EPC - WebApp Manual

13.0 — Last update: Jan 24, 2022

Interfacing Technologies Corporation

© 2020 Interfacing Technologies Corporation

Table of Contents

Technical Support **26**

Disclaimer **27**

FAQs **28**

1.0 Enterprise Process Center **29**
- 1.1 Process Viewing 30
- 1.2 Collaborative Environment 32
- 1.3 User Categories 33
- 1.4 BPMN 2.0 34
- 1.5 Governance 35
- 1.6 Performance 36

2.0 EPC 13.0 New Features and Functions **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
  - 4.1.2 Cognito Login 46
- 4.2 Home 47
  - 4.2.1 Widgets 48
    - 4.2.1.1 Widget Dashboard Manager 49
      - 4.2.1.1.1 Access Dashboard Manager 50
      - 4.2.1.1.2 Add Widgets to Home Page 52
      - 4.2.1.1.3 My Objects Widget 56
        - 4.2.1.1.3.1 Customize My Objects Widgets 58
      - 4.2.1.1.4 My Documents Widget 75
        - 4.2.1.1.4.1 Customize My Documents Widgets 77
      - 4.2.1.1.5 My Performance Widget 91
        - 4.2.1.1.5.1 Customize My Performance Widgets 93
      - 4.2.1.1.6 My Actions Widget 104
        - 4.2.1.1.6.1 Customize My Actions Widgets 107
      - 4.2.1.1.7 My Performance Chart Widget 112
        - 4.2.1.1.7.1 Customize My Performance Chart Widgets 116
      - 4.2.1.1.8 My Posts & Replies Chart Widget 125
        - 4.2.1.1.8.1 Customize My Posts & Replies Chart Widgets 130

4.2.1.1.9 My Actions Pending Widget 139
4.2.1.1.9.1 Customize My Actions Pending Widgets 141
4.2.1.1.10 My Risk Chart 147
4.2.1.1.11 External Website Widget 151
4.2.1.1.11.1 Customizing the External Website Widget 152
4.2.1.1.12 My Map Widget 154
4.2.1.1.12.1 Customizing My Map Widget 157
4.2.1.1.13 HTML Widget 159
4.2.1.1.13.1 Customizing the HTML Widget 160
4.2.1.1.14 Google Analytics Widget 162
4.2.1.1.14.1 Customizing the Google Analytics Widget 165
4.2.1.1.15 Object Sent for Approval widget 168
4.2.1.1.15.1 Customizing the Object Sent for Approval widget 170
4.2.1.1.16 Object Sent for Endorsement widget 175
4.2.1.1.16.1 Customizing the Object Sent for Endorsement widget 177
4.2.1.2 Customize Widgets Content 182
4.2.1.2.1 Customization Rules 183
4.2.1.2.8.1 Widget Filter Categories 188
4.2.1.3 Customize Home Page Layout 191
4.2.1.3.1 Layout Options 192
4.2.1.3.2 Resize Widgets 195
4.2.1.3.3 Move Widgets within a Home Page 197
4.2.1.3.4 Remove Widgets from Home Page 199
4.2.1.4 Customize Home Page Tabs 200
4.2.1.4.1 Adding, Removing and Re-naming Tabs 201
4.2.1.4.2 Re-ordering Tabs 202
4.2.1.4.3 Permission on Tabs 203
4.2.1.5 Reset to Default Widgets 205
4.2.2 My Dashboards 206
4.3 General Navigation 208
4.3.1 Navigation between Modules 210
4.3.2 Navigation within a Module 213
4.3.3 Last Visited Tab 219
4.4 Process 221
4.4.1 Module Overview 222
4.4.2 List 224
4.4.2.1 Sorting 228
4.4.2.2 Filtering 230
4.4.2.2.1 Default Filter 233
4.4.2.2.2 Remove Filter 234
4.4.2.2.3 Add Filter 235
4.4.2.2.4 Combine Filter 236

4.4.2.3 Quick Graph View 237
4.4.3 Graph 238
4.4.3.1 Graph Navigation 239
4.4.3.1.1 Navigating in Graphs 243
4.4.3.1.1.1 Fit Screen 245
4.4.3.1.1.2 Full Screen 247
4.4.3.1.1.3 Zoom In 249
4.4.3.1.1.4 Zoom Out 252
4.4.3.1.1.5 Options 254
4.4.3.1.1.6 Auto Layout 262
4.4.3.1.1.7 Print 264
4.4.3.1.1.7.1 Printing from Internet Explorer 266
4.4.3.1.1.8 Subscribe 269
4.4.3.1.1.10 Overview Window 270
4.4.3.1.1.11 Localize (View local copies of processes) 272
4.4.3.1.1.12 Process Synchronization 276
4.4.3.1.1.13 Share 277
4.4.3.1.1.14 Sync 279
4.4.3.1.1.15 Download 281
4.4.3.2 Map Graph 282
4.4.3.2.1 Graph View 283
4.4.3.2.2 Swimlanes 284
4.4.3.2.3 Matrix Swimlanes 286
4.4.3.2.4 Process Preference View 288
4.4.3.2.5 Map Options Customization 289
4.4.3.2.5.7 Highlight 318
4.4.3.2.5.7.1 Critical Path 320
4.4.3.2.5.7.2 High Risk Path 323
4.4.3.2.5.7.3 Value Added 326
4.4.3.2.5.7.4 My Tasks 329
4.4.3.2.5.7.5 Manual vs. Automated 332
4.4.3.2.5.7.6 Highlight ‘‘Happy Path’‘ Filter 335
4.4.3.2.6 Map Graph Printing 337
4.4.3.2.6.1 Manual Print 339
4.4.3.2.6.2 Dynamic Print 344
4.4.3.3 Impact Graph 348
4.4.3.4 Hierarchy Graph 353
4.4.4 Details 356
4.4.4.1 Navigation 357
4.4.4.1.1 Toolbar 358
4.4.4.1.1.1 Value-Stream Navigation 359
4.4.4.1.1.2 Hierarchy Navigation 362

4.4.4.1.1.3 Print 363
4.4.4.1.1.4 Subscribe 365
4.4.4.1.2 Details Drilldown 366
4.4.4.2 Attributes 368
4.4.4.2.1 Description 369
4.4.4.2.2 Goal 370
4.4.4.2.3 Responsibilities Preview 371
4.4.4.2.4 Association Sections 372
4.4.4.2.5 Documents 373
4.4.4.2.6 Master Data 375
4.4.4.2.7 SIPOC 376
4.4.4.2.8 Versioning 377
4.4.4.2.9 Summary 378
4.4.4.2.9.1 Responsibilities Summary 382
4.4.4.2.9.2 Documents Summary 385
4.4.4.2.9.3 Risks Summary 387
4.4.4.2.10 Impacts 389
4.5 Performance 392
4.5.1 Module Overview 393
4.5.2 List 395
4.5.2.1 Sorting 399
4.5.2.2 Filtering 401
4.5.2.2.1 Add Filter 403
4.5.2.2.2 Remove Filter 405
4.5.2.2.3 Combine Filter 406
4.5.2.3 Quick Graph View 407
4.5.3 Graph 408
4.5.3.1 Graph Navigation 409
4.5.3.1.1 Navigating In Graphs 411
4.5.3.1.1.2 Fit Screen 413
4.5.3.1.1.3 Full Screen 414
4.5.3.1.1.4 Zoom In 415
4.5.3.1.1.5 Zoom Out 416
4.5.3.1.1.5 Print 417
4.5.3.1.1.5 Settings 418
4.5.3.1.1.7 Subscribe 419
4.5.3.2 Impact Graph 420
4.5.3.3 Hierarchy Graph 424
4.5.3.4 Overview Graph 428
4.5.3.4.1 Inputting Performance 431
4.5.4 Details 433
4.5.4.1 Toolbar 434

4.5.4.1.1 Print ... 435
4.5.4.1.4 Subscribe ... 436
4.5.4.2 Attributes ... 437
4.5.4.2.1 Description ... 438
4.5.4.2.2 Responsibilities ... 439
4.5.4.2.3 Association Sections ... 440
4.5.4.2.4 Documents ... 441
4.5.4.2.5 Versioning ... 443
4.5.4.2.6 Impacts ... 444
4.6 Organization ... 447
4.6.1 Module Overview ... 448
4.6.2 List ... 450
4.6.2.1 Sorting ... 452
4.6.2.2 Filtering ... 454
4.6.2.2.1 Add Filter ... 456
4.6.2.2.2 Remove Filter ... 458
4.6.2.2.3 Combine Filter ... 459
4.6.2.3 Quick Graph View ... 460
4.6.3 Graph ... 461
4.6.3.1 Graph Navigation ... 462
4.6.3.1.1 Navigating In Graphs ... 463
4.6.3.1.1.2 Fit Screen ... 465
4.6.3.1.1.3 Full Screen ... 467
4.6.3.1.1.4 Zoom In ... 469
4.6.3.1.1.5 Zoom Out ... 470
4.6.3.1.1.5 Print ... 471
4.6.3.1.1.7 Settings ... 472
4.6.3.1.1.8 Subscribe ... 473
4.6.3.2 Impact Graph ... 474
4.6.3.3 Hierarchy Graph ... 477
4.6.4 Details ... 480
4.6.4.1 Navigation ... 481
4.6.4.1.1 Toolbar ... 482
4.6.4.1.1.1 Print ... 483
4.6.4.1.1.4 Subscribe ... 484
4.6.4.2 Attributes ... 485
4.6.4.2.1 Description ... 486
4.6.4.2.2 Organization Sub Units ... 487
4.6.4.2.3 Directors ... 489
4.6.4.2.4 Documents ... 490
4.6.4.2.5 Versioning ... 492
4.6.4.2.6 Impacts ... 493

4.7 Documents ... 496
4.7.1 Module Overview ... 497
4.7.2 List ... 499
4.7.2.1 Sorting ... 502
4.7.2.2 Filtering ... 504
4.7.2.2.1 Add Filter ... 506
4.7.2.2.2 Remove Filter ... 508
4.7.2.2.3 Combine Filter ... 509
4.7.2.3 Quick Graph View ... 510
4.7.3 Graph ... 511
4.7.3.1 Graph Navigation ... 512
4.7.3.1.1 Navigating In Graphs ... 513
4.7.3.1.1.2 Fit Screen ... 515
4.7.3.1.1.3 Full Screen ... 517
4.7.3.1.1.4 Zoom In ... 518
4.7.3.1.1.5 Zoom Out ... 519
4.7.3.1.1.5 Print ... 520
4.7.3.1.1.6 Options ... 521
4.7.3.1.1.8 Subscribe ... 526
4.7.3.2 Impact Graph ... 527
4.7.3.3 Hierarchy Graph ... 530
4.7.4 Details ... 533
4.7.4.1 Navigation ... 534
4.7.4.1.1 Toolbar ... 535
4.7.4.1.1.1 Download ... 536
4.7.4.1.1.2 Preview ... 537
4.7.4.1.1.1 Print ... 545
4.7.4.1.1.4 Subscribe ... 546
4.7.4.2 Attributes ... 547
4.7.4.2.1 Description ... 548
4.7.4.2.2 File Details ... 549
4.7.4.2.3 Responsibilities ... 550
4.7.4.2.5 Documents ... 552
4.7.4.2.6 Versioning ... 554
4.7.4.2.7 Impacts ... 555
4.8 Risk ... 558
4.8.1 Module Overview ... 559
4.8.2 List ... 561
4.8.2.1 Sorting ... 564
4.8.2.2 Filtering ... 566
4.8.2.2.1 Add Filter ... 568
4.8.2.2.2 Remove Filter ... 570

4.8.2.2.3 Combine Filter ... 571
4.8.2.3 Quick Graph View ... 572
4.8.3 Graph ... 574
4.8.3.1 Graph Navigation ... 575
4.8.3.1.1 Navigation In Graphs ... 577
4.8.3.1.1.2 Fit Screen ... 579
4.8.3.1.1.3 Full Screen ... 580
4.8.3.1.1.4 Zoom in ... 581
4.8.3.1.1.5 Zoom Out ... 582
4.8.3.1.1.5 Print ... 583
4.8.3.1.1.7 Settings ... 584
4.8.3.1.1.8 Subscribe ... 585
4.8.3.2 Impact Graph ... 586
4.8.3.3 Hierarchy Graph ... 590
4.8.3.4 Risk Profile Graph ... 593
4.8.4 Details ... 599
4.8.4.1 Navigation ... 600
4.8.4.1.1 Toolbar ... 601
4.8.4.1.1.1 Print ... 602
4.8.4.1.1.4 Subscribe ... 603
4.8.4.2 Attributes ... 604
4.8.4.2.1 Description ... 606
4.8.4.2.2 Risk Profile ... 607
4.8.4.2.2.1 Cause & Effect ... 608
4.8.4.2.2.2 Detectability ... 609
4.8.4.2.3 Controls ... 610
4.8.4.2.4 Micro Risks ... 611
4.8.4.2.5 Documents ... 612
4.8.4.2.6 Responsibilities ... 614
4.8.4.2.7 Properties ... 615
4.8.4.2.8 Impacts ... 616
4.9 Control ... 619
4.9.1 Module Overview ... 620
4.9.2 List ... 622
4.9.2.1 Sorting ... 625
4.9.2.2 Filtering ... 627
4.9.2.2.1 Add Filter ... 629
4.9.2.2.2 Remove Filter ... 631
4.9.2.2.3 Combine Filter ... 632
4.9.2.3 Quick Graph View ... 633
4.9.3 Graph ... 634
4.9.3.1 Graph Navigation ... 635

4.9.3.1.1 Navigation in Graphs 637
4.9.3.1.1.2 Fit Screen 639
4.9.3.1.1.3 Full Screen 640
4.9.3.1.1.4 Zoom in 641
4.9.3.1.1.5 Zoom Out 642
4.9.3.1.1.6 Share 643
4.9.3.1.1.7 Settings 644
4.9.3.1.1.8 Subscribe 645
4.9.3.2 Impact Graph 646
4.9.3.3 Hierarchy Graph 650
4.9.4 Details 653
4.9.4.1 Navigation 654
4.9.4.1.1 Toolbar 655
4.9.4.1.1.1 Print 656
4.9.4.1.1.2 Favorite 657
4.9.4.1.1.3 Share 658
4.9.4.1.1.4 Subscribe 659
4.9.4.2 Attributes 660
4.9.4.2.1 Description 662
4.9.4.2.2 Documents 663
4.9.4.2.3 Risks 665
4.9.4.2.4 Advanced 666
4.9.4.2.5 IT 668
4.9.4.2.6 Financial 669
4.9.4.2.7 Responsibilities 670
4.9.4.2.8 Properties 671
4.9.4.2.9 Impacts 672
4.10 Rule 675
4.10.1 Module Overview 676
4.10.2 List 678
4.10.2.1 Sorting 681
4.10.2.2 Filtering 683
4.10.2.2.1 Add Filter 685
4.10.2.2.2 Remove Filter 687
4.10.2.2.3 Combine Filter 688
4.10.2.3 Quick Graph View 689
4.10.3 Graph 691
4.10.3.1 Graph Navigation 692
4.10.3.1.1 Navigation In Graphs 694
4.10.3.1.1.1 Fit Screen 696
4.10.3.1.1.2 Full Screen 697
4.10.3.1.1.3 Zoom in 698

4.10.3.1.1.4 Zoom Out ... 699
4.10.3.1.1.5 Print ... 700
4.10.3.1.1.6 Settings ... 701
4.10.3.1.1.7 Subscribe ... 702
4.10.3.2 Impact Graph ... 703
4.10.3.3 Hierarchy Graph ... 707
4.10.4 Details ... 710
4.10.4.1 Navigation ... 711
4.10.4.1.1 Toolbar ... 713
4.10.4.1.1.1 Print ... 714
4.10.4.1.1.4 Subscribe ... 715
4.10.4.2 Attributes ... 716
4.10.4.2.1 Description ... 718
4.10.4.2.2 Advanced ... 719
4.10.4.2.3 Responsibilities ... 720
4.10.4.2.4 Risks ... 721
4.10.4.2.5 Rules ... 722
4.10.4.2.6 Documents ... 723
4.10.4.2.7 Properties ... 725
4.10.4.2.8 Impacts ... 726
4.11 Master Data ... 728
4.11.1 Module Overview ... 729
4.11.2 List ... 731
4.11.2.1 Sorting ... 734
4.11.2.2 Filtering ... 736
4.11.2.2.1 Add Filter ... 738
4.11.2.2.2 Remove Filter ... 740
4.11.2.2.3 Combine Filter ... 741
4.11.2.3 Quick Graph View ... 742
4.11.3 Graph ... 744
4.11.3.1 Graph Navigation ... 745
4.11.3.1.1 Navigation In Graphs ... 747
4.11.3.1.1.1 Fit Screen ... 749
4.11.3.1.1.2 Full Screen ... 750
4.11.3.1.1.3 Zoom in ... 751
4.11.3.1.1.4 Zoom Out ... 752
4.11.3.1.1.5 Print ... 753
4.11.3.1.1.6 Settings ... 754
4.11.3.1.1.7 Subscribe ... 755
4.11.3.2 Impact Graph ... 756
4.11.3.3 Hierarchy Graph ... 760
4.11.3.4 Data Diagram ... 763

4.11.4 Details 765
4.11.4.1 Navigation 766
4.11.4.1.1 Toolbar 767
4.11.4.1.1.1 Print 768
4.11.4.1.1.4 Subscribe 769
4.11.4.2 Attributes 770
4.11.4.2.1 Description 772
4.11.4.2.2 Responsibilities 773
4.11.4.2.3 Permission 774
4.11.4.2.4 Documents 775
4.11.4.2.5 Associations 777
4.11.4.2.6 Properties 778
4.11.4.2.7 Impacts 779
4.12 Collaboration 782
4.12.1 Navigation 783
4.12.1.1 Collaboration Module 784
4.12.1.1.1 Sorting 787
4.12.1.1.2 Filtering 789
4.12.1.1.2.1 Add filter 790
4.12.1.1.2.2 Remove Filter 792
4.12.1.1.2.3 Combine Filter 793
4.12.1.2 Item Pages 794
4.12.2 Using Collaboration Features 797
4.12.2.1 Initiating Collaboration 798
4.12.2.2 Participating in Collaboration 806
4.12.2.2.1 Reply 807
4.12.2.2.2 Share 809
4.12.2.2.3 Vote 810
4.12.2.2.4 Close Topic 811
4.12.2.3 Monitoring Collaboration 813
4.12.2.4 Notification and Confirmation 814
4.12.3 Discussion 815
4.12.4 Question 816
4.12.5 Incident 817
4.12.6 Improvement Request 818
4.12.6.1 Approve Improvement Request 820
4.12.6.2 Assign IR Implementer 826
4.12.6.2.1 Delegating Collaboration Request 837
4.12.6.3 Close Improvement Request 839
4.12.6.4 New Revision Update to Review 840
4.13 Governance 841
4.13.1 Overview 843

4.13.2 Maturity ... 845
4.13.3 Analysis ... 848
4.13.3.1 Process Analysis Workbooks ... 851
4.14 Apps Menu ... 854
4.15 Glossary ... 856
4.15.1 Overview ... 857
4.15.2 List ... 858
4.15.2.1 Sorting ... 861
4.15.2.2 Filtering ... 864
4.15.2.2.1 How to Add Filter ... 866
4.15.2.2.2 How to Remove Filter ... 868
4.15.2.2.3 How to Combine Filter ... 869
4.15.3 Details ... 870
4.15.3.1 Navigation ... 871
4.15.3.2 Toolbar ... 873
4.15.3.2.1 Print ... 874
4.15.3.2.2 Subscribe ... 875
4.15.3.2.3 Share ... 876
4.15.3.2.4 Favorite ... 877
4.15.4 Attributes ... 878
4.15.4.1 Description ... 879
4.15.4.1.1 Link-to-Object ... 880
4.15.5 Graph ... 881
4.15.5.1 Graph Navigation ... 882
4.15.5.2 Impact Graph ... 883
4.16 To Do ... 884
4.16.1 Module Overview ... 885
4.16.2 List ... 888
4.16.2.1 Sorting ... 889
4.16.2.2 Filtering ... 891
4.16.2.2.1 Add Filter ... 893
4.16.2.2.2 Remove Filter ... 896
4.16.2.2.3 Combine Filter ... 897
4.17 Capability ... 898
4.17.1 Module Overview ... 899
4.17.2 List ... 902
4.17.2.1 Sorting ... 908
4.17.2.3 Quick Graph View ... 910
4.17.3 Graph ... 912
4.17.3.1 Graph Navigation ... 913
4.17.3.1.1 Navigation in Graphs ... 915
4.17.3.2 Impact Graph ... 917

4.17.3.3 Hierarchy Graph 921
4.17.4 Details 927
4.17.4.1 Toolbar 928
4.17.4.1.1 Print 929
4.17.4.1.2 Favorite 930
4.17.4.1.3 Share 931
4.17.4.1.4 Subscribe 932
4.17.4.2 Attributes 933
4.17.4.2.1 Processes 935
4.17.4.2.2 Responsibilities 937
4.17.4.2.3 Documents 939
4.17.4.2.4 Rules, Regulations & Policies 942
4.17.4.2.5 Risks & Controls 944
4.17.4.2.6 Strategy & Performance 946
4.17.4.2.8 Analysis 948
4.17.4.2.9 Versioning 949
4.17.4.2.10 Impact 950
4.17.5 Search Capabilities 952

5.0 Search 955
5.1 Advanced Search 959

6.0 Notifications 962
6.1 Notification Organization 965
6.2 Enable/Disable Browser Notifications 970
6.2.1 Chrome Notifications 971
6.2.2 Firefox Notifications 972
6.3 Reminders 974

7.0 Approvals, Confirmations and Endorsements 976
7.1 Approval Cycle 977
7.1.1 Notification Emails 983
7.1.2 Show Changes 984
7.1.2.1 Show Changes Since My Last Approval 986
7.1.3 Cognito and Multi-Factor Authentication (MFA) 987
7.1.4 Approval History 988
7.1.5 Delegating Approval 990
7.1.6 Signature Compliance 992
7.1.6.1 Enabling Signature Requirement 993
7.1.6.3 Signature Authentication 997
7.1.6.4 Downloading & Previewing Published Approved Document 999
7.1.6.2 Previewing Document 1002
7.2 Confirmation 1006
7.3 Endorsement Cycle 1007

7.3.1 Sending Endorsement 1011
7.2.1 New Version Confirmation 1012
7.3.2 Participating in An Endorsement Cycle 1014
7.3.3 Notifications Emails 1019
7.3.4 Show Changes 1020
7.3.4.1 Show Changes Since Last Review 1022
7.3.5 Delegating Endorsement 1023
7.3.6 Endorsement History 1025

8.0 My Profile 1026
8.1 General 1029
8.1.1 User Profile Picture 1030
8.1.1.1 Add User Profile Picture 1031
8.1.1.2 Edit User Profile Picture 1036
8.1.1.3 Remove User Profile Picture 1041
8.2 Preferences 1042
8.2.1 Environment 1043
8.2.2 Displayed Content 1045
8.3 Language 1048
8.4 Theme Color Setting 1050
8.5 Authorizations 1053
8.6 Default Font Color 1054
8.7 Signature 1058
8.7.1 Add Signature 1059
8.7.2 Remove Signature 1064

9.0 Environment Admin 1065
9.1 Environment Settings 1066
9.1.1 General 1068
9.1.1.1 Theme Color 1069
9.1.1.2 Default Font Color (Environment) 1072
9.1.1.3 Locked Objects – Unlock 1074
9.1.1.4 Comment Settings 1076
9.1.1.5 Document PDF Preview 1078
9.1.2 Search Index 1079
9.1.3 Language 1082
9.1.4 Archive 1083
9.1.4.1 Restore Deleted Objects 1084
9.1.4.1.1 Restore to New Parents 1087
9.1.5 Google Analytics 1090
9.1.5.1 Setting Up Google Analytics 1092
9.1.6 Module Security 1094
9.1.7 Process display preference 1096

9.2 Environment Defaults 1098
9.2.1 Home Page Widgets 1099
9.2.2 Process Map Graph Options 1100
9.2.3 Impact Graph Options 1102
9.2.4 List View Column Configuration 1104

10.0 System Admin 1108
10.1 General 1110
10.1.1 Theme Settings 1111
10.1.3 Manage EPC Sessions 1116
10.1.3.1 Sorting 1117
10.1.3.2 Filtering 1119
10.1.3.2.1 Add Filter 1120
10.1.3.2.2 Remove Filter 1121
10.1.3.2.3 Combine Filter 1122
10.1.3.3 Closing 1123
10.1.4 Default Environment 1124
10.1.5 Default Font Color (System) 1125
10.2 Environment 1128
10.2.1 Add Environment 1129
10.2.2 Edit Existing Environment 1131
10.2.3 Delete Environment 1134
10.2.4 Add Group to Environment 1135
10.2.5 Add User to Environment 1141
10.2.6 Set Environment Security 1147
10.2.7 Sort Environment Table 1151
10.2.8 Filter Environment Table 1153
10.2.8.1 Add Filter 1154
10.2.8.2 Remove Filter 1156
10.2.9 Environment Purge 1157
10.3 Users 1159
10.3.1 Add User 1160
10.3.1.2 Add Cognito User 1164
10.3.2 Edit Existing User 1165
10.3.3 Delete User 1171
10.3.4 Add User to Group 1172
10.3.5 Add User to Environment 1178
10.3.6 Set User Security 1185
10.3.7 Sort User Table 1189
10.3.8 Filter User Table 1191
10.3.8.1 Add Filter 1192
10.3.8.2 Remove Filter 1194
10.3.8.3 Combine Filter 1195

10.3.9 Synchronize with Active Directory 1196
10.3.10 User Authorizations 1199
10.4 Groups 1200
10.4.1 Add Group 1201
10.4.2 Edit Existing Group 1203
10.4.3 Delete Group 1207
10.4.4 Add User to Group 1208
10.4.5 Add Environment to Group 1213
10.4.6 Set Group Security 1219
10.4.7 Sort Group Table 1223
10.4.8 Filter Group Table 1225
10.4.8.1 Add Filter 1226
10.4.8.2 Remove Filter 1228
10.4.8.3 Combine Filter 1229
10.5 Search 1230
10.6 Localization 1234
10.6.1 Manage Languages 1235
10.6.2 Apply New Languages 1236
10.6.2.1 Understanding Content Languages 1237
10.6.2.2 Add New Languages 1239
10.6.2.3 Remove Languages 1243
10.6.2.4 Reorder Languages 1244
10.6.3 Localization Values 1245
10.7 Risk 1246
10.7.1 Edit Risk Language 1248
10.7.2 Risk Priority Settings 1249
10.7.2.1 Edit Risk Priority 1250
10.7.2.1.1 Edit Priority Name 1251
10.7.2.1.2 Edit Priority Description 1255
10.7.2.1.3 Edit Risk Priority Color 1259
10.7.2.2 Edit Risk Priority Language 1266
10.7.3 Risk Matrix Settings 1271
10.7.3.1 Edit Risk Matrix 1272
10.7.3.1.1 Edit Risk Likelihood 1273
10.7.3.1.1.1 Edit Risk Likelihood Name 1274
10.7.3.1.1.2 Edit Risk Likelihood Description 1278
10.7.3.1.2 Edit Risk Impact 1282
10.7.3.1.2.1 Edit Risk Impact Name 1283
10.7.3.1.2.2 Edit Risk Impact Description 1287
10.7.3.1.3 Edit Risk Profile 1291
10.7.3.1.3.1 Edit Risk Profile Priority 1292
10.7.3.1.3.2 Edit Risk Profile Score 1298

10.7.3.2 Edit Risk Matrix Language 1303
10.7.3.2.1 Edit Risk Likelihood Language 1304
10.7.3.2.2 Edit Risk Impact Language 1310
10.7.3.2.3 Edit Risk Profile Language 1316
10.8 Attributes 1321
10.8.1 Content Language 1322
10.8.2 Object Types 1324
10.8.2.1 Add Object Type 1325
10.8.2.2 Edit Object Type 1328
10.8.2.3 Delete Object Type 1330
10.8.2.4 Search for Object Types 1331
10.8.3 Categories 1333
10.8.3.1 Add Category 1334
10.8.3.2 Edit Category 1336
10.8.3.3 Delete Category 1339
10.8.3.4 Search for Categories 1340
10.8.4 Attributes 1341
10.8.4.2 Edit Attribute 1342
10.8.4.3 Delete Attribute 1346
10.8.4.4 Search for Attributes 1347
10.8.4.1 Add Attribute 1348
10.8.5 Assignment Type 1352
10.9 Advanced 1354
10.9.1 Edit Settings 1358
10.9.1.1 Edit EPC Menu 1360
10.9.1.1.1 Add New Home Pages 1361
10.9.1.1.2 Add App Links 1363
10.9.1.2 Enable Flowchart Mapping 1365
10.9.1.3 Data Association Harmonization 1366
10.9.1.4 Enable Cognito 1368
10.9.1.5 Session Timeout Settings 1369
10.10 Home Page Widgets 1371
10.11 Graph 1373
10.12 Mobile App 1376

11.0 Icons and Glossary 1378
11.1 Icons 1379
11.1.1 Navigation Icons 1380
11.1.2 In-Graph Icons 1382
11.1.3 Toolbar Icons 1384
11.2 Glossary (Key Terms) 1385

12.0 Editing on the Web App 1390

12.1 General Edit 1391
12.1.1 WebApp Editing Rules 1392
12.1.1.1 Who Can Edit on the WebApp? 1393
12.1.1.2 Web Edit Vs. Modeler 1394
12.1.1.3 Editing Language 1395
12.1.1.4 Edit Lock 1403
12.1.1.4.1 Lock – Process Editing 1404
12.1.2 Create 1407
12.1.2.1 Create Sets 1408
12.1.2.2 Create Folders 1414
12.1.2.2.1 Create Folders – New Button 1415
12.1.2.2.2 Create Folders – Object Details Tab 1422
12.1.2.3 Create Objects 1428
12.1.2.3.1 Create Objects – New Button 1429
12.1.2.3.2 Create Objects – Object Details Tab 1434
12.1.3 Edit Toolbar 1439
12.1.3.1 Print 1440
12.1.3.2 Subscribe 1441
12.1.3.3 New 1442
12.1.3.4 Edit 1445
12.1.3.5 Approval 1448
12.1.3.6 Security 1456
12.1.3.7 Merge 1464
12.1.3.8 Move 1470
12.1.3.9 Delete 1473
12.1.3.10 Publish 1477
12.1.3.11 Displayed Content 1482
12.1.3.12 Tools 1487
12.1.3.12.1 Audit Trail 1488
12.1.3.12.2 Analysis Report 1490
12.1.3.12.3 Compare Versions 1493
12.1.3.12.4 Localization 1495
12.1.3.12.5 References 1498
12.1.3.12.7 Show Changes 1505
12.1.3.12.8 Browse Versions 1507
12.1.3.12.8.1 Revert Version 1509
12.1.3.12.9 Simulation 1511
12.1.3.12.10 EPC Simulator Features 1515
12.1.3.12.10.1 Simulation Results 1516
12.1.3.12.10.2 Simulation Parameters 1521
12.1.3.13 Object Book Generation 1525
12.1.3.13.1 Differentiation Between Generate Book vs Generate from Template 1528

12.1.3.14 Copy (and Paste) Existing Objects 1532
12.1.3.15 Endorsement 1536
12.1.3.16 One resource of a Role Endorses / Approves 1542
12.1.4 Import/Export Content 1550
12.1.4.1 Import/Export EPC Content 1551
12.1.4.1.1 Import EPC Content 1552
12.1.4.1.2 Export EPC Content 1556
12.1.4.1.2.1 Export EPC Environment 1557
12.1.4.1.2.2 Export EPC Objects 1560
12.1.4.1.3 Multi-Language Support in EPC 1564
12.1.4.2 Import/Export Visio Content 1565
12.1.4.2.1 Import Visio Content 1566
12.1.4.2.1.1 Import from Visio Rules 1571
12.1.4.2.2 Export Visio Content 1573
12.1.4.3 Import/Export BPMN Content 1578
12.1.4.3.1 Import BPMN Content 1579
12.1.4.3.2 Export BPMN Content 1583
12.1.4.4 Import Master Data Content 1587
12.1.4.4.1 CSV File Format 1591
12.1.4.4.2 Using SQL Server Management Studio 1592
12.1.4.4.3 Using DBVisualizer 1594
12.1.4.5 Import/Export Excel Content 1598
12.1.4.5.1 Import Excel Content 1599
12.1.4.5.1.1 Import Excel – Overwrite 1604
12.1.4.5.1.2 Troubleshooting an Excel Import 1605
12.1.4.5.1.3 Excel Spreadsheet Format 1609
12.1.4.5.1.3.1 Object Details – Document 1612
12.1.4.5.1.3.2 Object Details – Control 1613
12.1.4.5.1.3.3 Object Details – Process 1616
12.1.4.5.1.3.4 Object Details – Flow Object 1618
12.1.4.5.1.3.5 Object Details – Risks 1621
12.1.4.5.2 Export Excel Content 1622
12.1.5 Associations 1626
12.1.5.1 Assign Responsibilities (RASCI-VS) 1627
12.1.5.2 Associate Documents 1633
12.1.5.3 Associate Performance 1637
12.1.5.4 Associate Business Rules 1642
12.1.5.5 Associate Risks 1646
12.1.5.5.1 Associate Risks to Processes 1650
12.1.5.5.1.1 Override Residual Risk Scores (on Processes) 1651
12.1.5.5.1.2 Exclude Controls (on Processes) 1652
12.1.5.6 Associate Controls 1653

12.1.5.7 Assign Parent 1657
12.1.5.8 Associate Master Data Objects 1658
12.1.6 Properties 1660
12.1.6.1 Object Type 1661
12.1.6.2 Object Categories 1663
12.1.6.3 Object Attributes 1665
12.1.6.4 Data Harmonization 1674
12.1.6.4.1 Out of Sync 1676
12.1.6.4.2 List of Changes 1679
12.1.6.4.2.1 Synchronize 1680
12.1.6.4.2.2 Create Improvement Request 1681
12.1.7 Content Translation 1683
12.1.8 Tree Selector (Editing) 1685
12.1.8.1 Tree selector (Tree Editing) – Create objects 1687
12.1.8.2 Tree selector (Tree Editing) – Edit Objects 1694
12.1.8.3 Tree selector (Tree Editing) – Delete objects 1697
12.1.9 List View 1700
12.1.9.1 Adding Columns 1701
12.1.9.2 Removing Columns 1703
12.1.9.3 Ordering Columns 1705
12.1.9.4 Saving Columns 1707
12.1.9.4.1 Saving Columns As Environment Default 1709
12.1.9.5 Reset Columns to Default 1713
12.1.9.6 Filtering Columns 1715
12.1.9.7 Export to Excel (Current Fields) 1717
12.1.9.8 Mass Editing 1719
12.1.9.8.1 Mass Publish 1720
12.1.9.8.2 Mass Edit Responsibility 1722
12.1.9.8.3 Mass Subscribe/Unsubscribe 1726
12.1.9.8.4 Mass Collaboration 1729
12.1.9.8.5 Mass Delete 1731
12.1.9.8.6 Mass Favorite/Unfavorite 1733
12.1.9.8.7 Mass Move 1736
12.1.9.8.8 Mass Custom Attributes 1738
12.1.9.9 Mass Edit 1740
12.1.9.9.1 Control 1742
12.1.9.9.2 Rule 1744
12.1.9.9.3 Document 1746
12.1.9.9.4 Risk 1748
12.1.9.9.5 Master Data 1750
12.1.9.9.6 Performance 1752
12.1.9.9.7 Categories 1754

12.1.9.9.8 Properties 1756
12.1.9.9.9 Capability(General & Properties) 1757
12.1.10 Rich Text Editor 1759
12.1.11 Right Click Actions 1762
12.1.11.1 Right Click Actions – Create Objects 1764
12.1.11.2 Right Click Actions – Move Objects 1766
12.1.11.3 Right Click Actions – Copy Objects 1768
12.1.11.4 Right Click Actions – Delete Objects 1769
12.1.11.5 Right Click Actions – Edit Objects 1771
12.2 Process Edit 1773
12.2.1 Create Process Objects 1774
12.2.1.1 Create a Process Set 1775
12.2.1.1.2 Create a Process – New Button 1776
12.2.1.1.2.1 Create a Process – Tree 1783
12.2.1.1.3 Create a Process – Details Tab 1785
12.2.1.1.3.1 Create Flow Objects – Details Tab 1793
12.2.2 Edit Process Graph 1796
12.2.2.1 Graph Edit Mode 1797
12.2.2.1.1 Edit Button for Graph 1798
12.2.2.1.2 Graph Toolbar 1801
12.2.2.1.2.1 Cut 1803
12.2.2.1.2.2 Copy 1805
12.2.2.1.2.3 Paste 1807
12.2.2.1.2.4 Delete 1809
12.2.2.1.2.5 Fit Screen 1812
12.2.2.1.2.6 Zoom In 1815
12.2.2.1.2.7 Zoom Out 1817
12.2.2.1.2.8 Auto Layout 1819
12.2.2.1.2.9 Save 1821
12.2.2.1.2.10 Save & Close 1823
12.2.2.1.2.11 Discard Changes 1825
12.2.2.1.2.12 Last Save 1827
12.2.2.1.2.13 Undo 1828
12.2.2.1.2.14 Redo 1829
12.2.2.1.2.15 Text 1830
12.2.2.1.2.16 Set Colors 1831
12.2.2.1.2.17 Map Page-Break Canvas 1834
12.2.2.2 Map a Process 1837
12.2.2.2.1 Add Shapes 1839
12.2.2.2.1.1 Quick Shape Mapping 1841
12.2.2.2.2 Edit Shapes Name 1843
12.2.2.2.3 Connect Shapes 1845

12.2.2.2.4 Resize Shapes 1850
12.2.2.2.5 Multi-Select Shapes 1852
12.2.2.2.6 Move Shapes 1855
12.2.2.2.7 Move a Process Map 1861
12.2.2.2.8 Reroute a Flow 1865
12.2.2.2.8.1 Manually Re-Route Process Flows 1866
12.2.2.2.8.2 Auto-Layout Process and Flows 1877
12.2.2.2.8.3 Auto Re-Route Feature 1878
12.2.2.2.9 Delete Shapes and Flows 1879
12.2.2.2.10 Associate Objects to Shapes 1881
12.2.2.2.10.1 Associate Documents to Artifacts 1882
12.2.2.2.10.2 Associate Assets to Data Stores 1888
12.2.2.2.11 Add Node Colors 1893
12.2.2.2.12 Mapping with Flowchart Shapes 1896
12.2.2.2.13 Assign Existing Object (Shortcut) 1901
12.2.2.2.13.1 Assign Existing Process (Process Shortcut) 1903
12.2.2.2.13.2 Assign Existing Task (Task Shortcut) 1906
12.2.2.2.14 Saving Annotation Locations 1909
12.2.2.3 Annotations 1911
12.2.2.4 Boundary Events 1918
12.2.2.4.1 Add Boundary Events 1919
12.2.2.4.2 Edit boundary events 1921
12.2.2.4.3 Remove Boundary Events 1926
12.2.2.5 BPMN Properties 1928
12.2.2.5.1 Sub-Process 1931
12.2.2.5.2 Task 1936
12.2.2.5.3 Gateway 1942
12.2.2.5.4 Event 1945
12.2.2.5.5 Transition 1950
12.2.2.6 IPLs 1953
12.2.2.7 Edit Details 1959
12.2.2.7.1 Edit Shape Details 1960
12.2.2.7.2 Edit Process Details 1963
12.2.2.8 Inputs and Outputs 1967
12.2.2.8.1 Tree selector – Unclassified Inputs and Outputs 1977
12.2.2.8.2 Tree selector – Create Inputs and Ouputs 1979
12.2.2.8.3 Tree selector – Delete Inputs and Outputs 1985
12.2.2.8.4 Tree selector – Merge Inputs and Outputs 1988
12.2.2.8.5 Tree selector – Plus “+” button 1992
12.2.2.9 Edit Responsibilities From Graph Edit 1996
12.2.2.10 Auto-Sequence 2001
12.2.2.11 Swimlane 2003

12.2.2.11.1 Display 2004
12.2.2.11.2 New lane added automatically 2005
12.2.2.11.3 Rules of the RASCI “R” 2007
12.2.3 Edit Process Objects 2009
12.2.3.1 Edit Process General Details 2010
12.2.3.2 Edit Process Objects Properties Details 2012
12.2.3.3 Edit Process Flow Objects Details 2018
12.2.3.3.1 Edit Flow Object General Details 2021
12.2.3.3.2 Edit Flow Objects Properties Detail 2024
12.2.4 Delete Process Objects 2027
12.2.5 Publish Process Objects 2028
12.2.6 Process Approval Cycle 2029
12.2.7 Process Security 2030
12.2.8 Move Process Objects 2031
12.2.9 Generating a Process Book 2032
12.2.10 Process Object Endorsement Cycle 2035
12.3 Performance Edit 2036
12.3.1 Create Performance Objects 2037
12.3.1.1 Create a Performance Set 2038
12.3.1.2 Create an Objective 2039
12.3.1.3 Create an Indicator 2043
12.3.2 Edit Performance Objects 2048
12.3.2.1 Edit Objective General Details 2049
12.3.2.2 Edit Performance Indicator General Details 2051
12.3.2.3 Edit Performance Objects Properties Details 2055
12.3.3 Delete Performance Objects 2056
12.3.4 Publish Performance Objects 2057
12.3.5 Performance Objects Approval Cycle 2058
12.3.6 Performance Objects Security 2059
12.3.7 Move Performance Objects 2060
12.3.8 Merge Performance Objects 2061
12.3.9 Generate Performance Books 2063
12.3.10 Performance Object Endorsement Cycle 2064
12.4 Organization Edit 2065
12.4.1 Create Organization Objects 2066
12.4.1.1 Create an Organization Unit Set 2067
12.4.1.2 Create an Organization Unit 2068
12.4.1.4 Create a Role 2072
12.4.1.5 Create an Asset 2076
12.4.1.8 Import Users as Resources 2080
12.4.2 Edit Organization Objects 2085
12.4.2.1 Edit Organization Unit General Details 2086

12.4.2.2 Edit Role General Details 2088
12.4.2.3 Edit Asset General Details 2090
12.4.2.4 Edit Resource General Details 2092
12.4.2.5 Edit Organization Objects Properties Details 2095
12.4.2.6 Edit Asset Properties Detail 2097
12.4.3 Delete Organization Objects 2102
12.4.4 Publish Organization Objects 2103
12.4.5 Organization Objects Approval Cycle 2104
12.4.6 Organization Objects Security 2105
12.4.7 Move Organization Objects 2106
12.4.8 Merge Organizational Objects 2107
12.4.9 Generate Organization Books 2109
12.4.10 Organization Object Endorsement Cycle 2110
12.5 Documents Edit 2111
12.5.1 Create Document Objects 2112
12.5.1.1 Create a Document Set 2113
12.5.1.2 Create a Document Folder 2114
12.5.1.3 Create a Document 2115
12.5.1.3.1 Uploading Multiple Documents (Mass Upload) 2121
12.5.1.3.2 Compatible Document Types 2122
12.5.1.3.3 Generated from Template 2123
12.5.1.4 Creating a Template 2127
12.5.1.4.1 Template Syntax 2129
12.5.1.4.2 EPC Tag Structure 2132
12.5.1.4.3 Cover Pages 2136
12.5.1.4.4 Custom Document Tags 2139
12.5.1.4.4.1 General Object Tags 2142
12.5.1.4.4.2 Process Book Tags 2161
12.5.1.4.4.3 Flow Object Tags 2164
12.5.1.4.4.4 Organization Book Tags 2168
12.5.1.4.4.5 Performance Book Tags 2170
12.5.1.4.4.6 Document Book Tags 2171
12.5.1.4.4.7 Risk Book Tags 2172
12.5.1.4.4.8 Control Book Tags 2174
12.5.1.4.4.9 Rule Book Tags 2176
12.5.1.4.4.10 Master Data Book Tags 2177
12.5.1.4.4.11 Template Document Tags 2180
12.5.1.4.4.12 Generated from Template Tags 2181
12.5.1.4.5 Template FAQs 2183
12.5.1.4.6 Obtaining Payloads for Template Building 2186
12.5.1.4.7 Custom Object Book Templates 2191
12.5.2 Edit Document Objects 2192

12.5.2.1 Edit Document General Details 2193
12.5.2.2 Edit Document Properties Details 2198
12.5.3 Delete Document Objects 2199
12.5.4 Publish Document Objects 2200
12.5.5 Document Objects Approval Cycle 2201
12.5.6 Document Objects Security 2202
12.5.7 Move Document Objects 2203
12.5.8 Merge Document Objects 2204
12.5.9 Generate Document Books 2205
12.5.10 Document Object Endorsement Cycle 2206
12.6 Risk Edit 2207
12.6.1 Create Risk Objects 2208
12.6.1.1 Create a Risk Set 2209
12.6.1.2 Create a Risk Folder 2210
12.6.1.3 Create a Risk 2211
12.6.2 Edit Risk Objects 2216
12.6.2.1 Edit Risk General Details 2217
12.6.2.2 Risk Analysis 2219
12.6.2.2.1 Edit Causes & Effects 2220
12.6.1.3.1.2 Edit Gross Risk 2221
12.6.1.3.1.3 Edit Residual Risk 2225
12.6.1.3.1.4 Assign Controls to Risks 2227
12.6.1.3.1.5 Residual Risk Override 2231
12.6.2.3 Edit Risk Properties Details 2234
12.6.3 Delete Risk Objects 2235
12.6.4 Publish Risk Objects 2236
12.6.5 Risk Objects Approval Cycle 2237
12.6.6 Risk Objects Security 2238
12.6.7 Move Risk Objects 2239
12.6.8 Merge Risk Objects 2240
12.6.9 Generate Risk Book 2242
12.6.10 Risk Object Endorsement Cycle 2243
12.7 Control Edit 2244
12.7.1 Create Control Objects 2245
12.7.1.1 Create a Control Set 2246
12.7.1.2 Create a Control Folder 2247
12.7.1.3 Create a Control 2248
12.7.2 Edit Control Objects 2252
12.7.2.1 Edit Control General Details 2253
12.7.2.2 Edit Control Properties Details 2259
12.7.3 Delete Control Objects 2260
12.7.4 Publish Control Objects 2261

12.7.5 Control Objects Approval Cycle 2262
12.7.6 Control Objects Security 2263
12.7.7 Move Control Objects 2264
12.7.8 Merge Control Objects 2266
12.7.9 Generate Control Books 2268
12.7.10 Control Object Endorsement Cycle 2269
12.8 Rule Edit 2270
12.8.1 Create Rule Objects 2271
12.8.1.1 Create a Rule Set 2272
12.8.1.2 Create a Rule Folder 2273
12.8.1.3 Create a Rule 2274
12.8.2 Edit Rule Objects 2278
12.8.2.1 Edit Rule General Details 2279
12.8.2.2 Edit Rule Properties Details 2282
12.8.3 Delete Rule Objects 2283
12.8.4 Publish Rule Objects 2284
12.8.5 Rule Objects Approval Cycle 2285
12.8.6 Rule Objects Security 2286
12.8.7 Move Rule Objects 2287
12.8.8 Merge Rule Objects 2288
12.8.9 Generate Rule Books 2290
12.8.10 Rule Objects Endorsement Cycle 2291
12.8.11 Assign To 2292
12.9 Master Data Edit 2298
12.9.1 Create Master Data Objects 2299
12.9.1.1 Create a Master Data Set 2300
12.9.1.2 Create a Master Data Folder 2301
12.9.1.3 Create an Entity 2302
12.9.1.4 Create an Attribute 2306
12.9.2 Edit Master Data Objects 2309
12.9.2.1 Edit Entity General Details 2310
12.9.2.2 Edit Attribute General Details 2314
12.9.2.3 Edit Master Data Objects Properties Details 2317
12.9.3 Delete Master Data Objects 2318
12.9.4 Publish Master Data Objects 2319
12.9.5 Master Data Objects Approval Cycle 2320
12.9.6 Master Data Objects Security 2321
12.9.7 Move Master Data Objects 2322
12.9.8 Merge Master Data Objects 2324
12.9.9 Generate Master Data Books 2326
12.9.10 Master Data Object Endorsement Cycle 2327
12.10 Collaboration Edit 2328

12.10.1 Implement Improvement Requests 2329
12.11 Governance Edit 2339
12.11.1 Overview Tab 2341
12.11.2 Maturity Tab 2344
12.11.3 Analysis Tab 2346
12.11.3.1 Process Analysis 2349
12.11.3.1.1 General Process Analysis Report 2350
12.13 Capability Edit 2355
12.13.1 Create Capability Objects 2356
12.13.1.1 Create Capability Set 2357
12.13.2.5 Copy/paste Capability Objects 2358

13.0 Parser 2360
13.1 Upload a document 2361
13.2 Template selection/creation 2362
13.3 Parsing 2363
13.3.1 Manual Tagging 2364
13.3.2 Auto Tagging 2369
13.3.3 Rule Selection 2373
13.3.4 Parsing Feature 2374
13.4 Rule Builder 2377
13.5 Export 2385
13.5.1 Export Settings 2386
13.5.2 Environment & Language 2388

14.0 Middleware Bi-Directional Integration Sync Manager 2389
14.1 Atlassian Jira Two-way Integration 2390
14.1.1 Creating a Jira Epic and Story From EPC 2391
14.2 Essential Projects Two-way Integration 2394
14.2.1 Creating an EA Solution From EPC 2395

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

Need live chat assistance? Click here

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

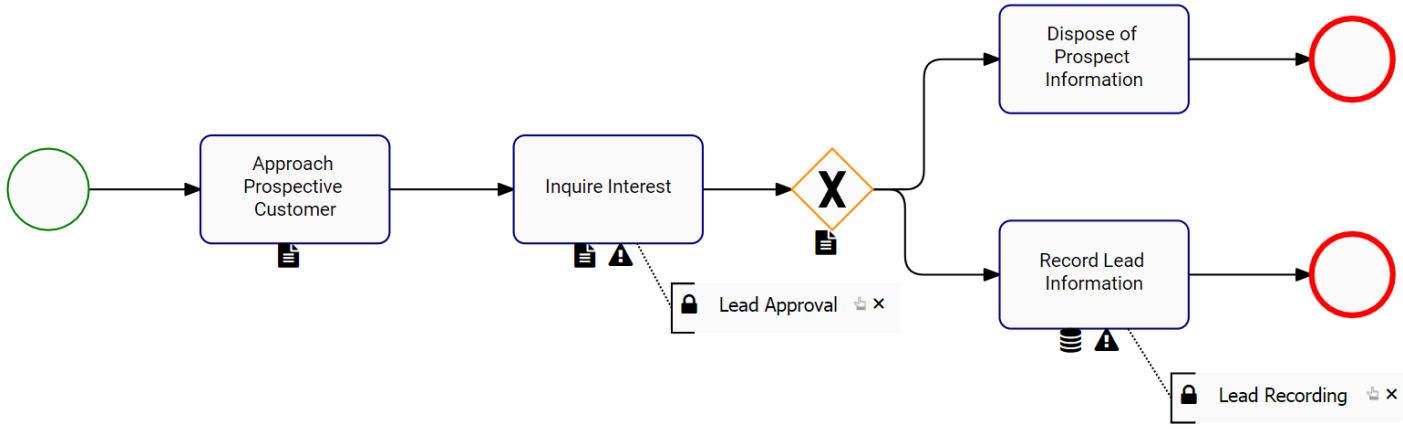
Accessed initially as a list view, the EPC Web App allows users to view their business processes in a customizable and color coded environments. These views have various view-specific options that the user can define to display the process in a way that best suits them. For example: content, or objects, 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**

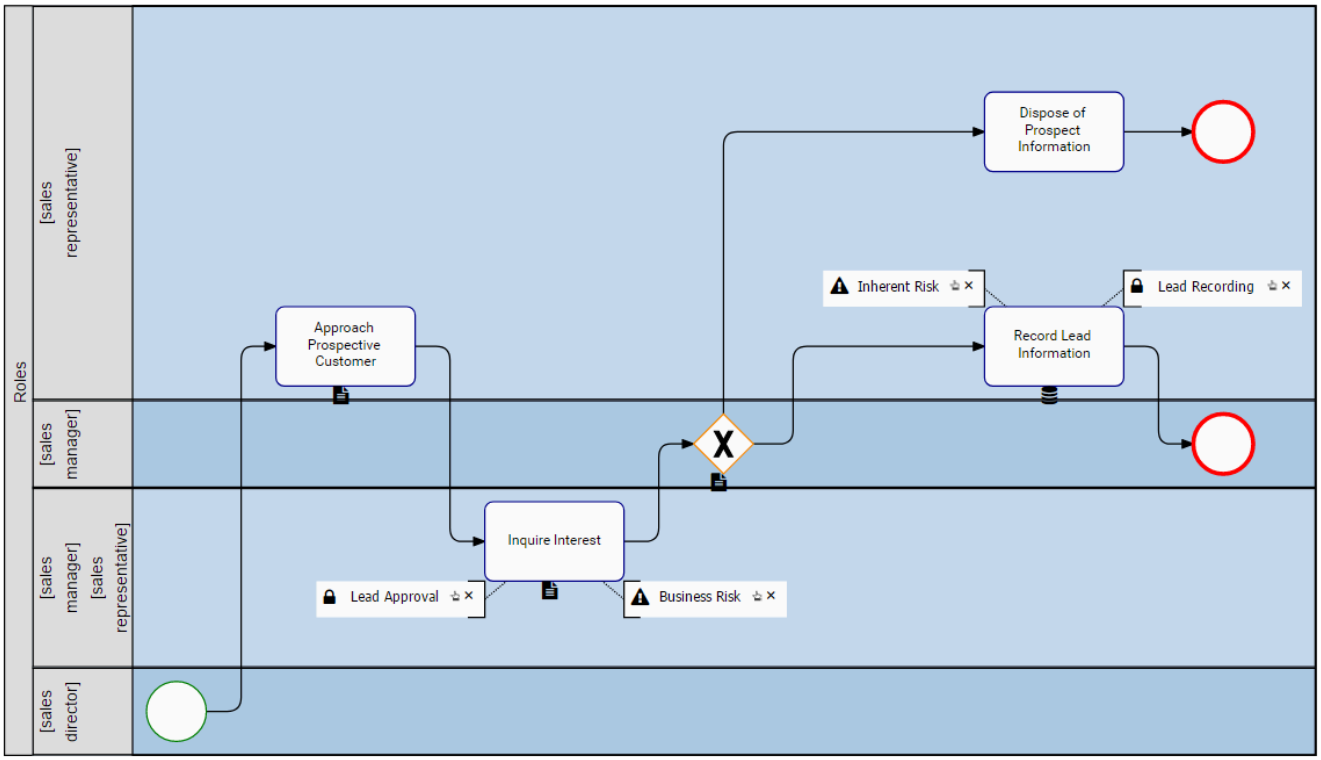
A1	B1	C1	D1
A2	B2	C2	D2
A3	B3	C3	D3
A4	B4	C4	D4
A4	B4	C4	D4

Graph View

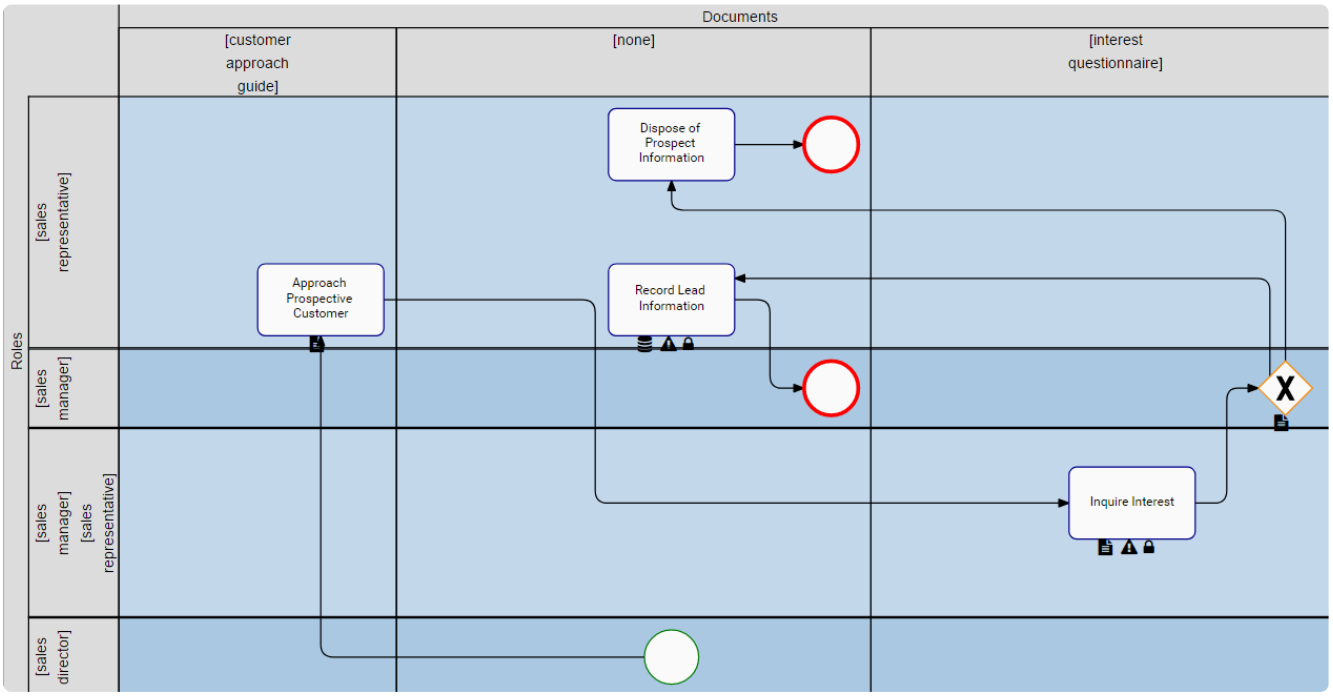
Graph View



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

© 2020 Interfacing Technologies Corporation

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 (KCIs) and Key Risk Indicators (KRIs) at all levels and by process so that a proactive approach to correcting issues before they arise may be taken.. By setting desired targets, it becomes easy to quantify how far away teams are from reaching their goals. Assigning measurable targets allows all levels of employees to understand expectations manage activities and monitor performance throughout the life cycle of different processes in real time.
Fundamentally this generates Operational Intelligence throughout an organization, facilitated by the following elements enabled by the EPC:

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

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

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

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

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

Further details can be found in section 4.5.

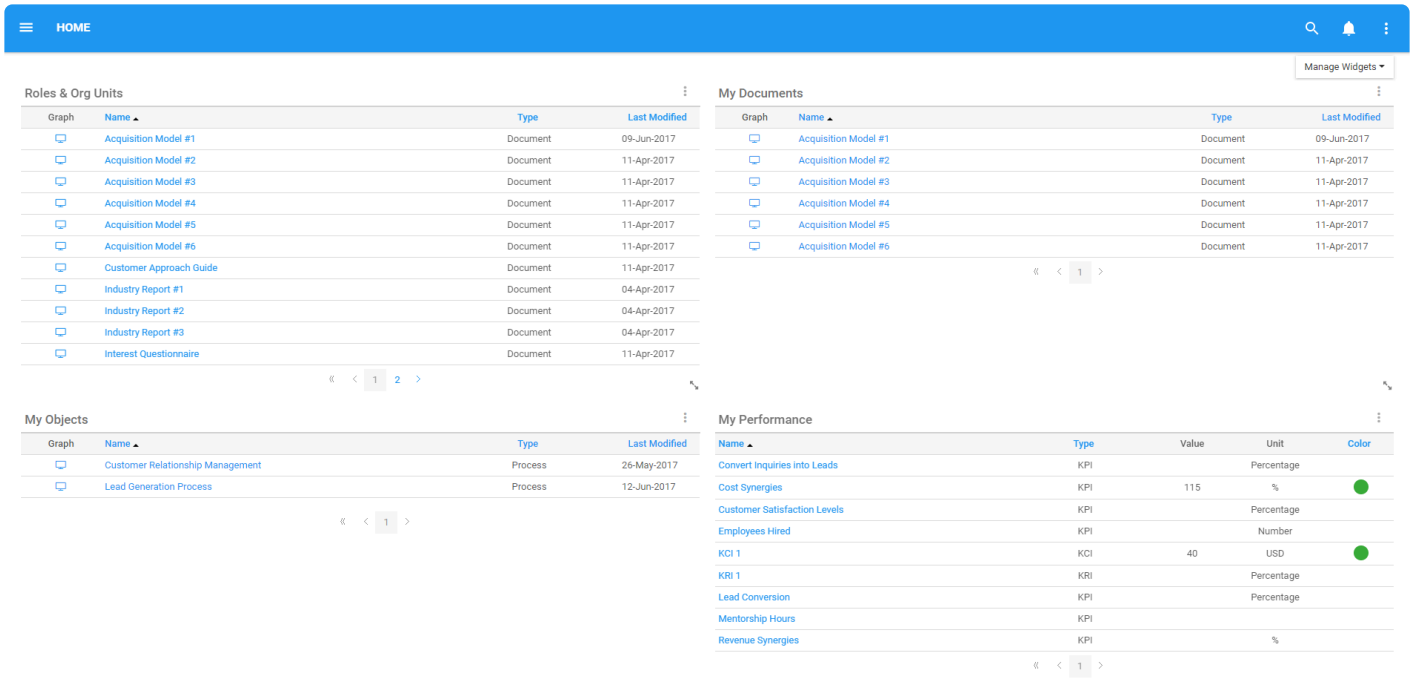
2.0 EPC 13.0 New Features and Functions

Check out the 13.0 Release Notes to see the new features and functions added to this version by clicking here!

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.



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.

© 2020 Interfacing Technologies Corporation

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.

© 2020 Interfacing Technologies Corporation

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.

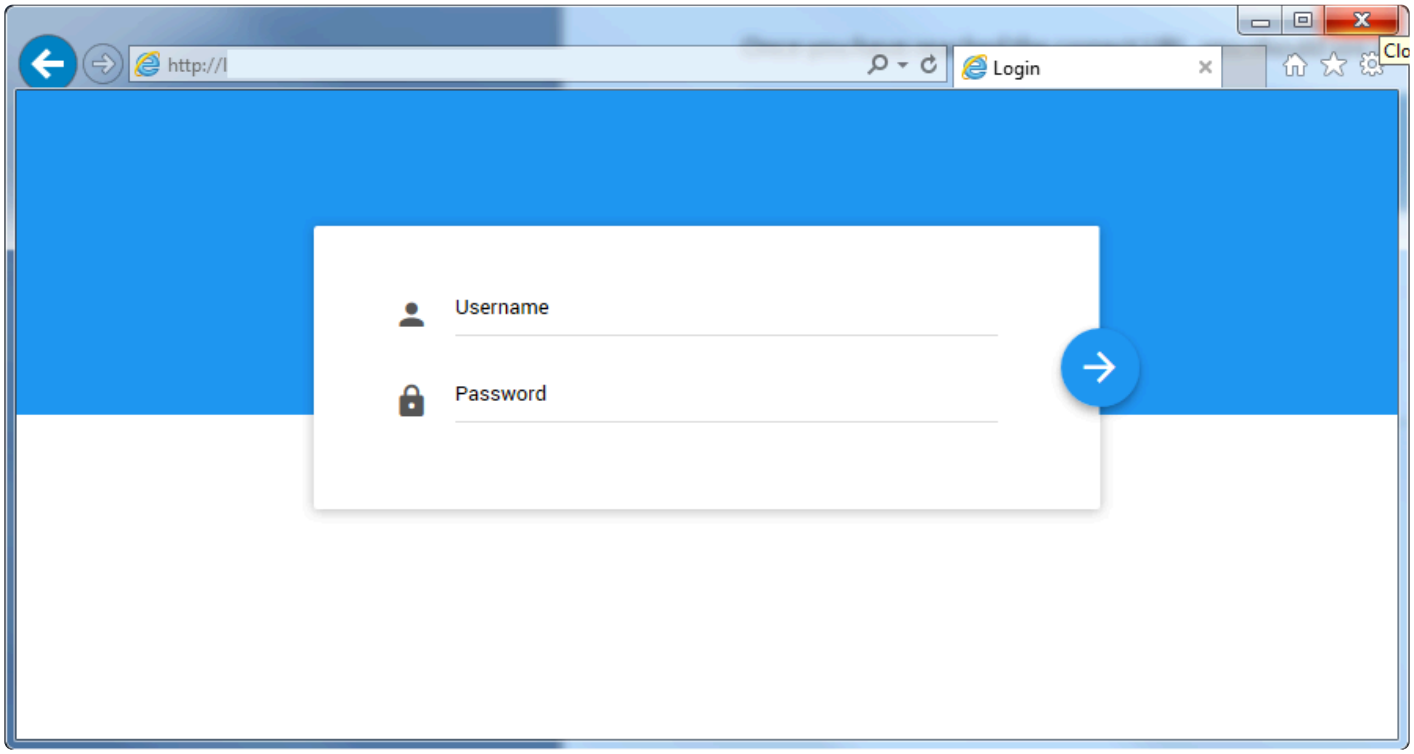
Below is listed the following features that will be covered in the navigation section:

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

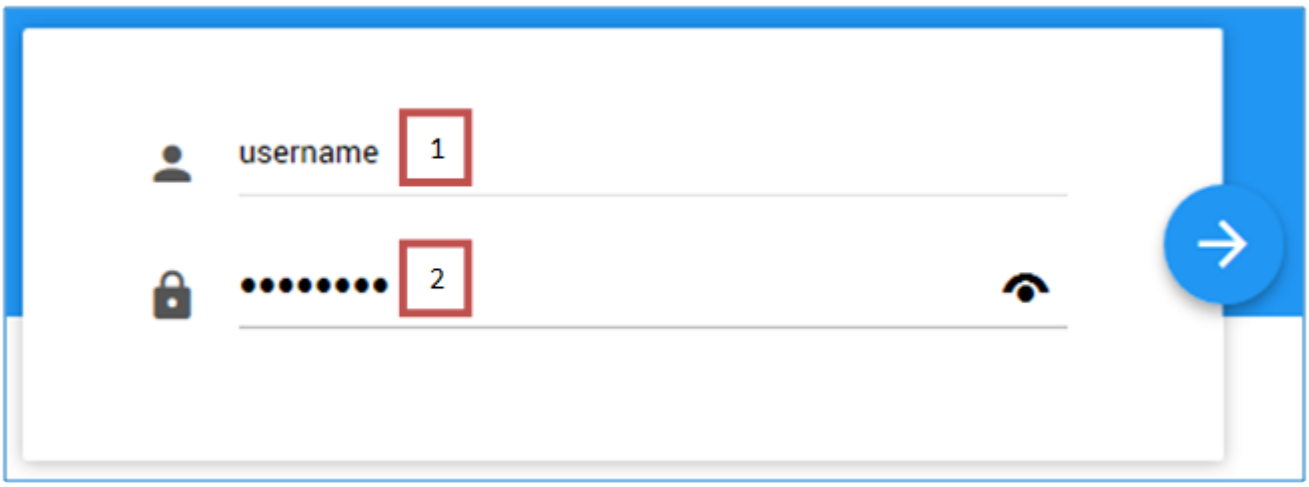
Logging in is the entry point for the EPC Web App.

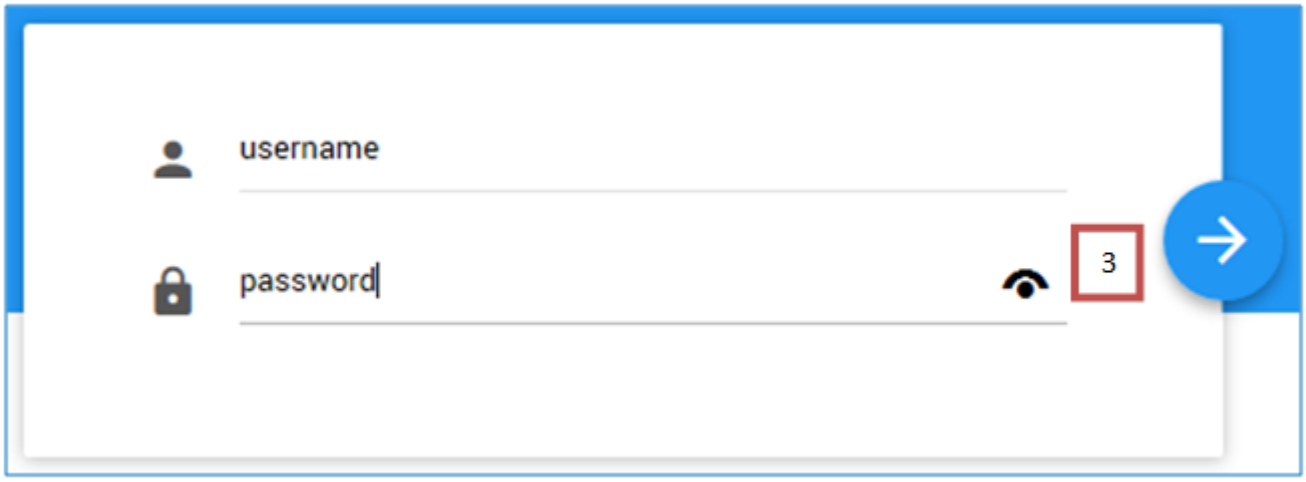
1. To access the login page for EPC 10, you must type the corresponding URL in your preferred browser. This URL is company specific. Therefore you must contact an EPC administrator to obtain the correct URL.
2. Once you have reached the correct URL, you should see a login page as show below.
3. Enter 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.


username
1
2


username
password
3

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.

4.1.2 Cognito Login

Clients can opt to sign in using Cognito. Amazon Cognito provides authentication, authorization and user management for the EPC. This option must be enabled by System Administrators. Please contact your System Administrator for further details.

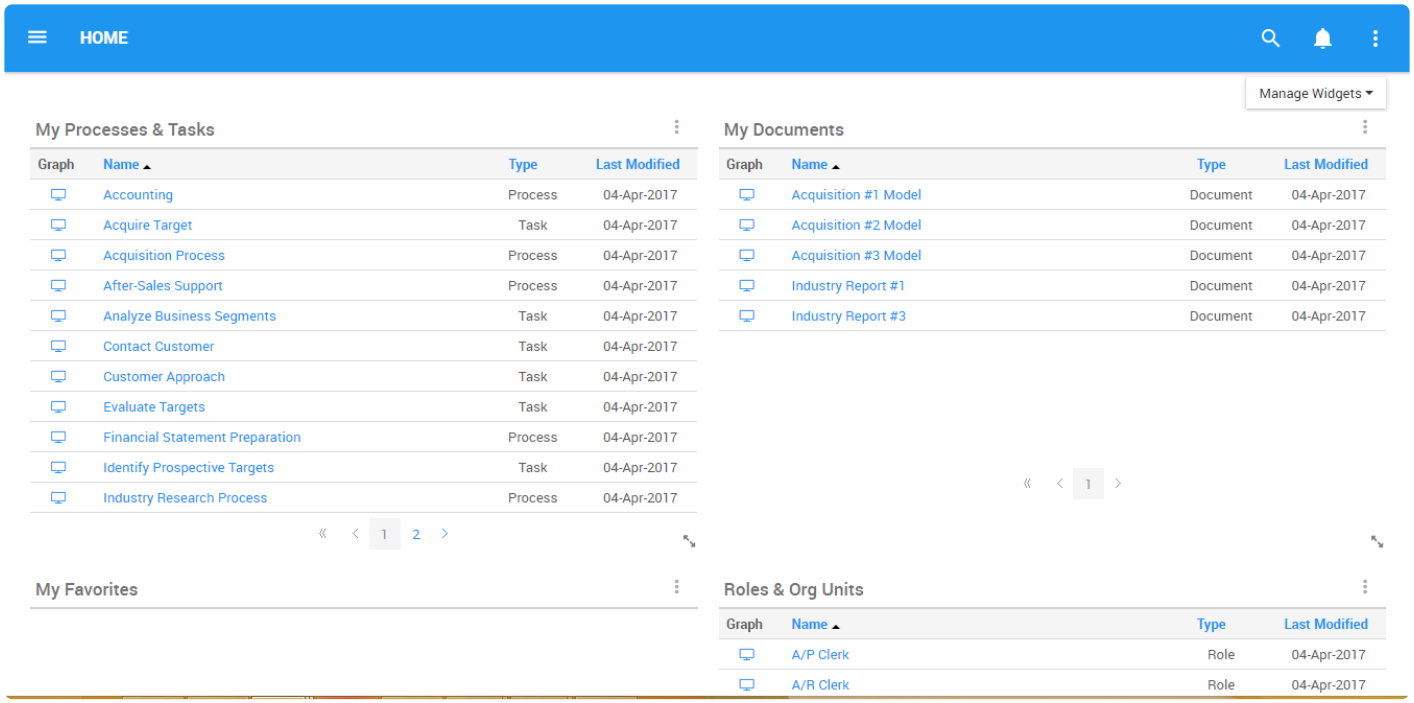
If MFA is enabled for a user, an authentication code will be required when logging in.

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.



4.2.1 Widgets

Widgets are small information windows that fetch and display EPC information in meaningful ways based on your preferences. Having the Widgets on your Home Page, allows you to access key information for your role within the organization easily.

What and how Widgets display the information is fully customizeable. Users can customize the content of the Widgets as well as customize the layout of the Widgets on their Home Page. Furthermore, you can have multiple widgets on your home page and you can place them in the order that best suits your needs.

System Administrators will set default widgets for users based on their forecasted needs. Users can use the Dashboard Manager to customize their Home Page with the widgets needed for their job requirements. Users can also reset their Home Pages to the default standard.

The seven different types of Widgets available are found under the Dashboard Manager. Users can set and customize the following Widgets on their Home Page:

1. My Objects Widget
2. My Documents Widget
3. My Performance Widget
4. My Actions Widget
5. My Performance Chart Widget
6. My Posts & Replies Widget
7. My Actions Pending Widget

4.2.1.1 Widget Dashboard Manager

The Dashboard Manager is a tool that provides a list with all the Widgets available. It also provides a small description to the user about each Widget. The Dashboard Manager enables users to improve and customize their Home Page dashboard to display the EPC content that is meaningful to their preferences.

The Widget Dashboard Manager section will cover the following:

1. How to access the Dashboard Manager
2. How to add widgets to the home page
3. My Objects Widget
4. My Documents Widget
5. My Performance Widget
6. My Actions Widget
7. My Performance Chart Widget
8. My Posts & Replies Chart Widget
9. My Actions Pending Widget

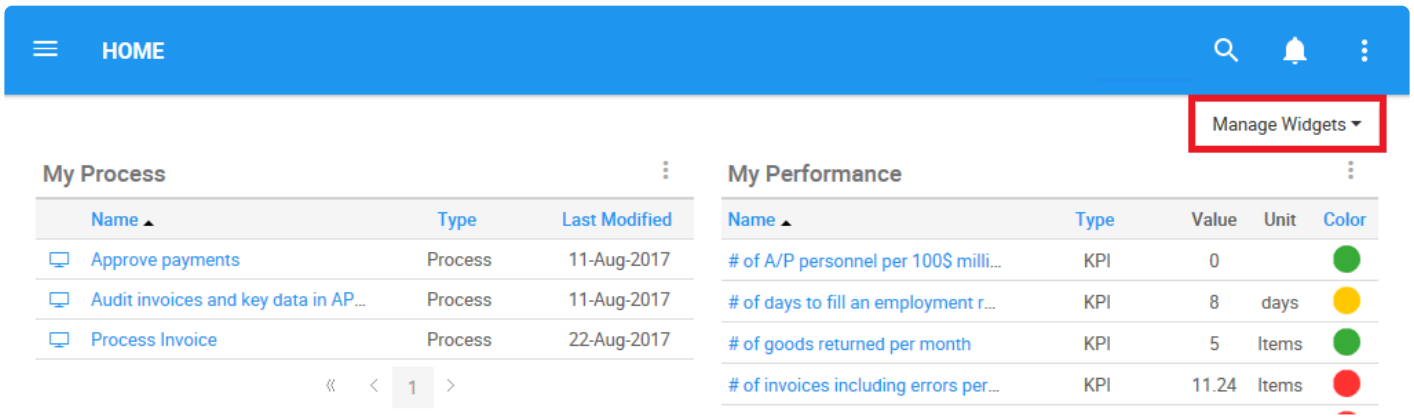
4.2.1.1.1 Access Dashboard Manager

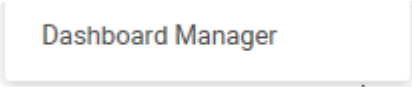
In order to add Widgets to the Home Page, users will need to access the Dashboard Manager.

How to access the Dashboard Manager

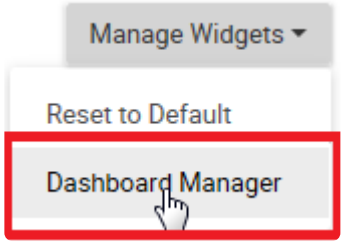
1. Navigate cursor to the

icon listed in the top right corner of the Home page

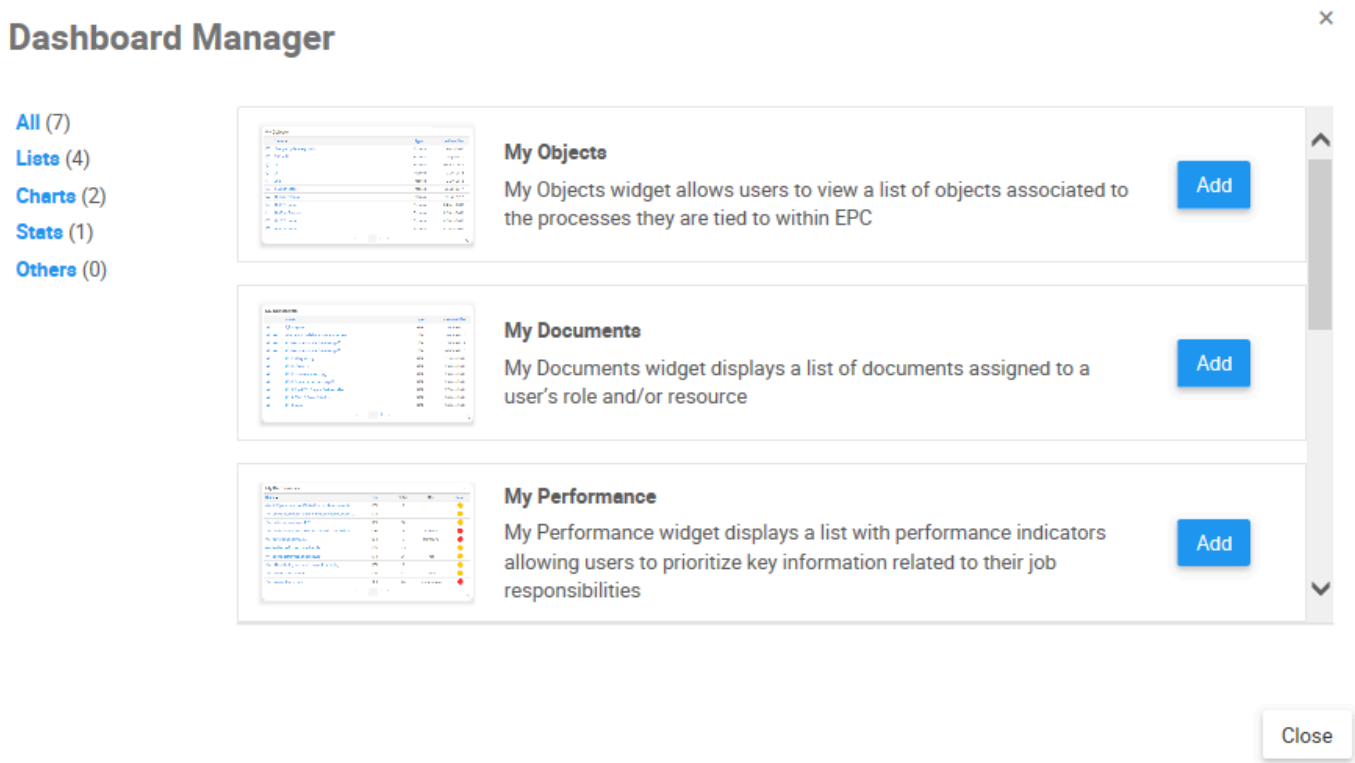


2. A drop-down menu will be generated. Click on the 

icon



3. The Dashboard Manager window will open

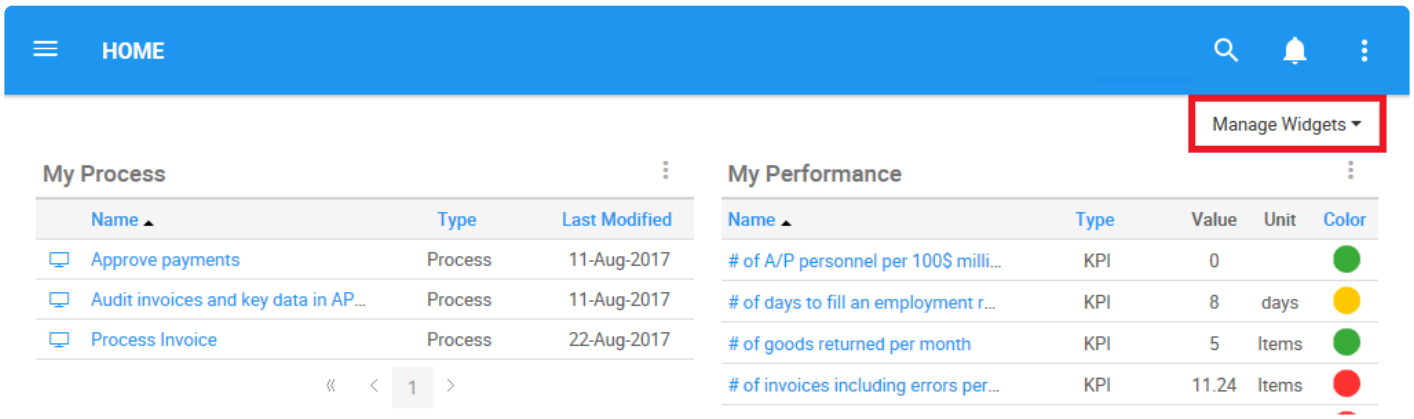

Dashboard Manager
All (7)
Lists (4)
Charts (2)
State (1)
Others (0)
My Objects
My Objects widget allows users to view a list of objects associated to the processes they are tied to within EPC
Add
My Documents
My Documents widget displays a list of documents assigned to a user's role and/or resource
Add
My Performance
My Performance widget displays a list with performance indicators allowing users to prioritize key information related to their job responsibilities
Add
Close

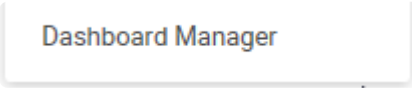
4.2.1.1.2 Add Widgets to Home Page

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

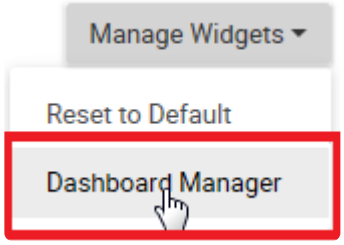
1. Navigate cursor to the

icon listed in the top right corner of the Home page

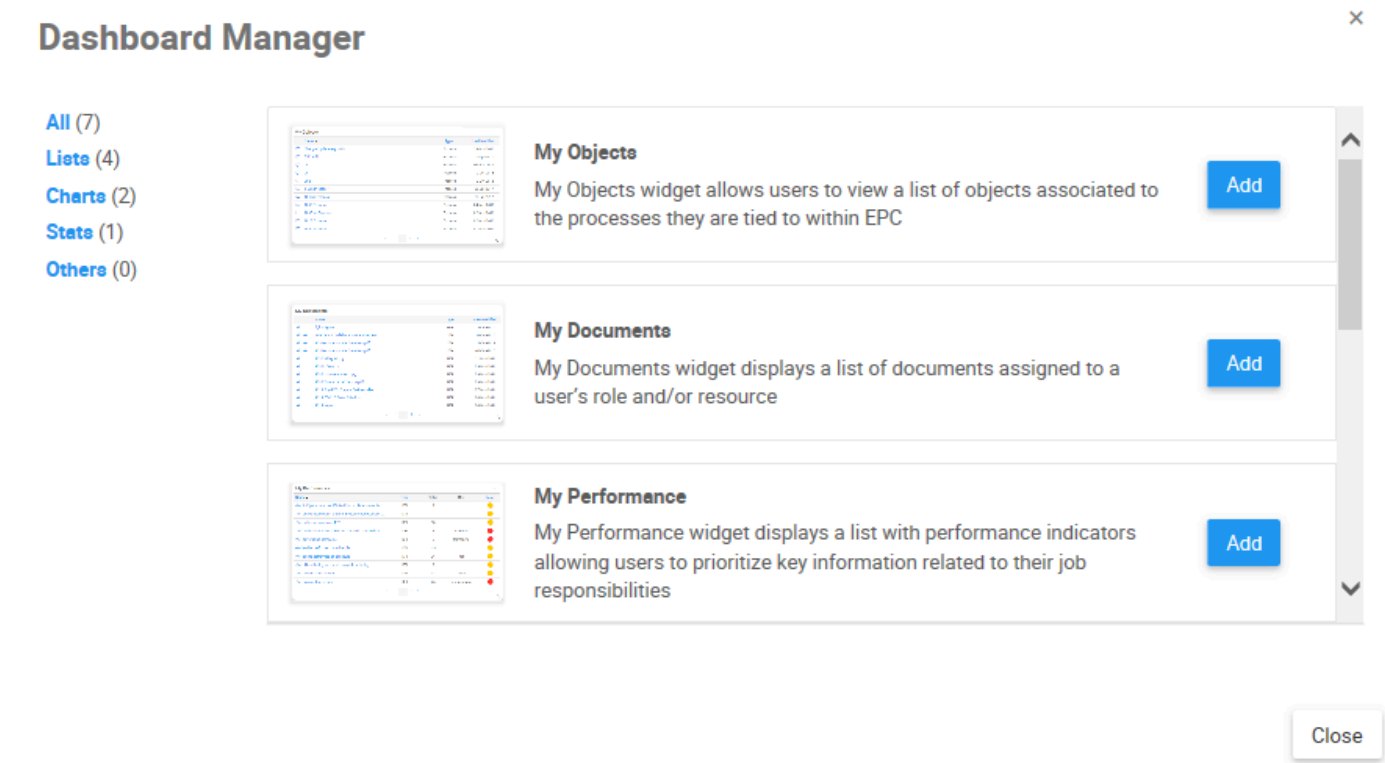


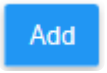
2. A drop-down menu will be generated. Click on the 

box

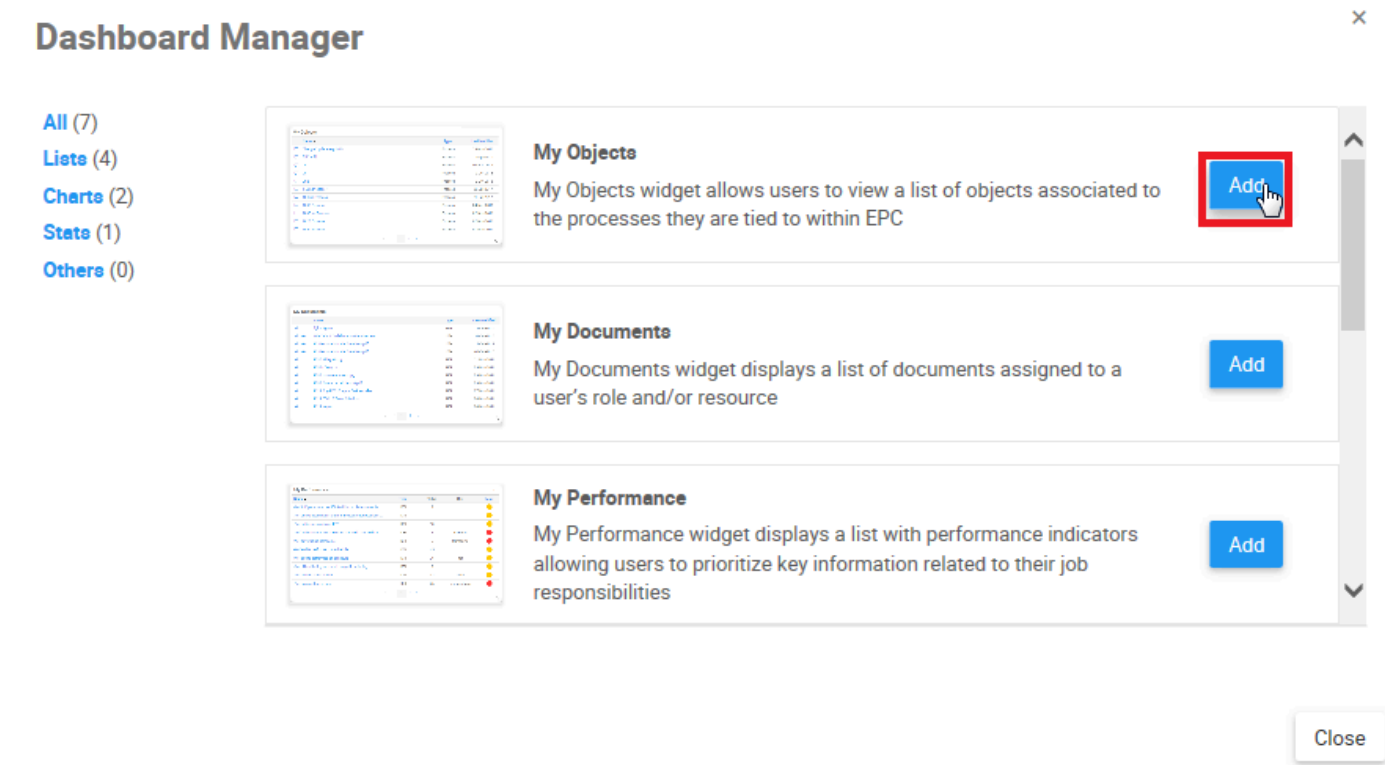


3. The Dashboard Manager window will open

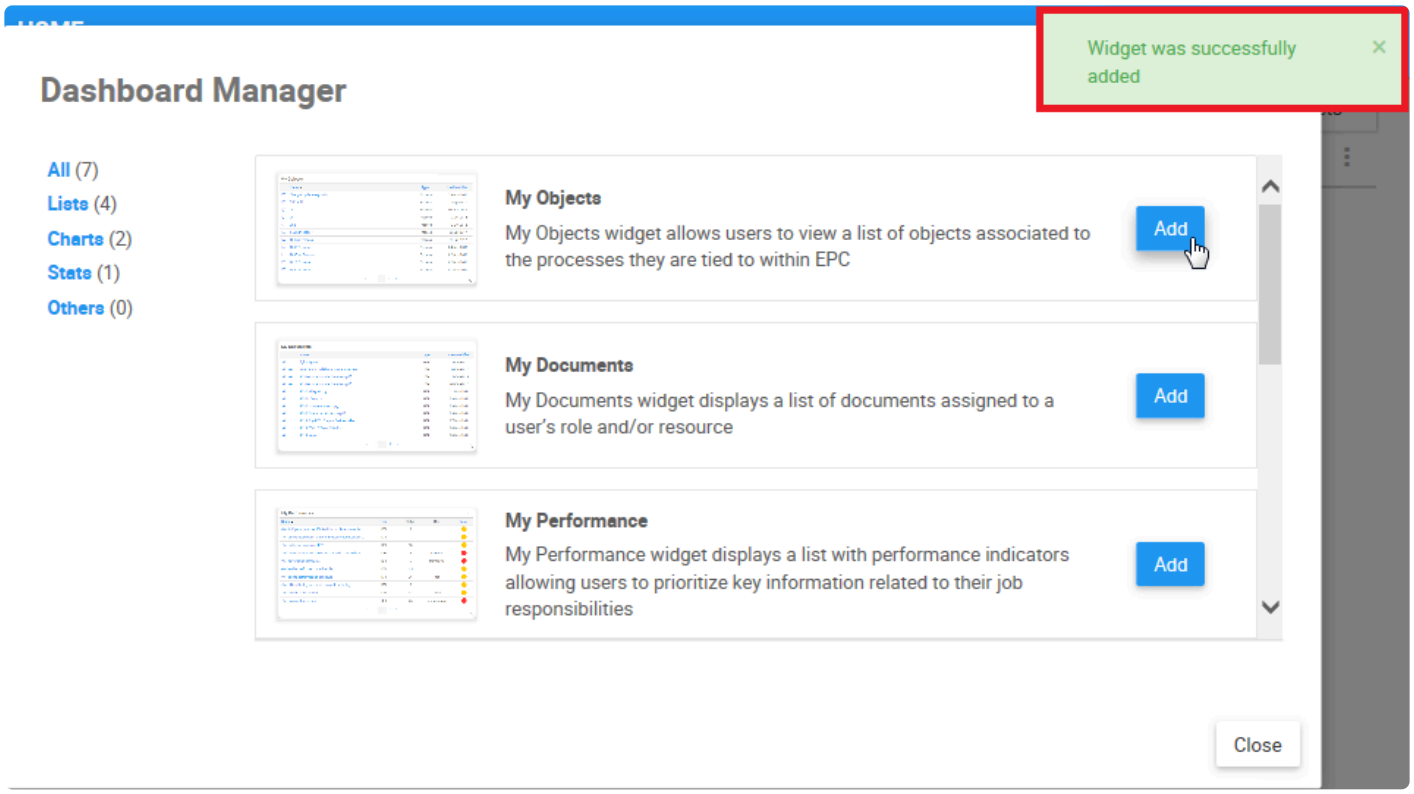


4. Select the Widget you would like to add to your Home page, for this example, click on the 

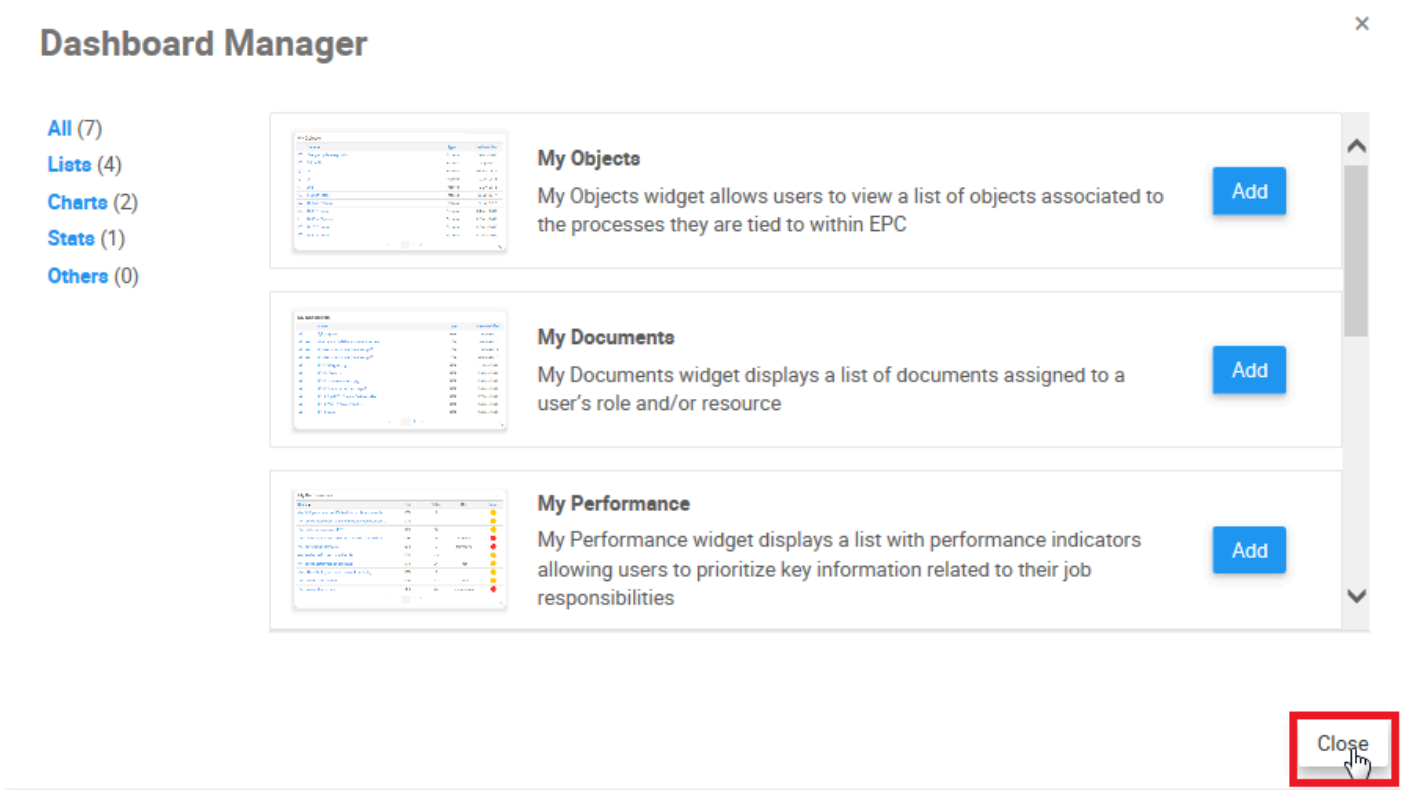
box to add "My Objects" to your home page.



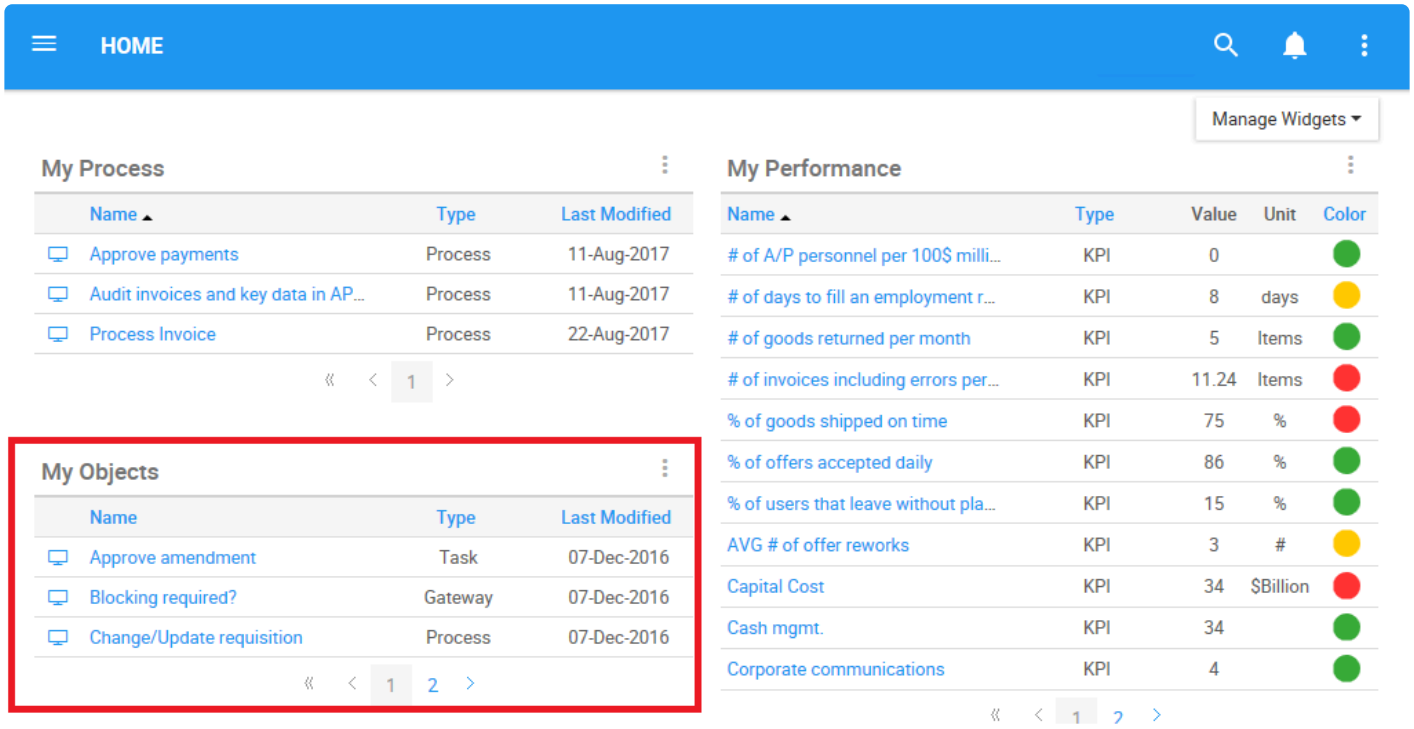
5. You will receive an automatic notification once the widget will successfully be added to the home page



6. Once you finished adding widgets from the Dashboard Manager, click on the Close icon to exit the dashboard



7. The new widget will be generated on your home page in one of the available panels



4.2.1.1.3 My Objects Widget

The “My Objects” Widget allows users to feature any object within the EPC on the widget. These items can be processes, process components and/or associated items. Users can easily keep track and access objects associated to their job requirements within their Home Page.

Users can also use this widget as a management tool to keep track of objects assigned to other roles, resources, org units and/or assets within the organization.

Users can filter the Widget by the following types:
1. Asset
2. Attribute
3. Control
4. Control Set
5. Document
7. Document Set
8. End
9. Entity
10. Gateway
11. Intermediate
12. Key Performance Indicators (KPIs)
13. Key Control Indicators (KCIs)
14. Key Risk Indicators (KRIs)
15. Master Data Set
16. Objective
17. Org Unit
18. Org Unit Set
19. Performance Set
20. Process
21. Process Set
22. Report
23. Resource
24. Risk
25. Risk Set
26. Role
27. Rule
28. Rule Set
29. Start
30. Task

My Object Widget Components

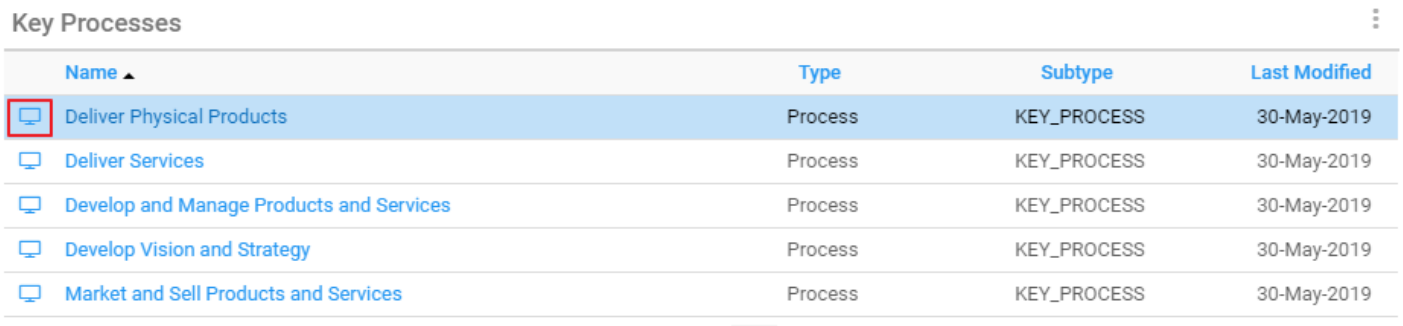
Component	Description

Quick Graph View Icon	: Icon allowing user to immediately view the object in a graph mode
Name	Name of the Object
Type	Type of the Object
Subtype	The object's assigned subtype
Last Modified	The last date that the object in question was modified

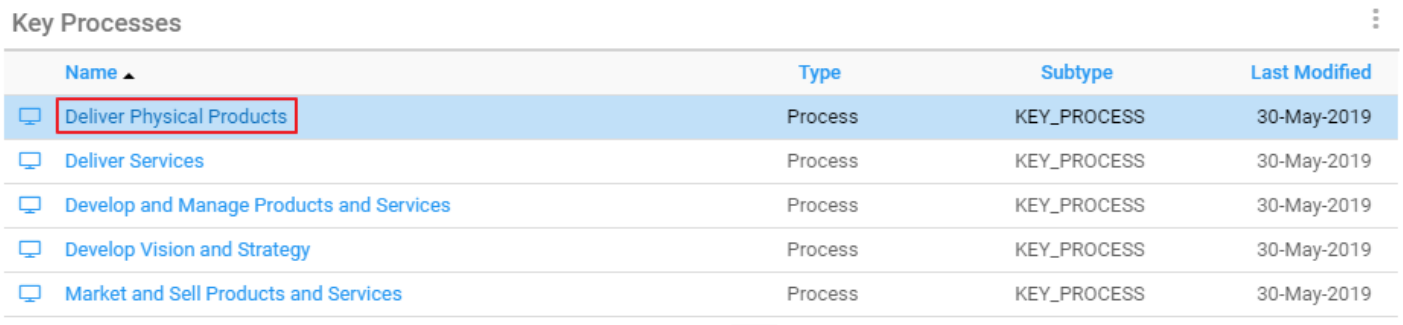
My Objects Widget Navigation

1. Navigate to the Home Page and add a "My Objects" Widget using the Dashboard Manager

2. Click on the icon to immediately view the object in a graph mode



3. Click on the name of the Document to navigate to the item's Details page



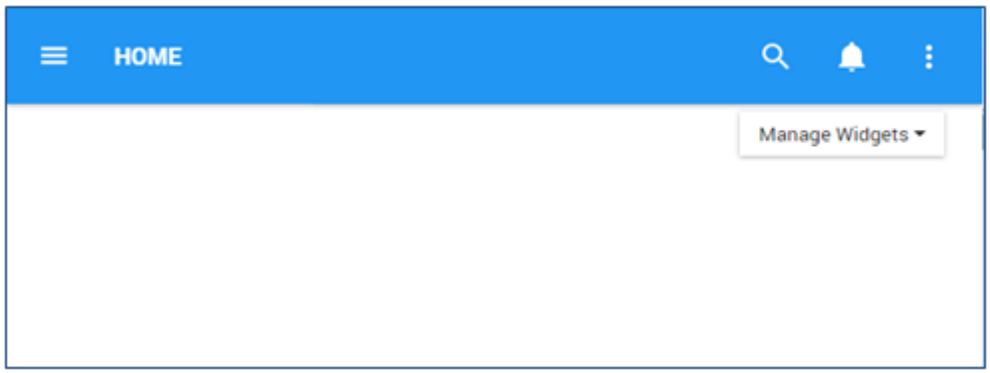
To customize the My Objects Widget, click here

4.2.1.1.3.1 Customize My Objects Widgets

The My Objects Widget 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.

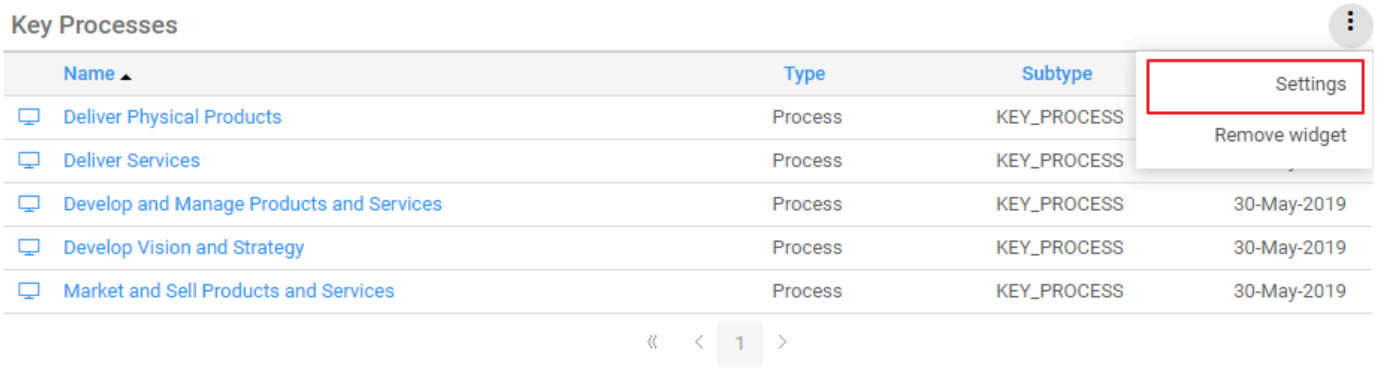
Please follow the instructions below to customize the “My Objects” Widget.

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

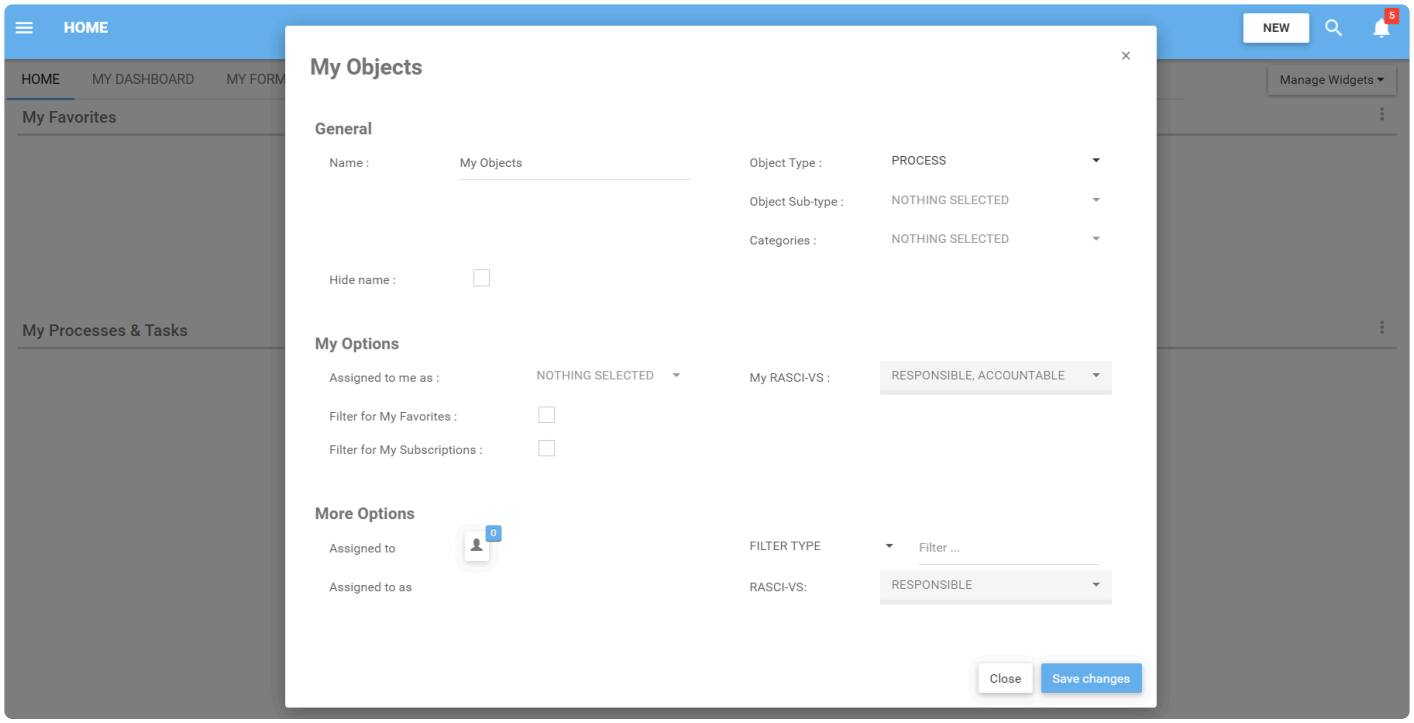


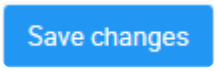
2. To add widgets to your home page, navigate to the the Manage Widgets button and select the widget you want to add from the Dashboard Manager

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



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

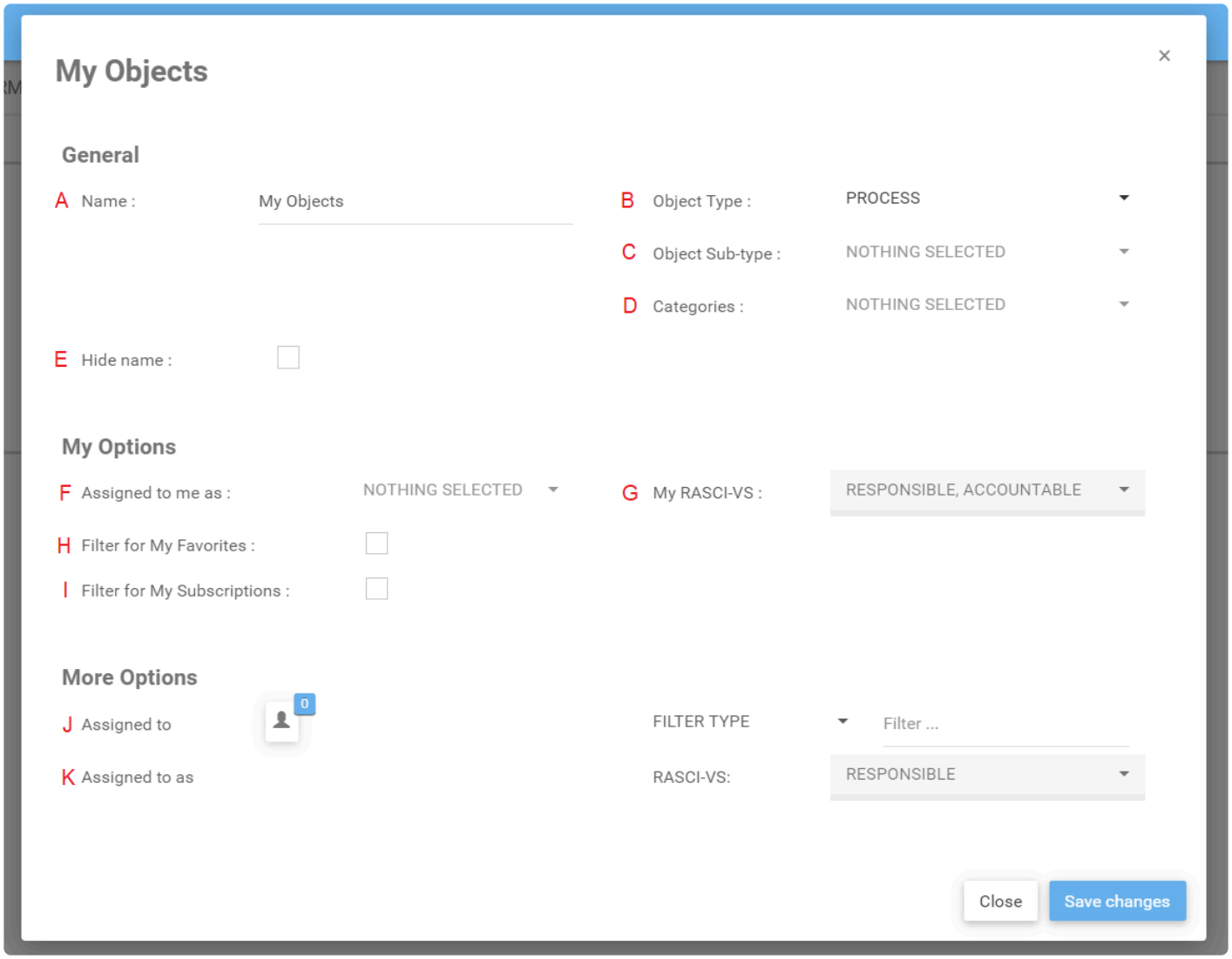


5. After customizing the settings, click on the 

button to save the changes made.

My Objects Widget Settings Parameters

In the settings window, there are a number of parameters that a user can use to customize “My Objects” widget and improve their Home Page.



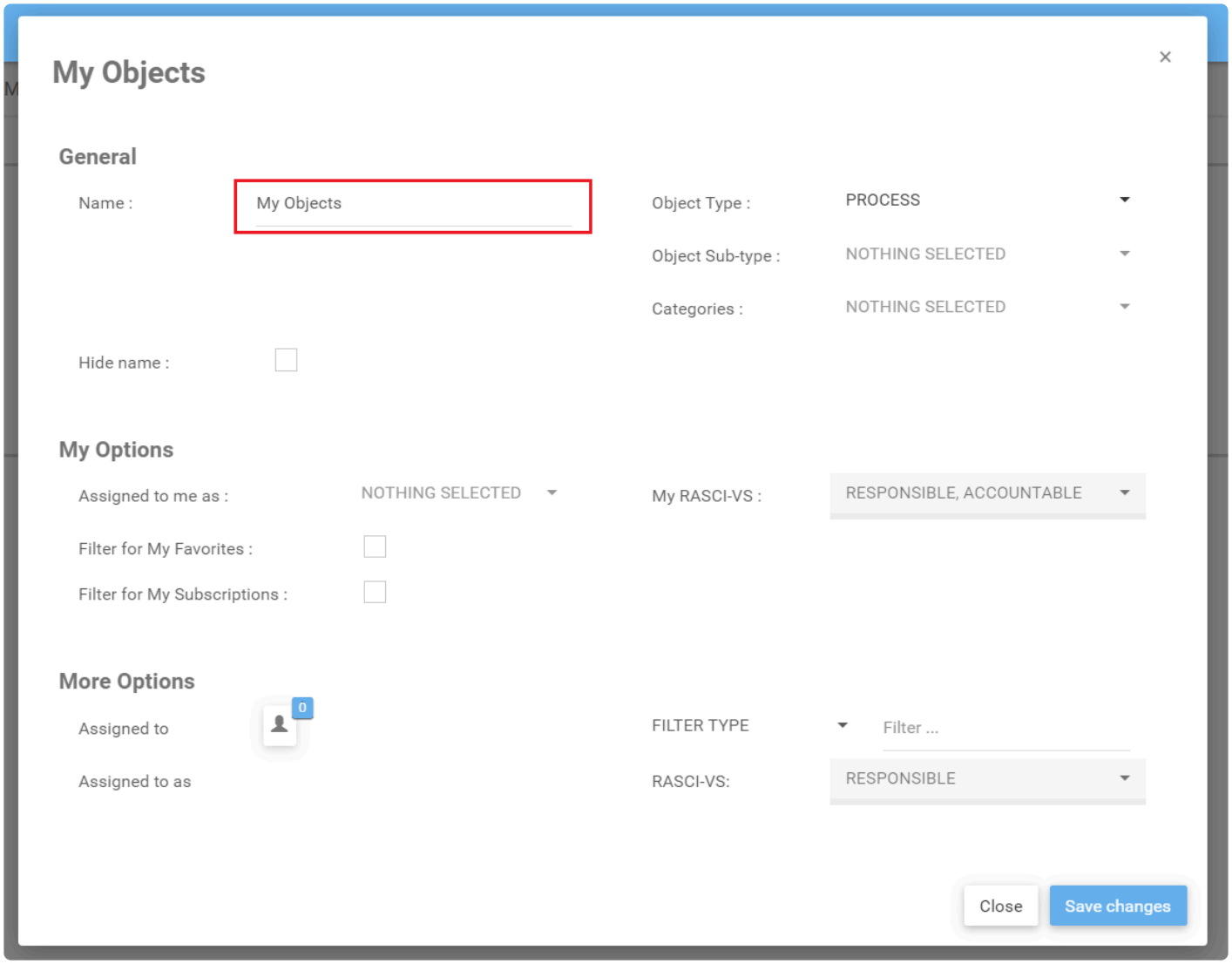
Item	Setting	Purpose
A	Name	Allow user to customize the title of the Widget.
B	Object Type	The primary filter of the “My Objects”. Allow users to select a specific object type to be featured.
C	Object Sub-Type	Allow users to filter by the assigned object sub-types (sub-types can be manually assigned in the properties of an object). Note that if more than 2 object types are chosen in the above filter, this field will be disabled.
D	Categories	Allow users to filter by the assigned object categories (categories can be manually assigned in the properties of an object).
E	Hide Name	Allow users to hide the display name of the widget.
F	Assigned to me as	Allow users to filter through their assigned Roles and Resources.
G	My	Allow users to organize their Roles and Resources based on their level of involvement.

	RASCI-VS	
H	Filter for My Favorites	Allow users to sort specific objects by favorites vs. non-favorites.
I	Filter for My Subscriptions	Allow users to sort specific objects by subscribed items.
J	Assigned to	Allows users to filter objects that are related to other Roles, Resources, Org Units and Assets.
K	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

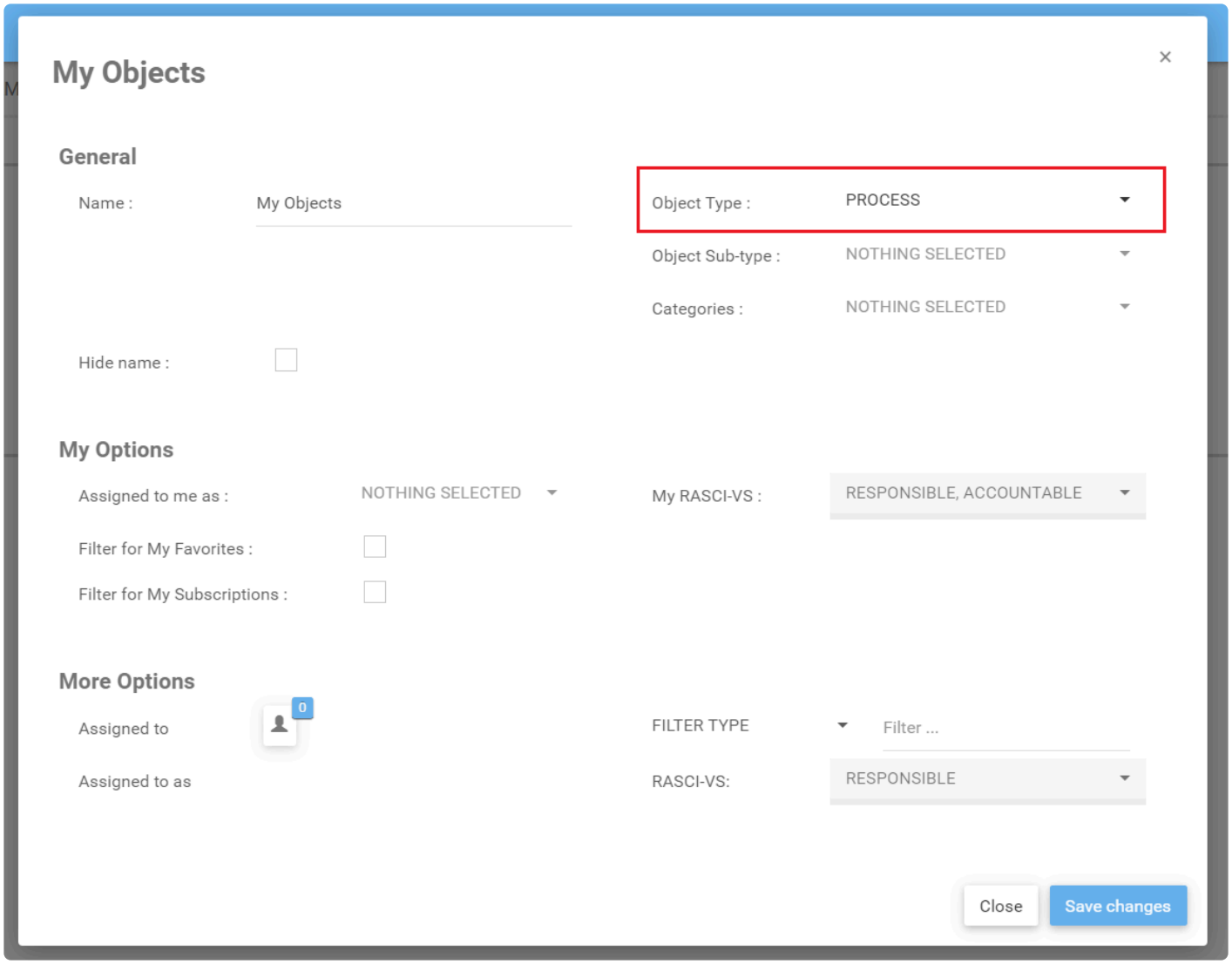
i. Navigate cursor over existing name box



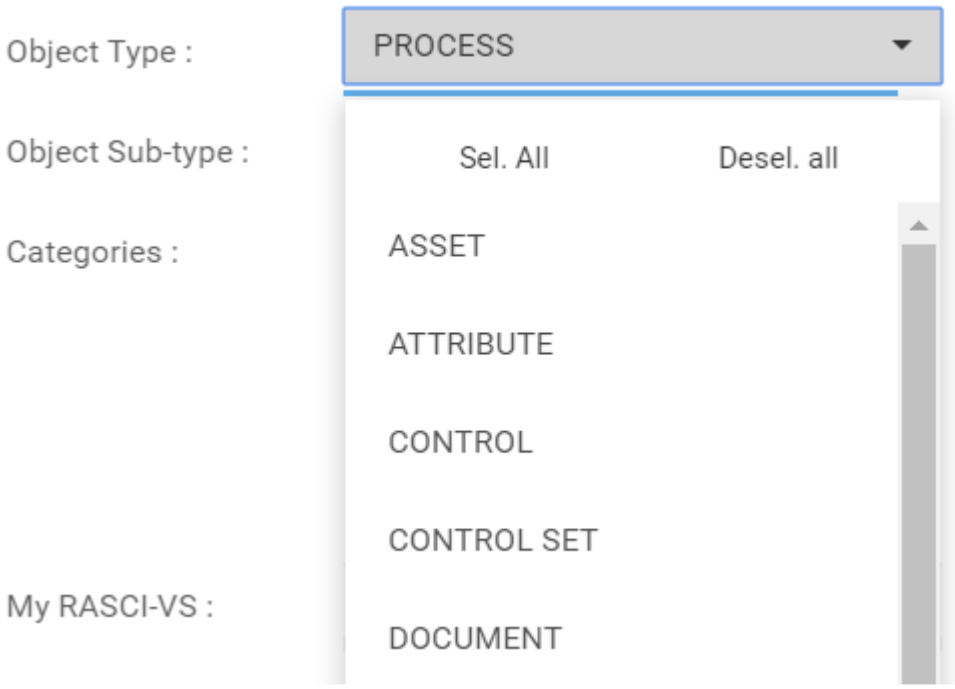
ii. Edit name by selecting name box and typing in desired name

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



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



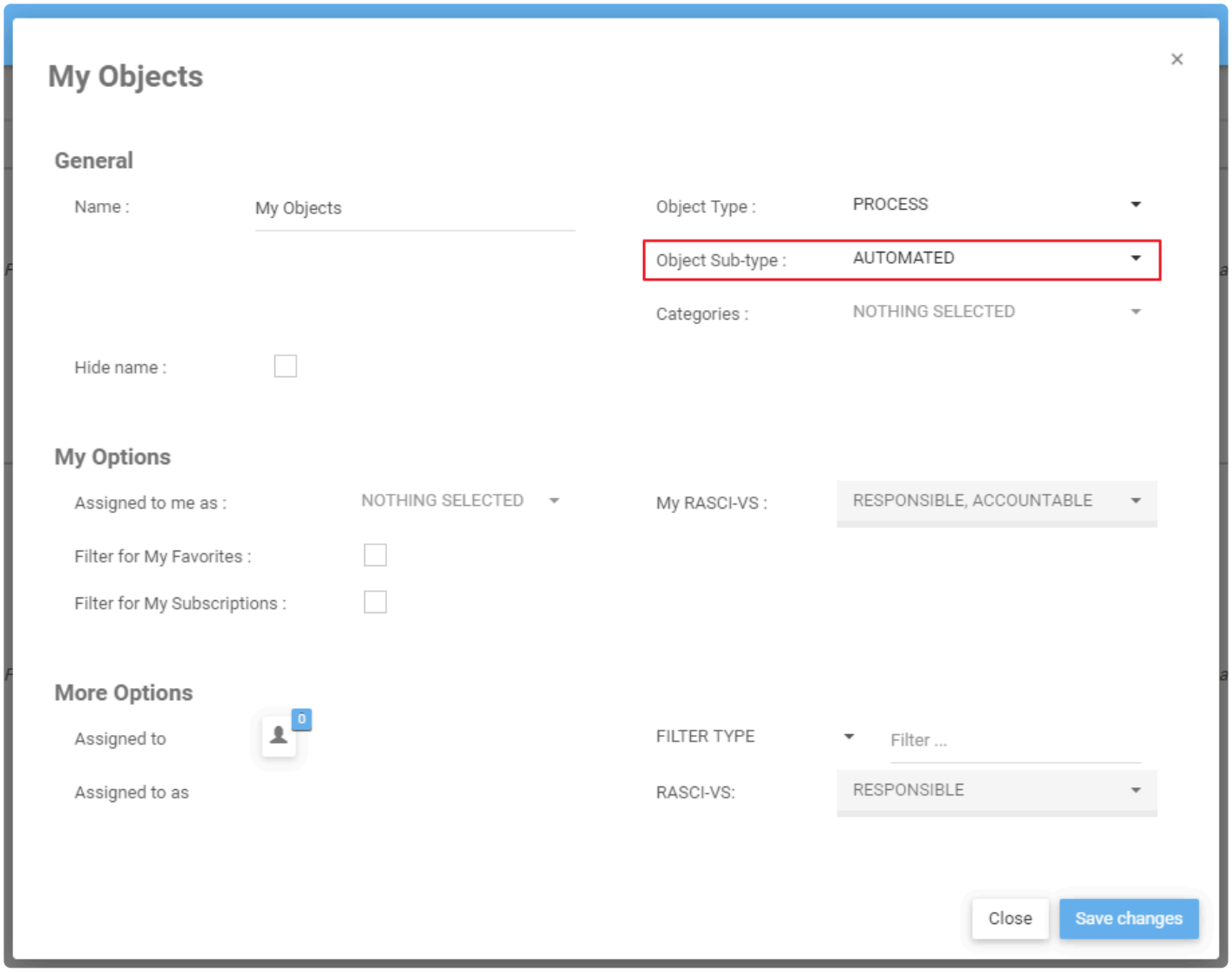
iii. Select/Deselect desired object(s) to be featured in Widget window by navigating cursor and clicking on respective objects. Additionally, the drop-down menu features Select All and Deselect all buttons that can be used for mass selection.

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

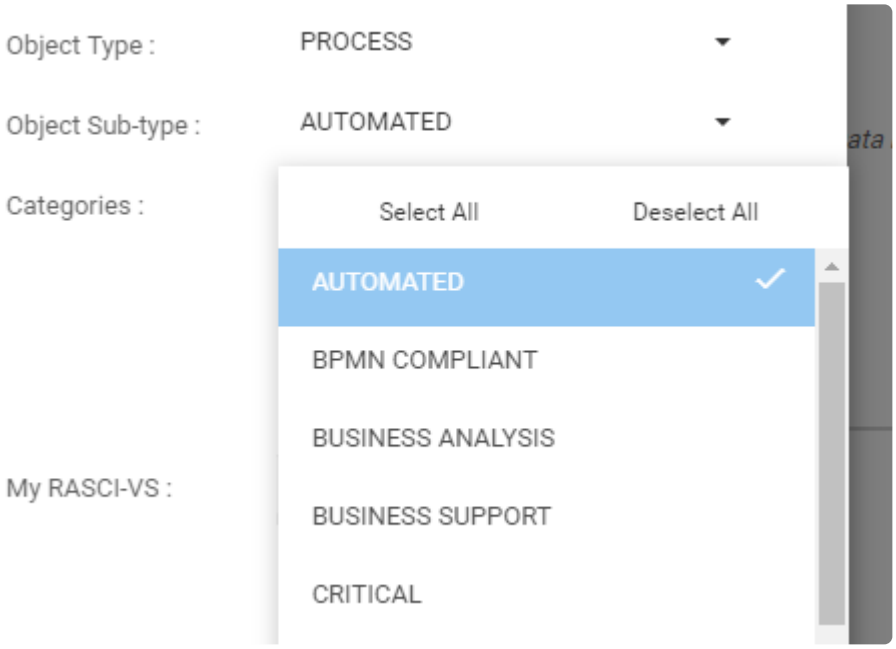
C. **Object Sub-Type:** Users can use sub-type as an additional filter. This will filter for the selected object type that has a particular sub-type assigned. Sub-Types can be defined by administrators. These sub-types can then be associated to any object in EPC in the object's properties. Note that only 1 sub-type can be assigned per object. As such, while users are able to select multiple sub-type filters for a single object type, this field will be disabled if the user selects multiple object types, as sub-types may vary between object types. To learn more about sub-types, click here.

Users can select multiple sub-type for a SINGLE object type. To add a filter, follow these steps:

i. Select the Object Sub-Type dropdown



ii. This will generate a dropdown of possible sub-types based on the object type

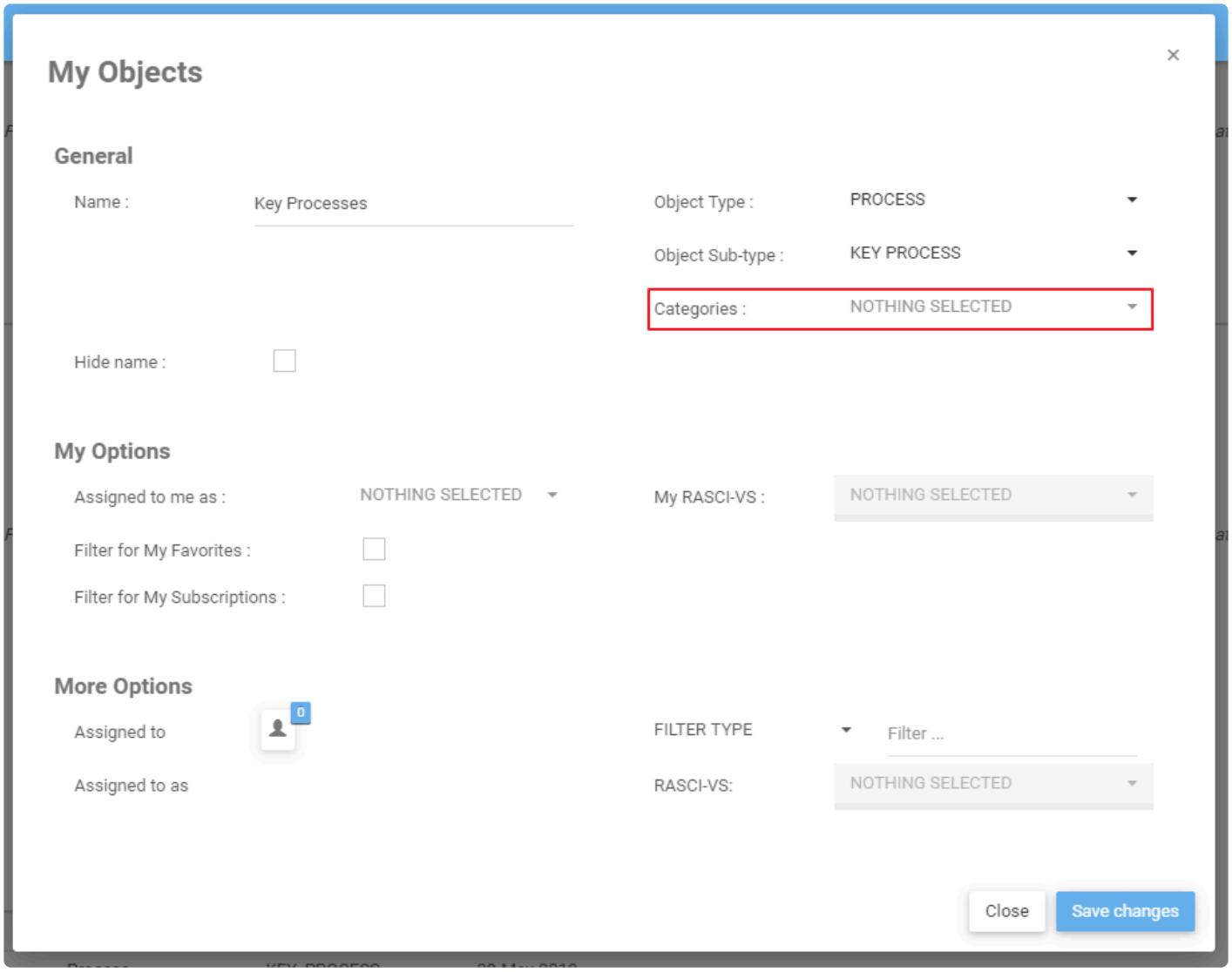


iii. Select one or more sub-type to apply the filter

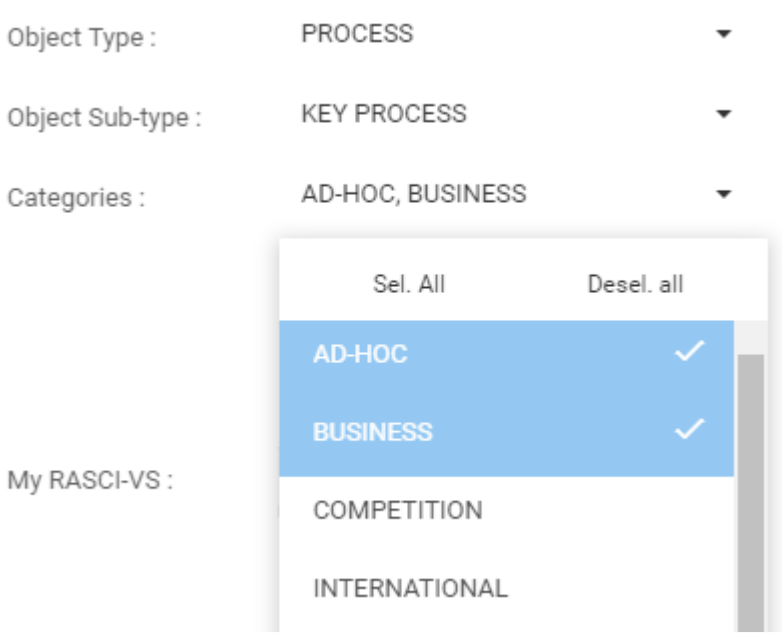
D. **Categories**: Objects in EPC can be assigned multiple categories, depending on business needs. Categories are used to classify objects; users might want to filter all processes and assets that are currently outsourced and belong to the IT department. In this case, the “Outsource” and “IT” categories would be used as filters. Note that since multiple categories can be assigned to a single object, users are able to select many object types. To learn more about categories, click here.

