



EPC10 - WebApp Manual

10.1 — Last update: 2018/05/15

Interfacing Technologies Corporation

Table of Contents

- Technical Support 13
- Disclaimer 14
- FAQs 15
- 1.0 Enterprise Process Center 16
 - 1.1 Process Viewing..... 17
 - 1.2 Collaborative Environment 19
 - 1.3 User Categories 20
 - 1.4 BPMN 2.0..... 21
 - 1.5 Governance 22
 - 1.6 Performance 24
- 2.0 EPC 10 Functions and Features 25
 - 2.1 Scalability & Security..... 26
 - 2.2 Mobile 27
 - 2.3 Impact Visibility 28
 - 2.4 Favorites and Subscriptions 29
 - 2.5 Published Only vs. Latest 30
 - 2.6 Widgets..... 31
 - 2.7 List View 32
 - 2.8 Quick Graph View 33
 - 2.9 Impact Graph 34
 - 2.10 Hierarchy Graph..... 35
 - 2.11 IPL Expansion 36
 - 2.12 Enhanced Process Approval Cycle..... 37
- 3.0 The Web App..... 38
 - 3.1 What is the Web App?..... 39
 - 3.2 What Can I do in EPC Web App? 40
 - 3.3 What is RASCI-VS? 41
- 4.0 Navigating the Web App..... 42
 - 4.1 Logging in 43
 - 4.1.1 Integrated Login (SSO) 45
 - 4.2 Home 46
 - 4.2.1 Widgets..... 47
 - 4.2.1.1 Default Widgets 49

4.2.1.2 Remove Widgets from Home Page	50
4.2.1.3 How to Add Widgets from Home Page	52
4.2.1.4 How to Customize Widgets	54
4.2.1.4.1 Customize My Objects Widgets	55
4.2.1.4.3 Customize My Performance Widgets	74
4.2.1.4.4 Customize My Actions Widgets.....	90
4.2.1.4.4 Customization Rules.....	94
4.2.1.4.4.1 Widget Filter Categories.....	99
4.2.1.5 How to Reset Default Widgets	102
4.2.1.6 How to Relocate Widgets within Home Page	103
4.2.1.6.1 Layout Options	104
4.2.1.6.2 Moving Widgets within a Home Page.....	108
4.2.1.7 Resizing Widgets	110
4.3 General Navigation	111
4.3.1 Navigation between Modules	113
4.3.2 Navigation within a Module	116
4.4 Process.....	121
4.4.1 Module Overview	122
4.4.2 List.....	124
4.4.2.1 Sorting.....	128
4.4.2.2 Filtering	130
4.4.2.2.1 Default Filter.....	132
4.4.2.2.2 Remove Filter	133
4.4.2.2.3 Add Filter.....	134
4.4.2.2.4 Combine Filter	135
4.4.2.3 Quick Graph View	136
4.4.3 Graph	137
4.4.3.1 Graph Navigation.....	138
4.4.3.1.1 Navigating in Graphs	141
4.4.3.1.1.1 Fit Screen	143
4.4.3.1.1.2 Full Screen.....	145
4.4.3.1.1.3 Zoom In.....	147
4.4.3.1.1.4 Zoom Out	149
4.4.3.1.1.5 Options	151
4.4.3.1.1.6 Auto Layout.....	159
4.4.3.1.1.7 Print	161
4.4.3.1.1.7.1 Printing from Internet Explorer	163
4.4.3.1.1.8 Subscribe	167
4.4.3.2 Map Graph.....	168

4.4.3.2.1 Graph View	169
4.4.3.2.2 Swimlanes	170
4.4.3.2.3 Matrix Swimlanes	172
4.4.3.2.4 Graph Customization	174
4.4.3.3 Impact Graph	206
4.4.3.4 Hierarchy Graph	211
4.4.4 Details	214
4.4.4.1 Navigation	215
4.4.4.1.1 Toolbar	217
4.4.4.1.1.1 Value-Stream Navigation	218
4.4.4.1.1.2 Hierarchy Navigation	221
4.4.4.1.1.3 Print	222
4.4.4.1.1.4 Subscribe	225
4.4.4.1.2 Details Drilldown	226
4.4.4.2 Attributes	228
4.4.4.2.1 Description	229
4.4.4.2.2 Goal	230
4.4.4.2.3 Responsibilities	231
4.4.4.2.4 Associations	232
4.4.4.2.5 Documents	233
4.4.4.2.6 Master Data	235
4.4.4.2.7 SIPOC	236
4.4.4.2.8 Properties	238
4.5 Performance	239
4.5.1 Module Overview	240
4.5.2 List	242
4.5.2.1 Sorting	245
4.5.2.2 Filtering	247
4.5.2.2.1 Add Filter	248
4.5.2.2.2 Remove Filter	250
4.5.2.2.3 Combine Filter	251
4.5.2.3 Quick Graph View	252
4.5.3 Graph	254
4.5.3.1 Graph Navigation	255
4.5.3.1.1 Navigating In Graphs	257
4.5.3.1.1.1 Fit Screen	259
4.5.3.1.1.2 Full Screen	261
4.5.3.1.1.3 Zoom In	263
4.5.3.1.1.4 Zoom Out	264

4.5.3.1.1.5 Print	265
4.5.3.1.1.6 Options	267
4.5.3.1.1.7 Subscribe	272
4.5.3.2 Impact Graph.....	273
4.5.3.3 Hierarchy Graph	277
4.5.3.4 Overview Graph.....	281
4.5.3.4.1 Inputting Performance	284
4.5.4 Details	286
4.5.4.1 Toolbar	287
4.5.4.1.1 Print	288
4.5.4.1.2 Subscribe	289
4.5.4.2 Attributes	290
4.5.4.2.1 Description	291
4.5.4.2.2 Responsibilities	292
4.5.4.2.3 Associations	293
4.5.4.2.4 Documents	294
4.5.4.2.5 Properties.....	296
4.6 Organization.....	297
4.6.1 Module Overview	299
4.6.2 List.....	301
4.6.2.1 Sorting.....	303
4.6.2.2 Filtering	305
4.6.2.2.1 Add Filter.....	306
4.6.2.2.2 Remove Filter	308
4.6.2.2.3 Combine Filter	309
4.6.2.3 Quick Graph View	310
4.6.3 Graph	311
4.6.3.1 Graph Navigation.....	312
4.6.3.1.1 Navigating In Graphs.....	313
4.6.3.1.1.1 Fit Screen	315
4.6.3.1.1.2 Full Screen.....	317
4.6.3.1.1.3 Zoom In.....	319
4.6.3.1.1.4 Zoom Out	320
4.6.3.1.1.5 Print	321
4.6.3.1.1.6 Options	323
4.6.3.1.1.7 Subscribe	328
4.6.3.2 Impact Graph.....	329
4.6.3.3 Hierarchy Graph	333
4.6.4 Details	336

4.6.4.1 Navigation	337
4.6.4.1.1 Toolbar	338
4.6.4.1.1.1 Print	339
4.6.4.1.1.2 Subscribe	340
4.6.4.2 Attributes	341
4.6.4.2.1 Description	342
4.6.4.2.2 Organization Sub Units	343
4.6.4.2.3 Directors	344
4.6.4.2.4 Documents	345
4.6.4.2.5 Properties	347
4.7 Documents	348
4.7.1 Module Overview	349
4.7.2 List	351
4.7.2.1 Sorting	354
4.7.2.2 Filtering	356
4.7.2.2.1 Add Filter	357
4.7.2.2.2 Remove Filter	359
4.7.2.2.3 Combine Filter	360
4.7.2.3 Quick Graph View	361
4.7.3 Graph	362
4.7.3.1 Graph Navigation	363
4.7.3.1.1 Navigating In Graphs	365
4.7.3.1.1.1 Fit Screen	367
4.7.3.1.1.2 Full Screen	369
4.7.3.1.1.3 Zoom In	371
4.7.3.1.1.4 Zoom Out	372
4.7.3.1.1.5 Print	373
4.7.3.1.1.6 Options	375
4.7.3.1.1.7 Subscribe	380
4.7.3.2 Impact Graph	381
4.7.3.3 Hierarchy Graph	384
4.7.4 Details	387
4.7.4.1 Navigation	388
4.7.4.1.1 Toolbar	389
4.7.4.1.1.1 Download	390
4.7.4.1.1.2 Preview	392
4.7.4.1.1.3 Print	402
4.7.4.1.1.4 Subscribe	403
4.7.4.2 Attributes	404

4.7.4.2.1 Description	405
4.7.4.2.2 File Details	406
4.7.4.2.3 Responsibilities	407
4.7.4.2.4 Associations	408
4.7.4.2.5 Documents	409
4.7.4.2.6 Properties	411
4.8 Risk	412
4.8.1 Module Overview	413
4.8.2 List	415
4.8.2.1 Sorting	418
4.8.2.2 Filtering	420
4.8.2.2.1 Add Filter	422
4.8.2.2.2 Remove Filter	424
4.8.2.2.3 Combine Filter	425
4.8.2.3 Quick Graph View	426
4.8.3 Graph	428
4.8.3.1 Graph Navigation	429
4.8.3.1.1 Navigation In Graphs	432
4.8.3.1.1.1 Fit Screen	434
4.8.3.1.1.2 Full Screen	436
4.8.3.1.1.3 Zoom in	438
4.8.3.1.1.4 Zoom Out	439
4.8.3.1.1.5 Print	440
4.8.3.1.1.6 Options	442
4.8.3.1.1.7 Subscribe	447
4.8.3.2 Impact Graph	448
4.8.3.3 Hierarchy Graph	453
4.8.3.4 Risk Profile Graph	456
4.8.4 Details	463
4.8.4.1 Navigation	464
4.8.4.1.1 Toolbar	465
4.8.4.1.1.1 Print	466
4.8.4.1.1.2 Subscribe	467
4.8.4.2 Attributes	468
4.8.4.2.1 Description	470
4.8.4.2.2 Risk Profile	471
4.8.4.2.3 Controls	472
4.8.4.2.4 Micro Risks	474
4.8.4.2.5 Documents	475

4.8.4.2.6 Responsibilities	477
4.8.4.2.7 Properties	478
4.9 Control	479
4.9.1 Module Overview	480
4.9.2 List	482
4.9.2.1 Sorting	485
4.9.2.2 Filtering	487
4.9.2.2.1 Add Filter	488
4.9.2.2.2 Remove Filter	490
4.9.2.2.3 Combine Filter	491
4.9.2.3 Quick Graph View	492
4.9.3 Graph	494
4.9.3.1 Graph Navigation	495
4.9.3.1.1 Navigation in Graphs	498
4.9.3.1.1.1 Fit Screen	500
4.9.3.1.1.2 Full Screen	502
4.9.3.1.1.3 Zoom in	503
4.9.3.1.1.4 Zoom Out	504
4.9.3.1.1.5 Print	505
4.9.3.1.1.6 Options	507
4.9.3.1.1.7 Subscribe	512
4.9.3.2 Impact Graph	513
4.9.3.3 Hierarchy Graph	517
4.9.4 Details	520
4.9.4.1 Navigation	521
4.9.4.1.1 Toolbar	522
4.9.4.1.1.1 Print	523
4.9.4.1.1.2 Subscribe	524
4.9.4.2 Attributes	525
4.9.4.2.1 Description	527
4.9.4.2.2 Documents	528
4.9.4.2.3 Risks	530
4.9.4.2.4 Advanced	532
4.9.4.2.5 IT	534
4.9.4.2.6 Financial	535
4.9.4.2.7 Responsibilities	536
4.9.4.2.8 Properties	537
4.10 Rule	538
4.10.1 Module Overview	539

4.10.2 List.....	541
4.10.2.1 Sorting.....	544
4.10.2.2 Filtering	546
4.10.2.2.1 Add Filter.....	547
4.10.2.2.2 Remove Filter	548
4.10.2.2.3 Combine Filter	549
4.10.2.3 Quick Graph View	550
4.10.3 Graph.....	552
4.10.3.1 Graph Navigation	553
4.10.3.1.1 Navigation In Graphs	556
4.10.3.1.1.1 Fit Screen.....	558
4.10.3.1.1.2 Full Screen	560
4.10.3.1.1.3 Zoom in	562
4.10.3.1.1.4 Zoom Out	563
4.10.3.1.1.5 Print	564
4.10.3.1.1.6 Options	566
4.10.3.1.1.7 Subscribe	571
4.10.3.2 Impact Graph	572
4.10.3.3 Hierarchy Graph	577
4.10.4 Details	580
4.10.4.1 Navigation	581
4.10.4.1.1 Toolbar	585
4.10.4.1.1.1 Print	586
4.10.4.1.1.2 Subscribe	587
4.10.4.2 Attributes	588
4.10.4.2.1 Description	590
4.10.4.2.2 Advanced	591
4.10.4.2.3 Responsibilities	592
4.10.4.2.4 Risks	593
4.10.4.2.5 Rules.....	594
4.10.4.2.6 Documents	595
4.10.4.2.7 Properties.....	597
4.11 Master Data	598
4.11.1 Module Overview	599
4.11.2 List.....	601
4.11.2.1 Sorting.....	604
4.11.2.2 Filtering	606
4.11.2.2.1 Add Filter.....	607
4.11.2.2.2 Remove Filter	609

4.11.2.2.3 Combine Filter	610
4.11.2.3 Quick Graph View	611
4.11.3 Graph.....	613
4.11.3.1 Graph Navigation	614
4.11.3.1.1 Navigation In Graphs	618
4.11.3.1.1.1 Fit Screen.....	620
4.11.3.1.1.2 Full Screen.....	622
4.11.3.1.1.3 Zoom in	624
4.11.3.1.1.4 Zoom Out	625
4.11.3.1.1.5 Print	626
4.11.3.1.1.6 Options	628
4.11.3.1.1.7 Subscribe	633
4.11.3.2 Impact Graph	634
4.11.3.3 Hierarchy Graph	638
4.11.4 Details	641
4.11.4.1 Navigation	642
4.11.4.1.1 Toolbar	643
4.11.4.1.1.1 Print	644
4.11.4.1.1.2 Subscribe	645
4.11.4.2 Attributes	646
4.11.4.2.1 Description	648
4.11.4.2.2 Responsibilities	649
4.11.4.2.3 Permission	650
4.11.4.2.4 Documents	651
4.11.4.2.5 Associations	654
4.11.4.2.6 Properties	655
4.12 Collaboration	656
4.12.1 Navigation.....	657
4.12.1.1 Collaboration Module	658
4.12.1.1.1 Sorting.....	660
4.12.1.1.2 Filtering	662
4.12.1.1.2.1 Add filter.....	663
4.12.1.1.2.2 Remove Filter.....	665
4.12.1.1.2.3 Combine Filter.....	666
4.12.1.2 Item Pages	667
4.12.2 Using Collaboration Features	670
4.12.2.1 Initiating Collaboration	671
4.12.2.2 Participating in Collaboration	679
4.12.2.2.1 Reply.....	680

4.12.2.2.2 Share	682
4.12.2.2.3 Vote.....	683
4.12.2.2.4 Close Topic	684
4.12.2.3 Monitoring Collaboration	686
4.12.2.4 Notification and Confirmation	687
4.12.3 Discussion	688
4.12.4 Question	689
4.12.5 Incident.....	690
4.12.6 Improvement Request.....	691
5.0 Search	693
5.1 Advanced Search	697
6.0 Notifications	699
6.1 Notification Organization	703
6.2 Enable/Disable Browser Notifications	710
6.2.1 Chrome Notifications.....	711
6.2.2 Firefox Notifications	712
7.0 Process Governance	714
7.1 Approval Cycle.....	715
7.1.1 Notification Emails	722
7.2 Confirmation.....	723
7.2.1 New Version Confirmation.....	724
8.0 My Profile	726
8.1 General	729
8.2 Preferences.....	730
8.2.1 Environment.....	731
8.2.2 Displayed Content.....	733
8.3 Language	735
8.4 Theme Roller	737
8.5 Authorizations	740
9.0 Environment Admin.....	741
9.1 Environment Settings	742
9.1.1 General.....	744
9.1.2 Search Index.....	747
9.1.3 Language.....	750
9.2 Environment Defaults	751
9.2.1 Home Page Widgets	752

9.2.2 Process Map Graph Options	753
9.2.3 Impact Graph Options	755
10.0 System Admin.....	757
10.1 General.....	759
10.1.1 Theme Settings.....	760
10.1.2 Publish Queue	765
10.1.3 Manage EPC Sessions	768
10.1.3.1 Sorting.....	769
10.1.3.2 Filtering	771
10.1.3.2.1 Add Filter.....	772
10.1.3.2.2 Remove Filter	774
10.1.3.2.3 Combine Filter	775
10.1.3.3 Closing	776
10.2 Environment.....	777
10.2.1 Add Environment	778
10.2.2 Edit Existing Environment	780
10.2.3 Delete Environment.....	783
10.2.4 Add Group to Environment.....	784
10.2.5 Add User to Environment	791
10.2.6 Set Environment Security.....	798
10.2.7 Sort Environment Table	803
10.2.8 Filter Environment Table	805
10.2.8.1 Add Filter	806
10.2.8.2 Remove Filter	808
10.3 Users	809
10.3.1 Add User.....	810
10.3.2 Edit Existing User.....	814
10.3.3 Delete User	824
10.3.4 Add User to Group	825
10.3.5 Add User to Environment	831
10.3.6 Set User Security	838
10.3.7 Sort User Table.....	843
10.3.8 Filter User Table	845
10.3.8.1 Add Filter	846
10.3.8.2 Remove Filter	848
10.3.8.3 Combine Filter	849
10.3.9 Synchronize with Active Directory	850
10.3.10 User Authorizations.....	853

10.4 Groups	854
10.4.1 Add Group	855
10.4.2 Edit Existing Group	858
10.4.3 Delete Group	862
10.4.4 Add User to Group	863
10.4.5 Add Environment to Group	870
10.4.6 Set Group Security	877
10.4.7 Sort Group Table	882
10.4.8 Filter Group Table	884
10.4.8.1 Add Filter	885
10.4.8.2 Remove Filter	887
10.4.8.3 Combine Filter	888
10.5 Search	889
10.6 Language	893
10.6.1 Manage Languages	894
10.6.2 Apply New Languages	896
10.6.2.1 Understanding Content Languages	897
10.6.2.2 Add New Languages	899
10.6.2.3 Remove Languages	903
10.6.2.4 Reorder Languages	905
10.7 Risk	906
10.7.1 Edit Risk Language	908
10.7.2 Risk Priority Settings	909
10.7.2.1 Edit Risk Priority	910
10.7.2.1.1 Edit Priority Name	911
10.7.2.1.2 Edit Priority Description	916
10.7.2.1.3 Edit Risk Priority Color	921
10.7.2.2 Edit Risk Priority Language	929
10.7.3 Risk Matrix Settings	934
10.7.3.1 Edit Risk Matrix	935
10.7.3.1.1 Edit Risk Likelihood	936
10.7.3.1.1.1 Edit Risk Likelihood Name	937
10.7.3.1.1.2 Edit Risk Likelihood Description	942
10.7.3.1.2 Edit Risk Impact	947
10.7.3.1.2.1 Edit Risk Impact Name	948
10.7.3.1.2.2 Edit Risk Impact Description	953
10.7.3.1.3 Edit Risk Profile	958
10.7.3.1.3.1 Edit Risk Profile Priority	959
10.7.3.1.3.2 Edit Risk Profile Score	966

10.7.3.2 Edit Risk Matrix Language	972
10.7.3.2.1 Edit Risk Likelihood Language.....	973
10.7.3.2.2 Edit Risk Impact Language	979
10.7.3.2.3 Edit Risk Profile Language	985
10.8 Attributes.....	990
10.8.1 Content Language.....	991
10.8.2 Object Types.....	993
10.8.2.1 Add Object Type	994
10.8.2.2 Edit Object Type	997
10.8.2.3 Delete Object Type	999
10.8.2.4 Search for Object Types	1000
10.8.3 Categories	1002
10.8.3.1 Add Category.....	1003
10.8.3.2 Edit Category	1005
10.8.3.3 Delete Category	1008
10.8.3.4 Search for Categories	1010
10.8.3 Attributes	1012
10.8.3.1 Add Attribute.....	1013
10.8.3.2 Edit Attribute	1016
10.8.3.3 Delete Attribute.....	1020
10.8.3.4 Search for Attributes	1021
10.9 Advanced	1023
10.9.1 Edit Settings	1027
10.10 Modeler.....	1029
10.10.1 General Preferences	1030
10.10.2 Modeler Preferences	1034
10.11 Home Page Widgets.....	1036
11.0 Icons and Glossary.....	1038
11.1 Icons	1039
11.1.1 Navigation Icons	1040
11.1.2 In-Graph Icons	1042
11.1.3 Toolbar Icons	1044
11.2 Glossary (Key Terms)	1045

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

Disclaimer

Copyright © 2017 Interfacing Technologies Corporation. All rights reserved.

This document, as well as the software described in it, is furnished under license and may be used or copied only in accordance with the terms of such license. The content of this document is furnished for informational use only, and due to product development, this information is subject to change without notice, and should not be construed as a commitment by Interfacing Technologies Corporation. Interfacing Technologies Corporation assumes no responsibility or liability for any errors or inaccuracies that may appear in this documentation. Except as permitted by such license, no part of this publication may be reproduced, stored in a retrieval system, or transmitted, in any form or by any means, electronic, mechanical, recording, or otherwise, without prior written permission of Interfacing Technologies Corporation.

The Interfacing Technologies logo and the Enterprise Process Center logo are trademarks of Interfacing Technologies Corporation.

Many of the designations used by manufacturers and sellers to distinguish their products are claimed as trademarks. Interfacing Technologies has made every effort to supply trademark information about manufacturers and their products mentioned in this publication. For the most up to date list, please refer to the Enterprise Process Center Online Help.

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](#).

6. Why my new languages settings have not been updated to the modeler?

When changing languages settings, you must also restart the EPC server. This will require your IT/System Admin support, please see [section 10.4.6.6](#).

1.0 Enterprise Process Center

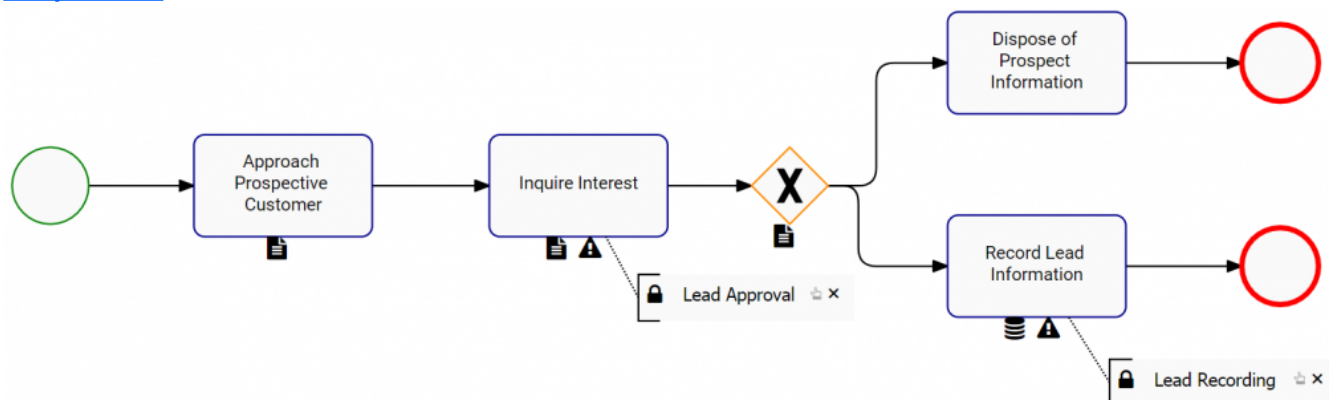
Enterprise Process Center (EPC) helps companies gain a 360 degree blueprint of the organization in support of complex improvement, compliance and transformation initiatives. The EPC goes beyond process mapping & analysis, it covers the full spectrum of lifecycle governance and collaboration, enterprise 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.



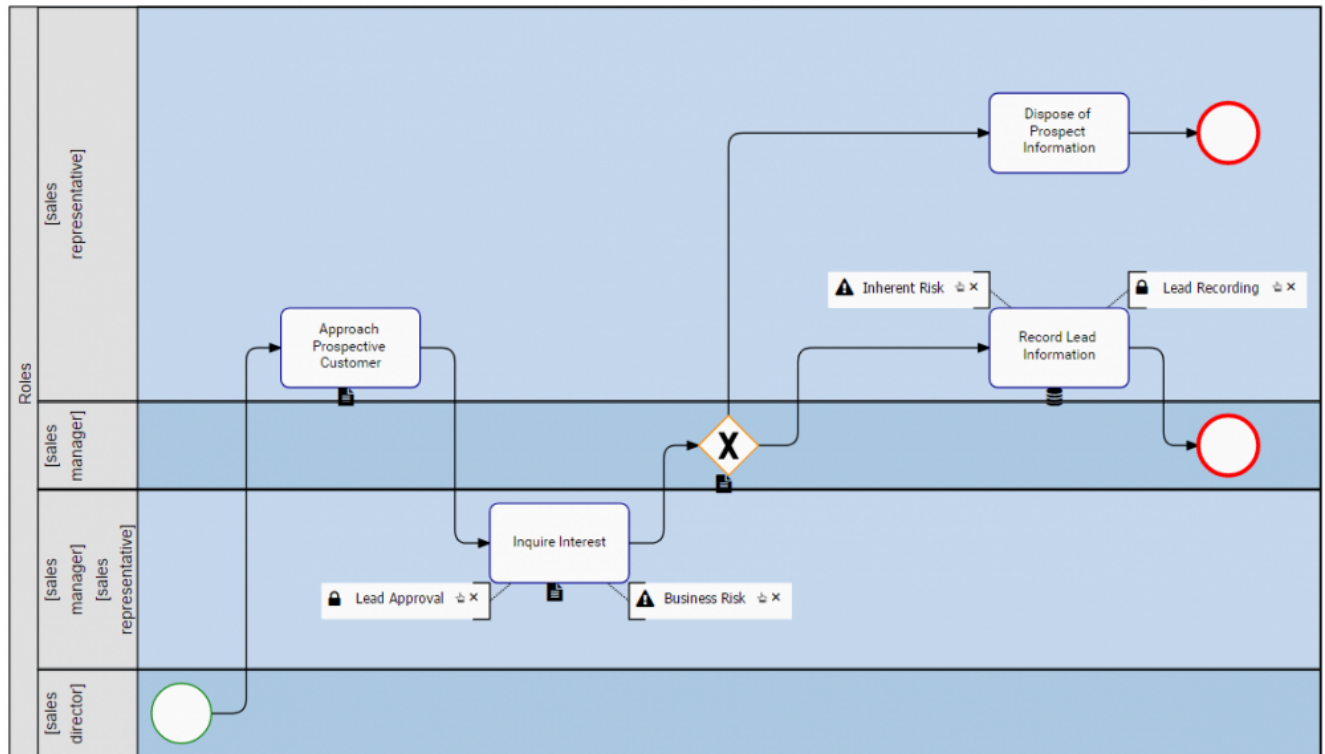
1.1 Process Viewing

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.

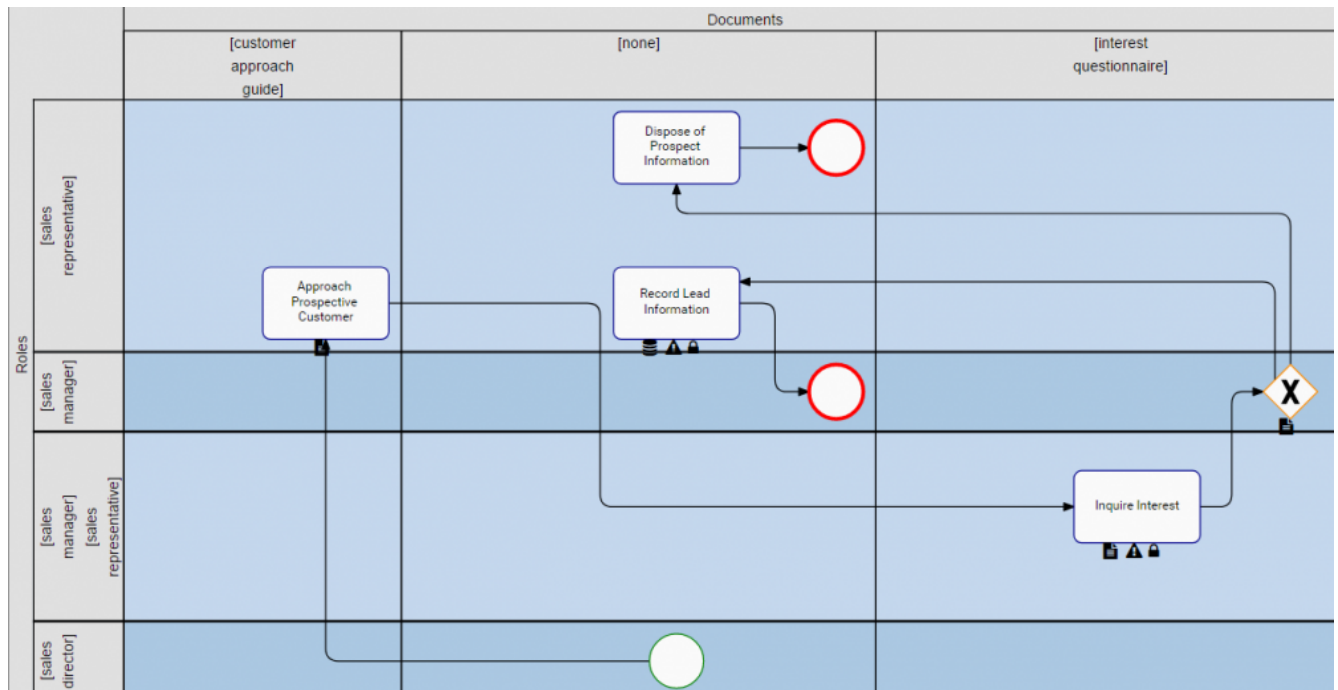
1. [Graph View](#)



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 [4.12 Collaboration](#).

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)	<ul style="list-style-type: none">• 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)	<ul style="list-style-type: none">• Approve process flow and process components changes• Approve process improvement requests• Follow process revisions frequencies• Follow the maturity of processes
Business Users (Analytical User)	<ul style="list-style-type: none">• 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)	<ul style="list-style-type: none">• Need to understand the process they are working on• Access to detailed task descriptions
System Admin (Admin User)	<ul style="list-style-type: none">• Monitor and maintain system functionality• Oversee system use and maintenance activities

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.



OBJECT MANAGEMENT GROUP

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

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.

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.

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 (KCI) 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 cyclicity, 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](#).

2.0 EPC 10 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](#)



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.

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.

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.

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](#).

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](#).

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](#).

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](#).

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](#).

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](#).

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 Hierarchy 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](#).

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](#).

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](#).

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.

The screenshot displays the EPC10 Web App interface with a blue header bar containing a menu icon, the word "HOME", a search icon, a notification bell, and a settings icon. A "Manage Widgets" dropdown is visible in the top right corner.

Roles & Org Units

Graph	Name	Type	Last Modified
	Acquisition Model #1	Document	09-Jun-2017
	Acquisition Model #2	Document	11-Apr-2017
	Acquisition Model #3	Document	11-Apr-2017
	Acquisition Model #4	Document	11-Apr-2017
	Acquisition Model #5	Document	11-Apr-2017
	Acquisition Model #6	Document	11-Apr-2017
	Customer Approach Guide	Document	11-Apr-2017
	Industry Report #1	Document	04-Apr-2017
	Industry Report #2	Document	04-Apr-2017
	Industry Report #3	Document	04-Apr-2017
	Interest Questionnaire	Document	11-Apr-2017

Navigation: 1 2 >

My Documents

Graph	Name	Type	Last Modified
	Acquisition Model #1	Document	09-Jun-2017
	Acquisition Model #2	Document	11-Apr-2017
	Acquisition Model #3	Document	11-Apr-2017
	Acquisition Model #4	Document	11-Apr-2017
	Acquisition Model #5	Document	11-Apr-2017
	Acquisition Model #6	Document	11-Apr-2017

Navigation: 1 >

My Objects

Graph	Name	Type	Last Modified
	Customer Relationship Management	Process	26-May-2017
	Lead Generation Process	Process	12-Jun-2017

Navigation: 1 >

My Performance

Name	Type	Value	Unit	Color
Convert Inquiries into Leads	KPI		Percentage	
Cost Synergies	KPI	115	%	
Customer Satisfaction Levels	KPI		Percentage	
Employees Hired	KPI		Number	
KCI 1	KCI	40	USD	
KRI 1	KRI		Percentage	
Lead Conversion	KPI		Percentage	
Mentorship Hours	KPI			
Revenue Synergies	KPI		%	

Navigation: 1 >

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.

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

3.3 What is RASCI-VS?

RASCI-VS is a simple grid system that brings structure and clarity to understanding the roles that various stakeholders play with regards to an object or activity. 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, is a verifier, or signatory for any object or activity.

RASCI-VS provides the following benefits:

- 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.

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.

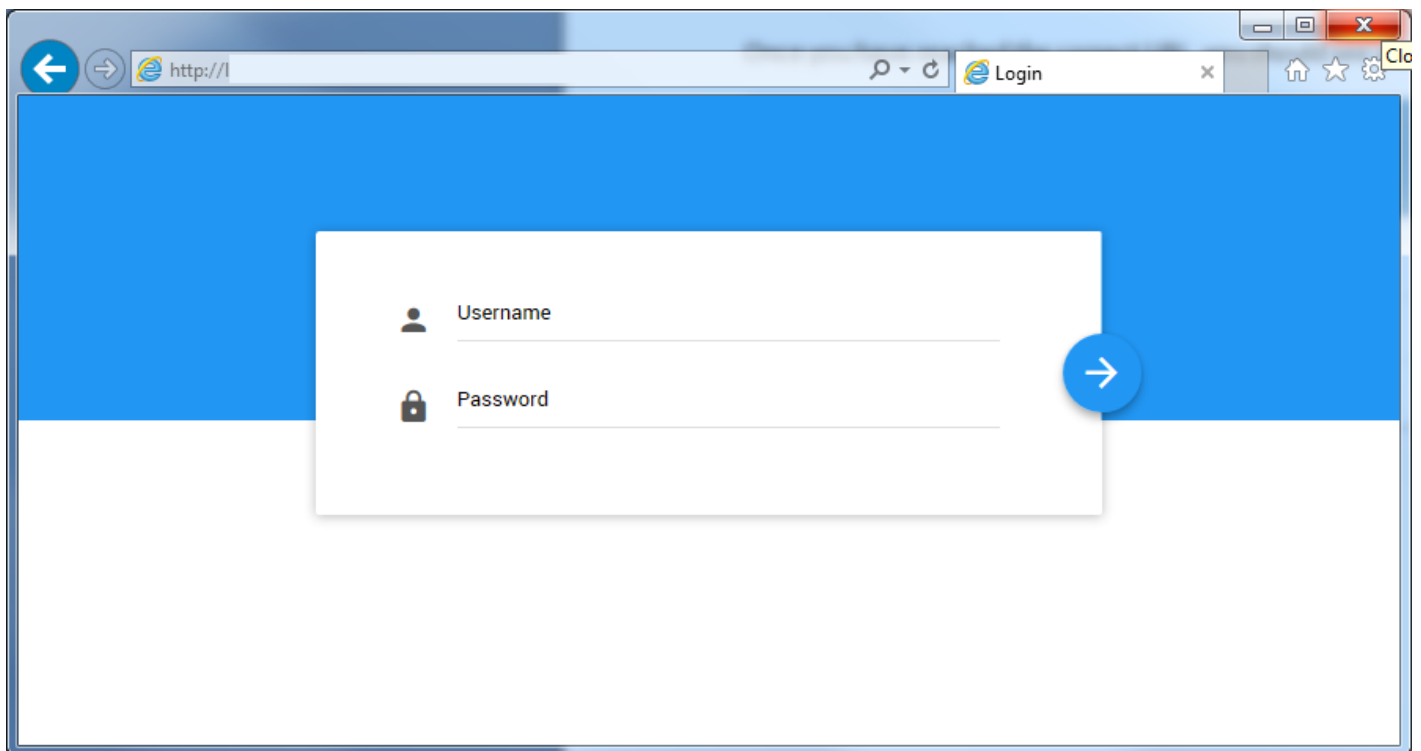
Below is listed the following features that will be covered in the navigation section:

1. [Logging In](#)
2. [Home](#)
3. [General Navigation](#)
4. [Process](#)
5. [Performance](#)
6. [Organization](#)
7. [Documents](#)
8. [Risk](#)
9. [Control](#)
10. [Rule](#)
11. [Master Data](#)
12. [Collaboration](#)


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.

The image displays two sequential screenshots of a login form, illustrating the state of the input fields during a login process. The form is contained within a white box with a blue border and a blue header bar.

Top Screenshot: The form has two input fields. The first field, labeled "username" with a user icon, contains the text "1" which is highlighted by a red square. The second field, labeled with a lock icon and containing ten dots, has the text "2" highlighted by a red square. To the right of the password field is an eye icon. A blue circular button with a white right-pointing arrow is positioned to the right of the form.

Bottom Screenshot: The form is in the same state, but the input has progressed. The "username" field now contains the text "username". The "password" field now contains the text "password". The red square labeled "3" is now positioned to the right of the password field, indicating the next step in the process. The eye icon and the blue arrow button remain in the same positions.

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.

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.

HOME

Manage Widgets

My Processes & Tasks

Graph	Name	Type	Last Modified
	Accounting	Process	04-Apr-2017
	Acquire Target	Task	04-Apr-2017
	Acquisition Process	Process	04-Apr-2017
	After-Sales Support	Process	04-Apr-2017
	Analyze Business Segments	Task	04-Apr-2017
	Contact Customer	Task	04-Apr-2017
	Customer Approach	Task	04-Apr-2017
	Evaluate Targets	Task	04-Apr-2017
	Financial Statement Preparation	Process	04-Apr-2017
	Identify Prospective Targets	Task	04-Apr-2017
	Industry Research Process	Process	04-Apr-2017

My Documents

Graph	Name	Type	Last Modified
	Acquisition #1 Model	Document	04-Apr-2017
	Acquisition #2 Model	Document	04-Apr-2017
	Acquisition #3 Model	Document	04-Apr-2017
	Industry Report #1	Document	04-Apr-2017
	Industry Report #3	Document	04-Apr-2017

My Favorites

Roles & Org Units

Graph	Name	Type	Last Modified
	A/P Clerk	Role	04-Apr-2017
	A/R Clerk	Role	04-Apr-2017

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	<p>A Widget window used to feature any object within the EPC. These items can be processes, process components and/or associated items.</p> <p>This Widget can feature:</p> <ol style="list-style-type: none"> 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 (KCIIs) 16. Key Risk Indicators (KRIs)
My Performance	<p>A Widget window allowing users to feature company, department and personal Performance Measures.</p> <p>This Widget can feature:</p> <ol style="list-style-type: none"> 1. Key Performance Indicators (KPIs) 2. Key Control Indicators (KCIIs) 3. Key Risk Indicators (KRIs)
My Actions	<p>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.</p> <p>This Widget can feature:</p> <ol style="list-style-type: none"> 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

Widget Navigation

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

The screenshot shows the EPC10 WebApp Home page. The header is blue with a hamburger menu, 'HOME', search, notifications, and user icons. A 'Manage Widgets' button is in the top right. The main content area has two widgets: 'My Objects' and 'My Performance'.

My Objects

Graph	Name	Type	Last Modified
	Accounting	Process	04-Apr-2017
	Acquisition Process	Process	11-Apr-2017
	Advertising Process	Process	13-Apr-2017
	After-Sales Support	Process	13-Apr-2017
	Customer Relationship Management	Process	13-Apr-2017
	Entering Customer Information	Process	13-Apr-2017
	Financial Statement Preparation	Process	04-Apr-2017
	I/S	Process	13-Apr-2017
	Industry Research Process	Process	04-Apr-2017
	Integration Process	Process	04-Apr-2017
	Lead Conversion Process	Process	26-Apr-2017

« < 1 2 > »

My Actions

Graph	Name	Action Type	Pending Since	Type
	Lead Conversion Process	Approval	27-Apr-2017	Process

« < 1 > »

My Performance

Name	Type	Value	Unit	Color
Convert Inquiries into Leads	KPI		Percentage	
Cost Synergies	KPI	123	%	●
KCI 1	KCI	40	USD	●
KRI 1	KRI		Percentage	
Revenue Synergies	KPI		%	

« < 1 > »

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.

This screenshot is identical to the previous one but includes red and blue highlights to illustrate navigation. In the 'My Objects' table, the 'Acquisition Process' row has a red box around its graph icon and a blue box around its name. In the 'My Performance' table, the 'Cost Synergies' row has a blue box around its name.

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.

HOME

Manage Widgets

My Processes & Tasks

Graph	Name	Type	Last Modified
	Accounting	Process	04-Apr-2017
	Acquire Target	Task	04-Apr-2017
	Acquisition Process	Process	04-Apr-2017
	After-Sales Support	Process	04-Apr-2017
	Analyze Business Segments	Task	04-Apr-2017
	Contact Customer	Task	04-Apr-2017
	Customer Approach	Task	04-Apr-2017
	Evaluate Targets	Task	04-Apr-2017
	Financial Statement Preparation	Process	04-Apr-2017
	Identify Prospective Targets	Task	04-Apr-2017
	Industry Research Process	Process	04-Apr-2017

My Documents

Graph	Name	Type	Last Modified
	Acquisition #1 Model	Document	04-Apr-2017
	Acquisition #2 Model	Document	04-Apr-2017
	Acquisition #3 Model	Document	04-Apr-2017
	Industry Report #1	Document	04-Apr-2017
	Industry Report #3	Document	04-Apr-2017


My Favorites

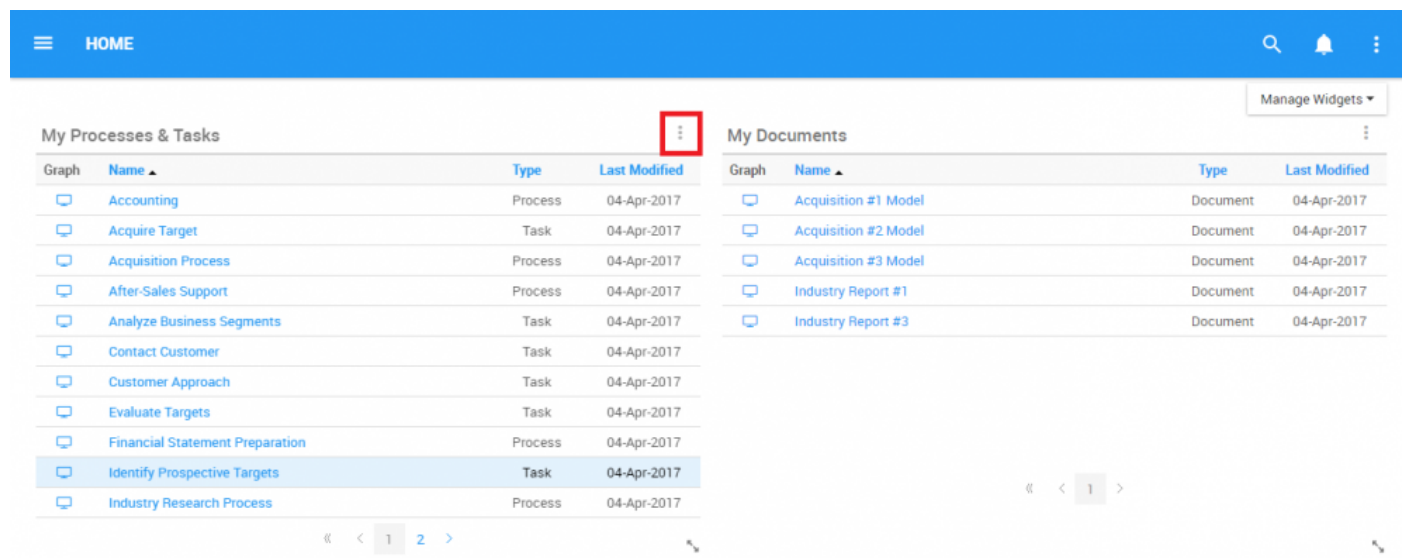
Roles & Org Units

Graph	Name	Type	Last Modified
	A/P Clerk	Role	04-Apr-2017
	A/R Clerk	Role	04-Apr-2017

4.2.1.2 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

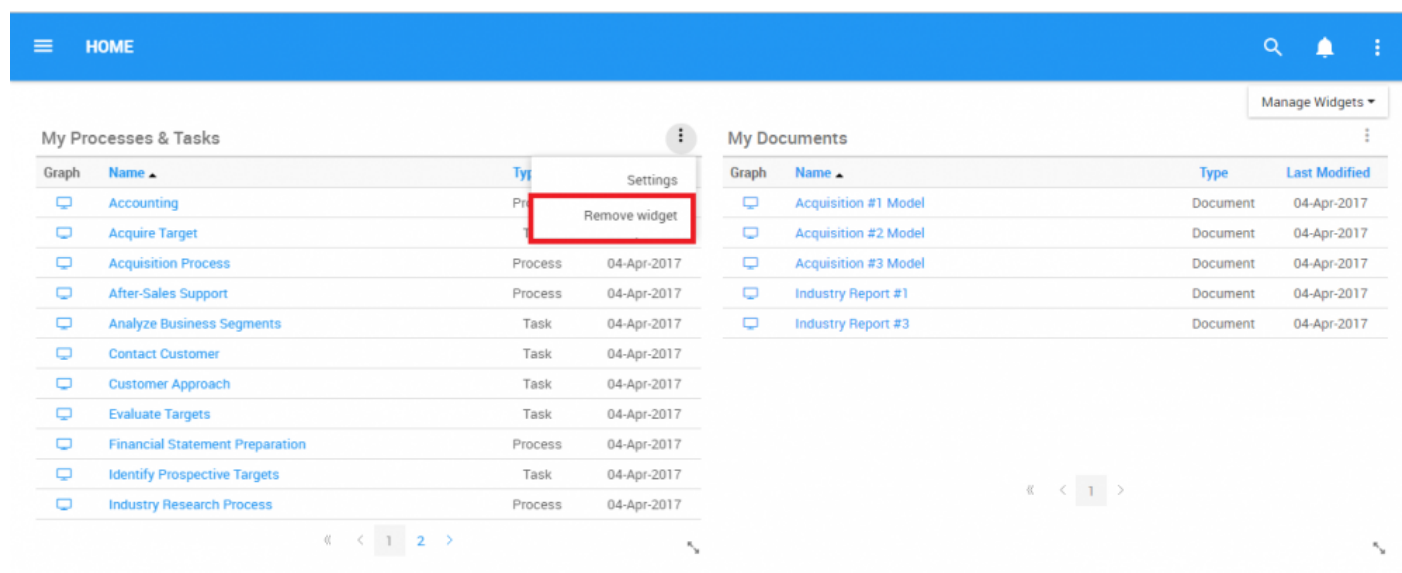


The screenshot shows the Home page with a blue header bar containing a menu icon, the word 'HOME', a search icon, a bell icon, and a 'More options' icon. Below the header, there are two main sections: 'My Processes & Tasks' and 'My Documents'. The 'My Processes & Tasks' section contains a table with columns 'Graph', 'Name', 'Type', and 'Last Modified'. A red box highlights the 'More options' icon (three vertical dots) in the top right corner of this table. The 'My Documents' section contains a similar table with columns 'Graph', 'Name', 'Type', and 'Last Modified'.

Graph	Name	Type	Last Modified
	Accounting	Process	04-Apr-2017
	Acquire Target	Task	04-Apr-2017
	Acquisition Process	Process	04-Apr-2017
	After-Sales Support	Process	04-Apr-2017
	Analyze Business Segments	Task	04-Apr-2017
	Contact Customer	Task	04-Apr-2017
	Customer Approach	Task	04-Apr-2017
	Evaluate Targets	Task	04-Apr-2017
	Financial Statement Preparation	Process	04-Apr-2017
	Identify Prospective Targets	Task	04-Apr-2017
	Industry Research Process	Process	04-Apr-2017

Graph	Name	Type	Last Modified
	Acquisition #1 Model	Document	04-Apr-2017
	Acquisition #2 Model	Document	04-Apr-2017
	Acquisition #3 Model	Document	04-Apr-2017
	Industry Report #1	Document	04-Apr-2017
	Industry Report #3	Document	04-Apr-2017

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



The screenshot shows the Home page with the 'My Processes & Tasks' widget. A red box highlights the 'Remove widget' button in the dropdown menu that appears when the 'More options' icon is clicked. The 'My Documents' section is also visible.

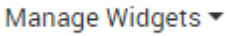
Graph	Name	Type	Last Modified
	Accounting	Process	04-Apr-2017
	Acquire Target	Task	04-Apr-2017
	Acquisition Process	Process	04-Apr-2017
	After-Sales Support	Process	04-Apr-2017
	Analyze Business Segments	Task	04-Apr-2017
	Contact Customer	Task	04-Apr-2017
	Customer Approach	Task	04-Apr-2017
	Evaluate Targets	Task	04-Apr-2017
	Financial Statement Preparation	Process	04-Apr-2017
	Identify Prospective Targets	Task	04-Apr-2017
	Industry Research Process	Process	04-Apr-2017

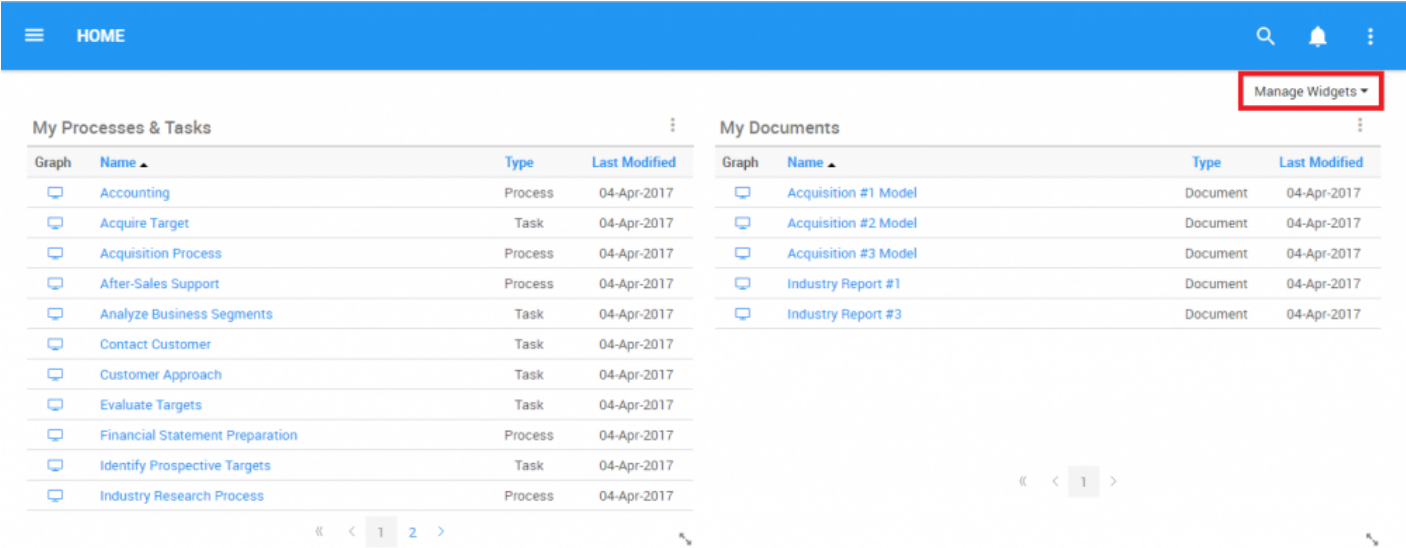
Graph	Name	Type	Last Modified
	Acquisition #1 Model	Document	04-Apr-2017
	Acquisition #2 Model	Document	04-Apr-2017
	Acquisition #3 Model	Document	04-Apr-2017
	Industry Report #1	Document	04-Apr-2017
	Industry Report #3	Document	04-Apr-2017

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

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

The screenshot shows the 'HOME' page of the EPC10 WebApp. It features two main sections: 'My Processes & Tasks' and 'My Documents'. A 'Manage Widgets' dropdown menu is open, showing options: 'Reset to Default', 'Add Widget', 'My Objects', 'My Performance', and 'My Actions'. The 'My Objects' option is highlighted with a red box.

Graph	Name	Type	Last Modified
Accounting	Accounting	Process	04-Apr-2017
Acquire Target	Acquire Target	Task	04-Apr-2017
Acquisition Process	Acquisition Process	Process	04-Apr-2017
After-Sales Support	After-Sales Support	Process	04-Apr-2017
Analyze Business Segments	Analyze Business Segments	Task	04-Apr-2017
Contact Customer	Contact Customer	Task	04-Apr-2017
Customer Approach	Customer Approach	Task	04-Apr-2017
Evaluate Targets	Evaluate Targets	Task	04-Apr-2017
Financial Statement Preparation	Financial Statement Preparation	Process	04-Apr-2017
Identify Prospective Targets	Identify Prospective Targets	Task	04-Apr-2017
Industry Research Process	Industry Research Process	Process	04-Apr-2017

Graph	Name	Type	Last Modified
Acquisition #1 Model	Acquisition #1 Model	Document	04-Apr-2017
Acquisition #2 Model	Acquisition #2 Model	Document	04-Apr-2017
Acquisition #3 Model	Acquisition #3 Model	Document	04-Apr-2017
Industry Report #1	Industry Report #1	Document	04-Apr-2017
Industry Report #3	Industry Report #3	Document	04-Apr-2017

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

The screenshot shows the 'HOME' page of the EPC10 WebApp after adding the 'My Objects' widget. The 'My Objects' widget is highlighted with a red box and contains a table with two rows: 'Accounting' and 'Acquisition Process'. The 'My Documents' section is also visible, showing a list of documents. The 'Roles & Org Units' section is also visible, showing a list of roles.

Graph	Name	Type	Last Modified
Accounting	Accounting	Process	04-Apr-2017
Acquisition Process	Acquisition Process	Process	04-Apr-2017

Graph	Name	Type	Last Modified
Acquisition #1 Model	Acquisition #1 Model	Document	04-Apr-2017
Acquisition #2 Model	Acquisition #2 Model	Document	04-Apr-2017
Acquisition #3 Model	Acquisition #3 Model	Document	04-Apr-2017
Industry Report #1	Industry Report #1	Document	04-Apr-2017
Industry Report #3	Industry Report #3	Document	04-Apr-2017

Graph	Name	Type	Last Modified
A/P Clerk	A/P Clerk	Role	04-Apr-2017
A/R Clerk	A/R Clerk	Role	04-Apr-2017

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.

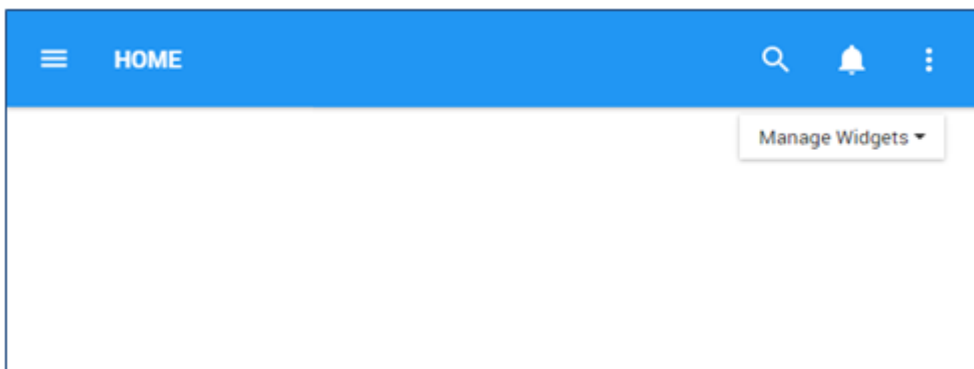
Rule	Description
AND	AND clauses allow users to examine information with greater depth by providing more filters for data being queried. The result of using filters with AND clauses are that less data will be featured in the Widget.
OR	OR clauses allow users to examine information with greater scope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

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 to 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.

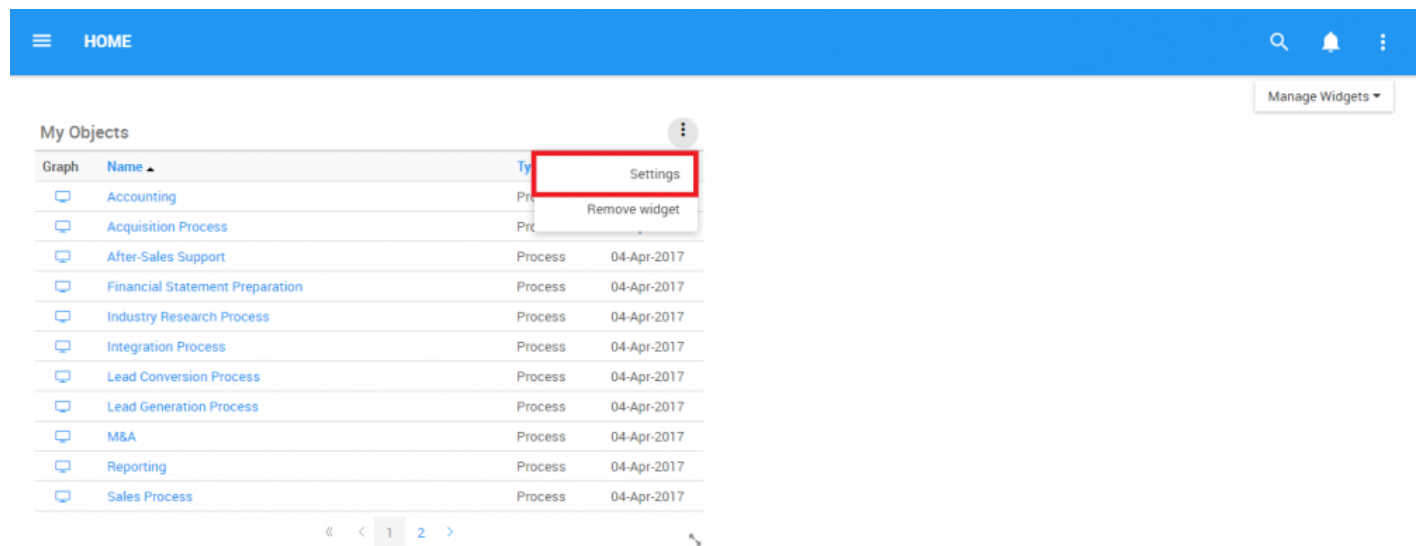
1. Upon login, you will be greeted with the following page:



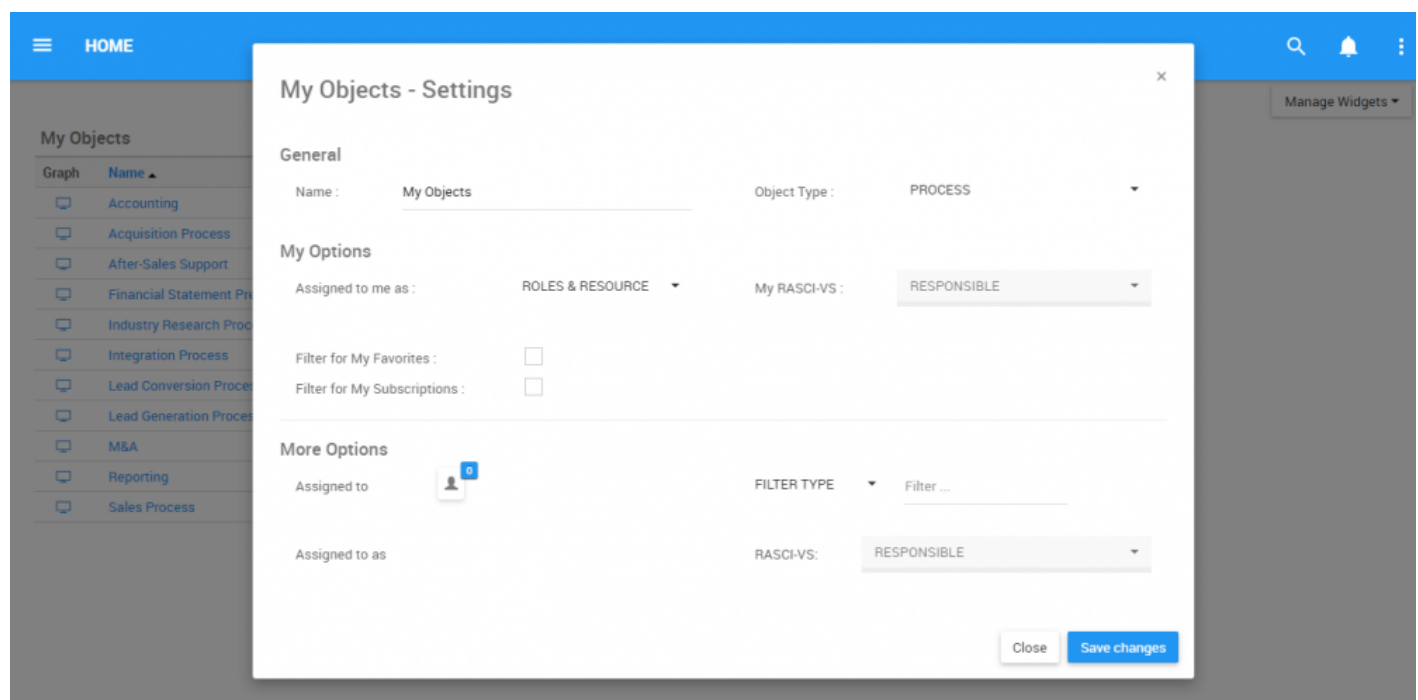
2. To add widgets to your home page, next you navigate to the “Manage Widgets” and add the “My Objects” Widget. (Please see How to add Widgets from Home page above for further detail).

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  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.

My Objects - Settings

General

A Name : My Objects **B** Object Type : PROCESS

My Options

C Assigned to me as : ROLES & RESOURCE **D** My RASCI-VS : RESPONSIBLE

E Filter for My Favorites : ☐

F Filter for My Subscriptions : ☐

More Options

G Assigned to **H** Assigned to as

FILTER TYPE Filter ...

RASCI-VS: RESPONSIBLE

Close Save changes

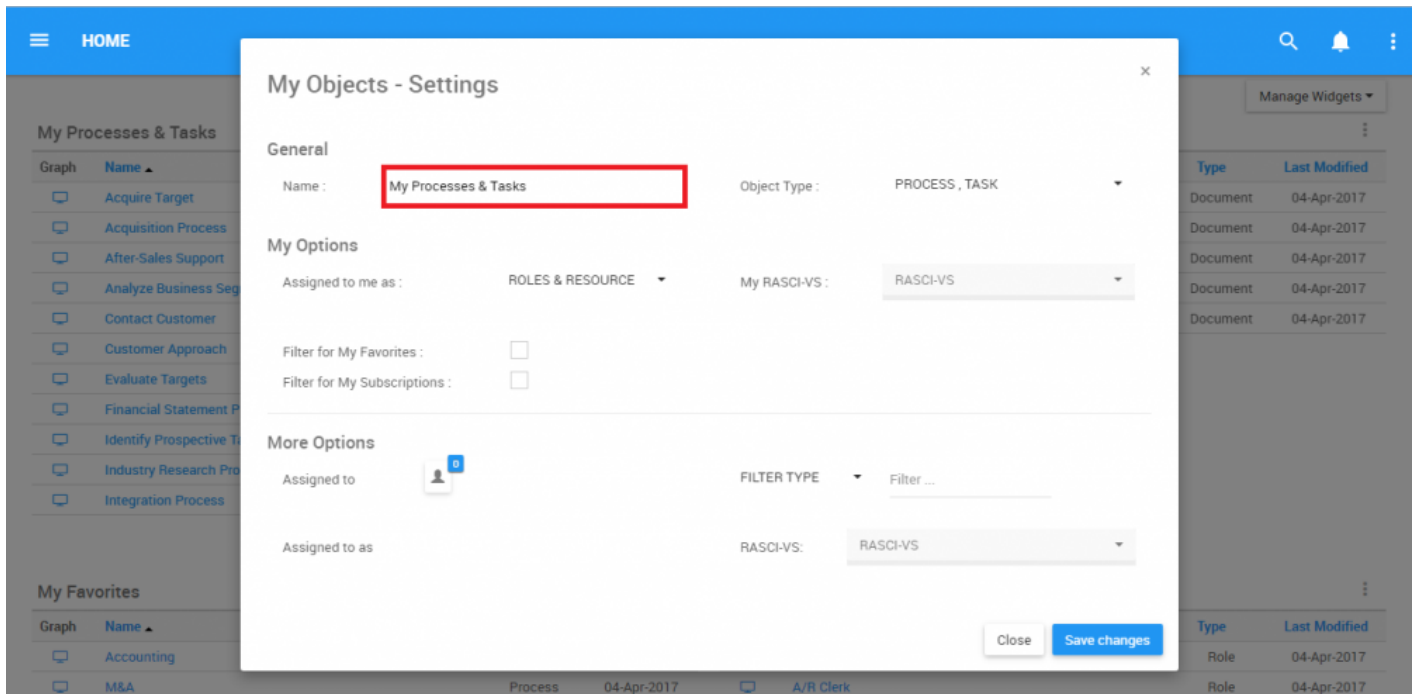
Item	Setting	Purpose
A	Name	Allow user to customize the title of the Widget.
B	Object Type	The primary filter of the “My Objects”. Allow users to select a specific object type to be featured.
C	Assigned to me as	Allow users to filter through their assigned Roles and Resources.
D	My RASCI-VS	Allow users 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.

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

My Objects - Settings

General

Name : My Processes & Tasks Object Type : PROCESS, TASK

My Options

Assigned to me as : ROLES & RESOURCE My RASCI-VS : RASCI-VS

Filter for My Favorites : ☐

Filter for My Subscriptions : ☐

More Options

Assigned to FILTER TYPE Filter ...

Assigned to as RASCI-VS: RASCI-VS

Close Save changes

My Processes & Tasks

Graph	Name
	Acquire Target
	Acquisition Process
	After-Sales Support
	Analyze Business Seg
	Contact Customer
	Customer Approach
	Evaluate Targets
	Financial Statement P
	Identify Prospective T
	Industry Research Pro
	Integration Process

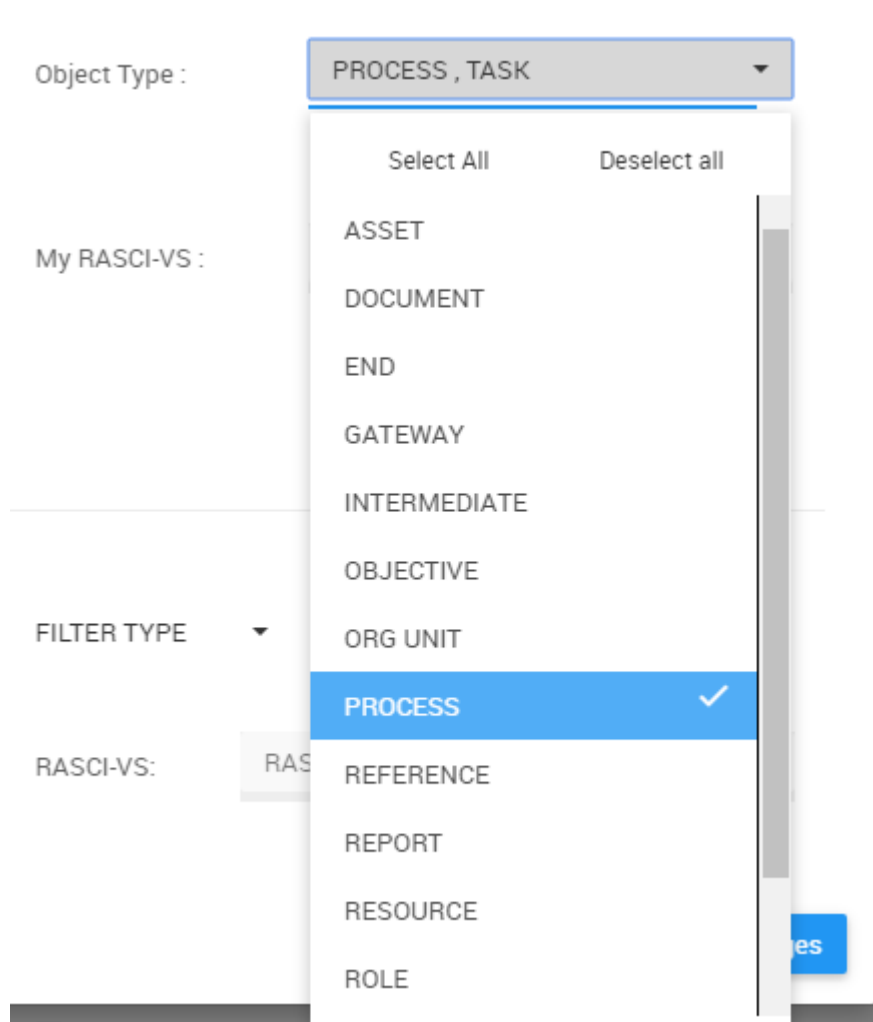
My Favorites

Graph	Name
	Accounting
	M&A

Process 04-Apr-2017 A/R Clerk

Type	Last Modified
Document	04-Apr-2017
Document	04-Apr-2017
Document	04-Apr-2017
Document	04-Apr-2017
Document	04-Apr-2017
Role	04-Apr-2017
Role	04-Apr-2017

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 buttons that can be used for mass selection.

Select All

Deselect all

and



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.

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:

My Objects - Settings ×

General

Name : Object Type :


My Options

Assigned to me as : ROLES & RESOURCE My RASCI-VS :

Filter for My Favorites : ☐

Filter for My Subscriptions : ☐

More Options

Assigned to 

Assigned to as

FILTER TYPE

RASCI-VS:

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).

My Options

Assigned to me as :

ROLES & RESOURCE ▼

Select All

Deselect all

ACQUISITION SPECIALIST

SALES DIRECTOR

TIM SHAW

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

My Options

Assigned to me as :

ROLES & RESOURCE ▼

Select All

Deselect all

ACQUISITION SPECIALIST

SALES DIRECTOR

TIM SHAW

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

My Options

Assigned to me as :

SALES DIRECTOR ▼

Select All	Deselect all
ACQUISITION SPECIALIST	
SALES DIRECTOR ✓	
TIM SHAW	

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

My Options

Assigned to me as :

ACQUISITION SPECIALIST ▼

Select All	Deselect all
ACQUISITION SPECIALIST ✓	
SALES DIRECTOR ✓	
TIM SHAW	

✿ 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

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.

My RASCI-VS : RESPONSIBLE, ACCOUNTABLE, SUF ▼

Select All	Deselect all
RESPONSIBLE	✓
ACCOUNTABLE	✓
SUPPORT	✓
CONSULTED	
INFORMED	
VERIFIER	
SIGNATORY	

* 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

My Objects - Settings ×

General

Name : Object Type :


My Options

Assigned to me as : My RASCI-VS :

Filter for My Favorites : ☒

Filter for My Subscriptions : ☐

More Options

Assigned to  FILTER TYPE ▼

Assigned to as RASCI-VS:

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

Filter for My Favorites : ☒

Filter for My Subscriptions : ☐

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

My Objects - Settings

✕

General

Name : My Processes & Tasks

Object Type : ASSET , DOCUMENT , END , GATEW ▼

My Options

Assigned to me as : ROLES & RESOURCE ▼

My RASCI-VS : RASCI-VS ▼

Filter for My Favorites :

☐

Filter for My Subscriptions :

☐

More Options

Assigned to



FILTER TYPE ▼ Filter ...

Assigned to as

RASCI-VS: RASCI-VS ▼

Close

Save changes

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

Filter for My Favorites :

☐

Filter for My Subscriptions :



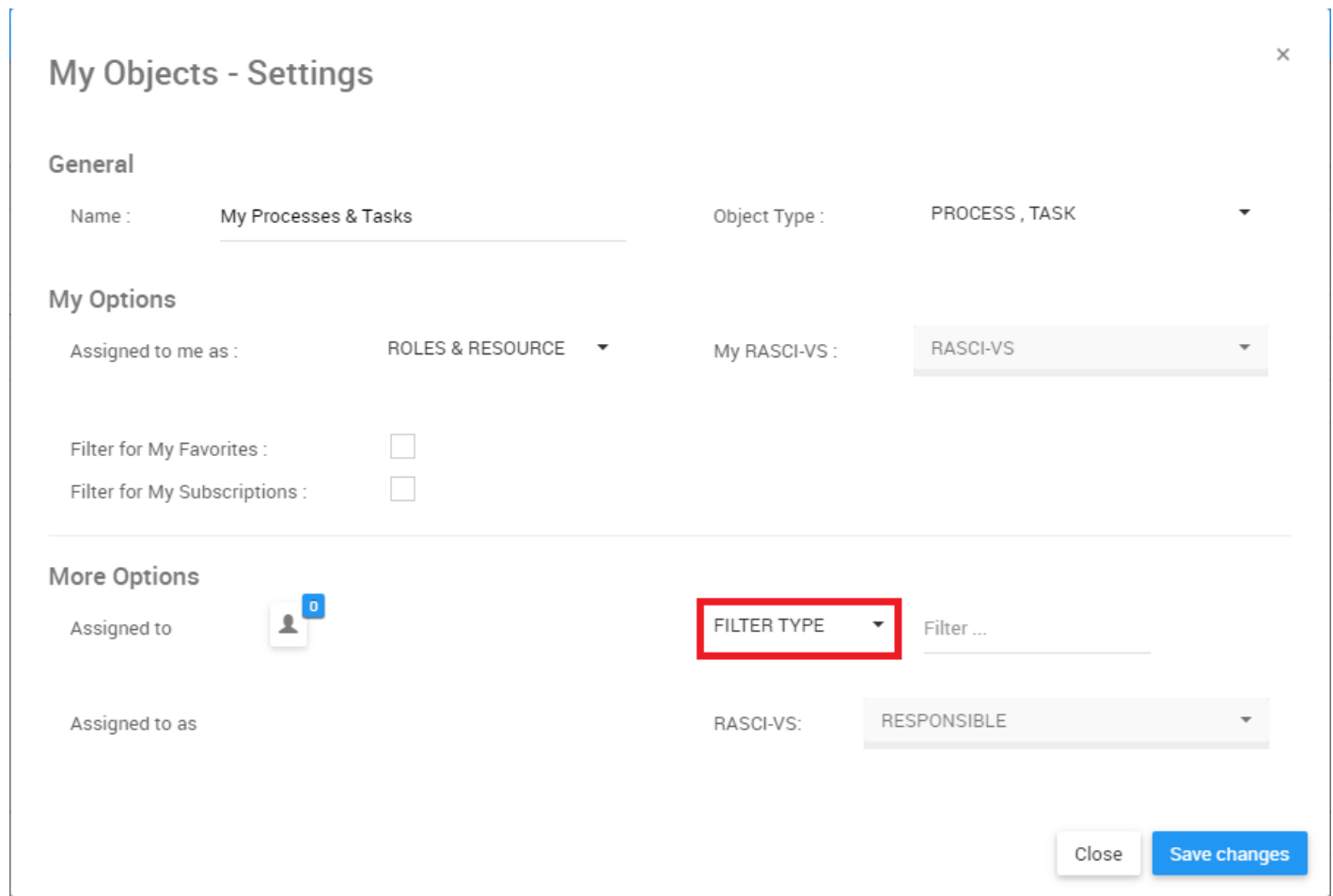
G. Assigned to: This filter is designed for users to view Objects that are associated with specific Roles and Resources. This allows users to see which objects relate to different people and roles within the organization.

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

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

i. Navigate to the My Objects – Settings page

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



My Objects - Settings

General

Name : My Processes & Tasks Object Type : PROCESS , TASK


My Options

Assigned to me as : ROLES & RESOURCE My RASCI-VS : RASCI-VS

Filter for My Favorites : ☐

Filter for My Subscriptions : ☐

More Options

Assigned to  **FILTER TYPE** Filter ...

Assigned to as RASCI-VS: RESPONSIBLE

Close Save changes

iii. A drop-down menu will be automatically generated



FILTER TYPE ▼

- ROLE
- RESOURCE
- ASSET
- ORG UNIT

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

ROLE, RESOURCE ▼

- ROLE ✓
- RESOURCE ✓
- ASSET
- ORG UNIT

v. Once the desired Objects have been selected, click anywhere outside 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

My Objects - Settings ×

General

Name : My Processes & Tasks Object Type : PROCESS , TASK ▼


My Options

Assigned to me as : ROLES & RESOURCE ▼ My RASCI-VS : RASCI-VS ▼

Filter for My Favorites : ☐

Filter for My Subscriptions : ☐

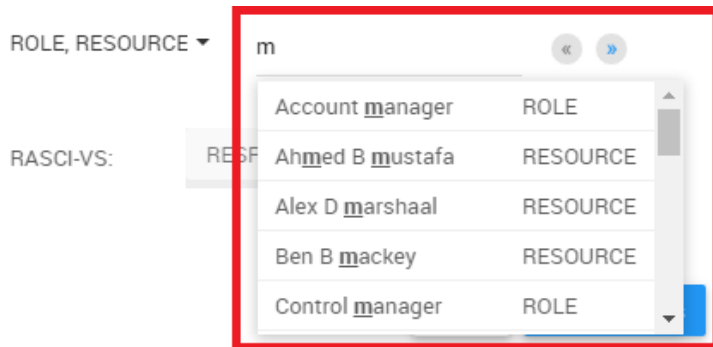
More Options



Assigned to  ROLE, RESOURCE ▼ Filter ...

Assigned to as RASCI-VS: RESPONSIBLE ▼


Close Save changes

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

My Objects - Settings



General

Name : My Processes & Tasks

Object Type : PROCESS , TASK

My Options

Assigned to me as : ROLES & RESOURCE

My RASCI-VS : RASCI-VS

Filter for My Favorites : ☐

Filter for My Subscriptions : ☐

More Options

Assigned to



ROLE, RESOURCE m

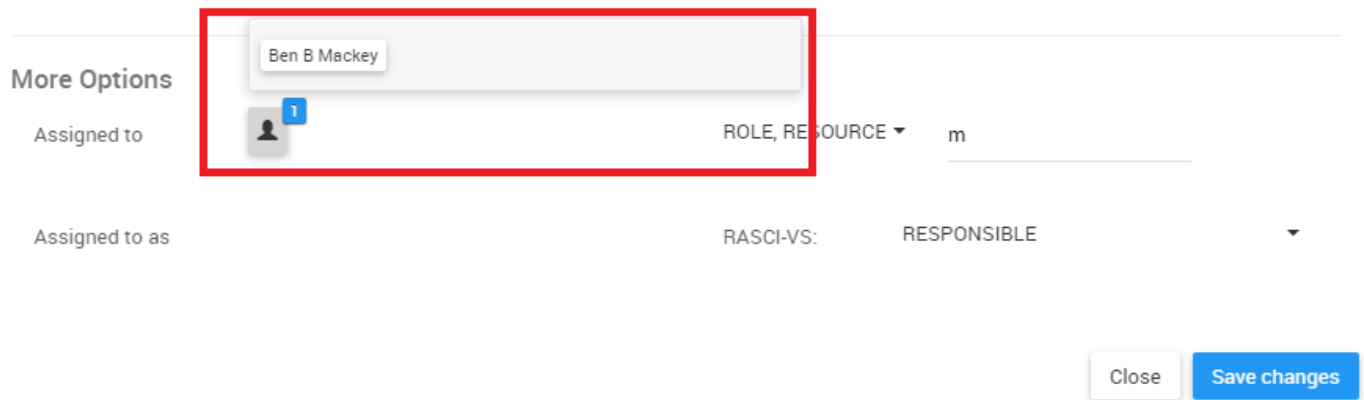
Assigned to as

RASCI-VS: RESPONSIBLE

Close

Save changes

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



More Options

Assigned to

Ben B Mackey

ROLE, RESOURCE ▼ m

Assigned to as

RASCI-VS: RESPONSIBLE ▼

Close Save changes

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

My Objects - Settings ×

General

Name : Object Type : PROCESS , TASK ▼


My Options

Assigned to me as : ROLES & RESOURCE ▼ My RASCI-VS : RASCI-VS ▼

Filter for My Favorites : ☐

Filter for My Subscriptions : ☐

More Options

Assigned to  ROLE, RESOURCE ▼

Assigned to as RASCI-VS: RESPONSIBLE ▼

Close Save changes

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

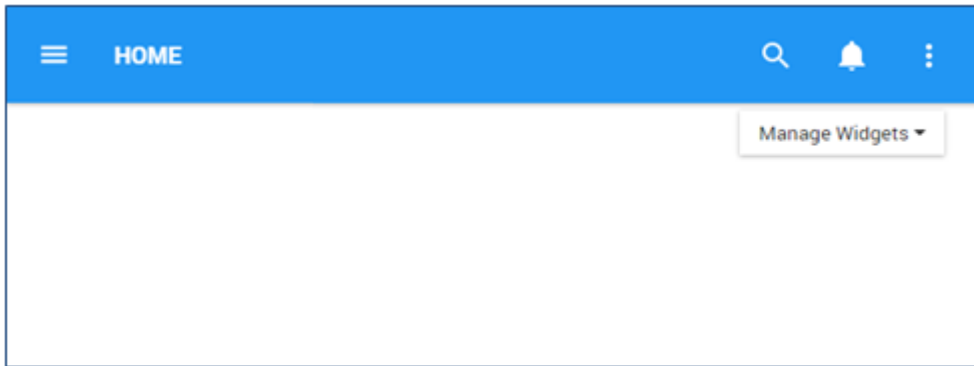
	Select All	Deselect all
My RASCI-VS :	<div><div>RESPONSIBLE ✓</div><div>ACCOUNTABLE</div><div>SUPPORT</div><div>CONSULTED</div><div>INFORMED</div><div>VERIFIER</div><div>SIGNATORY</div></div>	
ROLE, RESOURCE		
RASCI-VS:	<div>RESPONSIBLE ▲</div>	

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


4.2.1.4.3 Customize My Performance Widgets

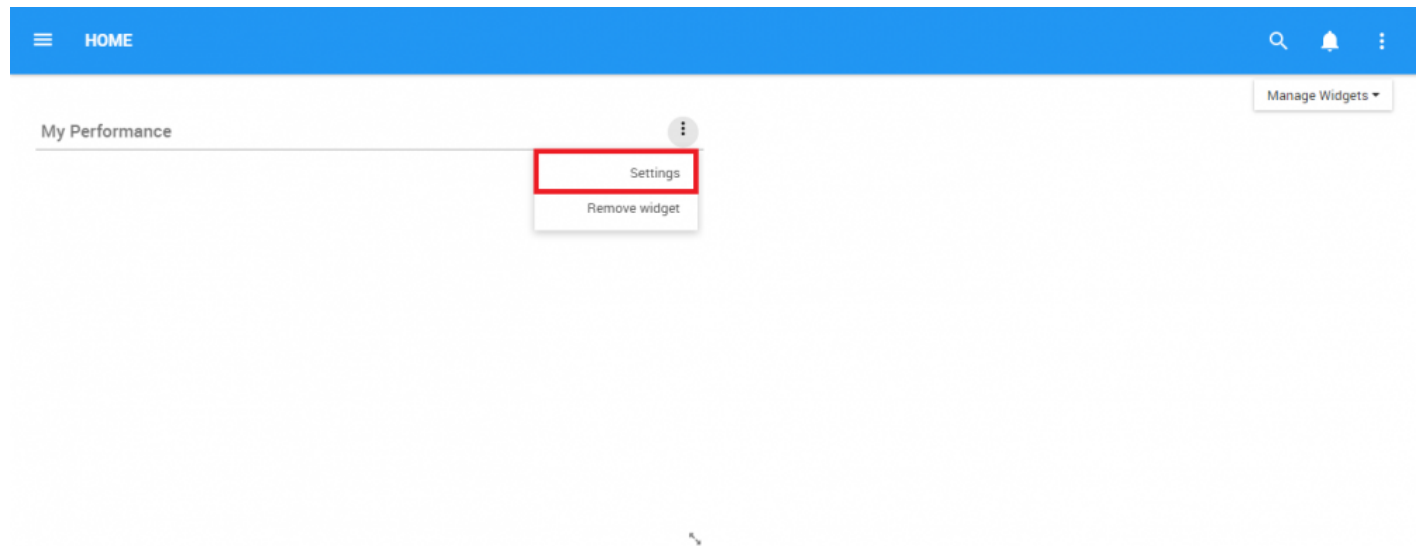
Customizing “My Performance” will allow users to prioritize key information related to their job responsibilities and performance. Please see the instructions below to customize the “My Performance” Widget.

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

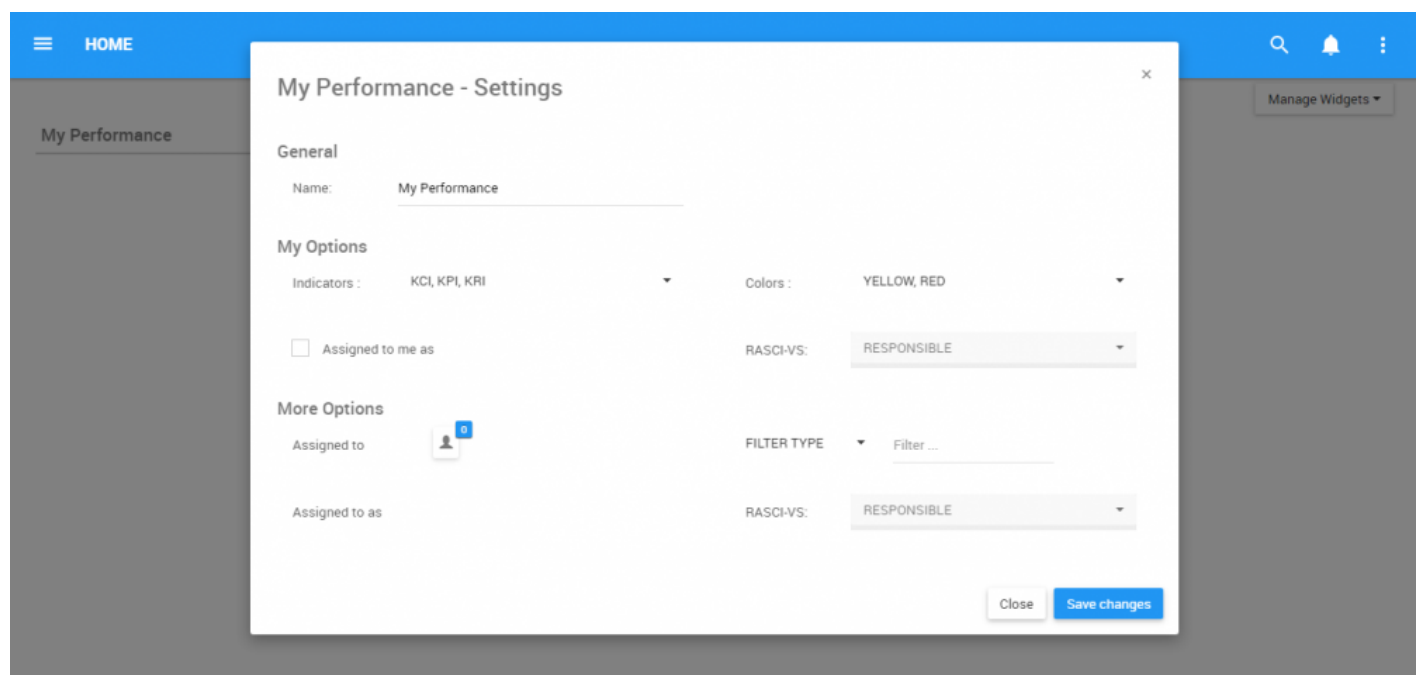


2. To add widgets to your home page, navigate to the “Manage Widgets” and add the “My Performance” Widget. (Please see **How to add Widgets from Home page** above for further detail).

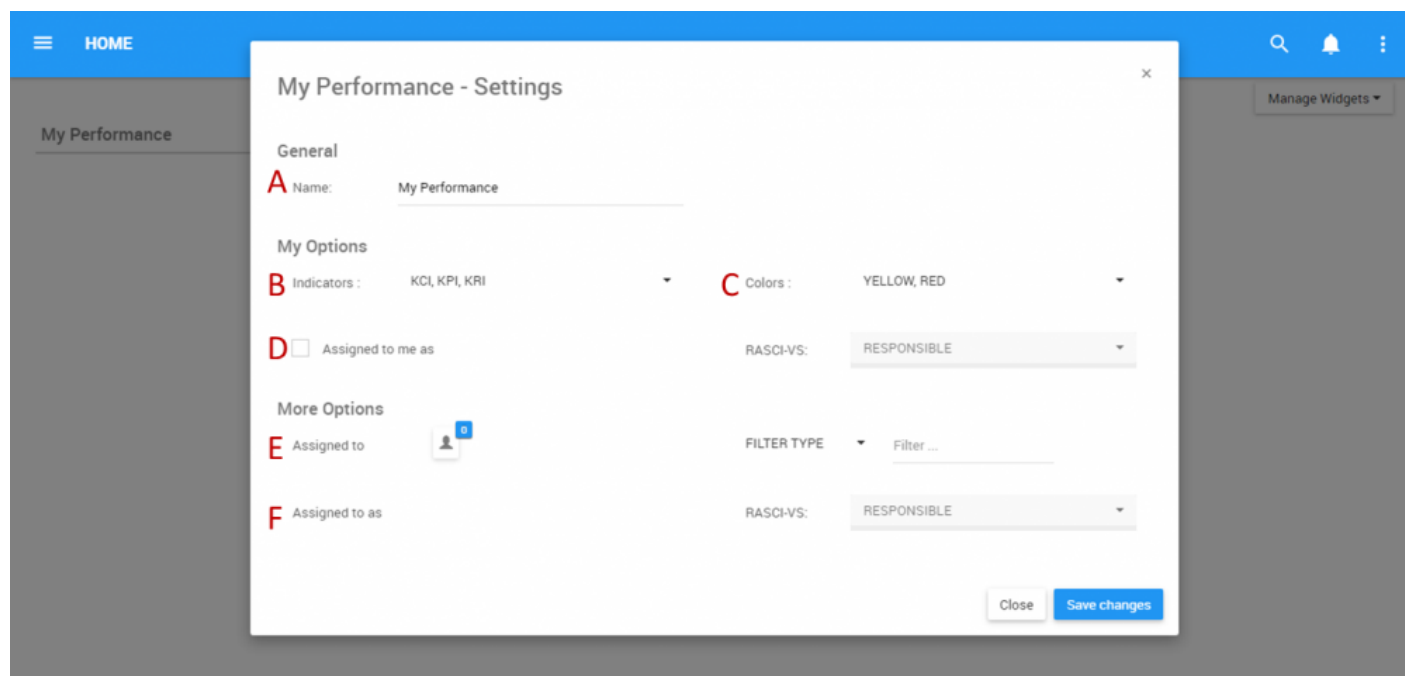
3. Once the “My Performance” Widget has been added to the Home page, select the  icon at the top right corner of the Widget and select the **Settings** button.



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.



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

My Performance - Settings

General

Name: My Performance

My Options

Indicators : KCI, KPI, KRI

Colors : YELLOW, RED

☐ Assigned to me as

RASCI-VS: RESPONSIBLE

More Options

Assigned to [User Icon] 8

Assigned to as

FILTER TYPE Filter ...

RASCI-VS: RESPONSIBLE

Close Save changes

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

My Performance - Settings



General

Name:

My Options

Indicators :

Colors :

☐ Assigned to me as

RASCI-VS:

More Options

Assigned to

FILTER TYPE

Assigned to as

RASCI-VS:

Close

Save changes

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

My Options

Indicators :

☐ Assigned to

More Options

Assigned to

- KCI ✓
- KPI ✓
- KRI ✓

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



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

My Performance - Settings ×

General

Name:


My Options

Indicators : ▼ Colors : ▼

☐ Assigned to me as

RASCI-VS: ▼

More Options

Assigned to  0

Assigned to as

FILTER TYPE ▼

RASCI-VS: ▼

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

Colors : YELLOW, RED

RASCI-VS:

FILTER TYPE

GREEN	
YELLOW	✓
RED	✓
NONE	

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.

My Performance - Settings ×

General

Name:

My Options


Indicators :

Colors :

☐ Assigned to me as

RASCI-VS:

More Options

Assigned to 

Assigned to as

FILTER TYPE

RASCI-VS:

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

My Performance - Settings



General

Name:

My Options

Indicators :

Colors :



Assigned to me as

RASCI-VS:

More Options

Assigned to

FILTER TYPE

Assigned to as

RASCI-VS:

Close

Save changes

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

My Performance - Settings

General

Name:


My Options

Indicators :

Colors :

Assigned to me as

More Options

Assigned to 

Assigned to as

FILTER TYPE

RASCI-VS:

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

RASCI-VS:

FILTER TYPE

RASCI-VS:

RESPONSIBLE ✓

ACCOUNTABLE

SUPPORT

CONSULTED

INFORMED

VERIFIER

SIGNATORY

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

My Performance - Settings ×

General

Name:

My Options


Indicators :

Colors :

☐ Assigned to me as

RASCI-VS:

More Options

Assigned to 

FILTER TYPE

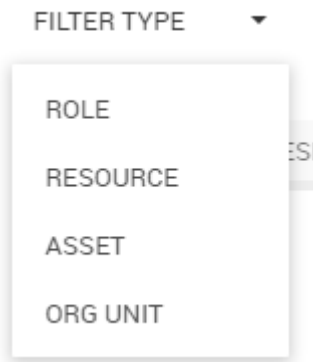
Assigned to as

RASCI-VS:

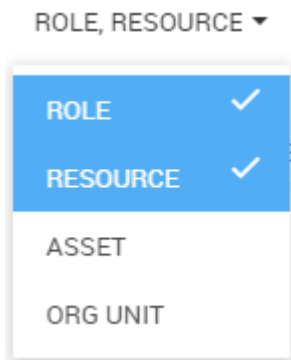
Close

Save changes

iii. A drop-down menu will be automatically generated



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



v. Once the desired items have been selected, click anywhere outside 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

My Performance - Settings

General

Name:

My Performance

My Options

Indicators :

KCI, KPI, KRI

Colors :

YELLOW, RED

Assigned to me as

RASCI-VS: RESPONSIBLE

More Options

Assigned to

0

FILTER TYPE

Filter ...

Assigned to as

RASCI-VS: RESPONSIBLE

Close

Save changes

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.

ROLE, RESOURCE

RASCI-VS: RESF

m

Account manager

ROLE

Ahmed B mustafa

RESOURCE

Alex D marshaal

RESOURCE

Ben B mackey

RESOURCE

Control manager


ROLE

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 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

My Performance - Settings ×

General

Name:

My Options

Indicators :

Colors :

☐ Assigned to me as

RASCI-VS:

More Options

Assigned to



ROLE, RESOURCE ▼

Assigned to as

RASCI-VS:

Close

Save changes

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

- 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

My Performance - Settings ×

General

Name:

My Options

Indicators :

Colors :

☐ Assigned to me as

RASCI-VS:

More Options

Assigned to 

ROLE, RESOURCE ▼

Assigned to as

RASCI-VS:

Close

Save changes

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

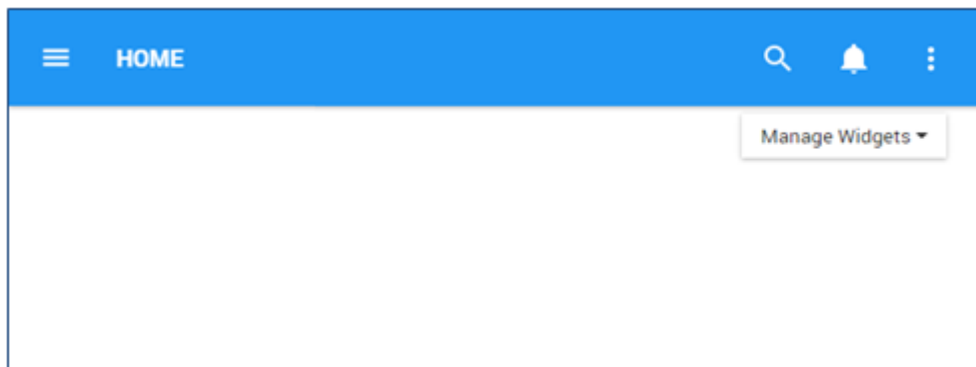
	Select All	Deselect all
My RASCI-VS :	<div><div>RESPONSIBLE ✓</div><div>ACCOUNTABLE</div><div>SUPPORT</div><div>CONSULTED</div><div>INFORMED</div><div>VERIFIER</div><div>SIGNATORY</div></div>	
ROLE, RESOURCE		
RASCI-VS:	<div>RESPONSIBLE ▲</div>	

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



4.2.1.4.4 Customize My Actions Widgets

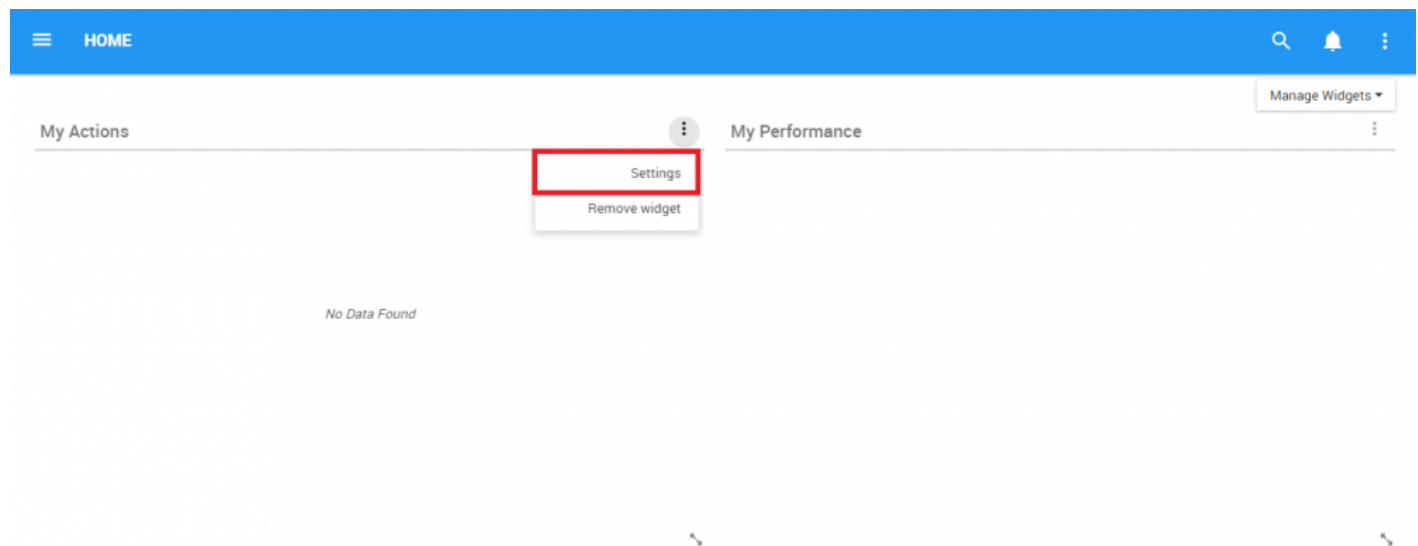
Customizing “My Actions” will allow users to view multiple different actions a user must perform in one or multiple Widget windows based on personal preference. Please follow the instructions below to customize the “My Actions” Widget.

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

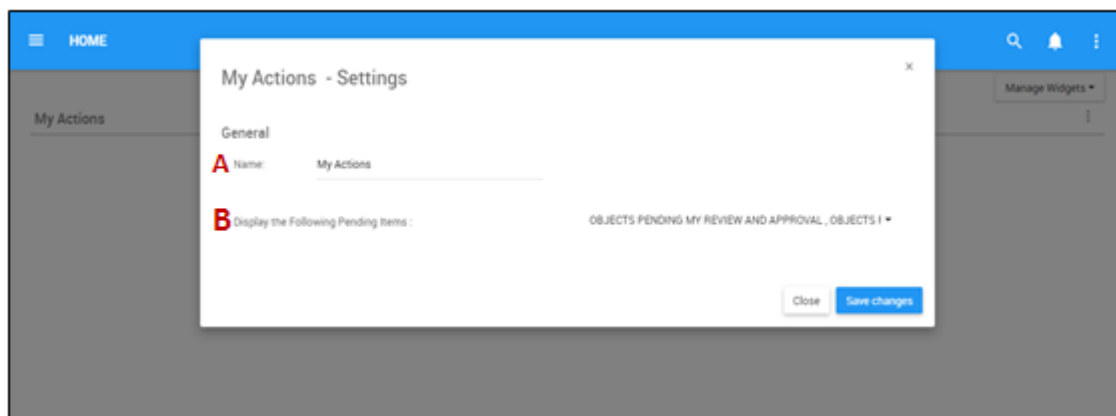


2. To add widgets to your home page, next you navigate to the “Manage Widgets” and add the “My Performance” Widget. (Please see **How to add Widgets from Home page** above for further detail).

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  button.



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



My Actions - Settings ×

General

Name:

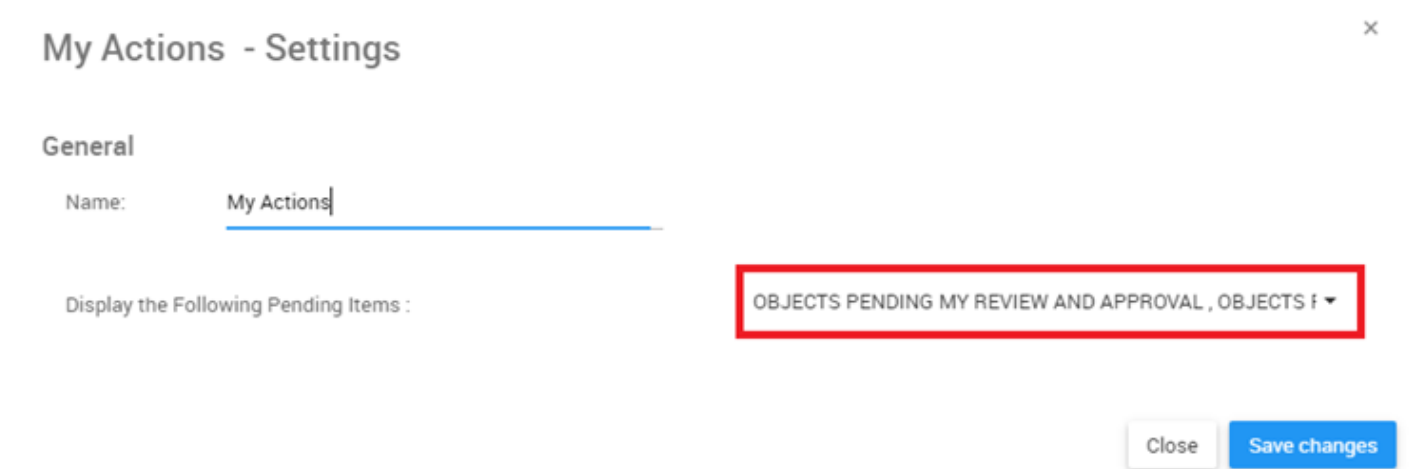
Display the Following Pending Items : OBJECTS PENDING MY REVIEW AND APPROVAL , OBJECTS F ▼

Close Save changes

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



My Actions - Settings ×

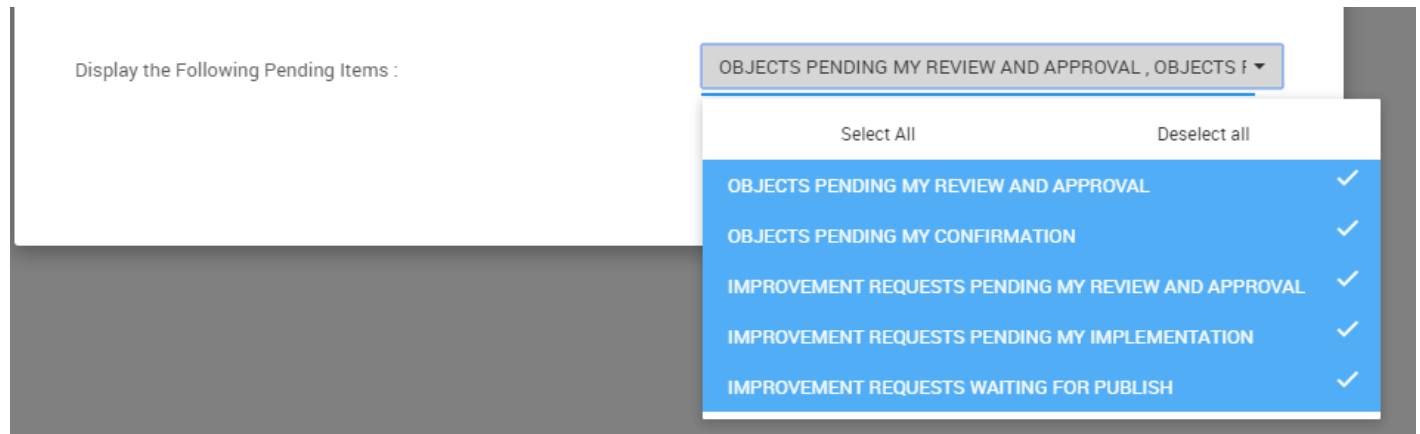
General

Name:


Display the Following Pending Items : OBJECTS PENDING MY REVIEW AND APPROVAL , OBJECTS F ▼

Close Save changes

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 buttons that can be used for mass selection.

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

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.

Object Type : DOCUMENT , PROCESS , ROLE ▼

Select All

Deselect all

ASSET

DOCUMENT ✓

END

GATEWAY

INTERMEDIATE

OBJECTIVE

ORG UNIT

PROCESS ✓

REPORT

RESOURCE

ROLE ✓

START

TASK

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.

My Objects



Graph	Name ▲	Type	Last Modified
	A/P Clerk	Role	04-Apr-2017
	A/R Clerk	Role	04-Apr-2017
	Account Manager	Role	04-Apr-2017
	Accounting	Process	04-Apr-2017
	Accounting Director	Role	04-Apr-2017
	Acquisition Model #1	Document	11-Apr-2017
	Acquisition Model #2	Document	11-Apr-2017
	Acquisition Model #3	Document	11-Apr-2017
	Acquisition Model #4	Document	11-Apr-2017
	Acquisition Model #5	Document	11-Apr-2017
	Acquisition Model #6	Document	11-Apr-2017

« < 1 2 >



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.

Object Type : DOCUMENT , PROCESS , ROLE ▼

Select All

Deselect all

ASSET

DOCUMENT ✓

END

GATEWAY

INTERMEDIATE

OBJECTIVE

ORG UNIT

PROCESS ✓

REPORT

RESOURCE

ROLE ✓

START

TASK

If a user simply applied this filter, the Widget would populate itself with 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

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

« < 1 > »



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.

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.

My Objects - Settings ×

General

Name : **1**

Object Type : PROCESS **2**

My Options

Assigned to me as : ROLES & RESOURCE ▼

My RASCI-VS : RESPONSIBLE ▼

Filter for My Favorites : ☐

3

Filter for My Subscriptions : ☐

More Options

Assigned to

FILTER TYPE ▼

Assigned to as

4

RASCI-VS: RESPONSIBLE ▼

	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.

My Performance - Settings



General

Name:

My Performance

1

My Options

Indicators :

KCI, KPI, KRI

2

Colors :

GREEN, YELLOW, RED, NONE

☐ Assigned to me as

RASCI-VS:

SELECT RASCI-VS

More Options

Assigned to

0

3

Assigned to as

FILTER TYPE

Filter ...

RASCI-VS:

SELECT RASCI-VS

Close

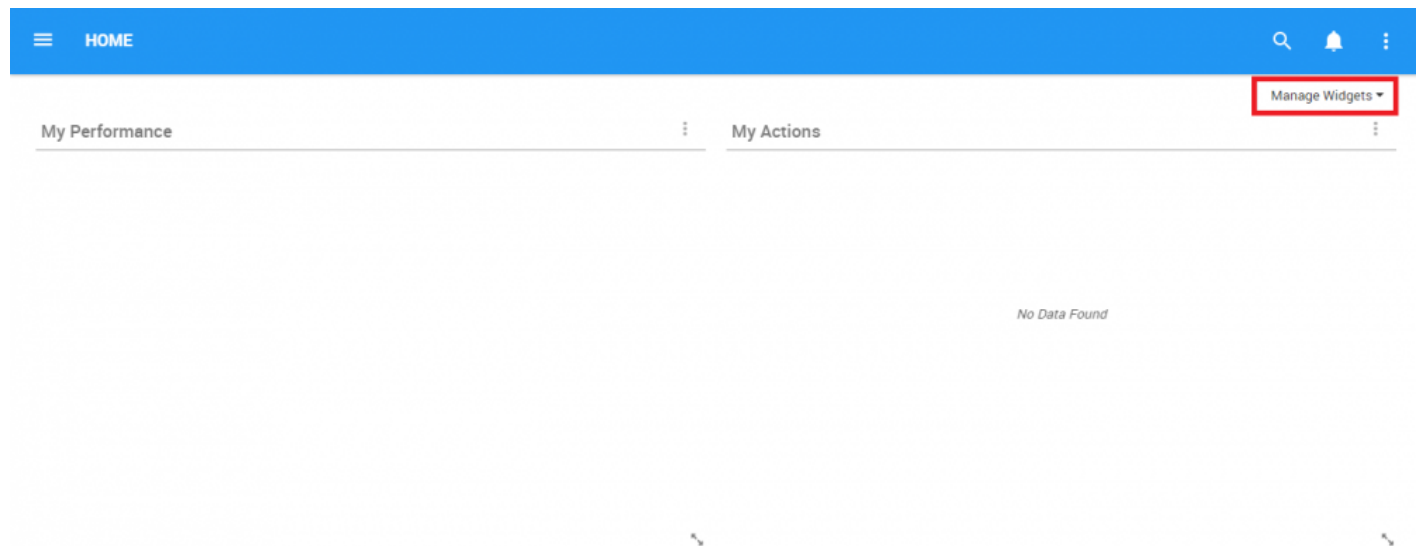
Save changes

	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.

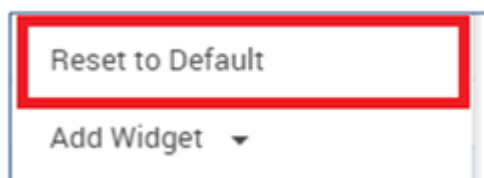
4.2.1.5 How to Reset Default Widgets

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.

4.2.1.6 How to Relocate Widgets within Home Page

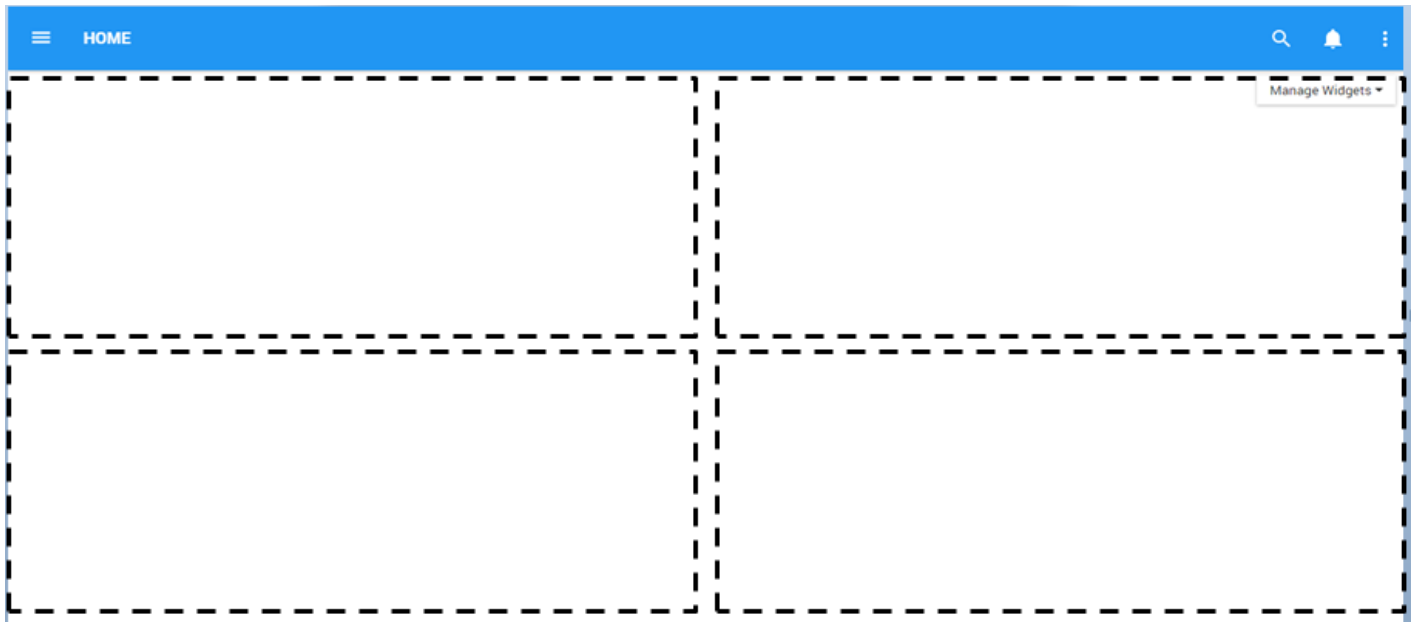
Users can customize the layout of their home page for an optimal interactive experience. Widgets can be moved in the home page, adjusted left, right or center, as well as resized to display more or fewer widgets on the user's home page. Here are the 3 main categories of layout options

- 1. [Default Widget Layout](#)*
- 2. [Centralized Widget Layout](#)*
- 3. [Resized Widget Layout](#)*

4.2.1.6.1 Layout Options

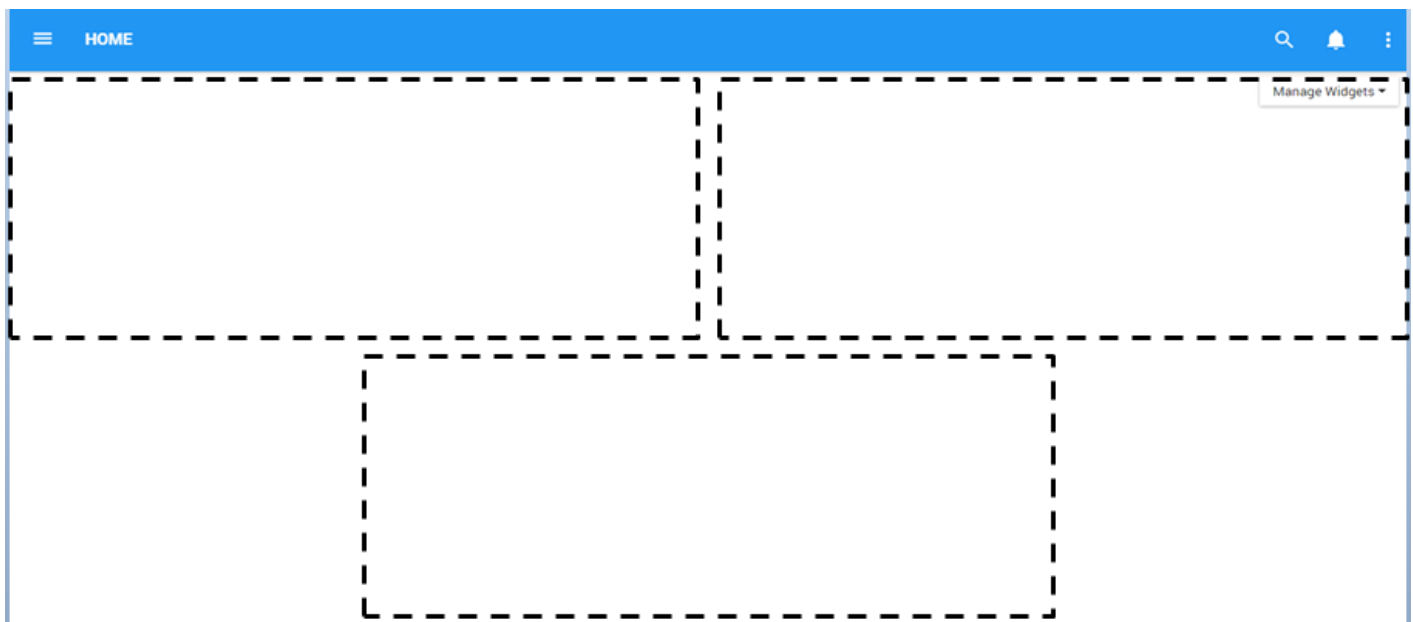
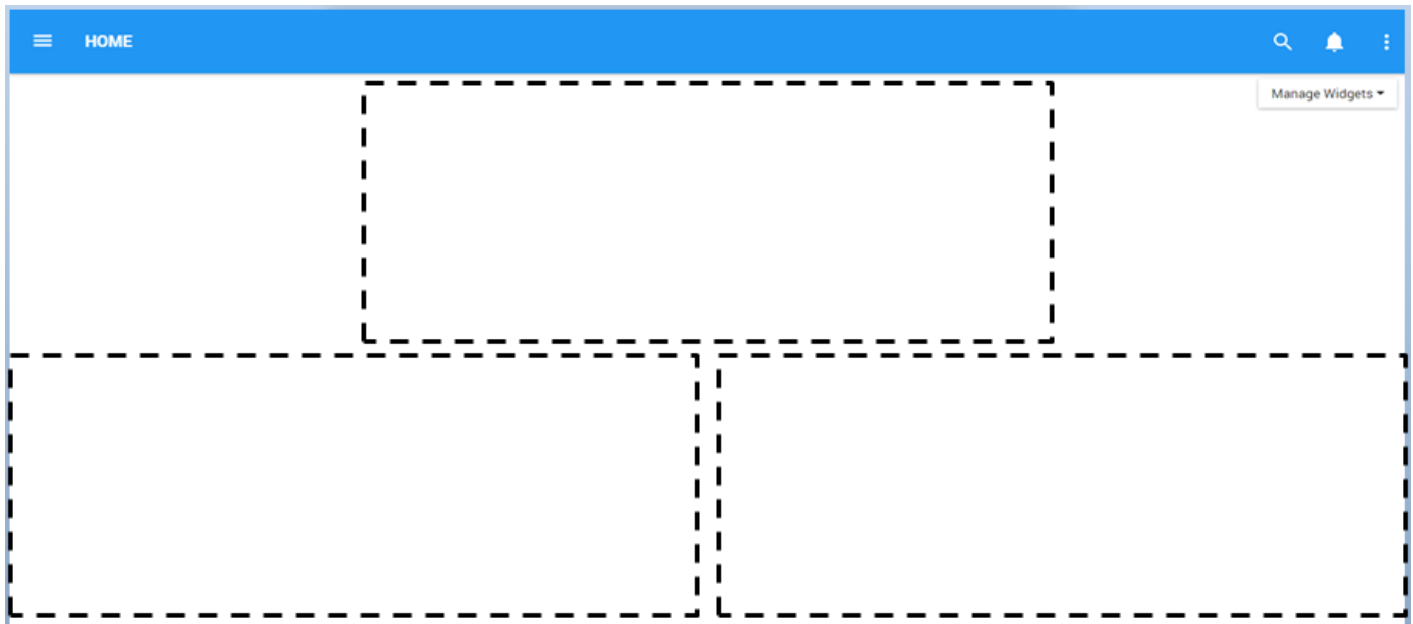
Default Widget Layout

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



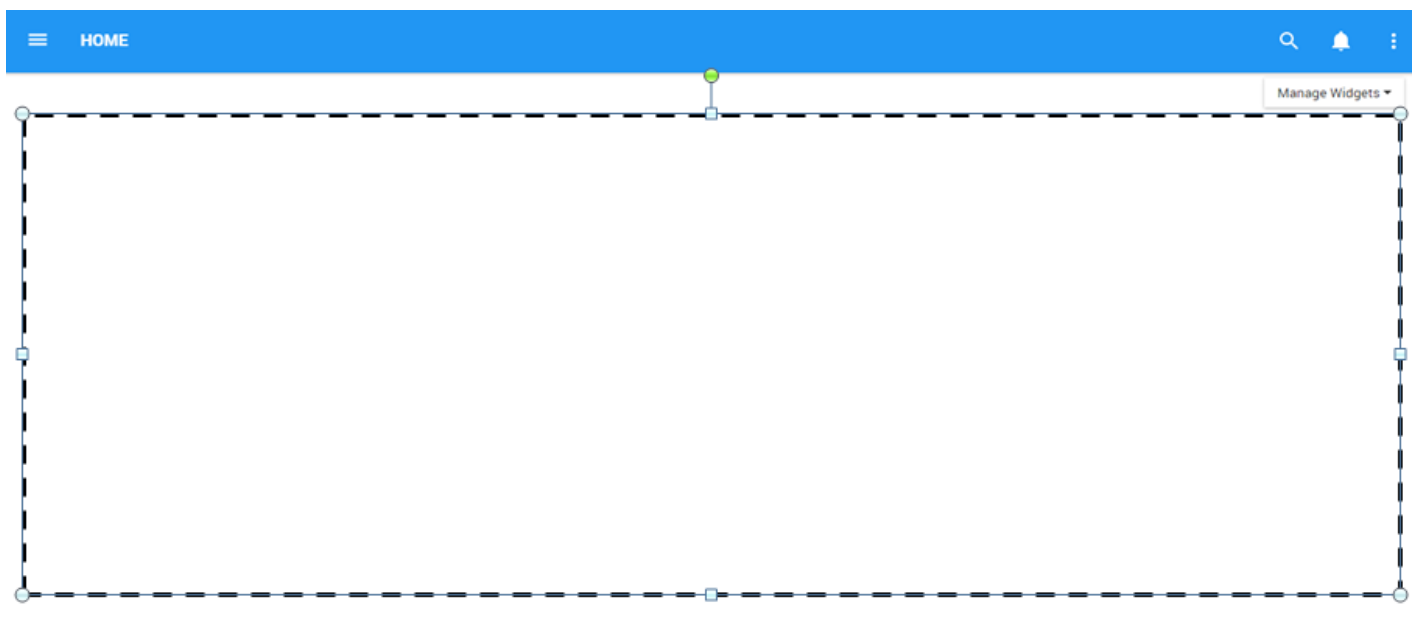
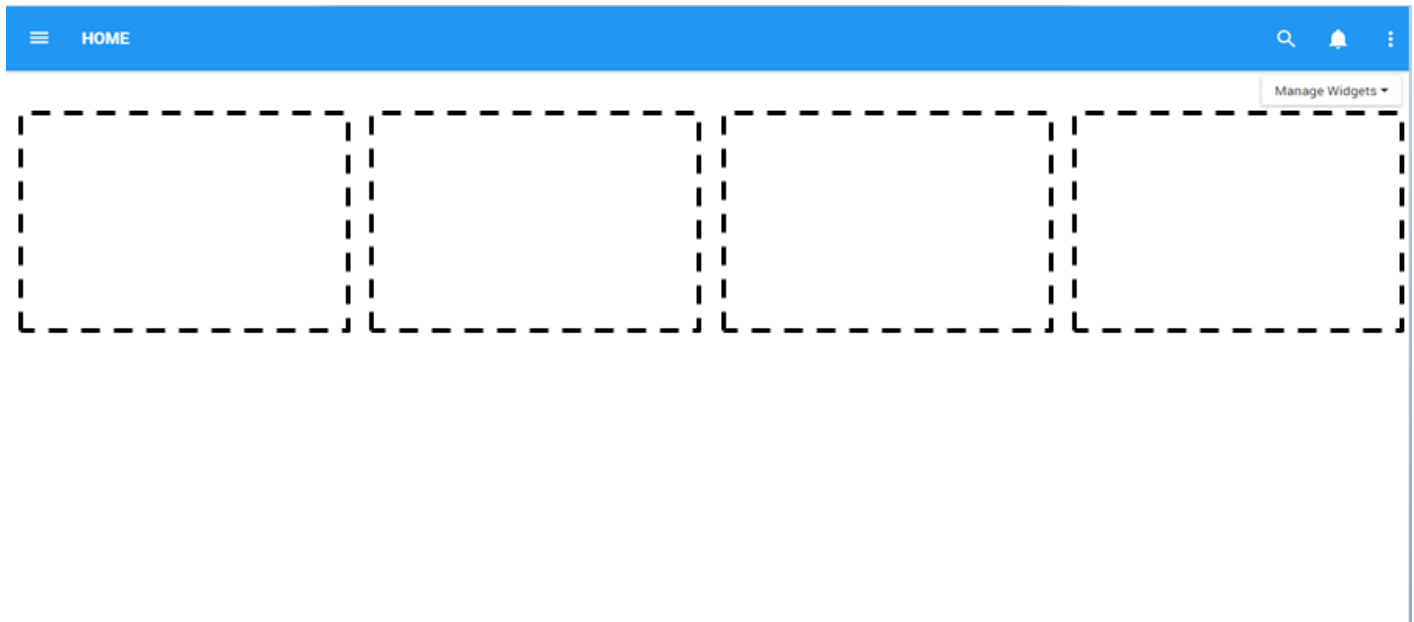
Centralized Widget Layout


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.



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.



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.

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

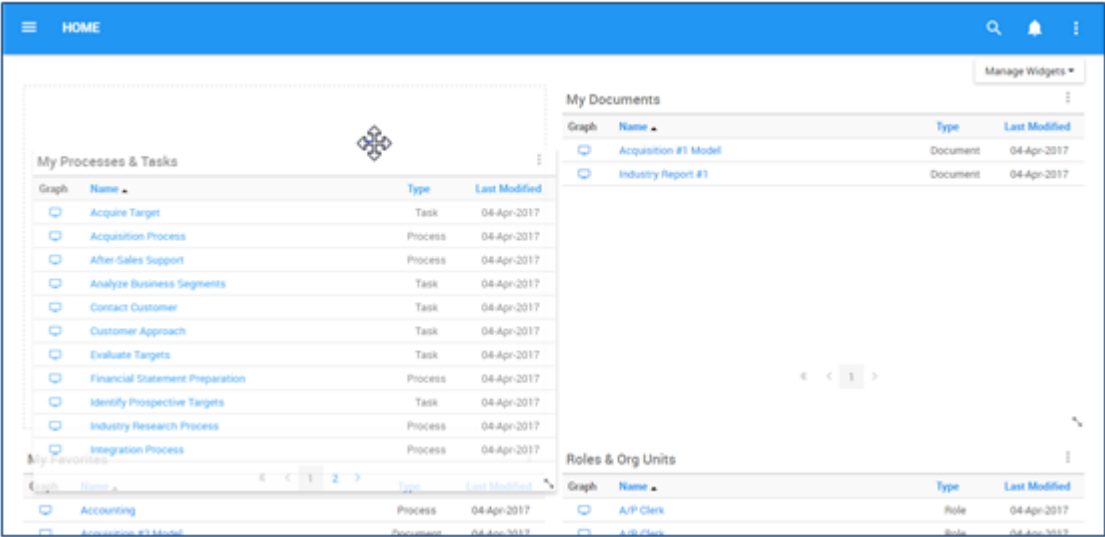
⏪ < 1 > ⏩

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

HOME

My Processes & Tasks

Graph	Name	Type	Last Modified
Acquire Target		Task	04-Apr-2017
Acquisition Process		Process	04-Apr-2017
After-Sales Support		Process	04-Apr-2017
Analyze Business Segments		Task	04-Apr-2017
Contact Customer		Task	04-Apr-2017
Customer Approach		Task	04-Apr-2017
Evaluate Targets		Task	04-Apr-2017
Financial Statement Preparation		Process	04-Apr-2017
Identify Prospective Targets		Task	04-Apr-2017
Industry Research Process		Process	04-Apr-2017
Integration Process		Process	04-Apr-2017

My Documents

Graph	Name	Type	Last Modified
Acquisition #1 Model		Document	04-Apr-2017
Industry Report #1		Document	04-Apr-2017

My Favorites

Graph	Name	Type	Last Modified
Accounting		Process	04-Apr-2017
Acquisition #2 Model		Document	04-Apr-2017

Roles & Org Units

Graph	Name	Type	Last Modified
A/P Clerk		Role	04-Apr-2017
A/R Clerk		Role	04-Apr-2017

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.

HOME

My Documents


Graph	Name	Type	Last Modified
Acquisition #1 Model		Document	04-Apr-2017
Industry Report #1		Document	04-Apr-2017

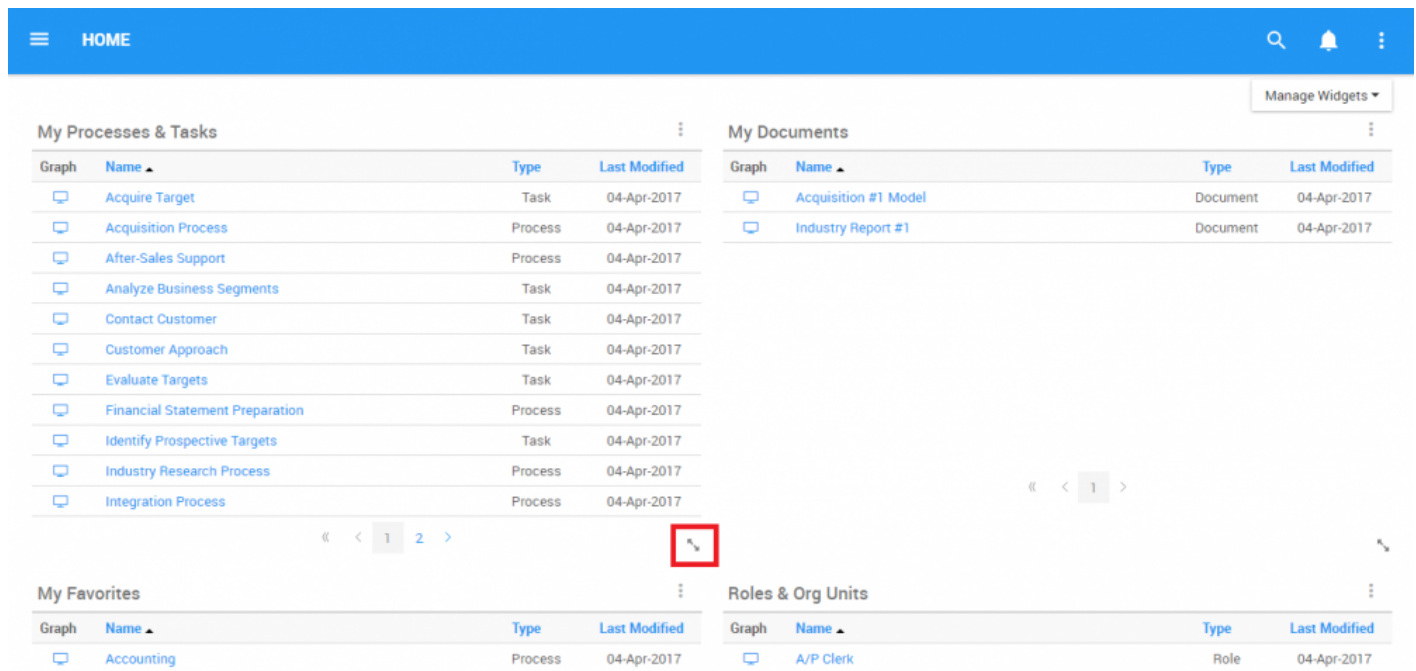
My Processes & Tasks

Graph	Name	Type	Last Modified
Acquire Target		Task	04-Apr-2017
Acquisition Process		Process	04-Apr-2017
After-Sales Support		Process	04-Apr-2017
Analyze Business Segments		Task	04-Apr-2017
Contact Customer		Task	04-Apr-2017
Customer Approach		Task	04-Apr-2017
Evaluate Targets		Task	04-Apr-2017
Financial Statement Preparation		Process	04-Apr-2017
Identify Prospective Targets		Task	04-Apr-2017
Industry Research Process		Process	04-Apr-2017
Integration Process		Process	04-Apr-2017

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



The screenshot shows the EPC10 WebApp Home page. At the top is a blue header with a menu icon, the word 'HOME', a search icon, a bell icon, and a 'Manage Widgets' dropdown. Below the header are four widget sections: 'My Processes & Tasks', 'My Documents', 'My Favorites', and 'Roles & Org Units'. Each section contains a table with columns for 'Graph', 'Name', 'Type', and 'Last Modified'. The 'My Processes & Tasks' widget has a list of 10 tasks. The 'My Documents' widget has a list of 2 documents. The 'My Favorites' widget has a list of 1 favorite. The 'Roles & Org Units' widget has a list of 1 role. A red box highlights the resize icon (a small square with a diagonal line) at the bottom right corner of the 'My Processes & Tasks' 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](#).

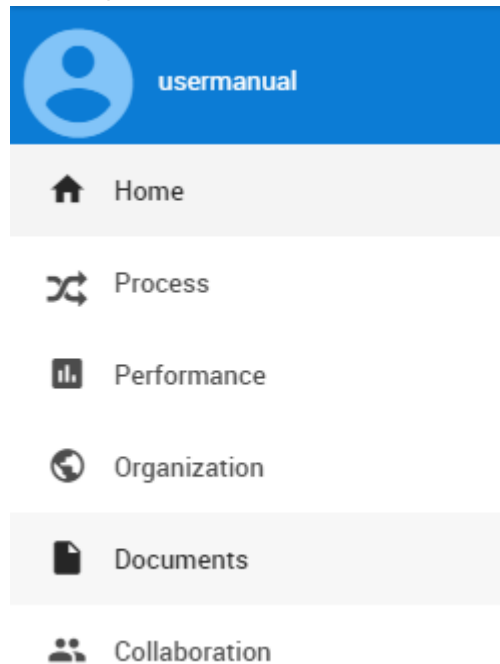


Mobile: Mobile layout will depend on the screen size on the smartphone or tablet being used. Users will be provided with a fixed layout, based on their mobile device that maximizes the use of the available screen space. This layout will be fixed.

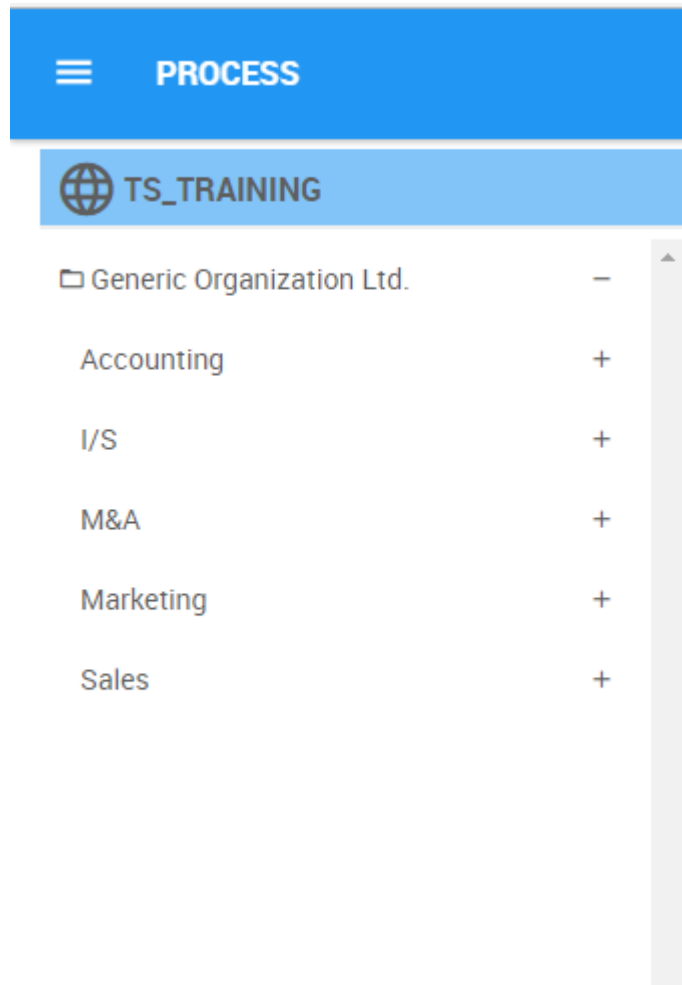
4.3 General Navigation

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



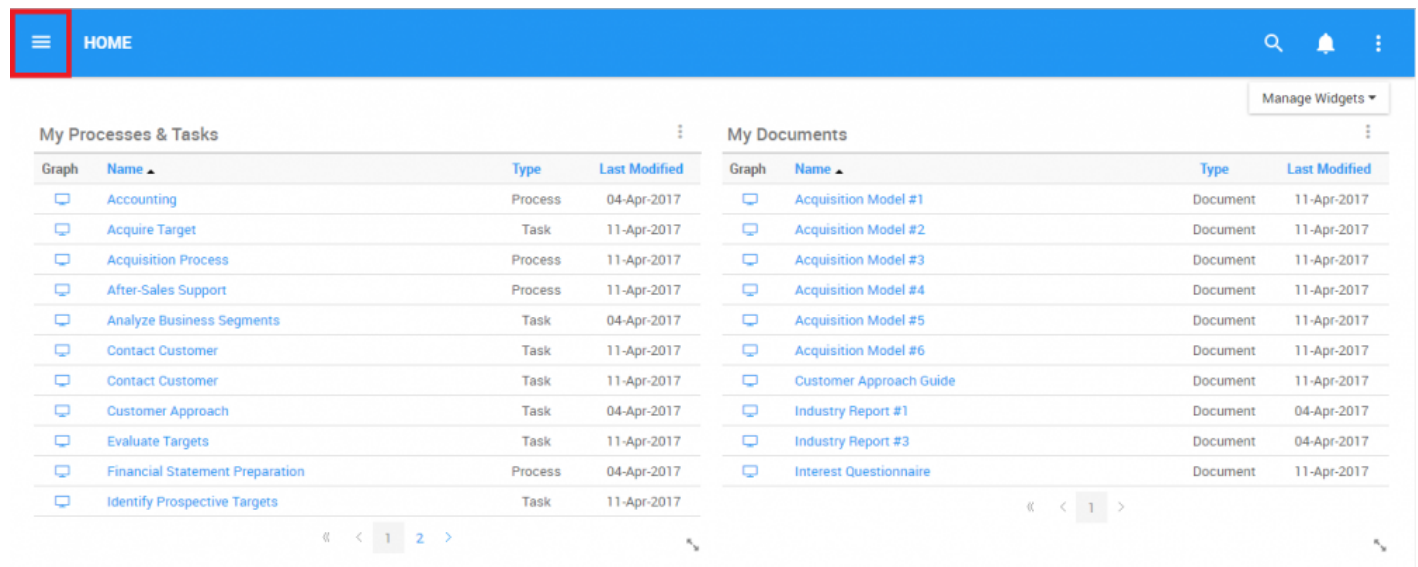
Both Items within the EPC follow a hierarchy format, allowing users to easily navigate between components of the EPC.

4.3.1 Navigation between Modules

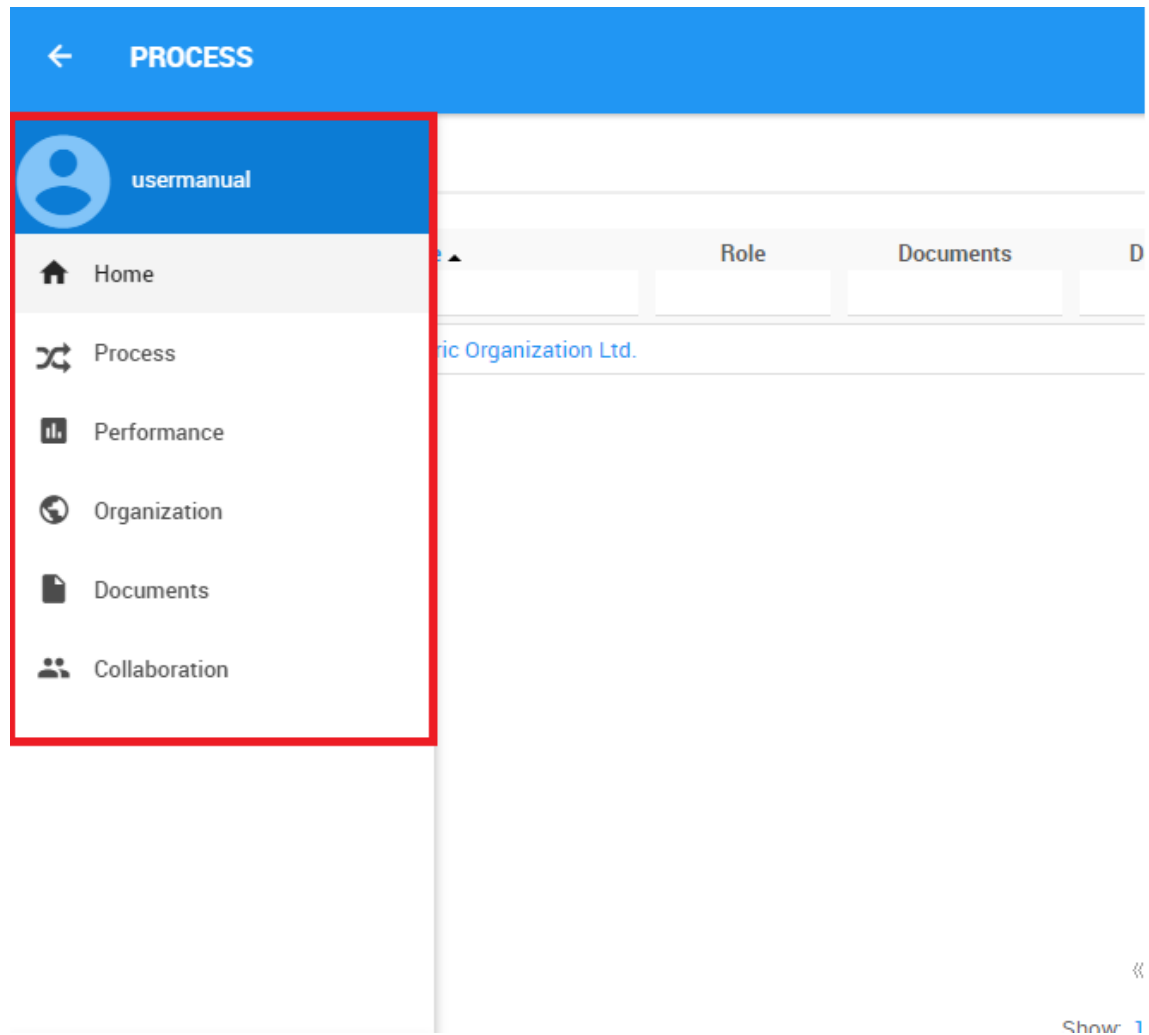
The Navigation Menu allows users to quickly navigate between EPC Modules.


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



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

The screenshot displays the EPC10 WebApp interface. At the top, a blue header bar contains a red square icon with a white left-pointing arrow and the word "PROCESS" in white capital letters. Below this, a blue sidebar menu is visible, featuring a user profile icon and the text "usermanual". The sidebar menu is open, showing a list of options: "Home" (with a house icon), "Process" (with a double-headed arrow icon), "Performance" (with a bar chart icon), "Organization" (with a globe icon), "Documents" (with a document icon), and "Collaboration" (with a group of people icon). The "Process" option is highlighted. In the background, a table is partially visible with columns labeled "Role", "Documents", and "D". The table contains one row with the text "ric Organization Ltd." under the "Role" column. At the bottom right of the page, there is a "Show: 1" button.

Role	Documents	D
ric Organization Ltd.		

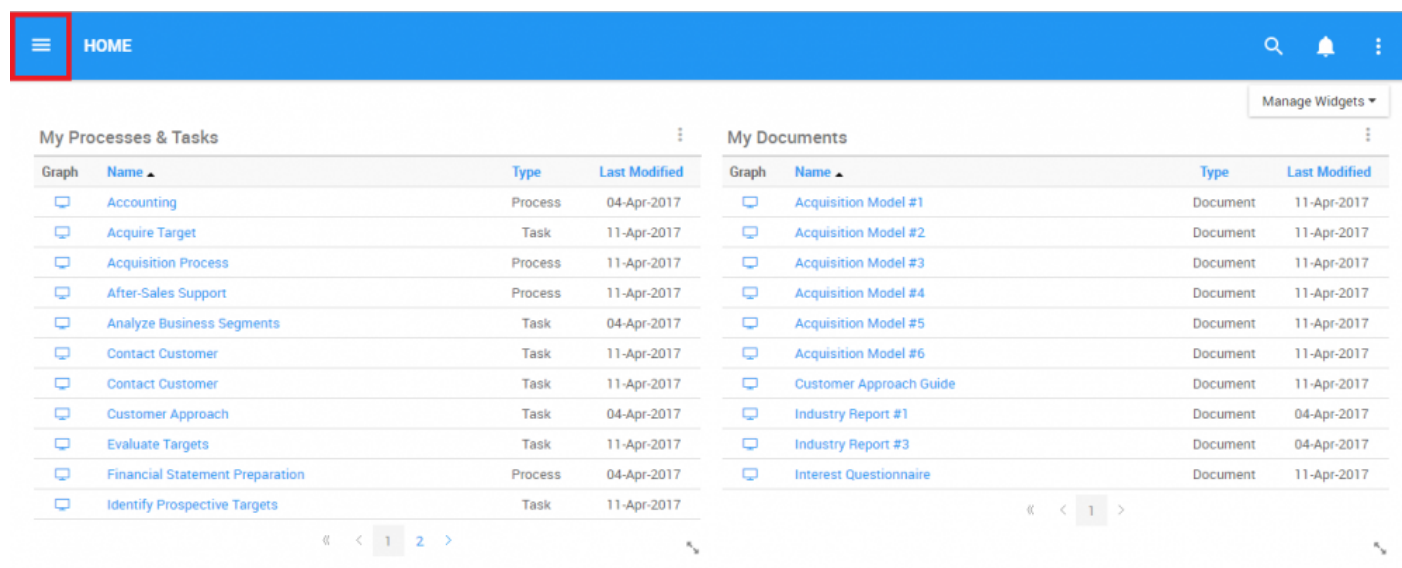
4.3.2 Navigation within a Module

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 in all modules mirrors the following instructions.

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

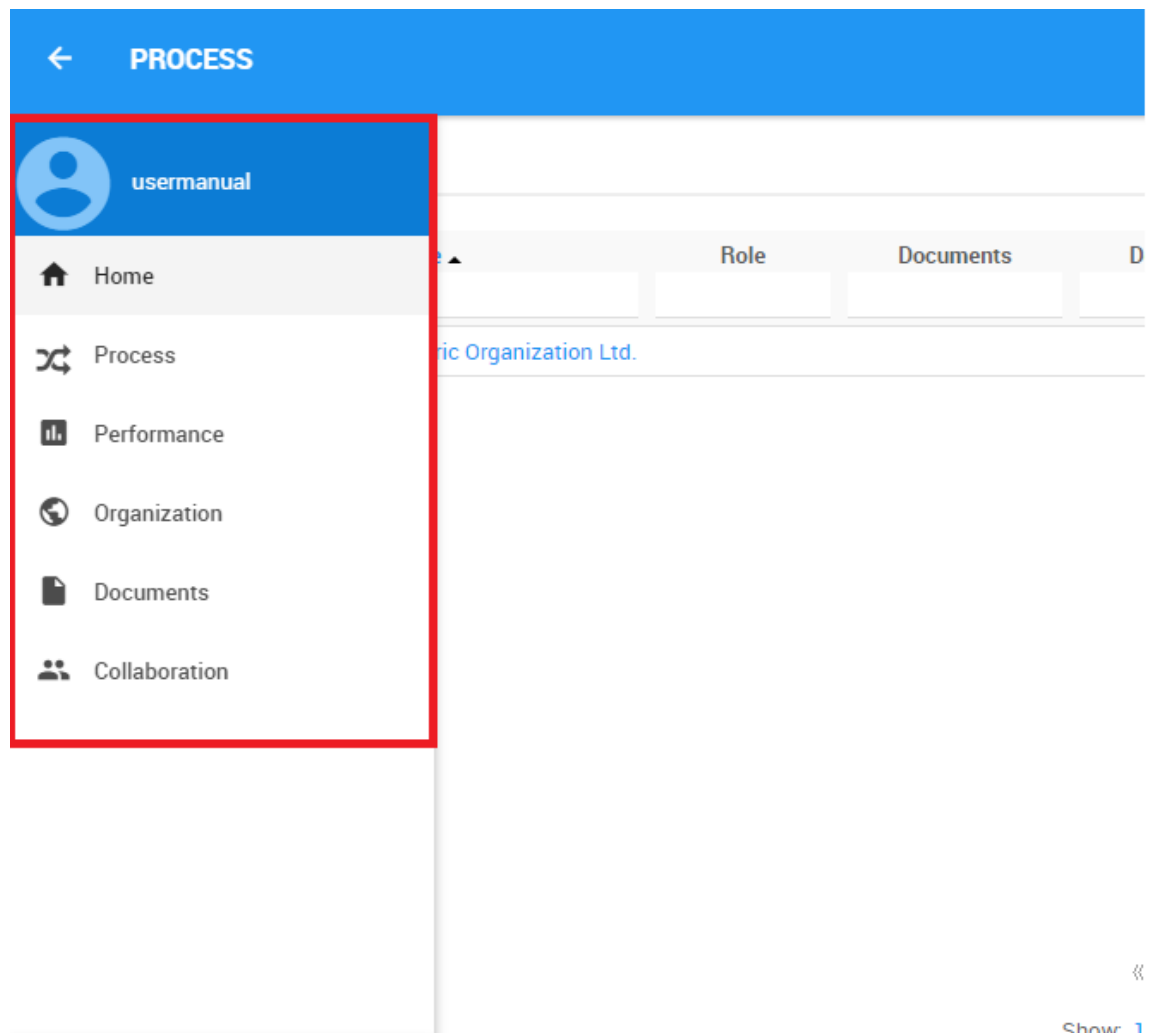


The screenshot shows the top navigation bar with a blue background. On the left, there is a red box around a hamburger menu icon (three horizontal lines) and the word "HOME". On the right, there are search, notification, and user profile icons. Below the navigation bar, there are two main sections: "My Processes & Tasks" and "My Documents". Each section contains a table with columns for Graph, Name, Type, and Last Modified. The "My Processes & Tasks" table has 11 rows, and the "My Documents" table has 11 rows. At the bottom of each table, there are pagination controls.

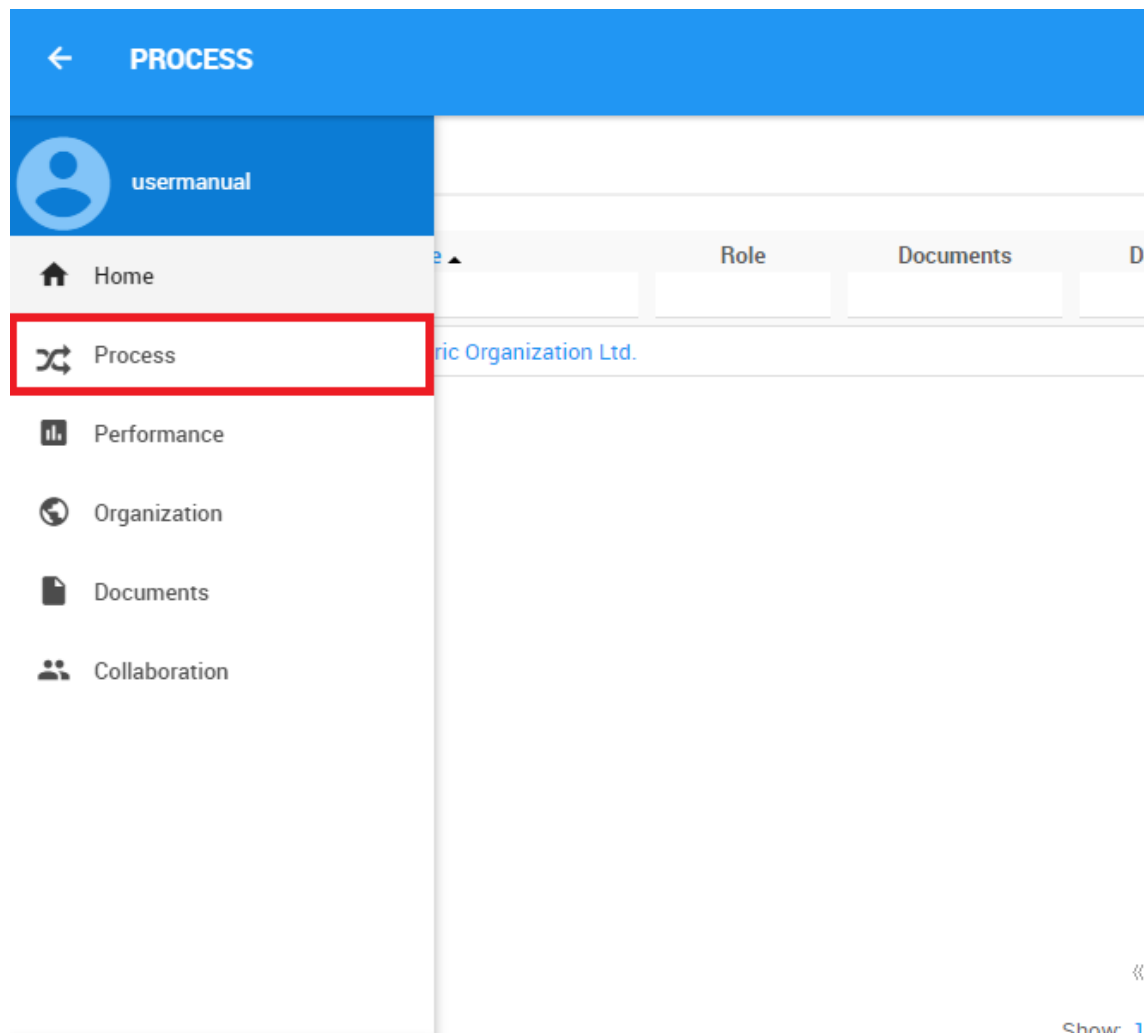
Graph	Name	Type	Last Modified
	Accounting	Process	04-Apr-2017
	Acquire Target	Task	11-Apr-2017
	Acquisition Process	Process	11-Apr-2017
	After-Sales Support	Process	11-Apr-2017
	Analyze Business Segments	Task	04-Apr-2017
	Contact Customer	Task	11-Apr-2017
	Contact Customer	Task	11-Apr-2017
	Customer Approach	Task	04-Apr-2017
	Evaluate Targets	Task	11-Apr-2017
	Financial Statement Preparation	Process	04-Apr-2017
	Identify Prospective Targets	Task	11-Apr-2017

Graph	Name	Type	Last Modified
	Acquisition Model #1	Document	11-Apr-2017
	Acquisition Model #2	Document	11-Apr-2017
	Acquisition Model #3	Document	11-Apr-2017
	Acquisition Model #4	Document	11-Apr-2017
	Acquisition Model #5	Document	11-Apr-2017
	Acquisition Model #6	Document	11-Apr-2017
	Customer Approach Guide	Document	11-Apr-2017
	Industry Report #1	Document	04-Apr-2017
	Industry Report #3	Document	04-Apr-2017
	Interest Questionnaire	Document	11-Apr-2017

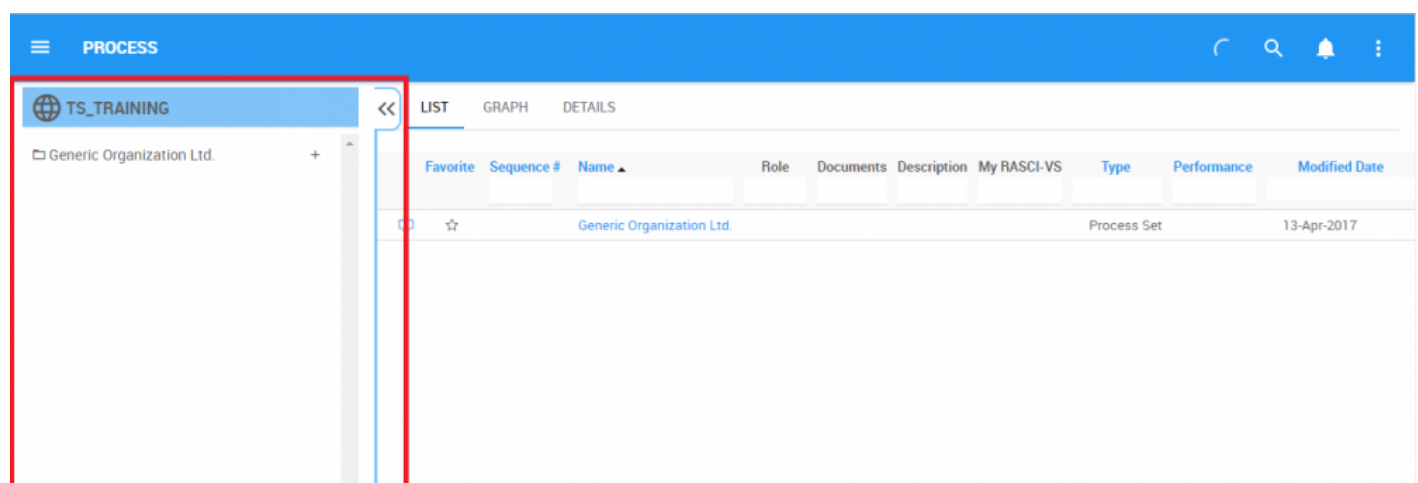
2. Click the Navigation Menu, and Navigation Panel will be generated on the left-handed side of the screen



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.







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.

 **PROCESS**

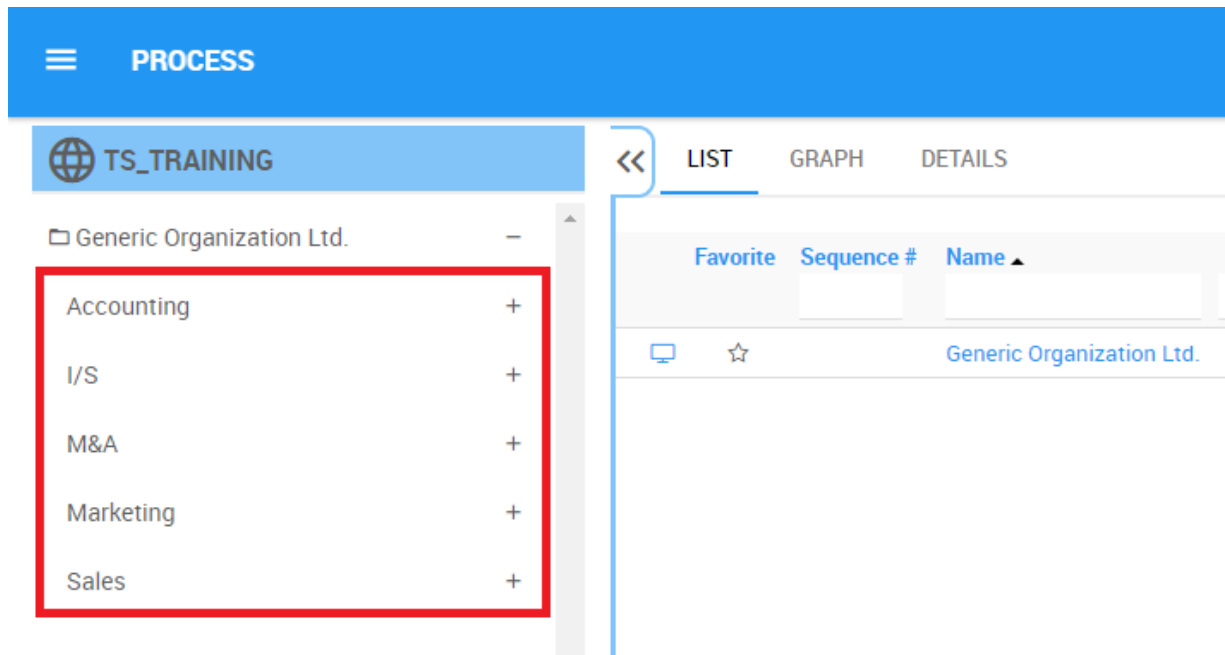
 **TS_TRAINING**



Generic Organization Ltd. 

 **LIST** GRAPH DETAILS

Favorite	Sequence #	Name ▲
		Generic Organization Ltd.

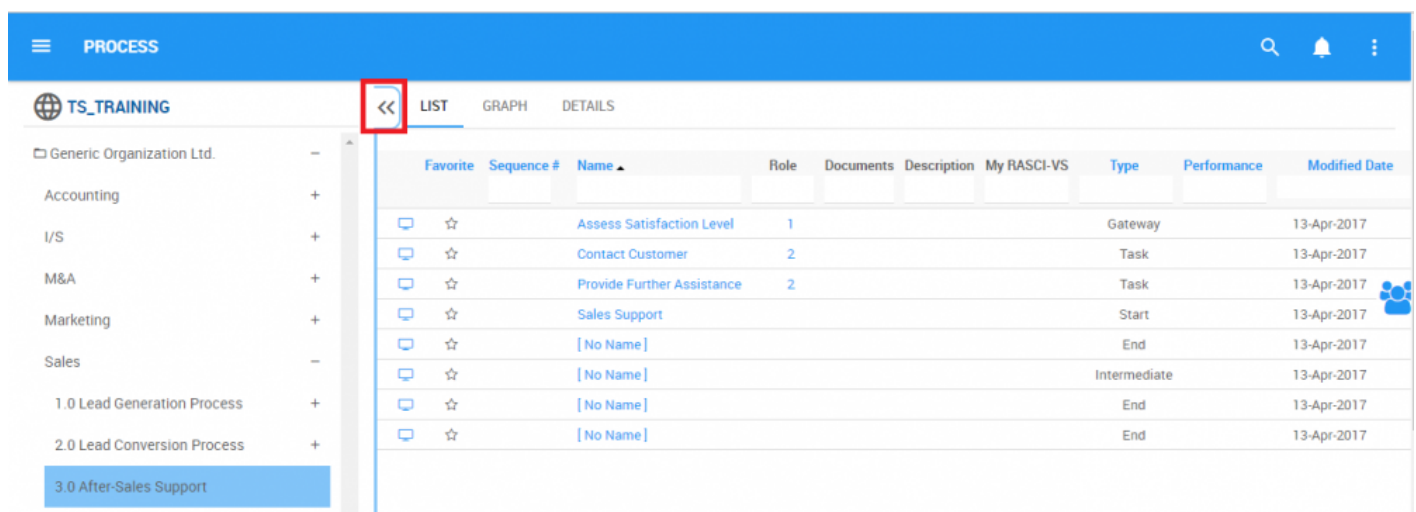
6. Clicking this icon will generate a list of all sub-items



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



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.

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

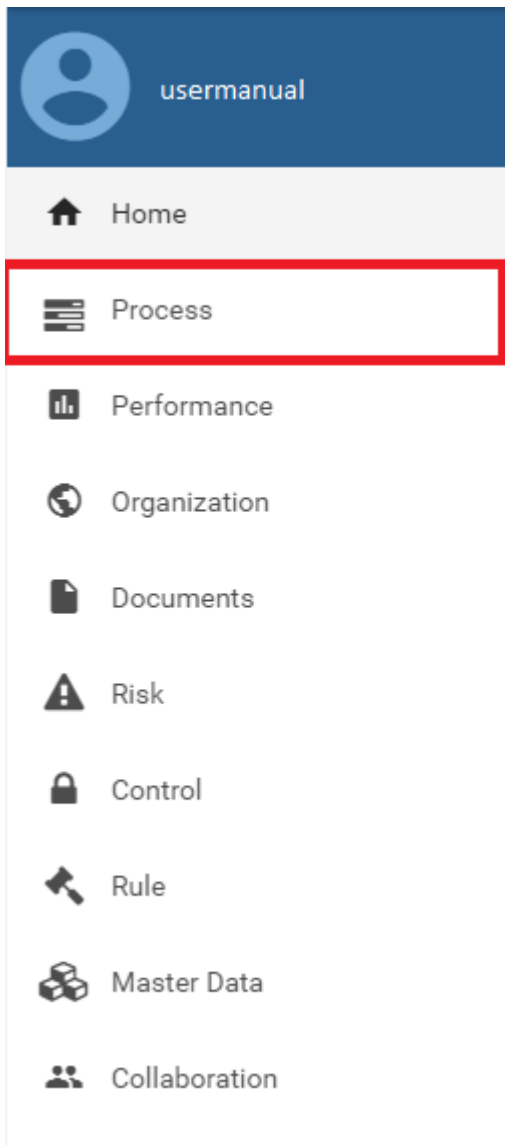
Processes that have been published from the EPC Modeler can be viewed in this module.

How to access the Processes module:

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



2. Click on **Process**



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

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)



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).





PROCESS										
<div> <div>>></div> <div> <div>LIST</div> <div>GRAPH</div> <div>DETAILS</div> </div> </div>										
Favorite	Sequence #	Name ▲	Role	Documents	Description	My RASCI-VS	Type	Performance	Modified Date	Status
		Generic Organization Ltd.					Process Set		13-Apr-2017	Published

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

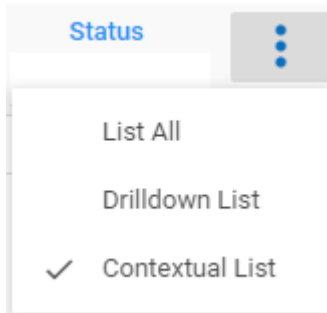
To simplify process viewing; users **are not** shown all major sub-processes and tasks that they are associated to. However users can display these sub-processes and associated objects within the **List View**. Please see the **Optional** steps below:

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



PROCESS										
<div> <div> <div>>></div> <div> <div>LIST</div> <div>GRAPH</div> <div>DETAILS</div> </div> </div> </div>										
Favorite	Sequence #	Name ▲	Role	Documents	Description	My RASCI-VS	Type	Performance	Modified Date	
	★	Generic Organization Ltd.					Process Set		13-Apr-2017	
	☆	Subsidiary 1					Process Set		02-May-2017	
	☆	Subsidiary 2					Process Set		02-May-2017	
	☆	Subsidiary 3					Process Set		02-May-2017	

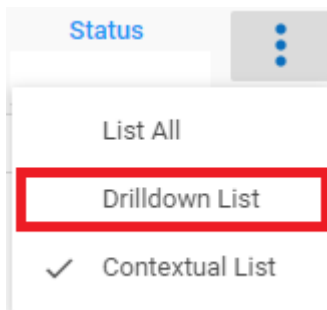
5. **(Optional)** Click on the icon and it will generate a drop-down menu



✿ 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

PROCESS										
>> LIST GRAPH DETAILS										
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.

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”.

PROCESS										
LIST GRAPH DETAILS										
Favorite	Seq #	Name ▲	Role	Documents	Description	My RASCI-VS	Type	Performance	Modified Date	
	☆	1					PROCESS		15-Nov-2016	
	☆	2					PROCESS		15-Nov-2016	
	☆	3					PROCESS		15-Nov-2016	
	☆	A					PROCESS		15-Nov-2016	
	☆	B					PROCESS		15-Nov-2016	
	☆	C					PROCESS		15-Nov-2016	

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

PROCESS										
LIST GRAPH DETAILS										
Favorite	Seq #	Name ▼	Role	Documents	Description	My RASCI-VS	Type	Performance	Modified Date	
	☆	C					PROCESS		15-Nov-2016	
	☆	B					PROCESS		15-Nov-2016	
	☆	A					PROCESS		15-Nov-2016	
	☆	3					PROCESS		15-Nov-2016	
	☆	2					PROCESS		15-Nov-2016	
	☆	1					PROCESS		15-Nov-2016	

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)

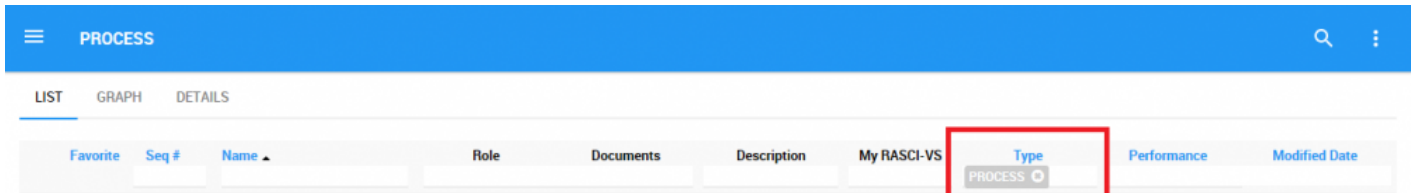
The Filtering section will cover the following:

1. What are [Default Filters](#)

2. How to [Remove Filters](#)
3. How to [Add Filters](#)
4. How to [Combine Filters](#)

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.

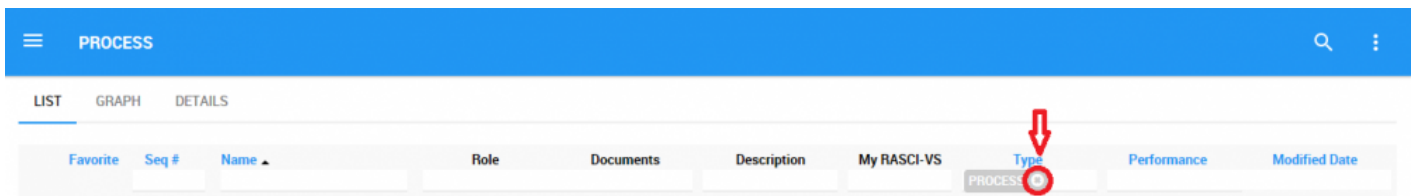


Since sub-processes are also processes, you must use the “PROCESS” filter.

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.

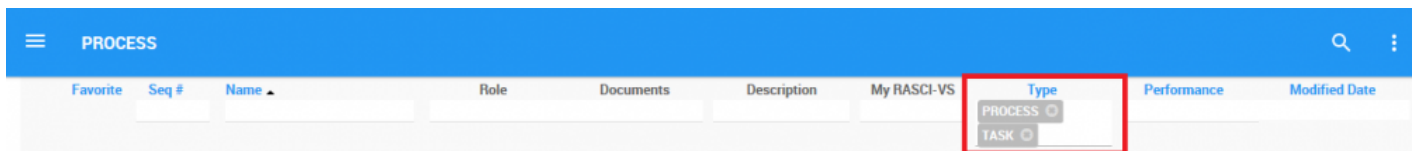
To do so, click on the  button beside the filter name.



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.






PROCESS								
LIST GRAPH DETAILS								
Favorite	Seq #	Name	Role	Documents	Description	My RASCI-VS	Type	Performance
	1.2	ABC Process	[EMPTY]	[NOT-EMPTY]	[NOT-EMPTY]	CONSULTED INFORMED	PROCESS TASK	GREEN
2016-12-13 - 2016-12-1								

4.4.2.3 Quick Graph View

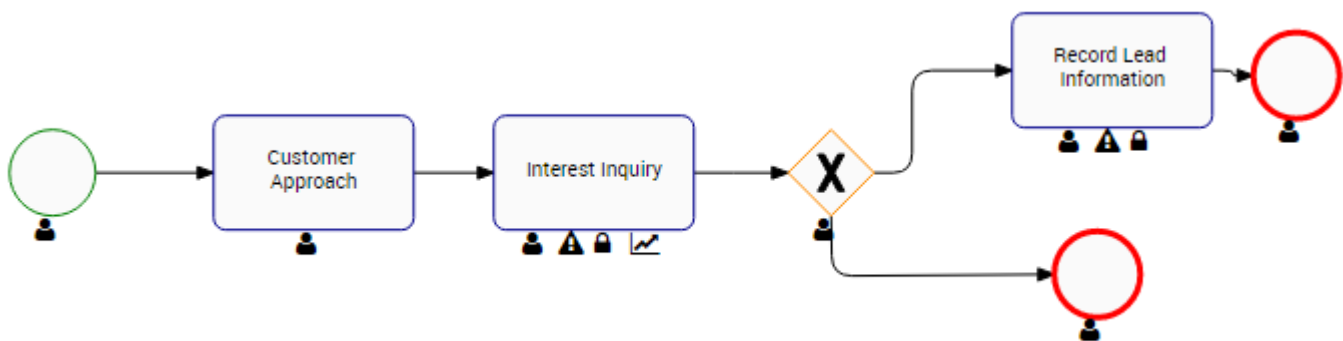
Quick Graph View is a feature of the EPC Web App that allows users to immediately view a graph associated with a process or object. While Graph's will be further explained below, the Quick Graph View allows users to quickly navigate to a Graph from "List View".

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.

PROCESS											
LIST GRAPH DETAILS											
Favorite	Sequence #	Name	Role	Documents	Description	My RASCI-VS	Type	Performance	Modified Date	Status	
	☆	3.0	After-Sales Support				Process		13-Apr-2017	Published	
	☆	2.0	Lead Conversion Process				Process		26-Apr-2017	Published	
	☆	1.0	Lead Generation Process				Process		26-Apr-2017	Published	

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.

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.

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.

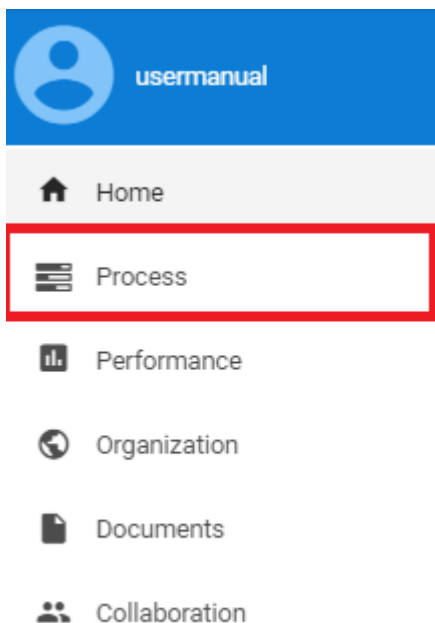
This section will outline Manual Navigation, please see “[Quick Graph View](#)” section for alternative navigation options.

How to navigate to the Graph section (Manual Navigation)

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



2. Click on **Process**



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

PROCESS

>>

LIST

GRAPH

DETAILS

Favorite	Sequence #	Name	Role	Documents	Description	My RASCI-VS	Type	Performance	Modified Date	Status	
		Generic Organization Ltd.					Process Set		13-Apr-2017	Published	

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-refresh the page to include all of the child processes and related objects.

PROCESS


>>

LIST

GRAPH

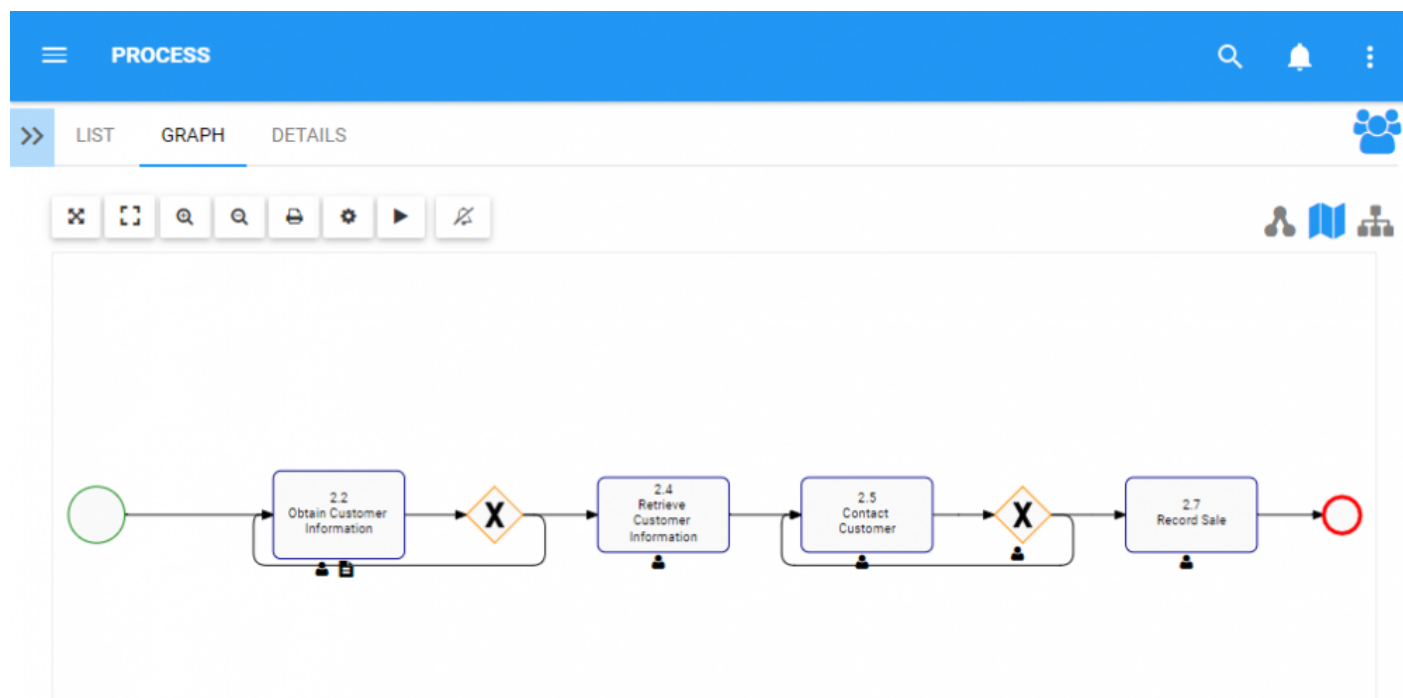
DETAILS

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	
	☆	Contact Customer	2	1			Task		26-Apr-2017	Published	
	☆	Contact Customer	2				Task		13-Apr-2017	Published	

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

PROCESS										
<div> <div>>></div> <div>LIST</div> <div>GRAPH</div> <div>DETAILS</div> </div>										
Favorite	Sequence #	Name	Role	Documents	Description	My RASCI-VS	Type	Performance	Modified Date	
		Accounting					Process		04-Apr-2017	
		Acquire Target	1			R	Task		11-Apr-2017	
		Acquisition Process	1	1		R A	Process		11-Apr-2017	
		Acquisition Process					Start		04-Apr-2017	
		Advertising Process					Process		13-Apr-2017	
		After-Sales Support	1				End		26-Apr-2017	
	3.0	After-Sales Support					Process		13-Apr-2017	
		Analyze Business Segments	4				Task		04-Apr-2017	
		Approach Prospective Custom...	1	1			Task		01-May-2017	
		Approach target with bid	1			R	Gateway		11-Apr-2017	
		Assess Satisfaction Level	1				Gateway		13-Apr-2017	
		Close Sale	2			A	Gateway		26-Apr-2017	
		Contact Customer	2	1		A	Task		26-Apr-2017	
		Contact Customer	2			A	Task		13-Apr-2017	
		Contact Office					Task		26-Apr-2017	

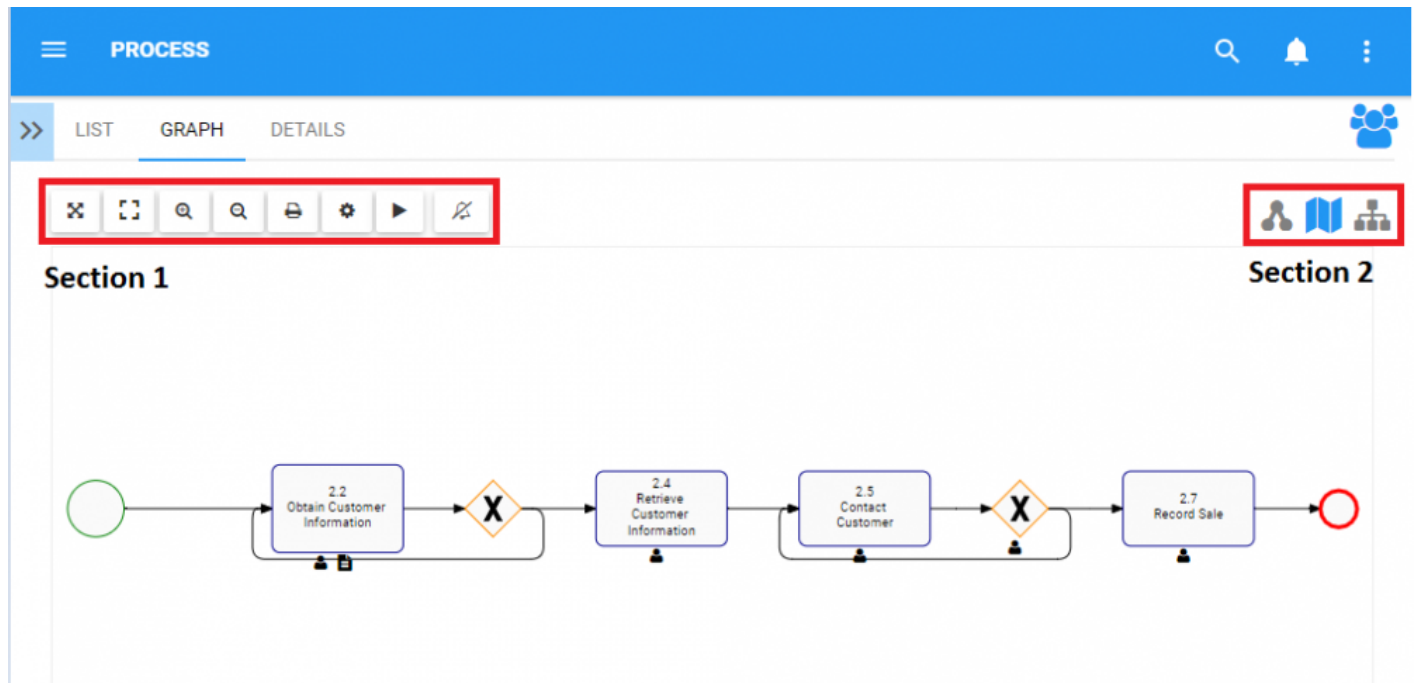
7. You will be navigated to the Graph section. By default, users will be sent to Map view in the default Graph view. An example of this view can be seen below



✿ 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

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.

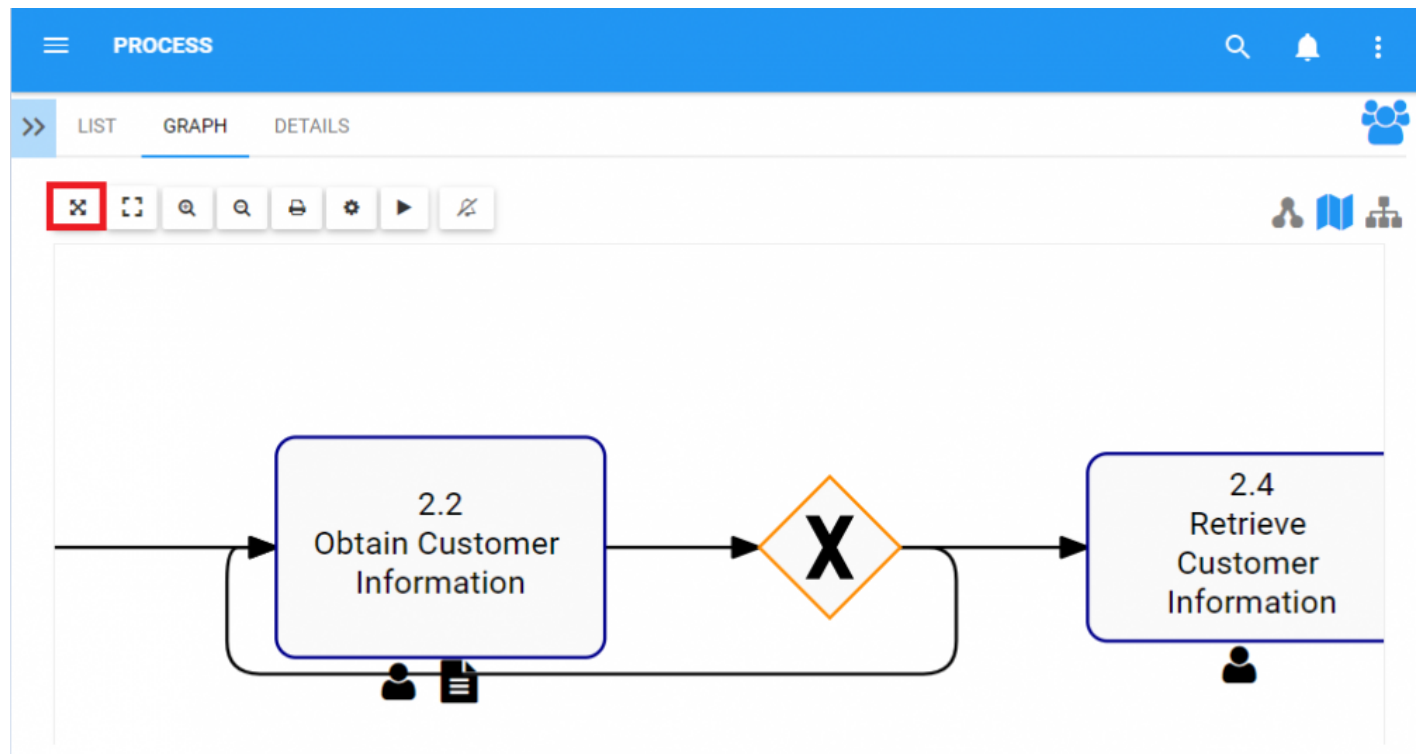
Item	Icon	Description
Impact Graph		Graph showing downstream representation of associated items
Map Graph		Traditional BPMN viewing Graph, featuring traditional Graph View, Swimlane and Matrix Swimlane options
Hierarchy Graph		Graph showing a top-down view of processes and how they fit within organizations

4.4.3.1.1.1 Fit Screen

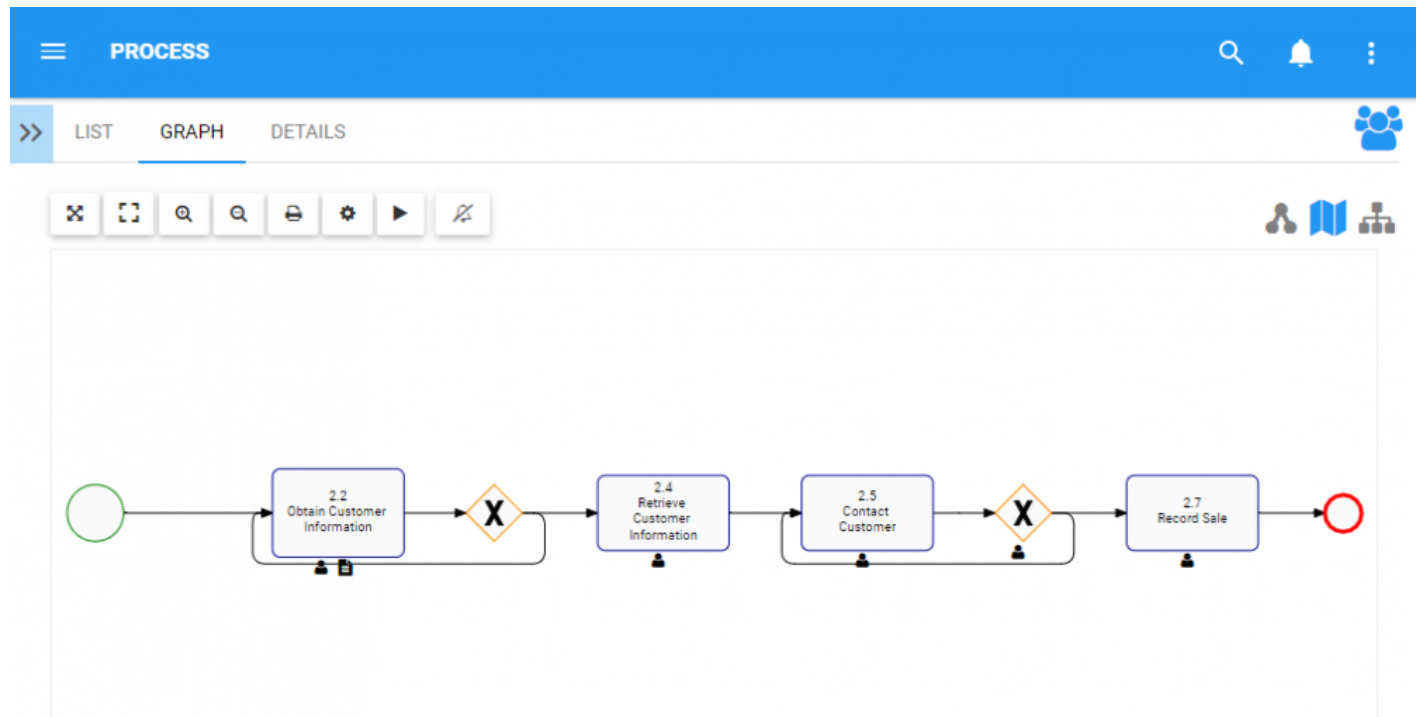
The fit screen function has been implemented to assist users replacing and re-centering processes.

