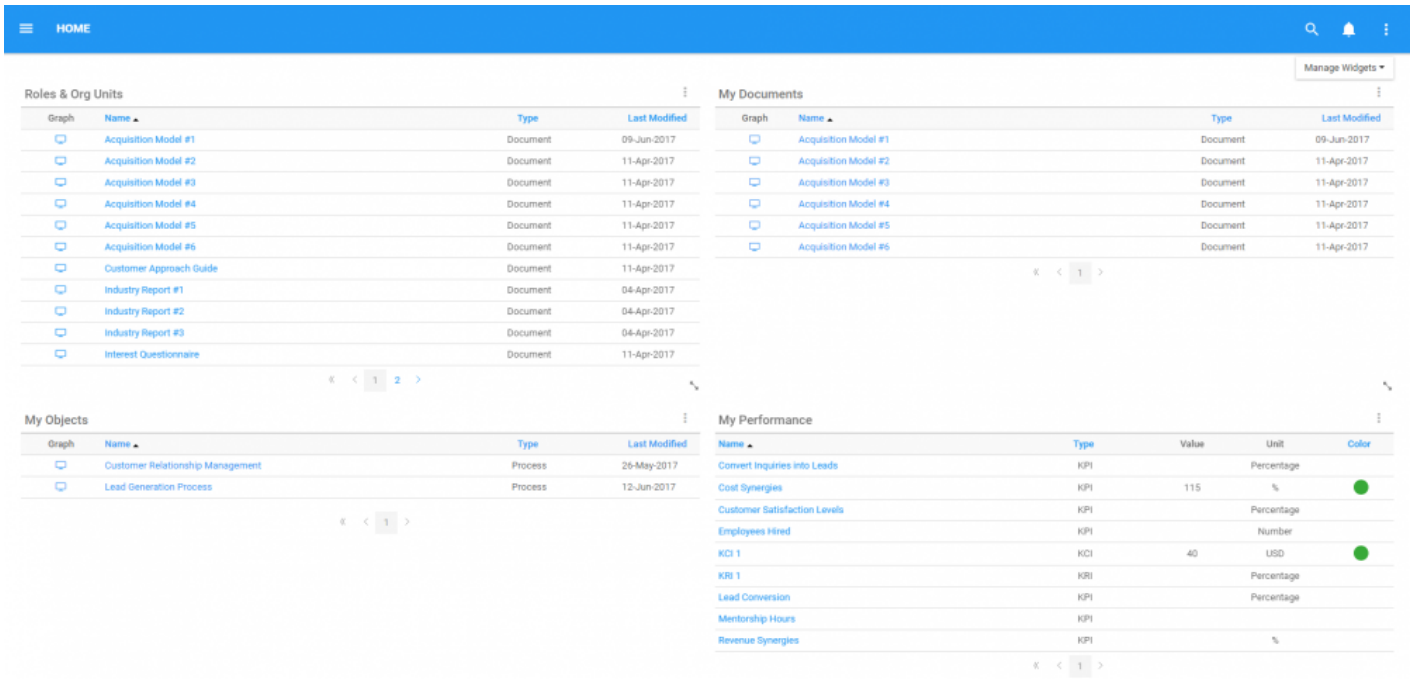
3.0 The Web App

The Web App is an integrated part of the Enterprise Process Center. The App presents a comprehensive view of the organization. All your activities and tasks are listed for you to manage and execute.

- Items requiring your specific approval are queued in the widgets.
- Collaboration is possible through discussion pages on every object in the EPC.
- Breakdown of the entire organization is laid out in detail in the modules.



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3.1 What is the Web App?

The Web App is your way to interact with the Enterprise Process Center (EPC). The App displays information that is relevant to and about your role, filtering information based on user preference and settings. By providing information that pertains to your day- to- day activities, the EPC keeps your daily activities streamlined and focused on what matters. This allows you to focus on completing activities and tasks and contributing to a more efficient and effective performance, without having to worry that you, or your staff, may be missing something important. Furthermore, the EPC provides managers with a governance tool to oversee the activity of their team members. This provides oversight, enhancing managerial capacity.

Where does all this information come from? The EPC is actually comprised of both the App(which you are using) and a Modeler section (used by process modelers). All the activities, documentation, support material and business concepts are architected using Modeler into comprehensive process models, where individual users, like yourself, are assigned things to do, or to approve, or to have access to for information purposes. The collaborative nature of the Web App is meant to not only provide information, but allow interaction with members of your organization, no matter where they are and to manage and provide audited records of all activities.

The EPC Web App is the primary means for employees to access processes and related documentation from any location worldwide via internet or intranet connections. The Web App enables users to participate in employee discussions and encourages all resources to provide input for continuous process improvements. With the Web App, users have their own personalized landing page of relevant information (processes, documents, dashboards). This keeps content relevant to them.

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3.2 What Can I do in EPC Web App?

The Web App displays all information that aids you in completing your job. You can access everything relating to your everyday tasks, activities, roles, documents and virtually any type of information that is relevant to your job, from the most important to the least significant information that crosses the organization.

As a starting point, the EPC App provides a means to view the processes you are involved in, allows you to easily collaborate with others who have been identified as relevant to your day-to-day activities, view reports that tell you how you are doing and how things are working around you, search for any activity that concerns you, and provides easy linkage to documents and other material that might need approving or might simply provide additional information on successfully completing your activities.

In the EPC App, you will be tied to things that relates to you or that you must act on. Users can be tied to a variety of content that requires their attention, action, or opinion on. The major items, or objects, that users can view are:

- Processes
- Documents
- Risks
- Organization
- Controls
- Materials
- Reports
- Workflow

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3.3 What is RASCI-VS?

RASCI-VS is a simple grid system that brings structure and clarity to understanding the roles people play within a team or a business unit. Using RASCI-VS ensures that everything that needs to be taken care of is. The RASCI-VS system, spells out who is responsible, who is accountable, who holds a supporting role; and, where appropriate, who needs to be consulted, informed, a verifier, and signatory of any activity. Knowing what your role is will guide you towards achieving your responsibilities in the tasks to be completed.

RASCI-VS provides the following benefits:

• Drive governance and traceability within an organization
• Increased productivity through well-defined roles and accountability.
• Increased capacity by eliminating redundancies.
• Streamlined role structure by collapsing unneeded layers and placing accountability where it belongs.
• Enhanced security and risk management through clear segregation of duties.

The acronym RASCI-VS stands for:

RASCI-VS	
Responsible	If you are a Responsible, you are the “doer” of the work. You must complete the task or objective or make a decision. Several people can be jointly Responsible.
Accountable	If you are Accountable you are the “owner” of the work. You must sign off or approve when the task, objective or decision is complete. Typically there should only be one person who is Accountable, and for that person, “the buck stops there.”
Support	Resources allocated to responsible. Unlike consulted, who may provide input to the task, support help complete the task.
Consulted	If you are Consulted you are someone who needs to give input before the work can be done and signed-off on. You are “in the loop” and are an active participant.
Informed	If you are informed you are someone that needs to be kept “in the picture.” You will need updates on progress or decisions, but you do not need to be formally consulted, nor do you contribute directly to the task or to any decisions.
Verified	Those who check whether the product meets the acceptance criteria set forth in the product description.
Signatory	Those who approve the verify decision and authorize the product hand-off. It seems to make sense that the signatory should be the party being accountable for its success.

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4.0 Navigating the Web App

Understanding how to navigate the App will optimize user experience. Outlined below is key information pertaining to various functions and actions that users will face within the EPC Web App.

Below is listed the following features that will be covered in the navigation section:

1. Logging In
2. Home
3. General Navigation
4. Process
5. Performance
6. Organization
7. Documents
8. Collaboration

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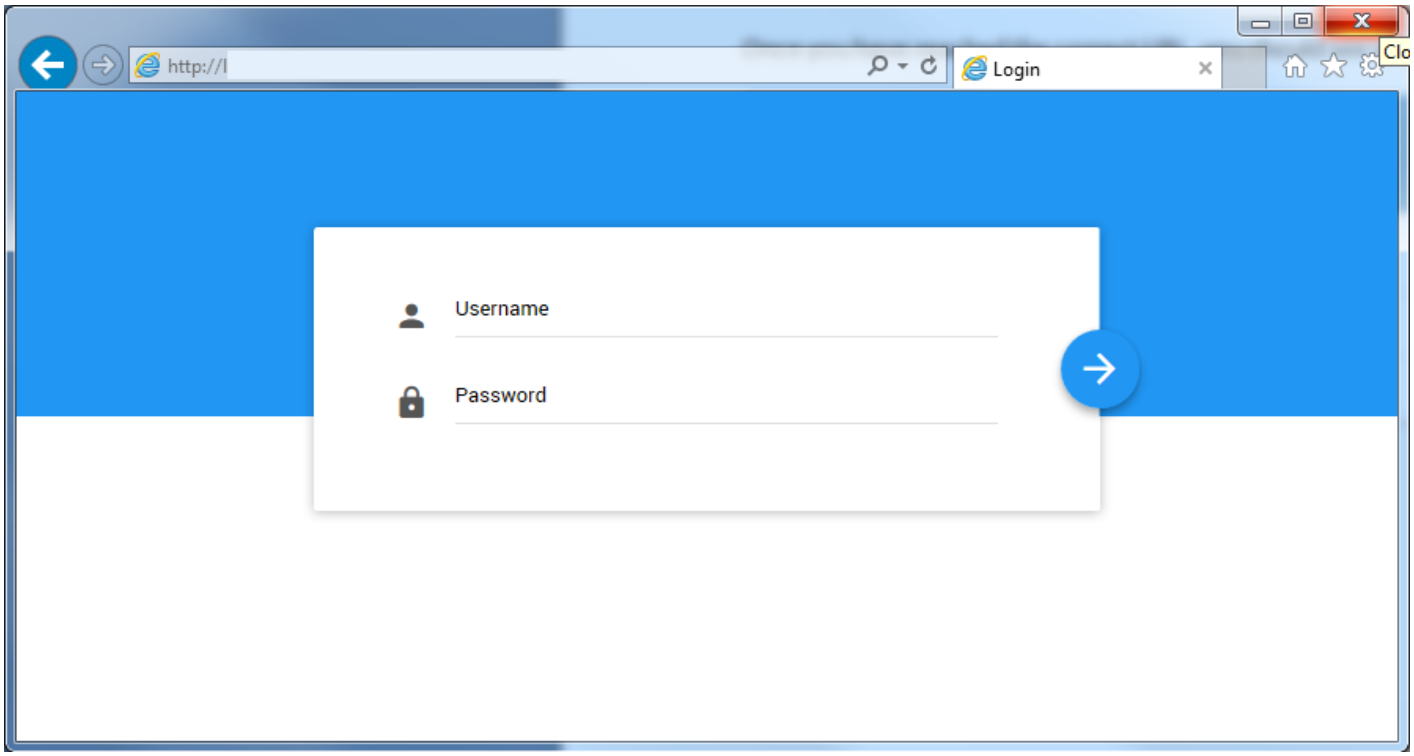
4.1 Logging in

Logging in is the entry point for the EPC Web App.

1. To access the login page for EPC 10, you must type the corresponding URL in your preferred browser. This URL is company specific. Therefore you must contact an EPC administrator to obtain the correct URL.
2. Once you have reached the correct URL, you should see a login page as show below.
3. Enter your Username and Password for EPC.
4. Press [Enter] on your keyboard or click on the button on the page.



You can also choose to show you password on the login screen to ensure you've typed it correctly.

1. Type your username.
2. Type your password.
3. Click on to the right of the password field.
4. You should now see the password you have typed.

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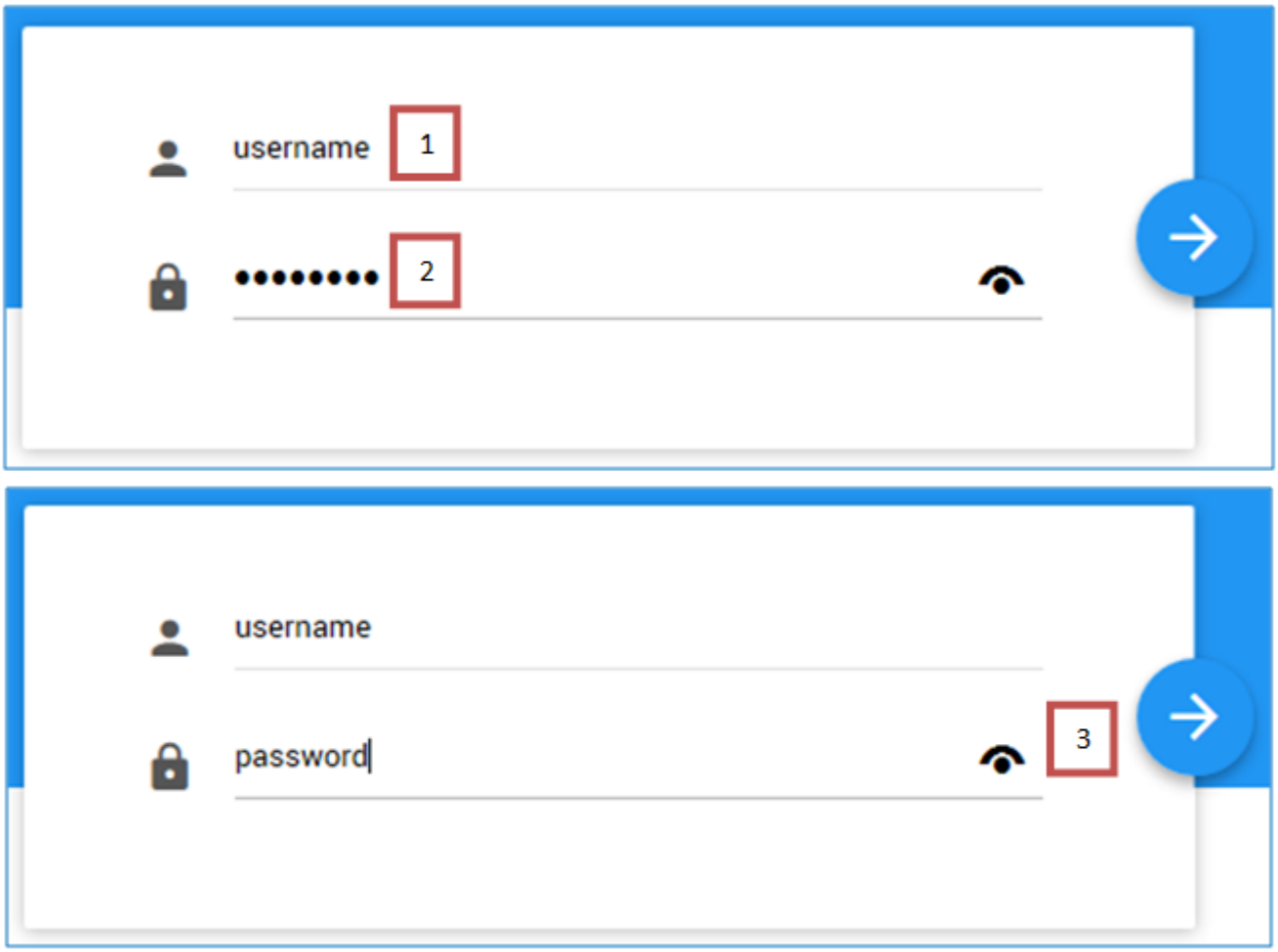

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4.1.1 Integrated Login (SSO)

Clients can opt for integrated login process. This option, enabled by System Administrators, will use existing Windows authentication to automatically log users into their profiles.

This option must be enabled and implemented by System Administrators. Please contact your System Administrators for further details.

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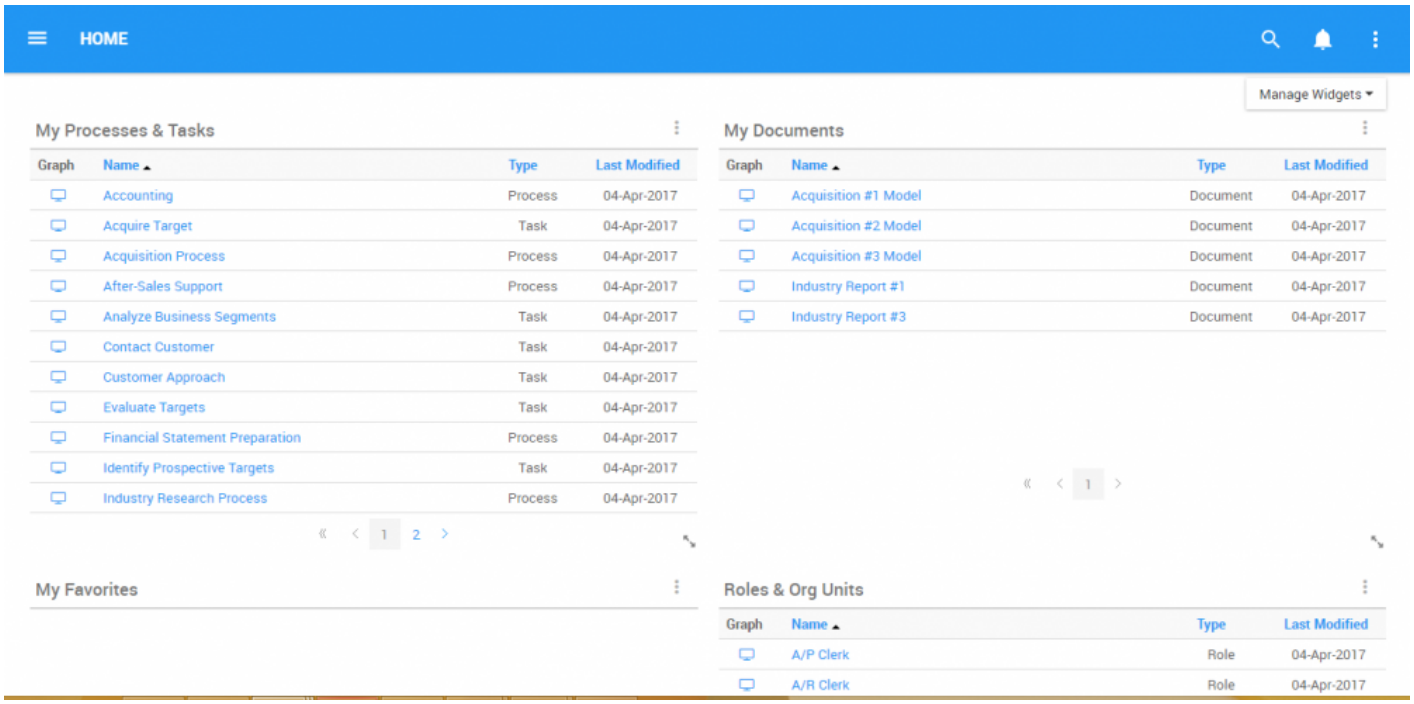
4.2 Home

When you login to the EPC Web App, you will be directed to the Home page by default. Here, you can add and customize various widgets related to EPC objects (Processes, Documents, Performances, etc.). It is encouraged to customize your individual home page based job requirements and personal preferences.

Users can set up to an unlimited number of customized Widgets to be featured on their Home page.

Users can also be provided with a Default Widget set, implemented by System and Environment Administrators.



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4.2.1 Widgets

Widgets are small information windows that fetch and display EPC information in meaningful ways based on your preferences. What and how they display the information is fully customizable. Furthermore, you can have multiple widgets on your home page and you can place them in the order that best suits your needs.

Users can set and customize 3 different types of Widgets.

Widget	Description
My Objects	A Widget window used to feature any object within the EPC. These items can be processes, process components and/or associated items. This Widget can feature: 1. Asset 2. Document 3. End 4. Gateway 5. Intermediate 6. Objective 7. Org Unit 8. Process 9. Report 10. Resource 11. Role 12. Start 13. Task 14. Key Performance Indicators (KPIs) 15. Key Control Indicators (KCIs) 16. Key Risk Indicators (KRIs)
My Performance	A Widget window allowing users to feature company, department and personal Performance Measures. This Widget can feature: 1. Key Performance Indicators (KPIs) 2. Key Control Indicators (KCIs) 3. Key Risk Indicators (KRIs)
My Actions	A Widget window allowing users to feature items they are actively engaging with. These are items that users act upon, or are requiring their action. This Widget can feature: 1. Objects Pending my Review and Approval 2. Objects Pending my Confirmation 3. Improvement Requests Pending my Review and Approval 4. Improvement Requests Pending my Implementation 5. Improvement Requests Waiting for Publish

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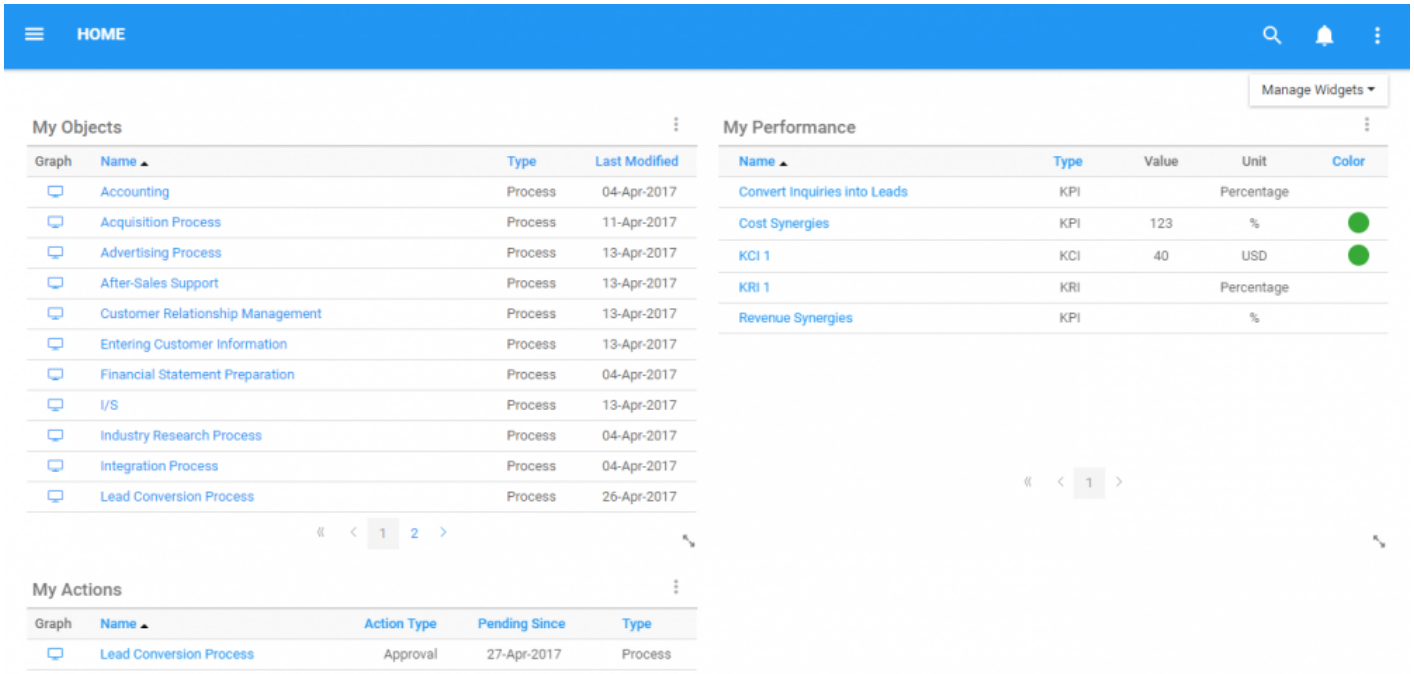
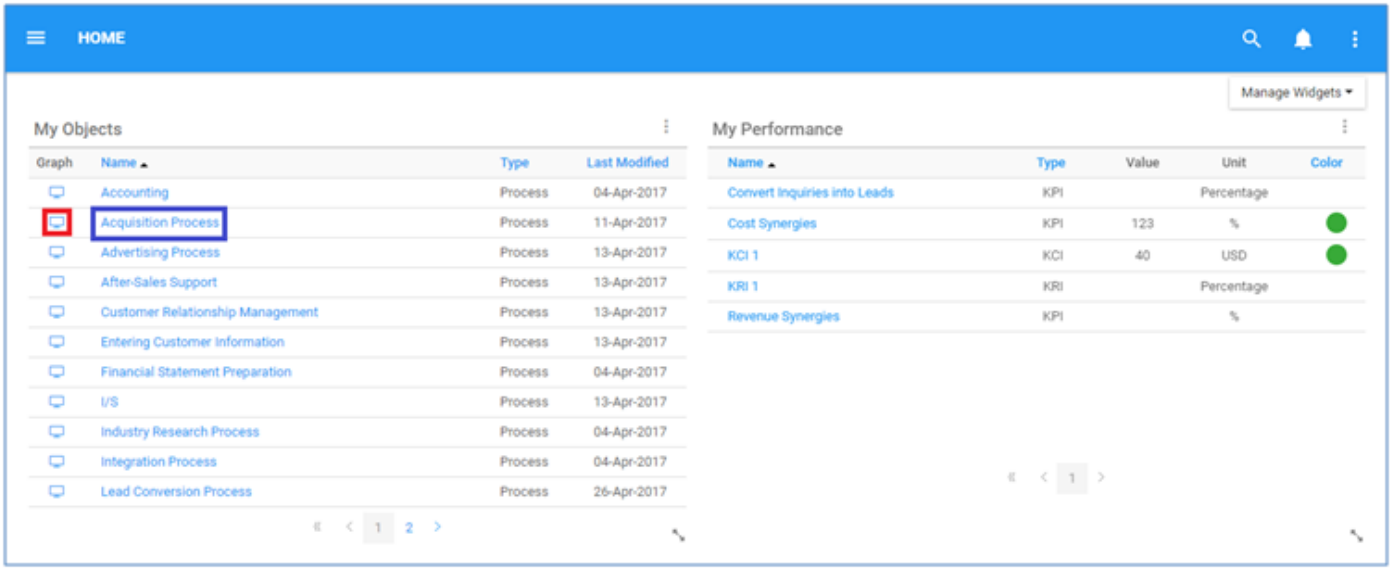
Widget Navigation

Upon Navigating to a user's Home page, users will be greeted with their Widgets



Users can navigate directly to any items within these Widgets. Users can navigate to the item's Graph page by selecting the icon outlined in red. Users can also navigate to the item's Details page by clicking on the name of the item, outlined in blue.



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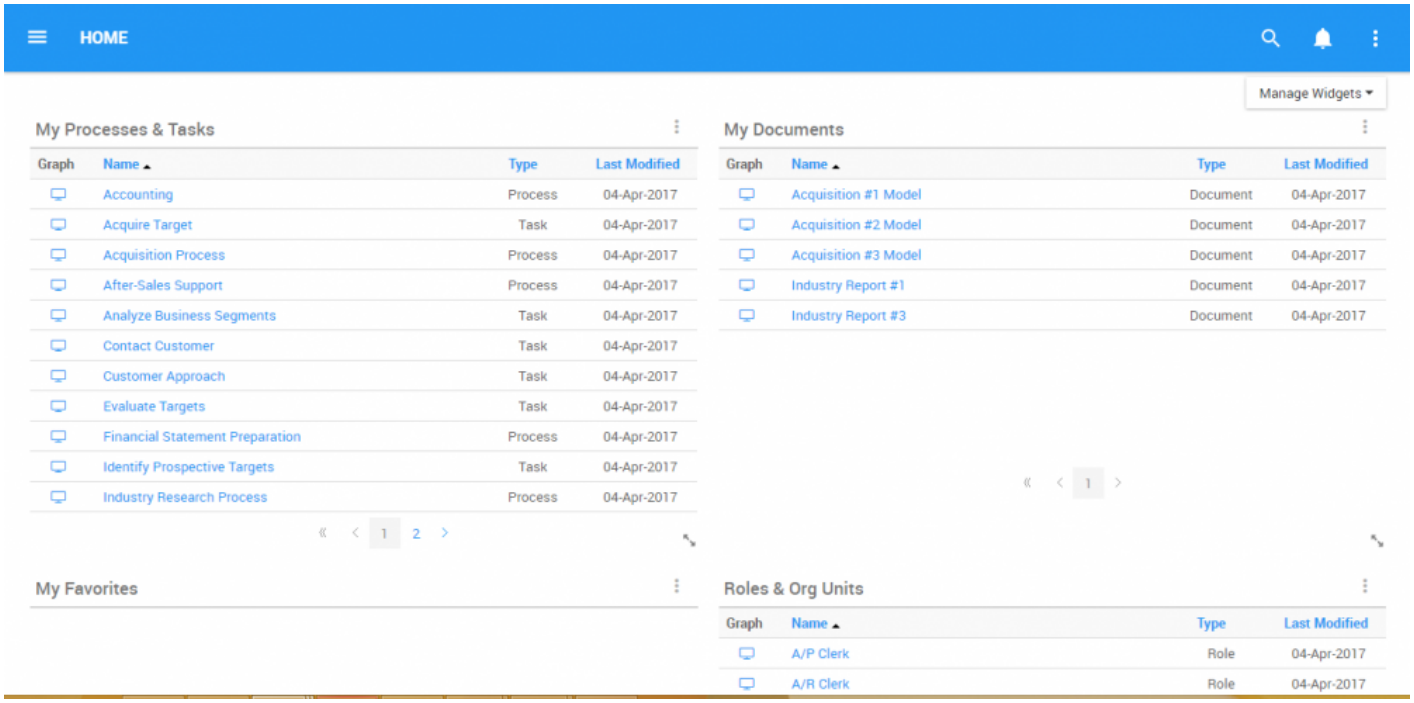
4.2.1.1 Default Widgets

System Administrators will set default widgets for users based on their forecasted needs. It is still encouraged to customize these widgets based on job requirements. Users can also reset their homepages to the default standard. Please see **How to Reset Default Widgets** below for instructions on how to reset default Widgets.



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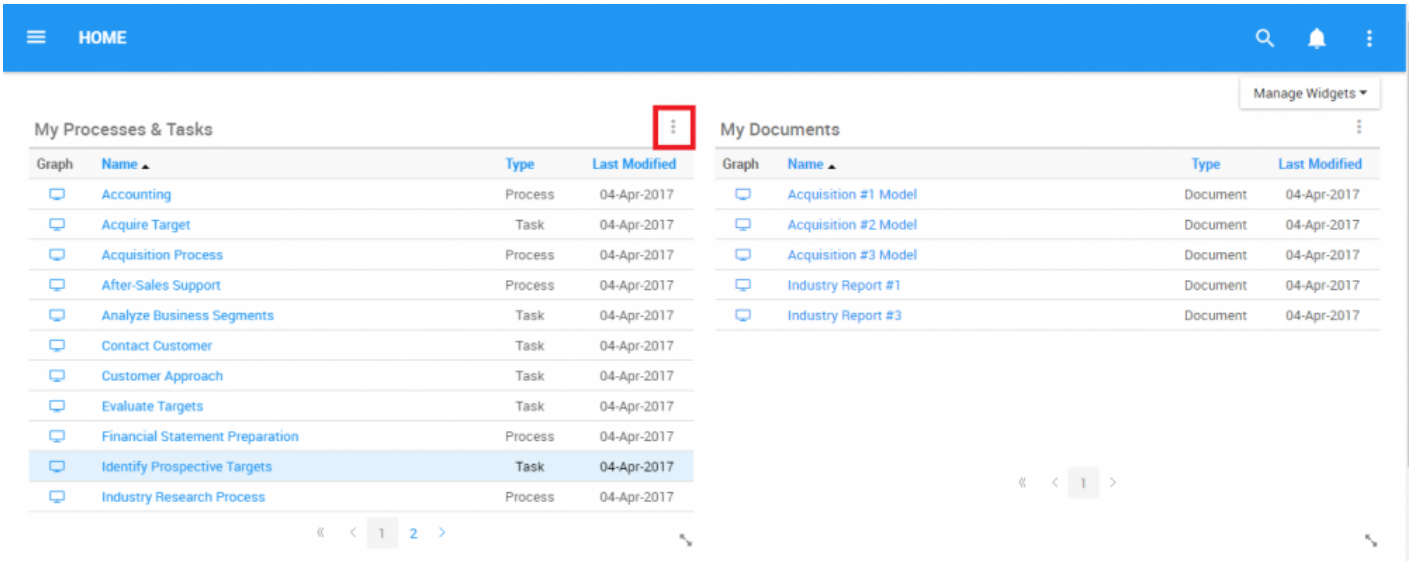
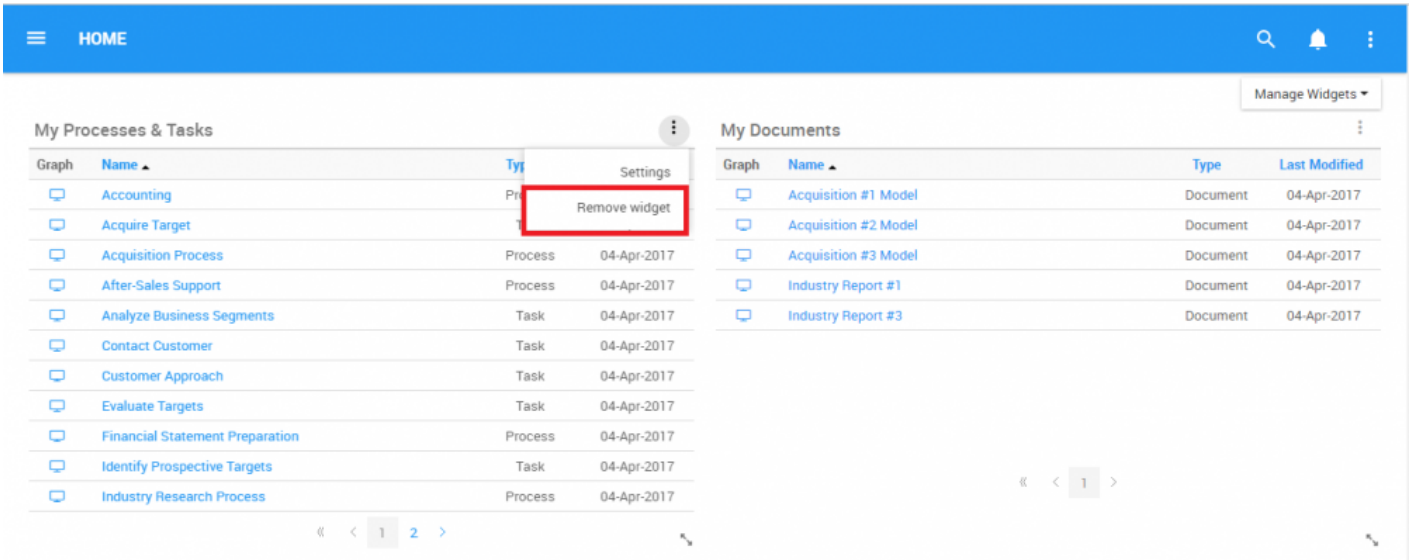
4.2.1.2 How to Remove Widgets from Home Page

Outline below are the steps required to remove Widgets from your Home page;

1. Navigate cursor to icon on the upper right corner of a specific widget



2. Select the icon which will generate a drop down menu with the “Remove widget” button appearing



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3. Click the “Remove widget” option and the Widget will be removed from the Home page

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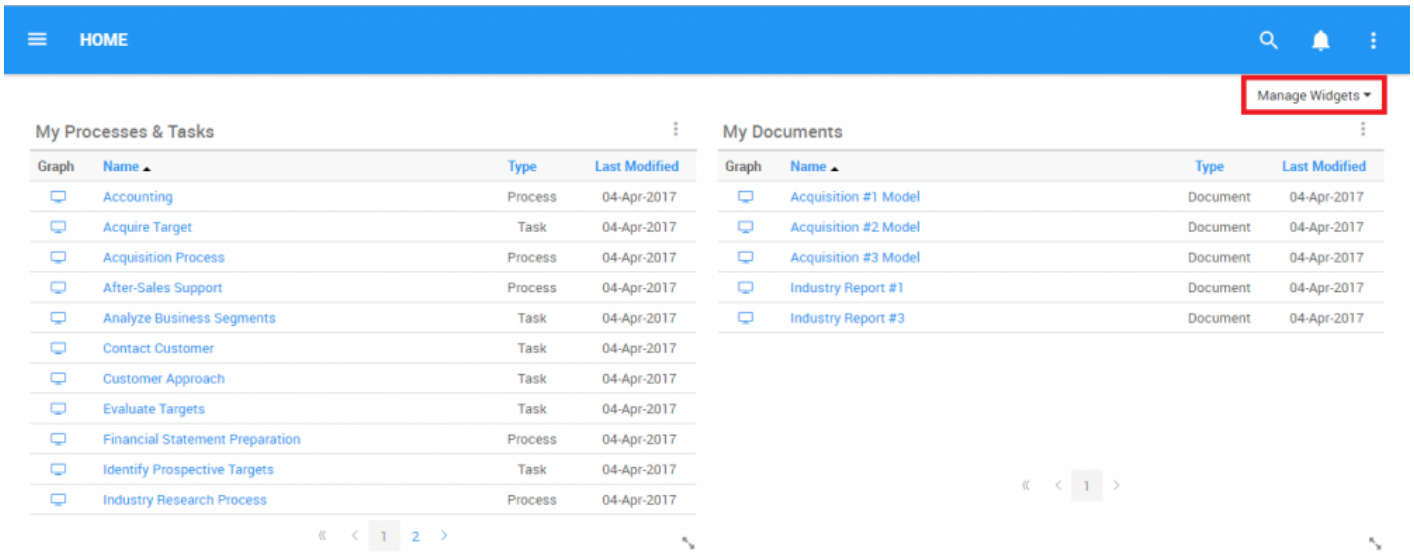
4.2.1.3 How to Add Widgets from Home Page

Outlined below are the steps required to add Widgets from your Home page;

1. Navigate cursor to the

icon listed in the top right corner of the Home page



2. Select the “Manage Widgets” option and it will generate a drop-down menu and select

icon and you will be prompted with a second drop-down menu

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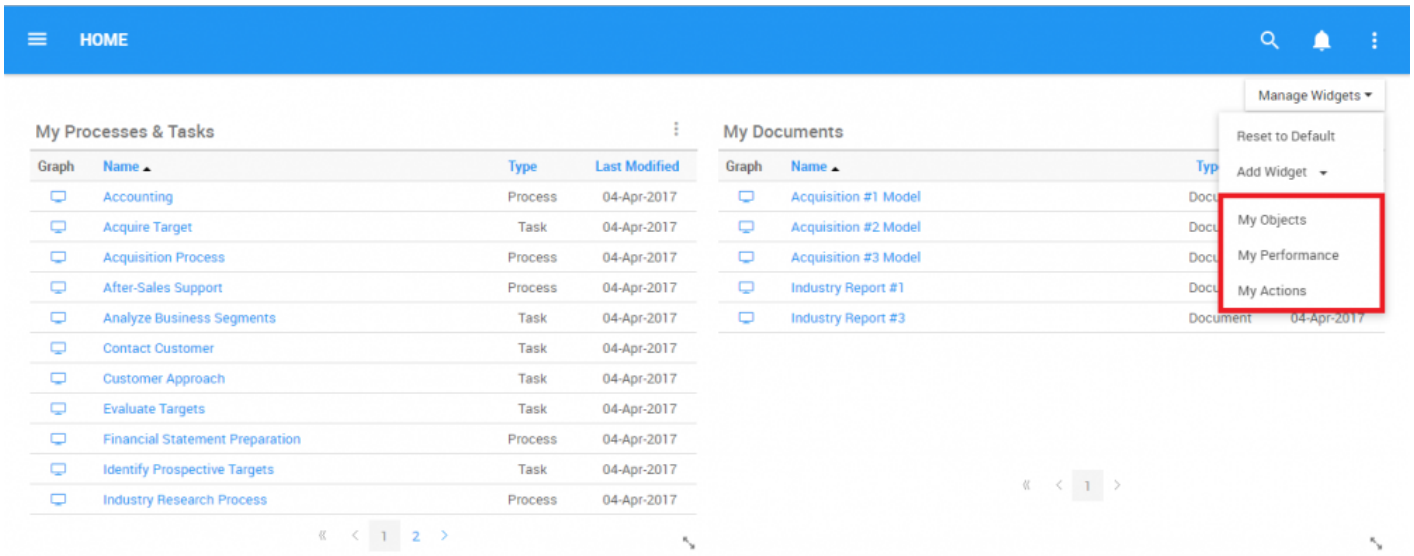
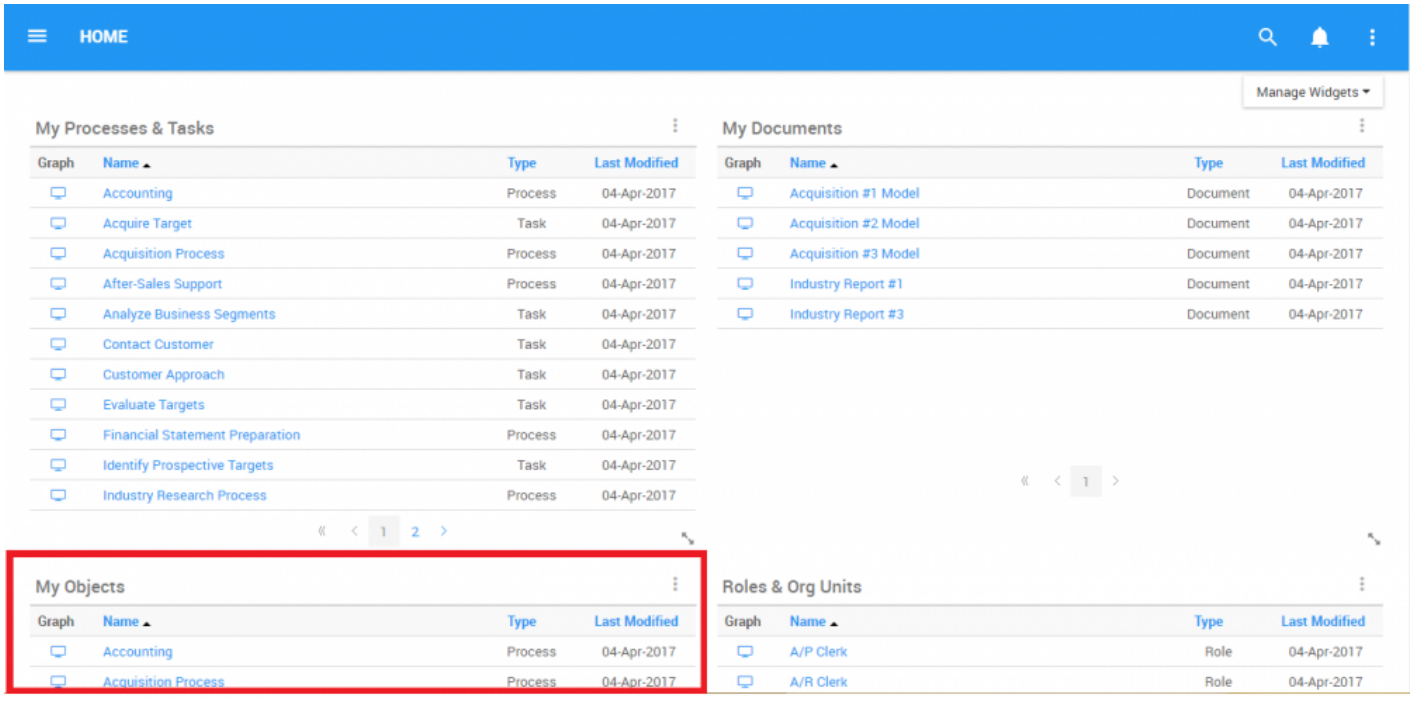


3. Select the Widget you would like to add to your Home page, for this example, click on the “My Objects” option to add “My Objects” to your home page. The Widget will be generated on your page in 1 of the available panels



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4.2.1.4 How to Customize Widgets

Users can customize both the Widget type, and the items that the widget features. Below is a table listing the widget types available to end users as well as the available items for these widgets

System Administrators will set default widgets for users based on their forecasted needs. It is still encouraged to customize these widgets based on job requirements. Users can customize their:

1. My Objects Widget
2. My Performance Widget
3. My Actions Widget

Users are provided a variety of criteria and filters that allow these Widgets to be customized. When these filters are used and combined, they follow 2 general rules.

Rule	Description
AND	AND clauses allow users to examine information with greater depth by providing more filters for data being queried. The result of using filters with AND clauses are that less data will be featured in the Widget.
OR	OR clauses allow users to examine information with greater scope by providing users with data that meets various sets of criterion. The result of using filters with OR clauses are that more data will be featured in the Widget.

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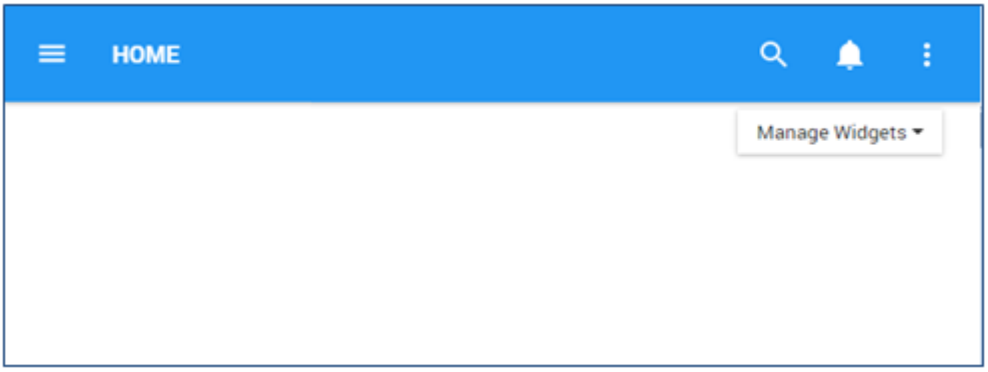
4.2.1.4.1 Customize My Objects Widgets

The “My Objects” window allows users to view any objects associated to the processes they are tied too within the EPC. Customizing “My Objects” will allow users to view multiple different object types in one or multiple Widget windows based on personal preference.

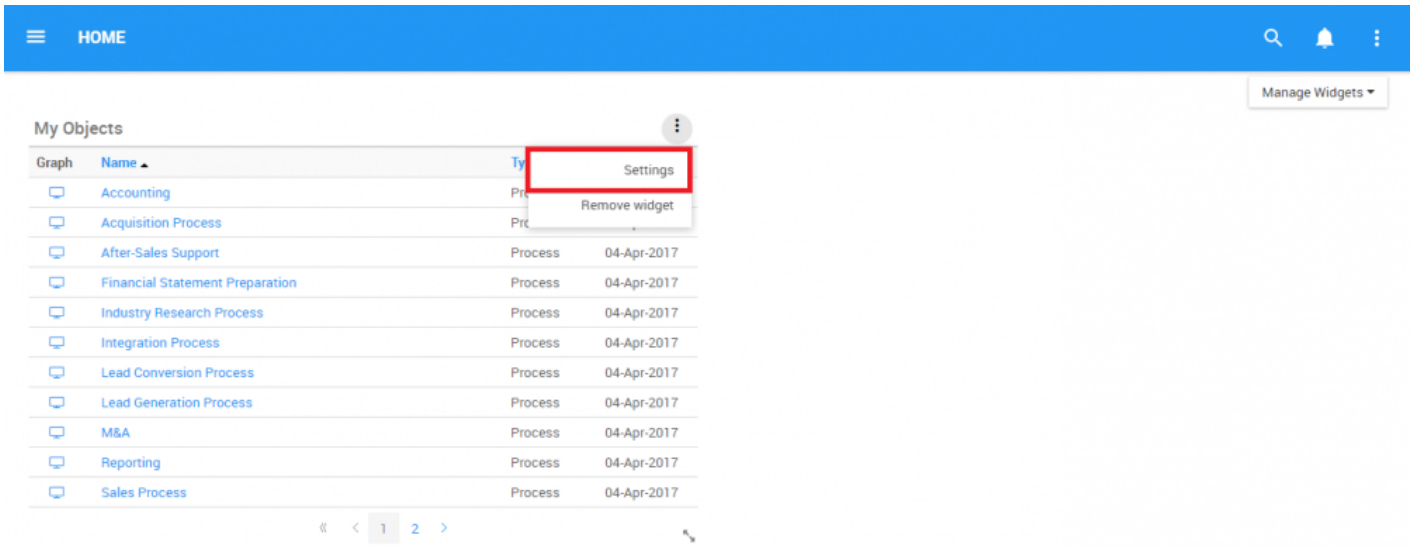
Please follow the instructions below to customize the “My Objects” Widget.

1. Upon login, you will be greeted with the following page:

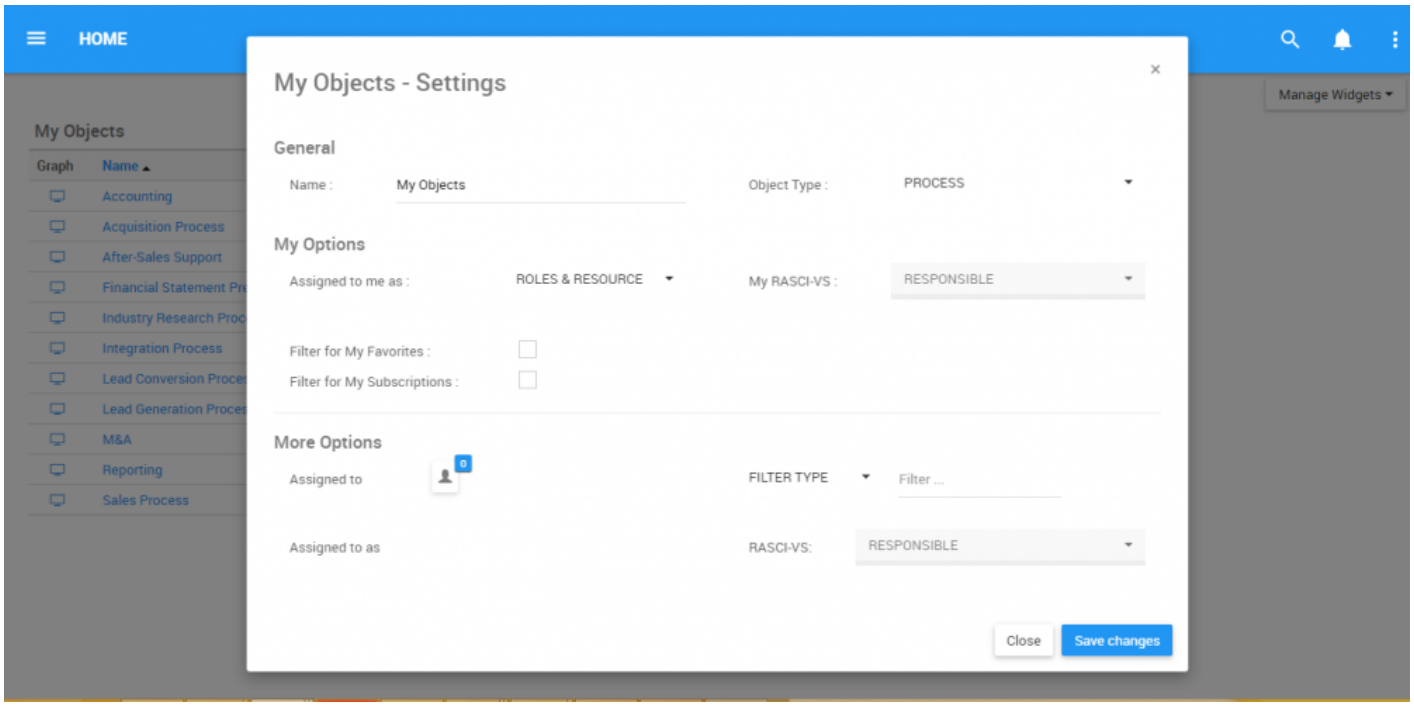


2. To add widgets to your home page, next you navigate to the “Manage Widgets” and add the “My Objects” Widget. (Please see How to add Widgets from Home page above for further detail).

3. Once the “My Objects” Widget has been added to the Home page, select the icon at the top right corner of the Widget and select the Settings option.



4. Click on the “Settings” option and a pop-up window will be generated as follows



In this page there are a number of parameters that a user can customize to improve user experience.

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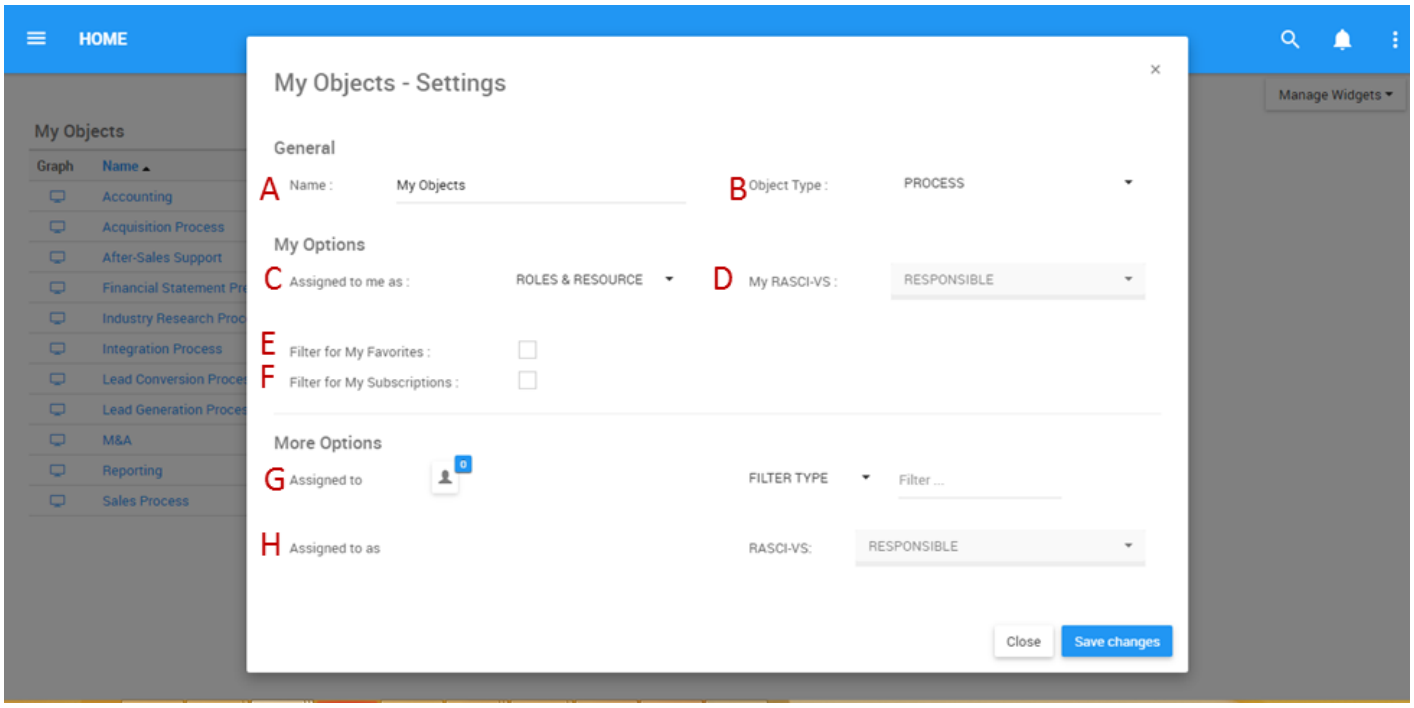

Item	Setting	Purpose
A	Name	Allow user to customize the title of the Widget.
B	Object Type	The primary filter of the “My Objects”. Allow users to select a specific object type to be featured.
C	Assigned to me as	Allow users to filter through their assigned Roles and Resources.
D	My RASCI-VS	Allow users to organize their Roles and Resources based on their level of involvement.
E	Filter for My Favorites	Allow users to sort specific objects by favorites vs. non-favorites.
F	Filter for My Subscriptions	Allow users to sort specific objects by subscribed items.
G	Assigned to	Allows users to filter objects that are indirectly related to an individual’s personal Roles and Resources.
H	Assigned to as	Further criterion helping users view filter objects indirectly relating to personal Roles & Resources. Allows users to filter indirect relationships based on RASCI-VS criterion.

You may select **MULTIPLE** items, objects and settings. Doing so will allow a user to feature more content within a specific widget.

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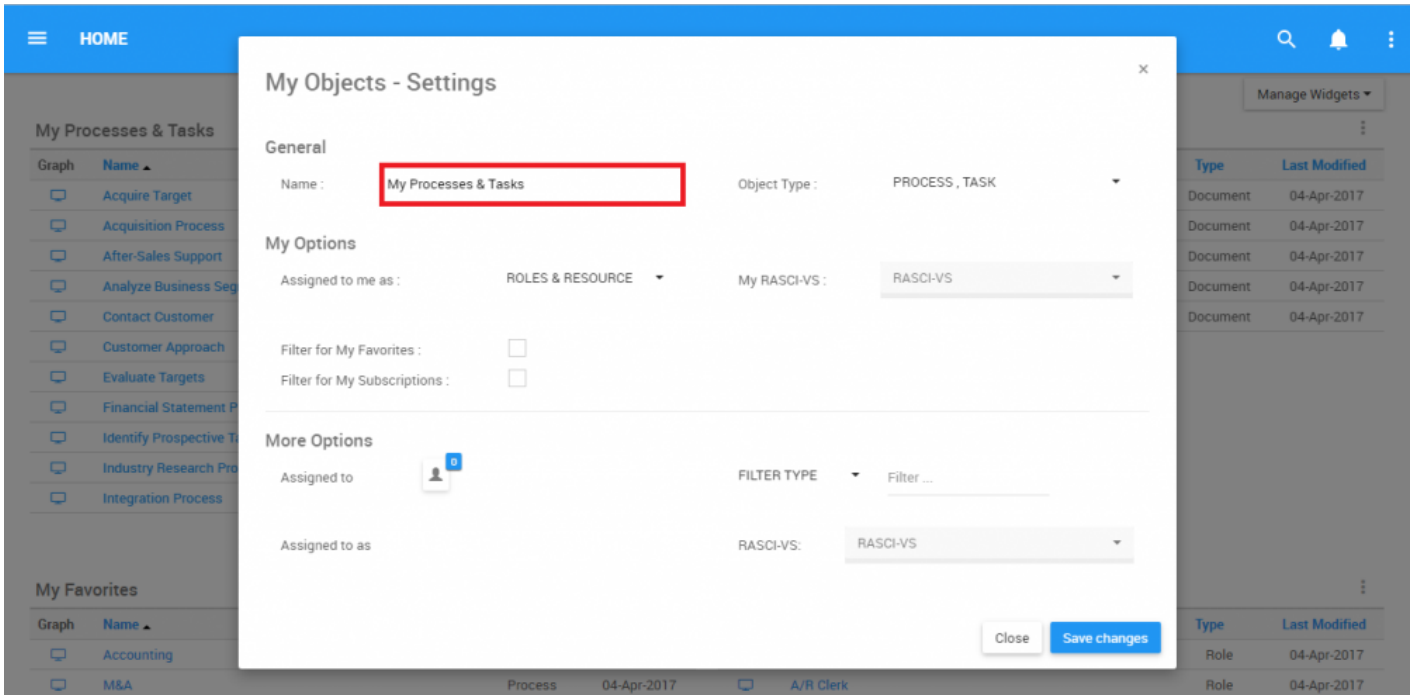
A. **Name:** The “Name” Section will allow a user to customize the name of the Widget. To edit the “Name” section, please follow the instructions below

i. Navigate cursor over existing name box



ii. Edit name by selecting name box and typing in desired name

B. **Object Type:** The Object Type is the primary filter when customizing the “My Objects” Widget. This filter should be set first, as all subsequent items are derivative of the Object Type. To select objects to be featured in a Widget, use the “Object Type” field and follow the instructions below:

i. Navigate cursor over the object type task bar

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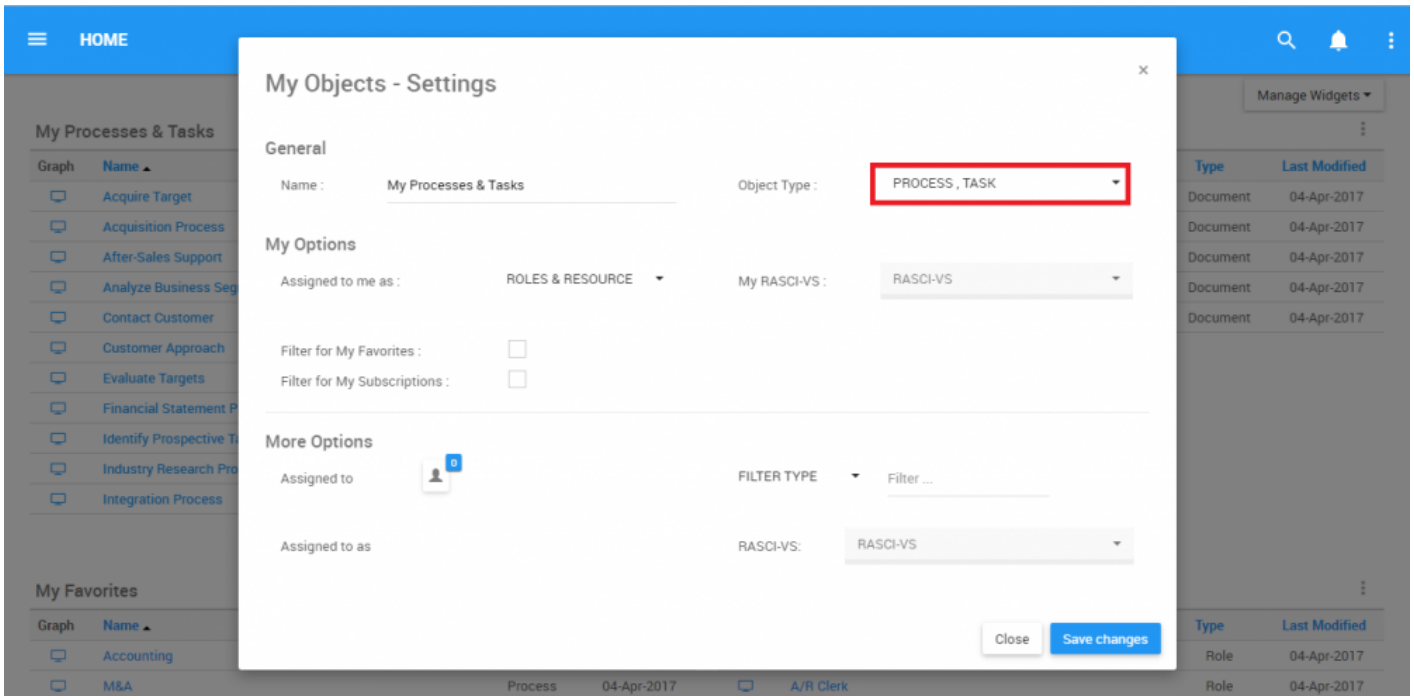
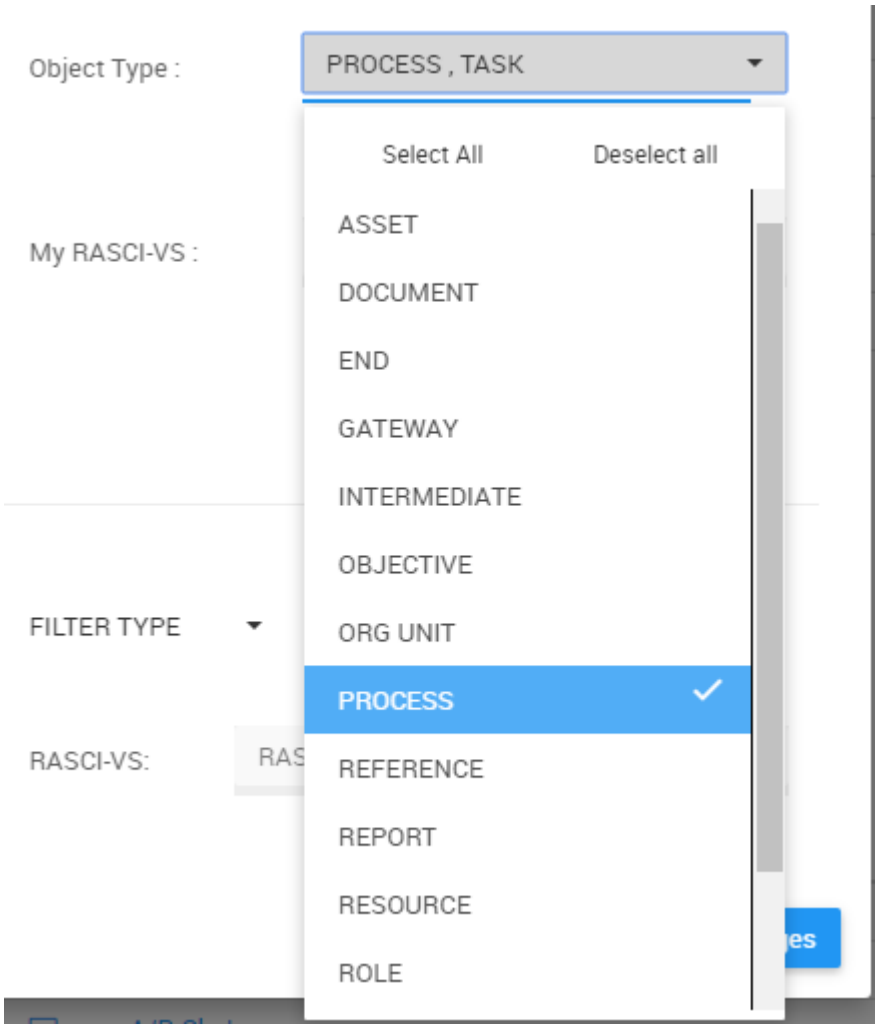
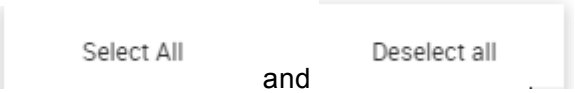


ii. Click on the task bar, which will generate a drop-down menu



iii. Select/Deselect desired object(s) to be featured in Widget window by navigating cursor and clicking on respective objects. Additionally, the drop-down menu features  and buttons that can be used for mass selection.

> You may select **MULTIPLE** Objects to be featured in individual Widgets.

C. **Assigned me to as:** Roles will be assigned to users by EPC Modelers. Individuals can be assigned one or multiple roles, depending on their versatility within an organization. The reason individuals are often assigned multiple roles that do not necessarily mirror their job contract is to effectively segregate processes while providing appropriate levels of governance.

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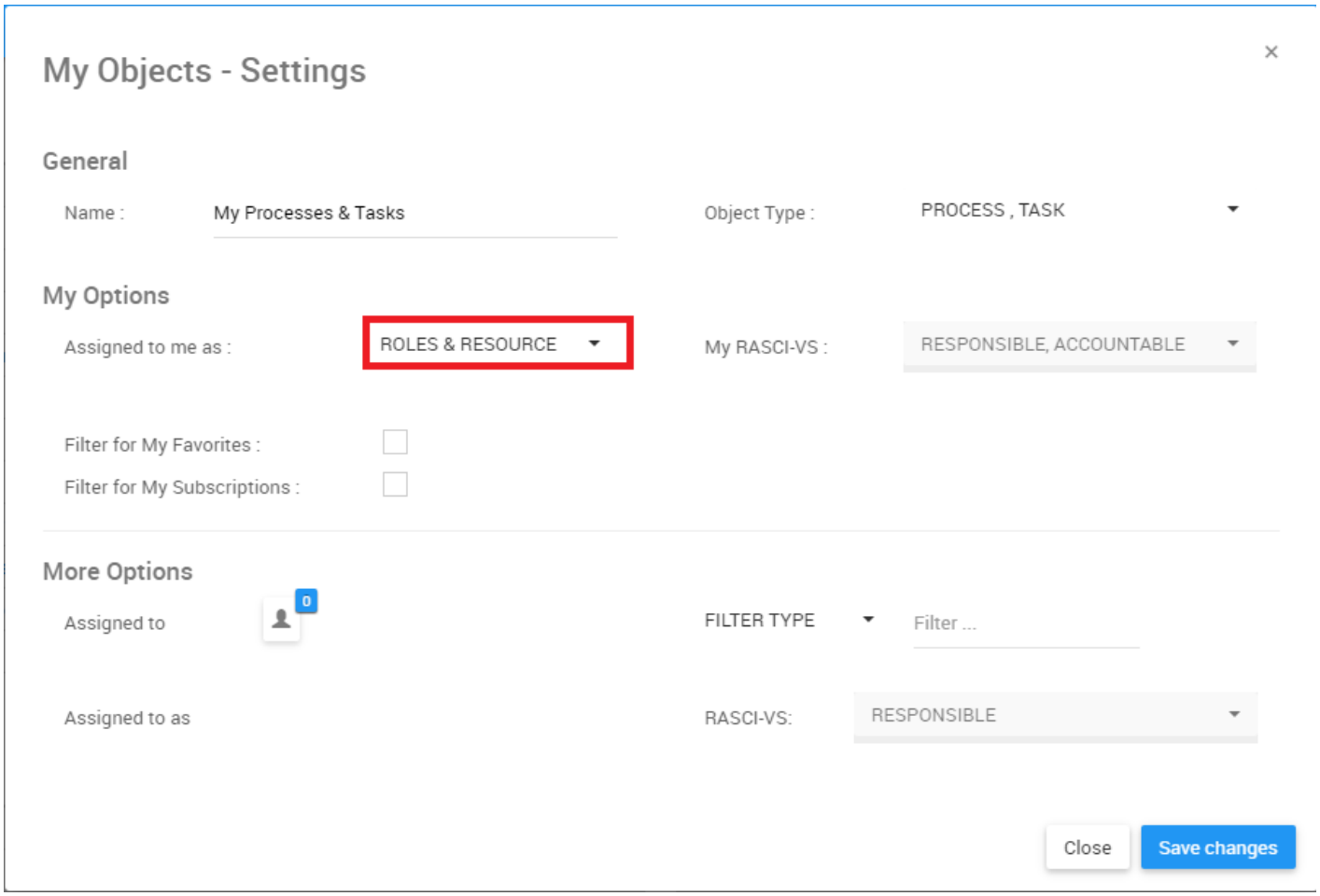
Example: if an employee works primarily as an HR Coordinator, but also works as an Event Planner for the organization they will be assigned both positions within the EPC, regardless of the specific job title on an individual's contract.

Once roles have been assigned to users, they will appear in the following section:



The drop-down list will feature all of the roles and resources that the Web App user has been assigned. As seen below, the list for this specific user is populated with 2 roles (Acquisition Specialist and Sales Director) and with his specific resource profile (Tim Shaw).

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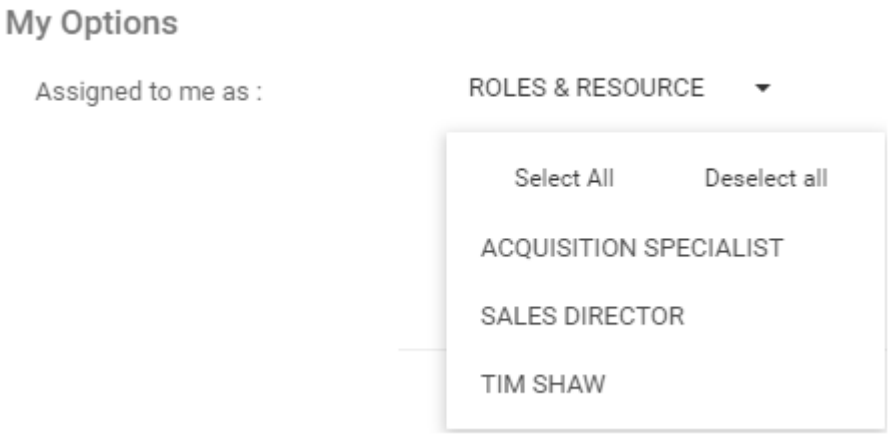
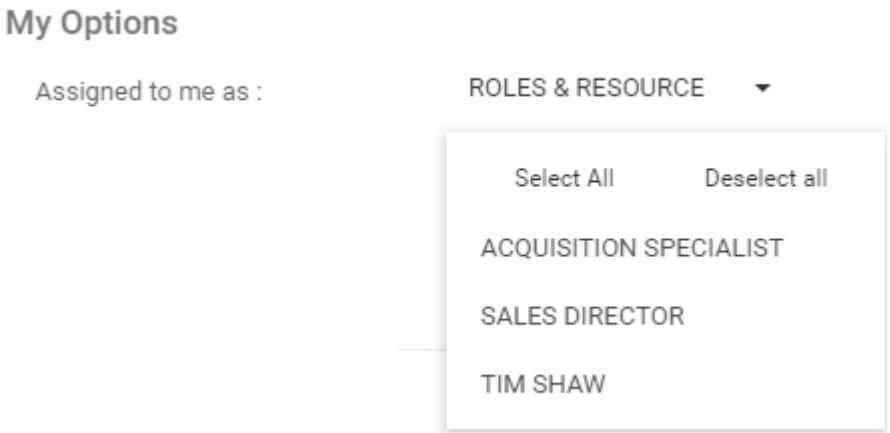


Users can select one, or multiple options to better filter the information within the widget. To select these Options, please see the steps below:

i. Select the “Assigned to me as” Task bar

ii. This generate a drop-down menu



iii. Select the Role or Resource you would like to feature in the Widget by clicking on the item in the list

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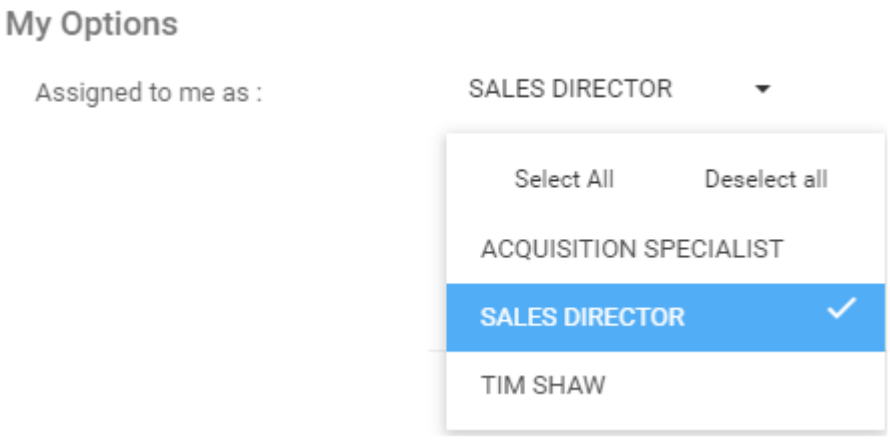
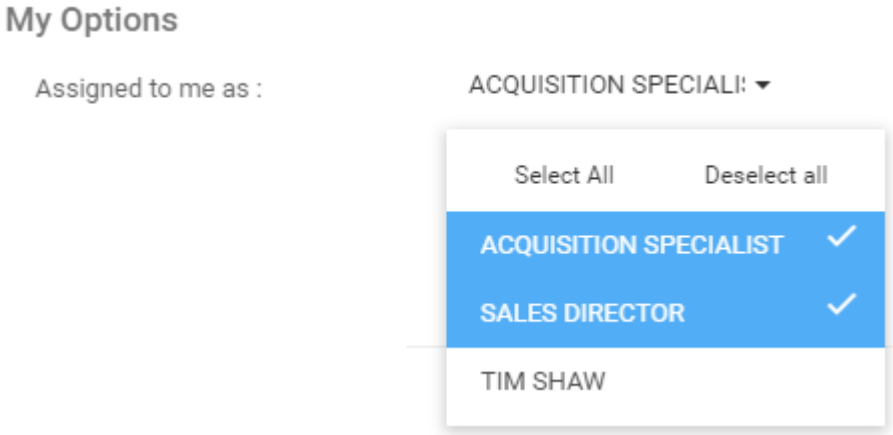


iv. (Optional) to select multiple roles and resources, simply repeat step iii



Users can be assigned multiple roles within an organization. This is a common case in dynamic organizations with diversely-skilled workers.

D. **My RASCI-VS:** The My RASCI-VS filter allows users to filter through their assigned roles and resources and prioritize them based on their involvement in accordance with the RASCI-VS Matrix. This filter allows users to create Widgets categorized based on their level of involvement.

R – Responsible
A – Accountable
S – Support
C – Consulted
I – Informed
V – Verified
S – Signatory

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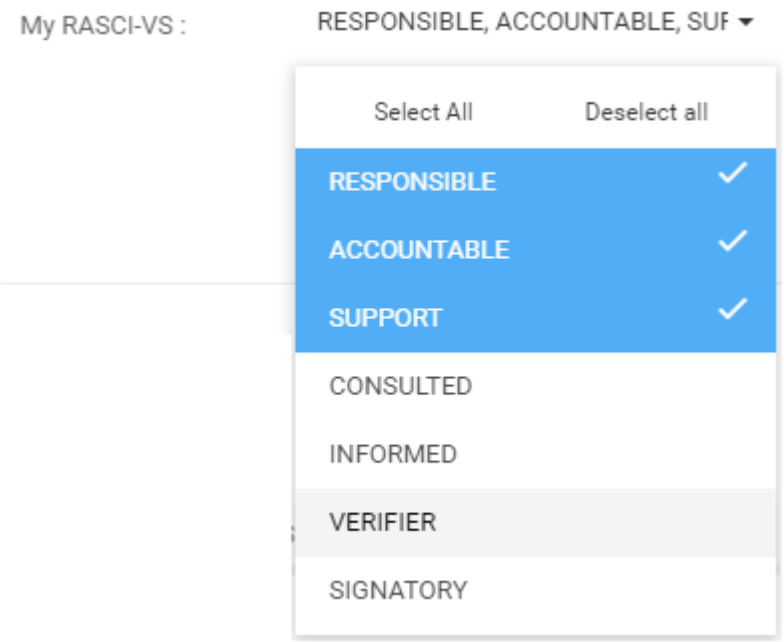
Please see **My RASCI-VS** section above for detailed explanation of the RASCI-VS Matrix in Section 3.4.

Users can select multiple different filters should a user want to include more information within the given Widget.



The RASCI-VS selection will be **locked** until a user has selected a Role or Resource in the "Assigned to me as" section. Upon selecting a (or multiple) Roles and Resources, a user will be able to filter objects with the RASCI-VS criterion

E. **Filter for My Favorites:** In order to help users prioritize information for users, a "Filter for My Favorites" section can be used. Users can select the "Filter for My Favorites" option, and Widget will feature only the specific objects that are favorited by a user.

i. To "Filter for My Favorites" , navigate cursor over tic-box

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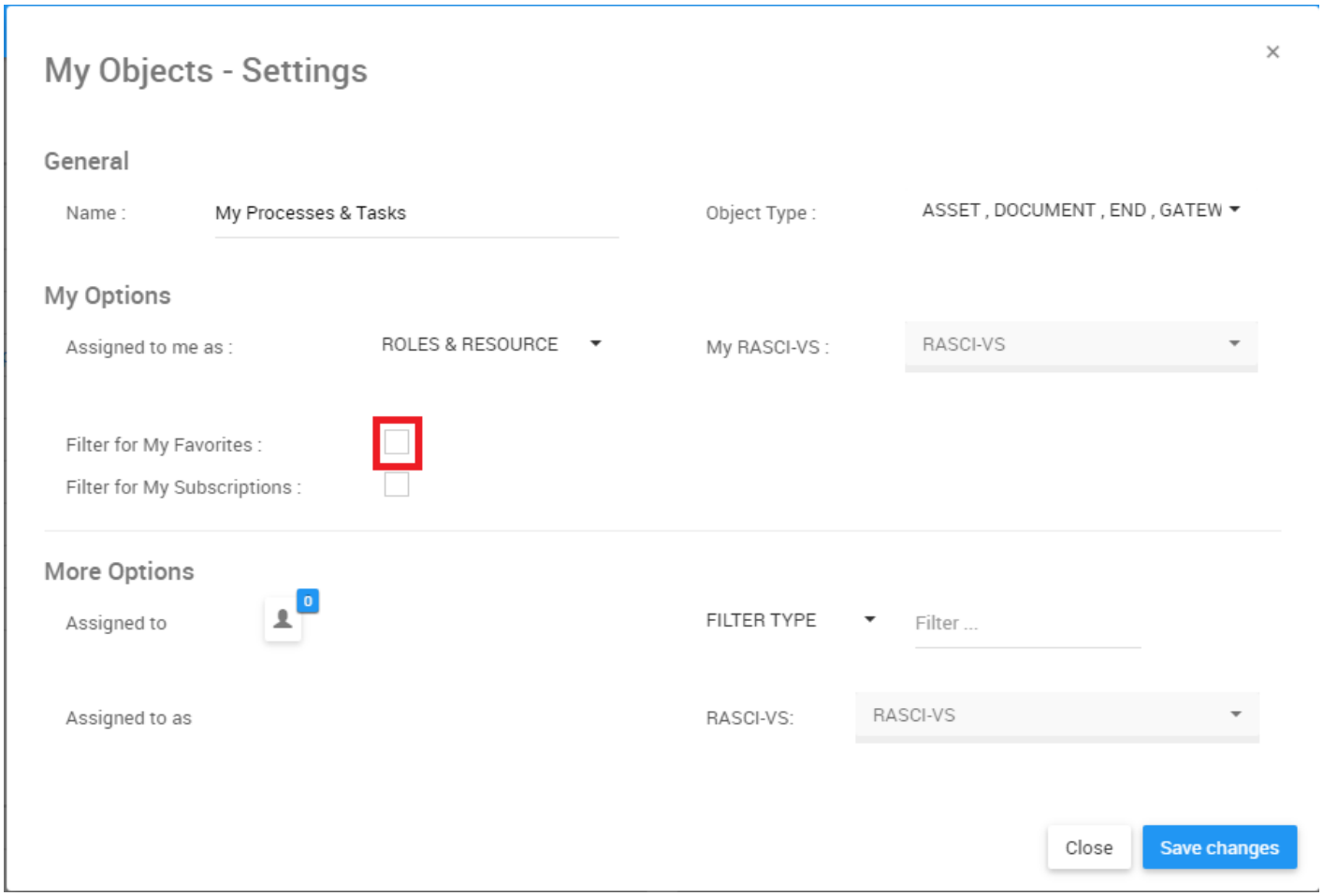
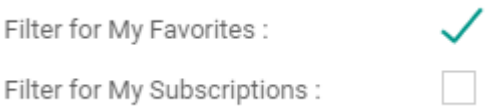


ii. Select option by clicking on box. This will generate a green checkmark to confirm that option has been selected



F. **Filter for My Subscriptions:** In order to help users prioritize information for users, a “Filter for My Subscriptions” section can be used. Users can select the “Subscriptions” option, and Widget will feature only the specific objects that the user is subscribed to.

i. To “Filter for My Subscriptions” , navigate cursor over tic-box

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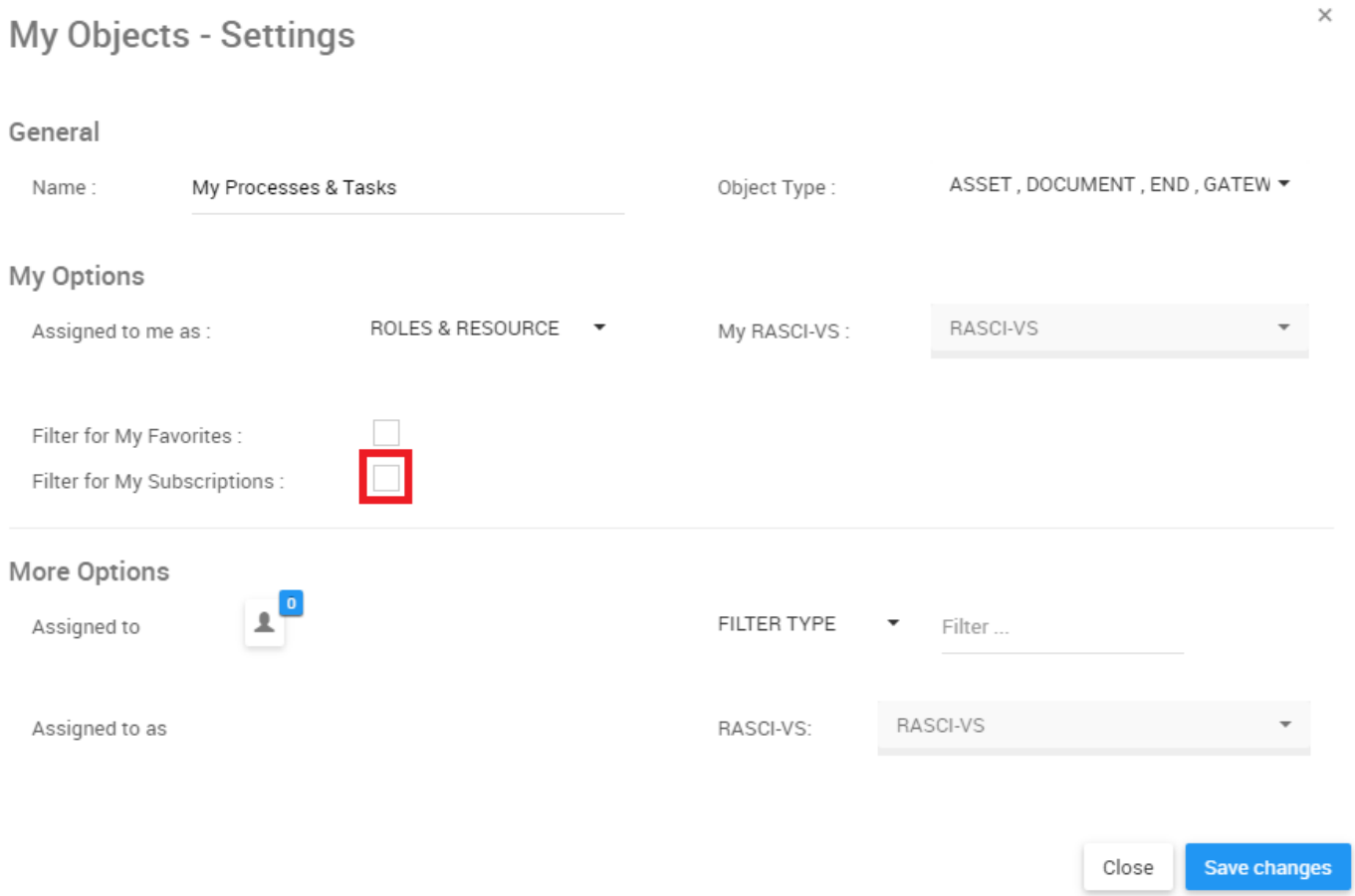
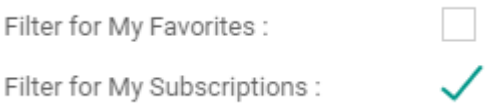


ii. Select option by clicking on box. This will generate a green check mark to confirm that option has been selected



G. **Assigned to:** This filter is designed for users to view Objects that are associated with specific Roles and Resources. This allows users to see which objects relate to different people and roles within the organization.

Using this filter will extend the scope an individual user can have within the organization.

To user the “Assigned to” filter, please see the following steps

i. Navigate to the My Objects – Settings page

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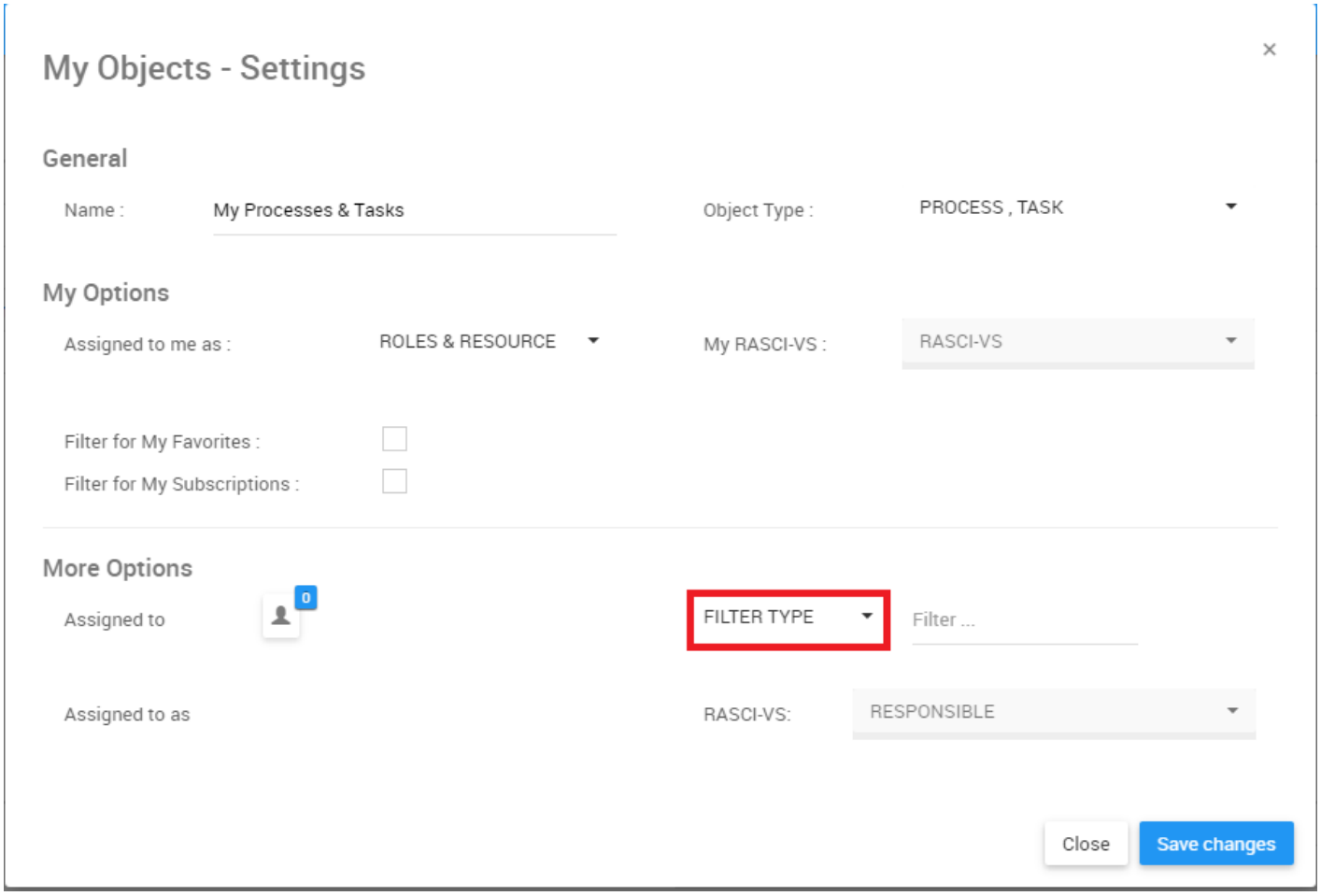
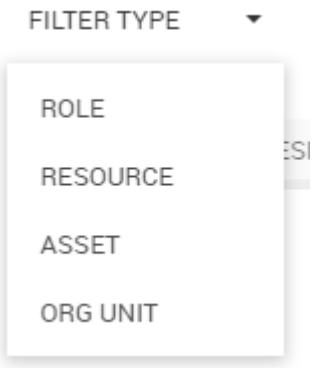
ii. Select the “Filter Type” drop-down menu



iii. A drop-down menu will be automatically generated



iv. Select the desired filter. Note that multiple filters can be selected.

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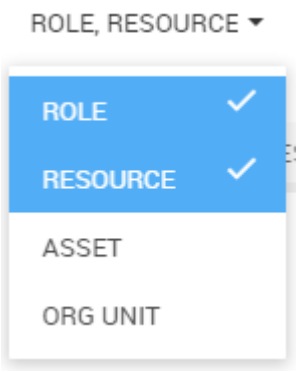
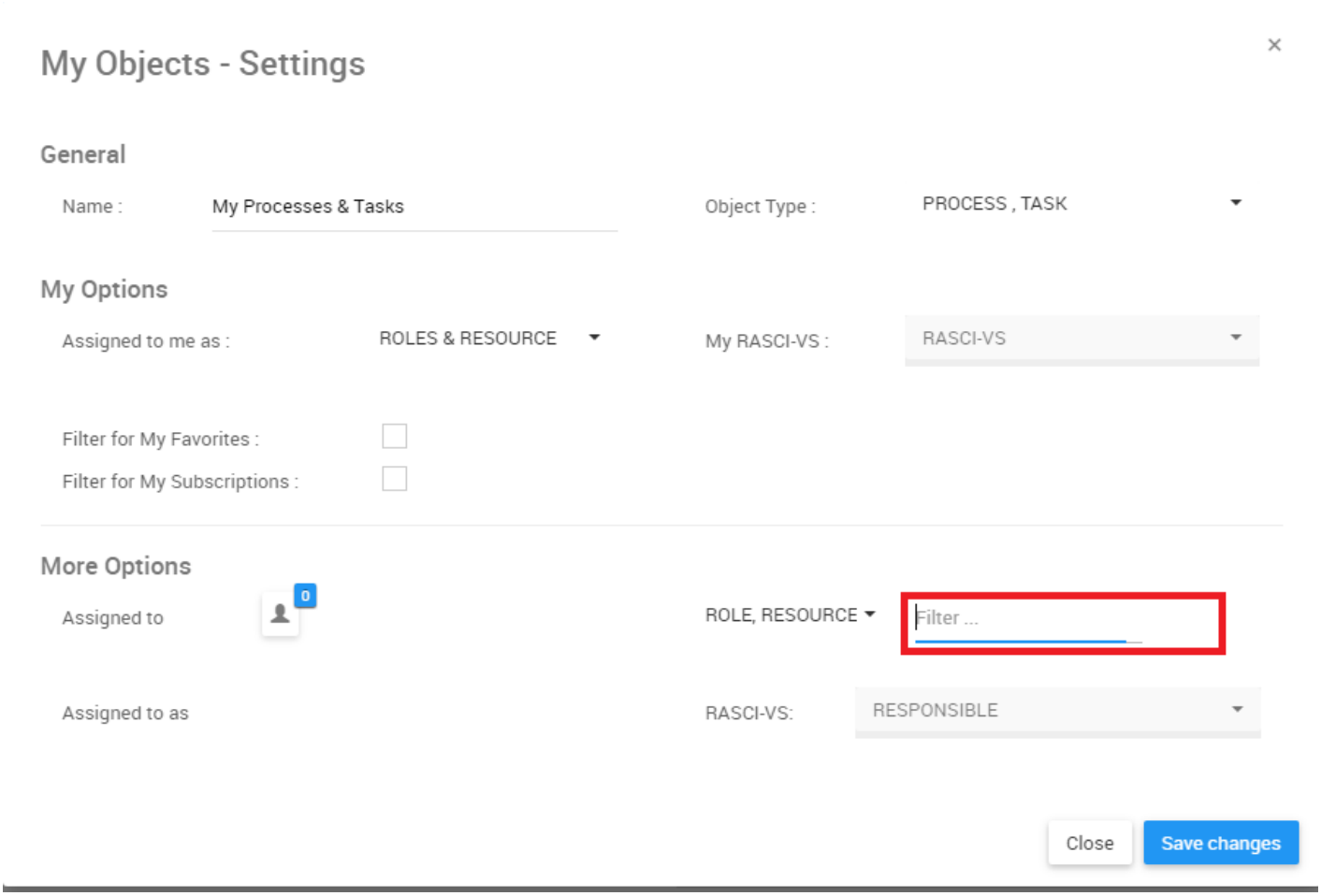


v. Once the desired Objects have been selected, click anywhere outline the drop-down menu, within the My Objects – Settings page to minimize the drop-down menu

vi. Next, navigate your cursor to the filter search bar to the right of the drop-down menu



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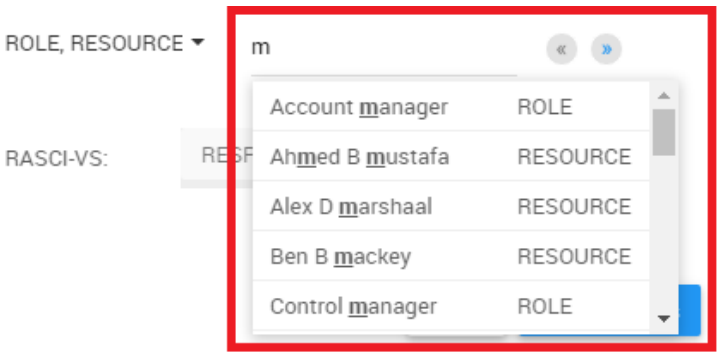
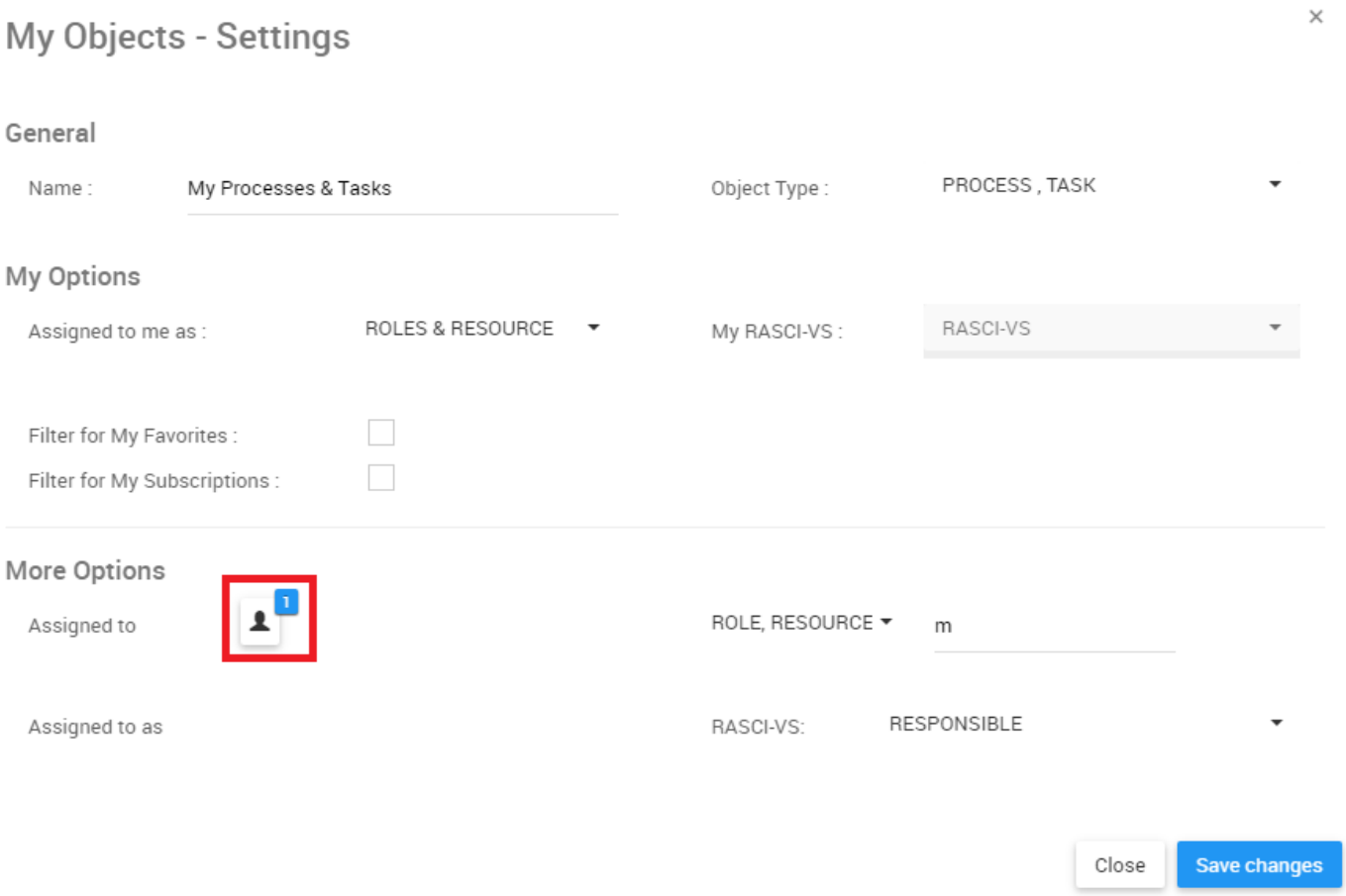
vii. The search bar has an auto-population function which allows users to easily find the specific item they are searching for. Once a user has selected the search bar, the user can begin typing. The auto-population feature will generate a list featuring the used letters or words.



If a user is unsure of specific spelling of a particular item, the user may also use the buttons listed above the auto-populated list. These are navigation arrows that let users sift through the different pages on search results generated.

viii. Select the desired object clicking on the desired item. Note that the confirmation of selection from an item will not appear in the drop-down menu. It will appear in the icon on the left hand-side of the page. To confirm that a user has selected the right object, navigate your cursors to the icon



ix. Click on the icon and it will display the selected object

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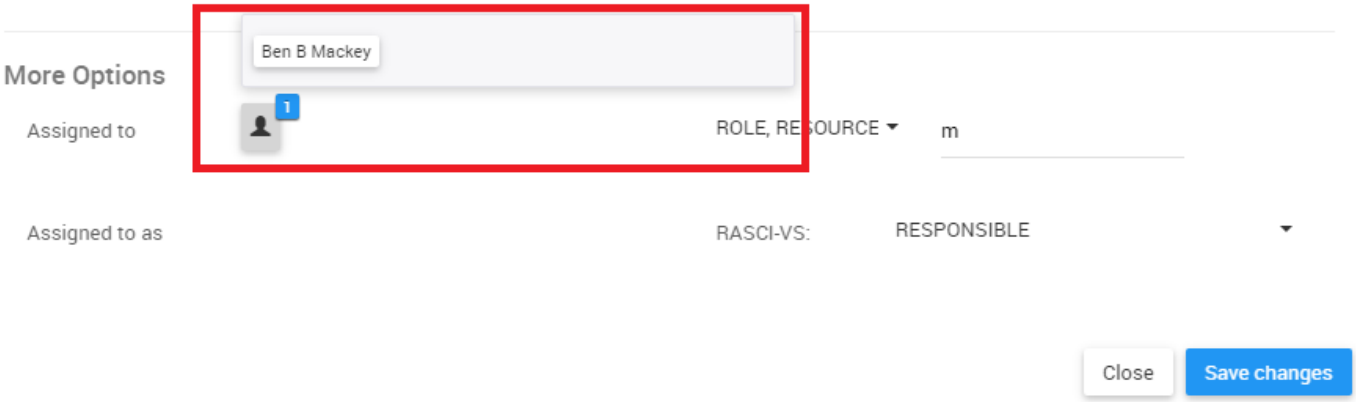

H. **Assigned to as:** The “Assigned to as” filter is an extension of the “Assigned to” filter. It allows for further segmentation and classification of objects selected using the RASCI-VS Matrix. This allows users to view additional Objects, who/what is related to them, and how they are related.

Note that this filter is **locked** until a user has properly selected an object in the “Assigned to” filter.

To filter using the Assigned to as function, please see the following instructions:

i. Navigate to the My Objects – Settings page

ii. Select Object in “Assigned to” Filter. Please see the **Assigned to** (G) above for further detail.

iii. After having selected a (or multiple) objects in the Assigned to section, navigate your cursor to the RASCI-VS drop down menu

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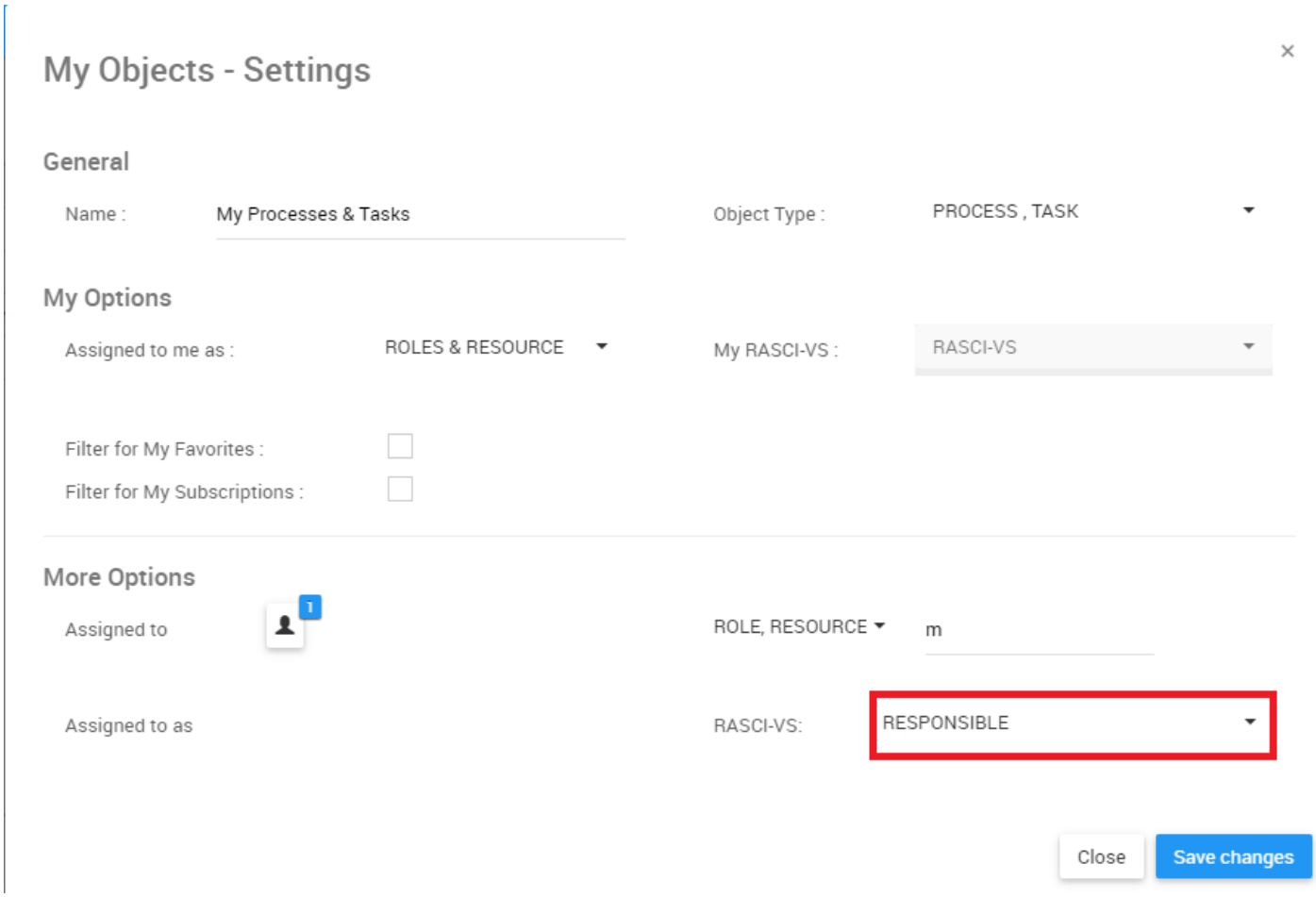

iv. Click on the item and it will generate a drop-down menu

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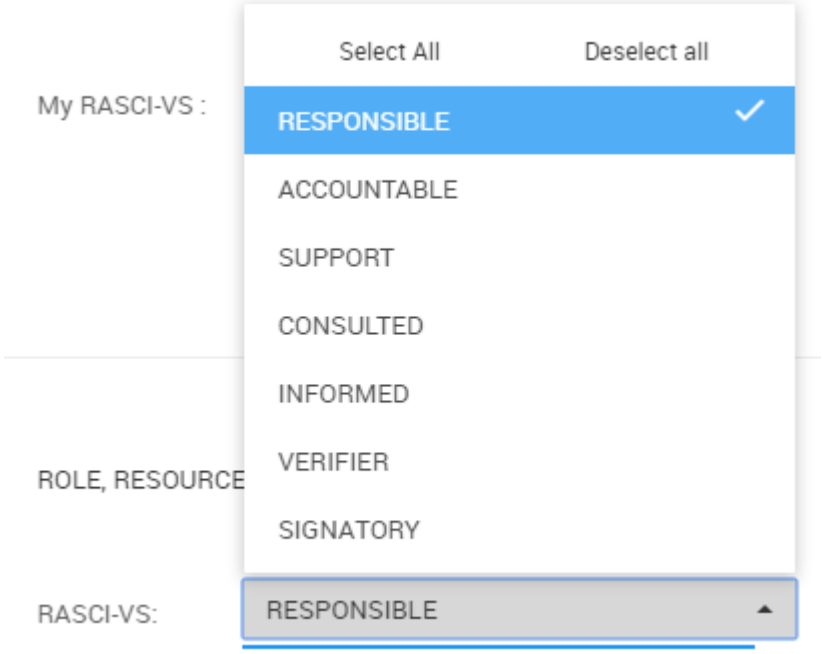

v. Select appropriate RASCI-VS metrics. Note that users can select multiple RASCI-VS metrics for viewing.

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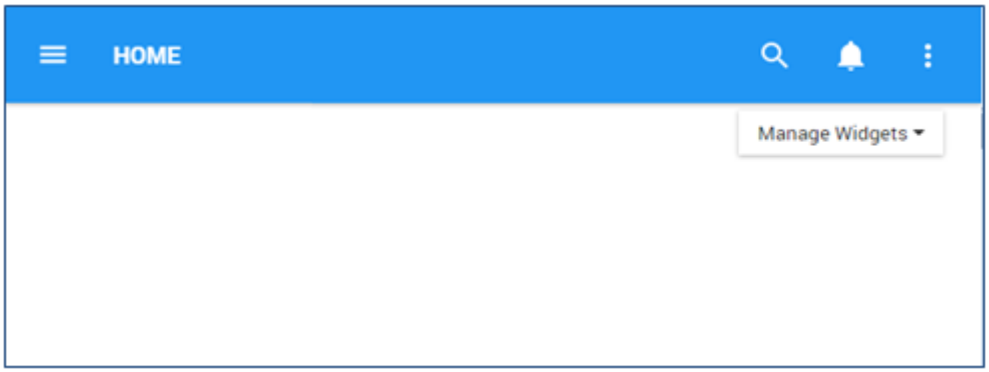
4.2.1.4.2 Customize My Performance Widgets

Customizing “My Performance” will allow users to prioritize key information related to their job responsibilities and performance. Please see the instructions below to customize the “My Performance” Widget.

1. Upon login, you will be greeted with the following page:



2. To add widgets to your home page, navigate to the “Manage Widgets” and add the “My Performance” Widget. (Please see **How to add Widgets from Home page** above for further detail).

3. Once the “My Performance” Widget has been added to the Home page, select the icon at the top right corner of the Widget and select the Settings button.

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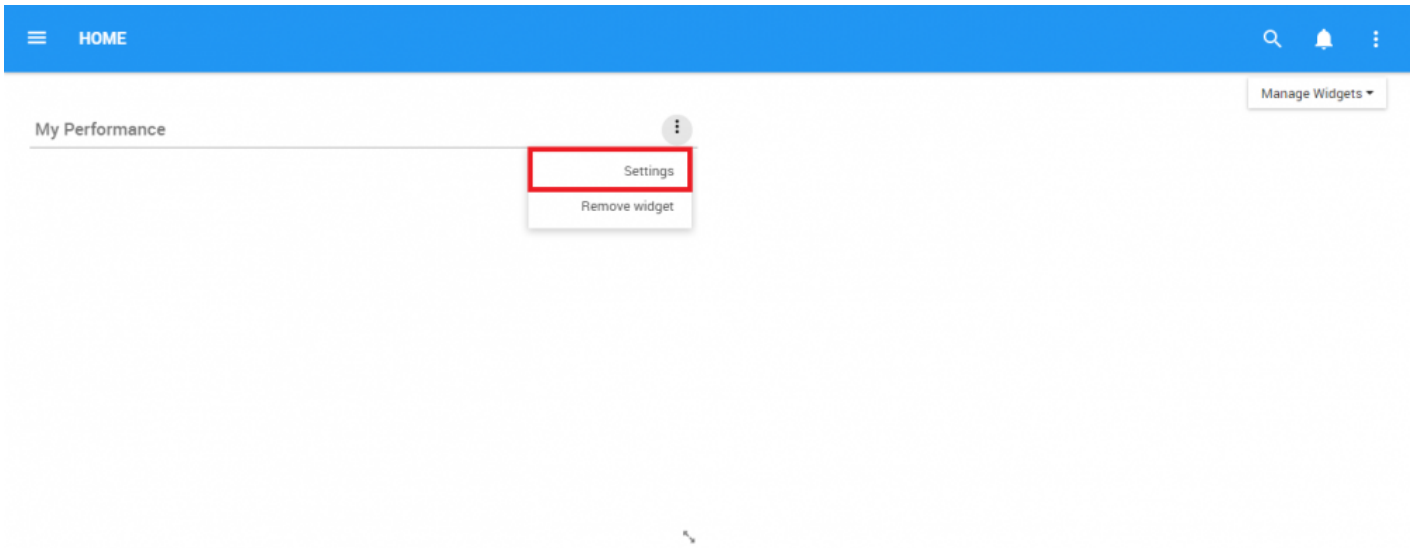
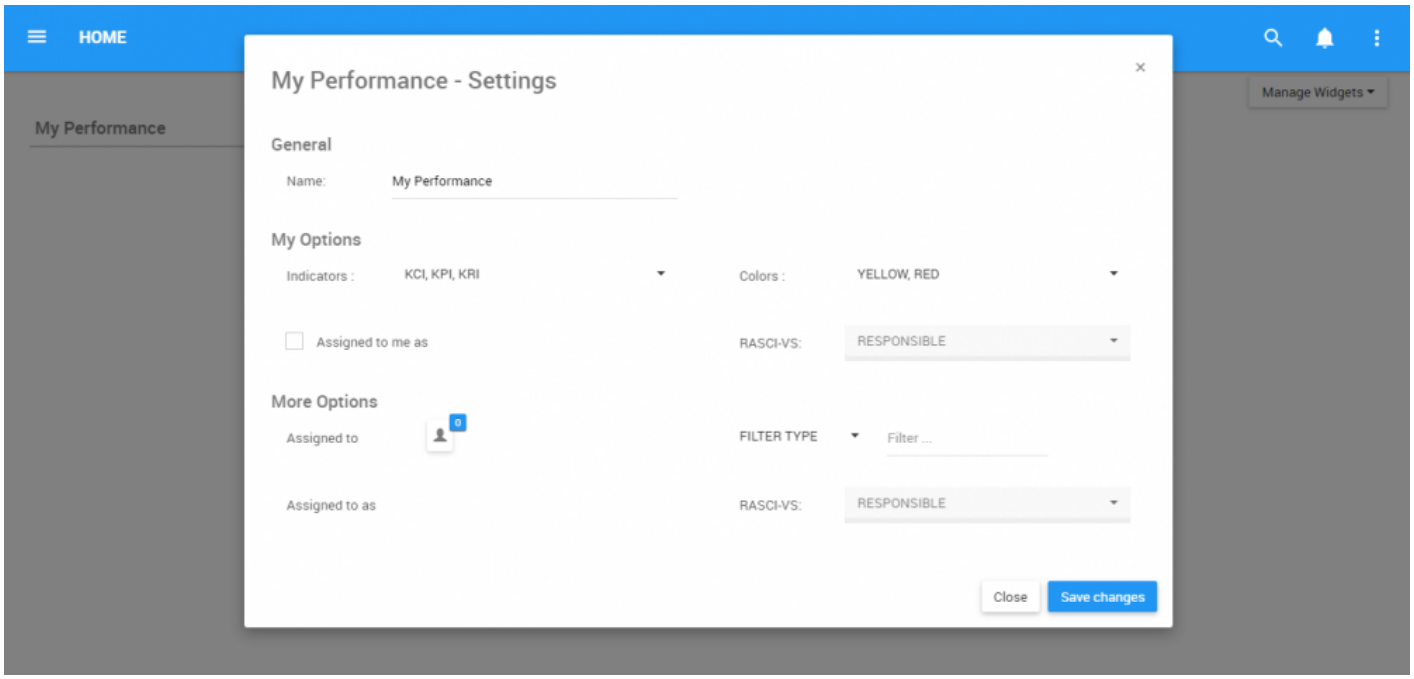


4. Click on the “Settings” button and a pop-up window will be generated as follows



In this page there are a variety of variables that a user can set in order to customize to improve user experience.

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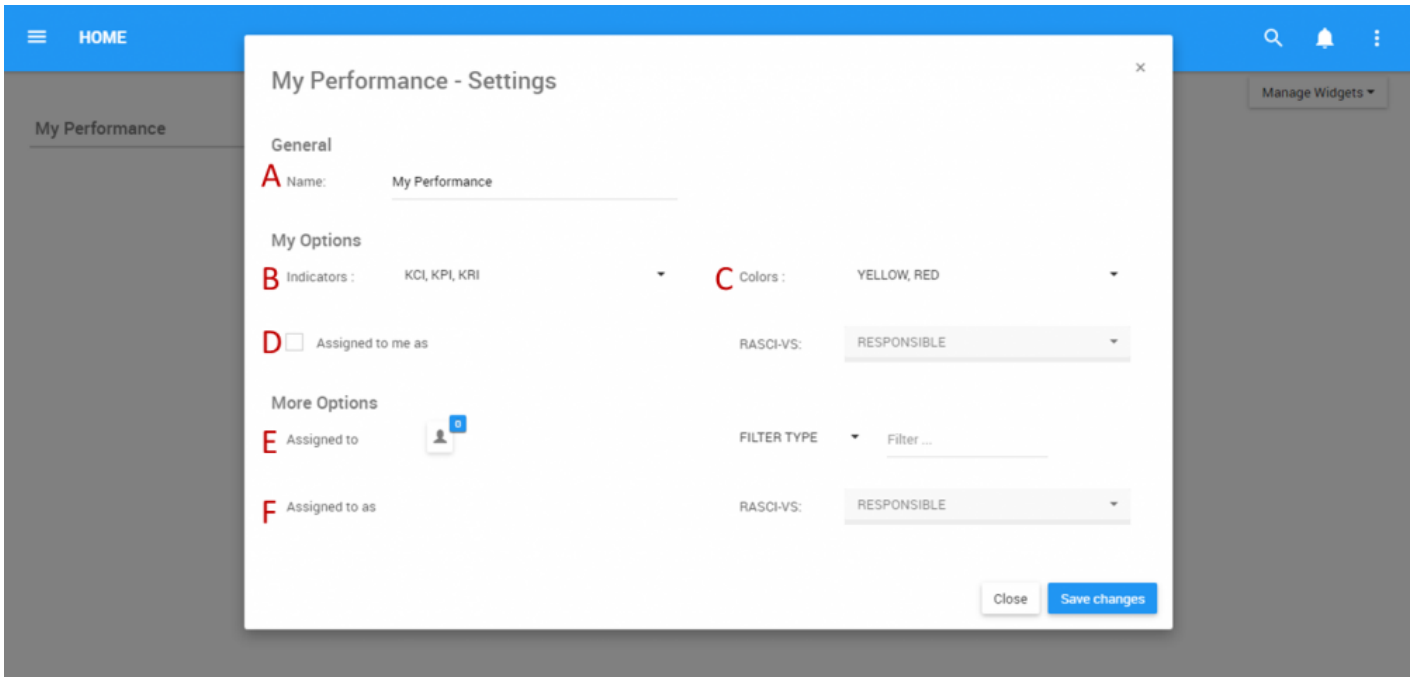

Item	Setting	Purpose
A	Name	Allows user to customize the title of the Widget
B	Indicators	Allows users to multiselect object type to be featured
C	Colors	Allows users to filter through their assigned roles (if numerous)
D	Assigned to me as	Allows users to filter through their assigned Performance Indicators (KPI, KCI, KRI) based on their level of involvement in accordance to the RASCI-VS Matrix
E	Assigned to	Allows users to filter objects that are indirectly related to an individual's personal Performance Indicators
F	Assigned to as	Further criterion helping users view filter objects indirectly relating to personal Performance Indicators Allows users to filter indirect relationships based on RASCI-VS criterion

A. **Name:** The "Name" Section will allow a user to customize the name of the Widget. To edit the "Name" section, please follow the instructions below

i. Navigate cursor over existing name box

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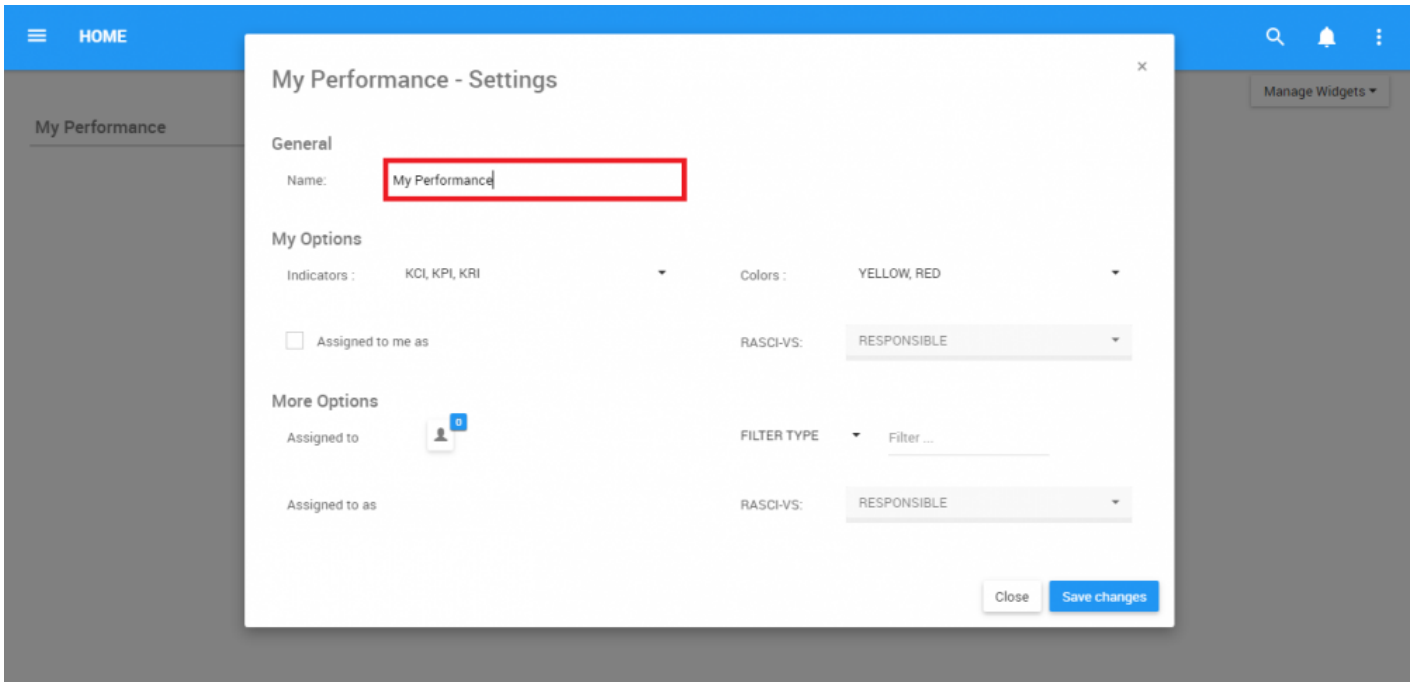

ii. Edit name by selecting name box and typing in desired name

B. **Indicators:** are the primary performance evaluation tools within the EPC. Filter through KCI, KPI, and KRIs that are associated to the user within the “Indicators” section in the Widget filters. Please see the following steps to customize Indicator filters;

i. Navigate cursor over the Indicators task bar

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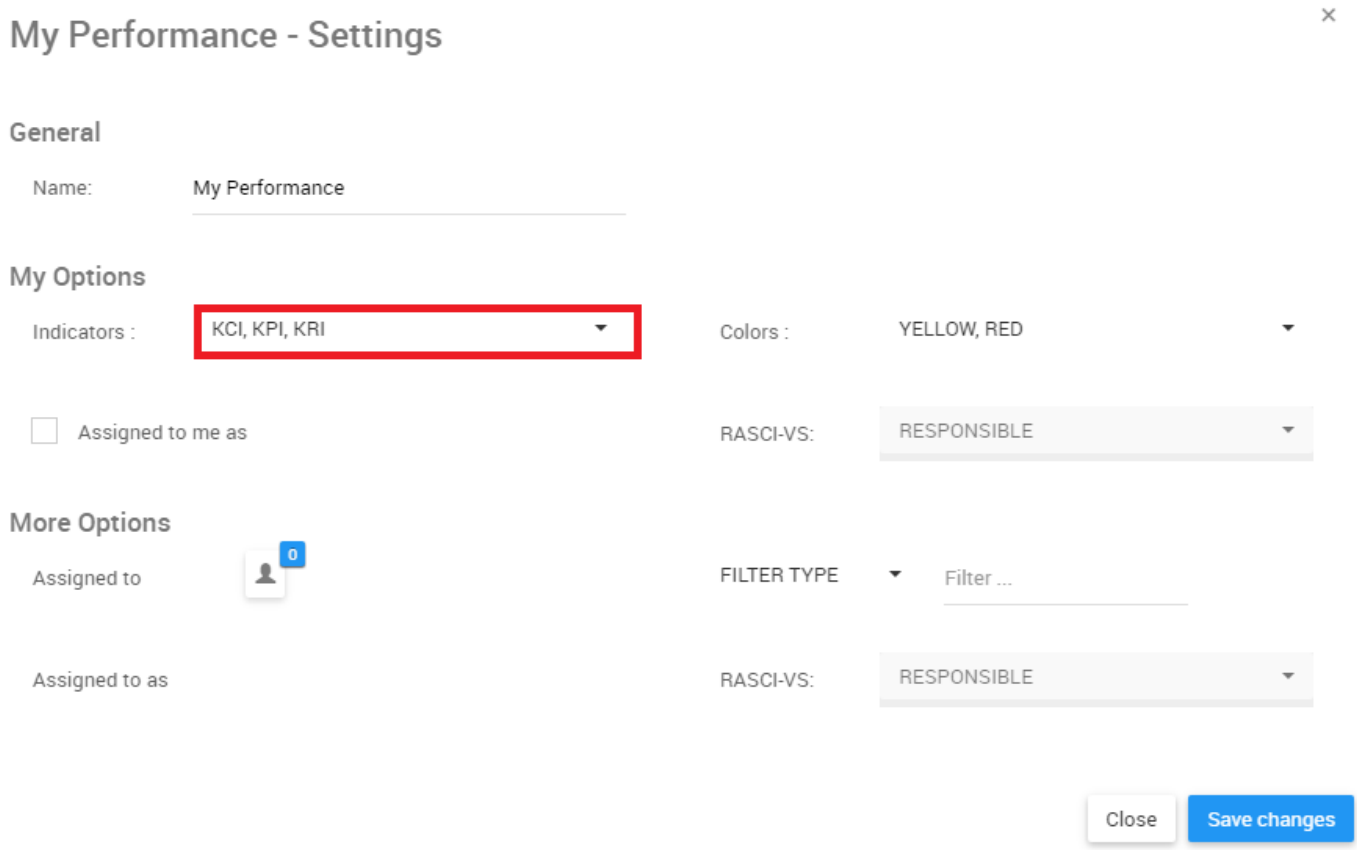
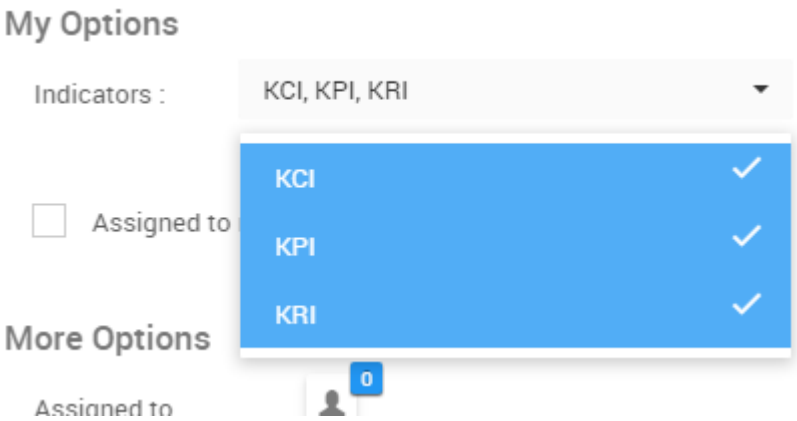


ii. Click on the task bar, which will generate a drop-down menu



iii. Select/Deselect desired object(s) to be featured in Widget window by navigating cursor and clicking on respective objects.

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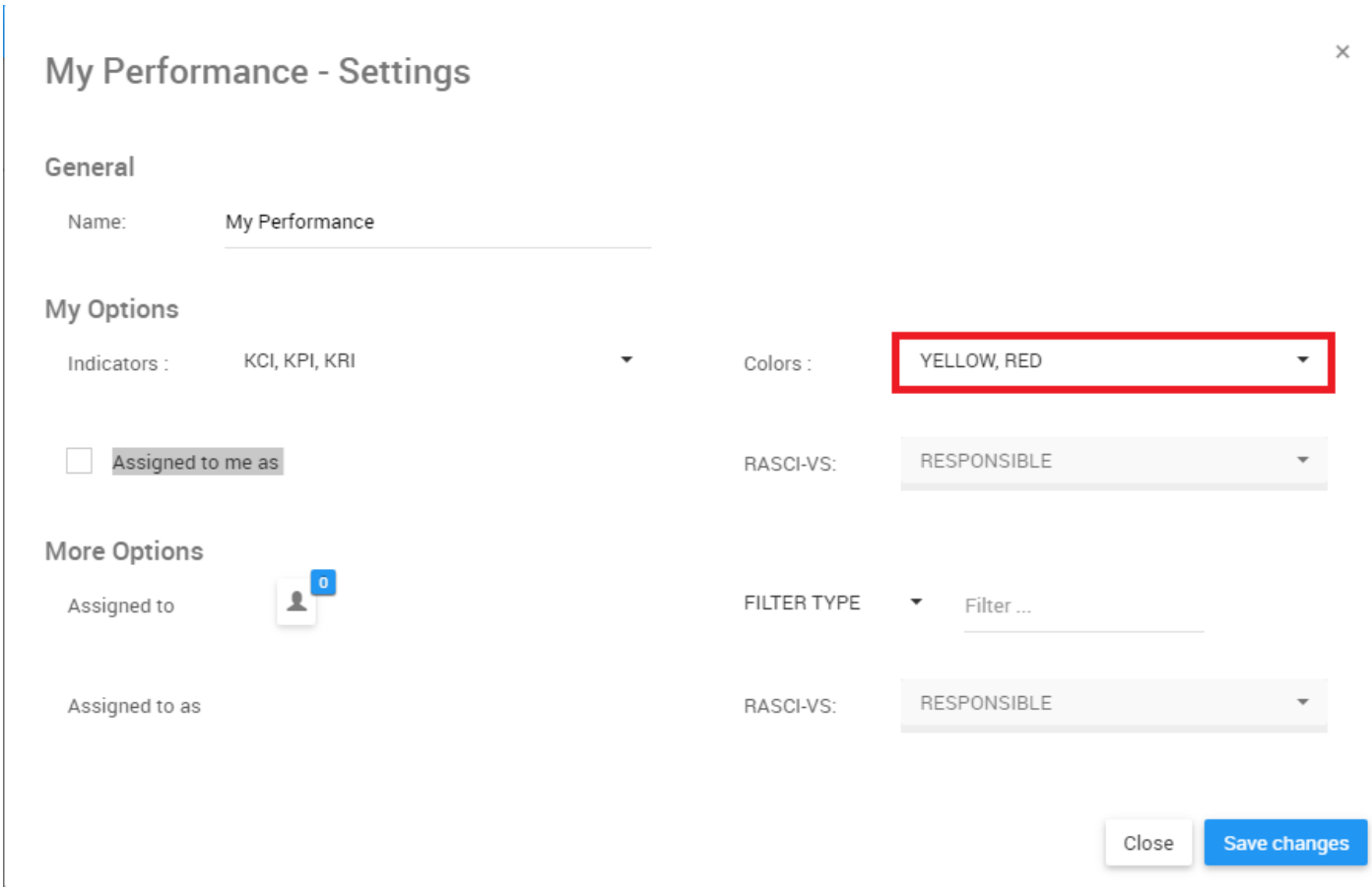
You may select **MULTIPLE** Indicators to be featured in individual Widgets.

C. Colors: Colors are used to rank indicators based current performance. The color coding is reflective of whether or not current performance is below expectation (Red), at expectations (Yellow) and above expectations (Green). The color filter can be used to view various indicators and their performance. Please see the steps below to customize the “Colors” Widget filter.

i. Navigate cursor over the Colors task bar



ii. Click on the task bar, which will generate a drop-down menu

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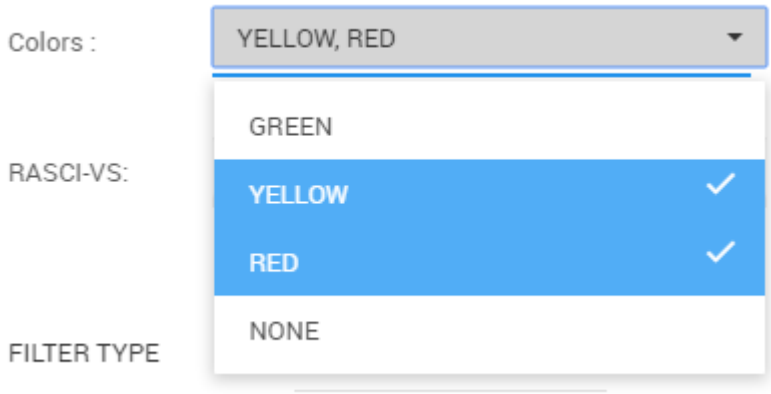

iii. Select/Deselect desired object(s) to be featured in Widget window by navigating cursor and clicking on respective objects.

D. **Assigned to me as:** Individuals are assigned Performance Indicators to provide governance and optimize performance. As such, users can query the specific Performance Indicators that have been assigned to them, to monitor their various responsibilities and performance criteria.

The “Assigned to me as” filter will allow users to view their Performance Indicators and the level of governance associated using the RASCI-VS Matrix.

Please see the following steps to use the “Assigned to me as” filter:

i. Navigate to the My Performance – Settings page

ii. On the My Performance – Settings page, navigate cursor to the “Assigned to me as” check-box. Note that the RASCI-VS criterion to the right will be **locked** until the box is selected.