To filter objects by categories, follow these steps:

i. Select the Categories dropdown

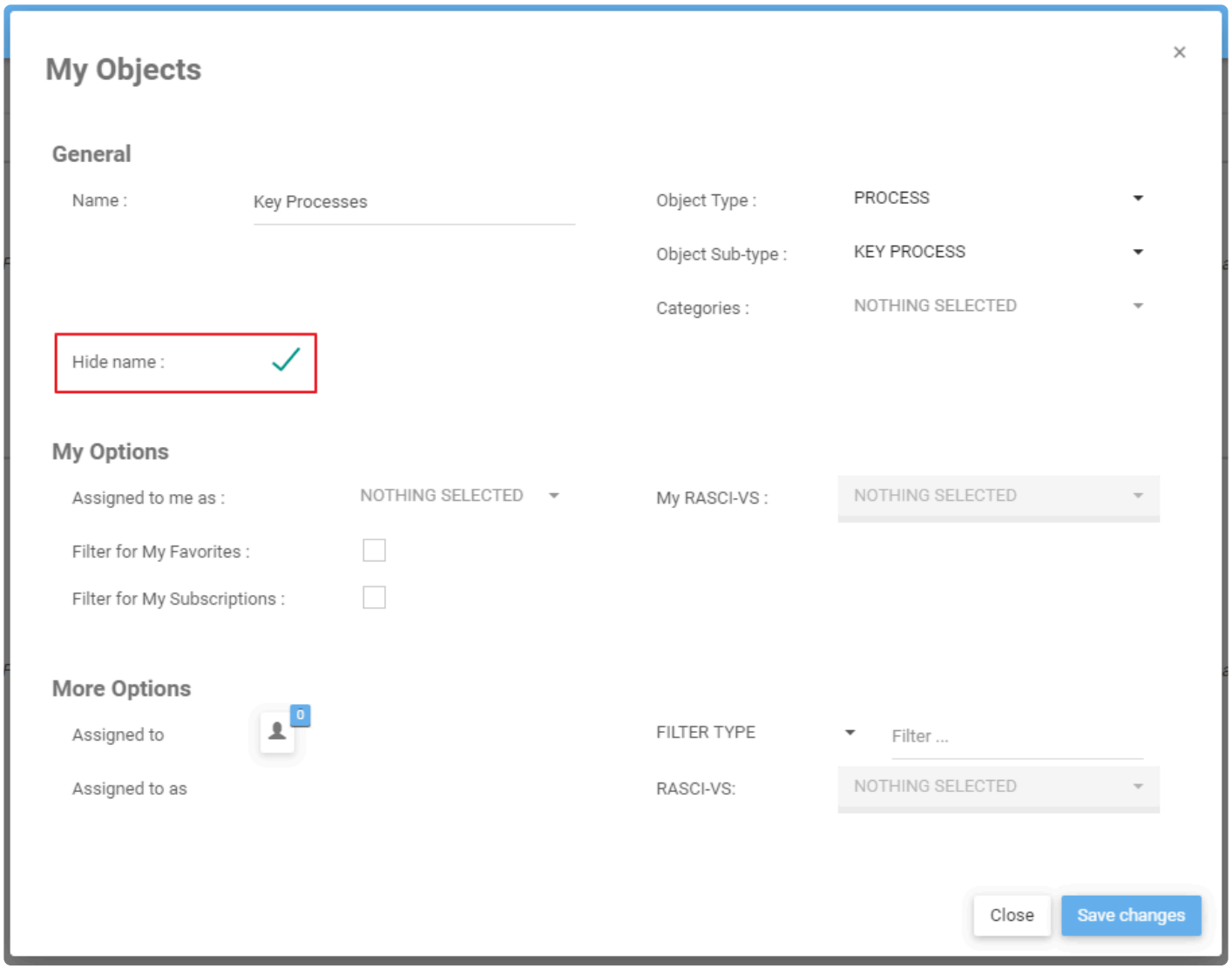


ii. This will generate a dropdown list



iii. Select one or more categories to apply the filter

E. **Hide Name**: To hide the display name of the widget, select this option.



The widget will appear in your page without its display name.

	Name	Type	Subtype	Last Modified
	Deliver Physical Products	Process	KEY_PROCESS	30-May-2019
	Deliver Services	Process	KEY_PROCESS	30-May-2019
	Develop and Manage Products and Services	Process	KEY_PROCESS	30-May-2019
	Develop Vision and Strategy	Process	KEY_PROCESS	30-May-2019
	Market and Sell Products and Services	Process	KEY_PROCESS	30-May-2019

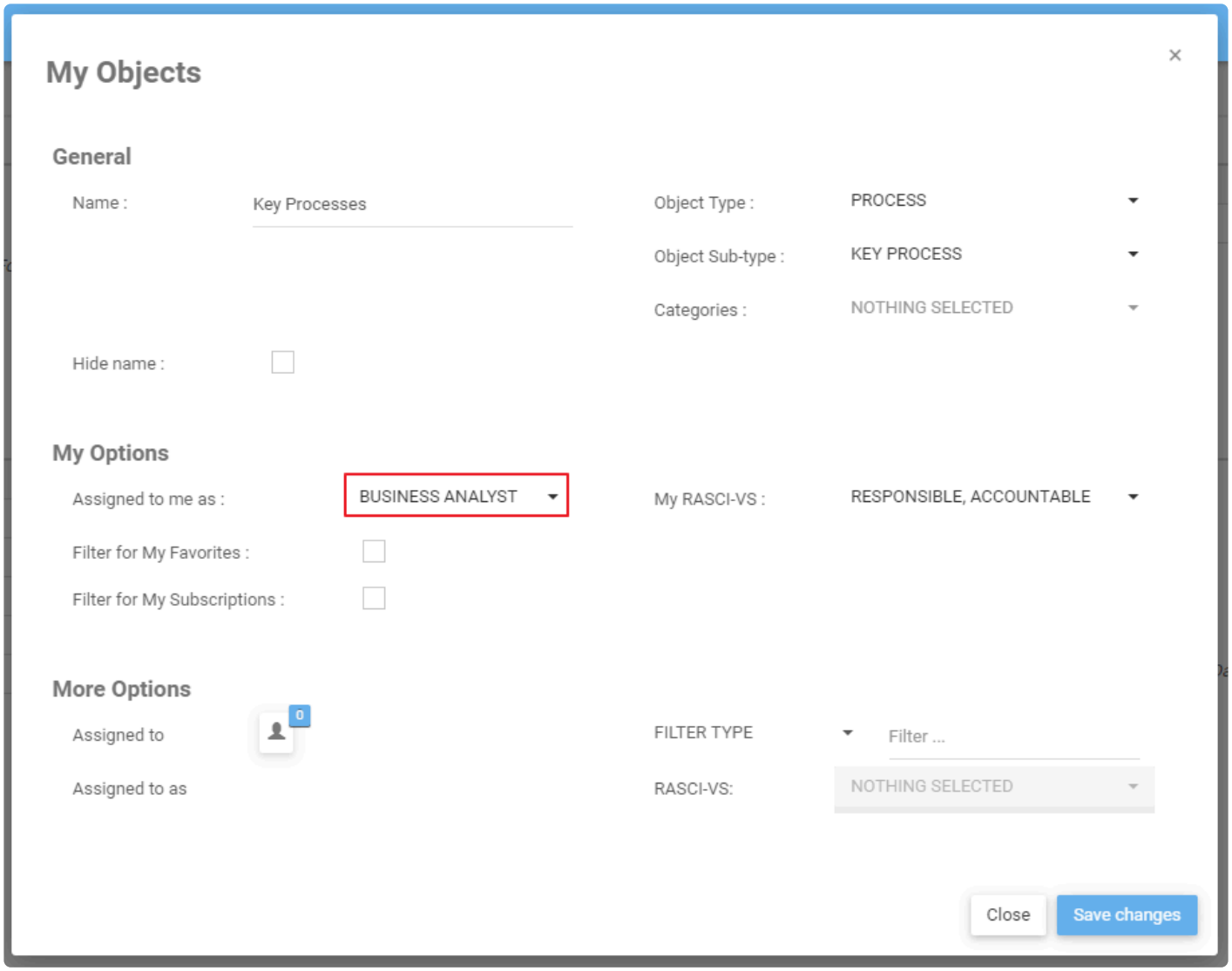
« < 1 >

F. **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:



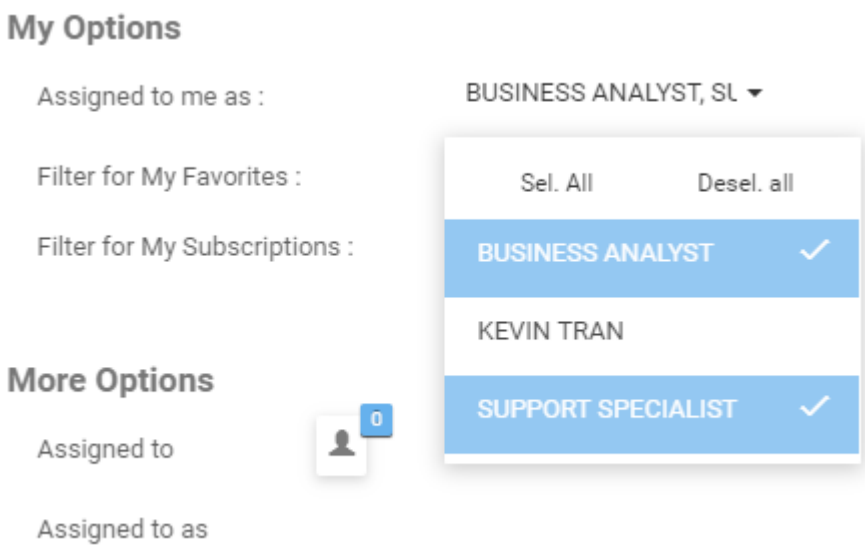
The drop-down list will feature all of the roles and resources that the Web App user has been assigned. As seen below, the list for this specific user is populated with 2 roles (Business Analyst and Support Specialist) and with his specific resource profile (Kevin Tran).

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

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

ii. This generate a drop-down menu

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



As seen above, the list for this specific user is populated with 2 roles (Business Analyst and Support Specialist) and with his specific resource profile (Kevin Tran).

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

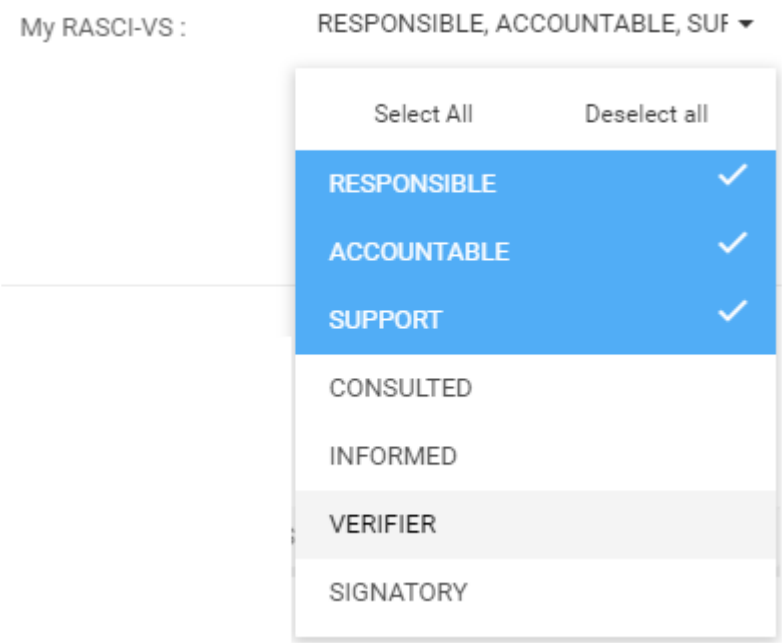
> It is not mandatory to select a role in order to customize your settings.

G. **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.

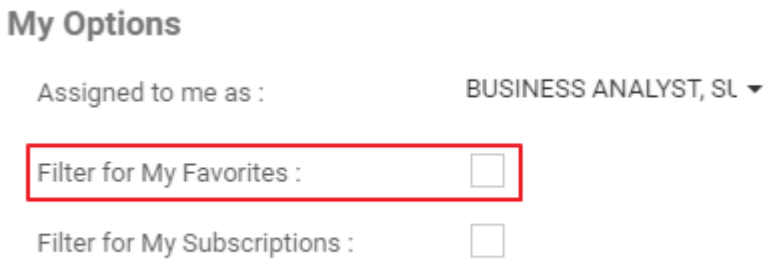
Users can select multiple different filters should a user want to include more information within the given Widget.



> 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

H. **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 the tic-box

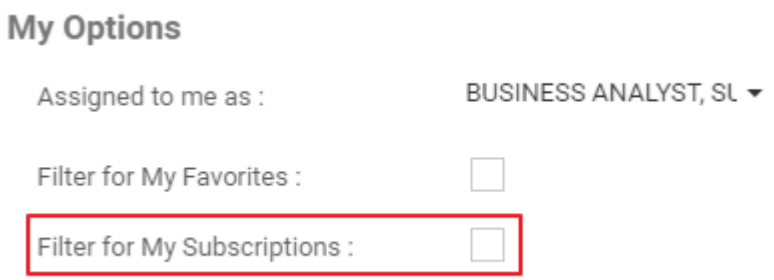


ii. Select option by clicking on box. This will generate a green checkmark to confirm that option has been selected

I. **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



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

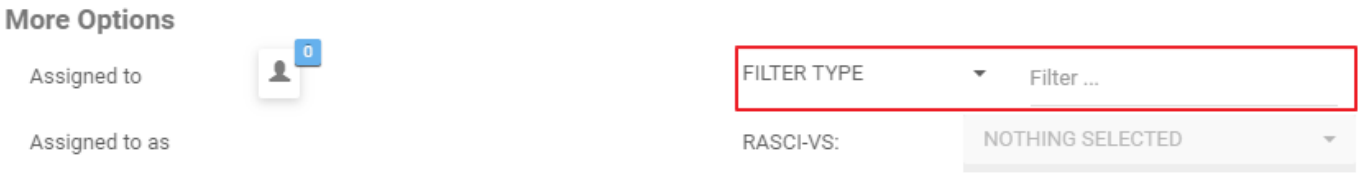
J. **Assigned to:** This filter is designed for users to view Objects that are associated with specific Roles, Resources, Org Units and Assets. This allows users to see which objects relate to different people and roles within the organization.

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

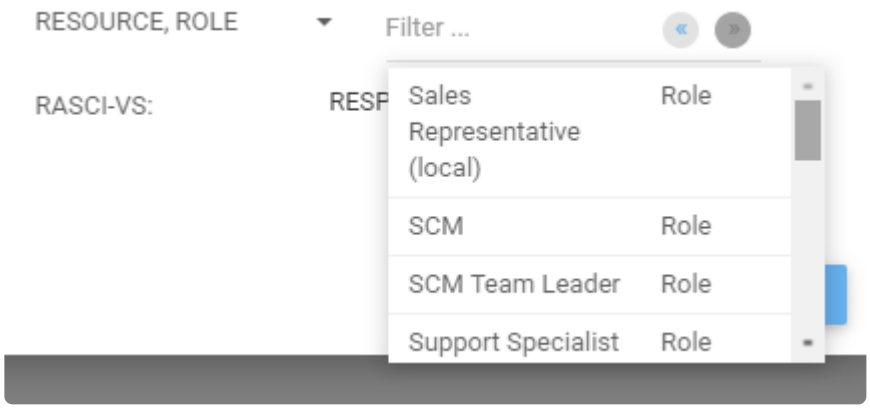
To use the “Assigned to” filter, please see the following steps

i. Navigate to the My Objects – Settings page

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



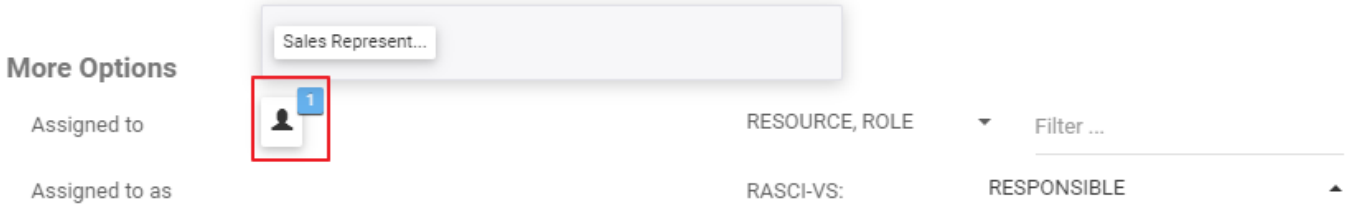
iii. A drop-down menu will be automatically generated



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

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

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



K. **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.

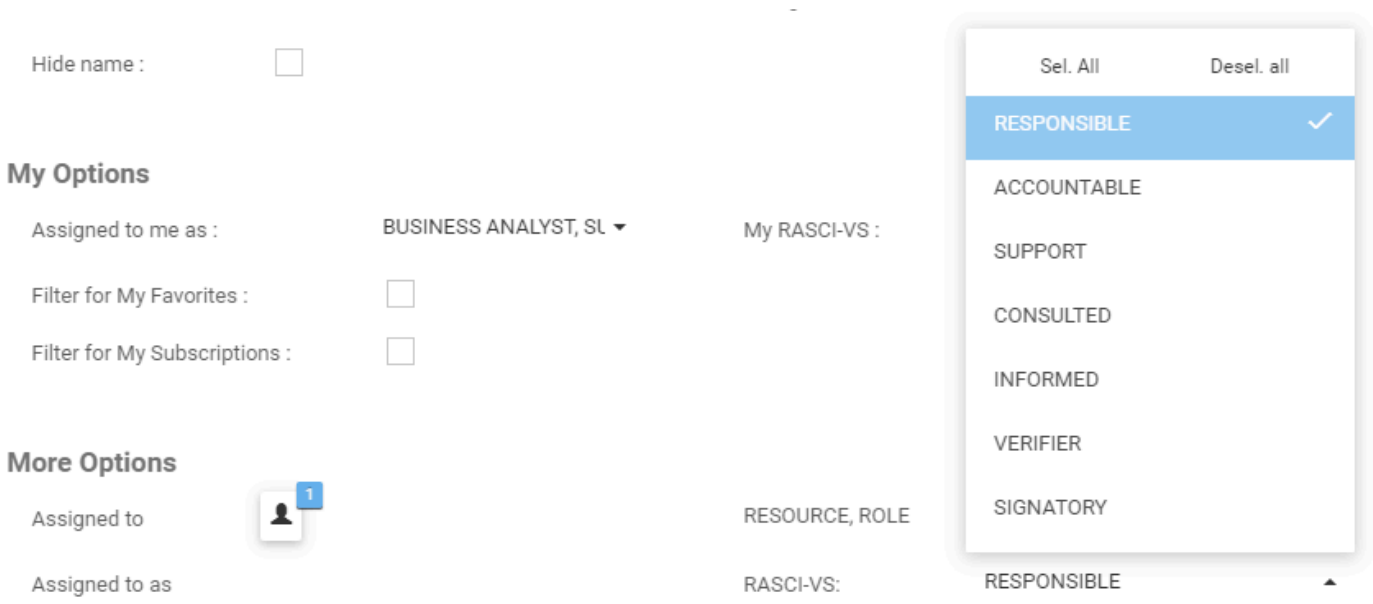
To filter using the Assigned to as function, please see the following instructions:

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

iv. A dropdown menu will be generated for RASCI-VS filter selection



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

4.2.1.1.4 My Documents Widget

The “My Documents” Widget allows users to view a list of documents assigned to their user’s role and/or resource. This allows users to keep track of the documents assigned to them as well as to have easy access to them on the Home Page.

Users can also use this widget as a management tool to keep track of the documents assigned to other roles, resources, org units and/or assets within the organization.

Users can filter the Widget by the following types:
1. Files
2. Reports
3. Standard Operating Procedures (SOPs)
4. URLs
5. Templates

My Documents Widget Components

Component	Description
Download Icon	: Icon allowing user to Download the Document directly from the Widget
Preview Icon	: Icon allowing user to Preview the Document directly from the Widget
Open Icon	: Icon allowing user to open the URL in another tab in the browser directly from the Widget
Name	Name of the Document
Type	Type of the Document
Subtype	The object’s assigned subtype
Last Modified	The last date that the object in question was modified

My Documents Widget Navigation

1. Navigate to the Home Page and add a “My Documents” Widget using the Dashboard Manager

2. Click on the icon to download the Document

My Documents

Name	Type	Subtype	Last Modified
Audit Invoice (AP) SOP	File	INSTRUCTIONS_/_USER_GUIDE	30-May-2019
Internal Google Drive	URL	APPLICATION_LINK	30-May-2019
Portal Login Instructions	URL	APPLICATION_LINK	30-May-2019

1

3. Click on the icon to preview the Document

My Documents

Name	Type	Subtype	Last Modified
Audit Invoice (AP) SOP	File	INSTRUCTIONS_/_USER_GUIDE	30-May-2019
Internal Google Drive	URL	APPLICATION_LINK	30-May-2019
Portal Login Instructions	URL	APPLICATION_LINK	30-May-2019

1

4. Click on the icon to open the URL in another tab in your browser

My Documents

Name	Type	Subtype	Last Modified
Audit Invoice (AP) SOP	File	INSTRUCTIONS_/_USER_GUIDE	30-May-2019
Internal Google Drive	URL	APPLICATION_LINK	30-May-2019
Portal Login Instructions	URL	APPLICATION_LINK	30-May-2019

1

5. Click on the name of the Document to navigate to the item's Details page

My Documents

Name	Type	Subtype	Last Modified
Audit Invoice (AP) SOP	File	INSTRUCTIONS_/_USER_GUIDE	30-May-2019
Internal Google Drive	URL	APPLICATION_LINK	30-May-2019
Portal Login Instructions	URL	APPLICATION_LINK	30-May-2019

1

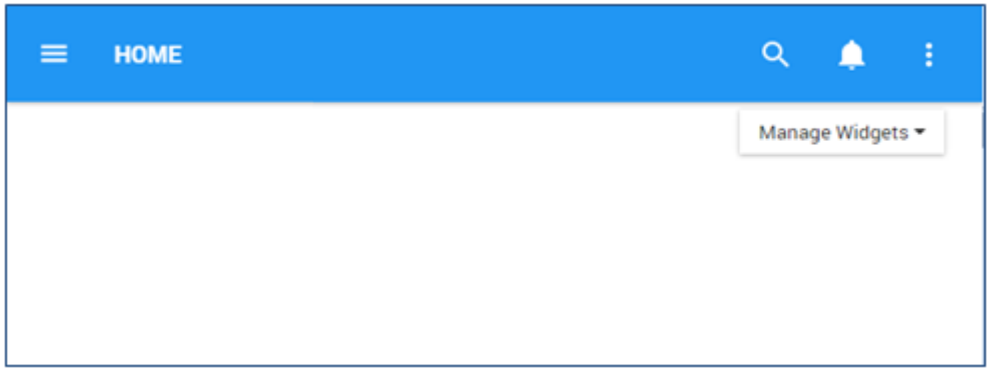
To customize the My Documents Widget, click here

4.2.1.1.4.1 Customize My Documents Widgets

The My Documents Widget allows users to view a list of documents assigned to their user's role and/or resource or documents assigned to other roles, resources, org units and/or assets within the organization.

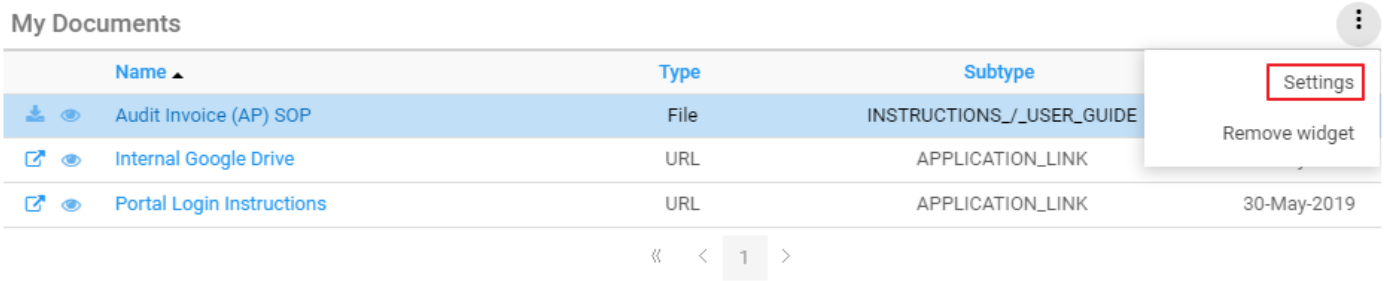
Please follow the instructions below to customize the "My Documents" Widget.

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

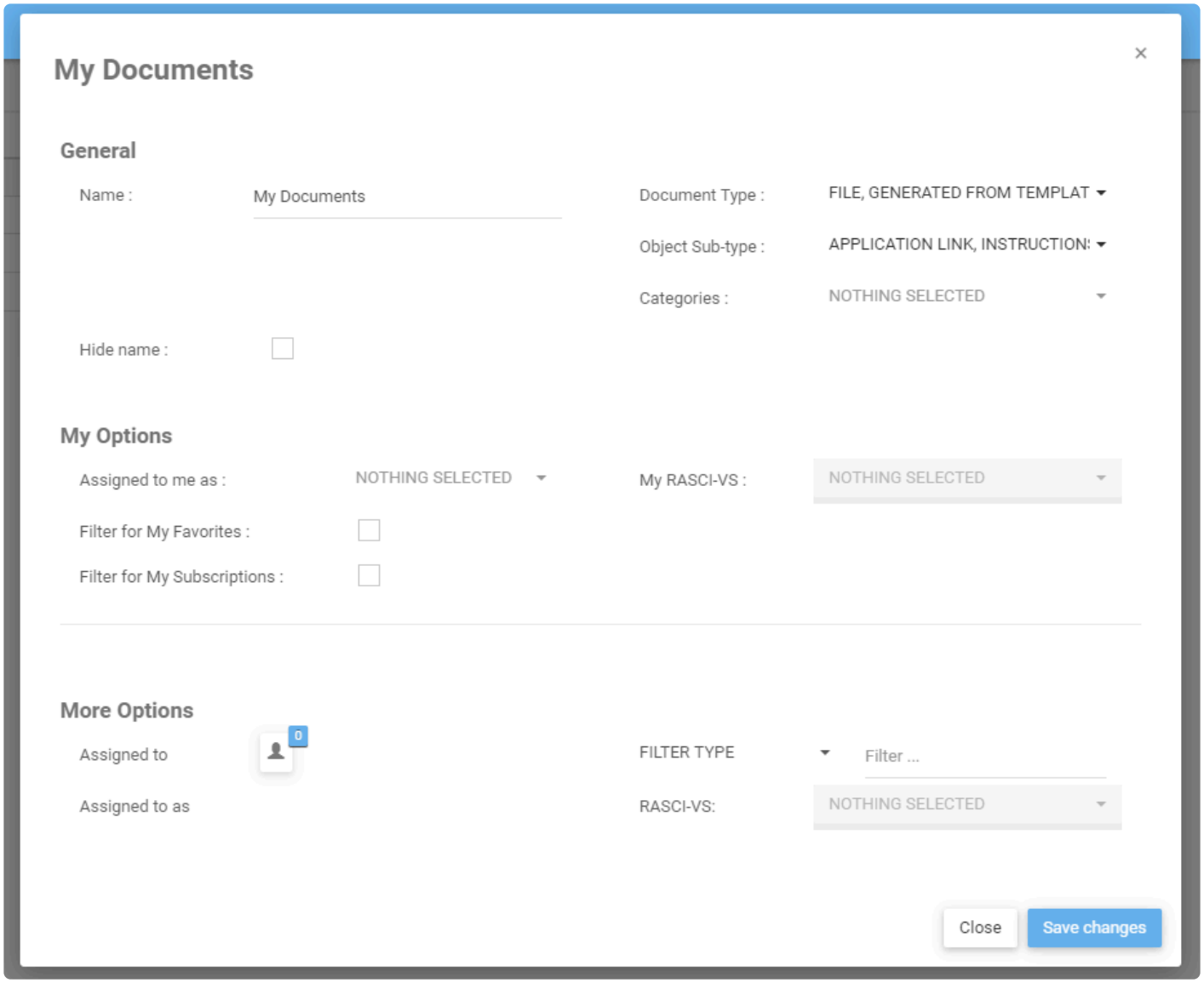


2. To add widgets to your home page, navigate to the the Manage Widgets button and select the widget you want to add from the Dashboard Manager

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



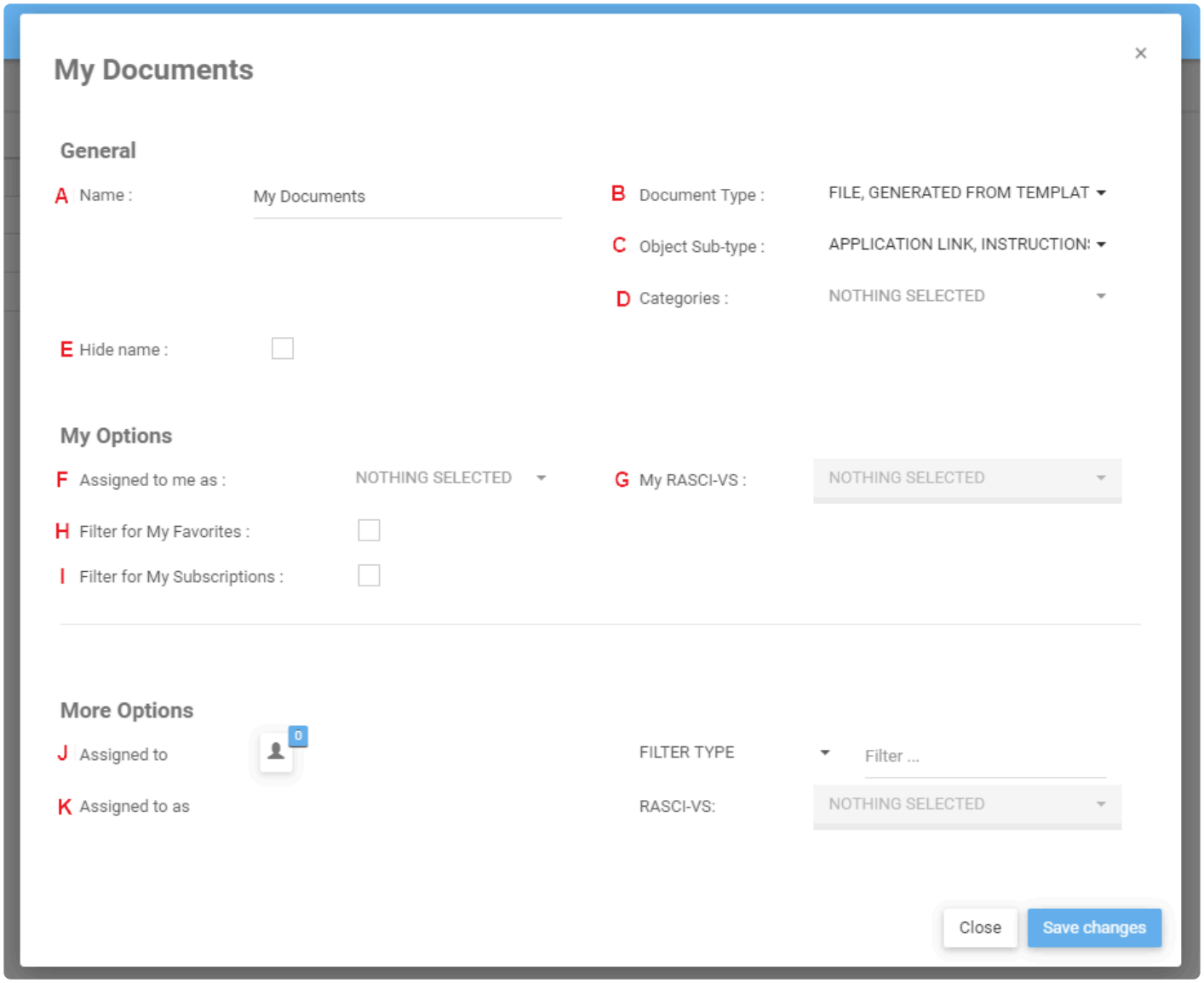
4. Click on the "Settings" option and a pop-up window will be generated as follows



5. After customizing the settings, click on the Save changes button to save the changes made.

My Documents Widget Settings Parameters

In the settings window, there are a number of parameters that a user can use to customize “My Documents” widget and improve their Home Page.



Item	Setting	Purpose
A	Name	Allow user to customize the title of the Widget.
B	Document Type	The primary filter of the “My Documents”. Allow users to select a specific document type to be featured.
C	Object Sub-Type	Allow users to filter by the assigned object sub-types (sub-types can be manually assigned in the properties of an object).
D	Categories	Allow users to filter by the assigned object categories (categories can be manually assigned in the properties of an object).
E	Hide Name	Allow users to hide the display name of the widget.
F	Assigned to me as	Allow users to filter through their assigned Roles and Resources.
G	My RASCI-VS	Allow users to organize their Roles and Resources based on their level of

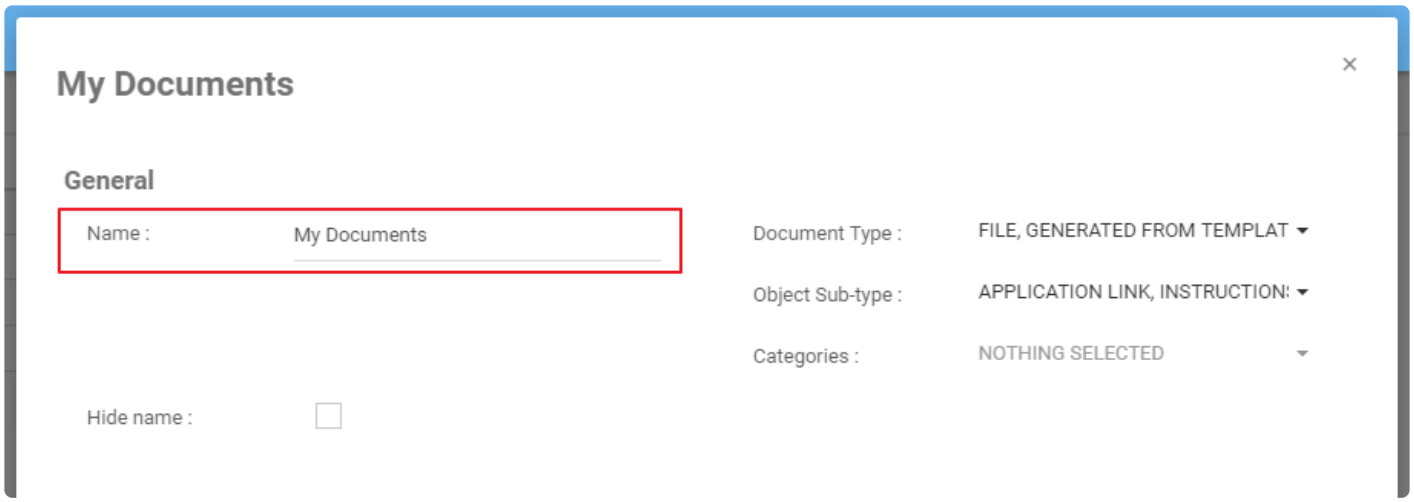
		involvement.
H	Filter for My Favorites	Allow users to sort specific objects by favorites vs. non-favorites.
I	Filter for My Subscriptions	Allow users to sort specific objects by subscribed items.
J	Assigned to	Allows users to filter objects that are related to other Roles, Resources, Org Units and Assets.
K	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, documents 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

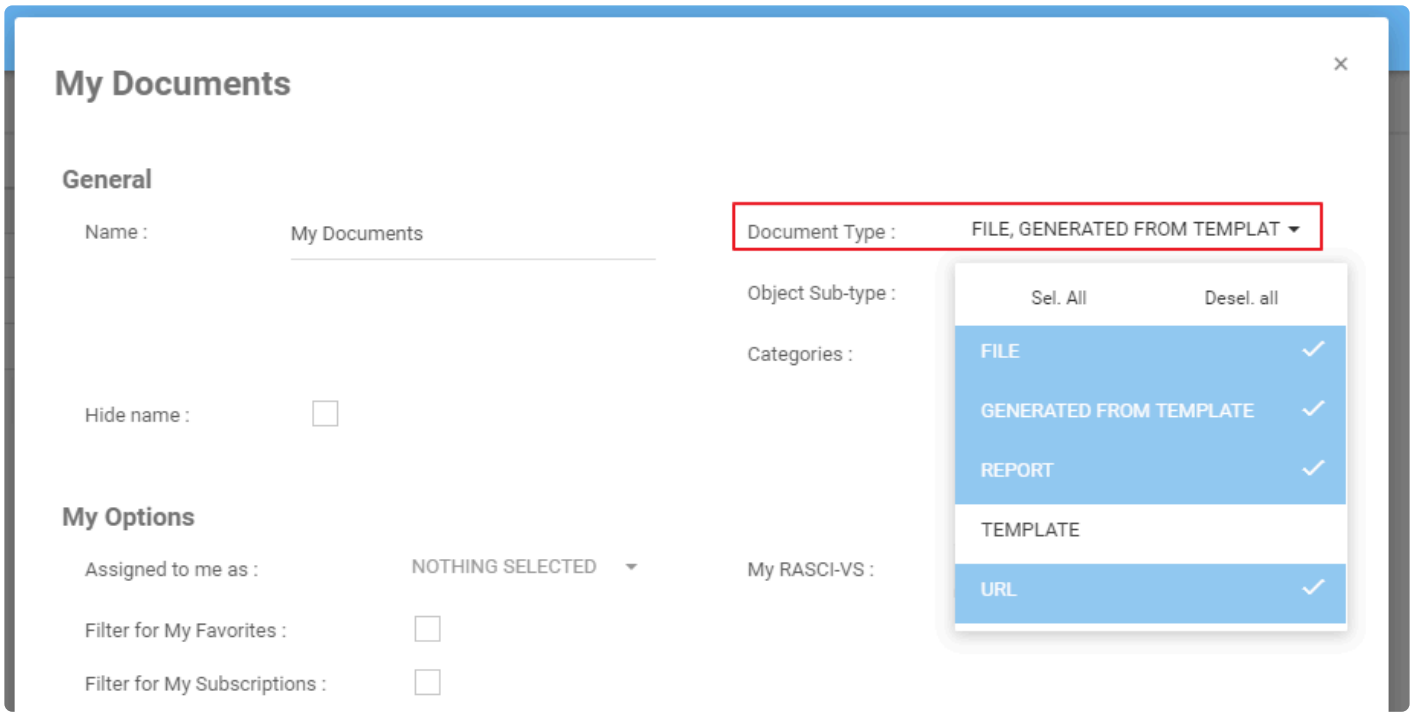
ii. Edit name by selecting name box and typing in desired name



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

i. Navigate cursor over the Document Type task bar

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



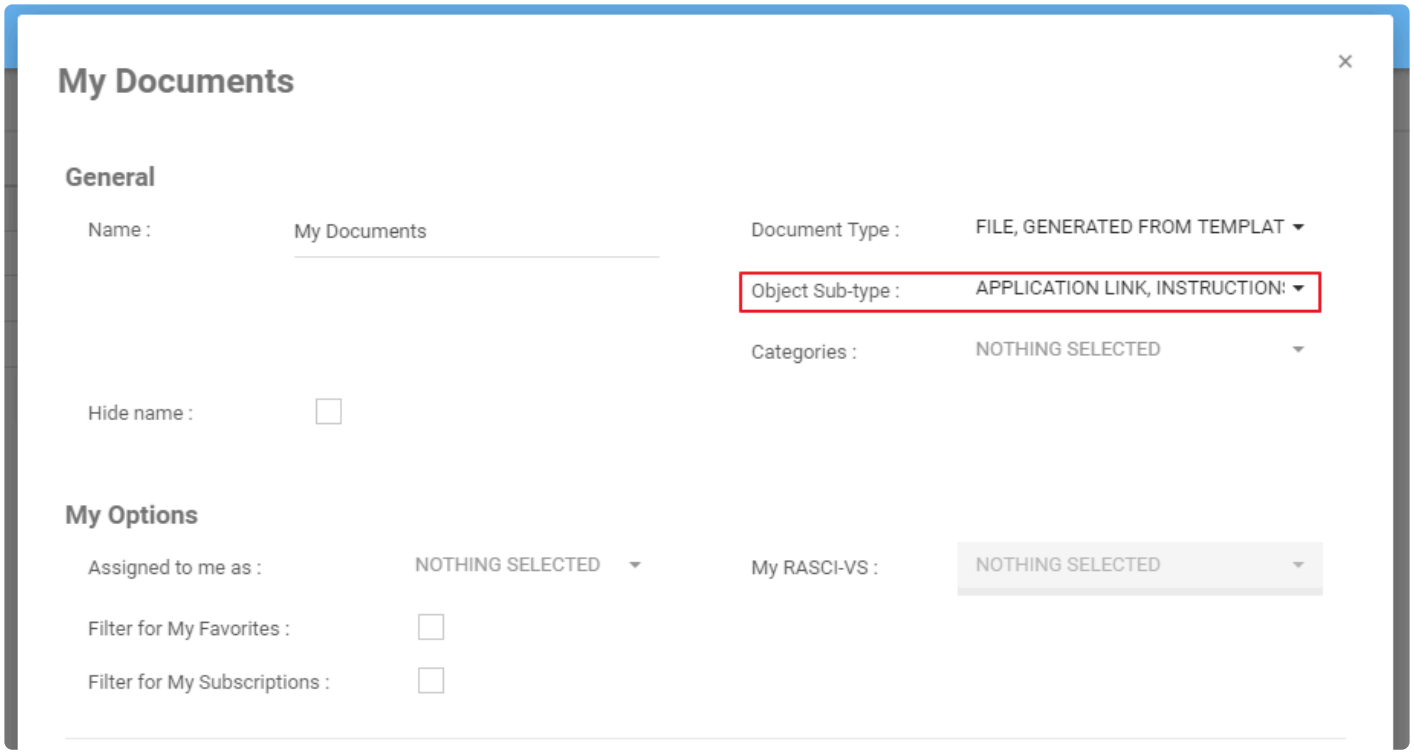
iii. Select/Deselect desired Document(s) to be featured in Widget window by navigating cursor and clicking on respective Document Types. Additionally, the drop-down menu features Select All and Deselect all buttons that can be used for mass selection.

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

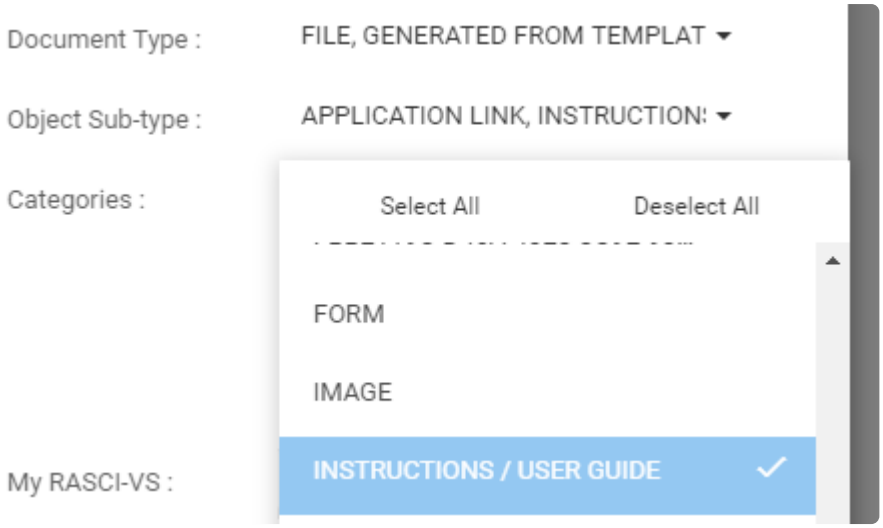
C. **Object Sub-Type:** Users can use sub-type as an additional filter. This will filter for the selected object type that has a particular sub-type assigned. Sub-Types can be defined by administrators. These sub-types can then be associated to any object in EPC in the object's properties. Users can filter for multiple sub-types across document types. To learn more about sub-types, click here.

Users can select multiple sub-type for documents. To add a filter, follow these steps:

i. Select the Object Sub-Type dropdown



ii. This will generate a dropdown of possible sub-types based on the object type

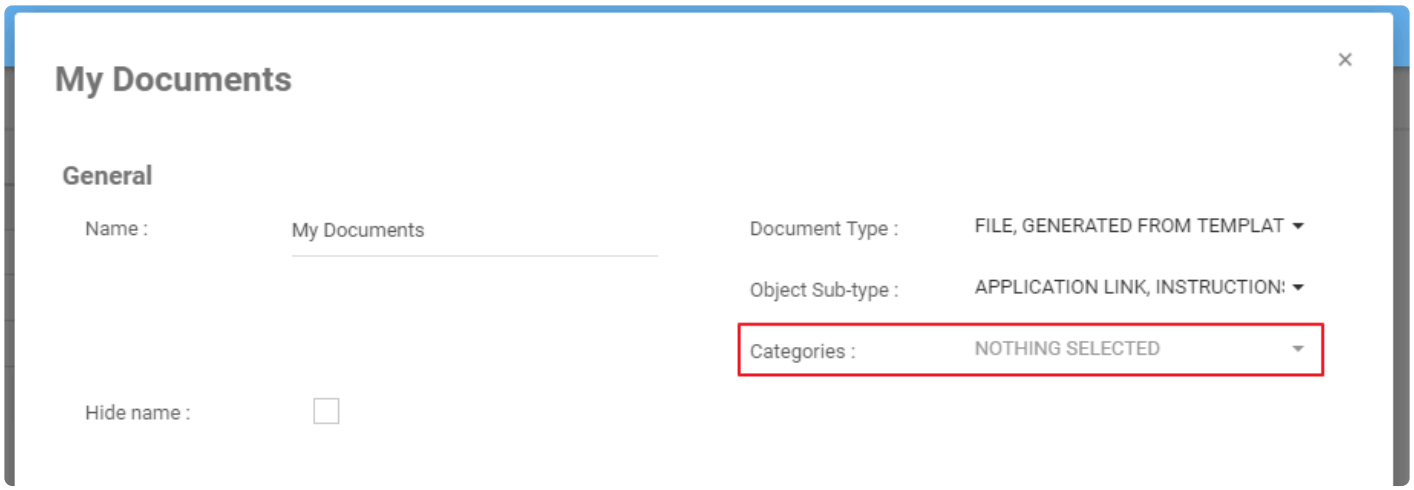


iii. Select one or more sub-type to apply the filter

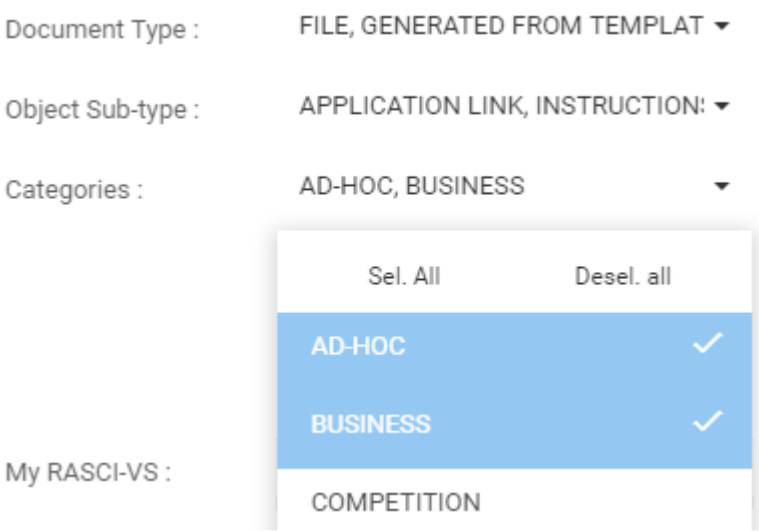
D. **Categories**: Objects in EPC can be assigned multiple categories, depending on business needs. Categories are used to classify objects; users might want to filter all processes and assets that are currently outsourced and belong to the IT department. In this case, the “Outsource” and “IT” categories would be used as filters. Note that since multiple categories can be assigned to a single object, users are able to select many object types. To learn more about categories, click here.

To filter objects by categories, follow these steps:

i. Select the Categories dropdown

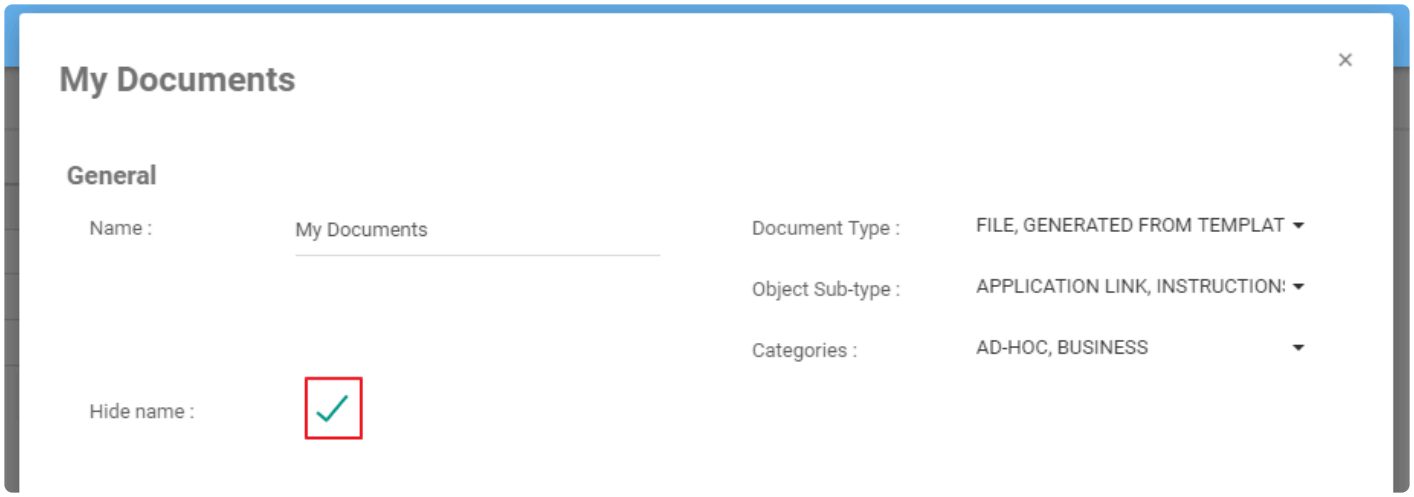


ii. This will generate a dropdown list

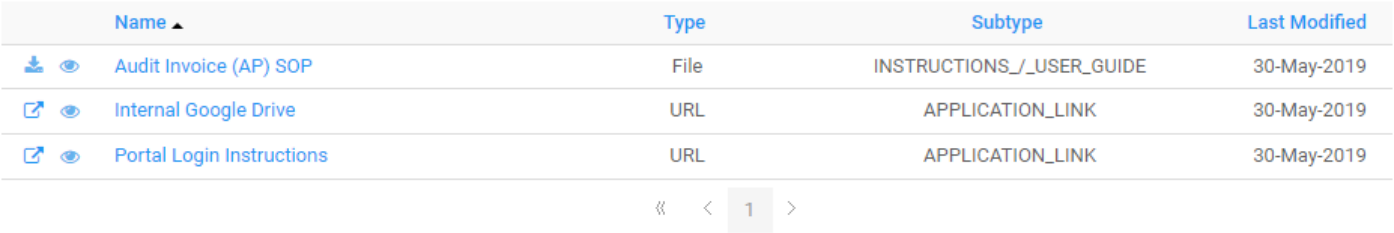


iii. Select one or more categories to apply the filter

E. **Hide Name**: To hide the display name of the widget, select this option.



The widget will appear in your page without its display name.

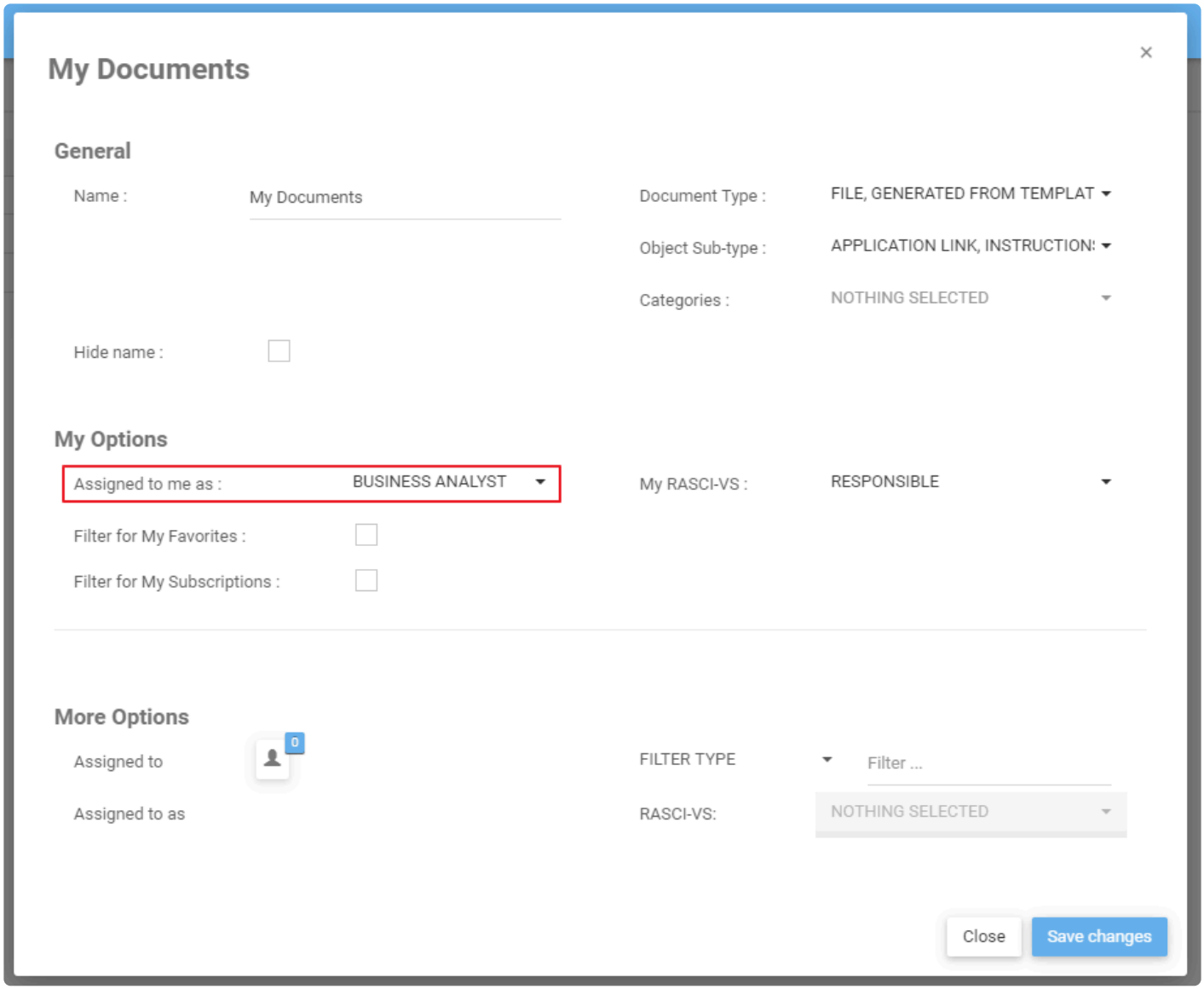


Name	Type	Subtype	Last Modified
Audit Invoice (AP) SOP	File	INSTRUCTIONS_/_USER_GUIDE	30-May-2019
Internal Google Drive	URL	APPLICATION_LINK	30-May-2019
Portal Login Instructions	URL	APPLICATION_LINK	30-May-2019

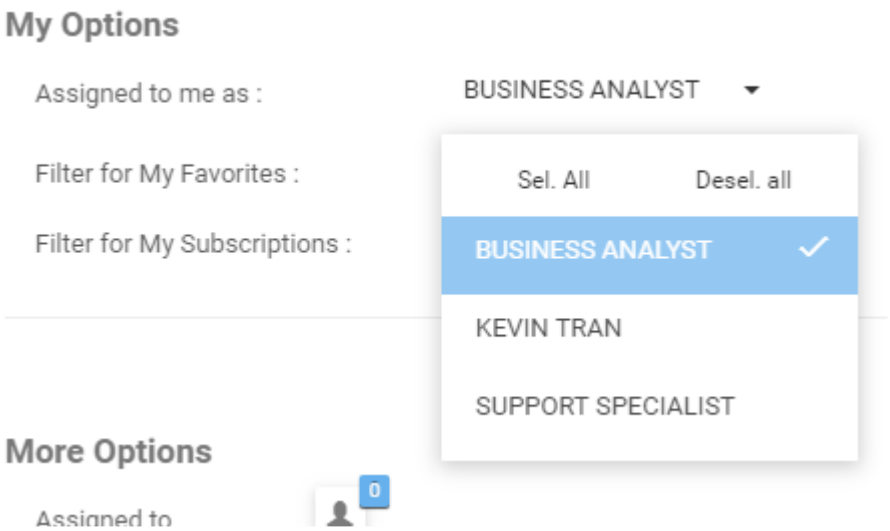
F. **Assigned me to as:** Roles will be assigned to users by EPC Modelers. Individuals can be assigned one or multiple roles, depending on their versatility within an organization. The reason individuals are often assigned multiple roles that do not necessarily mirror their job contract is to effectively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



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 (Business Analyst and Support Specialist) and with his specific resource profile (Kevin Tran).



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

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

ii. This generate a drop-down menu

iii. Select the Role or Resource you would like to feature in the Widget by clicking on the item in the list. You can select several filters at once.

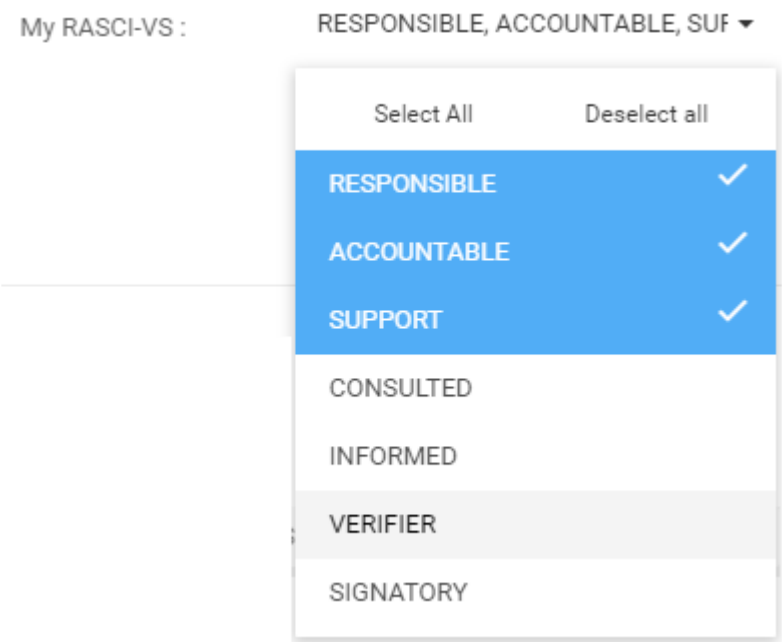
> Users can be assigned multiple roles within an organization. This is a common case in dynamic organizations with diversely-skilled workers.

G. **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.

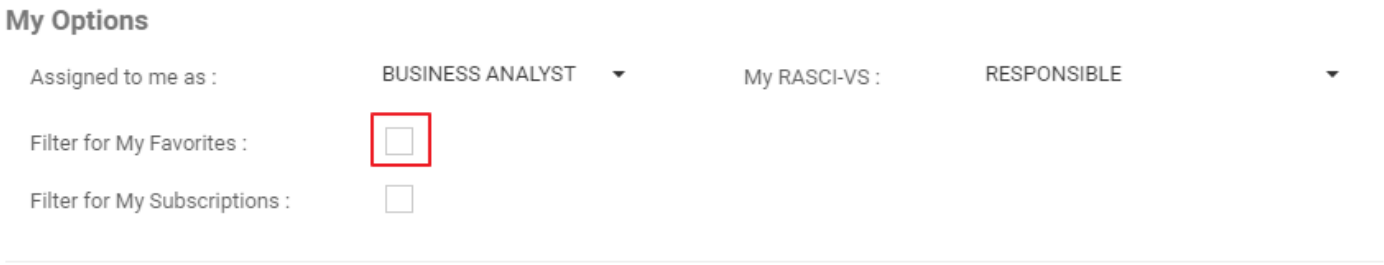
Users can select multiple different filters should a user want to include more information within the given Widget.



> 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 Documents with the RASCI-VS criterion

H. **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 Documents that are favorited by a user.

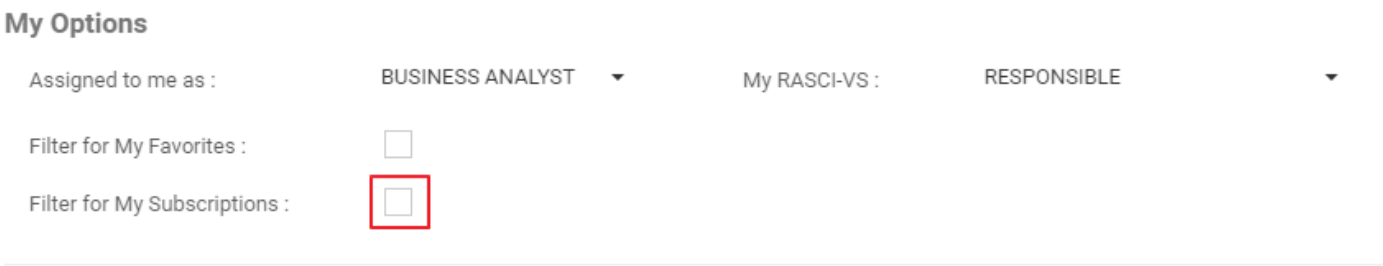
i. To "Filter for My Favorites" , navigate cursor over tic-box



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

I. **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 Documents that the user is subscribed to.

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



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

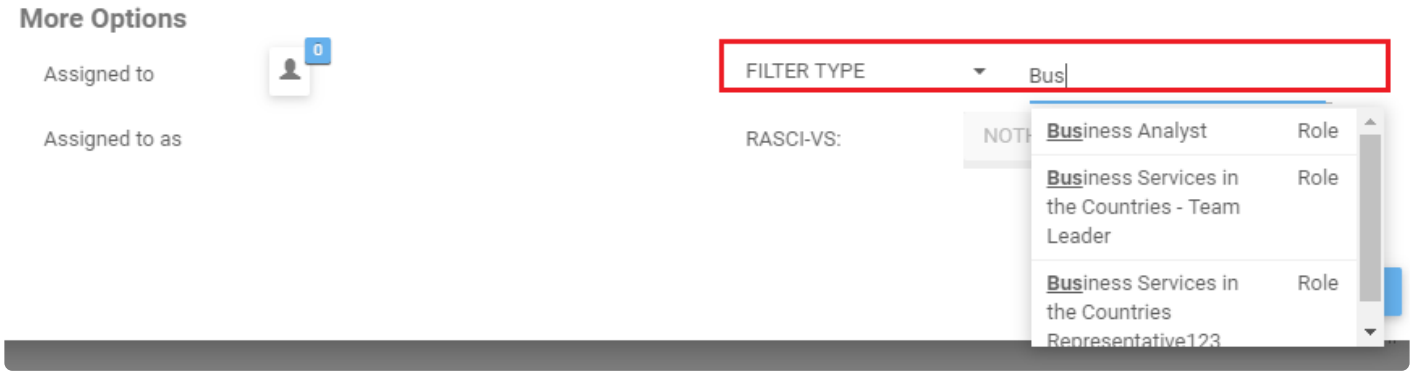
J. **Assigned to:** This filter is designed for users to view Documents that are associated with specific Roles, Resources, Org Units and Assets within the organization.

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

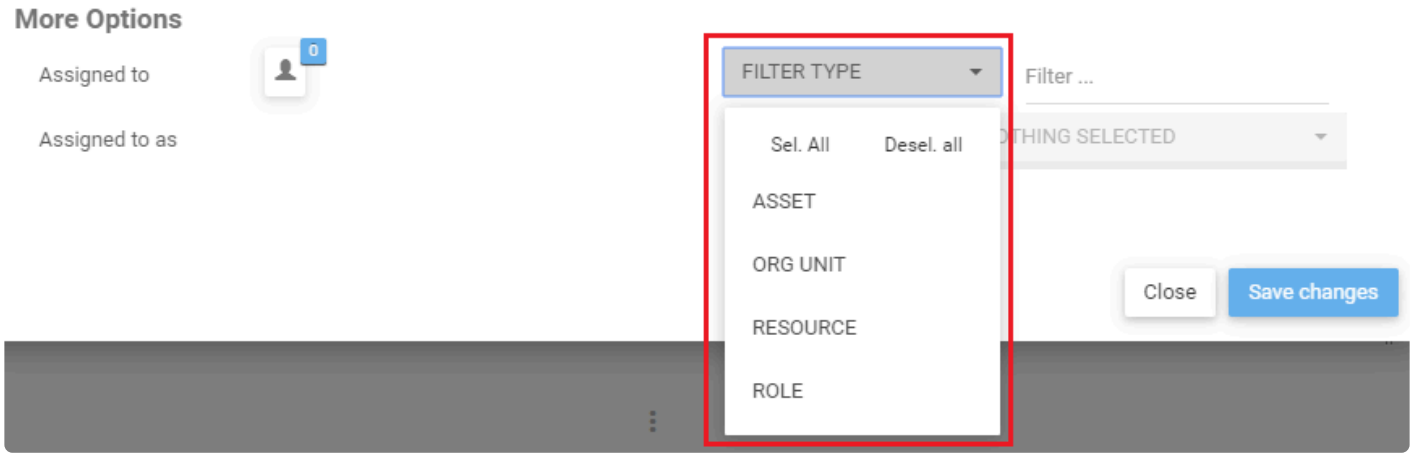
To use the “Assigned to” filter, please see the following steps

i. Navigate to the My Documents – Settings page

ii. Click on the search bar. A list of all org units, assets, roles and resources will be generated. Start typing to search for a specific object.

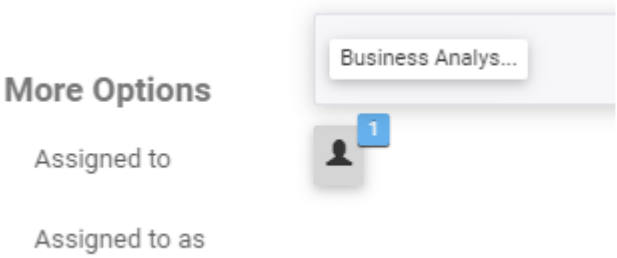


iii. To set a filter, click on **Filter Type**. Select the desired filter. Note that multiple filters can be selected.



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 1 icon on the left hand-side of the page. To confirm that a user has selected the right object, click on the icon to display the selected filters.



K. **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 Documents, 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.

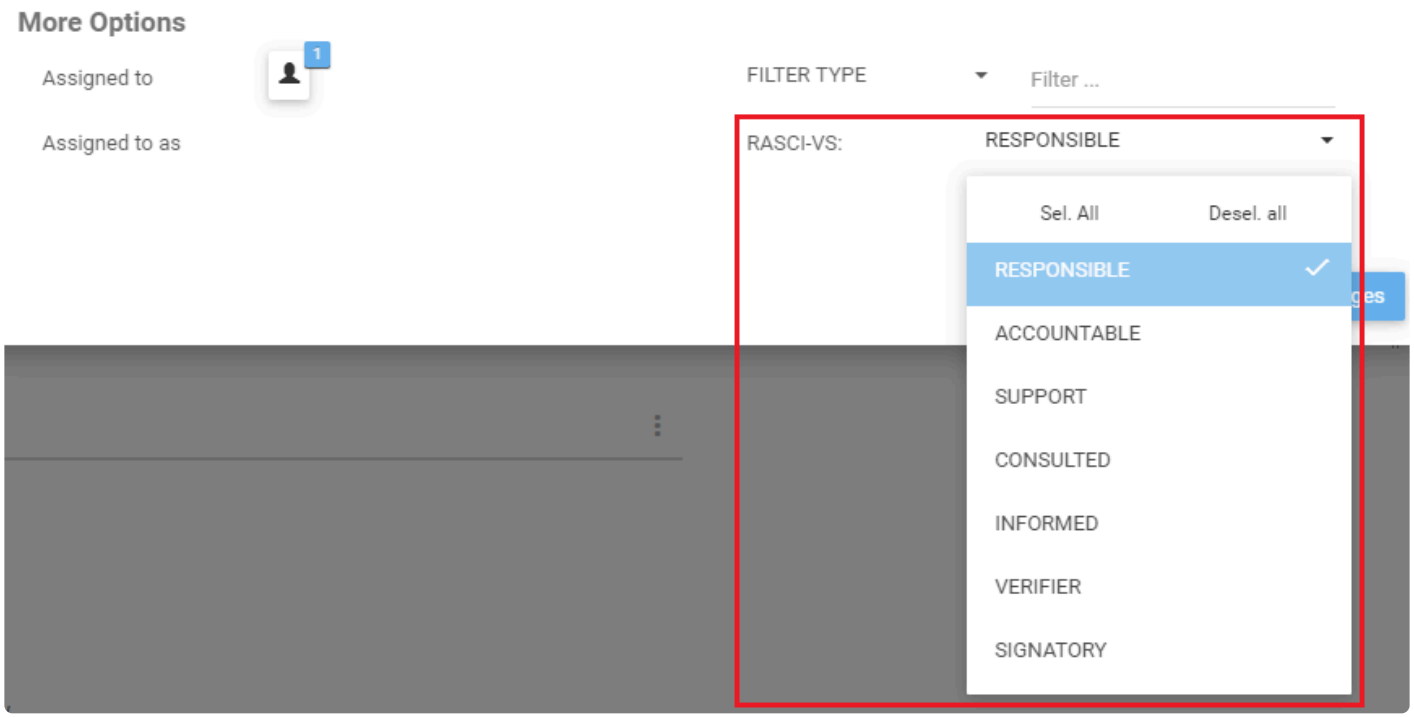
To filter using the Assigned to as function, please see the following instructions:

i. Navigate to the My Documents – 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. Click on the item and it will generate a drop-down menu



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

4.2.1.1.5 My Performance Widget

The “My Performance” Widget allows users to feature a list of company, department and personal Performance Measures. This allows users to keep track of the Performance Measures and have easy access to them on the Home Page.

This Widget allows users to monitor Performance Measures of their processes and business activities in a customizable and color coded environment with up-to-date information. To read more about the Performance Module, click here.

Users can filter the Widget by the following indicators:
1. Key Performance Indicators (KPIs)
2. Key Control Indicators (KCIs)
3. Key Risk Indicators (KRIs)

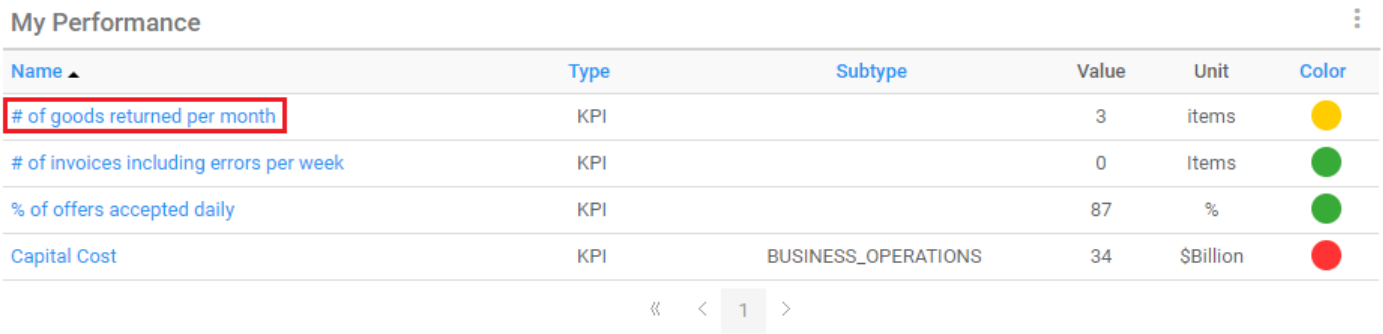
My Performance Widget Components

Component	Description
Name	Name of the performance indicator
Type	Type of indicator
Subtype	The indicator’s assigned subtype
Value	The latest numerical value inputted for the measure
Unit	The unit that the performance measure is being measured in
Color	The corresponding color representing the current performance (Green – Above Expectations, Yellow – Acceptable, Red – Below Expectations)

My Performance Widget Navigation

1. Navigate to the Home Page and add a “My Performance” Widget using the Dashboard Manager

2. Click on the name of the Performance indicator to navigate to the item’s Details page



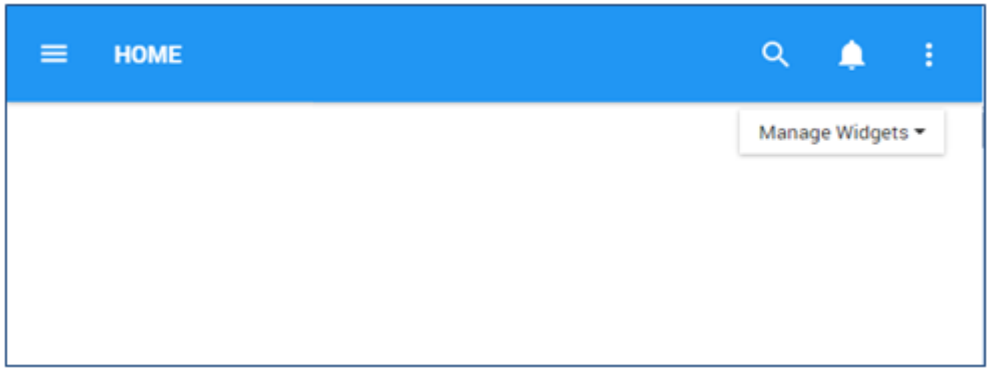
To customize the My Performance Widget, click here

4.2.1.1.5.1 Customize My Performance Widgets

The My Performance Widget allows users to feature a list of company, department and personal Performance Measures. Customizing “My Performance” will allow users to prioritize key information related to their job responsibilities and performance.

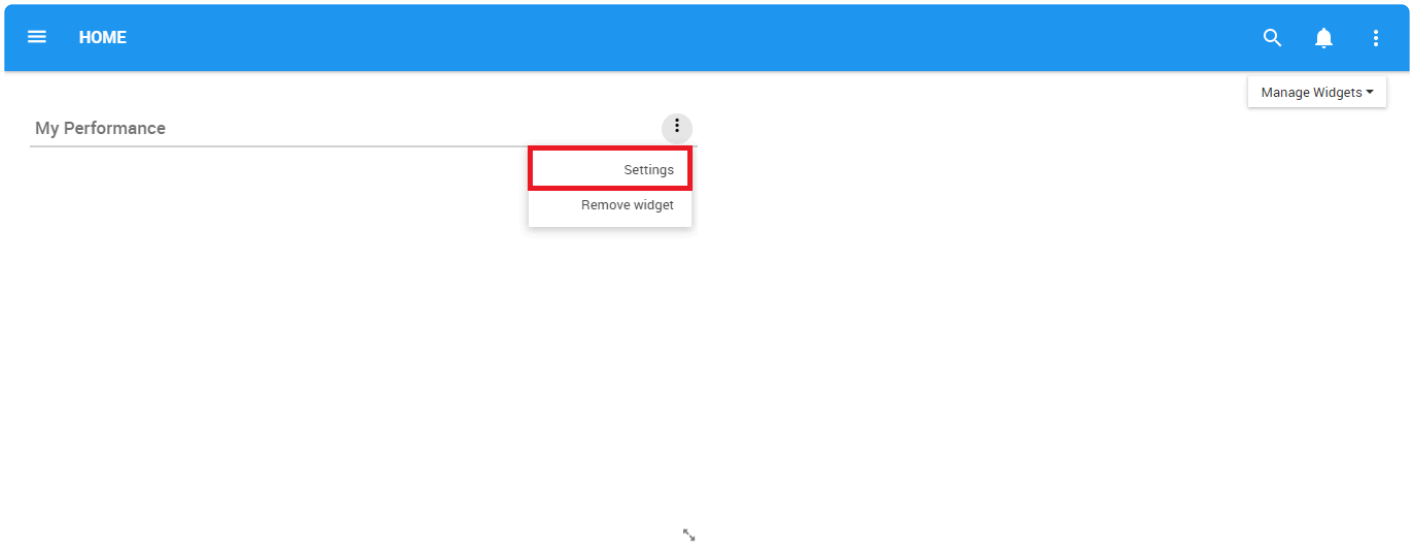
Please follow the instructions below to customize the “My Performance” Widget.

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

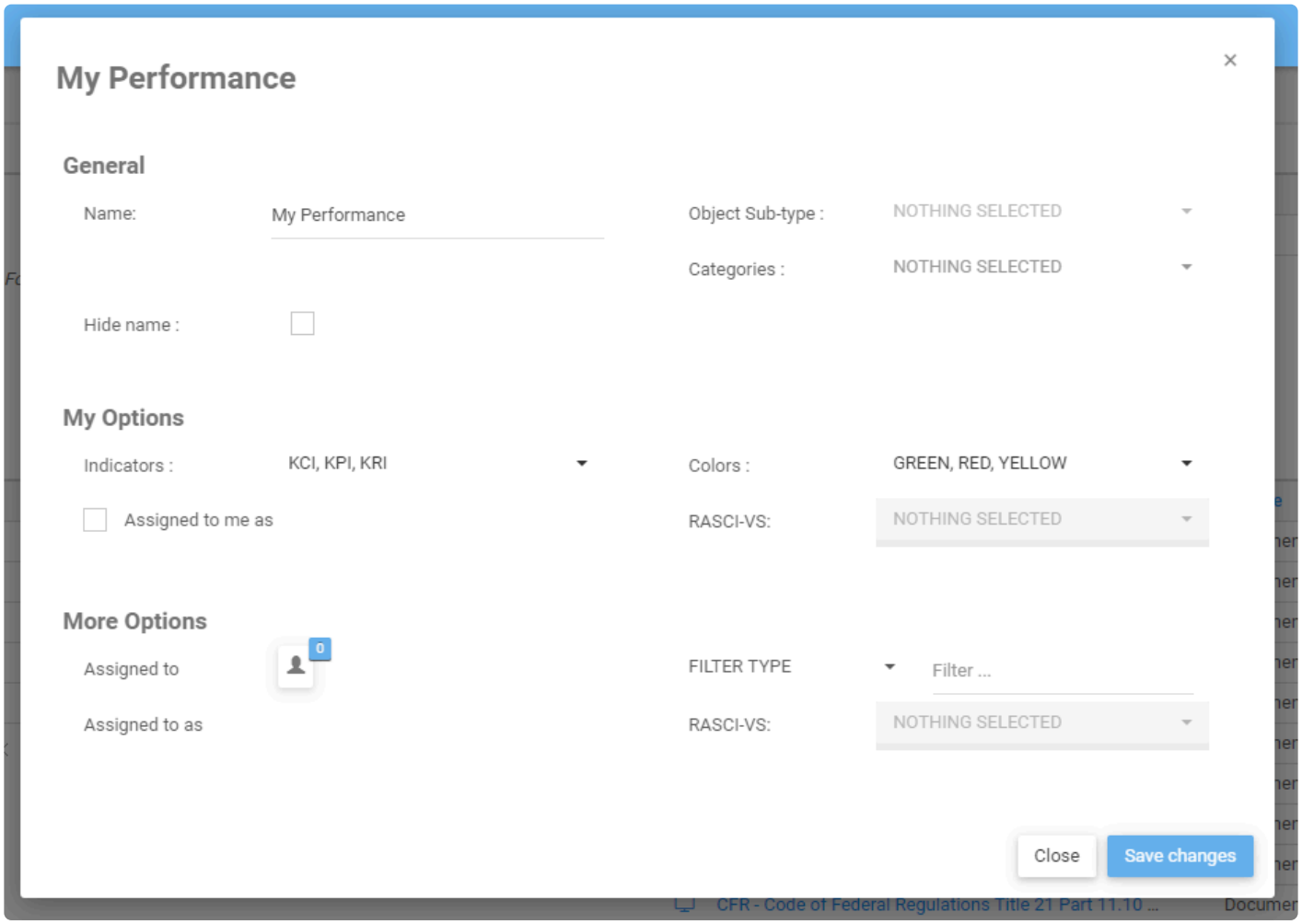


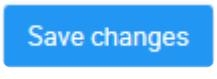
2. To add widgets to your home page, navigate to the the Manage Widgets button and select the widget you want to add from the Dashboard Manager

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

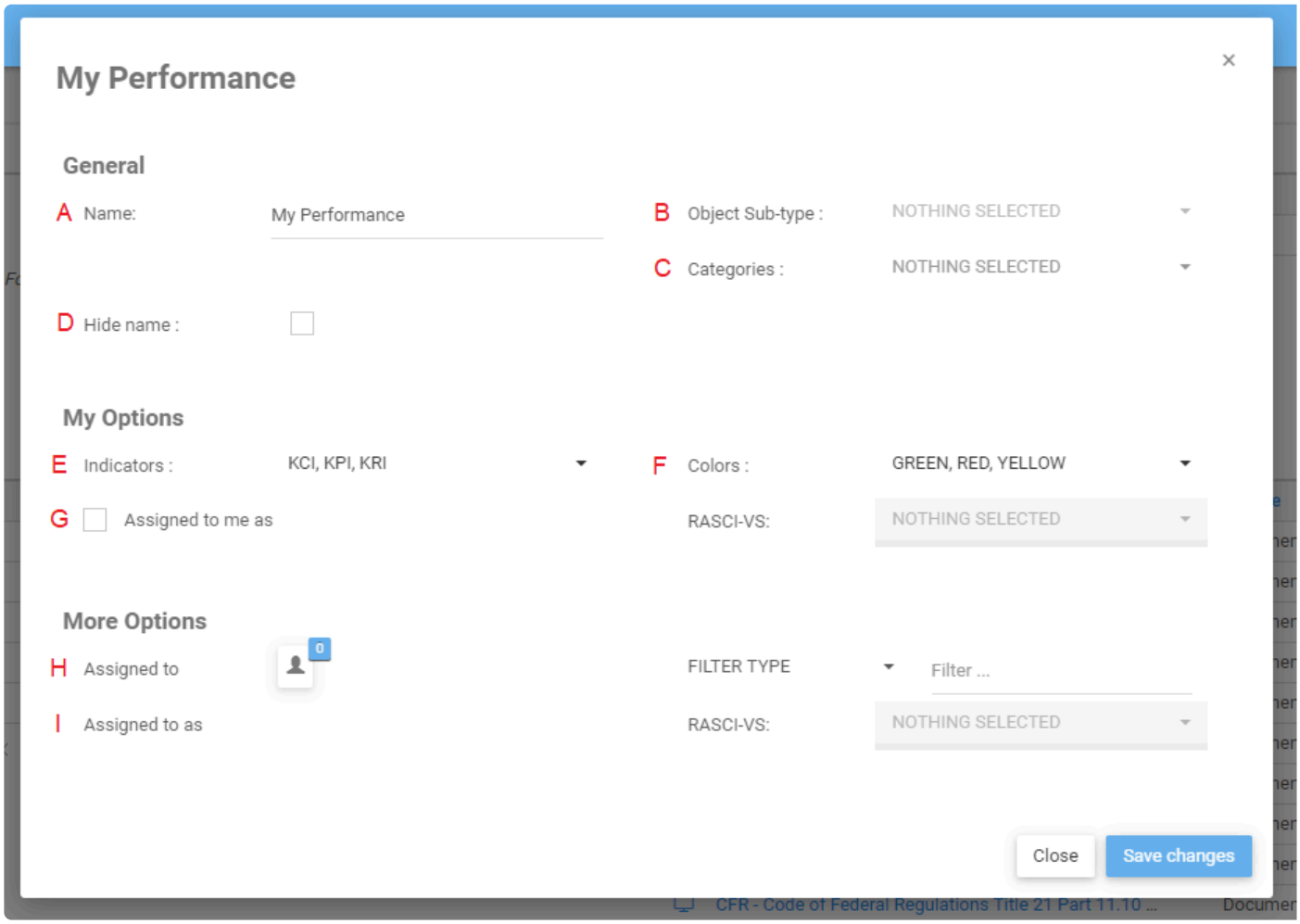


5. After customizing the settings, click on the 

button to save the changes made.

My Performance Widget Settings Parameters

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

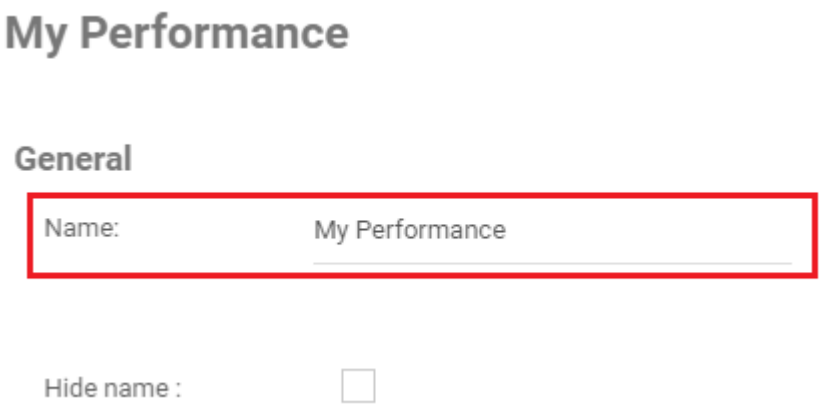


Item	Setting	Purpose
A	Name	Allows user to customize the title of the Widget
B	Sub-type	Allow users to filter by the assigned object sub-types (sub-types can be manually assigned in the properties of an object). Note that if more than 1 type of indicator is chosen under **My Options**, this field will be greyed out.
C	Categories	Allow users to filter by the assigned object categories (categories can be manually assigned in the properties of an object).
D	Hide Name	Allow users to hide the display name of the widget.
E	Indicators	Allows users to multiselect object type to be featured
F	Colors	Allows users to filter through their assigned roles (if numerous)

G	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
H	Assigned to	Allows users to filter objects that are indirectly related to an individual's personal Performance Indicators
I	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

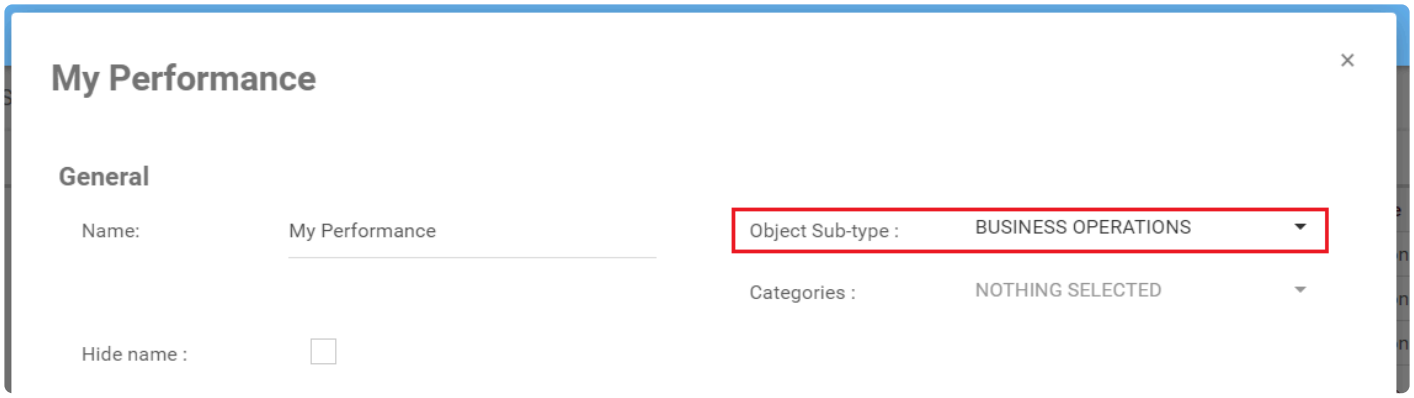
i. Edit name by selecting name box and typing in desired name



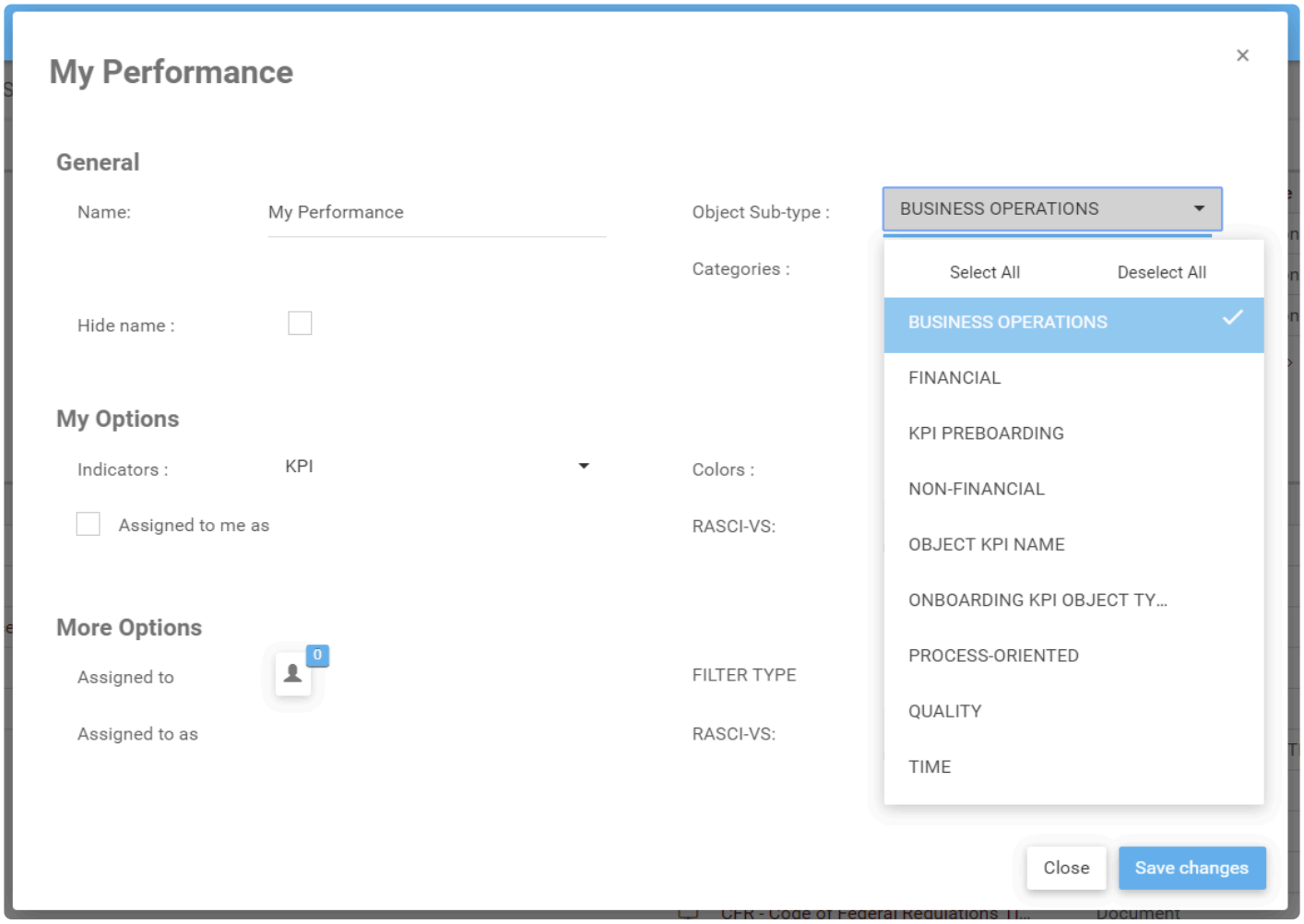
B. **Object Sub-Type:** Users can use sub-type as an additional filter. This will filter for the selected object type that has a particular sub-type assigned. Sub-Types can be defined by administrators. These sub-types can then be associated to any object in EPC in the object's properties. Users can filter for multiple sub-types across document types. Note that to enable this section, only 1 type of indicator can be chosen, since types may differ across indicators. See section E. for the indicator filter. To learn more about sub-types, click here.

Users can select multiple sub-type for documents. To add a filter, follow these steps:

i. Select the Object Sub-Type dropdown



ii. This will generate a dropdown of possible sub-types based on the object type



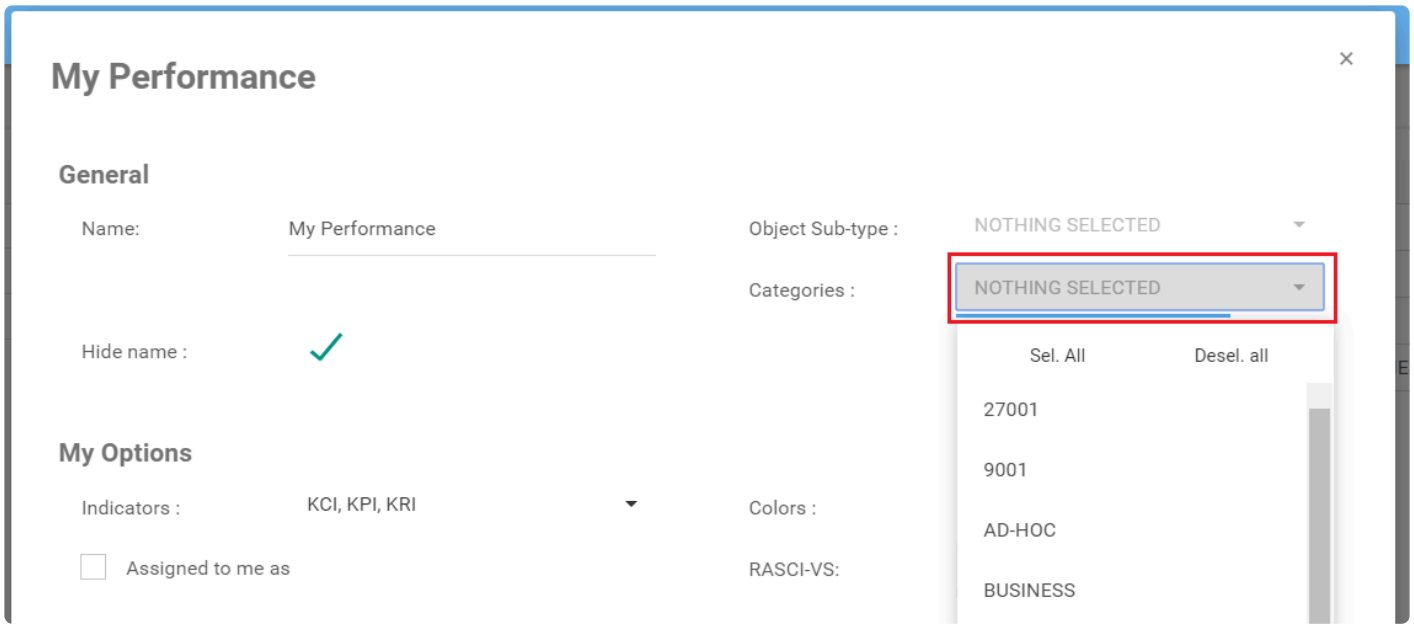
iii. Select one or more sub-type to apply the filter

C. **Categories**: Objects in EPC can be assigned multiple categories, depending on business needs. Categories are used to classify objects; users might want to filter all indicators that are applicable to a certain area of the business. Note that since multiple categories can be assigned to a single object, users are able to select many object types. To learn more about categories, click here.

To filter objects by categories, follow these steps:

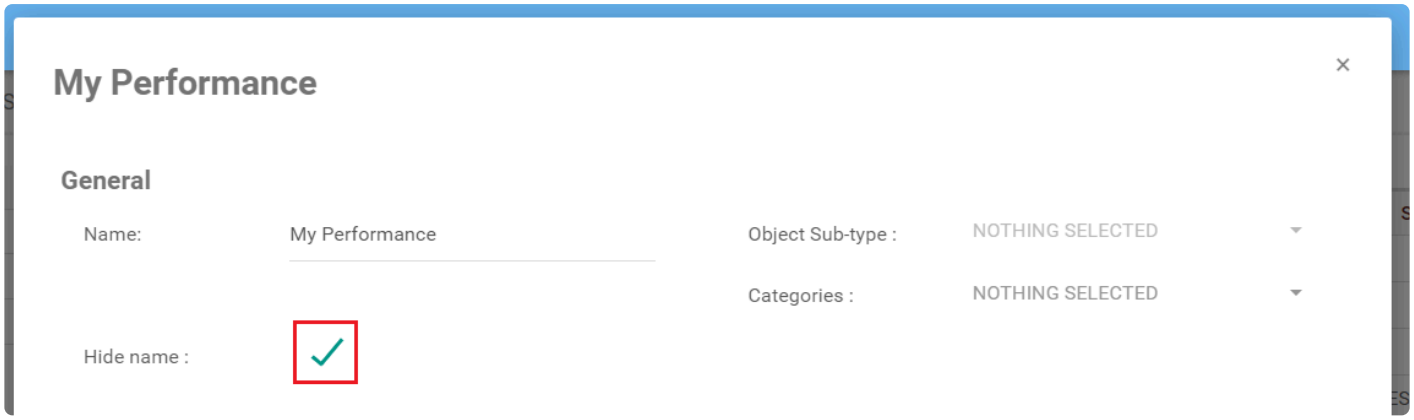
i. Select the Categories dropdown

ii. This will generate a dropdown list



iii. Select one or more categories to apply the filter

D. **Hide Name**: To hide the display name of the widget, select this option.



The widget will appear in your page without its display name.

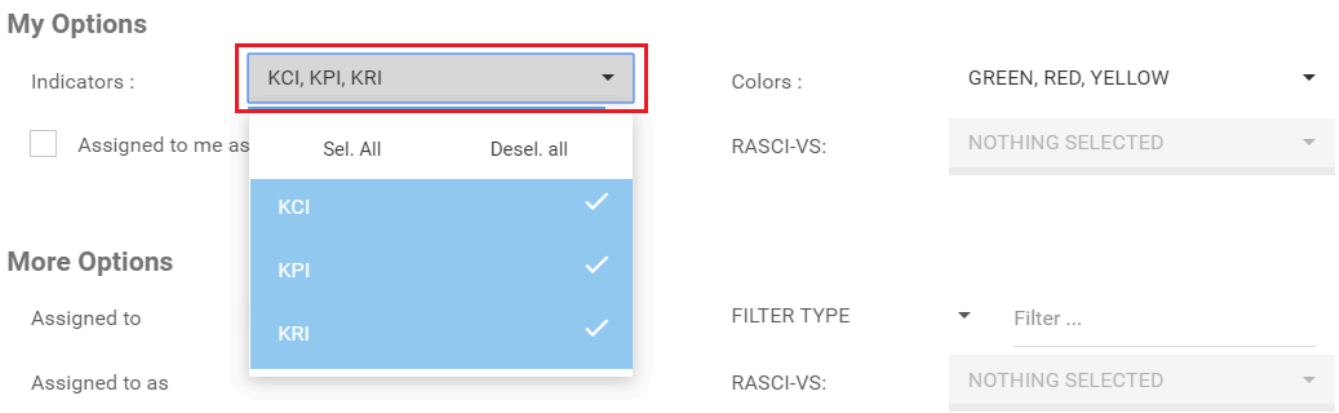
Name ▲	Type	Subtype	Value	Unit	Color
# of goods returned per month	KPI		3	items	
# of invoices including errors per week	KPI		0	Items	
% of offers accepted daily	KPI		87	%	
Capital Cost	KPI	BUSINESS_OPERATIONS	34	$Billion	

1

E. **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

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



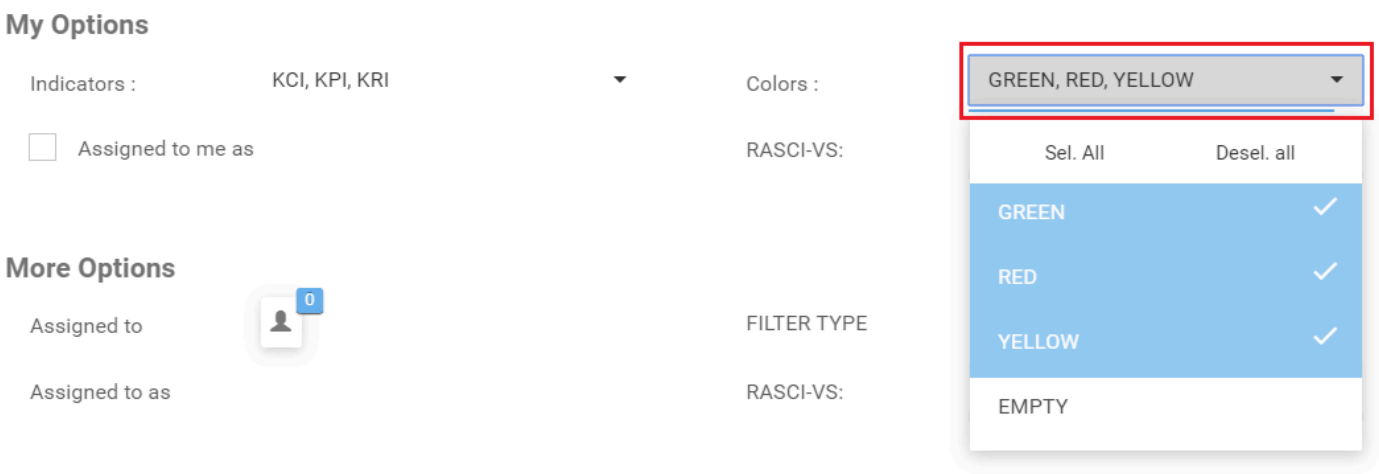
iii. Select/Deselect desired indicator(s) to be featured in Widget window by navigating cursor and clicking on respective objects.

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

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

i. Navigate cursor over the Colors task bar

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



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

G. **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.

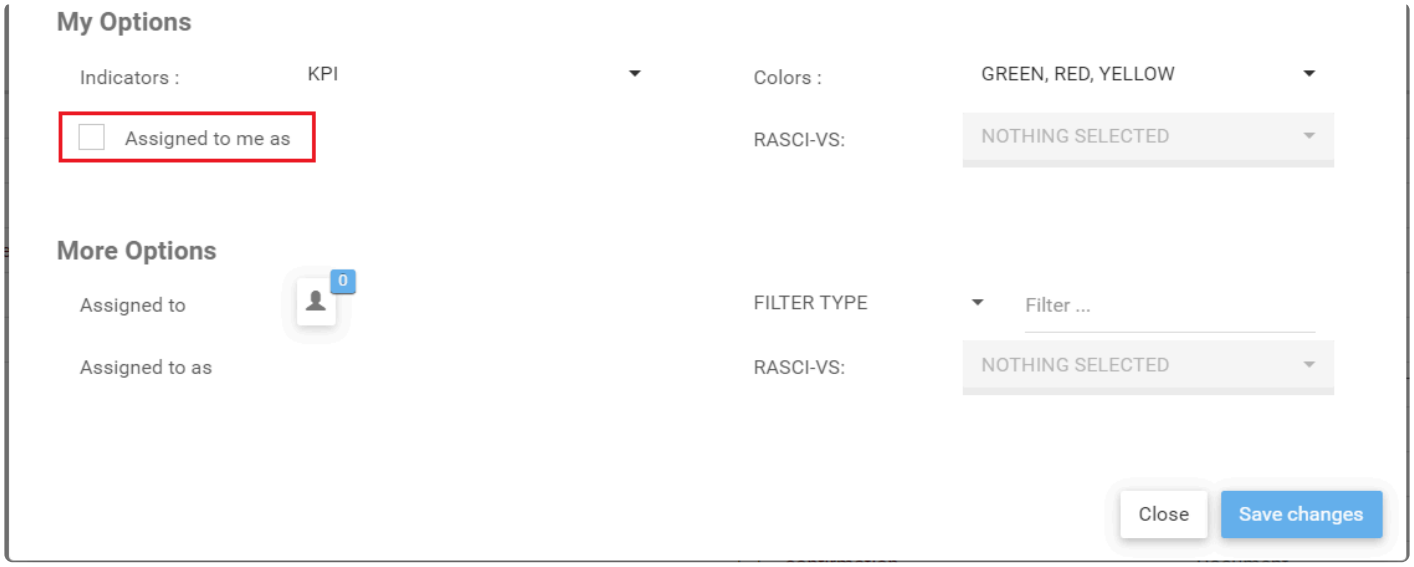
The “Assigned to me as” filter will allow users to view their Performance Indicators and the level of governance associated using the RASCI-VS Matrix.

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

i. Navigate to the My Performance – Settings page

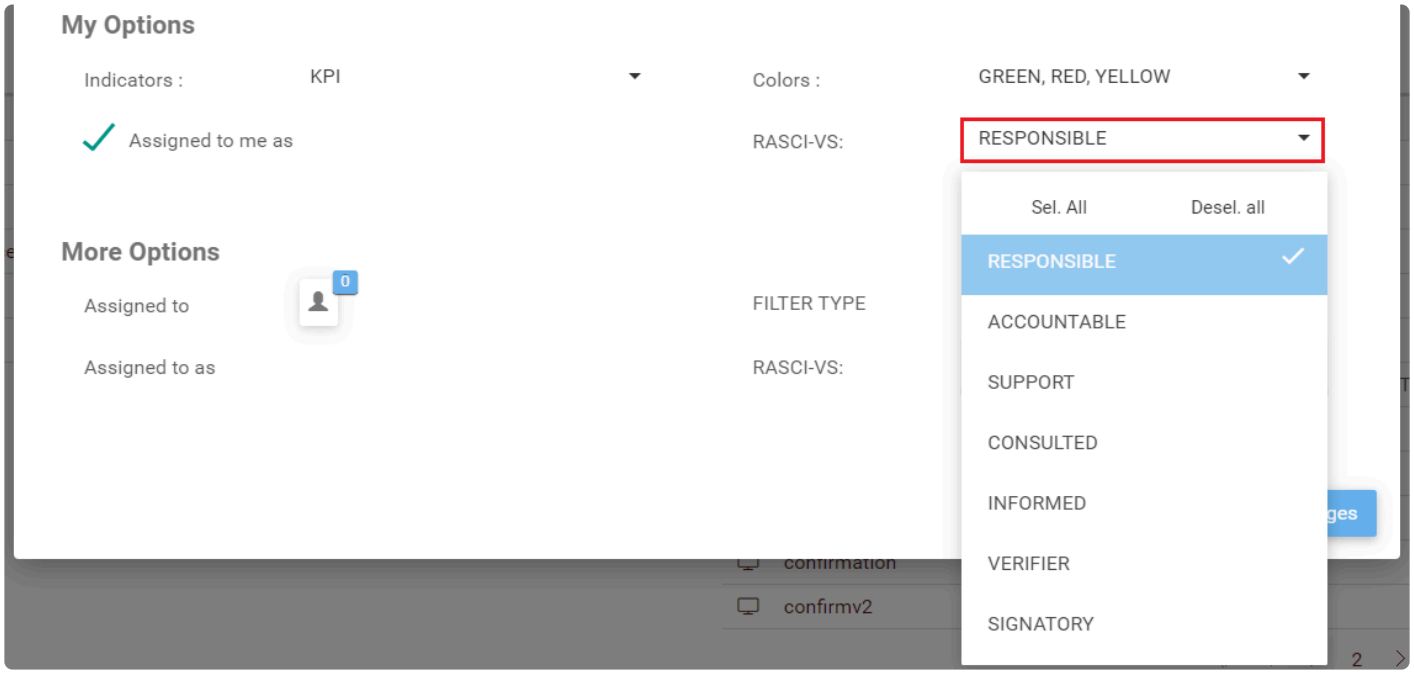
ii. On the My Performance – Settings page, navigate cursor to the “Assigned to me as” check-box. Note that the RASCI-VS criterion to the right will be **locked** until the box is selected.

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



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

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



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

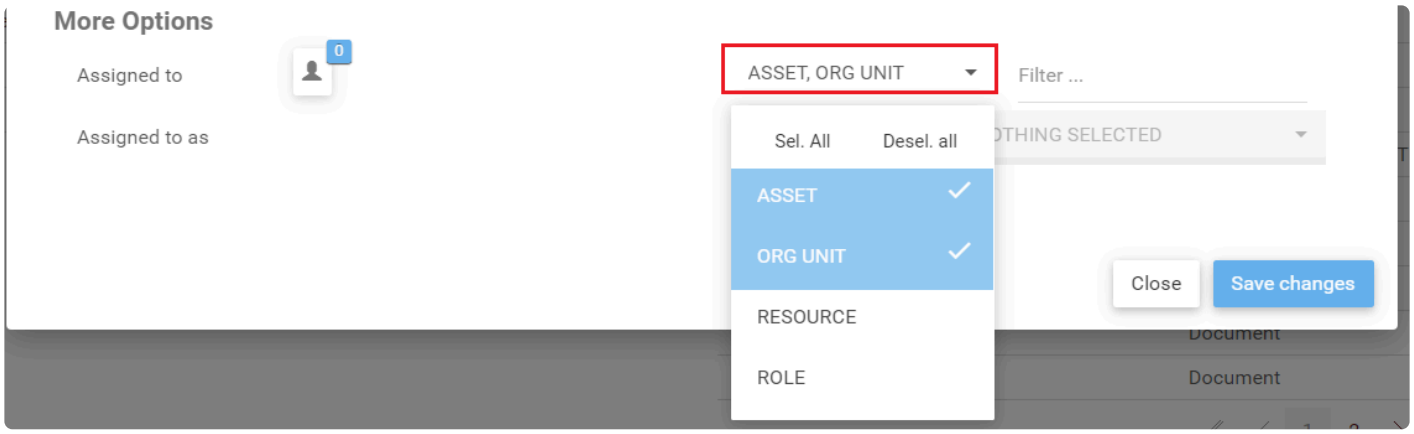
H. **Assigned to:** This filter is designed for users to view Performance Indicators that can have direct or indirect relationships with specific Roles, Resources, Assets or Organizational Units. This allows users to see which objects relate to different people and roles within the organization.

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

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

i. Navigate to the My Performance – Settings page

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



iii. A drop-down menu will be automatically generated. Select the desired filter. Note that multiple filters can be selected.

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

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

vii. The search bar has an auto-population function which allows users to easily find the specific item they are searching for. Once a user has selected the search box, the user can begin typing. The auto-population feature will generate a list featuring the used letters or words. If a user is unsure of specific spelling of a particular item, the user may also use the « » buttons listed above the auto-populated list. These are navigation arrows that let users sift through the different pages on search results generated.

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

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

l. **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.

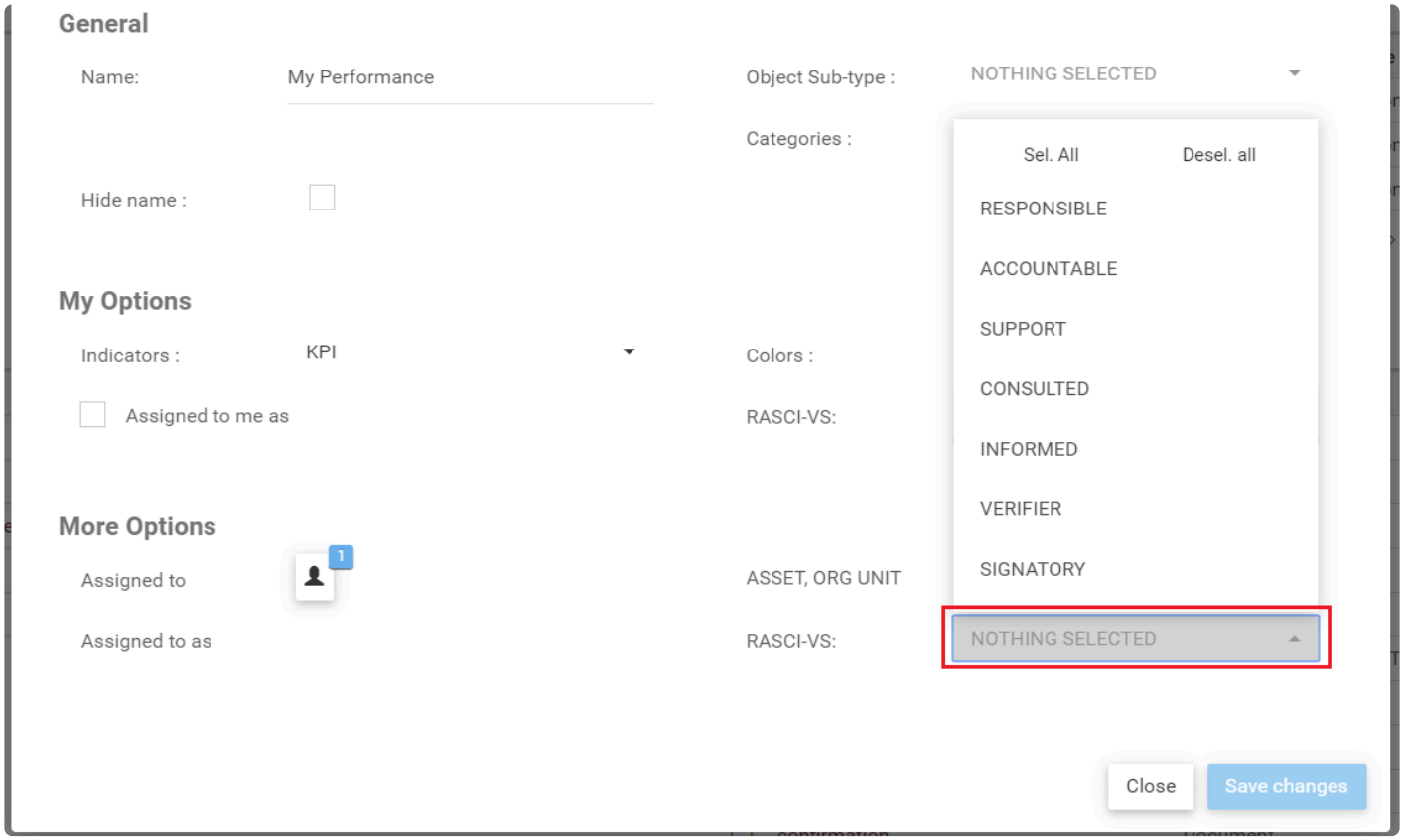
To filter using the Assigned to as function, please see the following instructions:

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

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



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

4.2.1.1.6 My Actions Widget

The “My Actions” Widget allows users to view a list of items they are actively engaging with. Once users access their Home Page, they can have easy access to a list of items they need to act upon, or are requiring their action.

There are 5 different action types that can be applied for this Widget:
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

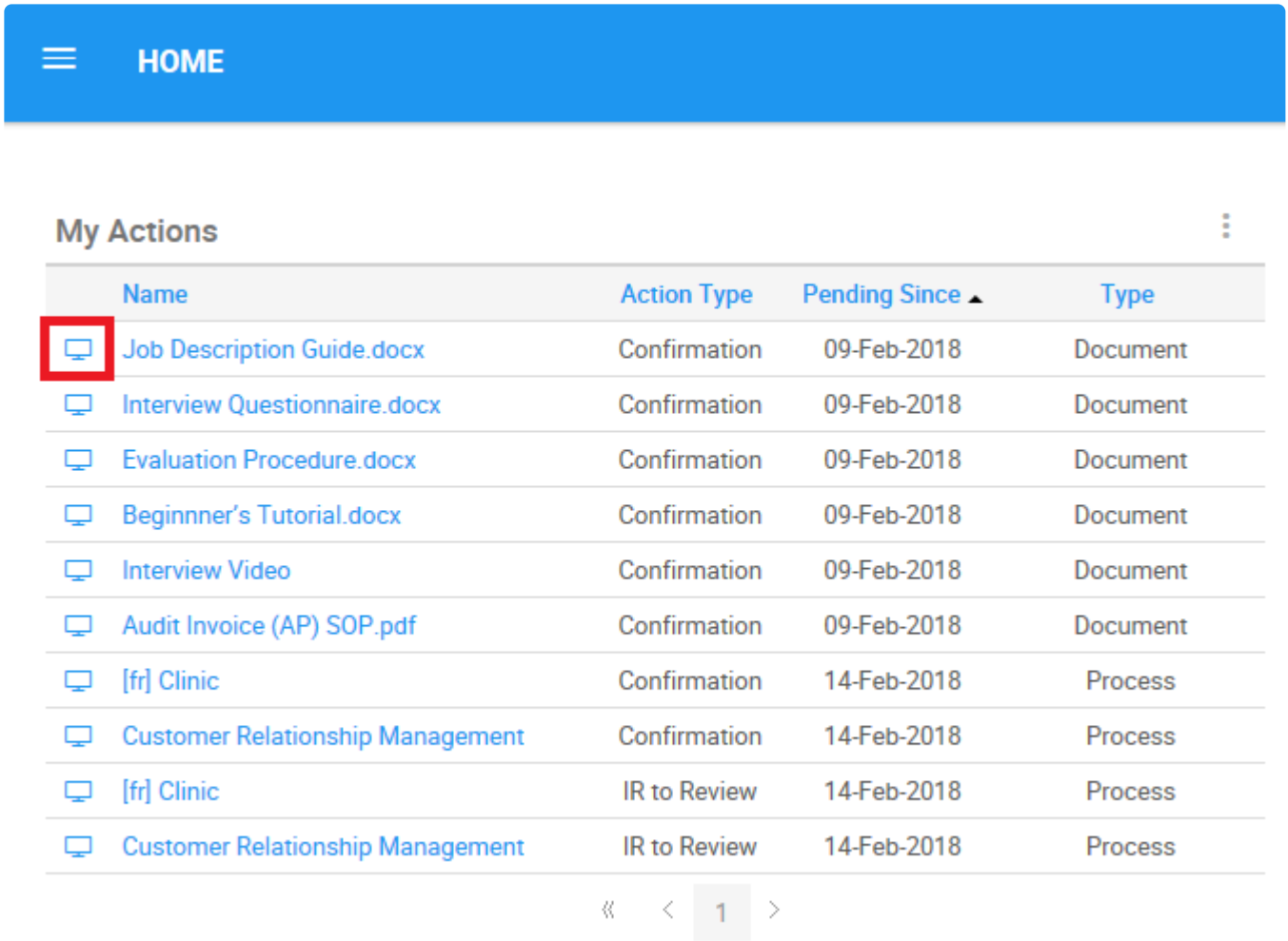
My Actions Widget Components

Component	Description
Quick Graph View Icon	: Icon allowing user to immediately view the Action in a graph mode
Name	Name of the Action
Action Type	Type of Action user is engaging with
Pending Since	The pending date where the action was sent to user
Type	Type of object

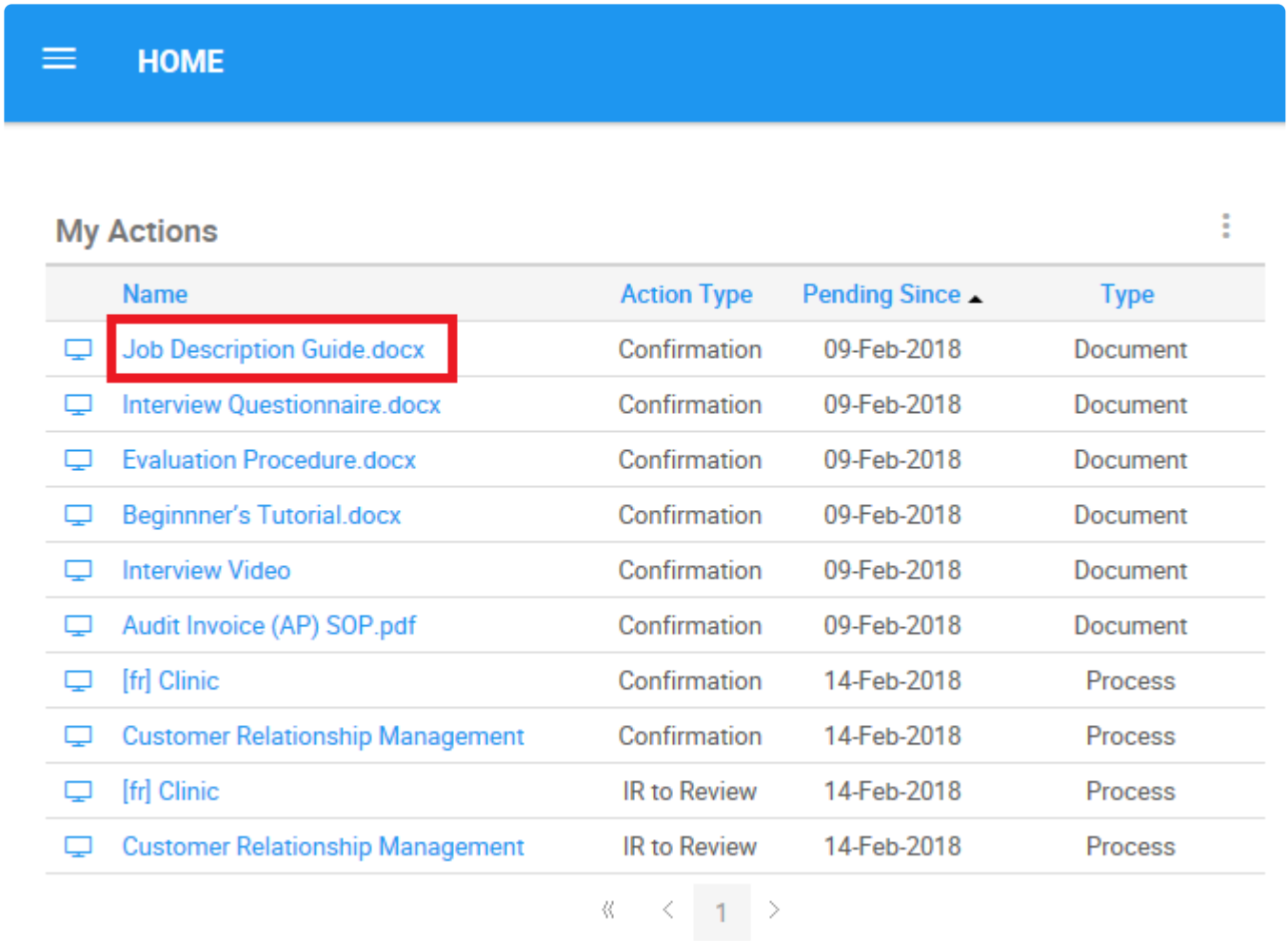
My Actions Widget Navigation

1. Navigate to the Home Page and add a “My Actions” Widget using the Dashboard Manager

2. Click on the icon to immediately view the object in a graph mode



3. Click on the name of the Document to navigate to the item's Details page



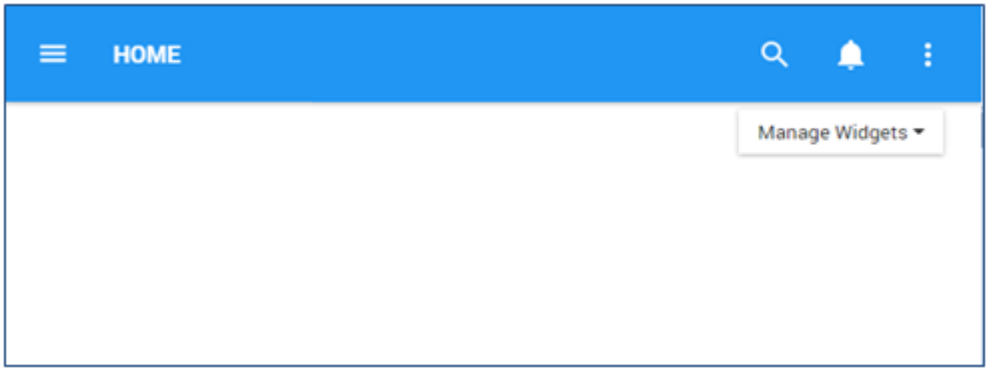
To customize the My Actions Widget, click here

4.2.1.1.6.1 Customize My Actions Widgets

The My Actions Widget allows users to view a list of items they are actively engaging with. 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.

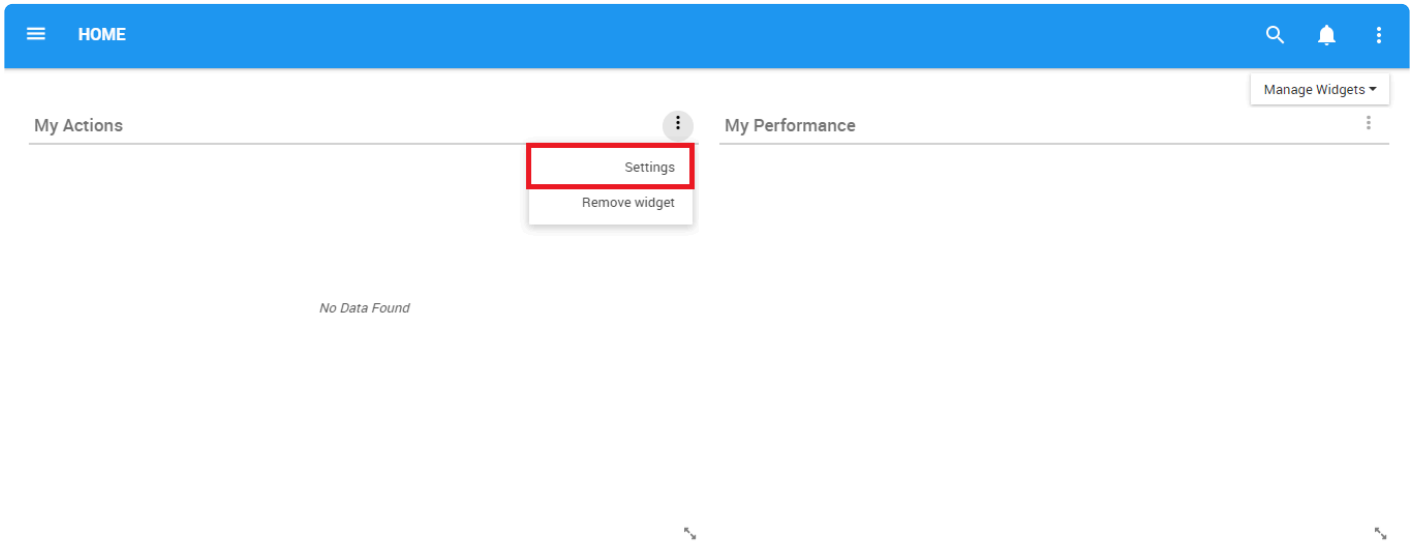
Please follow the instructions below to customize the “My Actions” Widget.

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

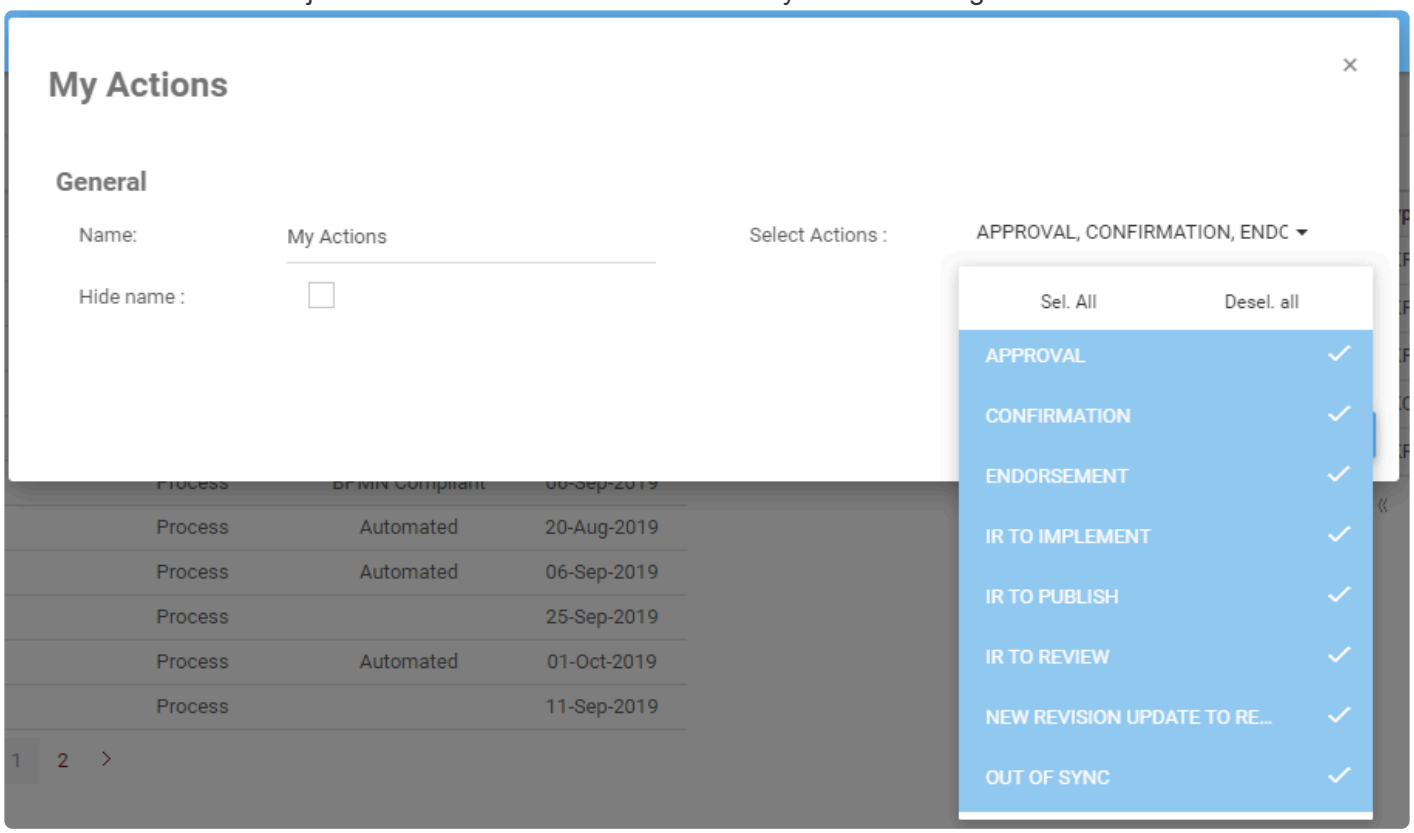


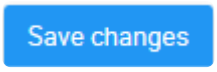
2. To add widgets to your home page, navigate to the the Manage Widgets button and select the widget you want to add from the Dashboard Manager

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



4. Users will have 3 major fields that can be edited in the “My Actions” Widget



5. After customizing the settings, click on the 

button to save the changes made.

My Actions Widget Settings Parameters

In this page there are two 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 Widget
B	Display the Following Pending Items	Display specific actions a user is responsible to take
C	Hide Name	Hide the name of the widget

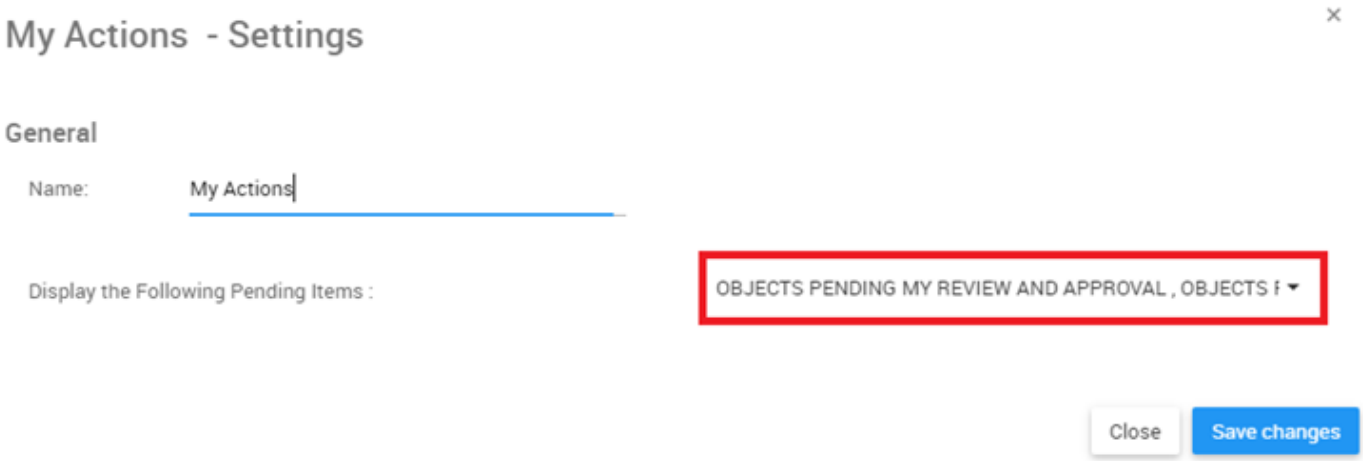
A. **Name:** The “Name” Section will allow a user to customize the name of the Widget. To edit the “Name” section, please follow the instructions below

i. Navigate cursor over existing name box

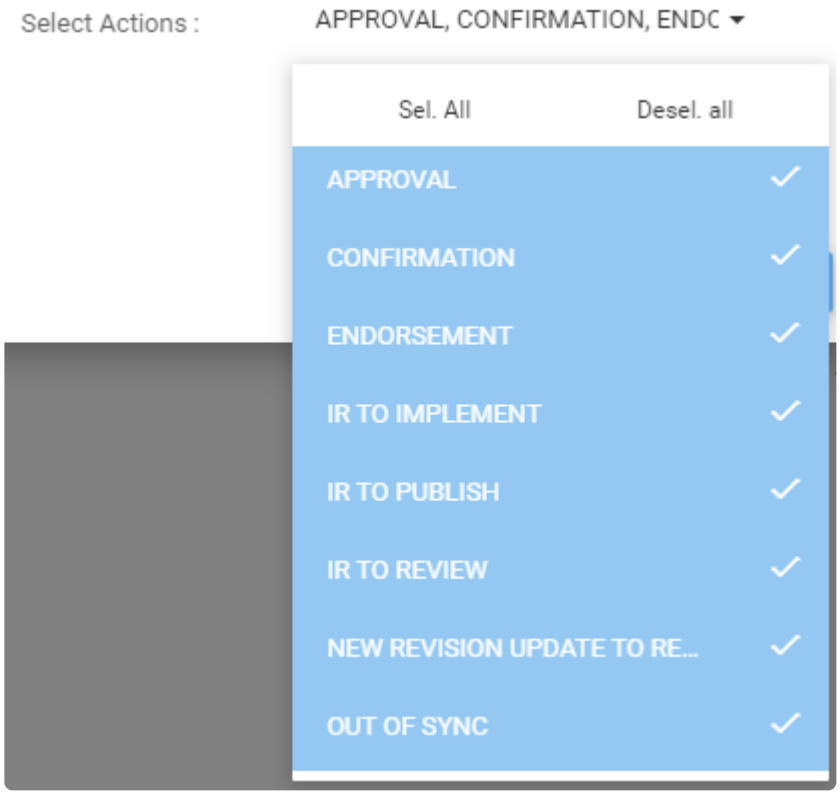
ii. Edit name by selecting name box and typing in desired name

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

i. Navigate cursor over viewing panel



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



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

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

Actions

Action	Description
Approval	For approval cycles on an object. The user must be assigned as an approver.
Confirmation	For newly published objects on which the user has a RASCI-VS value.
Endorsement	For endorsement cycles on an object. The user must be assigned as an endorser.
IR to Implement	For IRs needing implementation. The user must be assigned as Implementer and the status of the IR must be “To Implement”
IR to Publish	For IR changes needing publication. The user must be assigned as Implementer and the status of the IR must be “Implemented”
IR to Review	For IRs needing approval. The user must be Accountable on the object and there must be a new IR on the object

New Revision Update to Review	For objects that have changed status from Published to In Progress. The user must be assigned as Implementer on the object
Out of Sync	For objects that are out of sync. See Data Harmonization for more details.