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.

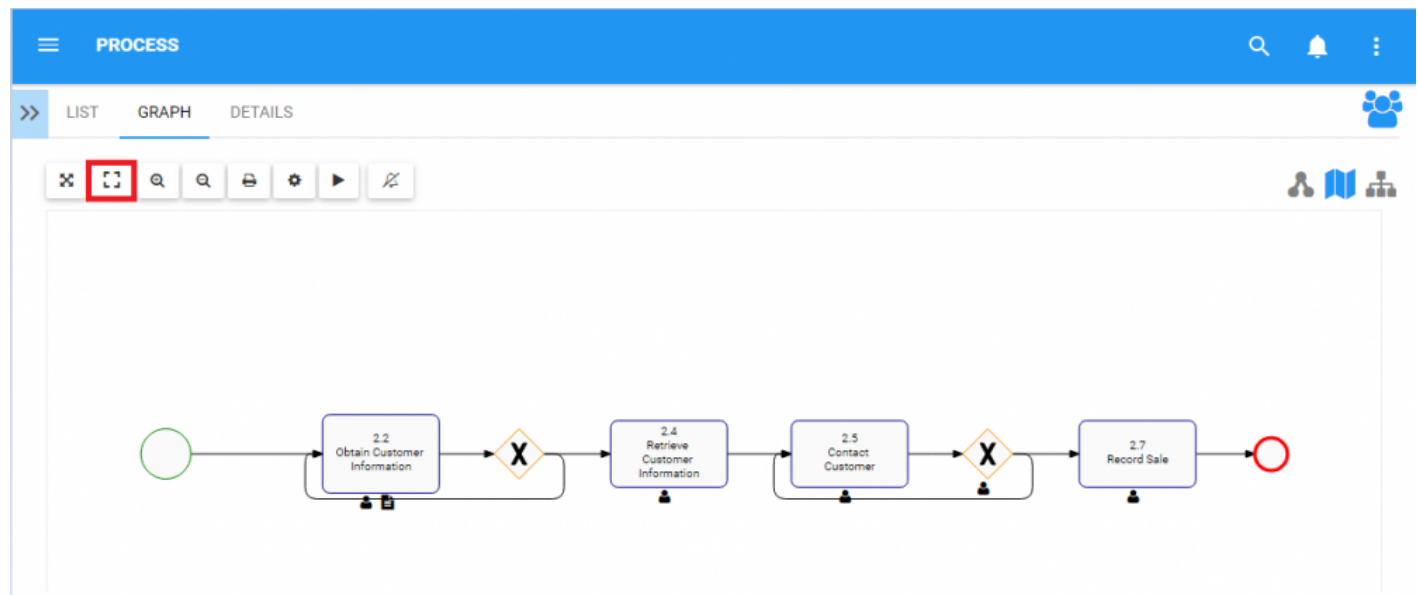


4.4.3.1.1.2 Full Screen

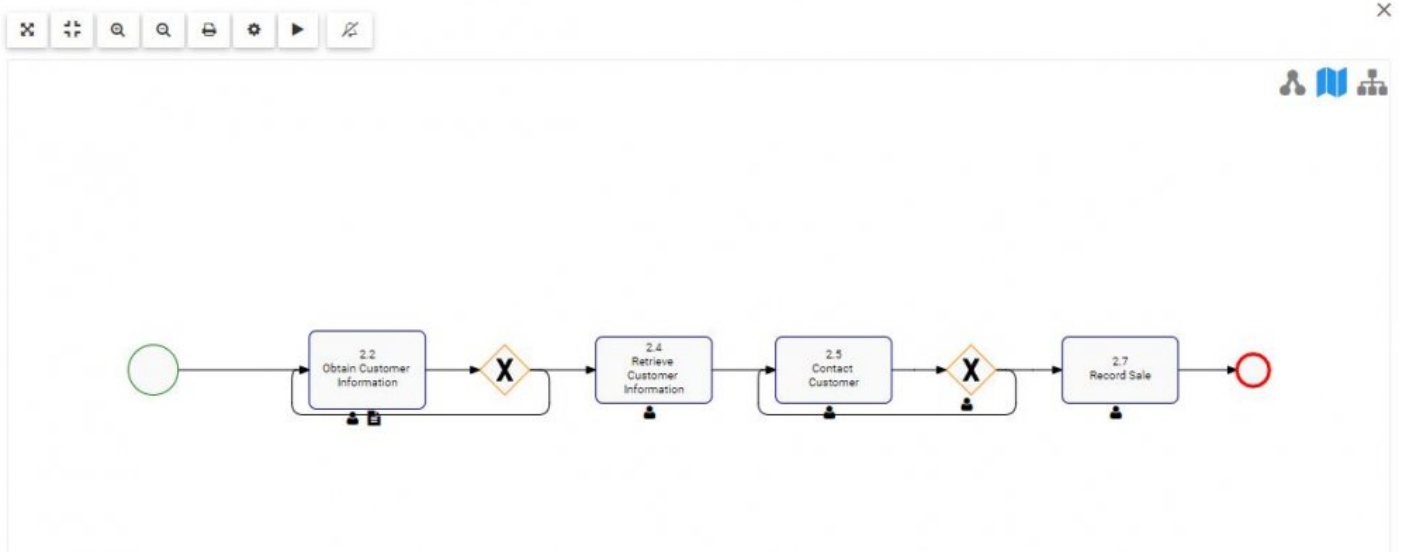
The full screen function has been implemented to assist users at viewing processes, utilizing the full screen of a user.


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

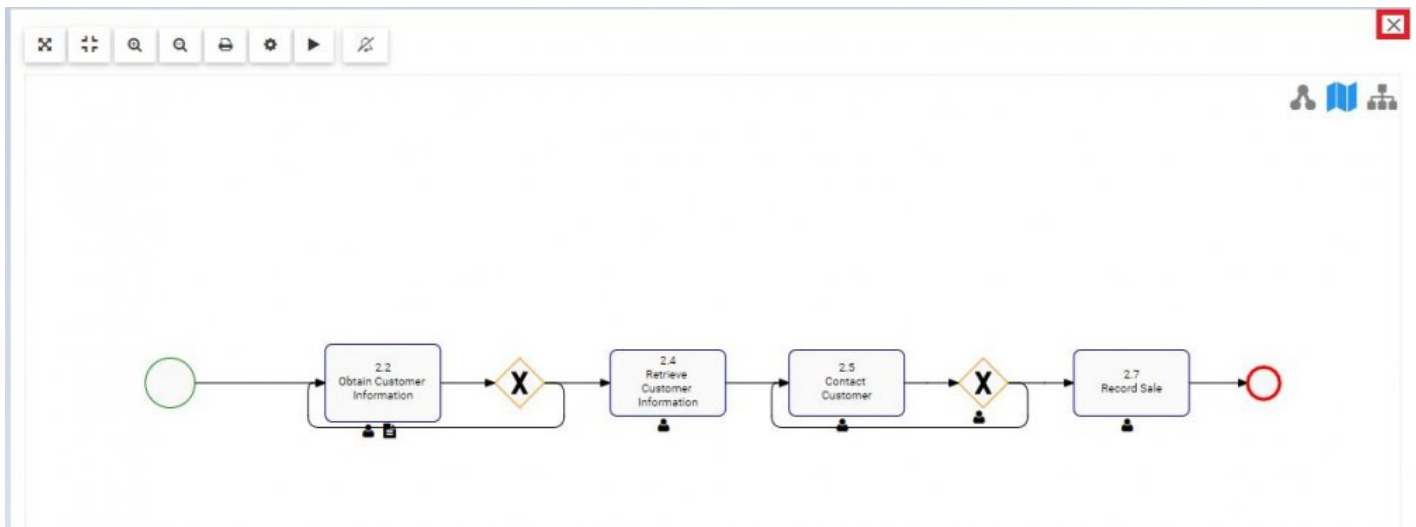
1. Select the full-screen button at the top-left hand corner of the screen



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



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

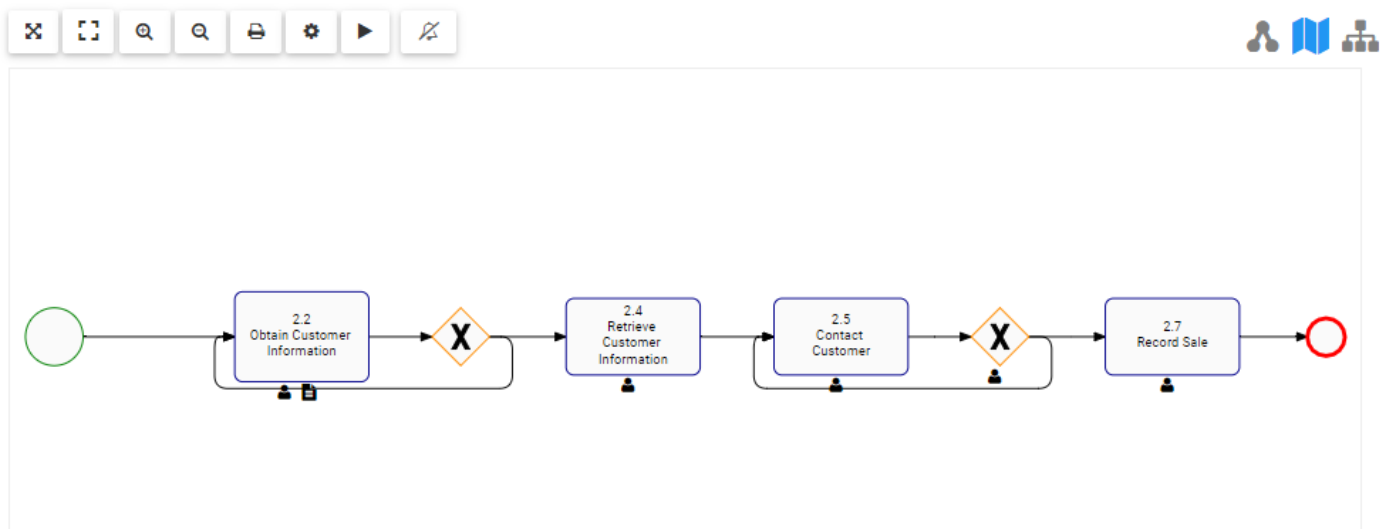


4.4.3.1.1.3 Zoom In

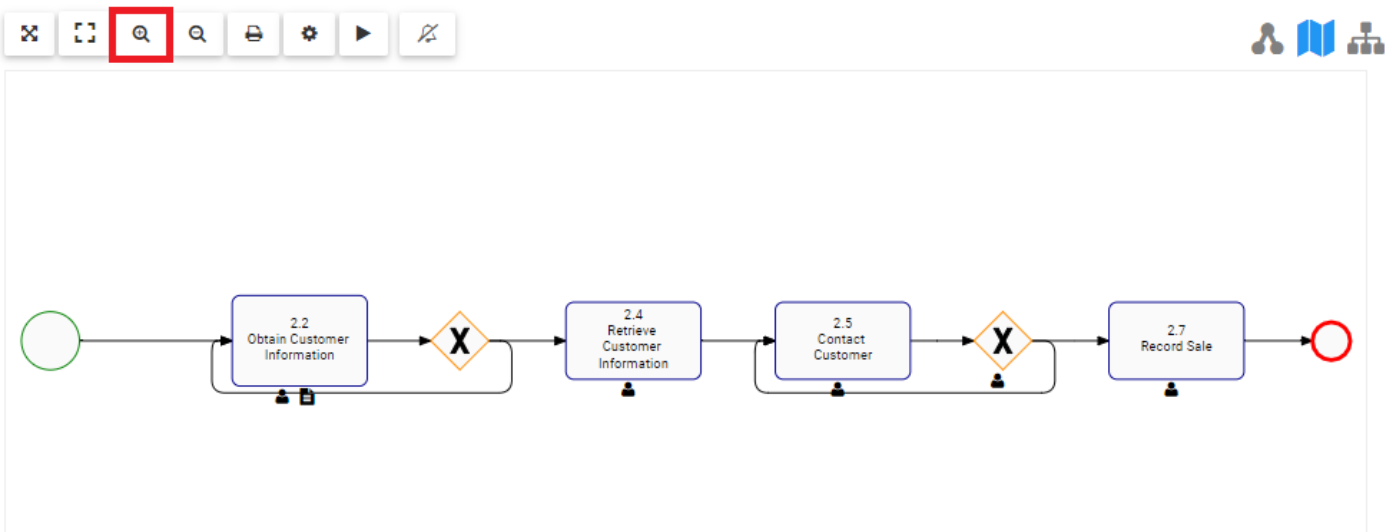
The zoom function has been implemented to assist users in viewing specific items within selected processes

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

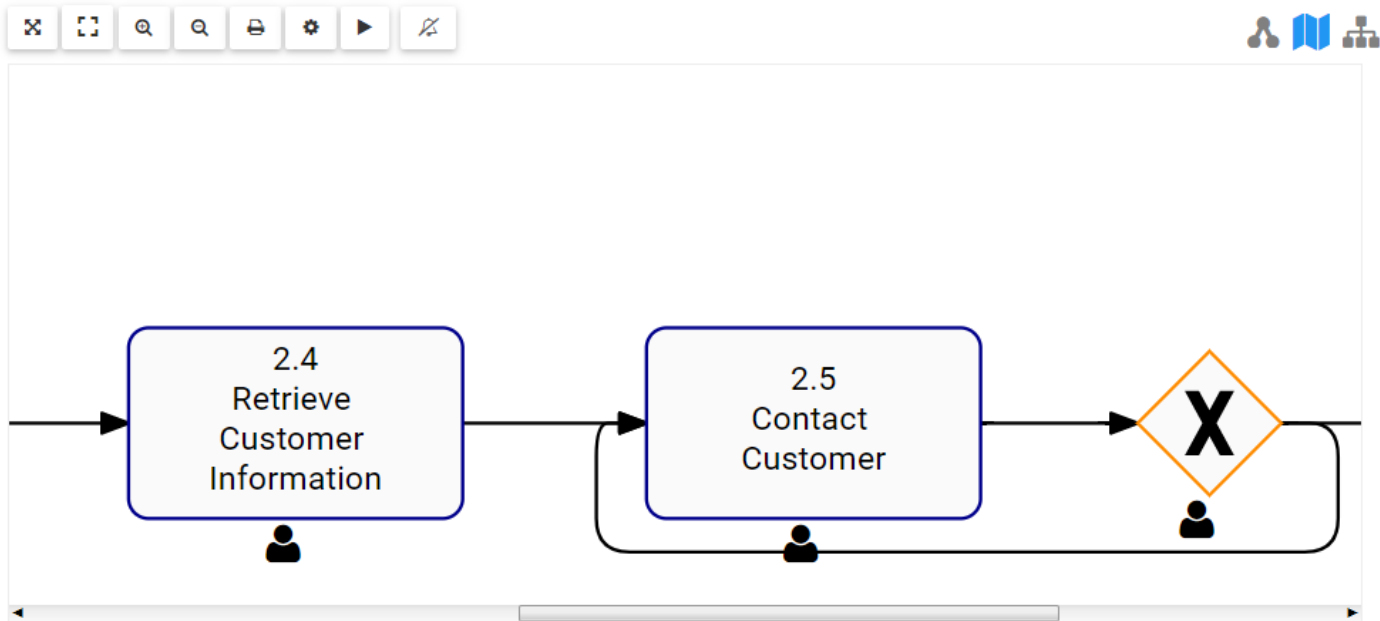
1. Navigate to the Graph tab



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

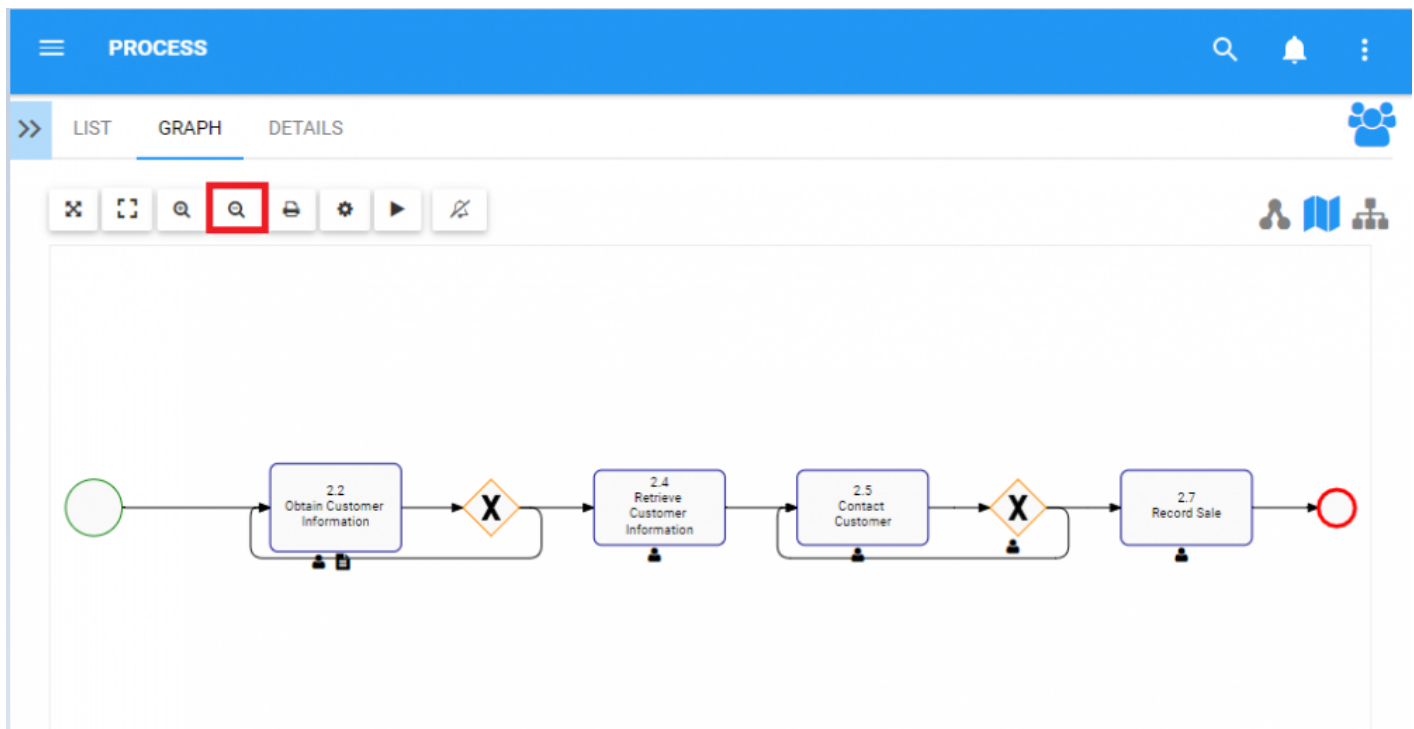
✿ **Mobile:** Users can zoom in or out on mobile devices with the use of 2 fingers.
Zooming In: Place two fingers on the screen and drag them in opposite directions until desired zoom is reached.

4.4.3.1.1.4 Zoom Out

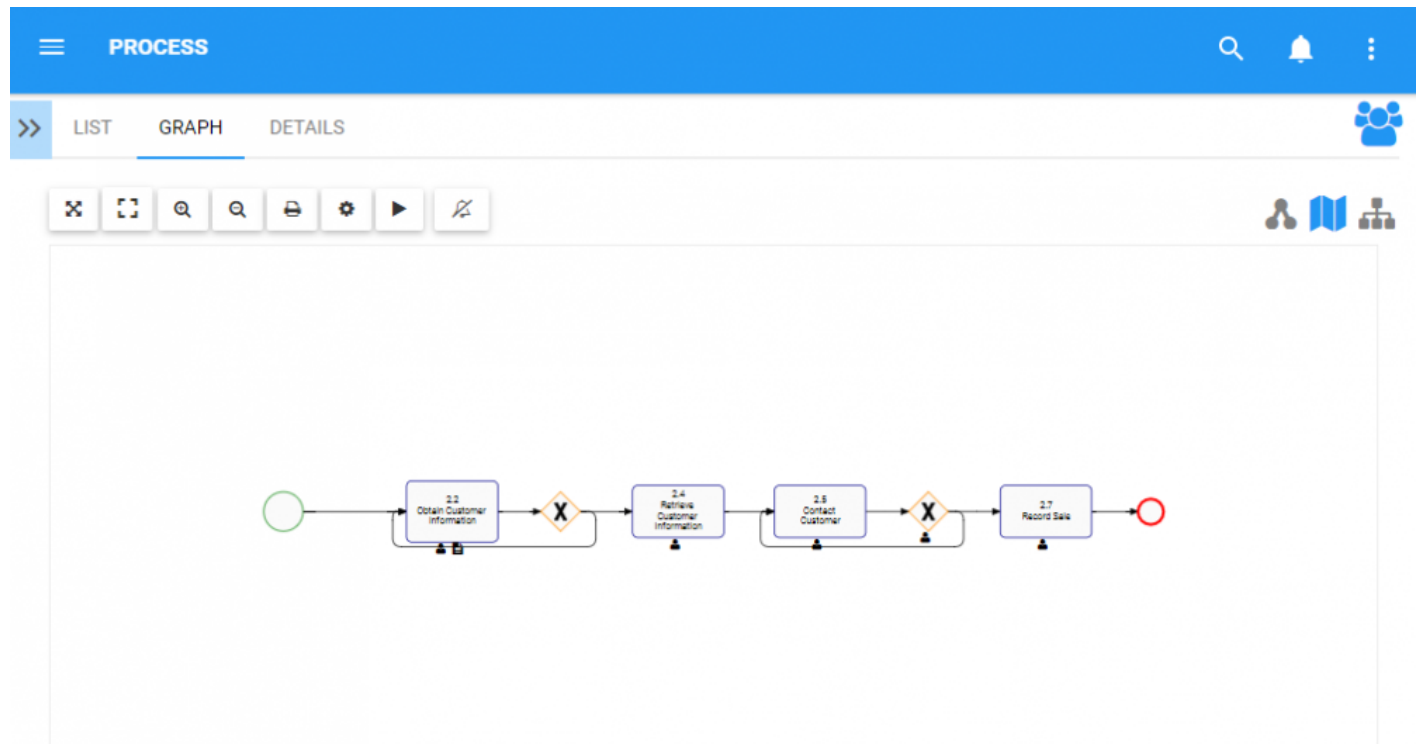
The zoom function has been implemented to assist users in viewing specific items within selected processes

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



✿ 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.

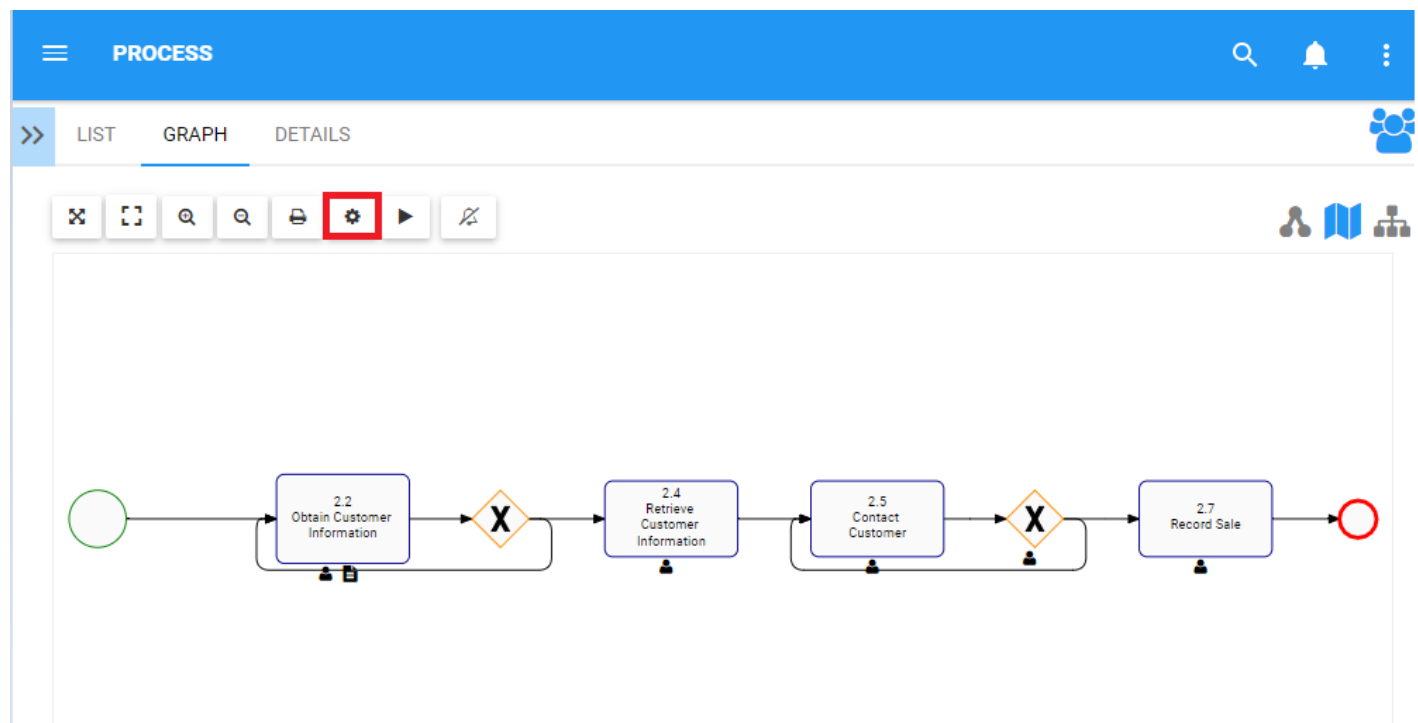
4.4.3.1.1.5 Options

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. Navigate to a process graph within the Process Module
2. Select the Options button at the upper left corner of the page



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

Map options



General



Display:	GRAPH	▼	Highlight:	NONE	▼
Swimlanes Matrix X:	ROLES	▼	Node Color:	DISABLED	▼
Swimlanes Matrix Y:	ASSETS	▼	Performance Color :	DISABLED	▼
Expand IPL:	DISABLED	▼	Shape Type:	MODELER DEFAULT	▼
Sub-Process and Reference Inline Explosion :	DISABLED	▼	Group by:	NONE	▼
Dedicated Pools:	DISABLED	▼	Auto Layout :	ON DEMAND	▼


RASCI-VS Filter



Icons & Annotations

[Save as Environment Default](#)[Reset to Default](#)[Close](#)[Save changes](#)

To expand the **Options panel**, please see the following instructions

1. To expand the **RASCI-VS Filter** on the Options panel, click on the  icon

Map options



General



Display:	GRAPH	▼	Highlight:	NONE	▼
Swimlanes Matrix X:	ROLES	▼	Node Color:	DISABLED	▼
Swimlanes Matrix Y:	ASSETS	▼	Performance Color :	DISABLED	▼
Expand IPL:	DISABLED	▼	Shape Type:	MODELER DEFAULT	▼
Sub-Process and Reference Inline Explosion :	DISABLED	▼	Group by:	NONE	▼
Dedicated Pools:	DISABLED	▼	Auto Layout :	ON DEMAND	▼

RASCI-VS Filter



Icons & Annotations

[Save as Environment Default](#)[Reset to Default](#)[Close](#)[Save changes](#)

2. The RACI-VS Filter Options will be expanded

Map options



General



Display:	GRAPH	▼	Highlight:	NONE	▼
Swimlanes Matrix X:	ROLES	▼	Node Color:	DISABLED	▼
Swimlanes Matrix Y:	ASSETS	▼	Performance Color :	DISABLED	▼
Expand IPL:	DISABLED	▼	Shape Type:	MODELER DEFAULT	▼
Sub-Process and Reference Inline Explosion :	DISABLED	▼	Group by:	NONE	▼
Dedicated Pools:	DISABLED	▼	Auto Layout :	ON DEMAND	▼


RASCI-VS Filter



Roles :	ALL	▼	Assets:	ALL	▼
Resources:	ALL	▼	Org Units:	ALL	▼

Icons & Annotations

[Save as Environment Default](#)[Reset to Default](#)[Close](#)[Save changes](#)

3. To expand the **Icons & Annotations** on the Options panel, click on the  icon

Map options



General



Display:	GRAPH	▼	Highlight:	NONE	▼
Swimlanes Matrix X:	ROLES	▼	Node Color:	DISABLED	▼
Swimlanes Matrix Y:	ASSETS	▼	Performance Color :	DISABLED	▼
Expand IPL:	DISABLED	▼	Shape Type:	MODELER DEFAULT	▼
Sub-Process and Reference Inline Explosion :	DISABLED	▼	Group by:	NONE	▼
Dedicated Pools:	DISABLED	▼	Auto Layout :	ON DEMAND	▼

RASCI-VS Filter



Icons & Annotations

[Save as Environment Default](#)[Reset to Default](#)[Close](#)[Save changes](#)

4. The Icons & Annotations Options will be expanded

Map options

General

Display:	GRAPH	▼	Highlight:	NONE	▼
Swimlanes Matrix X:	ROLES	▼	Node Color:	DISABLED	▼
Swimlanes Matrix Y:	ASSETS	▼	Performance Color:	DISABLED	▼
Expand IPL:	DISABLED	▼	Shape Type:	MODELER DEFAULT	▼
Sub-Process and Reference inline Explosion :	DISABLED	▼	Group by:	NONE	▼
Dedicated Pools:	DISABLED	▼	Auto Layout :	ON DEMAND	▼

RASCI-VS Filter

Roles :	ALL	▼	Assets:	ALL	▼
Resources:	ALL	▼	Org Units:	ALL	▼

Icons & Annotations

Roles :	ICON	▼	Assets :	ICON	▼
Documents :	ICON	▼	Resources :	NONE	▼
Org Units :	ICON	▼	Risks :	ICON	▼
Rules :	ICON	▼	Controls :	ICON	▼
Objectives :	NONE	▼	Entities :	NONE	▼
Attributes :	NONE	▼	KCI :	NONE	▼
KPI :	ICON	▼	KRI :	NONE	▼
Materials :	ICON	▼	IPL :	ICON	▼
Categories :	NONE	▼	Annotation :	ICON	▼
Boundary Events :	NONE	▼	Description :	ICON	▼
Event & Gateway Name :	NONE	▼	Services :	NONE	▼


Save as Environment Default

Reset to Default

Close

Save changes

To Hide the Options panel, please see the following instructions

1. To Hide the General, the RASCI-VS filter or the Icons & Annotations options, click on the  icon. The following example hides the General Options.

Map options ×

General −

Display:	GRAPH ▼	Highlight:	NONE ▼
Swimlanes Matrix X:	ROLES ▼	Node Color:	DISABLED ▼
Swimlanes Matrix Y:	ASSETS ▼	Performance Color :	DISABLED ▼
Expand IPL:	DISABLED ▼	Shape Type:	MODELER DEFAULT ▼
Sub-Process and Reference Inline Explosion :	DISABLED ▼	Group by:	NONE ▼
Dedicated Pools:	DISABLED ▼	Auto Layout :	ON DEMAND ▼

RASCI-VS Filter +

Icons & Annotations +

Save as Environment Default

Reset to Default

Close

Save changes

2. The General Options will be hidden

Map options

×

General	+
RASCI-VS Filter	+
Icons & Annotations	+

Save as Environment Default

Reset to Default

Close

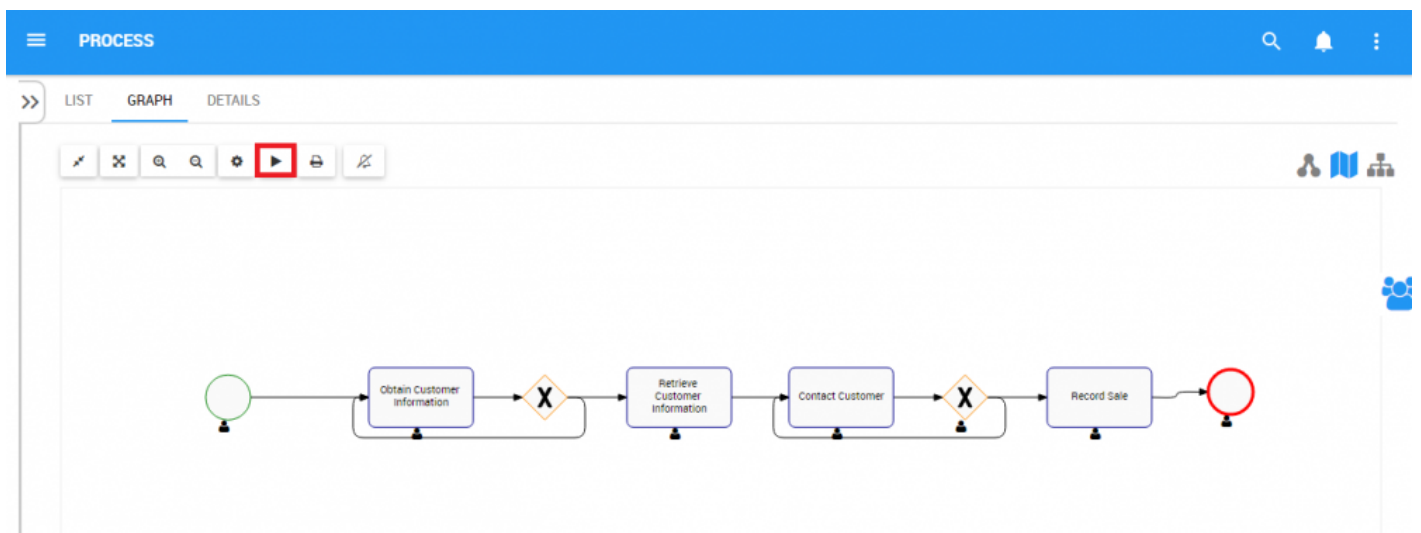
Save changes

4.4.3.1.1.6 Auto Layout

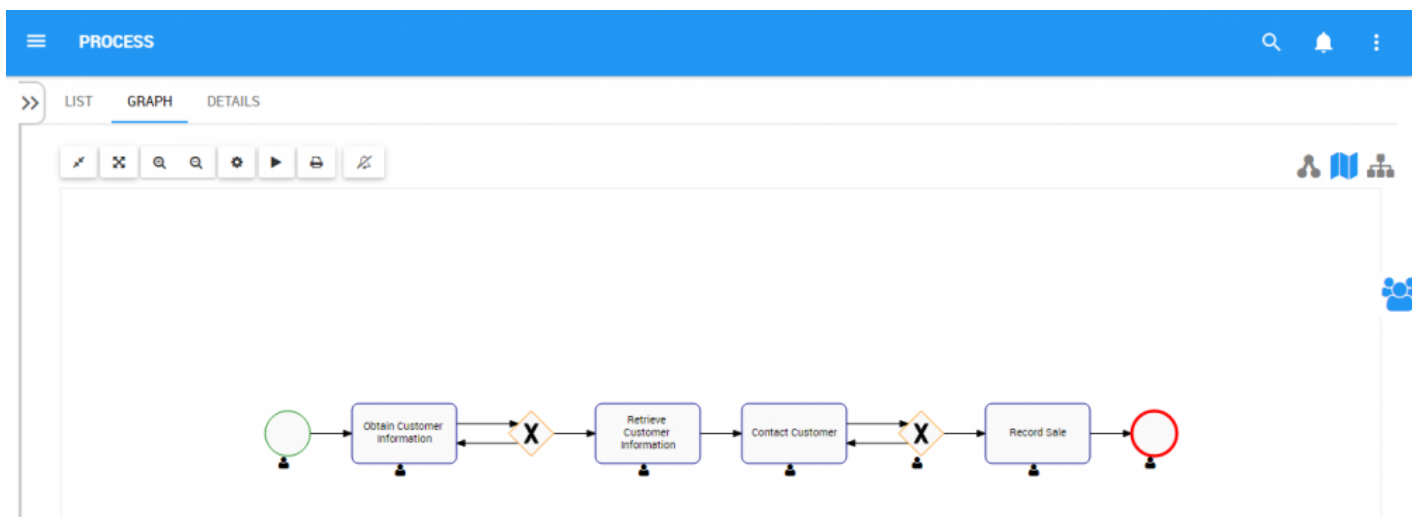
The Auto Layout function has been added to optimize process layout after user editing. To reduce the time consuming process of arranging different items and tasks, the Auto Layout button uses a routing algorithm inbuilt within the EPC to generate a user friendly layout at the click of a button.

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





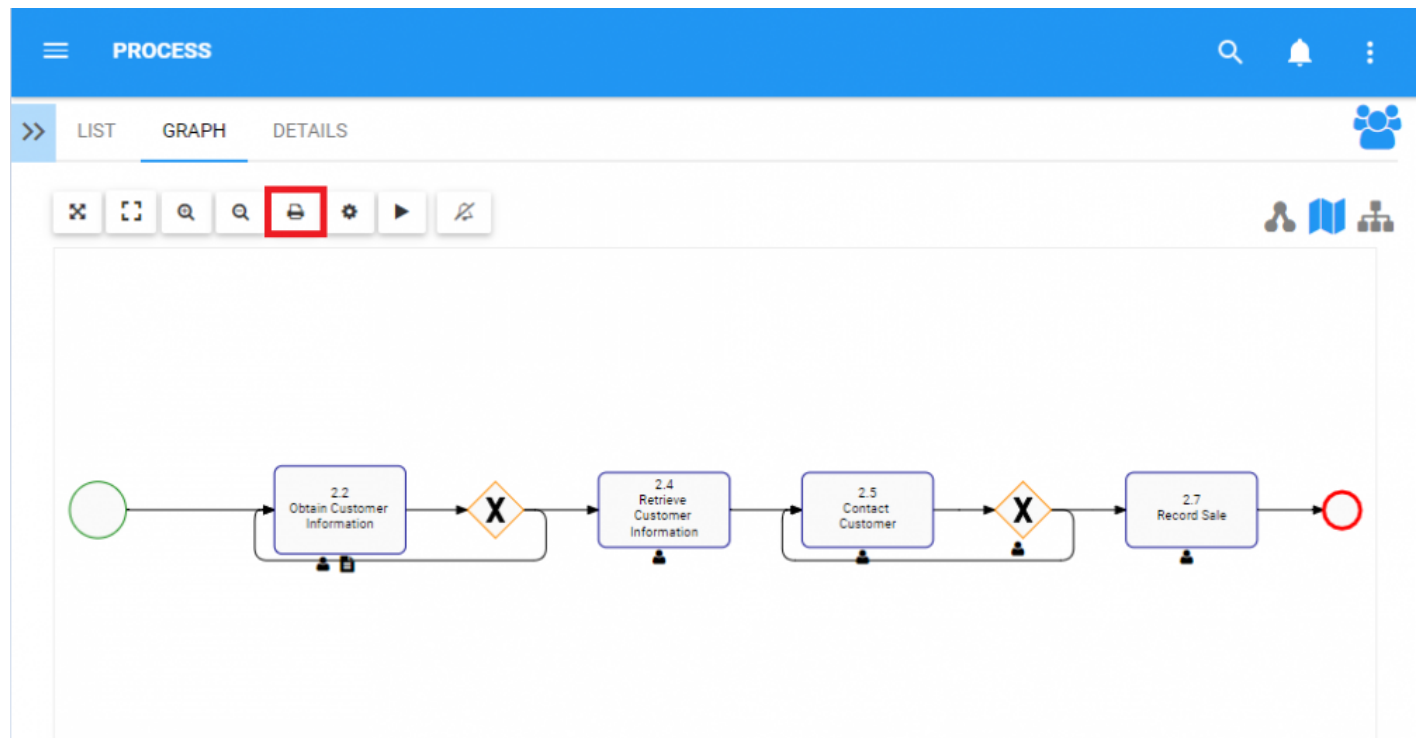
This layout change is a temporary change done to optimize the view of the current graph. These changes are not permanent but are saved by a user locally.

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

Print Settings

x

General

A Print Mode:

B Page Layout: **C** Page Size:

Multi page print only

D Graph Layout:

Close

Print

	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 (216 × 279 mm) 8.5 × 14.0 in (216 × 356 mm) 11.7 × 16.54 in (297 × 420 mm) 8.3 × 11.7 in (210 × 297 mm)
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

4.4.3.1.1.7.1 Printing from Internet Explorer

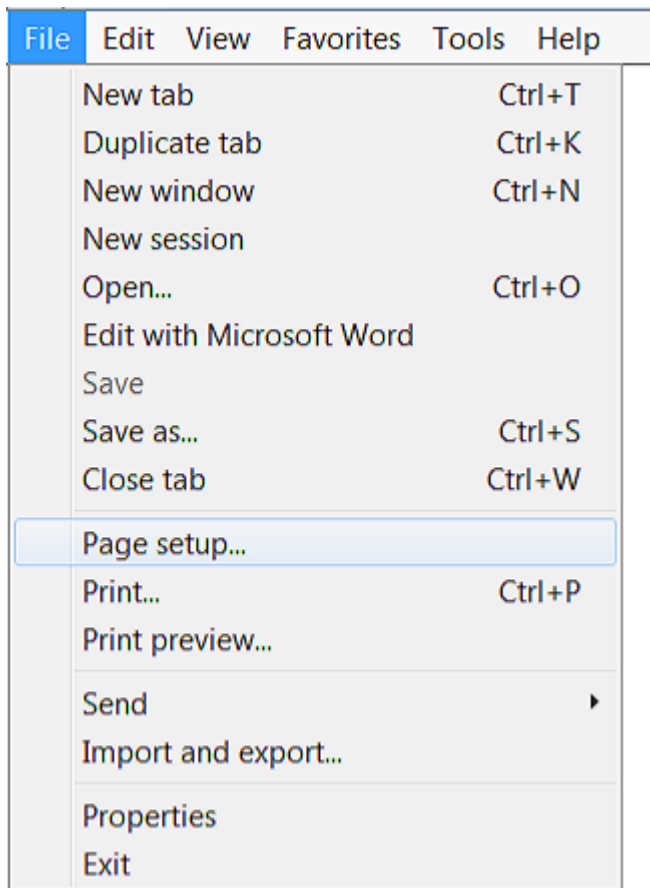
Internet Explorer sets default margins, headers and footers, all of which take up extra space on EPC prints. Consequentially, this can result in:

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

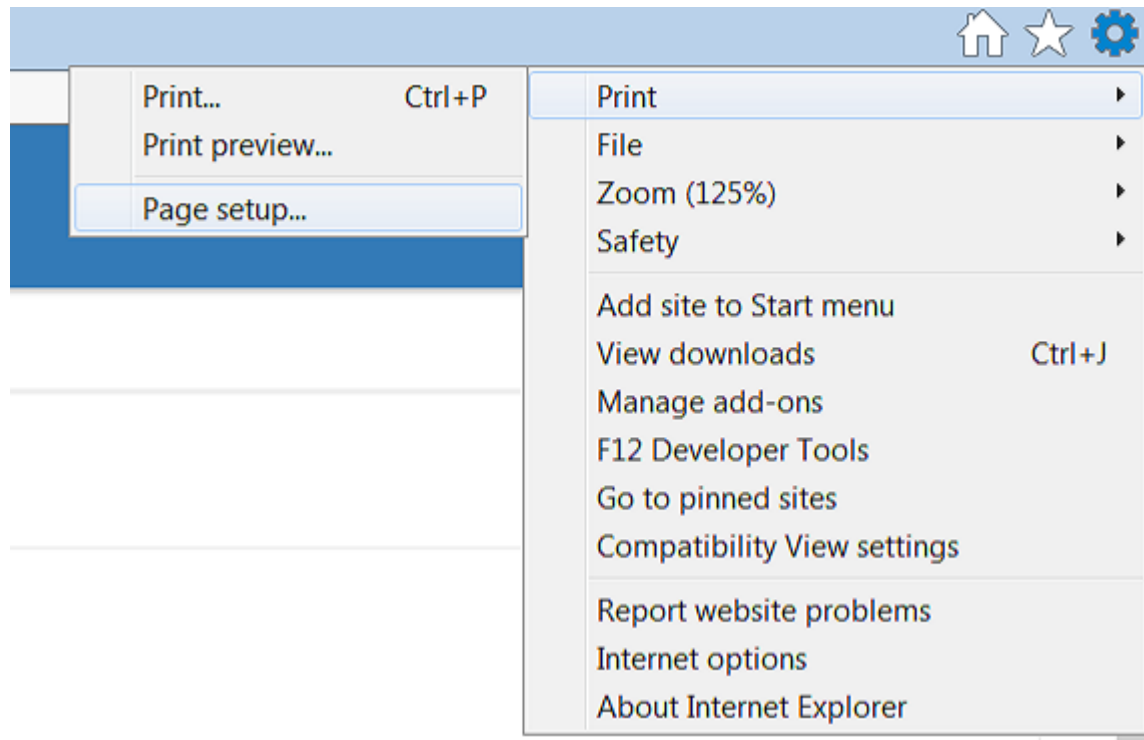
To ensure an optimal print of process maps from Internet Explorer, users must first bypass their browser's Page Setup settings.

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

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



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



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


The screenshot shows the 'Page Setup' dialog box with the following elements and numbered callouts:

- 1** Points to the 'Margins (millimeters)' section, which includes input fields for Left, Right, Top, and Bottom, all set to 0.
- 2** Points to the 'Paper Options' section, specifically the 'Portrait' radio button.
- 3** Points to the 'Enable Shrink-to-Fit' checkbox.
- 4** Points to the 'Headers and Footers' section, which contains two columns of dropdown menus for header and footer text, all currently set to '-Empty-'. A 'Change font' button is located below these dropdowns.

Other visible elements include a 'Page Size' dropdown set to 'Letter', 'Print Background Colors and Images' checkbox, a preview of the page layout, and 'OK' and 'Cancel' buttons at the bottom right.

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

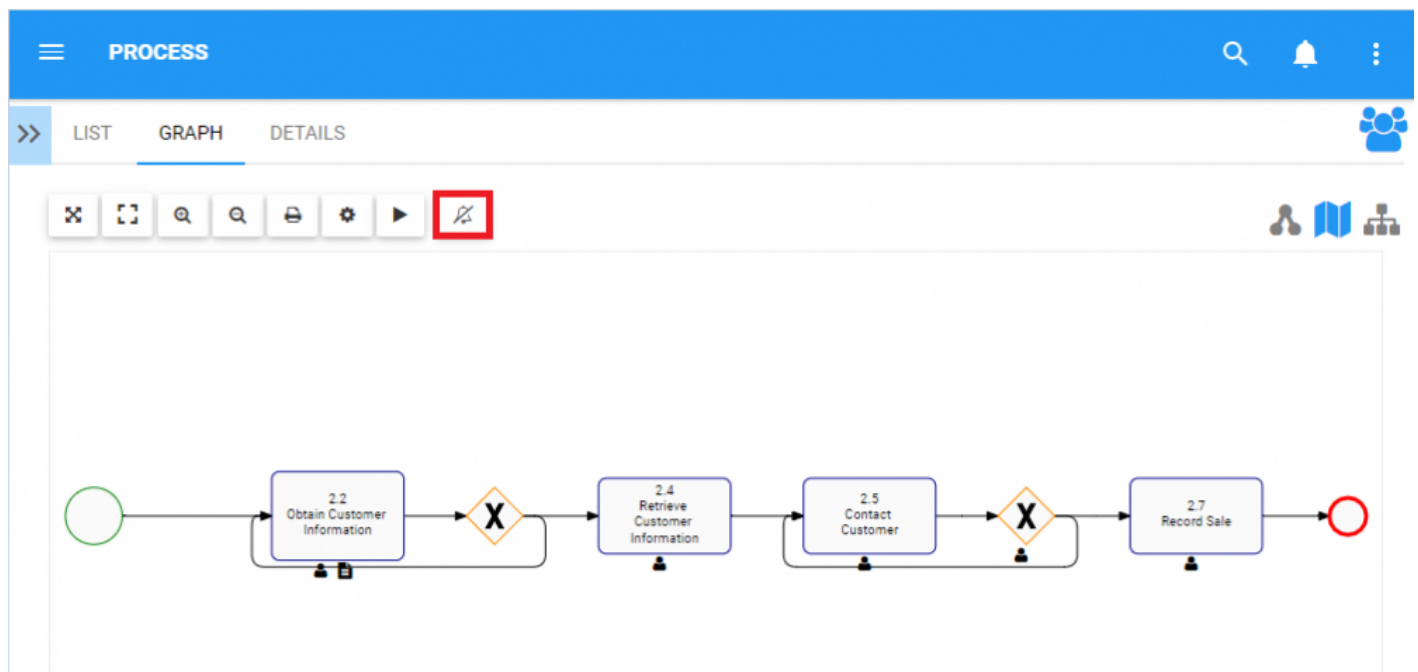
4.4.3.1.1.8 Subscribe


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.

4.4.3.2 Map Graph

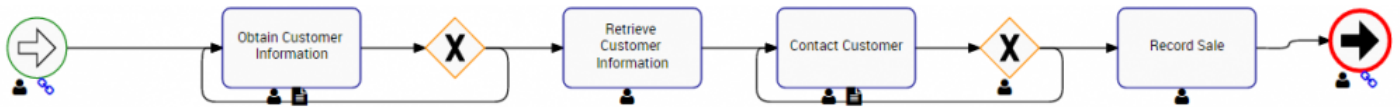
A Map graph represents the typical pictorial view of a business process. It is the most common process viewing format, displaying the process in typical BPMN format. This process view allows users to view business processes, associated activities and items. The EPC provides the following Map view formats:

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.

4.4.3.2.1 Graph View

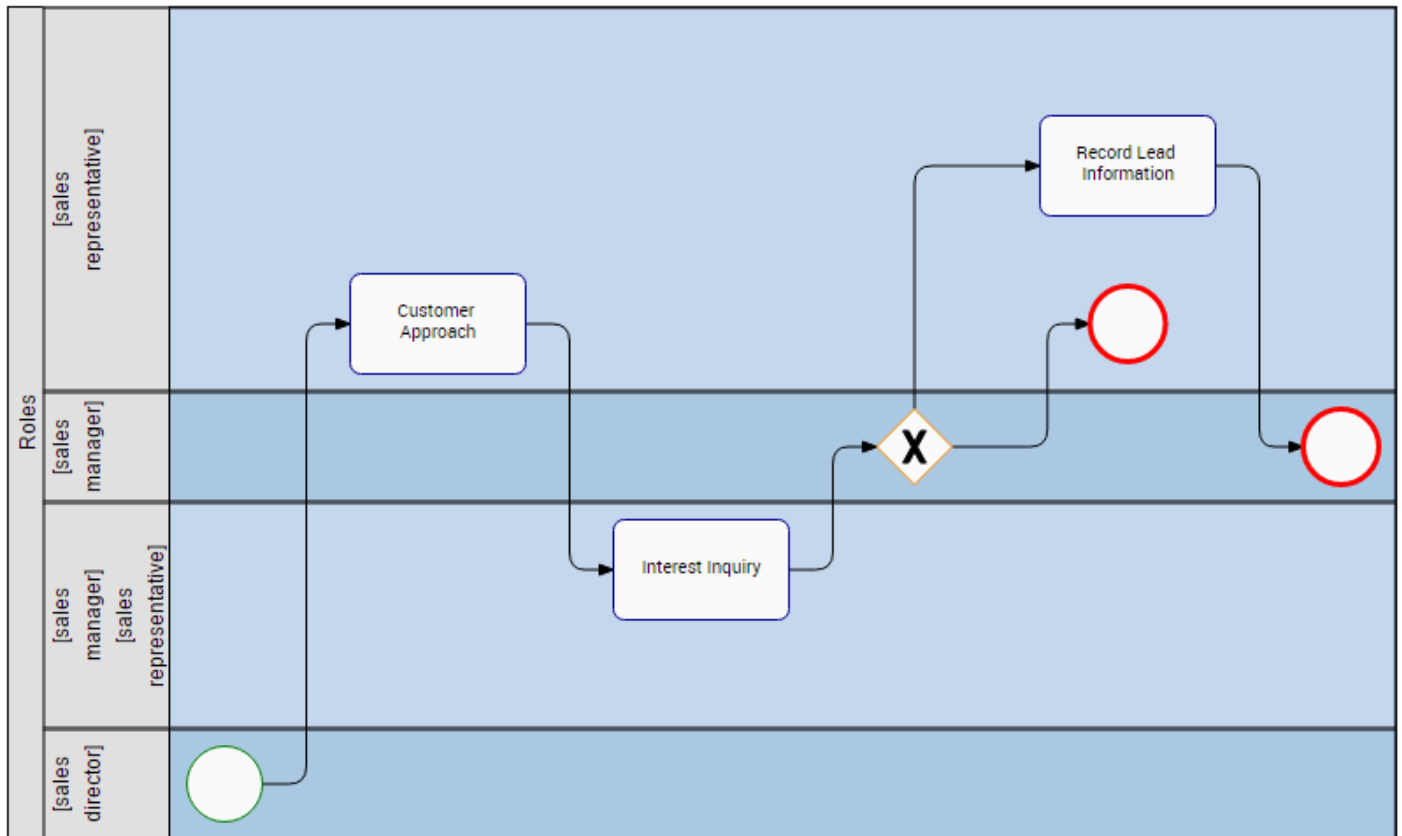
Graph view allows users to view processes following the traditional flow-chart format. This provides users with a high-level view of a business process, outlining key activities and the key items associated with each task.



Exactly what is displayed and how they can be edited is discussed in the [Options](#) section.

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.

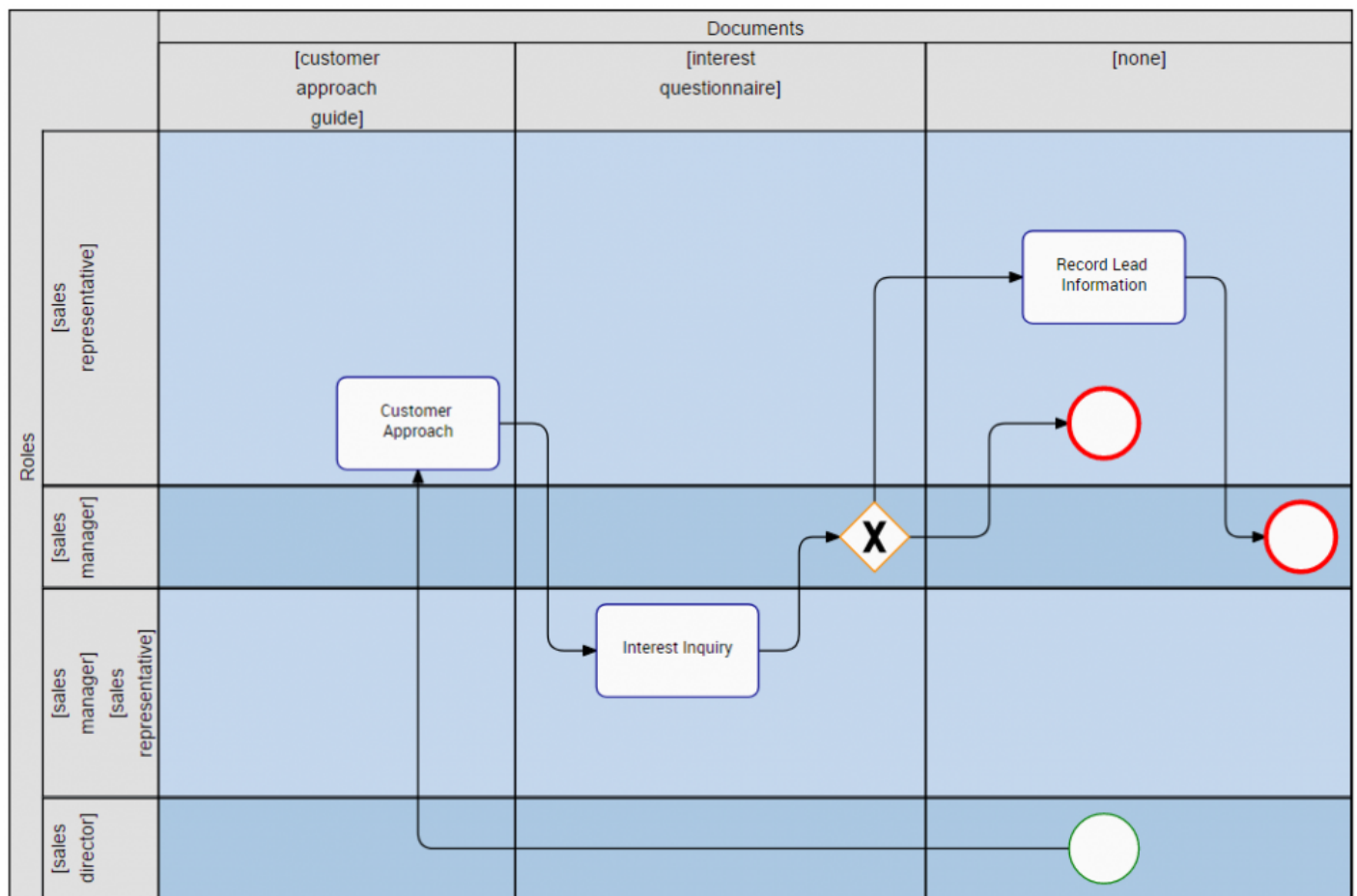
The following Items can be set on the axis:

- Roles
- Assets
- Documents
- Resources
- Org Units
- 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

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:

- Roles
- Assets
- Documents
- Resources
- Org Units

- 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

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

Map options



General



A Display:	GRAPH	▼	G Highlight:	NONE	▼
B Swimlanes Matrix X:	ROLES	▼	H Node Color:	DISABLED	▼
C Swimlanes Matrix Y:	ASSETS	▼	I Performance Color :	DISABLED	▼
D Expand IPL:	DISABLED	▼	J Shape Type:	MODELER DEFAULT	▼
E Sub-Process and Reference Inline Explosion :	DISABLED	▼	K Group by:	NONE	▼
F Dedicated Pools:	DISABLED	▼	L Auto Layout :	ON DEMAND	▼

M RASCI-VS Filter



Roles :	ALL	▼	Assets:	ALL	▼
Resources:	ALL	▼	Org Units:	ALL	▼

N Icons & Annotations

Roles :	ICON	▼	Assets :	ICON	▼
Documents :	ICON	▼	Resources :	NONE	▼
Org Units :	ICON	▼	Risks :	ICON	▼
Rules :	ICON	▼	Controls :	ICON	▼
Objectives :	NONE	▼	Entities :	NONE	▼
Attributes :	NONE	▼	KCI :	NONE	▼
KPI :	ICON	▼	KRI :	NONE	▼
Materials :	ICON	▼	IPL :	ICON	▼
Categories :	NONE	▼	Annotation :	ICON	▼
Boundary Events :	NONE	▼	Description :	ICON	▼
Event & Gateway Name :	NONE	▼	Services :	NONE	▼

Save as Environment Default

Reset to Default

Close


Save changes

Item	Setting	Purpose
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	Shape Type	Allow users to toggle between process viewing formats (BPMN 2.0, Simple BPMN, VSM, Modeler Default)
K	Group By	This section allows users to classify process and flow items into categories (e.g. Core Process vs. Support Process)
L	Auto Layout	Allow users to users to enable auto-layout on demand or have the setting constantly applied
M	RASCI-VS Filter	Allow users to prioritize items being displayed using the RASCI-VS matrix
N	Icons & Annotations	Allow users to dictate which items are displayed and how they are displayed (Icon, Annotation, None)

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

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

1. Select "Options" icon 
2. Navigate cursor to Display bar

Map options



General

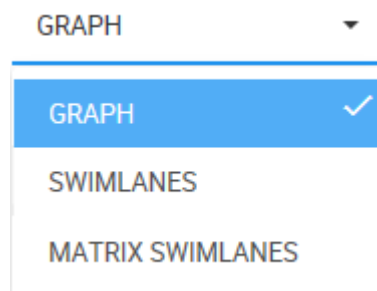
Display:	GRAPH	Highlight:	NONE
Swimlanes Matrix X:	ROLES (3)	Node Color:	DISABLED
Swimlanes Matrix Y:	ASSETS	Performance Color :	DISABLED
Expand IPL:	DISABLED	Shape Type:	BPMN 2.0
Sub-Process and Reference Inline Explosion :	DISABLED	Group by:	NONE
Dedicated Pools:	DISABLED	Auto Layout :	ON DEMAND

RASCI-VS Filter

Icons & Annotations

[Save as Environment Default](#)[Reset to Default](#)[Close](#)[Save changes](#)

3. The following drop-down menu will be generated



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

Map options



General

Display:	GRAPH	Highlight:	NONE
Swimlanes Matrix X:	ROLES (3)	Node Color:	DISABLED
Swimlanes Matrix Y:	ASSETS	Performance Color :	DISABLED
Expand IPL:	DISABLED	Shape Type:	BPMN 2.0
Sub-Process and Reference Inline Explosion :	DISABLED	Group by:	NONE
Dedicated Pools:	DISABLED	Auto Layout :	ON DEMAND

RASCI-VS Filter

Icons & Annotations

[Save as Environment Default](#)[Reset to Default](#)[Close](#)[Save changes](#)

3. The following drop-down menu will be generated

MATRIX SWIMLANES ▼

GRAPH

SWIMLANES

MATRIX SWIMLANES ✓

4. Select Matrix Swimlanes

5. Navigate and select Swimlanes Matrix X bar

Map options



General



Display:	MATRIX SWIMLANES	▼	Highlight:	NONE	▼
Swimlanes Matrix X:	ROLES (3)	▼	Node Color:	DISABLED	▼
Swimlanes Matrix Y:	ASSETS	▼	Performance Color :	DISABLED	▼
Expand IPL:	DISABLED	▼	Shape Type:	BPMN 2.0	▼
Sub-Process and Reference Inline Explosion :	DISABLED	▼	Group by:	NONE	▼
Dedicated Pools:	DISABLED	▼	Auto Layout :	ENABLED	▼

RASCI-VS Filter



Icons & Annotations



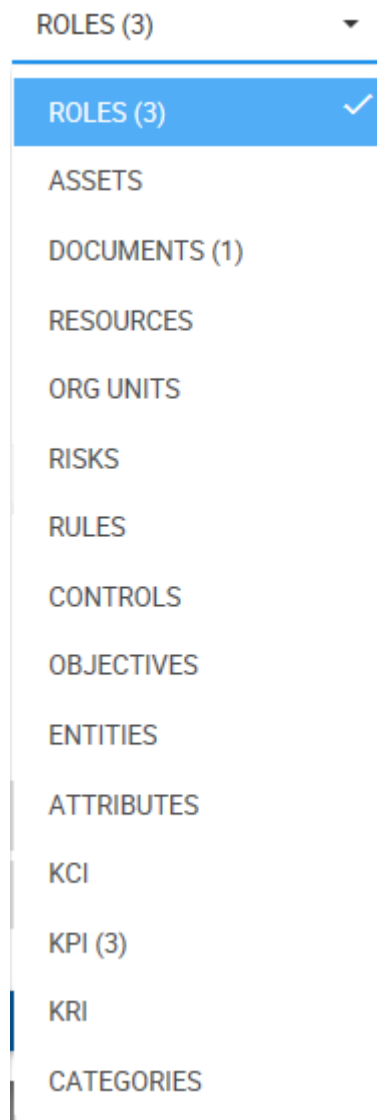
Save as Environment Default

Reset to Default

Close

Save changes

6. The following drop-down menu will be generated



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




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

Map options ×

General –

Display:	<div>GRAPH</div>	Highlight:	NONE	▼
Swimlanes Matrix X:	<div>ROLES (3)</div>	Node Color:	DISABLED	▼
Swimlanes Matrix Y:	<div>ASSETS</div>	Performance Color :	DISABLED	▼
Expand IPL:	<div>DISABLED</div>	Shape Type:	BPMN 2.0	▼
Sub-Process and Reference Inline Explosion :	<div>DISABLED</div>	Group by:	NONE	▼
Dedicated Pools:	<div>DISABLED</div>	Auto Layout :	ON DEMAND	▼

RASCI-VS Filter +

Icons & Annotations +

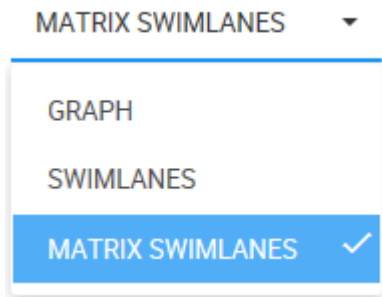
Save as Environment Default

Reset to Default

Close

Save changes

3. The following drop-down menu will be generated



4. Select Swimlanes or Matrix Swimlanes

5. Navigate and select Swimlanes Matrix Y bar

Map options



General



Display:	MATRIX SWIMLANES	▼	Highlight:	NONE	▼
Swimlanes Matrix X:	ROLES (3)	▼	Node Color:	DISABLED	▼
Swimlanes Matrix Y:	DOCUMENTS (1)	▼	Performance Color :	DISABLED	▼
Expand IPL:	DISABLED	▼	Shape Type:	BPMN 2.0	▼
Sub-Process and Reference Inline Explosion :	DISABLED	▼	Group by:	NONE	▼
Dedicated Pools:	DISABLED	▼	Auto Layout :	ENABLED	▼

RASCI-VS Filter



Icons & Annotations

[Save as Environment Default](#)[Reset to Default](#)[Close](#)[Save changes](#)

6. The following drop-down menu will be generated

DOCUMENTS (1) ▼

ROLES (3)

ASSETS

DOCUMENTS (1) ✓

RESOURCES

ORG UNITS

RISKS

RULES

CONTROLS

OBJECTIVES

ENTITIES

ATTRIBUTES

KCI

KPI (3)

KRI

CATEGORIES

MIX RASCI-VS

7. Select the desired item for the Y-axis

* 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.

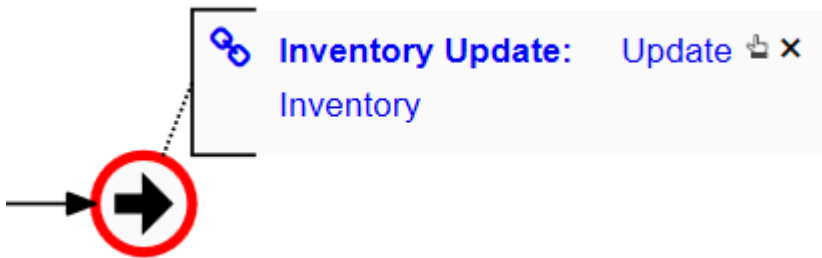
D. Expand IPL: This function allows users to expand Inter-Process Links to view the full implication of a given process.

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. Select “Options” icon 
2. Navigate cursor to Expand IPL bar

Map options

x

General

Display:	GRAPH	▼	Highlight:	NONE	▼
Swimlanes Matrix X:	ROLES	▼	Node Color:	DISABLED	▼
Swimlanes Matrix Y:	ASSETS	▼	Performance Color :	DISABLED	▼
Expand IPL:	ENABLED	▼	Shape Type:	BPMN 2.0	▼
Sub-Process and Reference Inline Explosion :	DISABLED	▼	Group by:	NONE	▼
Dedicated Pools:	DISABLED	▼	Auto Layout :	ON DEMAND	▼

RASCI-VS Filter

+

Icons & Annotations

+

Save as Environment Default

Reset to Default

Close

Save changes

3. The following drop-down menu will be generated

ENABLED ▼

DISABLED

ENABLED ✓

4. Select Enabled

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

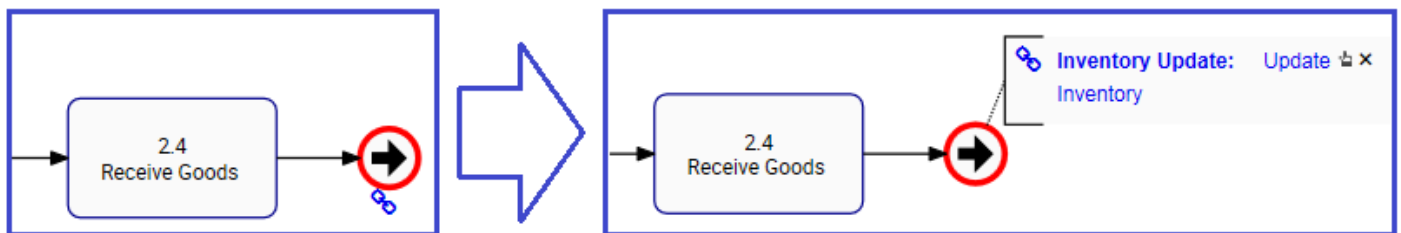


6. Make sure that you have enabled either the IPL icon or IPL annotation in the graph settings.

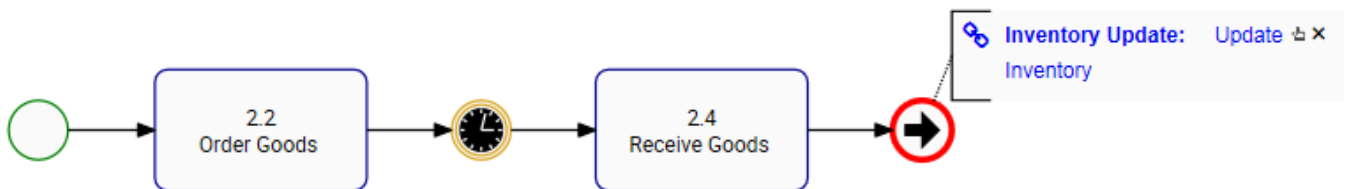
a. If IPL icon is enabled, click on the



icon in order to display the IPL annotation.

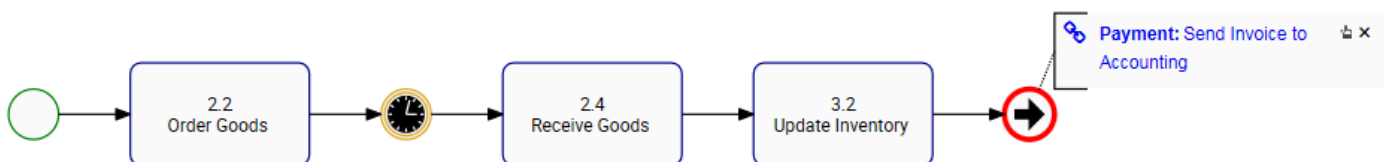


7. Click on the blue text of the IPL annotation.

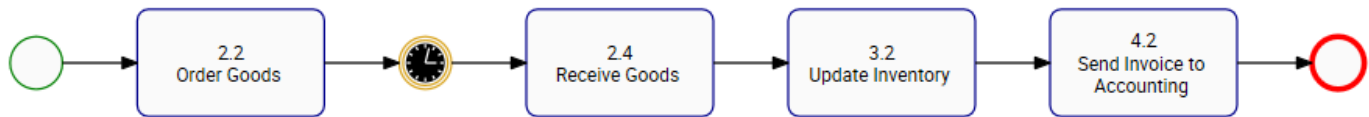


8. The process will now expand to incorporate all flow objects of the linked process.

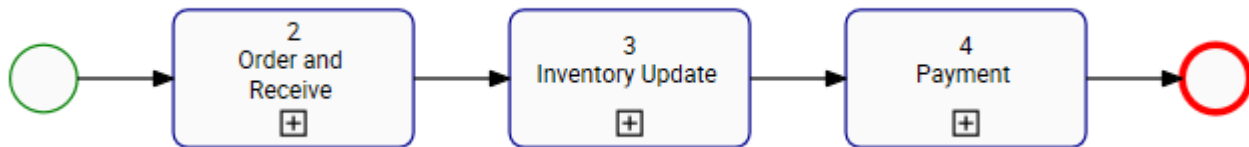
a. You can continue expanding IPL's, click on the "**Payment: Send Invoice to accounting**" of the currently expanded process to expand it to the next linked process.



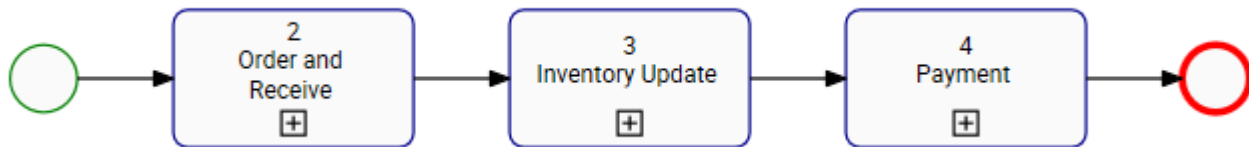
9. The process will now expand to incorporate all flow objects of the linked processes.



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.

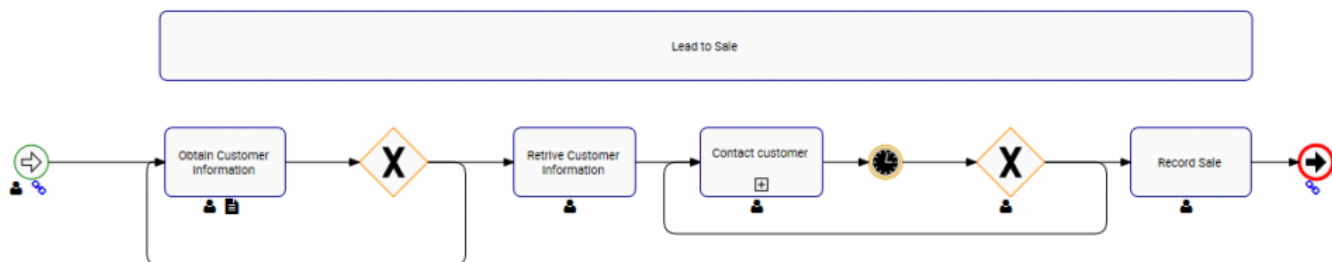
Value Added: Flow objects that add value to the output of the process or organization. Flow objects that are Value Added are manually determined and selected in the EPC Modeler.

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.

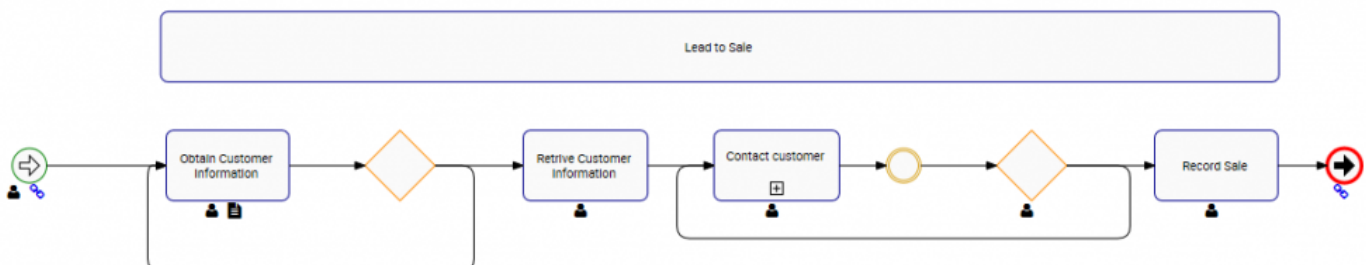
I. Performance Color: If enabled, flow objects will adopt the color (Green, Yellow, or Red) of the associated performance indicator (KPI, KRI, or KCI). If enabled, flow objects will adopt the color (Green, Yellow, or Red) of the associated performance indicator (KPI, KRI, or KCI). See the Performances 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. Shape Type: 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

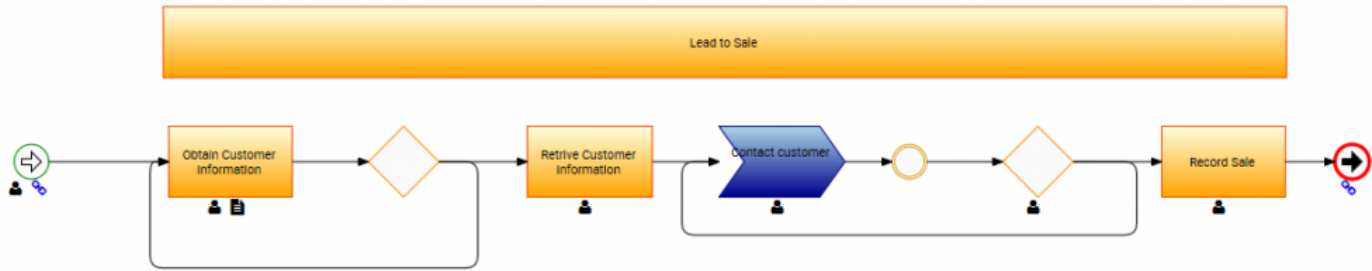
a. BPMN 2.0 (Business Process Modeling Notation)



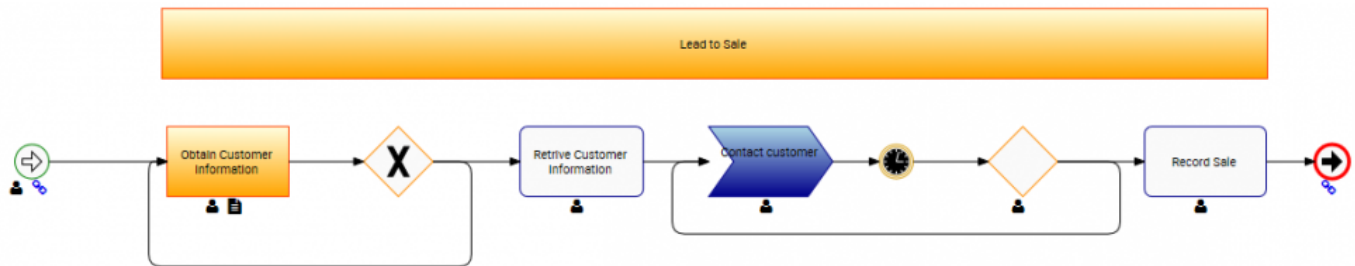
b. Simple BPMN (Business Process Modeling Notation)



c. VSM (Value Stream Mapping)



d. Modeler Default: This view allows users to mix BPMN 2.0, BPMN and VSM shapes



To toggle between Shape Types, please see the steps below:

1. Select "Options" icon



2. Navigate cursor and select Shape Type option

Map options



General



Display:	GRAPH	▼	Highlight:	NONE	▼
Swimlanes Matrix X:	ROLES (6)	▼	Node Color:	DISABLED	▼
Swimlanes Matrix Y:	ASSETS	▼	Performance Color :	DISABLED	▼
Expand IPL:	DISABLED	▼	Shape Type:	BPMN 2.0	▼
Sub-Process and Reference Inline Explosion :	DISABLED	▼	Group by:	NONE	▼
Dedicated Pools:	DISABLED	▼	Auto Layout :	ON DEMAND	▼

RASCI-VS Filter



Icons & Annotations

[Save as Environment Default](#)[Reset to Default](#)[Close](#)[Save changes](#)

3. The following drop-down menu will be generated

BPMN 2.0 ▼

BPMN 2.0 ✓

SIMPLE BPMN

VSM

MODELER DEFAULT

4. Select desired Shape Type

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. Auto Layout: Auto Layout allows users to generate a user friendly layout at the click of a button. Users can enable auto-layout on demand or have the setting constantly applied on processes.

To use the Auto Layout option, please see the steps below:

1. Select “Options” icon 

2. Navigate cursor to Auto Layout

Map options



General



Display:	GRAPH	▼	Highlight:	NONE	▼
Swimlanes Matrix X:	ROLES (6)	▼	Node Color:	DISABLED	▼
Swimlanes Matrix Y:	ASSETS	▼	Performance Color :	DISABLED	▼
Expand IPL:	DISABLED	▼	Shape Type:	BPMN 2.0	▼
Sub-Process and Reference Inline Explosion :	DISABLED	▼	Group by:	NONE	▼
Dedicated Pools:	DISABLED	▼	Auto Layout :	ON DEMAND	▼

RASCI-VS Filter



Icons & Annotations

[Save as Environment Default](#)[Reset to Default](#)[Close](#)[Save changes](#)

3. The following drop-down menu will be generated

ON DEMAND ▼

ON DEMAND ✓

ENABLED


4. Select desired the Auto Layout option to view a process

M. 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

To use the RASCI-VS Filters, please see the steps below:

1. Select "Options" icon 

2. Navigate cursor to Roles

Map options

×

General

+

RASCI-VS Filter

-

Roles :

ALL



Assets:

ALL



Resources:

ALL



Org Units:

ALL



Icons & Annotations

+[Save as Environment Default](#)[Reset to Default](#)[Close](#)[Save changes](#)

3. The following drop-down menu will be generated

ALL

ALL

RESPONSIBLE

ACCOUNTABLE

SUPPORT

CONSULTED

INFORMED





VERIFIER

SIGNATORY

4. Select RASCI-VS filter you want to apply


















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



N. 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	<div> Account Manager [R, A]  </div>
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
	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

Map options

✕

General

+

RASCI-VS Filter

+

Icons & Annotations

-

Roles (6) :	ICON	▼	Assets :	ICON	▼
Documents (1) :	ICON	▼	Resources :	NONE	▼
Org Units :	ICON	▼	Risks :	ICON	▼
Rules :	ICON	▼	Controls :	ICON	▼
Objectives :	NONE	▼	Entities :	NONE	▼
Attributes :	NONE	▼	KCI :	NONE	▼
KPI :	ICON	▼	KRI :	NONE	▼
Materials :	ICON	▼	IPL (2) :	ICON	▼
Categories :	NONE	▼	Annotation :	ICON	▼
Boundary Events :	NONE	▼	Description :	ICON	▼
Event & Gateway Name :	NONE	▼	Services :	NONE	▼

Save as Environment Default

Reset to Default

Close

Save changes

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

Map options

✕

General

+

RASCI-VS Filter

+

Icons & Annotations

-

Roles (6) :	ICON	▼	Assets :	ICON	▼
Documents (1) :	ICON	▼	Resources :	NONE	▼
Org Units :	ICON	▼	Risks :	ICON	▼
Rules :	ICON	▼	Controls :	ICON	▼
Objectives :	NONE	▼	Entities :	NONE	▼
Attributes :	NONE	▼	KCI :	NONE	▼
KPI :	ICON	▼	KRI :	NONE	▼
Materials :	ICON	▼	IPL (2) :	ICON	▼
Categories :	NONE	▼	Annotation :	ICON	▼
Boundary Events :	NONE	▼	Description :	ICON	▼
Event & Gateway Name :	NONE	▼	Services :	NONE	▼

Save as Environment Default

Reset to Default

Close

Save changes

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



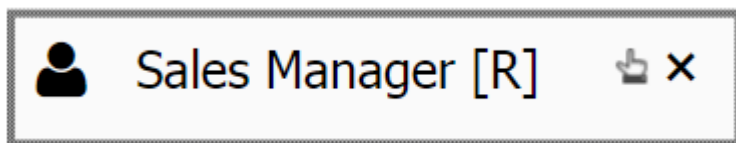
5. Select the desired notation and click the “Save Changes” at the bottom right of the page.

How to Re-Organize Annotations

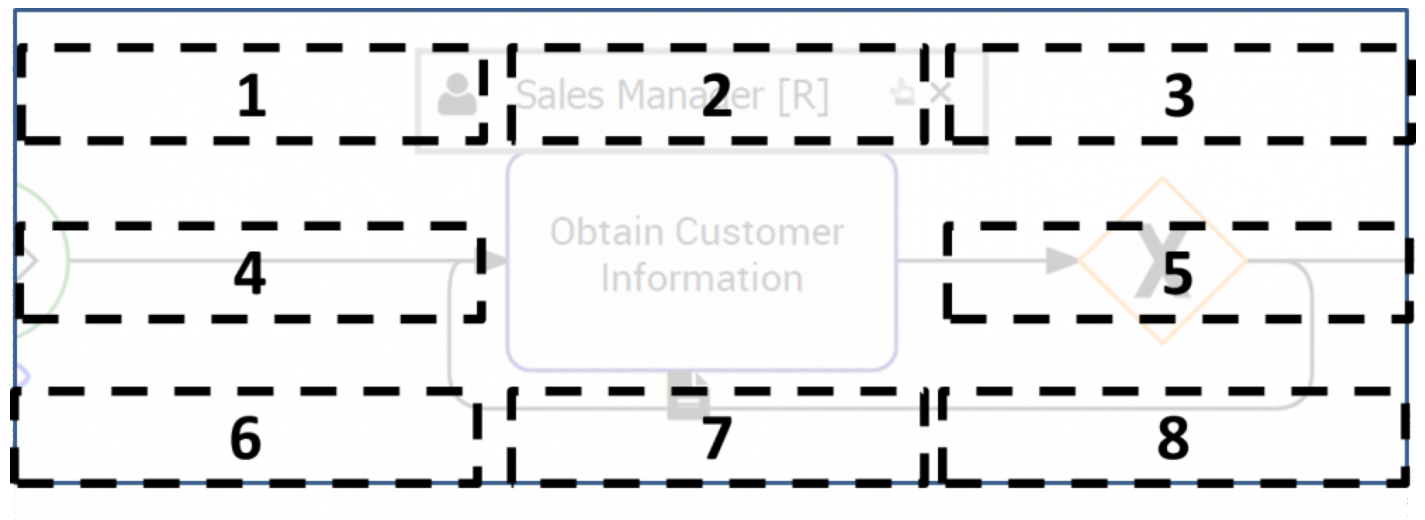
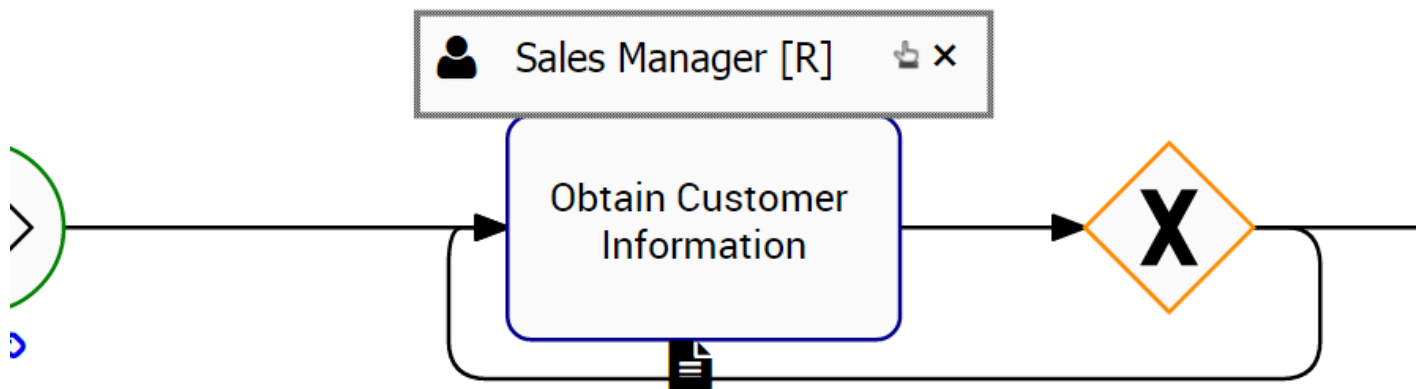
The EPC allows users to shift the position of Annotations within a Graph to optimize viewing capabilities. Users can reorganize annotations based on a **pre-set placement** options, or personalize their map through **personalized map customization**.

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



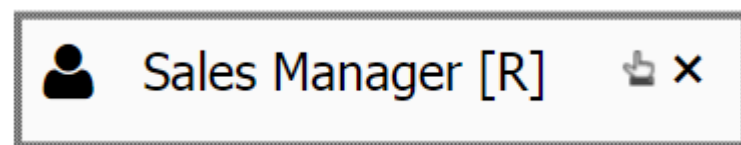
3. A user can select 1 of 8 positions to move the annotation. The graphic below highlights the 8 available options




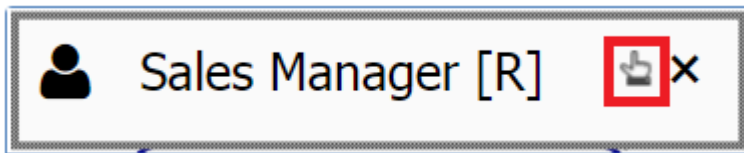
4. Click and hold the Annotation. Drag it to the desired location



To use **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




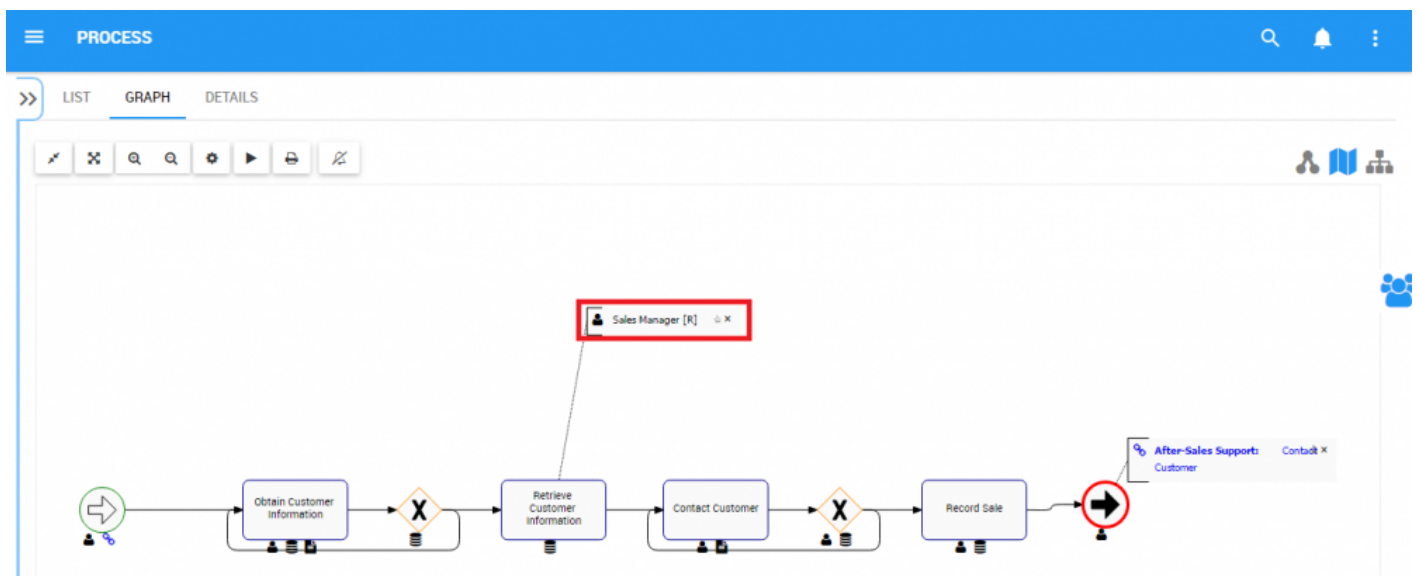
3. Select the  icon **once** located on the right hand side of the annotation




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.




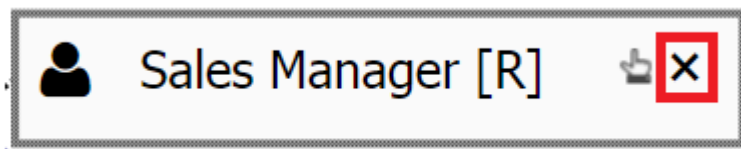
 It is recommended that users select the layout that minimizes overlapping objects


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

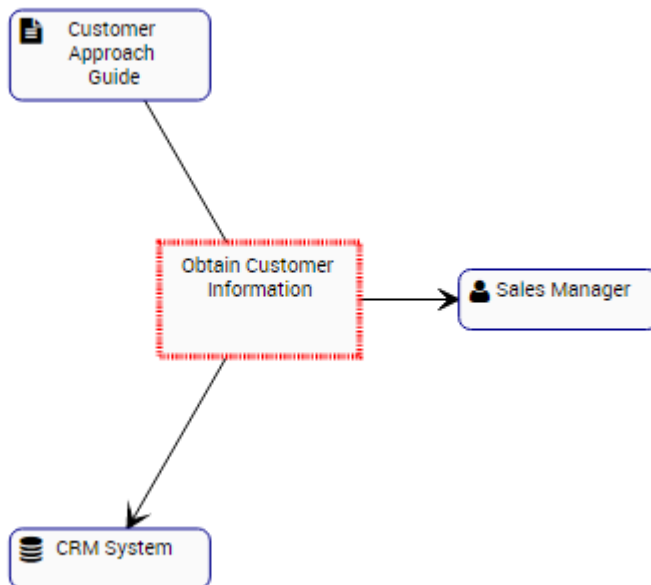


✿ Document icons allow users to preview the electronic documents uploaded in the EPC. The “Preview” button is symbolized by  icon. Simply click on the icon to preview the document.

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.

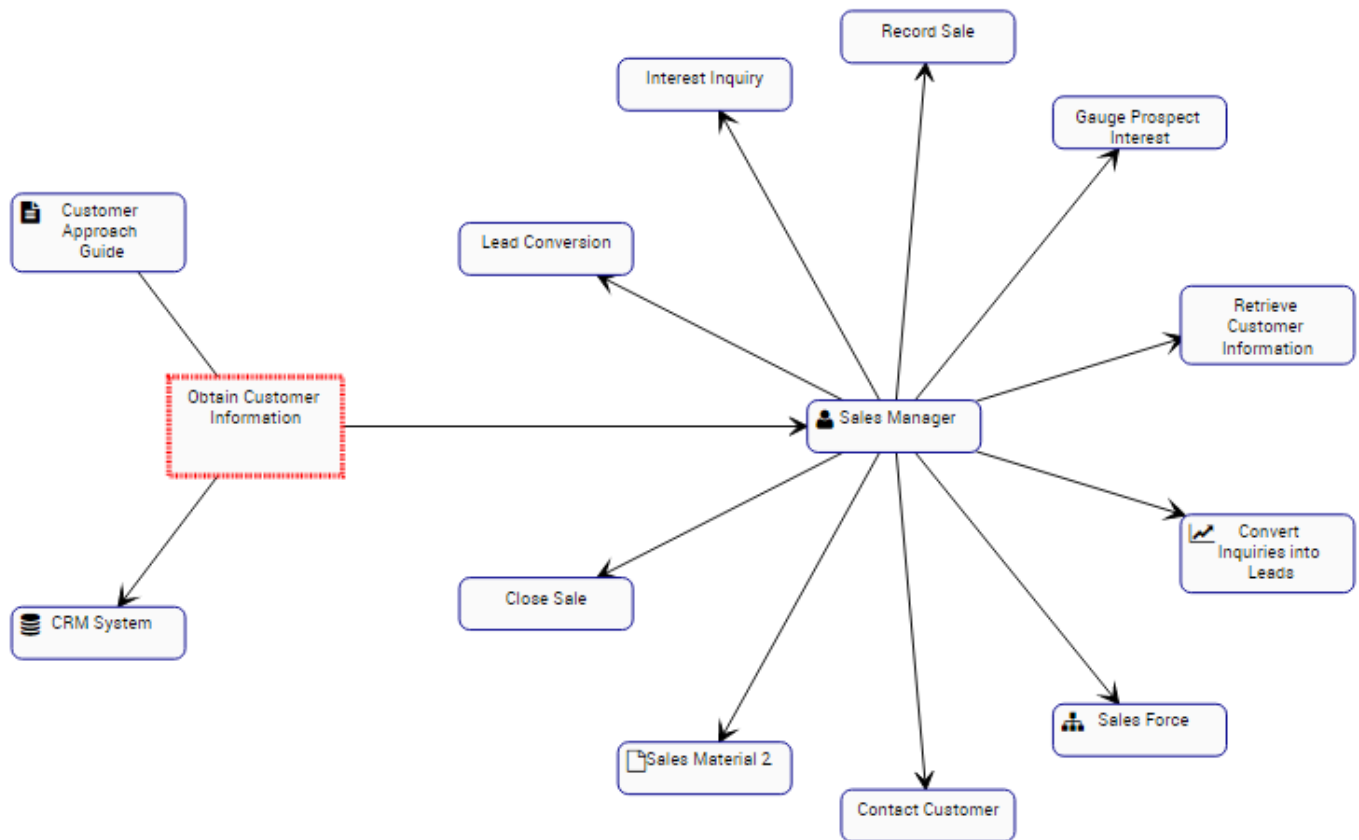
Impact Graph



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.

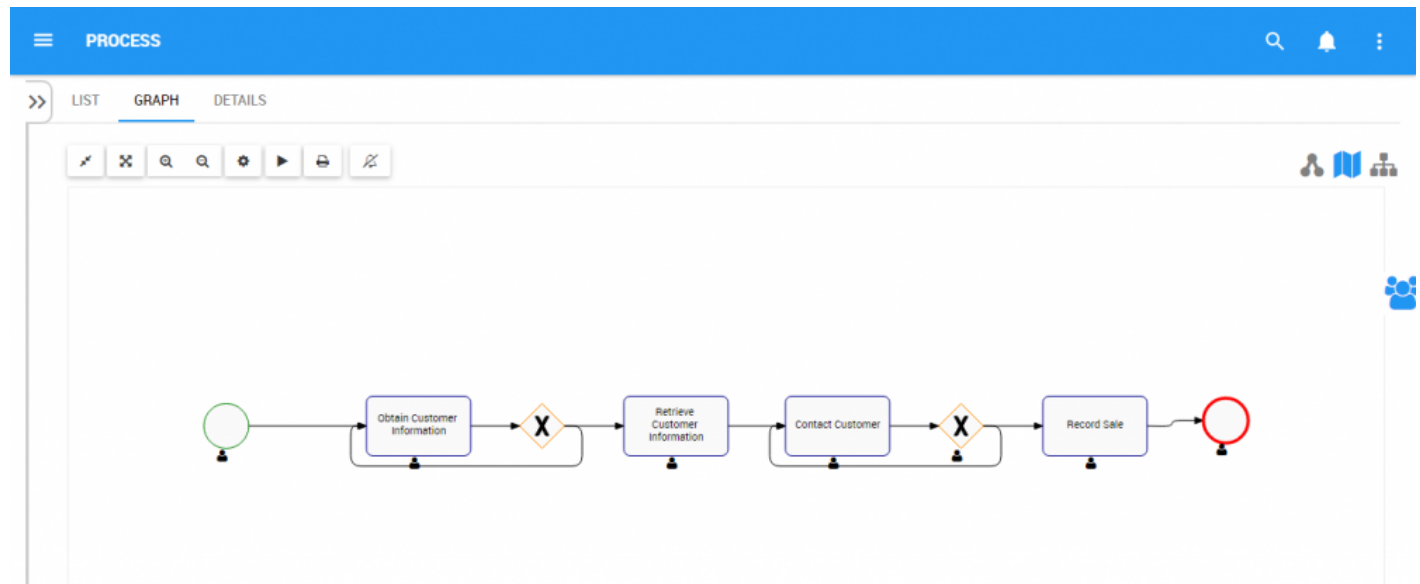


These Impact Graphs can be used to educate business users, to analyze internal business processes and help management optimize activities effectively. Additionally, they help in the preparation of change management plans, allowing managers to map out the effect of any organizational change.

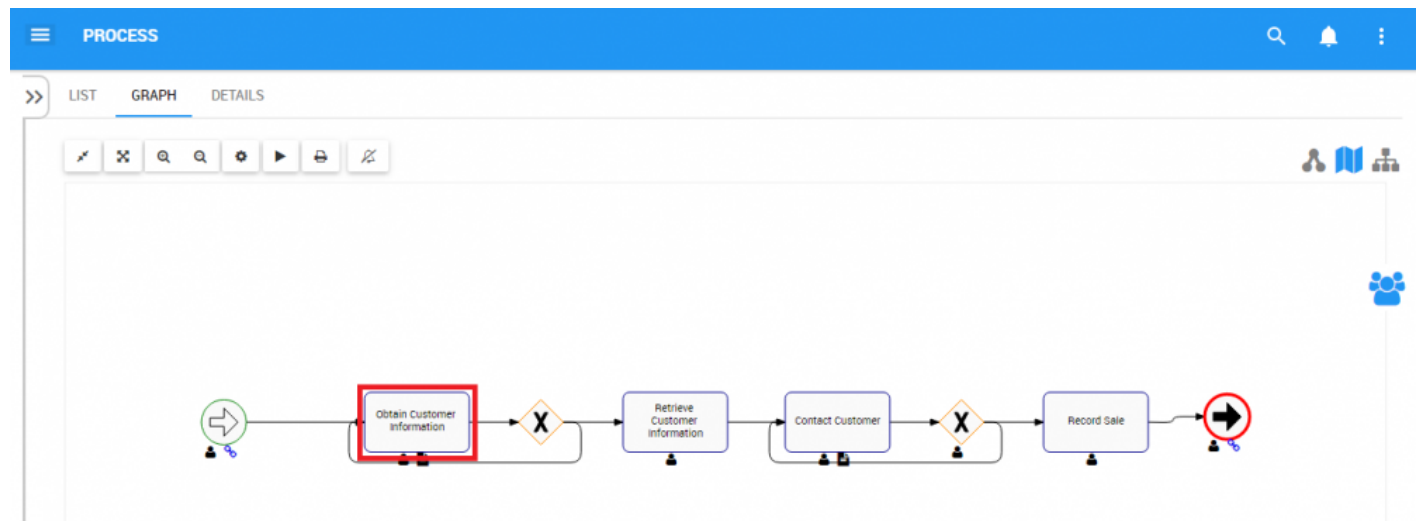
Impact Graph Navigation

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

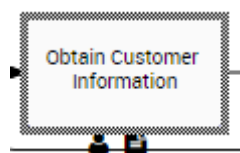
1. Navigate to the Graph tab




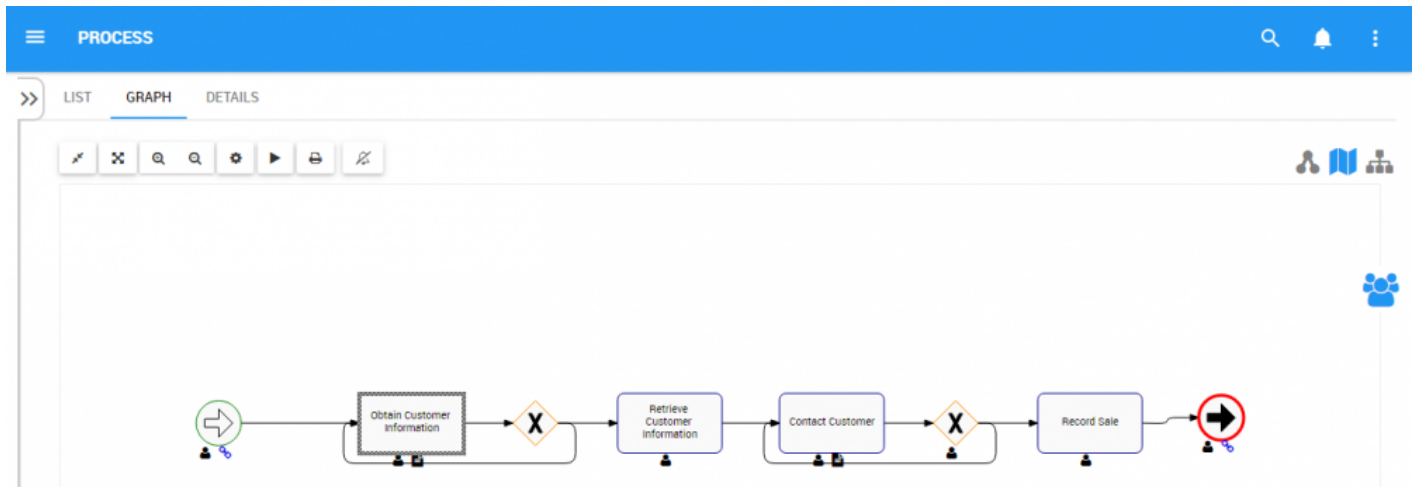
2. By default, a user will be navigated to the Processes Map Graph. To view a specific item's Impact Graph, a user must **select** the item prior to navigating to the Impact Graph view. For this example, we will select "Obtain Customer Information" task by clicking on the item



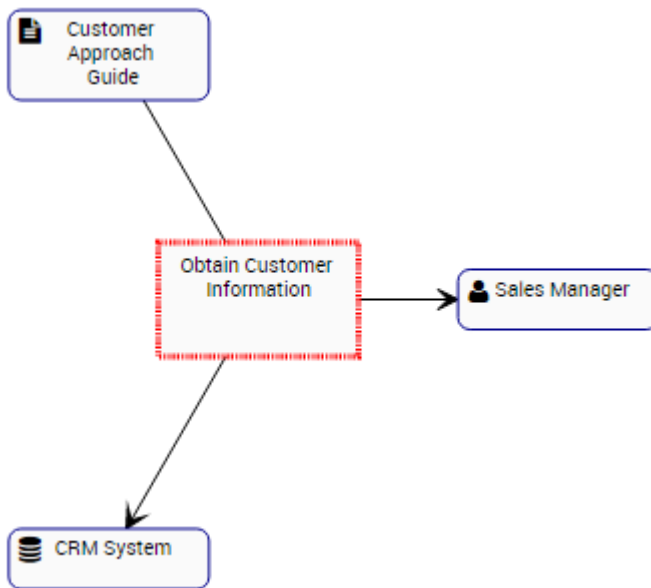
3. Once the item is selected it will be highlighted and will display the following



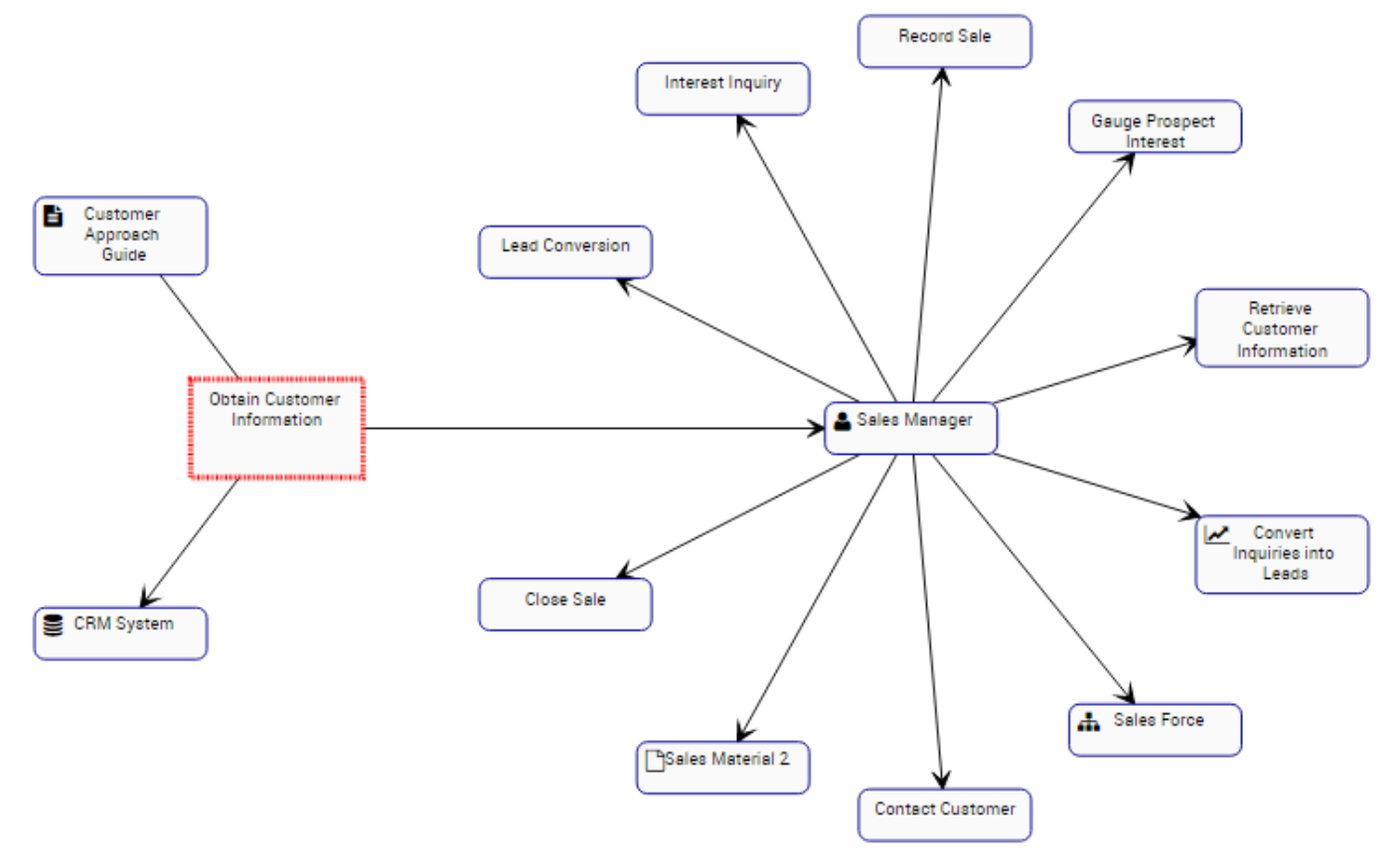
4. Now select the Impact Graph icon 



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



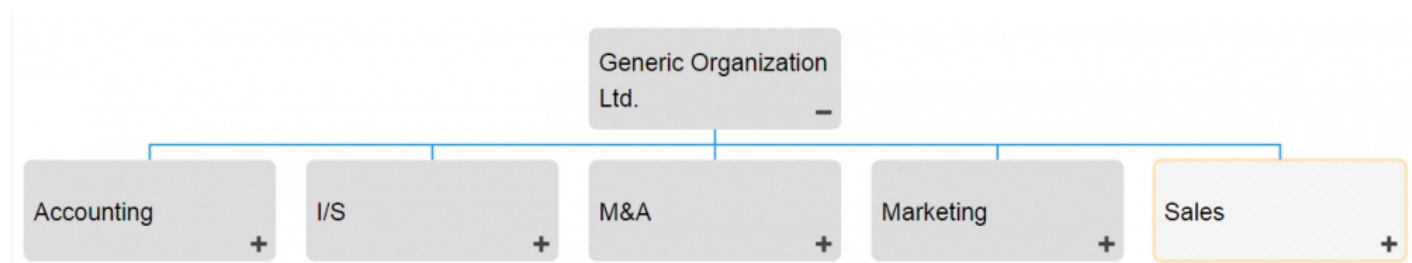
6. (Optional) To further expand the Impact Graph, simply double-click on the item you would like to expand



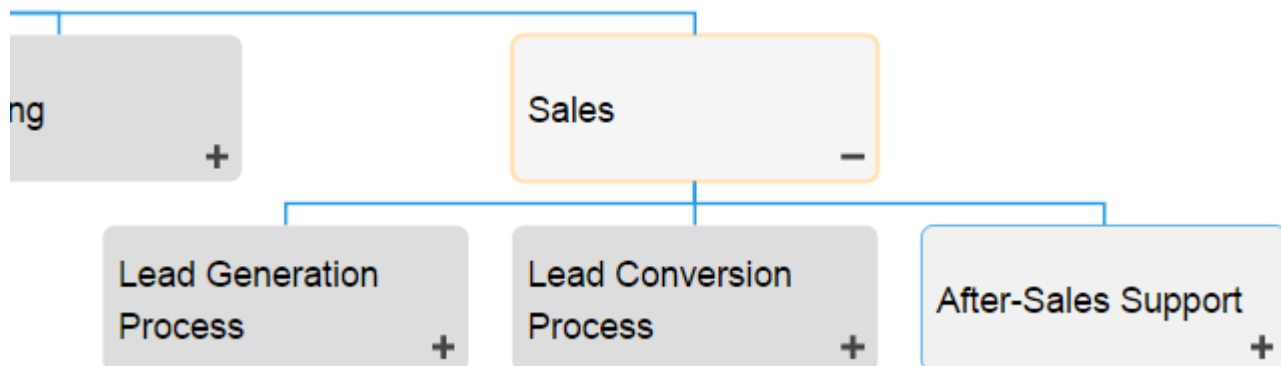
4.4.3.4 Hierarchy Graph

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.


* 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”

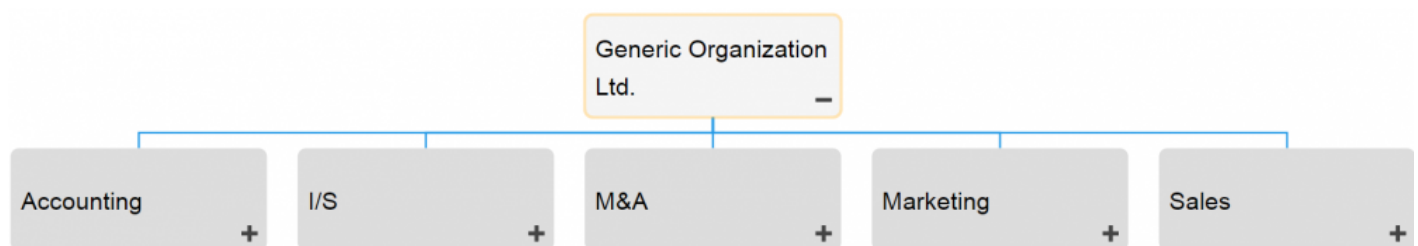
3. By default, you will be navigated to Map view. To select Hierarchy Graph view, select the  icon.

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.


Generic Organization
Ltd.

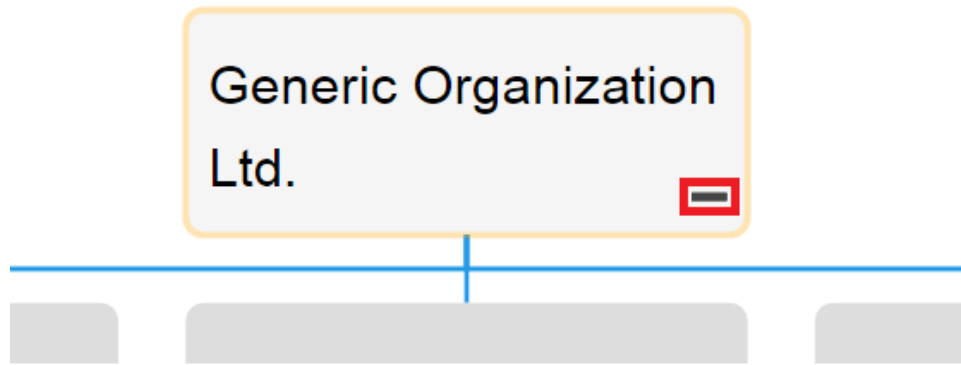


5. To further expand components of the Hierarchy Graph, double click on the  on the objects in the Graph. This will expand the item selected.



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

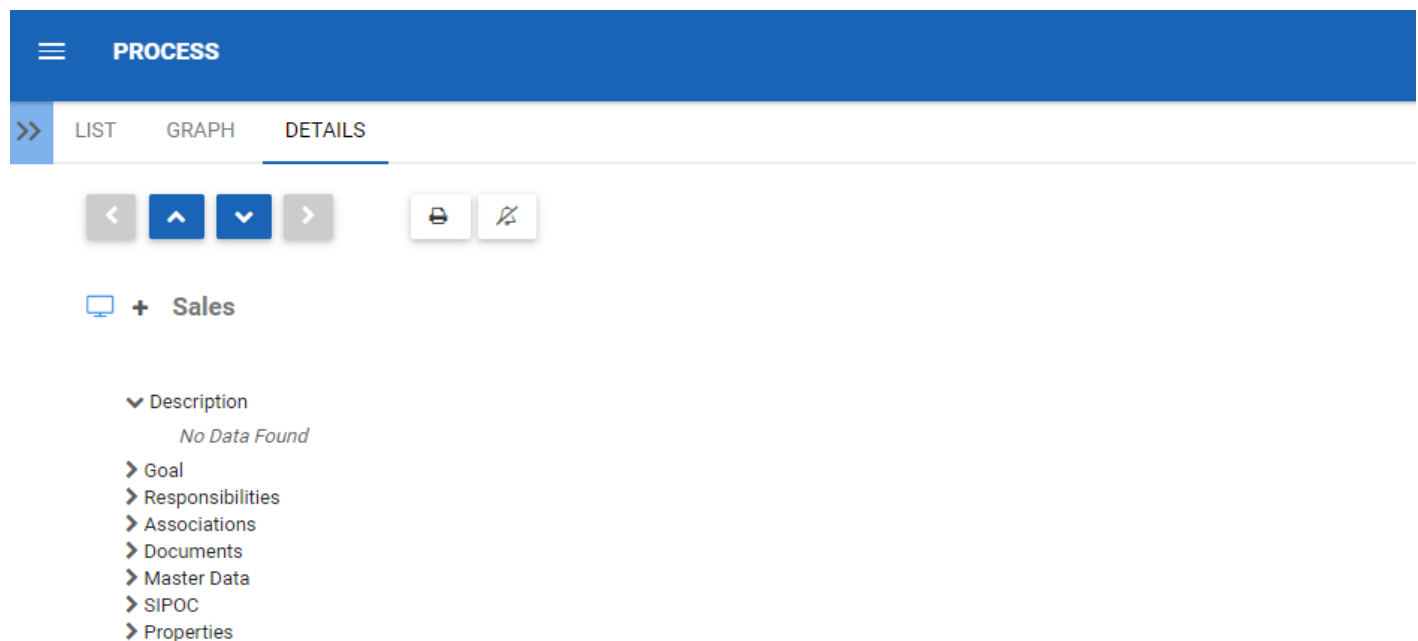
7. To close opened items, double-click on the  icon



4.4.4 Details

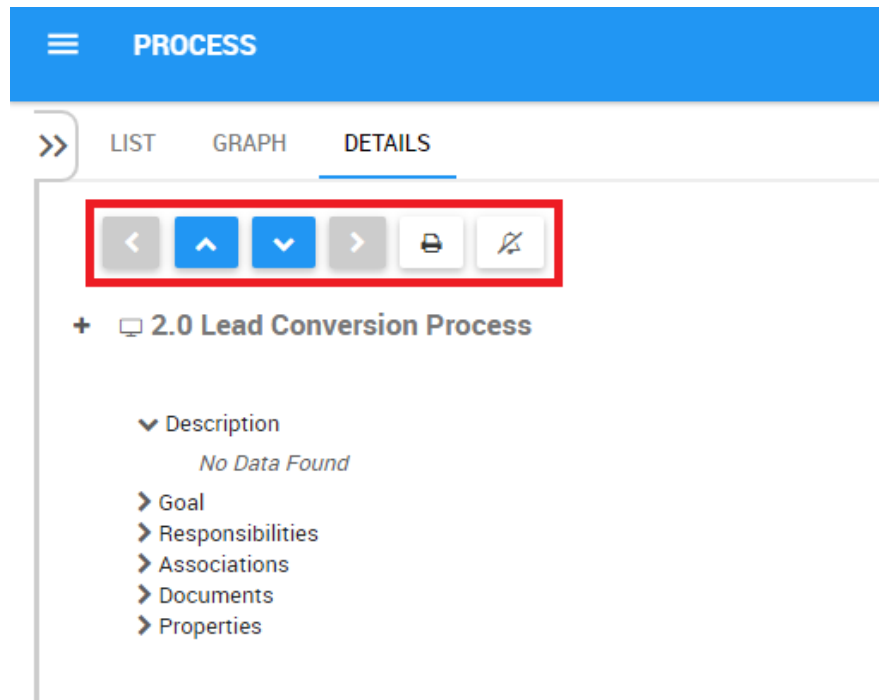
The Description section is where you will find details about the process or flow object you are observing. This rich text area allows for the display of all additional details that has been uploaded regarding the item in particular. These details provide users with all critical information about items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

 **PROCESS**

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

  **2.0 Lead Conversion Process**

▼ Description

No Data Found

➤ Goal

➤ Responsibilities








➤ Associations

➤ Documents

➤ Properties

4.4.4.1.1 Toolbar

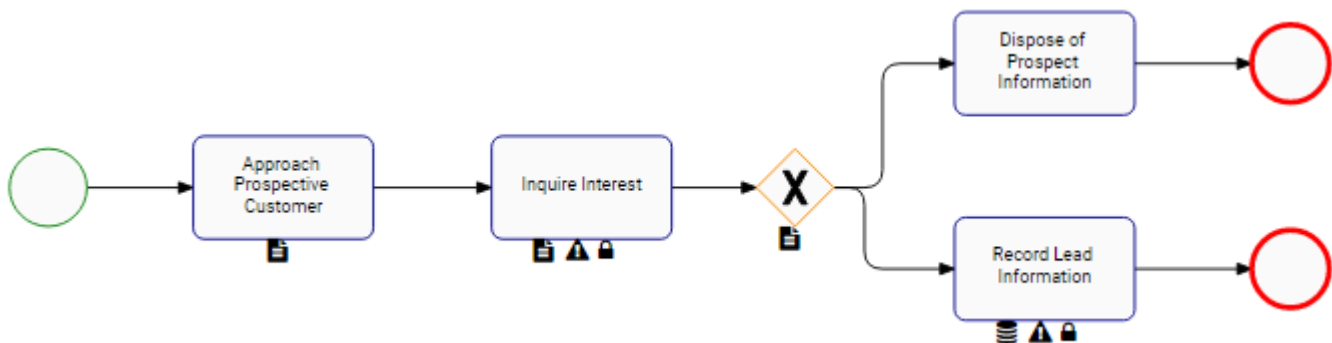
The toolbar provides users with a variety of functions to navigate and leverage the details page.

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.

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.

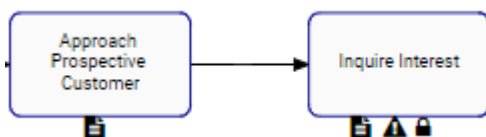


A user can navigate directly from the Details page of “Customer Approach” directly to “Interest Inquiry” and vice versa.

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.



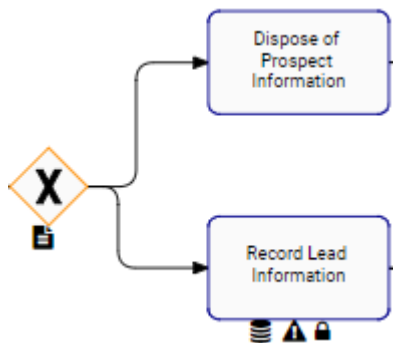
Please see the following instructions to use the Value-Stream Navigation arrows in a Single Navigation Path:

1. Navigate to Graph View

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.

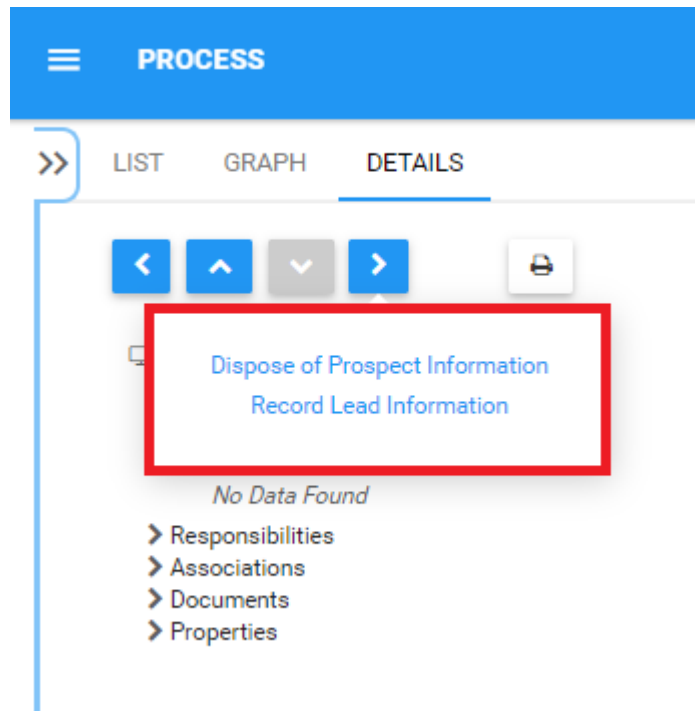


Please see the following instructions to use the Value-Stream Navigation arrows in a Multiple Navigation Paths:

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





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.



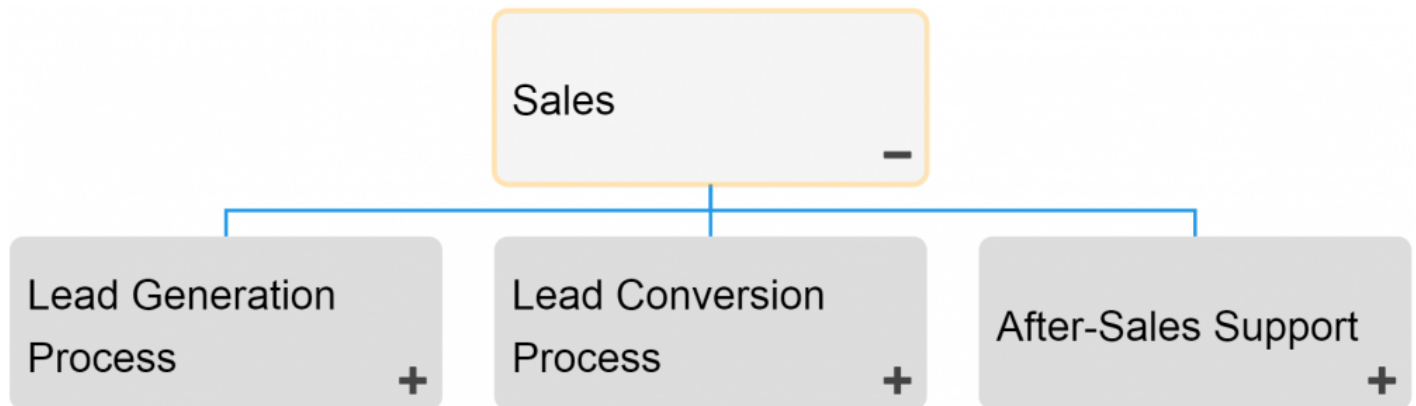
The arrows will only be enabled if there is an additional item within the process to navigate to. If a user selects an item at the end of a process, then the user will not be able to further navigate right and will have the right arrow disabled.


4.4.4.1.1.2 Hierarchy Navigation


Hierarchy Navigation allows users to navigate vertically from item to item without exiting the details page.

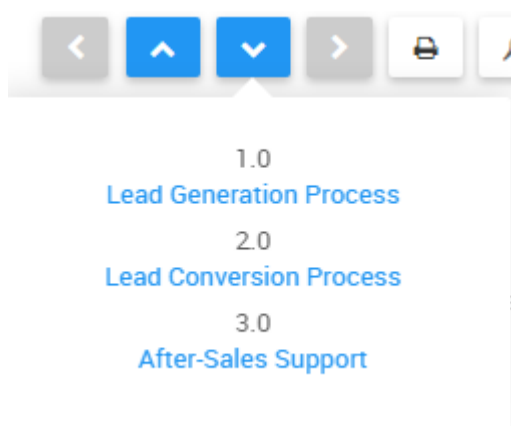
Using the  and  buttons, users can navigate from process sets to processes, processes to sub-processes, and so on. The hierarchy follows the format that can be viewed in the **Hierarchy Graph**.

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.

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.

4/18/2017



Interfacing EPC

Lead Conversion Process

04/18/2017


2.0 Lead Conversion Process



▼ Description

No Data Found

- Goal
- Responsibilities
- Associations
- Documents
- Properties


4.4.4.1.1.4 Subscribe

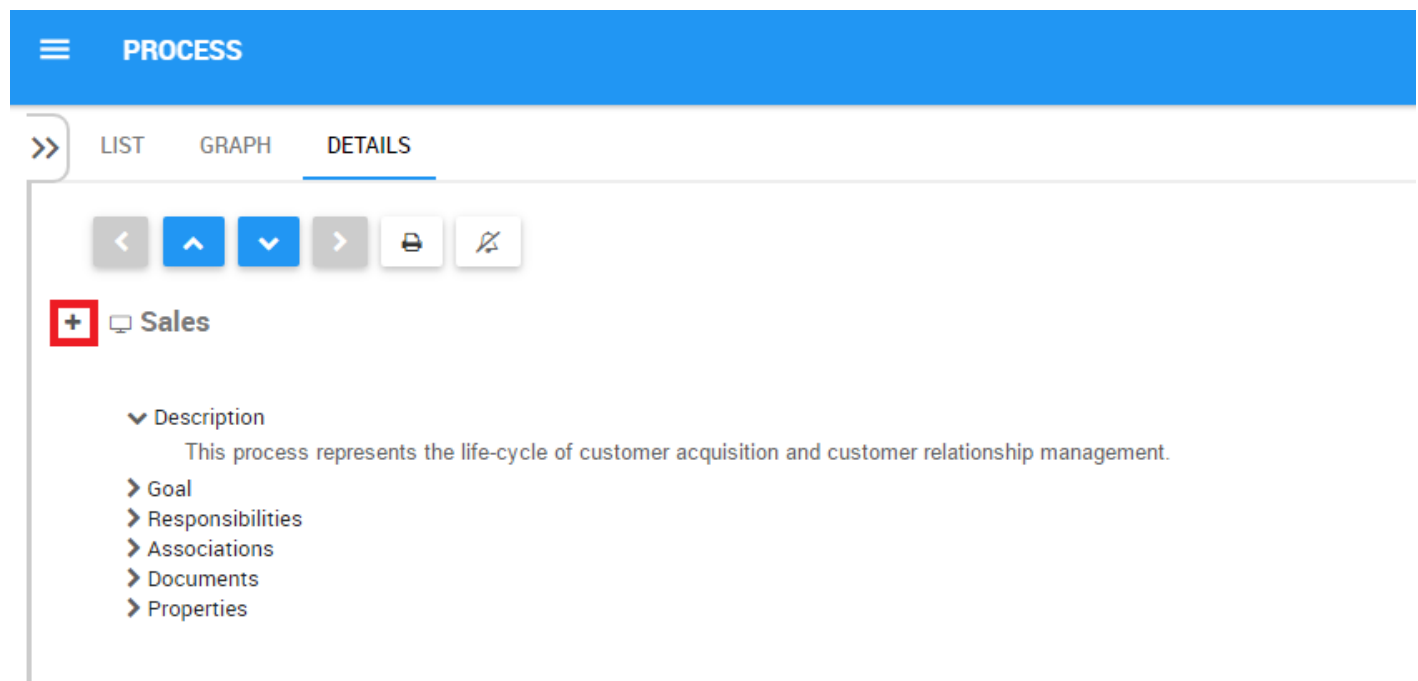
The subscribe function, symbolized by the  icon, has been added to allow users to track items, objects and processes in the EPC. Users can subscribe to specific items or processes to simplify and centralize monitoring activities. By subscribing to items, users will receive notifications when items or 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 .

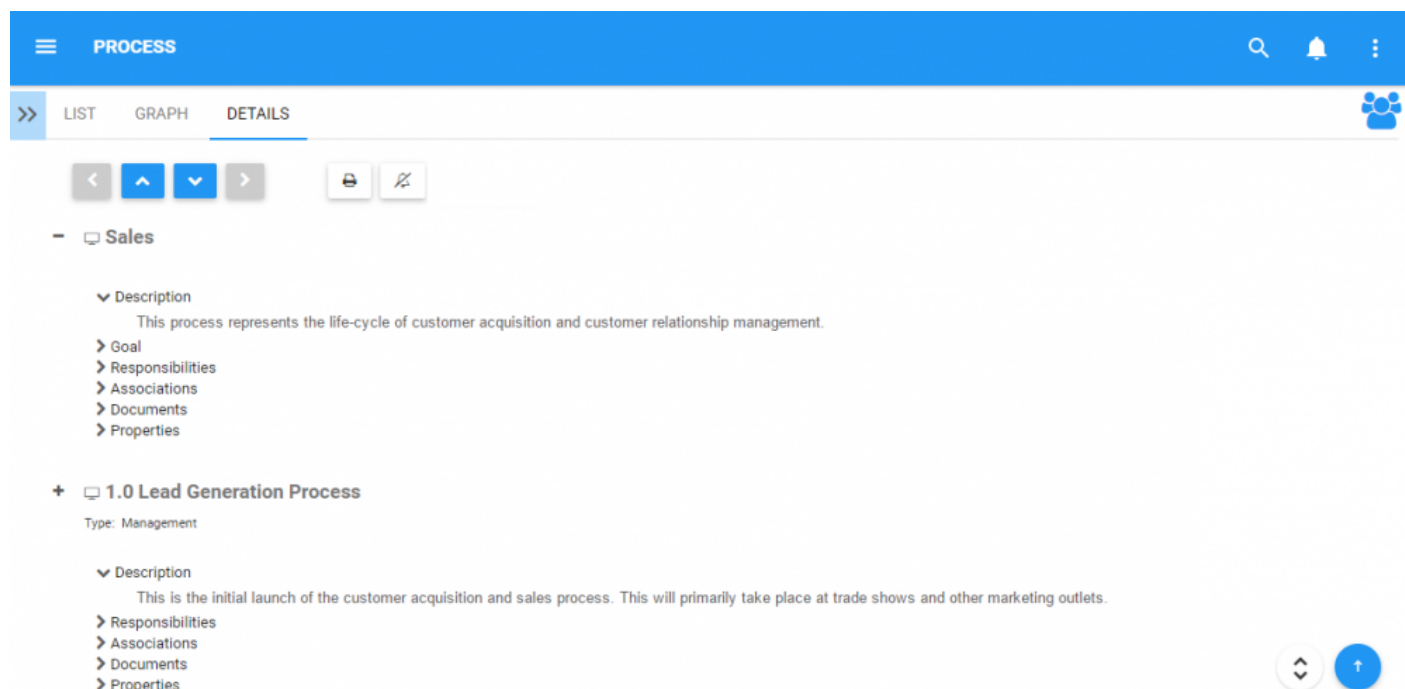
4.4.4.1.2 Details Drilldown

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:



PROCESS

SEARCH NOTIFICATIONS USER

>> LIST GRAPH DETAILS

< ^ v > [Print] [Edit]

- Sales

- ▼ Description
This process represents the life-cycle of customer acquisition and customer relationship management.
- ▶ Goal
- ▶ Responsibilities
- ▶ Associations
- ▶ Documents
- ▶ Properties




+ 1.0 Lead Generation Process

Type: Management

- ▼ Description
This is the initial launch of the customer acquisition and sales process. This will primarily take place at trade shows and other marketing outlets.
- ▶ Responsibilities
- ▶ Associations
- ▶ Documents
- ▶ Properties

⬆ ⬆

* 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.

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.

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.

4.4.4.2.3 Responsibilities

The Responsibilities section displays the 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.

▼ Responsibilities

▼ Roles

 [Account Manager \[R \]](#)

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.

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 as 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.

▼ Documents






 [Interest Questionnaire \(DOCX\)](#)  

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:

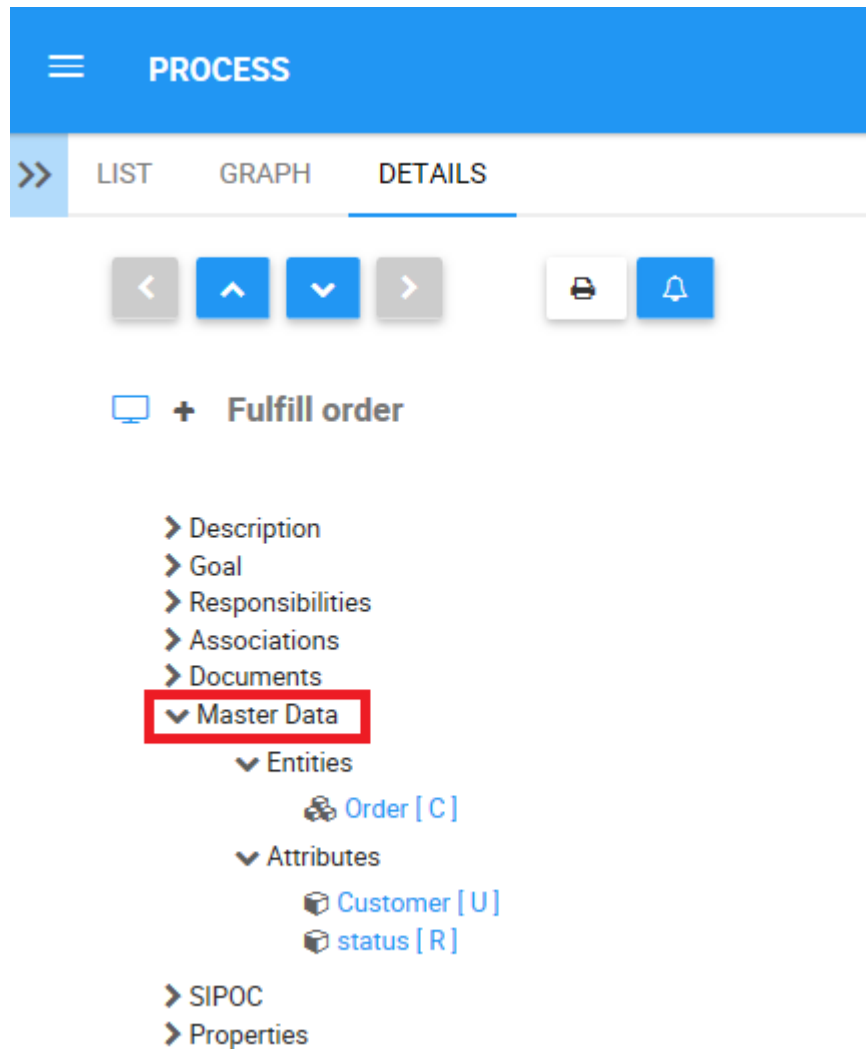
					
PDF Files	Available with extension Adobe Acrobat	Available with extension Adobe Acrobat	Available with extension Adobe Acrobat	Available with extension Adobe Acrobat	Available with extension Adobe Acrobat
Image Files • Png • Jpeg, jpg • Gif • Svg, svgz • Tif, tiff •	Available (all)	Available (all)	Available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

4.4.4.2.6 Master Data

The Master Data section provides users with information about the Entities and Attributes that are linked to the process as well as their level of CRUD (Create, read, update, delete).



4.4.4.2.7 SIPOC

The SIPOC section enables users to analyze the process with a SIPOC table. The SIPOC table is a new addition to the EPC enabling users to better analyze processes and allowing continuous improvement.

The SIPOC table is used by companies when they are unsure what happens exactly throughout a process. For example, analysts of a company know the process and the outputs; however, they don't know the inputs needed for the process. The SIPOC table will enable the users to figure out what are the inputs needed for a specific process.

The SIPOC table is also used by companies to analyze all the elements of a process improvement project. For example, using the SIPOC table, the analyst figures out that the inputs are equal to the outputs of a process. He can then go on with a process improvement project to bring value to the process.

Supplier	Users can view the entity that provides input(s) to a process
Inputs	Users can view all that is used to produce one or more outputs from a process
Processes	Users can view the steps or activities carried out to convert inputs to one or more outputs
Outputs	Users can view the outputs emerging from a process
Customers	Users can view the entity that uses the outputs generated from the process

PROCESS

LIST GRAPH DETAILS

Invoice Approval

- Description
- Goal
- Responsibilities
- Associations
- Documents
- Master Data
- SIPOC**

Supplier	Inputs	Processes	Outputs	Customers
Need for Invoice	Invoice State: Not processed Quantity: 1	Process Invoice	Invoice State: Processed Quantity: 1	Review Invoice for Compliance
Process Invoice	Invoice State: Processed Quantity: 1	Review Invoice for Compliance	Invoice State: Reviewed Quantity: 1	Does invoice meets requirements?
Perform Invoice corrections	Invoice State: Sent for review Quantity: 1	Review Invoice for Compliance	Invoice State: Reviewed Quantity: 1	Does invoice meets requirements?
Review Invoice for Compliance	Invoice State: Reviewed Quantity: 1	Does invoice meets requirements?	Invoice State: Not approved Quantity: 1 Invoice State: Approved Quantity: 1	Perform Invoice corrections Invoice Approved
Does invoice meets requirements?	Invoice State: Not approved Quantity: 1	Perform Invoice corrections	Invoice State: Sent for review Quantity: 1	Review Invoice for Compliance

Properties

4.4.4.2.8 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.

▼ Properties

▼ Version

Version Number: 2.03
Last Modified: 5 days ago

▼ Analysis

Cost:	0.0 USD
Delay:	0 00:00:00
Duration:	0 00:00:00

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.

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.

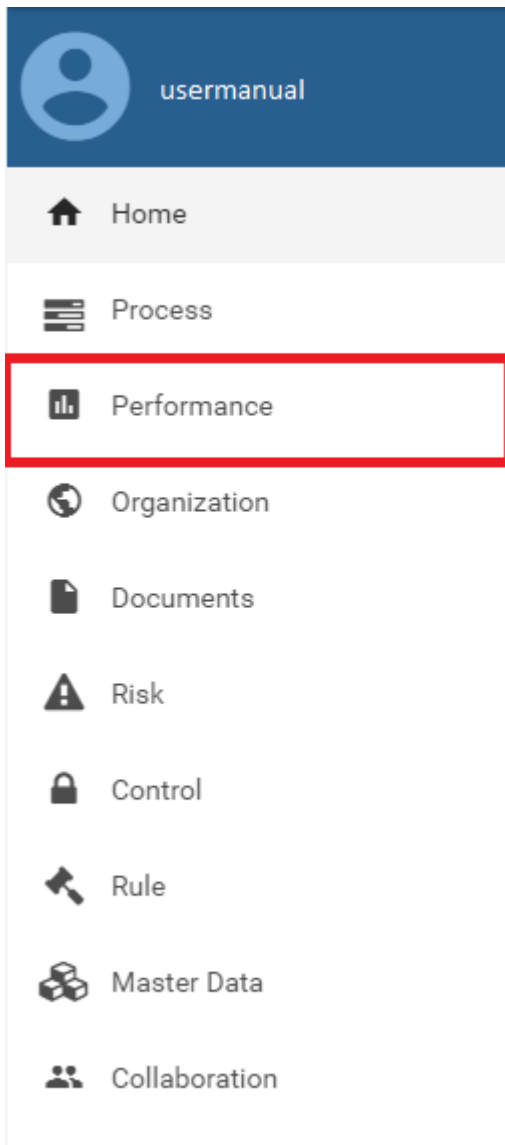
*How to access the Performance module:

*

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



2. Click on *Performance *



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

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).

PERFORMANCE										
<div> <div>>></div> <div>LIST</div> <div>GRAPH</div> <div>DETAILS</div> </div>										
Favorite	Name ▲	Role	Documents	Description	Type	Value	Unit	Color	Modified Date	
	HR Performance Measures				Measure set				04-May-2017	
	IT Performance Measures				Measure set				04-May-2017	
	M&A Targets				Measure set				04-May-2017	
	Sales Targets				Measure set				13-Apr-2017	

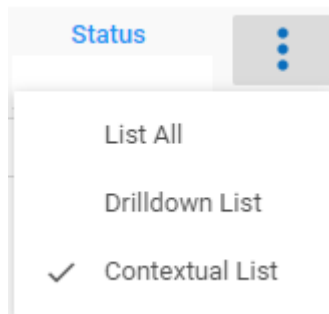
To simplify performance viewing; users **are not** greeted with all major performance measures and objectives that they are associated too. Users are greeted with the list of Measure Sets, the highest level of Performance Measure Classification in the EPC. However users can display these measures within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



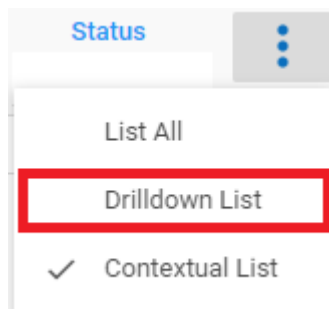
These steps are only required if a user is using an account or browser for the first time. As noted above, list preferences will be saved by user and browser to simplify navigation.

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-refresh the page

PERFORMANCE										
<div> <div>>></div> <div>LIST</div> <div>GRAPH</div> <div>DETAILS</div> </div>										
Favorite	Name	Role	Documents	Description	Type	Value	Unit	Color	Modified Date	
	☆ Acquire Strategic Targets				Objective				04-Apr-2017	
	☆ Convert Inquiries into Leads	1	1		KPI		Percentage		02-May-2017	
	☆ Cost Synergies				KPI	123	%		04-Apr-2017	
	☆ Generate Leads				Objective				02-May-2017	
	☆ Grow Organization Top Line				Objective				04-Apr-2017	
	☆ HR Performance Measures				Measure set				04-May-2017	
	☆ IT Performance Measures				Measure set				04-May-2017	
	☆ KCI 1	1			KCI	40	USD		02-May-2017	
	☆ KRI 1	1			KRI		Percentage		02-May-2017	
	☆ M&A Targets				Measure set				04-May-2017	
	☆ Revenue Synergies				KPI		%		04-Apr-2017	
	☆ Sales Targets				Measure set				13-Apr-2017	

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.

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.

PERFORMANCES										
<div> <div>>></div> <div>LIST</div> <div>GRAPH</div> <div>DETAILS</div> </div>										
Favorite	Name	Role	Documents	Description	Type	Value	Unit	Color	Modified Date	Status
				Acquire Strategic Targets	Objective				04-Apr-2017	Published
		1	1	Convert Inquiries into Leads	KPI		Percentage		13-Apr-2017	Published
				Cost Synergies	KPI		%		04-Apr-2017	Published
				Generate Leads	Objective				13-Apr-2017	Published
				Grow Organization Top Line	Objective				04-Apr-2017	Published
		1		KCI 1	KCI	40	USD		18-Apr-2017	Published
		1		KRI 1	KRI		Percentage		18-Apr-2017	Published
				M&A Targets	Measure set				13-Apr-2017	In Progress
				Revenue Synergies	KPI		%		04-Apr-2017	Published
				Sales Targets	Measure set				13-Apr-2017	Published

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

PERFORMANCES										
<div> <div>>></div> <div>LIST</div> <div>GRAPH</div> <div>DETAILS</div> </div>										
Favorite	Name	Role	Documents	Description	Type	Value	Unit	Color	Modified Date	Status
				Sales Targets	Measure set				13-Apr-2017	Published
				Revenue Synergies	KPI		%		04-Apr-2017	Published
				M&A Targets	Measure set				13-Apr-2017	In Progress
		1		KRI 1	KRI		Percentage		18-Apr-2017	Published
		1		KCI 1	KCI	40	USD		18-Apr-2017	Published
				Grow Organization Top Line	Objective				04-Apr-2017	Published
				Generate Leads	Objective				13-Apr-2017	Published
				Cost Synergies	KPI		%		04-Apr-2017	Published
		1	1	Convert Inquiries into Leads	KPI		Percentage		13-Apr-2017	Published
				Acquire Strategic Targets	Objective				04-Apr-2017	Published

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:

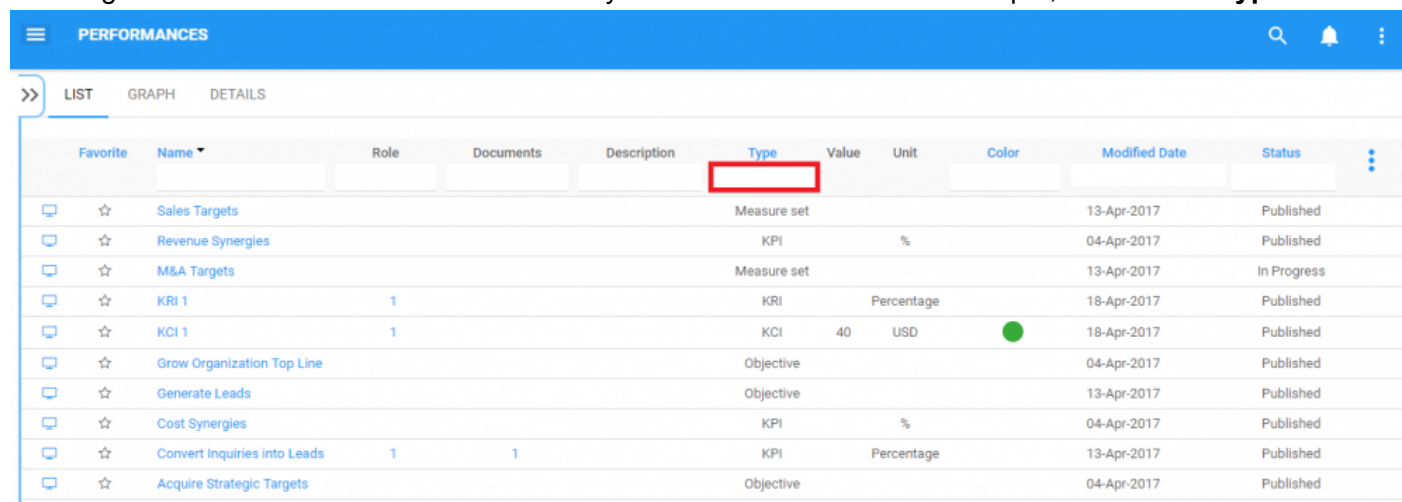
1. [How to Add Filters](#)
2. [How to Remove Filters](#)
3. [How to Combine Filters](#)

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**.

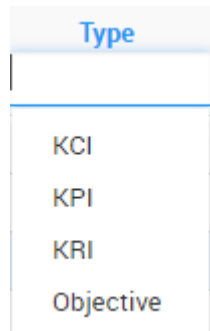
How to Add Filter

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



PERFORMANCES												
>> LIST GRAPH DETAILS												
Favorite	Name	Role	Documents	Description	Type	Value	Unit	Color	Modified Date	Status		
	☆ Sales Targets				Measure set				13-Apr-2017	Published		
	☆ Revenue Synergies				KPI		%		04-Apr-2017	Published		
	☆ M&A Targets				Measure set				13-Apr-2017	In Progress		
	☆ KRI 1	1			KRI		Percentage		18-Apr-2017	Published		
	☆ KCI 1	1			KCI	40	USD		18-Apr-2017	Published		
	☆ Grow Organization Top Line				Objective				04-Apr-2017	Published		
	☆ Generate Leads				Objective				13-Apr-2017	Published		
	☆ Cost Synergies				KPI		%		04-Apr-2017	Published		
	☆ Convert Inquiries into Leads	1	1		KPI		Percentage		13-Apr-2017	Published		
	☆ Acquire Strategic Targets				Objective				04-Apr-2017	Published		

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



Type

- KCI
- KPI
- KRI
- Objective

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

PERFORMANCES

LISTGRAPHDETAILS

Favorite	Name	Role	Documents	Description	Type	Value	Unit	Color	Modified Date	Status
					KPI x Objective x					
	Revenue Synergies				KPI		%		04-Apr-2017	Published
	Grow Organization Top Line				Objective				04-Apr-2017	Published
	Generate Leads				Objective				13-Apr-2017	Published
	Cost Synergies				KPI		%		04-Apr-2017	Published
	Convert Inquiries into Leads	1	1		KPI		Percentage		13-Apr-2017	Published
	Acquire Strategic Targets				Objective				04-Apr-2017	Published

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.

PERFORMANCES

>>

LIST

GRAPH

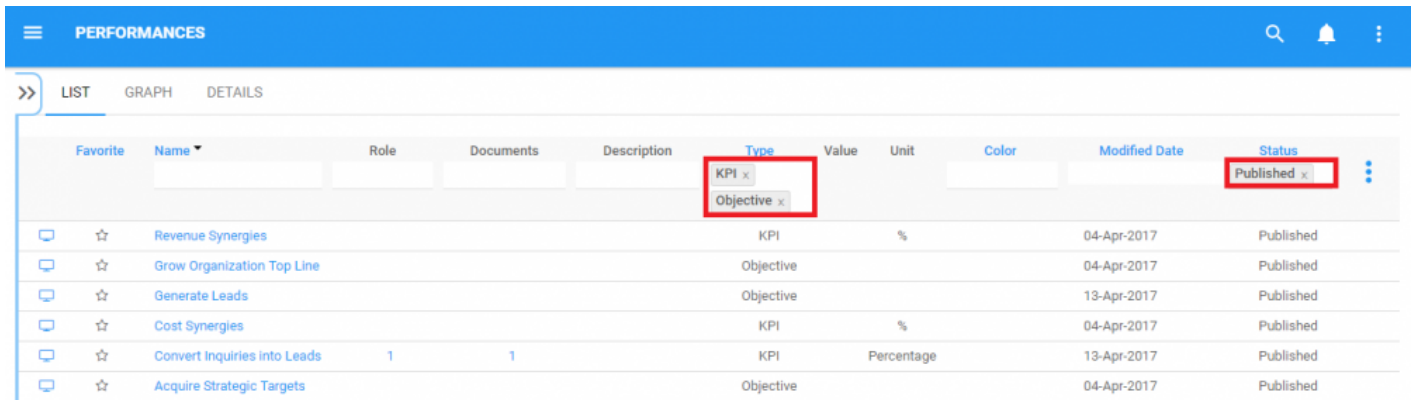
DETAILS

Favorite	Name	Role	Documents	Description	Type	Value	Unit
					KPI		
					Objective		
		Revenue Synergies			KPI		%
		Grow Organization Top Line			Objective		
		Generate Leads			Objective		
		Cost Synergies			KPI		%
		Convert Inquiries into Leads	1	1	KPI		Percentage
		Acquire Strategic Targets			Objective		

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.















Favorite	Name	Role	Documents	Description	Type	Value	Unit	Color	Modified Date	Status
					KPI x Objective x					Published x
☆	Revenue Synergies				KPI		%		04-Apr-2017	Published
☆	Grow Organization Top Line				Objective				04-Apr-2017	Published
☆	Generate Leads				Objective				13-Apr-2017	Published
☆	Cost Synergies				KPI		%		04-Apr-2017	Published
☆	Convert Inquiries into Leads	1	1		KPI		Percentage		13-Apr-2017	Published
☆	Acquire Strategic Targets				Objective				04-Apr-2017	Published

4.5.2.3 Quick Graph View

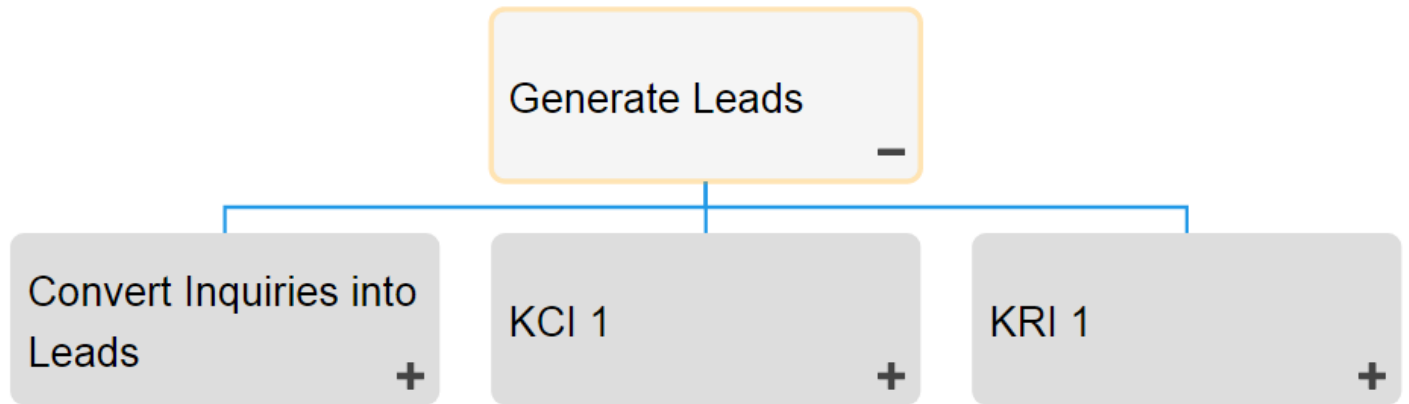
Quick Graph View is a feature of the EPC Web App that allows users to immediately view a graph associated with a Performance Measure or objective. While Graphs will be further explained below, the Quick Graph View allows users to quickly navigate to a Graph from “List View”.

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.

PERFORMANCES											
>> LIST GRAPH DETAILS											
Favorite	Name	Role	Documents	Description	Type	Value	Unit	Color	Modified Date	Status	
	☆ Sales Targets				Measure set				13-Apr-2017	Published	
	☆ Revenue Synergies				KPI		%		04-Apr-2017	Published	
	☆ M&A Targets				Measure set				13-Apr-2017	In Progress	
	☆ KRI 1	1			KRI		Percentage		18-Apr-2017	Published	
	☆ KCI 1	1			KCI	40	USD		18-Apr-2017	Published	
	☆ Grow Organization Top Line				Objective				04-Apr-2017	Published	
	☆ Generate Leads				Objective				13-Apr-2017	Published	
	☆ Cost Synergies				KPI		%		04-Apr-2017	Published	
	☆ Convert Inquiries into Leads	1	1		KPI		Percentage		13-Apr-2017	Published	
	☆ Acquire Strategic Targets				Objective				04-Apr-2017	Published	

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.


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](#))

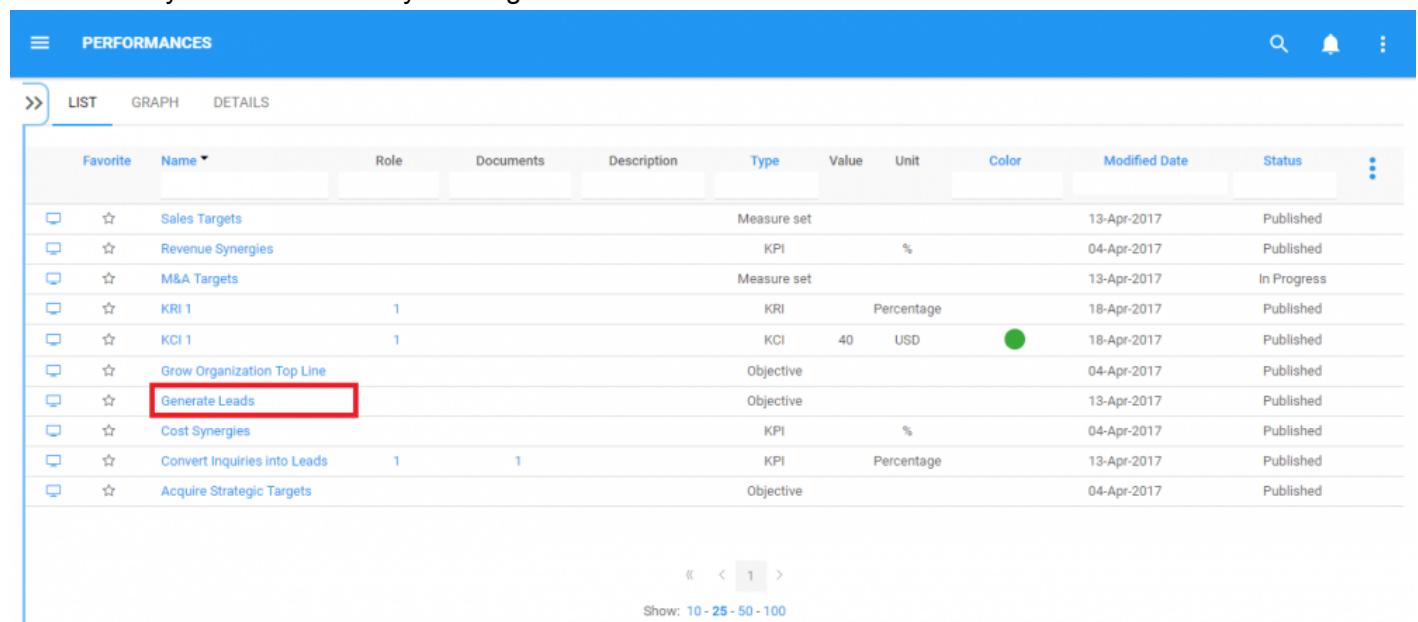
4.5.3.1 Graph Navigation

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



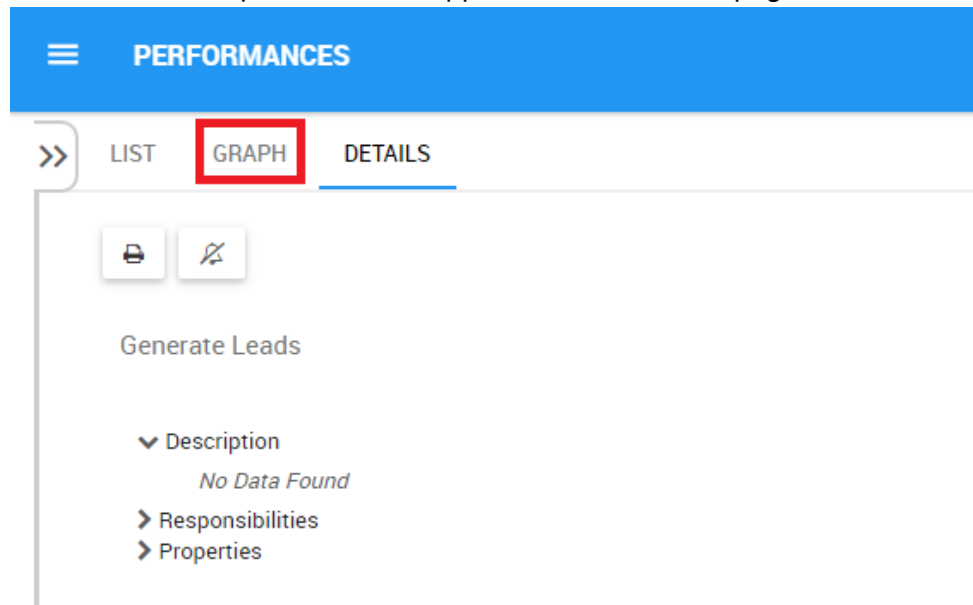
PERFORMANCES											Search	Notifications	More
LIST GRAPH DETAILS													
Favorite	Name	Role	Documents	Description	Type	Value	Unit	Color	Modified Date	Status			
	☆ Sales Targets				Measure set				13-Apr-2017	Published			
	☆ Revenue Synergies				KPI		%		04-Apr-2017	Published			
	☆ M&A Targets				Measure set				13-Apr-2017	In Progress			
	☆ KRI 1	1			KRI		Percentage		18-Apr-2017	Published			
	☆ KCI 1	1			KCI	40	USD		18-Apr-2017	Published			
	☆ Grow Organization Top Line				Objective				04-Apr-2017	Published			
	☆ Generate Leads				Objective				13-Apr-2017	Published			
	☆ Cost Synergies				KPI		%		04-Apr-2017	Published			
	☆ Convert Inquiries into Leads	1	1		KPI		Percentage		13-Apr-2017	Published			
	☆ Acquire Strategic Targets				Objective				04-Apr-2017	Published			

« < 1 > »

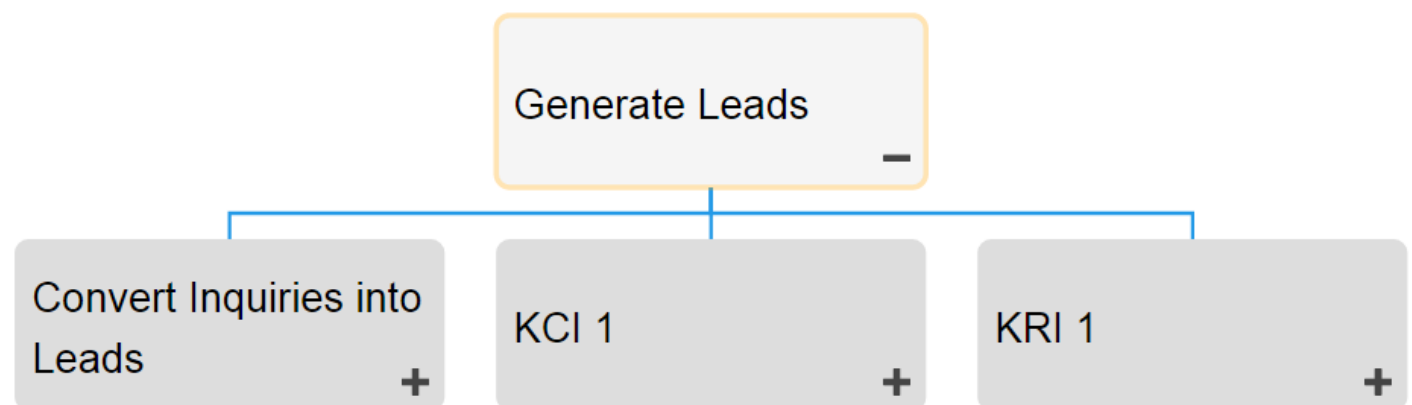
Show: 10 - 25 - 50 - 100

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

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

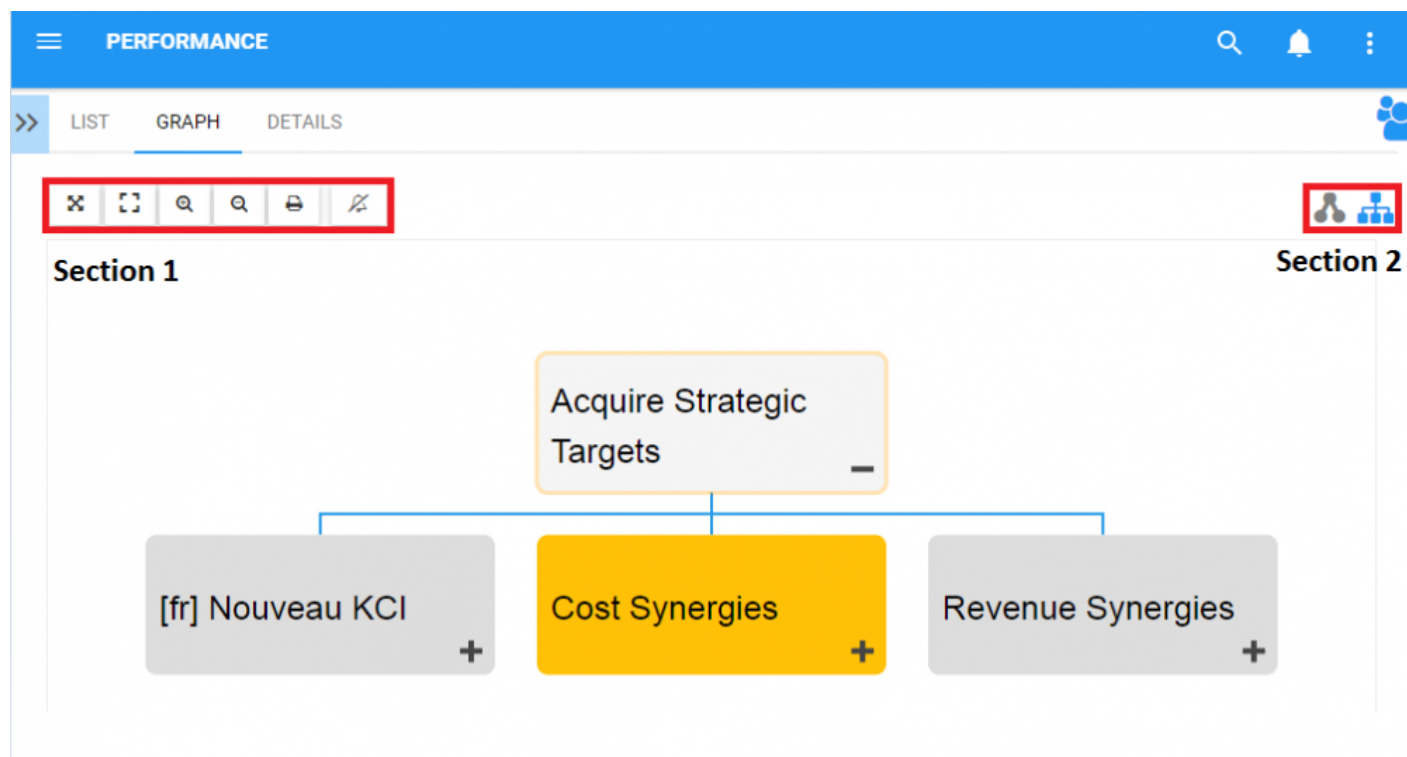


7. You will be navigated to the Graph section. By default, users will be sent to Hierarchy view as the default Graph view. An example of this view can be seen below.




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

Subscribe		<p>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.</p>
---------------------------	---	--


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

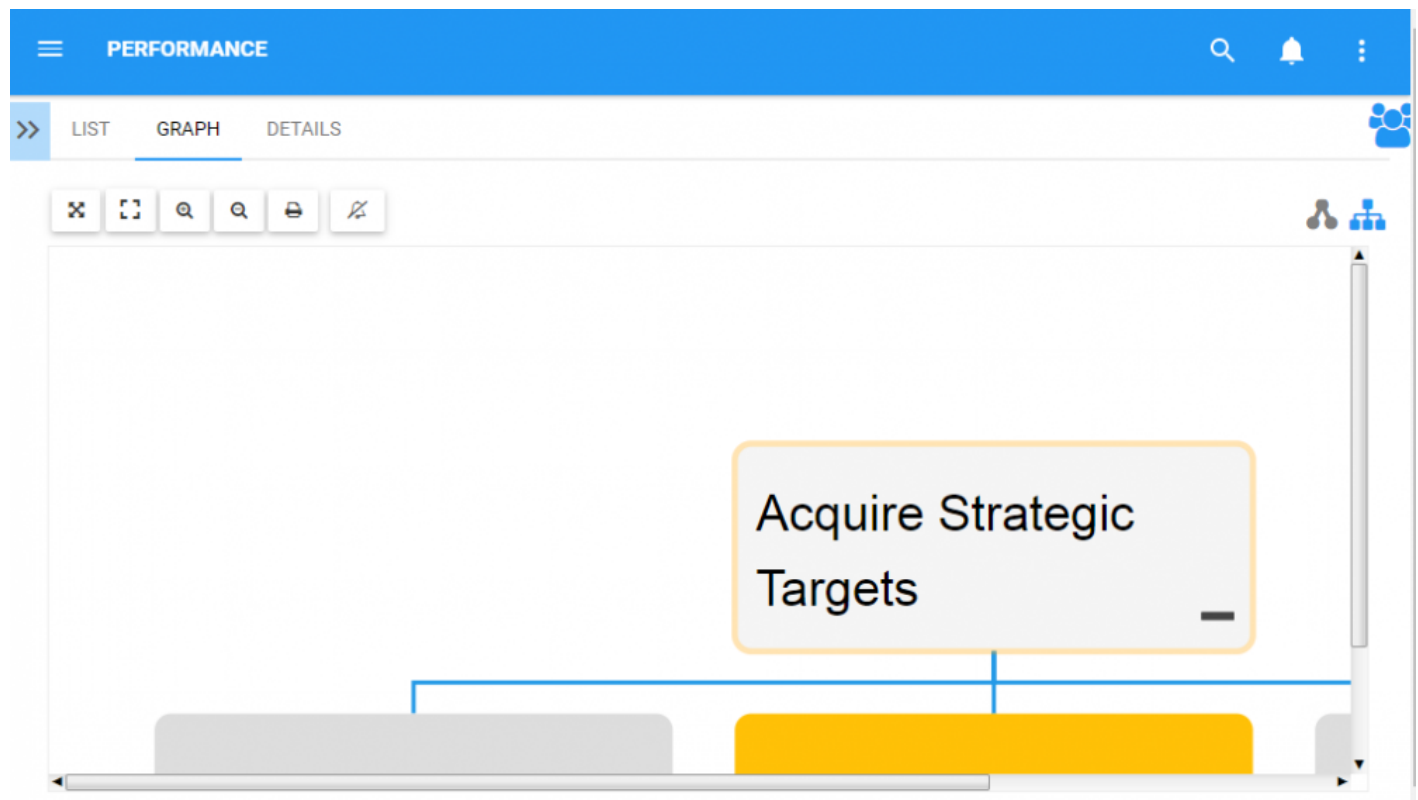
Item	Icon	Description
Impact Graph		<p>Graph showing downstream representation of associated items</p>
Hierarchy Graph		<p>Graph showing a top-down view of performance measures and how they fit within organizations</p>
Overview Graph		<p>Graph showing current performance comparative to listed performance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


4.5.3.1.1.1 Fit Screen

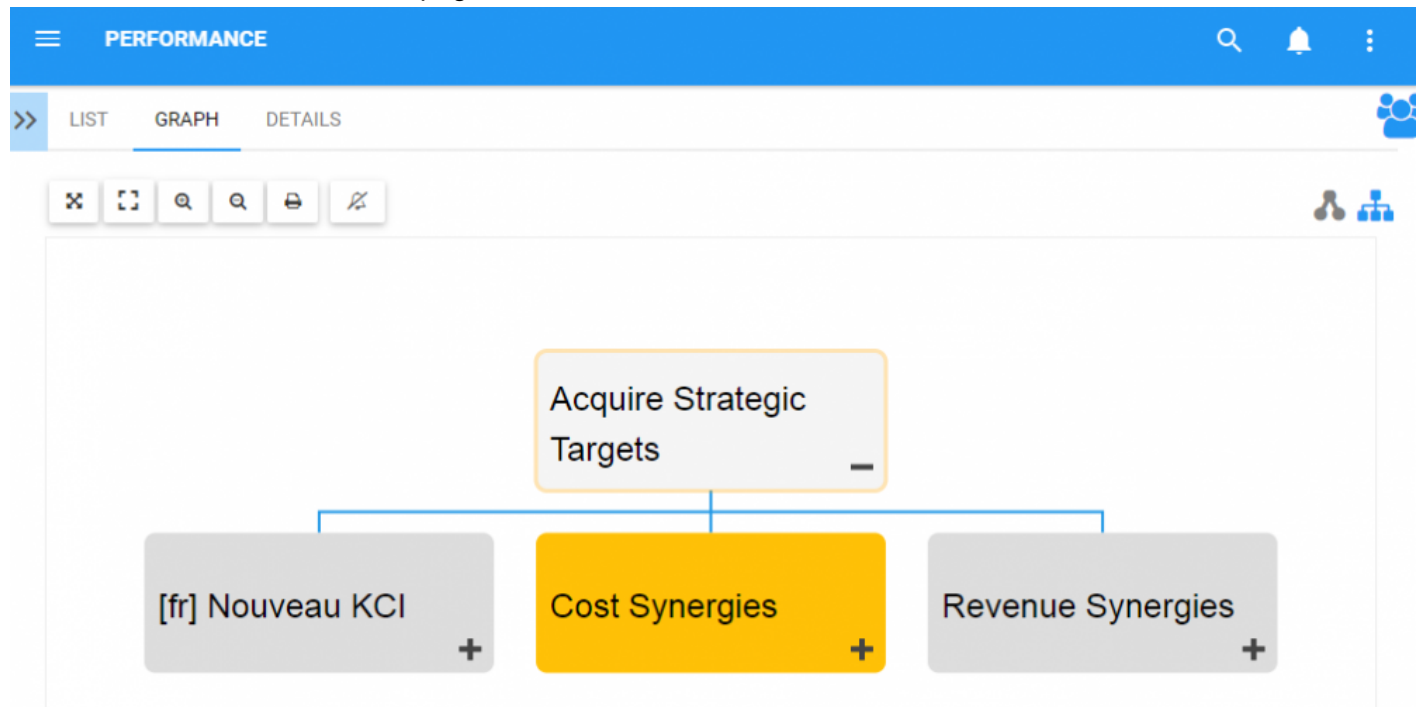
The fit screen function has been implemented to assist users at replacing and re-centering performance graphs.

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.





4. Click on button  and the page will be reset

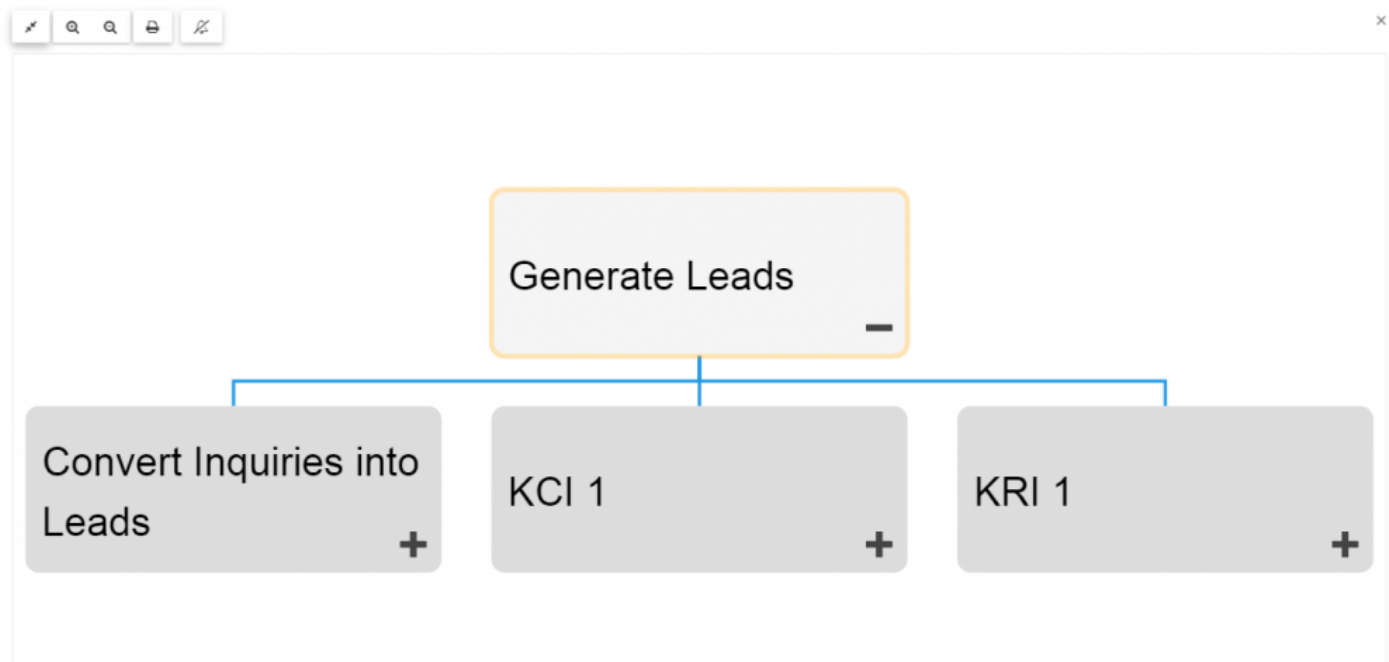


4.5.3.1.1.2 Full Screen

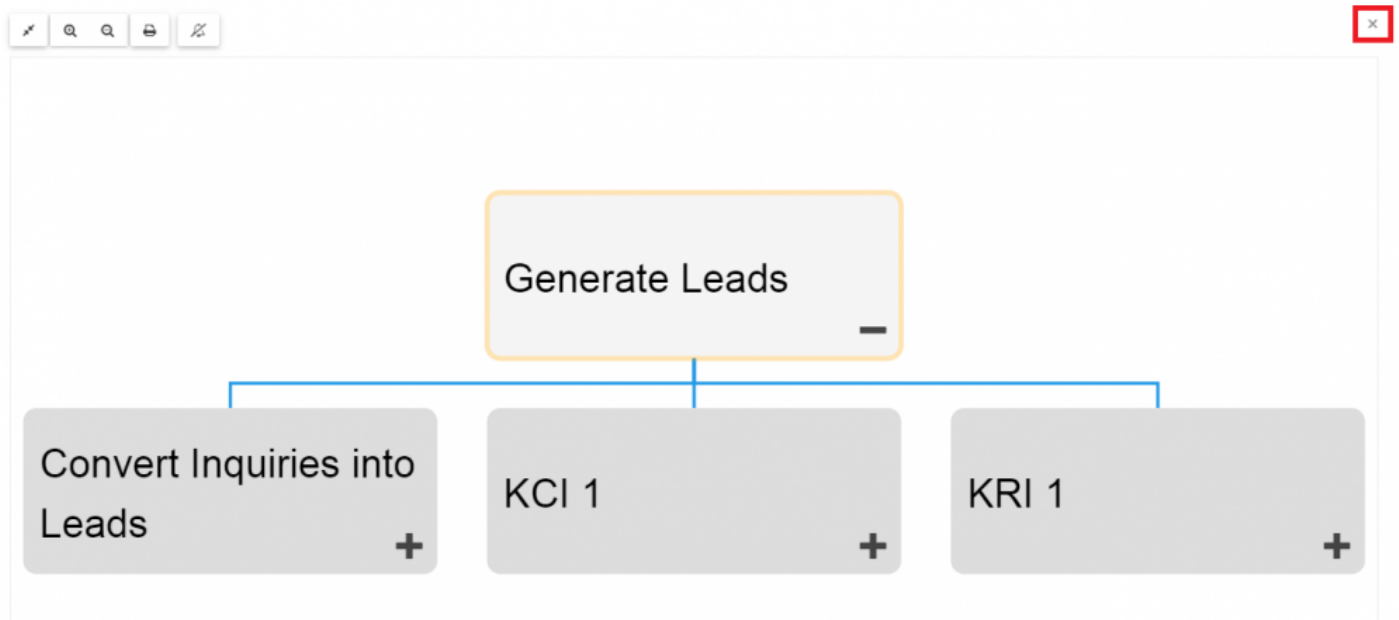
The fit screen function has been implemented to assist users at viewing Performance Measures, utilizing the full screen of a user.

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



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.

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.

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

Print Settings

General

A

Print Mode:

Single Page

B

Page Layout:

Landscape

C

Page Size:

Letter

Multi page print only

D

Graph Layout:

Left to Right

Close

Print

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 (216 × 279 mm) 8.5 × 14.0 in (216 × 356 mm)

	c. A3 d. A4	11.7 × 16.54 in (297 × 420 mm) 8.3 × 11.7 in (210 × 297 mm)
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)

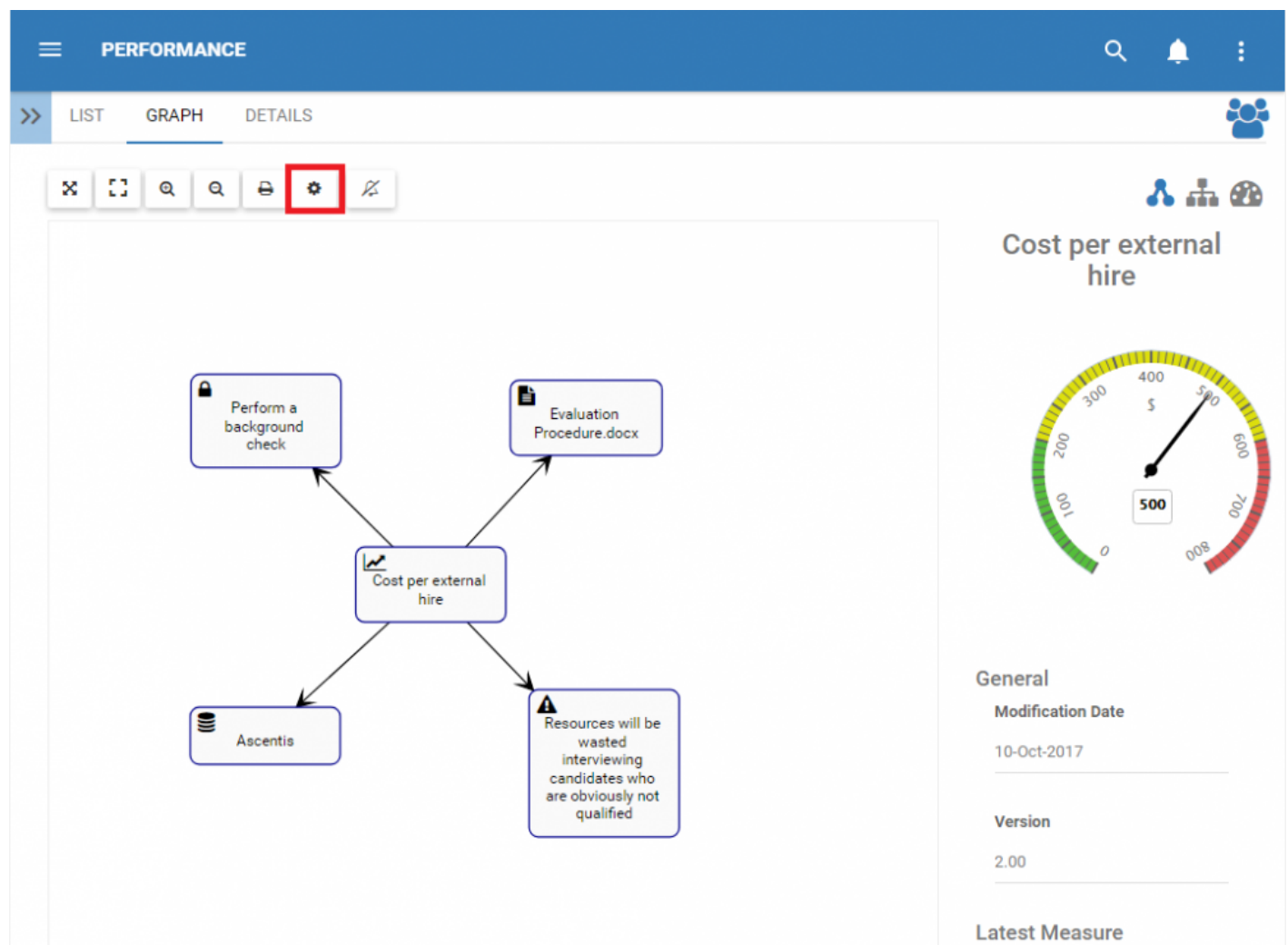
4.5.3.1.1.6 Options

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.