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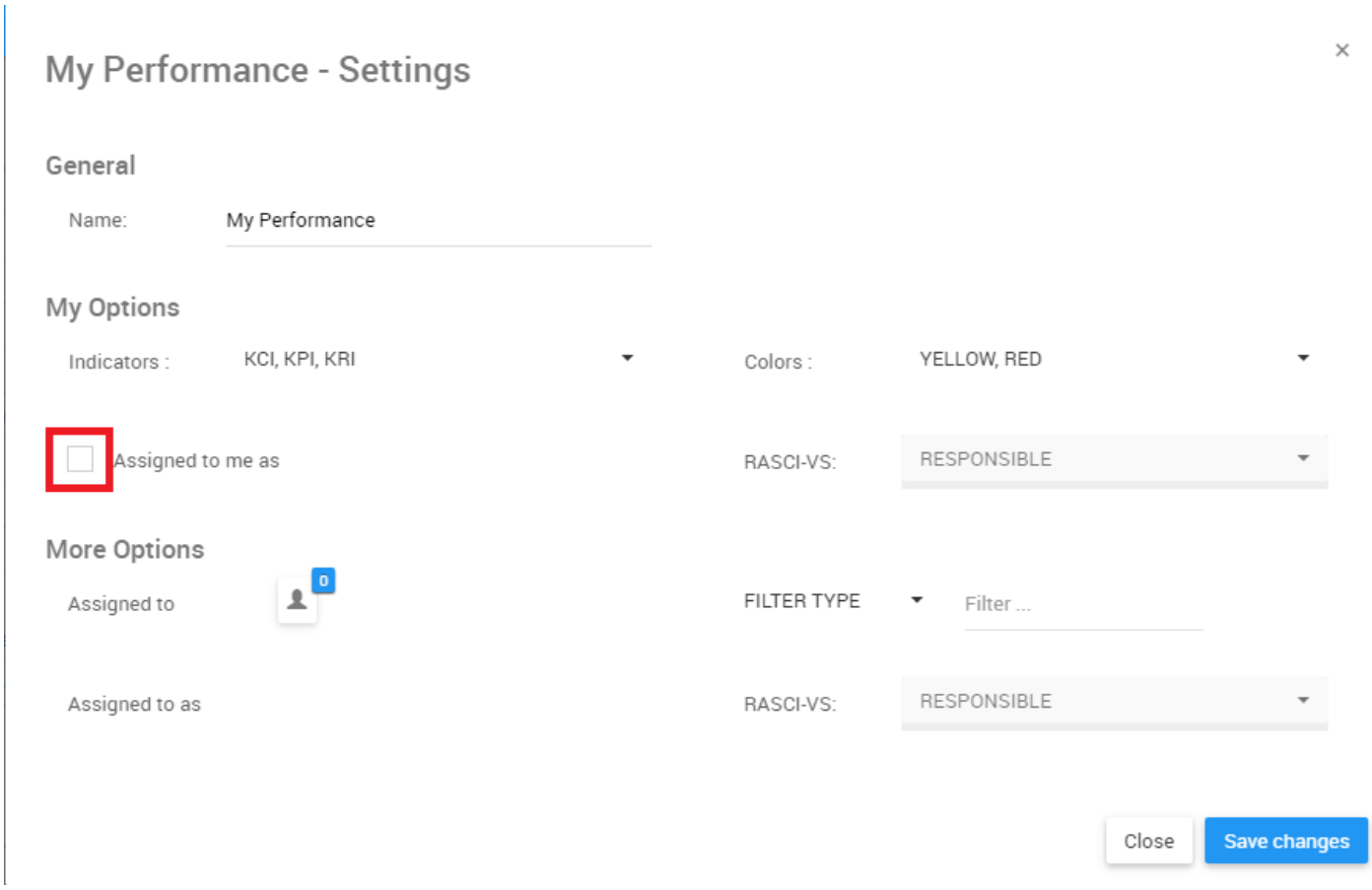
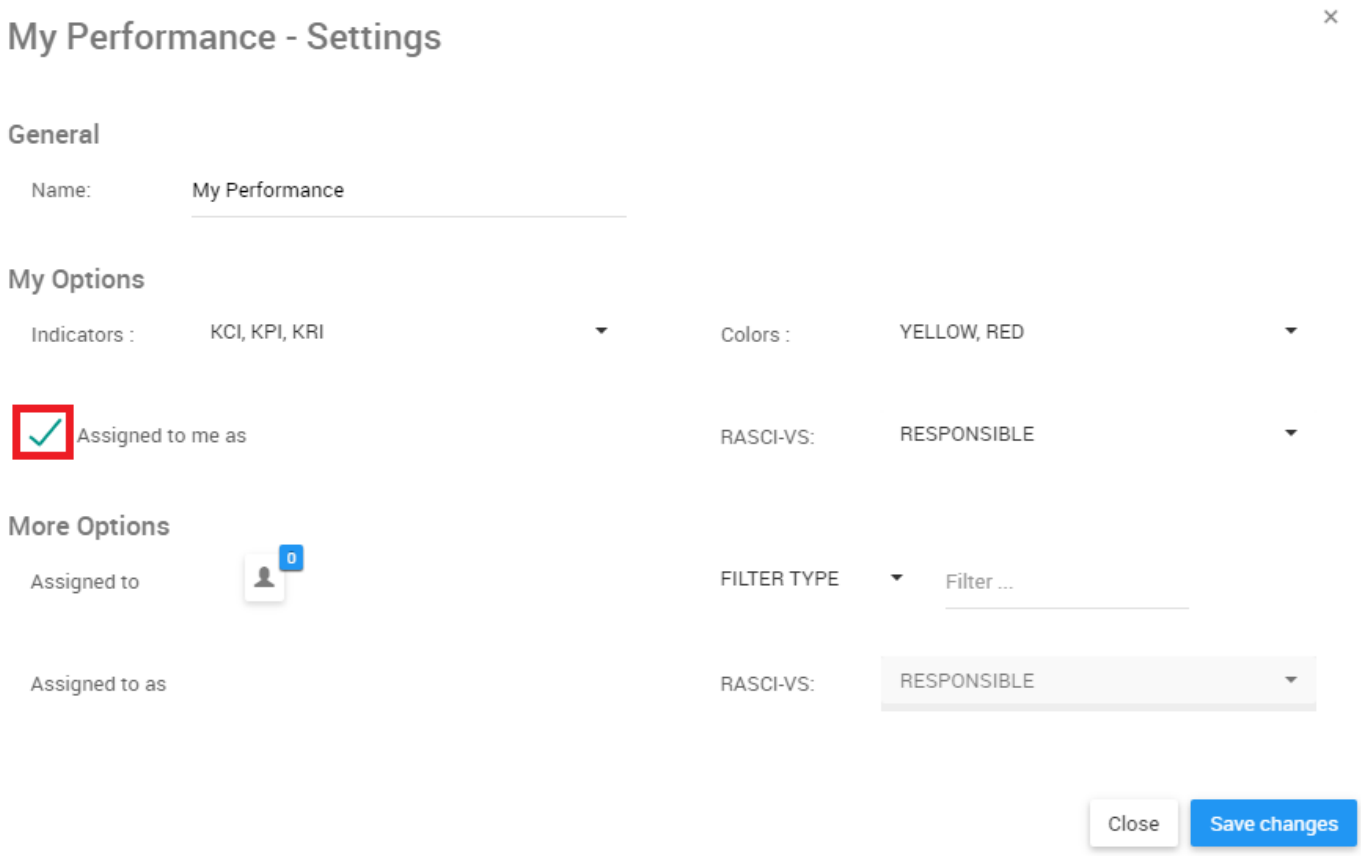
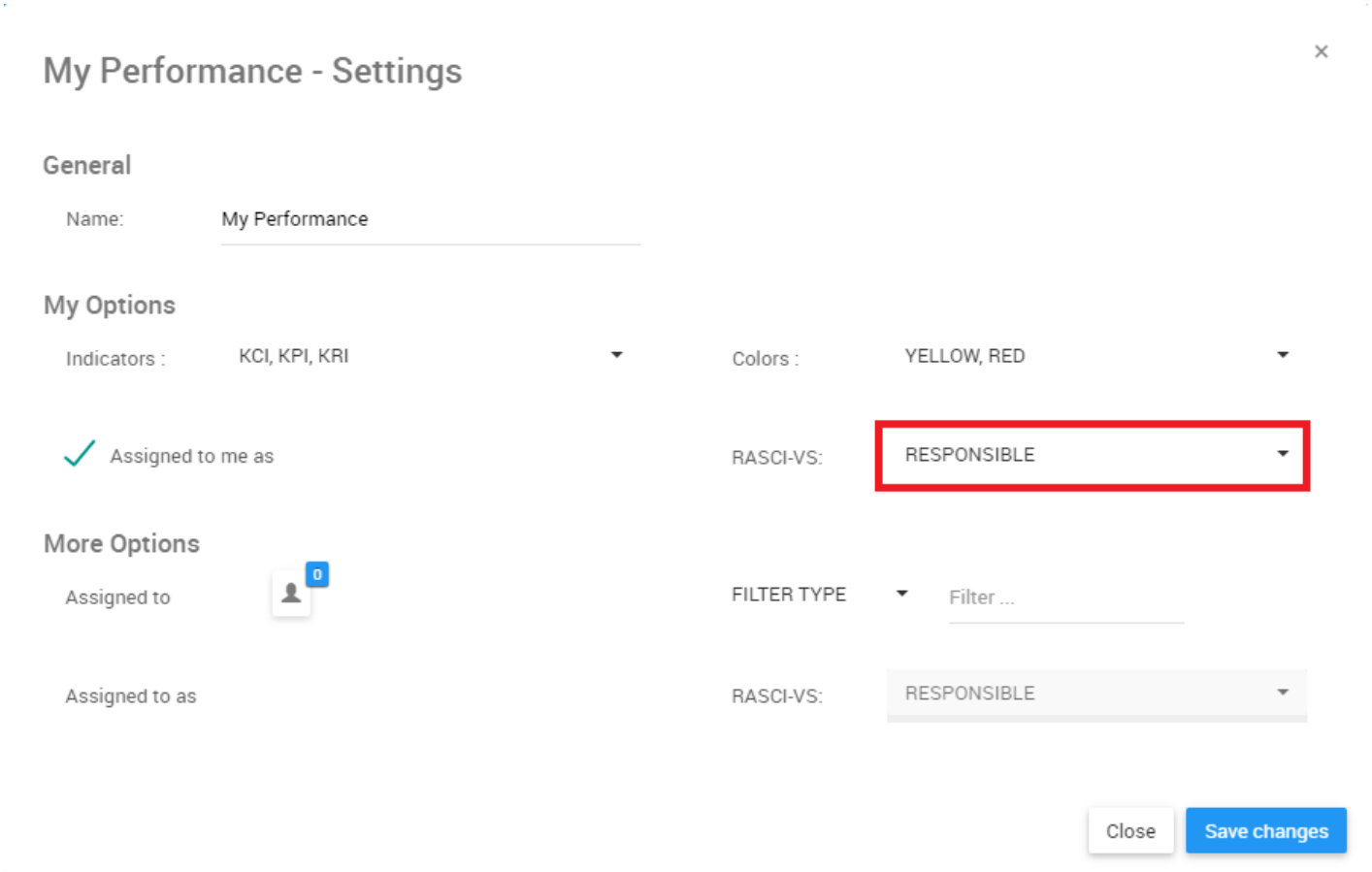


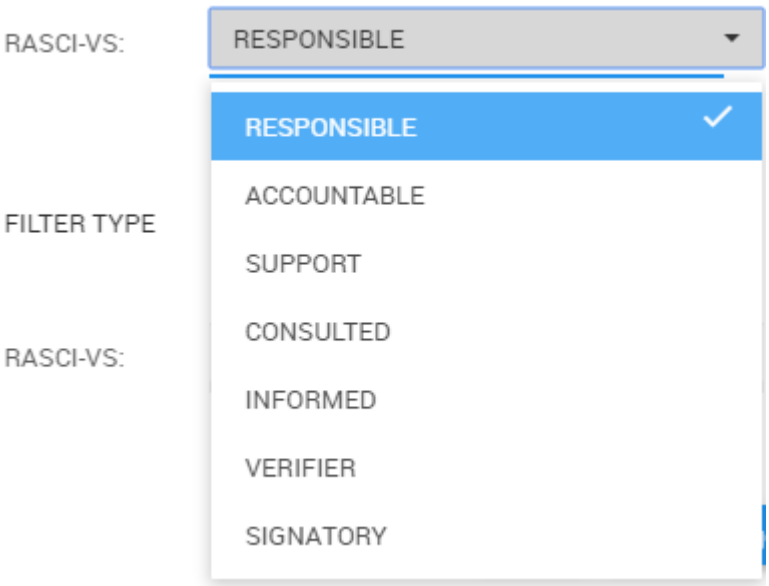
iii. Click the “Assigned to me as” check-box



iv. Navigate cursor to the RASCI-VS drop-down menu



v. Click on the RASCI-VS filter and a drop-down menu will be generated



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vi. Select the desired RASCI-VS Metrics. Note that you can select multiple RASCI-VS metrics.

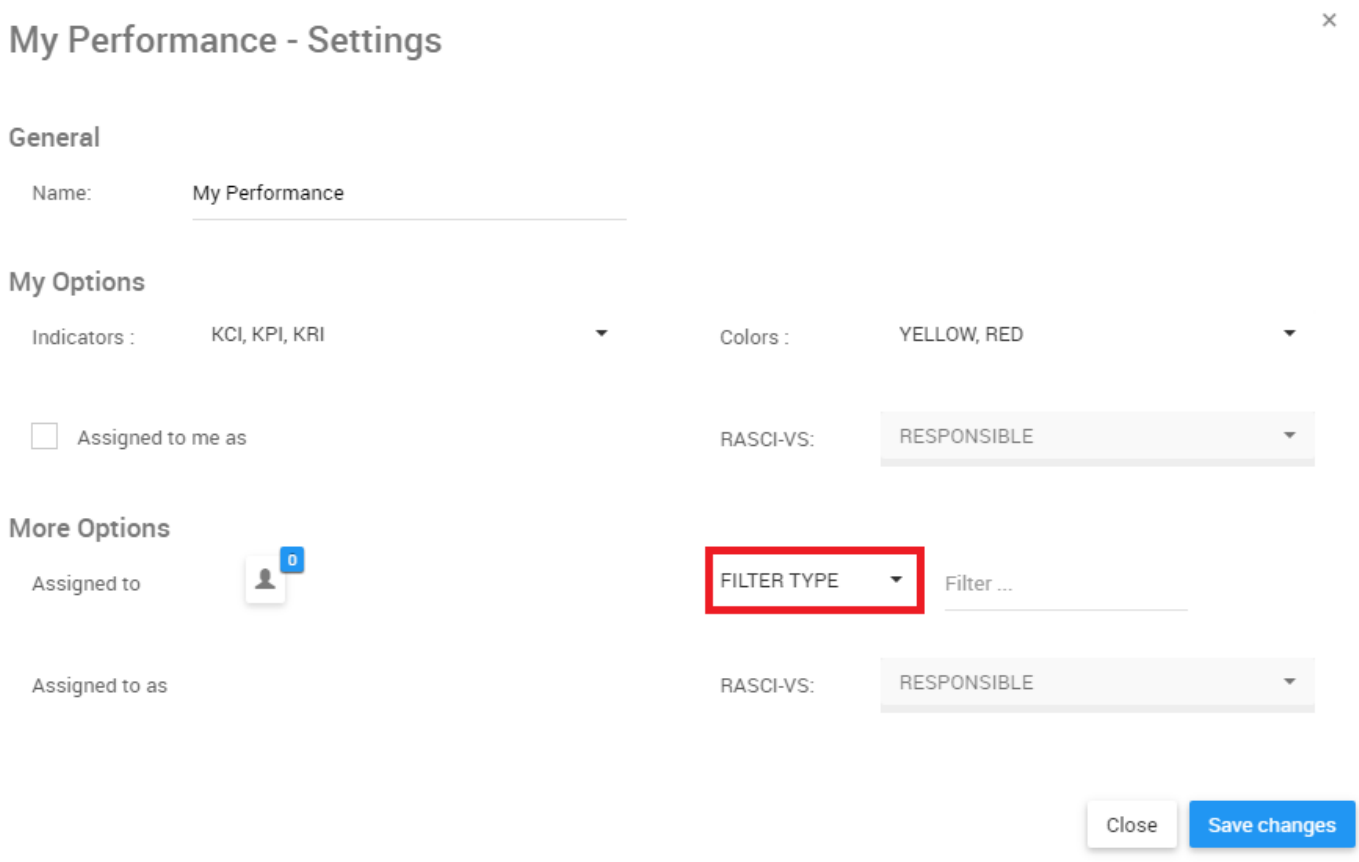
E. **Assigned to:** This filter is designed for users to view Performance Indicators that can have direct or indirect relationships with specific Roles, Resources, Assets or Organizational Units. This allows users to see which objects relate to different people and roles within the organization.

Using this filter will extend the scope an individual user can have within the organization.

To use the “Assigned to” filter, please see the following steps

i. Navigate to the My Performance – Settings page

ii. Select the “Filter Type” drop-down menu



iii. A drop-down menu will be automatically generated

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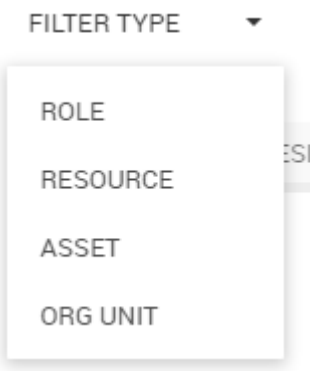
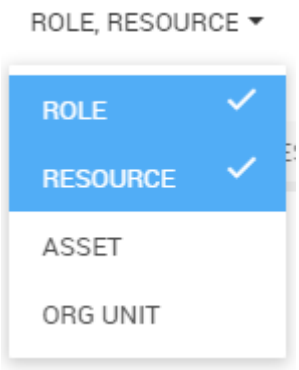


iv. Select the desired filter. Note that multiple filters can be selected.



v. Once the desired items have been selected, click anywhere outline the drop-down menu, within the My Performance – Settings page to minimize the drop-down menu

vi. Next, navigate your cursor to the filter search bar to the right of the drop-down menu

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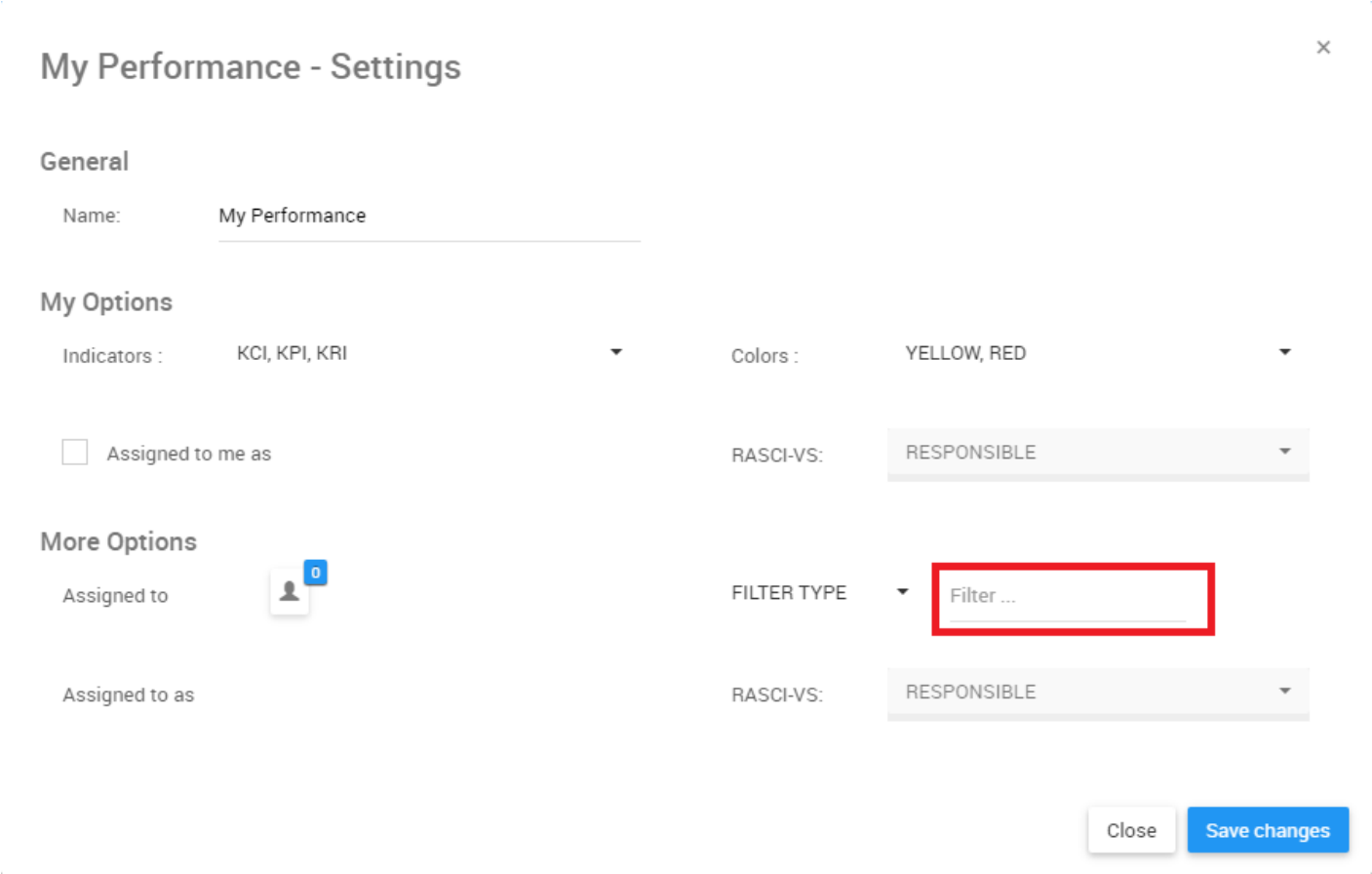
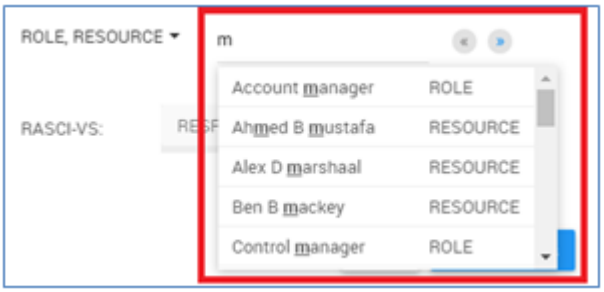


vii. The search bar has an auto-population function which allows users to easily find the specific item they are searching for. Once a user has selected the search box, the user can begin typing. The auto-population feature will generate a list featuring the used letters or words.



If a user is unsure of specific spelling of a particular item, the user may also use the « » buttons listed above the auto-populated list. These are navigation arrows that let users sift through the different pages on search results generated.

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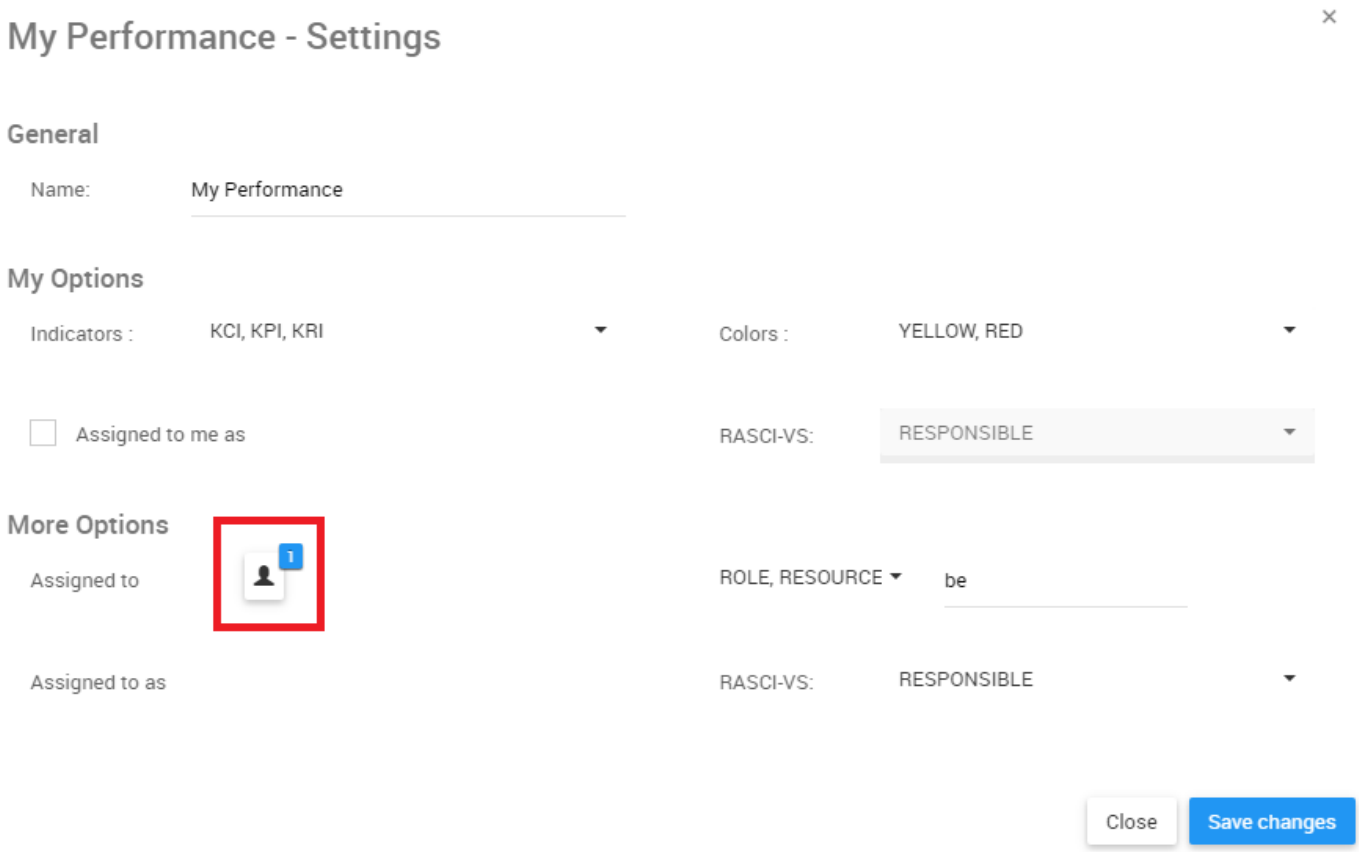
viii. Select the desired item clicking on the desired item. Note that the confirmation of selection from an item will not appear in the drop-down menu. It will appear in the icon on the left hand-side of the page. To confirm that a user has selected the right object, navigate your cursor to the icon



ix. Click on the icon and it will display the selected object

F. **Assigned to as:** The “Assigned to as” filter is an extension of the “Assigned to” filter. It allows for further segmentation and classification of Performance Indicators selected using the RASCI-VS Matrix. This allows users to view additional Objects, who/what is related to them, and how they are related.

Note that this filter is **locked** until a user has properly selected an object in the “Assigned to” filter.

To filter using the Assigned to as function, please see the following instructions:

i. Navigate to the My Performance – Settings page

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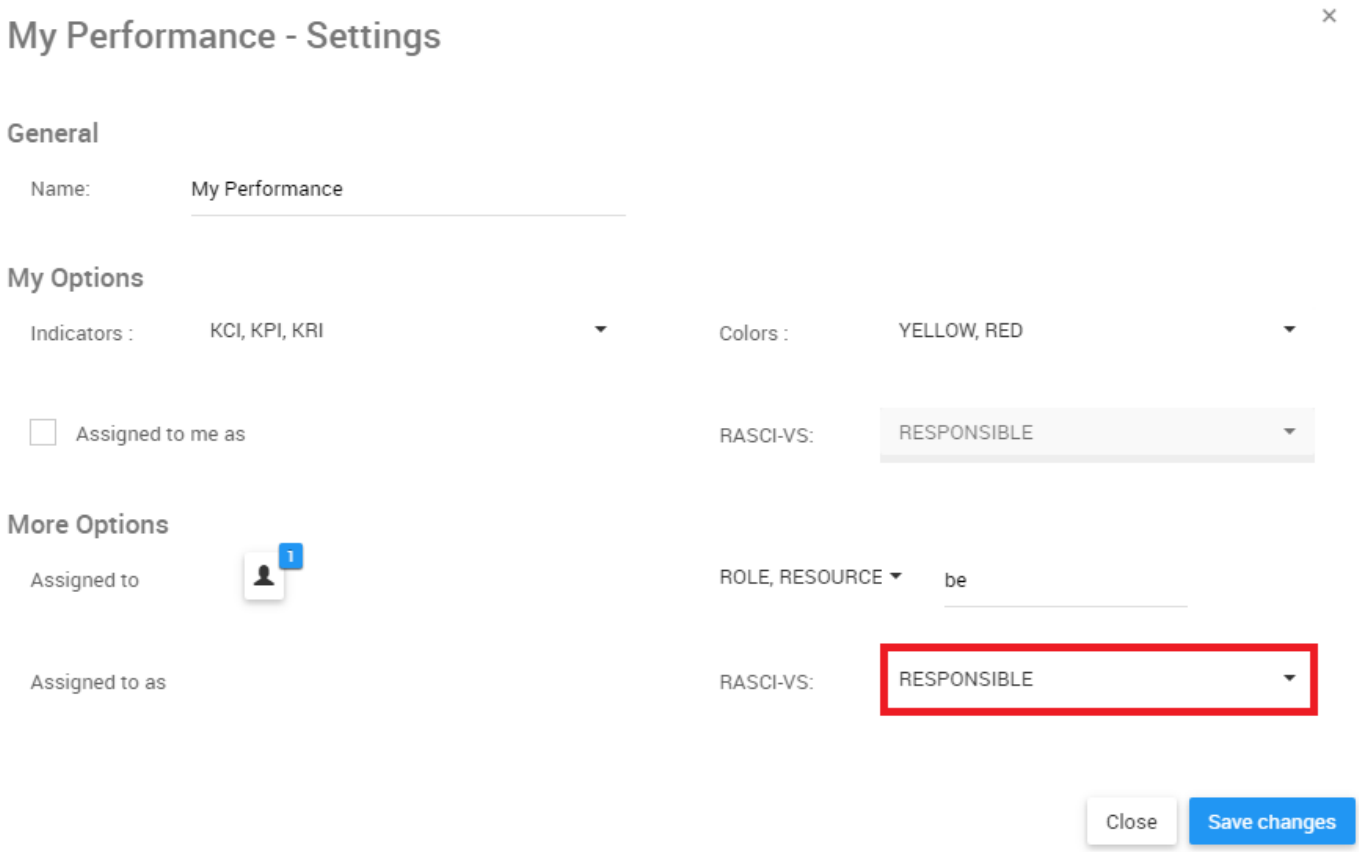
ii. Select item in “Assigned to” Filter. Please see the **Assigned to** (E) above for further detail.

iii. After having selected a (or multiple) objects in the Assigned to section, navigate your cursor to the RASCI-VS drop down menu



iv. Click on the item and it will generate a drop-down menu

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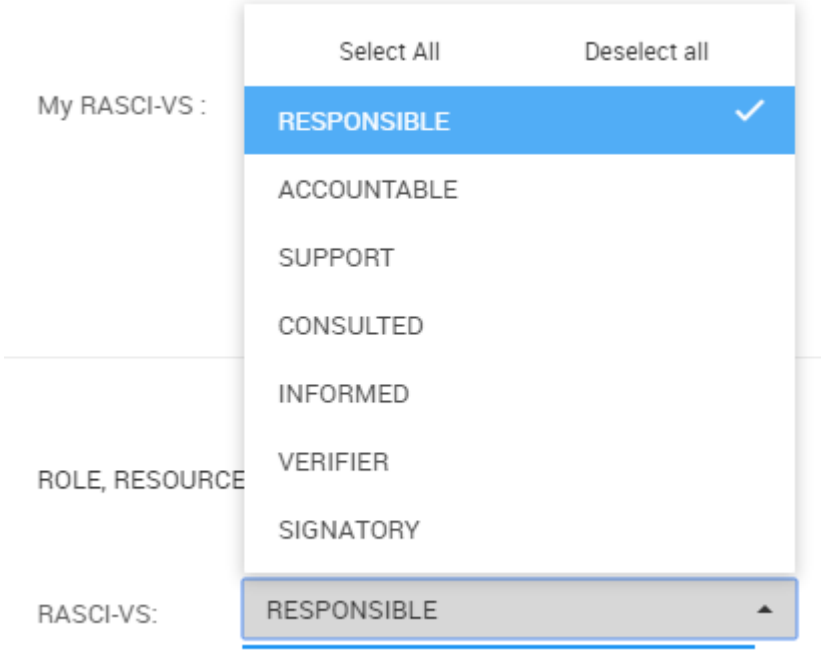

v. Select appropriate RASCI-VS metrics. Note that users can select multiple RASCI-VS metrics for viewing.

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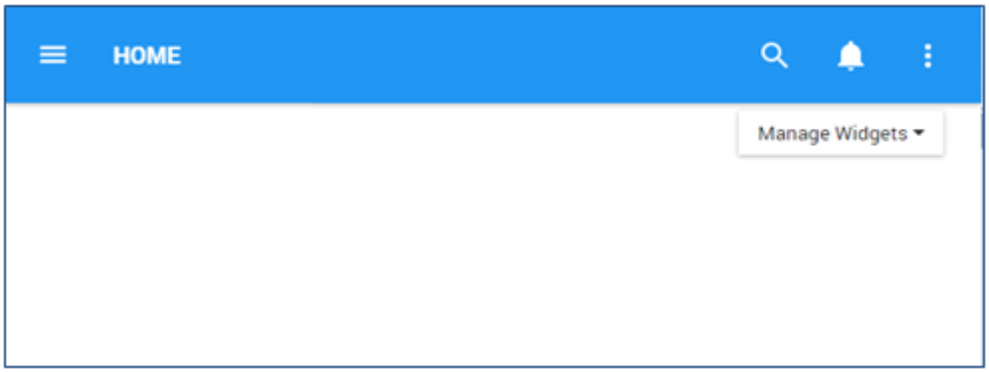
4.2.1.4.3 Customize My Actions Widgets

Customizing “My Actions” will allow users to view multiple different actions a user must perform in one or multiple Widget windows based on personal preference. Please follow the instructions below to customize the “My Actions” Widget.

1. Upon login, you will be greeted with the following page:



2. To add widgets to your home page, next you navigate to the “Manage Widgets” and add the “My Performance” Widget. (Please see **How to add Widgets from Home page** above for further detail).

3. Once the “My Actions” Widget has been added to the Home page, select the icon at the top right corner of the Widget and select the Settings button.

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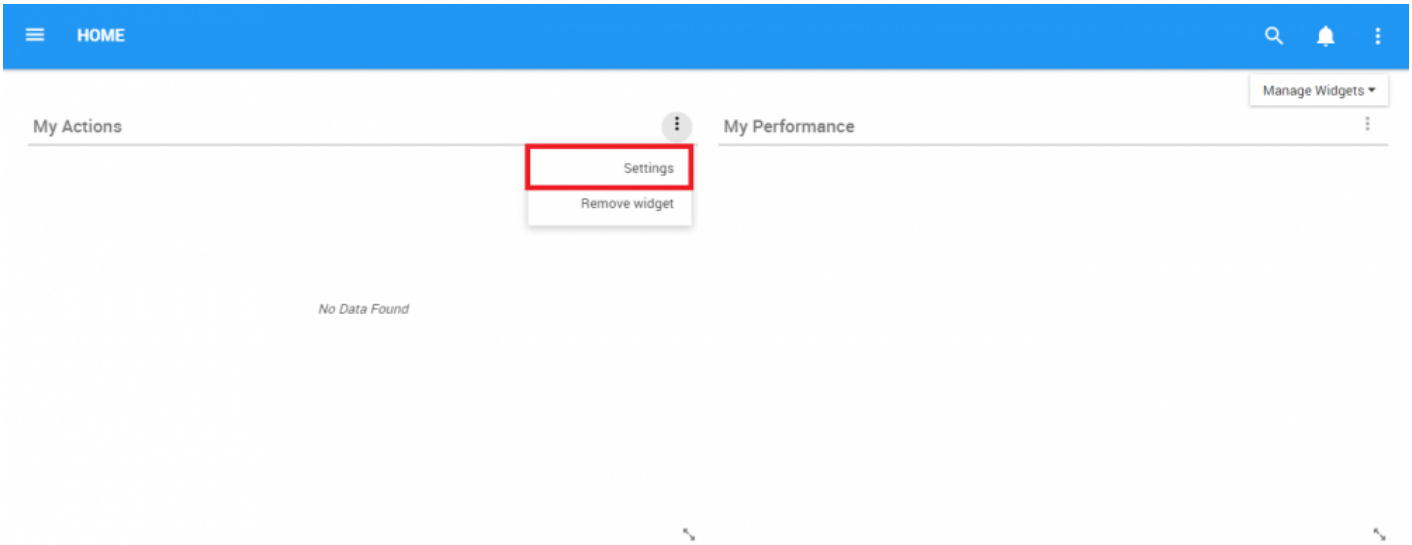
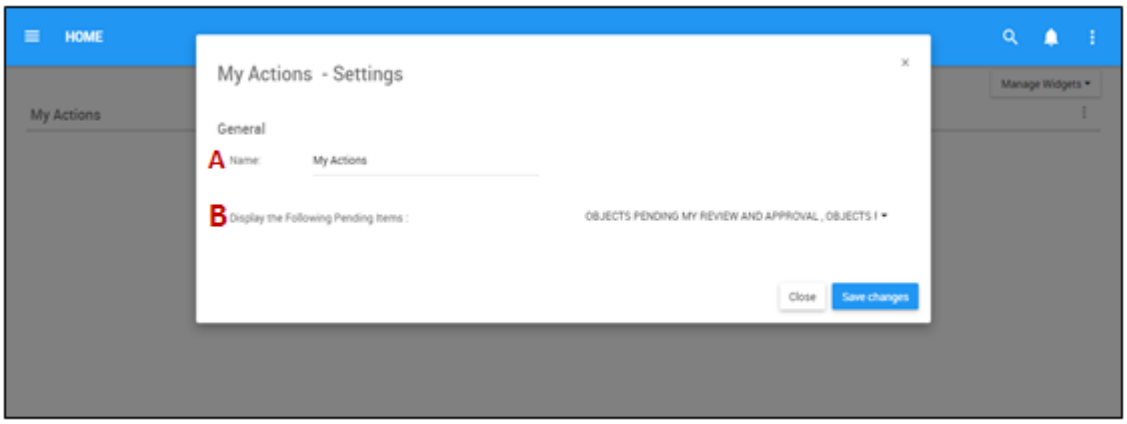


4. Users will have 2 major fields that can be edited in the “My Actions” Widget



Item	Setting	Purpose
A	Name	Allows user to customize the title of Widget
B	Display the Following Pending Items	Display specific actions a user is responsible to take

A. **Name:** The “Name” Section will allow a user to customize the name of the Widget. To edit the “Name” section, please follow the instructions below

i. Navigate cursor over existing name box

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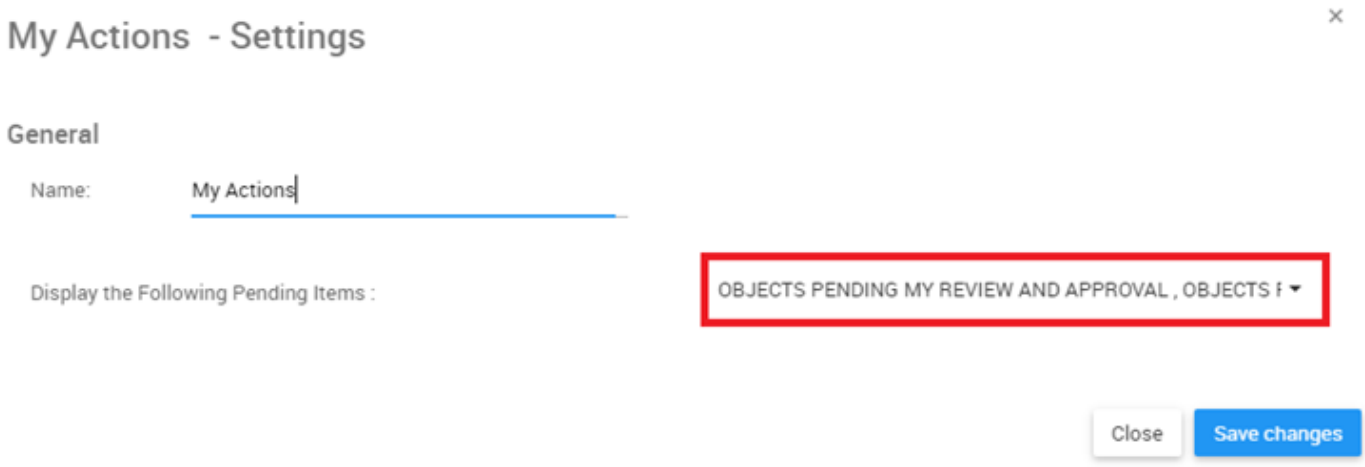
ii. Edit name by selecting name box and typing in desired name

B. **Display the Following Pending Items:** This function allows users to view their different actions and pending approvals.

i. Navigate cursor over viewing panel



ii. Click on the task bar, which will generate a drop-down menu

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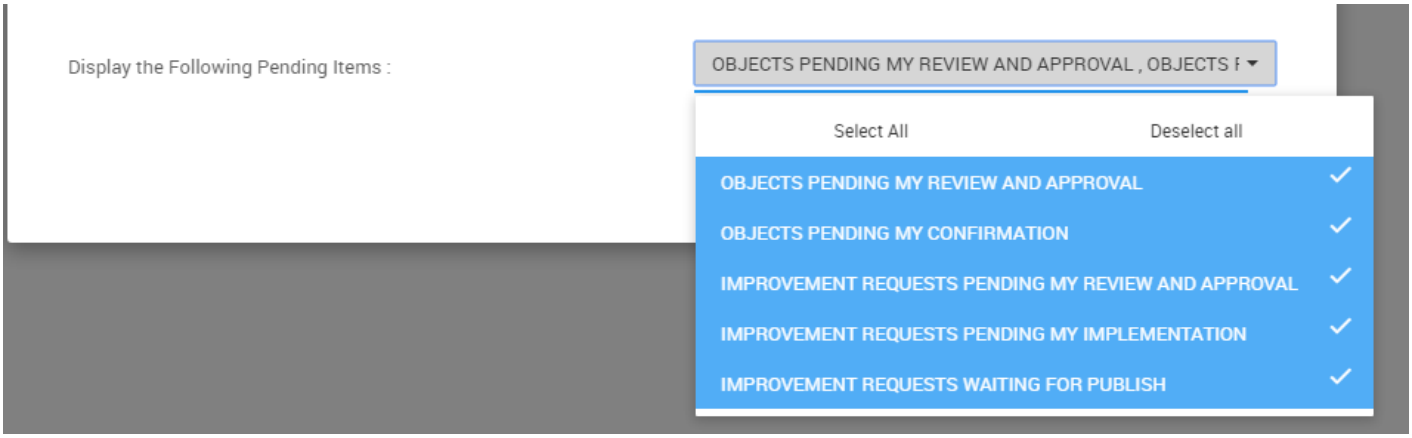

iii. Select/Deselect desired object(s) to be featured in Widget window by navigating cursor and clicking on respective objects. Additionally, the drop-down menu features Select All and Deselect all buttons that can be used for mass selection.

You may select **MULTIPLE** Objects to be featured in individual Widgets.

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4.2.1.4.4 Customization Rules

EPC Web App uses 2 sets of rules to allow users to filter information. These rules, once at work, allow users to filter increase precision, or expand the scope of the information they are looking to display in the Widget they are customizing.

Rule	Description
AND	AND clauses allow users to examine information with greater depth by providing more filters for data being queried. The result of using filters with AND clauses are that **less data** will be featured in the Widget.
OR	OR clauses allow users to examine information with greater scope by providing users with data that meets various sets of criterion. The result of using filters with OR clauses are that **more data** will be featured in the Widget.

These rules are applied either with individual filters or are applied when filters are compounded with one another. The filters that are provided to users, used individually, follow OR clause rules. However when they are combined, provide additional filters, thus following AND Clause methodology.

It is also important to note that different filters have different relationships. Please see the **Widget Filter Categories** section below for further details.

Individual Filter

If a user applies 1 filter, the filter will typically follow OR clause methodology. This meaning, that if a user applies multiple case scenarios to the one filter, the user will see the Widget populated with more data.

To illustrate this scenario, we will use the “Object Type” filter in the “My Objects” Widget. As we can see in the image below, a user can select multiple different object types within the filter settings.

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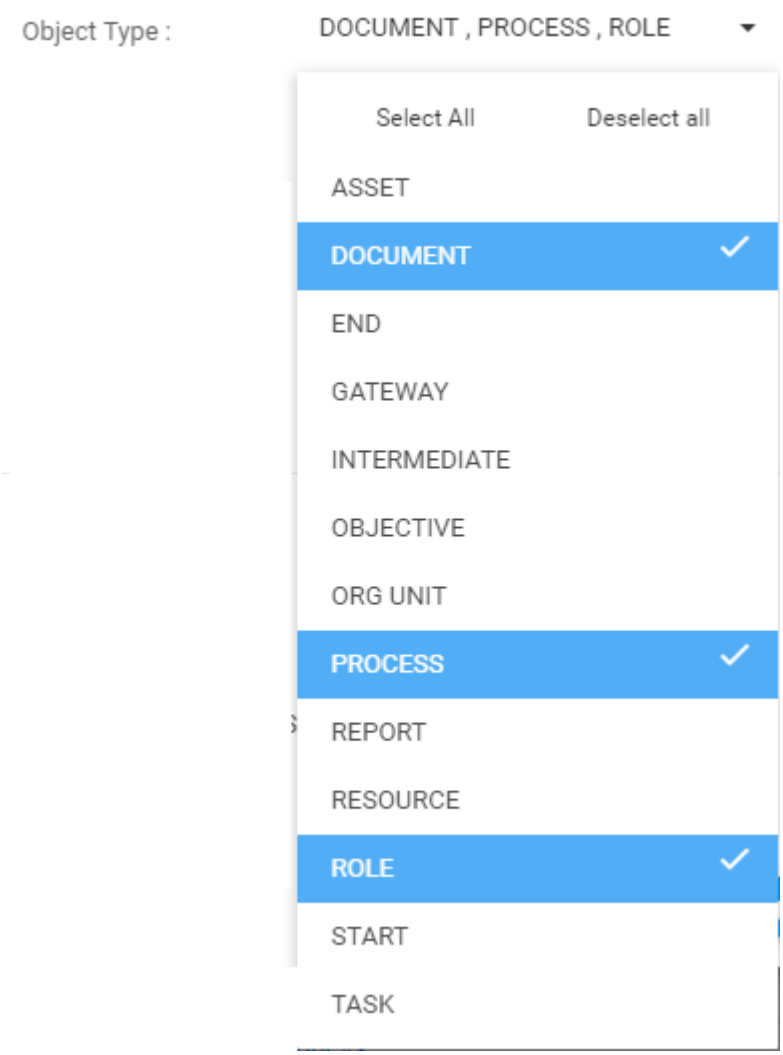

Once this filter is applied, the widget will filter all the items in the list that meet the criteria. In this example, all Documents, Processes, and Roles will be featured in the Widget.

This creates a Widget with a wide scope of information, and can be useful to users who desire to see multiple pieces of different information within a given Widget.

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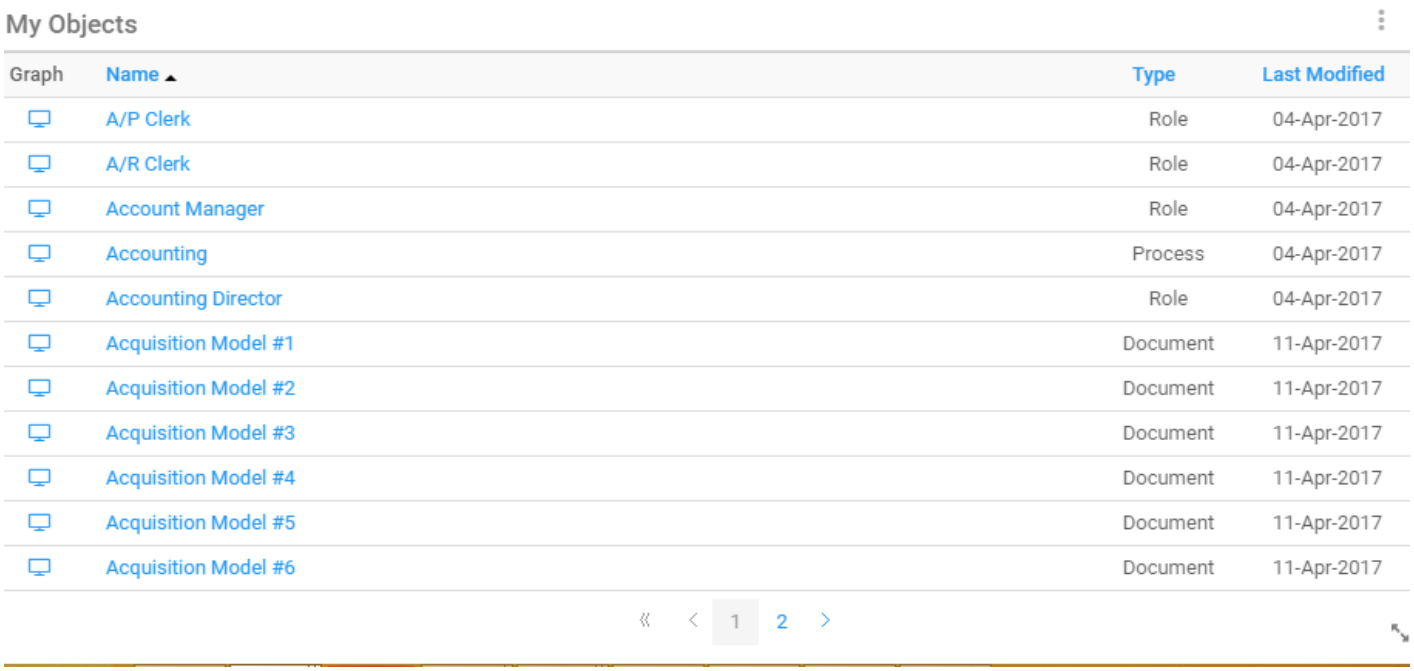

Compound Filter

Users can apply multiple filters to customize their Widgets. Combining multiple filters will allow users to populate their Widgets with more specific pieces of information. Combining filters creates scenarios where AND clause methodology applies. This meaning that a user applies more filters to increase the focus of the information that a user is choosing to view.

To illustrate this concept, we will use the “My Object Type”, and “Filter for My Subscriptions” Filters. The “Object Types” selected will be Documents, Processes and Roles.

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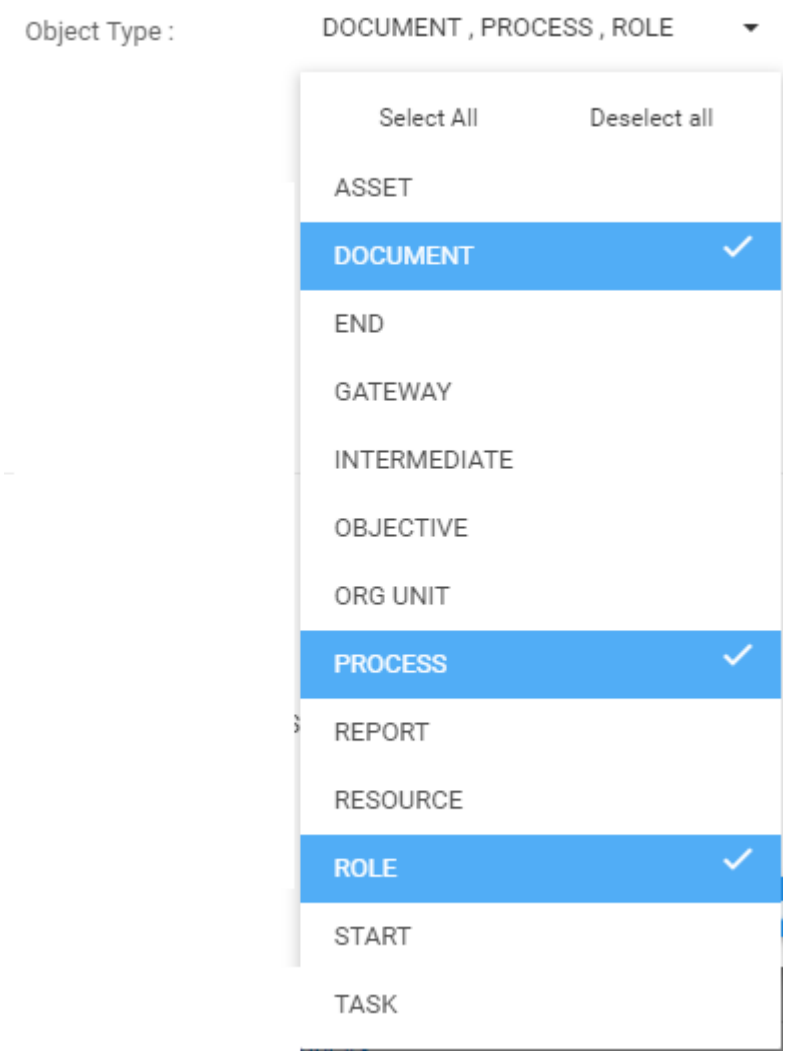

If a user simply applied this filter, the Widget would populate itself will all Documents, Processes and Roles that the user has access too. However, by applying both the “Object Type” and the “Filter for My Subscriptions” filters, the user will further narrow down the information selected.

With both of these filters applied, the Widget will only feature items that meet both filter criteria. This meaning that ONLY Documents, Processes and Roles that have been Subscribed too will be featured in the Widget

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As you see, comparing the Widget with Compounding Filters features less information than the Widget with an Individual filter. This increases the precision of the information but reduced the scope.

When users are customizing their Widgets, it is important to balance Scope and Precision.

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4.2.1.4.4.1 Widget Filter Categories

Filters interact differently with one another. Given the large number of filtering criteria available for users to customize, understanding the relationships of these filters is important when customizing Widgets. Outlined below will be the relationships between

1. My Objects Widget Filters
2. My Performance Widget Filters

Note that the My Action Widget Filter only contains 1 Filter which follows OR clause methodology.

Relationships

1. All Items within a filter (E.g. Object Type) possess **OR Clause** relationships
2. All filters within a category (e.g. Filter for My Subscriptions and Filter for My Favorites) possess **AND Clause** relationships
3. All Filter categories, excluding Name, interact with **AND Clause** relationships (E.g. My Options and More Options)

MY OBJECTS WIDGET FILTER CATEGORIES

My Object Widget filters can be broken down into 4 categories.

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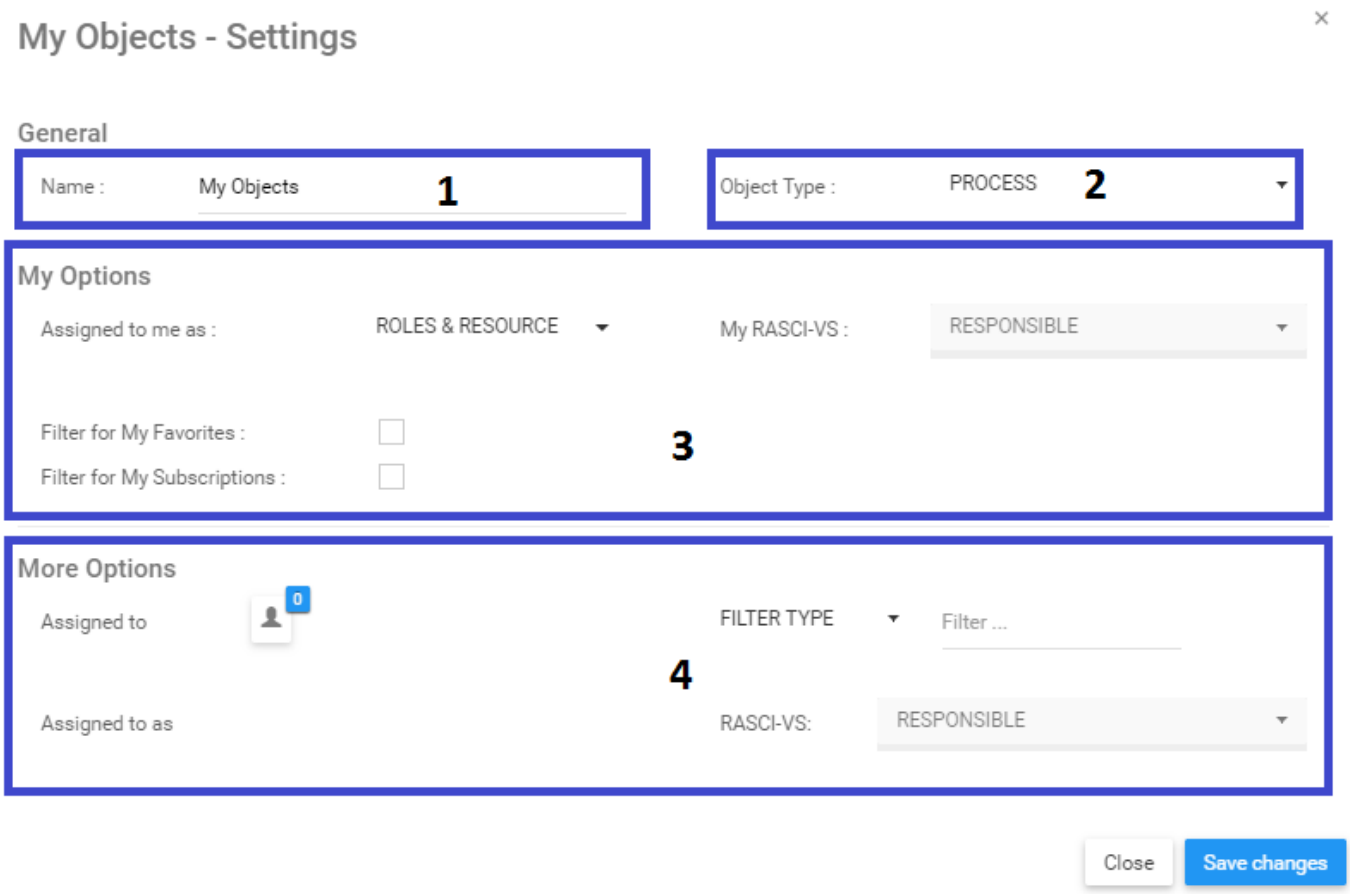

	Category	Description
1	Name	General Naming Category. Independent of other filters.
2	Object Type	Object Type selection. Main governing filter within the My Objects Widget.
3	My Options	Personal Object associations filters. Allows users to filter through objects they are personally related too, directly or indirectly.
4	More Options	External Object filters. Allows users to filter through all objects, and the people they are assigned to, whether or not they are associated to them.

MY PERFORMANCE WIDGET FILTER CATEGORIES

My Performance Widget filters can be broken down into 3 categories.

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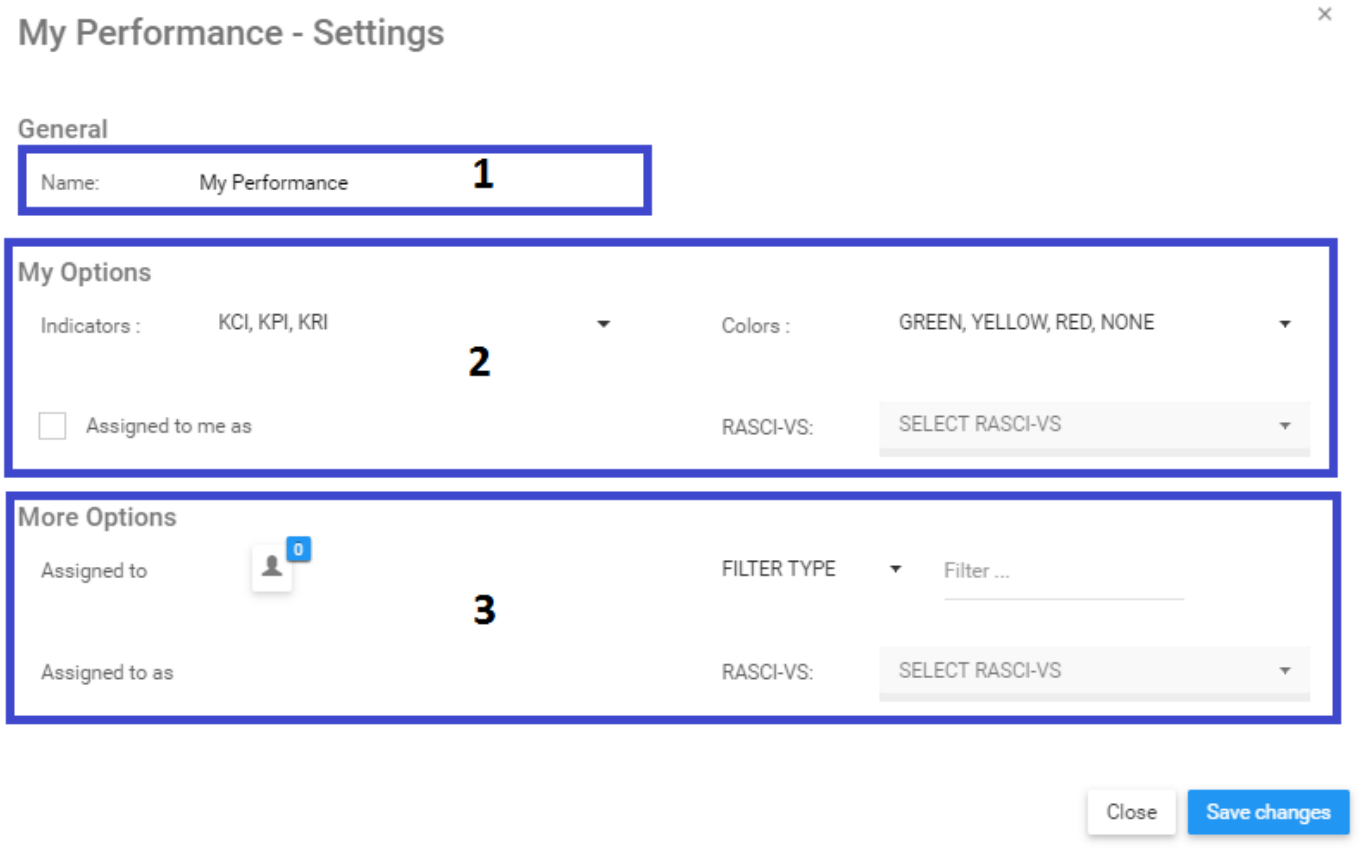

	Category	Description
1	Name	General Naming Category. Independent of other filters.
2	My Options	Personal Performance Measure associations filters. Allows users to filter through Performance Measures they are personally related too, directly or indirectly.
3	More Options	External Performance Measure filters. Allows users to filter through all Performance Measures and the people they are assigned to, whether or not they are associated to them.

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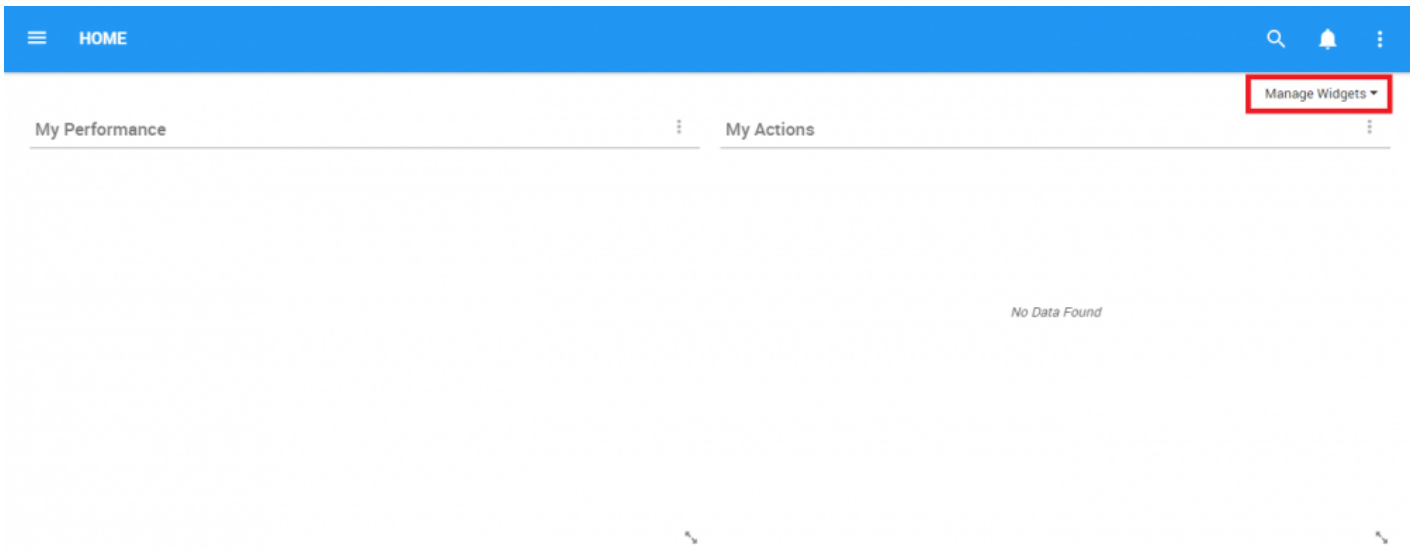
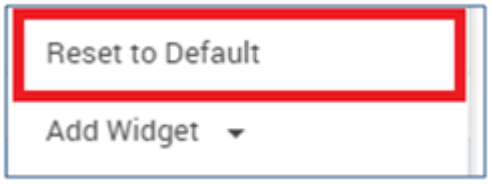
4.2.1.5 How to Reset Default Widgets

The EPC 10 comes with a default reset function available to users to reset their Home page to the default settings implemented by their System Administrator. Please see the instructions below to reset your Home page Widgets to the default settings.

1. Navigate cursor to the “Manage Widgets” button at the top right corner of the window



2. Select the “Manage Widgets” icon which will generate a drop-down menu



3. Select the “Reset to Default” button. The page will automatically refresh and the default Widgets will be reset on Home page.

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4.2.1.6 How to Relocate Widgets within Home Page

Users can customize the layout of their home page for an optimal interactive experience. Widgets can be moved in the home page, adjusted left, right or center, as well as resized to display more or fewer widgets on the user's home page. Here are the 3 main categories of layout options

- 1. Default Widget Layout*
- 2. Centralized Widget Layout*
- 3. Resized Widget Layout*

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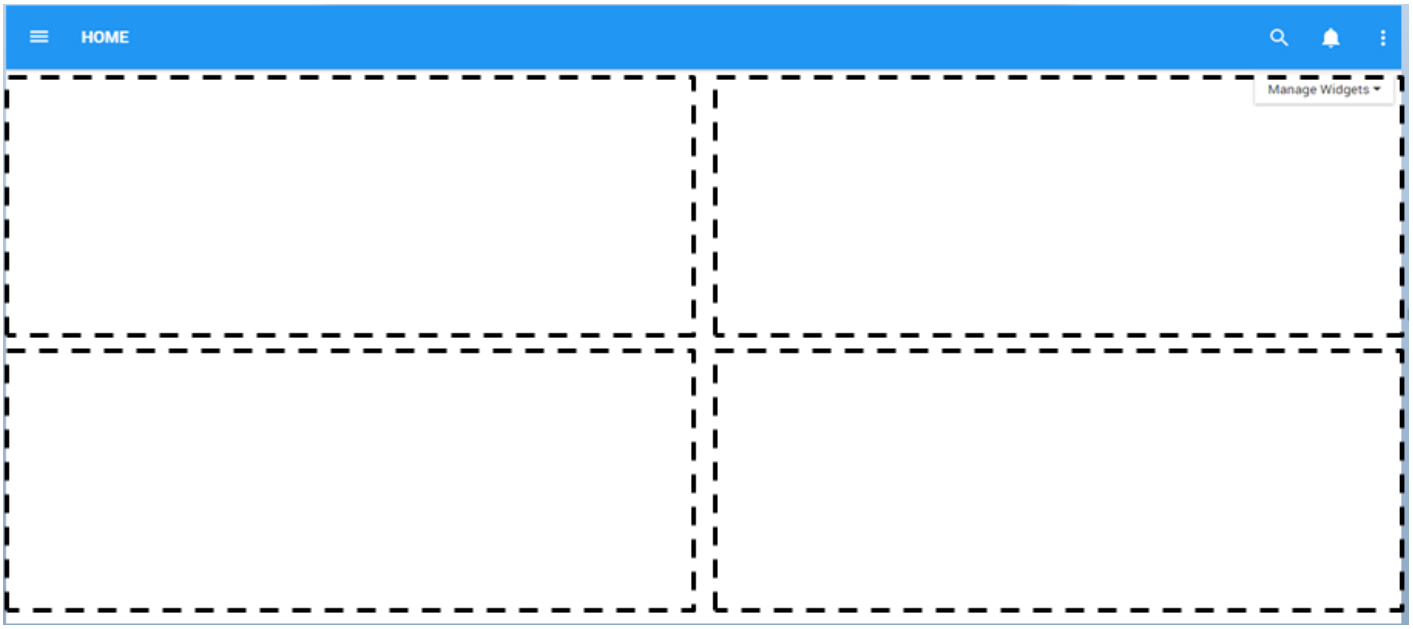
4.2.1.6.1 Layout Options

Default Widget Layout

The Home page can feature up to 4 Widgets at a given time in the following layout



Centralized Widget Layout

Users can center a Widget within a page. This provides a centralized view of a specific Widget, but comes at the expense of featuring additional Widgets on the page.

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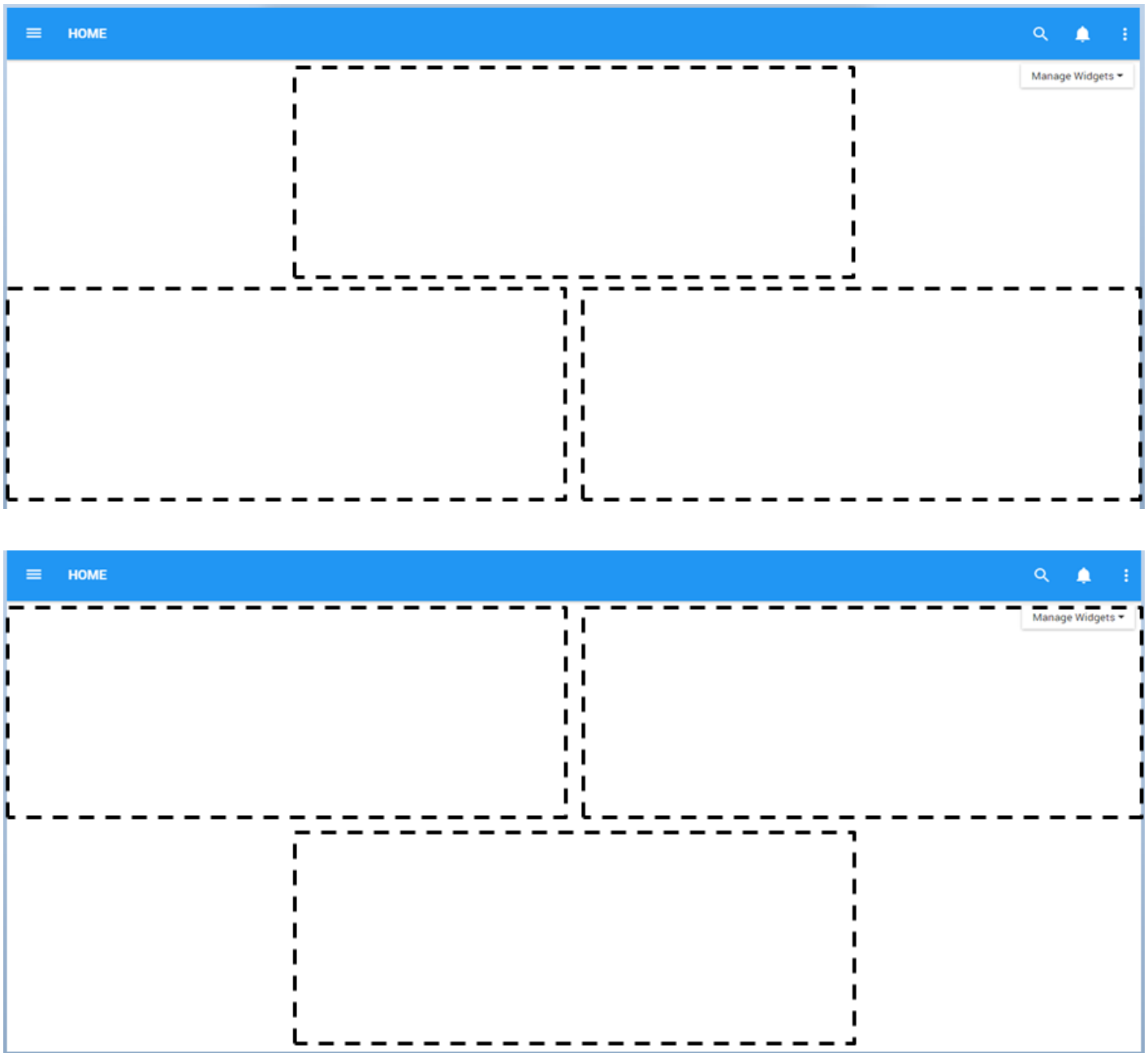

Resized Widget Layout

Widgets can be re-sized to be enlarged, or reduced in size for optimal viewing. Resizing, which will be further explained below, enables the following viewing options for users.

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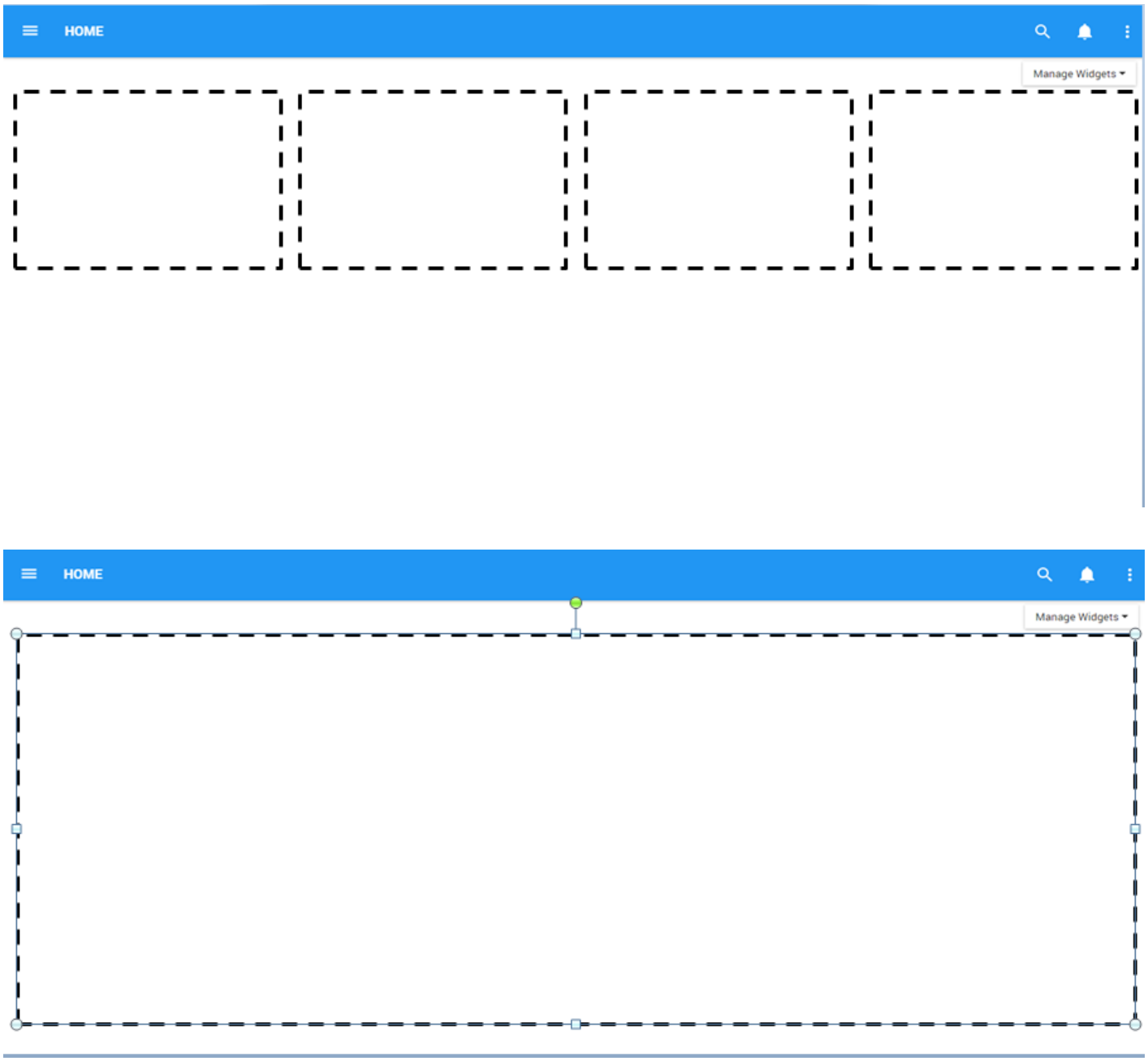

Users can Resize Widgets by using the icon located at the bottom right corner of the Widget. Simply click on the icon and drag the window diagonally until the desired size is reached.

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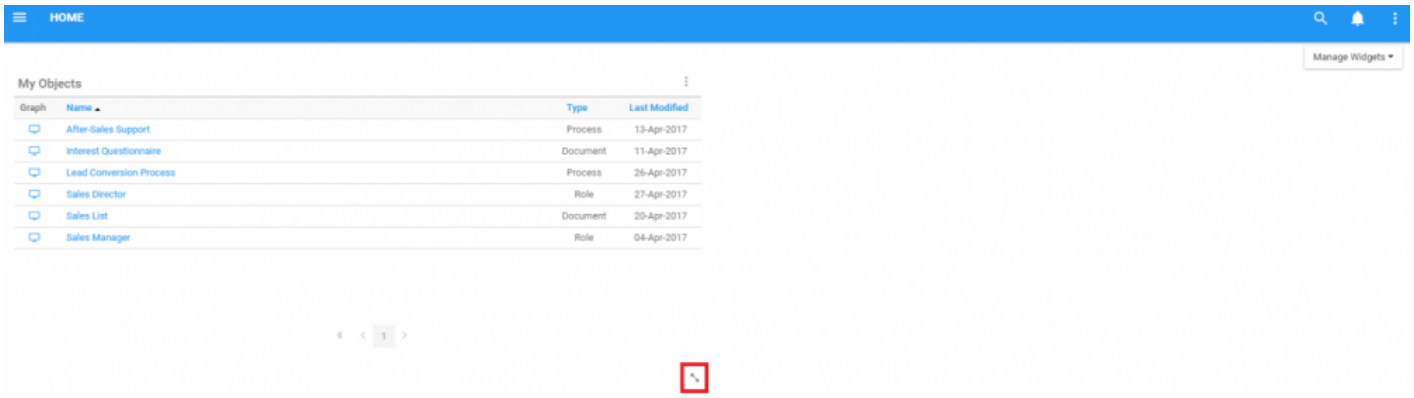
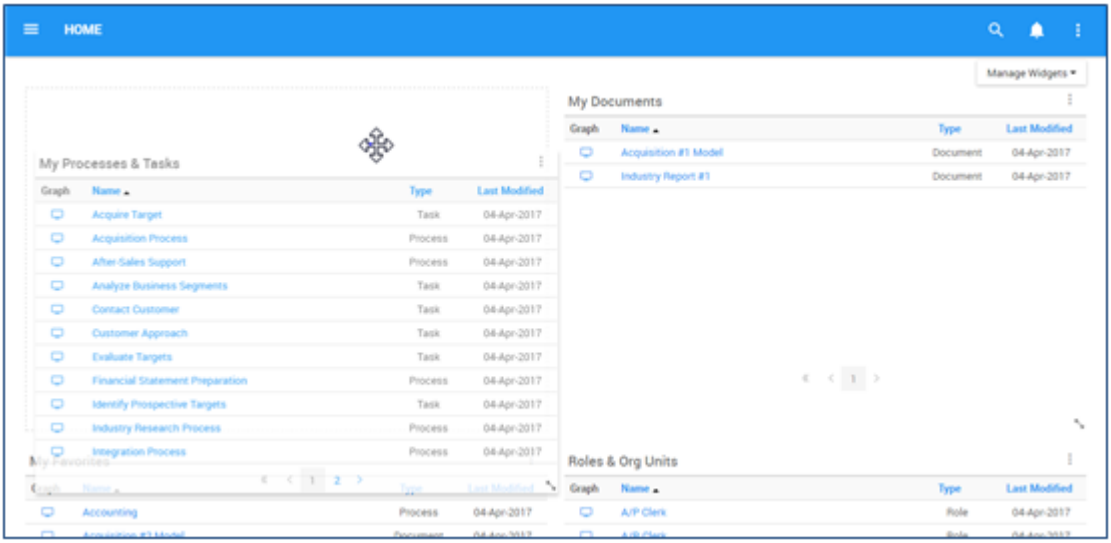

HOME
Manage Widgets
My Objects
Graph
Name
Type
Last Modified
After-Sales Support
Process
13-Apr-2017
Interest Questionnaire
Document
11-Apr-2017
Lead Conversion Process
Process
26-Apr-2017
Sales Director
Role
27-Apr-2017
Sales List
Document
20-Apr-2017
Sales Manager
Role
04-Apr-2017

4.2.1.6.2 Moving Widgets within a Home Page

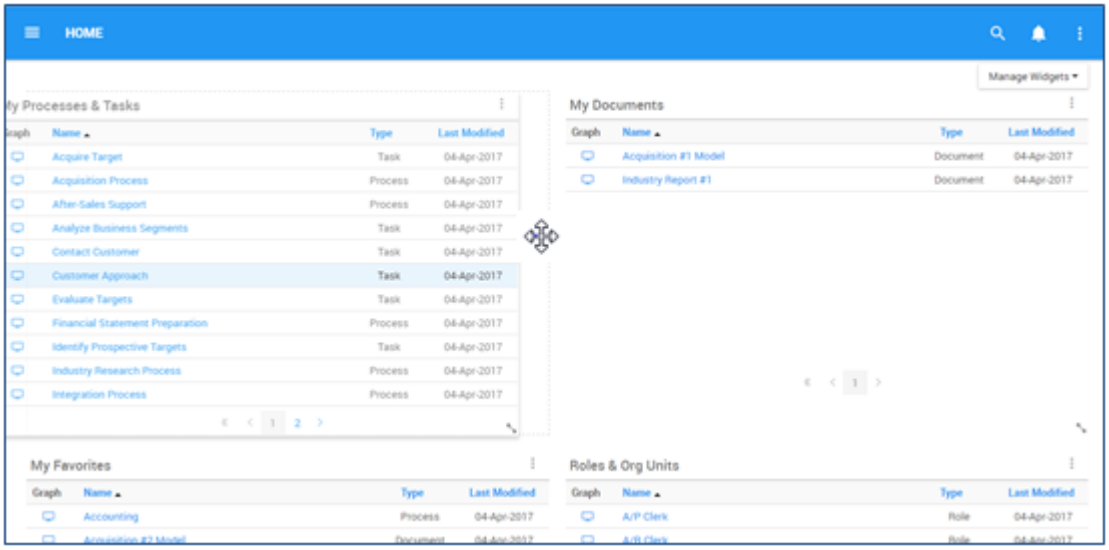
Widgets featured on a Home page can be relocated based on user preference of need. Please see the instructions below for full details on Widget relocation

1. Navigate cursor to the extremity of a particular Widget's border. Navigate cursor until the icon is seen. Note that this can be accomplished on all 4 borders of a Widget. Please see Case A & B as examples of this below.

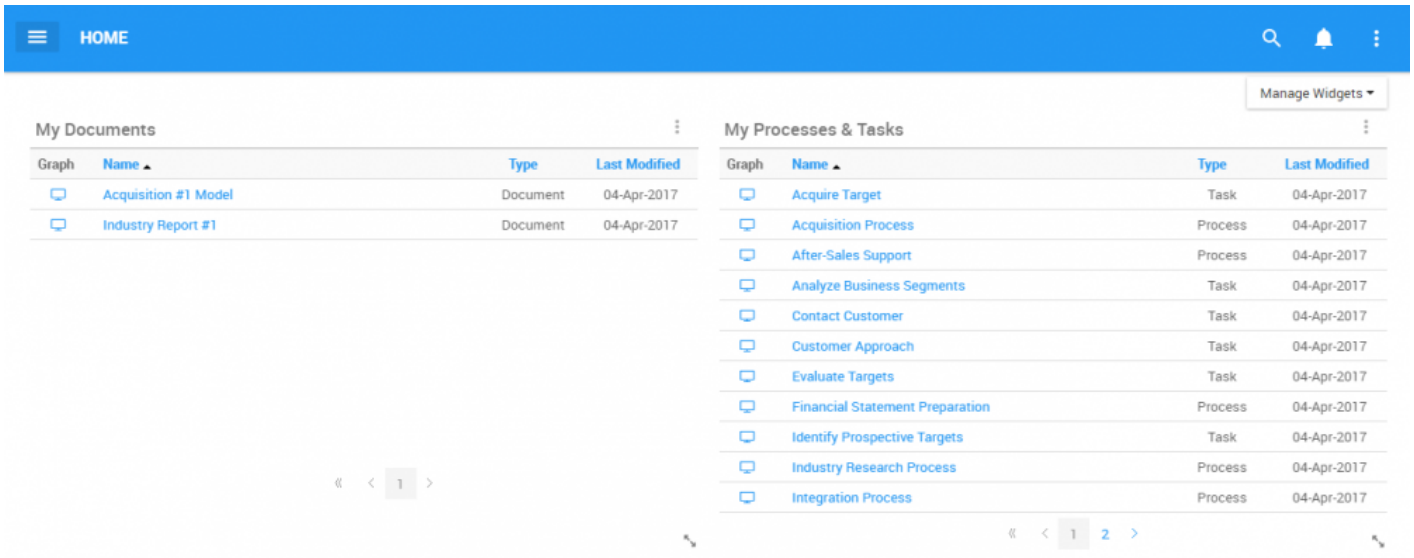
Case A



Case B



2. Select the Widget and relocate it to the desired section of the page. This can be any outlined Widget section within a page. If the desired section is currently occupied by a Widget, the Widgets will exchange places once the function is performed.



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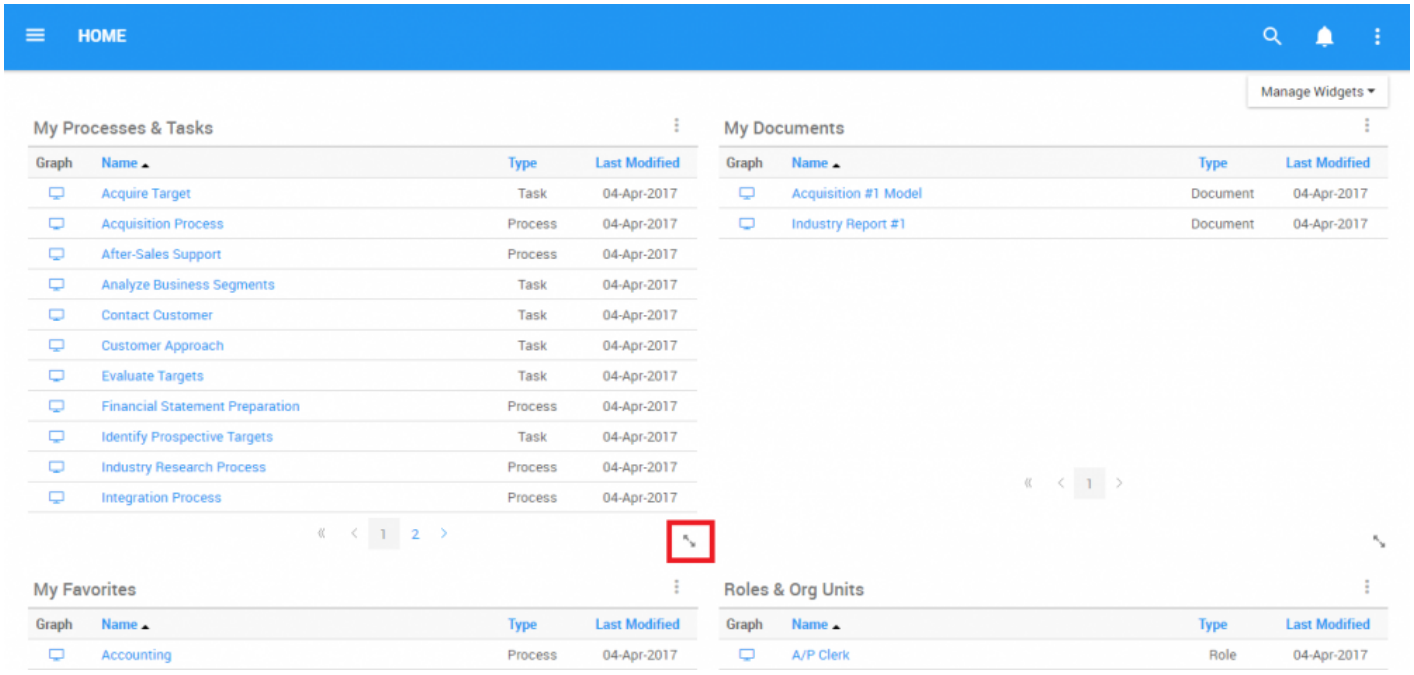
4.2.1.7 Resizing Widgets

Widgets can be re-sized within a page to optimize the Home page of each individual user. Please see the instructions below to re-size Widgets.

1. Navigate cursor to resize icon at the bottom right-hand corner of a Widget



2. Select the icon and resize the Widget by moving the cursor around on the screen in front.

Resizing will allow users to feature up to 4 Widgets in a row, with no limitation per column. Resizing can also allow users to enlarge a particular widget, allowing it to be featured across the complete screen of a user as listed above in the **Layout Options**.

Mobile: Mobile layout will depend on the screen size on the smartphone or tablet being used. Users will be provided with a fixed layout, based on their mobile device that maximizes the use of the available screen space. This layout will be fixed.

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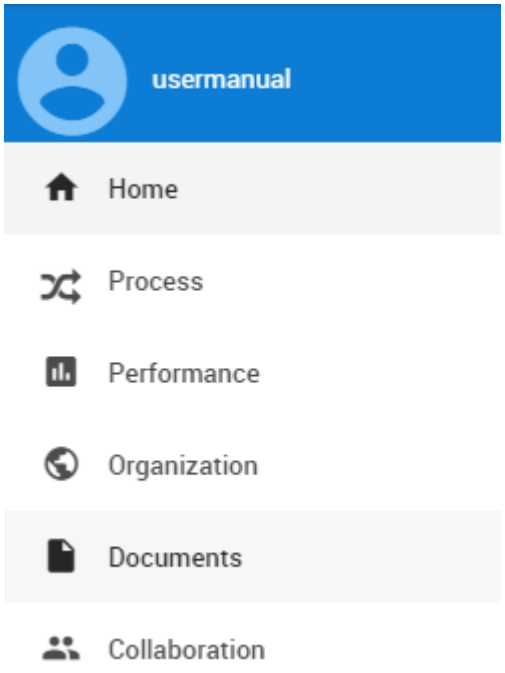
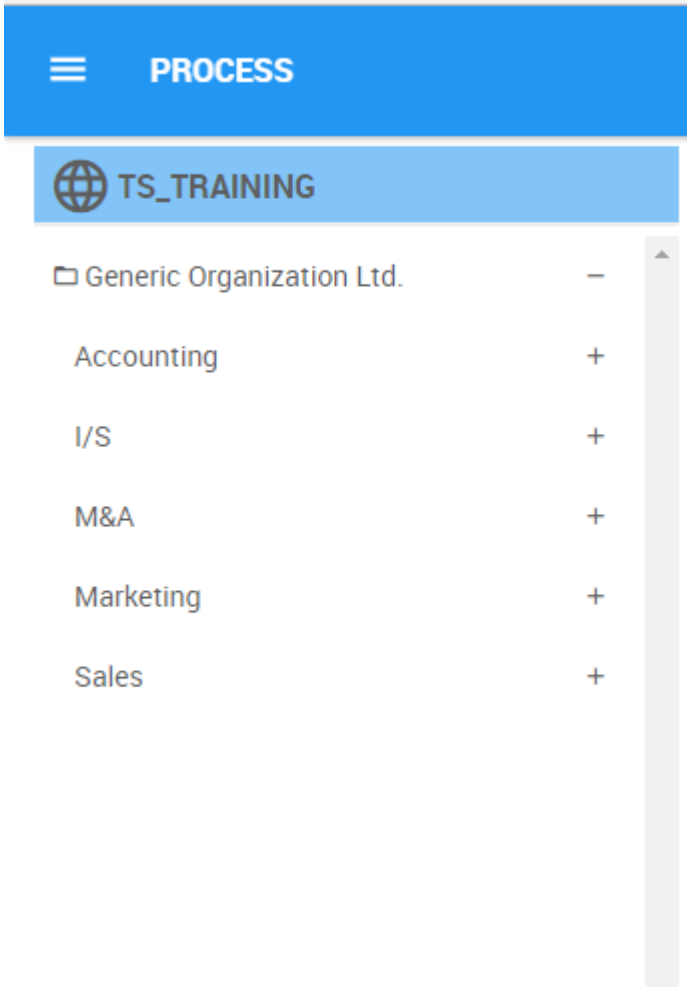
4.3 General Navigation

General navigation within the EPC Web App uses a **Menu Navigation System**. The Tree Navigation System provides a simple navigation window allowing users to navigate to various Modules and within the Modules themselves. The Tree Navigation System provides 2 major navigation Menus:

1. Navigation Between Modules



2. Navigation Within a Module



Both Items within the EPC follow a hierarchy format, allowing users to easily navigate between components of the EPC.

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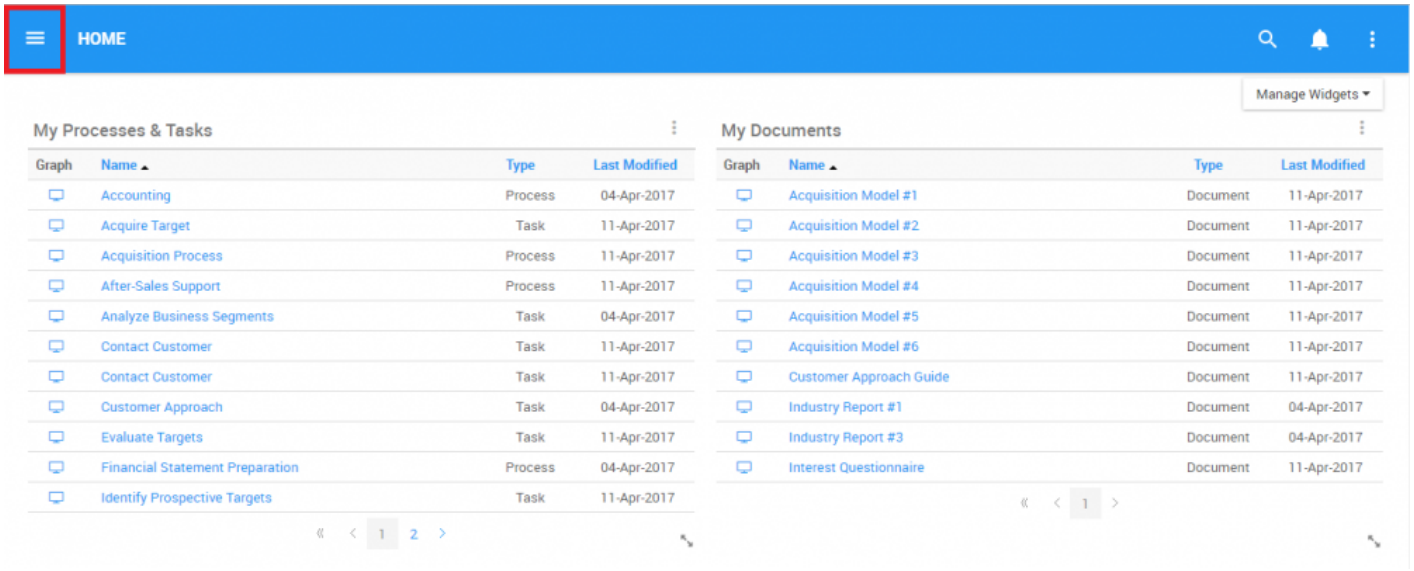
4.3.1 Navigation between Modules

The Navigation Menu allows users to quickly navigate between EPC Modules.

Please see the following steps to access and use the Navigation Menu:

1. Click on the **Navigation Menu Button** on the top left of your screen



2. Click the Navigation Menu, and Navigation Panel will be generated on the left-handed side of the screen

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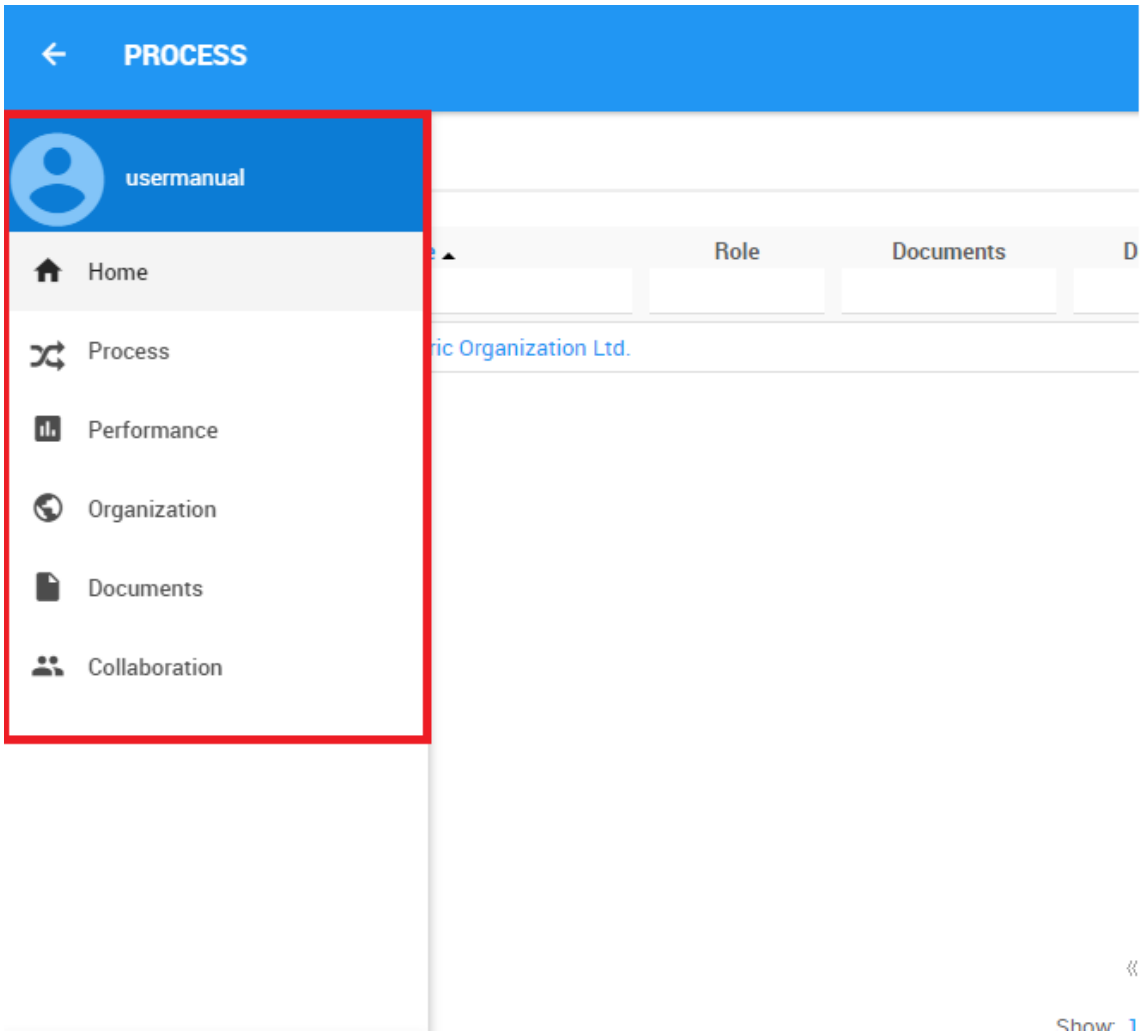

3. To close the Navigation Menu, click on the icon at the top-left of the page

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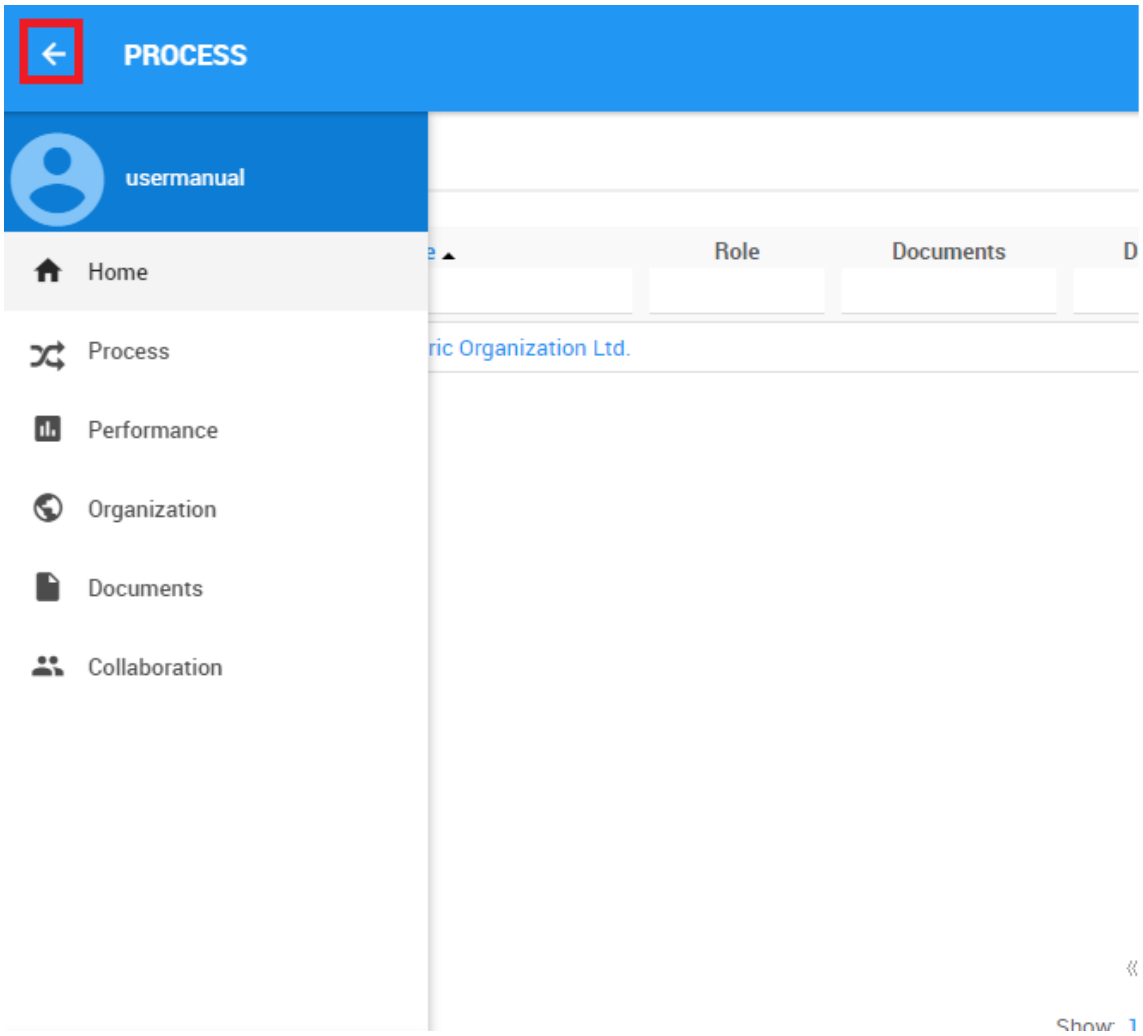

PROCESS
usermanual
Home
Process
Performance
Organization
Documents
Collaboration
Role
Documents
ric Organization Ltd.

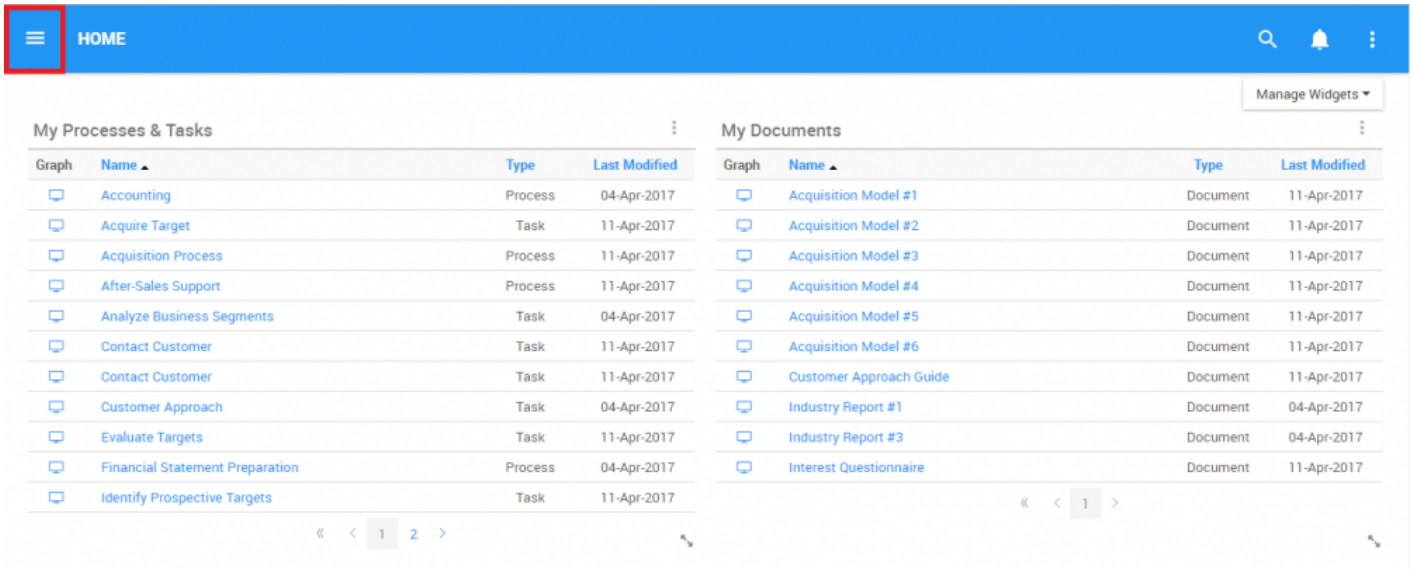
4.3.2 Navigation within a Module

The **Navigation Tree** can be used to help users navigate between different elements within a specific EPC Module. The Tree allows users to navigate through module components following the hierarchy set by process and system modelers.

To use the Navigation Tree, please see the following steps:

For this example we will use the Process Module. Note that Navigation is all modules mirrors the following instructions.

1. Click on the Navigation Menu Button on the top left of your screen



2. Click the Navigation Menu, and Navigation Panel will be generated on the left-handed side of the screen

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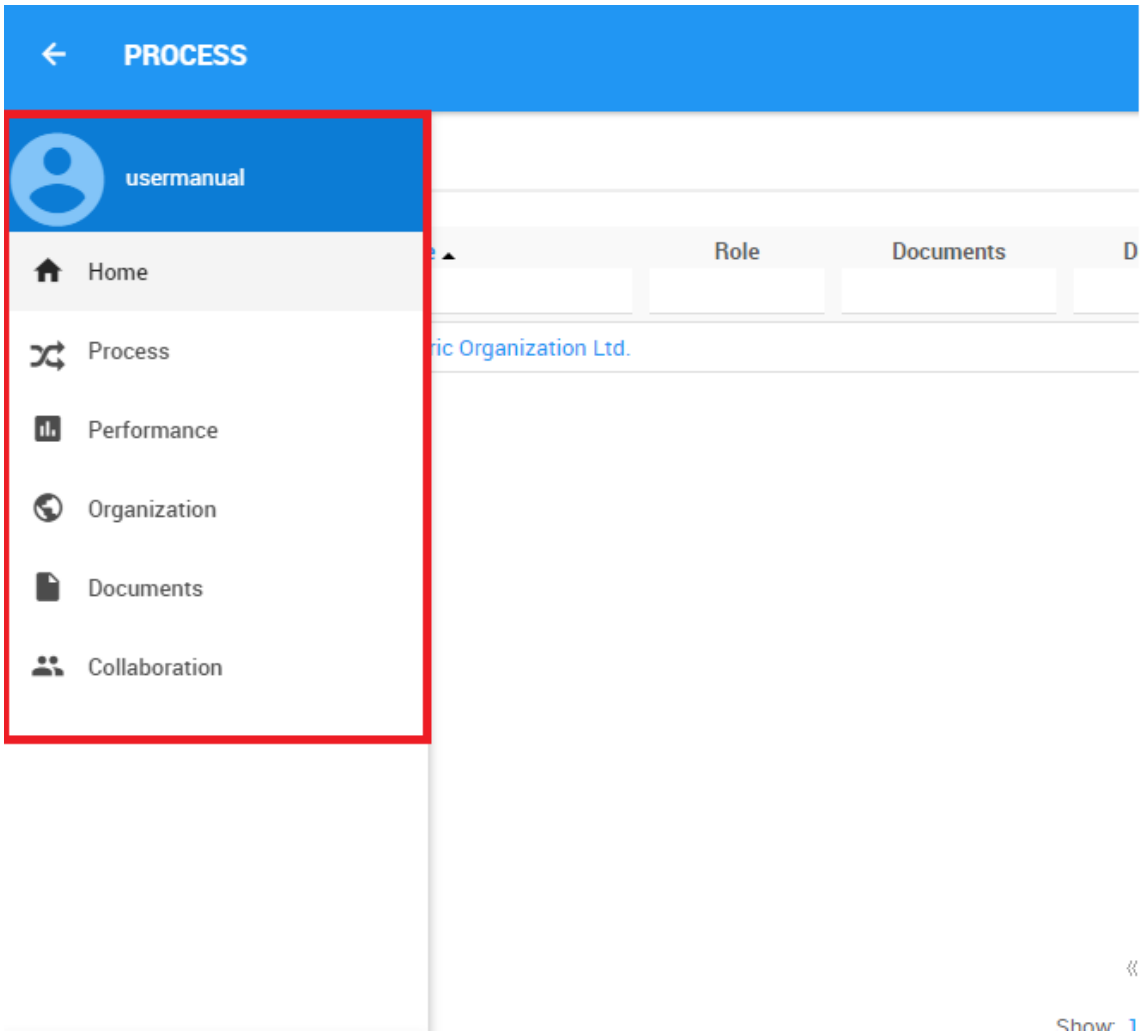
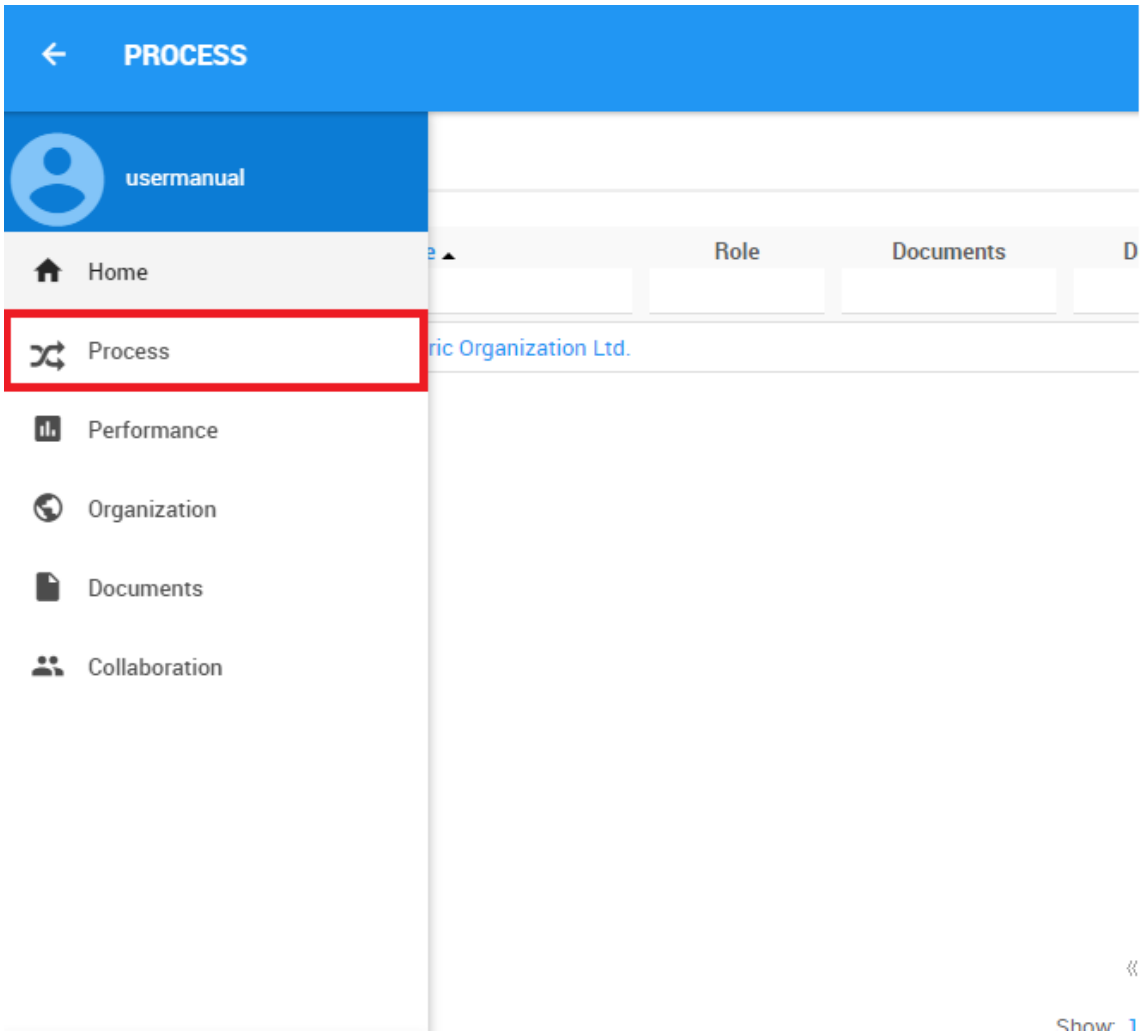
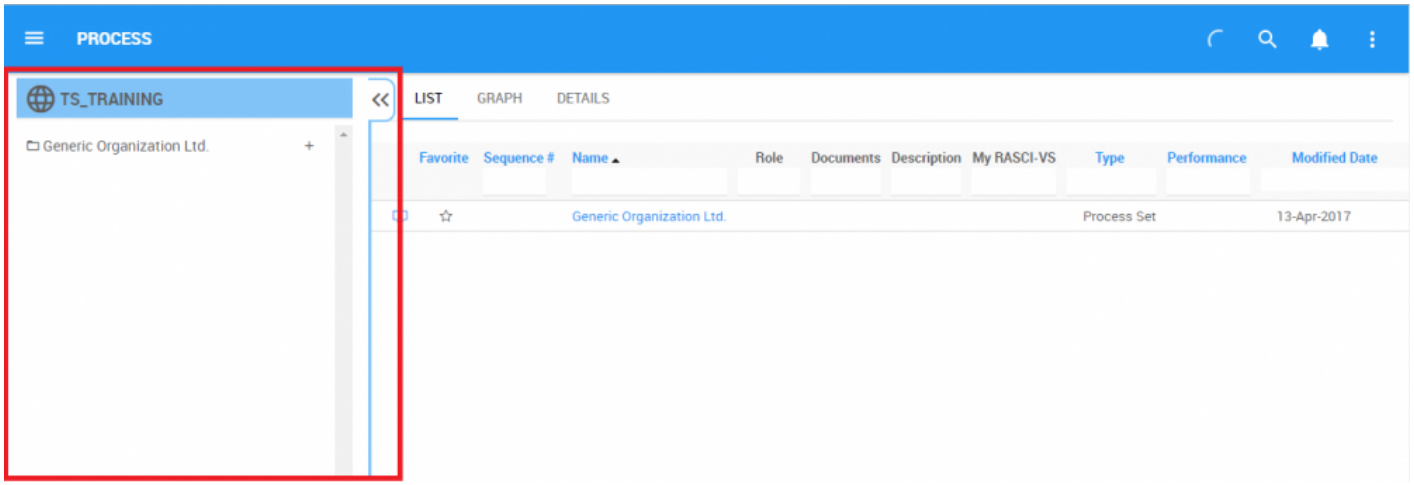


3. Select the Process Module



4. Upon selecting a Module, the Navigation Menu will be automatically closed, and the Navigation Tree will can be opened.



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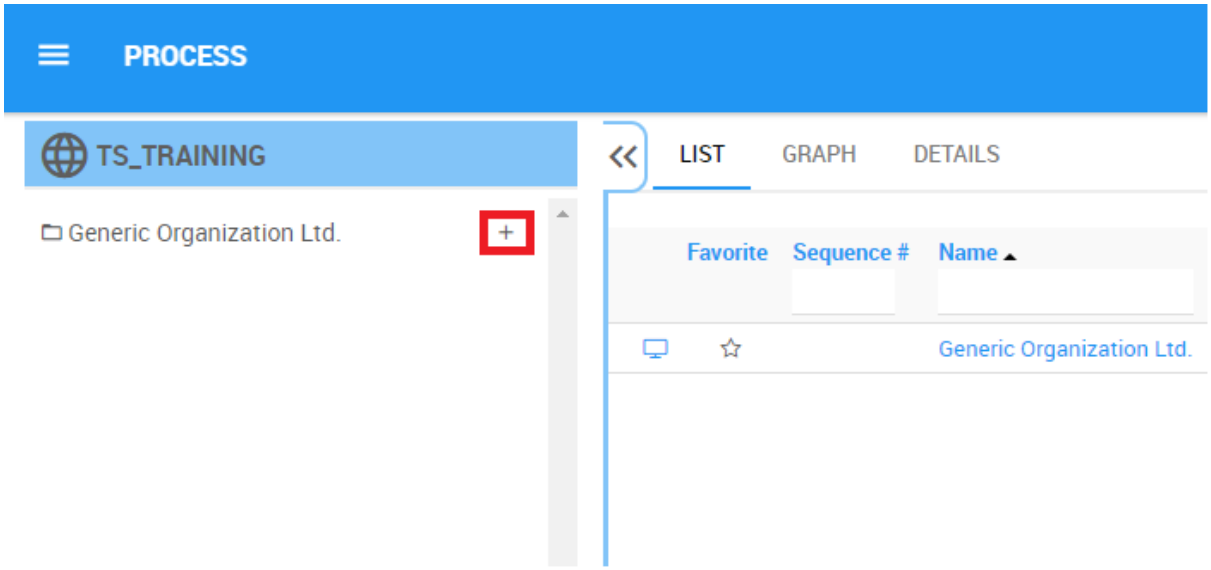
The name highlighted in blue TS_TRAINING represents the environment you are currently in.

5. To further navigate items within the Navigation Tree, click on the + icon.



6. Clicking this icon will generate a list of all sub-items

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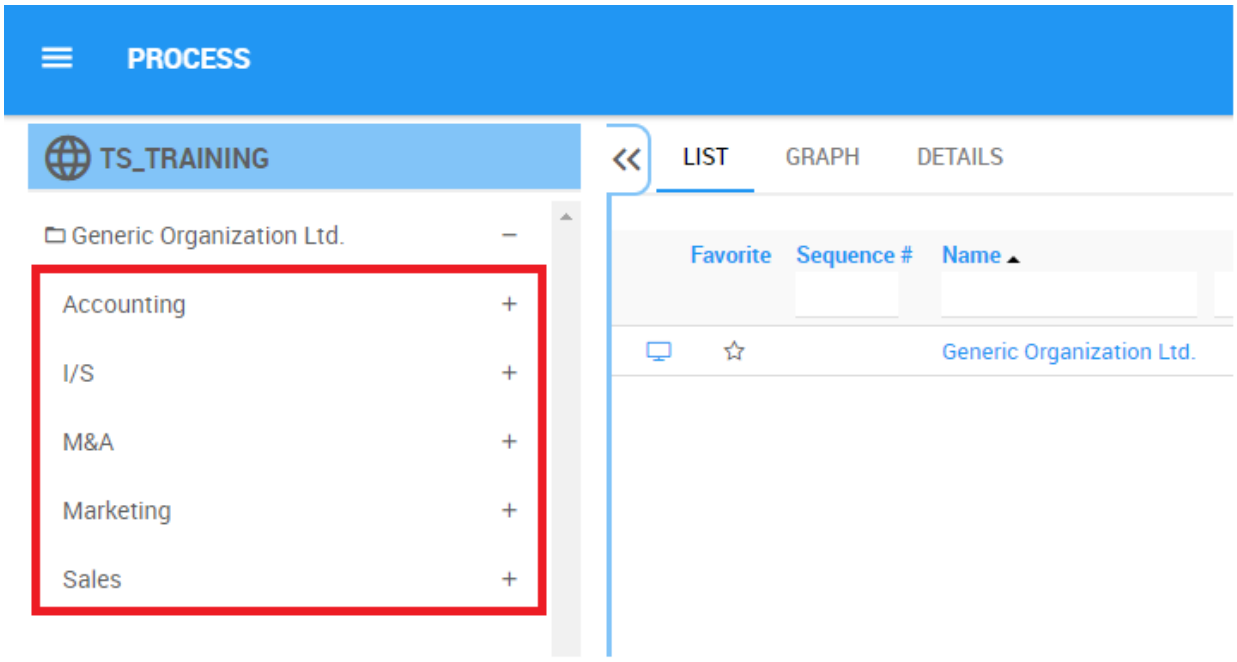
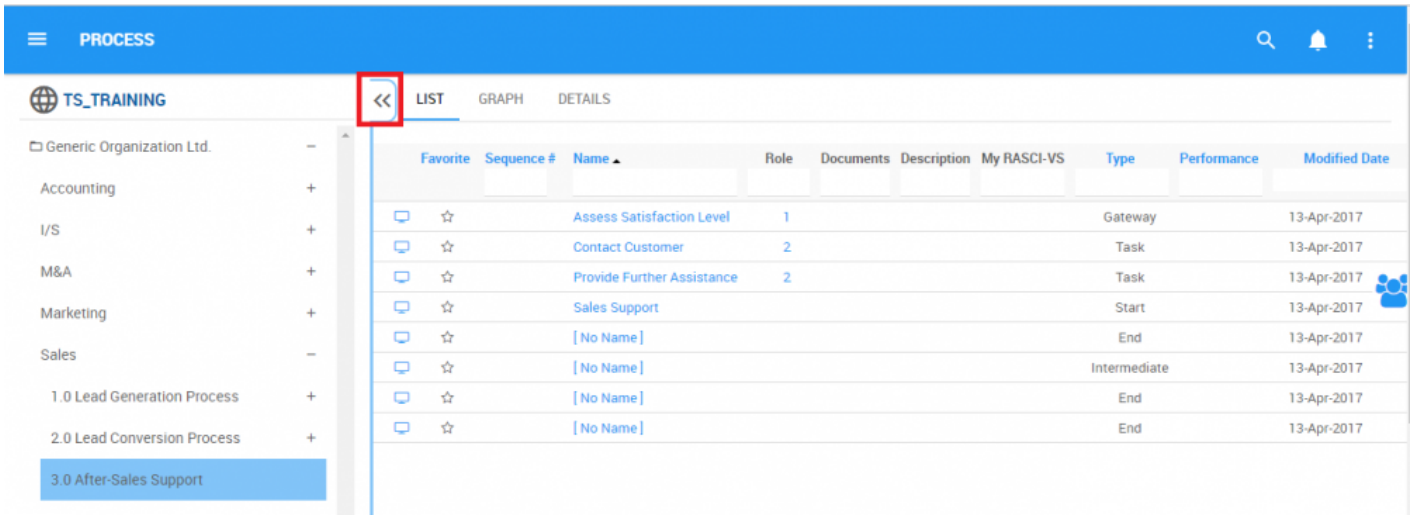


7. User dive in further within itemized lists by expanding items using the + icon, and can retract viewing by using the − icon.

8. Selecting any item within the Navigation Tree will prompt a user to the items List View page.

9. To close the Navigation Tree, select the « icon



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4.4 Process

The Web App allows users to view their business processes in a customizable and color coded environment. Process viewing is the primary function of the Web App in the EPC. The Web App allows users to view, monitor, and optimize business processes. The EPC provides 3 types of graphs for business processes:

1. Map Graphs (Default View)
2. Impact Graphs
3. Hierarchy Graphs

These views have various view-specific options that the user can define to display the process in a way that suits them best. For example: content, or objects, that are associated to the flow-objects can be shown as icons or annotations.

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4.4.1 Module Overview

Process viewing is a key function of the Web App in EPC and allows users to view personal, role and specific company processes. The Web App provides the users with 3 different viewing options to better understand business processes.

Dimension	Details
1. List	Provides view of all processes that you have access to including the flow objects within them
2. Graph	Provides the visual BPMN representation of processes, their features and links (Impact, Map and Hierarchy Graphs)
3. Details	Provides additional key information regarding specific process and sub-process details

Processes that have been published from the EPC Modeler can be viewed in this module.

How to access the Processes module:

1. Click on the **Navigation Menu Button** on the top left of your screen.

or

2. Click on **Process**

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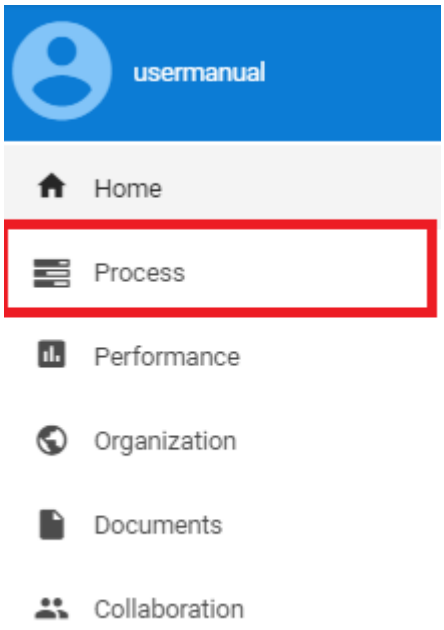

3. By default, you will be directed to **List View** in the Process module (as shown below).

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4.4.2 List

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

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

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

List	Description
1. List All	A list view where **all** items within the given module are listed
2. Drilldown List	A list view where **all levels below** the selected item are listed
3. Contextual List	A list view where **1-level level below** the selected item are listed

List Components

Component	Description
Favorite	Allows users to sort processes by favorites vs. non-favorites
Sequence #	Allows users to sort processes chronologically by associated sequence number
Name	Textual search for any existing name of an object
Roles	Whether or not there are Roles directly associated with the item in question
Documents	Whether or not there are Documents directly associated with the item in question
Description	Whether or not there is a Description inputted for the item in question
My RASCI-VS	The RASCI-VS associations existing on the item in question
Type	The type of the object
Performance	The performance attributed to the process or object in question
Modified Date	The last date that the object in question was modified
Status (Available in Show Latest)	View the status of the item in question (Published vs. in-progress)

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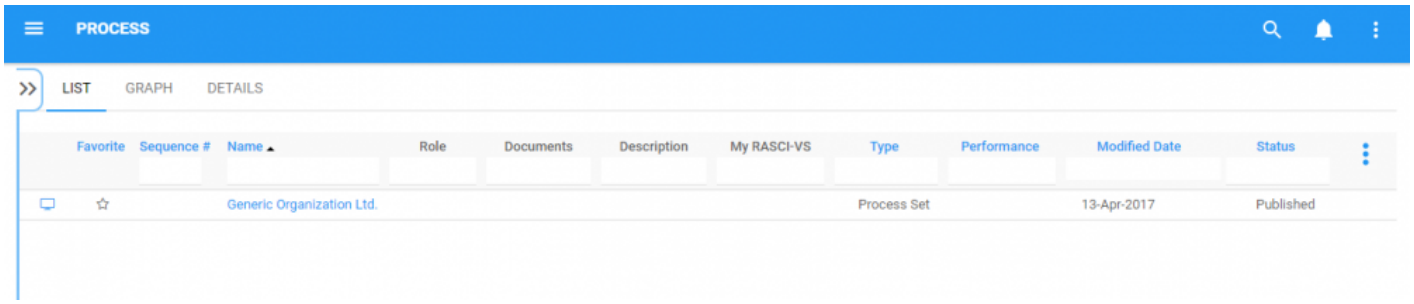
> The number of columns displayed will be contingent on the user's screen resolution.

To navigate to List View, please see the steps below:

1. Click on the **Navigation Menu Button** on the top left of your screen

2. Click on **Process**

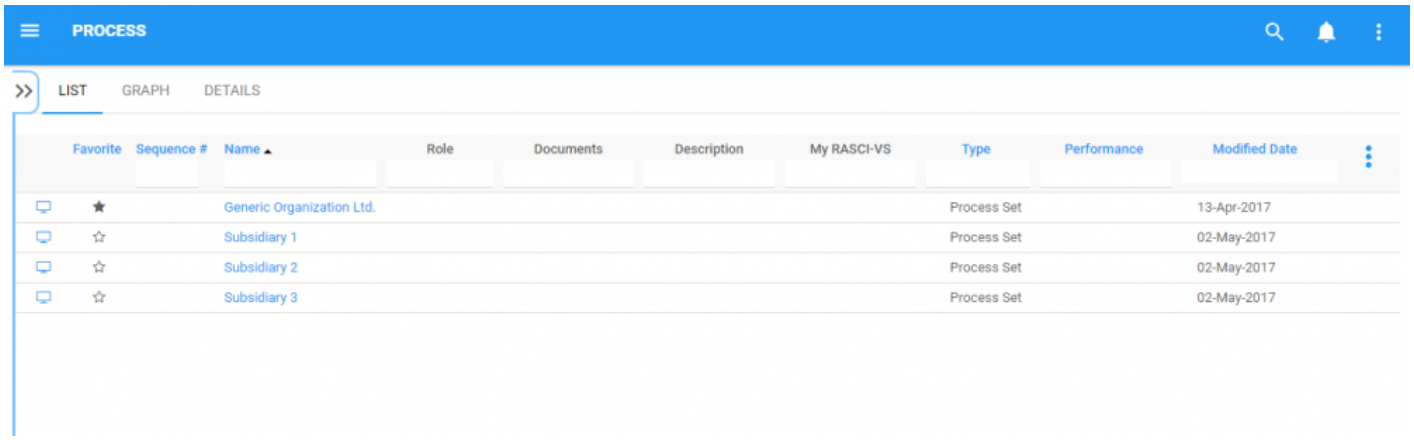
3. You will be directed to **List View** in the Process module (as shown below).



Upon navigating to the Process Module, users will view all major processes that they are associated to.

To simplify process viewing; users **are not** shown all major sub-processes and tasks that they are associated to. However users can display these sub-processes and associated objects within the **List View**. Please see the **Optional** steps below:

4. **(Optional)** To view sub-processes, users must select the "Drill Down" icon available on the upper right to the EPC Web App.



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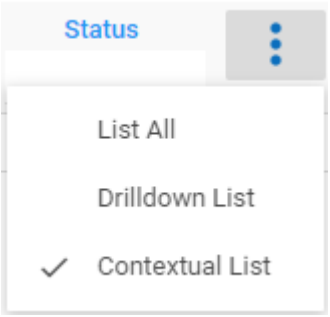
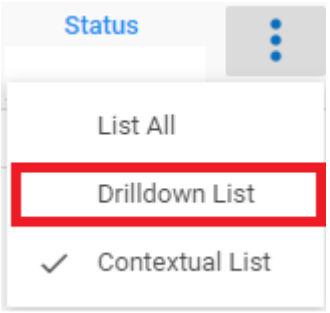
5. **(Optional)** Click on the icon and it will generate a drop-down menu



The selected list view will be save both by web browser and by user.

These steps are only required if a user is using an account or browser for the first time. As noted above, list preferences will be saved by user and browser to simplify navigation.

6. **(Optional)** Select “Drilldown List”



7. **(Optional)** Upon selecting the “check box”, the EPC will automatically re-fresh the page

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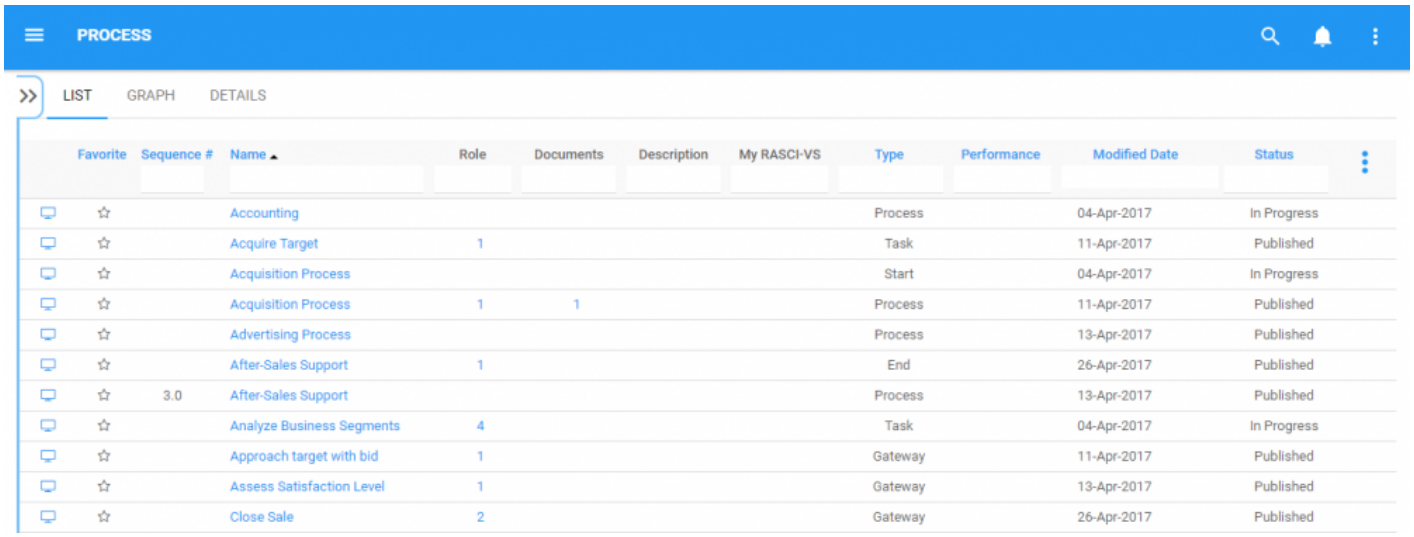

Favorite	Sequence #	Name	Role	Documents	Description	My RASCI-VS	Type	Performance	Modified Date	Status
		Accounting					Process		04-Apr-2017	In Progress
		Acquire Target	1				Task		11-Apr-2017	Published
		Acquisition Process					Start		04-Apr-2017	In Progress
		Acquisition Process	1	1			Process		11-Apr-2017	Published
		Advertising Process					Process		13-Apr-2017	Published
		After-Sales Support	1				End		26-Apr-2017	Published
	3.0	After-Sales Support					Process		13-Apr-2017	Published
		Analyze Business Segments	4				Task		04-Apr-2017	In Progress
		Approach target with bid	1				Gateway		11-Apr-2017	Published
		Assess Satisfaction Level	1				Gateway		13-Apr-2017	Published
		Close Sale	2				Gateway		26-Apr-2017	Published

Please see the Sorting and Filtering sections below for further detail.

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4.4.2.1 Sorting

Sorting allows users to classify processes based on selected criteria. You can **sort** list results for any column title that is written in BLUE.

The following are the fields that users can use when sorting through Processes in List View:

Filter	Details
Favorite	Allows users to sort processes by favorites vs. non-favorites
Sequence #	Allows users to sort processes chronologically by associated sequence number
Name	Allows users to sort processes by a key number or word within process names
Type	Allows users to sort processes by their specific type
Performance	Allows users to sort through processes based on their associated performance (Green, Yellow, Red) based on attached KPI, KCI, KRI
Modified Date	Allows users to sort processes chronologically by date last modified
Status (Available in Show Latest)	View the status of the item in question (Published vs. in-progress)

How to use "Sorting" Function

1. Navigate to the Process Module

2. Navigate Cursor to desired **Category**

3. Click on the **Category**

1-Click will sort the Category in Ascending order, reflected by ▲
2-Clicks will sort the Category in Descending order, reflected by ▼
3-Clicks will Remove the sorting action

Ascending Example: The Name column is sorted in **ascending** order. Notice the process names are listed as "1, 2, 3, A, B, C".