4.2.1.1.7 My Performance Chart Widget

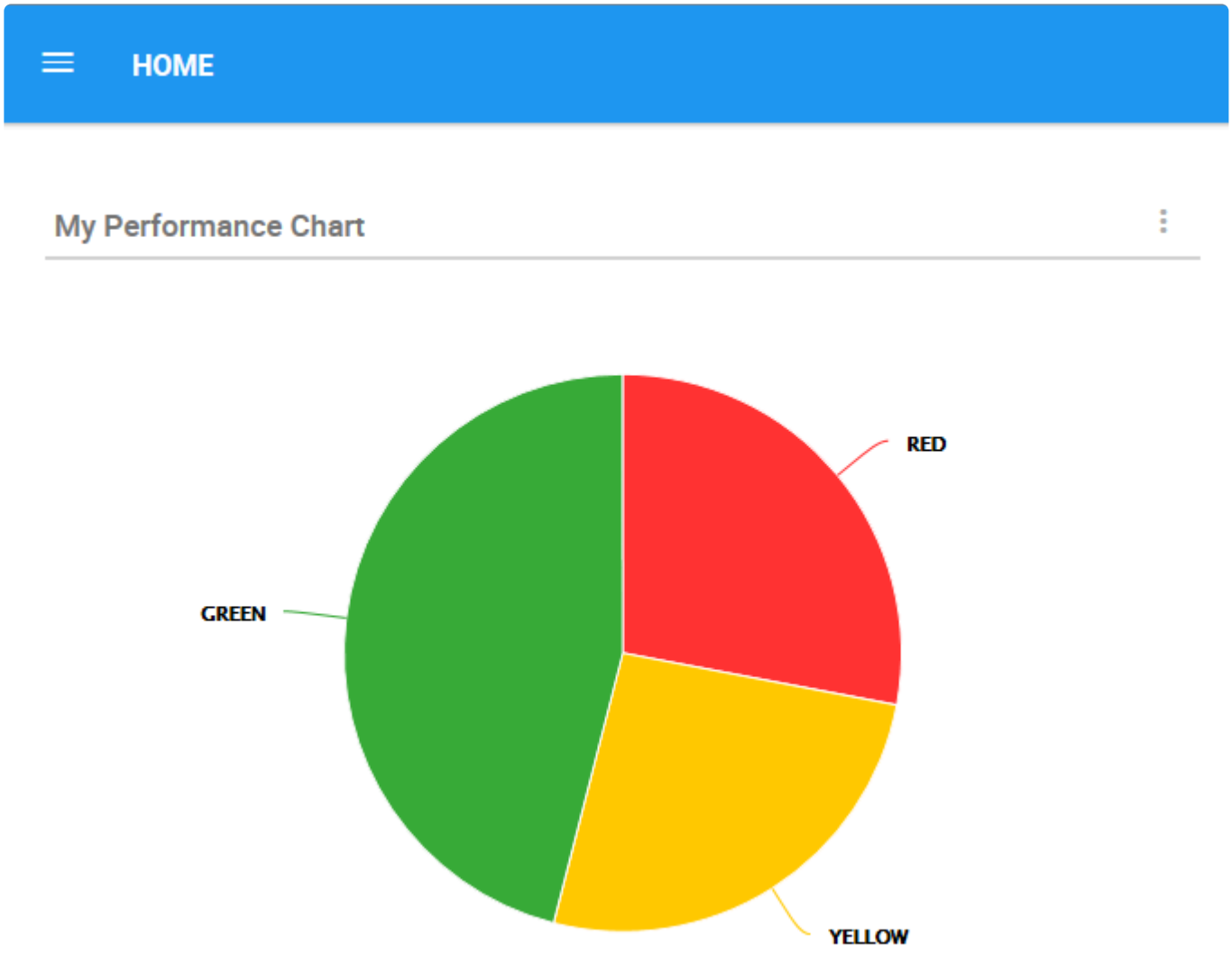
The “My Performance Chart” Widget allows users to feature the performance indicators assigned to their role with a level of responsibility in a pie-chart. Each portion counts of all Key Performance Indicators (KPIs), Key Control Indicators (KCIs) and Key Risk Indicators (KRIs) where the user’s role has a level of responsibility assigned to the performance measure.

The pie-chart is divided by color in three portions. The Pie portion in the color Green represents the indicators that their performance is above expectations, the Pie portion in the color Yellow represents the indicators that their performance is acceptable, and the Pie portion in the color Red represents the indicators that their performance is below expectations.

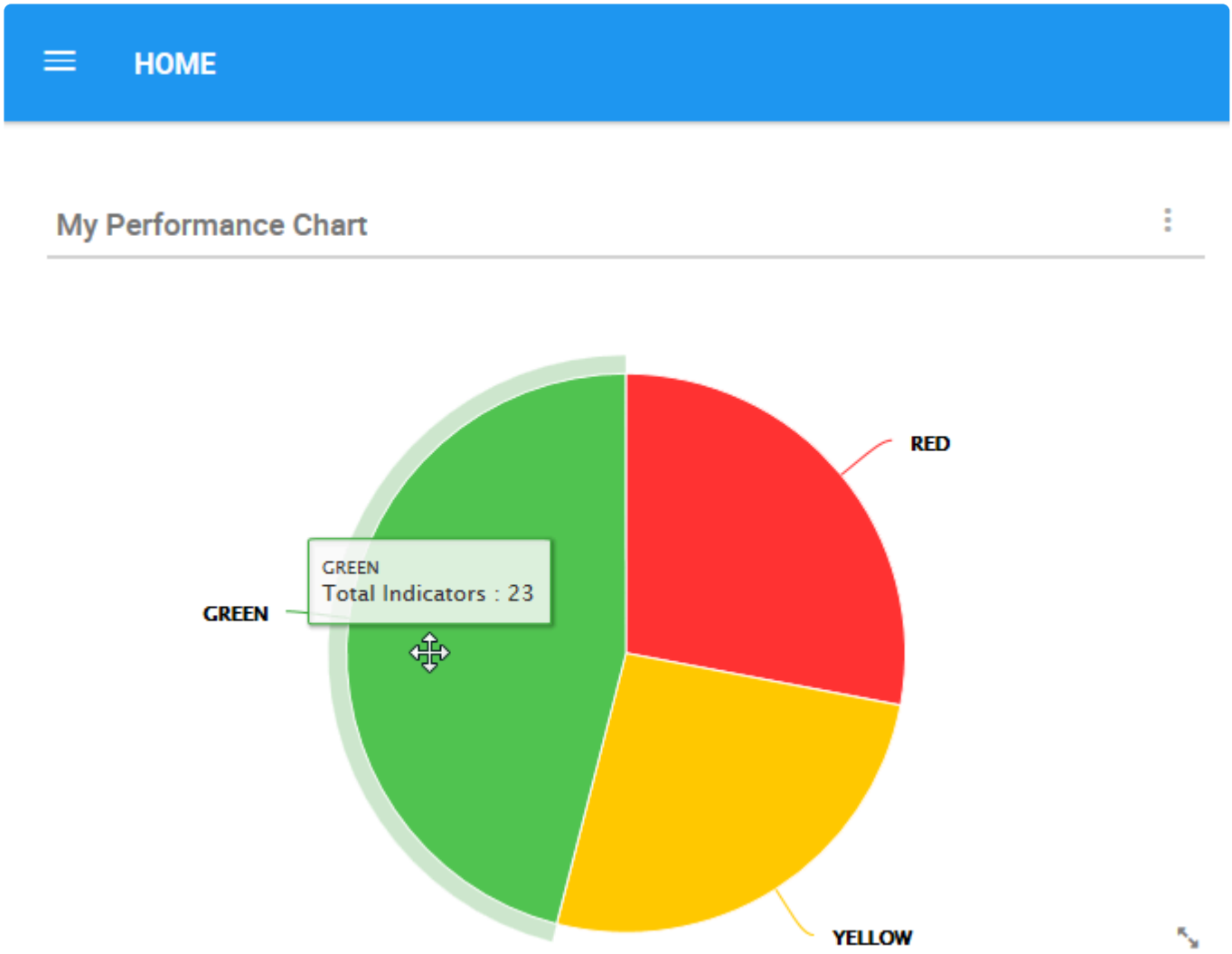
This Widget allows users to *visually* monitor and view the performance of the indicators assigned to their role on their Home Page. To read more about the Performance Module, click here.

My Performance Chart Widget Navigation

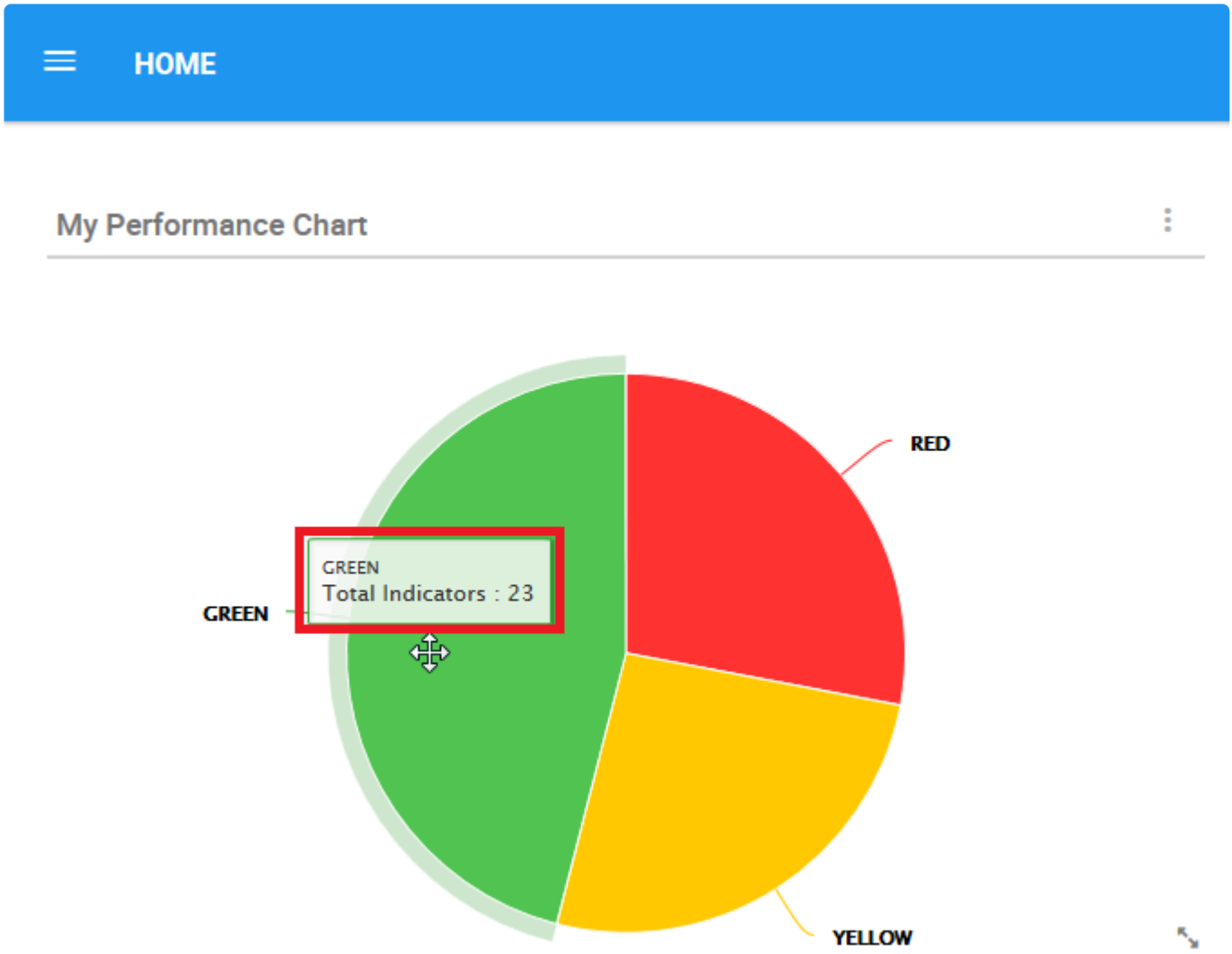
1. Navigate to the Home Page and add a “My Performance Chart” Widget using the Dashboard Manager



2. To view the total number of indicators for each portion, the user needs to hover with his mouse over the portion on the pie-chart to see the numerical value. For this example, hover over the Green portion to see the number of indicators performing above expectations.



3. The numerical value of the total indicators performing above expectations will appear in a box.



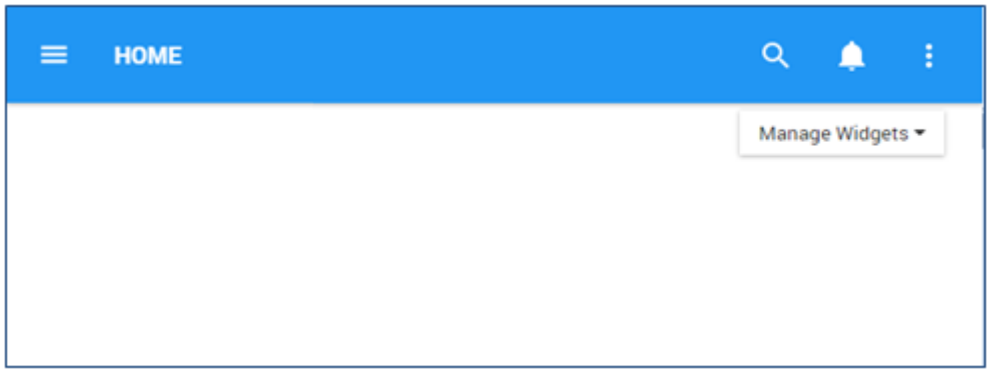
To customize the My Performance Chart Widget, click here

4.2.1.1.7.1 Customize My Performance Chart Widgets

The My Performance Chart Widget allows users to feature the performance indicators assigned to their role with a level of responsibility in a pie-chart. Customizing “My Performance Chart” will allow users to prioritize key information related to their job responsibilities and performance.

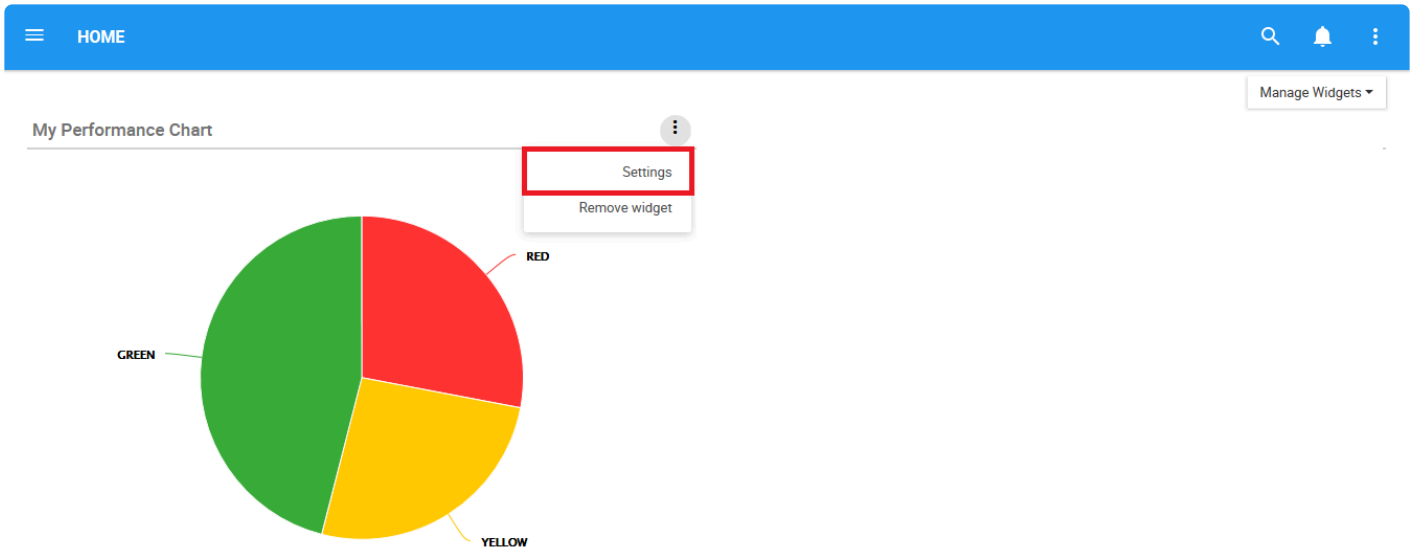
Please follow the instructions below to customize the “My Performance Chart” Widget.

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

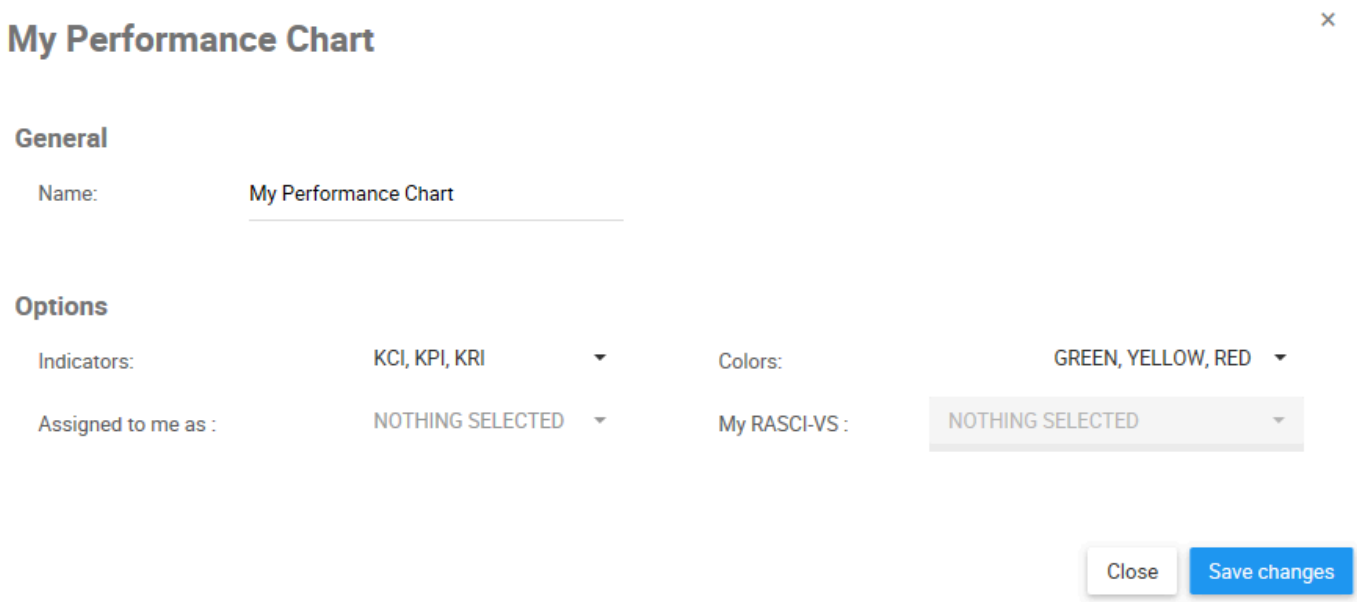


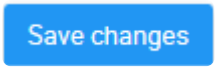
2. To add widgets to your home page, navigate to the the Manage Widgets button and select the widget you want to add from the Dashboard Manager

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

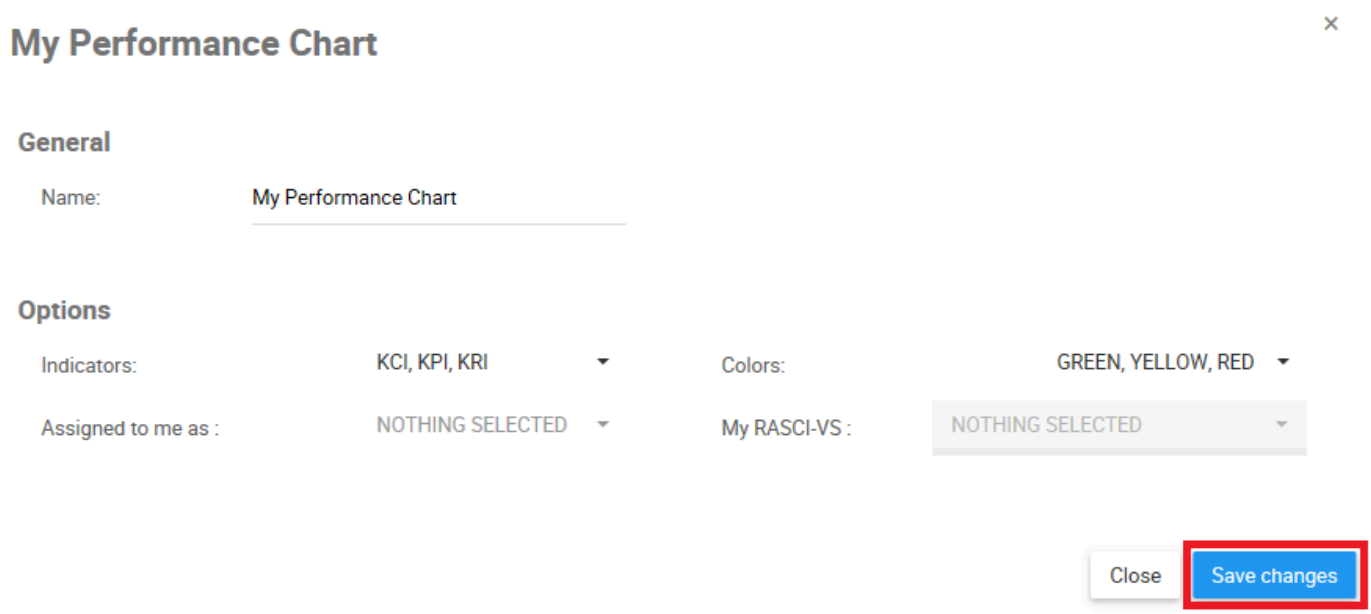


4. Click on the “Settings” button and a pop-up window will be generated as follows



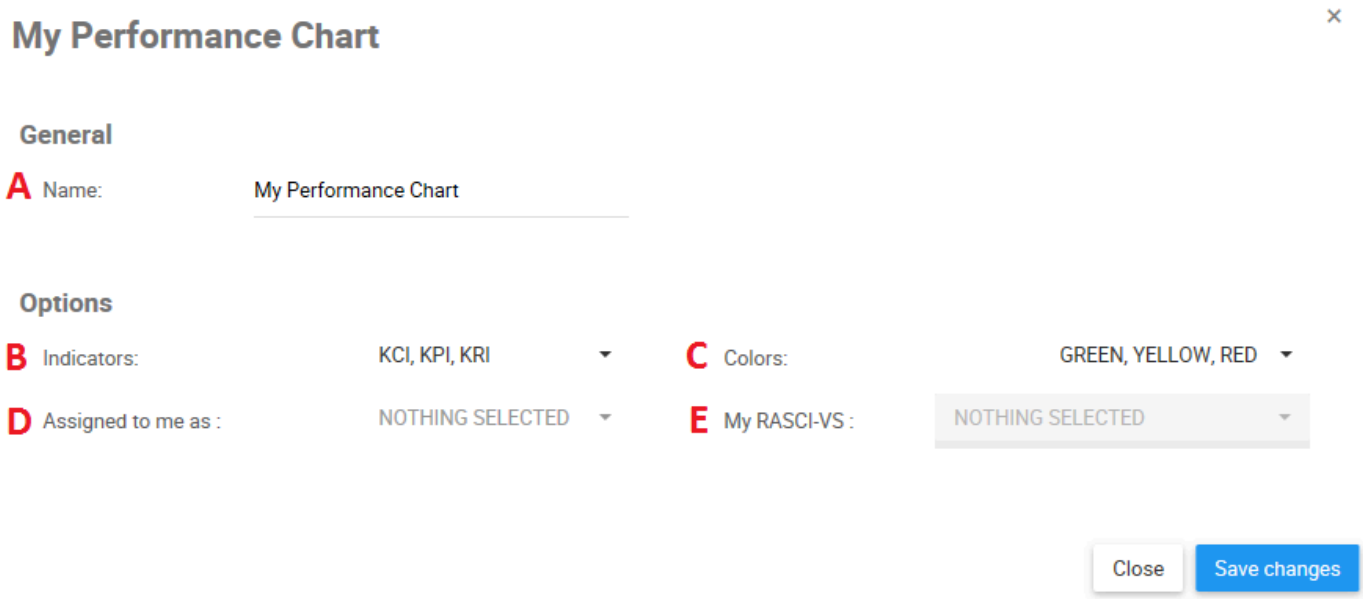
5. After customizing the settings, click on the 

button to save the changes made.



My Performance Chart Widget Settings Parameters

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

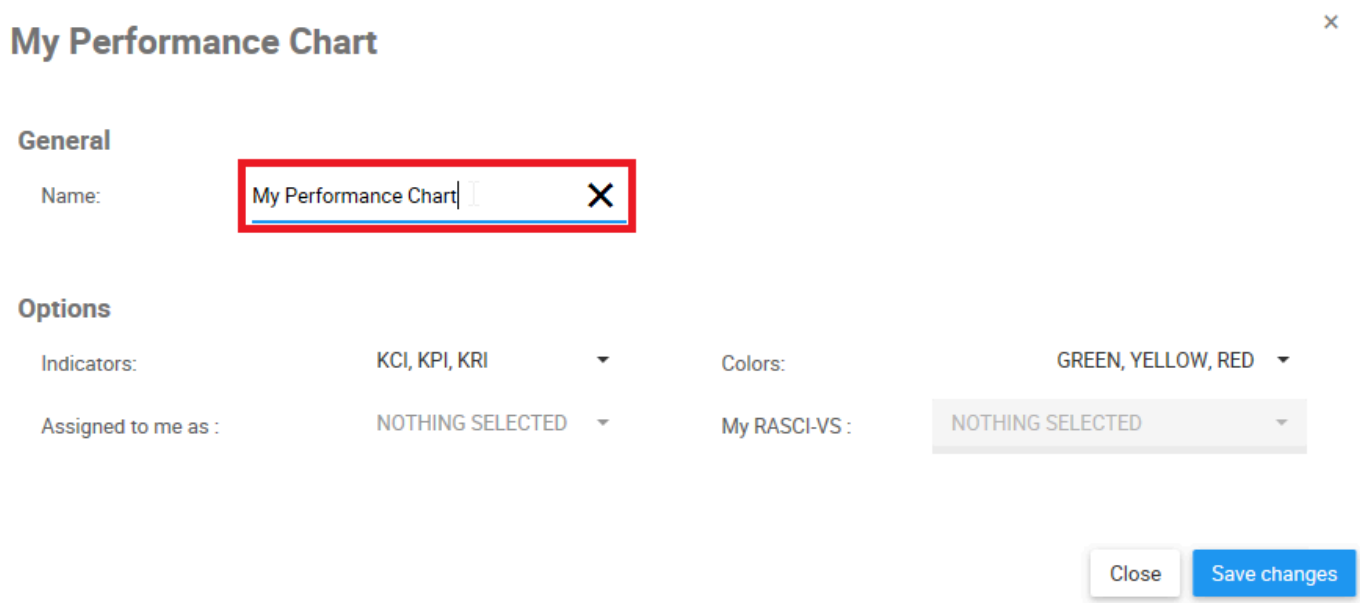


Item	Setting	Purpose
A	Name	Allows user to customize the title of the Widget
B	Indicators	Allows users to multi-select object type to be featured
C	Colors	Allows users to filter through their assigned roles (if numerous)

D	Assigned to me as	Allow users to filter through their assigned Roles and Resources.
E	My RASCI-VS	Allow users to organize their Roles and Resources based on their level of involvement.

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

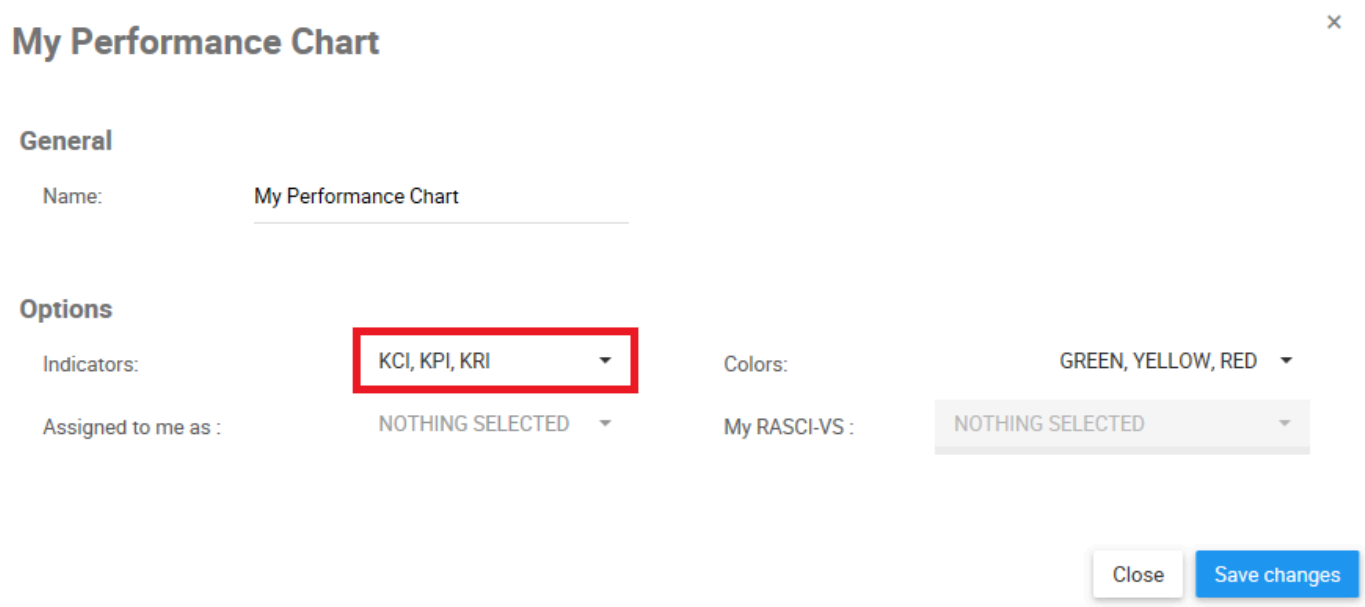
i. Navigate cursor over existing name box



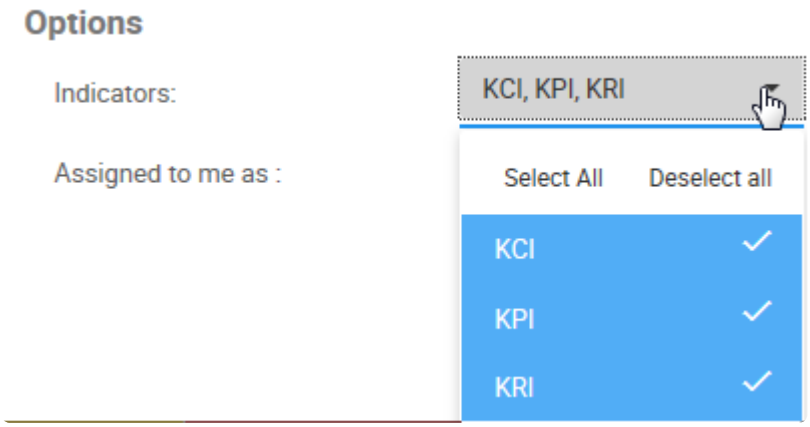
ii. Edit name by selecting name box and typing in desired name

B. **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



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

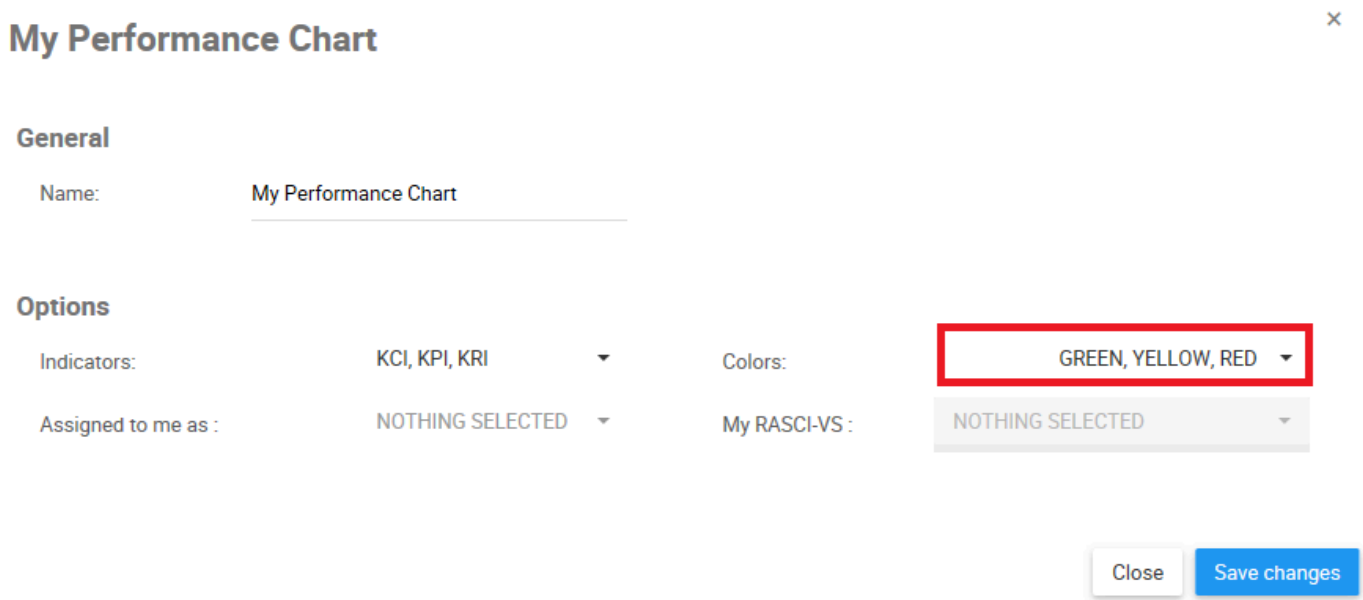


iii. Select/Deselect desired object(s) to be featured in Widget window by navigating cursor and clicking on respective objects.

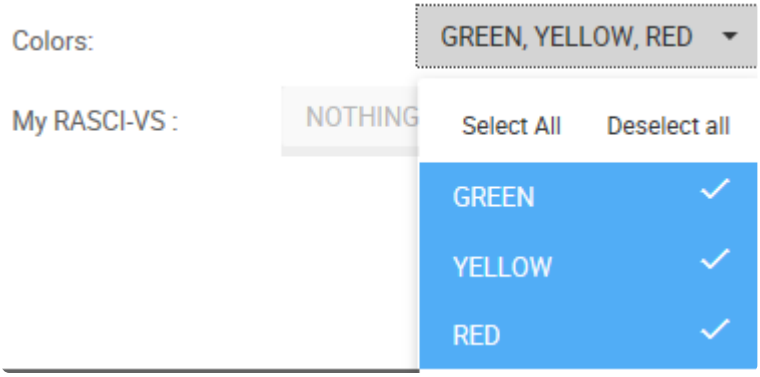
> You may select **MULTIPLE** Indicators to be featured in individual Widgets.

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

i. Navigate cursor over the Colors task bar



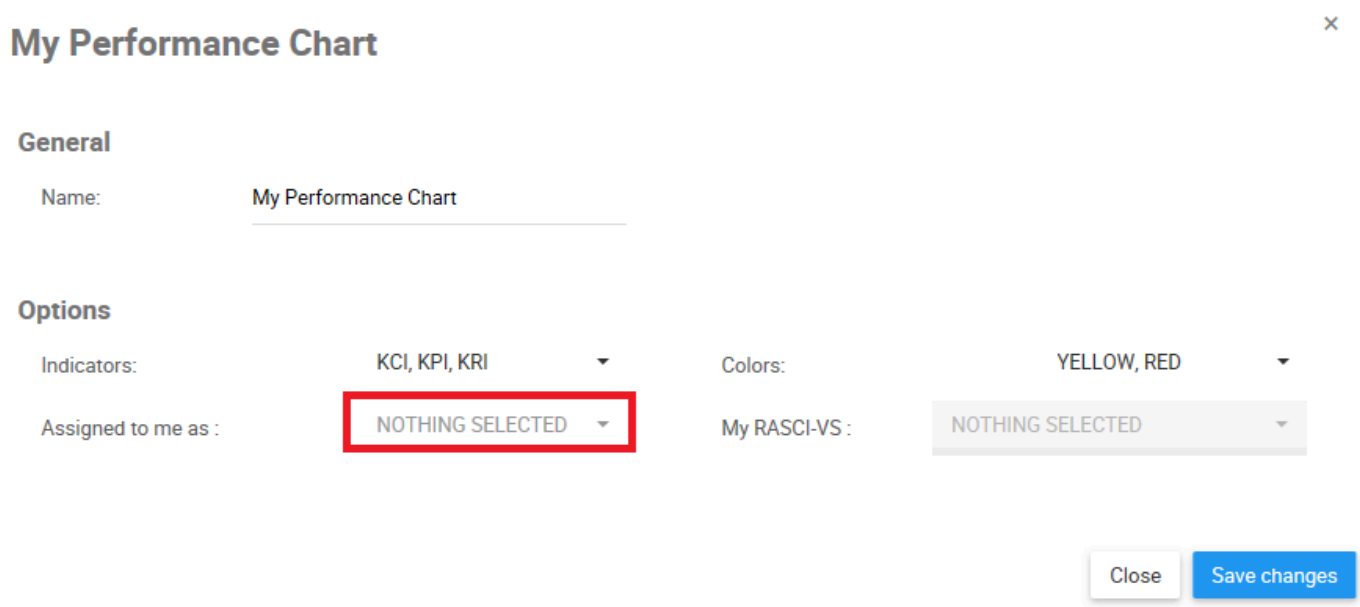
ii. Click on the task bar, which will generate a drop-down menu



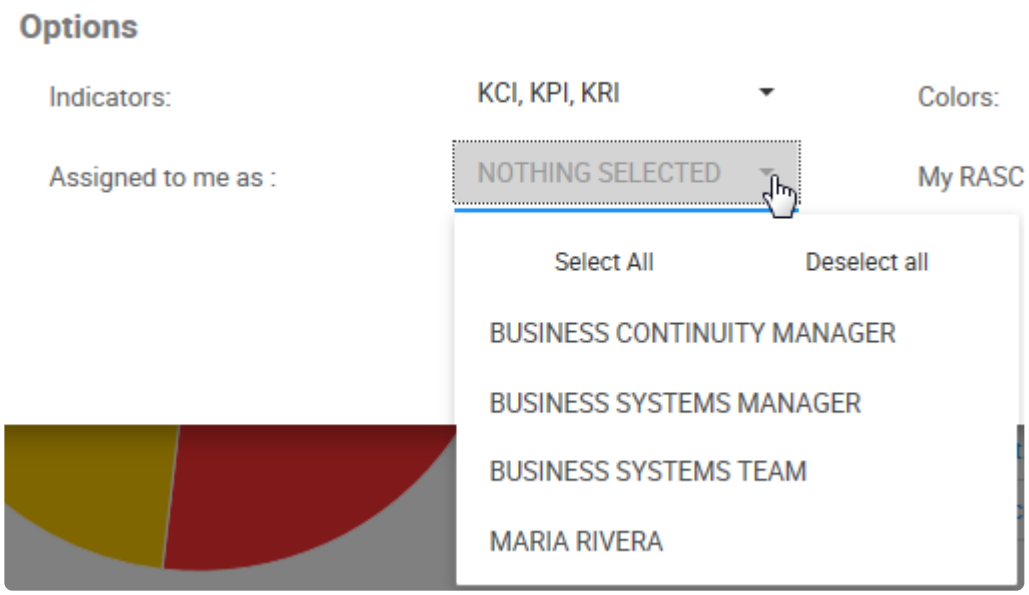
iii. Select/Deselect desired object(s) to be featured in Widget window by navigating cursor and clicking on respective objects.

D. **Assigned to me as:** Roles will be assigned to users by EPC Modelers. Individuals can be assigned one or multiple roles, depending on their versatility within an organization. Roles 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.

i. Navigate cursor over the Assigned to me as task bar



ii. Click on the task bar, which will generate a drop-down menu with the roles that have been assigned to users



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

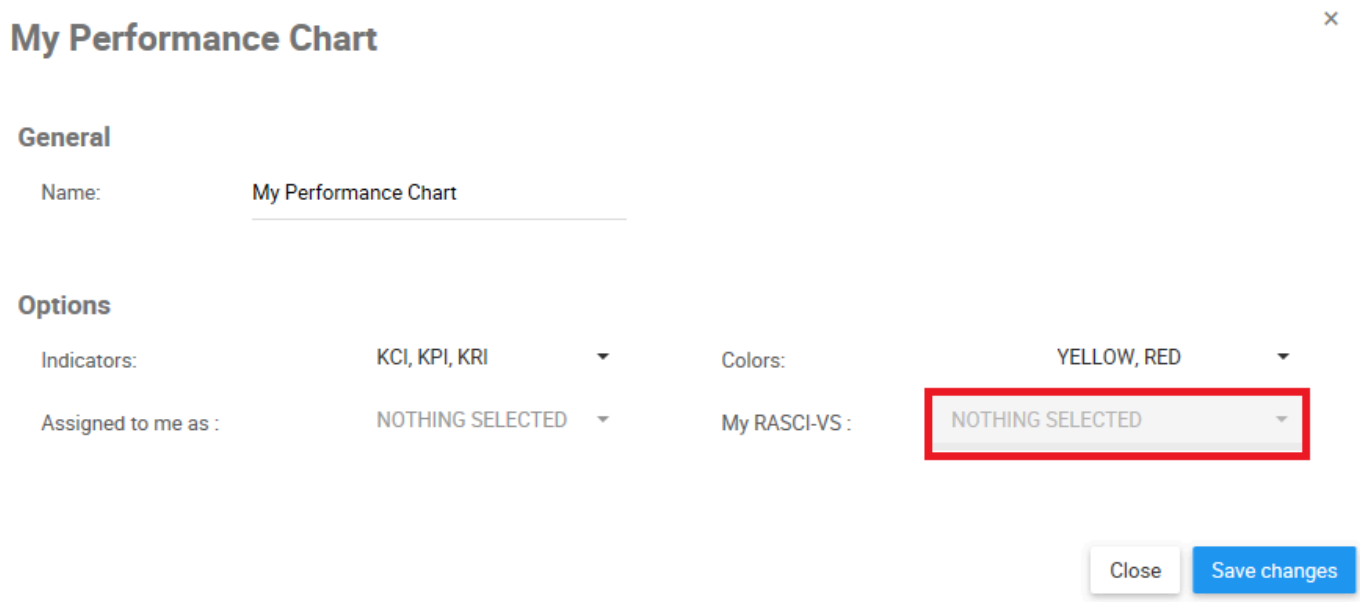
> Users can be assigned multiple roles within an organization. This is a common case in dynamic organizations with diversely-skilled workers.

E. **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

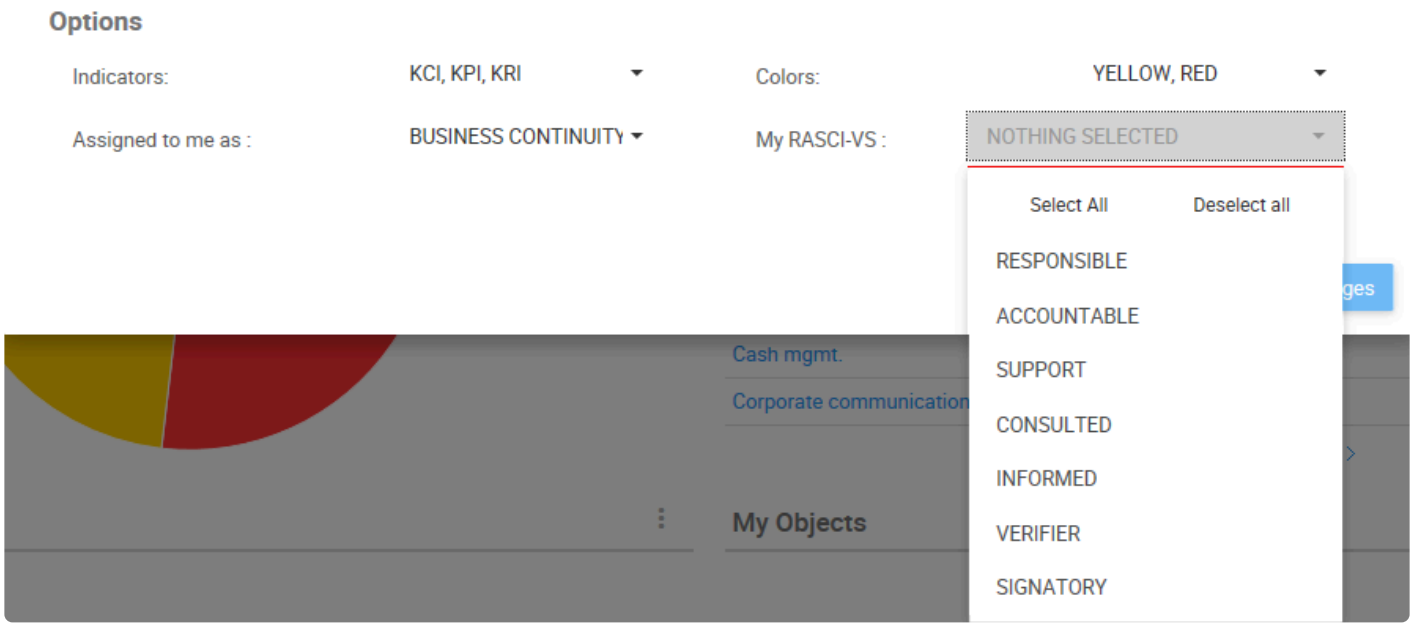
Please see **My RASCI-VS** section above for detailed explanation of the RASCI-VS Matrix in Section 3.4.

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



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

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



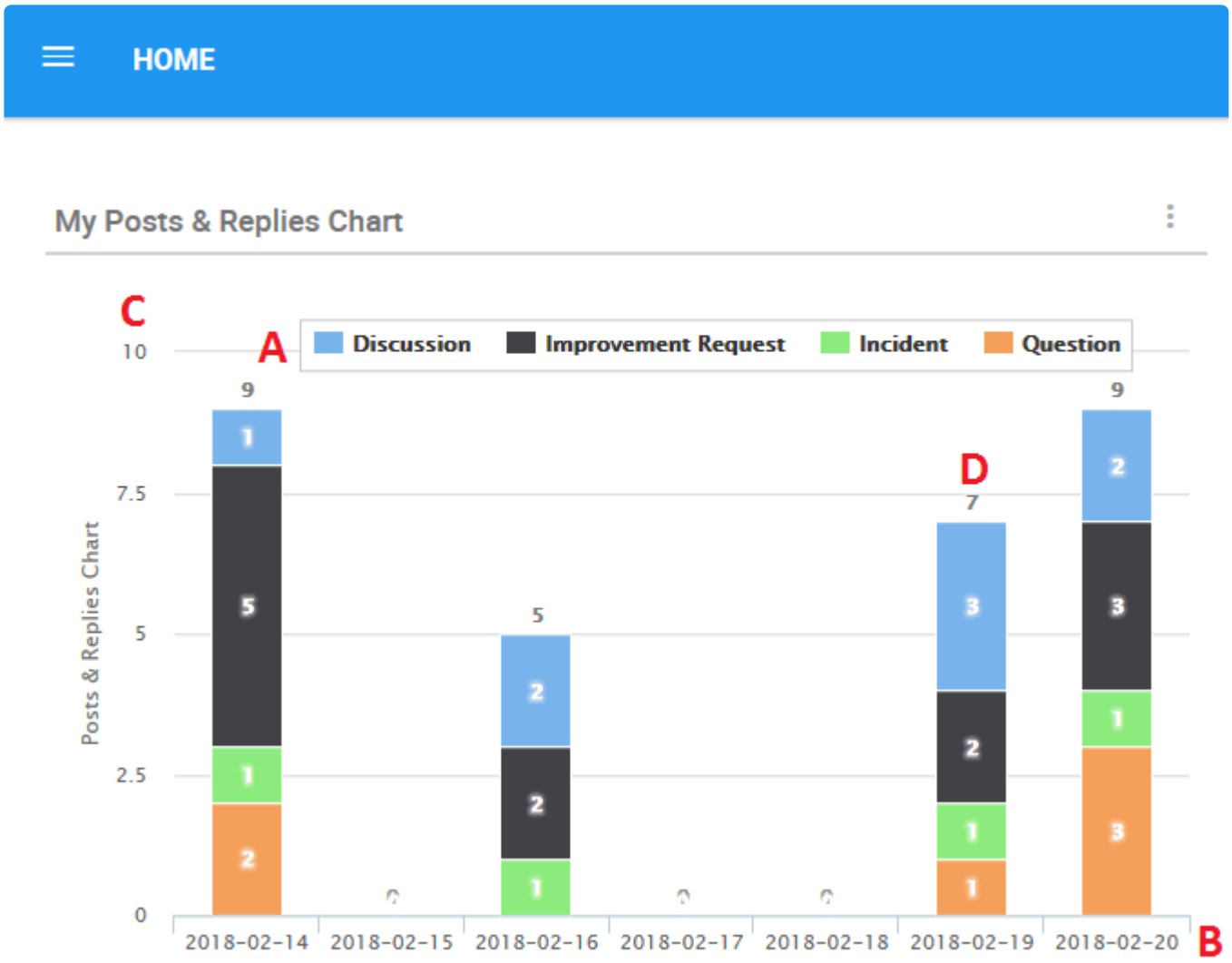
iii. Select the desired RASCI-VS Metrics. Note that you can select multiple RASCI-VS metrics.

4.2.1.1.8 My Posts & Replies Chart Widget

The “My Post & Replies Chart” Widget allows users to view a chart with the number of posts and replies created over the past seven days on processes and flow objects where the user has a level of responsibility (RASCI-VS) or/and is subscribed to.

Each of the seven columns displayed on the chart represents a day of the past seven days. Each column displays the number of posts and replies created for that specific day. The columns are divided in four categories:

1. Discussion Posts & Replies in blue
2. Improvement Request Posts & Replies in black
3. Incidents Posts & Replies in green
4. Questions Posts & Replies in orange



A. **Legend:** A legend is provided on top of the chart displaying each category for Posts & Replies with its

respective color.

B. **X-Axis:** The values on the X-axis of the chart represent the past seven days.

C. **Y-Axis:** The values on the Y-axis of the chart represent the total numerical value of new posts & replies for the day.

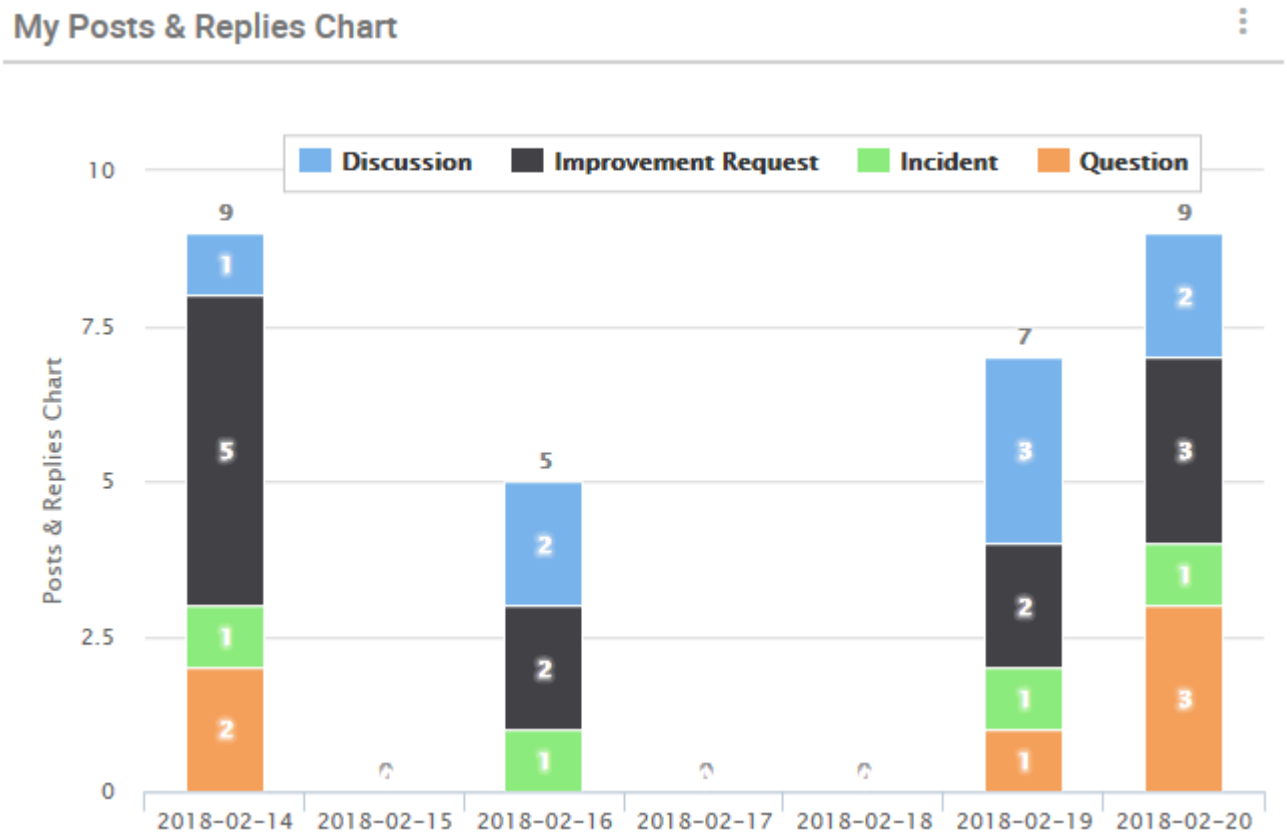
D. **Column:** The column displays the number of new posts and replies for a specific day. The column is divided in 4 different sections. Each section has its own color and the color determines if its a discussion, an improvement request, an incident or a question.

> The column can have **up-to 4 sections**. If, for example, only discussions and questions posts & replies were created on a specific day, the column will only have 2 sections instead of 4.

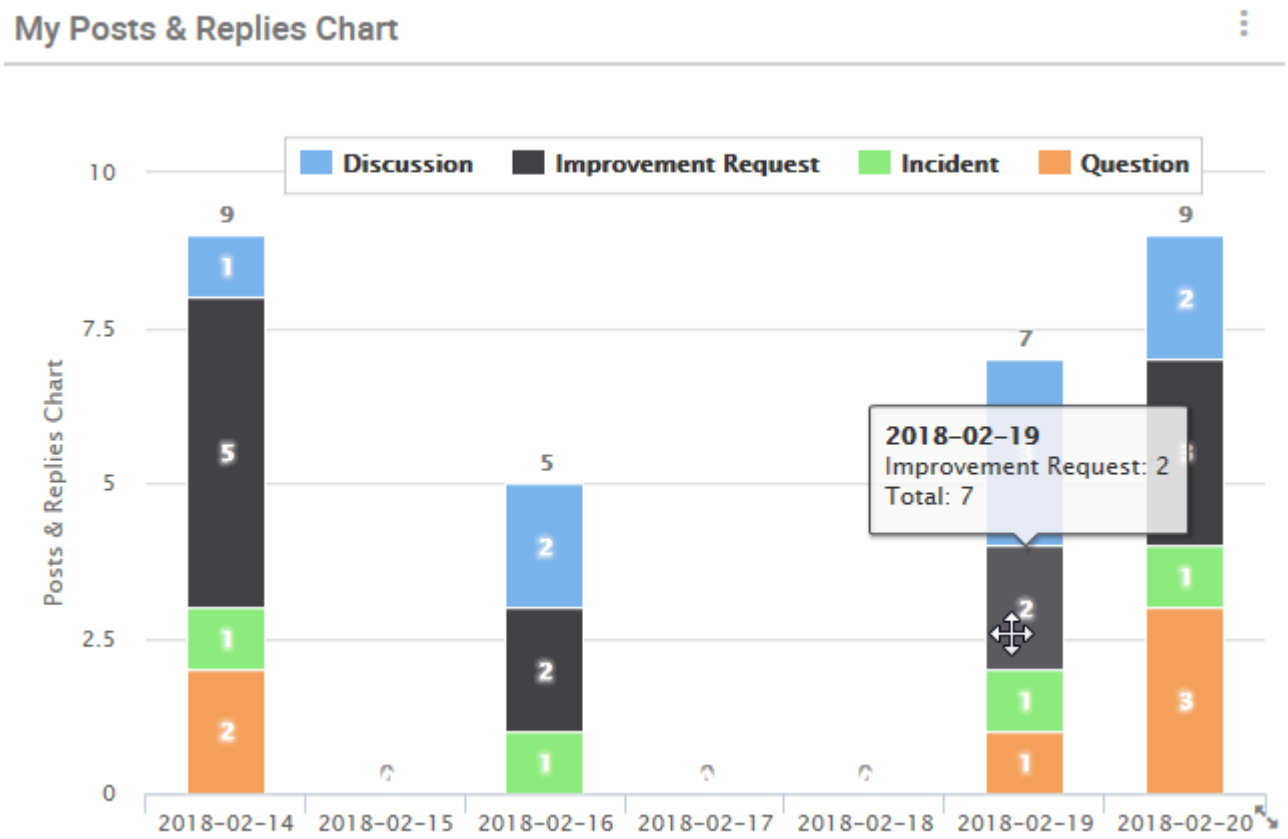
> If no posts & replies were created on a specific day, the chart won't display a column for that day.

My Posts & Replies Widget Navigation

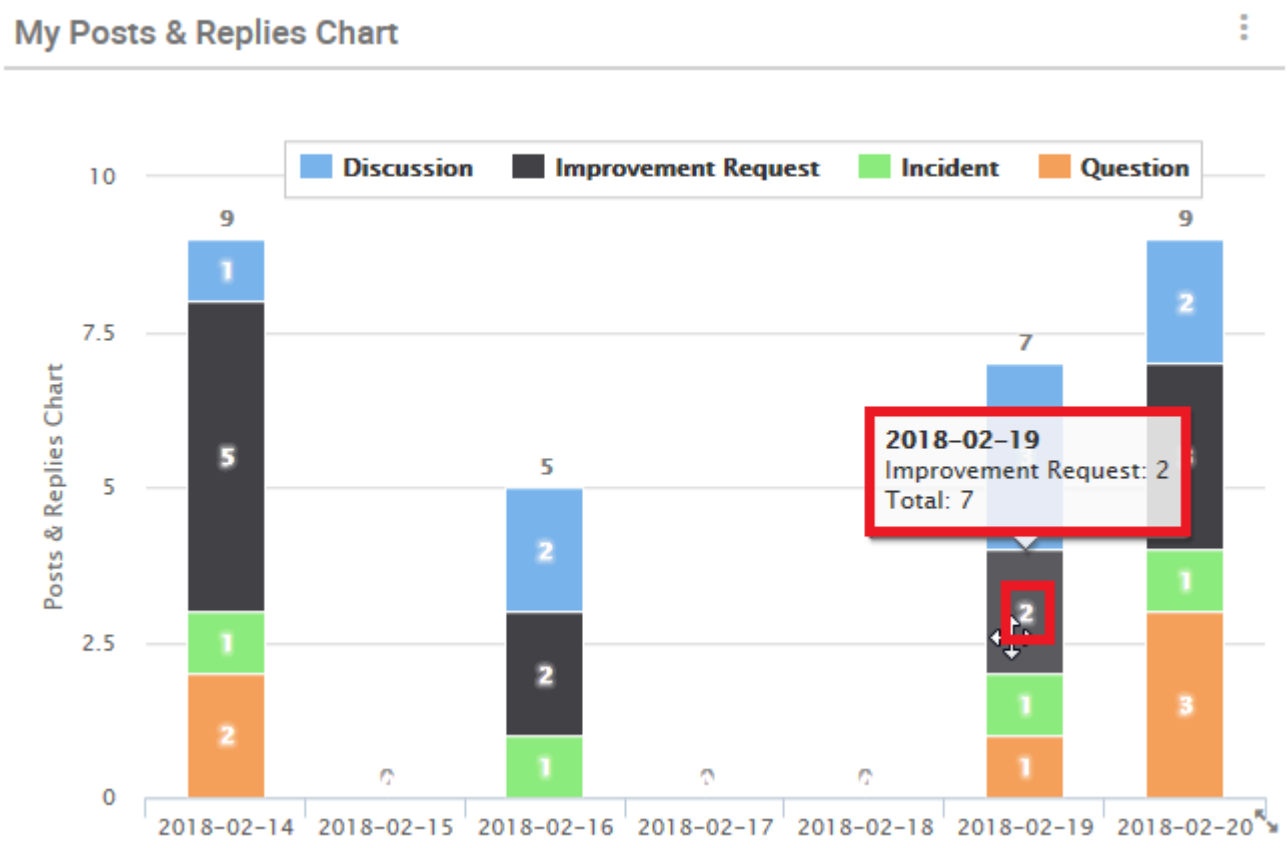
1. Navigate to the Home Page and add a "My Posts & Replies" Widget using the Dashboard Manager



2. To view more details about each section on a column and about the posts & replies created on a specific date, the user needs to hover with his mouse over the columns, For this example, hover over the black section of Improvement Requests created on February 19th.



3. The numerical value for the specific section as well as the total value of new posts & replies will appear in a box.



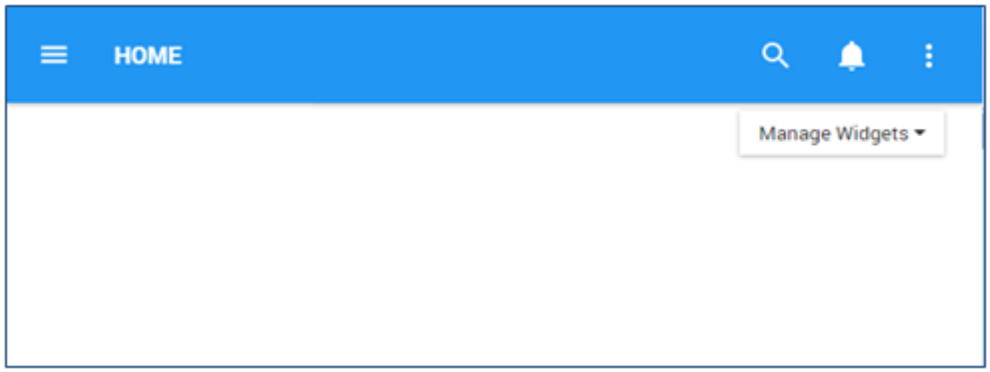
To customize the My Posts & Replies Widget, [click here]

4.2.1.1.8.1 Customize My Posts & Replies Chart Widgets

The My Posts & Replies Widget allows users to feature a chart with the number of posts and replies created over the past seven days on processes and flow objects where the user has a level of responsibility (RASCI-VS) or/and is subscribed to.

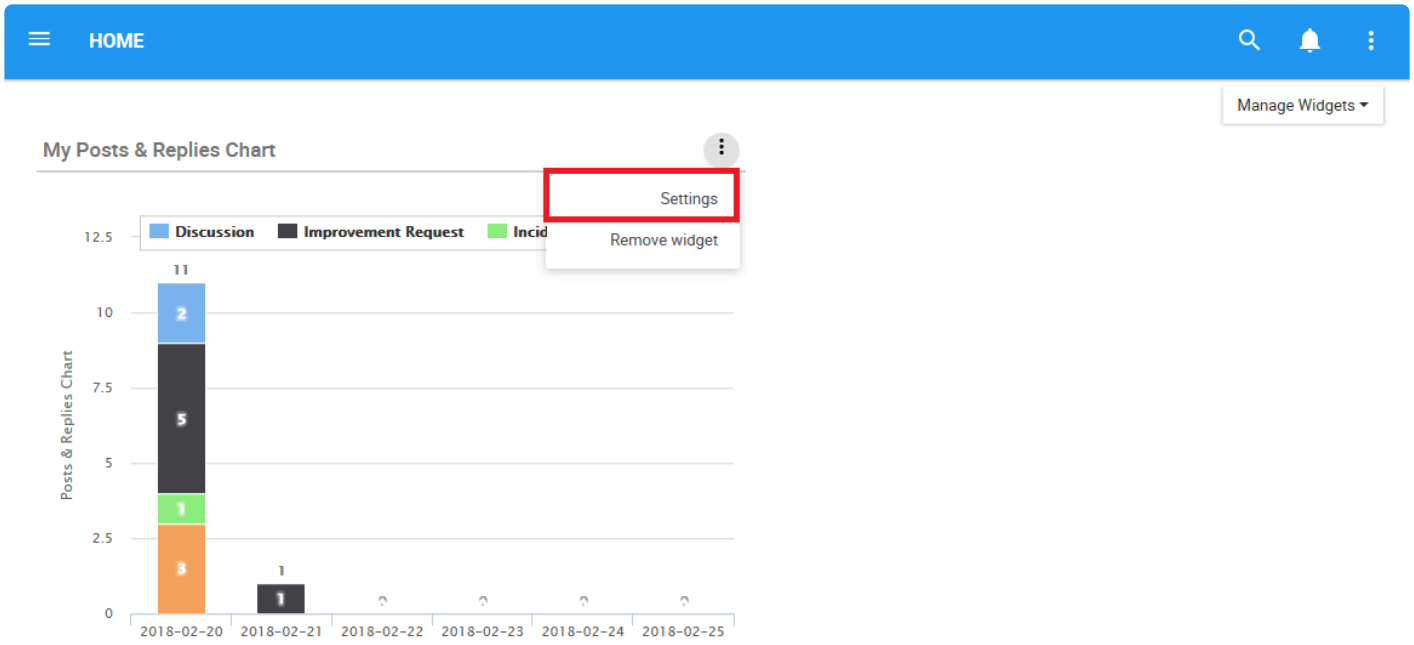
Please follow the instructions below to customize the “My Posts & Replies” Widget.

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

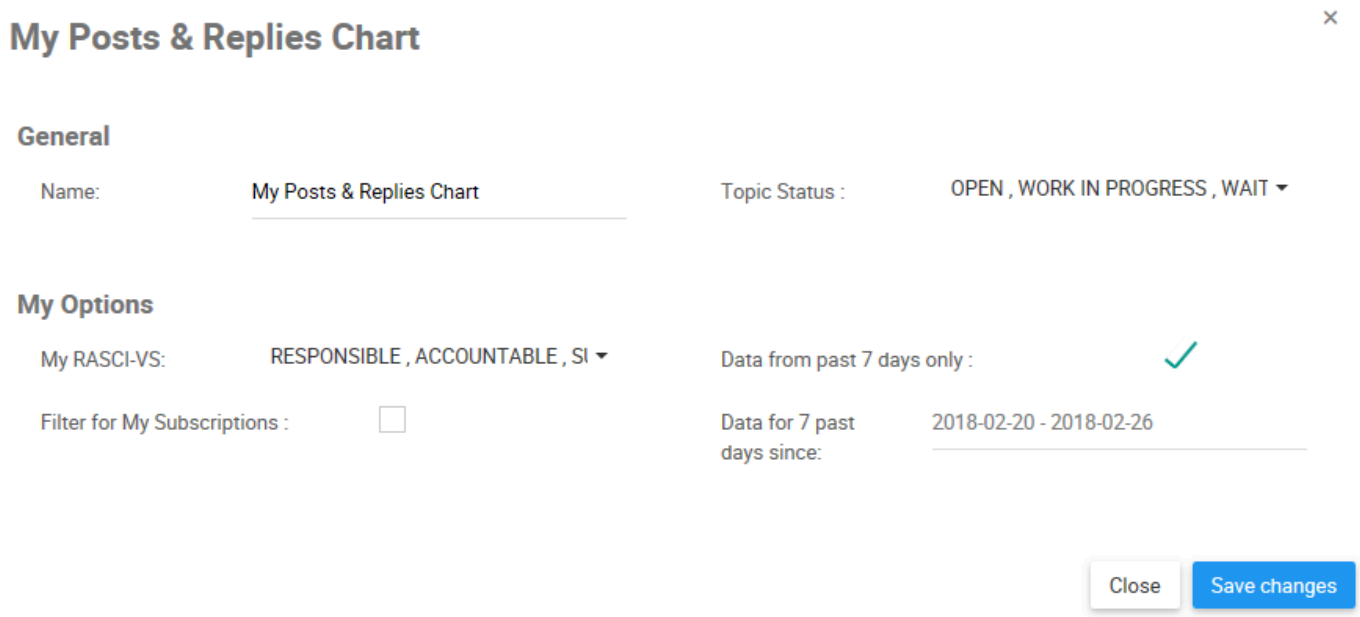


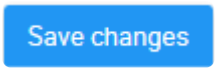
2. To add widgets to your home page, navigate to the the Manage Widgets button and select the widget you want to add from the Dashboard Manager

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

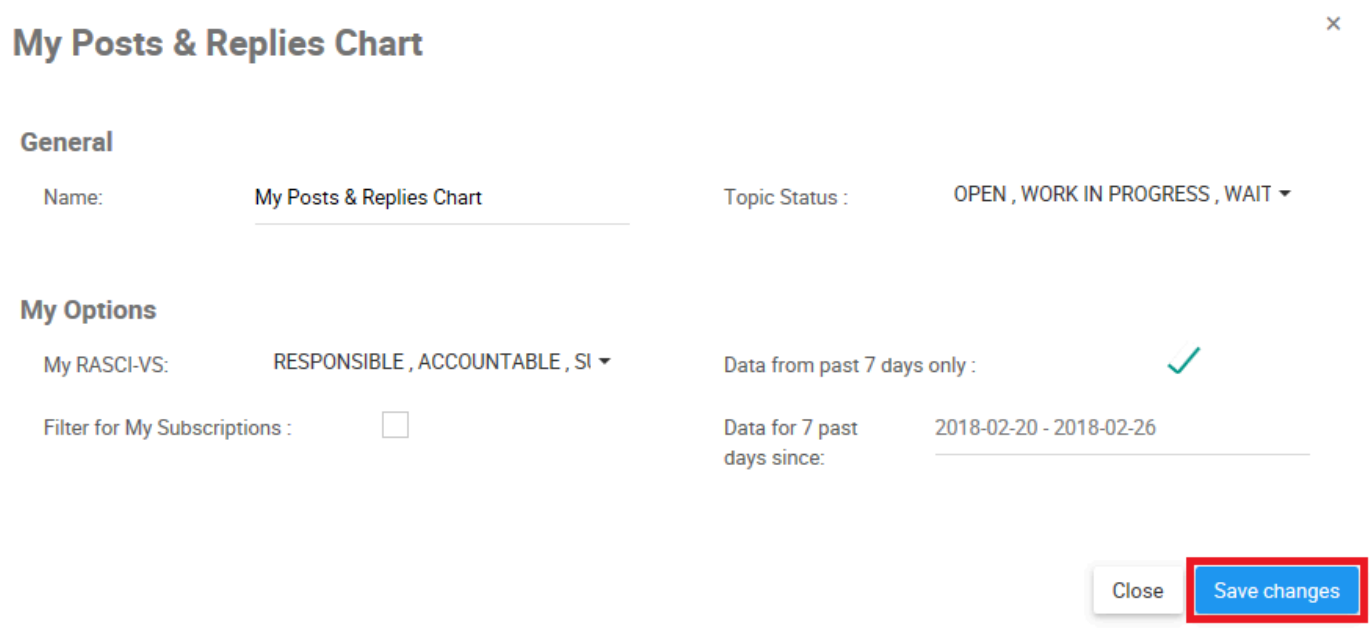


4. Click on the “Settings” button and a pop-up window will be generated as follows



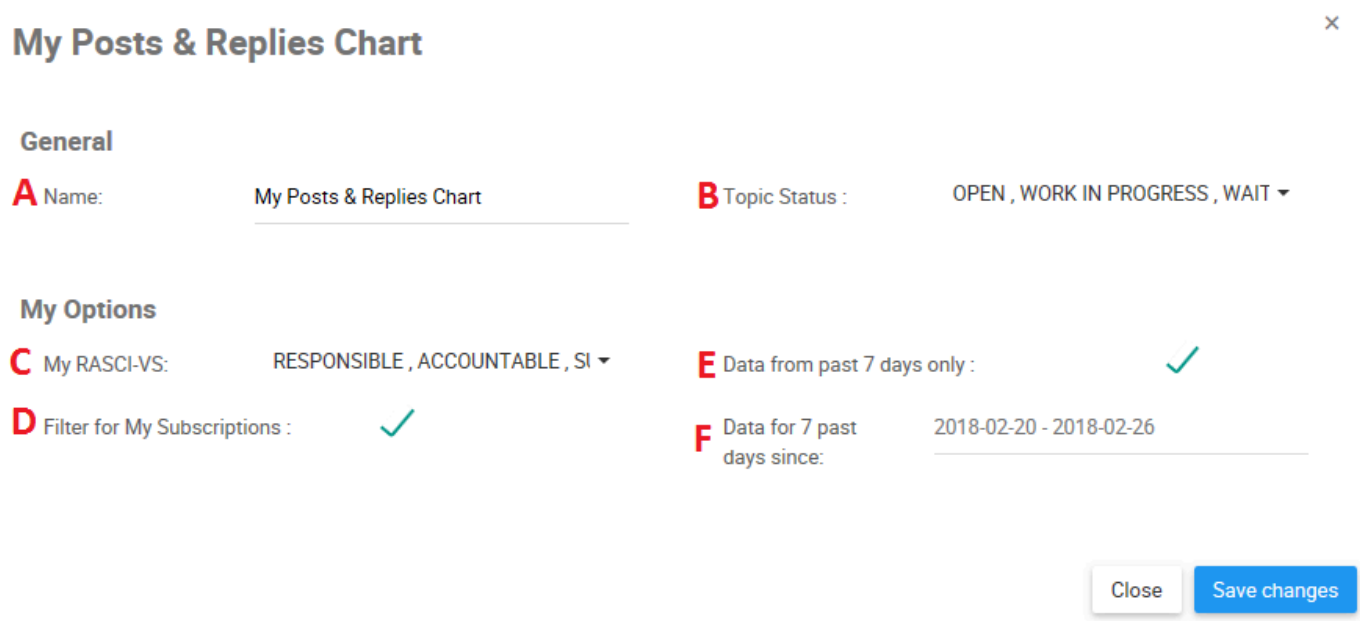
5. After customizing the settings, click on the 

button to save the changes made.



"My Posts & Replies Chart" Widget Settings Parameters

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

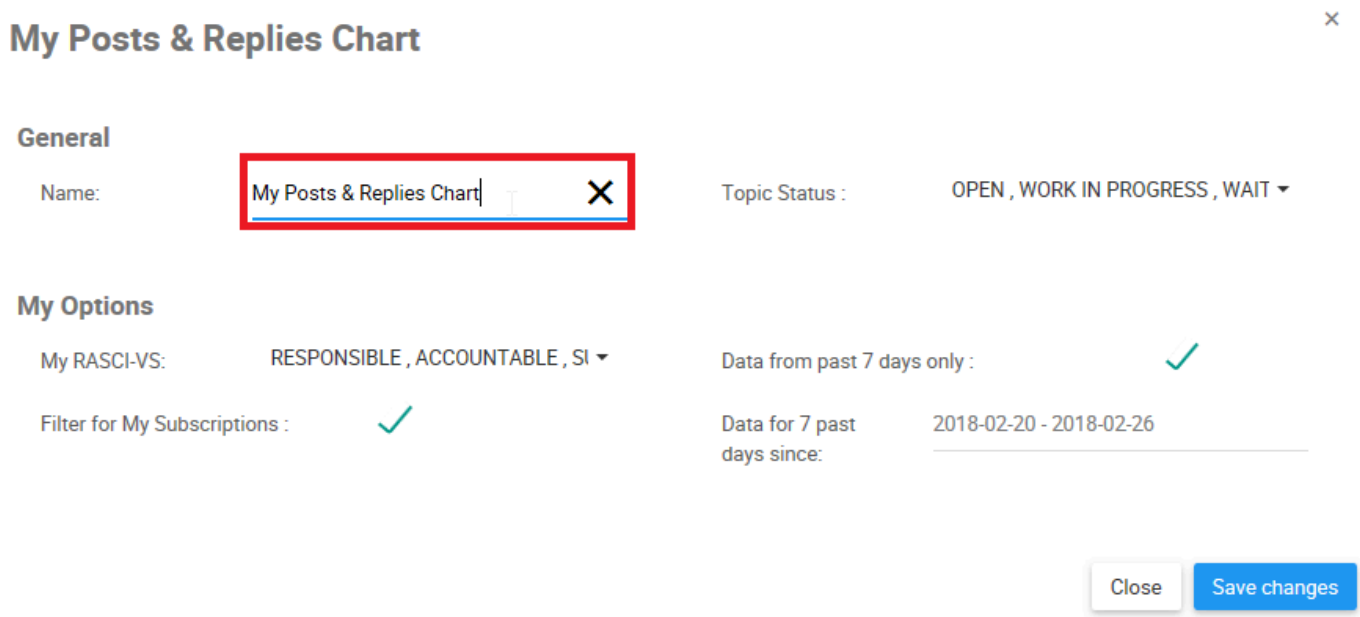


Item	Setting	Purpose
A	Name	Allows user to customize the title of the Widget
B	Topic Status	The current status of the new posts and replies created over the past 7 days

C	My RASCI-VS	Allow users to organize their Roles and Resources based on their level of involvement
D	Filter for My Subscriptions	Allow users to sort specific objects by subscribed items
E	Data from past 7 days only	Allow users to show the data from the past 7 days
F	Data for 7 past days since	Allow users to select a 7-day range from the calendar to be displayed on the chart

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

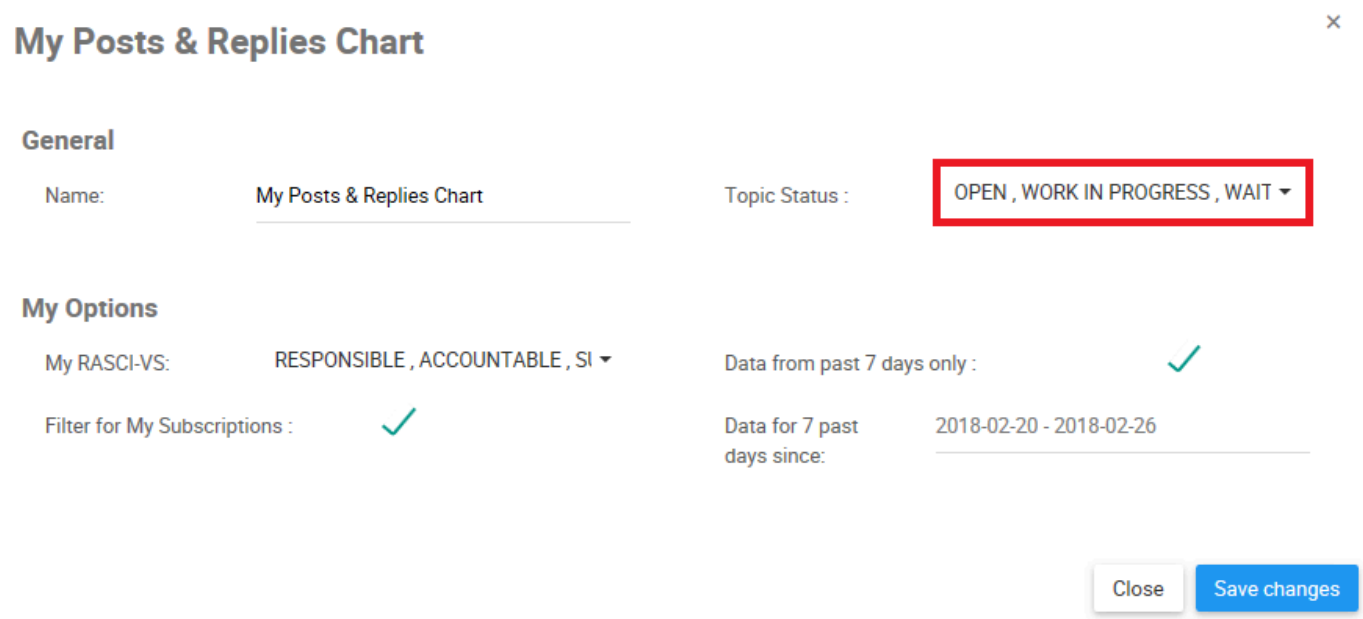
i. Navigate cursor over existing name box



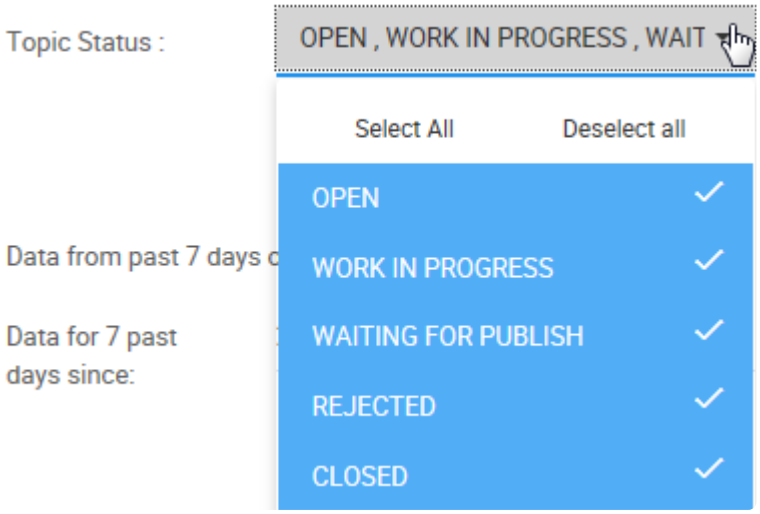
ii. Edit name by selecting name box and typing in desired name

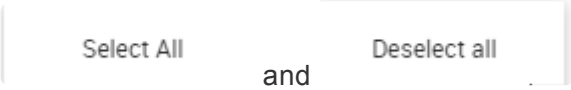
B. **Topic Status:** The Topic Status filters the widget by the status of the new posts & replies created over the past 7 days. The different topic status are: Open, Work In Process, Waiting for Publish, Rejected and Closed.

i. Navigate cursor over the topic status task bar



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



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

and buttons that can be used for mass selection.

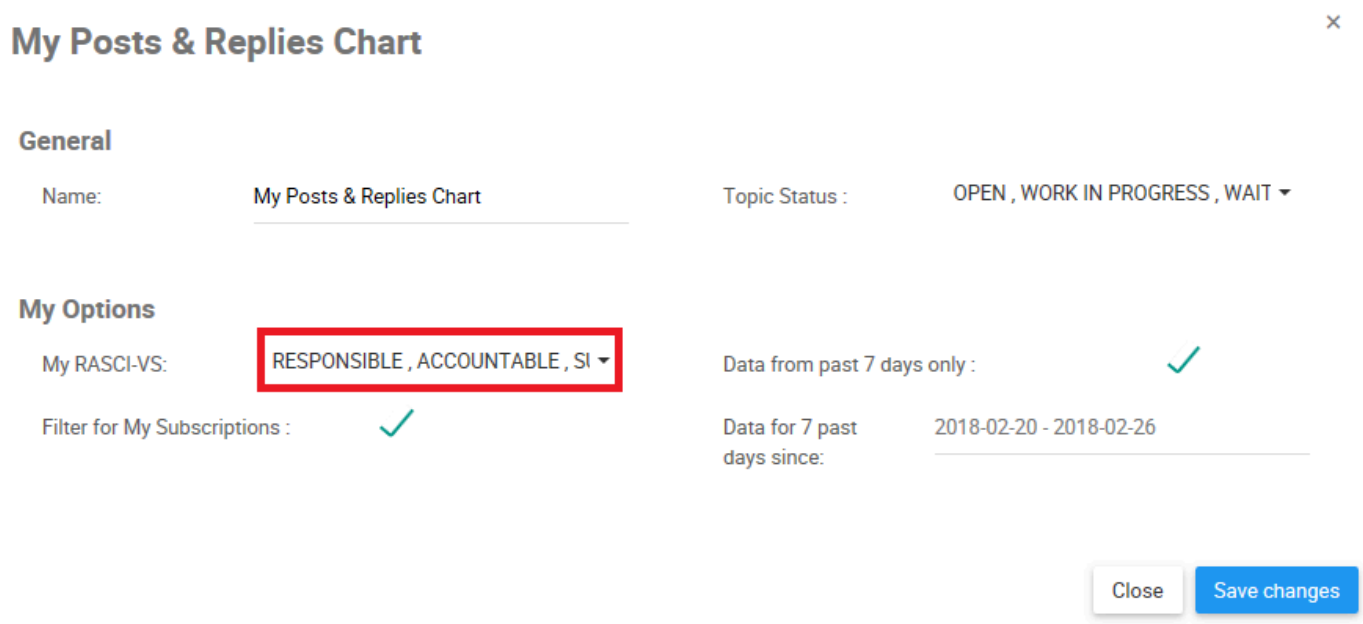
> You may select **MULTIPLE** Topic Status to be featured in individual Widgets.

C. **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.

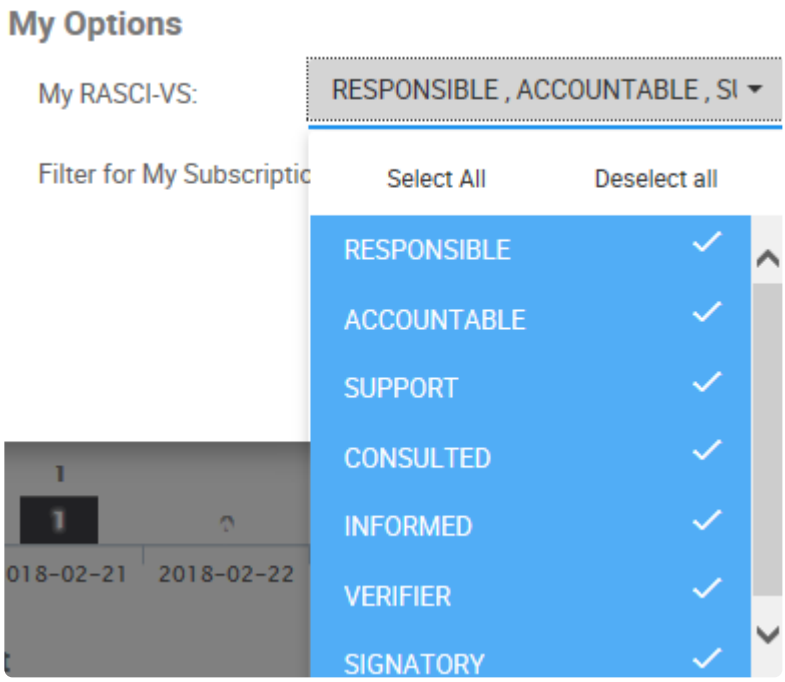
R – Responsible
A – Accountable
S – Support
C – Consulted
I – Informed
V – Verified
S – Signatory

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

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



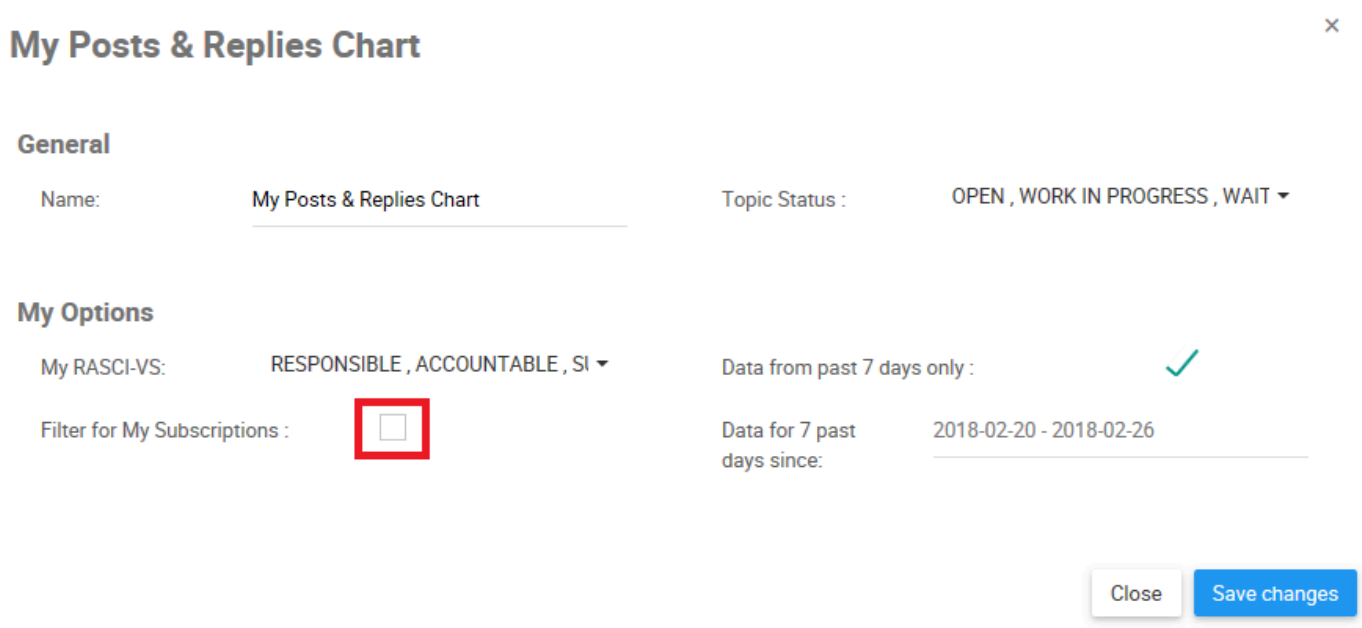
ii. Click on the RASCI-VS filter and a drop-down menu will be generated



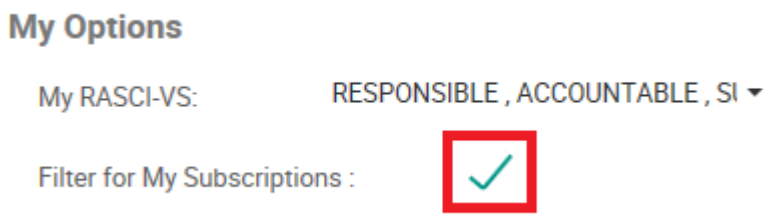
iii. Select the desired RASCI-VS Metrics. Note that you can select multiple RASCI-VS metrics.

D. **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 posts & replies that the user is subscribed to.

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

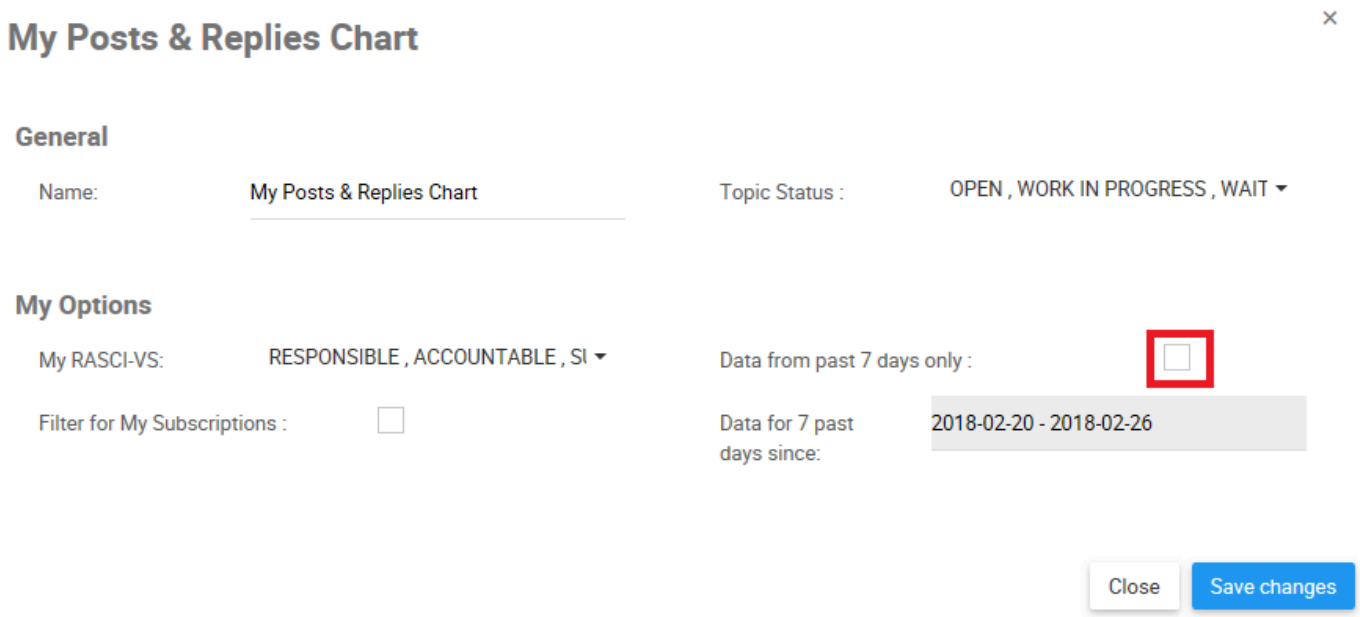


ii. Select option by clicking on box. This will generate a green check mark to confirm that option has been selected

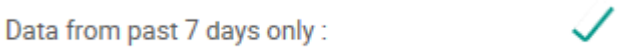


E. **Data from past 7 days only:** Users can select the “Data from past 7 days only” option, and Widget will feature only the specific posts & replies that were created over the past 7 days.

i. To show “Data from past 7 days only,” navigate cursor over tic-box

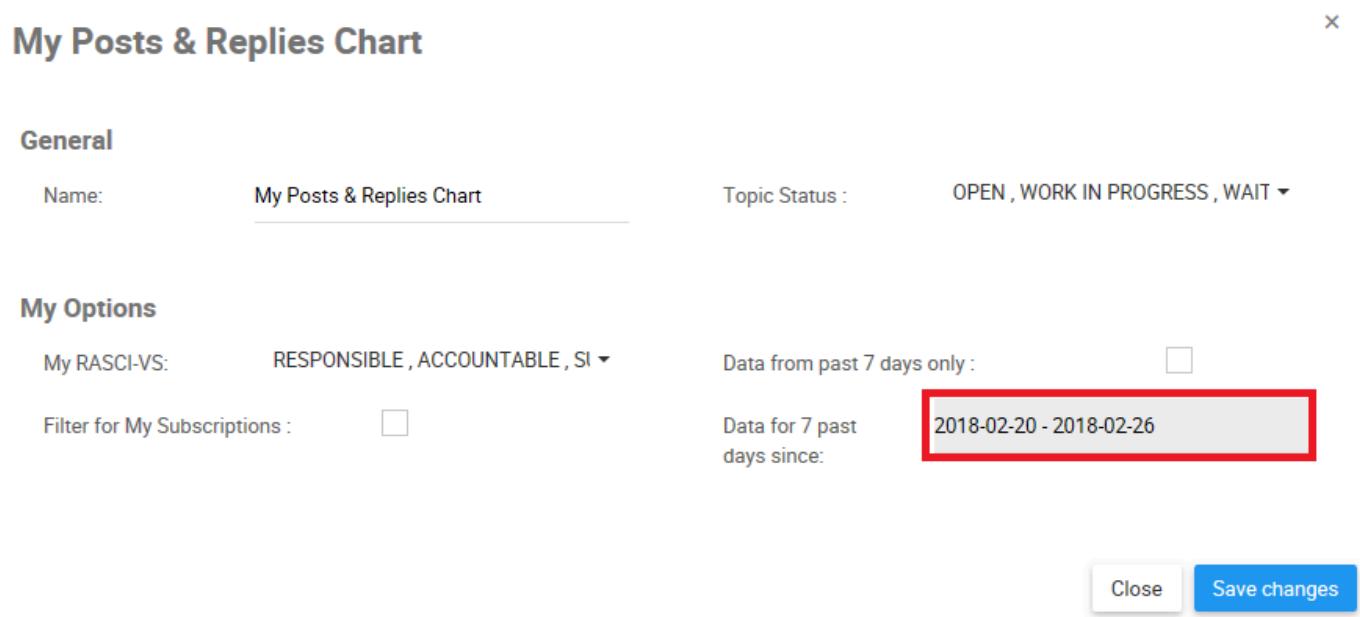


ii. Select option by clicking on box. This will generate a green check mark to confirm that option has been selected



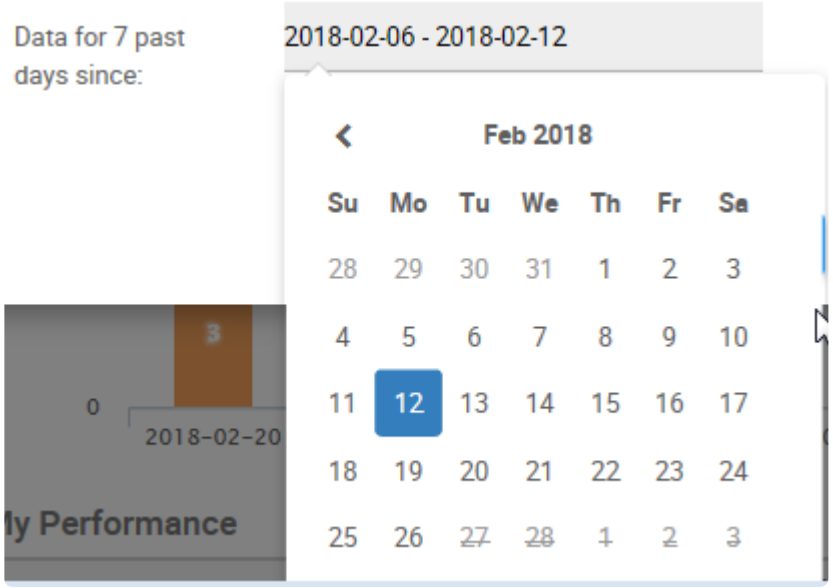
F. **Data for 7 past days since:** If users do not want to see the data from the past 7 days only, they need to first deselect the tic-box “Data from past 7 days only.” They can then select a 7-day range from the calendar to display the new posts and replies created during this range.

i. To show “Data for 7 past days since,” navigate cursor over the dates box



ii. A calendar will appear. Select the date you desire to see new posts and replies on the chart

> The data you will see is from the 7 days before the date you click. Example: you click on February 12, you will see data from February 6 to February 12

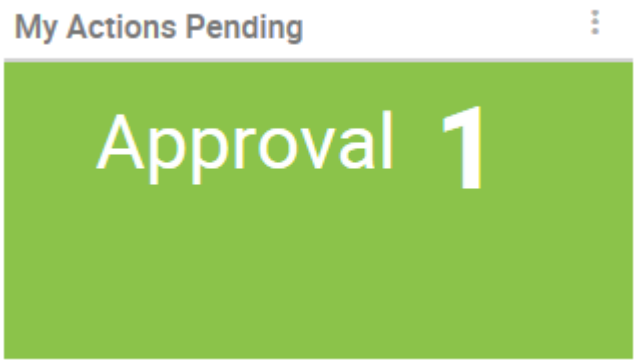


4.2.1.1.9 My Actions Pending Widget

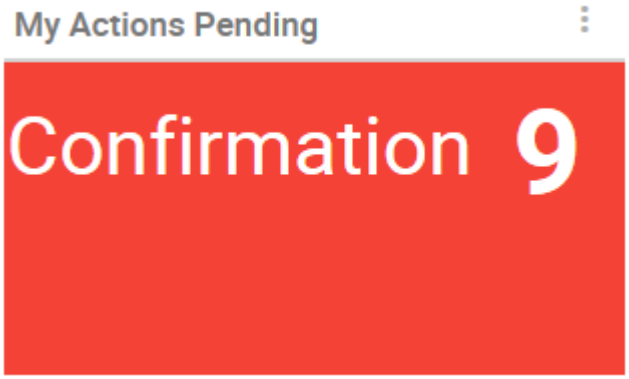
The “My Actions Pending” Widget allows users to feature the number of actions pending assigned to their role. This widget is a good visual tool enabling users to know the number of items they need to act upon, or are requiring their action.

There are 4 different action types that can be applied for this Widget:

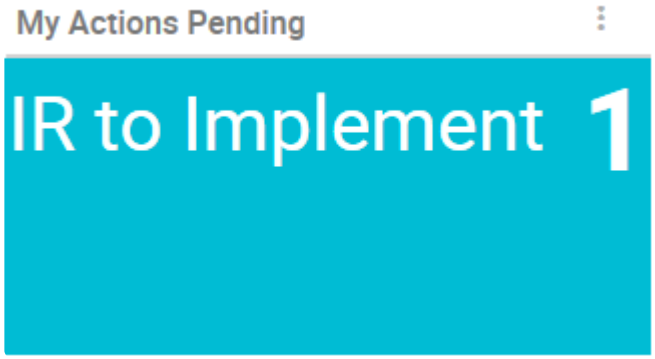
1. Approvals Pending



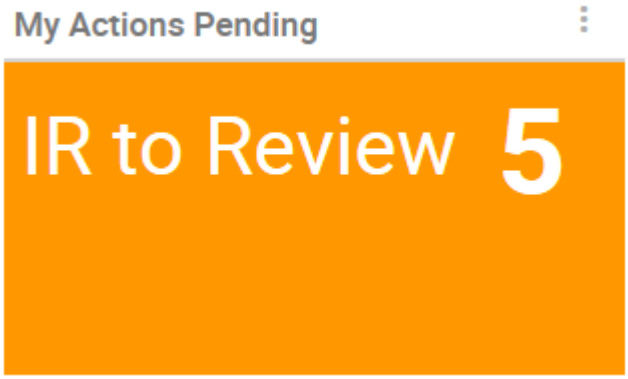
2. Confirmations Pending



3. Improvement Requests to Implement Pending



4. Improvement Requests to Review Pending



> Once a user clicks on any of these Action Pending Widgets from the Home menu, then the user will be redirected to the To Do module

> Users can only display one type of Action Pending per Widget, we recommend adding multiple Widgets to display the different actions pending.

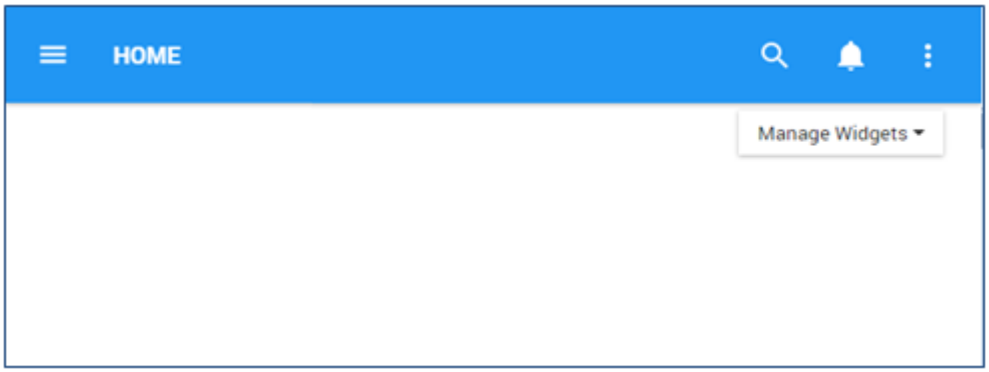
To customize the My Actions Pending Widgets, click here

4.2.1.1.9.1 Customize My Actions Pending Widgets

The My Actions Pending Widget allows users to feature the number of actions pending assigned to their role. This widget is a good visual tool enabling users to know the number of items they need to act upon, or are requiring their action. Users can only display one type of Action Pending per Widget, we recommend adding multiple Widgets to display the different actions pending.

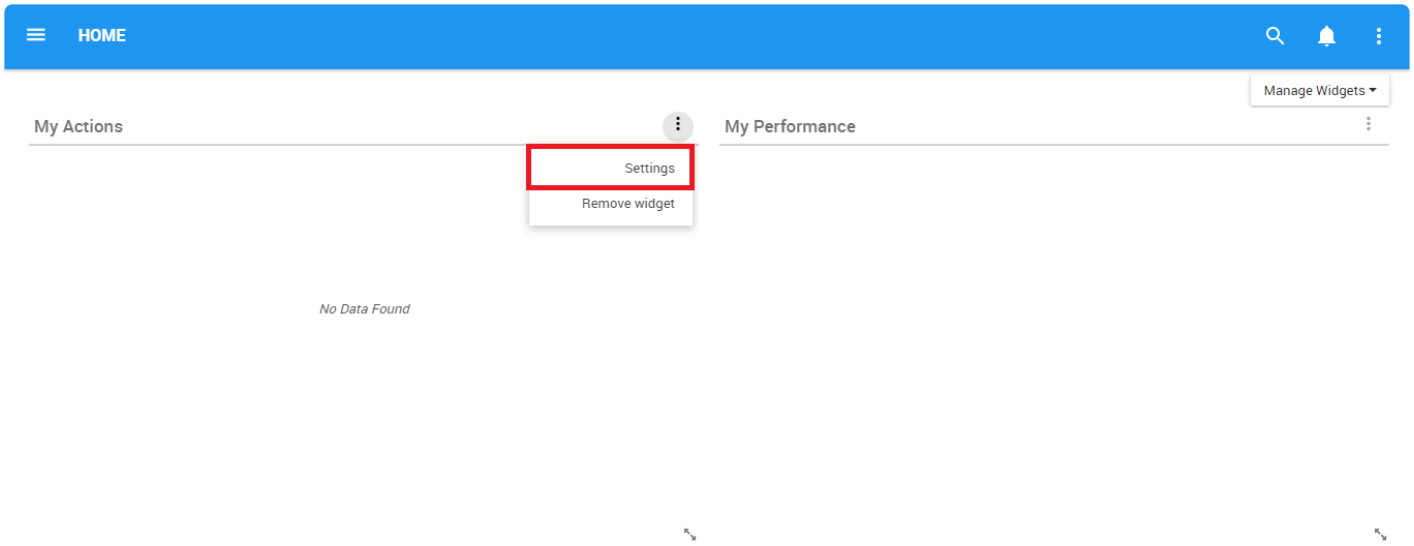
Please follow the instructions below to customize the “My Actions Pending” Widget.

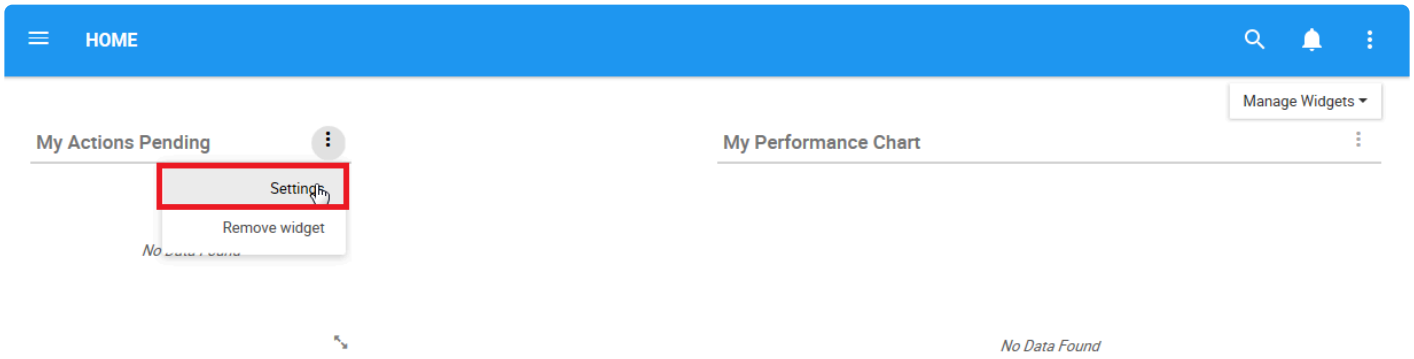
1. Upon login, you will be greeted with the following page:



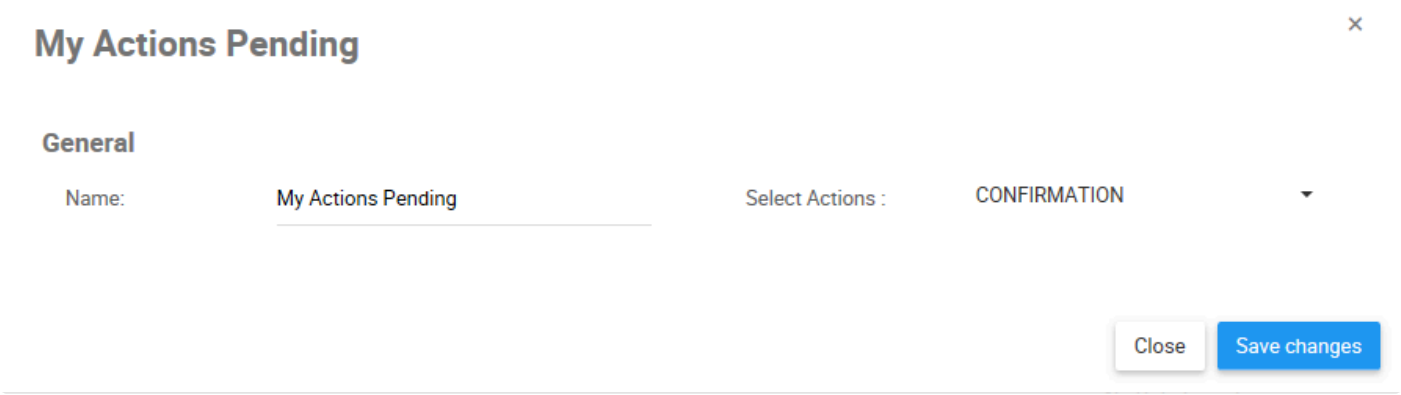
2. To add widgets to your home page, navigate to the the Manage Widgets button and select the widget you want to add from the Dashboard Manager

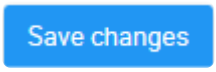
3. Once the “My Actions Pending” Widget has been added to the Home page, select the ⋮ icon at the top right corner of the Widget and select the Settings button.



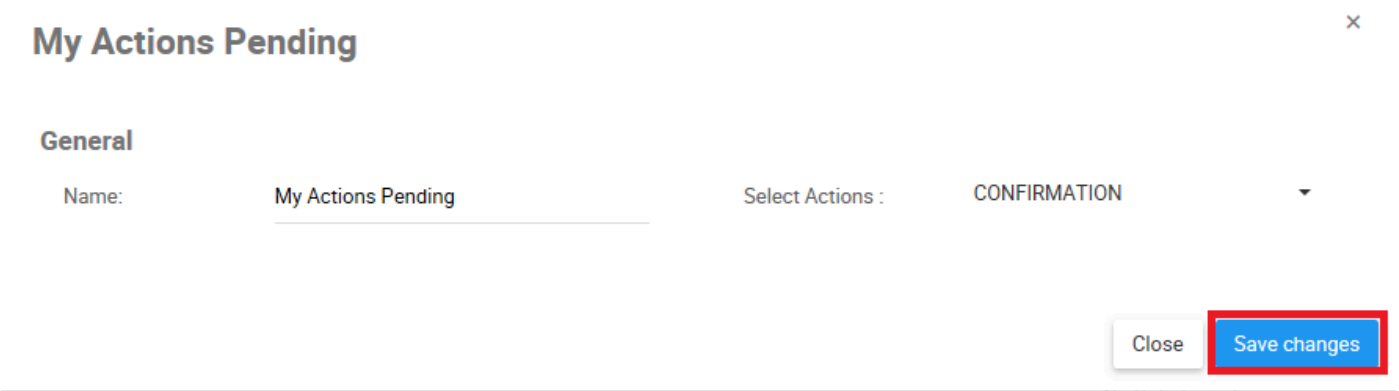


4. Click on the “Settings” button and a pop-up window will be generated as follows



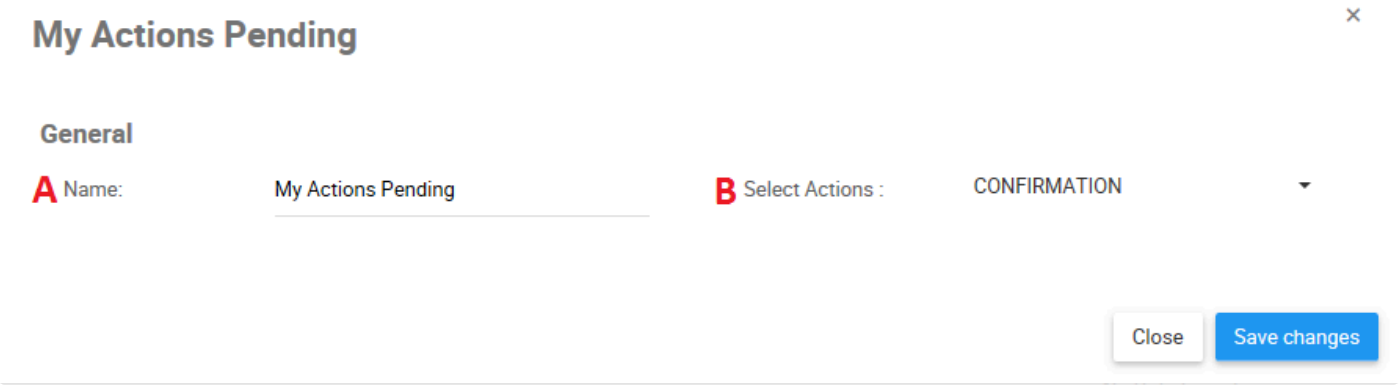
5. After customizing the settings, click on the 

button to save the changes made.



My Actions Pending Widget Settings Parameters

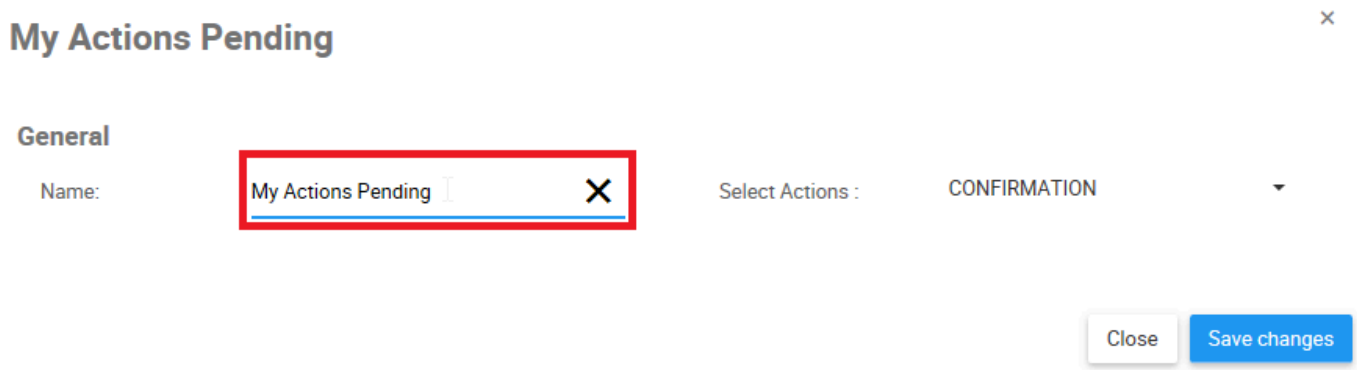
In this page there are a variety of variables that a user can set in order to customize to improve user experience.



Item	Setting	Purpose
A	Name	Allows user to customize the title of the Widget
B	Select Actions	Allows users to select the type of action that he wants to display on the 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

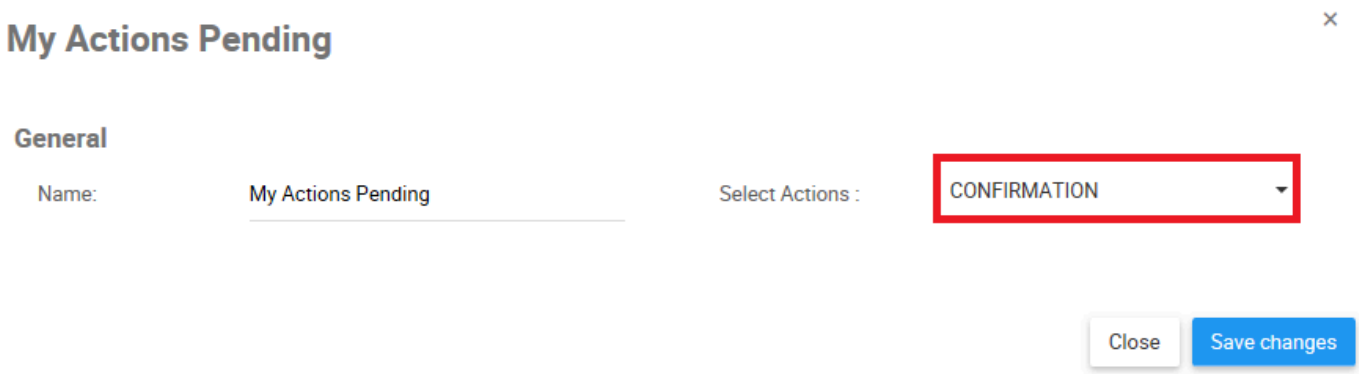
i. Navigate cursor over existing name box



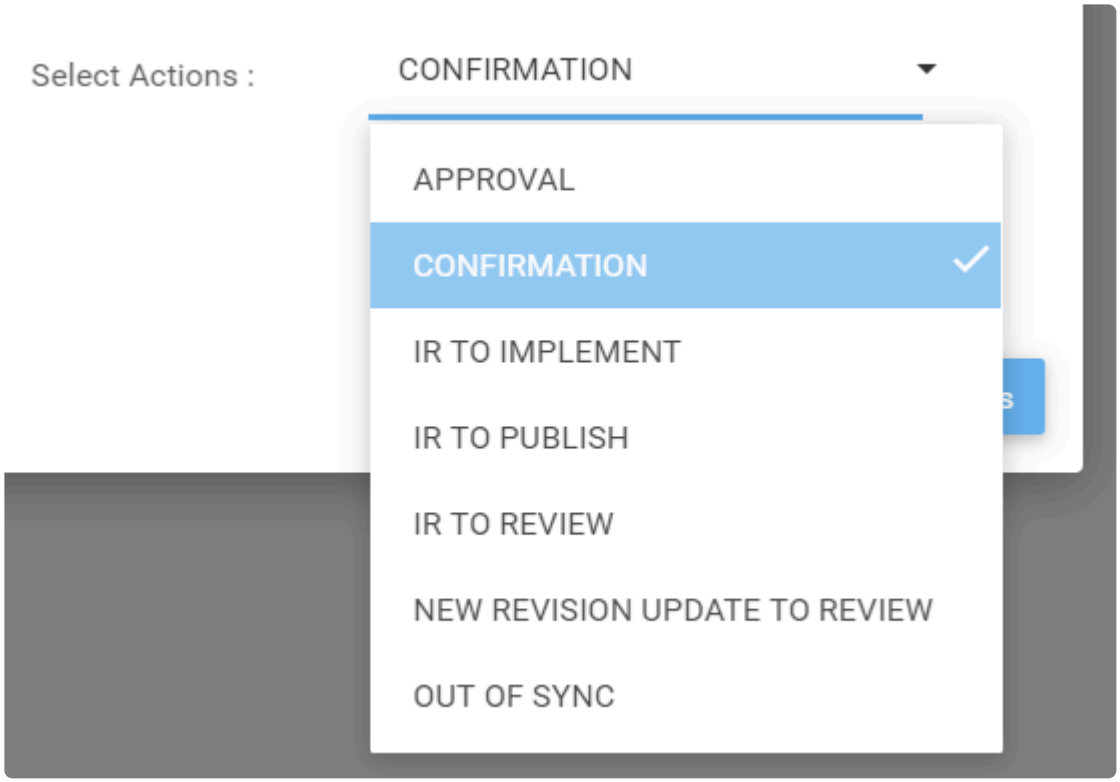
ii. Edit name by selecting name box and typing in desired name

B. **Select Actions:** Five different actions can be chosen to be displayed on the Widget. Each action has its own color and will display the number of actions pending.

i. Navigate cursor over the Indicators task bar



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



iii. Select the desired action to be featured in Widget window by navigating cursor and clicking on respective action.

> You can only choose ONE action per Widget. We recommend adding multiple Widgets to display the different actions.

Actions

Action	Description
Approval	For approval cycles on an object. The user must be assigned as an approver.
Confirmation	For newly published objects on which the user has a RASCI-VS value.
IR to Implement	For IRs needing implementation. The user must be assigned as Implementer and the status of the IR must be “To Implement”
IR to Publish	For IR changes needing publication. The user must be assigned as Implementer and the status of the IR must be “Implemented”
IR to Review	For IRs needing approval. The user must be Accountable on the object and there must be a new IR on the object
New Revision Update to Review	For objects that have changed status from Published to In Progress. The user must be assigned as Implementer on the object

Out of Sync	For objects that are out of sync. See Data Harmonization for more details.

4.2.1.1.10 My Risk Chart

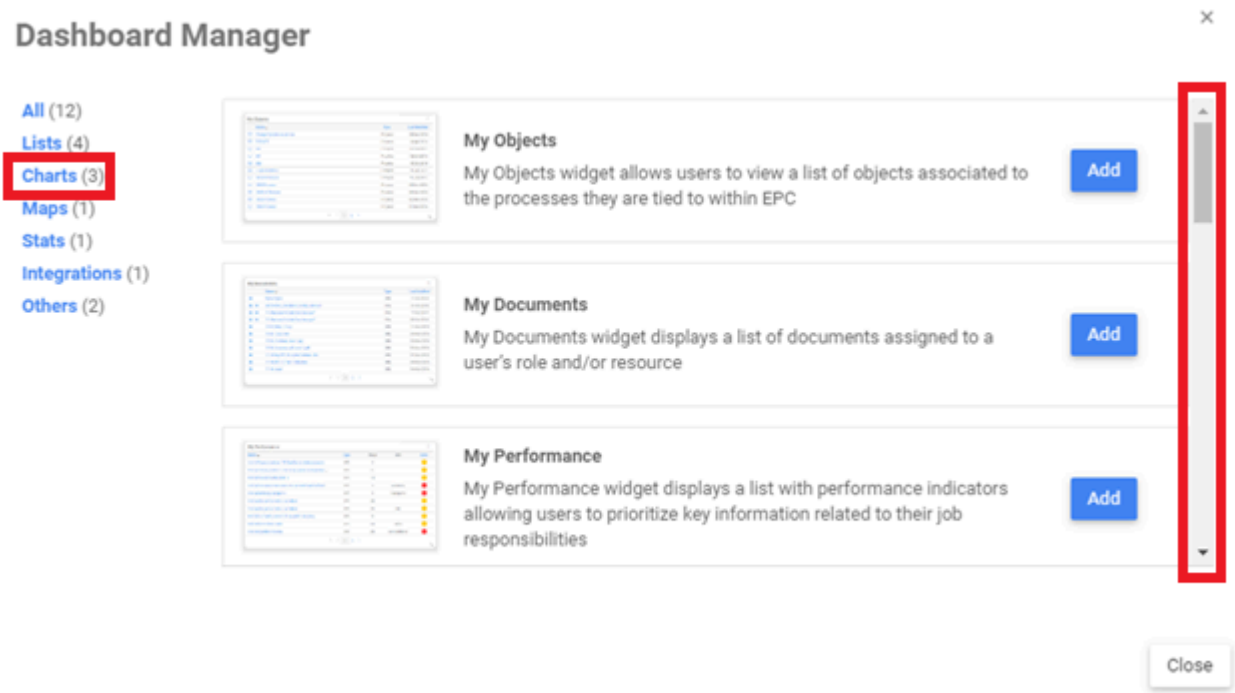
The widget My Risk Chart brings great value when users are in charge or tied to high risk tasks and processes. By adding the widget My Risk Chart to their dashboard, users have access to a pie-chart distribution. It displays the residual priority of all risks by category. Each category can be clicked on to access more specific details.

This widget gives quick visual information to the users, with the percentages of each level of risk appearing on the chart.

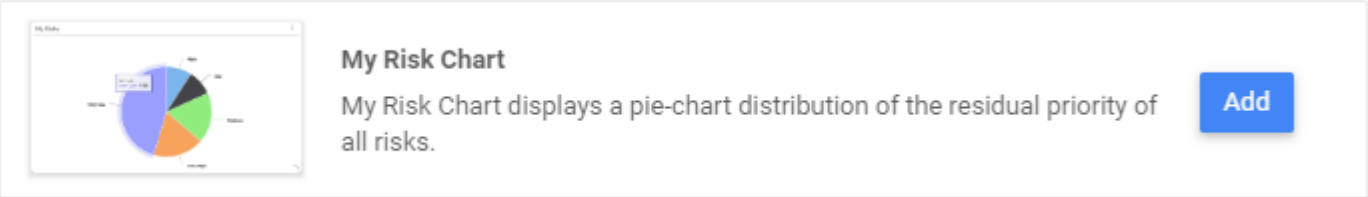
To add the My Risk Chart, the steps to follow are the following:

Like any other widget, you start by following these steps: Add Widgets to Home Page

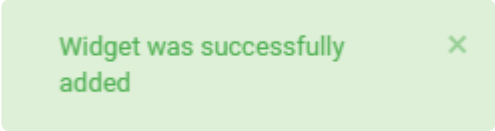
From there, you can:
1. Click on Charts or scroll down to find “My Risk Chart”



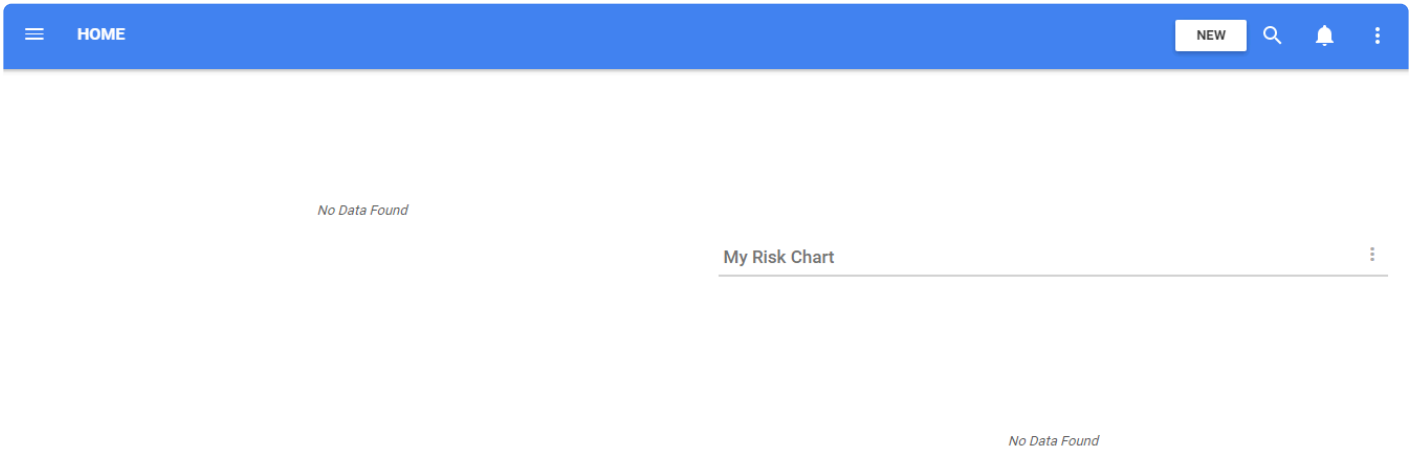
2. Select My Risk Chart by clicking on Add



3. A confirmation message will appear

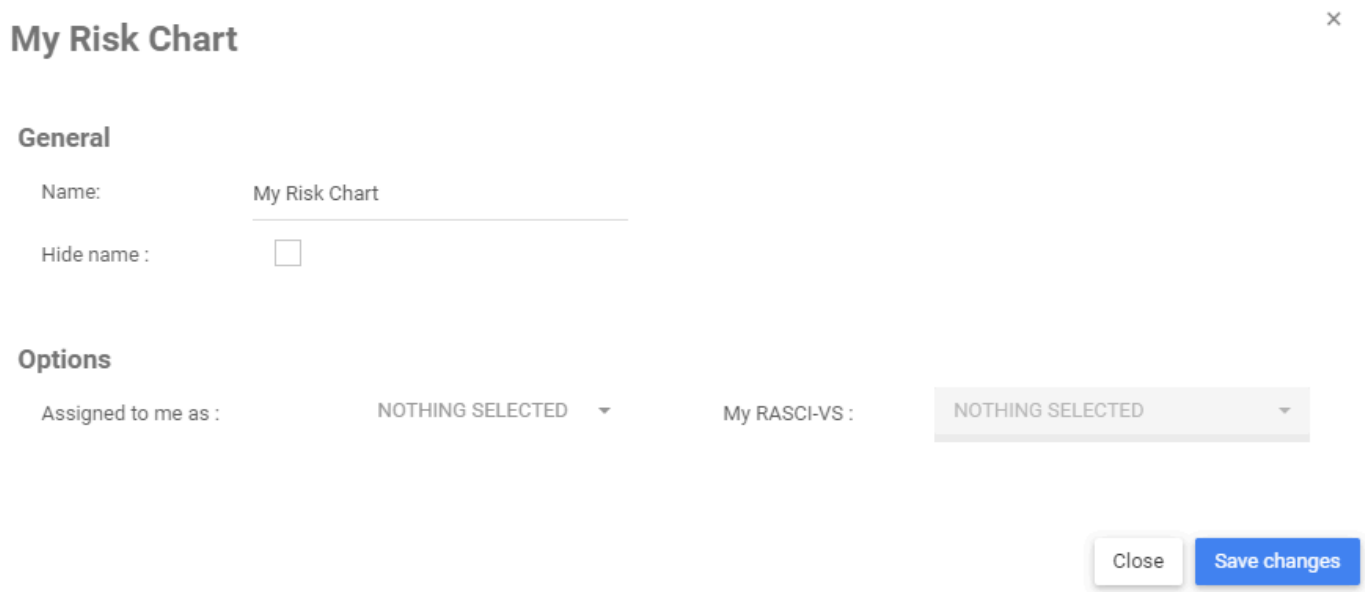


4. Navigate on your Home page to the newly added Widget



5. Select the icon and click on Settings

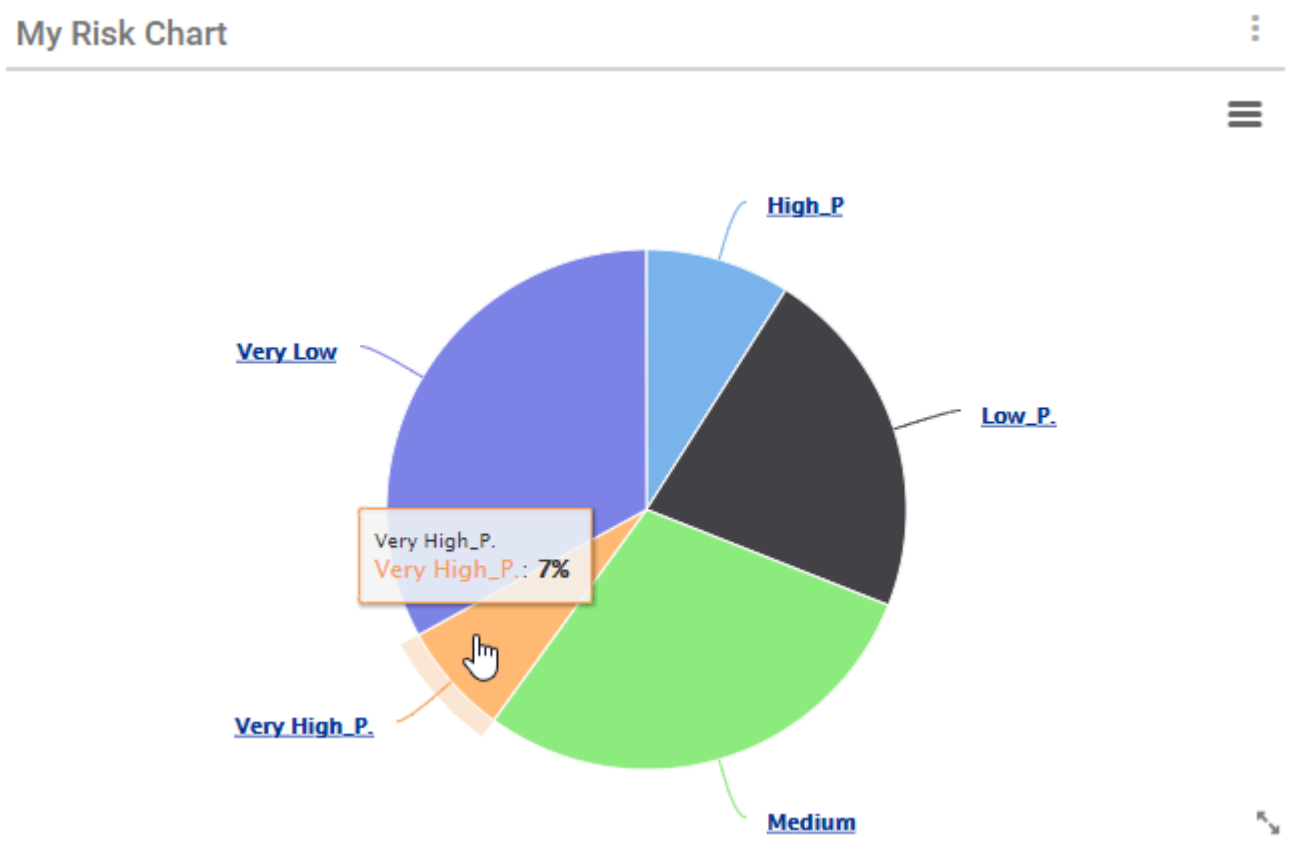
6. The Settings page allows you to select what the chart will take into consideration and display, including the name of the widget



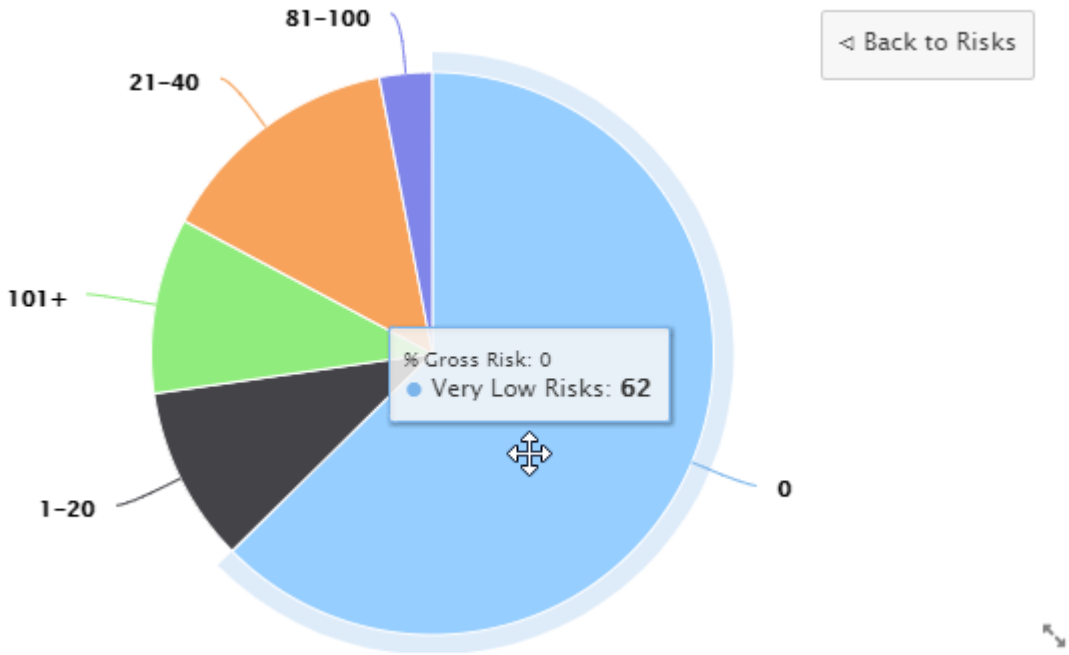
7. The “Assigned to me as” option allows you to select which role(s) and resource you want to take into consideration in the Risk Chart.

8. My RASCI-VS can only be selected once at least one role has been selected for the “Assigned to me as” option. It allows you to see the information related to a specific responsibility you have been given, or multiple responsibilities.