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




Map options ×

General —

Filter: ASSET, ATTRIBUTE, (▼

Reset to Default **Close** **Save changes**

To customize the graph and use the Filter option, please see the steps below:

1. Select “Options” icon 
2. Navigate cursor to “Asset, Attribute”



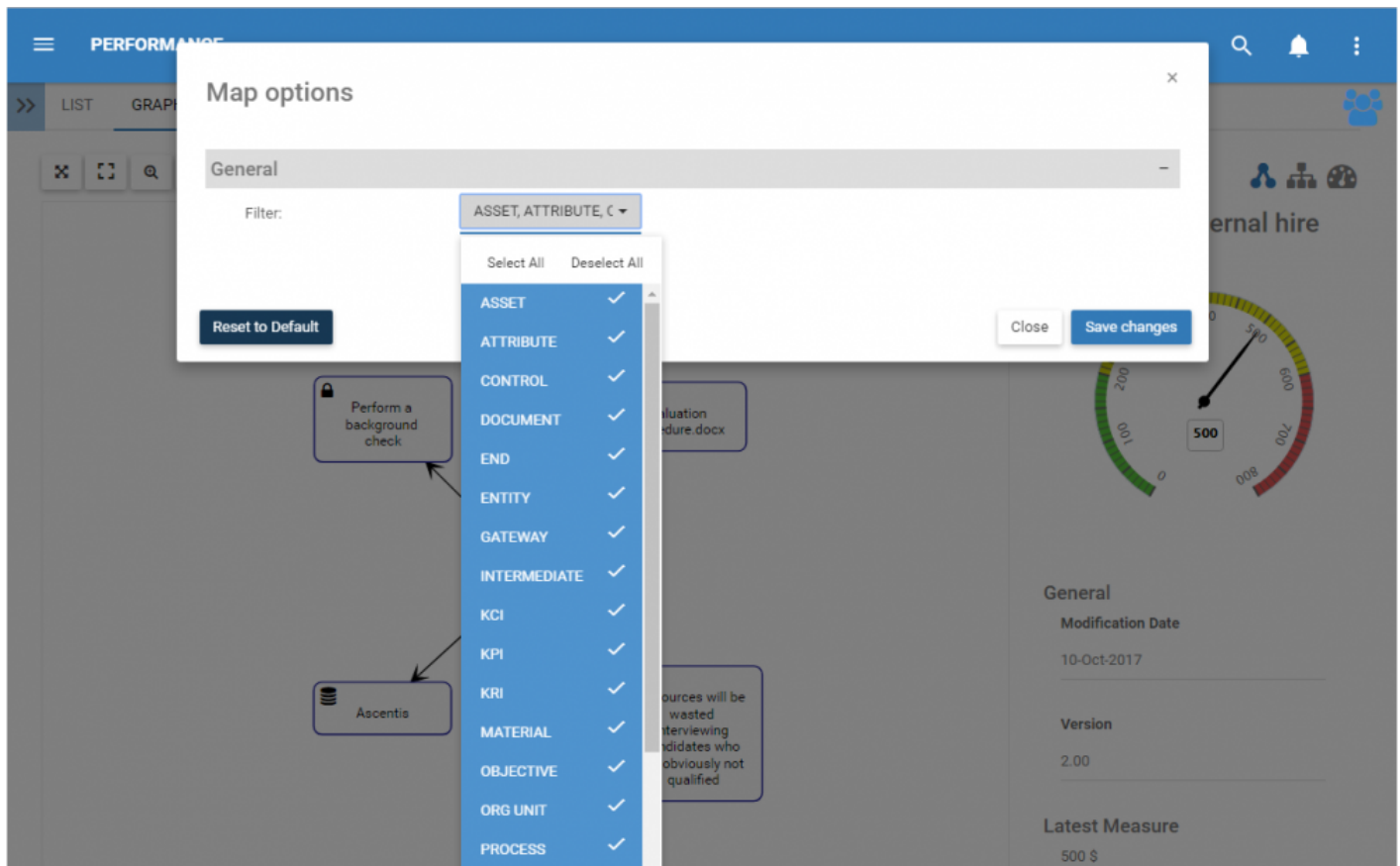
Map options ×

General —

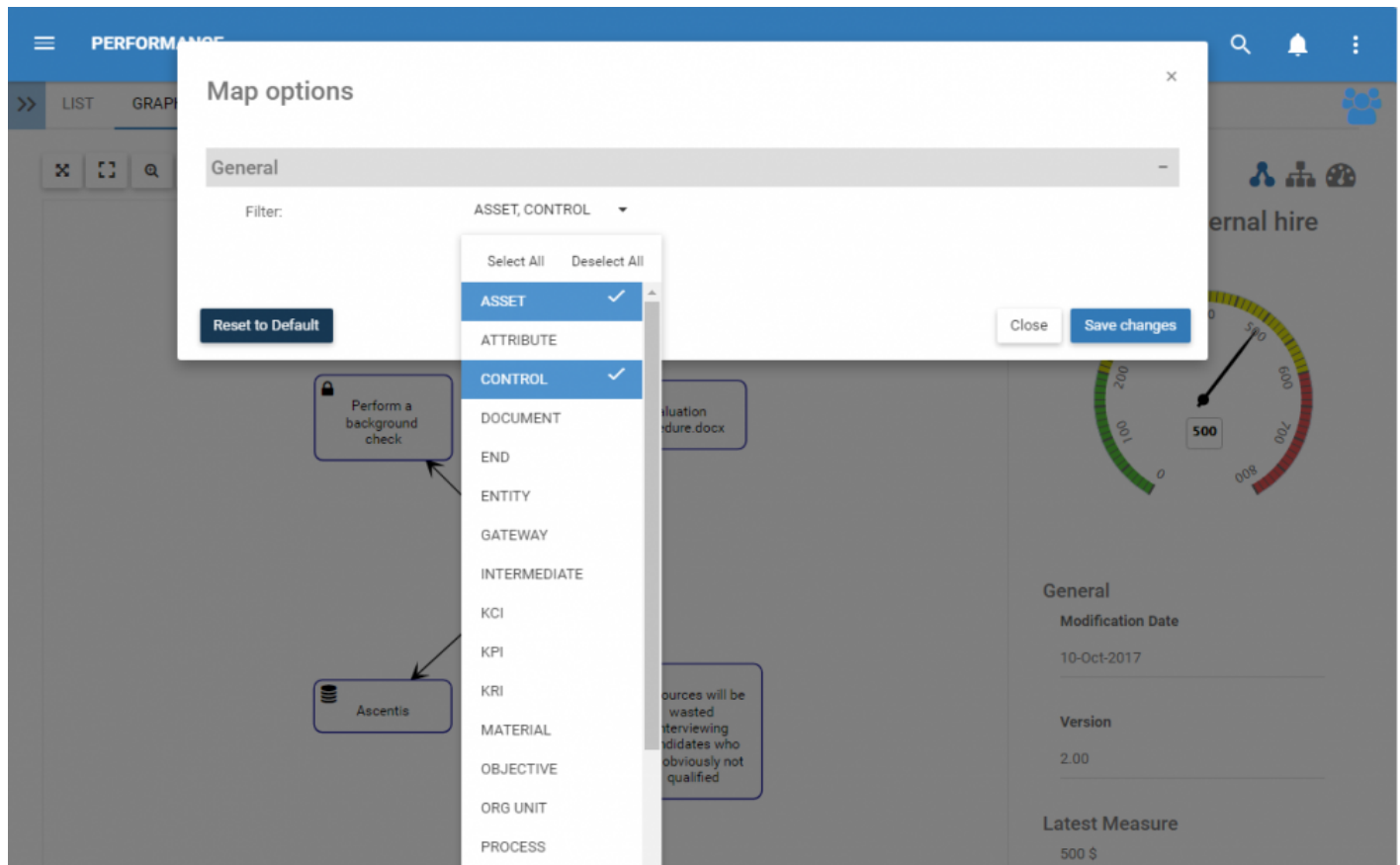
Filter: **ASSET, ATTRIBUTE, (▼**

Reset to Default **Close** **Save changes**

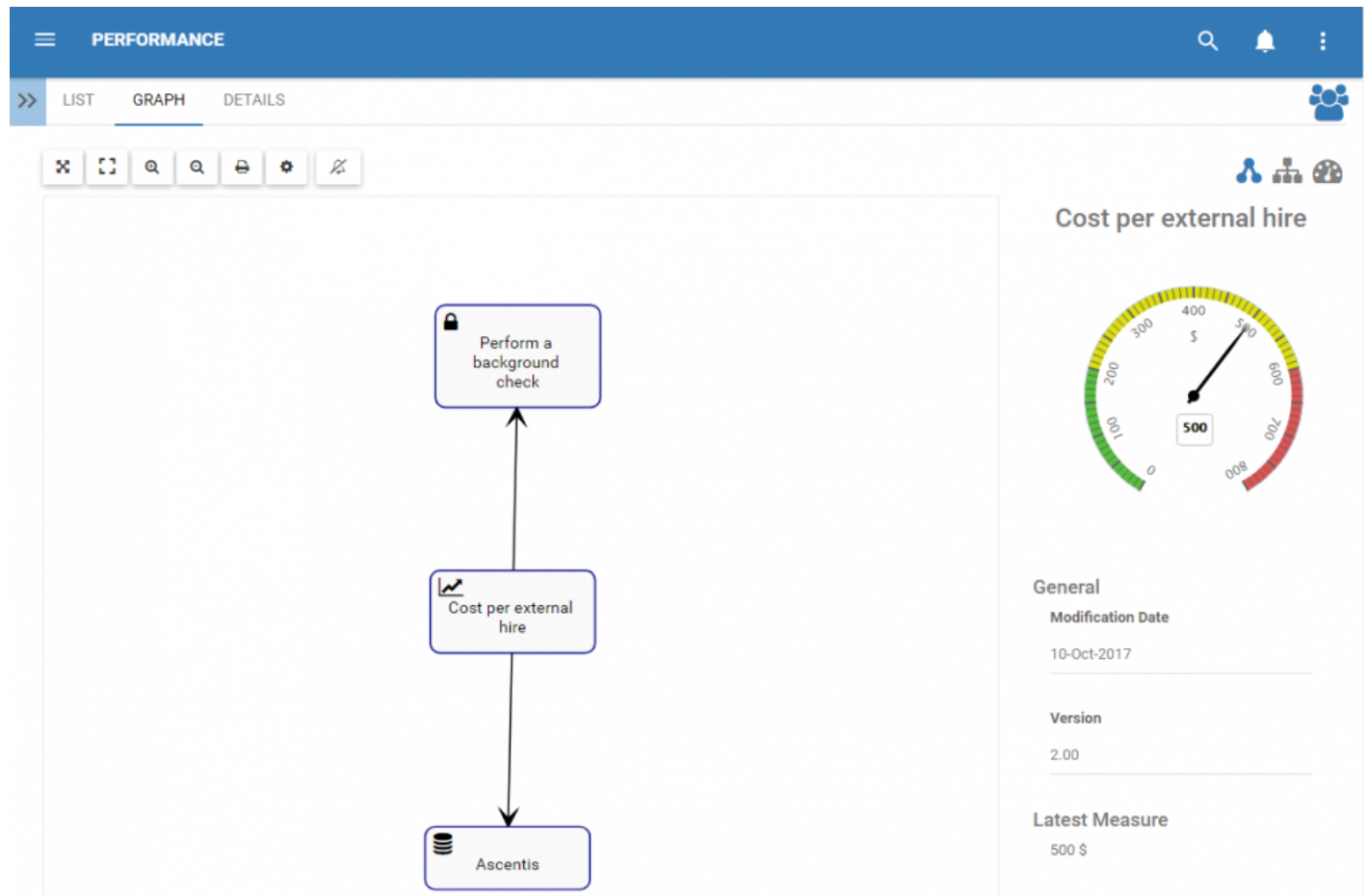
3. The following drop-down menu will be generated




4. Select the desired filter and select “Save Changes”. For this example, we will select **Assets** and **Controls**.



5. The following graph will be generating showing only the **Assets** and **Controls** that are related to the specific **Performance Measure**






4.5.3.1.1.7 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.

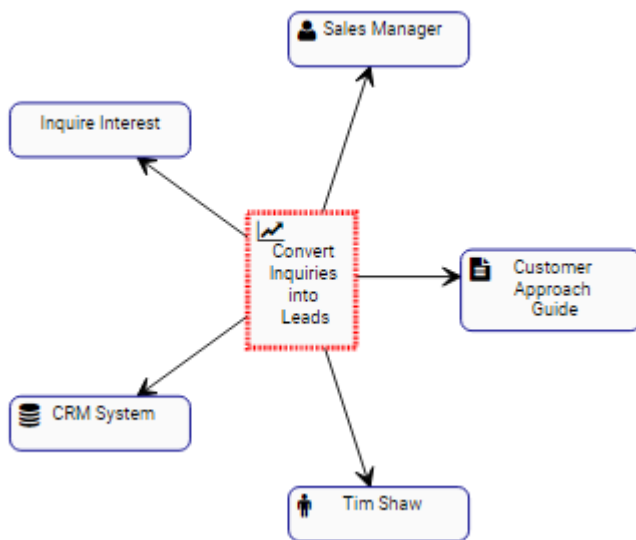
To use the Subscribe button, please see the following instructions.

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.

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.

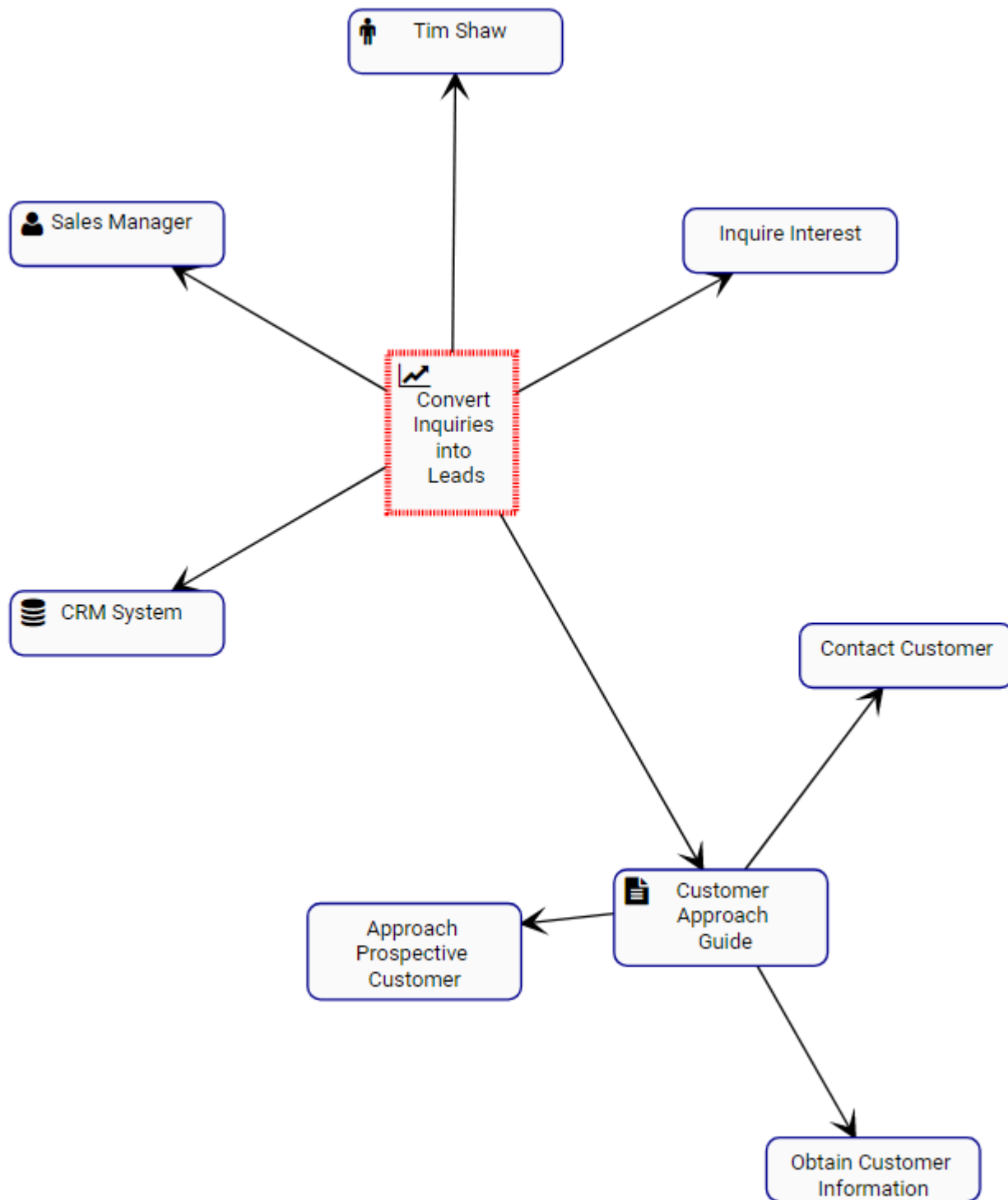
Impact Graph



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.

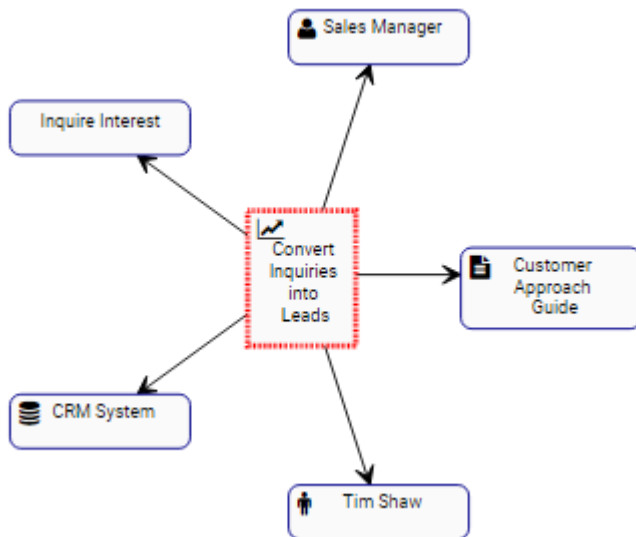


These Impact Graphs can be used to educate business users, to analyze internal business processes and help management optimize activities effectively. They provide management with a complete view of change impacts, enabling effecting change management planning.

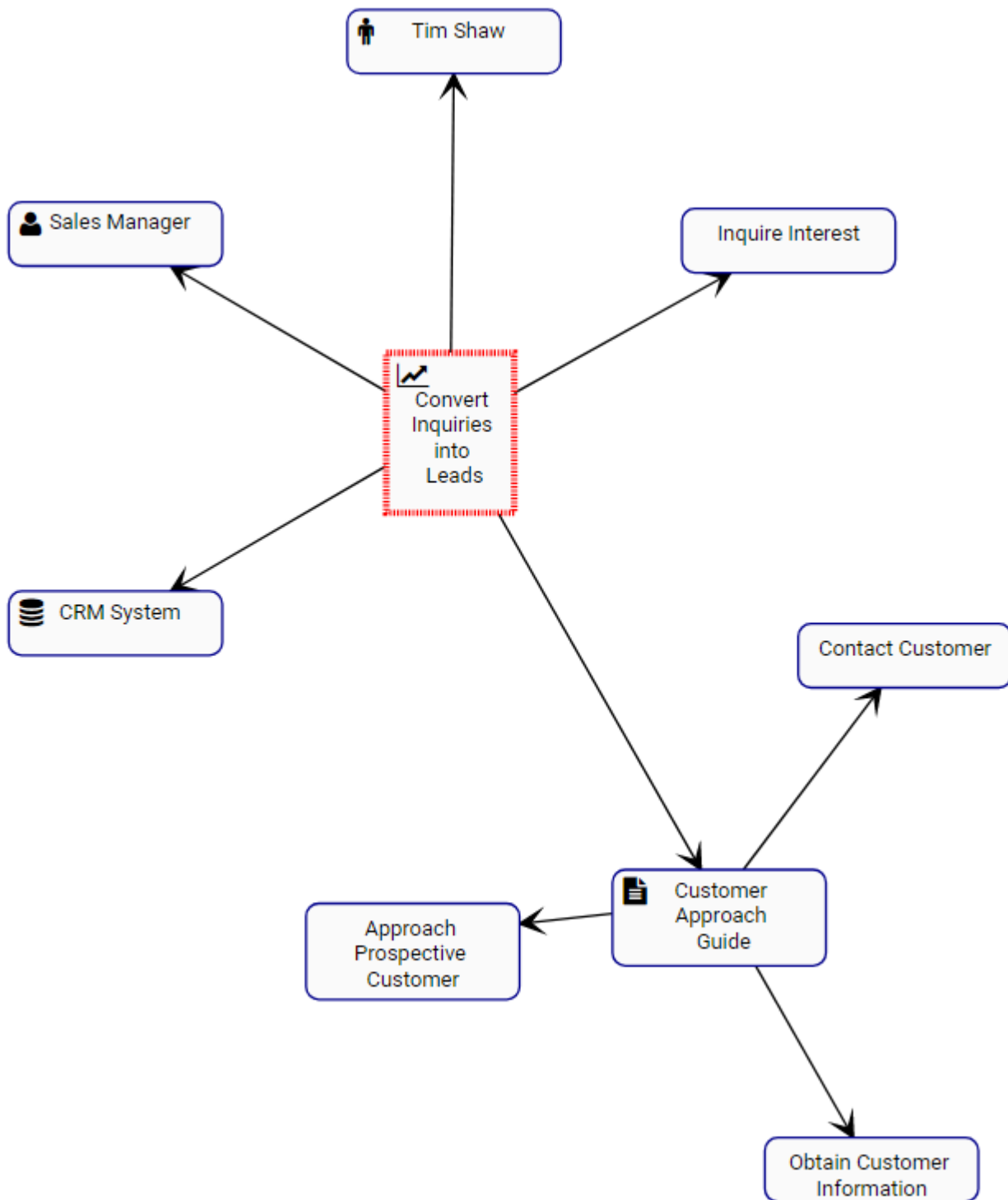
Impact Graph Navigation

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



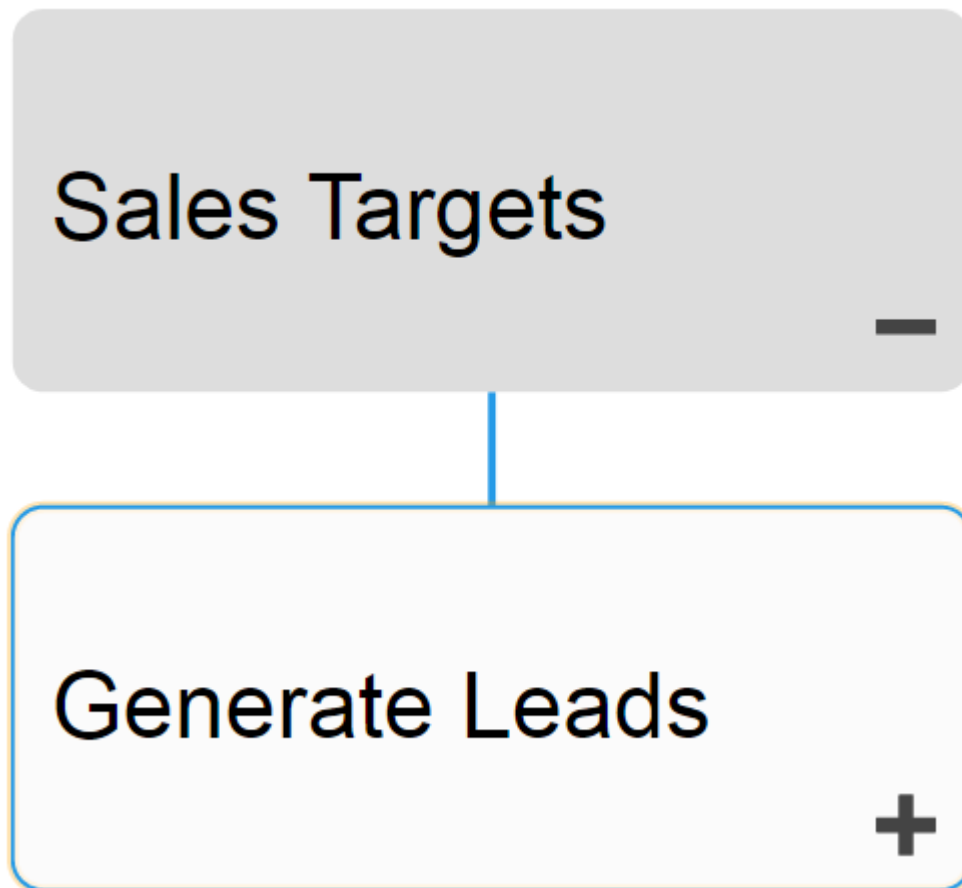
5. (Optional) To further expand the Impact Graph, simply double-click on the item to which you would like to display



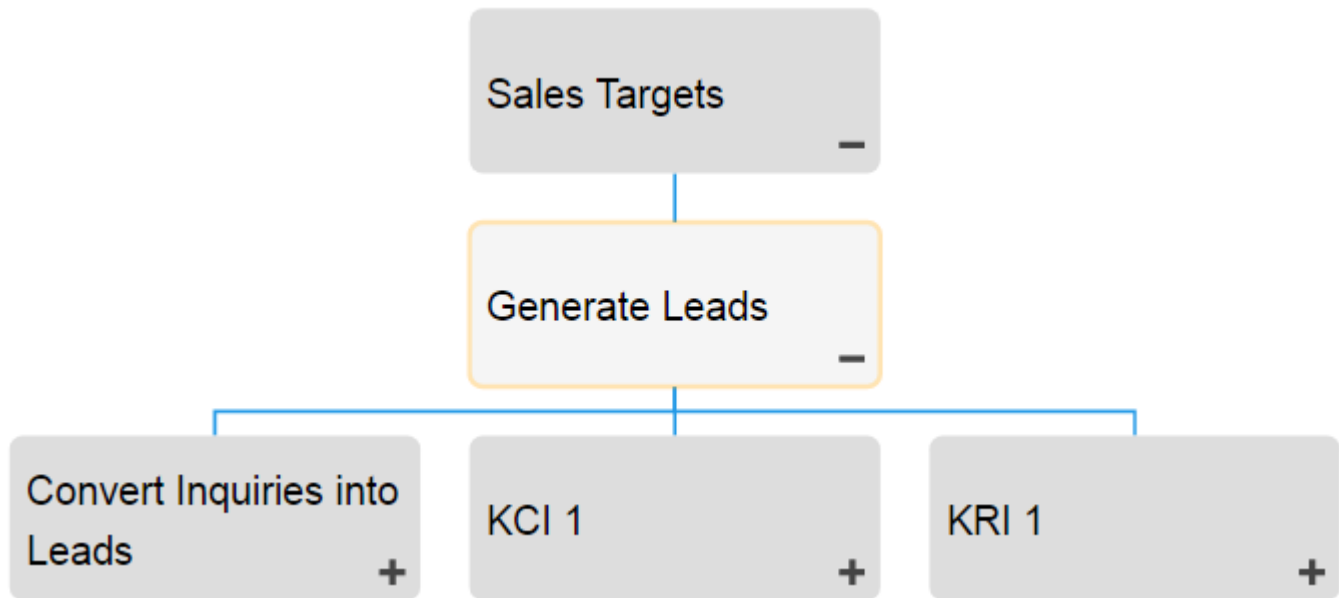
4.5.3.3 Hierarchy Graph

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.



Hierarchy Graph Navigation

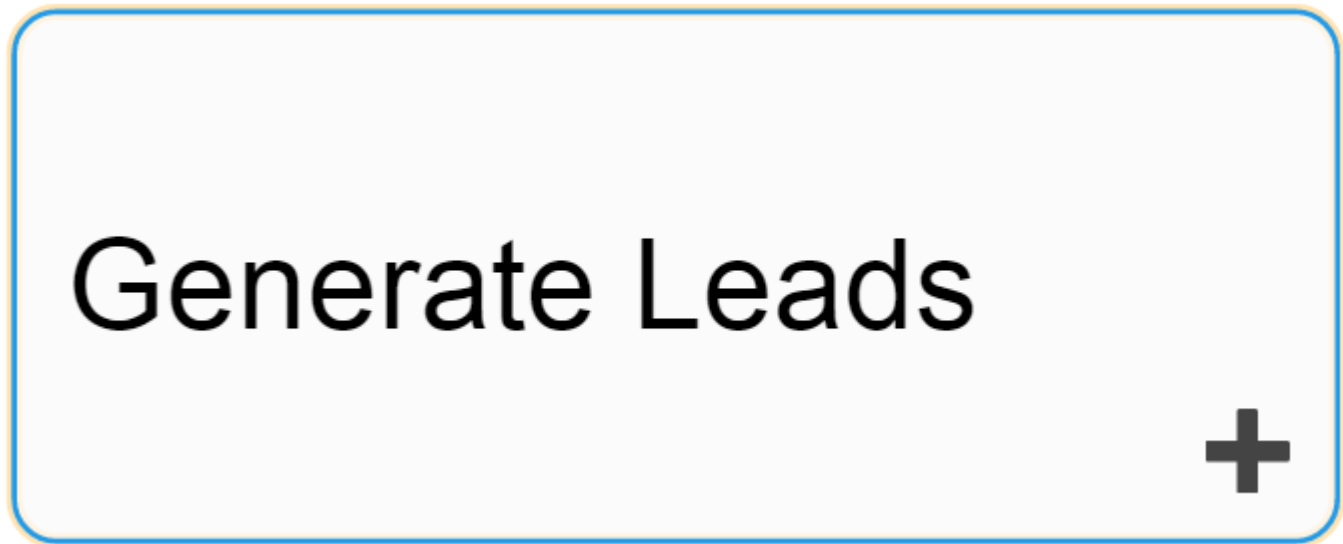
To navigate to Hierarchy Graphs, please see the following instructions.


1. Navigate to Performance
2. Select the item to which you would like to view.

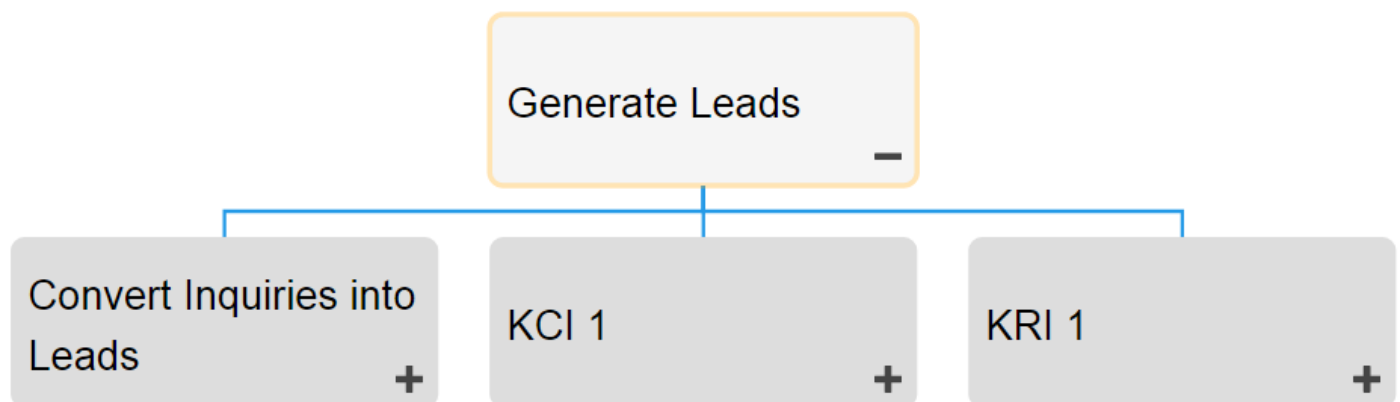
✿ The further you navigate, the more you limit the scope of Hierarchy Graphs. To view a complete picture of organizational objectives, select items listed as "Objective" in List View

3. Select the "Quick Graph View" icon  of the desired item


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.

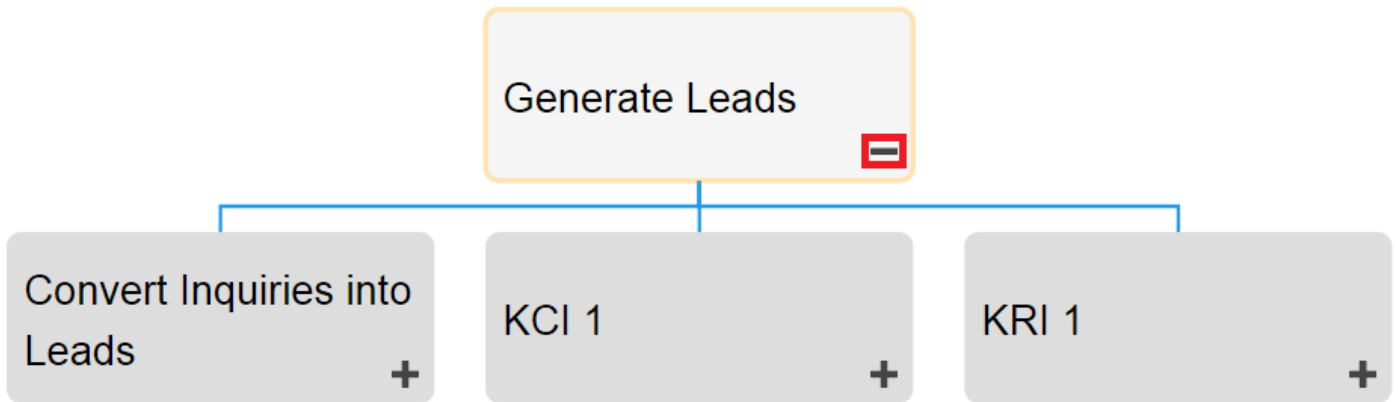


5. To further expand components of the Hierarchy Graph, double click on the  on the objects in the Graph. This will expand the item selected.



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

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



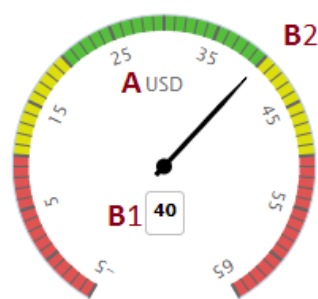
4.5.3.4 Overview Graph

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

Current Performance













C Add New Measure

Measure:

Date:

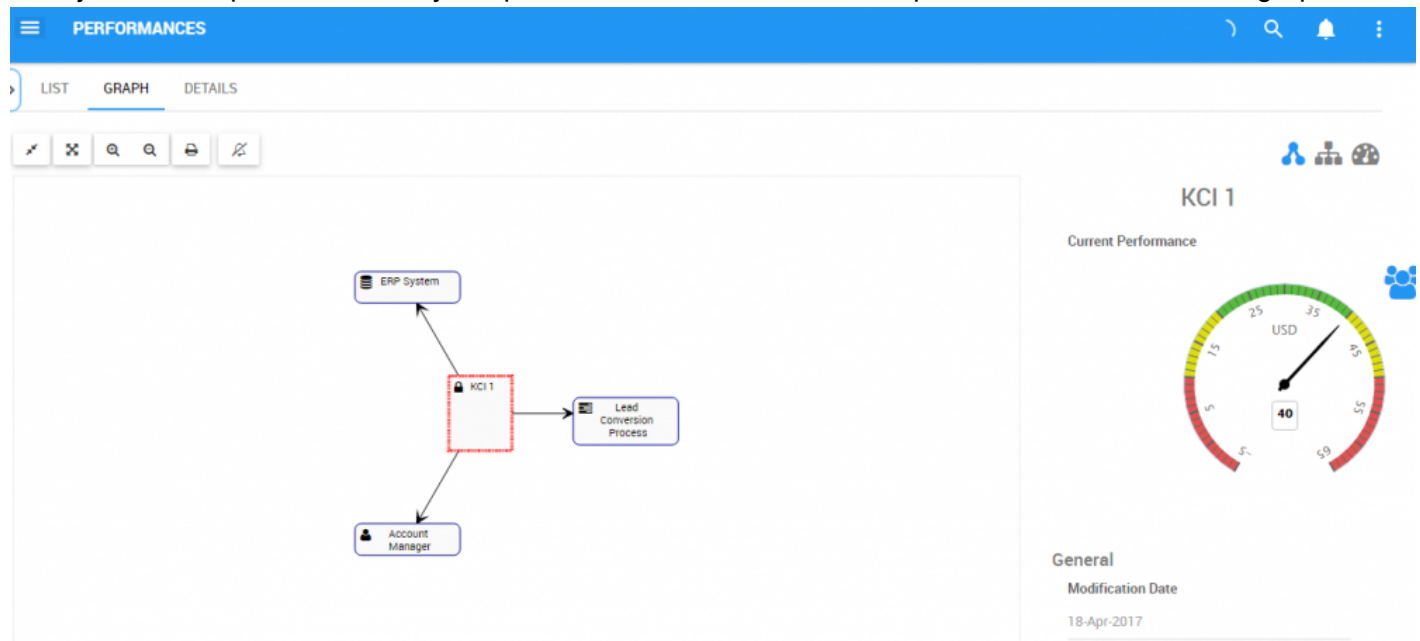
Comment:

D List of Measures

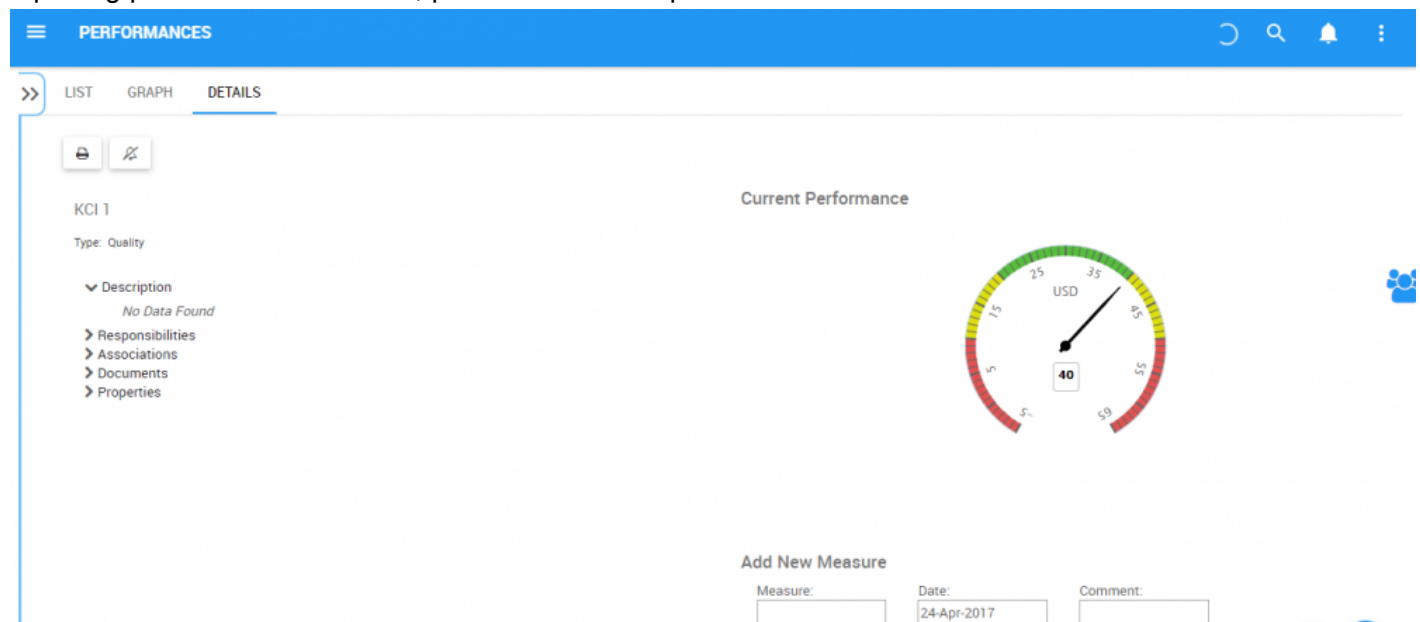
Value	Date	Comment	Created Date	
40.00	24-Apr-2017	Measure 5	24-Apr-2017	 
30.00	23-Apr-2017	Measure 4	24-Apr-2017	 
15.00	12-Apr-2017	Measure 3	24-Apr-2017	 
20.00	07-Apr-2017	Measure 2	24-Apr-2017	 
10.00	03-Apr-2017	Measure 1	24-Apr-2017	 

The overview graphs can be viewed in 2 contexts

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.

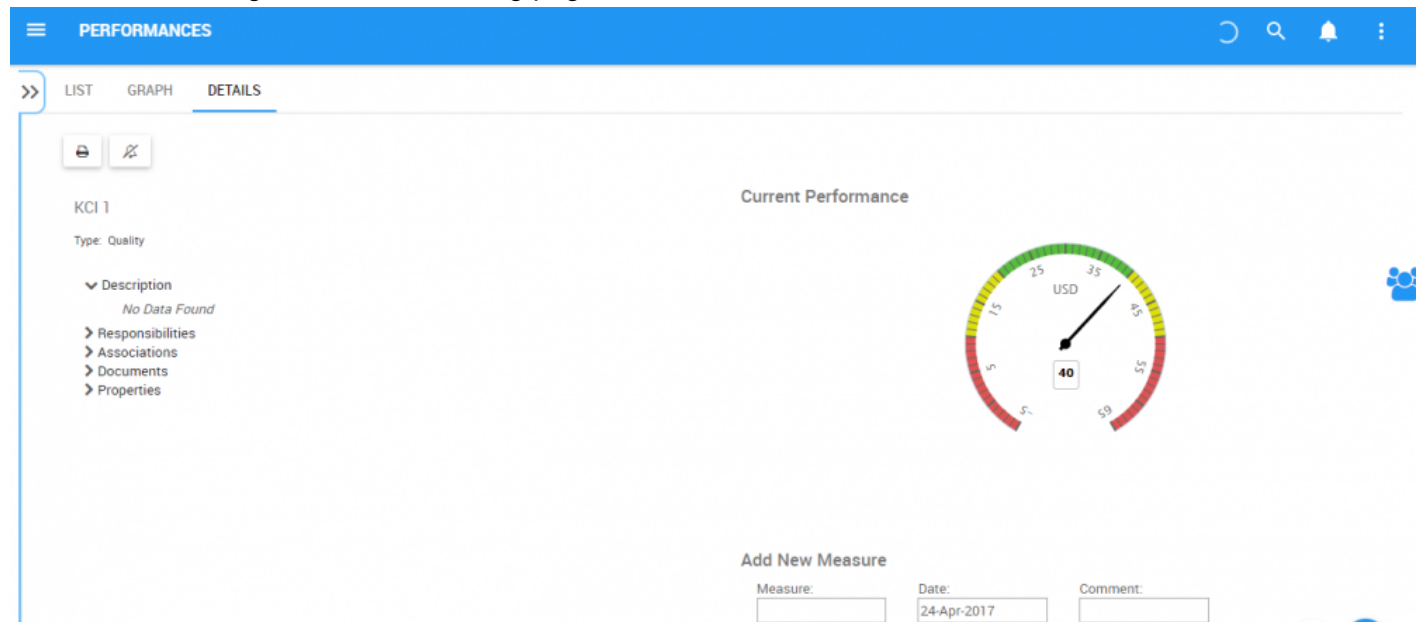


4.5.3.4.1 Inputting Performance

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.

Current Performance



Add New Measure

Measure:

Date:

Comment:

List of Measures

Value	Date	Comment	Created Date	
40.00	24-Apr-2017	Measure 5	24-Apr-2017	
30.00	23-Apr-2017	Measure 4	24-Apr-2017	
15.00	12-Apr-2017	Measure 3	24-Apr-2017	
20.00	07-Apr-2017	Measure 2	24-Apr-2017	
10.00	03-Apr-2017	Measure 1	24-Apr-2017	

✿ 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.

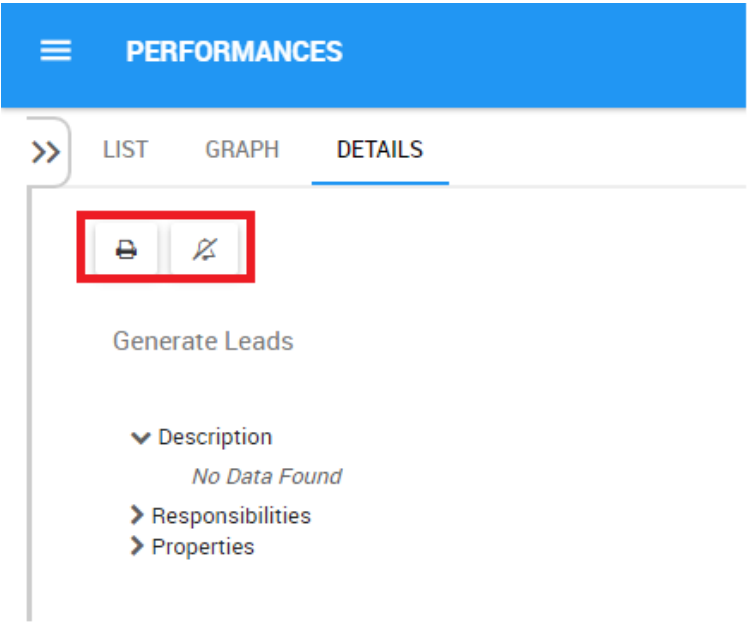
4.5.4 Details

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.

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.

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.

4/18/2017



Interfacing EPC

Generate Leads

04/18/2017

Generate Leads

Identifier: | Type:

▼ Description

No Data Found

➤ Responsibilities

➤ Properties

No status


NOT CONTROLLED IF PRINTED



Version Number :

<http://epc10red.interfacing.com/performance/details/552412DA-6401-4290-8623-D647AC07CF9A?modeType=OBJECTIVE>

1/1

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 .


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 provided 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.

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.

4.5.4.2.2 Responsibilities

The Responsibilities section displays the 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.

▼ Responsibilities

▼ Roles

 [Account Manager \[R \]](#)

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.

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 as 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.

▼ Documents

 [Interest Questionnaire \(DOCX\)](#)  

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](#) .

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

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](#)

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

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)

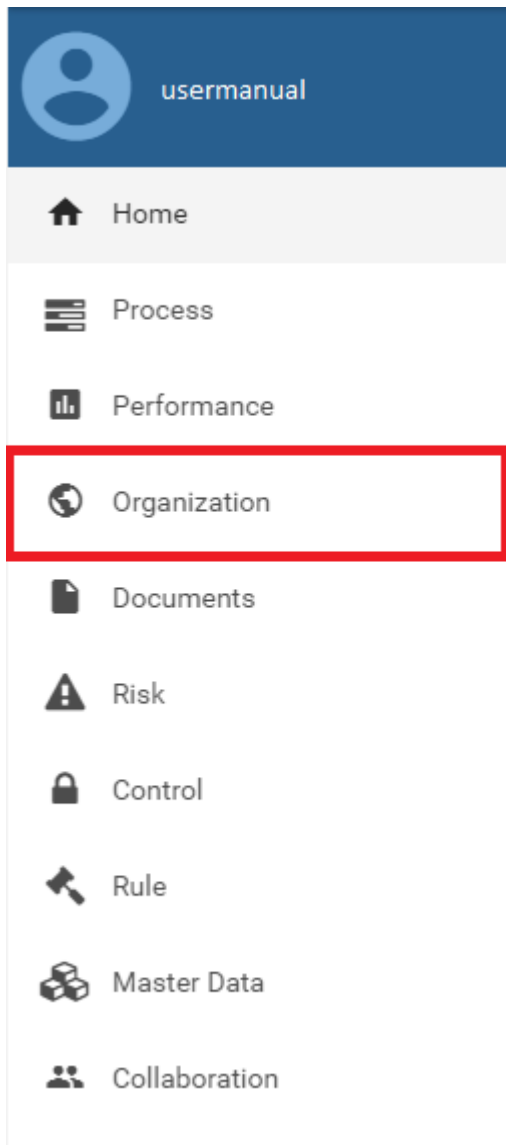
Organizational items that have been published from the EPC Modeler can be viewed in this module.

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**

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

Favorite	Name	Org Units	Type	Modified Date
	Generic Organization Ltd.		Org unit set	27-Apr-2017
	Subsidiary 3		Org unit set	04-May-2017
	Subsidiary 1		Org unit set	04-May-2017
	Subsidiary 2		Org unit set	04-May-2017

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-refresh 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.

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.

ORGANIZATION								
>> LIST GRAPH DETAILS								
	Favorite	Name ▲	Org Units	Type	Modified Date			
	☆	Account Manager		Role	04-Apr-2017			
	☆	Customer Service		Org Unit	04-Apr-2017			
	☆	Customer Service Manager		Role	04-Apr-2017			
	☆	Sales Director		Role	04-Apr-2017			
	☆	Sales Force		Org Unit	04-Apr-2017			
	☆	Sales Manager		Role	04-Apr-2017			
	☆	Sales Representative		Role	04-Apr-2017			

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

ORGANIZATION								
>> LIST GRAPH DETAILS								
	Favorite	Name ▼	Org Units	Type	Modified Date			
	☆	Sales Representative		Role	04-Apr-2017			
	☆	Sales Manager		Role	04-Apr-2017			
	☆	Sales Force		Org Unit	04-Apr-2017			
	☆	Sales Director		Role	04-Apr-2017			
	☆	Customer Service Manager		Role	04-Apr-2017			
	☆	Customer Service		Org Unit	04-Apr-2017			
	☆	Account Manager		Role	04-Apr-2017			

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:

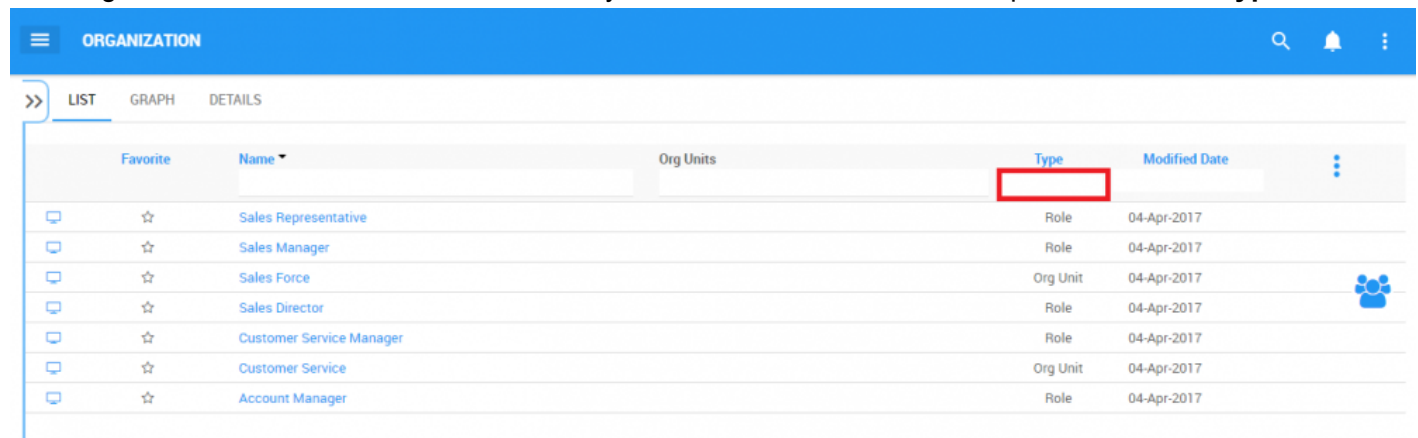
1. [How to Add Filters](#)
2. [How to Remove Filters](#)
3. [How to Combine Filters](#)

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**.

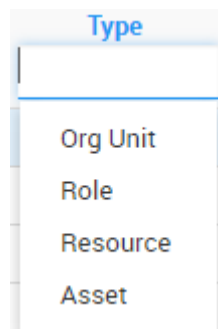
How to Add Filter

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



ORGANIZATION				
» LIST GRAPH DETAILS				
Favorite	Name	Org Units	Type	Modified Date
	☆ Sales Representative		Role	04-Apr-2017
	☆ Sales Manager		Role	04-Apr-2017
	☆ Sales Force		Org Unit	04-Apr-2017
	☆ Sales Director		Role	04-Apr-2017
	☆ Customer Service Manager		Role	04-Apr-2017
	☆ Customer Service		Org Unit	04-Apr-2017
	☆ Account Manager		Role	04-Apr-2017

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



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

ORGANIZATION

LISTGRAPHDETAILS











Favorite	Name	Org Units	Type	Modified Date	
			Org Unit x Role x		
	☆	Sales Representative	Role	04-Apr-2017	
	☆	Sales Manager	Role	04-Apr-2017	
	☆	Sales Force	Org Unit	04-Apr-2017	
	☆	Sales Director	Role	04-Apr-2017	
	☆	Customer Service Manager	Role	04-Apr-2017	
	☆	Customer Service	Org Unit	04-Apr-2017	
	☆	Account Manager	Role	04-Apr-2017	

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.

ORGANIZATION					
<div><div>>></div><div>LIST</div><div>GRAPH</div><div>DETAILS</div></div>					
Favorite	Name	Org Units	Type	Modified Date	
			Org Unit 		
			Role 		
	☆ Sales Representative		Role	04-Apr-2017	
	☆ Sales Manager		Role	04-Apr-2017	
	☆ Sales Force		Org Unit	04-Apr-2017	
	☆ Sales Director		Role	04-Apr-2017	
	☆ Customer Service Manager		Role	04-Apr-2017	
	☆ Customer Service		Org Unit	04-Apr-2017	
	☆ Account Manager		Role	04-Apr-2017	


4.6.2.2.3 Combine Filter

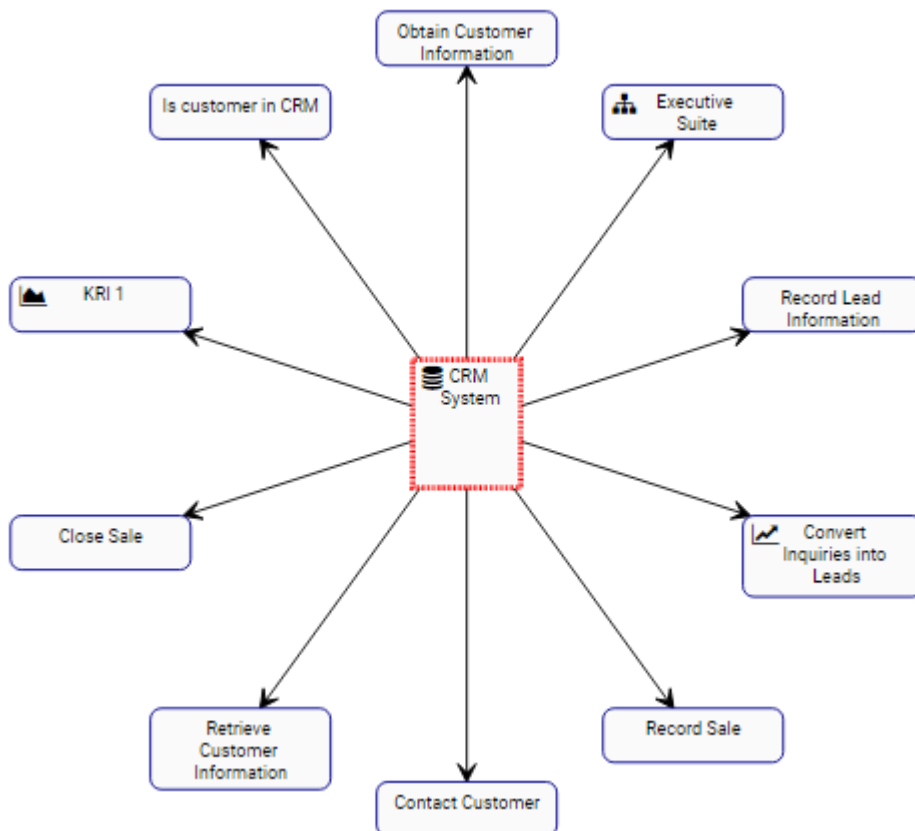
You can combine filters, meaning you can add any other column filter to isolate results. See above to see how to [add](#) filters.

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.

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.

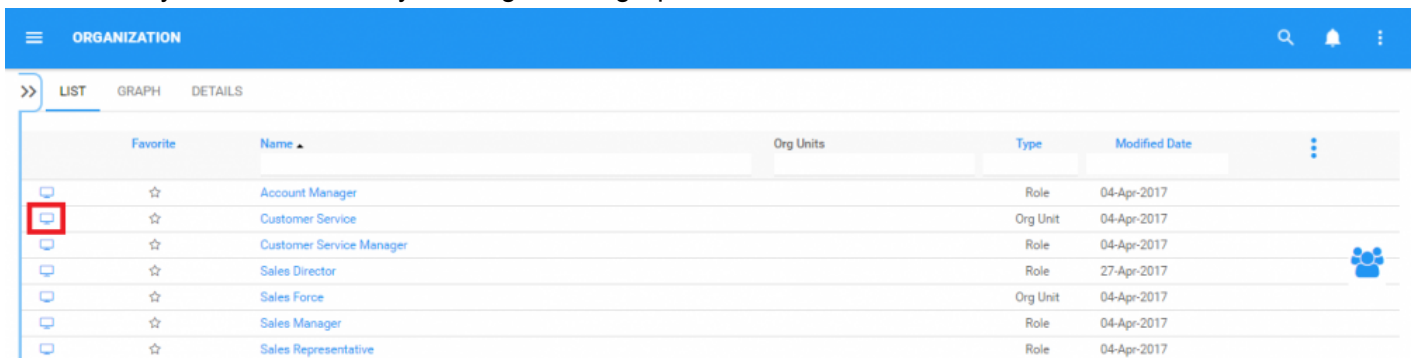
4.6.3.1 Graph Navigation








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

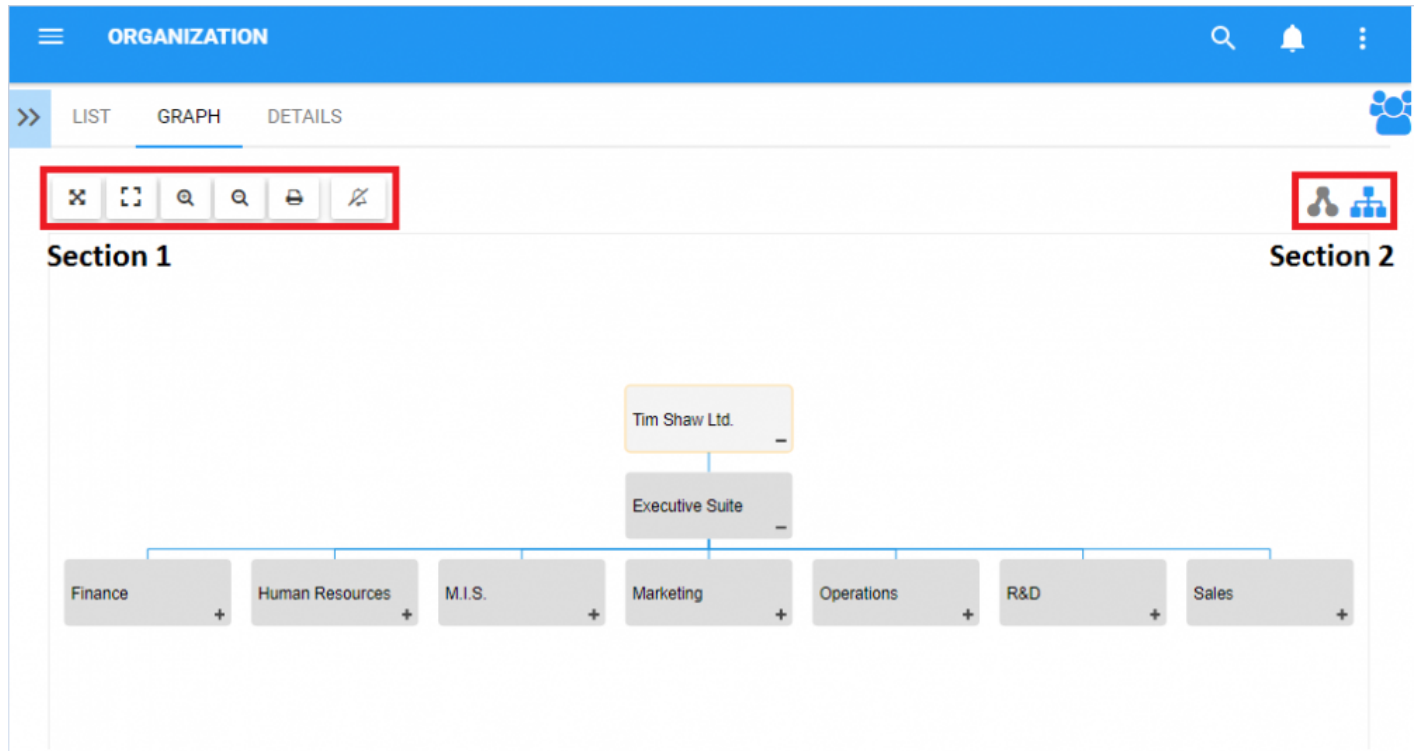


ORGANIZATION					
>> LIST GRAPH DETAILS					
Favorite	Name	Org Units	Type	Modified Date	
	Account Manager		Role	04-Apr-2017	
	Customer Service		Org Unit	04-Apr-2017	
	Customer Service Manager		Role	04-Apr-2017	
	Sales Director		Role	27-Apr-2017	
	Sales Force		Org Unit	04-Apr-2017	
	Sales Manager		Role	04-Apr-2017	
	Sales Representative		Role	04-Apr-2017	

5. You will be navigated to the Graph section


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

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.

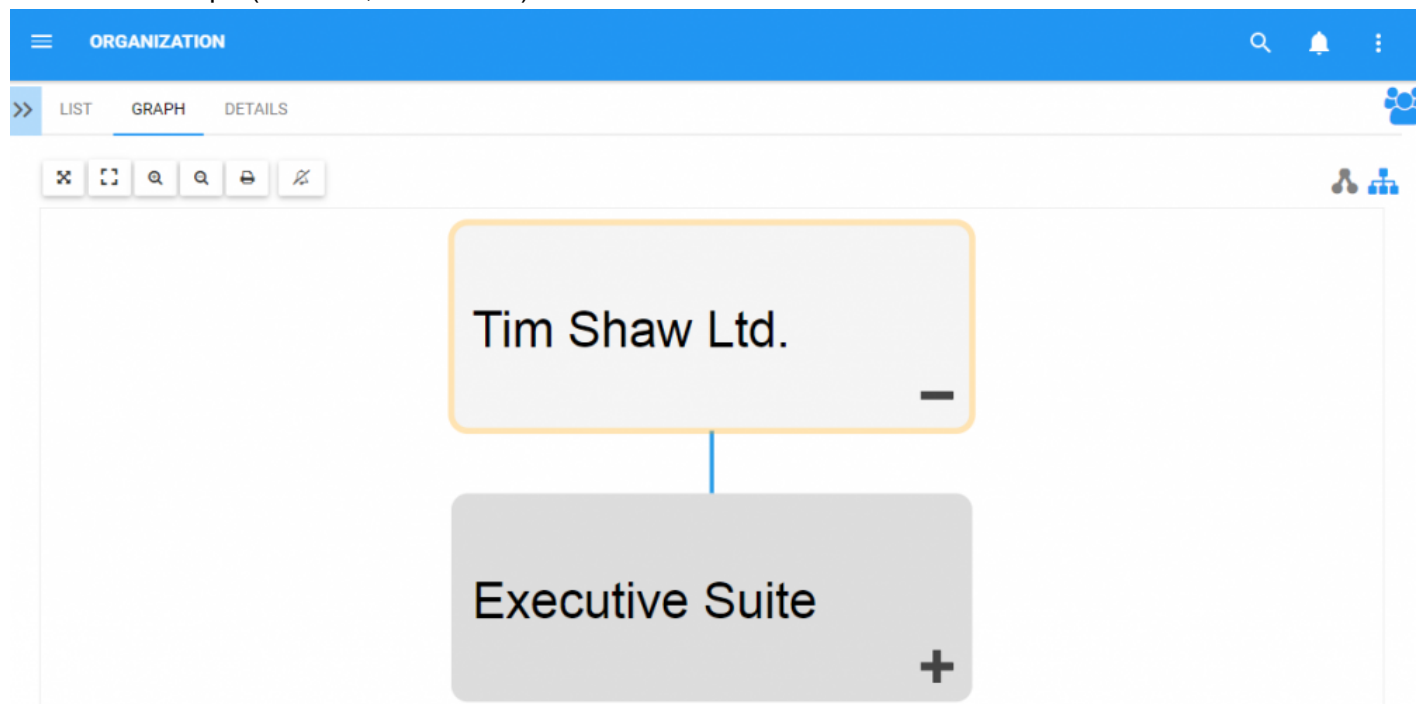
Item	Icon	Description
Impact Graph		Graph showing downstream representation of associated items
Hierarchy Graph		Graph showing a top-down view of an organization


4.6.3.1.1.1 Fit Screen

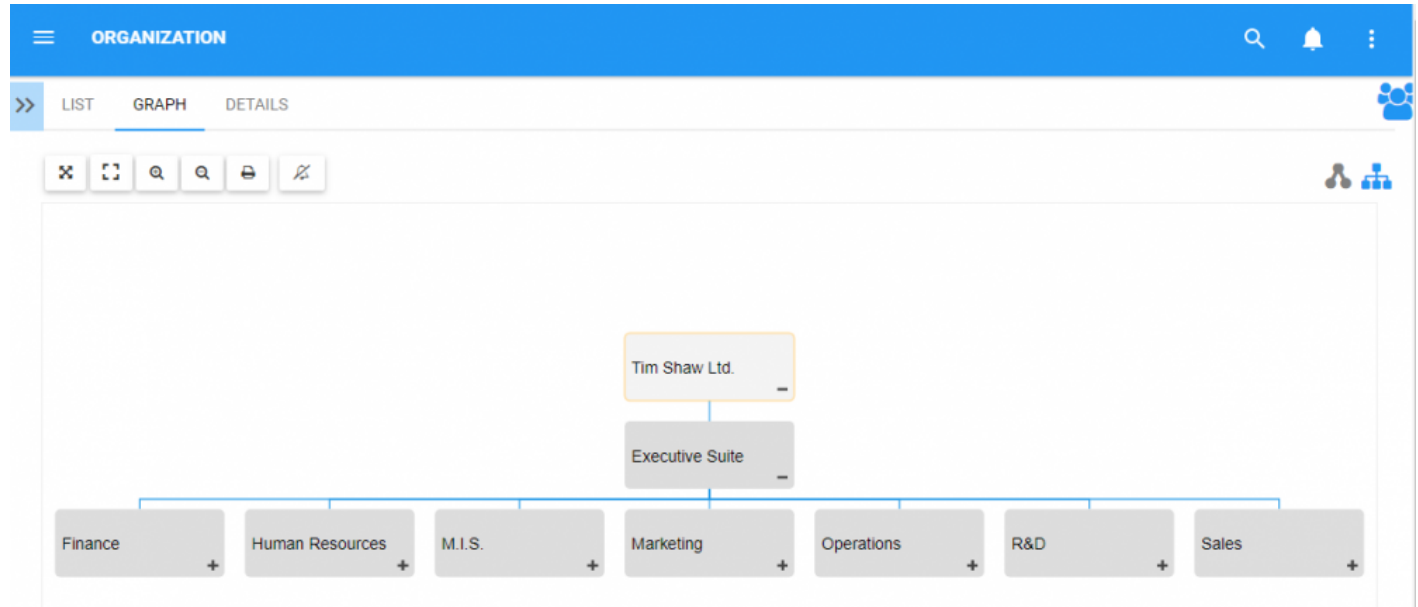
The fit screen function has been implemented to assist users at replacing and re-centering the window.

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.





4. Click on button  and the page will be reset

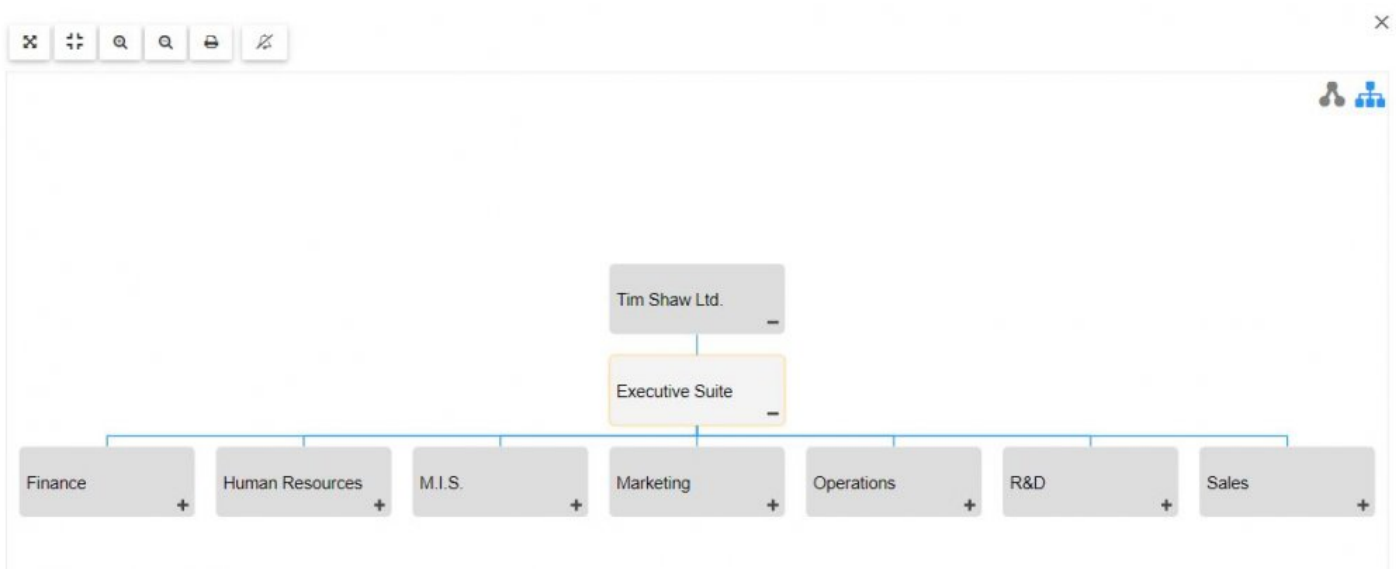



4.6.3.1.1.2 Full Screen

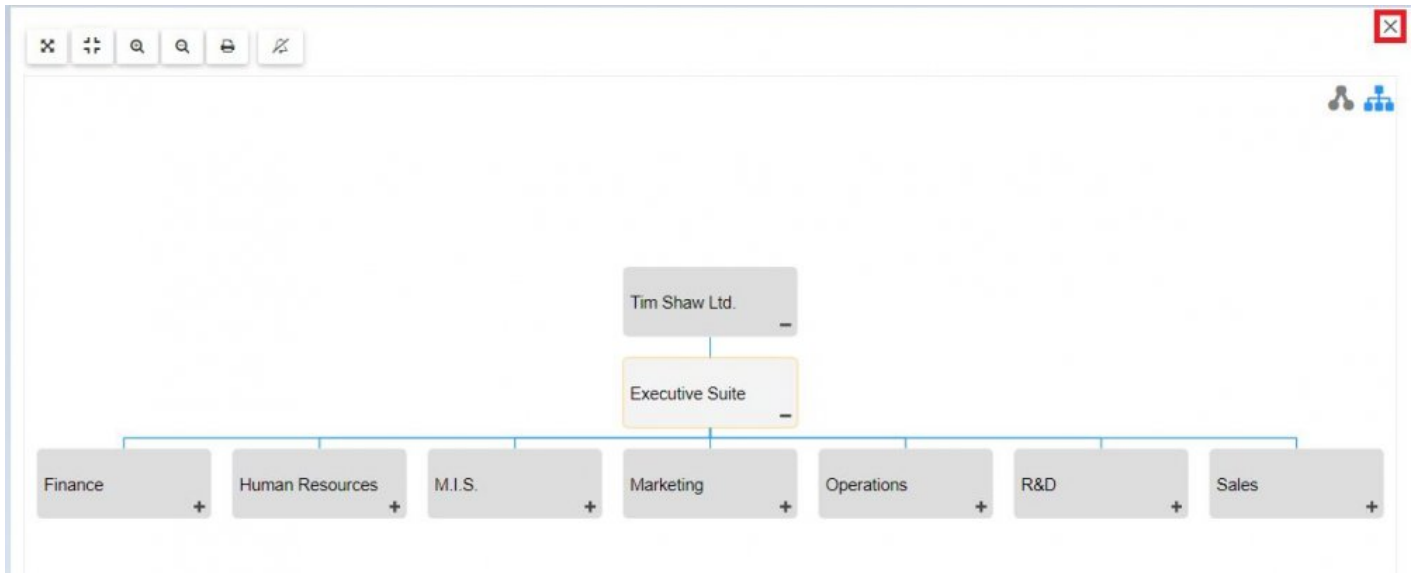
The full screen function has been implemented to assist users at viewing Organizational items, utilizing the full screen of a user.

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”





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



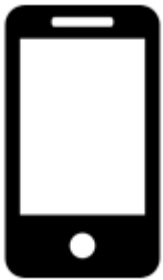
4.6.3.1.1.3 Zoom In

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.

4.6.3.1.1.4 Zoom Out

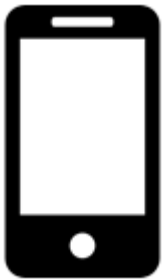
The zoom function has been implemented to assist users in viewing specific items within selected Organization items.

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

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

Print Settings

General

A

Print Mode:Single Page

B

Page Layout:Landscape

C

Page Size:Letter

Multi page print only

D

Graph Layout:Left to Right

Close

Print

Setting	Options	Description
Print Mode	a. Single Page b. Multi Page	Fit the displayed content over a single page Spread the displayed content over multiple pages
Print Layout	a. Landscape b. Portrait	Landscape (“Sideways”) page orientation Portrait (“Top-Down”) page orientation
Page Size	a. Letter b. Legal	8.5 × 11.0 in (216 × 279 mm) 8.5 × 14.0 in (216 × 356 mm)

	c. A3 d. A4	11.7 × 16.54 in (297 × 420 mm) 8.3 × 11.7 in (210 × 297 mm)
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

Print Settings ×

General

Print Mode:

Single Page

Page Layout:

Landscape

Page Size:

Letter

Multi page print only

Graph Layout:

Left to Right

Close

Print

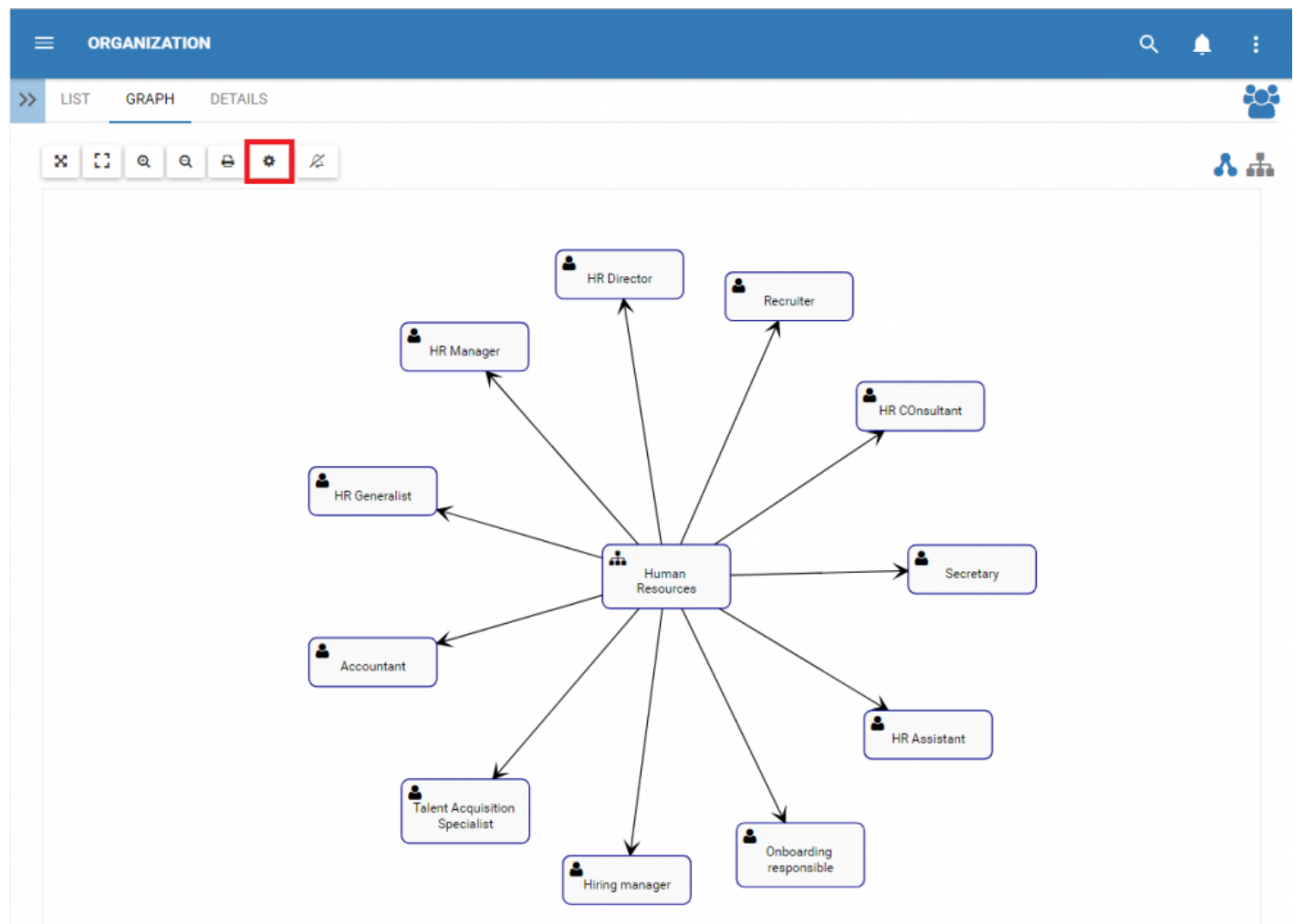
4.6.3.1.1.6 Options

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.

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




Map options ×

General —

Filter: ASSET, ATTRIBUTE, (▼

Reset to Default **Close** **Save changes**

To customize the graph and use the Filter option, please see the steps below:

1. Select “Options” icon 
2. Navigate cursor to “Asset, Attribute”



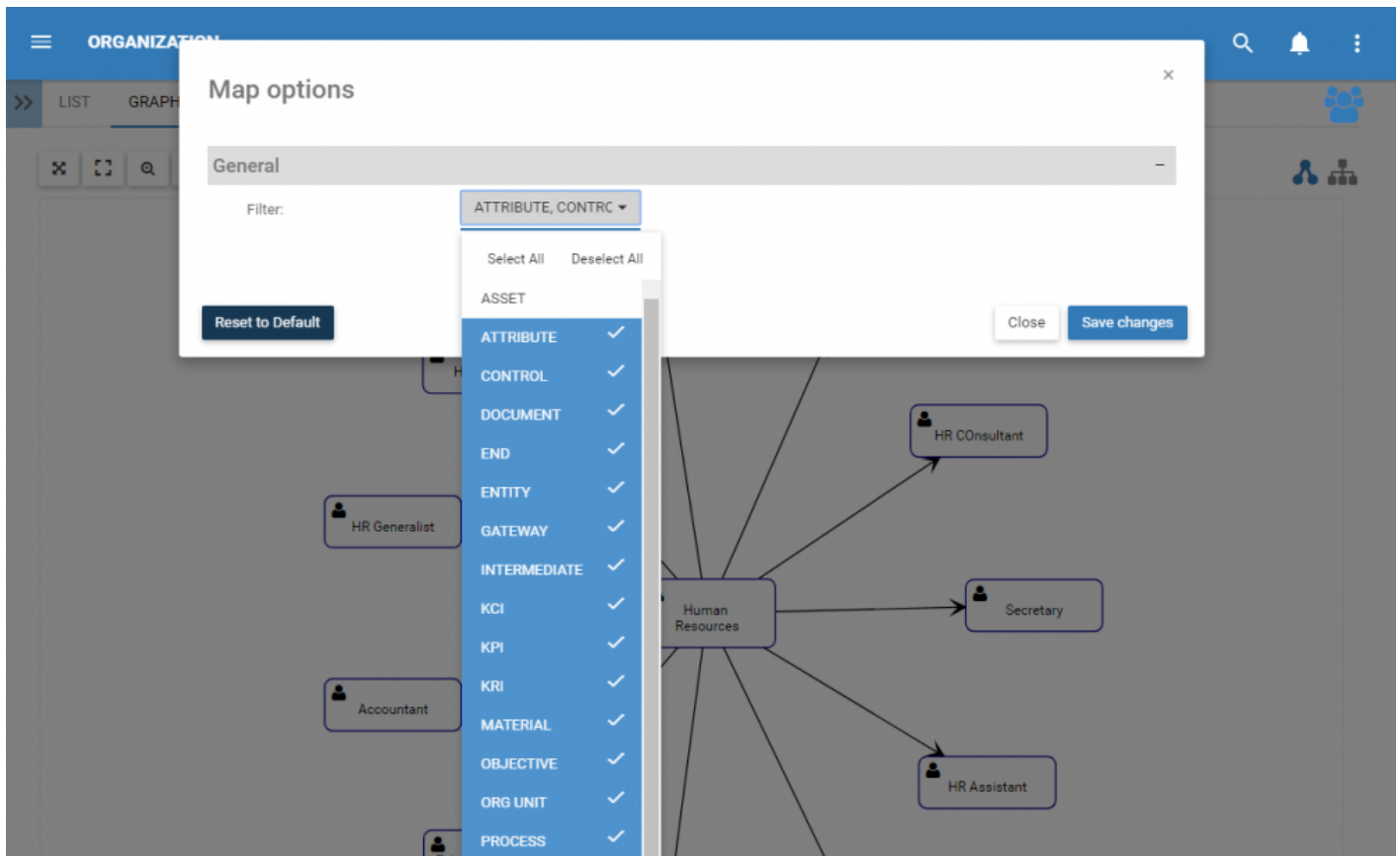
Map options ×

General —

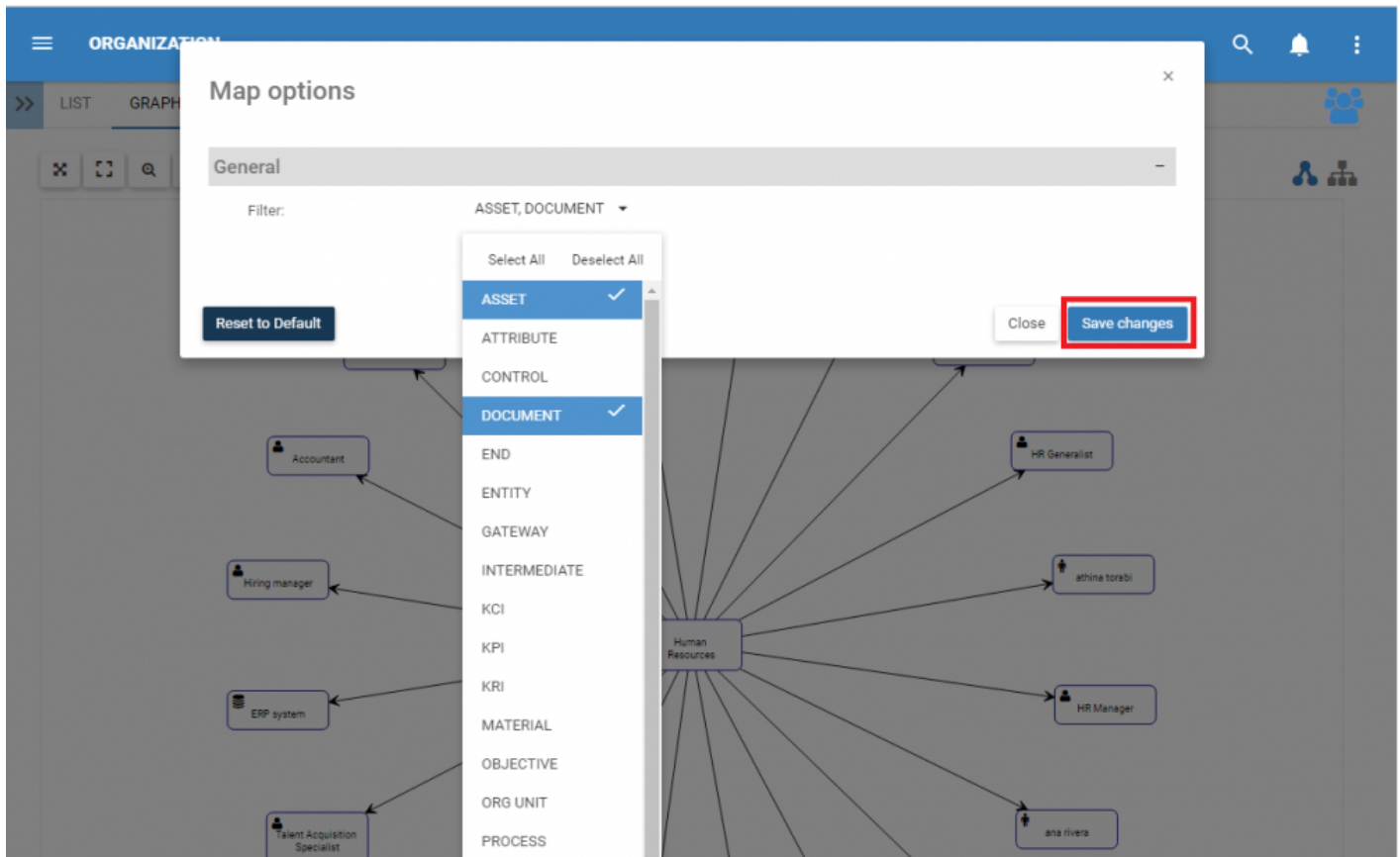
Filter: **ASSET, ATTRIBUTE, (▼**

Reset to Default **Close** **Save changes**

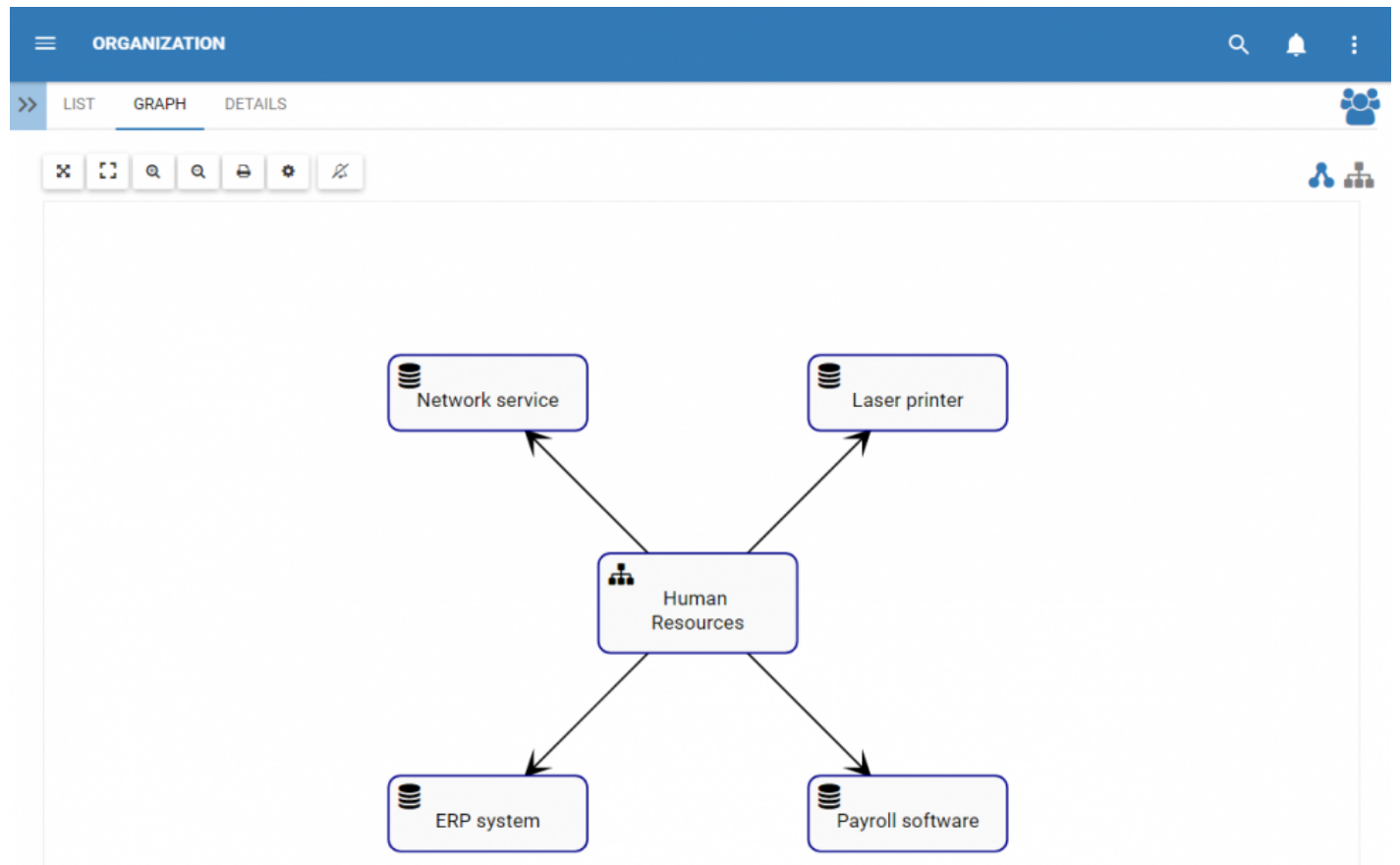
3. The following drop-down menu will be generated




4. Select the desired filter and select "Save Changes". For this example, we will select **Assets** and **Documents**.



5. The following graph will be generating showing only the **Assets** and **Documents** that are related to the specific **Organization Unit**






4.6.3.1.1.7 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.

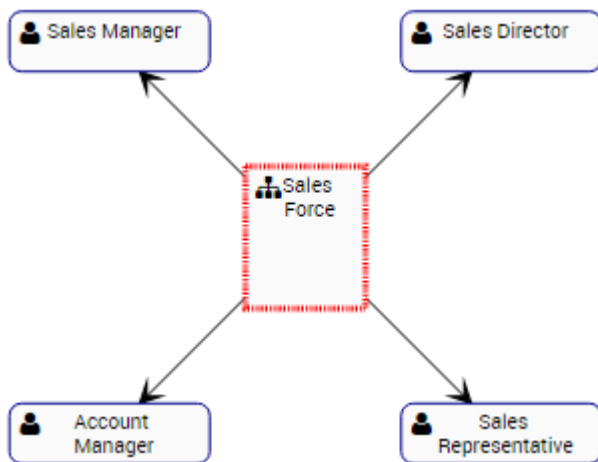
To use the Subscribe button, please see the following instructions.

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.

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.

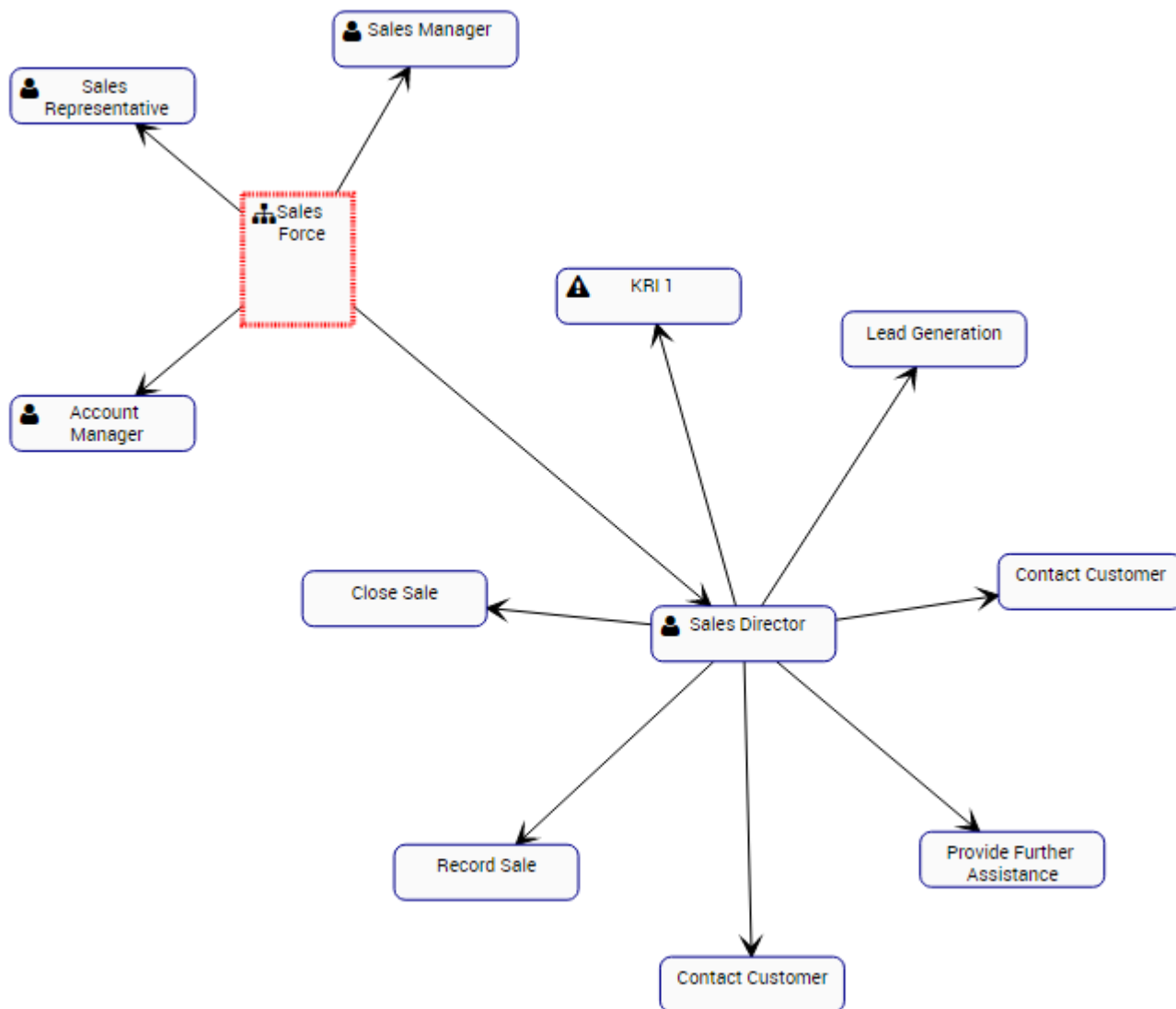
Impact Graph



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.



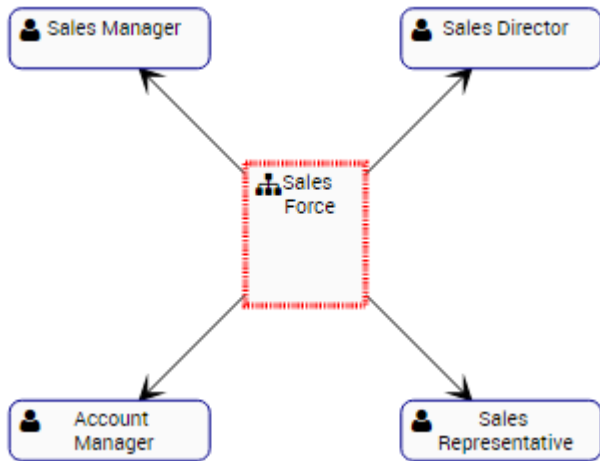
These Impact Graphs can be used to educate business users, to analyze internal business processes and help management optimize activities effectively. Additionally, they help in the preparation of change management plans, allowing managers to map out the effect of any organizational change.

Impact Graph Navigation

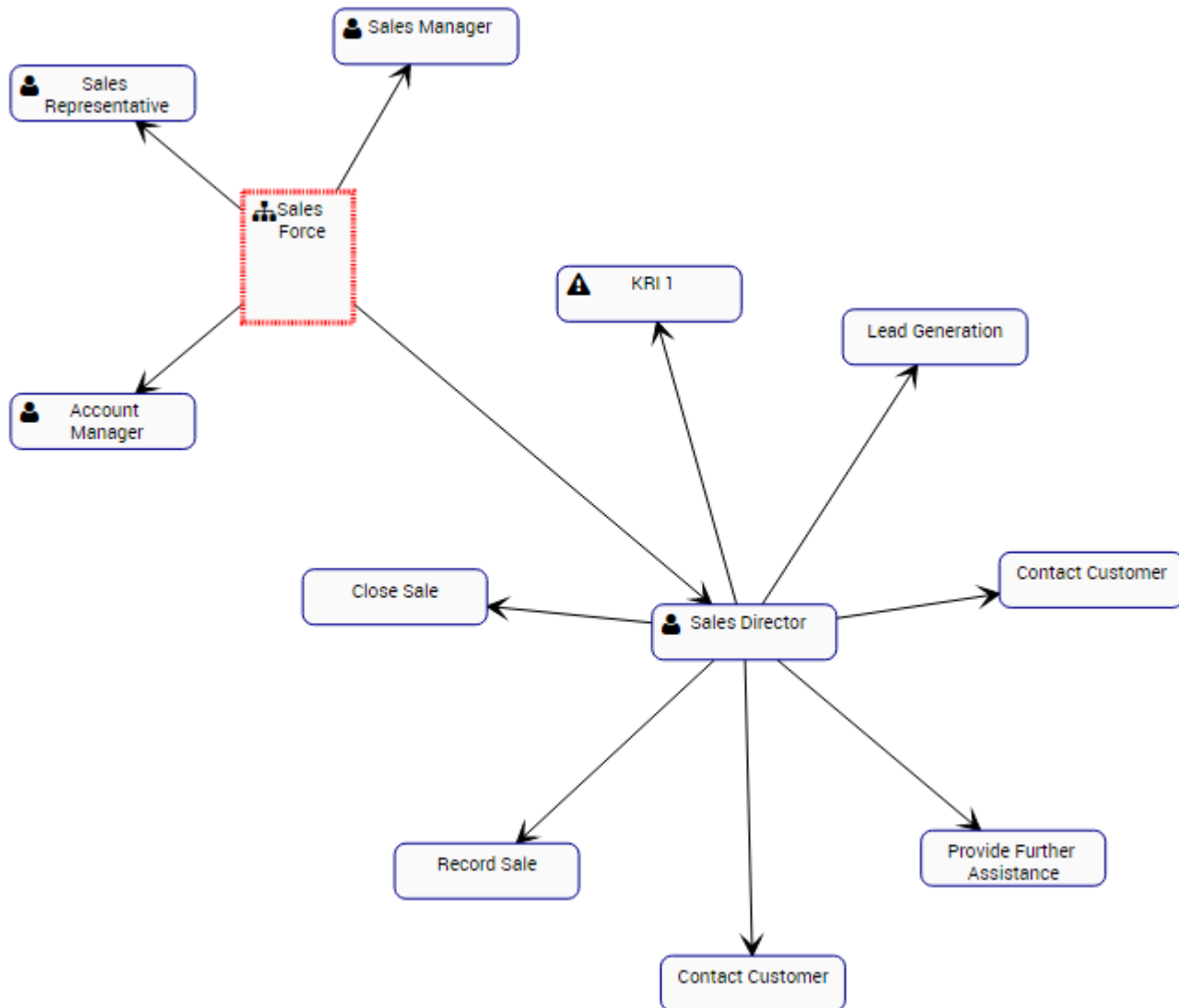
To navigate to Impact Graphs, please see the following instructions.

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 

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



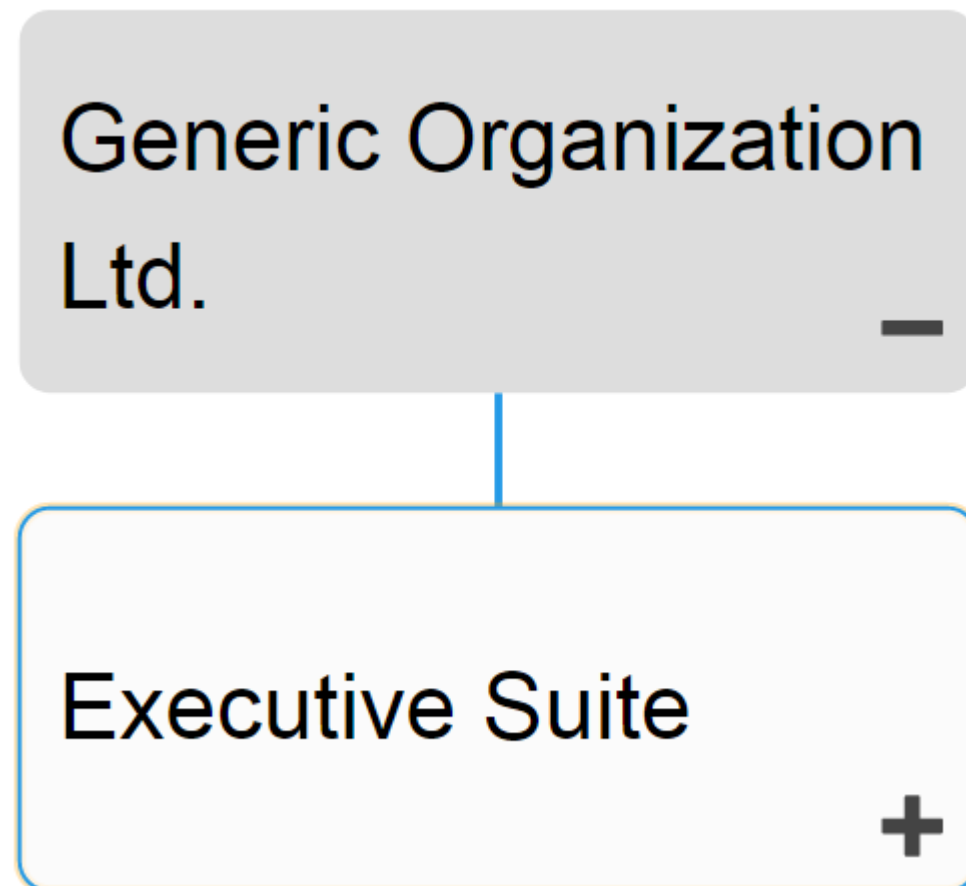
5. (Optional) To further expand the Impact Graph, simply double-click on the item to which you would like to display



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.



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

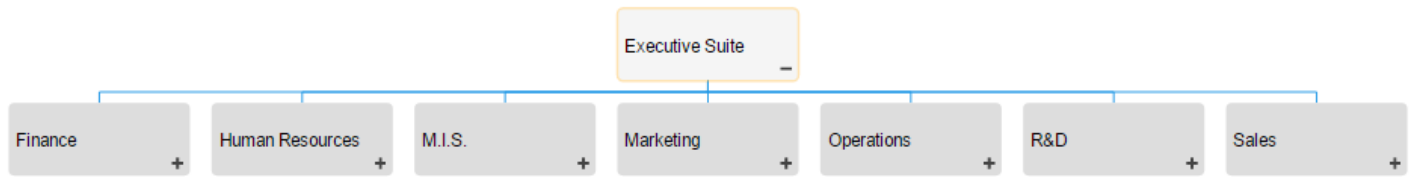
3. Select the “Quick Graph View” icon  of the desired item
4. You will be navigated to the Org Units Hierarchy Graph. The entire set will not be fully displayed upon initial navigation and will display the individual item selected.

Executive Suite




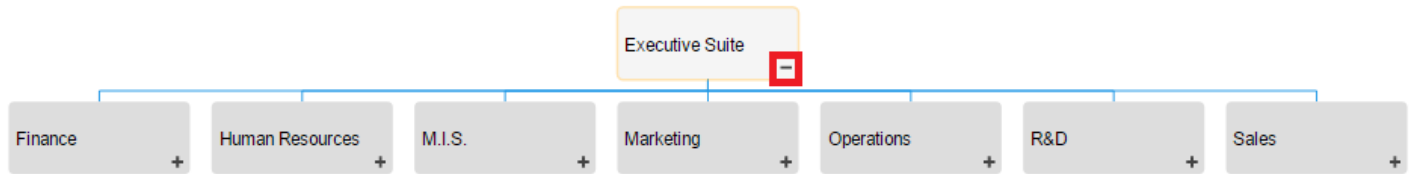


5. To further expand components of the Hierarchy Graph, double click on the  on the objects in the Graph. This will expand the item selected.



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

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



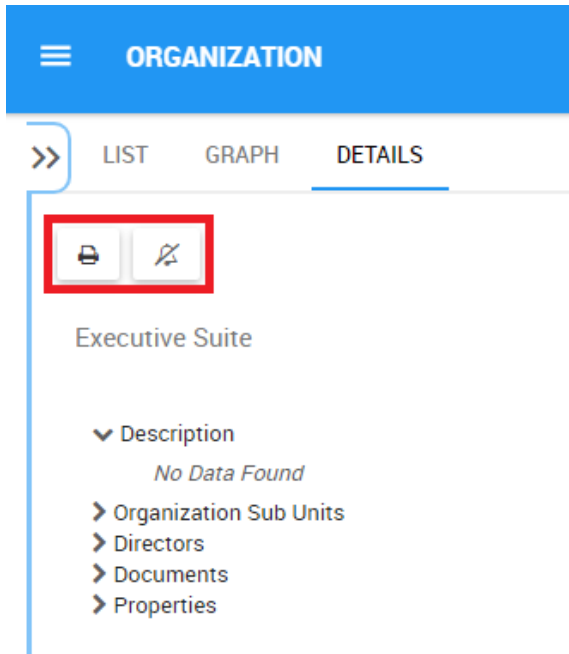
4.6.4 Details

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.



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.



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.

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.

4/20/2017



Interfacing EPC

Executive Suite

04/20/2017

Executive Suite

▼ Description

No Data Found

➤ Organization Sub Units

➤ Directors

➤ Documents

➤ Properties

Published


NOT CONTROLLED IF PRINTED



Version Number : 1.00

http://epc10red.interfacing.com/organization/details/DFD9B187-A23C-4160-9D41-26AFF5F38B50?modeType=ORG_UNIT

1/1

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  .

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

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.

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.

▼ Organization Sub Units

-  [Finance](#)
-  [Human Resources](#)
-  [M.I.S.](#)
-  [Marketing](#)
-  [Operations](#)
-  [R&D](#)
-  [Sales](#)

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

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 as 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.

▼ Documents






 [Interest Questionnaire \(DOCX\)](#)  

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)

<ul style="list-style-type: none"> • 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

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

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.

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

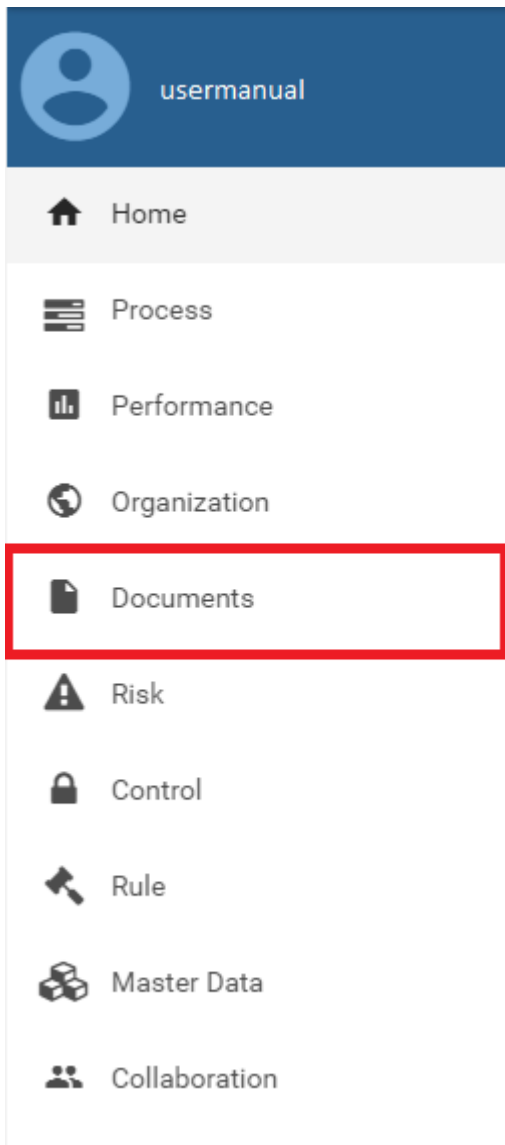
Documents that have been published from the EPC Modeler can be viewed in this module.

How to access the Documents module:

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



2. Click on **Documents**



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

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

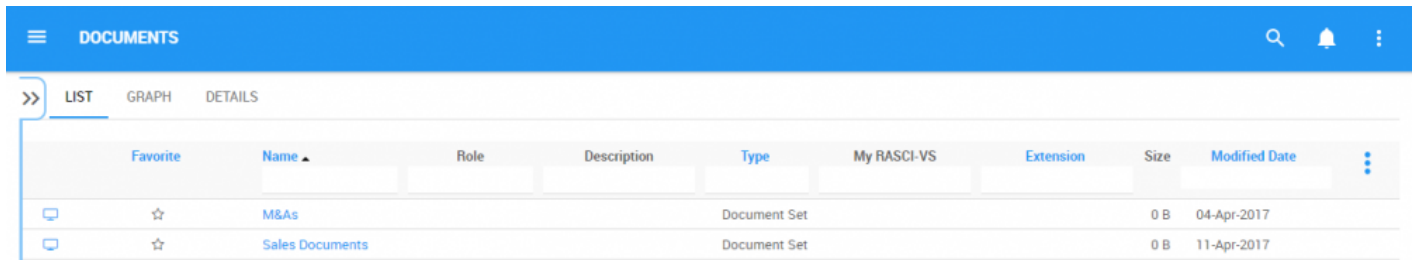
Component	Description
Favorite	Allows users to sort processes by favorites vs. non-favorites
Name	Textual search for any existing name of an object
Roles	Whether or not there are Roles directly associated with the item in question
Description	Whether or not there is a Description inputted for the item 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.

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

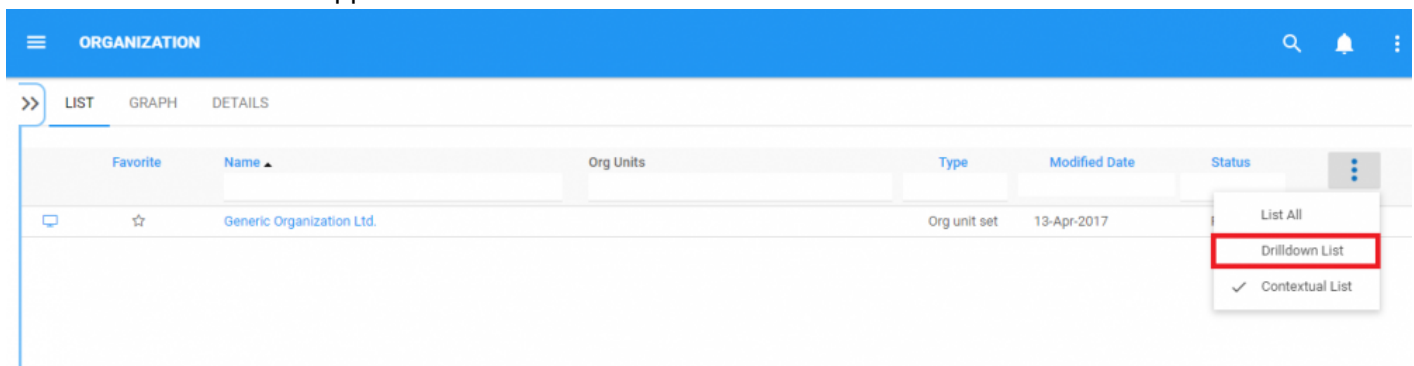
1. Click on the **Navigation Menu Button** on the top left of your screen
2. Click on **Documents**
3. You will be directed to **List View** in the Documents module (as seen below).



Favorite	Name	Role	Description	Type	My RASCI-VS	Extension	Size	Modified Date
☆	M&As			Document Set			0 B	04-Apr-2017
☆	Sales Documents			Document Set			0 B	11-Apr-2017

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.



Favorite	Name	Org Units	Type	Modified Date	Status
☆	Generic Organization Ltd.		Org unit set	13-Apr-2017	

List All
Drilldown List
Contextual List

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

DOCUMENTS

>>

LIST

GRAPH

DETAILS

	Favorite		Name ▲	Role	Description	Type	My RASCI-VS	Extension	Size	Modified Date	
	☆		Acquisition Model #1	2		Document		xlsx	9.32 KB	11-Apr-2017	
	☆		Acquisition Model #2	2		Document		xlsx	9.35 KB	11-Apr-2017	
	☆		Acquisition Model #3	2		Document			0 B	11-Apr-2017	
	☆		Acquisition Model #4	2		Document			0 B	11-Apr-2017	
	☆		Acquisition Model #5	2		Document			0 B	11-Apr-2017	
	☆		Acquisition Model #6	2		Document			0 B	11-Apr-2017	
	☆		Customer Approach Guide			Document			0 B	11-Apr-2017	
	☆		Financial Models			Document Folder			0 B	04-Apr-2017	

✿ 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.

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

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

DOCUMENTS

>>

LIST

GRAPH

DETAILS

	Favorite	Name	Role	Description	Type	My RASCI-VS	Extension	Size	Modified Date	
			2		Document		xlsx	9.32 KB	11-Apr-2017	
			2		Document		xlsx	9.35 KB	11-Apr-2017	
			2		Document			0 B	11-Apr-2017	
			2		Document			0 B	11-Apr-2017	
			2		Document			0 B	11-Apr-2017	
			2		Document			0 B	11-Apr-2017	
					Document			0 B	11-Apr-2017	
					Document Folder			0 B	04-Apr-2017	
			2		Document			0 B	04-Apr-2017	

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:

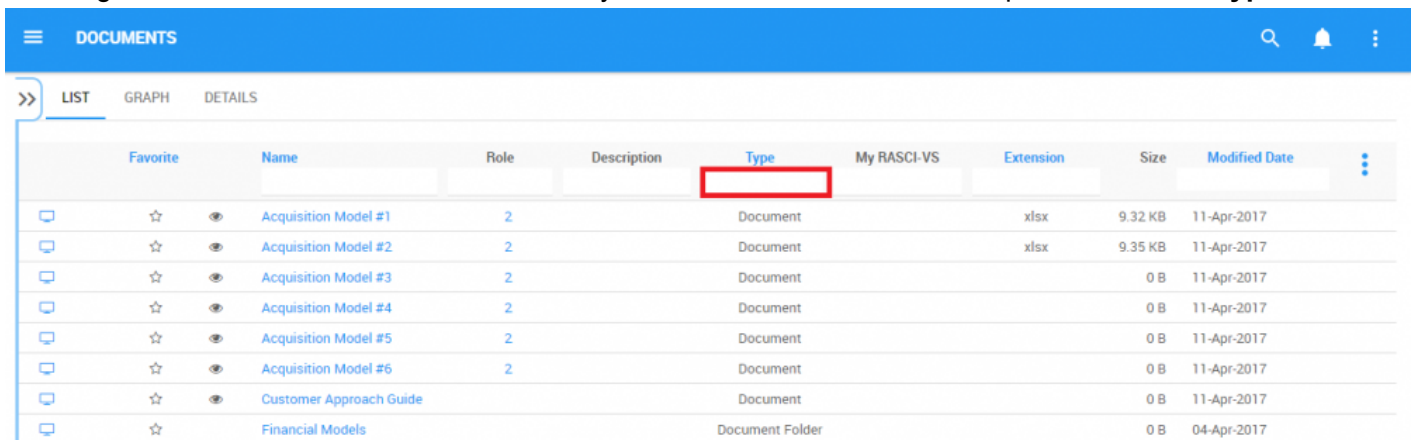
1. [How to Add Filters](#)
2. [How to Remove Filters](#)
3. [How to Combine Filters](#)

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**.

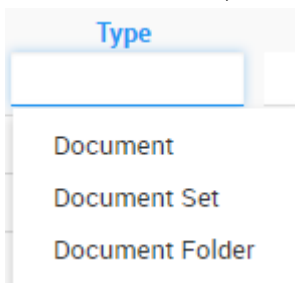
How to Add Filter

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



DOCUMENTS									
LIST GRAPH DETAILS									
	Favorite	Name	Role	Description	Type	My RASCI-VS	Extension	Size	Modified Date
	☆	Acquisition Model #1	2		Document		xlsx	9.32 KB	11-Apr-2017
	☆	Acquisition Model #2	2		Document		xlsx	9.35 KB	11-Apr-2017
	☆	Acquisition Model #3	2		Document			0 B	11-Apr-2017
	☆	Acquisition Model #4	2		Document			0 B	11-Apr-2017
	☆	Acquisition Model #5	2		Document			0 B	11-Apr-2017
	☆	Acquisition Model #6	2		Document			0 B	11-Apr-2017
	☆	Customer Approach Guide			Document			0 B	11-Apr-2017
	☆	Financial Models			Document Folder			0 B	04-Apr-2017

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



3. Select the desired filter. For this example, we will select **Document** and **Document Set**.

DOCUMENTS

>>

LIST

GRAPH

DETAILS

	Favorite		Name	Role	Description	Type	My RASCI-VS	Extension	Size	Modified Date	
						Document x Document Set x					
			Acquisition Model #1	2		Document		xlsx	9.32 KB	11-Apr-2017	
			Acquisition Model #2	2		Document		xlsx	9.35 KB	11-Apr-2017	
			Acquisition Model #3	2		Document			0 B	11-Apr-2017	
			Acquisition Model #4	2		Document			0 B	11-Apr-2017	
			Acquisition Model #5	2		Document			0 B	11-Apr-2017	
			Acquisition Model #6	2		Document			0 B	11-Apr-2017	
			Customer Approach Guide			Document			0 B	11-Apr-2017	
			Industry Report #1	2		Document			0 B	04-Apr-2017	
			Industry Report #3	2		Document			0 B	04-Apr-2017	
			Interest Questionnaire			Document		docx	12.36 KB	11-Apr-2017	
			JPG File			Document			0 B	20-Apr-2017	
			M&As			Document Set			0 B	04-Apr-2017	
			PNG File			Document			0 B	20-Apr-2017	
			Sales Documents			Document Set			0 B	11-Apr-2017	

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.

DOCUMENTS

>>

LIST

GRAPH

DETAILS

Favorite	Name	Role	Description	Type	My RASCI-VS	Extension	Size	Modified Date	
				Document x					
				Document Se					
	☆		Acquisition Model #1	2	Document	xlsx	9.32 KB	11-Apr-2017	
	☆		Acquisition Model #2	2	Document	xlsx	9.35 KB	11-Apr-2017	
	☆		Acquisition Model #3	2	Document		0 B	11-Apr-2017	
	☆		Acquisition Model #4	2	Document		0 B	11-Apr-2017	
	☆		Acquisition Model #5	2	Document		0 B	11-Apr-2017	
	☆		Acquisition Model #6	2	Document		0 B	11-Apr-2017	
	☆		Customer Approach Guide		Document		0 B	11-Apr-2017	
	☆		Industry Report #1	2	Document		0 B	04-Apr-2017	
	☆		Industry Report #3	2	Document		0 B	04-Apr-2017	


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.

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.

DOCUMENTS									
>> LIST GRAPH DETAILS									
Favorite	Name	Role	Description	Type	My RASCI-VS	Extension	Size	Modified Date	
				Document x					
				Document Set x					
	☆	👁	Acquisition Model #1	2		xlsx	9.32 KB	11-Apr-2017	
	☆	👁	Acquisition Model #2	2		xlsx	9.35 KB	11-Apr-2017	
	☆	👁	Acquisition Model #3	2			0 B	11-Apr-2017	
	☆	👁	Acquisition Model #4	2			0 B	11-Apr-2017	
	☆	👁	Acquisition Model #5	2			0 B	11-Apr-2017	
	☆	👁	Acquisition Model #6	2			0 B	11-Apr-2017	
	☆	👁	Customer Approach Guide				0 B	11-Apr-2017	
	☆	👁	Industry Report #1	2			0 B	04-Apr-2017	
	☆	👁	Industry Report #3	2			0 B	04-Apr-2017	

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.

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](#))




















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.

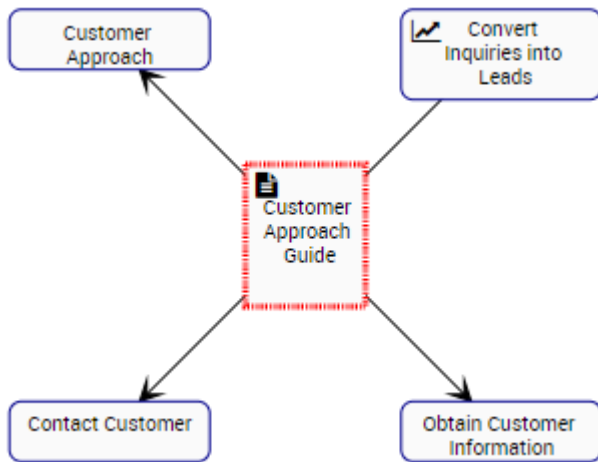
This section will outline Manual Navigation. Please see [Quick Graph View](#) section above for alternative navigation options.

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

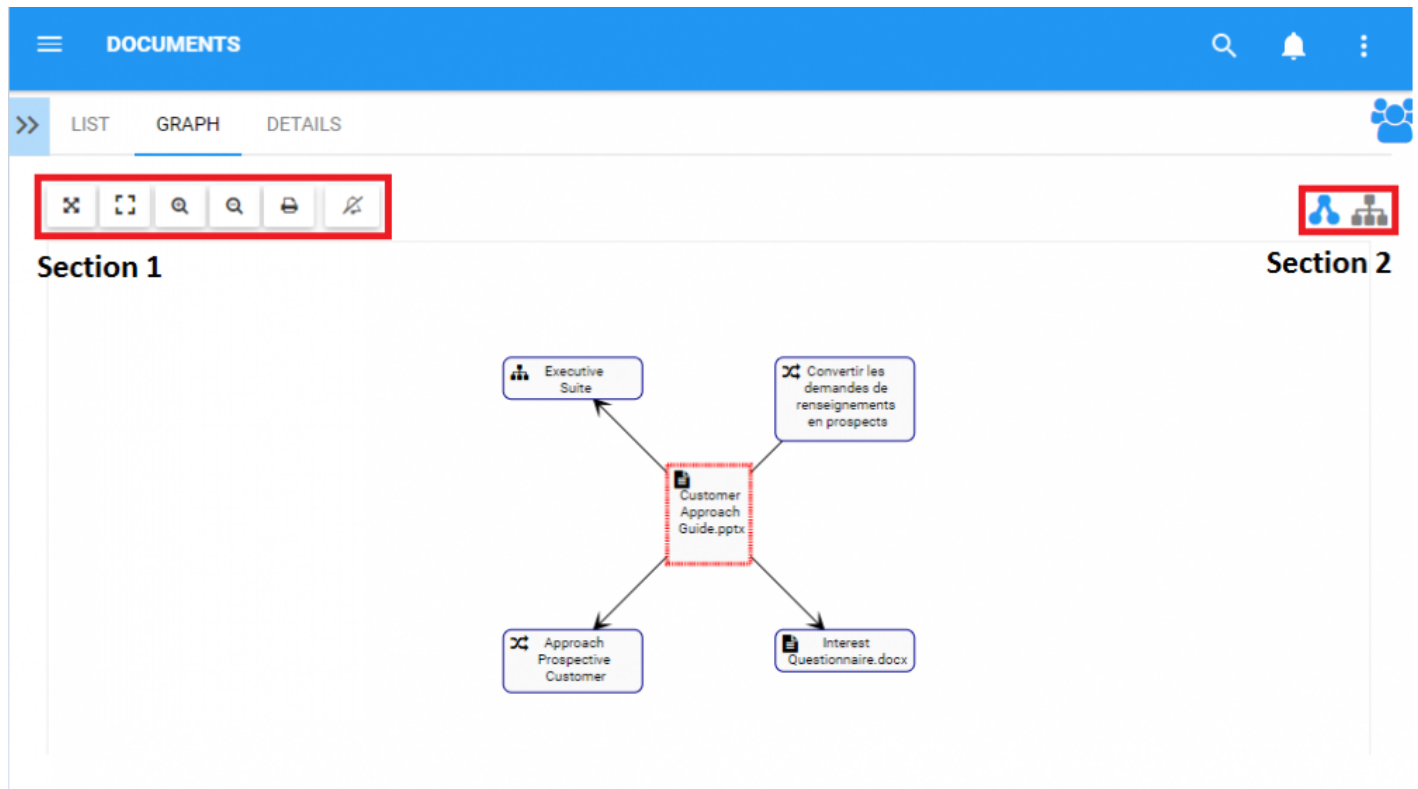
DOCUMENTS									
<div> <div>>></div> <div>LIST</div> <div>GRAPH</div> <div>DETAILS</div> </div>									
Favorite	Name	Role	Description	Type	My RASCI-VS	Extension	Size	Modified Date	
  ☆	Acquisition Model #1	2		Document	A	xlsx	9.32 KB	11-Apr-2017	
  ☆	Acquisition Model #2	2		Document	A	xlsx	9.35 KB	11-Apr-2017	
 ☆ 	Acquisition Model #3	2		Document	A		0 B	11-Apr-2017	
 ☆ 	Acquisition Model #4	2		Document	R A +		0 B	11-Apr-2017	
 ★ 	Acquisition Model #5	2		Document	R A +		0 B	11-Apr-2017	
 ★ 	Acquisition Model #6	2		Document	R A +		0 B	11-Apr-2017	
 ☆ 	Customer Approach Guide			Document			0 B	11-Apr-2017	
 ☆	Financial Models			Document Folder			0 B	04-Apr-2017	
 ☆ 	Industry Report #1	2		Document			0 B	04-Apr-2017	
 ★ 	Industry Report #3	2		Document			0 B	04-Apr-2017	

4. By default, users will be sent to Impact view as the default Graph view. An example of this view can be seen below.






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

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.

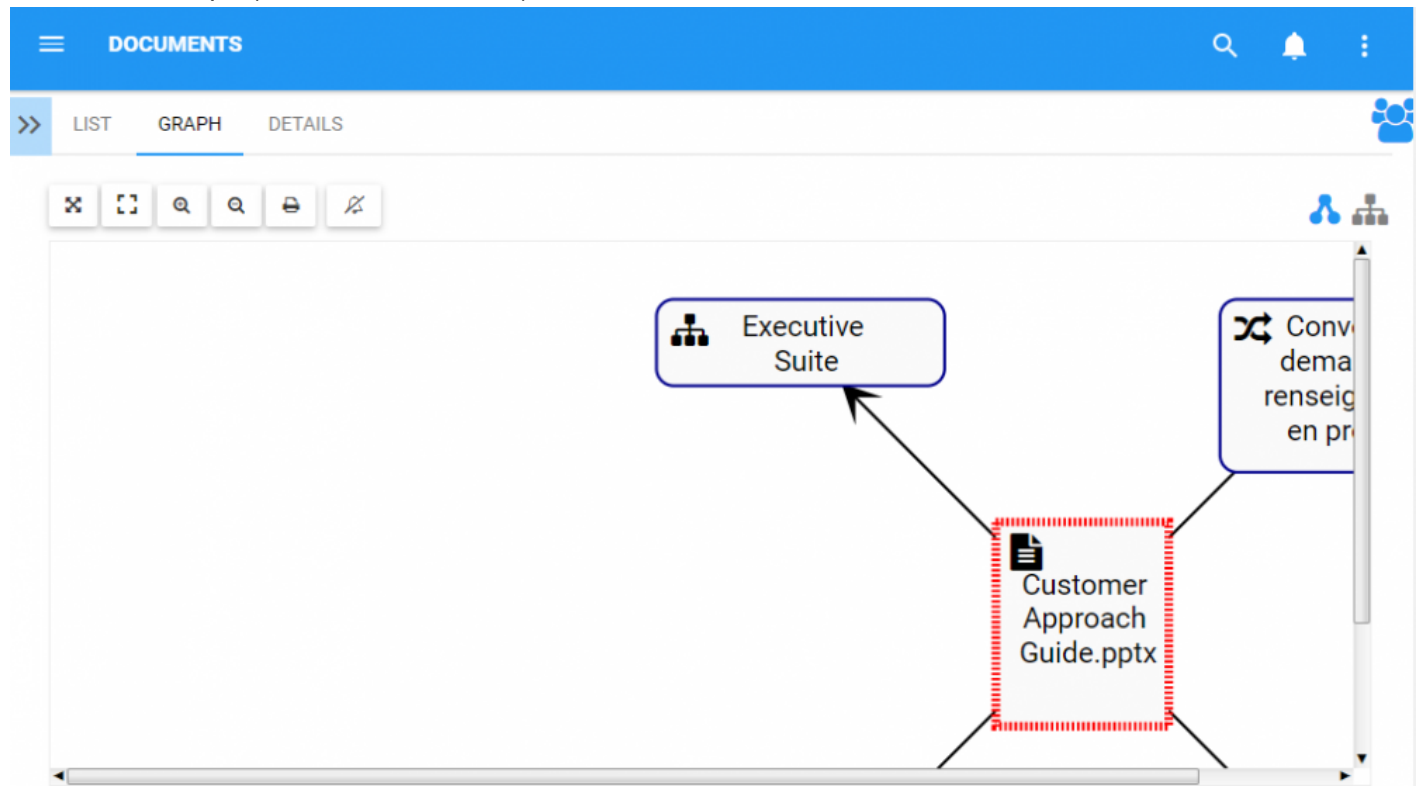
Item	Icon	Description
Impact Graph		Graph showing downstream representation of associated items
Hierarchy Graph		Graph showing a top-down view of items and how they fit within organizations


4.7.3.1.1.1 Fit Screen

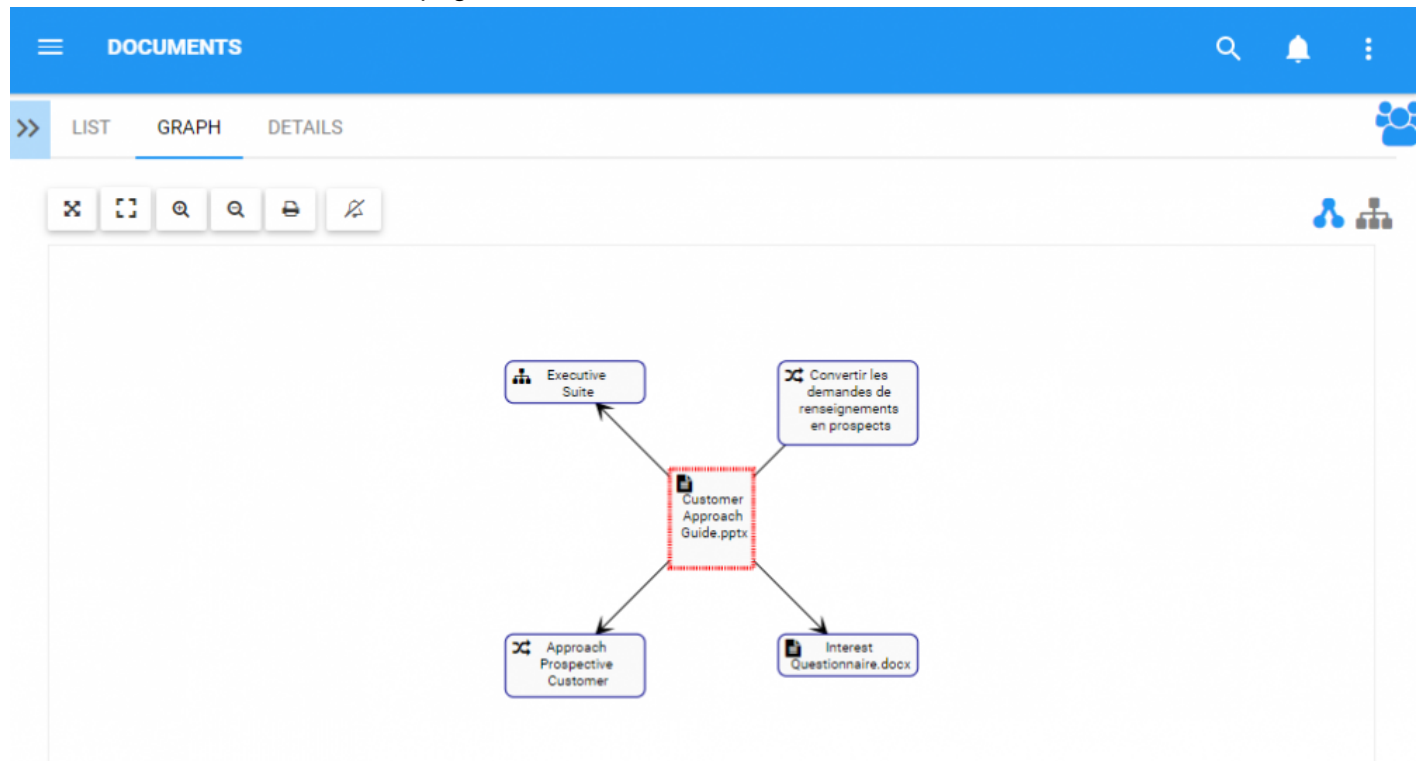
The fit screen function has been implemented to assist users at replacing and re-centering graphs.

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

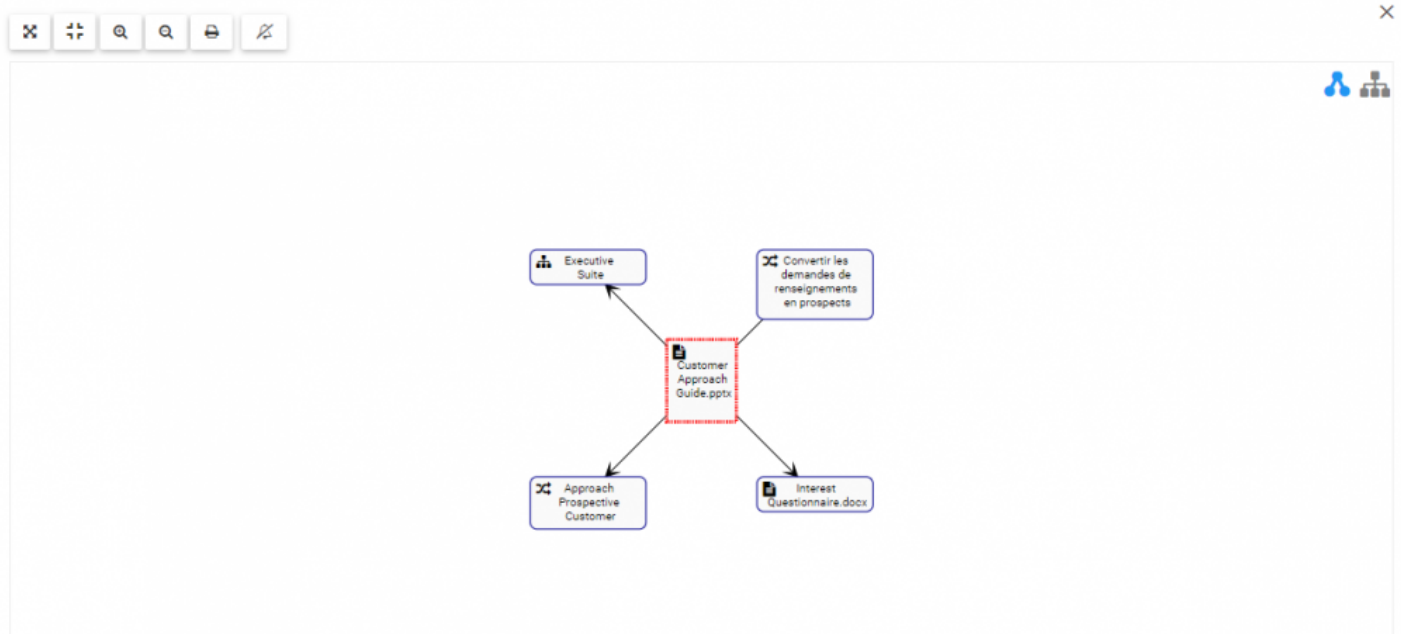



4.7.3.1.1.2 Full Screen

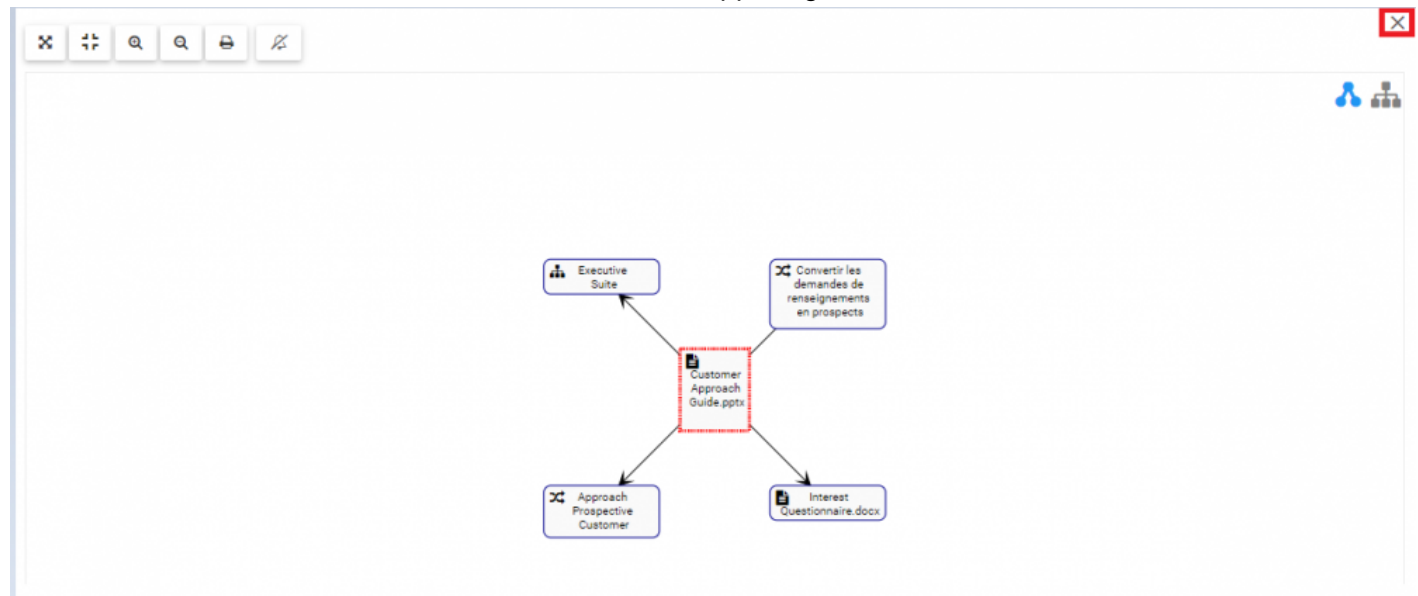
The fit screen function has been implemented to assist users at viewing Graphs, utilizing the full screen of a user.

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”





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



4.7.3.1.1.3 Zoom In

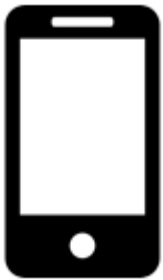
The zoom function has been implemented to assist users in viewing specific items within selected Documents.

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.

4.7.3.1.1.4 Zoom Out

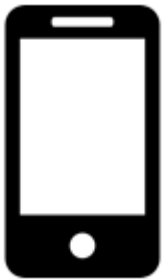
The zoom function has been implemented to assist users in viewing specific items within selected Documents.

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.

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

Print Settings



General

A Print Mode:

B Page Layout: **C** Page Size:

Multi page print only

D Graph Layout:

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 (216 × 279 mm) 8.5 × 14.0 in (216 × 356 mm)

	c. A3 d. A4	11.7 × 16.54 in (297 × 420 mm) 8.3 × 11.7 in (210 × 297 mm)
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

Print Settings ×

General

Print Mode:

Single Page

Page Layout:

Landscape

Page Size:

Letter

Multi page print only

Graph Layout:

Left to Right

Close

Print

4.7.3.1.1.6 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.

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




Map options ×

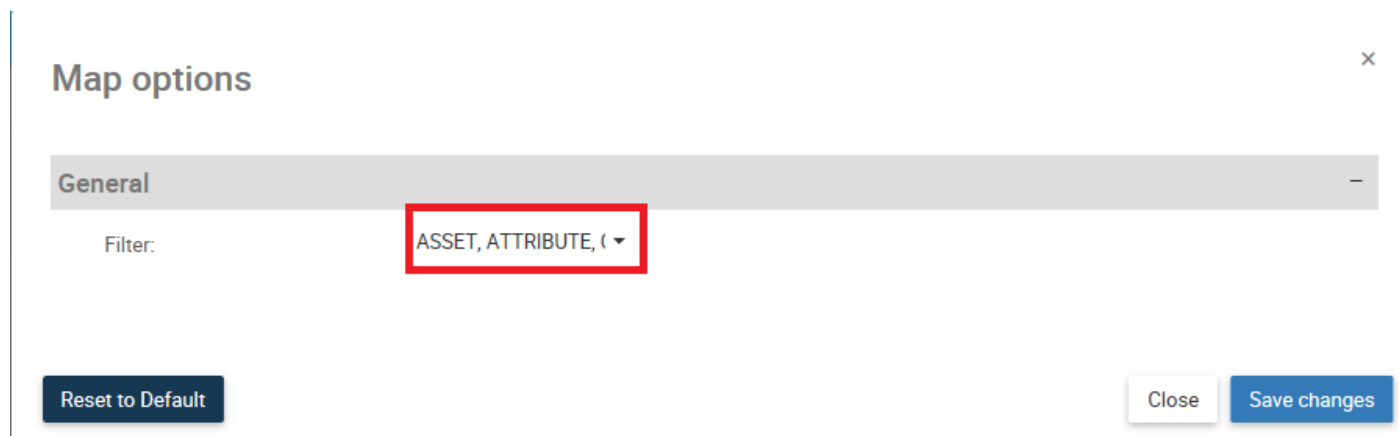
General —

Filter: ASSET, ATTRIBUTE, (▼

Reset to Default **Close** **Save changes**

To customize the graph and use the Filter option, please see the steps below:

1. Select “Options” icon 
2. Navigate cursor to “Asset, Attribute”



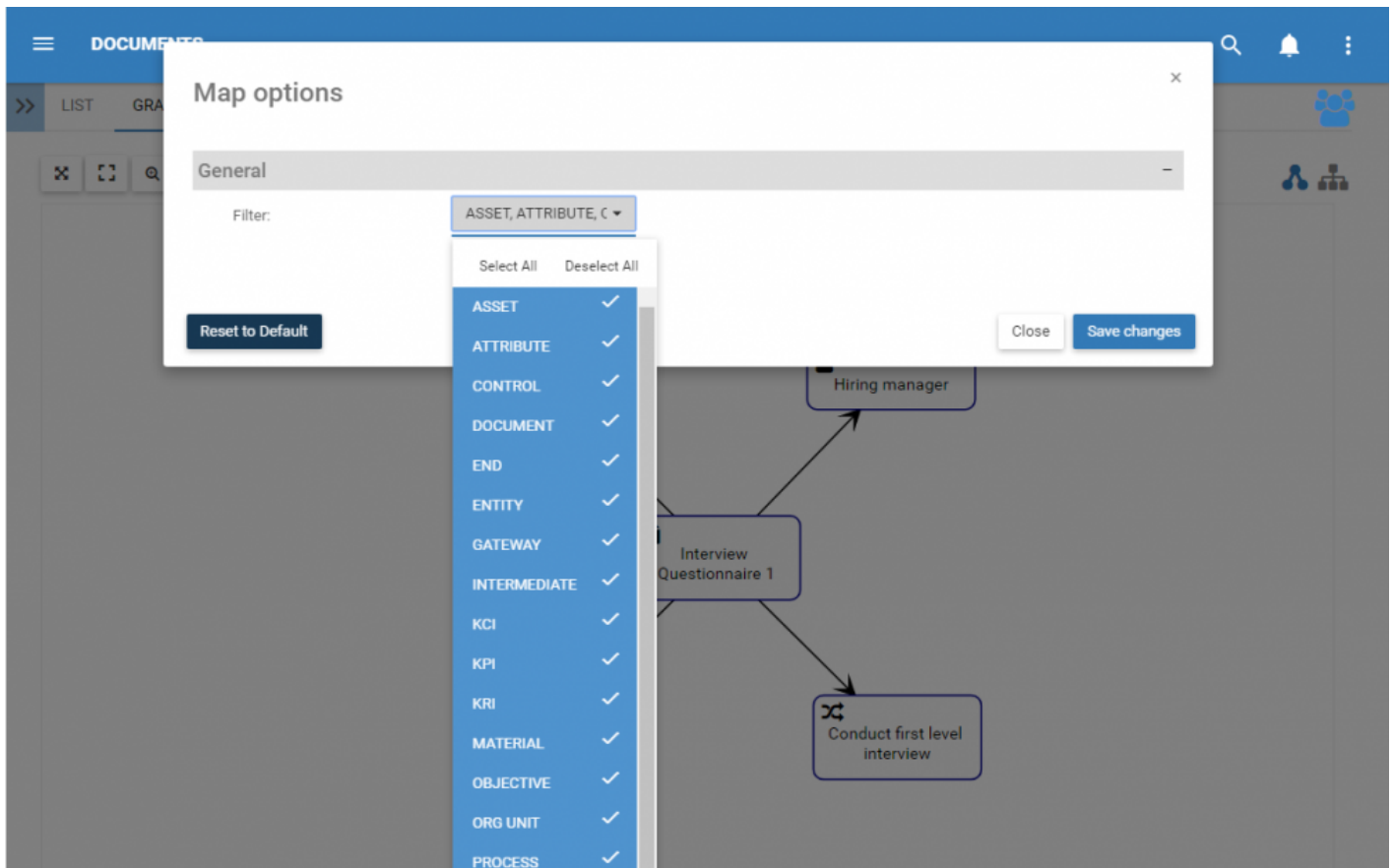
Map options ×

General —

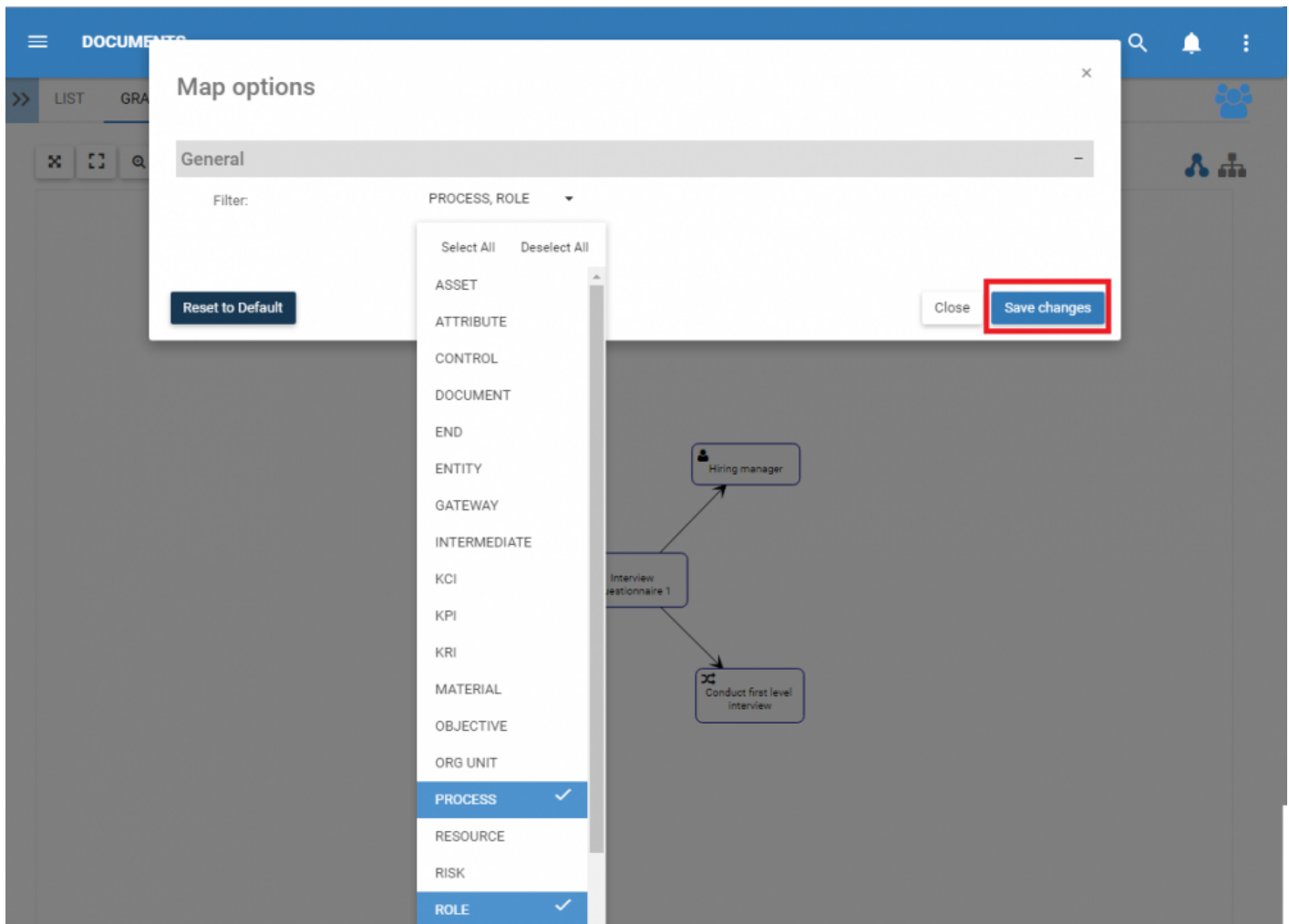
Filter: **ASSET, ATTRIBUTE, (▼**

Reset to Default **Close** **Save changes**

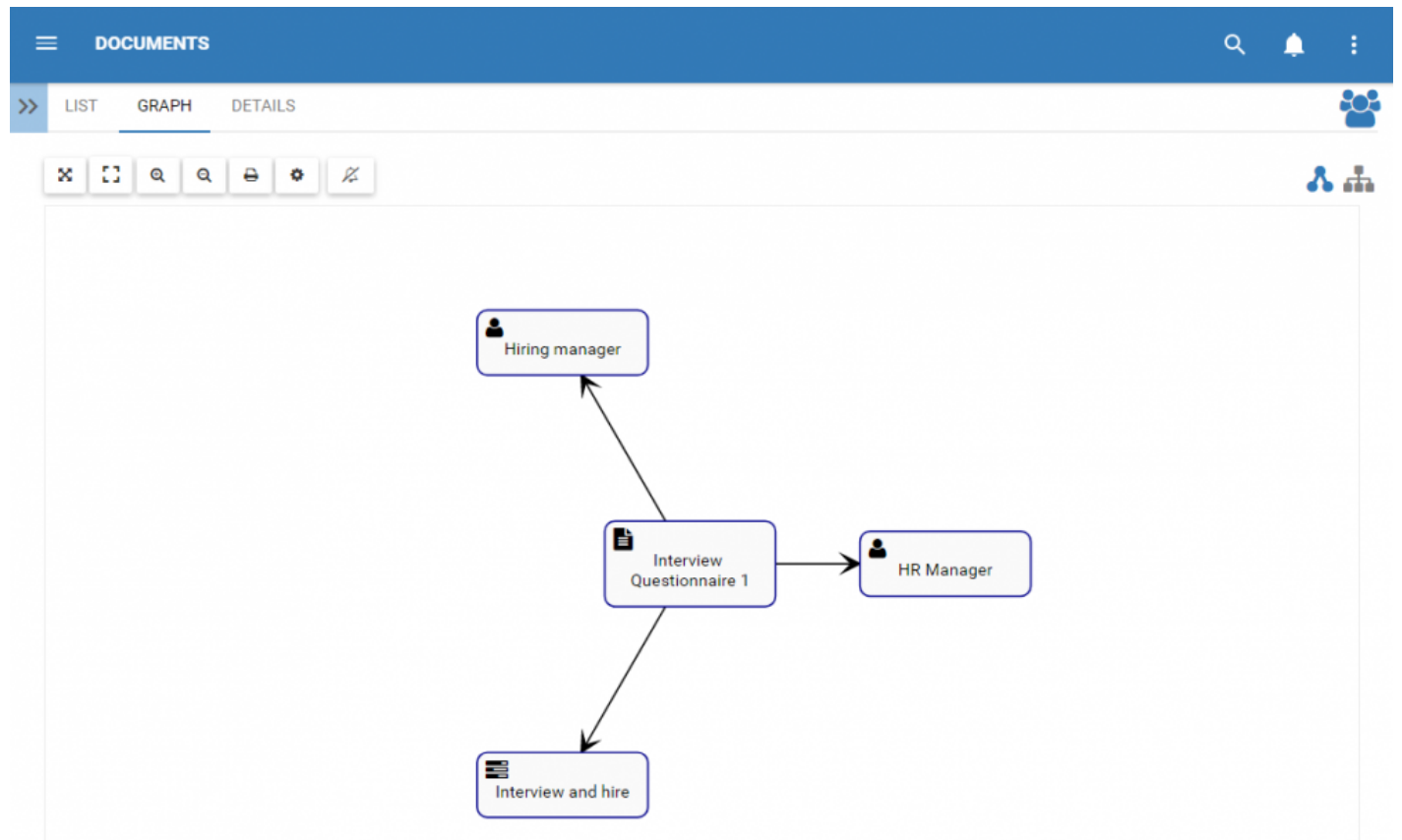
3. The following drop-down menu will be generated




4. Select the desired filter and select “Save Changes”. For this example, we will select **Process** and **Role**.



5. The following graph will be generating showing only the **Processes** and **Roles** that are related to the specific **Document**






4.7.3.1.1.7 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.

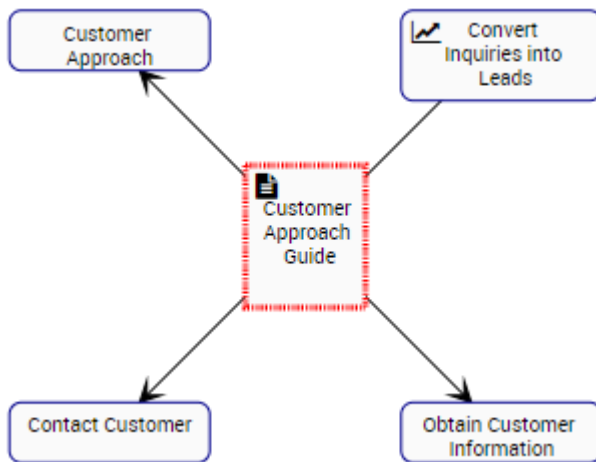
To use the Subscribe button, please see the following instructions.

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.

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

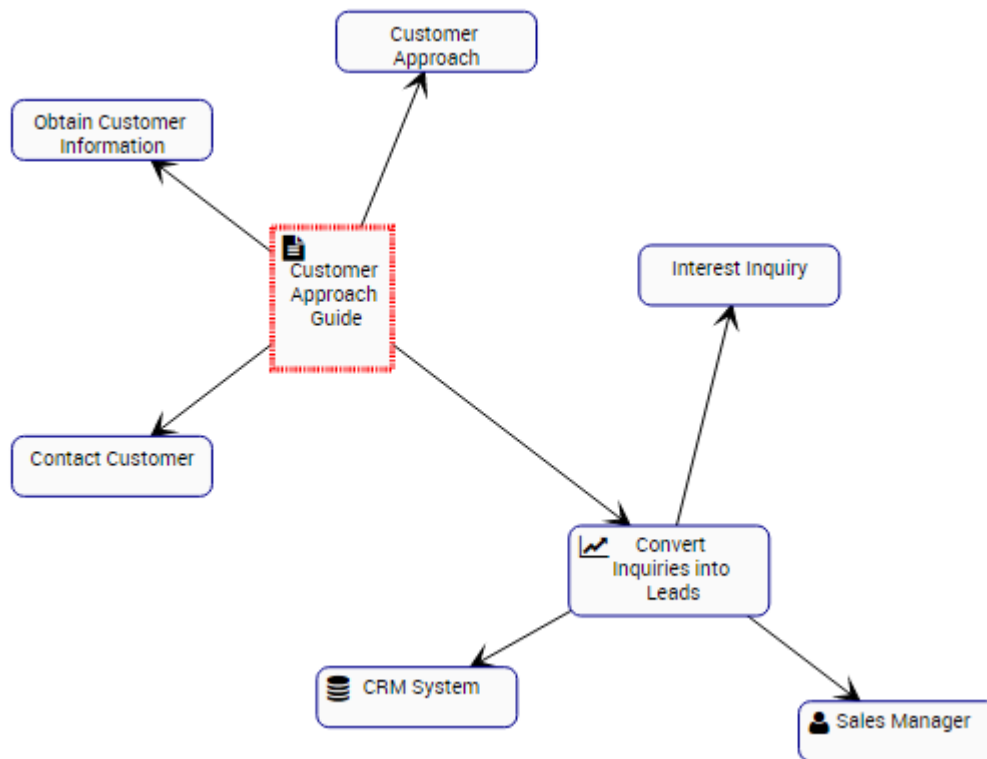


The example features the Impact Graph of the "Customer Approach" Document. The Document itself has 3 processes (Customer Approach, Contact Customer and Obtain Customer Information), as well as a KPI (Convert Inquiries into Leads) associated with it. The specific nature of the items associated is denominated 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


that item.



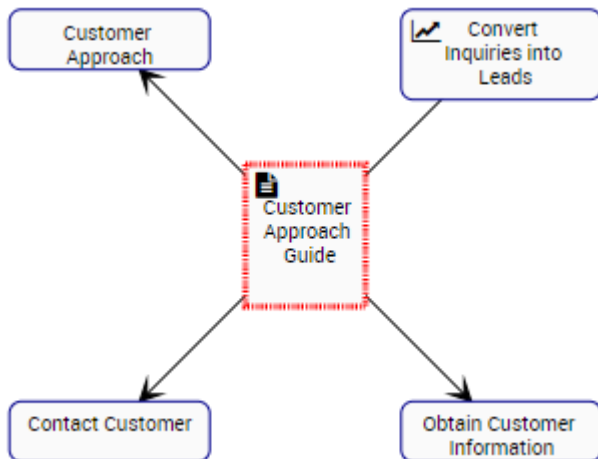
These Impact Graphs can be used to educate business users, to analyze internal business processes and help management optimize activities effectively. Additionally, they help in the preparation of change management plans, allowing managers to map out the effect of any organizational change.

Impact Graph Navigation

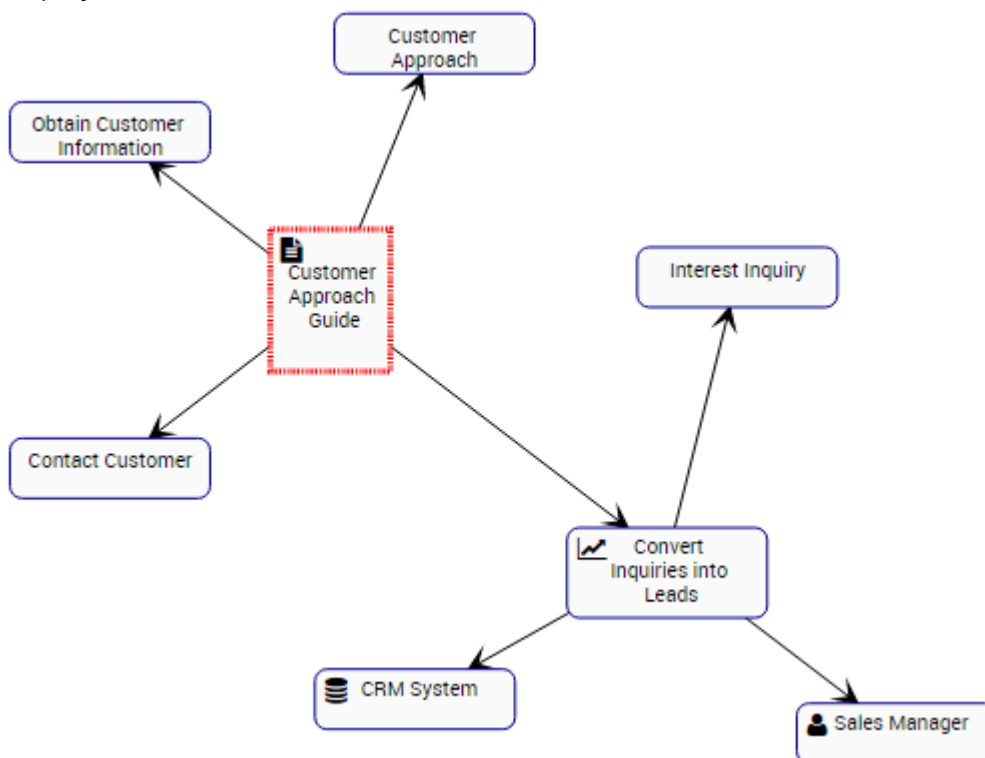
To navigate to Impact Graphs, please see the following instructions.

1. Navigate to a Document within the Documents Module
2. Click on the [Quick Graph View](#) icon 

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



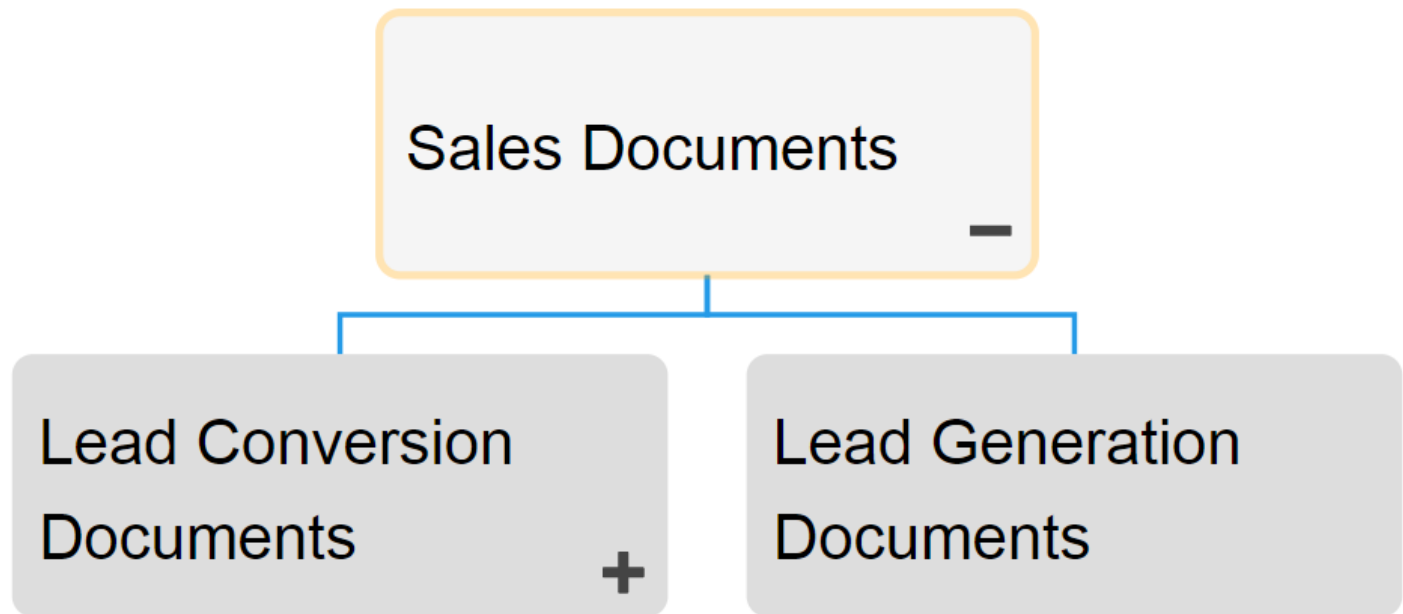
4. (Optional) To further expand the Impact Graph, simply double-click on the item which you would like to display



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.



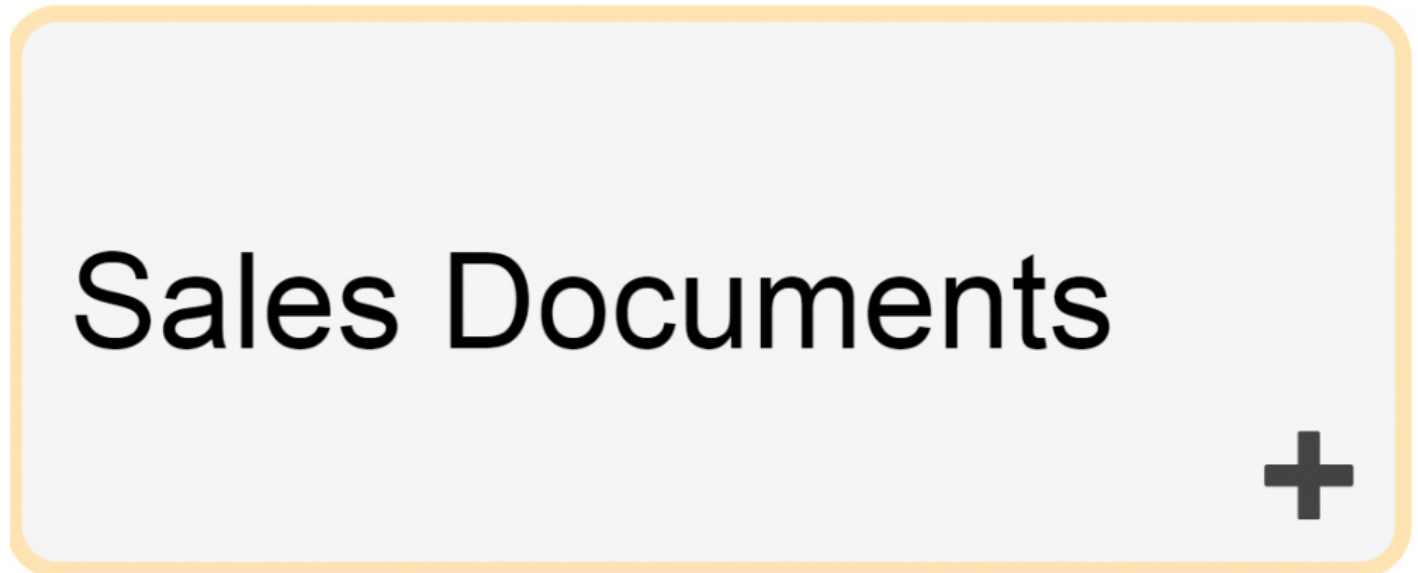
The further you navigate, the more you limit the scope of Hierarchy Graphs. To view a complete picture of organizational structure, select items listed as "Document Folders or Document Sets" in List View


3. Select the [Quick Graph View](#) icon  of the desired item

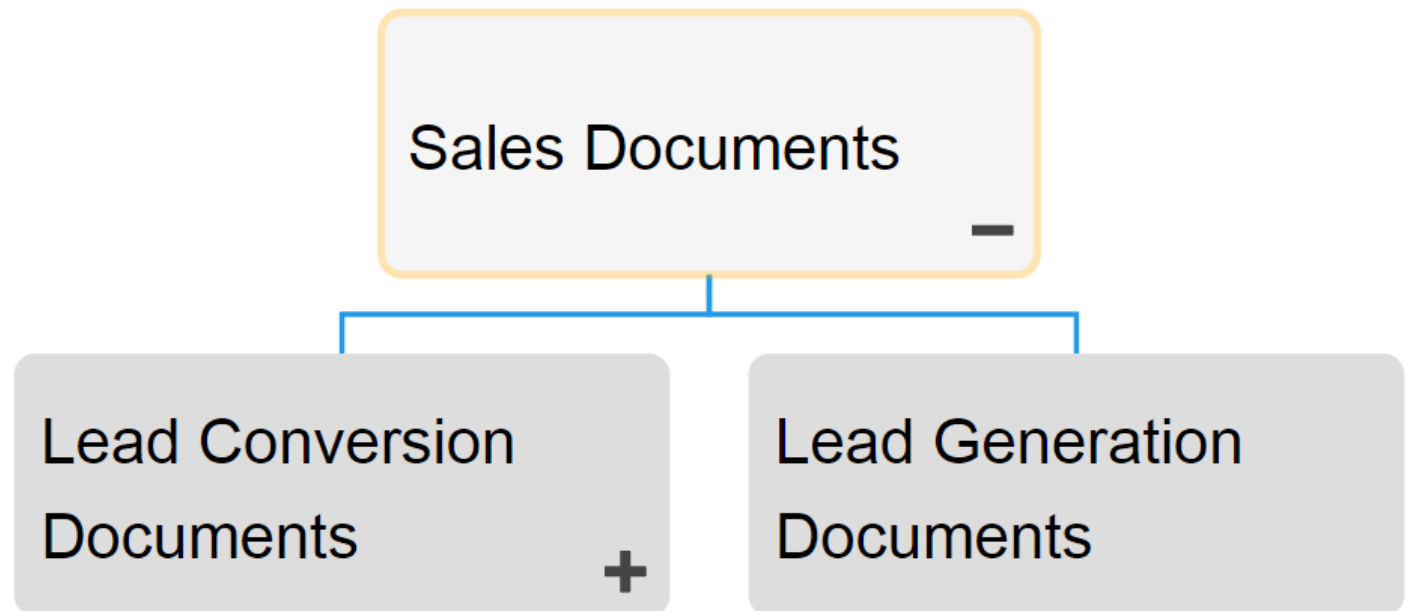
4. Please select the Hierarchy Graph icon




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.

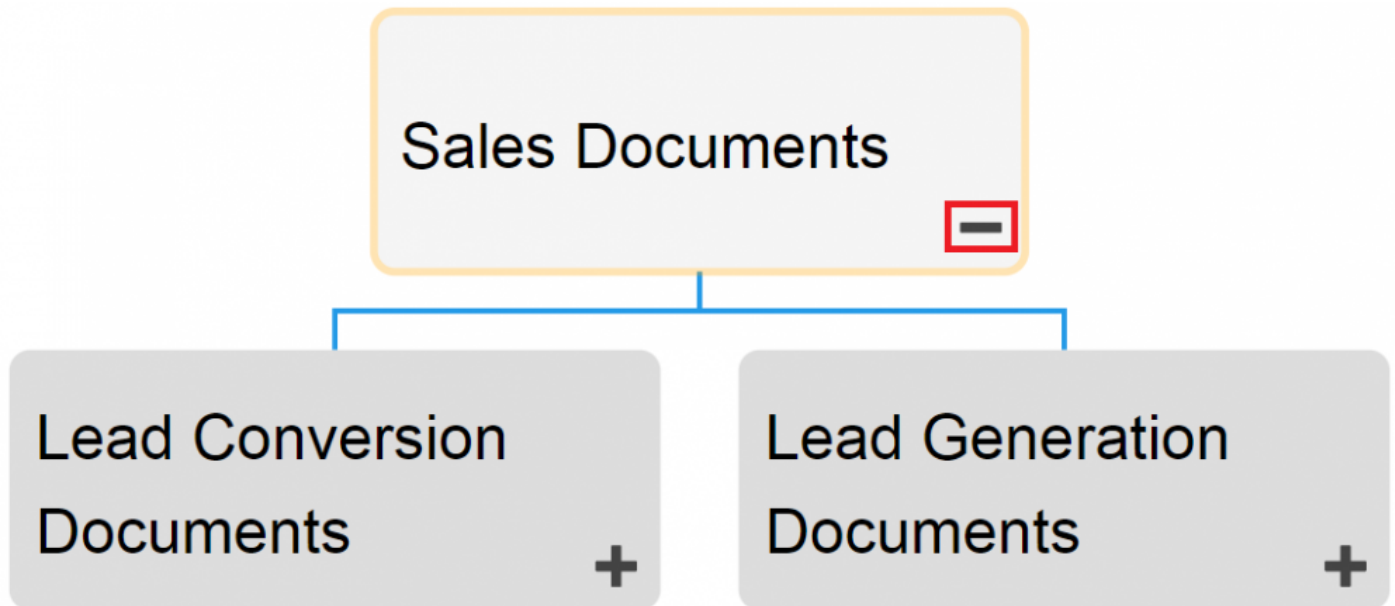


6. To further expand components of the Hierarchy Graph, double click on the  on the objects in the Graph. This will expand the item selected.



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

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



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.

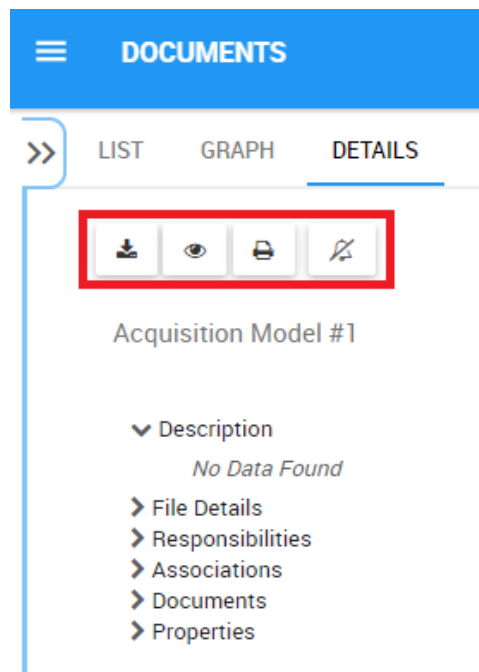
The details section is where users can see all information about items.

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](#)



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.

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.

Users can download files by selecting the download icon  on the [Document List](#).

DOCUMENTS

>>

LIST

GRAPH

DETAILS

	★ Name ▲	Role	Description	Type	My RASCI-VS	Extension	Size	Modified Date
<div><div></div><div></div><div></div></div>	☆ Beginner's Tutorial.docx	1		URL				24-Oct-2017
<div><div></div><div></div><div></div></div>	☆ Evaluation Procedure.docx	1		File	R	docx	12.33 KB	08-Sep-2017
<div><div></div><div></div><div></div></div>	☆ HR Interview Video			URL				06-Oct-2017
<div><div></div><div></div><div></div></div>	☆ HR Interview Video Demo			URL				10-Oct-2017
<div><div></div><div></div><div></div></div>	☆ Interview Questionnaire 1	1		File	R	docx	12.31 KB	28-Sep-2017
<div><div></div><div></div><div></div></div>	☆ Interview Questionnaire 2			File		docx	12.31 KB	28-Sep-2017
<div><div></div><div></div><div></div></div>	☆ Job Description Guide.docx	1		File		docx	12.29 KB	08-Sep-2017
<div><div></div><div></div><div></div></div>	☆ People Caring			Document Set				08-Sep-2017
<div><div></div><div></div><div></div></div>	☆ Recruit to hire			Document Folder				08-Sep-2017
<div><div></div><div></div><div></div></div>	☆ SOP-recruit to hire	1		SOP	A	docx	159.03 KB	06-Oct-2017
<div><div></div><div></div><div></div></div>	☆ Style Guide for Editing.docx	1		File		docx	12.32 KB	08-Sep-2017
<div><div></div><div></div><div></div></div>	☆ Unit Price			File		xlsx	17.97 KB	11-Oct-2017
<div><div></div><div></div><div></div></div>	☆ URL HR Cases	1		URL	R			29-Sep-2017

«

<

1

>

»

Show: 10 - 25 - 50

Users can also download the file by selecting the document annotation on the map graph



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.

* The default File Size cap for conversion to Preview a file is 10MB. We recommend leaving it as is to reduce delays but System Admin can edit under the [Advanced tab](#) by selecting the FILE_PREVIEW_MAX_FILE_SIZE setting

* The delay to generate preview for new files is 60,000 milliseconds (1 minute). System Admin can edit it under the [Advanced tab](#) by selecting the FILE_PREVIEW_TIMER_DEFAULT setting




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)

<ul style="list-style-type: none"> • Wbmp • 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

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:

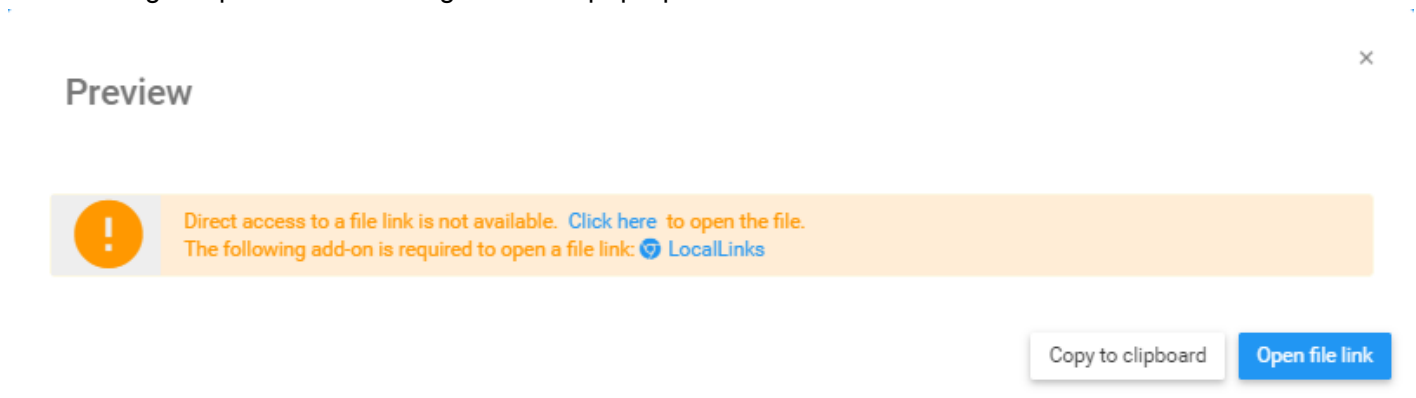
Browser	Link
	https://chrome.google.com/webstore/detail/adobe-acrobat/efaidnbmnnnibpcjpcglclefindmkaj?hl=en
	https://get.adobe.com/reader/
	https://get.adobe.com/reader/

	https://get.adobe.com/reader/
	https://get.adobe.com/reader/


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:

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/>

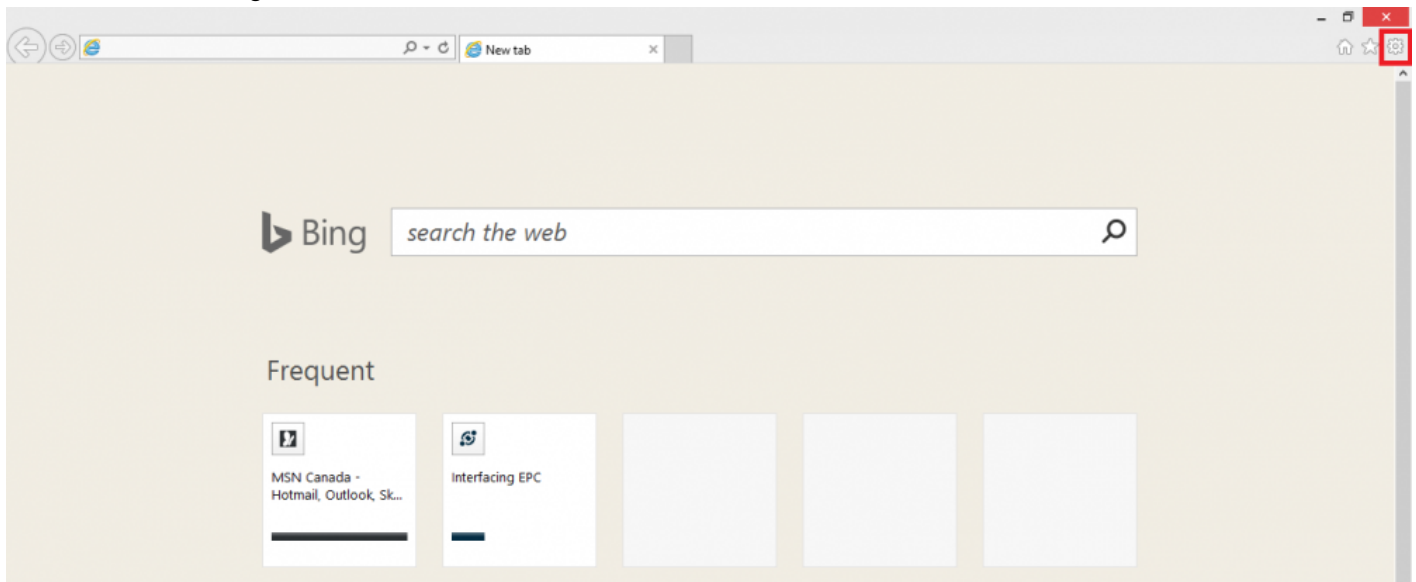
Internet Explorer

Internet Explorer users must adjust their browser settings to enable File Link previews.

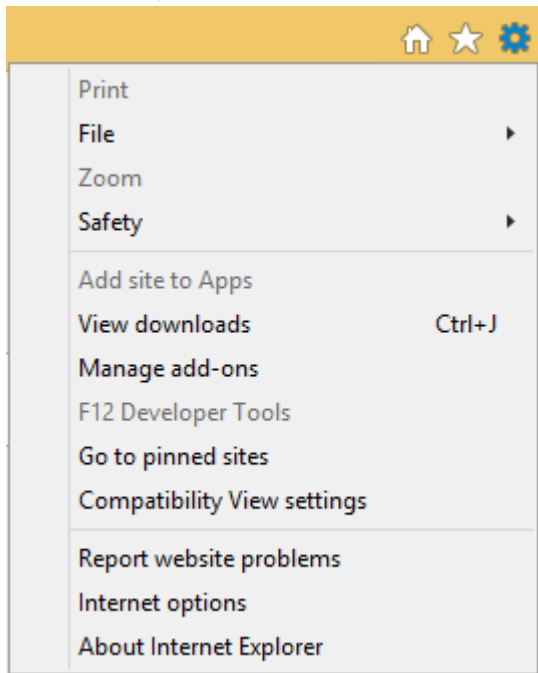
Please see the steps below:

1. Open Internet Explorer

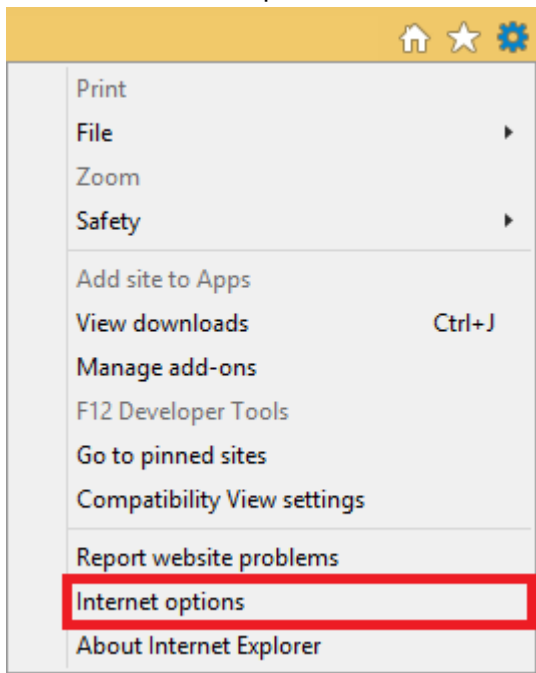
2. Select the settings icon 



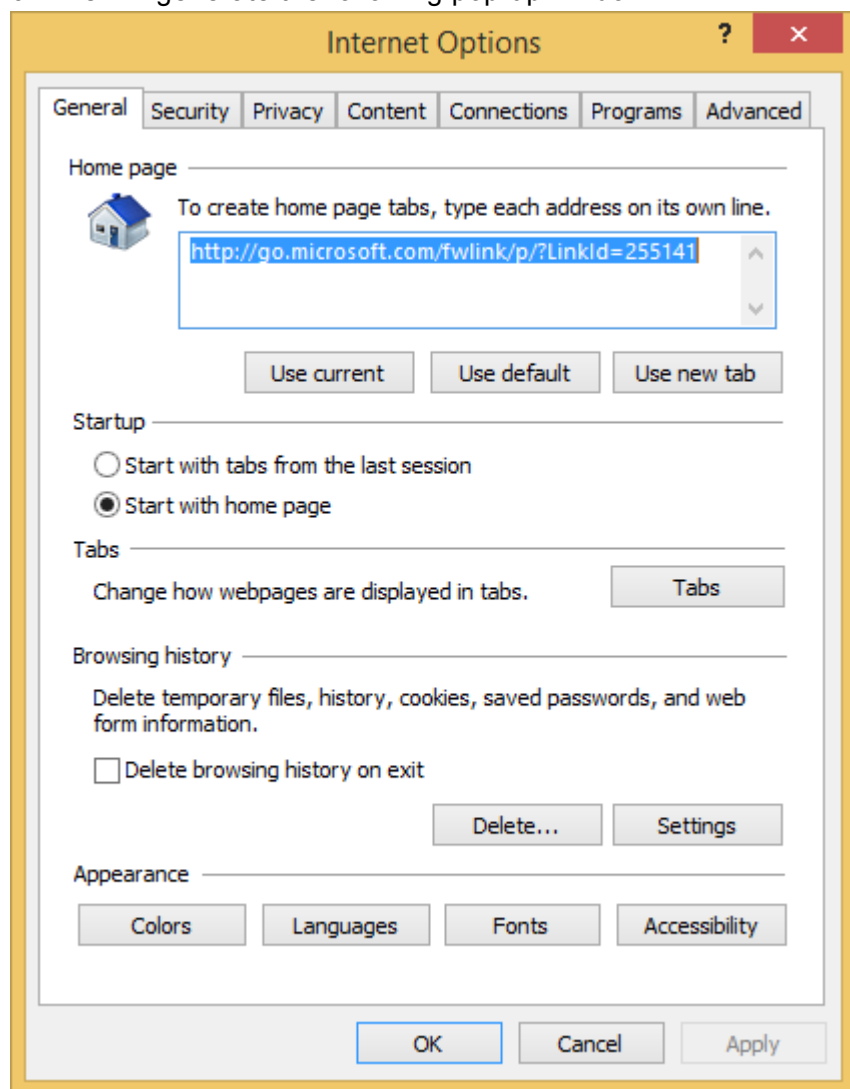
4. This will generate a drop-down menu



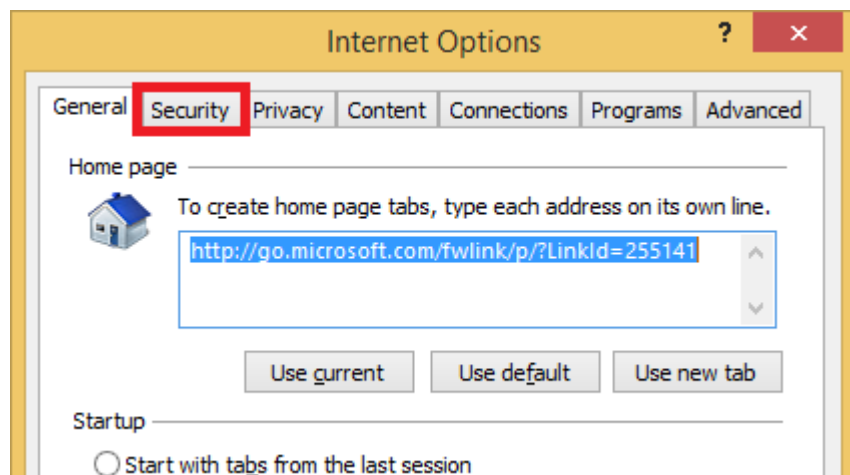
5. Select "Internet options"



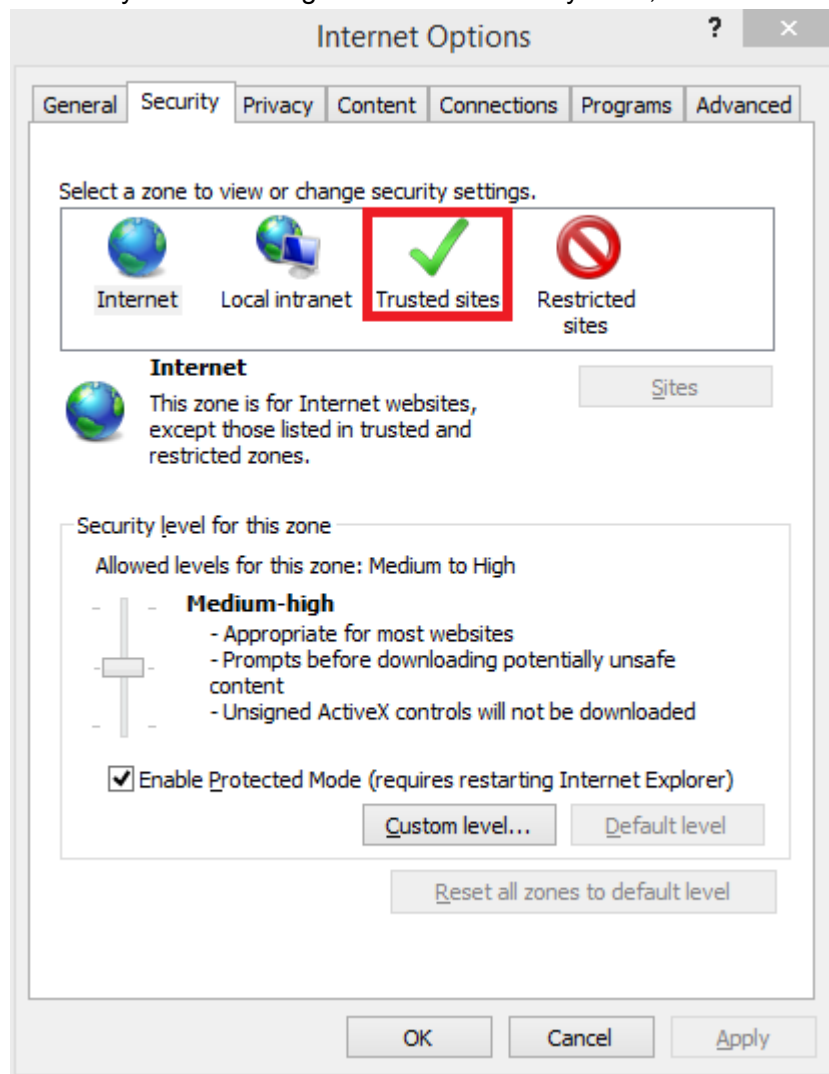
6. This will generate the following pop-up window



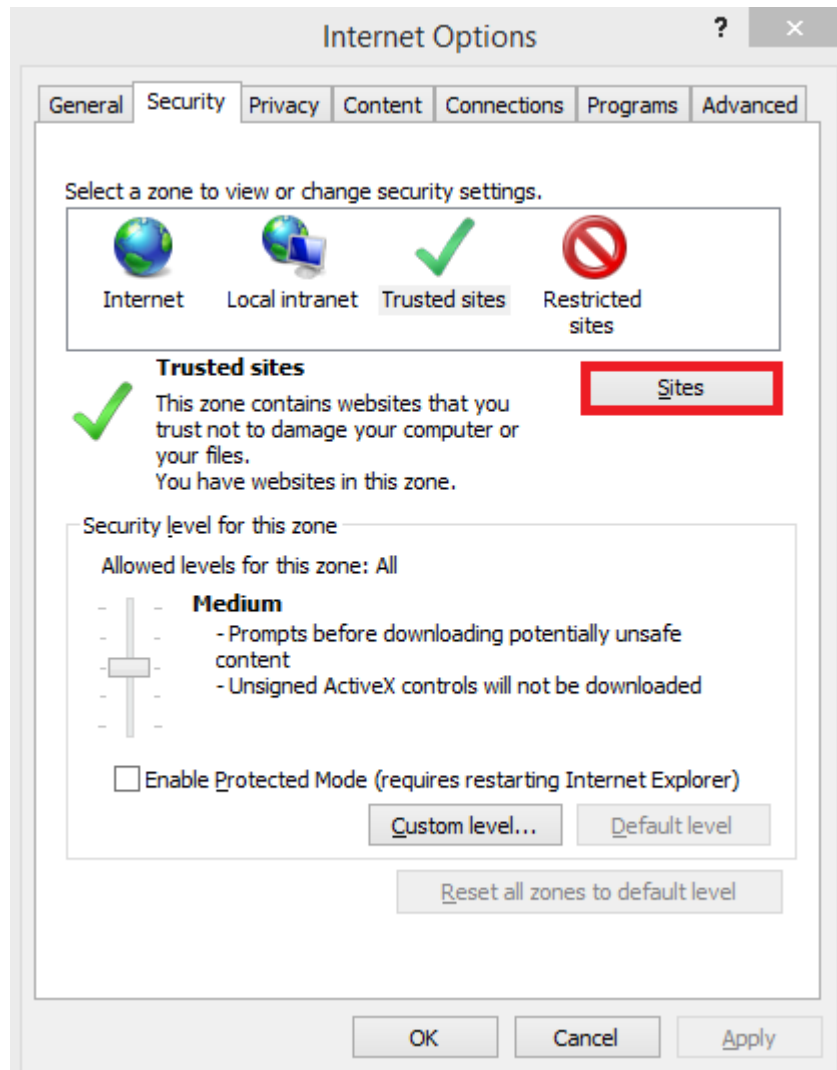
7. Select the Security tab



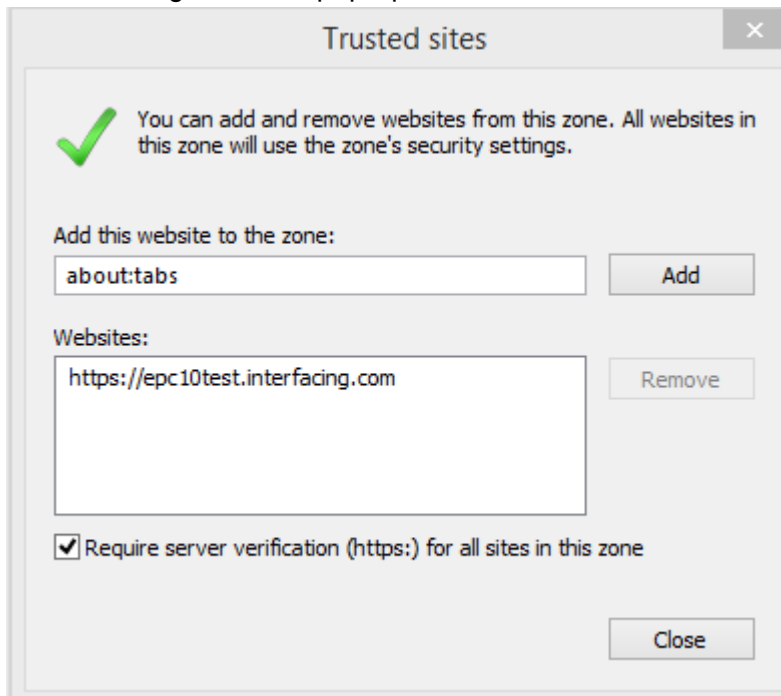
8. Once you have navigated to the “Security” Tab, select the “Trusted sites” icon



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.