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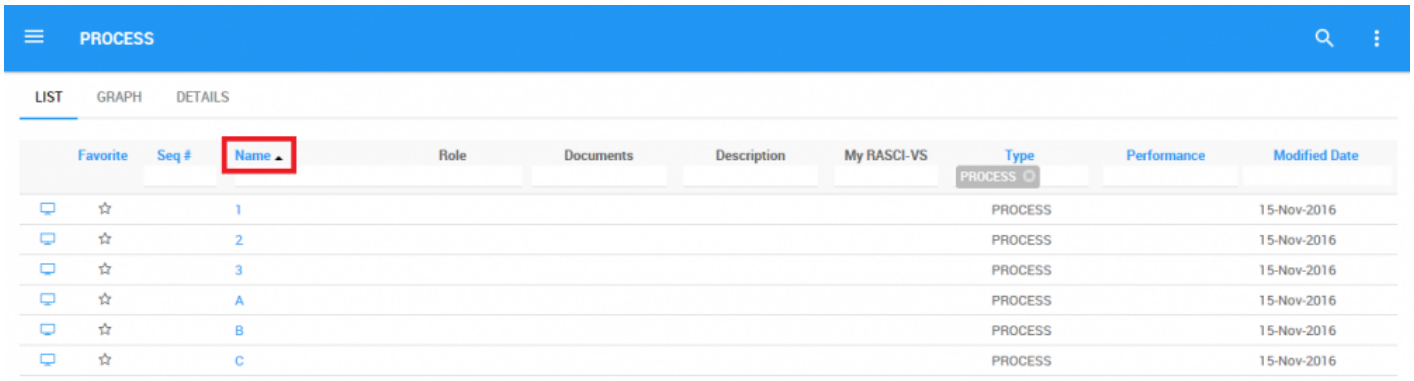
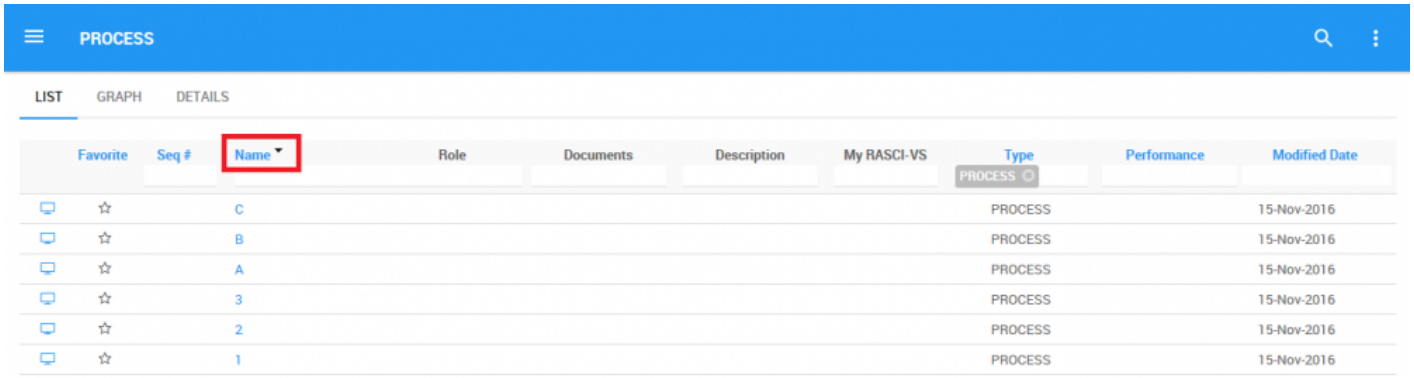


Descending Example: The Name column is sorted in **descending** order. Notice the process names are listed as “C, B, A, 3, 2, 1”.



Multi-sorting (sorting multiple columns) is available.

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4.4.2.2 Filtering

Filtering is a useful way for you to extract a specific subset of EPC content based on conditions related to what you need to find or view.

You can filter the Process list by sequence number (Seq#); Name; Role; Documents; My RASCI-VS; Type (Process or Flow Object); Performance; and Modified Date.

Column	Options
Seq # (Sequence Number)	Allows users to filter objects based on pre-established sequence. Any existing sequence #. i.e. 1, 1.1, 3.4, 6.7.3, A.1.4, A.B.C
Name	Textual search for any existing name of an object
Role	Empty – The object has no associated roles Not-Empty – The object has at least one associated role
Documents	Empty – The object has no associated documents Not-Empty – The object has at least one associated document
Description	Empty – The object has no written description Not-Empty – The object has a written description
My RASCI-VS	Responsible Accountable Support Consulted Informed Verifier Signatory
Type	Process (default) Process Set Reference Task Start Intermediate Gateway End
Performance	Green Yellow Red
Status (Available in Show Latest)	View the status of the item in question (Published vs. in-progress)

The Filtering section will cover the following:

1. What are Default Filters

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2. How to Remove Filters
3. How to Add Filters
4. How to Combine Filters

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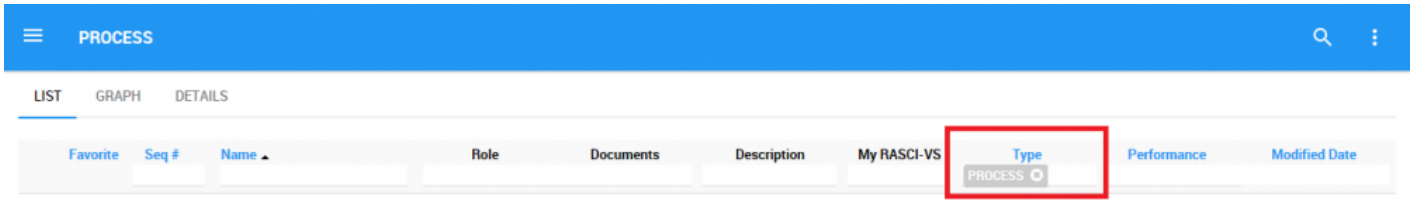
4.4.2.2.1 Default Filter

Default filters can be applied to specific sections of the EPC. By default, a filter is applied so that you only see processes upon initial loading of the module.



Since sub-processes are also processes, you must use the “PROCESS” filter.

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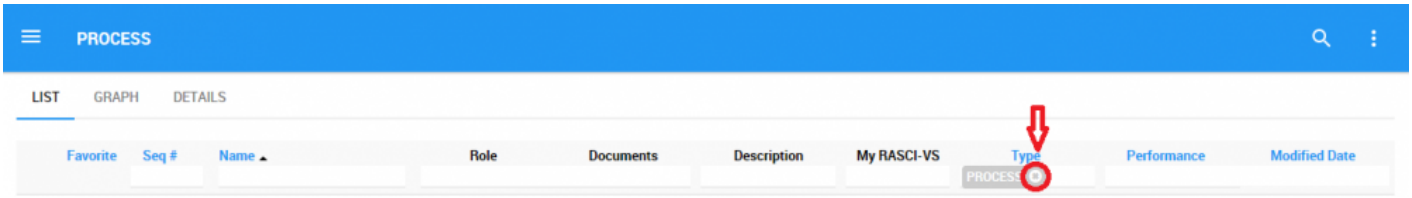
4.4.2.2.2 Remove Filter

You can remove filters; this will naturally increase the results in your list. See below to know how to add filters.

To do so, click on the button beside the filter name.



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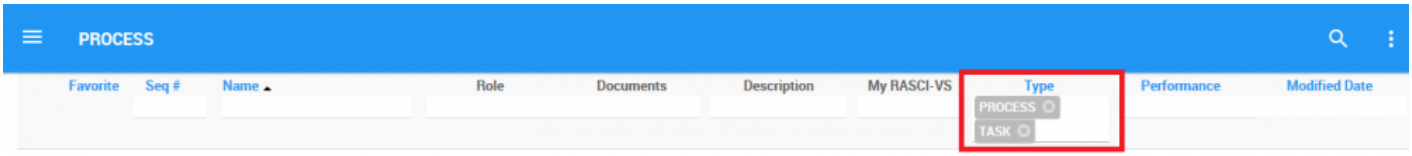
4.4.2.2.3 Add Filter

You can add filters to see processes and other *specific* flow objects of your choice. **Type** what you are looking for (Seq #, Name), **select** the filter in the drop-down menu (Role, Documents, Description, My RASCI-VS, Type, Performance), or **define the range of dates** (Modified Date).

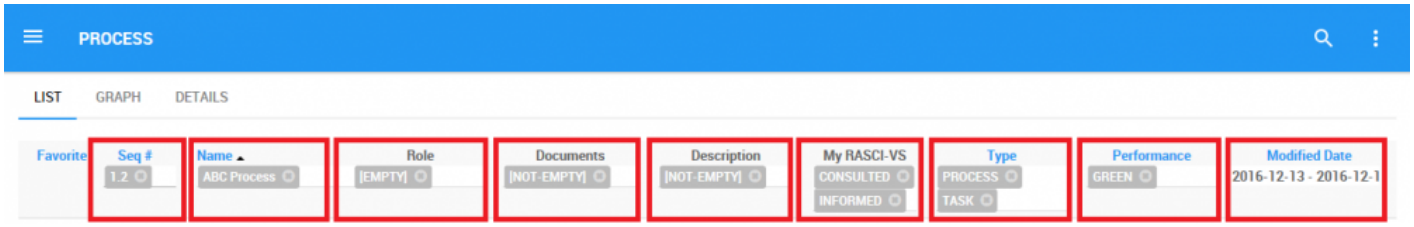
Example: Both **Process** and **Task** are included in the filter.



4.4.2.2.4 Combine Filter

You can combine filters, meaning you can add any other column filter to isolate results. See above to see how to **add** filters.

Example: The list is filtered by a **combination of filters** on each column.



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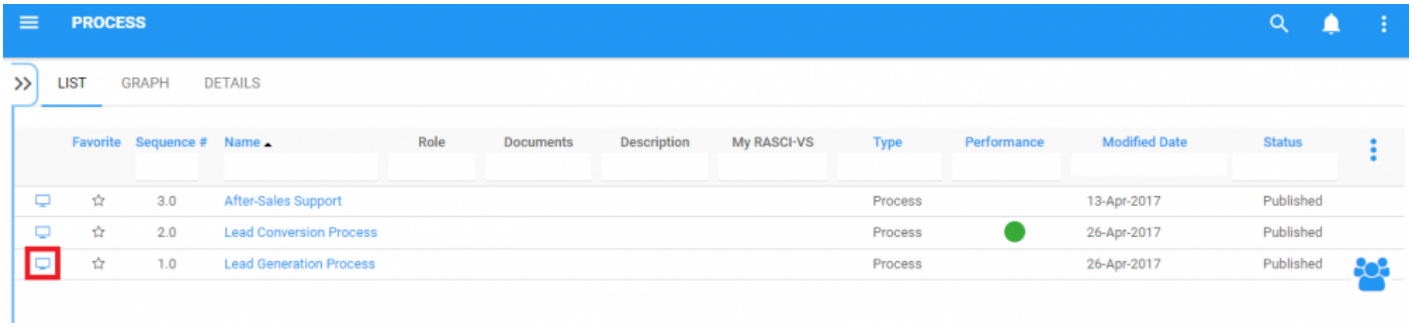
4.4.2.3 Quick Graph View

Quick Graph View is a feature of the EPC Web App that allows users to immediately view a graph associated with a process or object. While Graph's will be further explained below, the Quick Graph View allows users to quickly navigate to a Graph from "List View".

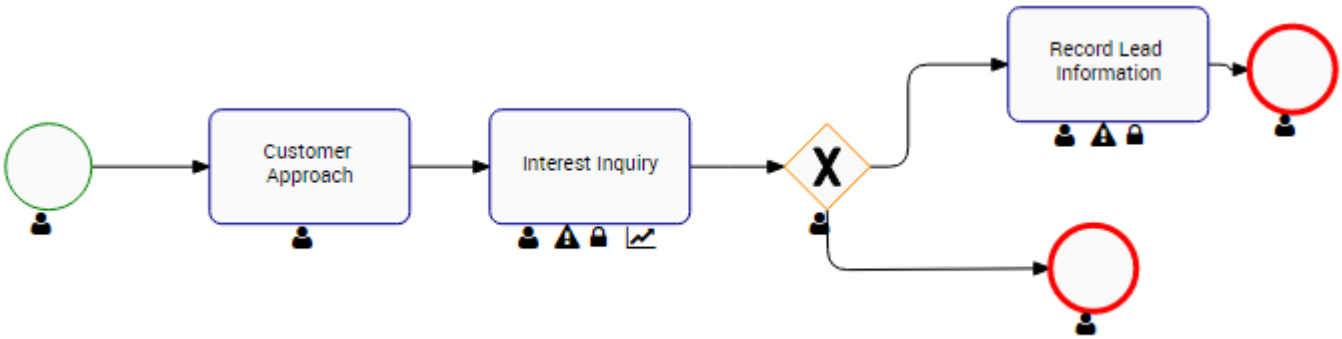
Please see the instructions below:

1. Navigate to Process Module

2. Once in List View, click on the button in the left hand column of the process you'd like to see in Graph View.



3. You will be redirected to the "Graph" page of the selected object



Please see Graph section below for further details on Graph navigation, viewing and customization.

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4.4.3 Graph

Graphs are used as the primary visual representation of business processes. Graphs allow organizations and users to map out their processes and provide key stakeholders with process-specific information. They provide users with a high-level overview of processes, the associated roles, resources and key materials and documentation.

The following will be covered in the Graph section:

1. Graph Navigation
2. Graph Types (Impact, Map and Hierarchy Graphs)
3. Graph Customization

The Graph view setting displays an expanded view of your entire process in a graphical Process Map format where flow objects and associated objects are displayed on the map based on your defined display settings.

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4.4.3.1 Graph Navigation

Understanding how to navigate to graphs and how to navigate within graphs allows users to fully utilize the EPC. Users can navigate to Graph View by using the “Quick Graph View” icon , or by manually navigating to Graph View.

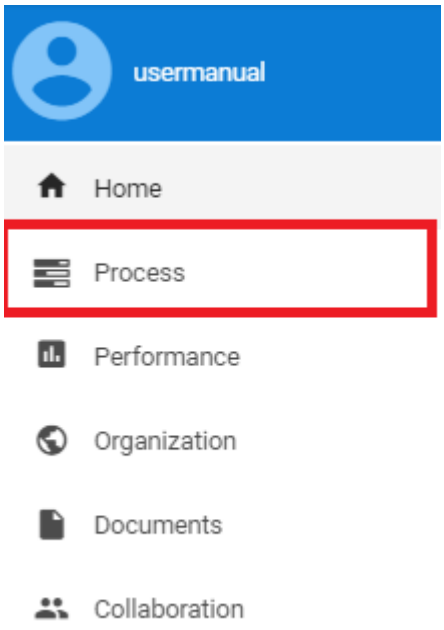
This section will outline Manual Navigation, please see “Quick Graph View section for alternative navigation options.

How to navigate to the Graph section (Manual Navigation)

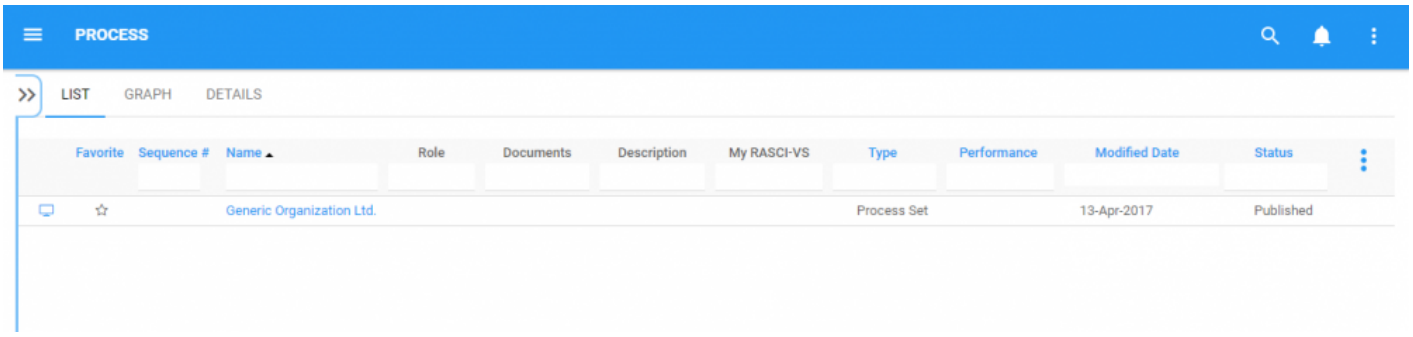
1. Click on the **Navigation Menu Button** on the top left of your screen.

or

2. Click on **Process**

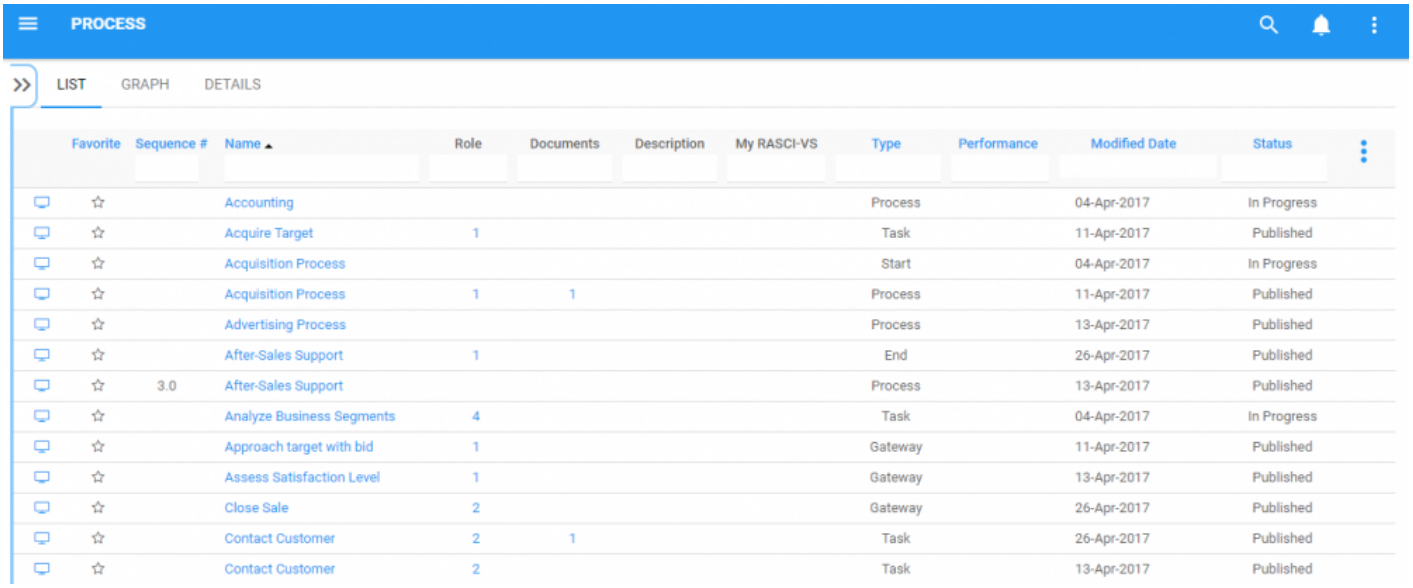


3. By default, you will be directed to **List View** in the Process module (as seen below).



4. Select a process or expand your current List View by selecting the “Drilldown List”

5. Upon selecting the “check box”, the EPC will automatically re-fresh the page to include all of the child processes and related objects.



6. Select the icon of the item you desire to select

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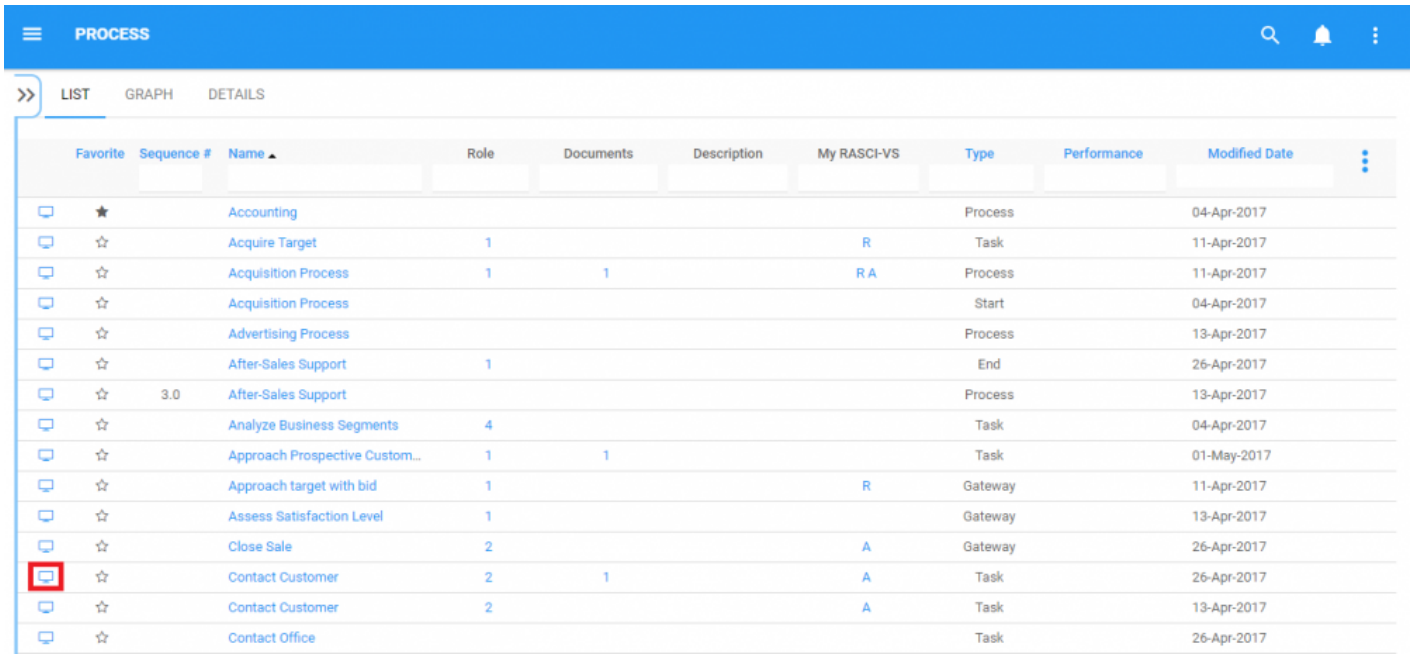
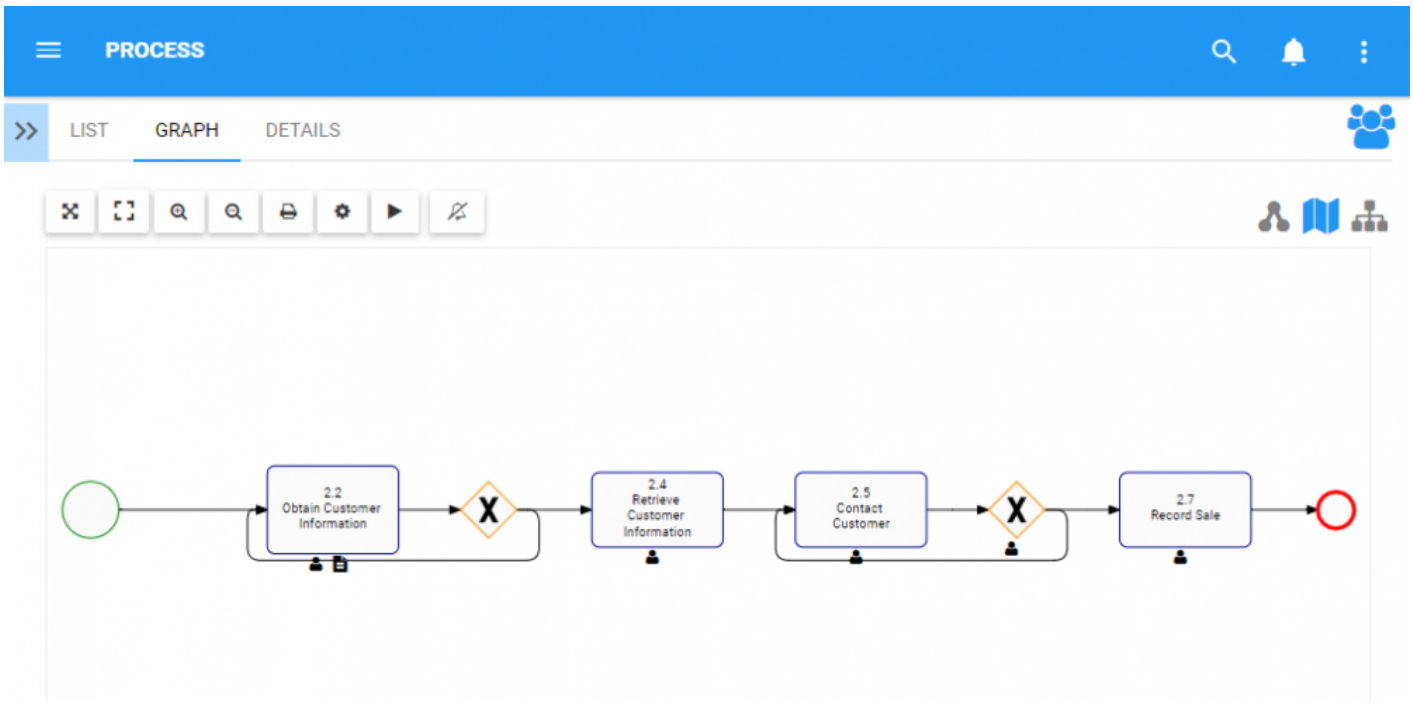


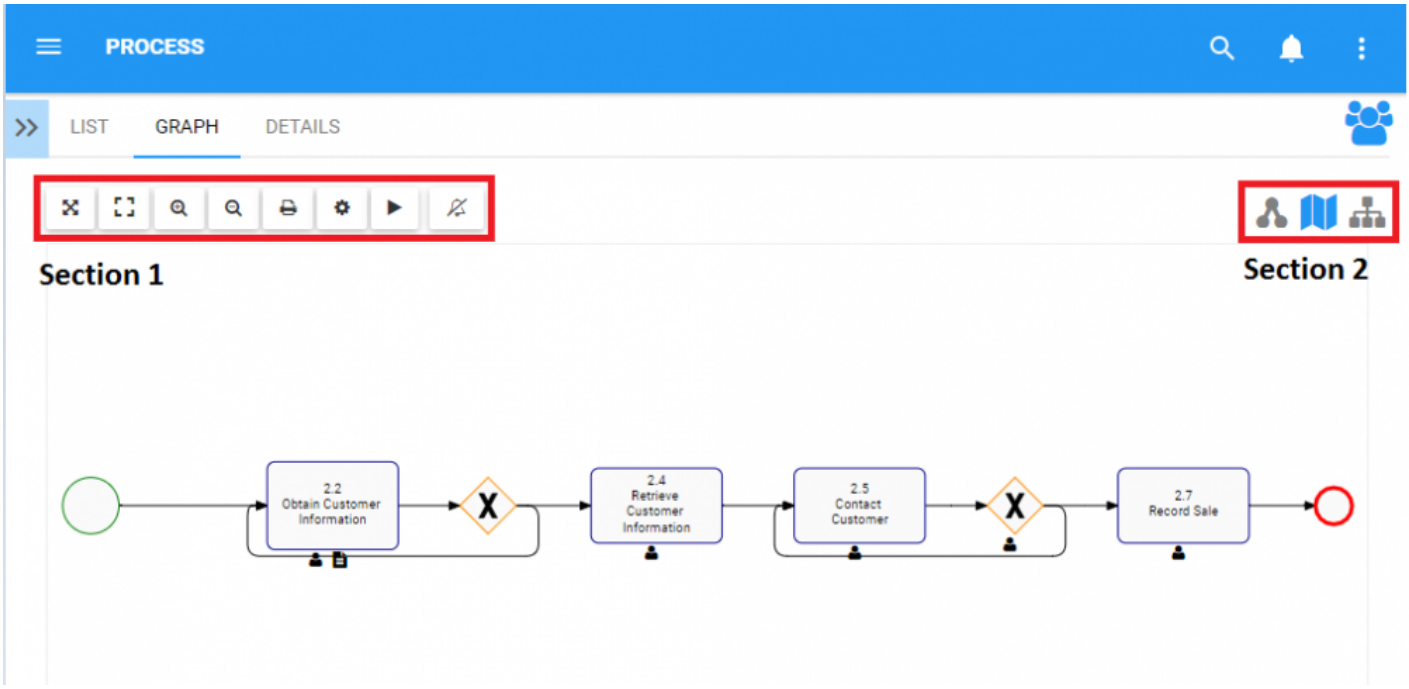
7. You will be navigated to the Graph section. By default, users will be sent to Map view in the default Graph view. An example of this view can be seen below



Default graph views can be changes by users and environment administrators. Please see Section 4.4.3.1.1.5 for further details.

4.4.3.1.1 Navigating in Graphs

Navigation within the graph section is primary controlled by the toolbar at the top of the page. The toolbar is divided into 2 sections.



Section 1 items are focussed on user viewing and graph functionality. Please see the table below for a full list and description of each item.

Item	Icon	Description
Fit Screen		This button will center the selected process on the users screen
Full Screen		This button will enlarge the process and fit a large-scale view to the users screen
Zoom In		This button will allow a user to zoom in to better view a process or item
Zoom Out		This button will allow a user to zoom out to better view a process or item
Options		This button will allow a user to modify the settings associated with their Graphs

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Auto Layout		This button will re-organize the process being viewed to a computer generated layout
Print		This button will allow a user to print the process being viewed
Subscribe		This button will allow a user to subscribe to the process being viewed. The icon will be displayed in white when a user is **not subscribed** to an item The icon will be displayed in blue when a user **is subscribed** to an item

Section 2 items are focussed on Graph selection. Please see the table below for a full list and description of each item.

Item	Icon	Description
Impact Graph		Graph showing downstream representation of associated items
Map Graph		Traditional BPMN viewing Graph, featuring traditional Graph View, Swimlane and Matrix Swimlane options
Hierarchy Graph		Graph showing a top-down view of processes and how they fit within organizations

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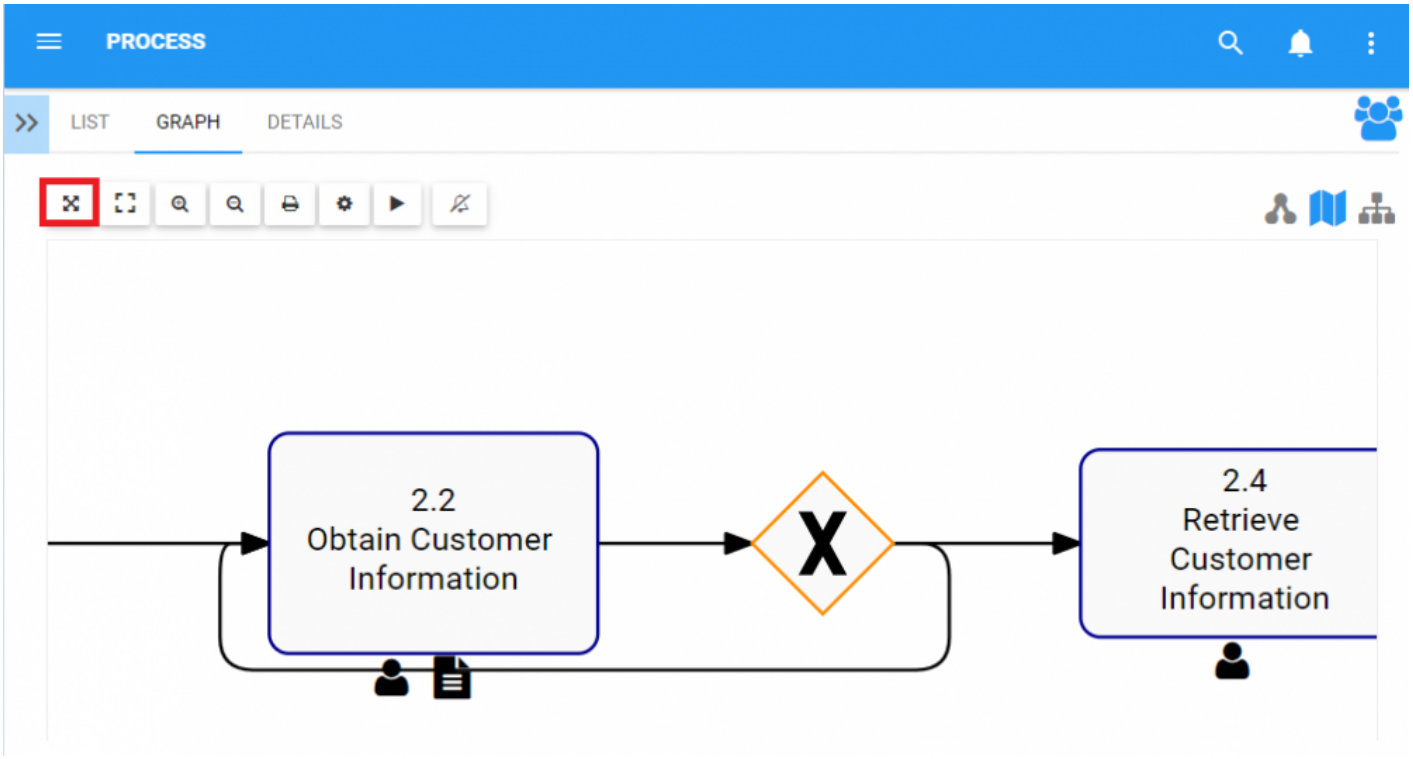
4.4.3.1.1.1 Fit Screen

The fit screen function has been implemented to assist users replacing and re-centering processes.

To use the fit screen button, please see the following instructions.

1. Select Fit Screen button at top left-hand corner of screen



2. Click on button and the page will reset.

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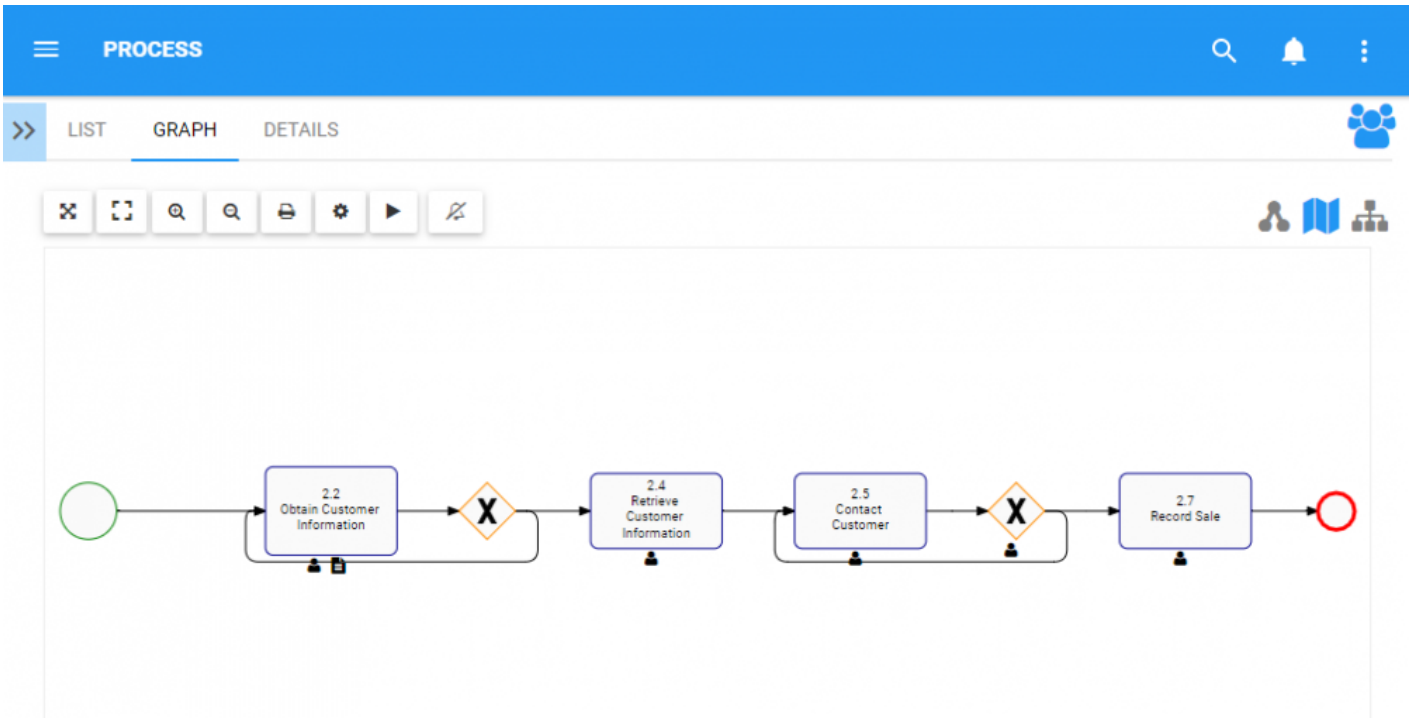

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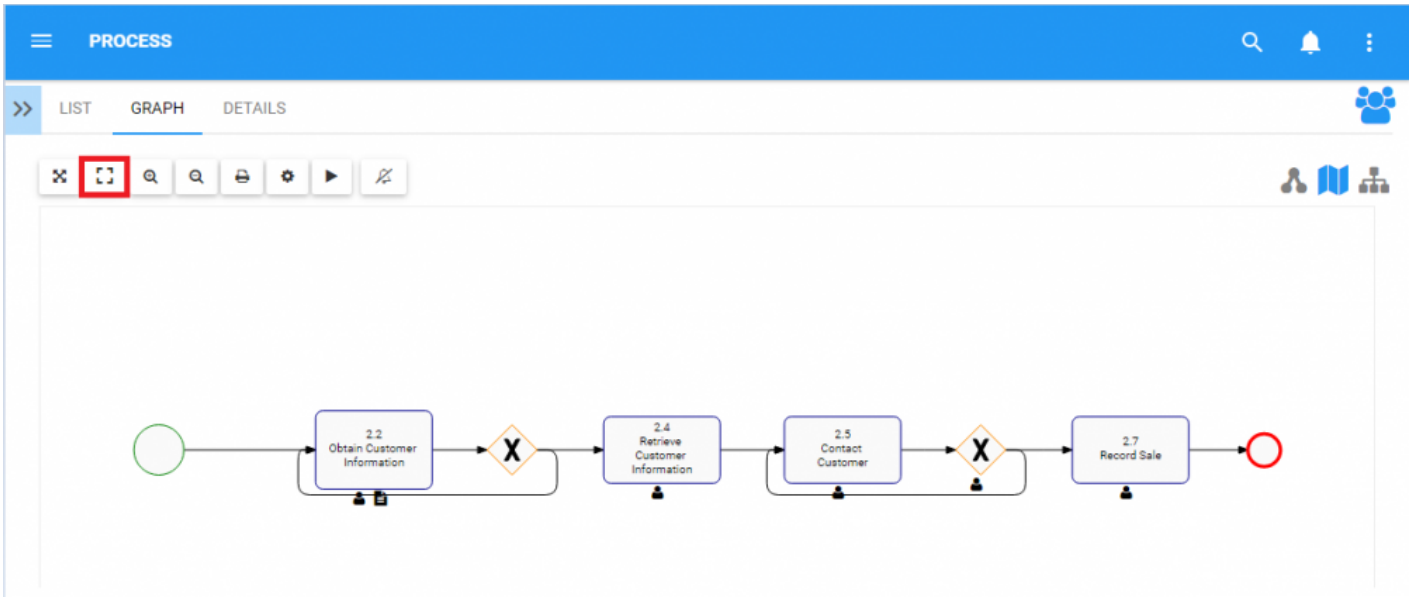
4.4.3.1.1.2 Full Screen

The full screen function has been implemented to assist users at viewing processes, utilizing the full screen of a user.

To use the Full Screen button, please see the following instructions.

1. Select the full-screen button at the top-left hand corner of the screen



2. The process will enlarge itself to provide a full screen view as is shown

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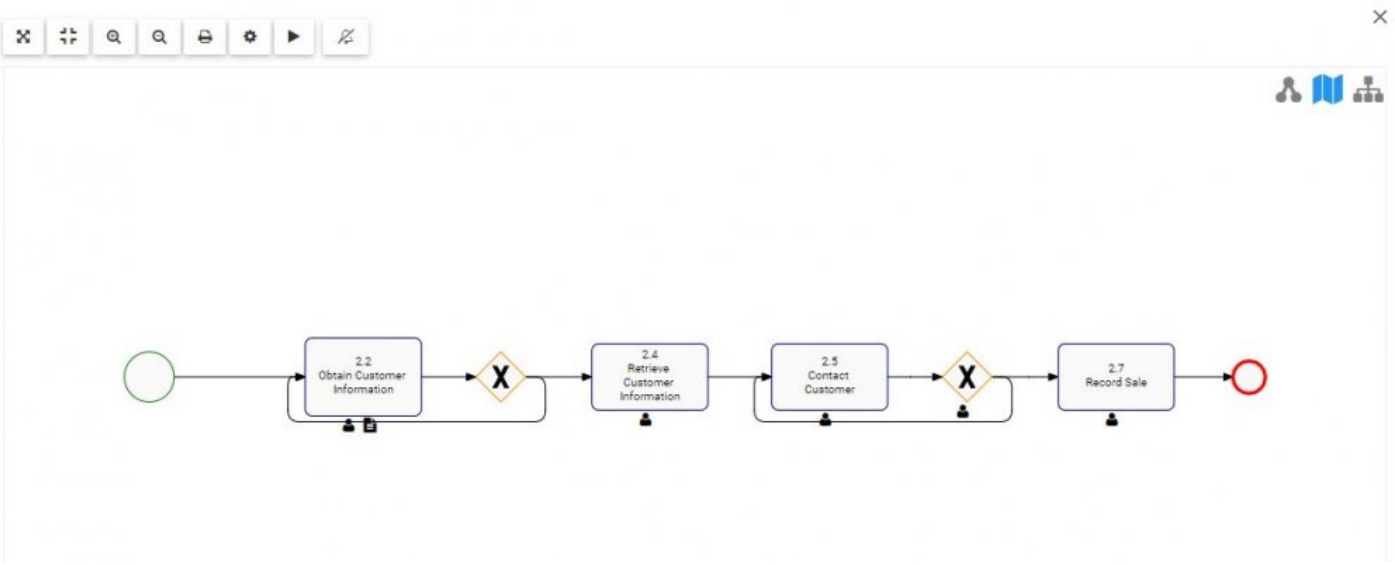
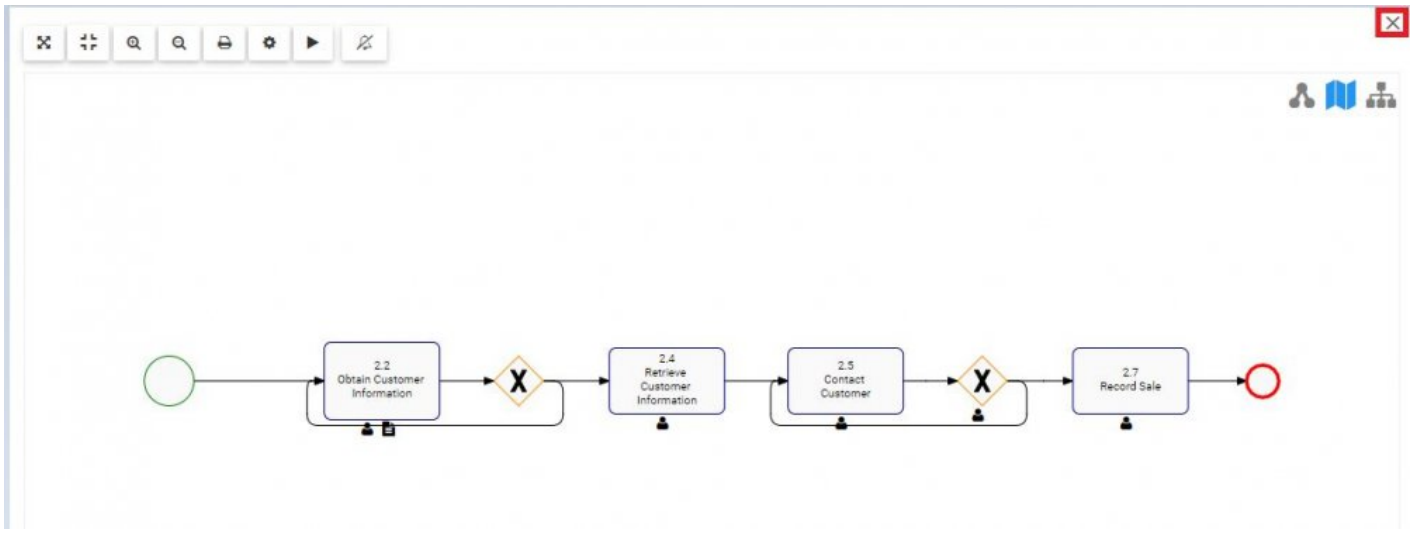


3. To exit full-screen, click on the × at the top-right corner

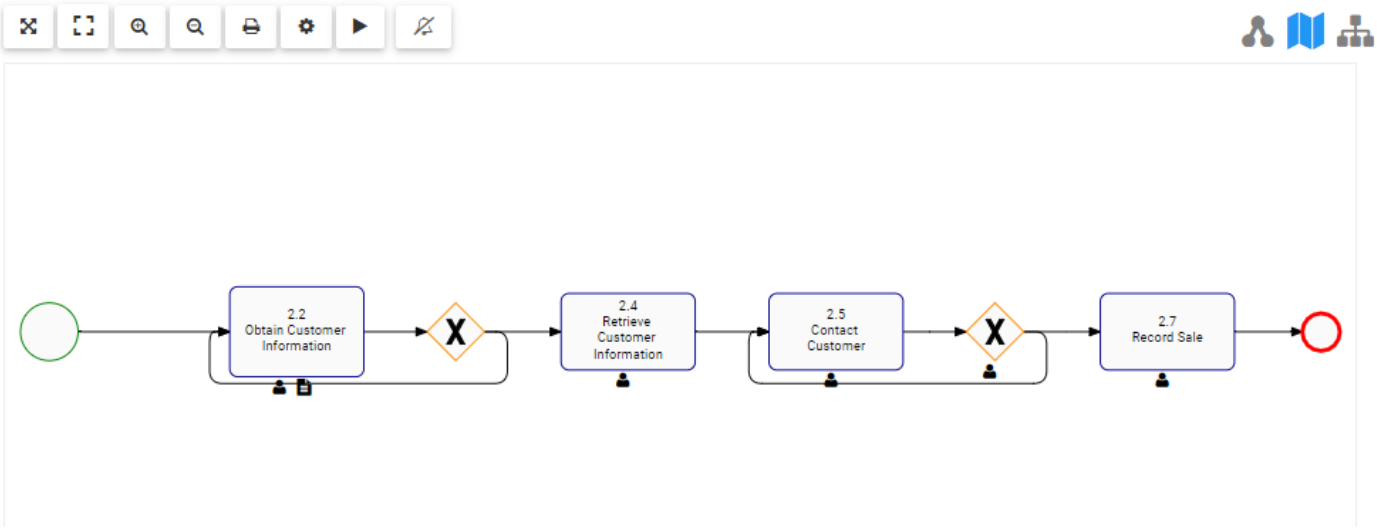


4.4.3.1.1.3 Zoom In

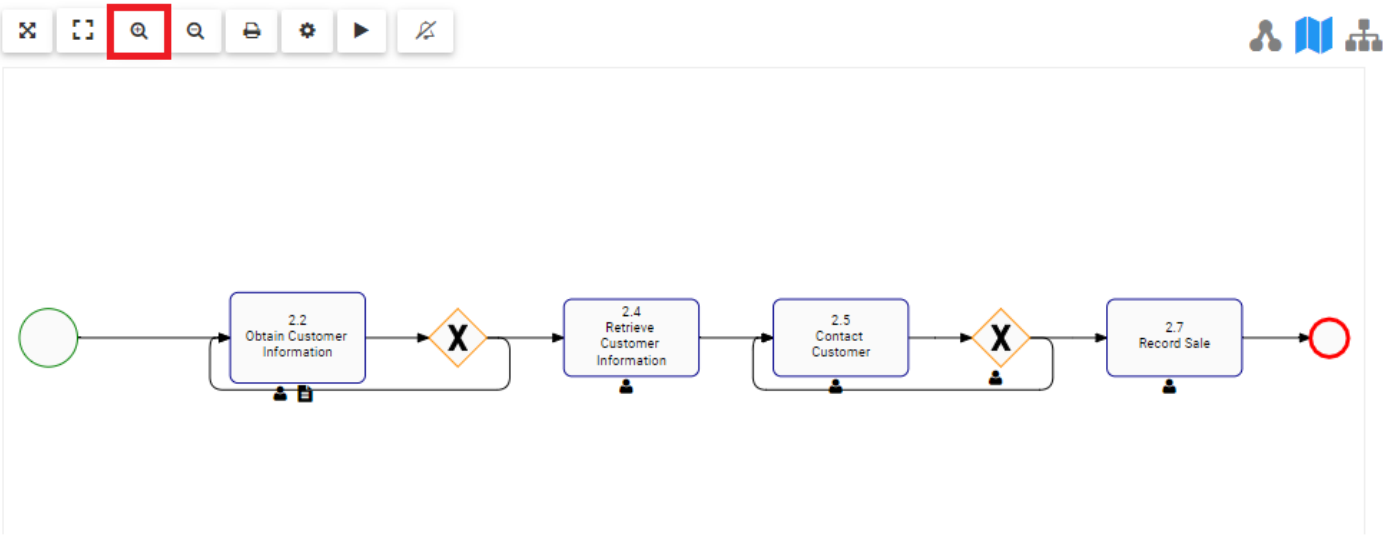
The zoom function has been implemented to assist users in viewing specific items within selected processes

To use the Zoom In button, please see the following instructions.

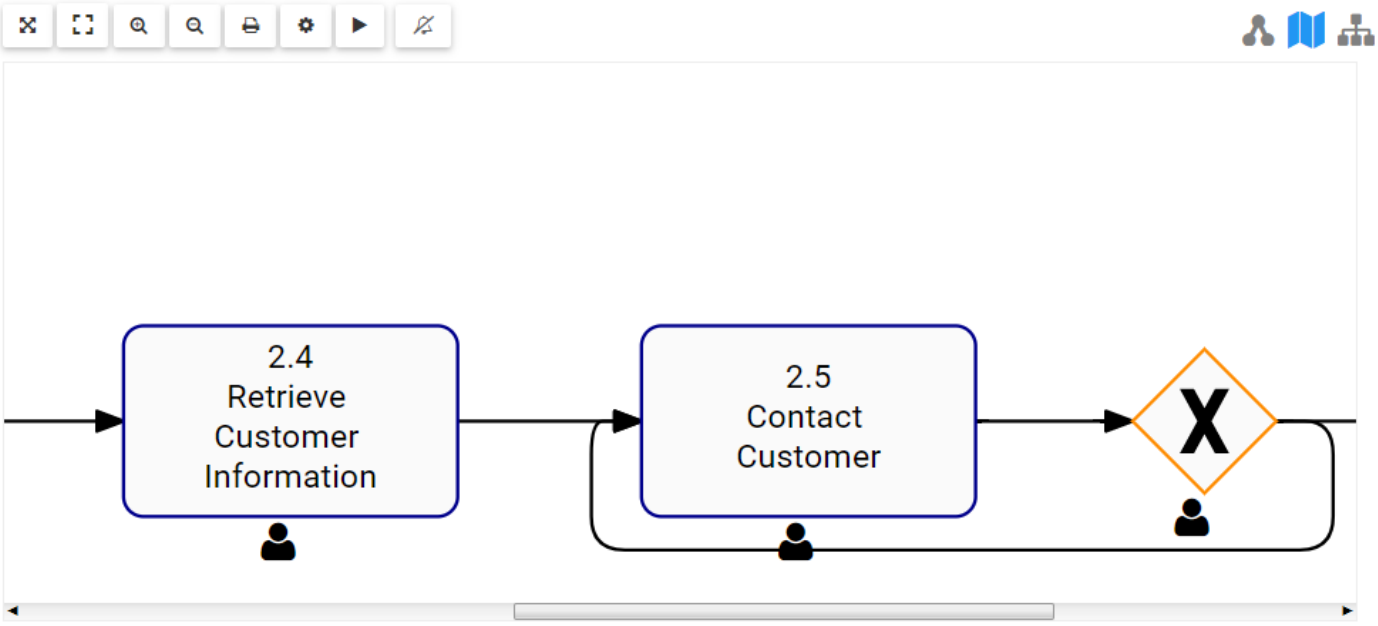
1. Navigate to the Graph tab



2. Select Zoom In button at the upper left corner of the page



3. Click button until reaching desired Zoom



Users can also use their mouse wheel to zoom in and out

Mobile: Users can zoom in or out on mobile devices with the use of 2 fingers.
Zooming In: Place two fingers on the screen and drag them in opposite directions until desired zoom is reached.

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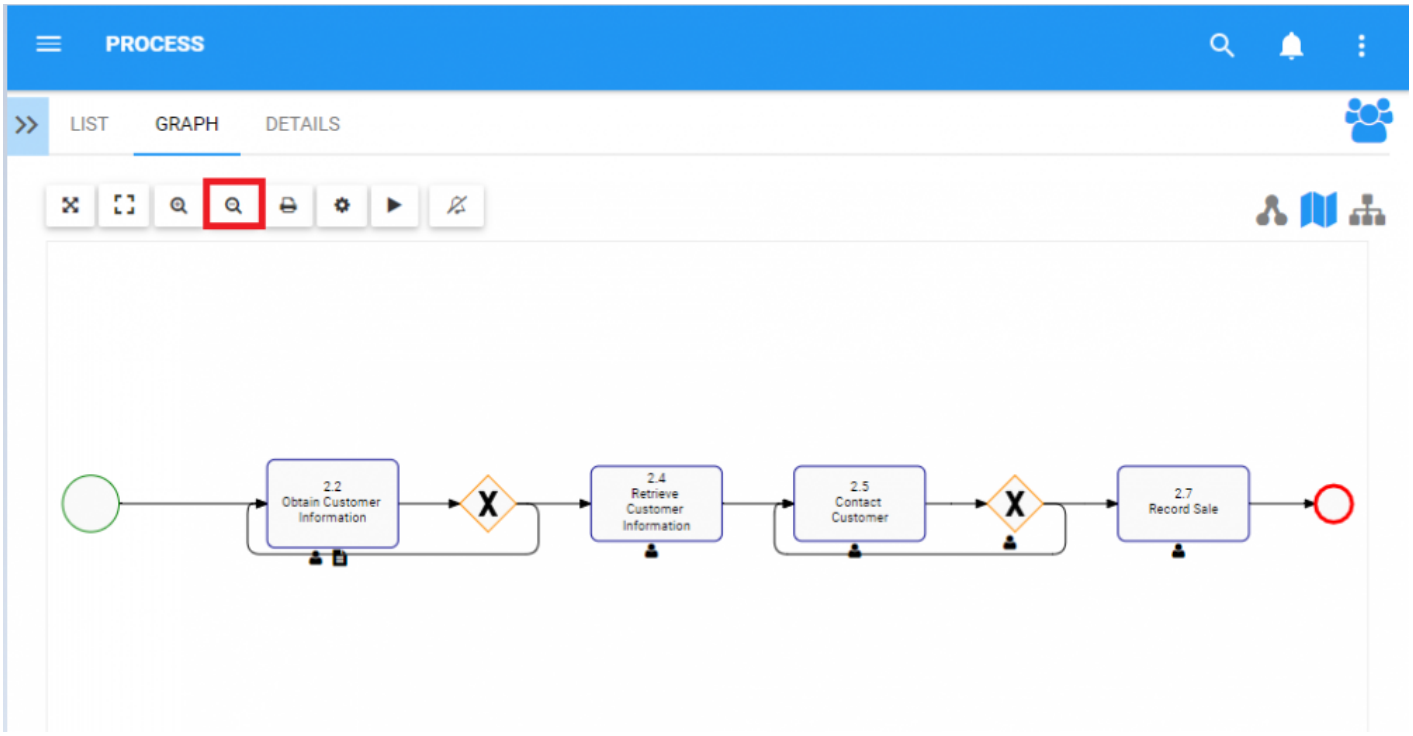
4.4.3.1.1.4 Zoom Out

The zoom function has been implemented to assist users in viewing specific items within selected processes

To use the Zoom Out button, please see the following instructions

1. Select Zoom Out button at the upper left corner of the page



2. Click button until reaching desired Zoom

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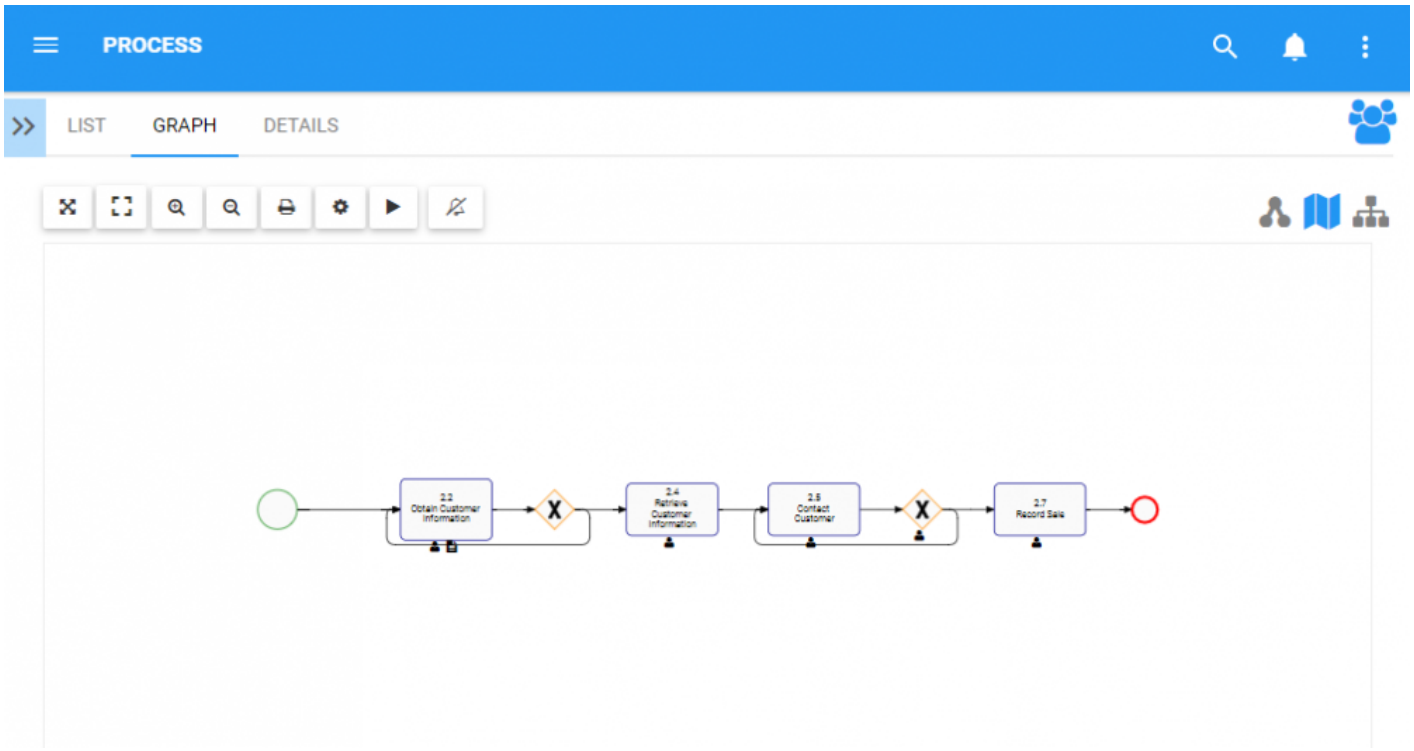

Users can also use their mouse wheel to zoom in and out

Mobile: Users can zoom in or out on mobile devices with the use of 2 fingers.
Zooming Out: Place two fingers on the screen and drag them towards one another until desired zoom is reached.

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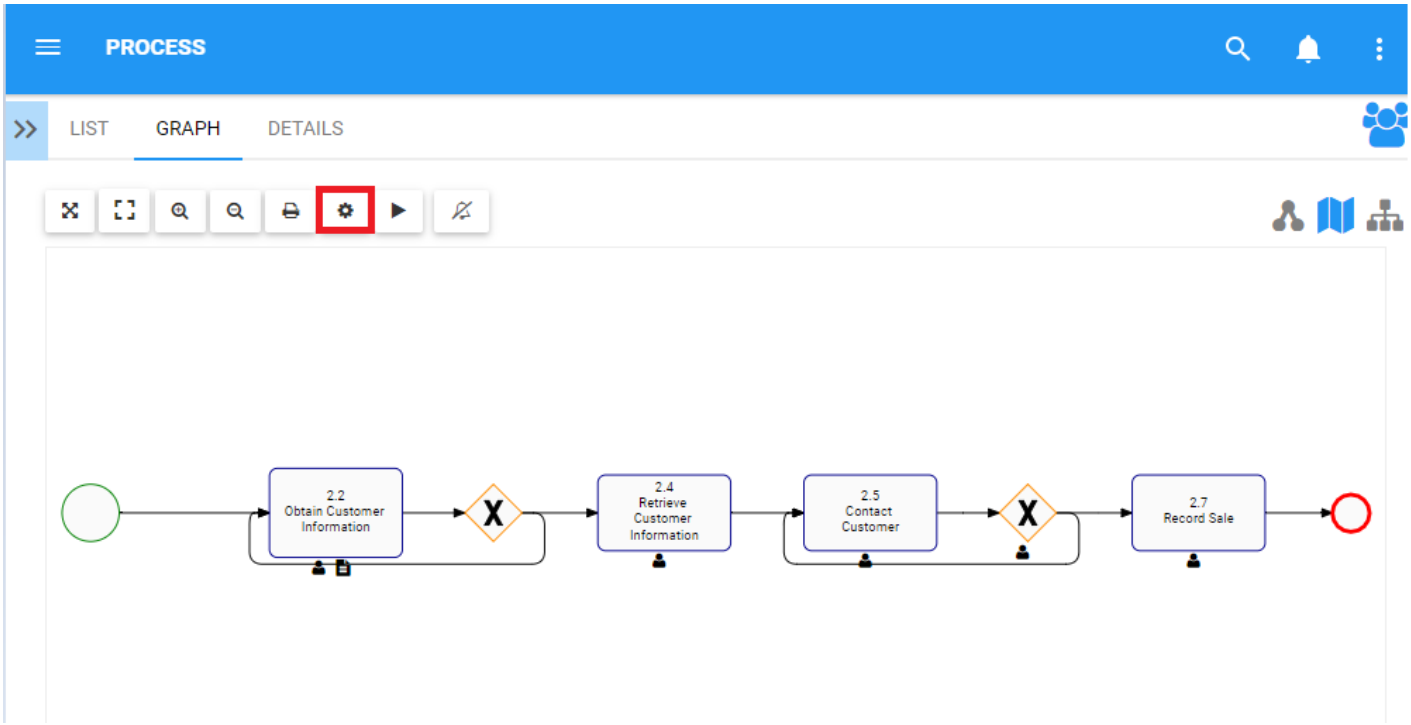
4.4.3.1.1.5 Options

The Options button has been added to allow users to customize the Graphs they view. Customization allows users to select exactly what is displayed in each graph, allowing them to prioritize key information in a format of their choice.

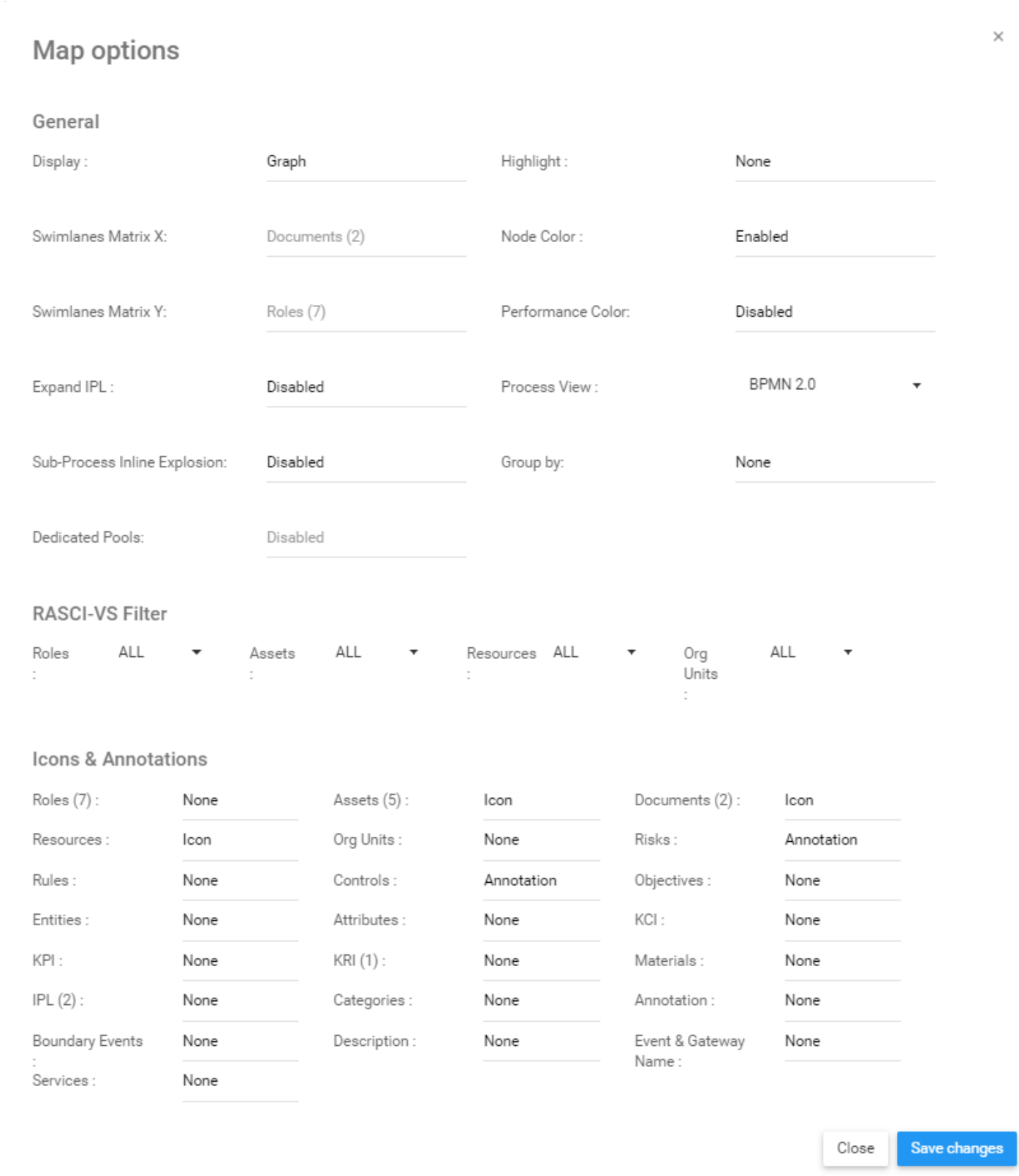
This section will cover navigation to the options button. Further details on Graph customization can be found in the Graph Customization section below.

To use the Options button, please see the following instructions

1. Select the Options button at the upper left corner of the page



2. The Options panel will be displayed on the screen as shown



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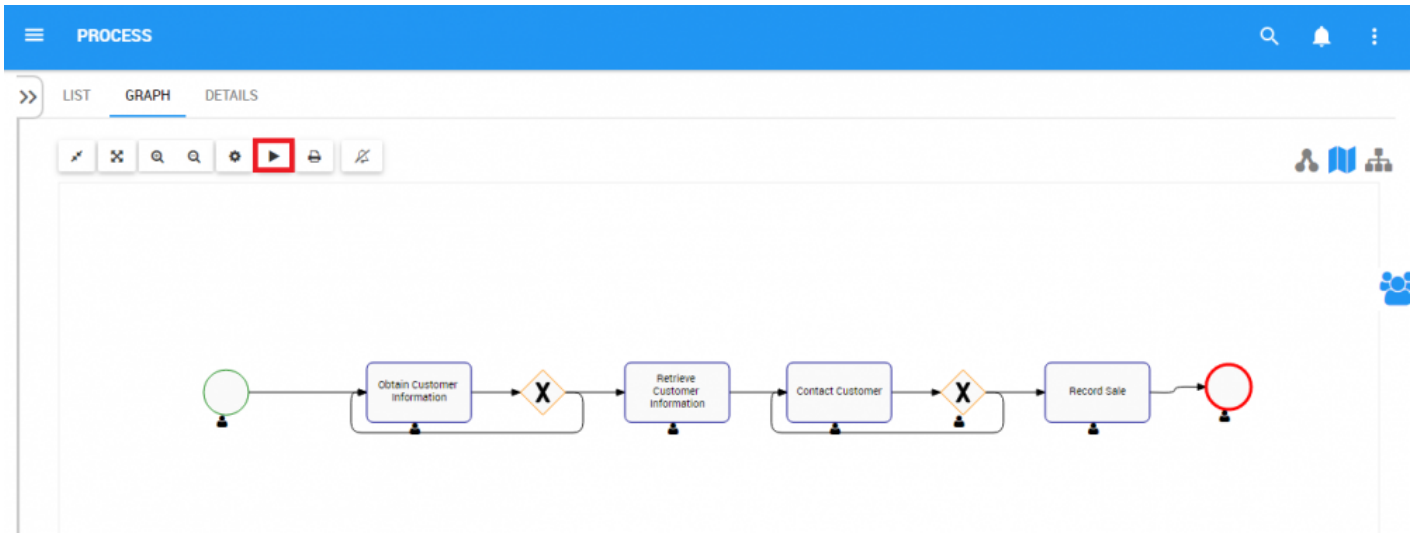
4.4.3.1.1.6 Auto Layout

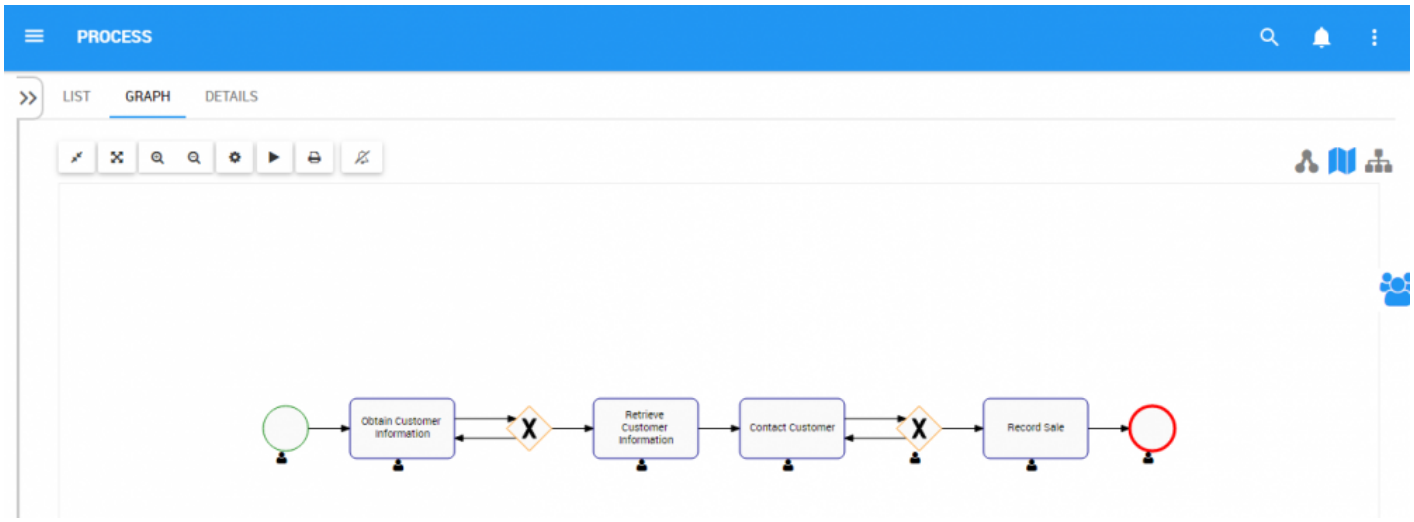
The Auto Layout function has been added to optimize process layout after user editing. To reduce the time consuming process of arranging different items and tasks, the Auto Layout button uses a routing algorithm inbuilt within the EPC to generate a user friendly layout at the click of a button.

To use the **Auto Layout button**, please see the following instructions.

1. Select Auto Layout button at the upper left corner of the page



2. Layout will be reset



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This layout change is a temporary change done to optimize the view of the current graph. These changes are not permanent but are saved by a user locally.

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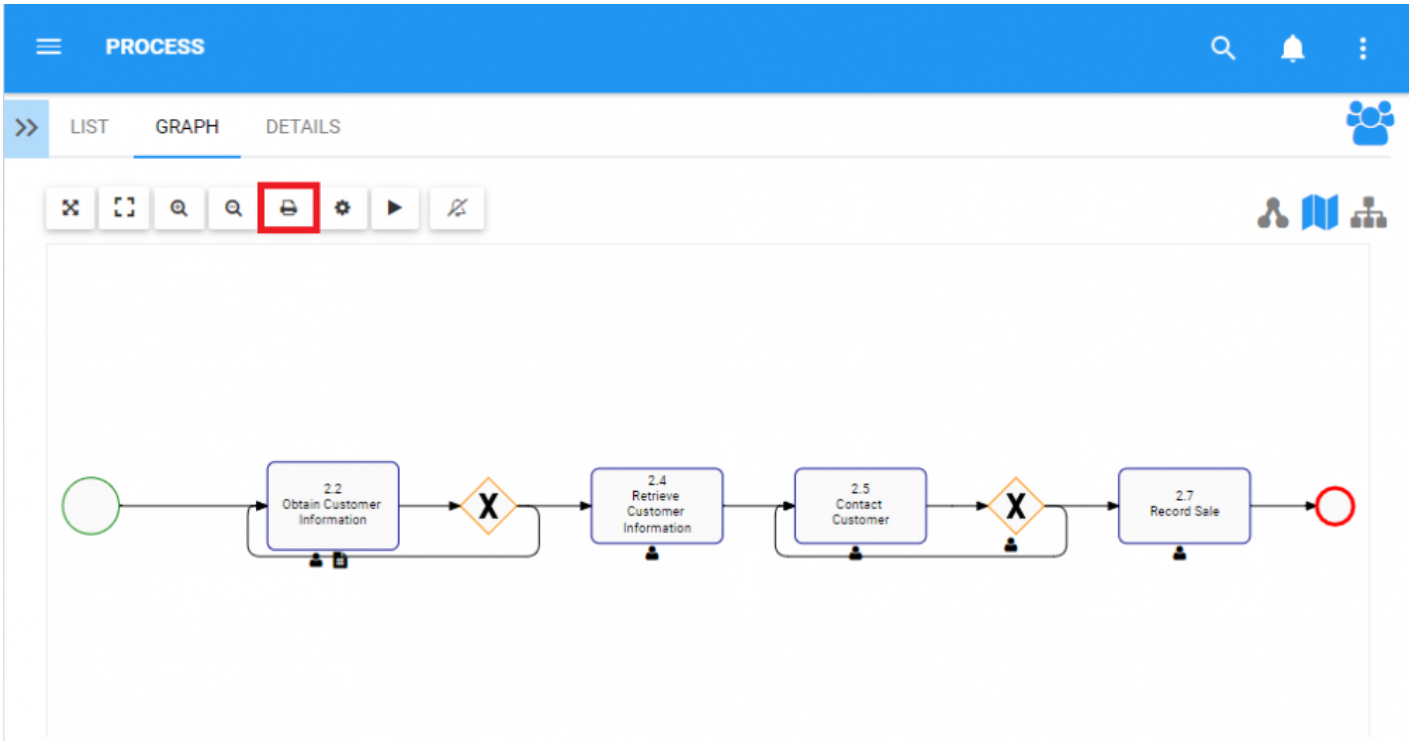
4.4.3.1.1.7 Print

The Print button has been added to allow users to easily print a desired graph.

To use the Print button, please see the following instructions.

1. Select Print button at the upper left corner of the page



2. A print settings panel will be displayed on the user's screen

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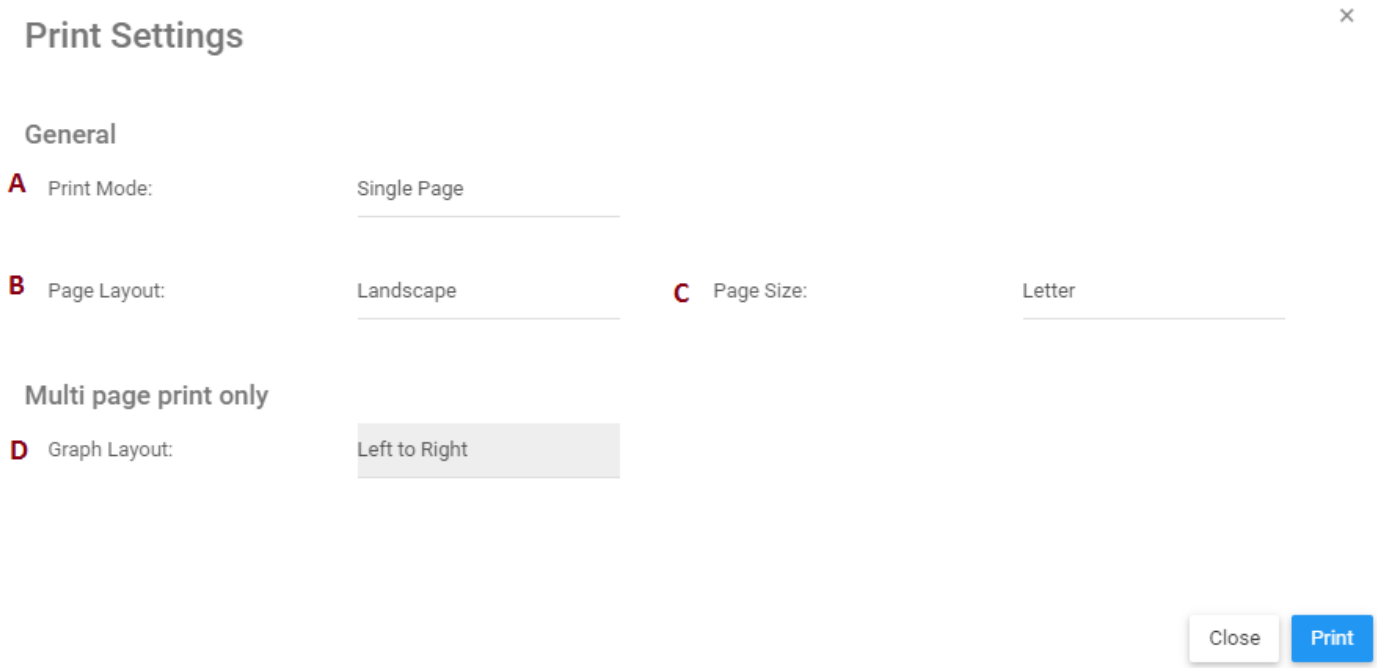

	Setting	Options	Description
A	Print Mode	a. Single Page b. Multi Page	Fit the displayed content over a single page Spread the displayed content over multiple pages
B	Print Layout	a. Landscape b. Portrait	Landscape (“Sideways”) page orientation Portrait (“Top-Down”) page orientation
C	Page Size	a. Letter b. Legal c. A3 d. A4	8.5 × 11.0 in 8.5 × 14.0 in 11.7 × 16.54 in 8.3 × 11.7 in
D	Graph Layout	a. Left to Right b. Top to Bottom	Sideways layout of graphic being printed (multipage) Top-down layout of graphic being printed (multipage)

3. Select desired print settings options and click the print button at the bottom right corner of the window

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4.4.3.1.1.7.1 Printing from Internet Explorer

Internet Explorer sets default margins, headers and footers, all of which take up extra space on EPC prints. Consequentially, this can result in:

- Map overlaps onto EPC footers
- Truncated maps
- Empty pages

To ensure an optimal print of process maps from Internet Explorer, users must first bypass their browser's Page Setup settings.

How to optimize Internet Explorer Print Settings (IE 9, 10 & 11)

1. From Internet Explorer, navigate to File > Page Setup

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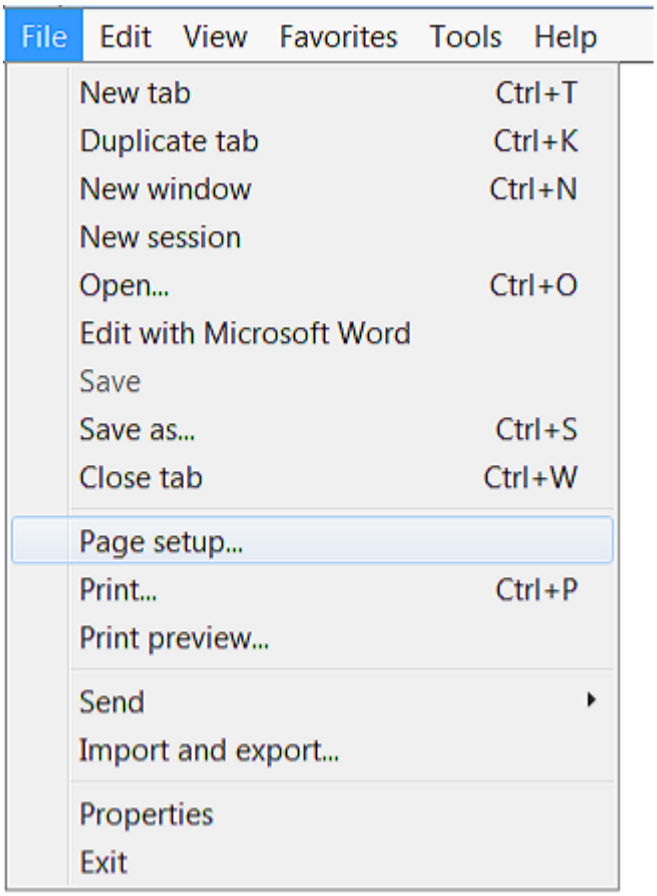

- Alternatively, navigate to the settings button > Print > Page Setup

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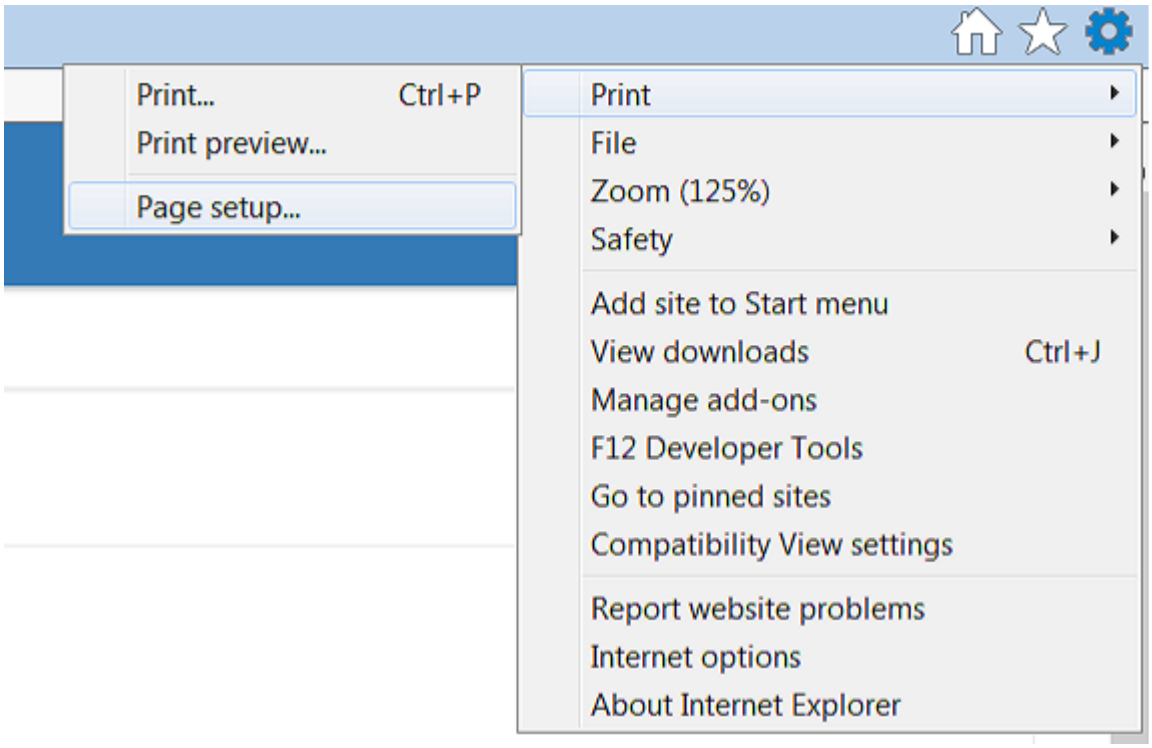

2. Once in the Page Setup Box:

1. Set all margins to 0. If Page Setup is reopened subsequently, it is possible that the values in those fields have changed. That is normal: Internet Explorer is simply setting the lowest possible margins.
2. Select your preferred print layout. Internet Explorer does not adjust its print layout according to the selection made within the EPC print section. Therefore, any print layout selected within the EPC must also be manually applied to Internet Explorer.
3. Disable Shrink-to-fit.
4. Set all headers and footers to Empty. If required, the EPC's print options include a header/footer setting that is compliant with ISO 9001.
5. Click OK

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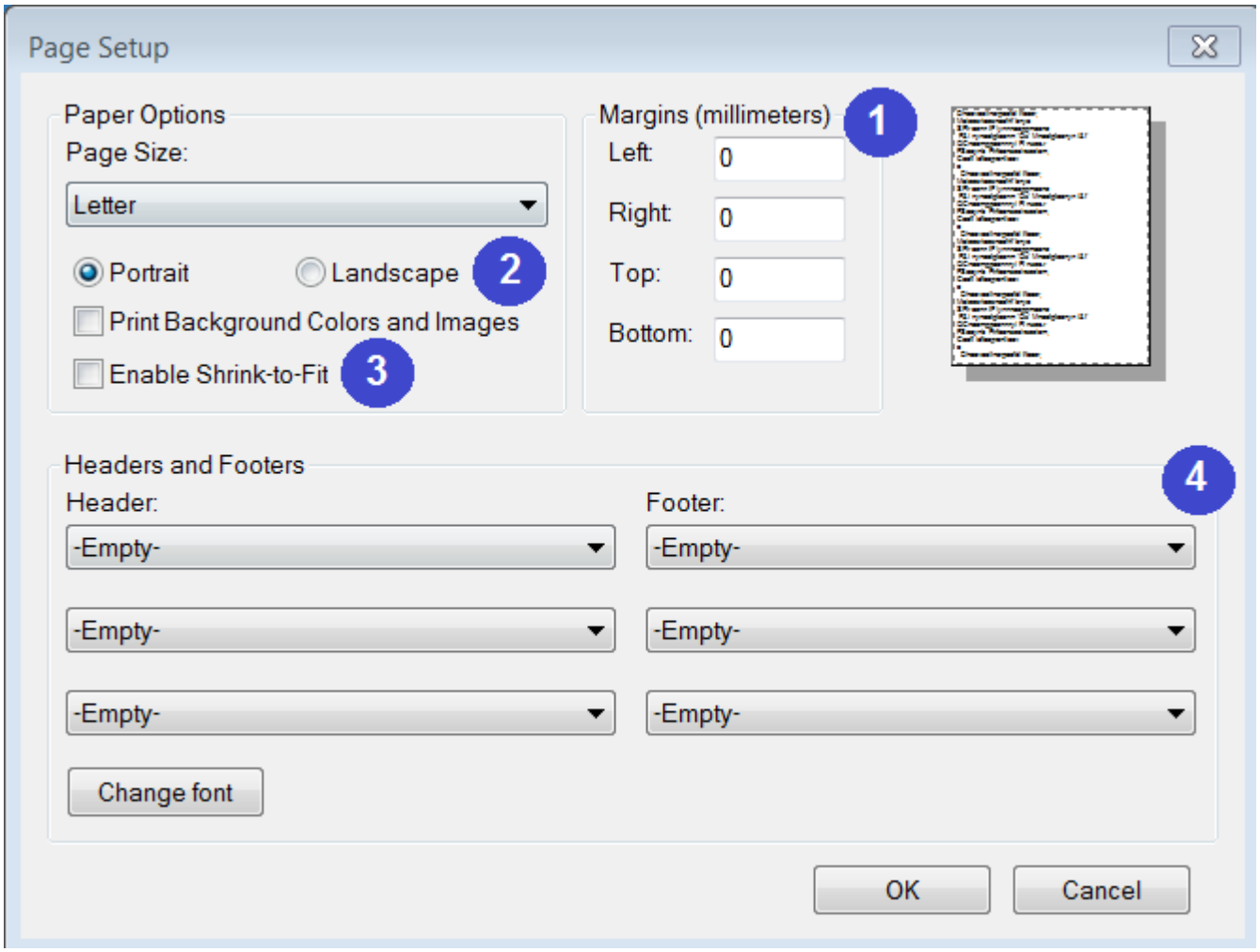

Conversely, the default Internet Explorer Page Setup settings or the designated printer's settings can also be changed by your system administrator.

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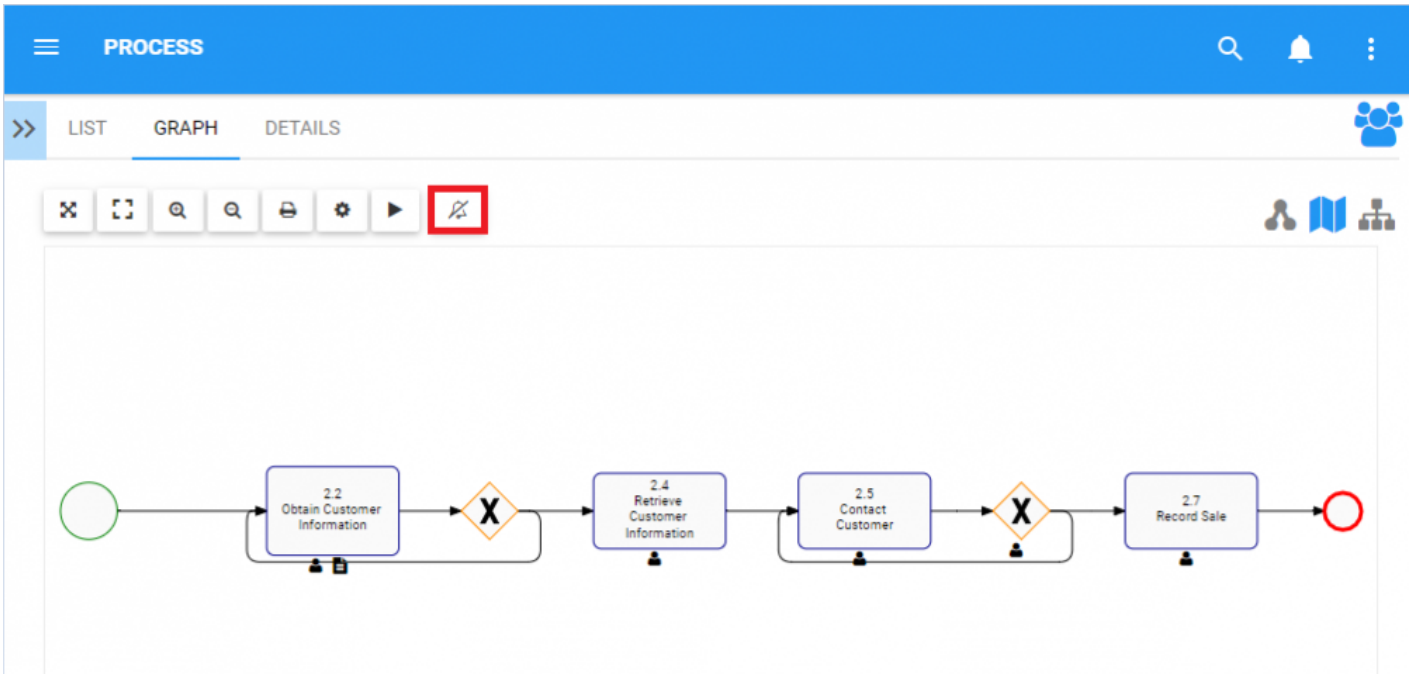
4.4.3.1.1.8 Subscribe

The subscribe function, symbolized by the icon, has been added to allow users to track items, objects and processes in the EPC. Users can subscribe to specific items or processes to simplify and centralize monitoring activities. By subscribing to items, users will receive notifications when items or processes are altered or optimized. Additionally, item subscriptions is a useful filter and option for Home page Widgets, allowing users to create Widgets specifically featuring items they deem as critical to their individual jobs.

The subscribe button can be found on all item pages, in both Graph and Details sections.

To use the Subscribe button, please see the following instructions.

1. Select Subscribe button at the upper left corner of the page



2. The button will change color to , symbolizing that a user is now subscribed to the item displayed on the screen.

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4.4.3.2 Map Graph

A Map graph represents the typical pictorial view of a business process. It is the most common process viewing format, displaying the process in typical BPMN format. This process view allows users to view business processes, associated activities and items. The EPC provides the following Map view formats:

1. **Traditional Map Graph View**
2. **Swimlanes**
3. **Matrix Swimlanes**

The EPC allows users to customize these graphs with the “Options” section denoted by . The customizations allow users to select those items, and how these items are displayed on the Graphs.

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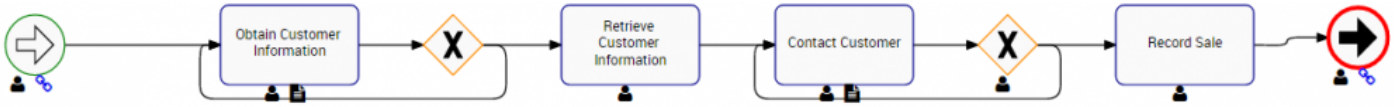
4.4.3.2.1 Graph View

Graph view allows users to view processes following the traditional flow-chart format. This provides users with a high-level view of a business process, outlining key activities and the key items associated with each task.



Exactly what is displayed and how they can be edited is discussed in the Options section.

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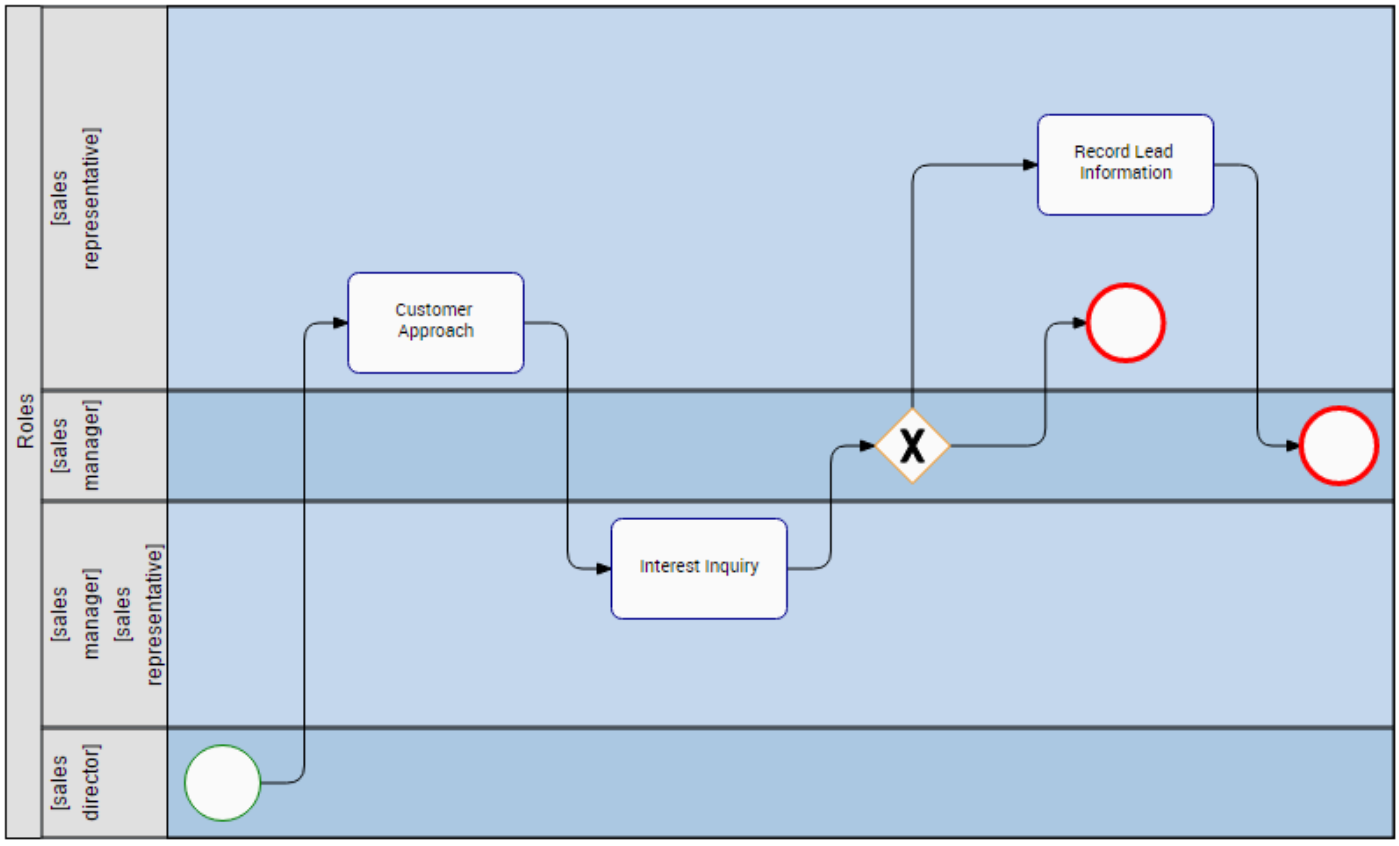
4.4.3.2.2 Swimlanes

The Swimlane view displays an expanded view of your entire process, dividing the flow of work into separate Swimlanes determined by the organization unit, resource or role that is responsible for the flow object. This allows users to view the process that is organized by the specific object type.



Users can set the axis that defines the Swimlane. The traditional view, as seen above, allows users to organize the process based on Roles, highlighting the key staff involved in the process.

The following Items can be set on the axis:

a. Roles
b. Assets
c. Documents
d. Resources
e. Org Units
f. Risks

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g. Rules
h. Controls
i. Objectives
j. Entities
k. Attributes
l. KPIs
m. KCIs
n. KRIs
o. Materials
p. Categories
q. Boundaries Events
r. Events & Gateway Names

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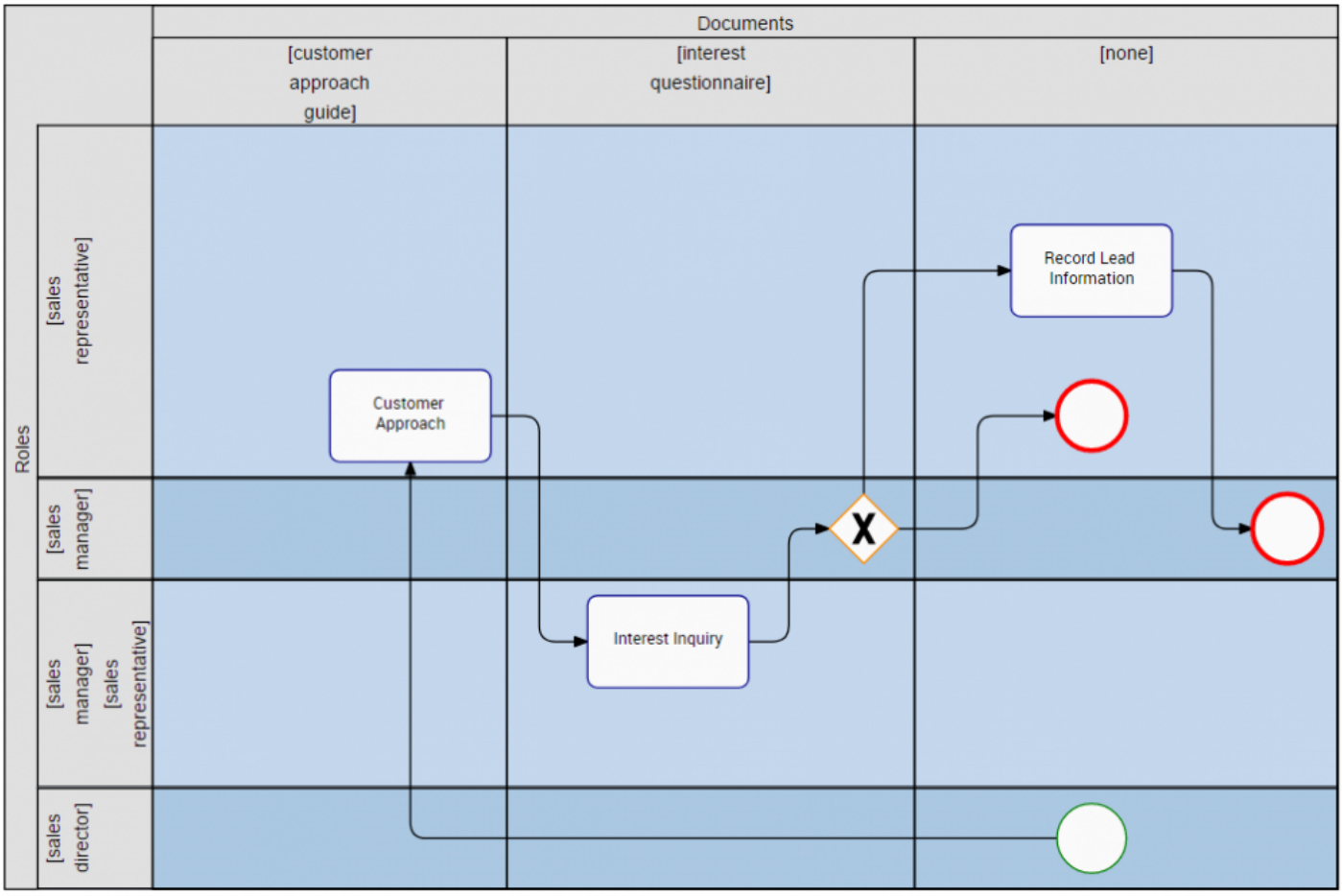
4.4.3.2.3 Matrix Swimlanes

The Matrix Swimlane view displays an expanded view of your entire process, dividing the flow of work into a Matrix of Swimlanes where you can define the division parameter of the two axes. Using Matrix Swimlanes allows users to analyze processes based on various dimensions. This view allows you to see various ways in which the process is divided and how different associated objects or details are inter-connected within the process.



The following Items can be set on the axes:

a. Roles
b. Assets
c. Documents
d. Resources
e. Org Units

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f. Risks
g. Rules
h. Controls
i. Objectives
j. Entities
k. Attributes
l. KPIs
m. KCIs
n. KRIs
o. Materials
p. Categories
q. Boundaries Events
r. Events & Gateway Names

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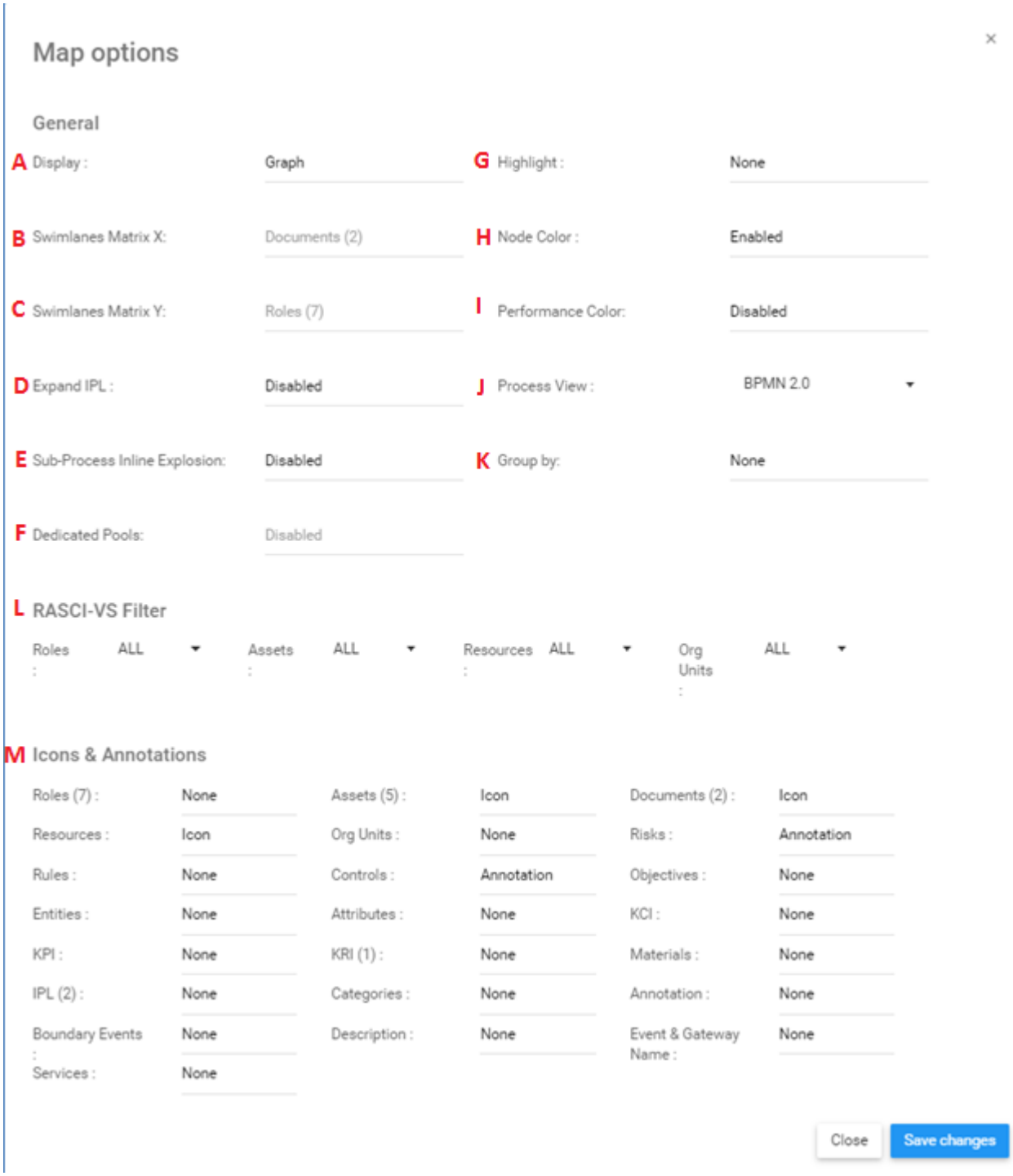
4.4.3.2.4 Graph Customization

Users can customize Map Graphs to display specific items, allowing users to better view and analyze business processes. There are a variety of customizable features, which can be located in the options section denoted by icon.

Customization Options



A. **Display:** The Display feature allows users to toggle between Graph, Swimlane and Matrix Swimlane views.

Item	Setting	Purpose

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A	Display	Allows users to toggle between Graph formats (Graph View, Swimlanes, Matrix Swimlanes)
B	Swimlanes Matrix X	Select item to be feature on Swimlane X-axis (Matrix Swimlane only)
C	Swimlanes Matrix Y	Select item to be feature on Swimlane Y-axis
D	Expand IPL	Allow user to automatically enable IPLs expansion
E	Sub-Process Inline Explosion	Allows users to enable sub-processes expansion within a current process map
F	Dedicated Pool	Allows users to isolate specific roles, resources, assets and org units into separate swimlanes
G	Highlight	Allow user to highlight specific paths (Critical Path, High Risk Path, Value Added)
H	Node Color	Allow users to enable or disable pre-set node colors
I	Performance Color	Allow users to enable or disable pre-set performance colors
J	Process View	Allow users to toggle between process viewing formats (BPMN 2.0, Simple BPMN, VSM)
K	Group By	This section allows users to classify process and flow items into categories (e.g. Core Process vs. Support Process)
L	RASCI-VS Filter	Allow users to prioritize items being displayed using the RASCI-VS matrix
M	Icons & Annotations	Allow users to dictate which items are displayed and how they are displayed (Icon, Annotation, None)

To use the Display option, please see the steps below:

1. Select “Options” icon

2. Navigate cursor to Display bar

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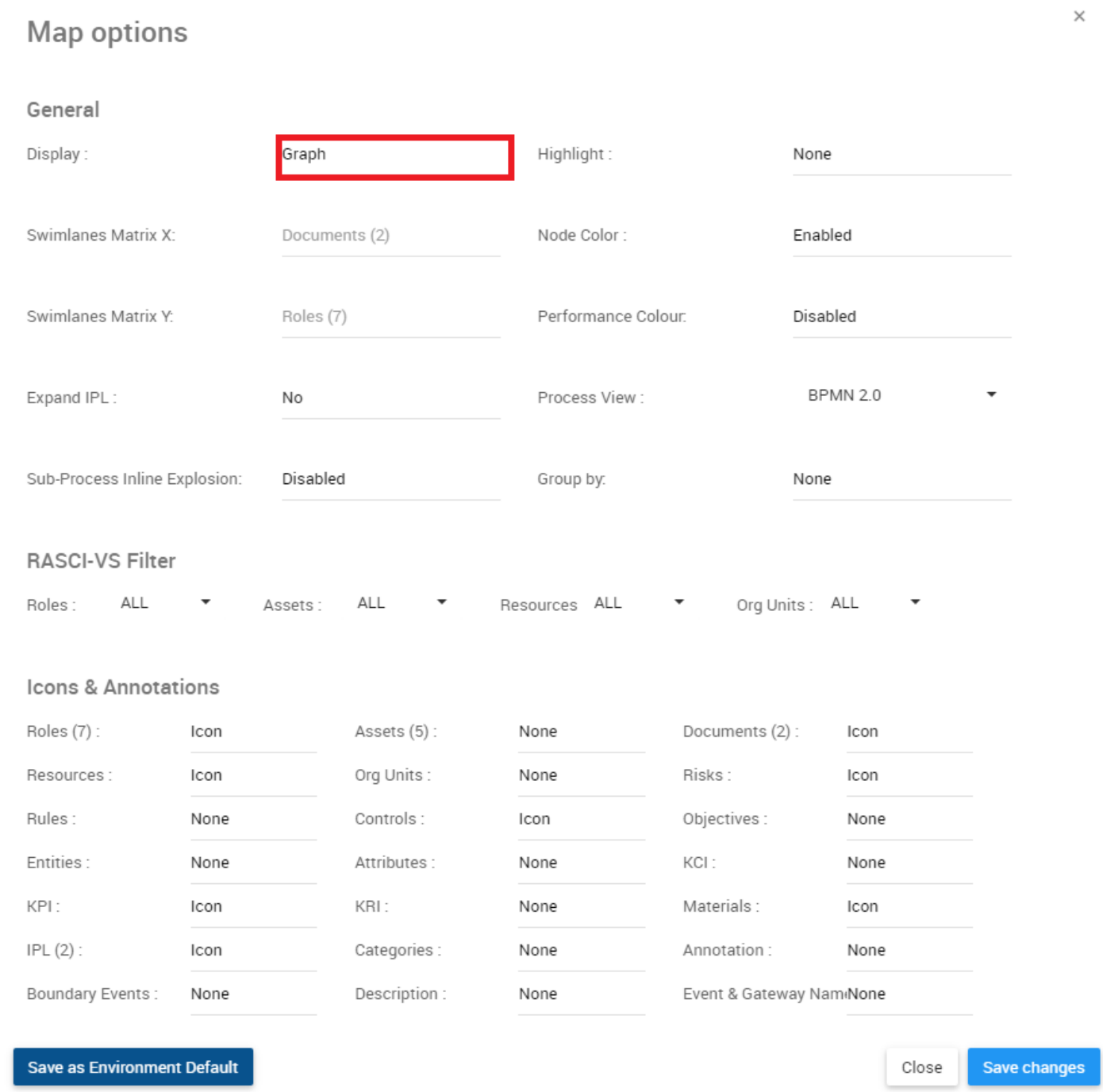
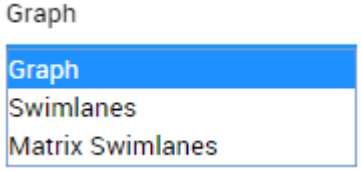


3. The following drop-down menu will be generated



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4. Select desired Graph format

5. Select the “Save Changes” button at the bottom right of the page

B. **Swimlanes Matrix X:** This feature allows users to set the X-axis for Matrix Swimlane Graphs.

This feature will be locked until the Matrix Swimlane Display has been selected

To use the Swimlanes Matrix X option, please see the steps below:

1. Select “Options” icon

2. Navigate cursor to Display bar

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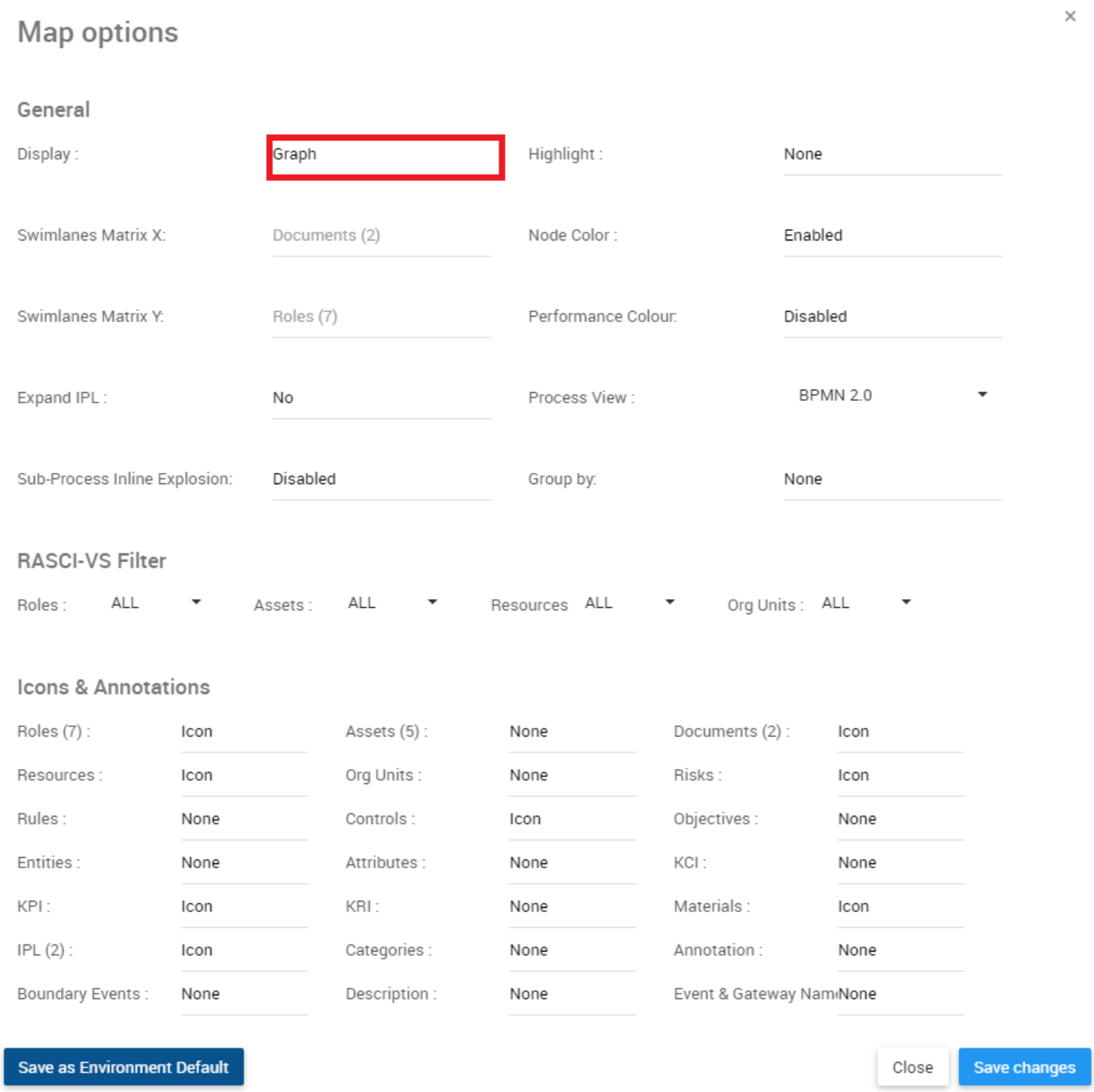
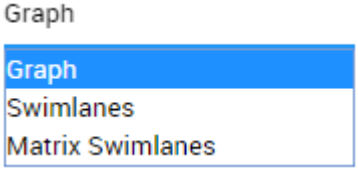


3. The following drop-down menu will be generated



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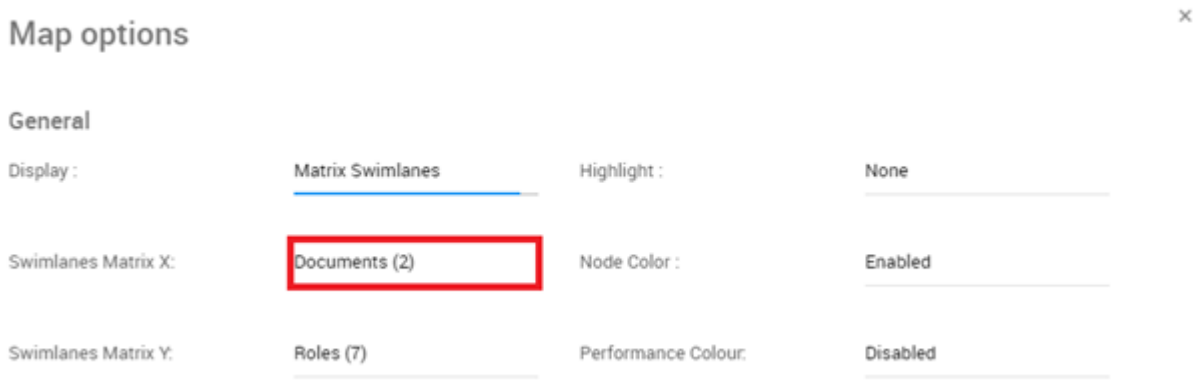
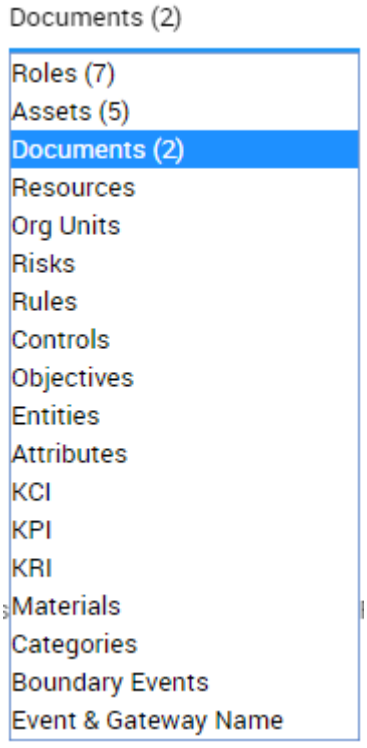
4. Select Matrix Swimlanes

5. Navigate and select Swimlanes Matrix X bar



6. The following drop-down menu will be generated



7. Select the desired item to be featured on the X-Axis

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> All items that are featured within a process are marked by a set of brackets (#) with a number. The number corresponds to how many of each item is featured within the process.

> For optimized Matrix Swimlane view, users should not select the same item for both axes (Swimlanes Matrix X, Swimlanes Matrix Y)

8. Select the “Save Changes” button at the bottom right of the page.

C. **Swimlanes Matrix Y:** This feature allows users to set the Y-axis for Swimlane and Matrix Swimlane Graphs.

> This feature will be locked until the Swimlane or Matrix Swimlane Display has been selected

To use the Swimlanes Matrix X option, please see the steps below:

1. Select “Options” icon

2. Navigate cursor to Display bar

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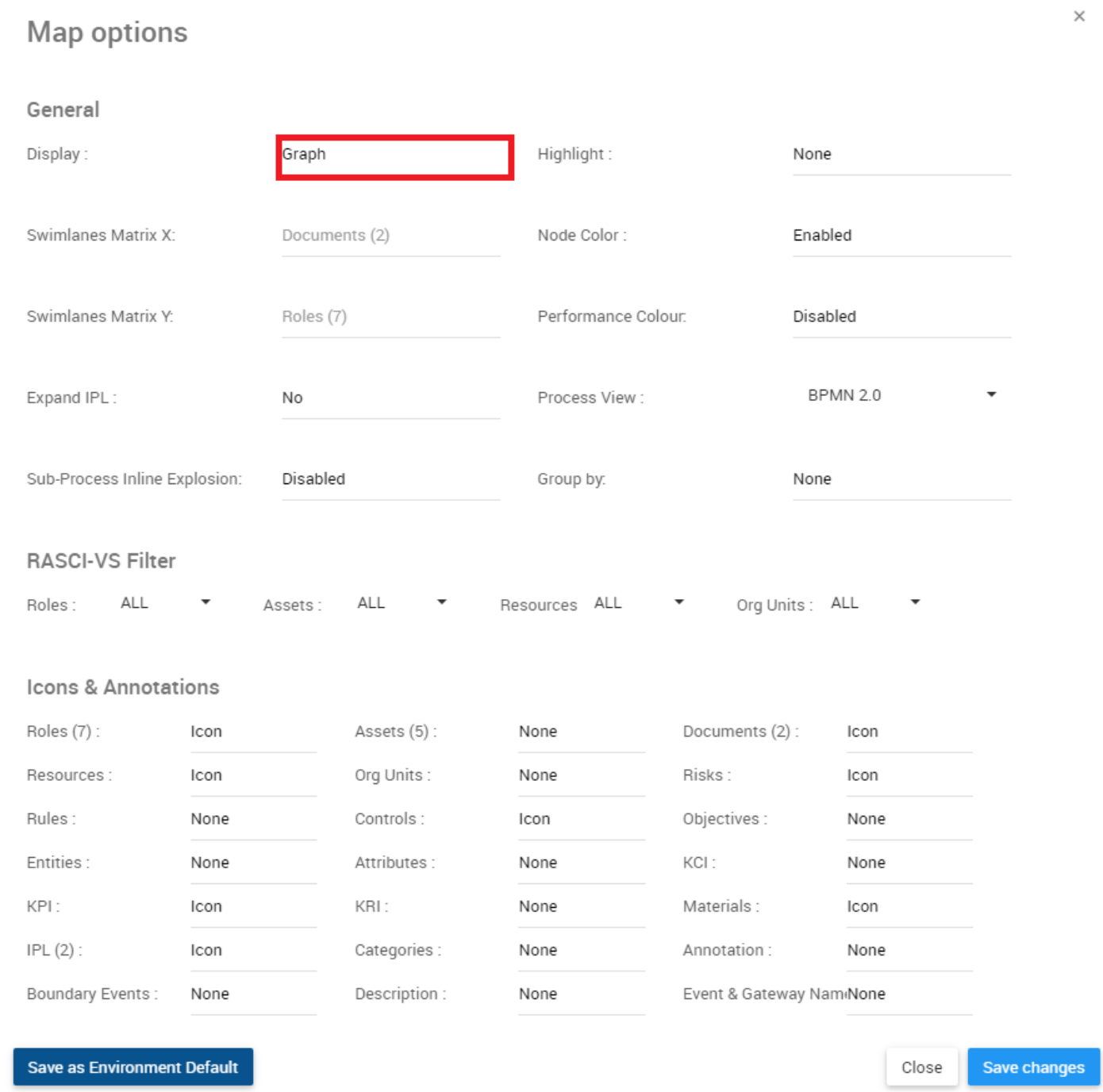
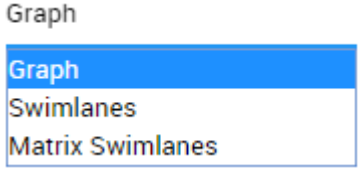


3. The following drop-down menu will be generated



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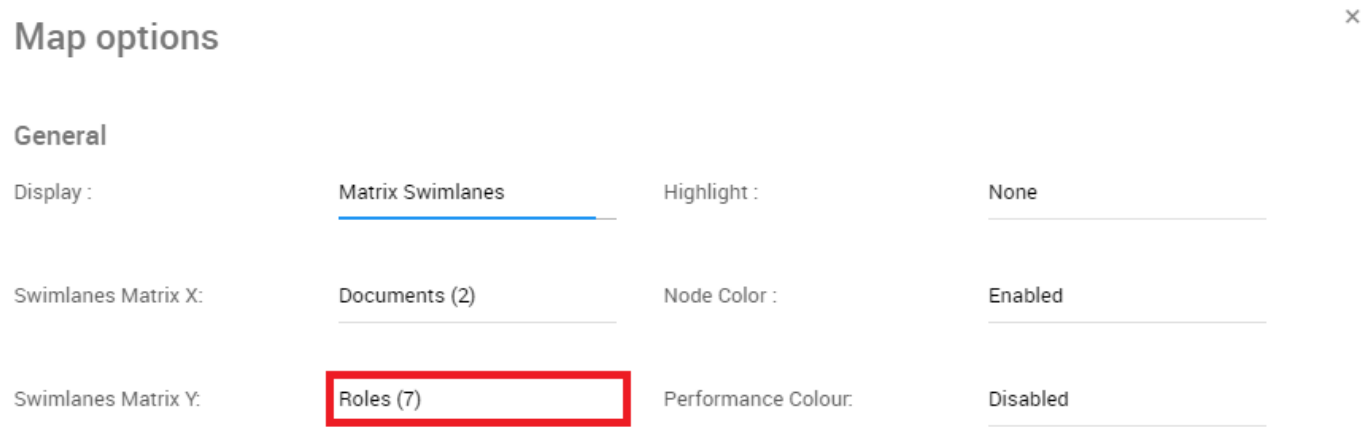
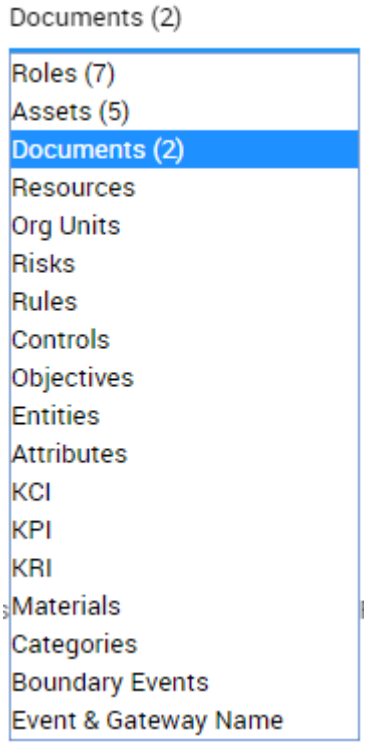
4. Select Swimlanes or Matrix Swimlanes

5. Navigate and select Swimlanes Matrix Y bar



6. The following drop-down menu will be generated



7. Select the desired item for the Y-axis

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> All items that are featured within a process are marked by a set of brackets (#) with a number. The number corresponds to how many of each item is featured within the process.

> For optimized Matrix Swimlane view, users should not select the same item for both axes (Swimlanes Matrix X, Swimlanes Matrix Y)

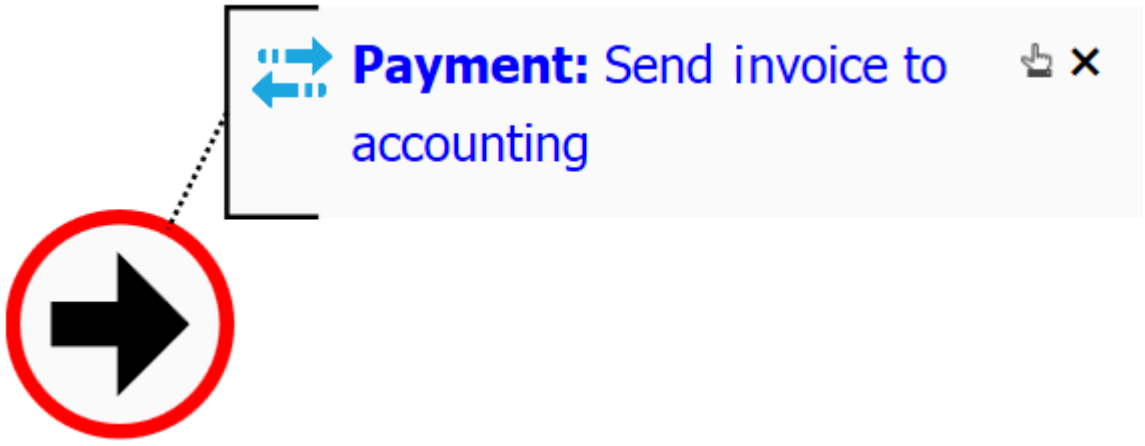
8. Select the “Save Changes” button at the bottom right of the page.

D. **Expand IPL:** This function allows users to expand Inter-Process Links to view the full implication of a given process.

If enabled (YES), Expand IPL will not redirect you to the linked process, but rather expand the graph to show the current process extending into the linked process.

If you have enabled the IPL **icon** in the graph settings, you will see a icon beneath the item having an IPL. Clicking on the IPL icon will convert it into the IPL annotation that is described below.

If you have enabled the IPL **annotation** in the graph settings or have clicked on the IPL icon, you will see an annotation as displayed below containing the process name in bold followed by the name of the task that the IPL will lead to. In this example, the linked process is named “Payment” and the linked task is named “Send invoice to accounting”. Therefore, the annotation reads “**Payment:** Send invoice to accounting”.



How to Expand IPL

1. Make sure that you have enabled **Expand IPL** in the graph settings.

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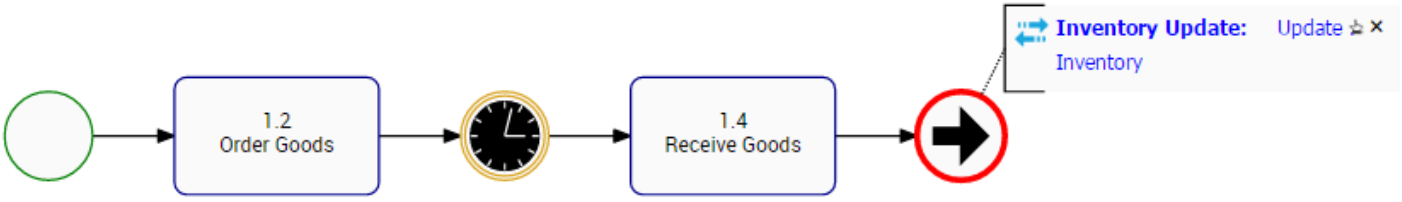
2. Make sure you are on a process that has an IPL to another process.

3. Make sure that you have enabled either the IPL icon or IPL annotation in the graph settings.

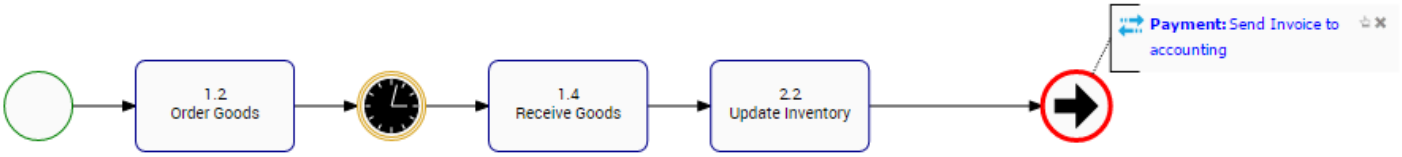
a. If IPL icon is enabled, click on the icon in order to display the IPL annotation.

4. Click on the blue text of the IPL annotation.



5. The process will now expand to incorporate all flow objects of the linked process.

a. You can continue expanding IPL's, click on the "**Payment:** Send Invoice to accounting" of the currently expanded process to expand it to the next linked process.



6. The process will now expand to incorporate all flow objects of the linked processes.

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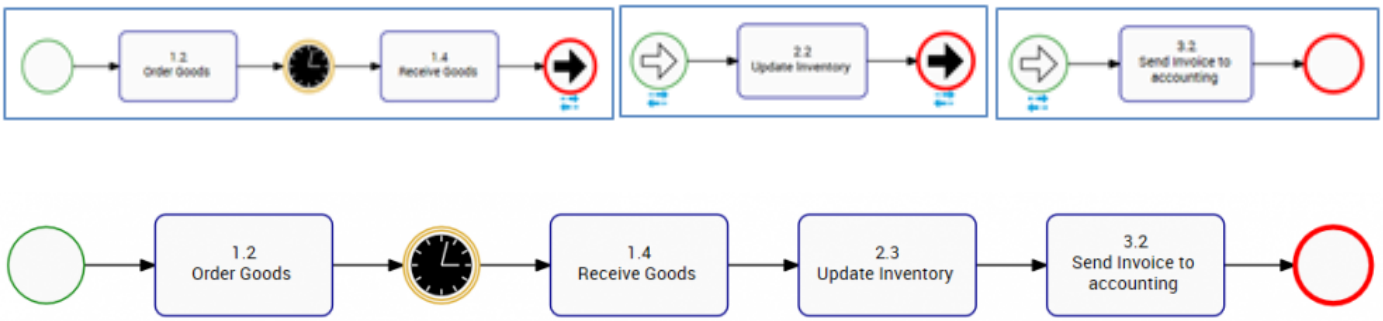
Below is an example of three (3) processes that are linked together via IPL.

Below are the three processes displayed in line, where no IPL has been expanded yet. Notice that they all have start and end events, and those that have IPL's are displaying the icon.



E. **Sub-Process and Reference Inline Explosion:** If enabled, this option will allow the user to click the + icon in the sub-process and reference shapes so that its process **within** the current process map will be displayed.

F. **Dedicated Pool:** Enabled by EPC Modelers, Dedicated Pools allow users to isolate specific Roles, Resources, Assets and Organizational Units into isolated Swimlanes.

G. **Highlight:** The highlight function allows you to highlight the Critical Path, the High Risk Path, or tasks that are Value Added.

Critical Path: The sequence of flow objects that determine the minimum length of time needed to complete the process. Flow objects on the Critical Path are manually determined and selected in the EPC Modeler.

High Risk Path: The sequence of flow objects that determine the path of highest risk throughout the process. Flow objects on the High Risk Path are manually determined and selected in the EPC Modeler.

Value Added: Flow objects that add value to the output of the process or organization. Flow objects that are Value Added are manually determined and selected in the EPC Modeler.

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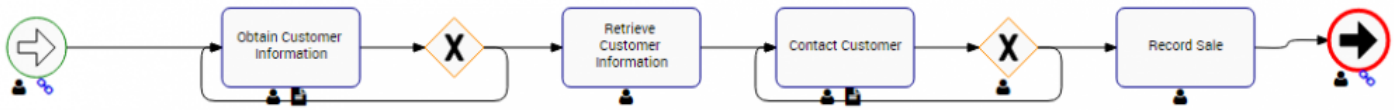
H. **Node Color:** If enabled, the colors that have been set on flow objects within the EPC Modeler will be displayed in the graph or swimlane.

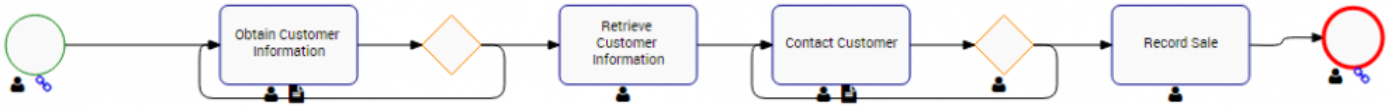
I. **Performance Color:** If enabled, flow objects will adopt the color (Green, Yellow, or Red) of the associated performance indicator (KPI, KRI, or KCI). If enabled, flow objects will adopt the color (Green, Yellow, or Red) of the associated performance indicator (KPI, KRI, or KCI). See the Performances section for detailed information about Performances and their colors. If multiple performance indicators are associated, the adopted color will be based on the weights assigned to them.