9. Once you have made your selections, a similar Chart will be visible on your Home page:



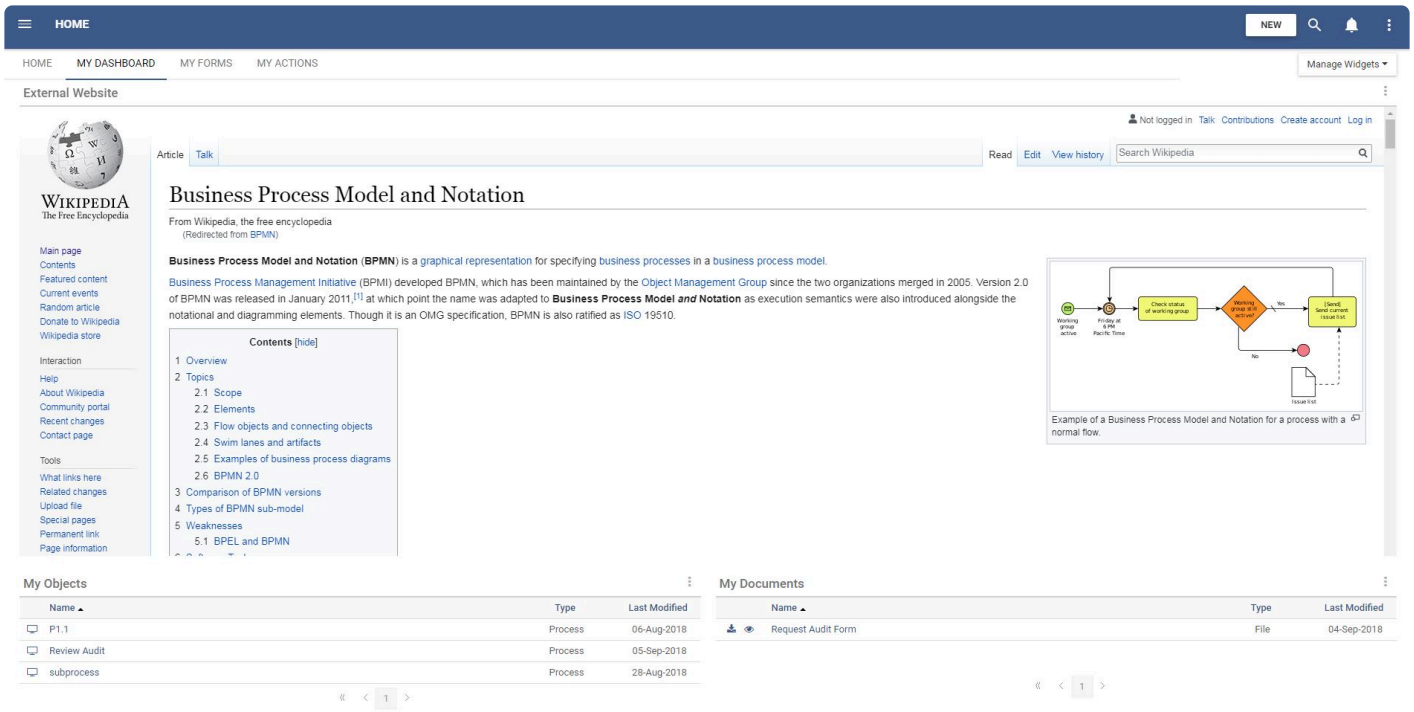
10. You can click on each color of the chart to access more specific information on the percentage of gross risk. You can click on Back to Risks to go back to the previous chart.



4.2.1.1.11 External Website Widget

The External Website Widget allows users to quickly access a website from their home page without having to enter an URL or opening a new tab in the browser. A common use for this widget is to make intranet sites conveniently accessible.

> **!** The external website widget is not compatible with some websites that have higher or particular security settings. For example, https://www.google.com will not work; a connection error will be displayed instead

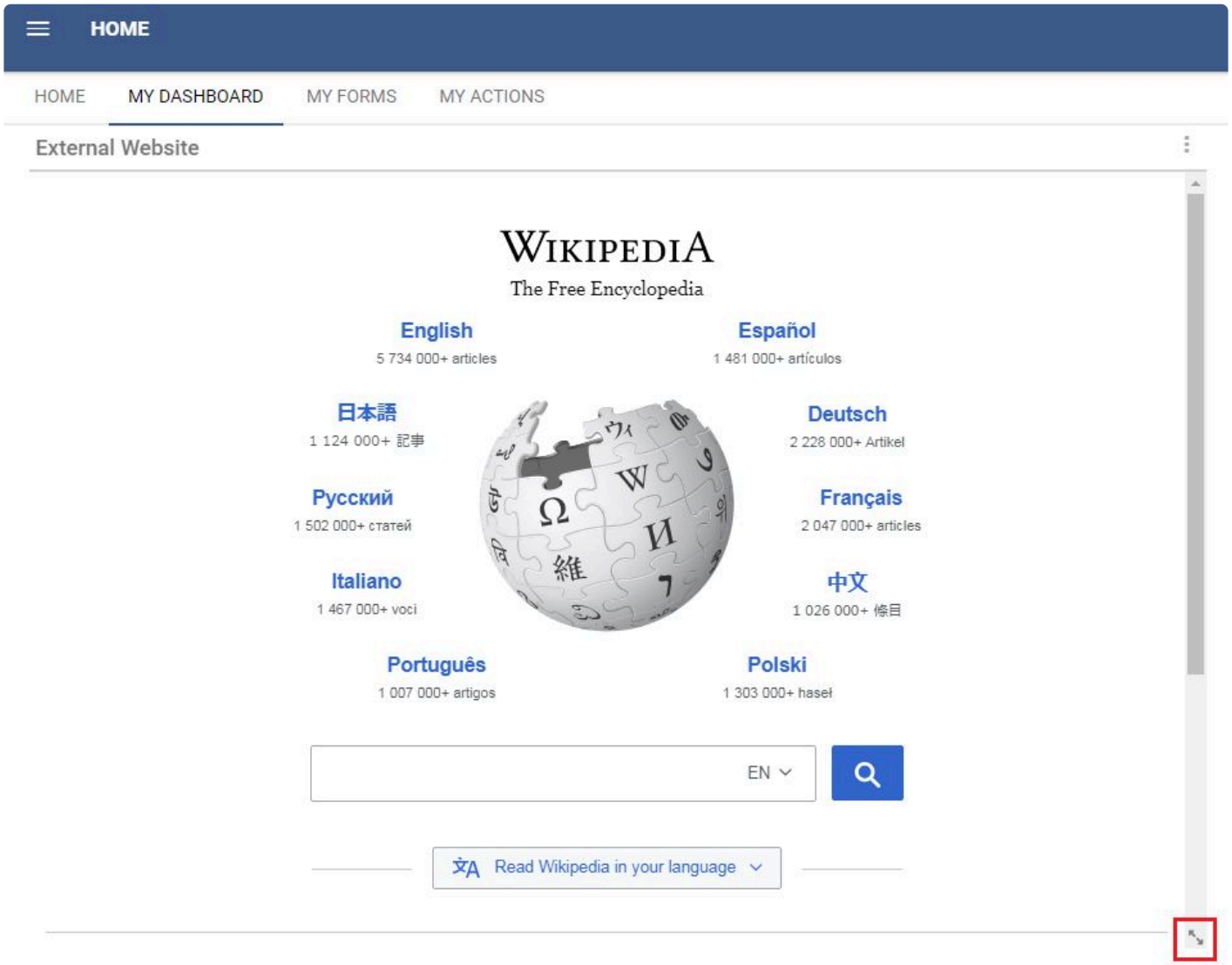


4.2.1.1.11.1 Customizing the External Website Widget

The External Website Widget allows quick and convenient access to a website within the EPC's home page.

Resizing and Moving the Widget

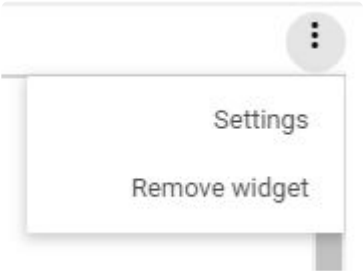
To resize the widget, click on the double-pointed arrow on the bottom right corner. Drag it across the screen to adjust it's size.



To move the widget, click and hold on the widget where the cursor becomes a mover cursor. Drag it to the desired location.

Widget Settings

To access the widget settings, click on the settings icon, then on Settings. To remove the widget, click on Remove Widget.



The widget contains options for the name and website URL.

A	Name	The name of the widget that is displayed on the home page
B	Hide Name	If checked, the name of the widget will be hidden on the home page
C	URL	The URL of the external website. Note that http:// or https:// must be included

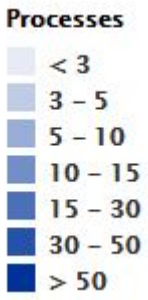
4.2.1.1.12 My Map Widget

The map widget shows how many localized processes there are per country on a world map. It allows companies to quickly determine per country basis where their most concentrated amount of localized processes are.

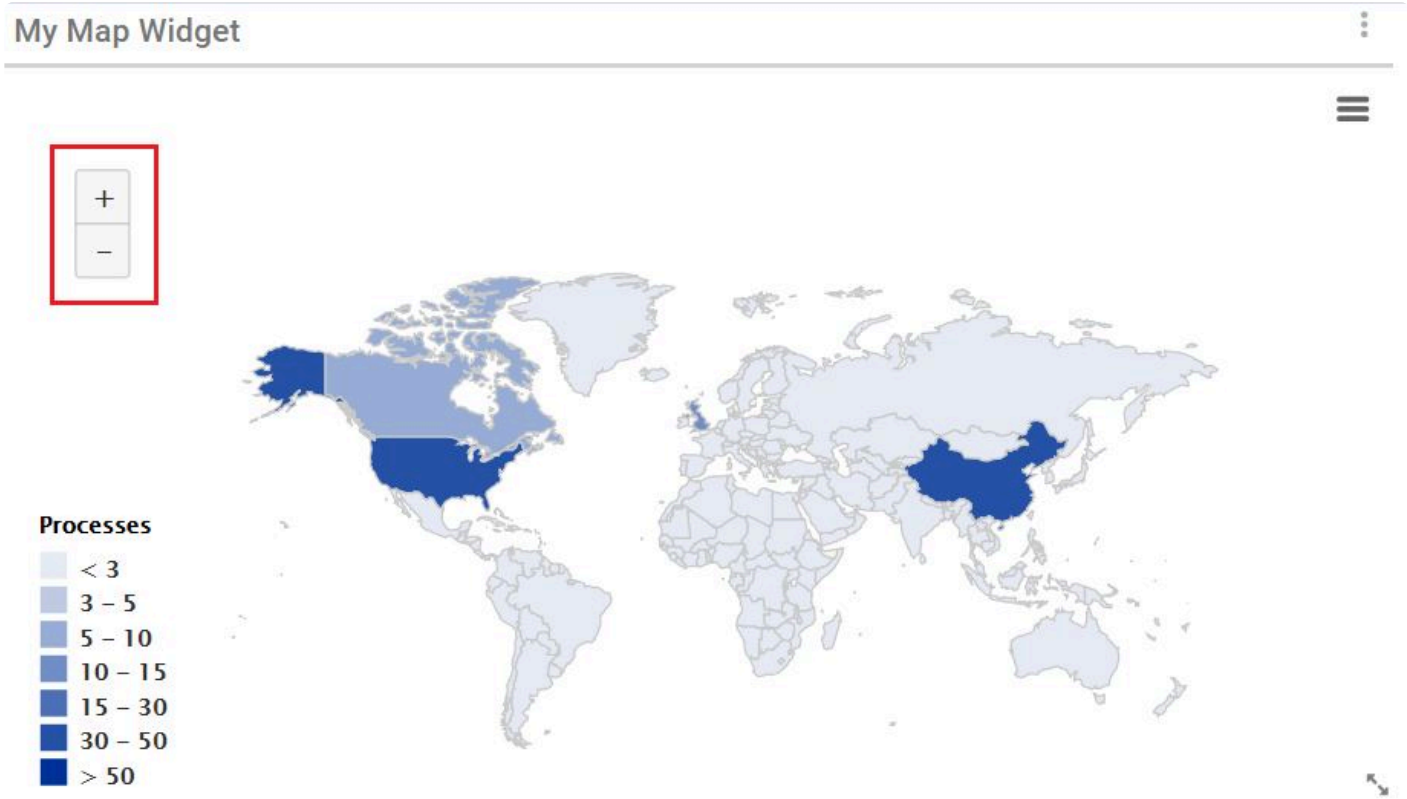
> The widget uses the ISO 3166 Alpha-3 code to detect localized processes. Localization should therefore be set up using the country 3 letter codes in order for this widget to work properly. For example, processes localized with USA will appear on the widget map, but not processes localized using US.

Map Widget Features

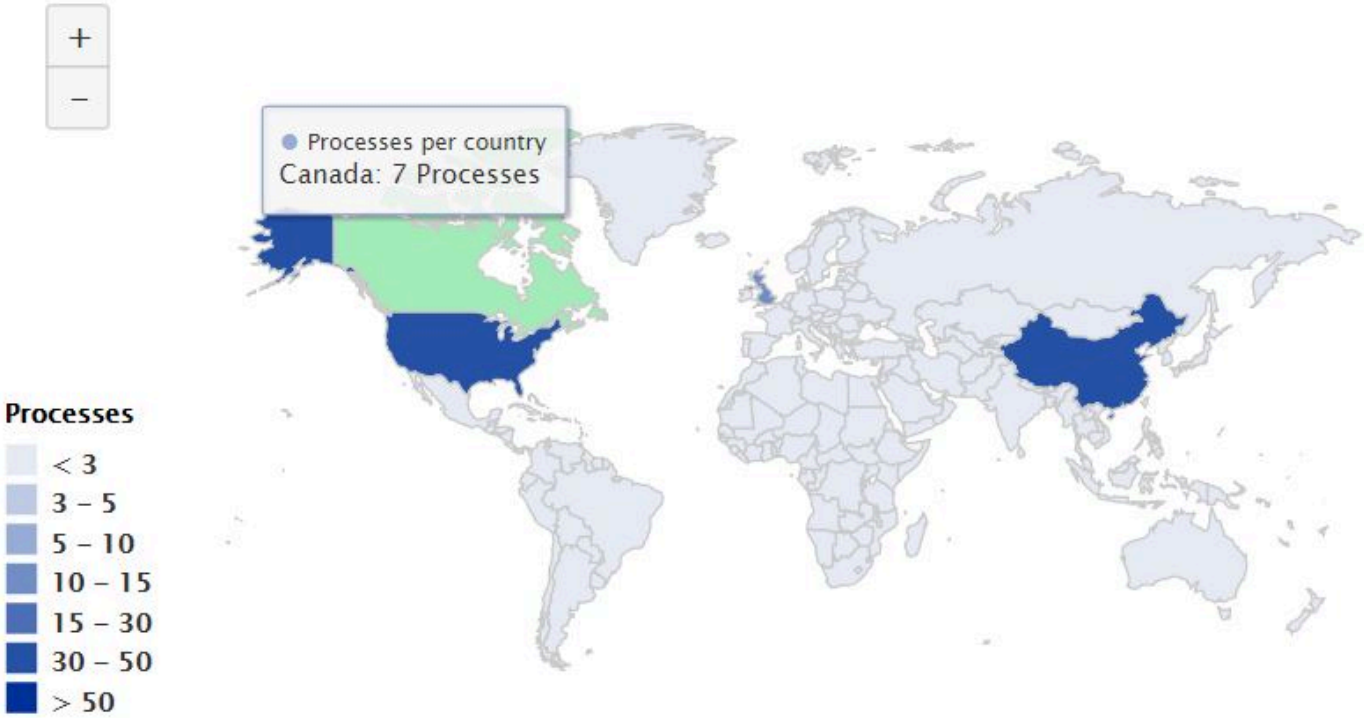
The map is color coded to show where the highest concentration of localized processes are located.



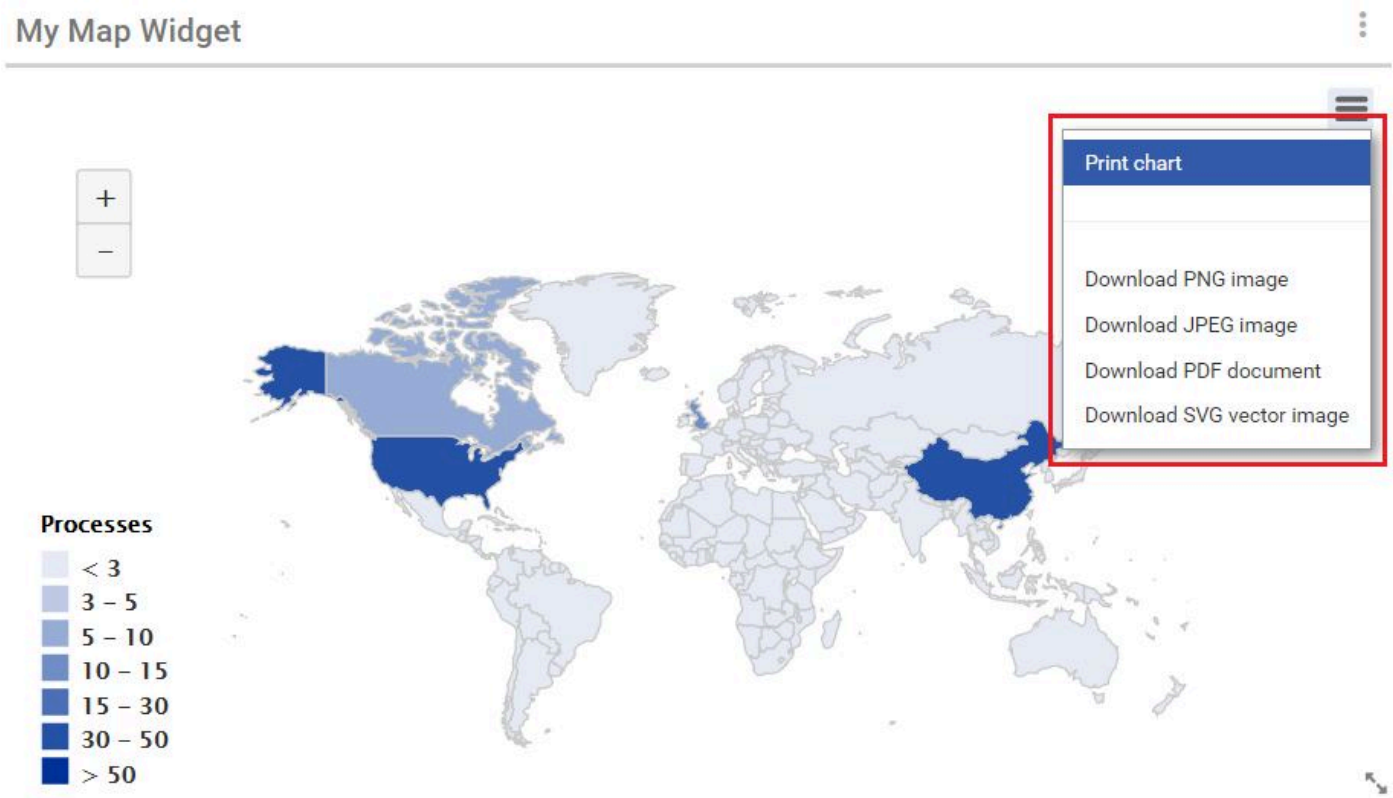
To zoom in or out of the map, use the “+” or “-” buttons.



Hovering the mouse over the country will show how many localized processes exist for that country



The widget can also be printed in various formats



- **Print chart**: Prints the map widget
- **Download PNG Image**: Downloads a picture of the map widget in a PNG format directly on your computer
- **Download JPEG Image**: Downloads a picture of the map widget in a JPEG format directly on your computer
- **Download PDF Document**: Downloads the map widget in a PDF Document format directly on your computer
- **Download SVG Vector Image**: Downloads a picture of the map widget in a SVG format directly on your computer

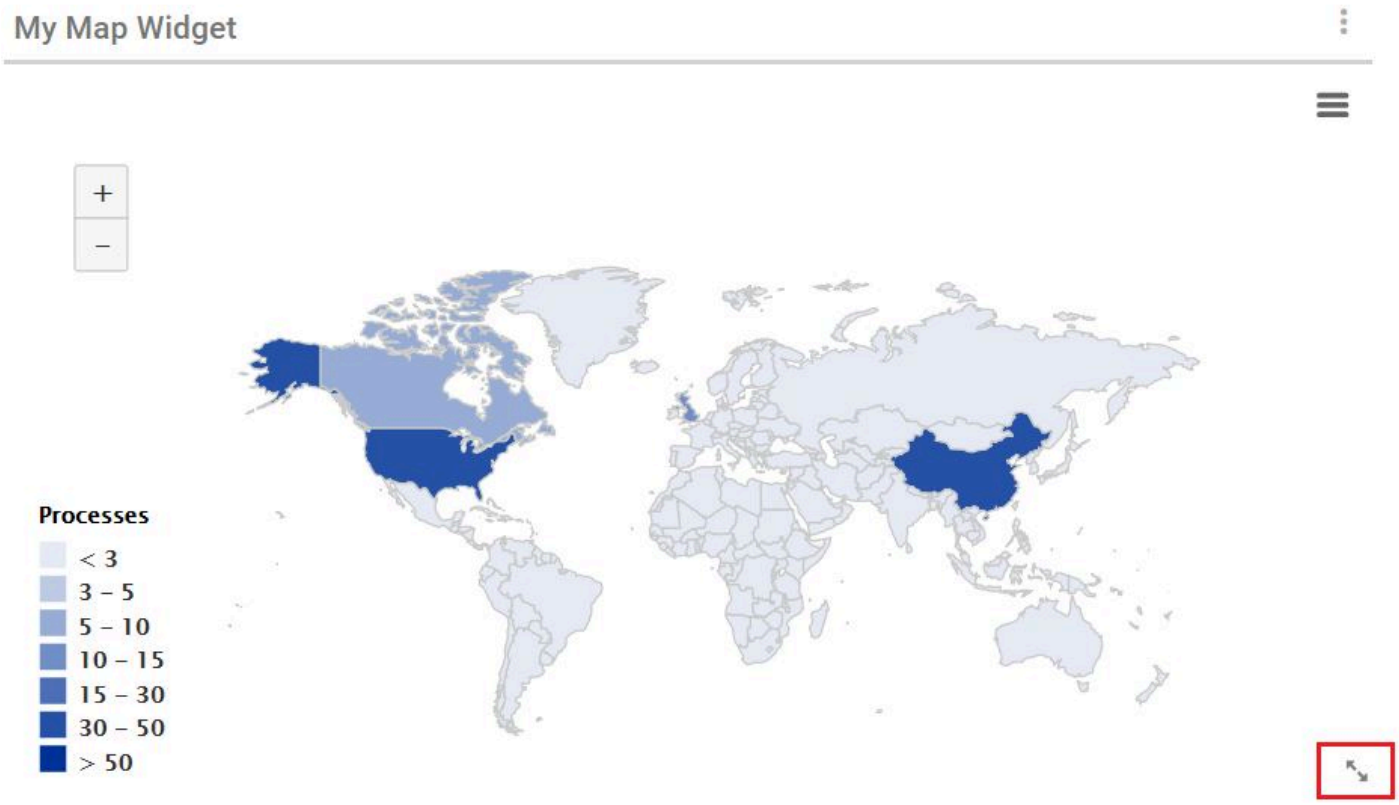
To customize My Map Widget, click here.

4.2.1.1.12.1 Customizing My Map Widget

The Map Widget allows users to quickly determine where their localized processes within EPC are located on a world map.

Moving and Resizing the Widget

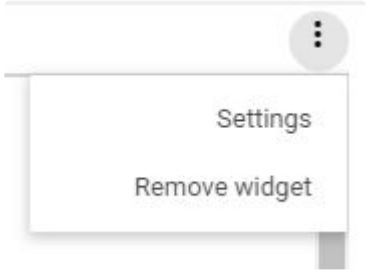
To resize the widget, click on the double ended arrow on the bottom right corner. Drag across the screen to adjust the size.



To move the widget, click and hold on the widget when the cursor becomes a mover cursor. Drag the widget to the desired position.

Settings

To access the widget settings, click on the icon with the 3 dots and click on Settings. To remove the widget, click on Remove Widget.



The widget settings allows the user to set a name and show or hide it.

A	Name	The name of the widget that is displayed on the home page
B	Hide Name	If checked, the name will be hidden on the home page

4.2.1.1.13 HTML Widget

The HTML Widget allows users to display content from external sites, such as videos, news, audio clips, etc. Users can also write their own HTML code into the widget to display custom content, such as a message or announcement.

The widget below contains a video introducing new users to the EPC – the widget can be placed in a default home tab, where all users can see it. The HTML widget can be used for similar purposes and is highly customizable to fit various needs.

To customize the HTML Widget, click here.

4.2.1.1.13.1 Customizing the HTML Widget

The HTML Widget can be used to display external content. Users can also write their own HTML code from scratch, or add content to an existing embedded tag.

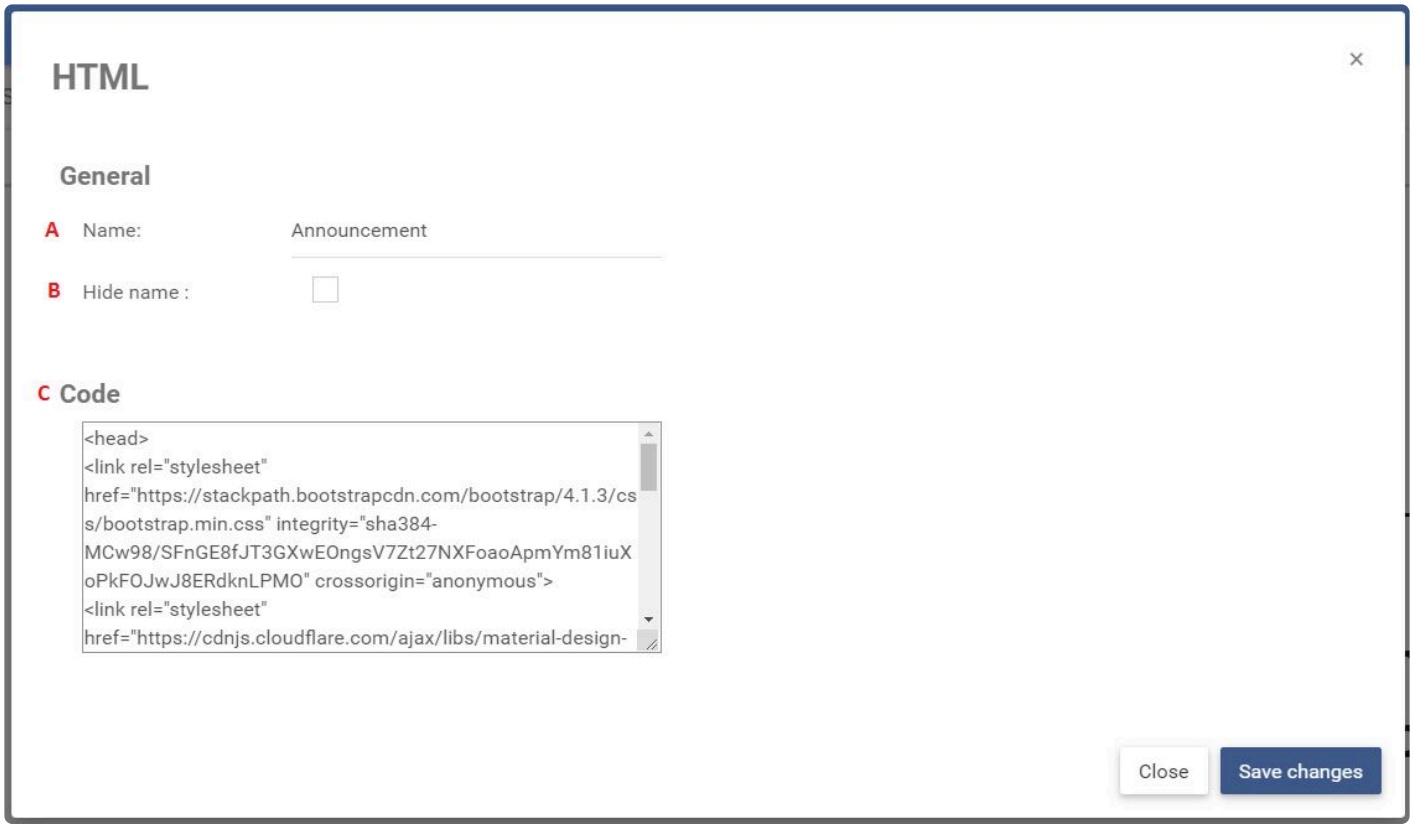
Resizing and Moving the Widget

To resize the widget, click on the double-pointed arrow on the bottom right corner. Drag it across the screen to adjust it's size.

To move the widget, click and hold on the widget where the cursor becomes a mover cursor. Drag it to the desired location.

Settings

Users can change the name of the widget and enter the HTML to display in the widget settings.



A	Name	The name of the widget
B	Hide Name	If checked, the widget name will be hidden
C	Code	Copy/Paste or enter HTML code in this block

To make it easier to see the code, resize the code box by clicking and dragging to bottom right corner of the box, as shown below.

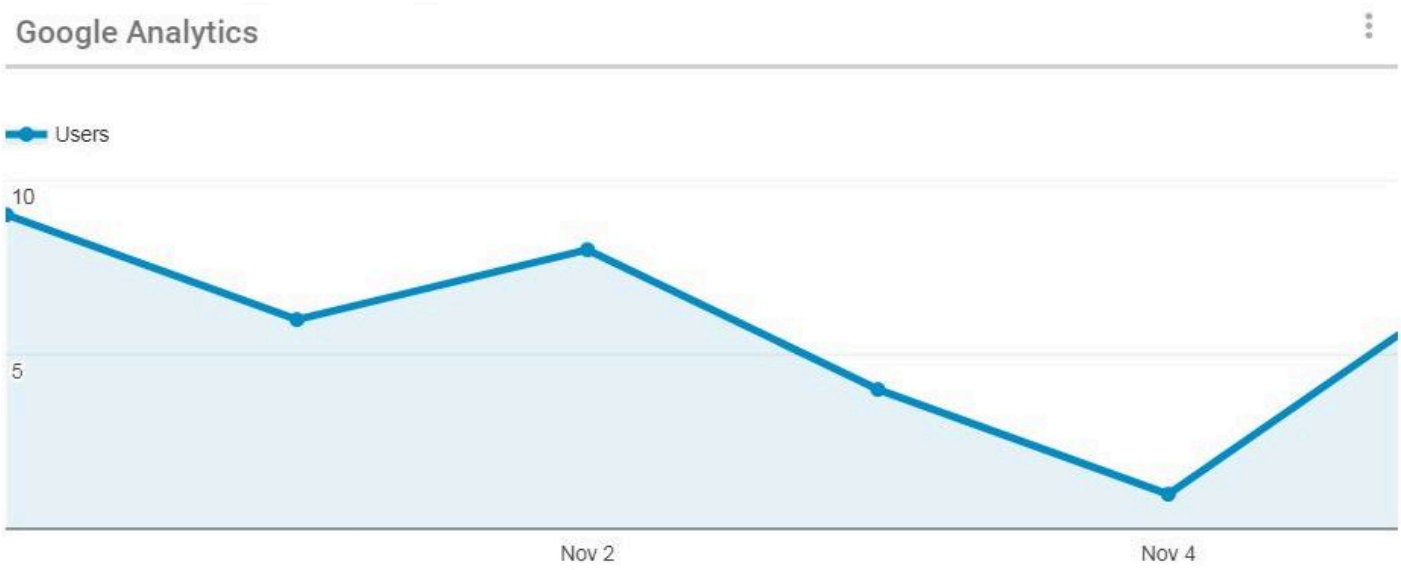
4.2.1.1.14 Google Analytics Widget

The Google Analytics Widget can display various dashboards with different metrics. Users can select charts that display:

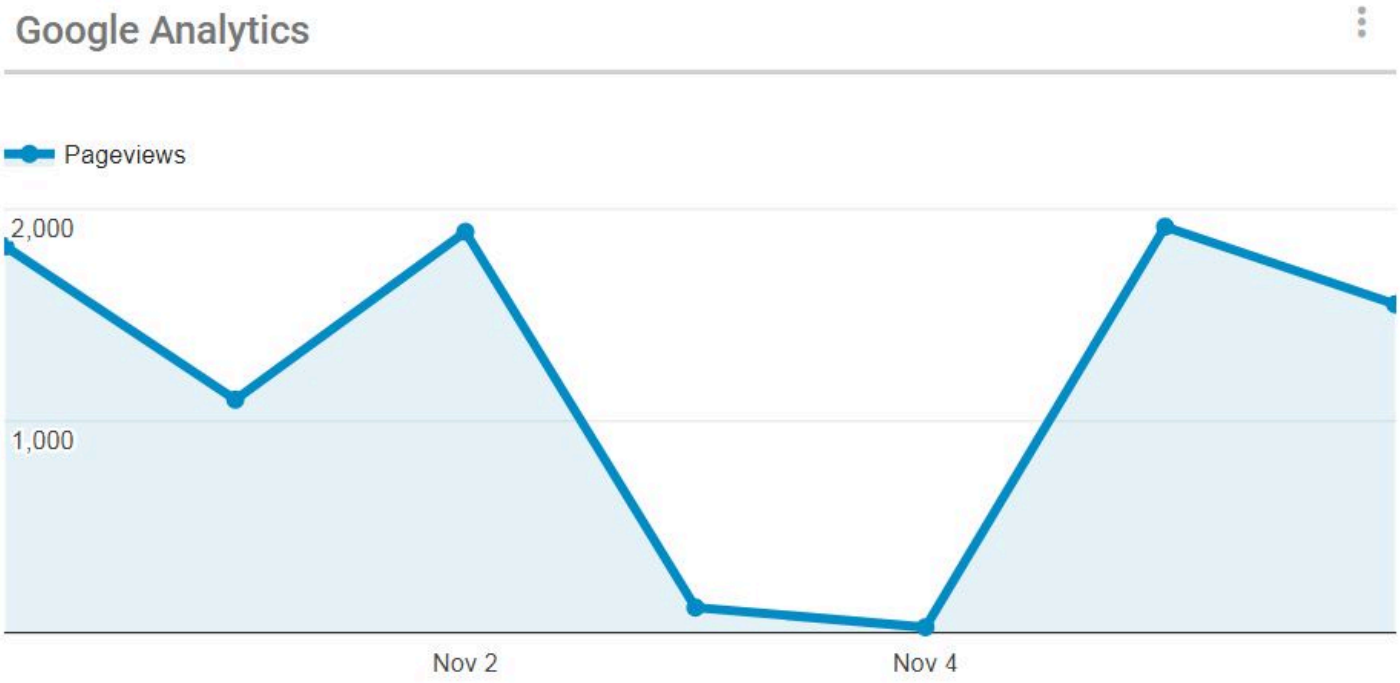
- Visits in the last week
- Visits in the last month
- Page views in the last week
- Page views in the last month
- Sessions per country in the last week
- Sessions per country in the last month

Information is updated in real time; to see changes in the metrics, refresh the page.

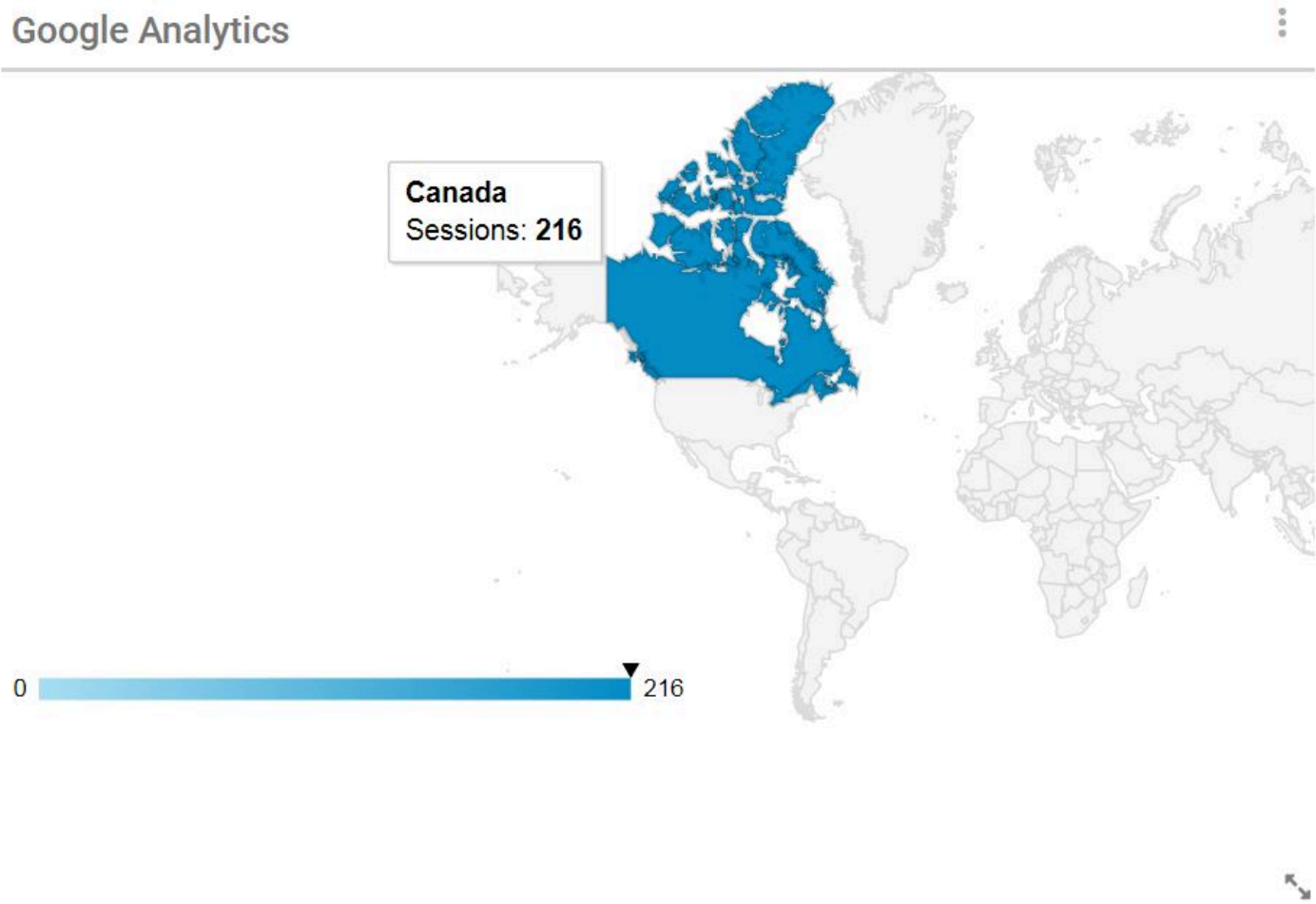
The image below shows a chart for # of user visits in the last week.



The image below shows a chart of the # of page views in the last week.



The image below shows a map of the location of sessions in the last week



You can hover over some elements of the map to obtain more information

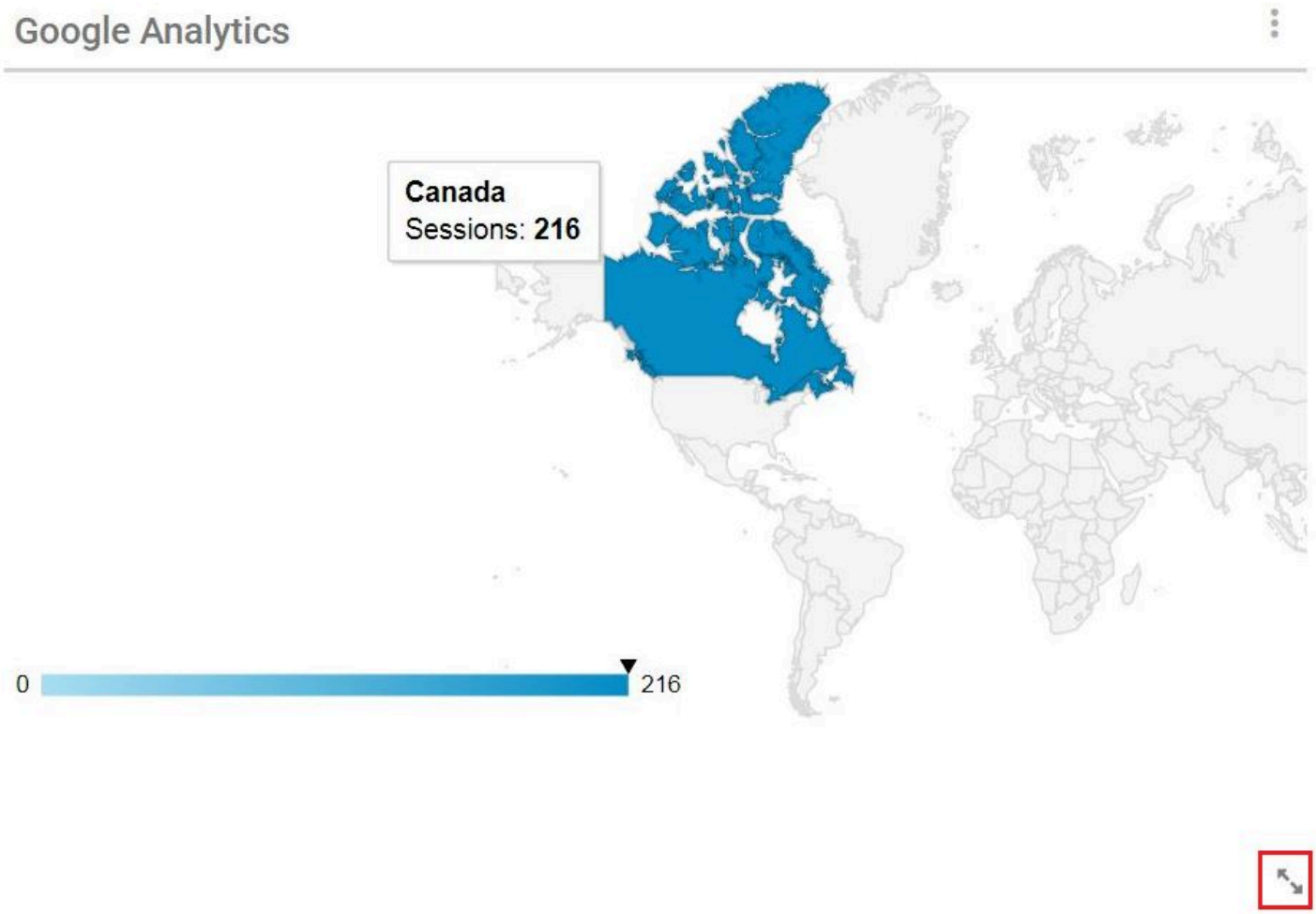
To customize the Google Analytics Widget, click here.

4.2.1.1.14.1 Customizing the Google Analytics Widget

The Google Analytics Widget can display a variety of dashboards with different metrics.

Resizing and Moving the Widget

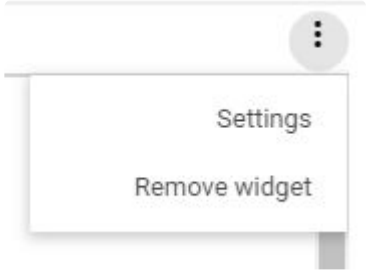
To resize the widget, click on the double-pointed arrow on the bottom right corner. Drag it across the screen to adjust it's size.



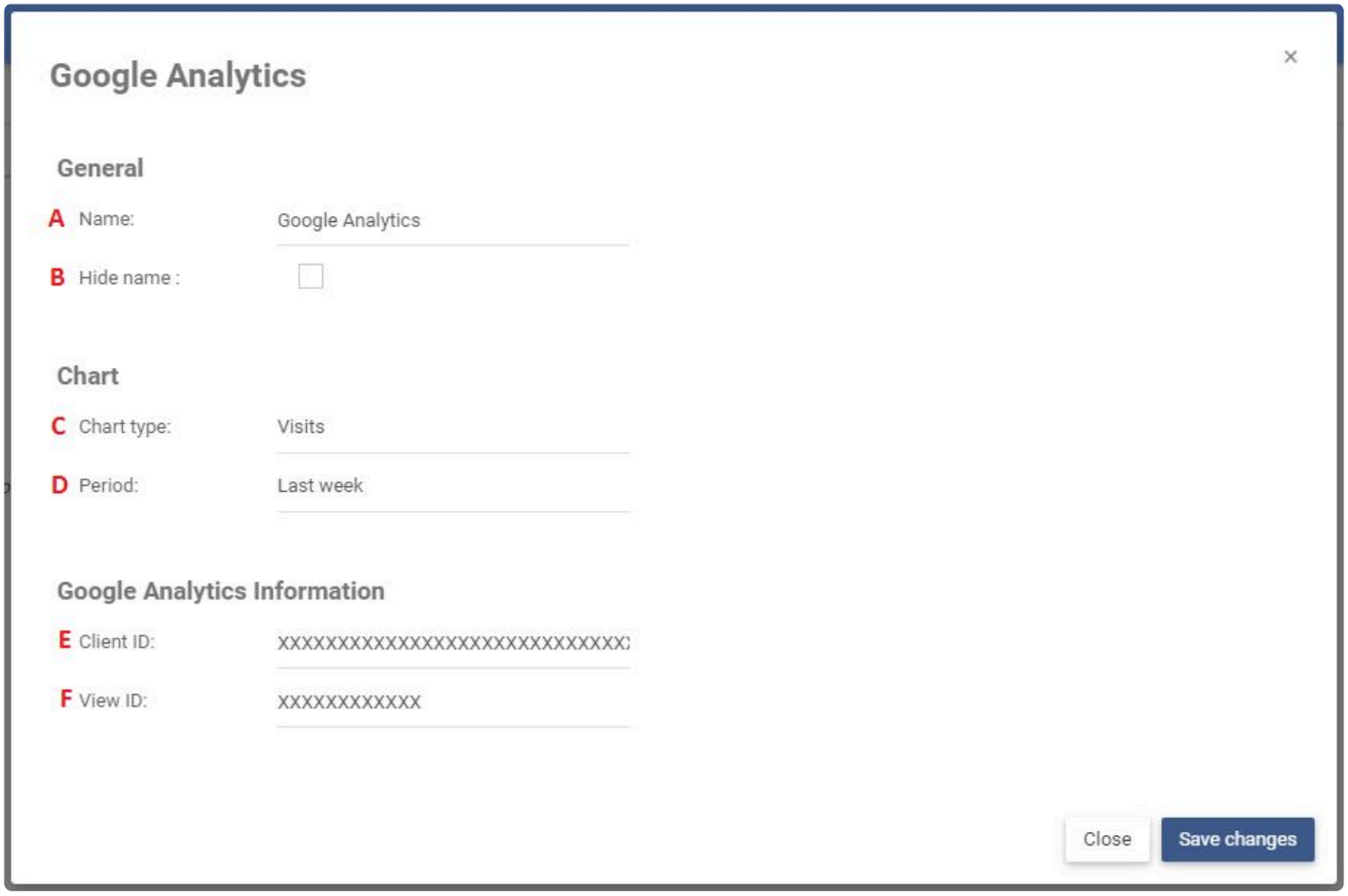
To move the widget, click and hold on the widget where the cursor becomes a mover cursor. Drag it to the desired location.

Settings

To access the widget settings, click on the icon with the 3 dots and click on Settings. To remove the widget, click on Remove Widget.



The widget settings include name settings, chart type and Google Analytics information



To make it easier to identify which type of chart is displaying, give the widget a relevant name.

A	Name	The name of the widget that will be displayed on the home page
B	Hide Name	If checked, the widget name will be hidden
C	Chart Type	The type metric being displayed in the chart
D	Period	The period over which the metric is measured

E	Client ID	Please contact your administrator for the Client ID
F	View ID	Please contact your administrator for the View ID

4.2.1.1.15 Object Sent for Approval widget

The Object sent for approval widget allows user to view and filter all or selected current objects that are sent for approval. Once users access the homepage, they can view a list of objects that are pending approvals by the user or everyone else.

Users can filter by Object type which includes:

1. Asset
2. Attribute
3. Control
4. Document
5. KCI
6. KPI
7. KRI
8. Objective
9. Org Unit
10. Process
11. Report
12. Resource
13. Risk
14. Role
15. Rule

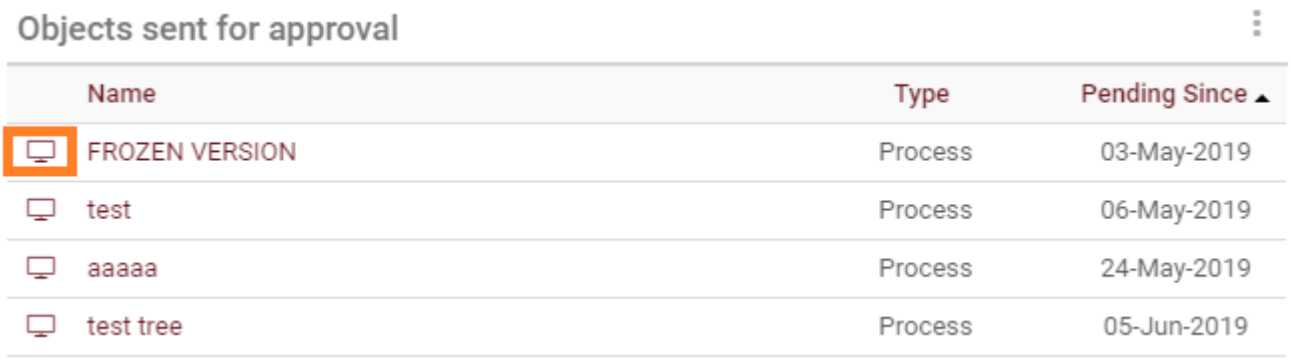
Objects Sent for Approval Widget Components

Component	Description
Name	Name of the Object
Type	Type of Object
Pending Since	The date is was sent for review

Objects Sent for Approval Widget Navigation

1. Navigate to the Home Page and add a “Objects sent for approval” Widget using the Dashboard Manager.

2. Click on the icon to immediately view the object in a graph mode



3. Click on the name of the object to navigate to the item's Detail Page

To customize the Objects Send for Approval Widget, click here

4.2.1.1.15.1 Customizing the Object Sent for Approval widget

The Object Sent for Approval Widget allows a user to view a list of items that are actively pending approval. Customizing “Object sent for approval” will allow a user to view multiple different object types in one or multiple Widget windows based on personal preference.

Please follow the instruction below to customize the “ Objects Sent for Approval” Widget.

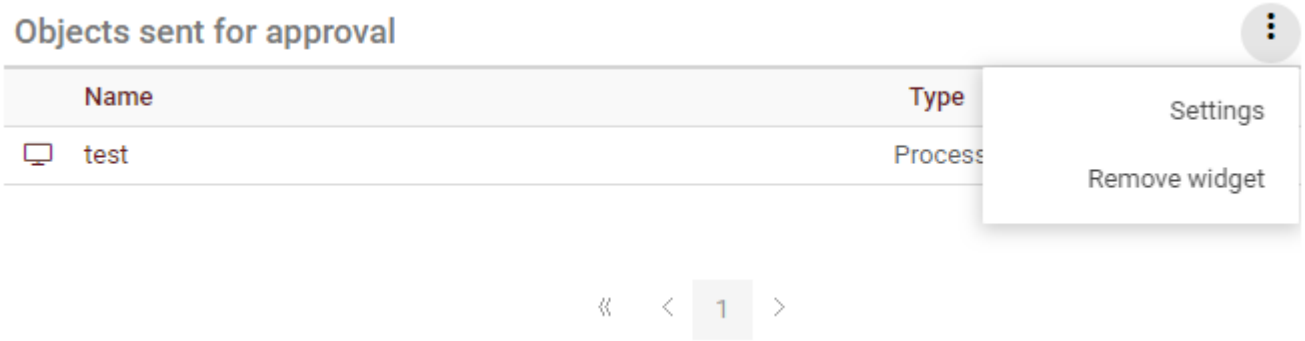
1. Upon login, you will be greeted with the following page:

2. To add widgets to your home page, navigate to the

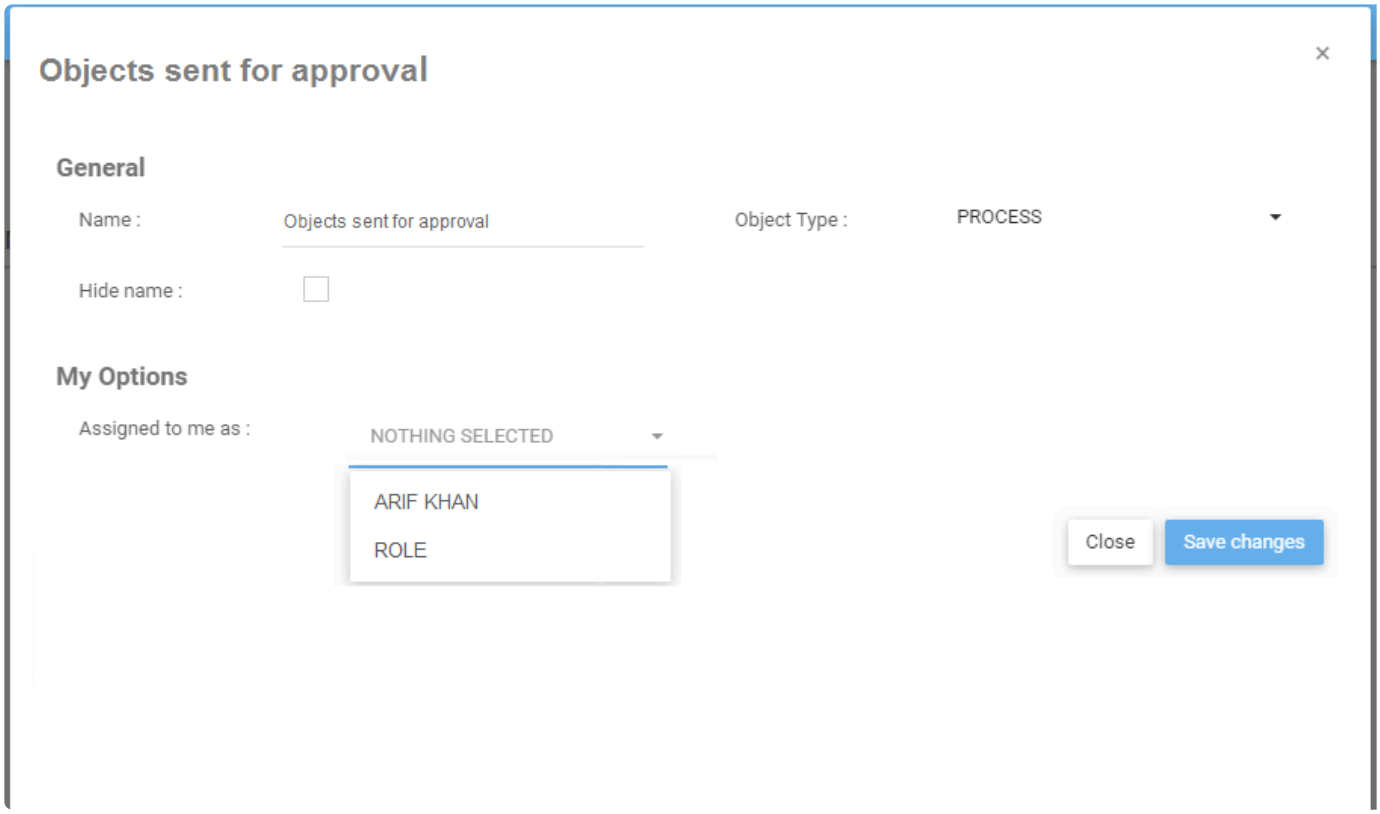
button and select the widget you want to add from the Dashboard Manager.

3. Once the “Object Sent for approval” Widget has been added to the Homepage, select the

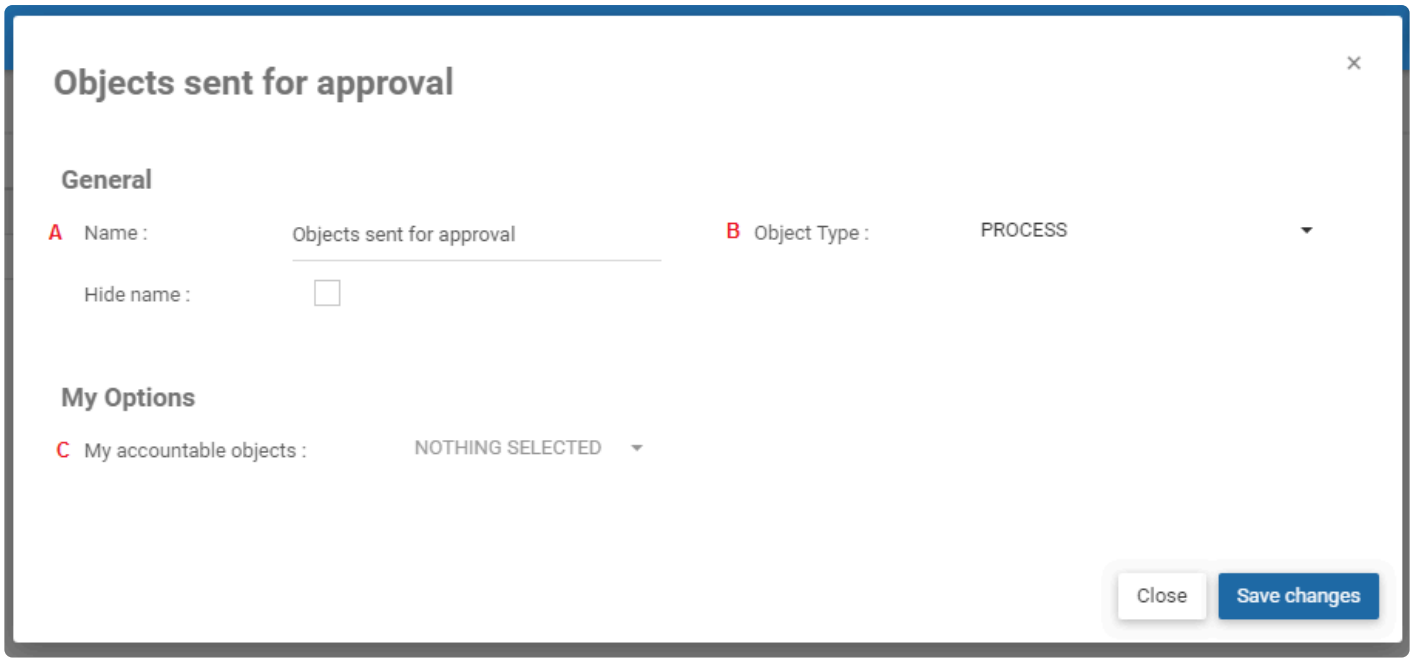
icon at the top right corner of the Widget and select the Setting button.

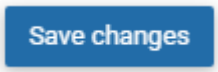


4. Click on the “Settings” option and a pop-up window will be generated as follows



5. Users will have 3 major fields that can be edited in the “my Actions” Widget



6. After customizing the settings, click on the 

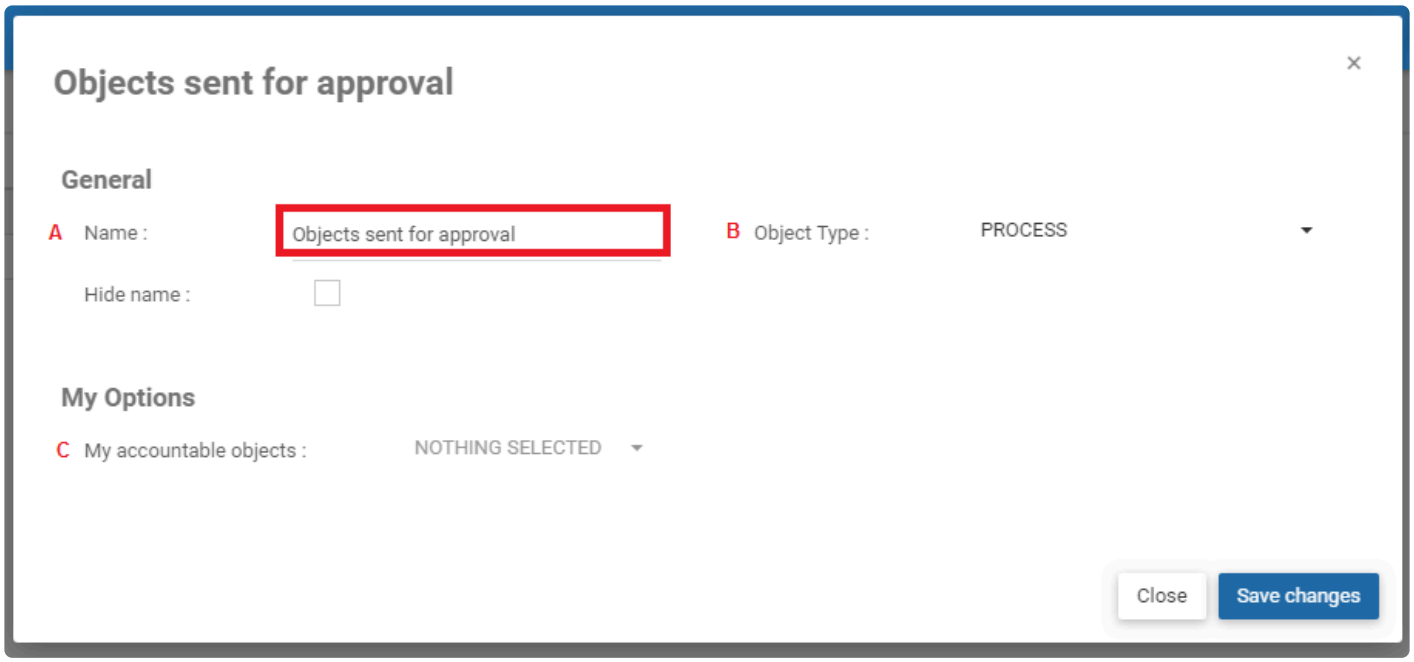
button to save the changes made.

Object Sent for Approval Parameters

Item	Setting	Purpose
A	Name	Allow user to customize the title of Widget
B	Object Type	The primary filter of the “Object sent for approval” Allow users to select a specific object type to be featured
C	My accountable objects	Allow users to filter through their assigned Roles and Resources
D	Hide Name	Hide the name of the 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

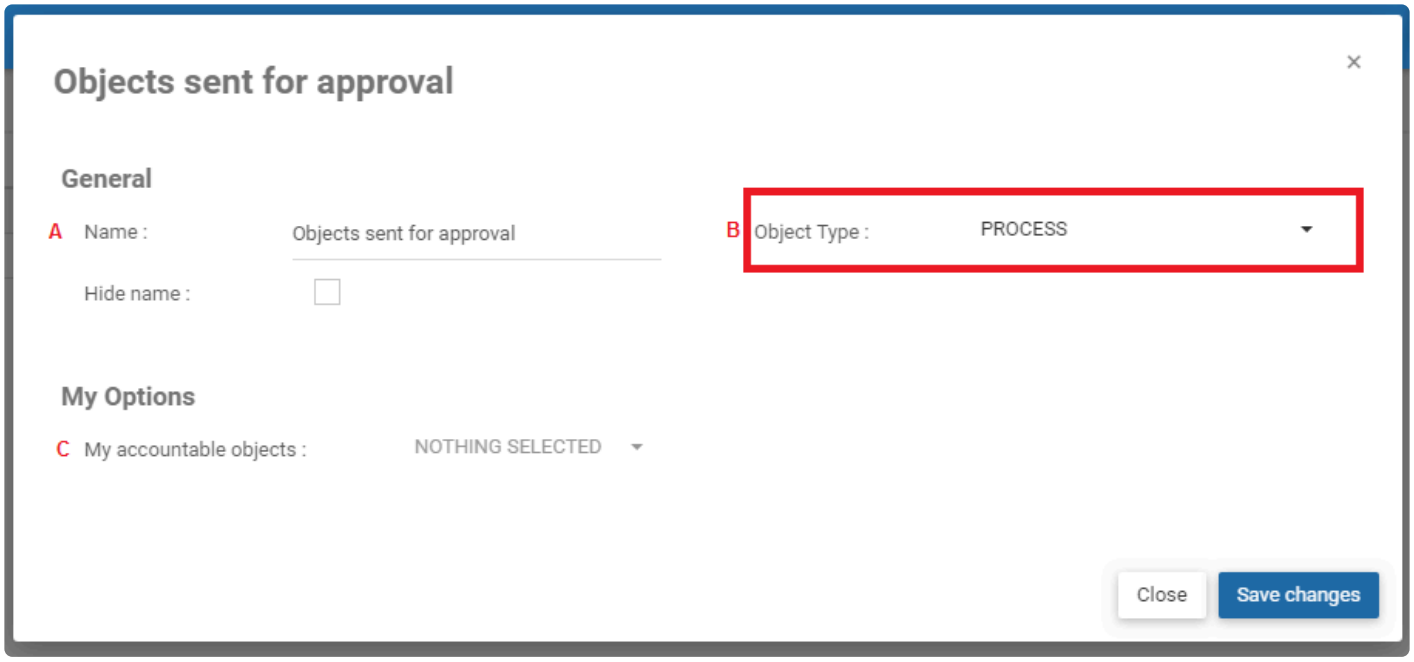
i. Navigate cursor over existing name box



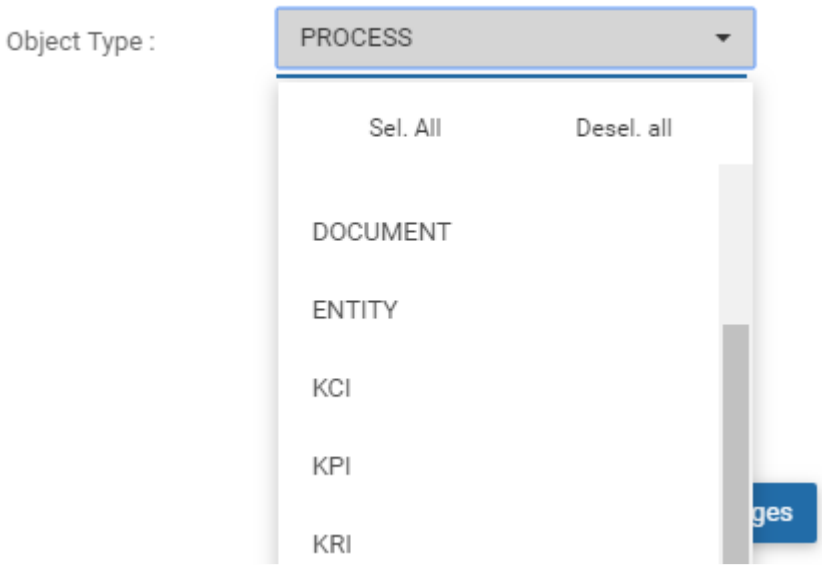
ii. Edit name by selecting name box and typing in the desired name

B **Object Type**: The object type is the primary filter of the “Object send for approval”. The filter is set by default for Process type. To select objects to be featured in a Widget, use the “Object Type” field and follow the instruction below:

i. Navigate cursor over the object type taskbar



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



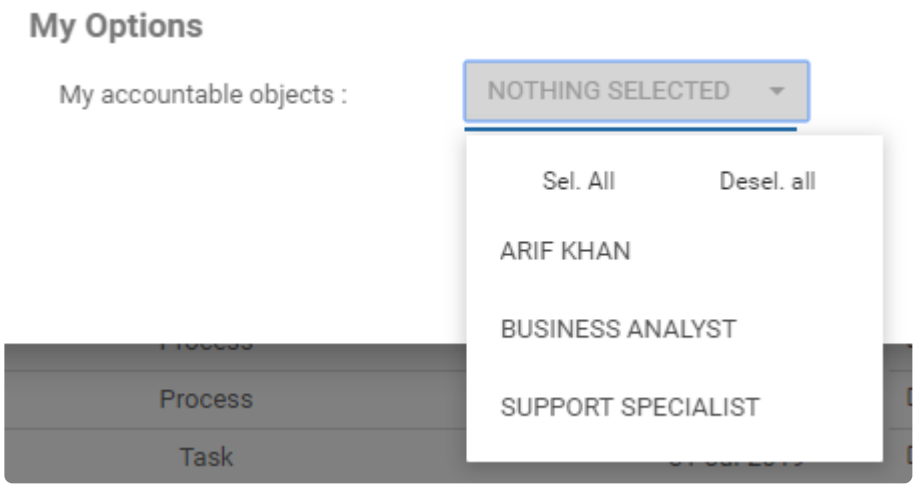
iii. Select/ Deselect desired objects to be featured in Widget window by navigating cursor and clicking on respective objects. Additionally, the drop-down menu features Sel. All and Desel. all buttons that can be used for mass selection.

C **My accountable objects**: Role 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:

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 (Business Analyst and Support Specialist) and with his specific resource profile (Arif Khan).



4.2.1.1.16 Object Sent for Endorsement widget

The Object sent for endorsement widget allows a user to view and filter all or selected current objects that are pending endorsement. Once the user accesses the homepage, they can view a list of objects that are pending endorsement by the user or everyone else.

User can filter by Objects type which includes:

1. Asset
2. Attribute
3. Control
4. Document
5. KCI
6. KPI
7. KRI
8. Objective
9. Org Unit
10. Process
11. Report
12. Resource
13. Risk
14. Role
15. Rule

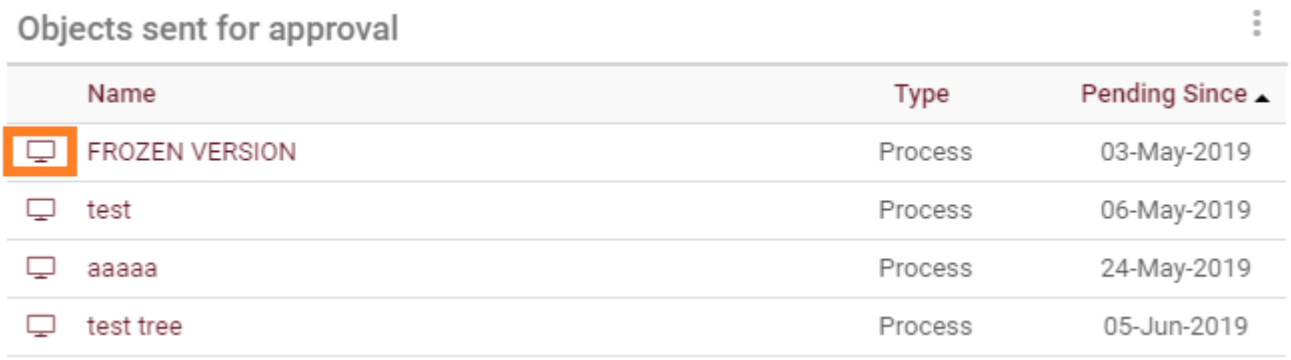
Objects Sent for Endorsement Widget Components

Component	Description
Name	Name of the Object
Type	Type of Object
Pending Since	The date it was sent for review

Objects Sent for Endorsement Widget Navigation

1. Navigate to the Home Page and add a “Objects sent for endorsement” Widget using the Dashboard Manager.

2. Click on the icon to immediately view the object in a graph mode



3. Click on the name of the object to navigate to the item's Detail Page

To customize the Objects Send for Endorsement Widget, click here

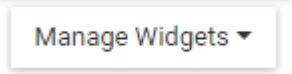
4.2.1.1.16.1 Customizing the Object Sent for Endorsement widget

The Object Sent for Endorsement Widget allows the user to view a list of items that are actively pending endorsement.
The user is able to view all pending endorsement sent by everyone including themselves as a default setting or filter to view only selected objects which the users' role or resource is accountable for.

Customizing "Object sent for endorsement" will allow the user to view multiple different object types in one or multiple Widget windows based on personal preference.

Please follow the instruction below to customize the " Objects Sent for Endorsement" Widget.

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

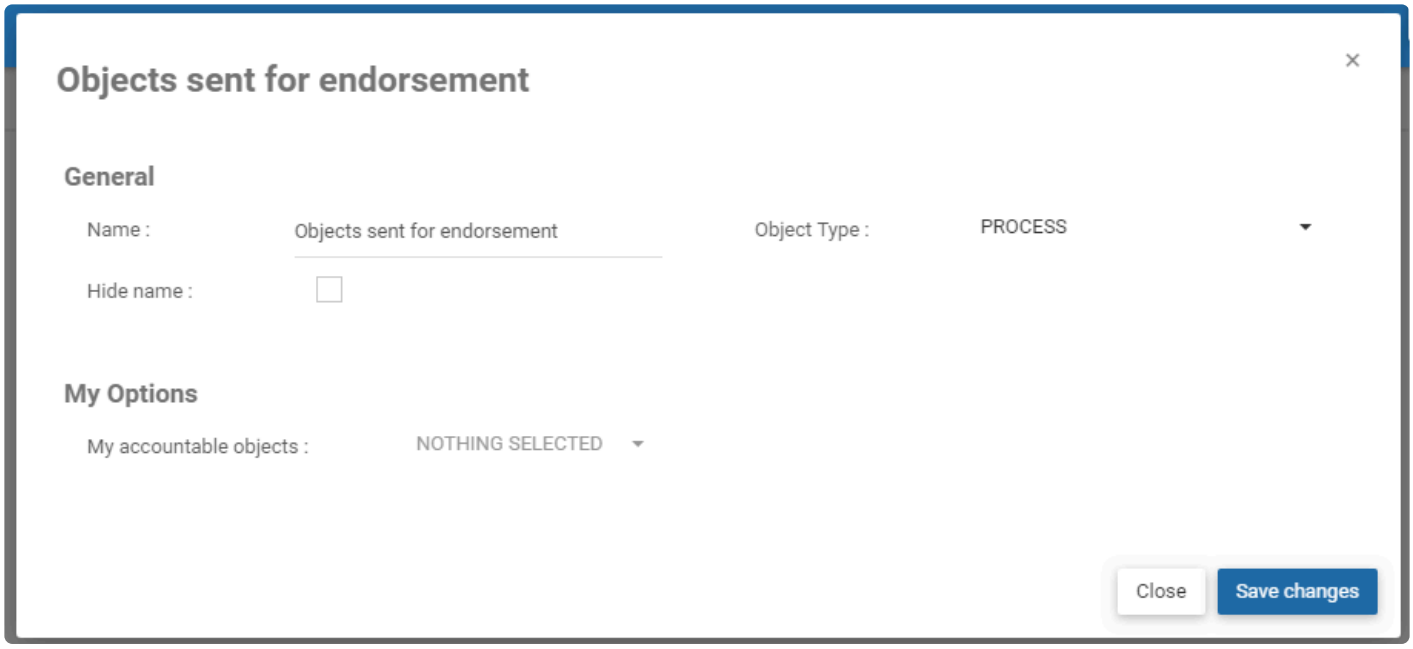
2. To add widgets to your home page, navigate to the 

button and select the widget you want to add from the Dashboard Manager.

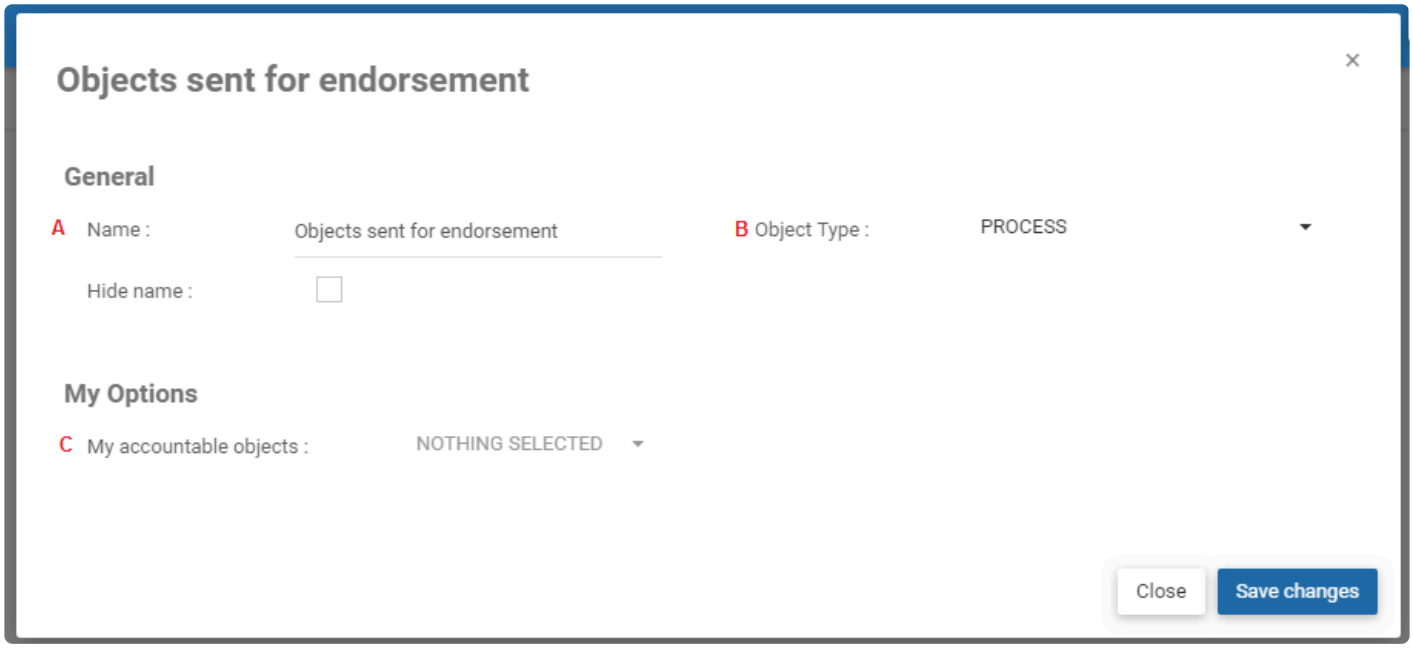
3. Once the "Object Sent for endorsement" Widget has been added to the Homepage, select the

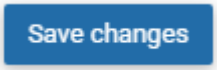
icon at the top right corner of the Widget and select the Setting button.

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



5. Users will have 3 major fields that can be edited in the “my Actions” Widget



6. After customizing the settings, click on the 

button to save the changes made.

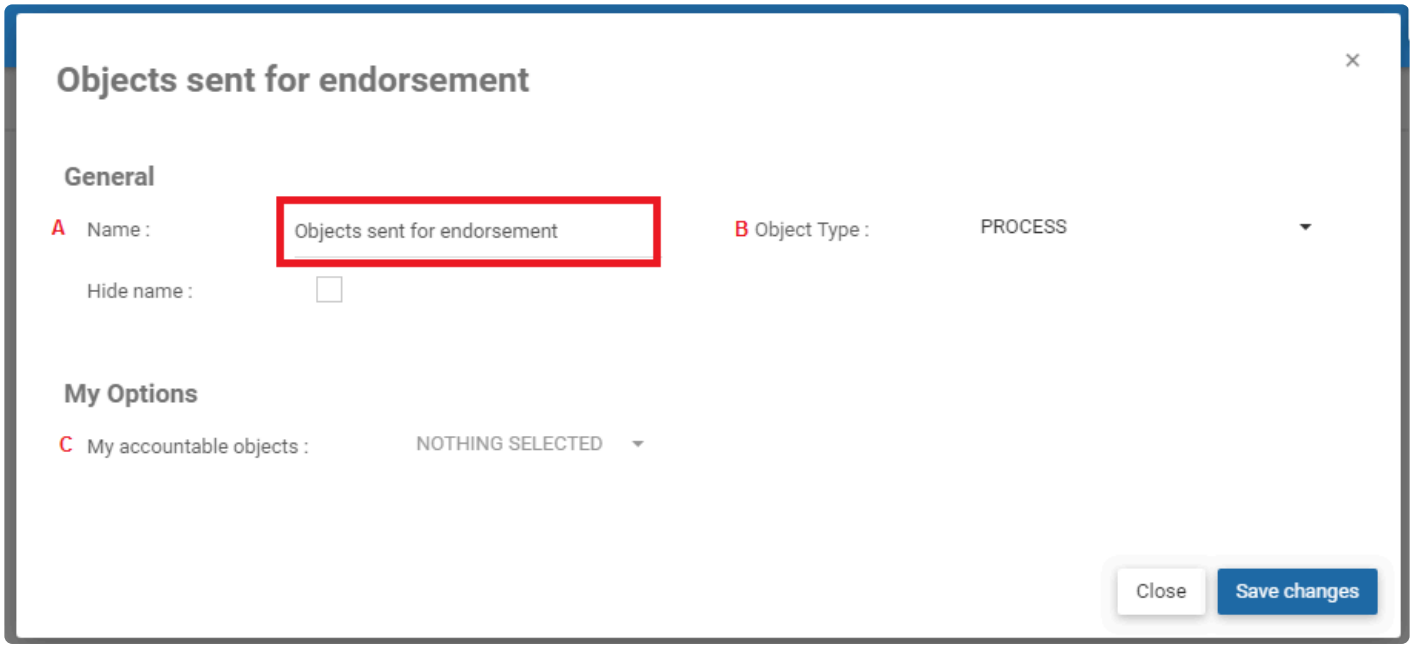
Object Sent for Endorsement Parameters

Item	Setting	Purpose
A	Name	Allow user to customize the title of Widget
B	Object Type	The primary filter of the “Object sent for endorsement”

		Allow users to select a specific object type to be featured
C	My accountable objects	Allow users to filter through their assigned Roles and Resources
D	Hide Name	Hide the name of the 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

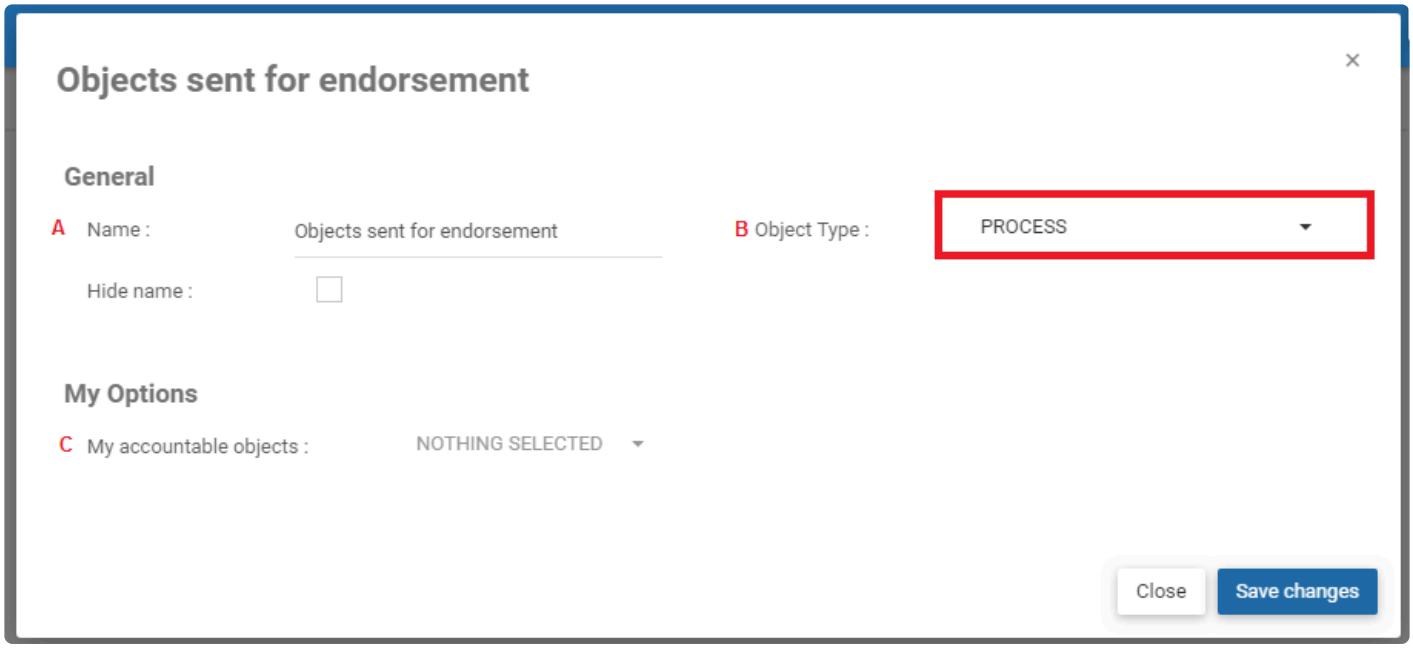
i. Navigate cursor over existing name box



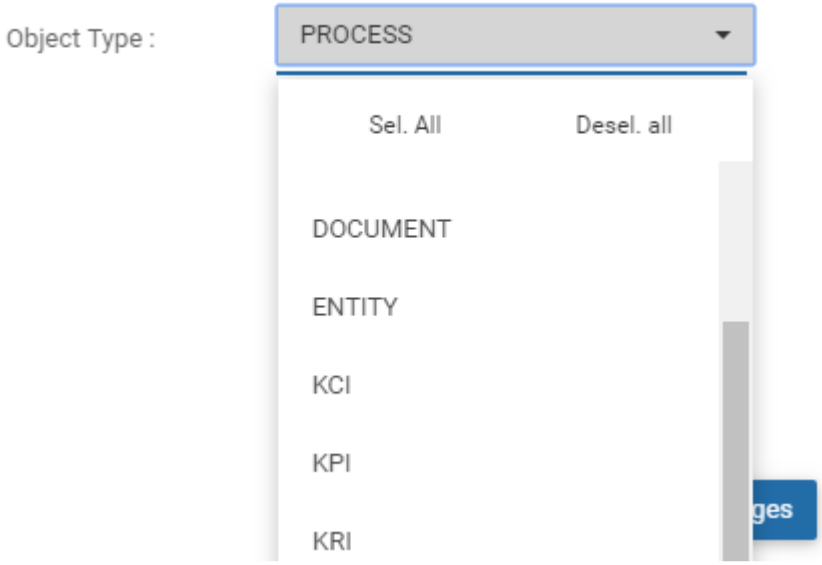
ii. Edit name by selecting name box and typing in the desired name

B **Object Type**: The object type is the primary filter of the “Object send for endorsement”. The filter is set by default for Process type. To select objects to be featured in a Widget, use the “Object Type” field and follow the instruction below:

i. Navigate cursor over the object type task bar



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



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

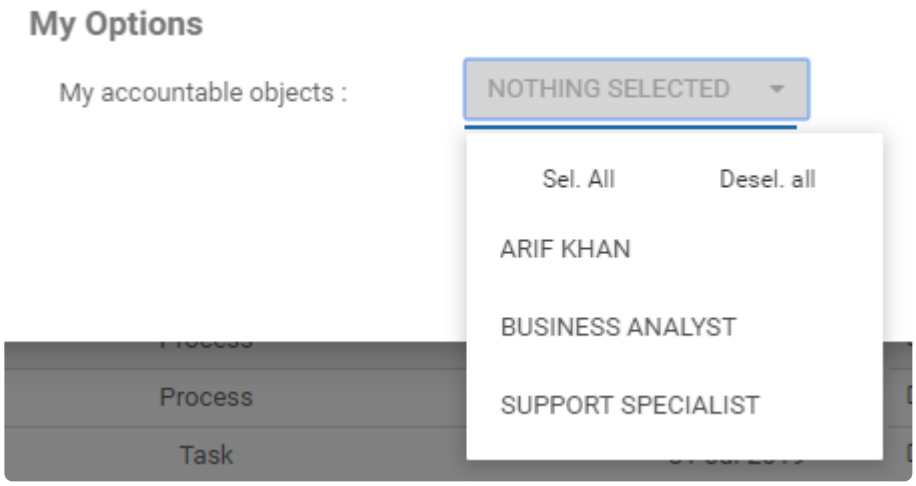
C **My accountable objects**: Role will be assigned to users by EPC Modelers. Individuals can be assigned one or multiple roles, depending on their versatility within an organization. The reason individuals are often assigned multiple roles that do not necessarily mirror their job contract is to effectively 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:

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 (Business Analyst and Support Specialist) and with his specific resource profile (Arif Khan).



4.2.1.2 Customize Widgets Content

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 the following widgets:

1. My Objects Widget
2. My Documents Widget
3. My Performance Widget
3. My Actions Widget
3. My Performance Chart Widget
3. My Post & Replies Widget
3. My Actions Pending 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.

4.2.1.2.1 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.

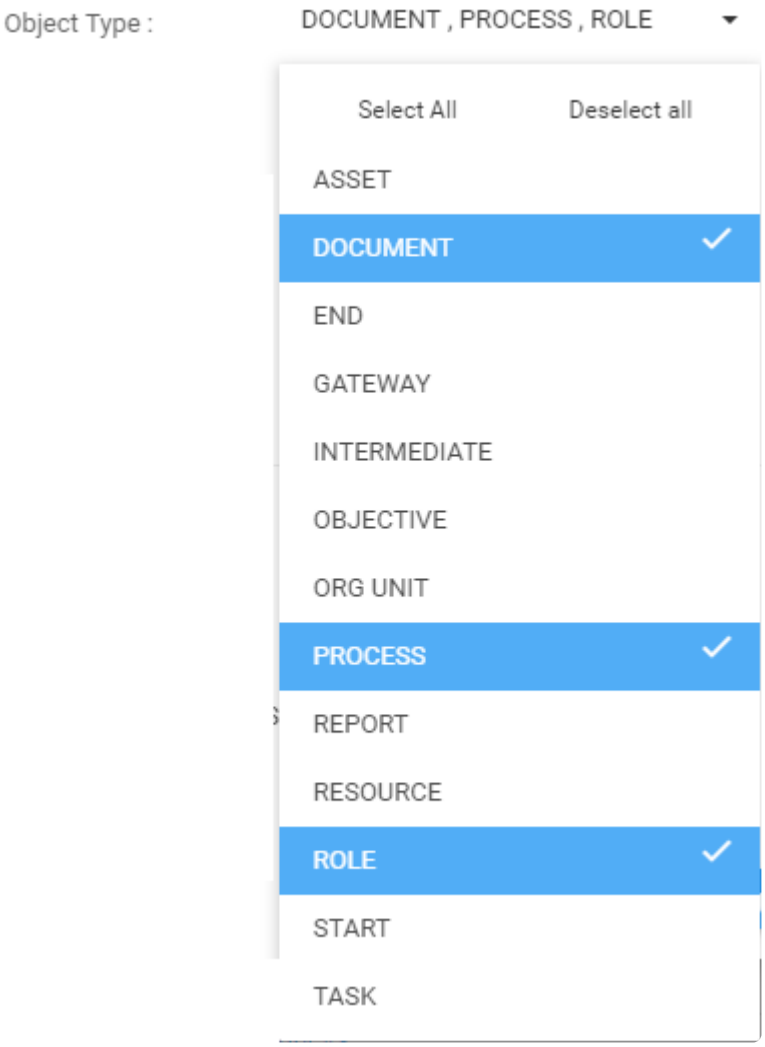
These rules are applied either with individual filters or are applied when filters are compounded with one another. The filters that are provided to users, used individually, follow OR clause rules. However when they are combined, provide additional filters, thus following AND Clause methodology.

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.



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

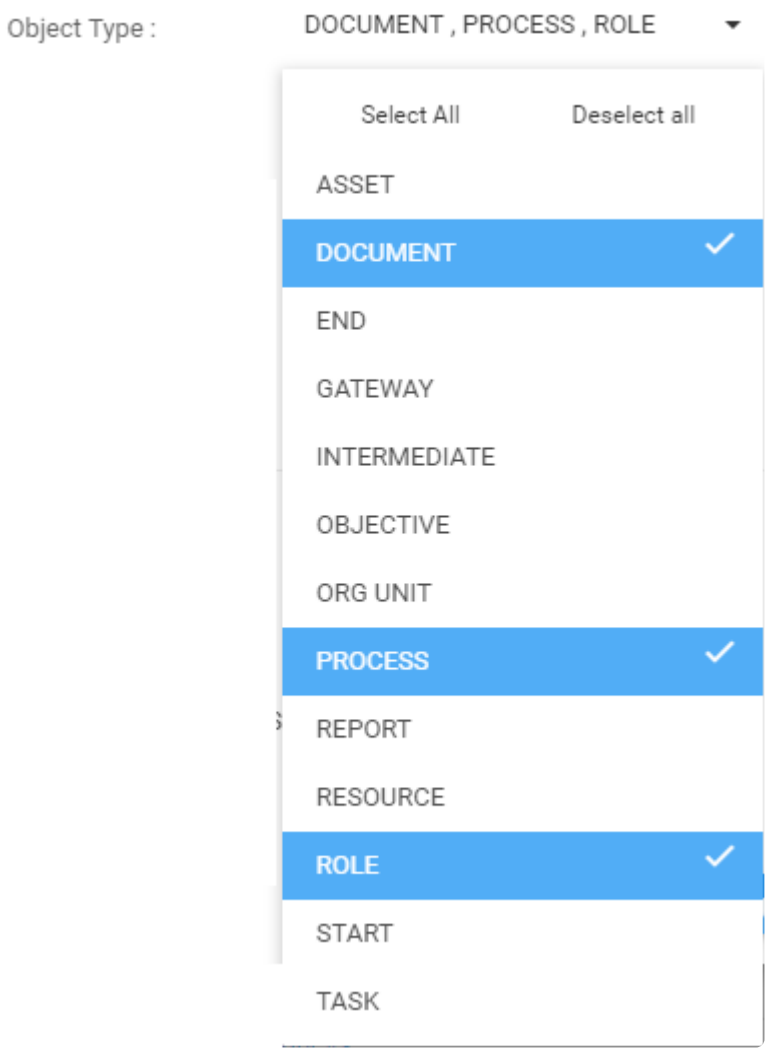
Graph	Name	Type	Last Modified
	A/P Clerk	Role	04-Apr-2017
	A/R Clerk	Role	04-Apr-2017
	Account Manager	Role	04-Apr-2017
	Accounting	Process	04-Apr-2017
	Accounting Director	Role	04-Apr-2017
	Acquisition Model #1	Document	11-Apr-2017
	Acquisition Model #2	Document	11-Apr-2017
	Acquisition Model #3	Document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



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

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

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.

4.2.1.2.8.1 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

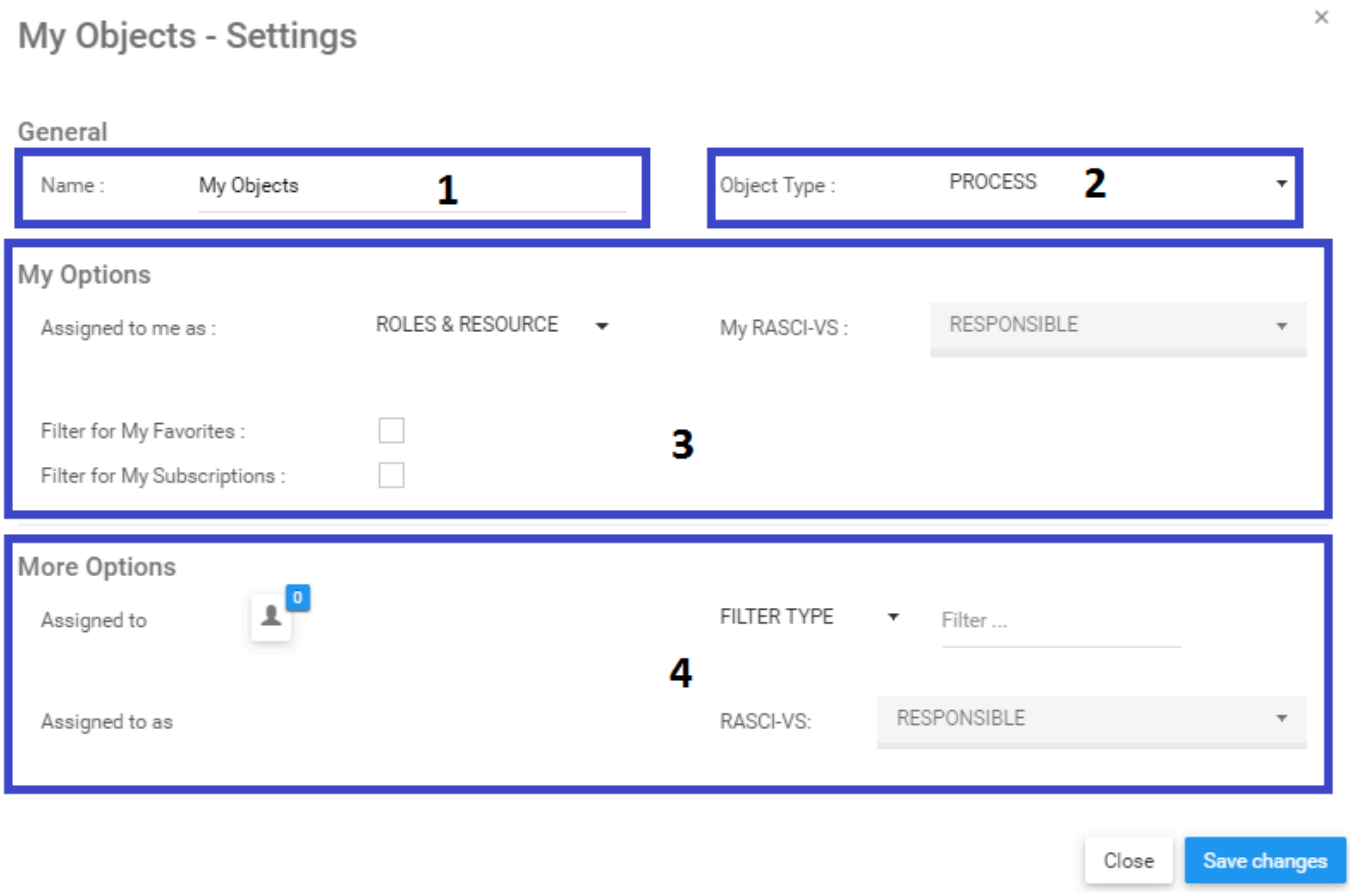
Note that the My Action Widget Filter only contains 1 Filter which follows OR clause methodology.

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 **OR 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

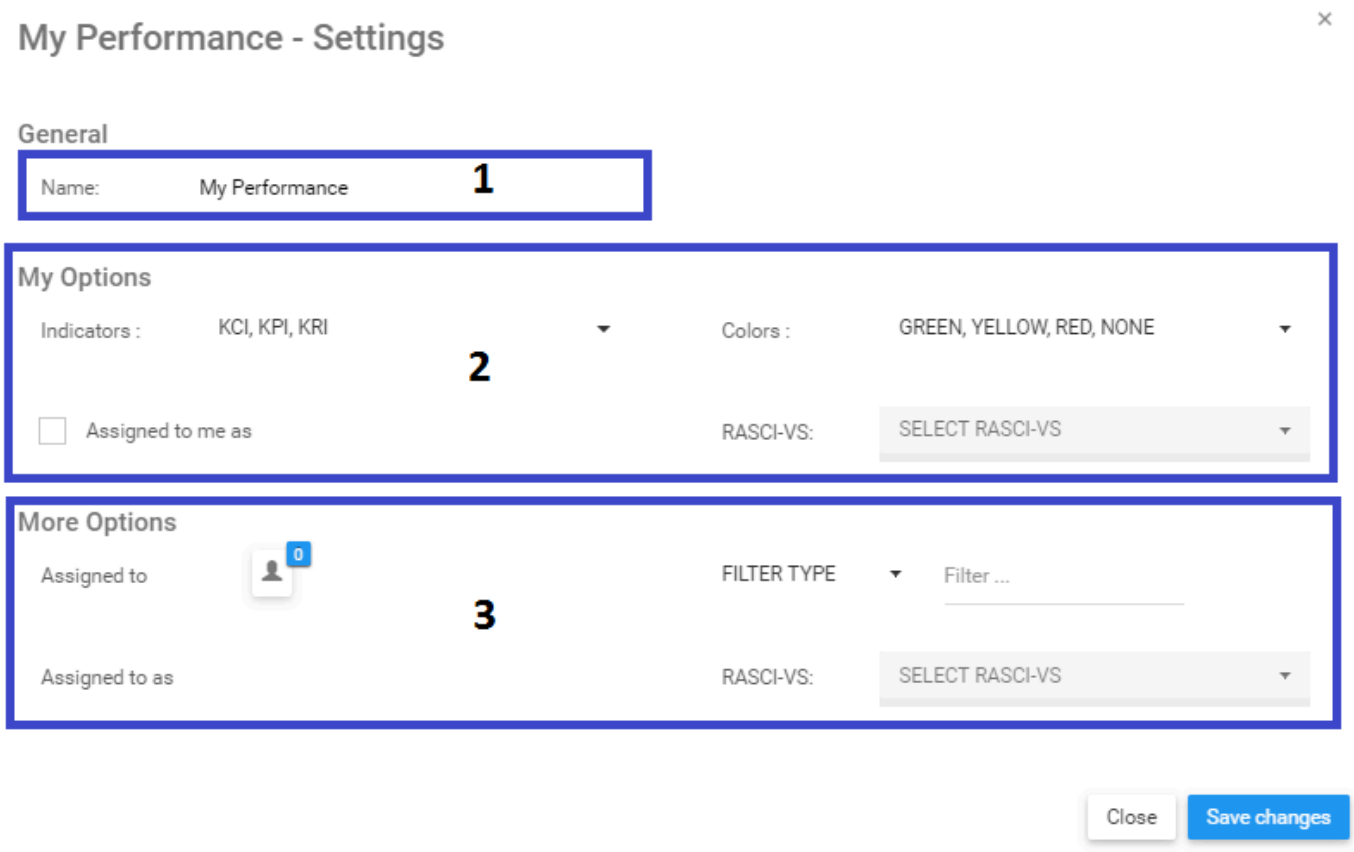
My Object Widget filters can be broken down into 4 categories.



	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.



	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.

4.2.1.3 Customize Home Page Layout

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.

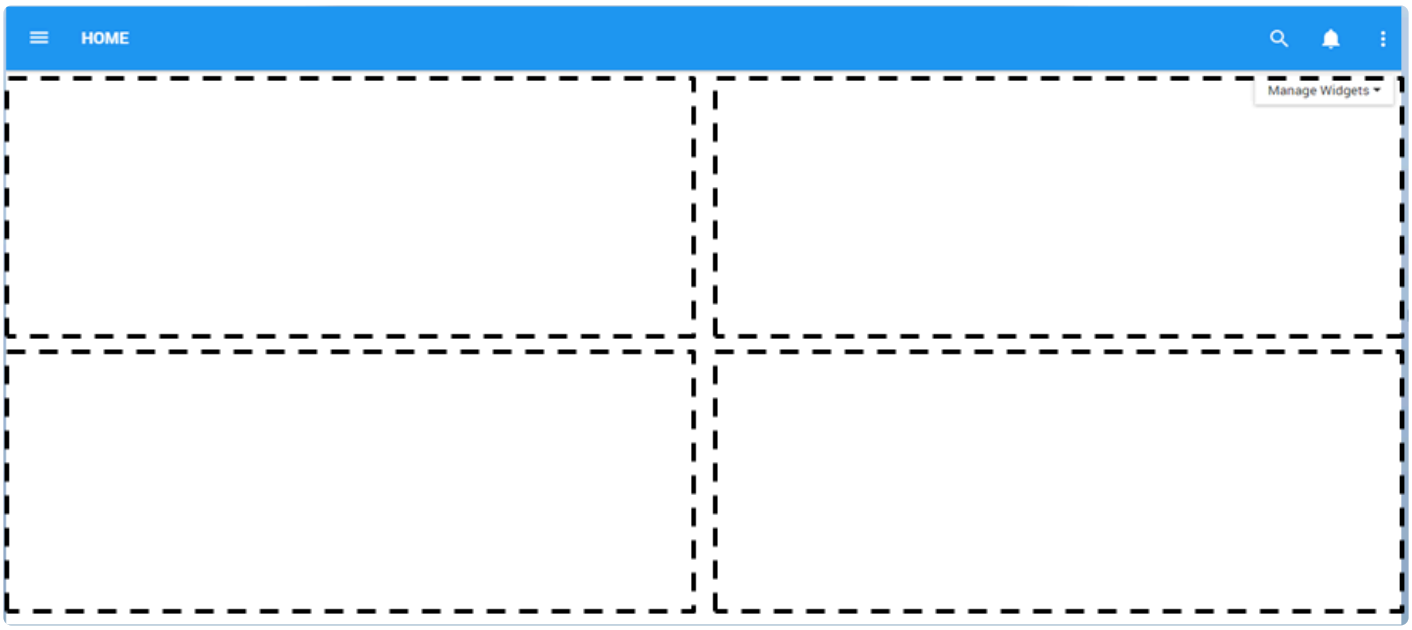
The Customize Home Page Layout section will cover the following:

1. Home Page Layout Options
2. Resize Widgets
3. Move Widgets within the Home Page
4. Remove Widgets from Home Page

4.2.1.3.1 Layout Options

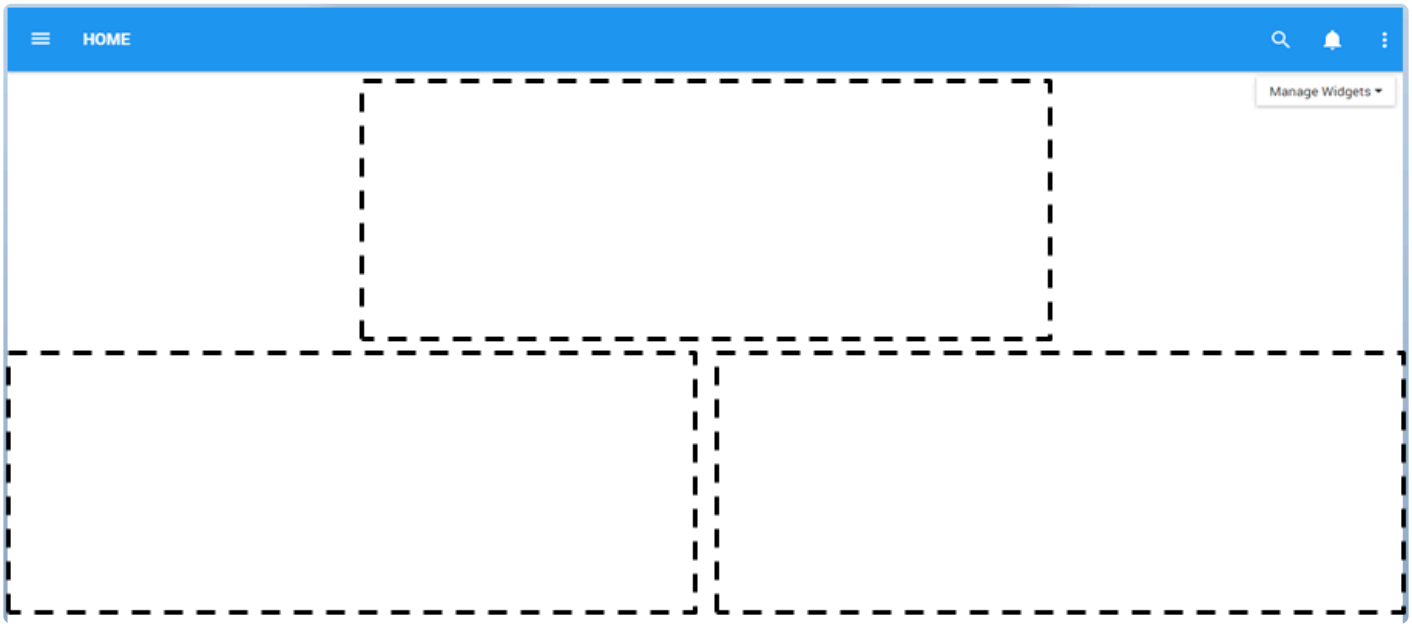
Default Widget Layout

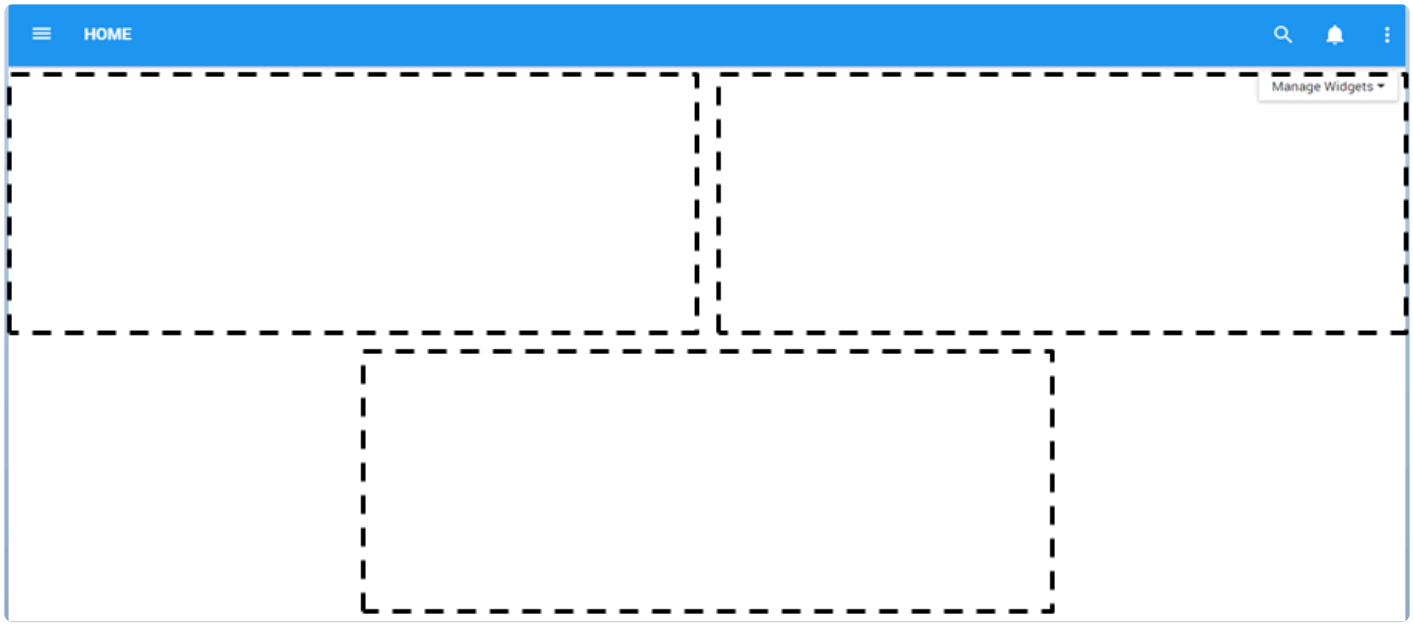
The Home page can feature up to 4 Widgets at a given time in the following layout



Centralized Widget Layout

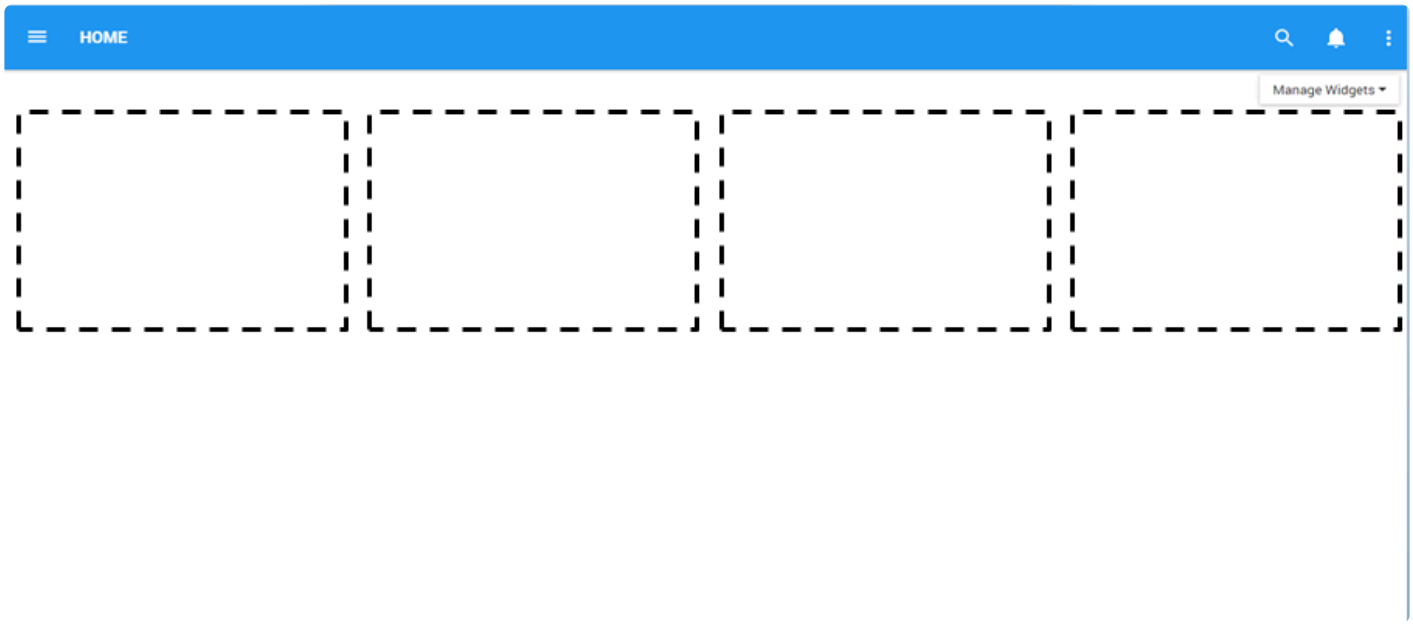
Users can center a Widget within a page. This provides a centralized view of a specific Widget, but comes at the expense of featuring additional Widgets on the page.

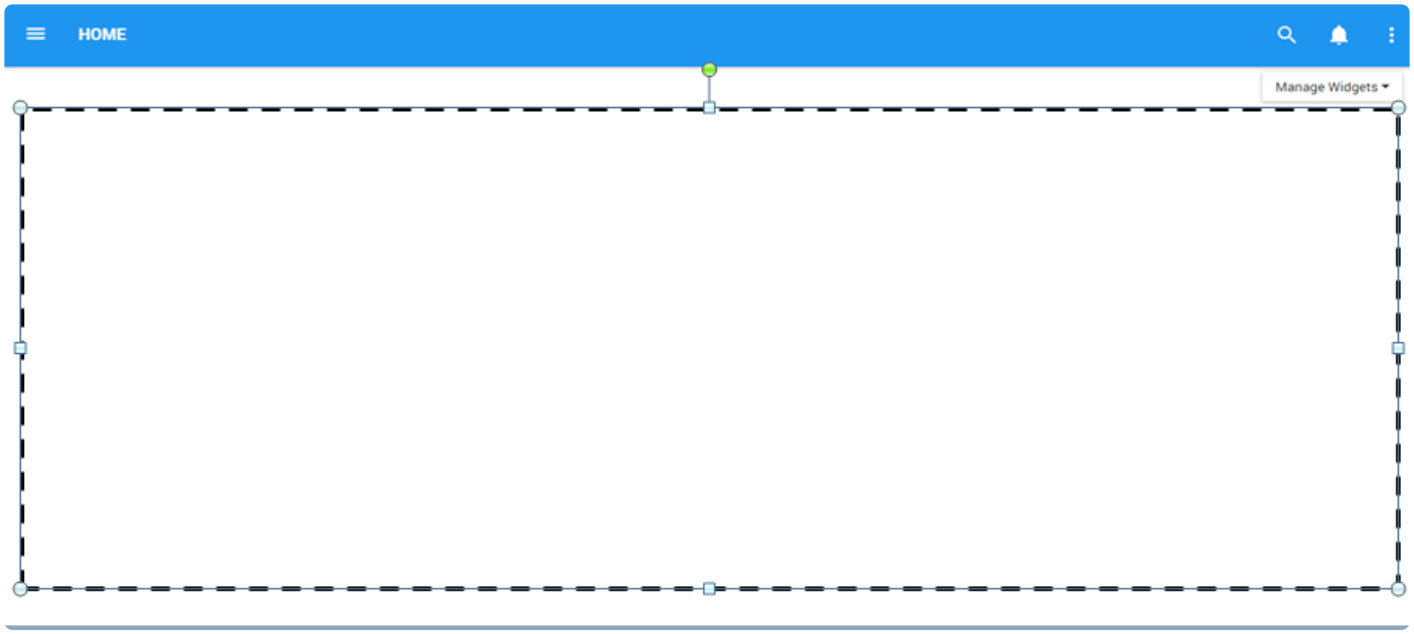




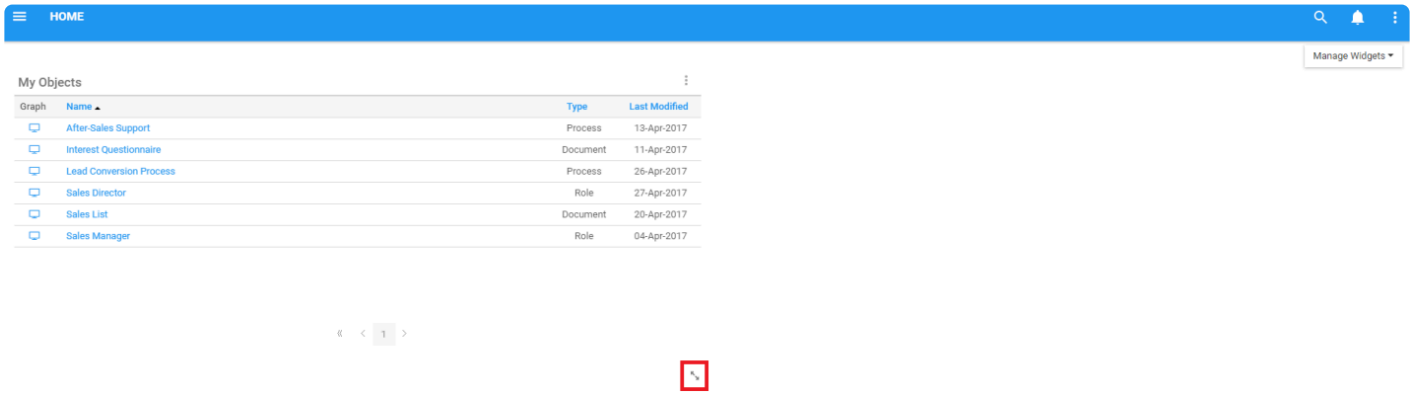
Resized Widget Layout

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.





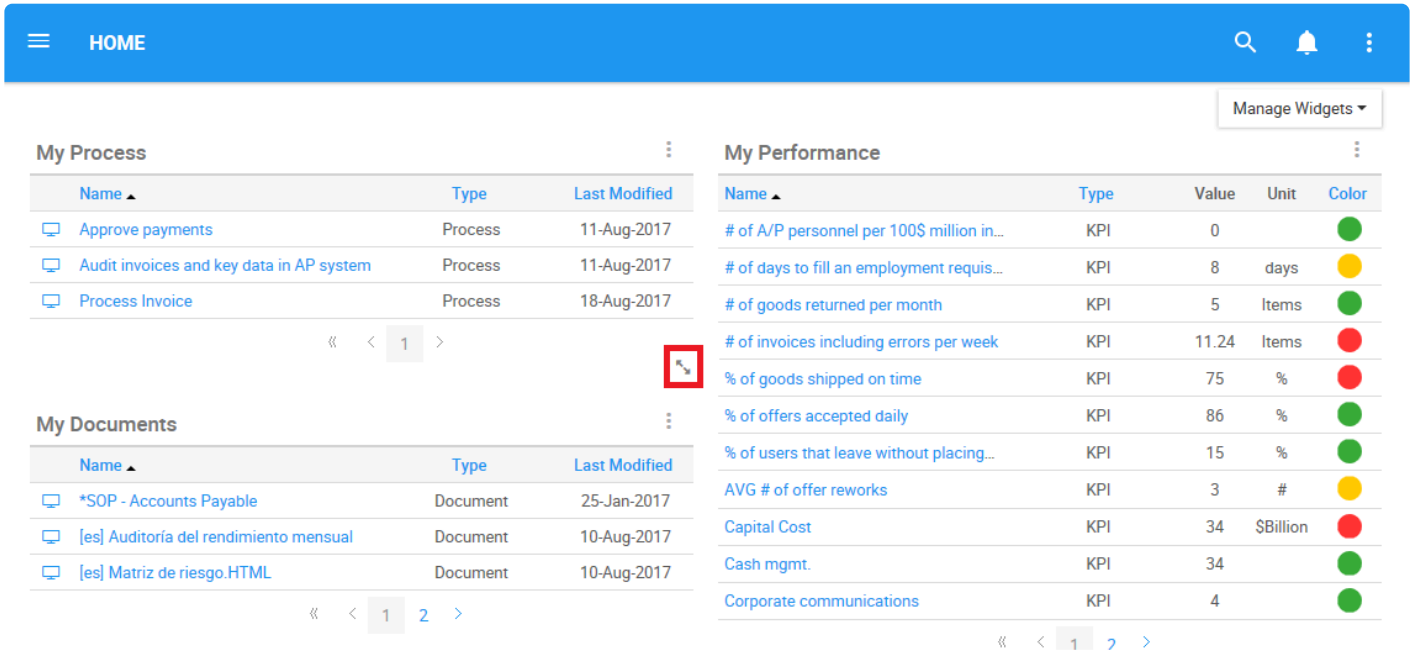
Users can Resize Widgets by using the icon located at the bottom right corner of the Widget. Simply click on the icon and drag the window diagonally until the desired size is reached.



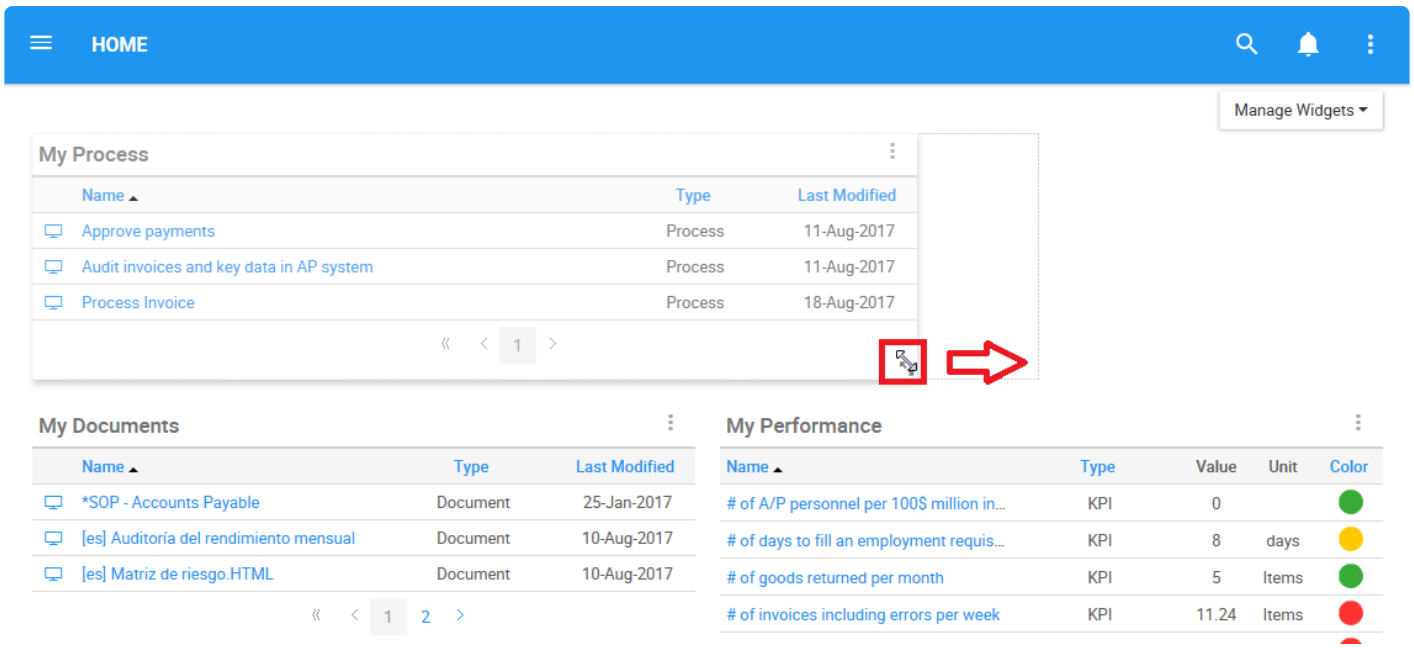
4.2.1.3.2 Resize Widgets

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

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



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



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

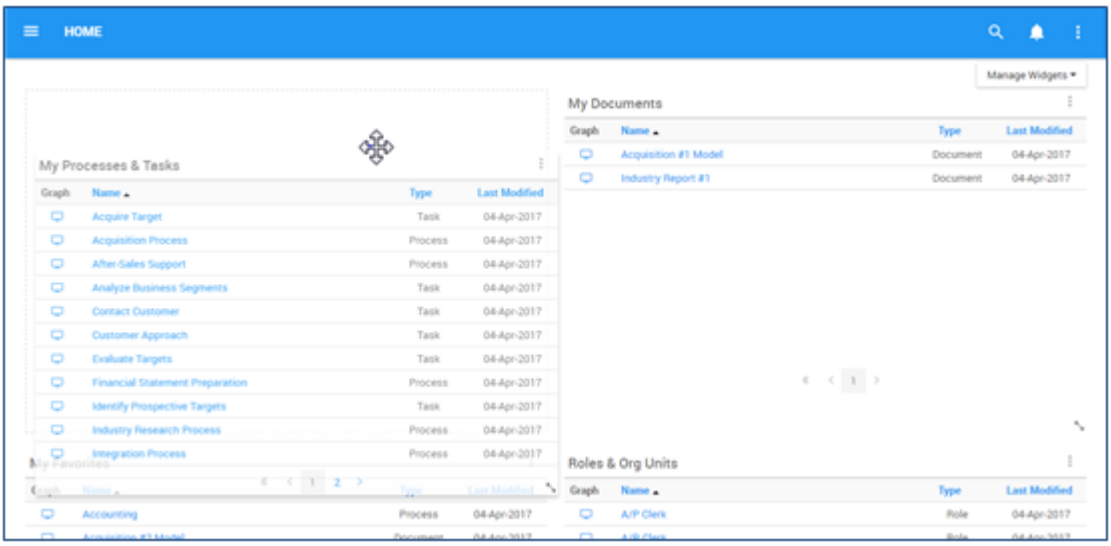
> **Mobile**: Mobile layout will depend on the screen size on the smartphone or tablet being used. Users will be provided with a fixed layout, based on their mobile device that maximizes the use of the available screen space. This layout will be fixed.

4.2.1.3.3 Move Widgets within a Home Page

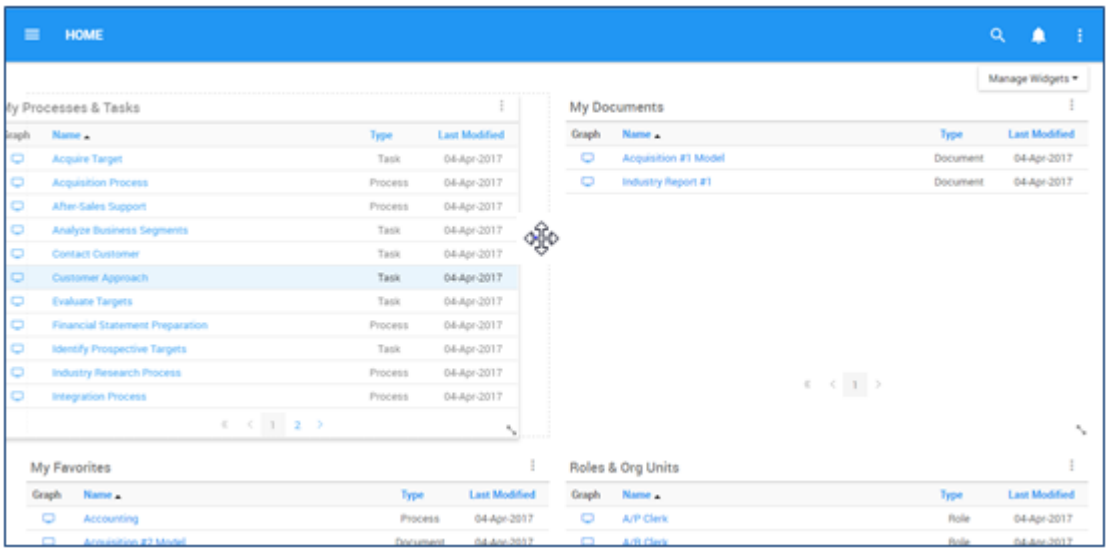
Widgets featured on a Home page can be relocated based on user preference of need. Please see the instructions below for full details on Widget relocation

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

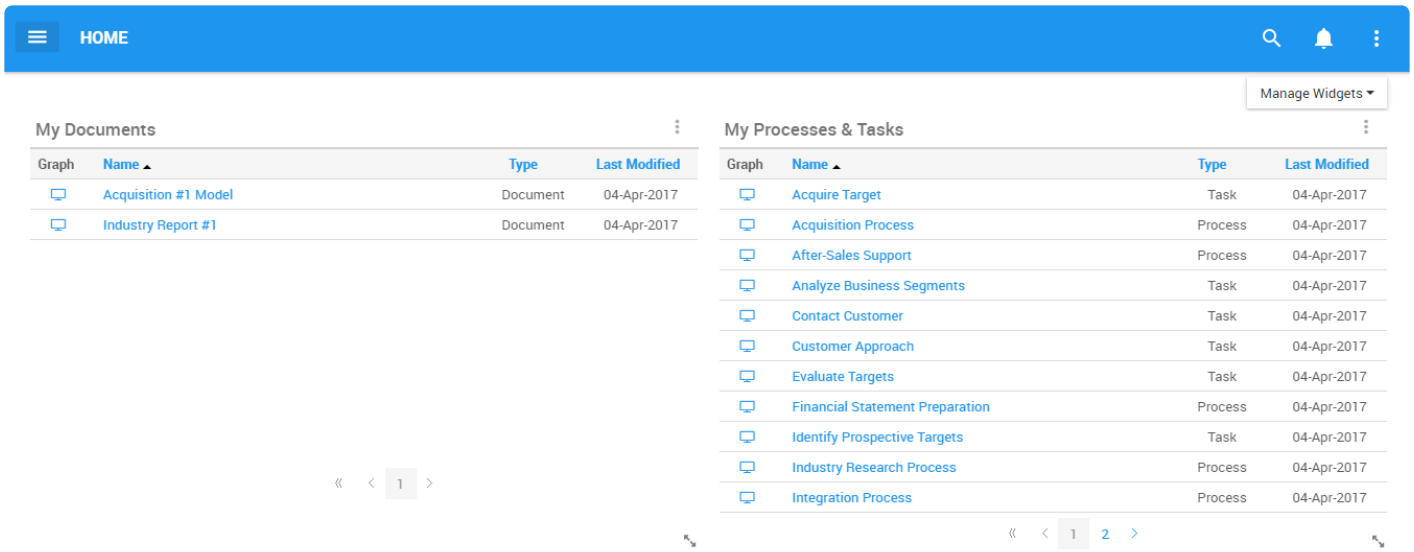
Case A



Case B



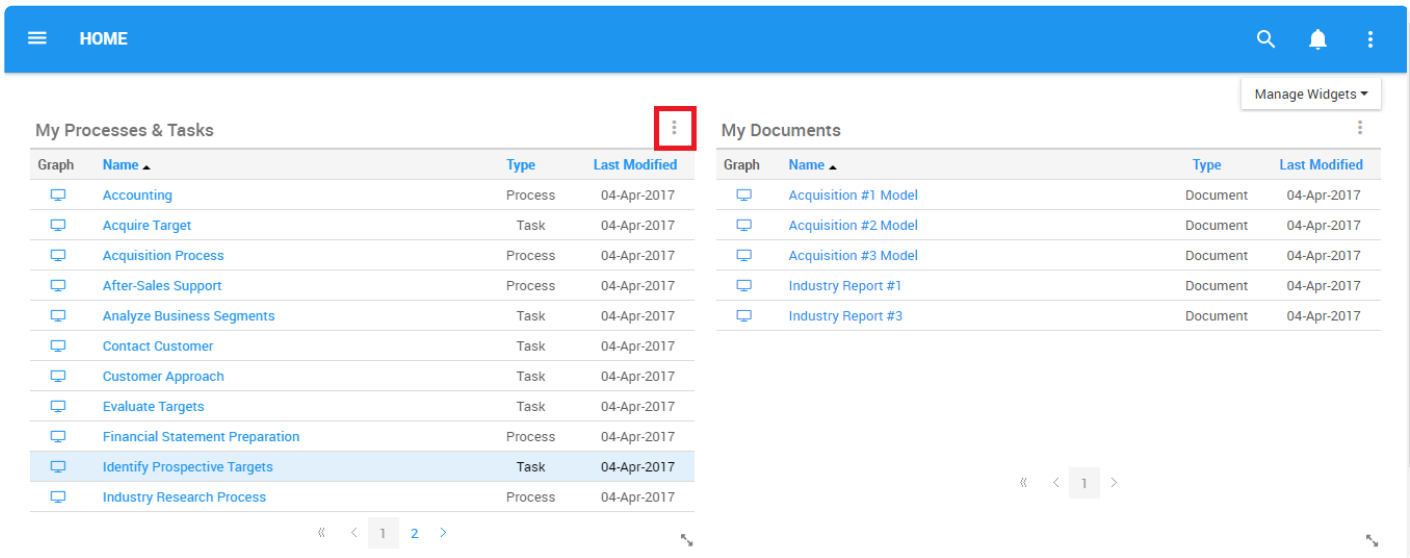
2. Select the Widget and relocate it to the desired section of the page. This can be any outlined Widget section within a page. If the desired section is currently occupied by a Widget, the Widgets will exchange places once the function is performed.



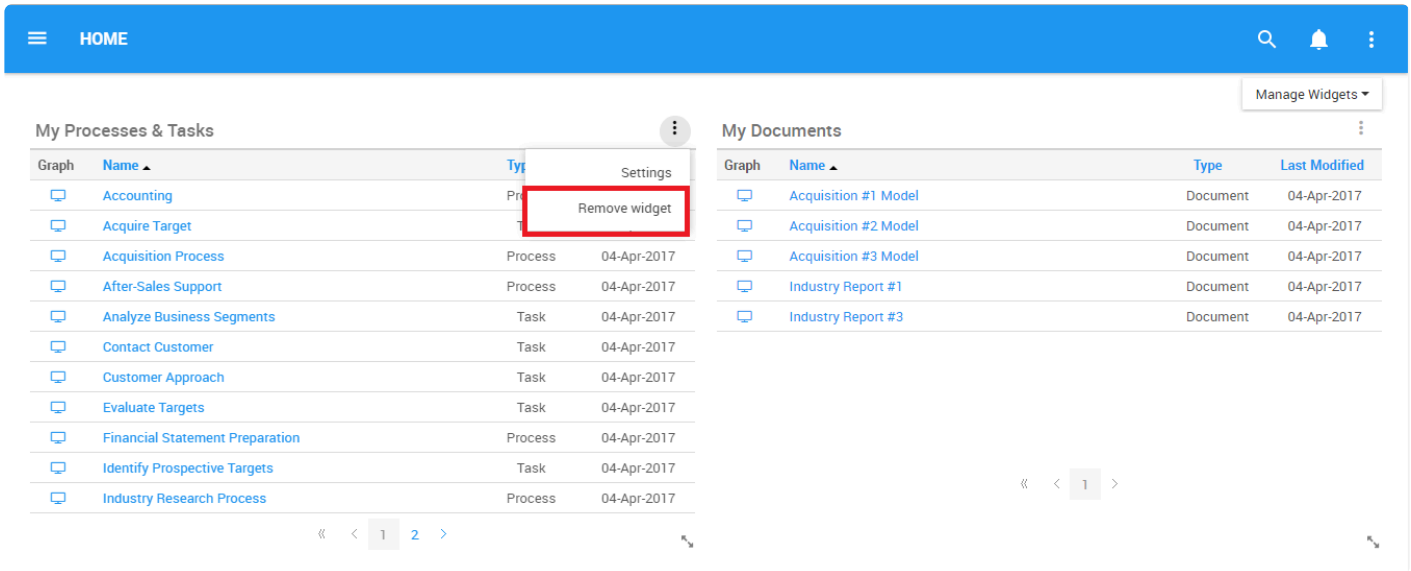
4.2.1.3.4 Remove Widgets from Home Page

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

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



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



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

4.2.1.4 Customize Home Page Tabs

Customizing Home Tabs

EPC's home page is fairly customizable as it has many tabs and widgets to help users organize their tasks, prioritize and build their own dashboard. This additional editing feature will cover many areas such as adding removing and renaming tabs, re-ordering tabs for a priority and ease-of-use and finally, user will be capable of setting permission on users and groups who will have access to the given tabs. The scale of use has been widened to allow better management and team organization.