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  .

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 provided 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.

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.

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:

▼ File Details

File Type:	FILE
------------	------

Size:	9.32 KB
-------	---------

4.7.4.2.3 Responsibilities

The Responsibilities section displays the 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.

▼ Responsibilities

▼ Roles

 [Account Manager \[R \]](#)

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.

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 as 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.

▼ Documents






 [Interest Questionnaire \(DOCX\)](#)  

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)

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

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

4.8 Risk

Risks of all levels can be documented, organized into library structures and communicated to stakeholders via the Web App. Users can view risks in a list form, in a graph form and in a detailed form allowing them to fully understand risks.

Mapping risks will enable users to better manage the risks that affect and influence the organization, as well as to identify, monitor, and measure them. The EPC enables users to score risks based on their likelihood and impact. The risk score can be viewed in a map as well on a customized risk matrix.

The EPC provides 3 types of graphs for users to view Risks

1. [Impact Graphs](#) (default view)
2. [Hierarchy Graphs](#)
3. [Risk Profile Graphs](#)

These views have various view-specific options that the users can define to display the Risks in a way that best suits them best. For the impact graph, the user will view the direct impacts of a risk on the organization. For the hierarchy graph, the user will view a risk in a high to low level measurement. For the Risk Profile Graphs, users will view the risk on a likelihood and impact graph, and customized risk matrix.

4.8.1 Module Overview

EPC's Risk Module allows users to view personal, role and company risks. The EPC provides 3 different dimensions, allowing users to properly view and understand their organizational structure.

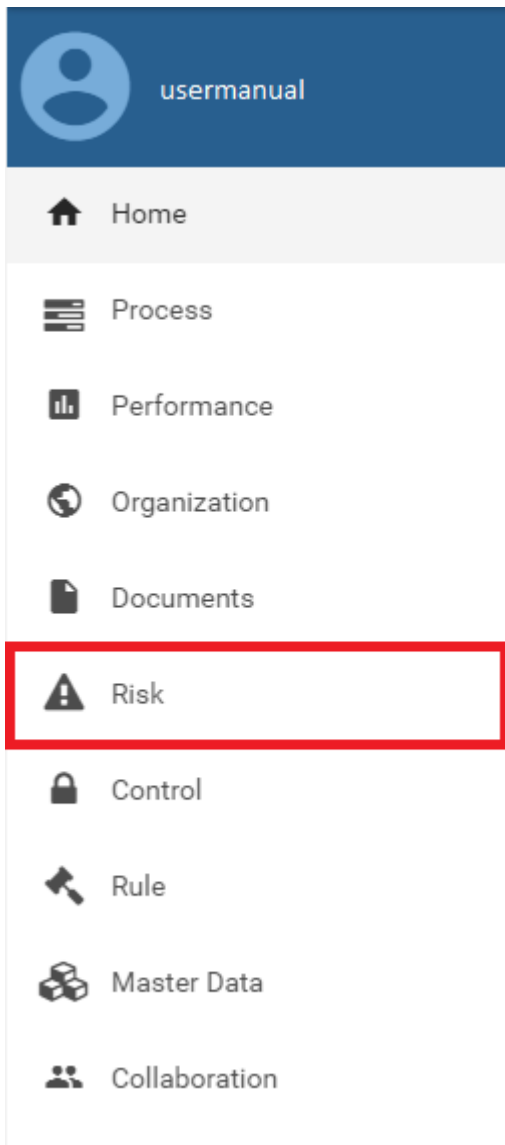
Dimension	Details
1. List	Provides view of all risk sets you have access to
2. Graph	Provides the visual representation of the risk set, their features and links (Impact and Hierarchy Graphs)
3. Details	Provides additional key information regarding specific risk details

How to access the Risk module:

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



2. Click on **Risk**



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

4.8.2 List

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

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
Impact	Allows users to sort the item in question by its impact value
Likelihood	Allows users to sort the item in question by its likelihood value
Score	Whether or not there is a score associated with the item in question
Priority	Allows users to sort the item in question by its priority value
Role	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
My RASCI-VS	The RASCI-VS associations existing on the item in question
Type	The type of the object
Modified Date	The last date that the object in question was modified
Status	View the status of the item in question when Show Latest mode is on



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

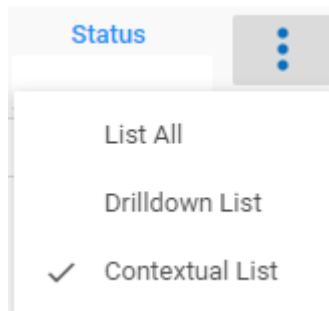
★ Name	Impact	Likelihood	Score	Priority	Role	Description	My RASCI-VS	Type	Modified Date	Status
★ Audit								Risk Set	21-Sep-2017	In Progress
★ M.I.S.								Risk Set	21-Sep-2017	Published
★ People Caring								Risk Set	12-Sep-2017	Published

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

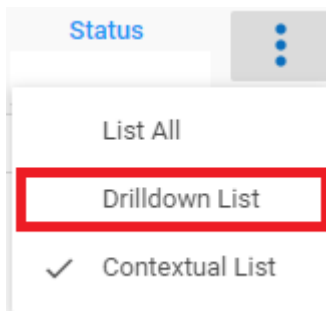


These steps are only required if a user is using an account or browser for the first time. As noted above, list preferences will be saved by user and browser to simplify navigation.

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-refresh the page

A screenshot of the 'RULE' page in a web application. The page has a blue header with the word 'RULE' and a search icon. Below the header, there are tabs for 'LIST', 'GRAPH', and 'DETAILS'. The 'LIST' tab is selected. The main content area displays a table of rules. The table has columns for 'Name', 'Role', 'Documents', 'Description', 'My RASCI-VS', 'Type', and 'Modified Date'. There are 10 rows of data, each with a star icon in the 'Name' column. The 'Modified Date' for all rows is '08-Sep-2017'.

★	Name ▲	Role	Documents	Description	My RASCI-VS	Type	Modified Date
☆	A background check must be implemented for each candidate.	1			R	Rule	08-Sep-2017
☆	A candidate must be interviewed at least twice before they can be hired.	1			R	Rule	08-Sep-2017
☆	All interviews must be conducted by at least two interviewers	1			R	Rule	08-Sep-2017
☆	IT candidates must be ITIL Foundation certified.	1			R	Rule	08-Sep-2017
☆	People Caring					Rule Set	08-Sep-2017
☆	Performance driven					Rule Folder	08-Sep-2017
☆	Recruit to Hire					Rule Folder	08-Sep-2017
☆	Rivera Enterprise					Rule Set	08-Sep-2017
☆	The manager must be present at every meeting	1			R	Rule	08-Sep-2017

4.8.2.1 Sorting

Sorting allows users to classify rules 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 Risks in List View:

Filter	Details
Favorite	Allows users to sort risks by favorites vs. non-favorites
Name	Allows users to sort risks by a key number or word within document name
Impact	Allows users to sort risks based on their impact value
Likelihood	Allows users to sort risks based on their likelihood value
Score	Allows users to sort risks by their score
Priority	Allows users to sort risks based on their priority value
Type	Allows users to sort risks based on their specific type
Modified Date	Allows users to sort risks chronologically by date last modified
Status	Allows users to sort risks based on their status

How to use “Sorting” Function

1. Navigate to the Rule 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.

RISK											
<div> <div>>></div> <div>LIST</div> <div>GRAPH</div> <div>DETAILS</div> </div>											
★	Name	Impact	Likelihood	Score	Priority	Role	Description	My RASCI-VS	Type	Modified Date	Status
☐ ☆	Audit								Risk Set	21-Sep-2017	In Progress
☐ ☆	Candidate is providing inaccurate infor...	Low	Low	40	Low	1		R	Risk	12-Sep-2017	Published
☐ ☆	M.I.S.								Risk Set	21-Sep-2017	Published
☐ ☆	People Caring								Risk Set	12-Sep-2017	Published
☐ ☆	Recruit to Hire								Risk Folder	12-Sep-2017	Published
☐ ☆	Resources will be wasted interviewing c...	Very low	Low	26	Very Loww	1		R	Risk	12-Sep-2017	Published
☐ ☆	The candidate's skills are not up to par	Medium	Medium	90	Medium	1		R	Risk	12-Sep-2017	Published

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

RISK											
<div> <div>>></div> <div>LIST</div> <div>GRAPH</div> <div>DETAILS</div> </div>											
★	Name	Impact	Likelihood	Score	Priority	Role	Description	My RASCI-VS	Type	Modified Date	Status
☐ ☆	The candidate's skills are not up to par	Medium	Medium	90	Medium	1		R	Risk	12-Sep-2017	Published
☐ ☆	Resources will be wasted interviewing c...	Very low	Low	26	Very Loww	1		R	Risk	12-Sep-2017	Published
☐ ☆	Recruit to Hire								Risk Folder	12-Sep-2017	Published
☐ ☆	People Caring								Risk Set	12-Sep-2017	Published
☐ ☆	M.I.S.								Risk Set	21-Sep-2017	Published
☐ ☆	Candidate is providing inaccurate infor...	Low	Low	40	Low	1		R	Risk	12-Sep-2017	Published
☐ ☆	Audit								Risk Set	21-Sep-2017	In Progress

4.8.2.2 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 Risk list by the following.

Component	Description
Name	Textual search for any existing name of an object
Impact	Customized risk priorities
Likelihood	Customized risk priorities
Score	Empty – The object has no score Not Empty – The object has a score
Priority	Customized risk priorities
Role	Empty – The object has no role Not Empty – The object has a role
Description	Empty – The object has no description Not Empty – The object has a description
My RASCI-VS	Responsible Accountable Support Consulted Informed Verifier Signatory
Type	Risk Set Risk Folder Risk
Modified Date	The specific dates that things have been modified by
Status	In Progress Published Sent for a review Approved Rejected

The Filtering section will cover the following:

1. [How to Add Filters](#)

2. [How to Remove Filters](#)
3. [How to Combine Filters](#)

4.8.2.2.1 Add Filter

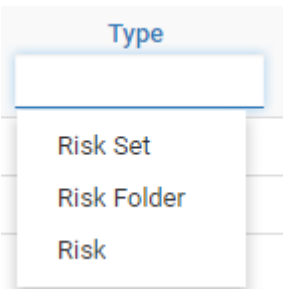
You can add filters to see Risks and other items of your choice. **Type** what you are looking for, **select** the filter in the drop-down menu, or **define the range of dates**.

How to Add Filter

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

RISK											
>> LIST GRAPH DETAILS											
★	Name ▲	Impact	Likelihood	Score	Priority	Role	Description	My RASCI-VS	Type	Modified Date	Status
🔍 ☆	Audit								Risk Set	21-Sep-2017	In Progress
🔍 ☆	Candidate is providing inaccurate inform...	Low	Low	40	Low	1		R	Risk	12-Sep-2017	Published
🔍 ☆	M.I.S.								Risk Set	21-Sep-2017	Published
🔍 ☆	People Caring								Risk Set	12-Sep-2017	Published
🔍 ☆	Recruit to Hire								Risk Folder	12-Sep-2017	Published
🔍 ☆	Resources will be wasted interviewing ca...	Very low	Low	20	Very Low	1		R	Risk	12-Sep-2017	Published
🔍 ☆	The candidate's skills are not up to par	Medium	Medium	90	Medium	1		R	Risk	12-Sep-2017	Published

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



3. Select the desired filter. For this example, we will select **Risk** and **Risk Set**.

≡

RISK

🔍🔔⋮

>> LIST GRAPH DETAILS

★	Name ▲	Impact	Likelihood	Score	Priority	Role	Description	My RASCI-VS	Type	Modified Date	Status	⋮
									Risk Set x Risk x			
🗨 ☆	Audit								Risk Set	21-Sep-2017	In Progress	
🗨 ☆	Candidate is providing inaccurate inform...	Low	Low	40	Low	1		R	Risk	12-Sep-2017	Published	
🗨 ☆	M.I.S.								Risk Set	21-Sep-2017	Published	
🗨 ☆	People Caring								Risk Set	12-Sep-2017	Published	
🗨 ☆	Resources will be wasted interviewing ca...	Very low	Low	20	Very Low	1		R	Risk	12-Sep-2017	Published	
🗨 ☆	The candidate's skills are not up to par	Medium	Medium	90	Medium	1		R	Risk	12-Sep-2017	Published	

4.8.2.2.2 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.

RISK											
>> LIST GRAPH DETAILS											
★	Name ▲	Impact	Likelihood	Score	Priority	Role	Description	My RASCI-VS	Type	Modified Date	Status
									Risk Set x		
									Risk		
🔍 ☆	Audit								Risk Set	21-Sep-2017	In Progress
🔍 ☆	Candidate is providing inaccurate inform...	Low	Low	40	Low	1		R	Risk	12-Sep-2017	Published
🔍 ☆	M.I.S.								Risk Set	21-Sep-2017	Published
🔍 ☆	People Caring								Risk Set	12-Sep-2017	Published
🔍 ☆	Resources will be wasted interviewing ca...	Very low	Low	20	Very Low	1		R	Risk	12-Sep-2017	Published
🔍 ☆	The candidate's skills are not up to par	Medium	Medium	90	Medium	1		R	Risk	12-Sep-2017	Published


4.8.2.2.3 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](#).

4.8.2.3 Quick Graph View

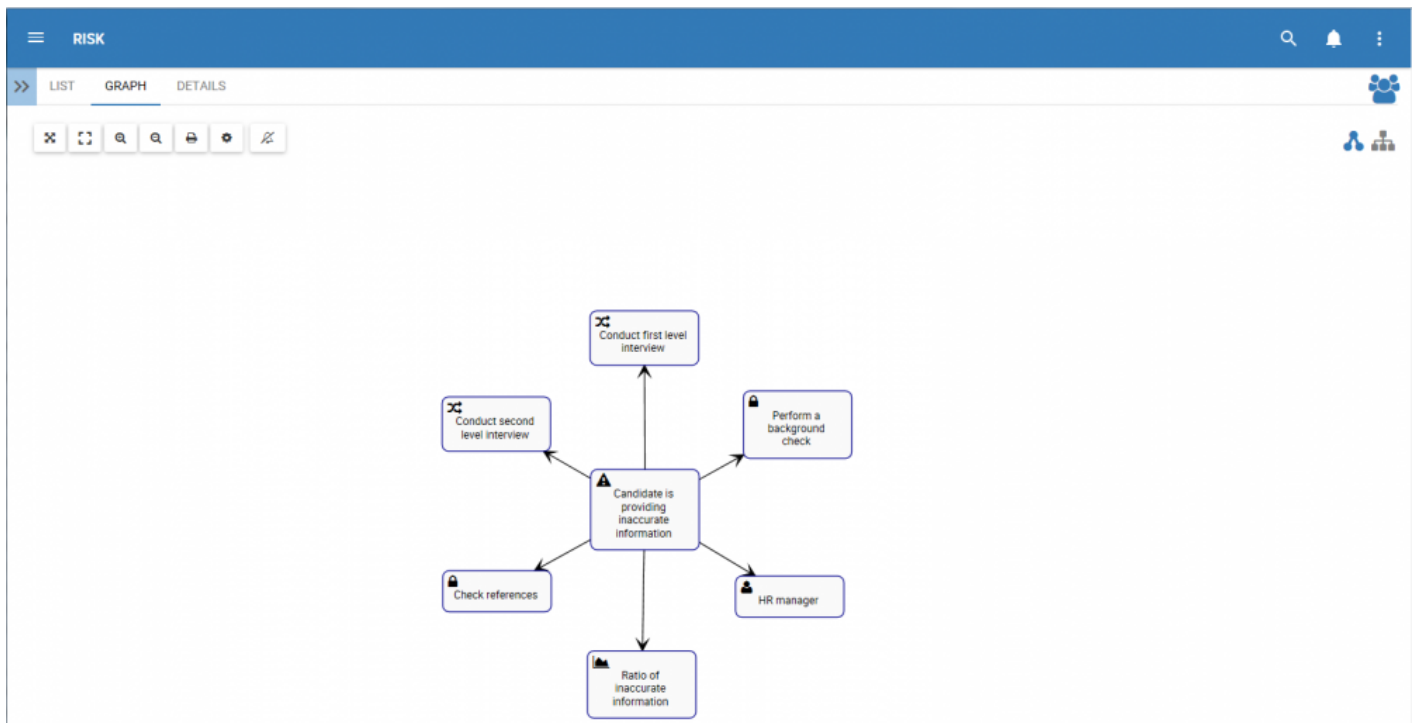
Quick Graph View is a feature of the EPC Web App that allows users to immediately view rules in a graph mode. While Graph's will be further explained below, the Quick Graph View allows users to quickly navigate to a Graph from "List View".

Please see the instructions below:

1. Navigate to Rule 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.

RISK											
>> LIST GRAPH DETAILS											
★	Name ▲	Impact	Likelihood	Score	Priority	Role	Description	My RASCI-VS	Type	Modified Date	Status
	☆ Audit								Risk Set	21-Sep-2017	In Progress
	☆ Candidate is providing inaccurate informat...	Low	Low	40	Low	1		R	Risk	12-Sep-2017	Published
	☆ M.I.S.								Risk Set	21-Sep-2017	Published
	☆ People Caring								Risk Set	12-Sep-2017	Published
	☆ Recruit to Hire								Risk Folder	12-Sep-2017	Published
	☆ Resources will be wasted interviewing can...	Very low	Low	20	Very Low	1		R	Risk	12-Sep-2017	Published
	☆ The candidate's skills are not up to par	Medium	Medium	90	Medium	1		R	Risk	12-Sep-2017	Published

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.

4.8.3 Graph

Graphs are used as a visual representation of Risks. Graphs allow organizations and users to map out their Risks and provide key stakeholders with necessary information. They provide users with a high-level overview of Risks, as well as the processes and roles affected by these Risks

The following will be covered in the Graph section:

1. [Graph Navigation](#)
2. Graph Types ([Impact](#), [Hierarchy](#), [Risk Profile](#))

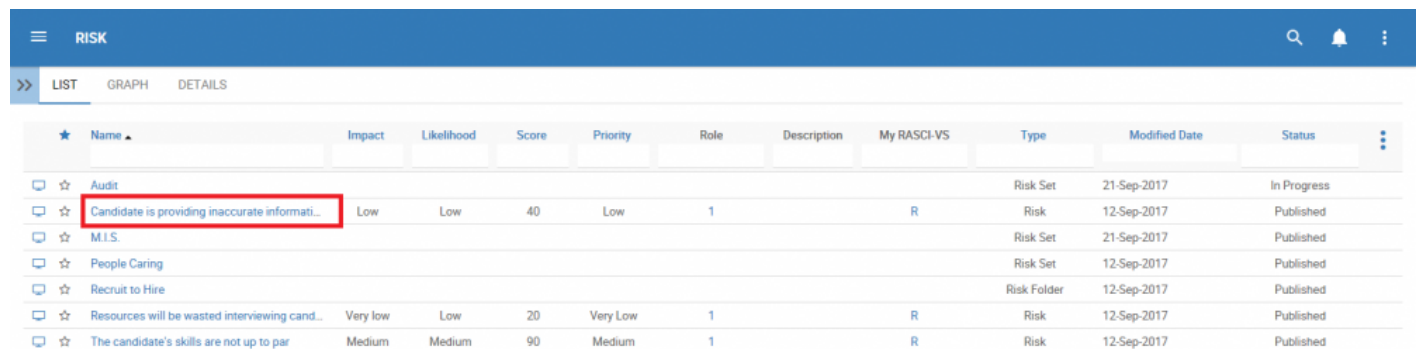
4.8.3.1 Graph Navigation

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.

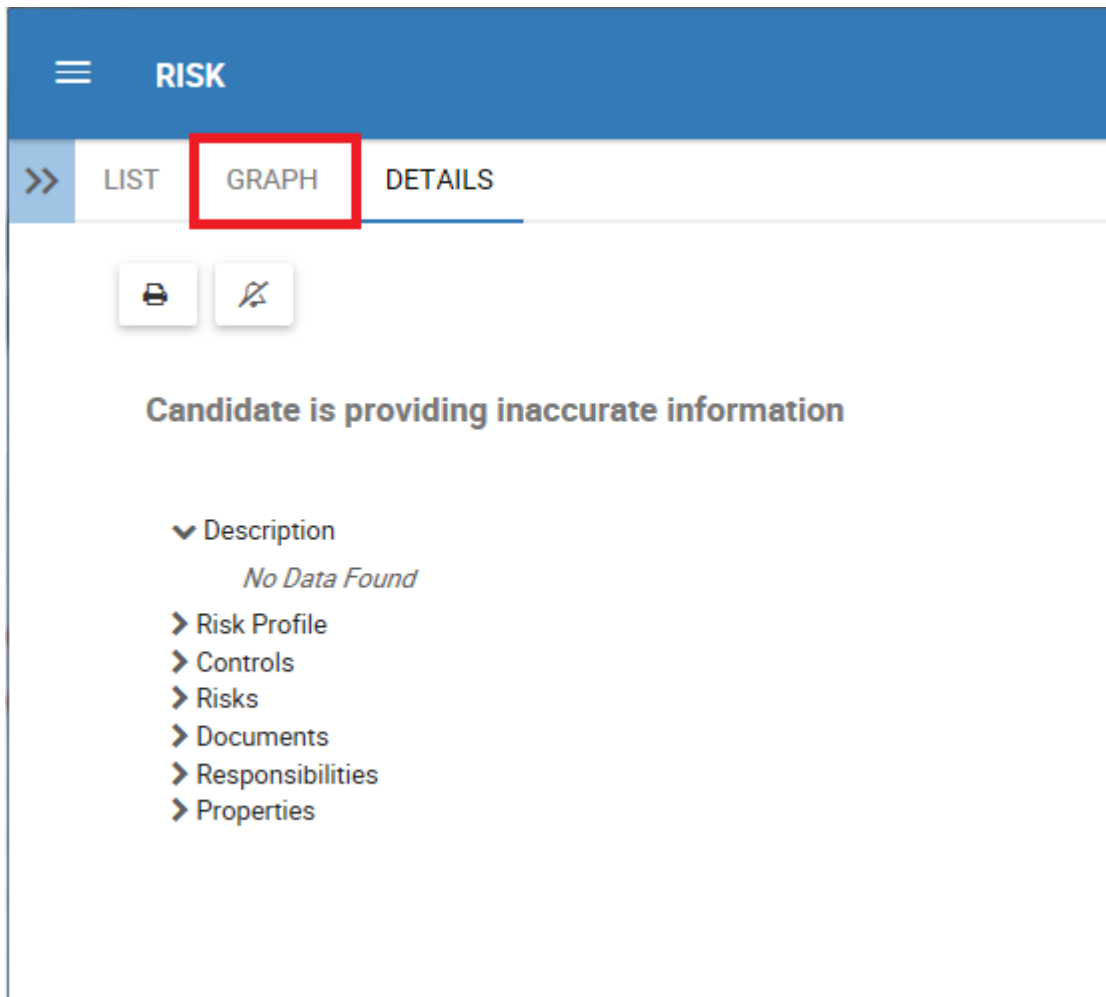
How to navigate to the Graph section (Manual Navigation)

1. Click on the **Navigation Menu Button** on the top left of your screen.
2. Click on **Risk**
3. By default, you will be directed to **List View** in the Risk module.
4. Select any item on the list by clicking on the desired line of the item

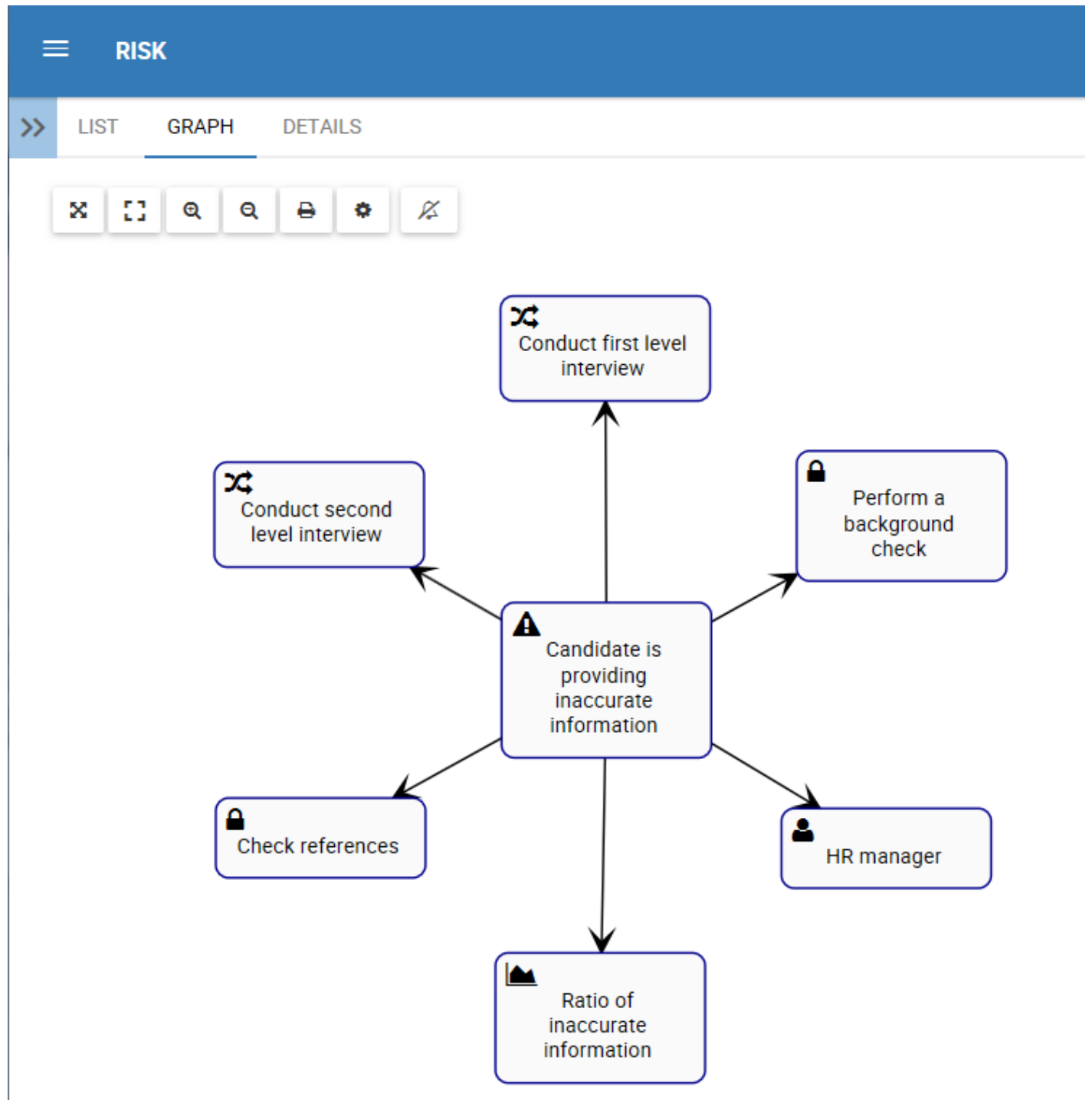


RISK											
>> LIST GRAPH DETAILS											
★	Name ▲	Impact	Likelihood	Score	Priority	Role	Description	My RASCI-VS	Type	Modified Date	Status
☐ ☆	Audit								Risk Set	21-Sep-2017	In Progress
☐ ☆	Candidate is providing inaccurate informati...	Low	Low	40	Low	1		R	Risk	12-Sep-2017	Published
☐ ☆	M.I.S.								Risk Set	21-Sep-2017	Published
☐ ☆	People Caring								Risk Set	12-Sep-2017	Published
☐ ☆	Recruit to Hire								Risk Folder	12-Sep-2017	Published
☐ ☆	Resources will be wasted interviewing cand...	Very low	Low	20	Very Low	1		R	Risk	12-Sep-2017	Published
☐ ☆	The candidate's skills are not up to par	Medium	Medium	90	Medium	1		R	Risk	12-Sep-2017	Published

5. You will be prompted to the item's details page
6. Select the “Graph” tab on the upper left corner of the page

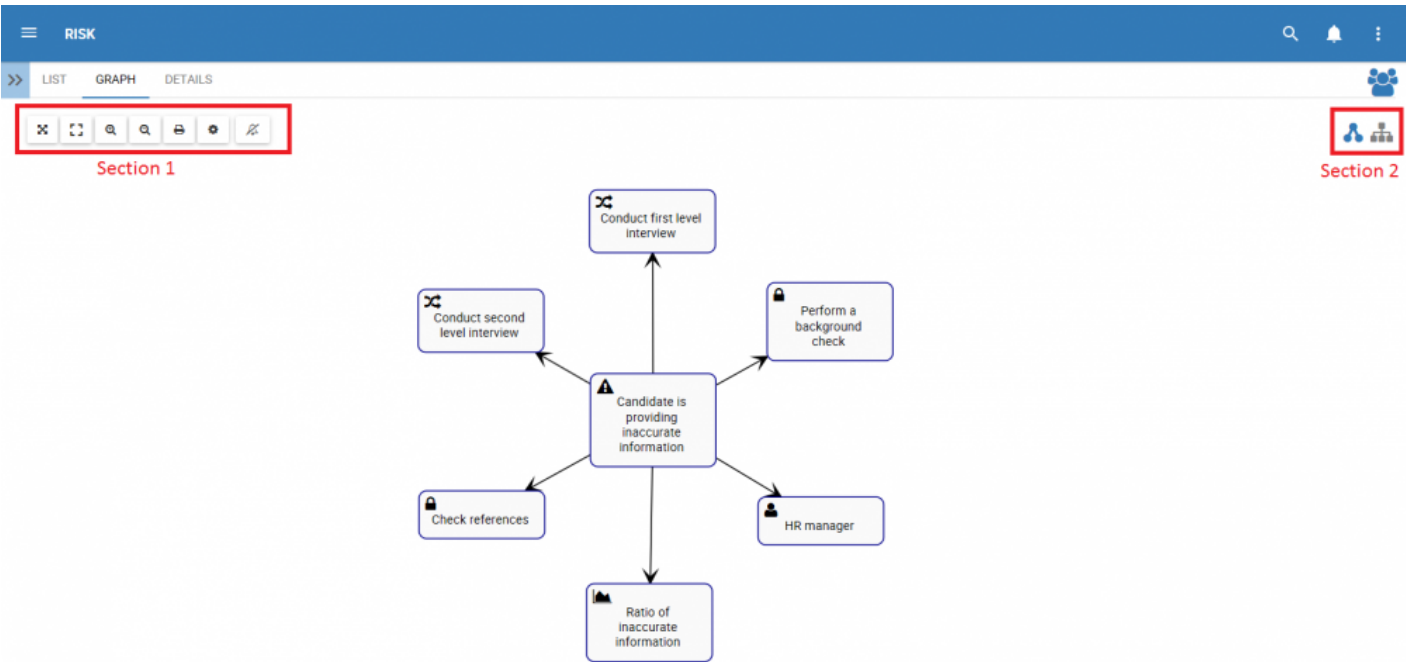


7. You will be navigated to the Graph section. By default, users will be sent to Impact view as the default Graph view. An example of this view can be seen below.






4.8.3.1.1 Navigation 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 Risk 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

Options		This button will allow a user to modify the settings associated with their Graphs
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.

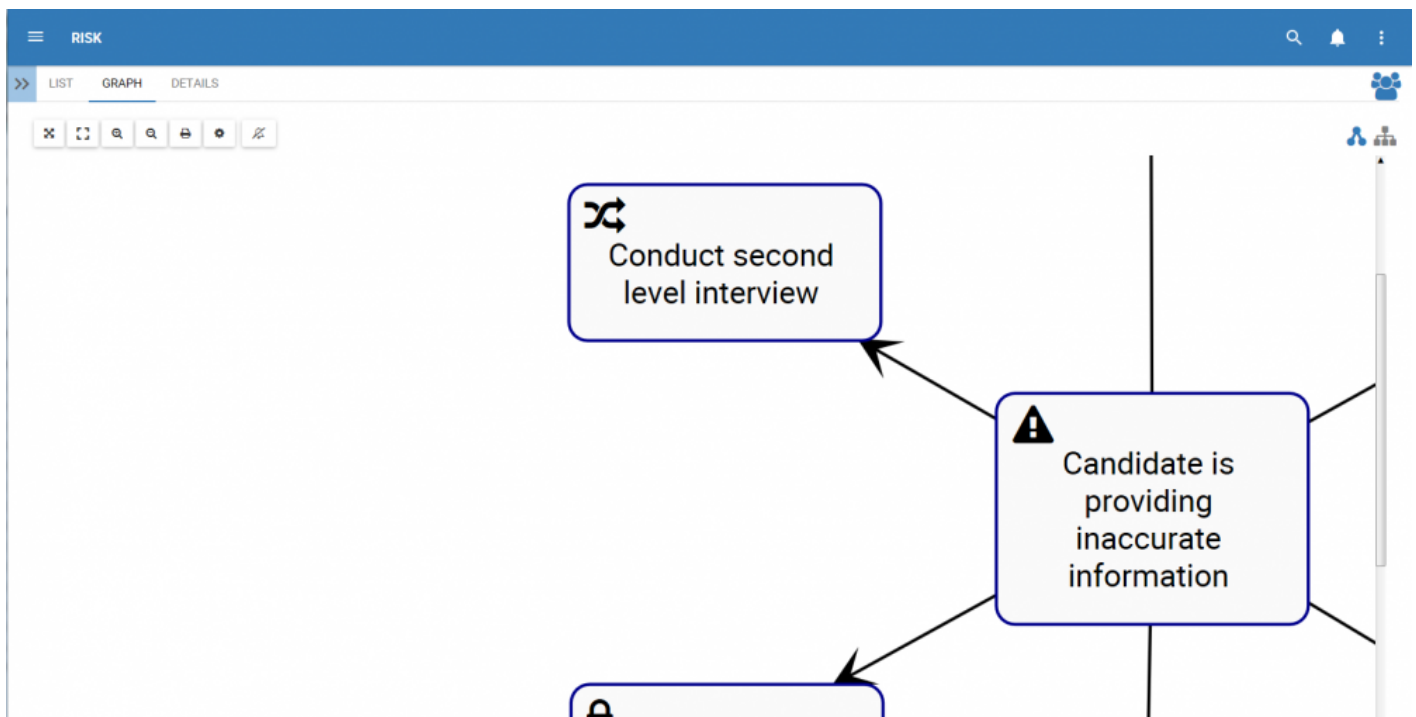
Item	Icon	Description
Impact Graph		Graph showing downstream representation of associated items
Hierarchy Graph		Graph showing a top-down view of items and how they fit within organizations


4.8.3.1.1.1 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 Risk within the Risk Module
2. Click on the [Quick Graph View](#) icon 
3. Alter the Graph (Zoom in, out or shift). Please see [zoom in](#) instructions below for further details.



4. Click on button  and the page will be reset

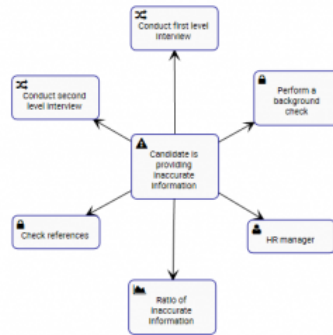
Interfacing Technologies Corporation EPC10 - WebApp Manual - 10.1

RISK

LIST GRAPH DETAILS

Close, Full Screen, Search, Zoom In, Zoom Out, Settings, Link



Users

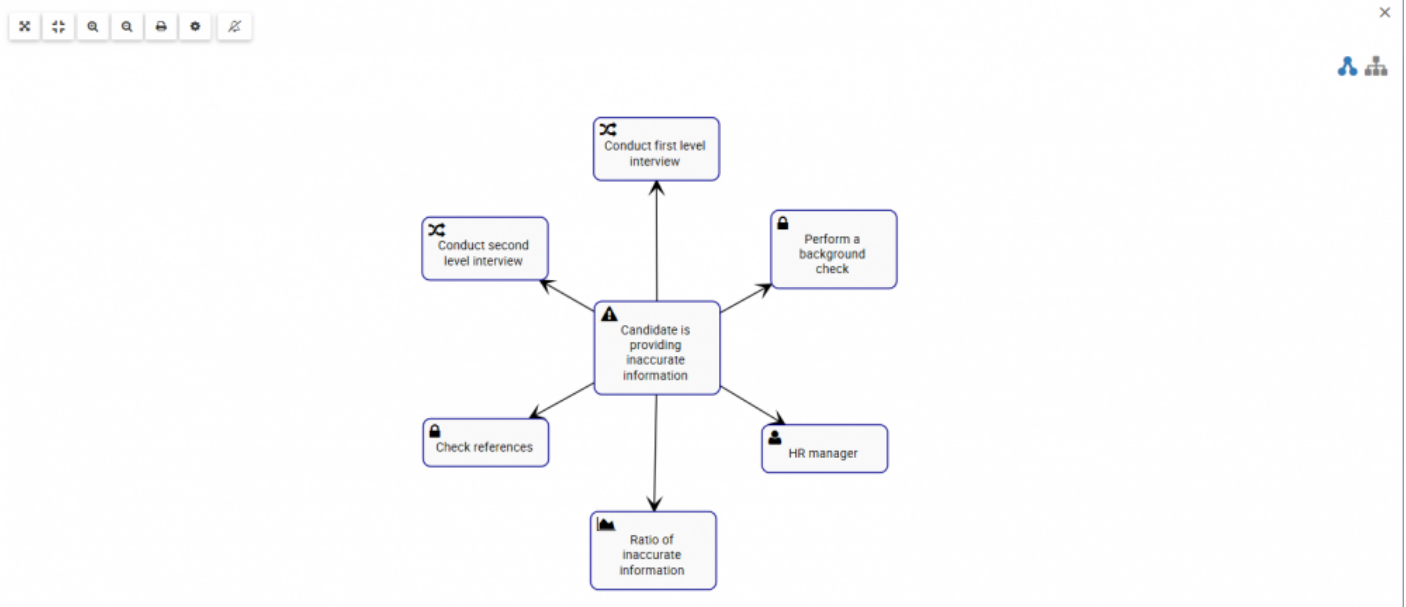




4.8.3.1.1.2 Full Screen

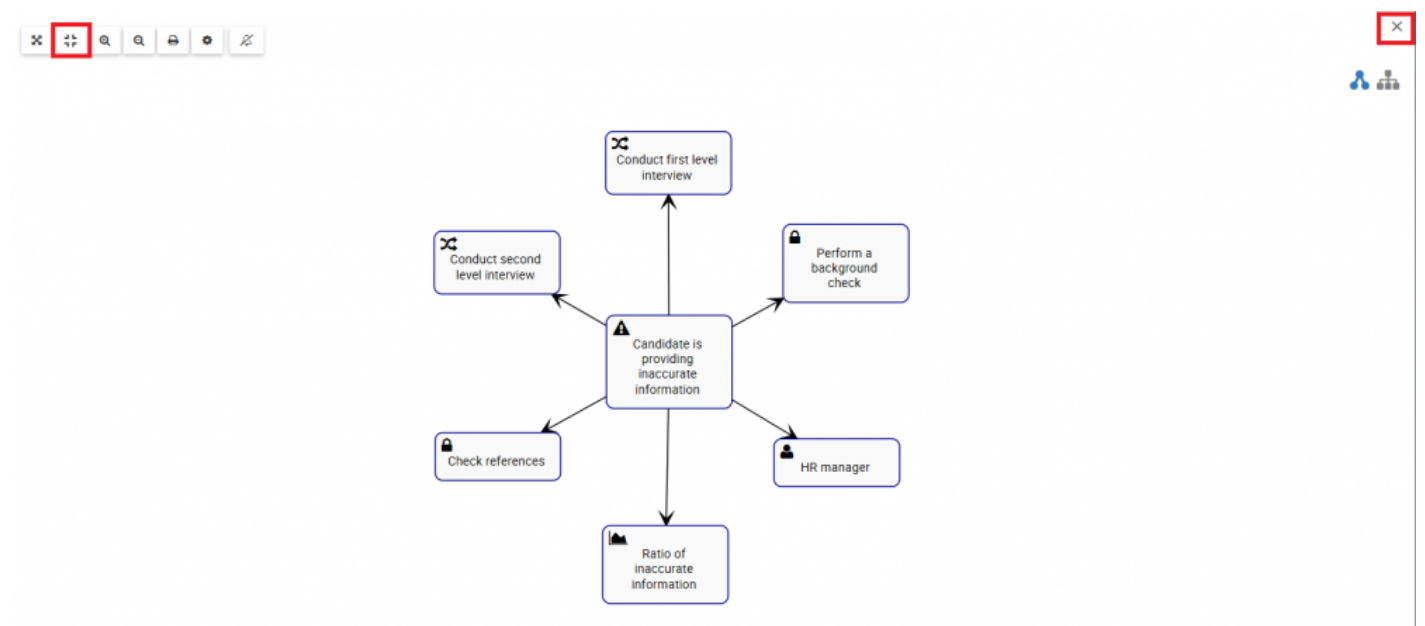
The fit screen function has been implemented to assist users at viewing Risks, utilizing the full screen of a user.

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

1. Navigate to a Risk Set within the Risk 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  or  on the upper right corner



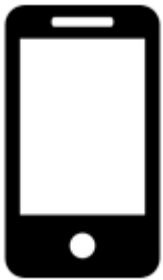
4.8.3.1.1.3 Zoom in

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

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

1. Navigate to a Risk Unit within the Risk 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.

4.8.3.1.1.4 Zoom Out

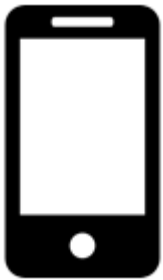
The zoom function has been implemented to assist users in viewing specific items within selected Risk items.

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

1. Navigate to a Risk Unit within the Risk 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

4.8.3.1.1.5 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 a Risk Unit within the Risk 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

Print Settings

General

A

Print Mode:

Single Page

B

Page Layout:

Landscape

C

Page Size:

Letter

Multi page print only

D

Graph Layout:

Left to Right

Close

Print

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 b. Legal	8.5 × 11.0 in (216 × 279 mm) 8.5 × 14.0 in (216 × 356 mm)

	c. A3 d. A4	11.7 × 16.54 in (297 × 420 mm) 8.3 × 11.7 in (210 × 297 mm)
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

Print Settings ×

General

Print Mode:

Single Page

Page Layout:

Landscape

Page Size:

Letter

Multi page print only

Graph Layout:

Left to Right

Close

Print

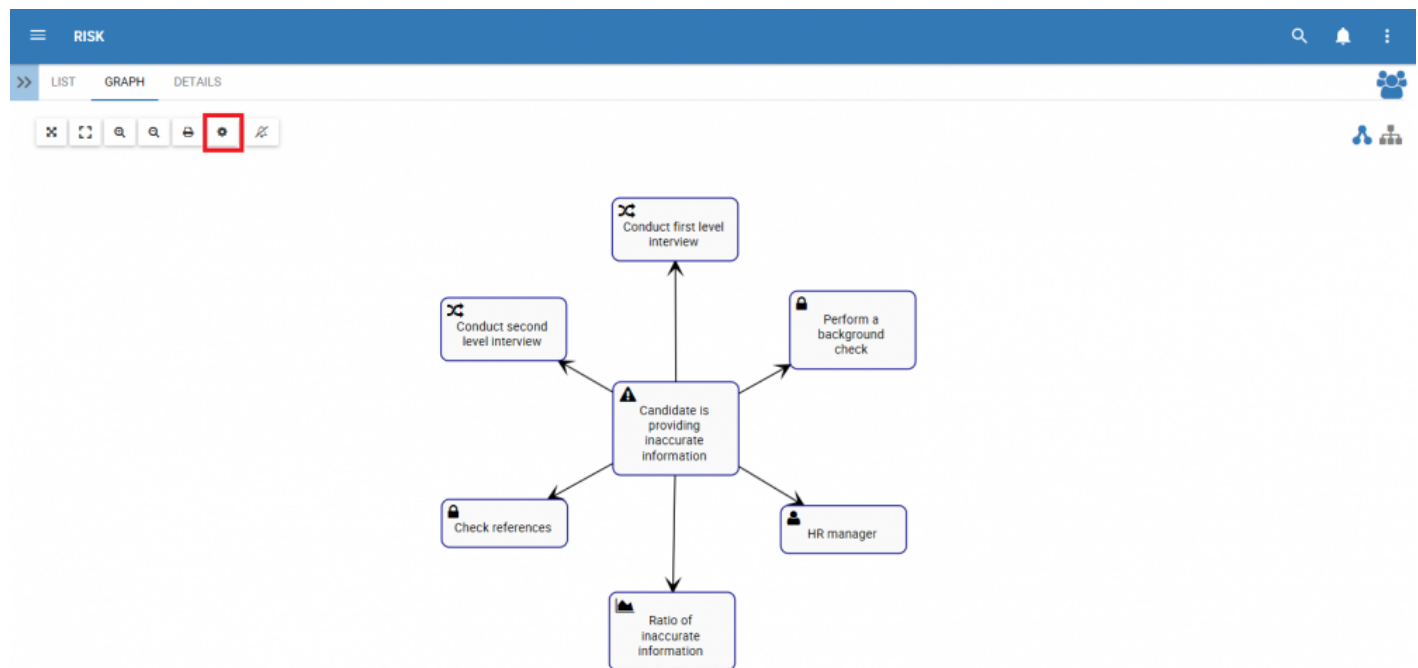
4.8.3.1.1.6 Options

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.

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




Map options ×

General —

Filter: ASSET, ATTRIBUTE, (▼

Reset to Default Close Save changes

To customize the graph and use the Filter option, please see the steps below:

1. Select “Options” icon 
2. Navigate cursor to “Asset, Attribute”



Map options ×

General —

Filter: ASSET, ATTRIBUTE, (▼

Reset to Default Close Save changes

3. The following drop-down menu will be generated

Map options

General

Filter: ASSET, ATTRIBUTE, (▼)

Select All Deselect All

Reset to Default

Close Save changes

ASSET ✓
ATTRIBUTE ✓
CONTROL ✓
DOCUMENT ✓
END ✓
ENTITY ✓
GATEWAY ✓
INTERMEDIATE ✓
KCI ✓
KPI ✓
KRI ✓
MATERIAL ✓
OBJECTIVE ✓
ORG UNIT ✓
PROCESS ✓
RESOURCE ✓
RISK ✓
ROLE ✓

Conduct first level Interview
Conduct second level Interview
30% diversity in the workforce
Perform a background check
HR Manager
Ratio of Inaccurate Information
Check references
Candidate Is providing Inaccurate Information

4. Select the desired filter and select “Save Changes”. For this example, we will select **Control** and **KRI**.

Map options ×

General

Filter: CONTROL, KRI

Reset to Default

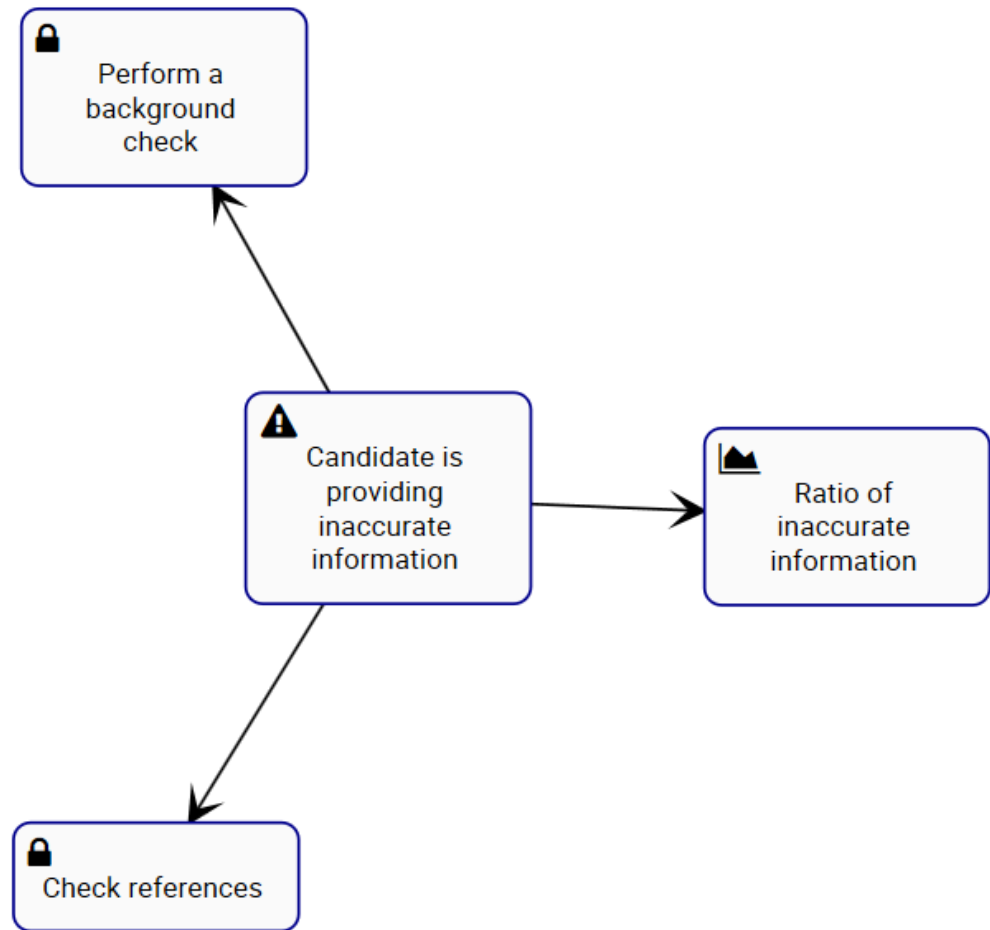
Select All Deselect All

- ASSET
- ATTRIBUTE
- CONTROL ✓
- DOCUMENT
- END
- ENTITY
- GATEWAY
- INTERMEDIATE
- KCI
- KPI
- KRI ✓
- MATERIAL
- OBJECTIVE
- ORG UNIT
- PROCESS
- RESOURCE
- RISK


Close Save changes

```
graph TD; A[Candidate Is providing Inaccurate Information] --> B[Conduct first level interview]; A --> C[Conduct second level interview]; A --> D[30% diversity in the workforce]; A --> E[Perform a background check]; A --> F[HR Manager]; A --> G[Ratio of Inaccurate Information]; A --> H[Check references];
```

5. The following graph will be generating showing only the **Controls** and **KRIs** that are related to the specific **Risk**






4.8.3.1.1.7 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.

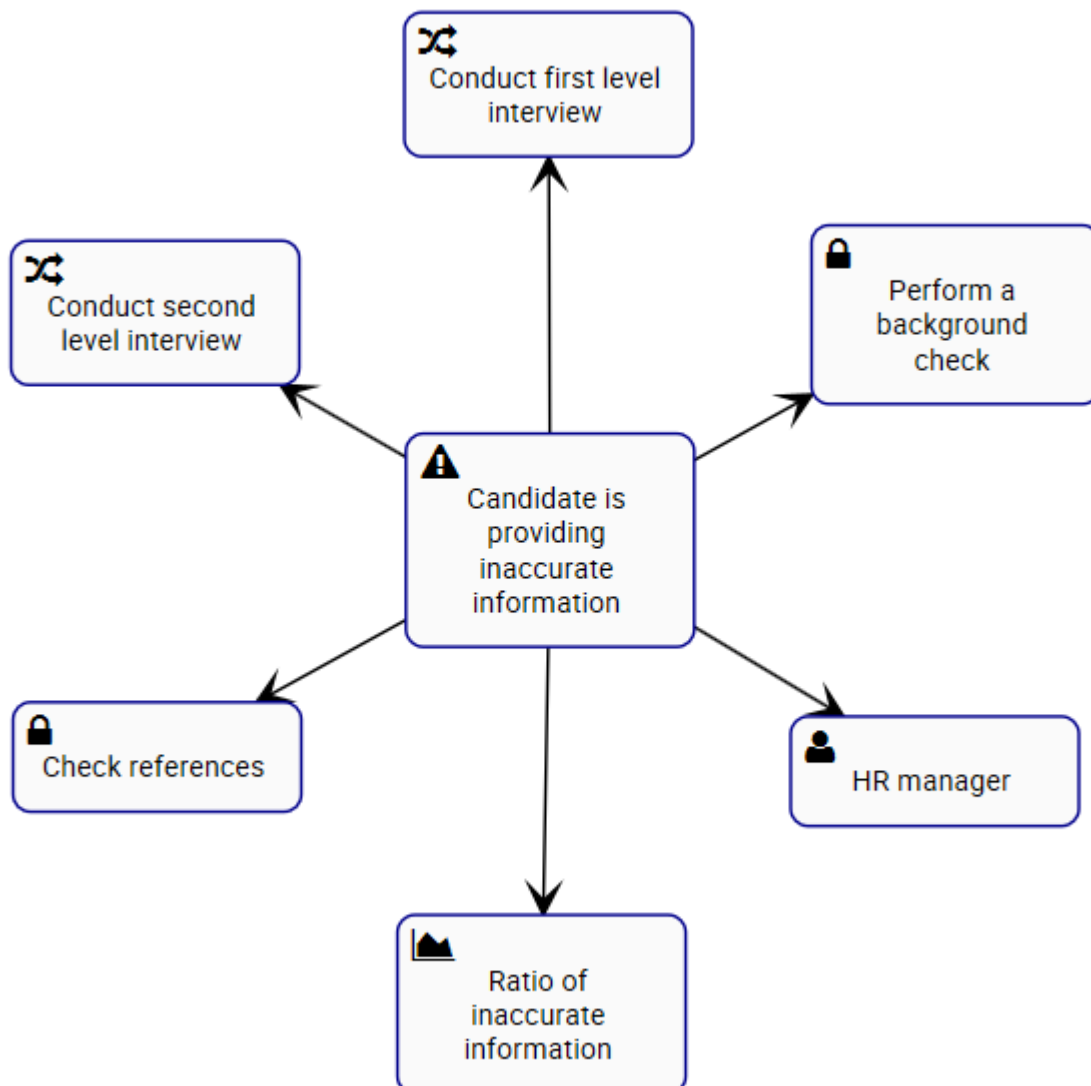
To use the Subscribe button, please see the following instructions.

1. Navigate to an Risk Unit within the Risk 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.

4.8.3.2 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



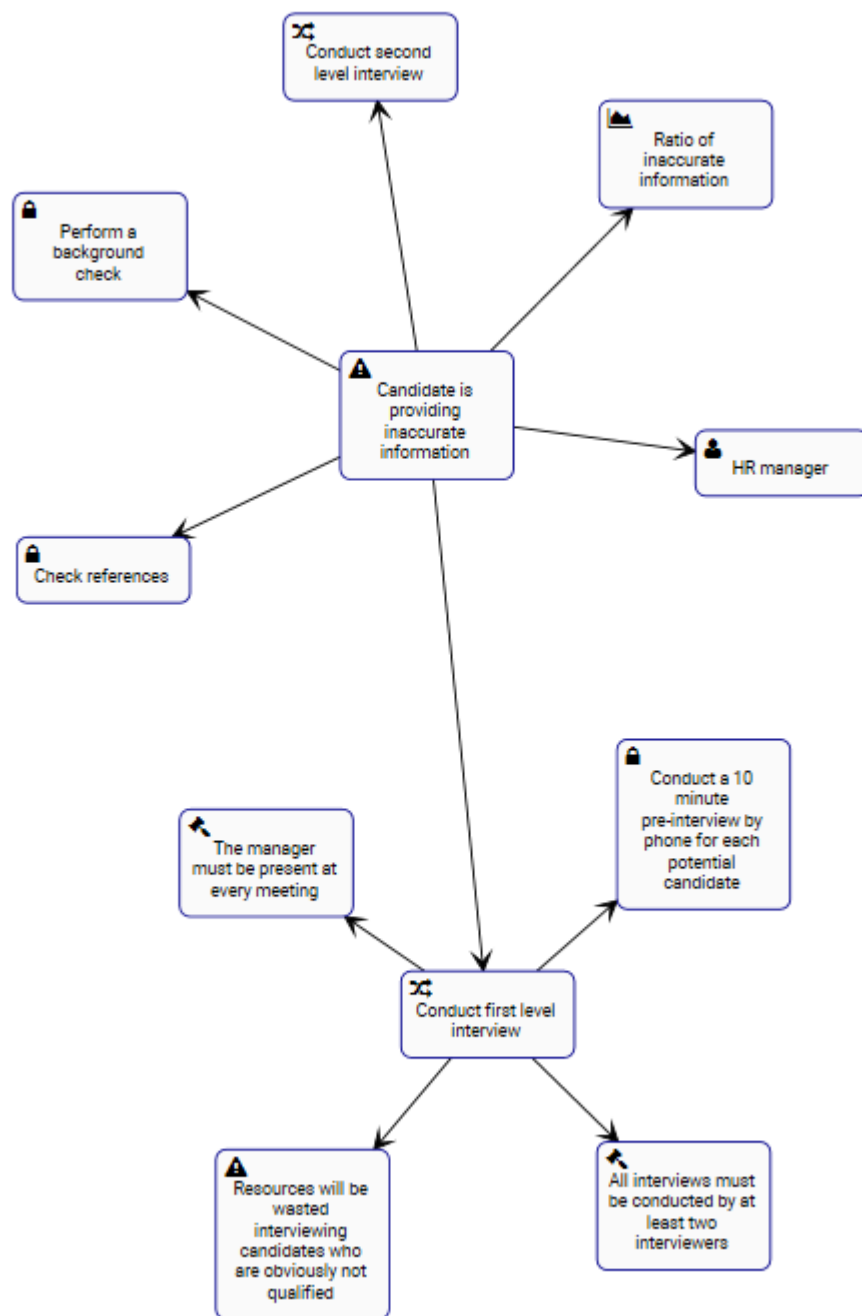
The example features the Impact Graph of the Risk "Candidate is providing inaccurate information." The Risk itself is associated to a Role "HR Manager", to two Controls "Perform a background check" and "Check

references,” to a Key Risk Indicator “Ratio of inaccurate information” and to two tasks “Conduct first level interview” and “Conduct second level interview.”

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.

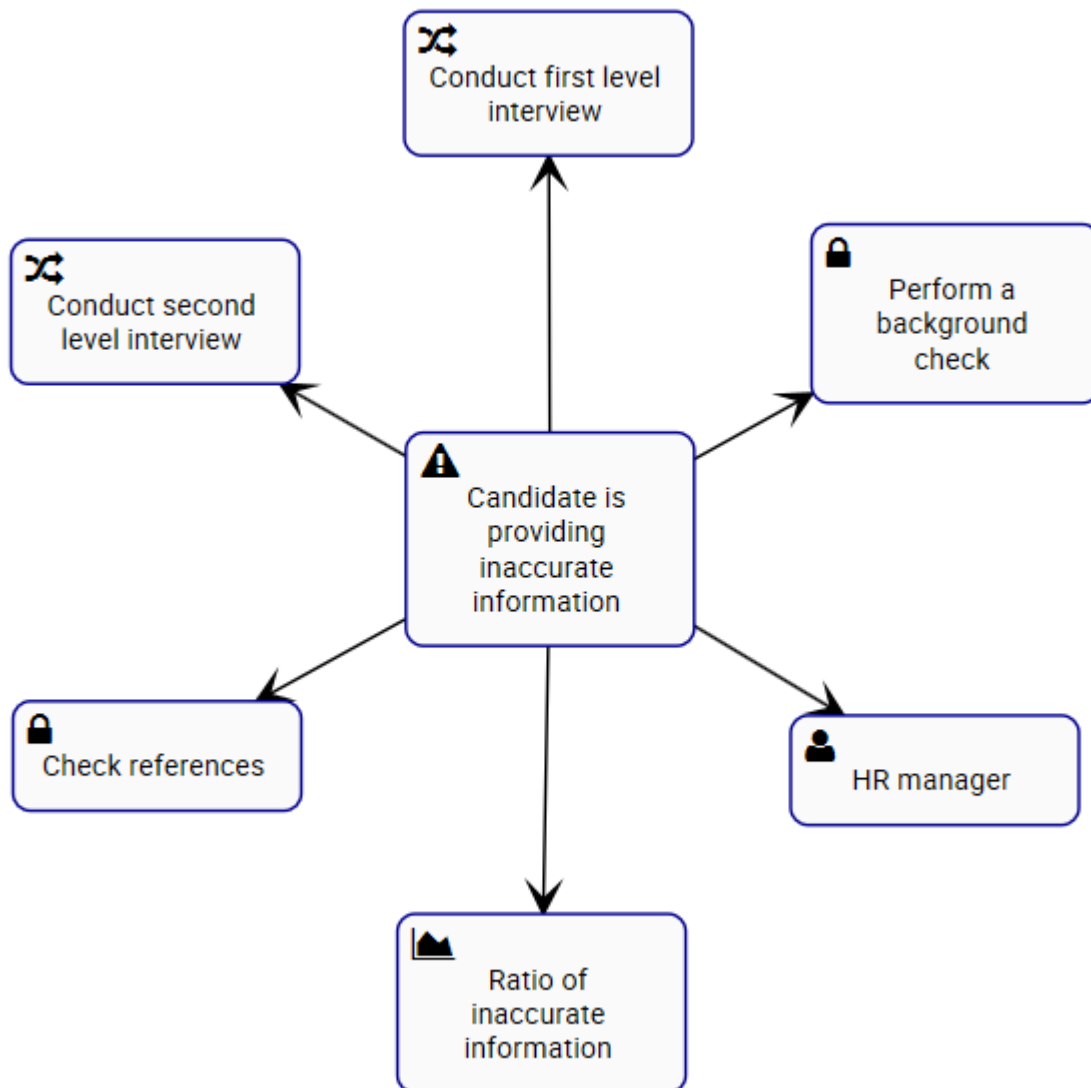


These Impact Graphs can be used to educate business users, to analyze internal business processes and help management optimize activities effectively. Additionally, they help in the preparation of change management plans, allowing managers to map out the effect of any organizational change

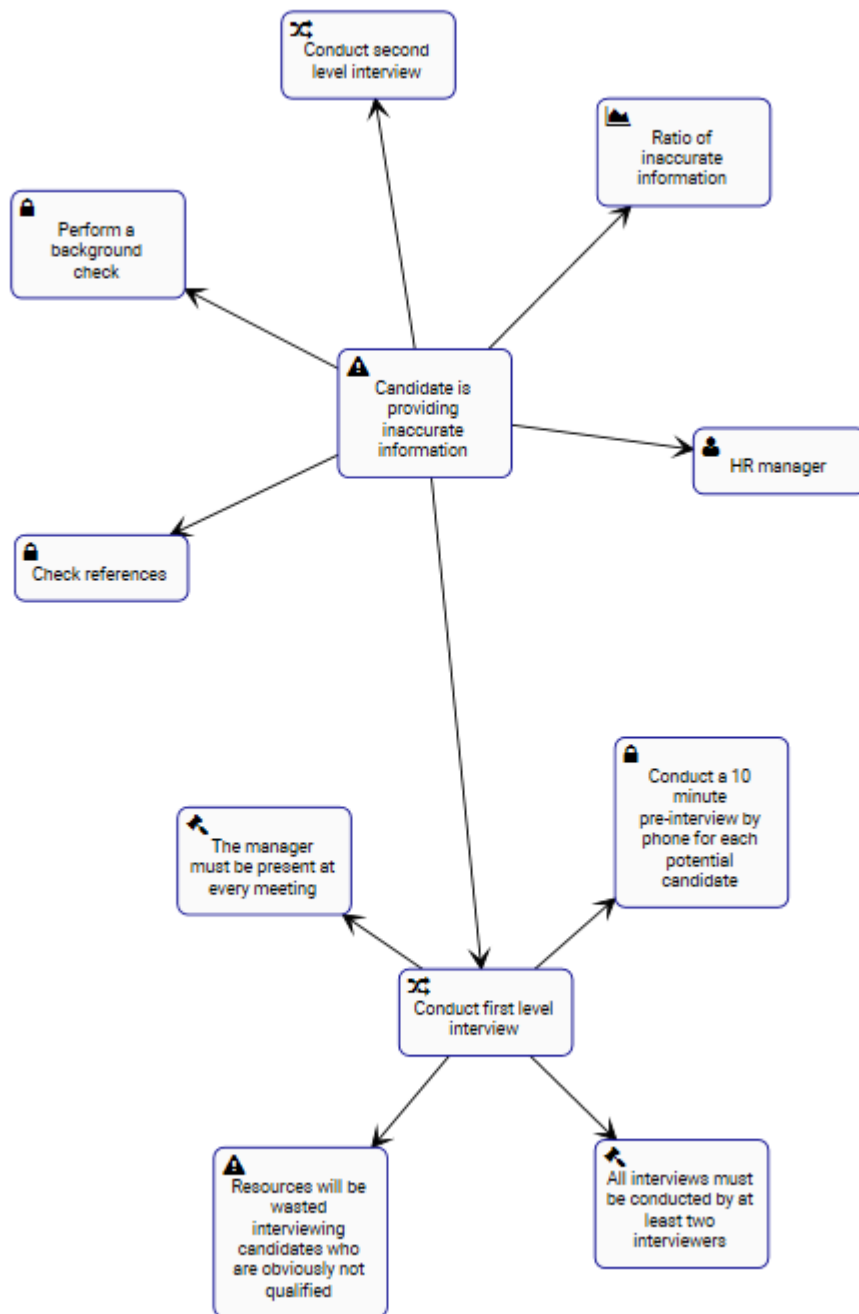
Impact Graph Navigation

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

1. Navigate to a Risk within the Risk Module
2. Click on the [Quick Graph View](#) icon 
3. You will be navigated to the specific item's Impact Graph



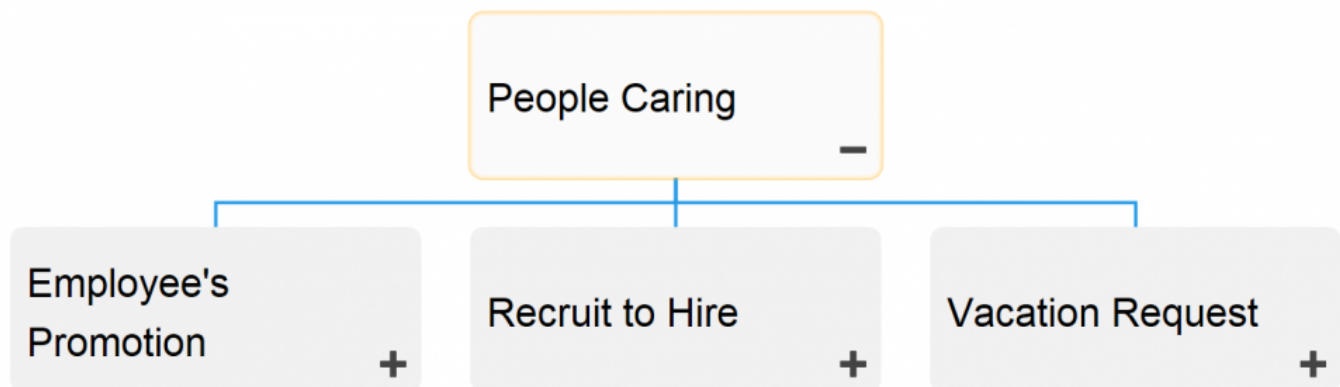
4. (Optional) To further expand the Impact Graph, simply double-click on the item to which you would like to display



4.8.3.3 Hierarchy Graph

Hierarchy Graphs allows users to view the vertical and horizontal hierarchy of Risk Sets and Risk Folders. This view provides users with a graphical representation of where specific Risks fit within the overall organization. This allows organizational users to understand organizational Risks 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 the Risk Module
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 “Risk Folders or Risk Sets” in List View


3. Select the [Quick Graph View](#) icon  of the desired item

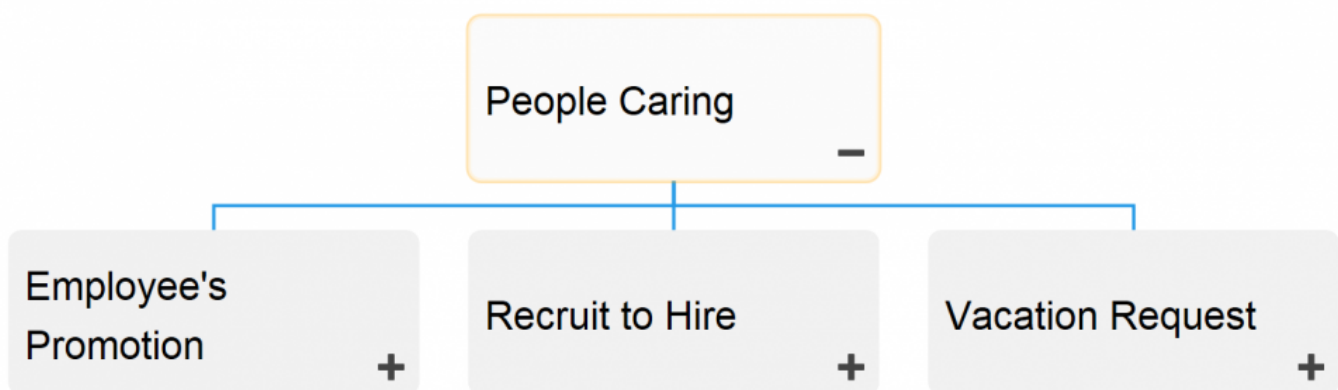
4. Please select the Hierarchy Graph icon 

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


People Caring

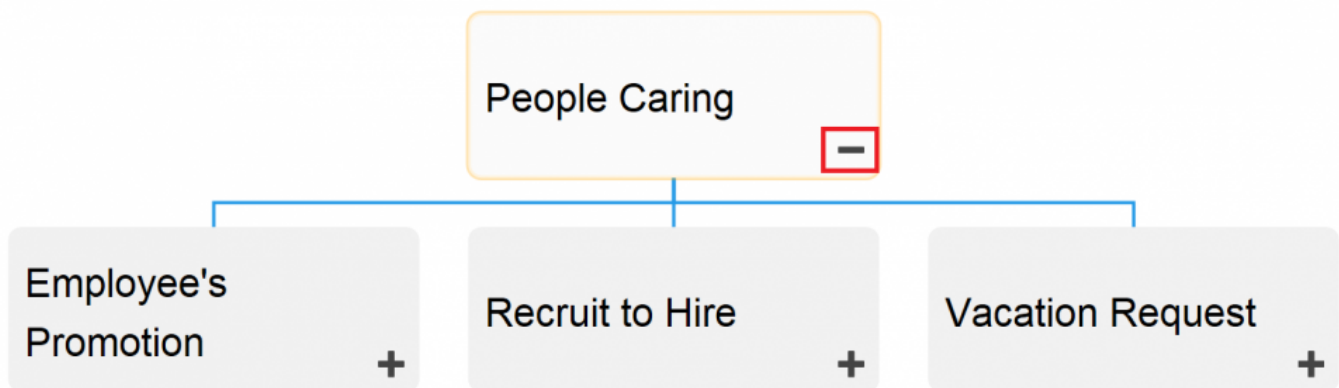


6. To further expand components of the Hierarchy Graph, double click on the  on the objects in the Graph. This will expand the item selected.



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

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



4.8.3.4 Risk Profile Graph

The Risk Profile graph is an interactive map that allows users to get a comprehensive view on a risk and controls applied. The Risk Profile graph is located under the [Details](#) section for a graph. The Risk Profile section displays two subsections, one called “Profile” and the other one “Analysis Justification.”

The Profile subsection displays on a graph the Gross Risk score, the Residual Risk score, and all the controls. Under the graph users can find an Impact and Likelihood Risk Matrix. The score highlighted on the Risk Matrix is the Residual Risk score.

☰

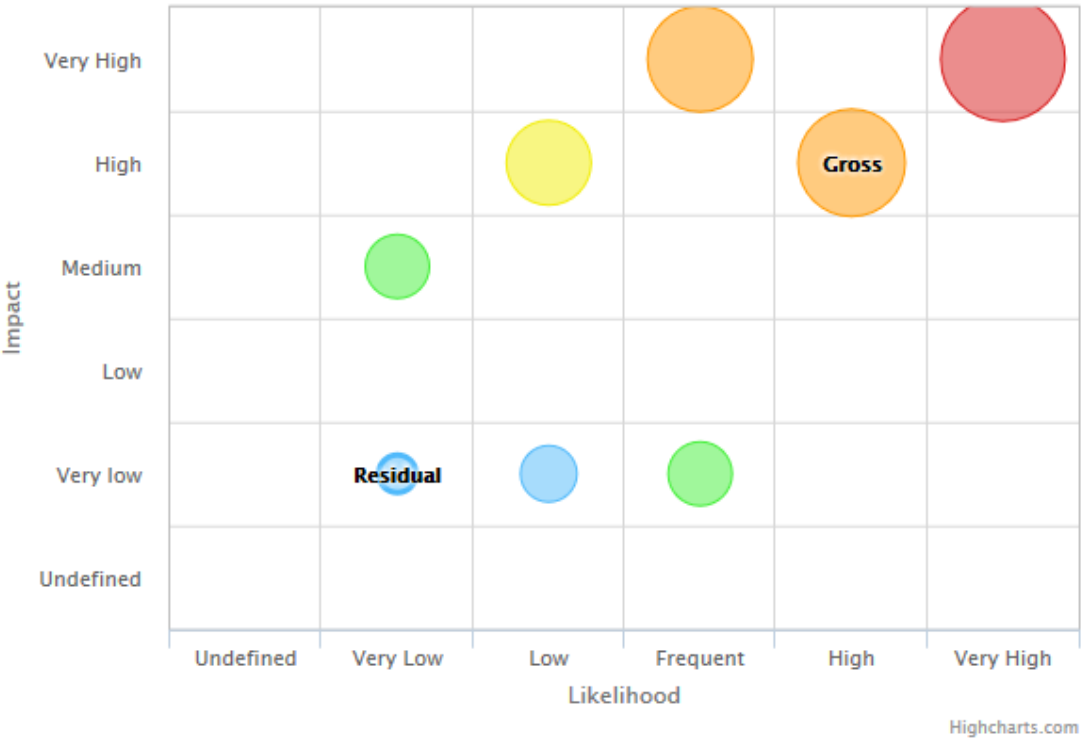
RISK

- >>
- LIST
- GRAPH
- DETAILS



Candidate is providing inaccurate information

- > Description
- ▼ Risk Profile
- ▼ Profile



		Likelihood				
		Very Low	Low	Frequent	High	Very High
Impact	Very low	10	21	30	40	50
	Low	20	41	65	80	100
	Medium	30	60	91	120	150
	High	40	80	120	160	201
	Very High	50	100	150	200	250

> Analysis Justification

The Risk Profile graph allows users to visualize and analyze how a Risk should be managed. On the graph, risks and controls are displayed with nodes along two dimensions. By clicking on the node, the user will obtain information concerning its type (Gross risk, residual risk, control), its impact, its likelihood, its priority, and its score.

☰

RISK

>>

LIST

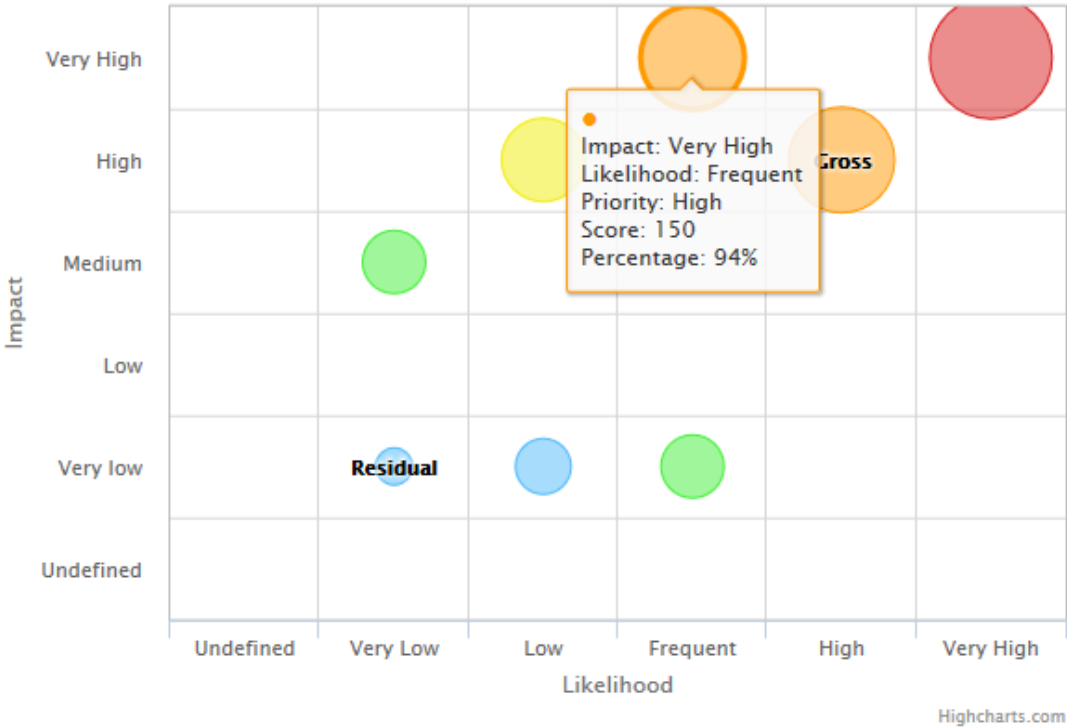
GRAPH

DETAILS



Candidate is providing inaccurate information

- > Description
- ▼ Risk Profile
- ▼ Profile



- Selected Control(s)
- Check references

		Likelihood				
		Very Low	Low	Frequent	High	Very High
Impact	Very low	10	21	30	40	50
	Low	20	41	65	80	100
	Medium	30	60	91	120	150
	High	40	80	120	160	201
	Very High	50	100	150	200	250

When users select a risk or control on the Risk Profile graph, the selection will be displayed on the Risk Matrix highlighting its overall score, its impact, and its likelihood. When a control is selected, the control's name will be displayed on top of the Risk Matrix. The score given is calculated depending on which priority is given by the modeler for the impact and likelihood of the risk or control. The Gross risk score is defined by the modeler, and the residual risk score is generated after the controls are applied. When there are no controls to a risk, the gross score is equal to the residual score.

☰

RISK

>>

LIST

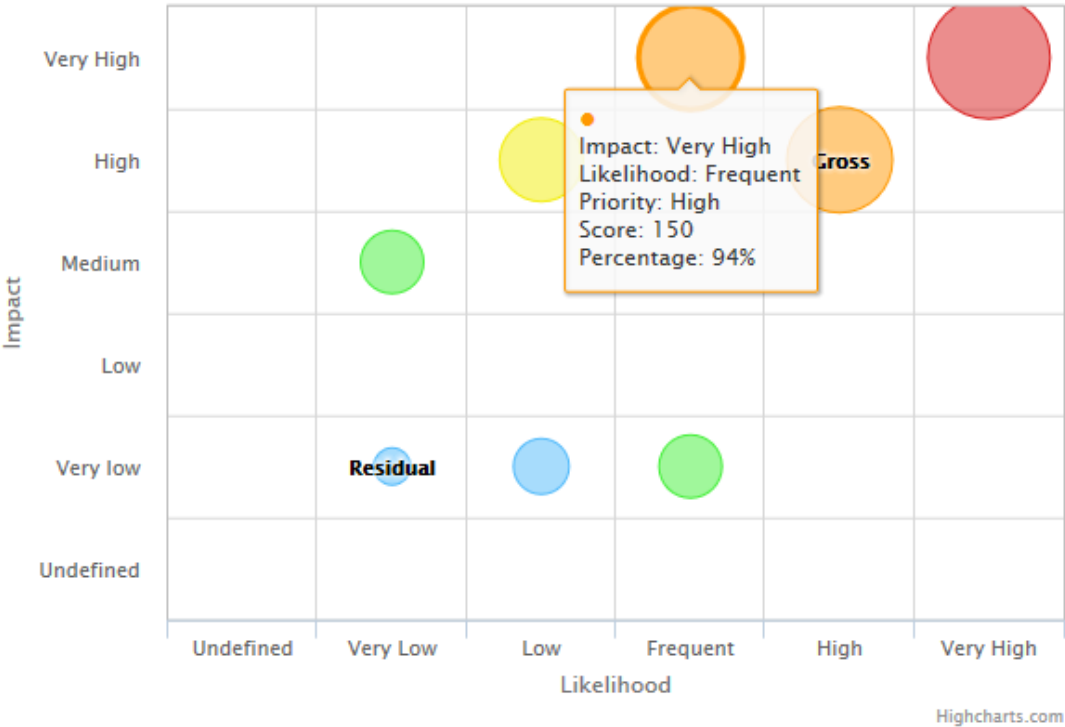
GRAPH

DETAILS



Candidate is providing inaccurate information

- > Description
- ▼ Risk Profile
- ▼ Profile



Selected Control(s)

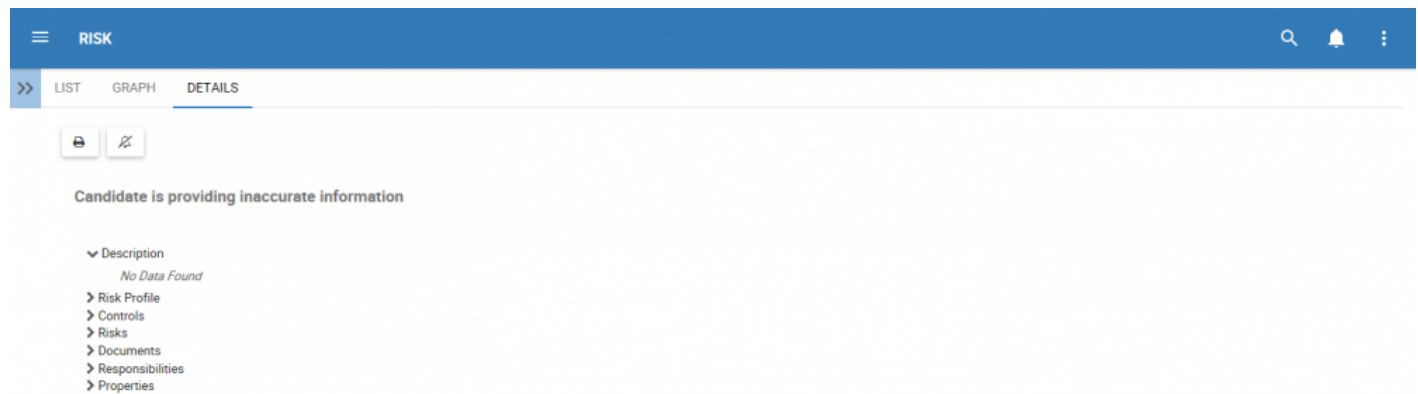
• Check references

		Likelihood				
		Very Low	Low	Frequent	High	Very High
Impact	Very low	10	21	30	40	50
	Low	20	41	65	80	100
	Medium	30	60	91	120	150
	High	40	80	120	160	201
	Very High	50	100	150	200	250

The Analysis Justification subsection displays a information about the Risk Profile inputted by the Modeler.

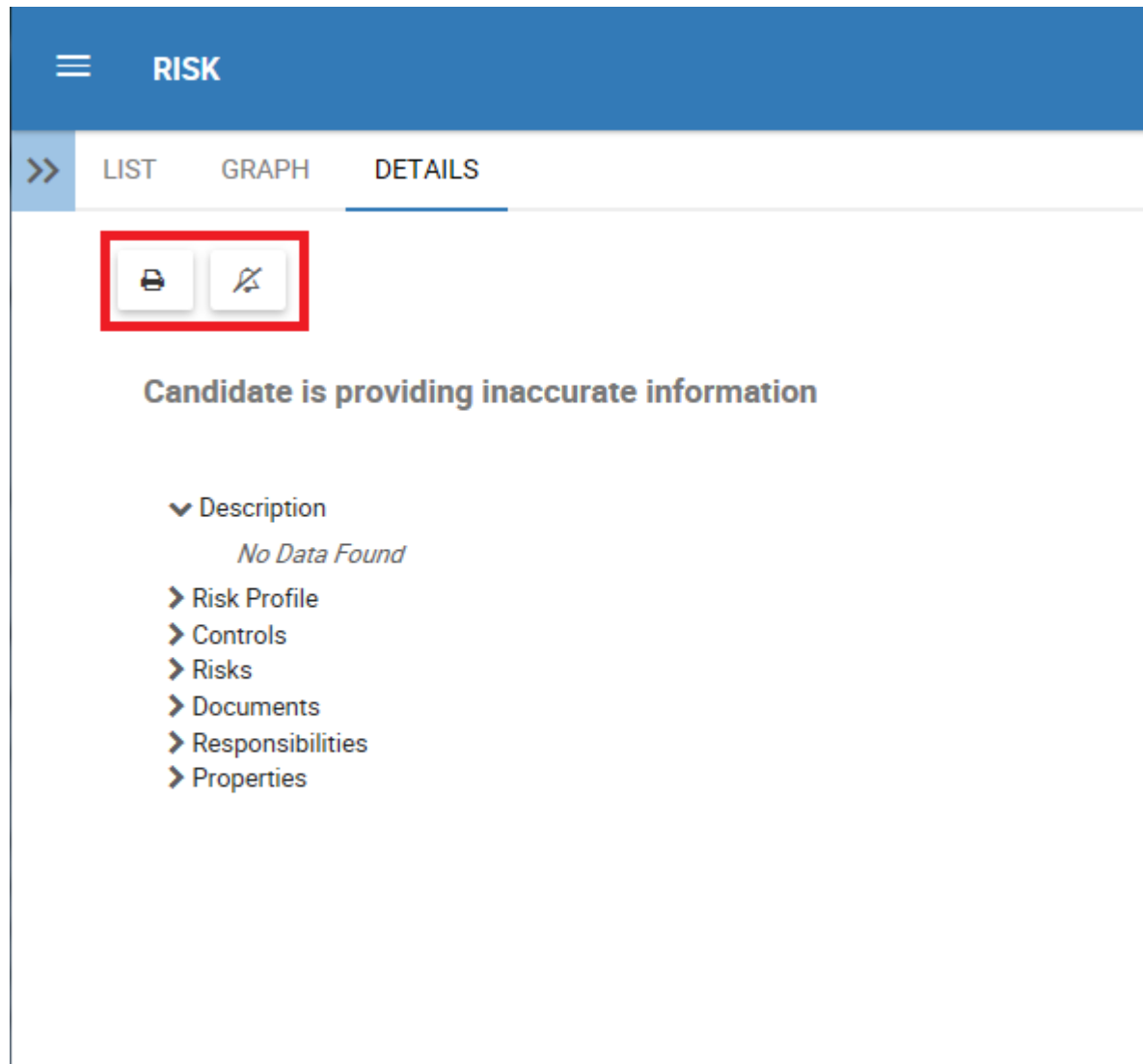
4.8.4 Details

The details section is where users can see all information about items including the [Risk Profile Graph](#). The Description section is where you will find details about the Risk folders, Risk Sets or Risks 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.






4.8.4.1 Navigation

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



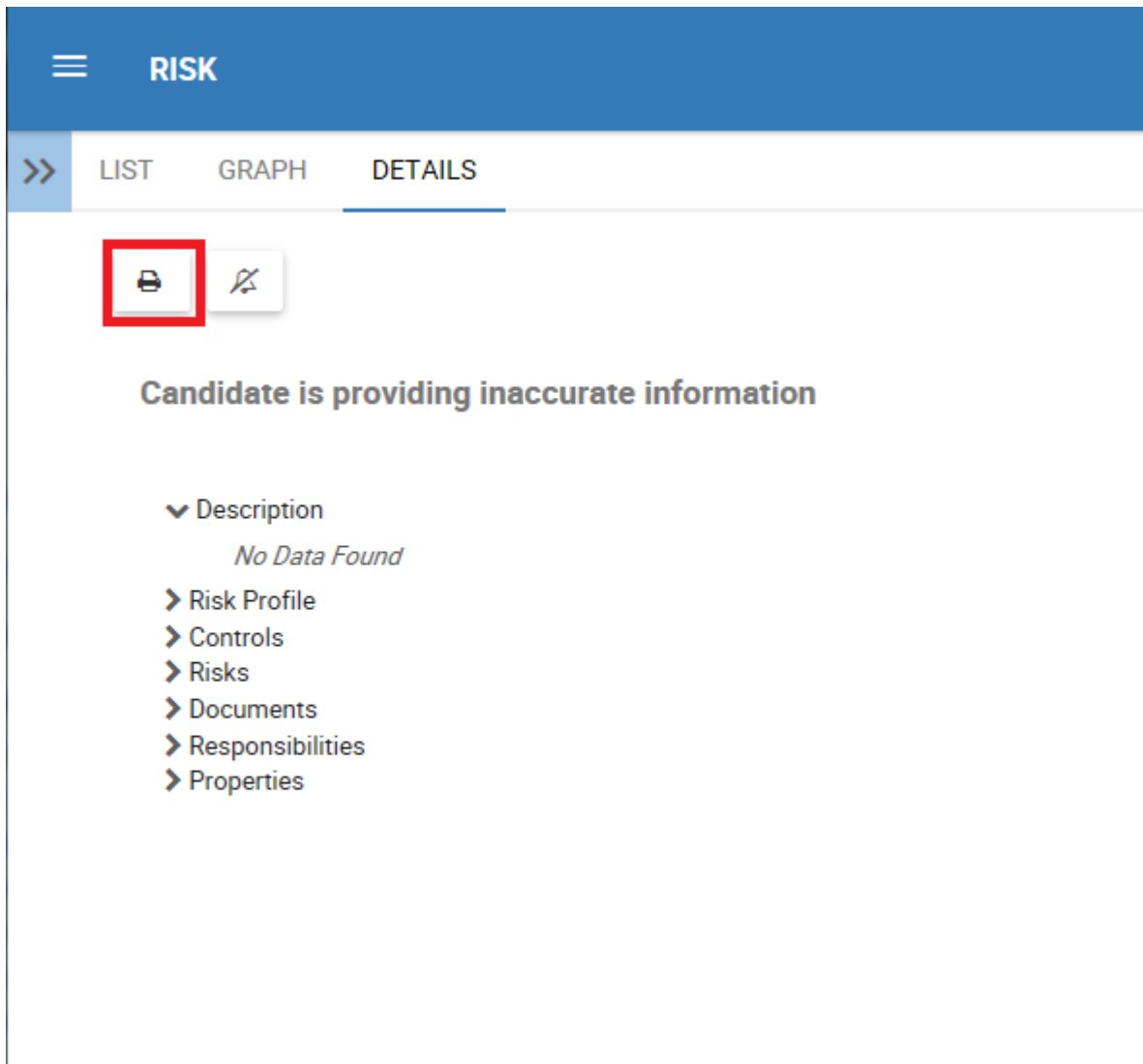
4.8.4.1.1 Toolbar

The toolbar on the Risk Module 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 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.



4.8.4.1.1.1 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.



4.8.4.1.1.2 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 rules to simplify and centralize monitoring activities. By subscribing to items, users will receive notifications when rules are altered or optimized, as well when another user collaborates or comments on the Risk. Additionally, a widget in the Home Page can be created with all the item the user subscribed to.

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


4.8.4.2 Attributes


Users can find a variety of information about objects within the details section. This information allows users to fully understand all information about a specific Risk, Risk Set or Risk Folder, and provides users with a specific destination that can be used to see and gather all relevant information.

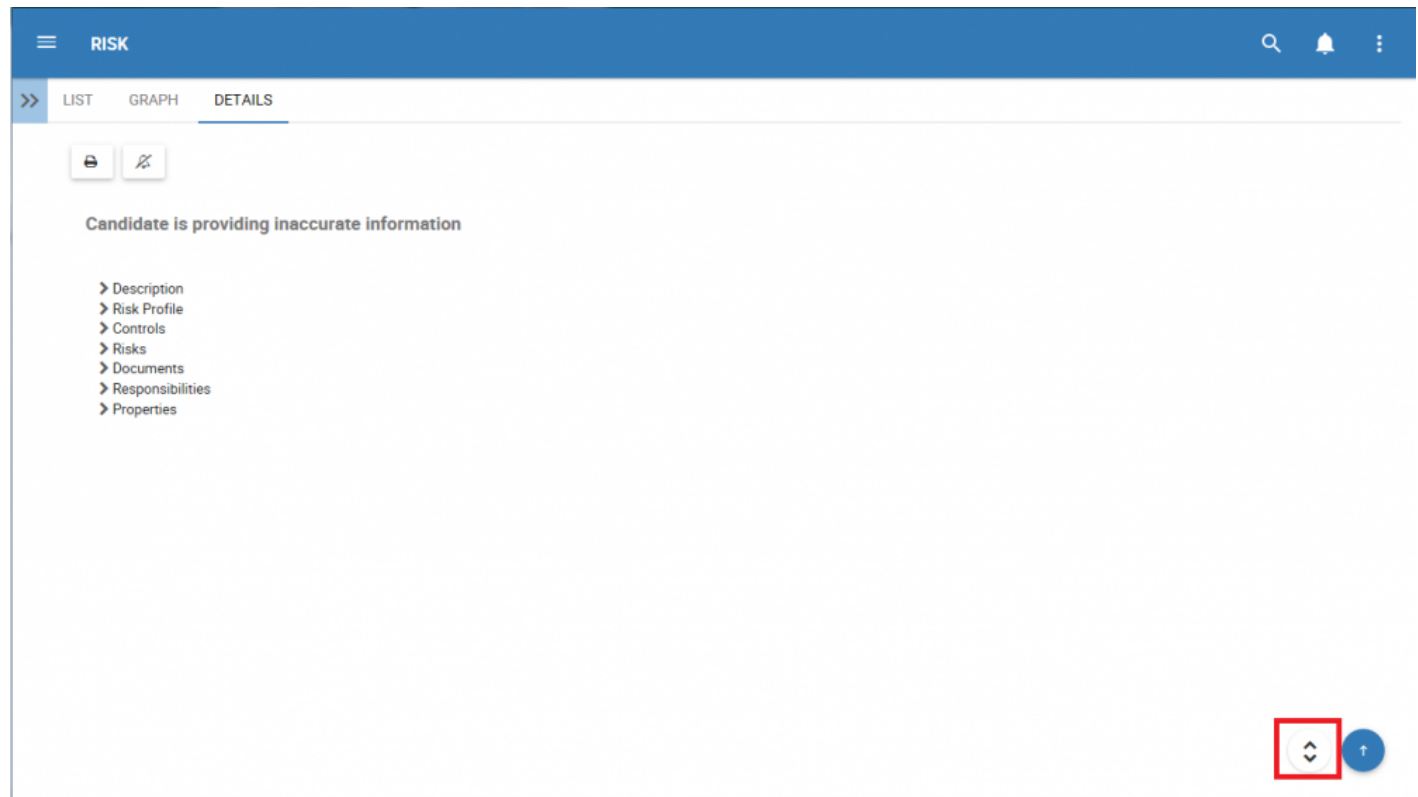
Risk Details display the following content

1. [Description](#)
2. [Risk Profile](#)
3. [Controls](#)
4. [Risks](#)
5. [Documents](#)
6. [Responsibilities](#)
7. [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

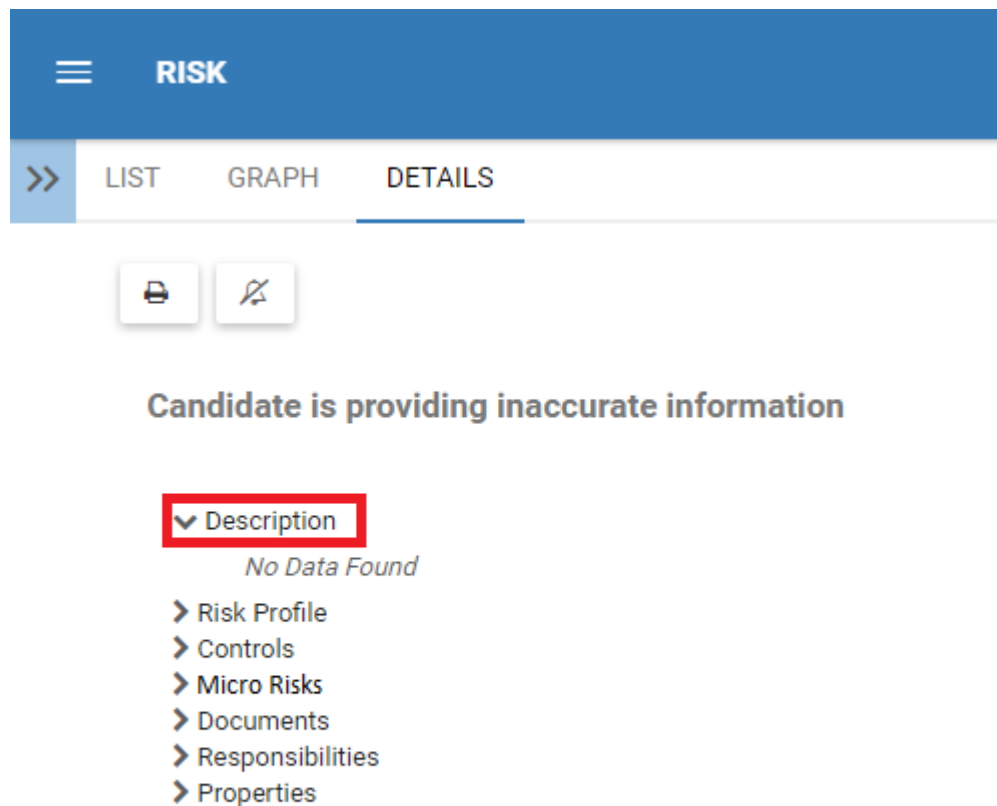


* Selecting different items will result in different information being displayed. The above components specifically relate to the information that will be provided for items.

* 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

4.8.4.2.1 Description

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



≡ RISK

>> LIST GRAPH DETAILS

🖨️ 🔗

Candidate is providing inaccurate information

▼ Description

No Data Found

- > Risk Profile
- > Controls
- > Micro Risks
- > Documents
- > Responsibilities
- > Properties

4.8.4.2.2 Risk Profile

To understand better the Risk Profile section, read [Risk Profile Graph](#).

4.8.4.2.3 Controls

The Controls section displays the controls associated to the Risk.

The screenshot shows the 'RISK' section of the application. At the top, there is a blue header with a menu icon and the word 'RISK'. Below this is a navigation bar with three tabs: 'LIST', 'GRAPH', and 'DETAILS'. The 'DETAILS' tab is currently selected. Below the navigation bar, there are two icons: a printer icon and a share icon. The main content area displays the title 'Candidate is providing inaccurate information'. Below the title, there is a list of expandable sections: 'Description', 'Risk Profile', 'Controls', 'Micro Risks', 'Documents', 'Responsibilities', and 'Properties'. The 'Controls' section is expanded, showing a list of controls: 'Candidates that have met qualifications in interviews are given specific performance tests', 'Check references', 'Conduct a 10 minute pre-interview by phone for each potential candidate', 'Ensure past experience is applicable to job description', 'Linkedin check', and 'Perform a background check'. The 'Controls' section title is highlighted with a red box.

RISK


>> LIST GRAPH DETAILS


Print Share



Candidate is providing inaccurate information

- > Description
- > Risk Profile
- ▼ Controls
 - Candidates that have met qualifications in interviews are given specific performance tests
 - Check references
 - Conduct a 10 minute pre-interview by phone for each potential candidate
 - Ensure past experience is applicable to job description
 - Linkedin check
 - Perform a background check
- > Micro Risks
- > Documents
- > Responsibilities
- > Properties







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

 **RISK**

 LIST GRAPH DETAILS

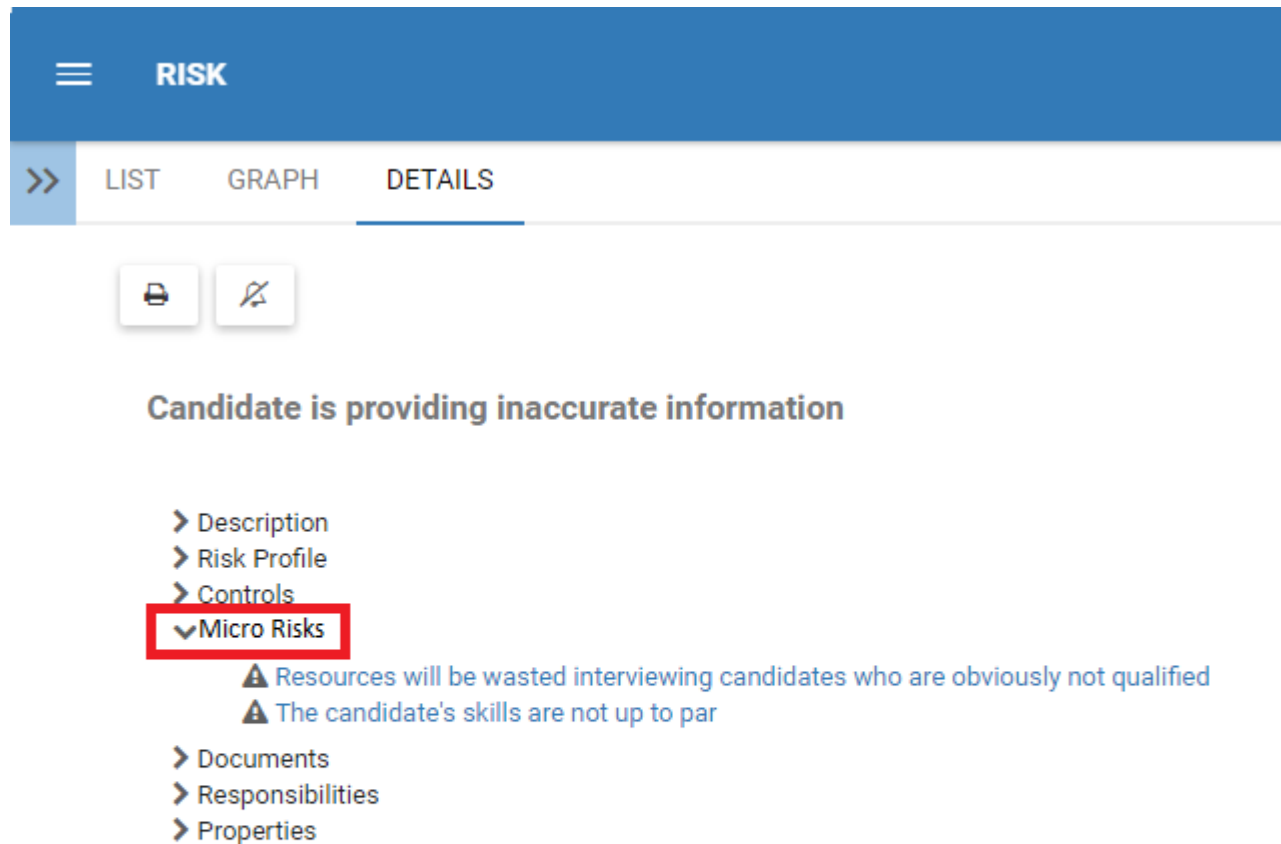
 

Candidate is providing inaccurate information

- > Description
- > Risk Profile
- ▼ Controls
 -  Candidates that have met qualifications in interviews are given specific performance tests
 -  **Check references**
 -  Conduct a 10 minute pre-interview by phone for each potential candidate
 -  Ensure past experience is applicable to job description
 -  LinkedIn check
 -  Perform a background check
- > Micro Risks
- > Documents
- > Responsibilities
- > Properties

4.8.4.2.4 Micro Risks

The Micro Risks section enables users to view the lower level risks associated to a higher level risk.



The screenshot shows the 'RISK' section of the web application. The top navigation bar is blue with a hamburger menu icon and the word 'RISK'. Below this is a tab bar with three tabs: 'LIST', 'GRAPH', and 'DETAILS'. The 'DETAILS' tab is selected and highlighted with a blue underline. Below the tabs are two icons: a printer icon and a share icon. The main content area displays the title 'Candidate is providing inaccurate information'. Below the title is a list of expandable sections: 'Description', 'Risk Profile', 'Controls', 'Micro Risks', 'Documents', 'Responsibilities', and 'Properties'. The 'Micro Risks' section is expanded, showing two items: 'Resources will be wasted interviewing candidates who are obviously not qualified' and 'The candidate's skills are not up to par'. Both items are preceded by a warning icon (a triangle with an exclamation mark).

RISK

>> LIST GRAPH DETAILS

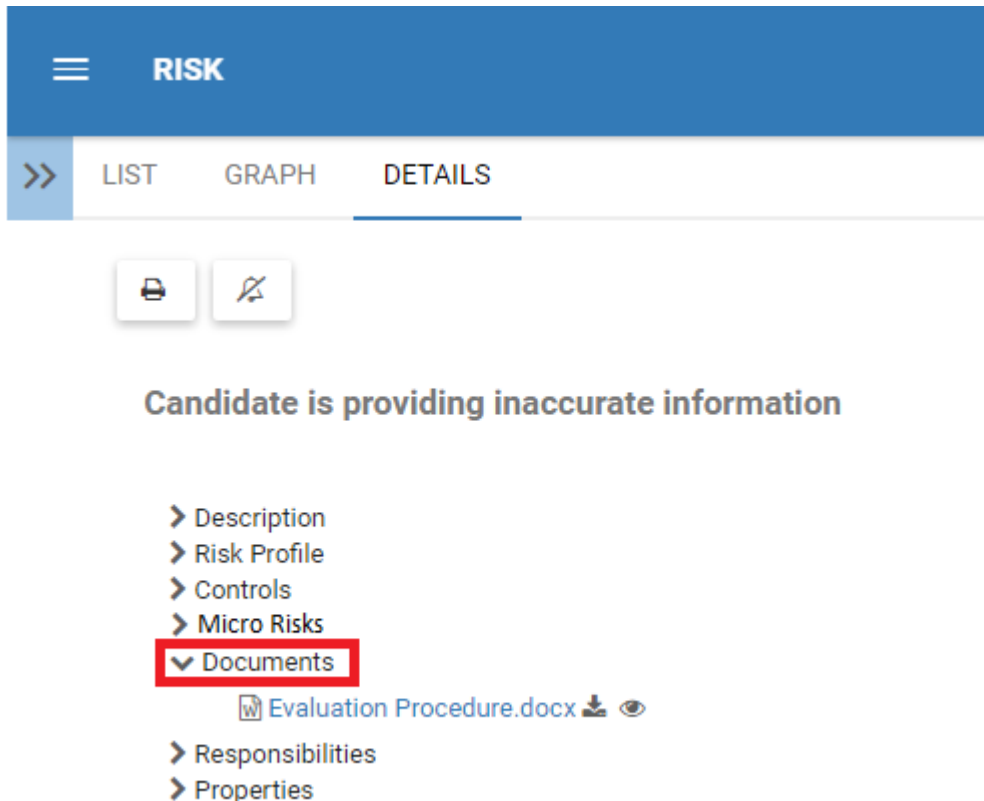
Print Share

Candidate is providing inaccurate information


- > Description
- > Risk Profile
- > Controls
- ▼ **Micro Risks**
 - ⚠ Resources will be wasted interviewing candidates who are obviously not qualified
 - ⚠ The candidate's skills are not up to par
- > Documents
- > Responsibilities
- > Properties

4.8.4.2.5 Documents

This section lists all documents that have tied to the Rule being viewed. This provides users with a list of relevant documents, as well as 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

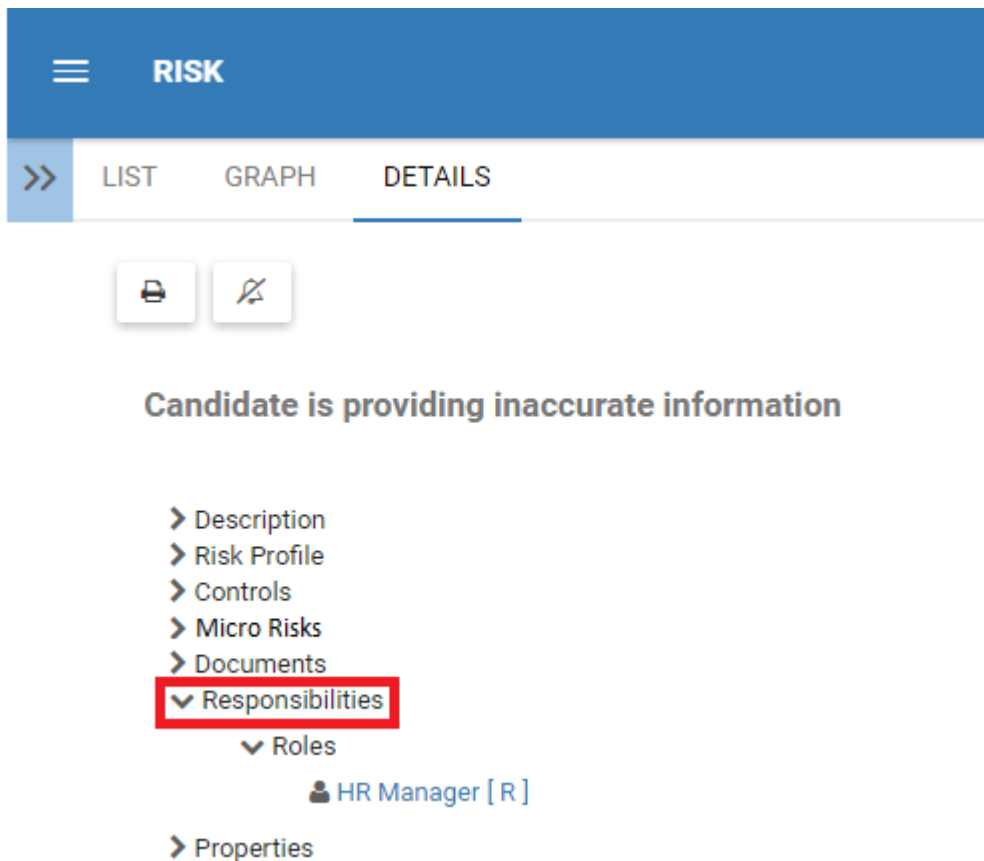
					
PDF Files	Available with extension Adobe Acrobat	Available with extension Adobe Acrobat	Available with extension Adobe Acrobat	Available with extension Adobe Acrobat	Available with extension Adobe Acrobat
Image Files • Png • Jpeg, jpg • Gif • Svg, svgz • Tif, tiff • Wbmp • Webp • Ico • Jng • bmp	Available (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
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](#) .

4.8.4.2.6 Responsibilities

The Responsibilities section displays the roles, resources and/or assets that are responsible for the Risk 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.



The screenshot shows the 'RISK' details page in a web application. The top navigation bar is blue with a hamburger menu icon and the word 'RISK'. Below it is a tab bar with 'LIST', 'GRAPH', and 'DETAILS' tabs, with 'DETAILS' being the active tab. Below the tabs are two icons: a printer icon and a share icon. The main content area displays the title 'Candidate is providing inaccurate information'. Below the title is a list of expandable sections: 'Description', 'Risk Profile', 'Controls', 'Micro Risks', 'Documents', 'Responsibilities', 'Roles', and 'Properties'. The 'Responsibilities' section is expanded and highlighted with a red box, showing a list of roles: 'HR Manager [R]'.

RISK

>> LIST GRAPH DETAILS

Print Share

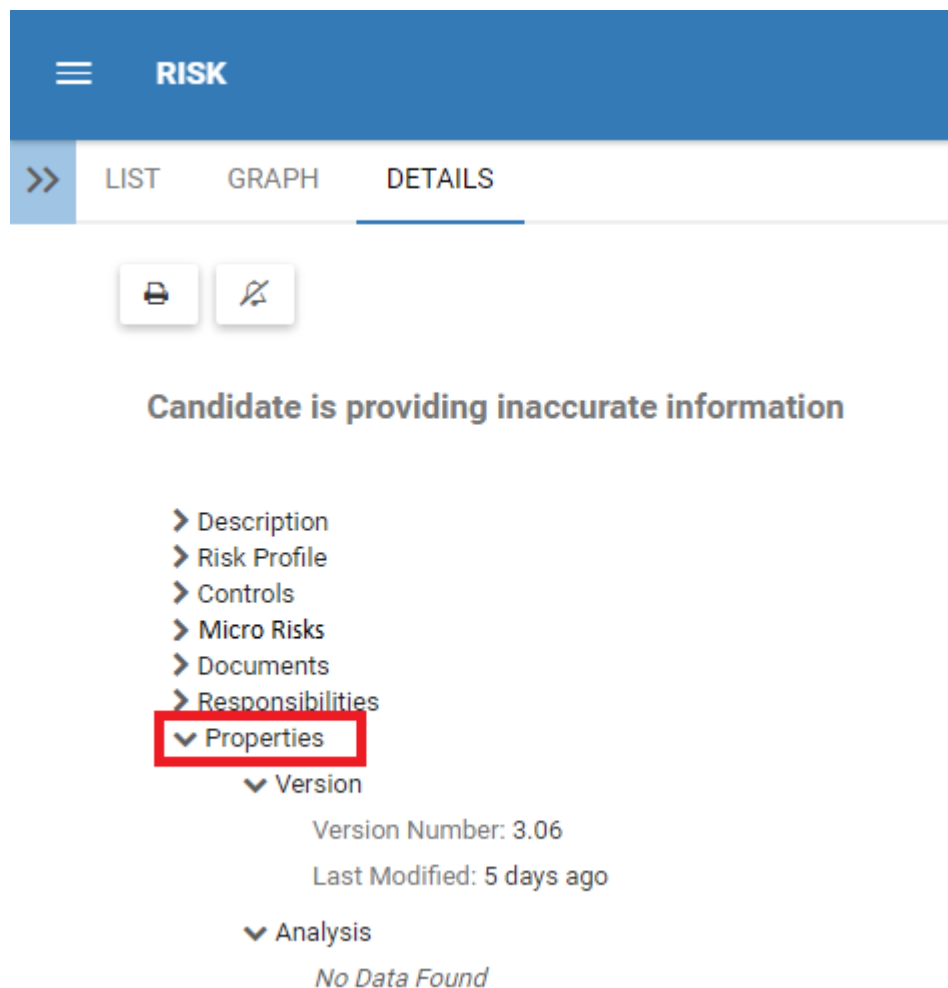
Candidate is providing inaccurate information

- > Description
- > Risk Profile
- > Controls
- > Micro Risks
- > Documents
- ▼ Responsibilities
 - ▼ Roles
 - HR Manager [R]
- > Properties

4.8.4.2.7 Properties

The properties section provides users with additional key information about items. The properties section is broken down into two 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 screenshot displays the 'RISK' section of the EPC10 WebApp. The 'DETAILS' tab is selected, and the 'Properties' section is expanded. The 'Version' section shows 'Version Number: 3.06' and 'Last Modified: 5 days ago'. The 'Analysis' section shows 'No Data Found'.

RISK

>> LIST GRAPH DETAILS

Candidate is providing inaccurate information

- > Description
- > Risk Profile
- > Controls
- > Micro Risks
- > Documents
- > Responsibilities
- ▼ Properties**
 - ▼ Version
 - Version Number: 3.06
 - Last Modified: 5 days ago
 - ▼ Analysis
 - No Data Found

4.9 Control

Users can display, classify and associate Controls to mitigate [Risks](#) and to ensure that [Business Rules](#) are respected and followed.

The EPC allows users to integrate Controls as part of business processes, clarifying and communicating the Control's objective, its importance and its procedure. Users will understand why controls are implemented and performed ensuring consistent execution.

The EPC will allow users to save time and to reduce the risk of redundancy because Controls can be modeled into several Risks or Rules simultaneously. Users can indicate how often the Control is executed, whether it is preventive or detective, performed manually or automatically, and more.

The EPC provides 2 types of graphs for users to view Controls

1. [Impact Graphs](#)
2. [Hierarchy Graphs](#)

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

4.9.1 Module Overview

EPC's Control Module allows users to view personal, role and company controls. The EPC provides 3 different dimensions, allowing users to properly view and understand their organizational structure.

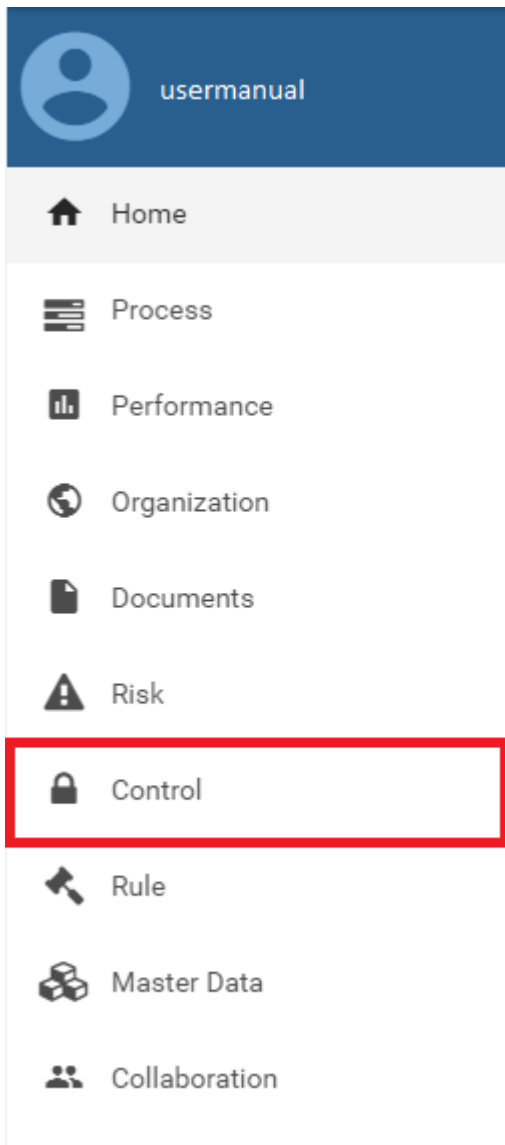
Dimension	Details
1. List	Provides view of all risk sets you have access to
2. Graph	Provides the visual representation of the risk set, their features and links (Impact and Hierarchy Graphs)
3. Details	Provides additional key information regarding specific risk details

How to access the Control module:

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



2. Click on **Control**



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

4.9.2 List

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

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
Subtype	Whether or not the item in question is associated to a Subtype
Category	Whether or not the item in question is associated to a Category
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
Key Control	Whether or not there is a Key Control inputted for the item in question
Audit Deadline	The Audit Deadline for the item in question
Control Review Date	The Control Review Date for the item in question
Type	The type of the object
Role	Whether or not there are Roles directly associated with the item in question
Modified Date	The last date that the object in question was modified
Status	View the status of the item in question when Show Latest mode is on



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

★ Name	Subtype	Category	Description	My RASCI-VS	Key Control	Audit Deadline	Control Review Date	Type	Role	Modified Date	Status
Accounting					No			Control Set		26-Sep-2017	Published
Audit					No			Control Set		26-Sep-2017	Published
Finance					No			Control Set		26-Sep-2017	Published
M.I.S.					No			Control Set		26-Sep-2017	Published
Marketing					No			Control Set		26-Sep-2017	Published
People Caring					No			Control Set		12-Sep-2017	Published

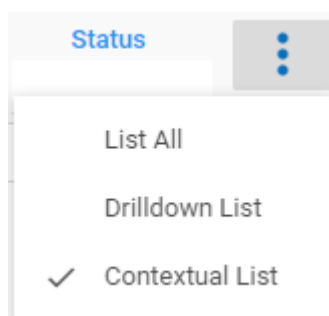
To simplify Control viewing; users **are not** greeted with all major Controls that they are associated too. Users are greeted with the list of Control Sets, the highest level of Control Classification in the EPC. However users can display these risks within the **List View**. Please see the **Optional**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



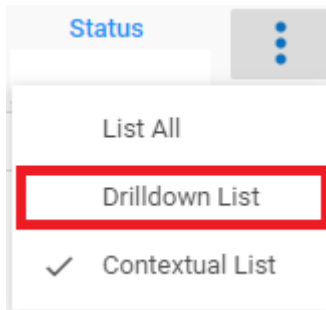
These steps are only required if a user is using an account or browser for the first time. As noted above, list preferences will be saved by user and browser to simplify navigation.

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-refresh the page

CONTROL												
>> LIST GRAPH DETAILS												
★	Name ▲	Subtype	Category	Description	My RASCI-VS	Key Control	Audit Deadline	Control Review Date	Type	Role	Modified Date	Status
🗄️ ☆	Accounting					No			Control Set		26-Sep-2017	Published
🗄️ ☆	Audit					No			Control Set		26-Sep-2017	Published
🗄️ ☆	Candidates that have met quali...		1		R	Yes		26-Dec-2017	Control	1	26-Sep-2017	Published
🗄️ ☆	Check references				R	No			Control	1	12-Sep-2017	Published
🗄️ ☆	Conduct a 10 minute pre-interview...				R	No			Control	1	12-Sep-2017	Published
🗄️ ☆	Finance					No			Control Set		26-Sep-2017	Published
🗄️ ☆	M.I.S.					No			Control Set		26-Sep-2017	Published
🗄️ ☆	Marketing					No			Control Set		26-Sep-2017	Published
🗄️ ☆	People Caring					No			Control Set		12-Sep-2017	Published
🗄️ ☆	Perform a background check				R	No			Control	1	12-Sep-2017	Published
🗄️ ☆	Recruit to Hire					No			Control Folder		12-Sep-2017	Published

4.9.2.1 Sorting

Sorting allows users to classify Controls 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 Control in List View:

Filter	Details
Favorite	Allows users to sort Controls by favorites vs. non-favorites
Name	Allows users to sort Controls by a key number or word within document name
Subtype	Allows users to sort Controls based on their Subtype
Key Control	Allows users to sort Controls based on if they have a Key Control or not
Control Review Date	Allows users to sort Controls chronologically by date last reviewed
Type	Allows users to sort Controls based on their specific type
Modified Date	Allows users to sort Controls chronologically by date last modified
Status	Allows users to sort Controls based on their status

How to use “Sorting” Function

1. Navigate to the Control 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.

CONTROL												
<div> <div>>></div> <div>LIST</div> <div>GRAPH</div> <div>DETAILS</div> </div>												
★ Name ▲	Subtype	Category	Description	My RASCI-VS	Key Control	Audit Deadline	Control Review Date	Type	Role	Modified Date	Status	
Accounting					No			Control Set		26-Sep-2017	Published	
Audit					No			Control Set		26-Sep-2017	Published	
Candidates that have met qualifica...		1		R	Yes		26-Dec-2017	Control	1	26-Sep-2017	Published	
Check references				R	No			Control	1	12-Sep-2017	Published	
Conduct a 10 minute pre-interview...				R	No			Control	1	12-Sep-2017	Published	
Finance					No			Control Set		26-Sep-2017	Published	
M.I.S.					No			Control Set		26-Sep-2017	Published	
Marketing					No			Control Set		26-Sep-2017	Published	
People Caring					No			Control Set		12-Sep-2017	Published	
Perform a background check				R	No			Control	1	12-Sep-2017	Published	
Recruit to Hire					No			Control Folder		12-Sep-2017	Published	

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

CONTROL												
<div> <div>>></div> <div>LIST</div> <div>GRAPH</div> <div>DETAILS</div> </div>												
★ Name ▼	Subtype	Category	Description	My RASCI-VS	Key Control	Audit Deadline	Control Review Date	Type	Role	Modified Date	Status	
Recruit to Hire					No			Control Folder		12-Sep-2017	Published	
Perform a background check				R	No			Control	1	12-Sep-2017	Published	
People Caring					No			Control Set		12-Sep-2017	Published	
Marketing					No			Control Set		26-Sep-2017	Published	
M.I.S.					No			Control Set		26-Sep-2017	Published	
Finance					No			Control Set		26-Sep-2017	Published	
Conduct a 10 minute pre-interview...				R	No			Control	1	12-Sep-2017	Published	
Check references				R	No			Control	1	12-Sep-2017	Published	
Candidates that have met qualifica...		1		R	Yes		26-Dec-2017	Control	1	26-Sep-2017	Published	
Audit					No			Control Set		26-Sep-2017	Published	
Accounting					No			Control Set		26-Sep-2017	Published	

4.9.2.2 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 Control list by the following.

Component	Description
Name	Textual search for any existing name of an object
Subtype	Subtypes created by admin
Category	Categories created by admin
My RASCI-VS	Responsible Accountable Support Consulted Informed Verifier Signatory
Key Control	Yes No
Audit Deadline	The specific dates for the Audit Deadlines
Control Review Date	The specific dates that things have been reviewed by
Type	Control Set Control Folder Control
Role	Empty – The object has no associated roles Not-Empty – The object has at least one associated role
Modified Date	The specific dates that things have been modified by
Status	In Progress Published Sent for a review Approved Rejected

The Filtering section will cover the following:

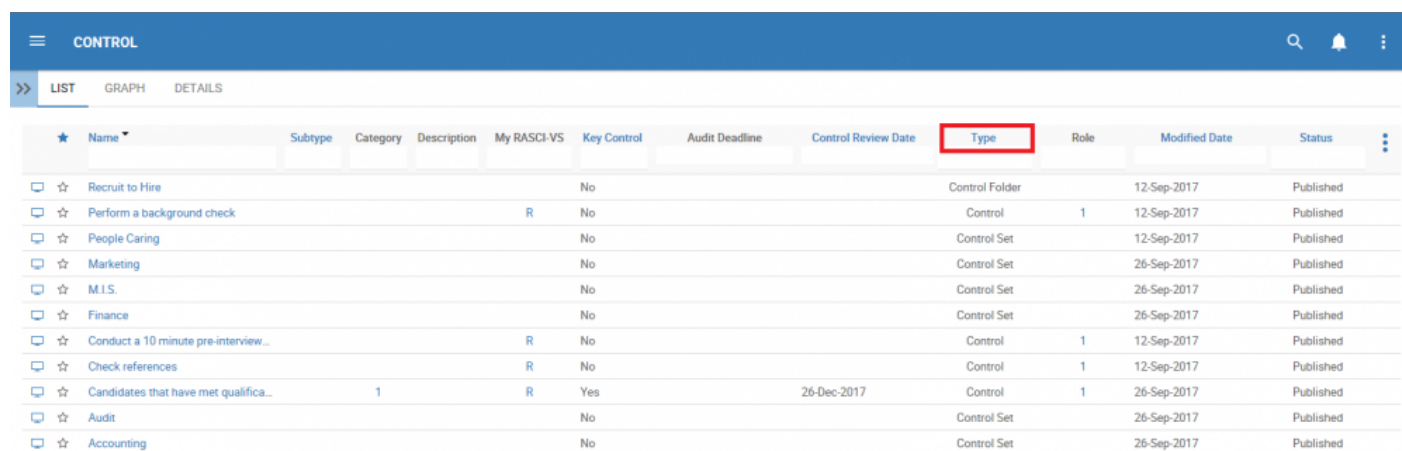
1. [How to Add Filters](#)
2. [How to Remove Filters](#)
3. [How to Combine Filters](#)

4.9.2.2.1 Add Filter

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

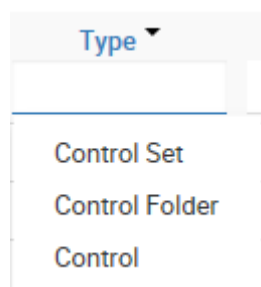
How to Add Filter

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



CONTROL												
LIST GRAPH DETAILS												
★	Name ▼	Subtype	Category	Description	My RASCI-VS	Key Control	Audit Deadline	Control Review Date	Type	Role	Modified Date	Status
☐ ☆	Recruit to Hire					No			Control Folder		12-Sep-2017	Published
☐ ☆	Perform a background check				R	No			Control	1	12-Sep-2017	Published
☐ ☆	People Caring					No			Control Set		12-Sep-2017	Published
☐ ☆	Marketing					No			Control Set		26-Sep-2017	Published
☐ ☆	M.I.S.					No			Control Set		26-Sep-2017	Published
☐ ☆	Finance					No			Control Set		26-Sep-2017	Published
☐ ☆	Conduct a 10 minute pre-interview...				R	No			Control	1	12-Sep-2017	Published
☐ ☆	Check references				R	No			Control	1	12-Sep-2017	Published
☐ ☆	Candidates that have met qualifica...		1		R	Yes		26-Dec-2017	Control	1	26-Sep-2017	Published
☐ ☆	Audit					No			Control Set		26-Sep-2017	Published
☐ ☆	Accounting					No			Control Set		26-Sep-2017	Published

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



3. Select the desired filter. For this example, we will select **Control** and **Control Set**.

≡

CONTROL

🔍

🔔

⋮

>>

LIST

GRAPH

DETAILS

★	Name	Subtype	Category	Description	My RASCI-VS	Key Control	Audit Deadline	Control Review Date	Type	Role	Modified Date	Status
									<div>Control x</div> <div>Control Set x</div>			
📄 ☆	Accounting					No			Control Set		26-Sep-2017	Published
📄 ☆	Audit					No			Control Set		26-Sep-2017	Published
📄 ☆	Finance					No			Control Set		26-Sep-2017	Published
📄 ☆	M.I.S.					No			Control Set		26-Sep-2017	Published
📄 ☆	Marketing					No			Control Set		26-Sep-2017	Published
📄 ☆	People Caring					No			Control Set		12-Sep-2017	Published
📄 ☆	Candidates that have met qualifica...		1		R	Yes		26-Dec-2017	Control	1	26-Sep-2017	Published
📄 ☆	Check references				R	No			Control	1	12-Sep-2017	Published
📄 ☆	Conduct a 10 minute pre-interview...				R	No			Control	1	12-Sep-2017	Published
📄 ☆	Perform a background check				R	No			Control	1	12-Sep-2017	Published

4.9.2.2.2 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.

CONTROL												
>> LIST GRAPH DETAILS												
★	Name	Subtype	Category	Description	My RASCI-VS	Key Control	Audit Deadline	Control Review Date	Type	Role	Modified Date	Status
									Control x			
									Control Set			
☐ ☆	Accounting					No			Control Set		26-Sep-2017	Published
☐ ☆	Audit					No			Control Set		26-Sep-2017	Published
☐ ☆	Finance					No			Control Set		26-Sep-2017	Published
☐ ☆	M.I.S.					No			Control Set		26-Sep-2017	Published
☐ ☆	Marketing					No			Control Set		26-Sep-2017	Published
☐ ☆	People Caring					No			Control Set		12-Sep-2017	Published
☐ ☆	Candidates that have met qualifica...		1		R	Yes		26-Dec-2017	Control	1	26-Sep-2017	Published
☐ ☆	Check references				R	No			Control	1	12-Sep-2017	Published
☐ ☆	Conduct a 10 minute pre-interview...				R	No			Control	1	12-Sep-2017	Published
☐ ☆	Perform a background check				R	No			Control	1	12-Sep-2017	Published


4.9.2.2.3 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](#).

4.9.2.3 Quick Graph View

Quick Graph View is a feature of the EPC Web App that allows users to immediately view Controls 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 Control 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.

≡

CONTROL

🔍

🔔










⋮

>>

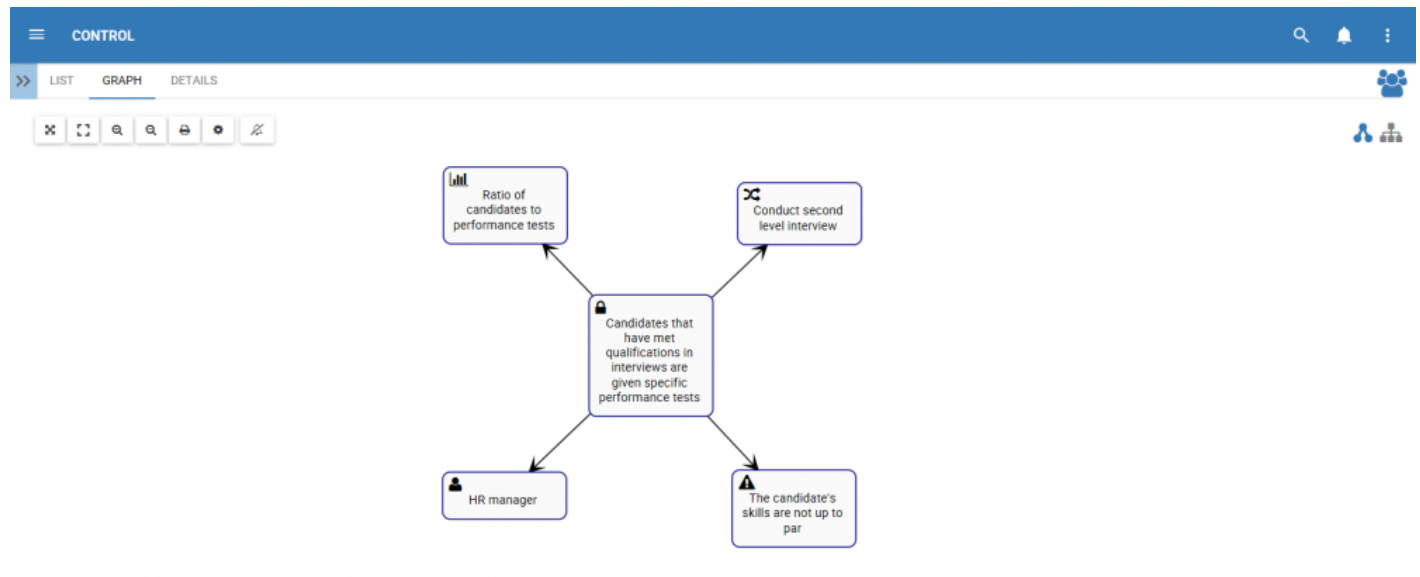
LIST

GRAPH

DETAILS

★	Name	Subtype	Category	Description	My RASCI-VS	Key Control	Audit Deadline	Control Review Date	Type ▲	Role	Modified Date	Status	⋮
	★ Candidates that have met qualifica...		1		R	Yes		26-Dec-2017	Control	1	26-Sep-2017	Published	
	★ Check references				R	No			Control	1	12-Sep-2017	Published	
	★ Conduct a 10 minute pre-interview...				R	No			Control	1	12-Sep-2017	Published	
	★ Perform a background check				R	No			Control	1	12-Sep-2017	Published	
	★ Recruit to Hire					No			Control Folder		12-Sep-2017	Published	
	★ Accounting					No			Control Set		26-Sep-2017	Published	
	★ Audit					No			Control Set		26-Sep-2017	Published	
	★ Finance					No			Control Set		26-Sep-2017	Published	
	★ M.I.S.					No			Control Set		26-Sep-2017	Published	
	★ Marketing					No			Control Set		26-Sep-2017	Published	
	★ People Caring					No			Control Set		12-Sep-2017	Published	

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.

4.9.3 Graph

Graphs are used as a visual representation of Controls. Graphs allow organizations and users to map out their Controls and provide key stakeholders with necessary information. They provide users with a high-level overview of Controls, as well as the risks affected by these Controls

The following will be covered in the Graph section:

1. [Graph Navigation](#)
2. Graph Types ([Impact](#), [Hierarchy](#))

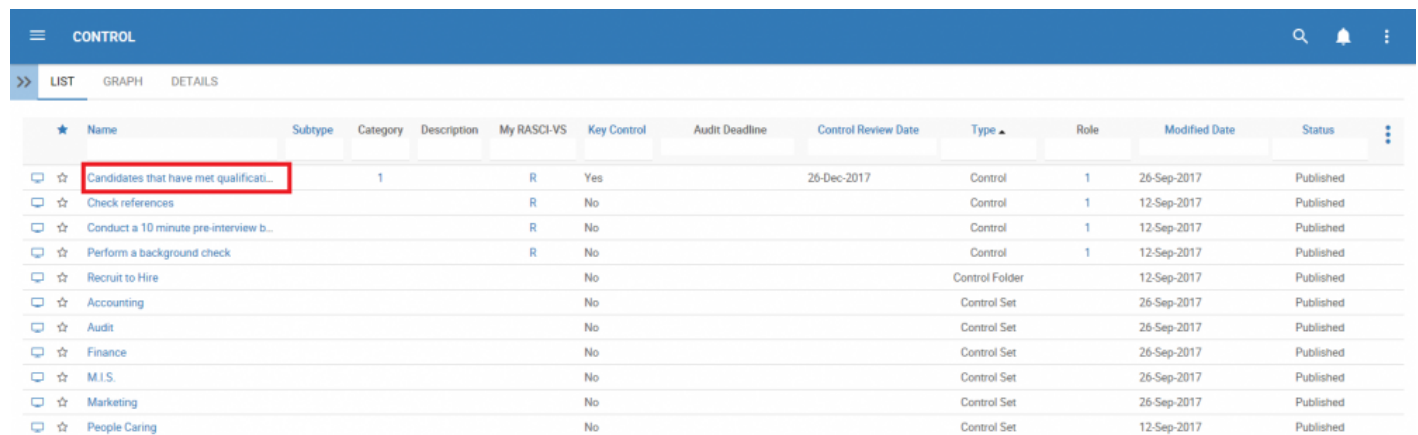
4.9.3.1 Graph Navigation

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.

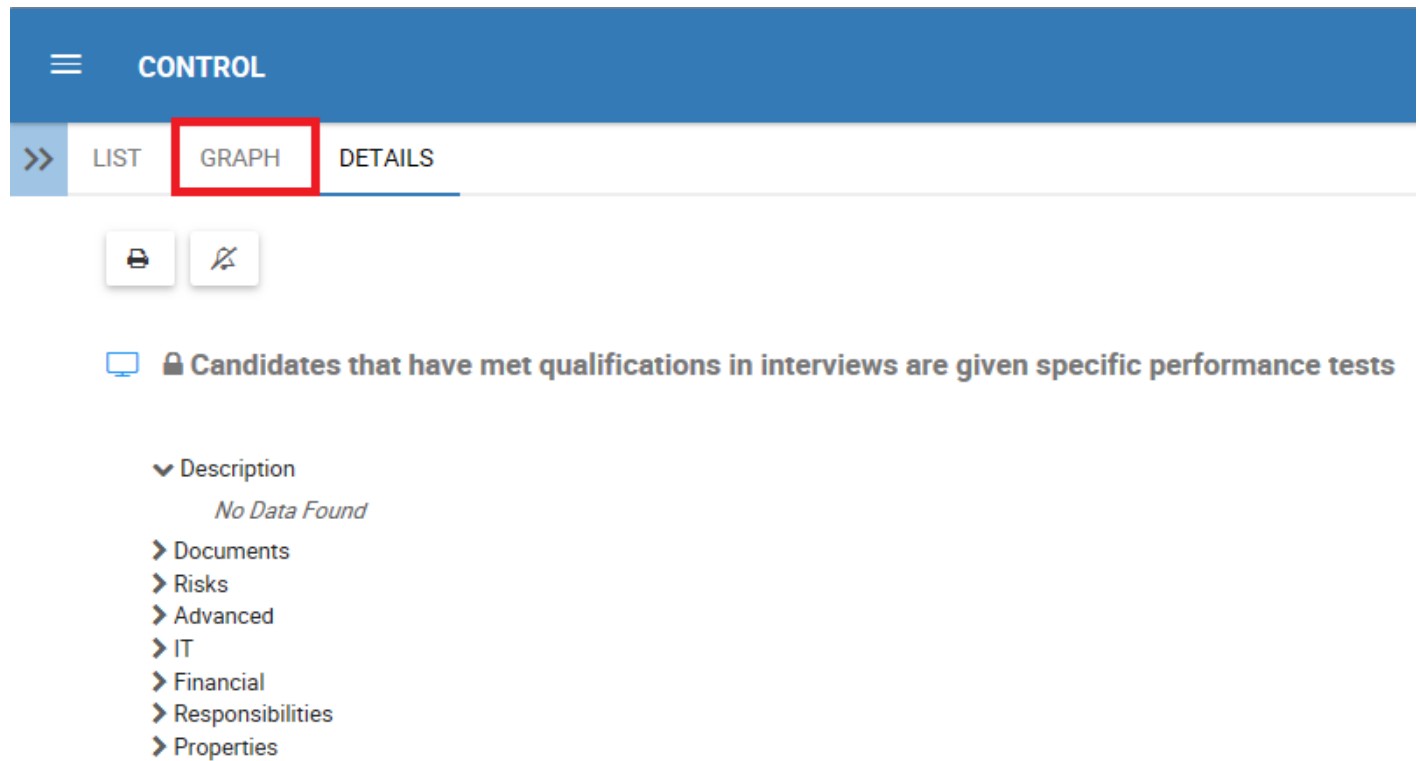
How to navigate to the Graph section (Manual Navigation)

1. Click on the **Navigation Menu Button** on the top left of your screen.
2. Click on **Control**
3. By default, you will be directed to **List View** in the Control module.
4. Select any item on the list by clicking on the desired line of the item

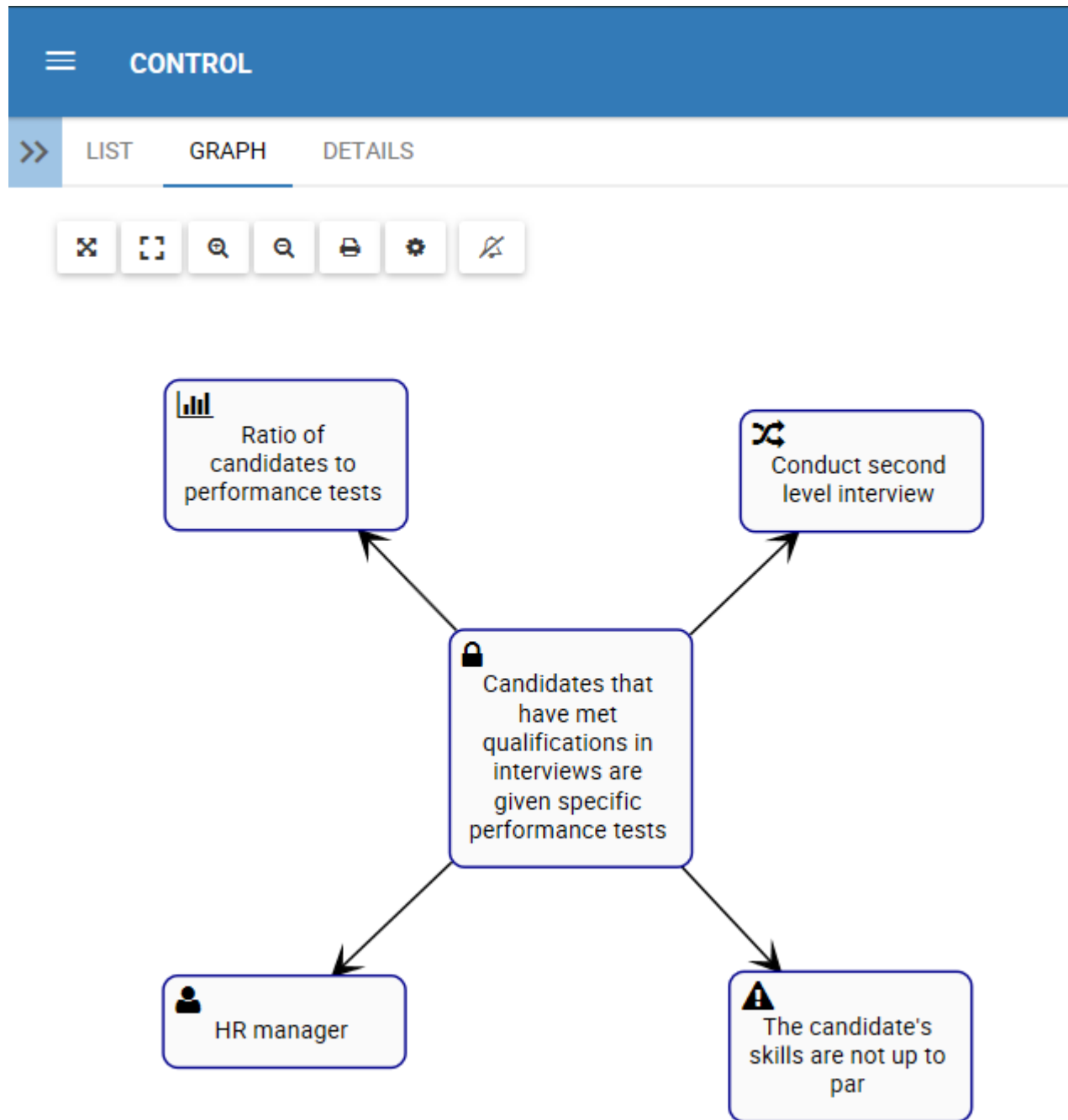


★	Name	Subtype	Category	Description	My RASCI-VS	Key Control	Audit Deadline	Control Review Date	Type ▲	Role	Modified Date	Status
☐ ☆	Candidates that have met qualificati...		1		R	Yes		26-Dec-2017	Control	1	26-Sep-2017	Published
☐ ☆	Check references				R	No			Control	1	12-Sep-2017	Published
☐ ☆	Conduct a 10 minute pre-interview b...				R	No			Control	1	12-Sep-2017	Published
☐ ☆	Perform a background check				R	No			Control	1	12-Sep-2017	Published
☐ ☆	Recruit to Hire					No			Control Folder		12-Sep-2017	Published
☐ ☆	Accounting					No			Control Set		26-Sep-2017	Published
☐ ☆	Audit					No			Control Set		26-Sep-2017	Published
☐ ☆	Finance					No			Control Set		26-Sep-2017	Published
☐ ☆	M.I.S.					No			Control Set		26-Sep-2017	Published
☐ ☆	Marketing					No			Control Set		26-Sep-2017	Published
☐ ☆	People Caring					No			Control Set		12-Sep-2017	Published

5. You will be prompted to the item’s details page
6. Select the “Graph” tab on the upper left corner of the page

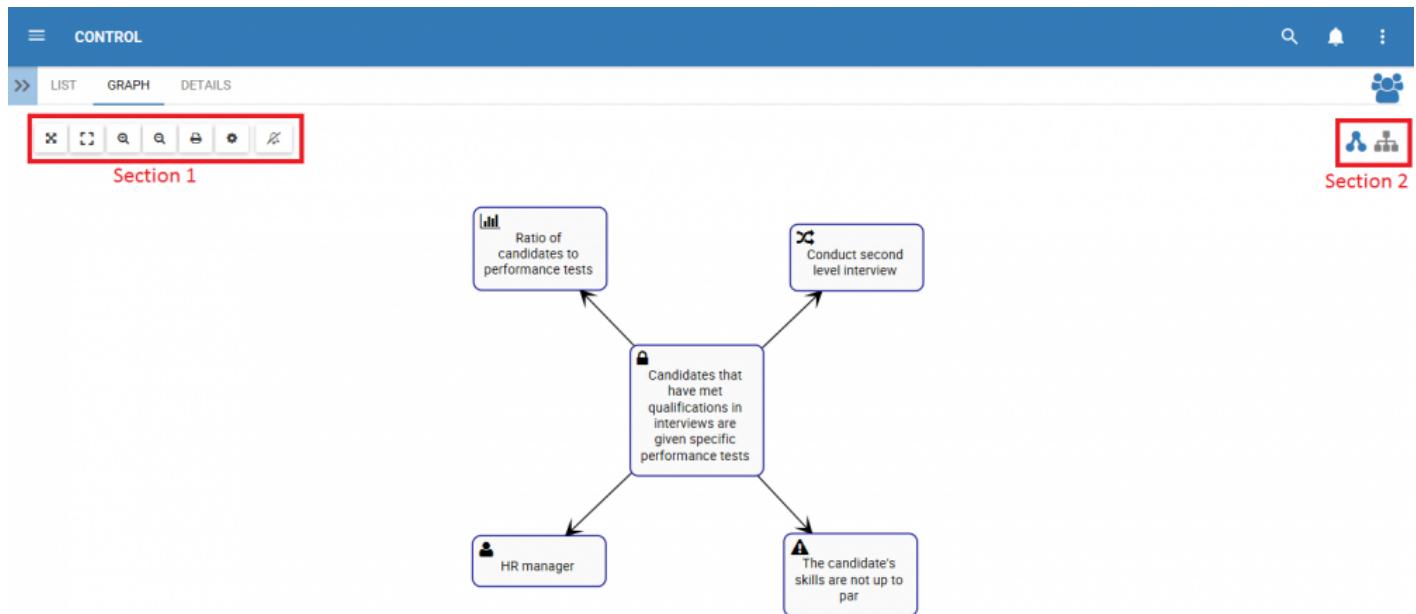


7. You will be navigated to the Graph section. By default, users will be sent to Impact view as the default Graph view. An example of this view can be seen below.





4.9.3.1.1 Navigation 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
Options		This button will allow a user to modify the settings associated with their Graphs

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.

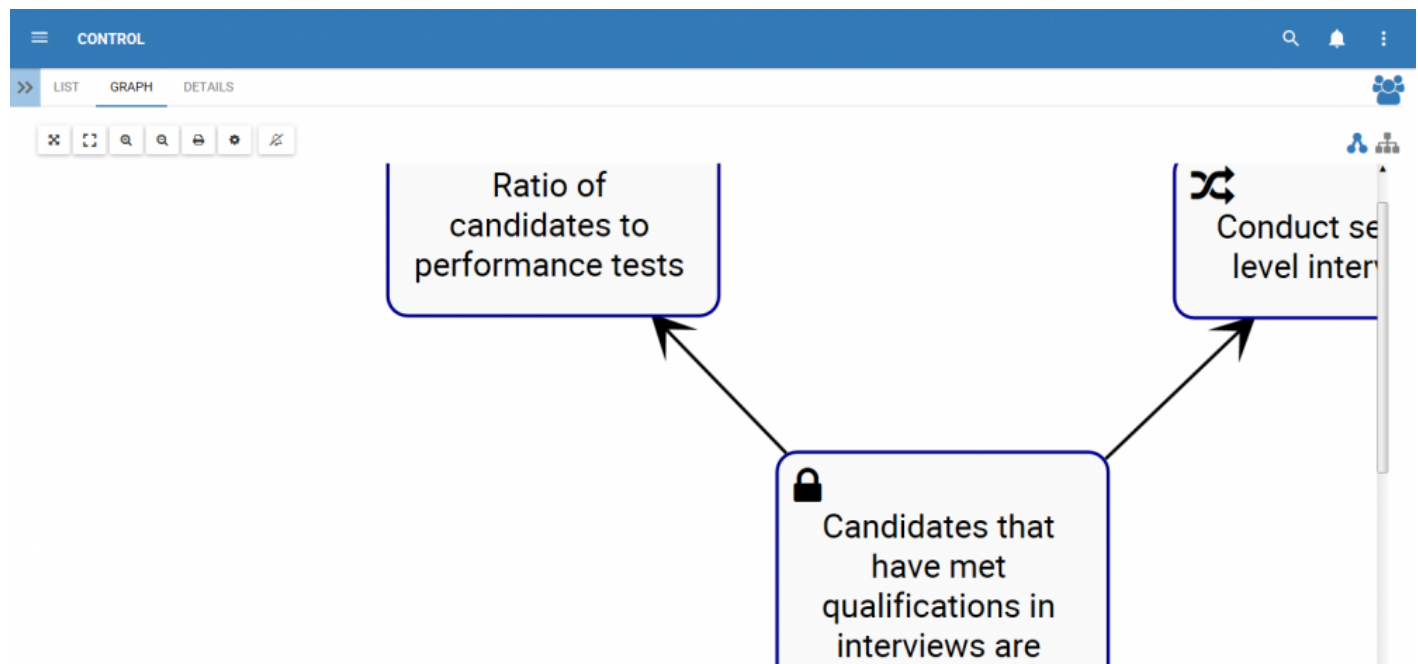
Item	Icon	Description
Impact Graph		Graph showing downstream representation of associated items
Hierarchy Graph		Graph showing a top-down view of items and how they fit within organizations


4.9.3.1.1.1 Fit Screen

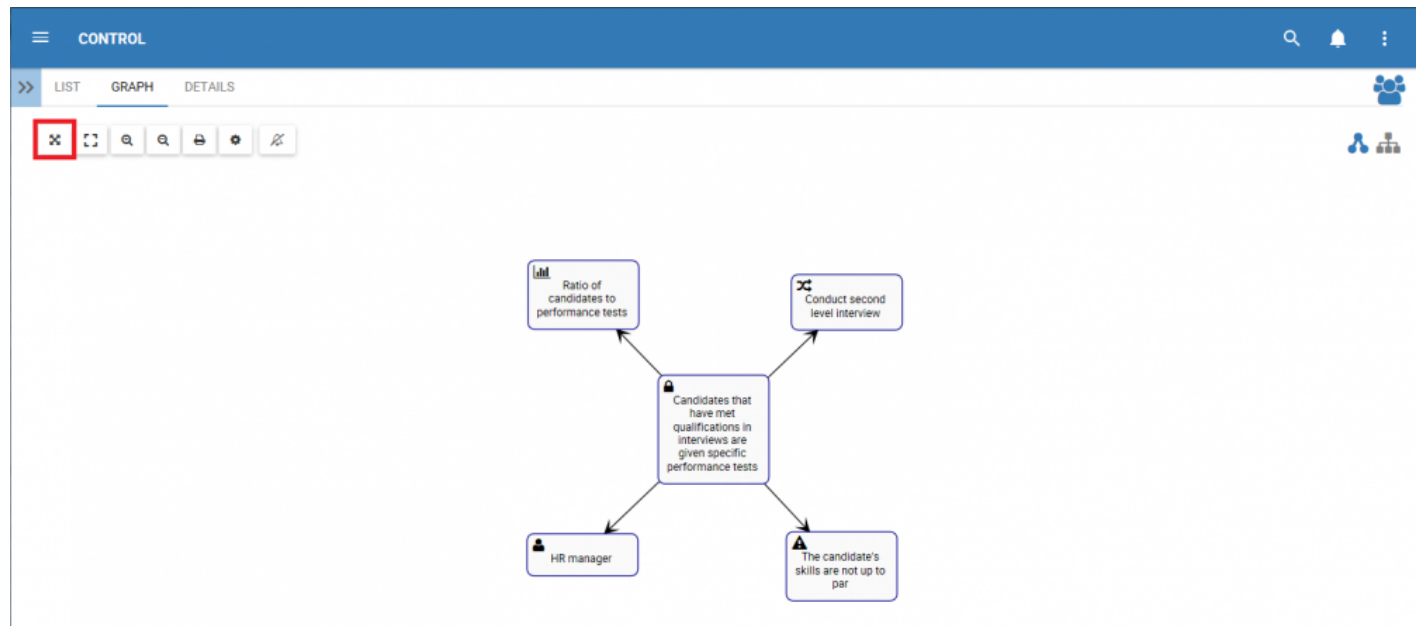
The fit screen function has been implemented to assist users at replacing and re-centering performance graphs.

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

1. Navigate to a Control within the Control Module
2. Click on the [Quick Graph View](#) icon 
3. Alter the Graph (Zoom in, out or shift). Please see [zoom in](#) instructions below for further details.





4. Click on button  and the page will be reset

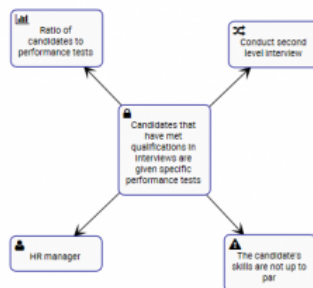
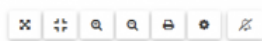



4.9.3.1.1.2 Full Screen

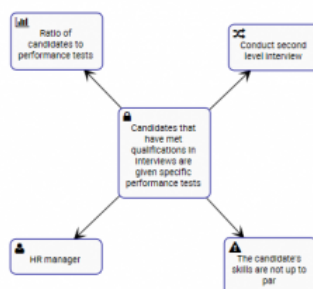
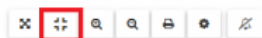
The fit screen function has been implemented to assist users at viewing Controls, utilizing the full screen of a user.

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

1. Navigate to a Control Set within the Control 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  or  on the upper right corner



4.9.3.1.1.3 Zoom in

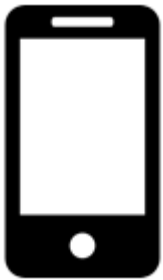
The zoom function has been implemented to assist users in viewing specific items within selected Control items.

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

1. Navigate to a Control Unit within the Control 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.

4.9.3.1.1.4 Zoom Out

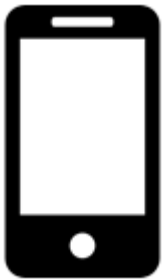
The zoom function has been implemented to assist users in viewing specific items within selected Control items.

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

1. Navigate to a Control Unit within the Control 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

4.9.3.1.1.5 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 Control Unit within the Control 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

Print Settings

General

A

Print Mode:

Single Page

B

Page Layout:

Landscape

C

Page Size:

Letter

Multi page print only

D

Graph Layout:

Left to Right

Close

Print

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 b. Legal	8.5 × 11.0 in (216 × 279 mm) 8.5 × 14.0 in (216 × 356 mm)

	c. A3 d. A4	11.7 × 16.54 in (297 × 420 mm) 8.3 × 11.7 in (210 × 297 mm)
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

Print Settings ×

General

Print Mode:

Single Page

Page Layout:

Landscape

Page Size:

Letter

Multi page print only

Graph Layout:

Left to Right

Close

Print

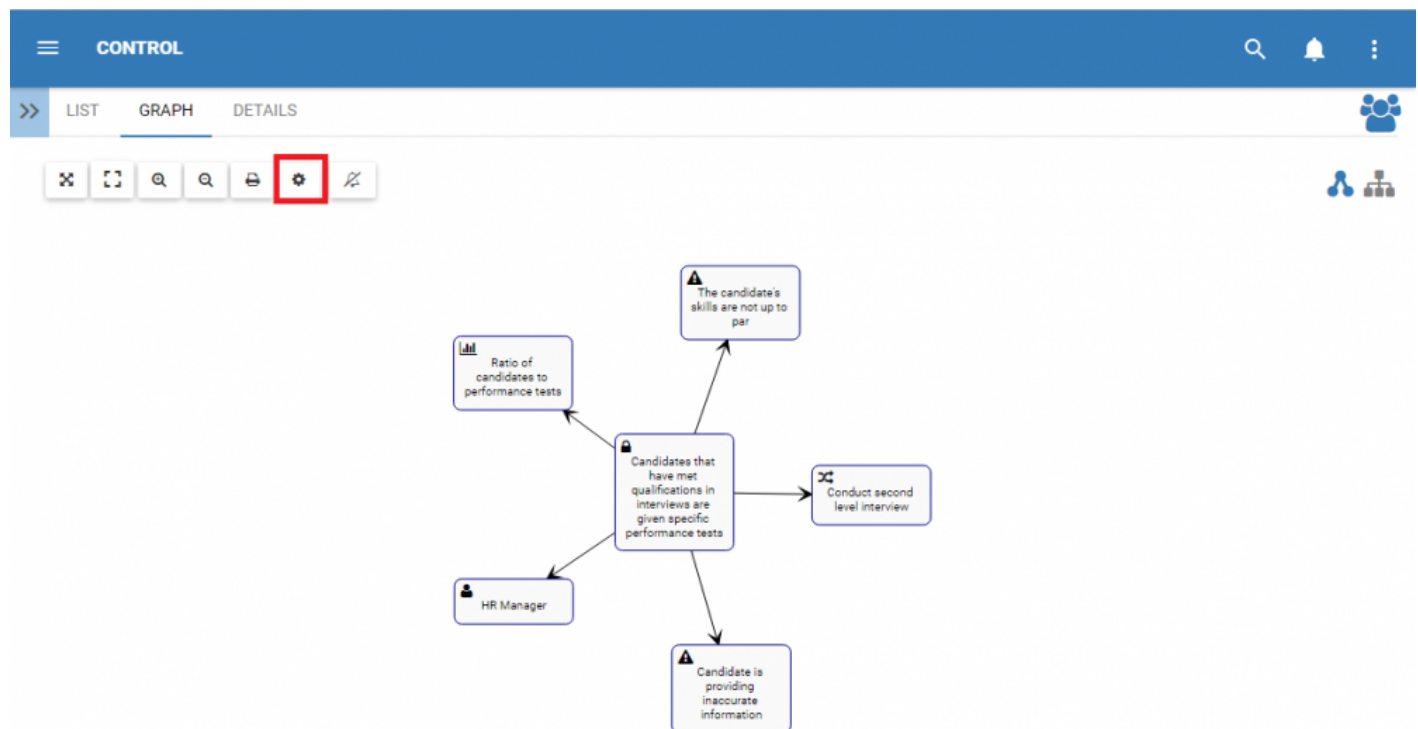
4.9.3.1.1.6 Options

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.

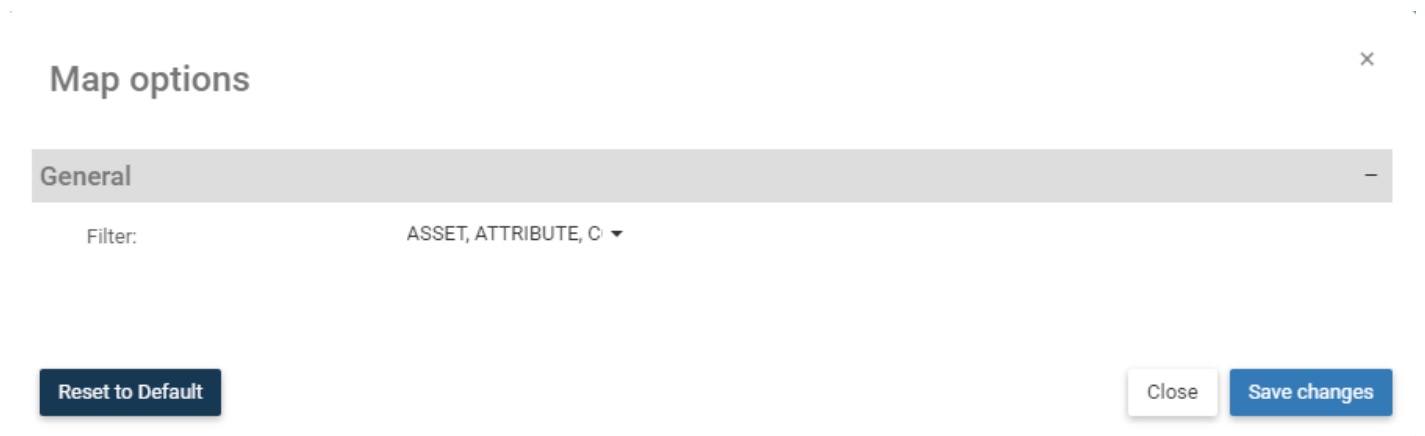
This section will cover navigation to the options button.

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



To customize the graph and use the Filter option, please see the steps below:

1. Select "Options" icon 
2. Navigate cursor to "Asset, Attribute"



3. The following drop-down menu will be generated

Map options ×

General

Filter: ASSET, ATTRIBUTE, C ▼

Select All Deselect All

Reset to Default

Close Save changes

ASSET	✓
ATTRIBUTE	✓
CONTROL	✓
DOCUMENT	✓
END	✓
ENTITY	✓
GATEWAY	✓
INTERMEDIATE	✓
KCI	✓
KPI	✓
KRI	✓
MATERIAL	✓
OBJECTIVE	✓
ORG UNIT	✓
PROCESS	✓
RESOURCE	✓
RISK	✓
ROLE	✓

```
graph TD; A[Candidates that have met qualifications in interviews are given specific performance tests] --> B[The candidate's skills are not up to par]; A --> C[Conduct second level interview]; A --> D[Candidate is providing inaccurate information];
```

4. Select the desired filter and select “Save Changes.” For this example, we will select **Risk** and **Task**

Map options

General

Filter: RISK, TASK

Reset to Default

Select All Deselect All

DOCUMENT

END

ENTITY

GATEWAY

INTERMEDIATE

KCI

KPI

KRI

MATERIAL

OBJECTIVE

ORG UNIT

PROCESS

RESOURCE

RISK ✓

ROLE

RULE

SERVICE

SHORTCUT

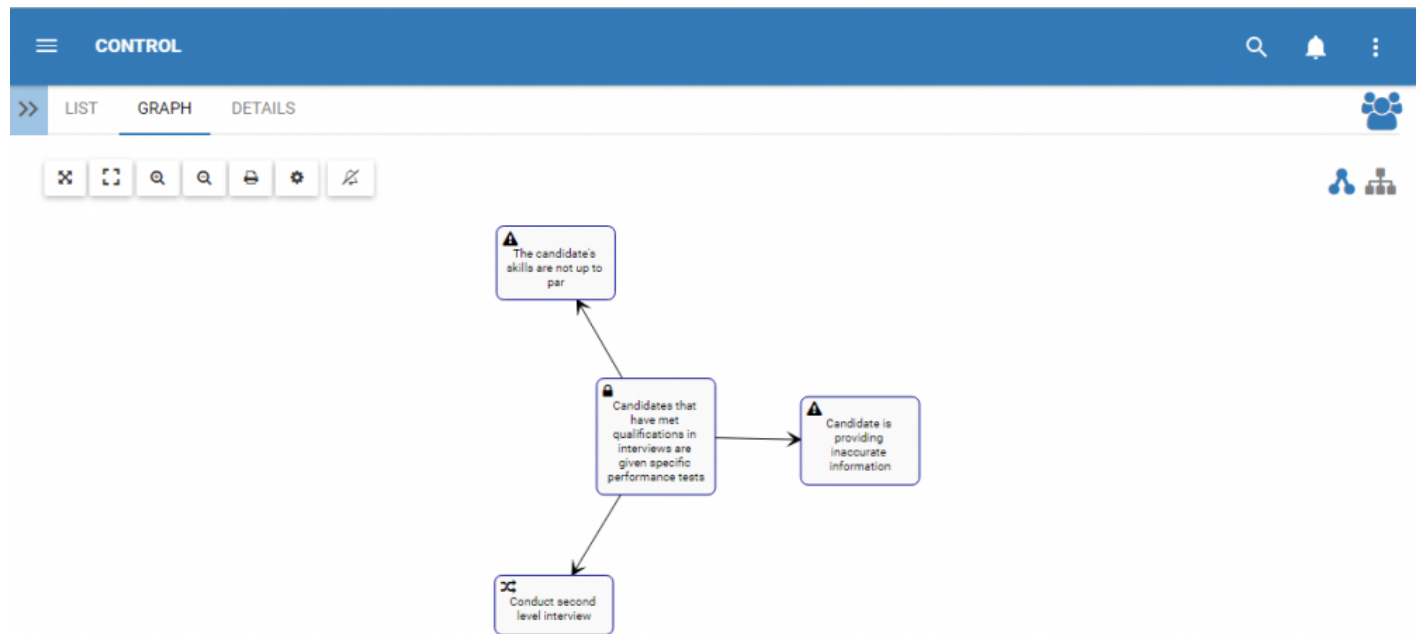
START

TASK ✓


Close

Save changes

6. The following graph will be generating showing only the **Risks** and **Tasks** that are related to the specific **Control**






4.9.3.1.1.7 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.

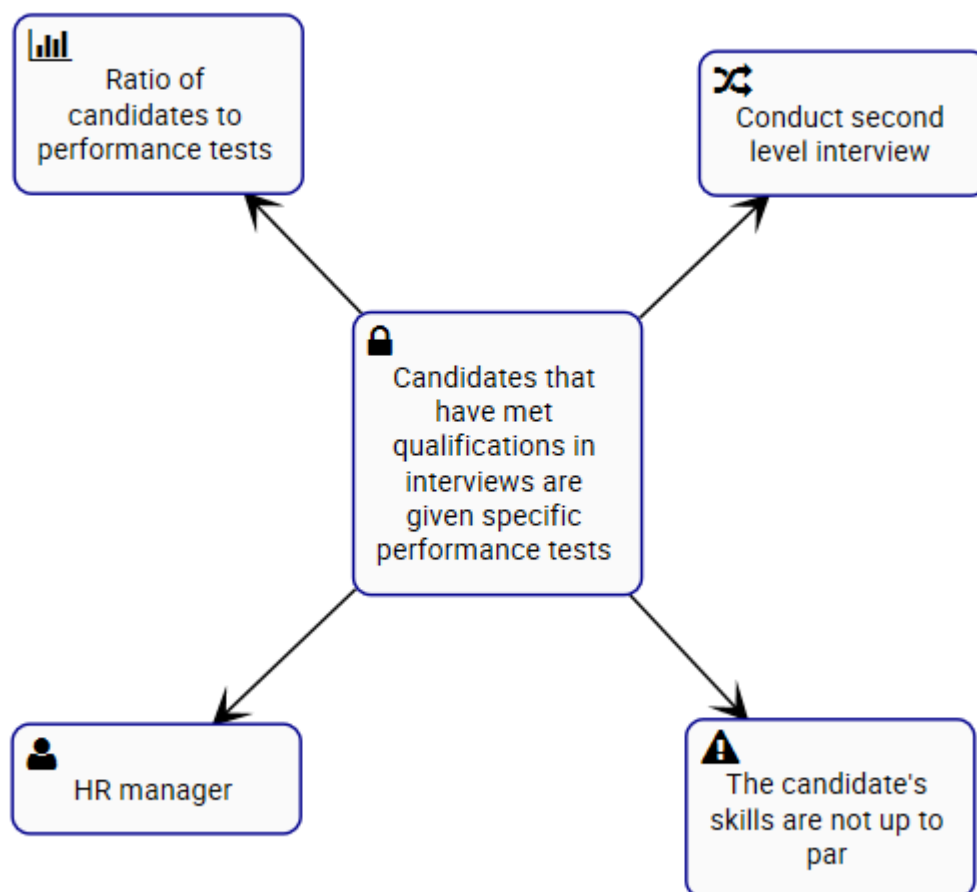
To use the Subscribe button, please see the following instructions.

1. Navigate to an Control Unit within the Control 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.

4.9.3.2 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

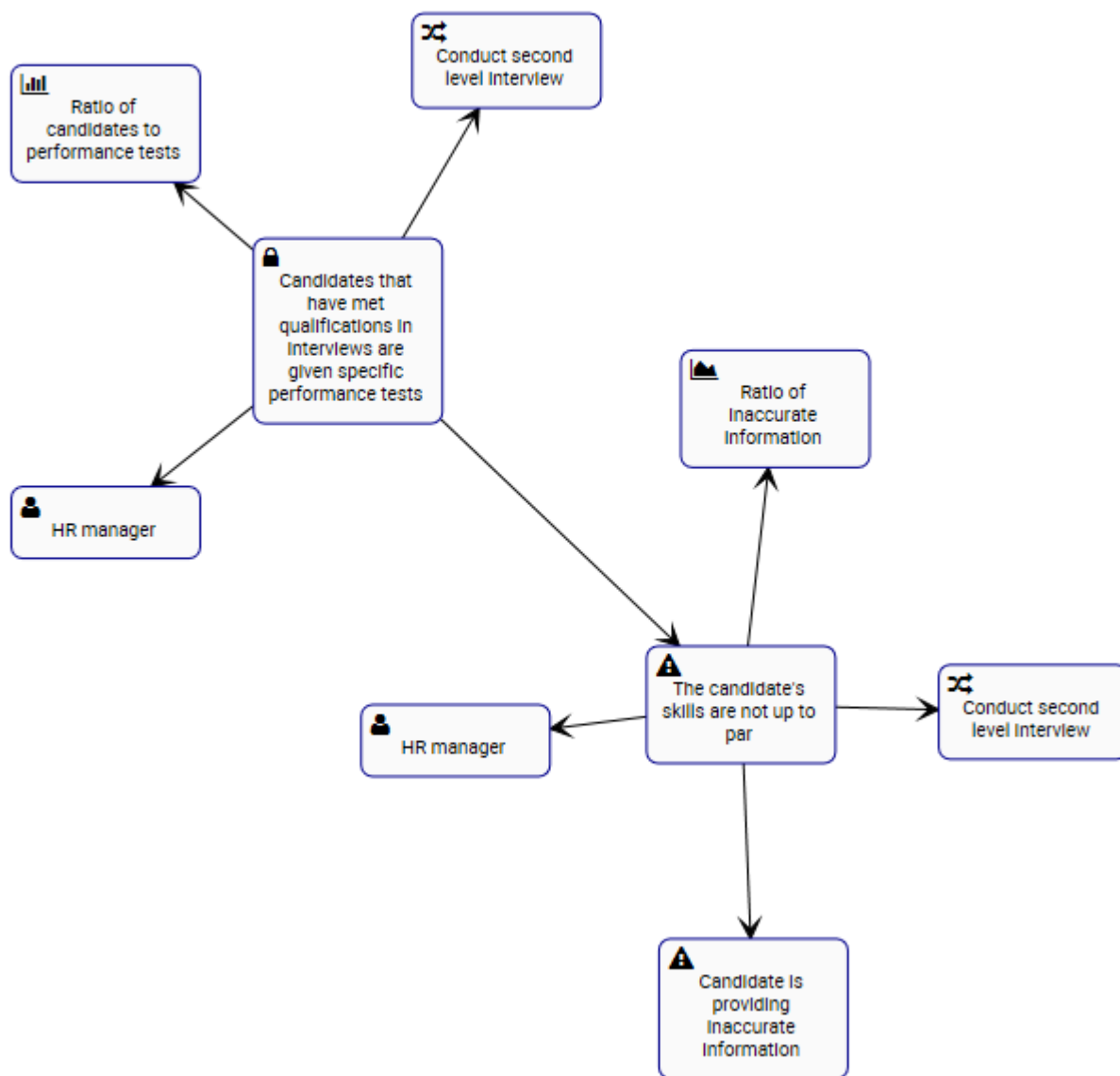


The example features the Impact Graph of the Control "Candidates that have met qualifications in interviews are given specific performance tests." The Control itself is associated to a Role "HR Manager", to a Risk "The Candidate's skills are not up to par," to a Key Control Indicator "Ratio of candidates to performance tests" and to a task "Conduct second level interview."

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.

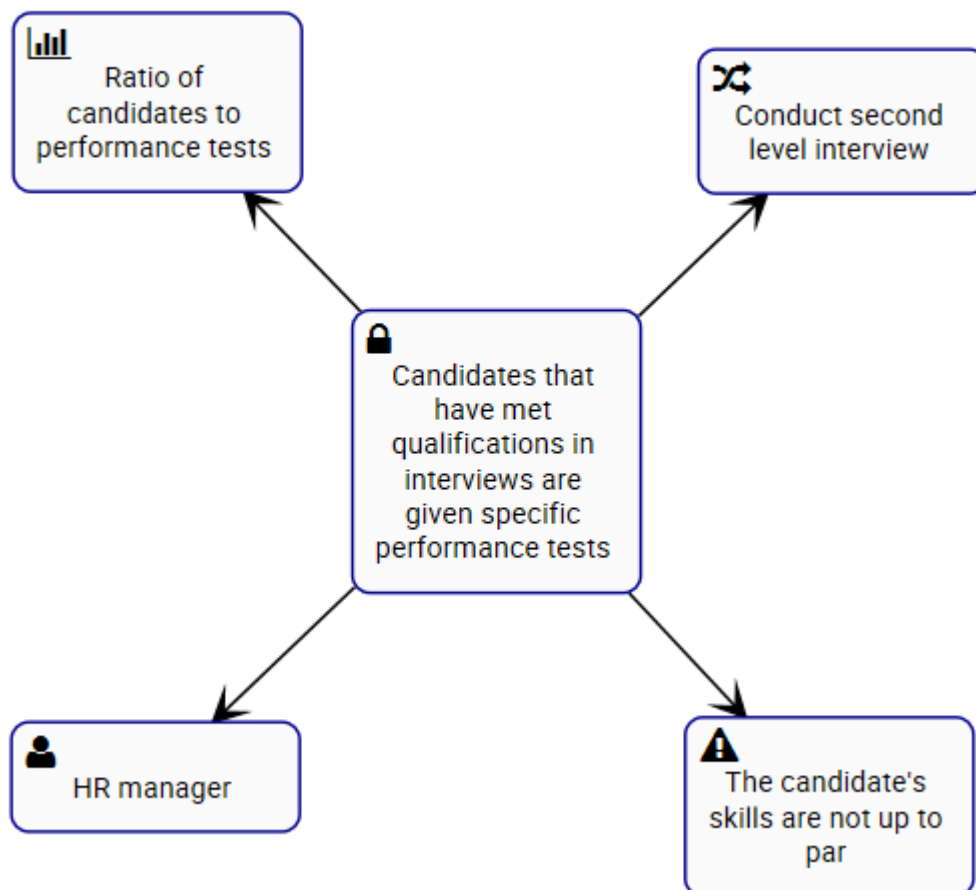


These Impact Graphs can be used to educate business users, to analyze internal business processes and help management optimize activities effectively. Additionally, they help in the preparation of change management plans, allowing managers to map out the effect of any organizational change

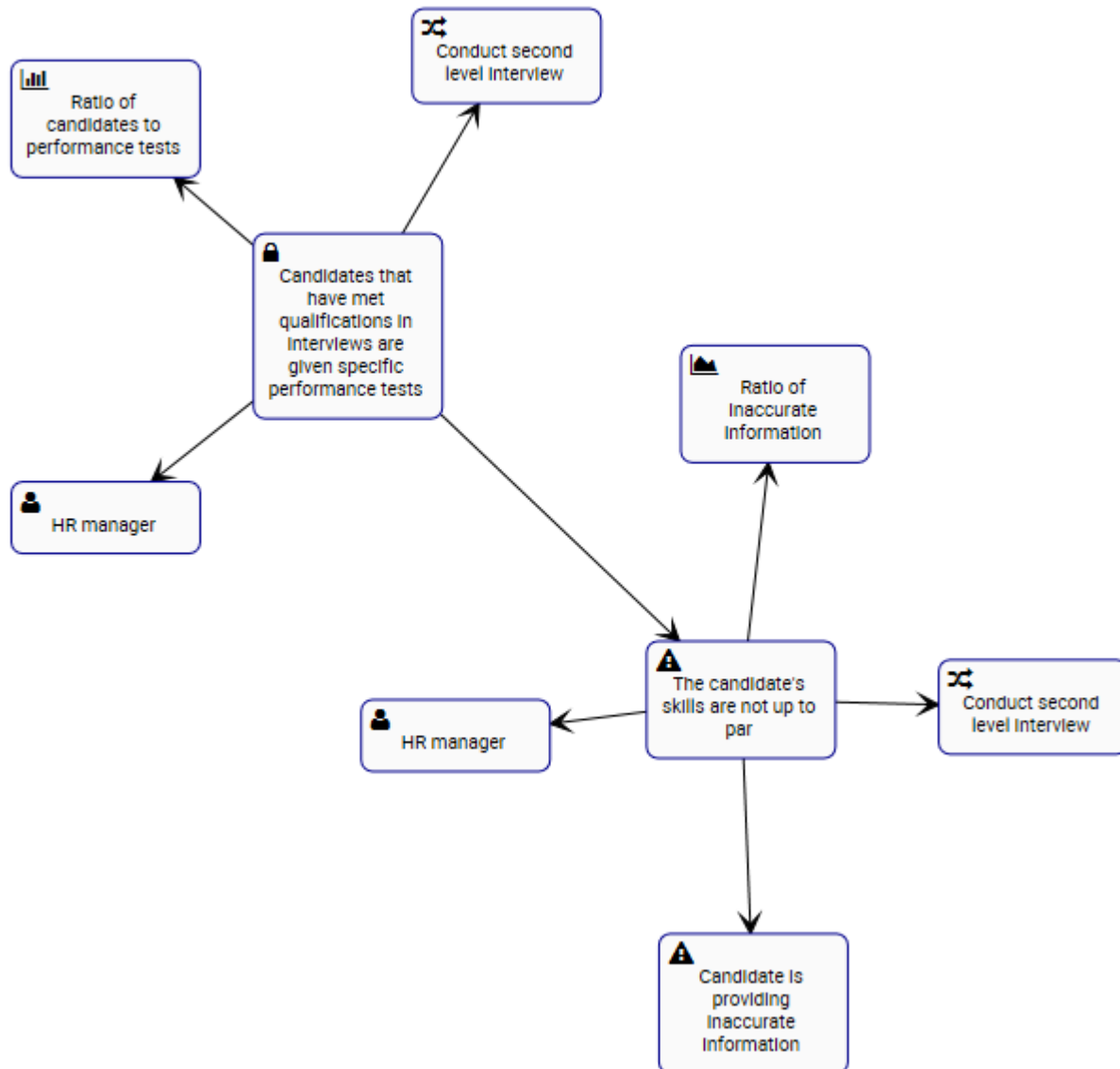
Impact Graph Navigation

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

1. Navigate to a Control within the Control Module
2. Click on the [Quick Graph View](#) icon 
3. You will be navigated to the specific item's Impact Graph



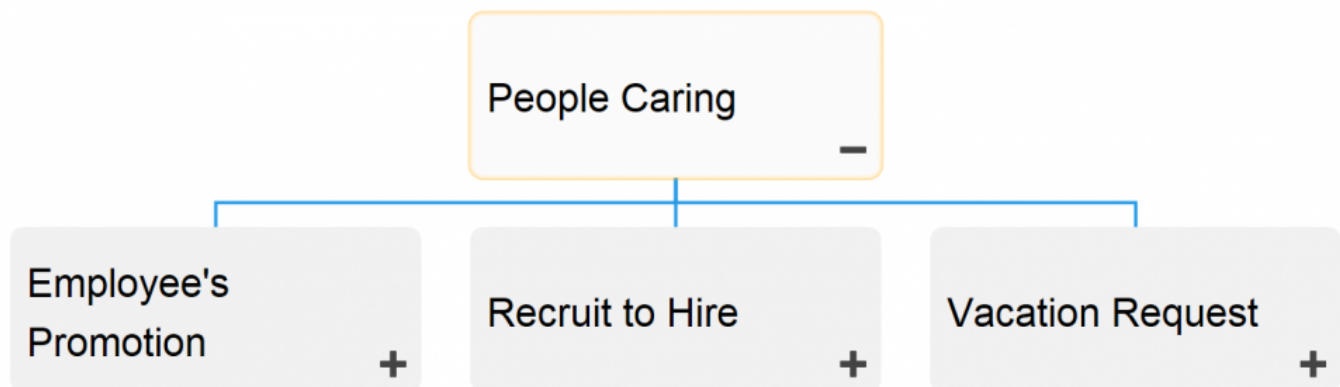
4. (Optional) To further expand the Impact Graph, simply double-click on the item to which you would like to display



4.9.3.3 Hierarchy Graph

Hierarchy Graphs allows users to view the vertical and horizontal hierarchy of Control Sets and Control Folders. This view provides users with a graphical representation of where specific Controls fit within the overall organization. This allows organizational users to understand organizational Controls 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 Control
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 "Control Folders or Control Sets" in List View


3. Select the [Quick Graph View](#) icon  of the desired item

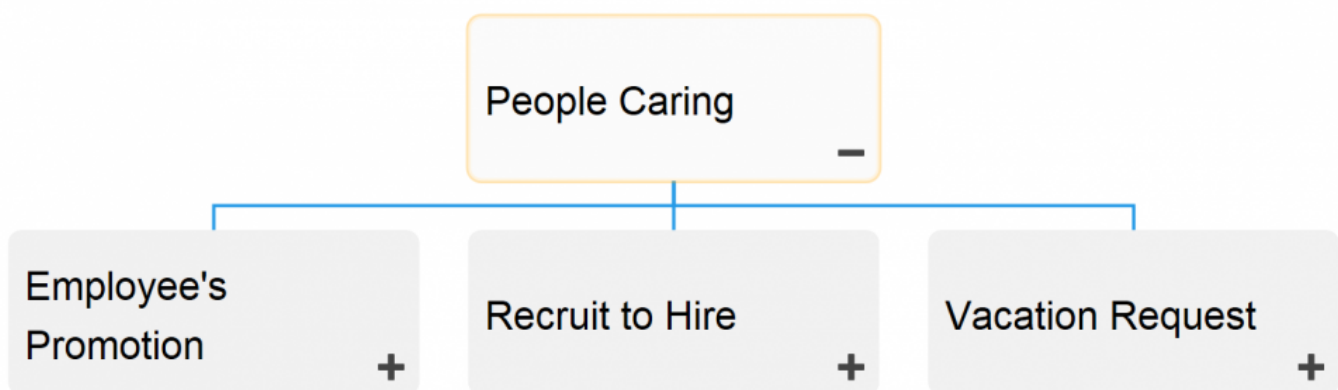
4. Please select the Hierarchy Graph icon 

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


People Caring

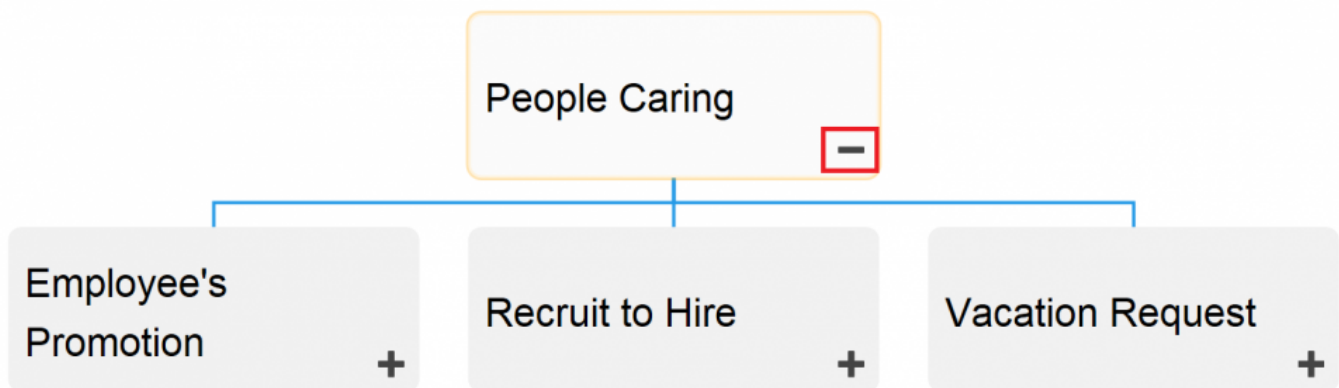


6. To further expand components of the Hierarchy Graph, double click on the  on the objects in the Graph. This will expand the item selected.