J. **Process View:** The process view allows users to toggle between different process annotations. This allows users to select the process notation they are most familiar with. Users can select the following notations

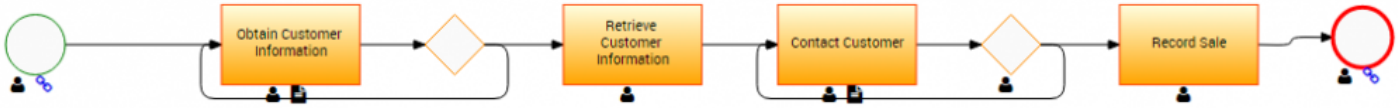
a. BPMN 2.0 (Business Process Modeling Notation)



b. Simple BPMN (Business Process Modeling Notation)



c. VSM (Value Stream Mapping)



To toggle between process notations, please see the steps below:

1. Select “Options” icon

2. Navigate cursor and select Process View option

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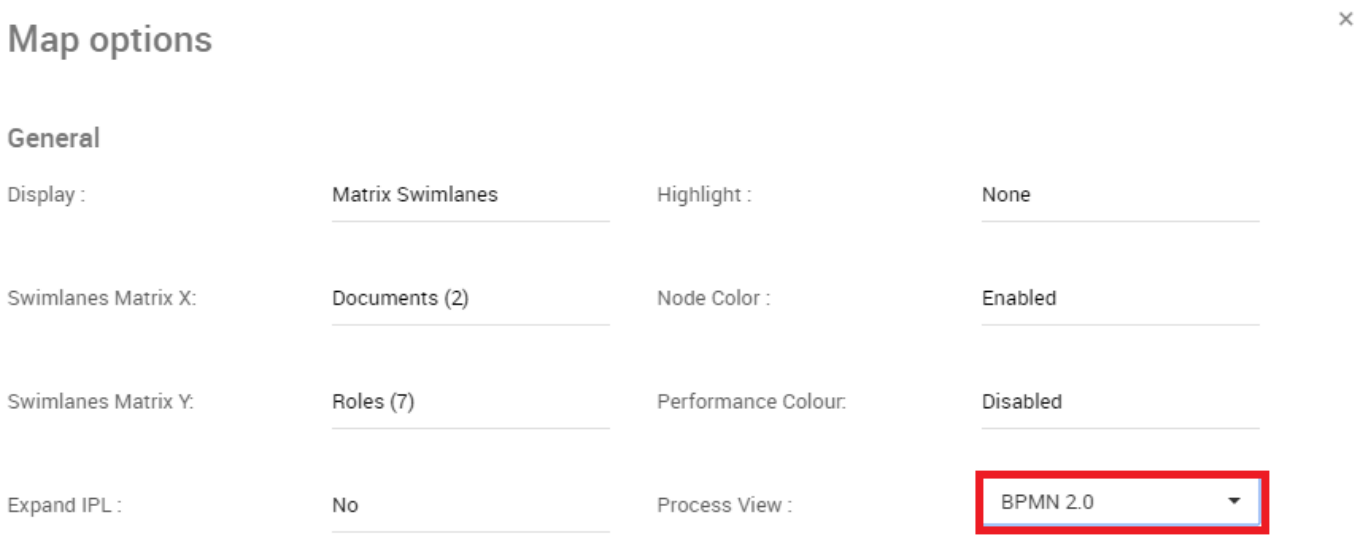

3. The following drop-down menu will be generated

4. Select desired process notation

5. Select the “Save Changes” button at the bottom right of the page

K. **Group By:** This section allows users to classify and group different items within process maps based on environment-defined categories. These categories, wholly set and defined by environments, can allow an organization to tailor their process maps to industry and business specific circumstances such as cover processes vs support processes.

L. **RASCI-VS Filter:** The RASCI-VS Filter allows users to filter which items get displayed on Graphs based on their level of involvement. Using the RASCI-VS allows users to filter through involved parties and to understand who, what and how different items are involved in processes.

The RASCI-VS filter can be applied to the following items:

a. Roles
b. Assets
c. Resources
d. Org Units

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> To use the filter effectively, a user **MUST** have the desired item (Roles, Assets, Resource or Org Units) enabled in the “Icons & Annotations” section.

M. **Icons & Annotations:** The Icons & Annotations filter allows users to decide how information and items relating to processes will be displayed on the process map. The three main options are as follows

Item	Description	Example
Icon	A graphical representation of a specific item in the EPC	
Annotation	An expansion of Icons with full textual description of the specific item	
None	An option to be selected if a user wishes to hide items from a graph	

> This feature allows users to organize their process maps. Simple processes can feature “Annotations” effectively, however “Icons” are recommended for more complex process viewing.

In-Graph Icons

Icon	Item
	Roles
	Assets
	Documents
	Resources
	Org Units
	Risks

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	Rules
	Controls
	Objectives
	Entities
	Attributes
	KCI
	KPI
	KRI
	Materials
	IPL
	Categories
	Annotation
	Event & Gateway Name

How to Enable Icons & Annotations

Users can enable Icons and Annotations within “Options” section. To enable Icons & Annotations, please see the steps below:

1. Select “Options” icon

2. Navigate cursor to Icons & Annotations section

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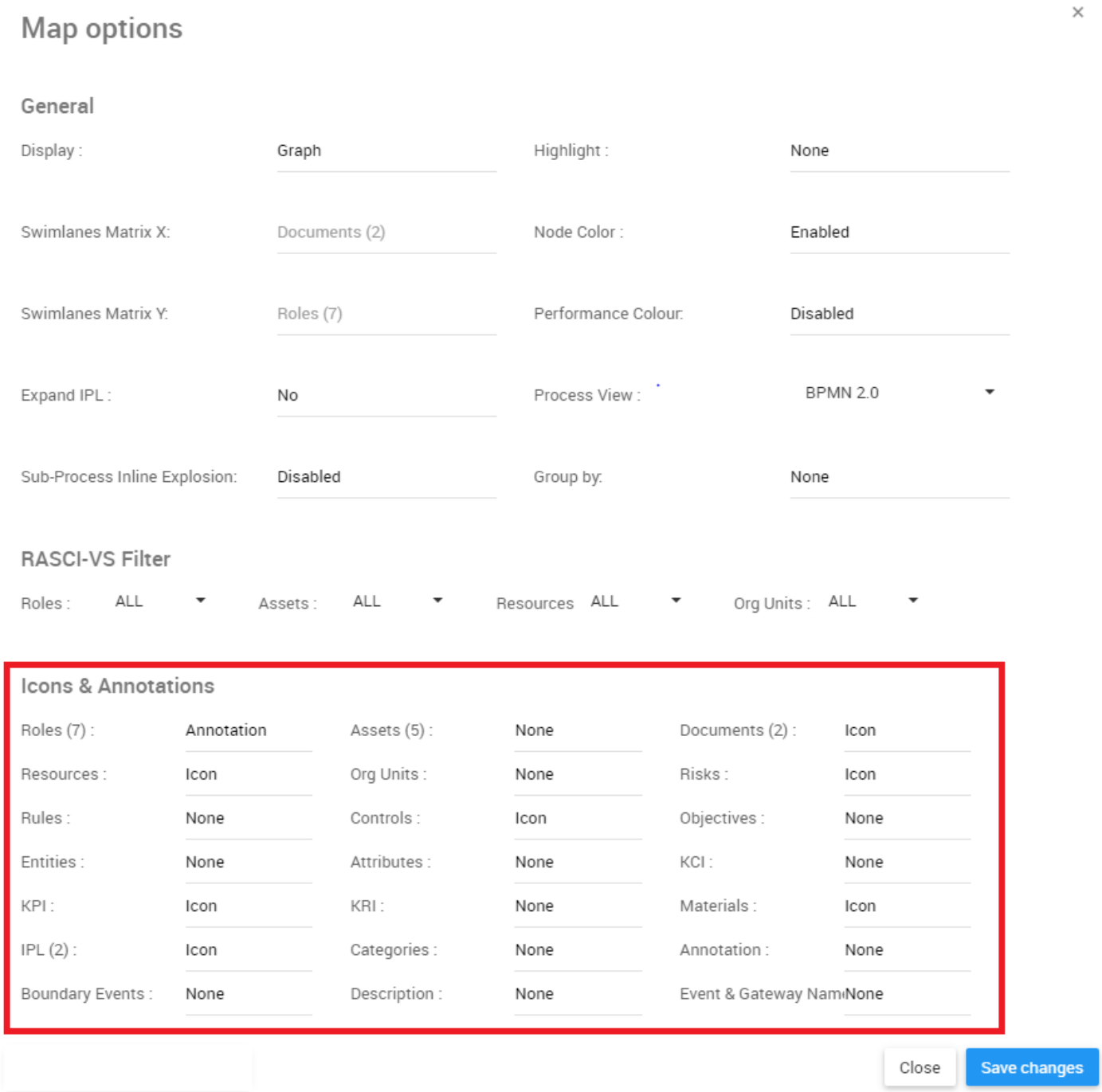

3. Navigate to the item you wish to select. For this example we will select the “Assets” item. Select the Assets bar

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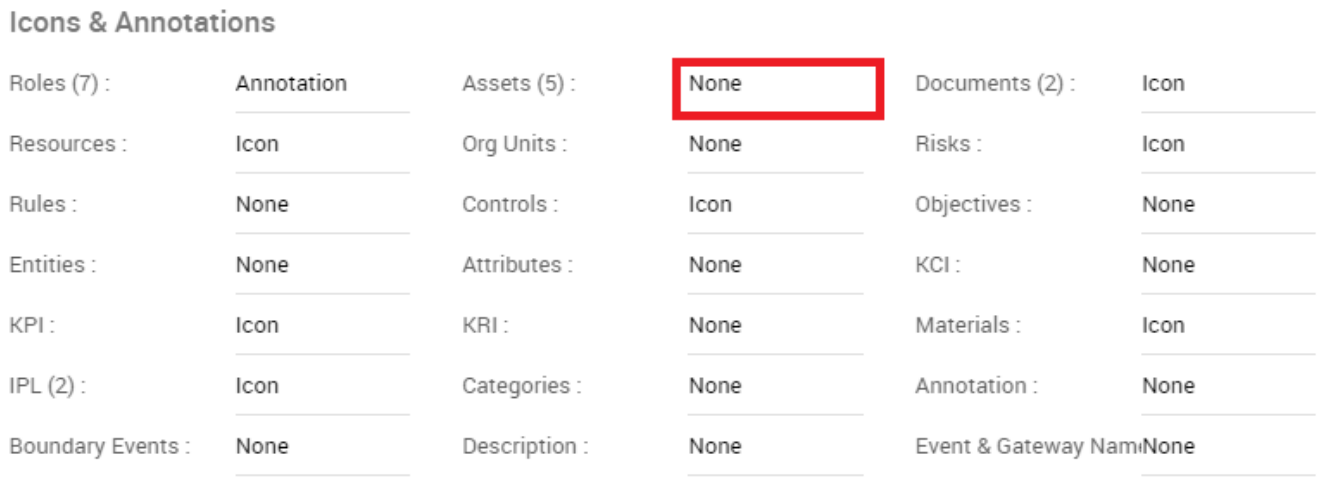
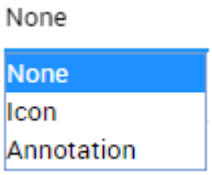


4. Clicking on the bar will generate the following drop-down menu



5. Select the desired notation and click the “Save Changes” at the bottom right of the page.

How to Re-Organize Annotations

The EPC allows users to shift the position of Annotations within a Graph to optimize viewing capabilities. Users can reorganize annotations based on a **pre-set placement** options, or personalize their map through **personalized map customization**.

To use the **Pre-Set Placement** options, Please see the steps below:

1. Enable Annotations for a particular item

2. Click on the Annotation that you wish to reorganize. The item in question will be highlighted as follows

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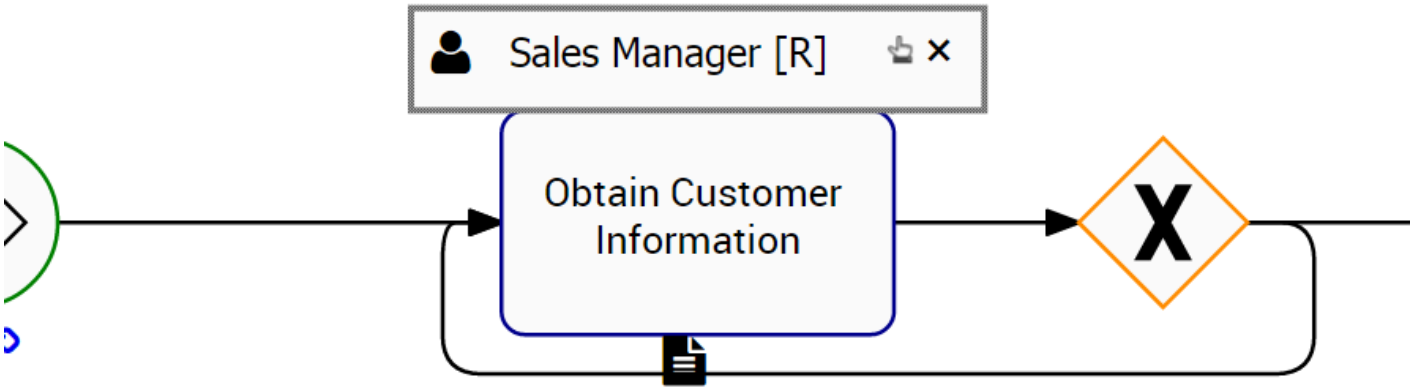
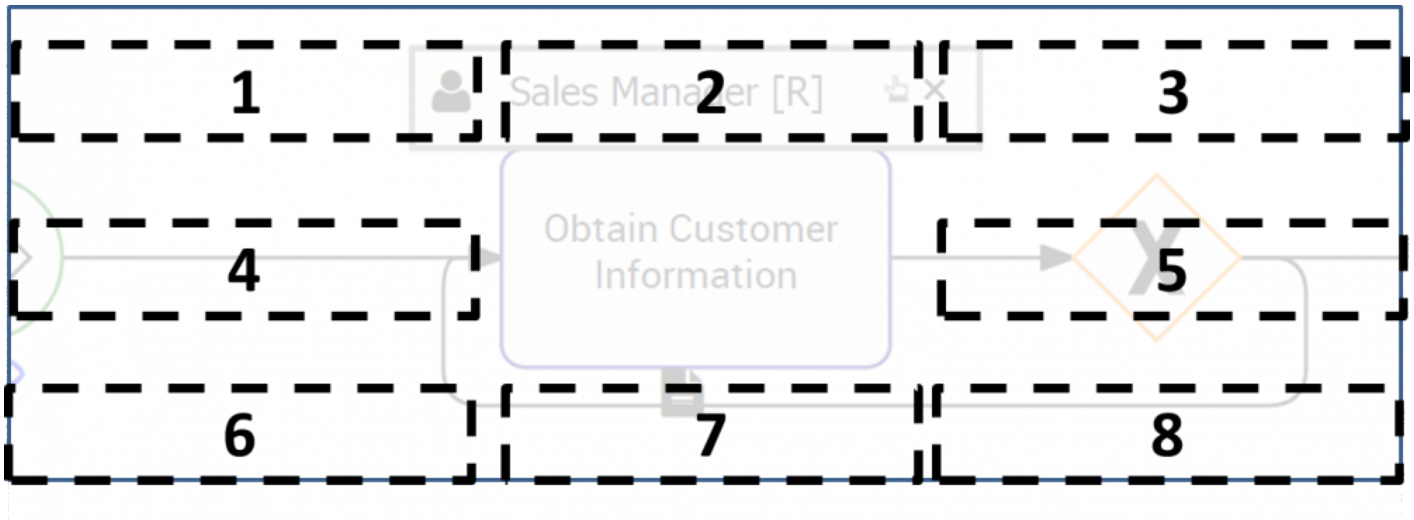
3. A user can select 1 of 8 positions to move the annotation. The graphic below highlights the 8 available options





4. Click and hold the Annotation. Drag it to the desired location

To user **Personalized Map Customization**, please see the steps below:

1. Enable Annotations for a particular item

2. Click on the Annotation that you wish to reorganize. The item in question will be highlighted as follows

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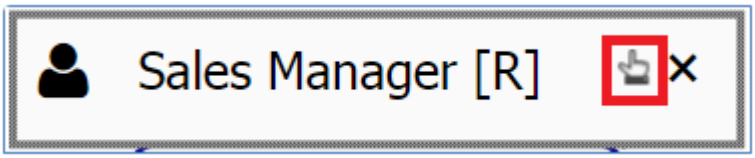
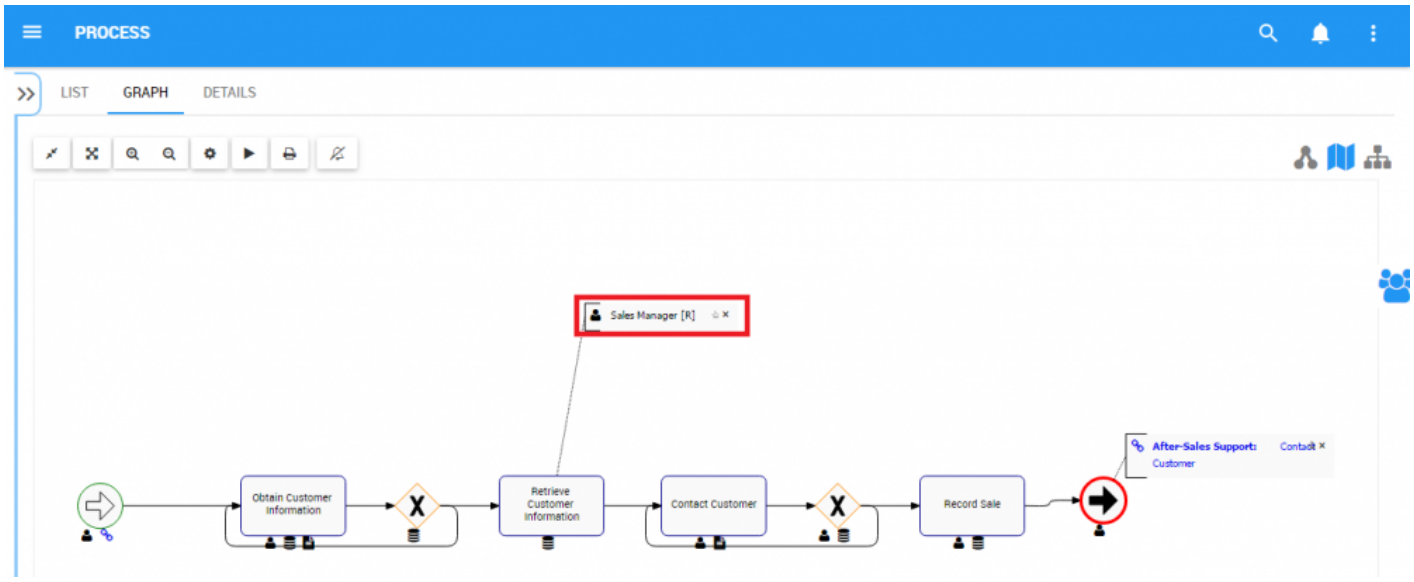
3. Select the icon **once** located on the right hand side of the annotation



4. After clicking the icon, it will fade and be displayed as . This is an indication that you have selected the item in the Map Graph and can relocate the the annotation anywhere in the graph.

5. Navigate your cursor over the annotation until the icon is displayed.

6. Once the icon is displayed, click on the annotation and move is to the desired location on the page.



It is recommended that users select the layout that minimizes overlapping objects

Expand Icons

The EPC allows users to manually expand Icons to Annotation format. Expanding Icons into Annotations allows users to see additional details about specific items within the process.

Please see the steps below:

1. Enable Icons for an item

2. Navigate cursor to icon

3. Double Click on the icon and it will expand into annotation format

4. You can minimize the Annotation, returning it to Icon format by clicking on the ✕ on the right-hand side of the annotation

Document icons allow users to preview the electronic documents uploaded in the EPC. The "Preview" button is symbolized by icon. Simply click on the icon to preview the document.

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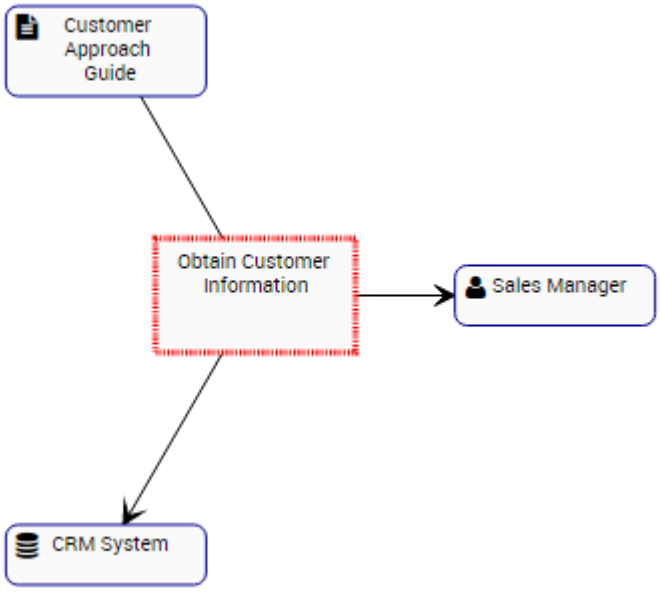
4.4.3.3 Impact Graph

Impact Graphs provide a visual representation of the upstream and downstream associations related to items in the EPC. In simple terms, Impact Graph is a technique for visualization of associations and links with various processes, tasks or objects. Visualizing the different associations within an organization allows users to better understand the complexity or certain business activities, as well as the true effect of changes within the process of an object.

Impact Graph



The example features the Impact Graph of the “Obtain Customer Information” Task. The Task itself has a Document (Customer Approach Guide), a Role (Sales Manager) and Asset (CRM System) associated with it. The specific nature of the items associated is denominated by the icon featured next to the name of the items.

The Graph provides an initial visual representation of items that **directly** impact one another. Users can additionally expand the Impact Graphs to view **indirect** associations.

Users can **double click** on specific items within the Impact Graphs, which will display the associations to that item.

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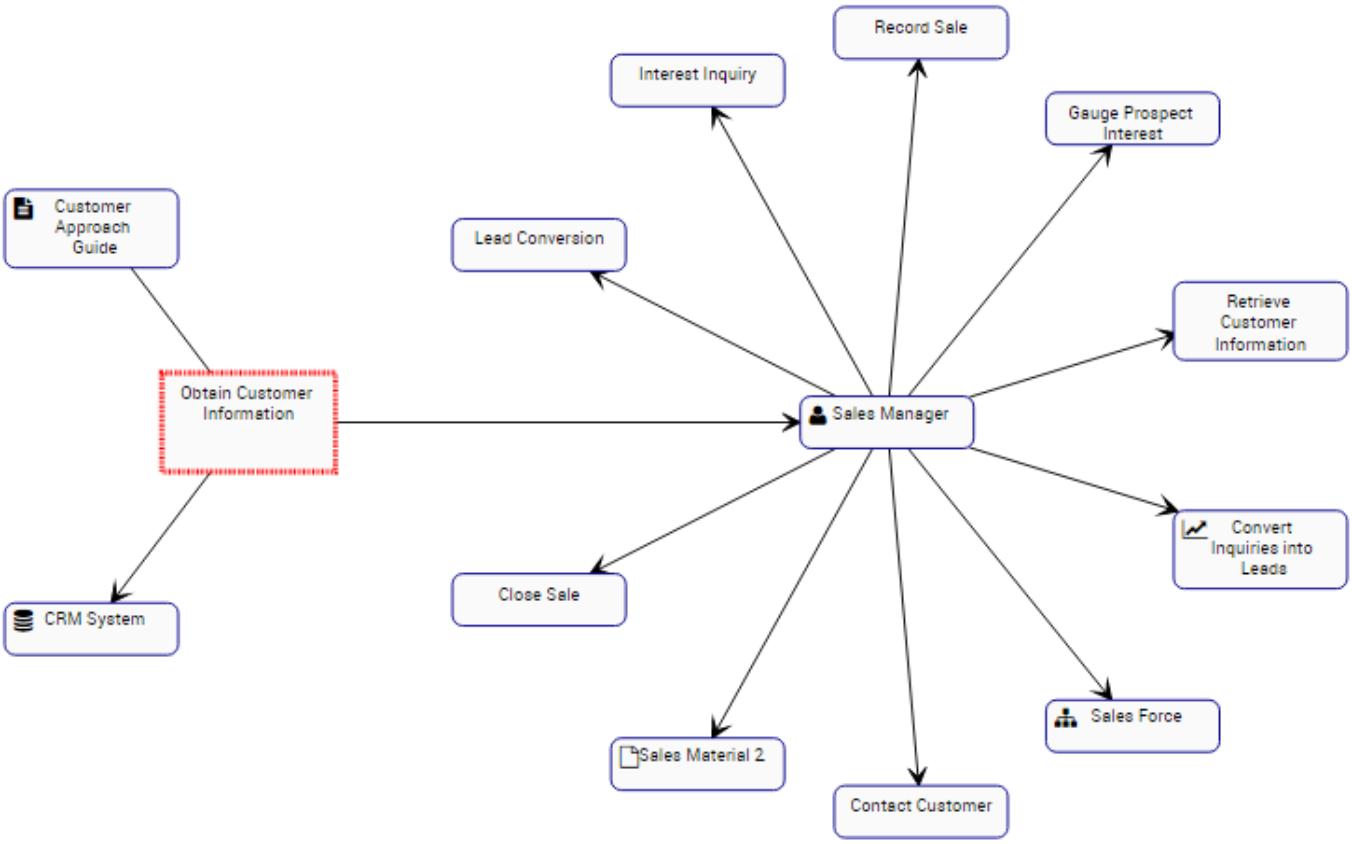

These Impact Graphs can be used to educate business users, to analyze internal business processes and help management optimize activities effectively. Additionally, they help in the preparation of change management plans, allowing managers to map out the effect of any organizational change.

Impact Graph Navigation

To navigate to Impact Graphs, please see the following instructions.

1. Navigate to the Graph tab

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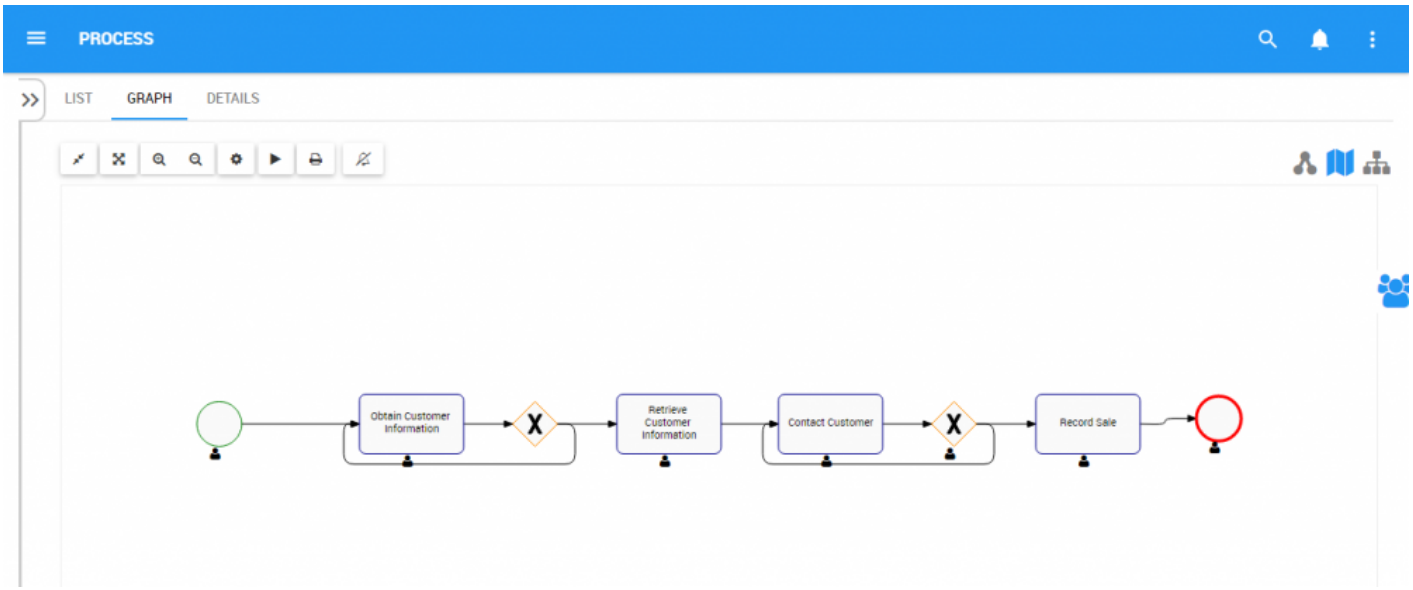
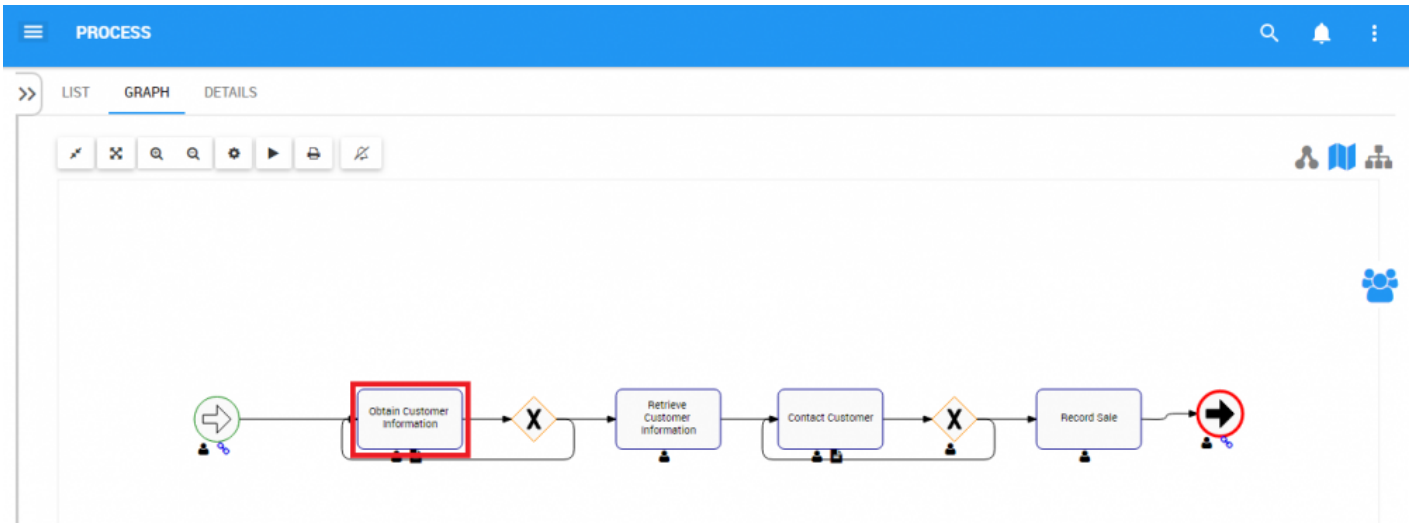
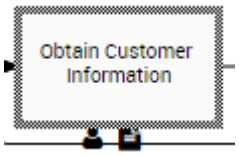


2. By default, a user will be navigated to the Processes Map Graph. To view a specific item's Impact Graph, a user must **select** the item prior to navigating to the Impact Graph view. For this example, we will select "Obtain Customer Information" task by clicking on the item



3. Once the item is selected it will be highlighted and will display the following



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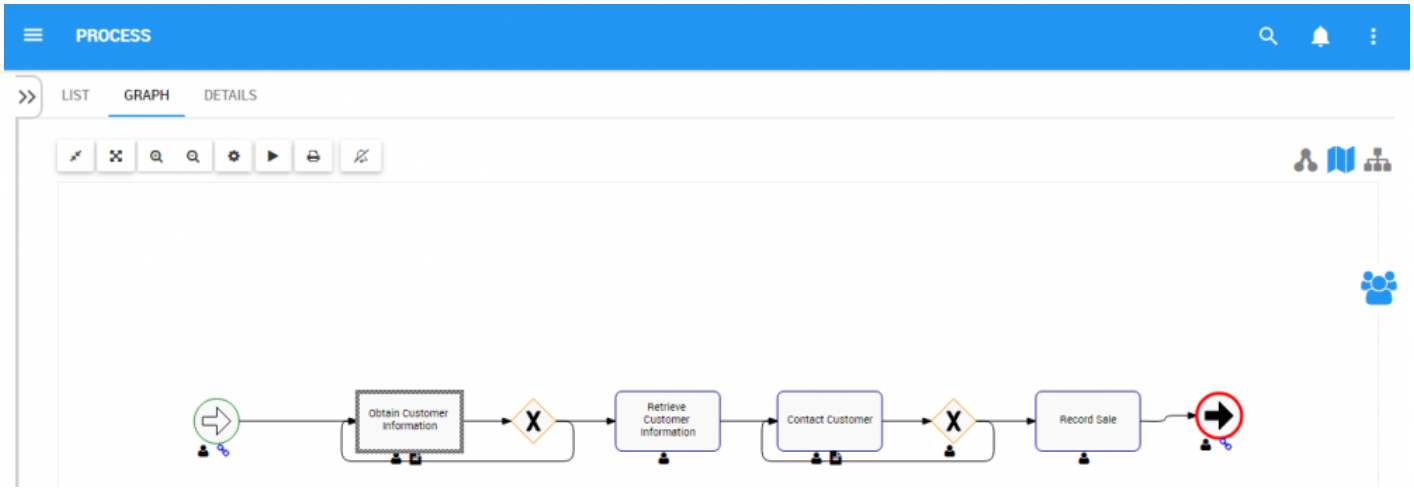
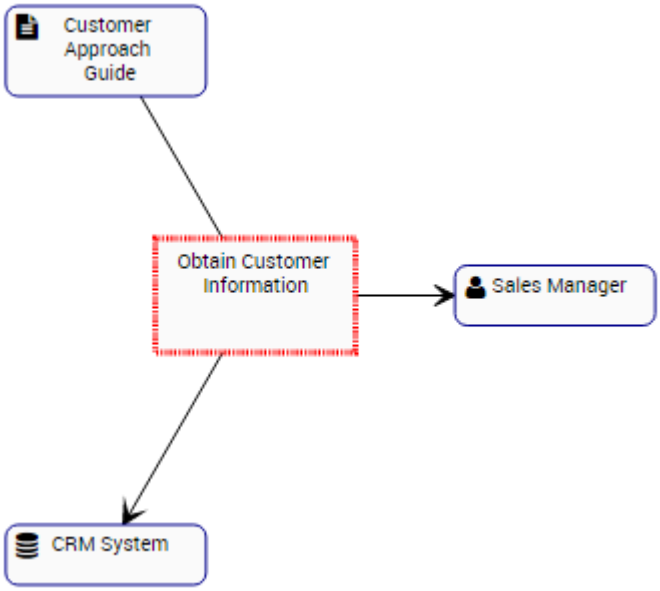
4. Now select the Impact Graph icon



5. You will be navigated to the specific item's Impact Graph



6. (Optional) To further expand the Impact Graph, simply double-click on the item you would like to expand

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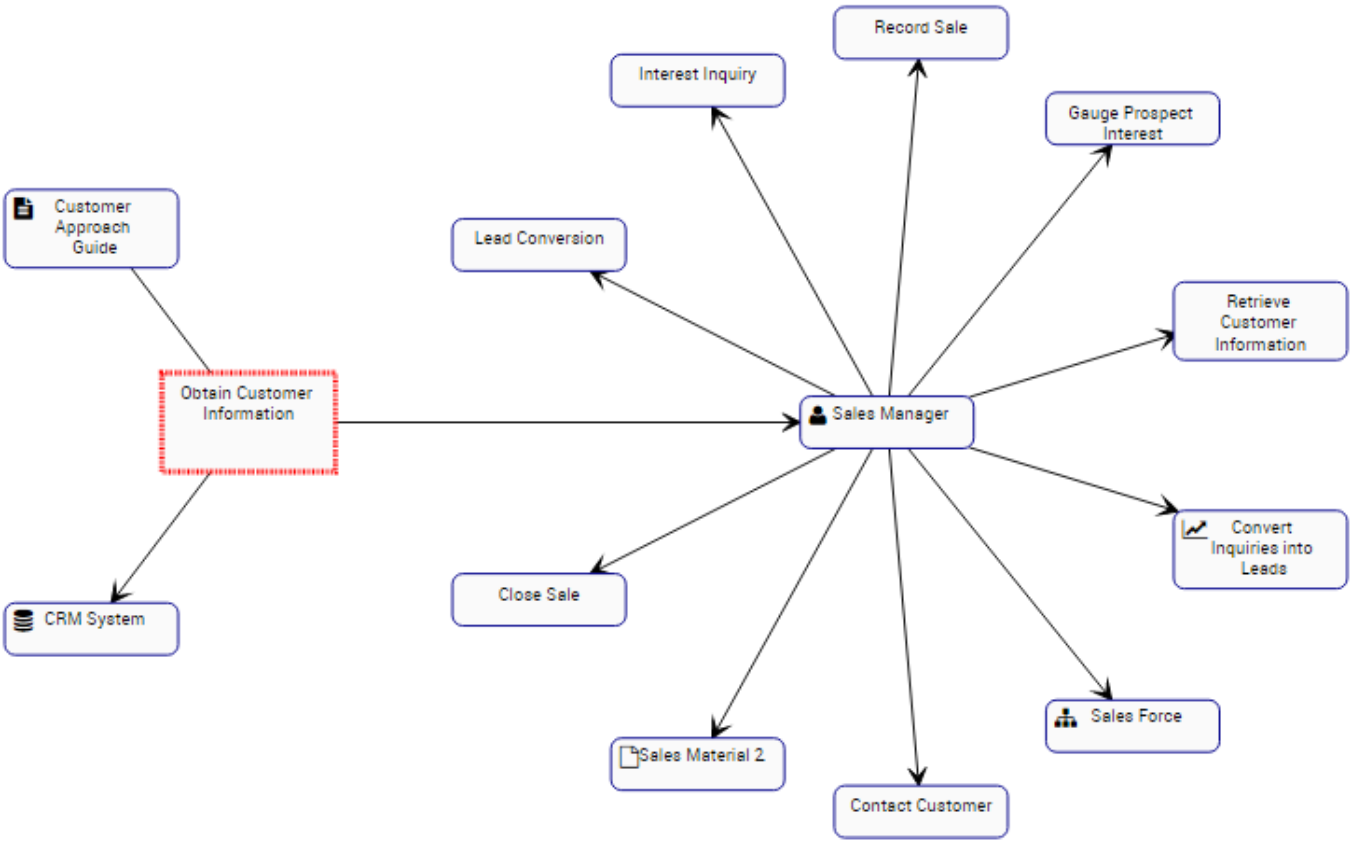
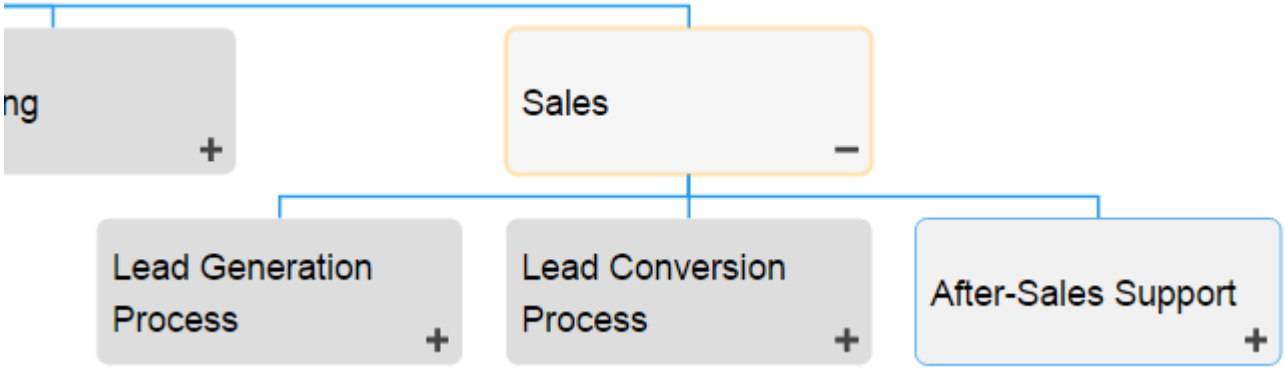

Record Sale
Interest Inquiry
Gauge Prospect Interest
Customer Approach Guide
Lead Conversion
Retrieve Customer Information
Obtain Customer Information
Sales Manager
Convert Inquiries into Leads
Close Sale
CRM System
Sales Force
Sales Material 2
Contact Customer

4.4.3.4 Hierarchy Graph

Hierarchy Graphs allows users to view the vertical and horizontal hierarchy of processes. This view provides users with a graphical representation of where specific processes fit within the overall organization. Users can utilize Hierarchy Graphs to view a top-down view of organizational processes.

Hierarchy Graphs show users to see all business processes and where they fit within an organization. This allows organizational users to understand organizational activities and gauge complexity of business processes.

Users can expand and close organization process sets easily, allowing users to view a high-level organization structure, and expand sections they wish to gain further information on.



Hierarchy Graph Navigation

To navigate to Hierarchy Graphs, please see the following instructions.

1. Navigate to Process Module

2. Select the item to which you would like to view.

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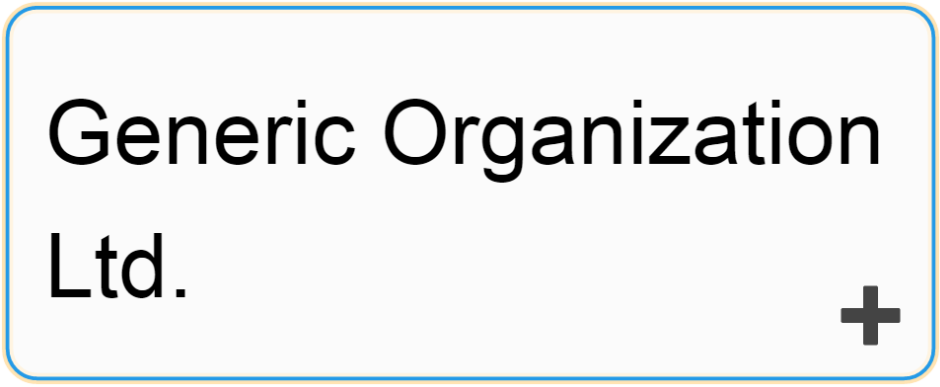
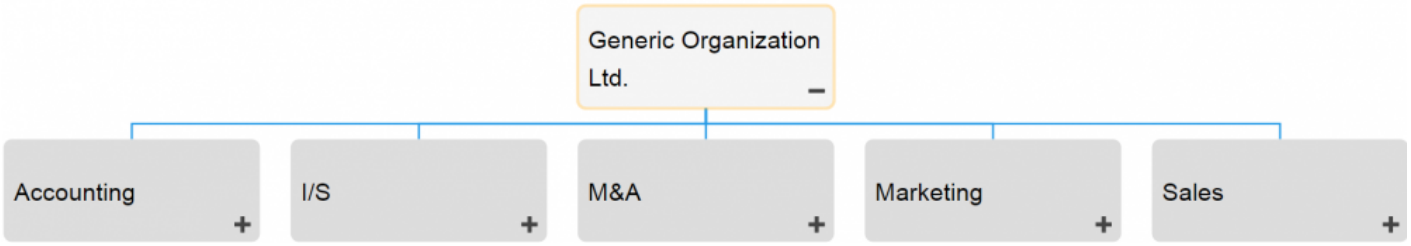
> The further you navigate into processes, the more you limit the scope of Hierarchy Graphs. To view a complete picture of the organizational structure of processes, select “Process Sets”

3. By default, you will be navigated to Map view. To select Hierarchy Graph view, select the icon.

4. You will be navigated to the “Process Sets” Hierarchy Graph. The entire process will not be fully displayed upon initial navigation and will display the individual item selected.



5. To further expand components of the Hierarchy Graph, double click on the on the objects in the Graph. This will expand the item selected.



6. Repeat step 5 until you reach the desired depth.

7. To close opened items, double-click on the icon

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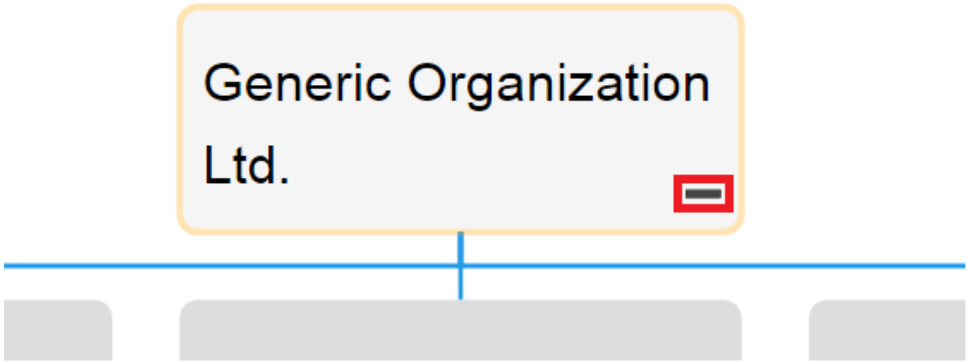

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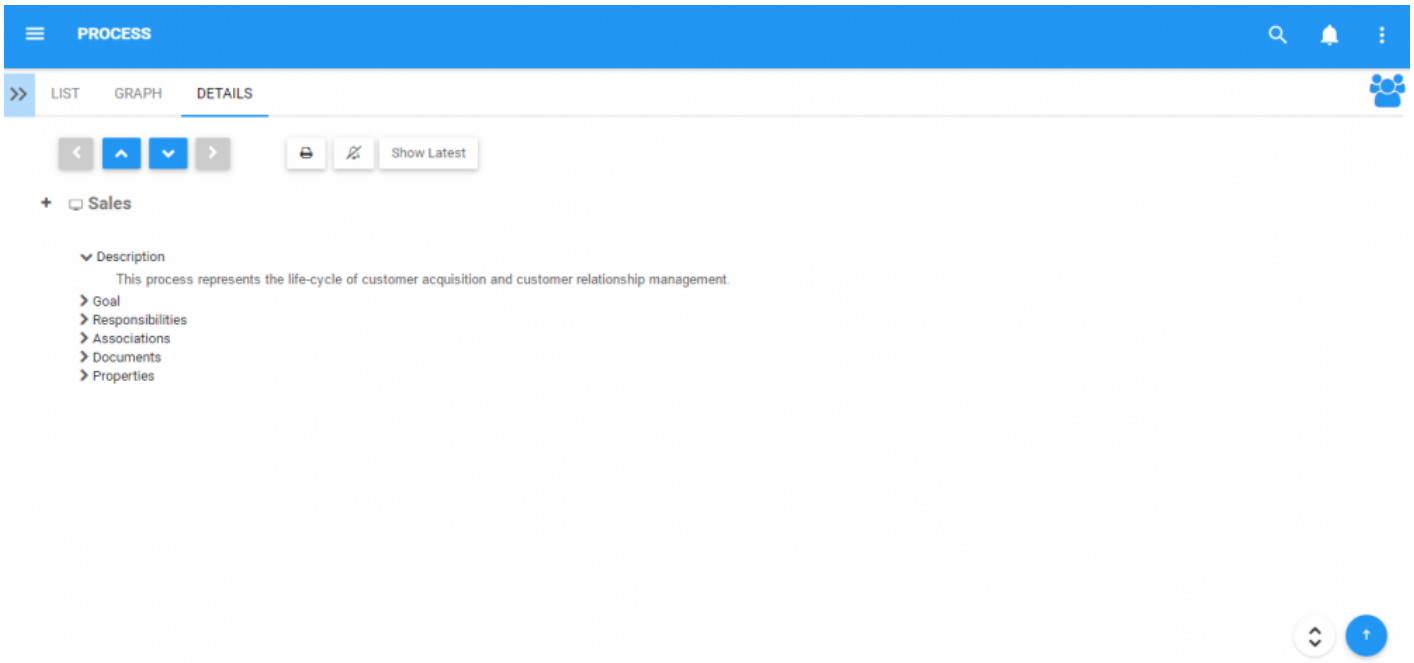
4.4.4 Details

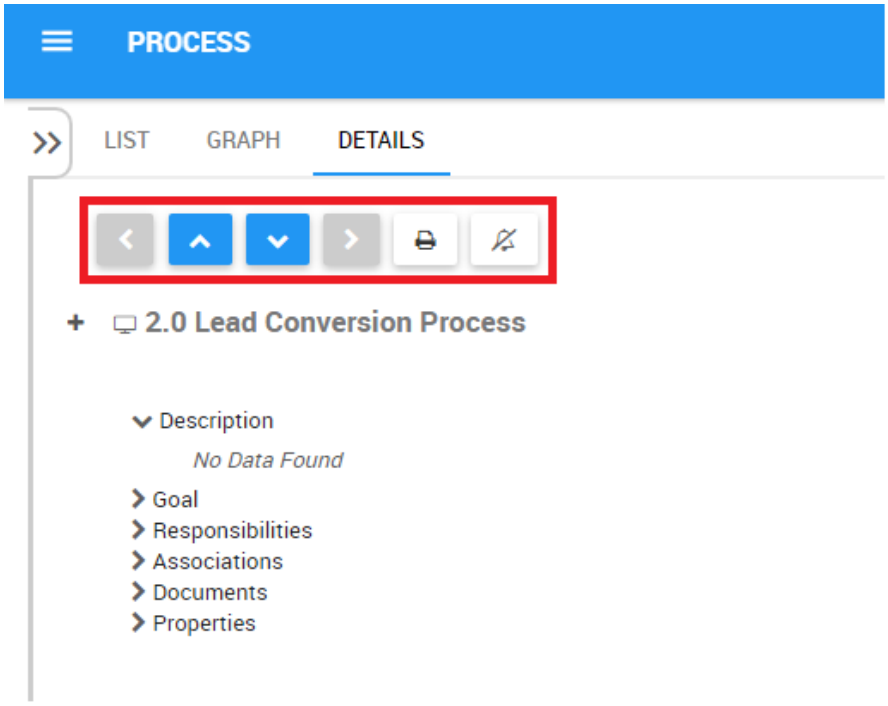
The Description section is where you will find details about the process or flow object you are observing. This rich text area allows for the display of all additional details that has been uploaded regarding the item in particular. These details provide users with all critical information about items that has been uploaded by EPC Modelers.

The details section is where users can see all information about items.



4.4.4.1 Navigation

Users can navigate between items using the **toolbar** at the top of the page. Further details can be found in the toolbar section below.



Users can also navigate to Details Drilldown of an item by using the button on the left-hand side of the page. Further details can be found in the sub-components section below.

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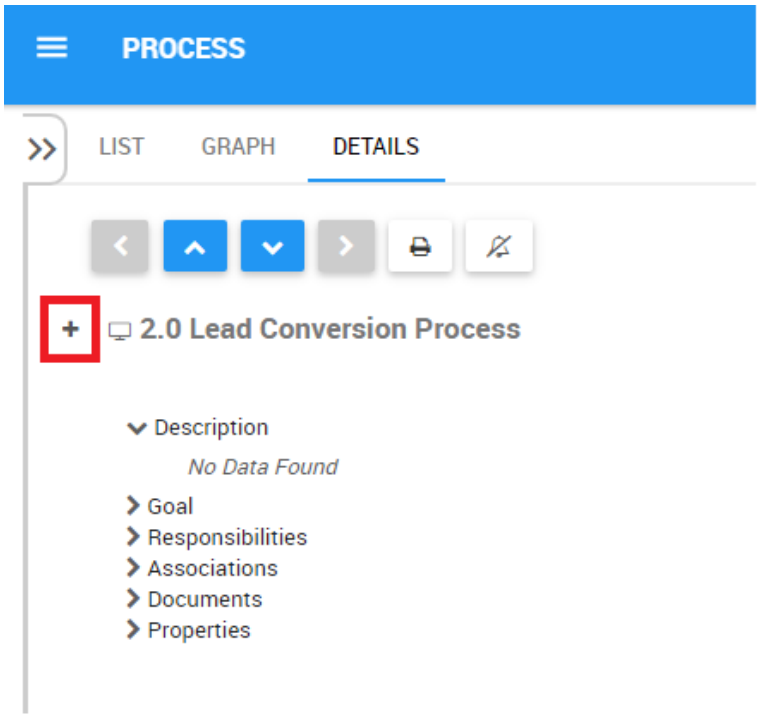

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4.4.4.1.1 Toolbar

The toolbar provides users with a variety of functions to navigate and leverage the details page.

Item	Icon	Descriptions
Value-Stream Navigation		The side-to-side arrows allow users to navigate from item to item within a given process
Hierarchy Navigation		Hierarchy Navigation allows users to navigate vertically from item to item without exiting the details page
Print		This button will allow a user to print the details page being viewed
Subscribe		This button will allow a user to subscribe to the process being viewed. The icon will be displayed in white when a user is **not subscribed** to an item The icon will be displayed in blue when a user **is subscribed** to an item.

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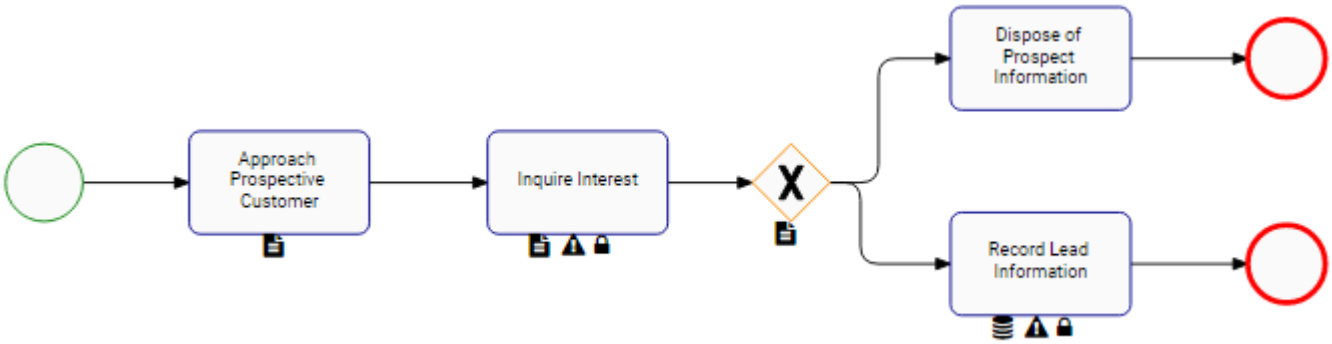
4.4.4.1.1.1 Value-Stream Navigation

The side-to-side arrows allow users to navigate from item to item within a given process, without exiting Details view. This allows users to, directly on a details page; navigate from 1 item within a process to the next.

For example, take the following process.

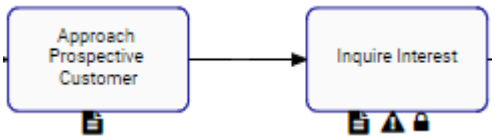


A user can navigate directly from the Details page of “Customer Approach” directly to “Interest Inquiry” and vice versa.

Users can use this function when there is Single Navigation Path, and when there are Multiple Navigation Paths.

Single Navigation Path:

A Single Navigation Path is a scenario where there is only directional inflow and outflow to a process object. The following image shows a Single Navigation Path scenario.



Please see the following instructions to use the Value-Stream Navigation arrows in a Single Navigation Path:

1. Navigate to Graph View

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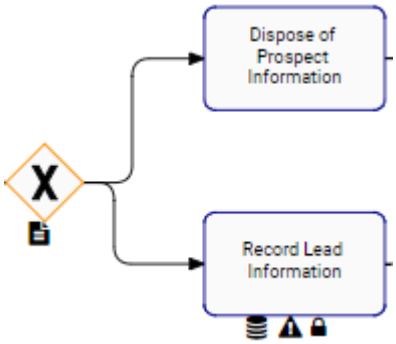
2. Click on a desired Task (e.g. Approach Prospective Customer)

3. Navigate to details page of “Approach Prospective Customer”

4. THEN the will be enabled, allowing a user to navigate directly to “Interest Inquiry”

Multiple Navigation Paths

Multiple Navigation Paths are presented when a process inflow or outflow can have multiple different scenarios. This happens when an object requires multiple inputs, or if an object can have multiple outputs. The following image shows a Multiple Navigation Path scenario.



Please see the following instructions to use the Value-Stream Navigation arrows in a Multiple Navigation Paths:

1. Navigate to Graph View

2. Click on a desired object. In this case we will be selecting the “Gauge Prospect Interest” Gateway represented by

3. Navigate to details page of the selected object

4. Select the arrow, which will create a drop-down window

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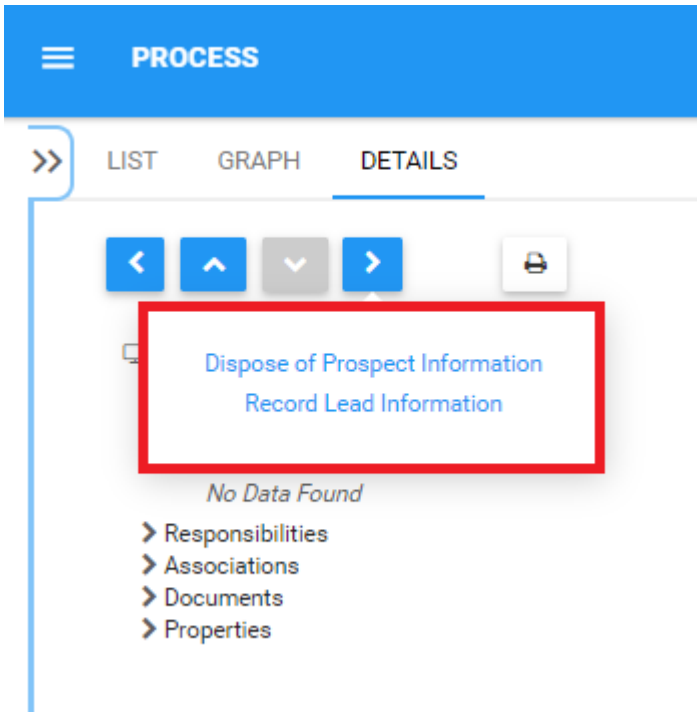

5. The window generated will provide the possible navigation destinations for the user. Select the desired destination and the user will be navigated to the details page of the selected item.

The arrows will only be enabled if there is an additional item within the process to navigate to. If a user selects an item at the end of a process, then the user will not be able to further navigate right and will have the right arrow disabled.

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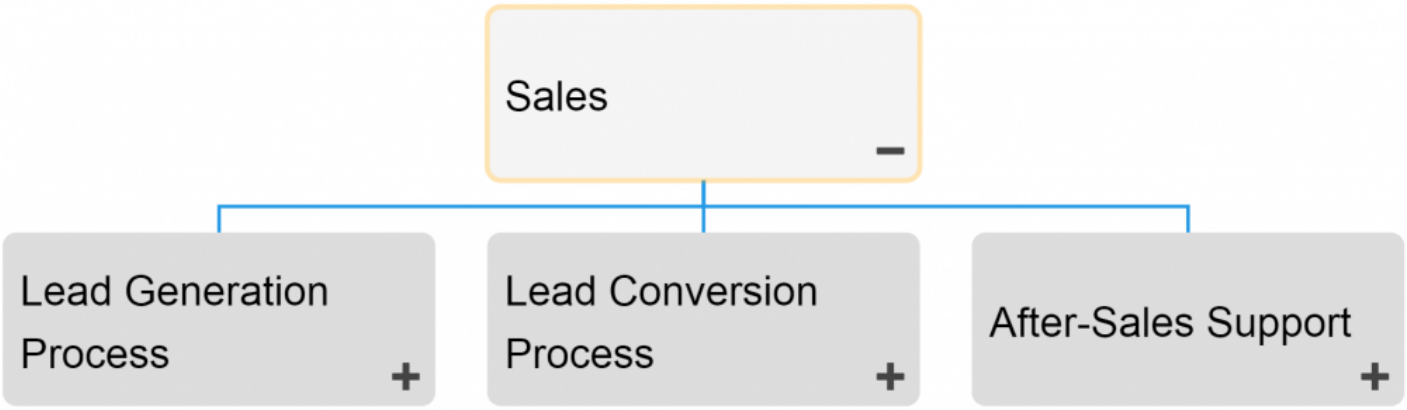
4.4.4.1.1.2 Hierarchy Navigation

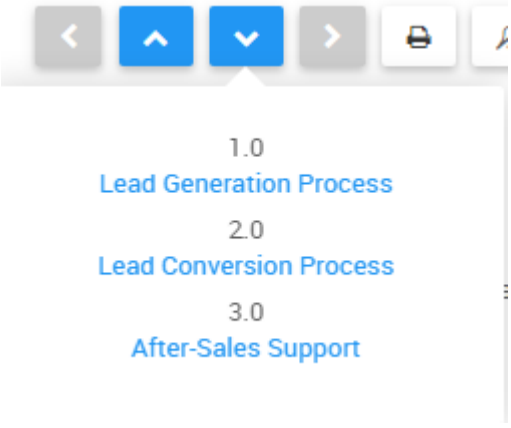
Hierarchy Navigation allows users to navigate vertically from item to item without exiting the details page. Using the and buttons, users can navigate from process sets to processes, processes to sub-processes, and so on. The hierarchy follows the format that can be viewed in the **Hierarchy Graph**.

For example, take the following scenario.



If a user is on the Details page of “Sales”, he or she can directly navigate to the details page of “Lead Generation Process”, “Lead Conversion Process” or “After-Sales Support” using the button.

When multiple items can be the ultimate destination of navigation, users will have a drop-down menu prompted on the screen after selecting the button.



Simply click on the desired item you wish to navigate to and you will be prompted to this item’s page.

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4.4.4.1.1.3 Print

The print button allows users to directly print the details page that they are currently viewing. Selecting the print function will automatically generate a formatted details page printout that a user can print directly.

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2.0 Lead Conversion Process

- Description
  - *No Data Found*
- Goal
- Responsibilities
- Associations
- Documents
- Properties

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4.4.4.1.1.4 Subscribe

The subscribe function, symbolized by the icon, has been added to allow users to track items, objects and processes in the EPC. Users can subscribe to specific items or processes to simplify and centralize monitoring activities. By subscribing to items, users will receive notifications when items or processes are altered or optimized. Additionally, item subscriptions is a useful filter and option for Home page Widgets, allowing users to create Widgets featuring items they deem as critical to their individual jobs.

To use this function, simply click on the subscribe button, which will change from to .

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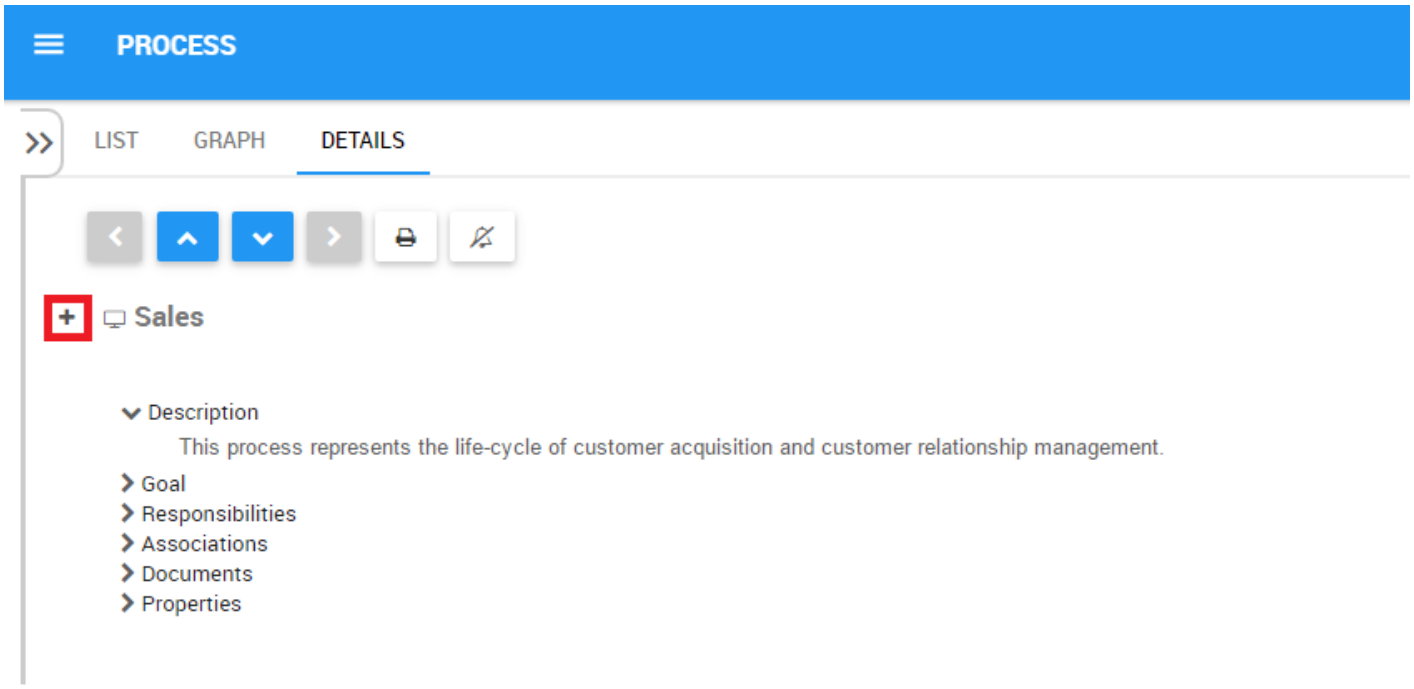
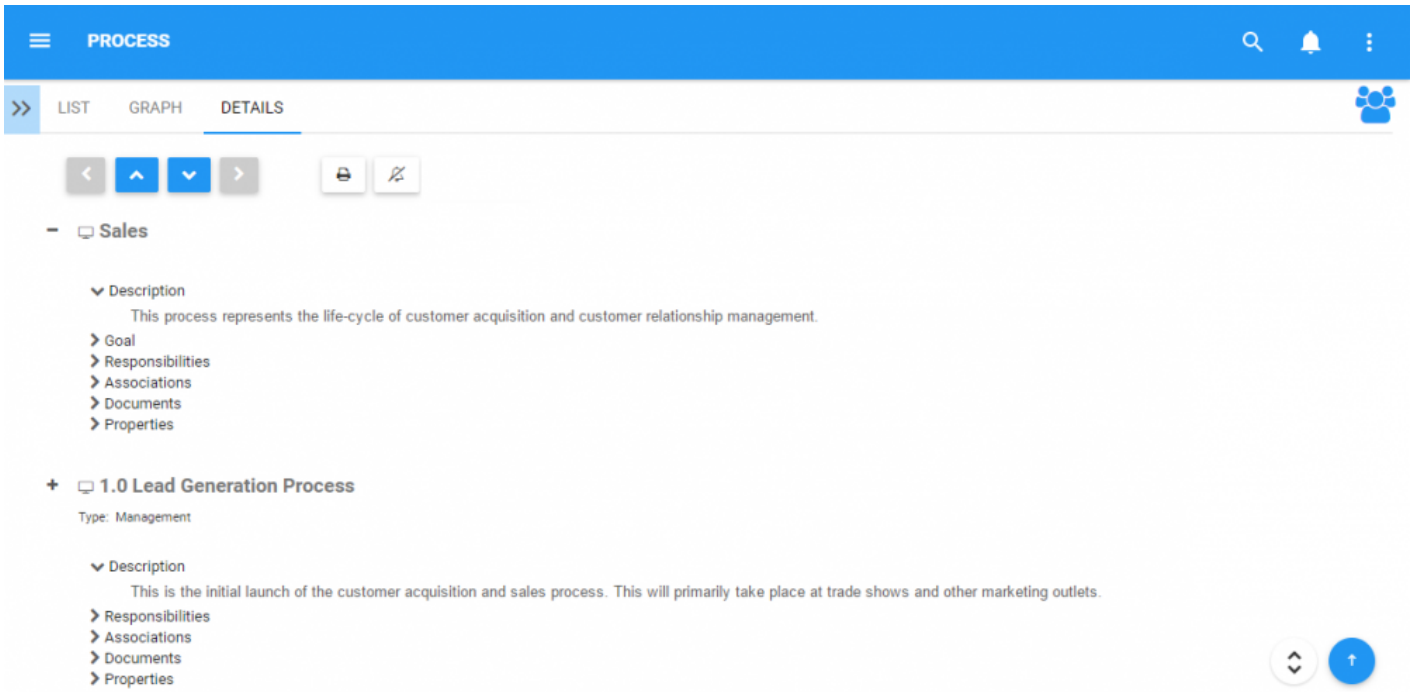
4.4.4.1.2 Details Drilldown

Users can expand Details lists to view the sub-components of specific processes and process sets within the details page. Allowing users to expand sub-components lets users quickly navigate various details sections within the same page.

Use the sub-component expansion feature click on the + icon on the left-hand corner of the page.



For example:



This will cause all sub-components of the items to load within that given page. This action can be repeated multiple times within a given page until there are no additional layers to expand.

Minimize loaded sub-components by clicking the − button. Once a sub-component has been loaded, the − will replace the +.

4.4.4.2 Attributes

Users can find a variety of information about processes within the details section. This information allows users to fully understand all information about specific items, and provides users with a specific destination that can be used to see and gather all relevant information. Process Details display the following content

1. Description
2. Goal
3. Responsibilities
4. Associations
5. Documents
6. Properties

By default, the attributes within the Details module will be collapsed. Users can expand these attributes by:

1. Clicking on the › next to each item to expand **individual** attributes
2. Clicking on the icon at the bottom right corner of the page to expand **all** attributes

> Selecting different items will result in different information being displayed. The above components specifically relate to information that will be provided for processes and sub-processes. Note however that all relevant information for items will be displayed.

> The details page ONLY populates details that are specific to each item. For example, if a document is tied to a task, it will only appear in the details page of the task and not in the details page of the process. Users must navigate to the specific item they wish to obtain it's full set of details.

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4.4.4.2.1 Description

The description section provides users with all details relating to what a process is, as well as particular information that can assist with process execution. This information, populated by EPC Modelers, will provide further details for users to.

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4.4.4.2.2 Goal

The goal section reports static information about what the objective of the overall process is. This information pertains to overall objectives of processes and what they are supposed to accomplish. This field is populated textually by the EPC Modeler.

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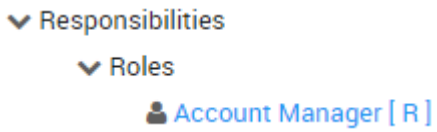
4.4.4.2.3 Responsibilities

The Responsibilities section displays de roles, resources and/or assets that are responsible for executing the particular process or flow object you are viewing. This provides additional details about any associated object that has been tied to the object using the RASCI-VS matrix.

Users can navigate directly to the item pages that are featured in this section. Users can click on the specific item's name highlighted in blue. You will be redirected to the item's details page.



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4.4.4.2.4 Associations

The Associations section lists all of the Documents, Rules, Risks, Controls, Performances, Services, and Master Data that are associated to the process or flow object. This allows users to quickly see what specific items have been tied too.

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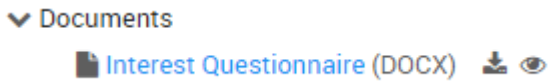
4.4.4.2.5 Documents

This section lists all documents that have tied to the item being viewed. This provides users with a list of relevant documents, as well at the ability to directly access these documents. Users are additionally provided details regarding the document type (docx, pptx, URL, xlxs, etc.)

Users are provided with a direct access link listed in blue. Clicking on the name will navigate a user to the documents details page.



To directly access the document, users can preview, or download the document in question.

1. **Preview**: To preview the document click on the icon. Please see the list below for documents available for preview.

2. **Download**: To download the document click on the icon

Documents Available for Preview:

PDF Files	Available with extension **Adobe Acrobat**	Available with extension **Adobe Acrobat**	Available with extension **Adobe Acrobat**	Available with extension **Adobe Acrobat**	Available with extension **Adobe Acrobat**
Image Files • Png • Jpeg, jpg • Gif • Svg, svgz • Tif, tiff •	Available (all)	Available (all)	Available (all)	Available (all)	Available (all)

Wbmp • Webp • Ico • Jng • bmp					
URLs	Available	Available	Available	Available	Available
File Links	Available with extension **LocalLinks**	Available with extension **Local Filesystem Links**	Available if **Trusted Sites** added*	Unavailable	Unavailable
MP3 Files	Available	Available	Available	Available	Available
MP4 Files	Available	Available	Available	Available	Available
Wav Files	Available	Available	Unavailable	Available	Available
Ogg Files	Available	Available	Unavailable	Available	Unavailable

For further details regarding document previewing, please see Section 4.7.4.1.1.2.

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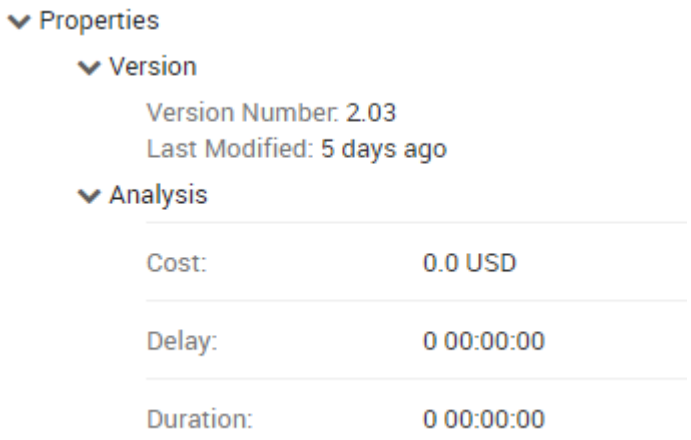
4.4.4.2.6 Properties

The properties section provides users with additional key information about items. The properties section is broken down into 2 categories:

1. **Version**: Provides information about what version is being viewed, and when the latest modification has been made
2. **Analysis**: Provides information that better allows users to analyze items and related key details. The analysis items are Cost, Delay and Duration.



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4.5 Performance

The Web App allows users to monitor the performance of their processes and business activities in a customizable and color coded environment. Viewing Performance Measures provides users with up-to-date information, enabling them to assess and optimize individual performance. This in turn, educates, motivates and improves organizational performance.

The typical performance measures are as follows:

Performance Measure	Descriptions
Key Performance Indicator (KPI)	An indicator which enables an organization to define its performance targets based on its goals and objectives and to monitor its progress towards achieving these targets.
Key Control Indicator (KCI)	An indicator which is used by organizations to help define its controls environment and monitor levels of control relative to desired tolerances.
Key Risk Indicator (KRI)	An indicator which is used by organizations to help define its risk profile and monitor changes in that profile.

The EPC provides 3 types of graphs for users to view Performance Measures

1. Impact Graphs (default view)
2. Hierarchy Graphs
3. Overview Graphs

These views have various view-specific options that the users can define to display the performance measure in a way that best suits them best. For example: content, or objects, that are associated to the flow-objects can be shown as icons or annotations.

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4.5.1 Module Overview

Performance viewing is a key function of the EPC and allows users to view personal, role and company performance measures. The EPC provides 3 different dimensions, allowing users to properly view and understand performance measures.

Dimension	Details
1. List	Provides a list view of all objectives and performance measures
2. Graph	Provides the visual representation of performance measures and their features and links (Impact, Hierarchy, Overview Graphs)
3. Details	Provides additional key information regarding specific performance measures

Performance Measures that have been published from the EPC Modeler can be viewed in this module.

*How to access the Performance module:
*

1. Click on the **Navigation Menu Button** on the top left of your screen.

2. Click on *Performance *

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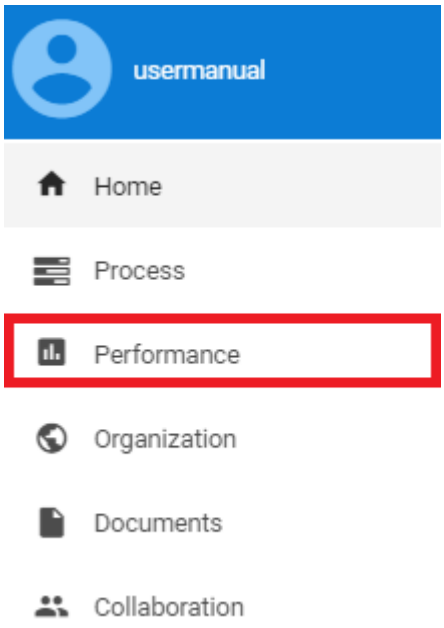

3. By default, you will be directed to **List View** in the Performance module (as seen below).

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4.5.2 List

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

List view provides a variety of Filtering and Sorting options, allowing users to easily find desired objectives and performance measures. These features are used to organize the items in the List View.

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

List	Description
1. List All	A list view where **all** items within the given module are listed
2. Drilldown List	A list view where **all levels below** the selected item are listed
3. Contextual List	A list view where **1-level level below** the selected item are listed

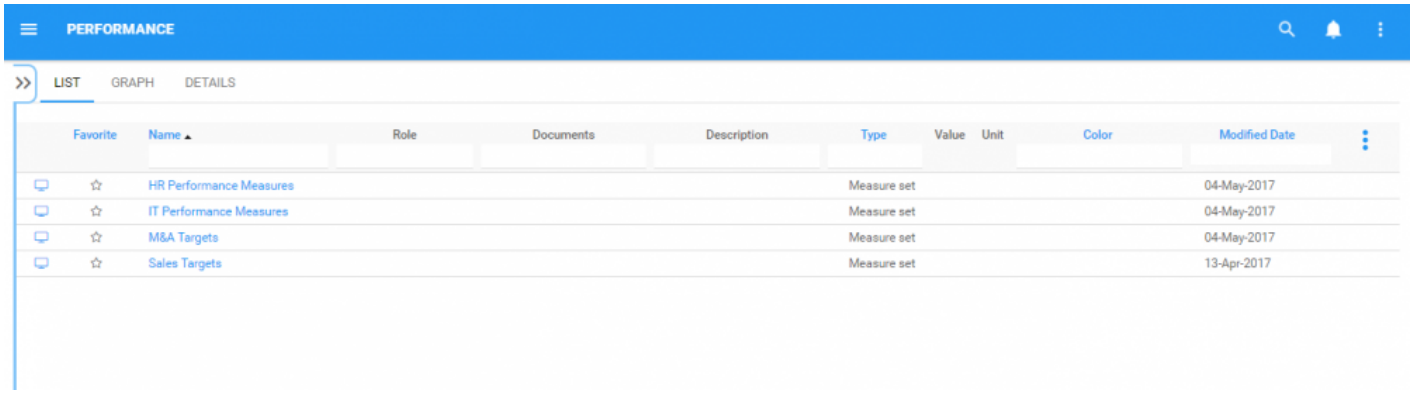
The selected list view will be saved both by web browser and by user.

To navigate to List View, please see the steps below:

1. Click on the **Navigation Menu Button** on the top left of your screen

2. Click on **Performance**

3. You will be directed to **List View** in the Performance module (as seen below).



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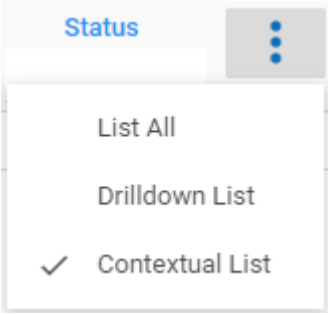
To simplify performance viewing; users **are not** greeted with all major performance measures and objectives that they are associated too. Users are greeted with the list of Measure Sets, the highest level of Performance Measure Classification in the EPC. However users can display these measures within the **List View**. Please see the **Optional** steps below:

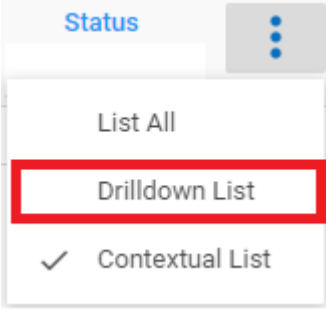
> These steps are only required if a user is using an account or browser for the first time. As noted above, list preferences will be saved by user and browser to simplify navigation.

4. **(Optional)** To view sub-processes, users must select the “Drill Down” icon available on the upper right to the EPC Web App.

5. **(Optional)** Click on the icon and it will generate a drop-down menu



6. **(Optional)** Select “Drilldown List” or “List All”



7. **(Optional)** Upon selecting the “Drilldown List”, the EPC will automatically re-fresh the page

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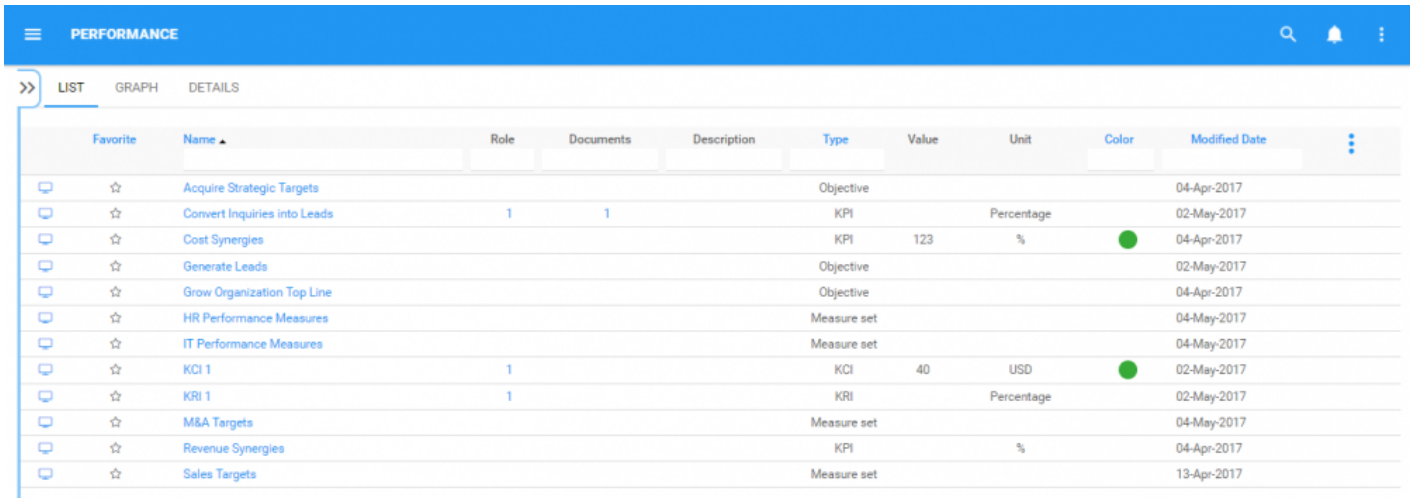

List Components

Components	Description
Favorite	Allows users to sort objectives and performance measures by favorites vs. non-favorites
Name	Textual search for any existing name of an item
Roles	Whether or not there are Roles directly associated with the item in question. Shows a number equal to the total number of roles assigned to the object. To view these roles, click on the number
Documents	Whether or not there are Documents directly associated with the item in question Shows ……
Description	Whether or not there is a Description inputted for the item in question Shows…..
Type	The type of the item
Value	The latest value inputted for the measure
Unit	The unit that the performance measure is being measured in
Color	The corresponding color representing the current performance (%(color-green)Green%-Above Expectations, %(color-yellow)Yellow%-Acceptable, %(color-red)Red%-Below Expectations)
Modified Date	The latest date that the item has been modified
Status	Shows the status of the item in question (published vs in-progress)

The number of columns displayed will be contingent on the user's screen resolution.

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4.5.2.1 Sorting

Sorting allows users to classify objectives and performance measures based on selected criteria. You can **sort** list results for any column title that is written in BLUE.

The following are the fields that users can use when sorting through Performance in List View:

Component	Description
Favorite	Allows users to sort performance measures by favorites vs. non-favorites
Name	Allows users to sort performance measures by a key number or word within performance measure names
Type	Allows users to sort performance measures by their specific typeAllows users to sort performance measures by a key number or word within performance measure names
Performance	Allows users to sort performance measures based on their associated performance (Green, Yellow, Red) based on attached KPI, KCI, KRI. Allows users to sort performance measures by their specific type
Modified Date	Allows users to sort performance measures chronologically by date last modified. Allows users to sort performance measures based on their associated performance (Green, Yellow, Red) based on attached KPI, KCI, KRI
Status	Shows the status of the item in question (published vs in-progress). Allows users to sort performance measures chronologically by date last modified

How to use “Sorting” Function

1. Navigate to the Performance Module

2. Navigate Cursor to desired **Category**

3. Click on the **Category**

1-Click will sort the Category in Ascending order, reflected by ?
2-Clicks will sort the Category in Descending order, reflected by ?
3-Clicks will Remove the sorting action

Ascending Example: The Name column is sorted in **ascending** order.

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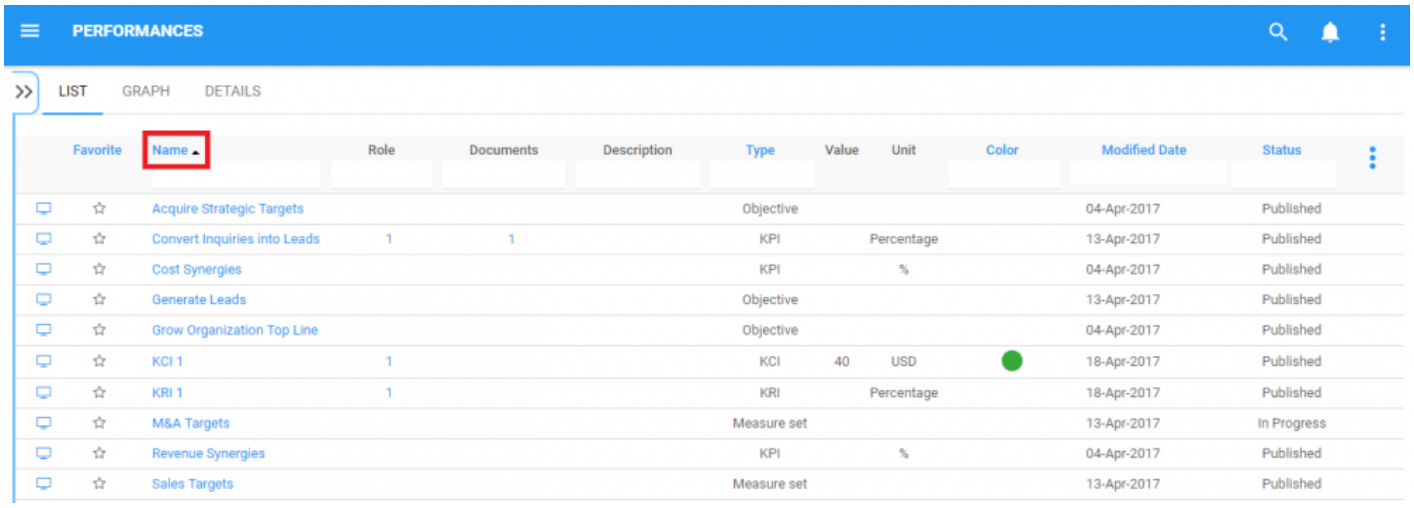
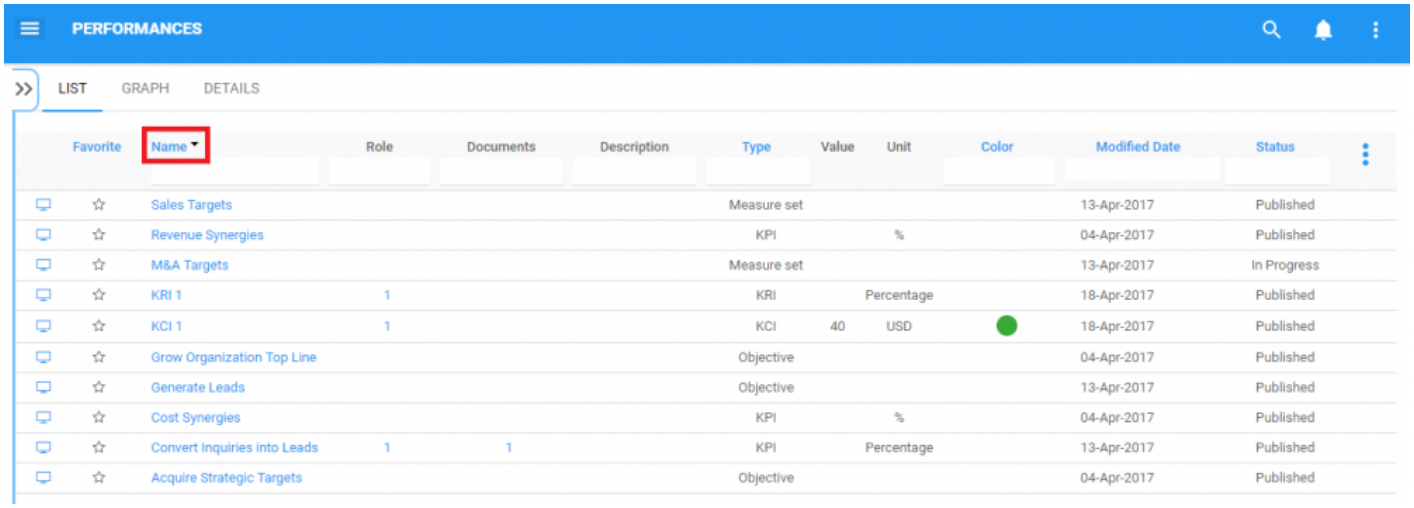


Descending Example: The Name column is sorted in **descending** order.



Multi-sorting (sorting multiple columns) is available.

4.5.2.2 Filtering

Filtering is a useful way for you to extract a specific subset of EPC content based on conditions related to what you need to find.

You can filter the Performance list by the following.

Component	Description
Name	Textual search for any existing name of an object
Role	Empty – The object has no associated roles Not-Empty – The object has at least one associated role
Documents	Empty – The object has no written description Not-Empty – The object has a written description
Description	Empty – The object has no written description Not-Empty – The object has a written description
Type	Key Performance Indicator (KPI) Key Control Indicator (KCI) Key Risk Indicator (KRI) Objective
Color	Green Yellow Red
Modified Date	The specific dates that things have been modified by
Status	Shows the status of the item in question (published vs in-progress)

The Filtering section will cover the following:

1. How to Add Filters
2. How to Remove Filters
3. How to Combine Filters

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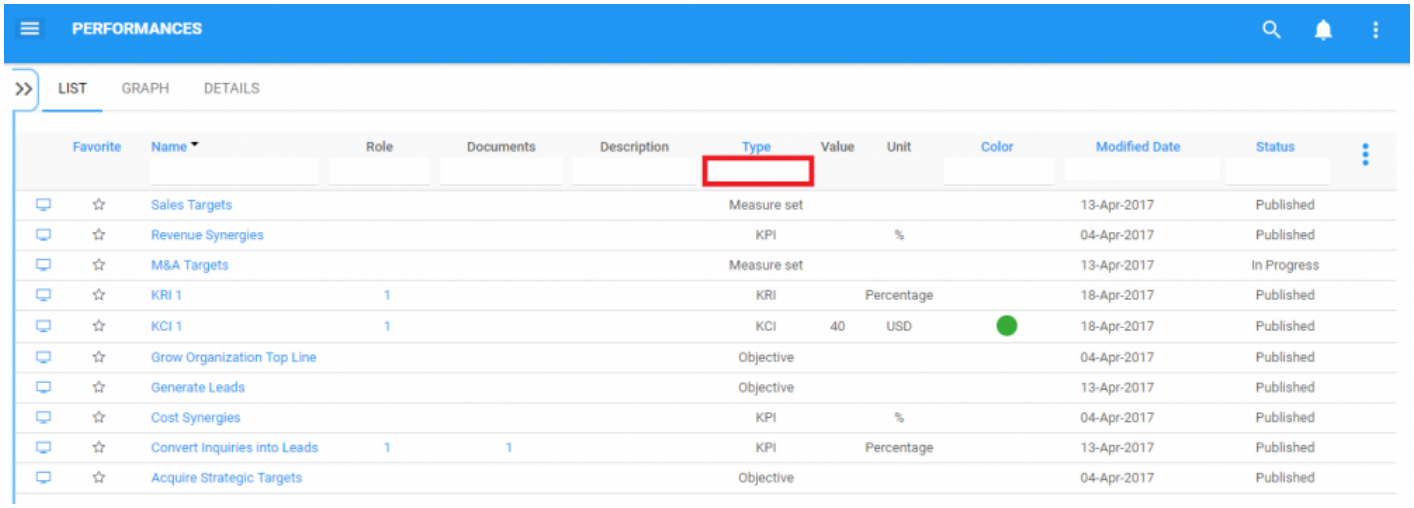
4.5.2.2.1 Add Filter

You can add filters to see performance measures and other specific objects of your choice. **Type** what you are looking for, **select** the filter in the drop-down menu, or **define the range of dates**.

How to Add Filter

1. Navigate cursor and select the box column you wish to filter. For this example, we will use **Type**



2. Select the box, which will generate a drop down menu

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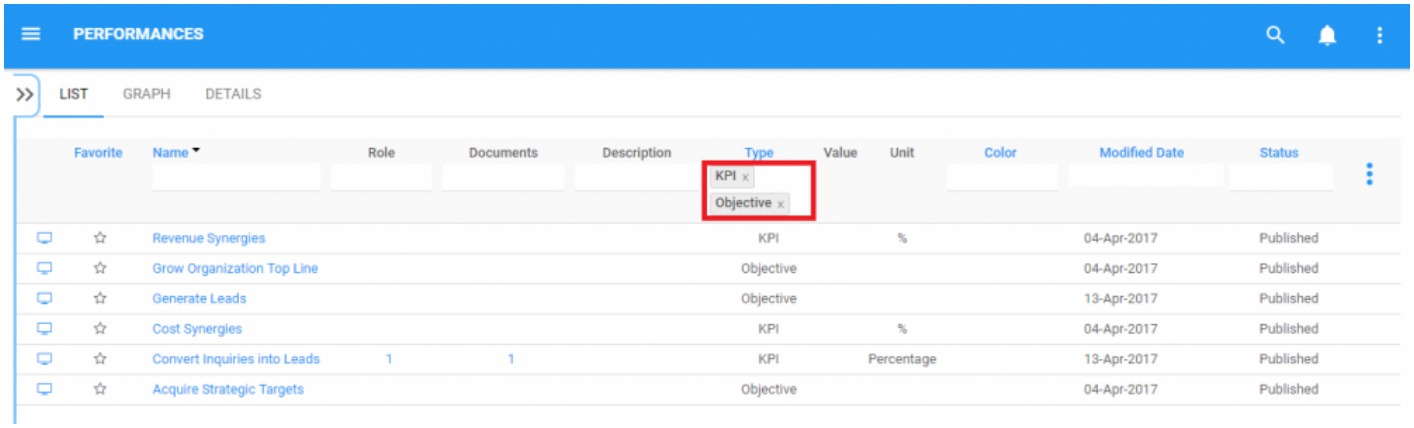
3. Select the desired filter. For this example, we will select KPI and Objective.



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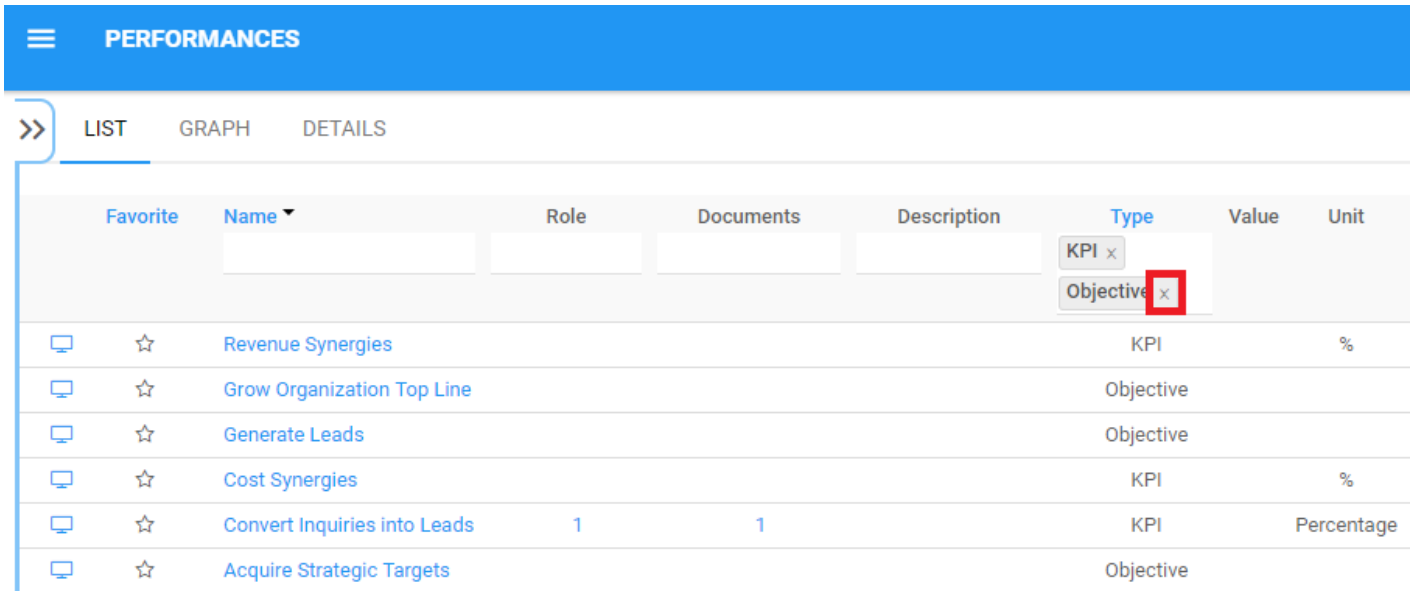
4.5.2.2.2 Remove Filter

You can remove filters; this will naturally increase the results in your list. See below to know how to add filters.

How to Remove Filter

To do so, click on the button beside the filter name.



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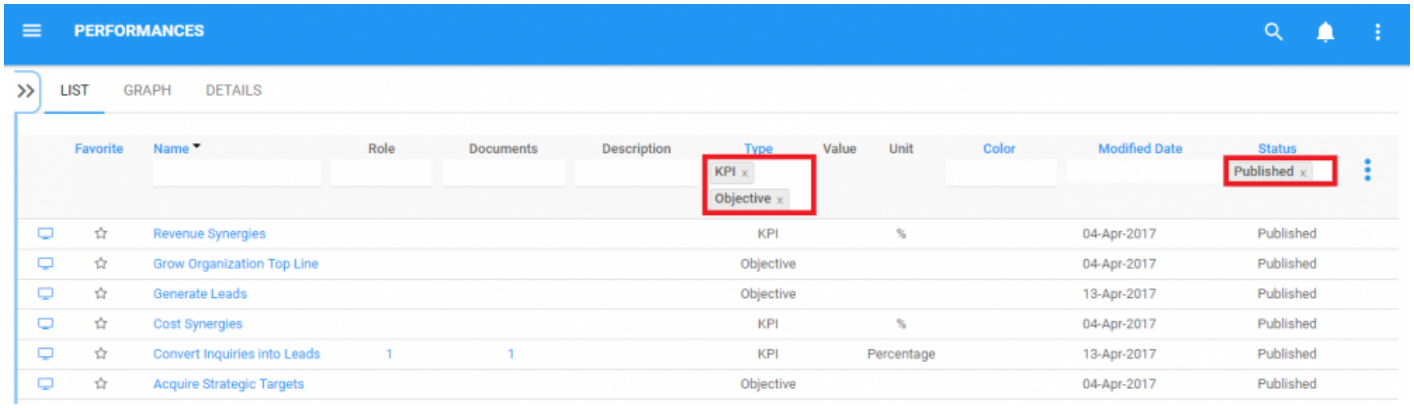
4.5.2.2.3 Combine Filter

You can combine filters, meaning you can add any other column filter to isolate results. See above to see how to **add** filters.

Example: The list is filtered by a combination of filters on each column.



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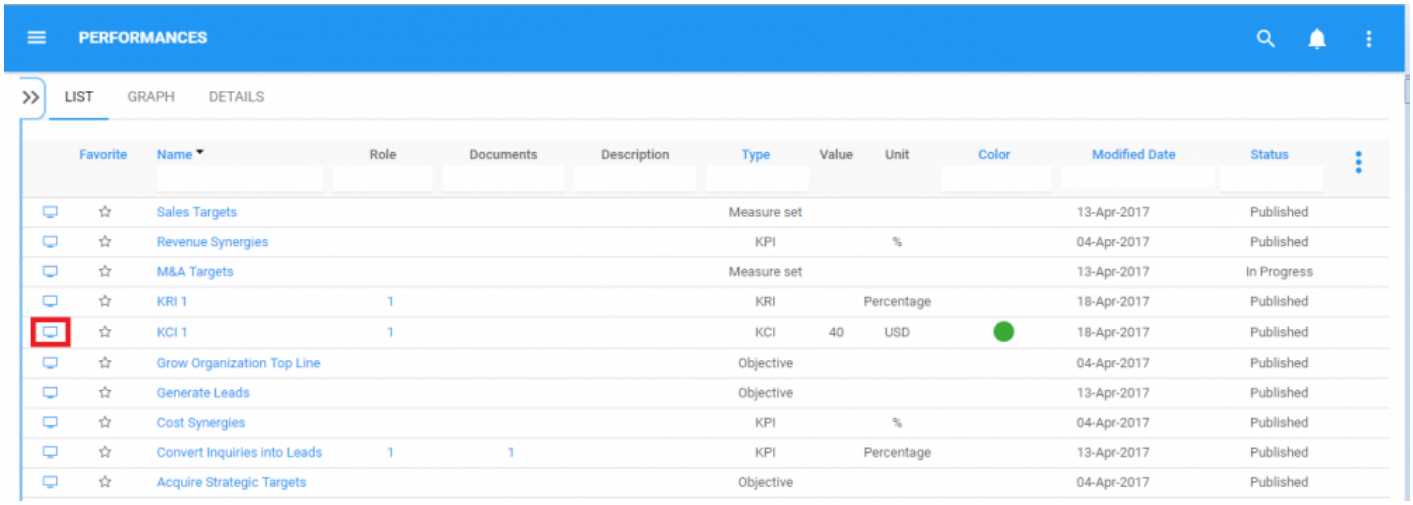
4.5.2.3 Quick Graph View

Quick Graph View is a feature of the EPC Web App that allows users to immediately view a graph associated with a Performance Meausure or objective. While Graphs will be further explained below, the Quick Graph View allows users to quickly navigate to a Graph from “List View”.

Please see the instructions below:

1. Navigate to Performance Module

2. Once in List View, click on the button in the left hand column of the performance measure you’d like to see in Graph View.



3. You will be redirected to the “Hierarchy Graph” page of the selected object

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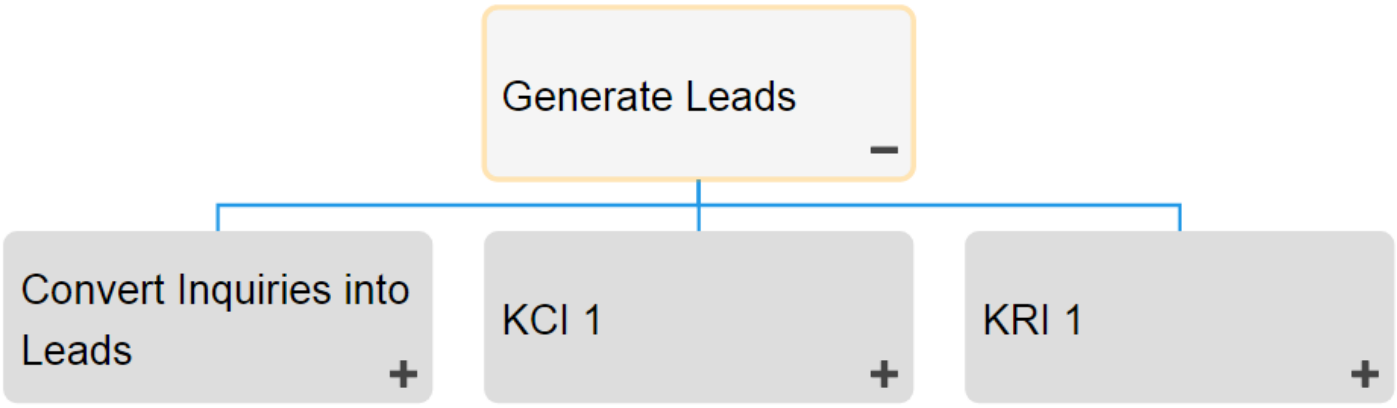

Please see Graph section below for further details on Graph navigation, viewing and customization.

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4.5.3 Graph

Graphs are used as a visual representation of Performance Measures. Graphs allow organizations and users to map out their Performance Measures and provide key stakeholders with Performance-specific information. They provide users with a high-level overview of Performance, the associated roles, resources and key materials and documentation.

The following will be covered in the Graph section:

1. **Graph Navigation**
2. **Graph Types (Impact, Hierarchy, Overview)**

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4.5.3.1 Graph Navigation

Understanding how to navigate to graphs and how to navigate within graphs allows users to fully utilize the EPC. Users can navigate to Graph View by using the “Quick Graph View” icon , or by manually navigating to Graph View.

This section will outline Manual Navigation, please see “Quick Graph View section above for alternative navigation options.

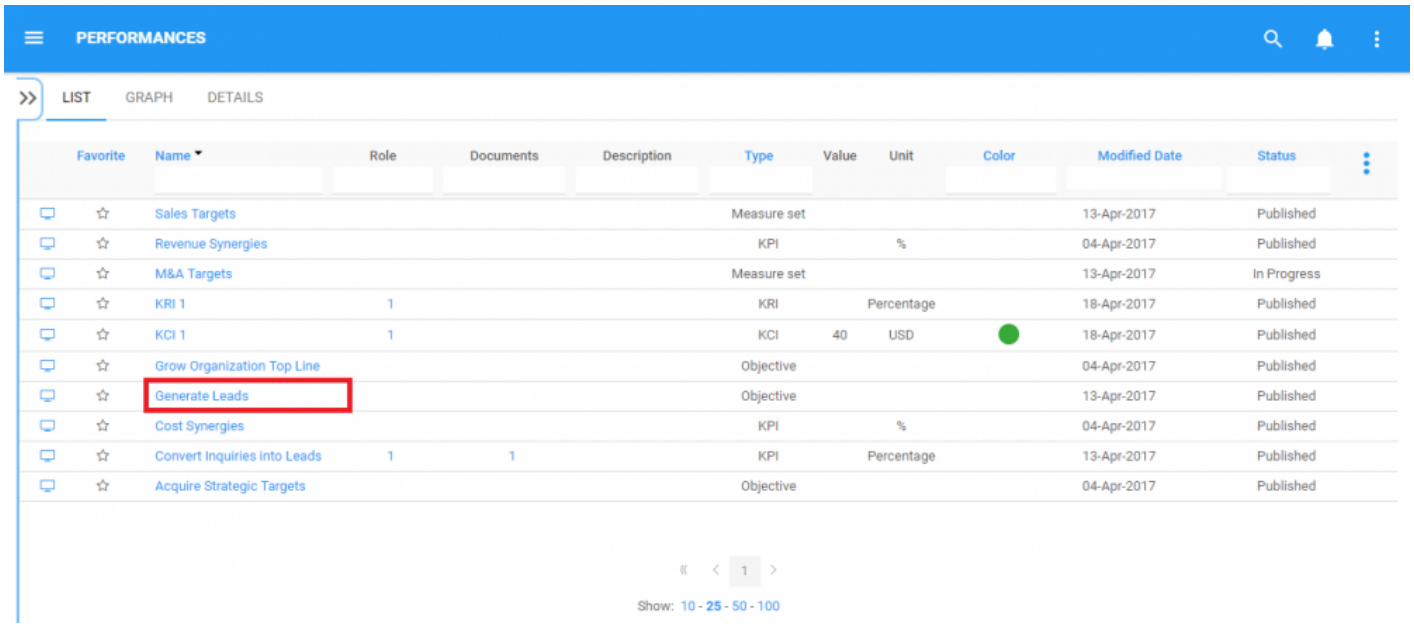
How to navigate to the Graph section (Manual Navigation)

1. Click on the **Navigation Menu Button** on the top left of your screen.

2. Click on **Performance**

3. By default, you will be directed to **List View** in the Performance module.

4. Select any item on the list by clicking on the desired line of the item



5. You will be prompted to the item’s details page

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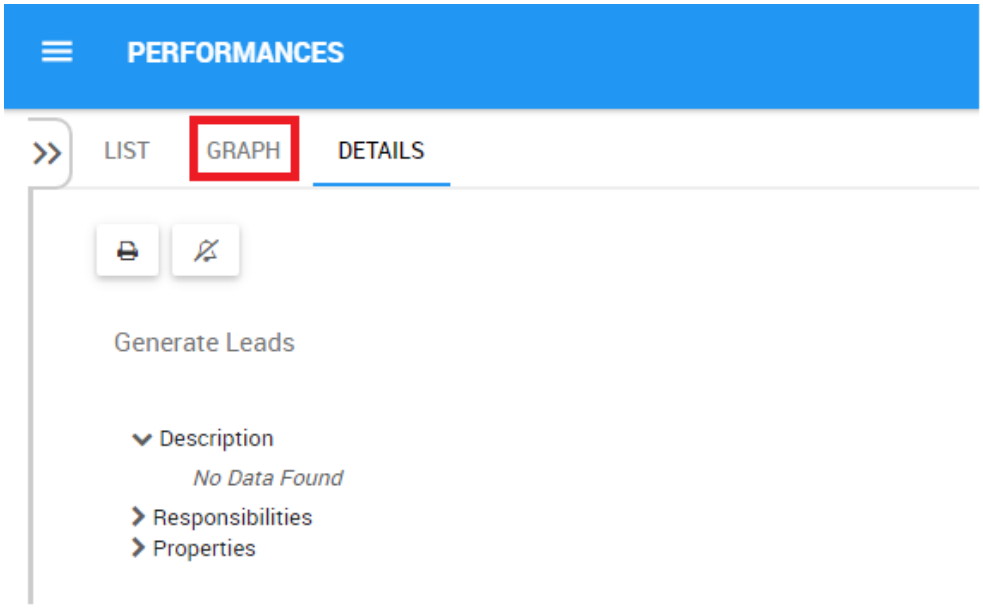
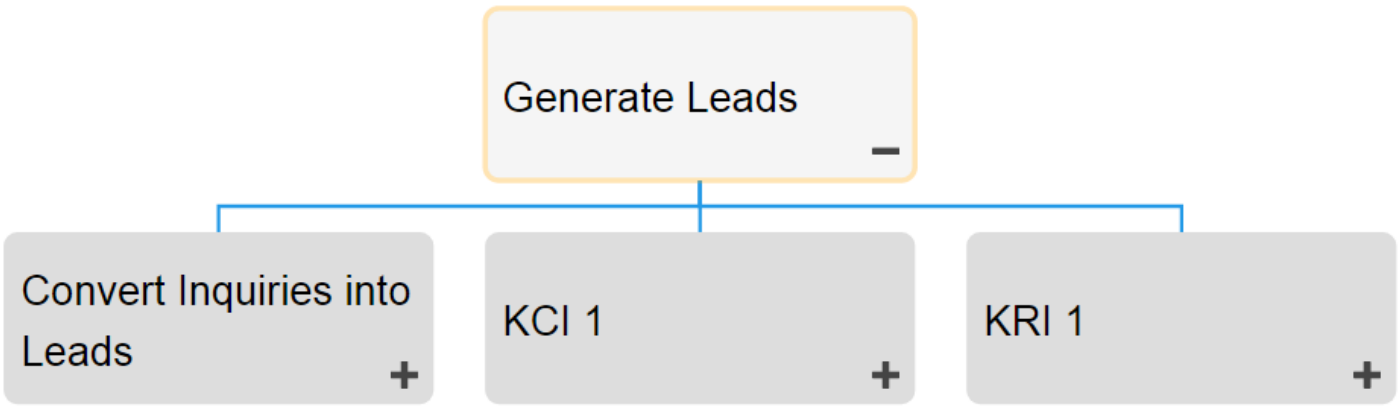
6. Select the “Graph” tab on the upper left corner of the page



7. You will be navigated to the Graph section. By default, users will be sent to Hierarchy view as the default Graph view. An example of this view can be seen below.



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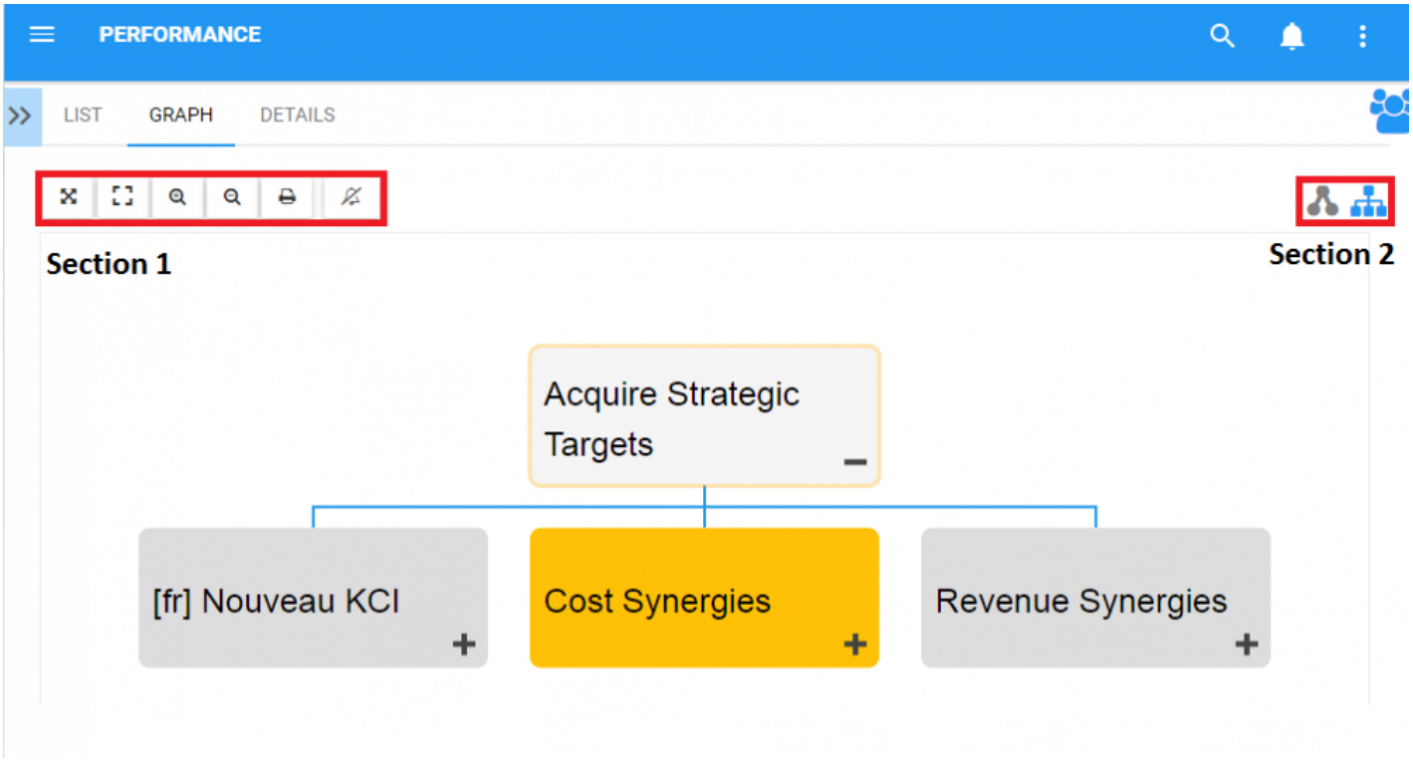
4.5.3.1.1 Navigating In Graphs

Navigation within the graph section is primary controlled by the toolbar at the top of the page. The toolbar is divided into 2 sections.



Section 1: items are focused on user viewing and graph functionality. Please see the table below for a full list and description of each item.

Item	Icon	Description
Fit Screen		This button will center the selected Performance Measure on the users screen
Full Screen		This button will enlarge the item and fit a large-scale view to the users screen
Zoom In		This button will allow a user to zoom in to better view an item or item
Zoom Out		This button will allow a user to zoom out to better view an item or item
Print		This button will allow a user to print the graph being viewed

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Subscribe		This button will allow a user to subscribe to the performance measure being viewed. The icon will be displayed in white when a user is **not subscribed** to an item The icon will be displayed in blue when a user **is subscribed** to an item.

Section 2: items are focused on Graph selection. Please see the table below for a full list and description of each item.

Item	Icon	Description
Impact Graph		Graph showing downstream representation of associated items
Hierarchy Graph		Graph showing a top-down view of performance measures and how they fit within organizations
Overview Graph		Graph showing current performance comparative to listed performance measures

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4.5.3.1.1.1 Fit Screen

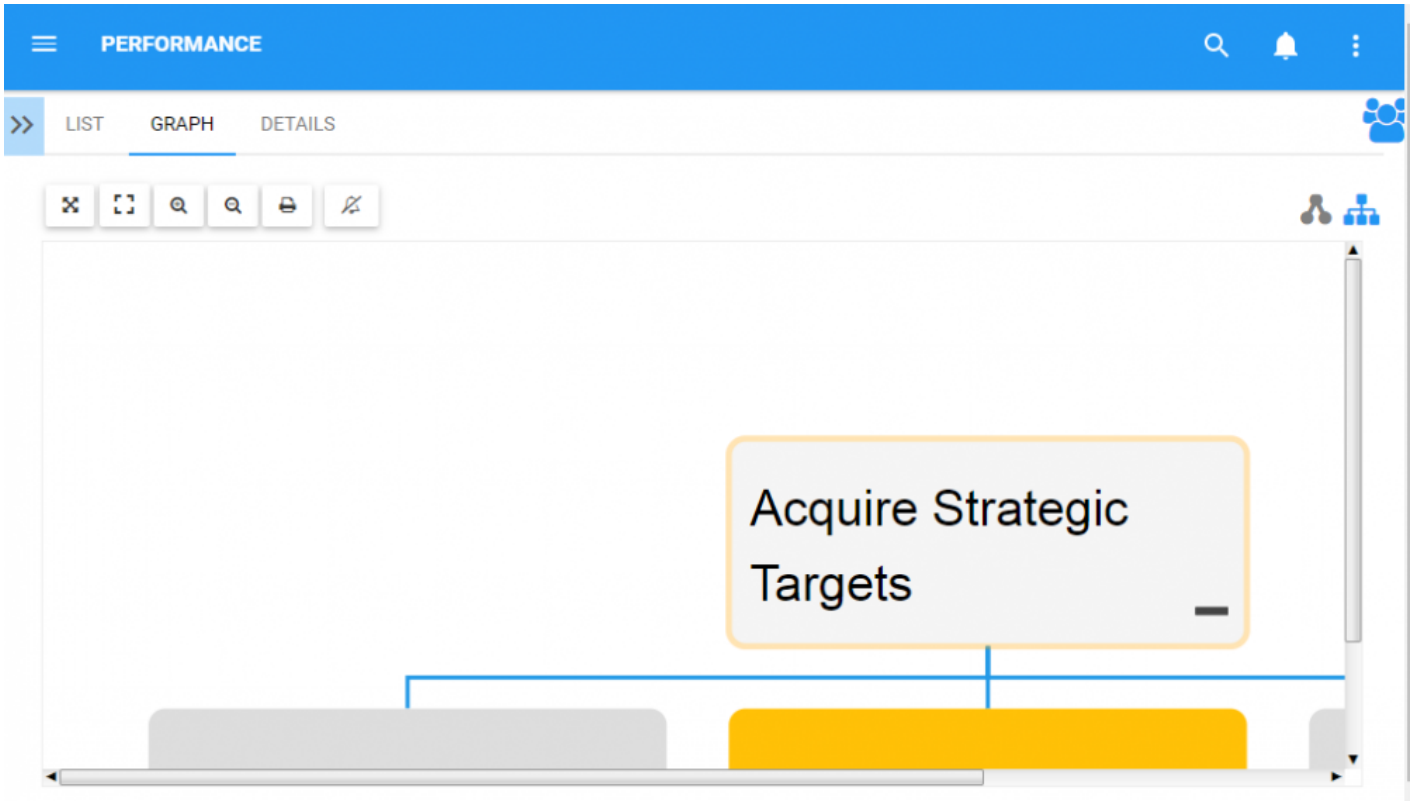
The fit screen function has been implemented to assist users at replacing and re-centering performance graphs.

To use the fit screen button, please see the following instructions.

1. Navigate to a Performance Measure within the Performance Module

2. Click on the Quick Graph View icon

3. Alter the Graph (Zoom in, out or shift). Please see zoom instructions below for further details.



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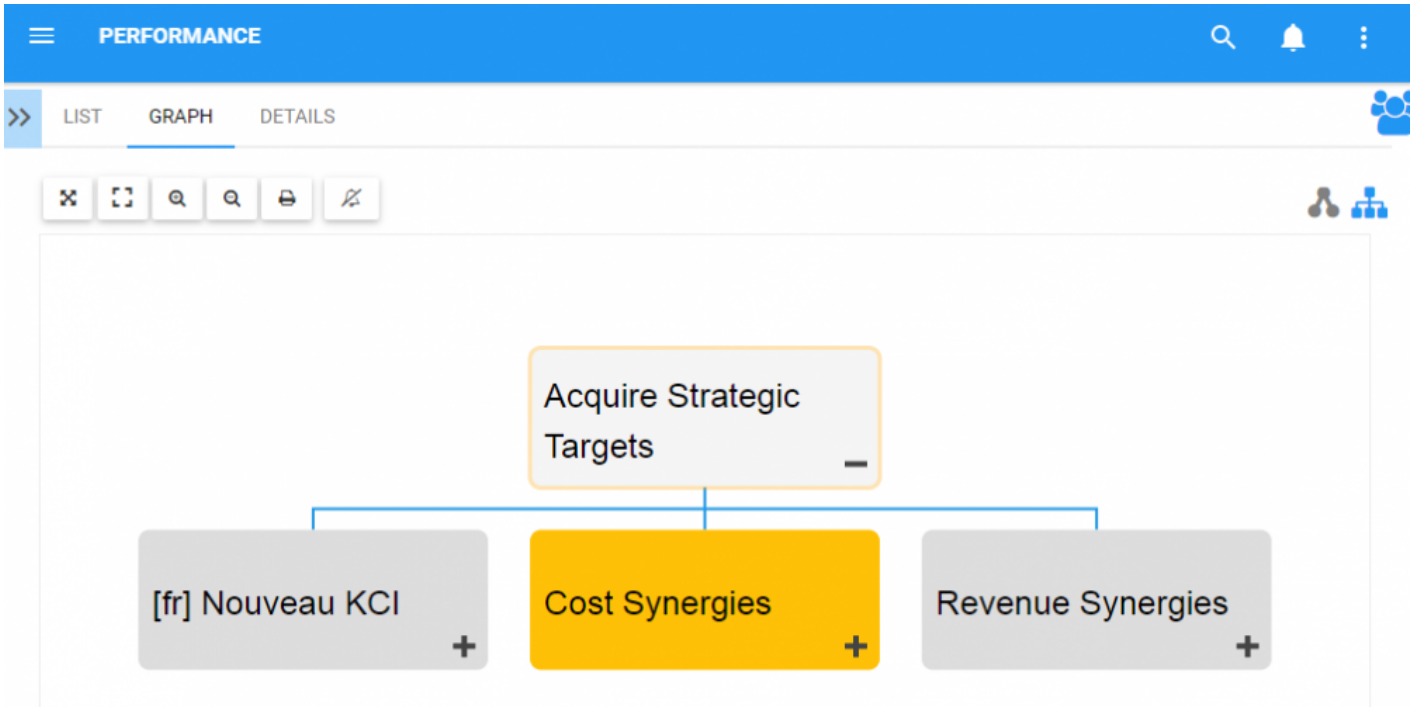
4. Click on button and the page will be reset



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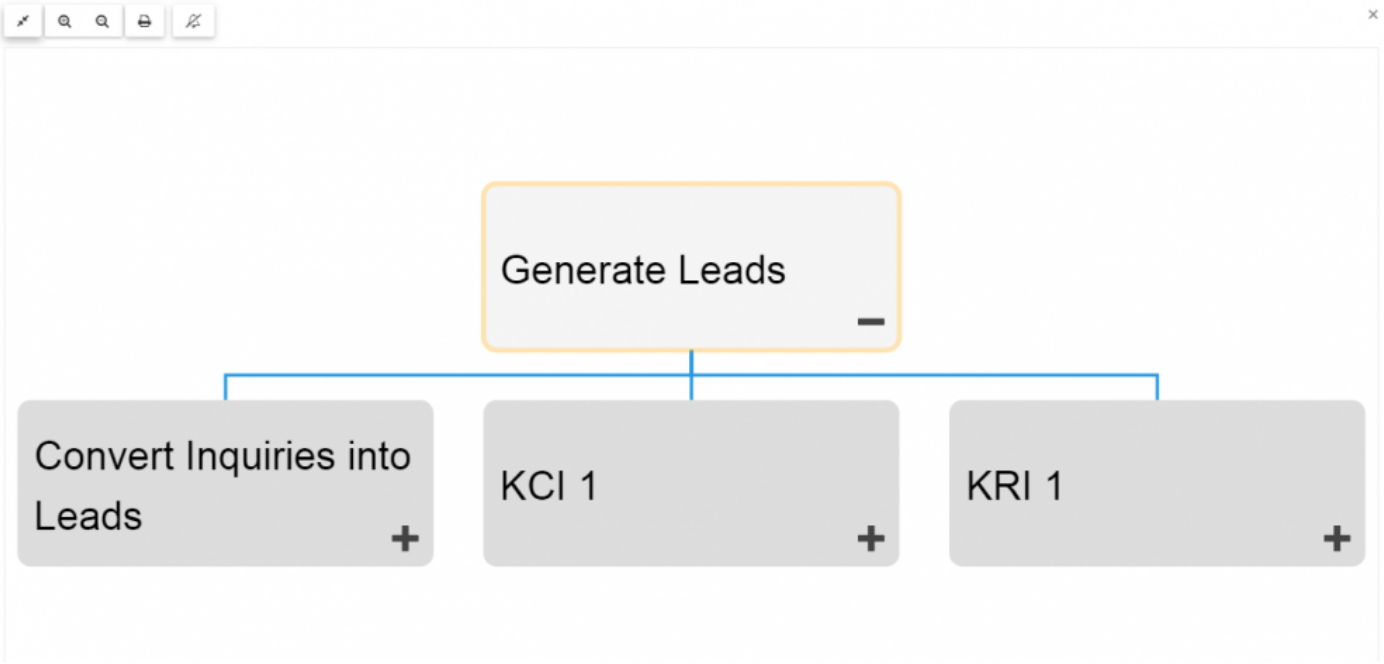
4.5.3.1.1.2 Full Screen

The fit screen function has been implemented to assist users at viewing Performance Measures, utilizing the full screen of a user.

To use the Full Screen button, please see the following instructions.

1. Navigate to a Performance Measure within the Performance Module
2. Click on the Quick Graph View icon
3. Click on button and the Graph will be set to “Full Screen View”



4. To close “Full Screen View” click on on the upper right corner

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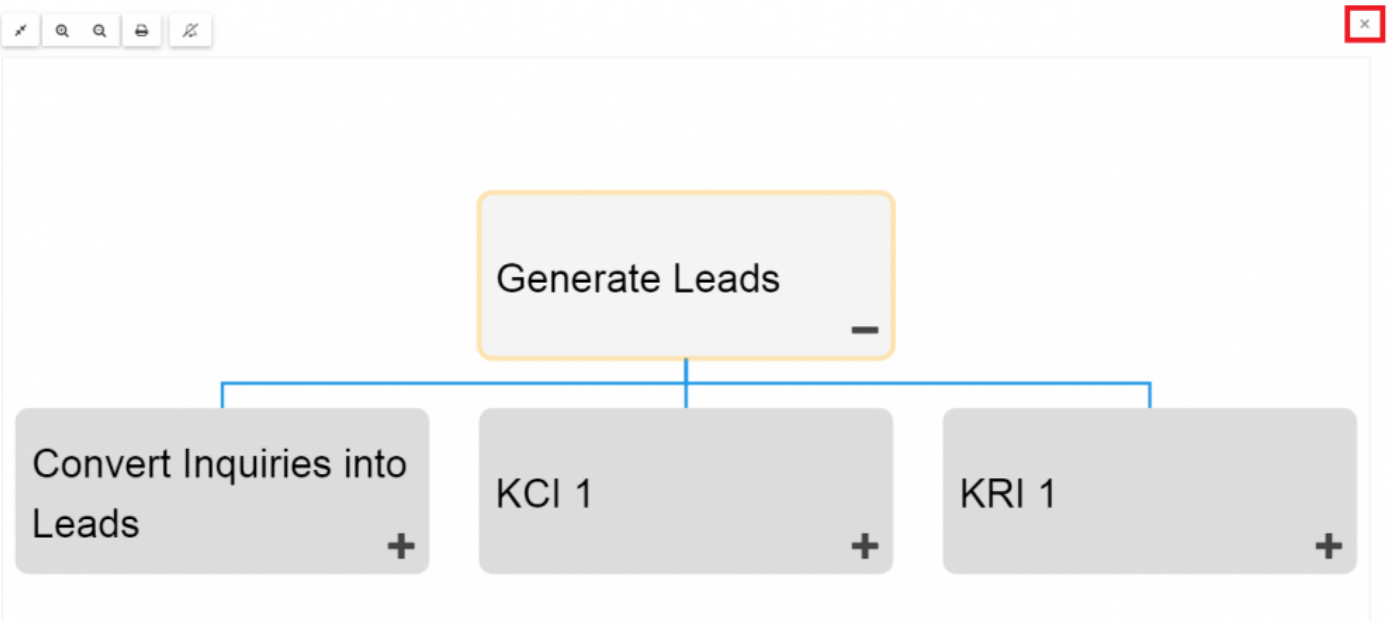

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4.5.3.1.1.3 Zoom In

The zoom function has been implemented to assist users in viewing specific items within selected Performance Measures.

To use the Zoom In button, please see the following instructions.

1. Navigate to a Performance Measure within the Performance Module
2. Click on the Quick Graph View icon
3. Select the Zoom in button
4. Repeat step 3 until reaching the desired Zoom

> Users can also use their mouse wheel to zoom in and out

> Users can zoom in or out on mobile devices with the use of 2 fingers.
> Zooming In: Place two fingers on the screen and drag them in opposite directions until desired zoom is reached.

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4.5.3.1.1.4 Zoom Out

The zoom function has been implemented to assist users in viewing specific items within selected Performance Measures.

1. Navigate to a Performance Measure within the Performance Module
2. Click on the Quick Graph View icon
3. Select the Zoom in button
4. Repeat step 3 until reaching the desired Zoom

> Users can also use their mouse wheel to zoom in and out

> Users can zoom in or out on mobile devices with the use of 2 fingers.
> Zooming Out: Place two fingers on the screen and drag them towards each other until desired zoom is reached.

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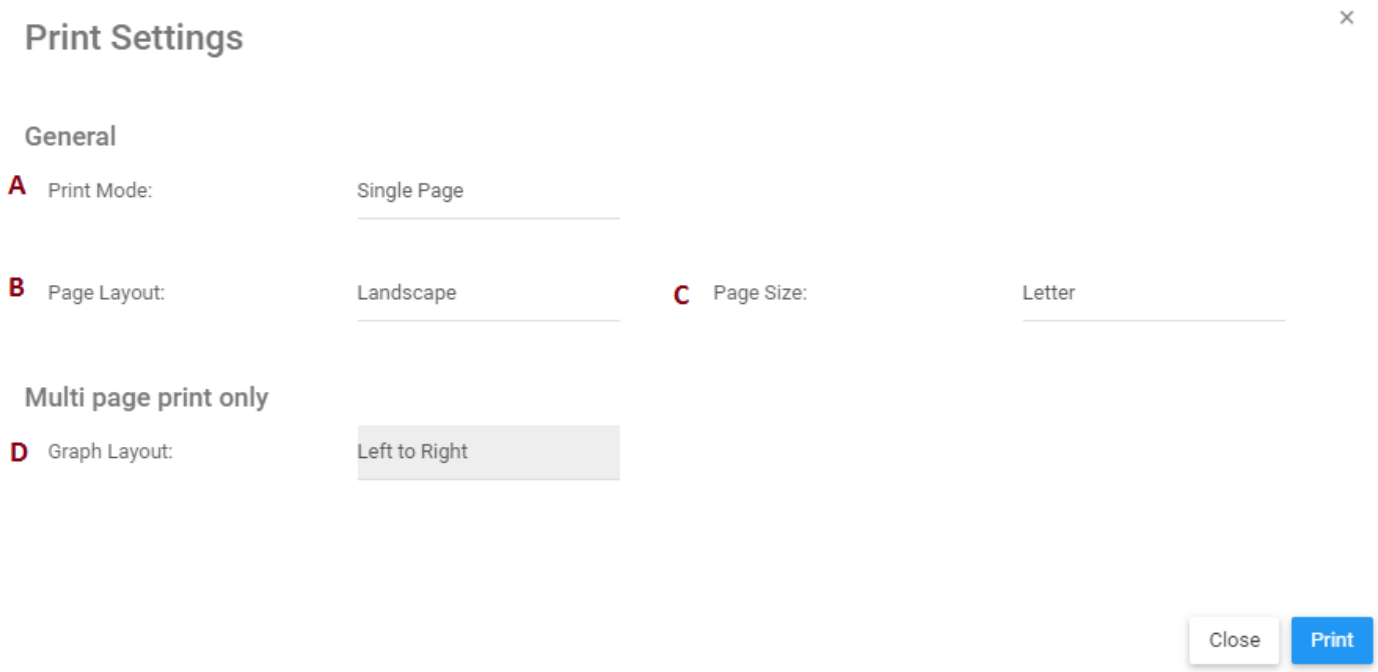
4.5.3.1.1.5 Print

The Print button has been added to allow users to easily print a desired graph.

To use the Print button, please see the following instructions.

1. Navigate to a Performance Measure within the Performance Module
2. Click on the Quick Graph View icon
3. Select Print button at the upper left corner of the page
4. A print settings menu will be generated on the user's screen



Setting	Options	Description
A – Print Mode	a. Single Page b. Multi Page	Fit the displayed content over a single page Spread the displayed content over multiple pages
B – Print Layout	a. Landscape b. Portrait	Landscape ("Sideways") page orientation Portrait ("Top-Down") page orientation
C – Page Size	a. Letter b. Legal	8.5 × 11.0 in 8.5 × 14.0 in

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	c. A3 d. A4	30 × 42 cm 21 × 30 cm
D – Graph layout	a. Left to Right b. Top to Bottom	Sideways layout of graphic being printed (multipage) Top-down layout of graphic being printed (multipage)

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4.5.3.1.1.6 Subscribe

The subscribe function, symbolized by the icon, has been added to allow users to track items, objects and processes in the EPC. Users can subscribe to specific items or processes to simplify and centralize monitoring activities. By subscribing to items, users will receive notifications when items or processes are altered or optimized. Additionally, item subscriptions is a useful filter and option for Home page Widgets, allowing users to create Widgets specifically featuring items they deem as critical to their individual jobs.

The subscribe button can be found on all item pages, in both Graph and Details sections.

To use the Subscribe button, please see the following instructions.

1. Navigate to a Performance Measure within the Performance Module
2. Click on the Quick Graph View icon
3. Select Subscribe button at the upper left corner of the page
4. The button will change color to , symbolizing that a user is now subscribed to the item in question.

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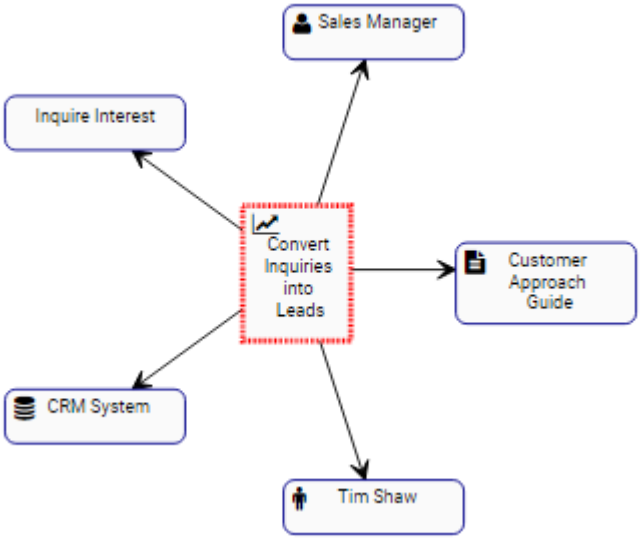
4.5.3.2 Impact Graph

Impact Graphs provide a visual representation of the upstream and downstream associations related to items in the EPC. In simple terms, Impact Graphs show users what items are associated to one another. Seeing the different associations within an organization allows users to better understand the complexity or certain business activities, as well as the true effect of changes within the organization.