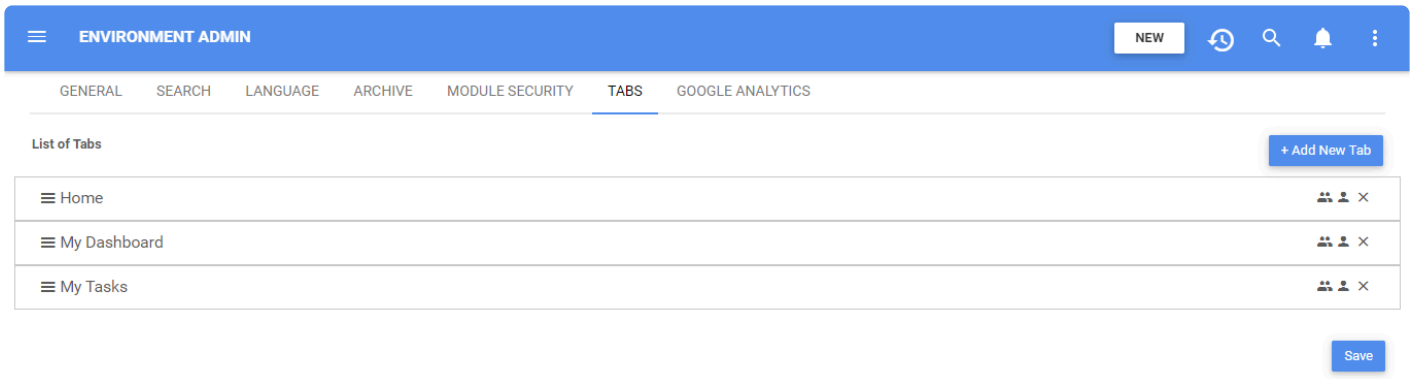
1. Adding, Removing and Re-naming Tabs
2. Re-ordering Tabs
3. Permission on Tabs

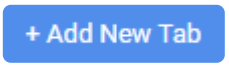
4.2.1.4.1 Adding, Removing and Re-naming Tabs

These functions are available for system and environment administrators to operate. There are three default tabs to all new environments such as “Home”, “My Dashboard” and “My Tasks”. These can be removed or adapted to any individual’s liking.

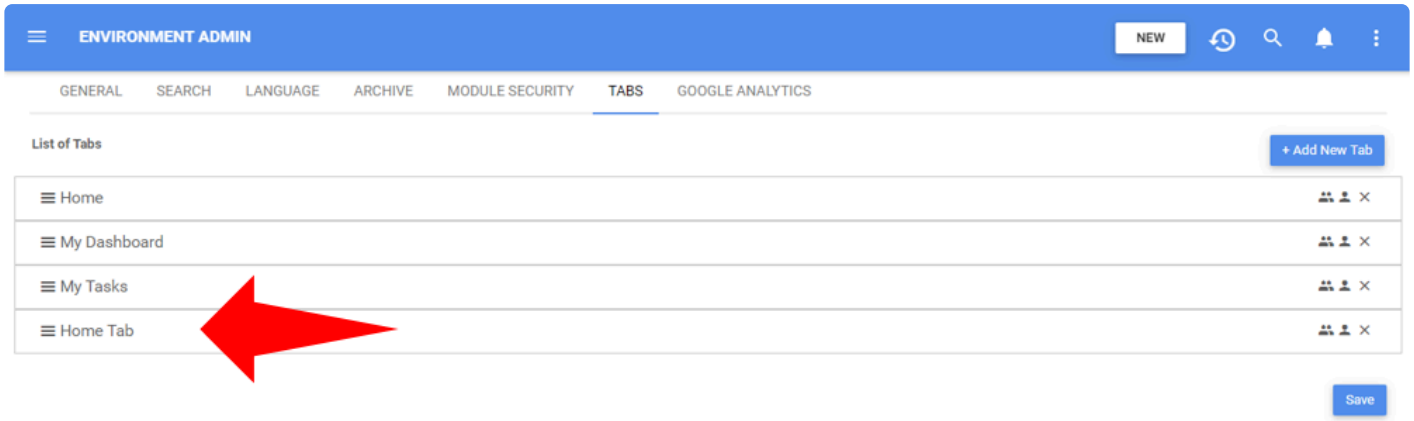
How this function works:

1. Navigate to the Environment Admin. Page and click on the “Tabs” column



2.Click on the 

button and a new “Home Tab” selection will appear



3. Type a name for your new tab e.g. My Product (maximum 200 characters) and click save

4. To remove a tab, click on the “x” icon on the and click save.

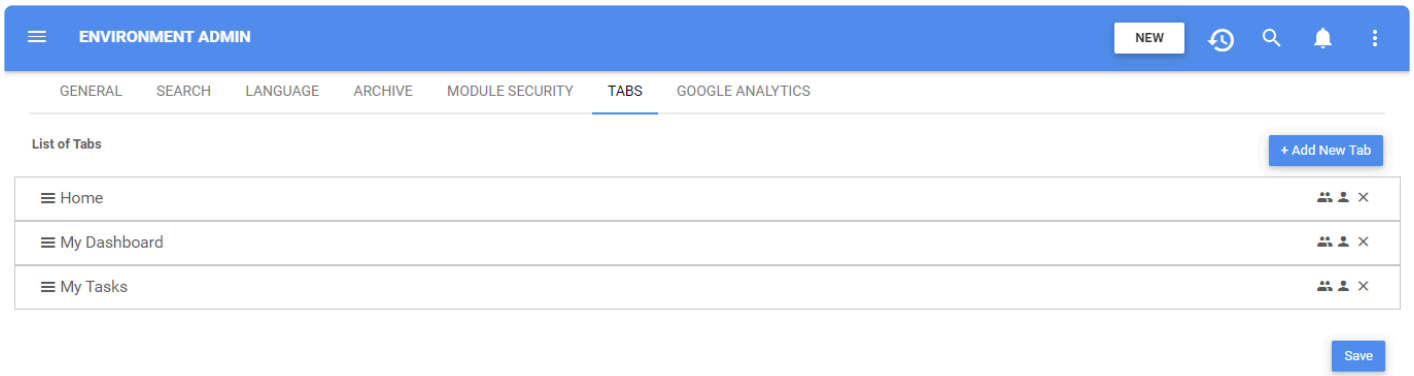
5. To rename a tab, click on the title, edit it and save.

4.2.1.4.2 Re-ordering Tabs

This function is fairly simple as it allows user to set their organization of tabs in a favorable order.

How this function works:

1. Navigate to the Environment Admin. Page and click on the “Tabs” column



2. Select the tab you would like to reorder by the ≡ icon and drag it to the desired position.

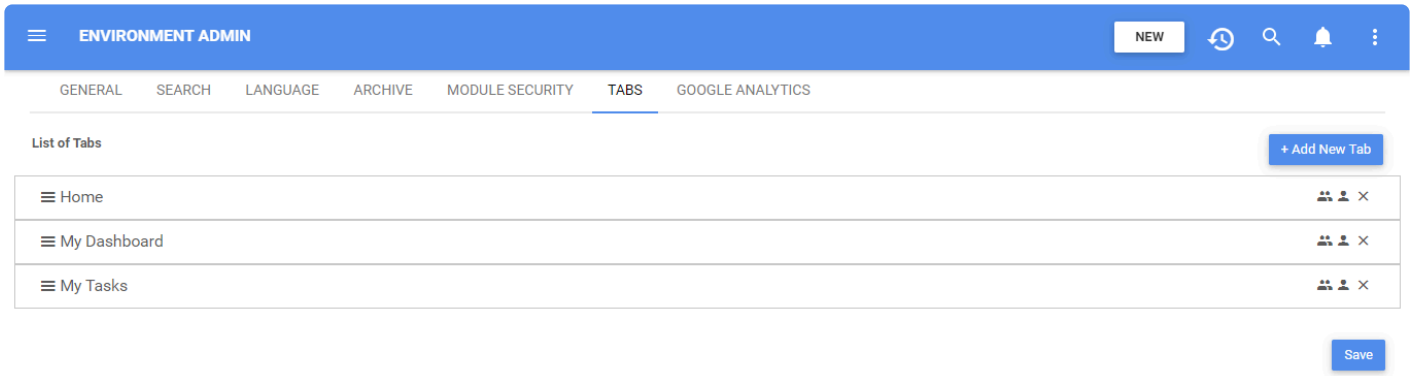
3. Click save.

4.2.1.4.3 Permission on Tabs

The permission function is the most advanced setting for tabs which will allow individuals and/or teams to privatize and centralize their tab information in a single location. By default, all new created tabs have the “everyone” group already assigned and given view permission until permission is edited. The view on permission is only visible once a user logs off and relogs into their account.

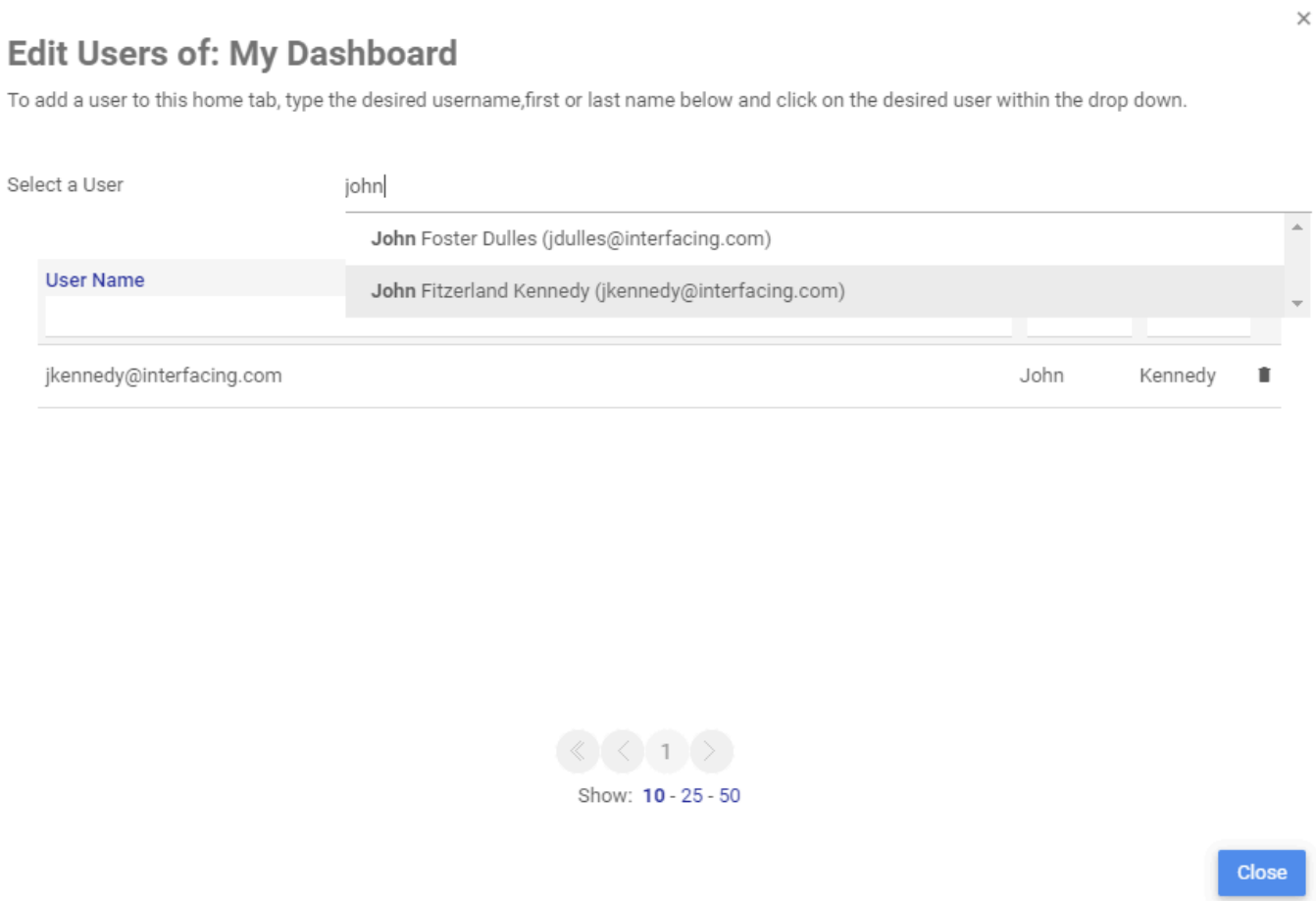
How this function works:

1. Navigate to the Environment Admin. Page and click on the “Tabs” column



2. Select the group or user icon for the desired tab for which a “Edit Users of: [Tab Name]” pop-up will appear.

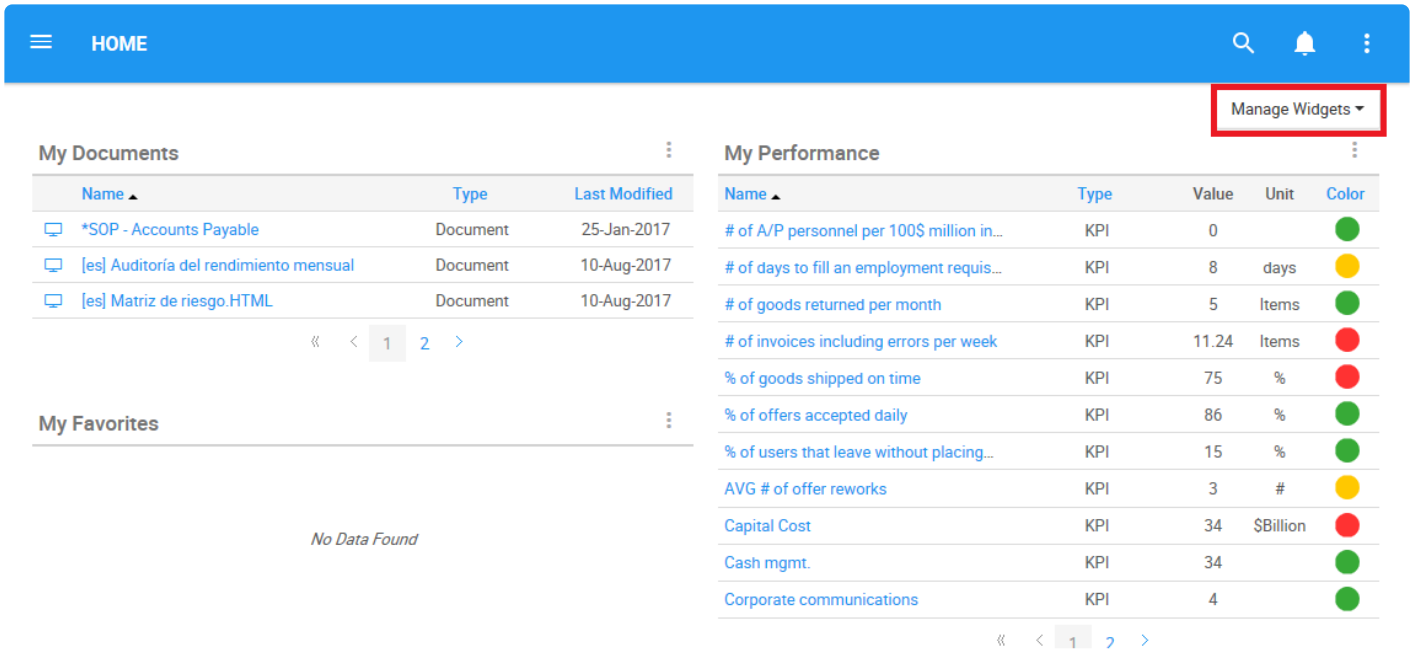
3. Type the name of the user or groups in the “Select a user/group” section to add them to the list of authorized users and close the window.


Edit Users of: My Dashboard
To add a user to this home tab, type the desired username,first or last name below and click on the desired user within the drop down.
Select a User
john
John Foster Dulles (jdulles@interfacing.com)
John Fitzerland Kennedy (jkennedy@interfacing.com)
User Name
jkennedy@interfacing.com
John
Kennedy
1
Show: 10 - 25 - 50
Close

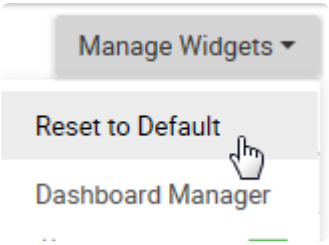
4.2.1.5 Reset to Default Widgets

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

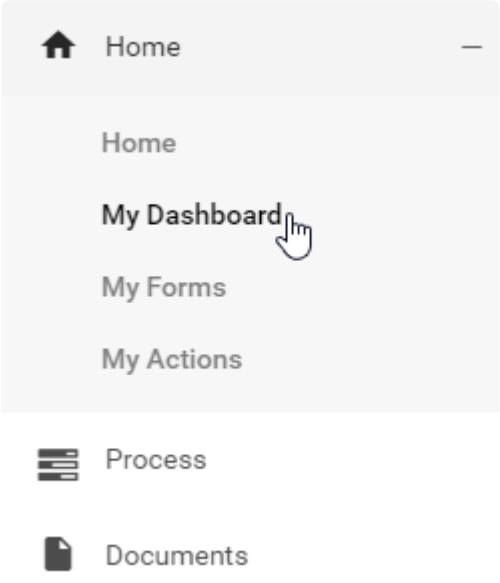


3. Select the “Reset to Default” button. The page will automatically refresh and the default Widgets will be reset on Home page.

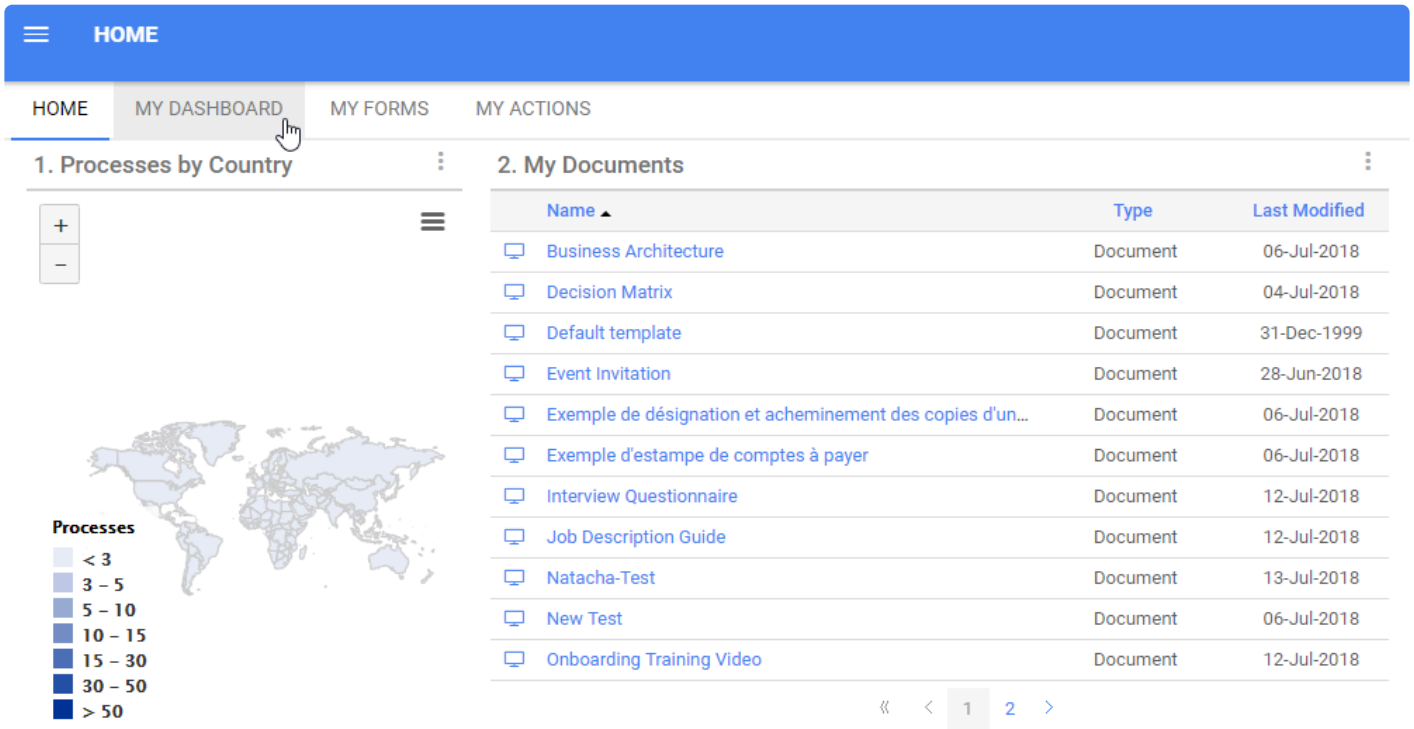
4.2.2 My Dashboards

The My Dashboards page is very similar to the Home page. It facilitates the organization of dashboards by letting users prioritize which of their widgets are needed on their home page, without having to remove the ones less needed.

The My Dashboard page can be accessed either from the tree on the left :

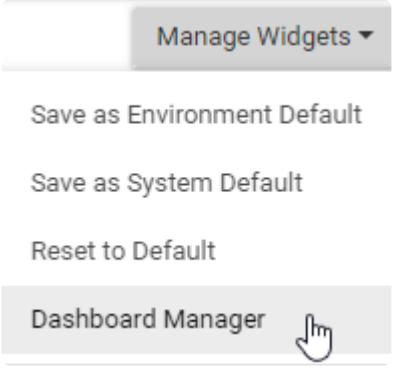


or by clicking on the tab if you are directly on the Home page:



When you access the page, it will be empty. You can add widgets by clicking on the Manage Widget button,

and by selecting Dashboard Manager.

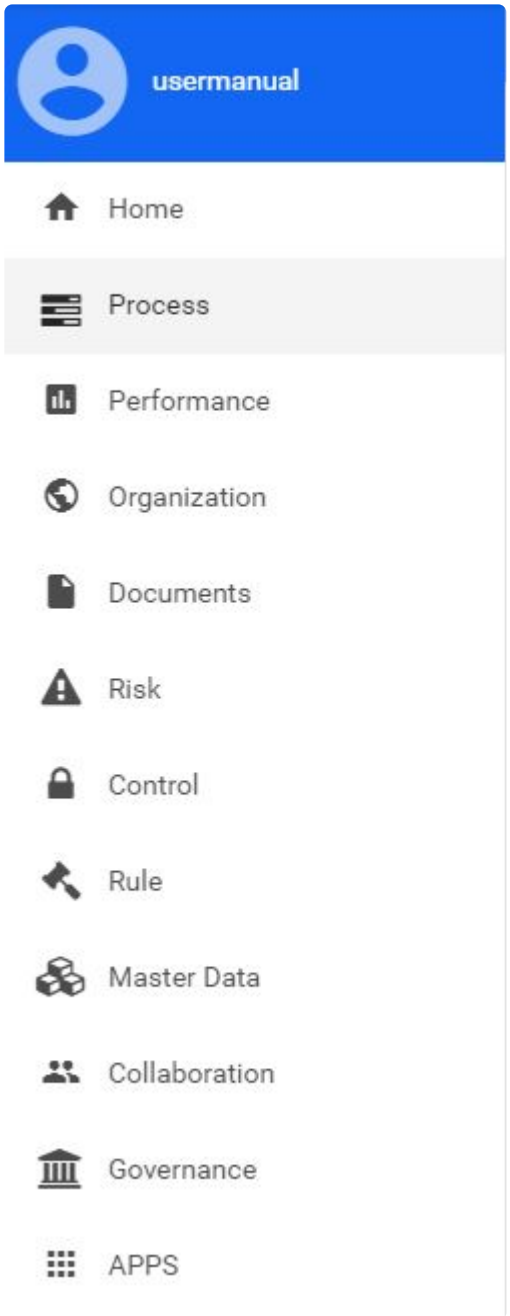


You can then follow the steps explained more in detail in the page Add Widgets to Home Page, since they are the same for the My Dashboard Page.

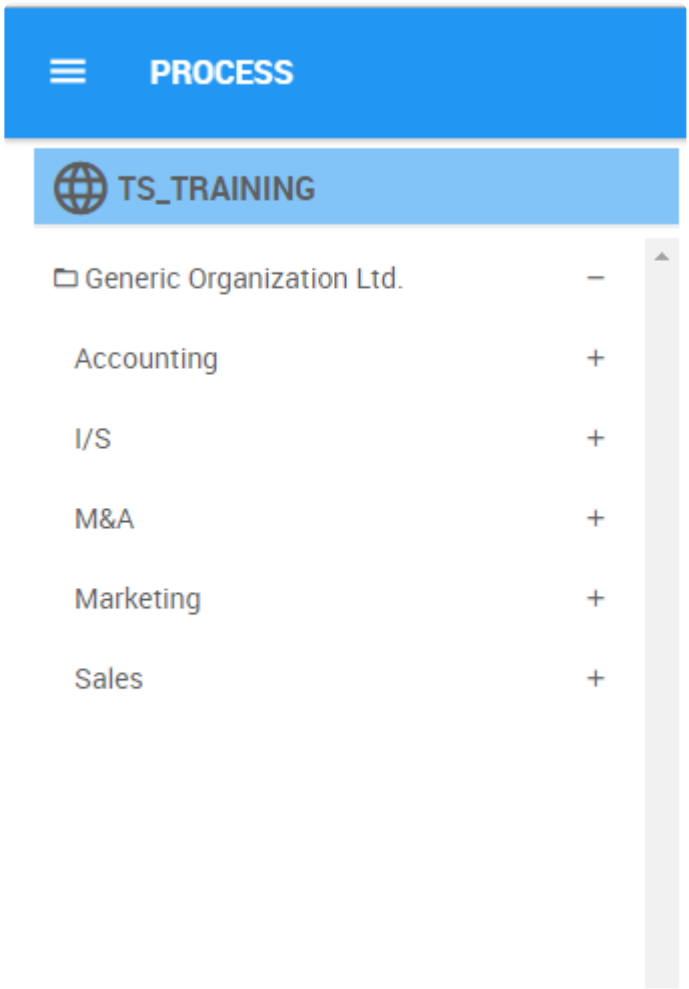
4.3 General Navigation

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



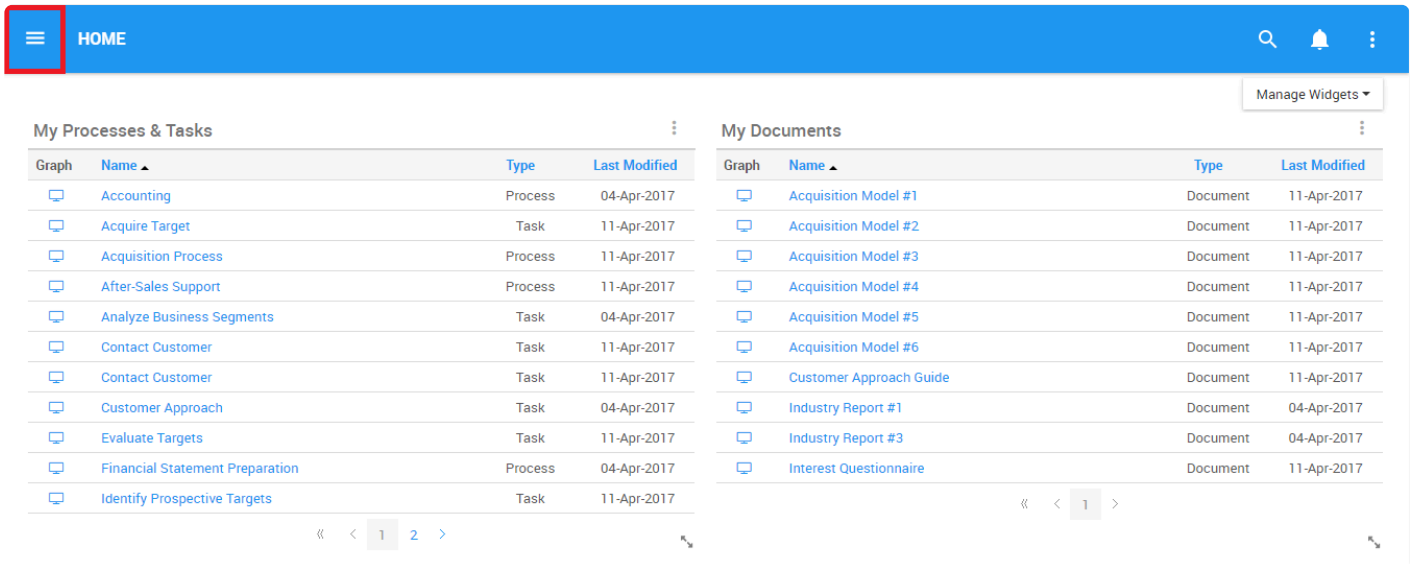
Both Items within the EPC follow a hierarchy format, allowing users to easily navigate between components of the EPC.

4.3.1 Navigation between Modules

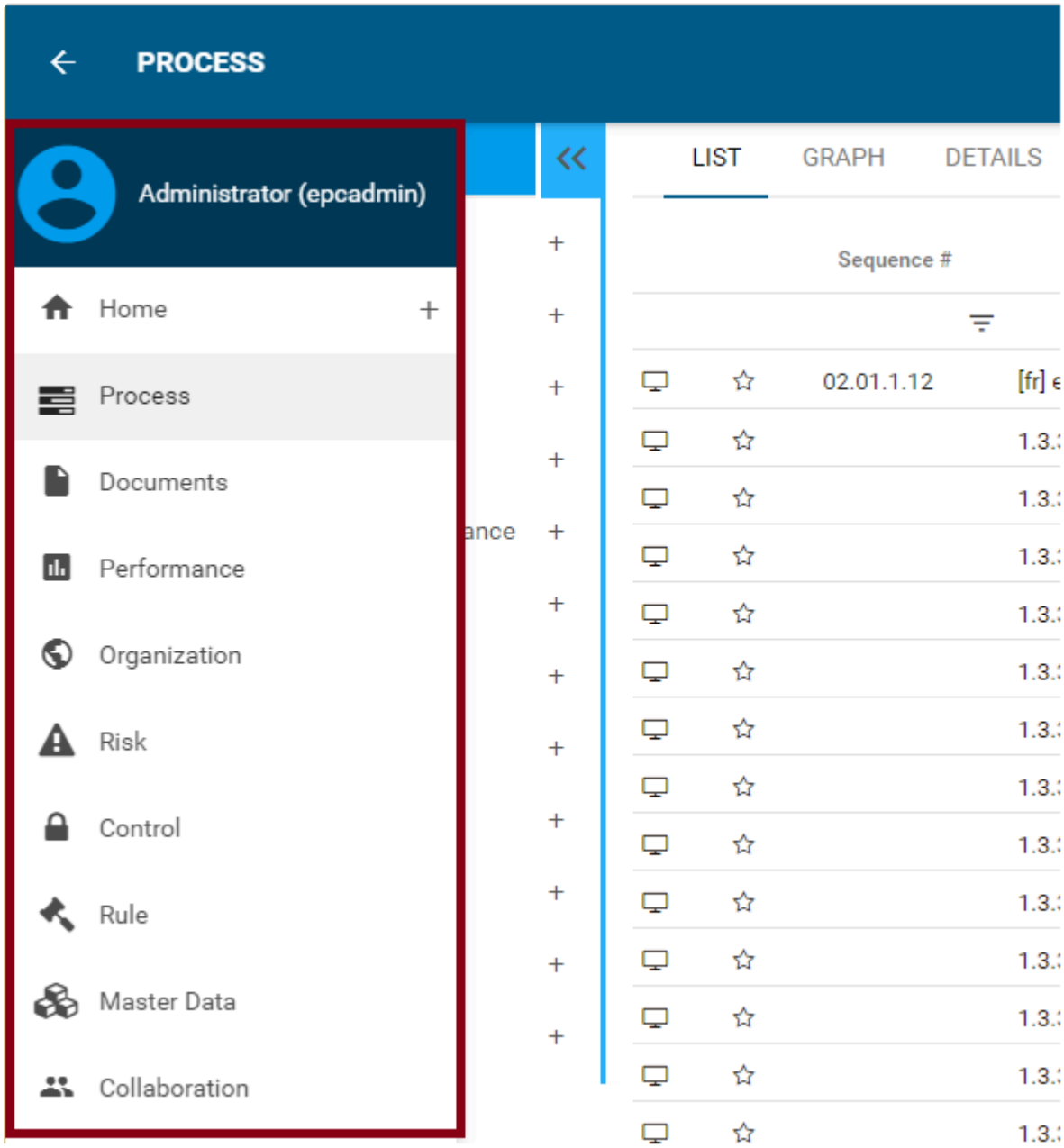
The Navigation Menu allows users to quickly navigate between EPC Modules.

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

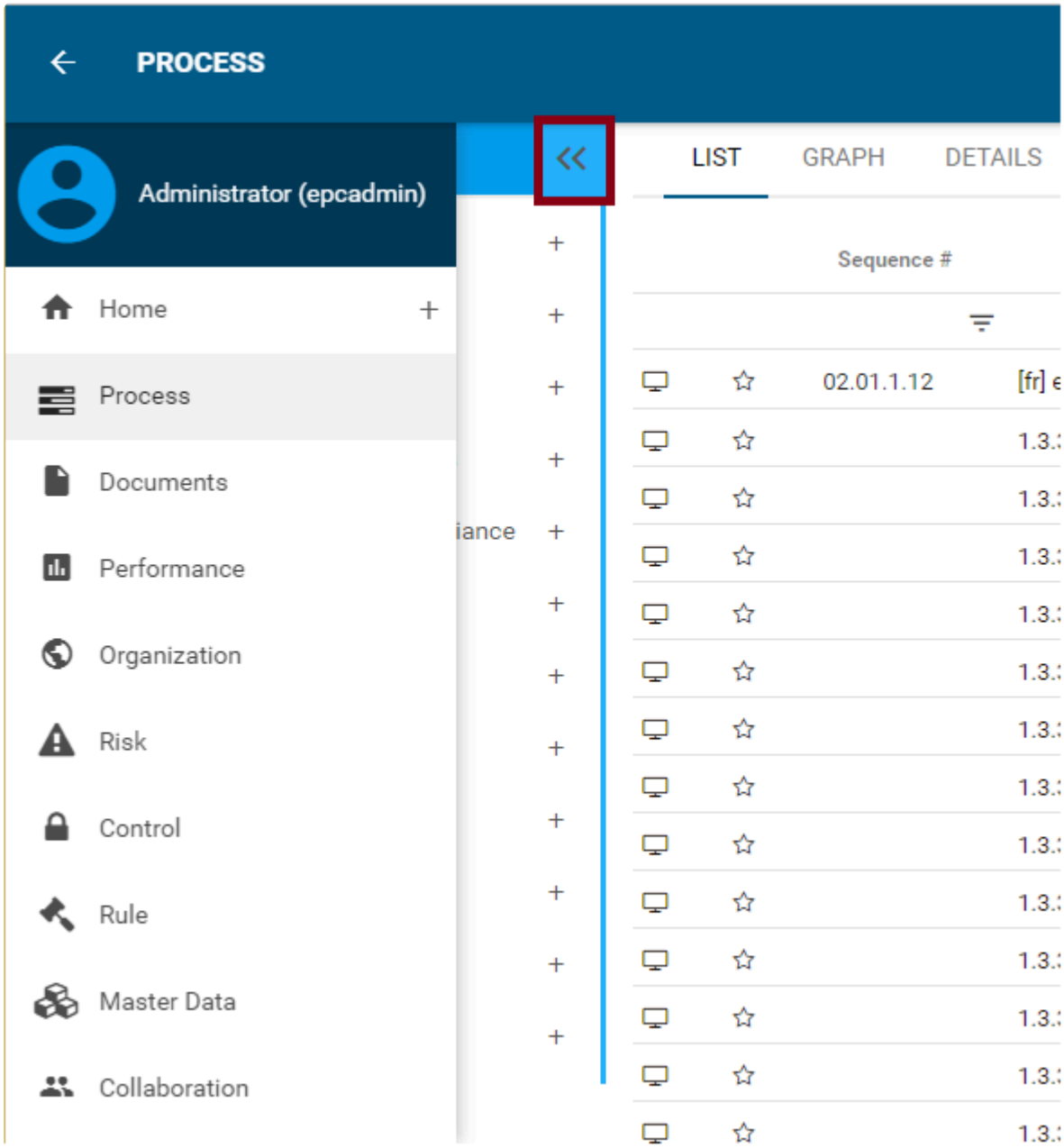
1. Click on the **Navigation Menu Button** on the top left of your screen



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


PROCESS
Administrator (epcadmin)
Home
Process
Documents
Performance
Organization
Risk
Control
Rule
Master Data
Collaboration
LIST
GRAPH
DETAILS
Sequence #
02.01.1.12
[fr] e

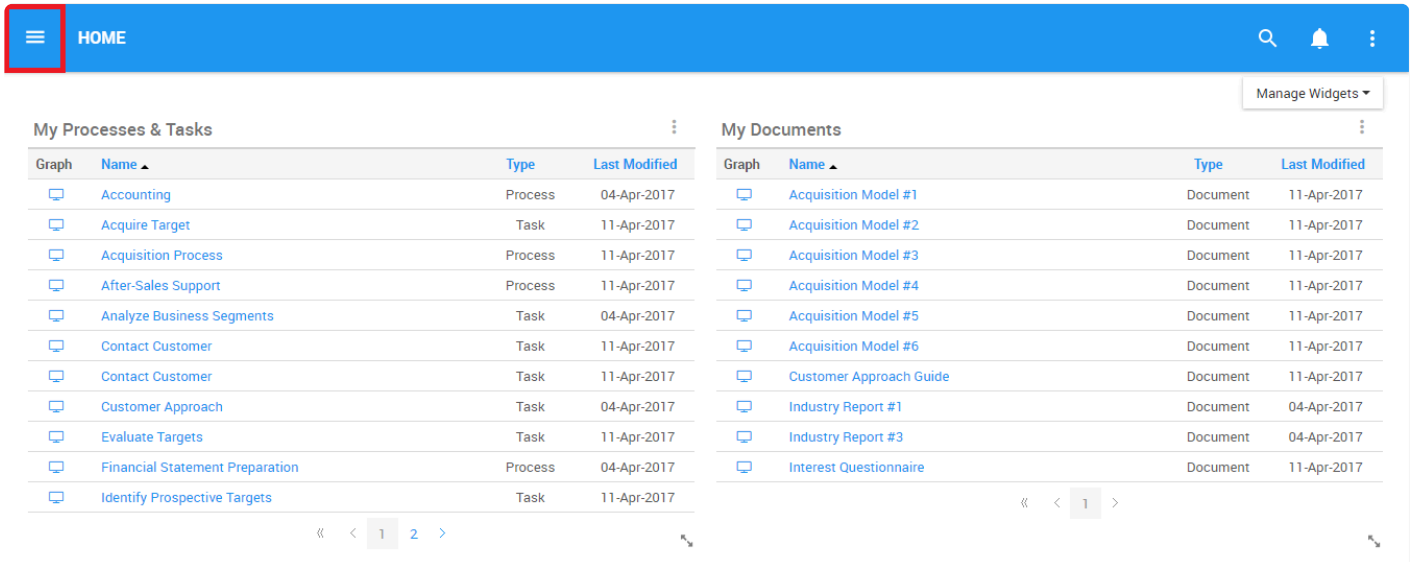
4.3.2 Navigation within a Module

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

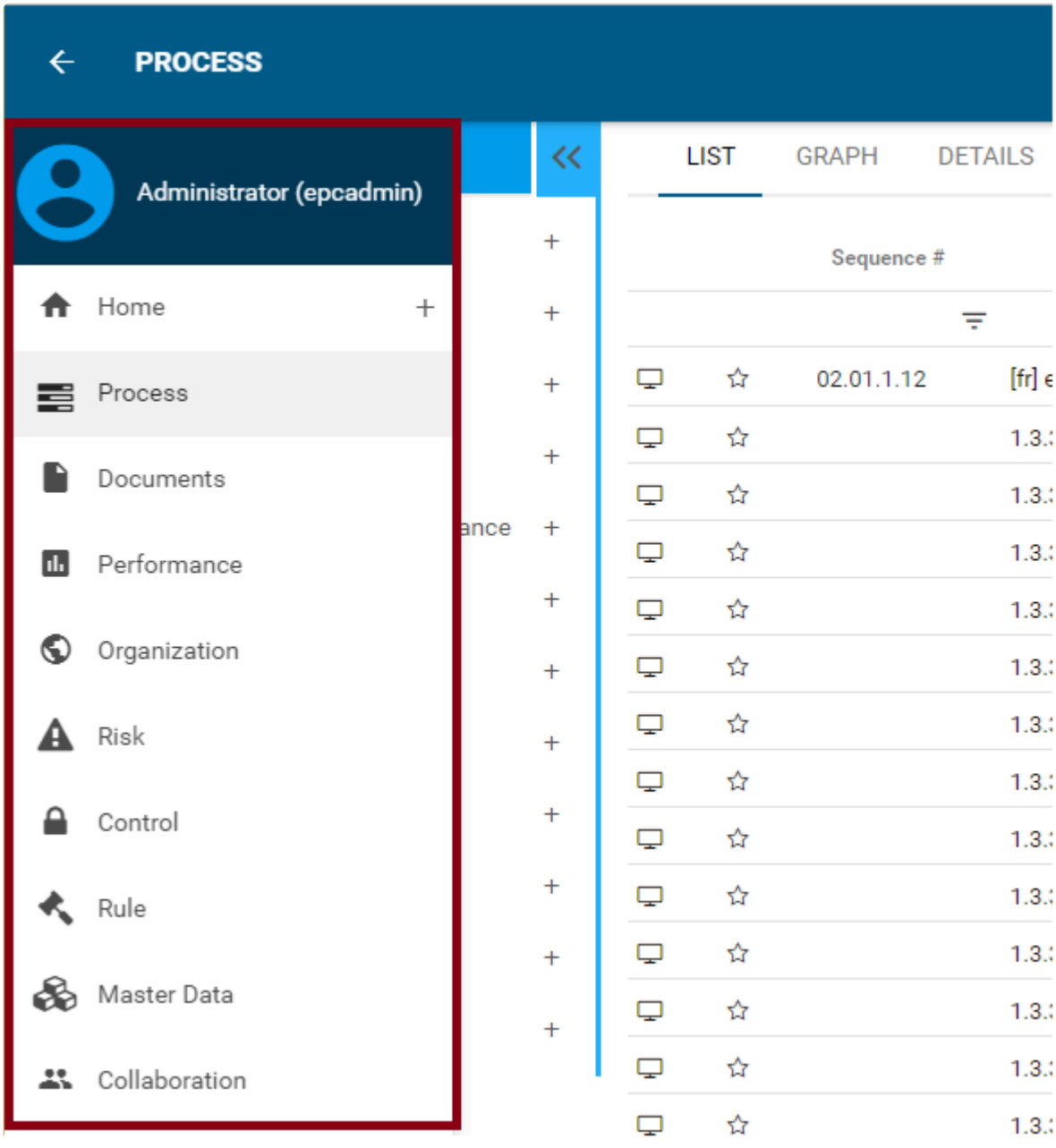
To use the Navigation Tree, please see the following steps:

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

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

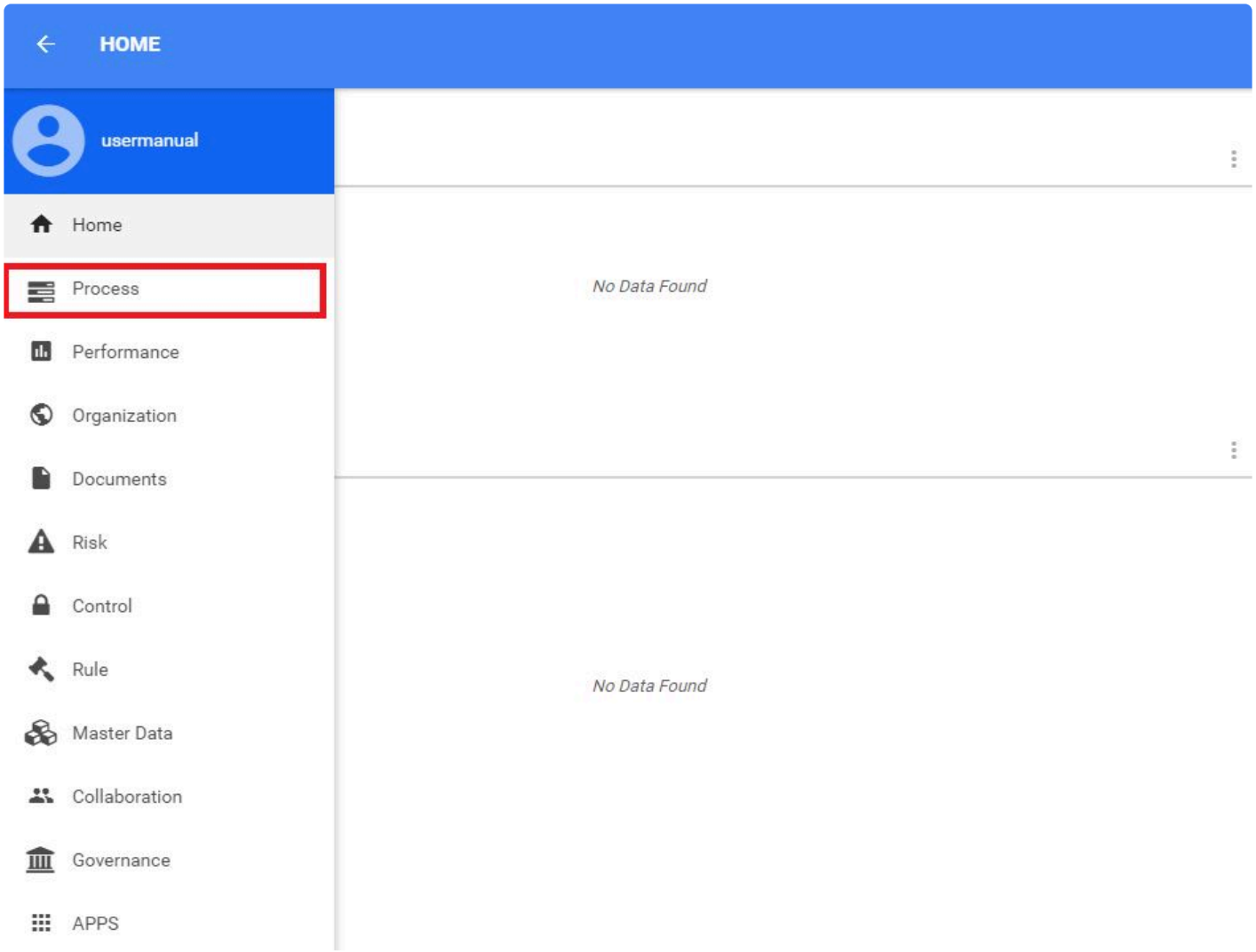


2. Click the Navigation Menu, and Navigation Panel will be generated on the left-handed side of the screen

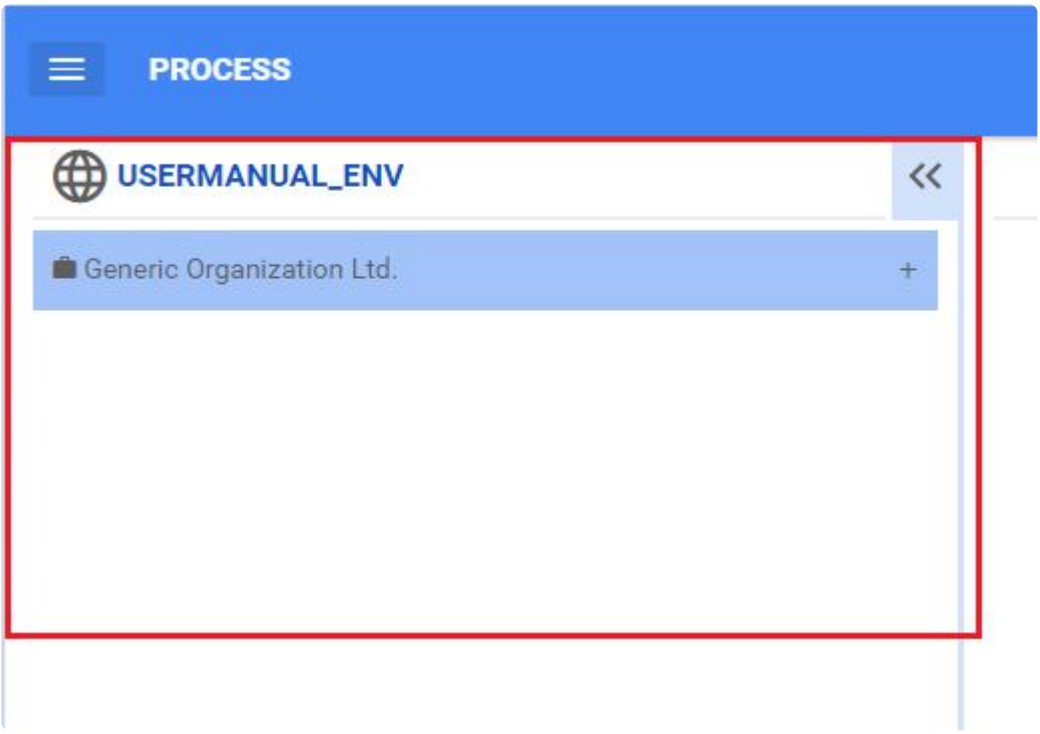


+

3. Select the Process Module



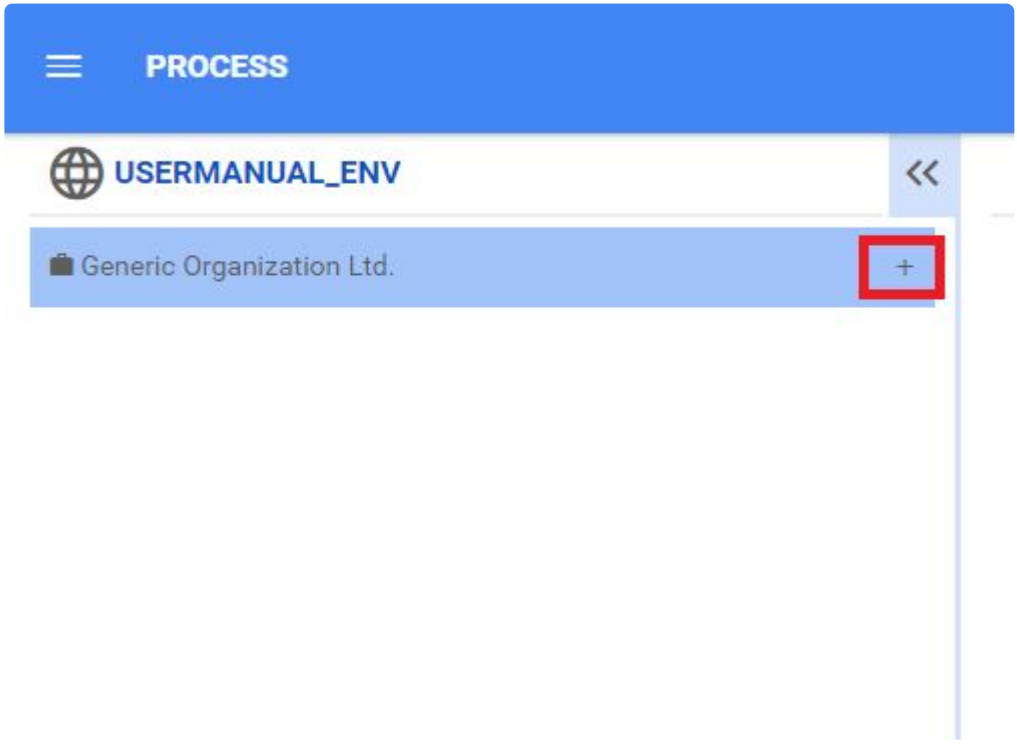
4. Upon selecting a Module, the Navigation Menu will be automatically closed, and the Navigation Tree will can be opened.



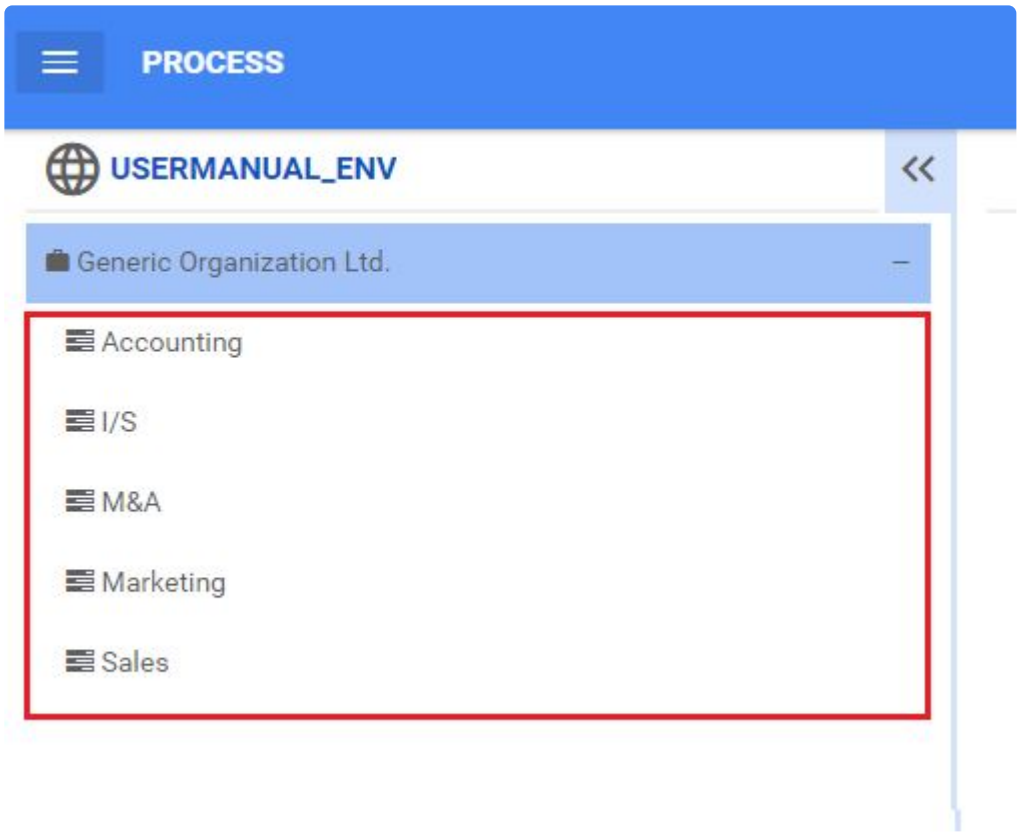
The name at the top of the module

represents the environment you are currently in.

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



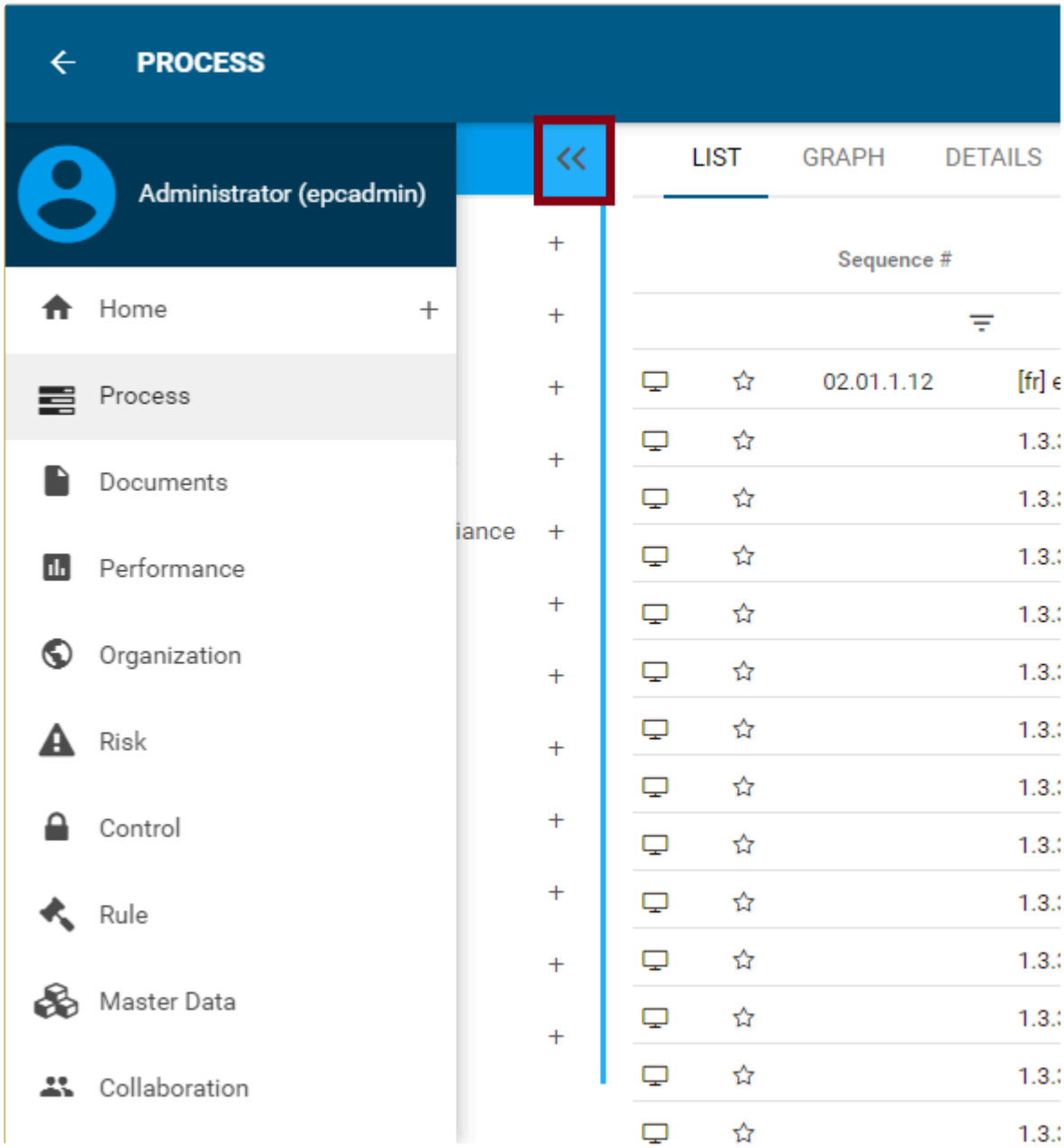
6. Clicking this icon will generate a list of all sub-items



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

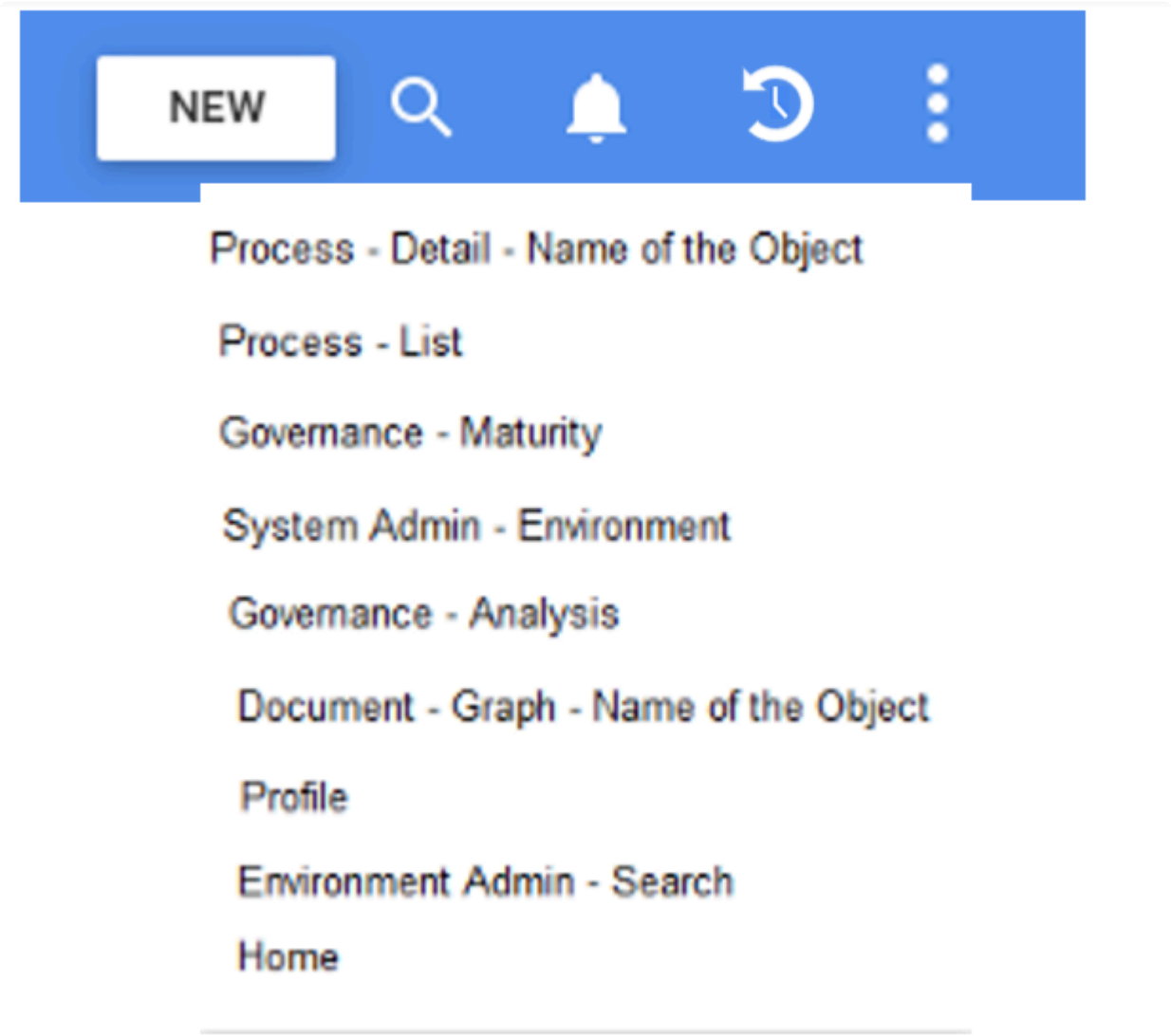

PROCESS
Administrator (epcadmin)
Home
Process
Documents
Performance
Organization
Risk
Control
Rule
Master Data
Collaboration
LIST
GRAPH
DETAILS
Sequence #
02.01.1.12

4.3.3 Last Visited Tab

The **Last Visited** tab can be used to help users navigate to the 10 previously visited EPC pages. The **Last Visited** button will showcase the most recent page you visited to the oldest.
When a user clicks on one of the items from the list, they will be navigated to the page and the list will auto-update to the most recent page you visited.
To use the Last Visited feature, please see the following steps:

1. Click on the “Last Visited Button” icon.

2. A list will appear with the last 10 visited pages



3. When a user arrives on a new page, the list will auto-update to the most recent page visited

> In the event that a user was kicked out of a session from EPC, then the last visited page will be saved and will appear in “Last Visited” tab

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

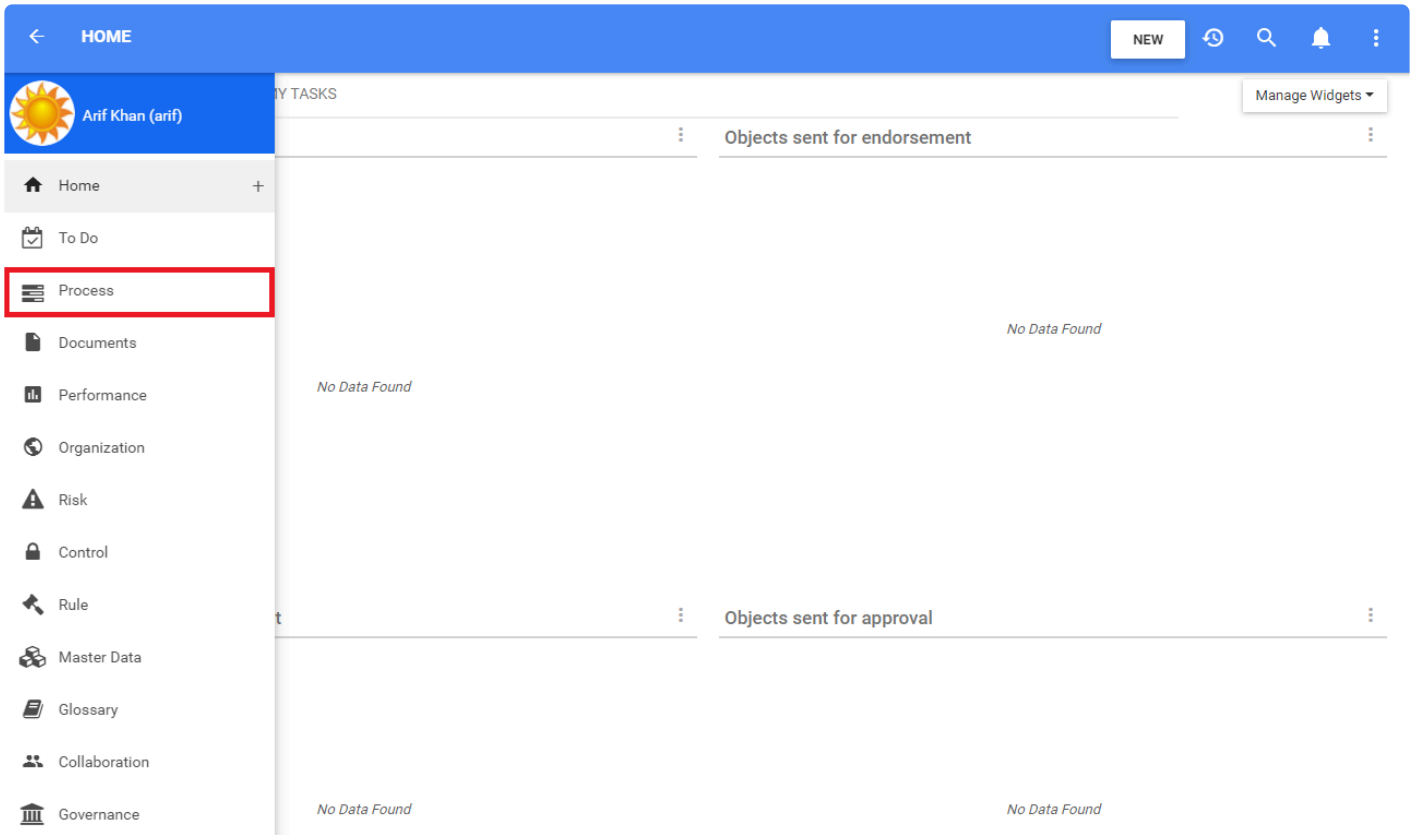
Processes that have been published from the EPC Modeler can be viewed in this module.

How to access the Processes module:

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

or

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. No hierarchy filter	A list view where **all** items within the given module are listed
2. Current level & below	A list view where **all levels below** the selected item are listed
3. Current level	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
Identifier	Textual search for any existing unique identifier of an object
Subtype	Whether or not if this object is classified as a business type
Categories	Whether or not there are Categories directly associated with the item in question
Roles	Whether or not there are Roles directly associated with the item in question
Org Units	Whether or not there are Org Units directly associated with the item in question
Attributes	Whether or not there are Attributes directly associated with the item in question
Entity	Whether or not there are Entity directly associated with the item in question
Asset	Whether or not there are Assets inputted for the item in question
Control	Whether or not there are Controls directly associated with the item in

	question
Risk	Whether or not there are Risks directly associated with the item in question
Rule	Whether or not there are Rules directly associated with the item in question
Resource	Whether or not there are Controls directly associated with the item in question
Documents	Whether or not there are Documents directly associated with the item in question
Goal	The goal associated with 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
Objective	Whether or not there are Objectives directly associated with the item in question
KCI	Whether or not there are KCIs directly associated with the item in question
KPI	Whether or not there are KPIs directly associated with the item in question
KRI	Whether or not there are KRI directly associated with the item in question
Modified Date	The last date that the object in question was modified
Last Modified By	The name of the last resource that modified the object
Status (Available in Show Latest)	View the status of the item in question (Published vs. in-progress)
Locked	Whether the item in question is currently locked or not
Last Modified By	The name of the last resource that modified the object

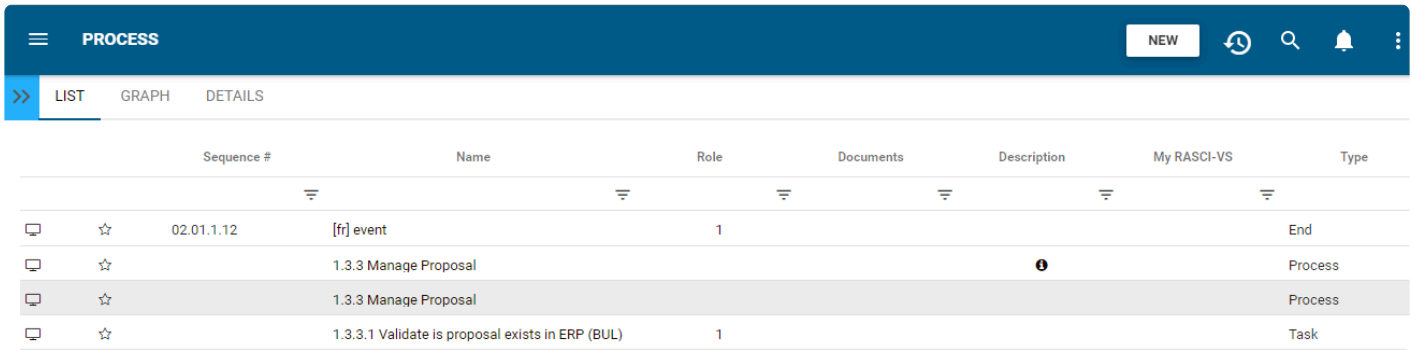
The number of columns displayed will be contingent on the user's screen resolution.

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

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

2. Click on **Process**

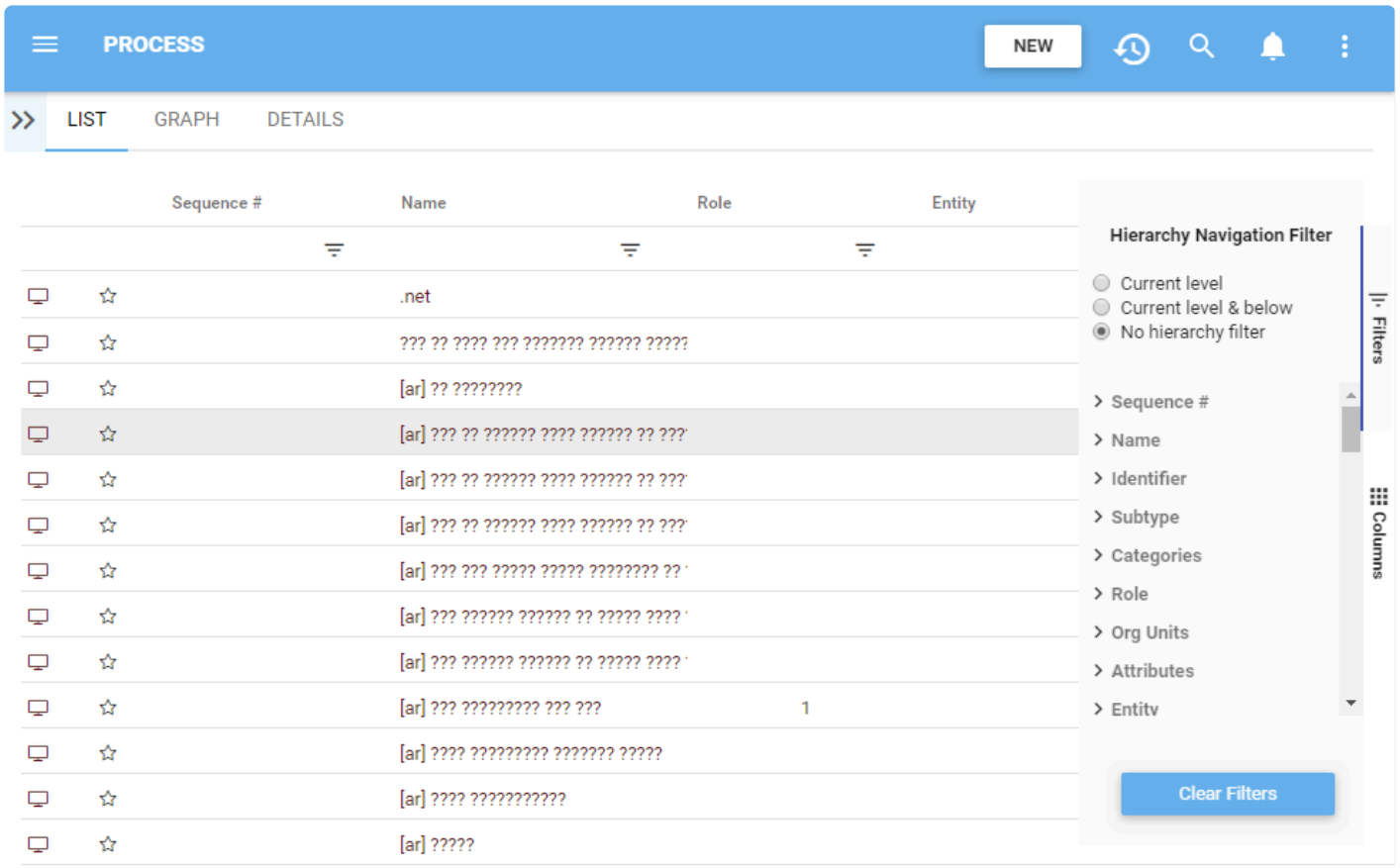
3. You will be directed to **List View** in the Process module (as shown below).



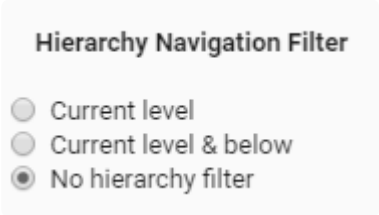
Upon navigating to the Process Module, users will view all major processes that they are associated to.

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

4. **(Optional)** To view sub-processes, users must select the “Current Level & Below” option available in the filter panel available on the EPC Web App.



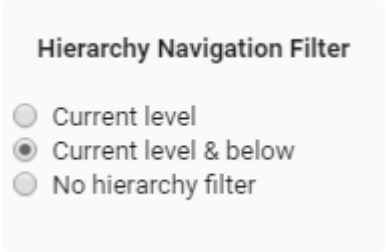
5. **(Optional)** Click on the filter panel and it will generate a list of Hierarchy Navigation Filter



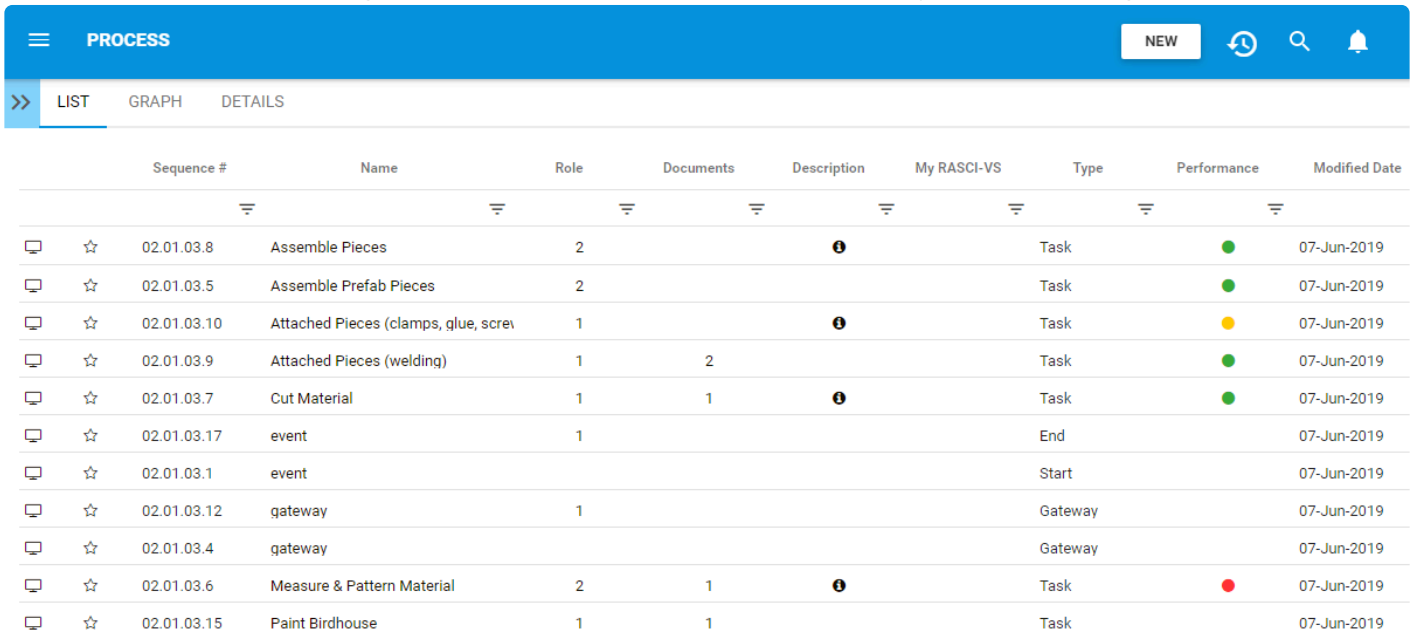
> The selected list view will save both by web browser and by user.

> 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 “Current level & below”



7. **(Optional)** Upon selecting the “checkbox”, the EPC will automatically refresh the page



Sequence #	Name	Role	Documents	Description	My RASCI-VS	Type	Performance	Modified Date
02.01.03.8	Assemble Pieces	2				Task		07-Jun-2019
02.01.03.5	Assemble Prefab Pieces	2				Task		07-Jun-2019
02.01.03.10	Attached Pieces (clamps, glue, screv	1				Task		07-Jun-2019
02.01.03.9	Attached Pieces (welding)	1	2			Task		07-Jun-2019
02.01.03.7	Cut Material	1	1			Task		07-Jun-2019
02.01.03.17	event	1				End		07-Jun-2019
02.01.03.1	event					Start		07-Jun-2019
02.01.03.12	gateway	1				Gateway		07-Jun-2019
02.01.03.4	gateway					Gateway		07-Jun-2019
02.01.03.6	Measure & Pattern Material	2	1			Task		07-Jun-2019
02.01.03.15	Paint Birdhouse	1	1			Task		07-Jun-2019

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

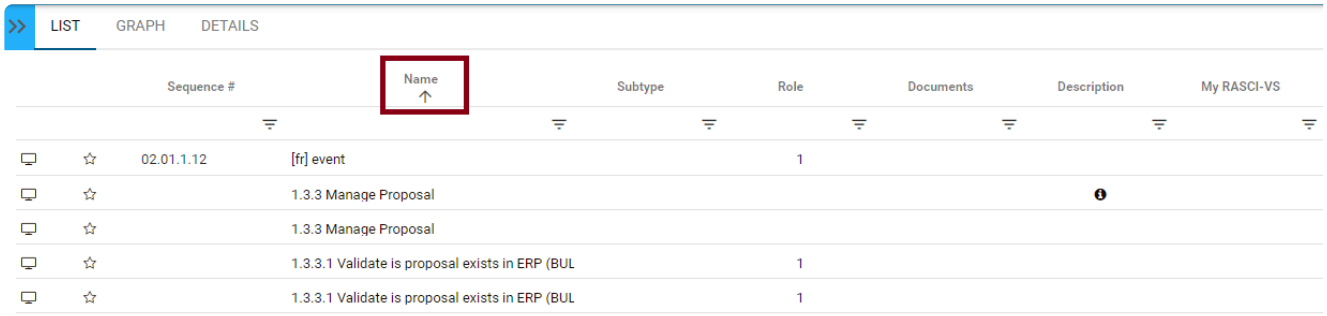
1. Navigate to the Process Module

2. Navigate Cursor to desired **Category**

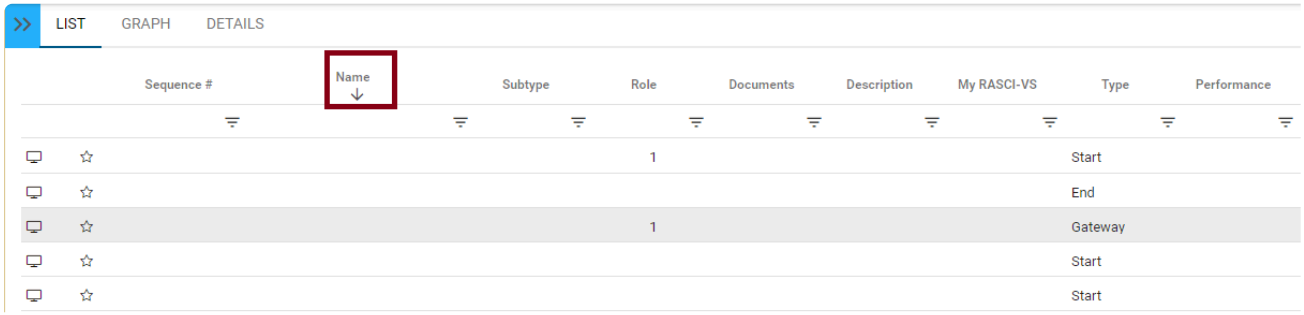
3. Click on the **Category**

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".



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



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
Identifier	Empty – The object does not have a unique identifier Not-Empty – The object has a unique identifier
Subtype	Empty – The object does not have a business type associated Not-Empty – The object has at least one business type associated
Categories	Empty – The object has no category associated Not-Empty – The object has at least one associated category
Role	Empty – The object has no associated roles Not-Empty – The object has at least one associated role
Org Units	Empty – The object has no associated org unit Not-Empty – The object has at least one associated org unit
Attribute	Empty – The object has no associated attribute Not-Empty – The object has at least one associated attribute
Entity	Empty – The object has no associated entity Not-Empty – The object has at least one associated entity
Asset	Empty – The object has no associated asset Not-Empty – The object has at least one associated asset
Control	Empty – The object has no associated control Not-Empty – The object has at least one associated control
Risk	Empty – The object has no associated risk Not-Empty – The object has at least one associated risk
Rule	Empty – The object has no associated rule Not-Empty – The object has at least one associated rule
Resource	Empty – The object has no associated resource Not-Empty – The object has at least one associated resource

© 2020 Interfacing Technologies Corporation

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
Goal	Empty – The object has no goal Not-Empty – The object has a goal
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 No color
Objective	Empty – The object has no associated objective Not-Empty – The object has at least one associated objective
KCI	Empty – The object has no associated kci Not-Empty – The object has at least one associated kci
KPI	Empty – The object has no associated kpi Not-Empty – The object has at least one associated kpi
KRI	Empty – The object has no associated kri Not-Empty – The object has at least one associated kri
Last Modify By	Textual search of last resource who last modified an object
Modified Date	Date – mm/dd/yyyy
Parent	Empty – The object has no associated parent Not-Empty – The object has at least one associated parent
Status (Available in Show Latest)	View the status of the item in question (Published vs. in-progress)

	Sent for Review Approved Rejected Under Revision Revised
Locked	False – The object isn't locked True – The object is locked

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

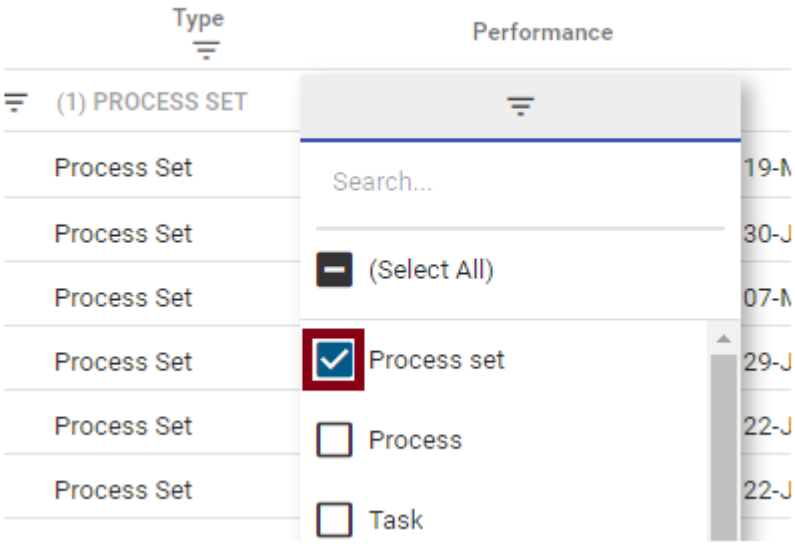
Default filters can be applied to specific sections of the EPC. By default, a filter is applied so that you only see processes upon initial loading of the module.

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.

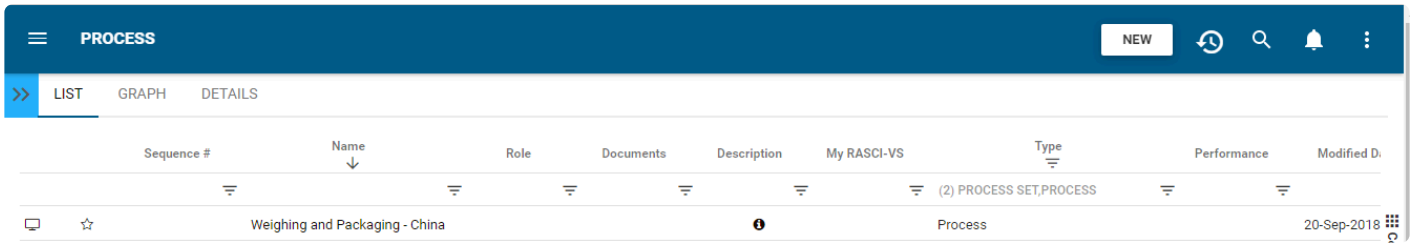
Click on the button beside the filter name.



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.

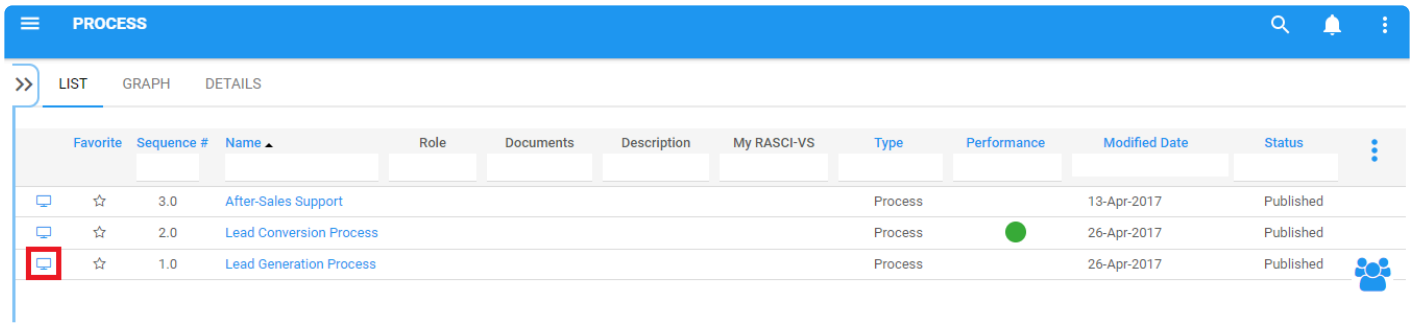
4.4.2.3 Quick Graph View

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

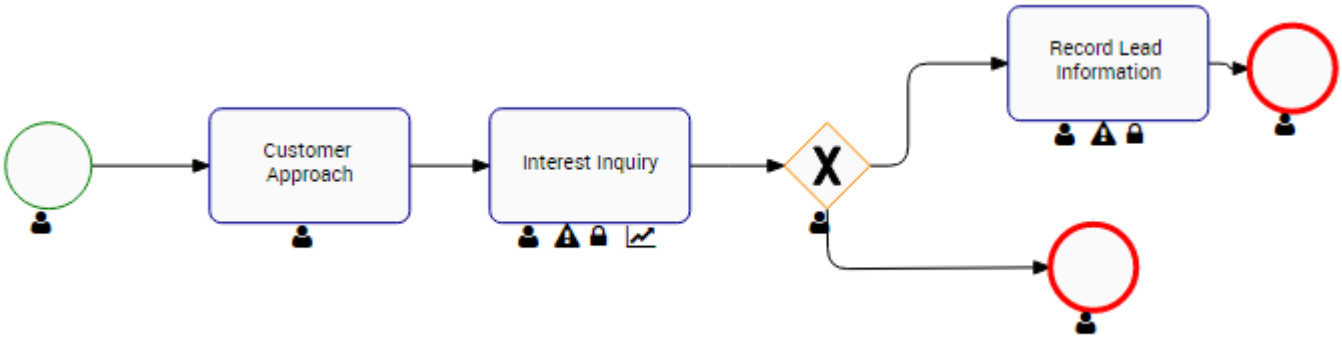
Please see the instructions below:

1. Navigate to Process Module

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



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



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

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.

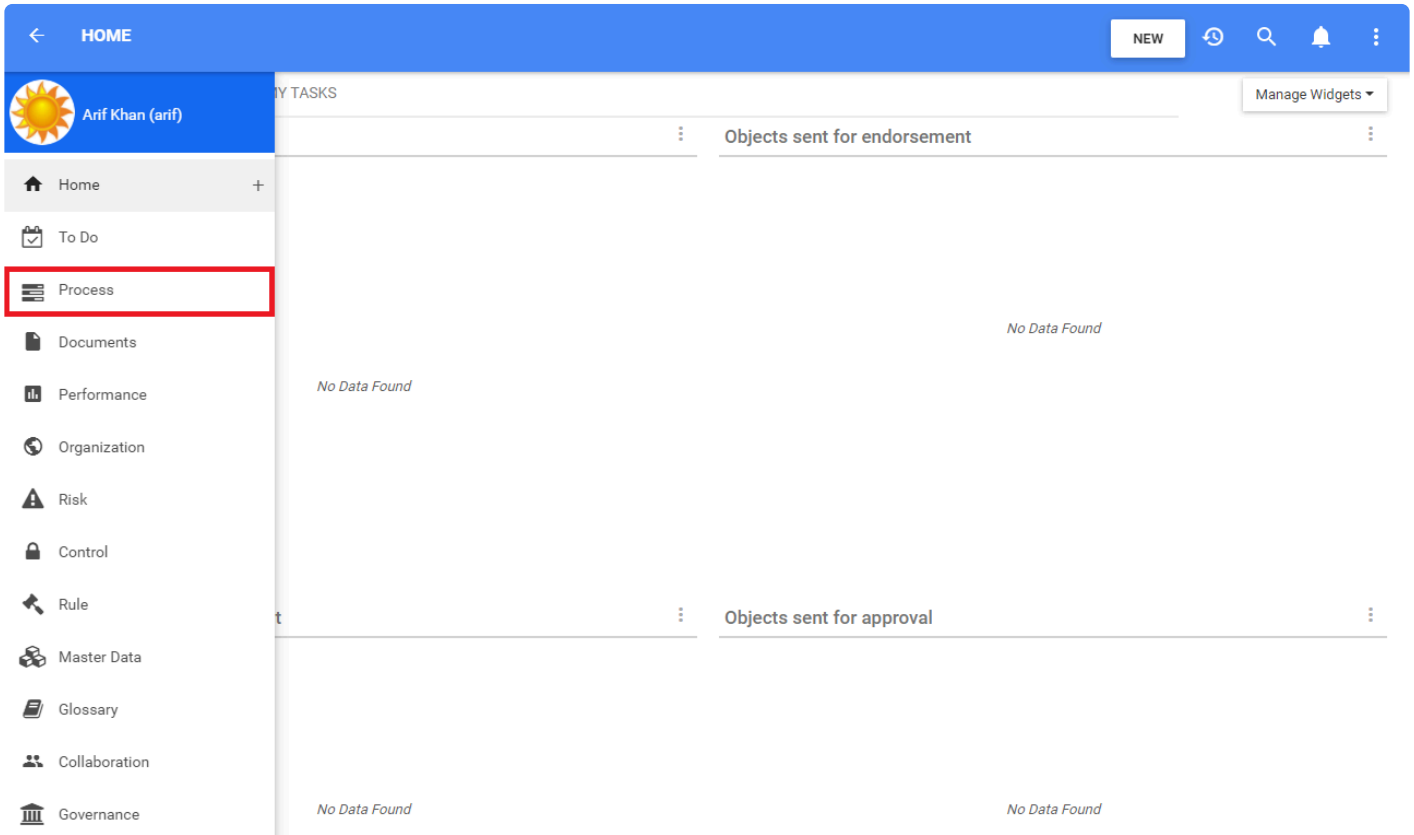
This section will outline Manual Navigation, please see “Quick Graph View section for alternative navigation options.

How to navigate to the Graph section (Manual Navigation)

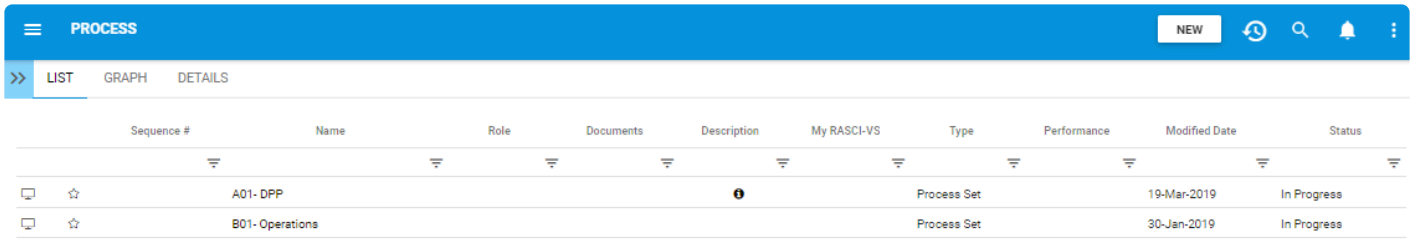
1. Click on the **Navigation Menu Button** on the top left of your screen.

or

2. Click on **Process**

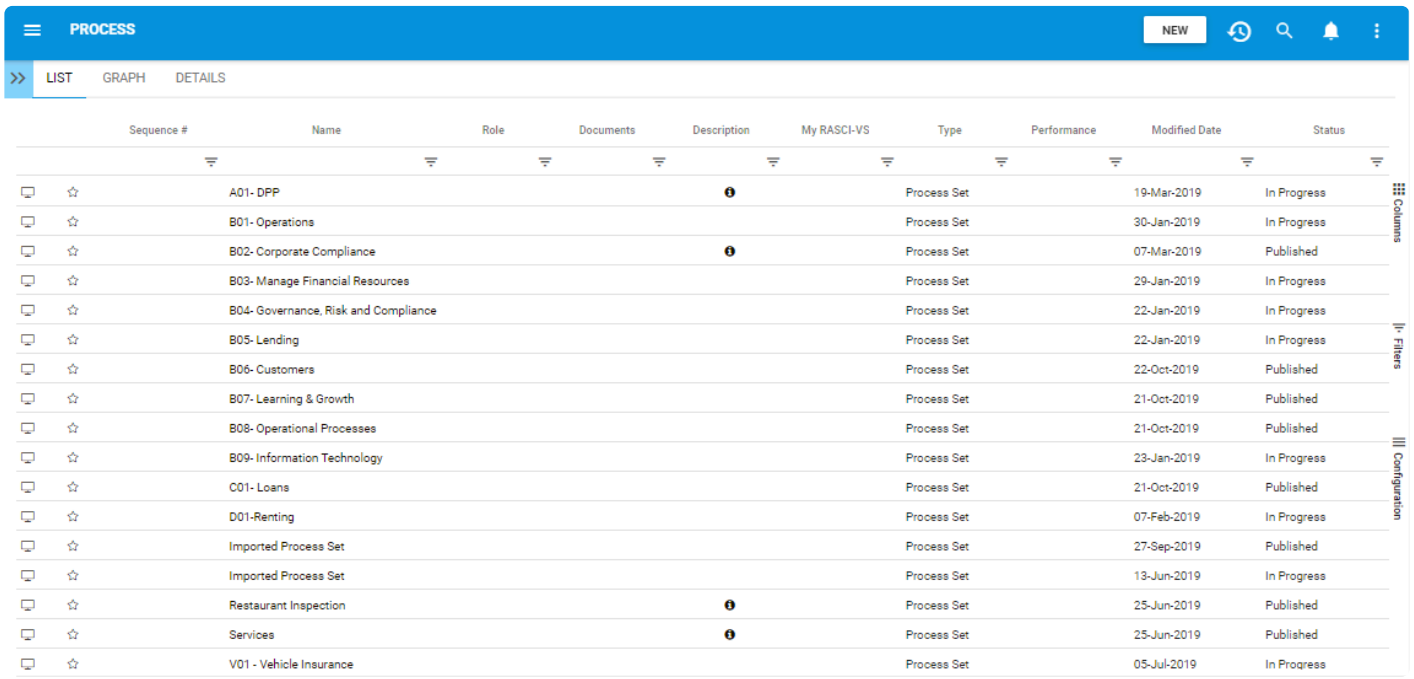


3. By default, you will be directed to **List View** in the Process module (as seen below).

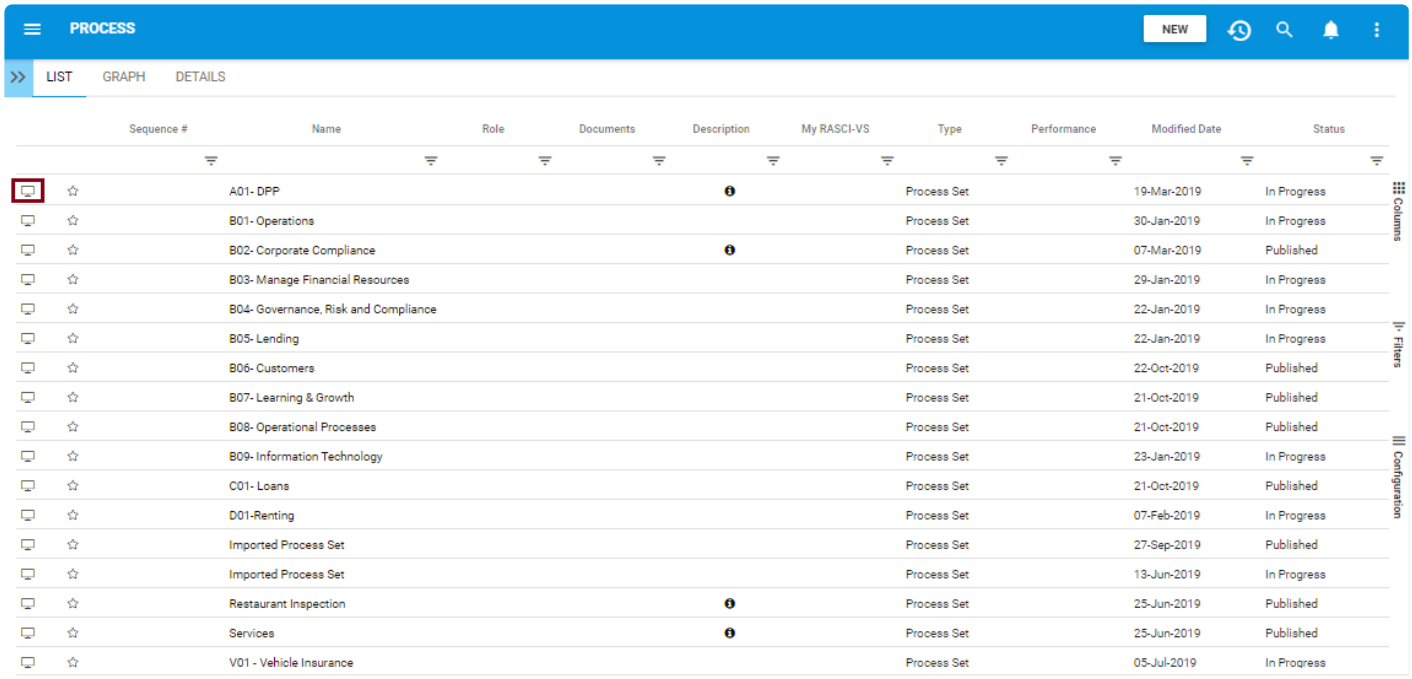


4. Select a process or expand your current List View by selecting the “Drilldown List”

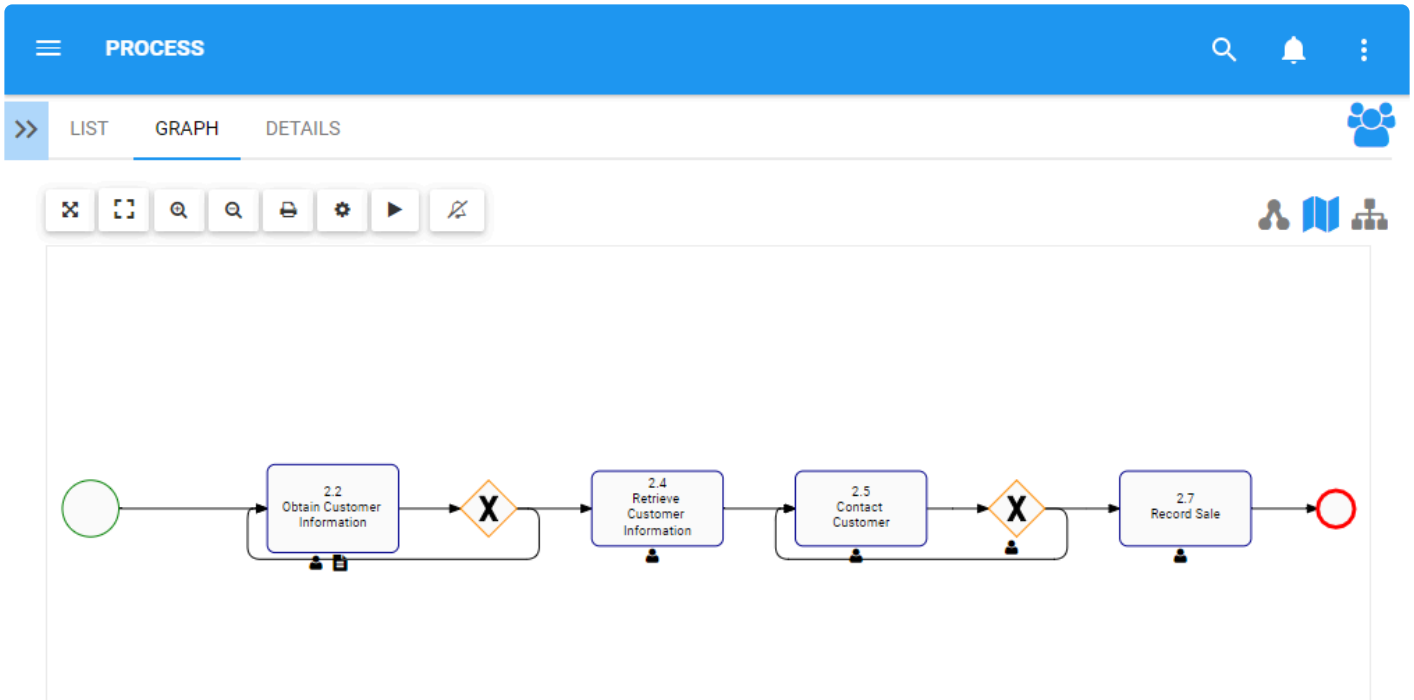
5. Upon selecting the “check box”, the EPC will automatically re-fresh the page to include all of the child processes and related objects.



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



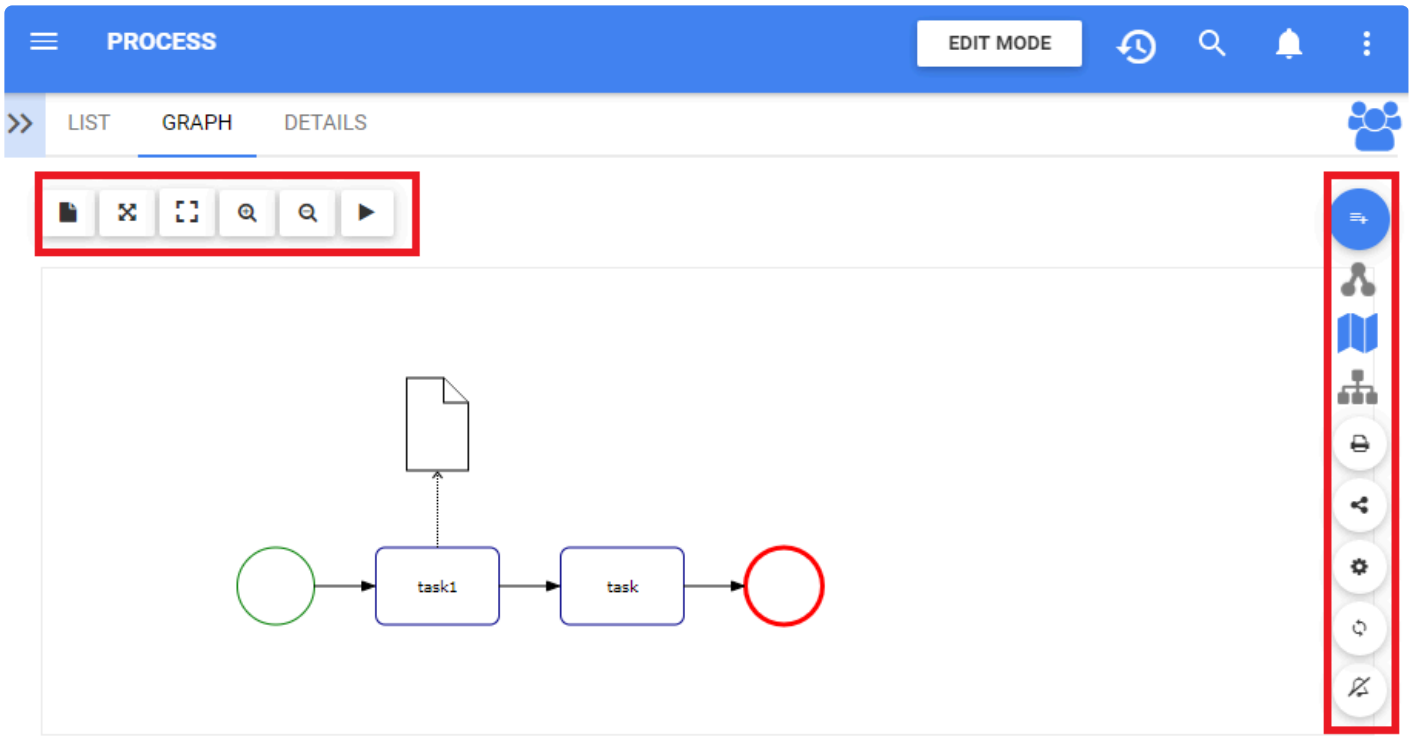
7. You will be navigated to the Graph section. By default, users will be sent to Map view in the default Graph view. An example of this view can be seen below



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
Process Book		This button will open the template selection window
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
Auto Layout		This button will re-organize the process being viewed to a computer generated layout

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

each item.

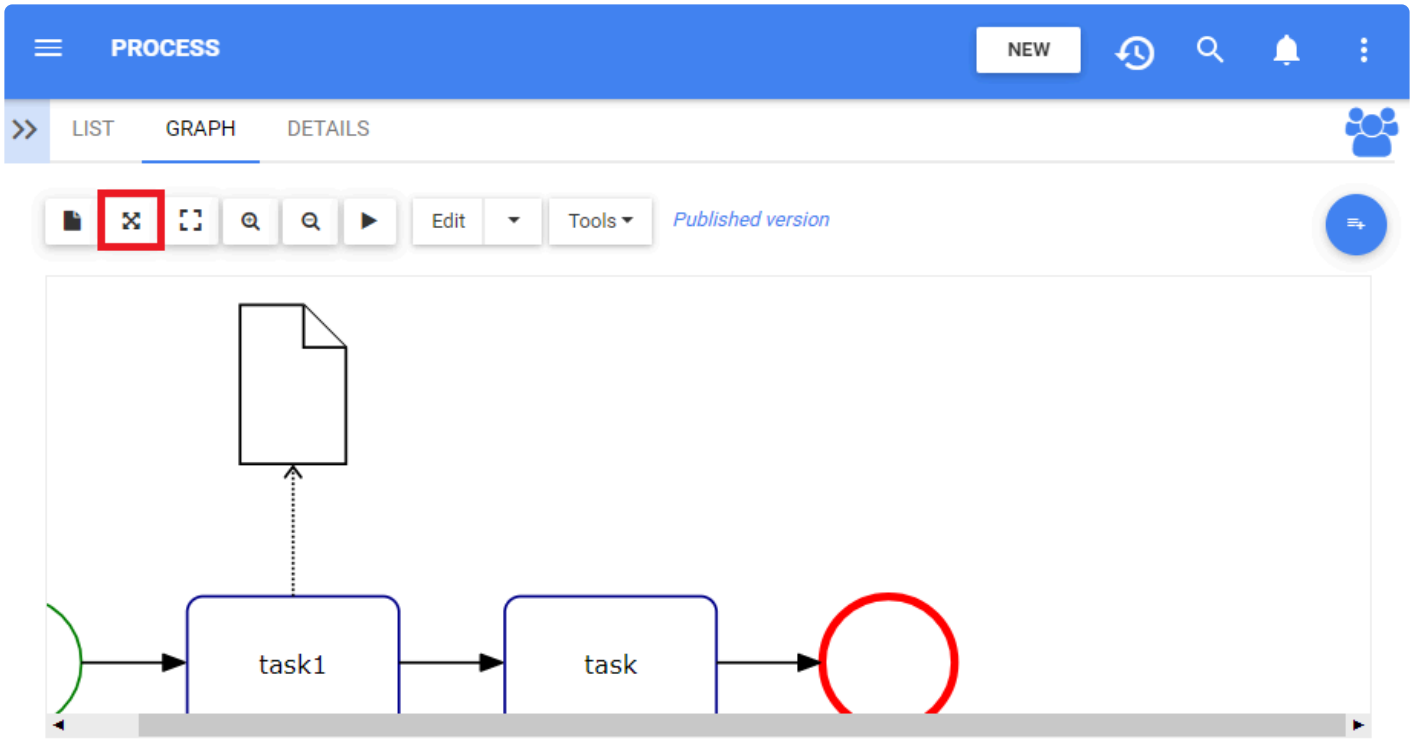
Item	Icon	Description
Impact Graph		Graph showing downstream representation of associated items
Map Graph		Traditional BPMN viewing Graph, featuring traditional Graph View, Swimlane and Matrix Swimlane options
Hierarchy Graph		Graph showing a top-down view of processes and how they fit within organizations
Print		This button will allow a user to print the process being viewed
Share		This button will allow a user to share the process being viewed
Options		This button will allow a user to modify the settings associated with their Graphs
Sync		This button will allow a user to sync the changes done by another associated user without refreshing the pages
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

4.4.3.1.1.1 Fit Screen

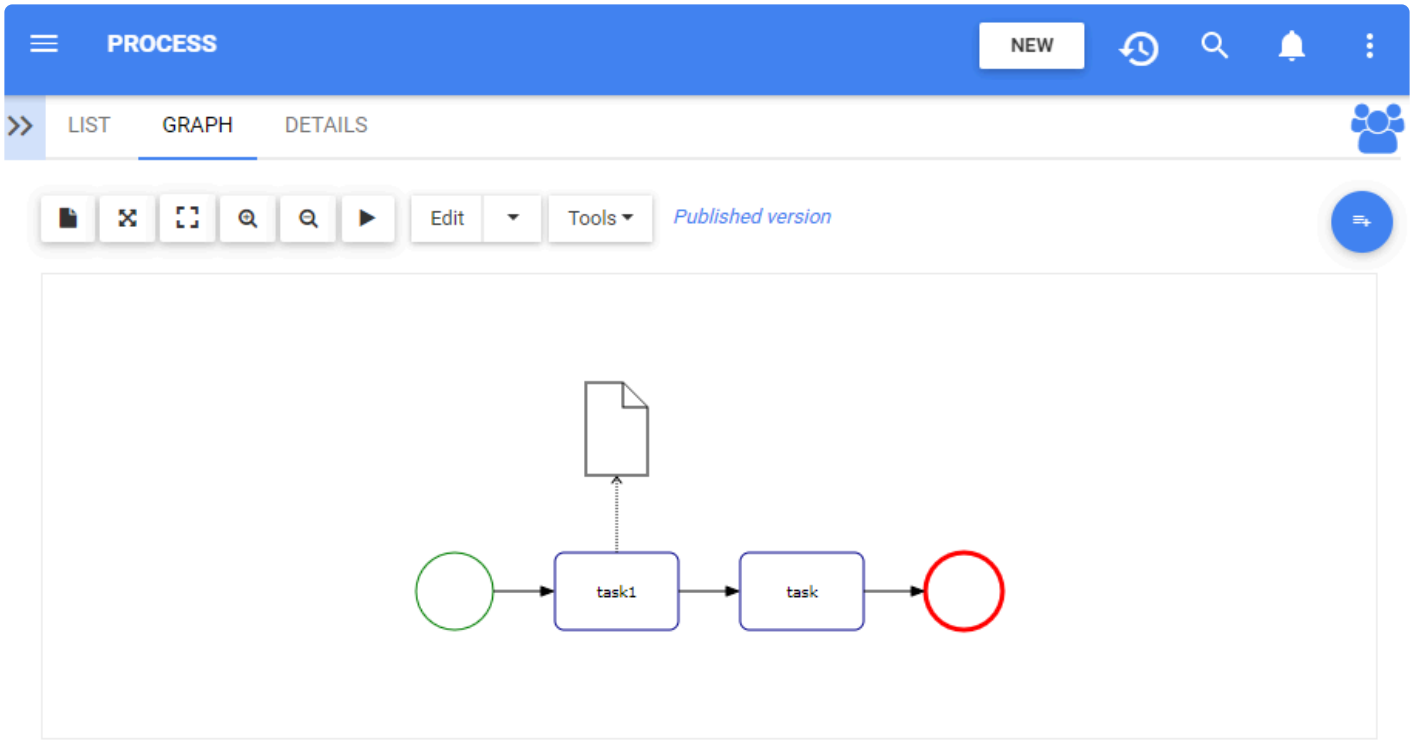
The fit screen function has been implemented to assist users replacing and re-centering processes.

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.

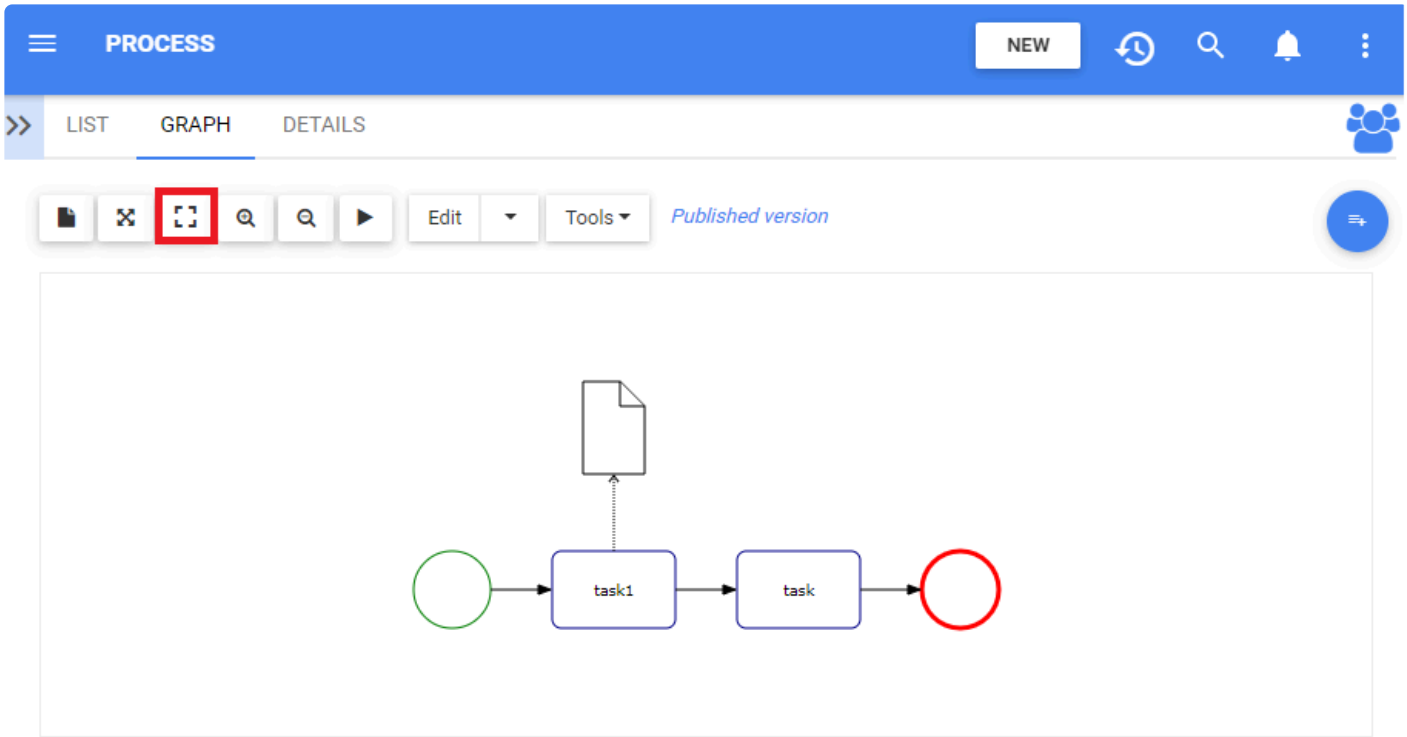

PROCESS
NEW
LIST
GRAPH
DETAILS
Edit
Tools
Published version
task1
task

4.4.3.1.1.2 Full Screen

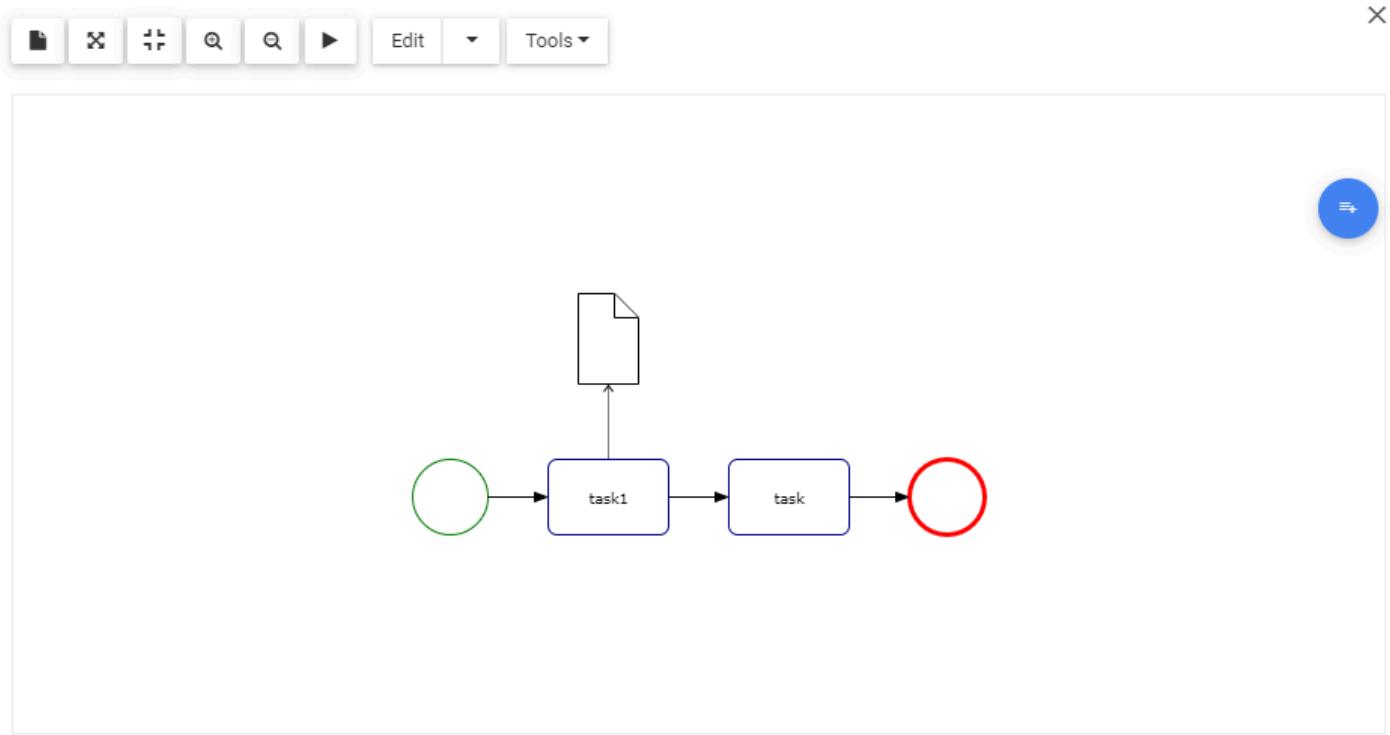
The full screen function has been implemented to assist users at viewing processes, utilizing the full screen of a user.

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

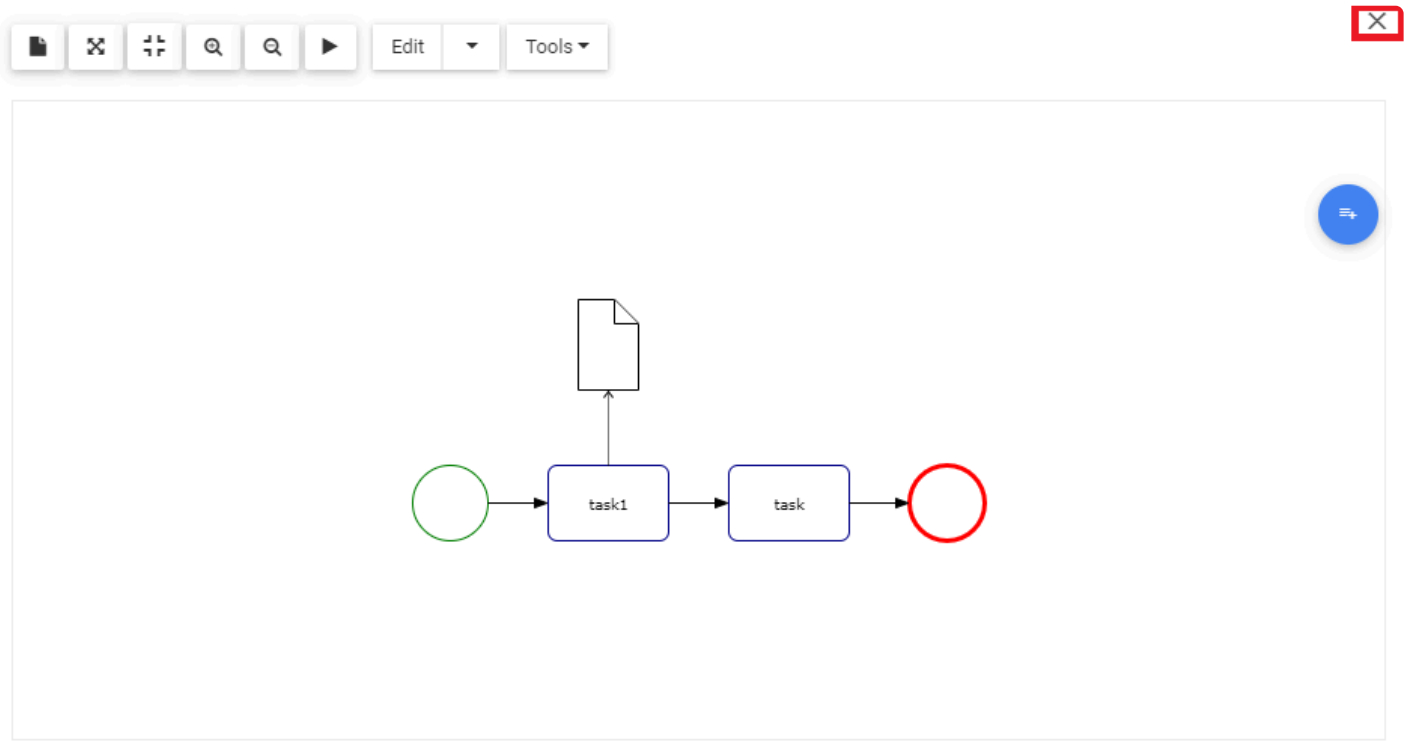
1. Select the full-screen button at the top-left hand corner of the screen



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

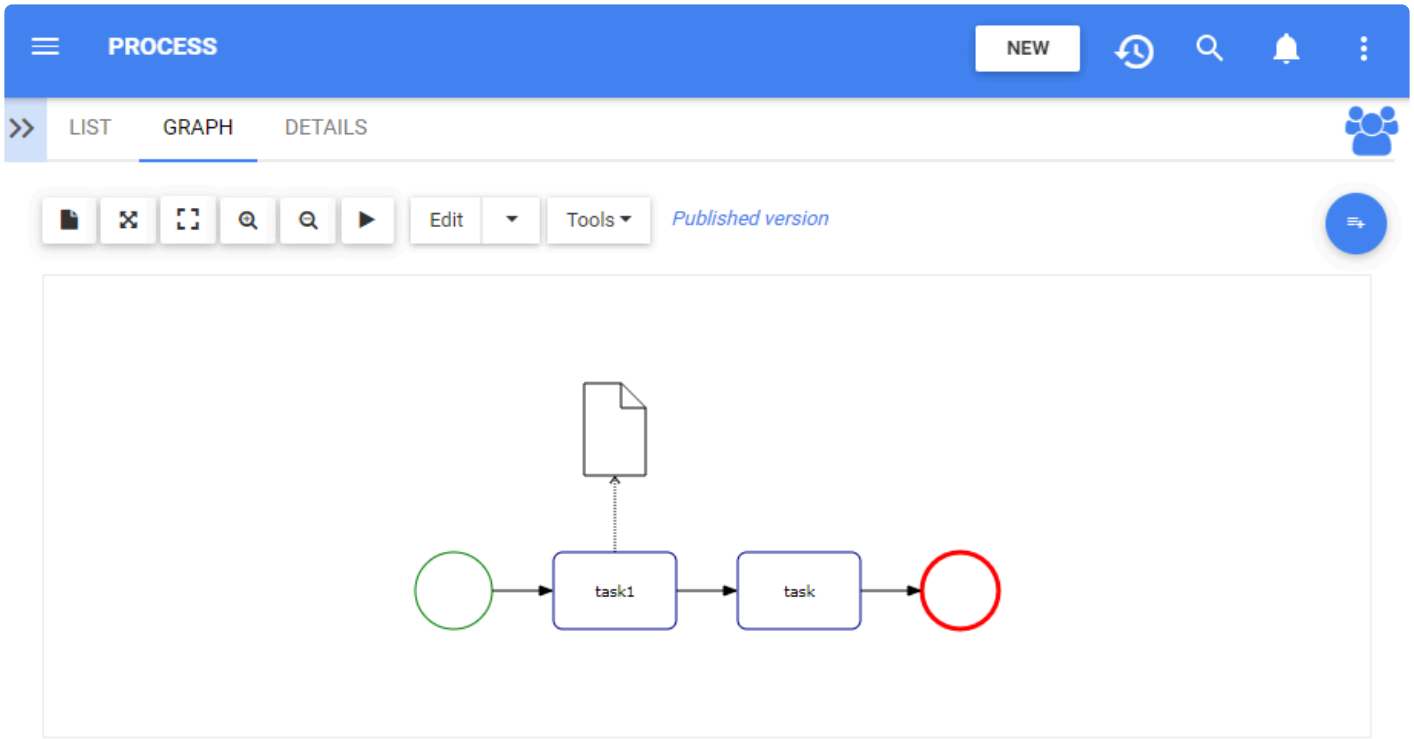


4.4.3.1.1.3 Zoom In

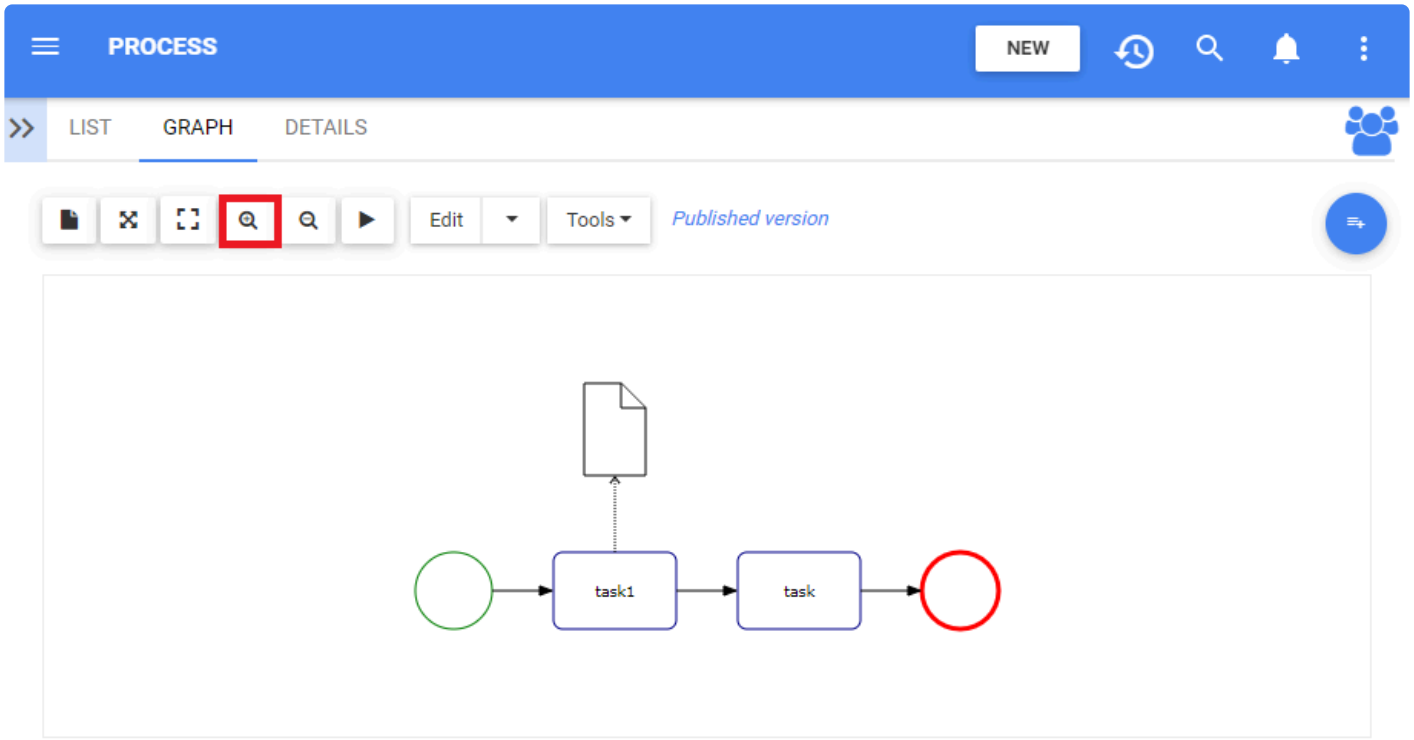
The zoom function has been implemented to assist users in viewing specific items within selected processes

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

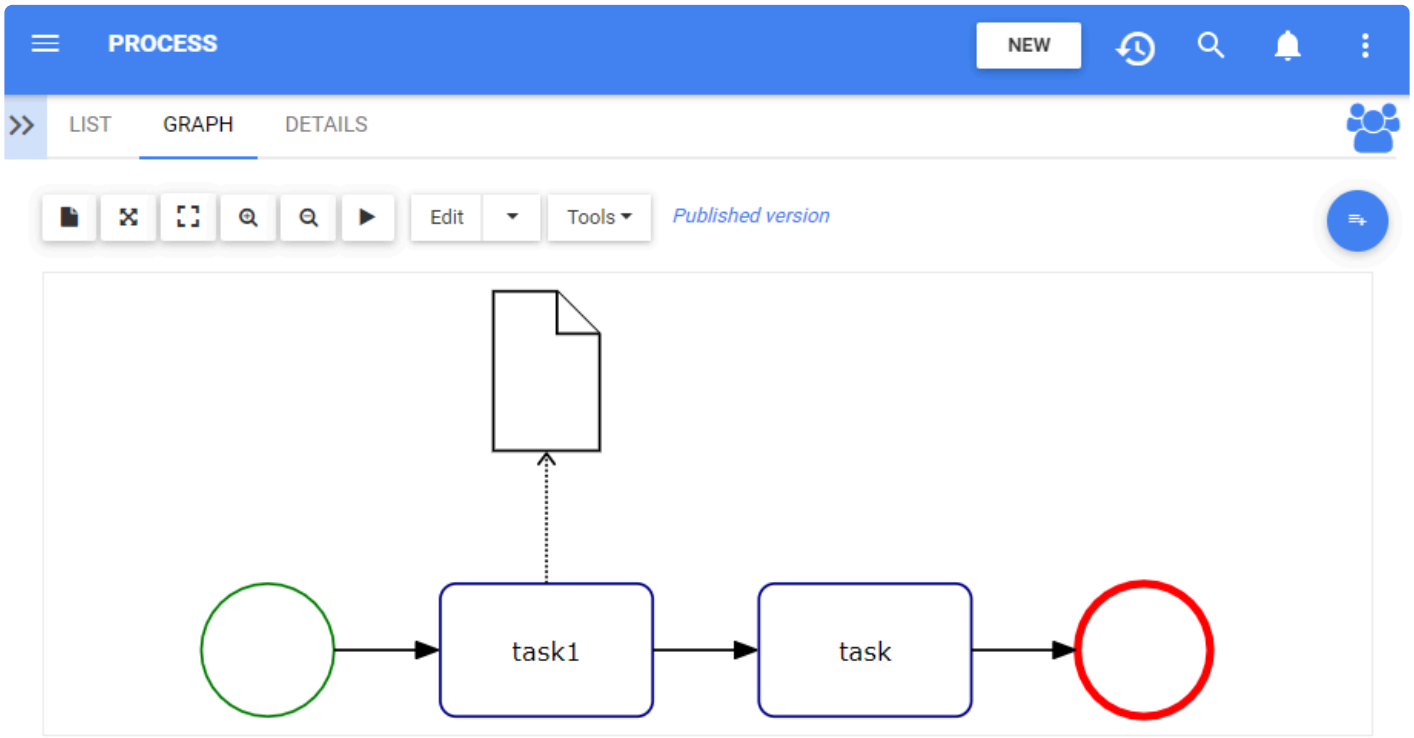
1. Navigate to the Graph tab



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

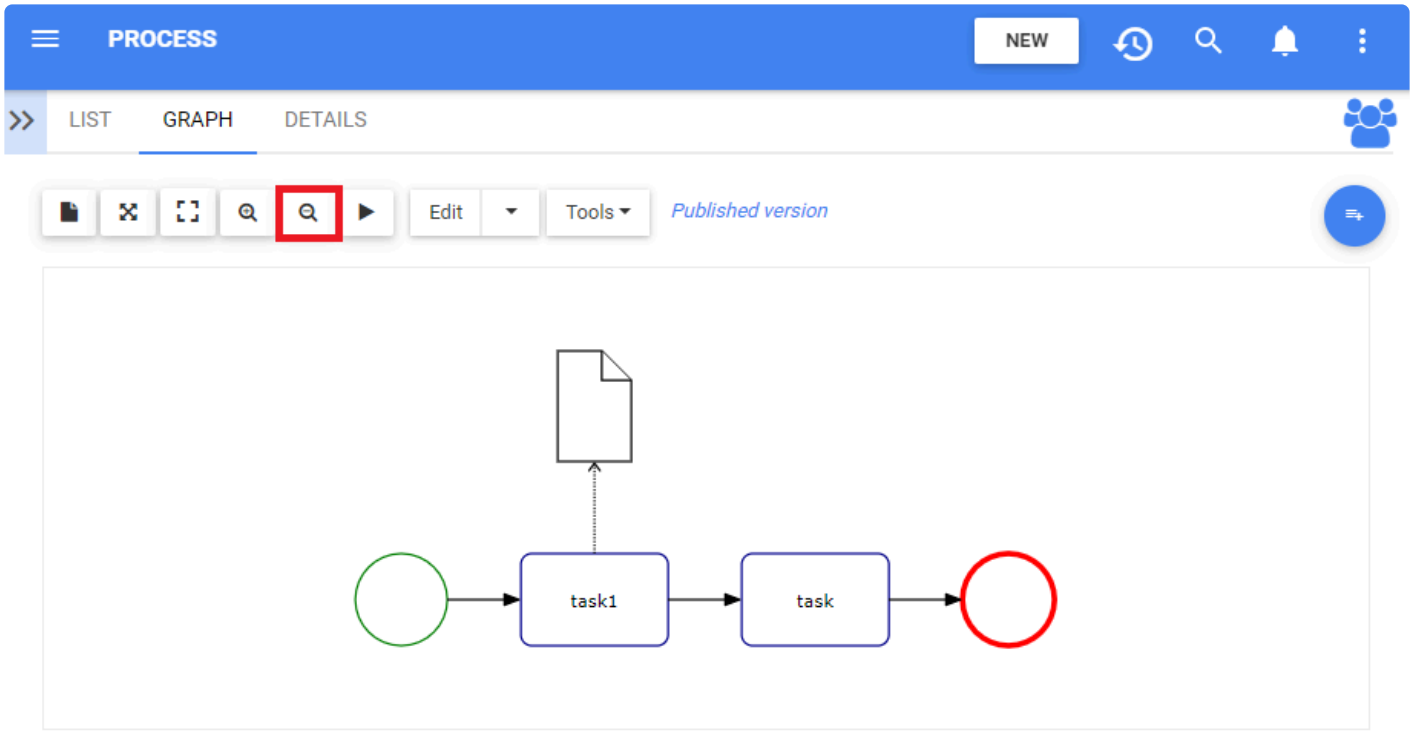
Mobile: Users can zoom in or out on mobile devices with the use of 2 fingers.
Zooming In: Place two fingers on the screen and drag them in opposite directions until desired zoom is reached.