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

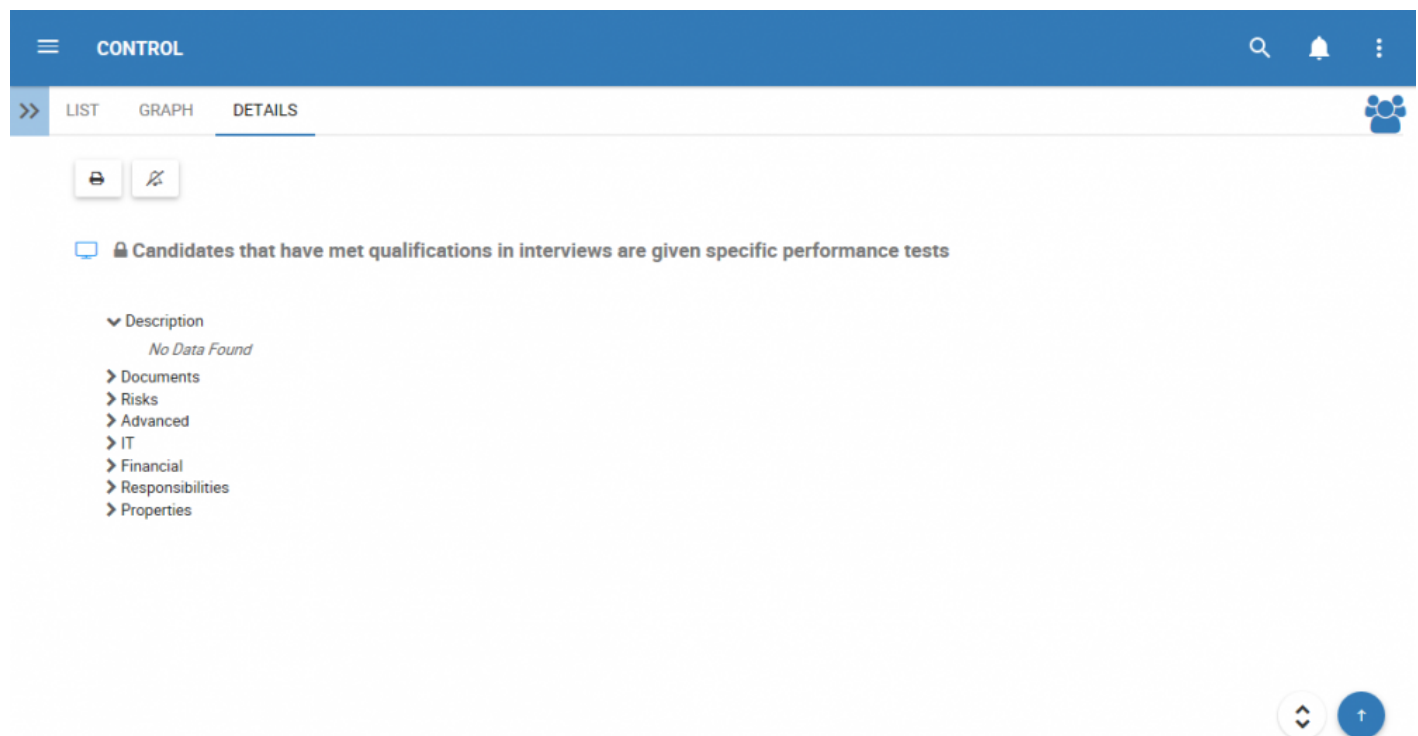
8. To close opened items, double-click on the  icon



4.9.4 Details

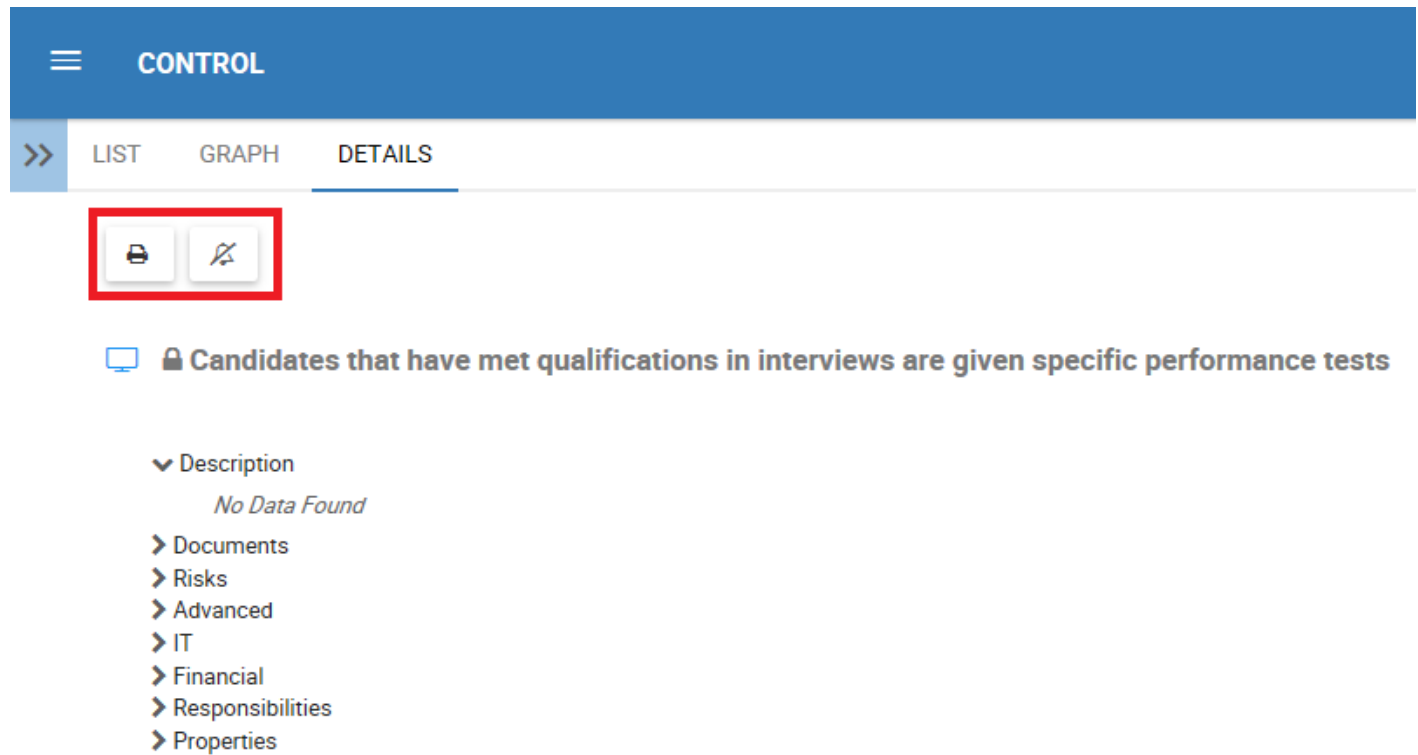
The Description section is where you will find details about the Control folders, Control Sets, or Controls you are observing. This rich text area allows for the display of all additional details that has been uploaded regarding the item in particular. These details provide users with all critical information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

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





4.9.4.1 Navigation

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



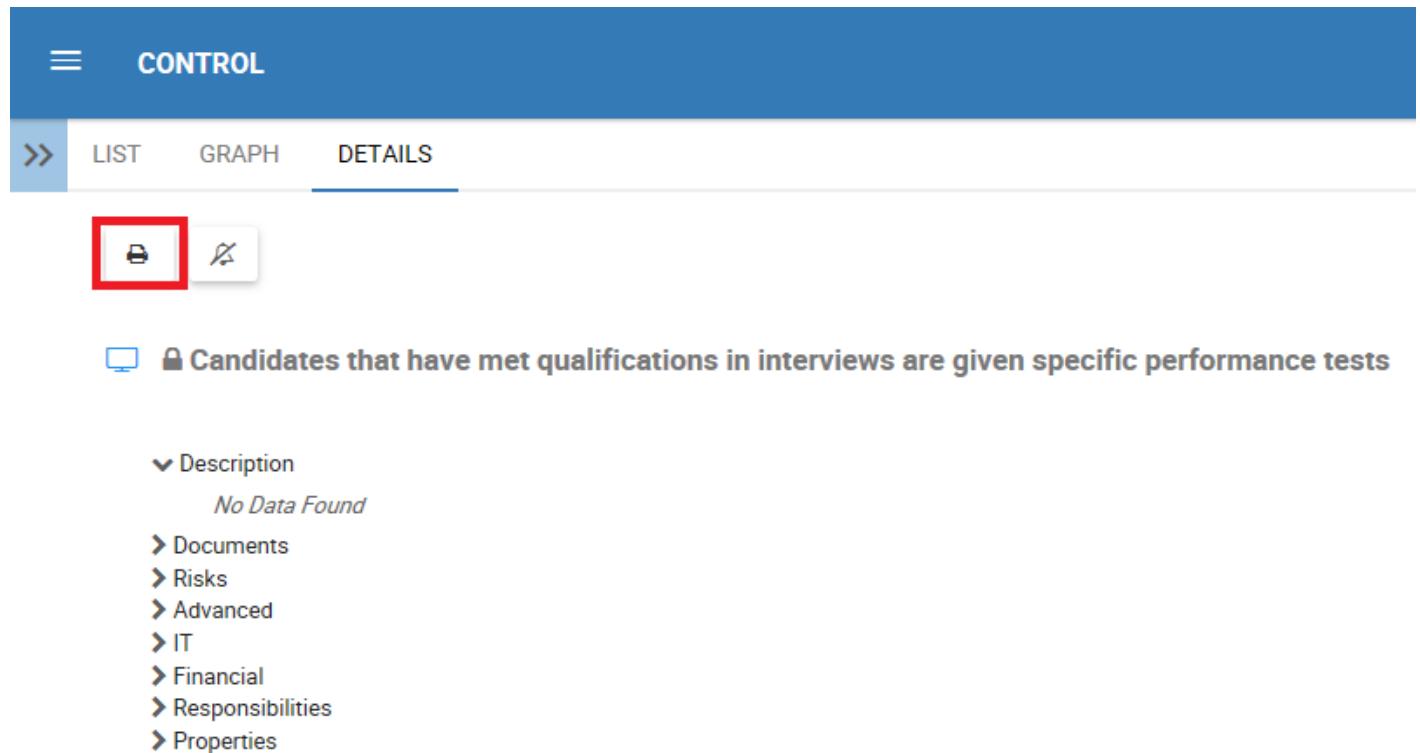
4.9.4.1.1 Toolbar

The toolbar on the Control Module 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 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.



4.9.4.1.1.1 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.



4.9.4.1.1.2 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 rules to simplify and centralize monitoring activities. By subscribing to items, users will receive notifications when rules are altered or optimized, as well when another user collaborates or comments on the Control. Additionally, a widget in the Home Page can be created with all the item the user subscribed to.

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


4.9.4.2 Attributes


Users can find a variety of information about objects within the details section. This information allows users to fully understand all information about a specific Control, Control Set or Control Folder, and provides users with a specific destination that can be used to see and gather all relevant information.

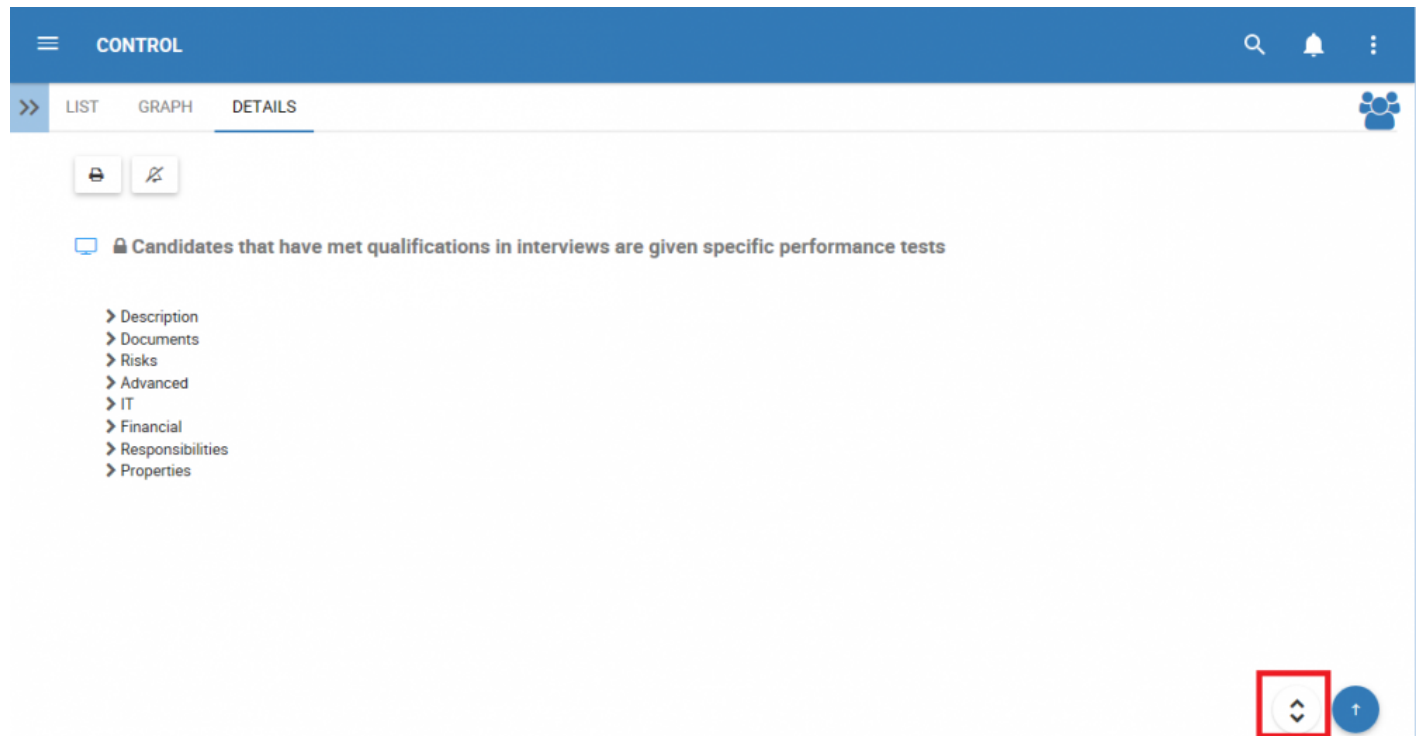
Control Details display the following content

1. [Description](#)
2. [Documents](#)
3. [Risks](#)
4. [Advanced](#)
5. [IT](#)
6. [Financial](#)
7. [Responsibilities](#)
8. [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

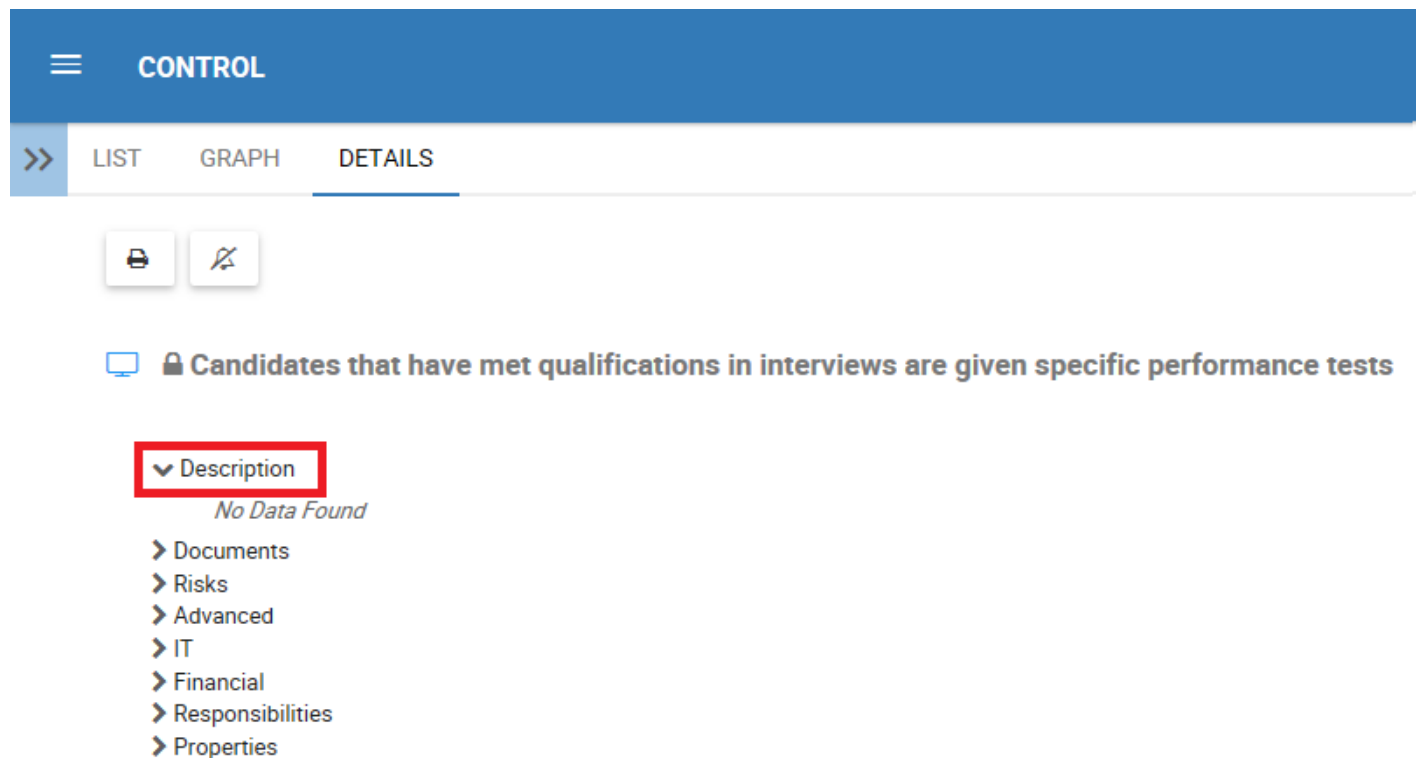


* Selecting different items will result in different information being displayed. The above components specifically relate to the information that will be provided for items.

* 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

4.9.4.2.1 Description



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




The screenshot displays the 'CONTROL' section of the EPC10 WebApp. At the top, there is a blue header bar with a hamburger menu icon and the word 'CONTROL'. Below this, a white navigation bar contains three tabs: 'LIST', 'GRAPH', and 'DETAILS'. The 'DETAILS' tab is currently selected and underlined. Below the navigation bar, there are two icons: a printer icon and a share icon. A search bar is present, containing the text 'Candidates that have met qualifications in interviews are given specific performance tests'. Below the search bar, there is a red-bordered box containing a dropdown menu labeled 'Description'. Below this box, the text 'No Data Found' is displayed. A list of categories is shown below the search bar, each preceded by a right-pointing chevron: Documents, Risks, Advanced, IT, Financial, Responsibilities, and Properties.

CONTROL

>> LIST GRAPH DETAILS

 **Candidates that have met qualifications in interviews are given specific performance tests**

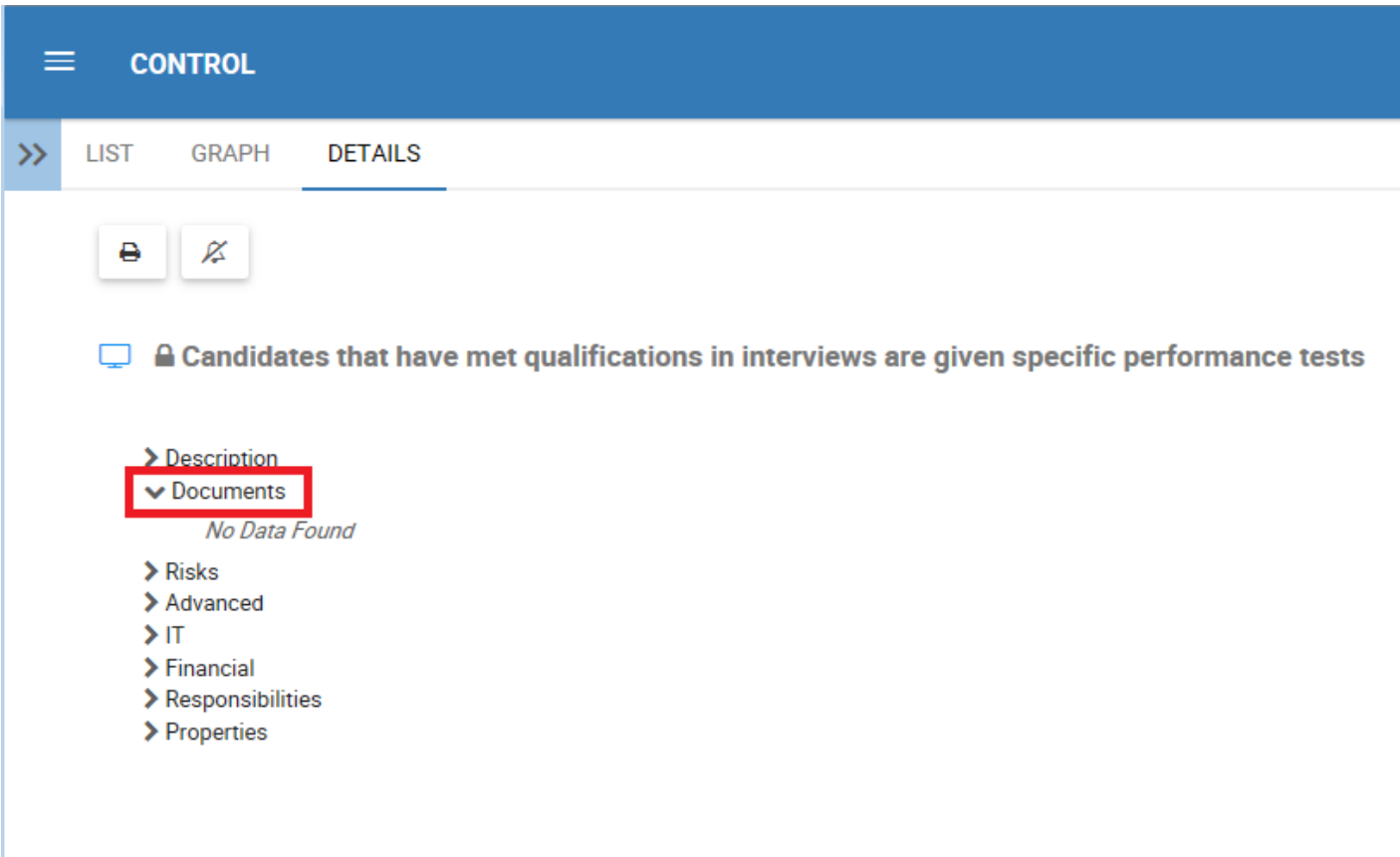
▼ Description

No Data Found

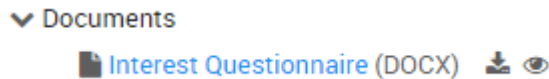
- > Documents
- > Risks
- > Advanced
- > IT
- > Financial
- > Responsibilities
- > Properties

4.9.4.2.2 Documents


This section lists all documents that have tied to the Rule 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 • 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
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](#) .


4.9.4.2.3 Risks



The Risk section displays any Risk that is related to the specific Control you are viewing.


The screenshot shows the EPC10 WebApp interface. At the top, there is a blue header bar with a hamburger menu icon and the word 'CONTROL'. Below this is a white bar with navigation tabs: '>>', 'LIST', 'GRAPH', and 'DETAILS'. The 'DETAILS' tab is selected. Below the tabs are two icons: a printer icon and a pencil icon. The main content area displays a control item: a laptop icon followed by the text 'Candidates that have met qualifications in interviews are given specific performance tests'. Below this, there is a list of expandable sections: 'Description', 'Documents', 'Risks' (which is expanded and highlighted with a red box), 'Advanced', 'IT', 'Financial', 'Responsibilities', and 'Properties'. Under the 'Risks' section, two risks are listed: 'Candidate is providing inaccurate information / Residual Score : 10' and 'The candidate's skills are not up to par / Residual Score : 91'. The risk names are highlighted in blue.

Users can navigate directly to the Risks that are featured in this section. Users can click on the specific item's name highlighted in [blue](#), and will be redirected to the item's details page. The residual score of each risk will be displayed next to the Risk's name.

 **CONTROL**

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


 


 **Candidates that have met qualifications in interviews are given specific performance tests**

> Description

> Documents

▼ Risks

 Candidate is providing inaccurate information / Residual Score : 10

 The candidate's skills are not up to par / Residual Score : 91

> Advanced

> IT

> Financial

> Responsibilities

> Properties

4.9.4.2.4 Advanced

The Advance section displays advanced functionalities to analyze the Control.

It displays if there is a Key Control or not, if the Control is Preventive or Detective, if the Control is done Manually or by a Computer, the Control's Frequency, and the Control Activity Type.

The Advanced section also displays a COSO Components table with its different categories. When some components are highlighted for a specific control, it means the control is under that category. Users can use the COSO Components to organize and categorize an organization's internal controls; it can support the achievement of an entity's mission, strategies and related business objectives.

≡

CONTROL

- >>
- LIST
- GRAPH
- DETAILS

**🔒 Candidates that have met qualifications in interviews are given specific performance tests**

- > Description
- > Documents
- > Risks
- ▼ Advanced

Key Control: Yes

Preventive/ Detective: Preventive

Manual/Computer:

Frequency:

Control Activity Type:

COSO Components

Internal Environment
Object Settings
Event Identification
Risk Assessment
Risk Response
Control Activities
Information & Communication
Monitoring

- > IT
- > Financial
- > Responsibilities
- > Properties

4.9.4.2.5 IT

The IT section displays if there is an IT Control, which type of IT Control, and which types of IT Assertions.

The screenshot shows the EPC10 WebApp interface. At the top, there is a blue header bar with a hamburger menu icon and the word "CONTROL". Below this is a white bar with a double arrow icon and three tabs: "LIST", "GRAPH", and "DETAILS". The "DETAILS" tab is selected. Below the tabs are two icons: a printer icon and a pencil icon. The main content area displays a blue header with a monitor icon and the text "Candidates that have met qualifications in interviews are given specific performance tests". Below this is a list of expandable sections: "Description", "Documents", "Risks", "Advanced", "IT", "Financial", "Responsibilities", and "Properties". The "IT" section is expanded, showing "IT Control: Yes", "IT Type:", "IT Assertions:", and a list of assertions: "1. Accuracy" and "2. Validity".

≡ CONTROL

>> LIST GRAPH DETAILS


🖨️ ✎️


🖥️ 🛡️ Candidates that have met qualifications in interviews are given specific performance tests



- > Description
- > Documents
- > Risks
- > Advanced
- ▼ IT
 - IT Control: Yes
 - IT Type:
 - IT Assertions:
 1. Accuracy
 2. Validity
- > Financial
- > Responsibilities
- > Properties


4.9.4.2.6 Financial

The Financial section displays the Financial Assertions associated to the Control and which Financial Statements are impacted by the Control.

 **CONTROL**

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

 **🔒 Candidates that have met qualifications in interviews are given specific performance tests**

➤ Description

➤ Documents

➤ Risks

➤ Advanced

➤ IT

▼ **Financial**

Financial Assertions:

1. Completeness

Financial Statements Impacted:

1. Notes to Financial Statement

➤ Responsibilities

➤ Properties

4.9.4.2.7 Responsibilities

The Responsibilities section displays the roles, resources and/or assets that are responsible for the Control 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.

The screenshot shows the EPC10 WebApp interface. At the top, there is a blue header bar with a hamburger menu icon and the word 'CONTROL'. Below the header, there is a navigation bar with three tabs: 'LIST', 'GRAPH', and 'DETAILS'. The 'DETAILS' tab is currently selected. Below the navigation bar, there are two icons: a printer icon and a refresh icon. Below the icons, there is a section titled 'Candidates that have met qualifications in interviews are given specific performance tests'. Below this section, there is a list of categories: 'Description', 'Documents', 'Risks', 'Advanced', 'IT', 'Financial', 'Responsibilities', 'Roles', and 'Properties'. The 'Responsibilities' category is highlighted with a red box. Below 'Responsibilities', there is a sub-section titled 'Roles' which contains a list of roles, including 'HR Manager [R]'.

4.9.4.2.8 Properties

The properties section provides users with additional key information about items. The properties section is broken down into two 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 screenshot displays the EPC10 WebApp interface. At the top, there is a blue header bar with a hamburger menu icon and the word 'CONTROL'. Below this is a white navigation bar with a double arrow icon and three tabs: 'LIST', 'GRAPH', and 'DETAILS'. The 'DETAILS' tab is currently selected. Below the navigation bar, there are two icons: a printer icon and a share icon. A blue notification banner with a computer icon and a lock icon reads: 'Candidates that have met qualifications in interviews are given specific performance tests'. Below the banner is a list of expandable sections: 'Description', 'Documents', 'Risks', 'Advanced', 'IT', 'Financial', 'Responsibilities', and 'Properties'. The 'Properties' section is highlighted with a red box and is currently expanded, showing two sub-sections: 'Version' and 'Analysis'. The 'Version' section displays 'Version Number: 1.01' and 'Last Modified: a month ago'. The 'Analysis' section displays 'No Data Found'.

≡ CONTROL

>> LIST GRAPH DETAILS

🖨️ 🔗

💻 🔒 Candidates that have met qualifications in interviews are given specific performance tests

- > Description
- > Documents
- > Risks
- > Advanced
- > IT
- > Financial
- > Responsibilities
- ▼ Properties
 - ▼ Version
 - Version Number: 1.01
 - Last Modified: a month ago
 - ▼ Analysis
 - No Data Found

4.10 Rule

The EPC allows users to view and monitor business rules that control business processes. Business rules are used as governance tools for organizations to build a structure that allows businesses to operate on a daily basis.

Business rules are also put in place to keep a competitive advantage or to follow regulatory requirements.

Mapping Rules allows users to visually view why Rules are put into place, and how they affect and influence the overall organization. Viewing the Rule Module on the Web App provides users with up-to-date information enabling them to know which processes and roles are affected by the rules.

Rules can be set to a process and be viewed directly on the process map. The EPC also provides 2 types of graphs for users to view Rules:

1. [Impact Graphs](#)
2. [Hierarchy Graphs](#)

These views have various view-specific options that the user can define to display the best way to view Rules.

4.10.1 Module Overview

EPC's Rule Module allows users to view personal, role and company rules. The EPC provides 3 different dimensions, allowing users to properly view and understand their organizational structure.

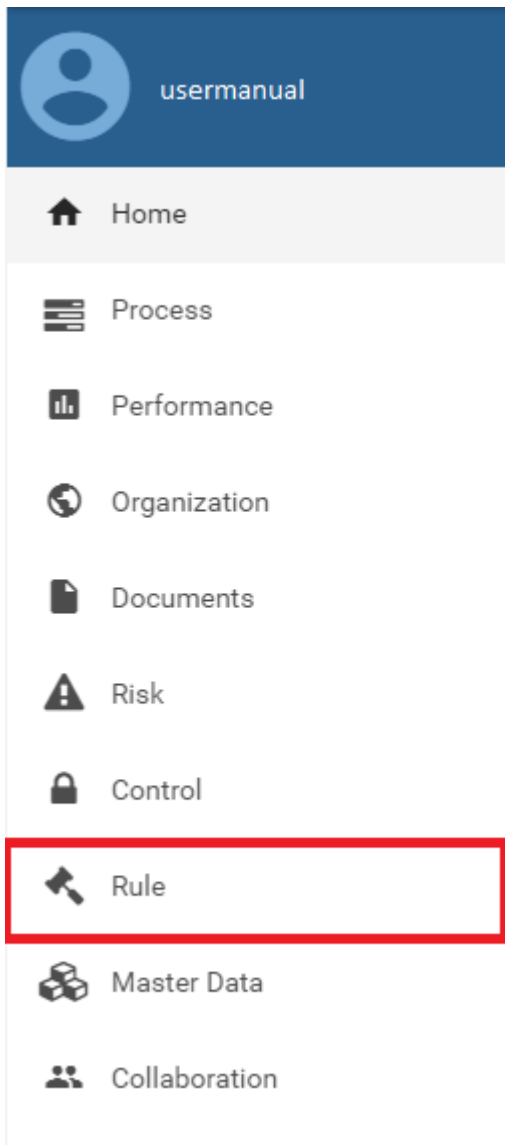
Dimension	Details
1. List	Provides view of all risk sets you have access to
2. Graph	Provides the visual representation of the risk set, their features and links (Impact and Hierarchy Graphs)
3. Details	Provides additional key information regarding specific risk details

How to access the Rule module:

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



2. Click on **Rule**



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

4.10.2 List

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

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
Role	Whether or not there are Roles directly associated with the item in question
Documents	Whether or not there are Documents attached for 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
Modified Date	The last date that the object in question was modified
Status	View the status of the item in question when Show Latest mode is on



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 **Rule**

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

Name	Role	Documents	Description	My RASCI-VS	Type	Modified Date
People Caring					Rule Set	08-Sep-2017
Rivera Enterprise					Rule Set	08-Sep-2017

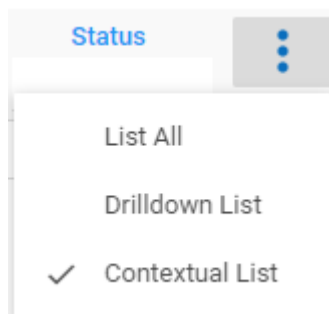
To simplify Rule viewing; users **are not** greeted with all major Rules that they are associated too. Users are greeted with the list of Rule Sets, the highest level of Rule Classification in the EPC. However users can display these risks within the **List View**. Please see the **Optional** steps below:



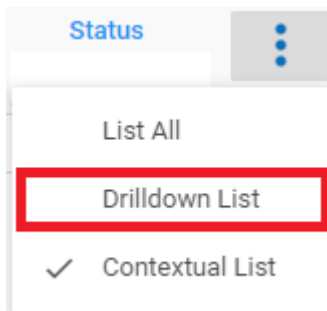
These steps are only required if a user is using an account or browser for the first time. As noted above, list preferences will be saved by user and browser to simplify navigation.

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-refresh the page

A screenshot of the 'RULE' page in a web application. The page has a blue header with the title 'RULE' and navigation icons. Below the header, there are tabs for 'LIST', 'GRAPH', and 'DETAILS', with 'LIST' being the active tab. The main content area displays a table of rules. The table has columns for 'Name', 'Role', 'Documents', 'Description', 'My RASCI-VS', 'Type', and 'Modified Date'. Each row represents a rule, with a star icon in the 'Name' column and a document icon in the 'Documents' column. The 'Modified Date' column shows dates from 08-Sep-2017.

★	Name ▲	Role	Documents	Description	My RASCI-VS	Type	Modified Date
☆	A background check must be implemented for each candidate.	1			R	Rule	08-Sep-2017
☆	A candidate must be interviewed at least twice before they can be hired.	1			R	Rule	08-Sep-2017
☆	All interviews must be conducted by at least two interviewers	1			R	Rule	08-Sep-2017
☆	IT candidates must be ITIL Foundation certified.	1			R	Rule	08-Sep-2017
☆	People Caring					Rule Set	08-Sep-2017
☆	Performance driven					Rule Folder	08-Sep-2017
☆	Recruit to Hire					Rule Folder	08-Sep-2017
☆	Rivera Enterprise					Rule Set	08-Sep-2017
☆	The manager must be present at every meeting	1			R	Rule	08-Sep-2017

4.10.2.1 Sorting

Sorting allows users to classify rules 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 Rule in List View:

Filter	Details
Favorite	Allows users to sort rules by favorites vs. non-favorites
Name	Allows users to sort rules by a key number or word within document name
Type	Allows users to sort rules by their specific type
Modified Date	Allows users to sort rules chronologically by date last modified

How to use “Sorting” Function

1. Navigate to the Rule 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.

RULE							
<div> <div> <div></div> <div>LIST</div> <div>GRAPH</div> <div>DETAILS</div> </div> </div>							
	Name	Role	Documents	Description	My RASCI-VS	Type	Modified Date
		A background check must be implemented for each candidate.	1		R	Rule	08-Sep-2017
		A candidate must be interviewed at least twice before they can be ...	1		R	Rule	08-Sep-2017
		All interviews must be conducted by at least two interviewers	1		R	Rule	08-Sep-2017
		IT candidates must be ITIL Foundation certified.	1		R	Rule	08-Sep-2017
		People Caring				Rule Set	08-Sep-2017
		Performance driven				Rule Folder	08-Sep-2017
		Recruit to Hire				Rule Folder	08-Sep-2017
		Rivera Enterprise				Rule Set	08-Sep-2017
		The manager must be present at every meeting	1		R	Rule	08-Sep-2017

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

RULE							
>> LIST GRAPH DETAILS							
	Name	Role	Documents	Description	My RASCI-VS	Type	Modified Date
☆	The manager must be present at every meeting	1			R	Rule	08-Sep-2017
☆	Rivera Enterprise					Rule Set	08-Sep-2017
☆	Recruit to Hire					Rule Folder	08-Sep-2017
☆	Performance driven					Rule Folder	08-Sep-2017
☆	People Caring					Rule Set	08-Sep-2017
☆	IT candidates must be ITIL, Foundation certified.	1			R	Rule	08-Sep-2017
☆	All interviews must be conducted by at least two interviewers	1			R	Rule	08-Sep-2017
☆	A candidate must be interviewed at least twice before they can be ...	1			R	Rule	08-Sep-2017
☆	A background check must be implemented for each candidate.	1			R	Rule	08-Sep-2017

4.10.2.2 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 Rule 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 documents Not-Empty – The object has at least one document
Description	Empty – The object has no description Not-Empty – The object has at least one description
My RASCI-VS	Responsible Accountable Support Consulted Informed Verifier Signatory
Type	Rule Set Rule Folder Rule
Modified Date	The specific dates that things have been modified by
Status	In Progress Published Sent for a review Approved Rejected

The Filtering section will cover the following:

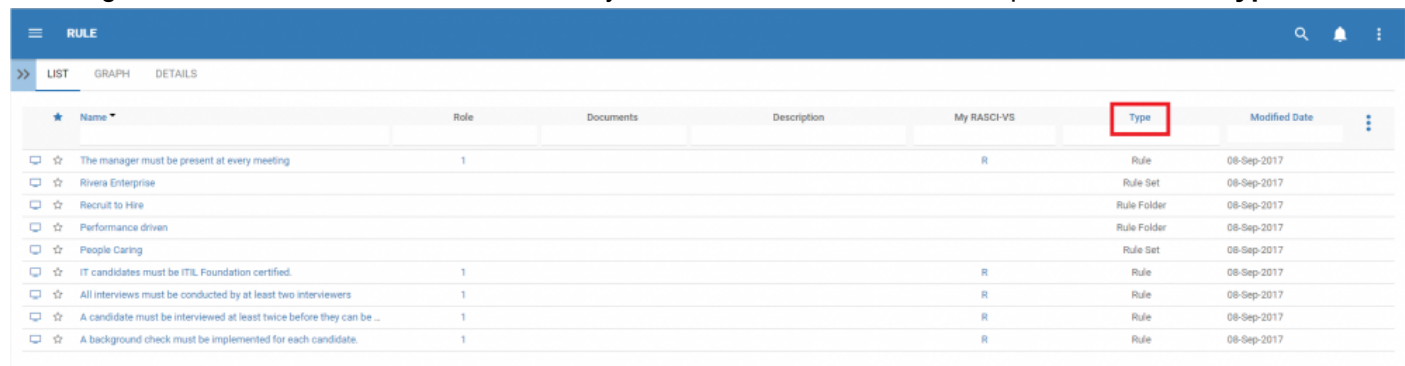
1. [How to Add Filters](#)
2. [How to Remove Filters](#)
3. [How to Combine Filters](#)

4.10.2.2.1 Add Filter

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

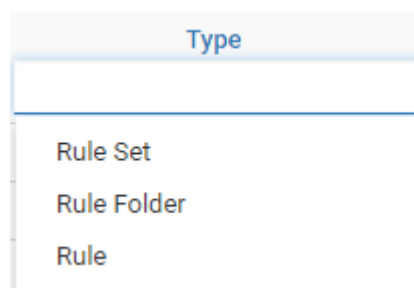
How to Add Filter

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



★	Name ▼	Role	Documents	Description	My RASCI-VS	Type	Modified Date
☆	The manager must be present at every meeting	1			R	Rule	08-Sep-2017
☆	Rivera Enterprise					Rule Set	08-Sep-2017
☆	Recruit to Hire					Rule Folder	08-Sep-2017
☆	Performance driven					Rule Folder	08-Sep-2017
☆	People Caring					Rule Set	08-Sep-2017
☆	IT candidates must be ITIL Foundation certified.	1			R	Rule	08-Sep-2017
☆	All interviews must be conducted by at least two interviewers	1			R	Rule	08-Sep-2017
☆	A candidate must be interviewed at least twice before they can be ...	1			R	Rule	08-Sep-2017
☆	A background check must be implemented for each candidate.	1			R	Rule	08-Sep-2017

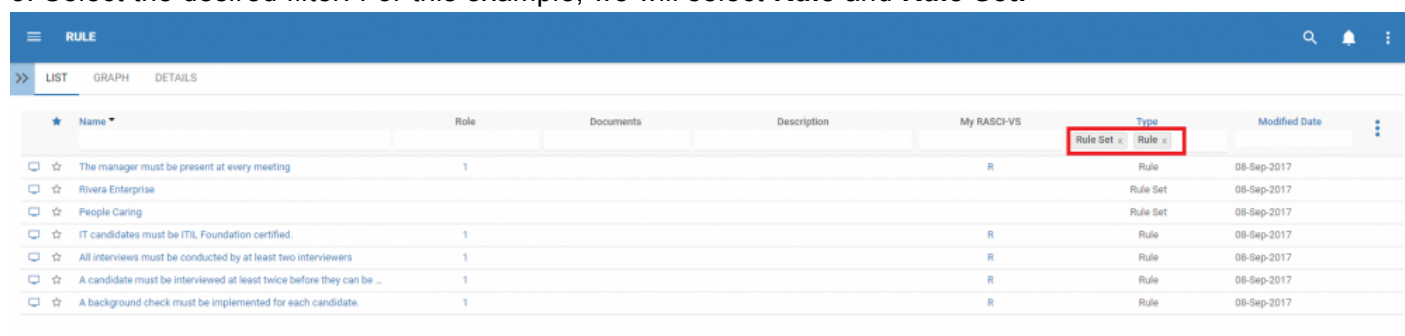
2. Select the box, which will generate a drop down menu



Type

- Rule Set
- Rule Folder
- Rule

3. Select the desired filter. For this example, we will select **Rule** and **Rule Set**.



★	Name ▼	Role	Documents	Description	My RASCI-VS	Type	Modified Date
☆	The manager must be present at every meeting	1			R	Rule Set x Rule x	08-Sep-2017
☆	Rivera Enterprise					Rule Set	08-Sep-2017
☆	People Caring					Rule Set	08-Sep-2017
☆	IT candidates must be ITIL Foundation certified.	1			R	Rule	08-Sep-2017
☆	All interviews must be conducted by at least two interviewers	1			R	Rule	08-Sep-2017
☆	A candidate must be interviewed at least twice before they can be ...	1			R	Rule	08-Sep-2017
☆	A background check must be implemented for each candidate.	1			R	Rule	08-Sep-2017

4.10.2.2.2 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.

RULE							
>> LIST GRAPH DETAILS							
★ Name	Role	Documents	Description	My RASCI-VS	Type	Modified Date	
					Rule Set x	Rule	
☆ The manager must be present at every meeting	1			R	Rule	08-Sep-2017	
☆ Rivera Enterprise					Rule Set	08-Sep-2017	
☆ People Caring					Rule Set	08-Sep-2017	
☆ IT candidates must be ITIL Foundation certified.	1			R	Rule	08-Sep-2017	
☆ All interviews must be conducted by at least two interviewers	1			R	Rule	08-Sep-2017	
☆ A candidate must be interviewed at least twice before they can be ...	1			R	Rule	08-Sep-2017	
☆ A background check must be implemented for each candidate.	1			R	Rule	08-Sep-2017	


4.10.2.2.3 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](#).

4.10.2.3 Quick Graph View

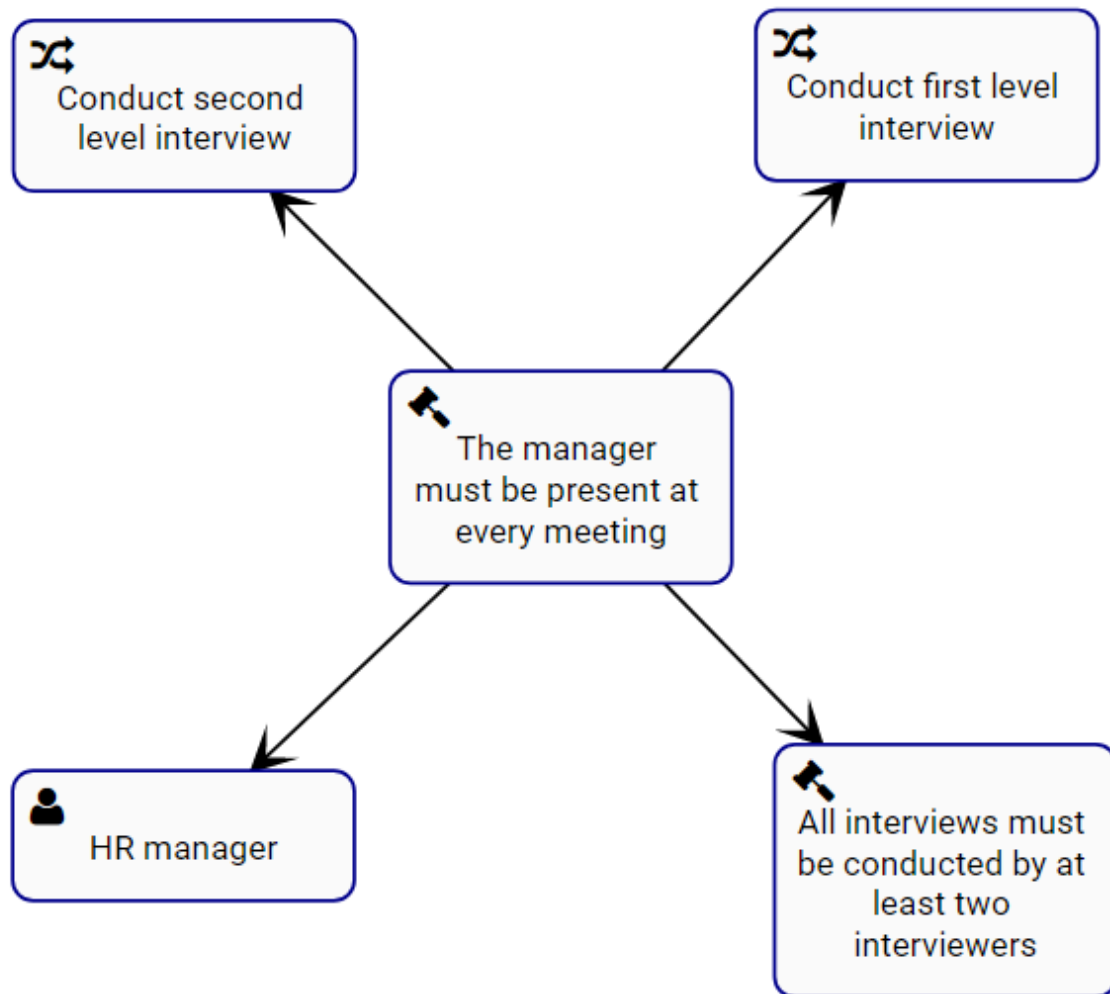
Quick Graph View is a feature of the EPC Web App that allows users to immediately view rules in a graph mode. While Graph's will be further explained below, the Quick Graph View allows users to quickly navigate to a Graph from "List View".

Please see the instructions below:

1. Navigate to Rule 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.

RULE							
<div> <div>>></div> <div>LIST</div> <div>GRAPH</div> <div>DETAILS</div> </div>							
★	Name	Role	Documents	Description	My RASCI-VS	Type	Modified Date
	☆ The manager must be present at every meeting	1			R	Rule	08-Sep-2017
	☆ Rivera Enterprise					Rule Set	08-Sep-2017
	☆ Recruit to Hire					Rule Folder	08-Sep-2017
	☆ Performance driven					Rule Folder	08-Sep-2017
	☆ People Caring					Rule Set	08-Sep-2017
	☆ IT candidates must be ITIL Foundation certified.	1			R	Rule	08-Sep-2017
	☆ All interviews must be conducted by at least two interviewers	1			R	Rule	08-Sep-2017
	☆ A candidate must be interviewed at least twice before they can be ...	1			R	Rule	08-Sep-2017
	☆ A background check must be implemented for each candidate.	1			R	Rule	08-Sep-2017

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.

4.10.3 Graph

Graphs are used as a visual representation of Rules. Graphs allow organizations and users to map out their Rules and provide key stakeholders with necessary information. They provide users with a high-level overview of Rules, as well as the processes and roles affected by these rules

The following will be covered in the Graph section:

1. [Graph Navigation](#)

- *2. Graph Types ([Impact](#), [Hierarchy](#))

4.10.3.1 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.

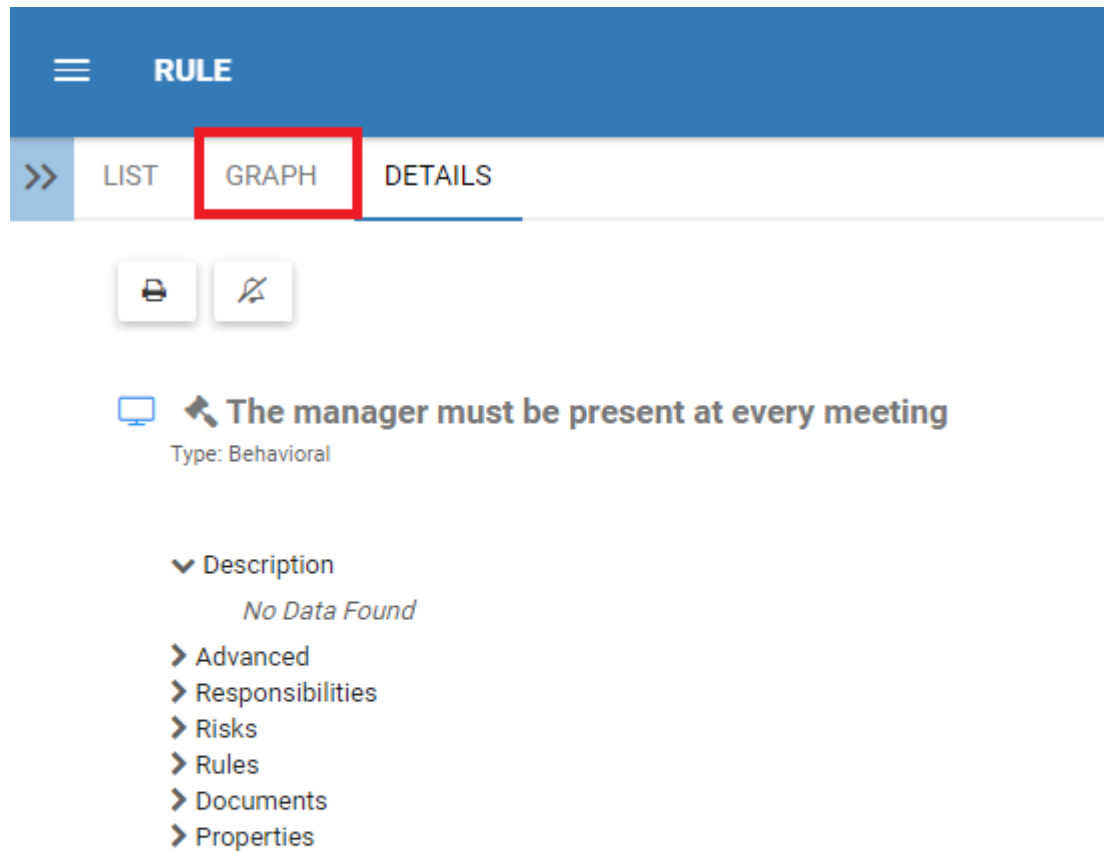
This section will outline Manual Navigation. Please see [Quick Graph View](#) section above for alternative navigation options.

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 **Rule**
3. By default, you will be directed to **List View** in the Rule module.
4. Select any item on the list by clicking on the desired line of the item



RULE



5. You will be prompted to the item's details page
6. Select the “Graph” tab on the upper left corner of the page



RULE

>> LIST **GRAPH** DETAILS

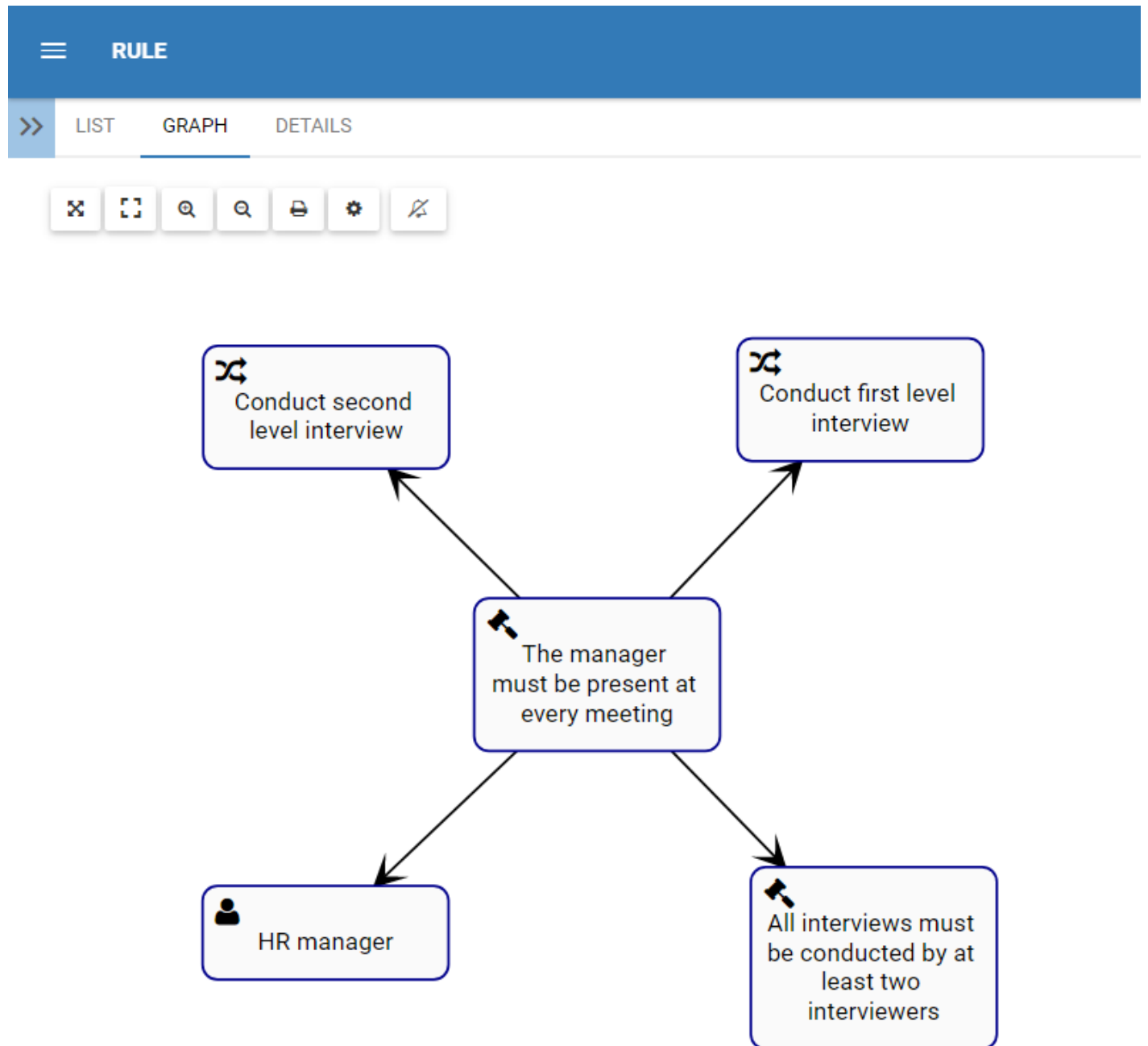
 

  **The manager must be present at every meeting**
Type: Behavioral

▼ Description
No Data Found

- > Advanced
- > Responsibilities
- > Risks
- > Rules
- > Documents
- > Properties

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





4.10.3.1.1 Navigation 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 Rule 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

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.

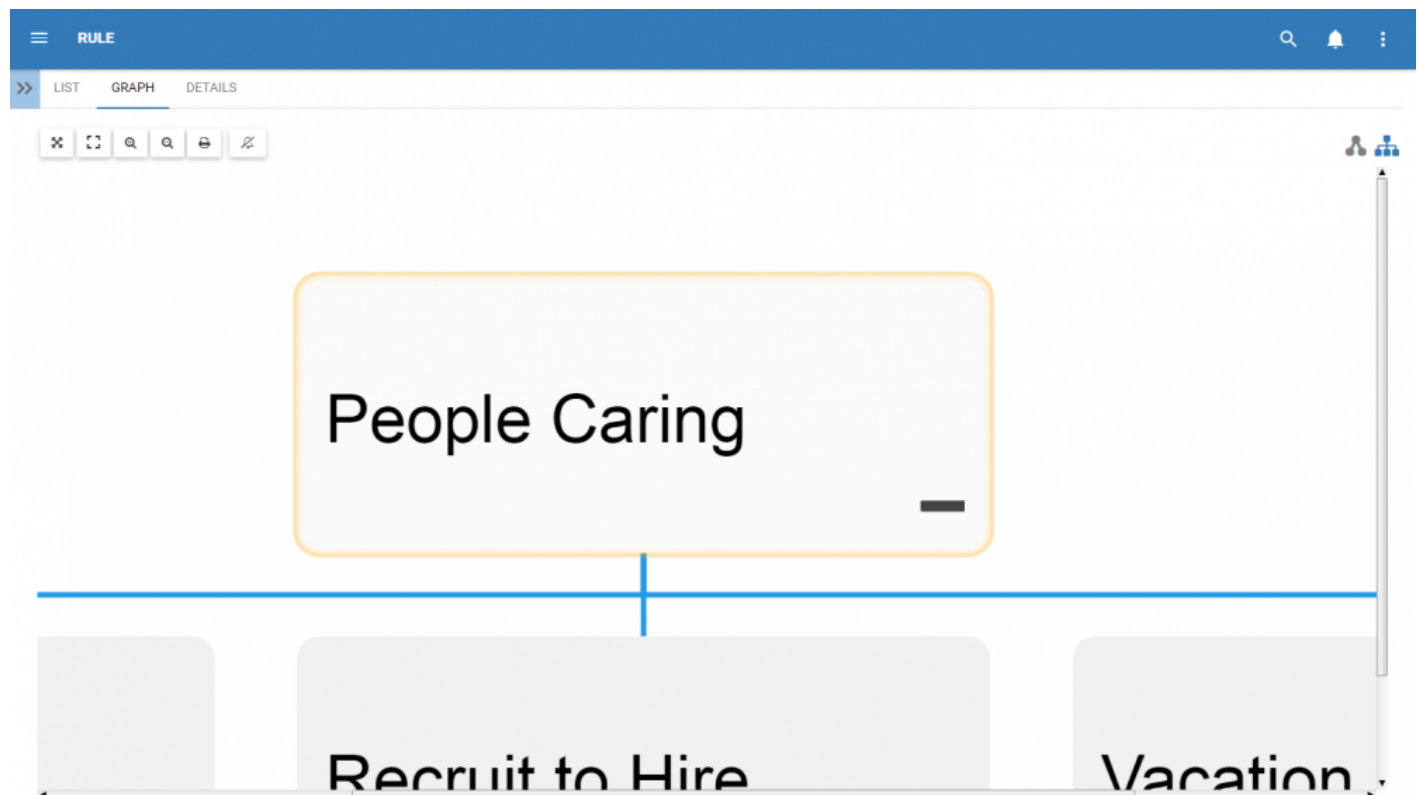
Item	Icon	Description
Impact Graph		Graph showing downstream representation of associated items
Hierarchy Graph		Graph showing a top-down view of items and how they fit within organizations


4.10.3.1.1.1 Fit Screen

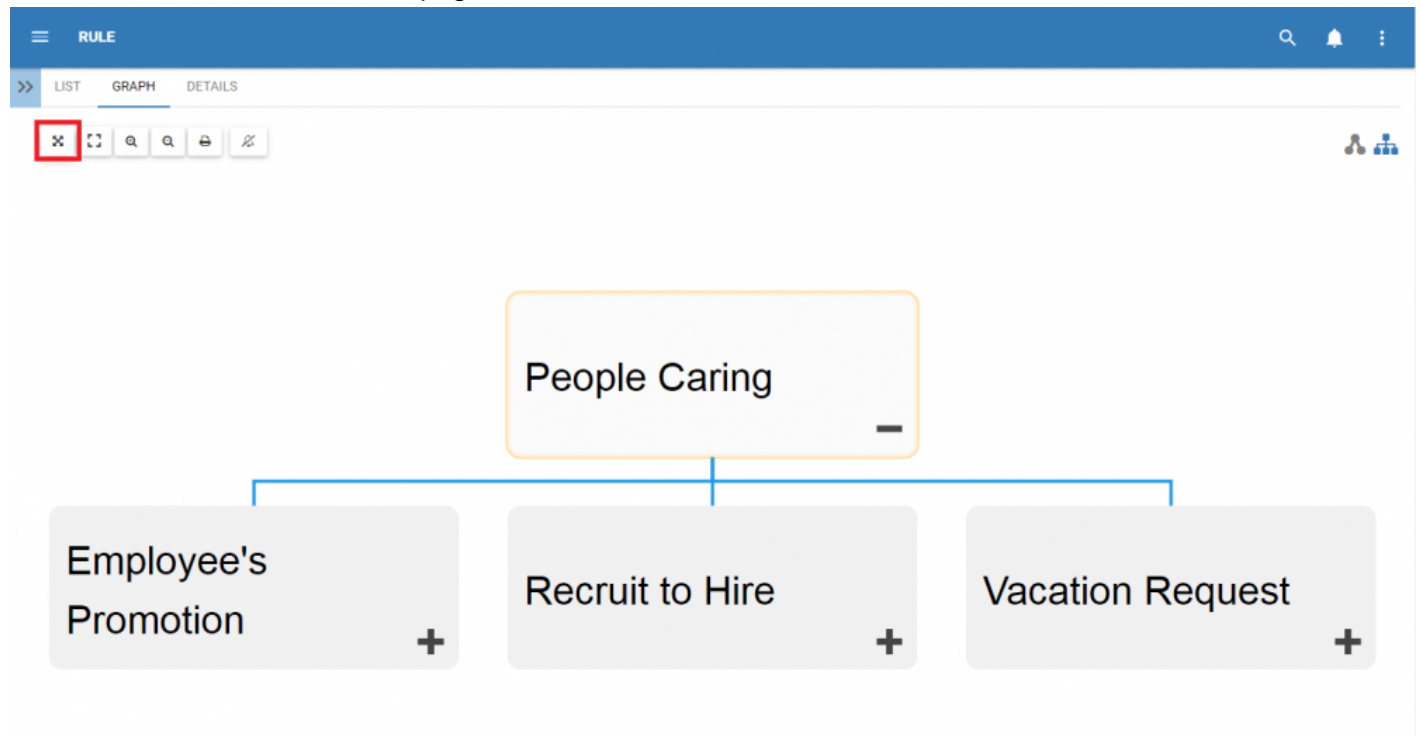
The fit screen function has been implemented to assist users at replacing and re-centering performance graphs.

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

1. Navigate to a Rule within the Rule Module
2. Click on the [Quick Graph View](#) icon 
3. Alter the Graph (Zoom in, out or shift). Please see [zoom in](#) instructions below for further details.





4. Click on button  and the page will be reset

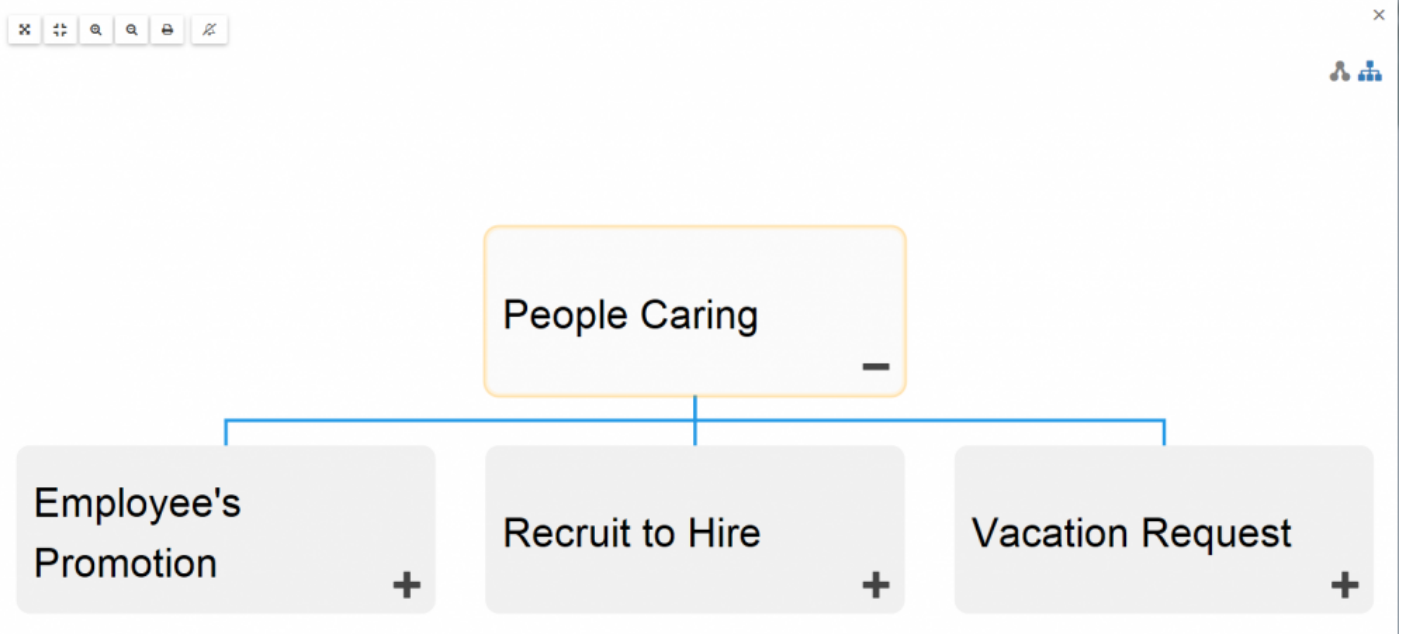




4.10.3.1.1.2 Full Screen

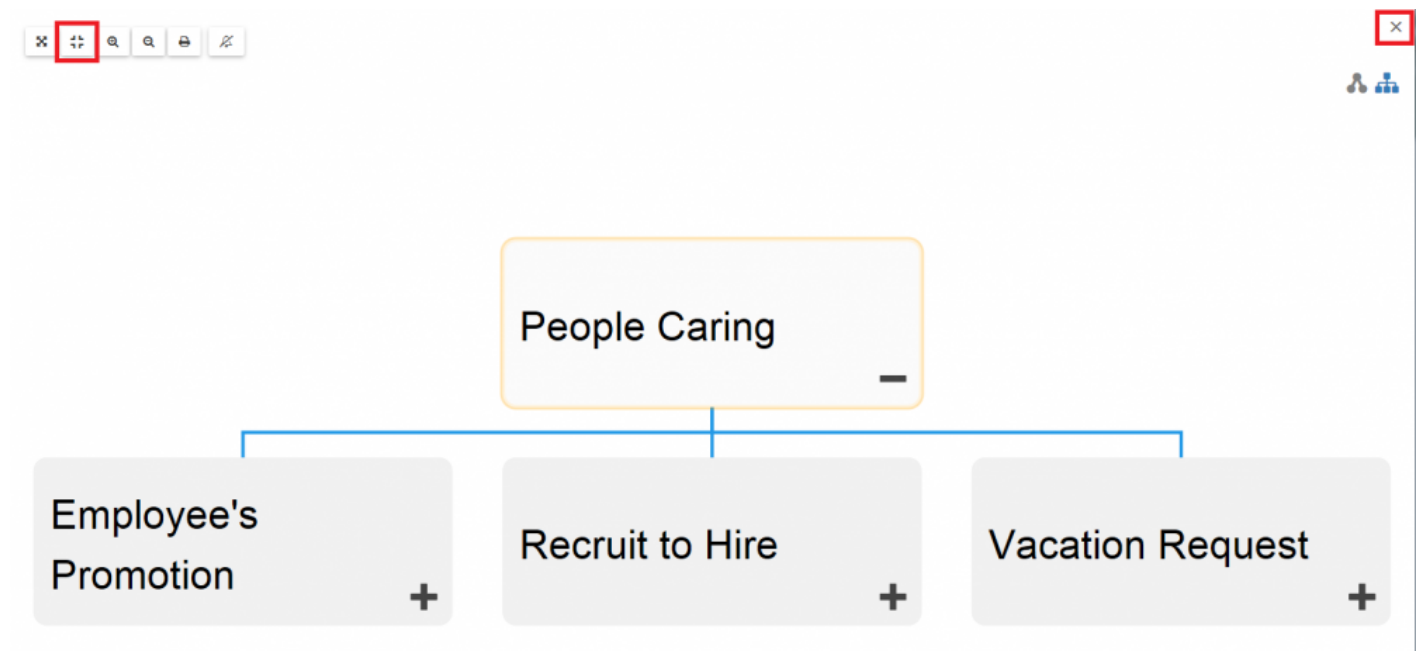
The fit screen function has been implemented to assist users at viewing Rules, utilizing the full screen of a user.

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

1. Navigate to a Rule Set within the Rule 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  or  on the upper right corner



4.10.3.1.1.3 Zoom in

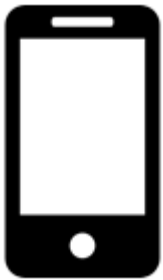
The zoom function has been implemented to assist users in viewing specific items within selected Rule items.

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

1. Navigate to a Rule Unit within the Rule 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.

4.10.3.1.1.4 Zoom Out

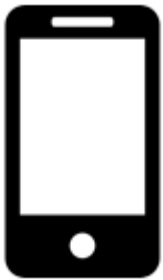
The zoom function has been implemented to assist users in viewing specific items within selected Rule items.

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

1. Navigate to a Rule Unit within the Rule 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

4.10.3.1.1.5 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 Rule Unit within the Rule 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

Print Settings



General

A Print Mode:

B Page Layout: **C** Page Size:

Multi page print only

D Graph Layout:

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 b. Legal	8.5 × 11.0 in (216 × 279 mm) 8.5 × 14.0 in (216 × 356 mm)

	c. A3 d. A4	11.7 × 16.54 in (297 × 420 mm) 8.3 × 11.7 in (210 × 297 mm)
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

Print Settings ×

General

Print Mode:

Single Page

Page Layout:

Landscape

Page Size:

Letter

Multi page print only

Graph Layout:

Left to Right

Close

Print

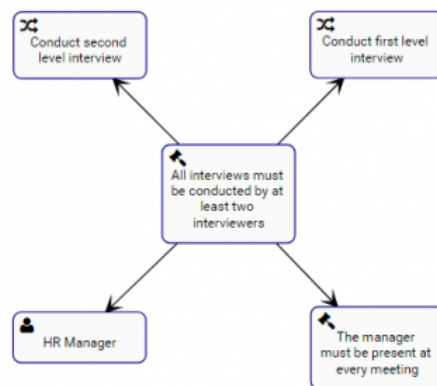
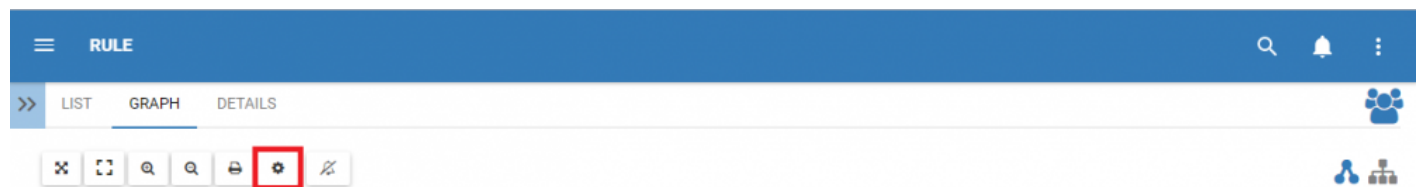
4.10.3.1.1.6 Options

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.

To use the Options button, please see the following instructions

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




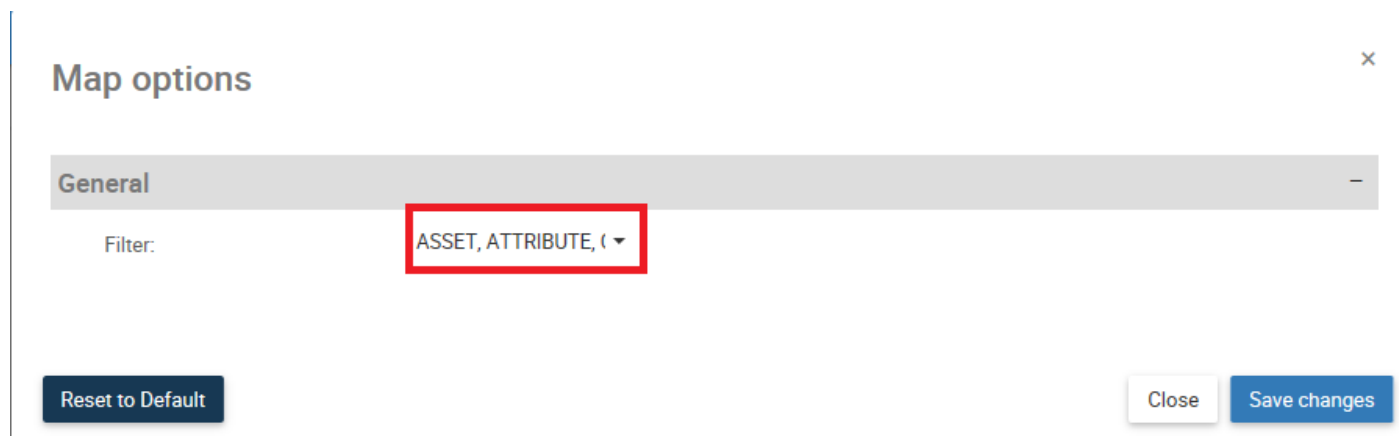
2. The Options panel will be displayed on the screen as shown



The image shows a 'Map options' dialog box with a close button (X) in the top right corner. Below the title bar, there is a 'General' tab. Under the 'Filter:' label, a dropdown menu is displayed with the text 'ASSET, ATTRIBUTE, (' and a downward arrow. At the bottom of the dialog, there are three buttons: 'Reset to Default' on the left, and 'Close' and 'Save changes' on the right.

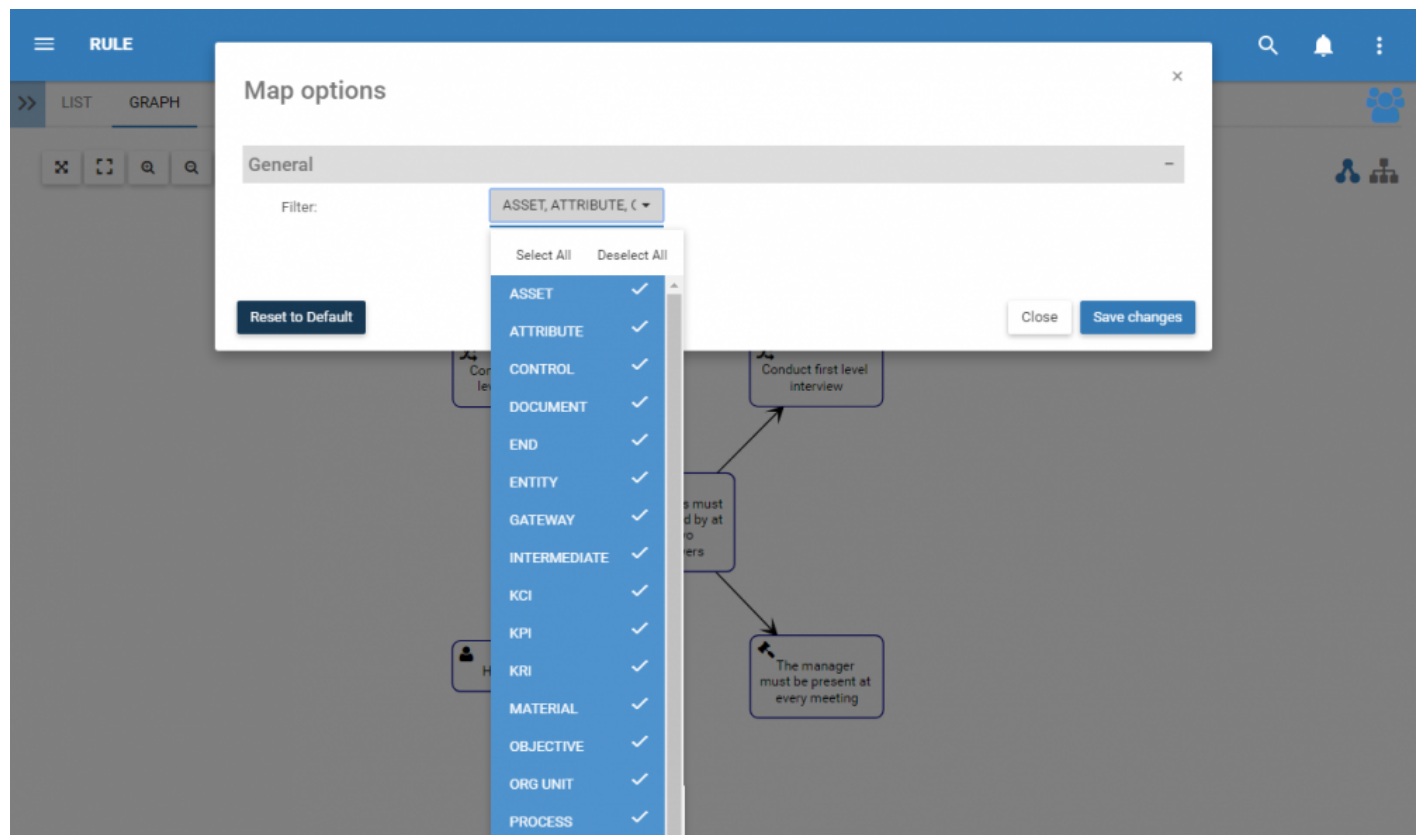
To customize the graph and use the Filter option, please see the steps below:

1. Select "Options" icon 
2. Navigate cursor to "Asset, Attribute"

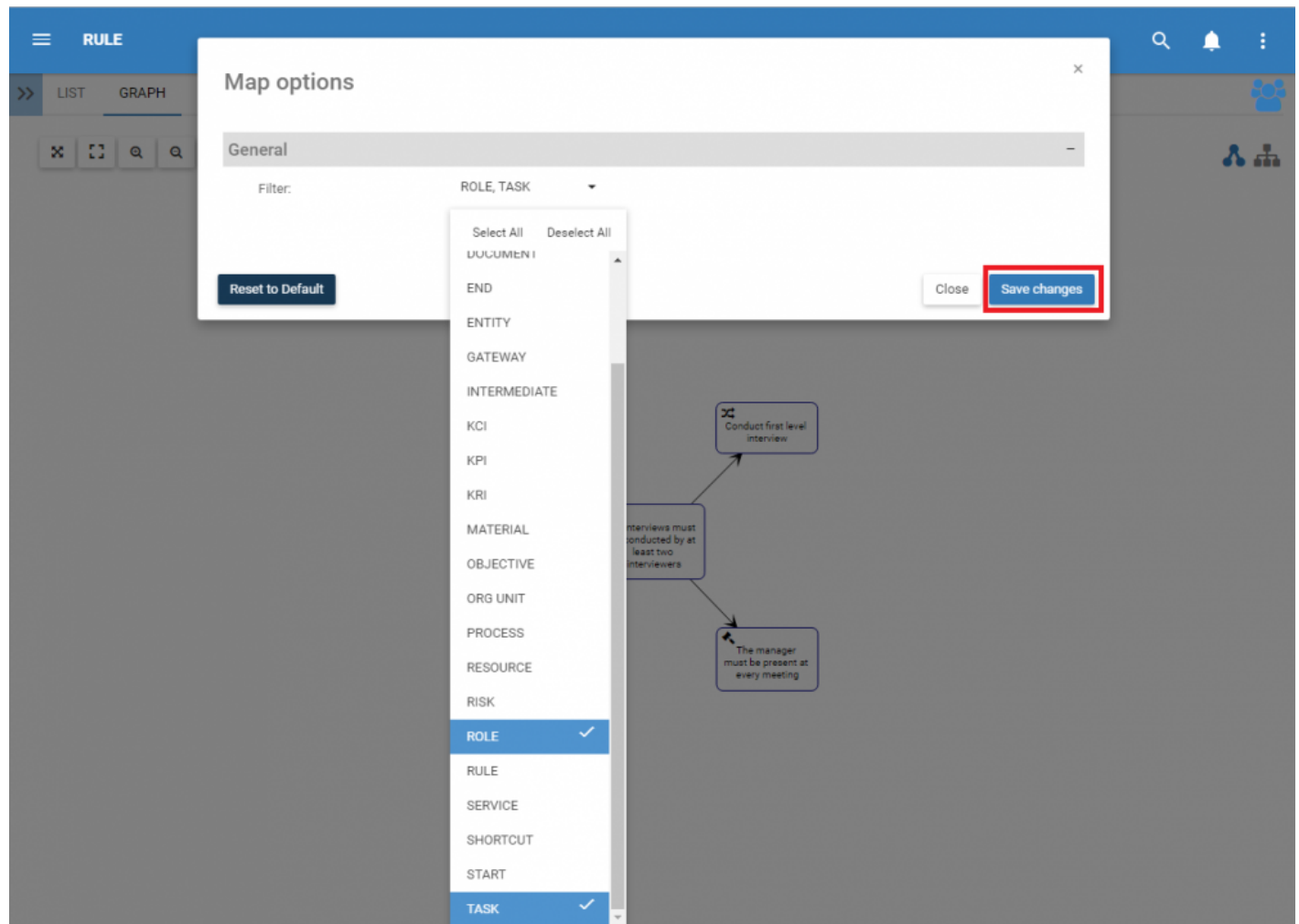


This image is identical to the one above, but with a red rectangular box highlighting the dropdown menu in the 'Filter:' section, which contains the text 'ASSET, ATTRIBUTE, (' and a downward arrow.

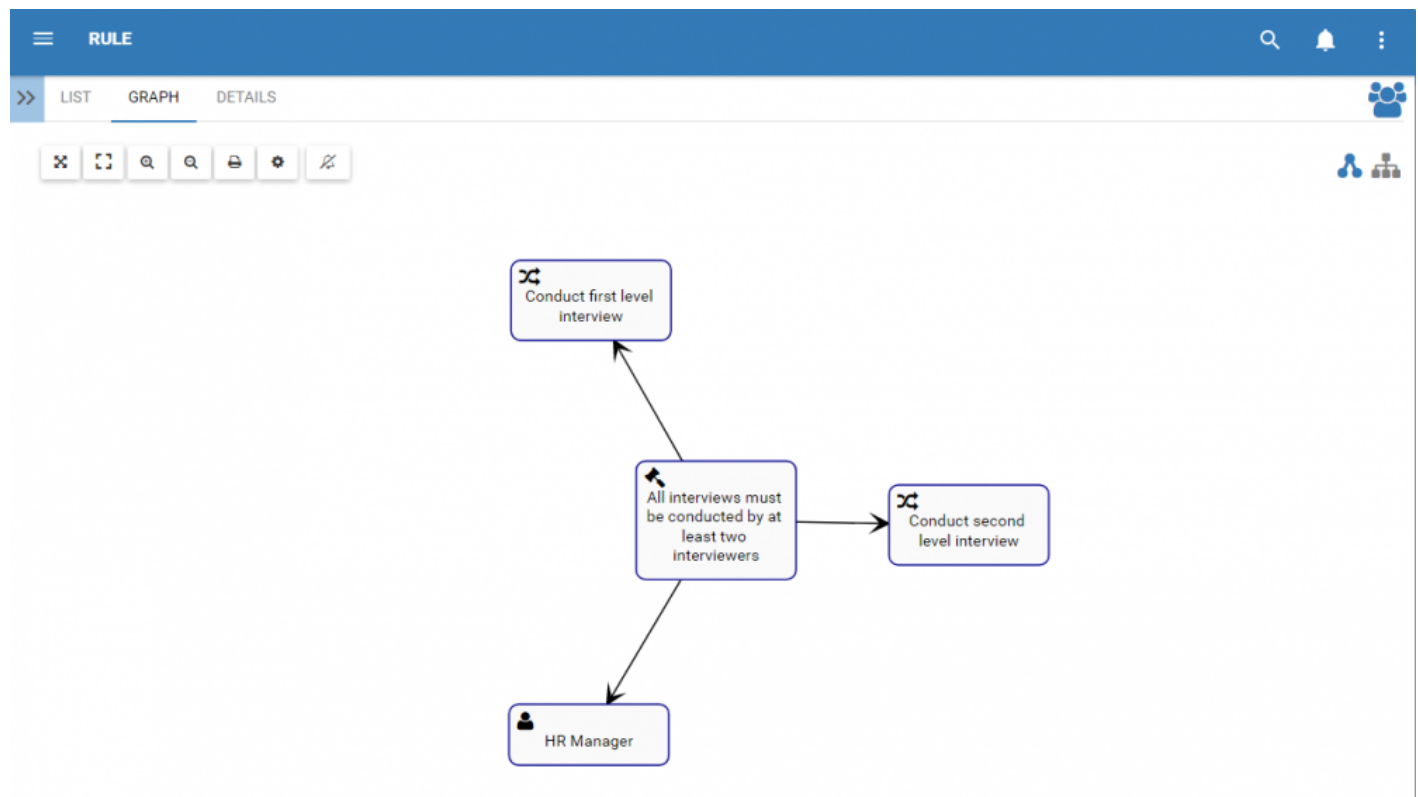
3. The following drop-down menu will be generated




4. Select the desired filter and select “Save Changes”. For this example, we will select **Role** and **Task**.



5. The following graph will be generating showing only the **Roles** and **Tasks** that are related to the specific **Performance Measure**






4.10.3.1.1.7 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.

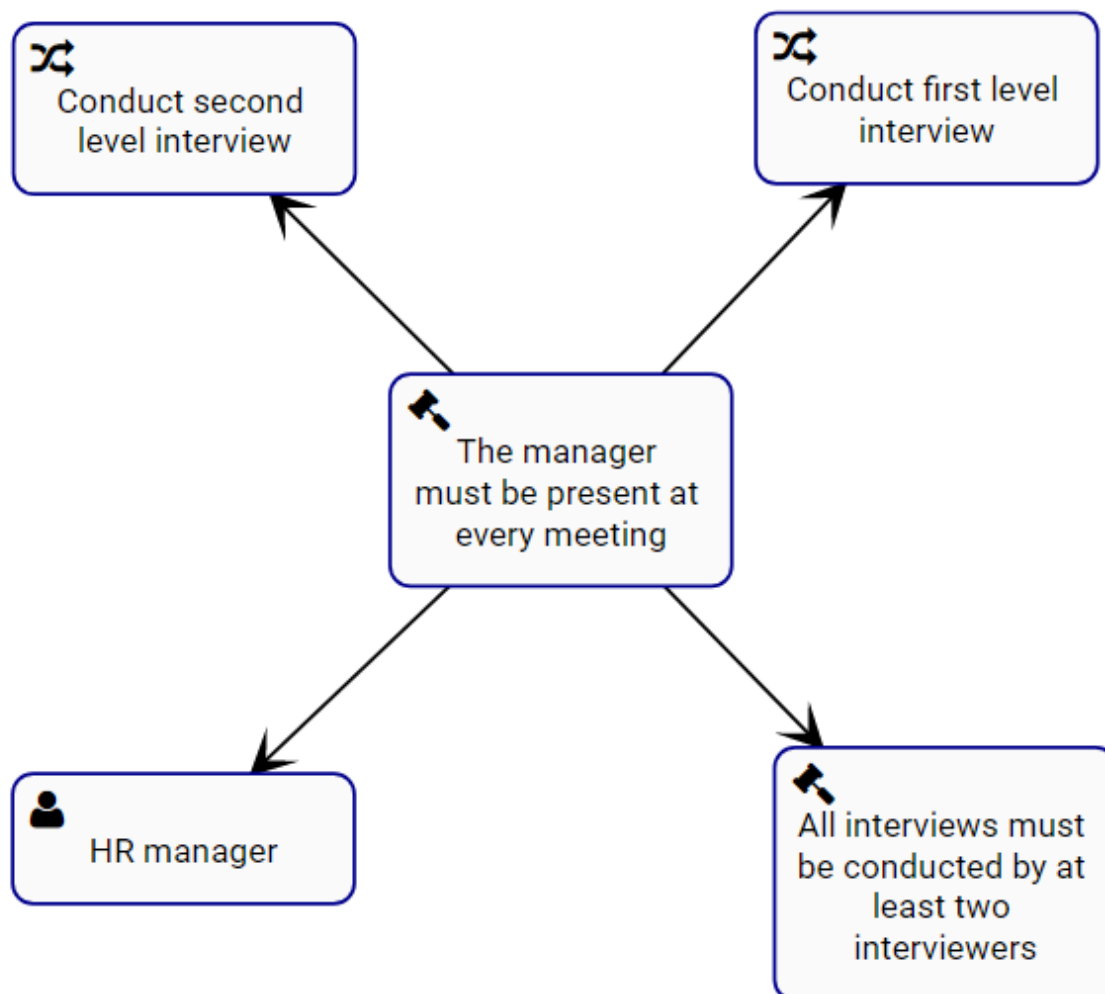
To use the Subscribe button, please see the following instructions.

1. Navigate to a Rule Unit within the Rule 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.

4.10.3.2 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

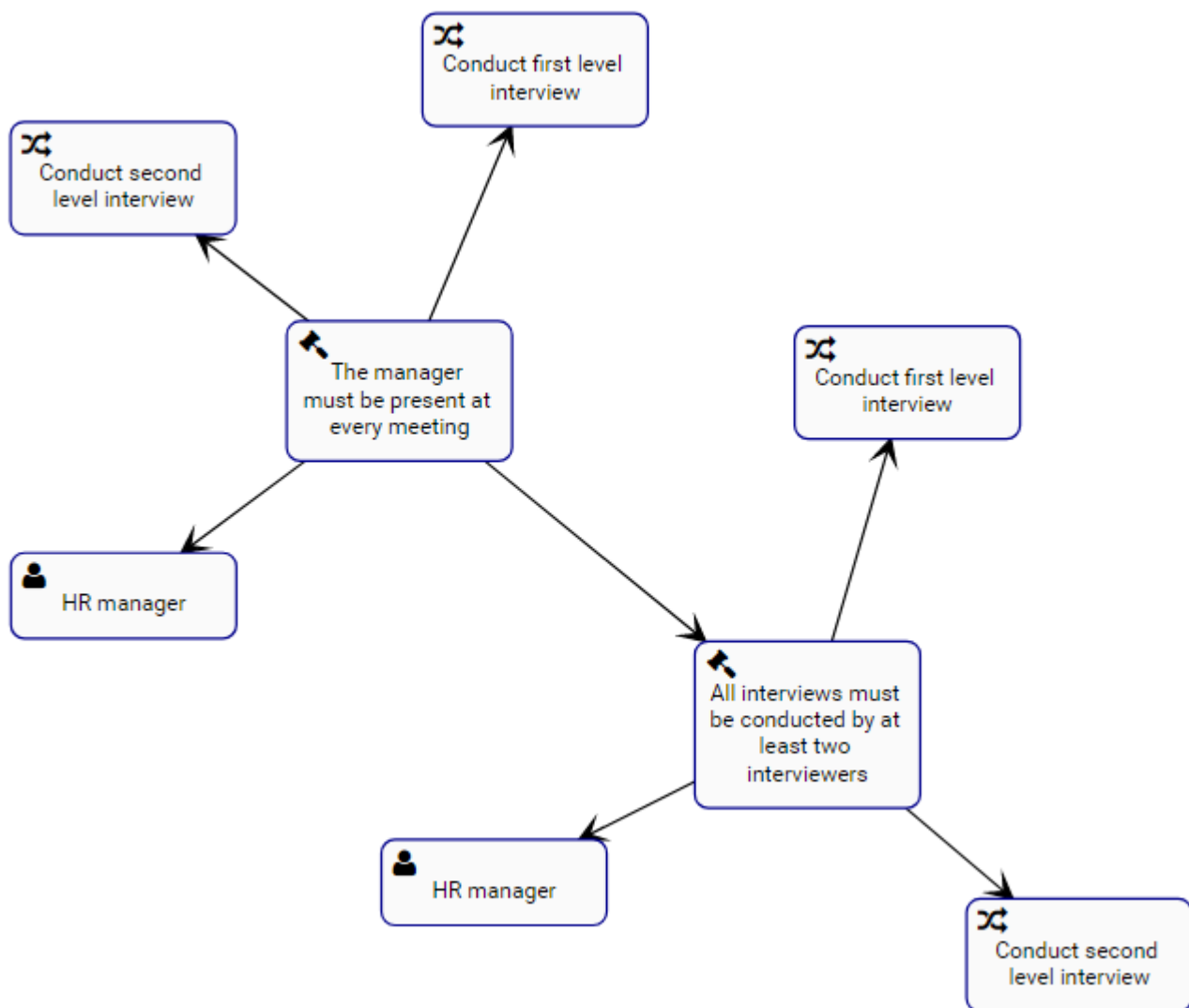


The example features the Impact Graph of the “The Manager Must be Present at Every Meeting” Rule. The Rule itself is associated to a Role “HR Manager”, to another rule “All interviews must be conducted by at least two interviewers”, and to two tasks “Conduct first level interview” and “Conduct second level interview.”

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.



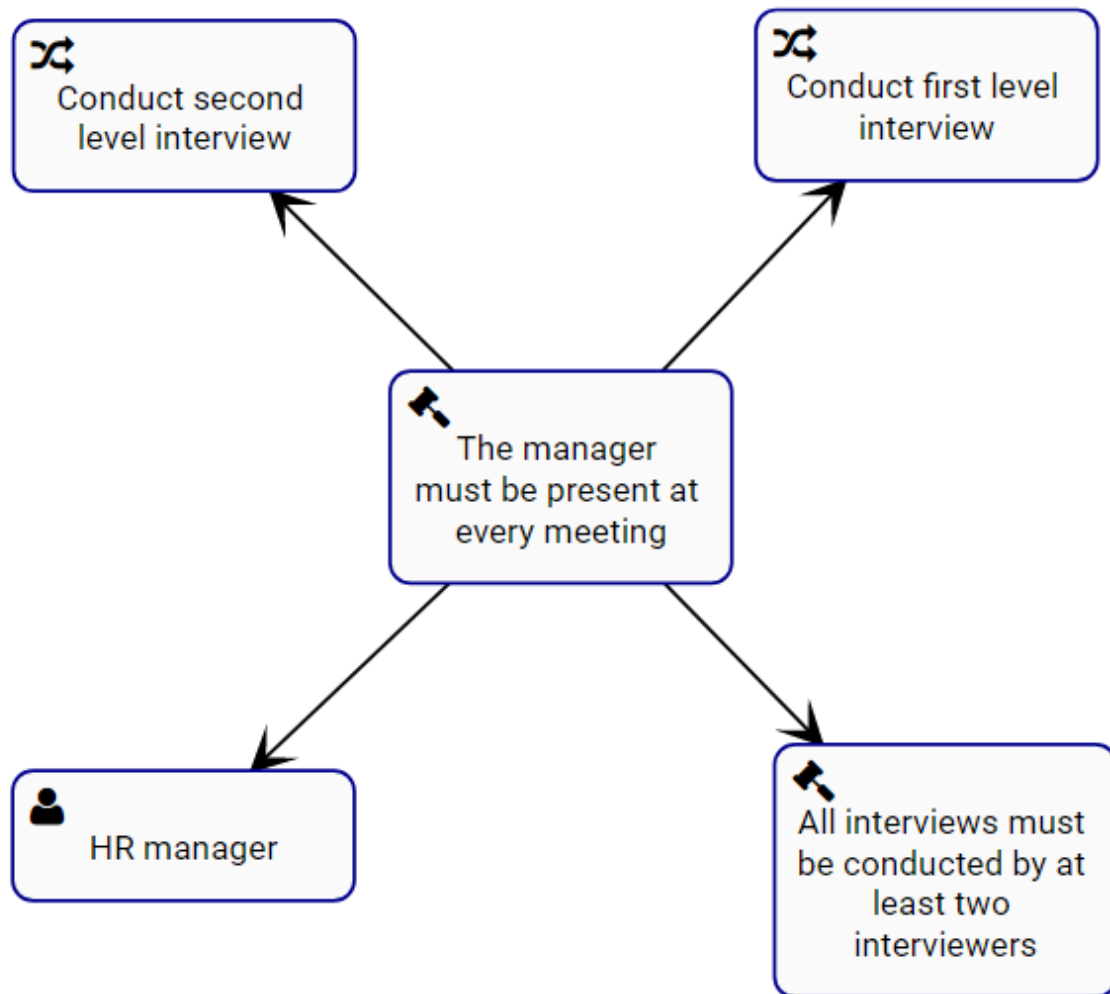
These Impact Graphs can be used to educate business users, to analyze internal business processes and help management optimize activities effectively. Additionally, they help in the preparation of change management plans, allowing managers to map out the effect of any organizational change

Impact Graph Navigation

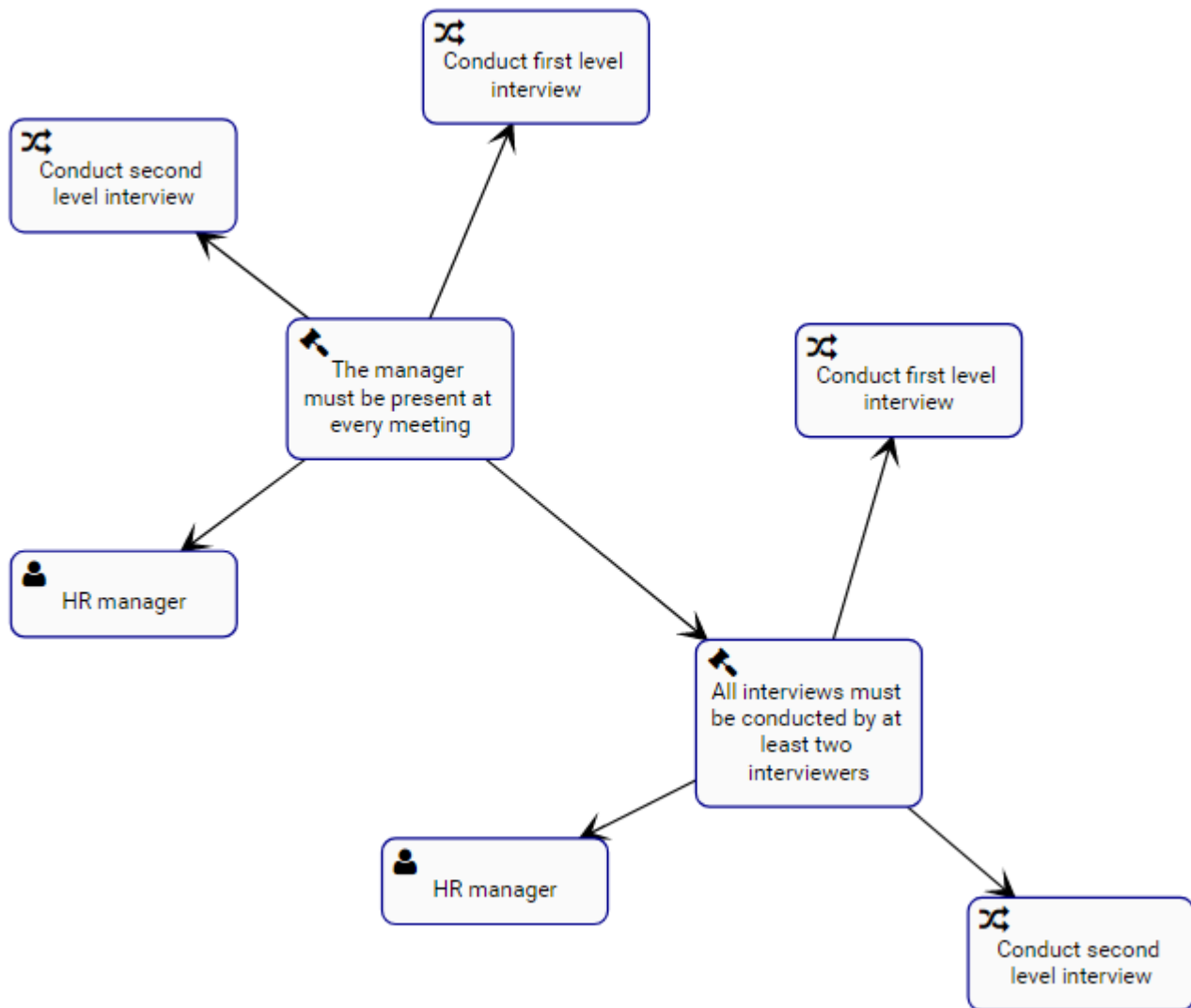
To navigate to Impact Graphs, please see the following instructions.

1. Navigate to a Rule within the Rule Module
2. Click on the [Quick Graph View](#) icon 

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



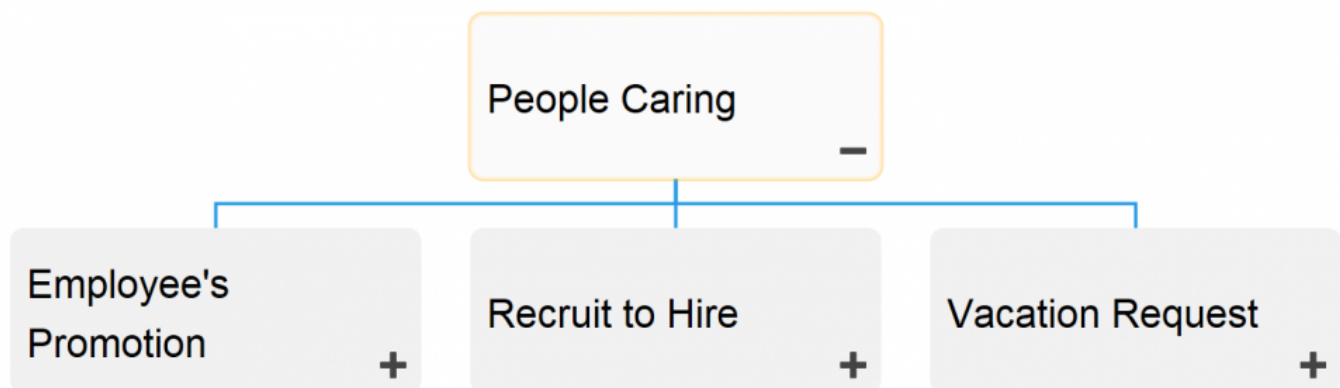
4. (Optional) To further expand the Impact Graph, simply double-click on the item to which you would like to display



4.10.3.3 Hierarchy Graph

Hierarchy Graphs allows users to view the vertical and horizontal hierarchy of Rule Sets and Rule Folders. This view provides users with a graphical representation of where specific Rules fit within the overall organization. This allows organizational users to understand organizational Rules 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 Rules
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 "Rule Folders or Rule Sets" in List View


3. Select the [Quick Graph View](#) icon  of the desired item

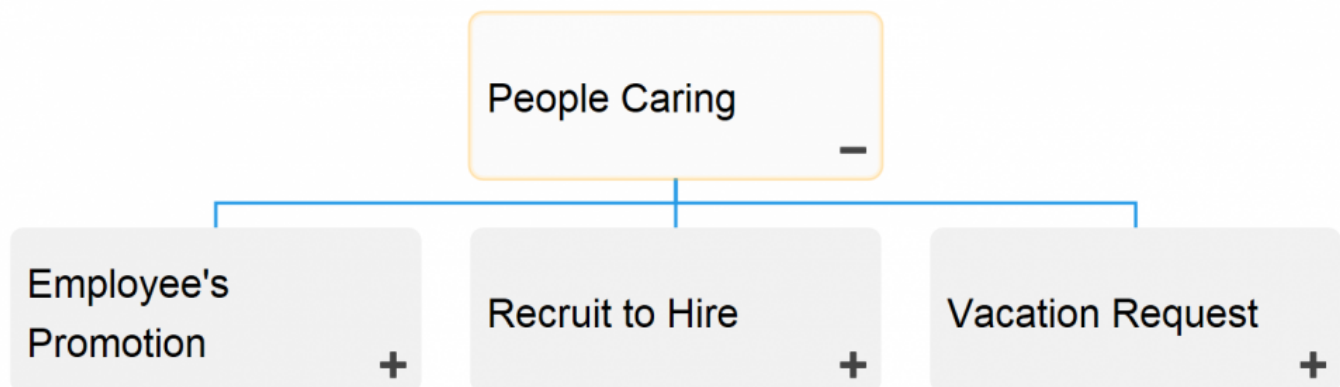
4. Please select the Hierarchy Graph icon 

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


People Caring

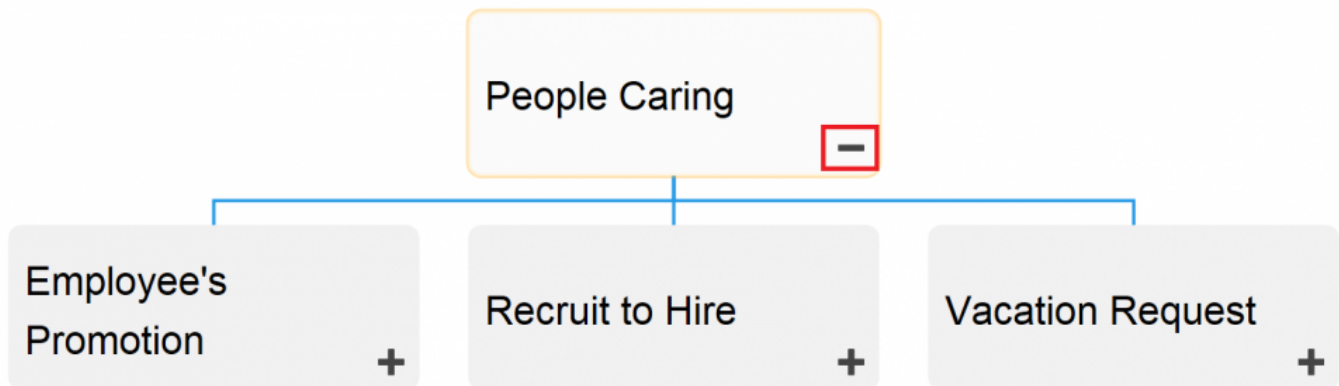


6. To further expand components of the Hierarchy Graph, double click on the  on the objects in the Graph. This will expand the item selected.



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

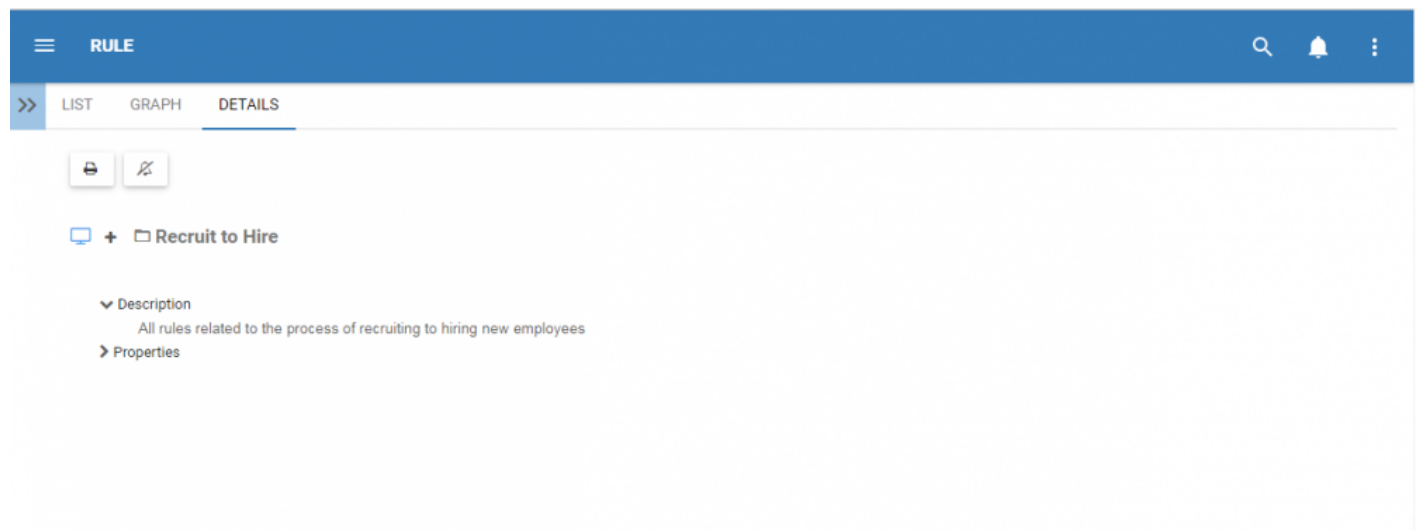
8. To close opened items, double-click on the  icon



4.10.4 Details

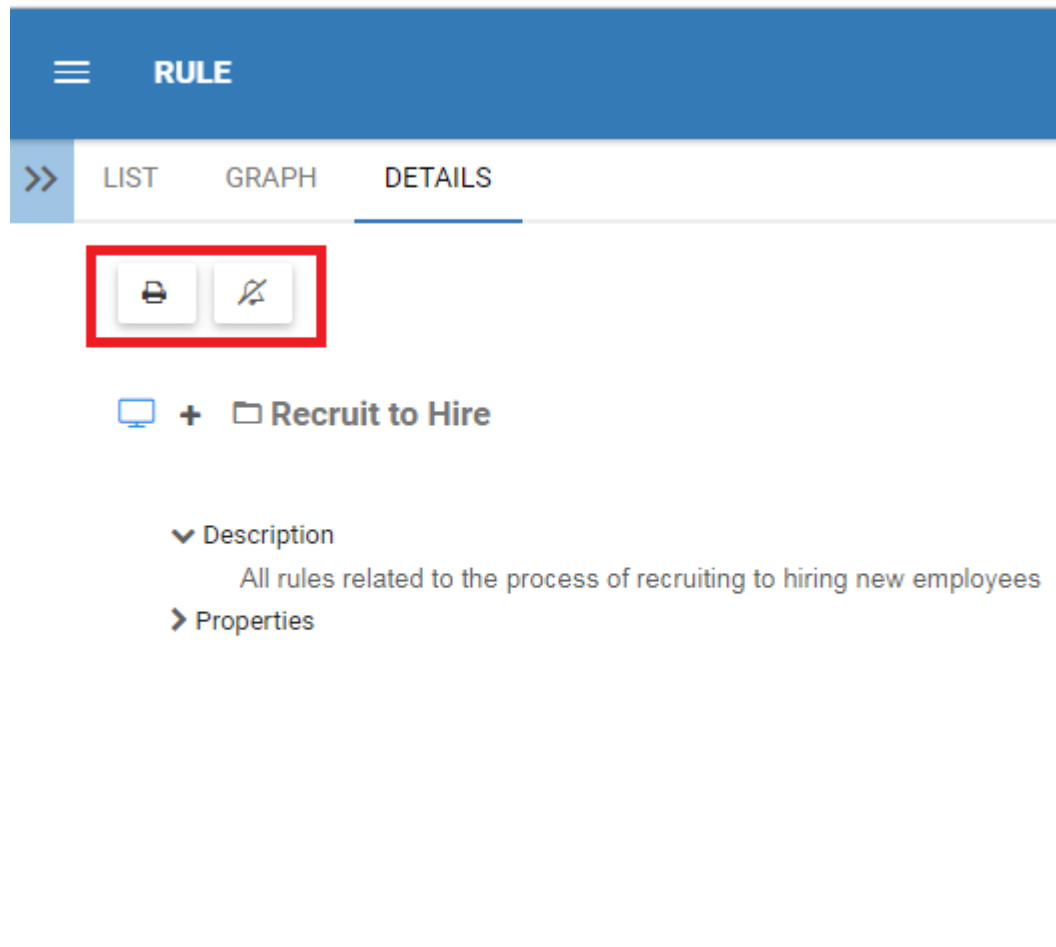
The Description section is where you will find details about the Rules folders, Rule Sets, or Rules you are observing. This rich text area allows for the display of all additional details that has been uploaded regarding the item in particular. These details provide users with all critical information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

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




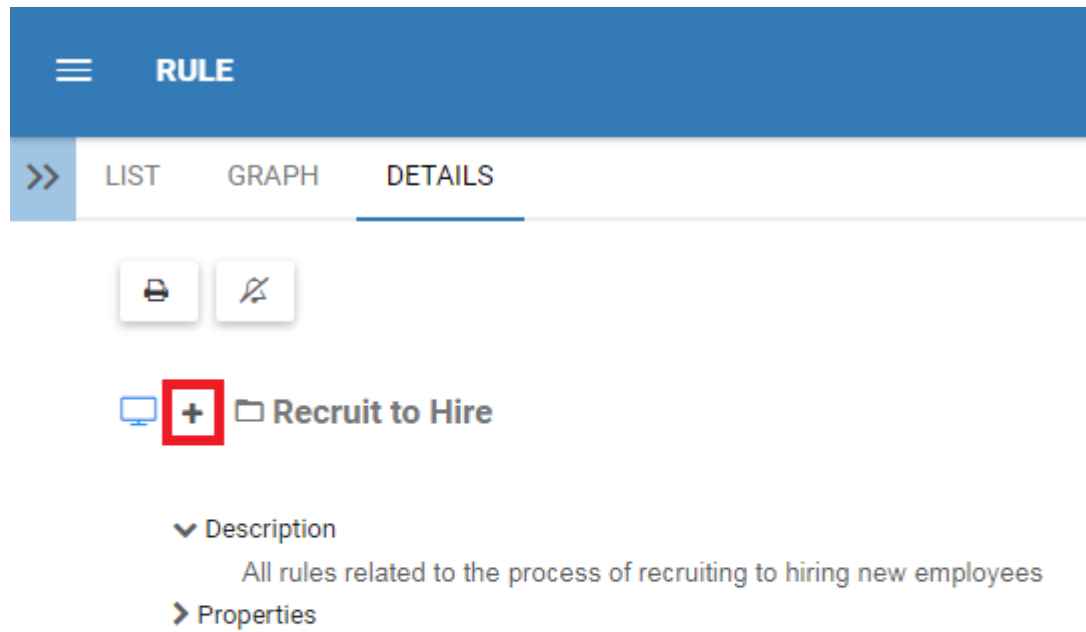
4.10.4.1 Navigation


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





When users view Rule folders under the [Details tab](#), users can view the child expansions of the Rule Folder.



1. Select the  icon to expand the Rule Folder







2. Select the  icon to hide the Rule Folder


 **RULE**



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


 


   **Recruit to Hire**


 **Description**
All rules related to the process of recruiting to hiring new employees


 **Properties**


  **30% diversity in the workforce**


 **Description**
No Data Found


 **Advanced**



 **Responsibilities**

 **Risks**


 **Rules**


 **Documents**


 **Properties**


  **A background check must be implemented for each candidate.**


Type: [fr] Behavioral


 **Description**
No Data Found


 **Advanced**

 **Responsibilities**

 **Risks**




 **Rules**

 **Documents**

 **Properties**

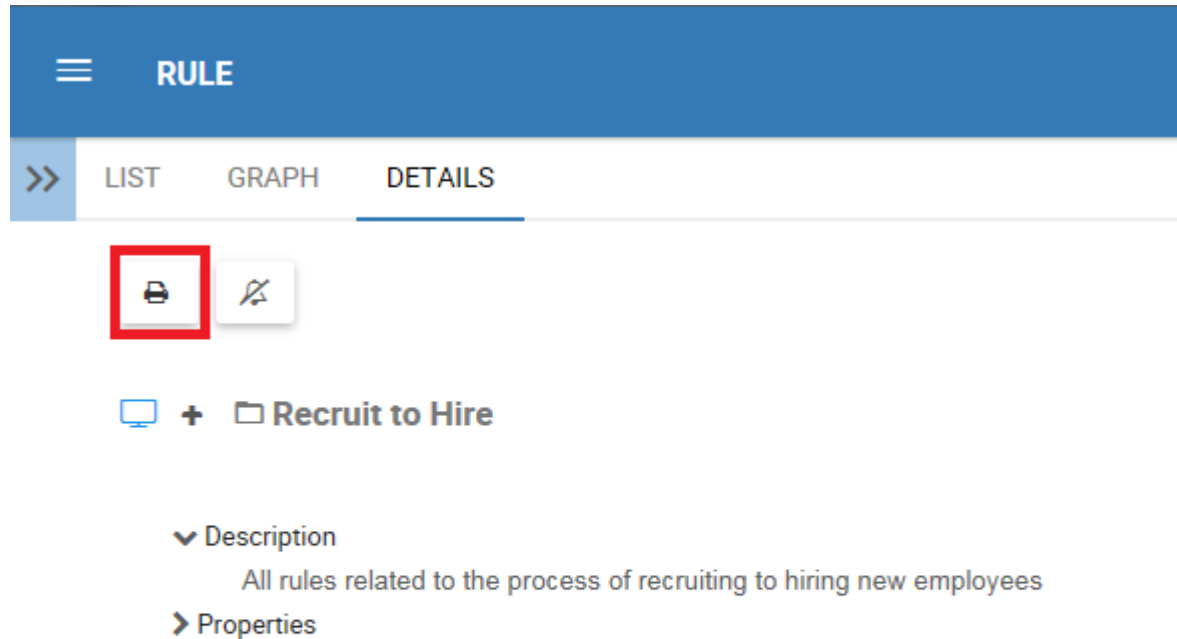
4.10.4.1.1 Toolbar

The toolbar on the Rule Module 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 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.



4.10.4.1.1.1 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.



4.10.4.1.1.2 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 rules to simplify and centralize monitoring activities. By subscribing to items, users will receive notifications when rules are altered or optimized, as well when another user collaborates or comments on the rule. Additionally, a widget in the Home Page can be created with all the item the user subscribed to.

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


4.10.4.2 Attributes


Users can find a variety of information about objects within the details section. This information allows users to fully understand all information about a specific Rule, Rule Set or Rule Folder, and provides users with a specific destination that can be used to see and gather all relevant information.

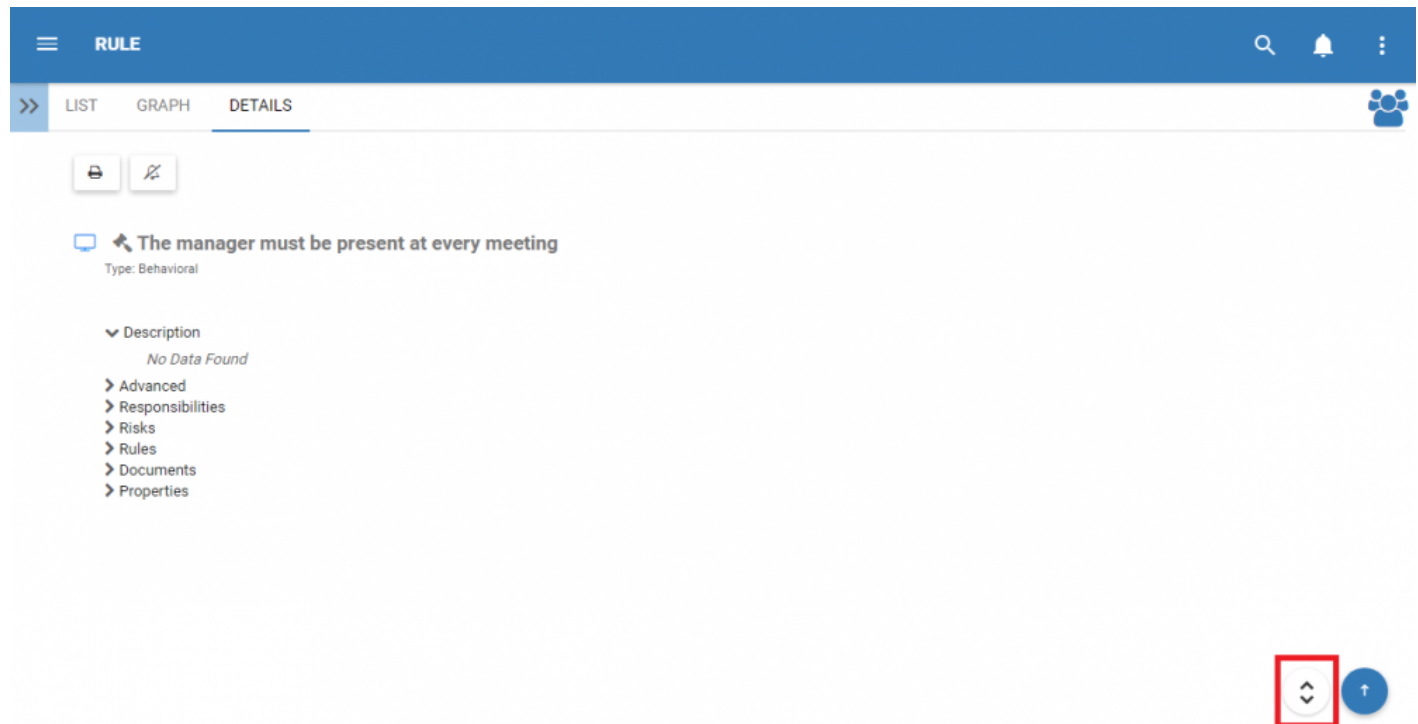
Rule Details display the following content

1. [Description](#)
2. [Advanced](#)
3. [Responsibilities](#)
4. [Risks](#)
5. [Rules](#)
6. [Documents](#)
7. [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

4.10.4.2.1 Description

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

4.10.4.2.2 Advanced

The advanced section provides more information about the rule, such an example of the rule, its history and its source.

4.10.4.2.3 Responsibilities

The Responsibilities section displays the roles, resources and/or assets that are responsible for the Rule 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.

▼ Responsibilities

▼ Roles

 [HR manager \[R \]](#)

4.10.4.2.4 Risks

The risk section displays any risk that is related to the specific rule you are viewing.

4.10.4.2.5 Rules

The Rule section displays any additional lower level rule that is associated to a higher level rule.



All interviews must be conducted by at least two interviewers

Type: Policy

▼ Description

No Data Found

- Advanced
- Responsibilities
- Risks
- Rules
- Documents
- Properties

4.10.4.2.6 Documents


This section lists all documents that have tied to the Rule being viewed. This provides users with a list of relevant documents, as well as 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.

▼ Documents

 [Interest Questionnaire \(DOCX\)](#)  

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](#) .

4.10.4.2.7 Properties

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

4.11 Master Data

The Web App allows users to view Master Data Sets, Master Data Folders, Entities and Attributes that are associated to business processes and activities. Master data standardizes information, it enables the integration of data throughout an organization's business processes.

Master data consists of Entities and Attributes; Entities and Attributes represent how data is broken down. Entities are artifacts that contain pieces of data, and attributes are the individual pieces of data; entities are made up of attributes.

Linking Master Data (Entities and Attributes) to Process and Activities enables users to see what business processes and tasks impact and how as well as to be more productive and efficient using accurate data.

EPC unites processes and data in a single managed repository by using CRUD. Users can use the permission setting CRUD for Entities and Attributes on Process and Activities preventing duplicate data creations and allowing to better manage data modifications and security.

Create	Create or add new Entities and Attributes
Read	Read, retrieve, search, or view existing Entities and Attributes
Update	Update or edit existing Entities and Attributes
Delete	Delete/deactivate/remove existing Entities and Attributes

The EPC provides 2 types of graphs for users to view Master Data:

1. [Impact Graphs](#)
2. [Hierarchy Graphs](#)

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

4.11.1 Module Overview

EPC's Master Data module allows users to organize and manage data. The EPC provides 3 different dimensions, allowing users to properly view and understand their organizational structure.

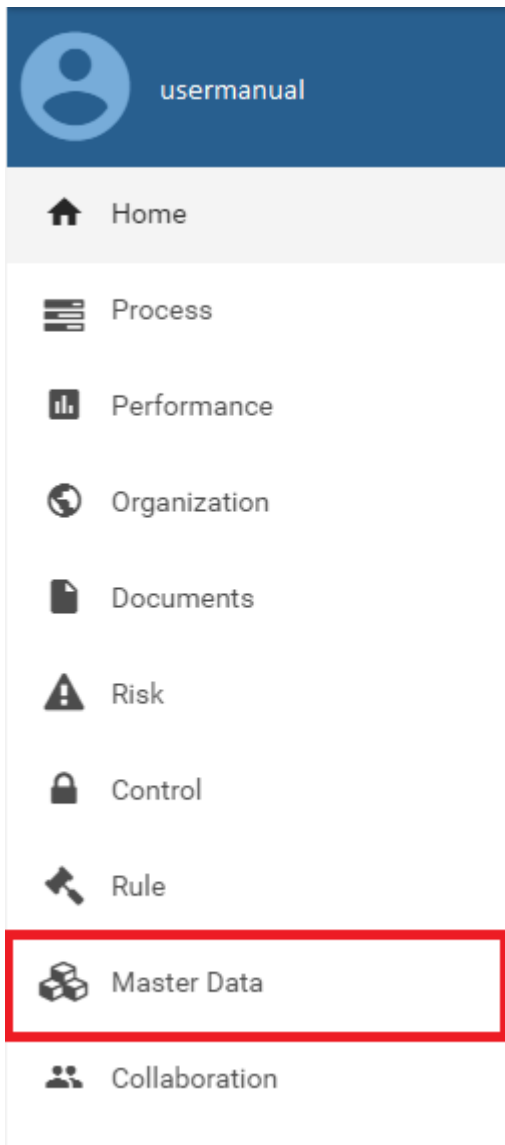
Dimension	Details
1. List	Provides view of all risk sets you have access to
2. Graph	Provides the visual representation of the risk set, their features and links (Impact and Hierarchy Graphs)
3. Details	Provides additional key information regarding specific risk details

How to access the Master Data module:

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



2. Click on **Master Data**



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

4.11.2 List

List view allows users to see all Master Data Set, Master Data Folders, Entities and Attributes they have access to, including the specific details within them. Viewing Master Data items in a list allows users to have a quick view of various Master Data items, facilitating navigation.

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
Type	The type of the object
Subtype	Whether or not the item in question is associated to a Subtype
Attributes	Whether or not there is an Attribute attached to 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
Modified Date	The last date that the object in question was modified
Status	View the status of the item in question when Show Latest mode is on



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 **Master Data**

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

MASTER DATA								🔍	🔔	⋮
>>		LIST	GRAPH	DETAILS						
★	Name ▲	Type	Subtype	Attributes	Description	My RASCI-VS	Modified Date	Status	⋮	
🔍	☆ Current Prospects	Master Data Set					27-Sep-2017	Published		
🔍	☆ Order Data	Master Data Set					12-Sep-2017	Published		
🔍	☆ People Caring	Master Data Set					27-Sep-2017	Published		

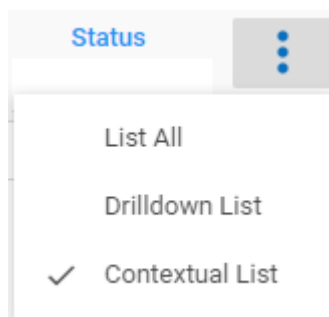
To simplify Master Data viewing; users **are not** greeted with all major Master Data items that they are associated too. Users are greeted with the list of Master Data Sets, the highest level of Master Data Classification in the EPC. However users can display these Master Data items within the **List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



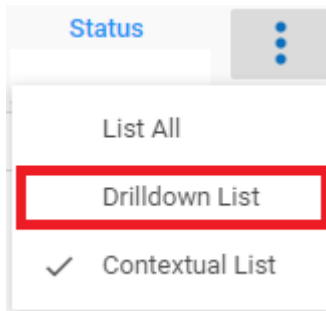
These steps are only required if a user is using an account or browser for the first time. As noted above, list preferences will be saved by user and browser to simplify navigation.

4. **(Optional)** To view further Master Data items, 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-refresh the page

MASTER DATA								
LIST GRAPH DETAILS								
★	Name ▲	Type	Subtype	Attributes	Description	My RASCI-VS	Modified Date	Status
☆	Amount	Attribute	Float				12-Sep-2017	Published
☆	comment	Attribute	String				12-Sep-2017	Published
☆	Current Prospects	Master Data Set					27-Sep-2017	Published
☆	Customer	Attribute	String				12-Sep-2017	Published
☆	date	Attribute	Data				12-Sep-2017	Published
☆	email	Attribute	String				12-Sep-2017	Published
☆	Item no	Attribute	Integer				12-Sep-2017	Published
☆	Order	Entity		9		A	12-Sep-2017	Published
☆	Order Data	Master Data Set					12-Sep-2017	Published
☆	Orders	Master Data Folder					12-Sep-2017	Published
☆	People Caring	Master Data Set					27-Sep-2017	Published
☆	quantity	Attribute	Integer				12-Sep-2017	Published
☆	Save order request - request	Entity		9			12-Sep-2017	Published
☆	Save order request - response	Entity		1			12-Sep-2017	Published
☆	Save order request return	Attribute	Boolean				12-Sep-2017	Published
☆	status	Attribute	String				12-Sep-2017	Published
☆	unit price	Attribute	Integer				12-Sep-2017	Published

4.11.2.1 Sorting

Sorting allows users to classify Master Data 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 Master Data in List View:

Filter	Details
Favorite	Allows users to sort Master Data items by favorites vs. non-favorites
Name	Allows users to sort Master Data items by a key number or word within document name
Type	Allows users to sort Master Data items based on their specific type
Subtype	Allows users to sort Master Data items based on its Subtype
Modified Date	Allows users to sort Master Data items chronologically by date last modified
Status	Allows users to sort Master Data items based on their status

How to use “Sorting” Function

1. Navigate to the Master Data 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.

MASTER DATA								
<div> <div>>></div> <div>LIST</div> <div>GRAPH</div> <div>DETAILS</div> </div>								
★ Name ▾	Type	Subtype	Attributes	Description	My RASCI-VS	Modified Date	Status	⋮
☆ Amount	Attribute	Float				12-Sep-2017	Published	
☆ comment	Attribute	String				12-Sep-2017	Published	
☆ Current Prospects	Master Data Set					27-Sep-2017	Published	
☆ Customer	Attribute	String				12-Sep-2017	Published	
☆ date	Attribute	Data				12-Sep-2017	Published	
☆ email	Attribute	String				12-Sep-2017	Published	
☆ item no	Attribute	Integer				12-Sep-2017	Published	
☆ Order	Entity		9		A	12-Sep-2017	Published	
☆ Order Data	Master Data Set					12-Sep-2017	Published	
☆ Orders	Master Data Folder					12-Sep-2017	Published	
☆ People Caring	Master Data Set					27-Sep-2017	Published	
☆ quantity	Attribute	Integer				12-Sep-2017	Published	
☆ Save order request - request	Entity		9			12-Sep-2017	Published	
☆ Save order request - response	Entity		1			12-Sep-2017	Published	
☆ Save order request return	Attribute	Boolean				12-Sep-2017	Published	
☆ status	Attribute	String				12-Sep-2017	Published	
☆ unit price	Attribute	Integer				12-Sep-2017	Published	

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

MASTER DATA								
<div> <div>>></div> <div>LIST</div> <div>GRAPH</div> <div>DETAILS</div> </div>								
★ Name ▾	Type	Subtype	Attributes	Description	My RASCI-VS	Modified Date	Status	⋮
☆ unit price	Attribute	Integer				12-Sep-2017	Published	
☆ status	Attribute	String				12-Sep-2017	Published	
☆ Save order request return	Attribute	Boolean				12-Sep-2017	Published	
☆ Save order request - response	Entity		1			12-Sep-2017	Published	
☆ Save order request - request	Entity		9			12-Sep-2017	Published	
☆ quantity	Attribute	Integer				12-Sep-2017	Published	
☆ People Caring	Master Data Set					27-Sep-2017	Published	
☆ Orders	Master Data Folder					12-Sep-2017	Published	
☆ Order Data	Master Data Set					12-Sep-2017	Published	
☆ Order	Entity		9		A	12-Sep-2017	Published	
☆ item no	Attribute	Integer				12-Sep-2017	Published	
☆ email	Attribute	String				12-Sep-2017	Published	
☆ date	Attribute	Data				12-Sep-2017	Published	
☆ Customer	Attribute	String				12-Sep-2017	Published	
☆ Current Prospects	Master Data Set					27-Sep-2017	Published	
☆ comment	Attribute	String				12-Sep-2017	Published	
☆ Amount	Attribute	Float				12-Sep-2017	Published	

4.11.2.2 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 Master Data list by the following.

Component	Description
Name	Textual search for any existing name of an object
Type	Master Data Set Master Data Folder Entity Attribute
Subtype	Subtypes created by admin
Attributes	Empty – The object has no attributes Not Empty – The object has at least one attribute
Description	Empty – The object has no description Not Empty – The object has at least one description
My RASCI-VS	Responsible Accountable Support Consulted Informed Verifier Signatory
Modified Date	The specific dates that things have been modified by
Status	In Progress Published Sent for a review Approved Rejected

The Filtering section will cover the following:

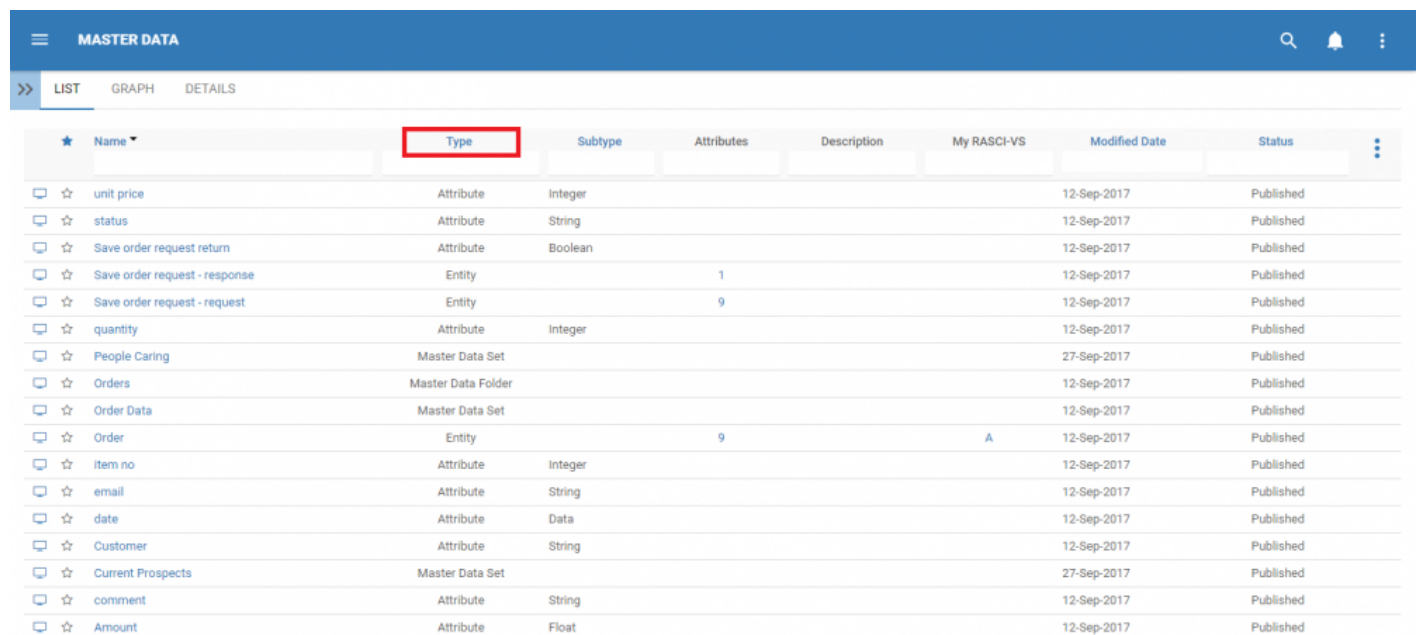
1. [How to Add Filters](#)
2. [How to Remove Filters](#)
3. [How to Combine Filters](#)

4.11.2.2.1 Add Filter

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

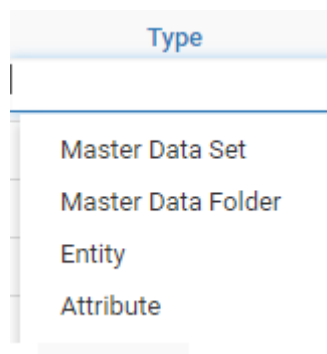
How to Add Filter

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



Name	Type	Subtype	Attributes	Description	My RASCI-VS	Modified Date	Status
unit price	Attribute	Integer				12-Sep-2017	Published
status	Attribute	String				12-Sep-2017	Published
Save order request return	Attribute	Boolean				12-Sep-2017	Published
Save order request - response	Entity		1			12-Sep-2017	Published
Save order request - request	Entity		9			12-Sep-2017	Published
quantity	Attribute	Integer				12-Sep-2017	Published
People Caring	Master Data Set					27-Sep-2017	Published
Orders	Master Data Folder					12-Sep-2017	Published
Order Data	Master Data Set					12-Sep-2017	Published
Order	Entity		9		A	12-Sep-2017	Published
item no	Attribute	Integer				12-Sep-2017	Published
email	Attribute	String				12-Sep-2017	Published
date	Attribute	Data				12-Sep-2017	Published
Customer	Attribute	String				12-Sep-2017	Published
Current Prospects	Master Data Set					27-Sep-2017	Published
comment	Attribute	String				12-Sep-2017	Published
Amount	Attribute	Float				12-Sep-2017	Published

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



3. Select the desired filter. For this example, we will select **Attribute** and **Master Data Set**.















MASTER DATA							
>> LIST GRAPH DETAILS							
★ Name ▾	Type	Subtype	Attributes	Description	My RASCI-VS	Modified Date	Status
	Master Data Set x						
	Attribute x						
unit price	Attribute	Integer				12-Sep-2017	Published
status	Attribute	String				12-Sep-2017	Published
Save order request return	Attribute	Boolean				12-Sep-2017	Published
quantity	Attribute	Integer				12-Sep-2017	Published
People Caring	Master Data Set					27-Sep-2017	Published
Order Data	Master Data Set					12-Sep-2017	Published
item no	Attribute	Integer				12-Sep-2017	Published
email	Attribute	String				12-Sep-2017	Published
date	Attribute	Data				12-Sep-2017	Published
Customer	Attribute	String				12-Sep-2017	Published
Current Prospects	Master Data Set					27-Sep-2017	Published
comment	Attribute	String				12-Sep-2017	Published
Amount	Attribute	Float				12-Sep-2017	Published

4.11.2.2 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.

MASTER DATA								
<div> <div>>></div> <div>LIST</div> <div>GRAPH</div> <div>DETAILS</div> </div>								
★ Name ▼	Type	Subtype	Attributes	Description	My RASCI-VS	Modified Date	Status	
	Attribute 							
	Master Data Set x							
 ☆ unit price	Attribute	Integer				12-Sep-2017	Published	
 ☆ status	Attribute	String				12-Sep-2017	Published	
 ☆ Save order request return	Attribute	Boolean				12-Sep-2017	Published	
 ☆ quantity	Attribute	Integer				12-Sep-2017	Published	
 ☆ People Caring	Master Data Set					27-Sep-2017	Published	
 ☆ Order Data	Master Data Set					12-Sep-2017	Published	
 ☆ Item no	Attribute	Integer				12-Sep-2017	Published	
 ☆ email	Attribute	String				12-Sep-2017	Published	
 ☆ date	Attribute	Data				12-Sep-2017	Published	
 ☆ Customer	Attribute	String				12-Sep-2017	Published	
 ☆ Current Prospects	Master Data Set					27-Sep-2017	Published	
 ☆ comment	Attribute	String				12-Sep-2017	Published	
 ☆ Amount	Attribute	Float				12-Sep-2017	Published	


4.11.2.2.3 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](#).

4.11.2.3 Quick Graph View

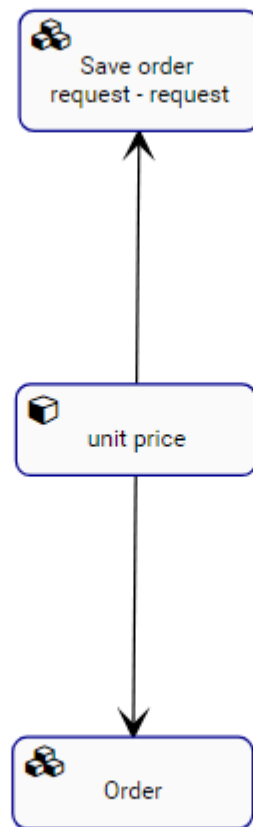
Quick Graph View is a feature of the EPC Web App that allows users to immediately view Master Data items in a graph mode. While Graph's will be further explained below, the Quick Graph View allows users to quickly navigate to a Graph from "List View".

Please see the instructions below:

1. Navigate to Master Data 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.

MASTER DATA								
>> LIST GRAPH DETAILS								
★	Name ▼	Type	Subtype	Attributes	Description	My RASCI-VS	Modified Date	Status
	☆ unit price	Attribute	Integer				12-Sep-2017	Published
	☆ status	Attribute	String				12-Sep-2017	Published
	☆ Save order request return	Attribute	Boolean				12-Sep-2017	Published
	☆ Save order request - response	Entity		1			12-Sep-2017	Published
	☆ Save order request - request	Entity		9			12-Sep-2017	Published
	☆ quantity	Attribute	Integer				12-Sep-2017	Published
	☆ People Caring	Master Data Set					27-Sep-2017	Published
	☆ Orders	Master Data Folder					12-Sep-2017	Published
	☆ Order Data	Master Data Set					12-Sep-2017	Published
	☆ Order	Entity		9		A	12-Sep-2017	Published
	☆ item no	Attribute	Integer				12-Sep-2017	Published
	☆ email	Attribute	String				12-Sep-2017	Published
	☆ date	Attribute	Data				12-Sep-2017	Published
	☆ Customer	Attribute	String				12-Sep-2017	Published
	☆ Current Prospects	Master Data Set					27-Sep-2017	Published
	☆ comment	Attribute	String				12-Sep-2017	Published
	☆ Amount	Attribute	Float				12-Sep-2017	Published

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.

4.11.3 Graph

Graphs are used as a visual representation of Master Data items. Graphs allow organizations and users to map out their Master Data items and provide key stakeholders with necessary information. They provide users with a high-level overview of Entities and Attributes, and how they are inter-related.

The following will be covered in the Graph section:

1. [Graph Navigation](#)
2. Graph Types ([Impact](#), [Hierarchy](#))

4.11.3.1 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 **Master Data**
3. By default, you will be directed to **List View** in the Master Data module.
4. Select any item on the list by clicking on the desired line of the item

MASTER DATA							
<div> <div>>></div> <div>LIST</div> <div>GRAPH</div> <div>DETAILS</div> </div>							
★	Name ▲	Type	Subtype	Attributes	Description	My RASCI-VS	Modified Date
☆	Amount	Attribute	Float				12-Sep-2017
☆	comment	Attribute	String				12-Sep-2017
☆	Current Prospects	Master Data Set					27-Sep-2017
☆	Customer	Attribute	String				12-Sep-2017
☆	date	Attribute	Data				12-Sep-2017
☆	email	Attribute	String				12-Sep-2017
☆	Invoice	Master Data Folder					27-Sep-2017
☆	item no	Attribute	Integer				12-Sep-2017
☆	Order	Entity		9		A	12-Sep-2017
☆	Order Data	Master Data Set					27-Sep-2017
☆	Orders	Master Data Folder					12-Sep-2017
☆	People Caring	Master Data Set					27-Sep-2017
☆	quantity	Attribute	Integer				12-Sep-2017
☆	Save order request - request	Entity		9			12-Sep-2017
☆	Save order request - response	Entity		1			12-Sep-2017
☆	Save order request return	Attribute	Boolean				12-Sep-2017
☆	Shipping	Master Data Folder					27-Sep-2017
☆	status	Attribute	String				12-Sep-2017
☆	unit price	Attribute	Integer				11-Oct-2017

«

<

1

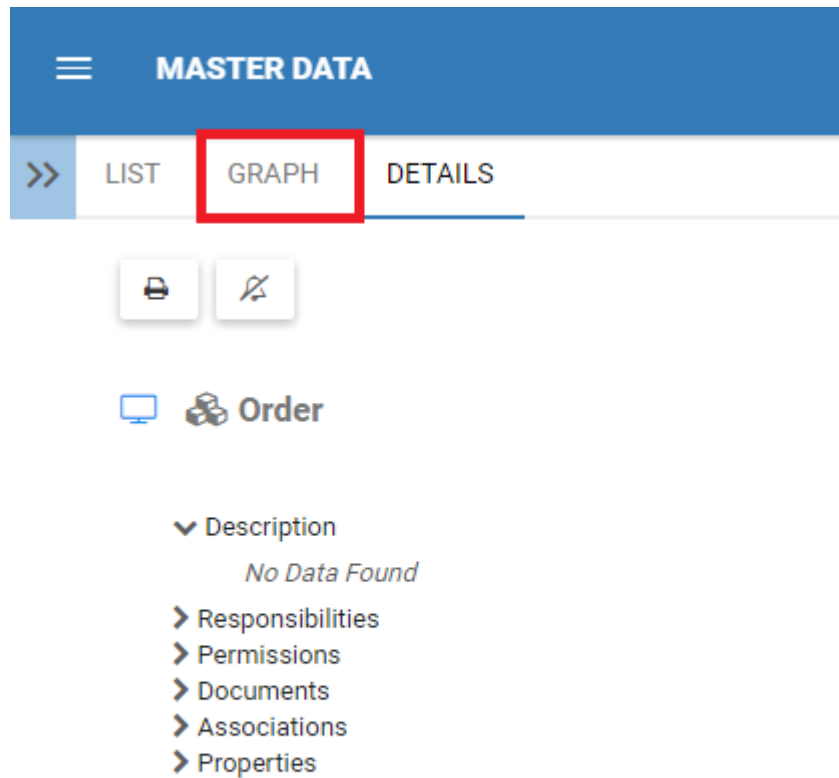
>

»

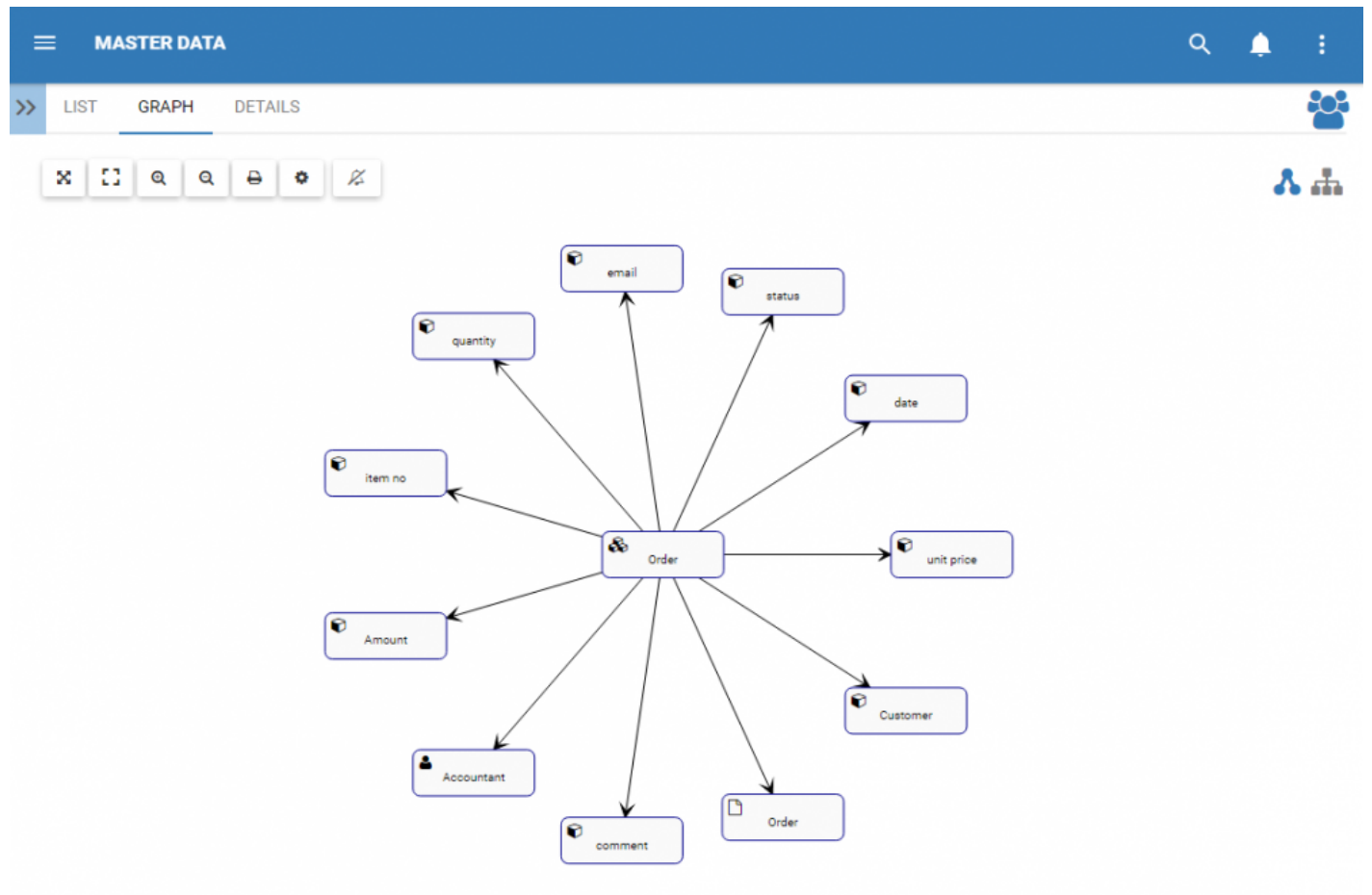
Show: 10 - 25 - 50

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

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

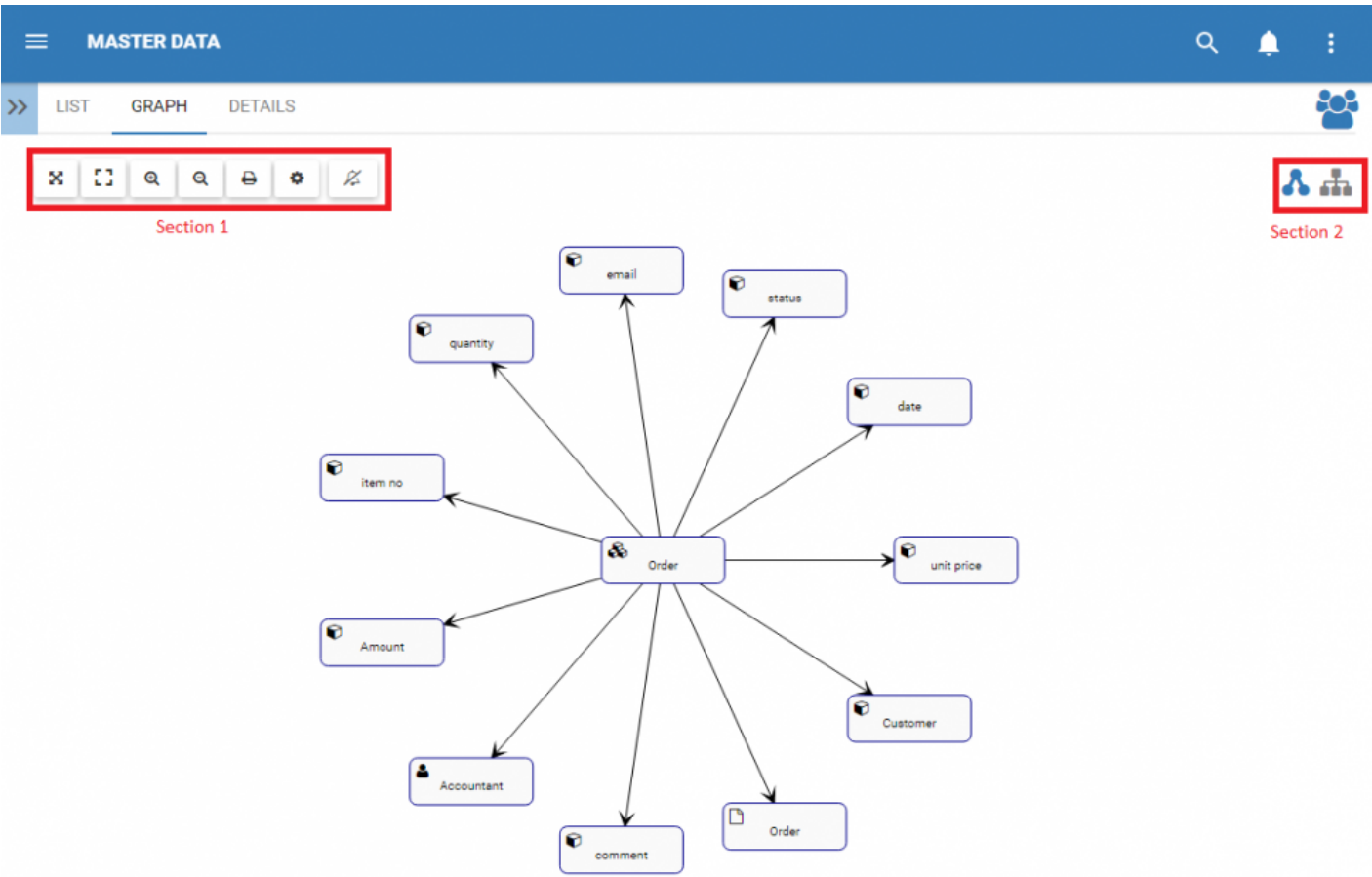


7. You will be navigated to the Graph section. By default, users will be sent to Impact view as the default Graph view. An example of this view can be seen below.








4.11.3.1.1 Navigation 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
Options		This button will allow a user to modify the settings associated with their Graphs
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.

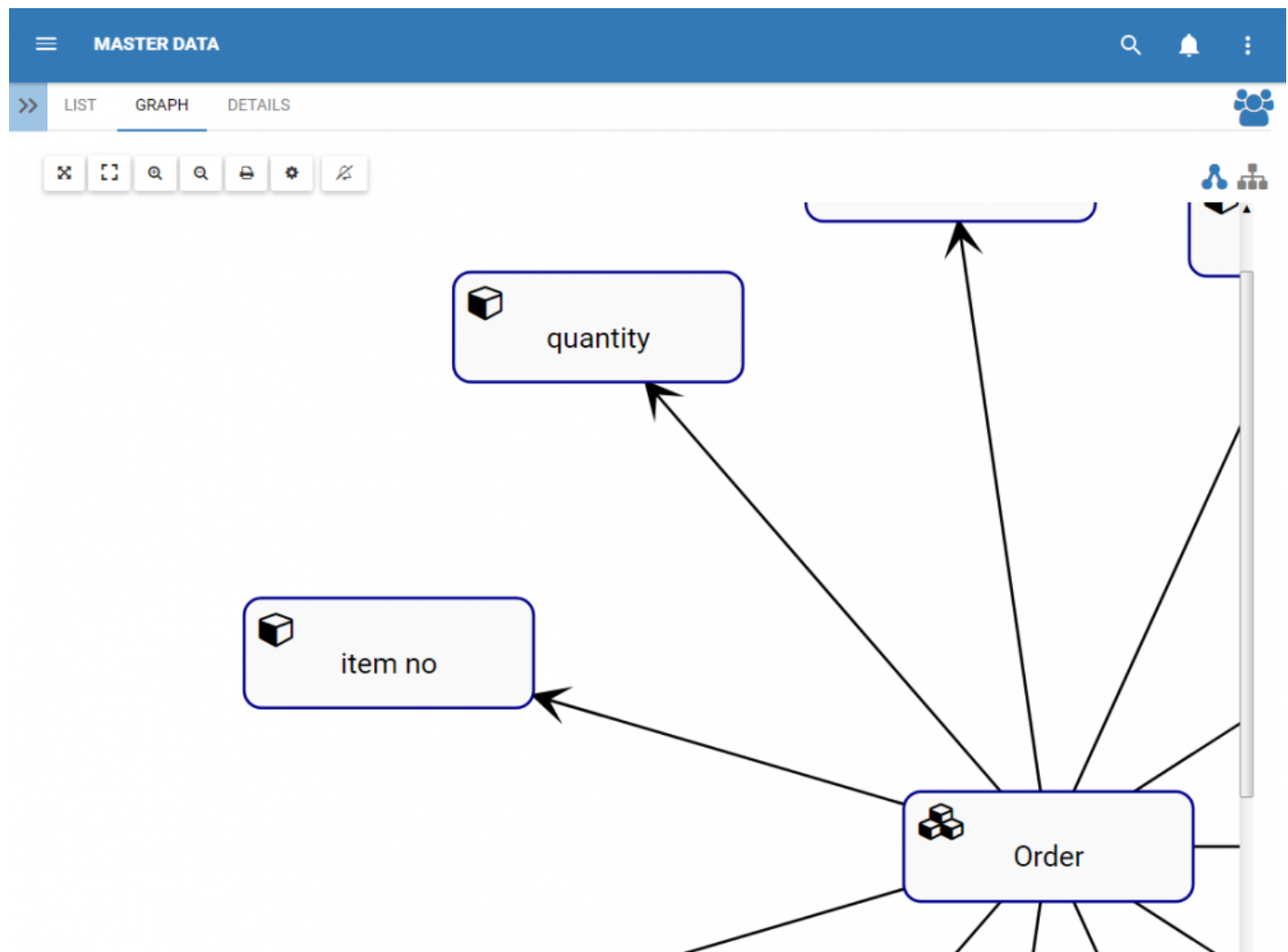
Item	Icon	Description
Impact Graph		Graph showing downstream representation of associated items
Hierarchy Graph		Graph showing a top-down view of items and how they fit within organizations


4.11.3.1.1 Fit Screen

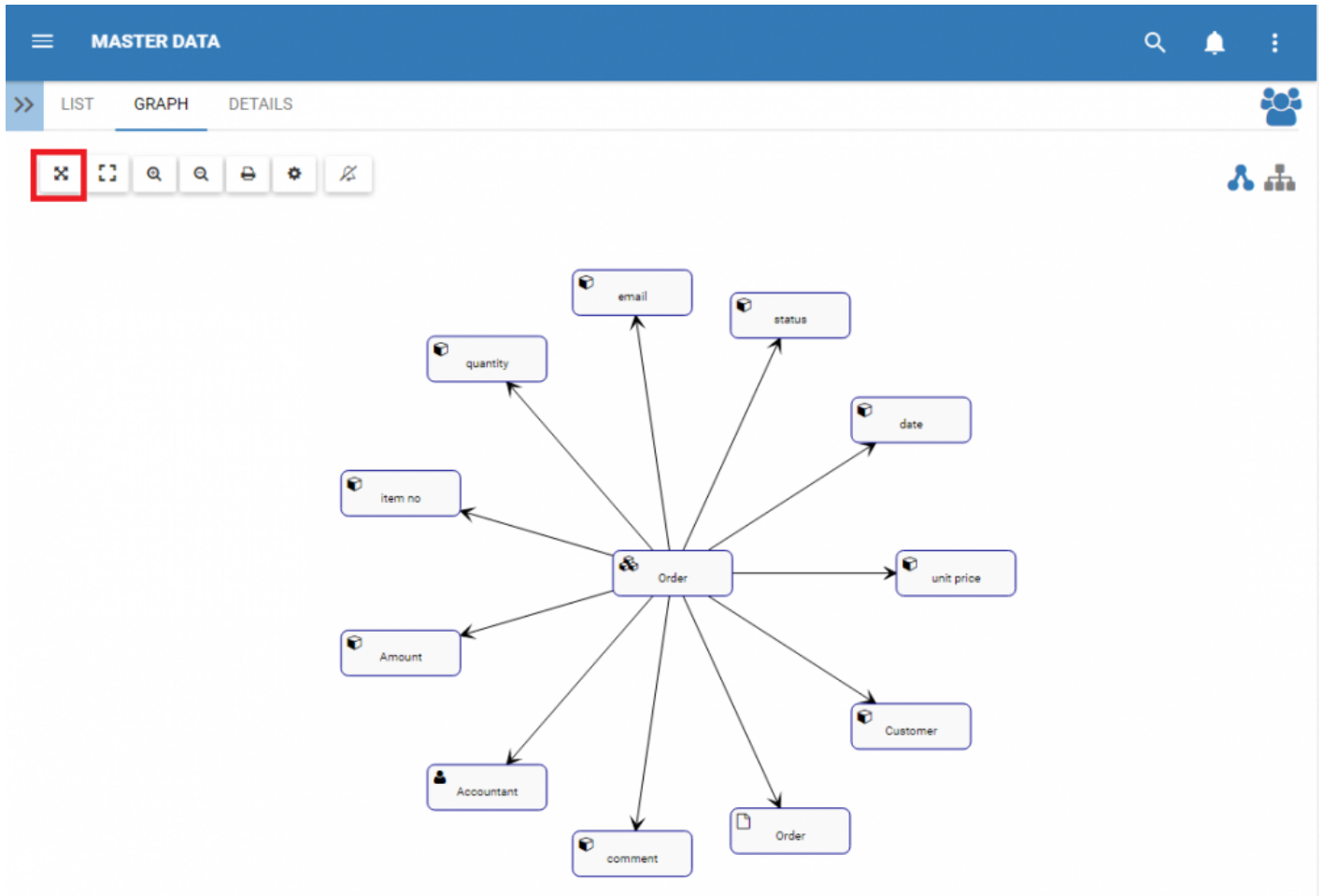
The fit screen function has been implemented to assist users at replacing and re-centering performance graphs.

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

1. Navigate to an Attribute within the Master Data Module
2. Click on the [Quick Graph View](#) icon 
3. Alter the Graph (Zoom in, out or shift). Please see [zoom in](#) instructions below for further details.





4. Click on button  and the page will be reset

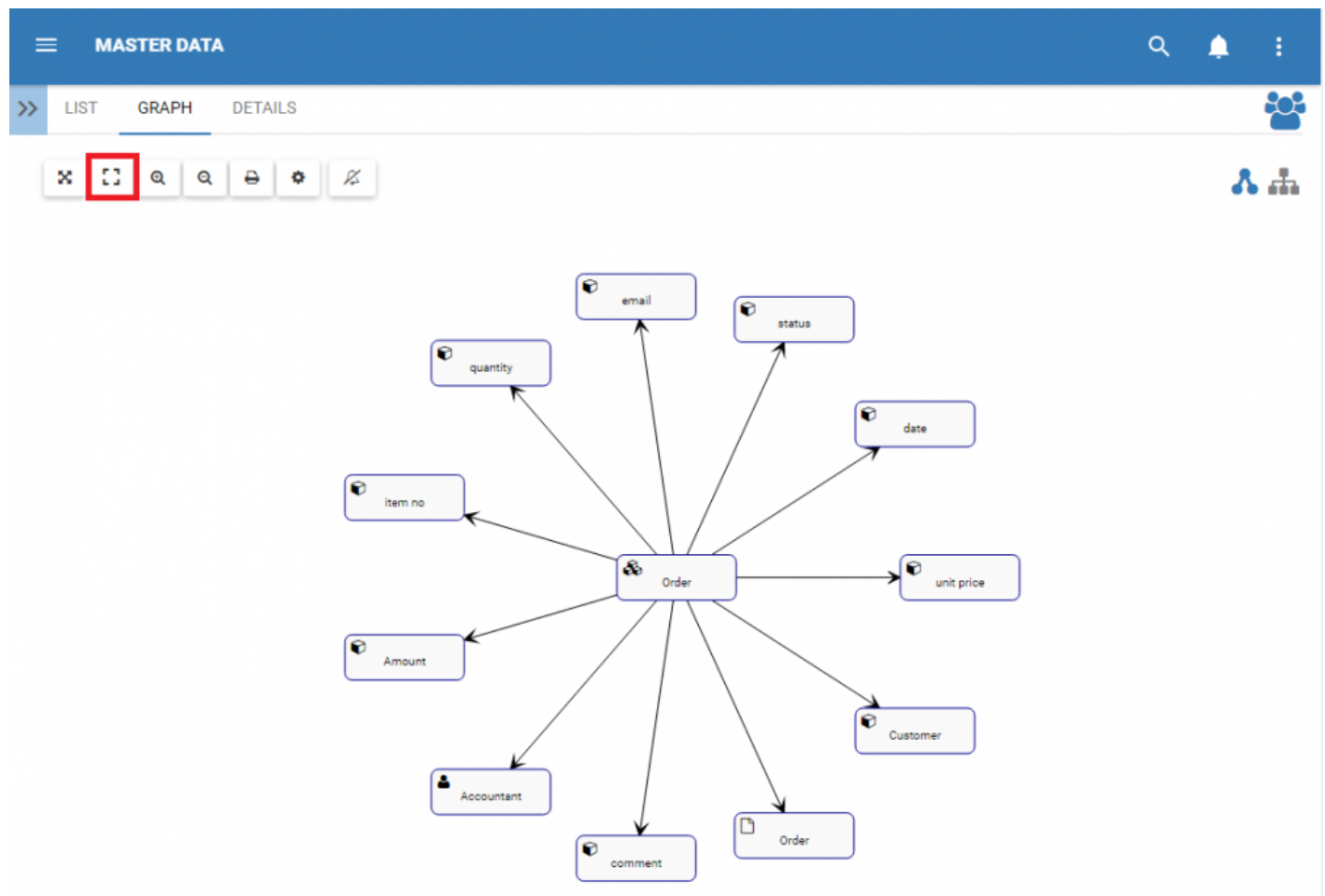




4.11.3.1.1.2 Full Screen

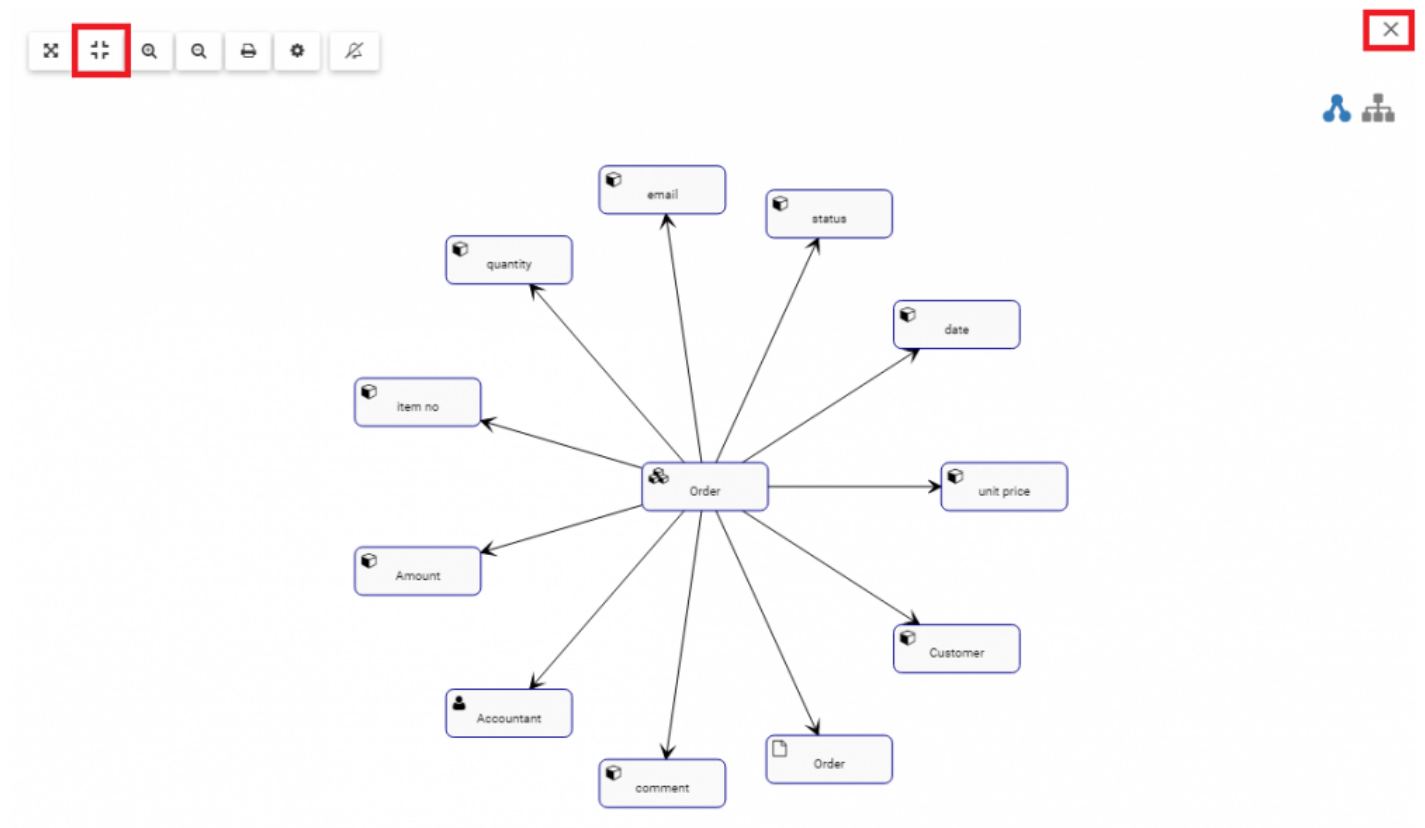
The fit screen function has been implemented to assist users at viewing Master Data items, utilizing the full screen of a user.

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

1. Navigate to an Attribute within the Master Data 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  or  on the upper right corner



4.11.3.1.1.3 Zoom in

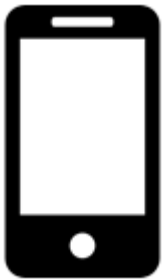
The zoom function has been implemented to assist users in viewing specific items within selected Master Data items.

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

1. Navigate to a Master Data item within the Master Data 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.

4.11.3.1.1.4 Zoom Out

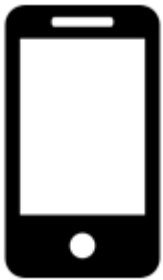
The zoom function has been implemented to assist users in viewing specific items within selected Master Data items.

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

1. Navigate to a Master Data item within the Master Data 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

4.11.3.1.1.5 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 Master Data item within the Master Data 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

Print Settings ×

General

A Print Mode:

B Page Layout: **C** Page Size:

Multi page print only

D Graph Layout:

Close

Print

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 b. Legal	8.5 × 11.0 in (216 × 279 mm) 8.5 × 14.0 in (216 × 356 mm)

	c. A3 d. A4	11.7 × 16.54 in (297 × 420 mm) 8.3 × 11.7 in (210 × 297 mm)
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

Print Settings ×

General

Print Mode:

Single Page

Page Layout:

Landscape

Page Size:

Letter

Multi page print only

Graph Layout:

Left to Right

Close

Print

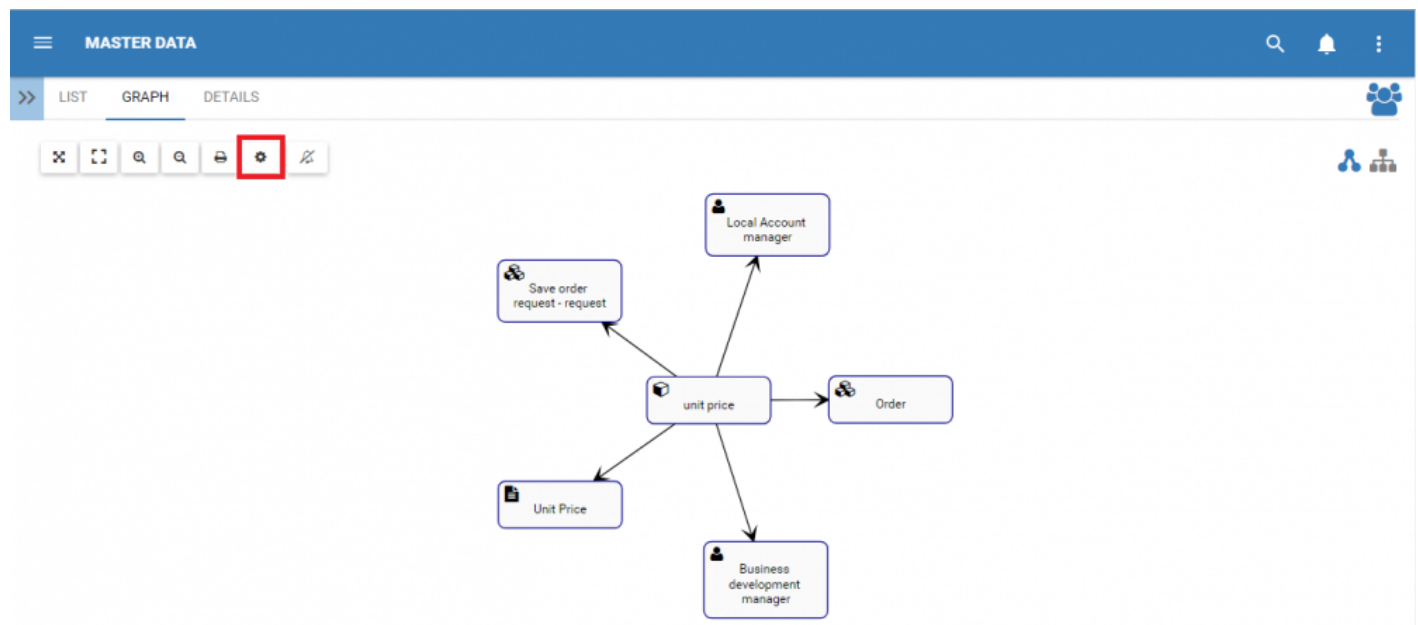
4.11.3.1.1.6 Options

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.

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




Map options ×

General —

Filter: ASSET, ATTRIBUTE, CI ▼

Reset to Default **Close** **Save changes**

To customize the graph and use the Filter option, please see the steps below:

1. Select “Options” icon 
2. Navigate cursor to “Asset, Attribute”



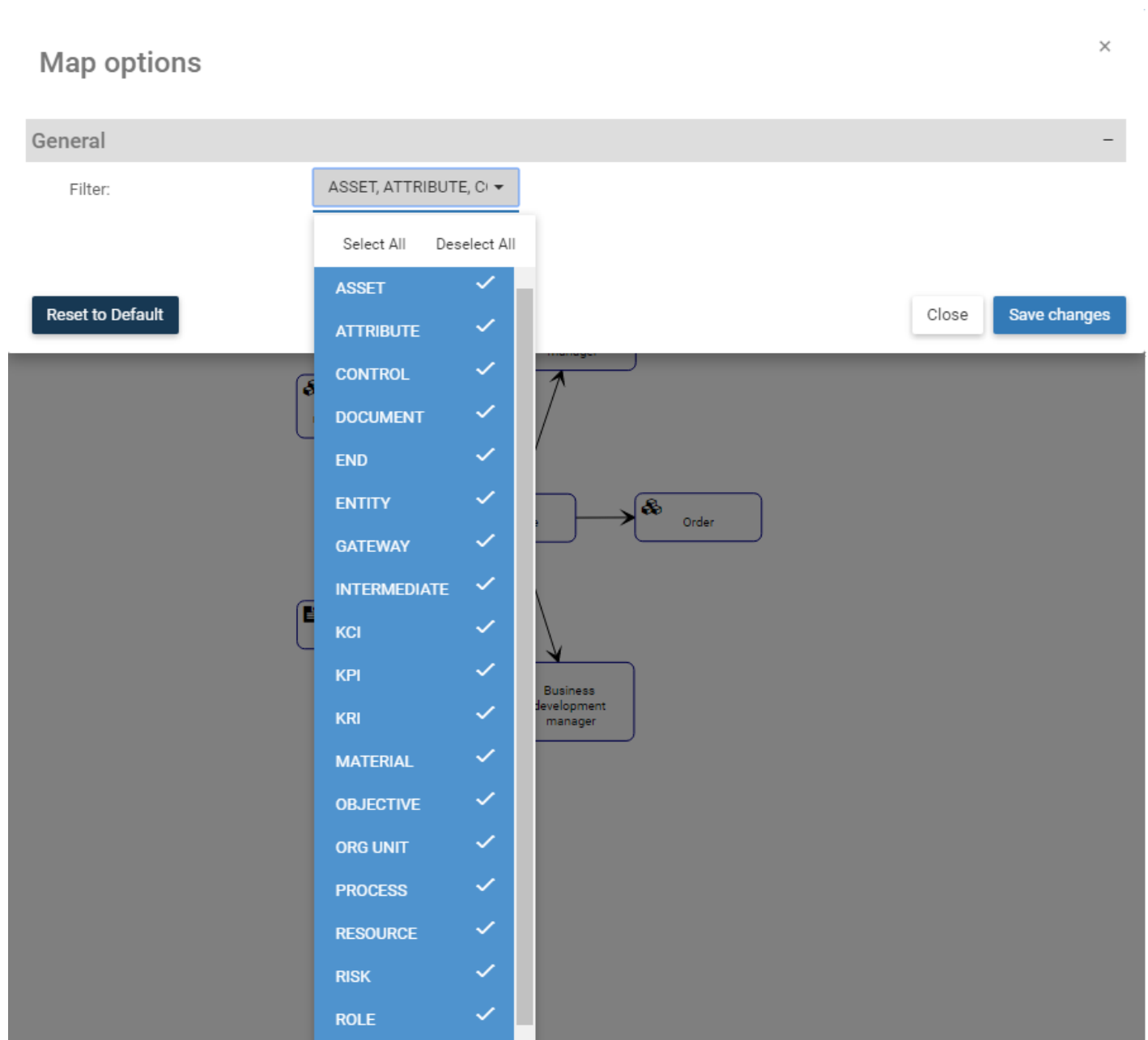
Map options ×

General —

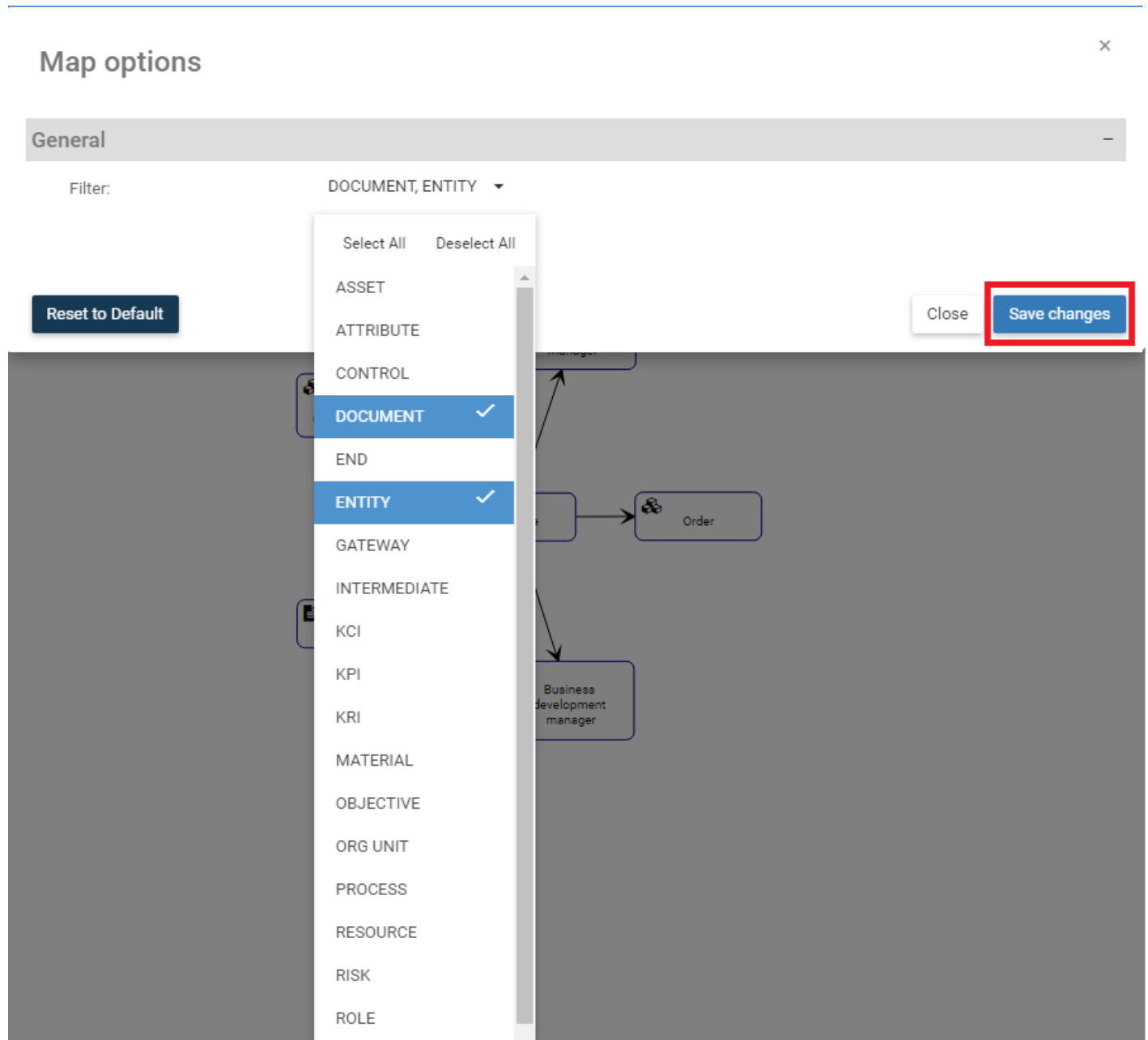
Filter: **ASSET, ATTRIBUTE, CI ▼**

Reset to Default **Close** **Save changes**

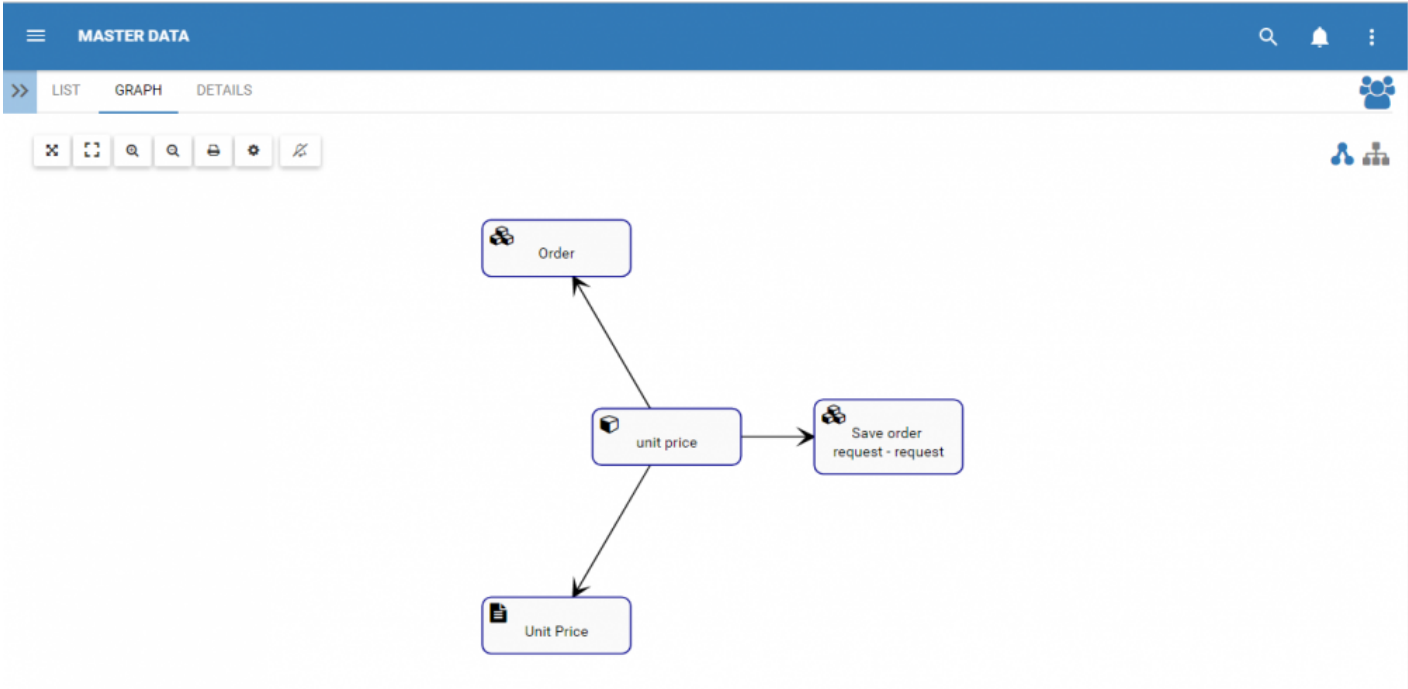
3. The following drop-down menu will be generated




4. Select the desired filter and “Save Changes”. For this example, we will select **Entity** and **Document**



6. The following graph will be generating showing only the **Entities** and **Documents** that are related to the specific **Attribute**






4.11.3.1.1.7 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.