Impact Graph



The example features the Impact Graph of the “Convert Inquiries into Leads” Performance Measure. The Performance Measure itself has a Document (Customer Approach Guide), a Role (Sales Manager) and Asset (CRM System) and Task (Interest Inquiry) associated with it. The specific nature of the items associated is denominated by the icon featured next to the name of the items.

The Graph provides an initial visual representation of items that **directly** impact one another. Users can additionally expand the Impact Graphs to view **indirect** associations.

Users can **double click** on specific items within the Impact Graphs, which will display the associations to that item.

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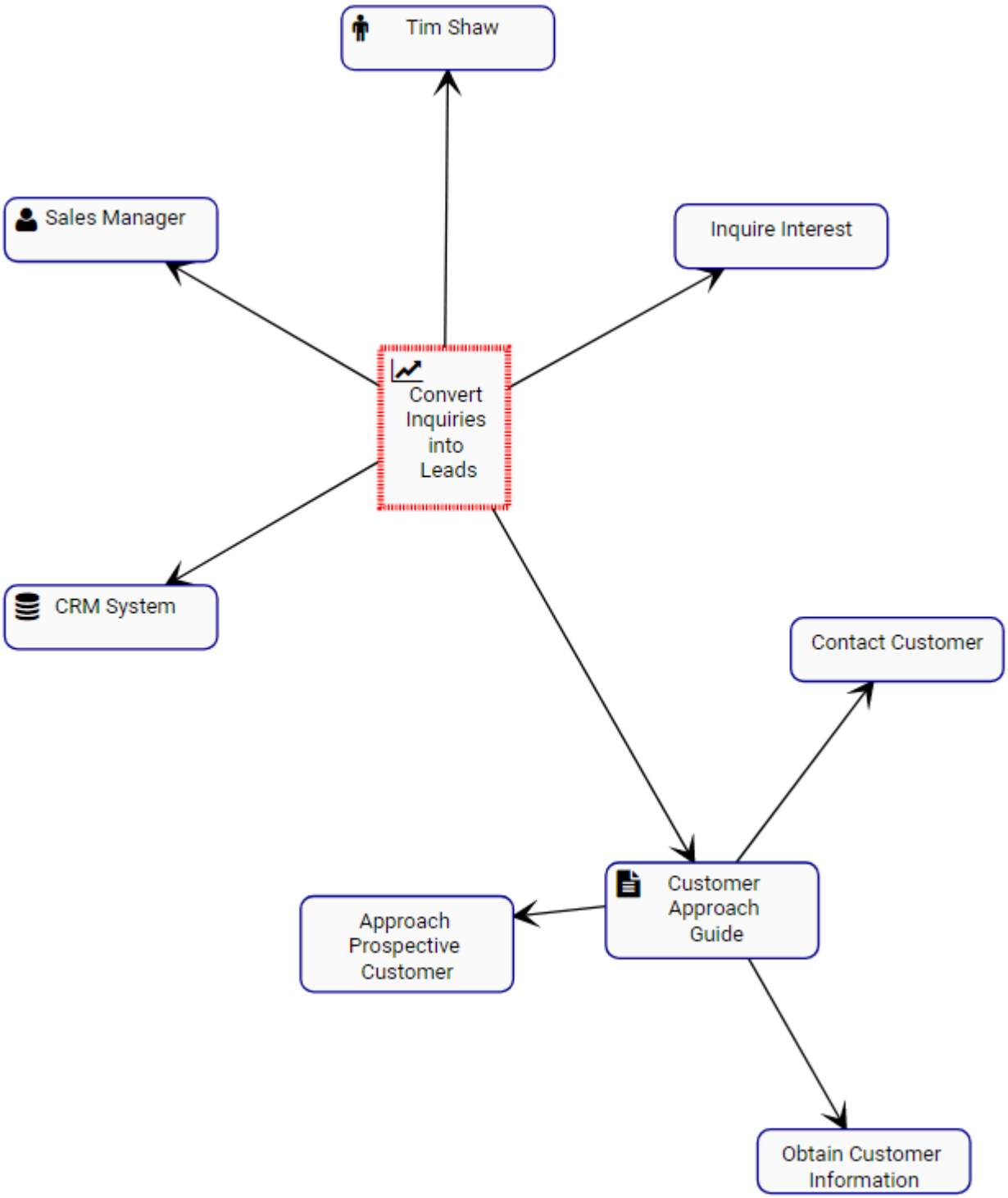

These Impact Graphs can be used to educate business users, to analyze internal business processes and help management optimize activities effectively. They provide management with a complete view of change impacts, enabling effecting change management planning.

Impact Graph Navigation

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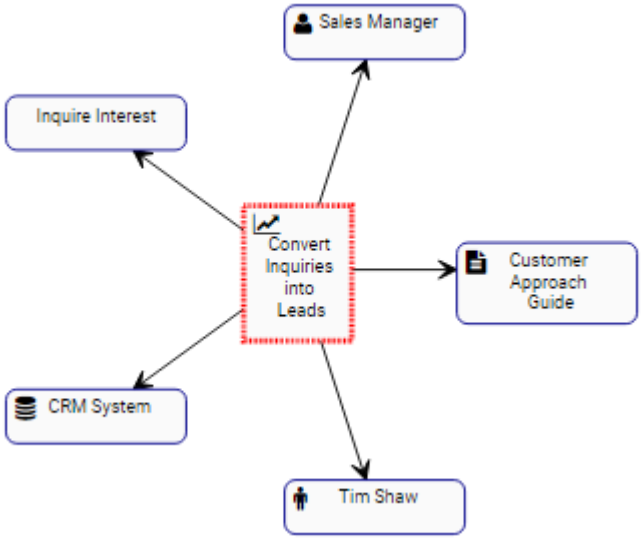
To navigate to Impact Graphs, please see the following instructions.

1. Navigate to a Performance Measure (KPI, KCI or KRI) within the Performance Module

2. Click on the “Quick Graph View” icon

3. By default, a user will be navigated to the Measures Hierarchy Graph. To view a specific item’s Impact Graph, a select the “Impact Graph” icon

4. You will be navigated to the specific item’s Impact Graph



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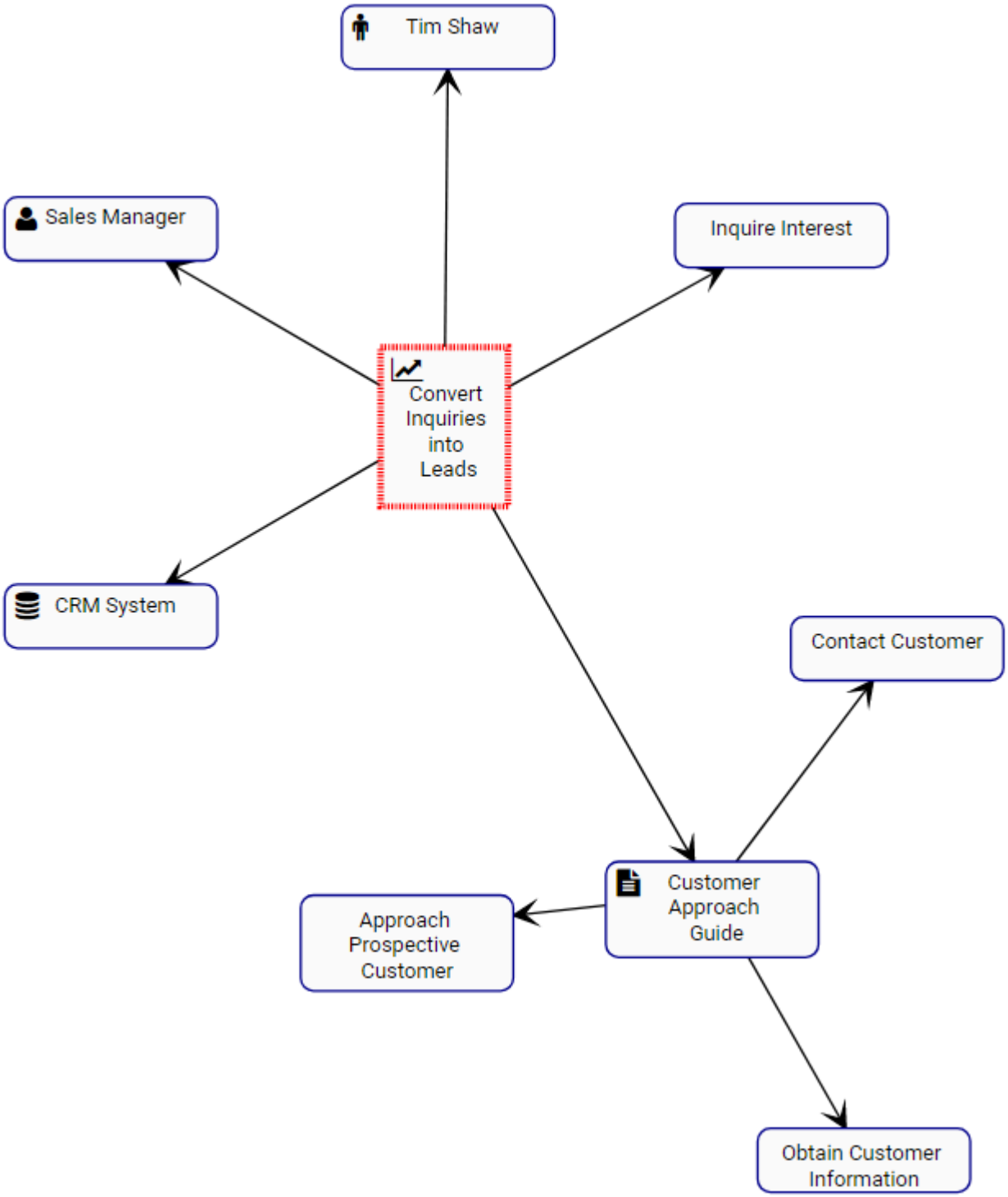
5. (Optional) To further expand the Impact Graph, simply double-click on the item to which you would like to display



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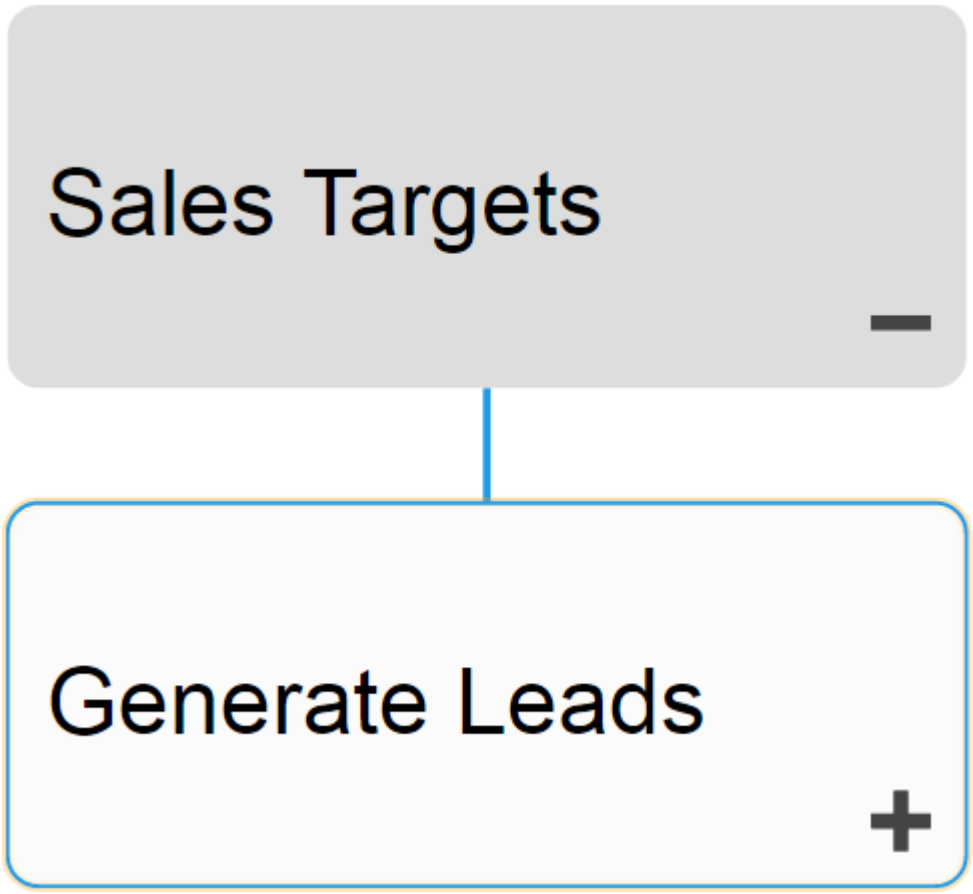
4.5.3.3 Hierarchy Graph

Hierarchy Graphs allows users to view the vertical and horizontal hierarchy of Objectives and Performance Measures. This view provides users with a graphical representation of where specific Performance Measures fit within the overall organization.

Hierarchy Graphs show users to see all business Objectives, KPIs, KCIS and KRIs, as well as where they fit within an organization. This allows organizational users to understand organizational activities and gauge complexity of business performance.



Users can expand and close item sets easily, allowing users to view a high-level organization structure, and expand sections they wish to gain further information on.

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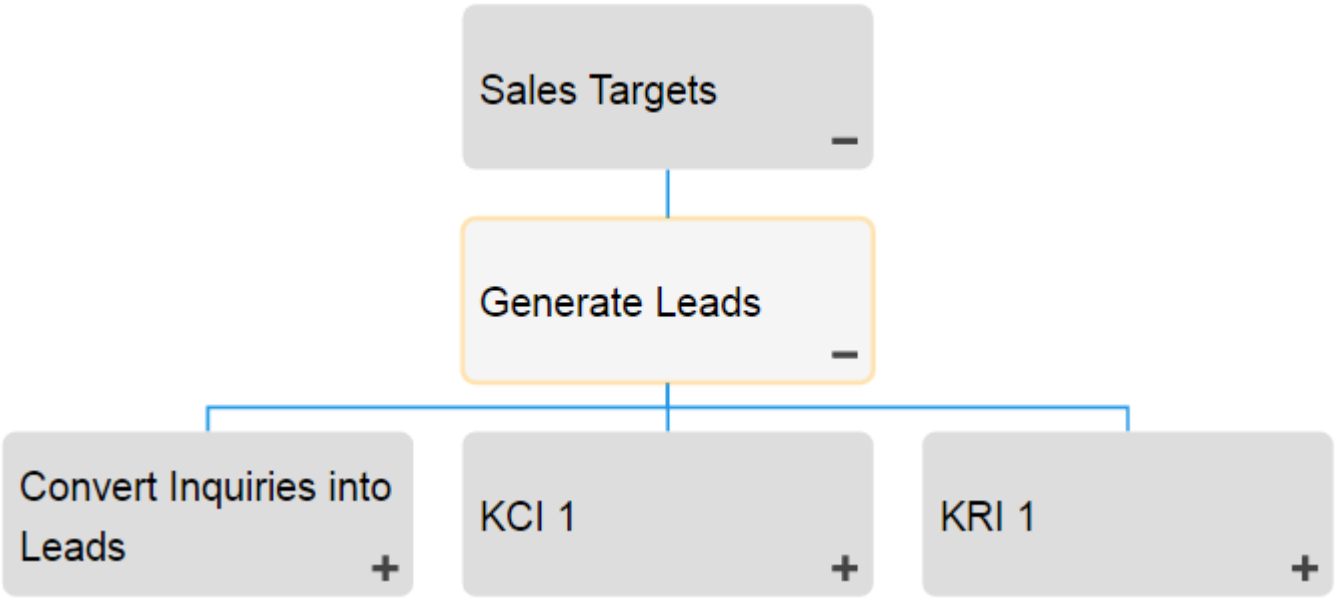

Hierarchy Graph Navigation

To navigate to Hierarchy Graphs, please see the following instructions.

1. Navigate to Performance

2. Select the item to which you would like to view.

> The further you navigate, the more you limit the scope of Hierarchy Graphs. To view a complete picture of organizational objectives, select items listed as “Objective” in List View

3. Select the “Quick Graph View” icon of the desired item

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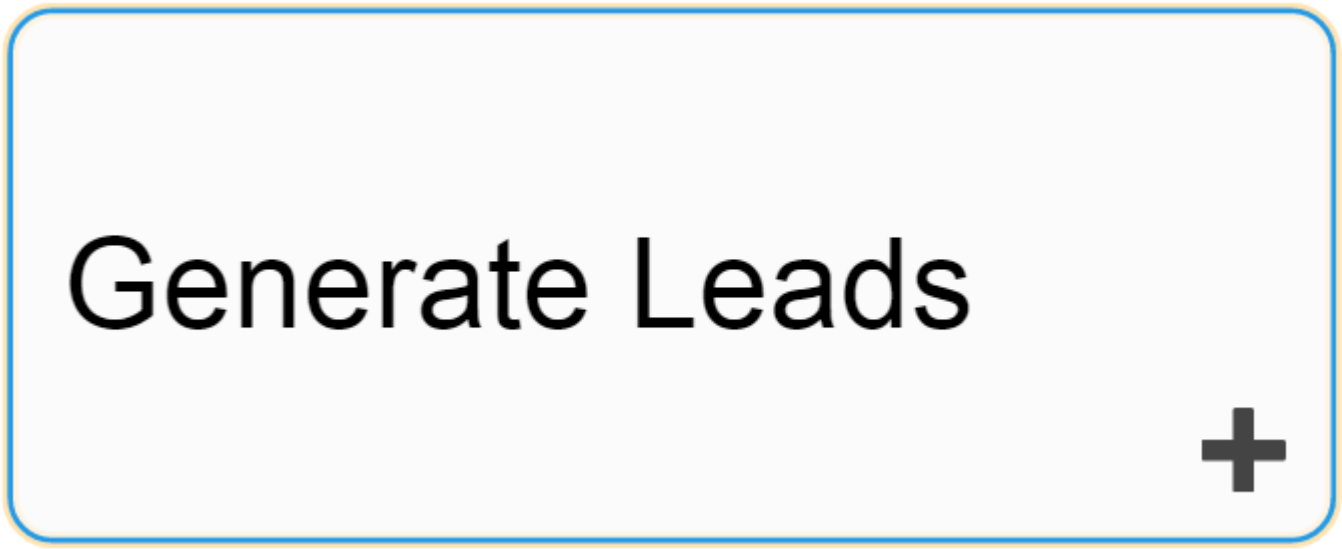
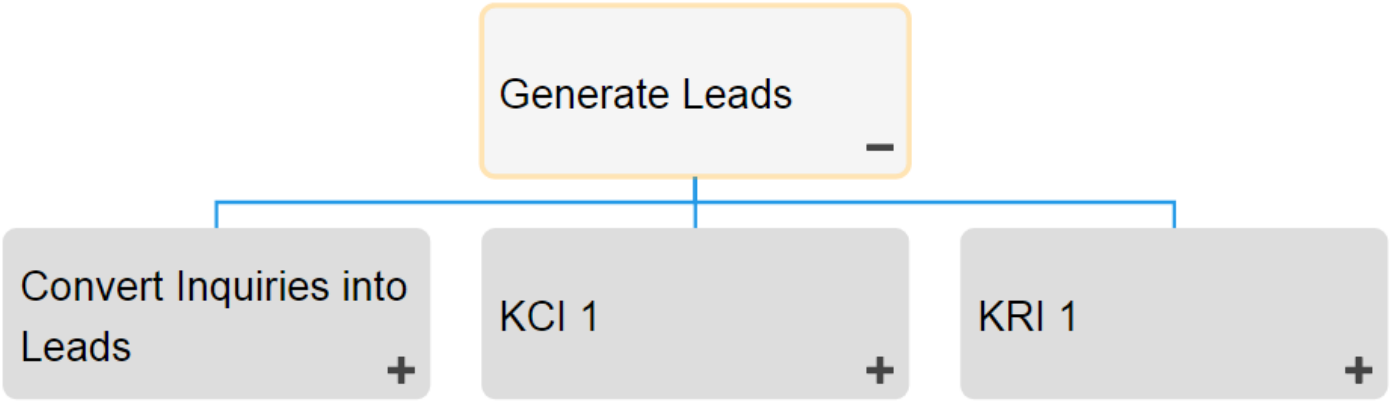
4. You will be navigated to the “Objectives” Hierarchy Graph. The entire set will not be fully displayed upon initial navigation and will display the individual item selected.



5. To further expand components of the Hierarchy Graph, double click on the on the objects in the Graph. This will expand the item selected.



6. Repeat step 5 until you reach the desired depth.

7. To close opened items, double-click on the icon

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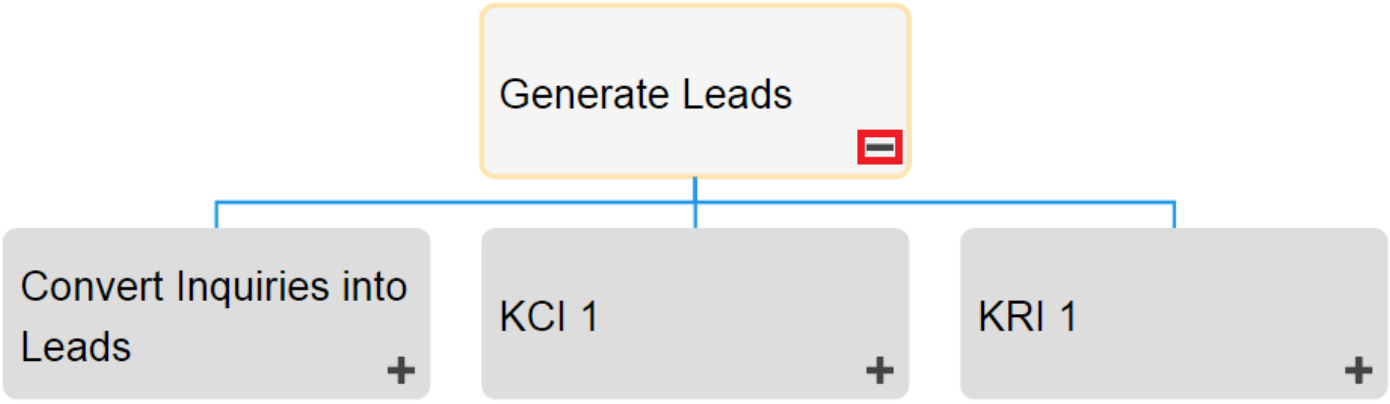

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4.5.3.4 Overview Graph

Overview Graphs allows users to view their current performance, respective to performance measures, and input data regarding their job responsibilities for superiors to view and track. This function allows users to view graphs reflecting past and current performance, allowing managers to understand and optimize the work being done.

Overview Graphs feature a variety of key information, highlighted below

Item	Name	Description
A	Unit	Displayed the specific unit by which the performance is being measured (e.g. $$, %, Unit, etc.)
B1 B2 B3	Current Performance	The reflection of the specific, current performance on the measure. It is reflected numerically in B1 and graphically in B2. B3 identifies the performance threshold used to gauge the performance as optimal (green), acceptable (yellow) or undesirable (red)
C	Add New Measure	This section allows users to input measures of to evaluate performance
D	List of Measures	A historical list of performance measures uploaded

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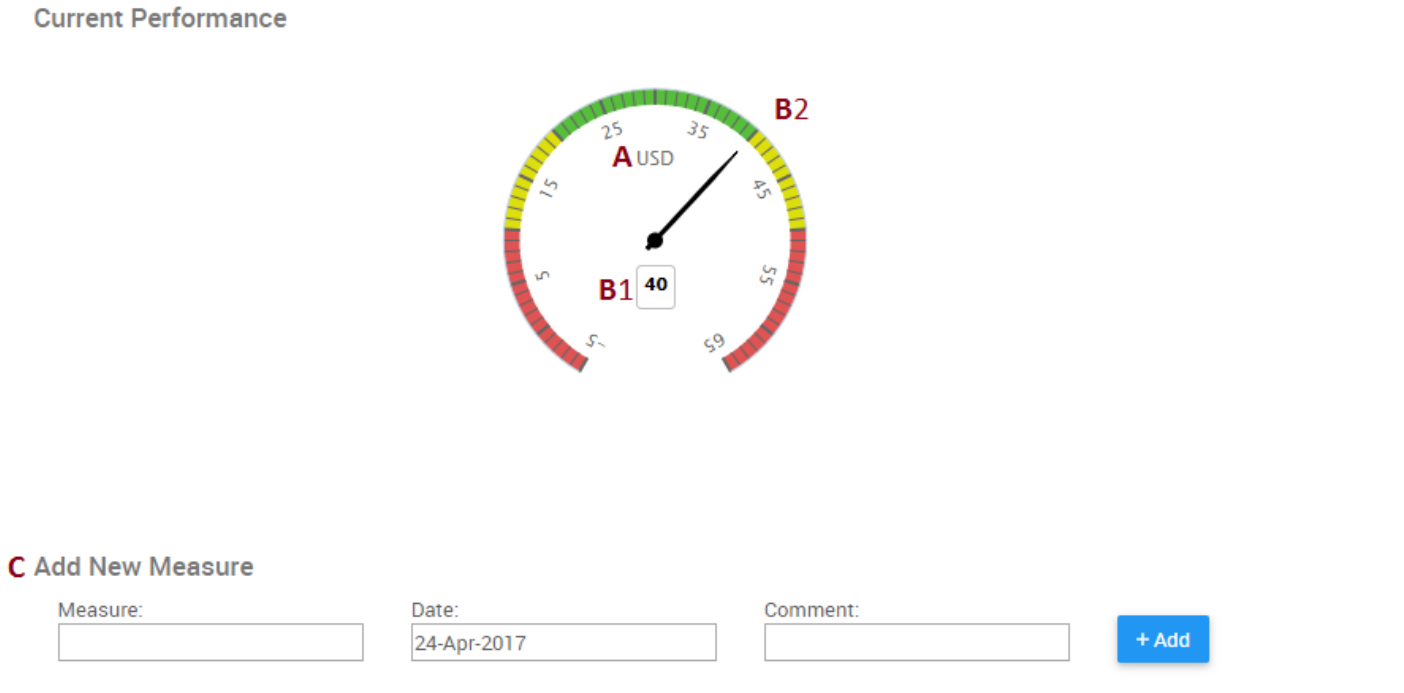

The overview graphs can be viewed in 2 contexts

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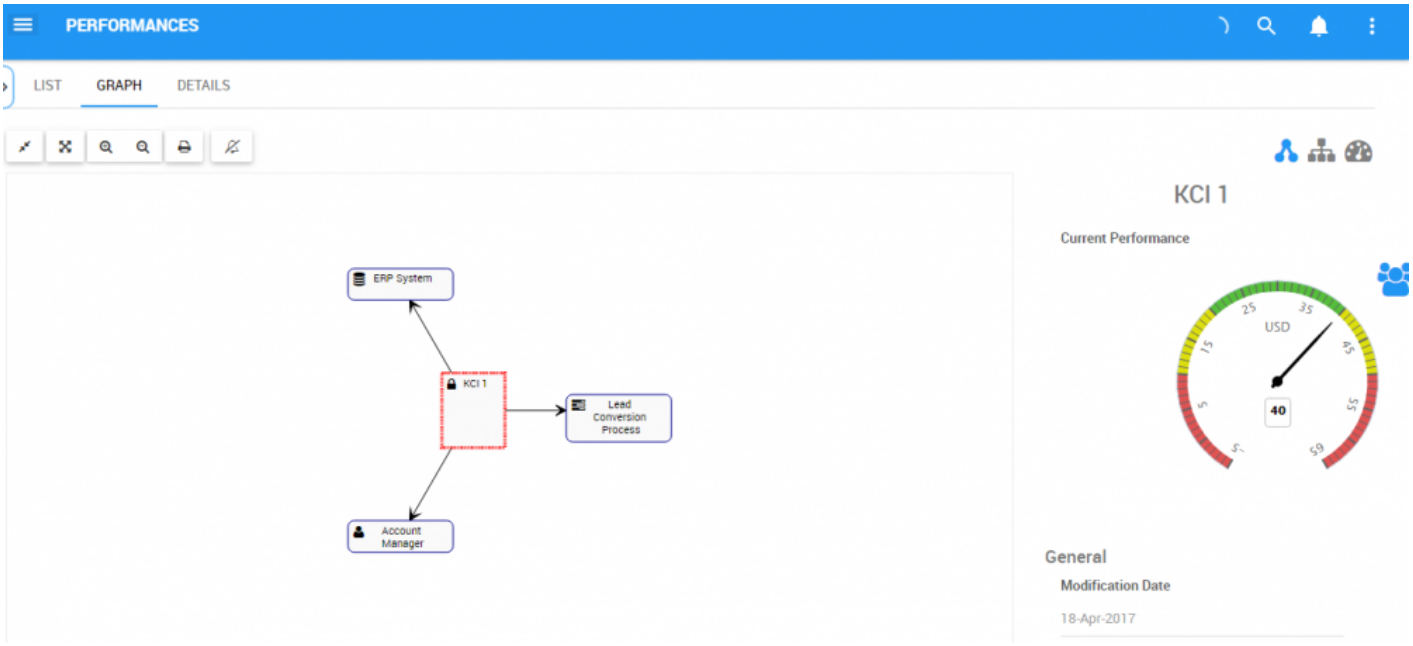
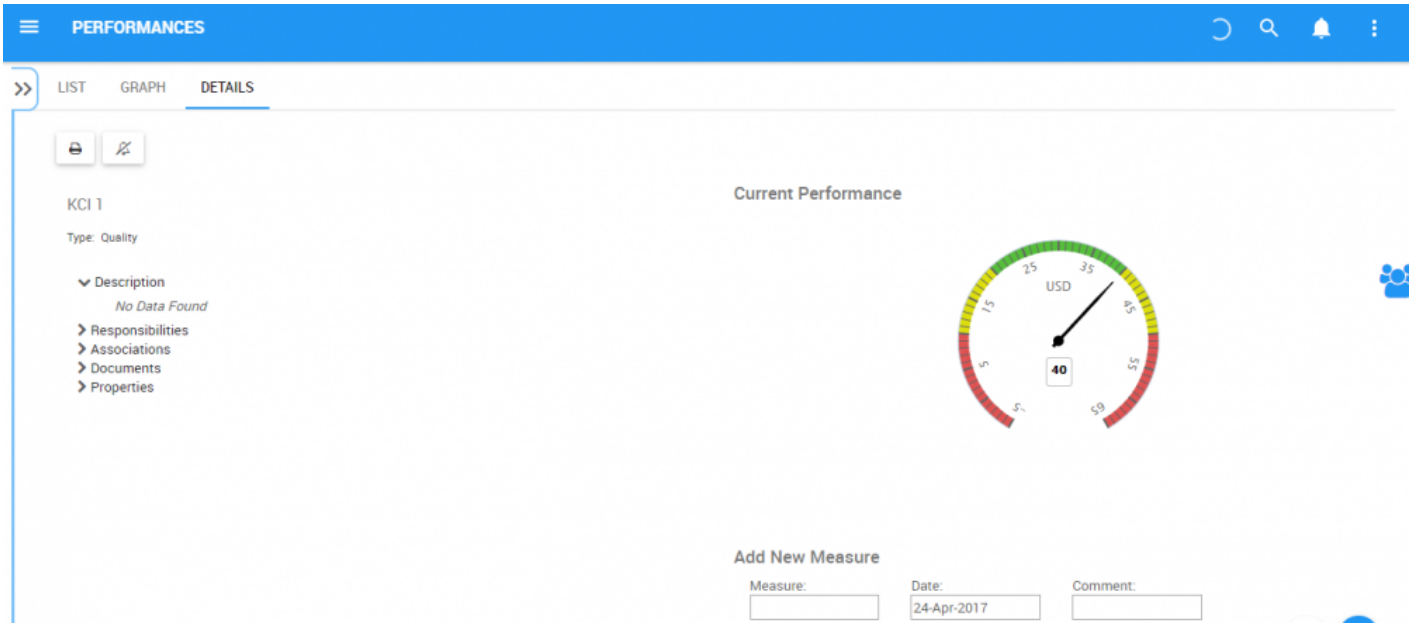
1. Adjacent to Impact & Hierarchy Graphs: Users can **view** the **latest** performance next to other graphs



2. On the details page: Allows user to **view** and **input** performance into graphs. For further details on inputting performance measure, please see the steps below.



4.5.3.4.1 Inputting Performance

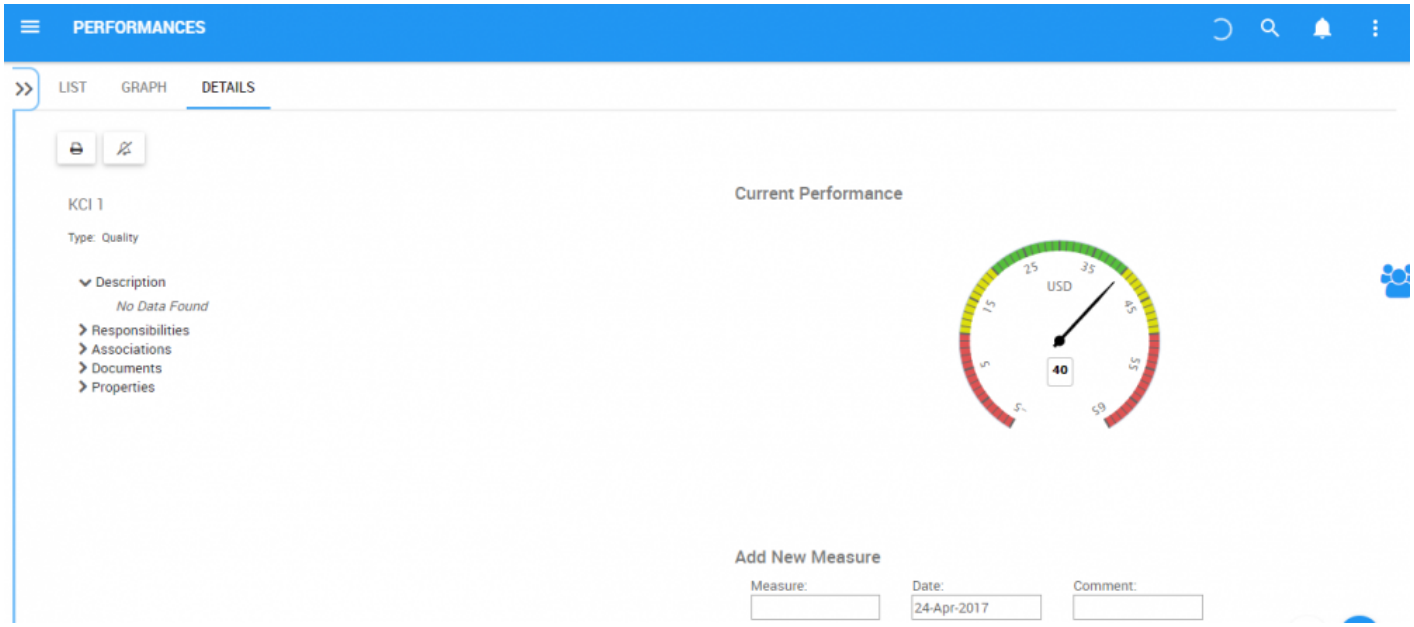
Users can input performance measure data. This provides users an outlet to report key metrics that in turn, can be monitored and tracked within the EPC. Uploading performance measures within the EPC allows managers to oversee performance specific information that can be corroborated with other sources.

Please see the steps below for further detail on inputting performance measure:

1. Navigate to a Performance Measure within the Performance Module

2. Navigate to the details page

3. You will be navigated to the following page



4. To input a performance measure, you will need to add the measure itself, the date performed and provide additional details in the comments section if required.

Measures can only report once per day and can only be added by users who are given "Write Access" by System Admins.

5. The performance measure will be added in the field below in the "List of Measures" with the **latest** measure being displayed in the graph above.

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4.5.4 Details

The Description section is where you will find details about the Objectives and Performance Measures you are observing. This rich text area allows for the display of all additional details that has been uploaded regarding the item in particular. These details provide users with all critical information about items that has been uploaded by EPC Modelers.

The details section is where users can see all information about items.

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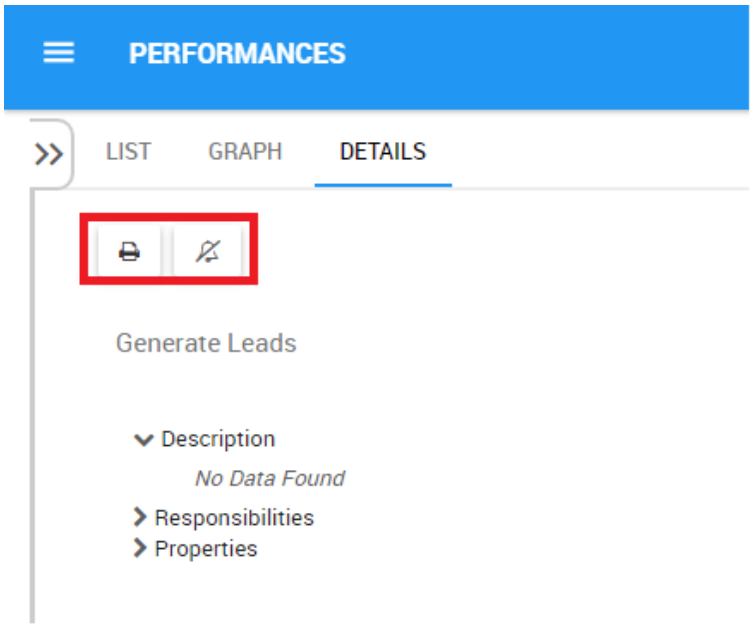
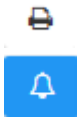
4.5.4.1 Toolbar

The toolbar provides users with a variety of functions to navigate and leverage the details page.



Item	Icon	Descriptions
Print		This button will allow a user to print the details page being viewed
Subscribe		This button will allow a user to subscribe to the performance measure being viewed. The icon will be displayed in white when a user is not subscribed to an item.

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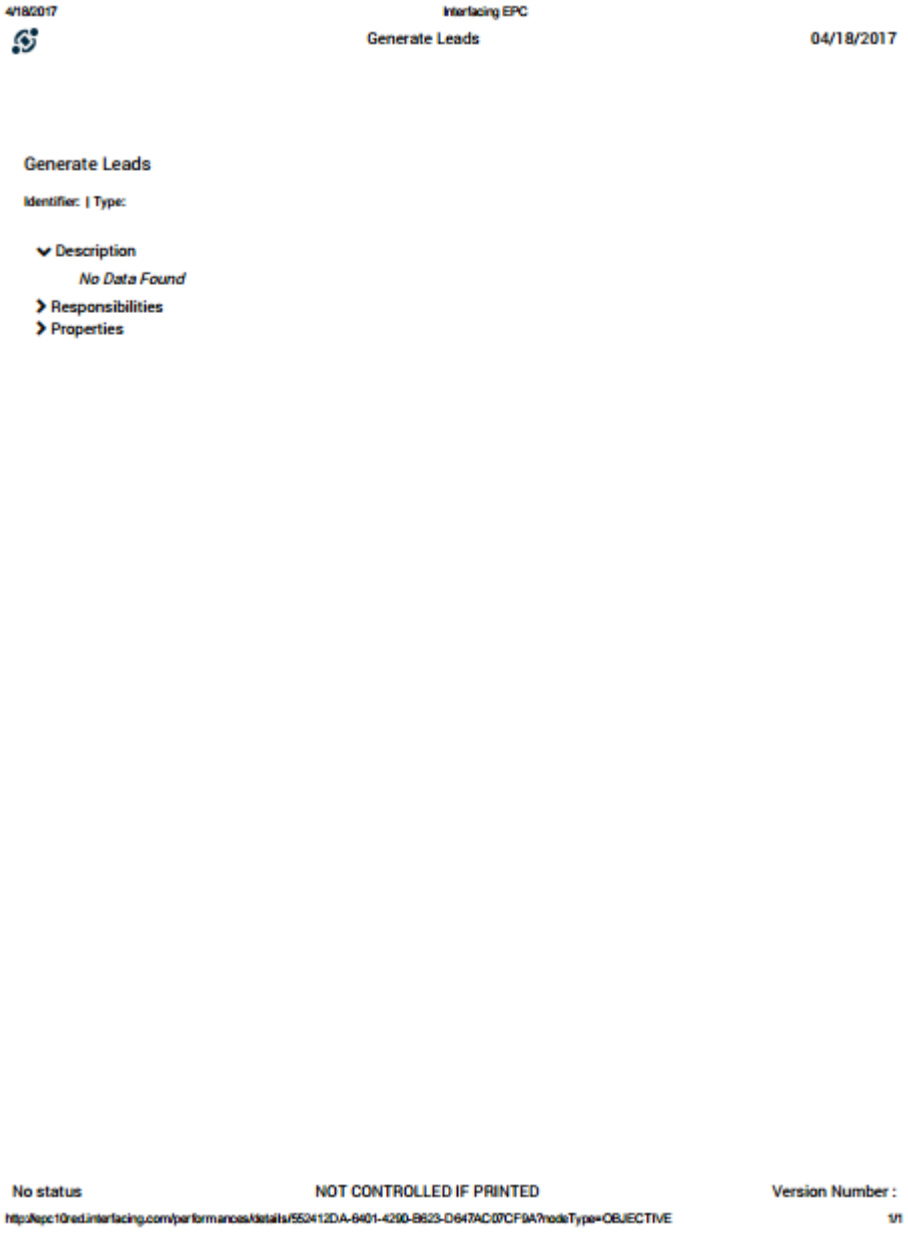
4.5.4.1.1 Print

The print button allows users to directly print the details page that they are currently viewing. Selecting the print function will automatically generate a formatted details page printout that a user can print directly.



4.5.4.1.2 Subscribe

The subscribe function, symbolized by the icon, has been added to allow users to track items, objects and processes in the EPC. Users can subscribe to specific items or processes to simplify and centralize monitoring activities. By subscribing to items, users will receive notifications when items or processes are altered or optimized. Additionally, item subscriptions is a useful filter and option for Home page Widgets, allowing users to create Widgets specifically featuring items they deem as critical to their individual jobs.

To use this function, simply click on the subscribe button, which will change from to .

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4.5.4.2 Attributes

Users can find a variety of information about objects and performance measures within the details section. This information allows users to fully understand all information about specific items, and provides users with a specific destination that can be used to see and gather all relevant information. Performance Details display the following content:

1. Description
2. Responsibilities
3. Associations
4. Documents
5. Properties

By default, the attributes within the Details module will be collapsed. Users can expand these attributes by:

3. Clicking on the › next to each item to expand individual attributes

4. Clicking on the icon at the bottom right corner of the page to expand all attributes

> Selecting different items may result in different information being displayed. The above components specifically relate to information that will be provides for objectives and performance measures. Note however that all relevant info for items will be displayed.

> The details page only populates details that are specific to each item. Users must navigate to the specific item they wish to retrieve information on to obtain full details.

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4.5.4.2.1 Description

The description section provides users with all details relating to what a performance measure is, as well as particular information that can assist with execution. This information, populated by EPC Modelers, will provide further details for users to.

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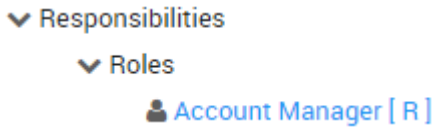
4.5.4.2.2 Responsibilities

The Responsibilities section displays de roles, resources and/or assets that are responsible for the performance measure you are viewing. This provides additional details about any associated object that has been tied to the item using the RASCI-VS matrix.

Users can navigate directly to the item pages that are featured in this section. Users can click on the specific item's name highlighted in blue. You will be redirected to the item's details page.



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4.5.4.2.3 Associations

The Associations section lists all of the Documents, Rules, Risks, Controls, Performances, Services, and Master Data that are assigned to the objective or performance measure. This allows users to quickly see what specific items have been tied to.

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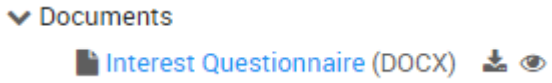
4.5.4.2.4 Documents

This section lists all documents that have tied to the item being viewed. This provides users with a list of relevant documents, as well at the ability to directly access these documents. Users are additionally provided details regarding the document type (docx, pptx, URL, xlsx, etc.)

Users are provided with a direct access link listed in blue. Clicking on the name will navigate a user to the documents details page.



1. **Preview**: To preview the document click on the icon. Please see list below for file types supported by Preview functions.

2. **Download**: To download the document click on the icon

PDF Files	Available with extension Adobe Acrobat	Available with extension Adobe Acrobat	Available with extension Adobe Acrobat	Available with extension Adobe Acrobat	Available with extension Adobe Acrobat
Image Files • Png • Jpeg, jpg • Gif • Svg, svgz • Tif, tiff • Wbmp • Webp	Available (all)	Available (all)	Available (all)	Available (all)	Available (all)

• Ico • Jng • bmp					
URLs	Available	Available	Available	Available	Available
File Links	Available with extension Local Links	Available with extension Local Filesystem Links	Available if Trusted Sites added*	Unavailable	Unavailable
MP3	Available	Available	Available	Available	Available
MP4	Available	Available	Available	Available	Available
Wav Files	Available	Available	Unavailable	Available	Available
Ogg Files	Available	Available	Unavailable	Available	Unavailable

For further detail on previewing documents, please see section 4.7.4.1.1.2 .

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4.5.4.2.5 Properties

The properties section provides users with additional key information about items. The properties section is broken down into a category:

• **Version**: Provides information about what version is being viewed, and when the latest modification has been made

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4.6 Organization

The Organization Module is a structured viewing model, allowing users to view, navigate and interact with different components of the organization. This module allows users to navigate through an organization to view corporate and department structure, as well as the Assets, Roles and Resources.

The functional purpose of the Organization Module is to provide users with a structured view of the organization. It lets users navigate through an organization, the different departments and how these departments fit into the big picture. It additionally, houses all major items that each department features.

These major items fall into 4 categories:

Item	Description	Example
Org Units	A specific sub-set of an organization responsible for a set of functions	HR Department
Asset	Property, owned or controlled by an organization, that assists with organizational activities	ERP System
Roles	Represent specific skill sets, represented by positions within an organization. They define the requirements needed to perform an activity without ascribing them to a specific individual	Human Resource Manager
Resources	Represent specific employees who work for an organization	Joe Smith

These 3 different items are mapped out and created within different organizational units. The Organization Module categorizes each of these items within specific different departments, allowing users to understand where these fit within the organization.

> Assets, Roles and Resources can be involved, associated and/or responsible for components outside of the department they are featured under. This happens in dynamic organizations where individuals have multiple responsibilities and purposes.

The EPC provides 2 types of graphs for users to view Organizational Structure:

1. Impact Graphs
2. Hierarchy Graphs

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These views have various view-specific options that the user can define to display the organization in a way that best suits them best.

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4.6.1 Module Overview

Organization viewing is a key function of the EPC and allows users to view personal, role and company structure. The EPC provides 3 different dimensions, allowing users to properly view and understand their organizational structure.

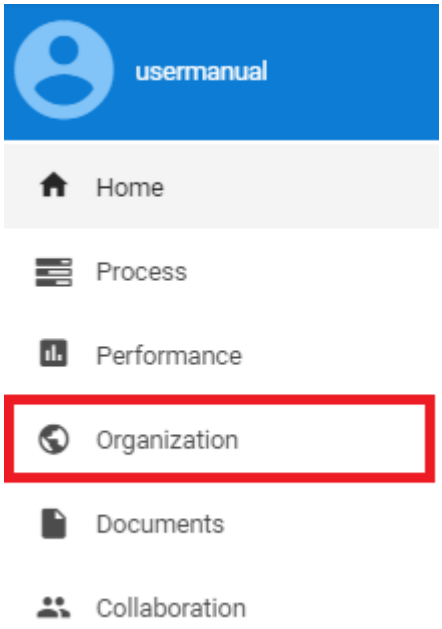
Dimension	Details
1. List	Provides view of all items that you have access to
2. Graph	Provides the visual representation of an organization, their features and links (Impact, Hierarchy Graphs)
3. Details	Provides additional key information regarding specific items (Org Units, Assets, Roles, Resources)

Organizational items that have been published from the EPC Modeler can be viewed in this module.

How to access the Organization Module:

1. Click on the **Navigation Menu Button** on the top left of your screen.

2. Click on **Organization**



3. By default, you will be directed to List View in the Organization module (as seen below).

4.6.2 List

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

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

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

Setting	Description
1. List All	A list view where **all** items within the given module are listed
2. Drilldown List	A list view where **all levels below** the selected item are listed
3. Contextual List	A list view where **1-level level below** the selected item are listed

Organization List Components

Component	Description
Favorite	Allows users to sort processes by favorites vs. non-favorites
Name	Textual search for any existing name of an object
Org Units	The Org Unit
Type	The type of the object
Modified Date	The last date that the object in question was modified

The number of columns displayed will be contingent on the user's screen resolution.

To navigate to List View, please see the steps below:

1. Click on the **Navigation Menu Button** on the top left of your screen

2. Click on **Organization**

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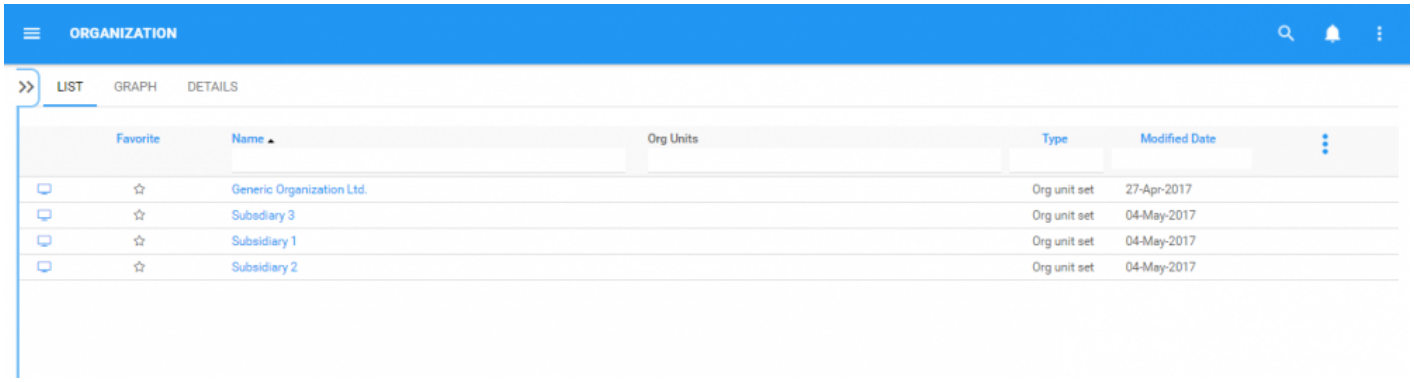
3. You will be directed to **List View** in the Organization module (as seen below).



Upon navigating to the Organization Module, users will view all major items that they are associated too.

To simplify organization viewing; users are not greeted with all major organizational items, roles, assets and resources. However users can display these measures within the List View. Please see the Optional steps below:

4. **(Optional)** To view sub-components, users must select the “Drilldown List” available on the upper right corner to the EPC Web App.

5. **(Optional)** Upon selecting the “Drilldown List”, the EPC will automatically re-fresh the page

The selected list view will be saved both by web browser and by user.

These steps are only required if a user is using an account or browser for the first time. As noted above, list preferences will be saved by user and browser to simplify navigation.

Please see the Sorting and Filtering sections below for further detail.

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4.6.2.1 Sorting

Sorting allows users to classify organizational items based on selected criteria. You can **sort** list results for any column title that is written in BLUE.

The following are the fields that users can use when sorting through Performance in List View:

Filter	Details
Favorite	Allows users to sort organizational items by favorites vs. non-favorites
Name	Allows users to sort organizational items by a key number
Type	Allows users to sort organizational items by their specific type
Modified Date	Allows users to sort organizational items chronologically by date last modified

How to use “Sorting” Function

1. Navigate to the Organization Module

2. Navigate Cursor to desired **Category**

3. Click on the **Category**

1-Click will sort the Category in Ascending order, reflected by ?
2-Clicks will sort the Category in Descending order, reflected by ?
3-Clicks will Remove the sorting action
Ascending Example: The Name column is sorted in **ascending** order.

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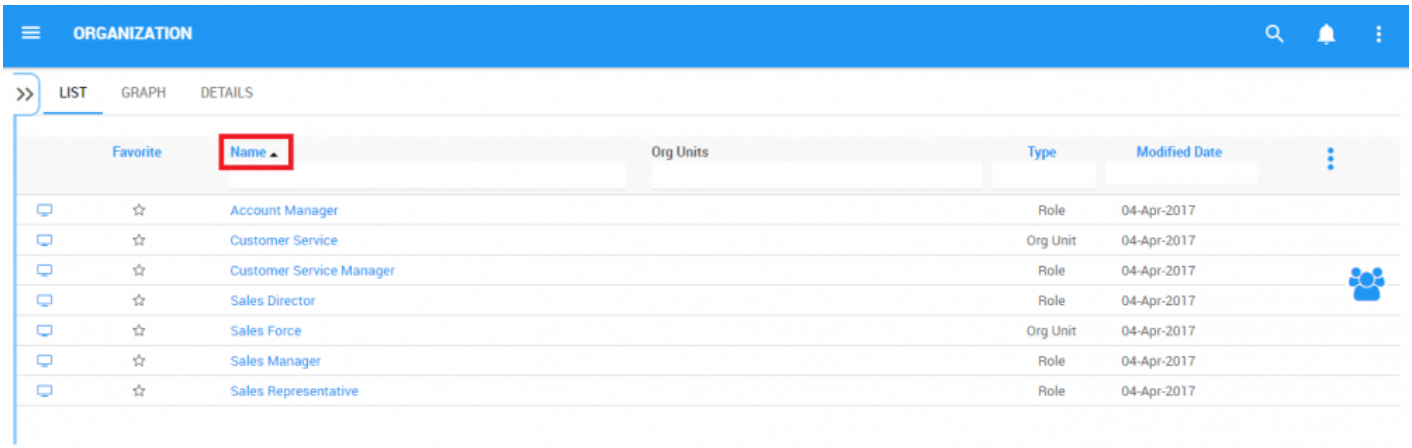
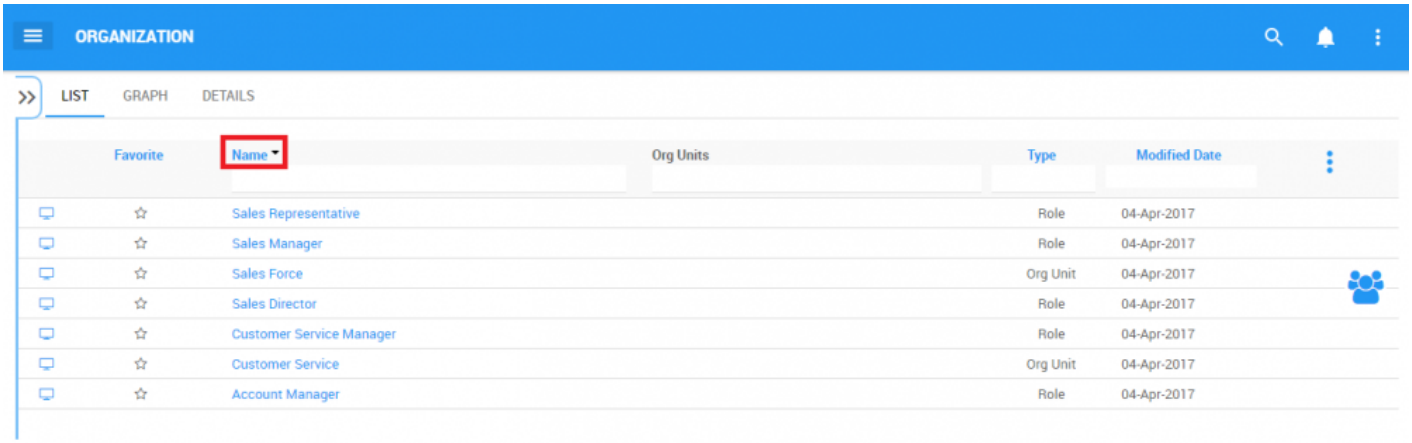


Descending Example: The Name column is sorted in **descending** order.



Multi-sorting (sorting multiple columns) is available.

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4.6.2.2 Filtering

Filtering is a useful way for you to extract a specific subset of EPC content based on conditions related to what you need to find.

You can filter the Organization list by the following.

Column	Options
Name	Textual search for any existing name of an object
Org Units	Which organization unit items correspond too
Types	Org Unit Role Asset Resources
Modified Date	The date the item has been last modified

The Filtering section will cover the following:

1. How to Add Filters
2. How to Remove Filters
3. How to Combine Filters

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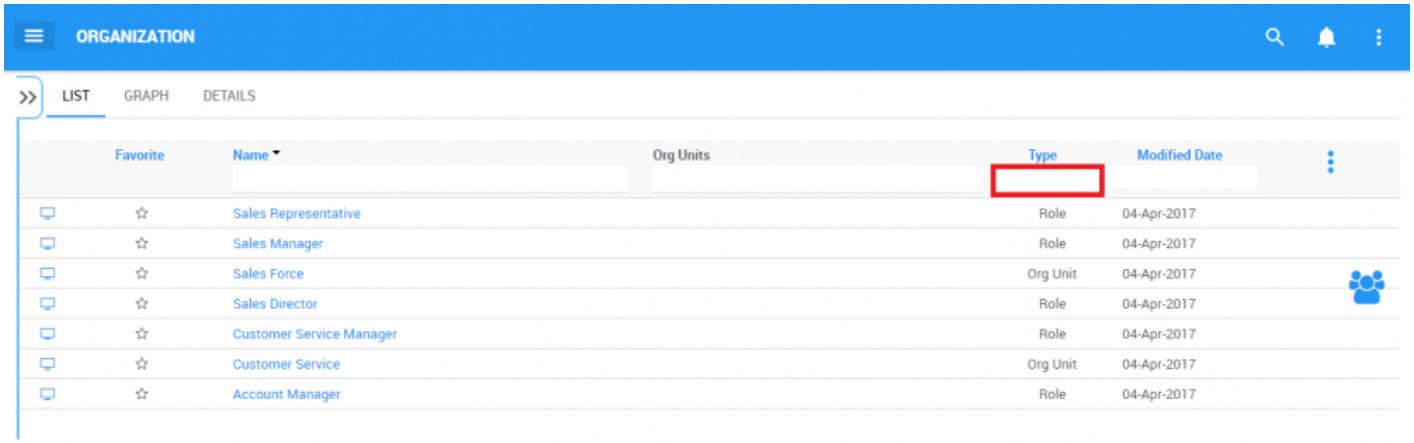
4.6.2.2.1 Add Filter

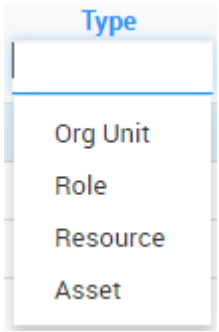
You can add filters to see organization units and other specific objects of your choice. **Type** what you are looking for, **select** the filter in the drop-down menu, or **define the range of dates**.

How to Add Filter

1. Navigate cursor and select the box column you wish to filter. For this example, we will use **Type**.



2. Select the box, which will generate a drop down menu



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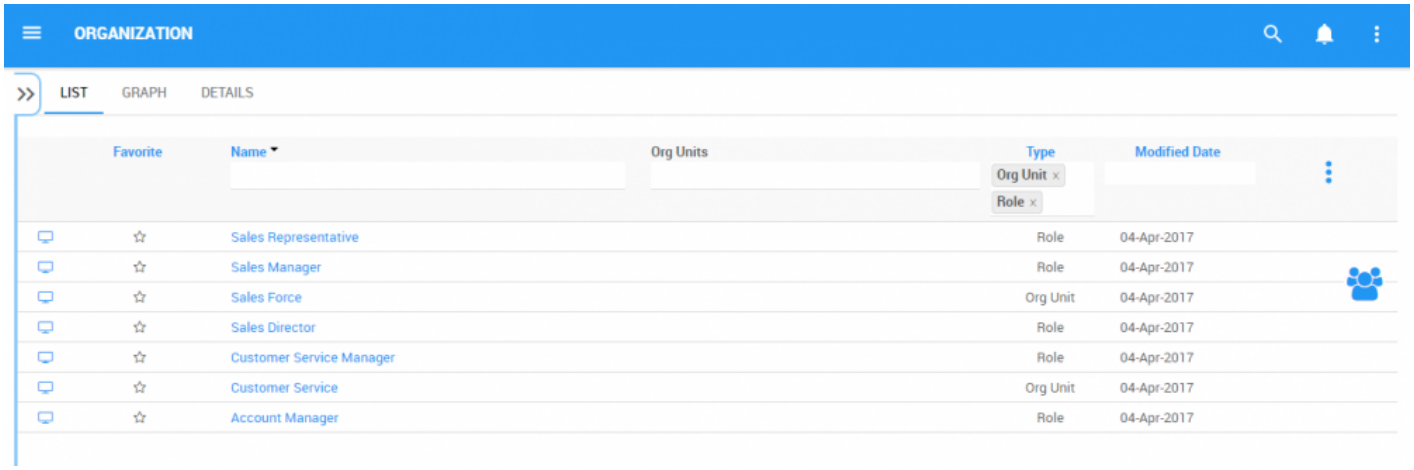
3. Select the desired filter. For this example, we will select **Org Unit** and **Role**.



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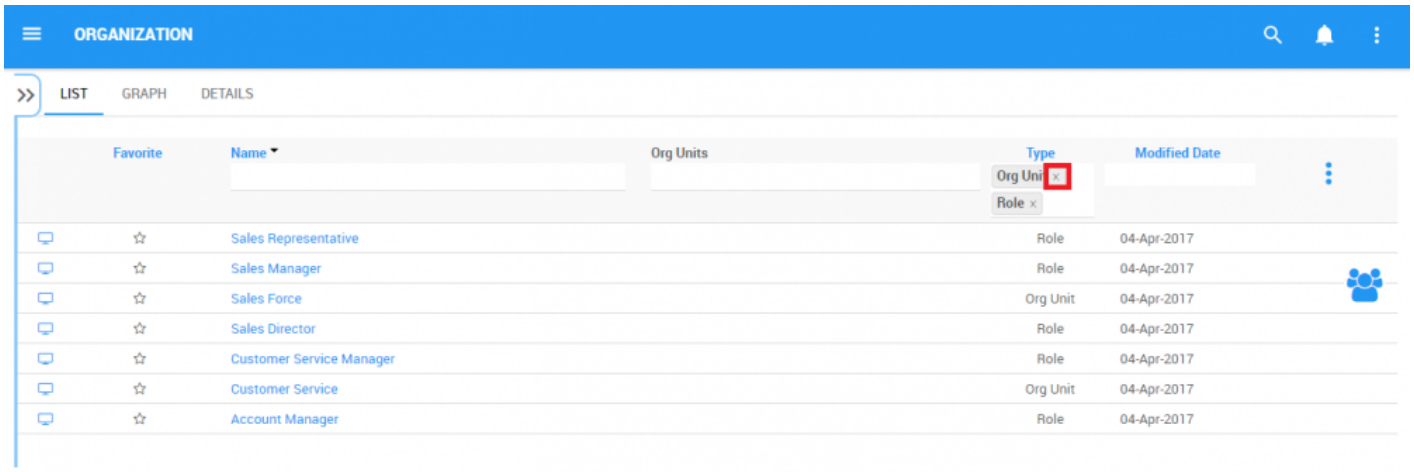
4.6.2.2.2 Remove Filter

You can remove filters; this will naturally increase the results in your list. See below to know how to add filters.

How to Remove Filter

To do so, click on the button beside the filter name.



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4.6.2.2.3 Combine Filter

You can combine filters, meaning you can add any other column filter to isolate results. See above to see how to **add** filters.

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4.6.2.3 Quick Graph View

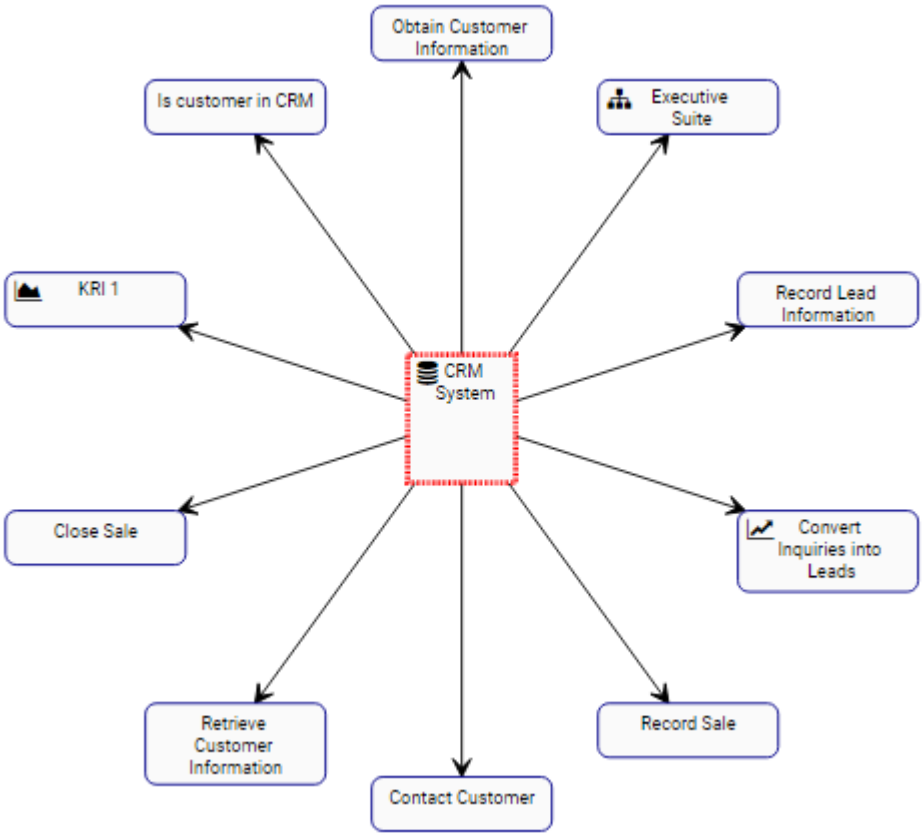
Quick Graph View is a feature of the EPC Web App that allows users to immediately view a graph associated with an Organizational item. While Graph's will be further explained below, the Quick Graph View allows users to quickly navigate to a Graph from "List View".

Please see the instructions below:

1. Navigate to Organization Module

2. Once in List View, click on the button in the left hand column of the item you'd like to see in Graph View.

3. You will be redirected to the Impact Graph page of the selected object



Please see Graph section below for further details on Graph navigation, viewing and customization.

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4.6.3 Graph

Graphs are used as a visual representation of Organizational items. Graphs allow users to map out their organization and provide key stakeholders with item-specific information. They provide users with a high-level overview of Organization, the associated roles, resources, assets, and org units.

The following will be covered in the Graph section:

1. **Graph Navigation**
2. **Graph Types (Impact, Hierarchy)**

The Graph view setting displays an expanded view of your entire process in a graphical Organization Structure format where flow objects and associated objects are displayed on the map based on your defined display settings.

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4.6.3.1 Graph Navigation

Understanding how to navigate to graphs and how to navigate within graphs allows users to fully utilize the EPC. Users can navigate to Graph View by using the “Quick Graph View” icon , or by manually navigating to Graph View.

This section will outline Manual Navigation, please see Quick Graph View section above for alternative navigation options.

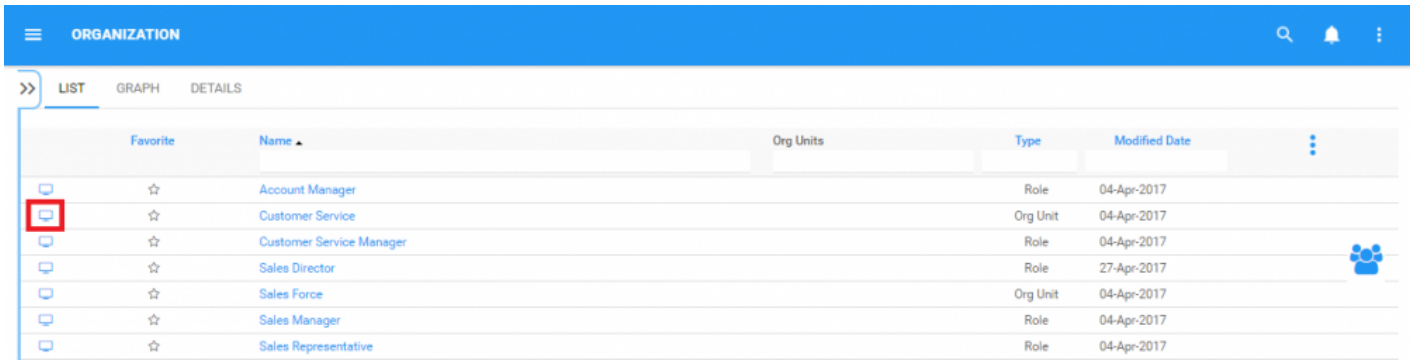
How to navigate to the Graph section (Manual Navigation)

1. Click on the **Navigation Menu Button** on the top left of your screen.

2. Click on **Organization**

3. By default, you will be directed to List View in the Organization module.

4. Select any item on the list by clicking on the graph icon of the desired item



5. You will be navigated to the Graph section

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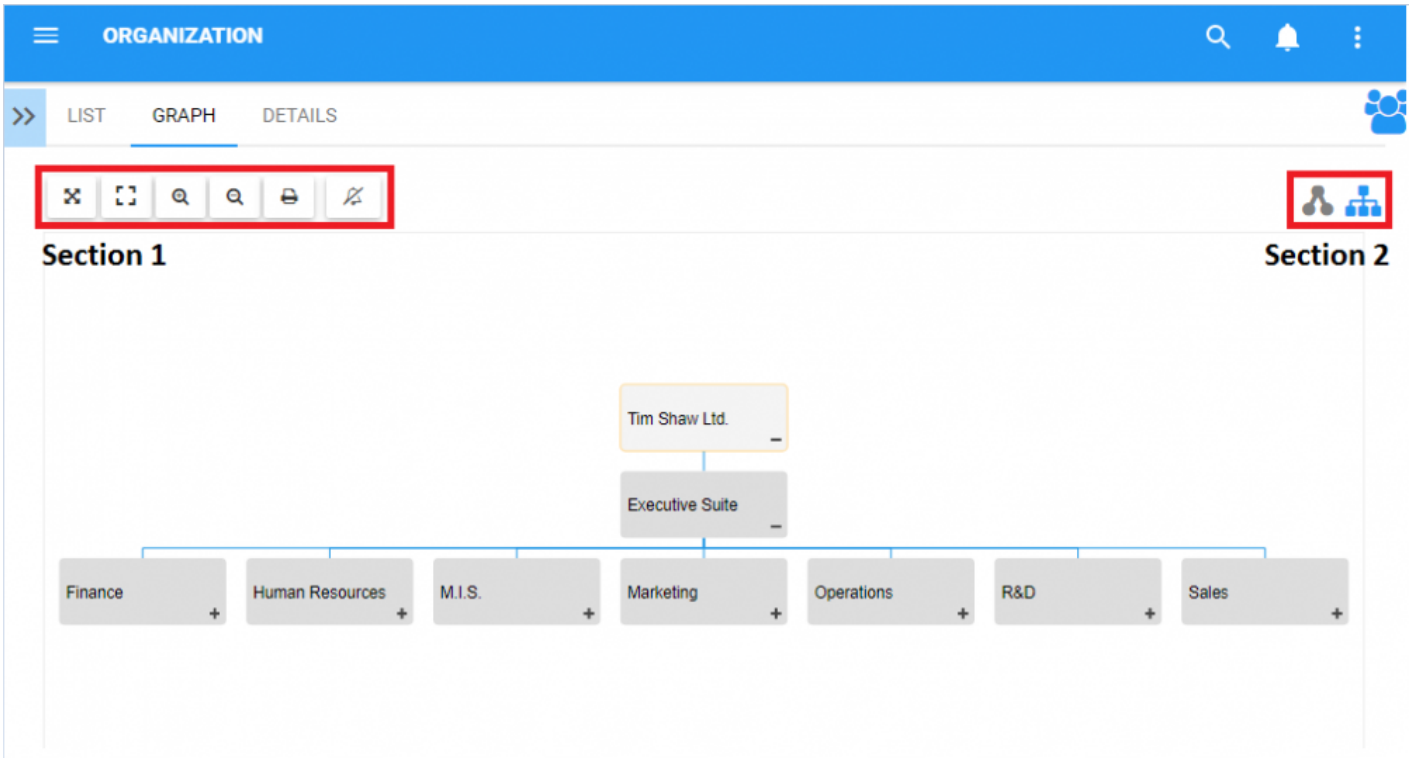
4.6.3.1.1 Navigating In Graphs

Navigation within the graph section is primary controlled by the toolbar at the top of the page. The toolbar is divided into 2 sections.



Section 1: items are focussed on user viewing and graph functionality. Please see the table below for a full list and description of each item.

Item	Icon	Description
Fit Screen		This button will center the selected item on the users screen
Full Screen		This button will enlarge the item and fit a large-scale view to the users screen
Zoom In		This button will allow a user to zoom in to better view an item or item
Zoom Out		This button will allow a user to zoom out to better view an item or item
Print		This button will allow a user to print the graph being viewed

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Subscribe		This button will allow a user to subscribe to the item being viewed. The icon will be displayed in white when a user is not subscribed to an item The icon will be displayed in blue when a user is subscribed to an item.

Section 2: items are focussed on Graph selection. Please see the table below for a full list and description of each item.

Item	Icon	Description
Impact Graph		Graph showing downstream representation of associated items
Hierarchy Graph		Graph showing a top-down view of an organization

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4.6.3.1.1.1 Fit Screen

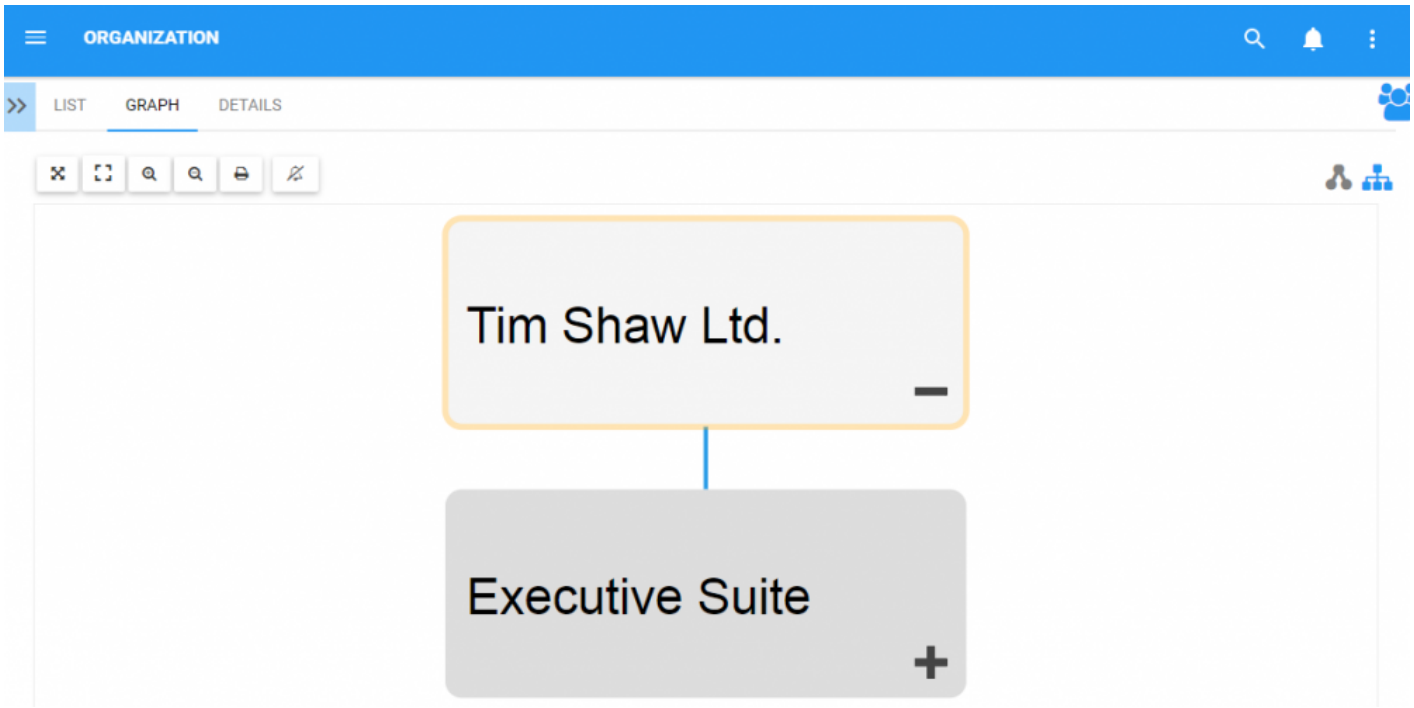
The fit screen function has been implemented to assist users at replacing and re-centering the window.

To use the fit screen button, please see the following instructions.

1. Navigate to an Org Unit within the Organization Module

2. Click on the “Quick Graph View icon

3. Alter the Graph (Zoom in, out or shift). Please see zoom instructions below for further details.



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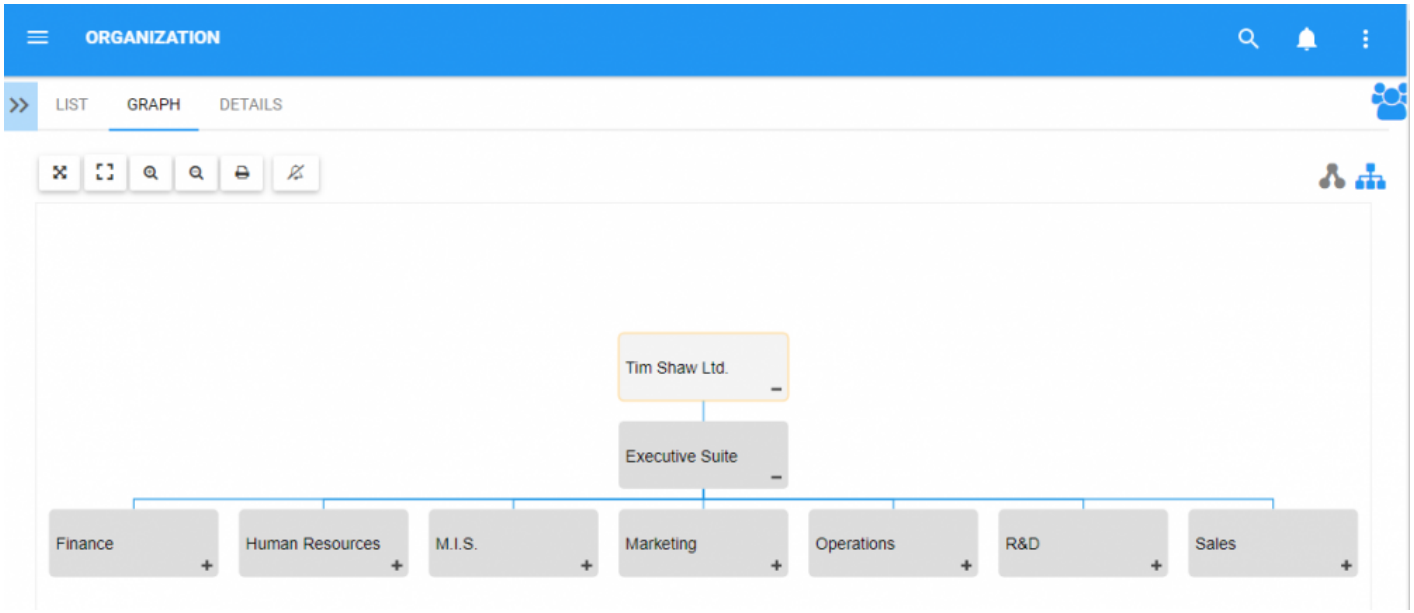
4. Click on button and the page will be reset



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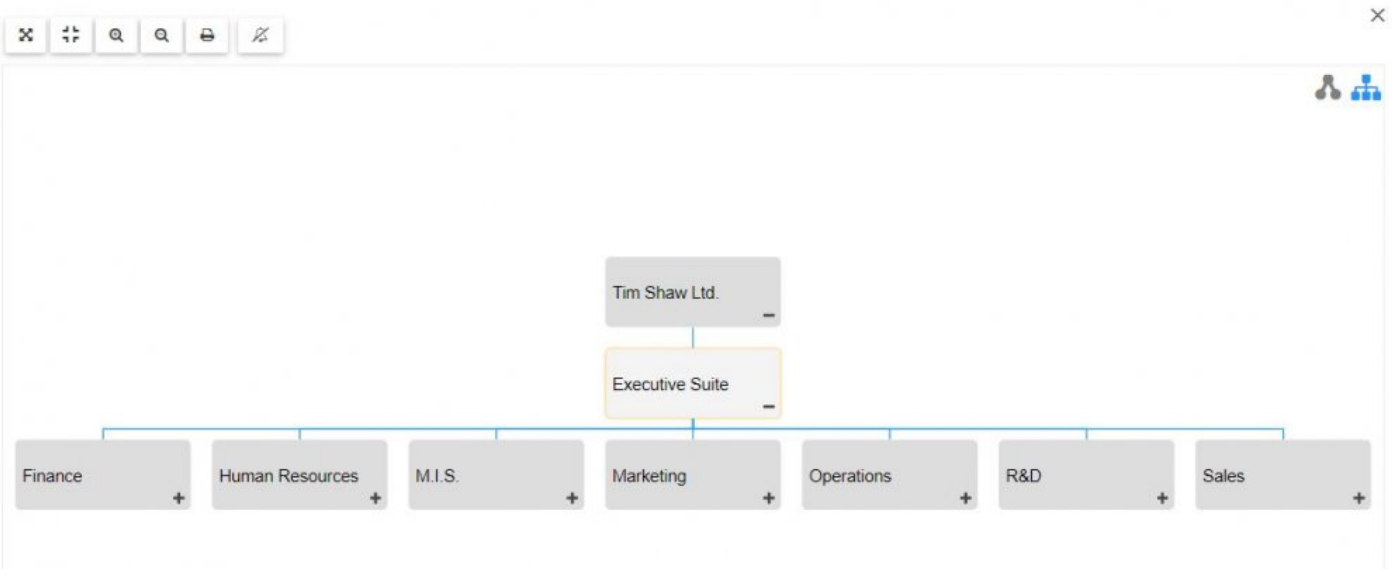
4.6.3.1.1.2 Full Screen

The full screen function has been implemented to assist users at viewing Organizational items, utilizing the full screen of a user.

To use the Full Screen button, please see the following instructions.

1. Navigate to an Org Unit within the Organization Module
2. Click on the "Quick Graph View icon
3. Click on button and the Graph will be set to "Full Screen View"



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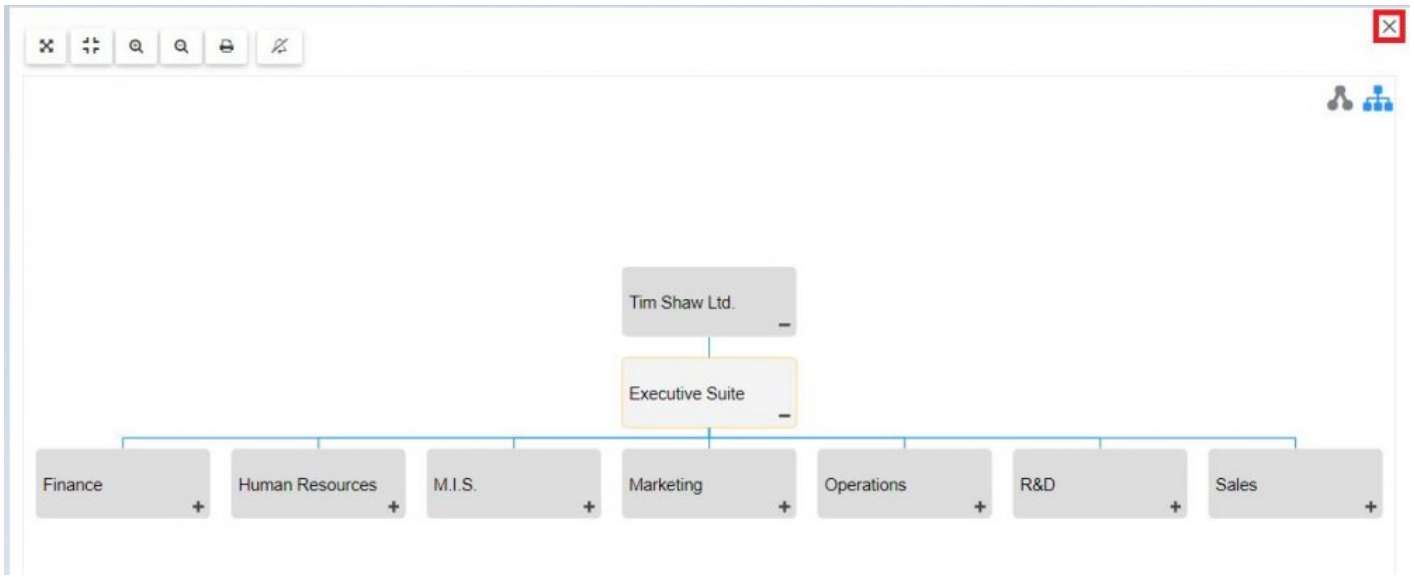
4. To close “Full Screen View” click on the ✕ on the upper right corner



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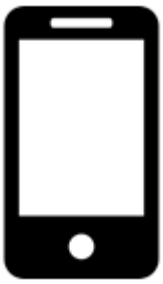
4.6.3.1.1.3 Zoom In

The zoom function has been implemented to assist users in viewing specific items within selected Organization items.

To use the Zoom In button, please see the following instructions.

1. Navigate to an Org Unit within the Organization Module
2. Click on the “Quick Graph View icon
3. Select the Zoom in button
4. Repeat step 3 until reaching the desired Zoom

> Users can also use their mouse wheel to zoom in and out



Users can zoom in or out on mobile devices with the use of 2 fingers. Zooming In: Place two fingers on the screen and drag them in opposite directions until desired zoom is reached.

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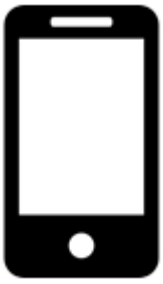
4.6.3.1.1.4 Zoom Out

The zoom function has been implemented to assist users in viewing specific items within selected Organization items.

To use the Zoom Out button, please see the following instructions.

1. Navigate to an Org Unit within the Organization Module
2. Click on the "Quick Graph View icon
3. Select the Zoom out button
4. Repeat step 3 until reaching the desired Zoom

> Users can also use their mouse wheel to zoom in and out



Users can zoom in or out on mobile devices with the use of 2 fingers.
Zooming Out: Place two fingers on the screen and drag them towards each other until the desired zoom is reached

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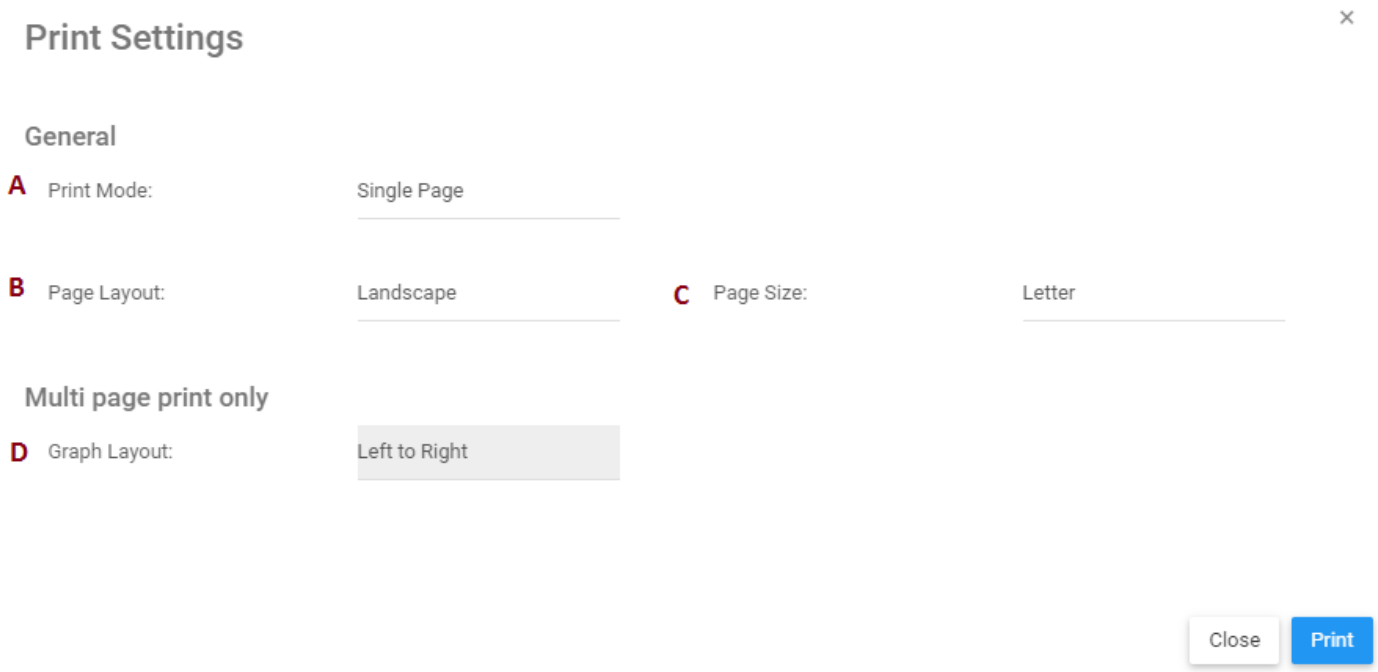
4.6.3.1.1.5 Print

The Print button has been added to allow users to easily print a desired graph.

To use the Print button, please see the following instructions.

1. Navigate to a an Org Unit within the Organization Module
2. Click on the "Quick Graph View icon
3. Select Print button at the upper left corner of the page
4. A print settings menu will be generated on the user's screen



Setting	Options	Description
Print Mode	a. Single Page a.b. Multi Page	Fit the displayed content over a single page Spread the displayed content over multiple pages
Print Layout	a. Landscape a.b. Portrait	Landscape ("Sideways") page orientation Portrait ("Top-Down") page orientation
Page Size	a. Letter a.b. Legal a.c. A3a.d. A4	8.5 × 11.0 in 8.5 × 14.0 in

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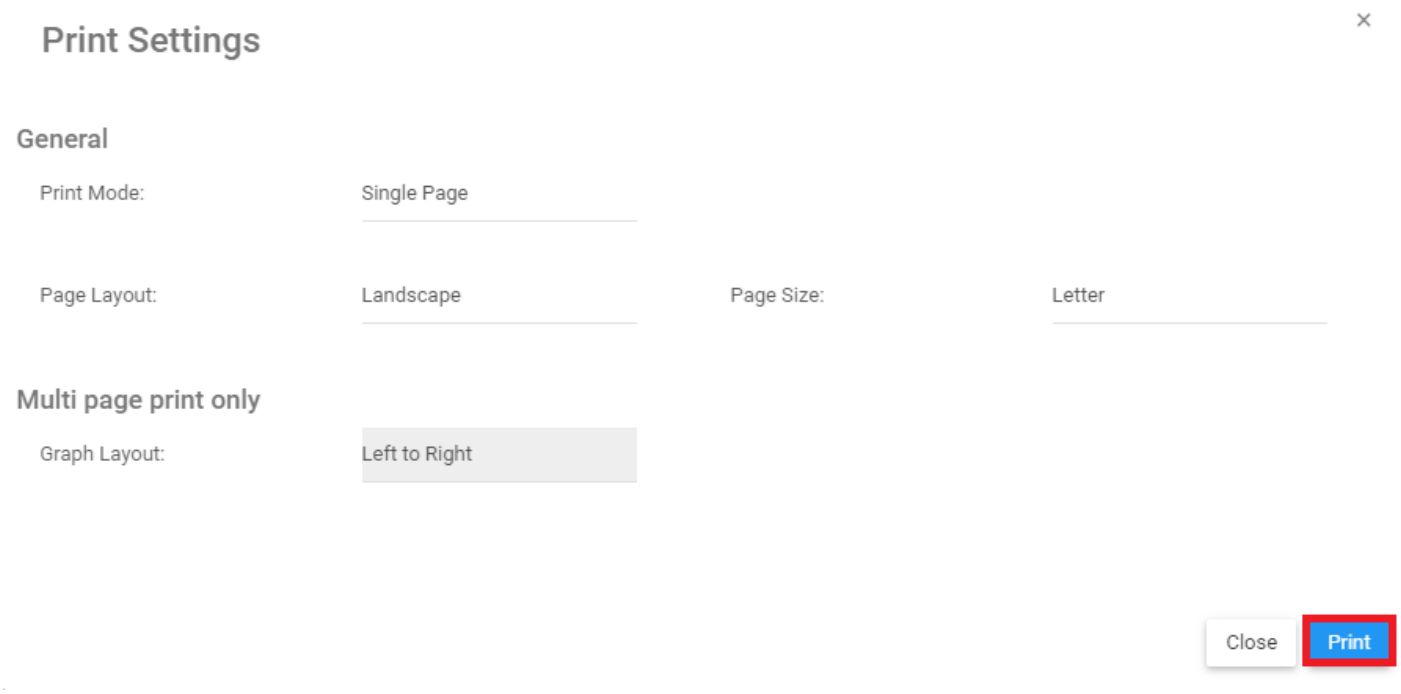
		30 × 42 cm 21 × 30 cm
Graph Layout	a. Left to Right b. Top to Bottom	Sideways layout of graphic being printed (multipage) Top-down layout of graphic being printed (multipage)

5. Select desired print settings and click the print button at the bottom right corner of the window



4.6.3.1.1.6 Subscribe

The subscribe function, symbolized by the icon, has been added to allow users to track items, objects and processes in the EPC. Users can subscribe to specific items or processes to simplify and centralize monitoring activities. By subscribing to items, users will receive notifications when items or processes are altered or optimized. Additionally, item subscriptions is a useful filter and option for Home page Widgets, allowing users to create Widgets specifically featuring items they deem as critical to their individual jobs.

The subscribe button can be found on all item pages, in both Graph and Details sections.

To use the Subscribe button, please see the following instructions.

1. Navigate to an Org Unit within the Organization Module
2. Click on the “Quick Graph View icon
3. Select Subscribe button at the upper left corner of the page
4. The button will change color to , symbolizing that a user is now subscribed to the item in question.

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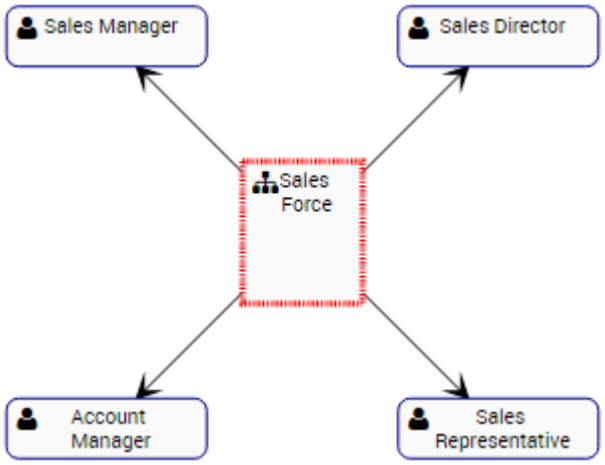
4.6.3.2 Impact Graph

Impact Graphs provide a visual representation of the upstream and downstream associations related to items in the EPC. In simple terms, Impact Graphs show users what items are associated to one another. Seeing the different associations within an organization allows users to better understand the complexity or certain business activities, as well as the true effect of changes within the organization.

Impact Graph



The example features the Impact Graph of the “Sales Force” Org Unit. The Org Unit itself has a Roles (Sales Manager, Sales Director, Account Manager and Sales Representative) associated with it. The specific nature of the items associated is denominated by the icon featured next to the name of the items.

The Graph provides an initial visual representation of items that **directly** impact one another. Users can additionally expand the Impact Graphs to view **indirect** associations.

Users can **double click** on specific items within the Impact Graphs, which will display the associations to that item.

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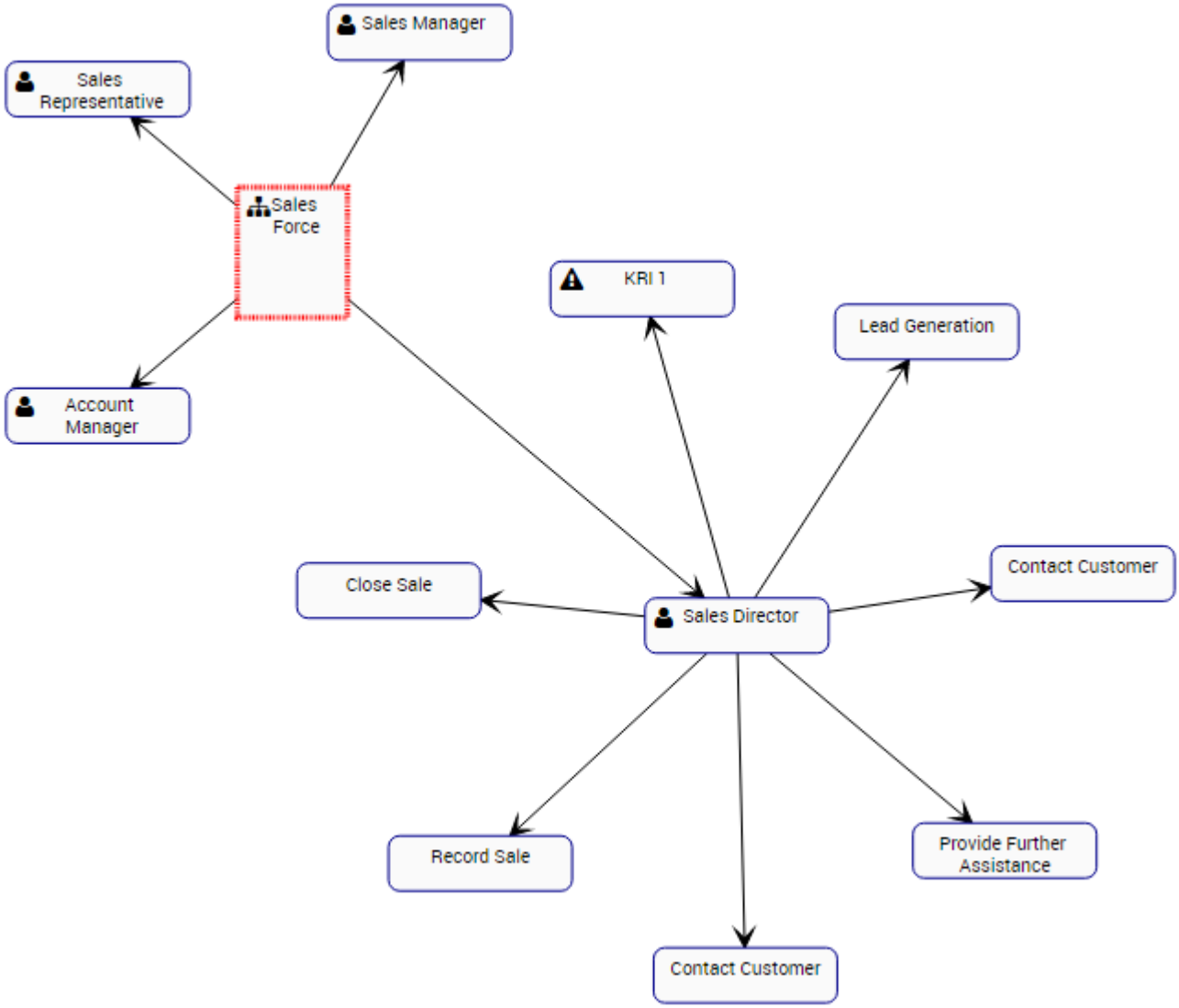

These Impact Graphs can be used to educate business users, to analyze internal business processes and help management optimize activities effectively. Additionally, they help in the preparation of change management plans, allowing managers to map out the effect of any organizational change.

Impact Graph Navigation

To navigate to Impact Graphs, please see the following instructions.
1. Navigate to an Org Unit within the Organization Module

2. Click on the “Quick Graph View” icon

3. By default, a user will be navigated to the Measures Hierarchy Graph. To view a specific item’s Impact Graph, a select the “Impact Graph” icon

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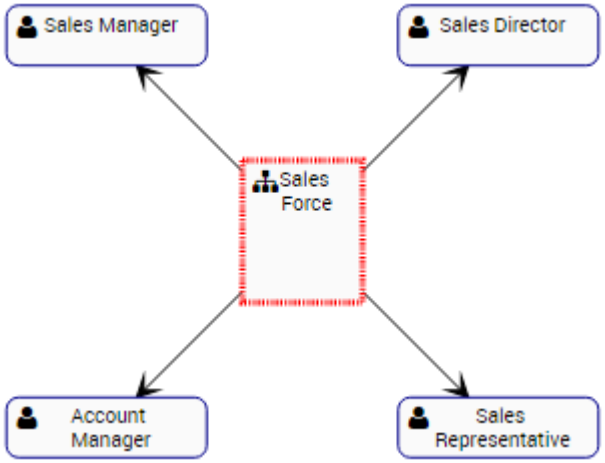
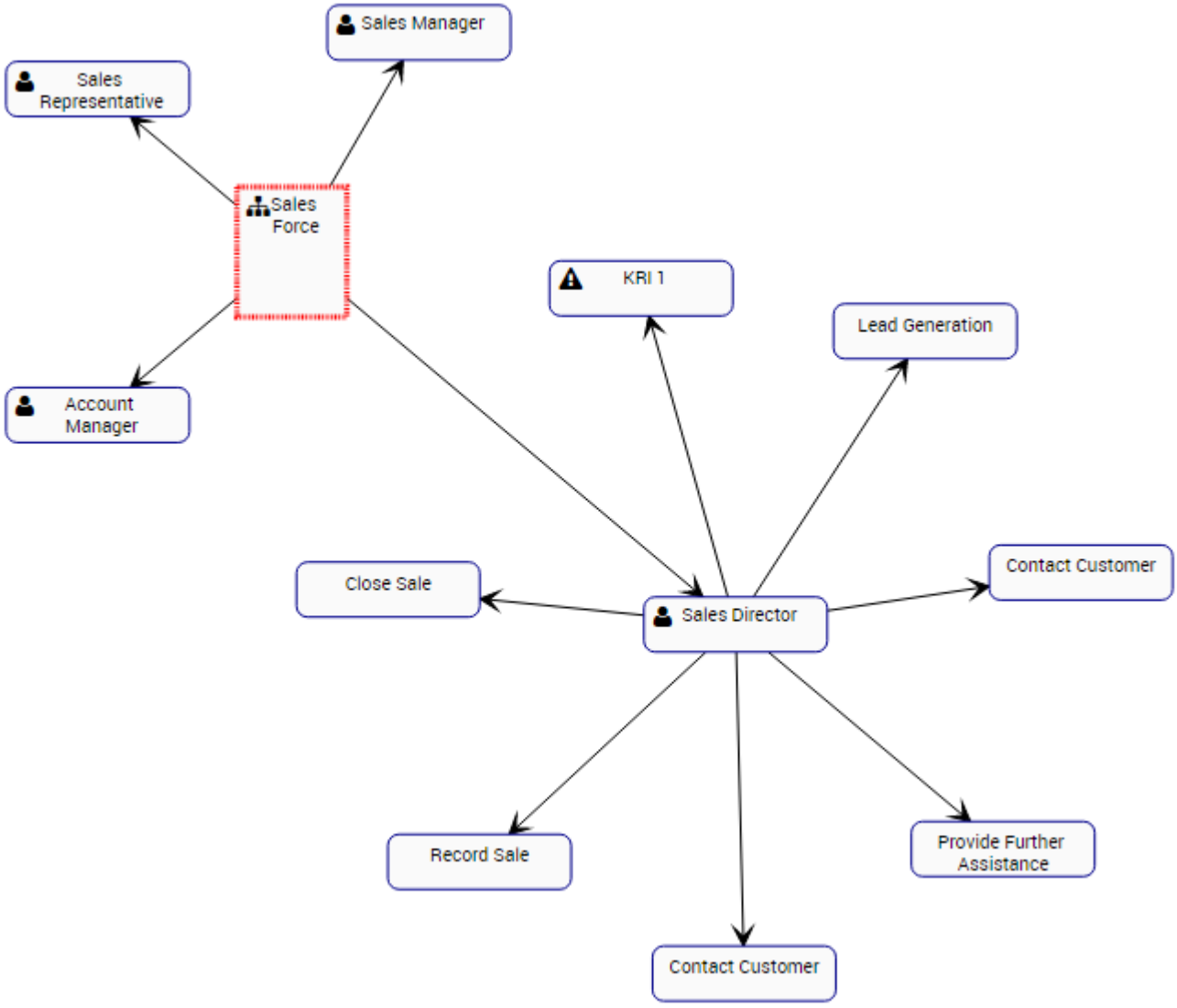
4. You will be navigated to the specific item's Impact Graph



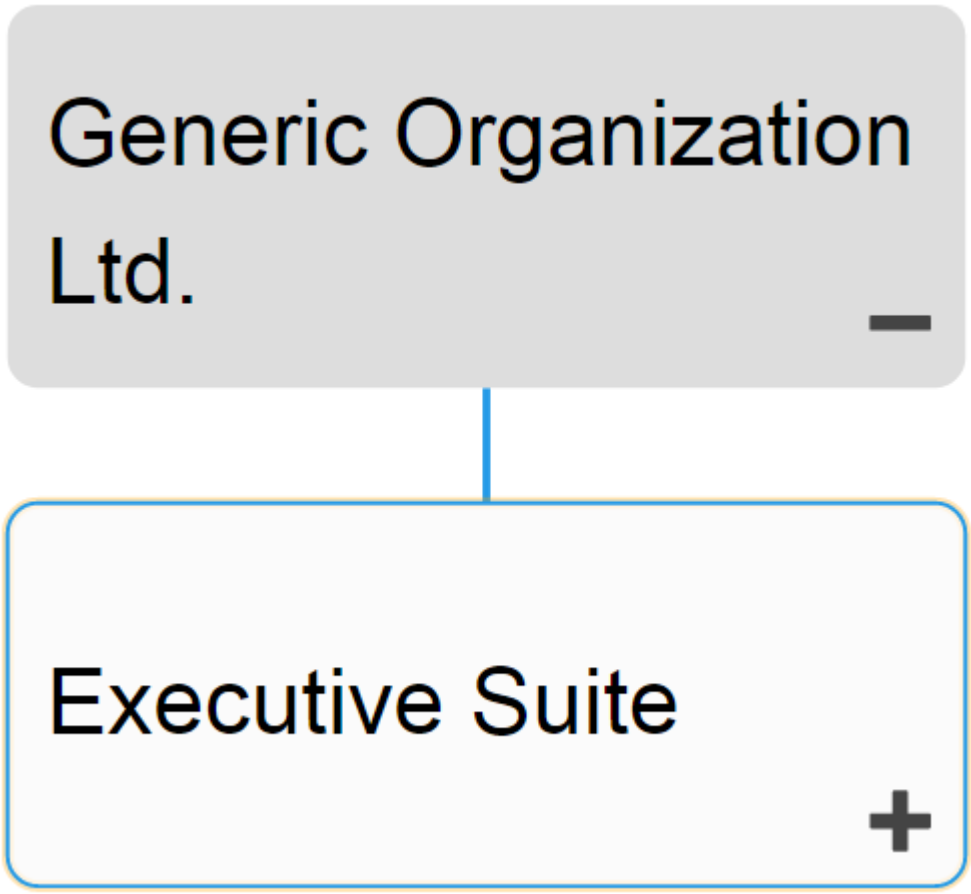
5. (Optional) To further expand the Impact Graph, simply double-click on the item to which you would like to display



4.6.3.3 Hierarchy Graph

Hierarchy Graphs allows users to view the vertical and horizontal hierarchy of an organization This view provides users with a graphical representation of where specific Org Units fit within the overall organization.

Hierarchy Graphs show users to see all business Organizational items as well as where they fit within an organization. This allows organizational users to understand organizational activities and gauge complexity of business performance.



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Users can expand and close item sets easily, allowing users to view a high-level organization structure, and expand sections they wish to gain further information on.

Hierarchy Graph Navigation

To navigate to Hierarchy Graphs, please see the following instructions.

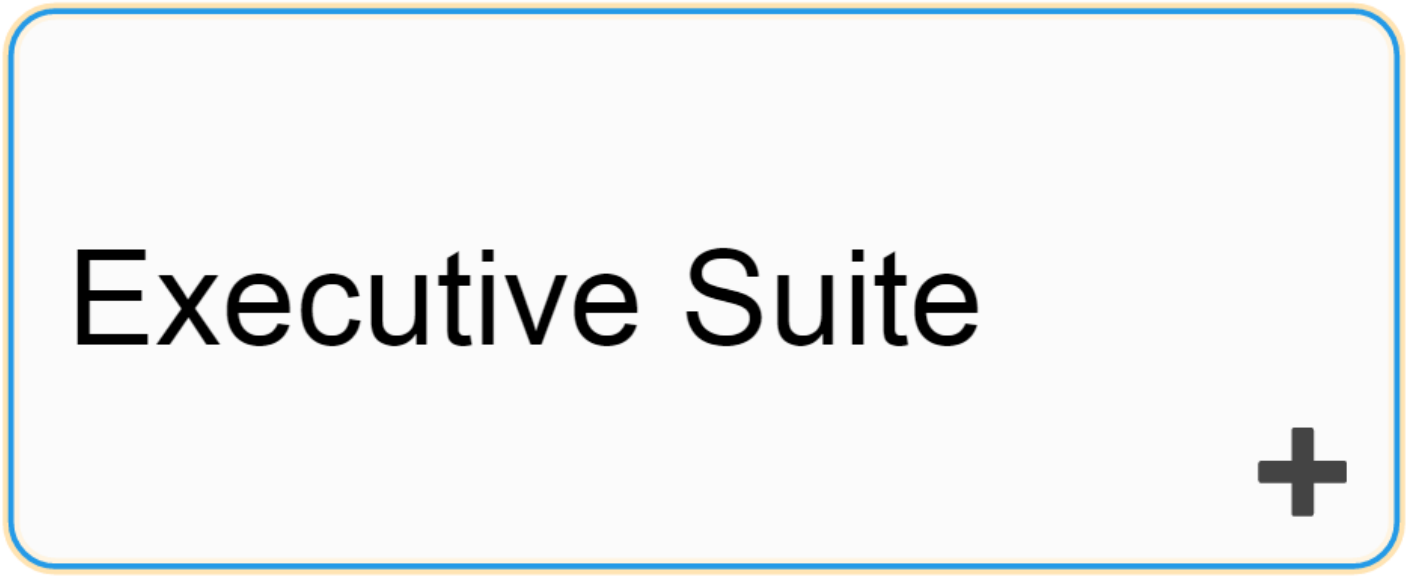
1. Navigate to Organization

2. Select the item to which you would like to view.

> The further you navigate, the more you limit the scope of Hierarchy Graphs. To view a complete picture of organizational structure, select items listed as “Org Units” in List View

3. Select the “Quick Graph View” icon of the desired item

4. You will be navigated to the Org Units Hierarchy Graph. The entire set will not be fully displayed upon initial navigation and will display the individual item selected.



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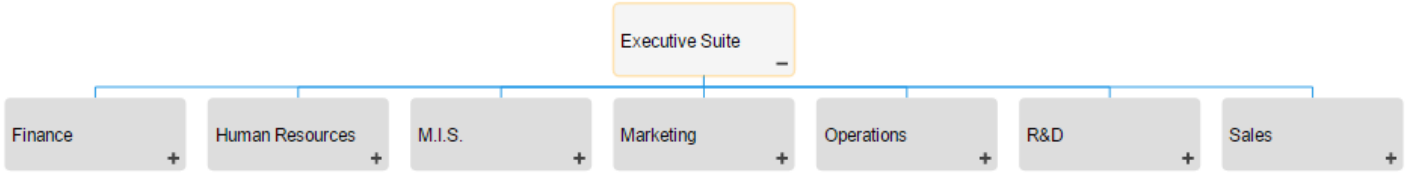
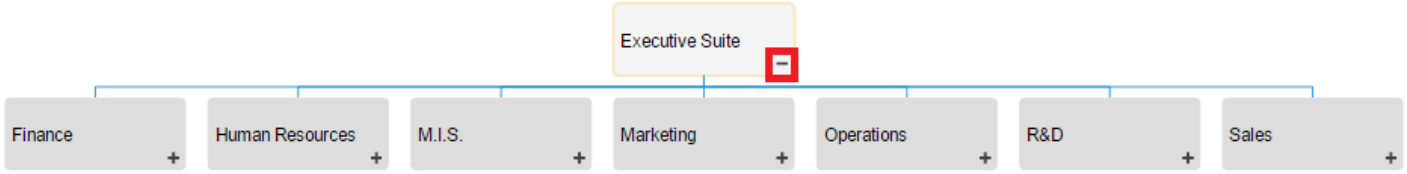
5. To further expand components of the Hierarchy Graph, double click on the on the objects in the Graph. This will expand the item selected.



6. Repeat step 5 until you reach the desired depth.

7. To close opened items, double-click on the icon



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4.6.4 Details

The Description section is where you will find details about the organization you are observing. This rich text area allows for the display of all additional details that has been uploaded regarding the item in particular. These details provide users with all critical information about items that has been uploaded by EPC Modelers.

The details section is where users can see all information about items.

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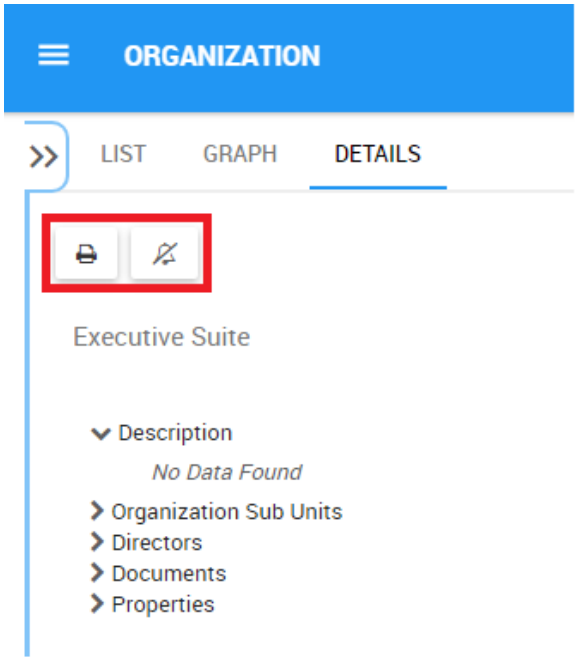
4.6.4.1 Navigation

Users can navigate between items using the **toolbar** at the top of the page. Further details can be found in the toolbar section below.



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4.6.4.1.1 Toolbar

The toolbar provides users with a variety of functions to navigate and leverage the details page.

Item	Icon	Description
Print		This button will allow a user to print the details page being viewed
Subscribe		This button will allow a user to subscribe to the performance measure being viewed. The icon will be displayed in white when a user is **not subscribed** to an item The icon will be displayed in blue when a user **is subscribed** to an item.

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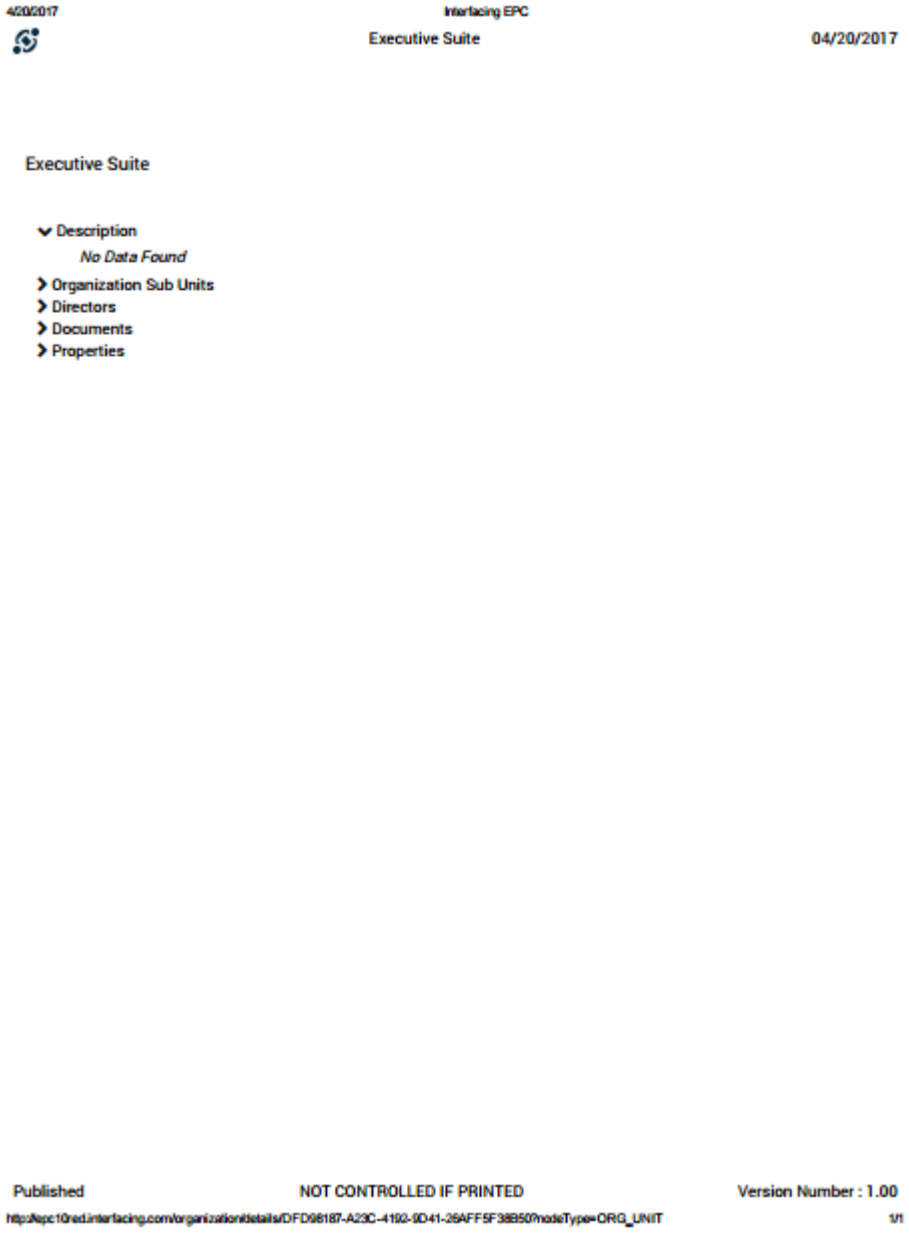
4.6.4.1.1.1 Print

The print button allows users to directly print the details page that they are currently viewing. Selecting the print function will automatically generate a formatted details page printout that a user can print directly.



4.6.4.1.1.2 Subscribe

The subscribe function, symbolized by the icon, has been added to allow users to track items, objects and processes in the EPC. Users can subscribe to specific items or processes to simplify and centralize monitoring activities. By subscribing to items, users will receive notifications when items or processes are altered or optimized. Additionally, item subscriptions is a useful filter and option for Home page Widgets, allowing users to create Widgets specifically featuring items they deem as critical to their individual jobs.

To use this function, simply click on the subscribe button, which will change from to .

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4.6.4.2 Attributes

Users can find a variety of information about objects within the details section. This information allows users to fully understand all information about specific items, and provides users with a specific destination that can be used to see and gather all relevant information. Performance Details display the following content

1. Description
2. Organization Sub Units
3. Directors
4. Documents
5. Properties

By default, the attributes within the Details module will be collapsed. Users can expand these attributes by:

1. Clicking on the › next to each item to expand **individual** attributes
2. Clicking on the icon at the bottom right corner of the page to expand **all** attributes

> Selecting different items will result in different information being displayed. The above components specifically relate to the information that will be provided for items.

> The details page ONLY populates details that are specific to each item. For example, if a document is tied to a task, it will only appear in the details page of the task and not in the details page of the organization. Users must navigate to the specific item they wish to obtain its full set of details

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4.6.4.2.1 Description

The description section provides users with all details relating to what an organizational item is, as well as particular information that can assist with execution. This information, populated by EPC Modelers, will provide further details for users to.

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4.6.4.2.2 Organization Sub Units

The Organization Sub Units section displays all the sub-components of a specific organizational unit. It provides a textual hierarchy of units, and the sub-units associated.

Users can navigate directly to the item pages that are featured in this section. Users can click on the specific item's name highlighted in blue. You will be redirected to the item's details page.

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4.6.4.2.3 Directors

The Directors section lists all of the major directors of a department. This provides users with key ranking officials to be contacted if necessary

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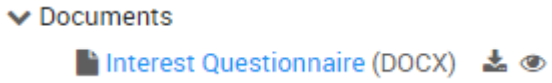
4.6.4.2.4 Documents

This section lists all documents that have tied to the item being viewed. This provides users with a list of relevant documents, as well at the ability to directly access these documents. Users are additionally provided details regarding the document type (docx, pptx, URL, xlxs, etc.)

Users are provided with a direct access link listed in blue. Clicking on the name will navigate a user to the documents details page.



To directly access the document, users can preview, or download the document in questions.

1. Preview: To preview the document click on the icon. Please see the list below for documents available for preview.

2. Download: To download the document click on the icon

Documents Available for Preview:

PDF Files	Available with extension Adobe Acrobat	Available with extension Adobe Acrobat	Available with extension Adobe Acrobat	Available with extension Adobe Acrobat	Available with extension Adobe Acrobat
Image Files **• Png** **• Jpeg, jpg** **• Gif** **• Svg, svgz** **• Tif, tiff**	Available (all)	Available (all)	Available (all)	Available (all)	Available (all)

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• **Wbmp** • **Webp** • **Ico** • **Jng** • **bmp**					
URLS	Available	Available	Available	Available	Available
File Links	Available with extension LocalLinks	Available with extension Local FileSystem Links	Available if Trusted Sites added*	Unavailable	Unavailable
MP3 Files	Available	Available	Available	Available	Available
MP4 Files	Available	Available	Available	Available	Available
WAV Files	Available	Available	Unavailable	Available	Available
Ogg Files	Available	Available	Unavailable	Available	Unavailable

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4.6.4.2.5 Properties

The properties section provides users with additional key information about items. The properties section is broken down into a category:

• **Version:** Provides information about what version is being viewed, and when the latest modification has been made

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4.7 Documents

The Web App provides users with a document repository, where an organization can store all relevant documents to business activities. The Documents Module provides organizations and companies with a central location where they can search through stored documents following an EPC Modeler's designed hierarchy.

Using folders as organizational tools, documents can be organized and classified based on firm criteria. This allows users to organize their files in a manner that best suits them. Users can both preview and download documents stored within the EPC.

The EPC provides 2 types of graphs for users to view Documents and Folders

1. Impact Graphs
2. Hierarchy Graphs

These views have various view-specific options that the user can define to display the documents in a way that best suits them best.

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4.7.1 Module Overview

Document viewing is a key function of the EPC and allows users to view all key internal documents within 1 central repository. The EPC provides 3 different dimensions, allowing users to properly view and understand documents and where they fit in the organization.

Dimension	Details
1. List	Provides view of all documents that you have access to
2. Graph	Provides the visual representation of the hierarchy of documents, their features and links (Impact and Hierarchy Graphs)
3. Details	Provides additional key information regarding specific documents

Documents that have been published from the EPC Modeler can be viewed in this module.

How to access the Documents module:

1. Click on the **Navigation Menu Button** on the top left of your screen.

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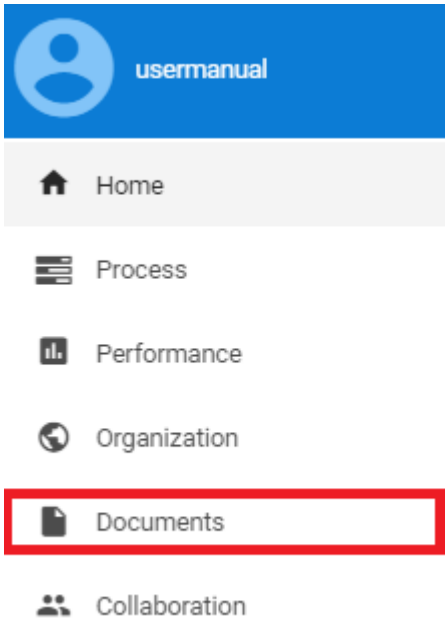
2. Click on **Documents**



3. By default, you will be directed to **List View** in the Documents module (as seen below).

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4.7.2 List

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

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

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

List	Description
1. List All	A list view where all items within the given module are listed
2. Drilldown List	A list view where all levels below the selected item are listed
3. Contextual List	A list view where 1-level level below the selected item are listed

List Components

Component	Description
Favorite	Allows users to sort processes by favorites vs. non-favorites
Name	Textual search for any existing name of an object
Roles	Whether or not there are Roles directly associated with the item in question
Description	Whether or not there is a Description inputted for the item in question
Type	The type of the object
My RASCI-VS	The RASCI-VS associations existing on the item in question
Extension	The extension of the file illustrating the file type (e.g. xlsx, docx, etc.)
Size	The size of the file in question
Modified Date	The last date that the object in question was modified
Status	The current status of the collaboration engagement (Open, Work in Progress, Closed, Rejected)

The number of columns displayed will be contingent on the user's screen resolution.

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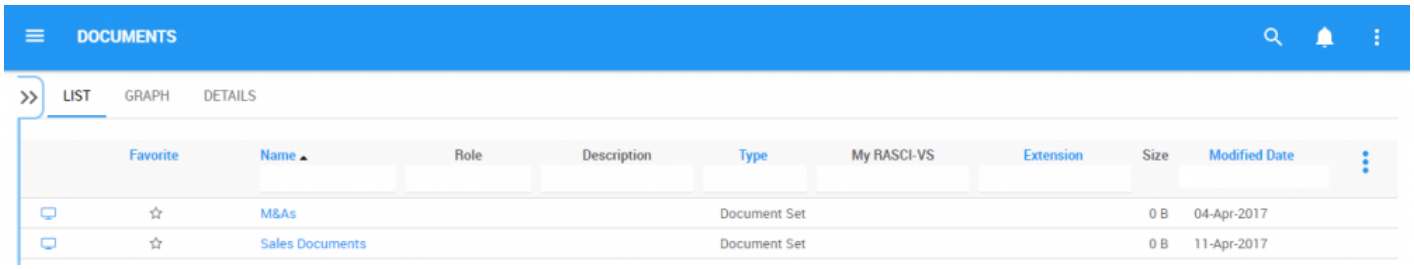
To navigate to List View, please see the steps below:

1. Click on the **Navigation Menu Button** on the top left of your screen

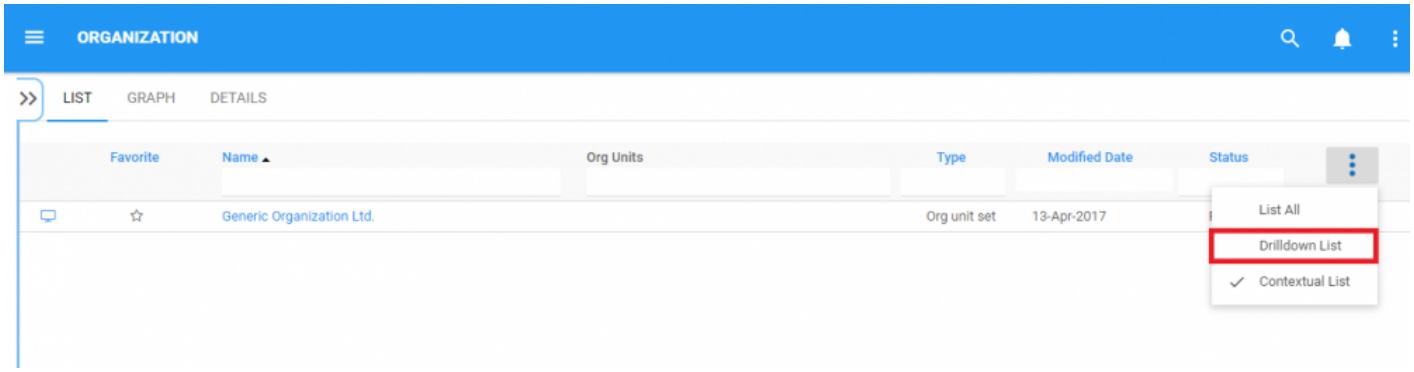
2. Click on **Documents**

3. You will be directed to **List View** in the Documents module (as seen below).

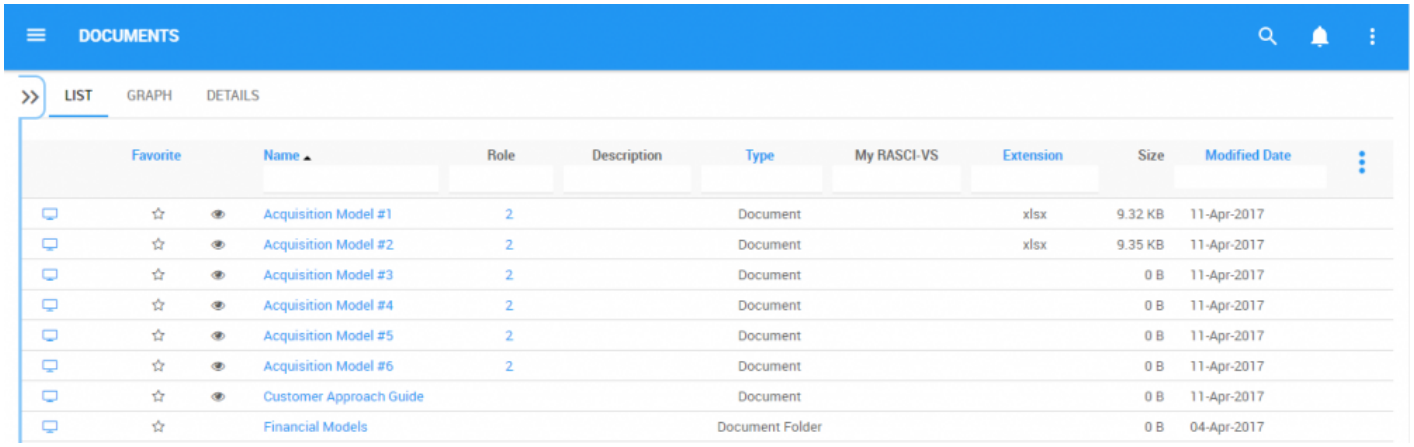


To simplify item viewing; users **are not** greeted with all major documents that they are associated to. However users can display these measures within the **List View**. Please see the Optional steps below:

4. **(Optional)** To view sub-documents, users must select the “Drilldown List: available on the upper right corner to the EPC Web App.



5. **(Optional)** Upon selecting the “check box”, the EPC will automatically re-fresh the page



The selected list view will be saved both by web browser and by user.

These steps are only required if a user is using an account or browser for the first time. As noted above, list preferences will be saved by user and browser to simplify navigation.

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4.7.2.1 Sorting

Sorting allows users to classify documents based on selected criteria. You can **sort** list results for any column title that is written in BLUE.

The following are the fields that users can use when sorting through Documents in List View:

Filter	Details
Favorite	Allows users to sort documents by favorites vs. non-favorites
Name	Allows users to sort documents by a key number or word within document name
Type	Allows users to sort documents by their specific type
Extension	Allows users to see the specific extension type of the document (xlxs, pptx, docx, etc.)
Modified Date	Allows users to sort documents chronologically by date last modified

How to use “Sorting” Function

1. Navigate to the Documents Module

2. Navigate Cursor to desired **Category**

3. Click on the **Category**

1-Click will sort the Category in Ascending order, reflected by ?
2-Clicks will sort the Category in Descending order, reflected by ?
3-Clicks will Remove the sorting action

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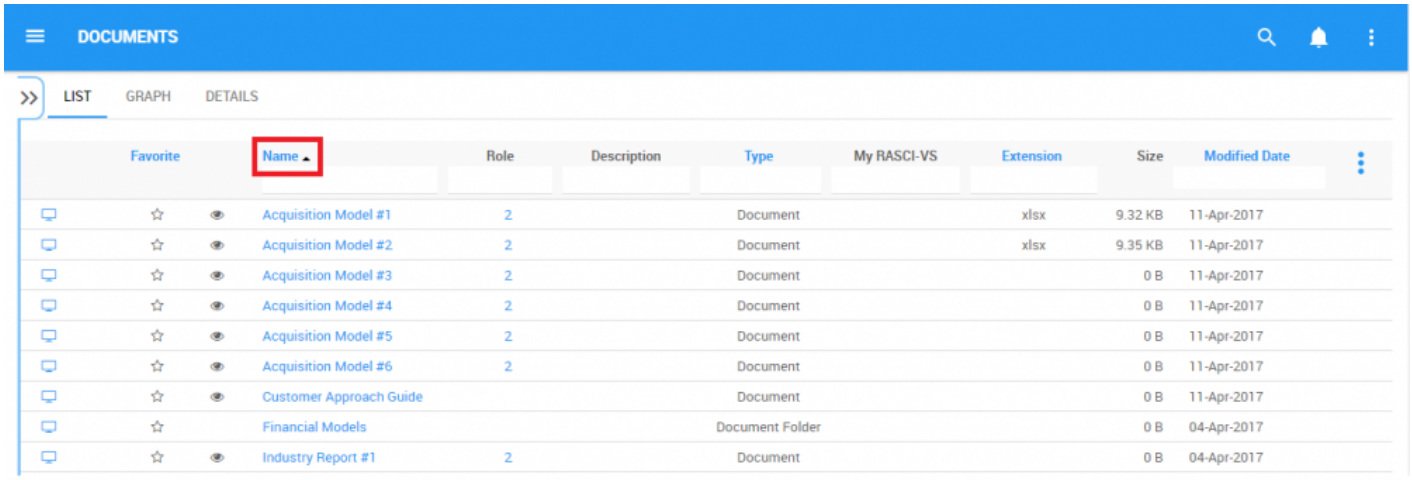
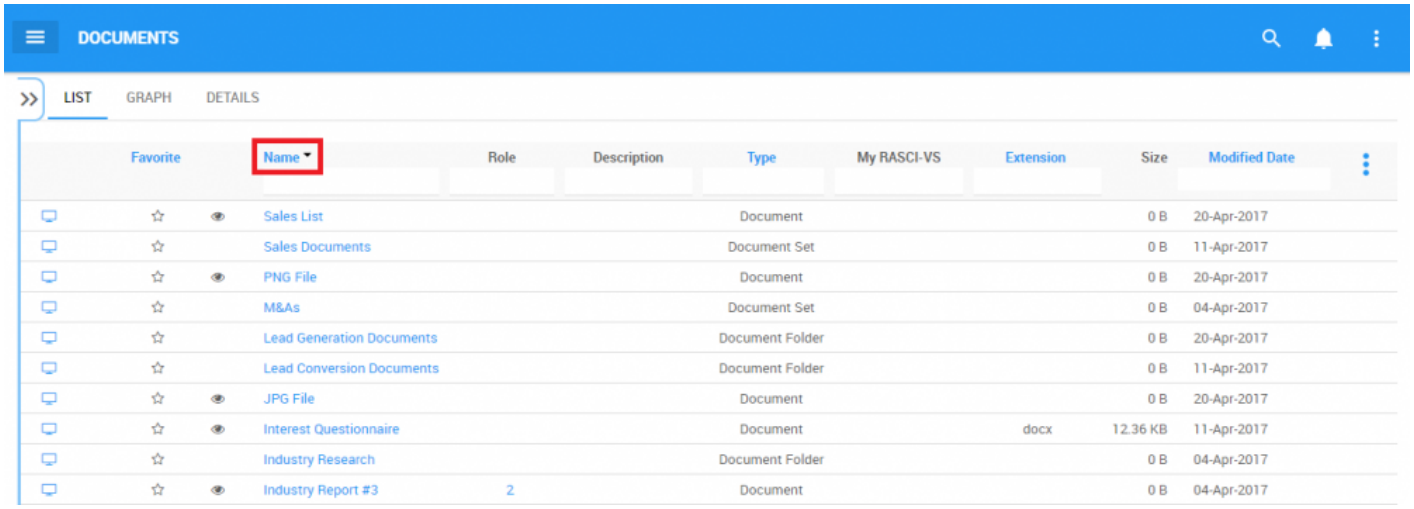
Ascending Example: The Name column is sorted in **ascending** order.