4.4.3.1.1.4 Zoom Out

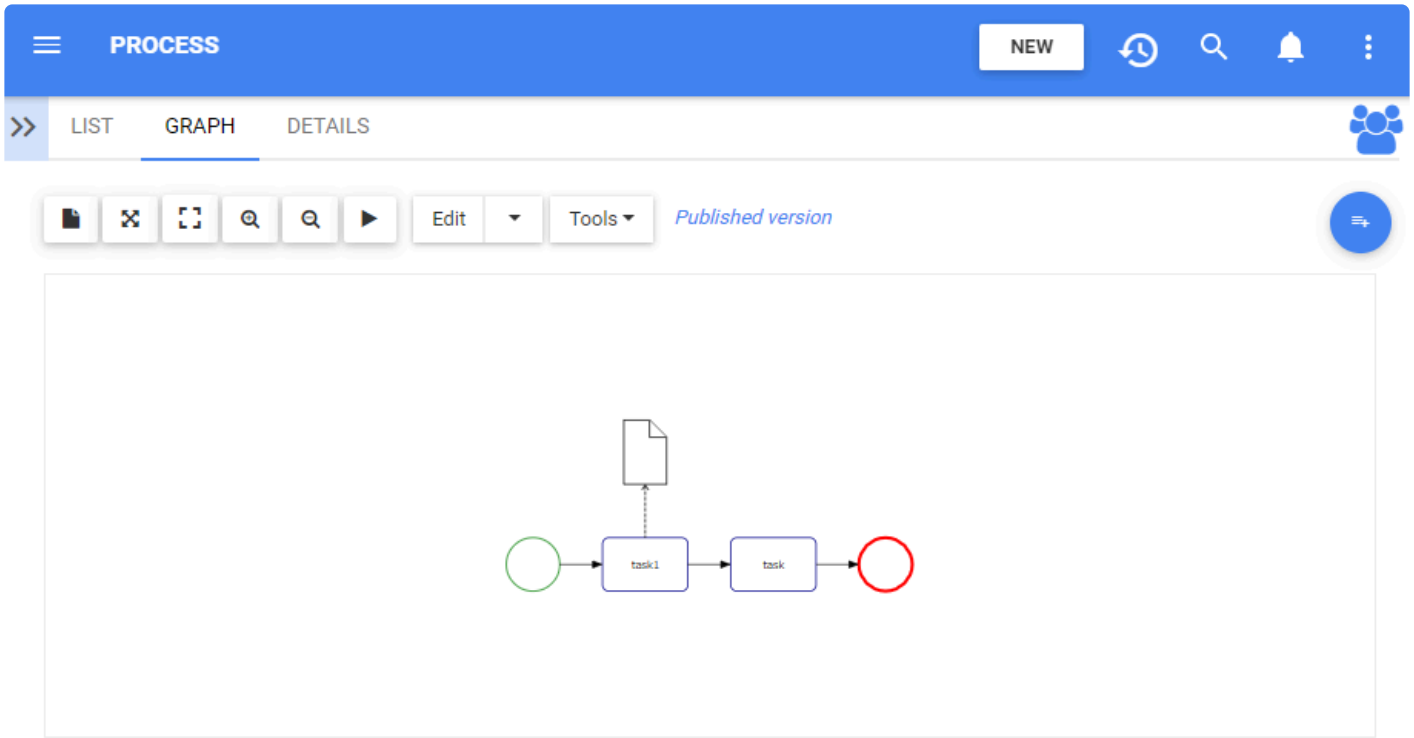
The zoom function has been implemented to assist users in viewing specific items within selected processes

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

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



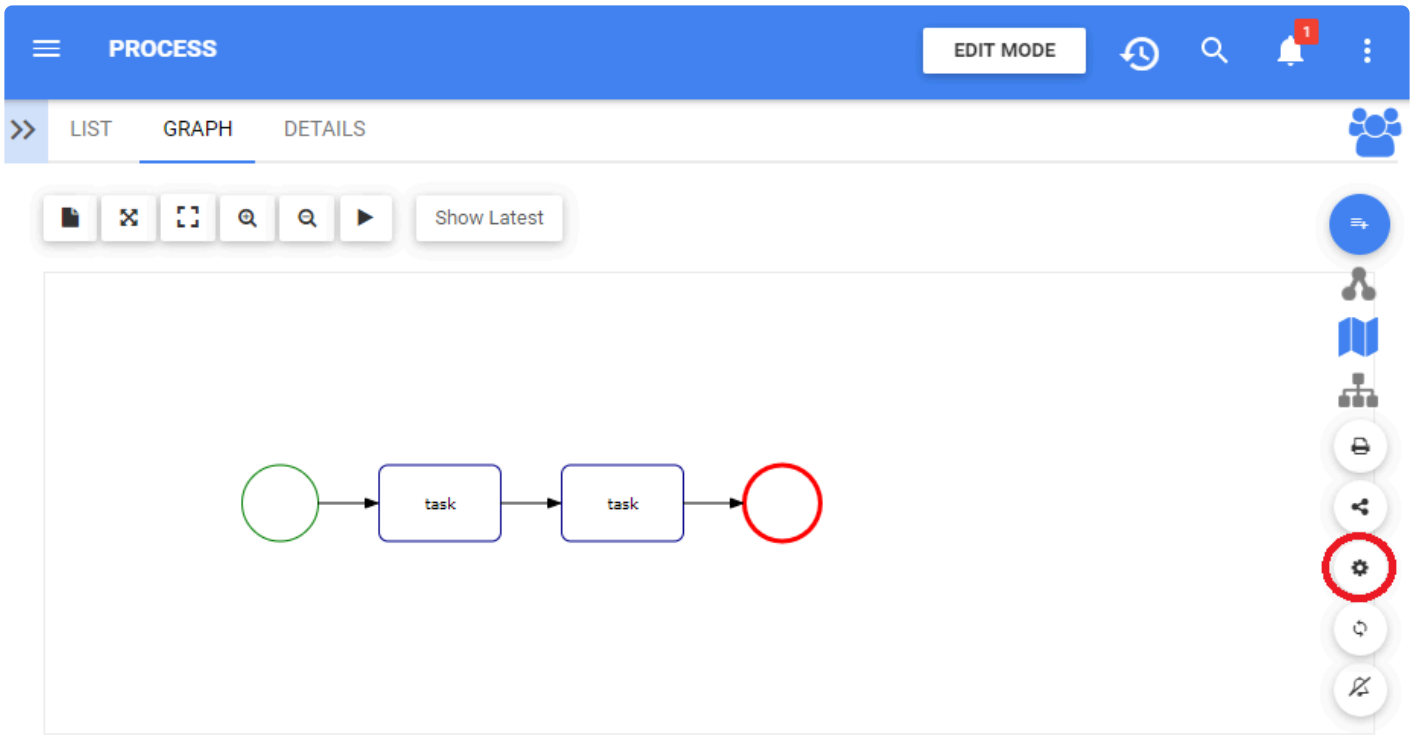
2. Click button until reaching desired Zoom



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



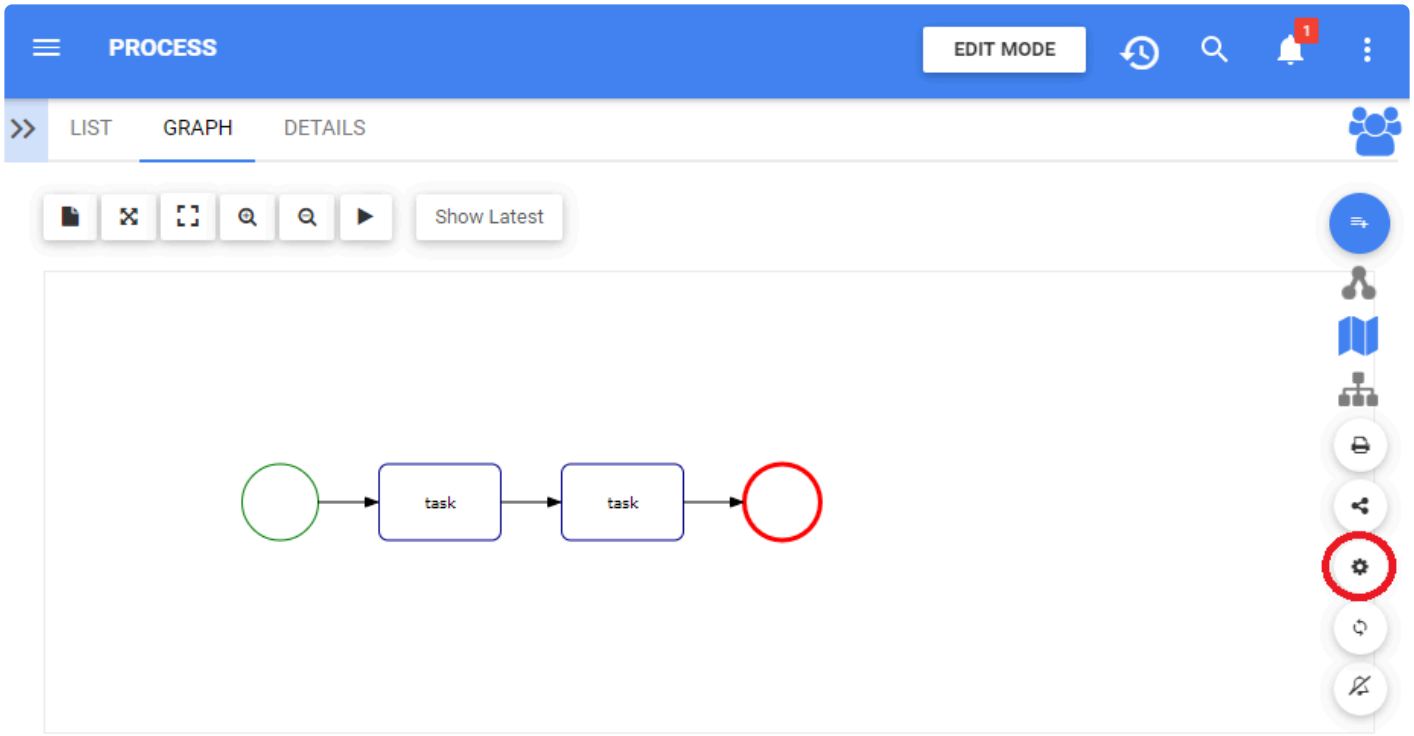
The Options button has been added to allow users to customize the Graphs they view. Customization allows users to select exactly what is displayed in each graph, allowing them to prioritize key information in a format of their choice.

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

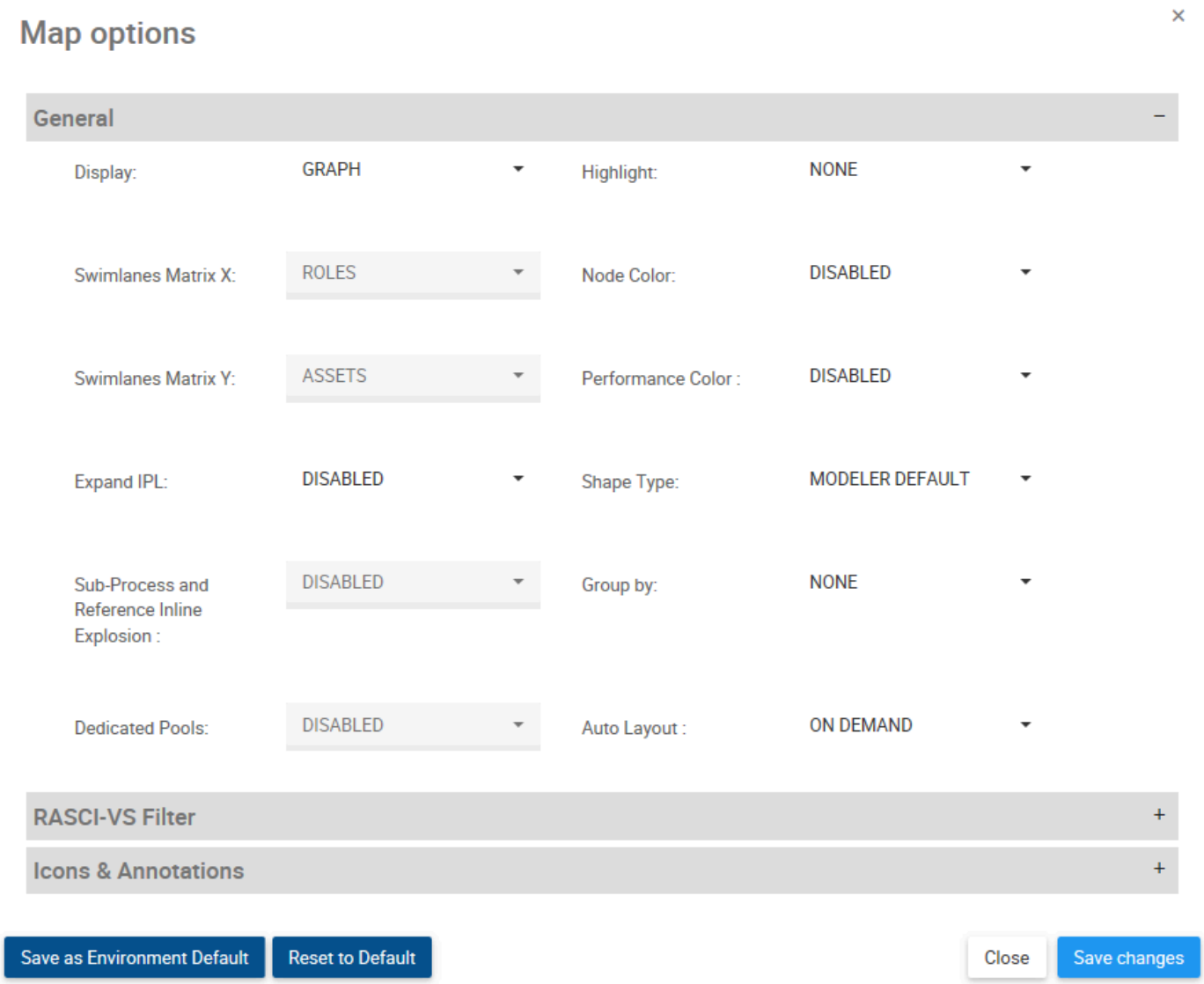
To use the Options button, please see the following instructions

1. Navigate to a process graph within the Process Module

2. Select the Options button at the upper right corner of the page

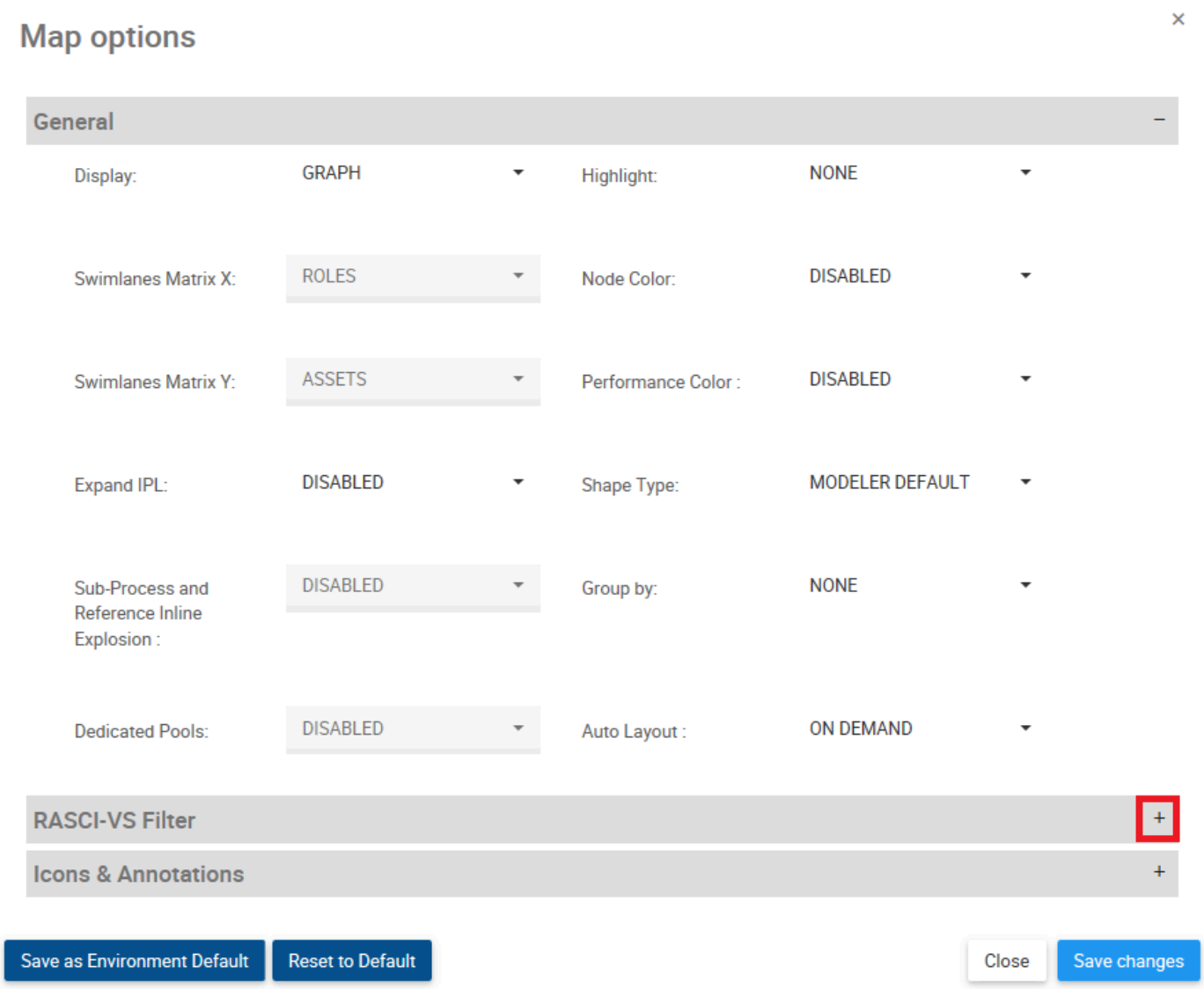


3. The Options panel will be displayed on the screen as shown

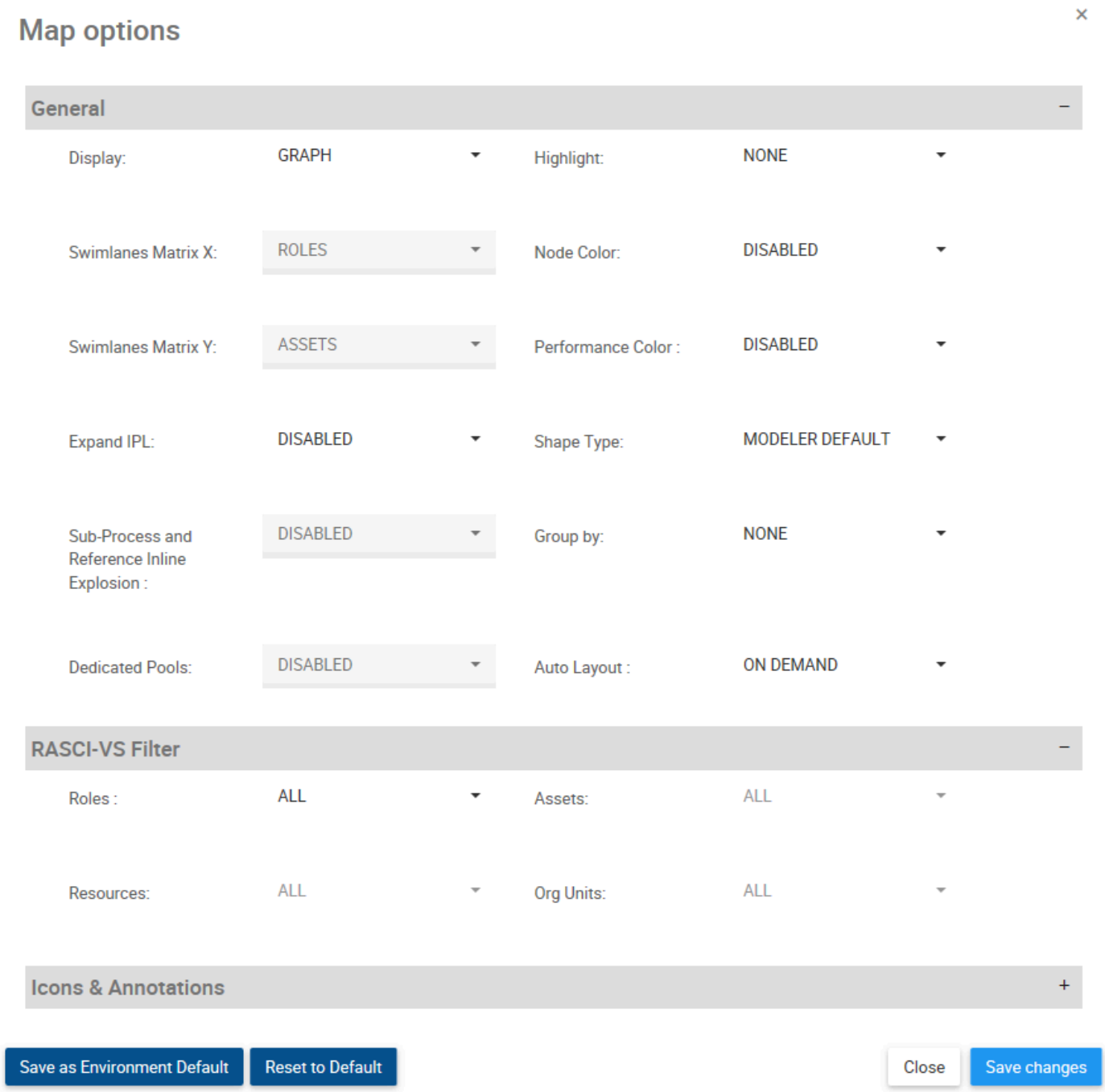


To expand the Options panel, please see the following instructions

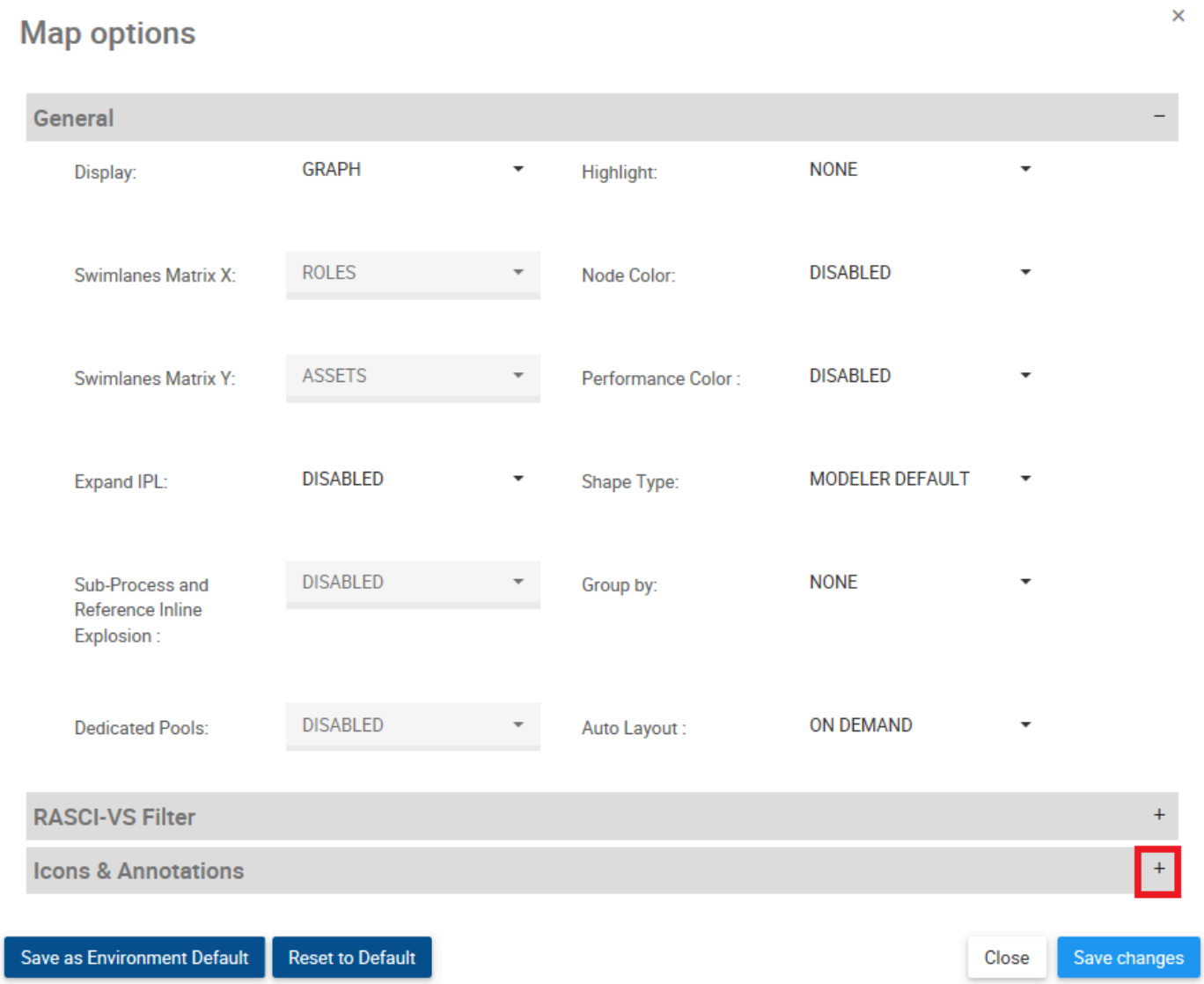
1. To expand the **RASCI-VS Filter** on the Options panel, click on the + icon



2. The RACI-VS Filter Options will be expanded



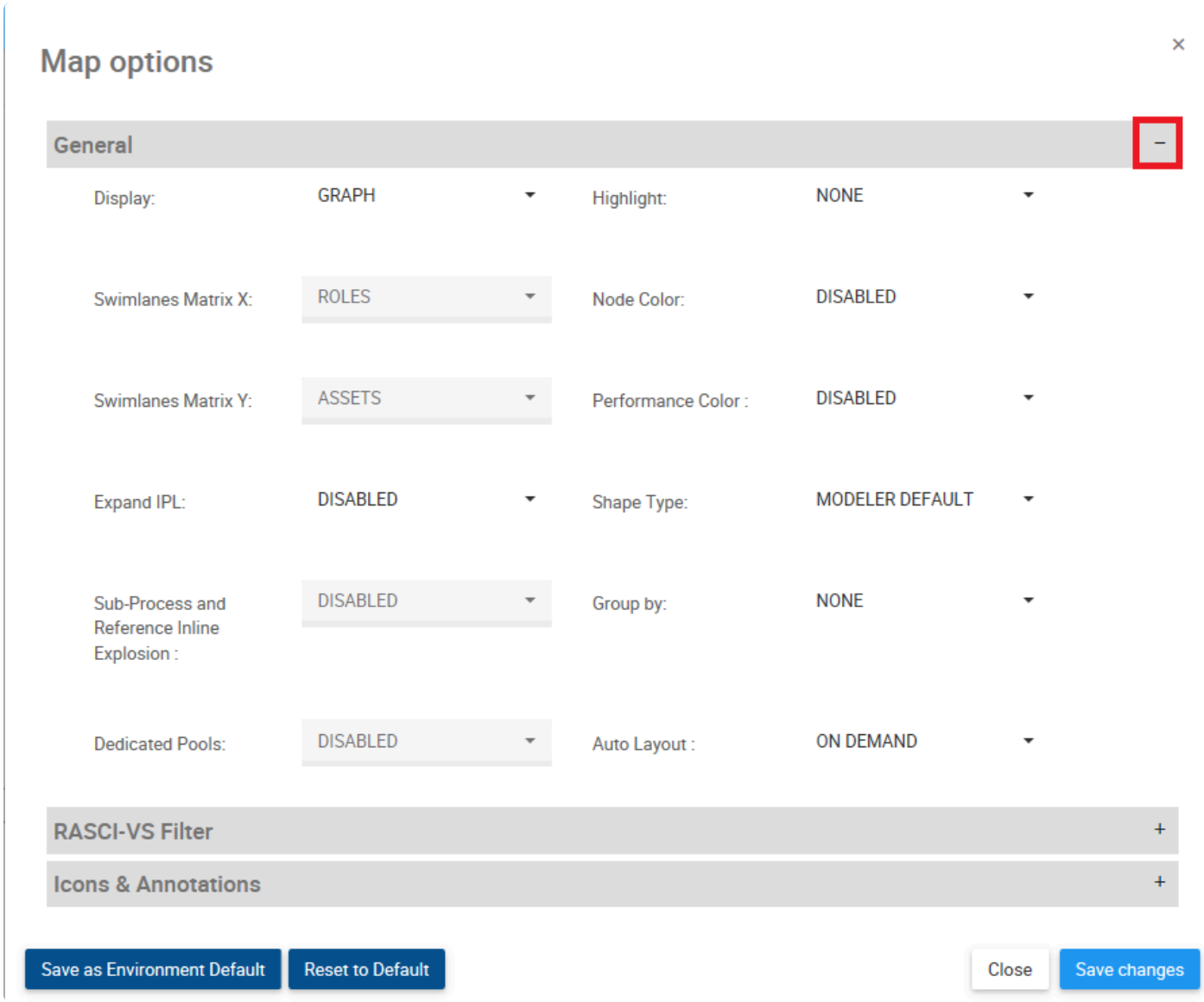
3. To expand the **Icons & Annotations** on the Options panel, click on the + icon



4. The Icons & Annotations Options will be expanded

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.



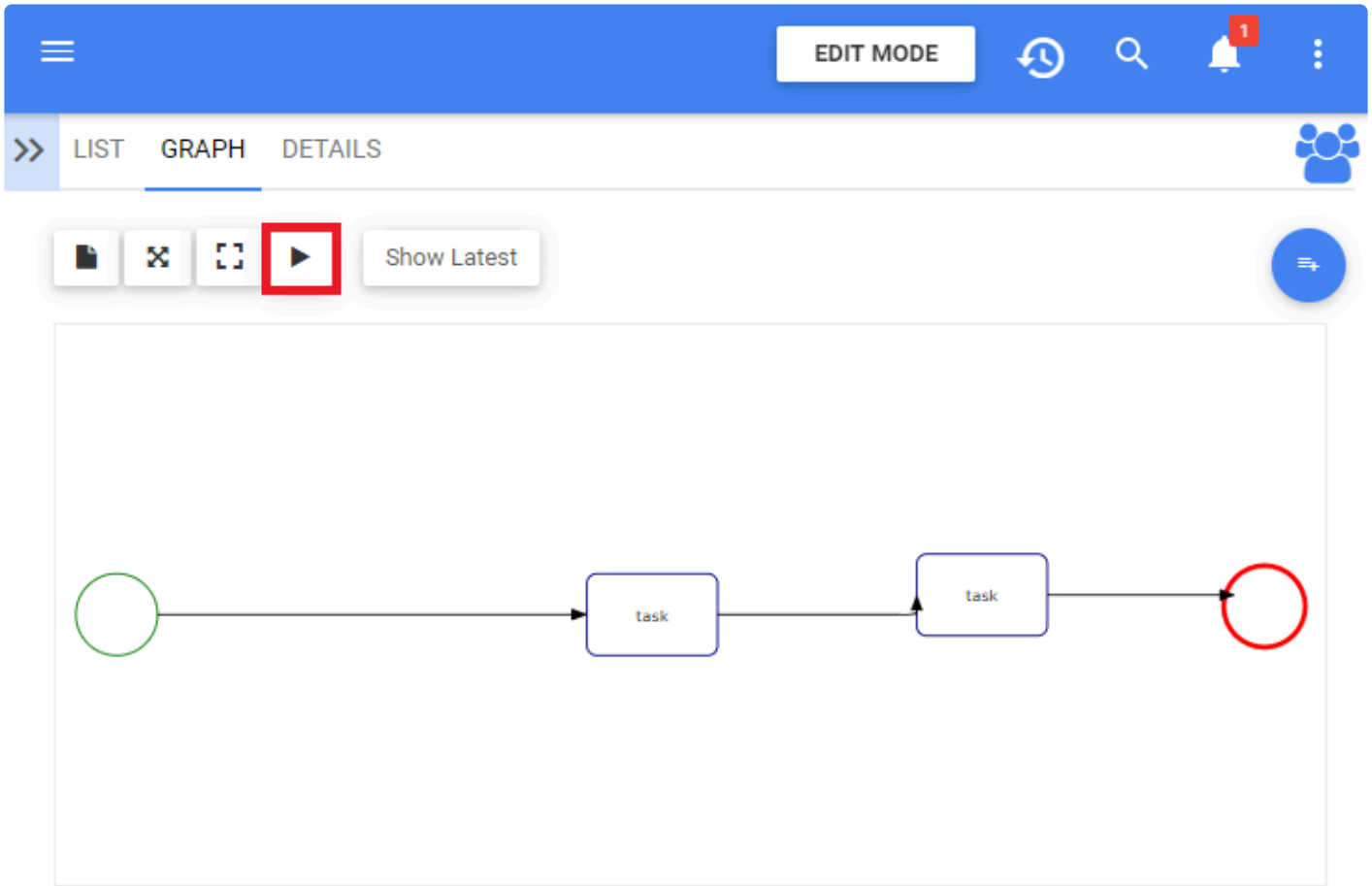
2. The General Options will be hidden

4.4.3.1.1.6 Auto Layout

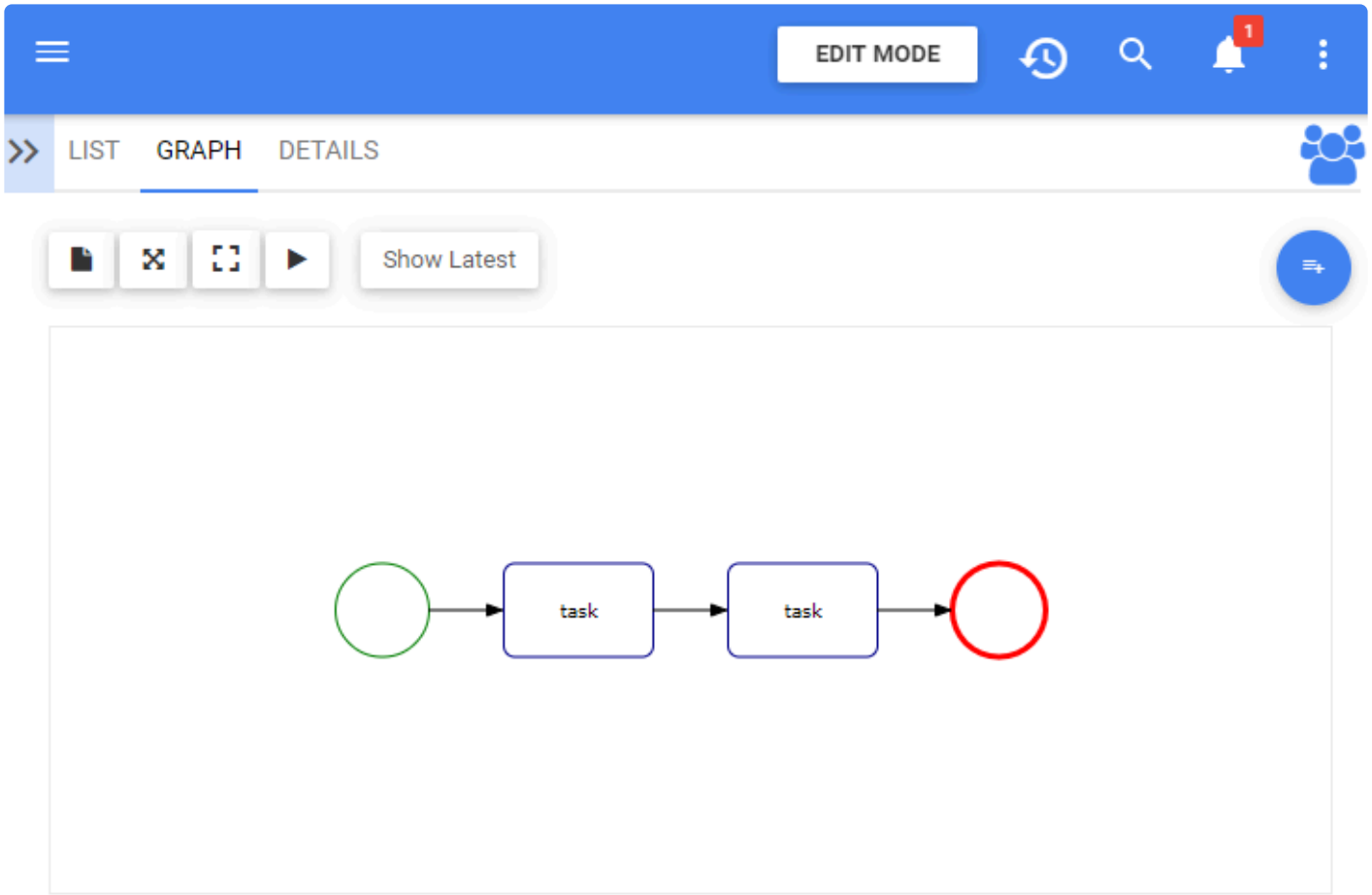
The Auto Layout function has been added to optimize process layout after user editing. To reduce the time consuming process of arranging different items and tasks, the Auto Layout button uses a routing algorithm inbuilt within the EPC to generate a user friendly layout at the click of a button.

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



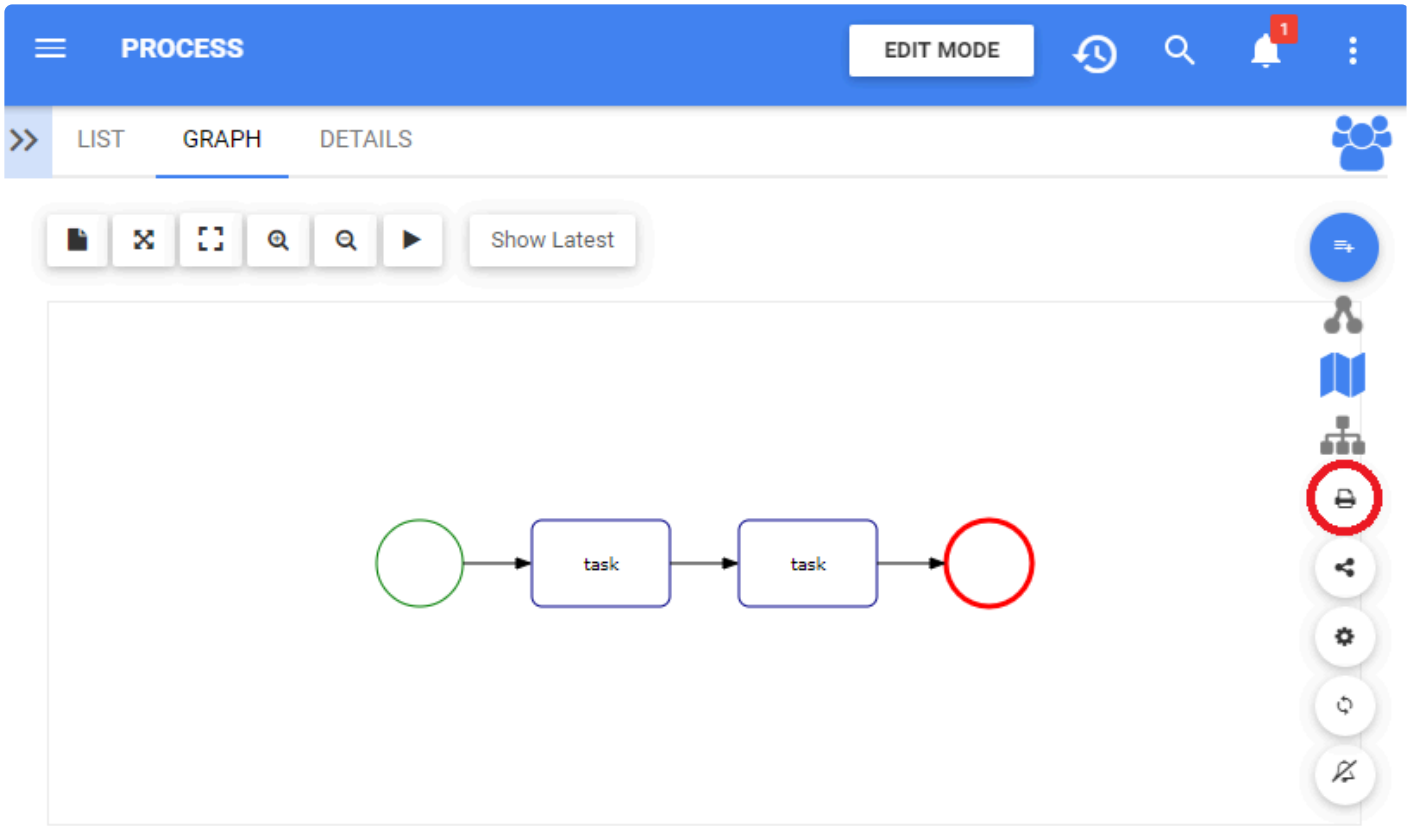
This layout change is a temporary change done to optimize the view of the current graph. These changes are not permanent but are saved by a user locally.

4.4.3.1.1.7 Print

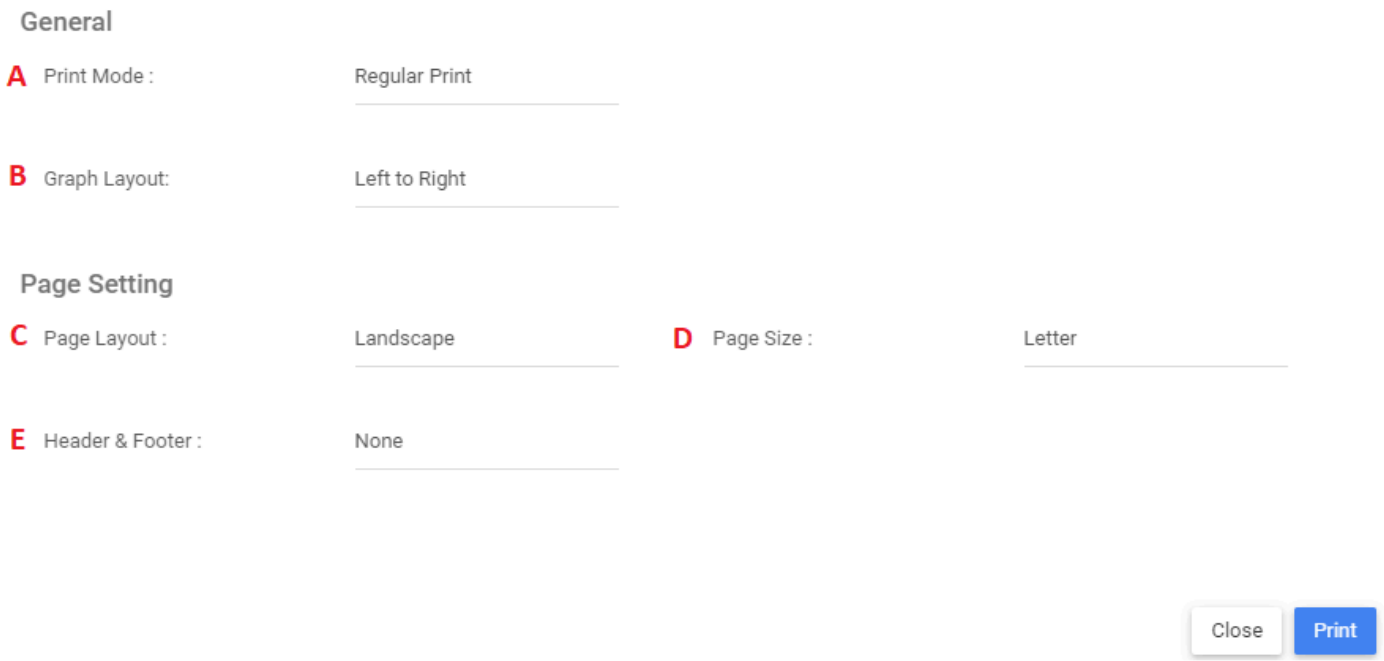
The Print button has been added to allow users to easily print a desired graph.

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



	Setting	Options	Description
A	Print Mode	a. Manual Print b. Dynamic Print	Leaves the map as is Adjusts the map according to settings choices
B	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)
C	Page Layout	a. Landscape b. Portrait	Landscape (“Sideways”) page orientation Portrait (“top-Down”) page orientation
D	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)
E	Header & Footer	a. None b. Header & Footer	No header & footer on the printed page Pre-designed header & footer displayed on the printed page

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

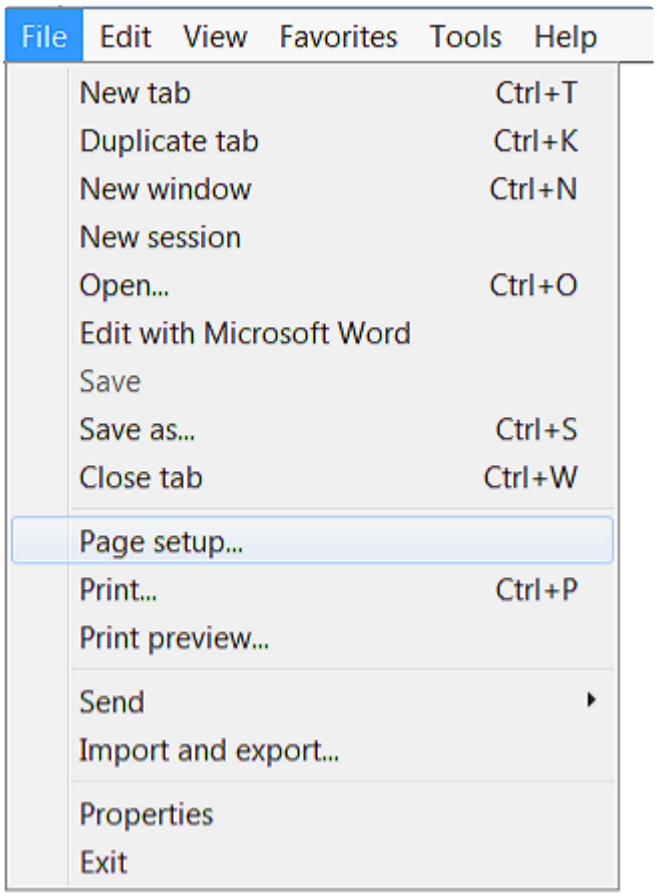
Internet Explorer sets default margins, headers and footers, all of which take up extra space on EPC prints. Consequentially, this can result in:

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

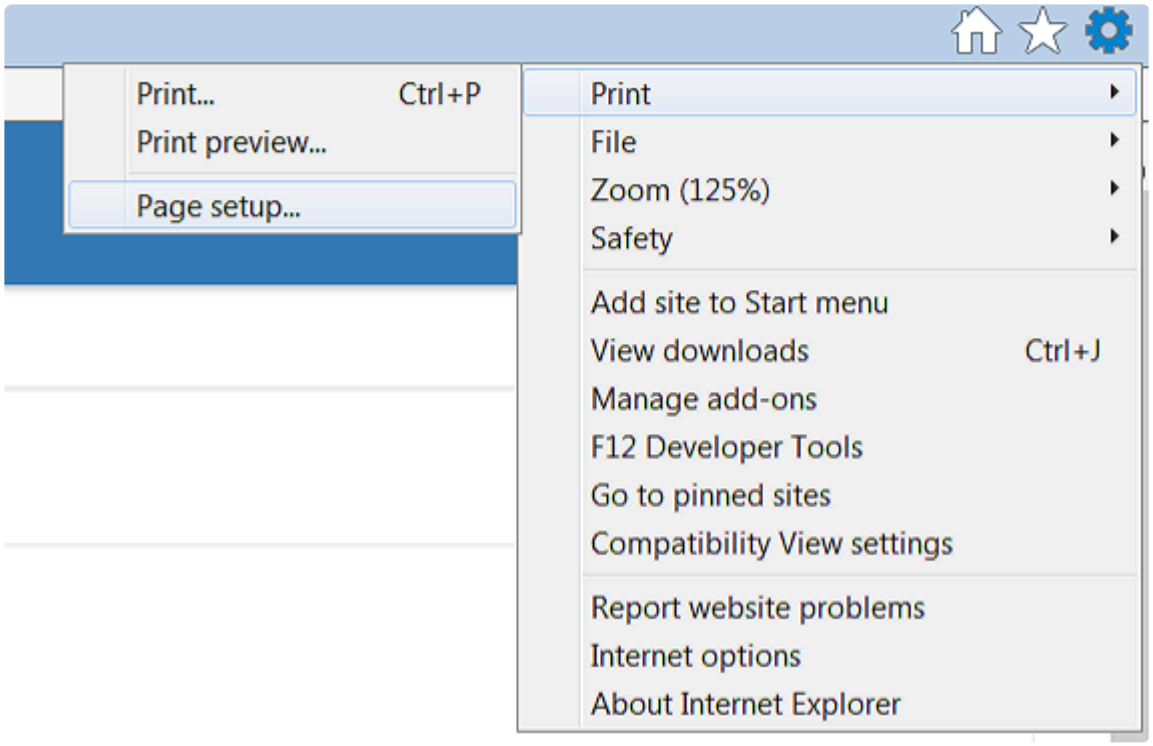
To ensure an optimal print of process maps from Internet Explorer, users must first bypass their browser's Page Setup settings.

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

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

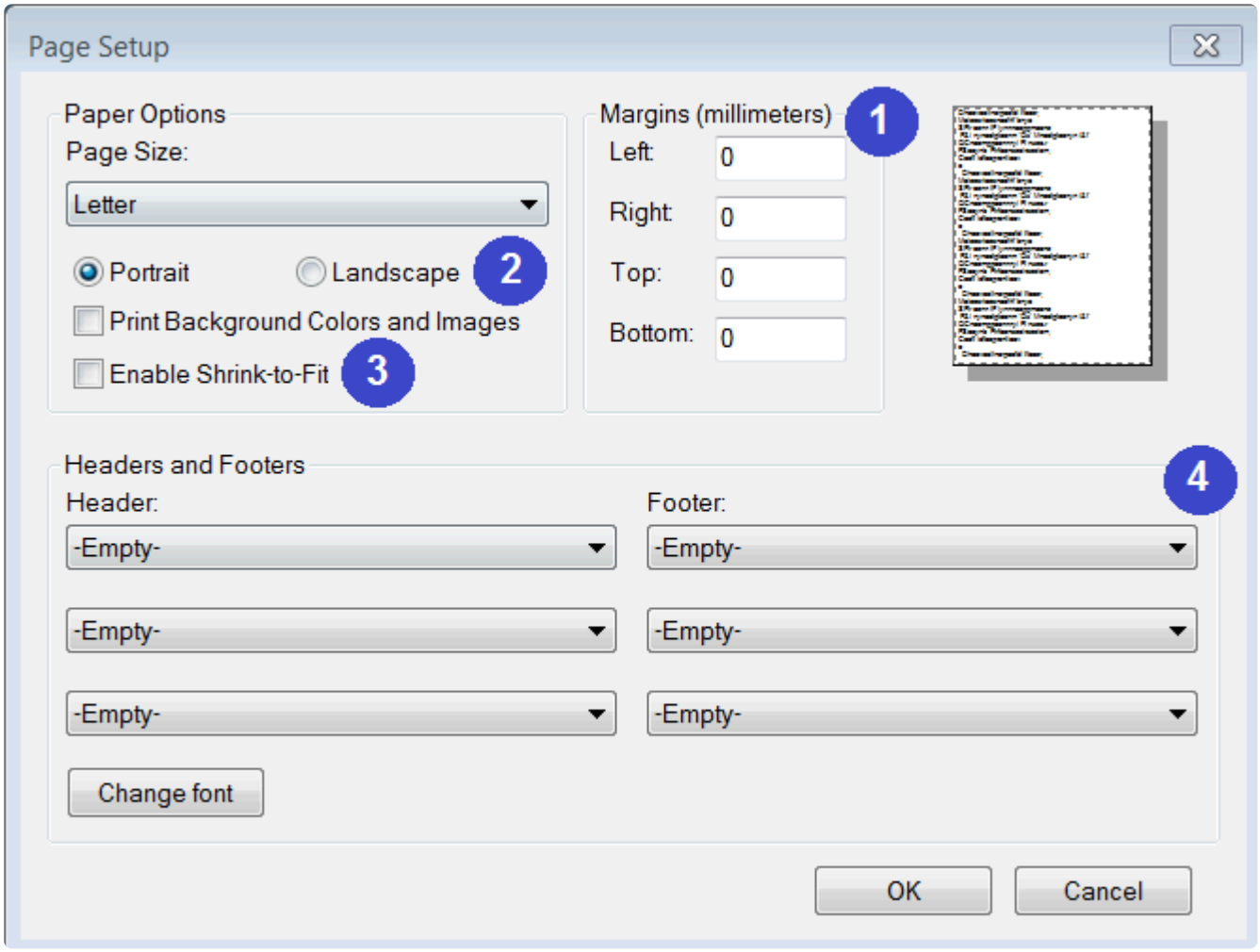


- Alternatively, navigate to the settings button > Print > Page Setup



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



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

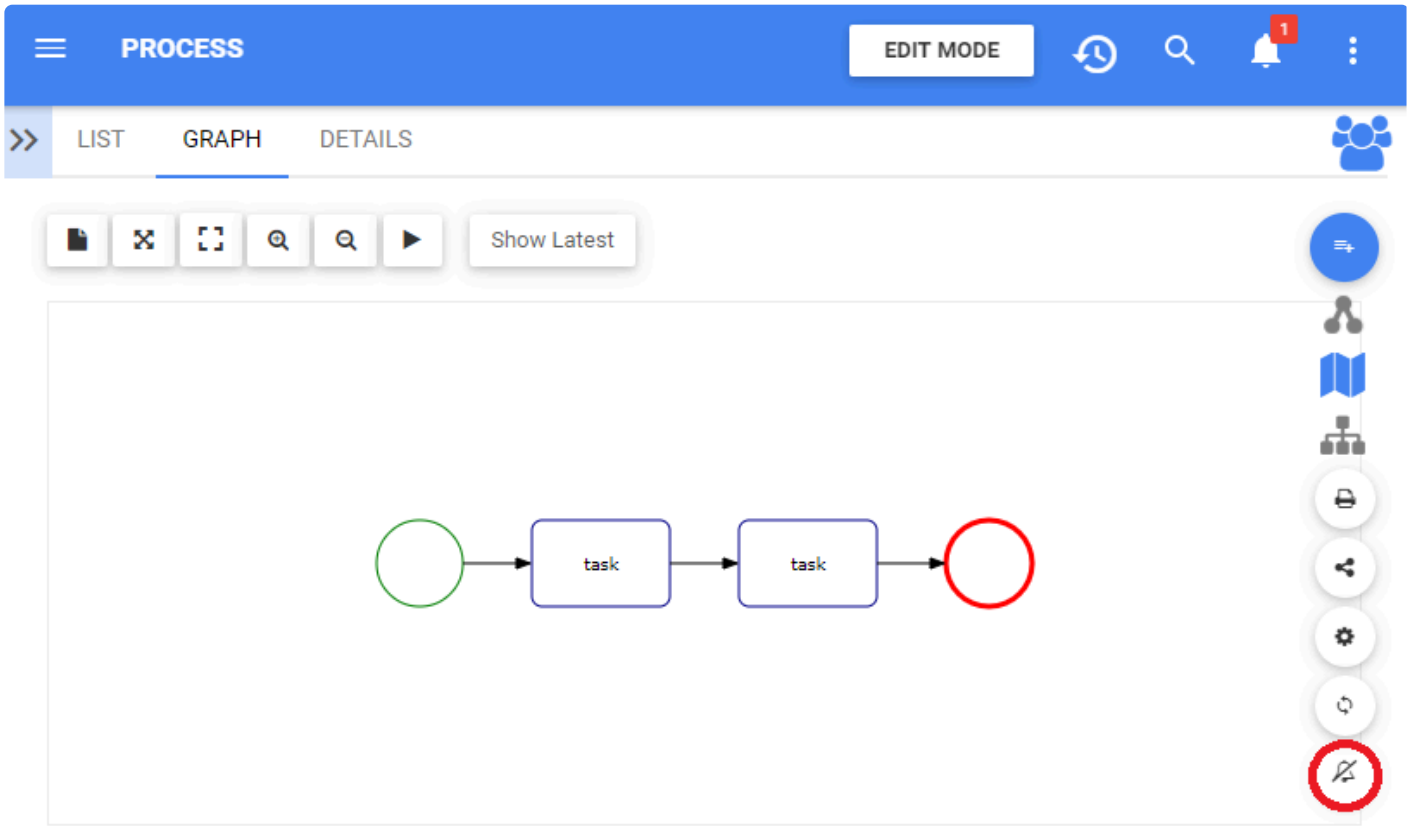
4.4.3.1.1.8 Subscribe

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



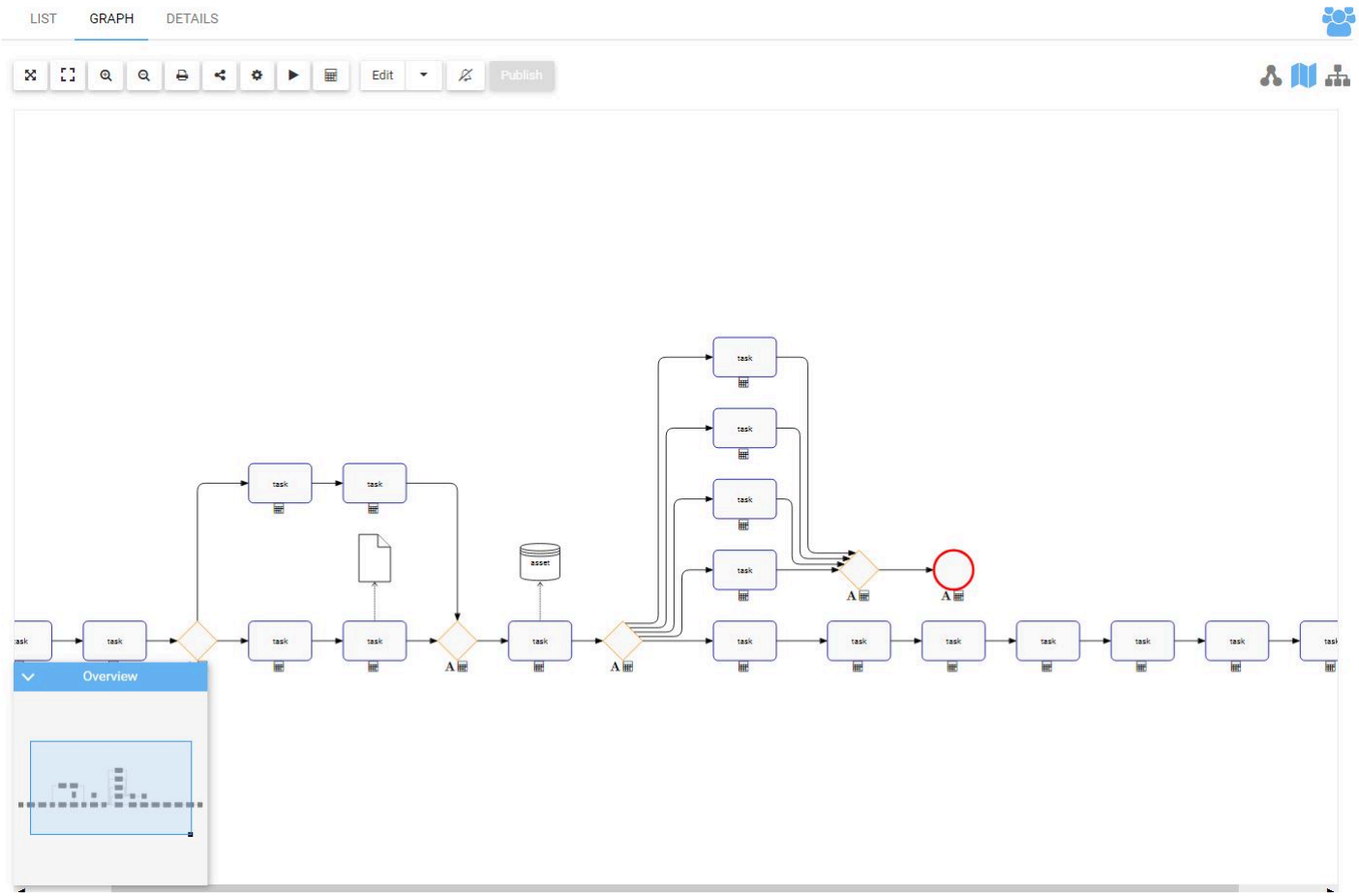
2. The button will change color to , symbolizing that a user is now subscribed to the item displayed on the screen.

4.4.3.1.1.10 Overview Window

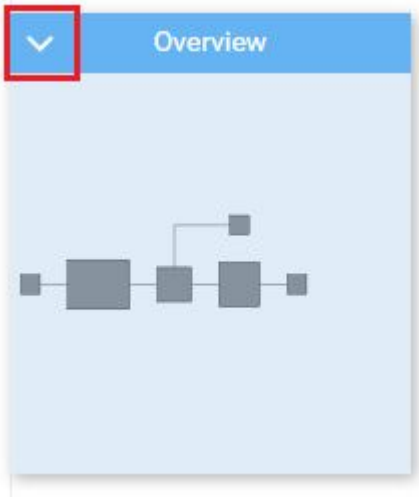
The overview window is available on the bottom right corner of the Graph in both view and edit mode.

> The overview window is not available when comparing changes during approval cycles

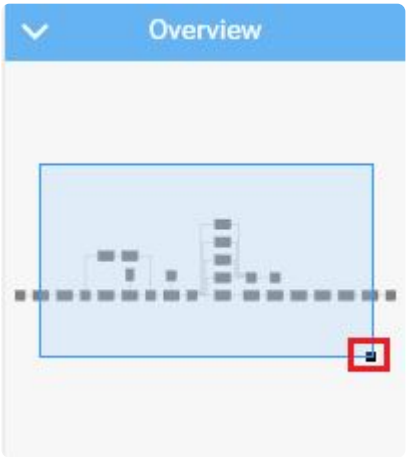
Click and drag the rectangle within the overview window to move your viewing window.
You can also click anywhere within the overview window to center the rectangle to the clicked location.



To collapse or expand the window, click on the arrow on the left side of the Overview Window



To zoom in using the overview window, resize the viewing window by clicking and dragging the bottom right corner of the rectangle



4.4.3.1.1.11 Localize (View local copies of processes)

Localization refers to the practice of adjusting a process' properties and characteristics to accommodate differences in location, product or service. Localizing is useful when processes are very similar, but have slight differences due to location, type of product or service. The EPC allows users to create local copies of a process, and designate those copies by location or product and service.

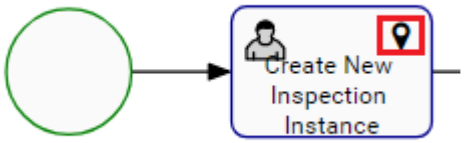
A process can have localized copies associated to it. Users can switch between the source process and the localized process by using the Show Local drop down. Note that if no localized copies exist, the drop down will not be visible.

Accessing a Local Copy

To toggle between local copies, click on

. A drop down of all created localization copies will appear.

To view the localized copy, simply click on the localized process. You will be redirected to the localized process.

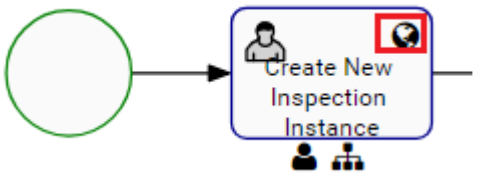


Tasks, Sub-processes and Shortcuts which have been localized will appear with a map marker icon on the top right corner. The map marker icon indicates that this is a localized flow object. Note that if you add flow objects after the local copy was created, these new shapes will not have the icon, since they do not exist in the source and therefore are not localized flow objects.

The process you are currently viewing will be highlighted in the drop down menu.

Switching back to a Source Process

To switch back to a source process, follow the same steps above, but click on “Source Process” in the drop down menu. You will be redirected to the source process.



Tasks, Sub-processes and Shortcuts which have a source will appear with a globe icon on the top right corner. The globe icon indicates that this is a source flow object, and that it has a localized version. Note that if you add flow objects after creating a local copy, these new shapes will not have the icon, since they have never been localized and therefore are not source flow objects.

Tree Menu Behaviour

As you view a local copy of a process, the tree menu to the right will also update accordingly. For example, navigating to the USA version of “Invoicing” will update the tree menu to display the appropriate version.

Notice that “Invoicing” in the tree is also marked with the localization icon. “Process Payroll” is marked with a globe, indicating that it is a source process. However, “Process Payroll” does not have any local versions related to USA, and therefore will show the source version.

The entire tree will show all local copies associated with that localization attribute. For example, if multiple processes have a CAN localized version, they will all be shown in the tree menu. In the image below, we switched to the CAN version of “Invoicing”. It so happens that Process Payroll also has a CAN local copy.

Remember that the source process will be shown for processes that do not have a localized copy for that particular attribute. If a process has no localization at all, then the normal, unlocalized process will always be shown.

To switch the tree menu back to default, navigate back to a source process while viewing a localized process, or refresh the page while on a source process.

You will be redirected to the source process. The tree will also now show the source version for all processes.

Moved Localized Processes

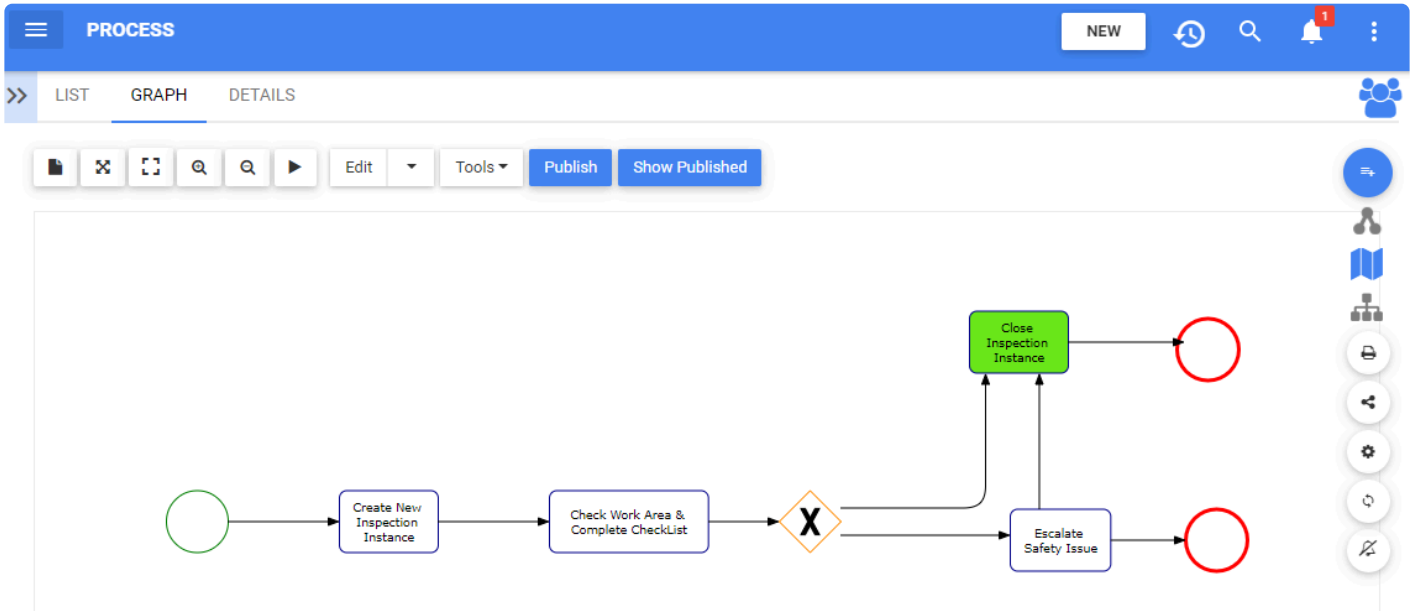
In the event a localized process is moved away from its source (i.e the source process and the localized process no longer share the same parent), the localized process will always be shown regardless of the context. If a specific process appears in the tree and in the map as always the localized version, then it has most probably been moved away from its parent.

For more information on move, click here.

4.4.3.1.1.12 Process Synchronization

Process Synchronization allows your global users to easily and seamlessly collaborate within the application. By using the Synchronize feature, your users can visualize and walkthrough processes together, viewing the content they need to understand their processes.

Users can select the synchronize icon , and once they have done so, other participants can select synchronize and follow the original user as they manipulate the process.

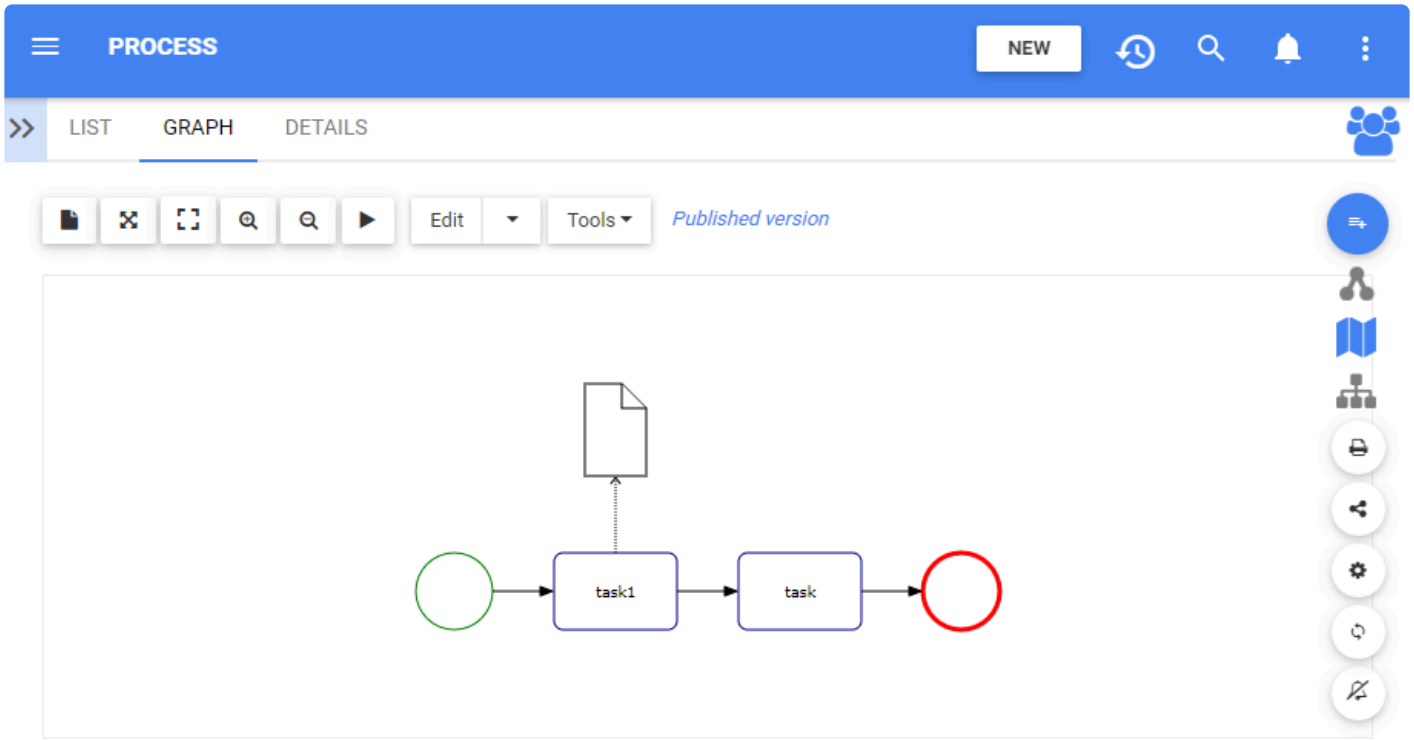


4.4.3.1.1.13 Share

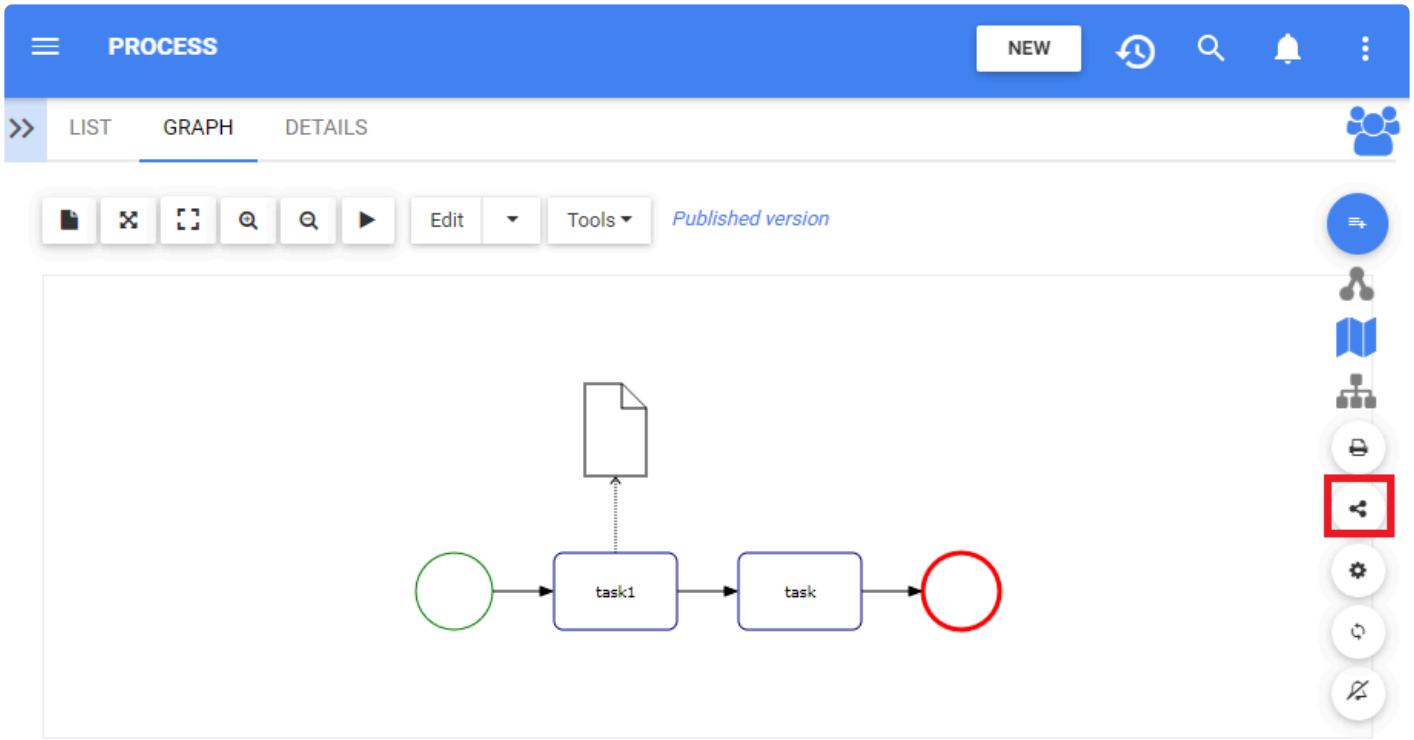
The share function has been implemented to allow user to copy the process url and share it with another user.

To use the Share function, please see the following instructions.

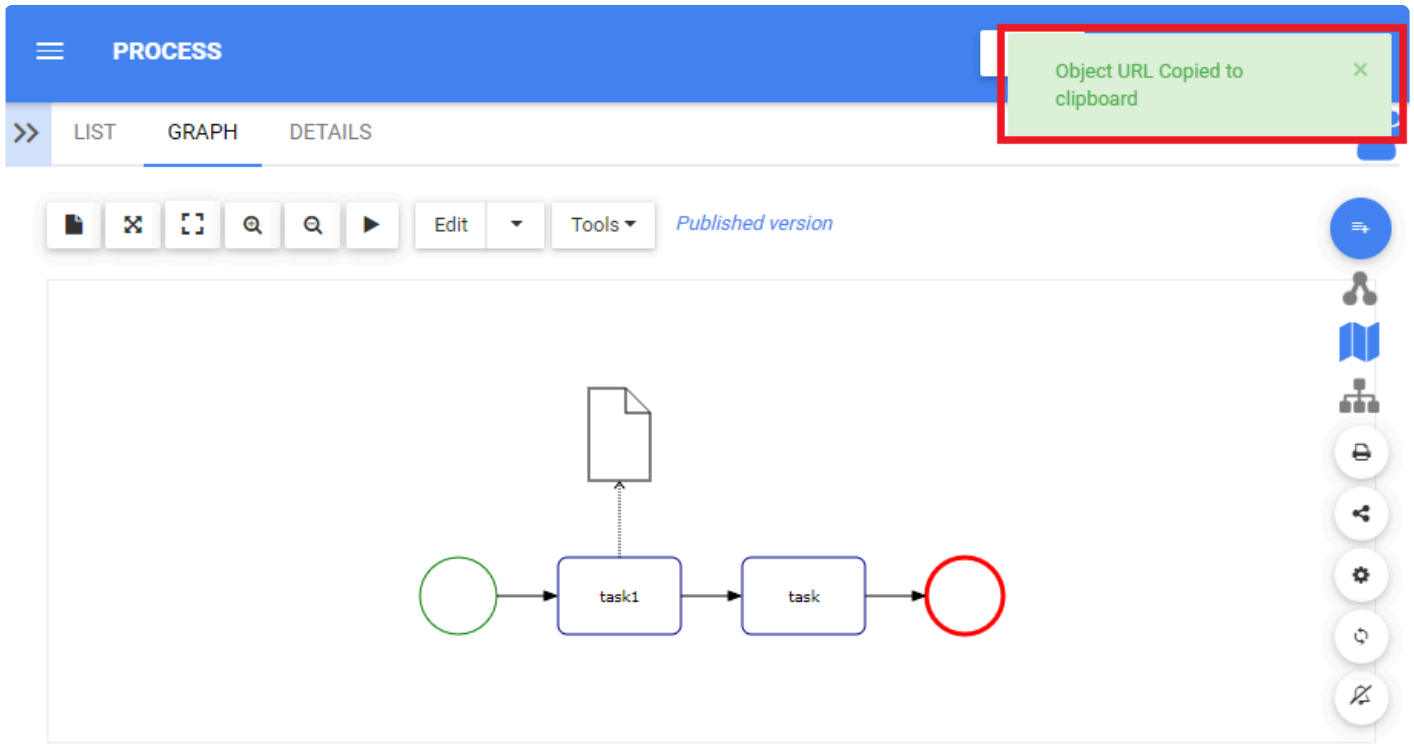
1. Navigate to the Graph tab



2. Select Share in button at the upper left corner of the page



3. A message will appear that the object url has been copied to clipboard

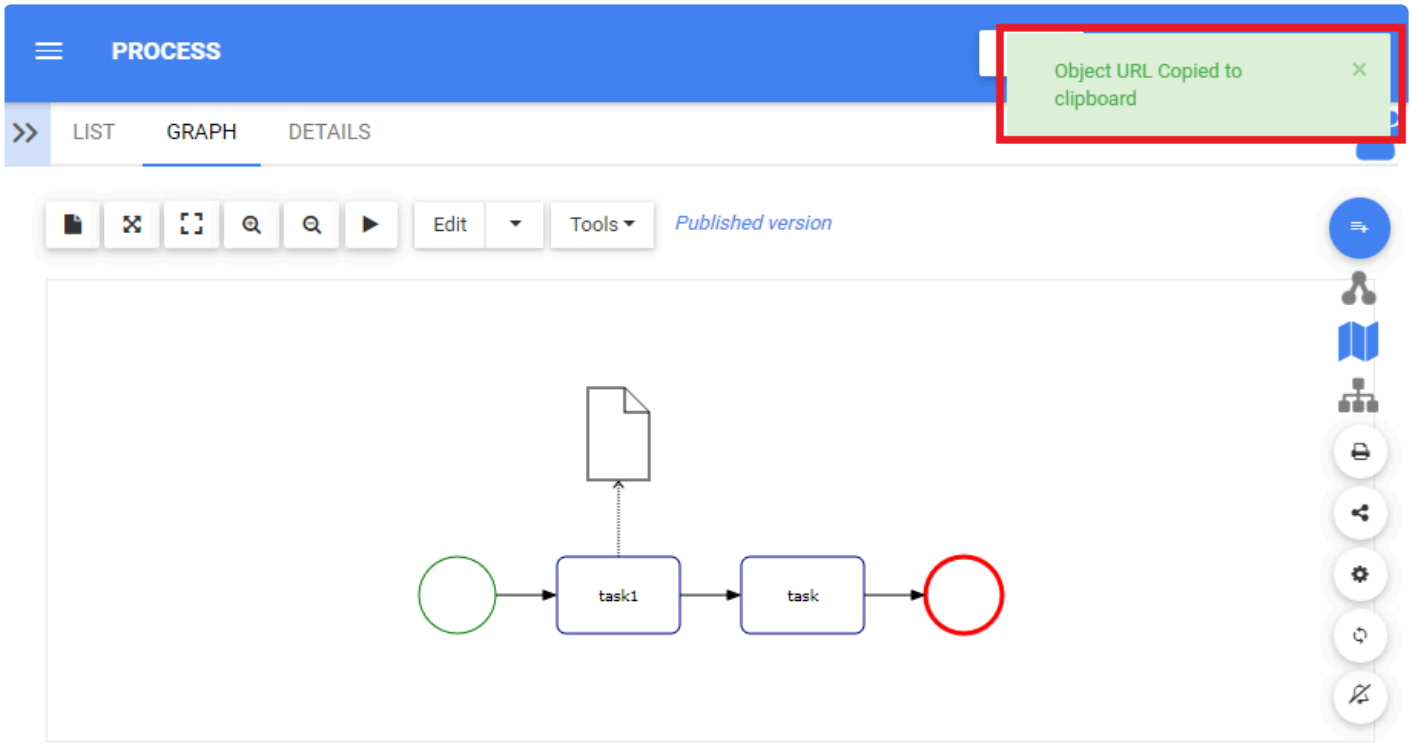


4.4.3.1.1.14 Sync

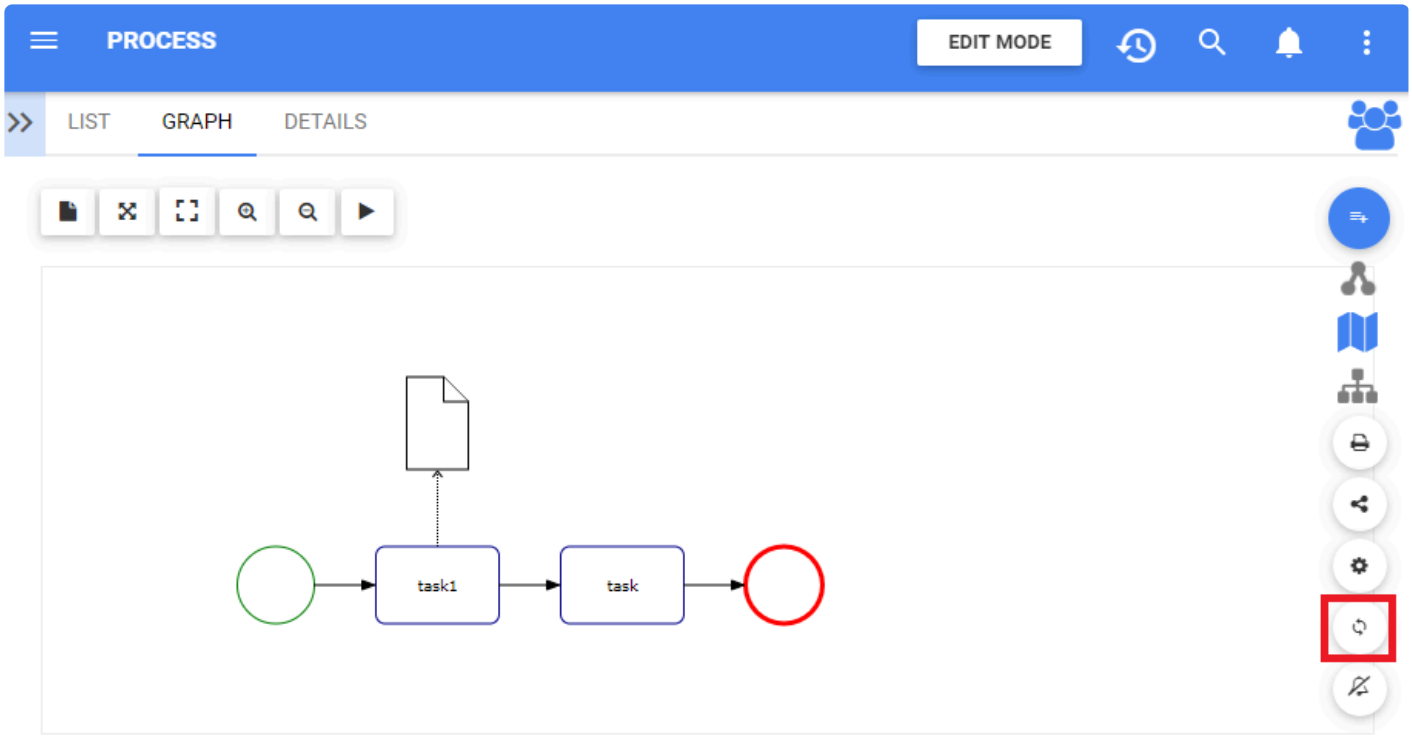
The sync function has been implemented to view any changes done to the process graph when another user finished editing the graph.

To use the **Sync button**, please see the following instructions.

1. Navigate to the Graph tab



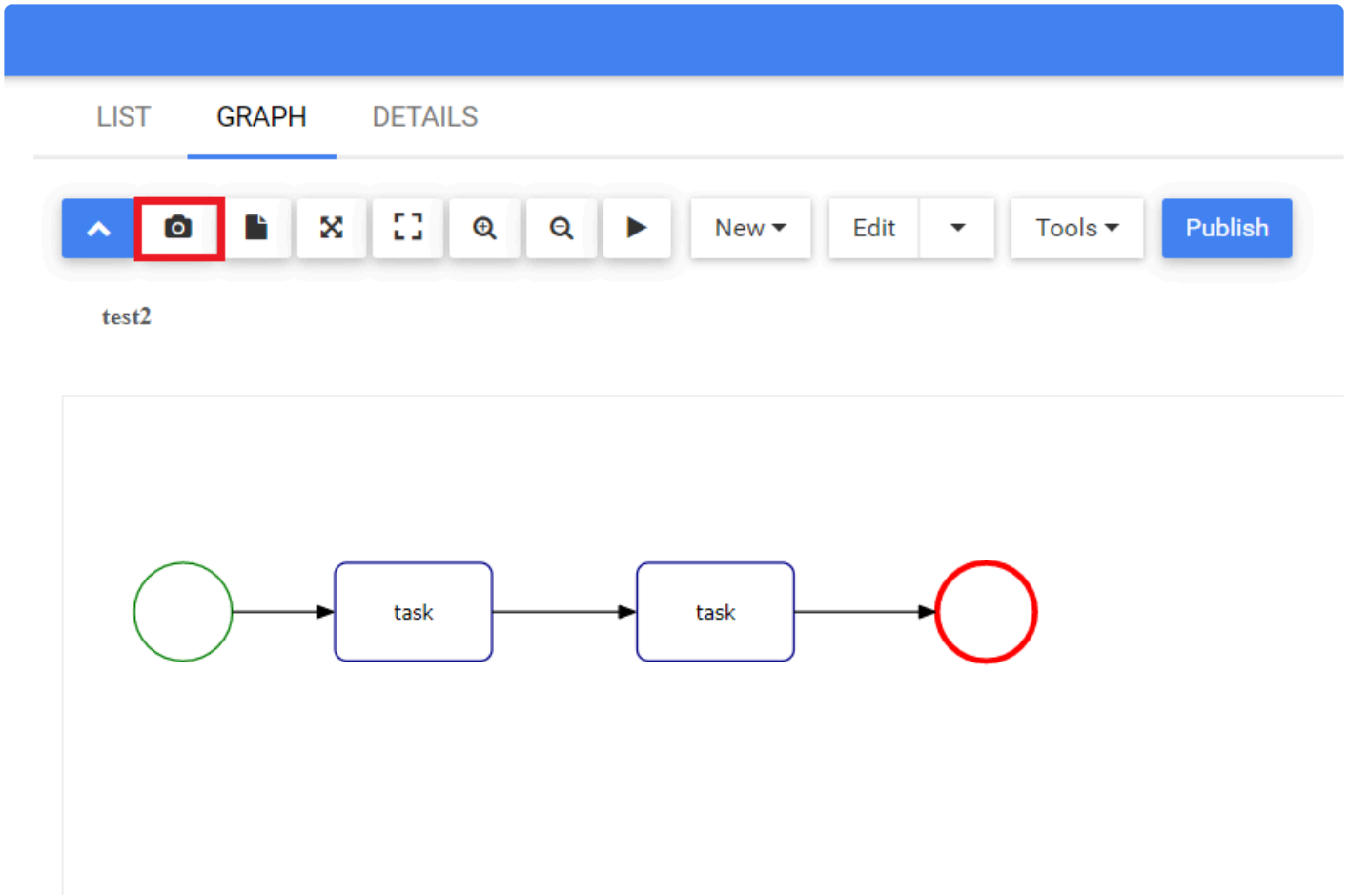
2. Select the sync button in the button group located to the right corner of the page


PROCESS
EDIT MODE
LIST
GRAPH
DETAILS
task1
task

4.4.3.1.1.15 Download

The process map capturing feature has been implemented to assist user in downloading their desired graph. Selecting the download button will prompt the graph to be directly downloaded onto a user's device, which can be used for offline viewing.
To use the Download button please see the following instructions.

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



2. The image will get downloaded in your system with .png extension

4.4.3.2 Map Graph

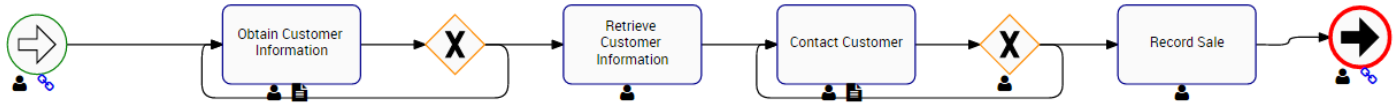
A Map graph represents the typical pictorial view of a business process. It is the most common process viewing format, displaying the process in typical BPMN format. This process view allows users to view business processes, associated activities and items. The EPC provides the following Map view formats:

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

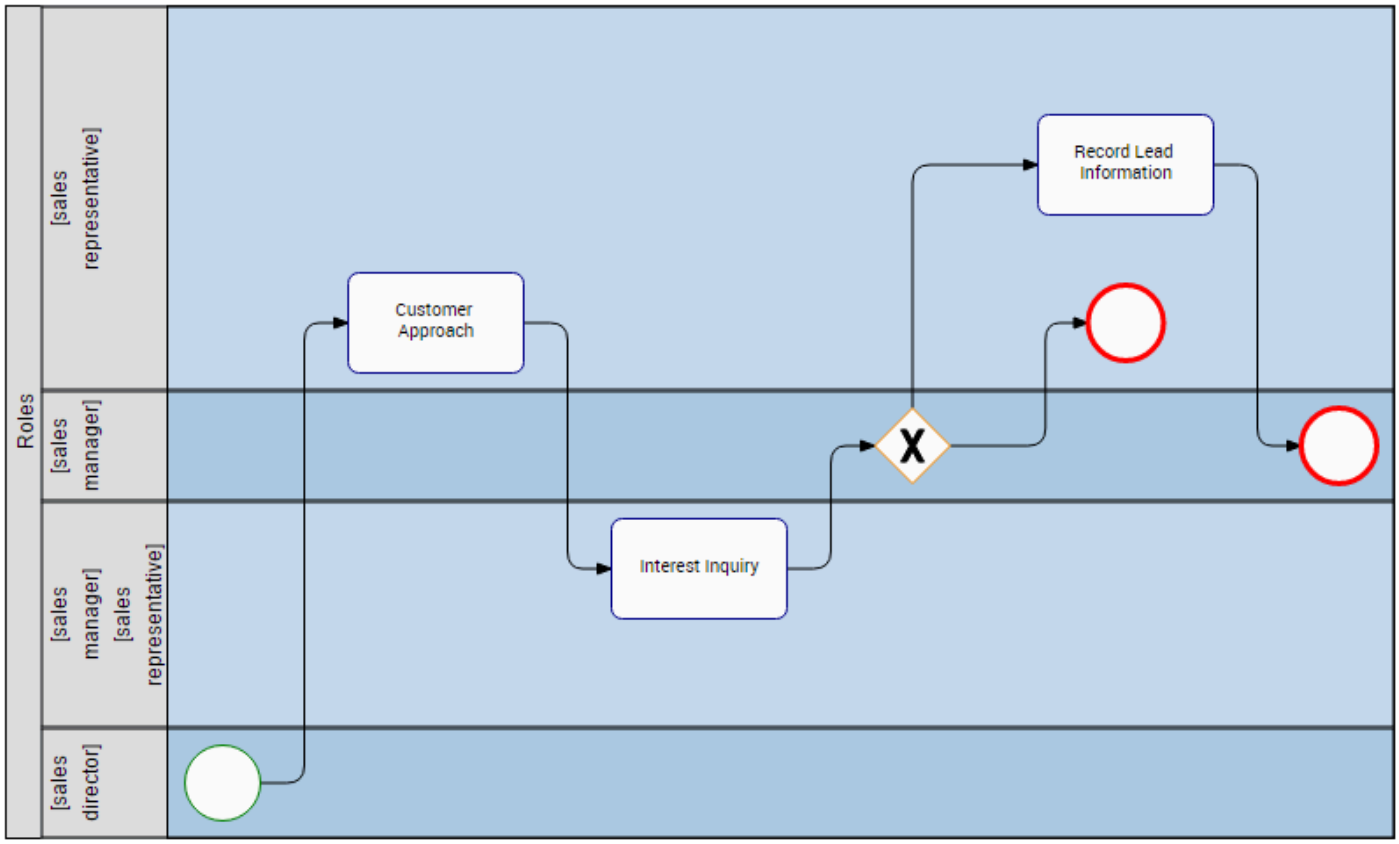
Graph view allows users to view processes following the traditional flow-chart format. This provides users with a high-level view of a business process, outlining key activities and the key items associated with each task.



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.

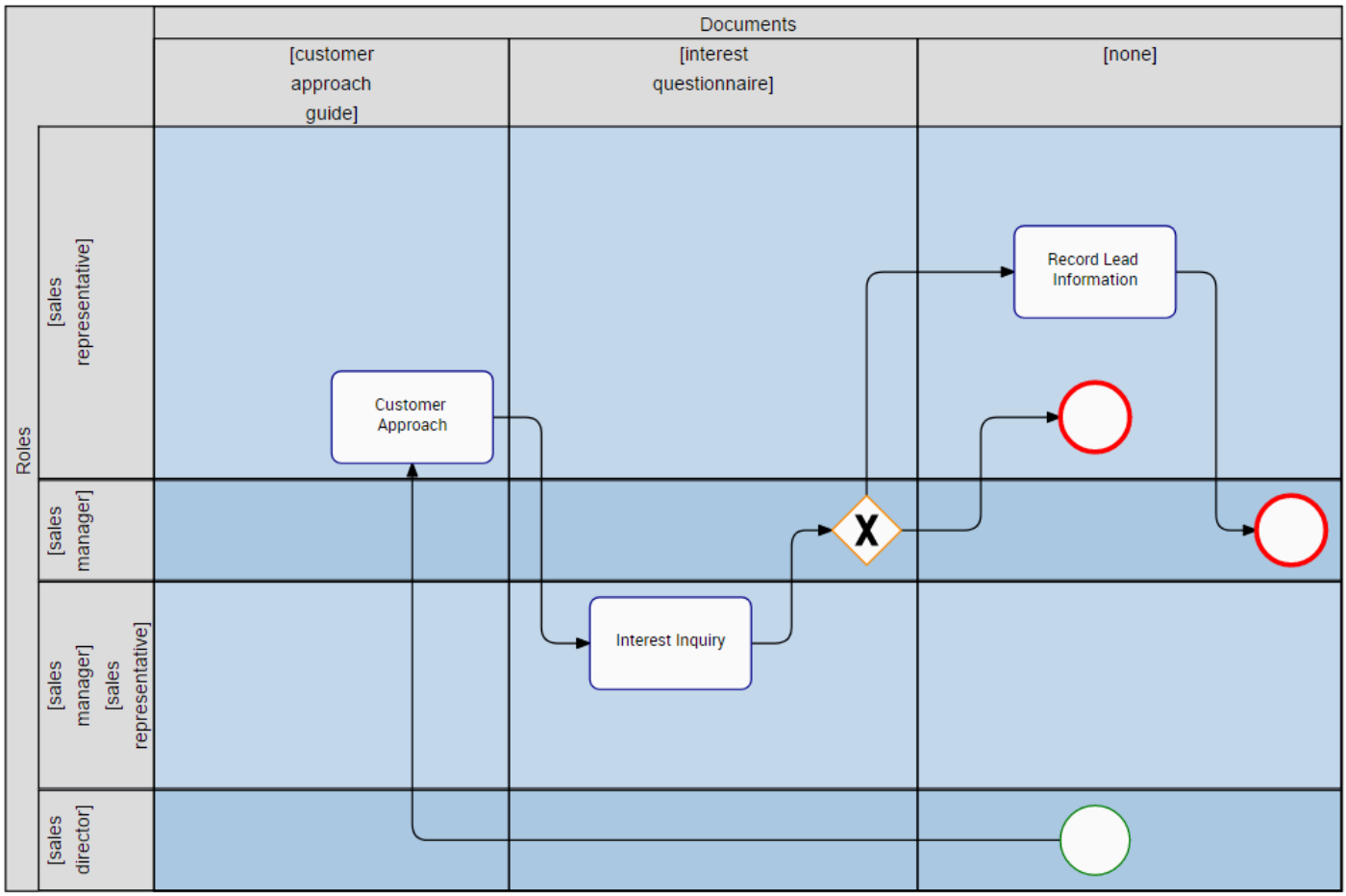
The following Items can be set on the axis:

1. Analysis
2. Annotations
3. Assets
4. Attributes
5. Boundary Events
6. Categories
7. Controls
8. Description
9. Documents
10. Entities
11. Event & Gateway Name

12. IPL
13. KCI
14. KPI
15. KRI
16. Materials
17. Objectives
18. Org Units
19. Resources
20. Risks
21. Roles
22. Rules
23. Services

4.4.3.2.3 Matrix Swimlanes

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



The following Items can be set on the axes:

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

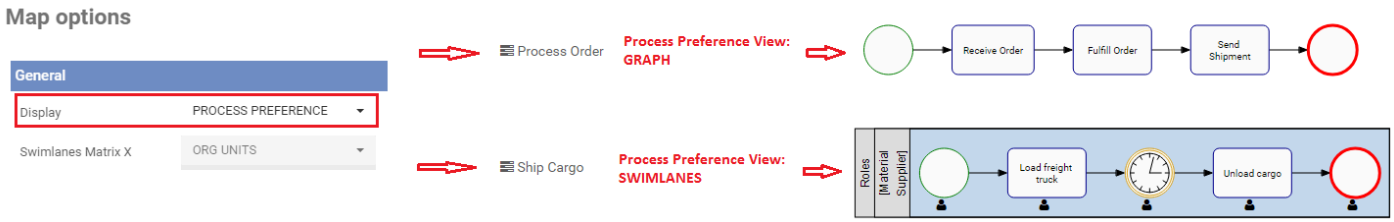
The Process Preference View is based on the preferred view for each specific process.

Each process has its individual properties, like name, process description, sequence number, etc. Similarly, each process also has its own BPMN properties. Process modelers are able to set these BPMN properties. More specifically, they can set the preferred view for that process to be either in Graph, Swimlane or Matrix Swimlane. This allows users to view different process maps in a different mix of display modes, as opposed to viewing all maps in Graph, Swimlane or Matrix Swimlane.

The default process preference view is Graph

For more information on setting a preferred view for a specific process, click here.

By selecting Process Preference as the Display View, the EPC will go look into the process' BPMN property and will display the process map according to the preferred view of that process.

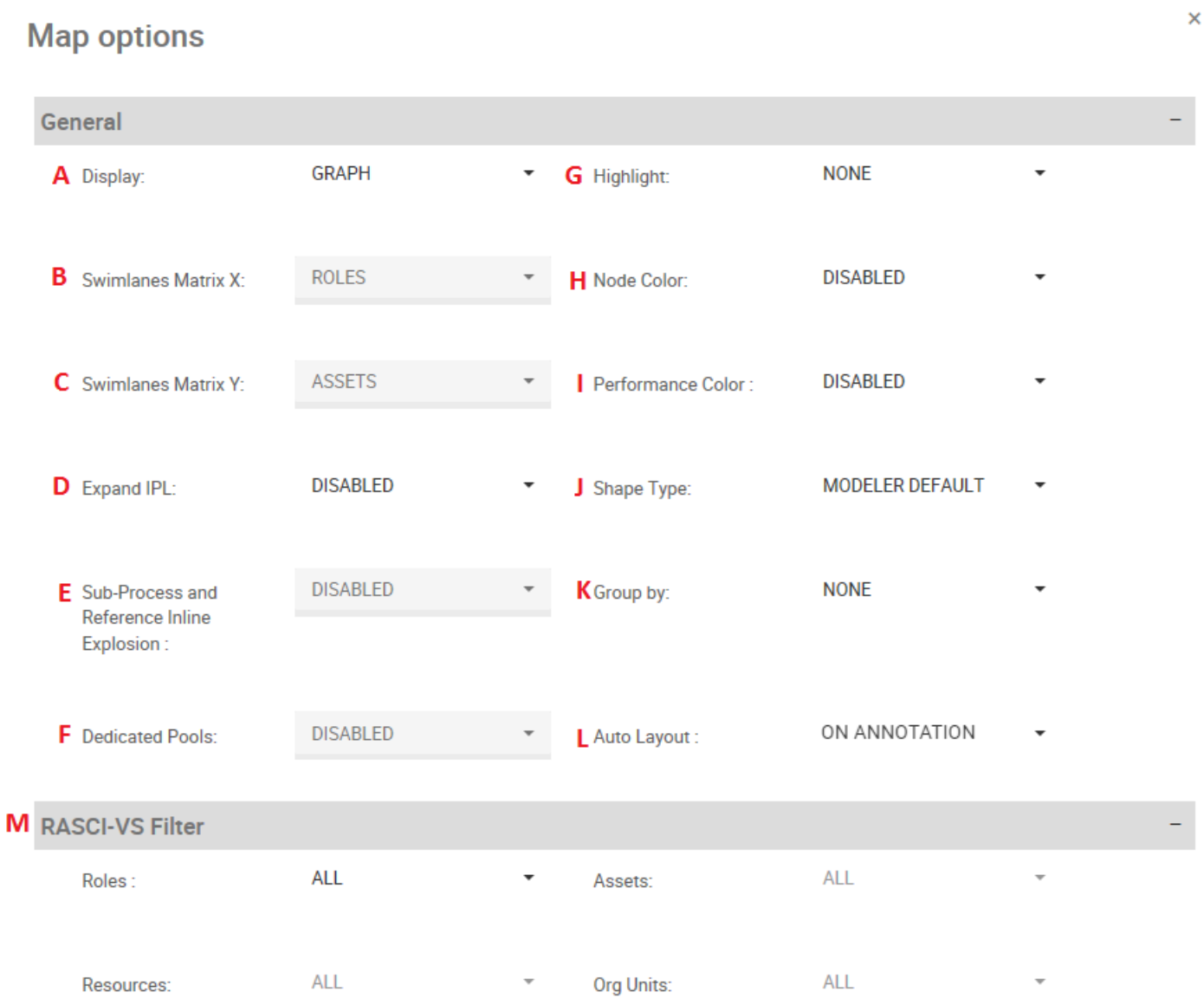


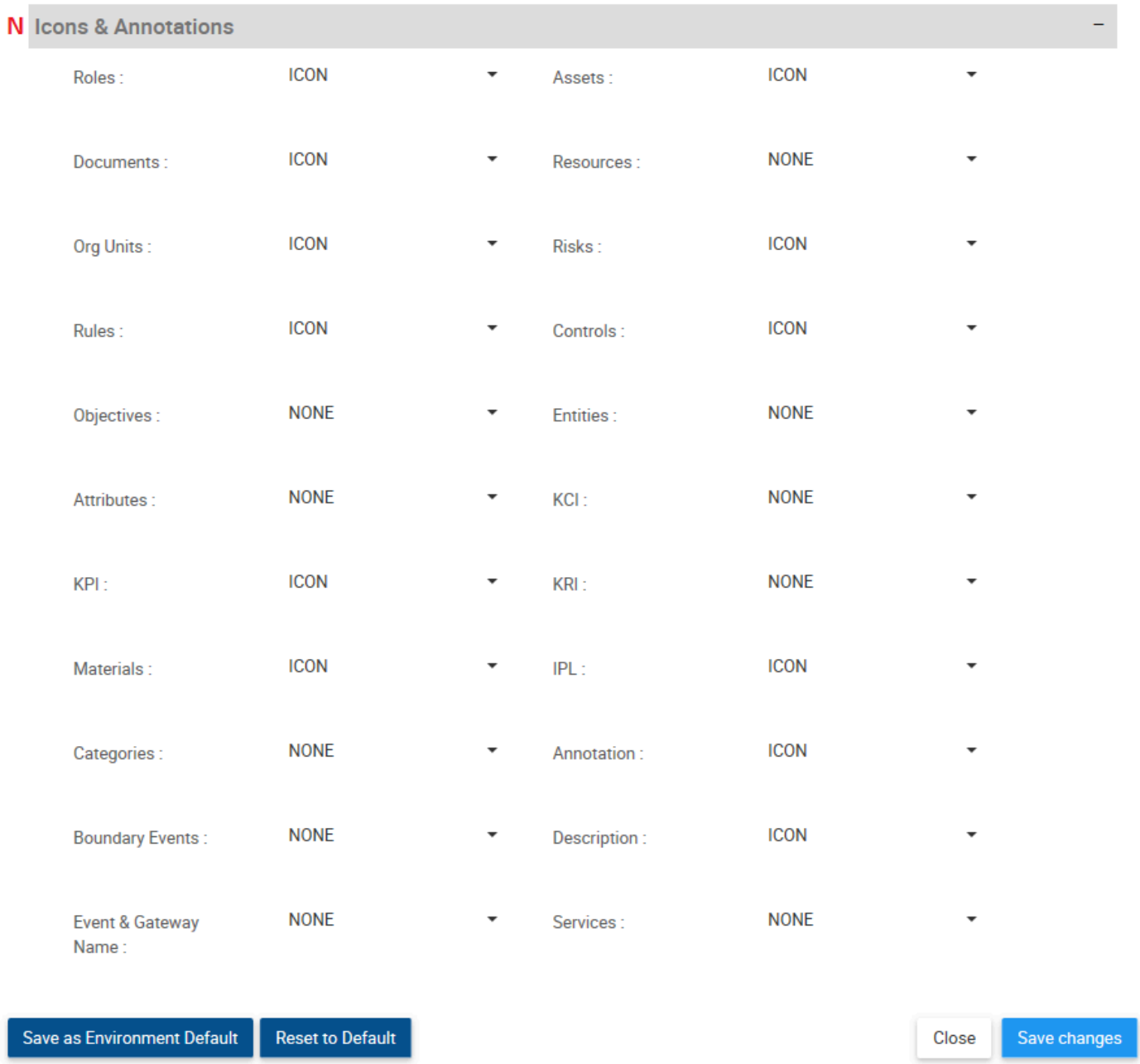
In the example above, "Process Order" has its BPMN property of "Process Preference View" set to Graph, while "Ship Order" has its BPMN property of "Process Preference View" set to Swimlanes. While the user is on the Process Preference View, when navigating between those 2 processes, they will be displayed in Graph and Swimlane, respectively.

4.4.3.2.5 Map Options 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





Item	Setting	Purpose
A	Display	Allows users to toggle between Graph formats (Graph View, Swimlanes, Matrix Swimlanes, Process Preference)
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

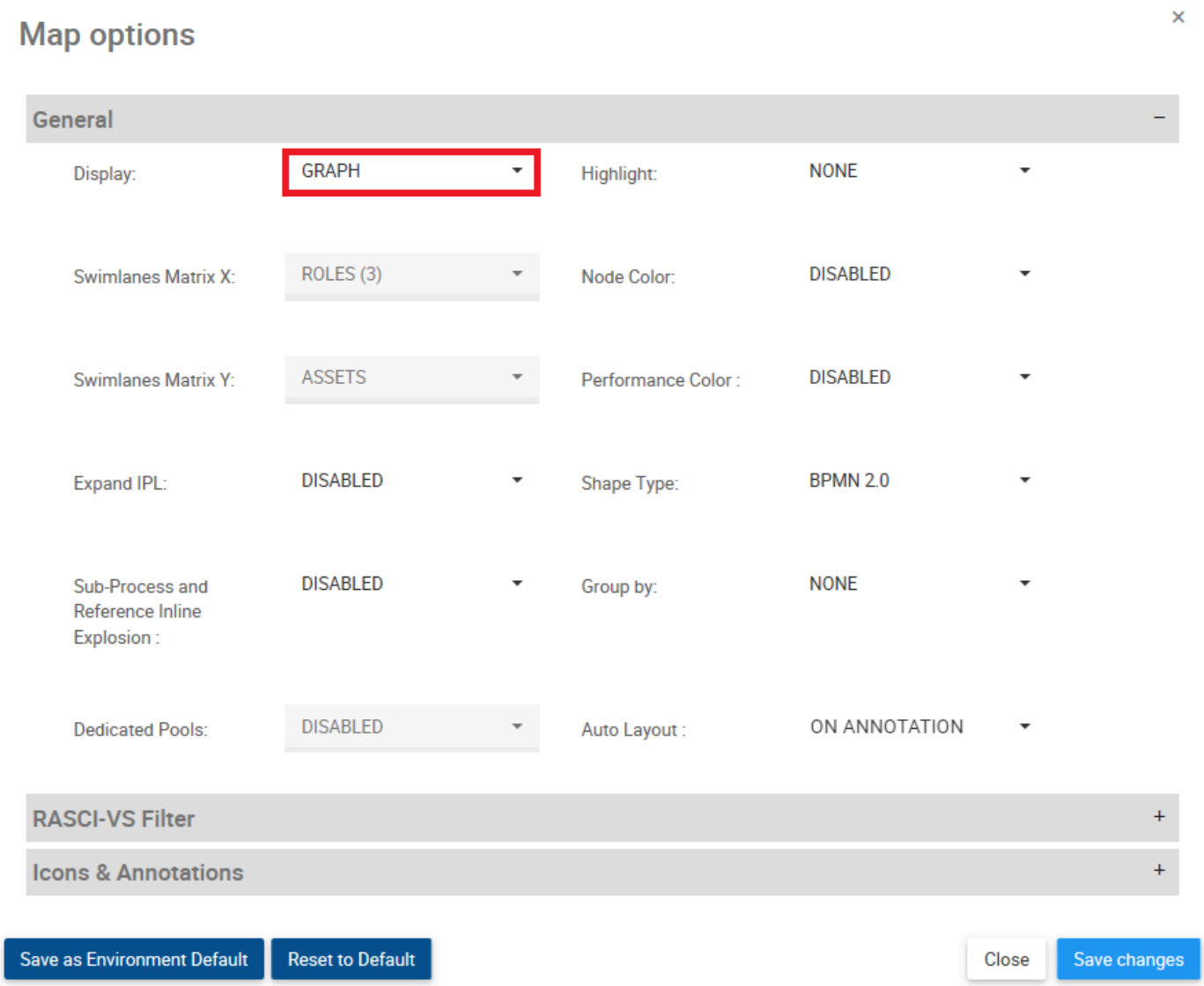
		swimlanes
G	Highlight	Allow user to highlight specific paths (Critical Path, High Risk Path, Value Added, My Tasks, Manual vs. Automated)
H	Node Color	Allow users to enable or disable pre-set node colors
I	Performance Color	Allow users to enable or disable pre-set performance colors
J	Shape Type	Allow users to toggle between process viewing formats (BPMN 2.0, Simple BPMN, VSM, Default, Custom)
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 click, on annotation 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.

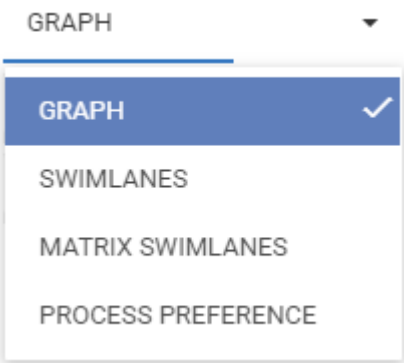
To use the Display option, please see the steps below:

1. Select “Options” icon

2. Navigate cursor to Display bar



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

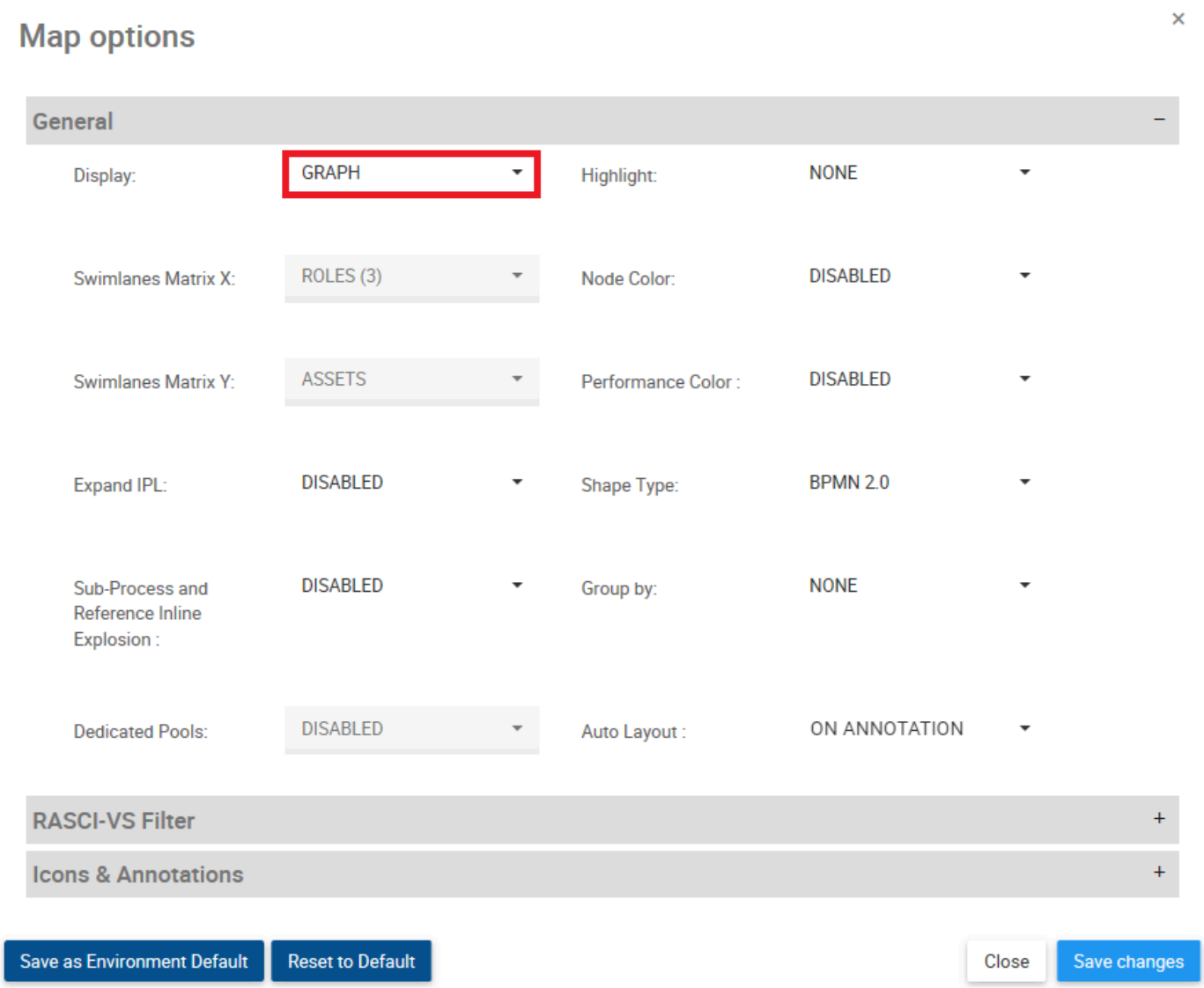
B. Swimlanes Matrix X: This feature allows users to set the X-axis for Matrix Swimlane Graphs.

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

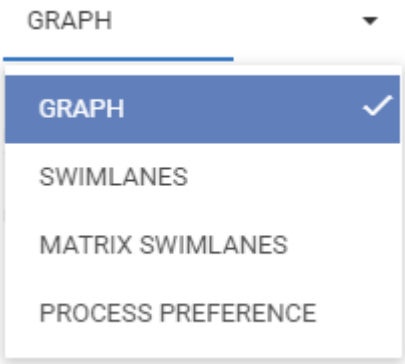
To use the Swimlanes Matrix X option, please see the steps below:

1. Select “Options” icon

2. Navigate cursor to Display bar

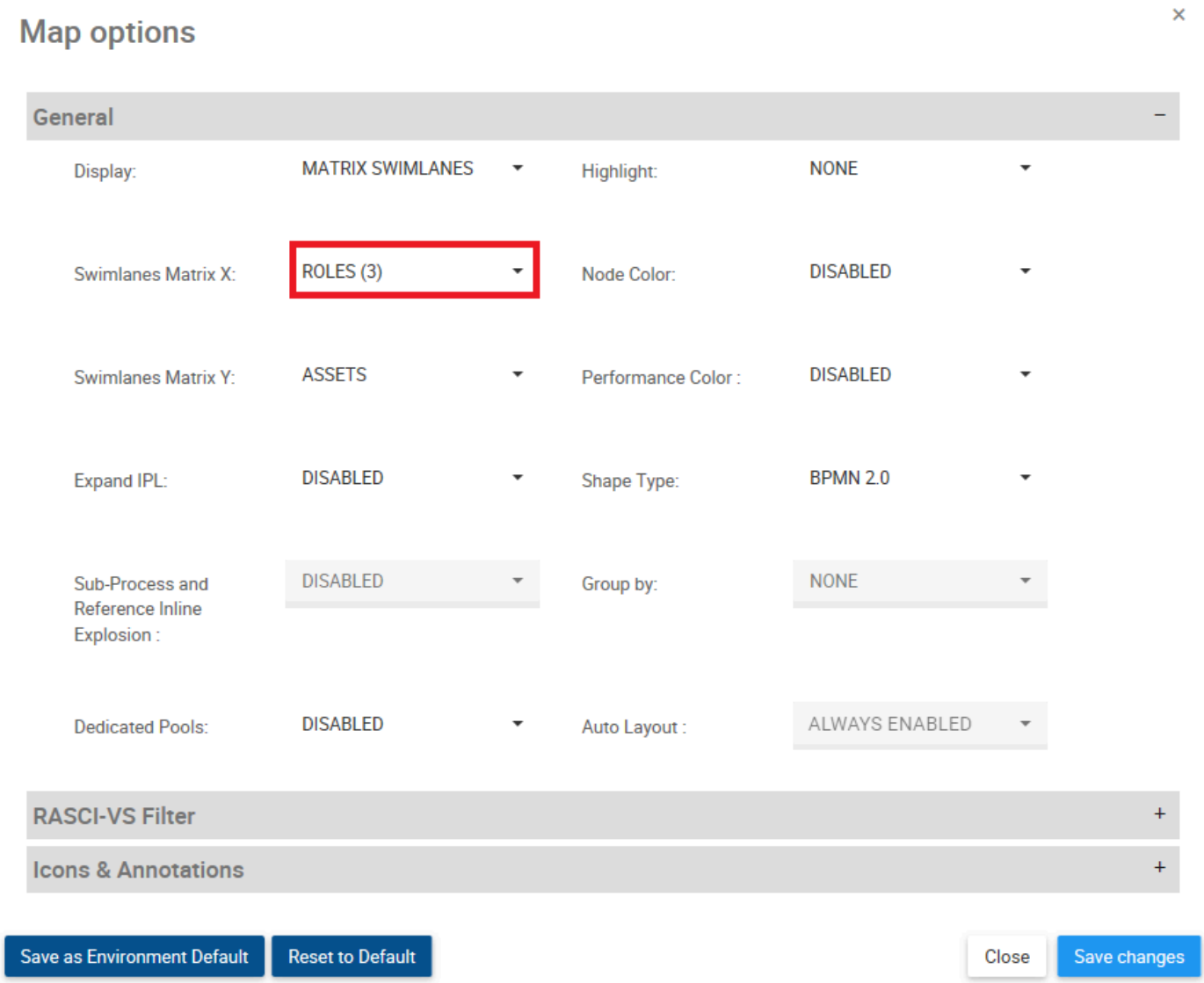


3. The following drop-down menu will be generated

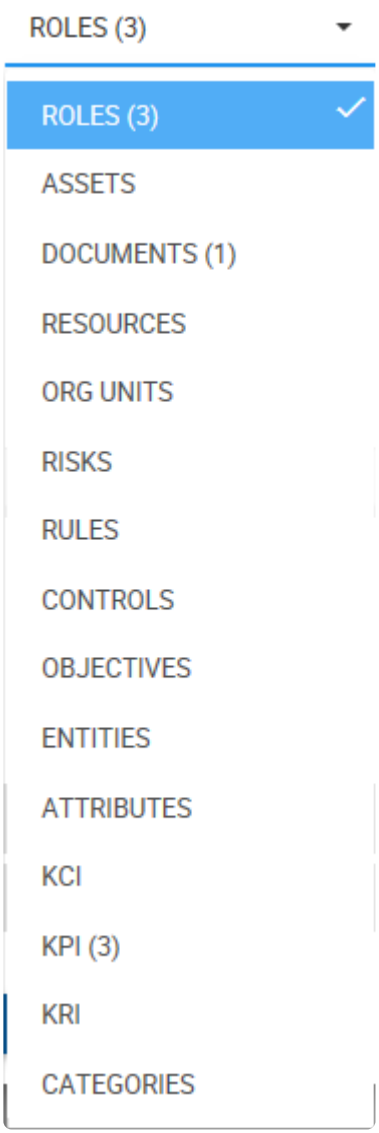


4. Select Matrix Swimlanes

5. Navigate and select Swimlanes Matrix X bar



6. The following drop-down menu will be generated



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

> 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.

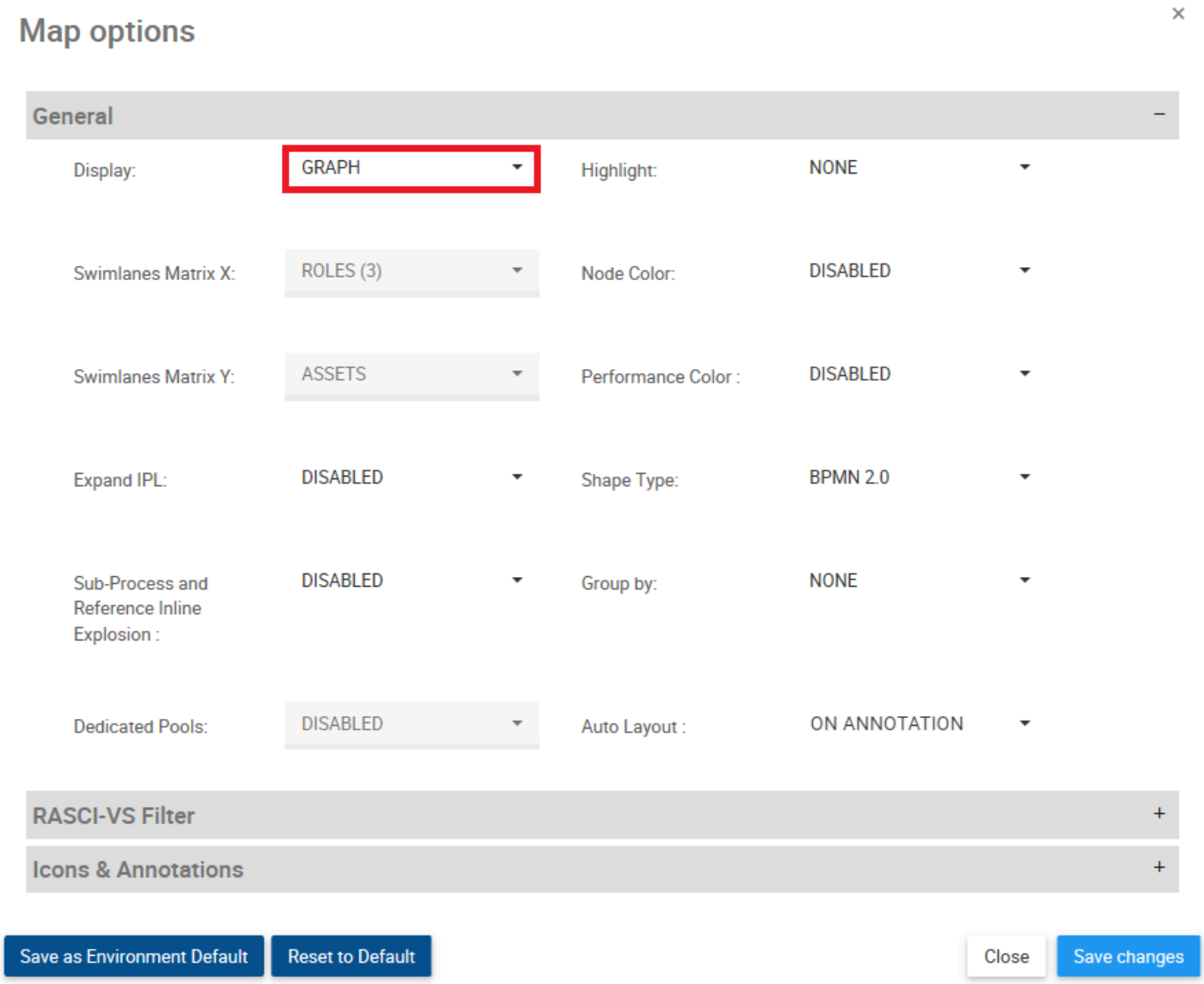
C. Swimlanes Matrix Y: This feature allows users to set the Y-axis for Swimlane and Matrix Swimlane Graphs.

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

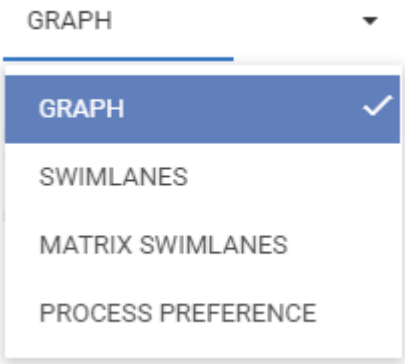
To use the Swimlanes Matrix X option, please see the steps below:

1. Select “Options” icon

2. Navigate cursor to Display bar

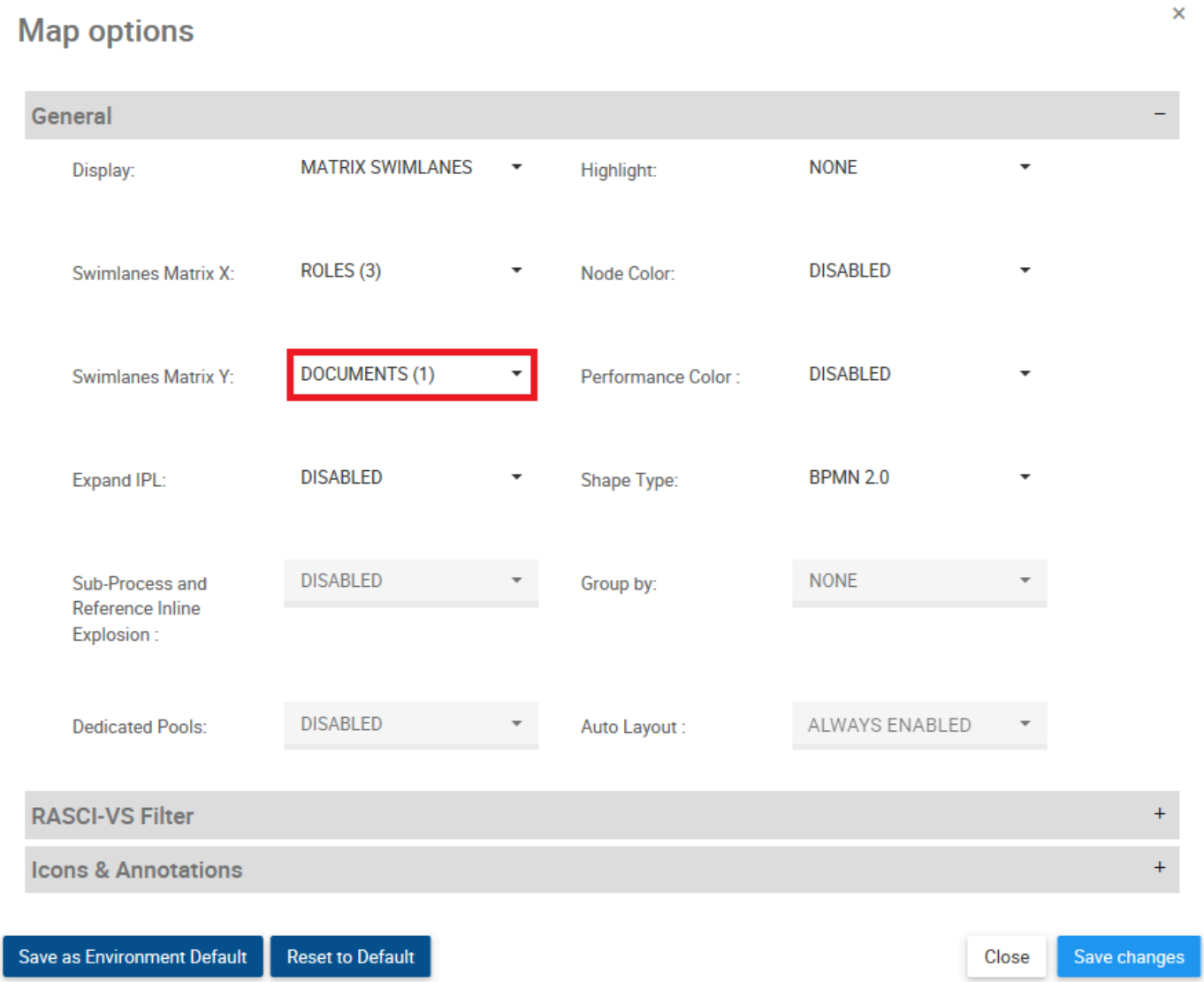


3. The following drop-down menu will be generated

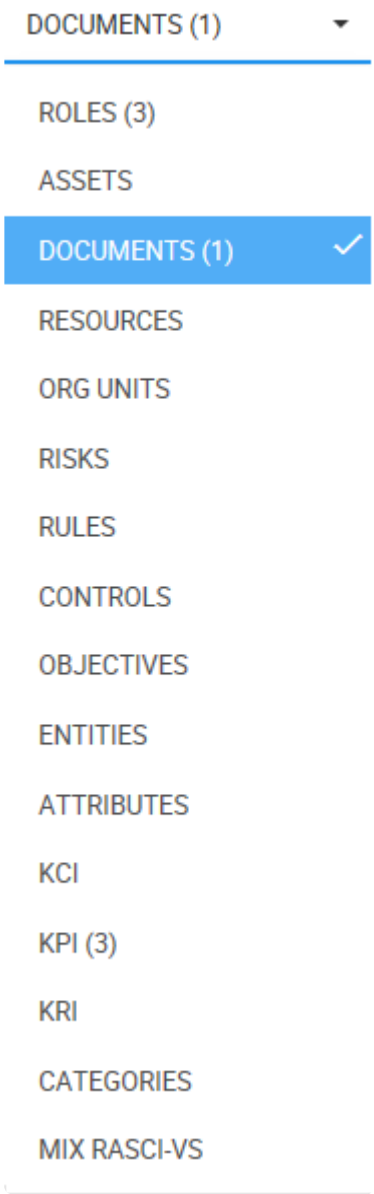


4. Select Swimlanes or Matrix Swimlanes

5. Navigate and select Swimlanes Matrix Y bar



6. The following drop-down menu will be generated



7. Select the desired item for the Y-axis

> 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)

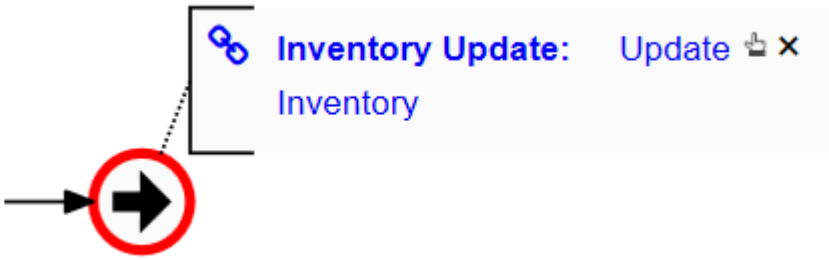
8. Select the “Save Changes” button at the bottom right of the page.

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.