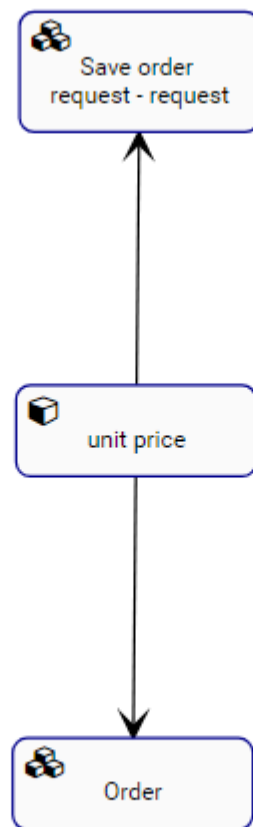
To use the Subscribe button, please see the following instructions.

1. Navigate to a Master Data item within the Master Data 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.

4.11.3.2 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

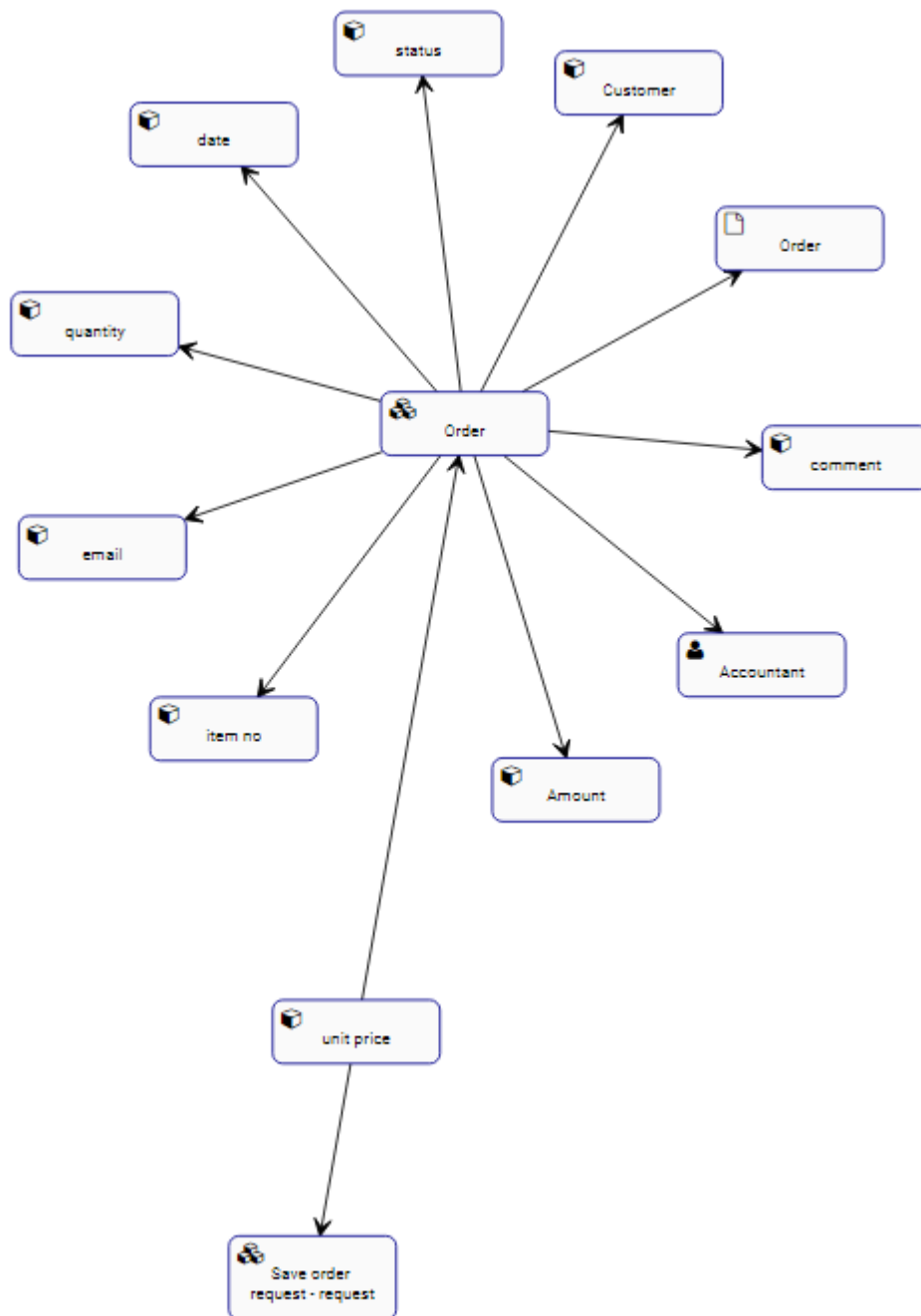


The example features the Impact Graph of the Attribute “Unit Price.” The Attribute is attached to two Entities “Order” and “Save order request – request”

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.

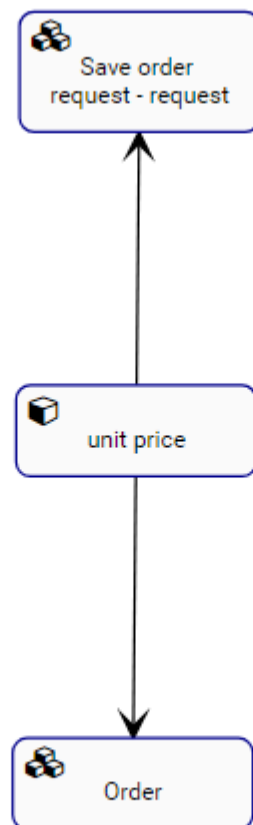


These Impact Graphs can be used to educate business users, to analyze internal business processes and help management optimize activities effectively. Additionally, they help in the preparation of change management plans, allowing managers to map out the effect of any organizational change

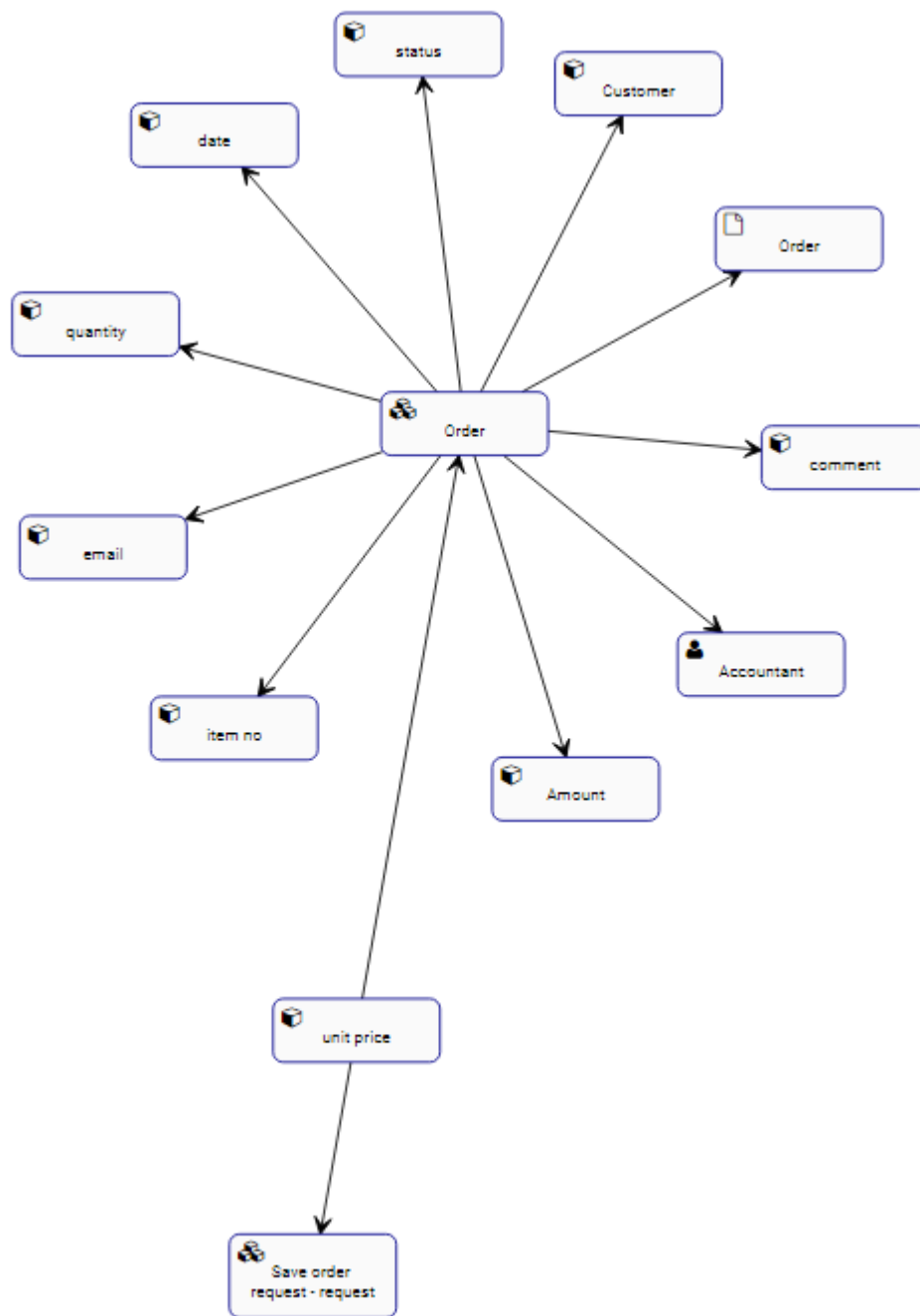
Impact Graph Navigation

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

1. Navigate to an Attribute within the Master Data Module
2. Click on the [Quick Graph View](#) icon 
3. You will be navigated to the specific item's Impact Graph



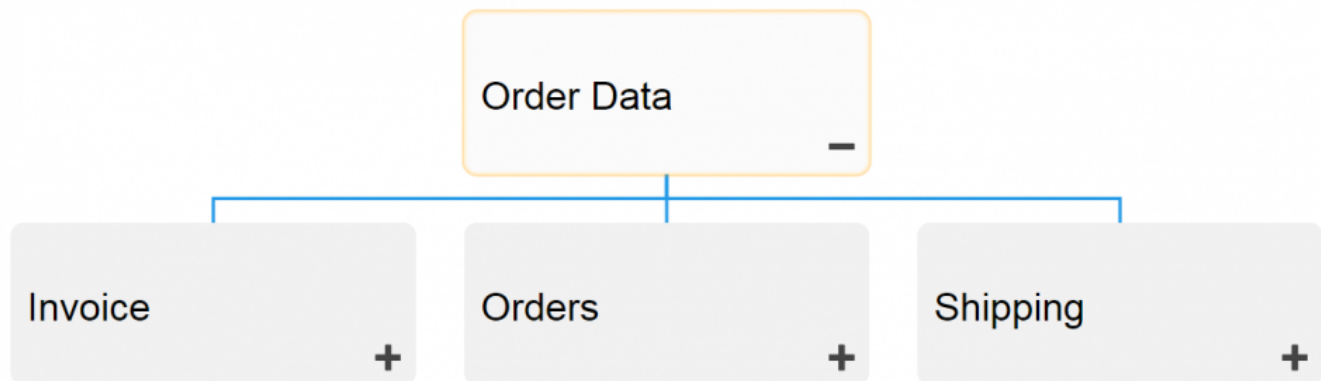
4. (Optional) To further expand the Impact Graph, simply double-click on the item to which you would like to display



4.11.3.3 Hierarchy Graph

Hierarchy Graphs allows users to view the vertical and horizontal hierarchy of Master Data Sets and Master Data Folders. This view provides users with a graphical representation of where specific Master Data Sets and Master Data Folders fit within the overall organization. This allows organizational users to understand organizational Entities and Attributes 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 Master Data Module
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 “Master Data Folders or Master Data Sets” in List View


3. Select the [Quick Graph View](#) icon  of the desired item

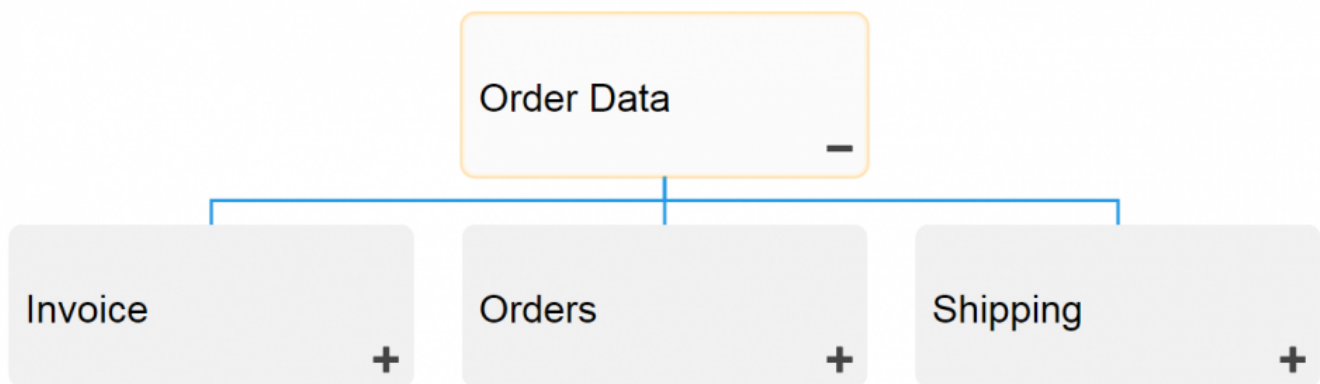
4. Please select the Hierarchy Graph icon 

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


Order Data



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.

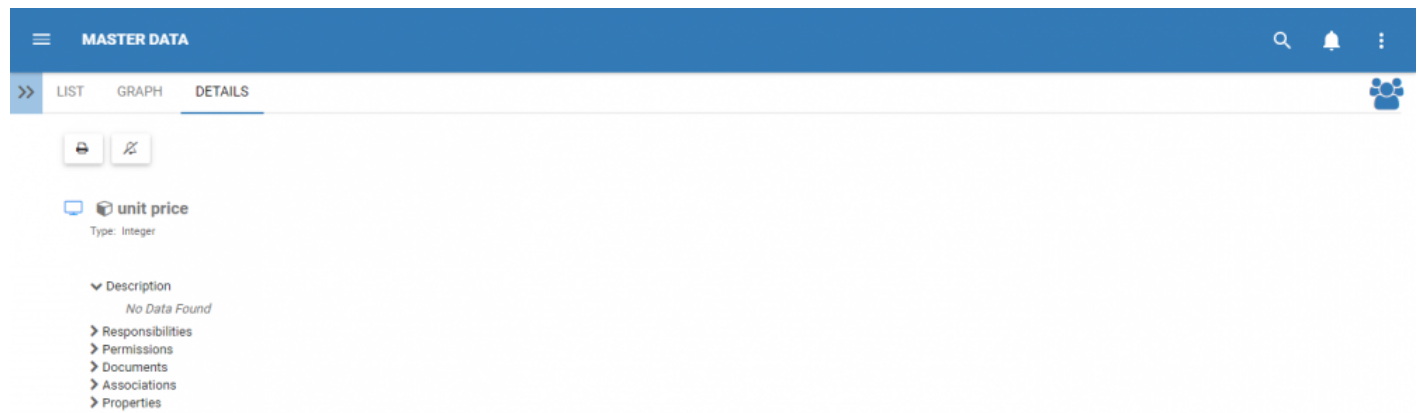
8. To close opened items, double-click on the  icon



4.11.4 Details

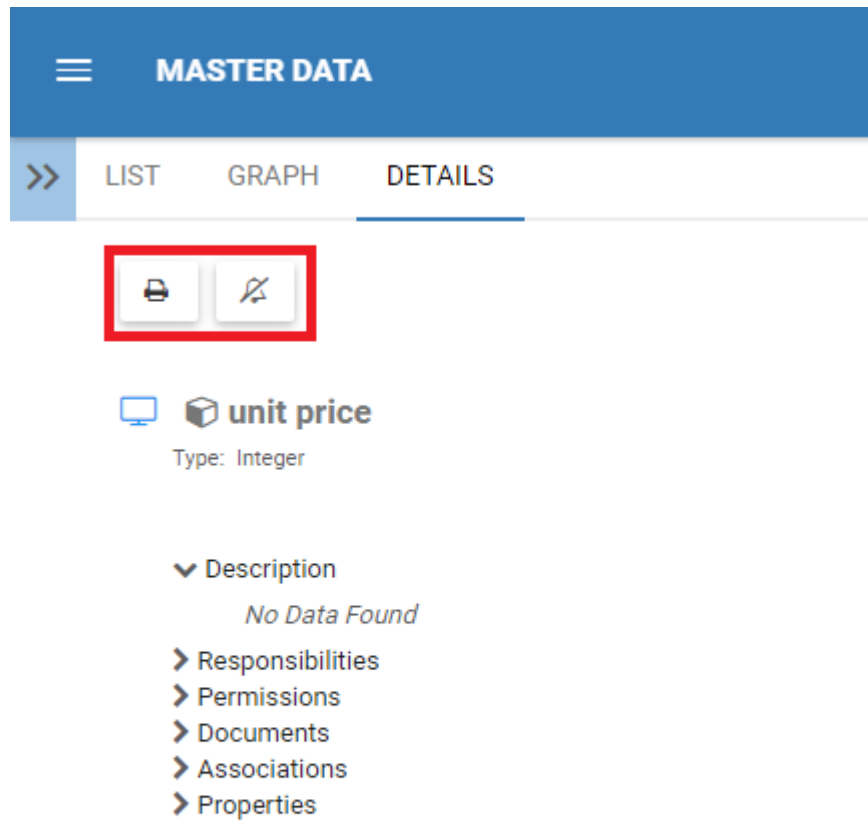
The Description section is where you will find details about the Master Data folders, Master Data Sets, Entities or Attributes you are observing. This rich text area allows for the display of all additional details that has been uploaded regarding the item in particular. These details provide users with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

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






4.11.4.1 Navigation

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



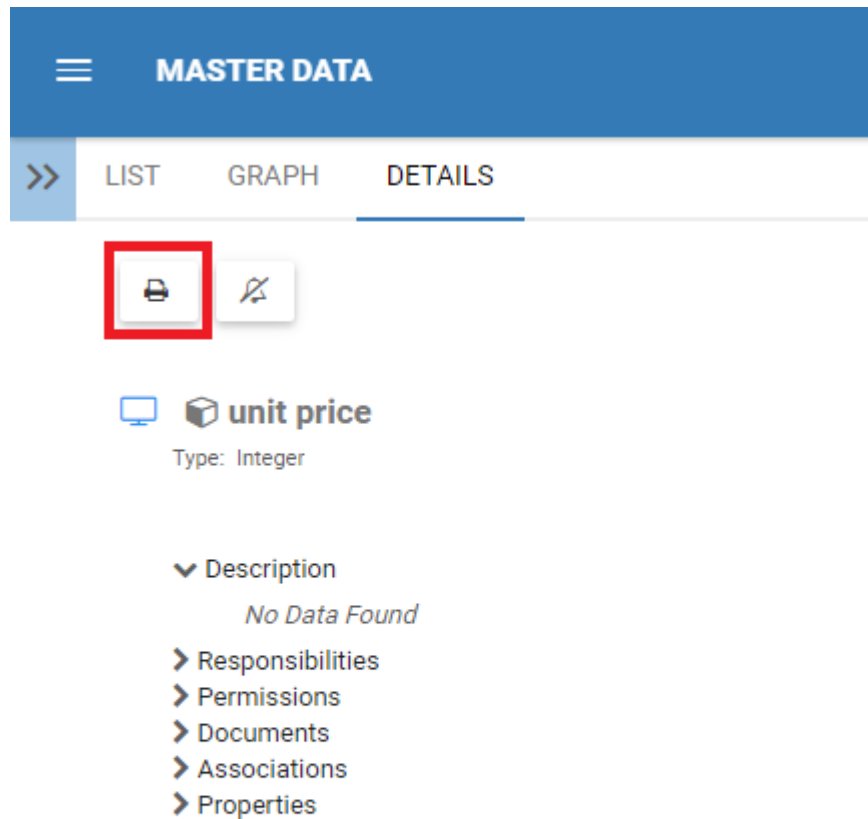
4.11.4.1.1 Toolbar

The toolbar on the Master Data Module 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 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.



4.11.4.1.1.1 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.



4.11.4.1.1.2 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 Master Data items to simplify and centralize monitoring activities. By subscribing to items, users will receive notifications when rules are altered or optimized, as well when another user collaborates or comments on the Master Data item. Additionally, a widget in the Home Page can be created with all the item the user subscribed to.

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


4.11.4.2 Attributes

Users can find a variety of information about objects within the details section. This information allows users to fully understand all information about a specific Entity and Attribute providing users with a specific destination that can be used to see and gather all relevant information.

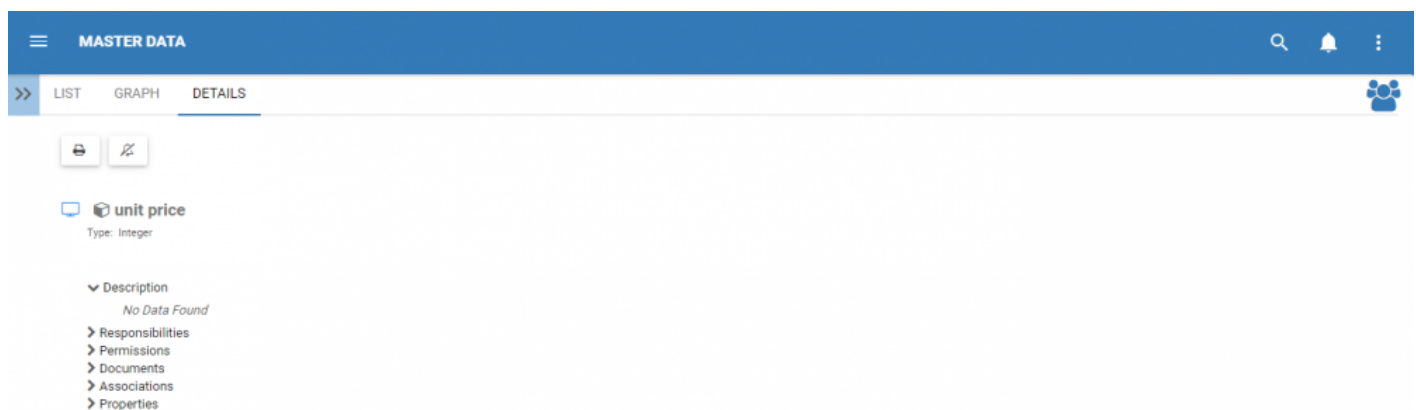
Master Data Details display the following content

1. [Description](#)
2. [Responsibilities](#)
3. [Permission](#)
4. [Documents](#)
5. [Associations](#)
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 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

4.11.4.2.1 Description

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

The screenshot displays the 'MASTER DATA' section of a web application. At the top, there is a blue header with a hamburger menu icon and the text 'MASTER DATA'. Below this is a navigation bar with three tabs: 'LIST', 'GRAPH', and 'DETAILS'. The 'DETAILS' tab is currently selected and underlined. Under the tabs, there are two icons: a printer icon and a refresh icon. Below these icons, the entity 'unit price' is shown with a computer monitor icon and a cube icon. Below the entity name, it says 'Type: Integer'. A red rectangular box highlights the 'Description' section, which contains a dropdown arrow and the text 'Description'. Below this, the text 'No Data Found' is displayed. At the bottom, there is a list of expandable sections: 'Responsibilities', 'Permissions', 'Documents', 'Associations', and 'Properties', each preceded by a right-pointing chevron.

MASTER DATA

>> LIST GRAPH DETAILS

Print Refresh

unit price
Type: Integer

▼ Description
No Data Found

- > Responsibilities
- > Permissions
- > Documents
- > Associations
- > Properties

4.11.4.2.2 Responsibilities

The Responsibilities section displays the roles, resources and/or assets that are responsible for the Entity or Attribute 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.

The screenshot shows a web application interface for 'MASTER DATA'. At the top is a blue header with a hamburger menu icon and the text 'MASTER DATA'. Below the header is a navigation bar with three tabs: 'LIST', 'GRAPH', and 'DETAILS'. The 'DETAILS' tab is selected and underlined. Below the navigation bar are two icons: a printer icon and a refresh icon. The main content area displays the entity 'unit price' with a computer monitor icon and a cube icon. Below the entity name is the text 'Type: Integer'. A list of expandable sections follows: 'Description', 'Responsibilities' (which is expanded and highlighted with a red box), 'Roles', 'Permissions', 'Documents', 'Associations', and 'Properties'. Under the expanded 'Responsibilities' section, there is a sub-section 'Roles' which contains a list item 'Local Account manager [R]' preceded by a person icon.

MASTER DATA

>> LIST GRAPH DETAILS

Print Refresh

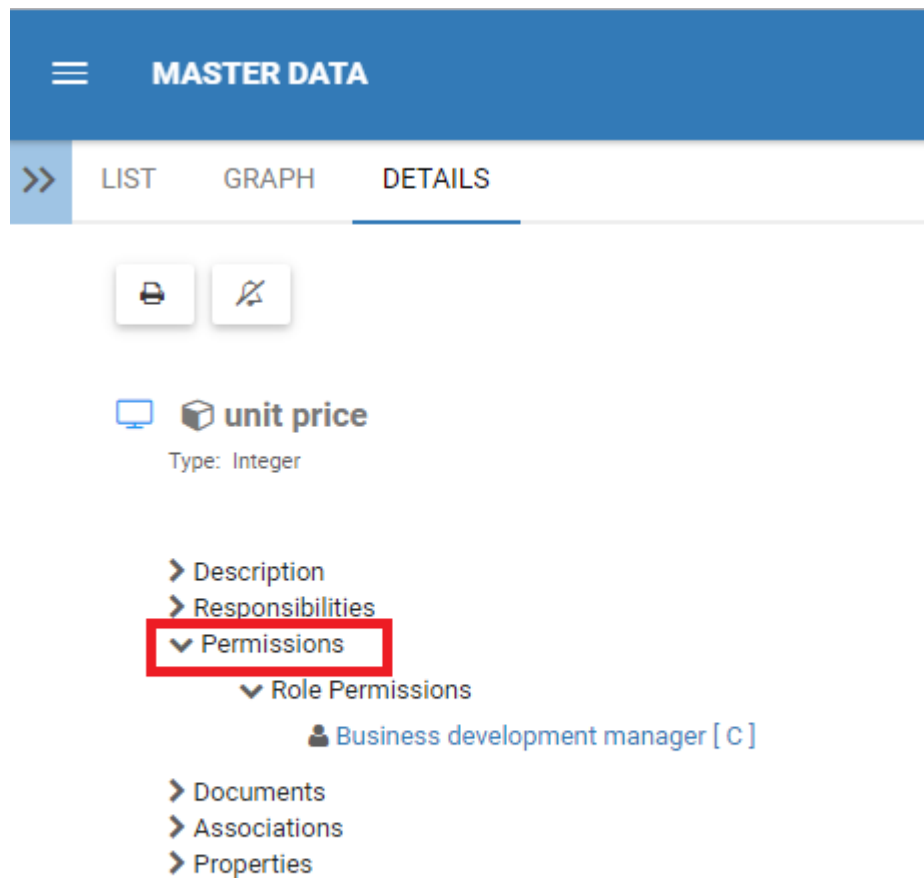
unit price
Type: Integer

- > Description
- ▼ Responsibilities
 - ▼ Roles
 - Local Account manager [R]
- > Permissions
- > Documents
- > Associations
- > Properties

4.11.4.2.3 Permission

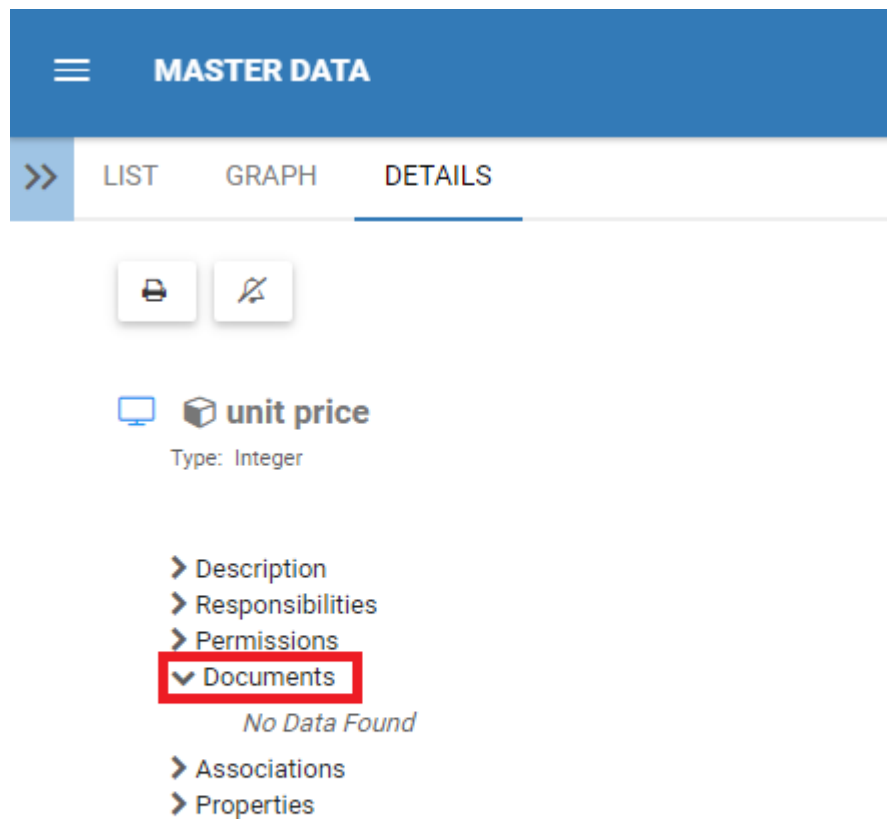
The Permission section displays the roles that have permissions for the Entity or Attribute you are viewing. The user can view which CRUD function was given to the role, either the permission to create, read, update and/or delete.

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.



4.11.4.2.4 Documents

This section lists all documents that have tied to the Master Data item being viewed. This provides users with a list of relevant documents, as well as 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.


▼ Documents

 [Interest Questionnaire \(DOCX\)](#)  



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 • 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
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](#) .

4.11.4.2.5 Associations

The Associations section displays Master Data items (Entities, in this example) and Rules associated to a specific Attribute.

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.

The screenshot shows a web application interface for 'MASTER DATA'. At the top, there is a blue header with a hamburger menu icon and the text 'MASTER DATA'. Below the header, there is a navigation bar with three tabs: 'LIST', 'GRAPH', and 'DETAILS'. The 'DETAILS' tab is currently selected. Below the navigation bar, there are two icons: a printer icon and a share icon. The main content area displays the attribute 'unit price' with a monitor icon and the text 'Type: Integer'. Below this, there is a list of expandable sections: 'Description', 'Responsibilities', 'Permissions', 'Documents', 'Associations', 'Entities', 'Rules', and 'Properties'. The 'Associations' section is expanded, showing a list of associated items: 'Order' and 'Save order request - request'. The 'Rules' section is also expanded, showing the text 'No Data Found'.

MASTER DATA

>> LIST GRAPH DETAILS

unit price
Type: Integer

- > Description
- > Responsibilities
- > Permissions
- > Documents
- ▼ **Associations**
 - ▼ Entities
 - [Order](#)
 - [Save order request - request](#)
 - ▼ Rules
 - No Data Found
- > Properties

4.11.4.2.6 Properties

The properties section provides users with additional key information about items. The properties section is broken down into two 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 screenshot shows a web application interface for 'MASTER DATA'. At the top is a blue header with a hamburger menu icon and the text 'MASTER DATA'. Below the header is a navigation bar with three tabs: 'LIST', 'GRAPH', and 'DETAILS'. The 'DETAILS' tab is selected and underlined. Below the navigation bar are two icons: a printer icon and a share icon. The main content area displays a blue monitor icon followed by the text 'unit price' and 'Type: Integer'. Below this is a list of expandable sections: 'Description', 'Responsibilities', 'Permissions', 'Documents', 'Associations', and 'Properties'. The 'Properties' section is expanded, showing two sub-sections: 'Version' and 'Analysis'. The 'Version' section displays 'Version Number: 1.02' and 'Last Modified: 14 minutes ago'. The 'Analysis' section displays 'No Data Found'.

MASTER DATA

>> LIST GRAPH DETAILS

Print Share

unit price
Type: Integer

- > Description
- > Responsibilities
- > Permissions
- > Documents
- > Associations
- ▼ Properties
 - ▼ Version
 - Version Number: 1.02
 - Last Modified: 14 minutes ago
 - ▼ Analysis
 - No Data Found

4.12 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.

4.12.1 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

4.12.1.1 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:

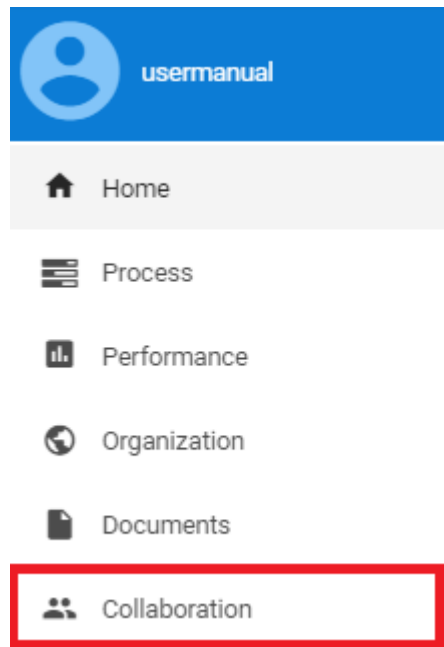
Item	Description
Type	Displays the type of collaboration activity being undertaken (Discussion, Question, Incident, Improvement Requests)
Subject	The subject of the collaboration engagement, created by the initiator of the collaboration
Replies	A numerical representation of the amount of replies regarding 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**.

COLLABORATION									
LIST									
Favorite	Type	Subject	Replies	Status	Priority	Object Name	Object Type	Last Modified by	Modified Date
☆	Discussion	bvbw	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	wewew	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

4.12.1.1.1 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.

COLLABORATION									
LIST									
Favorite	Type	Subject ▲	Replies	Status	Priority	Object Name	Object Type	Last Modified by	Modified Date
☆	Discussion	bvvv	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.

COLLABORATION									
LIST									
Favorite	Type	Subject	Replies	Status	Priority	Object Name	Object Type	Last Modified by	Modified Date
☆	Improvement Request	Ajouter une tache	2	Open	Normal	BP01 Facturer	Process	Administrator	07-Sep-2016
☆	Improvement Request	Attach-1	0	Open	Major	Navig processC	Process	User Thirtyone	26-Feb-2017
☆	Improvement Request	Attach-1	0	Open	Major	Navig processC	Process	User Thirtyone	26-Feb-2017
☆	Improvement Request	Attach-3	0	Open	Major	Navig processC	Process	User Thirtyone	26-Feb-2017
☆	Improvement Request	Attach-4	0	Open	Minor	Navig processC	Process	User Thirtyone	26-Feb-2017
☆	Discussion	bvvv	0	Open	Critical	New KCI	KCI	User Nineteen	21-Apr-2017
☆	Discussion	Discussion on Food	1	Closed	Critical	Start it	Start	Jay902 Punjabi902	26-Feb-2017
☆	Discussion	Discussion Role Test-1	0	Open	Major	Confirmation of Appointment1...	Process	Jay502 Punjabi502	28-Feb-2017
☆	Discussion	Discussion Test-1	1	Open	Normal	Confirmation of Appointment1...	Process	Jay702 Punjabi702	28-Feb-2017
☆	Discussion	dvvd	0	Open	Normal	1-COMMANDER	Process	User Seventeen	14-Feb-2017
☆	Question	f	0	Open	Minor	Cr��er demande intervention se...	Process	Jay502 Punjabi502	27-Mar-2017

✿ Multi-sorting (multiple columns) is available.

4.12.1.1.2 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](#)

4.12.1.1.2.1 Add filter

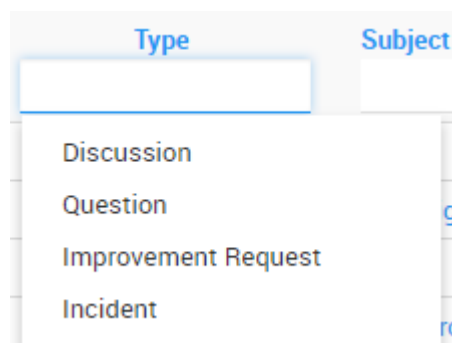
You can add filters to see items of your choice. **Type** what you are looking for, **select** the filter in the drop-down menu, or **define the range of dates**.

How to Add Filter

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

COLLABORATION									
LIST									
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

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.


COLLABORATION									
LIST									
Favorite	Type	Subject	Replies	Status	Priority	Object Name	Object Type	Last Modified by	Modified Date
	Discussion x								
	Question x								
☆	Discussion	bvvv	0	Open	Critical	New KCI	KCI	User Nineteen	21-Apr-2017
☆	Question	f	0	Open	Minor	Cr��rer demande intervention se...	Process	Jay502 Punjabi502	27-Mar-2017
☆	Discussion	Intermediate	0	Open	Major	Rappel RDV J-2	Intermediate	User FortyThree	28-Feb-2017
☆	Discussion	Implement-1	1	Closed	Major	2- IMPLEMENTER	Process	User FortyThree	28-Feb-2017
☆	Question	Question Indeed	1	Closed	Major	End1	End	User FortyThree	28-Feb-2017
☆	Discussion	Discussion Role Test-1	0	Open	Major	Confirmation of Appointment1...	Process	Jay502 Punjabi502	28-Feb-2017
☆	Discussion	Discussion Test-1	1	Open	Normal	Confirmation of Appointment1...	Process	Jay702 Punjabi702	28-Feb-2017
☆	Discussion	Gateway Discssoin-001	1	Closed	Major	Food Collaboration	Process	User Nineteen	26-Feb-2017
☆	Question	Question on Food	1	Closed	Major	Start it	Start	Jay902 Punjabi902	26-Feb-2017

4.12.1.1.2.2 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.

COLLABORATION									
LIST									
Favorite	Type	Subject	Replies	Status	Priority	Object Name	Object Type	Last Modified by	Modified Date
	Discussion × Question 								
☆	Discussion	bvbv	0	Open	Critical	New KCI	KCI	User Nineteen	21-Apr-2017
☆	Question	f	0	Open	Minor	Cr��r demande intervention se...	Process	Jay502 Punjabi502	27-Mar-2017
☆	Discussion	Intermediate	0	Open	Major	Rappel RDV J-2	Intermediate	User FortyThree	28-Feb-2017
☆	Discussion	Implement-1	1	Closed	Major	2- IMPLEMENTER	Process	User FortyThree	28-Feb-2017
☆	Question	Question Indeed	1	Closed	Major	End1	End	User FortyThree	28-Feb-2017
☆	Discussion	Discussion Role Test-1	0	Open	Major	Confirmation of Appointment1...	Process	Jay502 Punjabi502	28-Feb-2017
☆	Discussion	Discussion Test-1	1	Open	Normal	Confirmation of Appointment1...	Process	Jay702 Punjabi702	28-Feb-2017
☆	Discussion	Gateway Discssoin-001	1	Closed	Major	Food Collaboration	Process	User Nineteen	26-Feb-2017
☆	Question	Question on Food	1	Closed	Major	Start it	Start	Jay902 Punjabi902	26-Feb-2017


4.12.1.1.2.3 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.

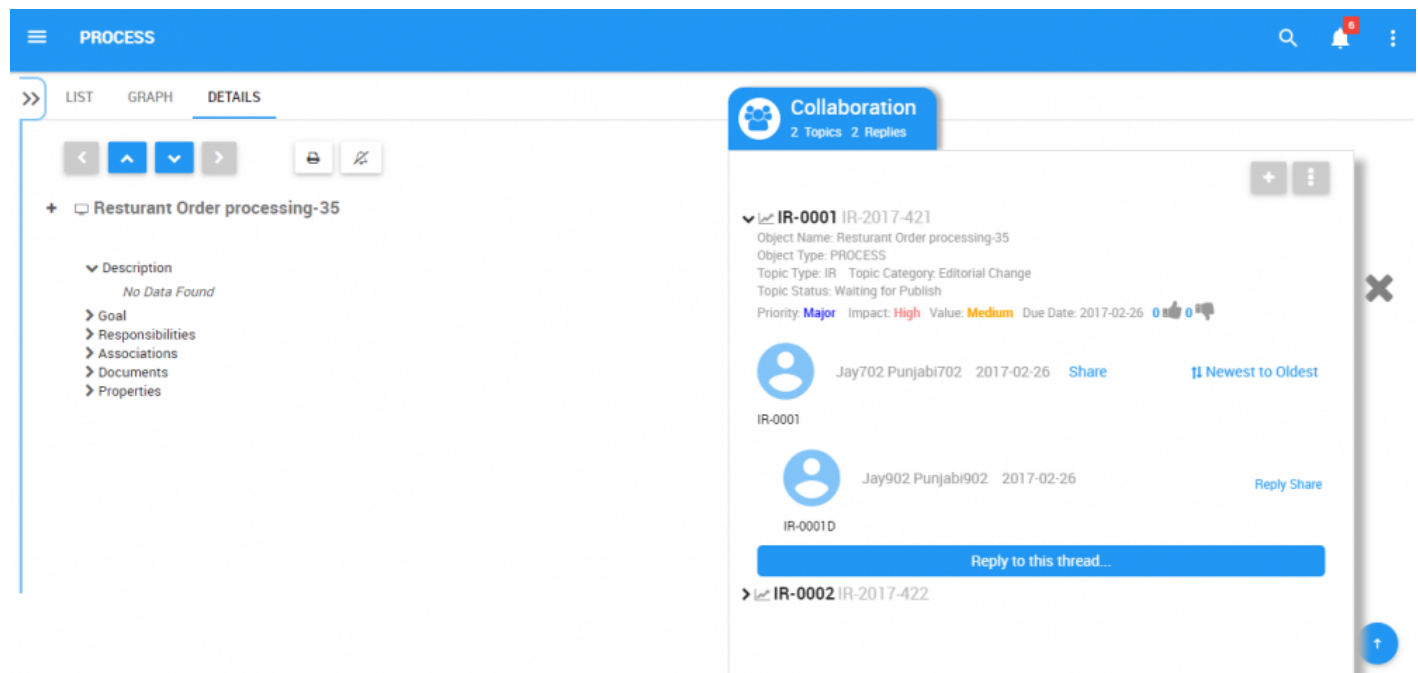
4.12.1.2 Item Pages

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 screenshot displays the 'PROCESS' item page in the EPC10 WebApp. The main interface shows a 'DETAILS' tab for the item 'Resturant Order processing-35'. A collaboration pop-up window is open on the right, titled 'Collaboration' with '2 Topics' and '2 Replies'. The pop-up displays a list of collaboration items, including 'IR-0001 IR-2017-421' and 'IR-0002 IR-2017-422'. The first item, 'IR-0001', is expanded, showing details such as 'Object Name: Resturant Order processing-35', 'Object Type: PROCESS', 'Topic Type: IR', 'Topic Category: Editorial Change', 'Topic Status: Waiting for Publish', 'Priority: Major', 'Impact: High', 'Value: Medium', and 'Due Date: 2017-02-26'. It also shows two replies from users 'Jay702 Punjabi702' and 'Jay902 Punjabi902' dated '2017-02-26'. The pop-up includes a 'Share' button, a 'Newest to Oldest' sort option, and a 'Reply to this thread...' button at the bottom.


The collaboration pop-up window features a variety of key information that users should be aware of:

A  **Collaboration**
2 Topics 2 Replies

B   **IR-0001** IR-2017-421
Object Name: Resturant Order processing-35
Object Type: PROCESS
Topic Type: IR Topic Category: Editorial Change
Topic Status: Waiting for Publish
Priority: **Major** Impact: **High** Value: **Medium** Due Date: 2017-02-26 0  0 


D  Jay702 Punjabi702 2017-02-26 [Share](#) [↕ Newest to Oldest](#)

IR-0001

 Jay902 Punjabi902 2017-02-26 [Reply](#) [Share](#)

IR-0001D

E [Reply to this thread...](#)

>  **IR-0002** IR-2017-422

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

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.

4.12.2 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.

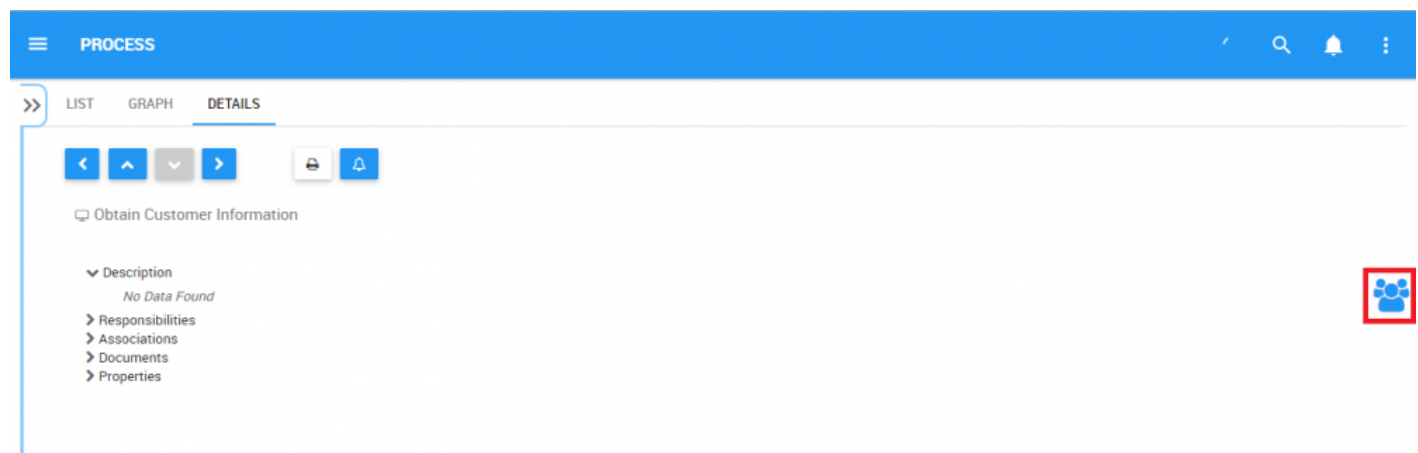
4.12.2.1 Initiating Collaboration

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).

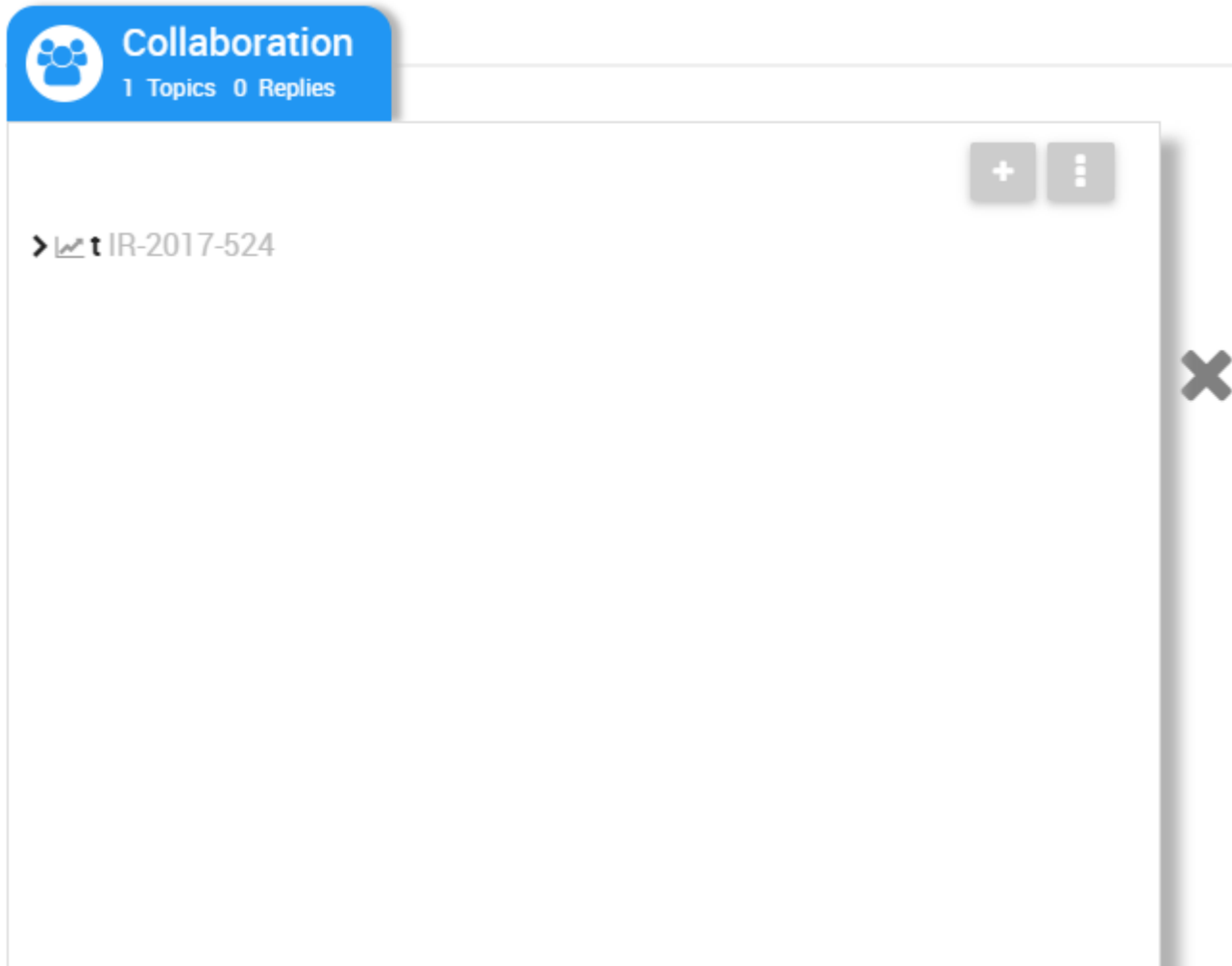
For further details on how to initiate a collaboration activity, please see the steps below:


1. Navigate to an item's Details page. For this example we will be selecting the "Obtain Customer Information" Task.

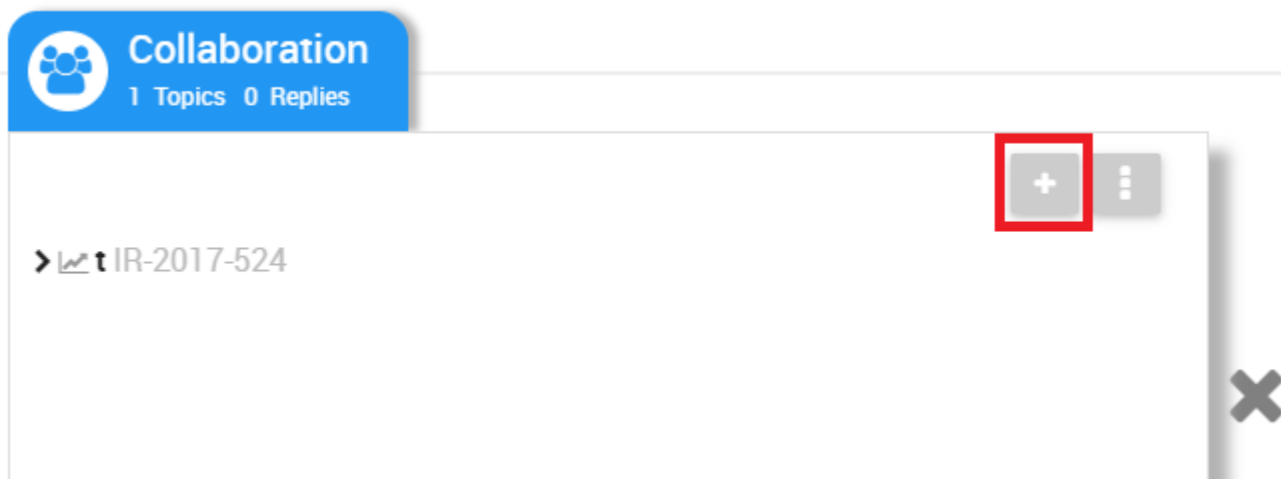
2. Select the  icon on the right side of the screen



3. Clicking on the icon will generate a pop-up window



4. Select the  icon at the top right corner of the page



5. This will generate a window where you will be asked to fill in a variety of fields pertaining to the collaboration engagement

Topic Type*

Subject*

Priority

Impact

Value

Due Date


2017-04-25

 Add a File

Description*

Cancel

Create

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.

Select Topic Type:

a. Select the **Topic Type** text bar

Topic Type*

Subject*


Priority

Impact

Value

Due Date

2017-04-25

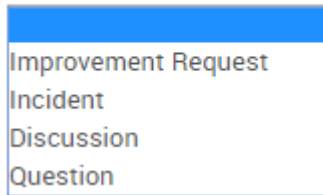
 Add a File

Description*

Cancel

Create

b. This will generate a drop-down menu with the following options

Topic Type*A screenshot of a dropdown menu. The top bar is blue. Below it, the following options are listed: Improvement Request, Incident, Discussion, and Question.

Improvement Request
Incident
Discussion
Question

c. Select the desired collaboration engagement

Enter Subject:

a. Navigate to the Subject text bar

Subject*A screenshot of a text input field with a red border.

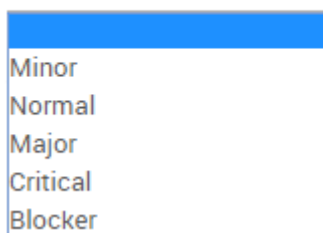
b. With your keyboard enter the desired subject

Select Priority:

a. Navigate to Priority text bar

PriorityA screenshot of a text input field with a red border.

b. This will generate a drop-down menu with the following options

PriorityA screenshot of a dropdown menu. The top bar is blue. Below it, the following options are listed: Minor, Normal, Major, Critical, and Blocker.

Minor
Normal
Major
Critical
Blocker

c. Select the desired priority rating

Select Impact:

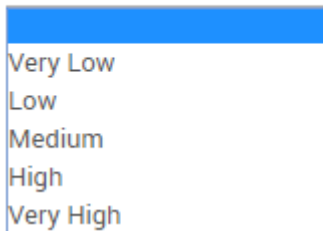
a. Navigate to Impact text bar

Impact



b. This will generate a drop-down menu with the following options

Impact



Impact
Very Low
Low
Medium
High
Very High

c. Select the desired priority rating

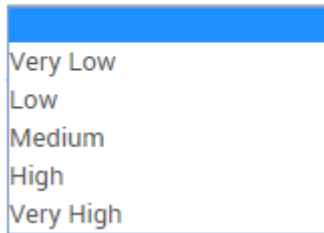
Select Value:

a. Navigate to Value text bar

Value



b. This will generate a drop-down menu with the following options

Value

Very Low
Low
Medium
High
Very High

c. Select the desired priority rating

Select Due Date:

a. Navigate to Due Date text bar

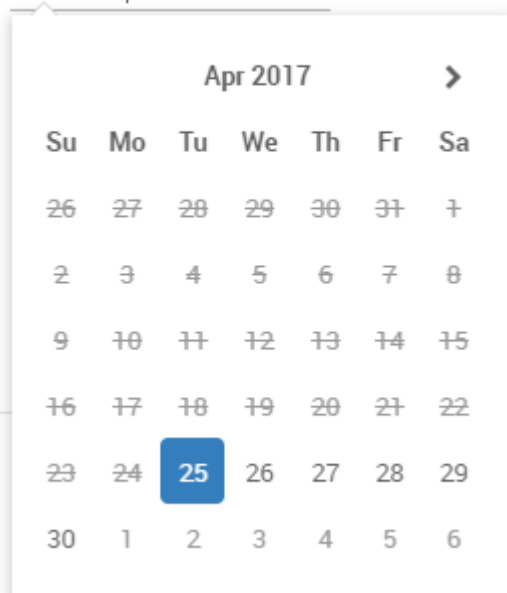
Due Date

2017-04-25

b. This will generate a drop-down menu with calendar

Due Date

2017-04-25




Apr 2017 >

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

c. Select the desired due date

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

Description *



- 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

4.12.2.2 Participating in Collaboration

Users can participate in collaboration engagements in a variety of facets. Users can:

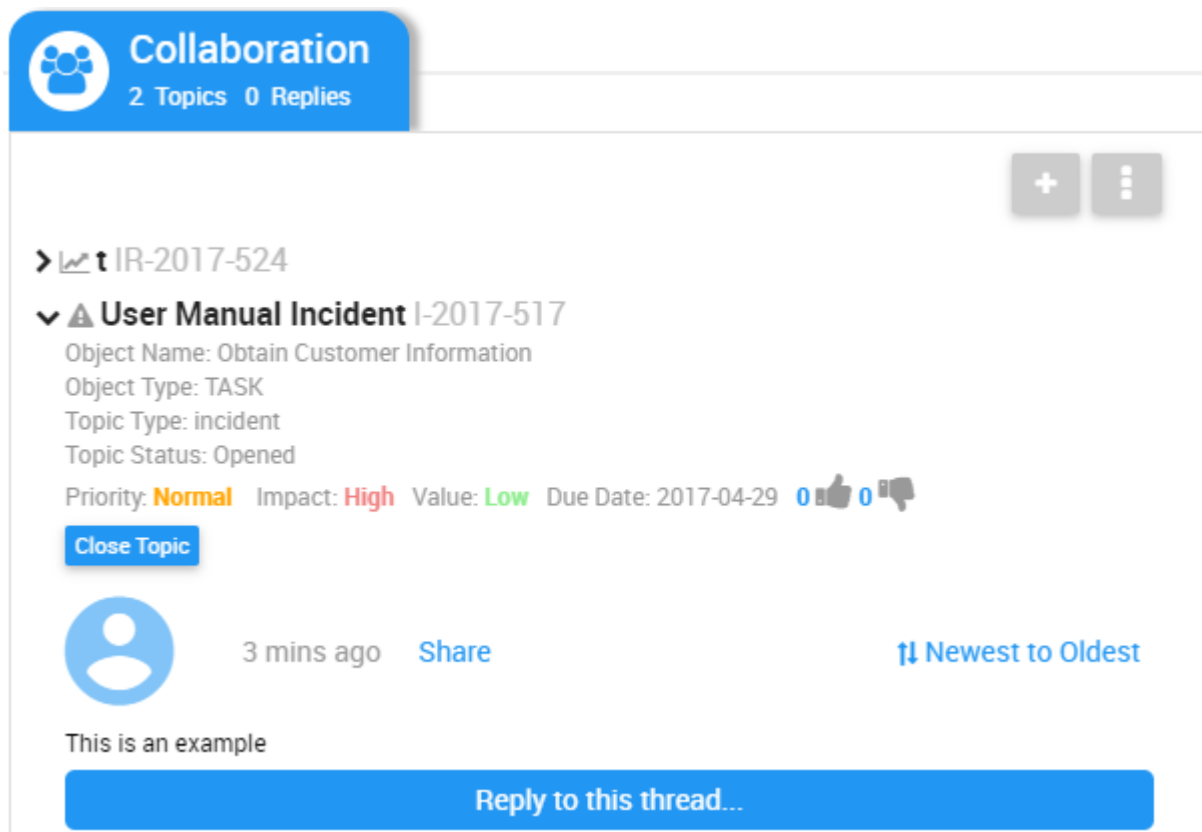
1. [Reply](#) to an open engagement
2. [Share](#) an engagement or comment
3. [Vote](#) on an open engagement, and
4. [Close](#) the collaboration engagement (If authorized)

4.12.2.2.1 Reply


Users can reply to collaboration engagements within the collaboration window. Users are encouraged 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



 **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](#)



4.12.2.2.2 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.

 **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



[Reply to this thread...](#)



4.12.2.2.3 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  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.


 **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 

Close Topic

 3 mins ago [Share](#) [↑ Newest to Oldest](#)

This is an example

Reply to this thread...

4.12.2.2.4 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.

The screenshot shows a web application interface for 'Collaboration'. At the top, there's a blue header with a group icon, the word 'Collaboration', and '2 Topics 0 Replies'. Below this, a topic card is displayed for 'IR-2017-524' with a sub-topic 'User Manual Incident I-2017-517'. The card details include: Object Name: Obtain Customer Information, Object Type: TASK, Topic Type: incident, Topic Status: Opened, Priority: Normal, Impact: High, Value: Low, and Due Date: 2017-04-29. A 'Close Topic' button is highlighted with a red box. Below the topic card, there's a user profile icon, '3 mins ago', a 'Share' button, and a 'Newest to Oldest' sort option. At the bottom, there's a blue bar with the text 'Reply to this thread...'. The text 'This is an example' is visible above the reply bar.

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.

**Collaboration**

2 Topics 0 Replies

You are closing this topic

Topic Type*

Incident

Subject*

User Manual Incident

Priority

Normal

Impact

High

Value

Low

Due Date

2017-04-29

 **Add a File****Description***

Cancel

Close Topic

4.12.2.3 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.

COLLABORATION									
LIST									
Favorite	Type	Subject	Replies	Status	Priority	Object Name	Object Type	Last Modified by	Modified Date
☆	Discussion	bvvv	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	wewew	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

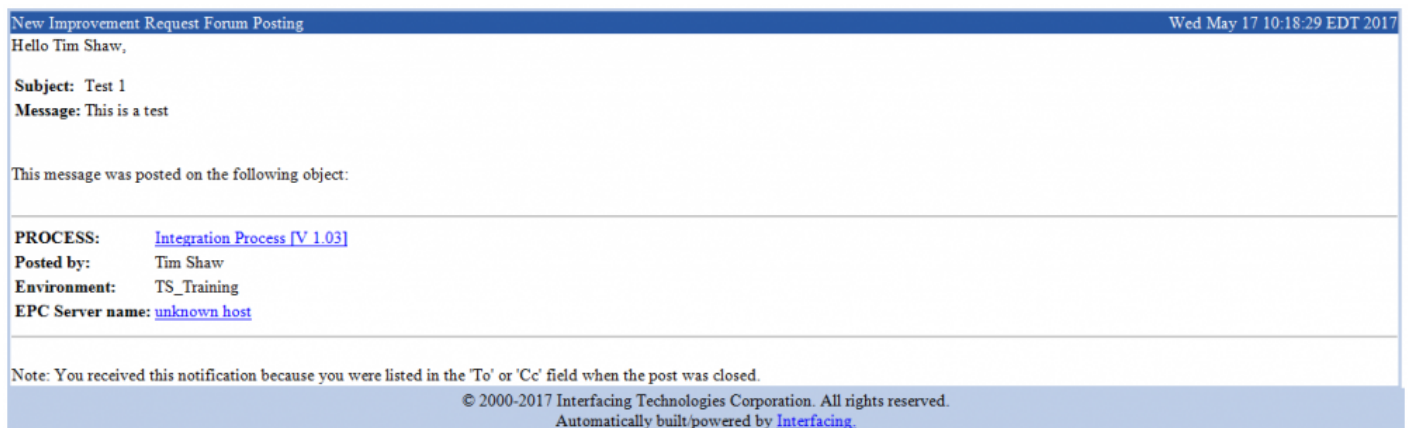
To view further details regarding each collaboration engagement, users will need to navigate to the collaboration page of specific items.

4.12.2.4 Notification and Confirmation

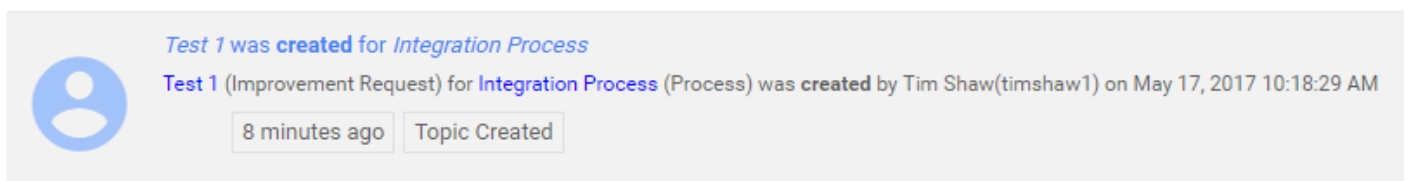
Users who are subscribed, or are associated with RASCI-VS to objects undergoing change, will receive notifications when collaboration engagements are initiated, acted upon and completed. This notification is designed to inform parties of activity related to them, their tasks or processes.

Users subscribed or associated with the process undergoing change will receive:

1. Email Notification



2. In-App Notification



4.12.3 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.

4.12.4 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.

4.12.5 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.

4.12.6 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.

 **Collaboration**
1 Topics 0 Replies

Topic Type*	Category
Improvement Request	N/A
Subject*	
Priority	Impact
Value	Due Date
	2017-04-26
Add a File	
Description*	
<div>Cancel Create</div>	

5.0 Search

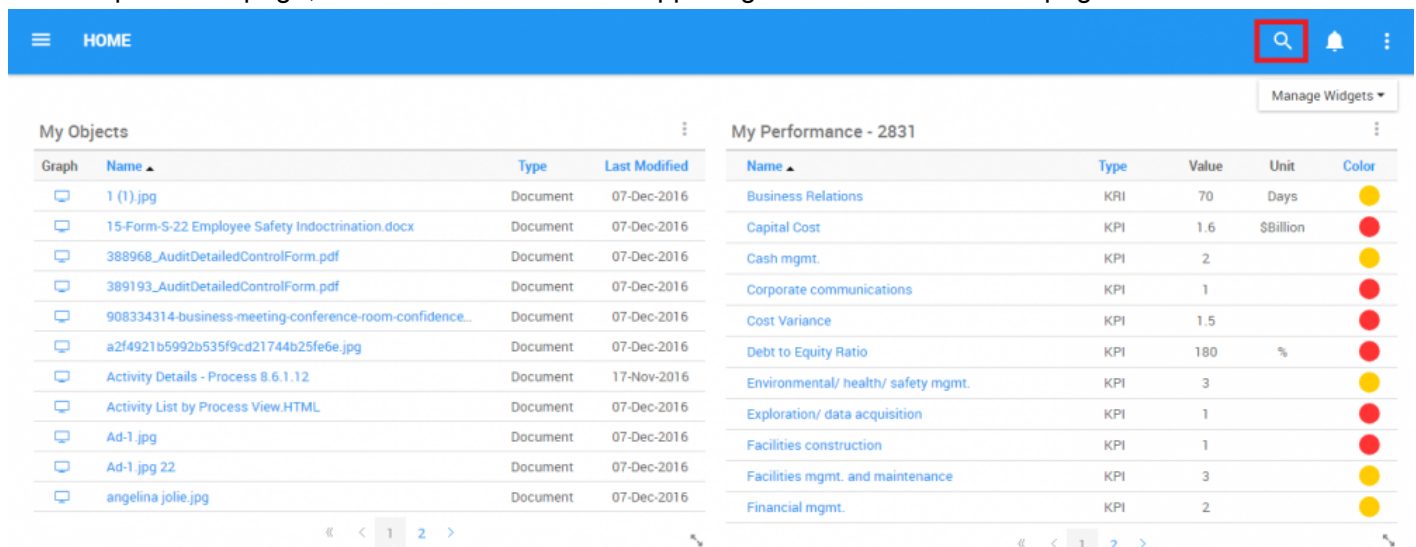
Users can leverage EPC's search function to easily find items within the Web App. The search function, represented by the  icon allows users to search through all uploaded items to which they have access to. This search function should be used when a user is searching for a specific item or key word. 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.



The screenshot shows the EPC10 WebApp interface. At the top, there is a blue navigation bar with a 'HOME' link and a search icon (magnifying glass) highlighted with a red box. Below the navigation bar, there are two main sections: 'My Objects' and 'My Performance - 2831'.


My Objects Table:

Graph	Name	Type	Last Modified
	1 (1).jpg	Document	07-Dec-2016
	15-Form-S-22 Employee Safety Indoctrination.docx	Document	07-Dec-2016
	388968_AuditDetailedControlForm.pdf	Document	07-Dec-2016
	389193_AuditDetailedControlForm.pdf	Document	07-Dec-2016
	908334314-business-meeting-conference-room-confidence...	Document	07-Dec-2016
	a2f4921b5992b535f9cd21744b25fe6e.jpg	Document	07-Dec-2016
	Activity Details - Process 8.6.1.12	Document	17-Nov-2016
	Activity List by Process View.HTML	Document	07-Dec-2016
	Ad-1.jpg	Document	07-Dec-2016
	Ad-1.jpg 22	Document	07-Dec-2016
	angelina jolie.jpg	Document	07-Dec-2016

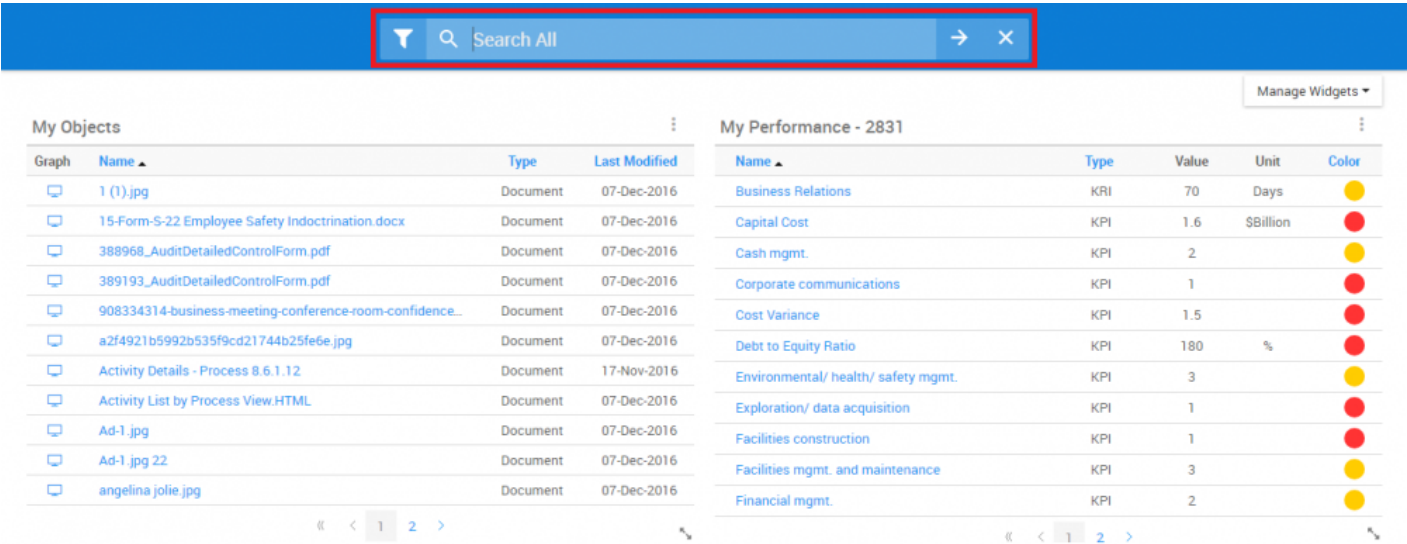
My Performance - 2831 Table:

Name	Type	Value	Unit	Color
Business Relations	KRI	70	Days	Yellow
Capital Cost	KPI	1.6	\$Billion	Red
Cash mgmt.	KPI	2		Yellow
Corporate communications	KPI	1		Red
Cost Variance	KPI	1.5		Red
Debt to Equity Ratio	KPI	180	%	Red
Environmental/ health/ safety mgmt.	KPI	3		Yellow
Exploration/ data acquisition	KPI	1		Red
Facilities construction	KPI	1		Red
Facilities mgmt. and maintenance	KPI	3		Yellow
Financial mgmt.	KPI	2		Yellow

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

2. Click on the icon and a search bar will generate



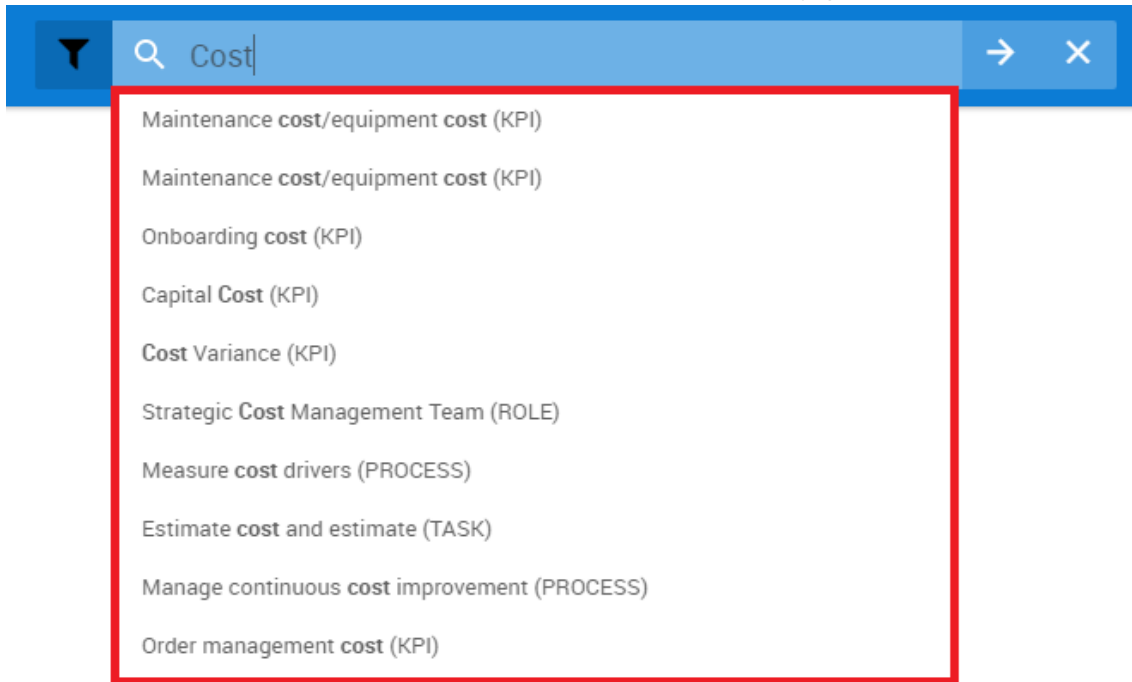
The search bar will display 3 buttons that the user can utilize:


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.



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.

6. Users will be navigated to the following page

SEARCH

290 results

Maintenance **cost**/equipment **cost** (KPI)

Maintenance **cost**/equipment **cost** (KPI)

Onboarding **cost** (KPI)

Capital **Cost** (KPI)

Cost Variance (KPI)

Strategic **Cost** Management Team (ROLE)

Measure **cost** drivers (PROCESS)

Estimate **cost** and estimate (TASK)

After analysing the plans, preceding budget and any known changes it is now possible to begin compiling the budget for the next financial year. This involves going through the budget, typically a spreadsheet defined by enterprise financial management, and estimating the values for each item for each month and quarter. In most cases the **costs** of items in the spreadsheet are known because of the preparation work done in analysing plans previous budgets etc. However, the **cost** of some budget items may not be known – for example, overtime payments, contractor payments, consumables, external network charges. These have to be estimated, usually based on the previous year's budget, or on a forward prediction of the **costs** of the estimated workload. Some **costs** may vary from the estimates, depending on usage. An example of this is software licences that may increase (in steps) as further users are introduced. Other **costs** may need to be estimated to cover out-of-hours support or major equipment relocation. Finance management must be cautious in estimating changes in **costs** where they do not fully control them. For example, planning a reduction of 20% computer accommodation usage by removing old disk drives and closing one room is unlikely to result in 20% saving in **costs**, as the rental for the space may be fixed by the lease.

Manage continuous **cost** improvement (PROCESS)

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.

4. After clicking the icon, the following pop-up menu will be generated on a user's screen

Advanced Search

×

Filter by type

Process
Performance
Organization
Documents

When was it modified

☒ Any time

☐ Within the last week

☐ Past month

☐ Within the past year

CloseSave changes

5. Select the desired search criteria and click the “Save Changes” button

Advanced Search

×

Filter by type

Process
Performance
Organization
Documents

When was it modified

☒ Any time

☐ Within the last week

☐ Past month

☐ Within the past year

CloseSave changes

6. The selected criteria will be saved, and you can proceed to your search.


6.0 Notifications

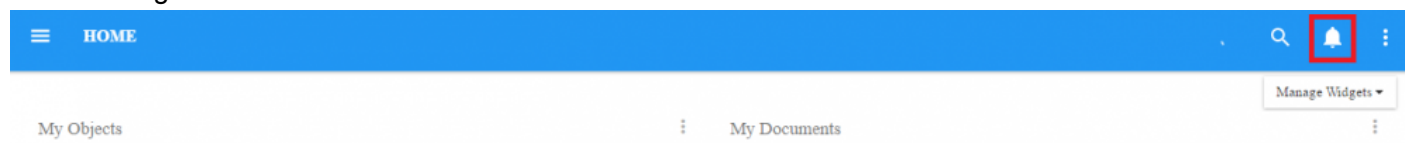
In order to facilitate users' ability to track essential job-pertinent information, the EPC 10 Web App features notifications that are tied to users' items and responsibilities. Users are notified when events takes place, regarding items pertinent to the user in question. This allows users to keep up 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

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

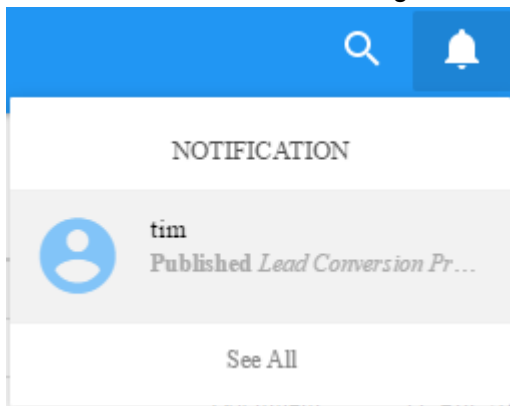
To view Notifications, please see the steps below:

1. Login to the EPC

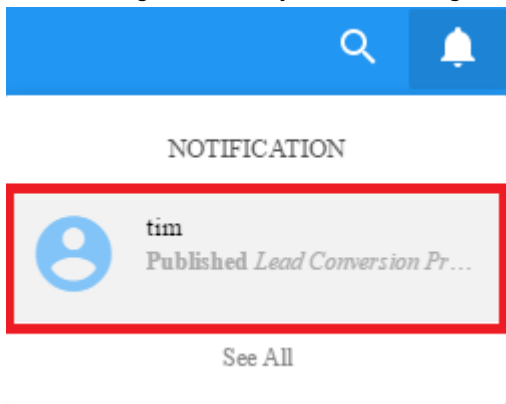


2. Navigate to the notification icon

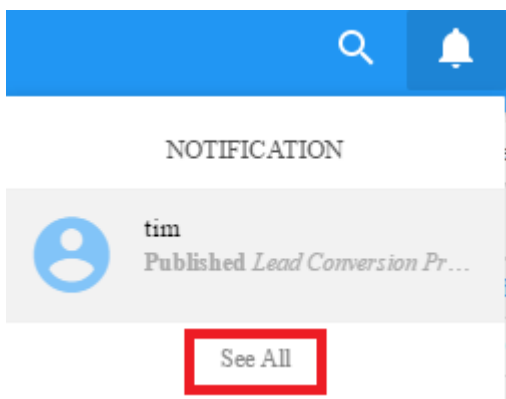
3. Click on the icon and it will generate a drop-down window







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



6. Users will be navigated to the Notifications Page which will provide you with a historical list of all notifications received by the user

 NOTIFICATION   

Object Type : ALL SELECTED ▼ Notification Type : ALL SELECTED ▼ Date Range :



Published Lead Conversion Process
Lead Conversion Process (Process) was published by Tim Shaw(timshaw1) on Apr 26, 2017 4:48:59 PM
12 minutes ago Node Published

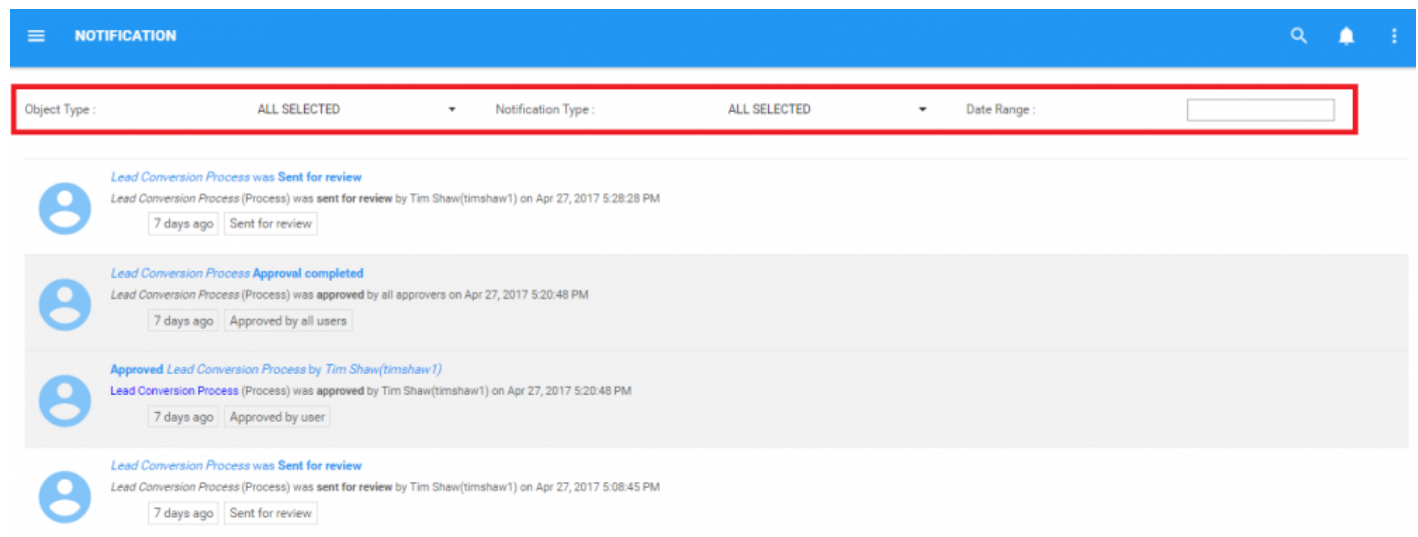
No more results to show

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:

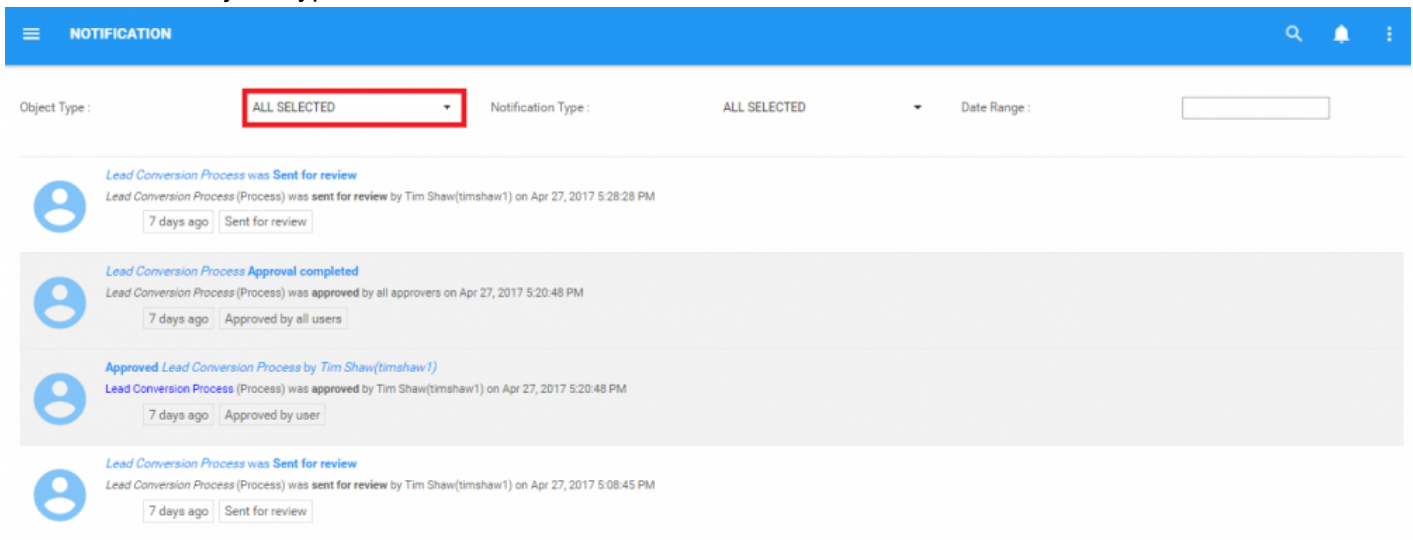
1. Object Type
2. Notification Type
3. Date Range



Using Object Type

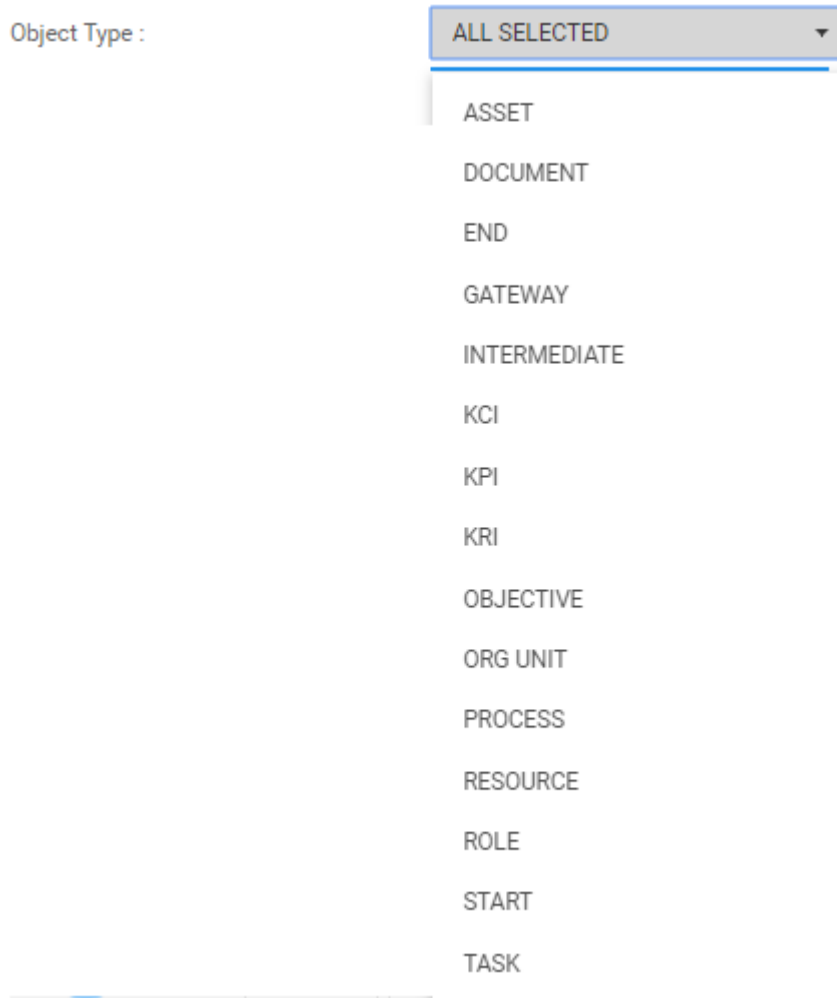
1. Navigate to the Notifications page

2. Select the “Object Type” Task bar



The screenshot shows a blue header bar with a hamburger menu icon, the word "NOTIFICATION", a search icon, a bell icon, and a vertical ellipsis icon. Below the header, there are three filter sections: "Object Type:" with a dropdown menu showing "ALL SELECTED" (highlighted with a red box), "Notification Type:" with a dropdown menu showing "ALL SELECTED", and "Date Range:" with an empty text input field. Below the filters, there is a list of notifications. Each notification entry includes a user profile icon, a blue link to the notification, a description of the event, the user who performed the action, the date and time, and two buttons: "7 days ago" and "Sent for review".

3. This will generate a drop-down menu



The screenshot shows the "Object Type:" label followed by a dropdown menu. The dropdown menu is open, displaying a list of object types: ASSET, DOCUMENT, END, GATEWAY, INTERMEDIATE, KCI, KPI, KRI, OBJECTIVE, ORG UNIT, PROCESS, RESOURCE, ROLE, START, and TASK. The dropdown menu has a blue border and a downward arrow icon.

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

Object Type : ALL SELECTED Notification Type : ALL SELECTED Date Range :

Lead Conversion Process was Sent for review
Lead Conversion Process (Process) was sent for review by Tim Shaw(timshaw1) on Apr 27, 2017 5:28:28 PM
7 days ago Sent for review

Lead Conversion Process Approval completed
Lead Conversion Process (Process) was approved by all approvers on Apr 27, 2017 5:20:48 PM
7 days ago Approved by all users

Approved Lead Conversion Process by Tim Shaw(timshaw1)
Lead Conversion Process (Process) was approved by Tim Shaw(timshaw1) on Apr 27, 2017 5:20:48 PM
7 days ago Approved by user

Lead Conversion Process was Sent for review
Lead Conversion Process (Process) was sent for review by Tim Shaw(timshaw1) on Apr 27, 2017 5:08:45 PM
7 days ago Sent for review

3. This will generate a drop-down menu

Notification Type :

ALL SELECTED ▼

APPROVED BY ALL USERS

APPROVAL CANCELED

SENT FOR REVIEW

APPROVAL REJECTED

APPROVED BY USER

IMPROVEMENT REQUEST APPROVED

IMPROVEMENT REQUEST IMPLEMENTED

IMPROVEMENT REQUEST REJECTED

TOPIC CREATED

NODE DELETED

NODE PUBLISHED

REVIEW DATE NEXT

REVIEW DATE PAST DUE

TOPIC CLOSED

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

2. Select the “Date Range” Task bar

NOTIFICATION

Object Type : ALL SELECTED Notification Type : ALL SELECTED Date Range :

Lead Conversion Process was Sent for review
Lead Conversion Process (Process) was sent for review by Tim Shaw(timshaw1) on Apr 27, 2017 5:28:28 PM
7 days ago Sent for review

Lead Conversion Process Approval completed
Lead Conversion Process (Process) was approved by all approvers on Apr 27, 2017 5:20:48 PM
7 days ago Approved by all users

Approved Lead Conversion Process by Tim Shaw(timshaw1)
Lead Conversion Process (Process) was approved by Tim Shaw(timshaw1) on Apr 27, 2017 5:20:48 PM
7 days ago Approved by user

Lead Conversion Process was Sent for review
Lead Conversion Process (Process) was sent for review by Tim Shaw(timshaw1) on Apr 27, 2017 5:08:45 PM
7 days ago Sent for review

3. This will generate a drop-down menu

Date Range :

< Apr 2017 May 2017 >

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

Today
Yesterday
Last 7 Days
Last 30 Days
This Month
Last Month
Apply Cancel

Users can manually type in the date ranges they desire:

Date Range :

<

Apr 2017

>

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

<

May 2017

>

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

Today

Yesterday

Last 7 Days

Last 30 Days

This Month

Last Month

Apply

Cancel

Users can select the date range within the displayed calendar by selecting both the month and date within each calendar:

Date Range :

<

Apr 2017

>

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

<

May 2017

>

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

Today

Yesterday

Last 7 Days

Last 30 Days

This Month

Last Month

Apply

Cancel

Users can also select the default date ranges:

Date Range :

21-Apr-2017

< Apr 2017 >

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

04-May-2017

< May 2017 >

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

Today

Yesterday

Last 7 Days

Last 30 Days

This Month

Last Month

Apply

Cancel

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](#)

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.

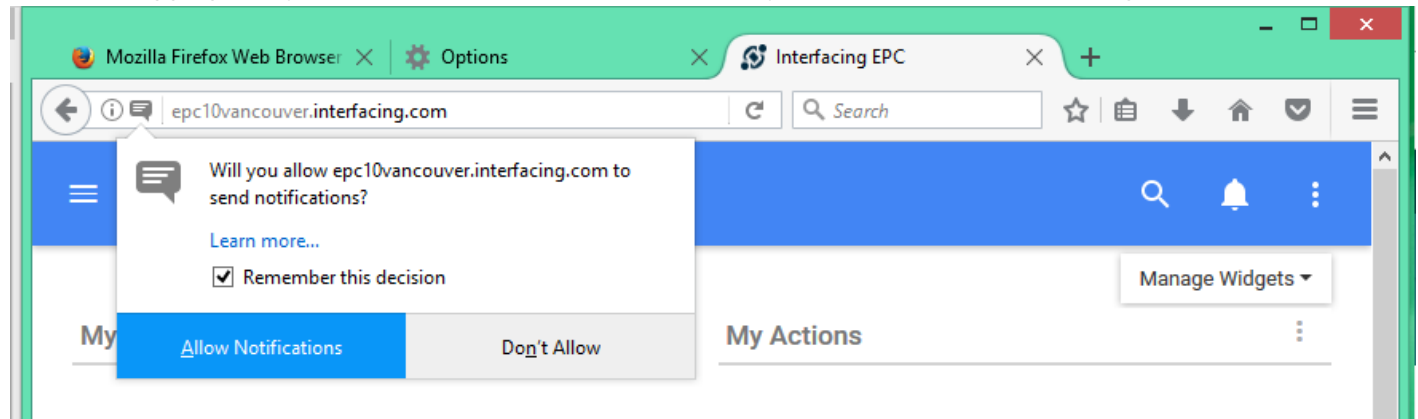
6.2.2 Firefox Notifications

Enabling Notifications

To enable browser notifications for Mozilla Firefox, please see the steps below:

First Time Users

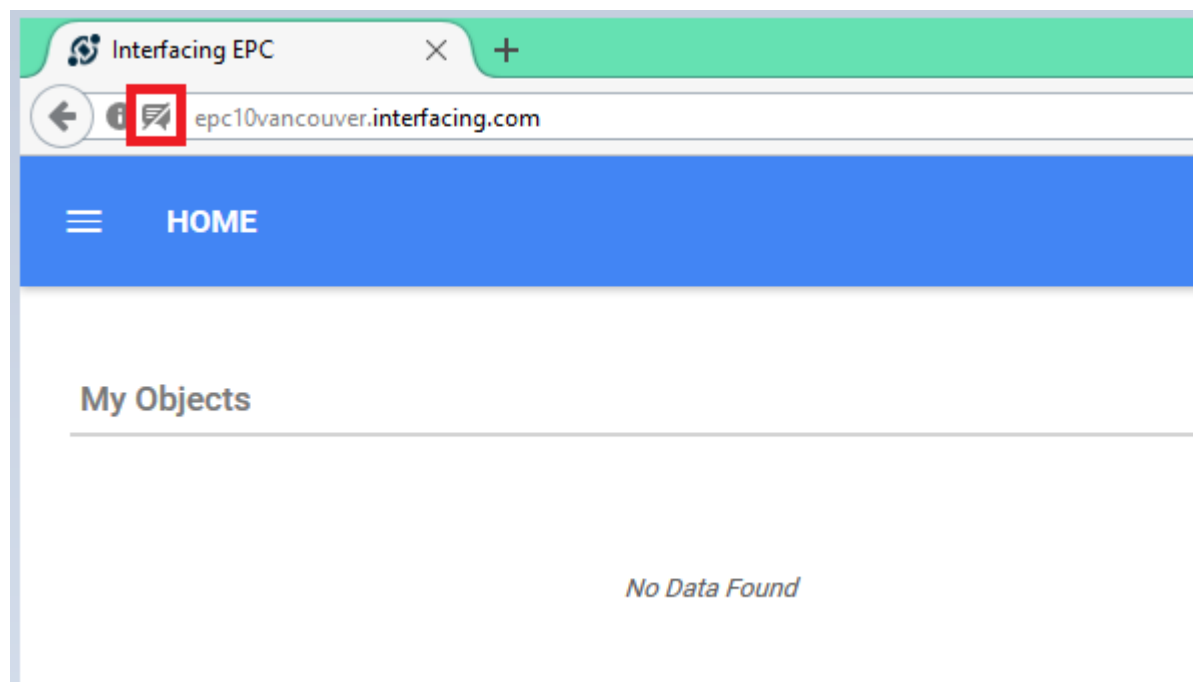
1. When logging into your EPC Web App for the first time, you will receive the following



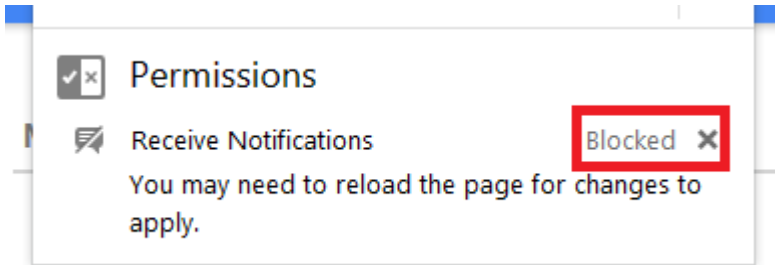
2. Select "Allow Notifications"

Repeat Users

1. Select the "Notifications" icon next to the URL



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.

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.

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 depending 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:

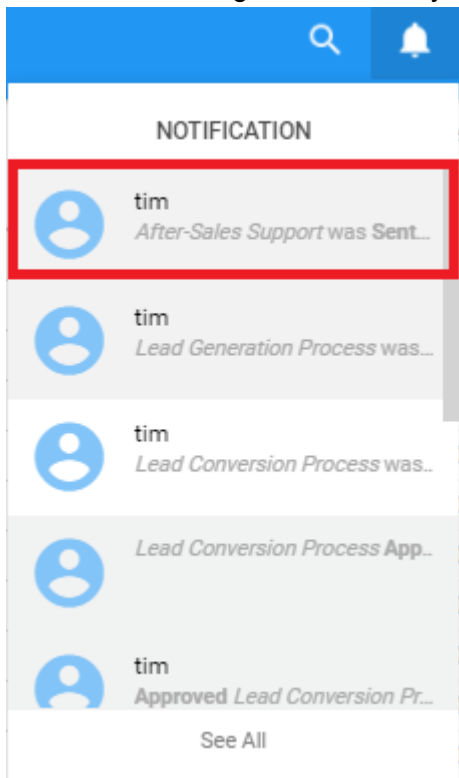
1. Through their [notifications](#)
2. Through their [My Actions Widget](#)

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”

2. Users can navigate to their “My Pending Approvals” of the specific object by selecting the notification

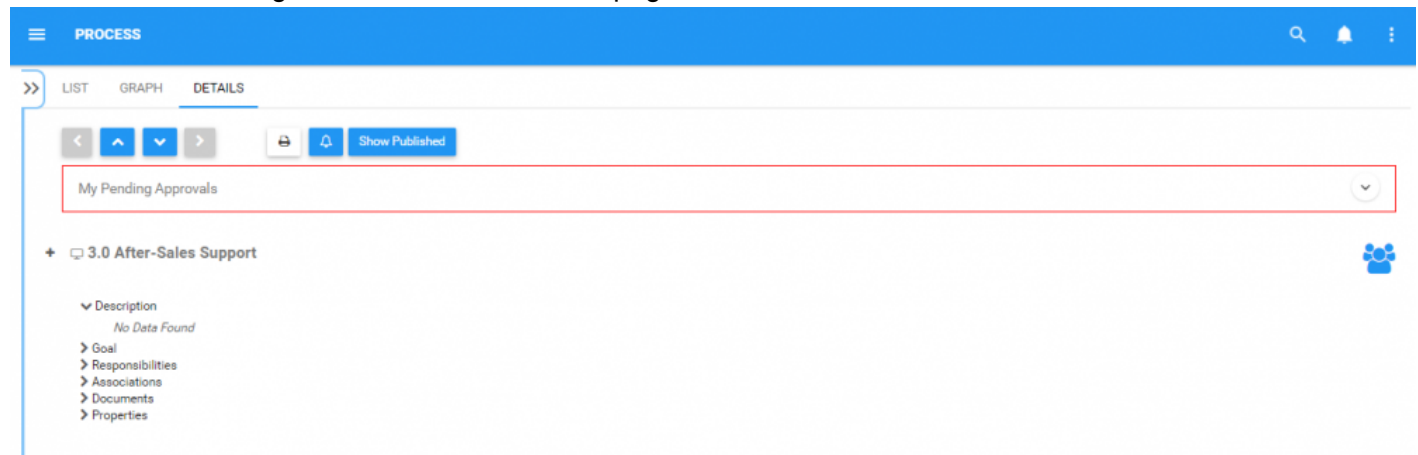


Or through their “My Actions” Widget

My Actions ⋮

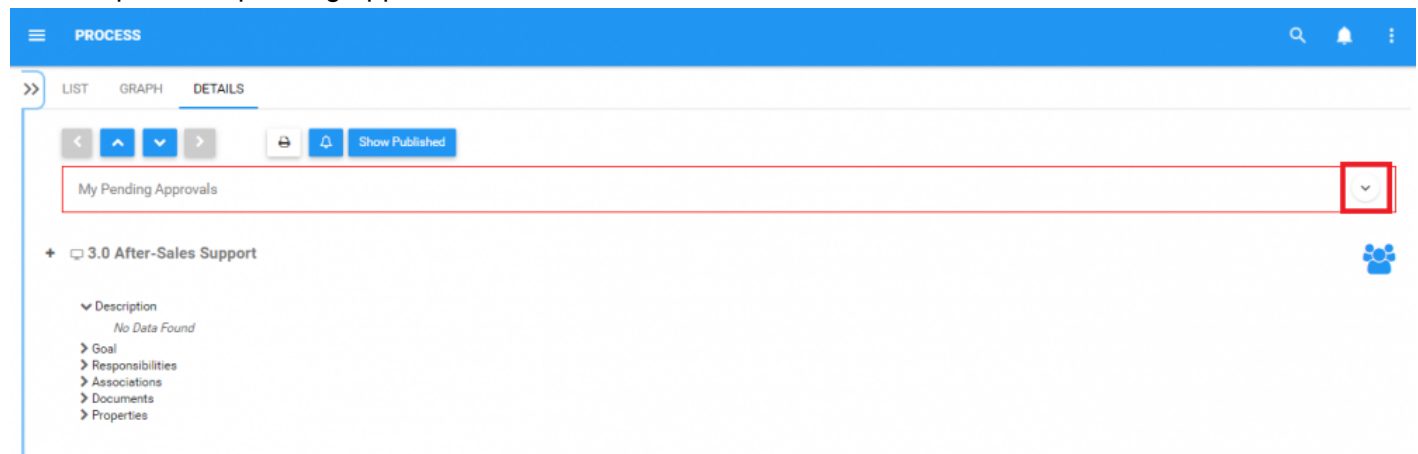
Graph	Name ▲	Action Type	Pending Since	Type
	After-Sales Support	Approval	04-May-2017	Process
	Lead Generation Process	Approval	04-May-2017	Process
	Lead Conversion Process	Approval	27-Apr-2017	Process

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



5. This will expand the Approval Request, providing the user with additional information about the proposed change

My Pending Approvals

"After-Sales Support" needs your review and approval.

Comment from : Tim Shaw (timshaw1)

No comment for this version

Attachment: [Satisfaction Assessment Criteria.xlsx](#)

Your comment

Approve

Reject

Show Changes

Approval Cycle



Waiting for approval Tim Shaw (timshaw1)

a few seconds ago

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).

My Pending Approvals

"After-Sales Support" needs your review and approval.

Comment from : Tim Shaw (timshaw1)

No comment for this version

Attachment: **Satisfaction Assessment Criteria.xlsx**

Your comment

Approve

Reject

Show Changes

Approval Cycle



Waiting for approval **Tim Shaw (timshaw1)**

a few seconds ago

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

properties are displayed.

▼ Properties

▼ Version

Version Number: 2.

02

03

Last Modified:

a day


30 minutes ago

▼ Analysis

Cost	0.0 USD
Delay	0 00:00:00
Duration	0 00:00:00

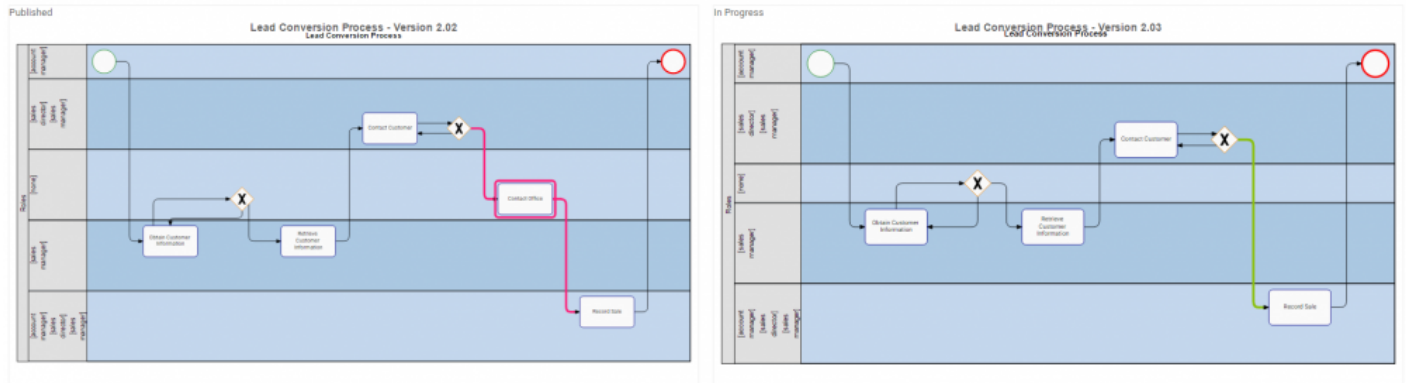
* The changes will be displayed on the page you are currently featured. If you are on an item’s Details page, the changes will be displayed on the details below. For graphical representation of the changes, please see the steps below.

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.



✿ 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.

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.

© 2000-2017 Interfacing Technologies Co
Automatically built/powered

	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

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.

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.	
© 2000-2017 Interfacing Technologies Corporation. All rights reserved. Automatically built/powered by Interfacing .	



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

Confirmation Required

Object Name: Early Support
Version: 14.01

Published by: Administrator (epcadmin)
Publisher's Comment:
No comment for this version

Your comment:


I acknowledge I have read and understood the contents of this "Process" and have been given full opportunity to discuss the implications of any changes to my role and/or procedures.

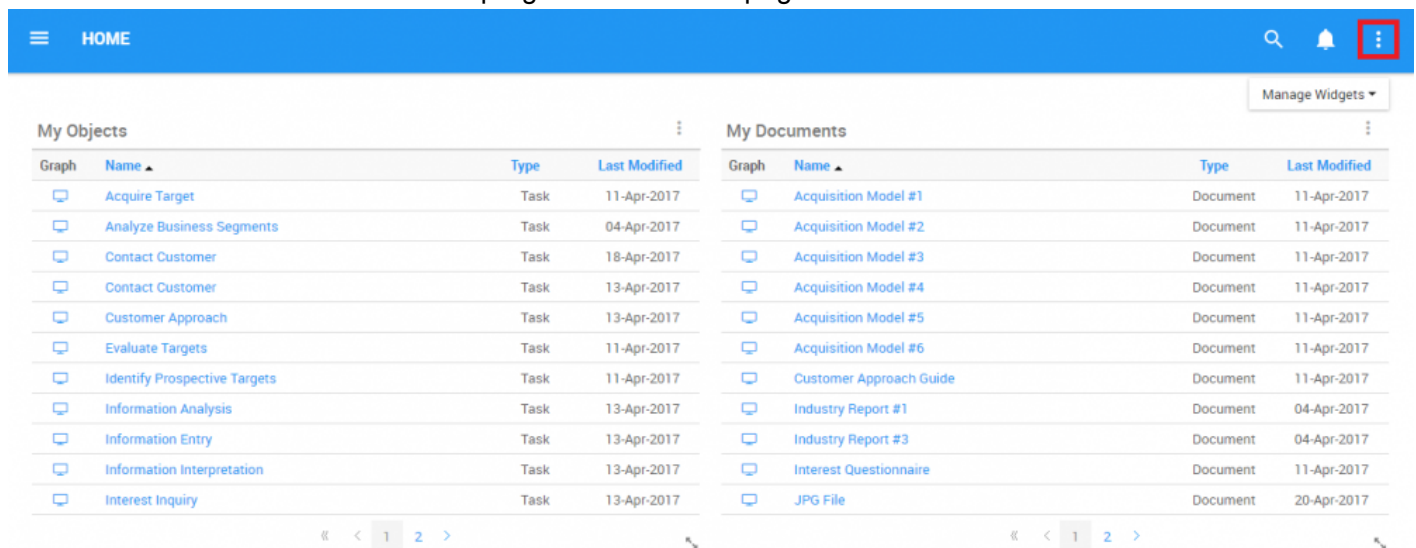
Confirm

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:

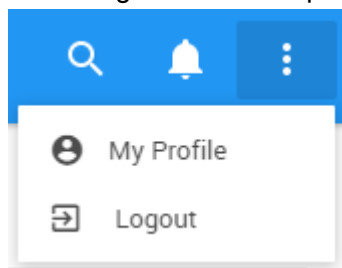
1. Select the  button at the top right corner of the page



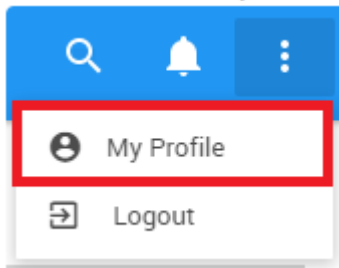
Graph	Name	Type	Last Modified
	Acquire Target	Task	11-Apr-2017
	Analyze Business Segments	Task	04-Apr-2017
	Contact Customer	Task	18-Apr-2017
	Contact Customer	Task	13-Apr-2017
	Customer Approach	Task	13-Apr-2017
	Evaluate Targets	Task	11-Apr-2017
	Identify Prospective Targets	Task	11-Apr-2017
	Information Analysis	Task	13-Apr-2017
	Information Entry	Task	13-Apr-2017
	Information Interpretation	Task	13-Apr-2017
	Interest Inquiry	Task	13-Apr-2017

Graph	Name	Type	Last Modified
	Acquisition Model #1	Document	11-Apr-2017
	Acquisition Model #2	Document	11-Apr-2017
	Acquisition Model #3	Document	11-Apr-2017
	Acquisition Model #4	Document	11-Apr-2017
	Acquisition Model #5	Document	11-Apr-2017
	Acquisition Model #6	Document	11-Apr-2017
	Customer Approach Guide	Document	11-Apr-2017
	Industry Report #1	Document	04-Apr-2017
	Industry Report #3	Document	04-Apr-2017
	Interest Questionnaire	Document	11-Apr-2017
	JPG File	Document	20-Apr-2017

2. It will generate a drop-down menu



3. Click on the “My Profile” button



4. You will be prompted to your profile page

A screenshot of a web application's profile page. The page has a blue header bar with a hamburger menu icon, the word "PROFILE", and search, notification, and user icons. The main content area is divided into two sections: "General" and "Preferences". The "General" section contains four input fields: "User Name" (01usermanual), "Email Address" (yuio@tuytiii), "First Name" (iyuoio), and "Last Name" (empty). The "Preferences" section contains two input fields: "Environment" (TS_Training) and "Displayed Content" (Published Only).

The My Profile section features 5 major components

1. [General](#)
2. [Preferences](#)
3. [Language](#)
4. [Theme Roller](#)
5. [Authorization](#)

1 General

User Name	Email Address
timshaw1	
First Name	Last Name
Tim	Shaw

2 Preferences

Environment	Displayed Content
TS_Training	Published Only

3 Language

Interface Language	Content Language
English	English

4 Theme Roller

#2196f3

Roll Theme

Reset

5 Authorizations

Administrator

Modeler Access

Portal Access

8.1 General

The General sub-section displays general information about you. This information is uploaded by EPC Modelers and System Administrators. The personal information will be locked but is displayed for a user to see. User can only add and edit his profile picture.

You will find the following four details:

- a) User Name**
- b) Email Address**
- c) First Name**
- d) Last Name**

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](#)

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.

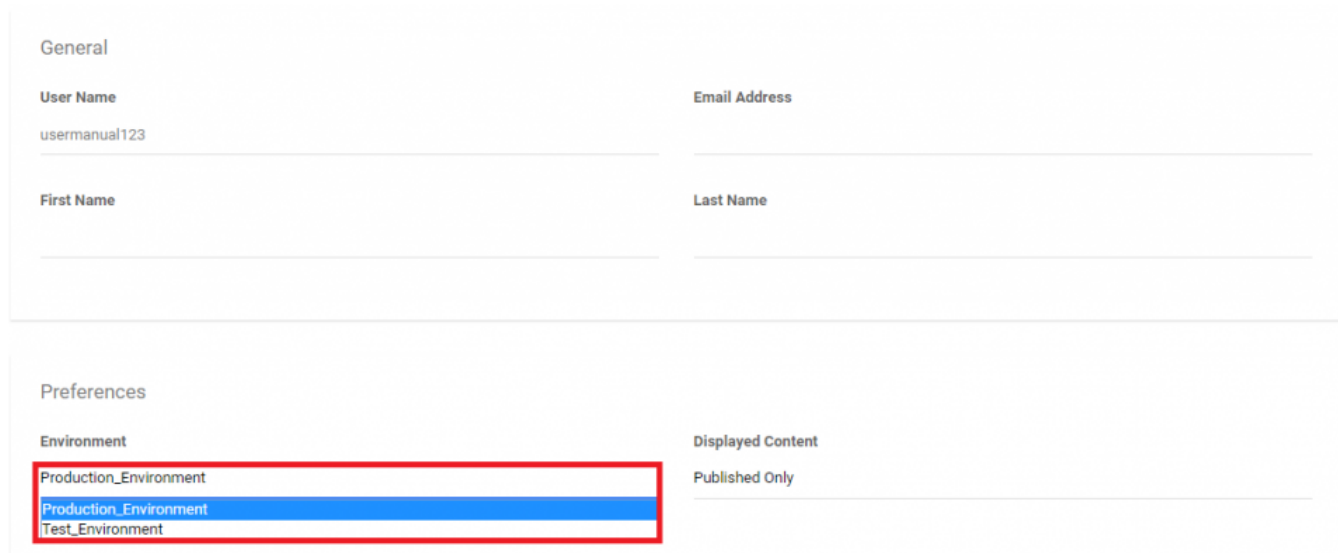
There are a variety of scenarios that would require organizations to have, or use multiple different environments

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



The screenshot displays the 'My Profile' section of the EPC Web App. It is divided into two main sections: 'General' and 'Preferences'.

General Section:

- User Name:** usermanual123
- Email Address:** (empty text box)
- First Name:** (empty text box)
- Last Name:** (empty text box)

Preferences Section:

- Environment:** A dropdown menu is highlighted with a red box. It contains three options: 'Production_Environment' (selected and highlighted in blue), 'Production_Environment', and 'Test_Environment'.
- Displayed Content:** Published Only

4. It will generate a drop-down menu featuring all the environments that you have been given access to.

Environment

Production_Environment

Production_Environment

Test_Environment

5. Select the environment you wish to work in. The page will be refreshed and you will now be navigating this environment

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

3. Select the Displayed Content text box

General

User Name

usermanual123

Email Address

First Name

Last Name

Preferences

Environment

Production_Environment

Displayed Content

Published Only

Language

Interface Language


English

Content Language

English

Theme Roller

#4285f4



Roll Theme

Reset

4. It will generate a drop-down menu featuring all the content settings that you have been given access to.

Displayed Content

Published Only

Published Only

Show Latest

5. Select the content setting you wish to navigate. The page will be refreshed and you will now be navigating this content setting.

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.

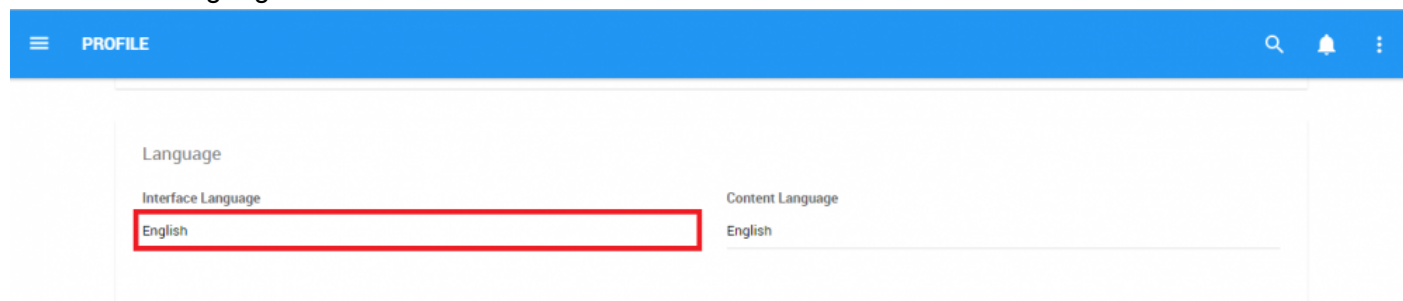
Item	Details
Interface Language	Defines the language of your EPC user interface.
Content Language	Defines the language in which content, uploaded by system administrators and modelers is displayed

✿ 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

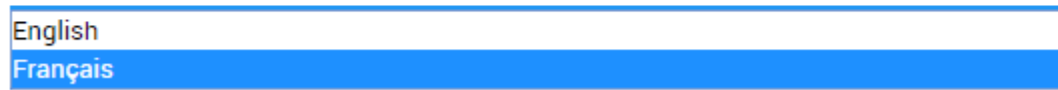


The screenshot shows the 'PROFILE' section of the EPC10 WebApp. Under the 'Language' heading, there are two dropdown menus. The 'Interface Language' dropdown is highlighted with a red rectangular box and displays 'English'. The 'Content Language' dropdown also displays 'English'.

4. It will generate a drop-down menu featuring all the languages that you have been given access to.

Interface Language

English

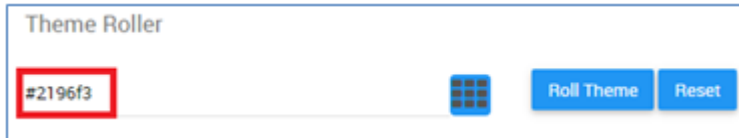


English
Français

5. Select the language you wish to display. The page will be refreshed and you will now be navigating the selected language.

8.4 Theme Roller

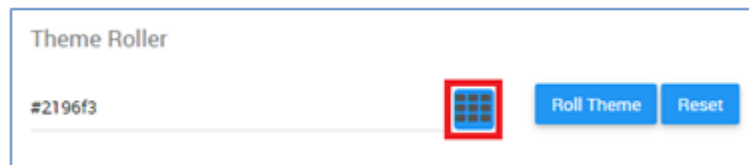
The theme roller allows users to edit the color that their EPC Web App displays. The specific color being displayed is represented by an alphanumeric code in the text box.



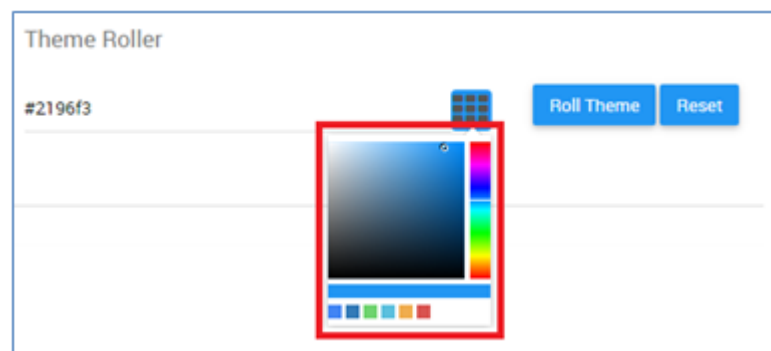
Please see the following instructions to change the color of your EPC Web App

1. Navigate to the “My Profile” section of the EPC
2. Scroll down to Theme Roller section

3. Select the  icon



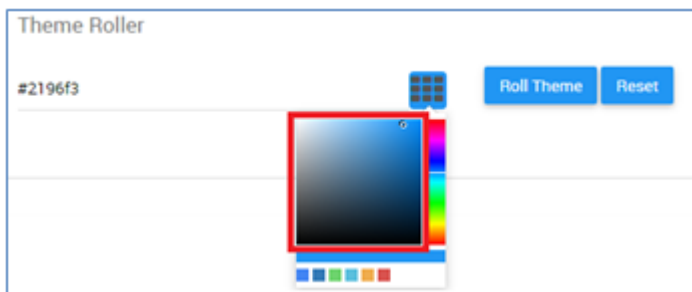
4. It will generate a drop-down menu featuring a color select window



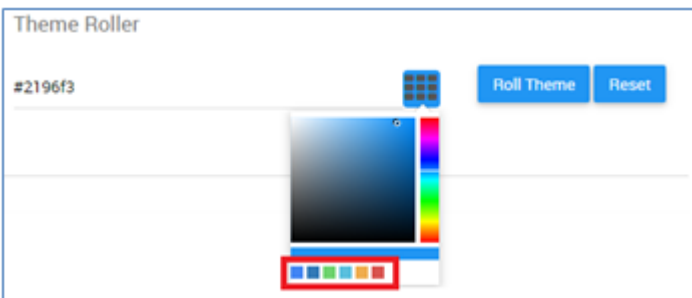
5. Users can select between the color bar a), shade b) and from c) recent colors by clicking on their desired selection



a.

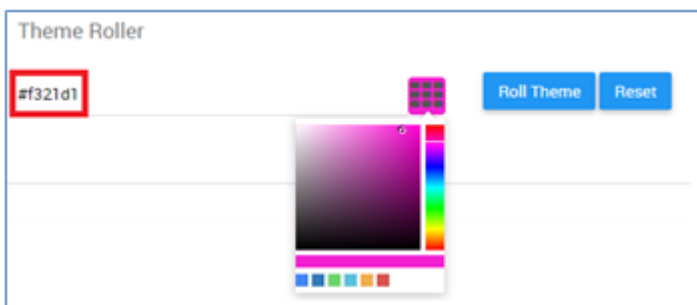


b.

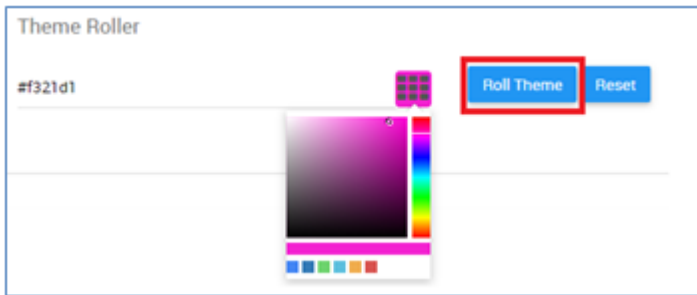


c.

6. Select to color you desire. It will enter a new alphanumeric code in the text box.

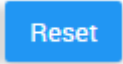



7. Select the “Roll Theme” button to apply the theme



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**

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 or WebApp Edit
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.

Authorizations



Example 2: This user has access to the EPC Web App and the EPC Modeler, and is an Administrator.

Authorizations



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.

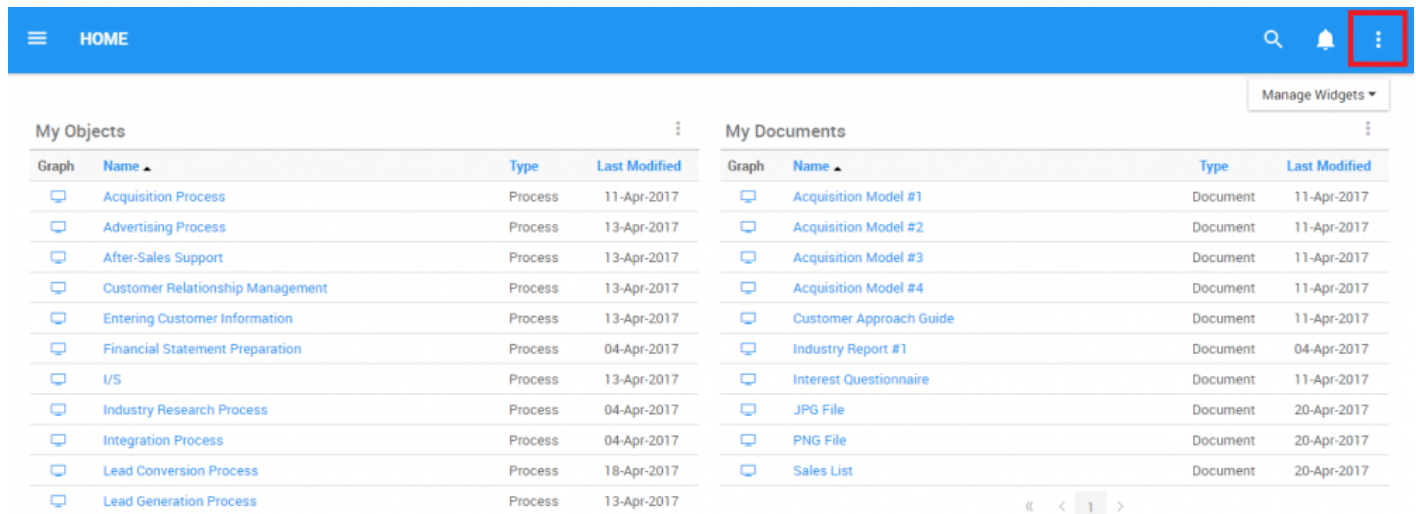
9.1 Environment Settings

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

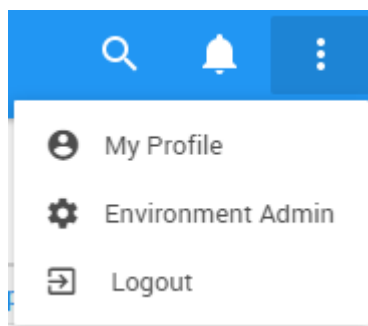
2. On the Home page, navigate your cursor to the  icon



Graph	Name	Type	Last Modified
	Acquisition Process	Process	11-Apr-2017
	Advertising Process	Process	13-Apr-2017
	After-Sales Support	Process	13-Apr-2017
	Customer Relationship Management	Process	13-Apr-2017
	Entering Customer Information	Process	13-Apr-2017
	Financial Statement Preparation	Process	04-Apr-2017
	I/S	Process	13-Apr-2017
	Industry Research Process	Process	04-Apr-2017
	Integration Process	Process	04-Apr-2017
	Lead Conversion Process	Process	18-Apr-2017
	Lead Generation Process	Process	13-Apr-2017

Graph	Name	Type	Last Modified
	Acquisition Model #1	Document	11-Apr-2017
	Acquisition Model #2	Document	11-Apr-2017
	Acquisition Model #3	Document	11-Apr-2017
	Acquisition Model #4	Document	11-Apr-2017
	Customer Approach Guide	Document	11-Apr-2017
	Industry Report #1	Document	04-Apr-2017
	Interest Questionnaire	Document	11-Apr-2017
	JPG File	Document	20-Apr-2017
	PNG File	Document	20-Apr-2017
	Sales List	Document	20-Apr-2017

3. Select the icon and it will generate a drop-down menu



- My Profile
- Environment Admin
- Logout

4. Select the Environment Admin option and you will be navigated to the “General” section

ENVIRONMENT ADMIN

GENERAL

SEARCH

LANGUAGE

Theme Roller

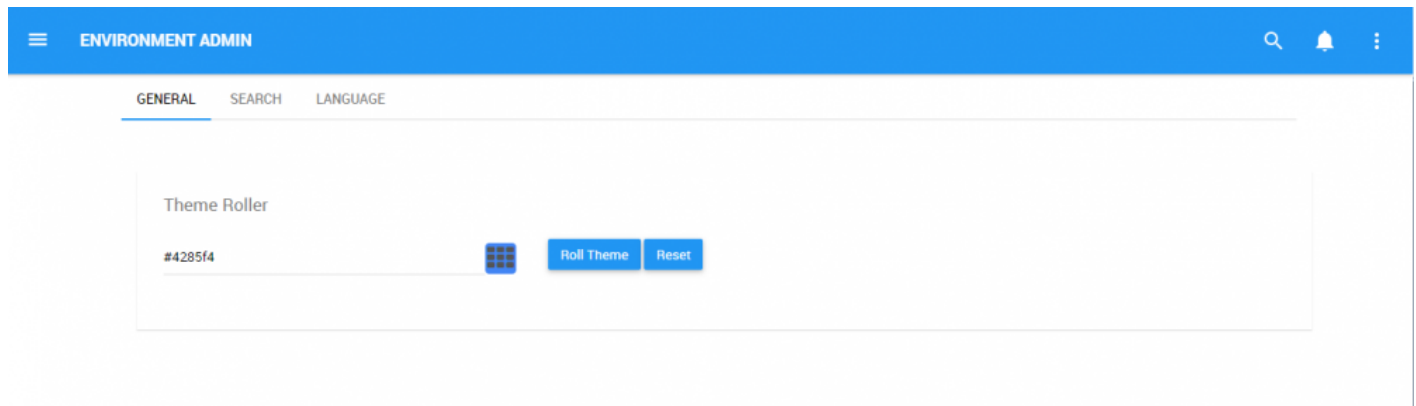
#4285f4

Roll Theme

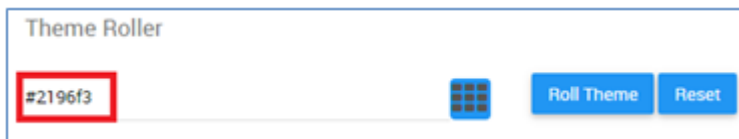
Reset

9.1.1 General

The General environment settings page allows Environment Admins to set the Color Theme for the entire environment.



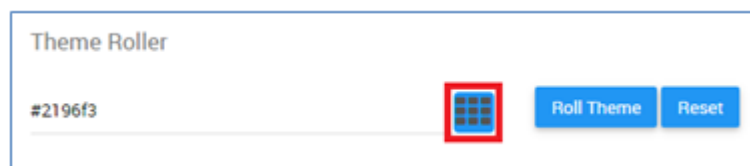
The theme roller allows users to edit the color that their EPC Web App displays. The specific color being displayed is a Hex code in the text box.



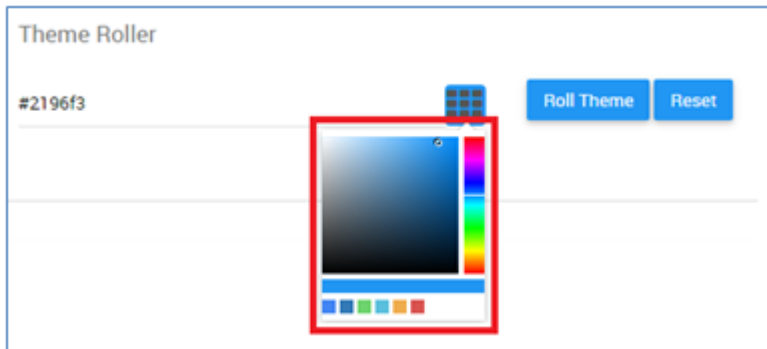
Please see the following instructions to change the color of your EPC Web App

1. Navigate to the “Environment Admin” section of the EPC

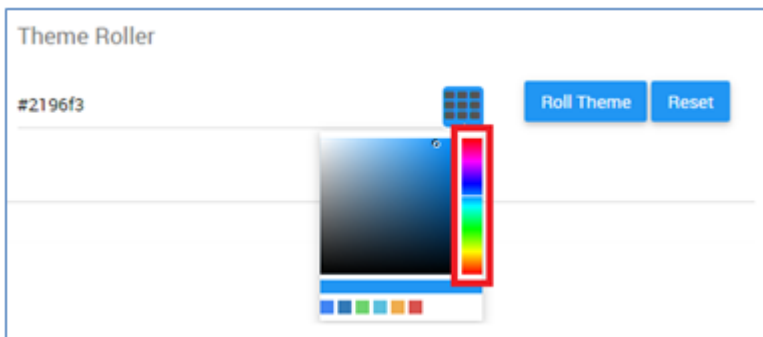
2. Select the  icon



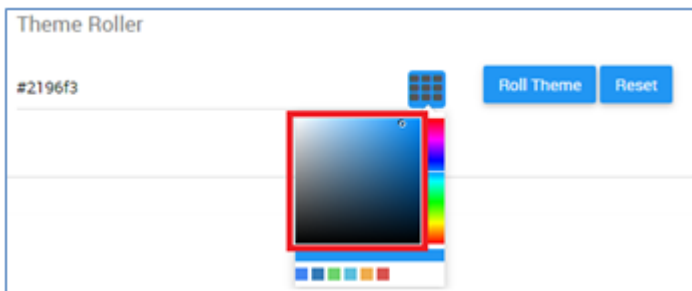
3. It will generate a drop-down menu featuring a color select window



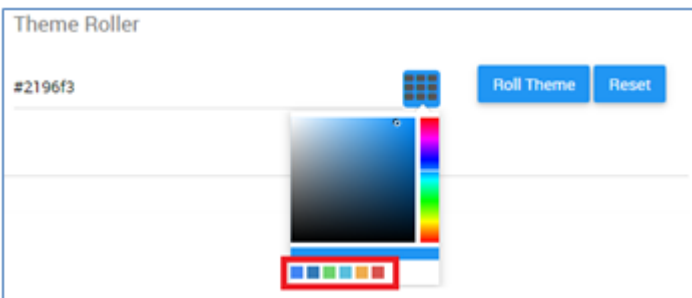
4. Users can select between the color bar a), shade b) and from c) recent colors by clicking on their desired selection



a)

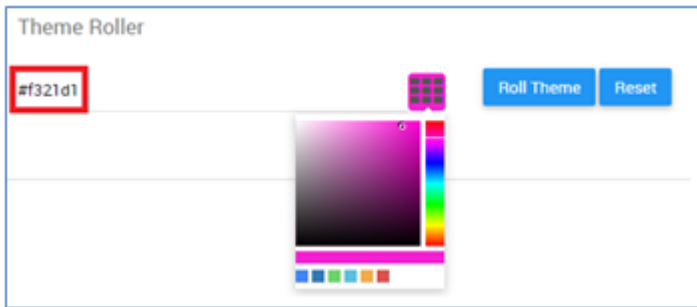


b)

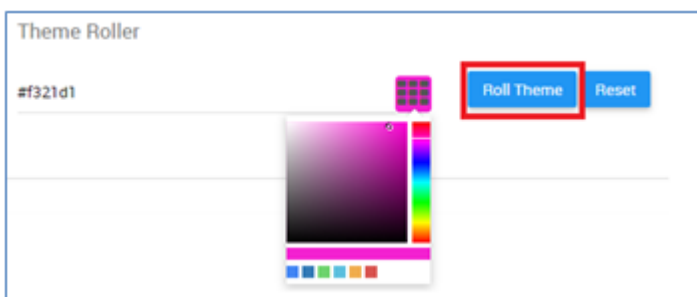


c)

5. Select to color you desire. It will enter a new alphanumeric code in the text box.

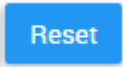



6. Select the “Roll Theme” button to apply the theme



7. The page will be reloaded and the new theme will be applied

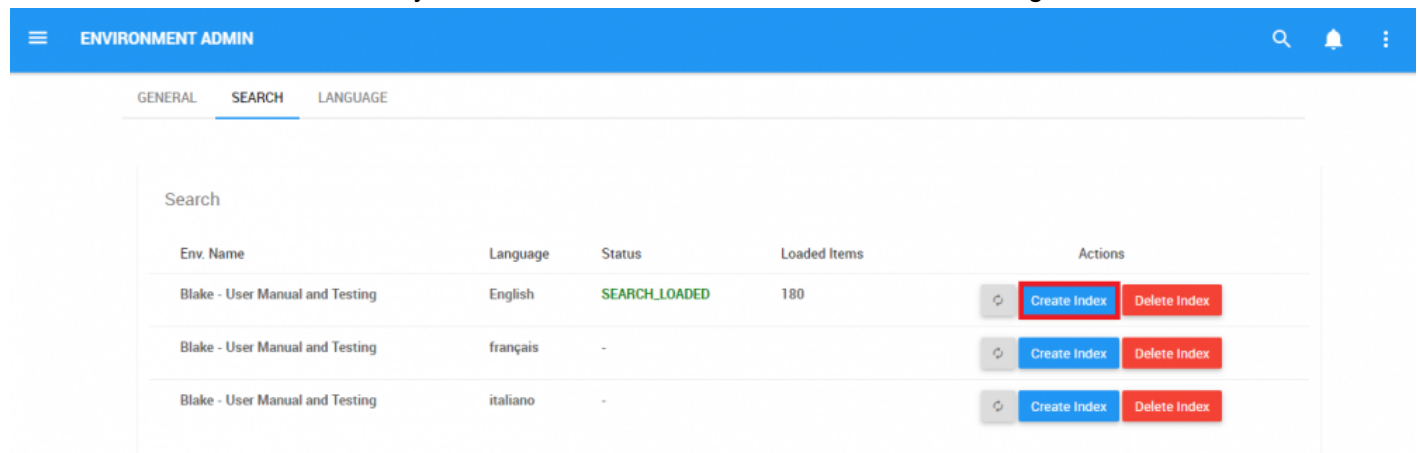
To revert back to a former or default color, you can:

- i. Select the “Reset” button 
- ii. Select the desired color from the “Recent Color” bar 
- iii. Enter in the default alphanumeric code – **#2196f3**

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.



The screenshot shows the 'ENVIRONMENT ADMIN' interface with the 'SEARCH' tab selected. Below the tabs are 'GENERAL', 'SEARCH', and 'LANGUAGE'. The main content area is titled 'Search' and contains a table with the following data:

Env. Name	Language	Status	Loaded Items	Actions
Blake - User Manual and Testing	English	SEARCH_LOADED	180	Create Index Delete Index
Blake - User Manual and Testing	français	-		Create Index Delete Index
Blake - User Manual and Testing	italiano	-		Create Index Delete Index

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.

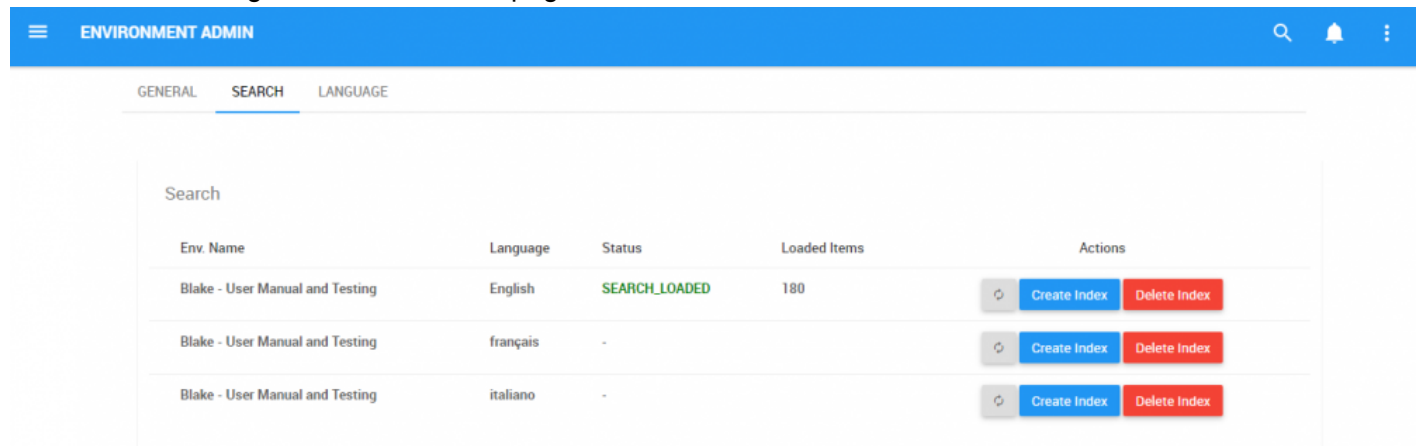
To Create Search Indexes, please see the steps below:




1. Navigate to Environment Admin page
2. Navigate to Search Tab



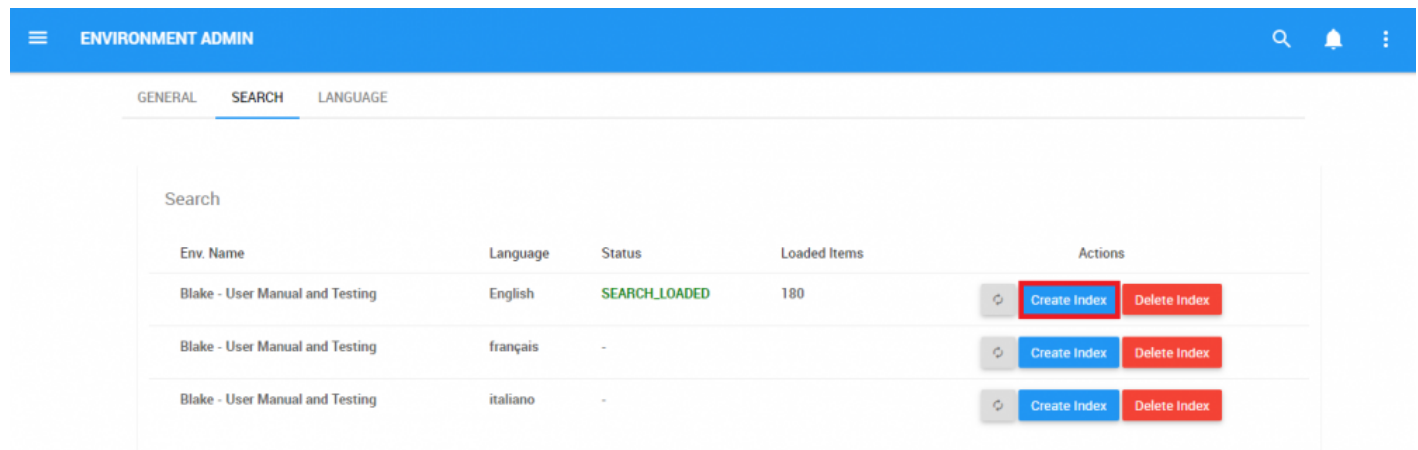
GENERAL **SEARCH** LANGUAGE




3. You will be navigated to the Search page



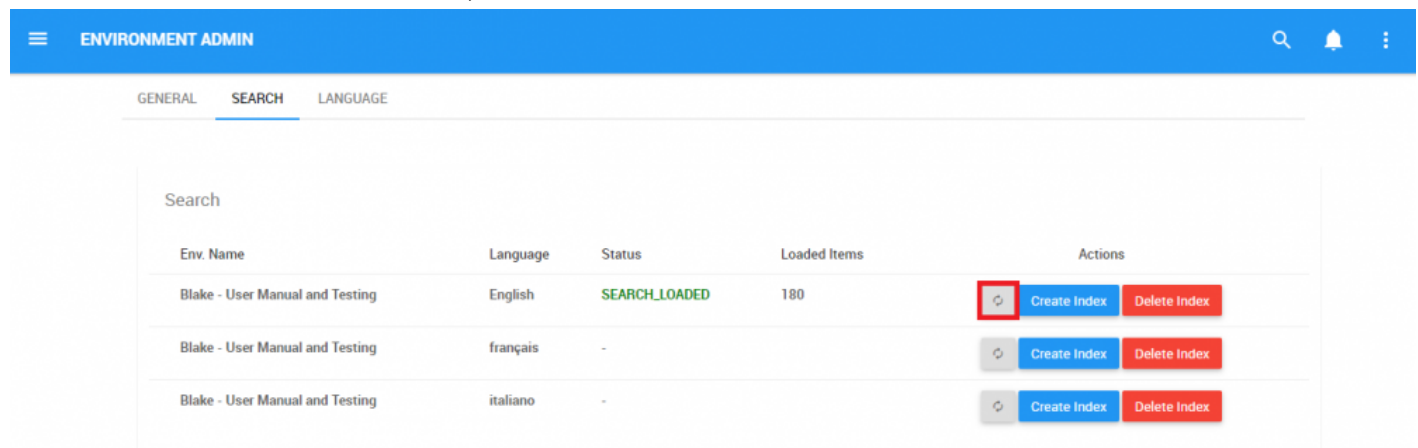
Env. Name	Language	Status	Loaded Items	Actions
Blake - User Manual and Testing	English	SEARCH_LOADED	180	 Create Index Delete Index
Blake - User Manual and Testing	français	-		 Create Index Delete Index
Blake - User Manual and Testing	italiano	-		 Create Index Delete Index




4. To create the Index, select the icon



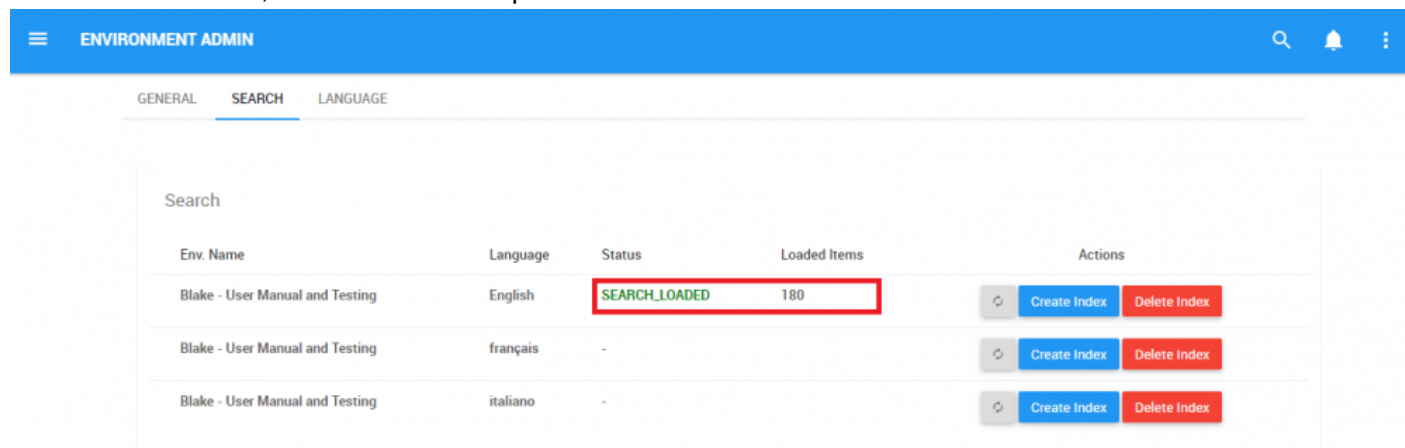
Env. Name	Language	Status	Loaded Items	Actions
Blake - User Manual and Testing	English	SEARCH_LOADED	180	 Create Index Delete Index
Blake - User Manual and Testing	français	-		 Create Index Delete Index
Blake - User Manual and Testing	italiano	-		 Create Index Delete Index

5. After the index has been created, select the refresh icon



Env. Name	Language	Status	Loaded Items	Actions
Blake - User Manual and Testing	English	SEARCH_LOADED	180	 Create Index Delete Index
Blake - User Manual and Testing	français	-		 Create Index Delete Index
Blake - User Manual and Testing	italiano	-		 Create Index Delete Index

6. Once the refresh, the status of the upload will be reflected within the “Status” and “Loaded Items” column



ENVIRONMENT ADMIN					
GENERAL SEARCH LANGUAGE					
Search					
Env. Name	Language	Status	Loaded Items	Actions	
Blake - User Manual and Testing	English	SEARCH_LOADED	180		Create Index Delete Index
Blake - User Manual and Testing	français	-	0		Create Index Delete Index
Blake - User Manual and Testing	italiano	-	0		Create Index Delete Index

* 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 or 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.

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

Language

Interface Language

English

Content Language

English

4. It will generate a drop-down menu featuring all the languages that you have been given access to.

Interface Language

English

English

Français

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.

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.)

9.2.1 Home Page Widgets

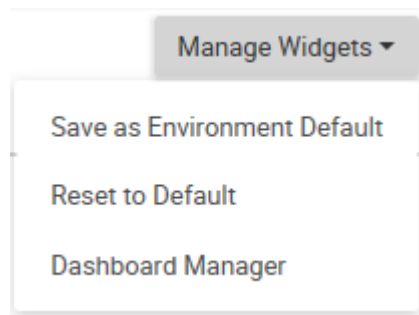
Environment Admins can select the default Widget layout for environment users. Selecting the default layout will allow environment admins to control the initial settings of users Home pages, as well as provide the template should users reset their home page.

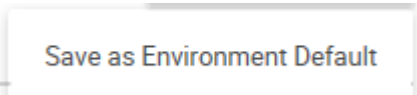
To Set a Home Page Widget Layout as a default layout, please see the steps below:

1. Log into the EPC

2. Navigate to and select the  icon

3. This will generate a drop down menu



4. Select  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](#).

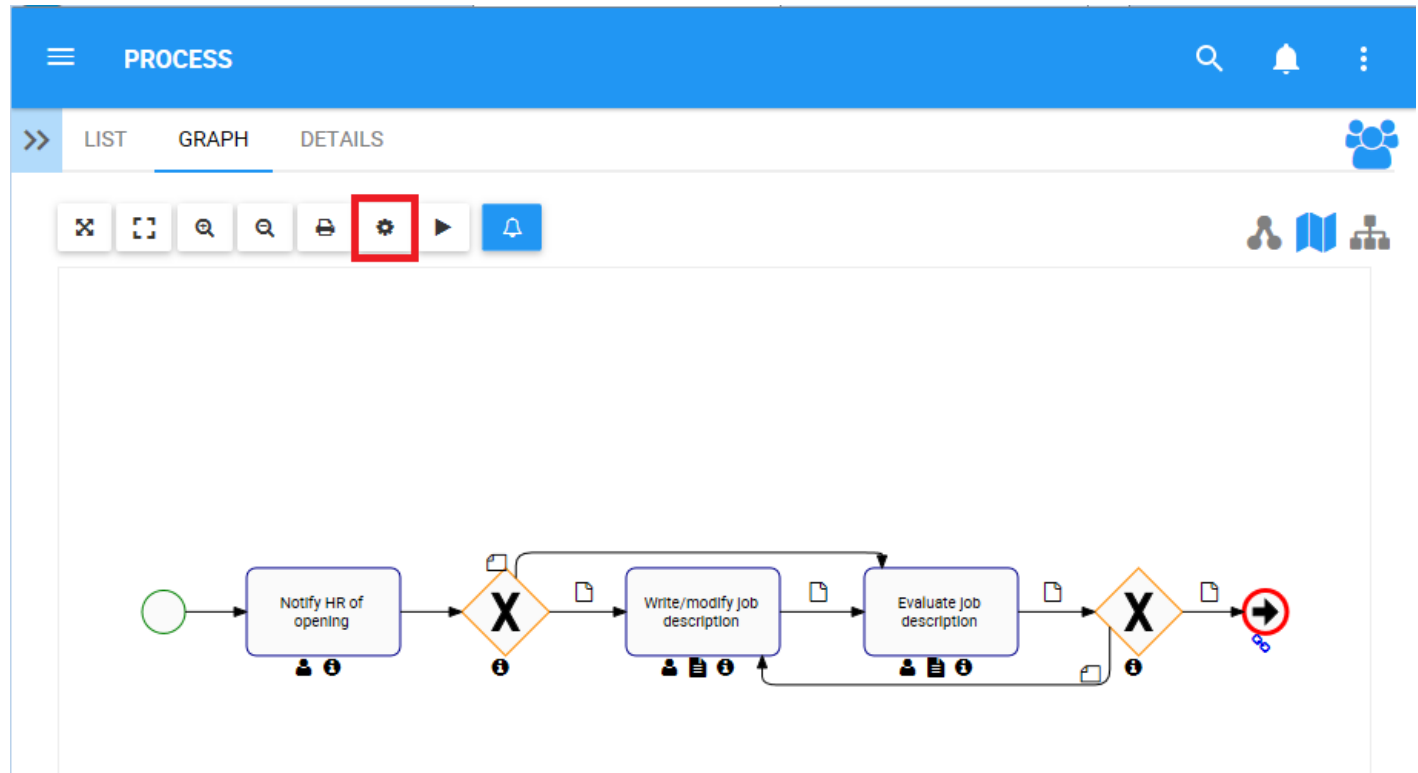
9.2.2 Process Map Graph Options

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

6. Select the **Save as Environment Default** icon and the settings will be saved

×

Map options

General

Display:

GRAPH

▼

Highlight:

NONE

▼

Swimlanes Matrix X:

ROLES (3)

▼

Node Color:

ENABLED

▼

Swimlanes Matrix Y:

ASSETS

▼

Performance Color :

DISABLED

▼

Expand IPL:

ENABLED

▼

Shape Type:

BPMN 2.0

▼

Sub-Process and
Reference Inline
Explosion :

DISABLED

▼

Group by:

NONE

▼

Dedicated Pools:

DISABLED

▼

Auto Layout :

ENABLED

▼

RASCI-VS Filter

+

Icons & Annotations

+

Save as Environment Default

Reset to Default

Close

Save changes

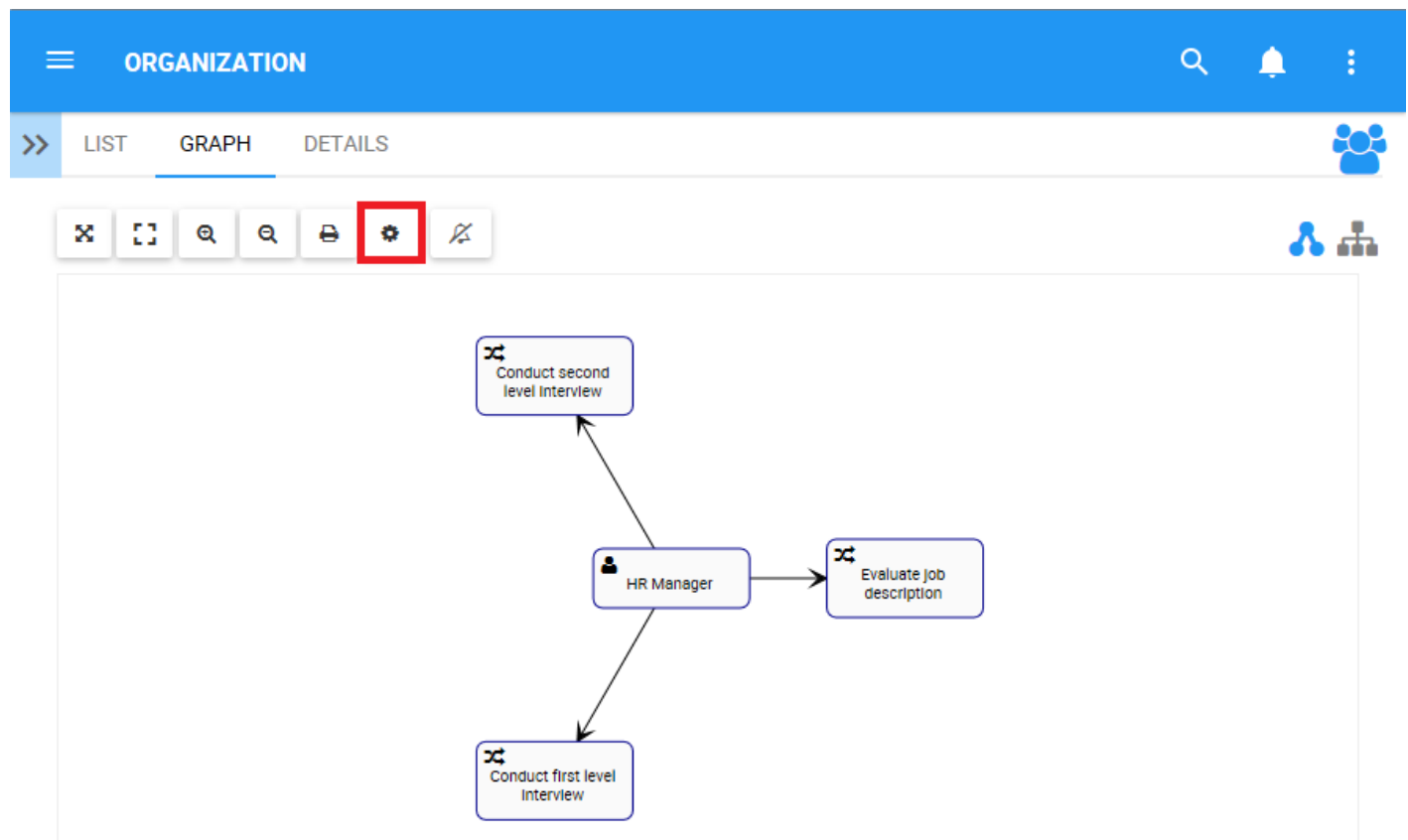
9.2.3 Impact Graph Options

Environment Admins have the ability to set the Impact Graph default layouts. Selecting the default layout will allow environment admins to control the initial setting of Impact Graph viewers. The Impact Graph is available in **all** modules.

To Set Impact Graph default settings, please see the steps below:

1. Login to the EPC
2. Select a an item you desire to view in an Impact Graph within any module
3. For this example, navigate to a role within the Organization Module and view it in an Impact Graph

4. Select the “Options” icon 



5. Select the desired settings that you would like to have set at the Graph's default settings

6. Select the **Save as Environment Default** icon and the settings will be saved

Map options ×

General —

Filter: TASK ▼

Save as Environment Default **Reset to Default** **Close** **Save changes**

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.

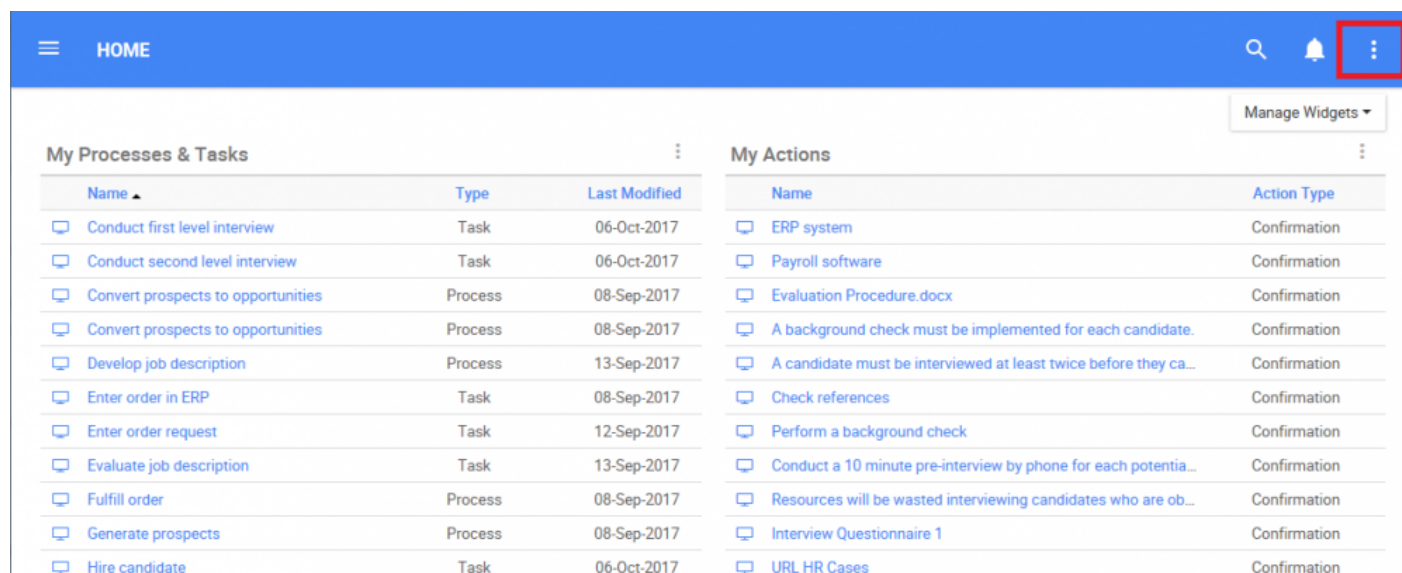
To assure that System Administrators can oversee and maintain the EPC effectively, they are provided with a variety of responsibilities which can be classified as follows:

1. [General](#)
2. [Environment](#)
3. [Users](#)
4. [Groups](#)
5. [Search](#)
6. [Language](#)
7. [Risk](#)
8. [Attributes](#)
9. [Advanced](#)
10. [Modeler](#)

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

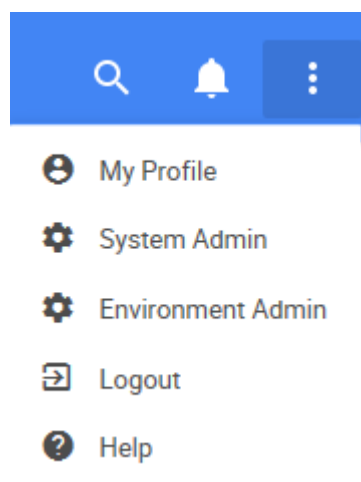


The screenshot shows the HOME dashboard. The top navigation bar is blue with a hamburger menu icon, the word 'HOME', a search icon, a bell icon, and a three-dot menu icon (highlighted with a red box). Below the navigation bar, there are two main sections: 'My Processes & Tasks' and 'My Actions'. Each section has a table of items.

Name	Type	Last Modified
Conduct first level interview	Task	06-Oct-2017
Conduct second level interview	Task	06-Oct-2017
Convert prospects to opportunities	Process	08-Sep-2017
Convert prospects to opportunities	Process	08-Sep-2017
Develop job description	Process	13-Sep-2017
Enter order in ERP	Task	08-Sep-2017
Enter order request	Task	12-Sep-2017
Evaluate job description	Task	13-Sep-2017
Fulfill order	Process	08-Sep-2017
Generate prospects	Process	08-Sep-2017
Hire candidate	Task	06-Oct-2017

Name	Action Type
ERP system	Confirmation
Payroll software	Confirmation
Evaluation Procedure.docx	Confirmation
A background check must be implemented for each candidate.	Confirmation
A candidate must be interviewed at least twice before they ca...	Confirmation
Check references	Confirmation
Perform a background check	Confirmation
Conduct a 10 minute pre-interview by phone for each potentia...	Confirmation
Resources will be wasted interviewing candidates who are ob...	Confirmation
Interview Questionnaire 1	Confirmation
URL HR Cases	Confirmation

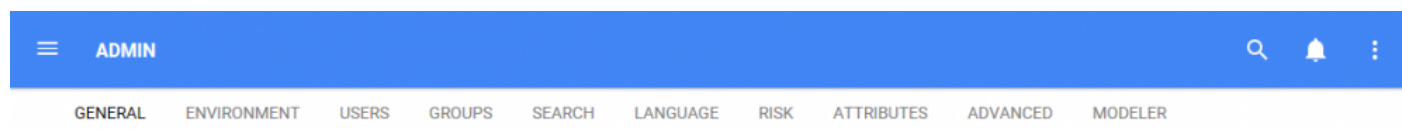
3. Select the icon and it will generate a drop-down menu



The screenshot shows the drop-down menu that appears when the three-dot icon is clicked. The menu options are:

- My Profile
- System Admin
- Environment Admin
- Logout
- Help

4. Select System Admin option and you will be navigated to the “General” section



The screenshot shows the ADMIN dashboard. The top navigation bar is blue with a hamburger menu icon, the word 'ADMIN', a search icon, a bell icon, and a three-dot menu icon. Below the navigation bar, there is a horizontal menu with the following options: GENERAL, ENVIRONMENT, USERS, GROUPS, SEARCH, LANGUAGE, RISK, ATTRIBUTES, ADVANCED, and MODELER. The 'GENERAL' option is selected and highlighted.

10.1 General

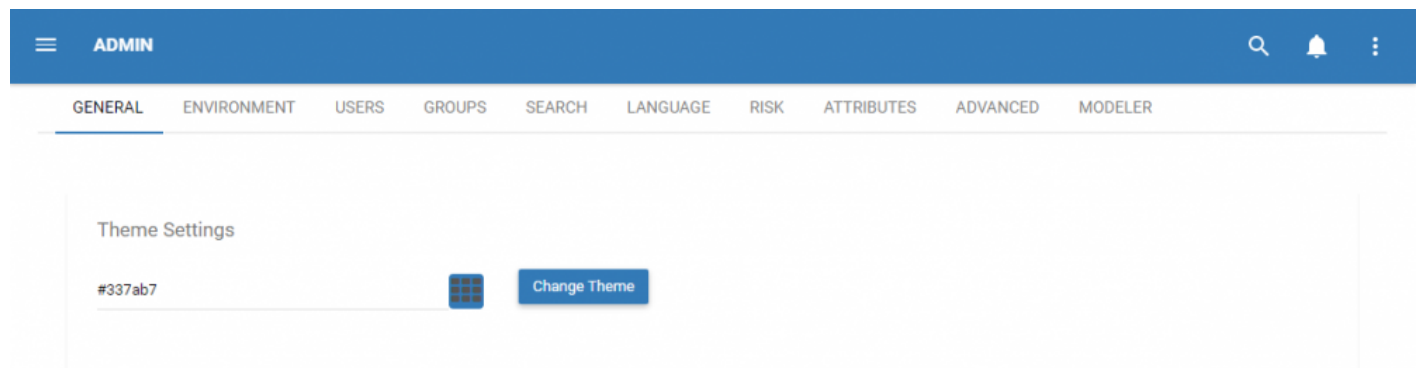
The General tab in the System Admin has three sections

1. [Theme Settings](#) allows System Admins to customize the theme color
2. [Publish Queue](#) allows System Admins to view the items that are on the queue as well as to force items to be published
3. [Manage EPC Sessions](#) allows System Admins to view and manage the EPC sessions

10.1.1 Theme Settings

The Theme Settings is featured within the [General tab](#) of the System Admin section.

The Theme Settings 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.

Theme Settings



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

Theme Settings

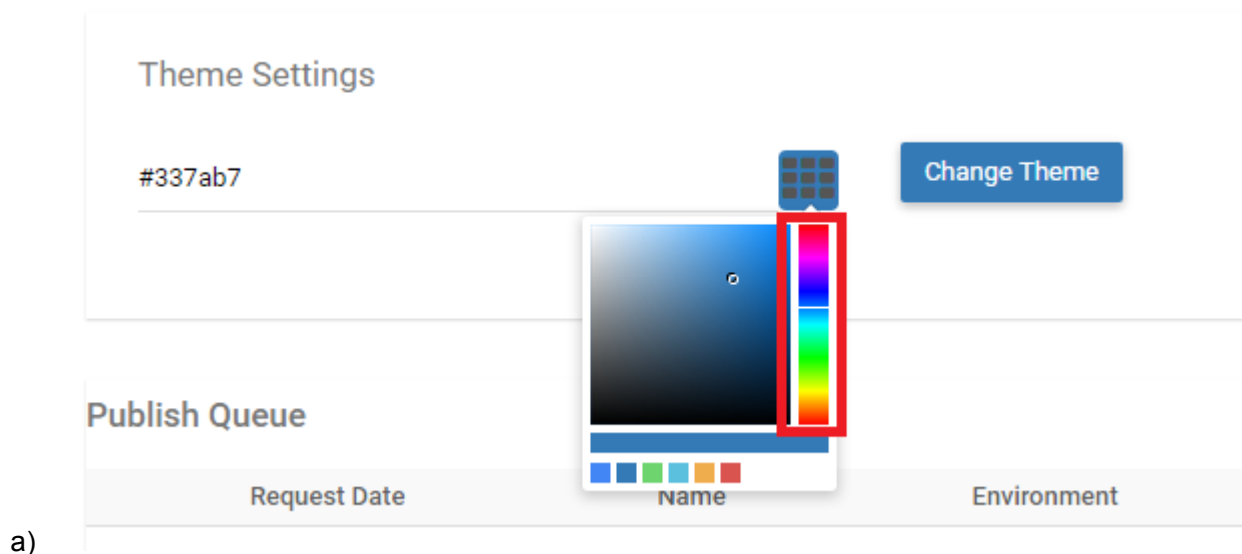
#337ab7

[Change Theme](#)

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



b)

Theme Settings

#337ab7

Change Theme

Publish Queue

Request Date	Name	Environment

c)

Theme Settings

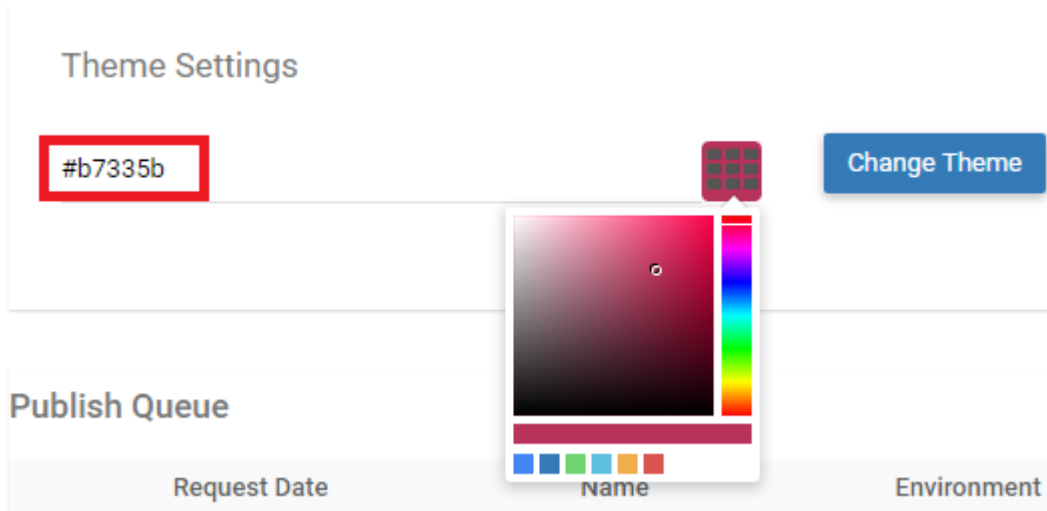
#337ab7

Change Theme

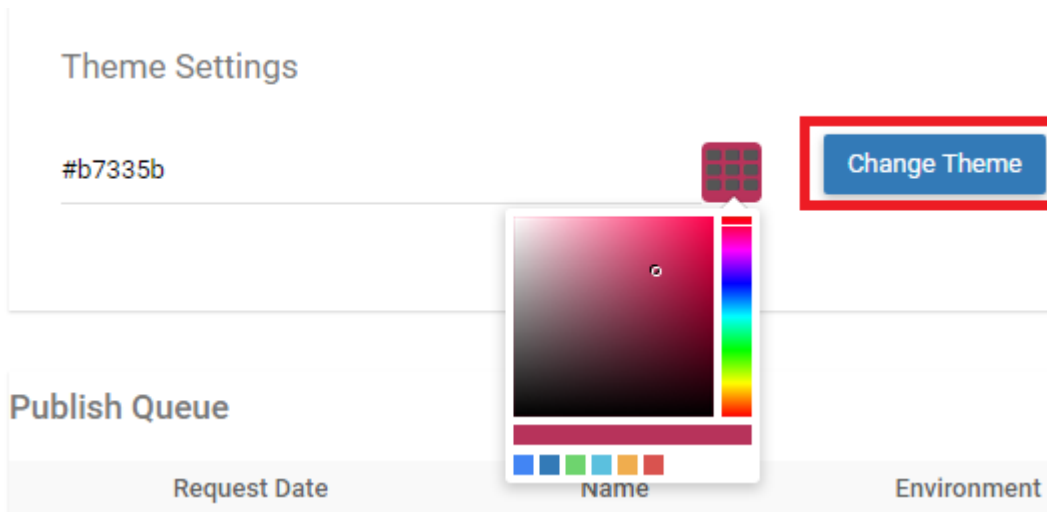
Publish Queue

Request Date	Name	Environment

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 following icon

Theme Settings

#b73356




Change Theme

ii. Select the default color from the “Recent Color” bar


Theme Settings

#b73356



Change Theme


Publish Queue

Request Date	Name	Environment
		


iii. Enter in the default Hex code – **#2196f3** to get the EPC default color

Component	Description
Request Date	The date the item was sent to the Publish Queue
Name	The name of the item
Environment	The environment where the item is located at
Parent Name	The parent name of the item
Error Code	The error code if an error exists
#Retry	The number of “retries” to publish an item

For step-by-step instructions on how to use the Publish Queue, please see the steps below

1. Navigate to the System Admin section on the EPC WebApp
2. Navigate to the General tab, and scroll down to the Publish Queue table
3. Click on the  button to view the most recent Publish Queue list

Publish Queue					Refresh	Force Publish
Request Date	Name	Environment	Parent Name	Error Code	#Retry	
18-Oct-2017	Seek Clinical Panel...	Blake_Red_1	Clinical Panel Process		0	
18-Oct-2017	Review recommend...	Blake_Red_1	Clinical Panel Process		0	
18-Oct-2017	Clams staff discreti...	Blake_Red_1	Clinical Panel Process		0	
18-Oct-2017	CFT service request...	Blake_Red_1	Clinical Panel Process		0	
18-Oct-2017	Mini consultations...	Blake_Red_1	Clinical Panel Process		0	

4. When the items are taking too long to be published, click on the  button to force items in the Publish Queue to be published.

Publish Queue[Refresh](#)[Force Publish](#)

Request Date	Name	Environment	Parent Name	Error Code	#Retry
18-Oct-2017	Seek Clinical Panel...	Blake_Red_1	Clinical Panel Process		0
18-Oct-2017	Review recommend...	Blake_Red_1	Clinical Panel Process		0
18-Oct-2017	Clams staff discreti...	Blake_Red_1	Clinical Panel Process		0
18-Oct-2017	CFT service request...	Blake_Red_1	Clinical Panel Process		0
18-Oct-2017	Mini consultations...	Blake_Red_1	Clinical Panel Process		0

« < 1 2 >

Show: [10](#) - [25](#) - [50](#)

10.1.3 Manage EPC Sessions











The Manage EPC Sessions table is featured within the [General tab](#) of the System Admin section.

The Manage EPC Sessions table allows System Admins to view **all sessions** that are currently opened and in use.

Managing EPC Sessions is used by System Admins when a restricted number of sessions can be opened at the same time. For example, only ten sessions can be opened at the same time, and there are currently 10 users logged into EPC. When User 11 needs to log in, the System Admin can close the sessions that are not currently in use but were left opened to allow User 11 to log in into EPC.

Under this section, the System Admin is able to:

1. [Sort](#) the table with the EPC Sessions
2. [Filter](#) the table with the EPC Sessions
3. [Close](#) opened EPC sessions

Name	Login Session ▲	Type	Host	Environment	Close Session
Administrator (epcadmin)	10/18/2017 08:14:46.510	PORTAL		IA	
Manogna Gali (manogna)	10/18/2017 09:26:36.517	PORTAL		Risk Module	
maria rivera (maria)	10/18/2017 09:29:09.253	PORTAL		maria_training	
Manogna Gali (manogna)	10/18/2017 09:33:34.107	PORTAL		Risk Module	
007 SUPPORT (007nadin)	10/18/2017 09:35:58.337	PORTAL		Nadin	
vbmread read (vbmread)	10/18/2017 09:47:07.813	PORTAL		VBM	
Manogna Gali (manogna)	10/18/2017 09:48:31.657	PORTAL		Risk Module	
vbmread read (vbmread)	10/18/2017 09:49:11.777	PORTAL		VBM	
Administrator (epcadmin)	10/18/2017 09:53:04.400	MODELER	WSDEV021	Nadin	
vbmread read (vbmread)	10/18/2017 09:56:52.987	PORTAL		VBM	

« < 1 2 >

10.1.3.1 Sorting

Sorting allows System Admins to classify the EPC Sessions 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 “Manage EPC Sessions”:

Filter	Details
Name	Allows System Admins to sort EPC Sessions by its name
Login Session	Allows System Admins to sort the Login Sessions chronically by date and time
Type	Allows System Admins to sort EPC sessions by its type
Host	Allows System Admins to sort EPC Modeler sessions by its host IP address
Environment	Allows System Admins to sort EPC Sessions by its environment

How to use “Sorting” Function

1. Navigate to the System Admin section
2. Navigate the General Tab
3. Scroll down to the Manage EPC Session section and 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”.

Manage EPC Sessions

Name ▾	Login Session	Type	Host	Environment	Close Session
001 Review (001nadin)	10/18/2017 13:54:44.743	PORTAL		Nadin	
001 Review (001nadin)	10/18/2017 13:47:49.603	PORTAL		Nadin	
001 Review (001nadin)	10/18/2017 13:36:08.910	PORTAL		Nadin	
Balake Lové (balake)	10/18/2017 13:55:14.697	PORTAL		Blake_Red_1	
Administrator (epcadmin)	10/18/2017 13:54:06.950	PORTAL		VBM	
Administrator (epcadmin)	10/18/2017 13:49:11.813	MODELER	WSDEV017-PC	VBM	
Manogna Gali (manogna)	10/18/2017 13:34:59.430	PORTAL		Risk Module	
maria rivera (maria)	10/18/2017 13:39:06.280	PORTAL		maria_training	
Super User (superuser)	10/18/2017 13:37:29.977	MODELER	ITC-WKS033	Risk Module	
vbmread read (vbmread)	10/18/2017 13:52:27.773	PORTAL		VBM	
⏪ < 1 2 > ⏩					
Show: 10 - 25 - 50					

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

Manage EPC Sessions

Name ▾	Login Session	Type	Host	Environment	Close Session
vbmread read (vbmread)	10/18/2017 13:52:27.773	PORTAL		VBM	
vbmread read (vbmread)	10/18/2017 13:41:51.577	PORTAL		VBM	
vbmread read (vbmread)	10/18/2017 13:52:02.820	PORTAL		VBM	
Super User (superuser)	10/18/2017 13:37:29.977	MODELER	ITC-WKS033	Risk Module	
maria rivera (maria)	10/18/2017 13:39:06.280	PORTAL		maria_training	
Manogna Gali (manogna)	10/18/2017 13:34:59.430	PORTAL		Risk Module	
Administrator (epcadmin)	10/18/2017 13:54:06.950	PORTAL		VBM	
Administrator (epcadmin)	10/18/2017 13:49:11.813	MODELER	WSDEV017-PC	VBM	
Balake Lové (balake)	10/18/2017 13:55:14.697	PORTAL		Blake_Red_1	
001 Review (001nadin)	10/18/2017 13:54:44.743	PORTAL		Nadin	
⏪ < 1 2 > ⏩					
Show: 10 - 25 - 50					

10.1.3.2 Filtering

System Admins can **Filter** the EPC sessions by:

Column	Options
Name	Textual search for any existing name of an EPC Session Name
Type	Portal Modeler
Host	Textual search for any existing name of a Host
Environment	Textual search for any existing name of an environment

The Filtering section will cover the following:

1. How to [Add Filters](#)
2. How to [Remove Filters](#)
3. How to [Combine Filters](#)

10.1.3.2.1 Add Filter

You can add filters to see the items of your choice. **Type** what you are looking for, or **select** the filter in the drop-down menu.

How to Add Filter

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

Manage EPC Sessions

Name	Login Session	Type	Host	Environment	Close Session
Manogna Gali (manogna)	10/18/2017 13:34:59.430	PORTAL		Risk Module	
001 Review (001nadin)	10/18/2017 13:36:08.910	PORTAL		Nadin	
Super User (superuser)	10/18/2017 13:37:29.977	MODELER	ITC-WKS033	Risk Module	
maria rivera (maria)	10/18/2017 13:39:06.280	PORTAL		maria_training	
vbmread read (vbmread)	10/18/2017 13:41:51.577	PORTAL		VBM	
001 Review (001nadin)	10/18/2017 13:47:49.603	PORTAL		Nadin	
Administrator (epcadmin)	10/18/2017 13:49:11.813	MODELER	WSDEV017-PC	VBM	
vbmread read (vbmread)	10/18/2017 13:52:02.820	PORTAL		VBM	
vbmread read (vbmread)	10/18/2017 13:52:27.773	PORTAL		VBM	
Administrator (epcadmin)	10/18/2017 13:54:06.950	PORTAL		VBM	

« < 1 2 > »
Show: 10 - 25 - 50

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











Type

PORTAL

MODELER

3. Select the desired filter. For this example, we will select **Portal**

Manage EPC Sessions

Name	Login Session ▲	Type	Host	Environment	Close Session
		PORTAL x			
Manogna Gali (manogna)	10/18/2017 13:34:59.430	PORTAL		Risk Module	
001 Review (001nadin)	10/18/2017 13:36:08.910	PORTAL		Nadin	
maria rivera (maria)	10/18/2017 13:39:06.280	PORTAL		maria_training	
vbmread read (vbmread)	10/18/2017 13:41:51.577	PORTAL		VBM	
001 Review (001nadin)	10/18/2017 13:47:49.603	PORTAL		Nadin	
vbmread read (vbmread)	10/18/2017 13:52:02.820	PORTAL		VBM	
vbmread read (vbmread)	10/18/2017 13:52:27.773	PORTAL		VBM	
Administrator (epcadmin)	10/18/2017 13:54:06.950	PORTAL		VBM	
001 Review (001nadin)	10/18/2017 13:54:44.743	PORTAL		Nadin	
Balake Lové (balake)	10/18/2017 13:55:14.697	PORTAL		Nadin	
<div>« < 1 2 ></div> <div>Show: 10 - 25 - 50</div>					












10.1.3.2.2 Remove Filter

System Administrators are able to **Remove Filters** on the Manage EPC sessions after [adding a filter](#).

How to Remove Filter

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

Manage EPC Sessions

Name	Login Session ▲	Type	Host	Environment	Close Session
		PORTAL 			
001 Review (001nadin)	10/19/2017 08:11:53.193	PORTAL		Nadin	
Administrator (epcadmin)	10/19/2017 08:18:13.277	PORTAL		VBM	
Jodie Holway (jholway)	10/19/2017 09:10:55.117	PORTAL		IA	
Administrator (epcadmin)	10/19/2017 09:14:39.857	PORTAL		VBM	
Manogna Gali (manogna)	10/19/2017 09:27:37.957	PORTAL		Risk Module	
Administrator (epcadmin)	10/19/2017 09:29:51.670	PORTAL		VBM	
maria rivera (maria)	10/19/2017 09:31:46.580	PORTAL		maria_training	
Administrator (epcadmin)	10/19/2017 09:44:41.987	PORTAL		VBM	
Tim Shaw (timshaw1)	10/19/2017 09:49:16.550	PORTAL		Risk Module	
Administrator (epcadmin)	10/19/2017 09:57:20.270	PORTAL		VBM	
<div>« < 1 2 > »</div> <div>Show: 10 - 25 - 50</div>					


10.1.3.2.3 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.











10.1.3.3 Closing

System Admins can **close** any EPC opened session. By closing a session, the user logged in to the session has no longer access to use the EPC. In order to regain access, they have to log back into the EPC with their respected credentials.

This function is useful for System Admins when they have a limited amount of sessions that can be opened at the same time. For example, only ten sessions can be opened at the same time, and there are currently 10 users logged into EPC. When User 11 needs to log in, the System Admin can close the sessions that are not currently in use but were left opened to allow User 11 to log in into EPC.

1. To close an EPC session, select this icon 

Manage EPC Sessions

Name	Login Session	Type	Host	Environment	Close Session
Administrator (epcadmin)	10/18/2017 08:14:46.510	PORTAL		IA	
Manogna Gali (manogna)	10/18/2017 09:26:36.517	PORTAL		Risk Module	
maria rivera (maria)	10/18/2017 09:29:09.253	PORTAL		maria_training	
Manogna Gali (manogna)	10/18/2017 09:33:34.107	PORTAL		Risk Module	
007 SUPPORT (007nadin)	10/18/2017 09:35:58.337	PORTAL		Nadin	
vbmread read (vbmread)	10/18/2017 09:47:07.813	PORTAL		VBM	
Manogna Gali (manogna)	10/18/2017 09:48:31.657	PORTAL		Risk Module	
vbmread read (vbmread)	10/18/2017 09:49:11.777	PORTAL		VBM	
Administrator (epcadmin)	10/18/2017 09:53:04.400	MODELER	WSDEV021	Nadin	
vbmread read (vbmread)	10/18/2017 09:56:52.987	PORTAL		VBM	

« < 1 2 > »

2. The “Confirm Session Closure” message will appear. Select “Confirm” to close the session.

Confirm Session Closure

You are about to close a user session. This user would not be able to perform any action until he/she logs in again. Please notify the user to log in again.

Cancel

Confirm

10.2 Environment

System Administrators will be responsible for creating and managing environments within the EPC. In order for a User to access EPC, the System Admin needs to add the user to their respected environment. Users can be assigned to multiple environments.

The Environment tab under the System Admin section displays a table with the List of Environments. Within the Environment tab of the System Admin section, Administrators can do the following:

1. [Add a new environment](#)
2. [Edit existing environments](#)
3. [Delete environments](#)
4. [Add a group to an environment](#)
5. [Add users to an environment](#)
6. [Set Environment Security](#)
7. [Sort Environment Table](#)
8. [Filter Environment Table](#)

The screenshot displays the 'ADMIN' section of the EPC10 WebApp, specifically the 'ENVIRONMENT' tab. The interface includes a top navigation bar with a search icon, a notification bell, and a menu icon. Below the navigation bar, a horizontal menu lists various system administration options: GENERAL, ENVIRONMENT (selected), USERS, GROUPS, SEARCH, LANGUAGE, RISK, ATTRIBUTES, ADVANCED, and MODELER. The main content area is titled 'List of Environments' and features a '+ Add New Environment' button. A table lists the following environments: Ofeng_new_env, Alex - Import Visio Cavok, Alex - Performance, Blake_Red_1, Blake_Red_2, Blake_Red_3, Environment_Tim_Test, feng_test_env, GRC, and IA. Each row in the table has a set of icons for editing, deleting, and adding users. At the bottom of the table, there is a pagination control showing '1' of 2 pages and a 'Show: 10 - 25 - 50' option.

Name	Actions
Ofeng_new_env	[Edit] [Delete] [Add Users]
Alex - Import Visio Cavok	[Edit] [Delete] [Add Users]
Alex - Performance	[Edit] [Delete] [Add Users]
Blake_Red_1	[Edit] [Delete] [Add Users]
Blake_Red_2	[Edit] [Delete] [Add Users]
Blake_Red_3	[Edit] [Delete] [Add Users]
Environment_Tim_Test	[Edit] [Delete] [Add Users]
feng_test_env	[Edit] [Delete] [Add Users]
GRC	[Edit] [Delete] [Add Users]
IA	[Edit] [Delete] [Add Users]

10.2.1 Add Environment

Under the Environment tab, System Admins are responsible to create environments.

How to Add an Environment

1. Login to the EPC
2. Navigate to the System Admin Section
3. Select the Environment tab within the System Admin Section. You will be navigated to the Environment management page.