Descending Example: The Name column is sorted in **descending** order.



Multi-sorting (sorting multiple columns) is available.

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4.7.2.2 Filtering

Filtering is a useful way for you to extract a specific subset of EPC content based on conditions related to what you need to find.

You can filter the Document list by the following.

Column	Options
Role	Empty – The object has no associated roles Not-Empty – The object has at least one associated role
Description	Empty – The object has no written description Not-Empty – The object has a written description
Type	Document Document Set Document Folder
My RASCI-VS	Allows users to filter documents based on the RASCI-VS Matrix
Modified Date	The specific dates that things have been modified by

The Filtering section will cover the following:

1. How to Add Filters
2. How to Remove Filters
3. How to Combine Filters

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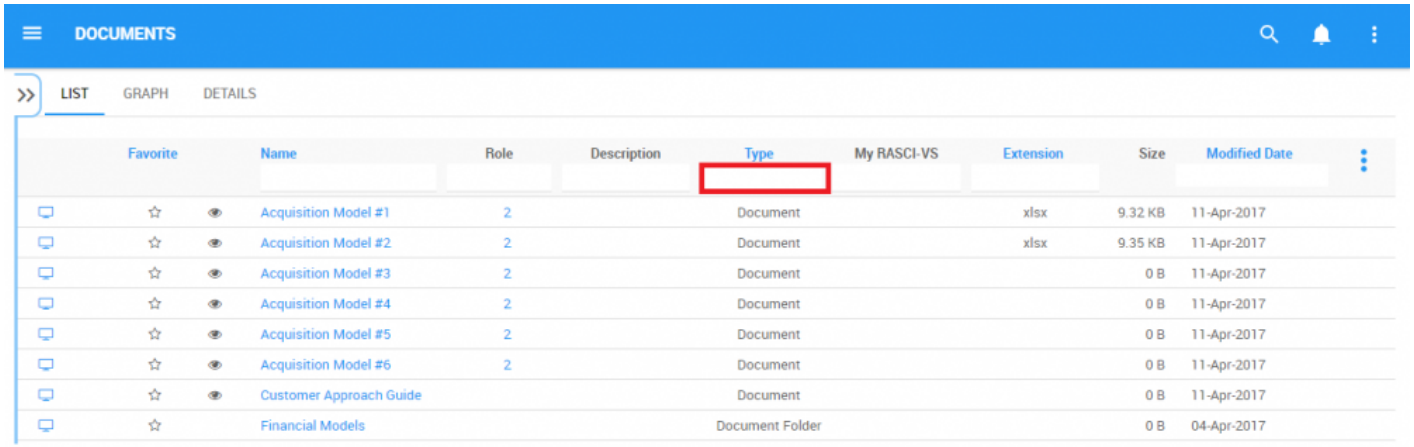
4.7.2.2.1 Add Filter

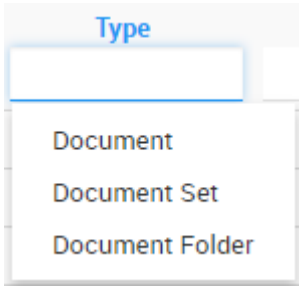
You can add filters to see items and other specific documents of your choice. **Type** what you are looking for, **select** the filter in the drop-down menu, or **define the range of dates.**

How to Add Filter

1. Navigate cursor and select the box column you wish to filter. For this example, we will use **Type.**



2. Select the box, which will generate a drop down menu



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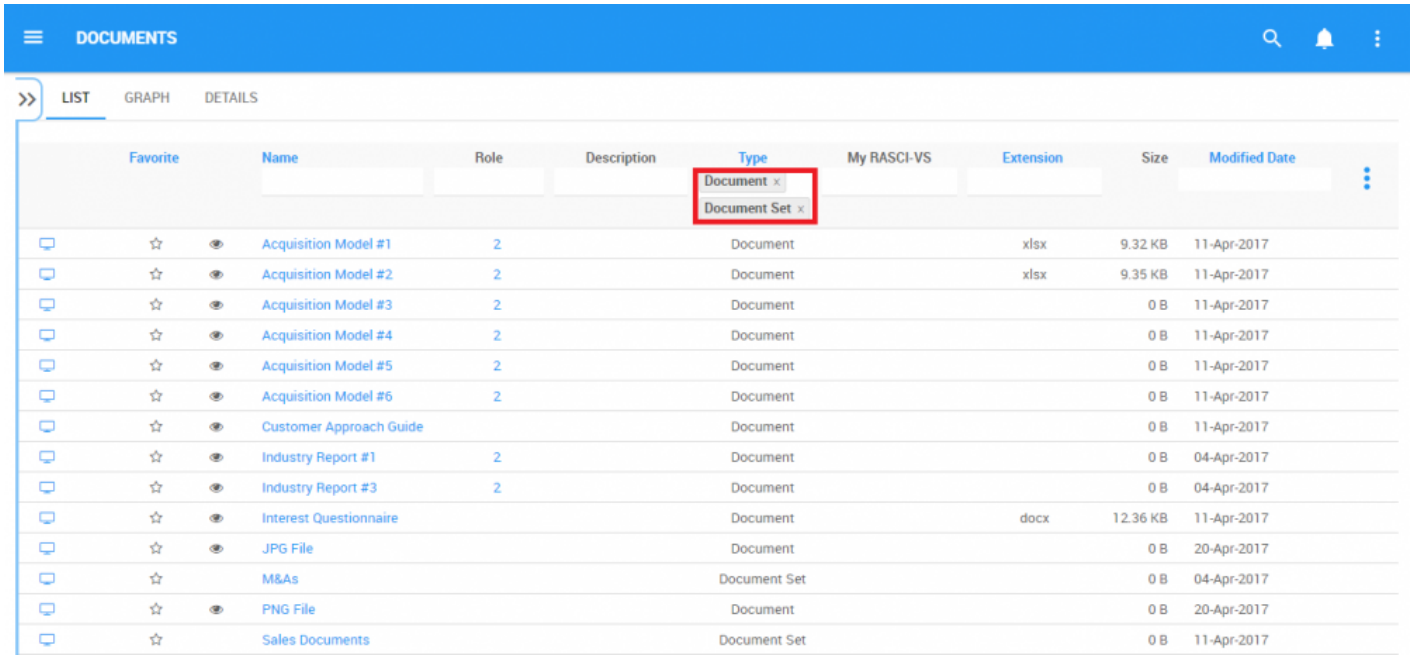
3. Select the desired filter. For this example, we will select **Document** and **Document Set.**



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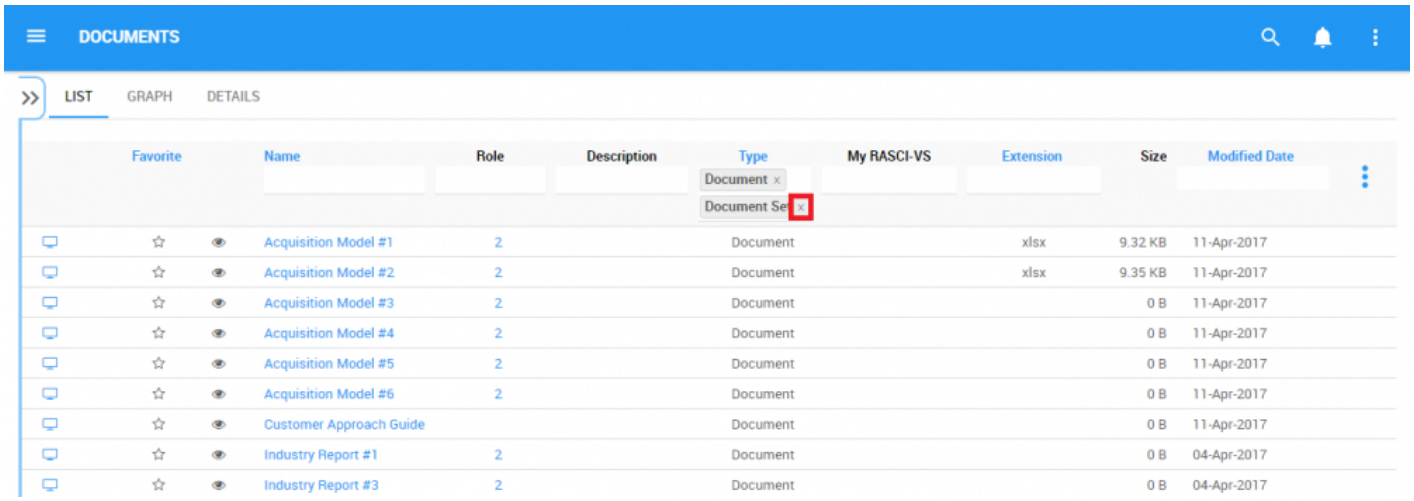
4.7.2.2.2 Remove Filter

You can remove filters; this will naturally increase the results in your list. See below to know how to add filters.

How to Remove Filter

To do so, click on the button beside the filter name.



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4.7.2.2.3 Combine Filter

You can combine filters, meaning you can add any other column filter to isolate results. See above to see how to **add** filters.

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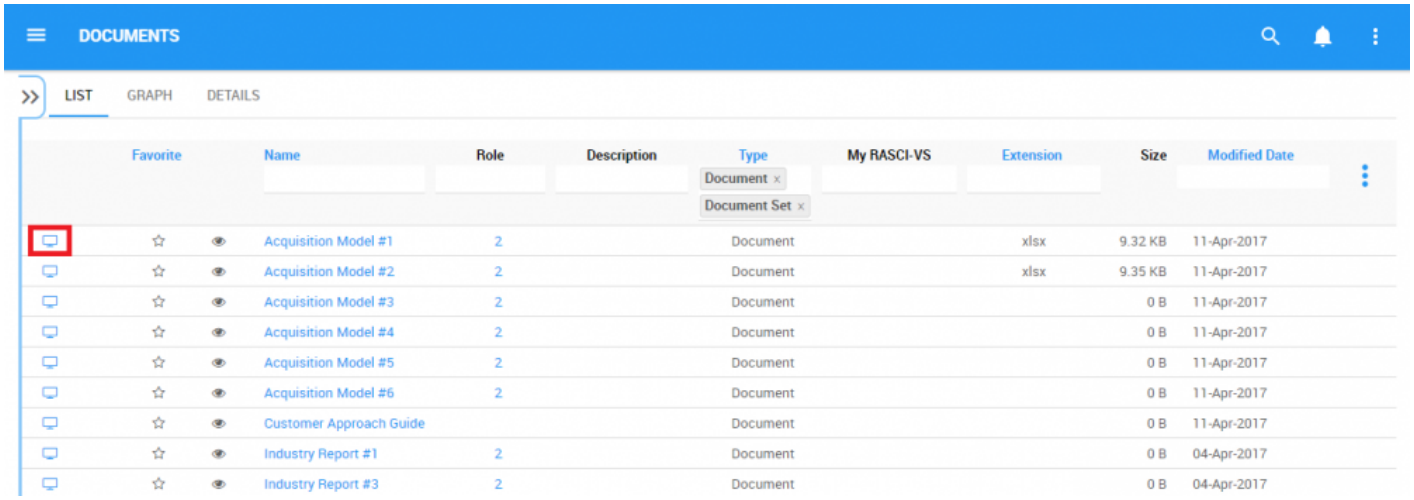
4.7.2.3 Quick Graph View

Quick Graph View is a feature of the EPC Web App that allows users to immediately view documents in a graph mode. While Graph's will be further explained below, the Quick Graph View allows users to quickly navigate to a Graph from "List View".

Please see the instructions below:

1. Navigate to Documents Module

2. Once in List View, click on the button in the left hand column of the document you'd like to see in Graph View.



3. You will be redirected to the "Hierarchy Graph" page of the selected object

Please see Graph section below for further details on Graph navigation, viewing and customization.

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4.7.3 Graph

Graphs are used as a visual representation of Documents. Graphs allow organizations and users to map out their Documents and provide key stakeholders with necessary information. They provide users with a high-level overview of Documents, and which areas of the organization are responsible for the particular documentation.

The following will be covered in the Graph section:

1. **Graph Navigation**
2. **Graph Types (Impact, Hierarchy)**

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4.7.3.1 Graph Navigation

Understanding how to navigate to graphs and how to navigate within graphs allows users to fully utilize the EPC. Users can navigate to Graph View by using the “Quick Graph View” icon, or by manually navigating to Graph View.

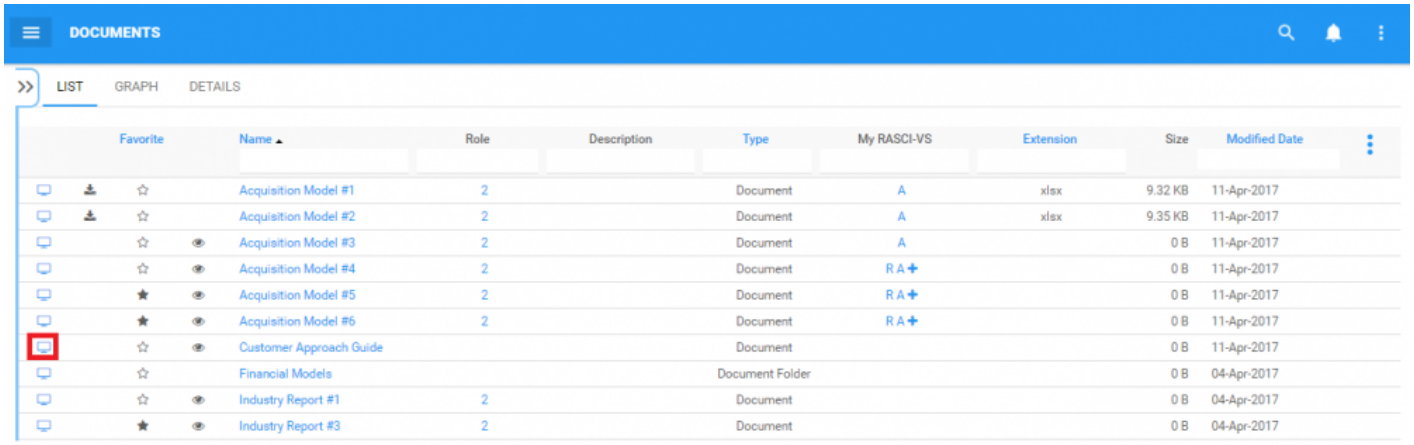
This section will outline Manual Navigation. Please see Quick Graph View section above for alternative navigation options.

How to navigate to the Graph section (Manual Navigation)

1. Click on the **Navigation Menu Button** on the top left of your screen.

2. Click on **Documents**

3. Select the icon of the item you desire to select



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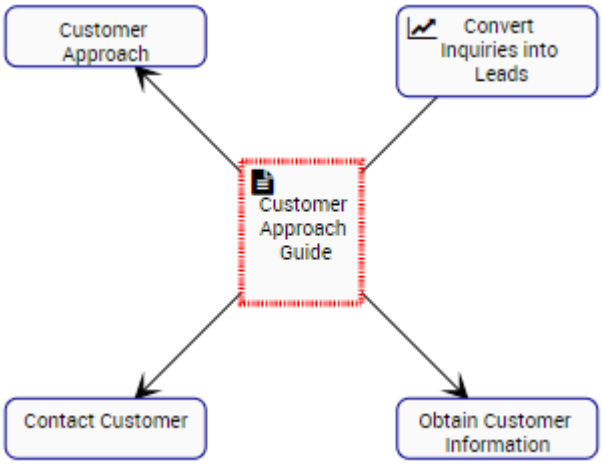
4. By default, users will be sent to Impact view as the default Graph view. An example of this view can be seen below.



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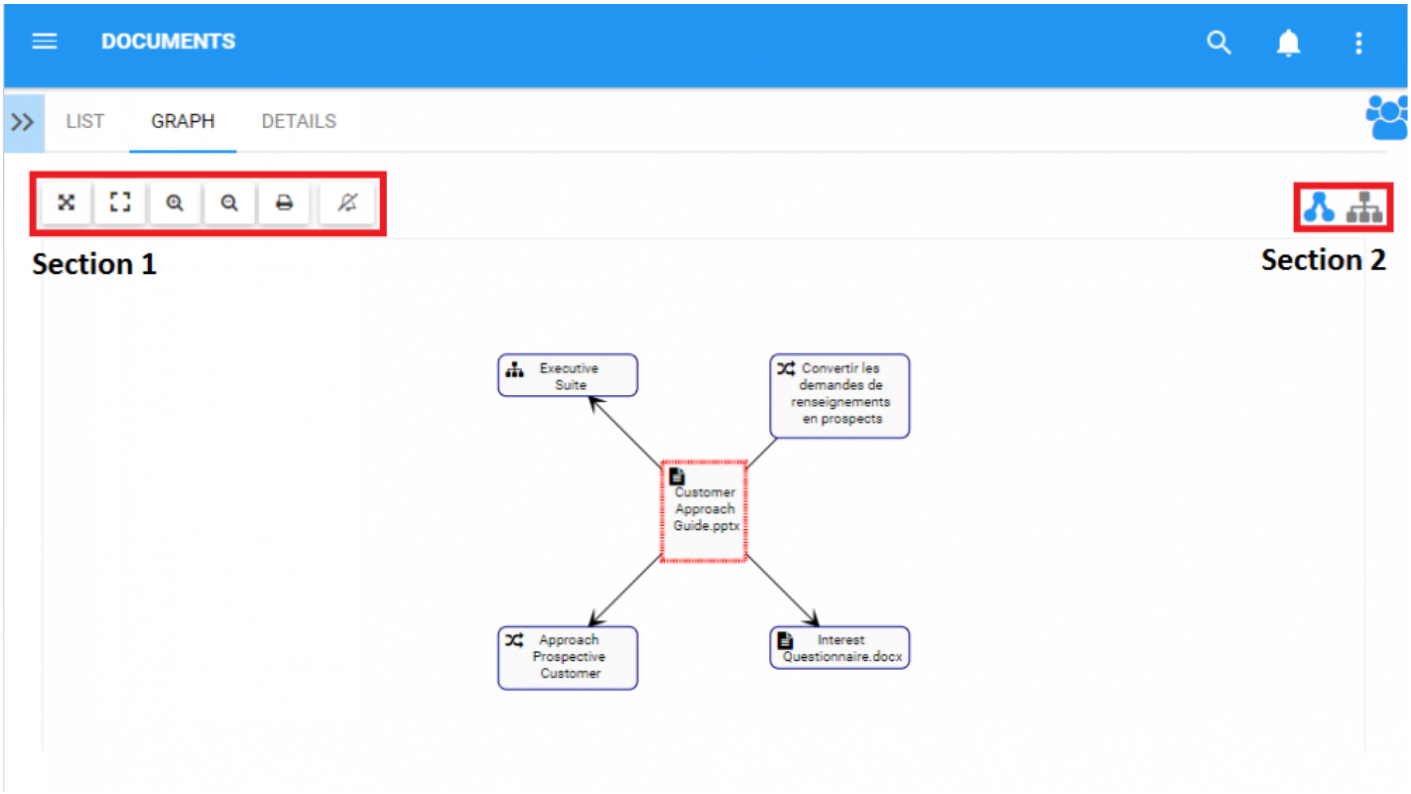
4.7.3.1.1 Navigating In Graphs

Navigation within the graph section is primary controlled by the toolbar at the top of the page. The toolbar is divided into 2 sections.



Section 1: items are focussed on user viewing and graph functionality. Please see the table below for a full list and description of each item.

Item	Icon	Description
Fit Screen		This button will center the selected Document on the users screen
Full Screen		This button will enlarge the item and fit a large-scale view to the users screen
Zoom In		This button will allow a user to zoom in to better view an item or item
Zoom Out		This button will allow a user to zoom out to better view an item or item

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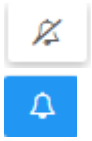
Print		This button will allow a user to print the graph being viewed
Subscribe		This button will allow a user to subscribe to the document being viewed. The icon will be displayed in white when a user is **not subscribed** to an item The icon will be displayed in blue when a user is **subscribed** to an item.

Section 2: items are focused on Graph selection. Please see the table below for a full list and description of each item.

Item	Icon	Description
Impact Graph		Graph showing downstream representation of associated items
Hierarchy Graph		Graph showing a top-down view of items and how they fit within organizations

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4.7.3.1.1.1 Fit Screen

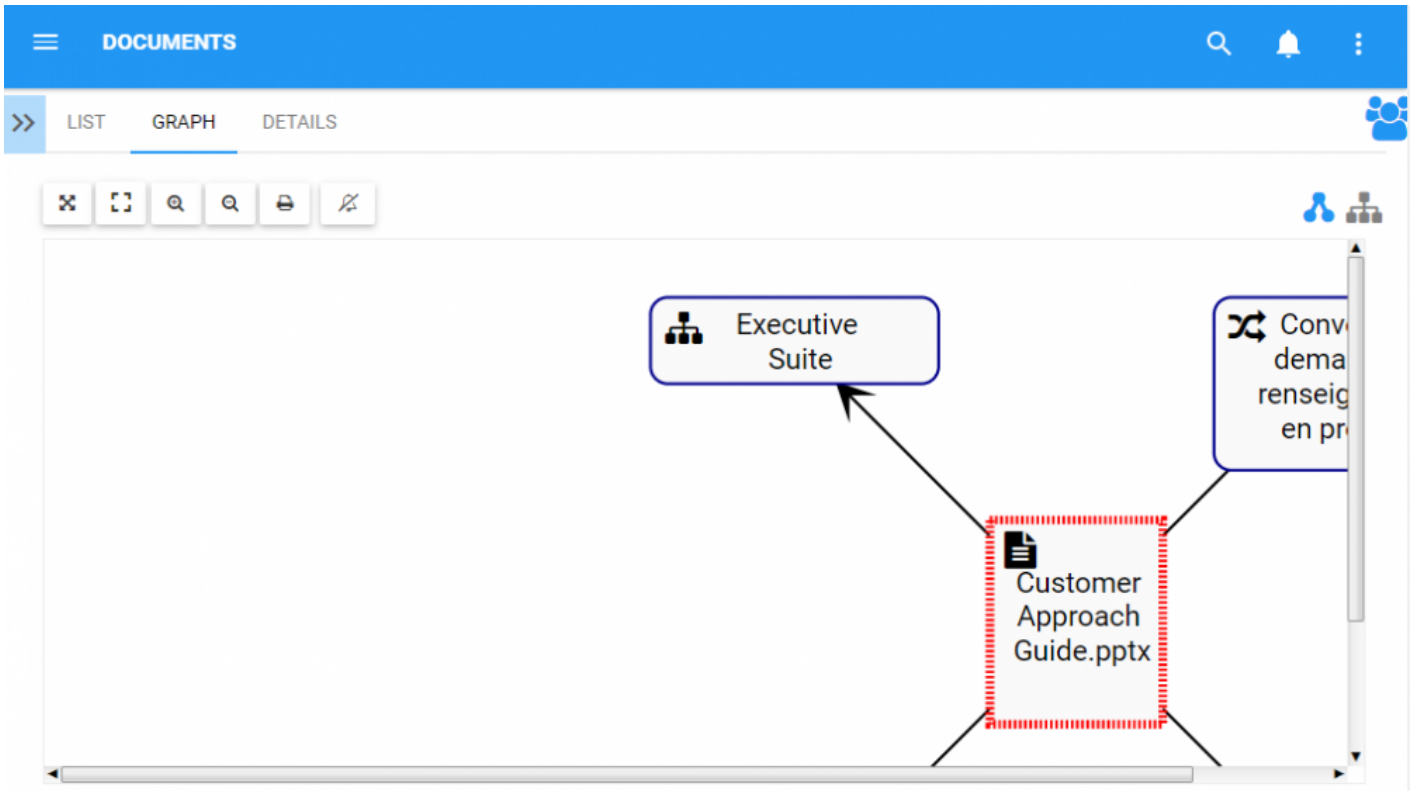
The fit screen function has been implemented to assist users at replacing and re-centering graphs.

To use the fit screen button, please see the following instructions.

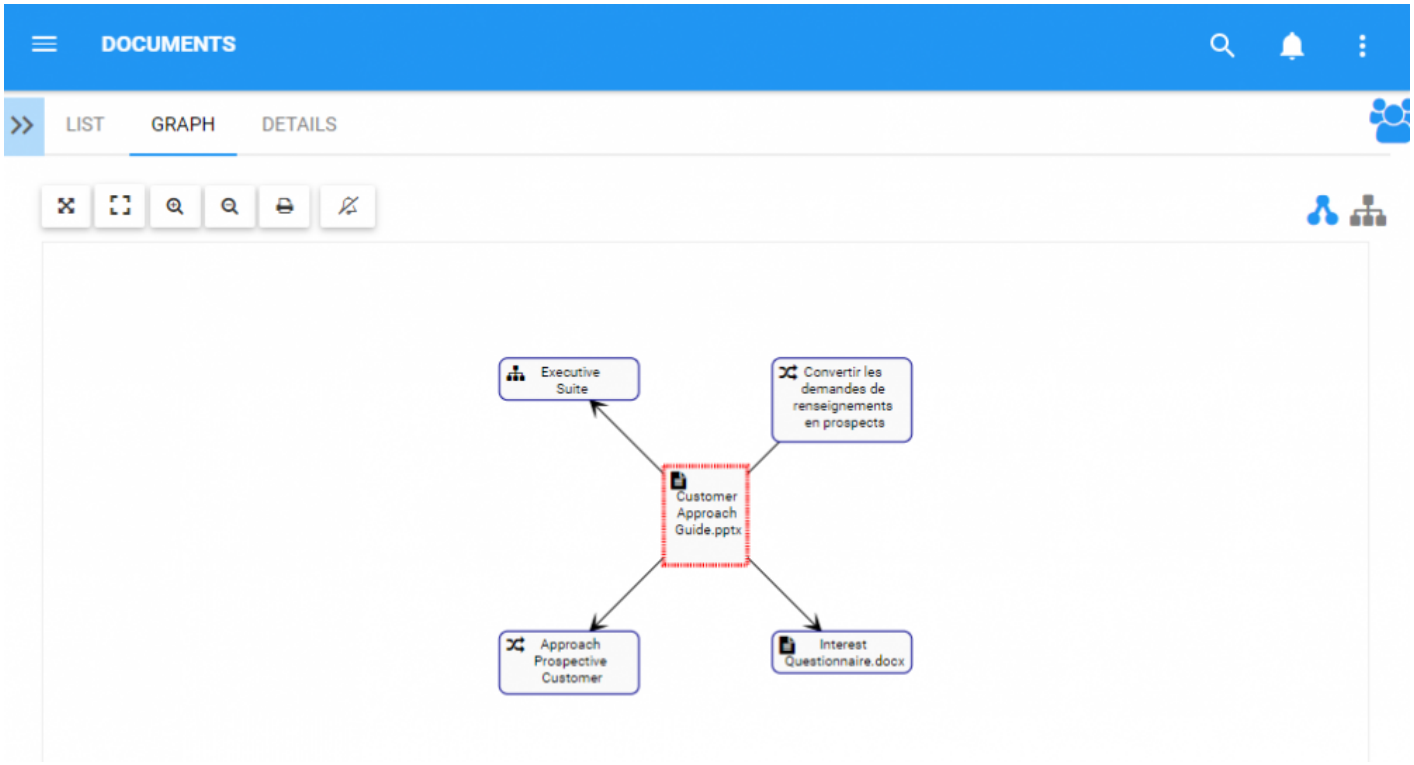
1. Navigate to a Document within the Documents Module

2. Click on the Quick Graph View icon

3. Alter the Graph (Zoom in, out or shift). Please see zoom instructions below for further details.



4. Click on button and the page will be reset

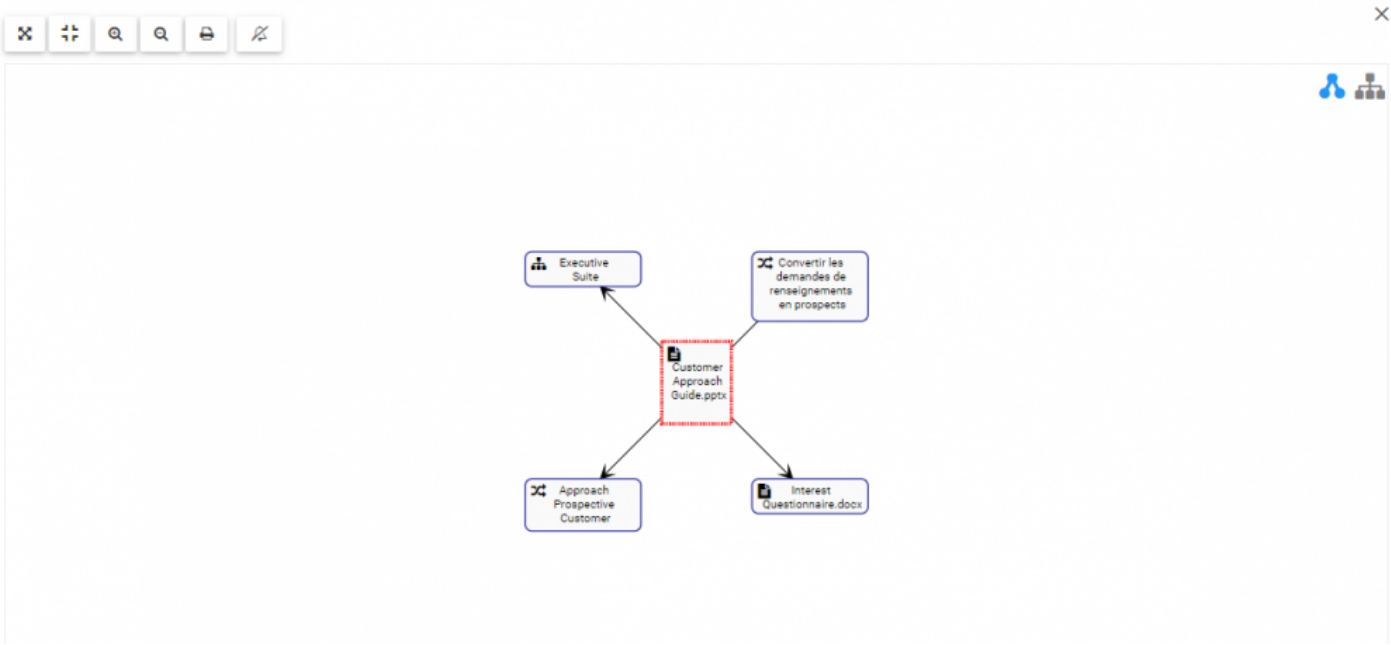


4.7.3.1.1.2 Full Screen

The fit screen function has been implemented to assist users at viewing Graphs, utilizing the full screen of a user.

To use the Full Screen button, please see the following instructions.

1. Navigate to a Document within the Documents Module
2. Click on the Quick Graph View icon
3. Click on button and the Graph will be set to “Full Screen View”



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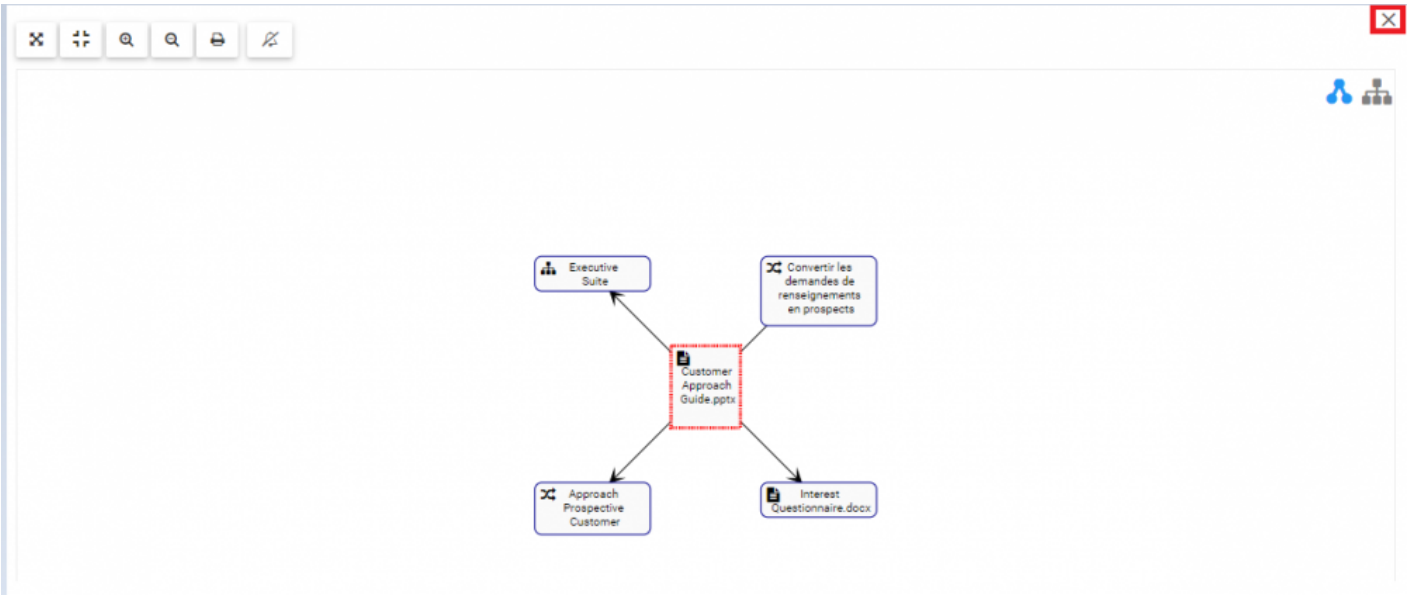
4. To close “Full Screen View” click on the ✕ on the upper right corner



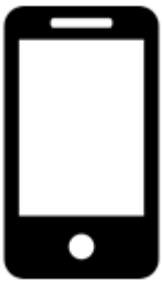
4.7.3.1.1.3 Zoom In

The zoom function has been implemented to assist users in viewing specific items within selected Documents.

To use the Zoom In button, please see the following instructions.

1. Navigate to a Document within the Documents Module
2. Click on the Quick Graph View icon
3. Select the Zoom in button
4. Repeat step 3 until reaching the desired Zoom

> Users can also use their mouse wheel to zoom in and out



Users can zoom in or out on mobile devices with the use of 2 fingers. Zooming In: Place two fingers on the screen and drag them in opposite directions until desired zoom is reached.

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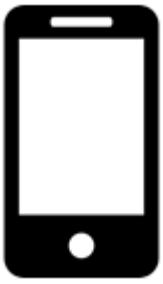
4.7.3.1.1.4 Zoom Out

The zoom function has been implemented to assist users in viewing specific items within selected Documents.

To use the Zoom Out button, please see the following instructions.

1. Navigate to a Document within the Documents Module
2. Click on the Quick Graph View icon
3. Select the Zoom out button
4. Repeat step 3 until reaching the desired Zoom

> Users can also use their mouse wheel to zoom in and out



Users can zoom in or out on mobile devices with the use of 2 fingers.
Zooming Out: Place two fingers on the screen and drag them towards one another until desired zoom is reached.

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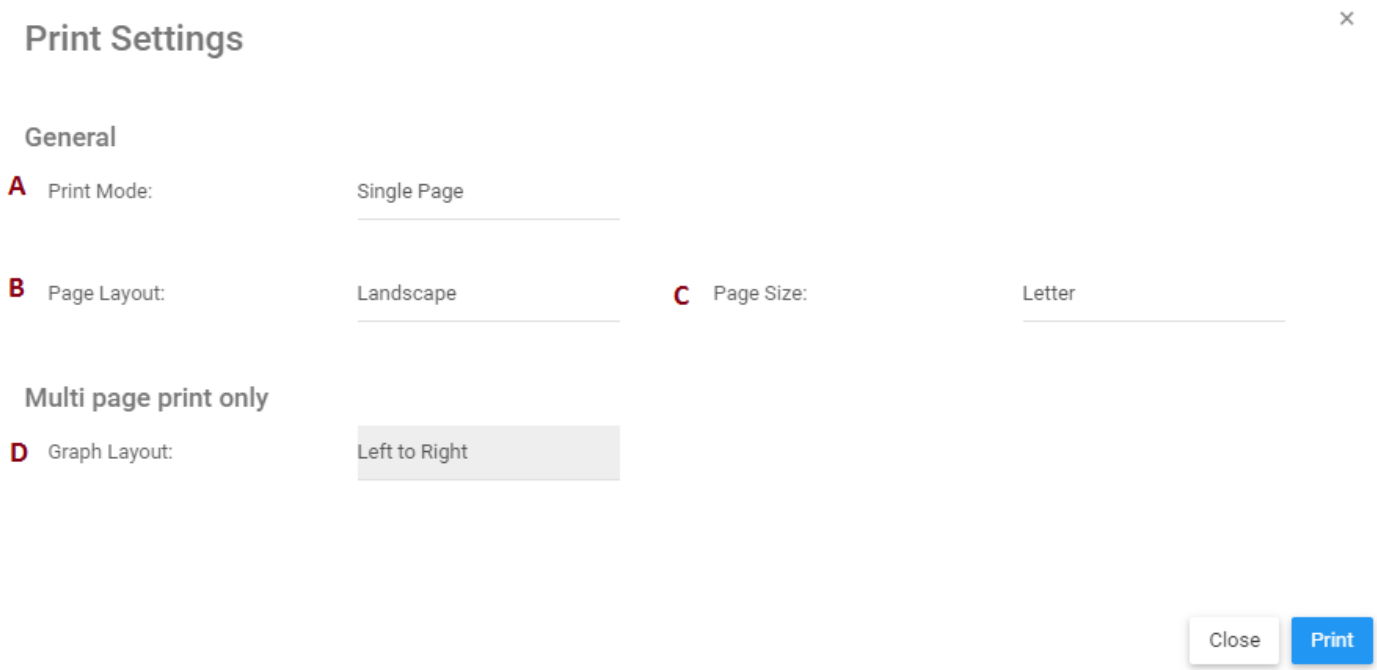
4.7.3.1.1.5 Print

The Print button has been added to allow users to easily print a desired graph.

To use the Print button, please see the following instructions.

1. Navigate to a Document within the Documents Module
2. Click on the Quick Graph View icon
3. Select Print button at the upper left corner of the page
4. A print settings menu will be generated on the user's screen



Setting	Options	Description
A Print Mode	a. Single Page b. Multi Page	Fit the displayed content over a single page Spread the displayed content over multiple pages
B Print Layout	a. Landscape b. Portrait	Landscape ("Sideways") page orientation Portrait ("Top-Down") page orientation
C Page Size	b. Legal c. A3d. A4	8.5 × 11.0 in 8.5 × 14.0 in

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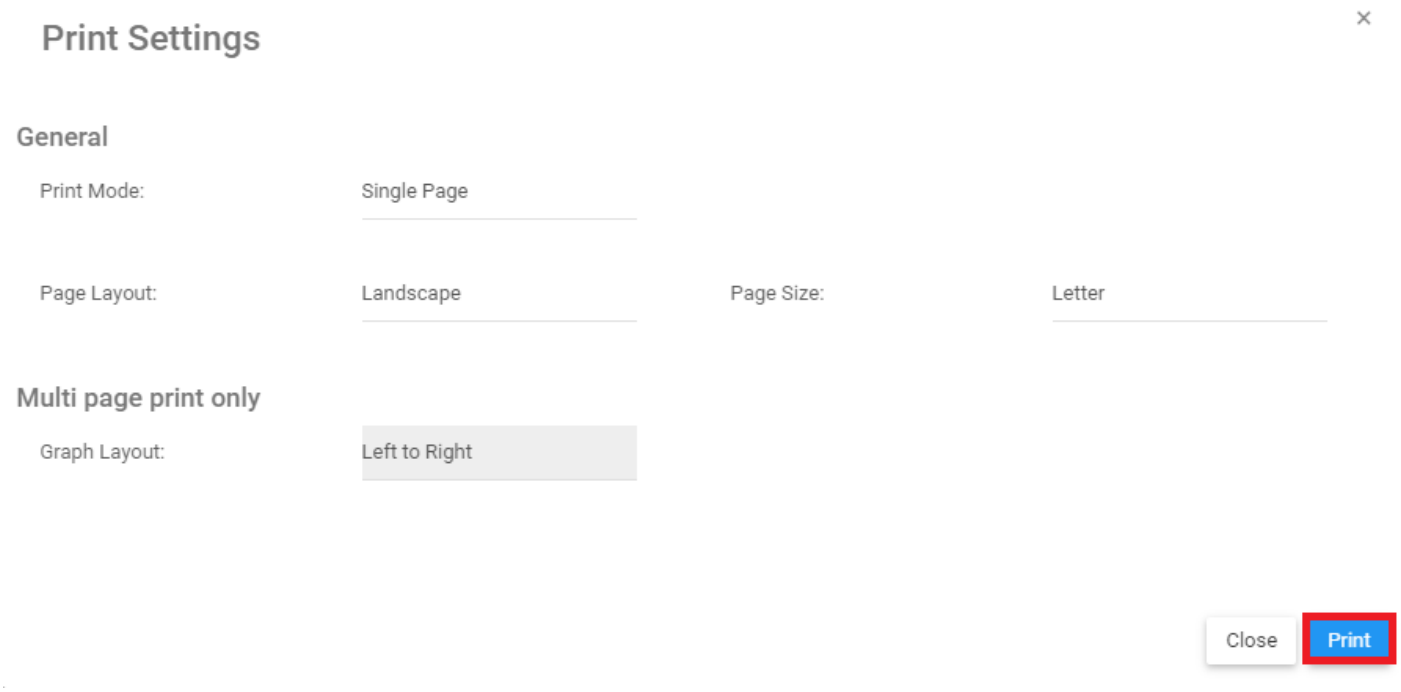
		30 × 42 cm 21 × 30 cm
D Graph Layout	a. Left to Right b. Top to Bottom	Sideways layout of graphic being printed (multipage) Top-down layout of graphic being printed (multipage)

5. Select desired print settings and click the print button at the bottom right corner of the window



4.7.3.1.1.6 Subscribe

The subscribe function, symbolized by the icon, has been added to allow users to track items, objects and processes in the EPC. Users can subscribe to specific items or processes to simplify and centralize monitoring activities. By subscribing to items, users will receive notifications when items or processes are altered or optimized. Additionally, item subscriptions is a useful filter and option for Home page Widgets, allowing users to create Widgets specifically featuring items they deem as critical to their individual jobs.

The subscribe button can be found on all item pages, in both Graph and Details sections.

To use the Subscribe button, please see the following instructions.

1. Navigate to a Document within the Documents Module
2. Click on the Quick Graph View icon
3. Select Subscribe button at the upper left corner of the page
4. The button will change color to , symbolizing that a user is now subscribed to the item in question.

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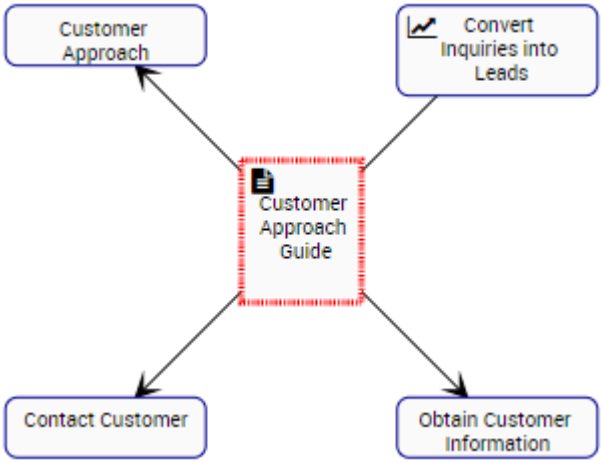
4.7.3.2 Impact Graph

Impact Graphs provide a visual representation of the upstream and downstream associations related to items in the EPC. In simple terms, Impact Graphs show users what items are associated to one another. Seeing the different associations within an organization allows users to better understand the complexity or certain business activities, as well as the true effect of changes within the organization.

Impact Graph



The example features the Impact Graph of the “Customer Approach” Document. The Document itself has 3 processes (Customer Approach, Contact Customer and Obtain Customer Information), as well as a KPI (Convert Inquiries into Leads) associated with it. The specific nature of the items associated is denominated by the icon featured next to the name of the items.

The Graph provides an initial visual representation of items that directly impact one another. Users can additionally expand the Impact Graphs to view indirect associations.

Users can **double click** on specific items within the Impact Graphs, which will display the associations to

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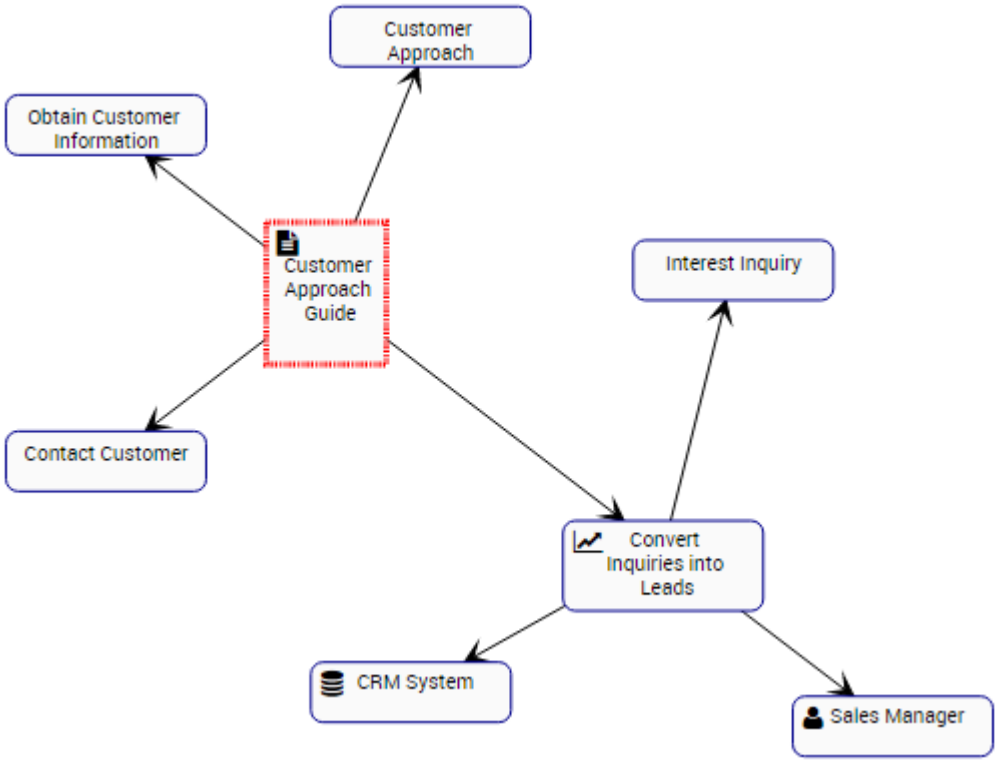
that item.



These Impact Graphs can be used to educate business users, to analyze internal business processes and help management optimize activities effectively. Additionally, they help in the preparation of change management plans, allowing managers to map out the effect of any organizational change.

Impact Graph Navigation

To navigate to Impact Graphs, please see the following instructions.

1. Navigate to a Document within the Documents Module

2. Click on the Quick Graph View icon

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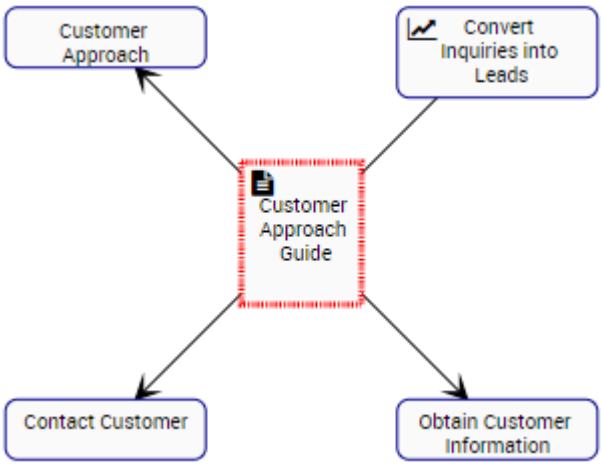
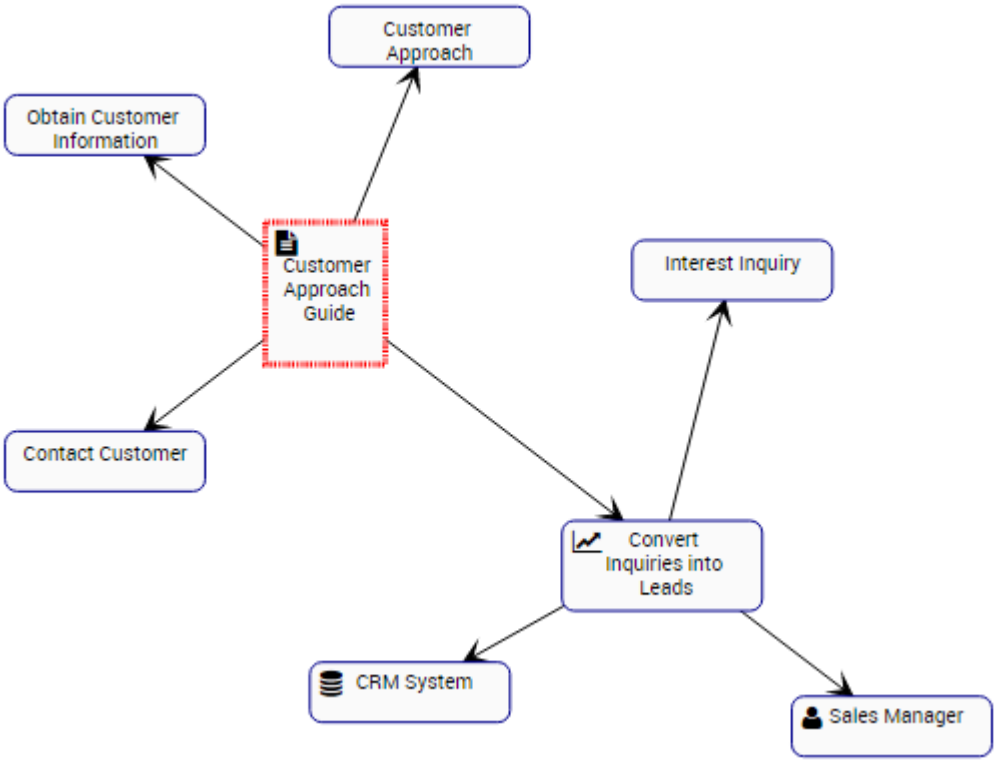
3. You will be navigated to the specific item's Impact Graph



4. (Optional) To further expand the Impact Graph, simply double-click on the item which you would like to display



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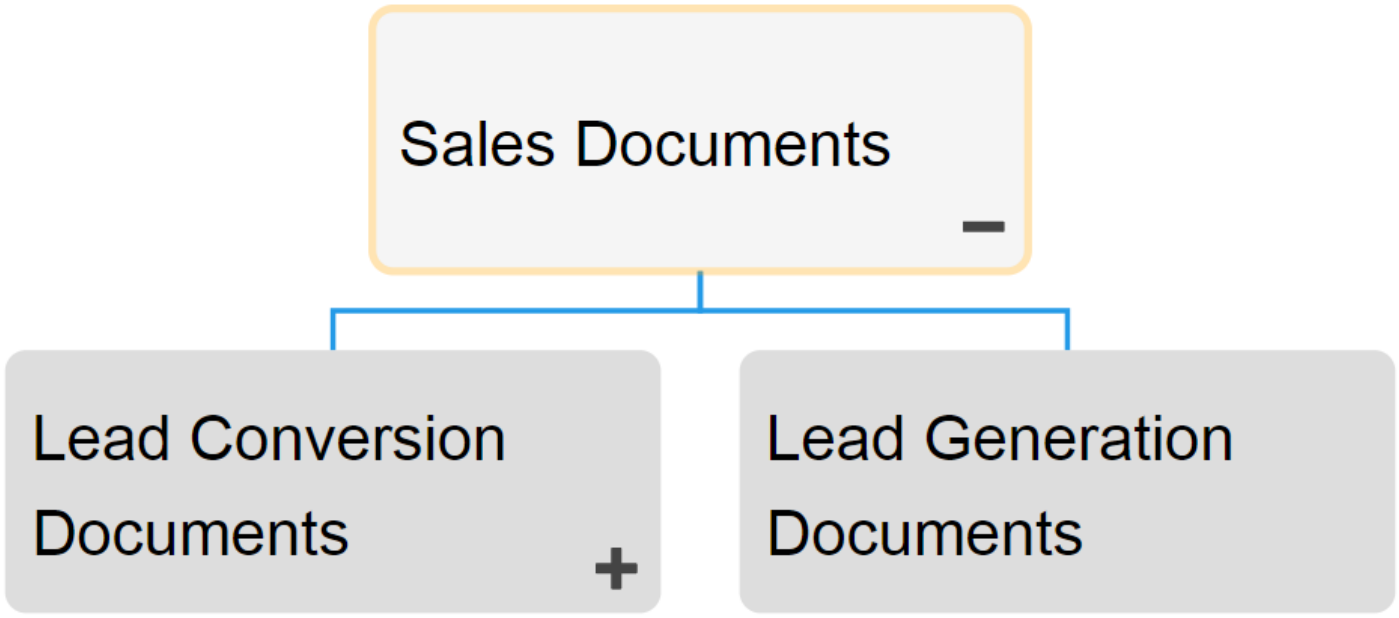
4.7.3.3 Hierarchy Graph

Hierarchy Graphs allows users to view the vertical and horizontal hierarchy of Folders and Documents This view provides users with a graphical representation of where specific Documents fit within the overall organization. This allows organizational users to understand organizational documentation and gauge complexity of business activities.

Users can expand and close item sets easily, allowing users to view a high-level organization structure, and expand sections they wish to gain further information on.



Hierarchy Graph Navigation

To navigate to Hierarchy Graphs, please see the following instructions.

1. Navigate to Documents

2. Select the item to which you would like to view.

> The further you navigate, the more you limit the scope of Hierarchy Graphs. To view a complete picture of organizational structure, select items listed as “Document Folders or Document Sets” in List View

3. Select the Quick Graph View icon of the desired item

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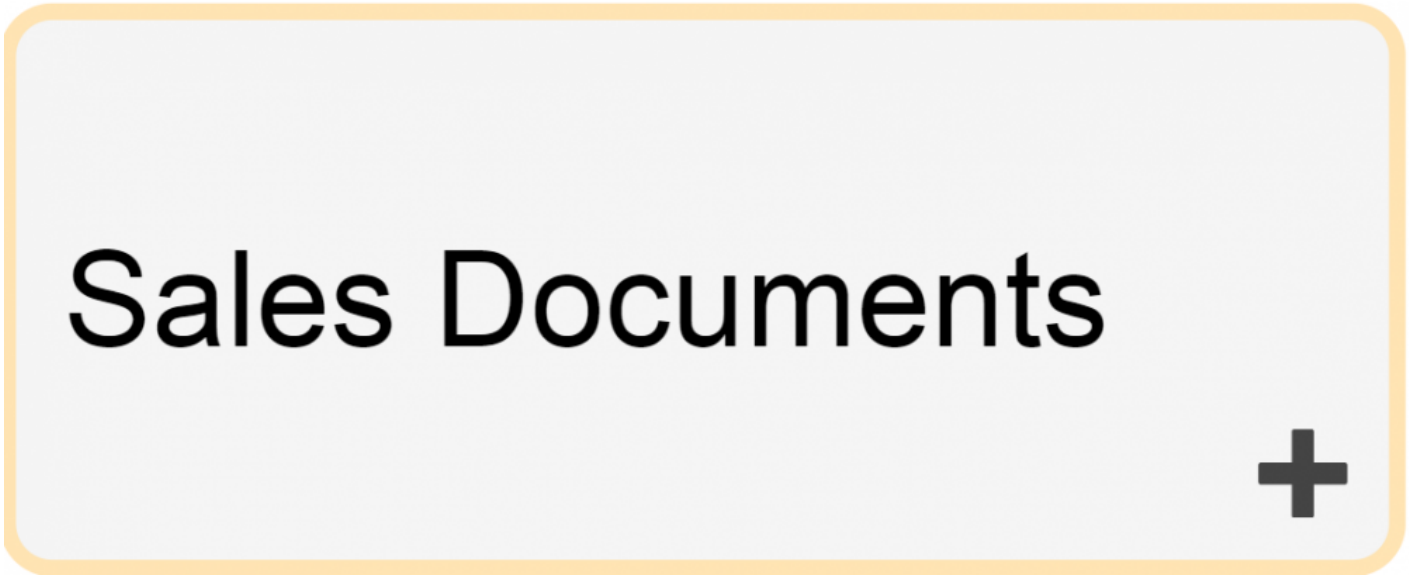
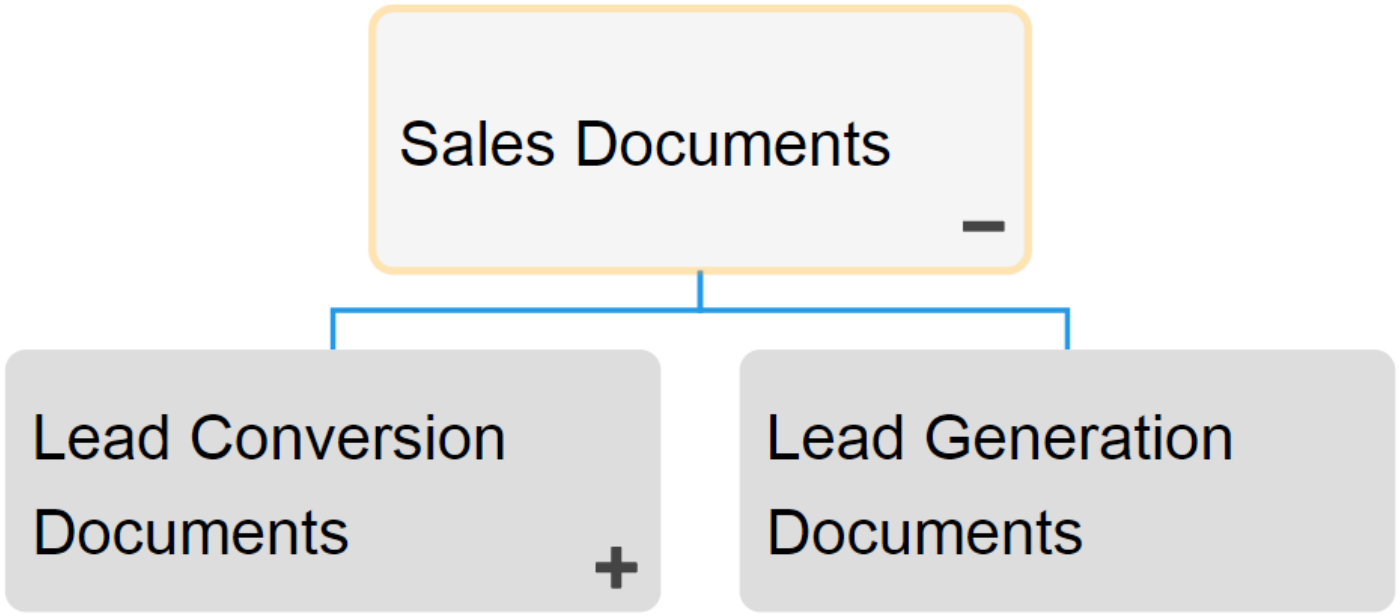
4. Please select the Hierarchy Graph icon

5. You will be navigated to the “Document Sets” Hierarchy Graph. The entire set will not be fully displayed upon initial navigation and will display the individual item selected.



6. To further expand components of the Hierarchy Graph, double click on the on the objects in the Graph. This will expand the item selected.



7. Repeat step 5 until you reach the desired depth.

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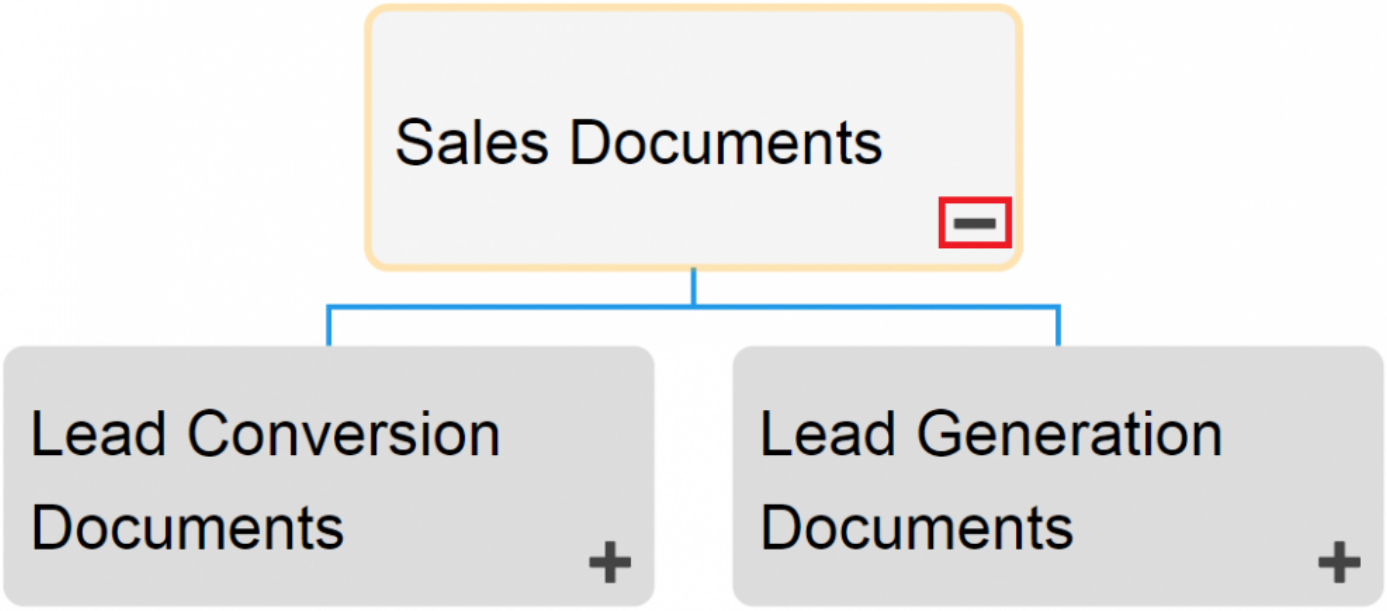
8. To close opened items, double-click on the icon



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4.7.4 Details

The Description section is where you will find details about the Documents you are observing. This rich text area allows for the display of all additional details that has been uploaded regarding the item in particular. These details provide users with all critical information about items that has been uploaded by EPC Modelers.

The details section is where users can see all information about items.

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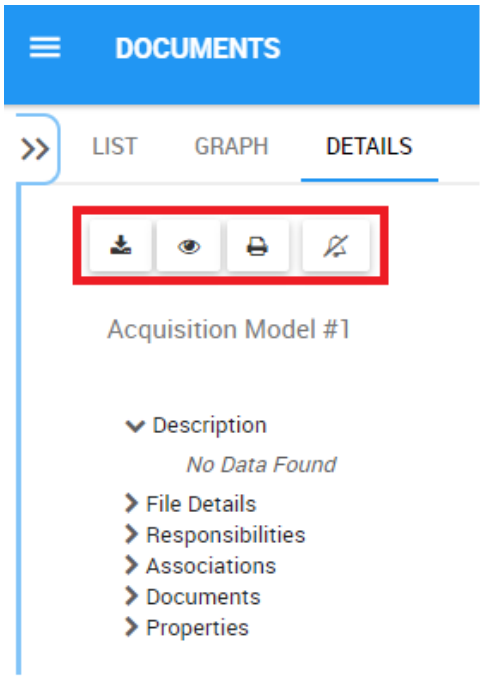
4.7.4.1 Navigation

Users can navigate between items using the toolbar at the top of the page. Further details can be found in the toolbar section below.

The Toolbar features the following items:

1. Download
2. Preview
3. Print
4. Subscribe



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4.7.4.1.1 Toolbar

The toolbar provides users with a variety of functions to navigate and leverage the details page.

Item	Icon	Description
Download		Allows users to directly download the item they are viewing
Preview		Allows users to generate a preview window to preview the document in question
Print		This button will allow a user to print the details page being viewed
Subscribe		This button will allow a user to subscribe to the document being viewed. The icon will be displayed in white when a user is not subscribed to an item The icon will be displayed in blue when a user is subscribed to an item.

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4.7.4.1.1.1 Download

The download button allows users to quickly access files within the EPC at the touch of a button. Selecting the download button will prompt the file to be directly download onto a user's device, which call facilitate editing and offline viewing.

Downloading a document is the main recommended document format view.

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4.7.4.1.1.2 Preview

The preview function allows users to quickly view a document to assess whether or not it corresponds with the document they are searching. Preview is a useful tool and can be used when an individual is searching for a file that the user does not recognize by name.

> ✻ The preview functionality is dependent on file size and complexity. This means that the more complex and large a file is, the longer the preview will take to generate. For complex files, it is recommended that users simply download.

Documents Available for Preview:

PDF Files	Available with extension Adobe Acrobat	Available with extension Adobe Acrobat	Available with extension Adobe Acrobat	Available with extension Adobe Acrobat	Available with extension Adobe Acrobat
Image Files • Png • Jpeg, jpg • Gif • Svg, svgz • Tif, tiff • Wbmp • Webp • Ico • Jng • bmp	Available (all)	Available (all)	Available (all)	Available (all)	Available (all)
URLs	Available	Available	Available	Available	Available
File Links	Available with extension Local Links	Available with extension Local Filesystem Links	Available if Trusted Sites added*	Unavailable	Unavailable

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MP3	Available	Available	Available	Available	Available
MP4	Available	Available	Available	Available	Available
Wav Files	Available	Available	Unavailable	Available	Available
Ogg Files	Available	Available	Unavailable	Available	Unavailable

PDF FILES

In order for users to enable PDF File previewing, users will need to download the Adobe Acrobat Extension for their browser. The download links for browsers can be found below:

Browser	Link
	https://chrome.google.com/webstore/detail/adobe-acrobat/efaidnbmnnnibpcajpcglclefindmkaj?hl=en
	https://get.adobe.com/reader/
	https://get.adobe.com/reader/
	https://get.adobe.com/reader/
	https://get.adobe.com/reader/

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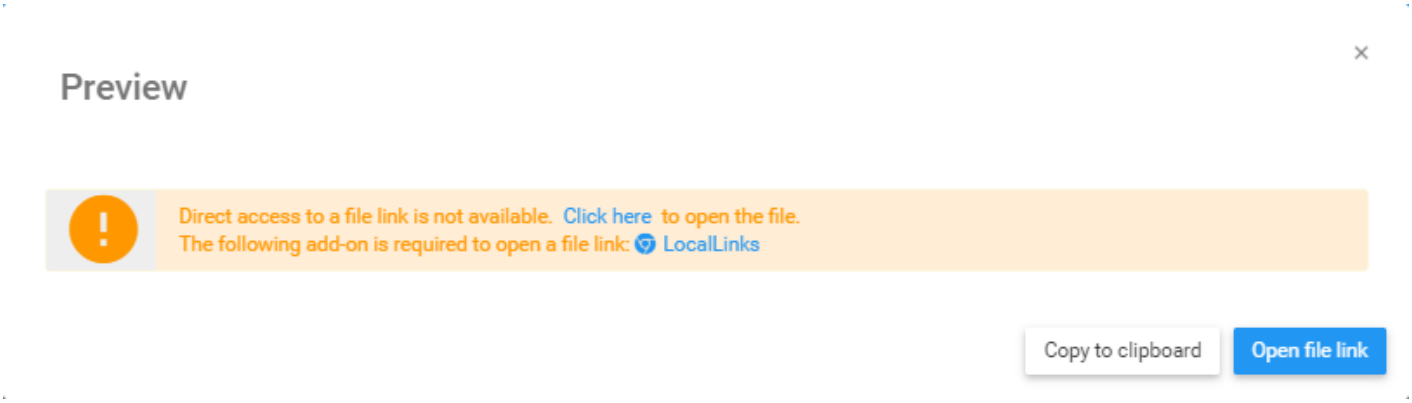
PREVIEWING DOCUMENTS

Please see the steps below to preview documents:

1. Select the preview icon of the document you wish to preview

2. Selecting the preview icon will generate a pop-up window



3. If the document being previewed requires an extension, this window will remind users of the necessary add-ons required (e.g. LocalLinks for Chrome) to preview the document.

4. Simply click the button to proceed.

The preview function will only work successfully if the document type is supported and if the user has downloaded the appropriate extensions.
If a user has not met these conditions, the file will automatically download instead.

FILE LINKS

Previewing Files Links is available on Chrome, Firefox and Internet Explorer web browsers. Chrome and Firefox require plugin downloads, while Internet Explorer requires browser setting manipulation. Further detail will be provided below.

Chrome

Chrome users are required to download the LocalLinks plugin.

Users can download this extension here:

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https://chrome.google.com/webstore/detail/locallinks/jllpkdkcdjndhggodimiphkghogcpida?utm_source=chrome-app-launcher-info-dialog

Firefox

Firefox users are required to download the Local Filesystem Link plugin.
Users can download this extension here:

https://addons.mozilla.org/en-US/firefox/addon/local-filesystem-links/

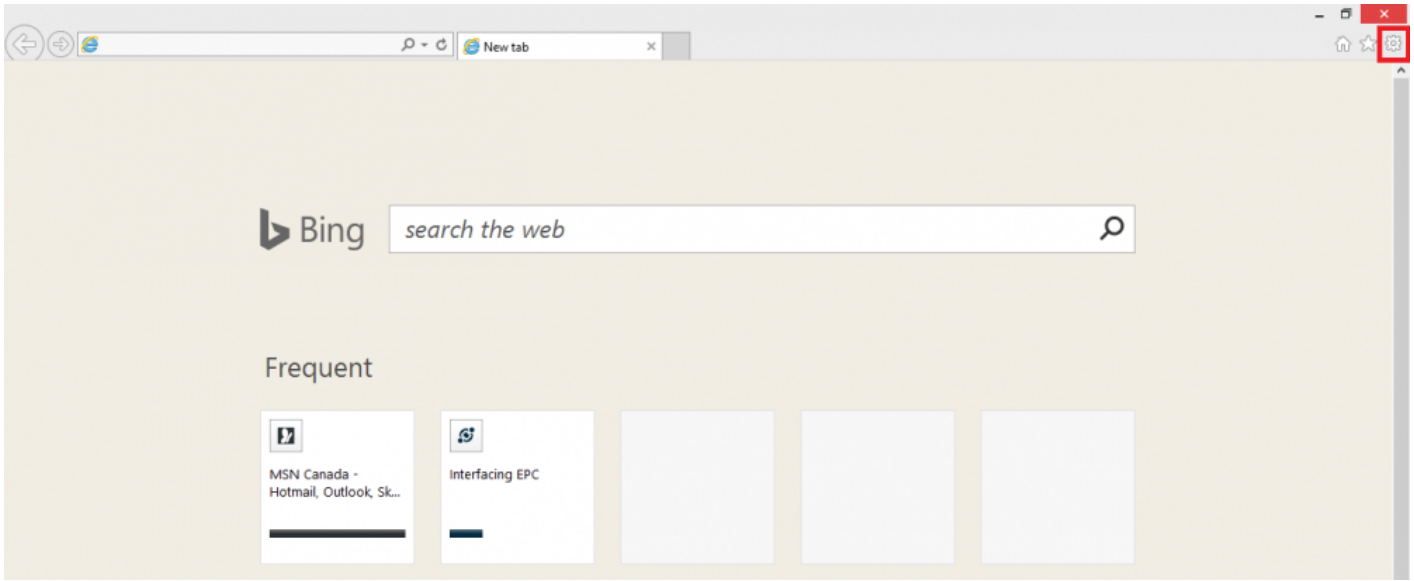
Internet Explorer

Internet Explorer users must adjust their browser settings to enable File Link previews.

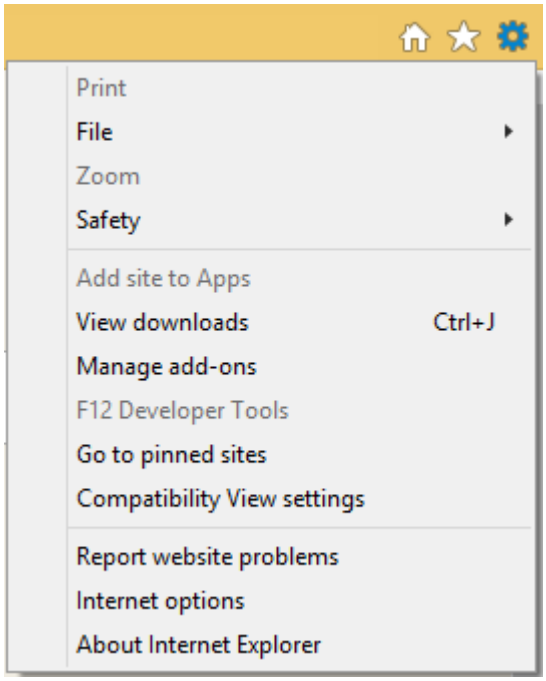
Please see the steps below:

1. Open Internet Explorer

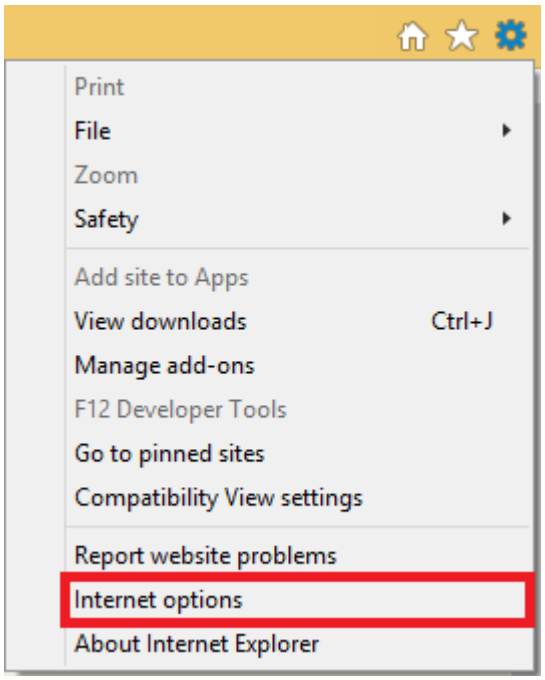
2. Select the settings icon



4. This will generate a drop-down menu



5. Select “Internet options”



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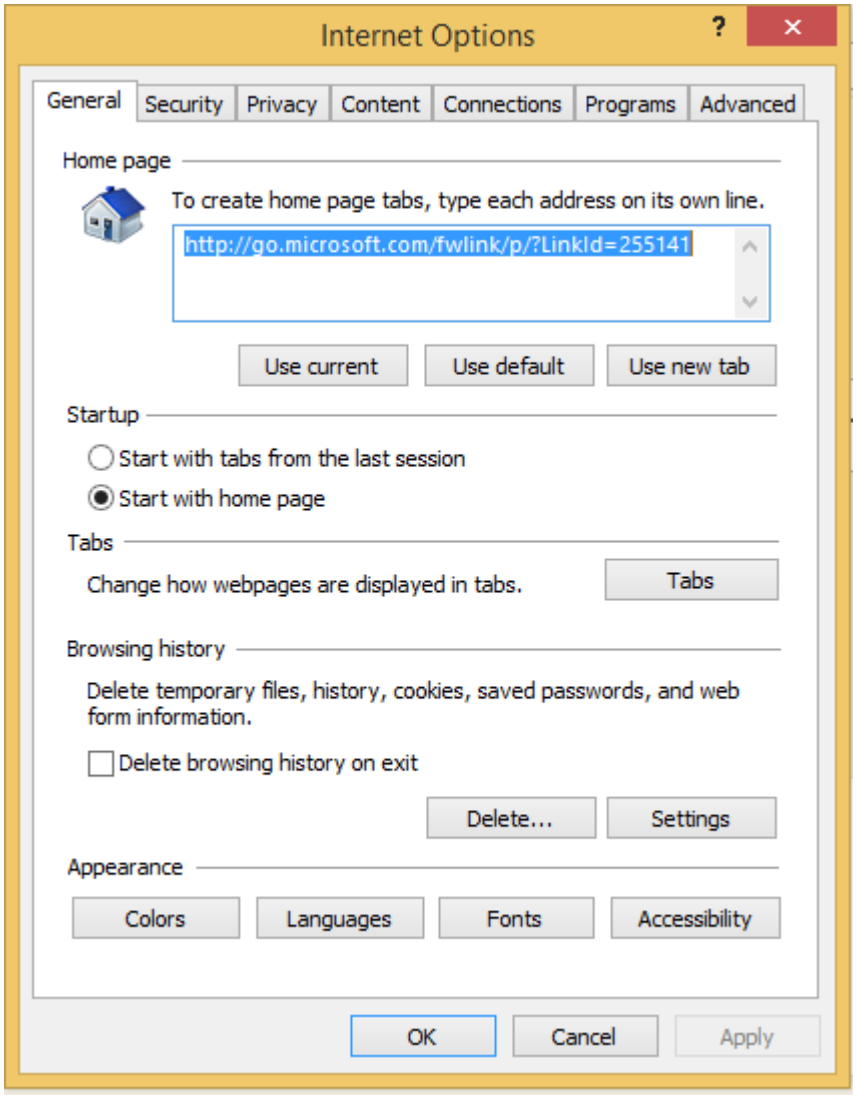
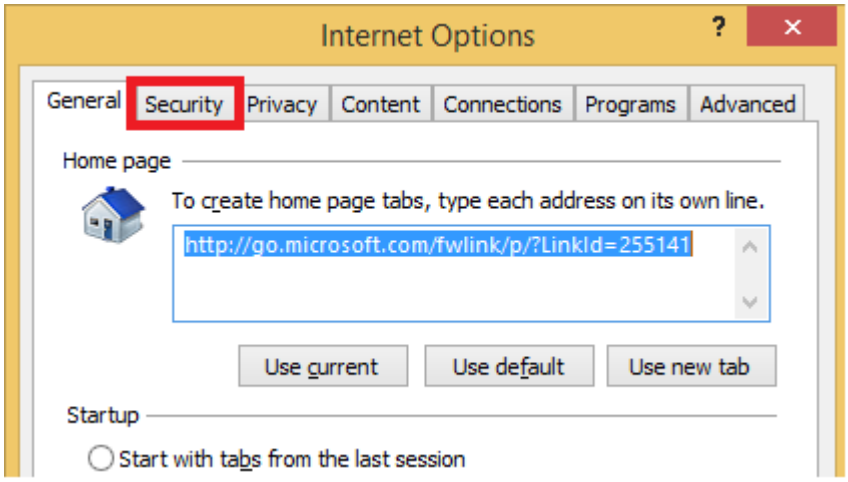
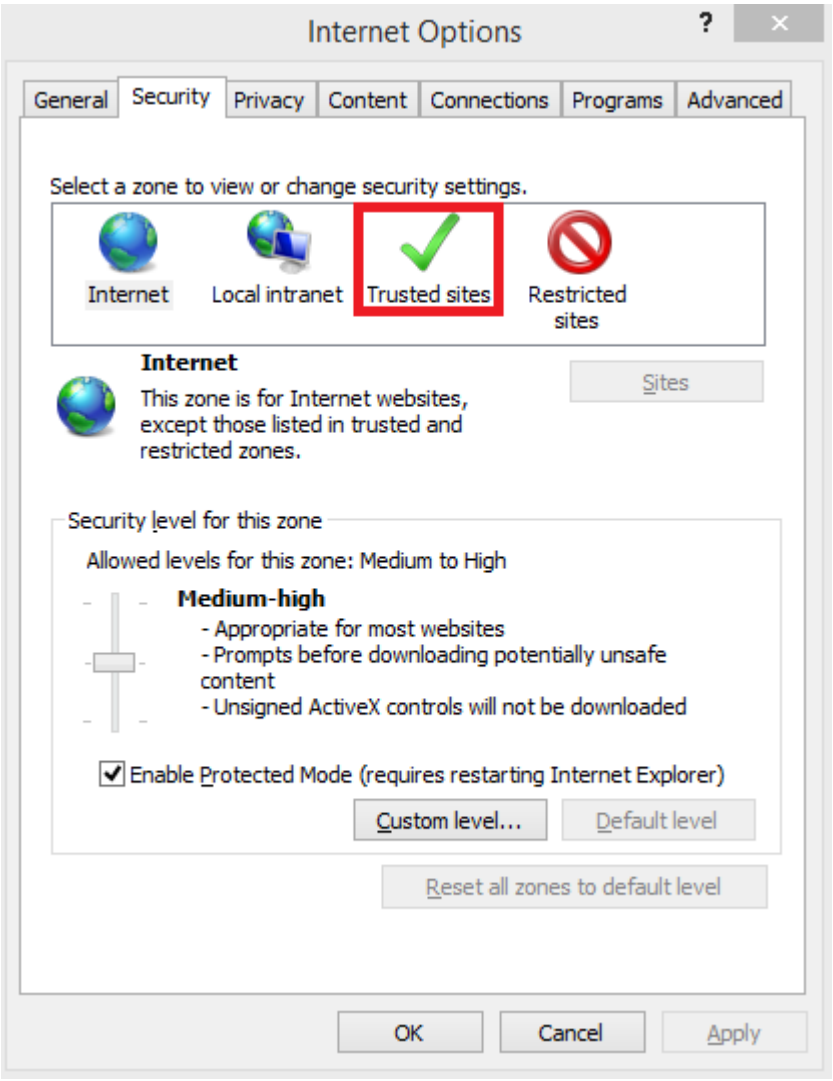
6. This will generate the following pop-up window



7. Select the Security tab



8. Once you have navigated to the “Security” Tab, select the “Trusted sites” icon



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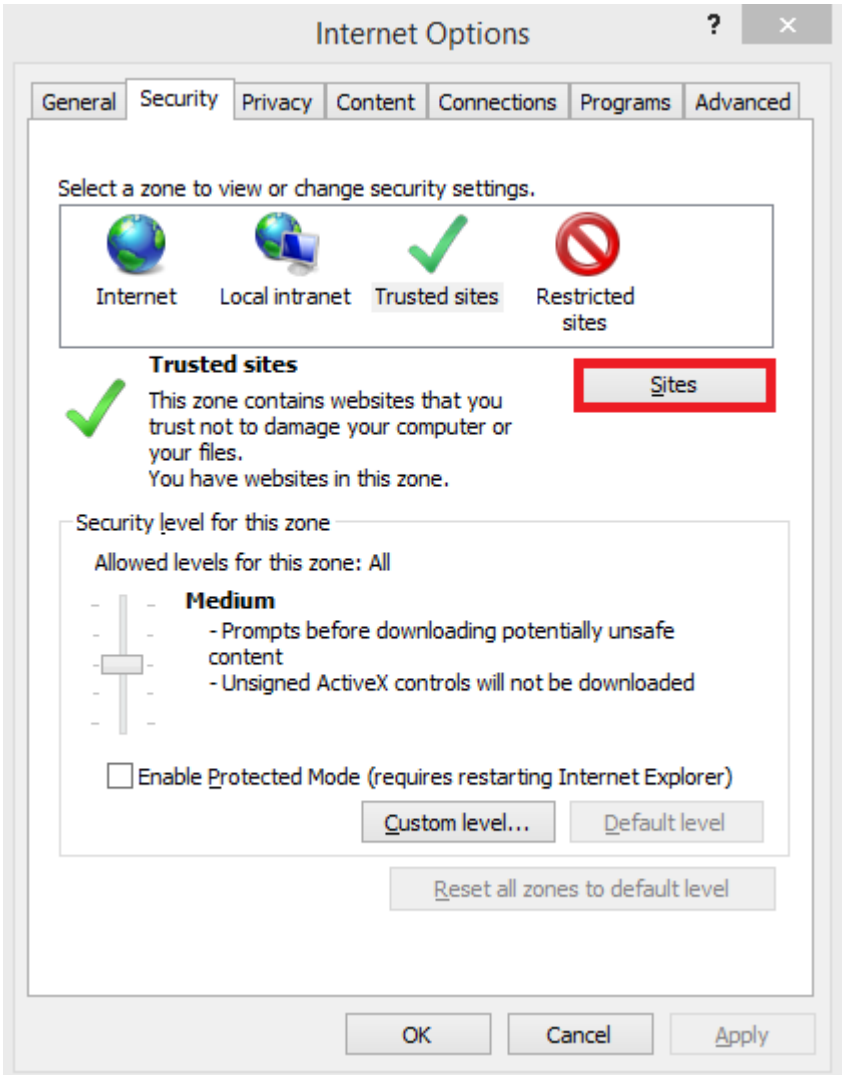
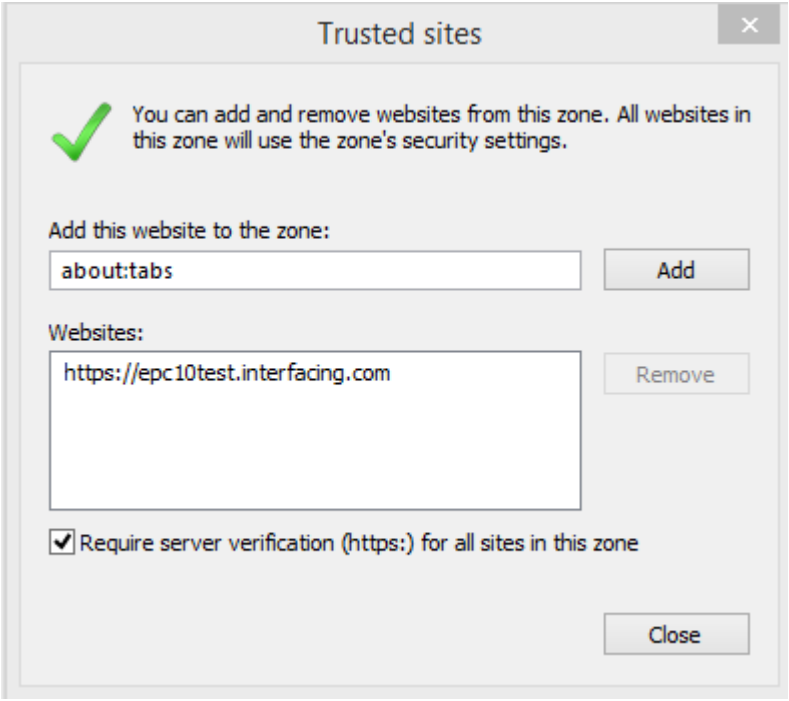
9. Select the “Sites” icon



10. This will generate a pop-up window



4.7.4.1.1.3 Print

The print button allows users to directly print the details page that they are currently viewing. Selecting the print function will automatically generate a formatted details page printout that a user can print directly.

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4.7.4.1.1.4 Subscribe

The subscribe function, symbolized by the icon, has been added to allow users to track items, objects and processes in the EPC. Users can subscribe to specific items or processes to simplify and centralize monitoring activities. By subscribing to items, users will receive notifications when items or processes are altered or optimized. Additionally, item subscriptions is a useful filter and option for Home page Widgets, allowing users to create Widgets specifically featuring items they deem as critical to their individual jobs.

To use this function, simply click on the subscribe button, which will change from to .

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4.7.4.2 Attributes

Users can find a variety of information about Documents within the details section. This information allows users to fully understand all information about specific items, and provides users with a specific destination that can be used to see and gather all relevant information. Document Details display the following content

1. Description
2. File Details
3. Responsibilities
4. Associations
5. Documents
6. Properties

By default, the attributes within the Details components will be collapsed. Users can expand these attributes by:

1. Clicking on the › next to each item to expand individual attributes
2. Clicking on the icon at the bottom right corner of the page to expand all attributes

> Selecting different items may result in different information being displayed. The above components specifically relate to information that will be provides for objectives and performance measures. Note however that all relevant info for items will be displayed.

> The details page only populates details that are specific to each item. Users must navigate to the specific item they wish to retrieve information on to obtain full details.

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4.7.4.2.1 Description

The description section provides users with all details relating to what a document is, as well as particular information that can assist with execution. This information, populated by EPC Modelers, will provide further details for users to.

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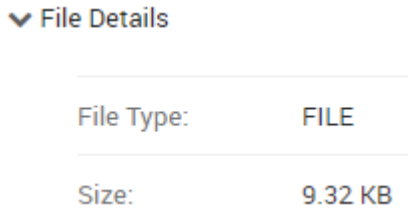
4.7.4.2.2 File Details

The file details section will provide users with supplemental information about a document, including file type and size. This information can be useful to end users to understand if a user possesses the necessary software applications to view the document in question.

The information is displayed as follows:



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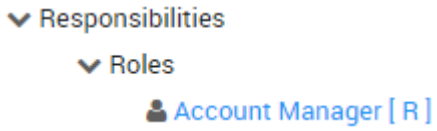
4.7.4.2.3 Responsibilities

The Responsibilities section displays de roles, resources and/or assets that are responsible for the document you are viewing. This provides additional details about any associated object that has been tied to the item using the RASCI-VS matrix.

Users can navigate directly to the item pages that are featured in this section. Users can click on the specific item's name highlighted in blue. You will be redirected to the item's details page.



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4.7.4.2.4 Associations

The Associations section lists all of the Documents, Rules, Risks, Controls, Performances, Services, and Master Data that are associated to the document. This allows users to quickly see what specific items have been tied to.

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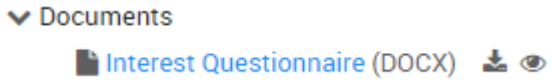
4.7.4.2.5 Documents

This section lists all documents that have tied to the item being viewed. This provides users with a list of relevant documents, as well at the ability to directly access these documents. Users are additionally provided details regarding the document type (docx, pptx, URL, xlsx, etc.)

Users are provided with a direct access link listed in blue. Clicking on the name will navigate a user to the documents details page.



To directly access the document, users can preview, or download the document in questions.

1. **Preview**: To preview the document click on the icon. Please see the list below for documents available for preview.

2. **Download**: To download the document click on the icon

Documents Available for Preview:

PDF Files	Available with extension Adobe Acrobat	Available with extension Adobe Acrobat	Available with extension Adobe Acrobat	Available with extension Adobe Acrobat	Available with extension Adobe Acrobat
Image Files • Png • Jpeg, jpg • Gif • Svg, svgz • Tif, tiff • Wbmp •	Available (all)	Available (all)	Available (all)	Available (all)	Available (all)

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Webp • Ico • Jng • bmp					
URLs	Available	Available	Available	Available	Available
File Links	Available with extension Local Links	Available with extension Local Filesystem Links	Available if Trusted Sites added*	Unavailable	Unavailable
MP3	Available	Available	Available	Available	Available
MP4	Available	Available	Available	Available	Available
Wav Files	Available	Available	Unavailable	Available	Available
Ogg Files	Available	Available	Unavailable	Available	Unavailable

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4.7.4.2.6 Properties

The properties section provides users with additional key information about items. The properties section is broken down into a category:

• **Version**: Provides information about what version is being viewed, and when the latest modification has been made

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4.8 Collaboration

Collaboration is crucial to organizational success. Interacting with one another, sharing knowledge and expertise, and communicating lessons learned is an important part of growing and developing an organization. The Collaboration Module allows users to interact with one another, enabling discussion, feedback and improvement within the EPC. Simply put, it is the Module that allows organizations to better themselves.

The EPC provides an organized, interactive platform that encourages continuous improvement through communication. Users can comment on specific items, question and optimize items within the EPC.

The collaboration module provides 4 major collaboration features that users can engage in regardless of organizational hierarchy:

1. Discussion: This allows users, to start and participate in meaningful discussion about business processes, tasks, performance indicators, etc. This enables personnel to share personal expertise and experience, and communicate it to the individuals responsible for the activities.

2. Question: This allows users to question and clarify various items within the EPC.

3. Incident: This allows users to report incidents relating to items within the EPC. Users can report problems and case-based scenarios that allow firms to drive continuous improvement (E.g. defect to report).

4. Improvement Requests: This allows users to propose improvements to organizational activities and processes. Users are provided the opportunity to map out improvements that they believe will benefit the firm.

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4.8.1 Navigation

The Collaboration Module itself compiles, in list form, all collaborative activities that a user is involved with. It provides a consolidated list featuring items that users have commented and discussed, as well as all items engaged in collaborative activities that are associated to users with the RASCI-VS Matrix. This is provides users with one destination to view and understand all processes undergoing discussion and improvement.

Symbolized by the icon, users can access collaboration activities regarding all objects by the simple click of the button on the select pages. The Collaboration functions can be accessed on all item's different Graph and Details pages.

Users can access collaboration items:

1. Through the EPC Collaboration Module
2. On Item pages

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4.8.1.1 Collaboration Module

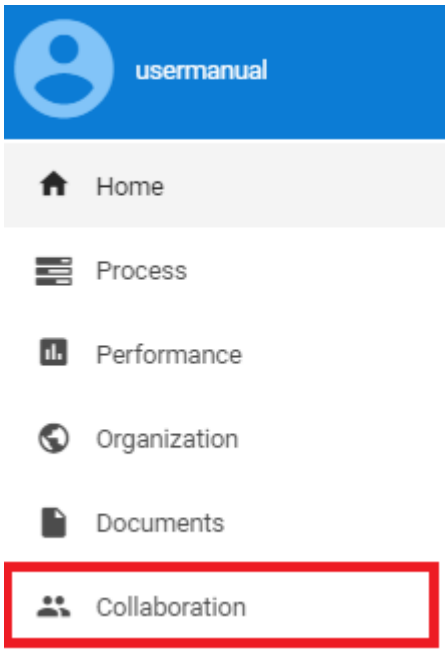
The Collaboration Module provides a listed format of all items that a user is engaged with. Engagement can mean they are currently discussing, questioning or reporting information on an item, but it also involves items that users are linked to (Using RASCI-VS matrix) that are currently undergoing such improvements. The Collaboration Module features a List View format, with a variety of key information that is inputted by users when engaging in collaboration activities. These key features are highlighted below:

Item	Description
Type	Displays the type of collaboration activity being undertaken (Discussion, Question, Incident, Improvement Requests)
Subject	The subject of the collaboration engagement, created by the initiator of the collaboration
Replies	A numerical representation of the amount of replies regarding a specific collaboration engagement
Status	The current status of the collaboration engagement (Open, Work in Progress, Closed, Rejected)
Priority	The priority level that has been attributed to the engagement (Minor, Normal, Major, Critical)
Object Name	The specific name of the object subject to the collaboration engagement
Object Type	The type of the object subject to the collaboration engagement
Last Modified By	An identifier, showing the latest user to participate in the collaboration engagement
Modified Date	The date that this item was most recently edited

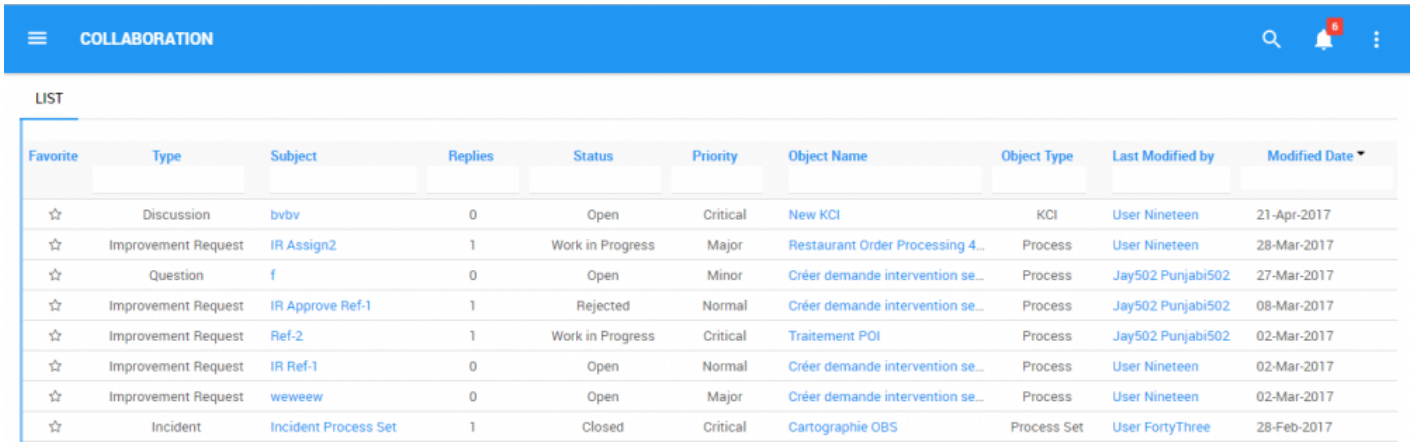
To navigate to the Collaboration Module, please see the steps below:

1. Click on the **Navigation Menu Button** on the top left of your screen.

2. Click on **Collaboration**



3. The Collaboration Module features only a List format, which can be further **Sorted** and **Filtered**.



Favorite	Type	Subject	Replies	Status	Priority	Object Name	Object Type	Last Modified by	Modified Date
☆	Discussion	bvbv	0	Open	Critical	New KCI	KCI	User Nineteen	21-Apr-2017
☆	Improvement Request	IR Assign2	1	Work in Progress	Major	Restaurant Order Processing 4...	Process	User Nineteen	28-Mar-2017
☆	Question	f	0	Open	Minor	Créer demande intervention se...	Process	Jay502 Punjabi502	27-Mar-2017
☆	Improvement Request	IR Approve Ref-1	1	Rejected	Normal	Créer demande intervention se...	Process	Jay502 Punjabi502	08-Mar-2017
☆	Improvement Request	Ref-2	1	Work in Progress	Critical	Traitement POI	Process	Jay502 Punjabi502	02-Mar-2017
☆	Improvement Request	IR Ref-1	0	Open	Normal	Créer demande intervention se...	Process	User Nineteen	02-Mar-2017
☆	Improvement Request	weweew	0	Open	Major	Créer demande intervention se...	Process	User Nineteen	02-Mar-2017
☆	Incident	Incident Process Set	1	Closed	Critical	Cartographie OBS	Process Set	User FortyThree	28-Feb-2017

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4.8.1.1.1 Sorting

Sorting allows users to classify documents based on selected criteria. You can sort list results for any column title that is written in BLUE.

How to use “Sorting” Function

1. Navigate to the Collaboration Module

2. Navigate Cursor to desired **Category**

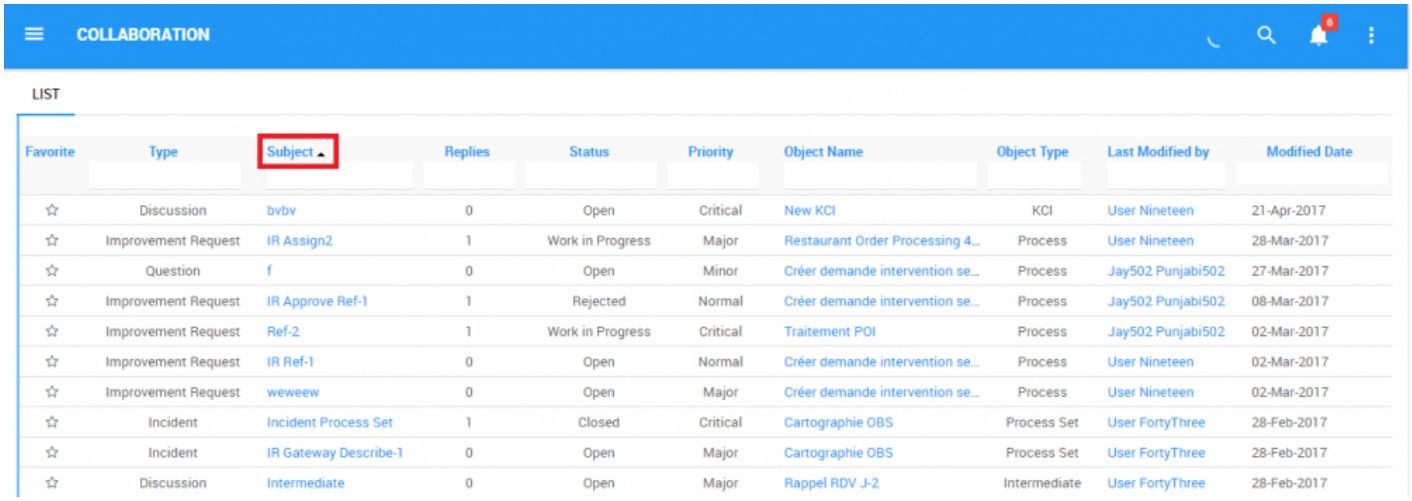
3. Click on the **Category**

1-Click will sort the Category in Ascending order, reflected by ▲

2-Clicks will sort the Category in Descending order, reflected by ▼

3-Clicks will Remove the sorting action

Ascending Example: The Name column is sorted in **ascending** order.



Favorite	Type	Subject ▲	Replies	Status	Priority	Object Name	Object Type	Last Modified by	Modified Date
☆	Discussion	bvbv	0	Open	Critical	New KCI	KCI	User Nineteen	21-Apr-2017
☆	Improvement Request	IR Assign2	1	Work in Progress	Major	Restaurant Order Processing 4...	Process	User Nineteen	28-Mar-2017
☆	Question	f	0	Open	Minor	Créer demande intervention se...	Process	Jay502 Punjabi502	27-Mar-2017
☆	Improvement Request	IR Approve Ref-1	1	Rejected	Normal	Créer demande intervention se...	Process	Jay502 Punjabi502	08-Mar-2017
☆	Improvement Request	Ref-2	1	Work in Progress	Critical	Traitement POI	Process	Jay502 Punjabi502	02-Mar-2017
☆	Improvement Request	IR Ref-1	0	Open	Normal	Créer demande intervention se...	Process	User Nineteen	02-Mar-2017
☆	Improvement Request	weweew	0	Open	Major	Créer demande intervention se...	Process	User Nineteen	02-Mar-2017
☆	Incident	Incident Process Set	1	Closed	Critical	Cartographie OBS	Process Set	User FortyThree	28-Feb-2017
☆	Incident	IR Gateway Describe-1	0	Open	Major	Cartographie OBS	Process Set	User FortyThree	28-Feb-2017
☆	Discussion	Intermediate	0	Open	Major	Rappel RDV J-2	Intermediate	User FortyThree	28-Feb-2017

Descending Example: The Name column is sorted in **descending** order.

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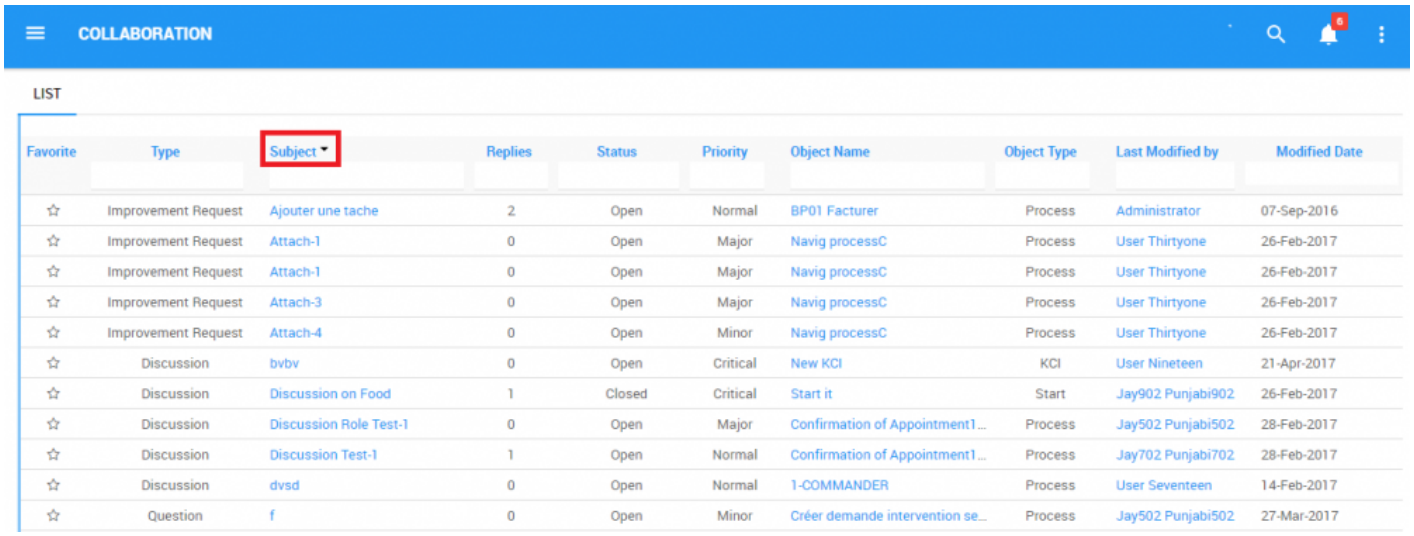

Multi-sorting (multiple columns) is available.

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4.8.1.1.2 Filtering

Filtering is a useful way for you to extract a specific subset of EPC content based on conditions related to what you need to find.

The Filtering section will cover the following:

1. How to Add Filters
2. How to Remove Filters
3. How to Combine Filters

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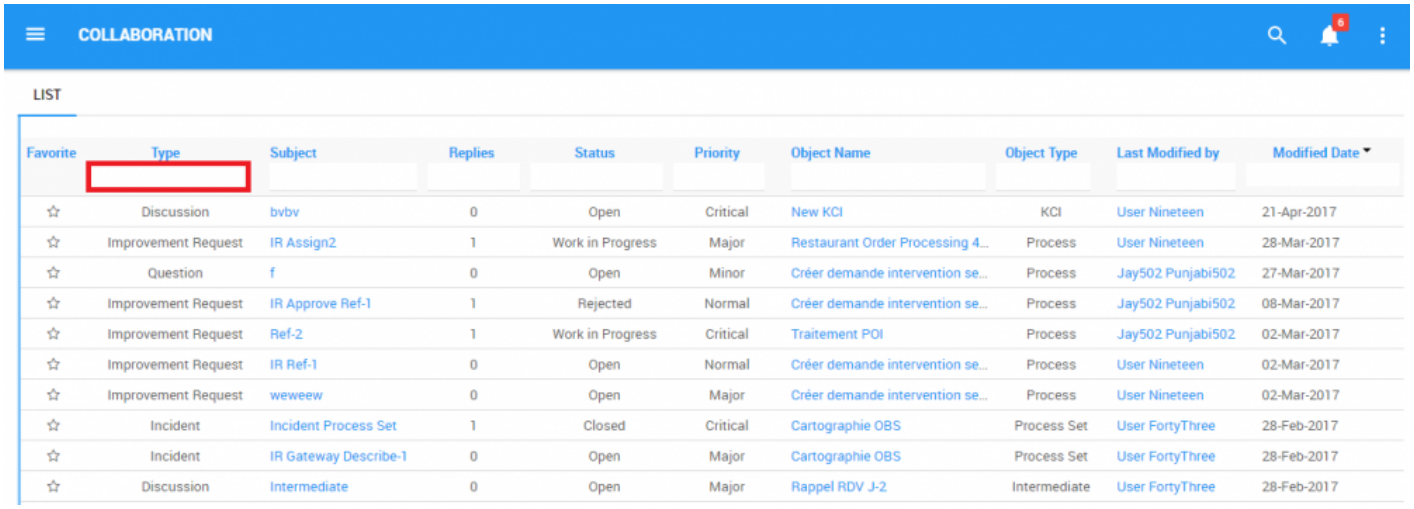
4.8.1.1.2.1 Add filter

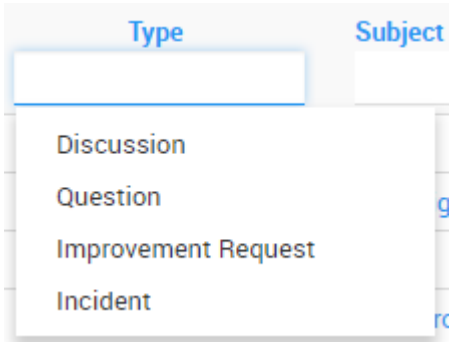
You can add filters to see items of your choice. **Type** what you are looking for, **select** the filter in the drop-down menu, or **define the range of dates**.

How to Add Filter

1. Navigate cursor and select the box column you wish to filter. For this example, we will use **Type**.



2. Select the box, which will generate a drop down menu



3. Select the desired filter. For this example, we will select Discussion and Question.

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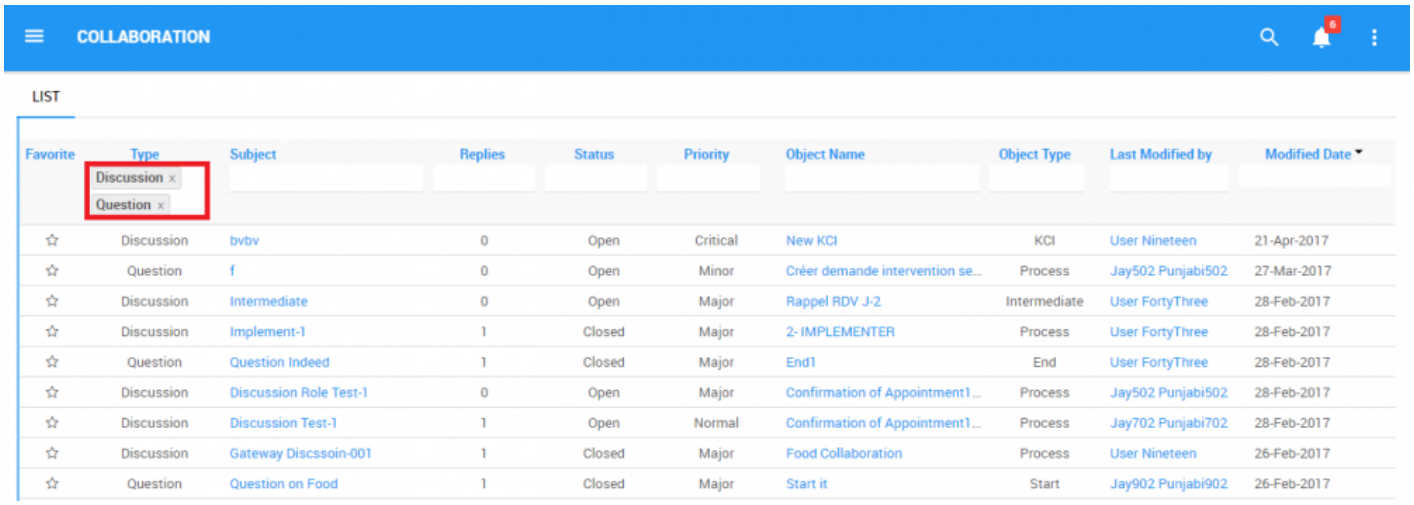

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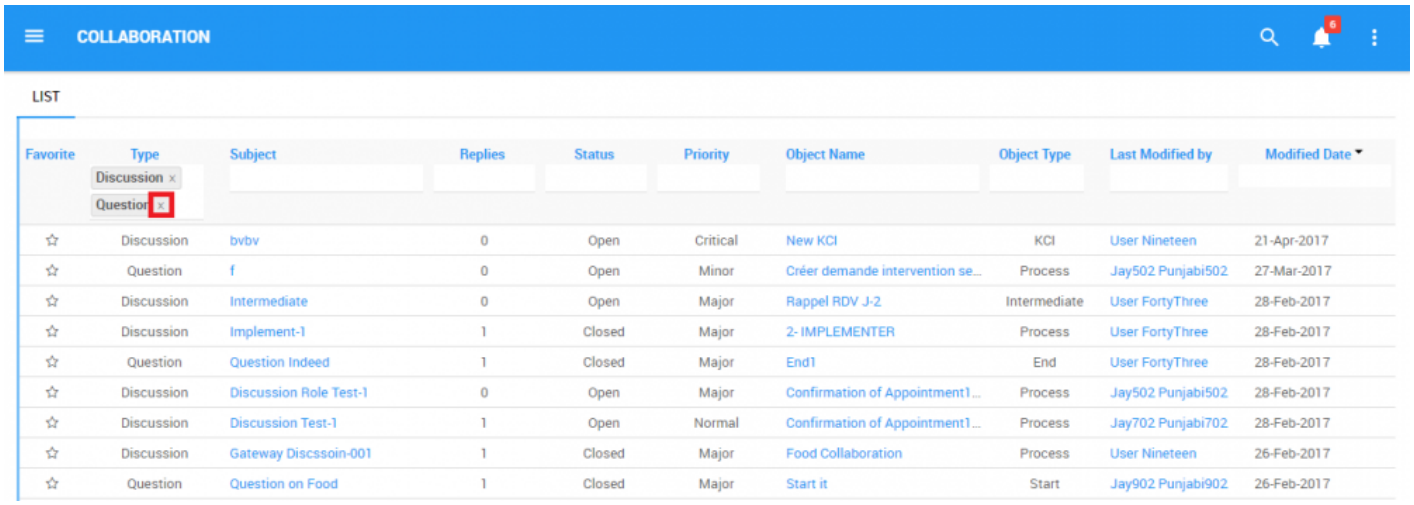
4.8.1.1.2.2 Remove Filter

You can remove filters; this will naturally increase the results in your list. See below to know how to add filters.

How to Remove Filter

To do so, click on the button beside the filter name.



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4.8.1.1.2.3 Combine Filter

You can combine filters, meaning you can add any other column filter to isolate results. See above to see how to **add** filters.

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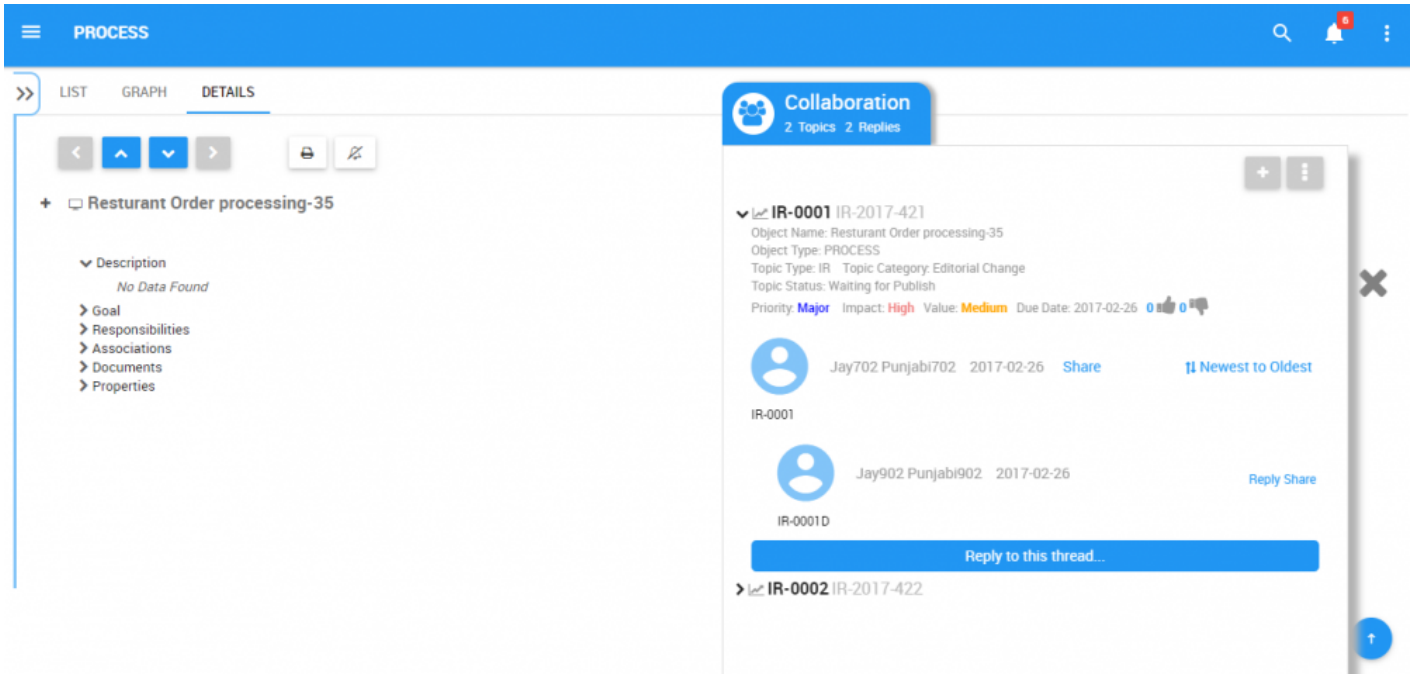
4.8.1.2 Item Pages

Users can access item's collaboration pages through the specific items pages themselves. This function allows users to immediately engage in collaboration activities within the item they choose to discuss. This allows users to view, analyze and propose changes to items directly.

Users can access the collaboration feature through the icon. This icon, displayed on the right side of Graph and Details pages, allows users to generate a pop-up window featuring collaboration activities.

Items are listed based on priority (Blocker, Critical, Major, Normal, Minor) and subsequently organized by date. Items are moved to the top of the list if activity (such as a reply) is made.



The collaboration pop-up window features a variety of key information that users should be aware of:

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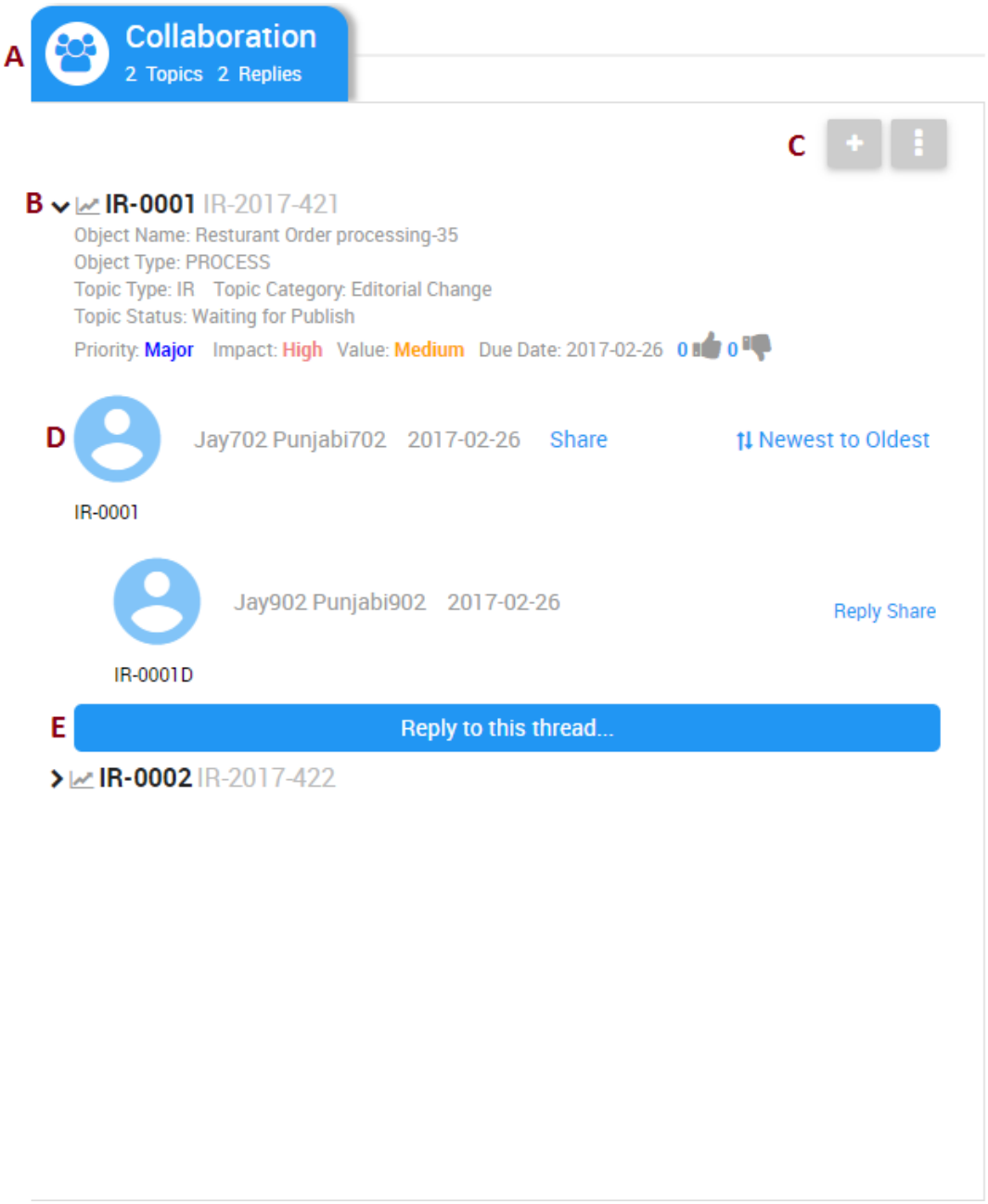

Outlined here:

Item	Name	Description
A	**Header**	Features the total amount of collaboration engagements (Topics) and comments (Replies)
B	**Title & Description**	The title and details about the collaboration engagement undertaken. These are populated by the EPC and the collaboration engagement initiator.
C	**Toolbar**	Providing users additional features and details

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D	**Comments Section**	This section lists the original and latest comments made within the collaboration thread.
E	**Reply Function**	This is the function that allows users to reply and participate in the collaboration activities.

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4.8.2 Using Collaboration Features

Using the Collaboration feature is allows users and businesses to continuously drive continuous improvement. Users are encouraged to voice their opinion, provide insight and thus, continuously engage in process improvement.

The section below will cover:

1. How to **initiate** a collaboration engagement
2. How to **participate** in a collaboration engagement
3. How to **monitor** collaboration engagements

> If a collaboration engagement is initiated on an item within a process, it will be displayed on the process collaboration page. This allows users to view all collaboration initiatives involving all aspects within a given process.

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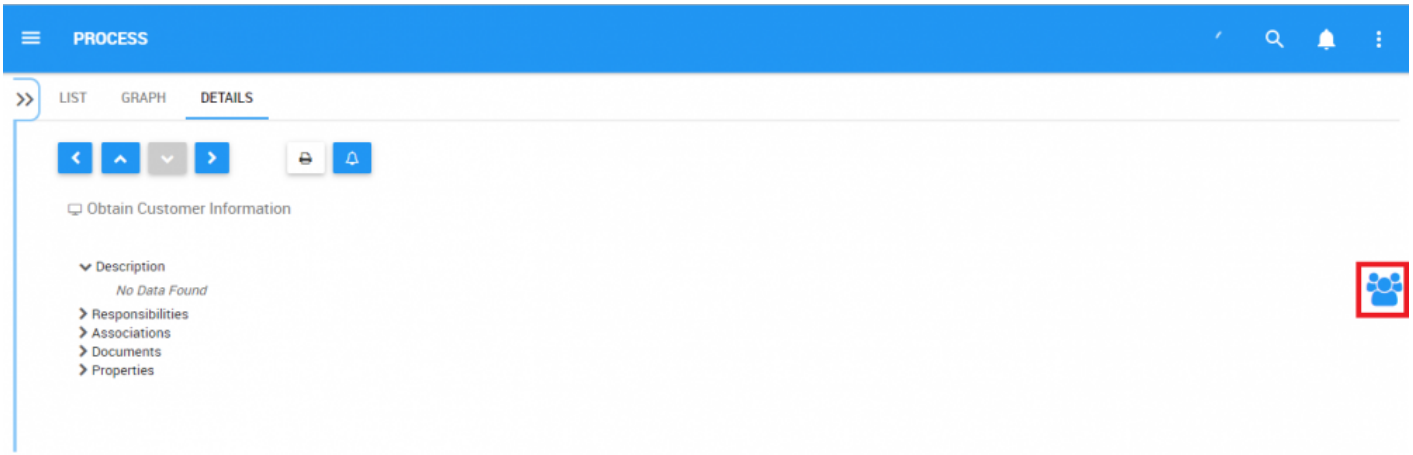
4.8.2.1 Initiating Collaboration

Users can initiate a collaboration engagement on any item pages. If a user would like to report an incident, ask a question or propose an improvement, it can be done directly on the item's page. These actions can be done for both specific items (e.g. task, document, KPI) as well as overarching item (e.g. process, document set, objective).

For further details on how to initiate a collaboration activity, please see the steps below:

1. Navigate to an item's Details page. For this example we will be selecting the "Obtain Customer Information" Task.

2. Select the icon on the right side of the screen



3. Clicking on the icon will generate a pop-up window

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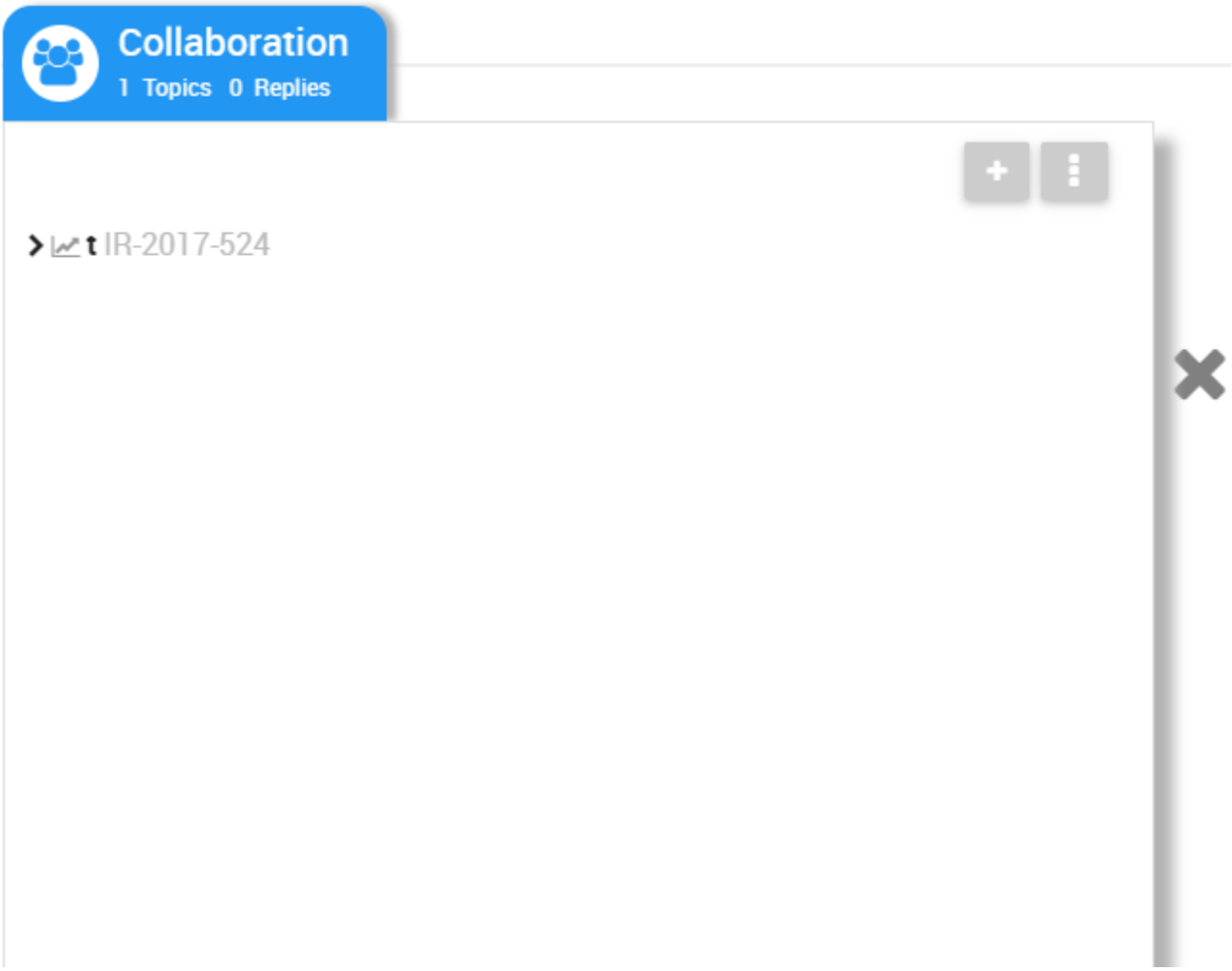
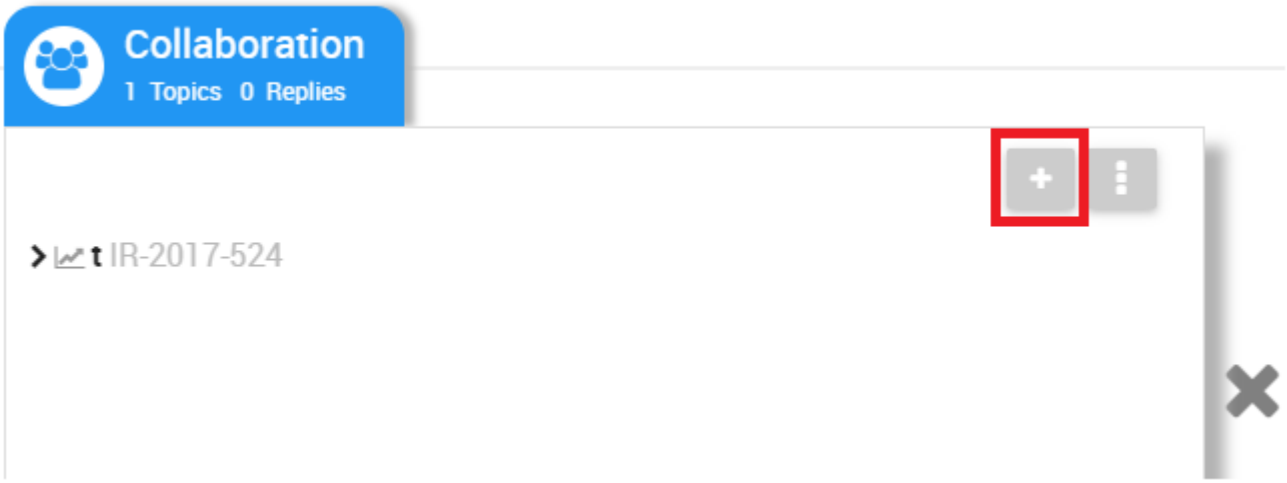


4. Select the icon at the top right corner of the page



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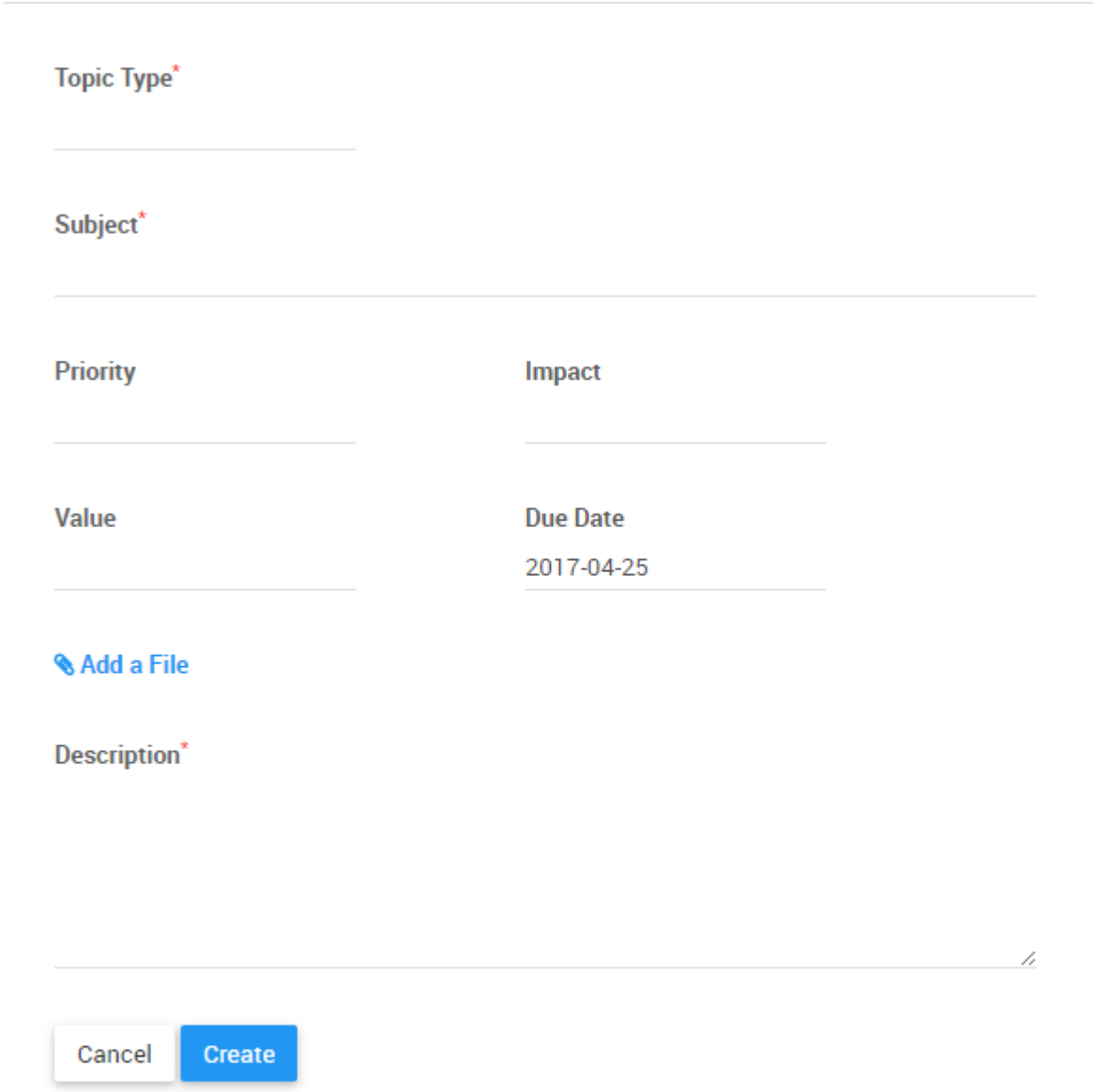
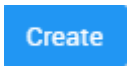
5. This will generate a window where you will be asked to fill in a variety of fields pertaining to the collaboration engagement



6. Once populating the desired field, select the 

icon and it will initiate a collaboration engagement. For details on the specific fields, please see the sections below.