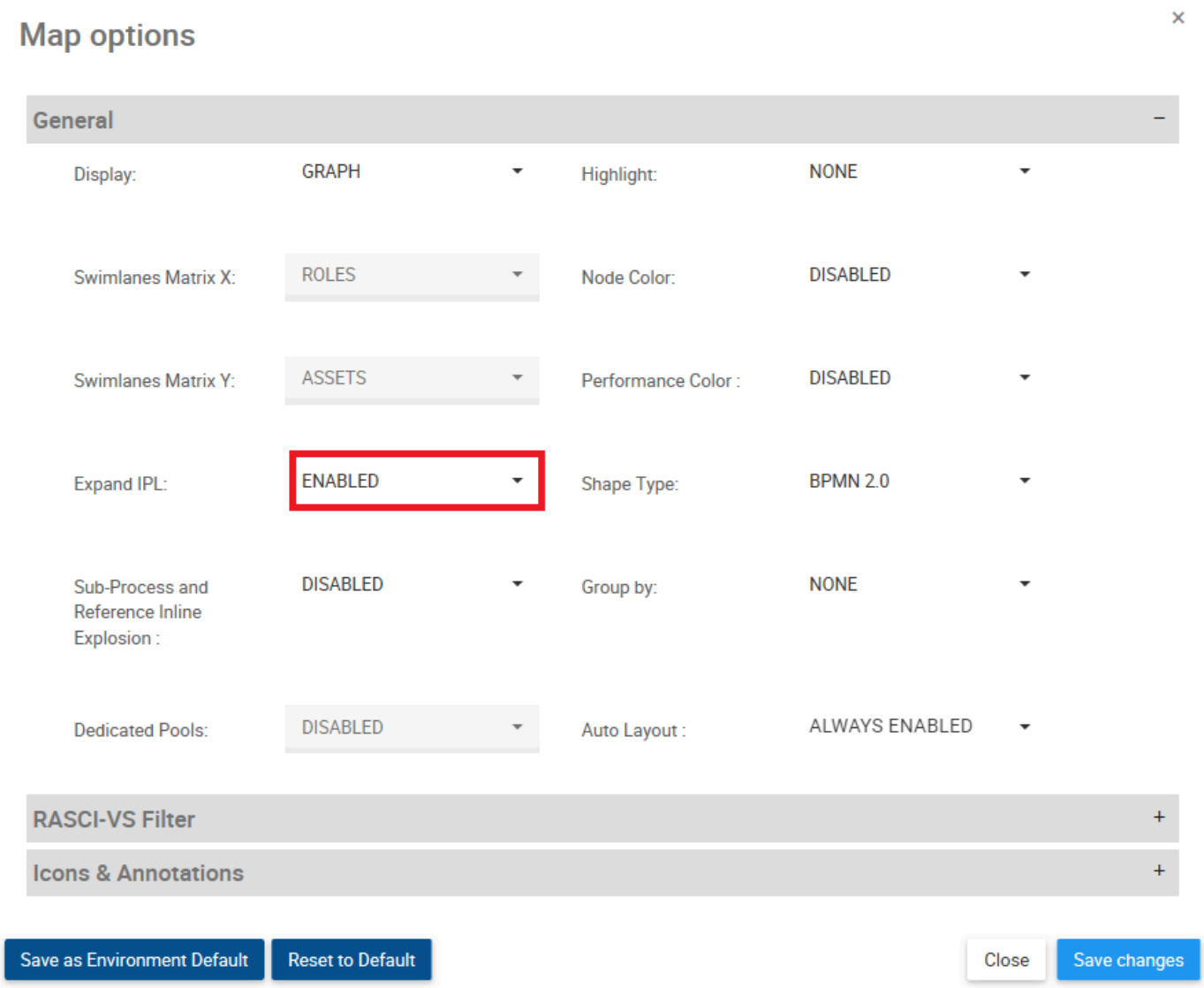
If you have enabled the IPL **annotation** in the graph settings or have clicked on the IPL icon, you will see an annotation as displayed below containing the process name in bold followed by the name of the task that the IPL will lead to. In this example, the linked process is named “Payment” and the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



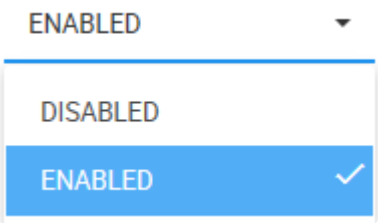
How to Expand IPL

1. Select “Options” icon

2. Navigate cursor to Expand IPL bar



3. The following drop-down menu will be generated

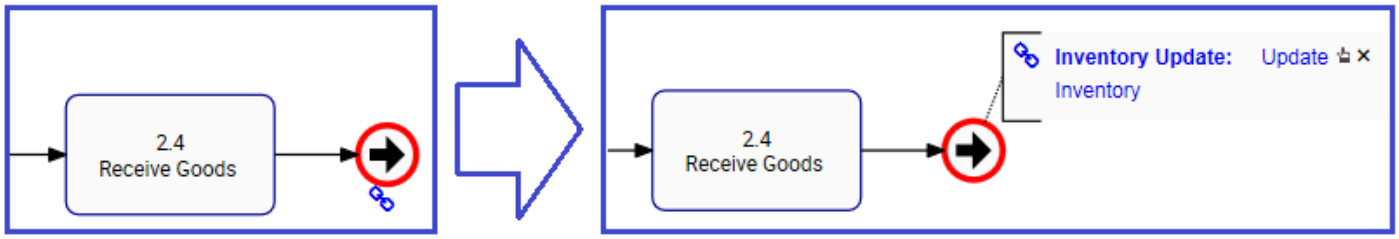


4. Select Enabled

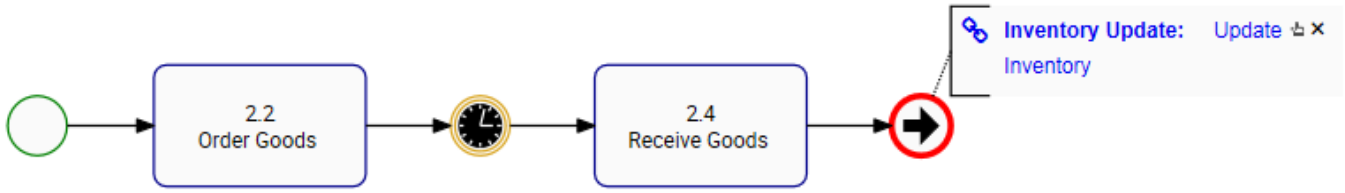
5. Navigate to a process. Make sure you are on a process that has an IPL to another process.

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.

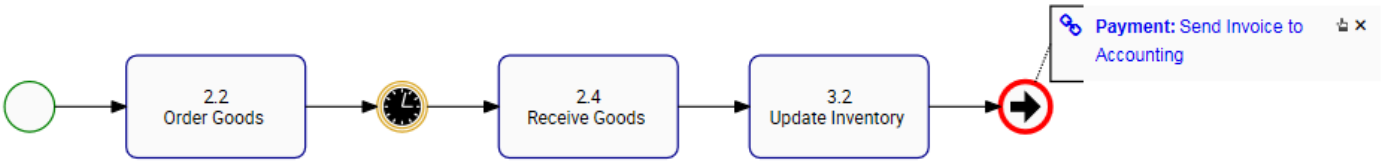


7. Click on the blue text of the IPL annotation.



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.

G. Highlight: The highlight function allows you to highlight the Critical Path, the High Risk Path, or tasks that are Value Added. Addtionally, tasks to which a resource or a role that is linked to your user account can be highlighted and manual vs. automated tasks can be displayed as well.

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 Webapp

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 Webapp

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 Webapp

My Tasks [R]: Flow objects that are assigned to you via a resource or a role will be highlighted in the process map. Note that only flow objects for which you are RESPONSIBLE for will be highlighted.

Manual Vs Automated: Indicates the automation level of an activity. Highlighted in red are tasks which require human input (manual activity), highlighted in yellow are activities which require human input but are assisted by a system (semi-automated activity) and highlighted in green are activities which require no human input and is fully automated by a system (automated). The flow object will be highlighted depending on whether an asset, role, resource or org unit is assigned to it. Refer to the table below for the RASCI-VS assignment rules for the highlighting.

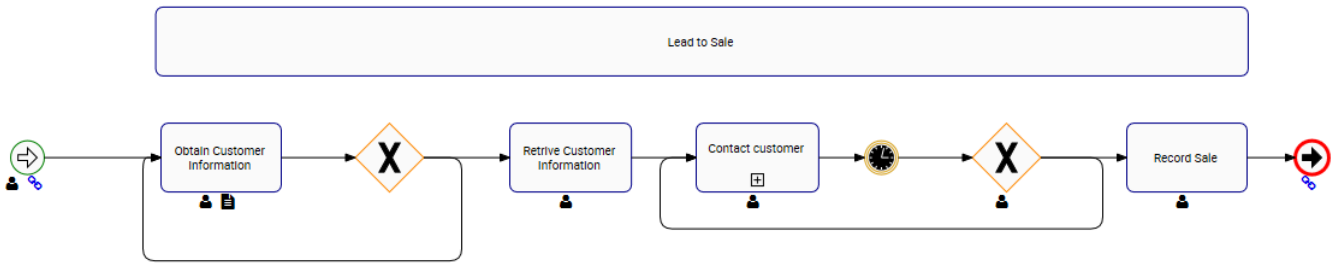
Color	RASCI-VS Assignment
GREEN	Asset [R] or/and [Su]
YELLOW	Asset [R] or/and [Su] + Role/Resource/Org Unit [R]
RED	Role/Resource/Org Unit [R]

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.

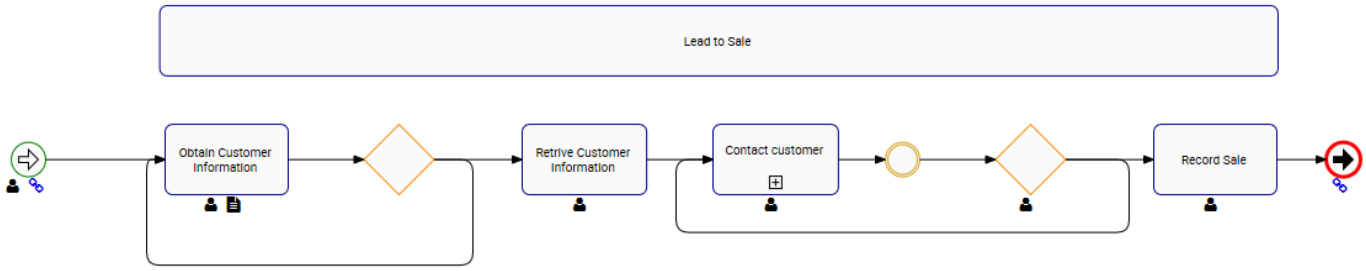
I. Performance Color: If enabled, flow objects will adopt the color (Green, Yellow, or Red) of the associated performance indicator (KPI, KRI, or KCI). If enabled, flow objects will adopt the color (Green, Yellow, or Red) of the associated performance indicator (KPI, KRI, or KCI). See the Performances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

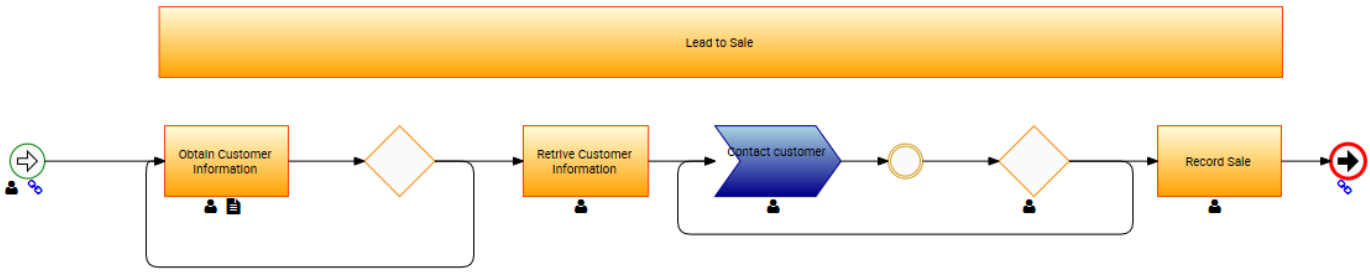
a. BPMN 2.0 (Business Process Modeling Notation)



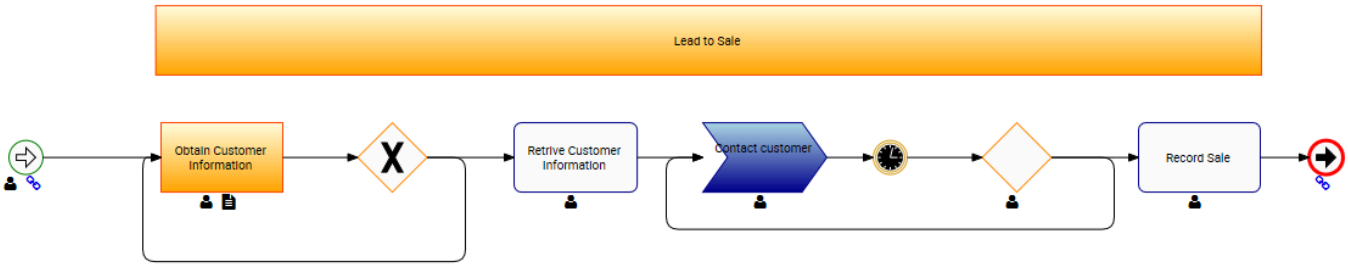
b. Simple BPMN (Business Process Modeling Notation)



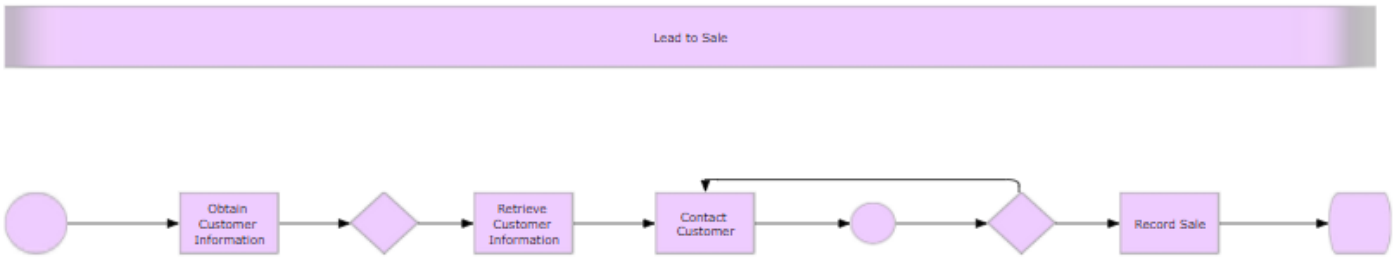
c. VSM (Value Stream Mapping)



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



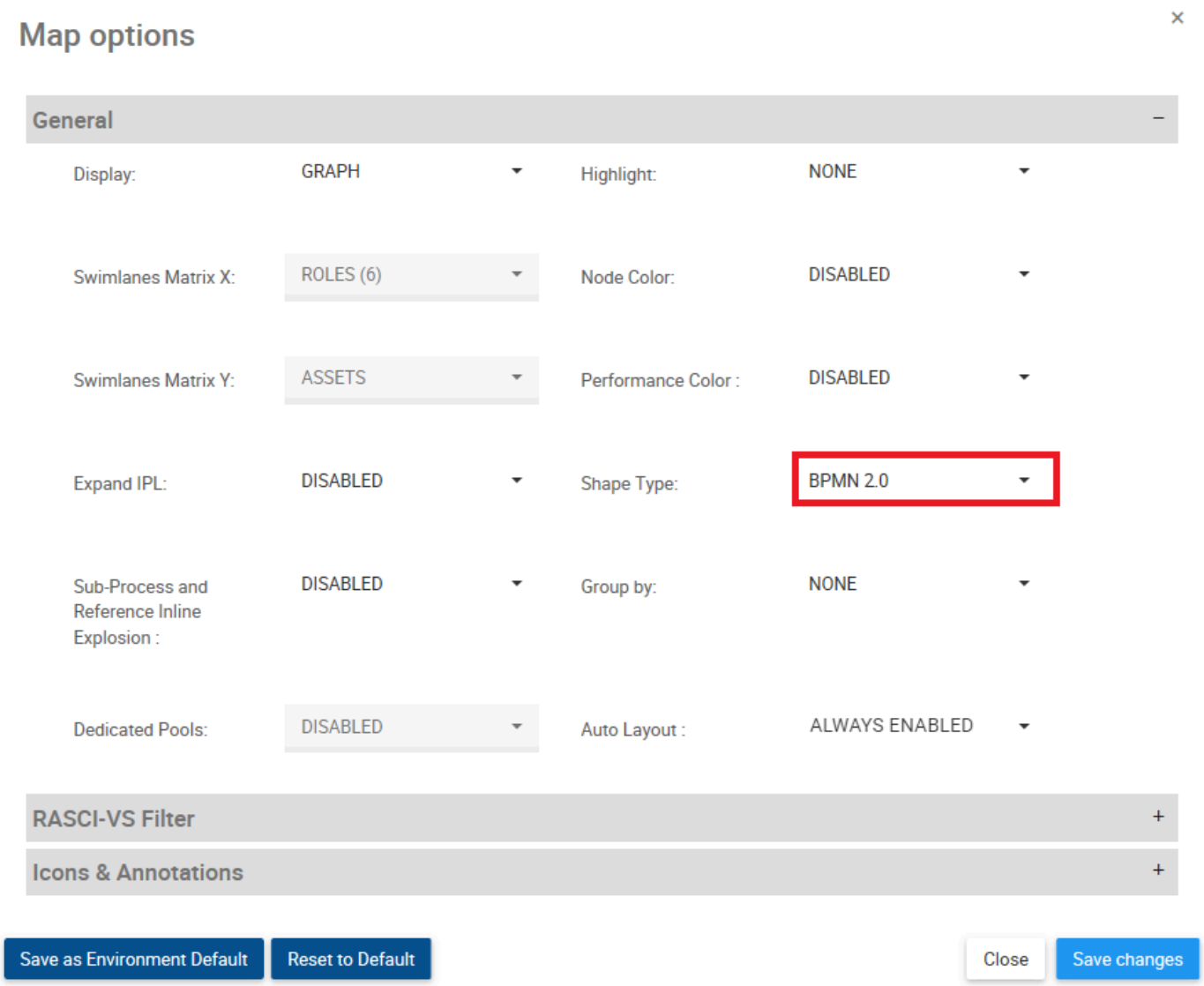
e. Custom: This view allows users to include custom flowchart images, provided by the System Admin, as process shape.



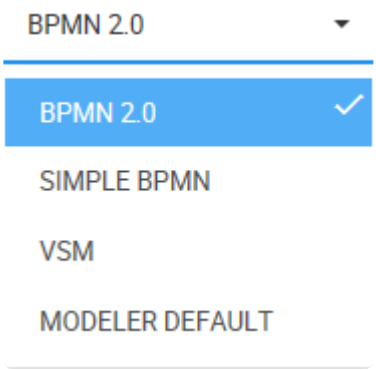
To toggle between Shape Types, please see the steps below:

1. Select “Options” icon

2. Navigate cursor and select Shape Type option



3. The following drop-down menu will be generated



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.

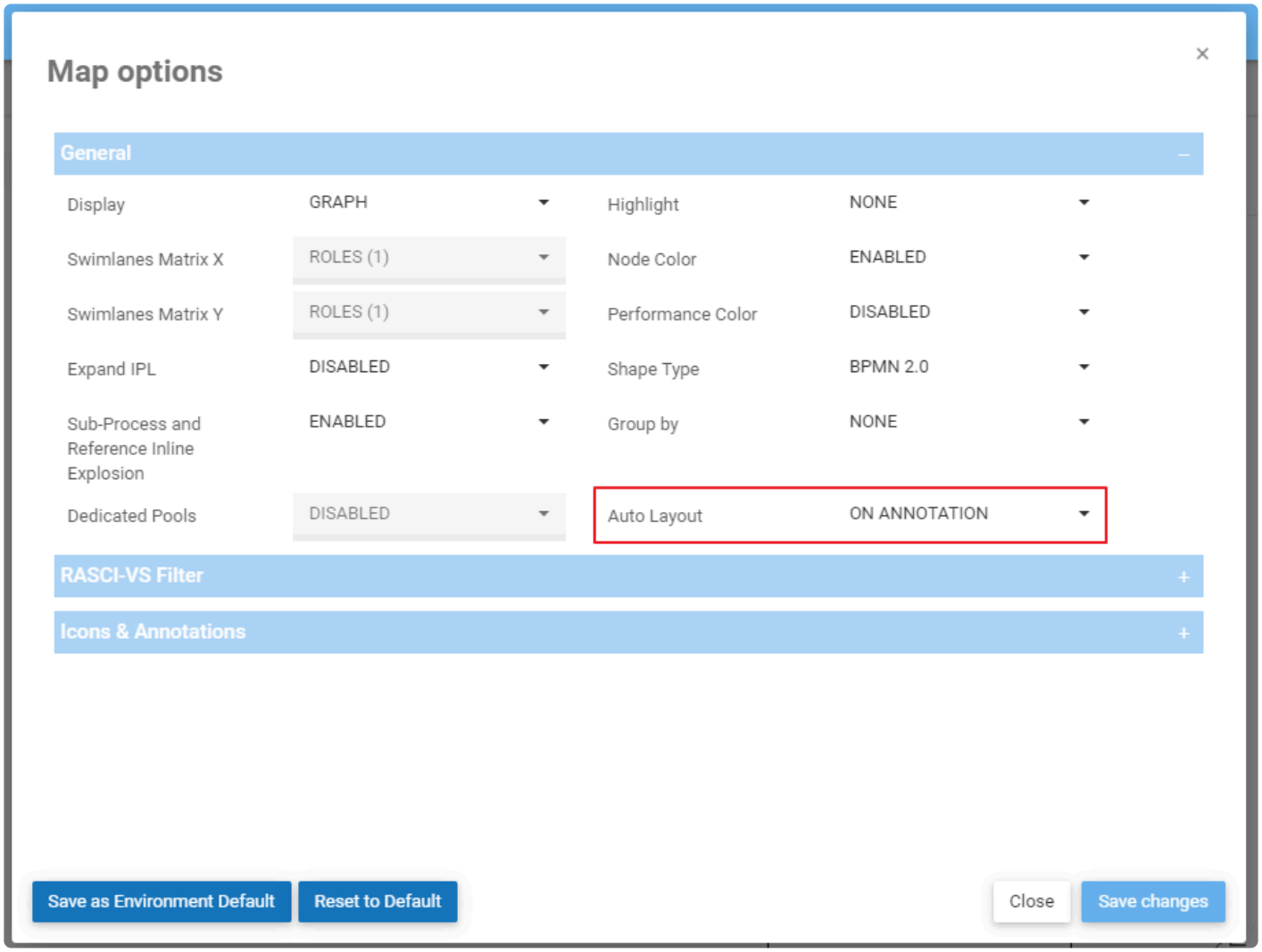
L. Auto Layout: Auto Layout allows users to generate a user friendly layout at the click of a button. Users can enable auto-layout on click, on annotations or have the setting constantly applied on processes.

Setting	Result
Always Disabled	Auto-layout is never run. The user has to manually run auto-layout by clicking the button.
On Annotation	Auto-layout is only automatically run when the user expands icons to annotations or when annotations are closed
Always Enabled	Auto-layout is always run automatically.

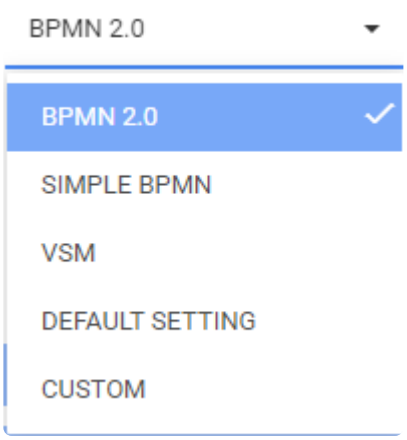
To use the Auto Layout option, please see the steps below:

1. Select “Options” icon

2. Navigate cursor to Auto Layout



3. The following drop-down menu will be generated



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.

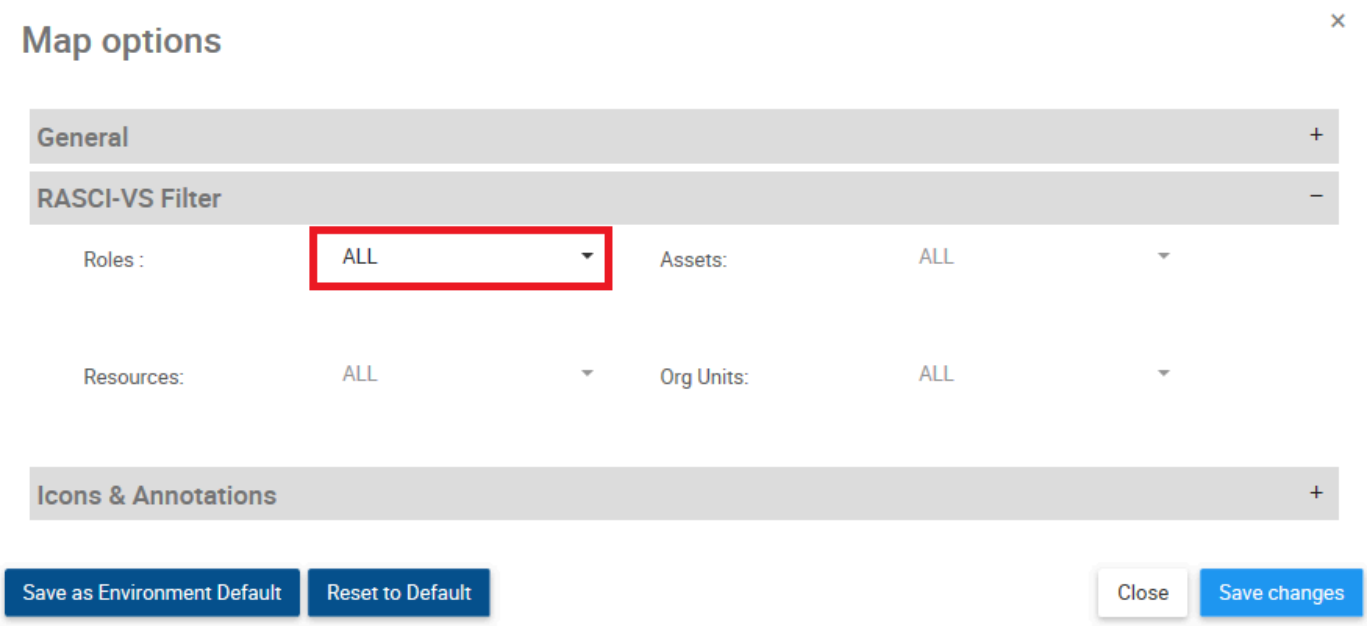
The RASCI-VS filter can be applied to the following items:

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

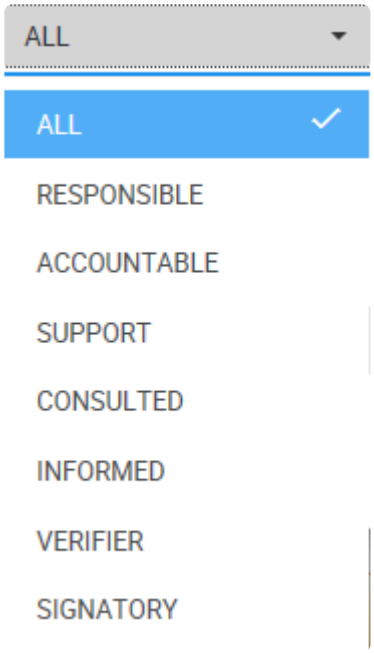
To use the RASCI-VS Filters, please see the steps below:

1. Select “Options” icon

2. Navigate cursor to Roles



3. The following drop-down menu will be generated



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	
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

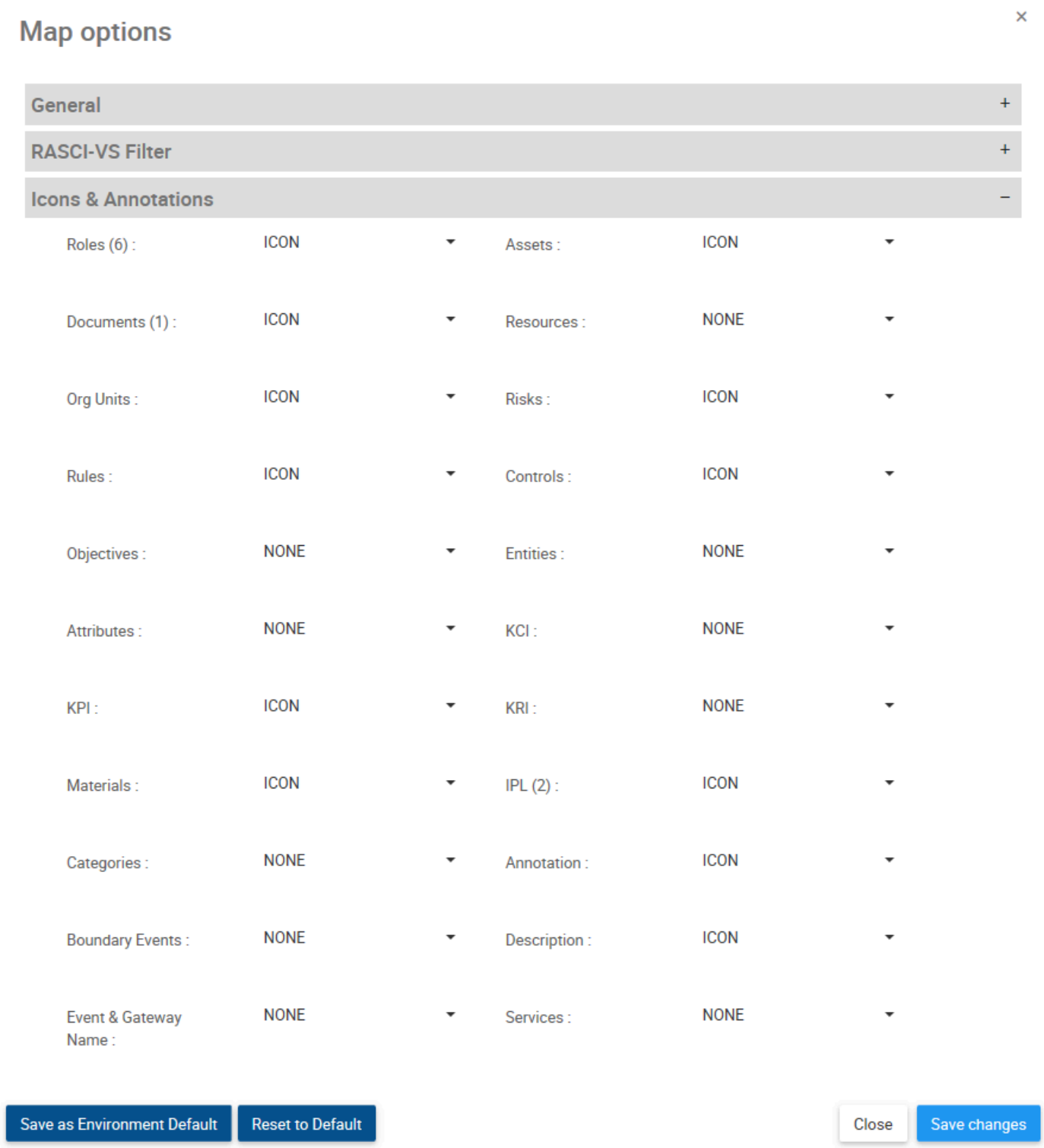
Icon	Item
	Roles
	Assets
	Documents
	Resources
	Org Units
	Risks
	Rules
	Controls
	Objectives
	Entities
	Attributes
	KCI
	KPI
	KRI
	Materials
	IPL
	Categories
	Annotation
	Event & Gateway Name

How to Enable Icons & Annotations

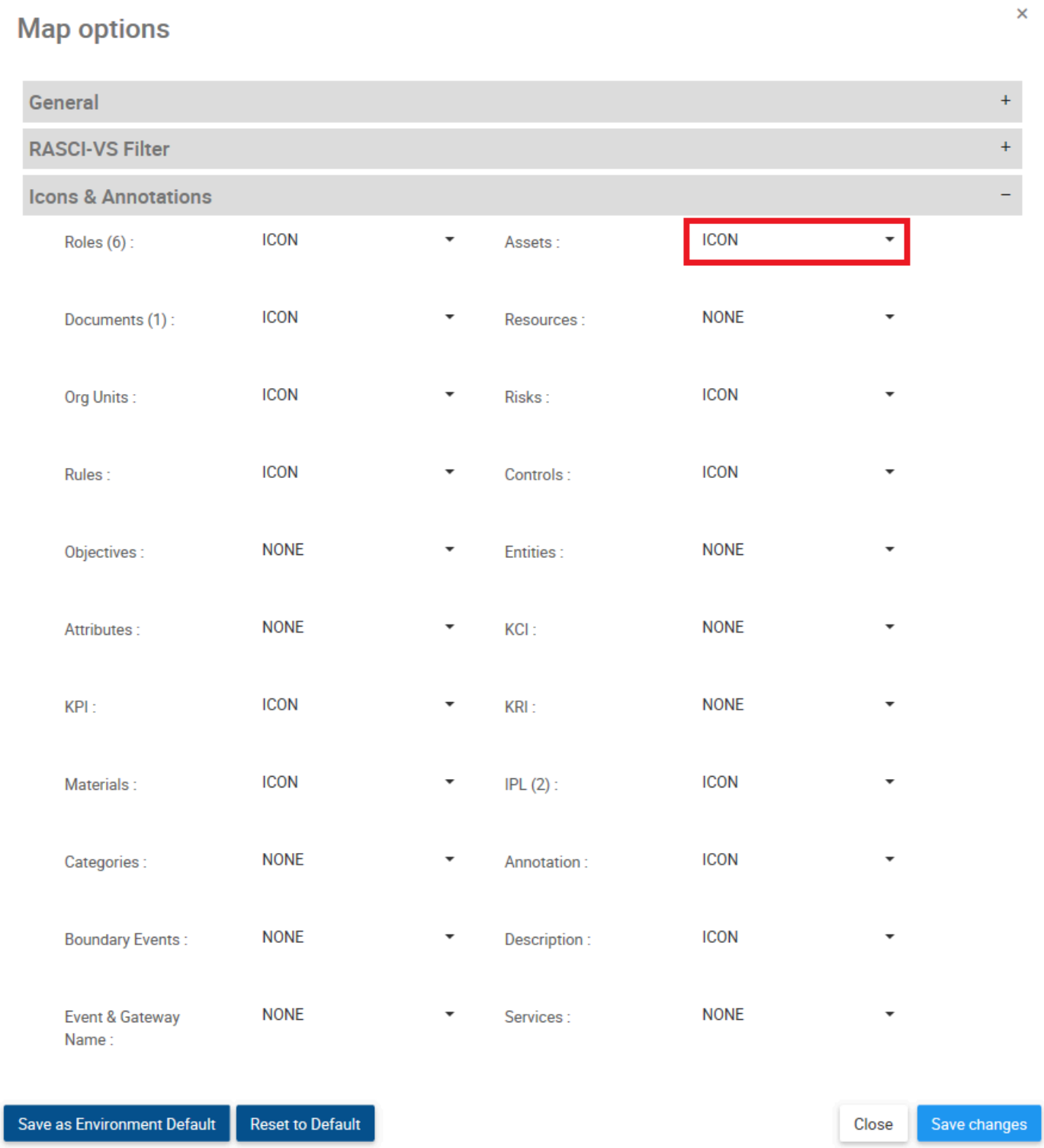
Users can enable Icons and Annotations within “Options” section. To enable Icons & Annotations, please see the steps below:

1. Select “Options” icon

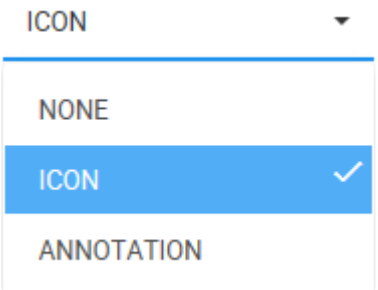
2. Navigate cursor to Icons & Annotations section



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



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

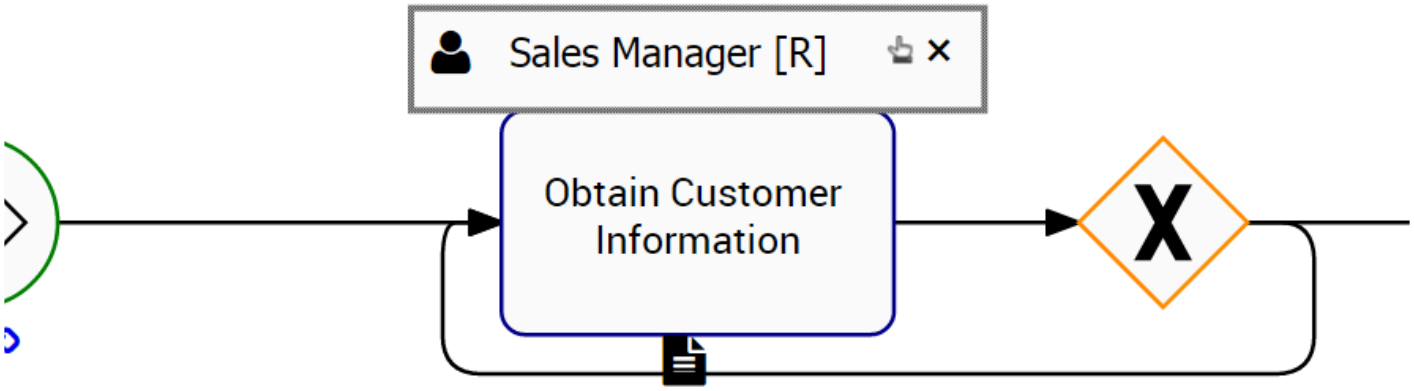
The EPC allows users to shift the position of Annotations within a Graph to optimize viewing capabilities. Users can reorganize annotations based on a **pre-set placement** options, or personalize their map through **personalized map customization**.

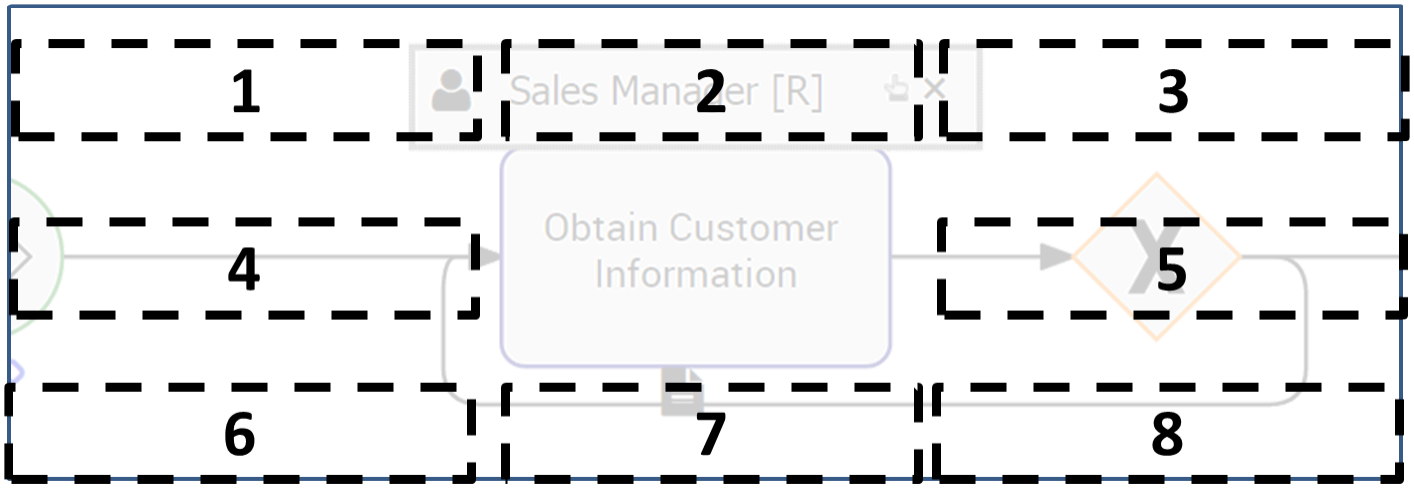
To use the **Pre-Set Placement** options, Please see the steps below:

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





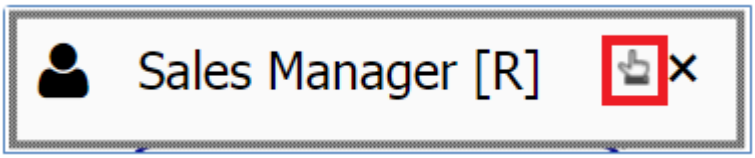
4. Click and hold the Annotation. Drag it to the desired location

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

1. Enable Annotations for a particular item

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

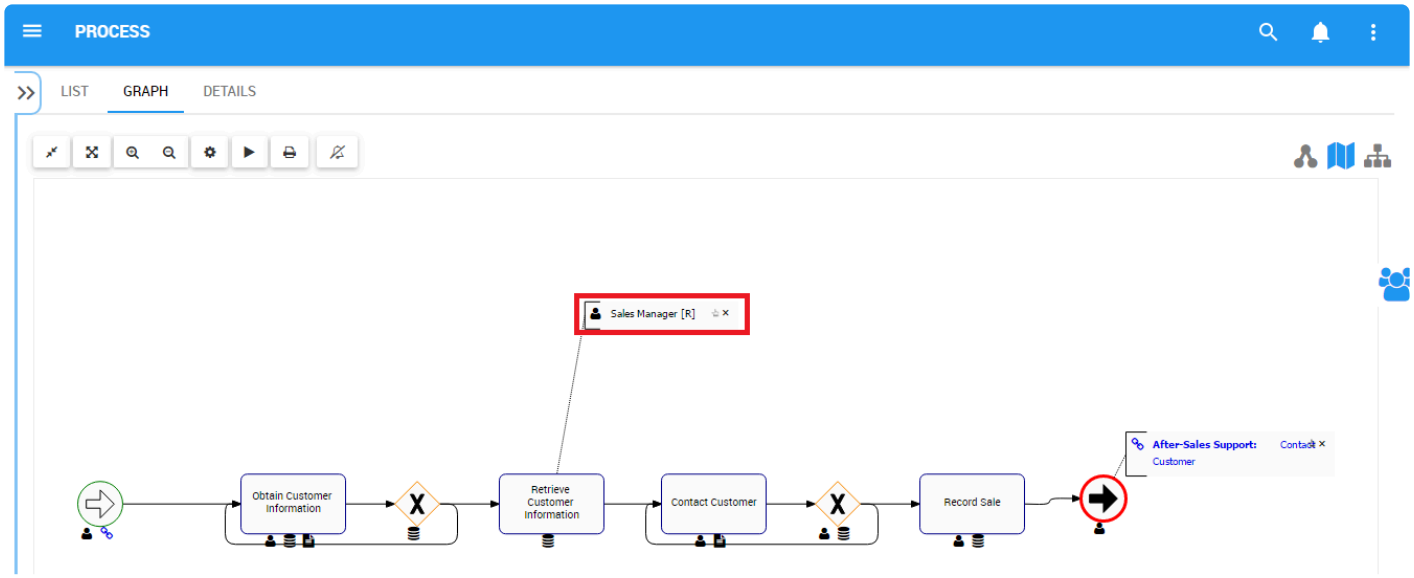
3. Select the icon **once** located on the right hand side of the annotation



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.

Note: User have different 2 different annotation and event name styles to choose from

Using Map Setting or View Setting

When you click on edit and If your user setting are different than the map's edit settings. Then you will have options to either change your view setting to the map edit setting or keep the current view setting.

Anything different than the setting below will trigger the popup to change your default user setting to the map edit setting.

Preference Setting
Autolayout: ON Annotation
Shape Type: BPMN 2.0
Dedicated Pool: Disabled
Expand IPL: Disabled
Sub-process and Reference Inline Explosion : Disabled
Group by: None
Performance Color: Disabled

In addition, if the swimlane for map is different than your user setting than these setting will also be changed:

Swimlane Preference Setting
Assets : Responsible
Roles: Responsible
Resources: Responsible
Org Units: Responsible

4.4.3.2.5.7 Highlight

The highlight function allows you to highlight the Critical Path, the High Risk Path, or tasks that are Value Added. Addtionally, tasks to which a resource or a role that is linked to your user account can be highlighted as well.

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 Webapp

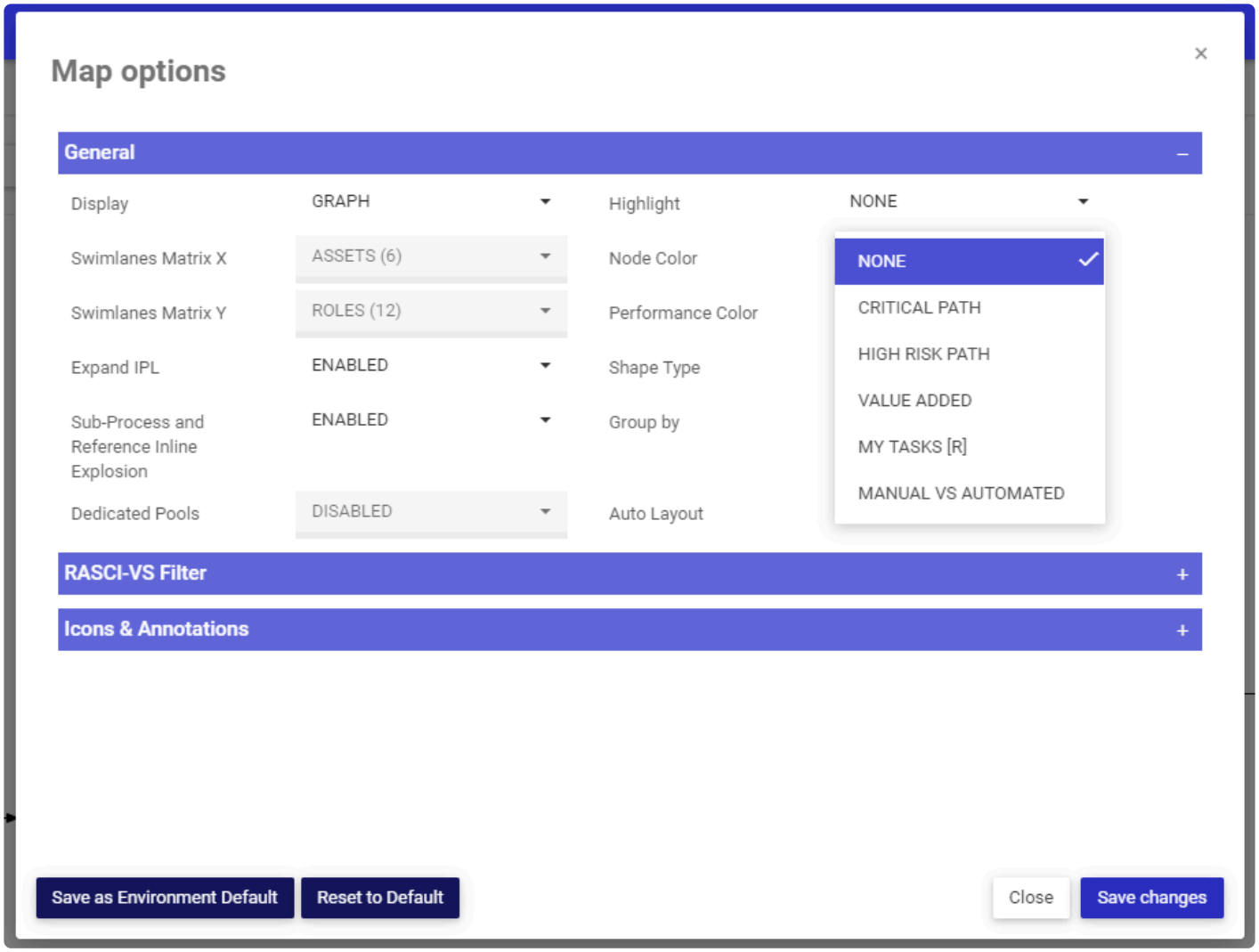
High Risk Path: The sequence of flow objects that determine the path of highest risk throughout the process. Flow objects on the High Risk Path are manually determined and selected in the Webapp

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 Webapp

My Tasks [R]: Flow objects that are assigned to you via a resource or a role will be highlighted in the process map. Note that only flow objects for which you are RESPONSIBLE for will be highlighted.

Manual Vs Automated: Indicates the automation level of an activity. Highlighted in red are tasks which require human input (manual activity), highlighted in yellow are activities which require human input but are assisted by a system (semi-automated activity) and highlighted in green are activities which require no human input and is fully automated by a system (automated). The flow object will be highlighted depending on whether an asset, role, resource or org unit is assigned to it. Refer to the table below for the RASCI-VS assignment rules for the highlighting.

Color	RASCI-VS Assignment
GREEN	Asset [R] or/and [Su]
YELLOW	Asset [R] or/and [Su] + Role/Resource/Org Unit [R]
RED	Role/Resource/Org Unit [R]


Map options
General
Display
GRAPH
Swimlanes Matrix X
ASSETS (6)
Swimlanes Matrix Y
ROLES (12)
Expand IPL
ENABLED
Sub-Process and Reference Inline Explosion
ENABLED
Dedicated Pools
DISABLED
Highlight
NONE
Node Color
Performance Color
Shape Type
Group by
Auto Layout
NONE
CRITICAL PATH
HIGH RISK PATH
VALUE ADDED
MY TASKS [R]
MANUAL VS AUTOMATED
RASCI-VS Filter
Icons & Annotations
Save as Environment Default
Reset to Default
Close
Save changes

4.4.3.2.5.7.1 Critical Path

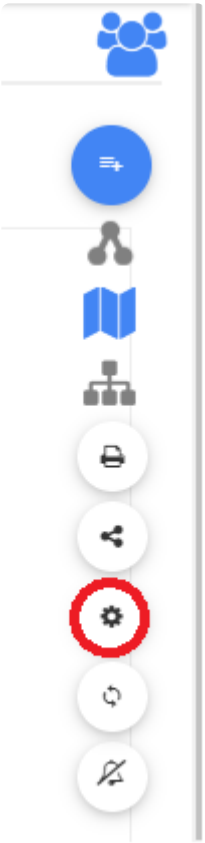
The highlight function allows you to highlight the Critical Path, the High Risk Path, or tasks that are Value Added. Addtionally, tasks to which a resource or a role that is linked to your user account can be highlighted as well.

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 Webapp

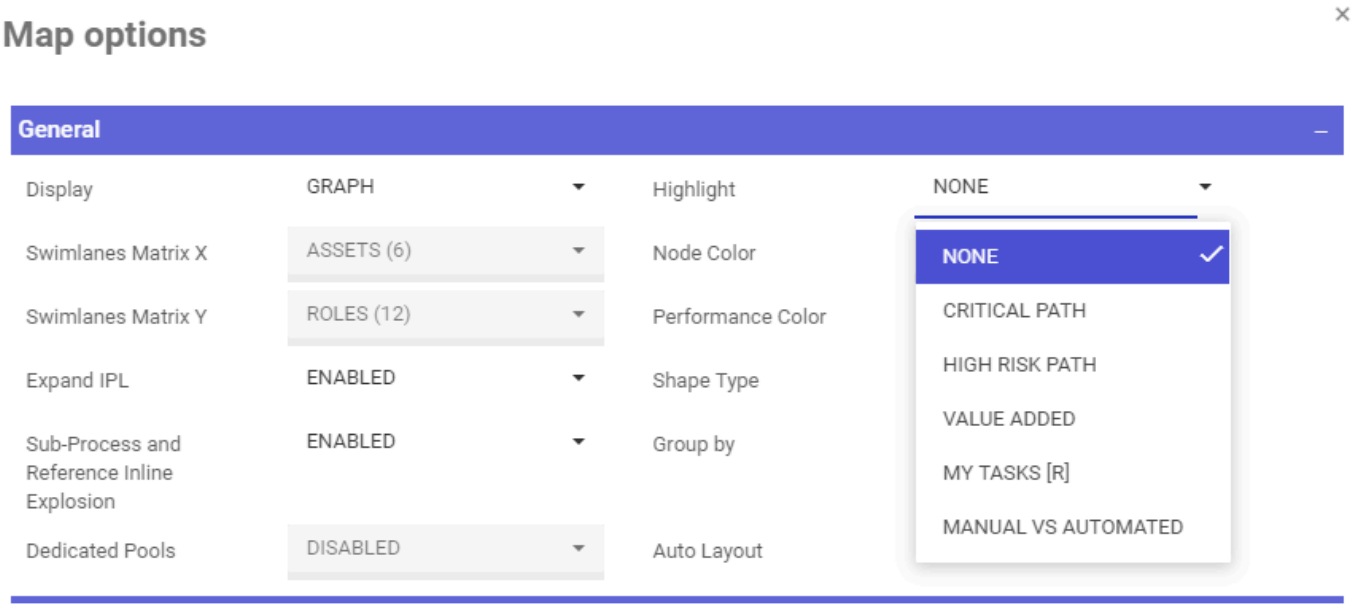
To enable the critical path:

1) Navigate to the process you wish to view

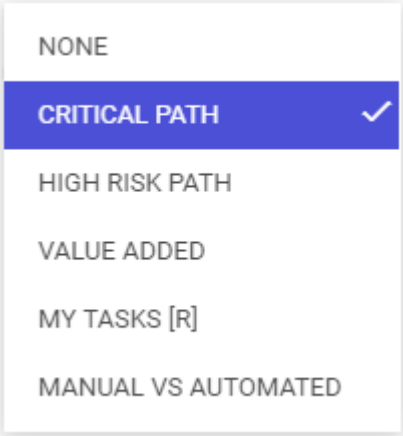
2) Select the ‘Settings’ Icon



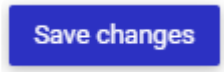
3) Click on the ‘Highlight’ dropdown



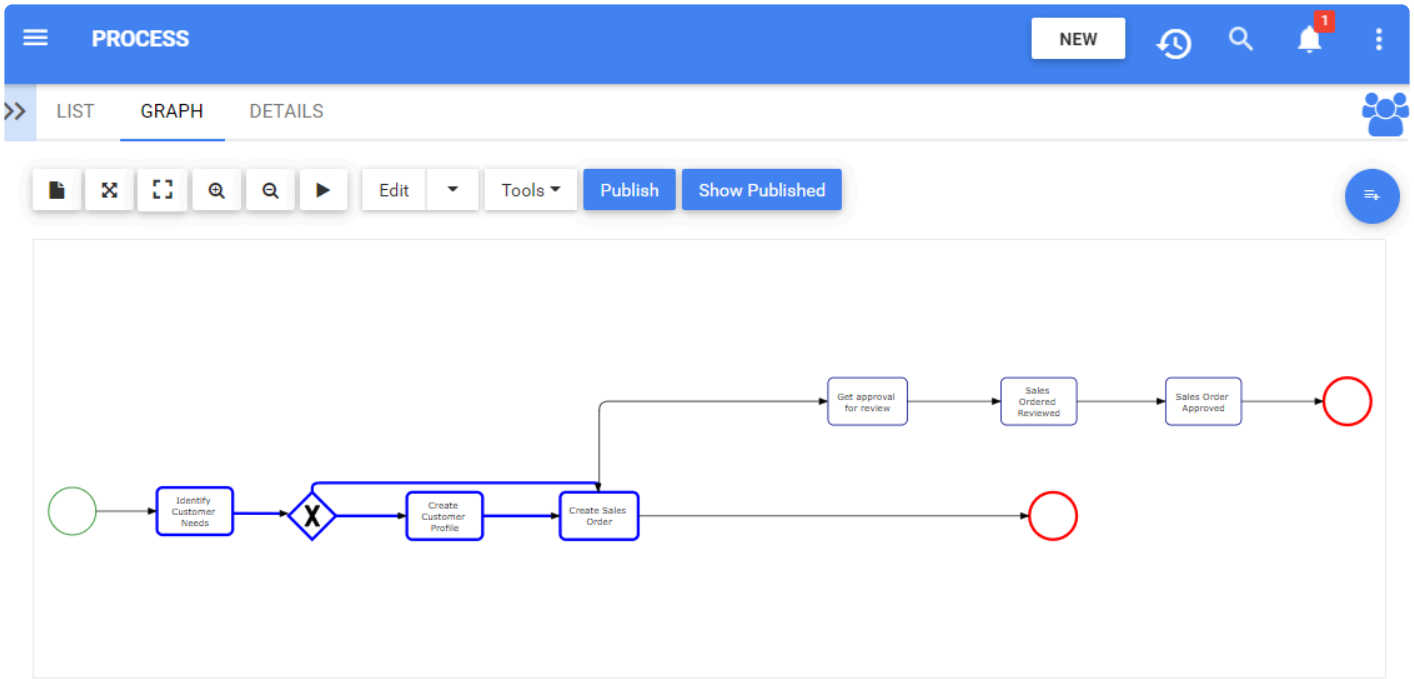
4) Select ‘Critical Path’



5) Click on ‘Save Changes’



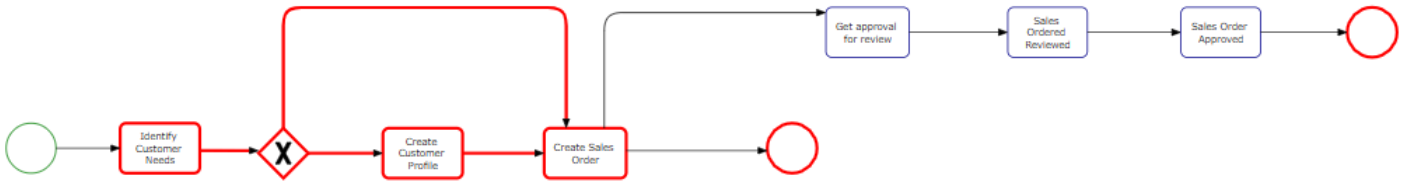
6) Review the Results


PROCESS
NEW
LIST
GRAPH
DETAILS
Edit
Tools
Publish
Show Published
Identify Customer Needs
Create Customer Profile
Create Sales Order
Get approval for review
Sales Ordered Reviewed
Sales Order Approved

4.4.3.2.5.7.2 High Risk Path

The highlight function allows you to highlight the Critical Path, the High Risk Path, or tasks that are Value Added. Addtionally, tasks to which a resource or a role that is linked to your user account can be highlighted and manual vs. automated tasks can be displayed as well.

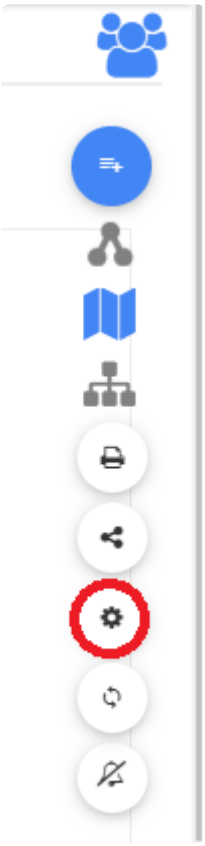
High Risk Path: The sequence of flow objects that determine the path of highest risk throughout the process. Flow objects on the High Risk Path are manually determined and selected in the Webapp



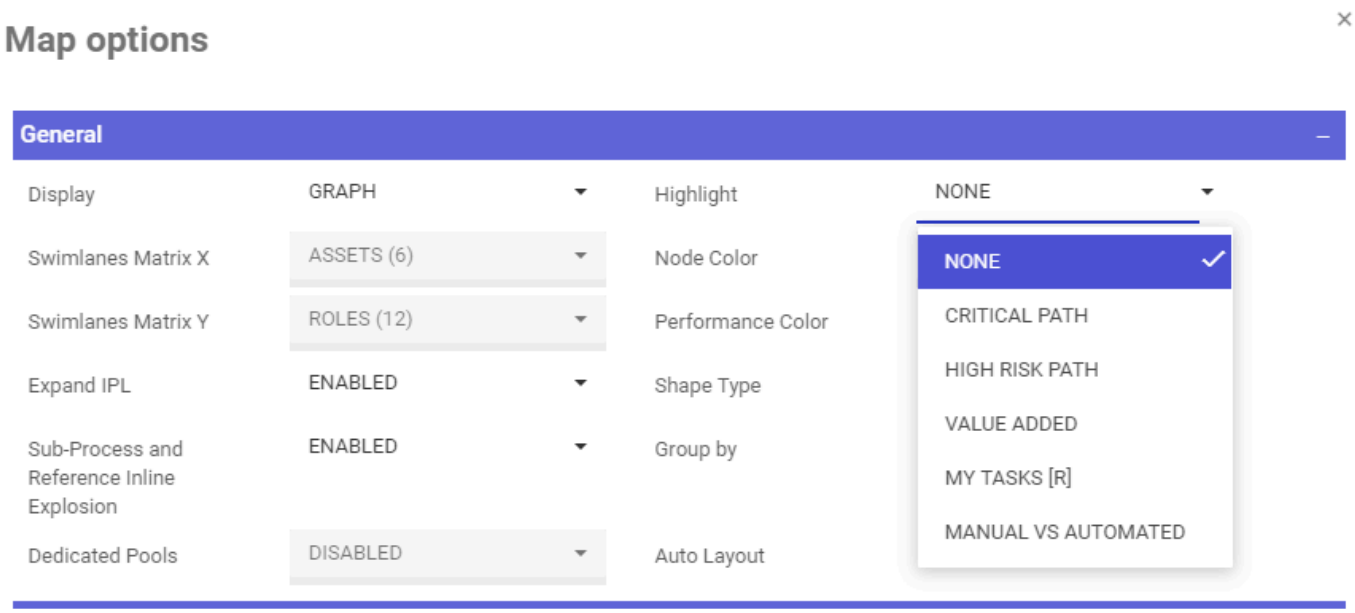
To enable the High Risk Path:

1) Navigate to the process you wish to view

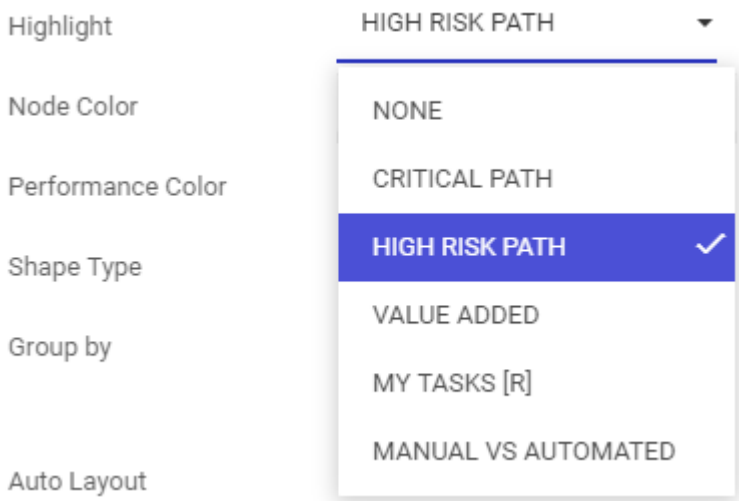
2) Select the ‘Settings’ Icon



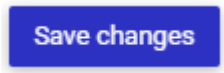
3) Click on the ‘Highlight’ dropdown



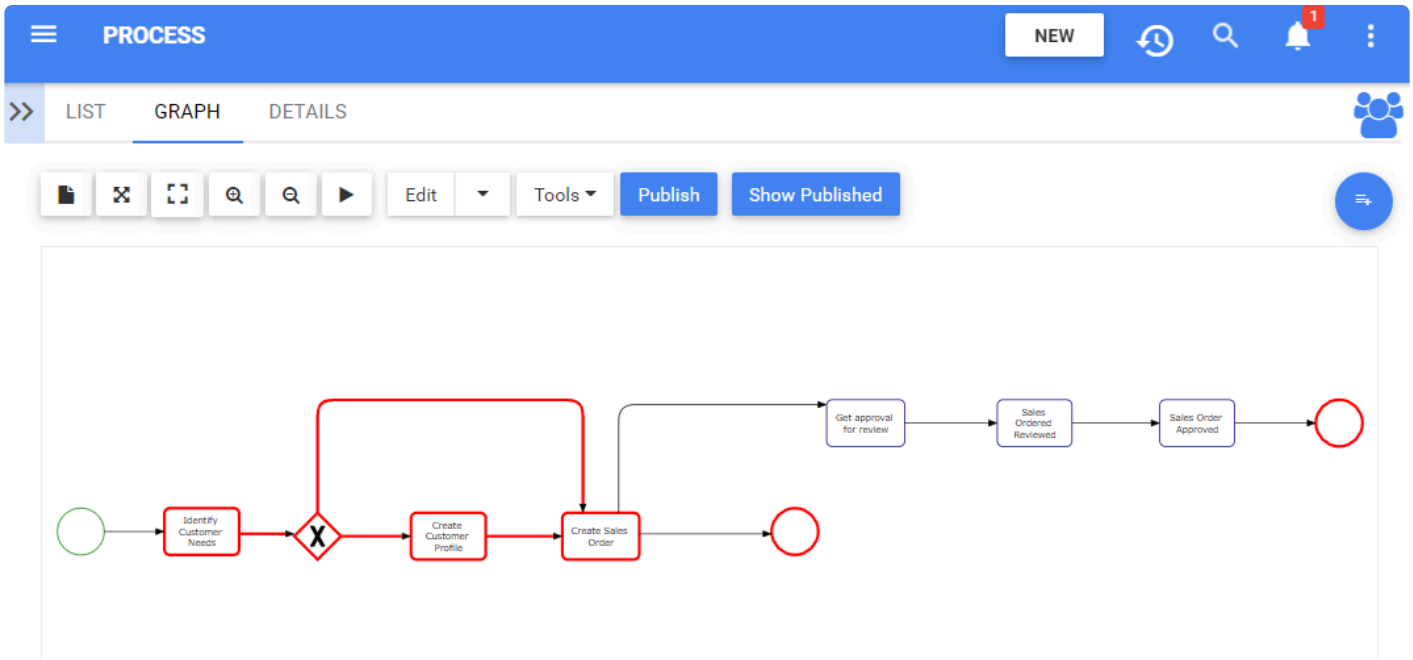
4) Select ‘High-Risk Path’



5) Click on 'Save Changes'



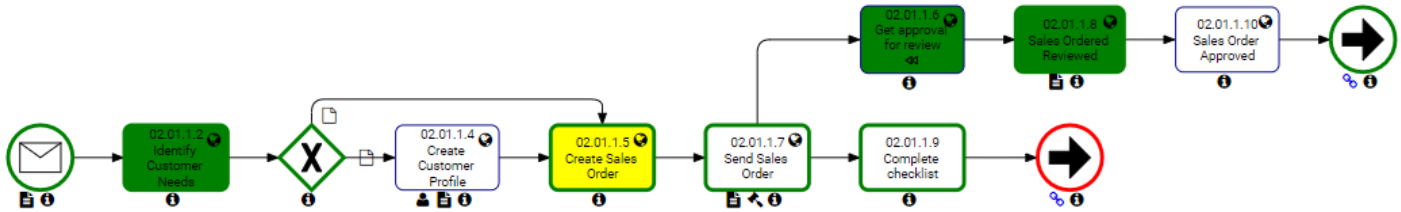
6) Review the Results



4.4.3.2.5.7.3 Value Added

The highlight function allows you to highlight the Critical Path, the High Risk Path, or tasks that are Value Added. Addtionally, tasks to which a resource or a role that is linked to your user account can be highlighted and manual vs. automated tasks can be displayed as well.

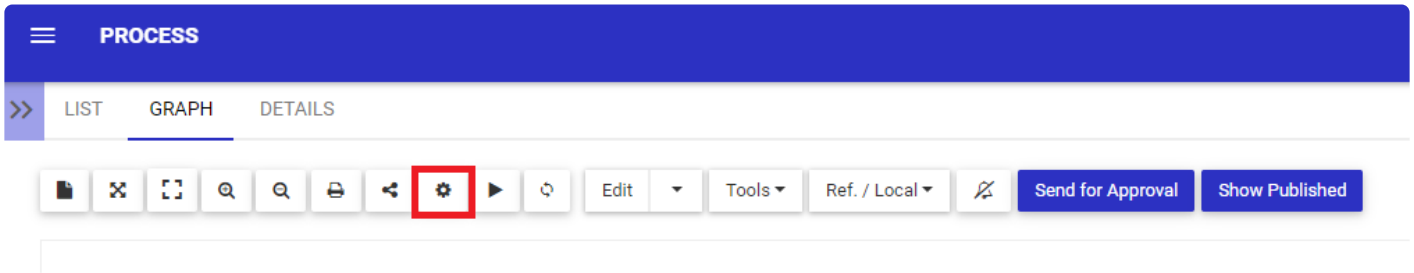
Value Added: Flow objects that add value to the output of the process or organization. Flow objects that are Value Added are manually determined and selected in the Webapp



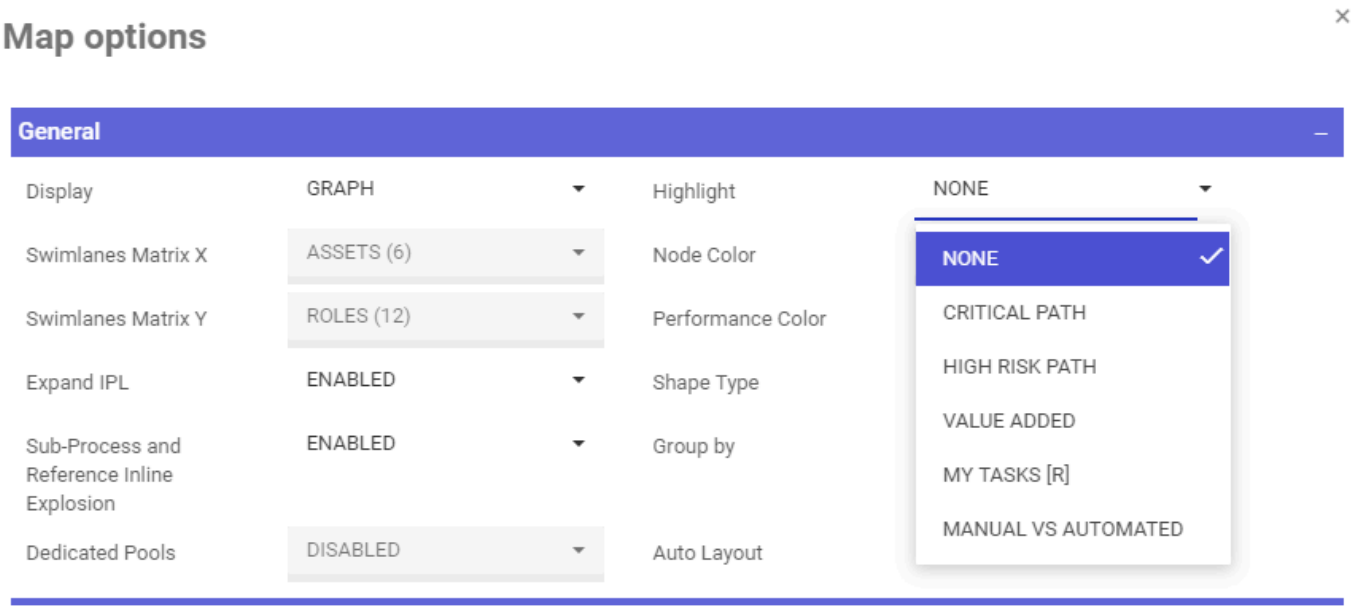
To enable the Value Added Tasks:

1) Navigate to the process you wish to view

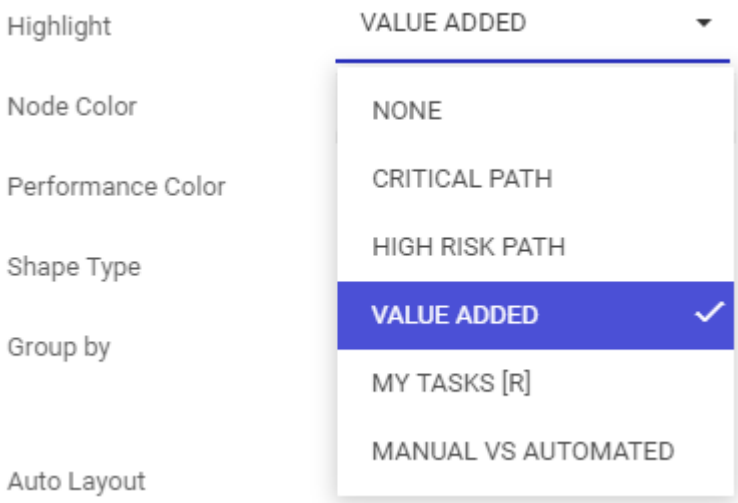
2) Select the ‘Settings’ Icon



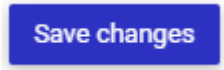
3) Click on the ‘Highlight’ dropdown



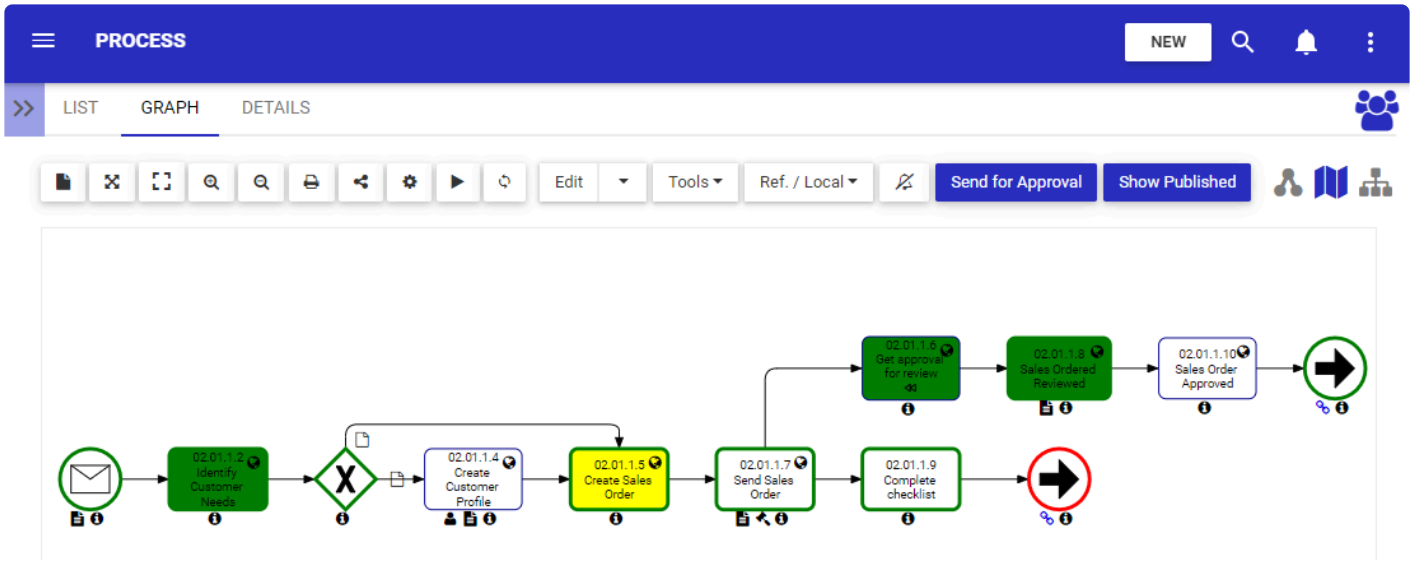
4) Select ‘Value Added’



5) Click on ‘Save Changes’



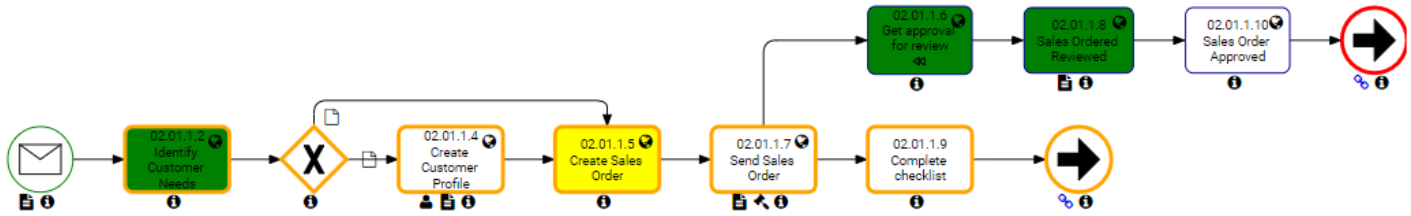
6) Review the Results


PROCESS
NEW
LIST
GRAPH
DETAILS
Edit
Tools
Ref. / Local
Send for Approval
Show Published
02.01.1.2 Identify Customer Needs
02.01.1.4 Create Customer Profile
02.01.1.5 Create Sales Order
02.01.1.7 Send Sales Order
02.01.1.6 Get approval for review
02.01.1.8 Sales Ordered Reviewed
02.01.1.10 Sales Order Approved
02.01.1.9 Complete checklist

4.4.3.2.5.7.4 My Tasks

The highlight function allows you to highlight the Critical Path, the High Risk Path, or tasks that are Value Added. Addtionally, tasks to which a resource or a role that is linked to your user account can be highlighted as well.

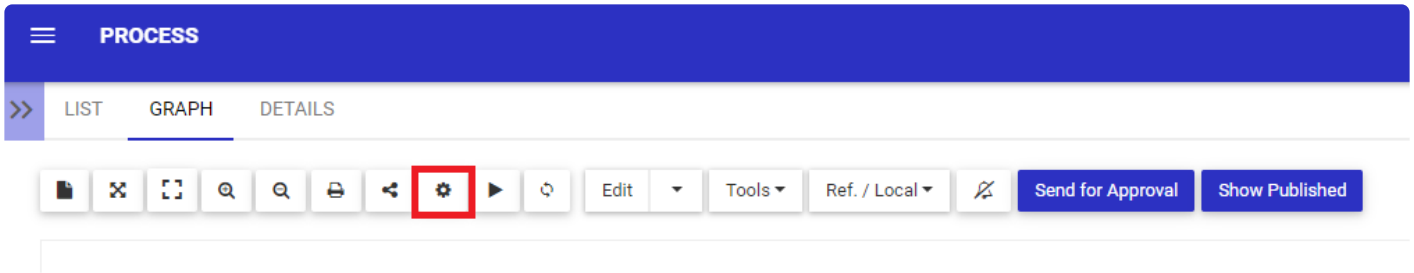
My Tasks [R]: Flow objects that are assigned to you via a resource or a role will be highlighted in the process map. Note that only flow objects for which you are RESPONSIBLE for will be highlighted.



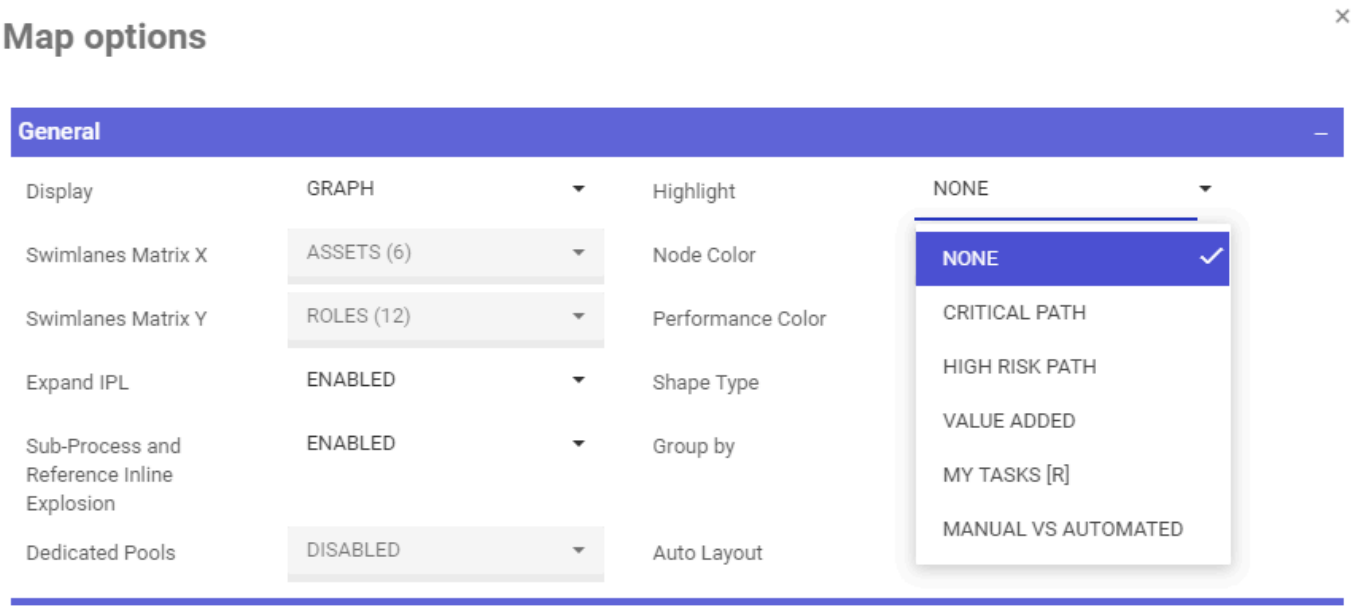
To enable ‘My Tasks’:

1) Navigate to the process you wish to view

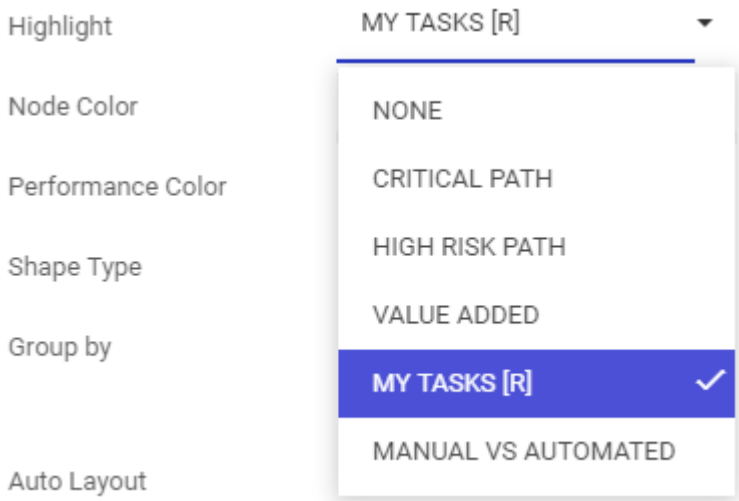
2) Select the ‘Settings’ Icon



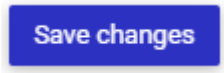
3) Click on the ‘Highlight’ dropdown



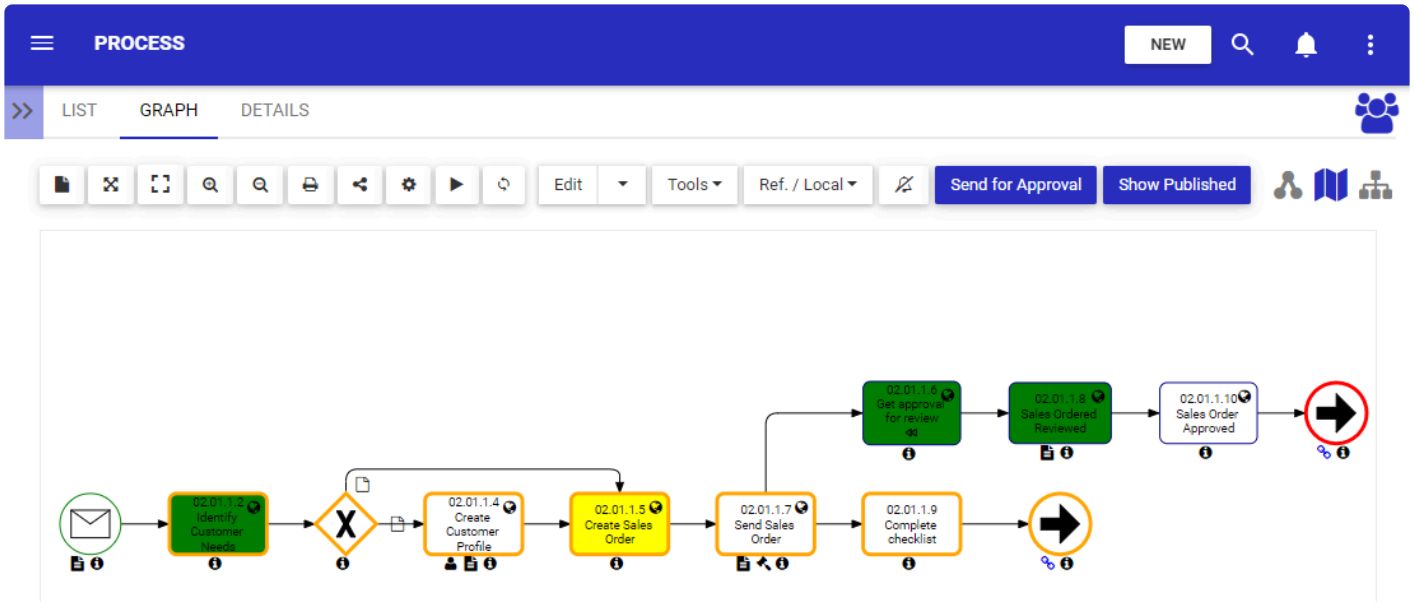
4) Select 'My Tasks ®'



5) Click on 'Save Changes'



6) Review the Results

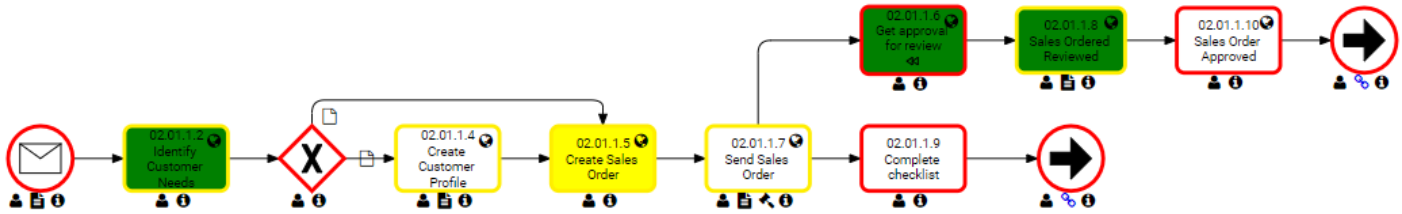

PROCESS
NEW
LIST
GRAPH
DETAILS
Edit
Tools
Ref. / Local
Send for Approval
Show Published
02.01.1.2 Identify Customer Needs
02.01.1.4 Create Customer Profile
02.01.1.5 Create Sales Order
02.01.1.7 Send Sales Order
02.01.1.6 Get approval for review
02.01.1.8 Sales Ordered Reviewed
02.01.1.10 Sales Order Approved
02.01.1.9 Complete checklist

4.4.3.2.5.7.5 Manual vs. Automated

The highlight function allows you to highlight the Critical Path, the High Risk Path, or tasks that are Value Added. Addtionally, tasks to which a resource or a role that is linked to your user account can be highlighted as well as the Manual or Automated Tasks.

Manual Vs Automated: Indicates the automation level of an activity. Highlighted in red are tasks which require human input (manual activity), highlighted in yellow are activities which require human input but are assisted by a system (semi-automated activity) and highlighted in green are activities which require no human input and is fully automated by a system (automated). The flow object will be highlighted depending on whether an asset, role, resource or org unit is assigned to it. Refer to the table below for the RASCI-VS assignment rules for the highlighting.

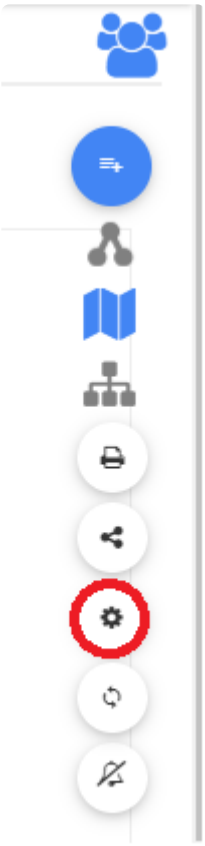
Color	RASCI-VS Assignment
GREEN	Asset [R] or/and [Su]
YELLOW	Asset [R] or/and [Su] + Role/Resource/Org Unit [R]
RED	Role/Resource/Org Unit [R]



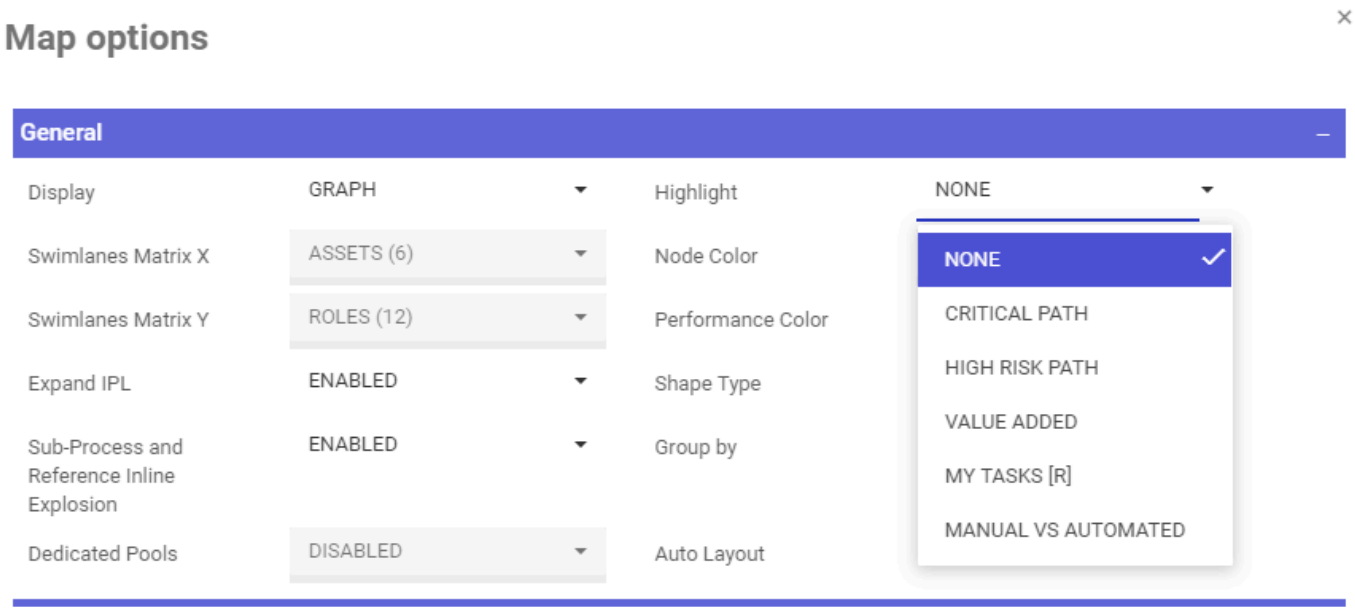
To enable ‘Manual Vs. Automated’:

1) Navigate to the process you wish to view

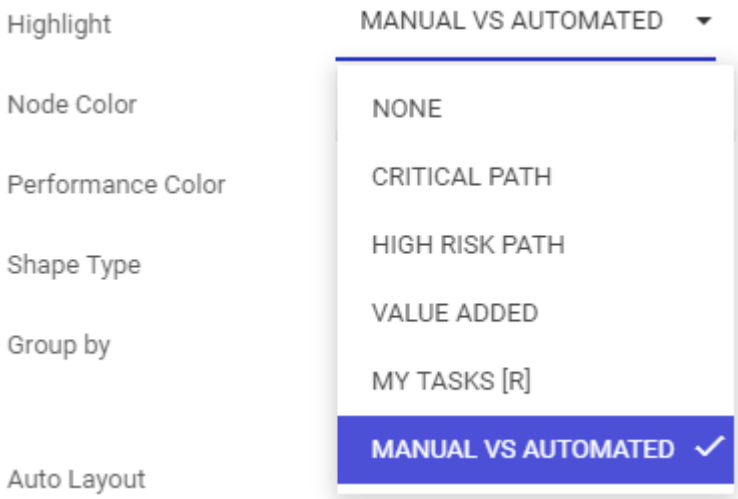
2) Select the ‘Settings’ Icon



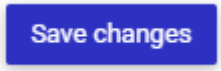
3) Click on the ‘Highlight’ dropdown



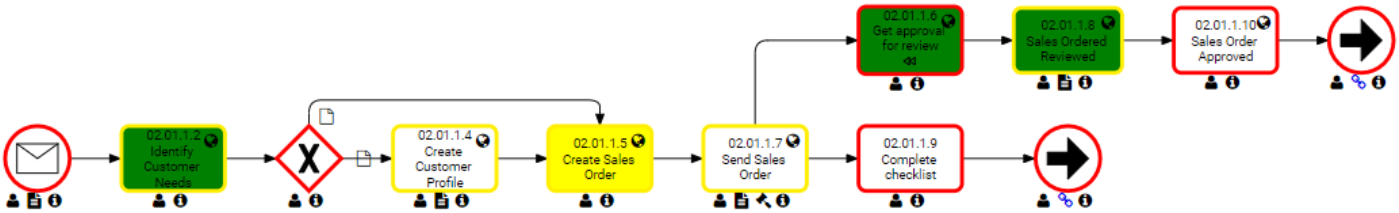
4) Select ‘Manual Vs. Automated’



5) Click on 'Save Changes'



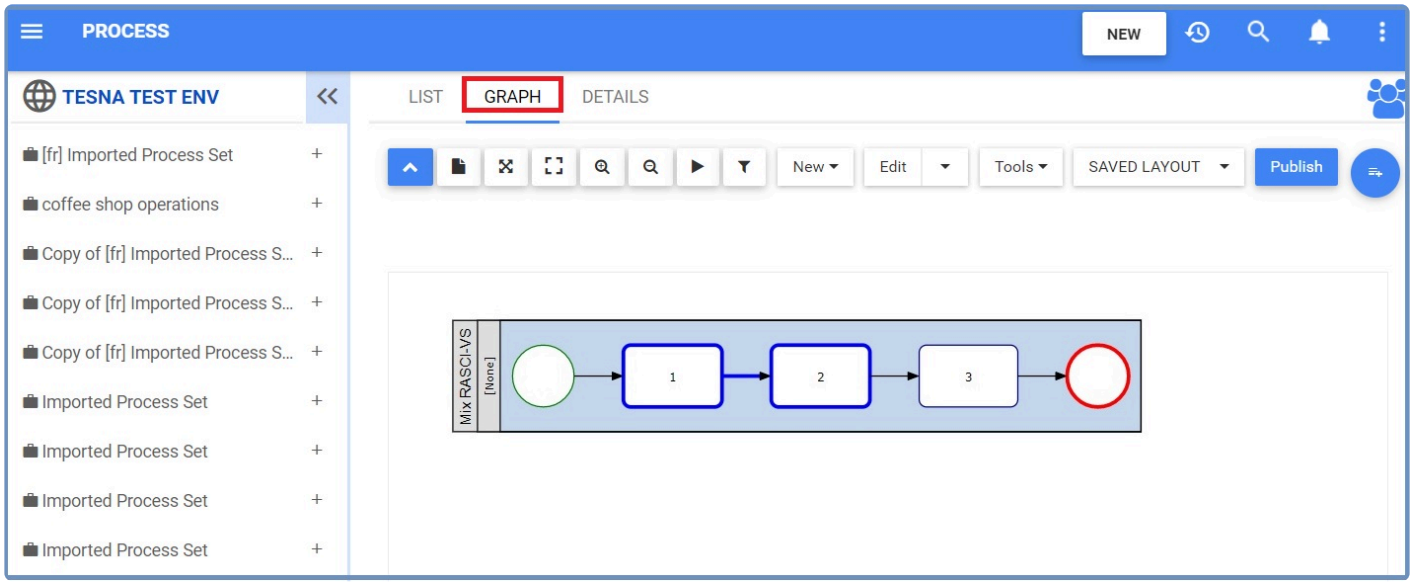
6) Review the Results



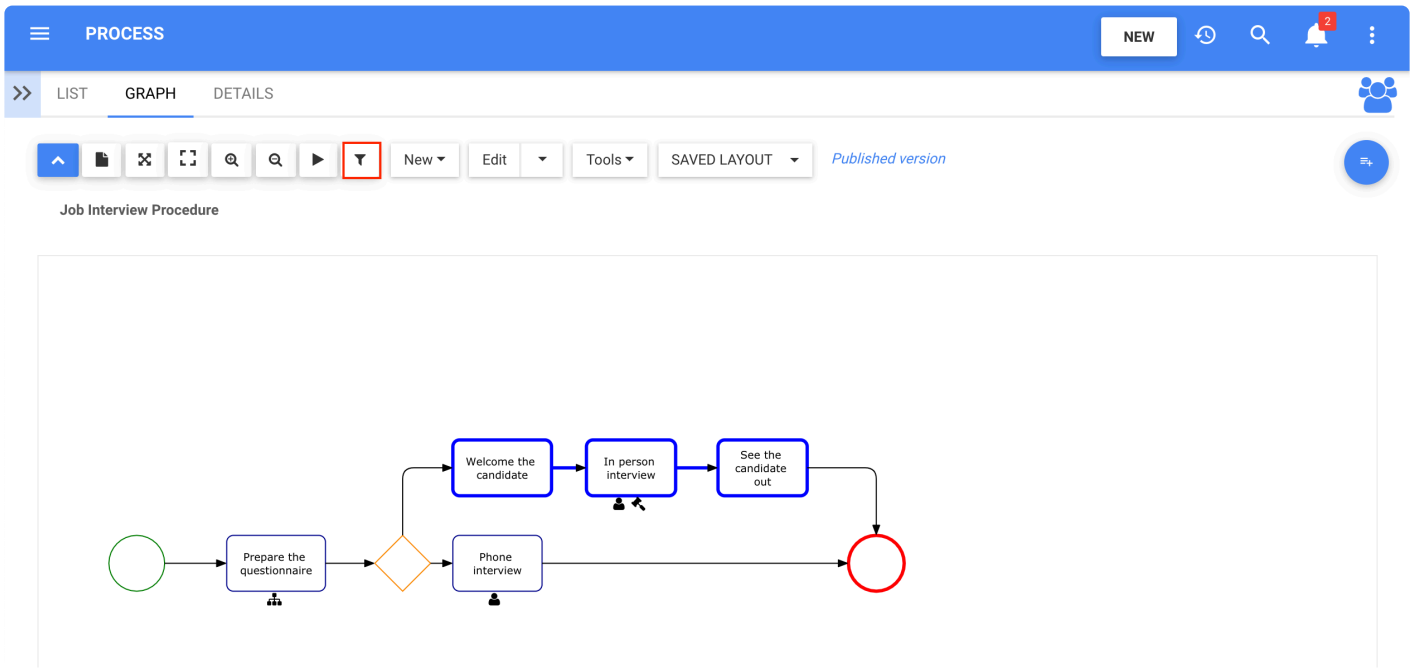
4.4.3.2.5.7.6 Highlight “Happy Path“ Filter

This Highlight Happy Path Filter button allows users to filter between the Normal to Critical path and from Critical path to Normal.

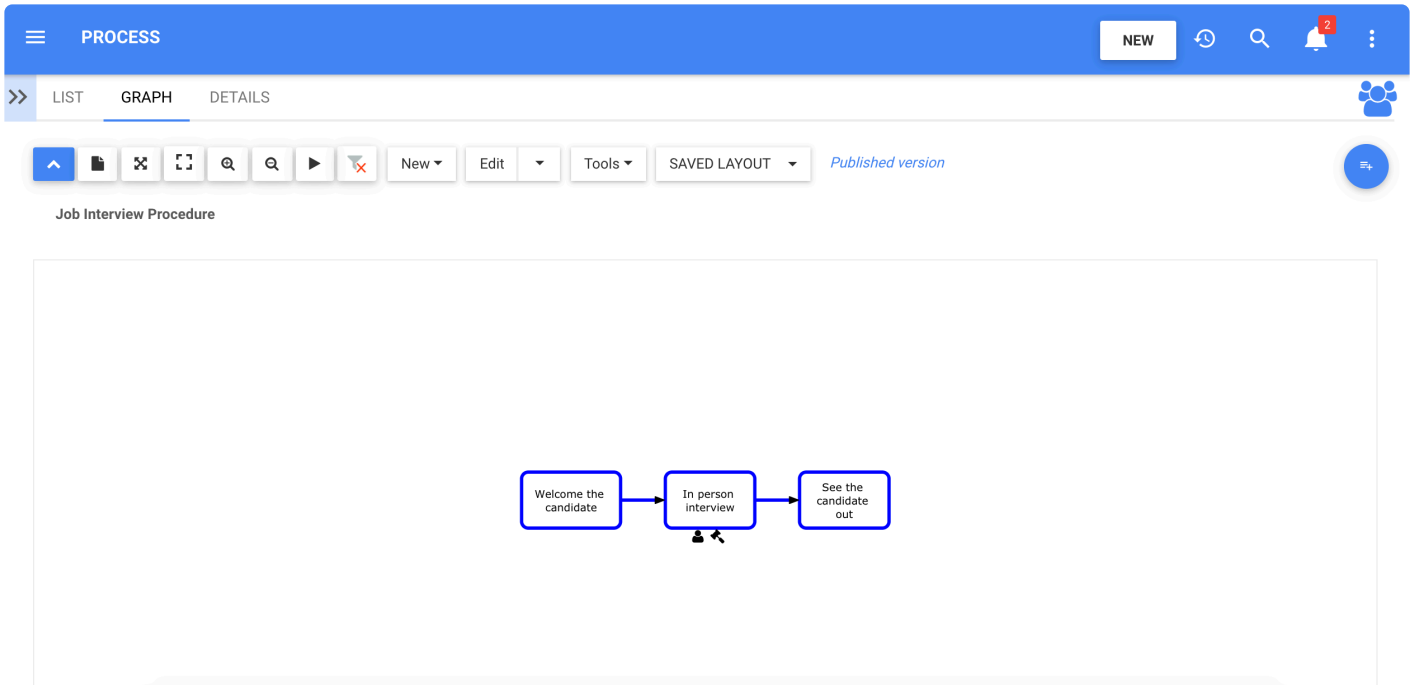
1. Navigate to the Graph Page of the process module.



2. Click on the Filter button.

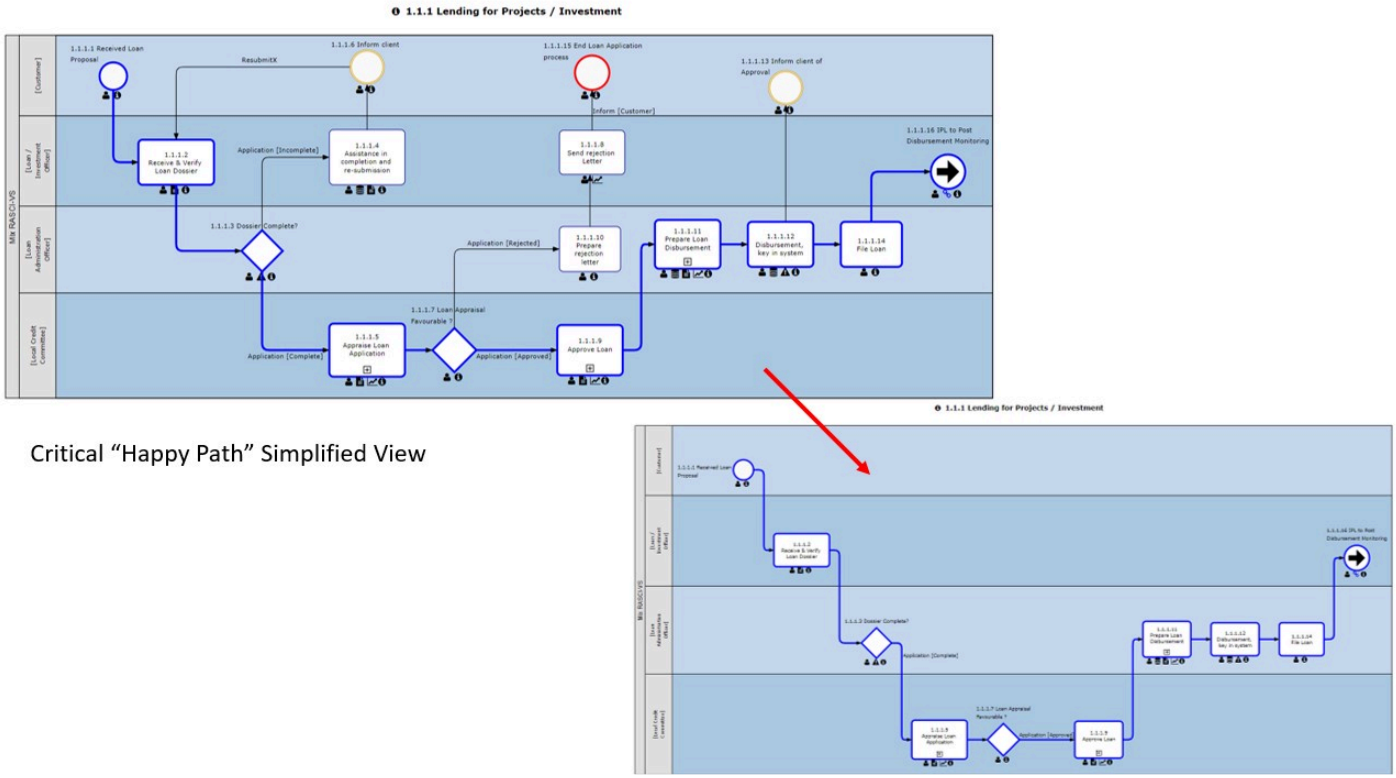


3.When you click on the Filter button the Critical Path will appear.



4.You can filter the map view from Normal to Critical path and from Critical path to Normal.

Here’s a real use case example:



Critical “Happy Path” Simplified View

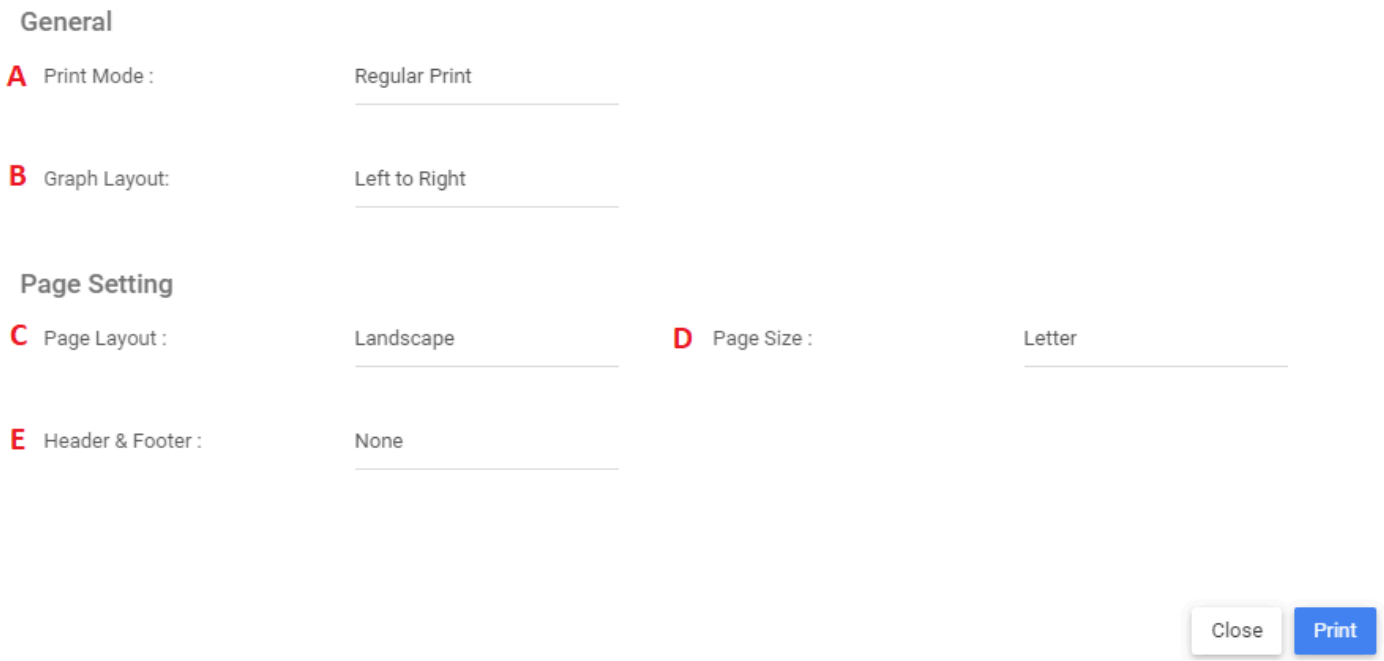
4.4.3.2.6 Map Graph Printing

Users are able to print their Map Graphs by clicking on the Print button on the toolbar. See Instructions below.

There are 2 Print Modes from which the user can choose, see Manual Print and Dynamic Print

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



	Setting	Options	Description
A	Print Mode	a. Manual Print b. Dynamic Print	Leaves the map as is Adjusts the map according to settings choices
B	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)
C	Page Layout	a. Landscape b. Portrait	Landscape (“Sideways”) page orientation Portrait (“top-Down”) page orientation
D	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)
E	Header & Footer	a. None b. Header & Footer	No header & footer on the printed page Pre-designed header & footer displayed on the printed page

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

4.4.3.2.6.1 Manual Print

Users can easily print process maps using EPC's Manual Print capabilities. Manual printing allows users to re-organize their process maps and select desired content for print. Users have the ability to:

1. Select print area
2. Add / Remove any number of print pages
3. Resize print pages
4. Re-Organize the print areas
5. Preview print layout

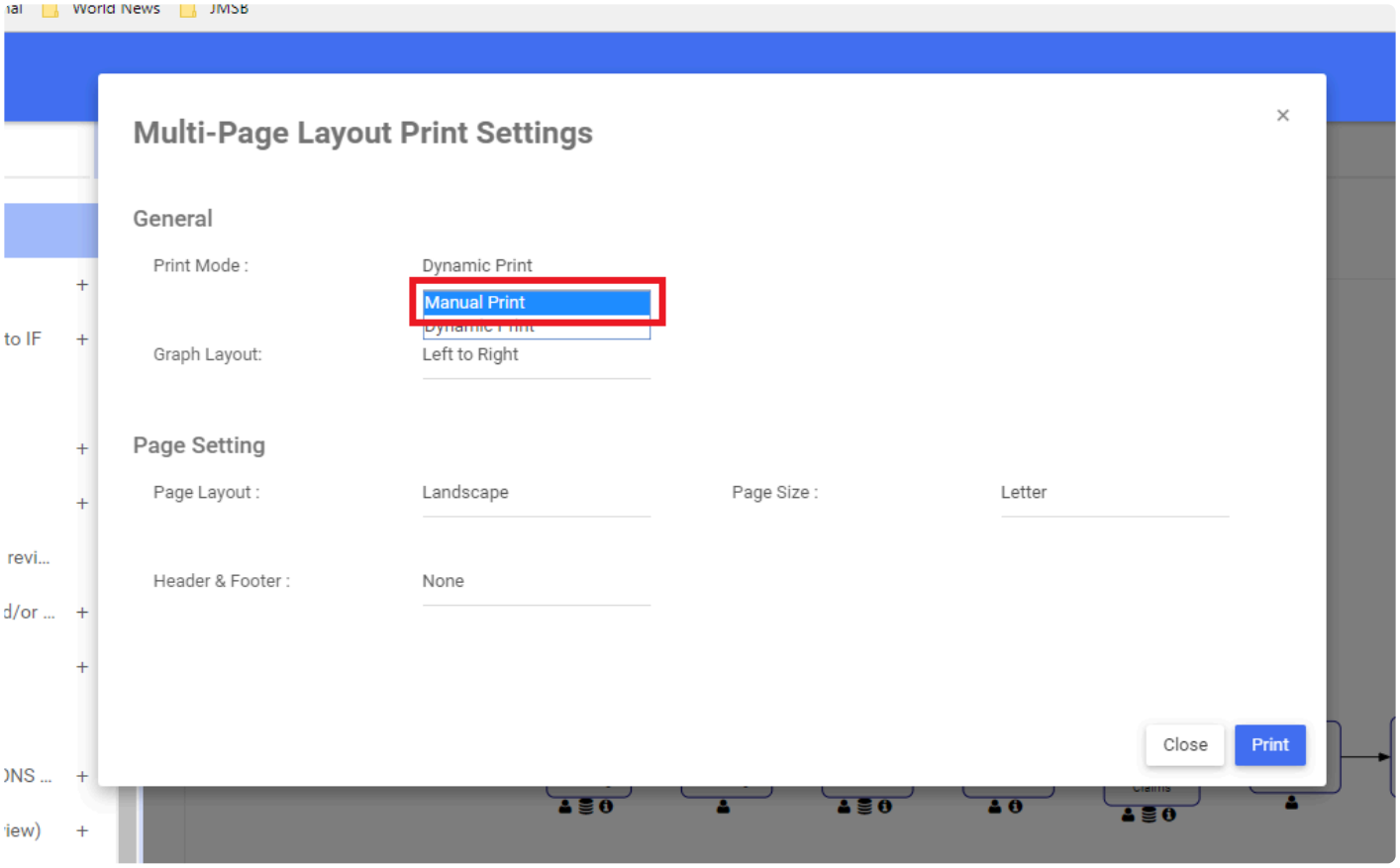
> Note, all reorganization done for printing will not affect the existing layout of your process maps.

To use EPC's Manual Print:

1) Navigate to the process you wish to print

2) Select the **Print** icon

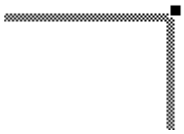
3) Within the panel, select **Manual Print**

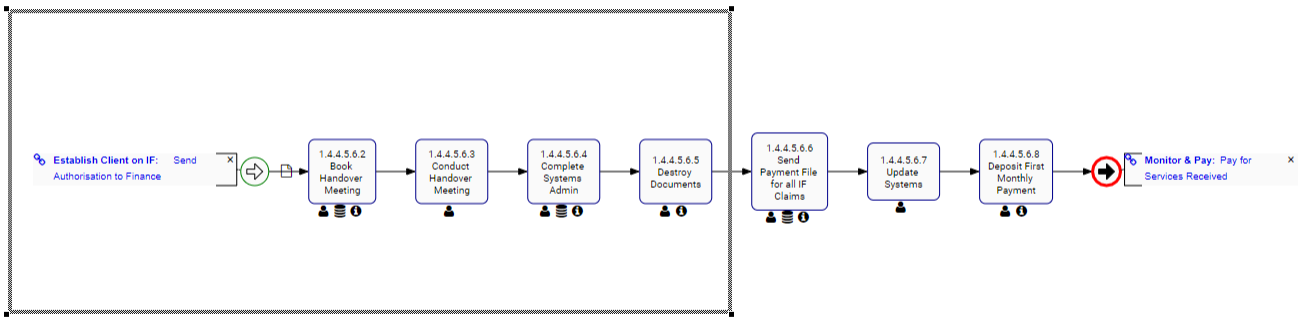


4) Select **Print**

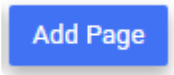
5) A window will open with the print area selector

6) To resize the print area, hover your mouse on the corner of the page box, click and drag to resize the page to the desired size

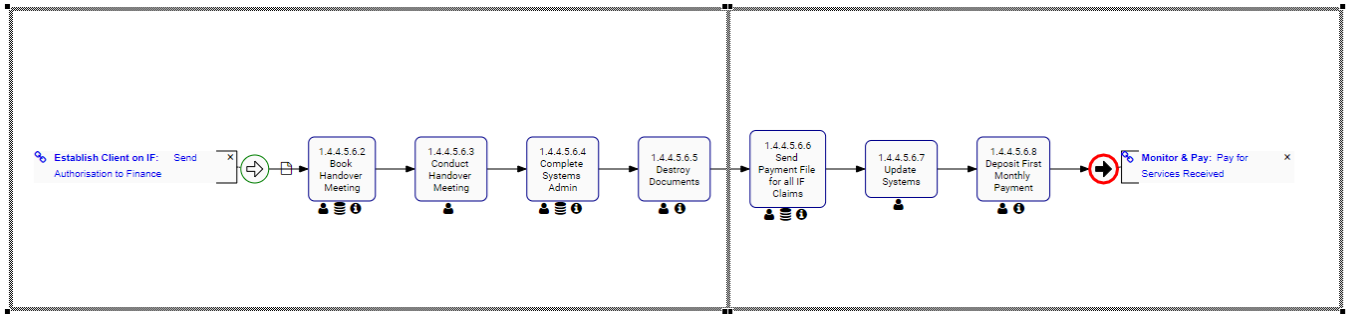




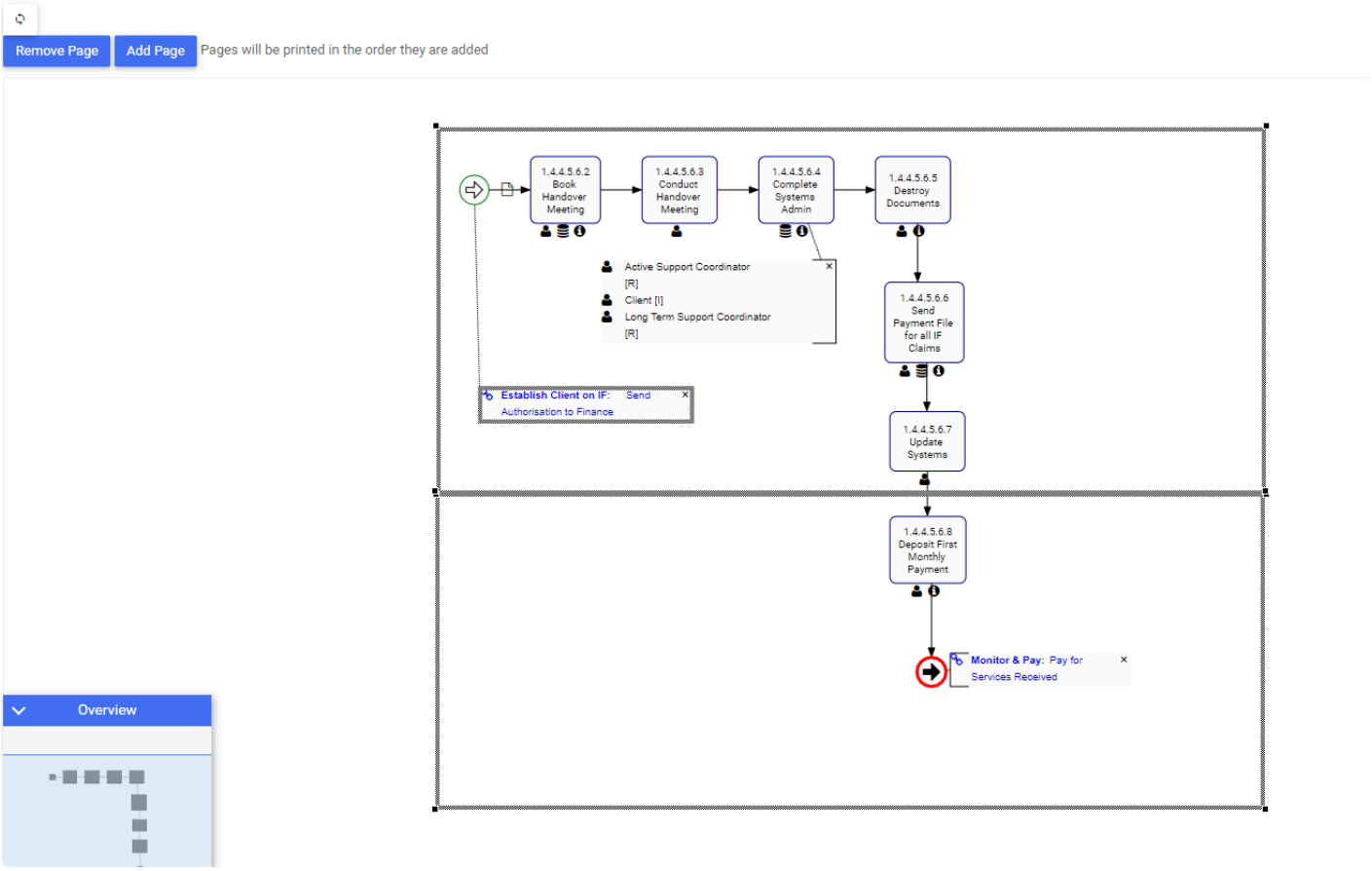
7) To add a page, select the **Add Page** button



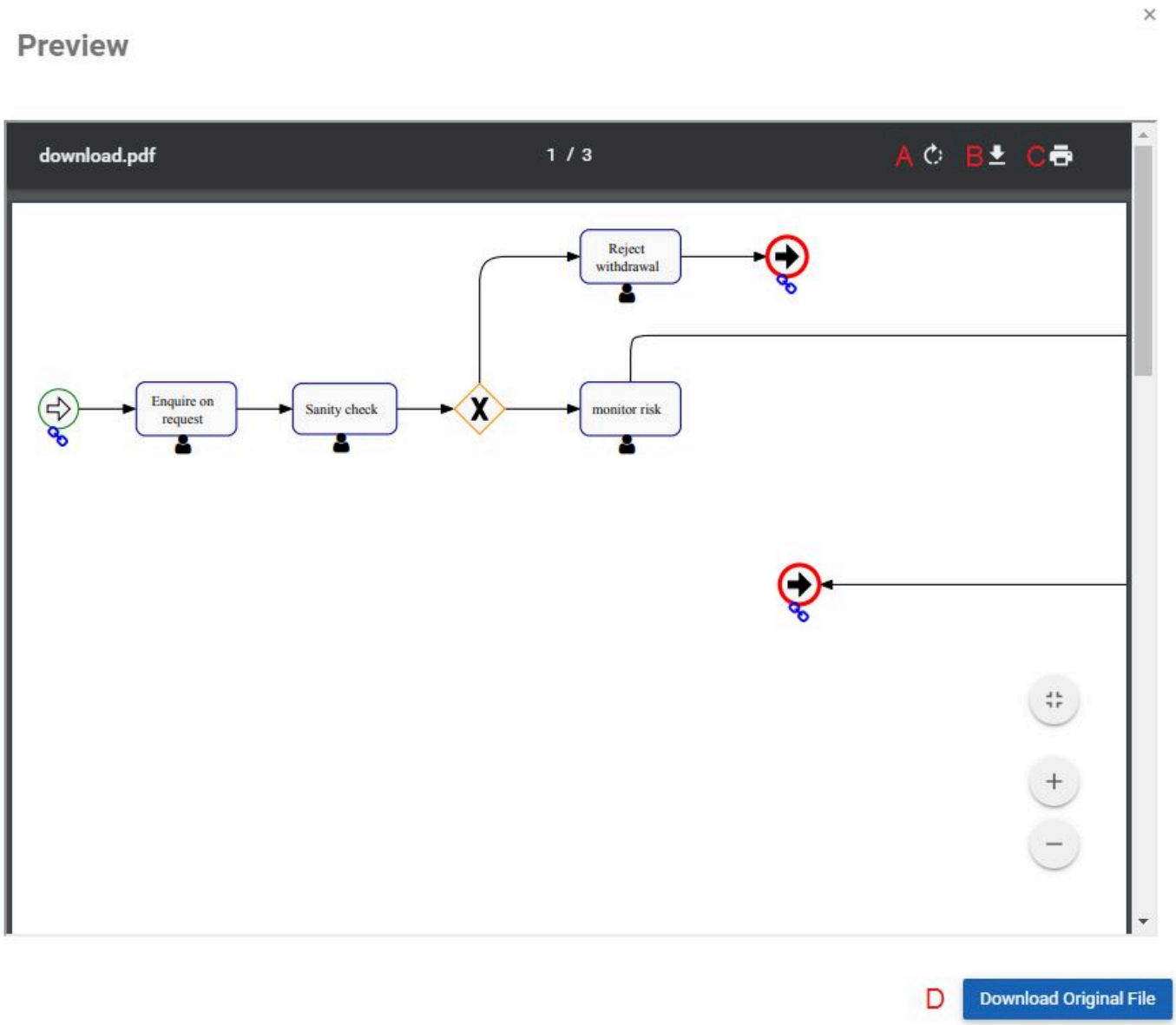
8) Drag and resize the added page



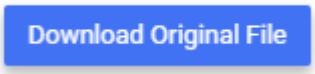
9) To re-organize the content of the page, select and drag the flow shapes to the desired position. You may also expand/collapse icons, and drag and re-organize annotations.



10) Select print and your process map will be previewed



11) Select “Download Original File*



From here you can download the Process Map as a PDF, and can follow typical document printing procedures.

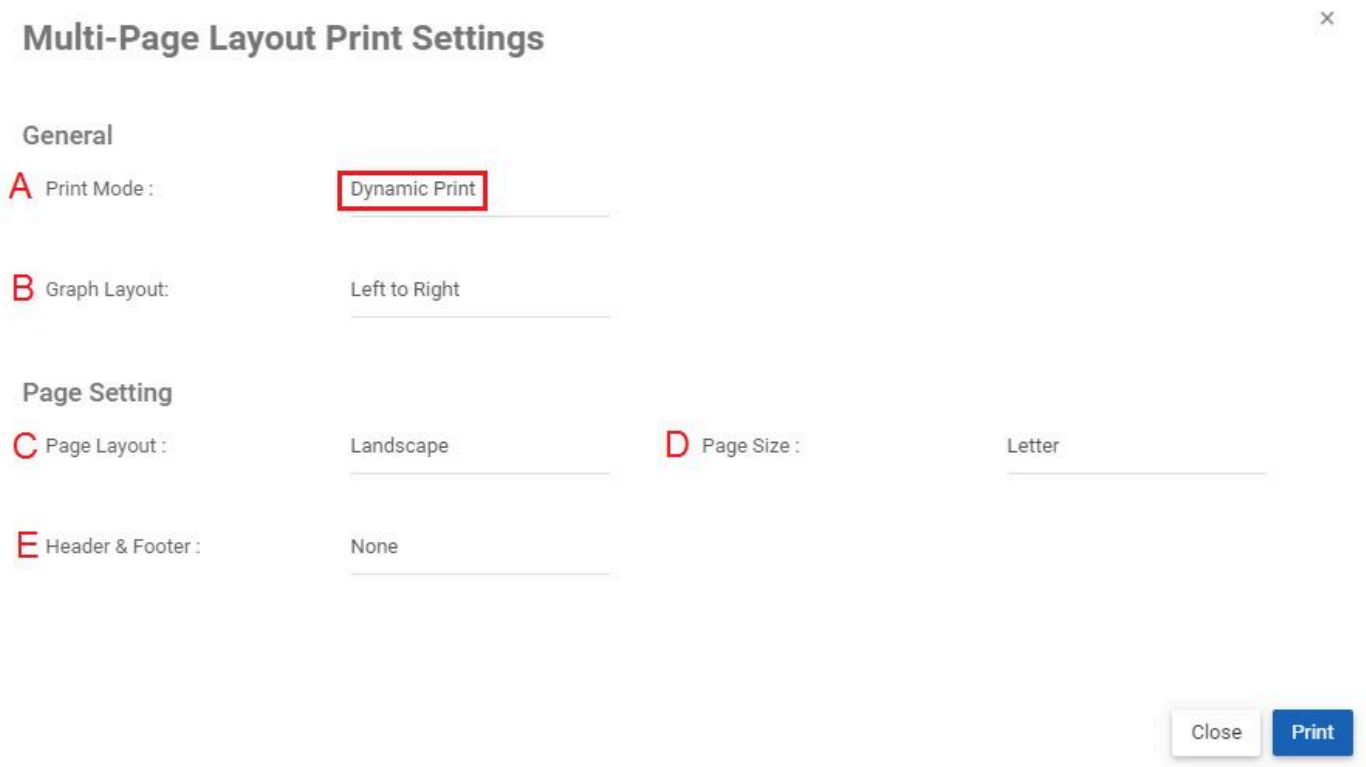
4.4.3.2.6.2 Dynamic Print

The goal of Dynamic Print is to allow users to print entire process maps while minimizing manual input or readjustment. It automatically re-positions maps to fit within 1 or many pages depending on the size of the process and the user settings. Like Regular Print, users can re-position flow objects and transitions within each page and the layout will be automatically re-adjusted. However, unlike Regular Print, Dynamic Print will automatically add pages (clipping rectangles) to fit the process and these 'clipping rectangles' are not movable. See below for instructions on Dynamic Print

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

2. A print settings panel will be displayed. Select Dynamic Print as the Print Mode. See the Table below for print settings options.

> ! Dynamic print is not compatible with Swimlane or Swimlane Matrix modes.

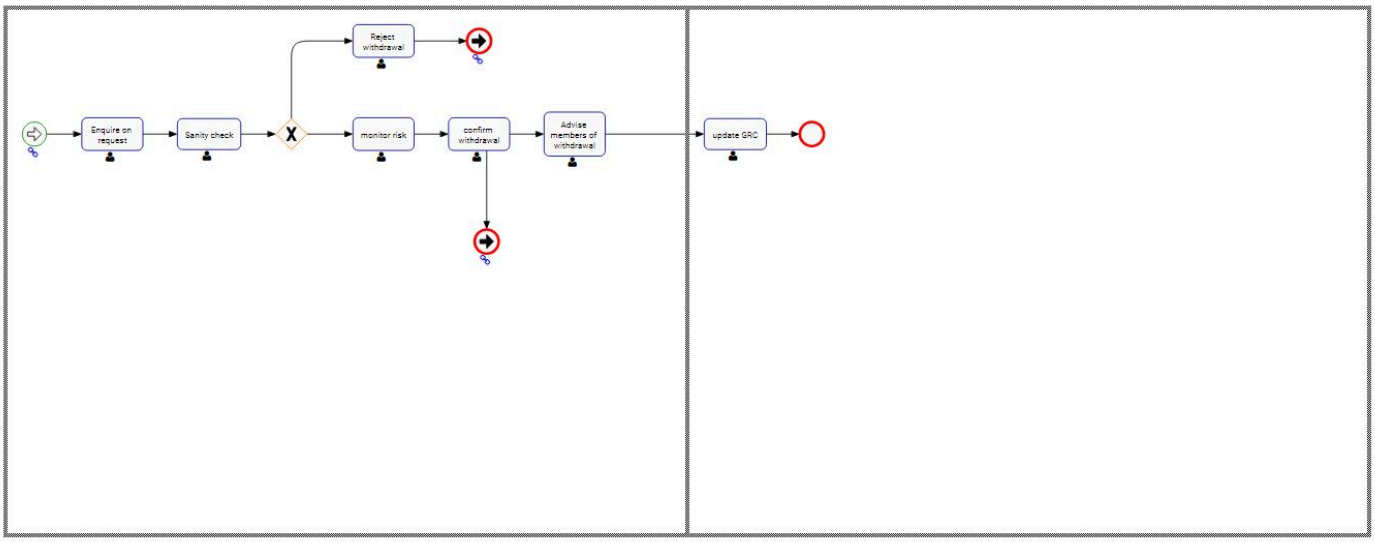


	Setting	Options	Description
A	Print Mode	a. Manual Print b. Dynamic Print	Leaves the map as is Adjusts the map according to settings choices
B	Graph Layout	a. Left to Right	Sideways layout of graphic being printed (multipage)

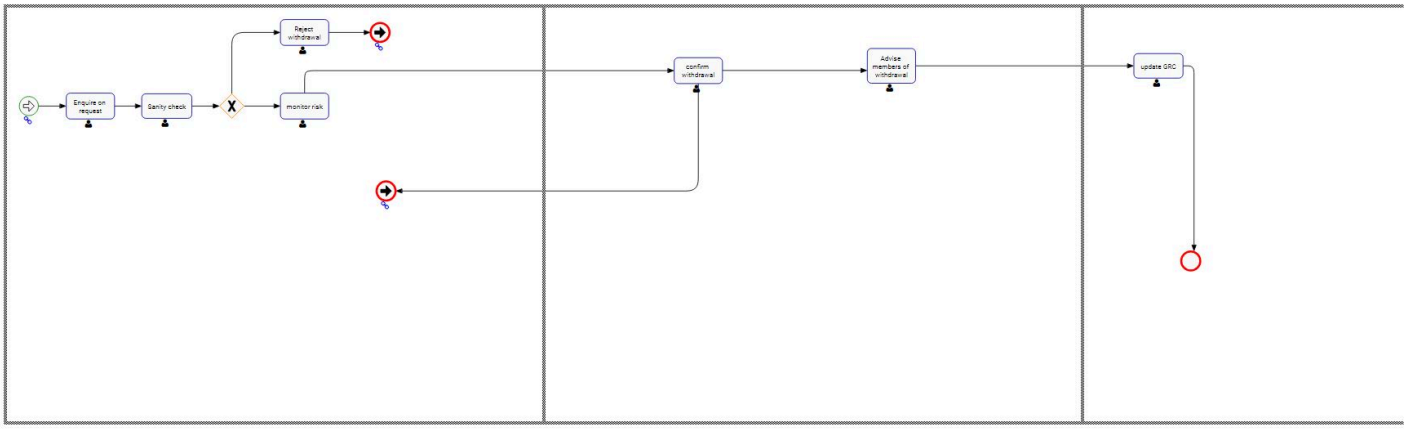
		b. Top to Bottom	Top-down layout of graphic being printed (multipage)
C	Page Layout	a. Landscape b. Portrait	Landscape (“Sideways”) page orientation Portrait (“top-Down”) page orientation
D	Page Size	a. Letter b. Legal c. A3 d. A4	8.5 × 11.0 in (216 × 279 mm) 8.5 × 14.0 in (216 × 356 mm) 11.7 × 16.54 in (297 × 420 mm) 8.3 × 11.7 in (210 × 297 mm)
E	Header & Footer	a. None b. Header & Footer	No header & footer on the printed page Pre-designed header & footer displayed on the printed page

! Enabling Headers and Footers may cause some problems with printing depending on the layout of the map.

3. Select the desired print settings and click the print button.

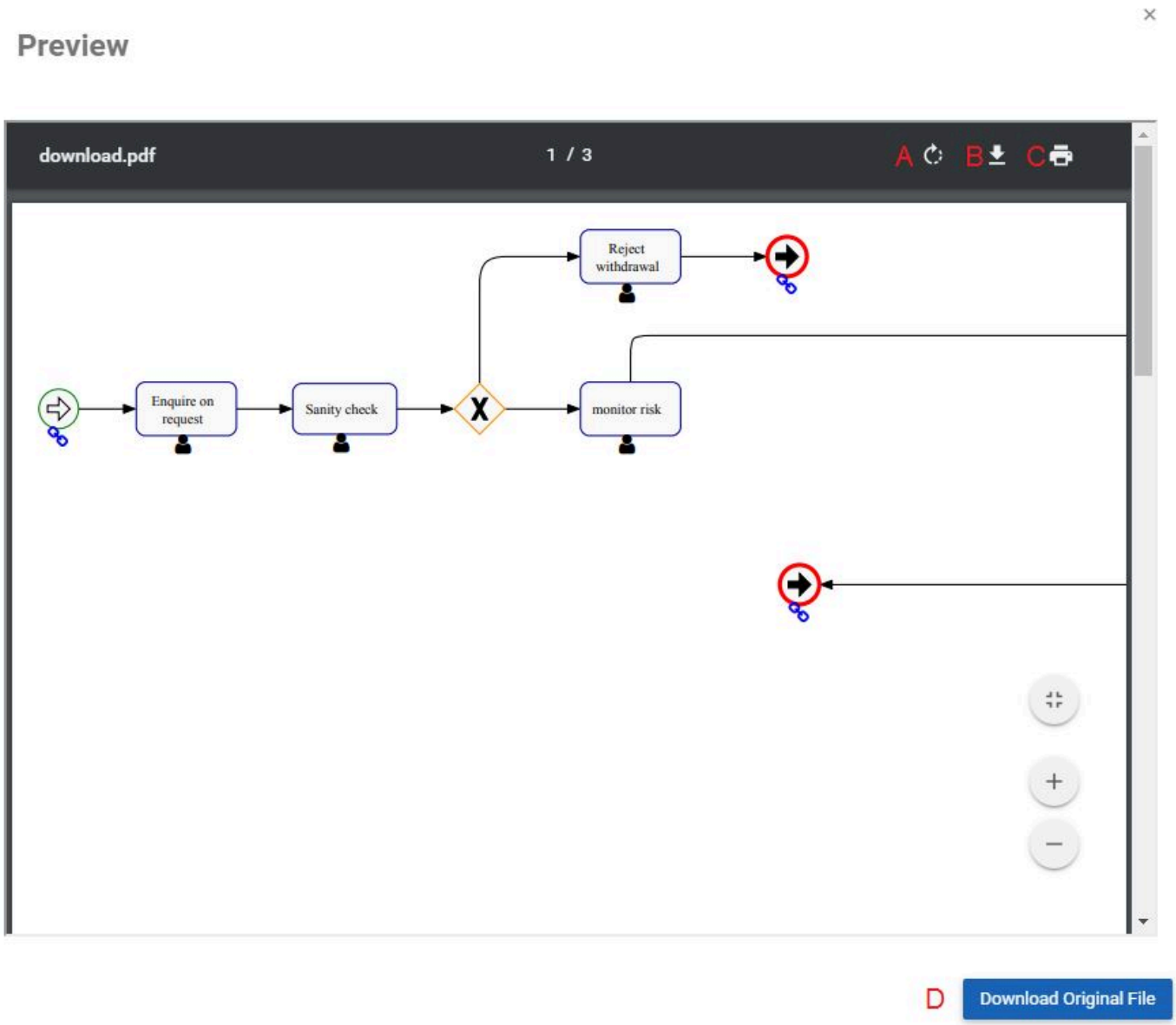


4. The ‘Add Page’ button on the top left corner will add a page to the map. While Dynamic Print already fits the process within 1 or many pages automatically, users have the option to add pages and drag flow objects around.



5. The Print Preview page will appear. From here you can download your Process Map or send it to your printer as a PDF file.

> Make sure ‘Fit to Page’ is selected in your browser printer settings

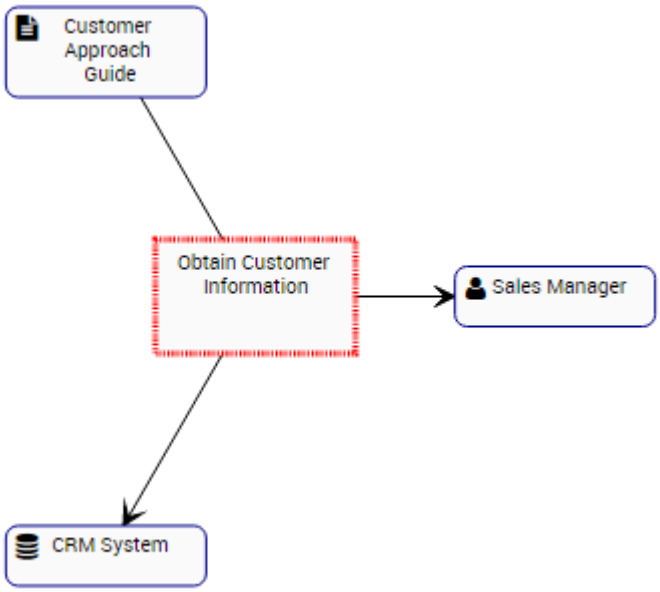


A	Rotate Clockwise	Rotates the map clockwise
B	Download File	Downloads the File to your PC
C	Print Settings	Change your printer settings before you print the Map
D	Download Original File	Directly downloads the file to your PC

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.