ADMIN

GENERAL ENVIRONMENT USERS GROUPS SEARCH LANGUAGE RISK ATTRIBUTES ADVANCED MODELER

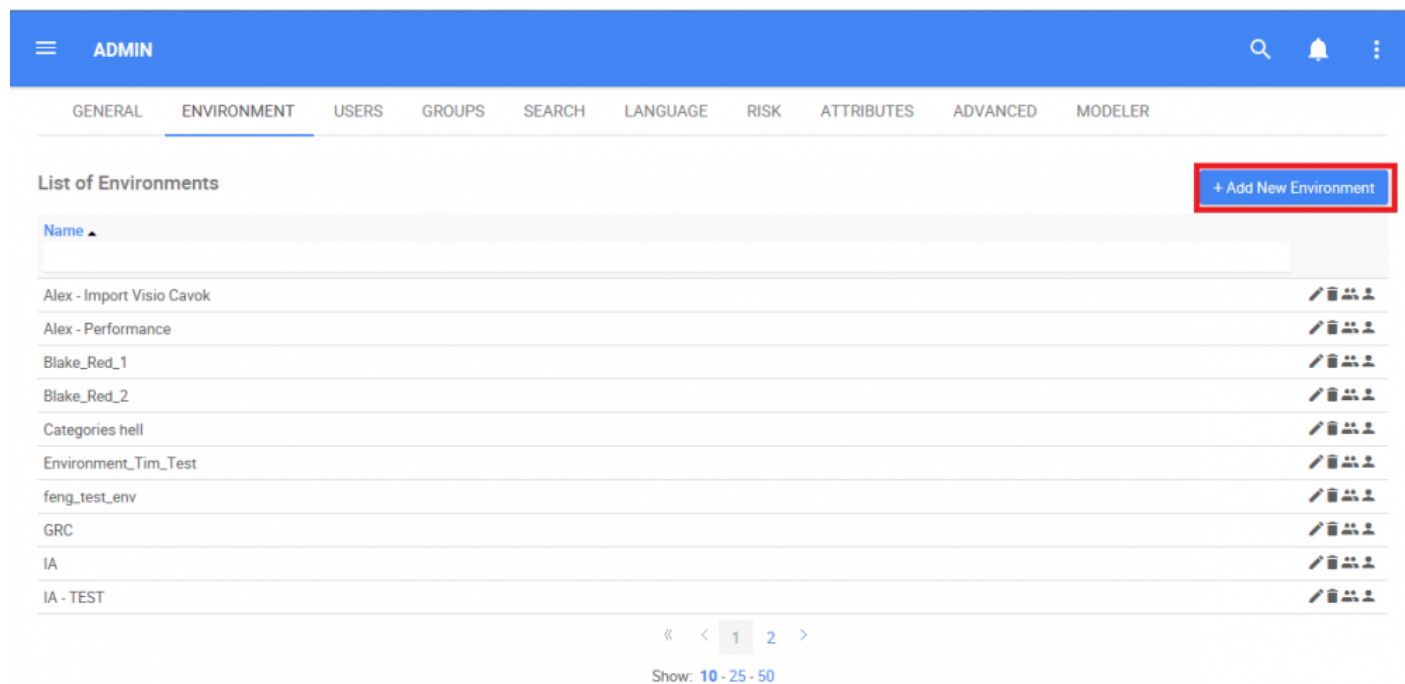
List of Environments + Add New Environment

Name ▲	
Alex - Import Visio Cavok	✎ 🗑 👤
Alex - Performance	✎ 🗑 👤
Blake_Red_1	✎ 🗑 👤
Blake_Red_2	✎ 🗑 👤
Categories hell	✎ 🗑 👤
Environment_Tim_Test	✎ 🗑 👤
feng_test_env	✎ 🗑 👤
GRC	✎ 🗑 👤
IA	✎ 🗑 👤
IA - TEST	✎ 🗑 👤

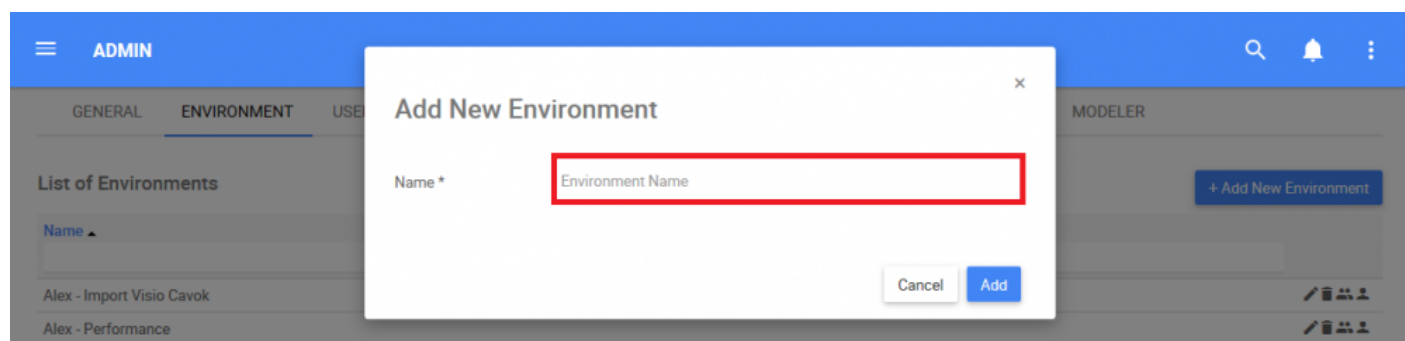
« < 1 2 >

Show: 10 - 25 - 50

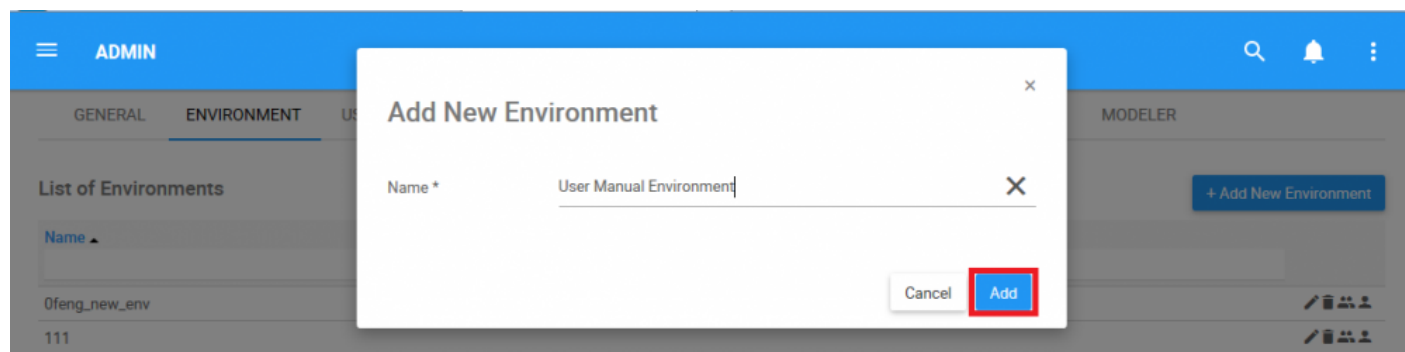
4. Navigate the cursor and select the + Add New Environment box



5. This will create a pop-up window allowing System Admins to fill in the appropriate information



6. For this example, the name of the new environment is "User Manual Environment." Select the "Add" button to create the new environment

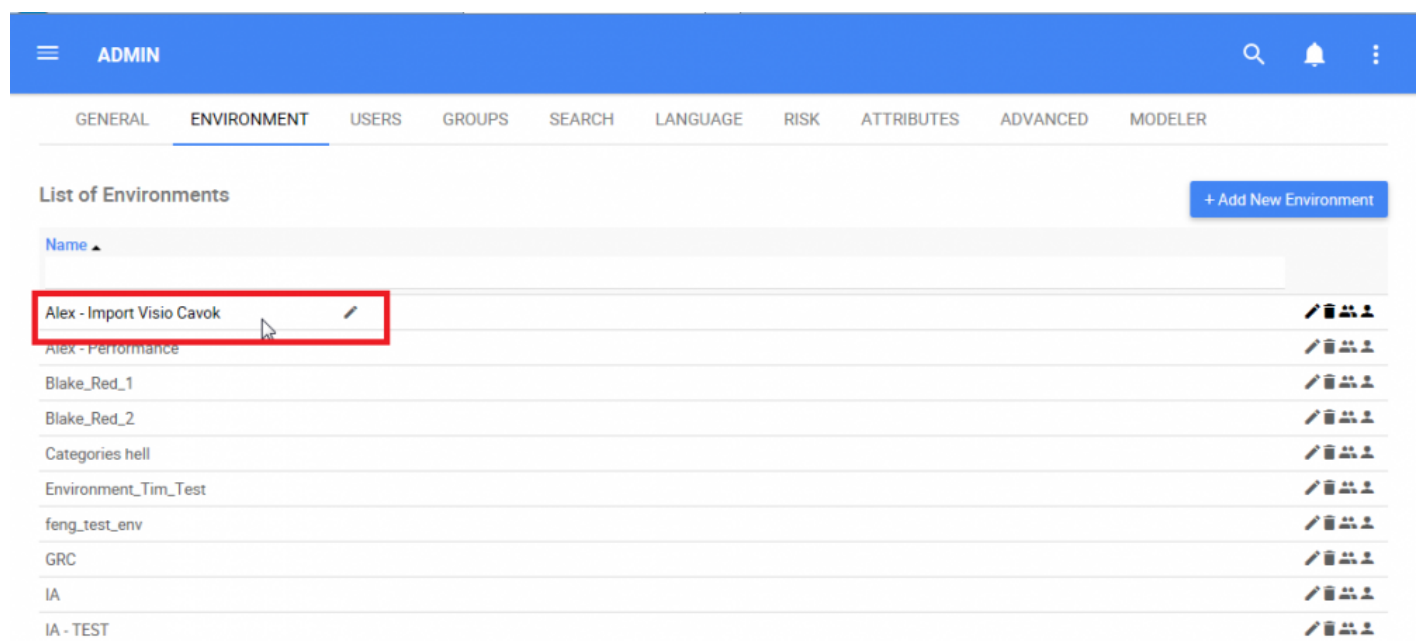


10.2.2 Edit Existing Environment

When needed, administrators can edit environment 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 the name of the Environment directly within the Environment list. Simply click on the desired Environment name and type in the desired edit.

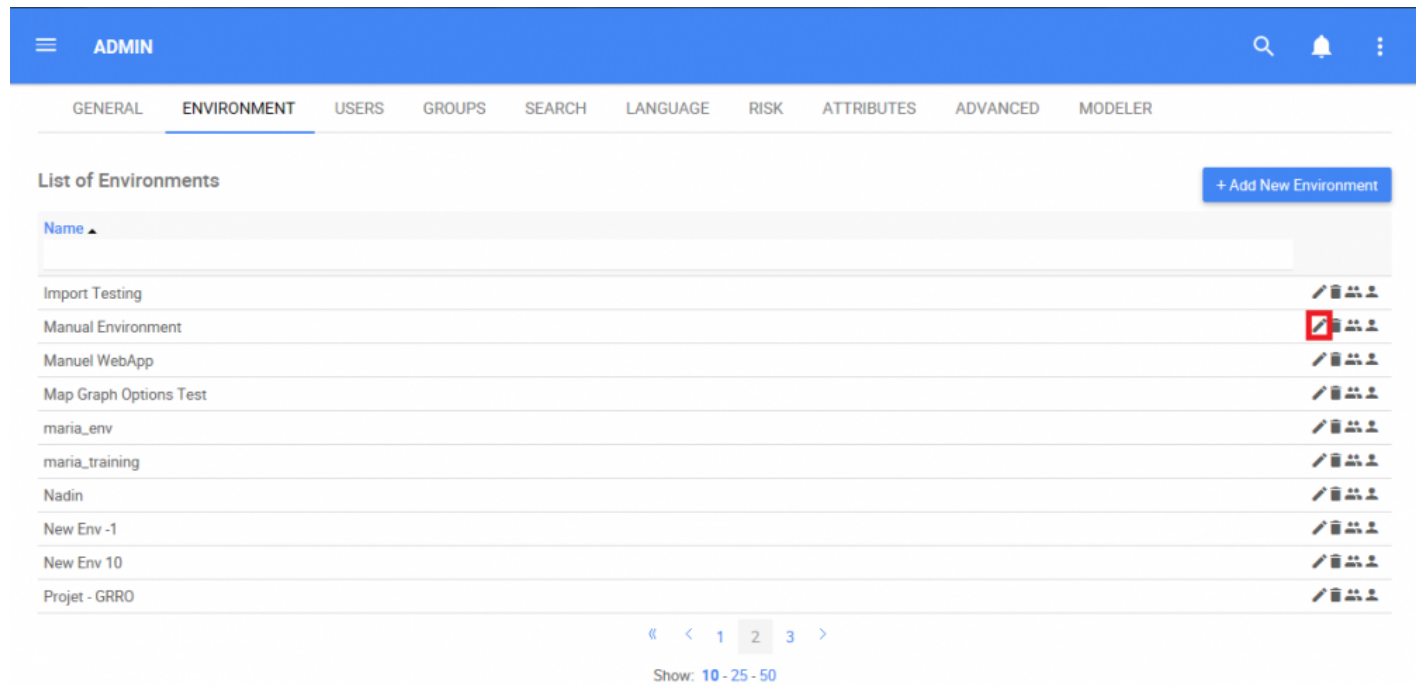


The screenshot shows the 'ADMIN' section of the EPC10 WebApp. The 'ENVIRONMENT' tab is selected. Below the navigation bar, there is a 'List of Environments' section with a '+ Add New Environment' button. A table lists various environments. The first row, 'Alex - Import Visio Cavok', is highlighted with a red box, and a mouse cursor is pointing at the edit icon (pencil) next to it. The table also includes other environments like 'Alex - Performance', 'Blake_Red_1', 'Blake_Red_2', 'Categories hell', 'Environment_Tim_Test', 'feng_test_env', 'GRC', 'IA', and 'IA - TEST'.

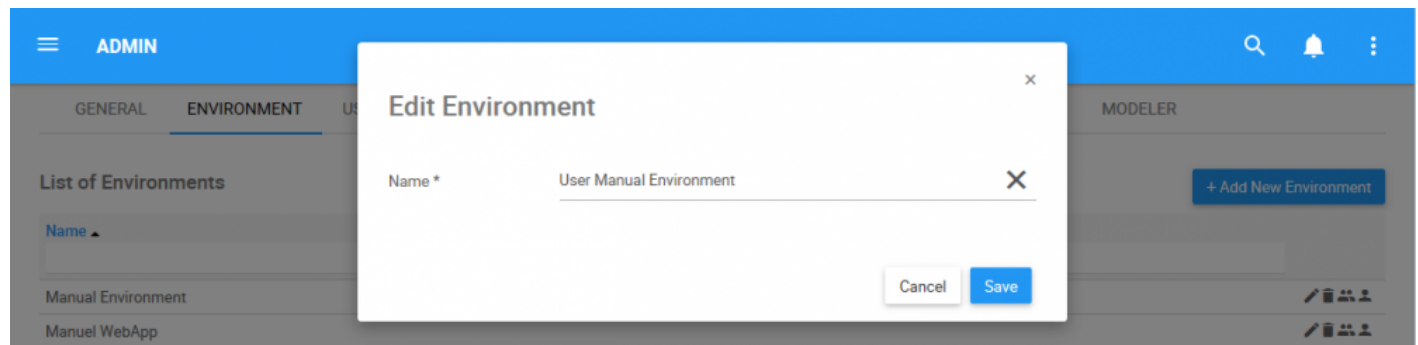
Name	Actions
Alex - Import Visio Cavok	[Edit] [Add] [Delete] [Share]
Alex - Performance	[Edit] [Add] [Delete] [Share]
Blake_Red_1	[Edit] [Add] [Delete] [Share]
Blake_Red_2	[Edit] [Add] [Delete] [Share]
Categories hell	[Edit] [Add] [Delete] [Share]
Environment_Tim_Test	[Edit] [Add] [Delete] [Share]
feng_test_env	[Edit] [Add] [Delete] [Share]
GRC	[Edit] [Add] [Delete] [Share]
IA	[Edit] [Add] [Delete] [Share]
IA - TEST	[Edit] [Add] [Delete] [Share]

Editing Window

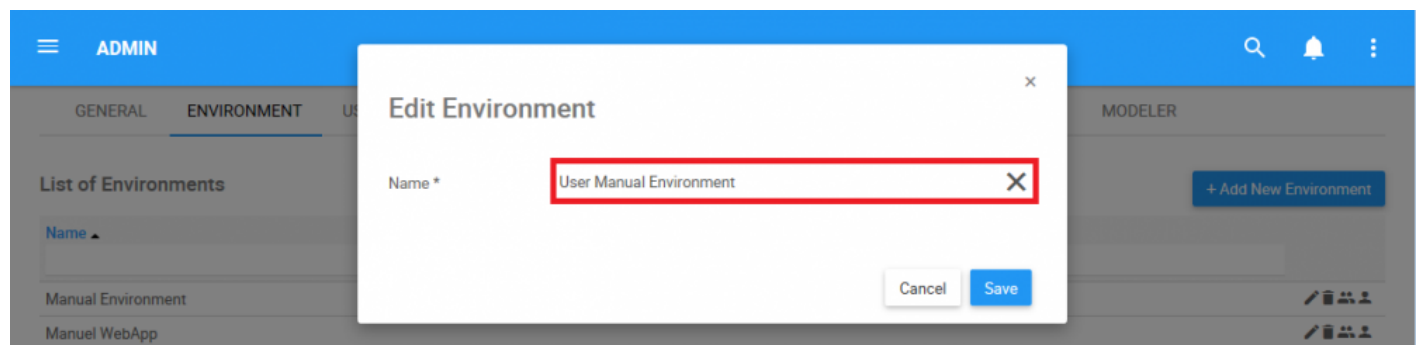
1. For further editing capabilities, navigate the cursor and select the  icon for the environment you want to edit



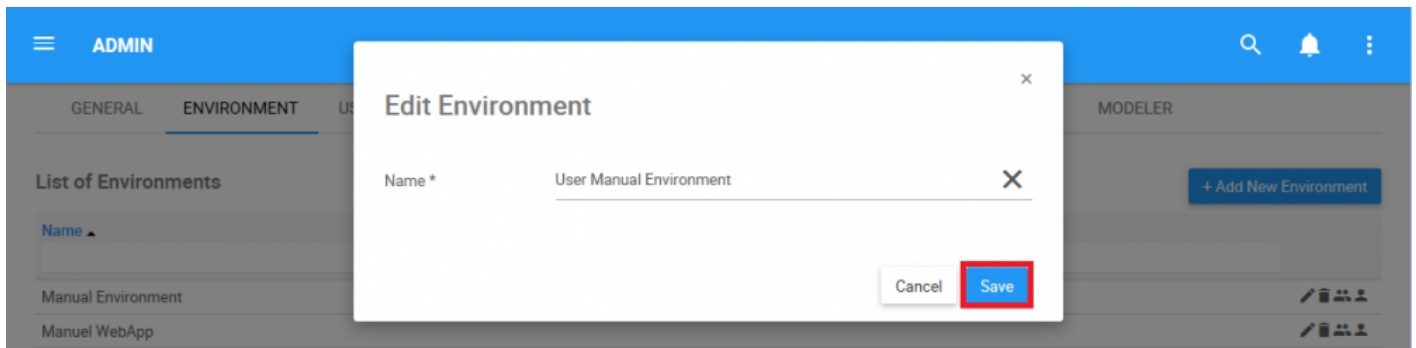
2. The following box will pop-up



3. Click on the "Name box" and edit the name of the environment



4. Select the “Save” button to confirm changes

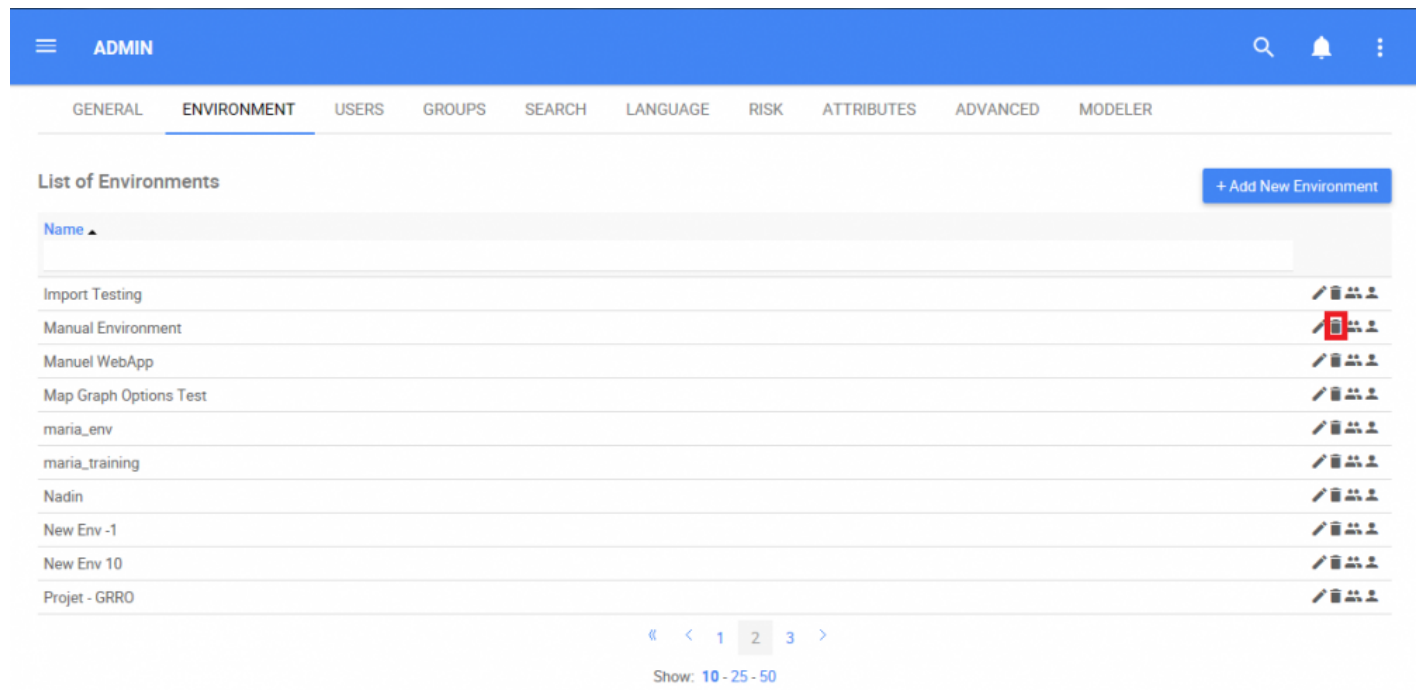


10.2.3 Delete Environment

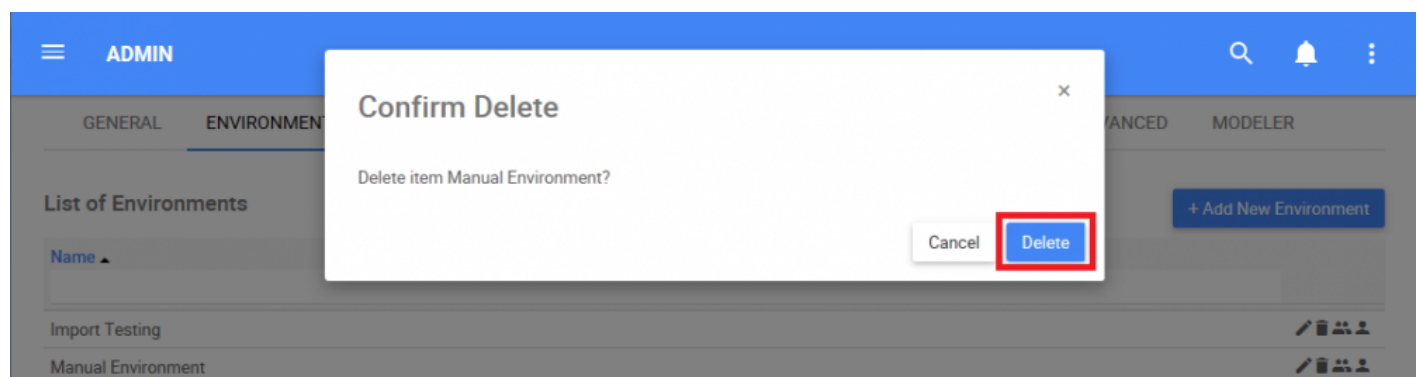
Under the Environment tab, System Admins can delete environments.

How to Delete an Environment

1. Navigate the cursor and select the  icon for the environment you want to delete



2. The following box will appear and you will be able to delete the environment by clicking on the “Delete” box




10.2.4 Add Group to Environment

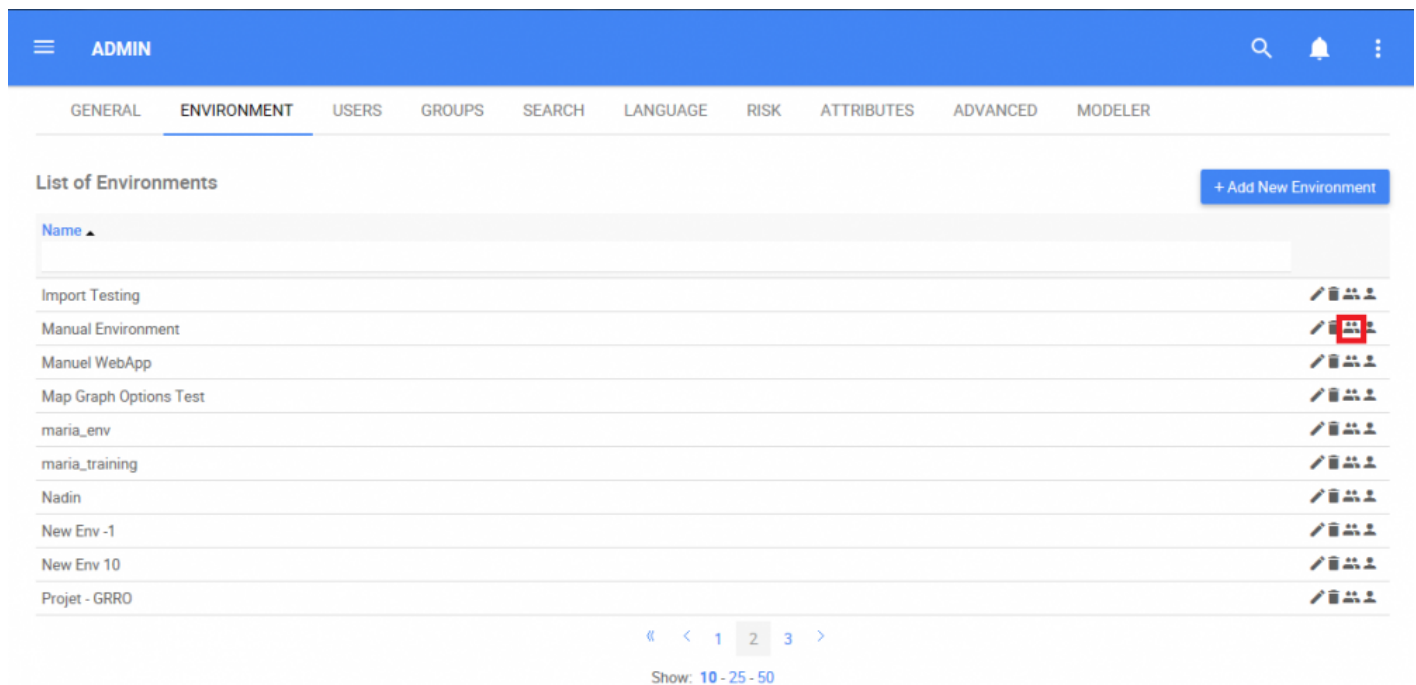
Under the Environment tab, System Admins can add [Groups](#) to environments. Groups can be used by System Admins to create classifications to provide variable access and different layers of security, where only the users added to the group can access the information.

✿ All deny access' on an environment override any other permission awarded on a group.





















. All deny access' on an environment override any other permission awarded on a group.

How to Add a Group to an Environment

1. Navigate the cursor and select the  icon for the environment you want to add a group to

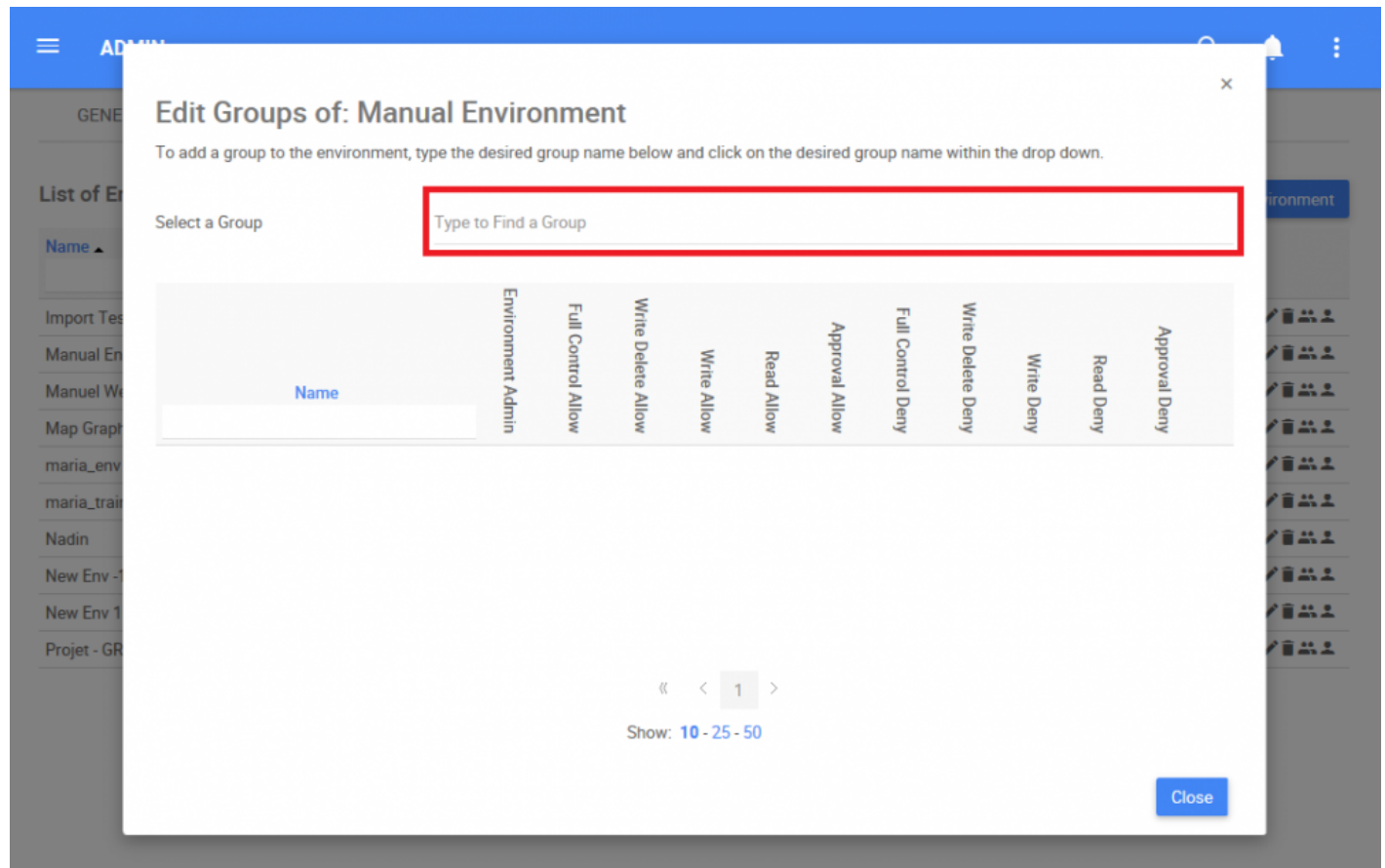


The screenshot shows the 'ADMIN' interface with the 'ENVIRONMENT' tab selected. The 'List of Environments' table contains the following rows:

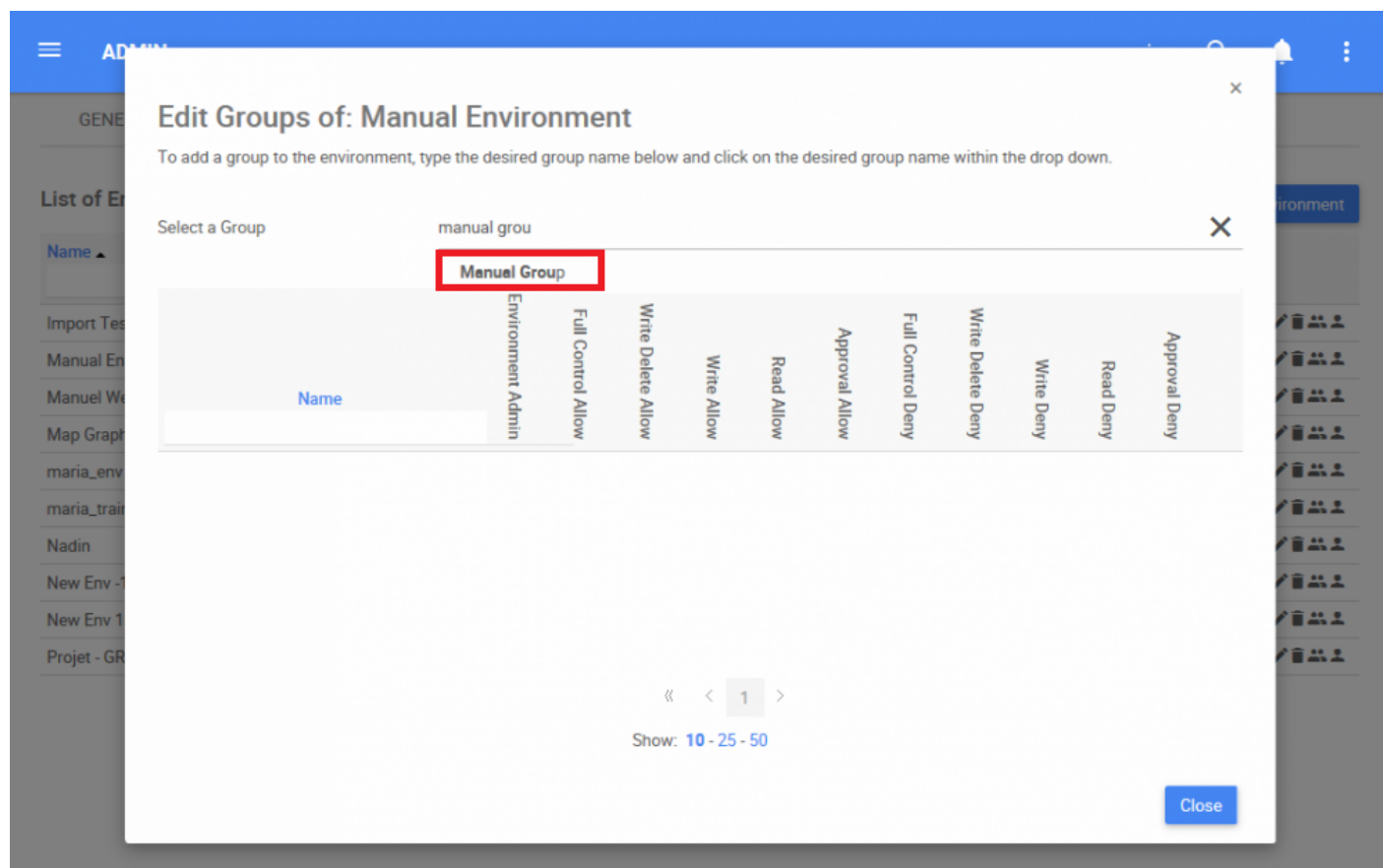
Name ▲	Actions
Import Testing	 
Manual Environment	 
Manuel WebApp	 
Map Graph Options Test	 
maria_env	 
maria_training	 
Nadin	 
New Env -1	 
New Env 10	 
Projet - GRR0	 

Navigation: « < 1 2 3 > Show: 10 - 25 - 50

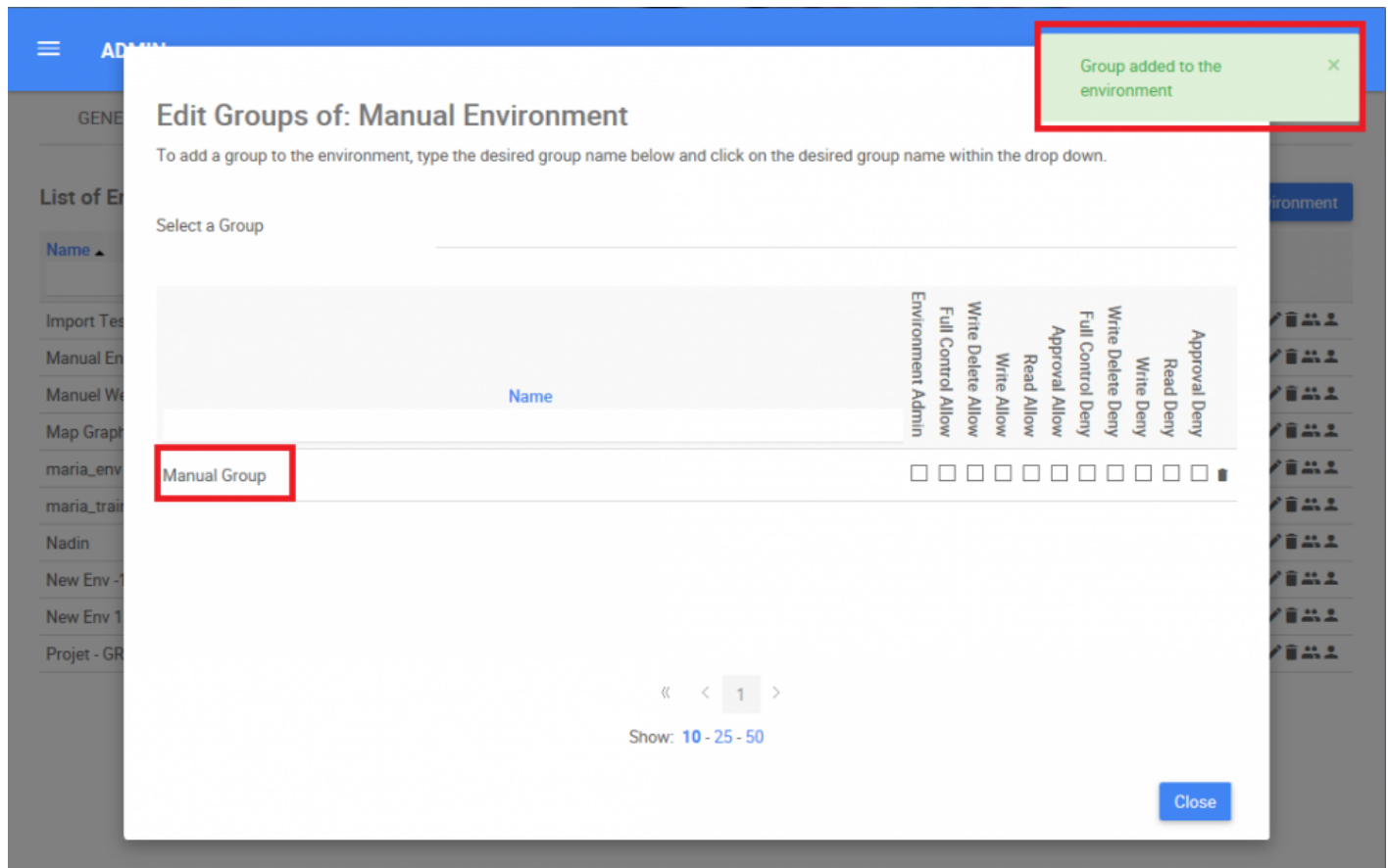
2. Navigate to the “Select a Group” search box
p(banner tip). The list of groups will populate below based on key word typing



3. Type the name of the Group you want to add to the environment. “Double Click” on the group to finish adding it



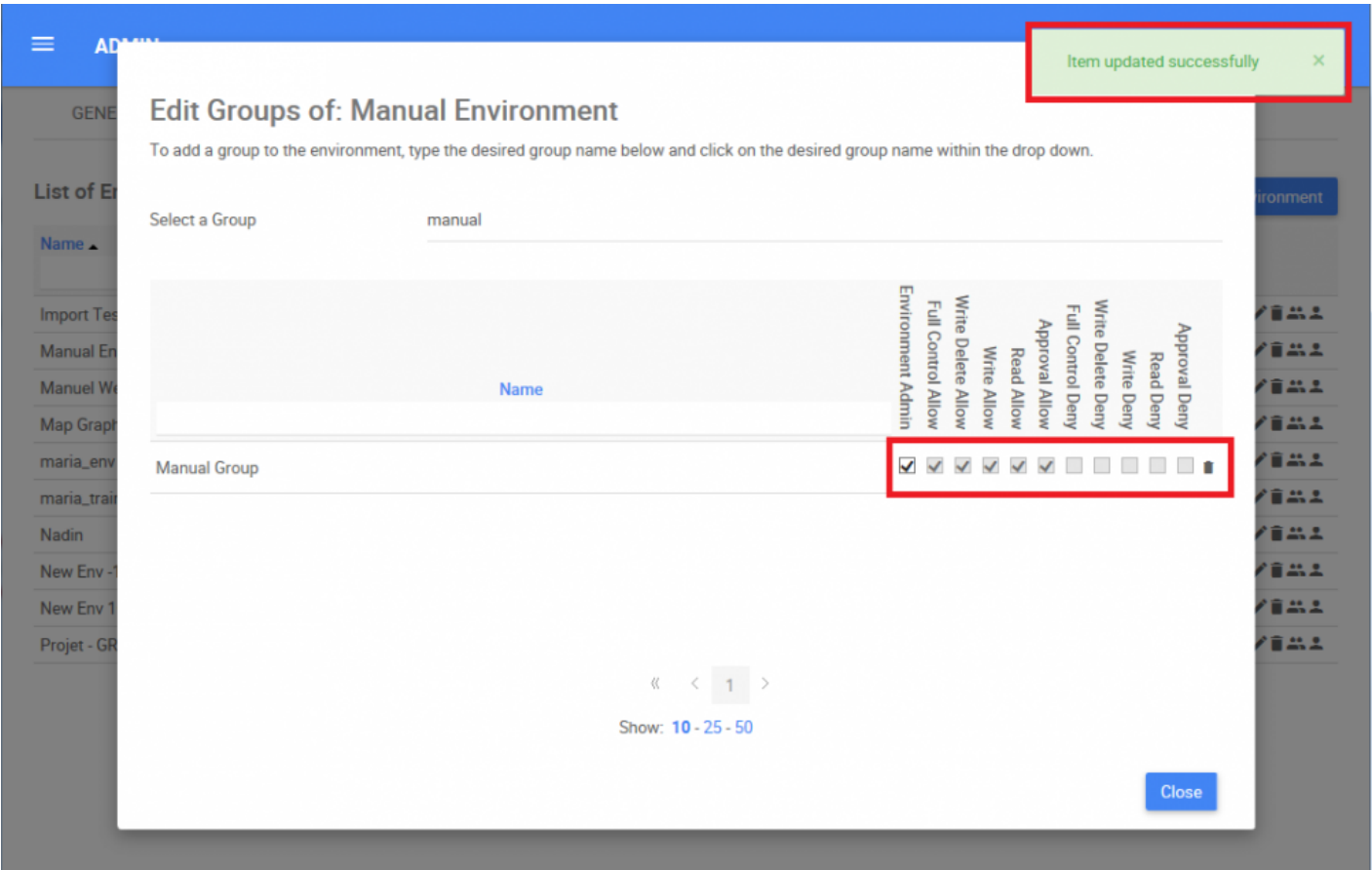
4. The added group will appear on the following table. The system admin will receive an automatic notification when the group is successfully added
p(banner important). This process may take a minute or two to be completed




5. Add the [Level of Security](#) for the Group. For this example, the “Environment Admin” option is chosen. The system admin will receive an automatic notification when the level of security is successfully added. Refer to the following table to view all the levels of security

Level of Security	Details
Environment admin	User has full control of the group as well as access to the Environment Admin section
Full Control Allow	User has full control of the group
Write Delete Allow	User is allowed to write and delete on the group
Write Allow	User is allowed to write on the group
Read Allow	User is allowed to read on the group
Approval Allow	User is allowed to approve on the group
Full Control Deny	User is fully denied on the group
Write Delete Deny	User is denied to write and delete on the group
Write Deny	User is denied to write on the group
Read Deny	User is denied to read on the group

Approval Deny	User is denied to approve on the group
---------------	--



How to Remove a Group from an Environment

- 1. Navigate the cursor and select the  icon for the environment you want to remove groups from

ADMIN

GENERAL **ENVIRONMENT** USERS GROUPS SEARCH LANGUAGE RISK ATTRIBUTES ADVANCED MODELER

List of Environments + Add New Environment

Name ▲

Import Testing			
Manual Environment			
Manuel WebApp			
Map Graph Options Test			
maria_env			
maria_training			
Nadin			
New Env -1			
New Env 10			
Projet - GRRO			

« < 1 2 3 > »

Show: 10 - 25 - 50

2. Navigate the cursor and select the icon

Edit Groups of: Manual Environment

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

Select a Group

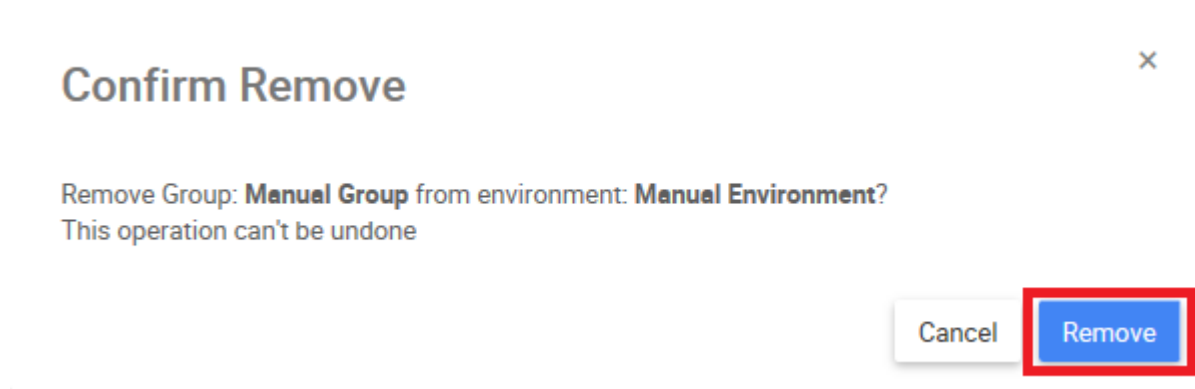
Name	Environment Admin	Full Control Allow	Write Delete Allow	Read Allow	Approval Allow	Full Control Deny	Write Delete Deny	Write Deny	Read Deny	Approval Deny
Manual Group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

« < 1 > »

Show: 10 - 25 - 50

Close

3. The following box will appear, select the “Remove” box to remove a group from an environment




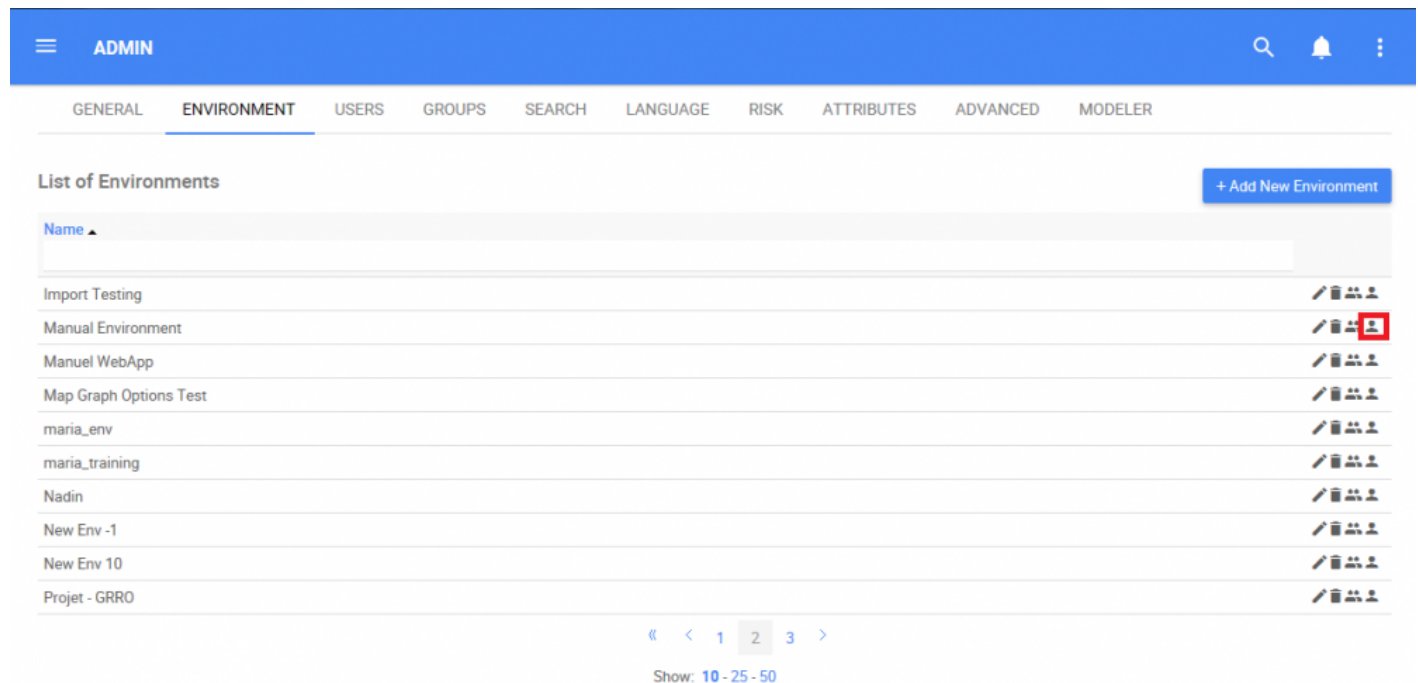
10.2.5 Add User to Environment

Under the Environment tab, System Admins can add [Users](#) to environments. Once the user is added, he will be able to see all the information available within an environment.































✿ All deny access' on an environment override any other permission awarded for a user

How to Add a User to an Environment

1. Navigate the cursor and select the  icon for the environment you want to add users to



The screenshot shows the 'ADMIN' interface with the 'ENVIRONMENT' tab selected. Below the navigation bar, there is a 'List of Environments' section. A table lists environments, and the 'Manual Environment' row is highlighted. The user management icon (a person icon) for 'Manual Environment' is highlighted with a red box. The table also includes a search bar and a '+ Add New Environment' button.

Name ▲	
Import Testing	  
Manual Environment	  
Manuel WebApp	  
Map Graph Options Test	  
maria_env	  
maria_training	  
Nadin	  
New Env -1	  
New Env 10	  
Projet - GRR0	  

2. Navigate to the “Select a User” search box
p(banner tip). The list of groups will populate below based on key word typing

Edit Users of: Manual Environment

To add a user to the environment, type the desired username, first or last name below and click on the desired user within the drop down.

Select a User

User Name	First Name	Last Name	Environment Admin	Full Control Allow	Write Delete Allow	Write Allow	Read Allow	Approval Allow	Full Control Deny	Write Delete Deny	Write Deny	Read Deny	Approval Deny

« < 1 > »

Show: 10 - 25 - 50

Close

3. Type the name of the User you want to add to the environment. "Double Click" on the user to finish adding it

Edit Users of: Manual Environment

To add a user to the environment, type the desired username, first or last name below and click on the desired user within the drop down.

Select a User

Matias Fontecilla (1matias)

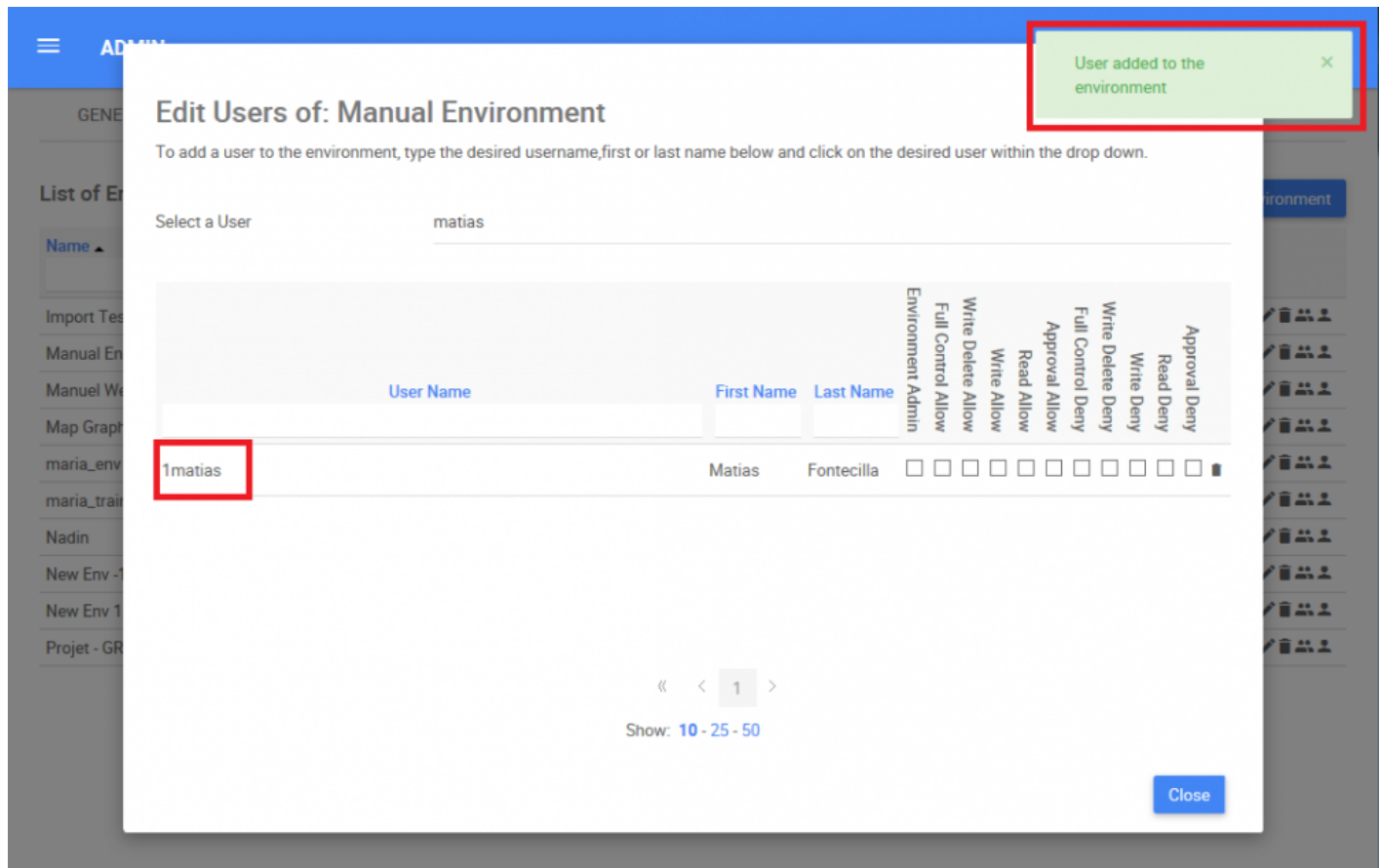
User Name	First Name	Last Name	Environment Admin	Full Control Allow	Write Delete Allow	Write Allow	Read Allow	Approval Allow	Full Control Deny	Write Delete Deny	Write Deny	Read Deny	Approval Deny
-----------	------------	-----------	-------------------	--------------------	--------------------	-------------	------------	----------------	-------------------	-------------------	------------	-----------	---------------

« < 1 > »

Show: 10 - 25 - 50

Close

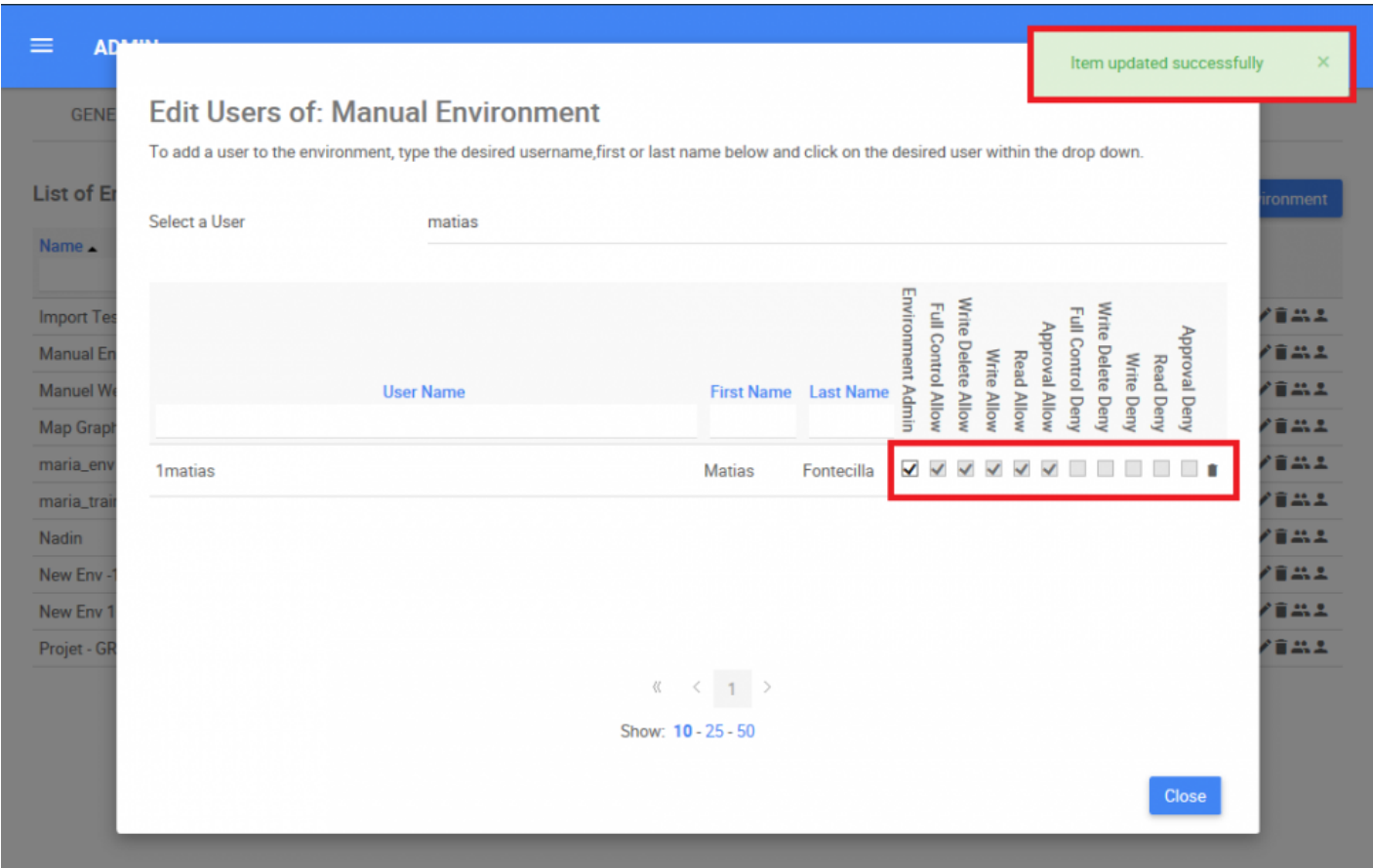
4. The added user will appear on the following table. The system admin will receive an automatic notification when the user is successfully added p(banner important). This process may take a minute or two to be completed




5. Add the [Level of Security](#) for the User. For this example, the “Environment Admin” option is chosen. The system admin will receive an automatic notification when the level of security is successfully added. Refer to the following table to view all the levels of security

Level of Security	Details
Environment admin	User has full control of the group as well as access to the Environment Admin section
Full Control Allow	User has full control of the environment
Write Delete Allow	User is allowed to write and delete on the environment
Write Allow	User is allowed to write on the environment
Read Allow	User is allowed to read on the environment
Approval Allow	User is allowed to approve on the environment
Full Control Deny	User is fully denied on the environment
Write Delete Deny	User is denied to write and delete on the environment
Write Deny	User is denied to write on the environment
Read Deny	User is denied to read on the environment

Approval Deny	User is denied to approve on the environment
---------------	--



How to Remove a User from an Environment































1. Navigate the cursor and select the  icon for the environment you want to remove users from

ADMIN

GENERAL ENVIRONMENT USERS GROUPS SEARCH LANGUAGE RISK ATTRIBUTES ADVANCED MODELER


List of Environments + Add New Environment

Name ▲

Import Testing	  
Manual Environment	  
Manuel WebApp	  
Map Graph Options Test	  
maria_env	  
maria_training	  
Nadin	  
New Env -1	  
New Env 10	  
Projet - GRRO	  

« < 1 2 3 >

Show: 10 - 25 - 50































2. Navigate the cursor and select the  icon

ADMIN

GENERAL ENVIRONMENT USERS GROUPS SEARCH LANGUAGE RISK ATTRIBUTES ADVANCED MODELER

List of Environments + Add New Environment

Name ▲

Import Testing	  
Manual Environment	  
Manuel WebApp	  
Map Graph Options Test	  
maria_env	  
maria_training	  
Nadin	  
New Env -1	  
New Env 10	  
Projet - GRRO	  

« < 1 2 3 >

Show: 10 - 25 - 50

Edit Users of: Manual Environment

To add a user to the environment, type the desired username, first or last name below and click on the desired user within the drop down.

Select a User

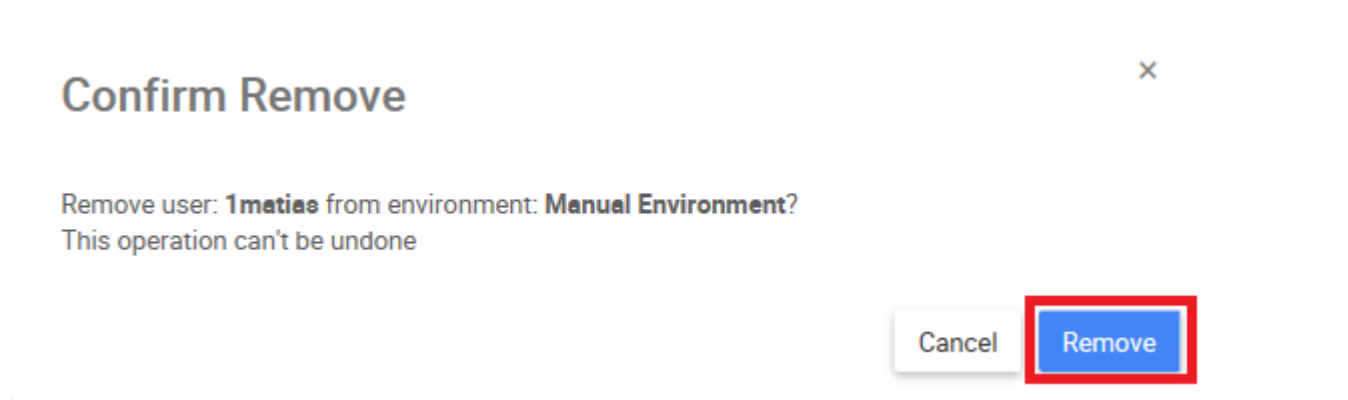
User Name	First Name	Last Name	Environment Admin	Full Control Allow	Write Delete Allow	Read Allow	Approval Allow	Full Control Deny	Write Delete Deny	Write Deny	Read Deny	Approval Deny
1matias	Matias	Fontecilla	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

« < 1 >

Show: 10 - 25 - 50

Close

3. The following box will appear, select the “Remove” box to remove an user from an environment



10.2.6 Set Environment Security

Different levels of security can be assigned to the [Users](#) and [Groups](#) added to an Environment.

Level of Security	Details
Environment admin	User has full control of the environment as well as access to the Environment Admin section
Full Control Allow	User has full control of the environment
Write Delete Allow	User is allowed to write and delete on the environment
Write Allow	User is allowed to write on the environment
Read Allow	User is allowed to read on the environment
Approval Allow	User is allowed to approve on the environment
Full Control Deny	User is fully denied on the environment
Write Delete Deny	User is denied to write and delete on the environment
Write Deny	User is denied to write on the environment
Read Deny	User is denied to read on the environment
Approval Deny	User is denied to approve on the environment

! All deny access' will always override any other permission awarded on a group or an object

* Security permissions for EPC objects are awarded on the Modeler. Click [here](#) to read further on how to edit security permissions on the Modeler

1. Environment Admin

Environment Admin	Full Control Allow	Write Delete Allow	Write Allow	Read Allow	Approval Allow	Full Control Deny	Write Delete Deny	Write Deny	Read Deny	Approval Deny
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. Full Control Allow

Approval Deny	<input type="checkbox"/>
Read Deny	<input type="checkbox"/>
Write Deny	<input type="checkbox"/>
Write Delete Deny	<input type="checkbox"/>
Full Control Deny	<input type="checkbox"/>
Approval Allow	<input checked="" type="checkbox"/>
Read Allow	<input checked="" type="checkbox"/>
Write Allow	<input checked="" type="checkbox"/>
Write Delete Allow	<input checked="" type="checkbox"/>
Full Control Allow	<input checked="" type="checkbox"/>
Environment Admin	<input type="checkbox"/>

3. Write Delete Allow

Approval Deny	<input type="checkbox"/>
Read Deny	<input type="checkbox"/>
Write Deny	<input type="checkbox"/>
Write Delete Deny	<input type="checkbox"/>
Full Control Deny	<input type="checkbox"/>
Approval Allow	<input type="checkbox"/>
Read Allow	<input checked="" type="checkbox"/>
Write Allow	<input checked="" type="checkbox"/>
Write Delete Allow	<input checked="" type="checkbox"/>
Full Control Allow	<input type="checkbox"/>
Environment Admin	<input type="checkbox"/>

4. Write Allow

Approval Deny	<input type="checkbox"/>
Read Deny	<input type="checkbox"/>
Write Deny	<input type="checkbox"/>
Write Delete Deny	<input type="checkbox"/>
Full Control Deny	<input type="checkbox"/>
Approval Allow	<input type="checkbox"/>
Read Allow	<input checked="" type="checkbox"/>
Write Allow	<input checked="" type="checkbox"/>
Write Delete Allow	<input type="checkbox"/>
Full Control Allow	<input type="checkbox"/>
Environment Admin	<input type="checkbox"/>

5. Read Allow

Approval Deny	<input type="checkbox"/>
Read Deny	<input type="checkbox"/>
Write Deny	<input type="checkbox"/>
Write Delete Deny	<input type="checkbox"/>
Full Control Deny	<input type="checkbox"/>
Approval Allow	<input type="checkbox"/>
Read Allow	<input checked="" type="checkbox"/>
Write Allow	<input type="checkbox"/>
Write Delete Allow	<input type="checkbox"/>
Full Control Allow	<input type="checkbox"/>
Environment Admin	<input type="checkbox"/>

6. Approval Allow

Approval Deny	<input type="checkbox"/>
Read Deny	<input type="checkbox"/>
Write Deny	<input type="checkbox"/>
Write Delete Deny	<input type="checkbox"/>
Full Control Deny	<input type="checkbox"/>
Approval Allow	<input checked="" type="checkbox"/>
Read Allow	<input checked="" type="checkbox"/>
Write Allow	<input type="checkbox"/>
Write Delete Allow	<input type="checkbox"/>
Full Control Allow	<input type="checkbox"/>
Environment Admin	<input type="checkbox"/>

7. Full Control Deny

Approval Deny	<input checked="" type="checkbox"/>
Read Deny	<input checked="" type="checkbox"/>
Write Deny	<input checked="" type="checkbox"/>
Write Delete Deny	<input checked="" type="checkbox"/>
Full Control Deny	<input checked="" type="checkbox"/>
Approval Allow	<input type="checkbox"/>
Read Allow	<input type="checkbox"/>
Write Allow	<input type="checkbox"/>
Write Delete Allow	<input type="checkbox"/>
Full Control Allow	<input type="checkbox"/>
Environment Admin	<input type="checkbox"/>

8. Write Delete Deny

Approval Deny	<input checked="" type="checkbox"/>
Read Deny	<input checked="" type="checkbox"/>
Write Deny	<input checked="" type="checkbox"/>
Write Delete Deny	<input checked="" type="checkbox"/>
Full Control Deny	<input type="checkbox"/>
Approval Allow	<input type="checkbox"/>
Read Allow	<input type="checkbox"/>
Write Allow	<input type="checkbox"/>
Write Delete Allow	<input type="checkbox"/>
Full Control Allow	<input type="checkbox"/>
Environment Admin	<input type="checkbox"/>

9. Write Deny

Approval Deny	<input type="checkbox"/>
Read Deny	<input type="checkbox"/>
Write Deny	<input checked="" type="checkbox"/>
Write Delete Deny	<input checked="" type="checkbox"/>
Full Control Deny	<input type="checkbox"/>
Approval Allow	<input type="checkbox"/>
Read Allow	<input type="checkbox"/>
Write Allow	<input type="checkbox"/>
Write Delete Allow	<input type="checkbox"/>
Full Control Allow	<input type="checkbox"/>
Environment Admin	<input type="checkbox"/>

10. Read Deny

Approval Deny	<input checked="" type="checkbox"/>
Read Deny	<input checked="" type="checkbox"/>
Write Deny	<input checked="" type="checkbox"/>
Write Delete Deny	<input checked="" type="checkbox"/>
Full Control Deny	<input checked="" type="checkbox"/>
Approval Allow	<input type="checkbox"/>
Read Allow	<input type="checkbox"/>
Write Allow	<input type="checkbox"/>
Write Delete Allow	<input type="checkbox"/>
Full Control Allow	<input type="checkbox"/>
Environment Admin	<input type="checkbox"/>

11. Approval Deny

Approval Deny	<input checked="" type="checkbox"/>
Read Deny	<input type="checkbox"/>
Write Deny	<input type="checkbox"/>
Write Delete Deny	<input type="checkbox"/>
Full Control Deny	<input type="checkbox"/>
Approval Allow	<input type="checkbox"/>
Read Allow	<input type="checkbox"/>
Write Allow	<input type="checkbox"/>
Write Delete Allow	<input type="checkbox"/>
Full Control Allow	<input type="checkbox"/>
Environment Admin	<input type="checkbox"/>

10.2.7 Sort Environment Table

In order to facilitate navigation, the WebApp allows System Admins to easily sort the Environment table. Admins can sort Environments on ascending or descending order by clicking on the “Name” box.

How to use “Sorting” Function

1. Navigate to the System Admin section
2. Navigate the Environment Tab
3. Click on the **Name**































1-Click will sort the Name in Ascending order, reflected by ▲

2-Clicks will sort the Name 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”.

The screenshot displays the 'ADMIN' interface of the EPC10 WebApp. The 'ENVIRONMENT' tab is selected in the top navigation bar. Below the navigation bar, there is a 'List of Environments' section with a '+ Add New Environment' button. The 'Name' column header is highlighted with a red box and a small upward-pointing triangle (▲), indicating that the table is sorted in ascending order. The table lists ten environments: 'Alex - Import Visio Cavok', 'Alex - Performance', 'Blake_Red_1', 'Blake_Red_2', 'Categories hell', 'Environment_Tim_Test', 'feng_test_env', 'GRC', 'IA', and 'IA - TEST'. Each row has a corresponding set of icons for editing, deleting, and adding users. At the bottom of the table, there is a pagination control showing '1' and '2' with arrows, and a 'Show: 10 - 25 - 50' dropdown.

Name ▲	
Alex - Import Visio Cavok	  
Alex - Performance	  
Blake_Red_1	  
Blake_Red_2	  
Categories hell	  
Environment_Tim_Test	  
feng_test_env	  
GRC	  
IA	  
IA - TEST	  

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

ADMIN

SEARCH

BELL































THREE DOTS

GENERALENVIRONMENTUSERSGROUPSSEARCHLANGUAGERISKATTRIBUTESADVANCEDMODELER

List of Environments

+ Add New Environment

Name

zFormation GRO XXXX-XX-XX - Participant S	  
zFormation GRO XXXX-XX-XX - Participant R	  
zFormation GRO XXXX-XX-XX - Participant Q	  
zFormation GRO XXXX-XX-XX - Participant P	  
zFormation GRO XXXX-XX-XX - Participant O	  
zFormation GRO XXXX-XX-XX - Participant N	  
zFormation GRO XXXX-XX-XX - Participant M	  
zFormation GRO XXXX-XX-XX - Participant L	  
zFormation GRO XXXX-XX-XX - Participant K	  
zFormation GRO XXXX-XX-XX - Participant F	  

« < 1 2 > »

Show: 10 - 25 - 50

10.2.8 Filter Environment Table

In order to facilitate navigation, the WebApp allows System Admins to easily filter the Environment table. Admins can filter the Environment table by typing the name of an existing environment name on the search box.

The screenshot displays the 'ADMIN' section of the EPC10 WebApp. The 'ENVIRONMENT' tab is selected in the top navigation bar. Below the navigation bar, the 'List of Environments' section is visible. A search box is highlighted with a red rectangle, containing the text 'Name'. Below the search box, a table lists various environments. Each row includes the environment name and a set of icons for editing, deleting, and adding users. The table is paginated, showing 10 environments per page. The current page is 1 of 2, and the total number of environments is 10 - 25 - 50.

Name	Actions
Alex - Import Visio Cavok	
Alex - Performance	
Blake_Red_1	
Blake_Red_2	
Categories hell	
Environment_Tim_Test	
feng_test_env	
GRC	
IA	
IA - TEST	

The Filtering section will cover the following:

1. [How to Add Filters](#)
2. [How to Remove Filters](#)

10.2.8.1 Add Filter

System Admins can add filters to see the items of its choice. **Type** what you are looking for to filter the list

How to Add Filter

1. Navigate cursor to the “Name” column to add a filter

The screenshot displays the 'ADMIN' interface with the 'ENVIRONMENT' tab selected. Below the navigation tabs, the 'List of Environments' section features a table. The 'Name' column header is highlighted with a red box. To the right of the table is a '+ Add New Environment' button. The table contains the following rows:

Name	
Ofeng_new_env	
Alex - Import Visio Cavok	
Alex - Performance	
Blake_Red_1	
Blake_Red_2	
Blake_Red_3	
Environment_Tim_Test	
feng_test_env	
GRC	
IA	

At the bottom of the interface, there are navigation controls showing '1' and '2' for page navigation, and 'Show: 10 - 25 - 50' for item range selection.

2. Type the word you are looking for to filter the list on the search box and click on “enter”

ADMIN

GENERAL **ENVIRONMENT** USERS GROUPS SEARCH LANGUAGE RISK ATTRIBUTES ADVANCED MODELER

List of Environments [+ Add New Environment](#)

Name

Ofeng_new_env	
Alex - Import Visio Cavok	
Alex - Performance	
Blake_Red_1	
Blake_Red_2	
Blake_Red_3	
Environment_Tim_Test	
feng_test_env	
GRC	
IA	

« < 1 2 > »

Show: 10 - 25 - 50

3. For this example, we will type “Alex.” The EPC will populate the results with the new filter

ADMIN

GENERAL **ENVIRONMENT** USERS GROUPS SEARCH LANGUAGE RISK ATTRIBUTES ADVANCED MODELER

List of Environments [+ Add New Environment](#)

Name


alex x

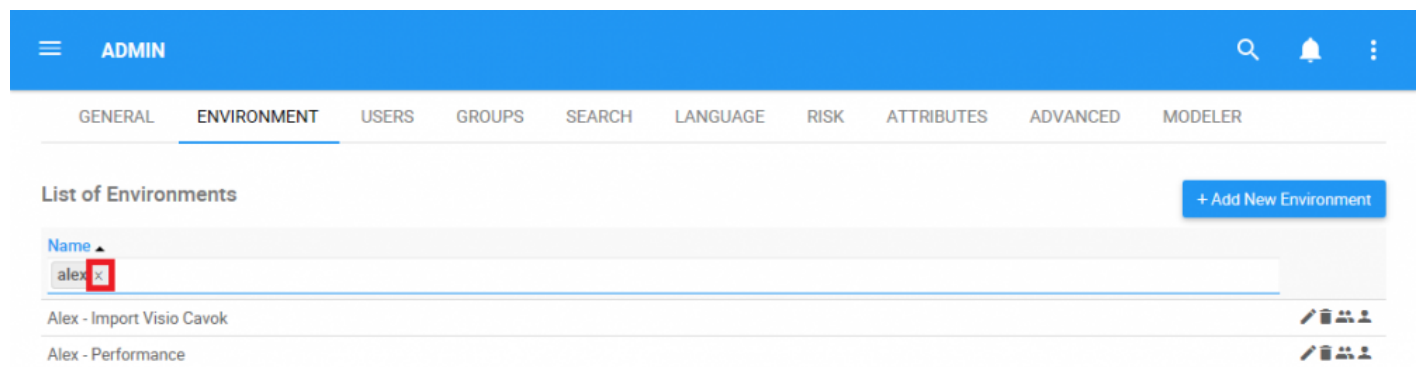
Alex - Import Visio Cavok	
Alex - Performance	

10.2.8.2 Remove Filter







System Administrators are able to **Remove Filters** on the Environment Table after adding a filter

How to Remove Filter

1. System Admin first needs to add a filter. Refer to [How to Add a Filter](#)
2. To remove the filter, click on the  button beside the filter name.



The screenshot displays the 'ADMIN' section of the EPC10 WebApp. The 'ENVIRONMENT' tab is selected, showing a 'List of Environments' table. A search filter 'alex' is applied to the 'Name' column, indicated by a red box around the filter input. The table lists two environments: 'Alex - Import Visio Cavok' and 'Alex - Performance'. Each row has icons for edit, delete, and user management. A '+ Add New Environment' button is visible in the top right corner of the table area.

Name	
Alex - Import Visio Cavok	  
Alex - Performance	  

10.3 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 User](#)
2. [Edit Existing User](#)
3. [Delete User](#)
4. [Add User to Group](#)
5. [Add User to Environment](#)
6. [Set User Security](#)
7. [Sort User Table](#)
8. [Filter User Table](#)
9. [Synchronize with Active Directory](#)

ADMIN

GENERAL
ENVIRONMENT
USERS
GROUPS
SEARCH
LANGUAGE
RISK
ATTRIBUTES
ADVANCED
MODELER































List of Users

9

1

Synchronize With Active Directory

+ Add New User

7 User Name ▲	First Name	Last Name	Email	
8				2 3 4 5
00000			vanes0@inter.com	  
000000			0000@0000	  
00000test				  
000ManualUser	Jack	Smith	jack@manual.com	  
001nadin	001	Review	nfarbman@interfacing.com	  
001test			nadin.farbman@gmail.com	  
002nadin	002	RESPONSIBLE	nfarbman1@interfacing.com	  
003nadin	003	ACCOUNTABLE	tes1t@interfacing.com	  
004nadin	004	CONSULTED	three@epc.com	  
005nadin	005	INFORMED	four@epc.com	  

« < 1 2 > »

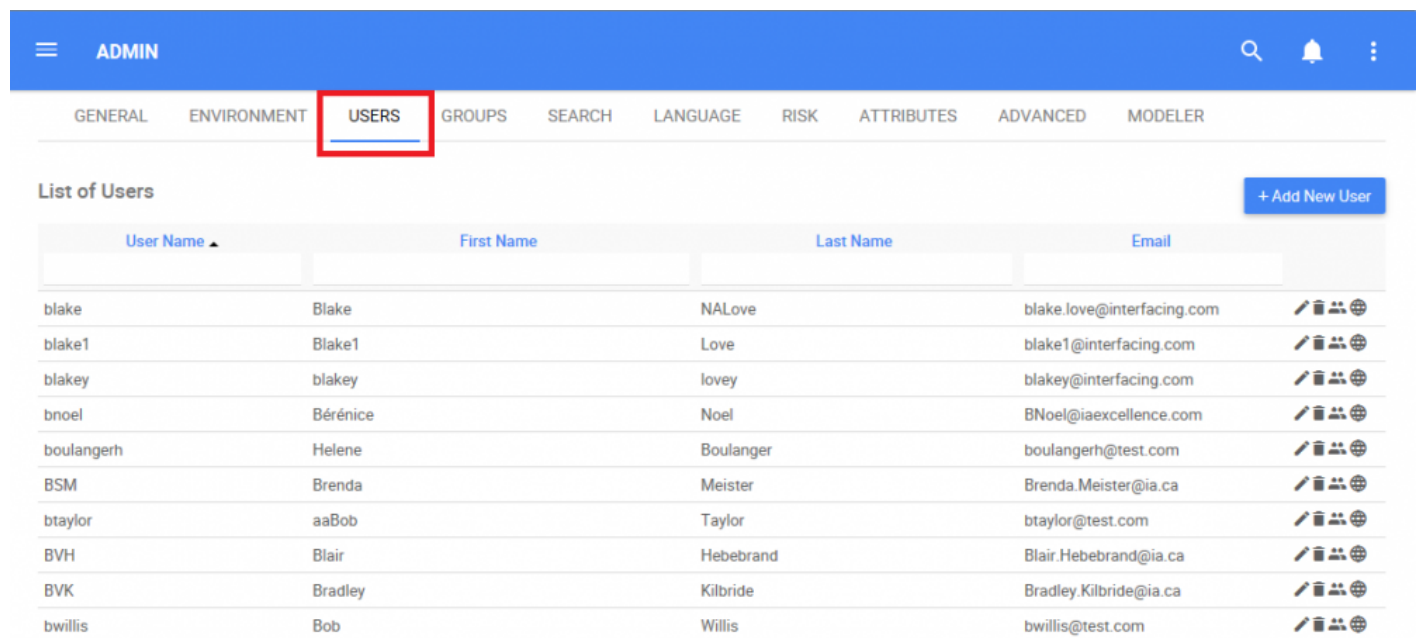
Show: 10 - 25 - 50

10.3.1 Add User

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.



User Name	First Name	Last Name	Email
blake	Blake	NALove	blake.love@interfacing.com
blake1	Blake1	Love	blake1@interfacing.com
blakey	blakey	lovey	blakey@interfacing.com
bnoel	Bérénice	Noel	BNoel@iaexcellence.com
boulangerh	Helene	Boulanger	boulangerh@test.com
BSM	Brenda	Meister	Brenda.Meister@ia.ca
btaylor	aaBob	Taylor	btaylor@test.com
BVH	Blair	Hebebrand	Blair.Hebebrand@ia.ca
BVK	Bradley	Kilbride	Bradley.Kilbride@ia.ca
bwillis	Bob	Willis	bwillis@test.com

4. To add a user, select the  button

ADMIN

SEARCH

BELL

DOT

GENERAL

ENVIRONMENT

USERS

GROUPS

SEARCH

LANGUAGE

RISK































ATTRIBUTES

ADVANCED

MODELER

List of Users

+ Add New User

User Name ▲	First Name	Last Name	Email	
blake	Blake	NALove	blake.love@interfacing.com	  
blake1	Blake1	Love	blake1@interfacing.com	  
blakey	blakey	lovey	blakey@interfacing.com	  
bnoel	Bérénice	Noel	BNoel@iaexcellence.com	  
boulangerh	Helene	Boulanger	boulangerh@test.com	  
BSM	Brenda	Meister	Brenda.Meister@ia.ca	  
btaylor	aaBob	Taylor	btaylor@test.com	  
BVH	Blair	Hebebrand	Blair.Hebebrand@ia.ca	  
BVK	Bradley	Kilbride	Bradley.Kilbride@ia.ca	  
bwillis	Bob	Willis	bwillis@test.com	  


5. This will create a pop-up window allowing System Admins to fill in the appropriate information. In this section, System Admins choose the [level of Authorization](#) for the user. For this example, we are creating an user called “Jack Smith”



Add New User

User Name *	000ManualUser
First Name	Jack
Middle Name	Middle Name
Last Name	Smith
Email *	jack@manual.com
Phone Number	Phone Number
Password *	•••
System Administrator	<input type="checkbox"/>
Access to EPC Modeler	<input type="checkbox"/>
Access to EPC Portal	<input checked="" type="checkbox"/>
System User	<input type="checkbox"/>

CancelAdd

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

10.3.2 Edit Existing User


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.

ADMIN				
GENERAL	ENVIRONMENT	USERS	GROUPS	SEARCH
LANGUAGE	RISK	ATTRIBUTES	ADVANCED	MODELER
List of Users + Add New User				
User Name ▲	First Name	Last Name	Email	
00000			vanes0@inter.com	  
00000test				  
000ManualUser	Jack	Smith	jack@manual.com	  
001nadin	001	Review	nfarbman@interfacing.com	  
002nadin	002	RESPONSIBLE	two@epc.com	  
003nadin	003	ACCOUNTABLE	eight@epc.com	  
004nadin	004	CONSULTED	three@epc.com	  
005nadin	005	INFORMED	four@epc.com	  
006nadin	006	VERIFIER	five@epc.com	  
007nadin	007	SUPPORT	ten@epc.com	  

Editing Window

1. For further editing capabilities, navigate the cursor and select the  icon featured on the right hand-side of each user.

ADMIN				
GENERAL ENVIRONMENT USERS GROUPS SEARCH LANGUAGE RISK ATTRIBUTES ADVANCED MODELER				
List of Users				+ Add New User
User Name ▲	First Name	Last Name	Email	
00000			vanes0@inter.com	  
00000test				  
000ManualUser	Jack	Smith	jack@manual.com	  
001nadin	001	Review	nfarbman@interfacing.com	  
002nadin	002	RESPONSIBLE	two@epc.com	  
003nadin	003	ACCOUNTABLE	eight@epc.com	  
004nadin	004	CONSULTED	three@epc.com	  
005nadin	005	INFORMED	four@epc.com	  
006nadin	006	VERIFIER	five@epc.com	  
007nadin	007	SUPPORT	ten@epc.com	  

✿ NOTE: If an organization is using any format of Single-Sign-On 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)

2. Selecting this item will re-open the full user editing page.

[Edit User](#)

User Name * 000ManualUser

First Name	Jack
------------	------

Middle Name Middle Name


Last Name Smith

Email * jack@manual.com

Phone Number Phone Number

Password * Password

System Administrator ☐Access to EPC Modeler ☐

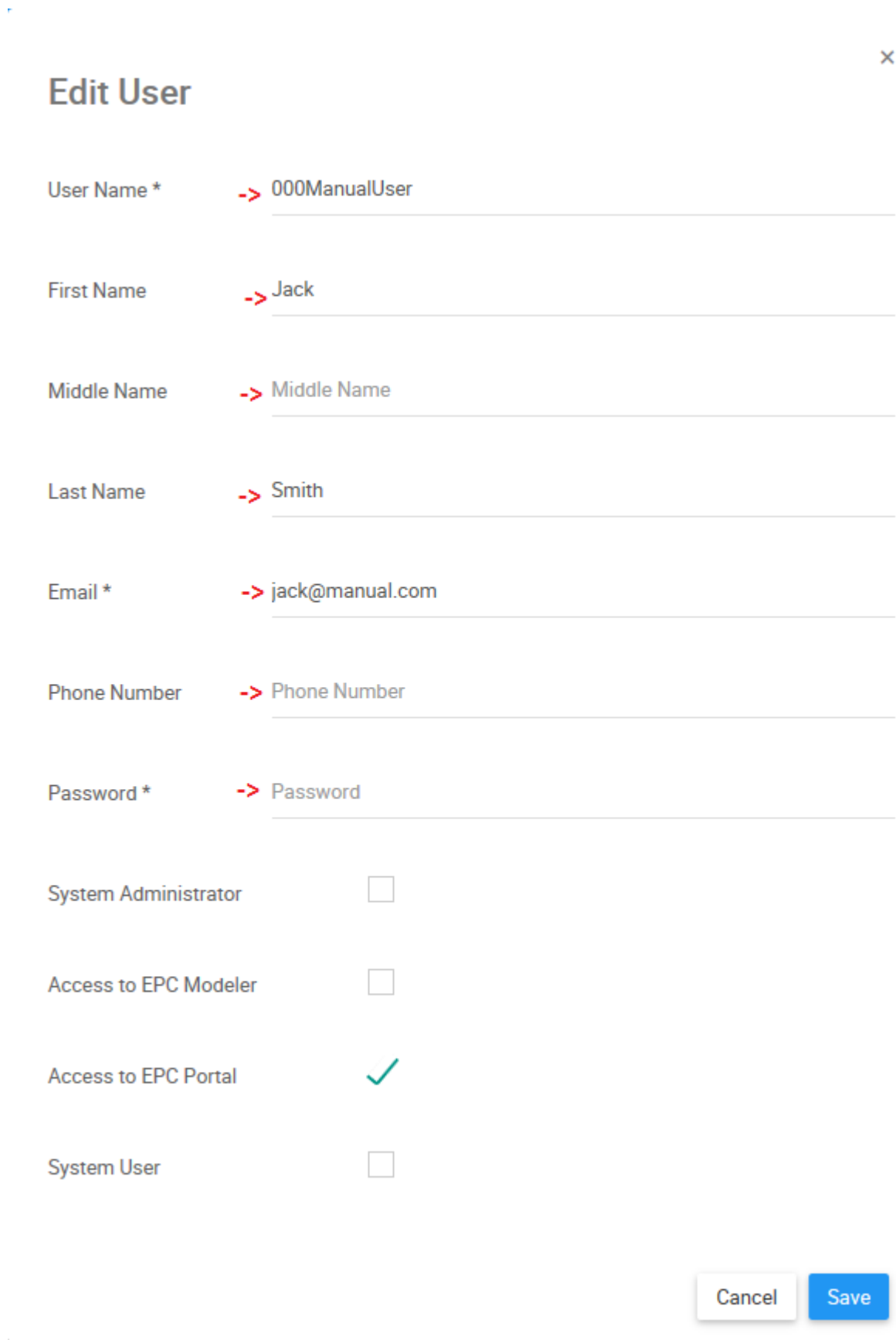
Access to EPC Portal 

System User ☐

Cancel

Save

3. Click on the box you want to edit. System Admin can edit the User Name, First Name, Middle Name, Last Name, Email, Phone Number and Password.



4. Check the icons ☐ ☒ for the level of access you desire to edit

Edit User



User Name * 000ManualUser

First Name Jack

Middle Name Middle Name

Last Name Smith

Email * jack@manual.com

Phone Number Phone Number

Password * Password

System Administrator ☐

Access to EPC Modeler ☐

Access to EPC Portal ☒

System User ☐

Cancel

Save

5. Select the “Save” button to confirm changes

Edit User

User Name *

000ManualUser

First Name

Jack

Middle Name

Middle Name

Last Name

Smith

Email *

jack@manual.com

Phone Number

Phone Number

Password *

Password

System Administrator

☐

Access to EPC Modeler

☐

Access to EPC Portal

☒

System User

☐

Cancel

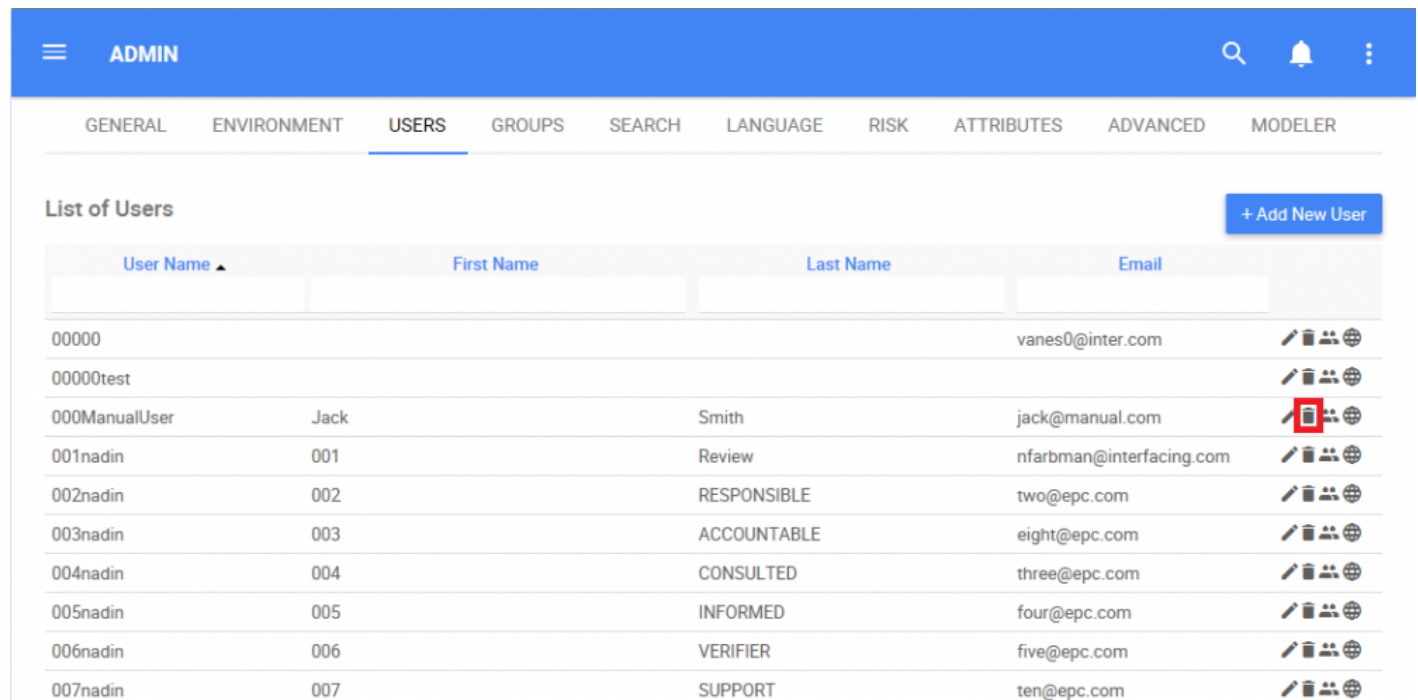
Save

10.3.3 Delete User











Under the Environment tab, System Admins can delete Users

How to Delete a User

1. Navigate the cursor and select the  icon for the User you want to delete



The screenshot shows the ADMIN interface with the 'USERS' tab selected. A table lists users with columns for User Name, First Name, Last Name, and Email. The user '000ManualUser' is highlighted, and the trash icon in the action column is circled in red.

User Name	First Name	Last Name	Email	Action
00000			vanes0@inter.com	
00000test				
000ManualUser	Jack	Smith	jack@manual.com	
001nadin	001	Review	nfarbman@interfacing.com	
002nadin	002	RESPONSIBLE	two@epc.com	
003nadin	003	ACCOUNTABLE	eight@epc.com	
004nadin	004	CONSULTED	three@epc.com	
005nadin	005	INFORMED	four@epc.com	
006nadin	006	VERIFIER	five@epc.com	
007nadin	007	SUPPORT	ten@epc.com	

2. The following box will appear and you will be able to delete the User by clicking on the “Delete” box



The screenshot shows a 'Confirm Delete' dialog box. The text inside the dialog reads 'Delete user 000ManualUser?'. There are two buttons: 'Cancel' and 'Delete'. The 'Delete' button is circled in red.

10.3.4 Add User to Group

Under the Users tab, System Admins can add [Groups](#) to Users. 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.

- ✿ Every user created by the System Admin will automatically be part of the “Authenticated Users” group and the “Everyone” group. The security settings for these Groups are set by the System Admin under the Groups tab

How to Add a Group to a User

1. Navigate the cursor and select the icon for the User you want to add a group to

ADMIN

GENERAL

ENVIRONMENT

USERS

GROUPS

SEARCH

LANGUAGE

RISK









































ATTRIBUTES

ADVANCED

MODELER

List of Users

+ Add New User

User Name ▲	First Name	Last Name	Email	
00000			vanes0@inter.com	   
00000test				   
000ManualUser	Jack	Smith	jack@manual.com	   
001nadin	001	Review	nfarbman@interfacing.com	   
002nadin	002	RESPONSIBLE	two@epc.com	   
003nadin	003	ACCOUNTABLE	eight@epc.com	   
004nadin	004	CONSULTED	three@epc.com	   
005nadin	005	INFORMED	four@epc.com	   
006nadin	006	VERIFIER	five@epc.com	   
007nadin	007	SUPPORT	ten@epc.com	   

2. Navigate to the “Select a Group” search box
p(banner tip). The list of groups will populate below based on key word typing

ADMIN

GENERAL ENVIRON MODELER

List of Users

User Name ▲

00000
00000test
000ManualUser
001nadin
002nadin
003nadin
004nadin
005nadin
006nadin
007nadin

Edit Groups of: 000ManualUser

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

Select a Group

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

« < 1 >

Show: 10 - 25 - 50

Close

3. Type the name of the Group you want to add to the User. “Double Click” on the group to finish adding it

ADMIN

GENERAL ENVIRON

MODELER

List of Users

User Name ▲

00000
00000test
000ManualUser
001nadin
002nadin
003nadin
004nadin
005nadin
006nadin
007nadin

Edit Groups of: 000ManualUser

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

Select a Group manual

Manual Group

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

« < 1 > »

Show: 10 - 25 - 50

Close

ADVANCED

+ Add New User

mail

com

com

terfacing.com

m

m

n

n

4. The added group will appear on the following table. The system admin will receive an automatic notification when the group is successfully added p(banner important). This process may take a minute or two to be completed

ADMIN

GENERAL

ENVIRONMENT

MODELER

List of Users

User Name ▴

00000

00000test

000ManualUser

001nadin

002nadin

003nadin

004nadin

005nadin

006nadin

007nadin

ADVANCED

+ Add New User

mail

com

com

terfacing.com

m

m

n

User added to the group

×

Edit Groups of: 000ManualUser

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

Select a Group

Name ▴

Admin

Modeler Access

Portal Access

Authenticated Users

☐

☐

☐

Everyone

☐

☒

☐

Manual Group

☐

☐

☒

«

<

1

>

»

Show: 10 - 25 - 50

Close

- ✿ User groups have three levels of security, Users under a group can either be Admins, have Modeler Access, and/or Portal Access. The security settings for these Groups are set by the System Admin under the [Groups](#) tab

How to Remove a Group from a User

1. Navigate the cursor and select the icon for the User you want to remove groups from

ADMIN

SEARCH









































BELL


THREE DOTS

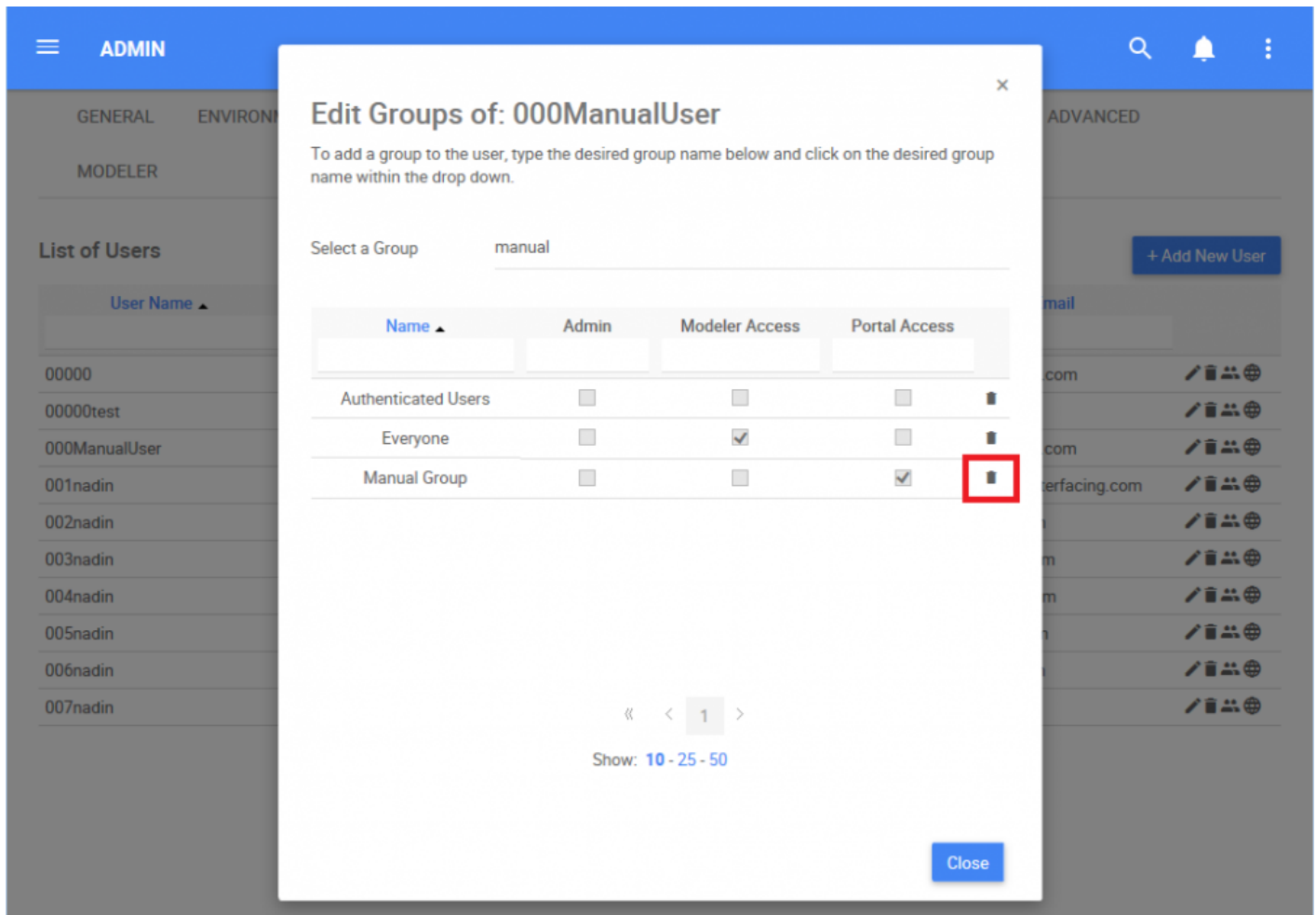
GENERALENVIRONMENTUSERSGROUPSSEARCHLANGUAGERISKATTRIBUTESADVANCEDMODELER

List of Users

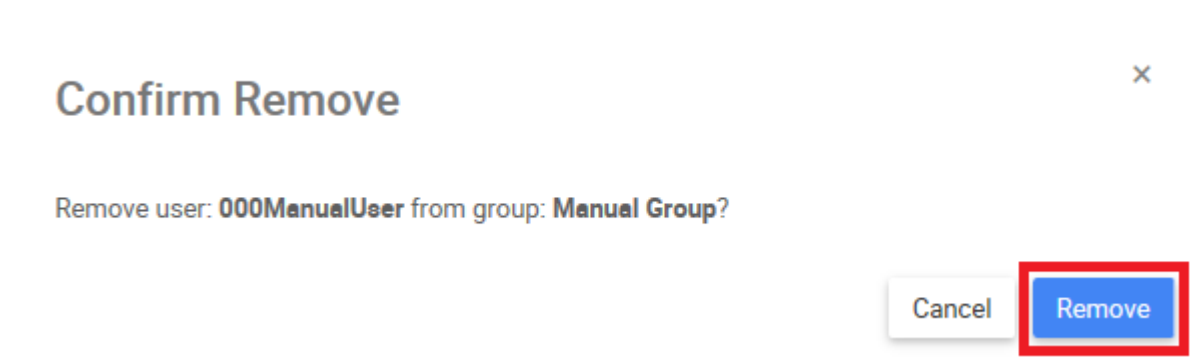
+ Add New User

User Name	First Name	Last Name	Email	
00000			vanes0@inter.com	   
00000test				   
000ManualUser	Jack	Smith	jack@manual.com	   
001nadin	001	Review	nfarbman@interfacing.com	   
002nadin	002	RESPONSIBLE	two@epc.com	   
003nadin	003	ACCOUNTABLE	eight@epc.com	   
004nadin	004	CONSULTED	three@epc.com	   
005nadin	005	INFORMED	four@epc.com	   
006nadin	006	VERIFIER	five@epc.com	   
007nadin	007	SUPPORT	ten@epc.com	   

2. Navigate the cursor and select the  icon




3. The following box will appear, select the “Remove” box to remove a group from a User



10.3.5 Add User to Environment

Under the User tab, System Admins can add an [Environment](#) to Users. By adding a User to an Environment, the user will have access to EPC. Users can be assigned to one or multiple environments depending on the user needs. System Admins can view these environments within the Environment tab, or can view which Environment users are part of directly within the Users tab.

How to Add an Environment to a User































1. Navigate the cursor and select the  icon for the User you want to add an environment to

ADMIN

GENERAL
ENVIRONMENT
USERS
GROUPS
SEARCH
LANGUAGE
RISK
ATTRIBUTES
ADVANCED
MODELER

List of Users

+ Add New User

User Name	First Name	Last Name	Email	
00000			vanes0@inter.com	  
00000test				  
000ManualUser	Jack	Smith	jack@manual.com	  
001nadin	001	Review	nfarbman@interfacing.com	  
002nadin	002	RESPONSIBLE	two@epc.com	  
003nadin	003	ACCOUNTABLE	eight@epc.com	  
004nadin	004	CONSULTED	three@epc.com	  
005nadin	005	INFORMED	four@epc.com	  
006nadin	006	VERIFIER	five@epc.com	  
007nadin	007	SUPPORT	ten@epc.com	  

2. Navigate to the “Select an Environment” search box



The list of environments will populate below based on key word typing

ADMIN

Edit Environment's of: 000ManualUser

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

Select an Environment

Environment	Environment Admin	Full Control Allow	Write Delete Allow	Write Allow	Read Allow	Approval Allow	Full Control Deny	Write Delete Deny	Write Deny	Read Deny	Approval Deny

« < 1 > »

Show: 10 - 25 - 50

Close

3. Type the name of the Environment you want to add to the User. "Double Click" on the environment to finish adding it

ADMIN

GENERAL EN
ADVANCED

List of Users

User Name ▲

User Name	Environment Admin	Full Control Allow	Write Delete Allow	Write Allow	Read Allow	Approval Allow	Full Control Deny	Write Delete Deny	Write Deny	Read Deny	Approval Deny
00000											
00000test											
000ManualUser											
001nadin											
002nadin											
003nadin											
004nadin											
005nadin											
006nadin											
007nadin											

Edit Environment's of: 000ManualUser

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

Select an Environment manual

Manual Environment

Environment

« < 1 > »

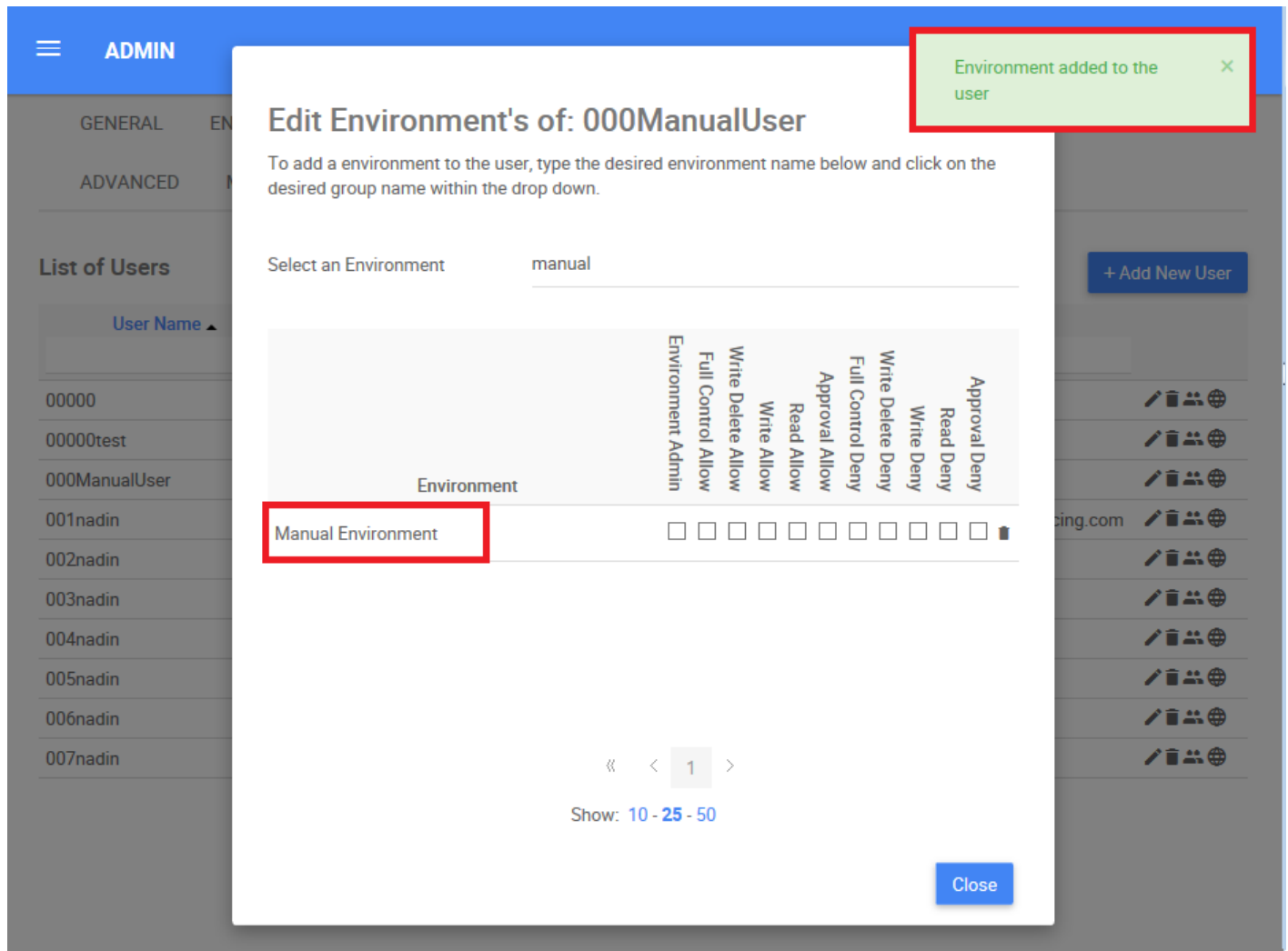
Show: 10 - 25 - 50

Close

4. The added Environment will appear on the following table. The system admin will receive an automatic notification when the Environment is successfully added



This process may take a minute or two to be completed



5. Add the [Level of Security](#) for the User. For this example, the “Environment Admin” option is chosen. The system admin will receive an automatic notification when the level of security is successfully added. Refer to the following table to view all the levels of security

Level of Security	Details
Environment admin	User has full control of the environment as well as access to the Environment Admin section
Full Control Allow	User has full control of the environment
Write Delete Allow	User is allowed to write and delete on the environment
Write Allow	User is allowed to write on the environment
Read Allow	User is allowed to read on the environment
Approval Allow	User is allowed to approve on the environment

Full Control Deny	User is fully denied on the environment
Write Delete Deny	User is denied to write and delete on the environment
Write Deny	User is denied to write on the environment
Read Deny	User is denied to read on the environment
Approval Deny	User is denied to approve on the environment

ADMIN

Edit Environment's of: 000ManualUser

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

Select an Environment

Environment	Environment Admin	Full Control Allow	Write Delete Allow	Write Allow	Read Allow	Approval Allow	Full Control Deny	Write Delete Deny	Write Deny	Read Deny	Approval Deny
Manual Environment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>


« < 1 > »

Show: 10 - 25 - 50

Close

Item updated successfully

How to Remove an Environment from a User









































1. Navigate the cursor and select the  icon for the User you want to remove an Environment from


ADMIN

GENERALENVIRONMENTUSERSGROUPSSEARCHLANGUAGERISKATTRIBUTESADVANCEDMODELER

List of Users

+ Add New User

User Name ▲	First Name	Last Name	Email	
00000			vanes0@inter.com	   
00000test				   
000ManualUser	Jack	Smith	jack@manual.com	   
001nadin	001	Review	nfarbman@interfacing.com	   
002nadin	002	RESPONSIBLE	two@epc.com	   
003nadin	003	ACCOUNTABLE	eight@epc.com	   
004nadin	004	CONSULTED	three@epc.com	   
005nadin	005	INFORMED	four@epc.com	   
006nadin	006	VERIFIER	five@epc.com	   
007nadin	007	SUPPORT	ten@epc.com	   

2. Navigate the cursor and select the  icon

Edit Environment's of: 000ManualUser

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

Select an Environment

Environment	Environment Admin	Full Control Allow	Write Delete Allow	Write Allow	Read Allow	Approval Allow	Full Control Deny	Write Delete Deny	Write Deny	Read Deny	Approval Deny
Manual Environment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

« < 1 > »

Show: 10 - 25 - 50

Close

3. The following box will appear, select the “Remove” box to remove an environment from a User

Confirm Remove

Remove Environment: **Manual Environment** from group: **000ManualUser**?

Cancel Remove

10.3.6 Set User Security

Different levels of security can be assigned to [Users](#) when added to an Environment.

Level of Security	Details
Environment admin	User has full control of the environment as well as access to the Environment Admin section
Full Control Allow	User has full control of the environment
Write Delete Allow	User is allowed to write and delete on the environment
Write Allow	User is allowed to write on the environment
Read Allow	User is allowed to read on the environment
Approval Allow	User is allowed to approve on the environment
Full Control Deny	User is fully denied on the environment
Write Delete Deny	User is denied to write and delete on the environment
Write Deny	User is denied to write on the environment
Read Deny	User is denied to read on the environment
Approval Deny	User is denied to approve on the environment



All deny access' will always override any other permission awarded on an environment, a group or an object for a user

1. Environment Admin

Environment Admin	Full Control Allow	Write Delete Allow	Write Allow	Read Allow	Approval Allow	Full Control Deny	Write Delete Deny	Write Deny	Read Deny	Approval Deny
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. Full Control Allow

Approval Deny	<input type="checkbox"/>
Read Deny	<input type="checkbox"/>
Write Deny	<input type="checkbox"/>
Write Delete Deny	<input type="checkbox"/>
Full Control Deny	<input type="checkbox"/>
Approval Allow	<input checked="" type="checkbox"/>
Read Allow	<input checked="" type="checkbox"/>
Write Allow	<input checked="" type="checkbox"/>
Write Delete Allow	<input checked="" type="checkbox"/>
Full Control Allow	<input checked="" type="checkbox"/>
Environment Admin	<input type="checkbox"/>

3. Write Delete Allow

Approval Deny	<input type="checkbox"/>
Read Deny	<input type="checkbox"/>
Write Deny	<input type="checkbox"/>
Write Delete Deny	<input type="checkbox"/>
Full Control Deny	<input type="checkbox"/>
Approval Allow	<input type="checkbox"/>
Read Allow	<input checked="" type="checkbox"/>
Write Allow	<input checked="" type="checkbox"/>
Write Delete Allow	<input checked="" type="checkbox"/>
Full Control Allow	<input type="checkbox"/>
Environment Admin	<input type="checkbox"/>

4. Write Allow

Approval Deny	<input type="checkbox"/>
Read Deny	<input type="checkbox"/>
Write Deny	<input type="checkbox"/>
Write Delete Deny	<input type="checkbox"/>
Full Control Deny	<input type="checkbox"/>
Approval Allow	<input type="checkbox"/>
Read Allow	<input checked="" type="checkbox"/>
Write Allow	<input checked="" type="checkbox"/>
Write Delete Allow	<input type="checkbox"/>
Full Control Allow	<input type="checkbox"/>
Environment Admin	<input type="checkbox"/>

5. Read Allow

Approval Deny	<input type="checkbox"/>
Read Deny	<input type="checkbox"/>
Write Deny	<input type="checkbox"/>
Write Delete Deny	<input type="checkbox"/>
Full Control Deny	<input type="checkbox"/>
Approval Allow	<input type="checkbox"/>
Read Allow	<input checked="" type="checkbox"/>
Write Allow	<input type="checkbox"/>
Write Delete Allow	<input type="checkbox"/>
Full Control Allow	<input type="checkbox"/>
Environment Admin	<input type="checkbox"/>

6. Approval Allow

Approval Deny	<input type="checkbox"/>
Read Deny	<input type="checkbox"/>
Write Deny	<input type="checkbox"/>
Write Delete Deny	<input type="checkbox"/>
Full Control Deny	<input type="checkbox"/>
Approval Allow	<input checked="" type="checkbox"/>
Read Allow	<input checked="" type="checkbox"/>
Write Allow	<input type="checkbox"/>
Write Delete Allow	<input type="checkbox"/>
Full Control Allow	<input type="checkbox"/>
Environment Admin	<input type="checkbox"/>

7. Full Control Deny

Approval Deny	<input checked="" type="checkbox"/>
Read Deny	<input checked="" type="checkbox"/>
Write Deny	<input checked="" type="checkbox"/>
Write Delete Deny	<input checked="" type="checkbox"/>
Full Control Deny	<input checked="" type="checkbox"/>
Approval Allow	<input type="checkbox"/>
Read Allow	<input type="checkbox"/>
Write Allow	<input type="checkbox"/>
Write Delete Allow	<input type="checkbox"/>
Full Control Allow	<input type="checkbox"/>
Environment Admin	<input type="checkbox"/>

8. Write Delete Deny

Approval Deny	<input checked="" type="checkbox"/>
Read Deny	<input checked="" type="checkbox"/>
Write Deny	<input checked="" type="checkbox"/>
Write Delete Deny	<input checked="" type="checkbox"/>
Full Control Deny	<input type="checkbox"/>
Approval Allow	<input type="checkbox"/>
Read Allow	<input type="checkbox"/>
Write Allow	<input type="checkbox"/>
Write Delete Allow	<input type="checkbox"/>
Full Control Allow	<input type="checkbox"/>
Environment Admin	<input type="checkbox"/>

9. Write Deny

Approval Deny	<input type="checkbox"/>
Read Deny	<input type="checkbox"/>
Write Deny	<input checked="" type="checkbox"/>
Write Delete Deny	<input checked="" type="checkbox"/>
Full Control Deny	<input type="checkbox"/>
Approval Allow	<input type="checkbox"/>
Read Allow	<input type="checkbox"/>
Write Allow	<input type="checkbox"/>
Write Delete Allow	<input type="checkbox"/>
Full Control Allow	<input type="checkbox"/>
Environment Admin	<input type="checkbox"/>

10. Read Deny

Approval Deny	<input checked="" type="checkbox"/>
Read Deny	<input checked="" type="checkbox"/>
Write Deny	<input checked="" type="checkbox"/>
Write Delete Deny	<input checked="" type="checkbox"/>
Full Control Deny	<input checked="" type="checkbox"/>
Approval Allow	<input type="checkbox"/>
Read Allow	<input type="checkbox"/>
Write Allow	<input type="checkbox"/>
Write Delete Allow	<input type="checkbox"/>
Full Control Allow	<input type="checkbox"/>
Environment Admin	<input type="checkbox"/>

11. Approval Deny

Approval Deny	<input checked="" type="checkbox"/>
Read Deny	<input type="checkbox"/>
Write Deny	<input type="checkbox"/>
Write Delete Deny	<input type="checkbox"/>
Full Control Deny	<input type="checkbox"/>
Approval Allow	<input type="checkbox"/>
Read Allow	<input type="checkbox"/>
Write Allow	<input type="checkbox"/>
Write Delete Allow	<input type="checkbox"/>
Full Control Allow	<input type="checkbox"/>
Environment Admin	<input type="checkbox"/>

10.3.7 Sort User Table

In order to facilitate navigation, the WebApp allows System Admins to easily search for Users.

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

Filter	Details
User Name	Allows users to sort the table by the User Name
First Name	Allows users to sort the table by the user's First Name
Last Name	Allows users to sort the table by the user's Last Name
Email	Allows users to sort the table by the user's email

Admins can sort Users on ascending or descending order by clicking on User Name, First Name, Last Name or Email. For the following example, the table was sorted by User Name

How to use “Sorting” Function

1. Navigate to the System Admin section
2. Navigate the User Tab
3. Click on the **User Name**

1-Click will sort the User Name in Ascending order, reflected by ▲

2-Clicks will sort the User Name 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”.

ADMIN				
GENERAL	ENVIRONMENT	USERS	GROUPS	SEARCH
List of Users				
User Name	First Name	Last Name	Email	
00000			vanes0@inter.com	
00000test				
000ManualUser	Jack	Smith	jack@manual.com	
001nadin	001	Review	nfarbman@interfacing.com	
002nadin	002	RESPONSIBLE	two@epc.com	
003nadin	003	ACCOUNTABLE	eight@epc.com	
004nadin	004	CONSULTED	three@epc.com	
005nadin	005	INFORMED	four@epc.com	
006nadin	006	VERIFIER	five@epc.com	
007nadin	007	SUPPORT	ten@epc.com	

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

ADMIN				
GENERAL	ENVIRONMENT	USERS	GROUPS	SEARCH
List of Users				
User Name	First Name	Last Name	Email	
zaheerabbas	Zaheer	Abbas	alex.ebie@interfacing.com	
z9010l	Pierre	Jones	Pierre.Jones@ia.ca	
YZF	Yalda	Forooghi	Yalda.Forooghi@ia.ca	
ylangevi	Yolande	Langevin	YLangevin@iaexcellence.com	
ydesrosi	Yannick	Desrosiers	YDesrosiers@iaexcellence.com	
YBC	Yves	Charette	Yves.Charette@ia.ca	
x3x3x3	1x	1x	vanessa.medeiros3@heybubble.com	
x2x2x2	1X	1X	vanessa.medeiros2@heybubble.com	
x1x1x1	1x	1x	vanessa.medeiros@heybubble.com	
WZK	Wayne	Katzuk	Wayne.Katzuk@ia.ca	

« < 1 2 >

Show: 10 - 25 - 50

10.3.8 Filter User Table

Admins can also search for a User by typing on the search box, either User Name, First Name, Last name, Email.

Column	Options
User Name	Textual search for any existing User Name
First Name	Textual search for any existing user's First Name
Last Name	Textual search for any existing user's Last Name
Email	Textual search for any existing user's Email

The Filtering section will cover the following:

1. [How to Add Filters](#)
2. [How to Remove Filters](#)
3. [How to Combine Filters](#)

10.3.8.1 Add Filter































System Admins can add filters to see the items of its choice. **Type** what you are looking for to filter the list

How to Add Filter

1. Navigate cursor and select the box column you wish to filter. For this example, we will use “First Name”

List of Users

Synchronize With Active Directory + Add New User

User Name	First Name	Last Name ▲	Email	
user17	User 17		seventeen@epc.com	  
user11	User 11		eleven@epc.com	  
epcadmin	Administrator			  
stephane2	stephane2		stephane@interfacing.com	  
EpcSystem				  
simi	simi			  
english	English		thirty@epc.com	  
ApprovalSystem				  
user12	User 12		twelve@epc.com	  
user13	User 13		thirteen@epc.com	  































« < 1 2 >

Show: 10 - 25 - 50

2. Type the word you are looking for to filter the list on the search box and click on “enter”

List of Users



















Synchronize With Active Directory + Add New User

User Name	First Name	Last Name ▲	Email	
user17	User 17		seventeen@epc.com	  
user11	User 11		eleven@epc.com	  
epcadmin	Administrator			  
stephane2	stephane2		stephane@interfacing.com	  
EpcSystem				  
simi	simi			  
english	English		thirty@epc.com	  
ApprovalSystem				  
user12	User 12		twelve@epc.com	  
user13	User 13		thirteen@epc.com	  

« < 1 2 >

Show: 10 - 25 - 50


3. For this example, we will type “ya.” The EPC will populate the results with the new filter

List of Users				Synchronize With Active Directory	+ Add New User
User Name	First Name	Last Name ▲	Email		
	ya x				
Imdrvf	Yassine	Abrougui	Yassine.Abrougui@ia.ca		
Imdrvvy	Yassine	Alahyane	Yassine.Alahyane@ia.ca		
Imphtf	Yalda	Arzani			
Ikirgz	Lyane	Charron	Lyane.Charron@ia.ca		
Incsdl	Tanya	De Medeiros	Tanya.DeMedeiros@ia.ca		
ydesrosi	Yannick	Desrosiers	YDesrosiers@iaexcellence.com		
YZF	Yalda	Forooghi	Yalda.Forooghi@ia.ca		
Inirst	Yanela	Guzman			
Incsdq	Dallya	Ho	Dallya.Ho@ia.ca		
Imphbc	Mariya	Kasyanov			
				« < 1 2 > »	
				Show: 10 - 25 - 50	

10.3.8.2 Remove Filter









System Administrators are able to **Remove Filters** on the Users Table after adding a filter

How to Remove Filter

1. System Admin first needs to add a filter. Refer to [How to Add a Filter](#)
2. To remove the filter, click on the  button beside the filter name.

List of Users

[Synchronize With Active Directory](#)
[+ Add New User](#)

User Name	First Name	Last Name ▲	Email	
	Yassine			
Imdrvf	Yassine	Abrougui	Yassine.Abrougui@ia.ca	  
Imdrv	Yassine	Alahyane	Yassine.Alahyane@ia.ca	  
Imphtf	Yalda	Arzani		  
Ikirgz	Lyane	Charron	Lyane.Charron@ia.ca	  
Incsdl	Tanya	De Medeiros	Tanya.DeMedeiros@ia.ca	  
ydesrosi	Yannick	Desrosiers	YDesrosiers@iaexcellence.com	  
YZF	Yalda	Forooghi	Yalda.Forooghi@ia.ca	  
Inirst	Yanela	Guzman		  
Incsdq	Daliya	Ho	Daliya.Ho@ia.ca	  
Imphbc	Mariya	Kasyanov		  

« < 1 2 > »

Show: 10 - 25 - 50

10.3.8.3 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](#)

10.3.9 Synchronize with Active Directory

Active Directory is a service offered by Microsoft. If the company uses this software, it can be implemented in the EPC. System Admins can automatically synchronize the company's Active Directory with the EPC users directory. This will enable System Admin to save time and to automatically have all the organization's employees in the EPC Directory.

! This is **only** available if the organization uses Microsoft's Active Directory and they have the license to use it on EPC



The **Synchronize With Active Directory** icon will only be visible if the organization requested the Active Directory licence































To Synchronize with Active Directory, follow the next steps

1. Navigate to the System Admin section
2. Select the Users tab within the System Admin Section

ADMIN

GENERAL ENVIRONMENT **USERS** GROUPS SEARCH LANGUAGE RISK ATTRIBUTES ADVANCED MODELER

List of Users [Synchronize With Active Directory](#) [+ Add New User](#)

User Name ▲	First Name	Last Name	Email	
00000			vanes0@inter.com	  
000000			0000@0000	  
00000test				  
000ManualUser	Jack	Smith	jack@manual.com	  
001nadin	001	Review	nfarbman@interfacing.com	  
001test			nadin.farbman@gmail.com	  
002nadin	002	RESPONSIBLE	nfarbman1@interfacing.com	  
003nadin	003	ACCOUNTABLE	tes1t@interfacing.com	  
004nadin	004	CONSULTED	three@epc.com	  
005nadin	005	INFORMED	four@epc.com	  

« < 1 2 >































Show: 10 - 25 - 50

3. Click on the [Synchronize With Active Directory](#) icon to Synchronize with Active Directory

ADMIN

GENERAL ENVIRONMENT **USERS** GROUPS SEARCH LANGUAGE RISK ATTRIBUTES ADVANCED MODELER

List of Users [Synchronize With Active Directory](#) [+ Add New User](#)

User Name ▲	First Name	Last Name	Email	
00000			vanes0@inter.com	  
000000			0000@0000	  
00000test				  
000ManualUser	Jack	Smith	jack@manual.com	  
001nadin	001	Review	nfarbman@interfacing.com	  
001test			nadin.farbman@gmail.com	  
002nadin	002	RESPONSIBLE	nfarbman1@interfacing.com	  
003nadin	003	ACCOUNTABLE	tes1t@interfacing.com	  
004nadin	004	CONSULTED	three@epc.com	  
005nadin	005	INFORMED	four@epc.com	  

« < 1 2 >

Show: 10 - 25 - 50

4. System Admin will first receive a red notification saying the synchronization is in process































ADMIN

Synchronizing Active Directory, please wait.

GENERALENVIRONMENTUSERSGROUPSSEARCHLANGUAGERISKATTRIBUTESADVANCED

List of Users

Synchronize With Active Directory+ Add New User

User Name ▲	First Name	Last Name	Email	
00000			vanes0@inter.com	  
000000			0000@0000	  
00000test				  
000ManualUser	Jack	Smith	jack@manual.com	  
001nadin	001	Review	nfarbman@interfacing.com	  
001test			nadin.farbman@gmail.com	  
002nadin	002	RESPONSIBLE	nfarbman1@interfacing.com	  
003nadin	003	ACCOUNTABLE	tes1t@interfacing.com	  
004nadin	004	CONSULTED	three@epc.com	  
005nadin	005	INFORMED	four@epc.com	  

« < 1 2 >

Show: 10 - 25 - 50

5. System Admin will receive a second notification in green saying the synchronization is complete































ADMIN

Synchronize with Active Directory complete.

GENERALENVIRONMENTUSERSGROUPSSEARCHLANGUAGERISKATTRIBUTESADVANCED

List of Users

Synchronize With Active Directory+ Add New User

User Name ▲	First Name	Last Name	Email	
00000			vanes0@inter.com	  
000000			0000@0000	  
00000test				  
000ManualUser	Jack	Smith	jack@manual.com	  
001nadin	001	Review	nfarbman@interfacing.com	  
001test			nadin.farbman@gmail.com	  
002nadin	002	RESPONSIBLE	nfarbman1@interfacing.com	  
003nadin	003	ACCOUNTABLE	tes1t@interfacing.com	  
004nadin	004	CONSULTED	three@epc.com	  
005nadin	005	INFORMED	four@epc.com	  

« < 1 2 >

Show: 10 - 25 - 50

10.3.10 User Authorizations

System Administrators are responsible to grant a level of authorization to users. System Admins can set or change the authorization level for new or existing users when editing the Users's information.

The different levels of authorization are:

Item	Details
1. Modeler Access	User has access to the EPC Modeler
2. Web App Access	User has access to the EPC Web App
3. Administrator	User has administrative rights on the EPC Web App and the EPC Modeler

10.4 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.

The Group tab under the System Admin section displays a table with the List of Groups. Administrators can do the following:









































1. [Add a new group](#)
2. [Edit existing group](#)
3. [Delete groups](#)
4. [Add users to a group](#)
5. [Add an environment to a group](#)
6. [Set Group Security](#)
7. [Sort Group Table](#)
8. [Filter Group Table](#)

ADMIN

GENERAL
ENVIRONMENT
USERS
GROUPS
SEARCH
LANGUAGE
RISK
ATTRIBUTES
ADVANCED
MODELER

List of Groups

1 + Add New Group

7	Name ▲	Admin	Modeler Access	WebApp Access	
8					2 3 4 5
	Administrateur d'environnement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	   
	Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	   
	Ann Elaine's Group	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	   
	Authenticated Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	   
	Blake_Modeler	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	   
	Blake_WebApp	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	   
	Can add new group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	   
	Everyone	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	   
	Formation modélisateur	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	   
	GOP_BU_EPC_Modeler_Acquisitions et développement corp...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	   

« < 1 2 > »

Show: 10 - 25 - 50

10.4.1 Add Group

Under the Group tab, System Admins are responsible to create groups and assign the users that will have access to the group

How to Add an Environment

1. Login to the EPC
2. Navigate to the System Admin Section
3. Select the Environment tab within the System Admin Section. You will be navigated to the Environment management page.

ADMIN

GENERAL ENVIRONMENT USERS **GROUPS** SEARCH LANGUAGE RISK ATTRIBUTES ADVANCED MODELER

List of Groups [+ Add New Group](#)

Name ▲	Admin	Modeler Access	Portal Access	
Administrateur d'environnement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Ann Elaine's Group	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Authenticated Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Blake_Modeler	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Blake_WebApp	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Can add new group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Everyone	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Formation modélisateur	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
GOP_BU_EPC_Modeler_Acquisitions et développ...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

« < 1 2 > »

Show: 10 - 25 - 50

4. Navigate the cursor and select the [+ Add New Group](#) box

ADMIN

GENERAL

ENVIRONMENT

USERS

GROUPS

SEARCH

LANGUAGE

RISK































ATTRIBUTES

ADVANCED

MODELER

List of Groups

+ Add New Group

Name ▲	Admin	Modeler Access	Portal Access	
Administrateur d'environnement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	  
Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	  
Ann Elaine's Group	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	  
Authenticated Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	  
Blake_Modeler	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	  
Blake_WebApp	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	  
Can add new group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	  
Everyone	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	  
Formation modélisateur	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	  
GOP_BU_EPC_Modeler_Acquisitions et développ...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	  

«

<

1

2

>

»

Show: 10 - 25 - 50

5. This will create a pop-up window allowing System Admins to fill in the appropriate information. For this example, the name of the new group is “Manual Group” and the group has access to EPC portal

ADMIN
GENERAL
ENVIRONN
ADVANCED
MODELER

List of Groups
Name ▲
Administrateur d'environnement
Administrators
Ann Elaine's Group
Authenticated Users
Blake_Modeler
Blake_WebApp
Can add new group
Everyone
Formation modélisateur

Add New Group

Name *
Manual Group

System Administrator
☐


Access to EPC Modeler
☐

Access to EPC Portal
☒

System Group
☐

Cancel
Add

+ Add New Group

6. Populate the profile with the appropriate information and then select the  button and the Group will be added to the EPC.

10.4.2 Edit Existing Group































When needed, administrators can edit the Group information. System Admins can perform in-line edits for information displayed in the group list, or can navigate to the edit section for further editing capabilities.

In-Line Editing

In line edits can be performed by selecting item's name directly within the Group list. Simply click on the name you desire to edit and type in the edited name

List of Groups

[+ Add New Group](#)

Name ▲	Admin	Modeler Access	Portal Access	
<input type="text"/>				
GOP_BU_EPC_Standard_VPSLP	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	  
Group Env Level	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	  
Group Read Only	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	  
Group Test	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	  
Manual Group	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	  
Modeler Access	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	  
Nadin	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	  
Nadin's Gourp	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	  
New Environment Admins	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	  
Projet - Prêt Hypothécaire	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	  









































In line edits can also be performed to choose the level of access for the group. Simply check the icons

☐ ☒


for the level of access you desire to add or remove to or from the Group.

List of Groups

[+ Add New Group](#)









































Name ▲	Admin	Modeler Access	Portal Access	
<input type="text"/>				
GOP_BU_EPC_Standard_VPSI_P	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	   
Group Env Level	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	   
Group Read Only	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	   
Group Test	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	   
Manual Group	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	   
Modeler Access	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	   
Nadin	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	   
Nadin's Gourp	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	   
New Environment Admins	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	   
Projet - Prêt Hypothécaire	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	   

Editing Window

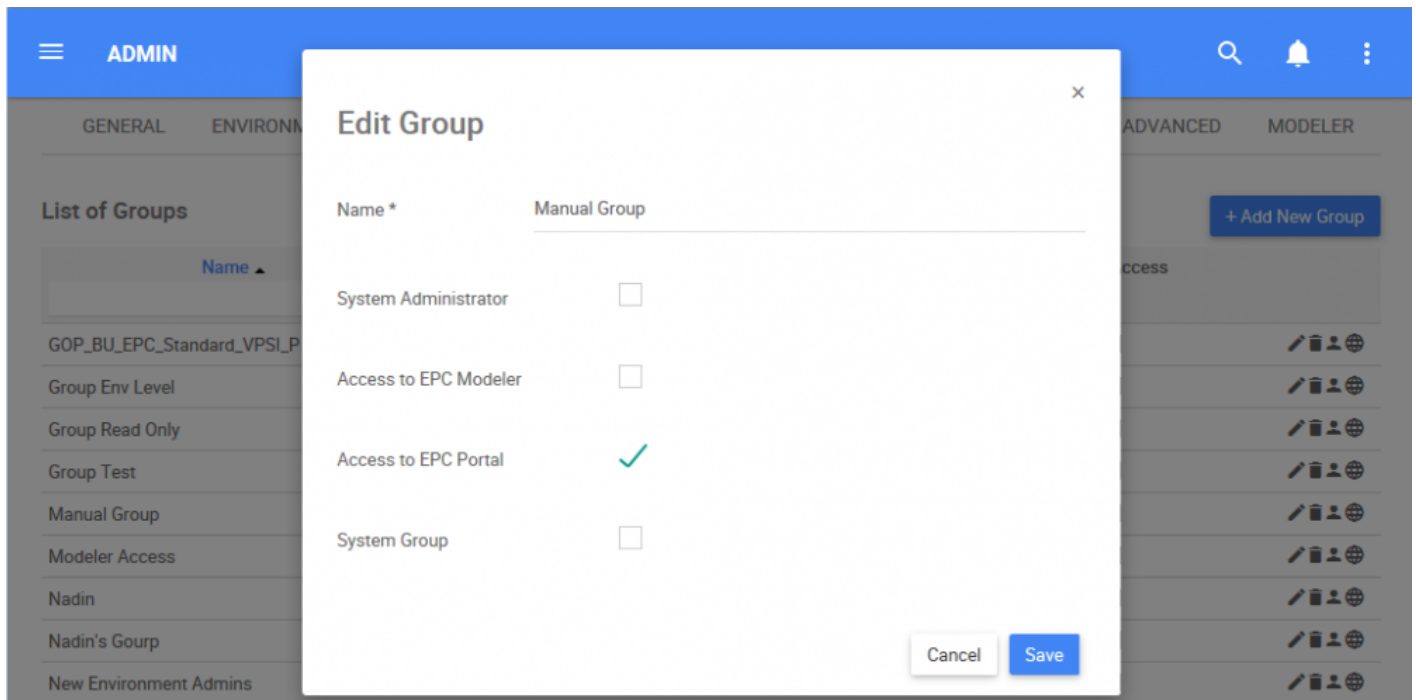
1. For further editing capabilities, navigate the cursor and select the  icon featured on the right hand-side of each user.

List of Groups

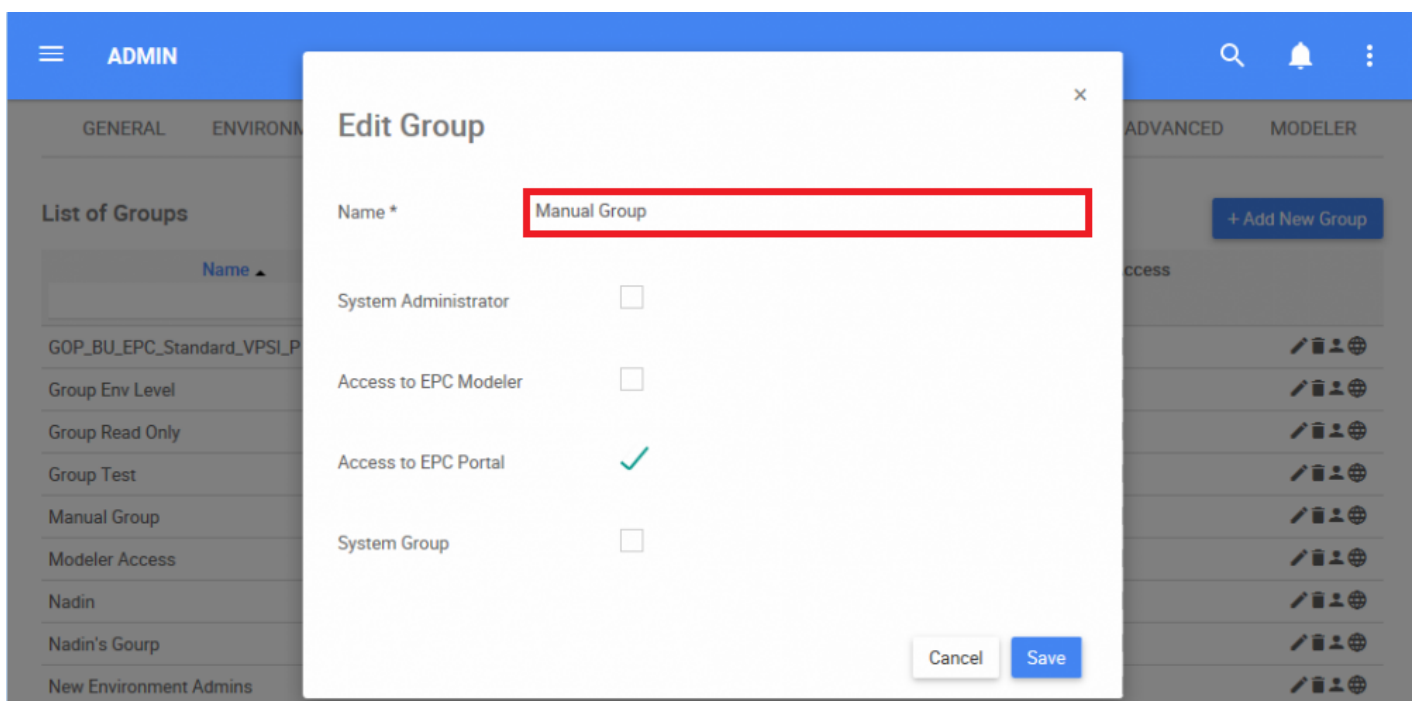
[+ Add New Group](#)

Name ▲	Admin	Modeler Access	Portal Access	
<input type="text"/>				
GOP_BU_EPC_Standard_VPSI_P	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	   
Group Env Level	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	   
Group Read Only	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	   
Group Test	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	   
Manual Group	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	   
Modeler Access	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	   
Nadin	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	   
Nadin's Gourp	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	   
New Environment Admins	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	   
Projet - Prêt Hypothécaire	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	   

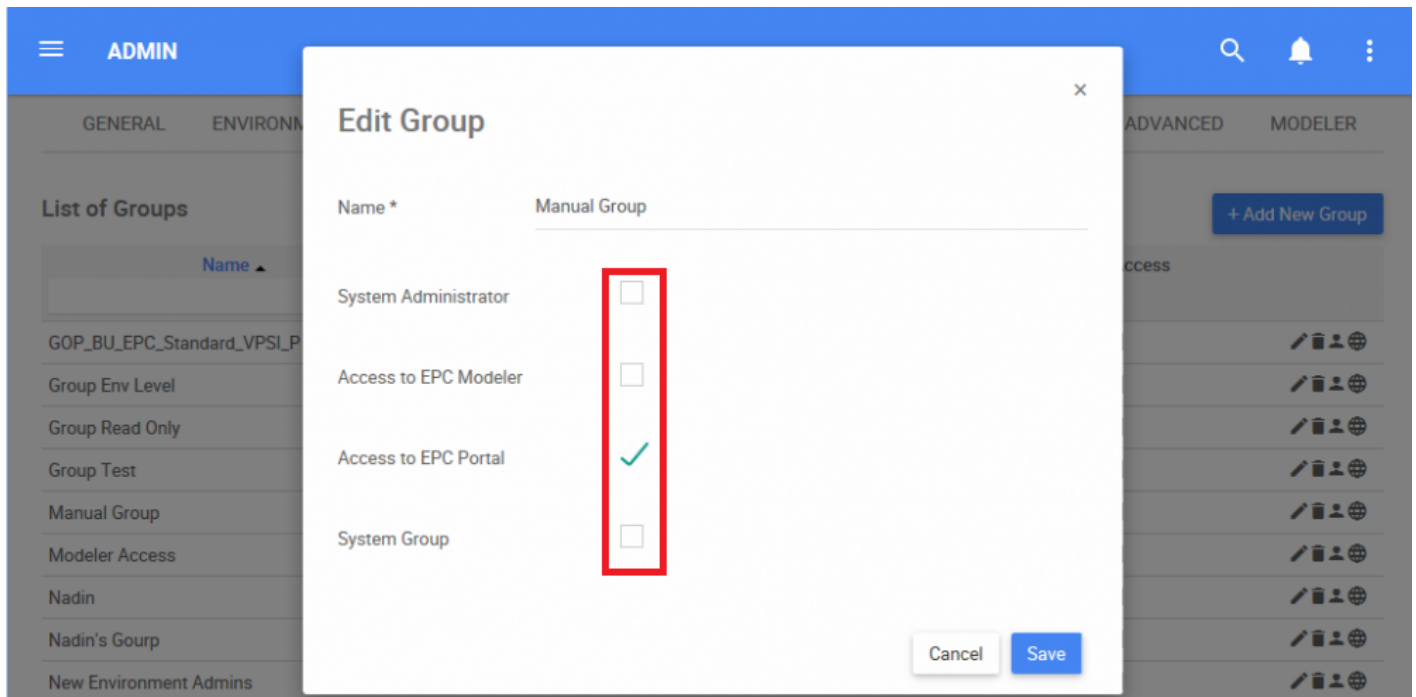
2. Selecting this item will re-open the full Group editing page.



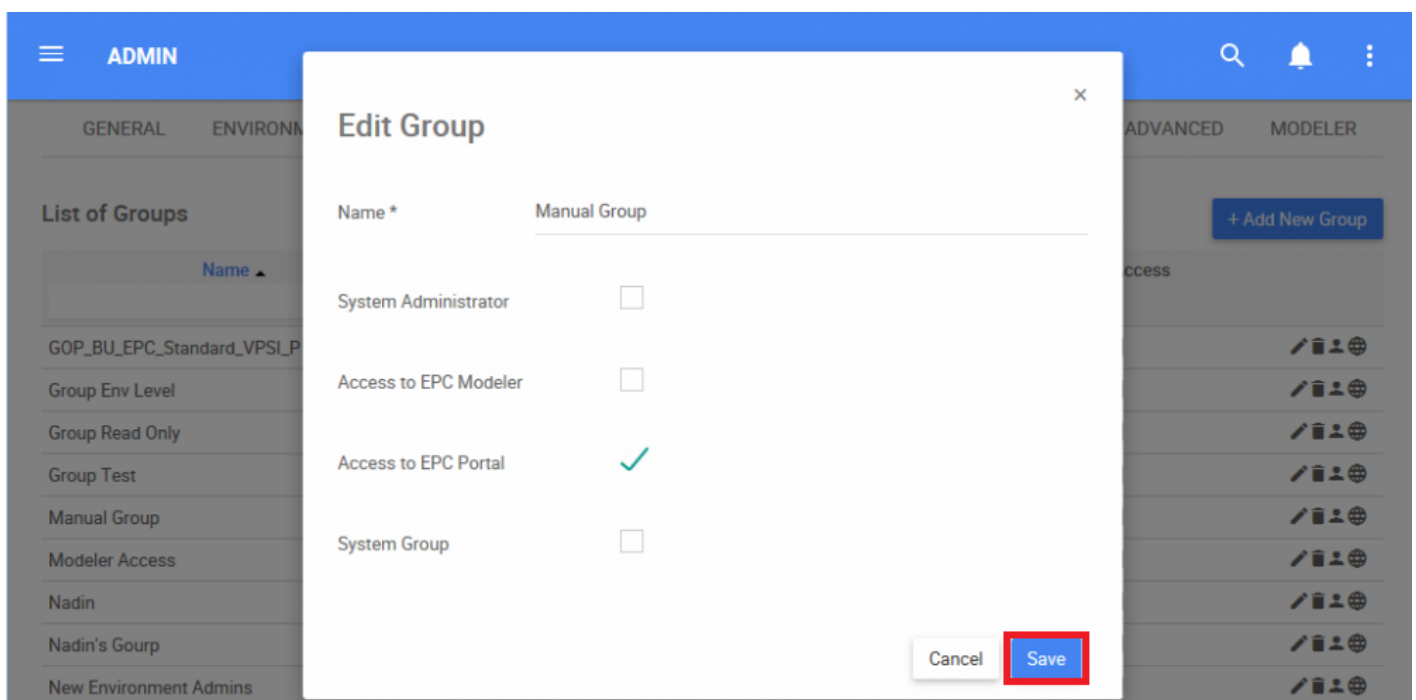
3. Click on the "Name box" and edit the name of the environment



4. Check the icons ☐ ☒ for the level of access you desire to edit



4. Select the “Save” button to confirm changes



10.4.3 Delete Group









































Under the Group tab, System Admins can delete Groups that are no longer useful.

How to Delete an Environment

1. Navigate the cursor and select the  icon for the Group you want to delete

List of Groups

[+ Add New Group](#)

Name ▲	Admin	Modeler Access	Portal Access	
GOP_BU_EPC_Standard_VPSI_P	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	   
Group Env Level	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	   
Group Read Only	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	   
Group Test	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	   
Manual Group	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	   
Modeler Access	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	   
Nadin	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	   
Nadin's Gourp	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	   
New Environment Admins	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	   
Projet - Prêt Hypothécaire	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	   

2. The following box will appear and you will be able to delete the Group by clicking on the “Delete” box

Confirm Delete



Delete group Manual Group?


[Cancel](#)[Delete](#)

10.4.4 Add User to Group

Under the Group tab, System Admins can add [Users](#) to Groups. Once the user is added, he will be able to see all the information available within the Group.









































* All deny access' for a user override any other permission awarded on a group.

How to Add a User to a Group

1. Navigate the cursor and select the  icon for the Group you want to add users to

List of Groups

[+ Add New Group](#)

Name ▲	Admin	Modeler Access	Portal Access	
GOP_BU_EPC_Standard_VPSI_P	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	   
Group Env Level	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	   
Group Read Only	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	   
Group Test	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	   
Manual Group	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	   
Modeler Access	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	   
Nadin	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	   
Nadin's Gourp	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	   
New Environment Admins	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	   
Projet - Prêt Hypothécaire	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	   

2. Navigate to the “Select a User” search box

* The list of groups will populate below based on key word typing

Edit Users of: Manual Environment

To add a user to the environment, type the desired username, first or last name below and click on the desired user within the drop down.

Select a User

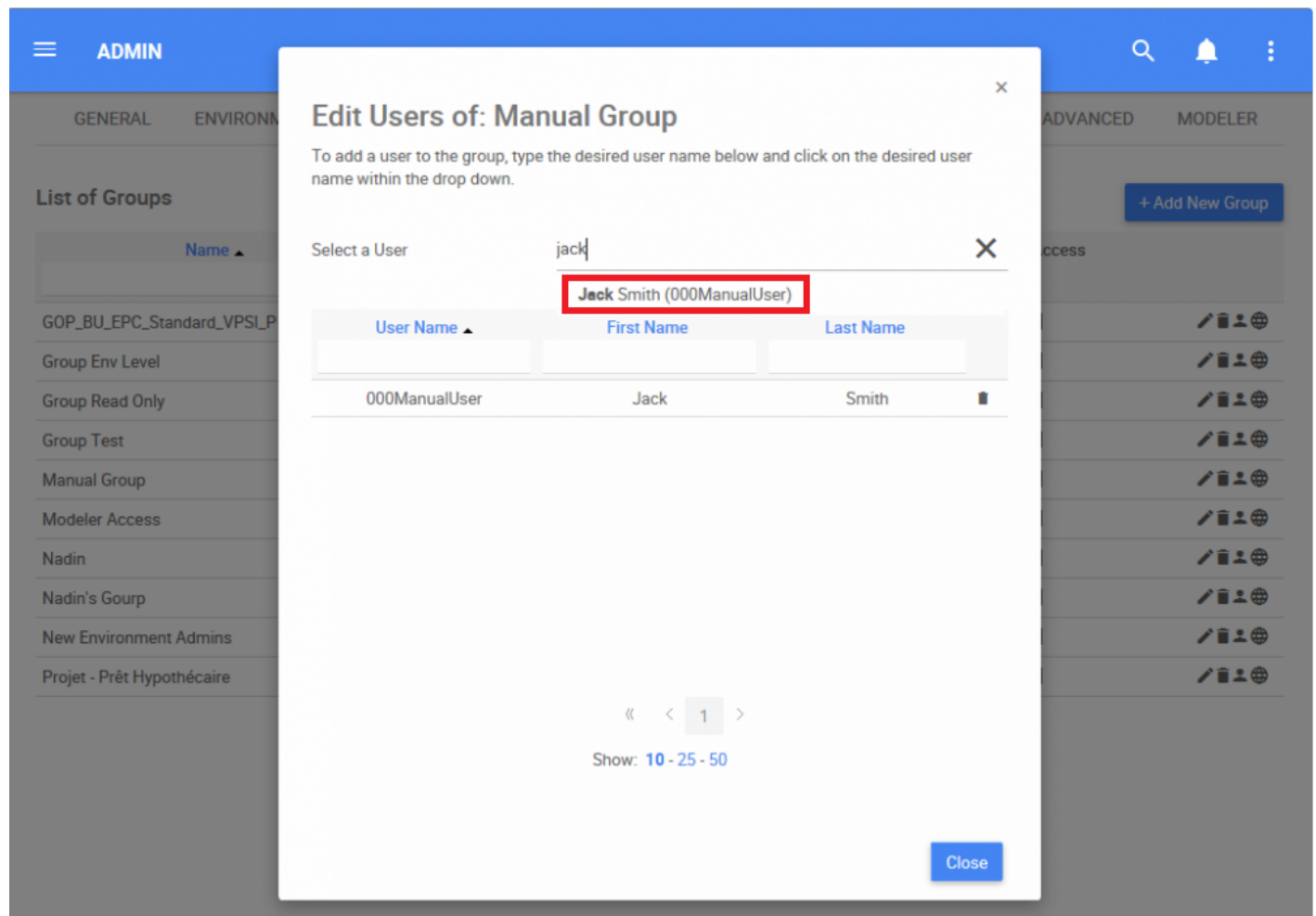
User Name	First Name	Last Name	Environment Admin	Full Control Allow	Write Delete Allow	Write Allow	Read Allow	Approval Allow	Full Control Deny	Write Delete Deny	Write Deny	Read Deny	Approval Deny
-----------	------------	-----------	-------------------	--------------------	--------------------	-------------	------------	----------------	-------------------	-------------------	------------	-----------	---------------

« < 1 > »

Show: 10 - 25 - 50

Close

3. Type the name of the User you want to add to the environment. "Double Click" on the user to finish adding it



4. The added user will appear on the following table. The system admin will receive an automatic notification when the user is successfully added



This process may take a minute or two to be completed

ADMIN

GENERAL ENVIRONN

List of Groups

Name ▲

GOP_BU_EPC_Standard_VPSLP

Group Env Level

Group Read Only

Group Test

Manual Group

Modeler Access

Nadin

Nadin's Gourp

New Environment Admins

Projet - Prêt Hypothécaire

ADVANCED MODELER

+ Add New Group

ccess

Edit Users of: Manual Group

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

Select a User jack

User Name ▲	First Name	Last Name
000ManualUser	Jack	Smith


« < 1 > »

Show: 10 - 25 - 50

Close









































User added to the group X


How to Remove a User from a Group

1. Navigate the cursor and select the  icon for the environment you want to remove users from

List of Groups

[+ Add New Group](#)

Name ▲	Admin	Modeler Access	Portal Access	
<input type="text"/>				
GOP_BU_EPC_Standard_VPSI_P	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	   
Group Env Level	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	   
Group Read Only	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	   
Group Test	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	   
Manual Group	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	   
Modeler Access	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	   
Nadin	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	   
Nadin's Gourp	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	   
New Environment Admins	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	   
Projet - Prêt Hypothécaire	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	   


2. Navigate the cursor and select the  icon

×

Edit Users of: Manual Group

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

Select a User

User Name ▲	First Name	Last Name	
000ManualUser	Jack	Smith	

« < 1 > »

Show: 10 - 25 - 50

Close

3. The following box will appear, select the “Remove” box to remove an user from an environment

Confirm Remove



Remove user: **000ManualUser** from group: **Manual Group**?

Cancel


Remove

10.4.5 Add Environment to Group

Under the Group tab, System Admins can add [Environments](#) to Groups. By adding an Environment to a Group, the Group will have access to EPC. System Admins can view these environments within the Environment tab, or can view which Environment is used by a Group directly within the Group tab.









































 All deny access' on an environment override any other permission awarded on a group.

How to Add an Environment to a Group

1. Navigate the cursor and select the  icon for the environment you want to add a group to

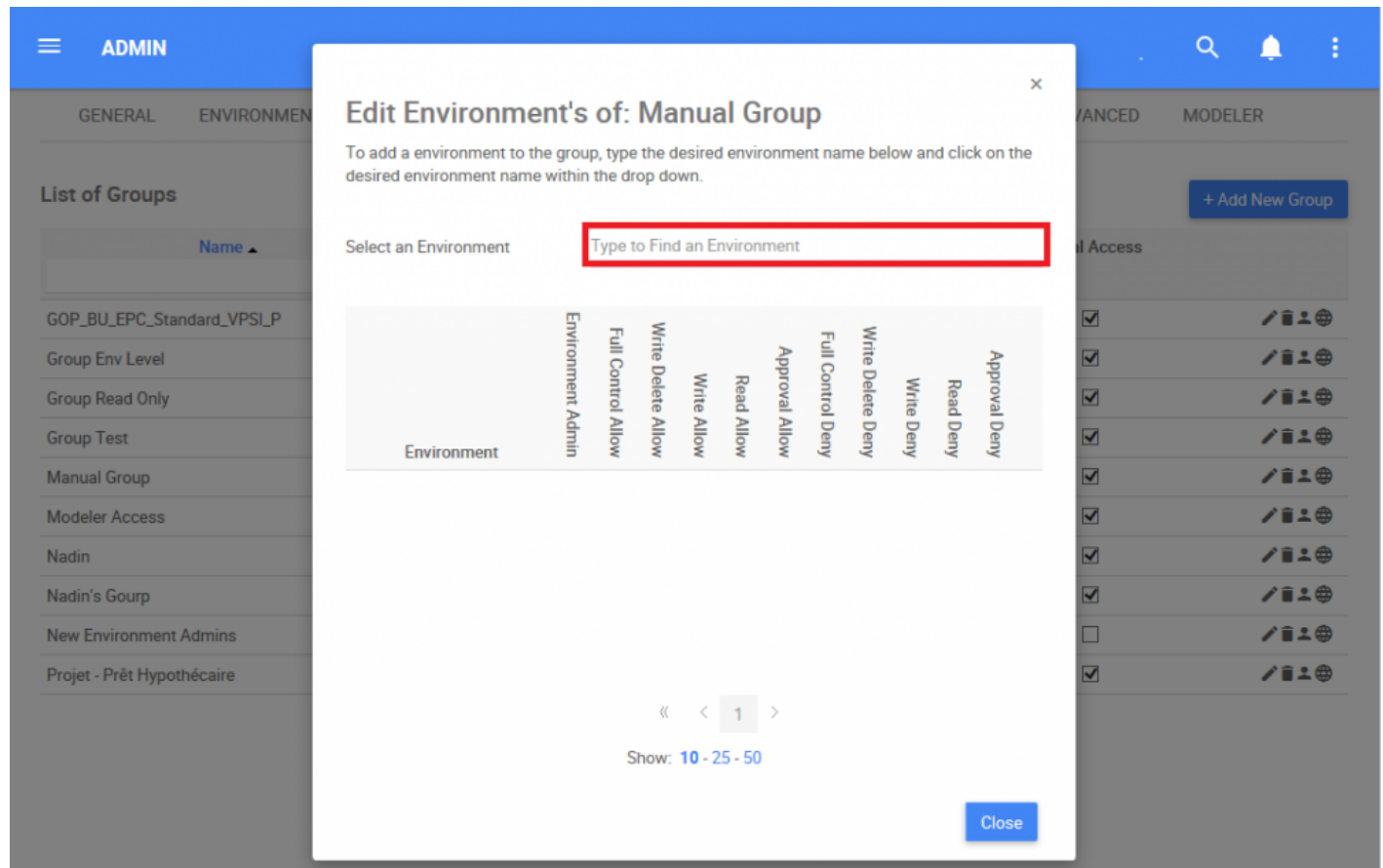
List of Groups

[+ Add New Group](#)

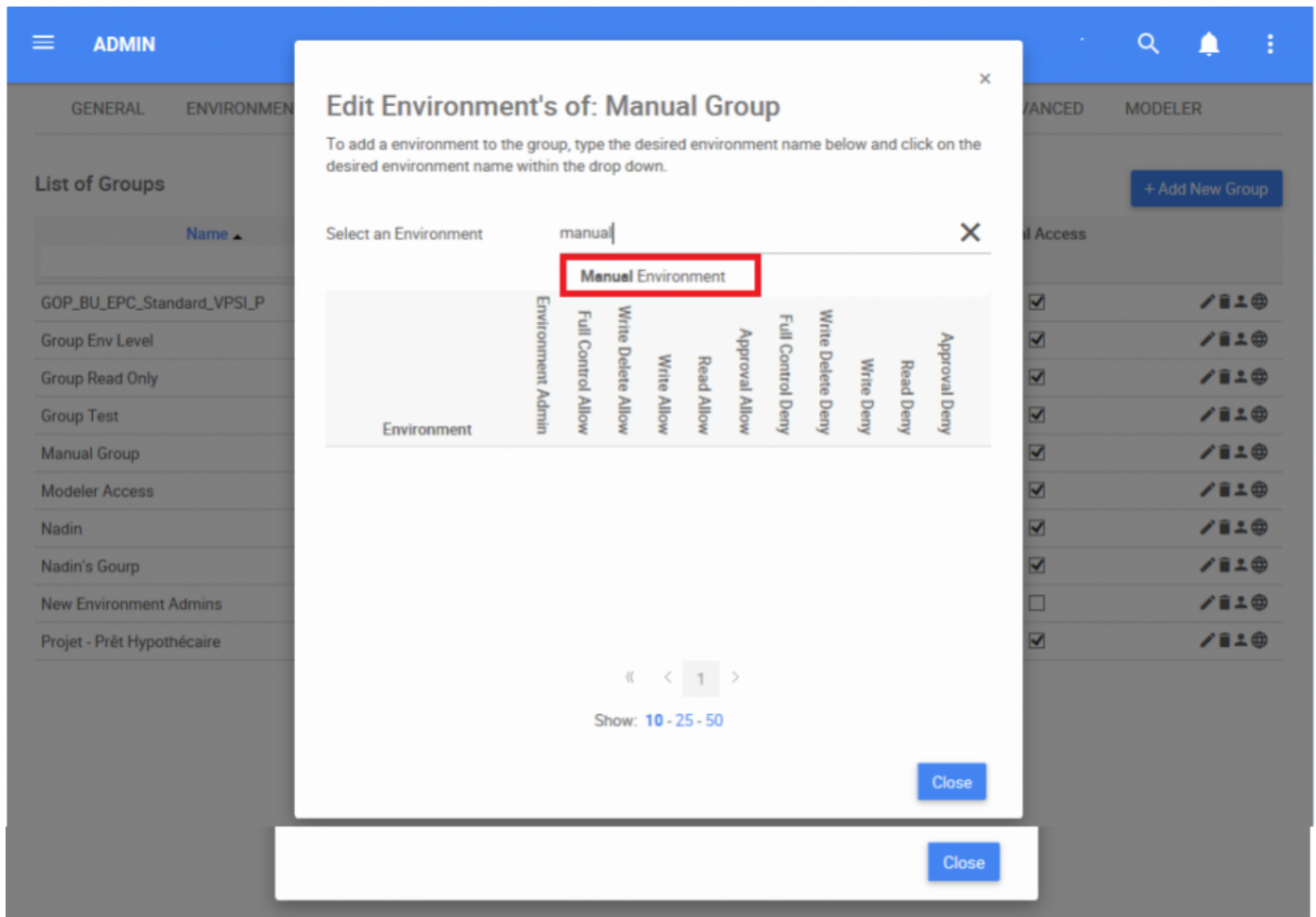
Name ▲	Admin	Modeler Access	Portal Access	
GOP_BU_EPC_Standard_VPSI_P	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	   
Group Env Level	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	   
Group Read Only	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	   
Group Test	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	   
Manual Group	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	   
Modeler Access	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	   
Nadin	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	   
Nadin's Gourp	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	   
New Environment Admins	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	   
Projet - Prêt Hypothécaire	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	   

2. Navigate to the “Select an Environment” search box

 The list of environments will populate below based on key word typing



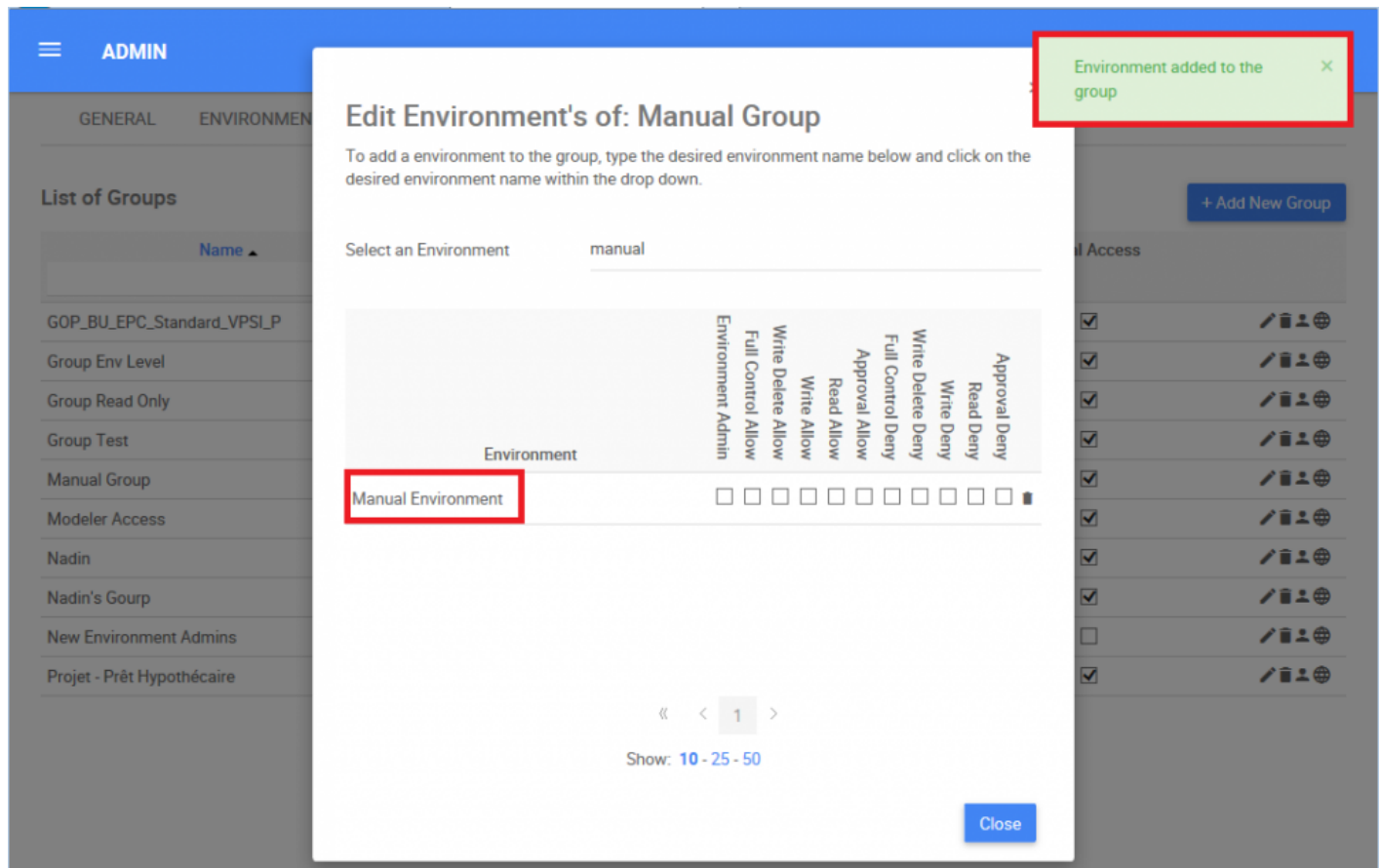
3. Type the name of the Environment you want to add to the Group. “Double Click” on the Environment to finish adding it



4. The added Environment will appear on the following table. The system admin will receive an automatic notification when the Environment is successfully added



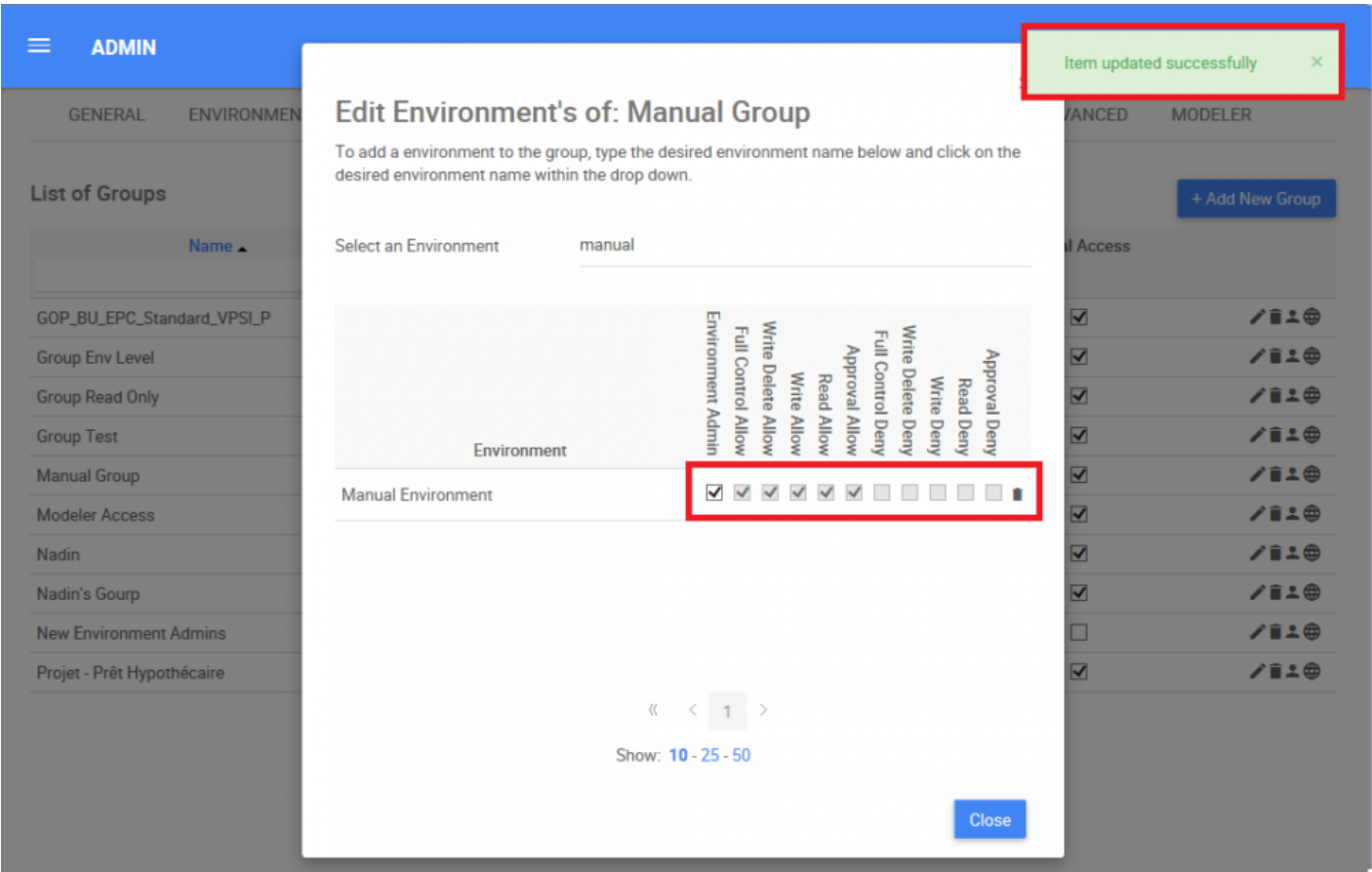
This process may take a minute or two to be completed




5. Add the [Level of Security](#) for the Group. For this example, the “Environment Admin” option is chosen. The system admin will receive an automatic notification when the level of security is successfully added. Refer to the following table to view all the levels of security

Level of Security	Details
Environment admin	User has full control of the group as well as access to the Environment Admin section
Full Control Allow	User has full control of the group
Write Delete Allow	User is allowed to write and delete on the group
Write Allow	User is allowed to write on the group
Read Allow	User is allowed to read on the group
Approval Allow	User is allowed to approve on the group
Full Control Deny	User is fully denied on the group
Write Delete Deny	User is denied to write and delete on the group
Write Deny	User is denied to write on the group
Read Deny	User is denied to read on the group

Approval Deny	User is denied to approve on the group
---------------	--












































How to Remove an Environment from a Group

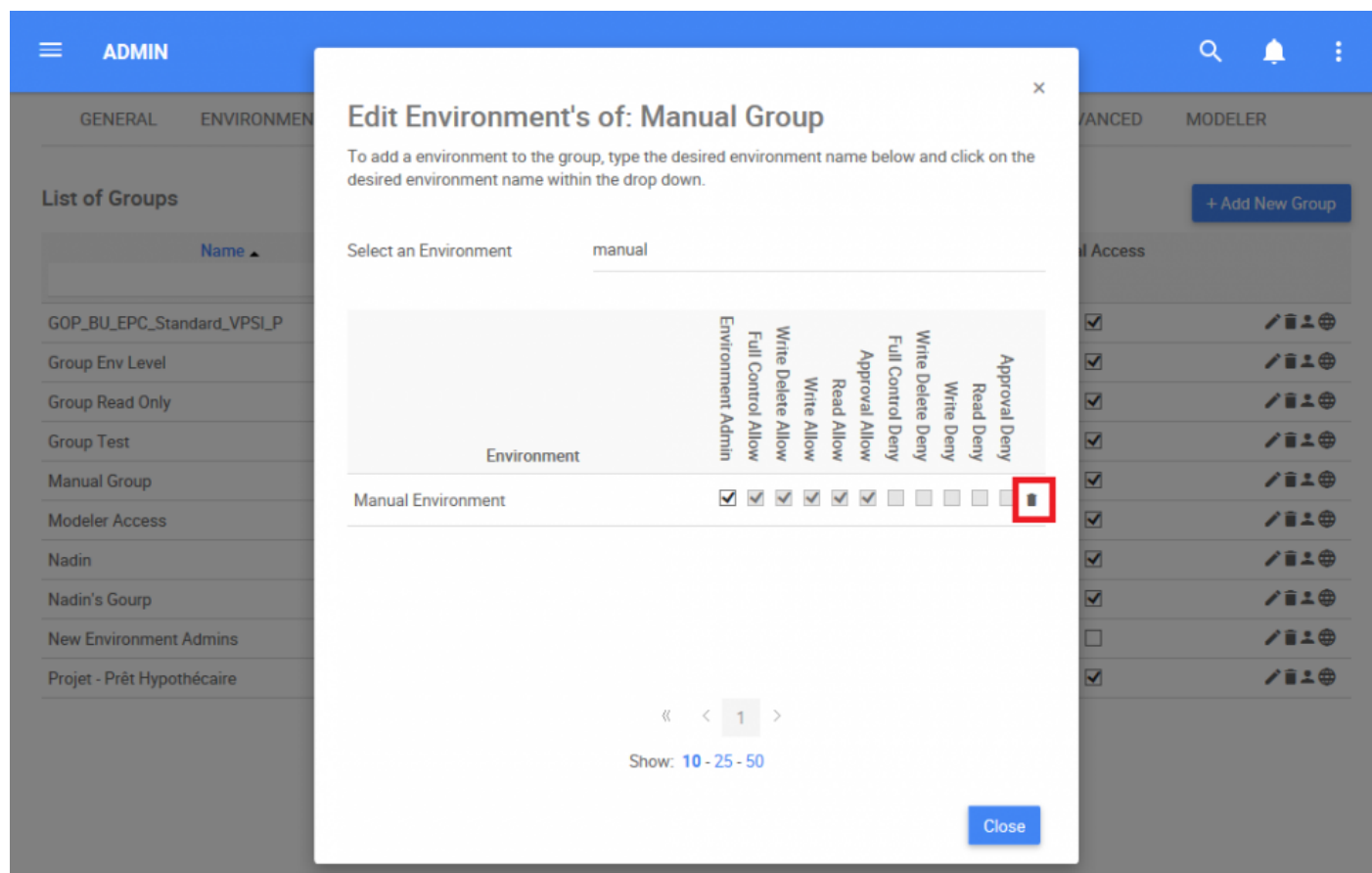
1. Navigate the cursor and select the  icon for the Group you want to remove an Environment from

List of Groups

+ Add New Group

Name ▲	Admin	Modeler Access	Portal Access	
GOP_BU_EPC_Standard_VPSI_P	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	   
Group Env Level	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	   
Group Read Only	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	   
Group Test	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	   
Manual Group	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	   
Modeler Access	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	   
Nadin	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	   
Nadin's Gourp	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	   
New Environment Admins	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	   
Projet - Prêt Hypothécaire	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	   

2. Navigate the cursor and select the  icon



Edit Environment's of: Manual Group

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

Select an Environment

Environment	Environment Admin	Full Control Allow	Write Delete Allow	Read Allow	Approval Allow	Full Control Deny	Write Deny	Read Deny	Approval Deny
Manual Environment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

« < 1 > »

Show: 10 - 25 - 50

Close

3. The following box will appear, select the “Remove” box to remove an Environment from a Group

Confirm Remove



Remove Environment: **Manual Environment** from group: **Manual Group**?

Cancel

Remove

10.4.6 Set Group Security

Different levels of security can be assigned to [Environments](#) when added to a Group

Level of Security	Details
Environment admin	User has full control of the group as well as access to the Environment Admin section
Full Control Allow	User has full control of the group
Write Delete Allow	User is allowed to write and delete on the group
Write Allow	User is allowed to write on the group
Read Allow	User is allowed to read on the group
Approval Allow	User is allowed to approve on the group
Full Control Deny	User is fully denied on the group
Write Delete Deny	User is denied to write and delete on the group
Write Deny	User is denied to write on the group
Read Deny	User is denied to read on the group
Approval Deny	User is denied to approve on the group



All deny access' will always override any other permission awarded on an environment or an object for a group

1. Environment Admin

Environment Admin	Full Control Allow	Write Delete Allow	Write Allow	Read Allow	Approval Allow	Full Control Deny	Write Delete Deny	Write Deny	Read Deny	Approval Deny
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. Full Control Allow

Approval Deny	<input type="checkbox"/>
Read Deny	<input type="checkbox"/>
Write Deny	<input type="checkbox"/>
Write Delete Deny	<input type="checkbox"/>
Full Control Deny	<input type="checkbox"/>
Approval Allow	<input checked="" type="checkbox"/>
Read Allow	<input checked="" type="checkbox"/>
Write Allow	<input checked="" type="checkbox"/>
Write Delete Allow	<input checked="" type="checkbox"/>
Full Control Allow	<input checked="" type="checkbox"/>
Environment Admin	<input type="checkbox"/>

3. Write Delete Allow

Approval Deny	<input type="checkbox"/>
Read Deny	<input type="checkbox"/>
Write Deny	<input type="checkbox"/>
Write Delete Deny	<input type="checkbox"/>
Full Control Deny	<input type="checkbox"/>
Approval Allow	<input type="checkbox"/>
Read Allow	<input checked="" type="checkbox"/>
Write Allow	<input checked="" type="checkbox"/>
Write Delete Allow	<input checked="" type="checkbox"/>
Full Control Allow	<input type="checkbox"/>
Environment Admin	<input type="checkbox"/>

4. Write Allow

Approval Deny	<input type="checkbox"/>
Read Deny	<input type="checkbox"/>
Write Deny	<input type="checkbox"/>
Write Delete Deny	<input type="checkbox"/>
Full Control Deny	<input type="checkbox"/>
Approval Allow	<input type="checkbox"/>
Read Allow	<input checked="" type="checkbox"/>
Write Allow	<input checked="" type="checkbox"/>
Write Delete Allow	<input type="checkbox"/>
Full Control Allow	<input type="checkbox"/>
Environment Admin	<input type="checkbox"/>

5. Read Allow

Approval Deny	<input type="checkbox"/>
Read Deny	<input type="checkbox"/>
Write Deny	<input type="checkbox"/>
Write Delete Deny	<input type="checkbox"/>
Full Control Deny	<input type="checkbox"/>
Approval Allow	<input type="checkbox"/>
Read Allow	<input checked="" type="checkbox"/>
Write Allow	<input type="checkbox"/>
Write Delete Allow	<input type="checkbox"/>
Full Control Allow	<input type="checkbox"/>
Environment Admin	<input type="checkbox"/>

6. Approval Allow

Approval Deny	<input type="checkbox"/>
Read Deny	<input type="checkbox"/>
Write Deny	<input type="checkbox"/>
Write Delete Deny	<input type="checkbox"/>
Full Control Deny	<input type="checkbox"/>
Approval Allow	<input checked="" type="checkbox"/>
Read Allow	<input checked="" type="checkbox"/>
Write Allow	<input type="checkbox"/>
Write Delete Allow	<input type="checkbox"/>
Full Control Allow	<input type="checkbox"/>
Environment Admin	<input type="checkbox"/>

7. Full Control Deny

Approval Deny	<input checked="" type="checkbox"/>
Read Deny	<input checked="" type="checkbox"/>
Write Deny	<input checked="" type="checkbox"/>
Write Delete Deny	<input checked="" type="checkbox"/>
Full Control Deny	<input checked="" type="checkbox"/>
Approval Allow	<input type="checkbox"/>
Read Allow	<input type="checkbox"/>
Write Allow	<input type="checkbox"/>
Write Delete Allow	<input type="checkbox"/>
Full Control Allow	<input type="checkbox"/>
Environment Admin	<input type="checkbox"/>

8. Write Delete Deny

Approval Deny	<input checked="" type="checkbox"/>
Read Deny	<input checked="" type="checkbox"/>
Write Deny	<input checked="" type="checkbox"/>
Write Delete Deny	<input checked="" type="checkbox"/>
Full Control Deny	<input type="checkbox"/>
Approval Allow	<input type="checkbox"/>
Read Allow	<input type="checkbox"/>
Write Allow	<input type="checkbox"/>
Write Delete Allow	<input type="checkbox"/>
Full Control Allow	<input type="checkbox"/>
Environment Admin	<input type="checkbox"/>

9. Write Deny

Approval Deny	<input type="checkbox"/>
Read Deny	<input type="checkbox"/>
Write Deny	<input checked="" type="checkbox"/>
Write Delete Deny	<input checked="" type="checkbox"/>
Full Control Deny	<input type="checkbox"/>
Approval Allow	<input type="checkbox"/>
Read Allow	<input type="checkbox"/>
Write Allow	<input type="checkbox"/>
Write Delete Allow	<input type="checkbox"/>
Full Control Allow	<input type="checkbox"/>
Environment Admin	<input type="checkbox"/>

10. Read Deny

Approval Deny	<input checked="" type="checkbox"/>
Read Deny	<input checked="" type="checkbox"/>
Write Deny	<input checked="" type="checkbox"/>
Write Delete Deny	<input checked="" type="checkbox"/>
Full Control Deny	<input checked="" type="checkbox"/>
Approval Allow	<input type="checkbox"/>
Read Allow	<input type="checkbox"/>
Write Allow	<input type="checkbox"/>
Write Delete Allow	<input type="checkbox"/>
Full Control Allow	<input type="checkbox"/>
Environment Admin	<input type="checkbox"/>

11. Approval Deny

Approval Deny	<input checked="" type="checkbox"/>
Read Deny	<input type="checkbox"/>
Write Deny	<input type="checkbox"/>
Write Delete Deny	<input type="checkbox"/>
Full Control Deny	<input type="checkbox"/>
Approval Allow	<input type="checkbox"/>
Read Allow	<input type="checkbox"/>
Write Allow	<input type="checkbox"/>
Write Delete Allow	<input type="checkbox"/>
Full Control Allow	<input type="checkbox"/>
Environment Admin	<input type="checkbox"/>

10.4.7 Sort Group Table

In order to facilitate navigation, the WebApp allows System Admins to easily sort the Groups table. Admins can sort Groups on ascending or descending order by clicking on the “Name” box.

How to use “Sorting” Function

1. Navigate to the System Admin section
2. Navigate the Environment Tab
3. Click on the **Name**

1-Click will sort the Name in Ascending order, reflected by ▲

2-Clicks will sort the Name 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”.

ADMIN

GENERAL

ENVIRONMENT

USERS

GROUPS

SEARCH

LANGUAGE

RISK































ATTRIBUTES

ADVANCED

MODELER

List of Groups

+ Add New Group

Name ▴	Admin	Modeler Access	WebApp Access	
Administrateur d'environnement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	  
Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	  
Ann Elaine's Group	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	  
Authenticated Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	  
Blake_Modeler	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	  
Blake_WebApp	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	  
Can add new group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	  
Everyone	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	  
Formation modélisateur	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	  
GOP_BU_EPC_Modeler_Acquisitions et développement corporati...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	  

«

<

1

2

>

»

Show: 10 - 25 - 50

« < 1 2 > »

Show: 10 - 25 - 50

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

ADMIN

GENERAL

ENVIRONMENT

USERS

GROUPS

SEARCH

LANGUAGE

RISK































ATTRIBUTES

ADVANCED

MODELER

List of Groups

+ Add New Group

Name	Admin	Modeler Access	WebApp Access	
VBM	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	  
Risk Module	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	  
Projet - GRRO	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	  
Projet - Prêt Hypothécaire	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	  
New Environment Admins	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	  
Nadin's Gourp	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	  
Nadin	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	  
Modeler Access	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	  
Manual Group	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	  
Group Test	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	  

« < 1 2 > »

Show: 10 - 25 - 50

10.4.8 Filter Group Table

Admins can also search for a Group by typing the name of the environment on the search box.

The Filtering section will cover the following:

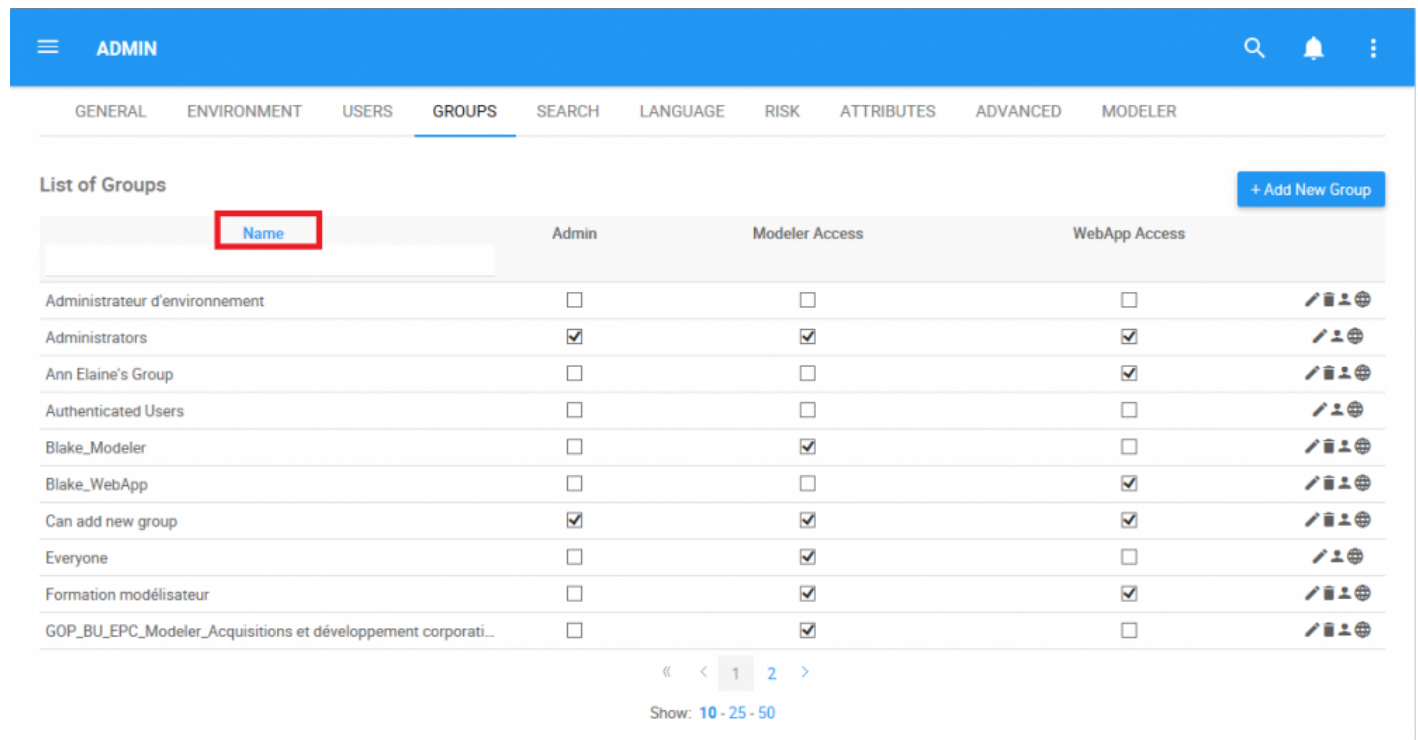
1. [How to Add Filters](#)
2. [How to Remove Filters](#)
3. [How to Combine Filters](#)

10.4.8.1 Add Filter

System Admins can add filters to see the items of its choice. **Type** what you are looking for to filter the list

How to Add Filter

1. Navigate cursor and select the “Name”



The screenshot shows the 'ADMIN' interface with the 'GROUPS' tab selected. The 'List of Groups' section contains a table with the following columns: Name, Admin, Modeler Access, and WebApp Access. The 'Name' column header is highlighted with a red box. A search bar is located at the top right of the table. The table lists several groups, including 'Administrateur d'environnement', 'Administrators', 'Ann Elaine's Group', 'Authenticated Users', 'Blake_Modeler', 'Blake_WebApp', 'Can add new group', 'Everyone', 'Formation modélisateur', and 'GOP_BU_EPC_Modeler_Acquisitions et développement corporati...'. Each group has checkboxes for 'Admin', 'Modeler Access', and 'WebApp Access'. The 'Name' column is currently empty, indicating that a filter has not yet been applied.