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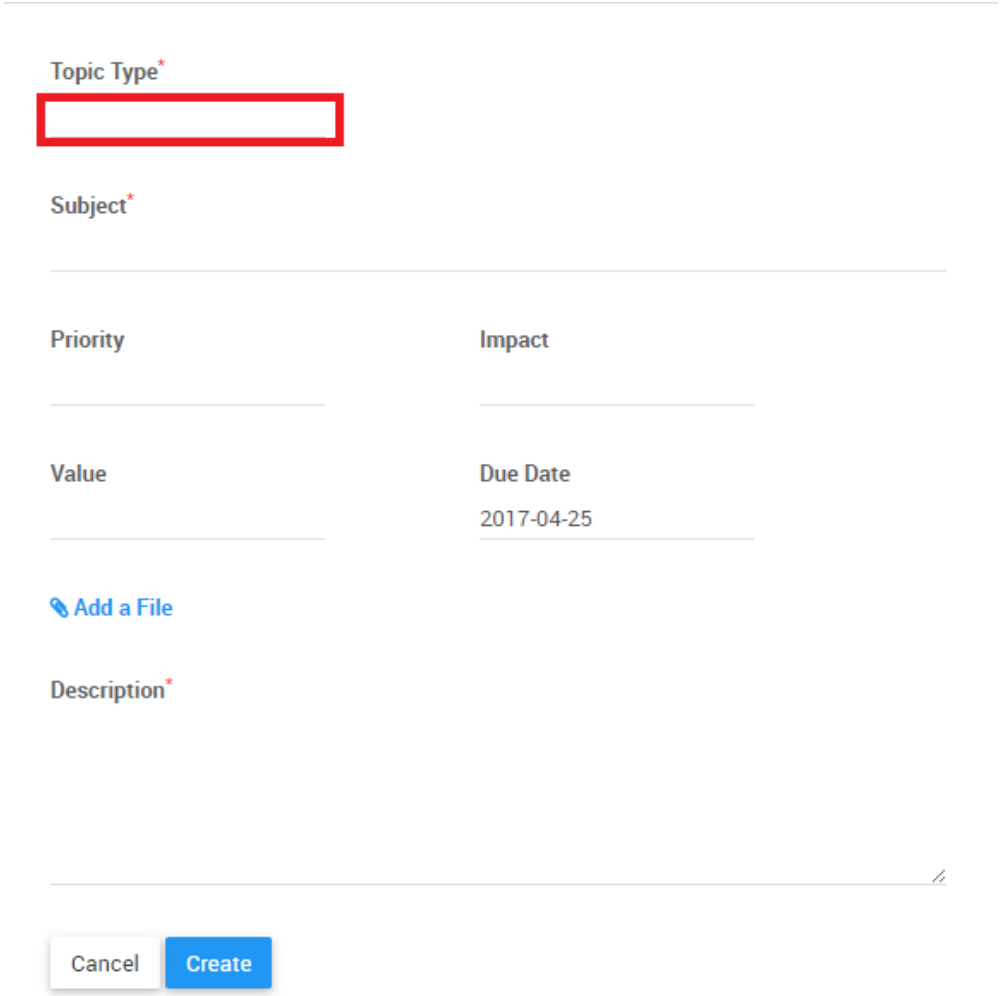
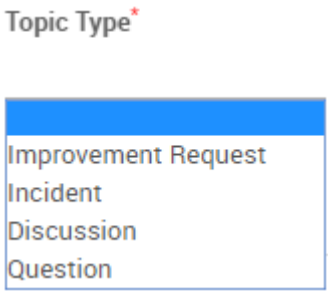
Select **Topic Type**:

a. Select the **Topic Type** text bar



b. This will generate a drop-down menu with the following options



c. Select the desired collaboration engagement

Enter **Subject**:

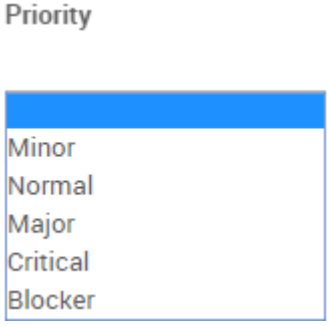
a. Navigate to the Subject text bar

b. With your keyboard enter the desired subject

Select **Priority**:

a. Navigate to Priority text bar

b. This will generate a drop-down menu with the following options



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c. Select the desired priority rating

Select **Impact**:

a. Navigate to Impact text bar

b. This will generate a drop-down menu with the following options

c. Select the desired priority rating

Select **Value**:

a. Navigate to Value text bar

b. This will generate a drop-down menu with the following options

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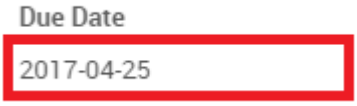
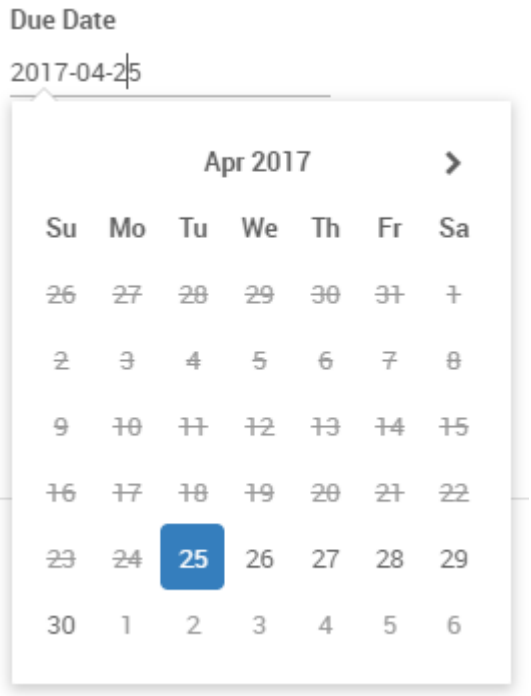
c. Select the desired priority rating

Select **Due Date**:

a. Navigate to Due Date text bar



b. This will generate a drop-down menu with calendar



c. Select the desired due date

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Adding a File:

a. Navigate to Add a File section

b. Select the icon

c. Select the file you desire to add to the collaboration engagement

Adding a **Description**:

a. Navigate to the Description text bar

b. With your keyboard enter the desired description

All fields denominated by * are required fields. These fields must be completed to successfully create a collaboration engagement

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4.8.2.2 Participating in Collaboration

Users can participate in collaboration engagements in a variety of facets. Users can:

1. **Reply** to an open engagement
2. **Share** an engagement or comment
3. **Vote** on an open engagement, and
4. **Close** the collaboration engagement (If authorized)

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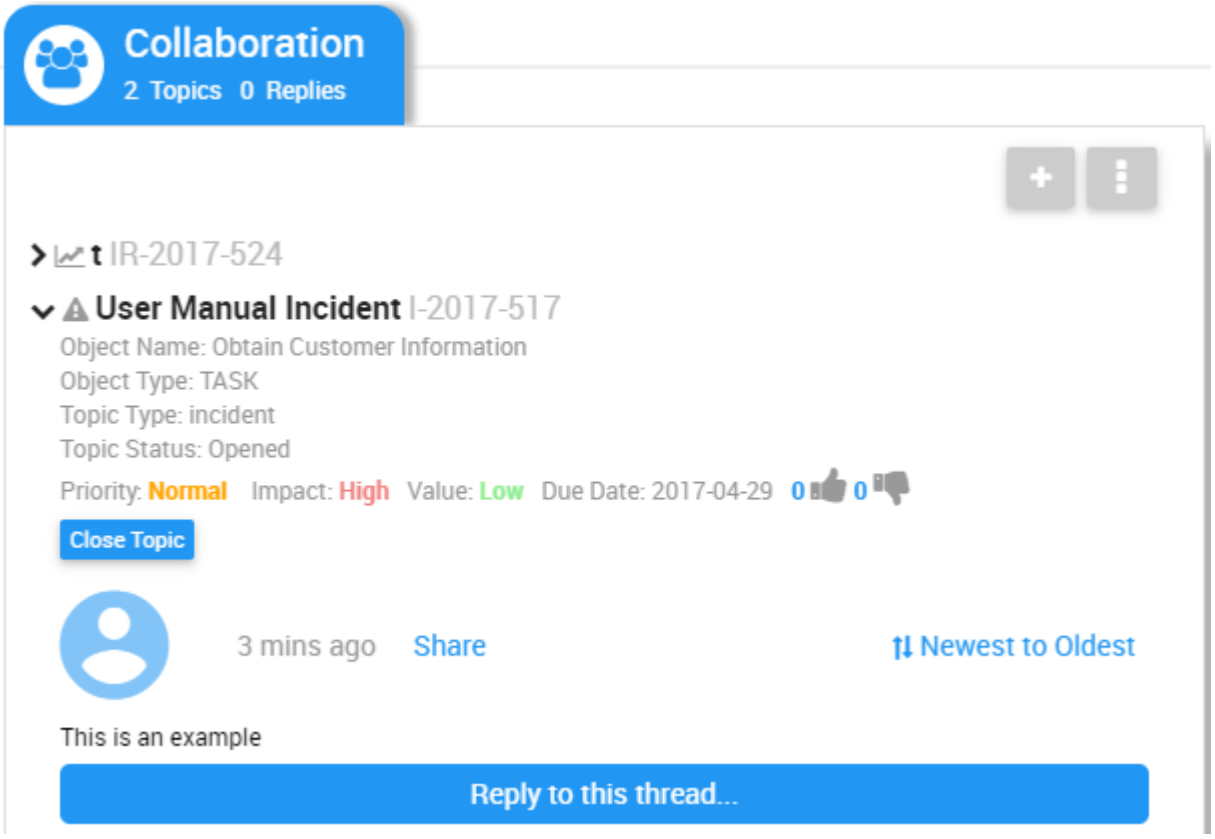
4.8.2.2.1 Reply

Users can reply to collaboration engagements within the collaboration window. Users are encourgared to share their opinions and perspectives to further promote continuous improvement within an organization.

To Reply to a collaboration engagement, please see the steps below:

1. Navigate to the object subject to a collaboration engagement

2. Open the collaboration window



3. Select the “Reply to this thread…” button

4. This will generate a textbox where users can enter their response and attach a file if necessary

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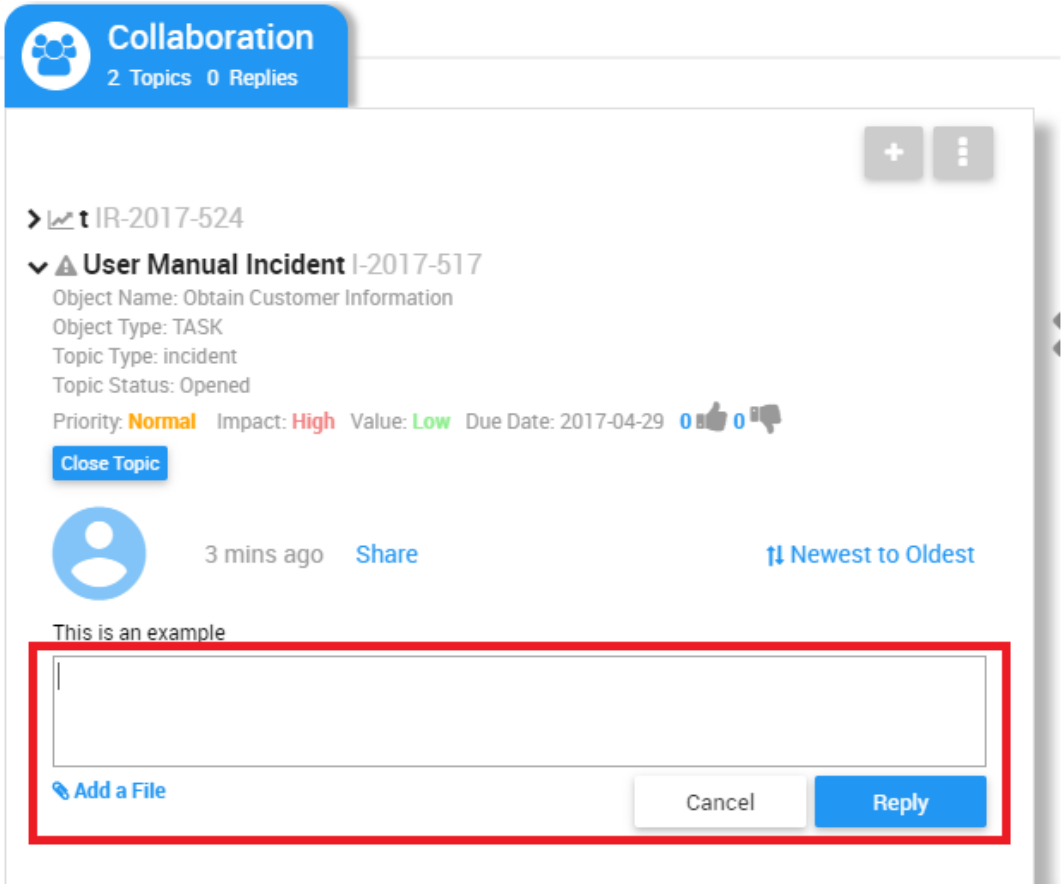
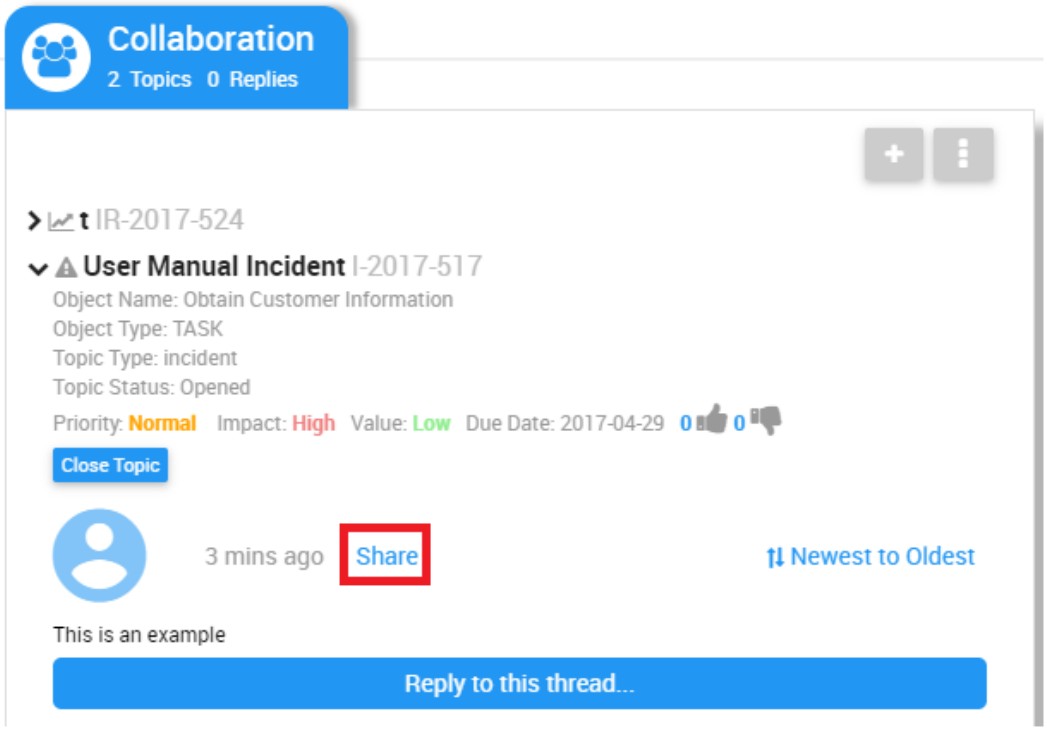

Collaboration
2 Topics 0 Replies
IR-2017-524
User Manual Incident I-2017-517
Object Name: Obtain Customer Information
Object Type: TASK
Topic Type: incident
Topic Status: Opened
Priority: Normal Impact: High Value: Low Due Date: 2017-04-29 0 0
Close Topic
3 mins ago Share
Newest to Oldest
This is an example
Add a File
Cancel
Reply

4.8.2.2.2 Share

Users can share collaboration engagements with other parties to facilitate communication. To do so, users can select the Share icon, providing users with a URL they can share with others.



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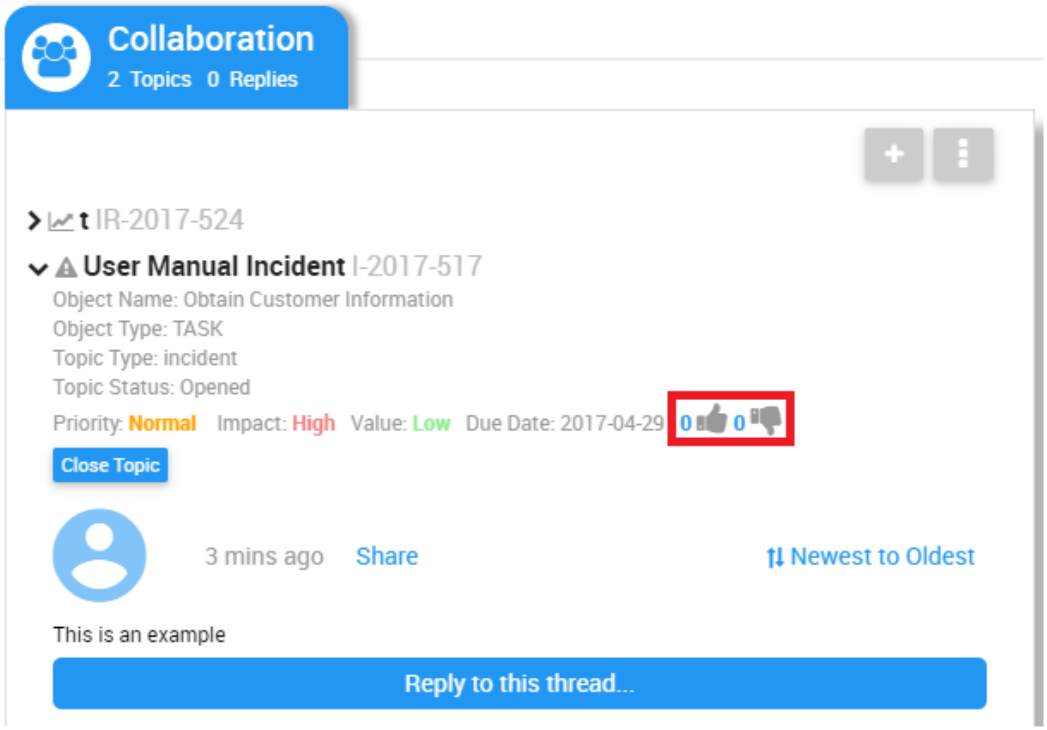
4.8.2.2.3 Vote

Users can express their opinion on collaboration engagements in effort to expedite the process. Providing a “Voting” option allows organizations and managers to quickly gain opinion on improvement suggestions, facilitating continuous improvement.

The voting is denominated by the 0 0 icon. Users can vote by clicking on the “Thumbs Up” or Thumbs Down” button. Dependent on the scenario, users may voluntarily or may be mandated to vote on collaboration engagements.



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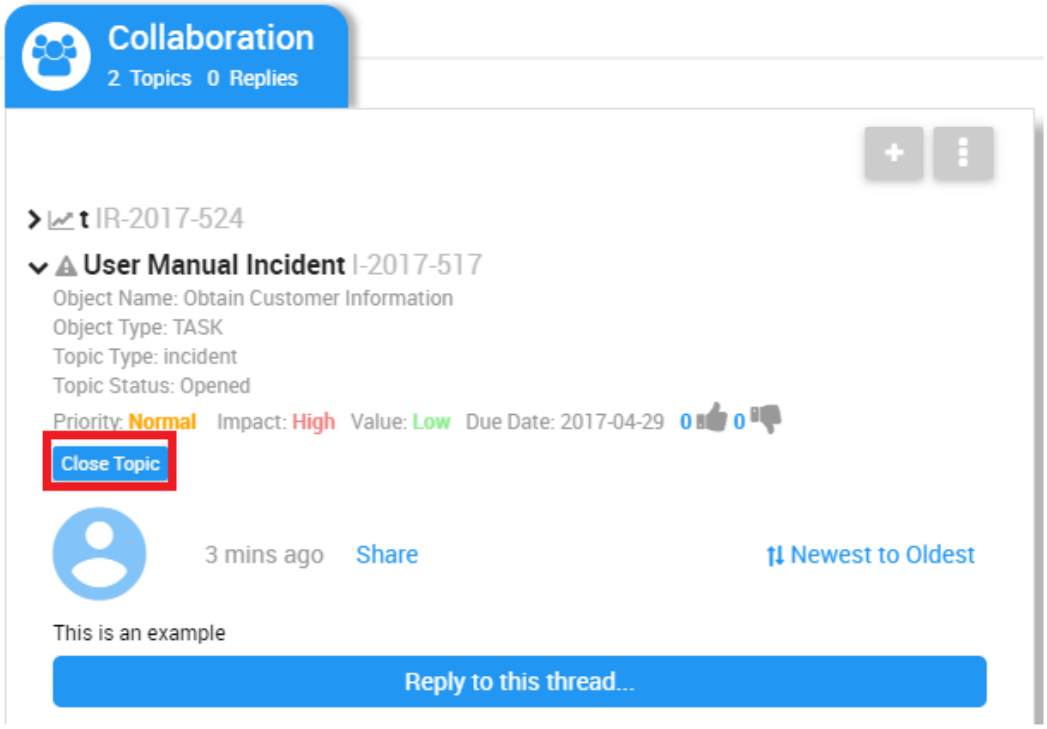
4.8.2.2.4 Close Topic

Once a collaboration engagement accomplishes its desired goal, it can be closed by select users.

Two types of users can close engagements:

1. Collaboration Engagement Initiators
2. Process Owners (Users Assigned as Accountable)

To close the engagement, click on the Close Topic icon.



From here, a user will be able to **review** and **confirm** engagement termination in a subsequent window. Users will be required to provide a description once terminating a collaboration engagement.

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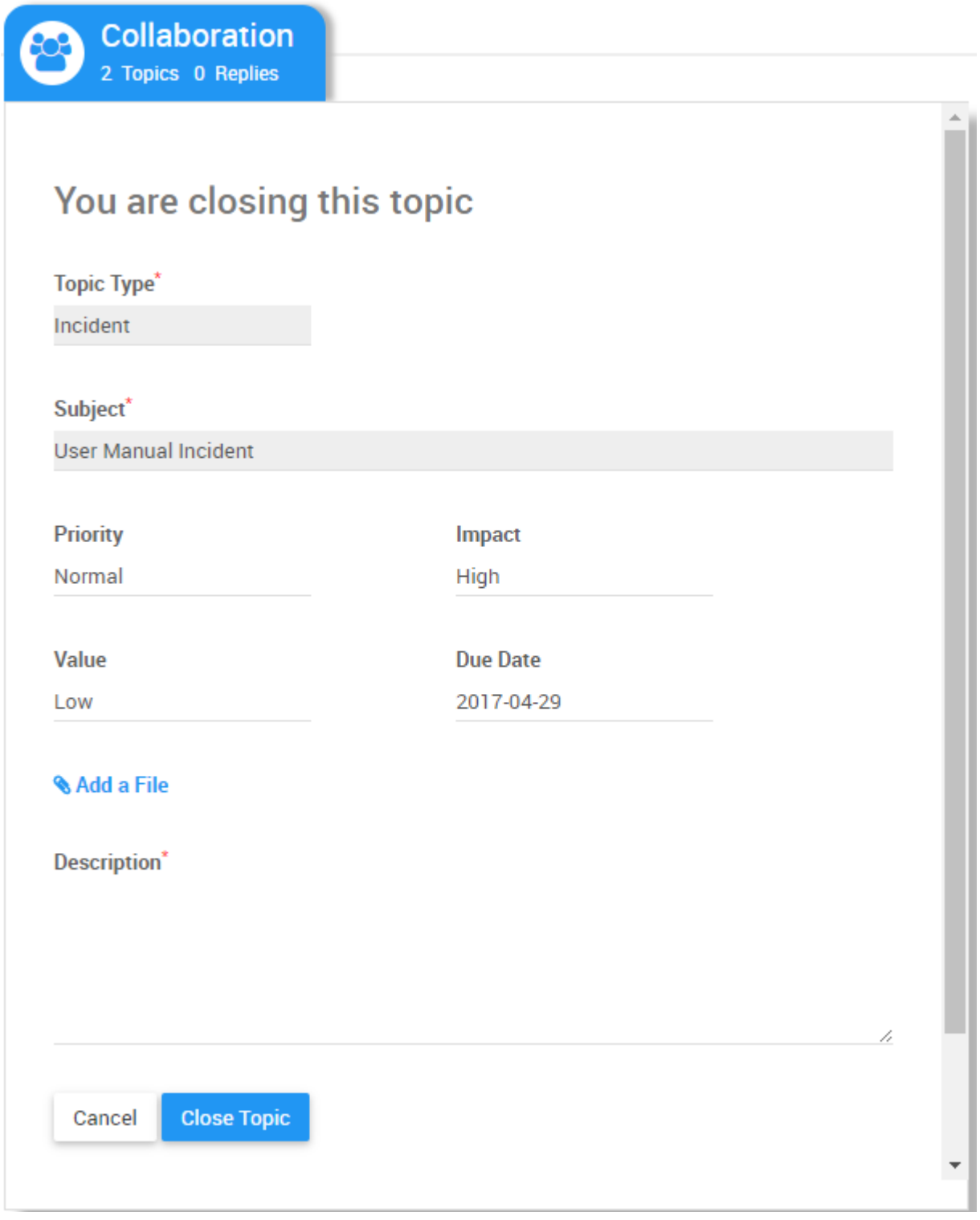

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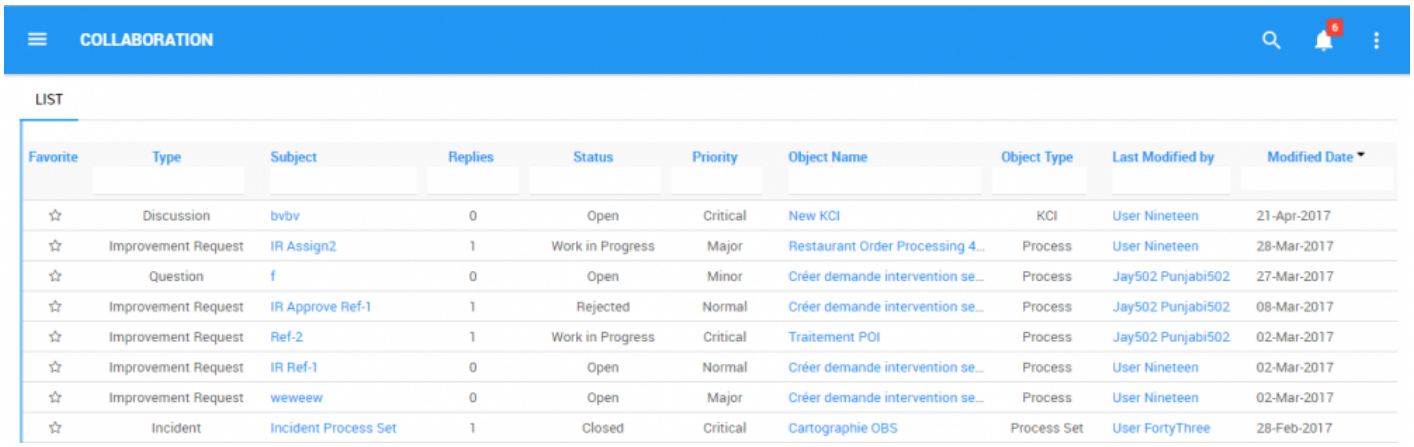
4.8.2.3 Monitoring Collaboration

Users are able to, and encouraged to monitor all items they are associated with that are undergoing collaboration engagements. Monitoring these will allow users to provide their opinion and expertise, and monitor changes moving forward.

Users can leverage the Collaboration Module as a central location for all collaboration engagements they are participating in. The Collaboration Module provides a list with a quick view of all these collaboration engagements.



Favorite	Type	Subject	Replies	Status	Priority	Object Name	Object Type	Last Modified by	Modified Date
☆	Discussion	bvbv	0	Open	Critical	New KCI	KCI	User Nineteen	21-Apr-2017
☆	Improvement Request	IR Assign2	1	Work in Progress	Major	Restaurant Order Processing 4...	Process	User Nineteen	28-Mar-2017
☆	Question	f	0	Open	Minor	Créer demande intervention se...	Process	Jay502 Punjabi502	27-Mar-2017
☆	Improvement Request	IR Approve Ref-1	1	Rejected	Normal	Créer demande intervention se...	Process	Jay502 Punjabi502	08-Mar-2017
☆	Improvement Request	Ref-2	1	Work in Progress	Critical	Traitement POI	Process	Jay502 Punjabi502	02-Mar-2017
☆	Improvement Request	IR Ref-1	0	Open	Normal	Créer demande intervention se...	Process	User Nineteen	02-Mar-2017
☆	Improvement Request	weweew	0	Open	Major	Créer demande intervention se...	Process	User Nineteen	02-Mar-2017
☆	Incident	Incident Process Set	1	Closed	Critical	Cartographie OBS	Process Set	User FortyThree	28-Feb-2017

To view further details regarding each collaboration engagement, users will need to navigate to the collaboration page of specific items.

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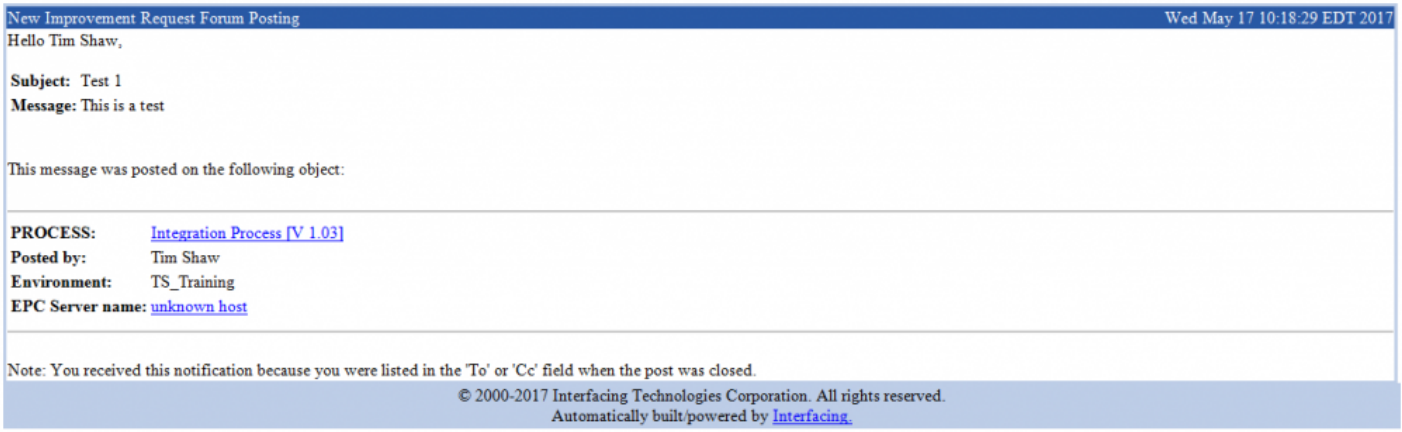
4.8.2.4 Notification and Confirmation

Users who are subscribed, or are associated with RASCI-VS to objects undergoing change, will receive notifications when collaboration engagements are initiated, acted upon and completed. This notification is designed to inform parties of activity related to them, their tasks or processes.

Users subscribed or associated with the process undergoing change will receive:

1. Email Notification


New Improvement Request Forum Posting Wed May 17 10:18:29 EDT 2017

Hello Tim Shaw,

Subject: Test 1
Message: This is a test

This message was posted on the following object:

PROCESS: Integration Process [V 1.03]
Posted by: Tim Shaw
Environment: TS_Training
EPC Server name: unknown host

Note: You received this notification because you were listed in the 'To' or 'Cc' field when the post was closed.

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Automatically built/powered by Interfacing.

2. In-App Notification
Test 1 was **created** for *Integration Process*

Test 1 (Improvement Request) for Integration Process (Process) was **created** by Tim Shaw(timshaw1) on May 17, 2017 10:18:29 AM

8 minutes ago Topic Created

4.8.3 Discussion

Discussions are a form of collaboration engagement that users can participate in. Users should enter into discussions regarding items within the EPC if they have any particular issue they wish to communicate or seek further elaboration. It provides a forum for users to share their opinions and expertise.

The Discussion function allows users to interact and participate in meaningful conversations regarding items and processes.

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4.8.4 Question

Questions are a form of collaboration engagement that users can participate in to seek further information or inquire about a particular item. This allows users to seek information to be better informed, question perceived redundancies, and highlight opportunities for improvement.

Questions can be paired with voting request, encouraging users to provide opinion and judgement on the issues at hand.

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4.8.5 Incident

Incidents are a form of collaboration engagement where users can report specific issues regarding items and processes. These incidents can relate to the presentation of the items within the EPC itself, or can be a platform to report issues regarding execution. This allows employees, within structure, to provide feedback on activities they are associated and involved with.

Incidents can be used to raise meaningful issues in a structured context. They allow managers and business leaders to understand, analyze and propose optimizations, driving continuous improvement.

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4.8.6 Improvement Request

Improvement requests allow end users to propose item and process improvements within the EPC Web App. Through the Collaboration Module, users can propose Association Changes, Description Changes, Editorial Changes and, Process Map Changes. Improvement Requests are a crucial part of continuous improvement within organization.

Improvement Request	Description
Association Changes	Users can propose alternative and/or new associations for specific items or processes. E.g. An HR Manager (Role) should be assigned as Responsible for the “Compose Job Description” Task
Description Changes	Users can propose alternative descriptions for items within the EPC that will be viewed on item’s Details page. E.g. The “Compose Job Description” Task Description should include the specific steps (1-Gather information, 2-Talk to division hiring, 3-List responsibilities, etc.)
Editorial Changes	Users can propose changes to the metadata of processes or tasks E.g. The “Compose Job Description” Task metadata should reflect a new piece of information.
Process Map Changes	Users can propose changes to the process maps themselves. E.g. The “Compose Job Description” Task should be a sub-process with 1-Gather information, 2-Talk to division hiring, 3-List responsibilities, as tasks.

Creating an Improvement Request

Any user can create an Improvement Request where they see an opportunity for operational optimization. Any individuals involved, as well as Process Owners (Accountable), will be **notified** and will be requested to comment and/or **vote** on the proposed activity. Further details on notification can be found below.

Improvement Requests follow a similar format to other collaboration engagements. The significant different, when initiating an Improvement Request, is the category of request being made.

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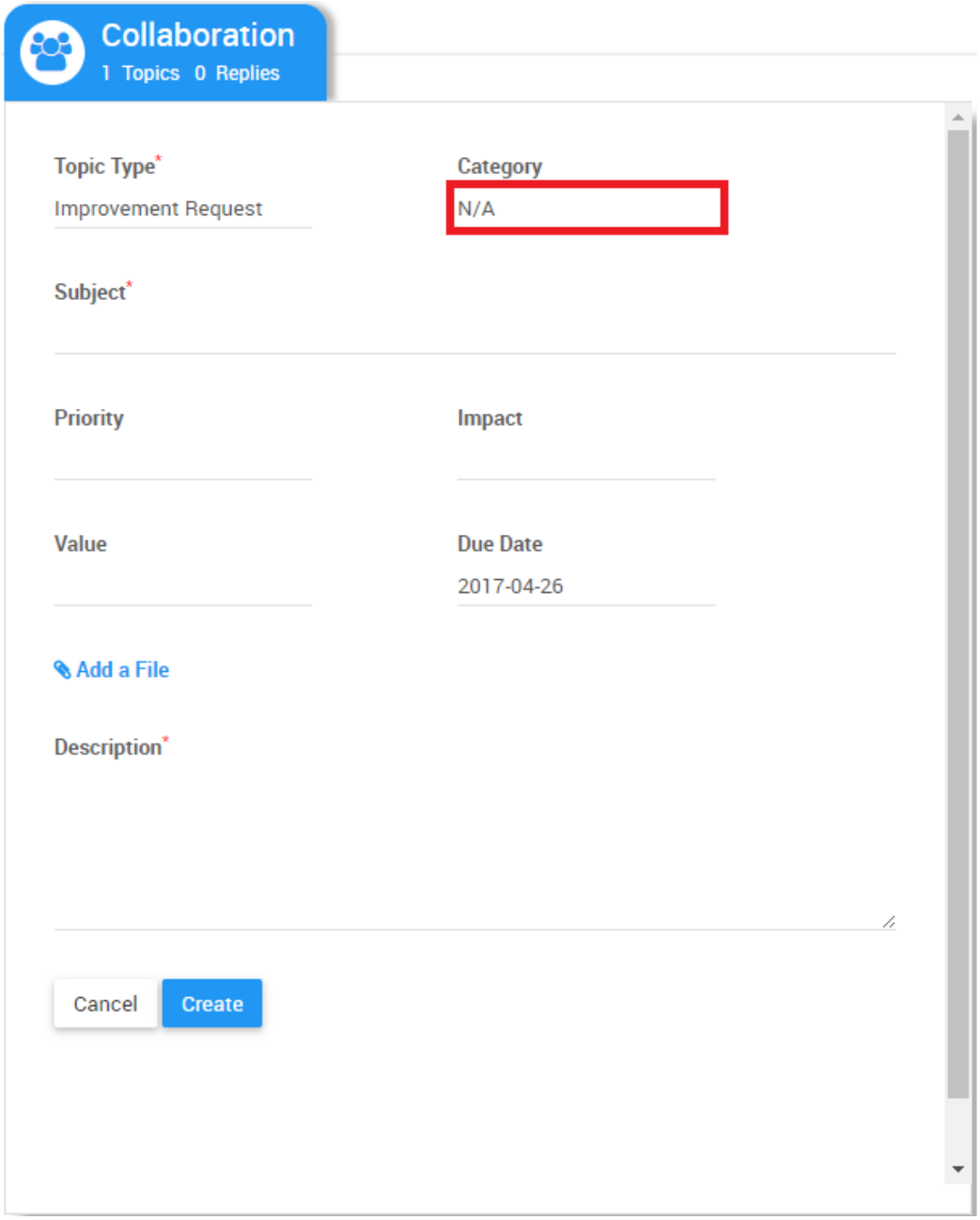

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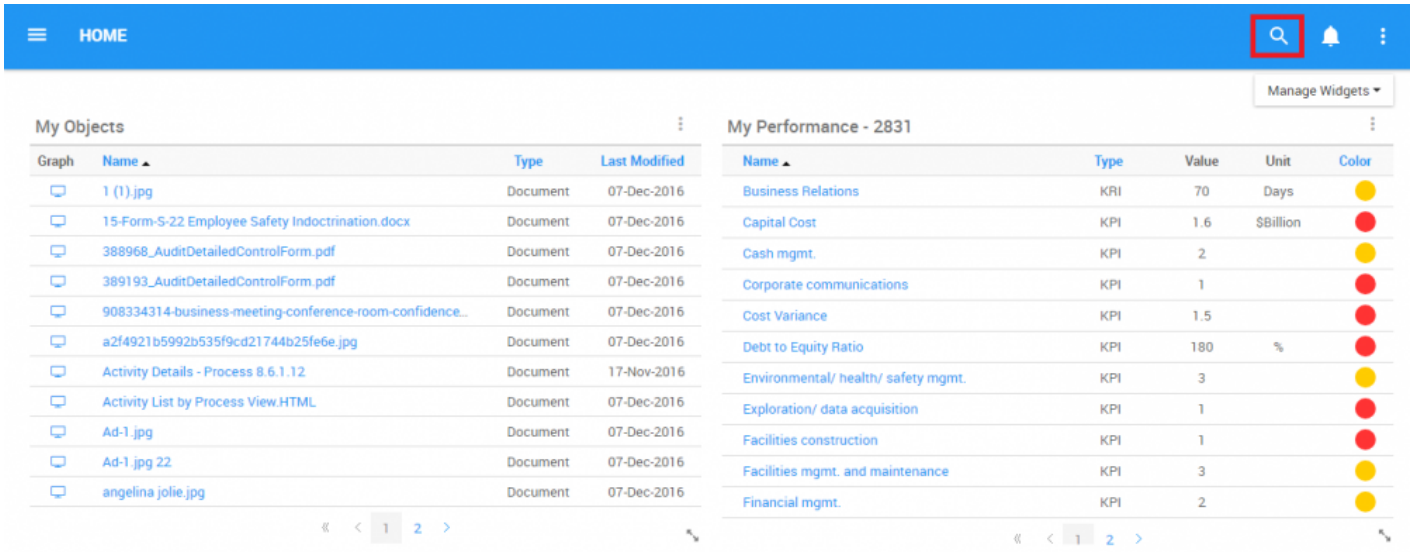
5.0 Search

Users can leverage EPC's search function to easily find items within the Web App. The search function, represented by the icon allows users to search through all uploaded items to which they have access to. This search function should be used when a user is searching for a specific item or key word.
Similar to typical internet searches, the EPC prioritizes search results based on how well the items match the item being searched.

The search results follow this hierarchy:

1. If the name being searched is featured in the title of the item
2. If the name being searched is featured in the details and description of the item
3. If the name being searched partially matches other key words within item names or descriptions

Using the Search Bar
The search bar can be accessed from any module or section of the EPC. The search icon will be displayed at the top of each page, and can be found at the upper right hand side of users' pages.



To use the search function, please see the steps below:

1. Navigate your cursor to the search icon displayed at the top of the page

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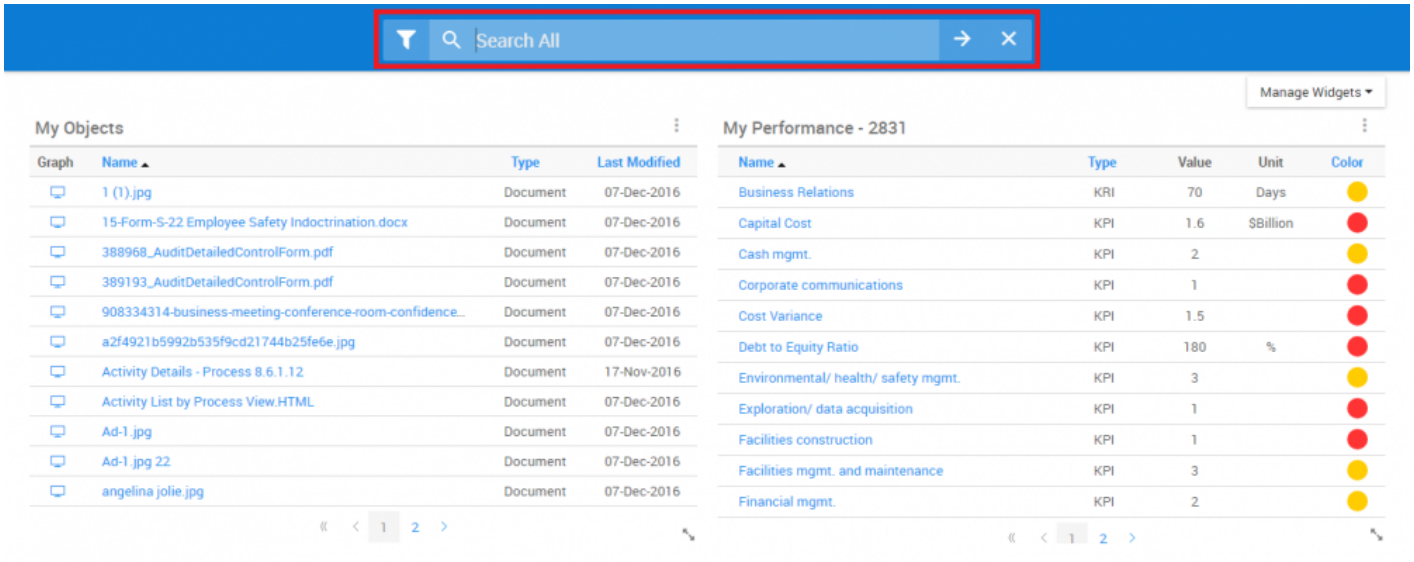
2. Click on the icon and a search bar will generate



The search bar will display 3 buttons that the user can utilize:

Item	Icon	Description
Advanced Search		The Advanced Search button allows users to further optimize search criteria. Please see advanced search section below
Search		The Search button allows users to initiate a search
Close		The Close button allows users to close the search bar

3. Type in the name you wish to search in the search bar.

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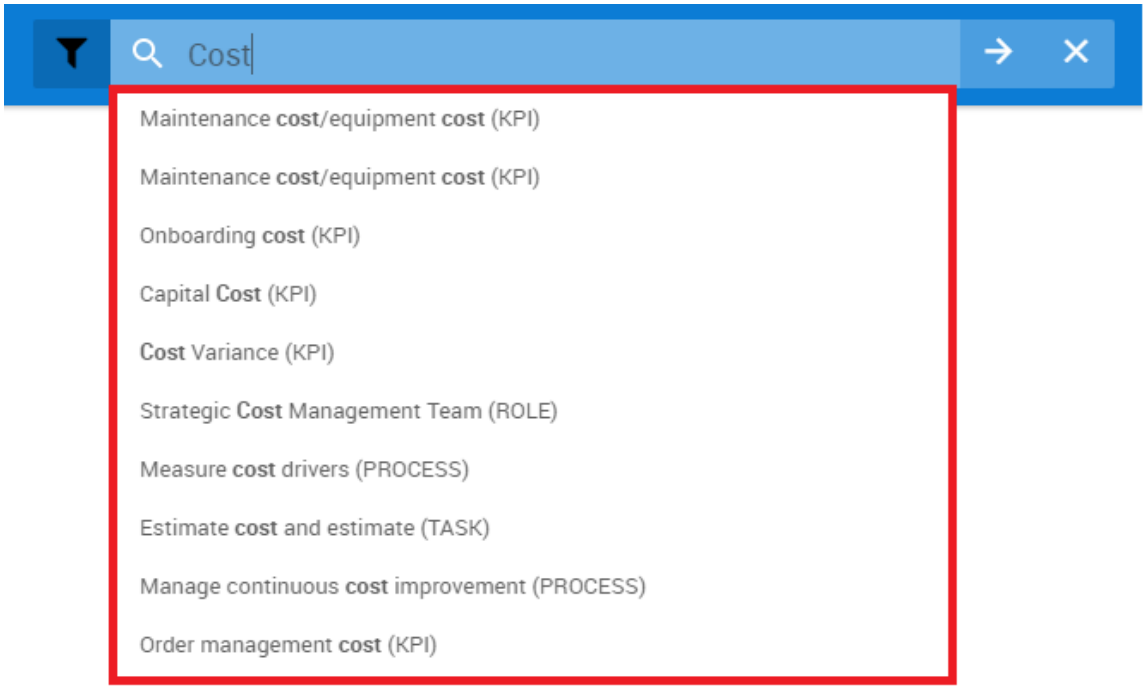
4. A quick-list of possible search matches will be automatically generated based on the initial word.



5. To execute search, press the “search” button or simply hit your enter key.

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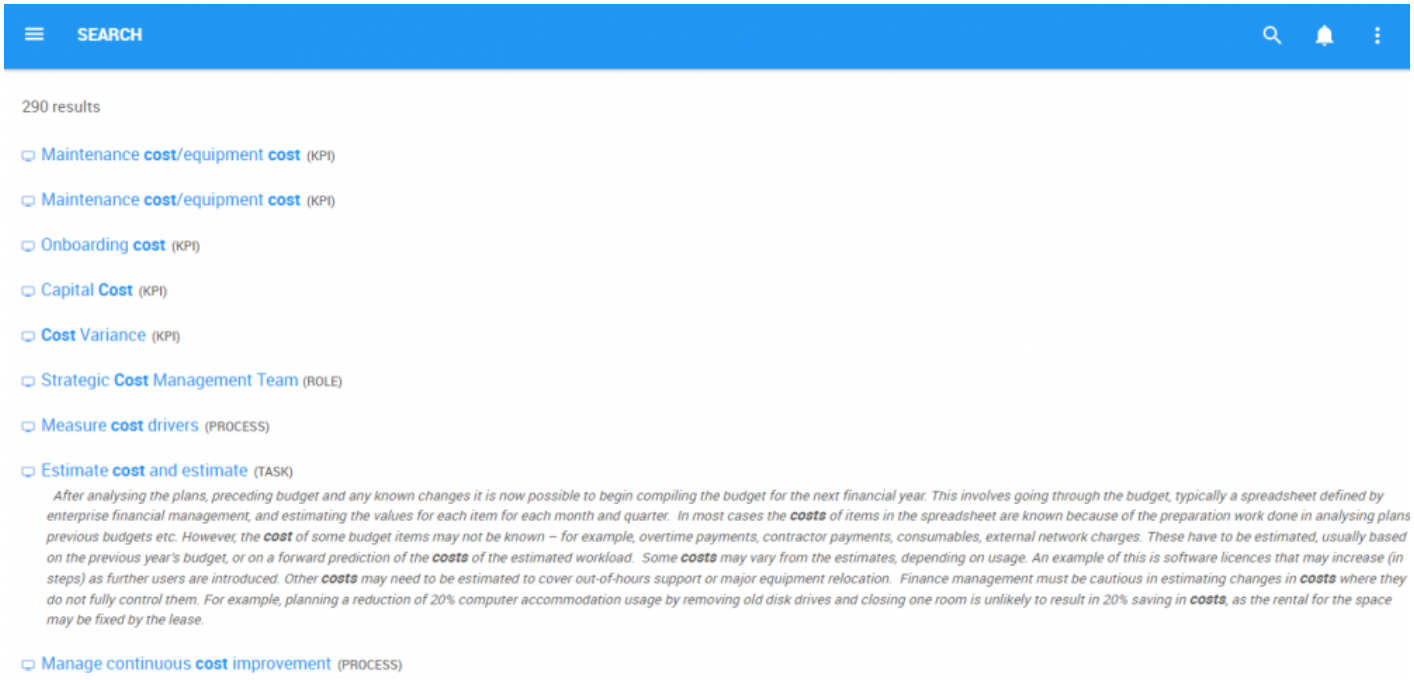
6. Users will be navigated to the following page



Item	Setting	Purpose
A	Number of Search Results	This provides users with the total number of matches generated by the search query
B	Item Classification	This shows users what the specific items are classified as

7. To navigate amongst all matched items, scroll down the page and the search results will be automatically loaded.

8. Once you have located the item you are looking for click on the item.

Clicking on the item's name in blue will navigate you to the details page. Selecting the Quick Graph View icon will navigate you to the item's Graph page.

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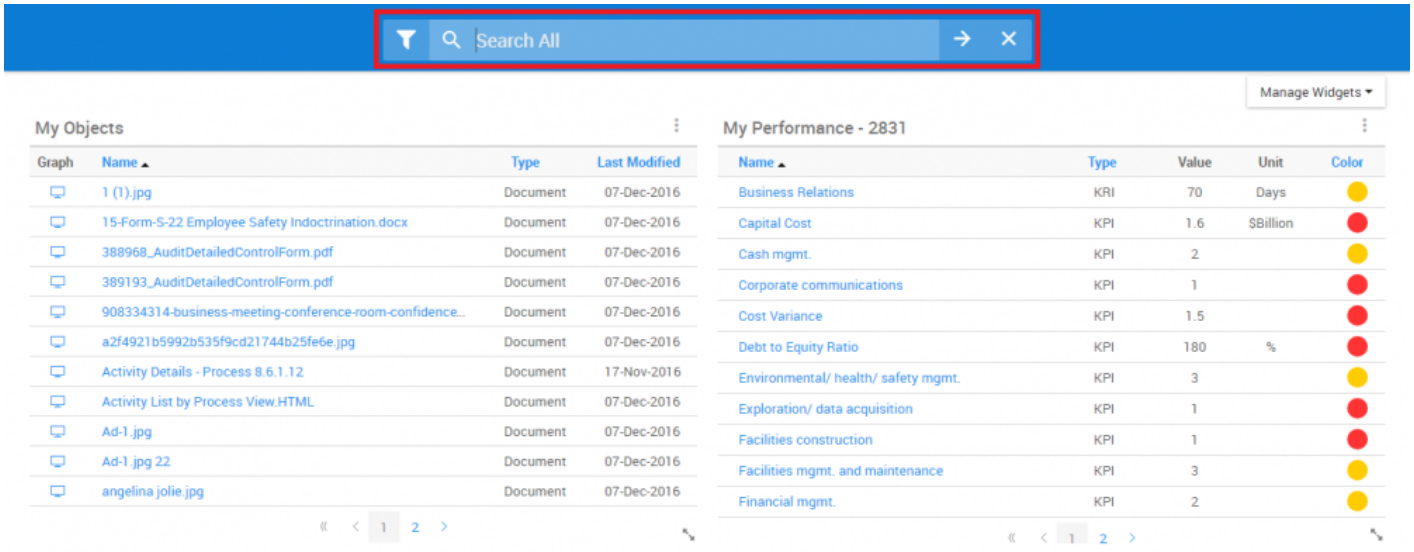
5.1 Advanced Search

Users can use the Advanced Search function to further optimize their searches, accelerating the search process by providing more relevant results.
The Advanced Search allows users to filter by **item type** and **date modified**.

To use the Advanced Search function, please see the steps below:

1. Navigate your cursor to the search icon displayed at the top of the page

2. Click on the icon and a search bar will generate



3. Select the “Advanced Search” button by clicking on the icon

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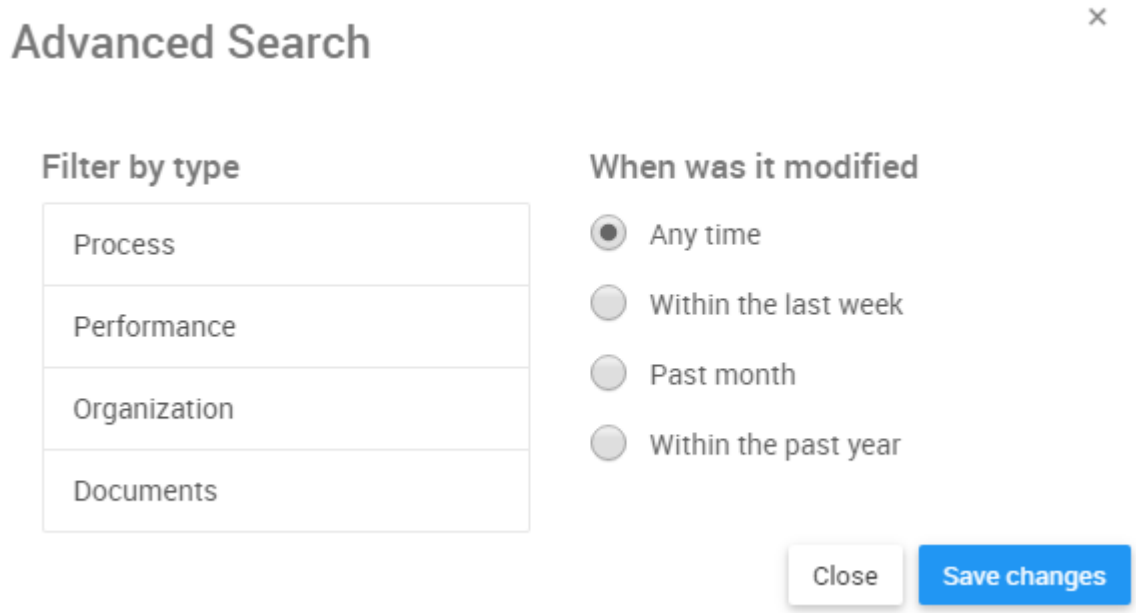
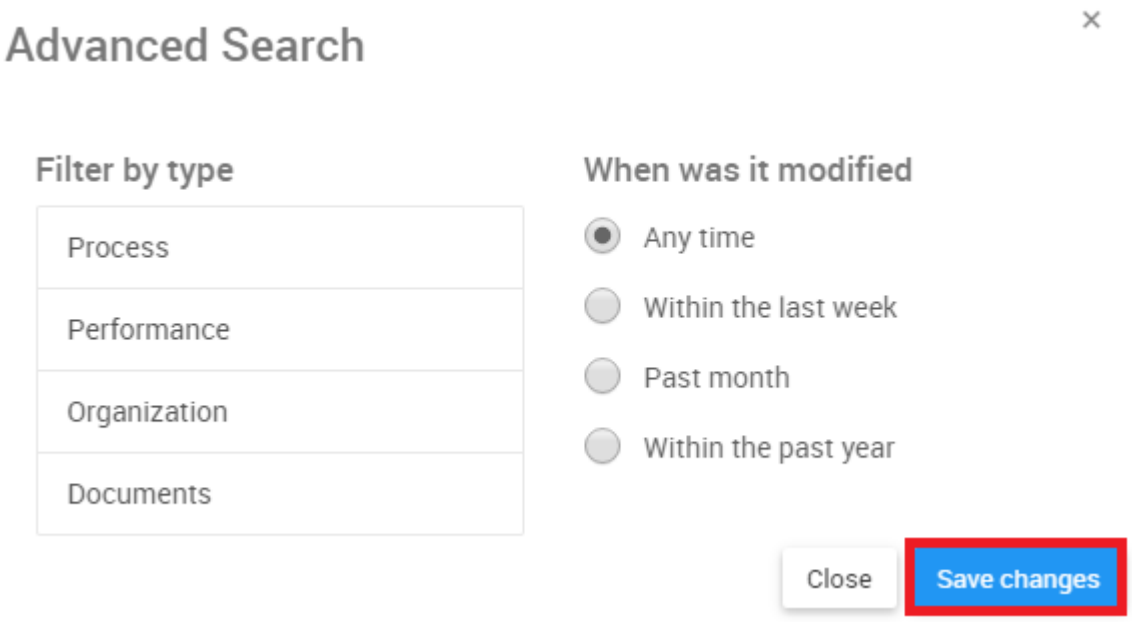
4. After clicking the icon, the following pop-up menu will be generated on a user's screen



5. Select the desired search criteria and click the "Save Changes" button



6. The selected criteria will be saved, and you can proceed to your search.

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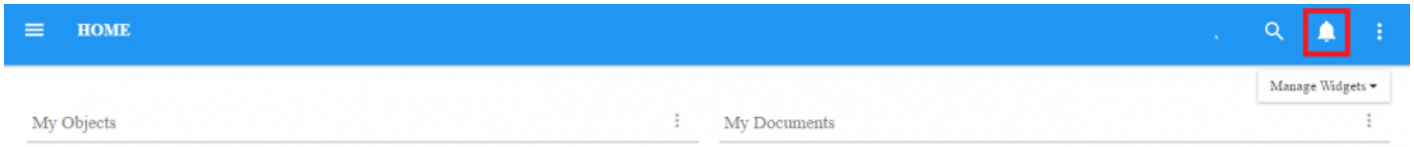
6.0 Notifications

In order to facilitate users' ability to track essential job-pertinent information, the EPC 10 Web App features notifications that are tied to users' items and responsibilities. Users are notified when events takes place, regarding items pertinent to the user in question. This allows users to keep up to date on all activity that is important to them.

Users will receive notifications in the following 3 scenarios:

1. The User has subscribed to an item undergoing an event (change, update, etc.)
2. The User has been assigned to an item using the RASCI-VS Matrix
3. The User has been assigned as an approver for an approval cycle (for further details, see section 7.0)

The notifications themselves are located within the Notifications section of the EPC Web App. Symbolized by , users can continuously access their notifications section by simply clicking on the icon featured on the navigation bar.



When users receive a notification, the notifications icon will display

a red number representing the number of unseen notifications that a user has.

Below is a compiled list of events that will generate notifications for users:

Event – Notification	Required Relation
Object Published	RASCI-VS, Subscribed
Object Deleted	RASCI-VS, Subscribed
Object Sent for Review	Assigned as approver

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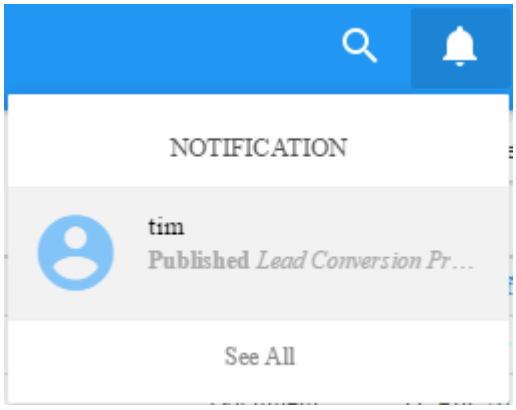
Object Approved by User	Assigned as approver on Parallel Approval Cycle, User who sent the object for Review
Object Rejected	RASCI-VS, Subscribed, Approver
Object Approved by all users	RASCI-VS, Subscribed
Object Approval Cycle Canceled	RASCI-VS, Subscribed
New Discussion	RASCI-VS, Subscribed
Reply to Discussion	RASCI-VS, Subscribed
Discussion Closed	RASCI-VS, Subscribed
New Incident	RASCI-VS, Subscribed
Reply to Incident	RASCI-VS, Subscribed
Incident Closed	RASCI-VS, Subscribed
New Question	RASCI-VS, Subscribed
Reply to Question	RASCI-VS, Subscribed
Question Closed	RASCI-VS, Subscribed
New Improvement Request	RASCI-VS, Subscribed
Reply to Improvement Request	RASCI-VS, Subscribed
Improvement Request Approved	RASCI-VS, Subscribed
Improvement Request Rejected	RASCI-VS, Subscribed
Improvement Request Implemented	RASCI-VS, Subscribed

To view Notifications, please see the steps below:

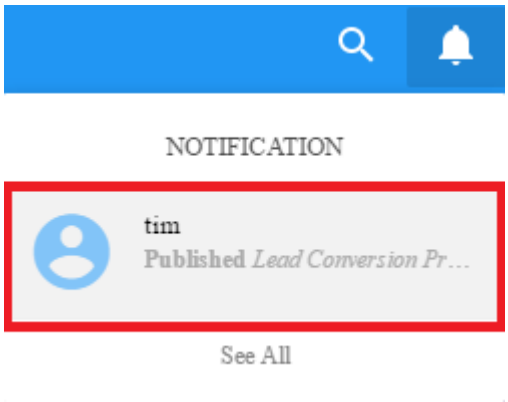
1. Login to the EPC

2. Navigate to the notification icon

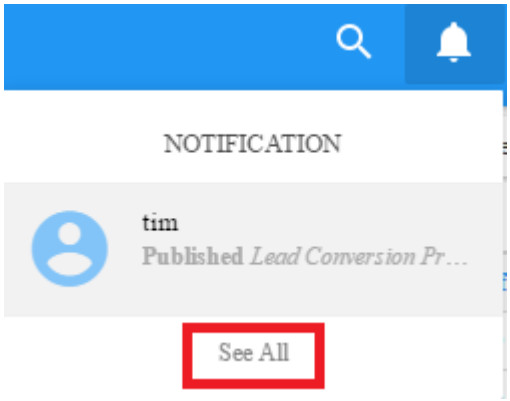
3. Click on the icon and it will generate a drop-down window



4. To navigate directly to the item generating the notification, click on the notification itself



5. To view a historical list of notifications, select the “See All” option



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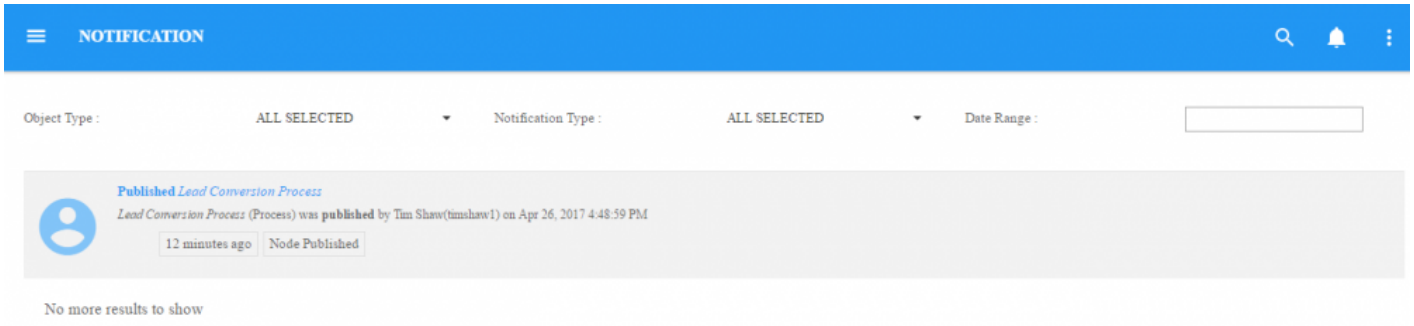
6. Users will be navigated to the Notifications Page which will provide you with a historical list of all notifications received by the user

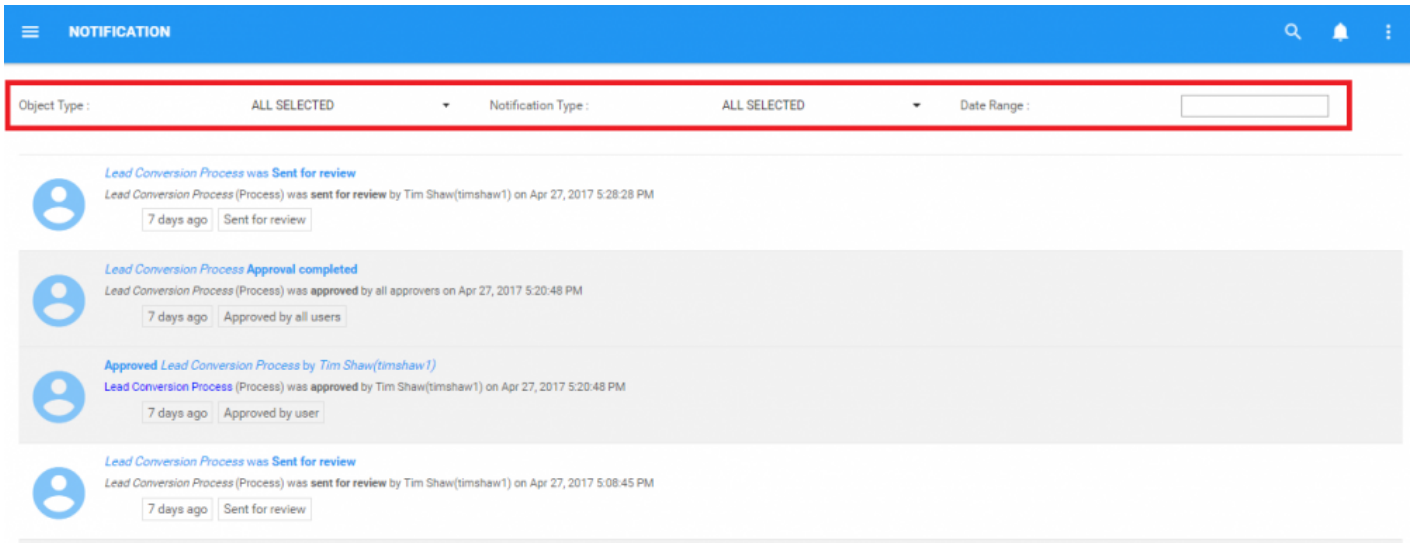


6.1 Notification Organization

Users can filter through their notifications to help themselves in finding the desired item. Using the filters within the notifications window will allow users to quickly and efficiently find the item they are searching for.

Users are provided with 3 main filters:

1. Object Type
2. Notification Type
3. Date Range



Using Object Type

1. Navigate to the Notifications page

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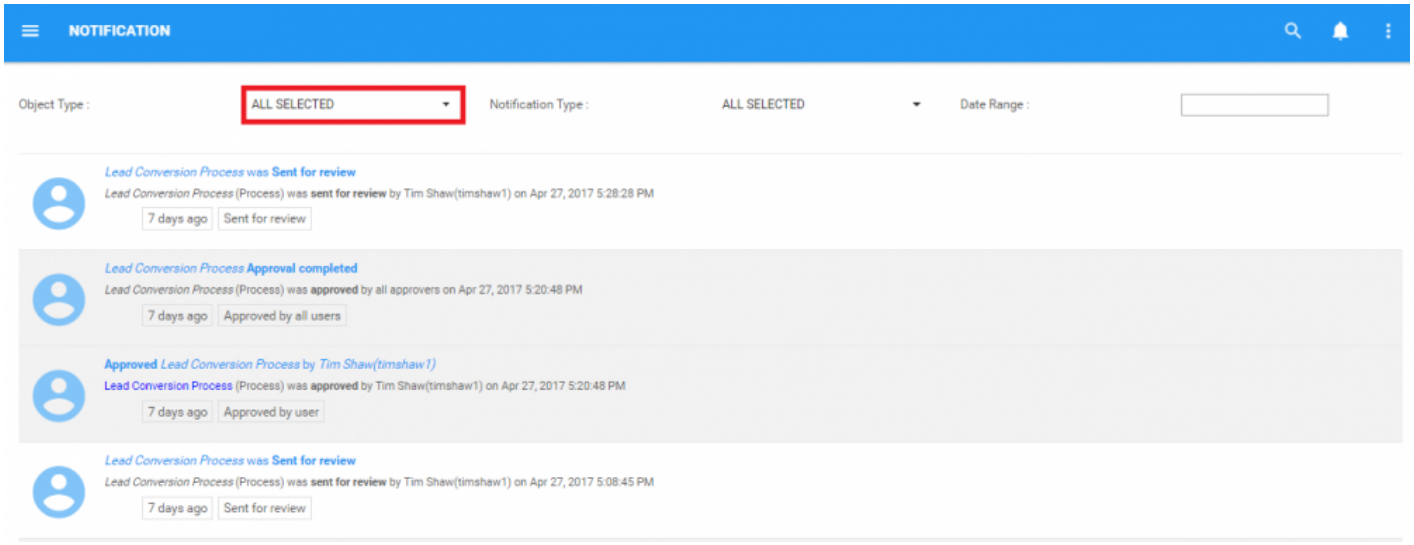
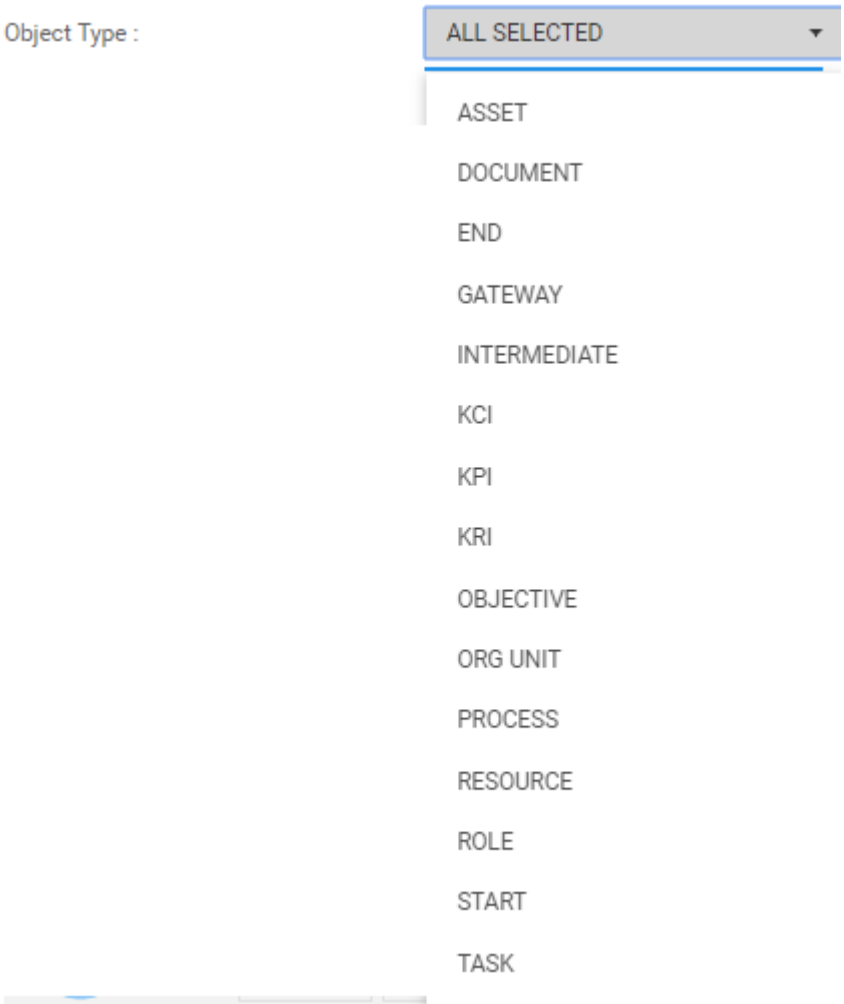
2. Select the “Object Type” Task bar



3. This will generate a drop-down menu



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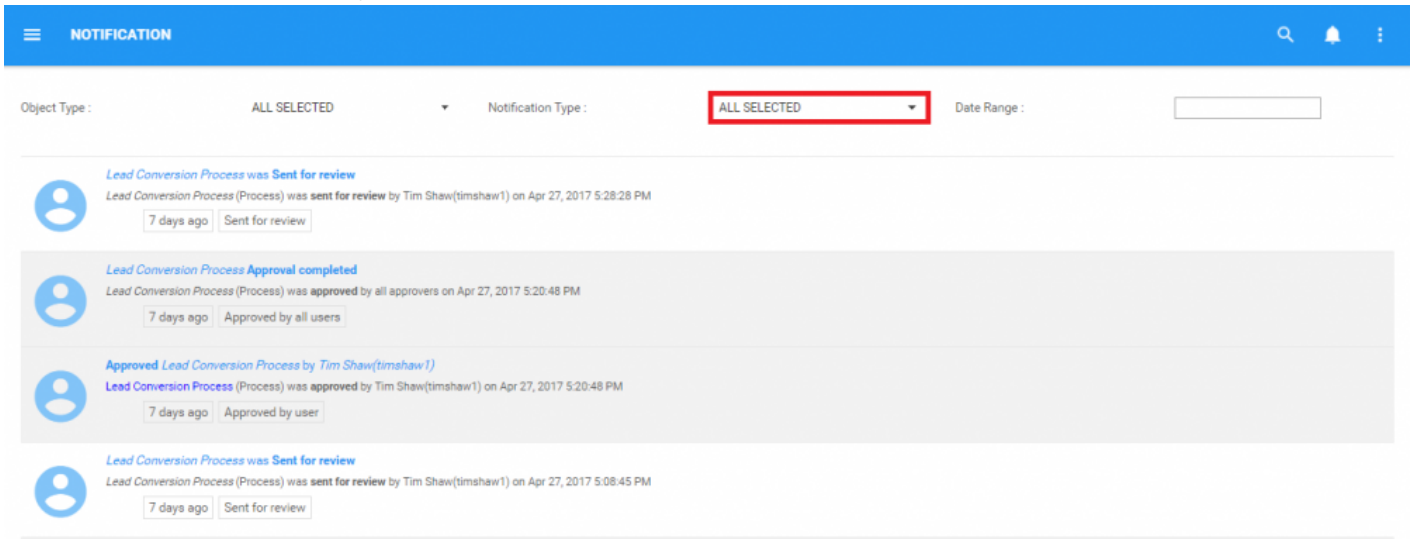
4. Select the desired Objects. Users can select 1 of multiple different object types simultaneously

Using Notification Type

1. Navigate to the Notifications page

2. Select the “Notification Type” Task bar



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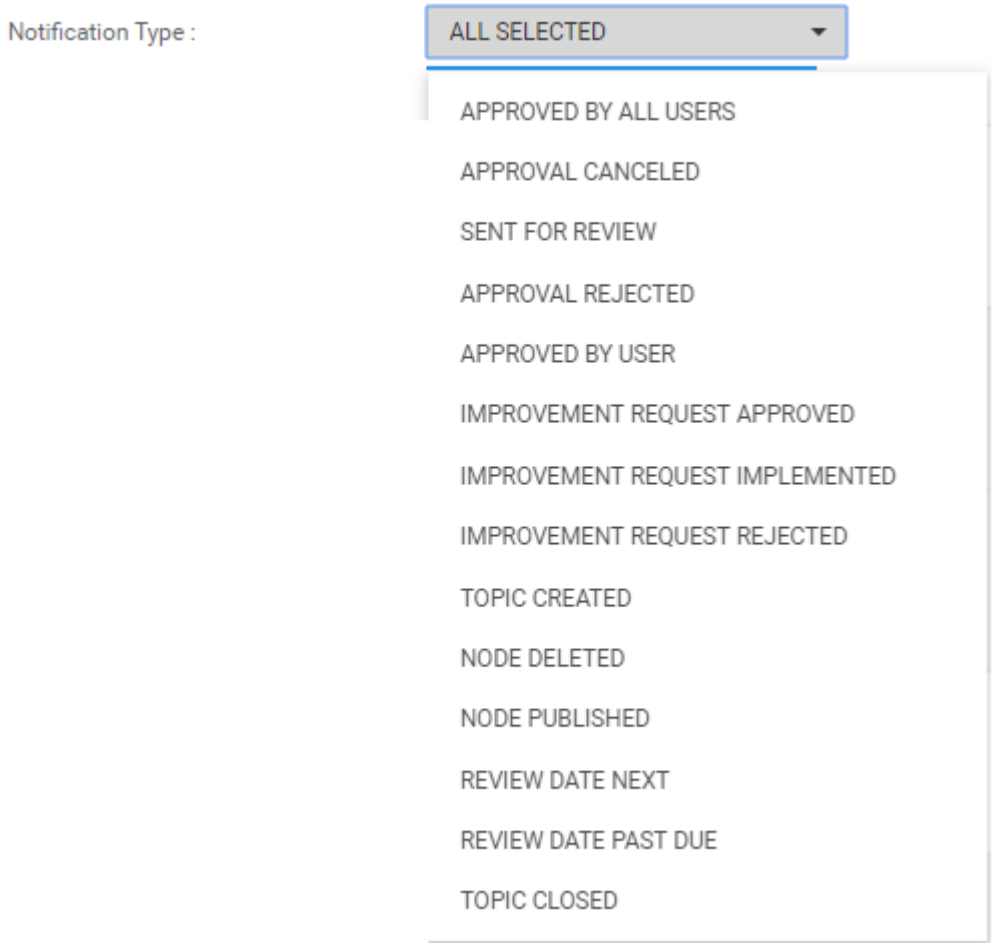
3. This will generate a drop-down menu



4. Select the desired Notification Type. Users can select 1 of multiple different object types simultaneously

Using Date Range

1. Navigate to the Notifications page

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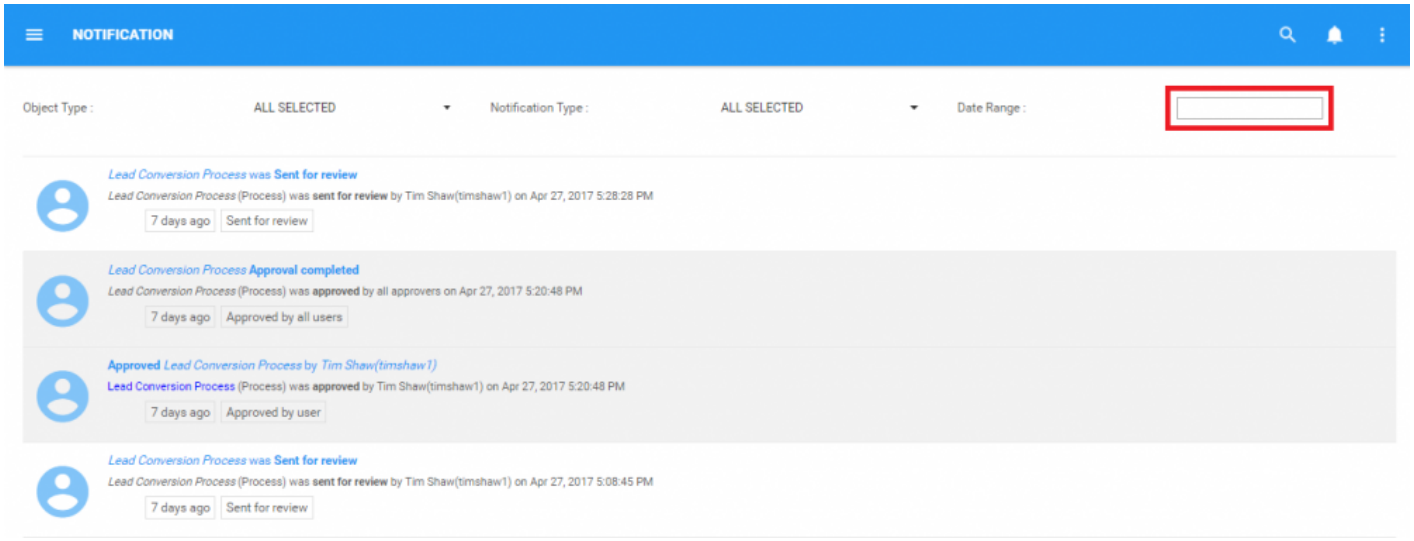
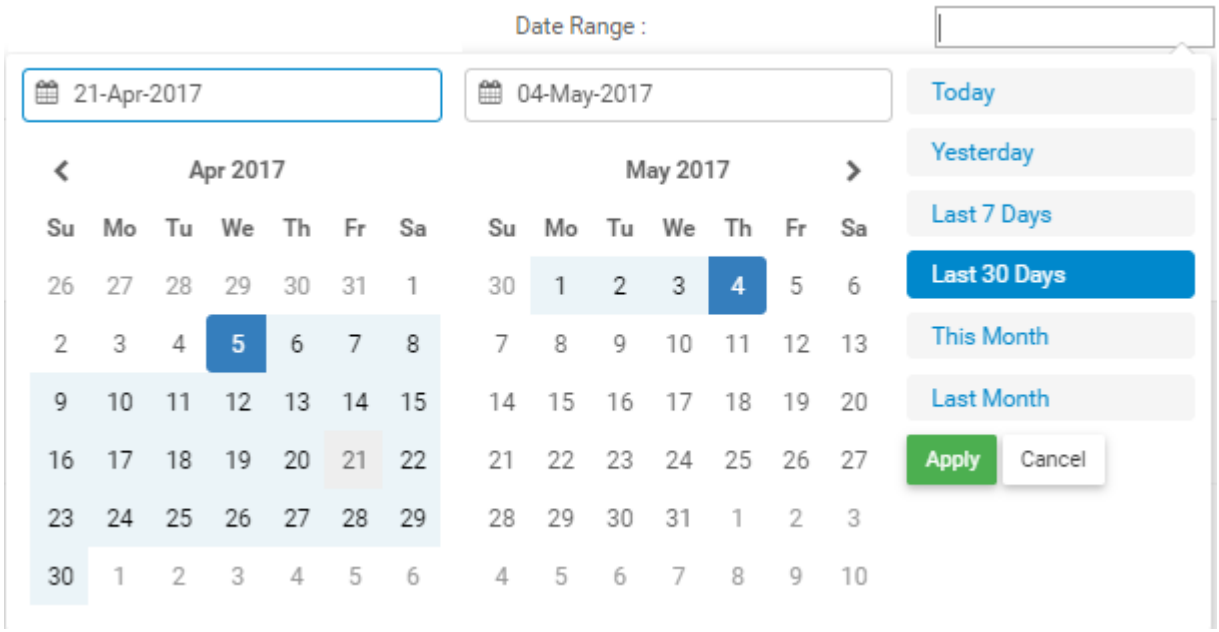
2. Select the “Date Range” Task bar



3. This will generate a drop-down menu



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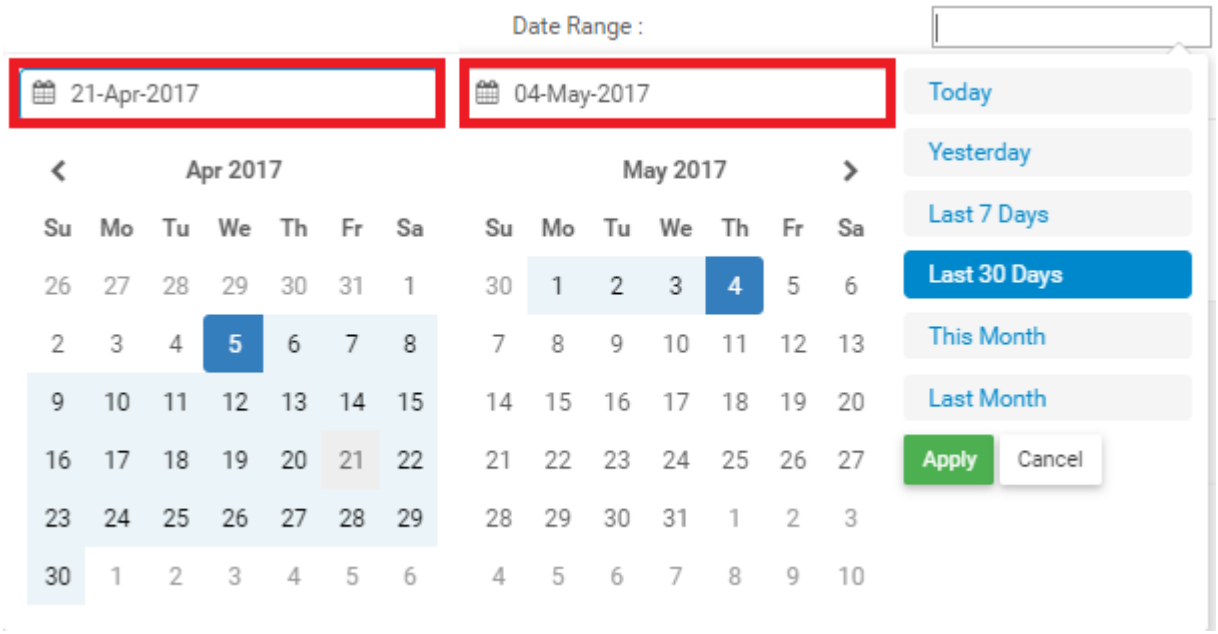
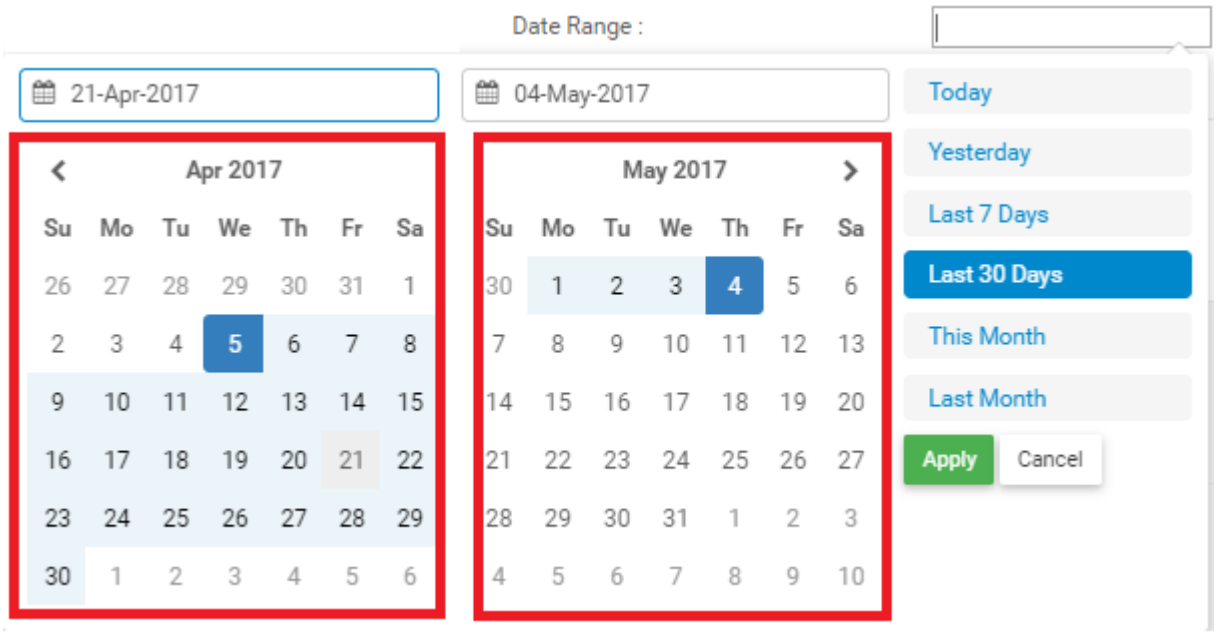
Users can manually type in the date ranges they desire:



Users can select the date range within the displayed calendar by selecting both the month and date within each calendar:



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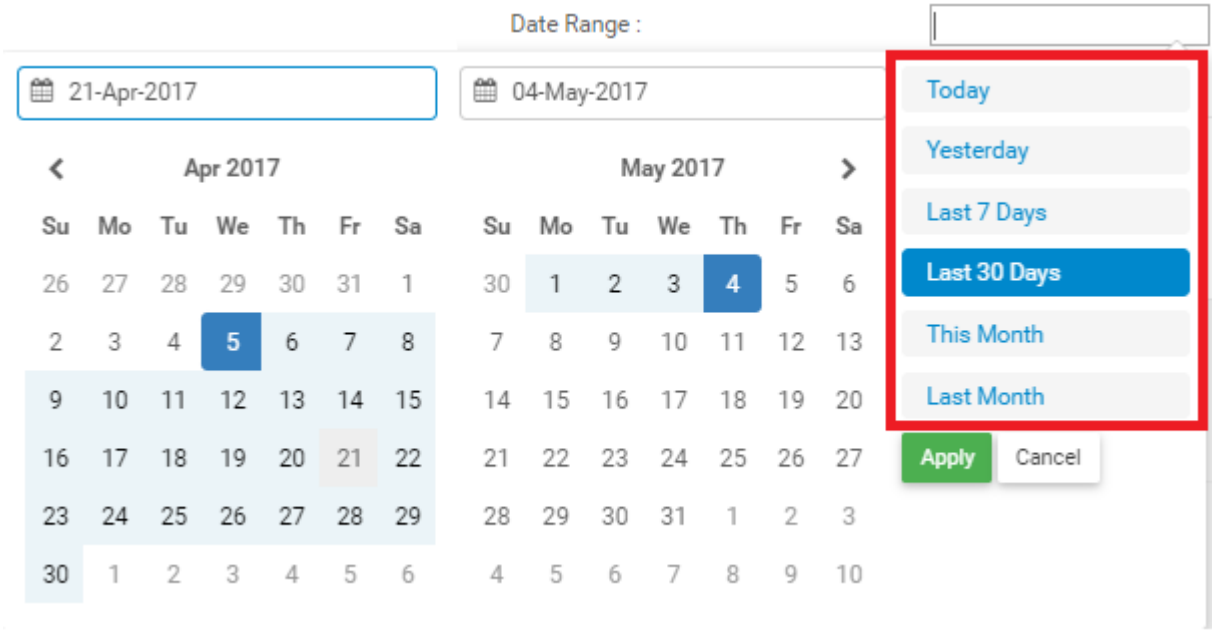
Users can also select the default date ranges:



4. Once the desired date range is selected. Click the Apply icon and the date range will be applied.

6.2 Enable/Disable Browser Notifications

Users can enable and disable browser-based notifications on their EPC Web App.

These notifications are generated by each browser, and require a different enabling/disabling process per browser. Please see the sections below for browser-specific instructions.

1. Chrome
2. Firefox

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6.2.1 Chrome Notifications

To enable or disable browser notifications for Google Chrome, please see the steps below:

1. On your computer, open Chrome.

2. At the top right, click and then Settings.

3. At the bottom, click Advanced.

4. Under “Privacy and security,” click Content settings.

5. Click Notifications.

6. Choose to block or allow notifications:

- Block all: Turn off Ask before sending.
- Block a site: Next to “Block,” click Add. Enter the site and click Add.
- Allow a site: Next to “Allow,” click Add. Enter the site and click Add.

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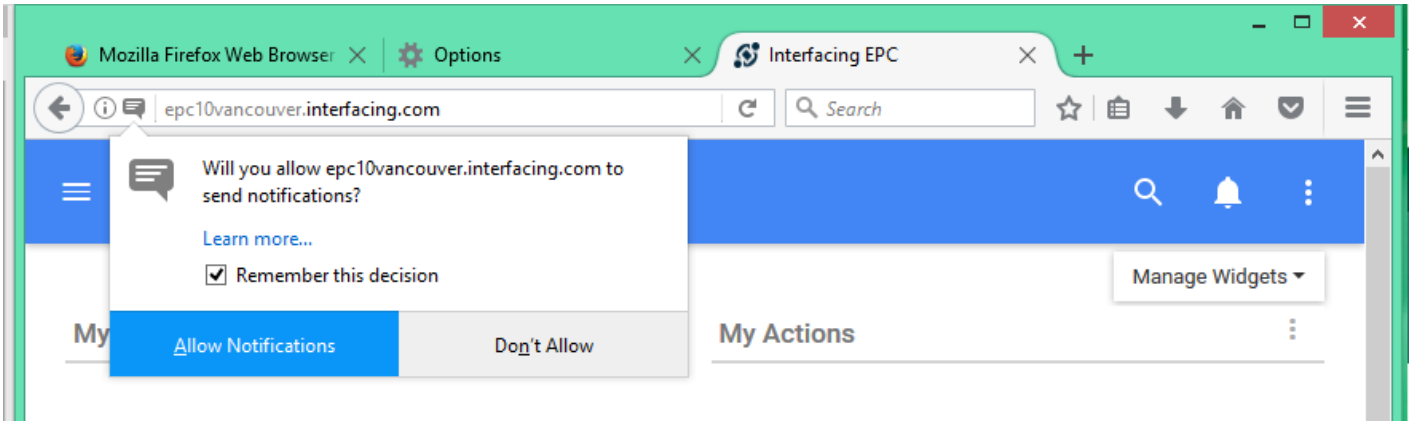
6.2.2 Firefox Notifications

Enabling Notifiations

To enable browser notifications for Mozilla Firefox, please see the steps below:

First Time Users

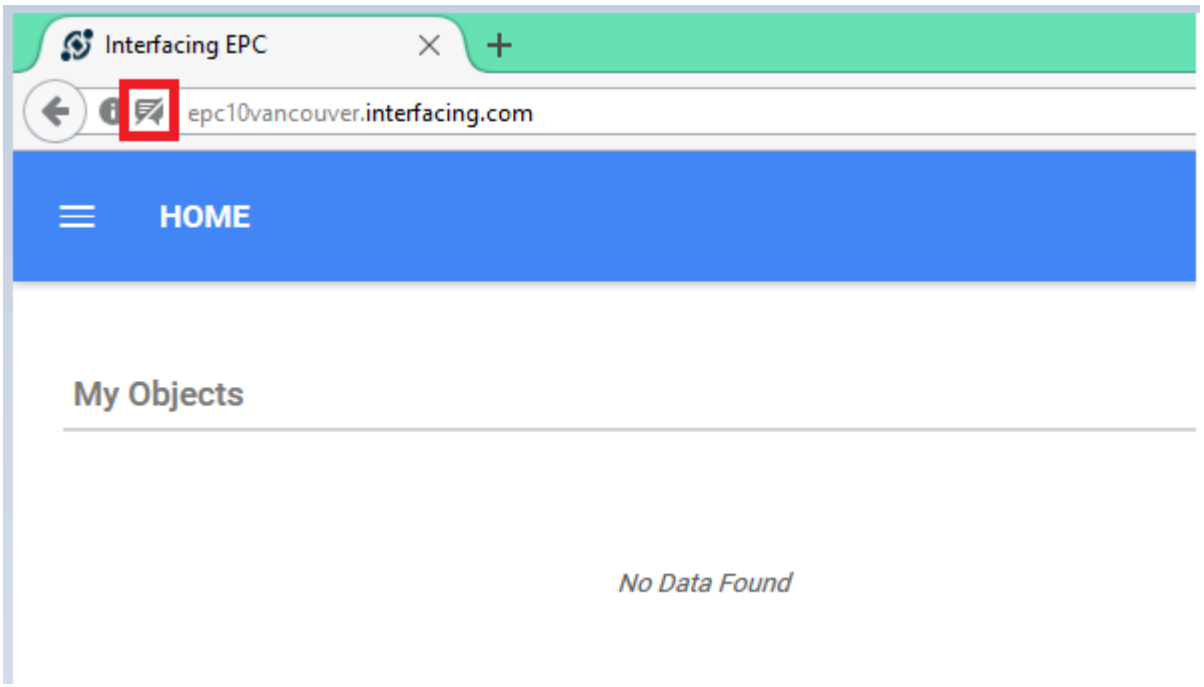
1. When logging into your EPC Web App for the first time, you will receive the following



2. Select “Allow Notifications”

Repeat Users

1. Select the “Notifications” icon on next to the URL



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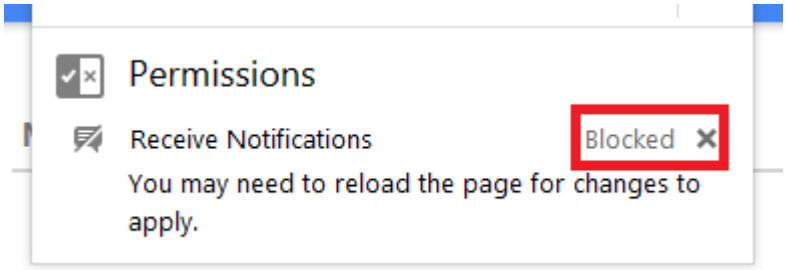
2. Click the “x” to enable notifications. Once this step is complete, browser notifications will be enabled.



Disable Notifications

To disable browser notifications for Mozilla Firefox, please see the steps below:

1. Open firefox

2. In the top-right corner, select

3. Next, select “Options”

4. Select the “Content” tab

5. In the “Notifications” section, select the “Choose…” icon

6. From here, you will view a list of websites you have enabled/disabled notifications on. Select the website you wish to disable notifications from and select the “Remove Site” button.

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7.0 Process Governance

Process governance is an important feature of the EPC Web App that enables responsible improvement of business items, processes and activities. Process governance provides various checkpoints throughout the business improvement process that assure that the individuals responsible are consulted and sign off on improvements made.

System Administrators and EPC Modelers, on the back end, can assign Roles and Resources as approvers for any item or process within the EPC. If changes are made to these items, the individuals assigned as approvers, will have to sign off (or “approve”) on the change prior before the change can be implemented.

The EPC provides 2 kinds of approval cycles:

1. **Parallel**
2. **Serial**

Within both of these approval cycles, users will be provided with visual representations of the changes being made. Users can compare and contrast the proposed change with the status quo and select the alternative they believe will be best for the organization.

The final publishing of approved requests is completed by EPC Modelers.

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7.1 Approval Cycle

Approval cycles often involve multiple individuals before changes can be implemented. This is often the case as business activities that are subject to change may affect multiple different roles and resources, requiring their consent prior to change. These approval cycles can vary dependent on the organization, and the importance of the request being made. As such, the EPC supports both parallel and serial approval cycles.

Approval Cycle	Description
Parallel	All approval requests are simultaneously sent to approvers. The changes will be approved once all approvers have approved. E.g. A request for approval is sent out to a controller, the VP Finance, and the CEO simultaneously
Serial	Approval cycle following a sequential of approvers. Approval requests are first sent to the initial approver. Upon approval, a secondary approval request will be sent to the following approver and so on. E.g. First approval request sent to a controller, then the VP Finance and finally the CEO.

Users can view changes in both Details and Graph pages

Users can access this activity:
1. Through their notifications
2. Through their My Actions Widget

Participating in an Approval Cycle

1. After an EPC Modeler has drafted a change to a process and sent this process in for review, users assigned as approver will receive a notification within the EPC Web App

. Until fully approved, a Process Improvement will be “Pending”

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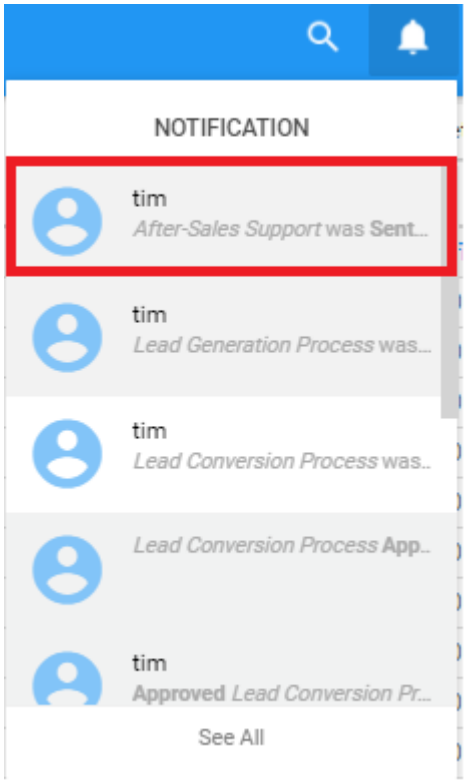
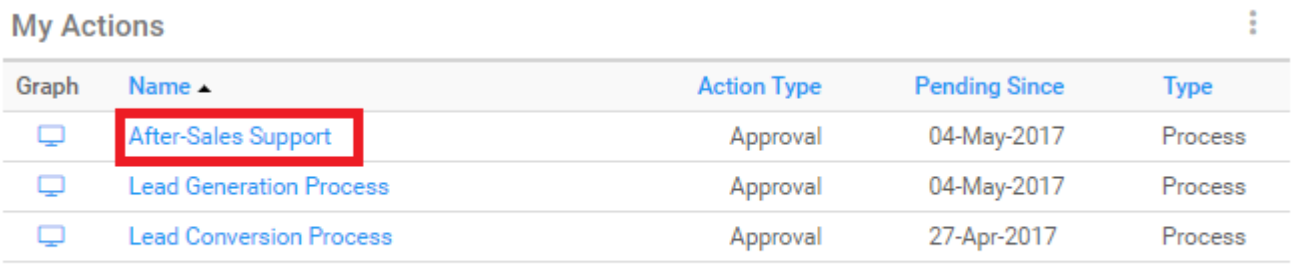
2. Users can navigate to their “My Pending Approvals” of the specific object by selecting the notification



Or through their “My Actions” Widget



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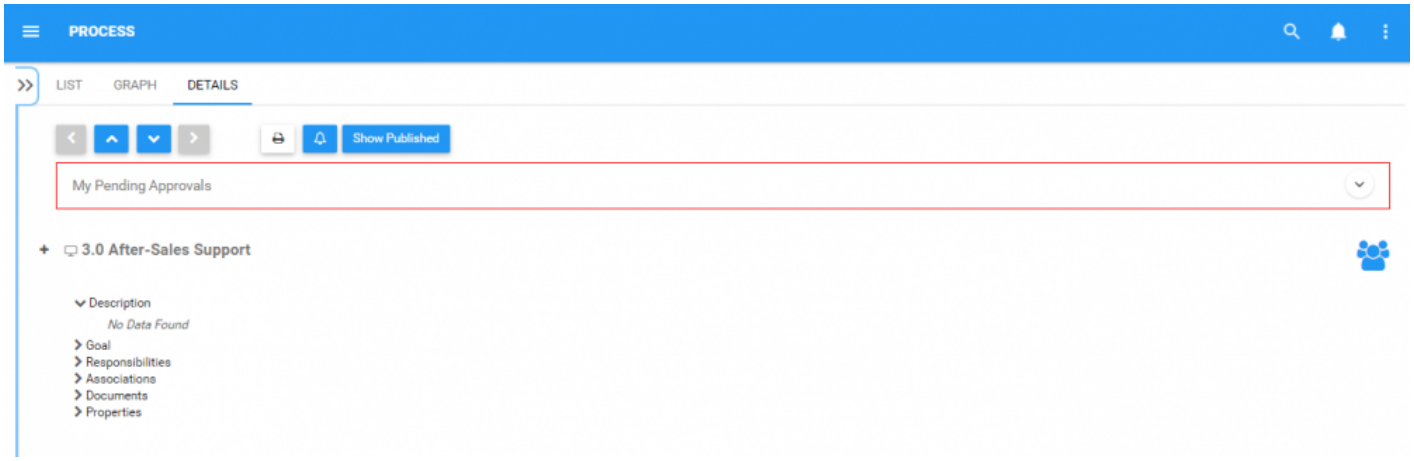
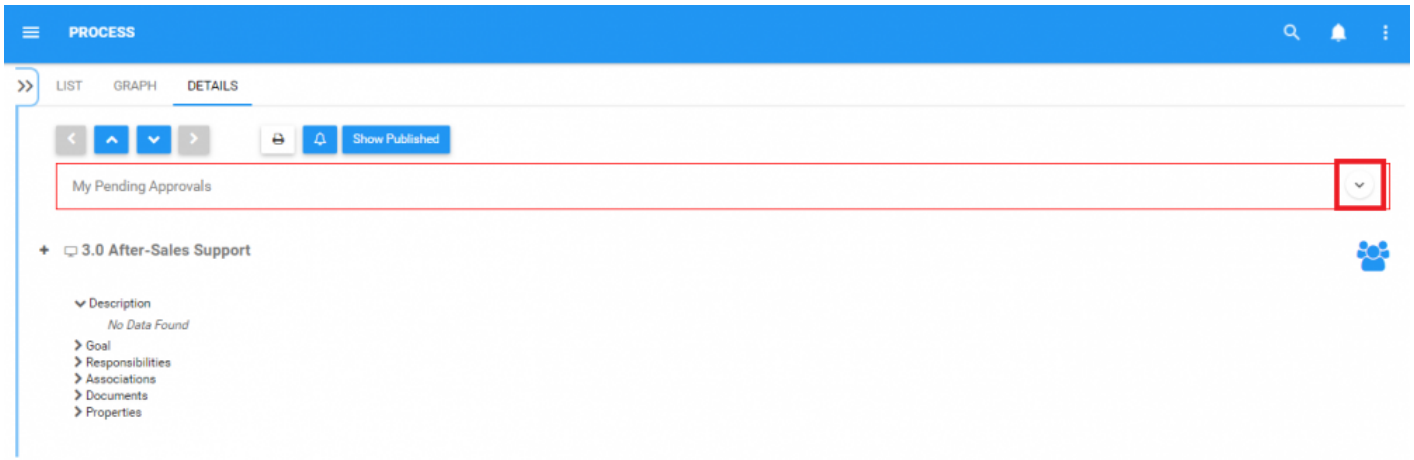
3. Users will be navigated to the item's details page



To view "Pending Approvals", users must be in "Show Latest" view. Please see Section 8.2.2 for further detail.

4. To expand the pending approval, select the icon



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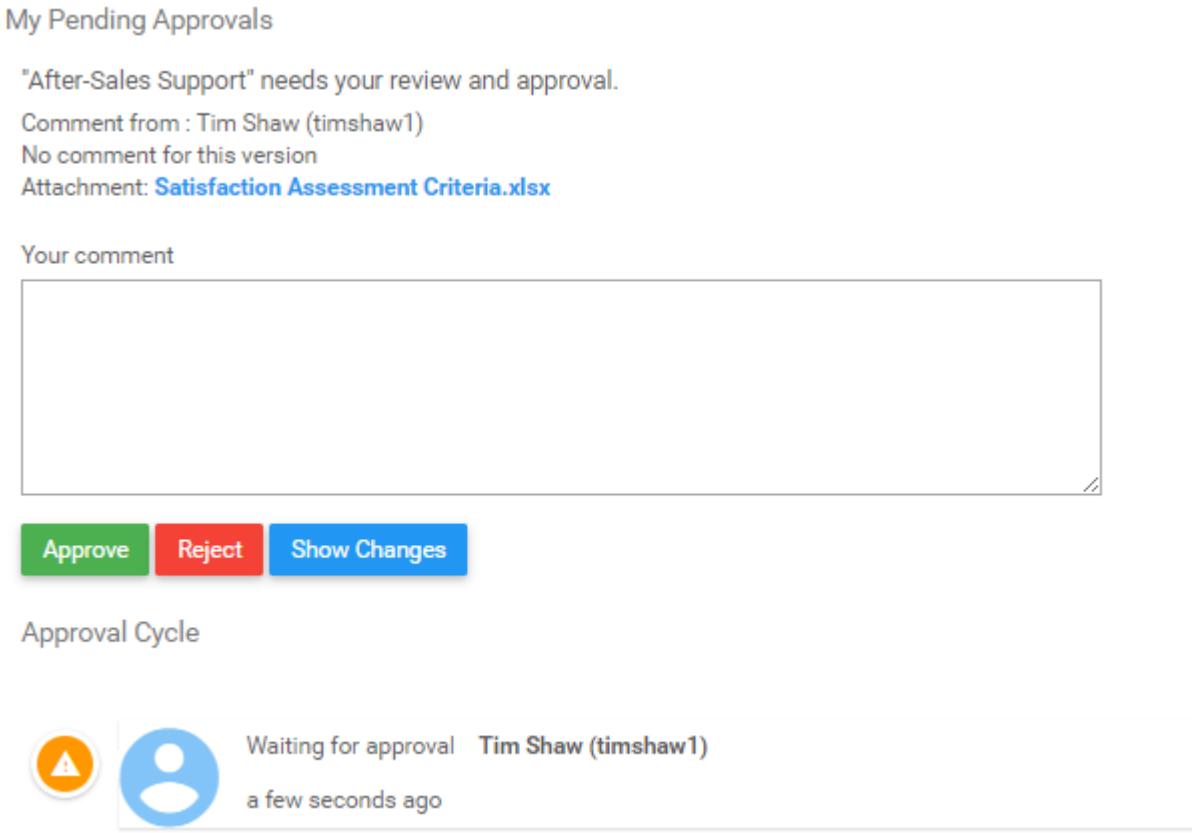
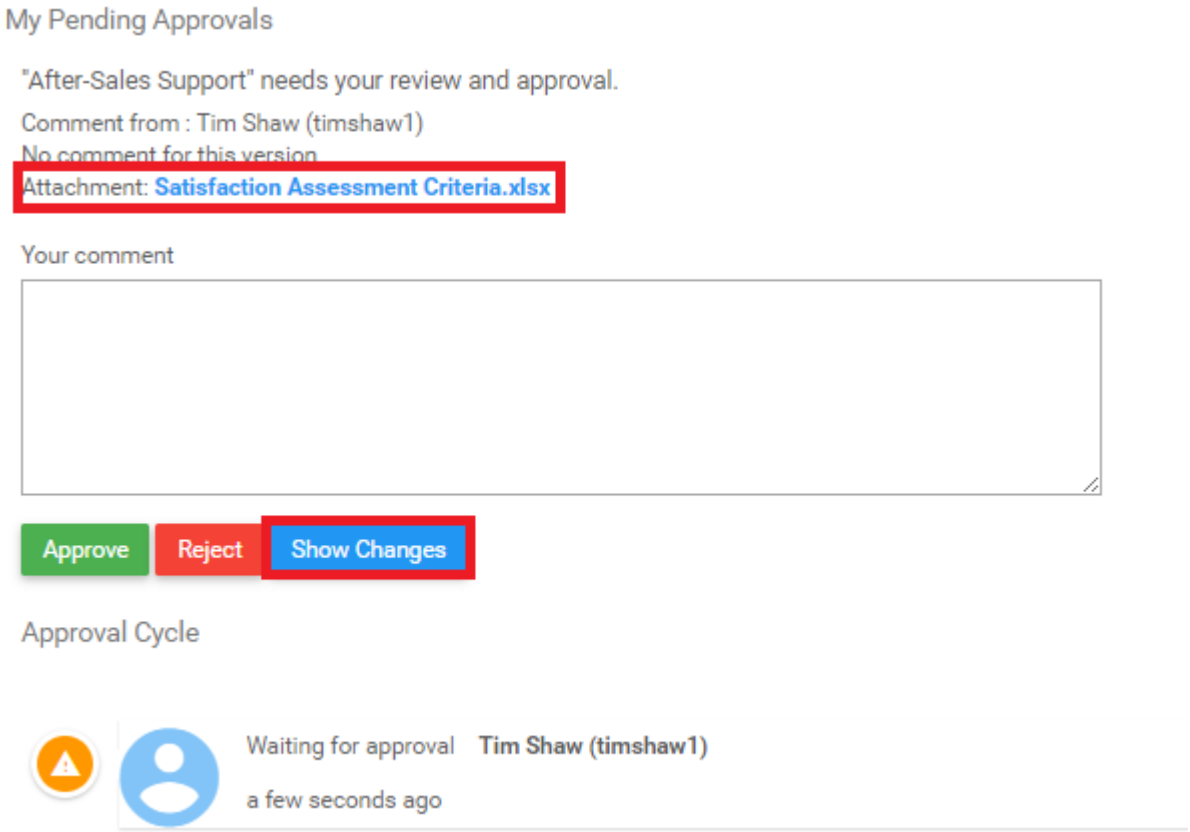
5. This will expand the Approval Request, providing the user with additional information about the proposed change



6. For further details regarding the process change, select the Show Changes button or can select the attachment provided by the EPC Modeler (if attachment provided).



7. After selecting Show Changes, the changes will be displayed on the page. The new changes will be displayed in green and the old versions will be displayed in red. As seen below, the changes to the

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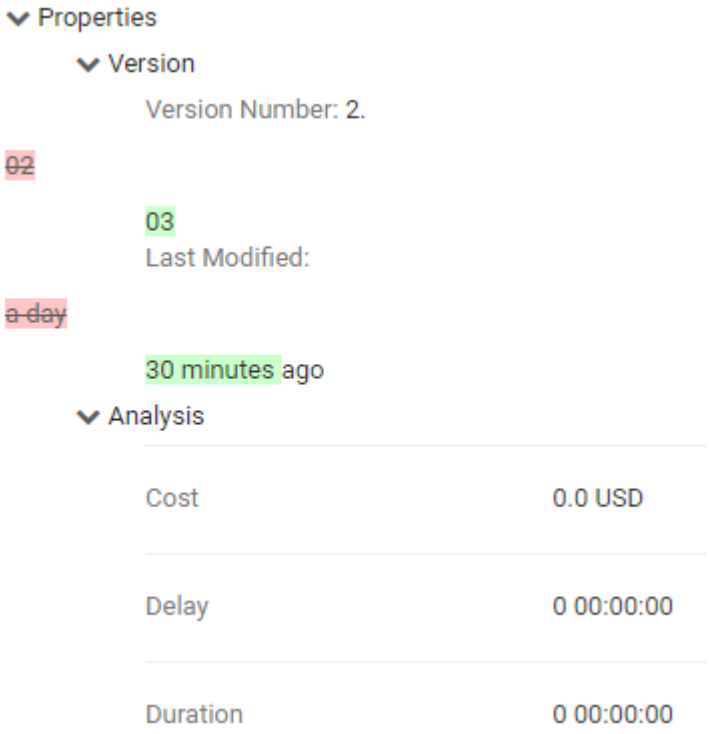
properties are displayed.



The changes will be displayed on the page you are currently featured. If you are on an item's Details page, the changes will be displayed on the details below. For graphical representation of the changes, please see the steps below.

8. Navigate to the "Graph" tab

9. Expand the "My Pending Approval" of the specific object by selecting the icon

10. Select the Show Changes option

11. On the lower part of your screen, 2 graphs will be generated with the old and newly proposed process improvement.

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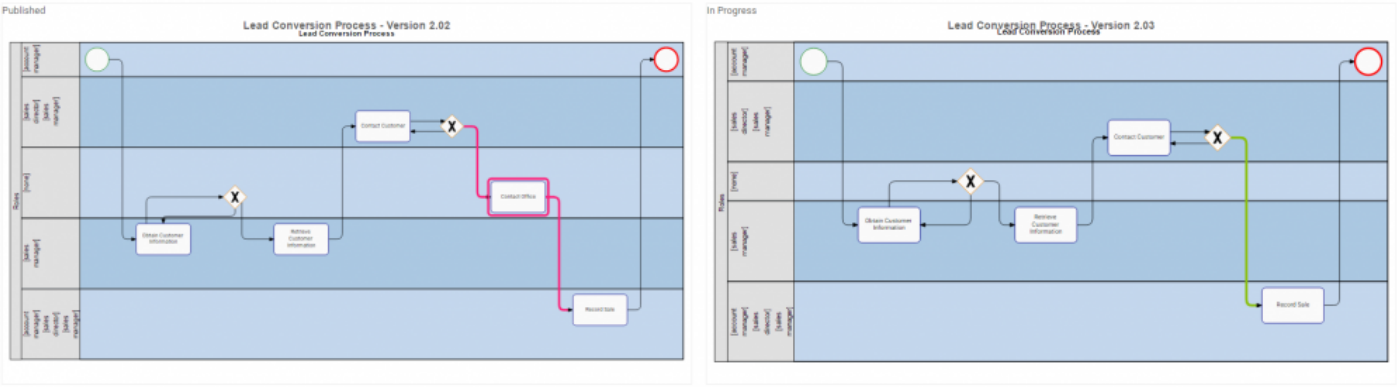

The graph generated will be based on your existing graphics. Users can compare any Process Map Graph (Map, Swimlane, Matrix Swimlane) graph with any visual configuration set within the Graph options.

12. After analyzing the proposed improvements, users can either Approve or Reject the process improvement. Once a user has acted upon the request, the Pending Approval will move to the next phase of the approval cycle.

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7.1.1 Notification Emails

Users involved in Process Governance activities will be sent notification emails when event takes place throughout the process. This means that users will be notified via email, as well as in the EPC Web App, when activities pertinent to users take place.

From: noreply@interfacing.com
To: Jay Punjabi
Cc:
Subject: [EPC] Process 4.0 Deliver Products and Services changed status to Published

Status Change Notification
Hello Jay502 Punjabi502, A
A new version of the following EPC object has been PUBLISHED. B
You can compare this new version with the previous one in its portal's "Version" tab available in the "Details" section.

Process: 4.0 Deliver Products and Services [V 1.05] C
Modified by: Jay502 Punjabi502 D
Environment: Sales Environment E

Comments: F

Note: You are receiving this notification because you are currently subscribed to this object or because you have a responsibility for this object.

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	Item	Description
A	**User**	The user being notified
B	**Activity**	The activity that has generated the notification
C	**Process**	The process being reviewed
D	**Modified by**	The user who has modified the item in question
E	**Environment**	The environment where the process is located
F	**Comments**	Any additional comments made by the user

Users will receive notifications under the following circumstances:

1. Process subject to review
2. Process being reviewed
3. Process review proposed
4. Process improvement approved
5. Process improvement published

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7.2 Confirmation

After users have approved a Pending Approval, the Request itself will automatically move to the next phase of the approval cycle. The next phase can be one of the following

For Parallel Approval Cycle

a) Wait until all other Approvers have acted upon the Improvement Requests.
b) If all Approvers have approved, the EPC Modeler will receive a notification (In their Web App Profile and confirmation email) signaling that the Improvement Request can be published.

For Serial Approval Cycle

a) An Approval Request will be sent to the next Approver in the approval cycle
b) If the final Approvers has approved, the EPC Modeler will receive a notification (In their Web App Profile and confirmation email)

Once an Improvement Request has made it through the Approval Cycle successfully, it is the responsibility of the EPC Modeler to publish the Improvement in the EPC.

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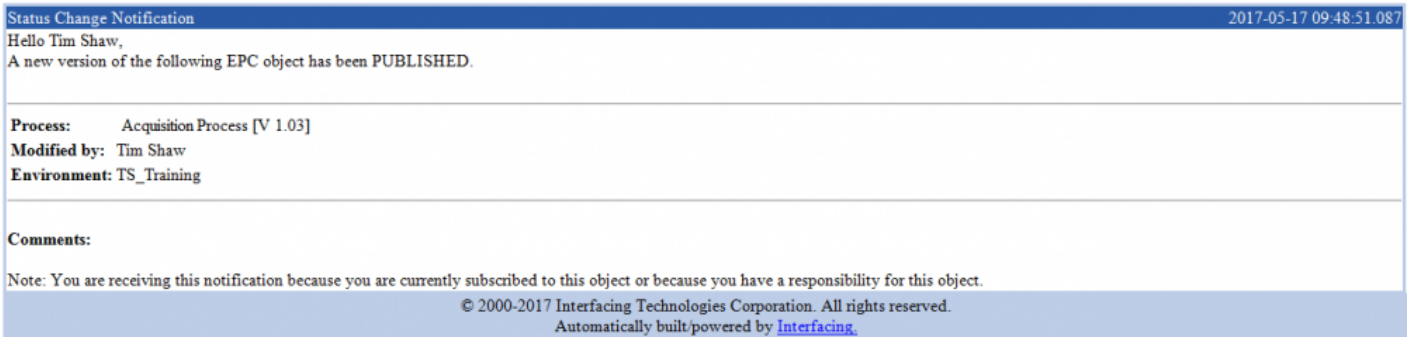
7.2.1 New Version Confirmation

Users who are associated with RASCI-VS to objects undergoing change, will receive notification of the change. This notification is designed to inform parties of changes in processes relevant to them, assuring that changes do not go unnoticed.

Users associated with the process or object undergoing change will receive:

1. Email Notification



Status Change Notification 2017-05-17 09:48:51.087

Hello Tim Shaw,
A new version of the following EPC object has been PUBLISHED.

Process: Acquisition Process [V 1.03]
Modified by: Tim Shaw
Environment: TS_Training

Comments:

Note: You are receiving this notification because you are currently subscribed to this object or because you have a responsibility for this object.

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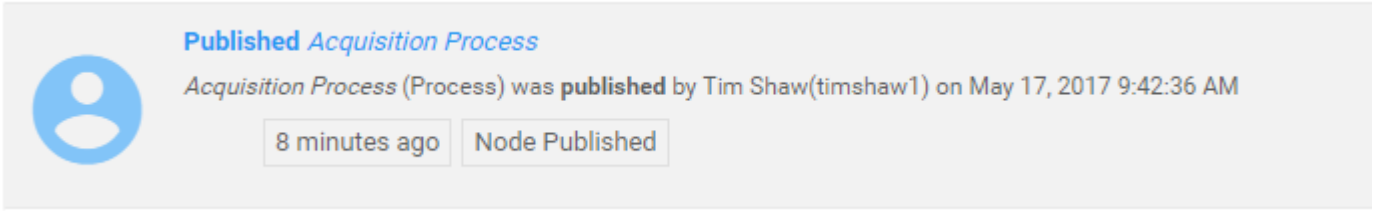
2. In-App Notification



Published *Acquisition Process*

Acquisition Process (Process) was **published** by Tim Shaw(timshaw1) on May 17, 2017 9:42:36 AM

8 minutes ago | Node Published

3. In-App Message

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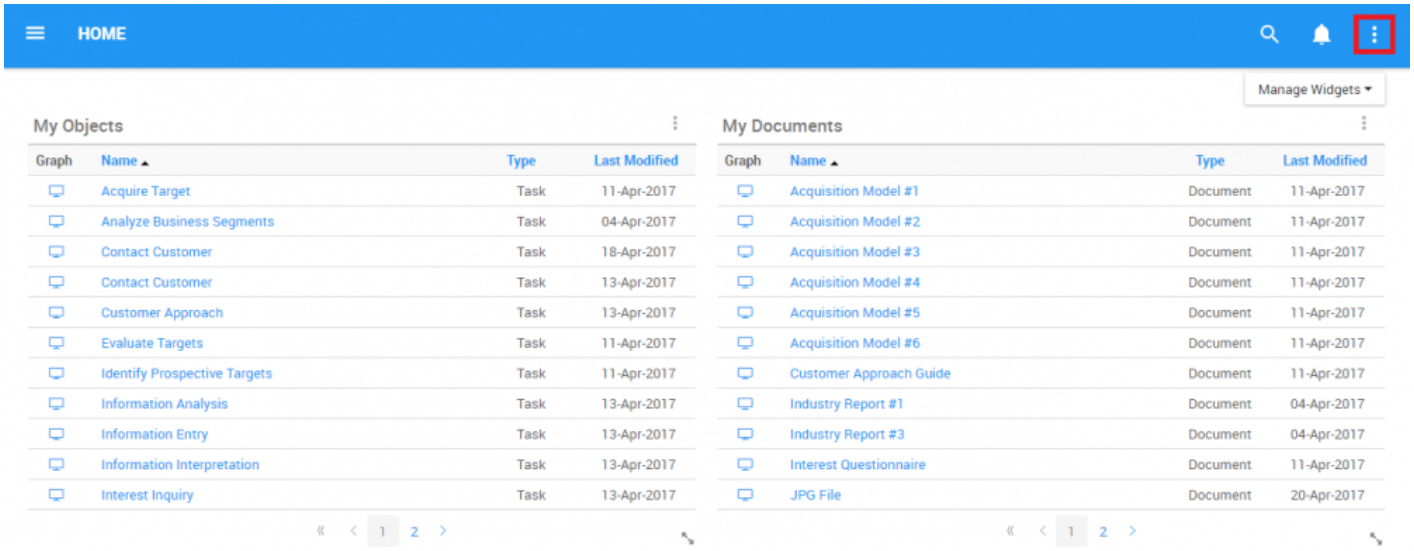
8.0 My Profile

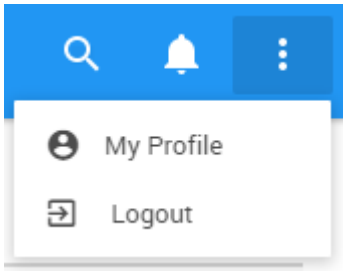
The My Profile section is where you can manage all settings related specifically to your user. It provides a central page where users can see information about their profile, as well as customizes certain sections of the EPC.

Navigate to the My Profile Page:

1. Select the button at the top right corner of the page



2. It will generate a drop-down menu



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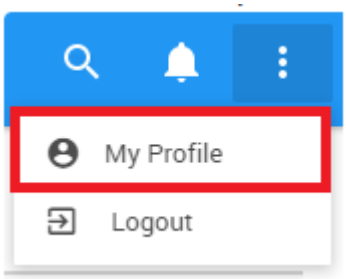
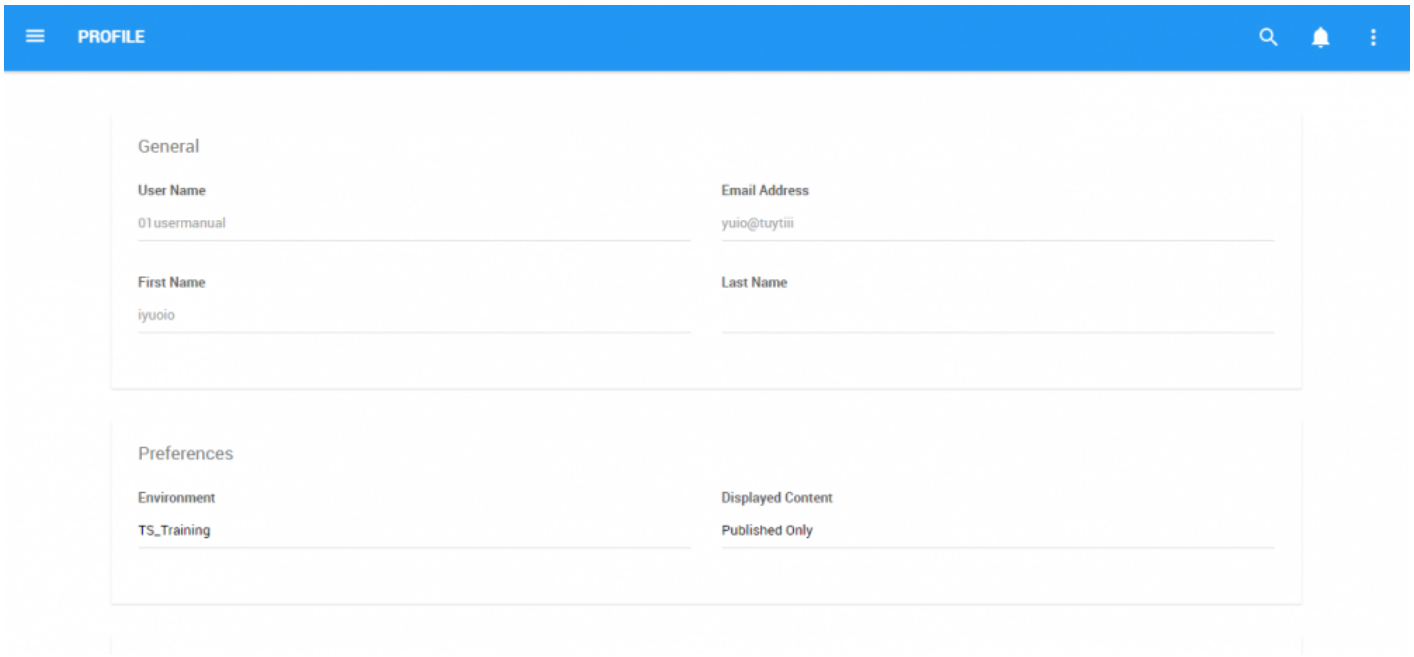
3. Click on the “My Profile” button



4. You will be prompted to your profile page



The My Profile section features 5 major components

1. General
2. Preferences
3. Language
4. Theme Roller
5. Authorization

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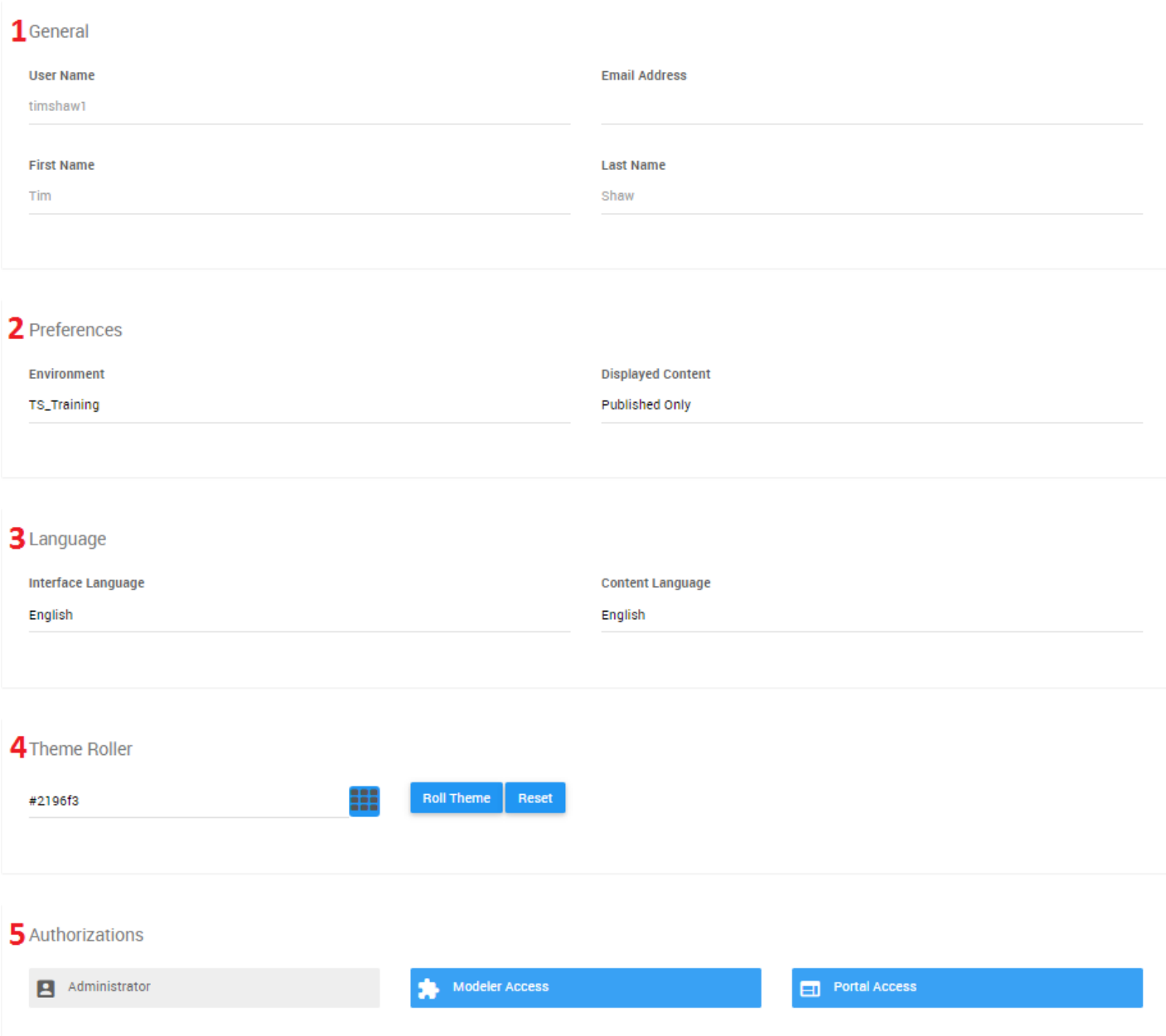

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8.1 General

The General sub-section displays general information about you. This information is uploaded by EPC Modelers and System Administrators. The information will be locked but is displayed for a user to see.

You will find the following four details:

a) User Name
b) Email Address
c) First Name
d) Last Name

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8.2 Preferences

The Preferences sub-section allows you to specify preferences related to EPC data. There are 2 main categories of preferences that a user can edit:

1. Environment
2. Displayed Content

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8.2.1 Environment

An environment is a technological container, created by the System to organize process management data on the database. Similar to a physical storage container, modelers and administrators can use environments to store different pieces of information in different environments for different purposes.

There are a variety of scenarios that would require organizations to have, or use multiple different environments

1. Production Environment
2. Test Environment

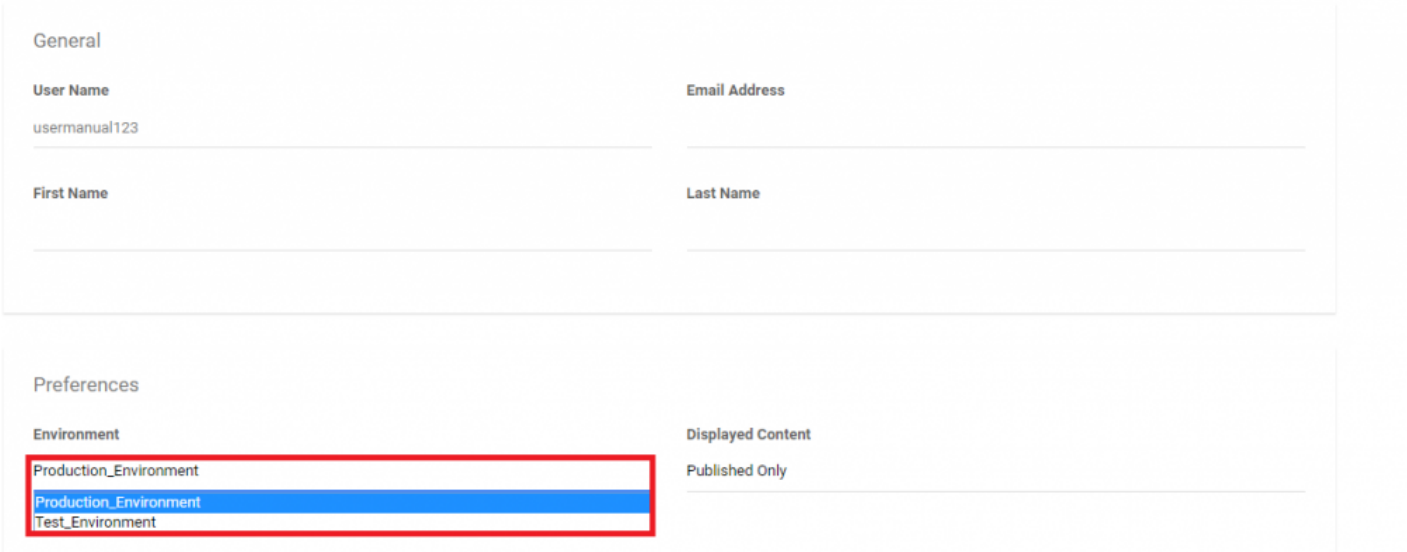
Users, when interacting with the EPC Web App, interact in 1 specific environment at a time. System Administrators control environment access and select which environments users have access to. Users can switch between different environments within the “My Profile” section of the EPC.

To toggle between environments, see the instructions below:

1. Navigate to the “My Profile” section of the EPC

2. Scroll down to the Environment section

3. Select the Environment text box



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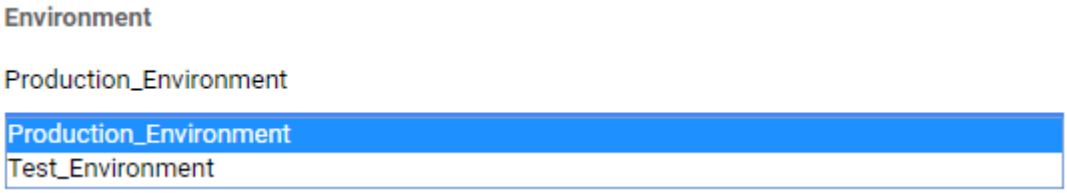
4. It will generate a drop-down menu featuring all the environments that you have been given access to.



5. Select the environment you wish to work in. The page will be refreshed and you will now be navigating this environment

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8.2.2 Displayed Content

The Enterprise Process Center works with 2 central databases containing information. The two databases are

a) Latest
b) Published

This 2-database system allows administrators and modelers to continuously work and update the EPC, while allowing end-users to be uninterrupted published information. If provided access, a user can alternative between which databases they view in the EPC.

The two databases can be further described below:

Item	Details
Published Only	Only the most current version of published object will be displayed in the EPC Web App.
Show Latest	The most current, or latest, version of the object will be displayed, whether published or in-progress.

The “Show Latest” option is reserved to EPC Administrators, EPC Modelers and Environment Admins.

To use this function, please see the steps below:

1. Navigate to the “My Profile” section of the EPC

2. Scroll down to the Displayed Content section

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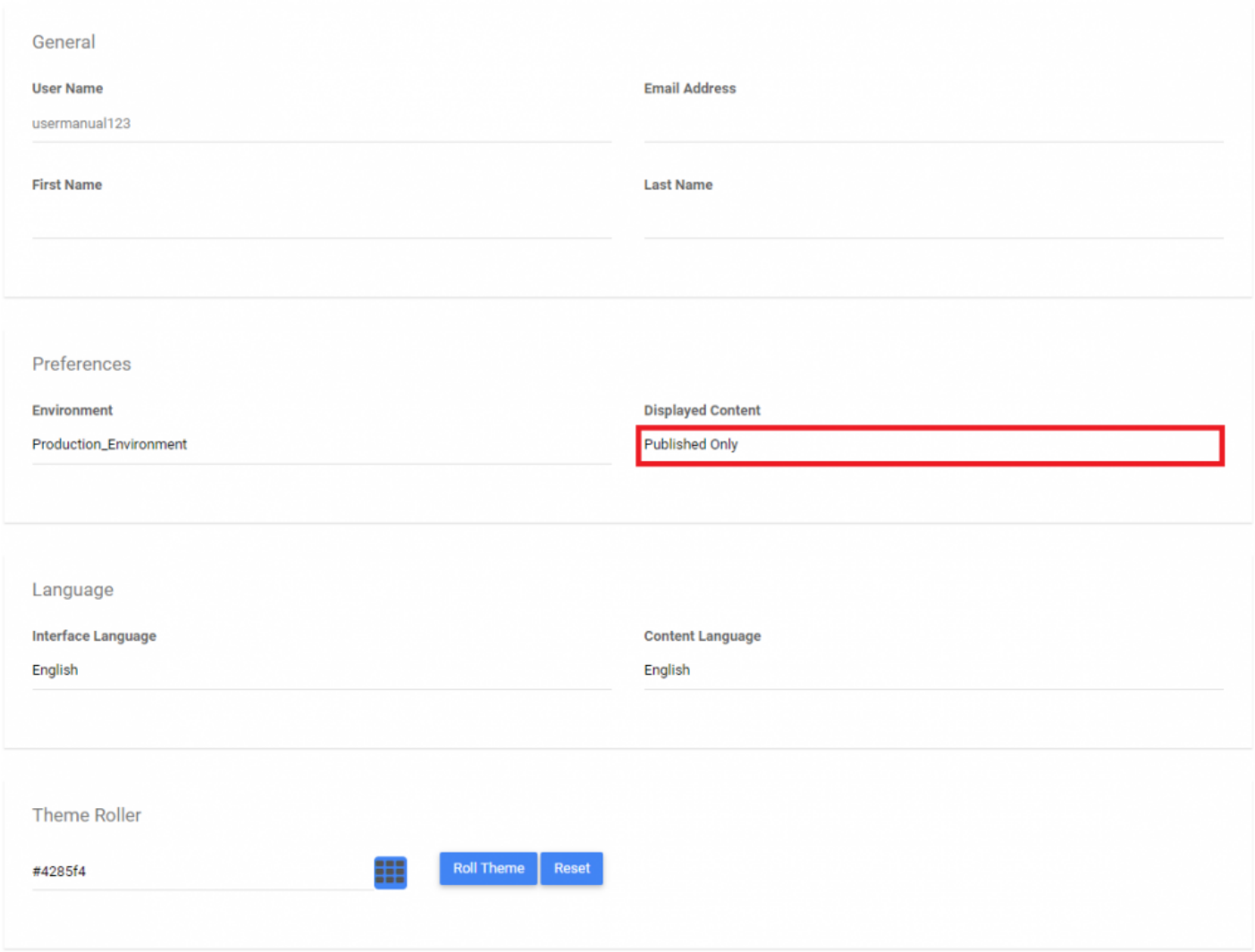
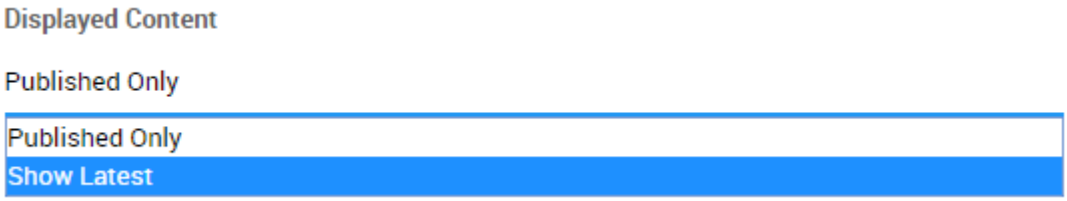
3. Select the Displayed Content text box



4. It will generate a drop-down menu featuring all the content settings that you have been given access to.



5. Select the content setting you wish to navigate. The page will be refreshed and you will now be navigating this content setting.

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8.3 Language

This section allows you to define your language preferences. Users will be able to alternate between any languages that their organization has within their EPC. Users have the ability to select which language will be displayed for their Interface and Content.

Item	Details
Interface Language	Defines the language of your EPC user interface.
Content Language	Defines the language in which content, uploaded by system administrators and modelers is displayed

Interface Language and Content Language do not need to be the same.

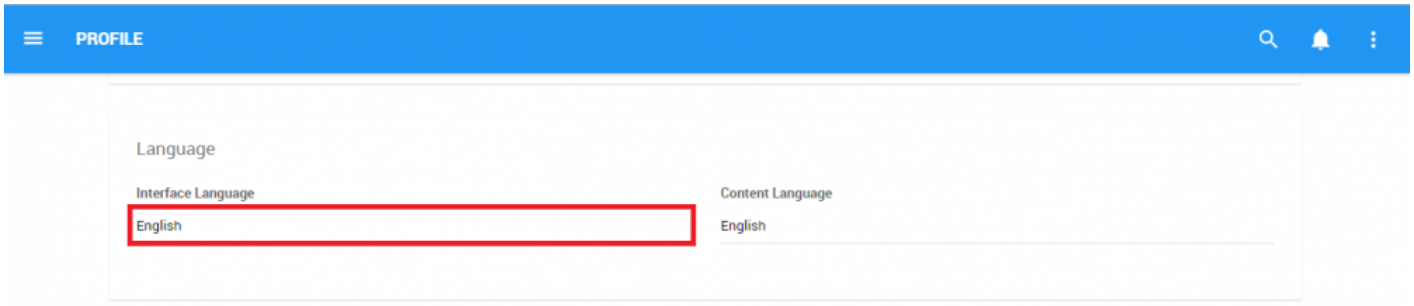
The EPC data must be translated into the selected language in order for it them to appear in that language in the Web App. **Note that this requires a Multi-lingual EPC license**.

To toggle between languages, please see the steps below:

1. Navigate to the “My Profile” section of the EPC

2. Scroll down to Language section

3. Select a Language text box



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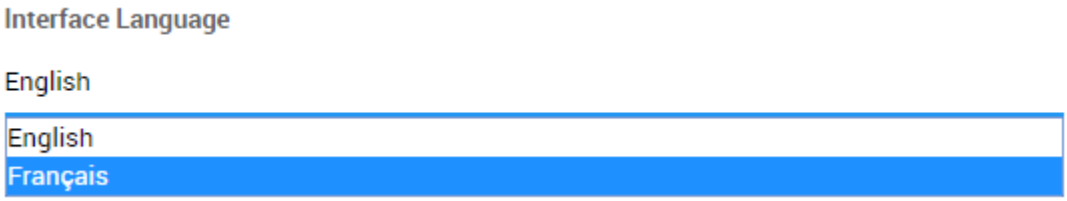
4. It will generate a drop-down menu featuring all the languages that you have been given access to.



5. Select the language you wish to display. The page will be refreshed and you will now be navigating the selected language.

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8.4 Theme Roller

The theme roller allows users to edit the color that their EPC Web App displays. The specific color being displayed is represented by an alphanumeric code in the text box.

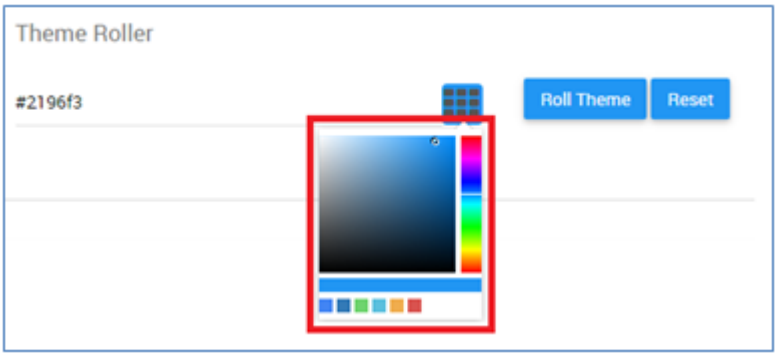
Please see the following instructions to change the color of your EPC Web App

1. Navigate to the “My Profile” section of the EPC

2. Scroll down to Theme Roller section

3. Select the icon

4. It will generate a drop-down menu featuring a color select window



5. Users can select between the color bar a), shade b) and from c) recent colors by clicking on their desired selection

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a.

b.

c.

6. Select to color you desire. It will enter a new alphanumeric code in the text box.

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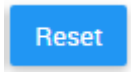
7. Select the “Roll Theme” button to apply the theme

8. The page will be reloaded and the new theme will be applied

To revert back to a former or default color, you can

i. Select the “Reset” button 

ii. Select the desired color from the “Recent Color” bar

iii. Enter in the default alphanumeric code – **#2196f3**

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8.5 Authorizations

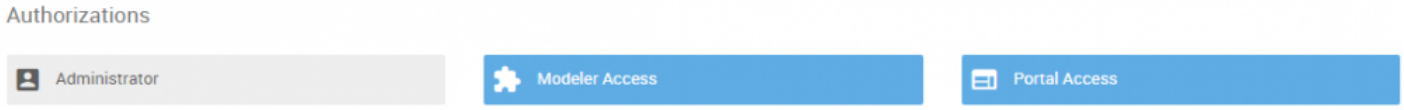
This section displays which authorizations have been granted to you as a user. Your level of authorization will be set by system administrators and is displayed in this section.

There are 3 basic levels of access provided by the EPC:

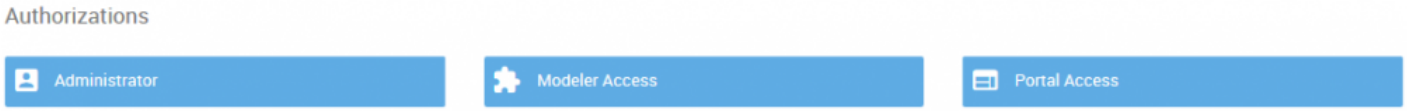
Item	Details
1. Modeler Access	You have access to the EPC Modeler
2. Web App Access	You have access to the EPC Web App
3. Administrator	You have Administrative rights on the EPC Web App and the EPC Modeler

Access is reflected by the color in which the boxes are highlighted. If a section is highlighted in BLUE, it represents access has been granted, and GREY representing access restricted. Please see the examples below for further details.

Example 1: This user has access to the EPC Web App and the EPC Modeler but is not an administrator.



Example 2: This user has access to the EPC Web App and the EPC Modeler, and is an Administrator.



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9.0 Environment Admin

The EPC provides various levels of users with different responsibilities within the system. Providing these various levels of responsibility allows organizations to effectively monitor, manage and oversee system activity independently.

An environment is a technological container, created by the system, to organize process management data on the database. Similar to a physical storage container, modelers and administrators can use environments to store different pieces of information in different environments for different purposes.

The EPC provides 3 kinds of users that have different levels of responsibility. These users are as follows:

1. End Users
2. Environment Admins
3. System Admins

Environment Admins are responsible for **overseeing environment setting** and **selecting environment defaults**. Environment Admins have the ability to set the default templates for users Home pages (widgets) and within Graphs.

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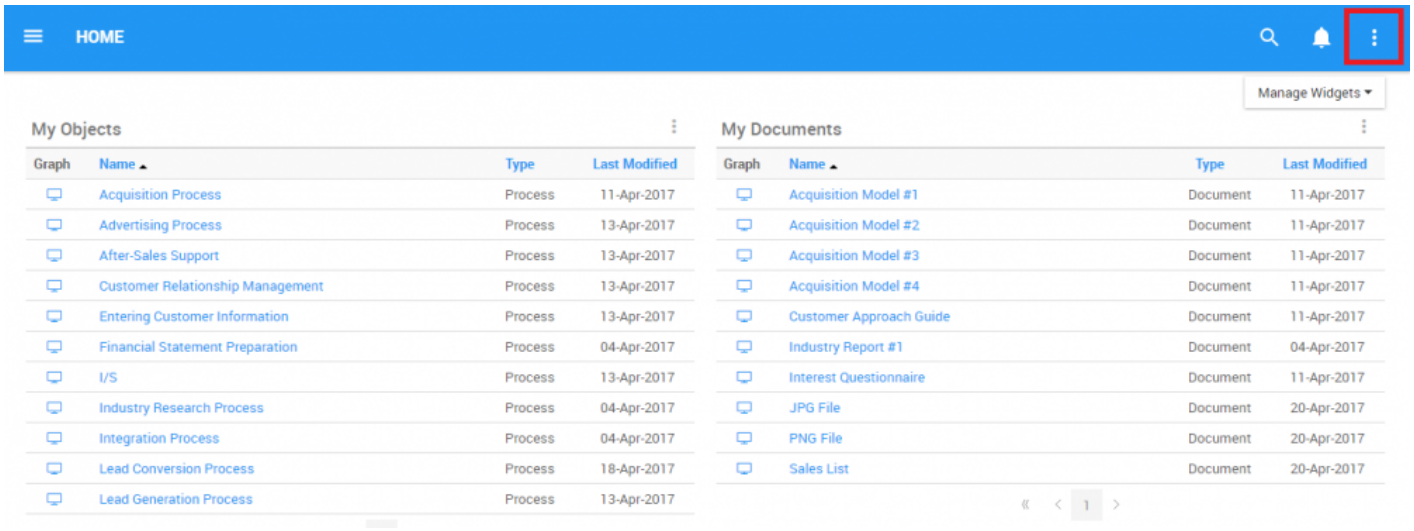
9.1 Environment Settings

Environment Admins are provided with an Environment Admin section where they can edit environment settings. Environment and System Administrators have access to this section in the EPC Web App. From this section, Environment Admins have access to General, Search and Language settings.

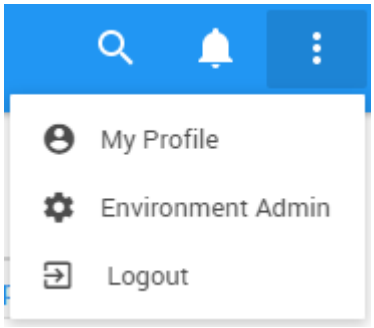
To Navigate to the Environment Admin page, please see the steps below:

1. Login to the EPC

2. On the Home page, navigate your cursor to the icon



3. Select the icon and it will generate a drop-down menu



4. Select the Environment Admin option and you will be navigated to the “General” section

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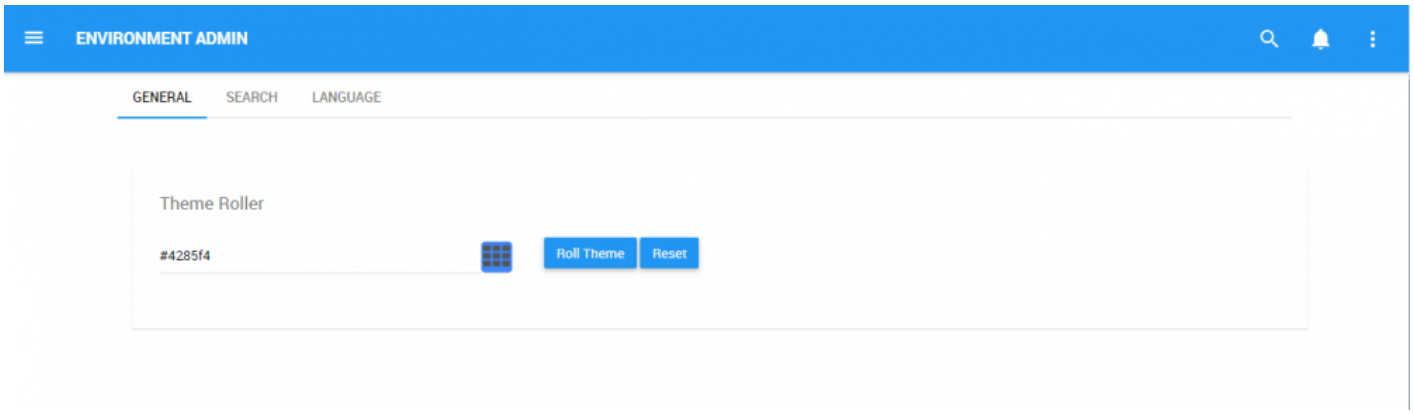

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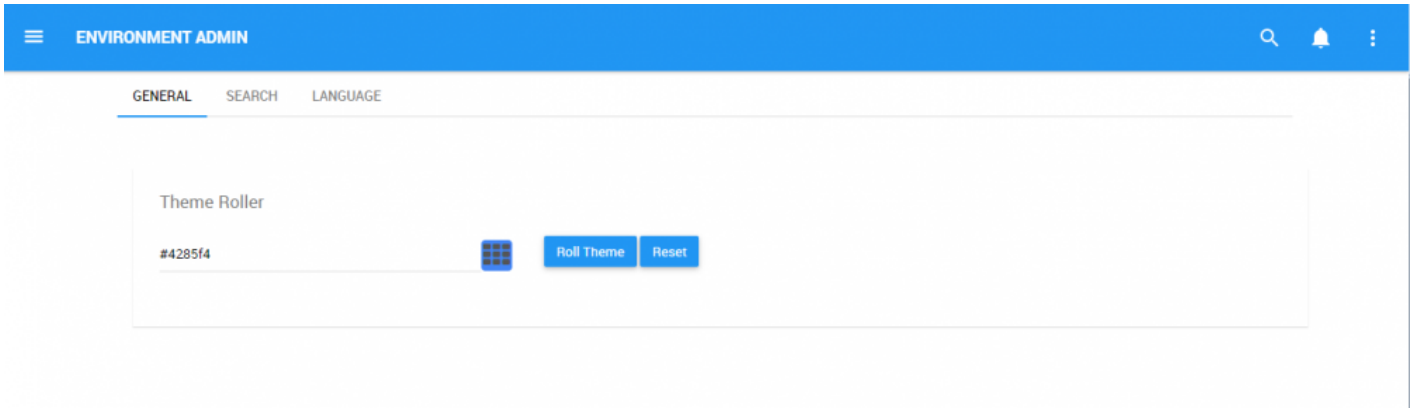
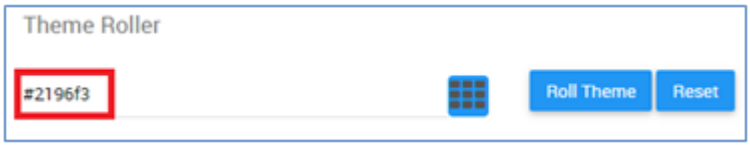
9.1.1 General

The General environment settings page allows Environment Admins to set the Color Theme for the entire environment.



The theme roller allows users to edit the color that their EPC Web App displays. The specific color being displayed is a Hex code in the text box.



Please see the following instructions to change the color of your EPC Web App

1. Navigate to the “Environment Admin” section of the EPC

2. Select the icon

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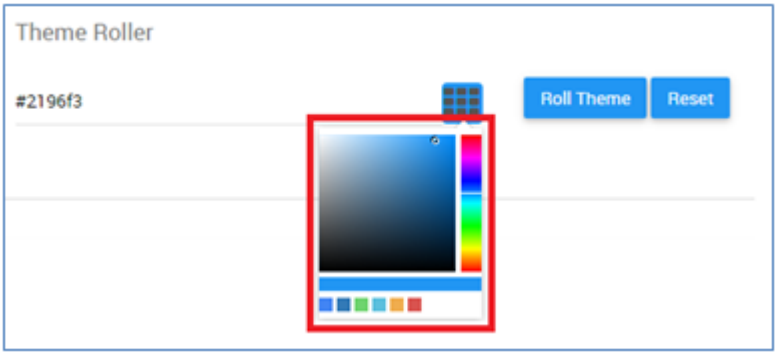
3. It will generate a drop-down menu featuring a color select window



4. Users can select between the color bar a), shade b) and from c) recent colors by clicking on their desired selection

a)

b)

c)

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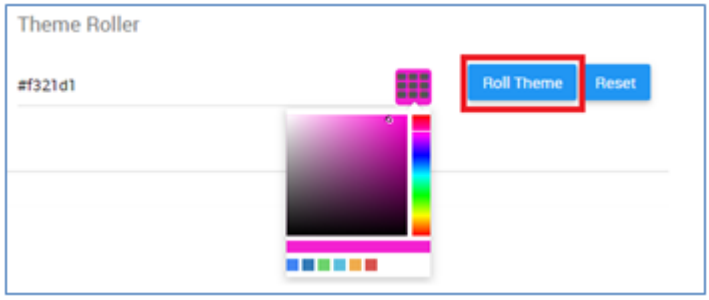
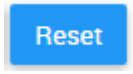
5. Select to color you desire. It will enter a new alphanumeric code in the text box.

6. Select the “Roll Theme” button to apply the theme



7. The page will be reloaded and the new theme will be applied

To revert back to a former or default color, you can:

i. Select the “Reset” button 

ii. Select the desired color from the “Recent Color” bar

iii. Enter in the default alphanumeric code – **#2196f3**

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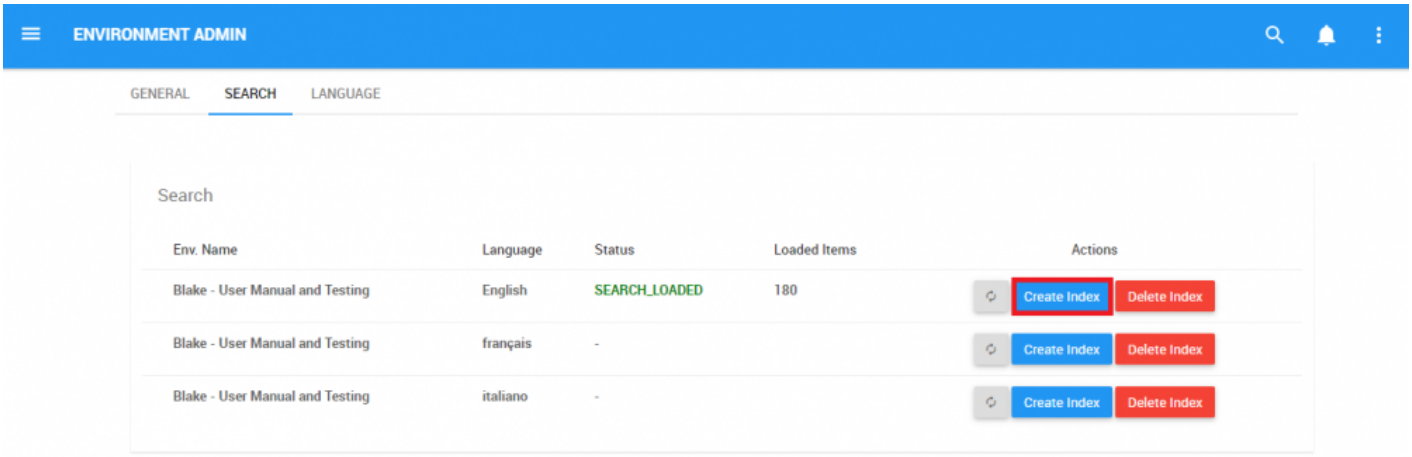
9.1.2 Search Index

The Search section of the Environment Admin Page controls the search indexes within the EPC. The Search function is controlled by Indexes that have been uploaded to the EPC. The Indexes themselves comprise of the different data sets that EPC Modelers have inputted and uploaded into EPC databases.

Uploading these indexes connects the EPC Modeler databases with the EPC Web App Search engine. Once the connection is made by the Admin, users can use the EPC Search Engine.



For the Search function to work effectively, Environment and System Admins must populate the indexes within the EPC. The indexes, once uploaded, allow users to search through them with the Search function. Search Indexes must be both created and subsequently refreshed to be used most effectively.

To Create Search Indexes, please see the steps below:

1. Navigate to Environment Admin page

2. Navigate to Search Tab

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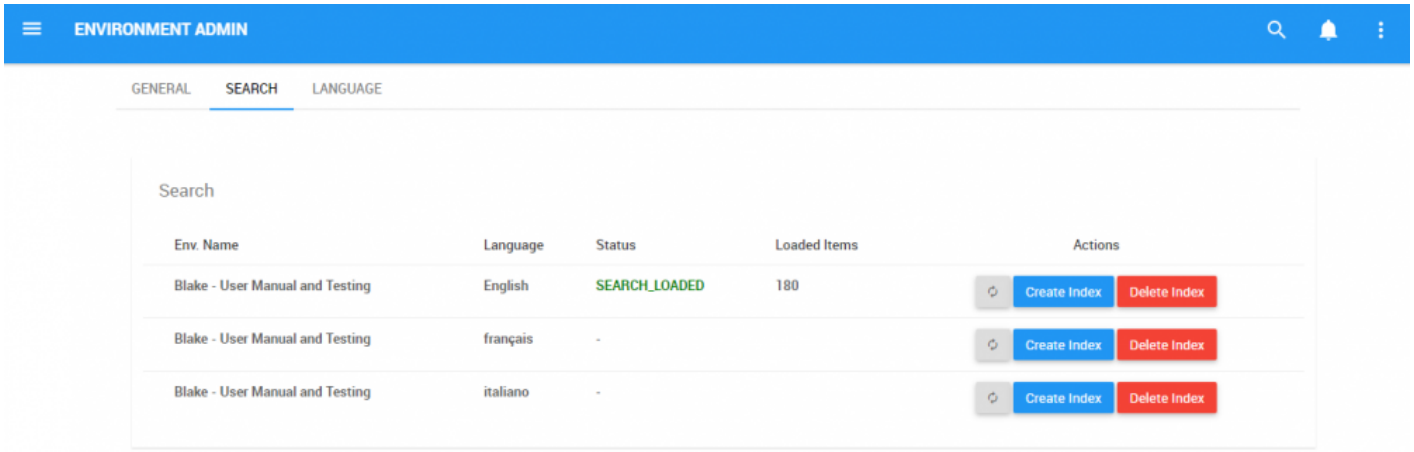
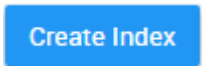
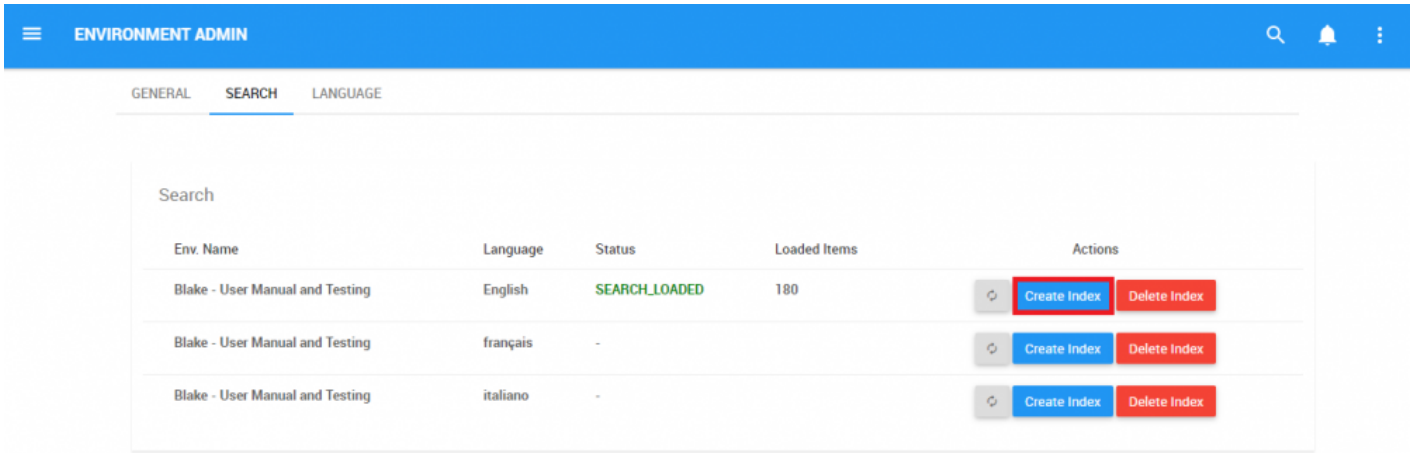
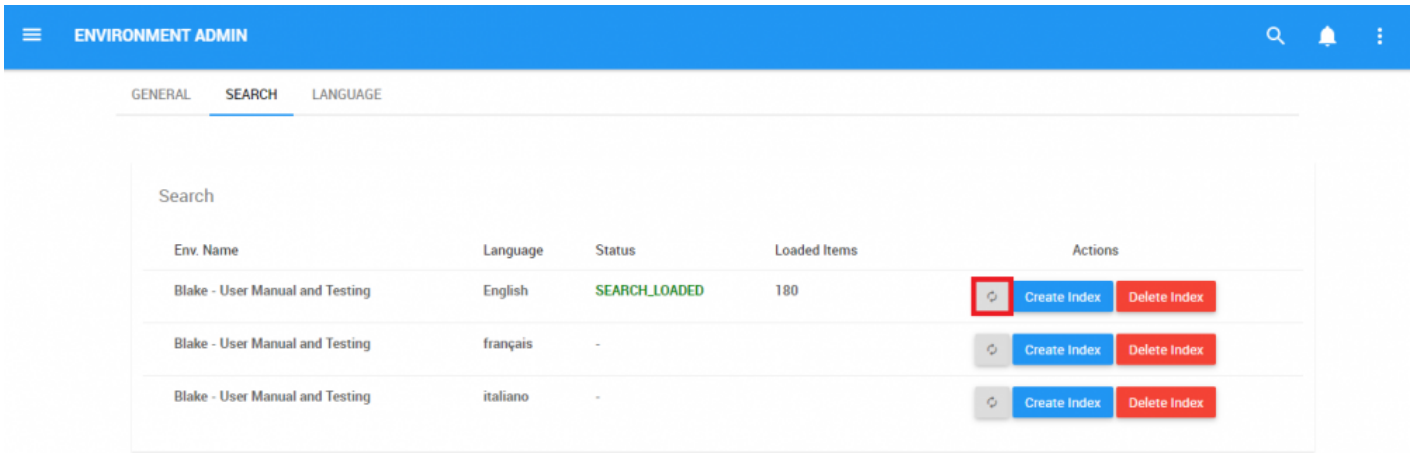
3. You will be navigated to the Search page



4. To create the Index, select the  icon



5. After the index has been created, select the refresh icon



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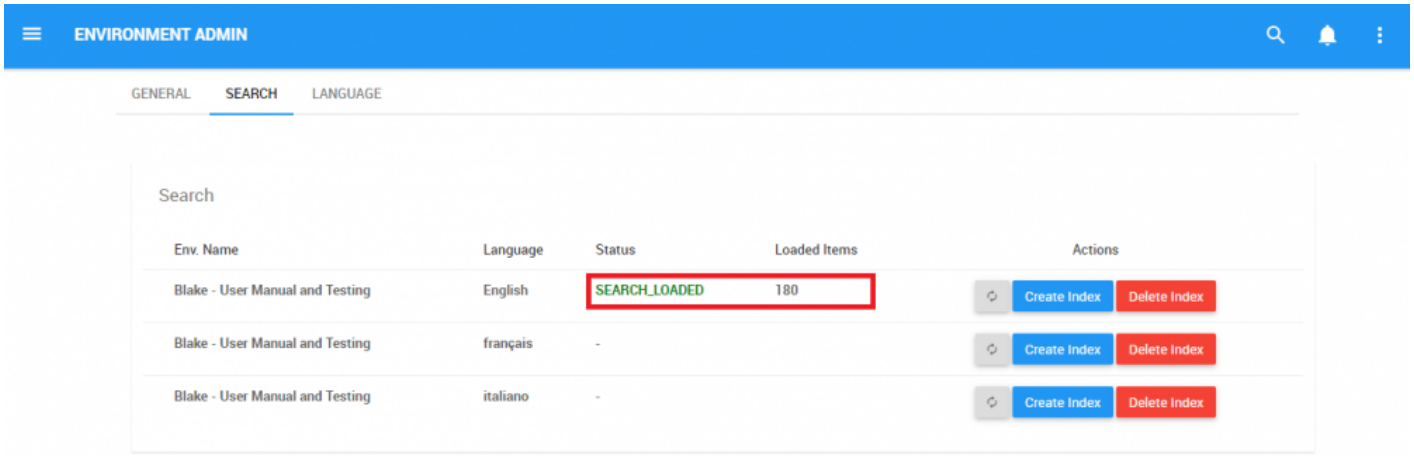
6. Once the refresh, the status of the upload will be reflected within the “Status” and “Loaded Items” column



A Search Index must be loaded for the Search bar to function. Without uploading and Index, users will not be able to use the search function.

Loading an Index can be time consuming depending on Index size. It is recommended that Admins create of refresh indexes when traffic on the Web App is at a minimum (e.g. overnight).

In order for the search engine to work efficiently and effectively, a maximum file size of 20 MBs has been set. This meaning that files exceeding 20 MBs will not appear in search results. This max file size can be changed by System Admins.

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9.1.3 Language

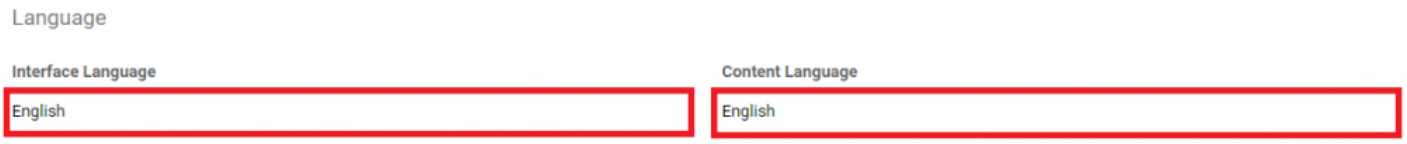
Environment Admins can select the Interface default and Content Language for the environment. The languages selected will be the default languages for end users. End users themselves can further customize their language settings.

To toggle between languages, please see the steps below:

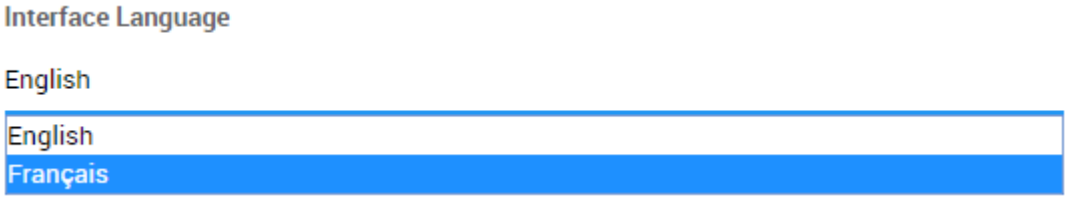
1. Navigate to the “Environment Admin” section of the EPC

2. Navigate to the Language tab

3. Select a Language text box



4. It will generate a drop-down menu featuring all the languages that you have been given access to.



5. Select the language you wish to display. The page will be refreshed and you will now be navigating the selected language.

> Switching Content Language requires EPC’s Multilingual License.

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9.2 Environment Defaults

Environment Admins have control over default settings for their specific environment. Setting defaults allows Environment Admins to create templates for the users to optimize their use of the EPC.

There are 2 main areas that Environment Admins can set defaults for:

1. **Home Page**: This allows an Environment Admin to set the default Widgets that will appear on users' home screens.

2. **Graphs**: This allows an Environment Admin to set the default Map Graph Options for Processes (Graph Type, Icons & Annotation, Performance Color, etc.)

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9.2.1 Home Page (Widgets)

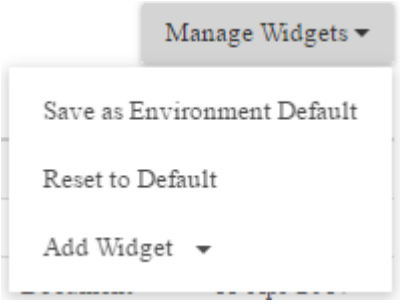
Environment Admins can select the default Widget layout for environment users. Selecting the default layout will allow environment admins to control the initial settings of users Home pages, as well as provide the template should users reset their home page.

To Set a Home Page Widget Layout as a default layout, please see the steps below:

1. Log into the EPC

2. Navigate to and select the Manage Widgets icon

3. This will generate a drop down menu



4. Select Save as Environment Default and your current Widget Layout will be saved at the Environment's default layout

> The Default Widget Layout set will be the current Widget Layout that the Environment Admin has displayed.

> Further details on Home Page and Widget customization.

9.2.2 Graphs (Process Map Graphs)

Environment Admins have the ability to set the Process Map Graph default layouts. Selecting the default layout will allow environment admins to control the initial setting of Process Map Graph viewers. Setting the optimal Process Map Graph layout settings will provide users with optimized Graph viewing capabilities, easing viewing, analysis and ability to understand the graphs. End users can further customize Process Map Graphs based on their own need.

To Set Process Map Graph default settings, please see the steps below:

1. Login to the EPC

2. Select a Process within the Process Module

3. Navigate to the Process's Map Graph

4. Select the "Options" icon

5. Select the desired settings that you would like to have set at the Graph's default settings

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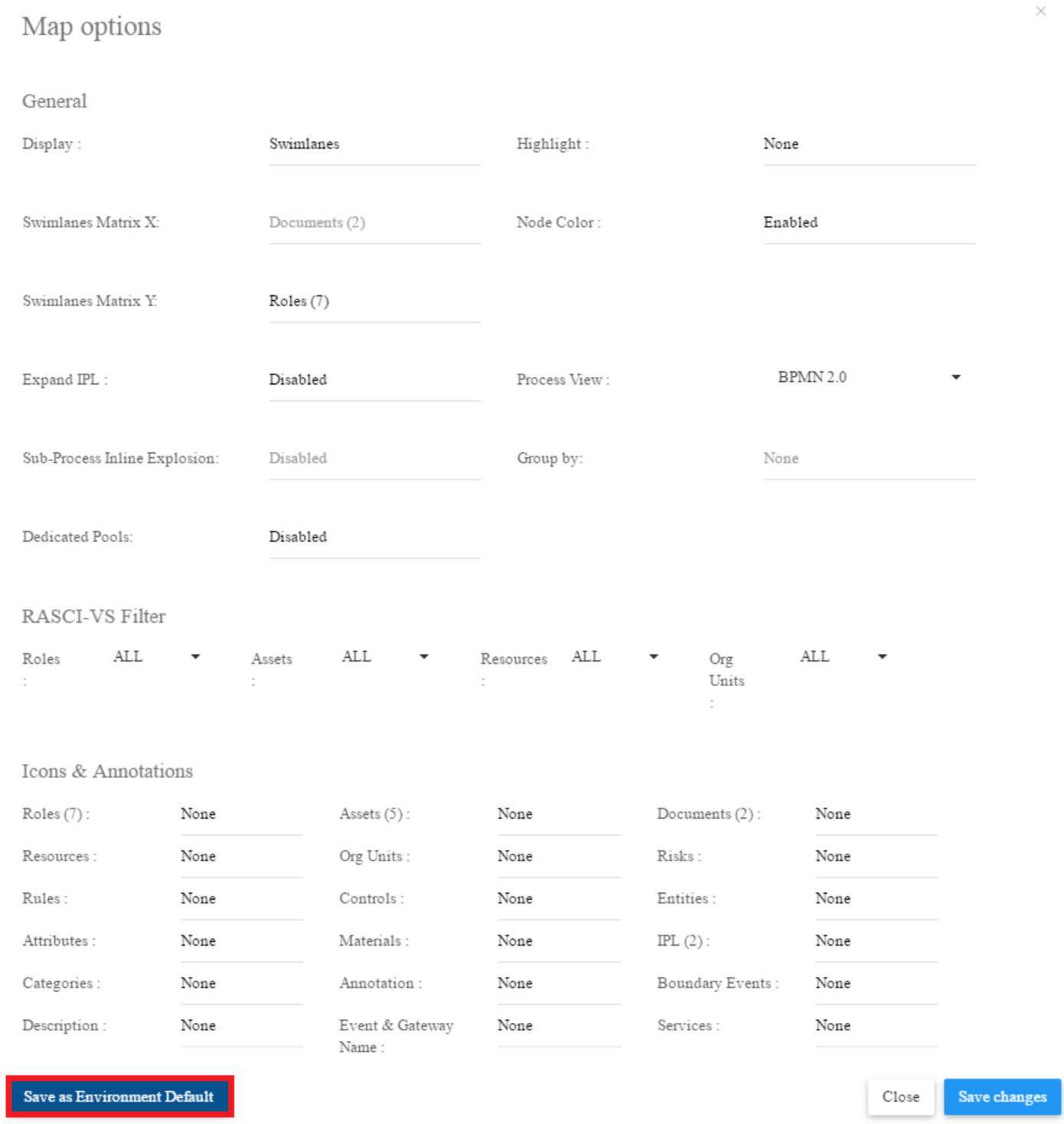
6. Select the Save as Environment Default icon and the settings will be saved



10.0 System Admin

System Administrators are the users with the highest level of autonomy and responsibility. They are responsible for overseeing and maintaining the EPC for all system users.

To assure that System Administrators can oversee and maintain the EPC effectively, they are provided with a variety of responsibilities which can be classified as follows:

1. System Settings

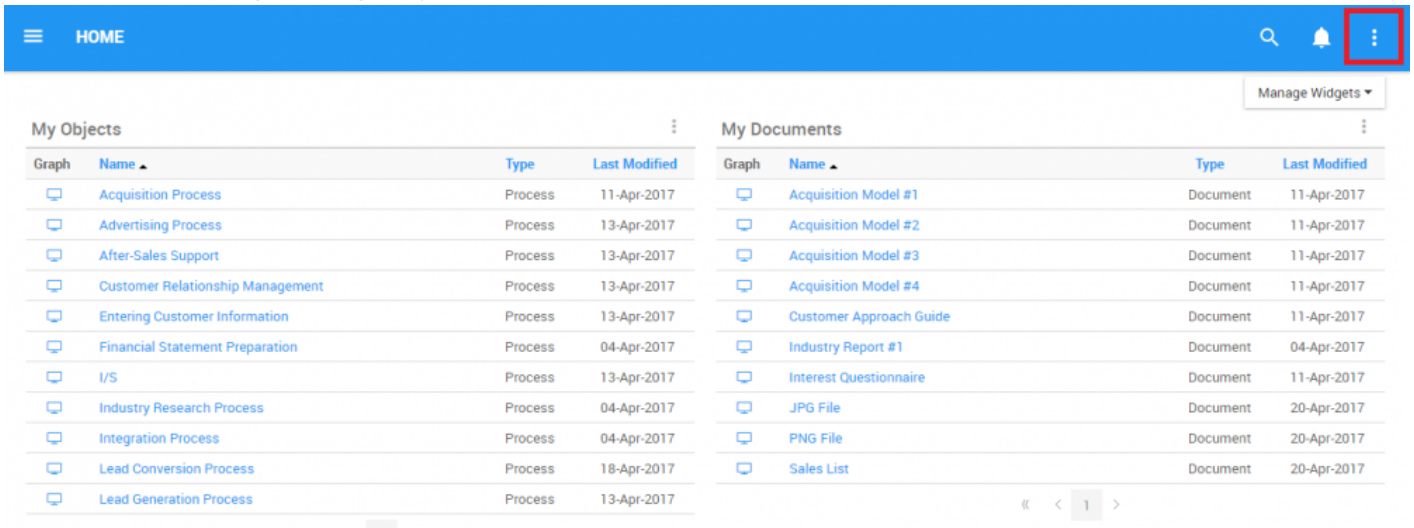
- General
- Users
- Groups
- Search
- System Setting
- Language

2. System Defaults

To Navigate to the System Administrator section, please see the steps below:

1. Login to the EPC

2. On the Home page, navigate your cursor to the icon



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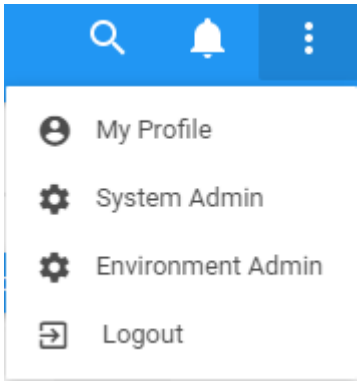
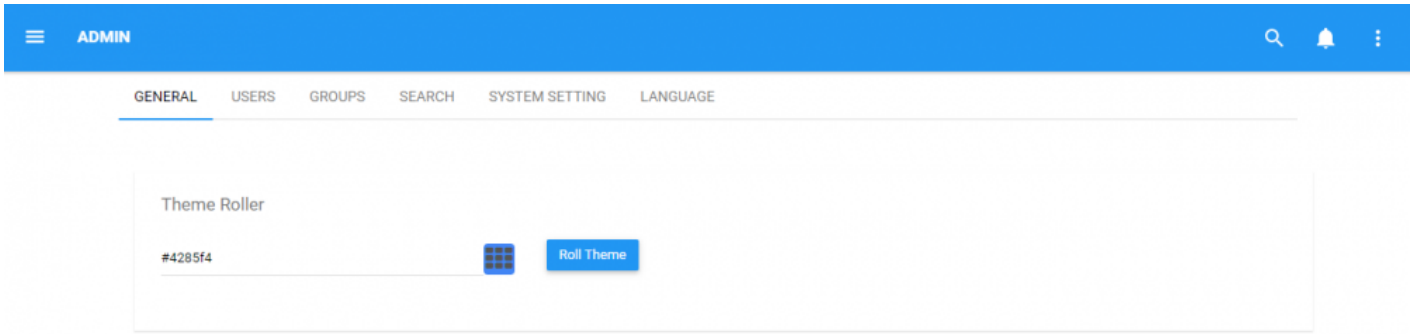
3. Select the icon and it will generate a drop-down menu



4. Select System Admin option and you will be navigated to the “General” section



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10.1 System Settings

System Administrators can set system settings that will affect all users and environment within the EPC.

The various settings that System Administrators have access to are as follows:

1. General
2. Users
3. Groups
4. Search
5. System Setting
6. Language

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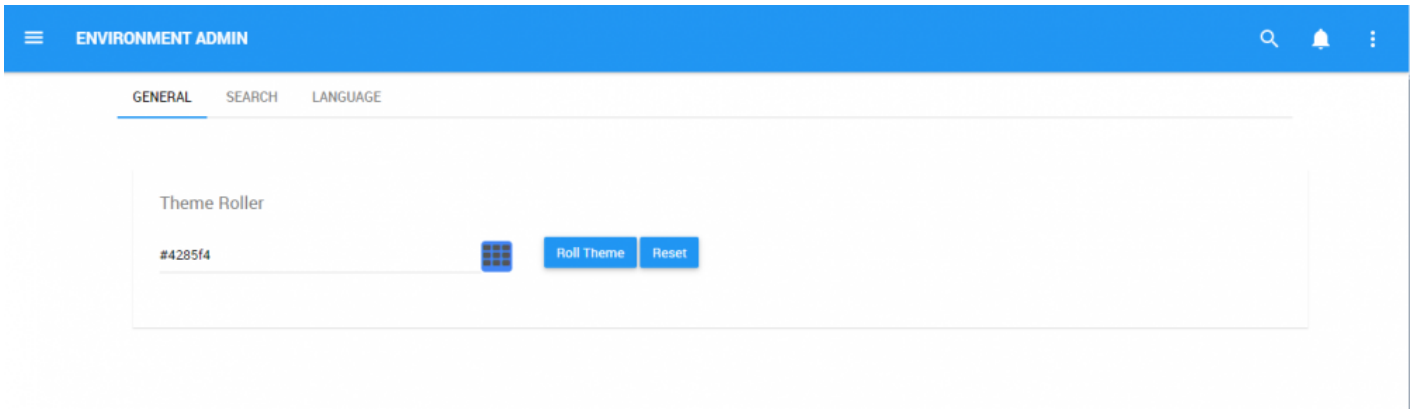
10.1.1 General

The General system settings page allows System Admins to set the Color Theme for the entire system.



The theme roller allows users to edit the color that their EPC Web App displays. The specific color being displayed is represented by an alphanumeric code in the text box.

Please see the following instructions to change the color of your EPC Web App

1. Navigate to the “System Admin” section of the EPC

2. Select the icon

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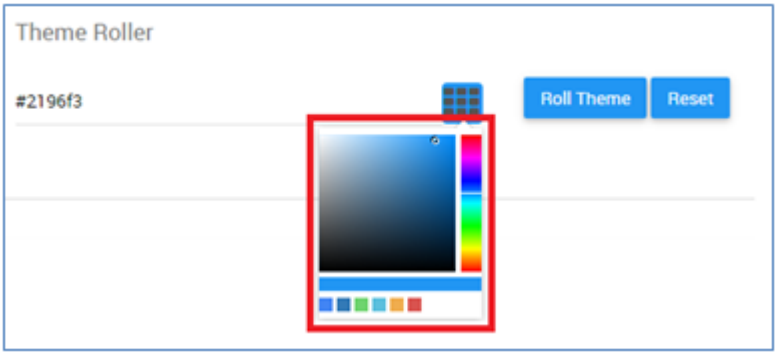
3. It will generate a drop-down menu featuring a color select window



4. Users can select between the color bar a), shade b) and from c) preset colors by clicking on their desired selection

a)

b)

c)

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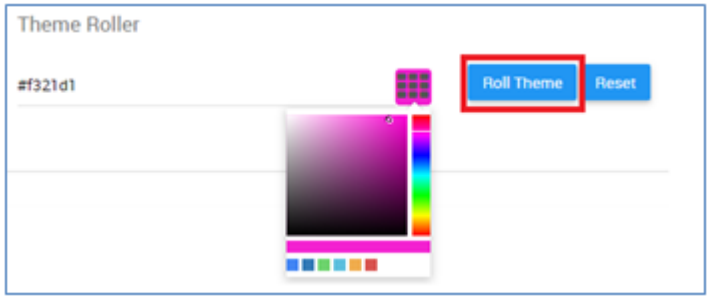
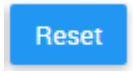
5. Select to color you desire. It will enter a new alphanumeric code in the text box.

6. Select the “Roll Theme” button to apply the theme



7. The page will be reloaded and the new theme will be applied

To revert back to a present or default color, you can:

i. Select the “Reset” button 

ii. Select the desired color from the “Recent Color” bar

iii. Enter in the default Hex code – **#2196f3**

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10.1.2 Users

System Administrators will be responsible for creating and managing users and user profiles within the EPC. Within the Users tab of the System Admin section, Administrators can do the following:

1. Add Users
2. Edit Existing Users
3. Delete Users
4. Manage User Groups
5. Search for Users

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10.1.2.1 Adding Users

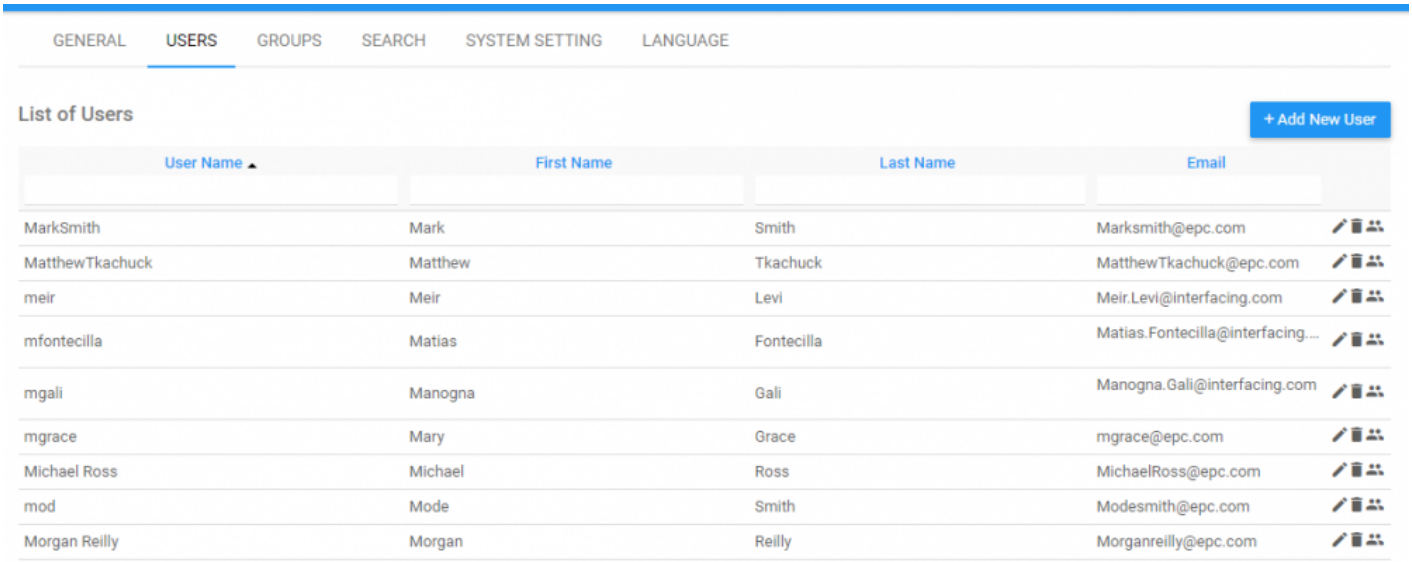
Adding users will create user profiles and individuals can use to access the EPC. System Administrators are responsible for creating the user profile, populating the profile with the necessary information, and awarding access to the user profile.

To add a user profile, please see the steps below:

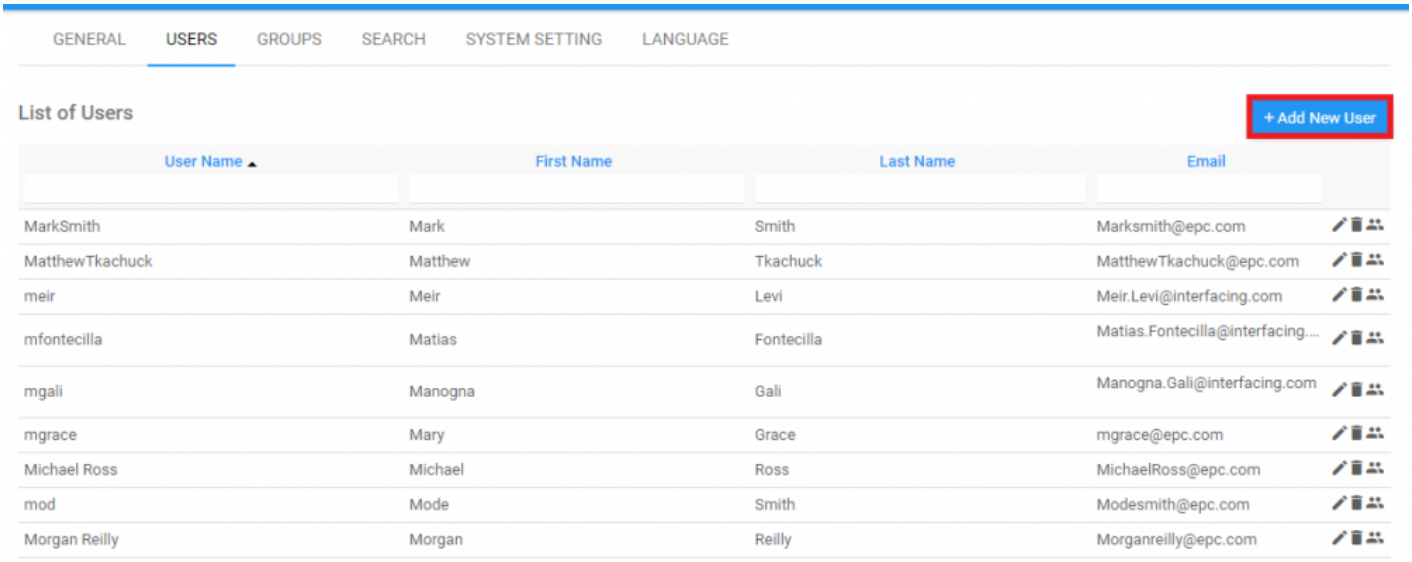
1. Login to the EPC

2. Navigate to the System Admin Section

3. Select the Users tab within the System Admin Section. You will be navigated to the User management page.



4. To add a user, select the + Add New User button



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5. This will create a pop-up window allowing System Admins to fill in the appropriate information

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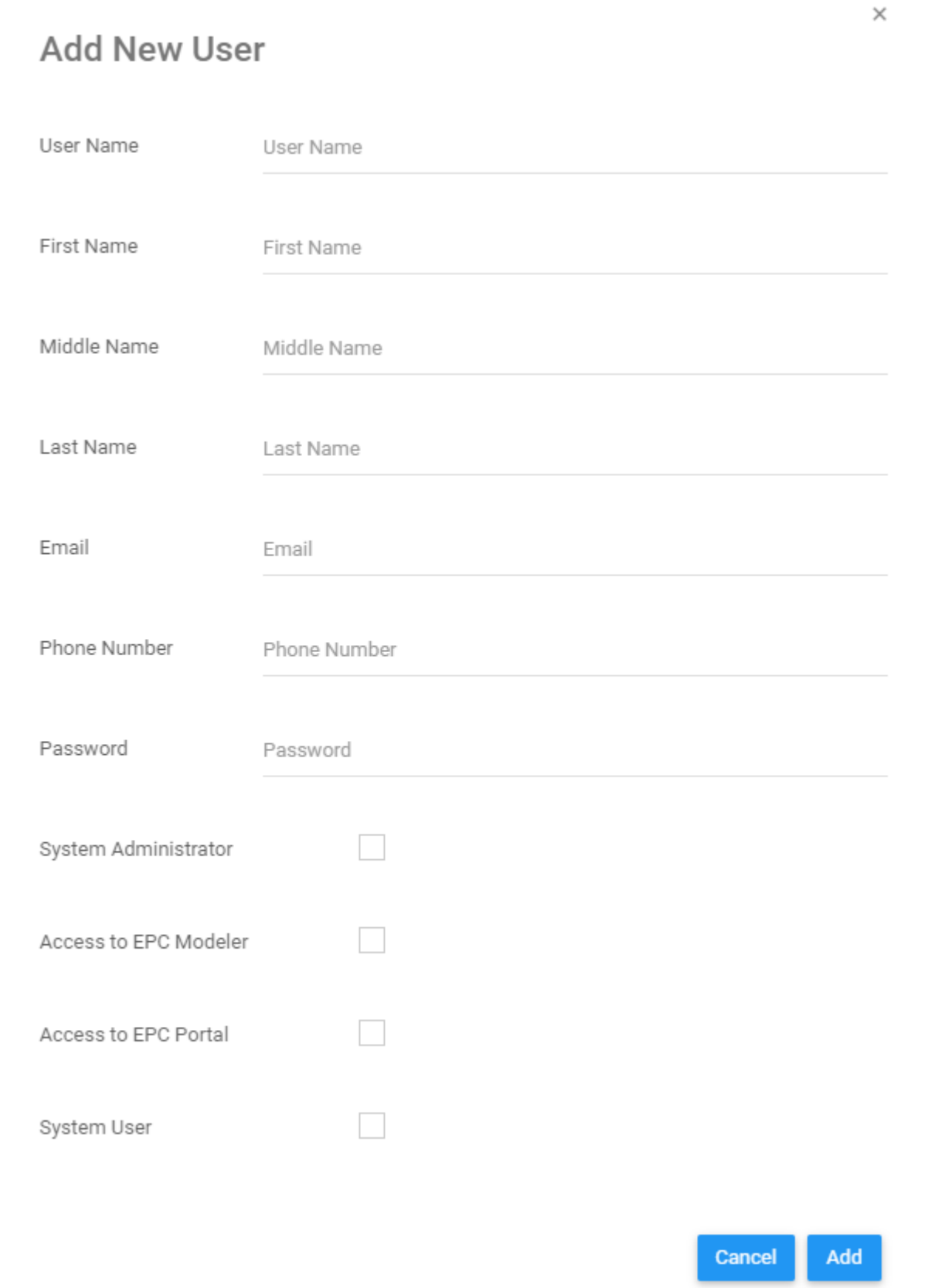
Add New User
User Name
User Name
First Name
First Name
Middle Name
Middle Name
Last Name
Last Name
Email
Email
Phone Number
Phone Number
Password
Password
System Administrator
Access to EPC Modeler
Access to EPC Portal
System User
Cancel
Add

6. Populate the profile with the appropriate information and then select the

button and the user will be added to the EPC.

NOTE 1: Username, Email and Phone number must be unique within the system.

NOTE 2: The EPC can import users from existing active directories. For further detail, please refer to the installation manual.

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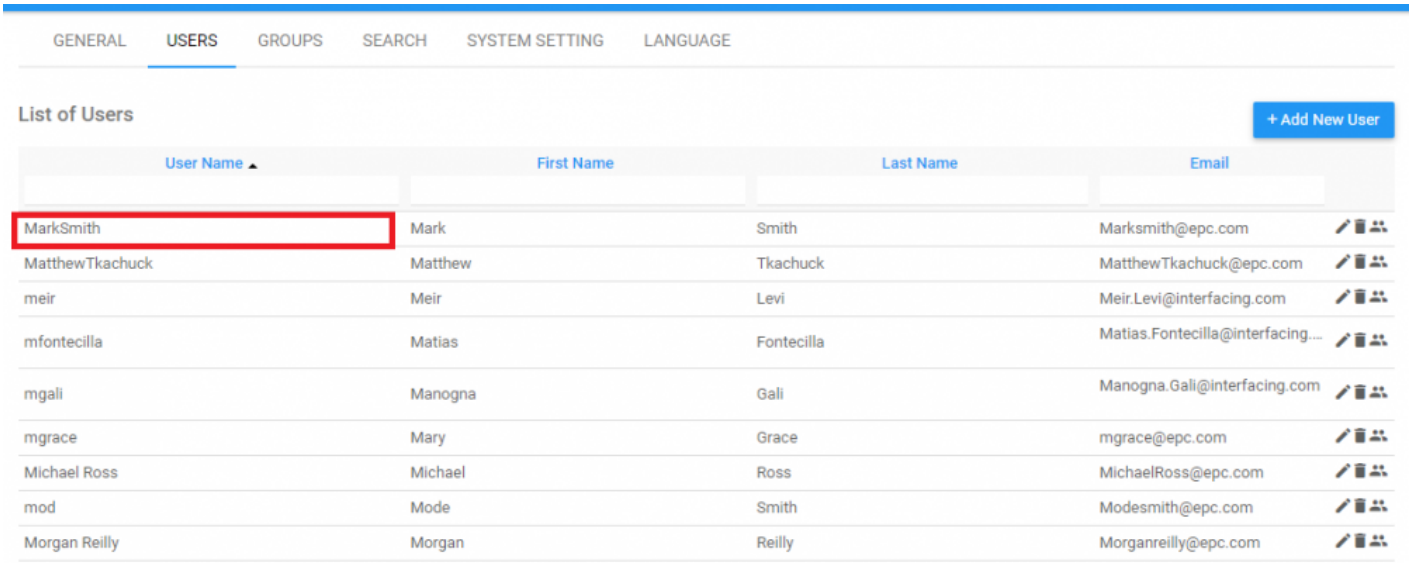
10.1.2.2 Edit Existing Users

When needed, administrators can edit user information. System Admins can perform in-line edits for information displayed in the user list, or can navigate to the edit section for further editing capabilities.

In-Line Editing

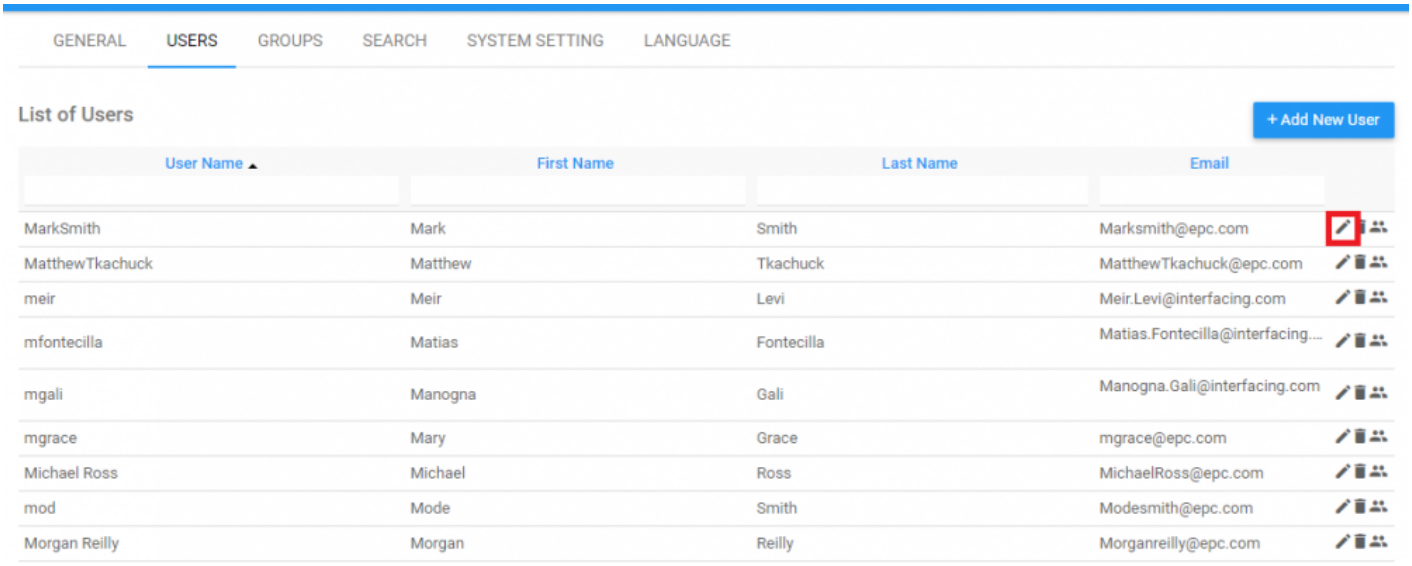
In line edits can be performed by selecting item (User Name, First Name, Last Name or Email) directly within the user list. Simply click on the desired section (below has User Name selected) and type in the desired edit for the user profile.



Editing Window

For further editing capabilities, System Admins can select the icon featured on the right hand-side of

each user.



NOTE: If an organization is using any format of SSO login, editing users will be disabled within the EPC Web App. This is due to the fact that user accounts are paired with other authentication methods (e.g. Windows Login).

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Selecting this item will re-open the full user editing page. System Administrators can subsequently enter in the required information.

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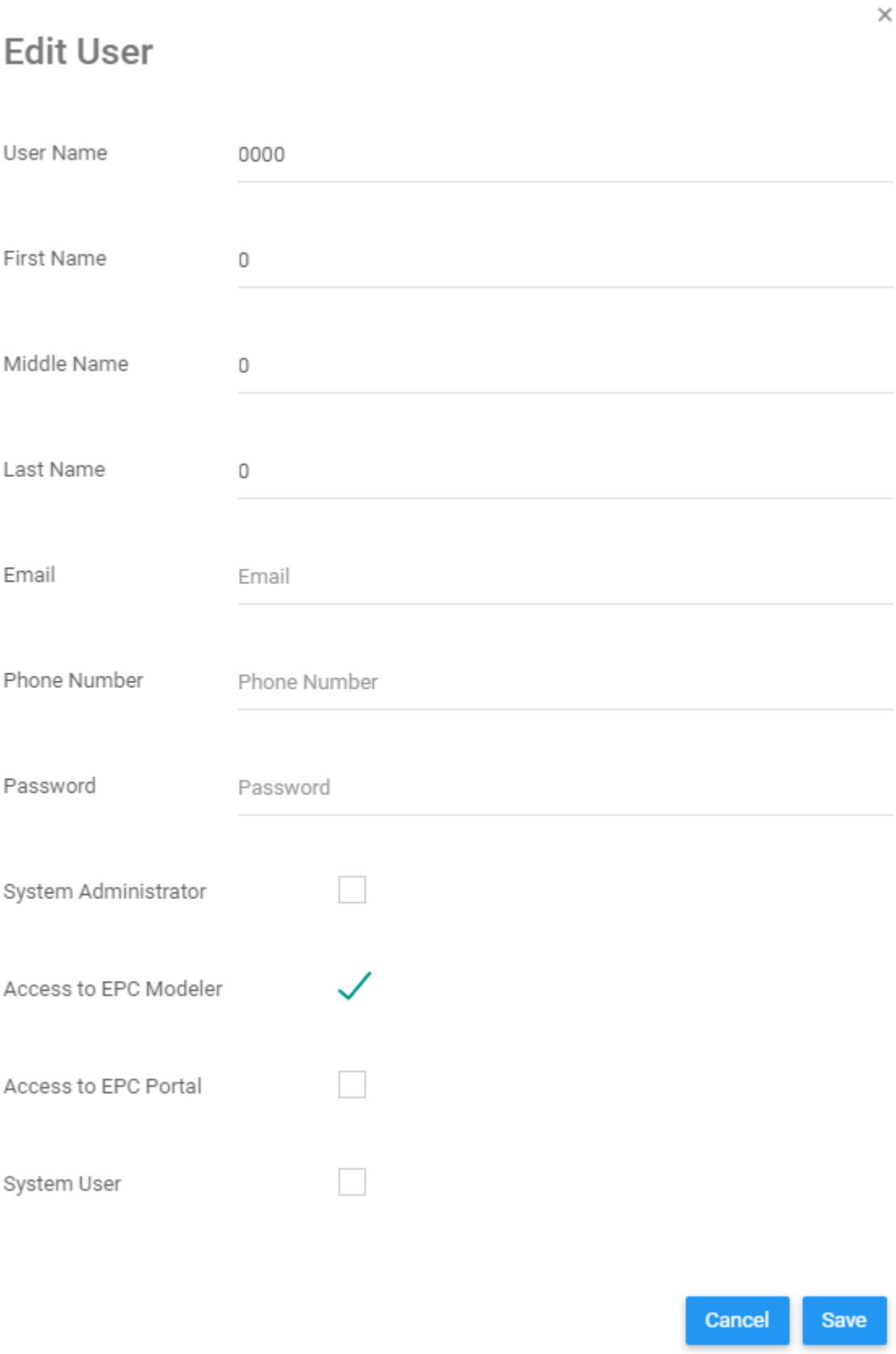
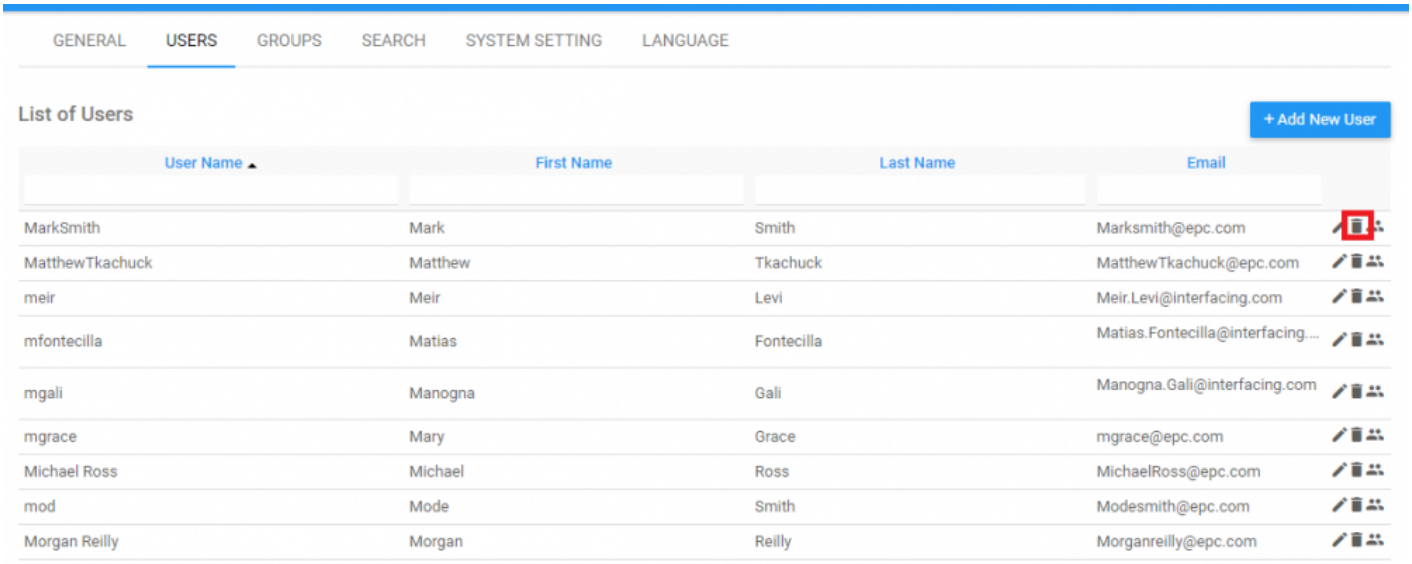

Edit User
User Name
0000
First Name
0
Middle Name
0
Last Name
0
Email
Email
Phone Number
Phone Number
Password
Password
System Administrator
Access to EPC Modeler
Access to EPC Portal
System User
Cancel
Save

10.1.2.3 Delete Users

System Administrators can delete unnecessary users by selecting the icon on the right hand side of the user list.



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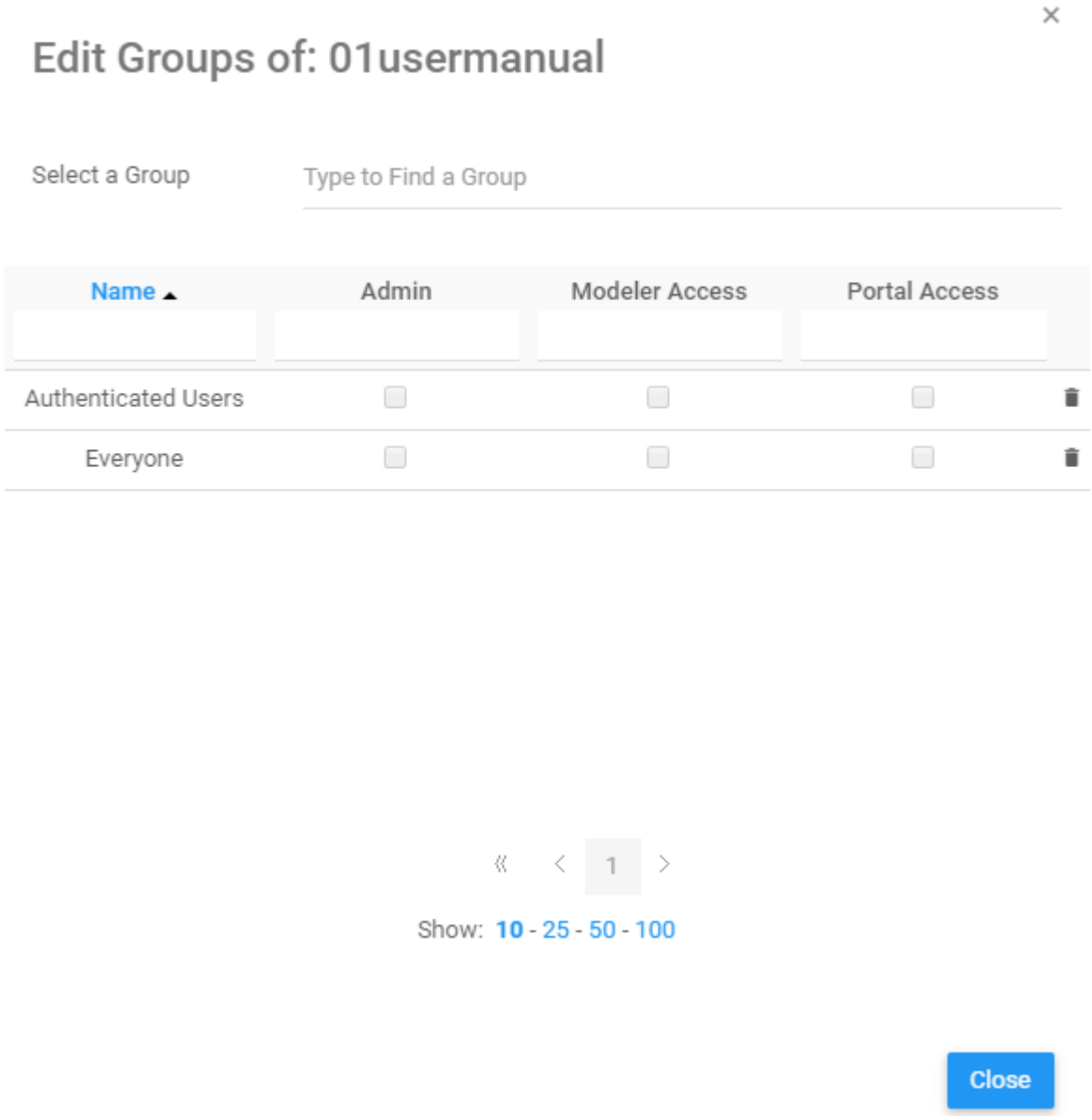
10.1.2.4 Manage User Groups

User groups are classifications created by Administrators or Modelers to provide variable access and ownership. Users can be assigned to one or multiple groups depending on the user needs. System Admins can view these groups within the Groups tab, or can view which groups users are part of directly within the Users tab by selecting the icon.

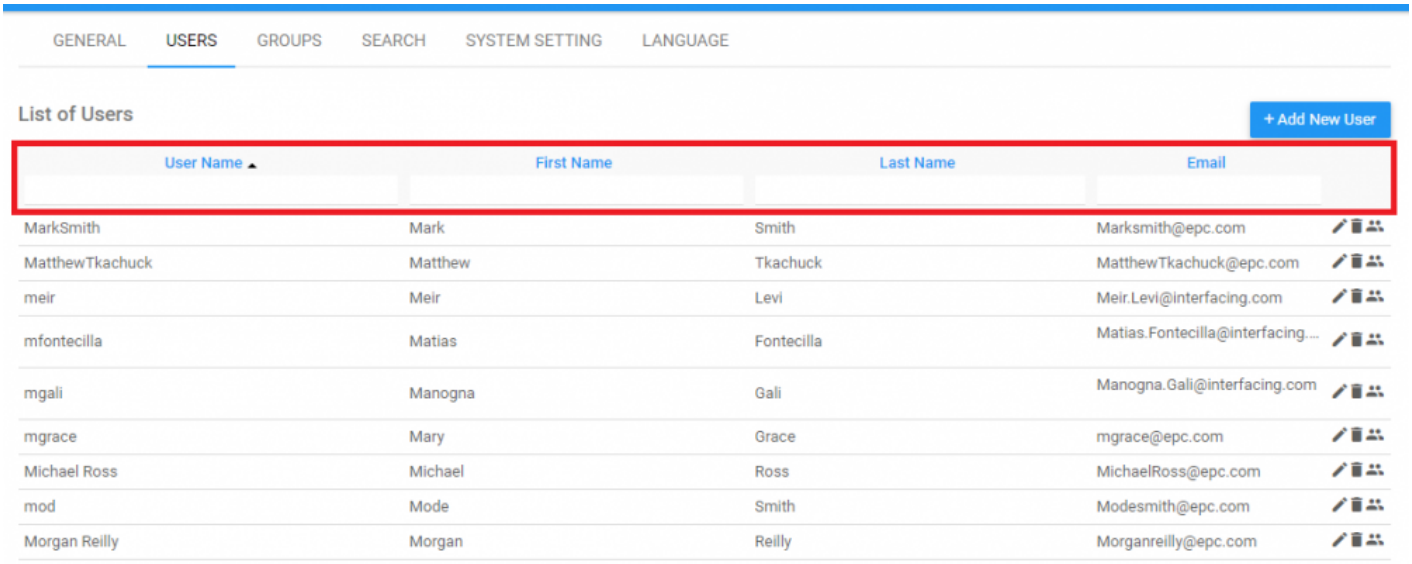
Clicking on this icon will generate a window featuring all Groups that the select user is part of.



10.1.2.5 Search for Users

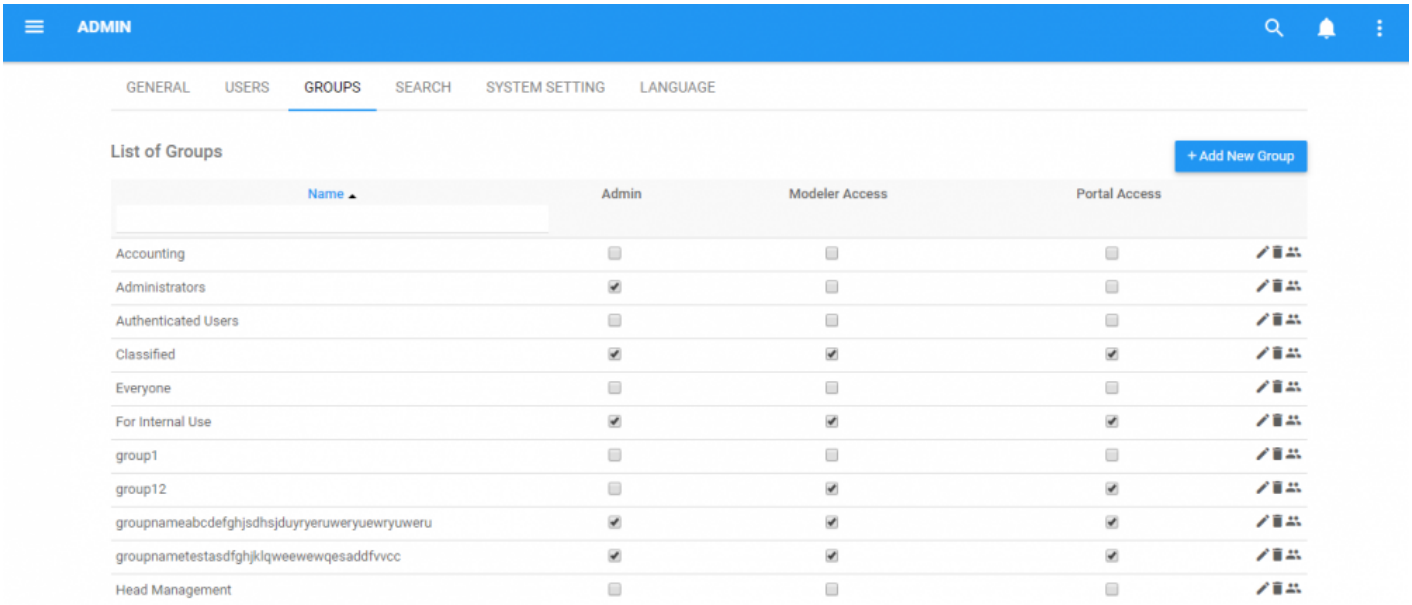
In order to facilitate navigation, EPC 10 allows System Admins to search for users based on select criteria. Admins can filter and search for users based on their User Name, First Name, Last Name and Email.

These search criteria can be found at the top of the page.



10.1.3 Groups

System Administrators can manage groups within the Group's tab. System Administrators can create and manage groups to assist in user classification and management, as well as control access for different user groups. This allows System Admins to efficiently control and manage different user groups in a consolidated space.



To create a group, please see the steps below:

1. Login to the EPC Web App

2. Navigate to the System Admin section

3. Navigate to the Groups tab

4. Select the + Add New Group icon

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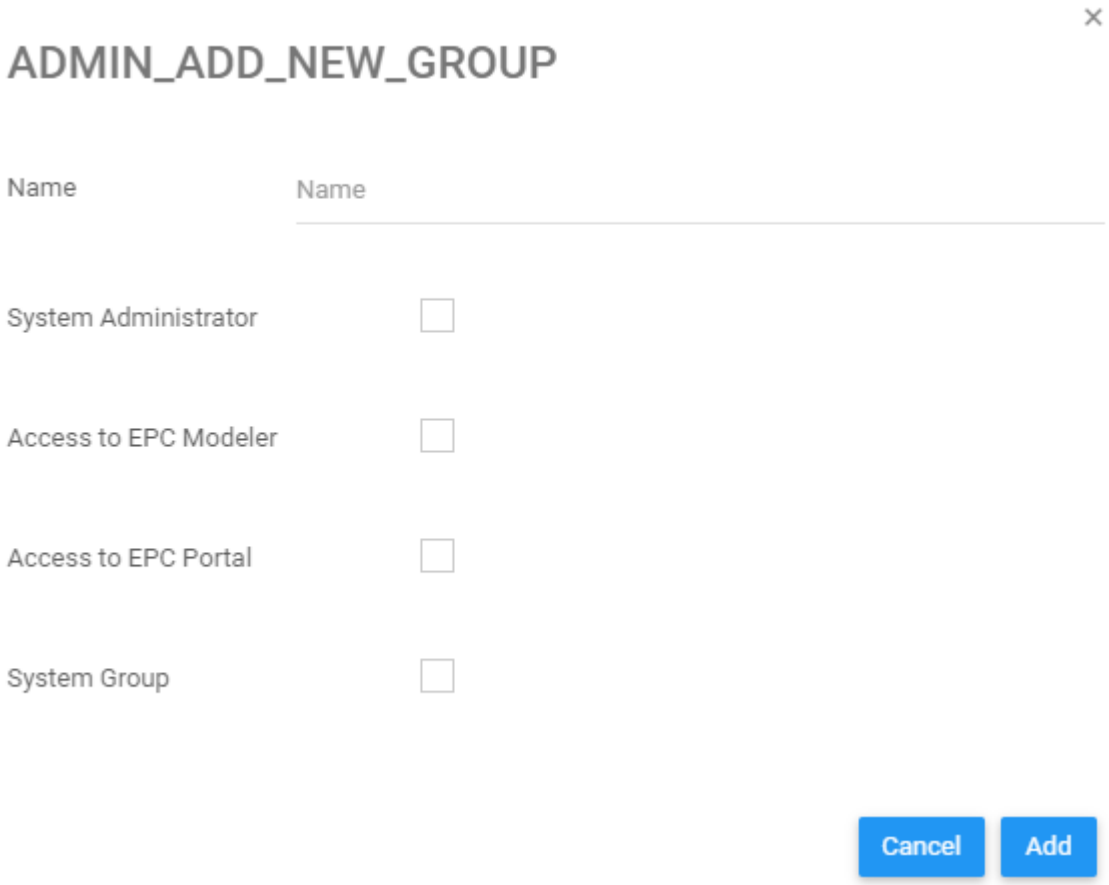
5. A pop-up window will be generated



6. Input the Group Name as well as the access provided to the group.

7. Click the Add button and the group will be created.

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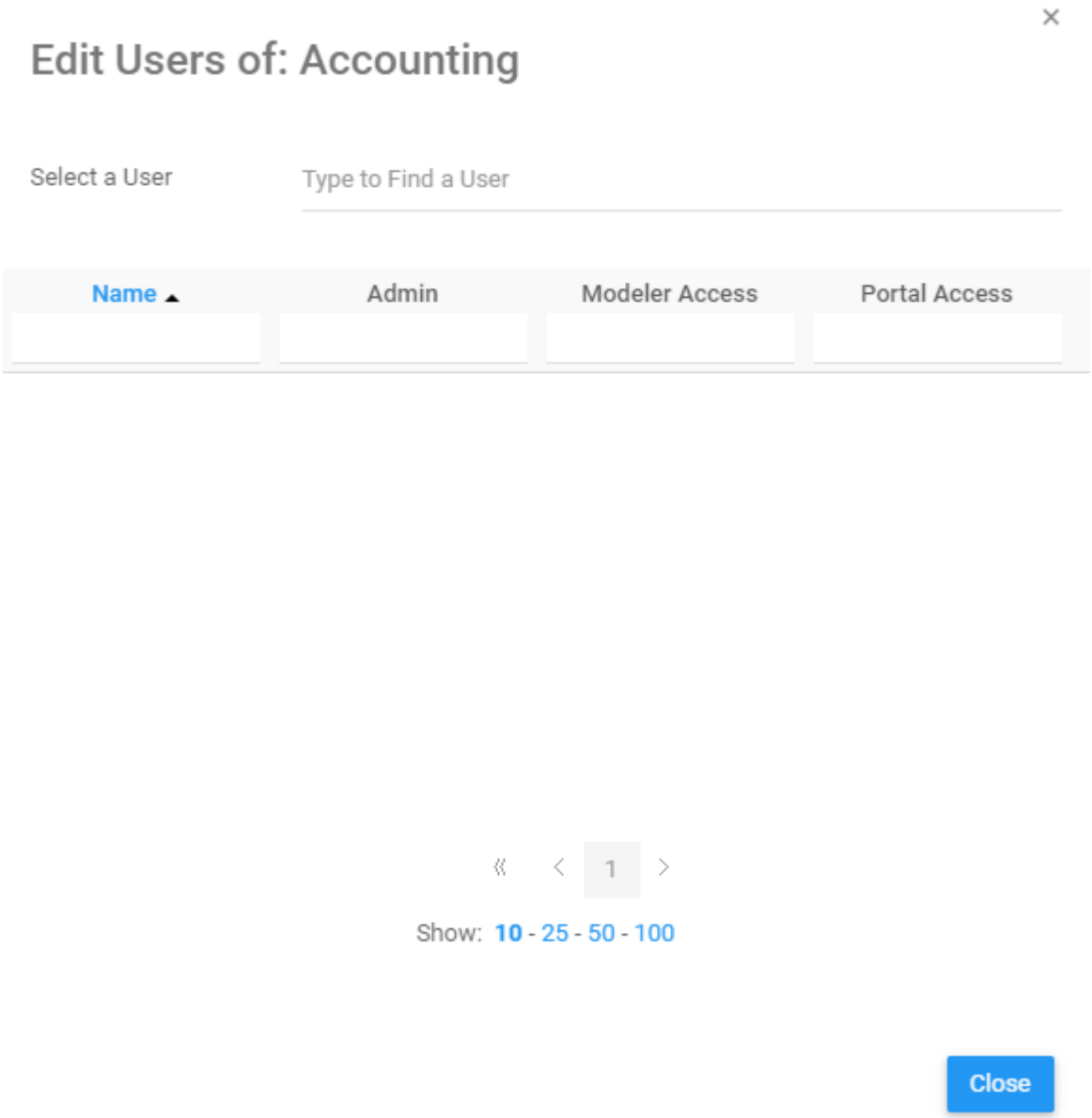
8. To populate the group, you must select the icon next to the group you have created. Click on the icon and it will generate a pop-up window



9. Search and select the users you would like to add to the group.

10. Once you have populated the group, select the “Close” button.

Users can edit or delete groups directly with the edit icon and delete icon .

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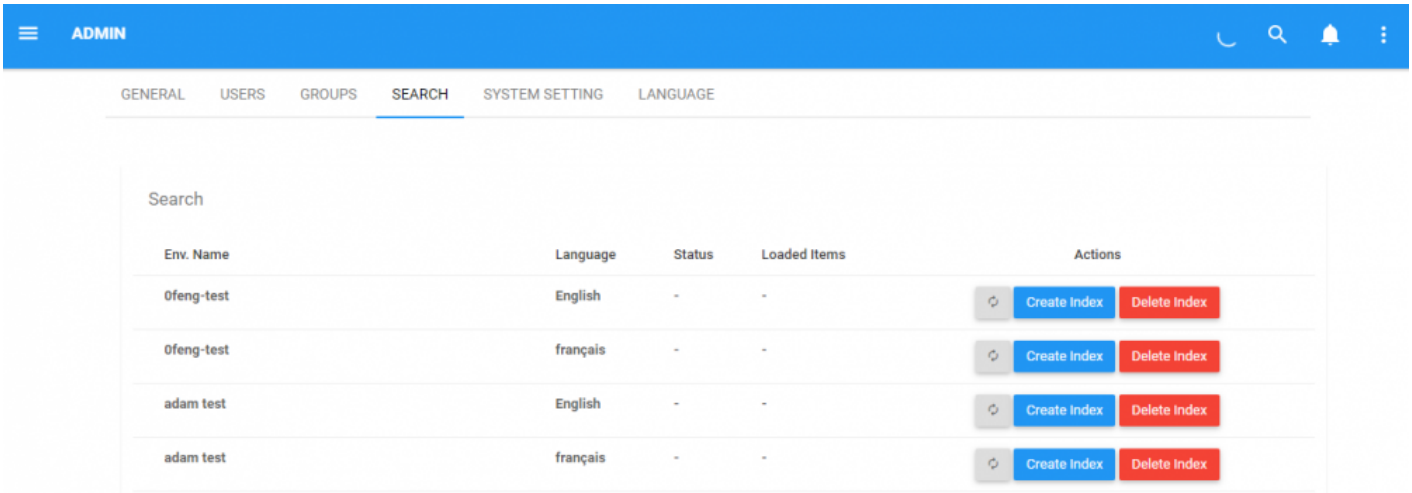
10.1.4 Search Index

The Search section of the System Admin Page controls the search indexes within the EPC. The Search function is controlled by Indexes that have been uploaded to the EPC. The Indexes themselves comprise of the different data sets that EPC Modelers have inputted and uploaded into EPC databases.

Uploading these indexes connects the EPC Modeler databases with the EPC Web App Search engine. Once the connection is made by the Admin, users can use the EPC Search Engine.



For the Search function to work effectively, Environment and System Admins must populate the indexes within the EPC. The indexes, once uploaded, allow users to search through them with the Search function. Search Indexes must be both created and subsequently refreshed to be used most effectively.

To Create Search Indexes, please see the steps below:

1. Navigate to System Admin page

2. Navigate to Search Tab

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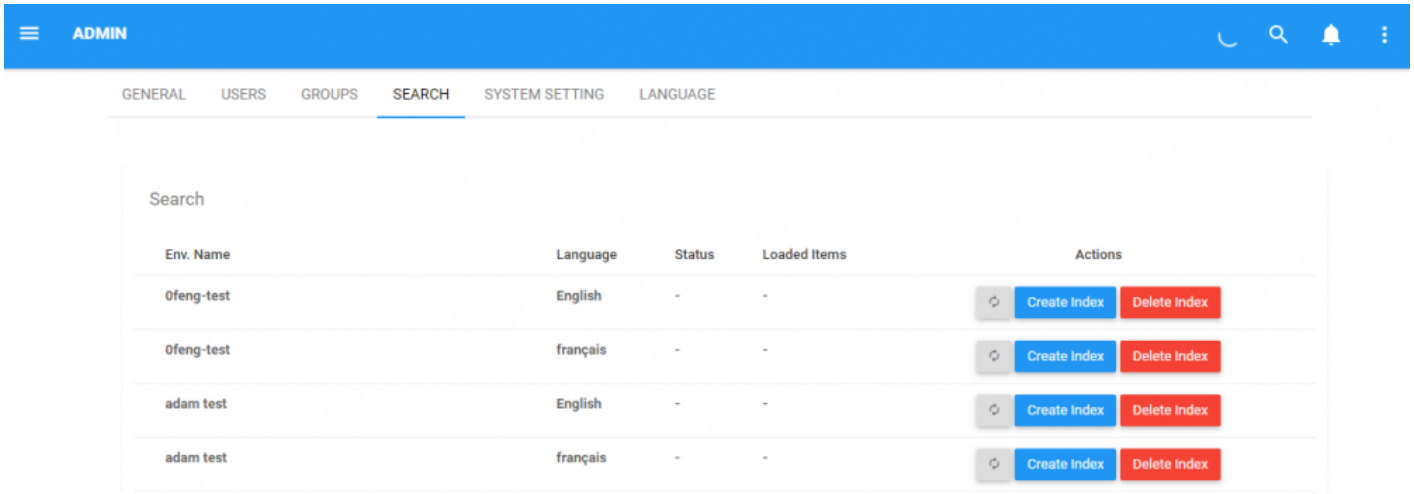
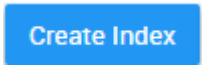
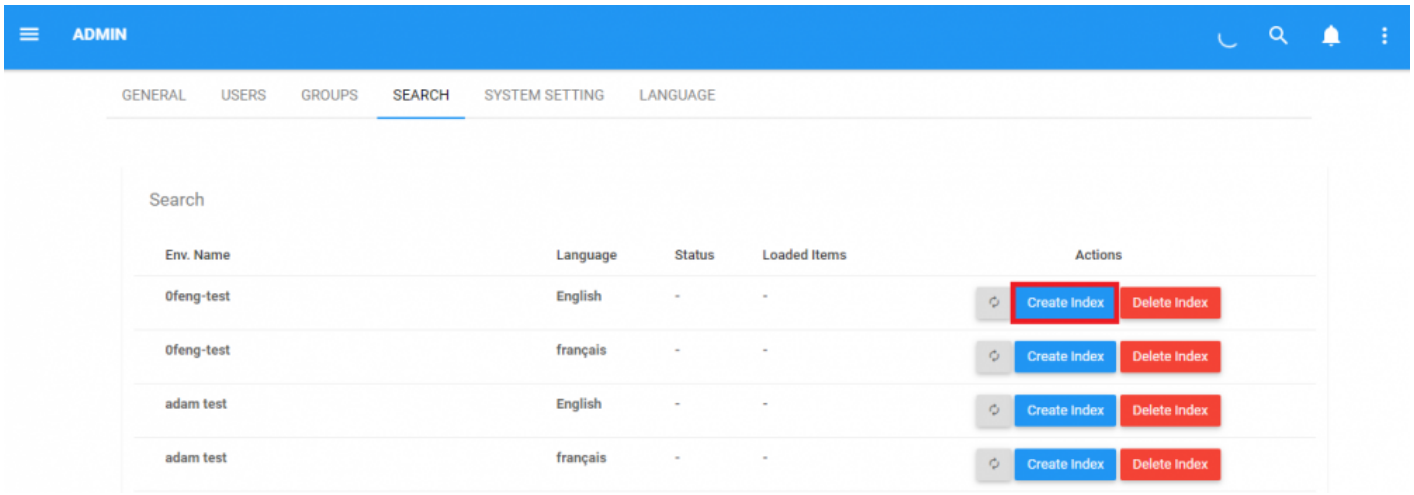
3. You will be navigated to the Search page



4. To create the Index, select the  icon



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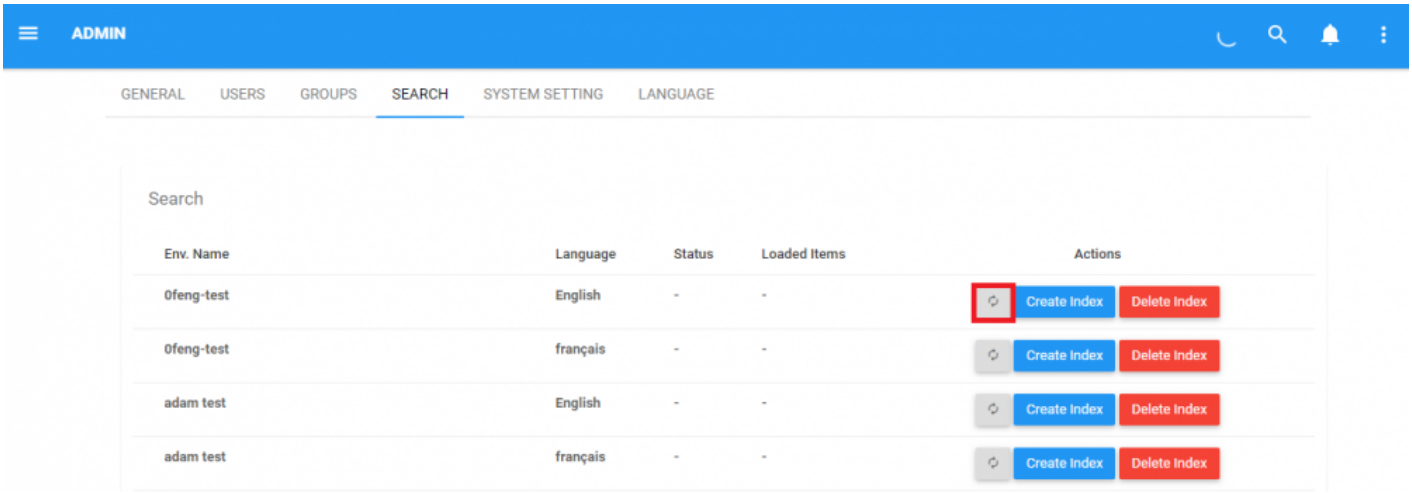
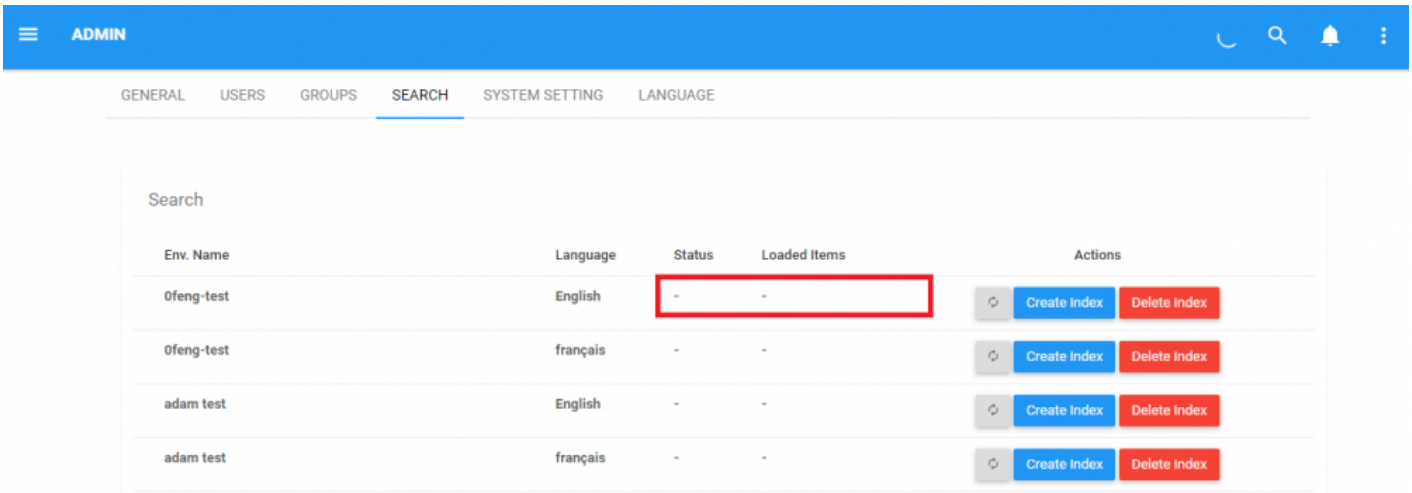
5. After the index has been created, select the refresh icon



6. Once the refresh, the status of the upload will be reflected within the “Status” and “Loaded Items” section



A Search Index must be loaded for the Search bar to function. Without uploading and Index, users will not be able to use the search function.

Loading an Index can be time consuming depending on Index size. It is recommended that Admins create of refresh indexes when traffic on the Web App is at a minimum (e.g. overnight).

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! Certain system settings can affect the speed of indexing and consequently, the performance of the EPC10 Web Application. See System Settings for descriptions and guidelines relating to search settings and their impact on one another.

! Making any changes to system settings may **compromise the performance** of the EPC. Please take caution when editing the pre-existing settings.

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10.1.5 System Settings

System Admins have access to system settings within the EPC Web App. The EPC Web App will be shipped to customers with these settings predefined; however System Admins do have access and can edit these as well. Editing these settings should be avoided without preexisting expertise.

The System Settings that System Admins have access to are as follows:

List of Settings

Key	Value
BPC_URL	http://nginx:80/api/v1
CHECK_NOTIFICATION_INTERVAL	60000
CHECK_SERVER_AVAILABILITY_IN_BROWSER	false
COGNOS_URL	http://
PASSPORT_KERBEROS	{ "servicePrincipalName": "HTTP/myvm.interfacing.co...
PASSPORT_KERBEROS_KEYTAB	
PASSPORT_LDAP	{ "ldap": { "url": "ldap://interfacing.local/DC=interfacing...
PASSPORT_NTLM	{ "domain": "interfacing.local", "domaincontroller": "lda...
PASSPORT_SAML	{ "entryPoint": "https://192.168.100.96/adfs/ls/", "issu...
PASSPORT_STRATEGY_TO_USE	LOCAL
PRIVATE_CACHE_URL	http://nginx:8080
SEARCH_FETCH_DELAY_BETWEEN_PAGES	1000
SEARCH_FETCH_ITEM_PER_PAGE	50
SEARCH_MAX_FILE_SIZE	5971520
SEARCH_UPDATE_TIMER_DEFAULT	60000
SEARCH_UPDATE_TIMER_PER_ENV_ID	
WEB_SERVICES_LOGGER_DEFAULT_LEVEL	warn
WEB_SERVICES_LOGGER_PER_MODULE	{ "api": "info" }
WEBTOKEN_EXPIRES_IN	10000d

A description of the settings is provided below:

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Item	Description
BPC_URL	The Url of the BPC server
CHECK_NOTIFICATION_INTERVAL	The time interval that the EPC Web App checks for Modeler changes generating user notifications. Denominated in milliseconds.
CHECK_SERVER_AVAILABILITY_IN_BROWSER	Enable/Disable Server Availability Notifications
ENABLES_DETAILS_COMPARISON	Enable/Disable comparison of details in Approval Cycle
PASSPORT_KERBEROS	KERBEROS Authentication protocol settings for Single Sign-On (SSO) Login
PASSPORT_KERBEROS_KEYTAB	Kerberos KEYTAB file in Base 64 format
PASSPORT_LDAP	LDAP Login protocol settings for authentication
PASSPORT_NTLM	NTLM Authentication protocol settings for Login
PASSPORT_SAML	SAML Authentication protocol settings for Login
PASSPORT_STRATEGY_TO_USE	Which login protocol to use. **Protocols**: Local, KERBEROS, LDAP, NTLM, SAML
PRIVATE_CACHE_URL	Address of internal cache port.
SEARCH_FETCH_DELAY_BETWEEN_PAGES	Delay between each new index page. **Denomination**: Milliseconds. **Default**: 1000ms (1 second) per page.
SEARCH_FETCH_ITEM_PER_PAGE	Number of objects per index page. **Denomination**: objects per page. **Default**: 25 per page.
SEARCH_MAX_FILE_SIZE	The maximum file size to be featured within the search engine. **Denomination**: Bytes. **Default**: 20,971,520 Bytes or 20 Megabytes. **Note**: Increasing the file size will slow down search functionality.
SEARCH_UPDATE_TIMER_DEFAULT	Time interval for new objects to be indexed for the WebApp search engine. **Denomination**: Milliseconds. **Default**: 300,000 Milliseconds (5 Minutes).
SEARCH_UPDATE_TIMER_PER_ENV_ID	Setting to define different Update Timer intervals for each environment.
WEB_SERVICES_LOGGER_DEFAULT_LEVEL	Minimum log level. The options are: error, warn, info, verbose, debug, silly
WEB_SERVICES_LOGGER_PER_MODULE	Setting to be enabled if System Admins want different log levels for different modules.
WEBTOKEN_EXPIRES_IN	The time interval by which the web token expires.

Web Token Example

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Value	Meaning
2d	2 days
1d	1 day
10h	10 hours
2.5h	2 hours and 30 minutes
1m	1 minute
5s	5 seconds
1y	1 year

As minimum requirements, we recommend **2 GB of RAM** for the Web App Search docker. Some search settings (SEARCH_FETCH_DELAY_BETWEEN_PAGES, SEARCH_FETCH_ITEM_PER_PAGE, SEARCH_MAX_FILE_SIZE) are interrelated and must be edited consequently so as to correctly manage available RAM and avoid Search Docker RAM overload. An Out Of Memory issue on the docker can lead to Web App slow-down or complete unresponsiveness.

As shown in the above table for System Settings, default search index parameters will load 25 objects per page every 1000 Milliseconds. Each object of the page will be loaded into RAM while indexing. With a default maximum file size of 20,917,520 Bytes (20 Mb), this means there is a maximum potential RAM load of (25 objects * 20 Mb) 500 Mb occupied by a search index. This will leave ample space for adequate search performance during indexing without substantially affecting the total total time period required to fully index the specific environment.

We highly recommend that any combinations of these parameters not exceed half of the allocated RAM for the search docker. For safe measure we have defined them to occupy 25% of recommended RAM. If you wish to adjust any of these three parameters, especially “SEARCH_MAX_FILE_SIZE’, RAM for the Search docker may need to be adjusted correspondingly.

Use this formula to ensure safe use of search settings:
(SEARCH_FETCH_DELAY_BETWEEN_PAGES * SEARCH_FETCH_ITEM_PER_PAGE * SEARCH_MAX_FILE_SIZE) <= (0.5 * Allocated Search docker RAM)

If a System Admin is unclear about the setting, it is recommended to leave the current setting. Erroneous editing of the settings could cause system malfunctions leading to down time. For further question, please contact your technical support team.

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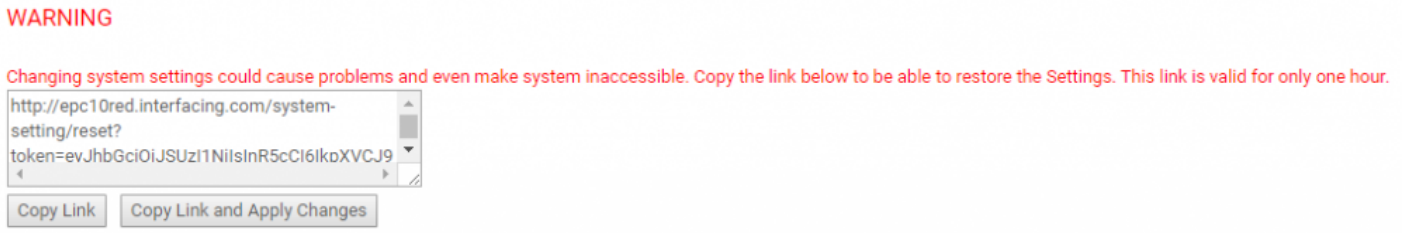
The EPC Web App provides a “Safety URL” for System Admins. This URL, if entered into the users selected web browser, reverts the EPC Web App to its initial settings. In order to apply any changes to the settings, users will be required to copy this link.

The warning, located at the top of the page is displayed as follows:



10.1.5.1 Editing Settings

A System Admin can edit the system settings. Editing these settings requires system expertise.

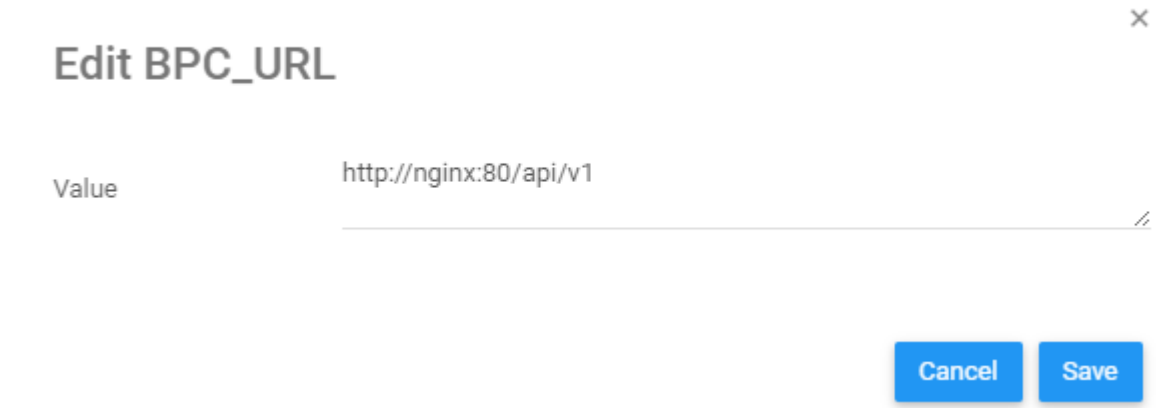
For further details of system edits, please see the steps below:

1. Navigate to the “System Admin” section of the EPC

2. Navigate to the “System Setting” tab

3. Select the Setting you would like to edit by selection the icon

4. A pop-up window will be generated on the page



5. Enter the desired setting in the text bar and click Save

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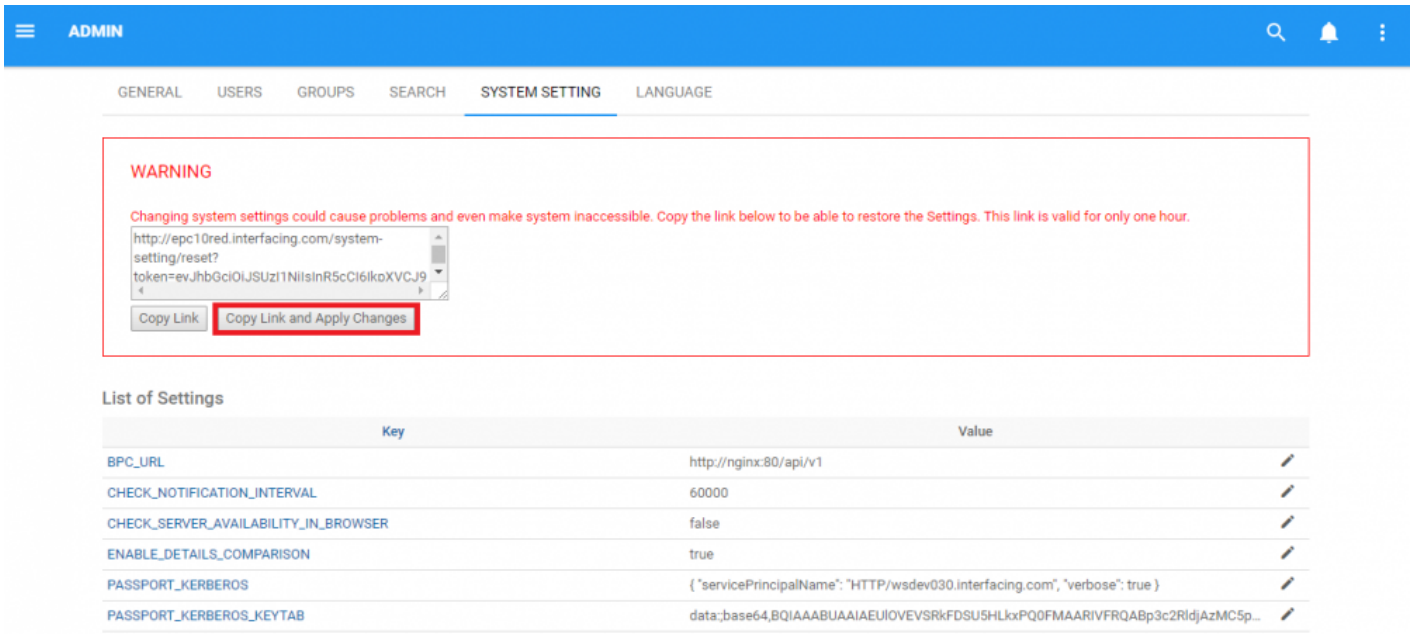
6. To apply the changes, navigate to the “Warning” box and select Copy Link and Apply Changes



7. To revert any changes, simply copy & paste the URL into your browser and the EPC settings will be re-set.

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10.1.6 Language

System Admins have 2 main responsibilities regarding system languages. The responsibilities are as follows:

- Manage System Languages
- Apply New Languages

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10.1.6.1 Managing Languages

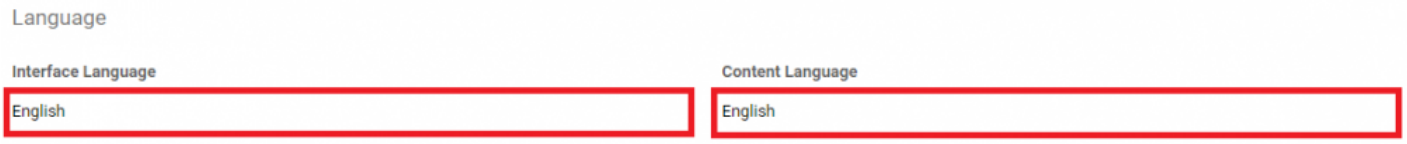
System Admins can select the Interface default and Content Language for the system. The languages selected will be the default languages for end users. End users themselves can further customize their language settings.

To toggle between languages, please see the steps below:

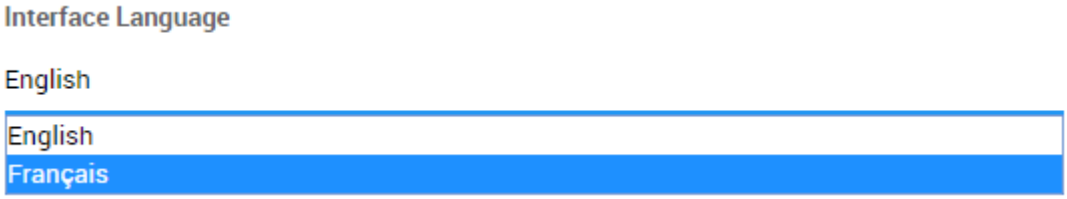
1. Navigate to the “System Admin” section of the EPC

2. Navigate to the Language tab

3. Select a Language text box



4. It will generate a drop-down menu featuring **all** available languages.



Changing content language requires EPC’s **multilingual license**

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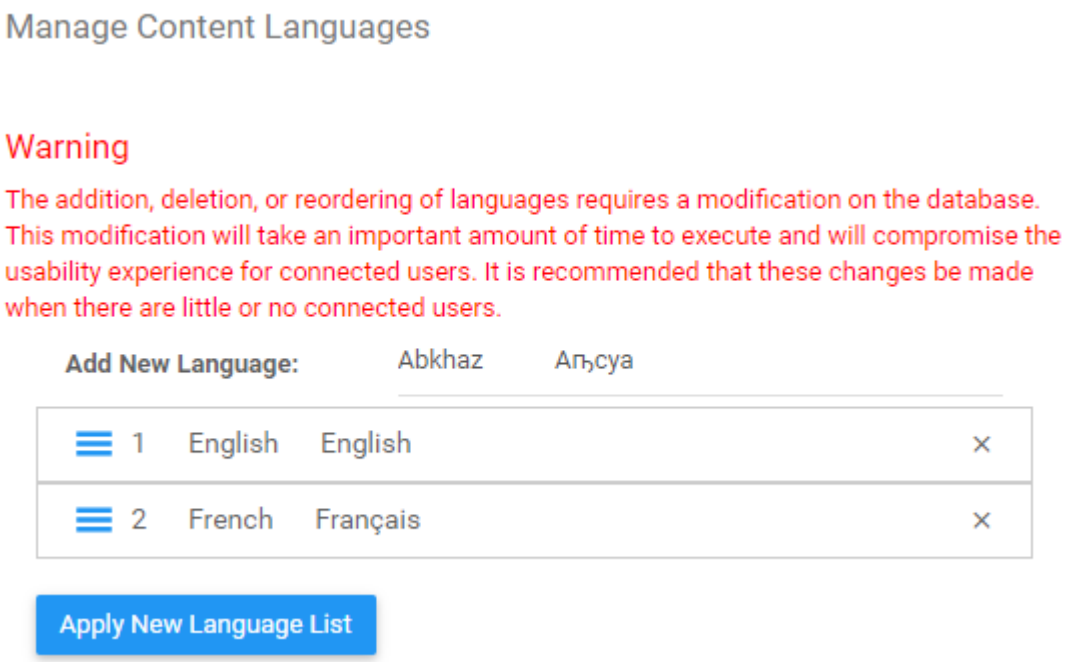
10.1.6.2 Applying New Languages

System Administrators are given the ability to edit the language lists featured in the EPC. While there are significant languages that can be added to the EPC, any editing of language will require **modifications on the user database** and should be avoided during high activity periods.

Please see the warning below:



The EPC data must be translated into the selected language in order for them to appear in that language in the Web App. **Note that this requires a Multi-lingual EPC license**.

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10.1.6.2.1 Understanding Content Languages

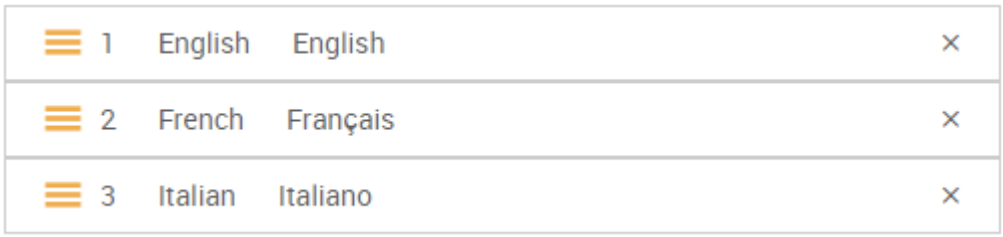
The languages displayed control both the available content when referencing a database and the hierarchy of data query activities.

Adding a content language requires the creation of new tables in MSSQL databases. These tables will feature the translated content (in the new language added) which would largely be a translated replication of the content in existing languages. The tables are required to order and organize the new data available, so upon user request, this data can be retrieved. Thus, adding a new language requires database modification.

The order of the languages represents the hierarchy of data searching activities. This meaning, that when users query content, which is available in multiple languages, the data which will be ultimately featured is prioritized based on the order of the languages.

Data queries will prioritize the content language selected by a user. If content is available in other languages (i.e. not the user's content language), it will follow the hierarchy displayed in the language list. If content matching the query criteria is only available in 1 language, the query will generate a result in this native language. When queried data does not match the user's content language, it will be displayed in its native language with a language abbreviation in brackets (e.g. French as [fr], English as [en], Spanish as [sp], etc.).

Please see the following examples with the language order below:



E.g.	User Content Language	Queried Object Available Languages	Result
1	English	English	En
2	English	French	[fr]
3	English	Italian	[it]
4	English	English, French	En
5	English	English, Italian	En
6	English	French, Italian	[fr]

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7	English	English, French, Italian	En
8	English	Spanish	N/A
9	French	English, French	Fr
10	French	English, Italian	[en]

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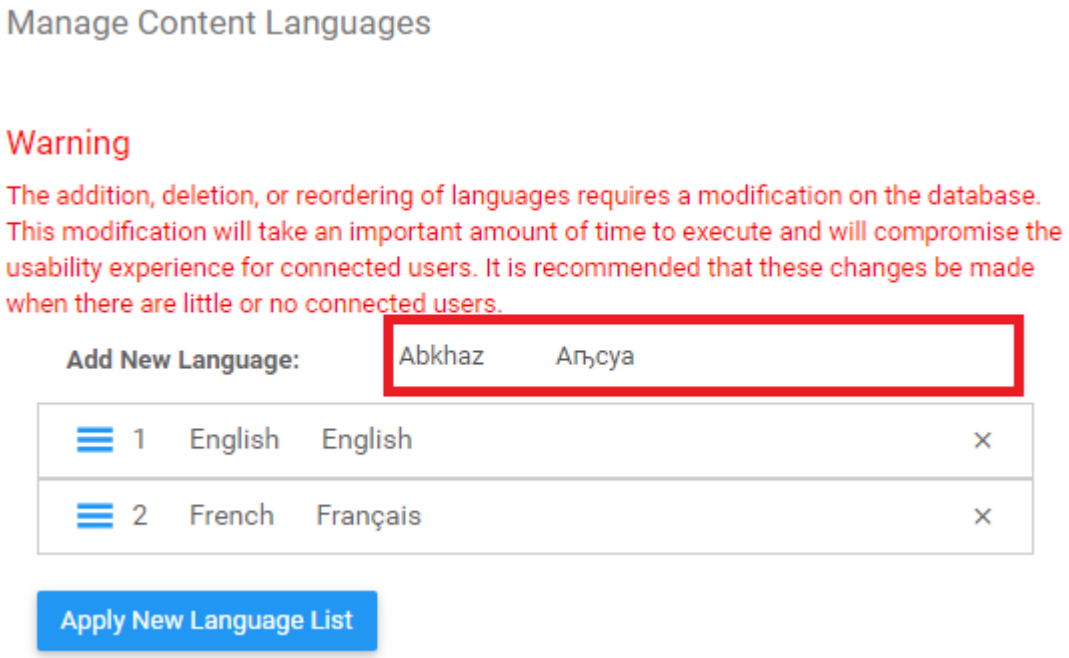
10.1.6.2.2 Add New Languages

If you wish to proceed and add a language, please see the steps below:

1. Navigate to the System Admin section

2. Select the Languages tab

3. Select the “Add New Language” toolbar



4. This will generate a drop-down menu featuring available languages

5. Select the desired language and select the Apply New Language List button.

10.1.6.2.3 Remove Languages

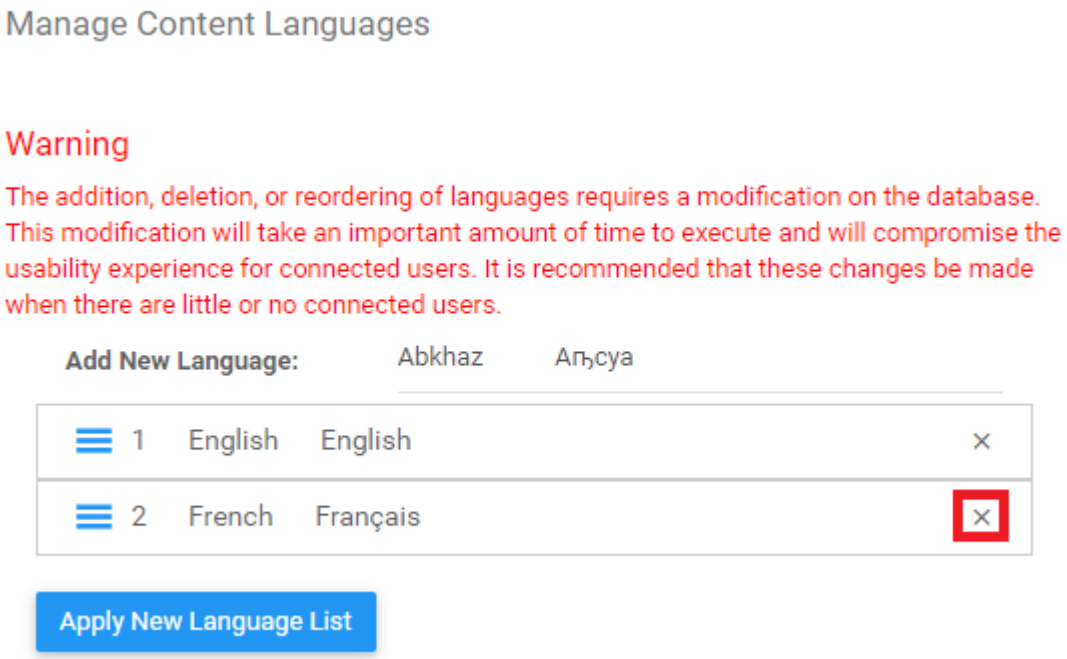
Removing languages will remove user's ability to view specific content created in the language deleted. While removing a language does not delete the overall content, it removes user's ability to query information created in this language.

To remove a language, please see the steps below:

1. Navigate to the System Admin section

2. Select the Languages tab

3. Select the × on the upper right corner



4. Select the desired language and select the Apply New Language List button.

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10.1.6.2.4 Reorder Languages

The order of the languages represents the hierarchy of data searching activities. This meaning, that when users query content, which is available in multiple languages, the data which will be ultimately featured is prioritized based on the order of the languages.

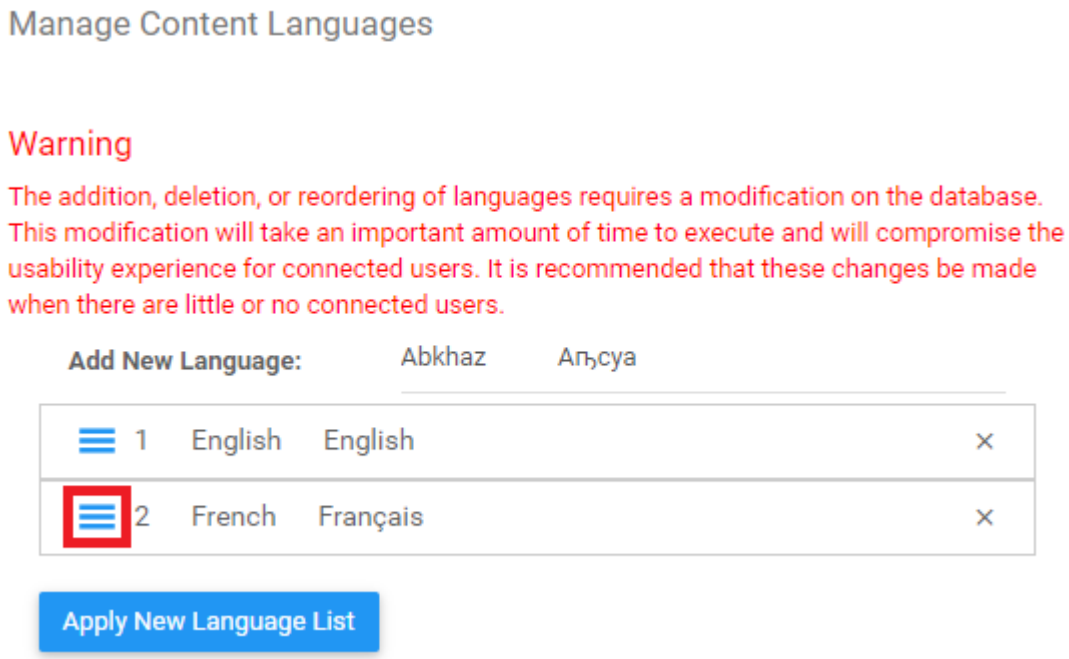
Reordering languages re-ranks the query hierarchy.

To reorder languages, please see the steps below:

1. Navigate to the System Admin section

2. Select the Languages tab

3. Select the ☰ and drag the selected language into the order that you desire



4. Select the desired language and select the Apply New Language List button.

10.2 System Defaults

System Admins have control over default settings for their specific system. Setting defaults allows System Admins to create templates for the users to optimize their use of the EPC. Environment Admins and End users can further edit their system settings.

There are 2 main areas that System Admins can set defaults for:

1. **Home Page**: This allows an System Admin to set the default Widgets that will appear on users' home screens.

2. **Graphs**: This allows an System Admin to set the default Map Graph Options for Processes (Graph Type, Icons & Annotation, Performance Color, etc.)

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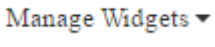
10.2.1 Home Page (Widgets)

System Admins can select the default Widget layout for system users. Selecting the default layout will allow system admins to control the initial settings of users Home pages, as well as provide the template should users reset their home page.

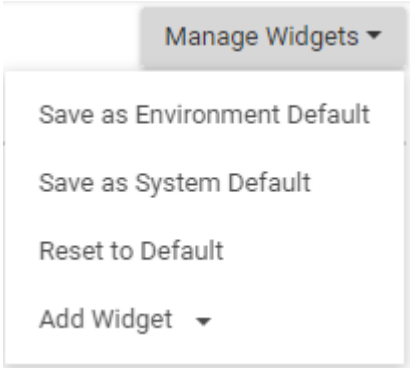
To Set a Home Page Widget Layout as a default layout, please see the steps below:

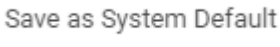
1. Log into the EPC

2. Navigate to and select the 

icon

3. This will generate a drop down menu



4. Select 

and your current Widget Layout will be saved as the System's default layout

> The Default Widget Layout set will be the current Widget Layout that the System Admin has displayed.

> Further details can be found in Home Page and Widget customization.

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11.0 Icons and Glossary

The following sections are provided to help users understand the content of the EPC, user manuals and excercises.

1. Web App Icons
2. Key Terms

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11.1 Icons

The EPC App Features a variety of Icons that provide users with visual representations of information. These icons are used to simplify navigation and viewing for users within the EPC Web App. The icons within the Web App can be broken down into 2 categories:

1. Navigation Icons
2. In-Graph Icons
3. Toolbar Icons

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11.1.1 Navigation Icons

Icon	Item
	User
	Password
	Search
	Notification
	Drop-Down Menu
	Navigation Menu
	Quick Graph View
	Edit
	Download
	Preview
	Home Module
	Process Module
	Organization Module
	Documents Module
	Collaboration Module
	Collaboration Icon

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	Set (Process, Document, Organization)
	Document Folder
   	Graphs • Impact • Map • Hierarchy
	• Performance Overview

11.1.2 In-Graph Icons

Icon	Item
	Roles
	Assets
	Documents
	Resources
	Org Units
	Risks
	Rules
	Controls
	Objectives
	Entities
	Attributes
	KCI
	KPI
	KRI
	Materials
	IPL

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	Categories
	Annotations
	Event & Gateway Name

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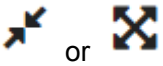
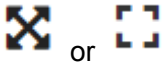
11.1.3 Toolbar Icons

Icon	Item
	Fit Screen
	Full Screen
	Zoom In
	Zoom Out
	Options
	Auto Layout
	Print
	• Unsubscribed • Subscribed

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11.2 Glossary (Key Terms)

A

Accountable: A component of the RASCI-VS Matrix denominating that a user is the “owner” of the work. You must sign off or approve when the task, objective or decision is complete.

Action: A set of activity performed by a user

Annotation: A note of explanation or comment added to a text or diagram

Asset : A specific, tangible object within an organization that is designed to assist and add value to business activities

Association: A connection or cooperative link between items

Attribute: A quality or feature regarded as a characteristic of an entity

B

Blocker: A classification of an action within the EPC. Signifies that the scenario has detrimental impact on a given situation.

C

Category: A sub-set of an item or activity that provides further detail to users

Collaboration Engagement: A set of activities users can engage in within the Collaboration Module. These engagements provide continuous improvement and encourage the sharing of best practices.

Contextual List: A list featured within the List View of EPC Modules featuring the direct sub-components of an item selected in the Navigation Tree

Consulted: A component of the RASCI-VS Matrix denominating someone who needs to give input before the work can be done and signed-off on

Control : An internal procedure or protocol designed to assure compliance

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Critical: A classification of an action within the EPC. Signifies that the scenario has wide-spread impact on a given situation.

D

Discussion: A Collaboration Engagement where a user wishes to further elaborate of a specific item within the EPC

Document : A formalized set of physical or electronic material designed to assist in performance of a task or role

Drilldown List: A list featured within the List View of EPC Modules, features all sub-components, direct or indirect of the item selected in the Navigation Tree

E

Entities : A data record featured as a component of metadata

Environment: A technological container, created by System Administrators for a specific function within the organization

Event: A scenario or action that has taken place

G

Governance: The oversight of business activities designed to assure compliance

Graph: A diagram showing the relation between variable scenarios

I

Icon: A representative symbol

Improvement Requests: A Collaboration Engagement where a request is made by an individual in effort optimizes a specific item within the EPC

Incident: A Collaboration Engagement where a user wishes to report a special scenario that causes concern or re-evaluation of established processes (E.g. Production Defect)

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Informed: A component of the RASCI-VS Matrix denominating someone who is notified when a task or process is performed

Item: Any object (node) that composes business architecture

K

Key Control Indicator: An indicator which is used by organizations to help define its controls environment and monitor levels of control relative to desired tolerances

Key Performance Indicator: A measurable value that demonstrates how effectively a company is achieving key business objectives

Key Risk Indicator: An indicator which is used by organizations to help define its risk profile and monitor changes in that profile

M

Major: A classification of an action within the EPC. Signifies that the scenario has significant impact on a given situation.

Material : An item used as inputs and outputs for various activities within processes

Metadata: A set of data that describes and gives information about other data

Minor: A classification of an action within the EPC. Signifies that the scenario has limited impact on a given situation.

Module: A set of standardized parts or independent units that can be used to construct a more complex structure

N

Normal: A classification of an action within the EPC. Signifies that the scenario has impact on a given situation.

Notifications: The action of informing a user or pertinent activity

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O

Object: Any node that composes business architecture

Objective : An overall organizational, departmental or personal goal

Organizational Unit : A specific sub-set of an organization responsible for a set of functions

P

Process : A series of actions or step taken in order to achieve a particular end

Q

Question: A form of Collaboration Engagement where a user is seeking clarification or explanation for an item within the Web App

R

Resource : An individual that adds vale within an organization

Responsible: A component of the RASCI-VS Matrix denominating someone who is the primary party in charge of an object within the Web App

Risk : An area of vulnerability and/or concern regarding a business' ability to perform necessary activities

Roles : Specific jobs or business functions that individuals (resources) are responsible for performing

S

Signatory: A component of the RASCI-VS Matrix denominating someone who needs to authorize an activity or confirmation of completion of an activity

Support: A component of the RASCI-VS Matrix denominating someone who is supposed to complement other individuals in the completion or maintenance of an item

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T

Task: A responsibility or function within a process

V

Verifier: A component of the RASCI-VS Matrix denominating someone who checks whether the product/ service meets the acceptance criteria set forth in the product description.

W

Widget: A component of an interface that enables a user to perform a function or access a service

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