Name	Admin	Modeler Access	WebApp Access
Administrateur d'environnement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Ann Elaine's Group	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Authenticated Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Blake_Modeler	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Blake_WebApp	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Can add new group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Everyone	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Formation modélisateur	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
GOP_BU_EPC_Modeler_Acquisitions et développement corporati...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>































2. Type the word you are looking for to filter the list on the search box and click on “enter”

ADMIN

GENERALENVIRONMENTUSERSGROUPSSEARCHLANGUAGERISKATTRIBUTESADVANCEDMODELER

List of Groups

+ Add New Group

Name	Admin	Modeler Access	WebApp Access	
Administrateur d'environnement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	  
Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	  
Ann Elaine's Group	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	  
Authenticated Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	  
Blake_Modeler	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	  
Blake_WebApp	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	  
Can add new group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	  
Everyone	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	  
Formation modélisateur	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	  
GOP_BU_EPC_Modeler_Acquisitions et développement corporati...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	  

« < 1 2 >

Show: 10 - 25 - 50




3. For this example, we will type “ya.” The EPC will populate the results with the new filter

ADMIN

GENERALENVIRONMENTUSERSGROUPSSEARCHLANGUAGERISKATTRIBUTESADVANCEDMODELER

List of Groups


+ Add New Group

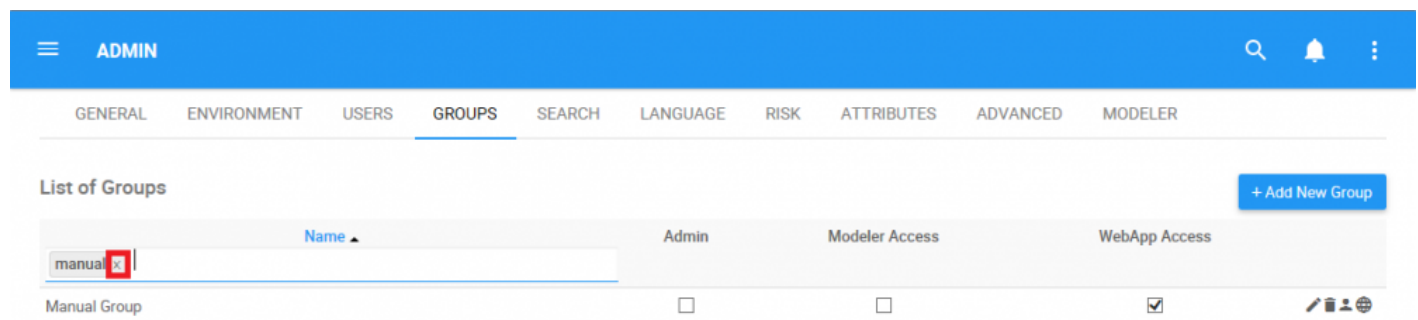
Name	Admin	Modeler Access	WebApp Access	
Manual Group	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	  

10.4.8.2 Remove Filter

System Administrators are able to **Remove Filters** on the Groups Table after adding a filter

How to Remove Filter

1. System Admin first needs to add a filter. Refer to [How to Add a Filter](#)
2. To remove the filter, click on the  button beside the filter name.



10.4.8.3 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](#)

10.5 Search

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.

ADMIN						
					SEARCH	
					GENERAL	ENVIRONMENT
					USERS	GROUPS
					LANGUAGE	RISK
					ATTRIBUTES	ADVANCED
					MODELER	
Search						
Env. Name	Language	Status	Loaded Items	Actions		
Alex - Import Visio Cavok	français	-			Create Index	Delete Index
Alex - Import Visio Cavok	English	-			Create Index	Delete Index
Alex - Performance	français	-			Create Index	Delete Index
Alex - Performance	English	-			Create Index	Delete Index
Bleke_Red_1	français	SEARCH_LOADED	2258		Create Index	Delete Index
Bleke_Red_1	English	SEARCH_LOADED	2258		Create Index	Delete Index

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
3. You will be navigated to the Search page

ADMIN

GENERAL

ENVIRONMENT

USERS

GROUPS

SEARCH

LANGUAGE

RISK

ATTRIBUTES

ADVANCED

MODELER

Search

Env. Name	Language	Status	Loaded Items	Actions	
Alex - Import Visio Cavok	français	-		<div></div>	<div>Create Index</div> <div>Delete Index</div>
Alex - Import Visio Cavok	English	-		<div></div>	<div>Create Index</div> <div>Delete Index</div>
Alex - Performance	français	-		<div></div>	<div>Create Index</div> <div>Delete Index</div>
Alex - Performance	English	-		<div></div>	<div>Create Index</div> <div>Delete Index</div>
Blake_Red_1	français	SEARCH_LOADED	2258	<div></div>	<div>Create Index</div> <div>Delete Index</div>
Blake_Red_1	English	SEARCH_LOADED	2258	<div></div>	<div>Create Index</div> <div>Delete Index</div>

4. To create the Index, select the  icon

ADMIN

GENERAL

ENVIRONMENT

USERS

GROUPS

SEARCH

LANGUAGE

RISK

ATTRIBUTES

ADVANCED

MODELER

Search

Env. Name	Language	Status	Loaded Items	Actions	
Alex - Import Visio Cavok	français	-		<div></div>	<div>Create Index</div> <div>Delete Index</div>
Alex - Import Visio Cavok	English	-		<div></div>	<div>Create Index</div> <div>Delete Index</div>
Alex - Performance	français	-		<div></div>	<div>Create Index</div> <div>Delete Index</div>
Alex - Performance	English	-		<div></div>	<div>Create Index</div> <div>Delete Index</div>
Blake_Red_1	français	SEARCH_LOADED	2258	<div></div>	<div>Create Index</div> <div>Delete Index</div>
Blake_Red_1	English	SEARCH_LOADED	2258	<div></div>	<div>Create Index</div> <div>Delete Index</div>

5. After the index has been created, select the refresh icon



ADMIN					
GENERAL ENVIRONMENT USERS GROUPS <u>SEARCH</u> LANGUAGE RISK ATTRIBUTES ADVANCED MODELER					
Search					
Env. Name	Language	Status	Loaded Items	Actions	
Alex - Import Visio Cavok	français	-			Create Index Delete Index
Alex - Import Visio Cavok	English	-			Create Index Delete Index
Alex - Performance	français	-			Create Index Delete Index
Alex - Performance	English	-			Create Index Delete Index
Bleke_Red_1	français	SEARCH_LOADED	2258		Create Index Delete Index
Bleke_Red_1	English	SEARCH_LOADED	2258		Create Index Delete Index

6. Once the refresh, the status of the upload will be reflected within the “Status” and “Loaded Items” section

ADMIN					
GENERAL ENVIRONMENT USERS GROUPS <u>SEARCH</u> LANGUAGE RISK ATTRIBUTES ADVANCED MODELER					
Search					
Env. Name	Language	Status	Loaded Items	Actions	
Alex - Import Visio Cavok	français	SEARCH_LOADED	247		Create Index Delete Index
Alex - Import Visio Cavok	English	-			Create Index Delete Index
Alex - Performance	français	-			Create Index Delete Index
Alex - Performance	English	-			Create Index Delete Index
Bleke_Red_1	français	SEARCH_LOADED	2258		Create Index Delete Index
Bleke_Red_1	English	SEARCH_LOADED	2258		Create Index Delete Index

* 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 or refresh indexes when traffic on the Web App is at a minimum (e.g. overnight).



Certain system settings can affect the speed of indexing and consequently, the performance of the WebApp. 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.

10.6 Language

System Admins have two main responsibilities regarding system languages. The responsibilities are as follows:

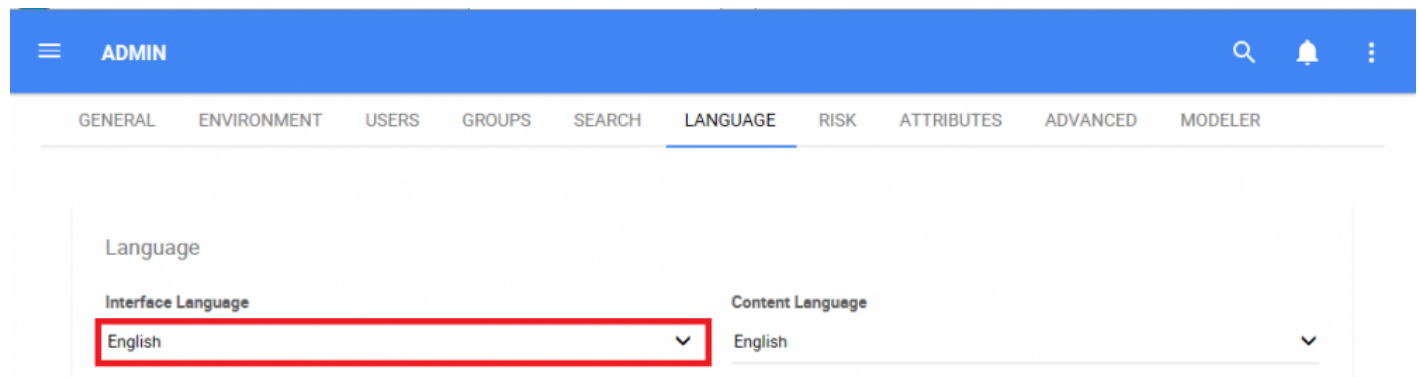
- [Manage Languages](#)
- [Apply New Languages](#)

10.6.1 Manage Languages

System Admins can select the Interface Language 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.

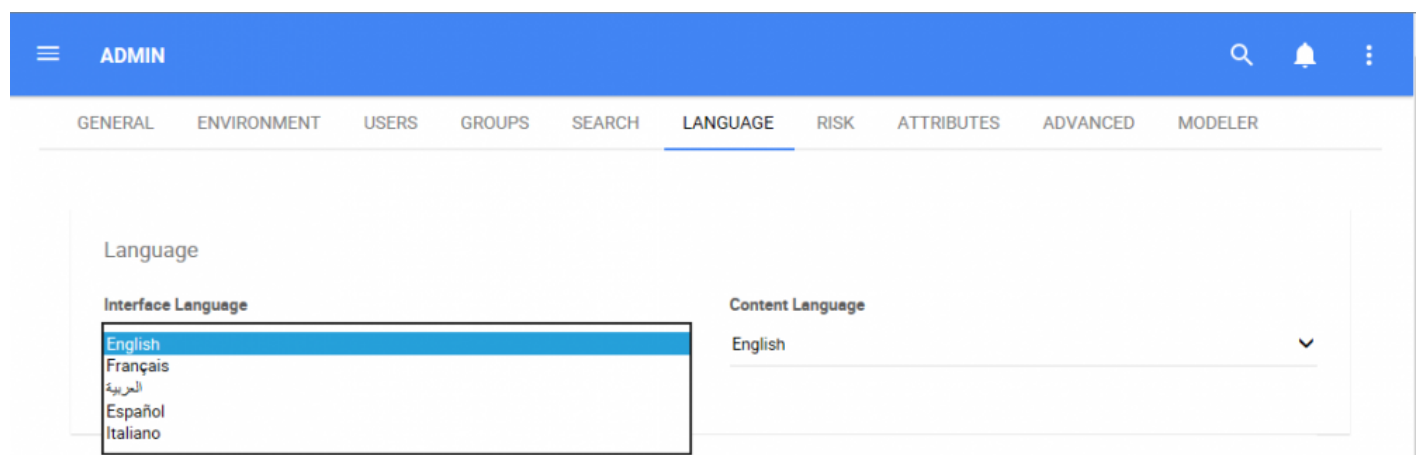
To toggle between languages, please see the steps below:

1. Navigate to the “System Admin” section of the EPC
2. Navigate to the Language tab
3. System admins can select the Interface Language or Content Language text box. For the following example, Interface Language is selected



The screenshot shows the EPC10 WebApp Admin interface. The top navigation bar is blue with the word 'ADMIN' and a search icon. Below it is a horizontal menu with tabs: GENERAL, ENVIRONMENT, USERS, GROUPS, SEARCH, LANGUAGE, RISK, ATTRIBUTES, ADVANCED, and MODELER. The 'LANGUAGE' tab is selected. The main content area is titled 'Language' and contains two dropdown menus. The 'Interface Language' dropdown is highlighted with a red box and shows 'English' selected. The 'Content Language' dropdown also shows 'English' selected.

4. It will generate a drop-down menu featuring **all** available languages.



The screenshot shows the EPC10 WebApp Admin interface. The top navigation bar is blue with the word 'ADMIN' and a search icon. Below it is a horizontal menu with tabs: GENERAL, ENVIRONMENT, USERS, GROUPS, SEARCH, LANGUAGE, RISK, ATTRIBUTES, ADVANCED, and MODELER. The 'LANGUAGE' tab is selected. The main content area is titled 'Language' and contains two dropdown menus. The 'Interface Language' dropdown is open, showing a list of available languages: English, Français, العربية, Español, and Italiano. The 'Content Language' dropdown also shows 'English' selected.



Changing content language requires EPC's **multilingual license**

10.6.2 Apply 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 since the modification will take an important amount of time to execute.

Please see the warning below:

Warning

The addition, deletion, or reordering of languages requires a modification on the database. This modification will take an important amount of time to execute and will compromise the usability experience for connected users. It is recommended that these changes be made when there are little or no connected users.



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.**

10.6.2.1 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:

	1	English	English	
	2	French	Français	
	3	Italian	Italiano	

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]

7	English	English, French, Italian	En
8	English	Spanish	N/A
9	French	English, French	Fr
10	French	English, Italian	[en]



Note: Any changes in language content will require the EPC Service to be restarted.

10.6.2.2 Add New Languages

To Apply a New Language

1. Navigate to the System Admin section
2. Select the Languages tab
3. In the Manage Content Languages, select the “Add New Language” toolbar

The screenshot displays the EPC10 WebApp Admin interface. At the top is a blue header bar with a hamburger menu icon, the word 'ADMIN', a search icon, a bell icon, and a vertical ellipsis icon. Below the header is a navigation bar with tabs: GENERAL, ENVIRONMENT, USERS, GROUPS, SEARCH, LANGUAGE (highlighted), RISK, ATTRIBUTES, ADVANCED, and MODELER. The main content area shows the 'Language' settings. There are two dropdown menus: 'Interface Language' set to 'English' and 'Content Language' set to 'English'. Below this is a section titled 'Manage Content Languages'. It contains a red 'Warning' message: 'The addition, deletion, or reordering of languages requires a modification on the database. This modification will take an important amount of time to execute and will compromise the usability experience for connected users. It is recommended that these changes be made when there are little or no connected users.' Below the warning is a form with a label 'Add New Language:' and a dropdown menu showing 'Abkhaz' and 'Аҧсҭа'. Below the form is a table with two rows: Row 1 has a blue hamburger icon, '1', 'French', 'Français', and a close icon 'x'; Row 2 has a blue hamburger icon, '2', 'English', 'English', and a close icon 'x'. At the bottom of the 'Manage Content Languages' section is a blue button labeled 'Apply New Language List'.

4. This will generate a drop-down menu featuring available languages
5. Select the desired language. For this example, choose Spanish

Manage Content Languages

Warning

The addition, deletion, or reordering of languages in the database. This modification will compromise the usability of the system if these changes be made without proper testing and documentation.

Add New Language:

1

French

Fra

2

English

En

Apply New Language List

Romansh

Rumantsch

Kirundi

Kirundi

Romanian

Română

Russian

Русский

Sanskrit

संस्कृतम्

Sardinian

Sardu

Sindhi

سنڌي

Northern Sami

Sámeigiella

Samoa

Gagana Samoa

Sango

Sängö

Serbian

Српски

Gaelic

Gàidhlig

Shona

ChiShona

Sinhala

සිංහල

Slovak

Slovenčina

Slovene

Slovenščina

Somali

Soomaaliga

Southern Sotho

Sesotho

Spanish

Español

Sundanese

Basa Sunda

Swahili

Kiswahili

Swati

SiSwati

Swedish

Svenska

Tamil

தமிழ்

Telugu

తెలుగు

Tajik

Тоҷикӣ

Thai

ภาษาไทย

Tigrinya

ትግርኛ

Tibetan Standard

བོད་སྐད་

Turkmen

Türkmençe

5. Select the **Apply New Language List** button.

ADMIN

GENERALENVIRONMENTUSERSGROUPSSEARCHLANGUAGERISKATTRIBUTESADVANCEDMODELER

Language

Interface Language

English

Content Language

English

Manage Content Languages

Warning

The addition, deletion, or reordering of languages requires a modification on the database. This modification will take an important amount of time to execute and will compromise the usability experience for connected users. It is recommended that these changes be made when there are little or no connected users.

Add New Language:

SpanishEspañol

1	French	Français	x
2	English	English	x
3	Spanish	Español	x

Apply New Language List

5. The following box will appear, click on the “Apply” box to confirm the update on the language list

Confirm Updating Language List

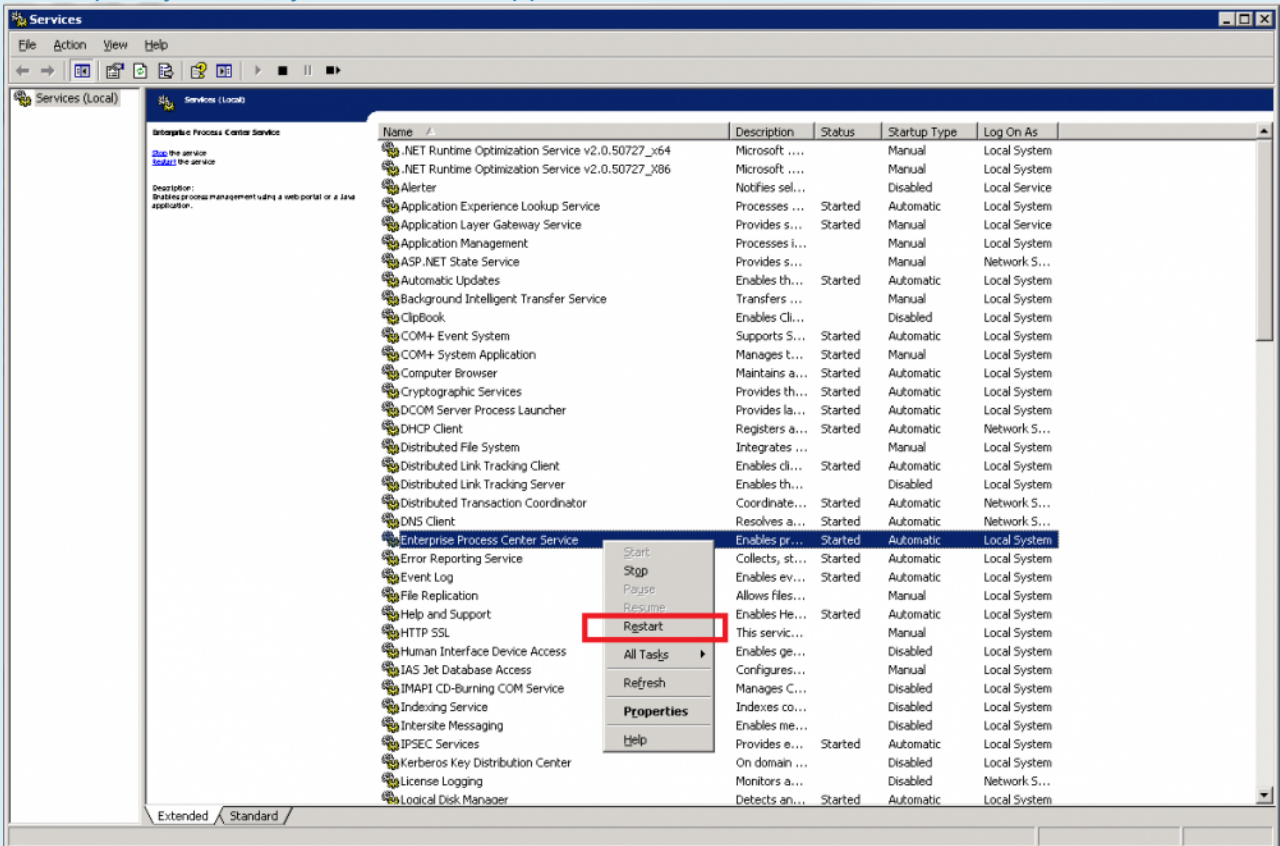
Are you sure you want to update languages??

Cancel

Apply




When changing languages settings, you must also restart the EPC Modeler service. This will require your IT/System Admin support.

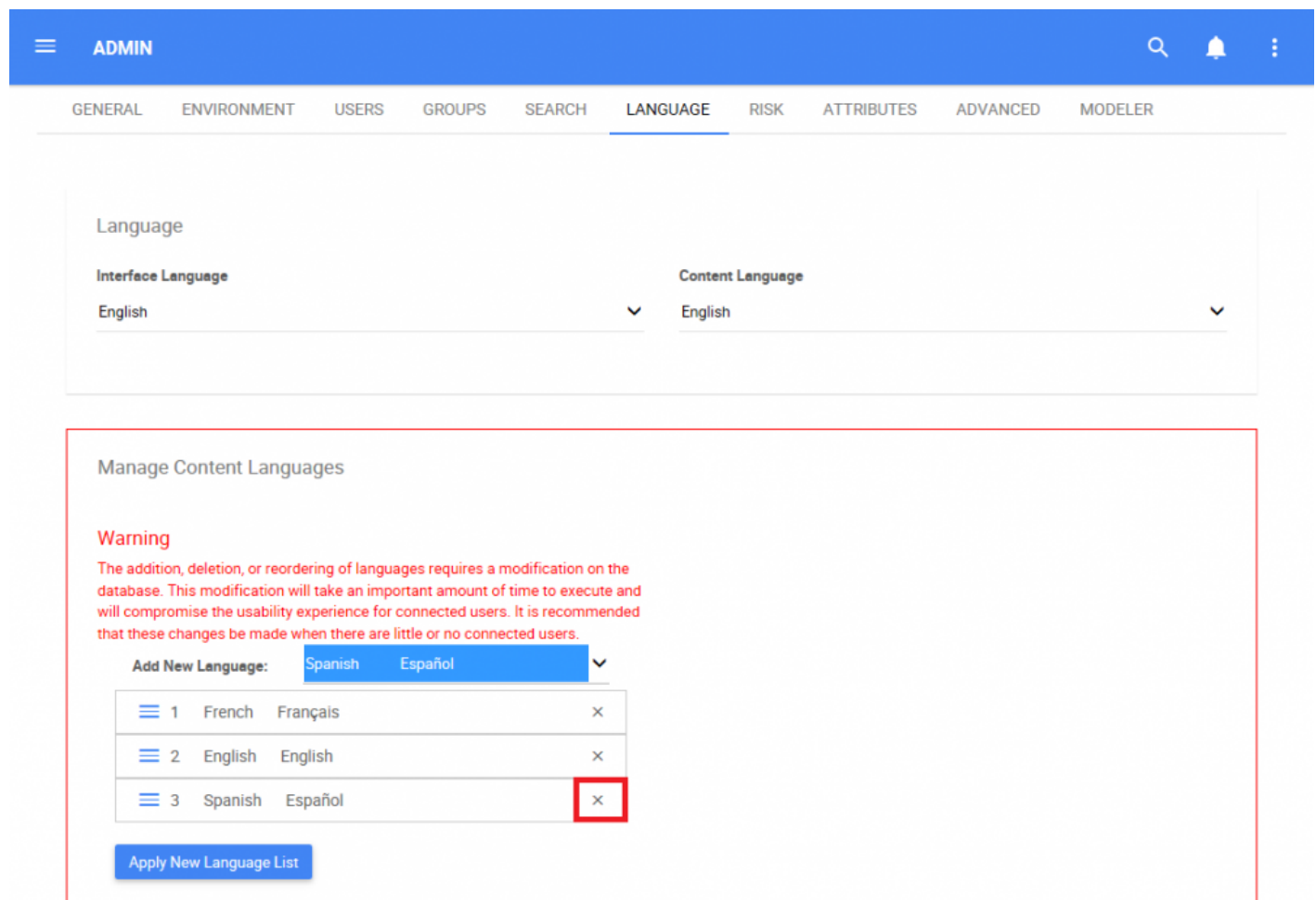


10.6.2.3 Remove Languages

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



ADMIN

GENERAL ENVIRONMENT USERS GROUPS SEARCH **LANGUAGE** RISK ATTRIBUTES ADVANCED MODELER

Language

Interface Language English




Content Language English

Manage Content Languages


Warning

The addition, deletion, or reordering of languages requires a modification on the database. This modification will take an important amount of time to execute and will compromise the usability experience for connected users. It is recommended that these changes be made when there are little or no connected users.

Add New Language: Spanish Español

1	French	Français	
2	English	English	
3	Spanish	Español	

Apply New Language List


4. Select the desired language and select the  button.

10.6.2.4 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

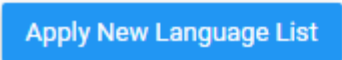
Manage Content Languages

Warning

The addition, deletion, or reordering of languages requires a modification on the database. This modification will take an important amount of time to execute and will compromise the usability experience for connected users. It is recommended that these changes be made when there are little or no connected users.

Add New Language:

	1	English	English	
	2	French	Français	



4. Select the desired language and select the  button.

10.7 Risk

System Administrators are responsible to assign the Risk Priorities to analyze [Risks](#). System Administrators are the ones that assign a name, a color, and a description to each priority allowing users to obtain a full overview of the risk.

System Administrators are responsible to assign the Likelihood and Impact axis for the Risk Matrix with the right Priority, Name and Color.

System Administrators are also responsible to assign the [Risk Profile](#) scores for the Risk Matrix. They edit and customize the likelihood, impact, priority, and score that meets the organization's requirements.

System Admins need to ensure to input accurate priorities and scores so the users in charge to analyze risks are able to effectively manage and mitigate risks.

ADMIN

GENERAL
ENVIRONMENT
USERS
GROUPS
SEARCH
LANGUAGE
RISK
ATTRIBUTES
ADVANCED
MODELER

Editing Language

English

Risk Priority Settings

Too Low

Low

Medium

High

Very High

Risk Matrix Settings

Likelihood

Very Low

Low

Frequent

High

Very High

Very low

Low

Medium

High

Very High

10	21	30	40	50
20	41	65	80	100
30	60	91	120	150
40	80	120	160	201
50	100	150	200	230

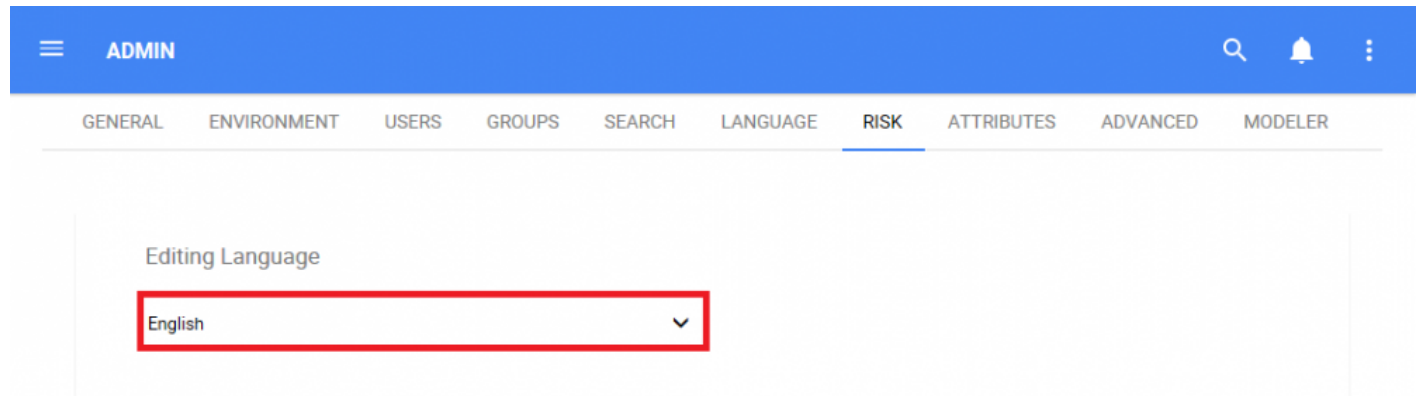
System Admins can:

1. [Edit Risk Language](#)
2. [Edit Risk Priority Settings](#)
3. [Edit Risk Matrix Settings](#)
4. [Edit Risk Profile](#)

10.7.1 Edit Risk Language

System Admins can input Risk Settings in different content languages.

- To view and input Risk information in a different language, navigate to the language box and choose the language you desire to view and edit the content in



The screenshot shows the EPC10 WebApp Admin interface. At the top is a blue header bar with a hamburger menu icon, the word 'ADMIN', a search icon, a bell icon, and a vertical ellipsis icon. Below the header is a horizontal navigation bar with tabs: GENERAL, ENVIRONMENT, USERS, GROUPS, SEARCH, LANGUAGE, RISK (highlighted with a blue underline), ATTRIBUTES, ADVANCED, and MODELER. The main content area is white and contains a section titled 'Editing Language'. Below this title is a dropdown menu with 'English' selected and a downward arrow icon. The dropdown menu is highlighted with a red rectangular border.

* If the System Admin wants to see the content information about risk settings in different languages, he needs to manually input the translation. For example, if the editing languages available are English and French and wants the content available in these two, he needs to manually input the content in both English and French

* When the content is available in more than one language, a language abbreviation in brackets is displayed next to the item (e.g. French as [fr], English as [en], Spanish as [sp], etc.). Refer to the section [Understanding Content Languages](#)

10.7.2 Risk Priority Settings

System Admins are responsible to input the Priority, the Description and the color for the Risk Priorities settings.

Risk Priority Settings are used to analyze both [Risks](#) and [Controls](#). System Admins need to input the right information about Risk Priorities since it enables Users and decision makers to better understand, analyze and mitigate risks and controls

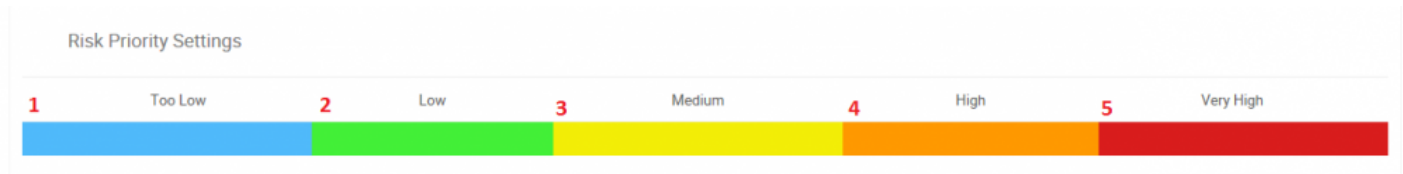
System Administrators can do the following:

1. [Edit the Risk Priority settings](#)
2. [Edit the Risk Priority in a different language](#)

10.7.2.1 Edit Risk Priority

System Administrators are the ones that assign a name, a color, and a description to each priority allowing users to obtain a full overview of the risk.

System Admins are responsible to edit and customize the **five Risk Priority fields**.



To edit the Risk Priority Settings, System Admin can:

1. [Edit Risk Priority Name](#)
2. [Edit Risk Priority Description](#)
3. [Edit Risk Priority Color](#)

10.7.2.1.1 Edit Priority Name

A Name is given by the System Admin to each Risk Priority to label them.

To Edit the Risk Priority Name, please follow the next steps

1. Navigate to the System Admin Section
2. Select the Risk tab under the System Admin section

The screenshot displays the 'ADMIN' section of the EPC10 WebApp. The 'RISK' tab is highlighted with a red box. Below the tabs, the 'Editing Language' dropdown is set to 'English'. The 'Risk Priority Settings' section shows a horizontal bar with five color-coded segments: Too Low (blue), Low (green), Medium (yellow), High (orange), and Very High (red). The 'Risk Matrix Settings' section is visible below the bar.

3. Navigate to the Risk Priority Settings section

ADMIN

GENERALENVIRONMENTUSERSGROUPSSEARCHLANGUAGERISKATTRIBUTESADVANCED

MODELER

Editing Language

English

Risk Priority Settings

Too LowLowMediumHighVery High

4. Select the Priority you want to edit. For this example, the “Too Low” priority is selected

ADMIN

GENERALENVIRONMENTUSERSGROUPSSEARCHLANGUAGERISKATTRIBUTESADVANCED

MODELER

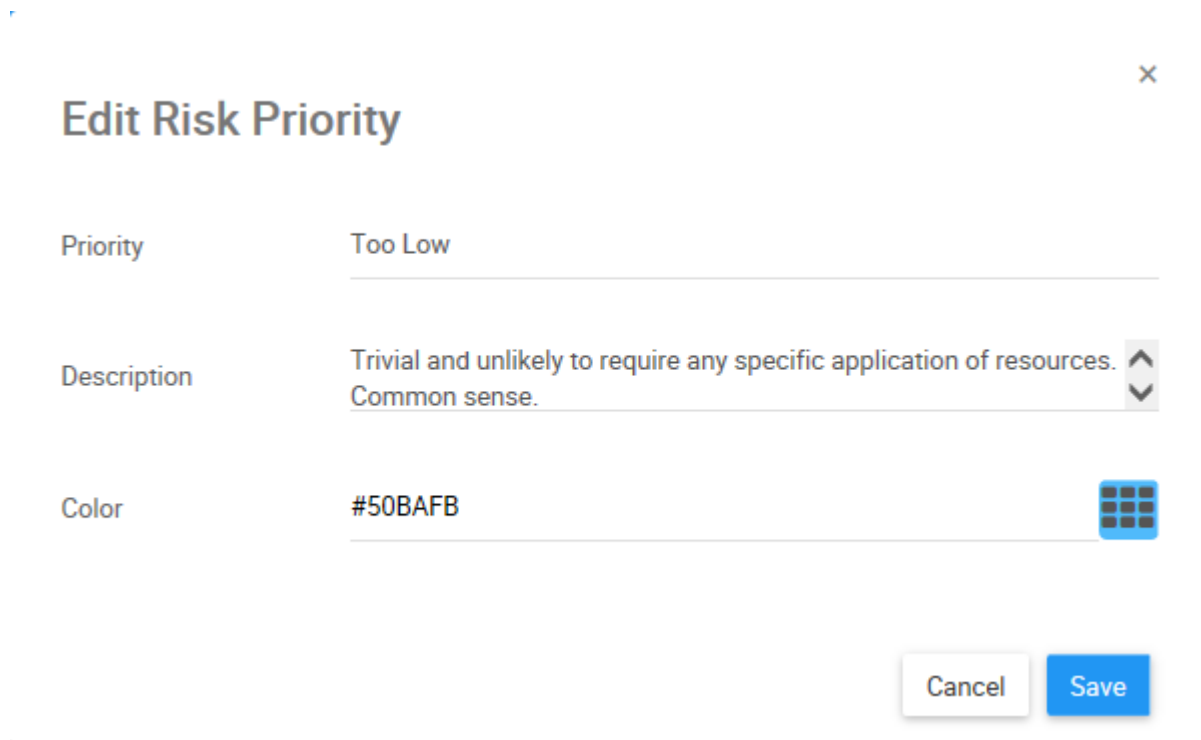
Editing Language

English


Risk Priority Settings

Too LowLowMediumHighVery High

5. This will create a pop-up window allowing System Admins to fill in the appropriate information concerning the Priority.



Edit Risk Priority ×


Priority	Too Low
Description	Trivial and unlikely to require any specific application of resources. Common sense.
Color	#50BAFB 

Cancel Save

6. To edit the **Name** of the Risk Priority, select the Priority text box

×


Edit Risk Priority

Priority	<input type="text" value="Too Low"/>
Description	Trivial and unlikely to require any specific application of resources. Common sense.
Color	#50BAFB 

7. For this example, type “Low Importance”

×




Edit Risk Priority

Priority	<input type="text" value="Low Importance"/>
Description	Trivial and unlikely to require any specific application of resources. Common sense.
Color	#50BAFB 

8. Select the  button to confirm changes



Edit Risk Priority

Priority	Low Importance	
Description	Trivial and unlikely to require any specific application of resources. Common sense.	
Color	#50BAFB	

Cancel

Save



The changes will be reflected on the Risk Priority Settings as well as on the [Risk Matrix Settings](#). The intersection between a likelihood axis and an impact axis on a Risk Matrix gives a level of priority.

10.7.2.1.2 Edit Priority Description

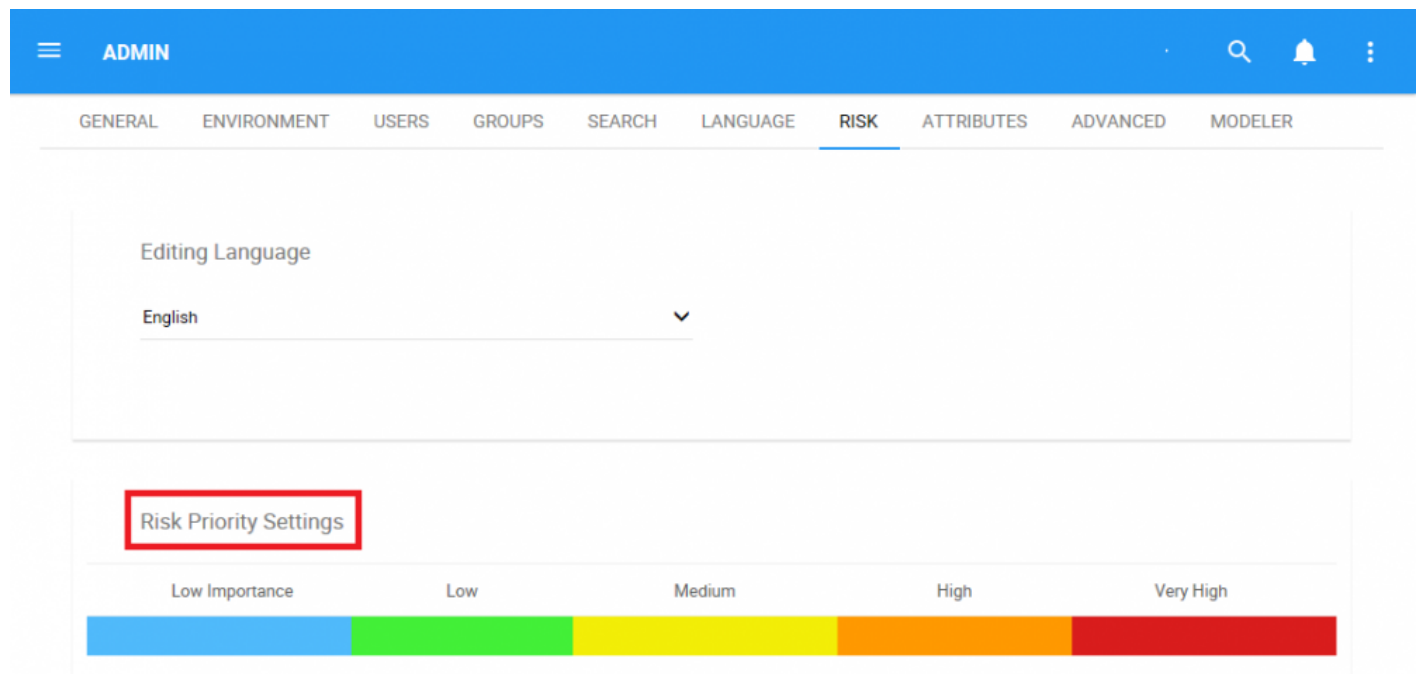
A Description is given by the System Admin to each Risk Priority to explain what their label means. This enable users to better understand the priority.

To Edit the Risk Priority Description, please follow the next steps

1. Navigate to the System Admin Section
2. Select the Risk tab under the System Admin section

The screenshot displays the 'ADMIN' section of the EPC10 WebApp. The top navigation bar is blue with a hamburger menu icon on the left and search, notification, and user icons on the right. Below the header, a horizontal menu contains several tabs: GENERAL, ENVIRONMENT, USERS, GROUPS, SEARCH, LANGUAGE, RISK, ATTRIBUTES, ADVANCED, and MODELER. The 'RISK' tab is highlighted with a red rectangular border. The main content area is divided into two sections. The first section, titled 'Editing Language', features a dropdown menu currently set to 'English'. The second section, titled 'Risk Priority Settings', shows a horizontal bar with five colored segments representing risk levels: 'Low Importance' (blue), 'Low' (green), 'Medium' (yellow), 'High' (orange), and 'Very High' (red).

3. Navigate to the Risk Priority Settings section



ADMIN

GENERAL ENVIRONMENT USERS GROUPS SEARCH LANGUAGE **RISK** ATTRIBUTES ADVANCED MODELER

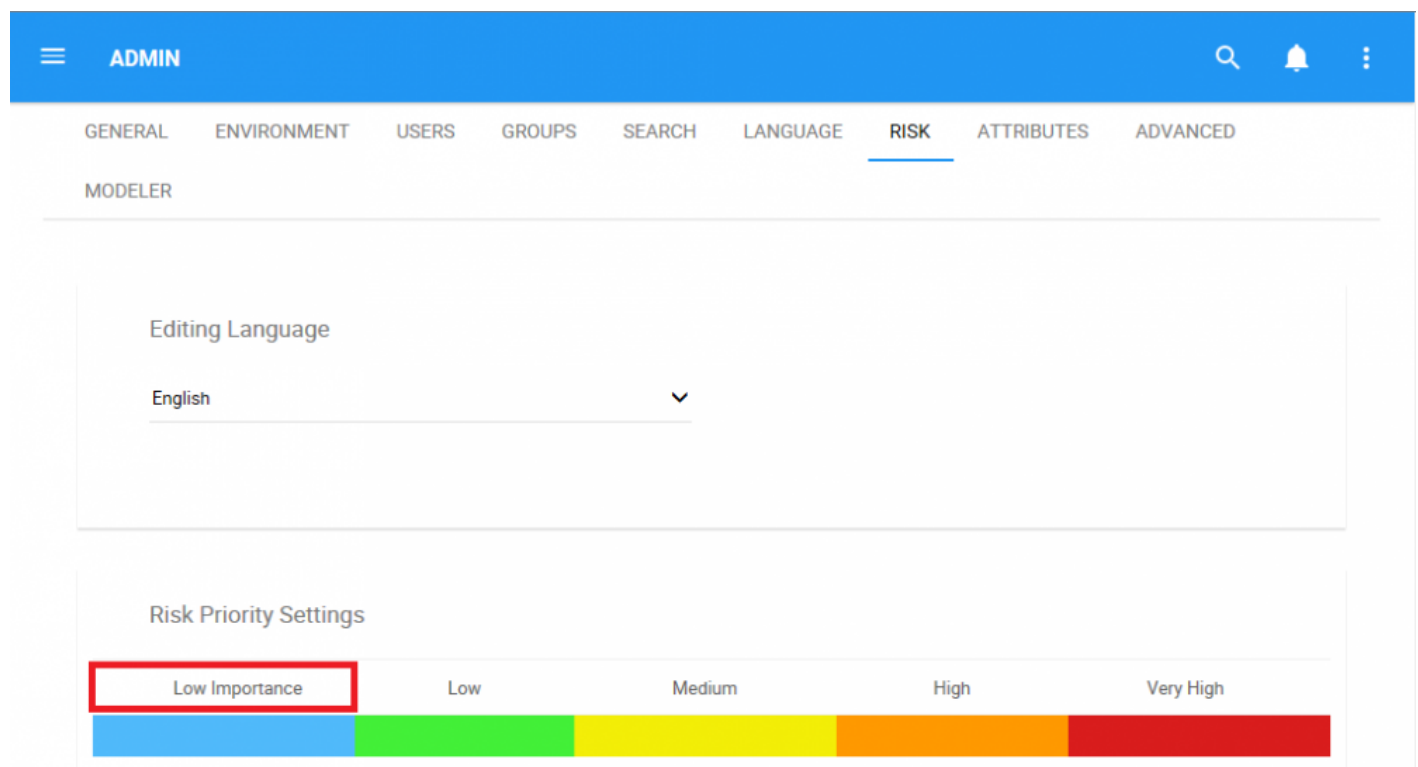
Editing Language

English

Risk Priority Settings

Low Importance Low Medium High Very High

4. Select the Priority you want to edit. For this example, the “Low Importance” priority is selected



ADMIN

GENERAL ENVIRONMENT USERS GROUPS SEARCH LANGUAGE **RISK** ATTRIBUTES ADVANCED MODELER

Editing Language

English

Risk Priority Settings

Low Importance Low Medium High Very High

5. This will create a pop-up window allowing System Admins to fill in the appropriate information concerning the Priority.

×

Edit Risk Priority

Priority	Low Importance
Description	Trivial and unlikely to require any specific application of resources. Common sense.
Color	#50BAFB

Cancel Save

6. To edit the **Description** of the Risk Priority, select the Description text box

×

Edit Risk Priority

Priority	Low Importance
Description	Trivial and unlikely to require any specific application of resources. Common sense.
Color	#50BAFB

Cancel Save


7. For this example, type the edited description “Unlikely to require many resources and time”

×

Edit Risk Priority

Priority

Description

Color 


8. Select the button to confirm changes

×

Edit Risk Priority

Priority

Description

Color 



The changes will be reflected on the Risk Priority Settings as well as on the [Risk Matrix Settings](#). The intersection between a likelihood axis and an impact axis on a Risk Matrix gives a level of priority.

10.7.2.1.3 Edit Risk Priority Color

A Color is given by the System Admin to each Risk Priority to distinguish each priority from each other. This enable users to get a better view of each priority/

To Edit the Color of the Risk Priority, please follow the next steps

1. Navigate to the System Admin Section
2. Select the Risk tab under the System Admin section

The screenshot displays the EPC10 WebApp Admin interface. At the top, there is a blue header bar with a hamburger menu icon, the word "ADMIN", a search icon, a bell icon, and a vertical ellipsis icon. Below the header, a horizontal navigation bar contains several tabs: "GENERAL", "ENVIRONMENT", "USERS", "GROUPS", "SEARCH", "LANGUAGE", "RISK", "ATTRIBUTES", and "ADVANCED". The "RISK" tab is highlighted with a red rectangular border. Below this navigation bar, the main content area is titled "MODELER". It contains two sections: "Editing Language" with a dropdown menu currently set to "English", and "Risk Priority Settings". The "Risk Priority Settings" section features a horizontal bar with five colored segments representing different risk levels: "Low Importance" (blue), "Low" (green), "Medium" (yellow), "High" (orange), and "Very High" (red).

3. Navigate to the Risk Priority Settings section

ADMIN

GENERALENVIRONMENTUSERSGROUPSSEARCHLANGUAGERISKATTRIBUTESADVANCED

MODELER

Editing Language

English

Risk Priority Settings

Low ImportanceLowMediumHighVery High

4. Select the Priority you want to edit. For this example, the “Low Importance” priority is selected

ADMIN

GENERALENVIRONMENTUSERSGROUPSSEARCHLANGUAGERISKATTRIBUTESADVANCED

MODELER

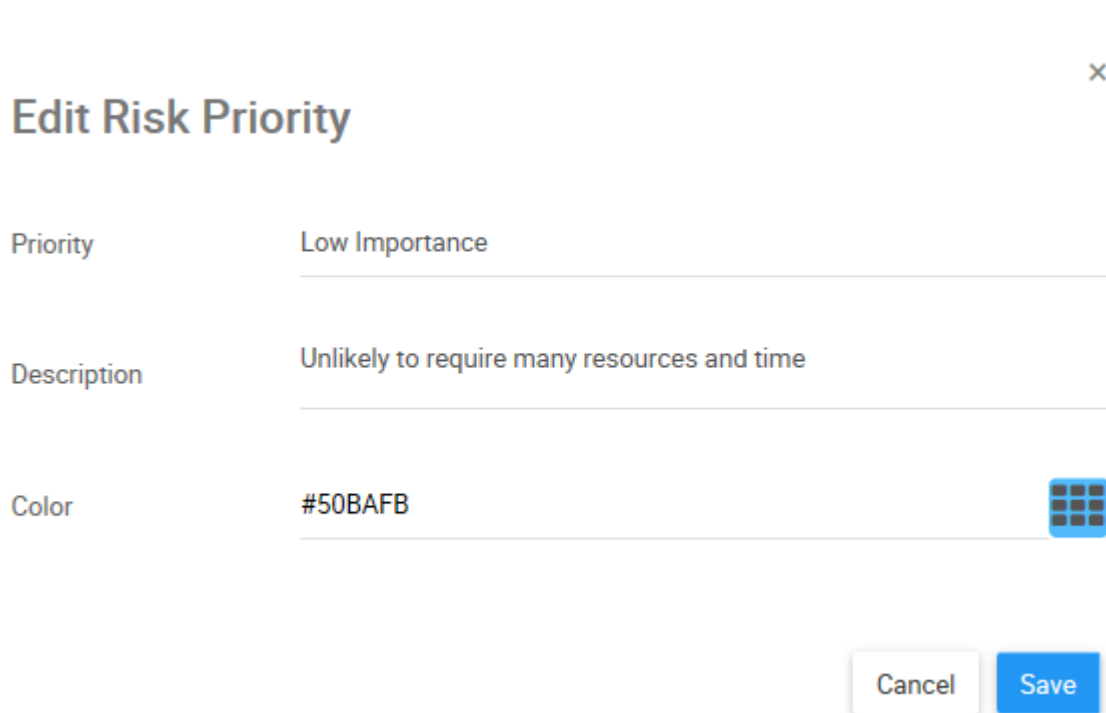
Editing Language

English

Risk Priority Settings

Low ImportanceLowMediumHighVery High

5. This will create a pop-up window allowing System Admins to fill in the appropriate information concerning the Priority.




Edit Risk Priority

Priority Low Importance

Description Unlikely to require many resources and time


Color #50BAFB

Cancel Save

6. To edit the **Color** of the Risk Priority, select the  icon

×

Edit Risk Priority


Priority	Low Importance
Description	Unlikely to require many resources and time
Color	#50BAFB 


Cancel Save

7. This will generate a drop-down menu featuring a color select window

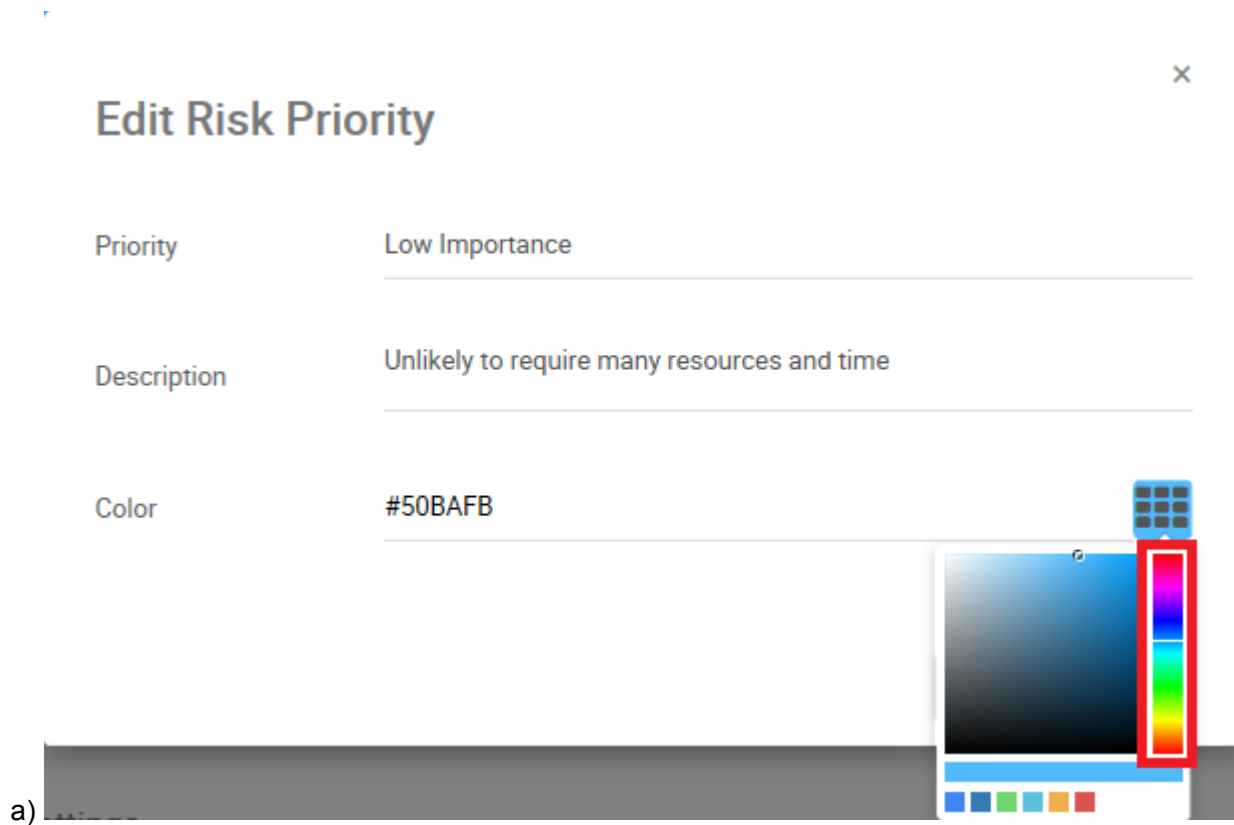
×

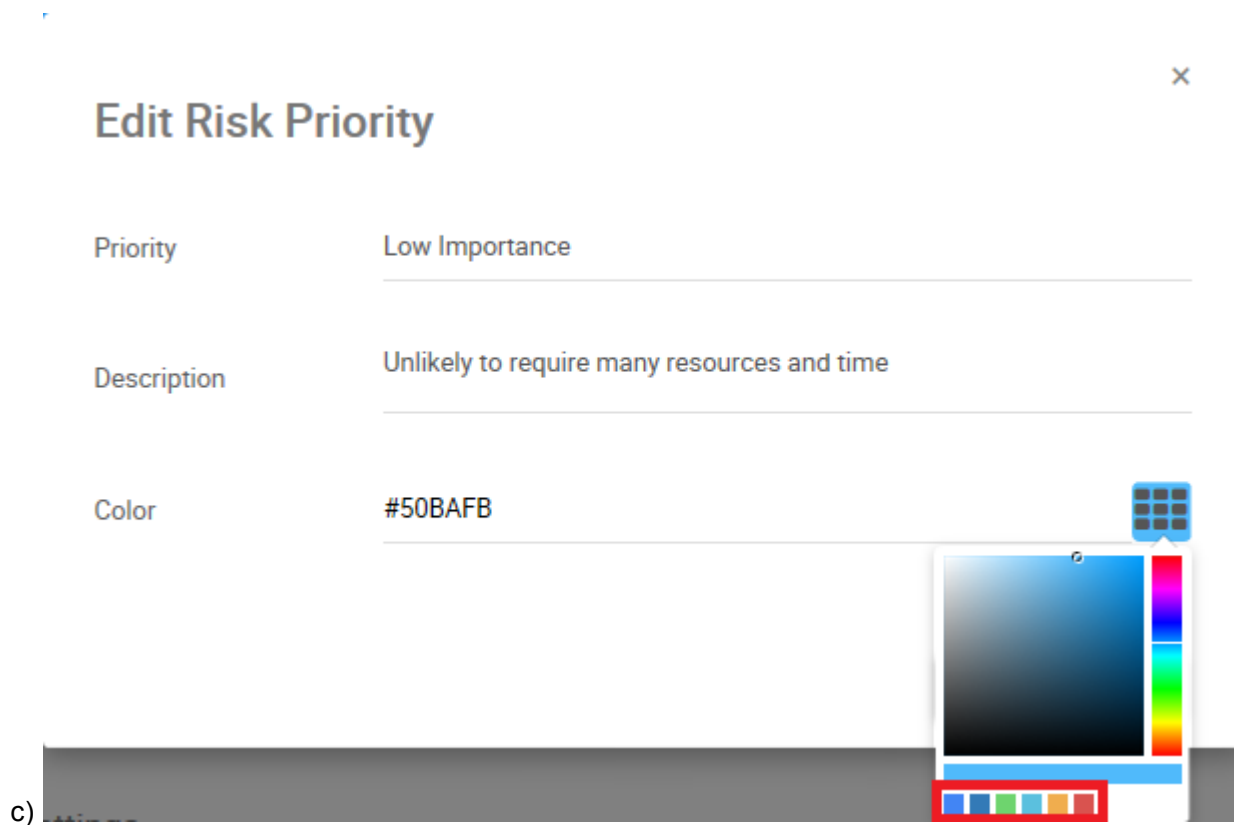
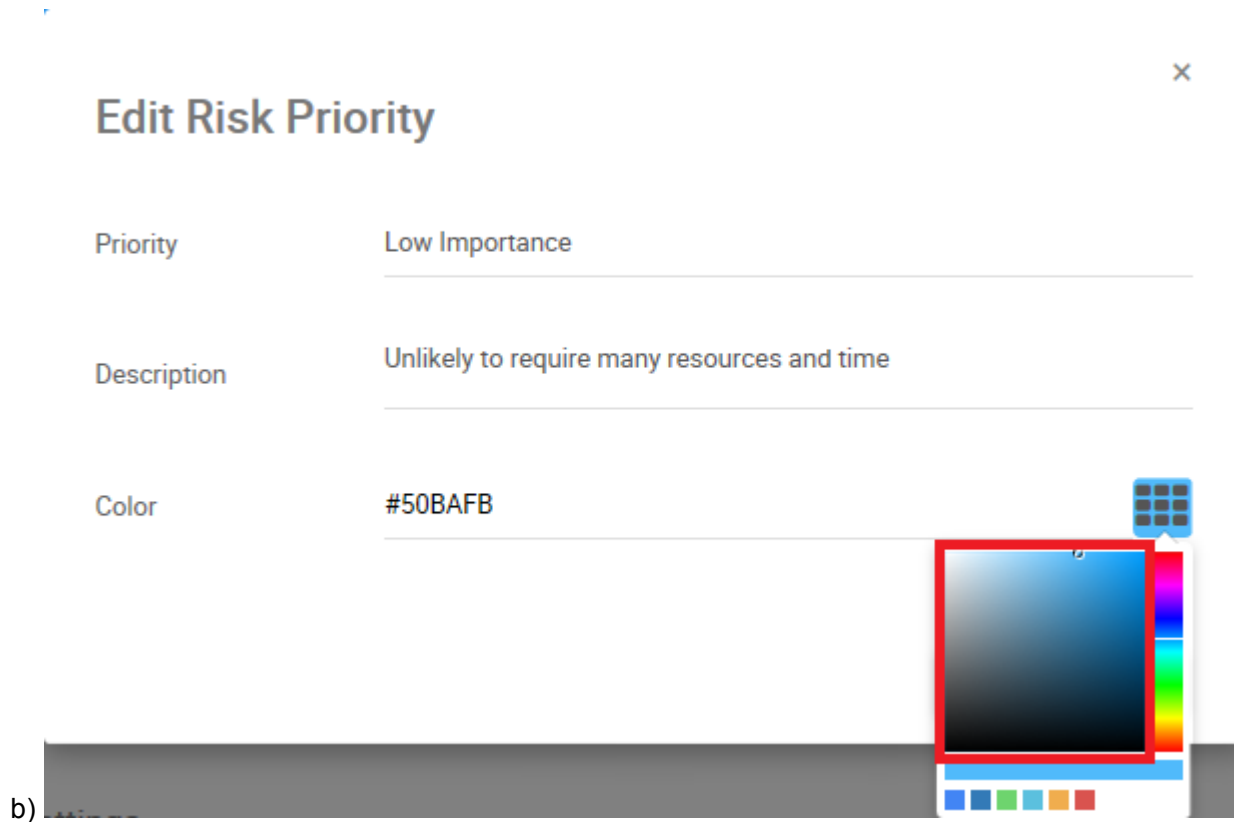
Edit Risk Priority

Priority	Low Importance
Description	Unlikely to require many resources and time
Color	#50BAFB 

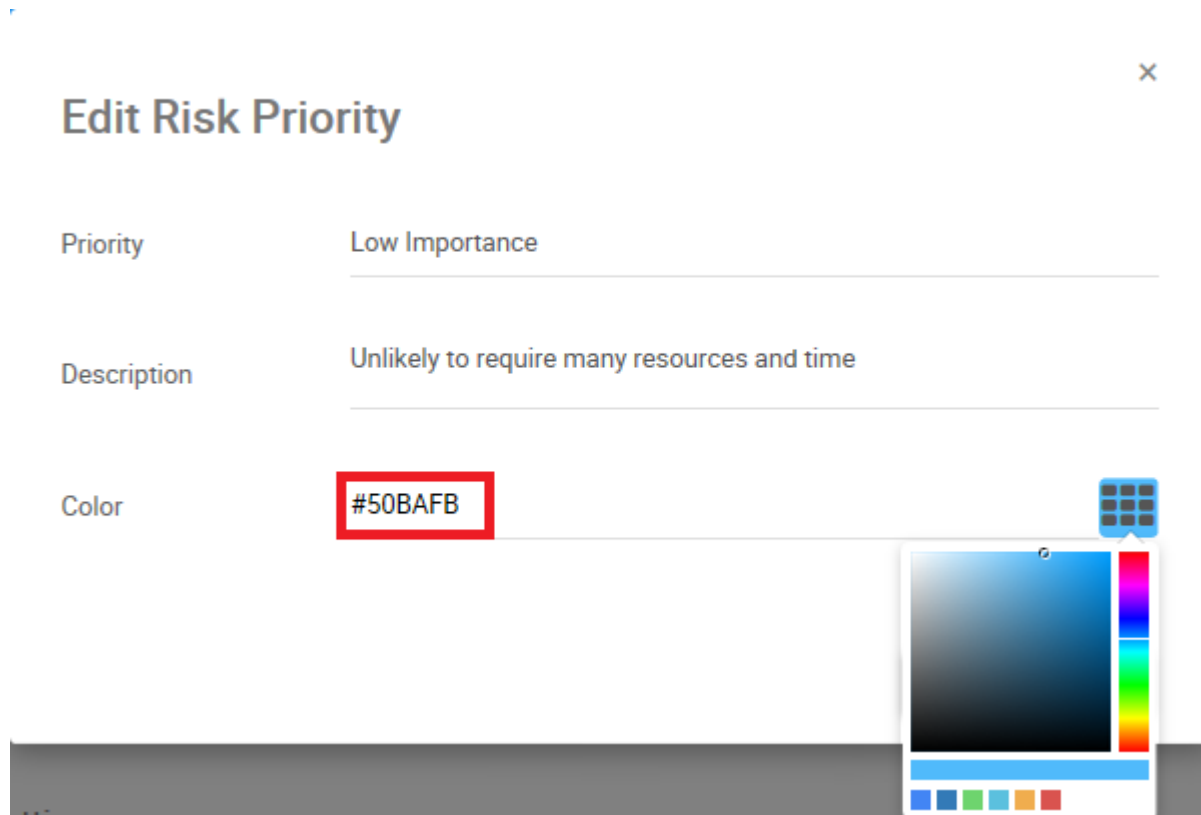


8. System Admin can select between the color bar a), shade b) and from c) preset colors by clicking on their desired selection





9. Select to color you desire. It will enter a new alphanumeric code in the text box.




The screenshot shows a web application window titled "Edit Risk Priority" with a close button (X) in the top right corner. The form contains three fields: "Priority" with the value "Low Importance", "Description" with the value "Unlikely to require many resources and time", and "Color" with the value "#50BAFB". The "Color" field is highlighted with a red border. To the right of the "Color" field is a color selection tool, which includes a small grid icon and a larger color picker interface. The color picker shows a gradient of colors, with a blue color selected. Below the color picker is a row of five small colored squares: blue, green, yellow, orange, and red.

8. Select the  button to confirm changes

Edit Risk Priority



Priority	Low Importance
Description	Unlikely to require many resources and time
Color	#50bafb 

CancelSave

The changes will be reflected on the Risk Priority Settings as well as on the [Risk Matrix Settings](#). The intersection between a likelihood axis and an impact axis on a Risk Matrix gives a level of priority. When the color change was made on the priority, it then changed on the Risk Matrix priorities as well

10.7.2.2 Edit Risk Priority Language

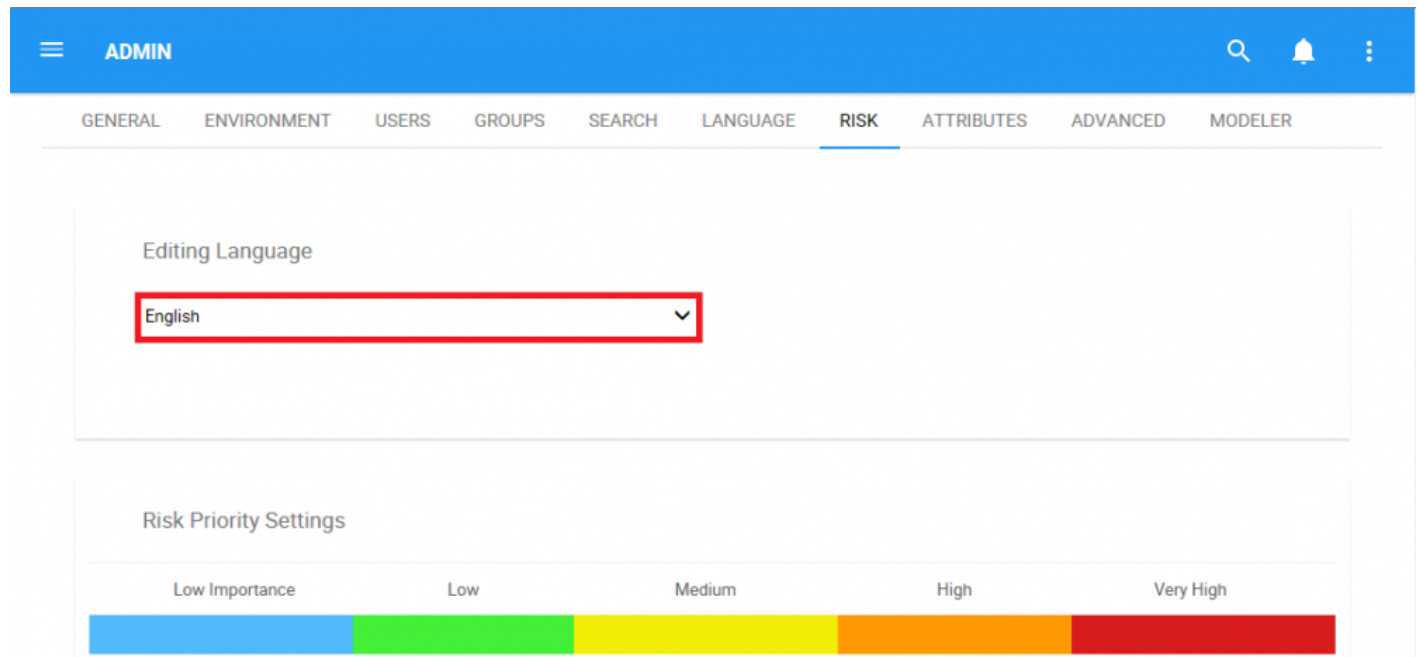
System Admins can input Risk Settings in different content languages. If the System Admin wants to see the content information about risk settings in different languages, he needs to manually input the translation. For example, if the editing languages available are English and French and wants the content available in these two, he needs to manually input the content in both English and French

To Edit the Risk Priority Settings in a different language, follow the next steps

1. Navigate to the System Admin Section
2. Select the Risk tab under the System Admin section

The screenshot displays the EPC10 WebApp Admin interface. At the top, there is a blue header bar with a hamburger menu icon, the word "ADMIN", a search icon, a bell icon, and a vertical ellipsis icon. Below the header is a horizontal navigation bar with tabs: GENERAL, ENVIRONMENT, USERS, GROUPS, SEARCH, LANGUAGE, RISK, ATTRIBUTES, ADVANCED, and MODELER. The "RISK" tab is highlighted with a red rectangular box. Below the navigation bar, the main content area is divided into two sections. The first section is titled "Editing Language" and contains a dropdown menu with "English" selected and a downward arrow. The second section is titled "Risk Priority Settings" and contains a horizontal bar with five colored segments: blue (labeled "Low Importance"), green (labeled "Low"), yellow (labeled "Medium"), orange (labeled "High"), and red (labeled "Very High").

3. Navigate to the Editing Language section and select the "English" box



ADMIN

GENERAL ENVIRONMENT USERS GROUPS SEARCH LANGUAGE **RISK** ATTRIBUTES ADVANCED MODELER

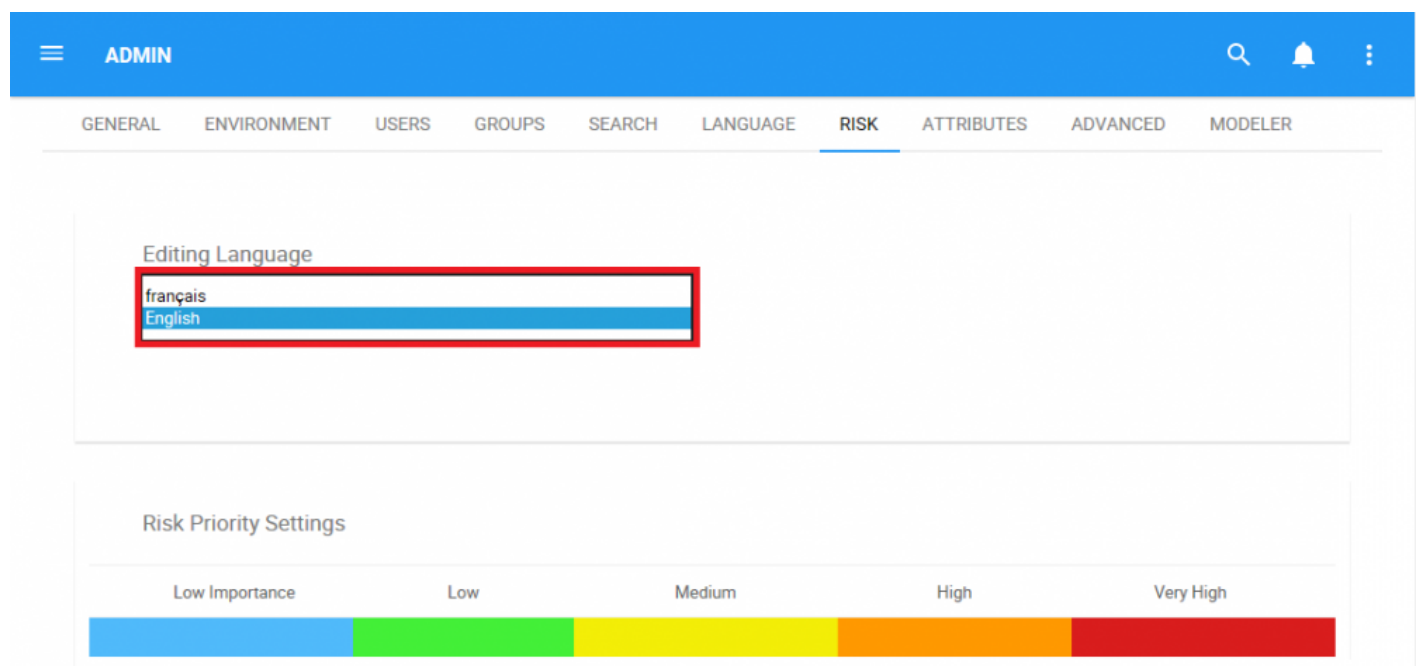
Editing Language

English

Risk Priority Settings

Low Importance Low Medium High Very High

- This will generate a drop-down menu featuring the languages you are allowed to use and create content for



ADMIN

GENERAL ENVIRONMENT USERS GROUPS SEARCH LANGUAGE **RISK** ATTRIBUTES ADVANCED MODELER

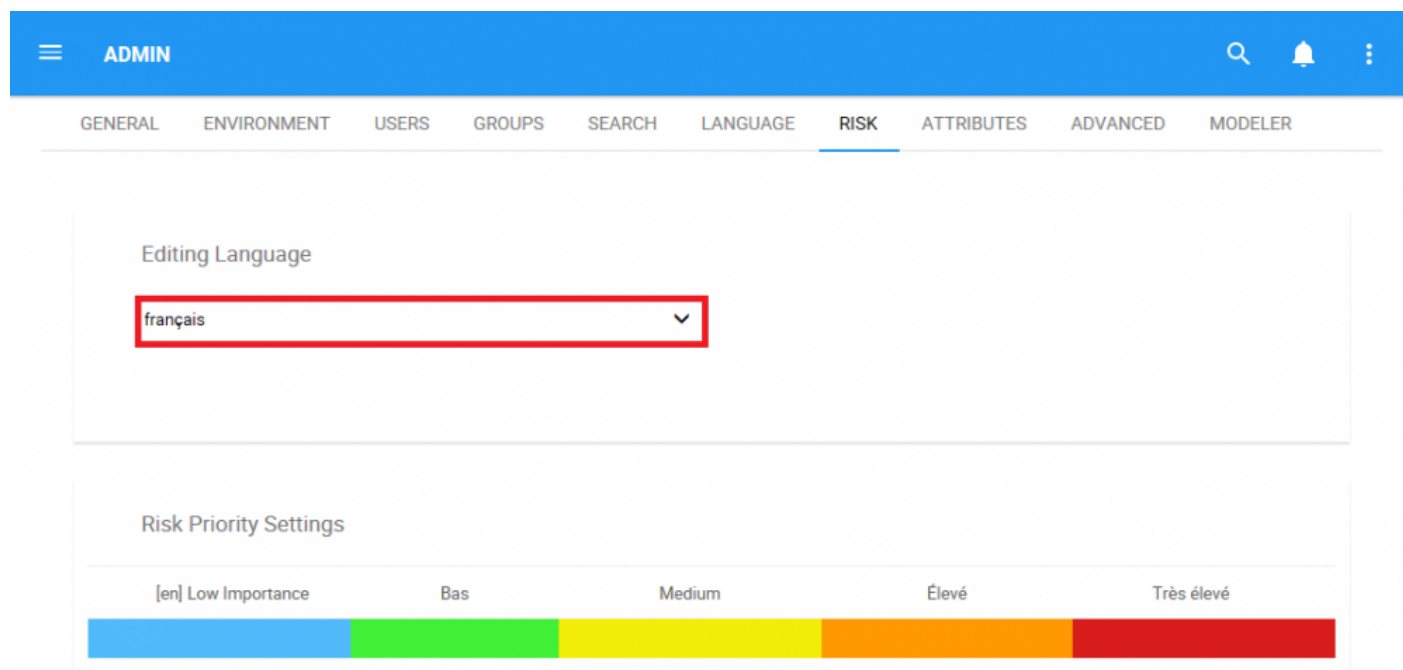
Editing Language

français
English

Risk Priority Settings

Low Importance Low Medium High Very High

- Select the language you want to create Risk Priority content for. For this example, French is chosen.



ADMIN

GENERAL ENVIRONMENT USERS GROUPS SEARCH LANGUAGE **RISK** ATTRIBUTES ADVANCED MODELER

Editing Language

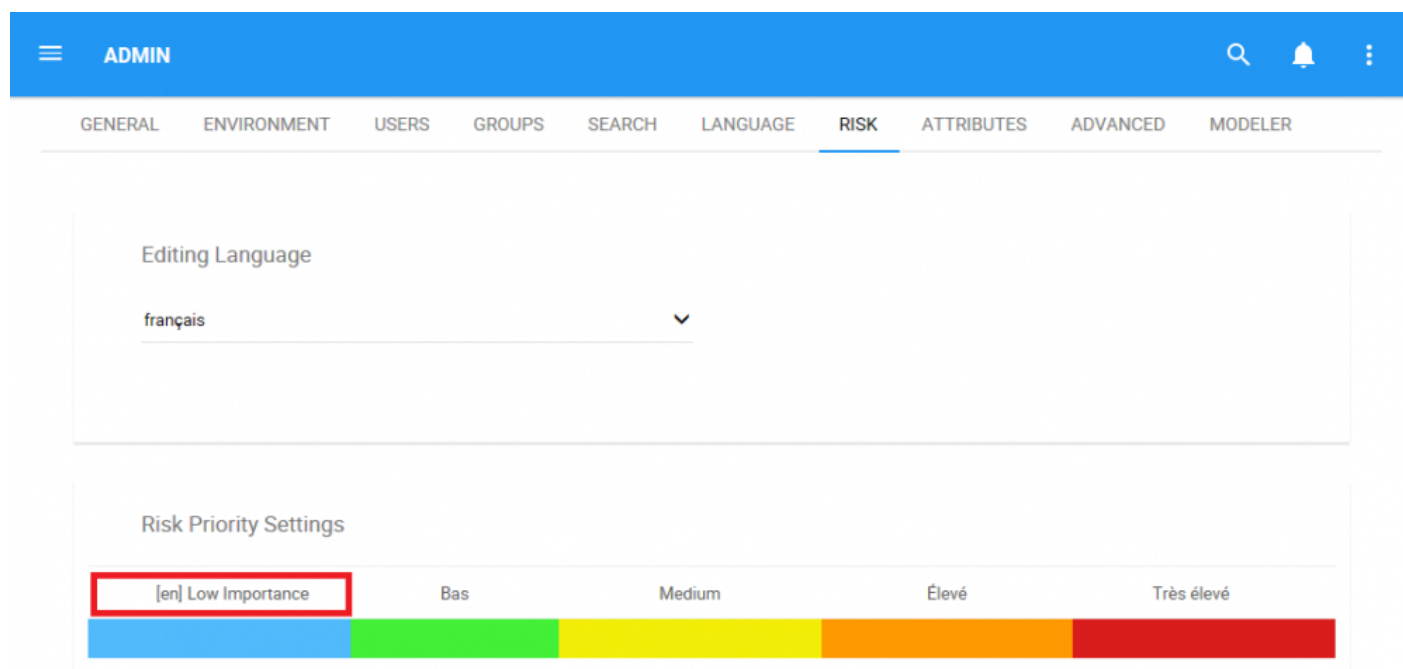
français

Risk Priority Settings

[en] Low Importance Bas Medium Élevé Très élevé

6. Navigate to the Risk Priority Settings section, and click on the Priority you want to edit. For this example, select “[en] Low Importance”

✿ When the content is available in another language, the language abbreviation in brackets will be displayed. Refer to the section [Understanding Content Languages](#)



ADMIN

GENERAL ENVIRONMENT USERS GROUPS SEARCH LANGUAGE **RISK** ATTRIBUTES ADVANCED MODELER

Editing Language

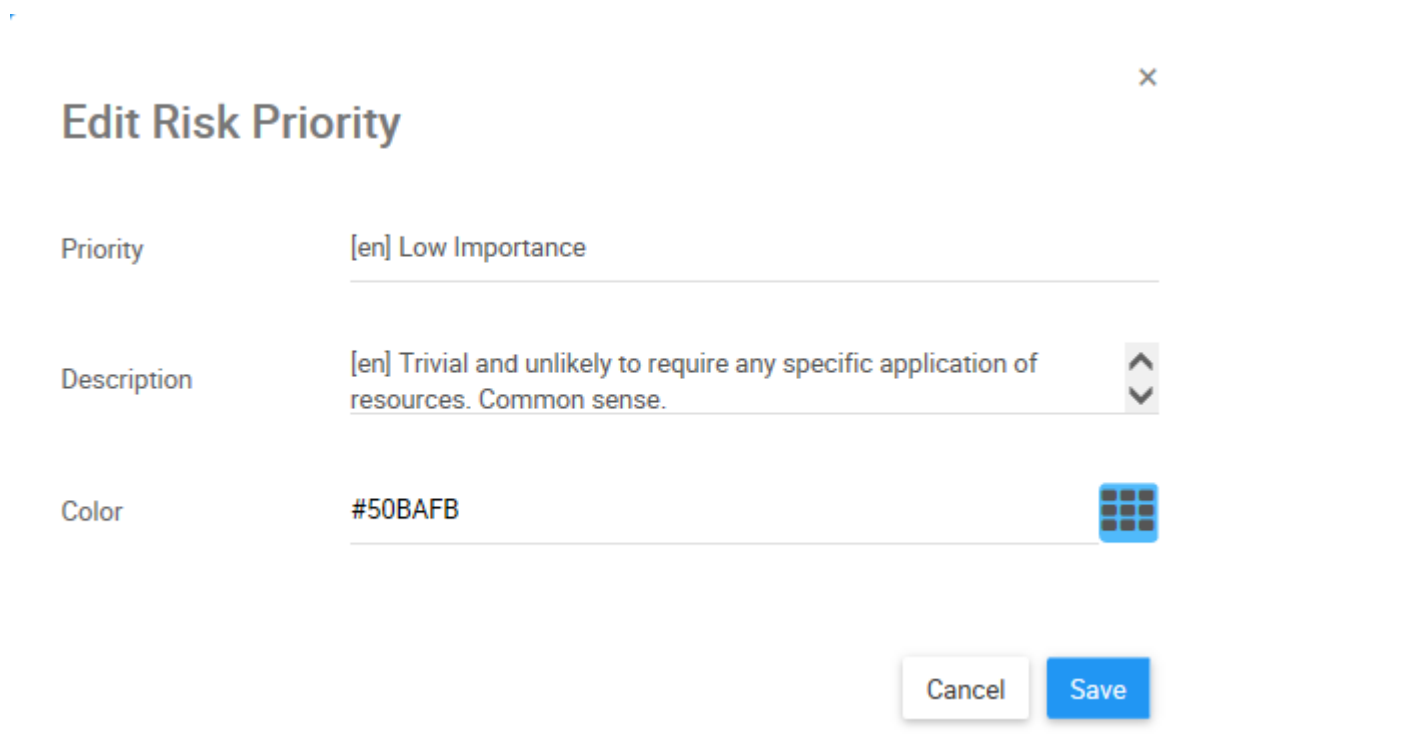
français

Risk Priority Settings

[en] Low Importance Bas Medium Élevé Très élevé

- This will create a pop-up window with the current English Priority Name, English Description and Color.

* When the content is available in another language, the language abbreviation in brackets will be displayed. Refer to the section [Understanding Content Languages](#)



Edit Risk Priority

Priority

Description

Color

- Input the content translated in French in the Priority box and the Description box. To edit, refer to [Edit Priority Name](#) and [Edit Priority Description](#)

×

Edit Risk Priority

Priority	<input type="text" value="Très Bas"/>
Description	<input type="text" value="Trivial et peu susceptible de nécessiter une application spécifique des ressources. Sens commun."/> <div>⬆</div> <div>⬇</div>
Color	<input type="text" value="#50BAFB"/> <div>⬆</div> <div>⬇</div>

9. Select the box to confirm changes

×

Edit Risk Priority

Priority	<input type="text" value="Très Bas"/>
Description	<input type="text" value="Trivial et peu susceptible de nécessiter une application spécifique des ressources. Sens commun."/> <div>⬆</div> <div>⬇</div>
Color	<input type="text" value="#50BAFB"/> <div>⬆</div> <div>⬇</div>

10.7.3 Risk Matrix Settings

System Admins are responsible to input the Risk Likelihood, the Risk Impact and the Risk Profile under the Risk Matrix Settings.

The System Admin needs to input the information about the Risk Likelihood axis and the Risk Impact axis so the Risk Matrix can be efficiently used in the [Risk](#) and [Control](#) Modules by EPC users. Inputting the right information for the Impact and Likelihood graph and matrix enables users analyze accurate information about the organization's risks and controls.

The Risk Matrix is viewed by EPC users on the Details Tab, under the [Risk Profile](#) attribute for any Risk. To accurately analyze and understand Risks and controls, it is important to input the right Risk Profile priorities and scores.

System Administrators can do the following:

1. [Edit the Risk Matrix settings](#)
2. [Edit the Risk Matrix in a different language](#)

10.7.3.1 Edit Risk Matrix

System Administrators are the ones that assign a name and description for each Risk Likelihood and Risk Impact axis on the Risk Matrix. System Admins are responsible to edit and customize the five Risk Likelihood axis and the five Risk Impact axis

		Likelihood				
		1 Very Low	2 Low	3 Frequent	4 High	5 Very High
Impact	1 Very low	10	21	30	40	50
	2 Low	20	41	65	80	100
	3 Medium	30	60	91	120	150
	4 High	40	80	120	160	201
	5 Very High	50	100	150	200	250

System Administrators are also responsible to edit and customize the Risk Profile by assigning a Risk Priority and Risk score on the Risk Matrix. The Risk Profile is the intersection between a Risk Likelihood and a Risk Impact.

		Likelihood				
		Very Low	Low	Frequent	High	Very High
Impact	Very low	10	21	30	40	50
	Low	20	41	65	80	100
	Medium	30	60	91	120	150
	High	40	80	120	160	201
	Very High	50	100	150	200	250

To edit the Risk Priority Settings, System Admin can:

1. [Edit Risk Likelihood](#)
2. [Edit Risk Impact](#)
3. [Edit Risk Profile](#)

10.7.3.1.1 Edit Risk Likelihood

System Admins are responsible of giving the appropriate name and description to each Risk Likelihood.

System Admins can:

1. [Edit Risk Likelihood Name](#)
2. [Edit Risk Likelihood Description](#)

10.7.3.1.1 Edit Risk Likelihood Name

A Name is given by the System Admin to each Risk Likelihood to label them.

To Edit the Risk Likelihood Name, please follow the next steps

1. Navigate to the System Admin Section
2. Select the Risk tab under the System Admin section

ADMIN

GENERAL
ENVIRONMENT
USERS
GROUPS
SEARCH
LANGUAGE
RISK
ATTRIBUTES
ADVANCED
MODELER

Editing Language

English

Risk Priority Settings

Low Importance

Low

Medium

High

Very High

Risk Matrix Settings

Likelihood

Very Low

Low

Frequent

High

Very High

Impact

Very low

Low

Medium

High

Very High

Very low	10	21	30	40	50
Low	20	41	65	80	100
Medium	30	60	91	120	150
High	40	80	120	160	201
Very High	50	100	150	200	250

3. Navigate to the Risk Matrix Settings section

ADMIN

GENERAL

ENVIRONMENT

USERS

GROUPS

SEARCH

LANGUAGE

RISK

ATTRIBUTES

ADVANCED

MODELER

Editing Language

English

Risk Priority Settings

Low Importance

Low

Medium

High

Very High

Risk Matrix Settings

Likelihood

Very Low

Low

Frequent

High

Very High

Impact

Very low

Low

Medium

High

Very High

Very low	10	21	30	40	50
Low	20	41	65	80	100
Medium	30	60	91	120	150
High	40	80	120	160	201
Very High	50	100	150	200	250

4. Select the Risk Likelihood you want to edit. For this example, the “Very Low” Likelihood is selected

Risk Matrix Settings						
		Likelihood				
		Very Low	Low	Frequent	High	Very High
Impact	Very low	10	21	30	40	50
	Low	20	41	65	80	100
	Medium	30	60	91	120	150
	High	40	80	120	160	201
	Very High	50	100	150	200	250

5. This will create a pop-up window allowing System Admins to fill in the appropriate information concerning the Risk Likelihood

×

Edit Risk Likelihood

Likelihood

Very Low

Description

Remote. Not much chance that this would happen.

Cancel

Save

6. To edit the **Name** of the Risk Likelihood, select the Likelihood text box

×

Edit Risk Likelihood

Likelihood

Description

7. For this example, type the “Not Likely”

×

Edit Risk Likelihood

Likelihood

Description

8. Select the button to confirm changes

×

Edit Risk Likelihood

Likelihood	Not Likely	×
Description	Remote. Not much chance that this would happen.	

Cancel

Save

10.7.3.1.1.2 Edit Risk Likelihood Description

A Description is given by the System Admin to each Risk Likelihood to explain what their label means. This enable users to better understand the Risk Likelihood.

To Edit the Risk Likelihood Description, please follow the next steps

1. Navigate to the System Admin Section
2. Select the Risk tab under the System Admin section

ADMIN

GENERAL

ENVIRONMENT

USERS

GROUPS

SEARCH

LANGUAGE

RISK

ATTRIBUTES

ADVANCED

MODELER

Editing Language

English

Risk Priority Settings

Low Importance

Low

Medium

High

Very High

Risk Matrix Settings

Likelihood

Very Low

Low

Frequent

High

Very High

Impact

Very low

Low

Medium

High

Very High

Very low	10	21	30	40	50
Low	20	41	65	80	100
Medium	30	60	91	120	150
High	40	80	120	160	201
Very High	50	100	150	200	250

3. Navigate to the Risk Matrix Settings section

ADMIN

GENERAL

ENVIRONMENT

USERS

GROUPS

SEARCH

LANGUAGE

RISK

ATTRIBUTES

ADVANCED

MODELER

Editing Language

English

Risk Priority Settings

Low Importance

Low

Medium

High

Very High

Risk Matrix Settings

Likelihood

Very Low

Low

Frequent

High

Very High

Impact

Very low

Low

Medium

High

Very High

Very low	10	21	30	40	50
Low	20	41	65	80	100
Medium	30	60	91	120	150
High	40	80	120	160	201
Very High	50	100	150	200	250

4. Select the Risk Likelihood you want to edit. For this example, the “Very Low” Likelihood is selected

Risk Matrix Settings						
		Likelihood				
		Very Low	Low	Frequent	High	Very High
Impact	Very low	10	21	30	40	50
	Low	20	41	65	80	100
	Medium	30	60	91	120	150
	High	40	80	120	160	201
	Very High	50	100	150	200	250

5. This will create a pop-up window allowing System Admins to fill in the appropriate information concerning the Risk Likelihood

×

Edit Risk Likelihood

Likelihood

Very Low

Description

Remote. Not much chance that this would happen.

Cancel

Save

6. To edit the **Description** of the Risk Likelihood, select the Description text box

×

Edit Risk Likelihood

Likelihood	Very Low
Description	Remote. Not much chance that this would happen.

CancelSave

7. For this example, type the edited description “Low probability this would happen”

×

Edit Risk Likelihood

Likelihood	Very Low
Description	Low probability this would happen

CancelSave

8. Select the  button to confirm changes

×

Edit Risk Likelihood

Likelihood	Very Low
Description	Low probability this would happen

×

Cancel Save

10.7.3.1.2 Edit Risk Impact

System Admins are responsible of giving the appropriate name and description to each Risk Impact

System Admins can:

1. [Edit Risk Impact Name](#)
2. [Edit Risk Impact Description](#)

10.7.3.1.2.1 Edit Risk Impact Name

A Name is given by the System Admin to each Risk Impact to label them.

To Edit the Risk Impact Name, please follow the next steps

1. Navigate to the System Admin Section
2. Select the Risk tab under the System Admin section

ADMIN

GENERAL
ENVIRONMENT
USERS
GROUPS
SEARCH
LANGUAGE
RISK
ATTRIBUTES
ADVANCED
MODELER

Editing Language

English

Risk Priority Settings

Low Importance	Low	Medium	High	Very High

Risk Matrix Settings

		Likelihood				
		Very Low	Low	Frequent	High	Very High
Impact	Very low	10	21	30	40	50
	Low	20	41	65	80	100
	Medium	30	60	91	120	150
	High	40	80	120	160	201
	Very High	50	100	150	200	250

3. Navigate to the Risk Matrix Settings section

ADMIN

GENERAL
ENVIRONMENT
USERS
GROUPS
SEARCH
LANGUAGE
RISK
ATTRIBUTES
ADVANCED
MODELER

Editing Language

English

Risk Priority Settings

Low Importance

Low

Medium

High

Very High

Risk Matrix Settings

Likelihood

	Very Low	Low	Frequent	High	Very High
Very low	10	21	30	40	50
Low	20	41	65	80	100
Medium	30	60	91	120	150
High	40	80	120	160	201
Very High	50	100	150	200	250

4. Select the Risk Impact you want to edit. For this example, the “Very Low” Impact is selected

		Likelihood				
		Very Low	Low	Frequent	High	Very High
Impact	Very low	10	21	30	40	50
	Low	20	41	65	80	100
	Medium	30	60	91	120	150
	High	40	80	120	160	201
	Very High	50	100	150	200	250

5. This will create a pop-up window allowing System Admins to fill in the appropriate information concerning the Risk Impact

×

Edit Risk Impact

Impact

Description

6. To edit the **Name** of the Risk Impact, select the Impact text box

✕

Edit Risk Impact

Impact

Very low

Description

Minor or insignificant. Minimum impact internally only.

Cancel

Save

7. For this example, type the “Not Likely”

✕

Edit Risk Impact

Impact

Not Likely

✕

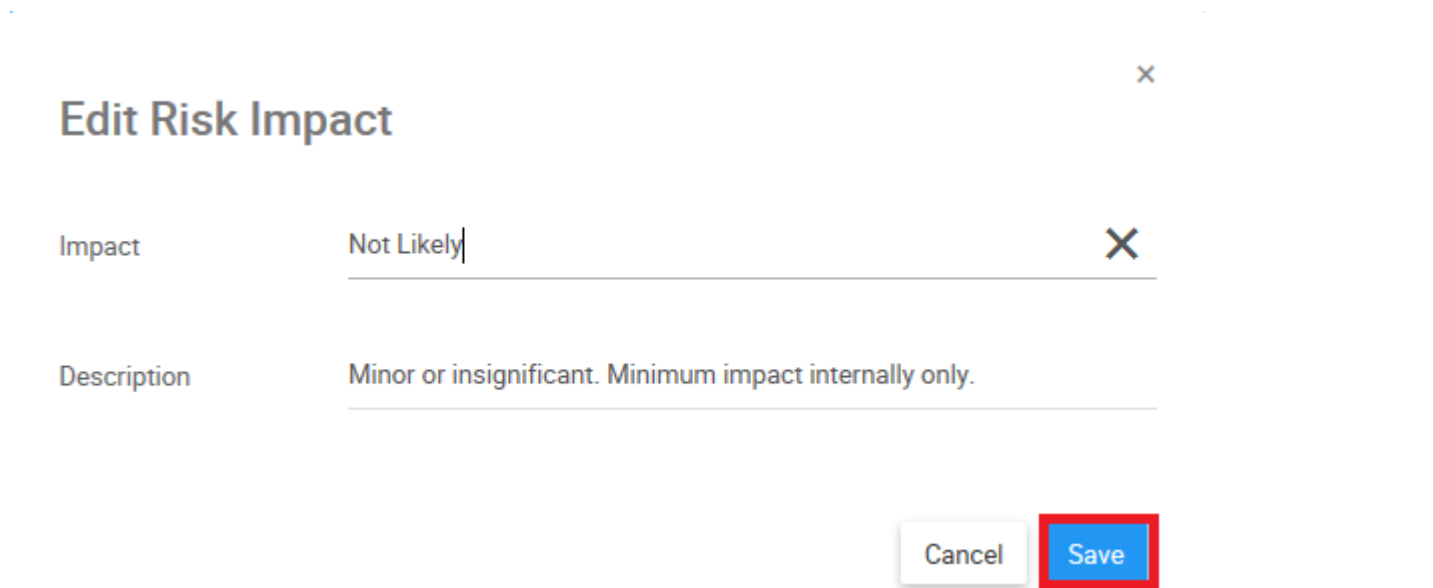
Description

Minor or insignificant. Minimum impact internally only.

Cancel

Save

8. Select the  button to confirm changes



10.7.3.1.2.2 Edit Risk Impact Description

A Description is given by the System Admin to each Risk Impact to explain what their label means. This enable users to better understand the Risk Impact.

To Edit the Risk Impact Description, please follow the next steps

1. Navigate to the System Admin Section
2. Select the Risk tab under the System Admin section

ADMIN

GENERAL
ENVIRONMENT
USERS
GROUPS
SEARCH
LANGUAGE
RISK
ATTRIBUTES
ADVANCED
MODELER

Editing Language

English

Risk Priority Settings

Low Importance

Low

Medium

High

Very High

Risk Matrix Settings

Likelihood

Very Low

Low

Frequent

High

Very High

Very low

Low

Medium

High

Very High

Very low	10	21	30	40	50
Low	20	41	65	80	100
Medium	30	60	91	120	150
High	40	80	120	160	201
Very High	50	100	150	200	250

3. Navigate to the Risk Matrix Settings section

ADMIN

GENERAL

ENVIRONMENT

USERS

GROUPS

SEARCH

LANGUAGE

RISK

ATTRIBUTES

ADVANCED

MODELER

Editing Language

English

Risk Priority Settings

Low Importance

Low

Medium

High

Very High

Risk Matrix Settings

Likelihood

Very Low

Low

Frequent

High

Very High

Very low

Low

Medium

High

Very High

Very low	10	21	30	40	50
Low	20	41	65	80	100
Medium	30	60	91	120	150
High	40	80	120	160	201
Very High	50	100	150	200	250

4. Select the Risk Impact you want to edit. For this example, the “Very Low” Impact is selected

		Likelihood				
		Very Low	Low	Frequent	High	Very High
Impact	Very low	10	21	30	40	50
	Low	20	41	65	80	100
	Medium	30	60	91	120	150
	High	40	80	120	160	201
	Very High	50	100	150	200	250

5. This will create a pop-up window allowing System Admins to fill in the appropriate information concerning the Risk Impact

×

Edit Risk Impact

Impact

Description

6. To edit the **Description** of the Risk Impact, select the Description text box

×

Edit Risk Impact

Impact	Very low
Description	Minor or insignificant. Minimum impact internally only.

Cancel Save

7. For this example, type the edited description “No external affect and quick recovery”

×

Edit Risk Impact

Impact	Very low
Description	No external effect and quick recovery. ×

Cancel Save

8. Select the Save button to confirm changes

×

Edit Risk Impact

Impact	Very low
Description	No external effect and quick recovery.

×

Cancel Save

10.7.3.1.3 Edit Risk Profile

System Admin is responsible to edit the Risk Profile by inputting a Risk Priority and a Risk Score.



The Risk Likelihood and the Risk Impact for the Risk Profile is automatically set by the axis of the Risk Matrix. The System Admin **cannot** edit the Likelihood and Impact under the Risk Profile section. To edit them, refer to [Risk Likelihood](#) and [Risk Impact](#) editing

System Admins can:

1. Edit Risk Profile Priority
2. Edit Risk Profile Score

10.7.3.1.3.1 Edit Risk Profile Priority

System Administrators are responsible to set the Priority for the Risk Profile on the Risk Matrix.

To Edit the Risk Profile Priority, please follow the next steps

1. Navigate to the System Admin Section
2. Select the Risk tab under the System Admin section

ADMIN

GENERAL

ENVIRONMENT

USERS

GROUPS

SEARCH

LANGUAGE

RISK

ATTRIBUTES

ADVANCED

MODELER

Editing Language

English

Risk Priority Settings

Low Importance

Low

Medium

High

Very High

Risk Matrix Settings

Likelihood

Very Low

Low

Frequent

High

Very High

Impact

Very low

Low

Medium

High

Very High

Very low	10	21	30	40	50
Low	20	41	65	80	100
Medium	30	60	91	120	150
High	40	80	120	160	201
Very High	50	100	150	200	250

3. Navigate to the Risk Matrix Settings section

ADMIN

GENERAL

ENVIRONMENT

USERS

GROUPS

SEARCH

LANGUAGE

RISK

ATTRIBUTES

ADVANCED

MODELER

Editing Language

English

Risk Priority Settings

Low Importance

Low

Medium

High

Very High

Risk Matrix Settings

Likelihood

Very Low

Low

Frequent

High

Very High

Very low

Low

Medium

High

Very High

Very low	10	21	30	40	50
Low	20	41	65	80	100
Medium	30	60	91	120	150
High	40	80	120	160	201
Very High	50	100	150	200	250

- Select the Risk Profile you want to edit. For this example, the intersection between the Very Low Likelihood and the Medium with a "30" score is selected

		Likelihood				
		Very Low	Low	Frequent	High	Very High
Impact	Very low	10	21	30	40	50
	Low	20	41	65	80	100
	Medium	30	60	91	120	150
	High	40	80	120	160	201
	Very High	50	100	150	200	250

5. This will create a pop-up window allowing System Admins to fill in the appropriate information concerning the Risk Profile

×

Edit Risk Profile

Likelihood

Very Low

Impact

Medium

Priority :

Low

Score

30

Cancel

Save

6. To edit the **Priority** of the Risk Profile, select the Priority box

×

Edit Risk Profile

Likelihood

Very Low

Impact

Medium

Priority :

Low ✓


Score

30

Cancel

Save

7. This will create a drop-down allowing System Admins to choose the priority name and color.




Edit Risk Profile

Likelihood	Very Low
Impact	Medium
Priority :	<div><div>Low Importance</div><div>Low</div><div>Medium</div><div>High</div><div>Very High</div></div>
Score	

Cancel

Save

8. For this example, choose the “Low Importance” Priority



Edit Risk Profile

Likelihood	Very Low
Impact	Medium
Priority :	<div><div>Low Importance</div><div>Low</div><div>Medium</div><div>High</div><div>Very High</div></div>
Score	

Cancel

Save

9. Select the  button to confirm changes



Edit Risk Profile

Likelihood

Very Low

Impact

Medium

Priority :

Low Importance



Score

30

Cancel

Save

10.7.3.1.3.2 Edit Risk Profile Score

System Administrators are responsible to set the Score for the Risk Profile on the Risk Matrix.

To Edit the Risk Profile Score, please follow the next steps

1. Navigate to the System Admin Section
2. Select the Risk tab under the System Admin section

ADMIN

GENERAL
ENVIRONMENT
USERS
GROUPS
SEARCH
LANGUAGE
RISK
ATTRIBUTES
ADVANCED
MODELER

Editing Language

English

Risk Priority Settings

Low Importance	Low	Medium	High	Very High

Risk Matrix Settings

		Likelihood				
		Very Low	Low	Frequent	High	Very High
Impact	Very low	10	21	30	40	50
	Low	20	41	65	80	100
	Medium	30	60	91	120	150
	High	40	80	120	160	201
	Very High	50	100	150	200	250

3. Navigate to the Risk Matrix Settings section

ADMIN

GENERAL

ENVIRONMENT

USERS

GROUPS

SEARCH

LANGUAGE

RISK

ATTRIBUTES

ADVANCED

MODELER

Editing Language

English

Risk Priority Settings

Low Importance

Low

Medium

High

Very High

Risk Matrix Settings

Likelihood

Very Low

Low

Frequent

High

Very High

Very low

Low

Medium

High

Very High

Very low	10	21	30	40	50
Low	20	41	65	80	100
Medium	30	60	91	120	150
High	40	80	120	160	201
Very High	50	100	150	200	250

4. Select the Risk Profile you want to edit. For this example, the intersection between the Very Low Likelihood and the Medium with a “30” score is selected

		Likelihood				
		Very Low	Low	Frequent	High	Very High
Impact	Very low	10	21	30	40	50
	Low	20	41	65	80	100
	Medium	30	60	91	120	150
	High	40	80	120	160	201
	Very High	50	100	150	200	260

5. This will create a pop-up window allowing System Admins to fill in the appropriate information concerning the Risk Profile

×

Edit Risk Profile

Likelihood

Very Low

Impact

Medium

Priority :

Low

✓

Score

30

Cancel

Save

6. To edit the **Score** of the Risk Profile, select the Score text box

×

Edit Risk Profile

Likelihood	Very Low
Impact	Medium
Priority :	Low ✓
Score	30

CancelSave

7. For this example, type “45” as tue score for the Risk Profile

×

Edit Risk Profile

Likelihood	Very Low
Impact	Medium
Priority :	Low ✓
Score	45 ✕

CancelSave

8. Select the  button to confirm changes

Page 971 of 1049

10.7.3.2 Edit Risk Matrix Language

System Admins can input Risk Settings in different content languages. If the System Admin wants to see the content information about risk settings in different languages, he needs to manually input the translation. For example, if the editing languages available are English and French and wants the content available in these two, he needs to manually input the content in both English and French

System Admins can:

1. [Edit the Risk Likelihood language](#)
2. [Edit the Risk Impact language](#)
3. [Edit the Risk Profile language](#)

10.7.3.2.1 Edit Risk Likelihood Language

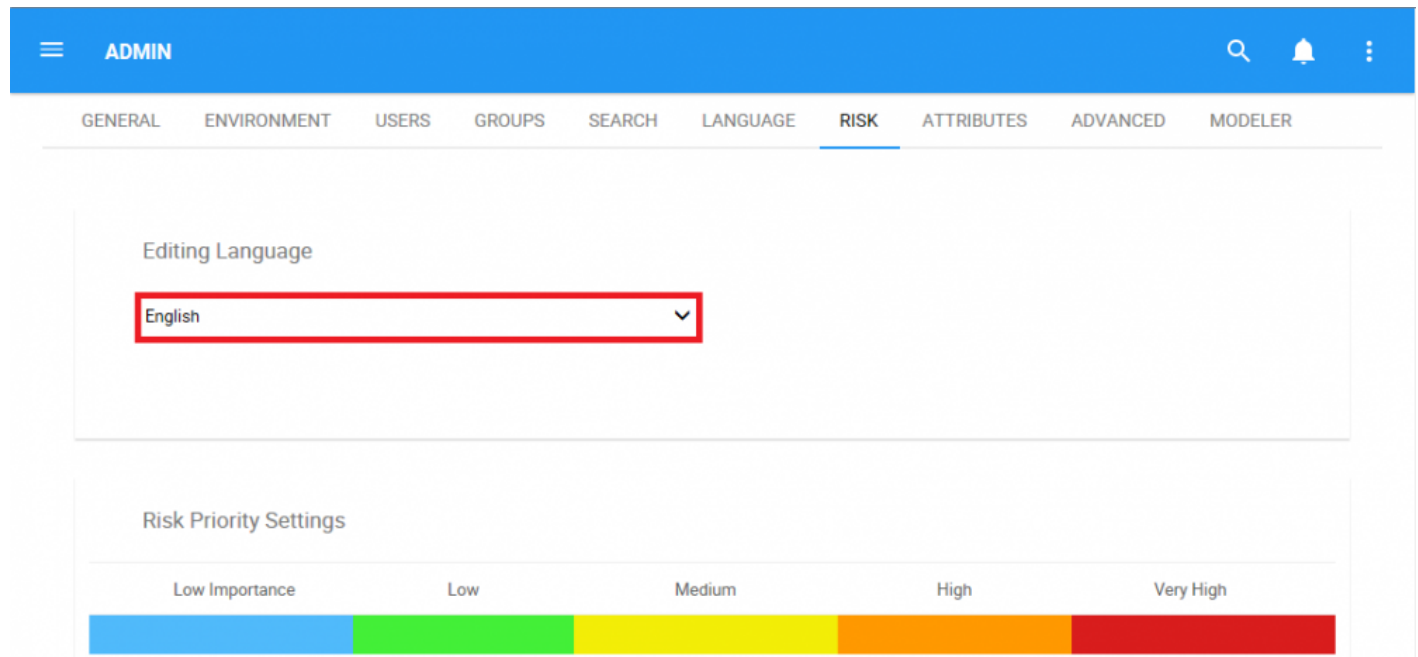
System Admins can input the Risk Likelihood in a different content language. If the System Admin wants to see the content information about risk settings in different languages, he needs to manually input the translation. For example, if the editing languages available are English and French and wants the content available in these two, he needs to manually input the content in both English and French

To Edit the Risk Likelihood in a different language, follow the next steps

1. Navigate to the System Admin Section
2. Select the Risk tab under the System Admin section

The screenshot displays the 'ADMIN' section of the EPC10 WebApp. The 'RISK' tab is highlighted with a red box. Below the tabs, the 'Editing Language' dropdown menu is set to 'English'. The 'Risk Priority Settings' section shows a horizontal bar with five colored segments: Low Importance (blue), Low (green), Medium (yellow), High (orange), and Very High (red).

3. Navigate to the Editing Language section and select the “English” box



ADMIN

GENERAL ENVIRONMENT USERS GROUPS SEARCH LANGUAGE **RISK** ATTRIBUTES ADVANCED MODELER

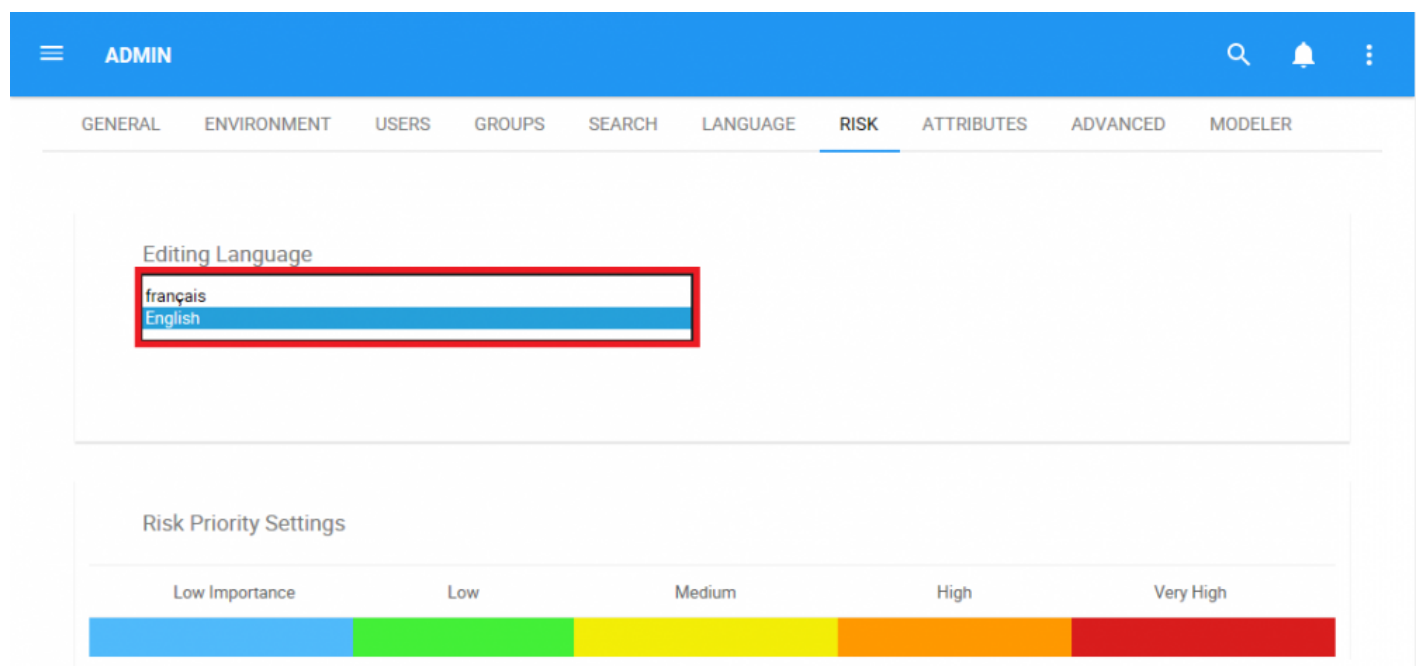
Editing Language

English

Risk Priority Settings

Low Importance Low Medium High Very High

- This will generate a drop-down menu featuring the languages you are allowed to use and create content for



ADMIN

GENERAL ENVIRONMENT USERS GROUPS SEARCH LANGUAGE **RISK** ATTRIBUTES ADVANCED MODELER

Editing Language

français
English

Risk Priority Settings

Low Importance Low Medium High Very High

- Select the language you want to create Risk Likelihood content for. For this example, French is chosen.

ADMIN

GENERALENVIRONMENTUSERSGROUPSSEARCHLANGUAGERISKATTRIBUTESADVANCEDMODELER

Editing Language

français

Risk Priority Settings

[en] Low Importance

Bas

Medium

Élevé

Très élevé

6. Navigate to the Risk Matrix Settings section

ADMIN

GENERALENVIRONMENTUSERSGROUPSSEARCHLANGUAGERISKATTRIBUTESADVANCEDMODELER

Editing Language

français

Risk Priority Settings

[en] Low Importance

Bas

Medium

Élevé

Très élevé

Risk Matrix Settings

Likelihood

	[en] Very Low	Bas	Frequent	Haut	Certain	
Impact	Très bas	10	21	30	40	50
	Faible	20	41	65	80	100
	Modéré	30	60	91	120	150
	Haut	40	80	120	160	201
	Très élevé	50	100	150	200	200

7. Select the Risk Likelihood you want to edit. For this example, select “[en] Very Low”



When the content is available in another language, the language abbreviation in brackets will be displayed. Refer to the section [Understanding Content Languages](#)

Risk Matrix Settings

		Likelihood				
		[en] Very Low	Bas	Frequent	Haut	Certain
Impact	Très bas	10	21	30	40	50
	Faible	20	41	65	80	100
	Modéré	30	60	91	120	150
	Haut	40	80	120	160	201
	Très élevé	50	100	150	200	250

8. This will create a pop-up window with the current English Likelihood name and description

✿ When the content is available in another language, the language abbreviation in brackets will be displayed. Refer to the section [Understanding Content Languages](#)



Edit Risk Likelihood

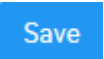
Likelihood	<input type="text" value="[en] Very Low"/>
Description	<input type="text" value="[en] Remote. Not much chance that this would happen."/>

9. Input the content translated in French in the Likelihood box and the Description box. To edit, refer to [Edit Risk Likelihood Name](#) and [Edit Risk Likelihood Description](#)

×

Edit Risk Likelihood

Likelihood	<input type="text" value="Rare"/>
Description	<input type="text" value="Éloigné. Pas beaucoup de chance que cela arrive."/>

9. Select the  box to confirm changes

×

Edit Risk Likelihood

Likelihood	<input type="text" value="Rare"/>
Description	<input type="text" value="Éloigné. Pas beaucoup de chance que cela arrive."/>

10.7.3.2.2 Edit Risk Impact Language

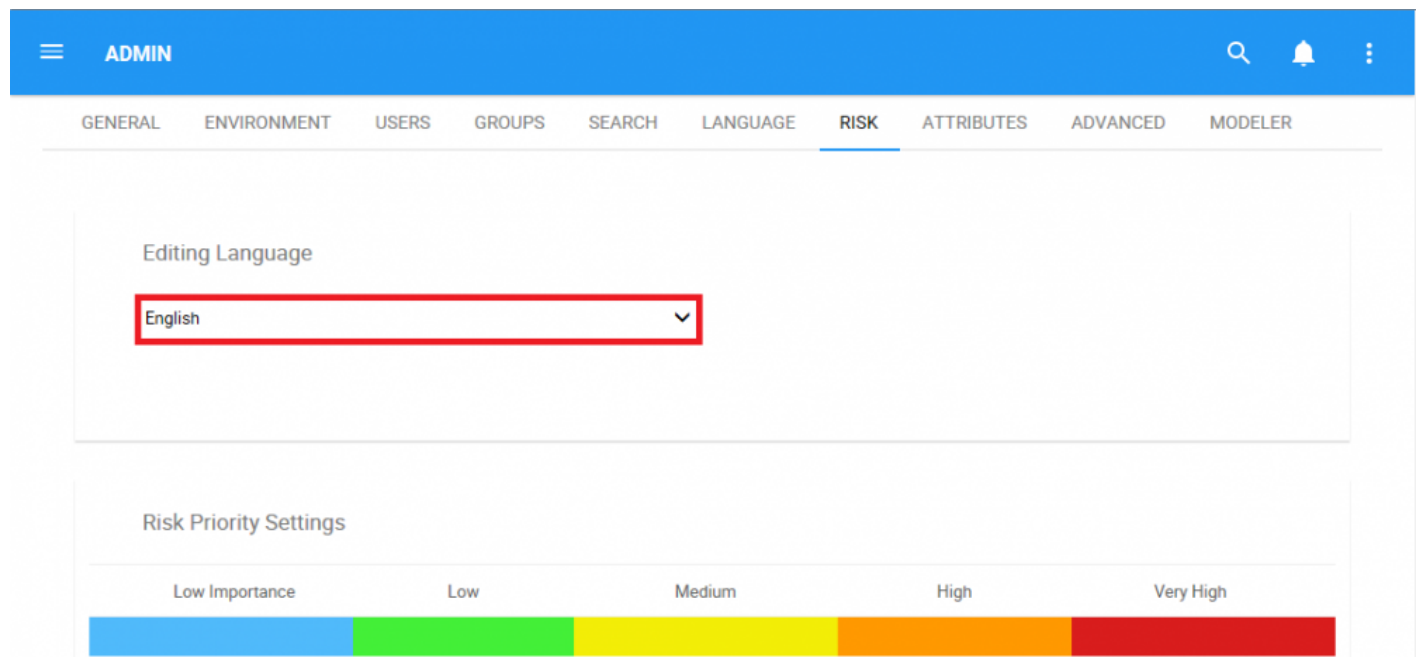
System Admins can input the Risk Impact in a different content language. If the System Admin wants to see the content information about risk settings in different languages, he needs to manually input the translation. For example, if the editing languages available are English and French and wants the content available in these two, he needs to manually input the content in both English and French

To Edit the Risk Impact in a different language, follow the next steps

1. Navigate to the System Admin Section
2. Select the Risk tab under the System Admin section

The screenshot displays the EPC10 WebApp Admin interface. At the top, there is a blue header bar with a hamburger menu icon, the word "ADMIN", a search icon, a bell icon, and a vertical ellipsis icon. Below the header is a horizontal navigation bar with tabs: GENERAL, ENVIRONMENT, USERS, GROUPS, SEARCH, LANGUAGE, RISK, ATTRIBUTES, ADVANCED, and MODELER. The "RISK" tab is highlighted with a red rectangular box. Below the navigation bar, the main content area is divided into two sections. The first section is titled "Editing Language" and contains a dropdown menu with "English" selected and a downward arrow. The second section is titled "Risk Priority Settings" and contains a horizontal bar with five colored segments: blue (labeled "Low Importance"), green (labeled "Low"), yellow (labeled "Medium"), orange (labeled "High"), and red (labeled "Very High").

3. Navigate to the Editing Language section and select the "English" box



ADMIN

GENERAL ENVIRONMENT USERS GROUPS SEARCH LANGUAGE **RISK** ATTRIBUTES ADVANCED MODELER

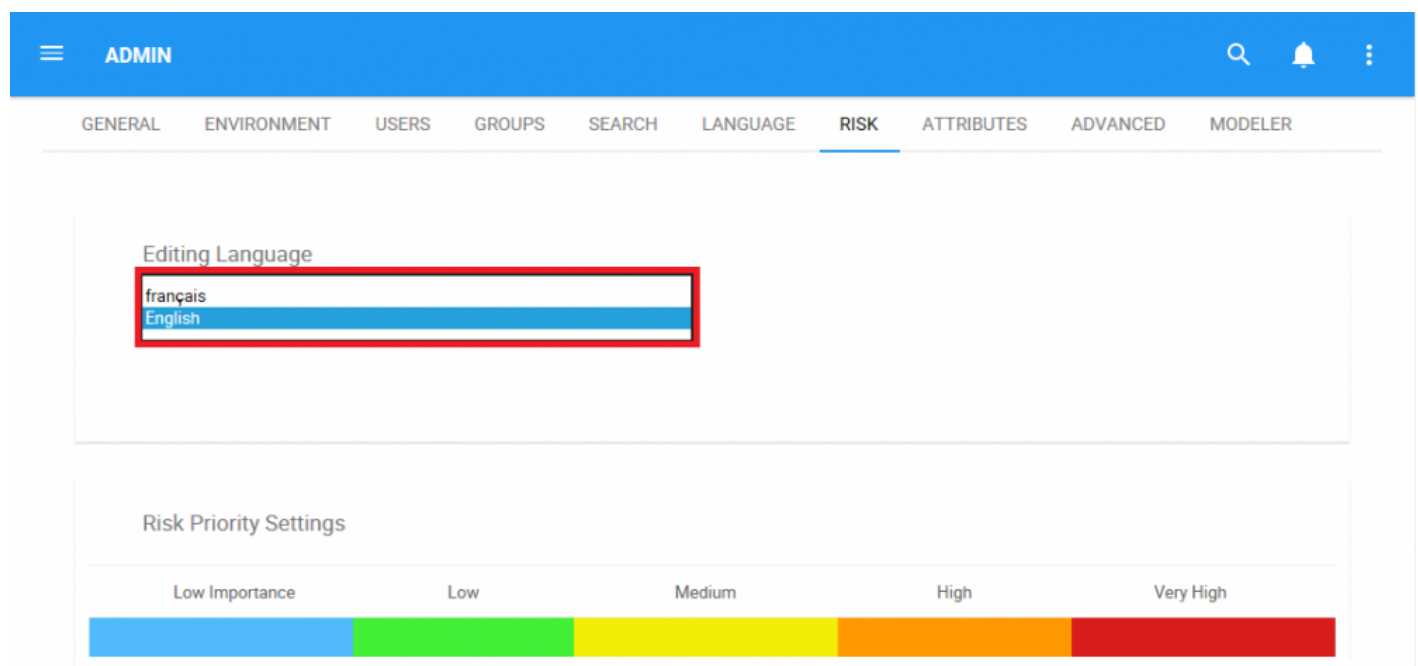
Editing Language

English

Risk Priority Settings

Low Importance Low Medium High Very High

- This will generate a drop-down menu featuring the languages you are allowed to use and create content for



ADMIN

GENERAL ENVIRONMENT USERS GROUPS SEARCH LANGUAGE **RISK** ATTRIBUTES ADVANCED MODELER

Editing Language

français
English

Risk Priority Settings

Low Importance Low Medium High Very High

- Select the language you want to create Risk Impact content for. For this example, French is chosen.

ADMIN

GENERALENVIRONMENTUSERSGROUPSSEARCHLANGUAGERISKATTRIBUTESADVANCEDMODELER

Editing Language

français

Risk Priority Settings

[en] Low Importance

Bas

Medium

Élevé

Très élevé

6. Navigate to the Risk Matrix Settings section

ADMIN

GENERAL
ENVIRONMENT
USERS
GROUPS
SEARCH
LANGUAGE
RISK
ATTRIBUTES
ADVANCED
MODELER

Editing Language

français

Risk Priority Settings

[en] Low Importance

Bas

Medium

Élevé

Très élevé

Risk Matrix Settings

Likelihood

	[en] Very Low	Bas	Frequent	Haut	Certain
Très bas	10	21	30	40	50
Faible	20	41	65	80	100
Modéré	30	60	91	120	150
Haut	40	80	120	160	201
Très élevé	50	100	150	200	200

7. Select the Risk Impact you want to edit. For this example, select “[en] Low”



When the content is available in another language, the language abbreviation in brackets will be displayed. Refer to the section [Understanding Content Languages](#)

		Likelihood				
		Rare	Bas	Frequent	Haut	Certain
Impact	Très bas	10	21	30	40	50
	[en] Low	20	41	65	80	100
	Modéré	30	60	91	120	150
	Haut	40	80	120	160	201
	Très élevé	50	100	150	200	250

8. This will create a pop-up window with the current English Impact name and description

✿ When the content is available in another language, the language abbreviation in brackets will be displayed. Refer to the section [Understanding Content Languages](#)



Edit Risk Impact

Impact

Description

Cancel

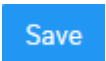
Save

9. Input the content translated in French in the Impact box and the Description box. To edit, refer to [Edit Risk Impact Name](#) and [Edit Risk Impact Description](#)



Edit Risk Impact

Impact	<input type="text" value="Faible"/>
Description	<input type="text" value="Faible impact à l'interne et externe."/>

9. Select the  box to confirm changes



Edit Risk Impact

Impact	<input type="text" value="Faible"/>
Description	<input type="text" value="Faible impact à l'interne et externe."/>

10.7.3.2.3 Edit Risk Profile Language

System Admins can view the Risk Profile in a different content language.

For example, let's pretend the editing languages available are English and French. If the System Admin wants to see the content information about Risk Profile in a different language, he doesn't need to manually edit and translate the content.

This occurs because the Risk Likelihood and the Risk Impact for the Risk Profile are automatically set by the axis of the Risk Matrix. If Risk Likelihood and Risk Impact content was already inputted in French, they will appear in French under [Edit Risk Profile](#). If the content was not previously inputted in French, System Admin can refer to [Edit Risk Likelihood](#) and [Edit Risk Impact](#) to edit the content language.

The same occurs for the Risk Priority, if Risk Priority content was already inputted in French, they will appear in French under [Edit Risk Profile](#). If the content was not previously inputted in French, System Admin can refer to [Edit Risk Priority](#) to edit the content language.



Refer to the section [Understanding Content Languages](#)

To View the Risk Profile in a different language, follow the next steps

1. Navigate to the System Admin Section
2. Select the Risk tab under the System Admin section

The screenshot shows the 'ADMIN' section of the EPC10 WebApp. The top navigation bar is blue with a hamburger menu icon on the left and search, notification, and user icons on the right. Below the navigation bar is a horizontal menu with tabs: GENERAL, ENVIRONMENT, USERS, GROUPS, SEARCH, LANGUAGE, **RISK** (highlighted with a red box), ATTRIBUTES, ADVANCED, and MODELER. The main content area has two sections. The first section, 'Editing Language', contains a dropdown menu with 'English' selected. The second section, 'Risk Priority Settings', contains a horizontal bar with five colored segments: Low Importance (blue), Low (green), Medium (yellow), High (orange), and Very High (red).

3. Navigate to the Editing Language section and select the “English” box

This screenshot is similar to the previous one, showing the 'ADMIN' section of the EPC10 WebApp. The top navigation bar is blue with a hamburger menu icon on the left and search, notification, and user icons on the right. Below the navigation bar is a horizontal menu with tabs: GENERAL, ENVIRONMENT, USERS, GROUPS, SEARCH, LANGUAGE, **RISK** (highlighted with a red box), ATTRIBUTES, ADVANCED, and MODELER. The main content area has two sections. The first section, 'Editing Language', contains a dropdown menu with 'English' selected. The second section, 'Risk Priority Settings', contains a horizontal bar with five colored segments: Low Importance (blue), Low (green), Medium (yellow), High (orange), and Very High (red).

4. This will generate a drop-down menu featuring the languages you are allowed to use and create content for

ADMIN

GENERAL ENVIRONMENT USERS GROUPS SEARCH LANGUAGE **RISK** ATTRIBUTES ADVANCED MODELER

Editing Language

français
English

Risk Priority Settings

Low Importance Low Medium High Very High

5. Select the language you want to view the Risk Profile in. For this example, French is chosen.

ADMIN

GENERAL ENVIRONMENT USERS GROUPS SEARCH LANGUAGE **RISK** ATTRIBUTES ADVANCED MODELER

Editing Language

français

Risk Priority Settings

[en] Low Importance Bas Medium Élevé Très élevé

6. Navigate to the Risk Matrix Settings section

ADMIN

GENERAL

ENVIRONMENT

USERS

GROUPS

SEARCH

LANGUAGE

RISK

ATTRIBUTES

ADVANCED

MODELER

Editing Language

français

Risk Priority Settings

[en] Low Importance

Bas

Medium

Élevé

Très élevé

Risk Matrix Settings

Likelihood

[en] Very Low

Bas

Frequent

Haut

Certain

Impact

Très bas

Faible

Modéré

Haut

Très élevé

10	21	30	40	50
20	41	65	80	100
30	60	91	120	150
40	80	120	160	201
50	100	150	200	200

- Select the Risk Profile you want to edit. For this example, select the intersection between “Rare” and “Modéré” with a score of 30

Risk Matrix Settings

		Likelihood				
		Rare	Bas	Frequent	Haut	Certain
Impact	Très bas	10	21	30	40	50
	Faible	20	41	65	80	100
	Modéré	30	60	91	120	150
	Haut	40	80	120	160	201
	Très élevé	50	100	150	200	250

8. This will create a pop-up window with the French Content available.

×

Edit Risk Profile

Likelihood

Rare

Impact

Modéré

Priority :

Bas ✓

Score

30

Cancel

Save

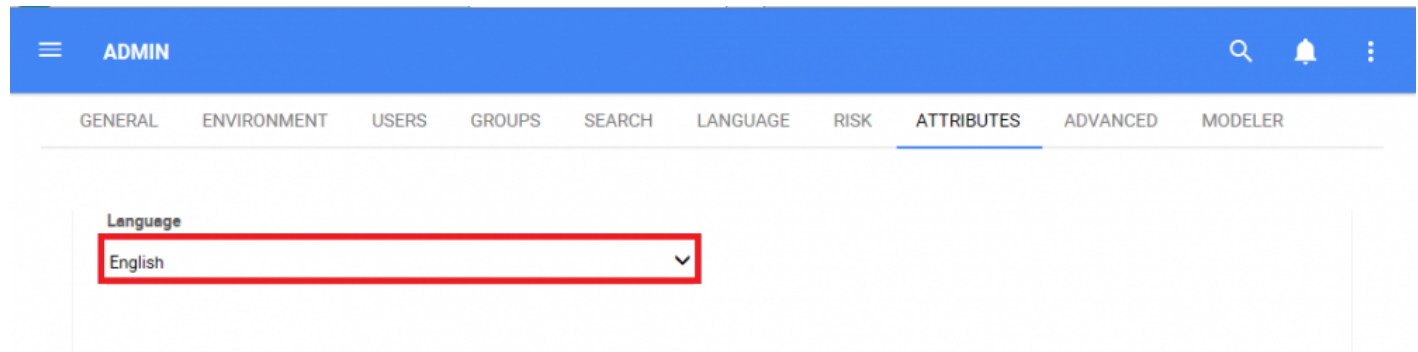
10.8 Attributes

System Admins are responsible to create and determine the [Object Types](#), the [Categories](#), and the [Attributes](#) that will create layers of classification for items.

10.8.1 Content Language

System Admins can input the Object Types, Categories and Attributes in different content languages.

- To see the attributes in a different language, navigate to the language box and choose the language you desire to view the content in



The screenshot shows the 'ADMIN' section of the EPC10 WebApp. The 'ATTRIBUTES' tab is selected. A 'Language' dropdown menu is highlighted with a red box, showing 'English' as the selected option. The dropdown menu is located within a form area.

- When multiple content languages are available for the Object Type, the Category or the Attribute, a language abbreviate in brackets will appear next to the name of the item (e.g. French as [fr], English as [en], Spanish as [sp], etc.). For the following example, the content language chosen is English. There is a French translation of the Object Type; therefore, [fr] is displayed next to the name

ADMIN

GENERALENVIRONMENTUSERSGROUPSSEARCHLANGUAGERISKATTRIBUTESADVANCEDMODELER

Language

English

Object Types

+ Add New Type

Name	Object Type	Description
[fr] Behavioral	Rule	
[fr] Board of Directors	Role	
[fr] Business Operations	KPI	
[fr] Call Force Direct	Resource	
[fr] Call Force Direct	Role	[fr] Consultant provided by CFD
[fr] CDRL	Document	
[fr] Ce message est pour vous aviser que...	Asset	
[fr] City	Org Unit	
[fr] COBIT	Control	[fr] COBIT is a framework created by ISACA for infor...
[fr] Computer - Hardware	Asset	

For further information, read the [Understanding Content Languages](#) section

10.8.2 Object Types

System Admins can add a layer of classification for items by creating object types.

System Admins customize the name and select the types that will be applicable for each object. EPC provides a default list of object types, and System Admins can edit, add and delete to and from that list. System Admins can also choose the language they want to view the object types.

Object Types are used by modelers to classify items by its object type.

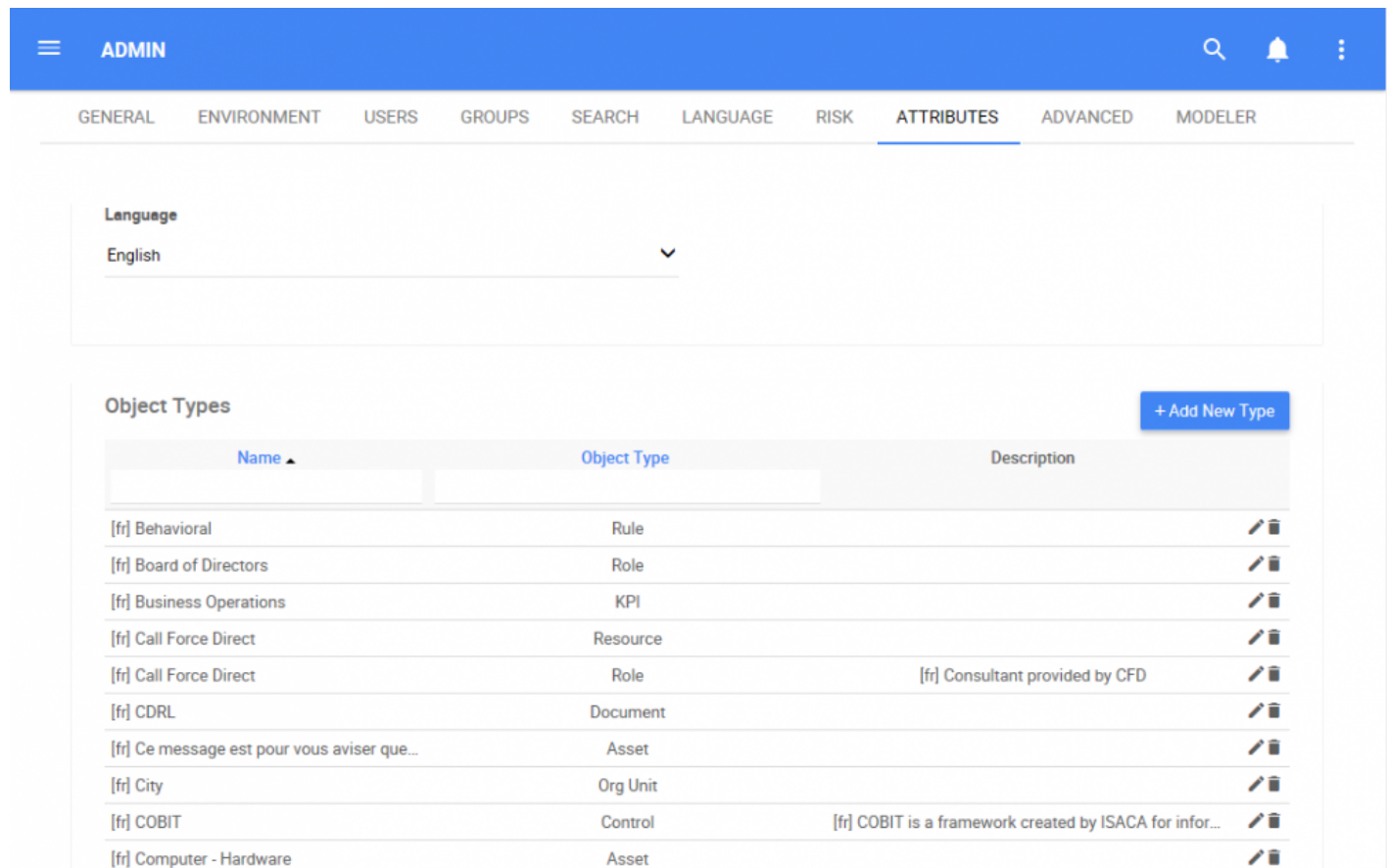
The following list provides all the Objects that can be associated to Object Types:

<u>Object Type List</u>
Asset
Attribute
Control
Document
Entity
KCI
KPI
KRI
Material
Objective
Org Unit
Process
Resource
Risk
Role
Rule
Service

10.8.2.1 Add Object Type

How to Add an Object Type

1. Navigate to the System Admin Section
2. Select the Attributes tab under the System Admin section



The screenshot shows the 'ADMIN' section of the EPC10 WebApp. The 'ATTRIBUTES' tab is selected. The 'Language' dropdown is set to 'English'. The 'Object Types' table is displayed with the following data:

Name	Object Type	Description
[fr] Behavioral	Rule	
[fr] Board of Directors	Role	
[fr] Business Operations	KPI	
[fr] Call Force Direct	Resource	
[fr] Call Force Direct	Role	[fr] Consultant provided by CFD
[fr] CDRL	Document	
[fr] Ce message est pour vous aviser que...	Asset	
[fr] City	Org Unit	
[fr] COBIT	Control	[fr] COBIT is a framework created by ISACA for infor...
[fr] Computer - Hardware	Asset	

3. To add a new object type, select the [+ Add New Type](#) button

ADMIN

GENERAL

ENVIRONMENT

USERS

GROUPS

SEARCH

LANGUAGE

RISK

ATTRIBUTES

ADVANCED

MODELER

Language

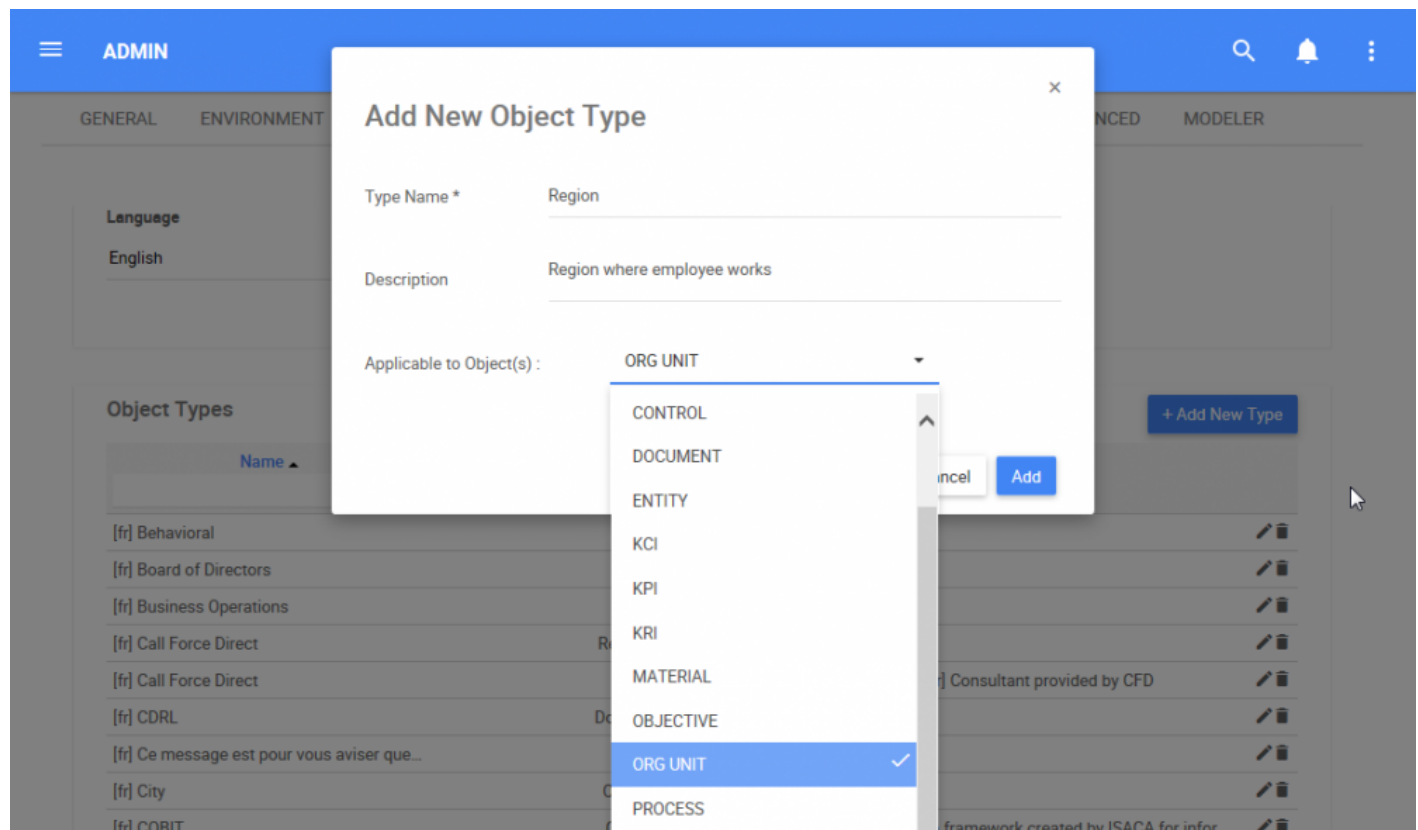
English

Object Types

+ Add New Type

Name	Object Type	Description
[fr] Behavioral	Rule	
[fr] Board of Directors	Role	
[fr] Business Operations	KPI	
[fr] Call Force Direct	Resource	
[fr] Call Force Direct	Role	[fr] Consultant provided by CFD
[fr] CDRL	Document	
[fr] Ce message est pour vous aviser que...	Asset	
[fr] City	Org Unit	
[fr] COBIT	Control	[fr] COBIT is a framework created by ISACA for infor...
[fr] Computer - Hardware	Asset	

4. This will create a pop-up window allowing System Admins to fill in the appropriate information. For this example, we are creating object type called “Region” that will be applicable to the objects within an Organization Unit



5. After inputting the appropriate information, select the **Add** button and the Object Type will be added to the EPC.

10.8.2.2 Edit Object Type

When needed, administrators can edit Object Types. System Admins can perform in-line edits for information displayed in the object type list, or can navigate to the edit section for further editing capabilities.

In-Line Editing

In line edits can be performed by selecting item's name directly within the object type list. Simply click on the name you desire to edit and type in the edited name

Object Types


+ Add New Type










Name ▲	Object Type	Description
[fr] Behavioral	Rule	
[fr] Board of Directors	Role	
[fr] Business Operations	KPI	
[fr] Call Force Direct	Resource	
[fr] Call Force Direct	Role	[fr] Consultant provided by CFD
[fr] CDRL	Document	
[fr] Ce message est pour vous aviser qu...	Asset	
[fr] City	Org Unit	
[fr] COBIT	Control	[fr] COBIT is a framework created by ISACA for infor...
[fr] Computer - Hardware	Asset	

« < 1 2 3 4 > »

Show: 10 - 25 - 50

Editing Window

1. For further editing capabilities, navigate the cursor and select the  icon featured on the right hand-side of each object type

Object Types			+ Add New Type
Name ▲	Object Type	Description	
[fr] Behavioral	Rule		
[fr] Board of Directors	Role		
[fr] Business Operations	KPI		
[fr] Call Force Direct	Resource		
[fr] Call Force Direct	Role	[fr] Consultant provided by CFD	
[fr] CDRL	Document		
[fr] Ce message est pour vous aviser qu...	Asset		
[fr] City	Org Unit		
[fr] COBIT	Control	[fr] COBIT is a framework created by ISACA for infor...	
[fr] Computer - Hardware	Asset		
« < 1 2 3 4 > »			
Show: 10 - 25 - 50			

2. Selecting this item will re-open the full user editing page. System Administrators can edit the Object Type and save

×

Edit Object Type

Type Name *

[fr] Behavioral

Description

Rule concerning behavior

Cancel

Save

✿ NOTE: System Admins **can only edit** the Type Name and the Description of an Object Type. If they want to edit the type, they need to delete the object type and add a new one

10.8.2.3 Delete Object Type

How to delete Object Types

1. Navigate the cursor and select the  icon for the Object Type you want to delete

Object Types + Add New Type

Name ▲	Object Type	Description
[fr] Behavioral	Rule	
[fr] Board of Directors	Role	
[fr] Business Operations	KPI	
[fr] Call Force Direct	Resource	
[fr] Call Force Direct	Role	[fr] Consultant provided by CFD
[fr] CDRL	Document	
[fr] Ce message est pour vous aviser qu...	Asset	
[fr] City	Org Unit	
[fr] COBIT	Control	[fr] COBIT is a framework created by ISACA for infor...
[fr] Computer - Hardware	Asset	

« < 1 2 3 4 >

Show: 10 - 25 - 50

2. The following box will appear and you will be able to delete the Object Type by clicking on the “Delete” box

Confirm Delete

Delete object type [fr] Behavioral?

Cancel





















Delete

10.8.2.4 Search for Object Types

In order to facilitate navigation, the WebApp allows System Admins to easily search for Object Types

- Admins can sort Object Types on ascending or descending order by clicking on the Name or Object Type. For the following example, the table was sorted by Object Type

Object Types + Add New Type



Name	Object Type ▲	Description	
Menu path / Screen	Asset	System screen accessed through the menu path	 
[fr] Software	Asset		 
*dfgdfgdfgdf>?	Asset	test	 
000	Asset		 
Third Party Vendor	Asset		 
[fr] Database	Asset		 
900	Asset		 
00	Asset		 
Outsourcing and contractual relationshi...	Asset		 
Equipment	Asset		 

« < 1 2 > »

Show: 10 - 25 - 50

- Admins can sort the list by searching for an Object Type and typing the name on the search box. For the following example, “Region” was typed and the object type was found

Object Types + Add New Type

Name	Object Type ▲	Description	
[fr] Region	Org Unit	Region where employees work	 

- Admins can sort the list by selecting the Object Type they want to view. Refer to the [Object Type list](#) to view all the types available. For this example, select the Object Type box, and choose “Org Unit” from the drop down list that will appear

Object Types

[+ Add New Type](#)

Name	Object Type	Description
<input type="text" value="Org Unit x"/>		
[fr] City	Org Unit	
[fr] Corporate (shared) Services	Org Unit	[fr] This includes: - Corporate Headquart...
[fr] Country	Org Unit	
[fr] Direction	Org Unit	
[fr] Direction principale	Org Unit	
[fr] DO NOT USE	Org Unit	[fr] MBS
[fr] Filiale	Org Unit	
[fr] hello	Org Unit	[fr] hello
[fr] Plant	Org Unit	
[fr] Region	Org Unit	Region where employees work

« < 1 2 >

Show: 10 - 25 - 50

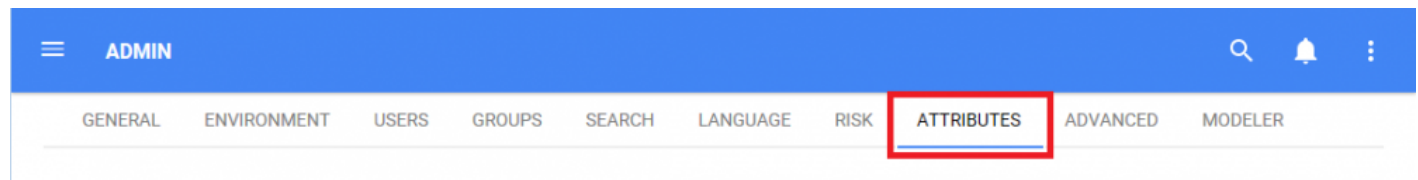
10.8.3 Categories

System Admins are responsible to create Categories to add a layer of classification for items. Admins choose which objects can be part of the category. Categories are used by modelers to items into categories

10.8.3.1 Add Category

How to Add a Category

1. Navigate to the System Admin Section
2. Select the Attributes tab under the System Admin section



3. To add a new Category, select the [+ Add New Category](#) button

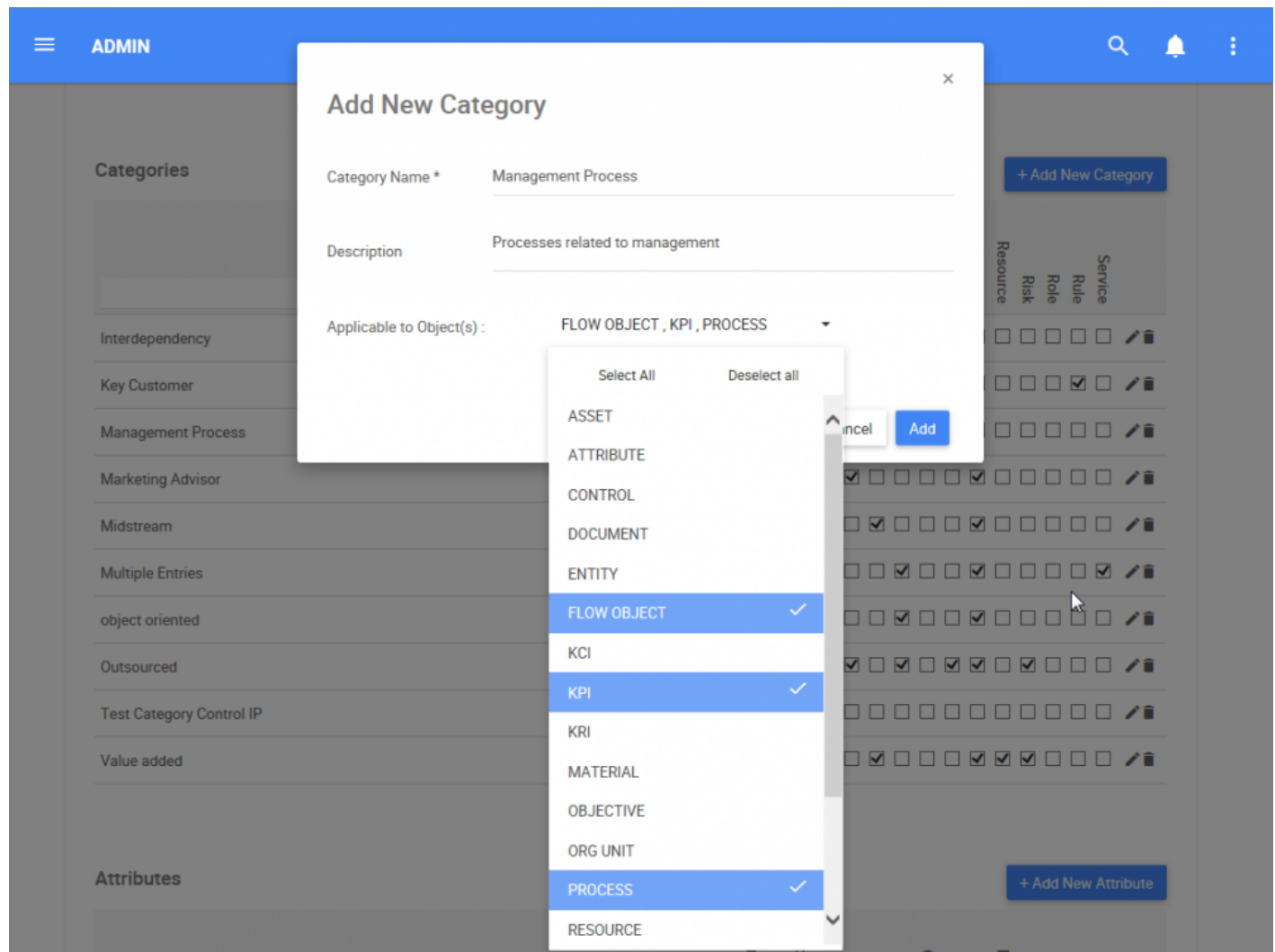
Categories [+ Add New Category](#)

Name ▾	Asset	Attribute	Control	Document	Entity	Flow object	KCI	KPI	KRI	Material	Objective	Org Unit	Process	Resource	Risk	Role	Rule	Service
Interdependency	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Key Customer	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Management Process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing Advisor	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Midstream	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Multiple Entries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
object oriented	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Outsourced	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Test Category Control IP	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Value added	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

« < 1 2 3 >

Show: 10 - 25 - 50

4. This will create a pop-up window allowing System Admins to fill in the appropriate information. For this example, the name of the Category is “Management Process” and is applicable to “Flow Object,” “KPI” and “Process”



5. After inputting the appropriate information, select the **Add** button and the Category will be added to the EPC.

10.8.3.2 Edit Category

When needed, administrators can edit Categories. System Admins can perform in-line edits for information displayed in the object type list, or can navigate to the edit section for further editing capabilities.

In-Line Editing

In line edits can be performed by selecting item's name directly within the Category list. Simply click on the name you desire to edit and type in the edited name

Categories + Add New Category

Name ▲	Asset	Attribute	Control	Document	Entity	Flow object	KCI	KPI	KRI	Material	Objective	Org Unit	Process	Resource	Risk	Role	Rule	Service
Interdependency	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Key Customer	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Management Process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing Advisor	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Midstream	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Multiple Entries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
object oriented	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Outsourced	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Test Category Control IP	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Value added	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

« < 1 2 3 > »

Show: 10 - 25 - 50

In line edits can also be performed to choose the object types applicable for the category. Simply check the icons ☐ ☒ for the Object Type you desire to add or remove to or from the category.

Categories


+ Add New Category

Name ▲	Asset	Attribute	Control	Document	Entity	Flow object	KCI	KPI	KRI	Material	Objective	Org Unit	Process	Resource	Risk	Role	Rule	Service
Interdependency	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Key Customer	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Management Process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing Advisor	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Midstream	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Multiple Entries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
object oriented	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Outsourced	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Test Category Control IP	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Value added	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

« < 1 2 3 >

Show: 10 - 25 - 50

Editing Window

1. For further editing capabilities, navigate the cursor and select the  icon featured on the right hand-side of each Category

Categories

+ Add New Category

Name ▲	Asset	Attribute	Control	Document	Entity	Flow object	KCI	KPI	KRI	Material	Objective	Org Unit	Process	Resource	Risk	Role	Rule	Service
Interdependency	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Key Customer	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Management Process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing Advisor	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Midstream	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Multiple Entries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
object oriented	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Outsourced	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Test Category Control IP	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Value added	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

« < 1 2 3 >

Show: 10 - 25 - 50

2. Selecting this item will re-open the full user editing page. System Administrators can edit the Category and save

ADMIN

Categories

Edit category

Category Name * Management Process

Description Process to the Management

Applicable to Object(s) : FLOW OBJECT , KCI , PROCESS

Cancel Save

10.8.3.3 Delete Category

How to delete Categories

1. Navigate the cursor and select the  icon for the Category you want to delete

Categories

[+ Add New Category](#)

Name ▲	Asset	Attribute	Control	Document	Entity	Flow object	KCI	KPI	KRI	Material	Objective	Org Unit	Process	Resource	Risk	Role	Rule	Service
Interdependency	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Key Customer	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Management Process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing Advisor	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Midstream	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Multiple Entries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
object oriented	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Outsourced	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Test Category Control IP	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Value added	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

« < 1 2 3 >

Show: 10 - 25 - 50

2. The following box will appear and you will be able to delete the Category by clicking on the “Delete” box

Confirm Delete



Delete category **Management Process**?

Cancel

Delete

10.8.3.4 Search for Categories

In order to facilitate navigation, the WebApp allows System Admins to easily search for Categories

- Admins can sort Categories on ascending or descending order by clicking on the Name title.

Categories + Add New Category

Name ▾	Asset	Attribute	Control	Document	Entity	Flow object	KCI	KPI	KRI	Material	Objective	Org Unit	Process	Resource	Risk	Role	Rule	Service
Value Nul	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Value neutral	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Value added	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Test Category Control IP	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Outsourced	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
object oriented	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Multiple Entries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Midstream	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing Advisor	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Management Process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

« < 1 2 > »

Show: 10 - 25 - 50

- Admins can sort the list by searching for a Category and typing the name on the search box. For the following example, “process” was typed and the “Management Process” category was found

Categories

[+ Add New Category](#)

Name ▾	Asset	Attribute	Control	Document	Entity	Flow object	KCI	KPI	KRI	Material	Objective	Org Unit	Process	Resource	Risk	Role	Rule	Service
process x																		
Management Process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Core Process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

10.8.3 Attributes

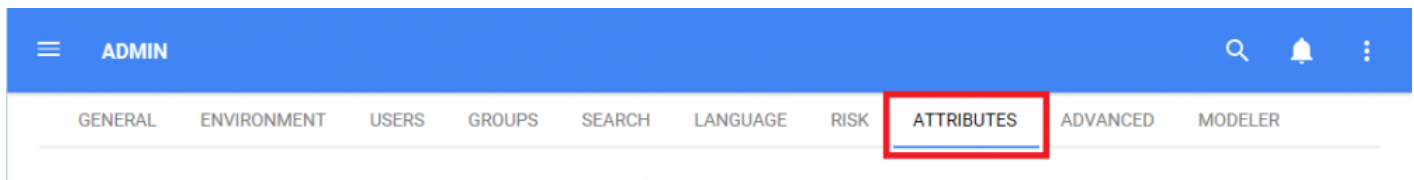
System Admins are responsible to create Attributes and assign them to objects. Attributes are used to add a layer of classification for items.

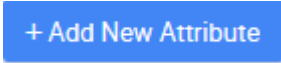
Attributes can have different object types. Attributes will be automatically appear on the object in the Modeler section as well on the Analysis section under the Details tab on the WebApp.

10.8.3.1 Add Attribute

How to Add an Attribute

1. Navigate to the System Admin Section
2. Select the Attributes tab under the System Admin section



3. To add a new Attribute, select the  button

Attributes

+ Add New Attribute

Name	Asset	Attribute	Control	Document	Entity	Flow object	KCI	KPI	KRI	Material	Objective	Org Unit	Process	Resource	Risk	Role	Rule	Service	
[fr] 0045dsf	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
[fr] JUST FR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
0045dsf	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
1en	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
1number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Action Test 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Action Test 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Audit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Blake_Attribute_1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

<< < 1 2 > >>

Show: 10 - 25 - 50

4. This will create a pop-up window allowing System Admins to fill in the appropriate information. For this example, the name of the Attribute is “Salary,” it is applicable to the objects “Role, Resource,” and it’s an USD currency.

ADMIN

Excel Import

Attributes

[fr] 0045dsf

[fr] JUST FR

000

0045dsf

1en

1number

Action Test 1

Action Test 2

Add New Attribute

Attribute Name * Salary

Description Employee's salary per year

Applicable to Object(s) : RESOURCE , ROLE

Attribute Type CURRENCY

Default Currency USD

Default Value Default Value

Is Mandatory ☐

Cancel Add

5. After inputting the appropriate information, select the **Add** button and the Attribute will be added to the EPC.















10.8.3.2 Edit Attribute

When needed, administrators can edit Attributes. System Admins can perform in-line edits for information displayed in the object type list, or can navigate to the edit section for further editing capabilities.

In-Line Editing

In line edits can be performed by selecting item's name directly within the Category list. Simply click on the name you desire to edit and type in the edited name

Attributes
+ Add New Attribute















Name ▾	Asset	Attribute	Control	Document	Entity	Flow object	KCI	KPI	KRI	Material	Objective	Org Unit	Process	Resource	Risk	Role	Rule	Service	
Priorité Action 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
Priorité de l'action 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
really long name really long name really long name really long n...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
Salary	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
sd	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
ss	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
ss3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 

« < 1 2 3 > »

Show: 10 - 25 - 50

In line edits can also be performed to choose the object types applicable for the Attribute. Simply check the icons ☐ ☒ for the Object Type you desire to add or remove to or from the attribute.


Attributes + Add New Attribute

Name ▲	Asset	Attribute	Control	Document	Entity	Flow object	KCI	KPI	KRI	Material	Objective	Org Unit	Process	Resource	Risk	Role	Rule	Service	
Priorité Action 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
Priorité de l'action 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
really long name really long name really long name really long n...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
Salary	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
sd	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
ss	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
ss3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 















« < 1 2 3 > »

Show: 10 - 25 - 50

Editing Window

1. For further editing capabilities, navigate the cursor and select the  icon featured on the right hand-side of each Attribute

Attributes + Add New Attribute

Name ▲	Asset	Attribute	Control	Document	Entity	Flow object	KCI	KPI	KRI	Material	Objective	Org Unit	Process	Resource	Risk	Role	Rule	Service	
Priorité Action 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
Priorité de l'action 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
really long name really long name really long name really long n...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
Salary	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
sd	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
ss	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
ss3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 

« < 1 2 3 > »

Show: 10 - 25 - 50

2. Selecting this item will re-open the full user editing page. System Administrators can edit the Attribute and save

ADMIN

Edit Attribute

Attribute Name * Salary

Description Employee's salary per year

Applicable to Object(s) : RESOURCE , ROLE

Attribute Type CURRENCY

Default Currency AED

Default Value Default Value

Is Mandatory ☐

Cancel Save

10.8.3.3 Delete Attribute

How to delete Attributes

1. Navigate the cursor and select the  icon for the Attribute you want to delete

Attributes + Add New Attribute

Name ▾	Asset	Attribute	Control	Document	Entity	Flow object	KCI	KPI	KRI	Material	Objective	Org Unit	Process	Resource	Risk	Role	Rule	Service
Priorité Action 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Priorité de l'action 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
really long name really long name really long name really long n...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Salary	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
sd	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ss	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ss3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

« < 1 2 3 >

Show: 10 - 25 - 50

2. The following box will appear and you will be able to delete the Attribute by clicking on the “Delete” box

×

Confirm Delete

Delete attribute Salary?

Cancel

Delete




















10.8.3.4 Search for Attributes

In order to facilitate navigation, the WebApp allows System Admins to easily search for Attributes

- Admins can sort Attributes on ascending or descending order by clicking on the Name title.

Attributes

[+ Add New Attribute](#)

Name ▲	Asset	Attribute	Control	Document	Entity	Flow object	KCI	KPI	KRI	Material	Objective	Org Unit	Process	Resource	Risk	Role	Rule	Service
[fr] 0045dsf	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
[fr] JUST FR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
0045dsf	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
1en	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
1number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
Action Test 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
Action Test 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
Audit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	 
Blake_Attribute_1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 

- Admins can sort the list by searching for an Attribute and typing the name on the search box. For the following example, “salary” was typed and the Attribute was found

Attributes

[+ Add New Attribute](#)

Name ▲		Asset	Attribute	Control	Document	Entity	Flow object	KCI	KPI	KRI	Material	Objective	Org Unit	Process	Resource	Risk	Role	Rule	Service
salary x	Salary	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>






















10.9 Advanced

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.

Under the System Admin section, you can find the Advanced tab. The Advanced tab allows admins to modify the settings, keys and values.

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	true	
COGNOS_URL	http://	
ENABLE_NAV_BAR_ERROR	true	
FILE_PREVIEW_TIMER_DEFAULT	60000	
PASSPORT_KERBEROS	{ "servicePrincipalName": "HTTP/myvm.interfacing.com", "verbose": true }	
PASSPORT_KERBEROS_KEYTAB		
PASSPORT_LDAP	{ "ldap": { "url": "ldap://interfacing.local/DC=interfacing,DC=local", "base": "D..."	
PASSPORT_NTLM	{ "domain": "interfacing.local", "domaincontroller": "ldap://interfacing.local/D..."	
PASSPORT_SAML	{ "entryPoint": "https://192.168.100.96/adfs/ls/", "issuer": "https://192.168...."	
PASSPORT_STRATEGY_TO_USE	LOCAL	
PRIVATE_CACHE_URL	http://nginx:8080	
SEARCH_FETCH_DELAY_BETWEEN_PAGES	1000	
SEARCH_FETCH_ITEM_PER_PAGE	25	
SEARCH_MAX_FILE_SIZE	15	
SEARCH_UPDATE_TIMER_DEFAULT	300000	
SEARCH_UPDATE_TIMER_PER_ENV_ID		
WEB_SERVICES_LOGGER_DEFAULT_LEVEL	warn	
WEB_SERVICES_LOGGER_PER_MODULE	{ "api": "info", "unoconv": "info", "preview-creator": "info" }	
WEBTOKEN_EXPIRES_IN	10m	

A description of the settings is provided below:

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

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:

$$(\text{SEARCH_FETCH_DELAY_BETWEEN_PAGES} * \text{SEARCH_FETCH_ITEM_PER_PAGE} * \text{SEARCH_MAX_FILE_SIZE}) \leq (0.5 * \text{Allocated Search docker RAM})$$



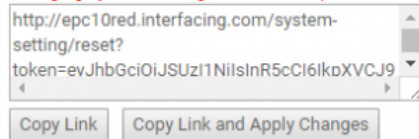
If a System Admin is unclear about the setting, it is recommended to leave the current setting. Erroneous editing of the settings could cause system malfunctions leading to down time. For further question, please contact your technical support team.

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:

WARNING

Changing system settings could cause problems and even make system inaccessible. Copy the link below to be able to restore the Settings. This link is valid for only one hour.



The screenshot shows a web interface with a text box containing the following URL: `http://epc10red.interfacing.com/system-setting/reset?token=evJhbGciOiJSUzI1NiIsInR5cCI6IkpXVCJ9`. Below the text box are two buttons: "Copy Link" and "Copy Link and Apply Changes".

10.9.1 Edit 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 “Advanced” tab
3. The first box displayed is a warning for the System Admin letting him now how changing the system settings could cause problems and even make the system inaccessible. A link to restore the settings is given valid for an hour.

WARNING


Changing system settings could cause problems and even make system inaccessible. Copy the link below to be able to restore the Settings. This link is valid for only one hour.

http://epc10red.interfacing.com/system-setting-api/reset?token=ev1hhGci0i1SI1z11Ni1nR5rCl6lknXVC:1
















<>

Copy Link

Copy Link and Apply Changes

4. Select the Setting you would like to edit by selection the  icon

List of Settings

Key	Value	
BPC_URL	http://nginx:80/api/v1	
CHECK_NOTIFICATION_INTERVAL	60000	
CHECK_SERVER_AVAILABILITY_IN_BROWSER	true	
COGNOS_URL	http://	
ENABLE_GOOGLE_ANALYTICS	false	
ENABLE_NAV_BAR_ERROR	true	
FILE_PREVIEW_TIMER_DEFAULT	60000	
PASSPORT_KERBEROS	{ "servicePrincipalName": "HTTP/myvm.interfacing.com", "verbose": true }	
PASSPORT_KERBEROS_KEYTAB		
PASSPORT_LDAP	{ "ldap": { "url": "ldap://interfacing.local/DC=interfacing,DC=local", "base": "DC=interfa..." }	
PASSPORT_NTLM	{ "domain": "interfacing.local", "domaincontroller": "ldap://interfacing.local/DC=interf..." }	
PASSPORT_SAML	{ "entryPoint": "https://192.168.100.96/adfs/ls/", "issuer": "https://192.168.99.100", "..." }	
PASSPORT_STRATEGY_TO_USE	LOCAL	
PRIVATE_CACHE_URL	http://nginx:8080	
SEARCH_FETCH_DELAY_BETWEEN_PAGES	1000	

5. A pop-up window will be generated on the page. To edit, change the value of the key and navigate to the "Save" box to finish. Be aware that any changes can cause problems

×

Edit BPC_URL

Value

http://nginx:80/api/v1

Cancel

Save

6. Click on the Apply changes button so the new changes are applied on the EPC

7. To revert any changes, simply copy & paste the URL given in the Warning box into your browser and the EPC settings will be re-set.

10.10 Modeler

Under the Modeler tab on the System Admin section, Administrators are responsible of setting the preferences for the Modeler.

Admins can set:

1. [General Preferences](#)
2. [Modeler Preferences](#)

10.10.1 General Preferences

Require a comment at checkin	When System Admin enables this preference, Modeler user must write a comment when checkin an item in progress or published on the Modeler
Automatically generate audit trail at checkin	When System Admin enables this preference, an audit trail will automatically be generated at checkin
Default selected format of new documents	System admin can choose File, File Link or URL as a default document format
Default selected type of process references	System admin can choose Customizable Reference or shortcut as a default type of process reference

How to set General Preferences

Check preference box

1. Navigate to the System Admin section and go to the Modeler tab

The screenshot shows the EPC Portal Admin interface. At the top, there is a blue header bar with a menu icon, the word "ADMIN", a search icon, a bell icon, and a three-dot menu icon. Below the header is a horizontal navigation bar with tabs: GENERAL, ENVIRONMENT, USERS, GROUPS, SEARCH, LANGUAGE, RISK, ATTRIBUTES, ADVANCED, and MODELER. The MODELER tab is highlighted with a red rectangle. Below the navigation bar, the "General Preferences" section is displayed. It contains four settings:


- Require a comment at checkin :** A checkbox that is currently unchecked.
- Default selected format of new documents :** A dropdown menu with "URL" selected.
- Automatically generate audit trail at checkin :** A checkbox that is currently unchecked.
- Default selected type of process references :** A dropdown menu with "SHORTCUT" selected.

Below the General Preferences section is the "Modeler Preferences" section. It contains a text instruction: "To edit modeler preferences, click the hyperlink below to be redirected." followed by a blue hyperlink labeled "EPC Portal Admin".


2. Under the General Preferences, check the ☐ box. For this example, check the “Require a comment at checkin box”

General Preferences

Require a comment at checkin :	<input type="checkbox"/>	Default selected format of new documents :	URL	▼
Automatically generate audit trail at checkin :	<input type="checkbox"/>	Default selected type of process references :	SHORTCUT	▼

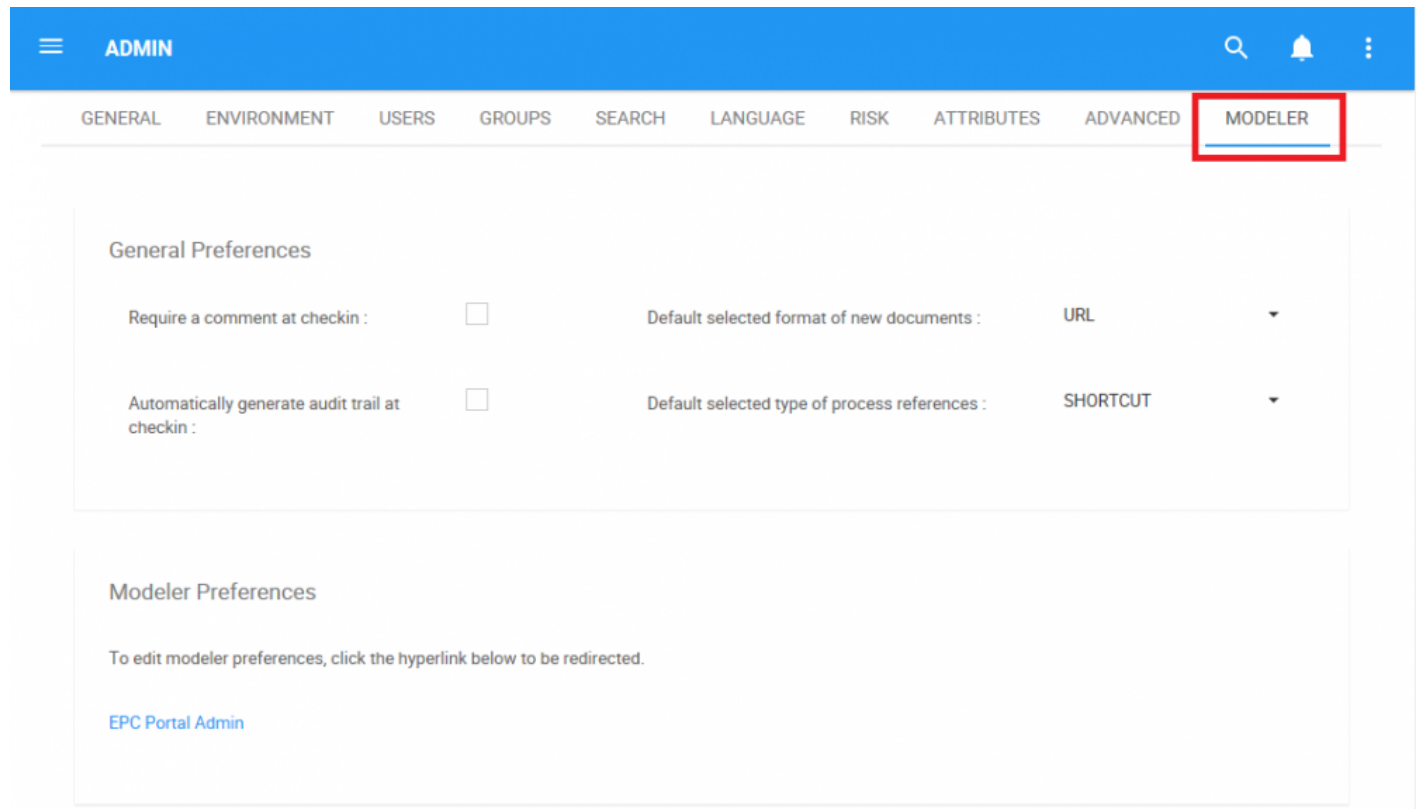
3. The checked box will appear with this  icon

General Preferences

Require a comment at checkin :		Default selected format of new documents :	URL	▼
Automatically generate audit trail at checkin :	<input type="checkbox"/>	Default selected type of process references :	SHORTCUT	▼

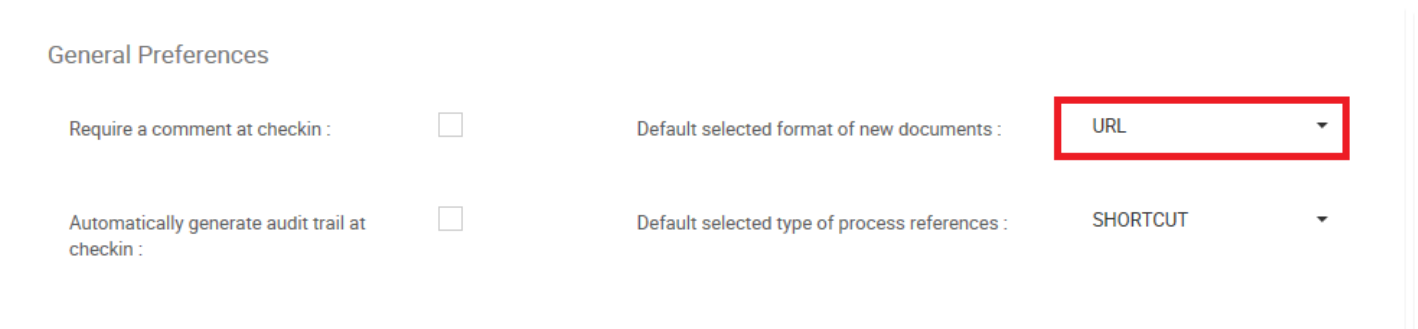
Select drop-down preference item

1. Navigate to the System Admin section and go to the Modeler tab



The screenshot shows the 'ADMIN' section of the EPC10 WebApp. The top navigation bar is blue with a menu icon, the word 'ADMIN', a search icon, a bell icon, and a three-dot menu icon. Below the navigation bar is a horizontal menu with tabs: GENERAL, ENVIRONMENT, USERS, GROUPS, SEARCH, LANGUAGE, RISK, ATTRIBUTES, ADVANCED, and MODELER. The 'MODELER' tab is highlighted with a red box. The main content area is divided into two sections: 'General Preferences' and 'Modeler Preferences'. The 'General Preferences' section contains four settings: 'Require a comment at checkin' (checkbox), 'Default selected format of new documents' (dropdown menu showing 'URL'), 'Automatically generate audit trail at checkin' (checkbox), and 'Default selected type of process references' (dropdown menu showing 'SHORTCUT'). The 'Modeler Preferences' section contains a text instruction: 'To edit modeler preferences, click the hyperlink below to be redirected.' and a blue hyperlink labeled 'EPC Portal Admin'.

2. Under the General Preferences, select the box next to “Default selected format of new documents” for this example



This is a close-up of the 'General Preferences' section. It shows four settings: 'Require a comment at checkin' (checkbox), 'Default selected format of new documents' (dropdown menu showing 'URL'), 'Automatically generate audit trail at checkin' (checkbox), and 'Default selected type of process references' (dropdown menu showing 'SHORTCUT'). The dropdown menu for 'Default selected format of new documents' is highlighted with a red box.

3. A drop-down menu will appear, and select option you desire. For this example, select “File” and it will automatically be saved

General Preferences

Require a comment at checkin :

☐

Default selected format of new documents :

FILE ▼

Automatically generate audit trail at
checkin :☐

Default selected type of process references :

FILE ✓

FILE LINK

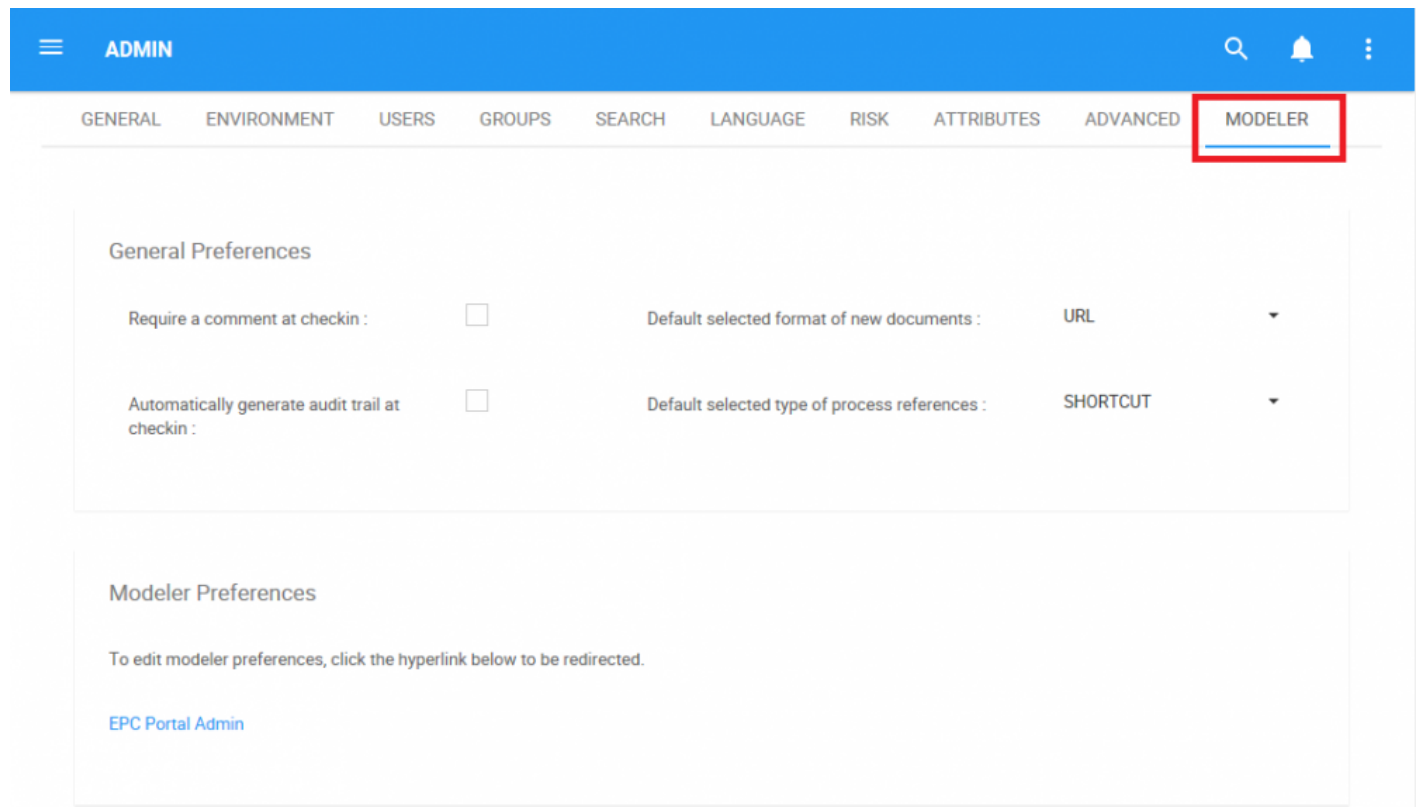
URL

10.10.2 Modeler Preferences

For the Modeler Preferences, System Admin needs to click on the hyperlink to be redirected to the edit page

How to access the Modeler Preferences

1. Navigate to the Modeler tab under the System Admin section



The screenshot shows the EPC Portal Admin interface. At the top, there is a blue header bar with a hamburger menu icon, the word "ADMIN", a search icon, a bell icon, and a three-dot menu icon. Below the header, there is a horizontal navigation bar with several tabs: GENERAL, ENVIRONMENT, USERS, GROUPS, SEARCH, LANGUAGE, RISK, ATTRIBUTES, ADVANCED, and MODELER. The MODELER tab is highlighted with a red rectangular box. Below the navigation bar, the main content area is divided into two sections. The first section is titled "General Preferences" and contains four settings: "Require a comment at checkin :" with an unchecked checkbox, "Default selected format of new documents :" with a dropdown menu showing "URL", "Automatically generate audit trail at checkin :" with an unchecked checkbox, and "Default selected type of process references :" with a dropdown menu showing "SHORTCUT". The second section is titled "Modeler Preferences" and contains a text instruction: "To edit modeler preferences, click the hyperlink below to be redirected." Below this instruction is a blue hyperlink labeled "EPC Portal Admin".

2. Click on the hyperlink on the Modeler Preferences

Modeler Preferences

To edit modeler preferences, click the hyperlink below to be redirected.

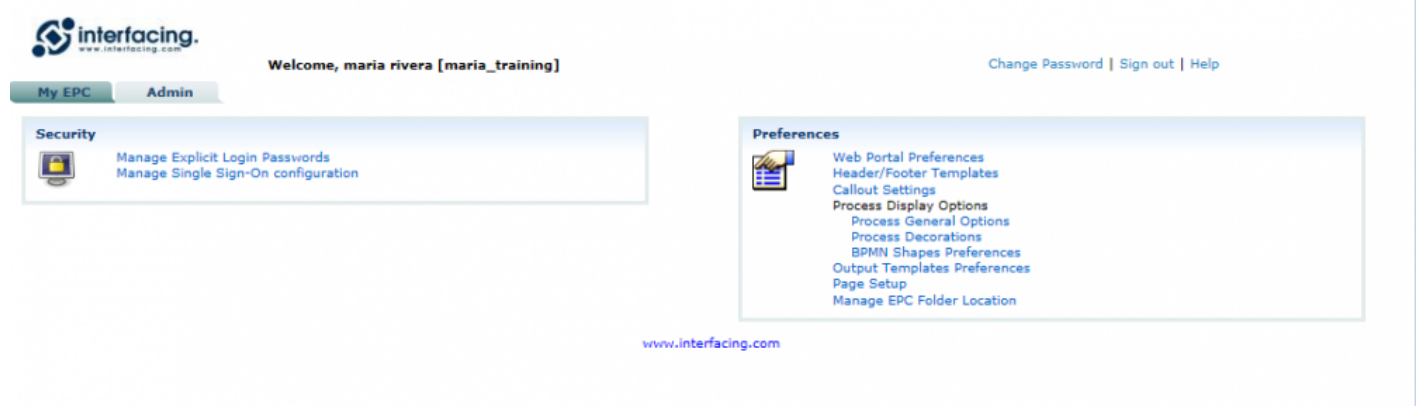
[EPC Portal Admin](#)

3. System Admin will be redirected to the EPC Portal, he will need to log in to access the Modeler Preferences



The login form features the Interfacing logo at the top left, followed by the text "Please enter your username and password." Below this are two input fields: "User name" and "Password". A "Login" button is positioned below the password field. To the right of the input fields is a large green graphic of a stylized person. At the bottom, the text "Interfacing. ENTERPRISE PROCESS CENTER" is displayed.

4. After logging in, the System Admin will be able to edit the Security and Preferences



The dashboard shows the user "Welcome, maria rivera [maria_training]" at the top. Navigation tabs for "My EPC" and "Admin" are present. The "Admin" tab is active, showing two main sections: "Security" and "Preferences". The "Security" section includes links for "Manage Explicit Login Passwords" and "Manage Single Sign-On configuration". The "Preferences" section includes links for "Web Portal Preferences", "Header/Footer Templates", "Callout Settings", "Process Display Options", "Process General Options", "Process Decorations", "BPMN Shapes Preferences", "Output Templates Preferences", "Page Setup", and "Manage EPC Folder Location". A "Change Password | Sign out | Help" link is located in the top right corner. The footer displays "www.interfacing.com".


10.11 Home Page Widgets

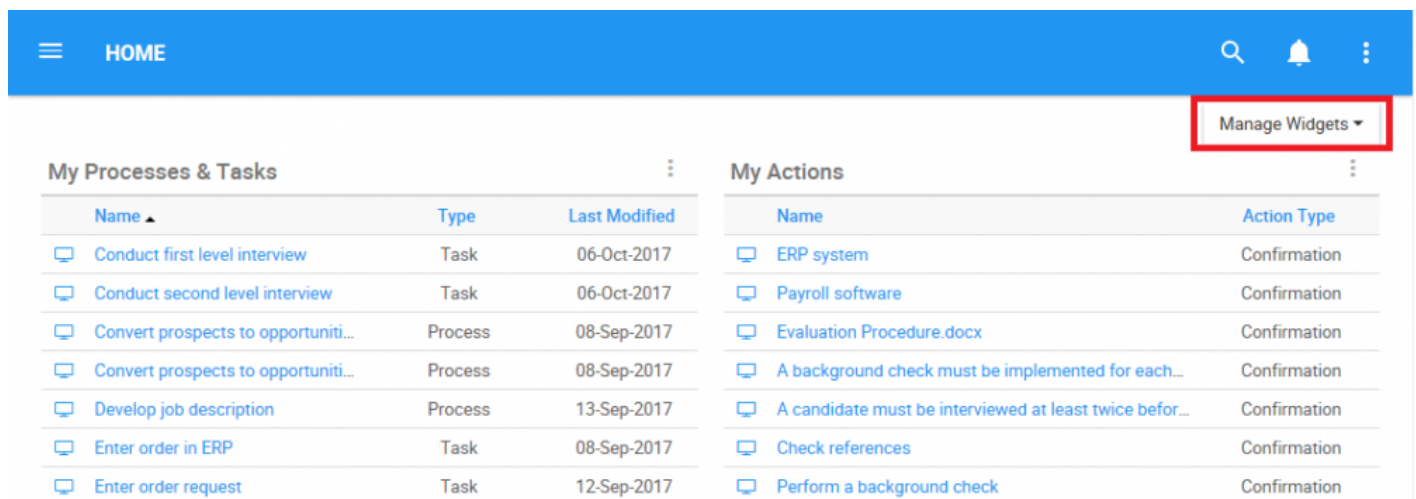
System Admins have control over default settings for their specific system. Setting defaults allows System Admins to create templates for the users to optimize their use of the EPC.

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 the Home page and select the  icon

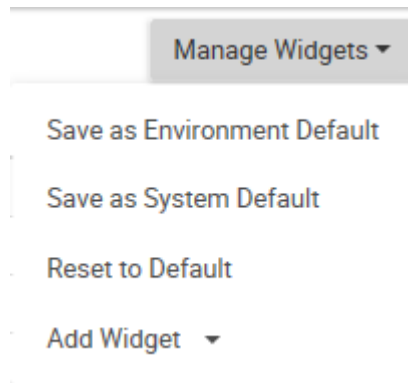


The screenshot shows the EPC Home page interface. At the top is a blue header bar with a hamburger menu icon, the word 'HOME', a search icon, a bell icon, and a vertical ellipsis icon. Below the header, there are two main sections: 'My Processes & Tasks' and 'My Actions'. The 'My Processes & Tasks' section contains a table with columns 'Name', 'Type', and 'Last Modified'. The 'My Actions' section contains a table with columns 'Name' and 'Action Type'. A red box highlights the 'Manage Widgets' dropdown menu located in the top right corner of the page.

Name	Type	Last Modified
Conduct first level interview	Task	06-Oct-2017
Conduct second level interview	Task	06-Oct-2017
Convert prospects to opportuniti...	Process	08-Sep-2017
Convert prospects to opportuniti...	Process	08-Sep-2017
Develop job description	Process	13-Sep-2017
Enter order in ERP	Task	08-Sep-2017
Enter order request	Task	12-Sep-2017

Name	Action Type
ERP system	Confirmation
Payroll software	Confirmation
Evaluation Procedure.docx	Confirmation
A background check must be implemented for each...	Confirmation
A candidate must be interviewed at least twice befor...	Confirmation
Check references	Confirmation
Perform a background check	Confirmation

3. This will generate a drop down menu



4. Select **Save as System Default** 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](#).

11.0 Icons and Glossary

The following sections are provided to help users understand the content of the EPC, user manuals and exercises.

















1. [Web App Icons](#)
2. [Key Terms](#)





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](#)




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












	Set (Process, Document, Organization)
	Document Folder
	Graphs <ul style="list-style-type: none">• Impact• Map• Hierarchy
	<ul style="list-style-type: none">• 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

	Categories
	Annotations
	Event & Gateway Name

11.1.3 Toolbar Icons

Icon	Item
 or 	Fit Screen
 or 	Full Screen
	Zoom In
	Zoom Out
	Options
	Auto Layout
	Print
 	<ul style="list-style-type: none">• Unsubscribed• Subscribed


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

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)

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

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 value 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

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