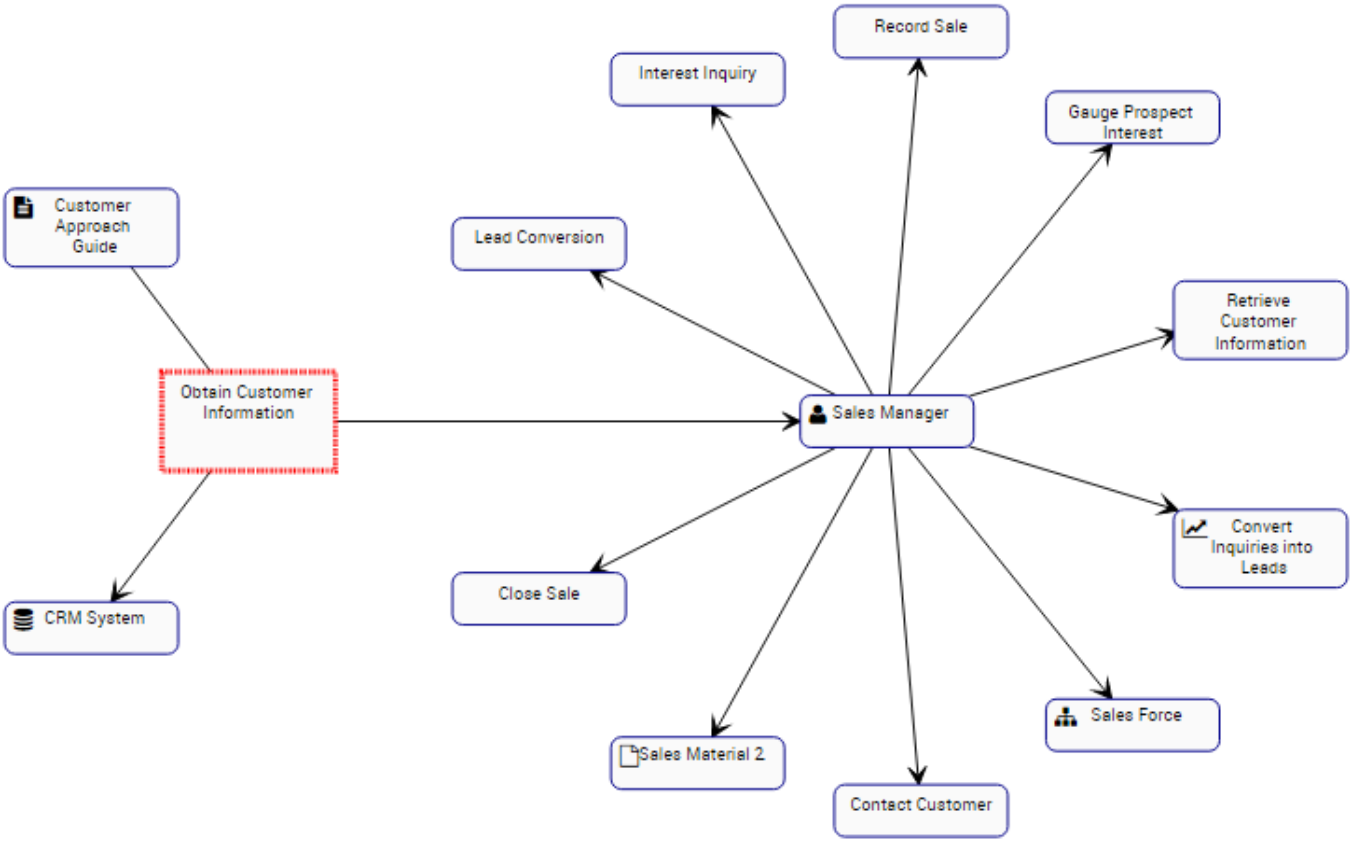
Impact Graph



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.

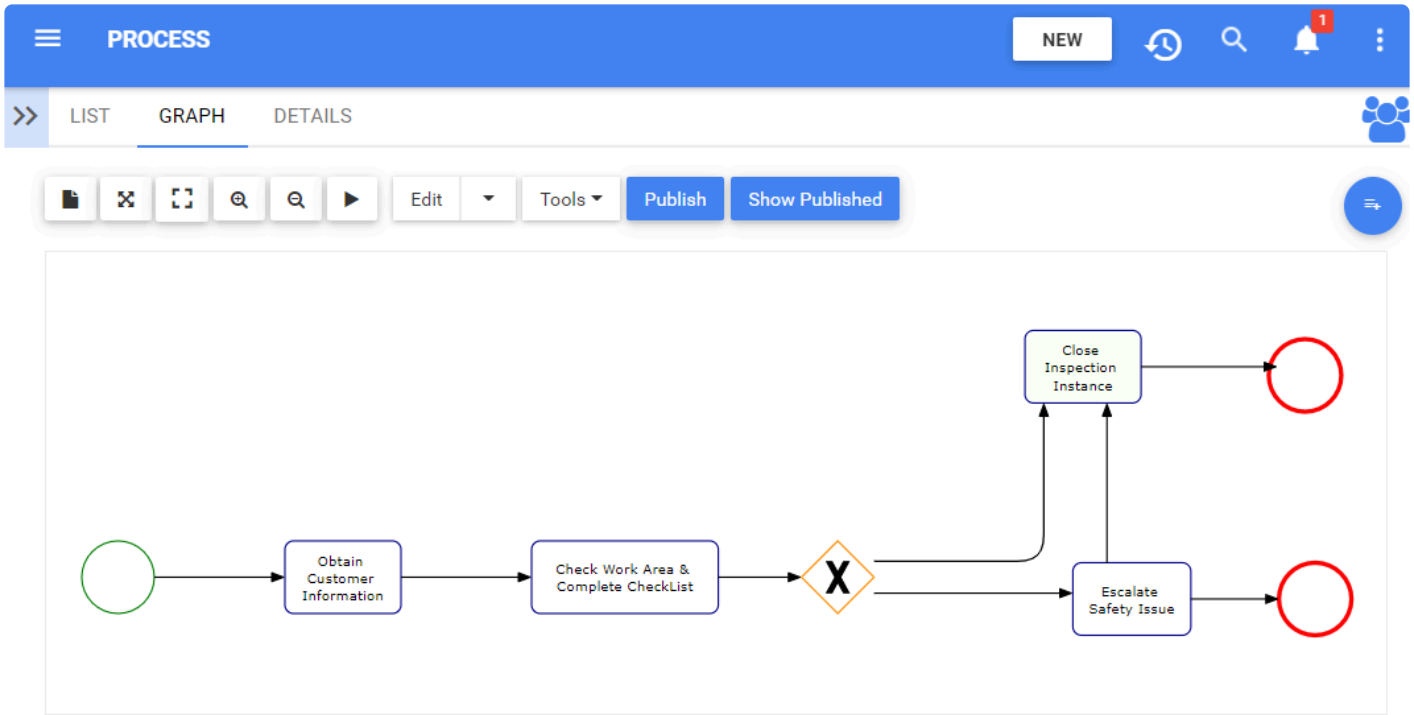


These Impact Graphs can be used to educate business users, to analyze internal business processes and help management optimize activities effectively. Additionally, they help in the preparation of change management plans, allowing managers to map out the effect of any organizational change.

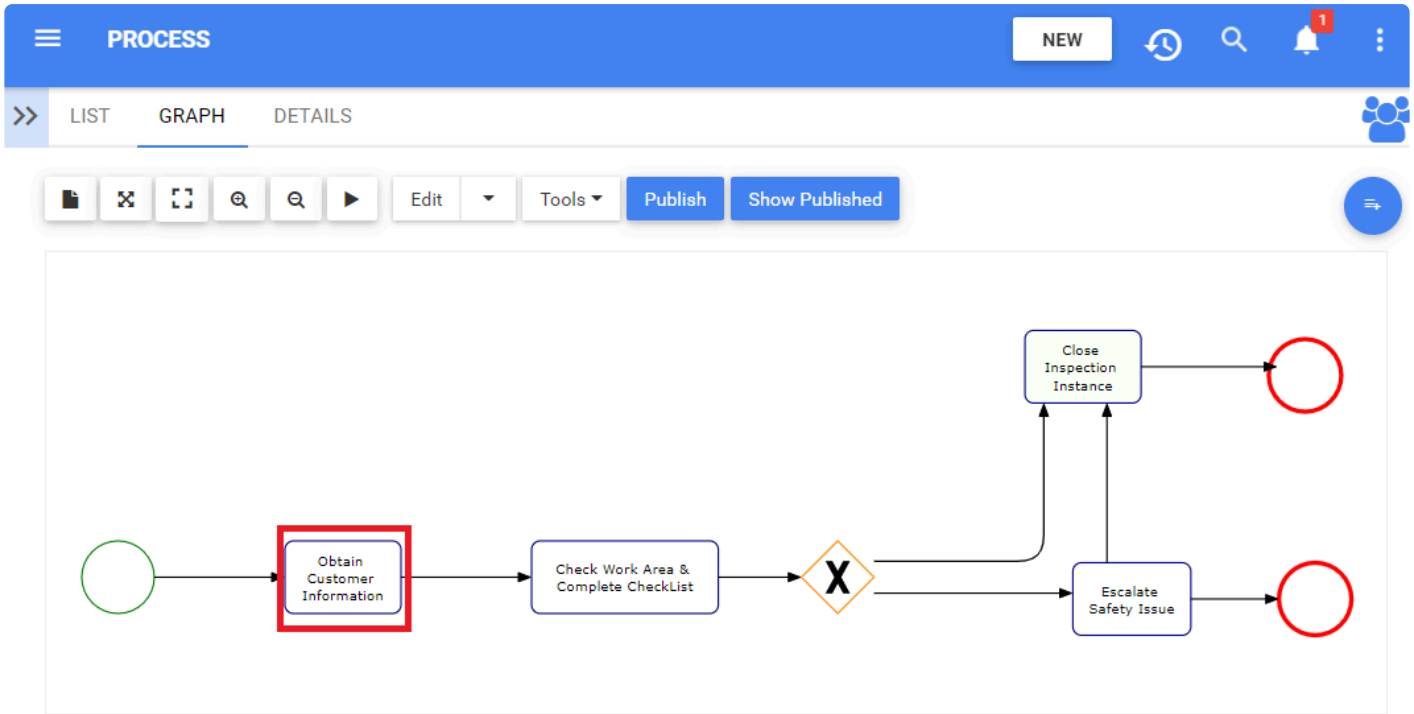
Impact Graph Navigation

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

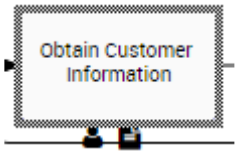
1. Navigate to the Graph tab



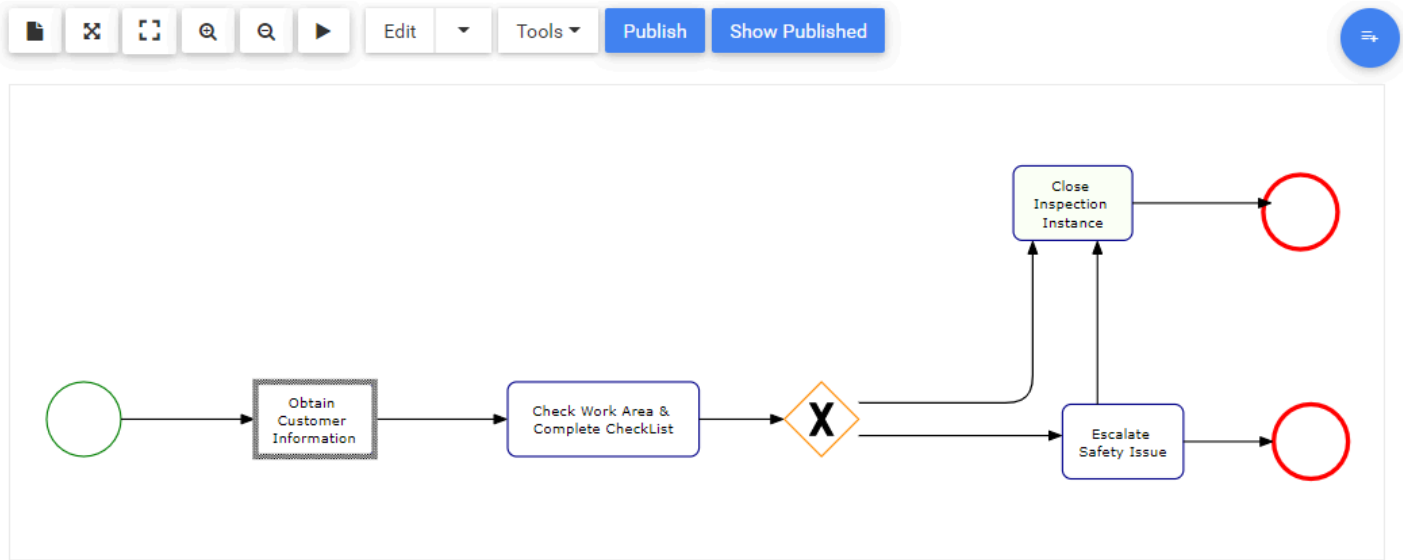
2. By default, a user will be navigated to the Processes Map Graph. To view a specific item's Impact Graph, a user must **select** the item prior to navigating to the Impact Graph view. For this example, we will select "Obtain Customer Information" task by clicking on the item



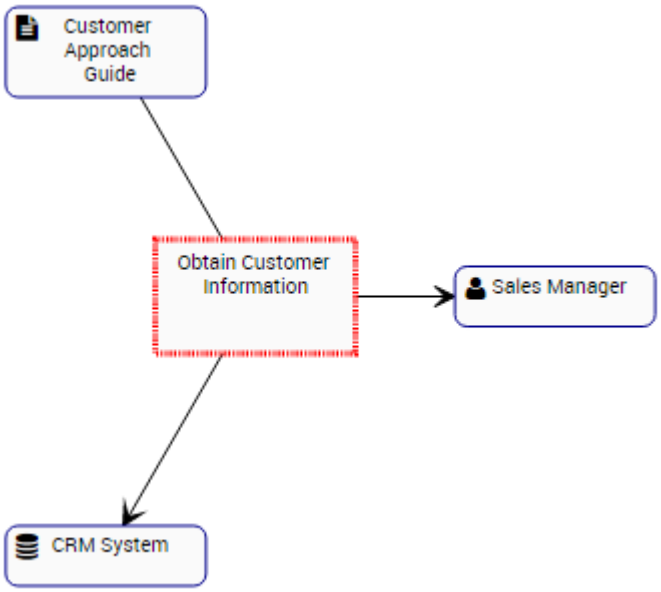
3. Once the item is selected it will be highlighted and will display the following



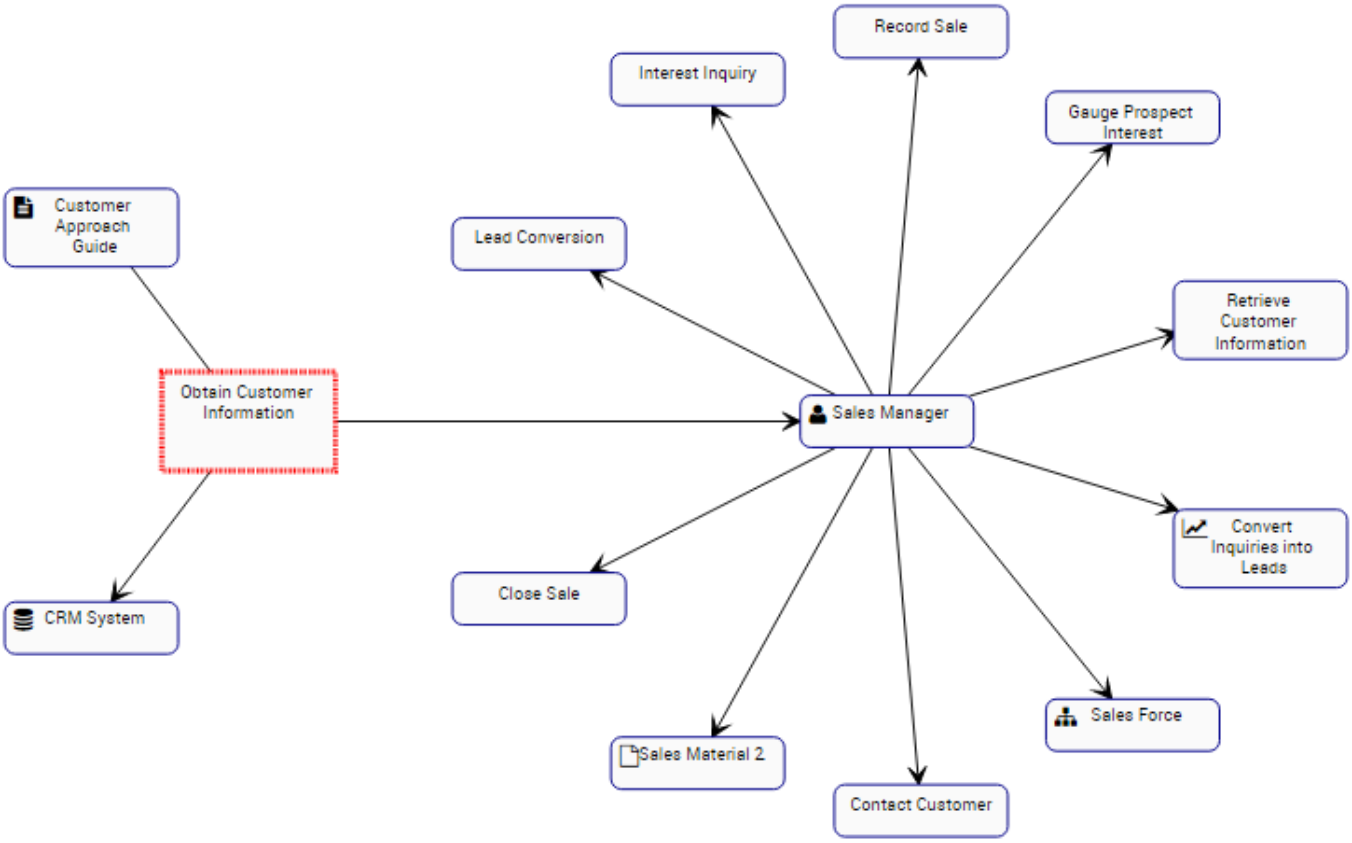
4. Now select the Impact Graph icon



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



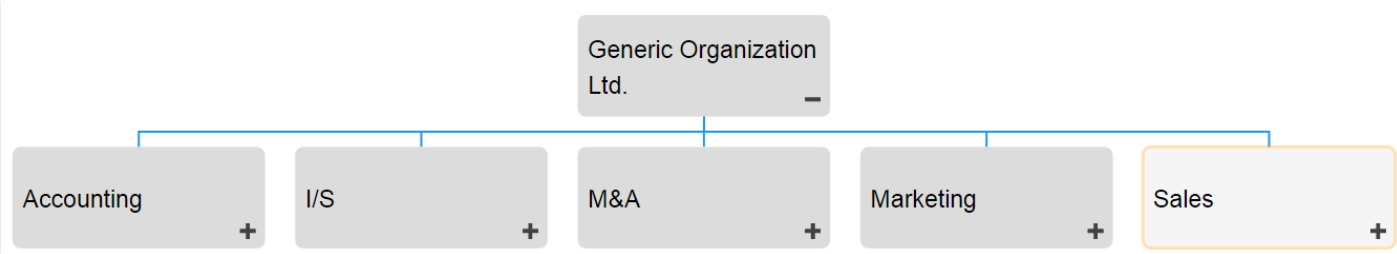
6. (Optional) To further expand the Impact Graph, simply double-click on the item you would like to expand


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

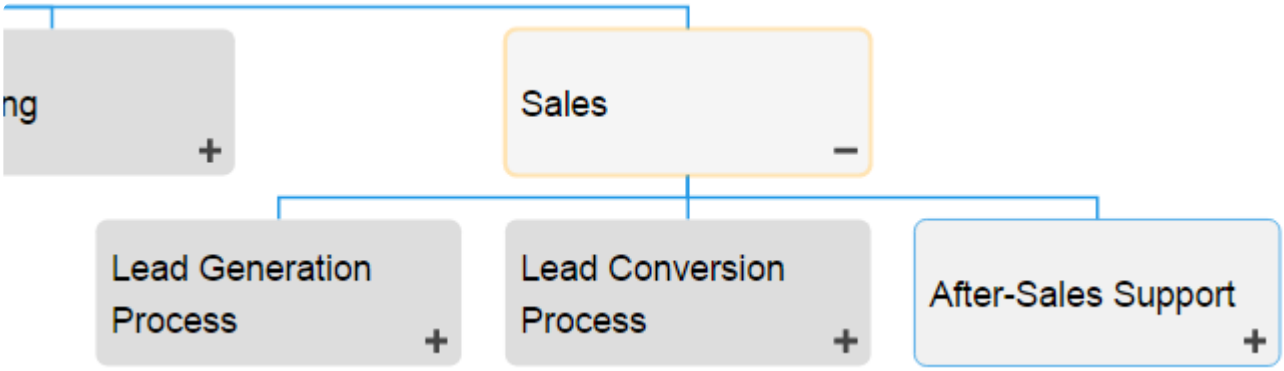
4.4.3.4 Hierarchy Graph

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

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



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



Hierarchy Graph Navigation

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

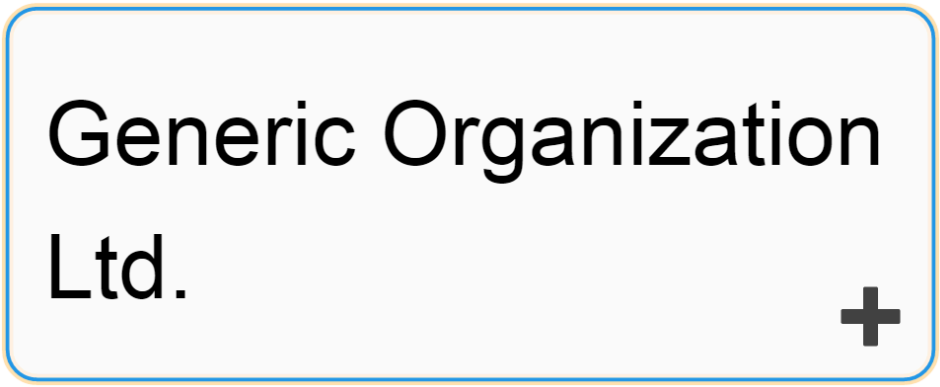
1. Navigate to Process Module

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

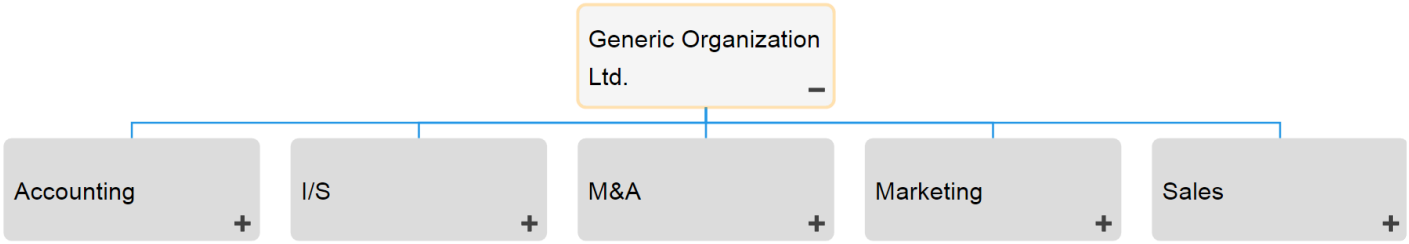
> The further you navigate into processes, the more you limit the scope of Hierarchy Graphs. To view a complete picture of the organizational structure of processes, select “Process Sets”

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

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

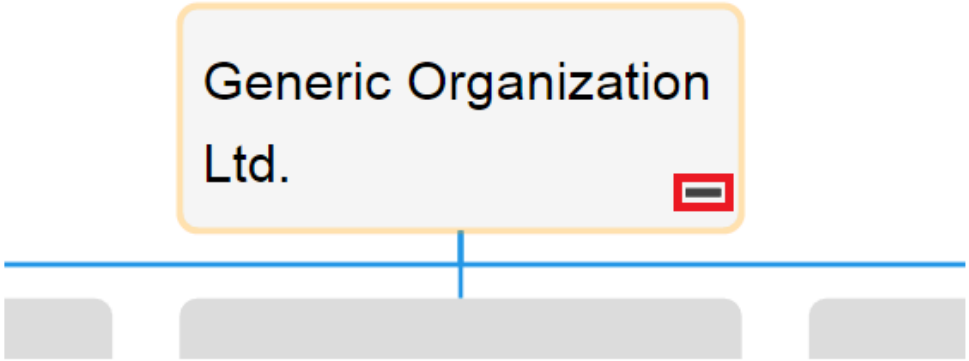


5. To further expand components of the Hierarchy Graph, double click on the on the objects in the Graph. This will expand the item selected.



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

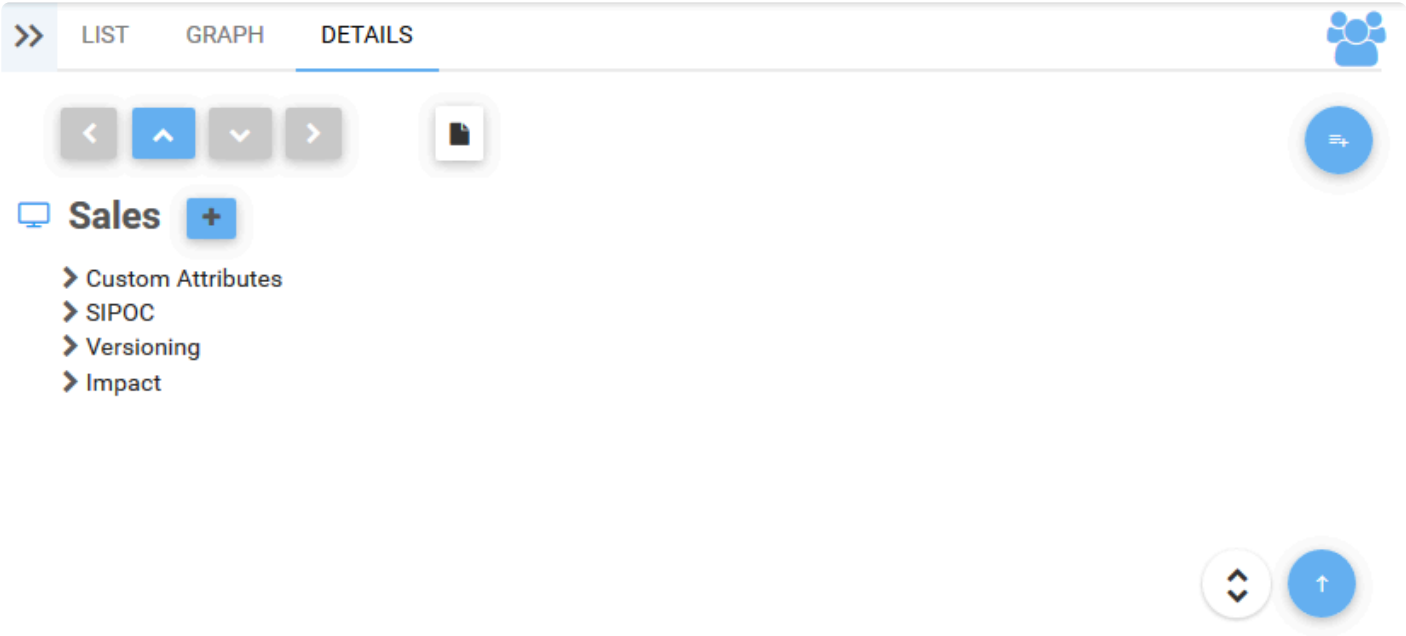
7. To close opened items, double-click on the icon


Generic Organization Ltd.

4.4.4 Details

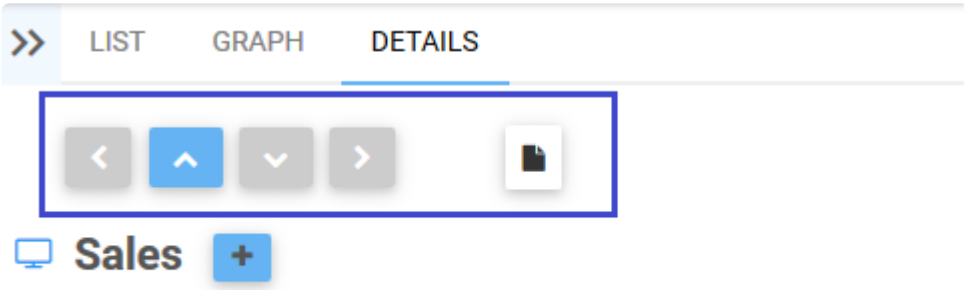
The Description section is where you will find details about the process or flow object you are observing. This rich text area allows for the display of all additional details that has been uploaded regarding the item in particular. These details provide users with all critical information about items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

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

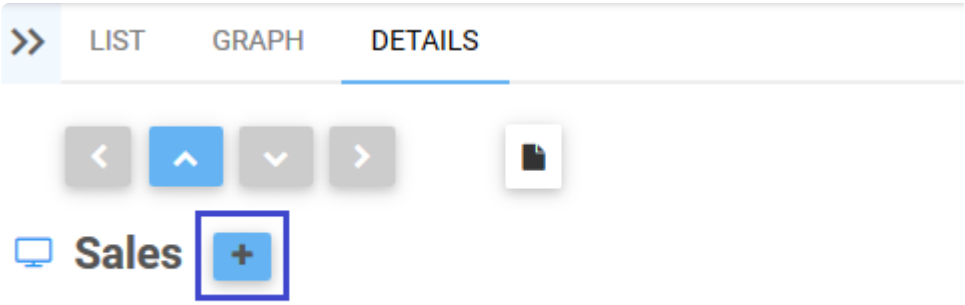


4.4.4.1 Navigation

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.



4.4.4.1.1 Toolbar

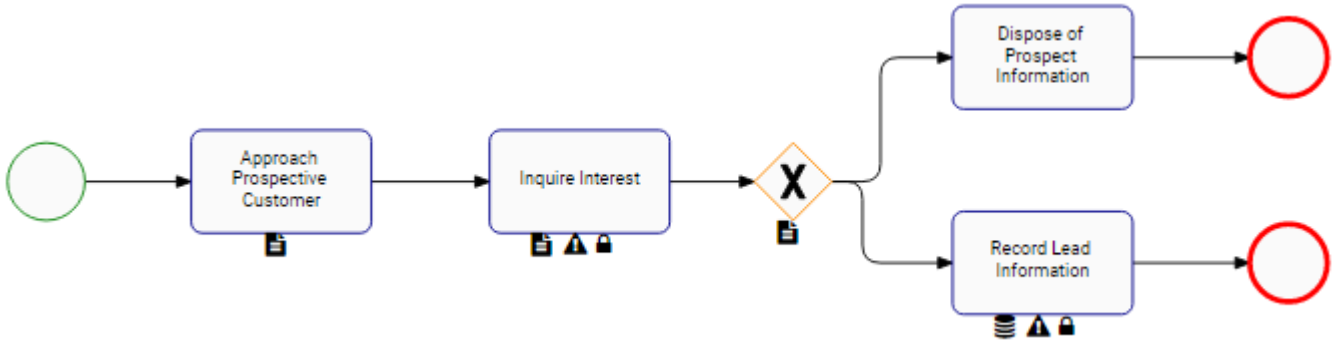
The toolbar provides users with a variety of functions to navigate and leverage the details page.

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.

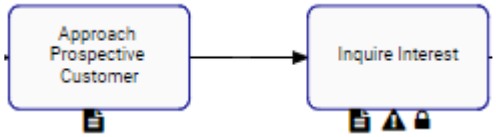


A user can navigate directly from the Details page of “Customer Approach” directly to “Interest Inquiry” and vice versa.

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

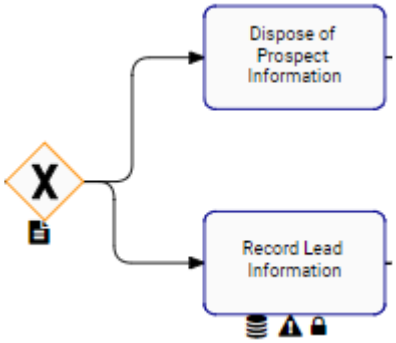
2. Click on a desired Task (e.g. Approach Prospective Customer)

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.



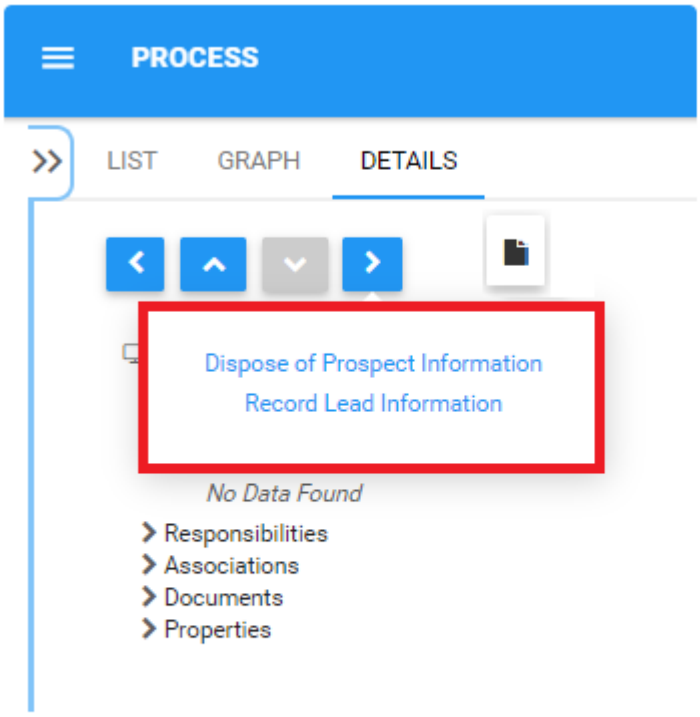
Please see the following instructions to use the Value-Stream Navigation arrows in a Multiple Navigation Paths:

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.

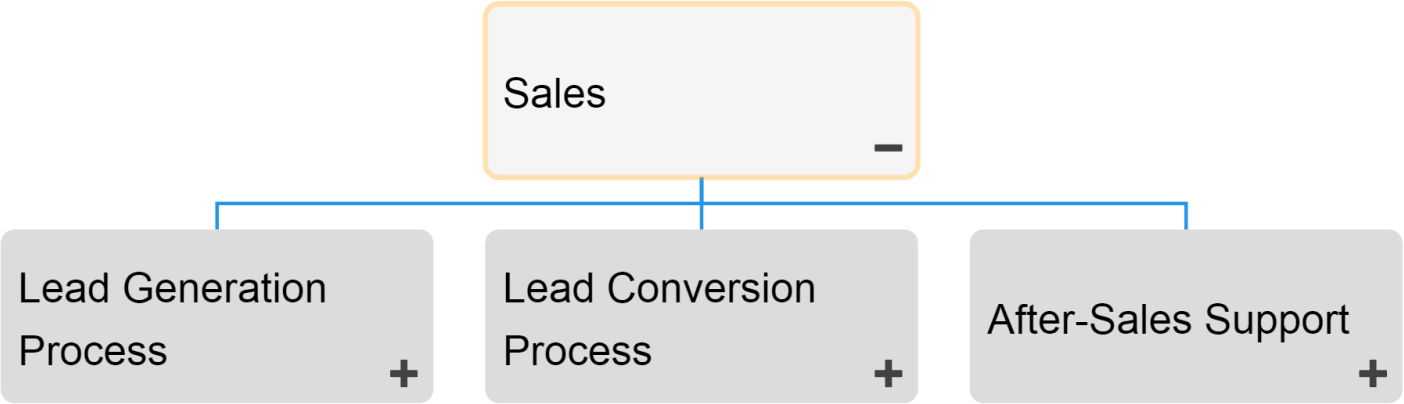
> The arrows will only be enabled if there is an additional item within the process to navigate to. If a user selects an item at the end of a process, then the user will not be able to further navigate right and will have the right arrow disabled.

4.4.4.1.1.2 Hierarchy Navigation

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

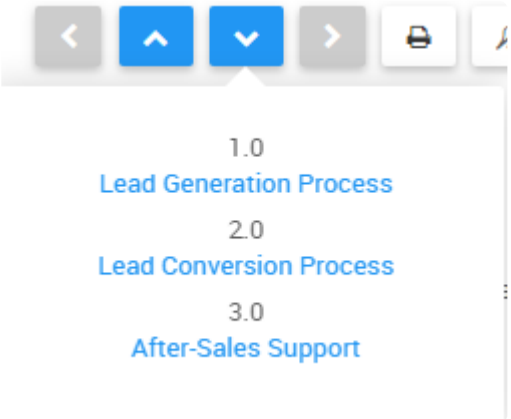
Using the and buttons, users can navigate from process sets to processes, processes to sub-processes, and so on. The hierarchy follows the format that can be viewed in the **Hierarchy Graph**.

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.

2.0 Lead Conversion Process

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

© 2020 Interfacing Technologies Corporation

4.4.4.1.1.4 Subscribe

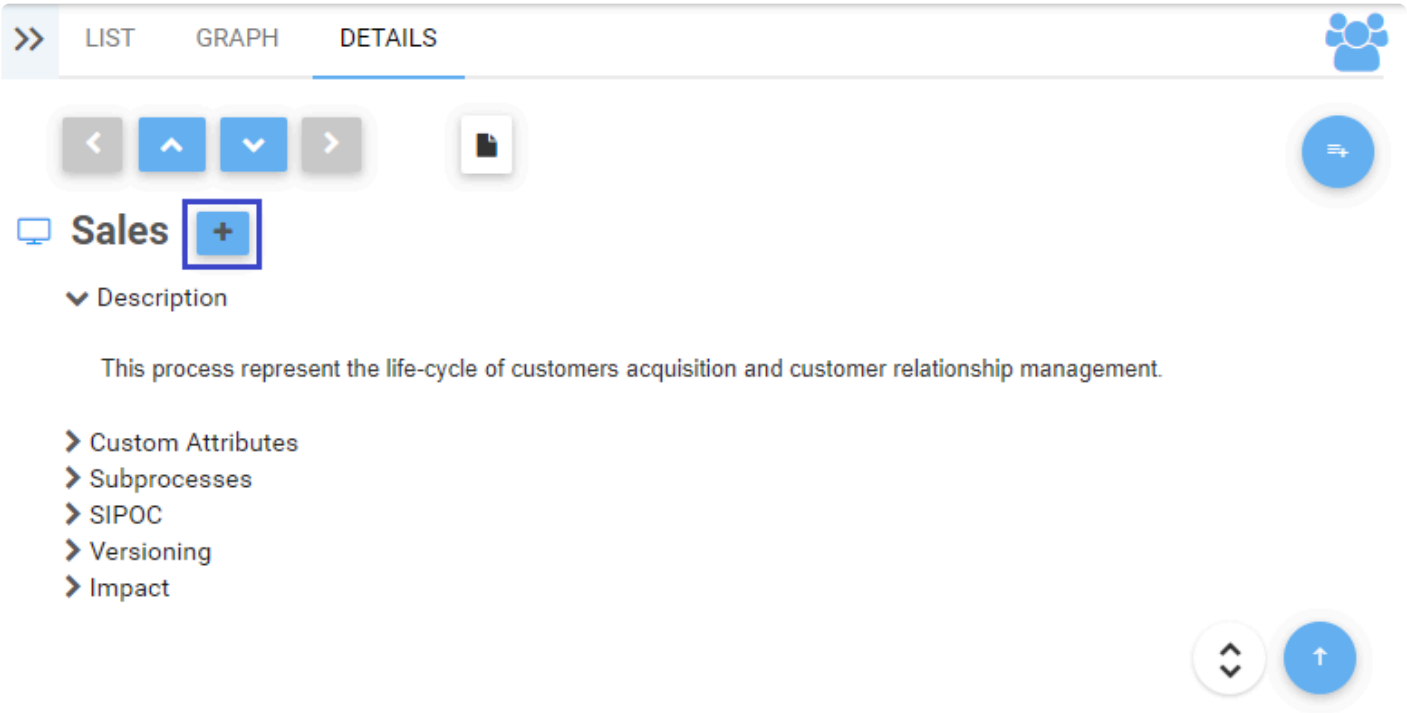
The subscribe function, symbolized by the icon, has been added to allow users to track items, objects and processes in the EPC. Users can subscribe to specific items or processes to simplify and centralize monitoring activities. By subscribing to items, users will receive notifications when items or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

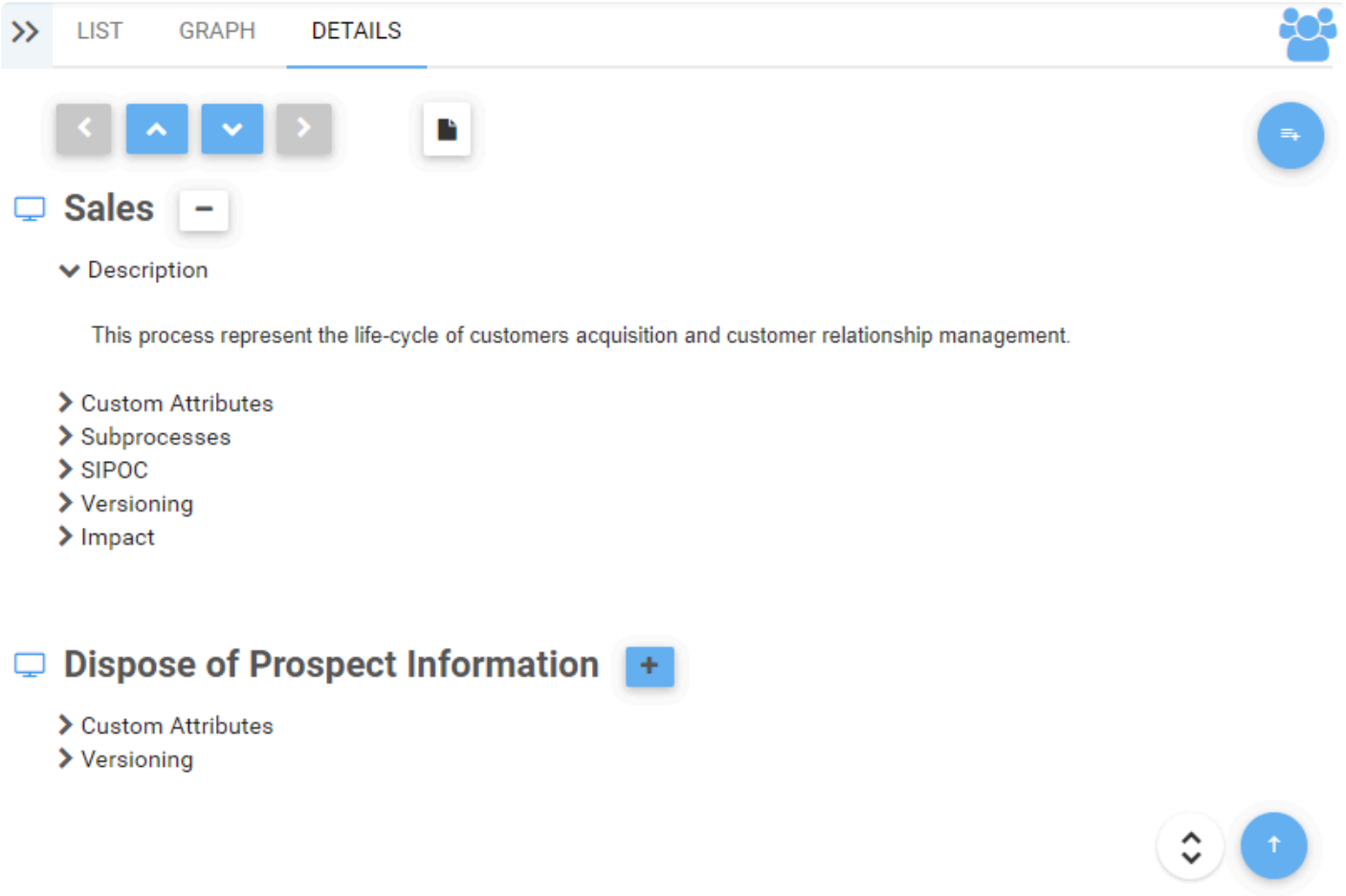
4.4.4.1.2 Details Drilldown

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:



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

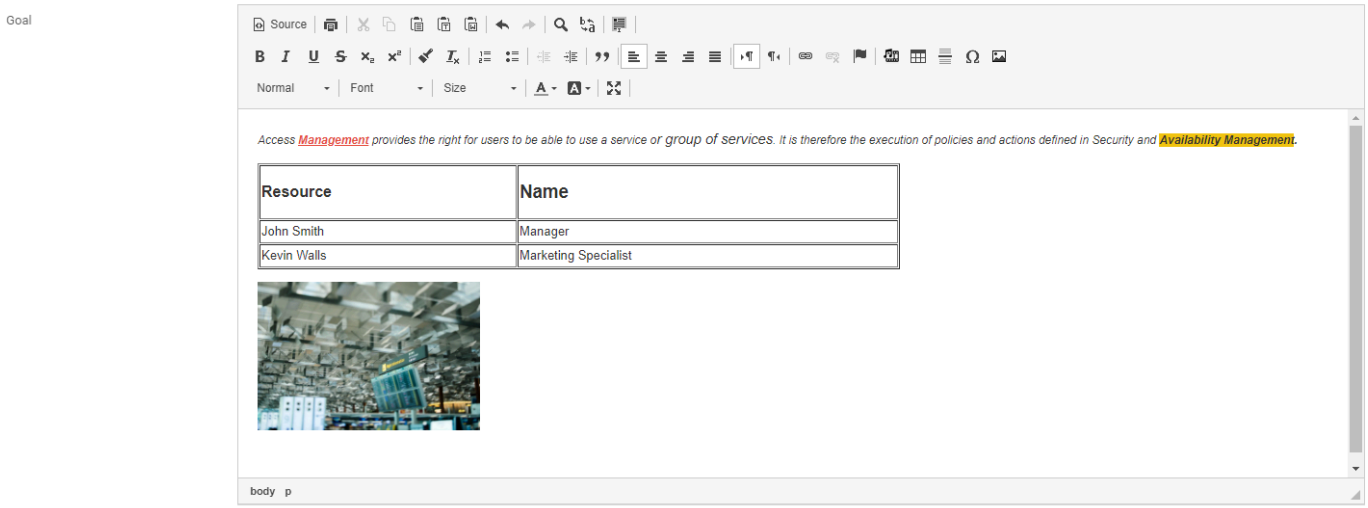
The description section provides users with all details relating to what a process is, as well as particular information that can assist with process execution. This information, populated by EPC Modelers, will provide further details for users to.

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.

This field of text allows for additional formatting such as:

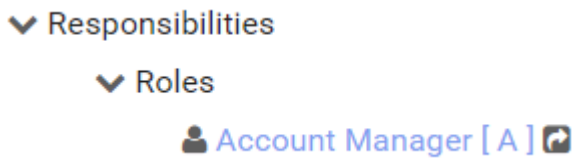
- font sizes
- font style (e.g., bold, italic)
- colors
- tables
- images



4.4.4.2.3 Responsibilities Preview

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

To navigate directly to the object, click on the icon.



Users can click on the specific item's name. You will be able to see the object's details in a popup. To navigate to the object's page, click on **Go to Object**

4.4.4.2.4 Association Sections

The association sections 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 to the process.

The **Documents** section will include all the documents associated to the process.

The **Rules, Regulations & Policies** section will include all the rules associated to the process.

The **Risks & Controls** section will include all the risk & controls associated to the process.

The **Strategy & Performance** section will include all the objective, KCI, KPI & KRI associated to the process.

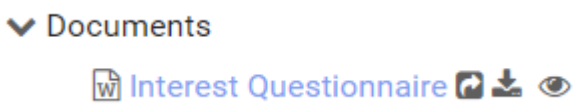
The **Master Data** section will include all the attributes & entities associated to the process.

© 2020 Interfacing Technologies Corporation

4.4.4.2.5 Documents

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

To navigate directly to the object, click on the icon.



Users can preview or download the document.

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

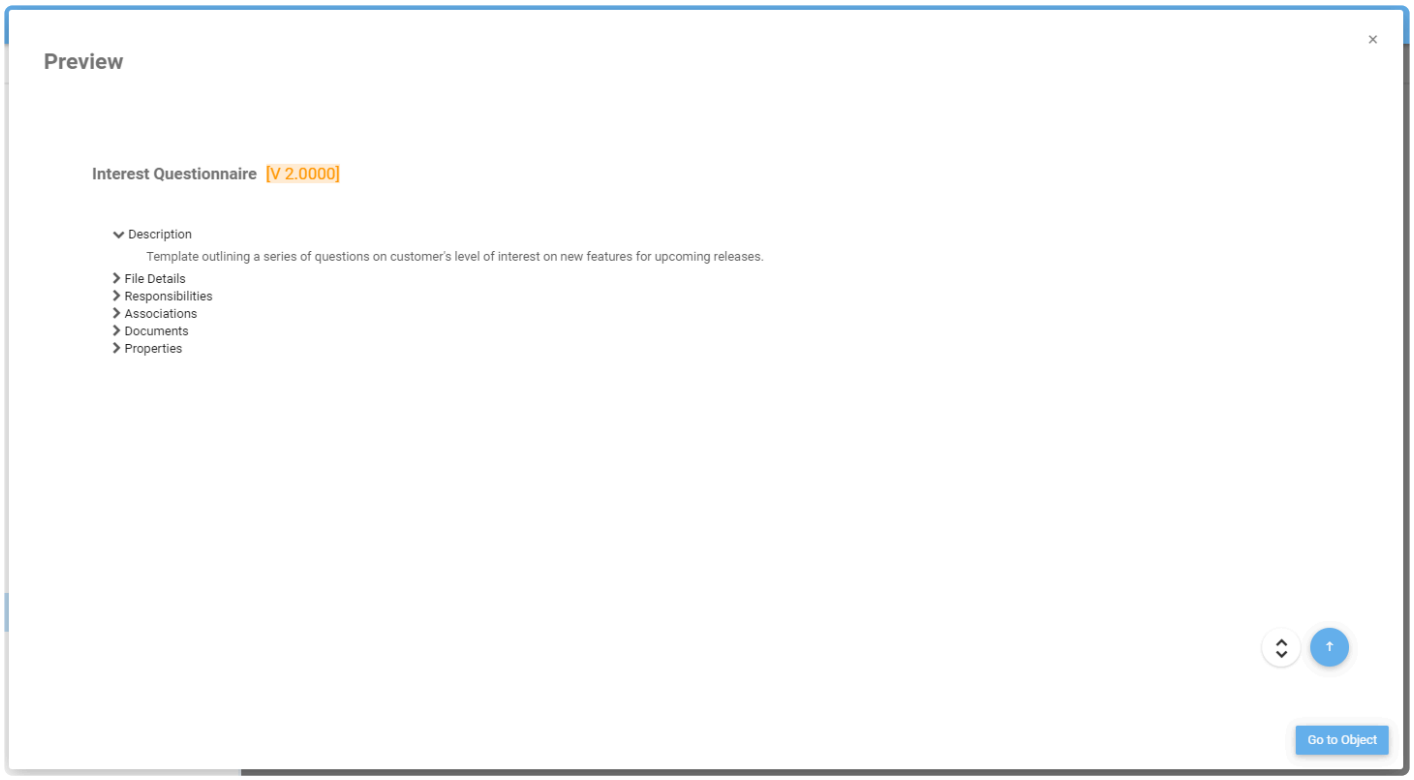
Documents Available for Preview:

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 **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.

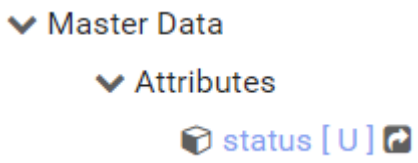
Users can click on the specific item's name. You will be able to see the object's details in a popup. To navigate to the object's page, click on **Go to Object**



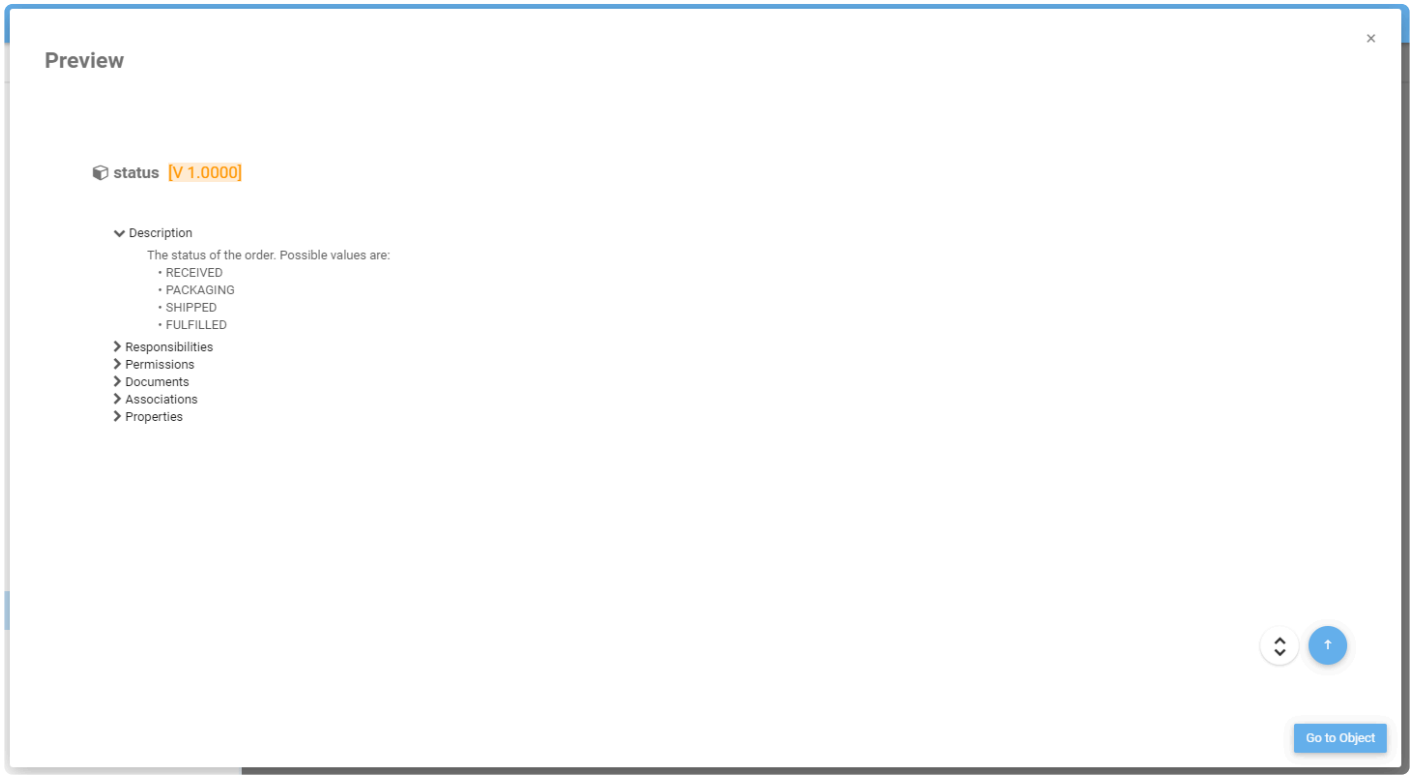
4.4.4.2.6 Master Data

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).

To navigate directly to the object, click on the icon.



Users can click on the object's name to view its details in a popup. To go to the object's page, click on **Go to Object**



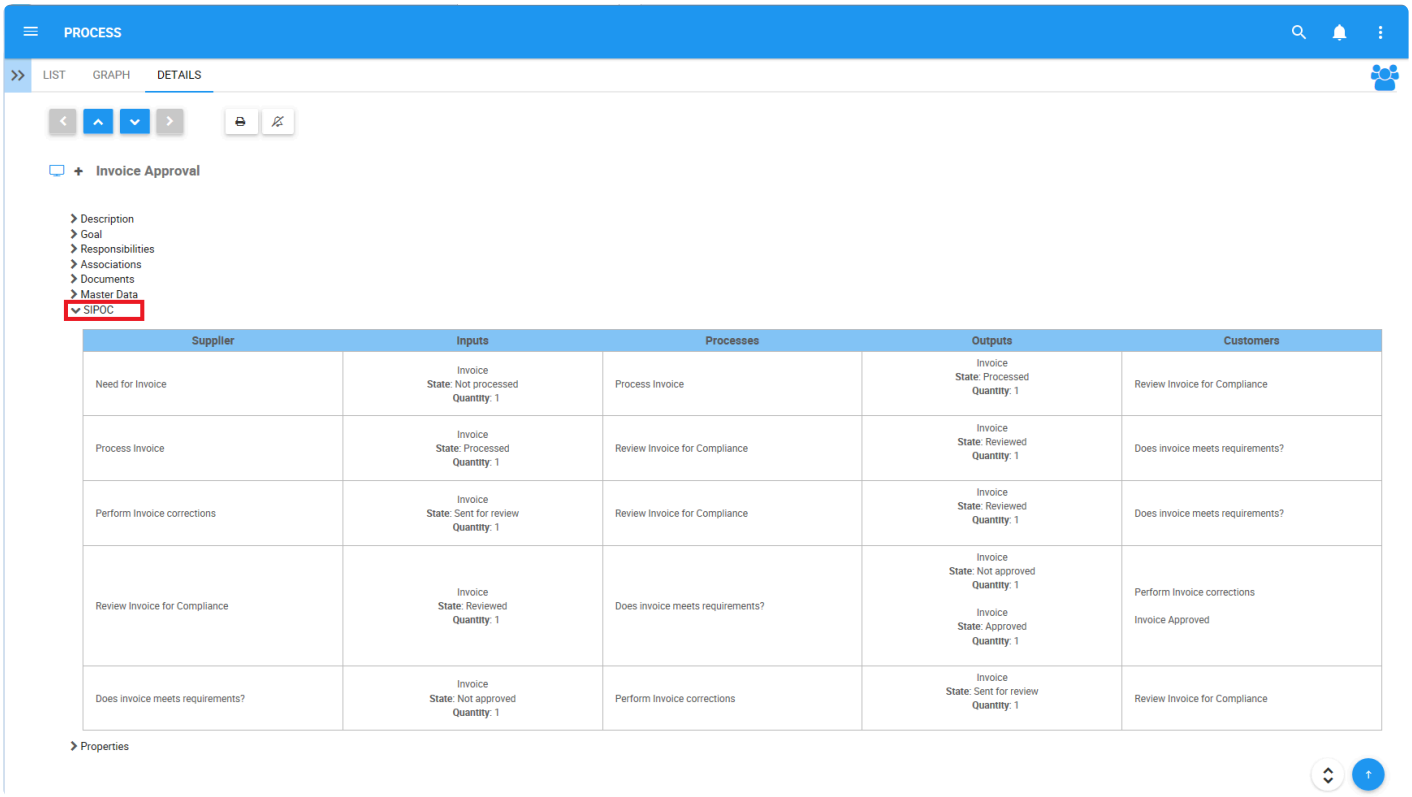
4.4.4.2.7 SIPOC

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.

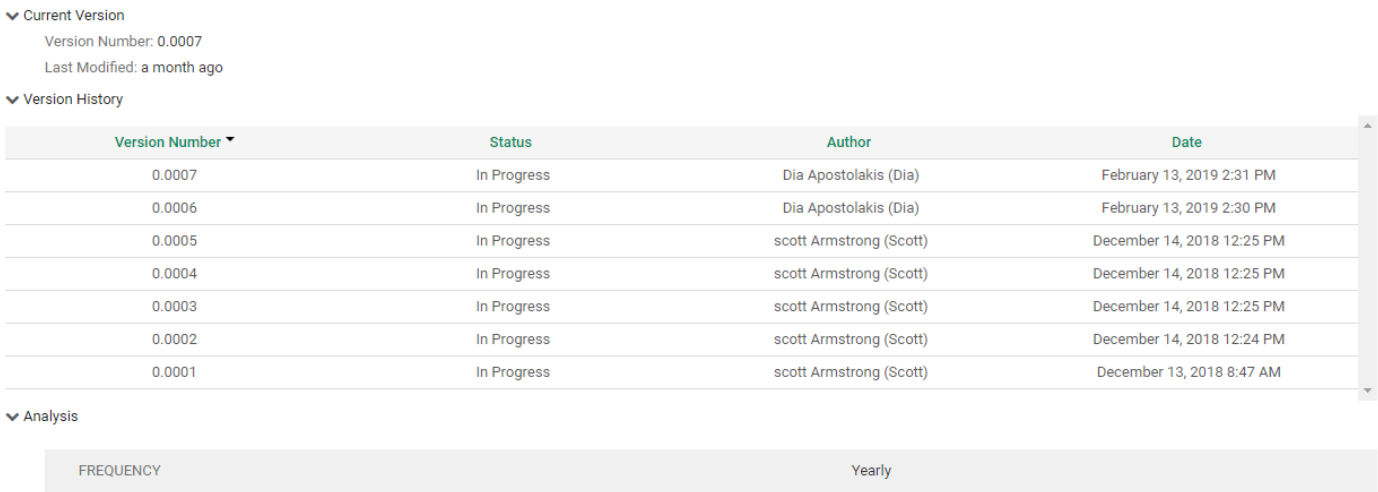
Supplier	Users can view the entity that provides input(s) to a process
Inputs	Users can view all that is used to produce one or more outputs from a process
Processes	Users can view the steps or activities carried out to convert inputs to one or more outputs
Outputs	Users can view the outputs emerging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



4.4.4.2.8 Versioning

The **Versioning** section provides users with additional key information about items. The section is broken down into 3 categories:

1.**Current Version**: Provides information about what version is being viewed, and when the latest modification has been made
2.**Version History**: Provides information on previous versions of the process. Includes major and minor versions, status, published comment, author and date.
3.**Analysis**: Provides information that better allows users to analyze items and related key details. The analysis items are Cost, Delay and Duration.



4.4.4.2.9 Summary

The EPC has integrated a Summary section within its Process Details pages, helping users summarize key information easily and concisely. Through the details page, users can summarize information that has been associated to processes and their flow objects. Summarizing the information allows users to quickly and easily see information that has been associated to the process and its flow objects.

Users can view the following information under the **Summary** sections after clicking on the **"+"** button:

1) Responsibilities : Provides you with a RASCI-VS Matrix featuring all responsibilities on the process

Summary

Responsibilities

	Roles			Assets
	Sales Manager	Customer	Sales Representative	Salesforce
Sales	A			
Customer Contacts Sales		R		
Identify Customer Needs	A		R	Su
New customer?			R	
Create Customer Profile			R, A	Su
Create Sales Order			R	Su
Send Sales Order			R	Su

Documents

Risks

2) Documents : Provides a table of all documents associated to the process

Summary
- Responsibilities
- Documents

Process Documents

Name	Type	Document
02.01.03 Production	Process	Prices - Wood Types

Flow Object Documents

Name	Type	Document
02.01.03.2 Production Preparation	Sub Process	Workplace Inspection Checklist
02.01.03.3 Inspect Production Area	Shortcut	Workplace Inspection Checklist
02.01.03.6 Measure & Pattern Material	Task	birdhouse pattern
02.01.03.7 Cut Material	Task	Final Touch Manufacturing - Pirch Insertion for Birdhouses
02.01.03.9 Attached Pieces (welding)	Task	Welding Health and Safety
02.01.03.9 Attached Pieces (welding)	Task	Welding Instructions
02.01.03.11 Inspect Assembly	Shortcut	EASHW - Hazard Identification Checklist
02.01.03.13 Sand Birdhouse	Task	Additional Sanding Instructions
02.01.03.15 Paint Birdhouse	Task	Spray Painting

- Risks

3) Risks : Provides a table of all risks associated to the process

Summary
- Responsibilities
- Documents
- Risks

Process Risks

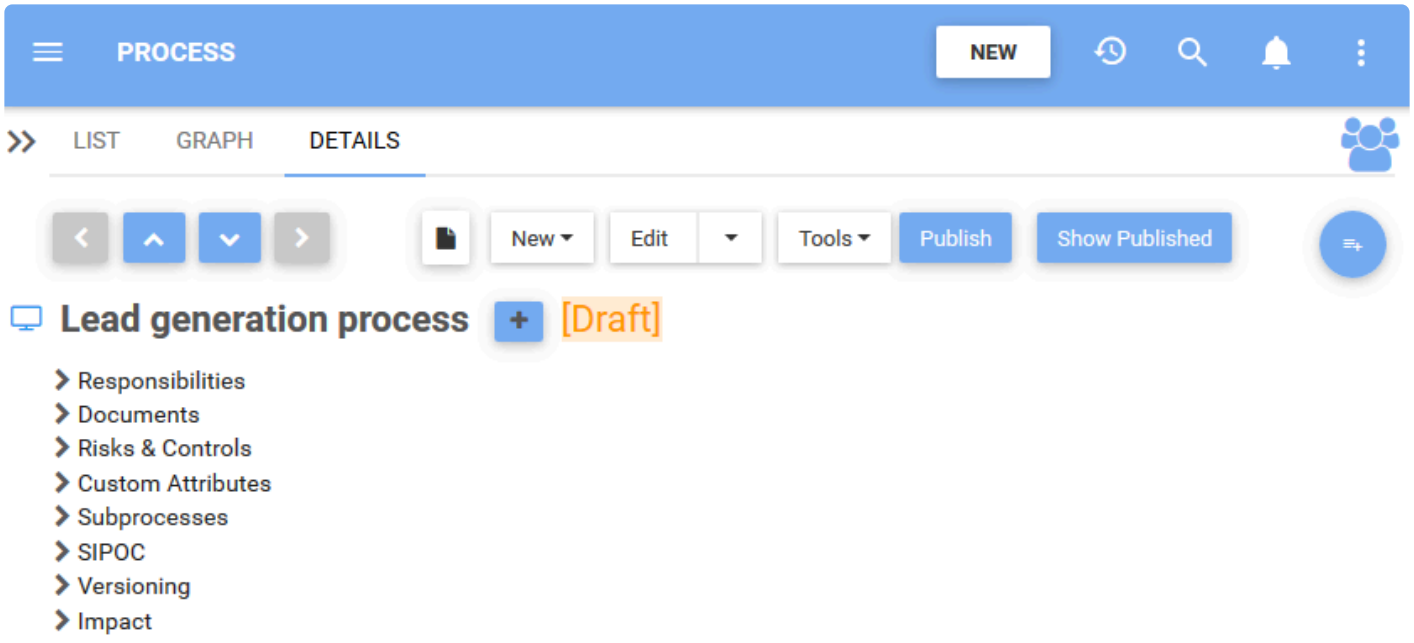
Name	Type	Risk
02.01.03 Production	Process	Fire Hazards

Flow Object Risks

Name	Type	Risk
02.01.03.3 Inspect Production Area	Shortcut	Improperly trained employees
02.01.03.3 Inspect Production Area	Shortcut	Paint spill
02.01.03.7 Cut Material	Task	Wood Working Machine Danger
02.01.03.9 Attached Pieces (welding)	Task	Equipment malfunction
02.01.03.11 Inspect Assembly	Shortcut	Annual climate variations
02.01.03.15 Paint Birdhouse	Task	Paint fumes
02.01.03.15 Paint Birdhouse	Task	Paint spill
02.01.03.16 Paint Doghouse	Task	Paint fumes
02.01.03.16 Paint Doghouse	Task	Paint spill

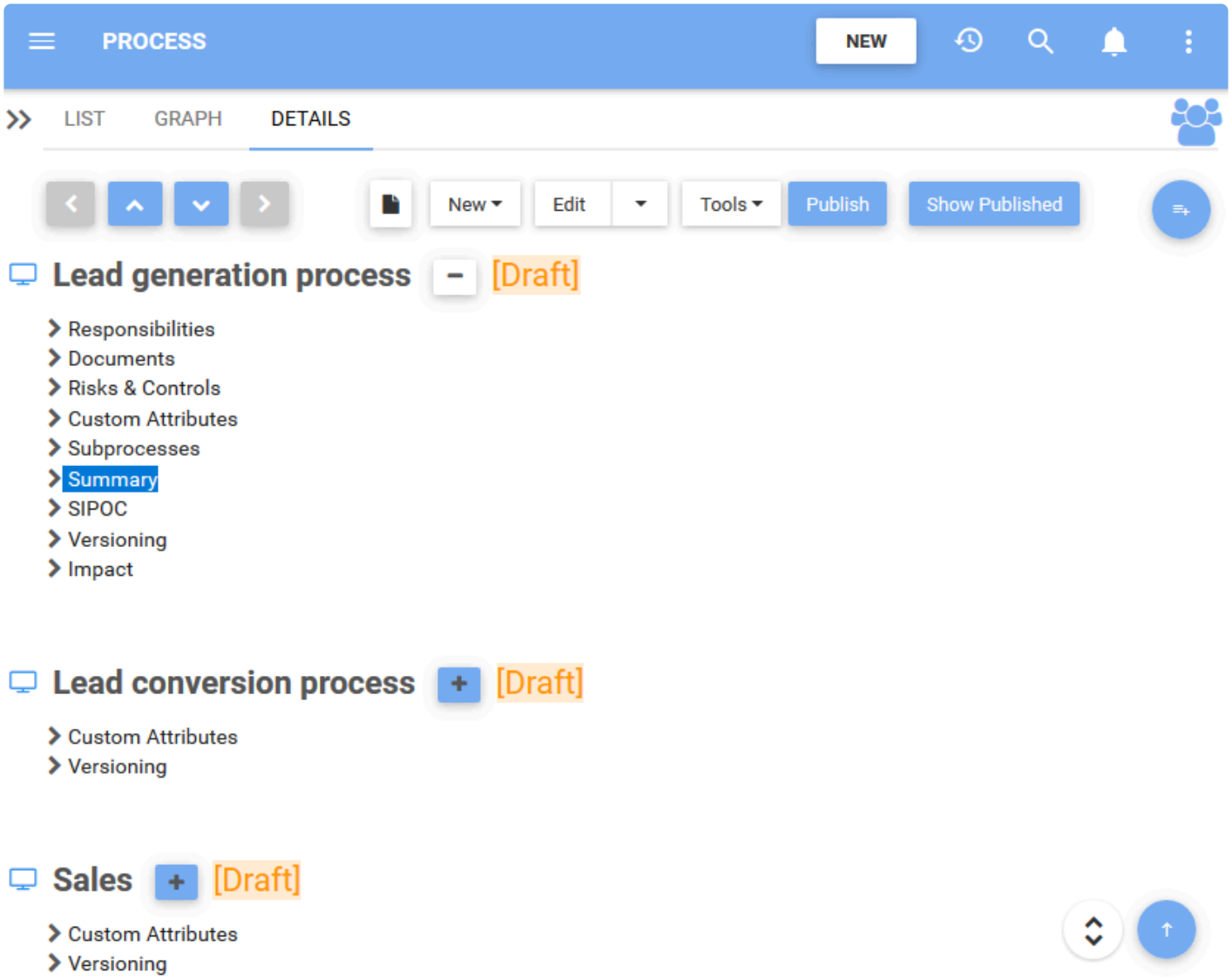
To access the Summary sections:

1) Navigate to the details page of the process you wish to view



2) Click on the **+** on the right of the process name

3) Click on the **Summary** section


PROCESS
NEW
LIST
GRAPH
DETAILS
New
Edit
Tools
Publish
Show Published
Lead generation process
[Draft]
Responsibilities
Documents
Risks & Controls
Custom Attributes
Subprocesses
Summary
SIPOC
Versioning
Impact
Lead conversion process
[Draft]
Custom Attributes
Versioning
Sales
[Draft]
Custom Attributes
Versioning

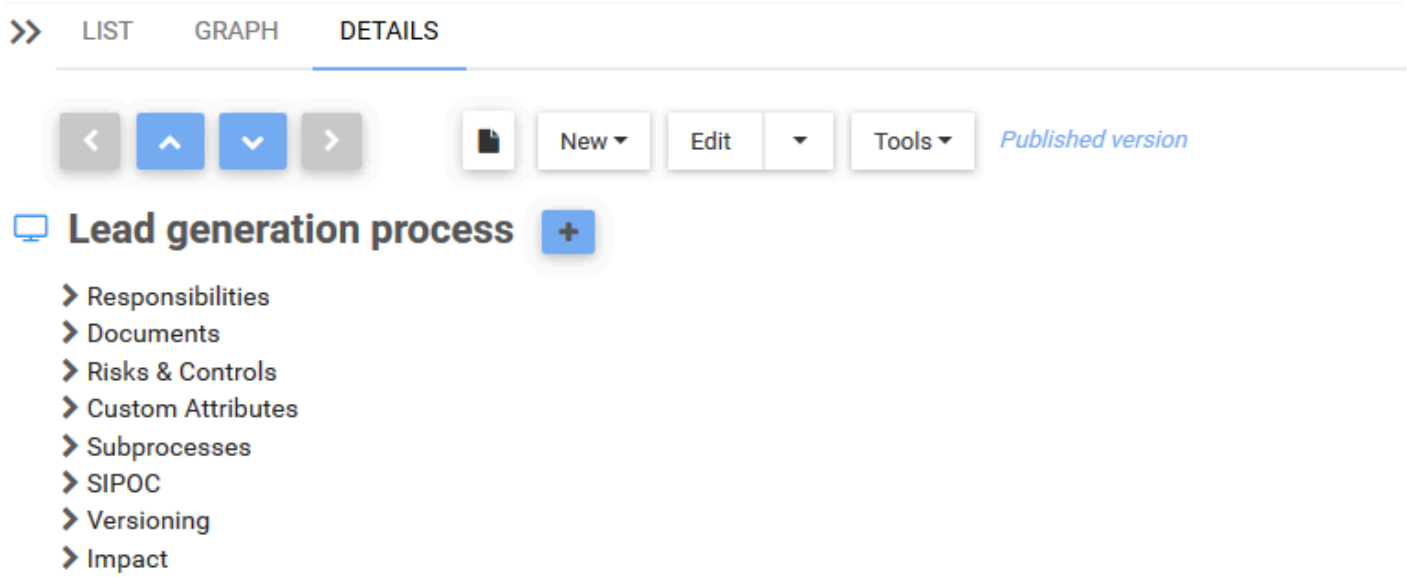
4.4.4.2.9.1 Responsibilities Summary

The Responsibilities Summary provides users with a RASCI-VS Matrix, allowing users to see all the associated parties in a given process. This table summarizes all the RASCI-VS Assignments made on a process and its flow objects and can include:

1. Associated Roles
2. Associated Resources
3. Associated Assets
4. Associated Org Units

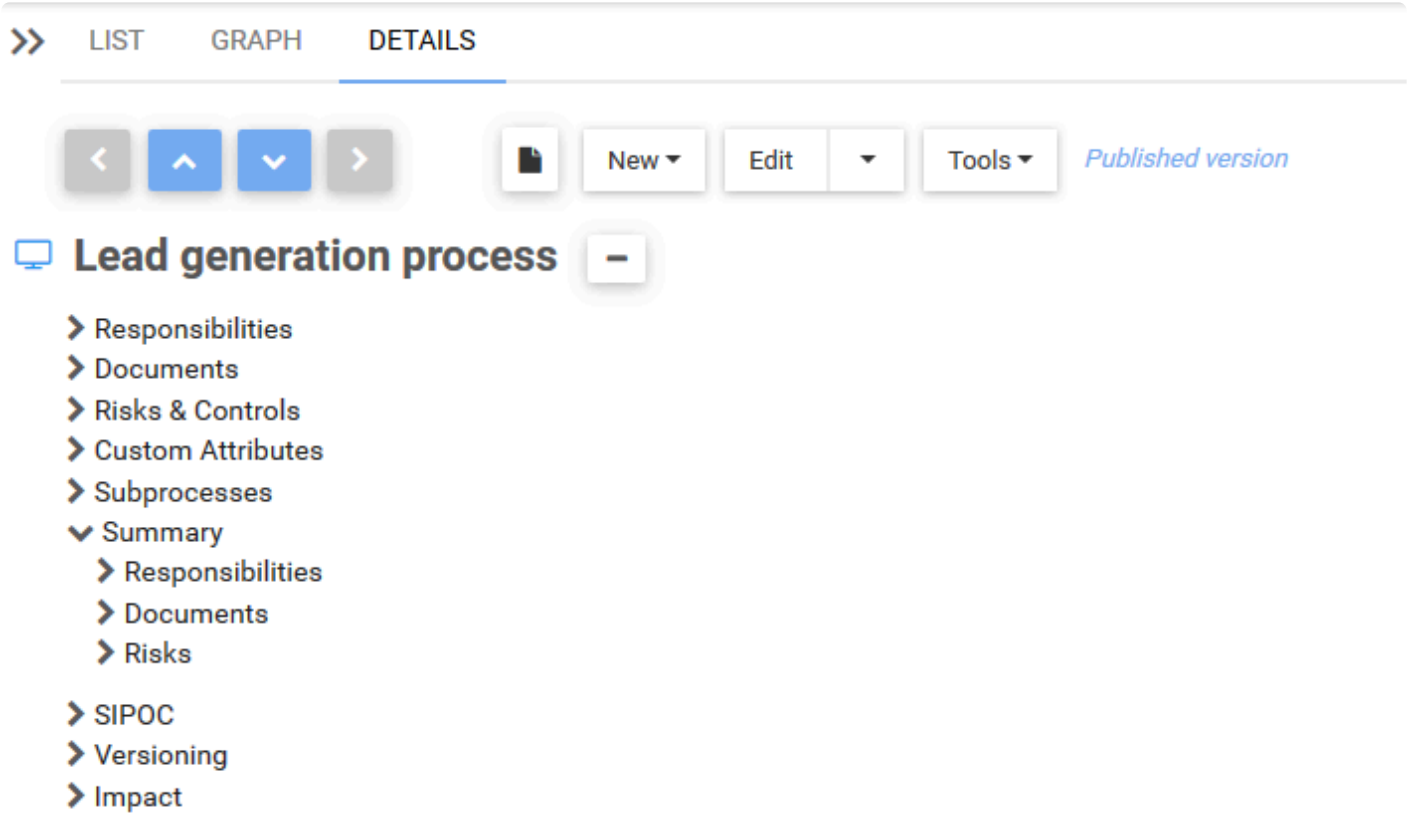
To access the Responsibilities Summary sections:

1) Navigate to the details page of the process you wish to view



2) Click on the **+** on the left of the process name

3) Click on the **Summary** section



4) Click on the **Responsibilities** section under Summary

Summary

Responsibilities

	Roles			Assets
	Sales Manager	Customer	Sales Representative	Salesforce
Sales	A			
Customer Contacts Sales		R		
Identify Customer Needs	A		R	Su
New customer?			R	
Create Customer Profile			R, A	Su
Create Sales Order			R	Su
Send Sales Order			R	Su

Documents

Risks

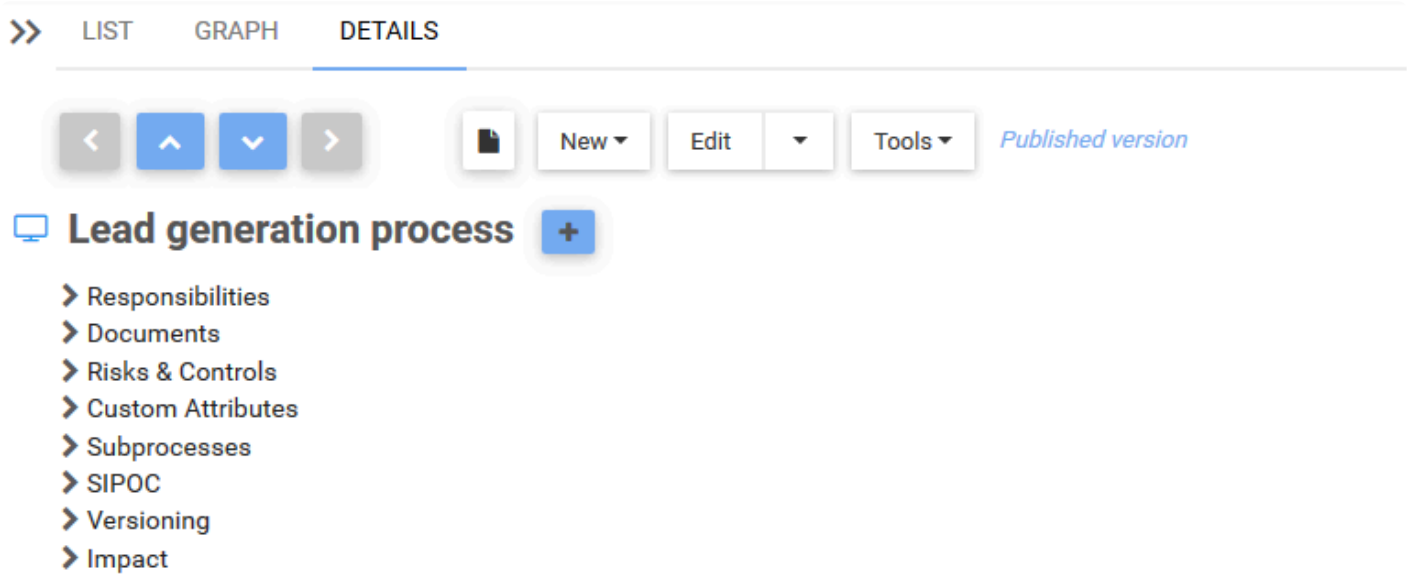
4.4.4.2.9.2 Documents Summary

The Documents Summary provides users with a list of all documents used in a process, allowing users to see all the associated documentation for a process. This table summarizes all the Document associations made on a process and its flow objects and can include:

1. Documents associated with the Process
2. Documents associated with the flow objects of the process

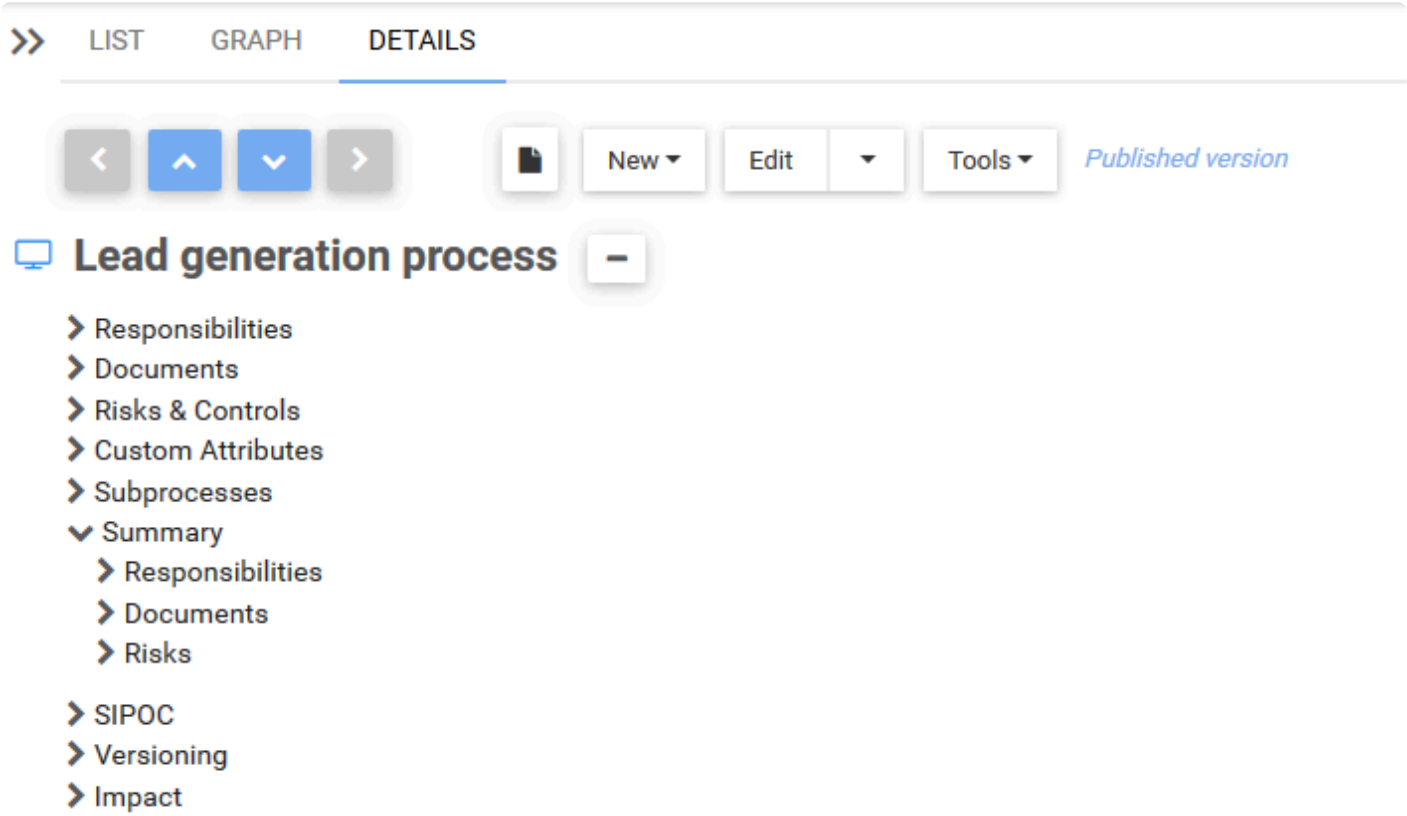
To access the Documents Summary sections:

1) Navigate to the details page of the process you wish to view

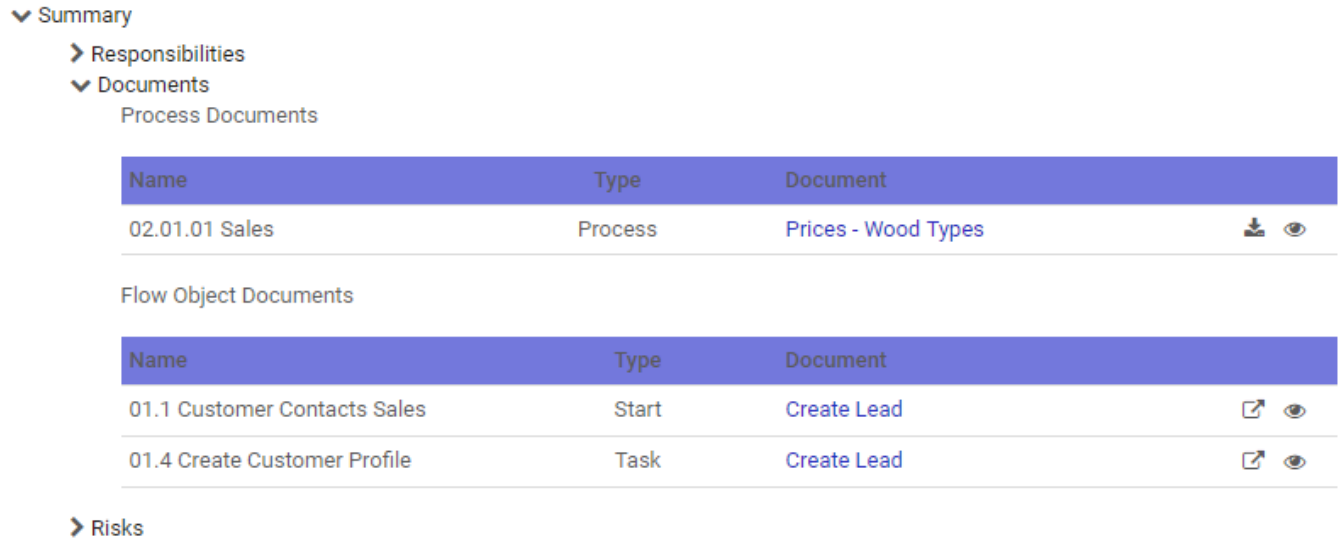


2) Click on the **+** on the right of the process name

3) Click on the **Summary** section



4) Click on the **Documents** section under Summary



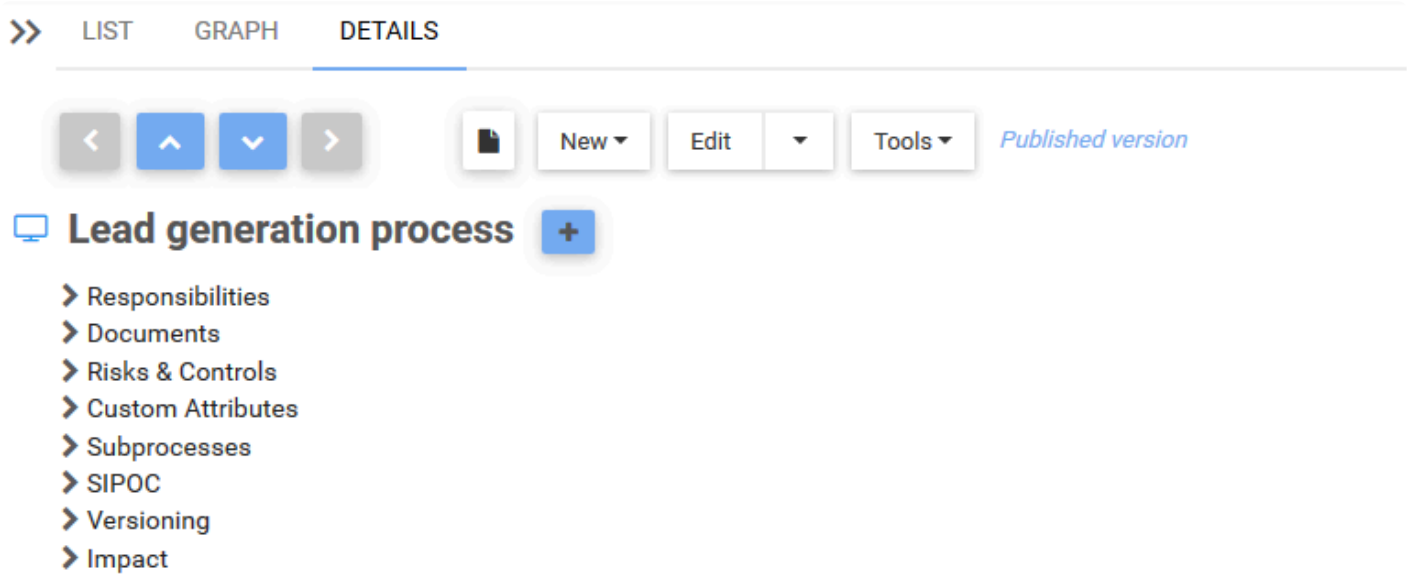
4.4.4.2.9.3 Risks Summary

The Risks Summary provides users with a list of all risks impacting a process, allowing users to see all the associated risks for a process. This table summarizes all the Risk associations made on a process and its flow objects and can include:

1. Risks associated with the Process
2. Risks associated with the flow objects of the process

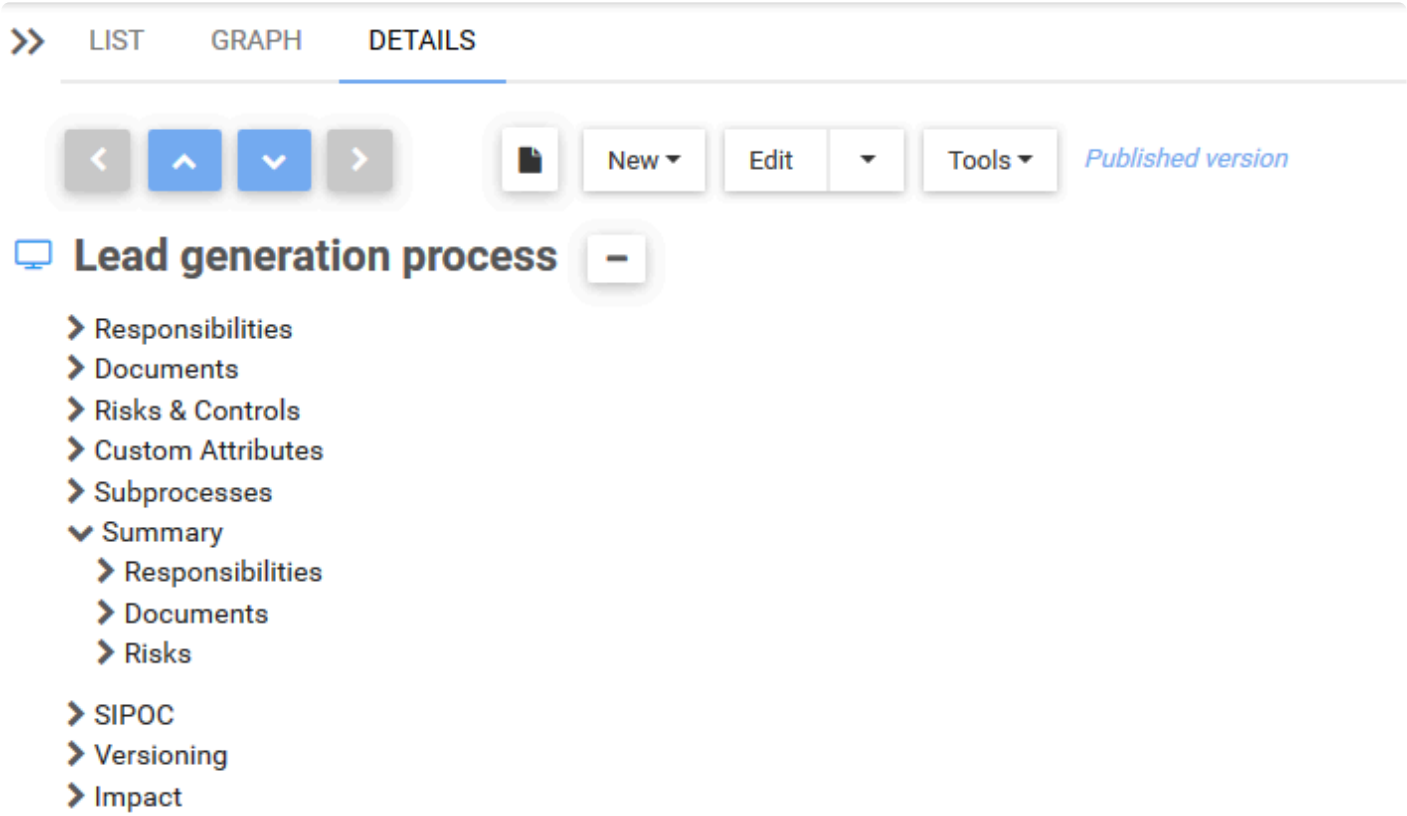
To access the Risks Summary sections:

1) Navigate to the details page of the process you wish to view

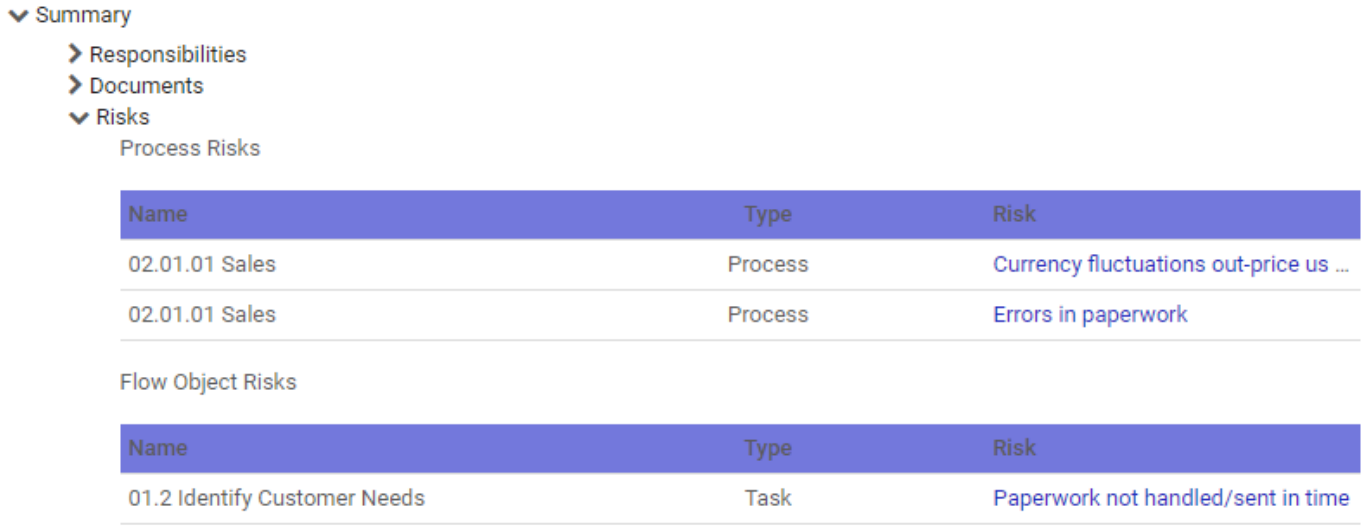


2) Click on the **+** on the right of the process name

3) Click on the **Summary** section



4) Click on the **Risks** section under Summary



4.4.4.2.10 Impacts

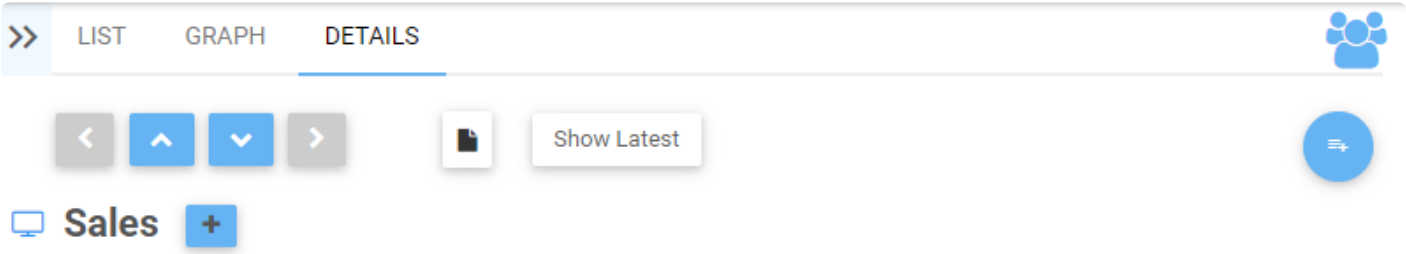
Users are able to view the impacts an object has on others in a list form in the Details view of any object. It is a complement to the Impact Graph, and another way of visualizing impact data.

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 to the object. Impacts 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.

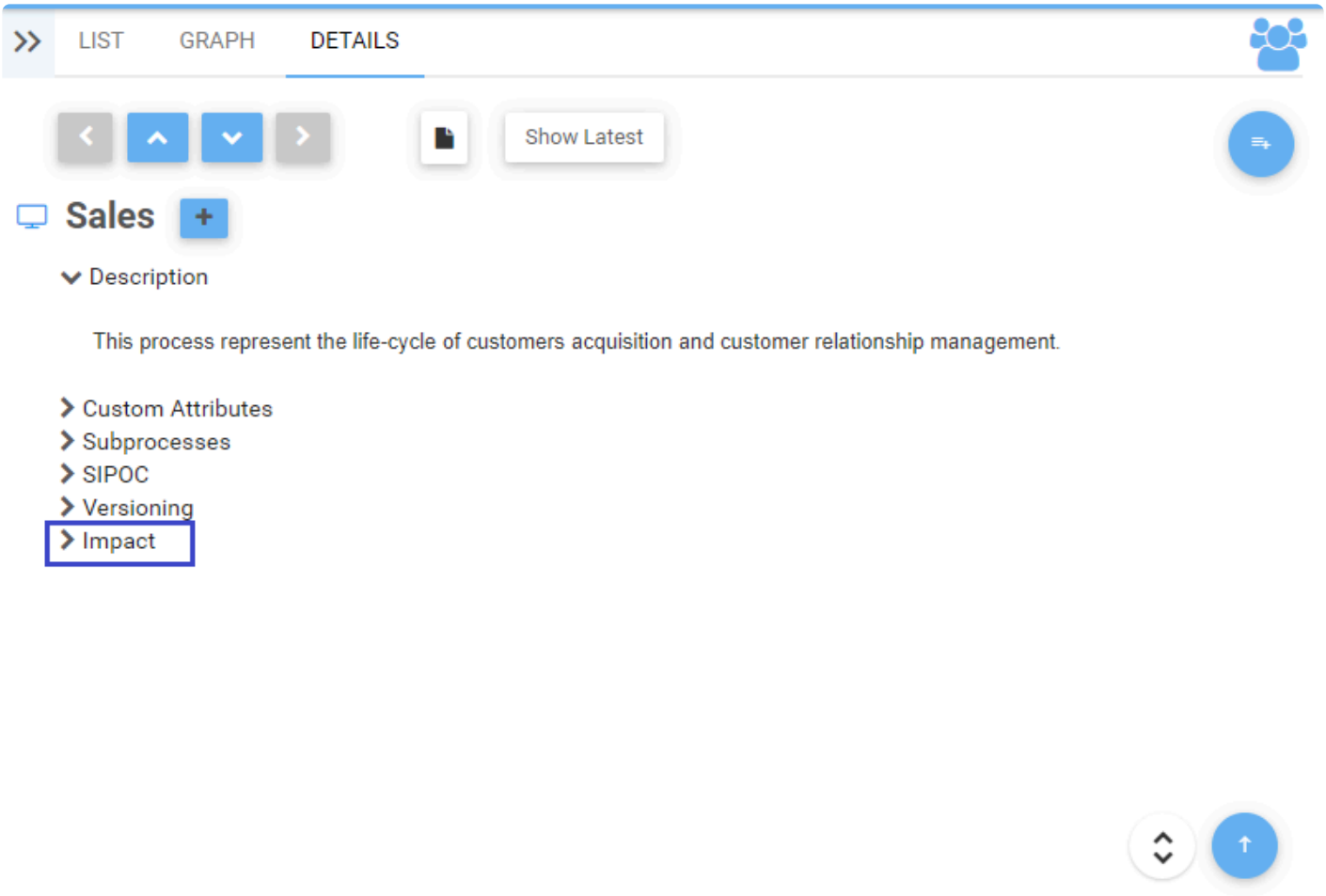
> The impact list will only show **direct** impacts, as opposed to the impact graph, which can be expanded to show **indirect** impacts on an object

Navigating to the Impact List

1. Navigate to any Detail page of any object in EPC



2. At the bottom of the Details page, click on Impact to expand the section



3. All direct impacts associated to the EPC Object will be listed.

> To sort a column by alphabetical order, click on it's header. The arrow pointing up indicates sorting in **Ascending Order**, the arrow pointing down indicates sorting in **Descending Order**, and no arrow indicates **No Sorting**.

Object Name A	Parent B	Object Type C	Assignment Type D	Justification E	Impact Type F	Status G
[Default Template] Analysis (A4 - Lands...	Default template folder	Document	Directly Impacts		Association	Published
Document should be reviewed every yea...	Import Folder	Rule	Directly Impacts		Association	Published
Enforce a zero-tolerance policy for dang...	Import Folder	Control	Directly Impacts		Association	Published
Onboarding cost	Imported Objective	KPI	Directly Impacts		Association	Published
Ratio of candidates to hires	Imported Objective	KPI	Directly Impacts		Association	Published
Risk B - with risk analysis!	Import Folder	Risk	Directly Impacts		Association	Published
Warehouse	Imported Measure Set	Objective	Directly Impacts		Association	Published

A	Object Name	The Name of the object. Click on the hyperlink to go to the object
B	Parent	The Parent of the object
C	Object Type	The type of the object

D	Assignment Type	The relationship type between the two objects
E	Justification	The justification of the object
F	Impact Type	How does this object impact the current object
G	Status	The status of the object (In Progress or Published)

! NOTE: If you expand a process in order to see its sub-items (the “+” sign located to the left of the name of the process), the impact list will NOT be available for sub-items. to view the impact of the sub-item, you must directly navigate to the sub-item.

Suggested Impacts

Users are able to view the suggested impacts an object in a list form in the Details view. They are presented in descending order of confidence level starting from the most possibly impacting object to the 10th least.

Object Name A	Parent B	Object Type C	Status D	Confidence Level % E
Participants Background	VBM	Process	In Progress	50 - 75
Obtain candidate background information	Manage applicant information	Process	Published	10 - 25
“Perform a background check	new folder	Control	Published	10 - 25
sop template no background image	0	Document	In Progress	10 - 25
Copy of test copy	Rosario	Process	In Progress	0 - 10
Copy of Goods	Copy of objective-01	Objective	In Progress	0 - 10
Copy of Copy of 11531-name4	VBM	Process	In Progress	0 - 10
Copy of Goods	Copy of objective-01	Objective	In Progress	0 - 10
Copy of Goods	Copy of objective-01	Objective	In Progress	0 - 10

A	Object Name	The Name of the object. Click on the hyperlink to go to the object
B	Parent	The Parent of the object
C	Object Type	The type of the object
D	Status	The status of the object (In Progress or Published)
E	Confidence Level	The confidence level the object has a possible impact

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

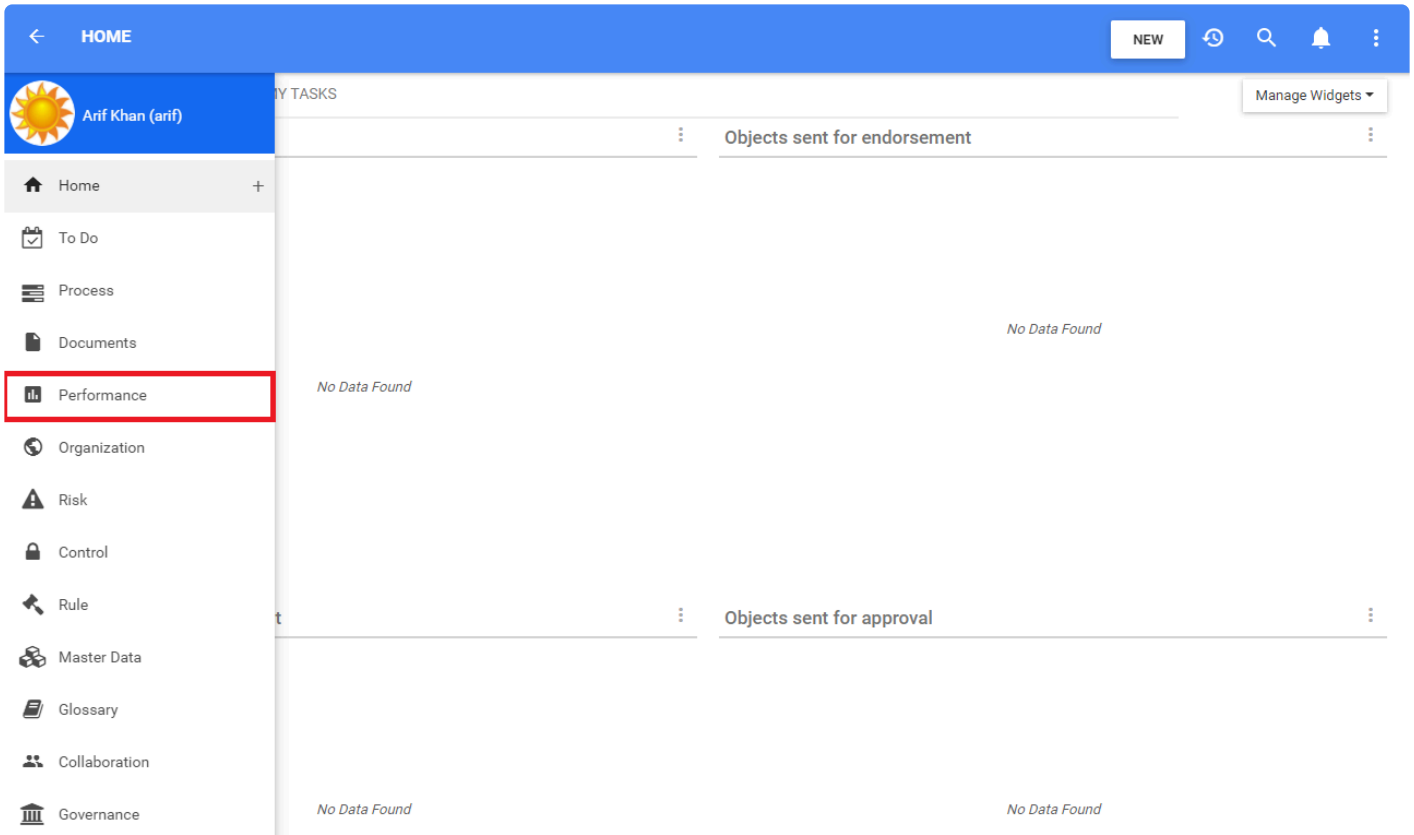
Performance viewing is a key function of the EPC and allows users to view personal, role and company performance measures. The EPC provides 3 different dimensions, allowing users to properly view and understand performance measures.

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. No hierarchy filter	A list view where **all** items within the given module are listed
2. Current level & below	A list view where **all levels below** the selected item are listed
3. Current level	A list view where **1-level level below** the selected item are listed

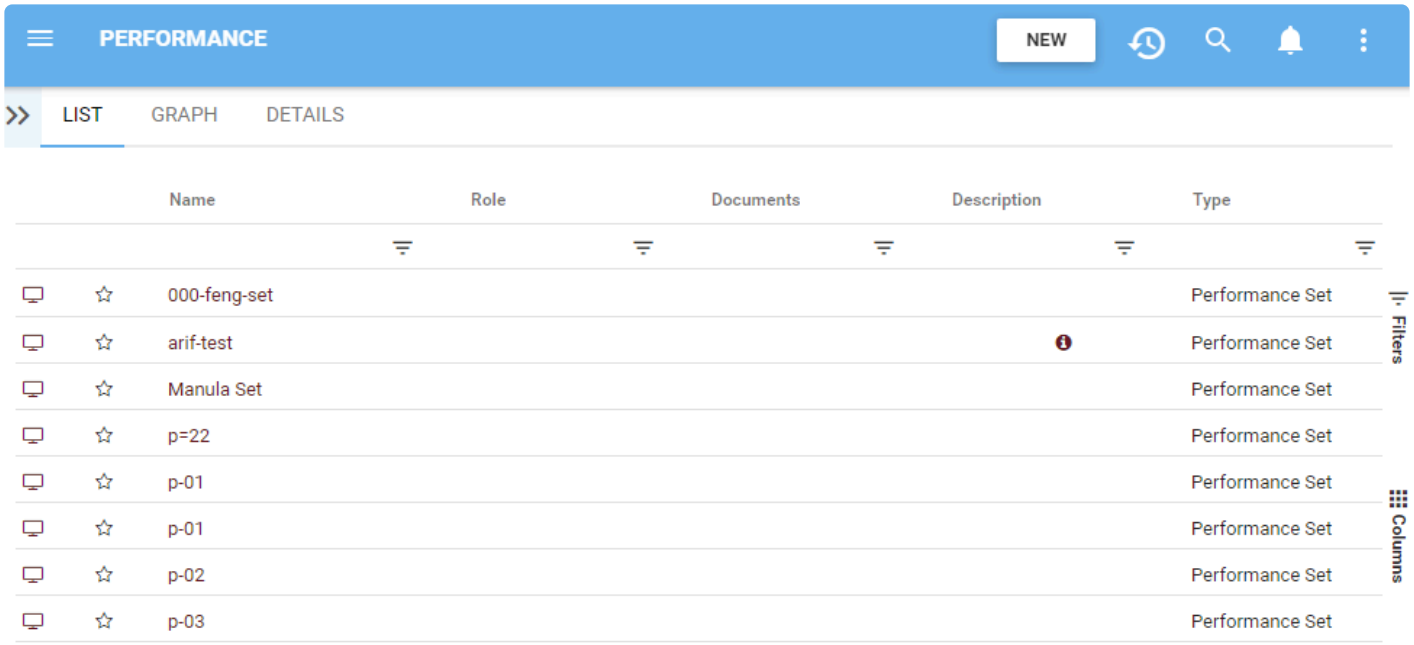
The selected list view will be saved both by web browser and by user.

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).

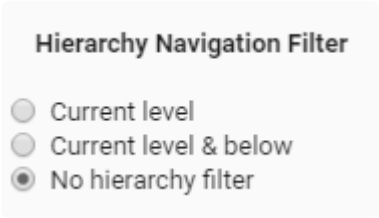


To simplify performance viewing; users **are not** greeted with all major performance measures and objectives that they are associated too. Users are greeted with the list of Measure Sets, the highest level of Performance Measure Classification in the EPC. However users can display these measures within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

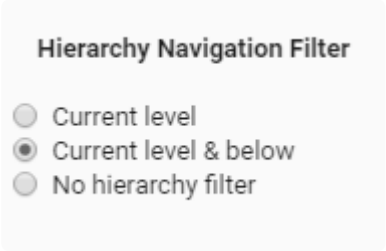
> These steps are only required if a user is using an account or browser for the first time. As noted above, list preferences will be saved by user and browser to simplify navigation.

4. **(Optional)** To view sub-processes, users must select the filter panel and then select “Current level & below of the EPC Web App.

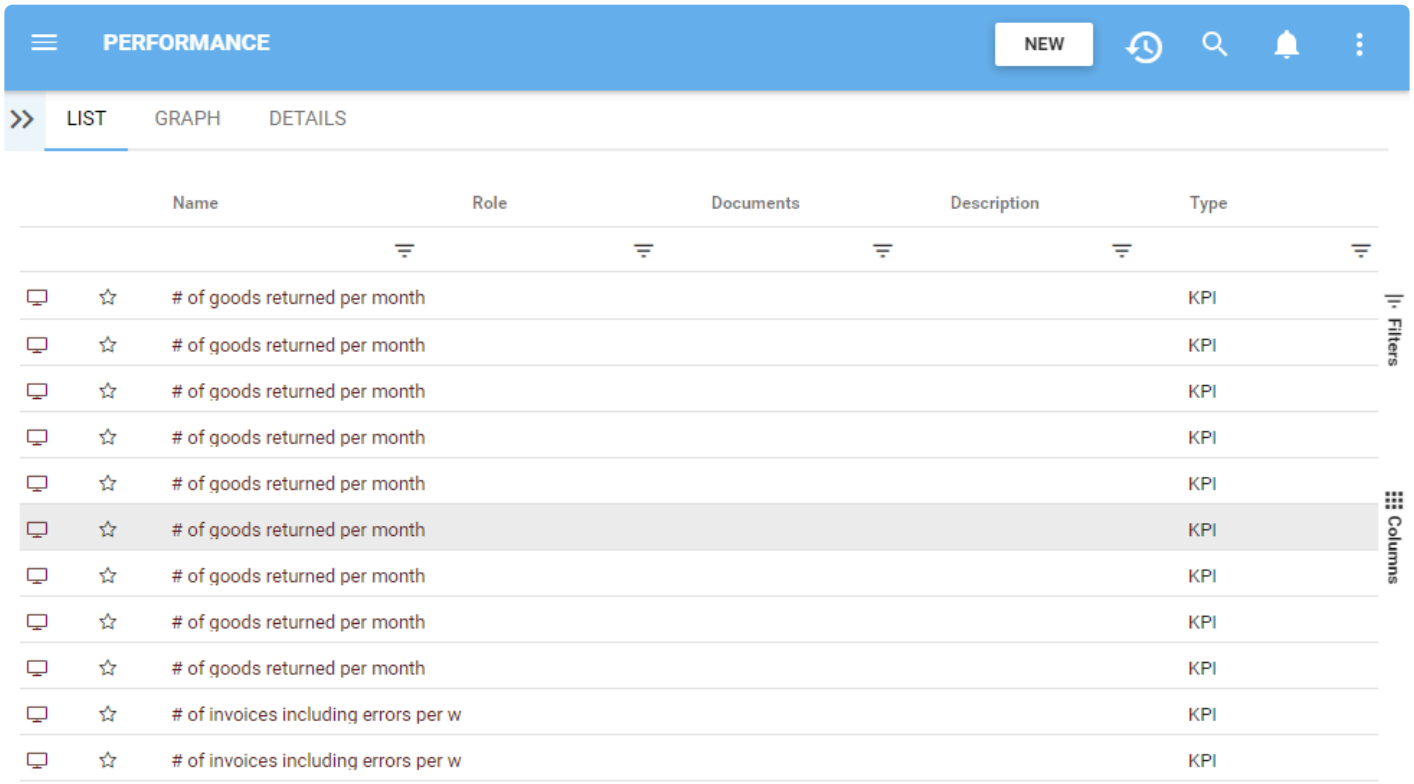
5. **(Optional)** Click on the filter setting and it will generate a list view



6. **(Optional)** Select “Current level & below”



7. **(Optional)** Upon selecting the “Current level & below”, the EPC will automatically refresh the page



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
Identifier	Textual search for any existing unique identifier of an object
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 ……
Control	Whether or not there are Controls directly associated with the item in question

Description	Whether or not there is a Description inputted for the item in question Shows…..
Type	The type of the item
Last Modified By	The name of the last resource that modified the object
Subtype	Whether or not if this object is classified as a business type
Categories	Whether or not there are Categories directly associated with the item in question
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)
Locked	Whether the item in question is currently locked or not

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

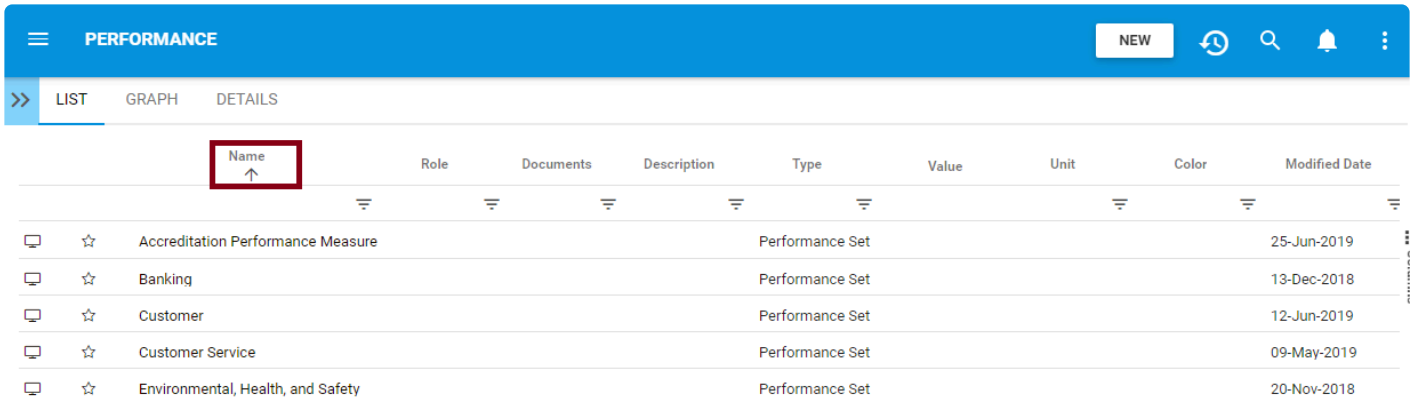
1. Navigate to the Performance Module

2. Navigate Cursor to desired **Category**

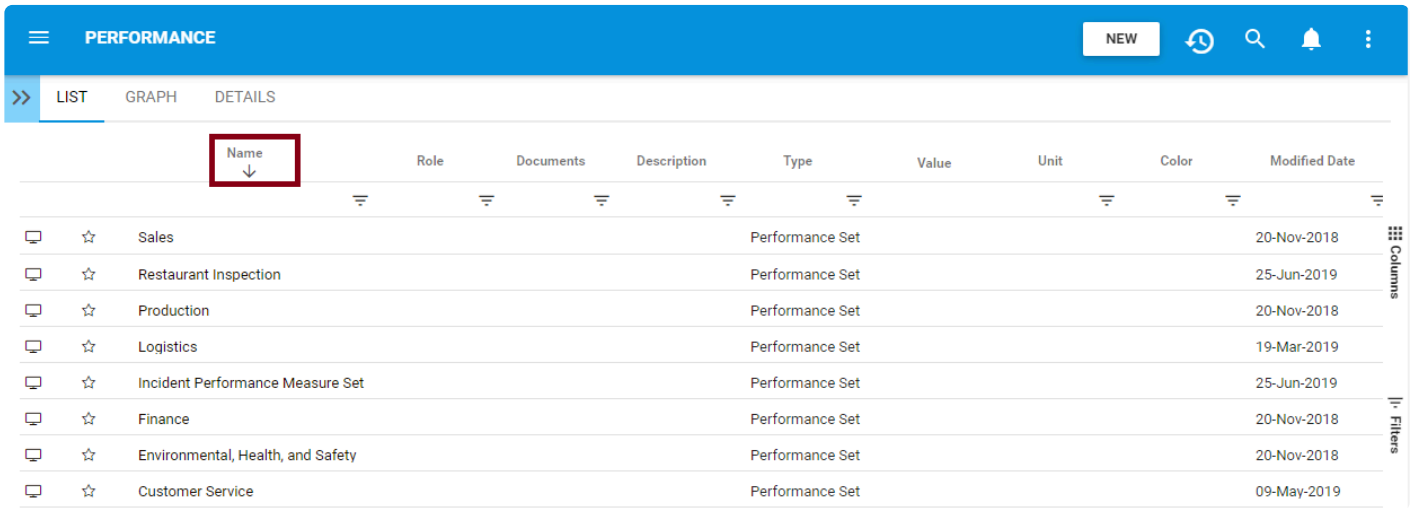
3. Click on the **Category**

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.



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



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
Identifier	Empty – The object does not have a unique identifier Not-Empty – The object has a unique identifier
Role	Empty – The object has no associated roles Not-Empty – The object has at least one associated role
Risk	Empty – The object has no associated risk Not-Empty – The object has at least one associated risk
Documents	Empty – The object has no written description Not-Empty – The object has a written description
Control	Empty – The object has no associated control Not-Empty – The object has at least one associated control
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
Subtype	Empty – The object does not have a business type associated Not-Empty – The object has at least one business type associated
Categories	Empty – The object has no category associated Not-Empty – The object has at least one associated category
My RASCI-VS	Responsible Accountable Support Consulted Informed

	Verifier Signatory
Unit	Empty – The object has no unit of measurement Not-Empty – The object has a unit of measurement
Modified Date	The specific dates that things have been modified by
Status	Shows the status of the item in question (published vs in-progress) Sent for Approval Approved Rejected Sent for Endorsement Revised
Status (Available in Show Latest)	View the status of the item in question (Published vs. in-progress) Sent for Review Approved Rejected Under Revision Revised
Locked	False – The object isn't locked True – The object is locked
Last Modify By	Textual search of last resource who last modified an object

The Filtering section will cover the following:

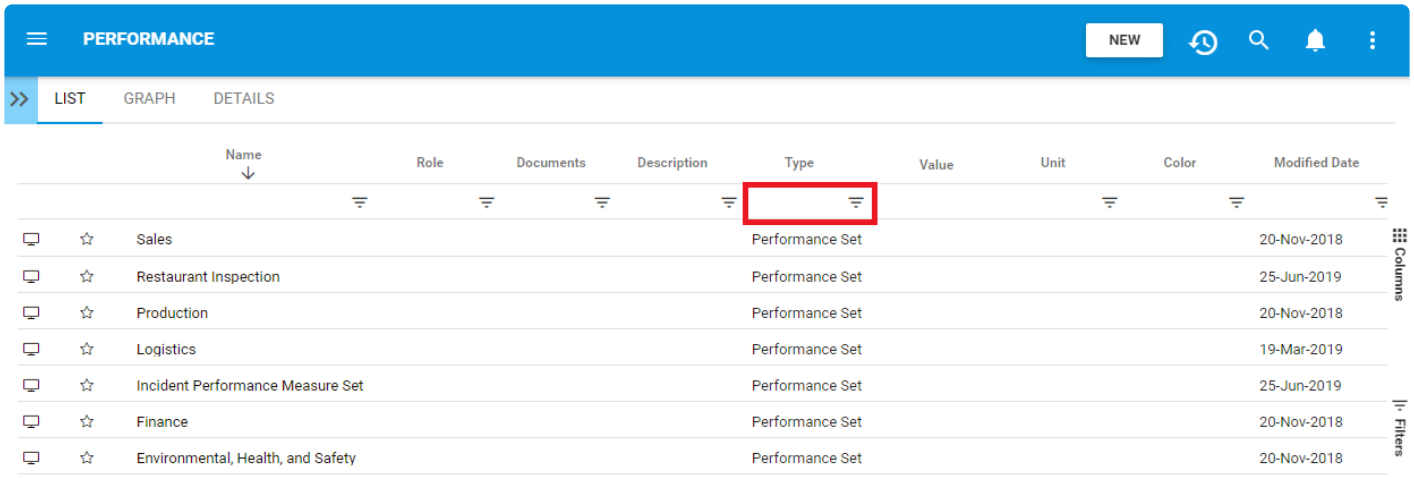
1. How to Add Filters
2. How to Remove Filters
3. How to Combine Filters

4.5.2.2.1 Add Filter

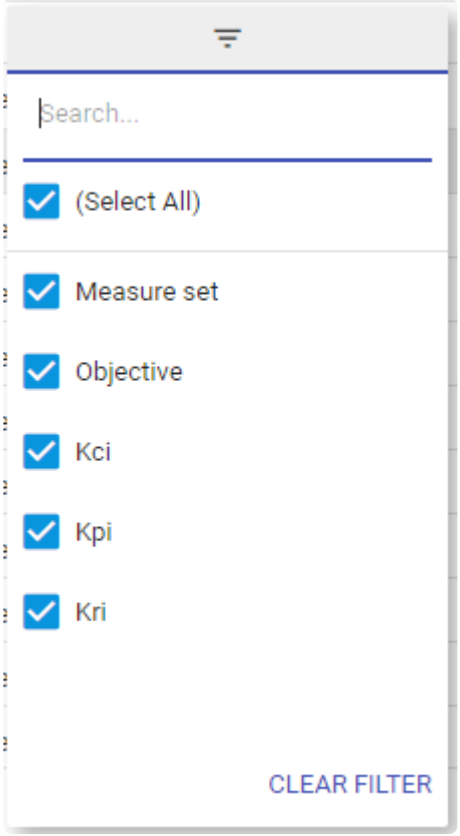
You can add filters to see performance measures and other specific objects of your choice. **Type** what you are looking for, **select** the filter in the drop-down menu, or **define the range of dates**.

How to Add Filter

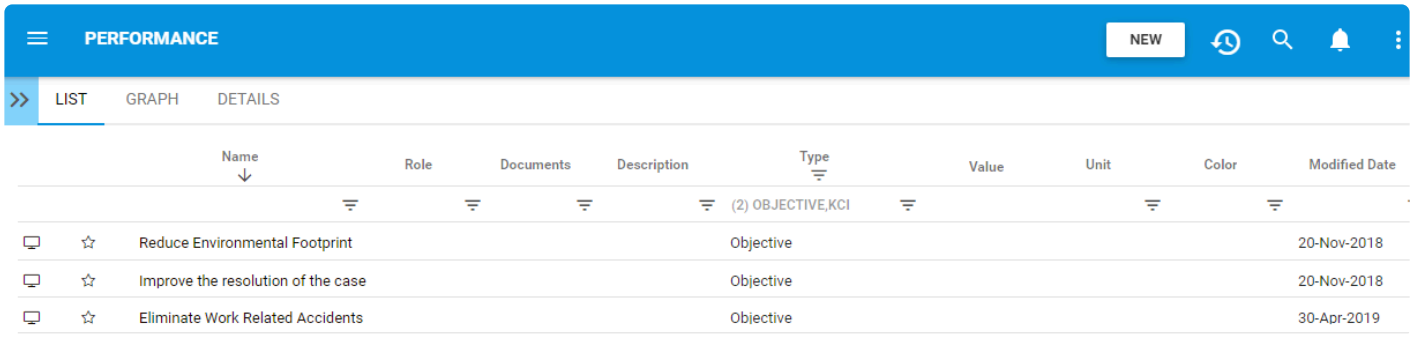
1. Navigate cursor and select the box column you wish to filter. For this example, we will use **Type**



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



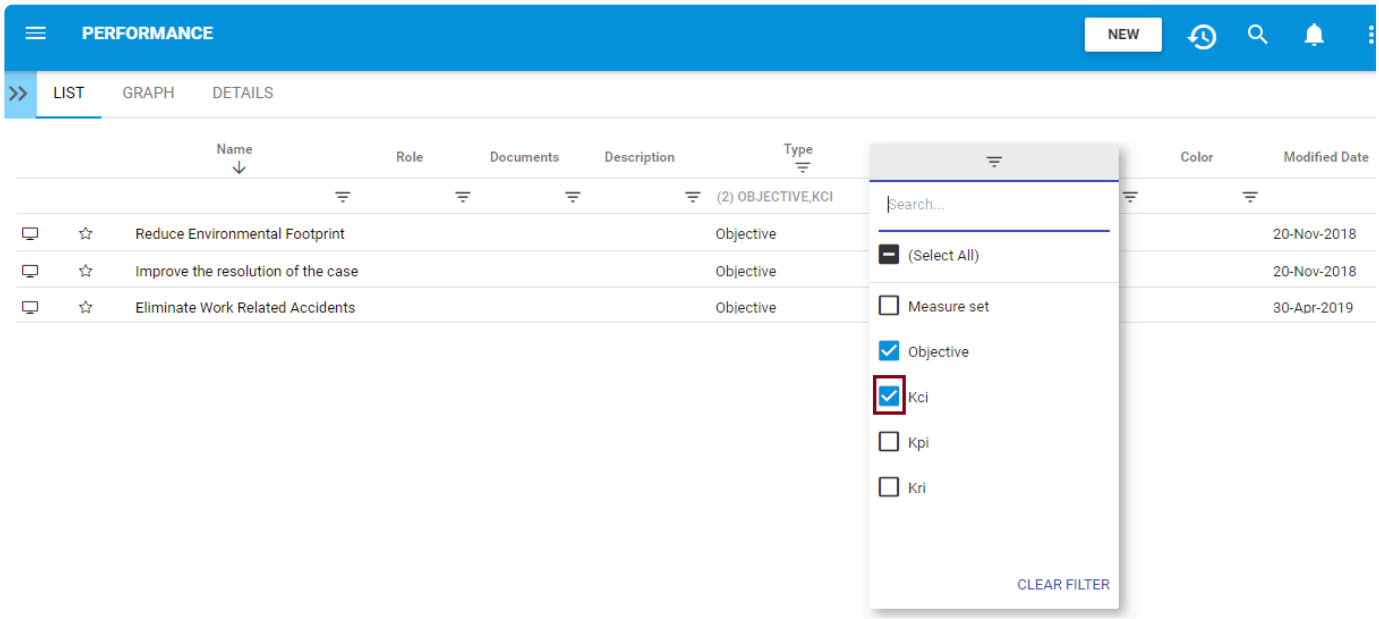
3. Select the desired filter. For this example, we will select KPI and Objective.


PERFORMANCE
NEW
LIST
GRAPH
DETAILS
Name
Role
Documents
Description
Type
Value
Unit
Color
Modified Date
(2) OBJECTIVE,KCI
Reduce Environmental Footprint
Objective
20-Nov-2018
Improve the resolution of the case
Objective
20-Nov-2018
Eliminate Work Related Accidents
Objective
30-Apr-2019

4.5.2.2.2 Remove Filter

You can remove filters; this will naturally increase the results in your list.

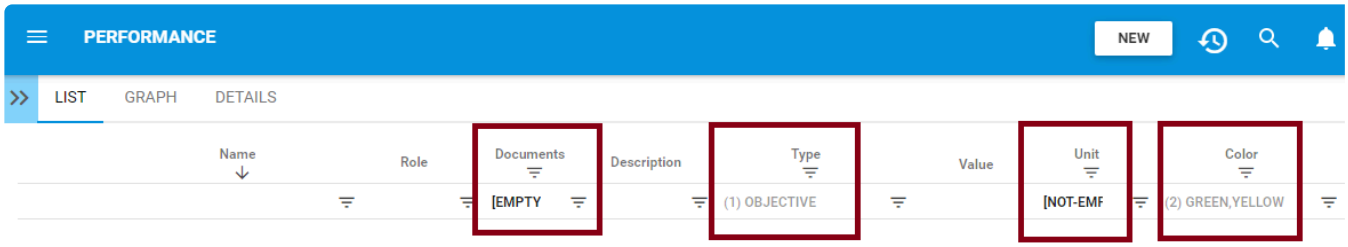
Click on the button beside the filter name.



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.



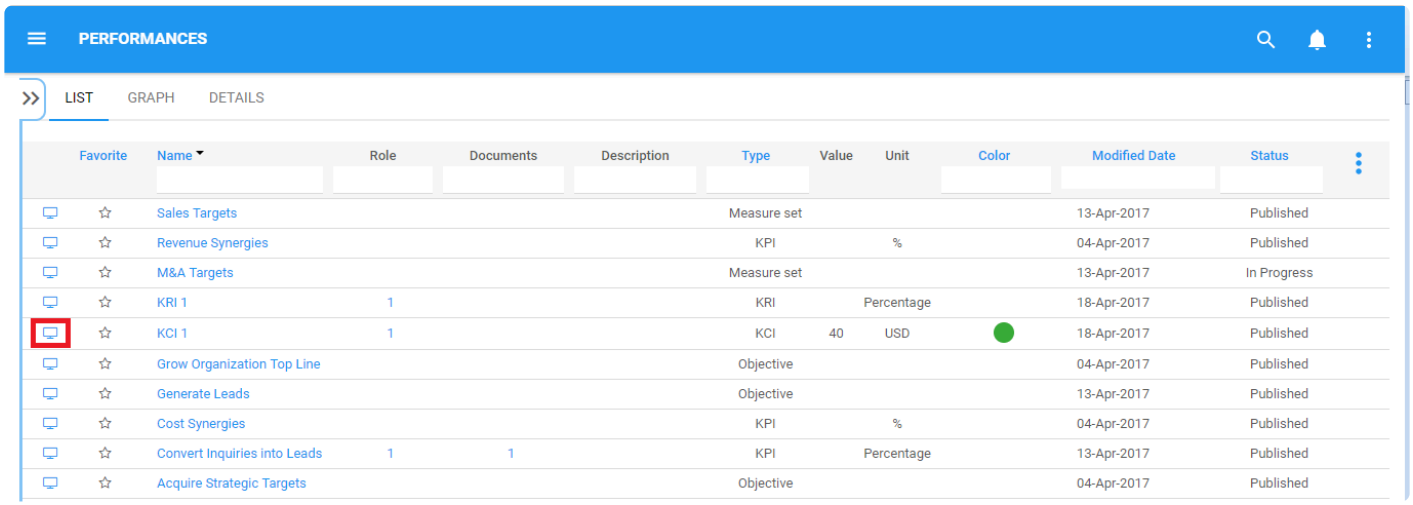
4.5.2.3 Quick Graph View

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

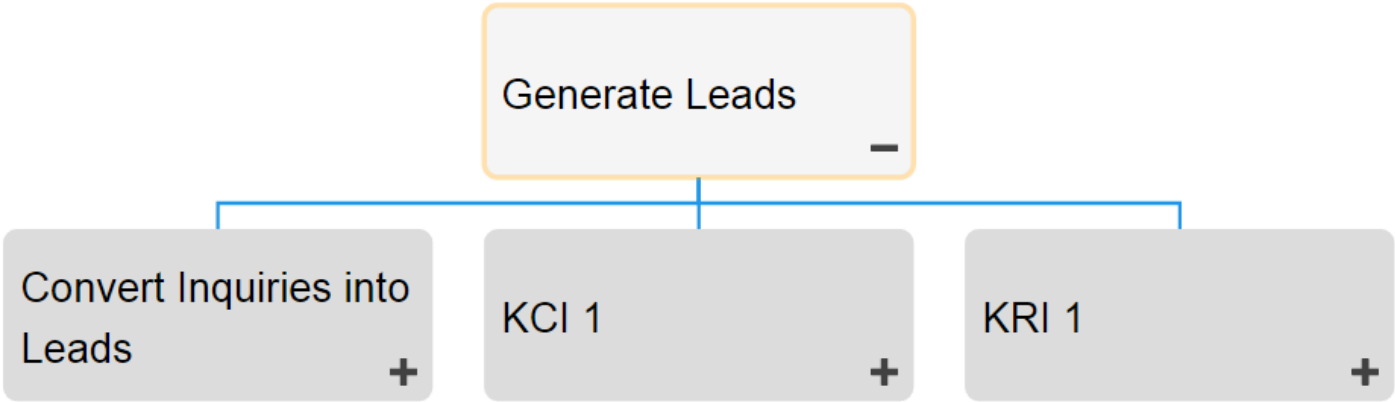
Please see the instructions below:

1. Navigate to Performance Module

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



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



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.

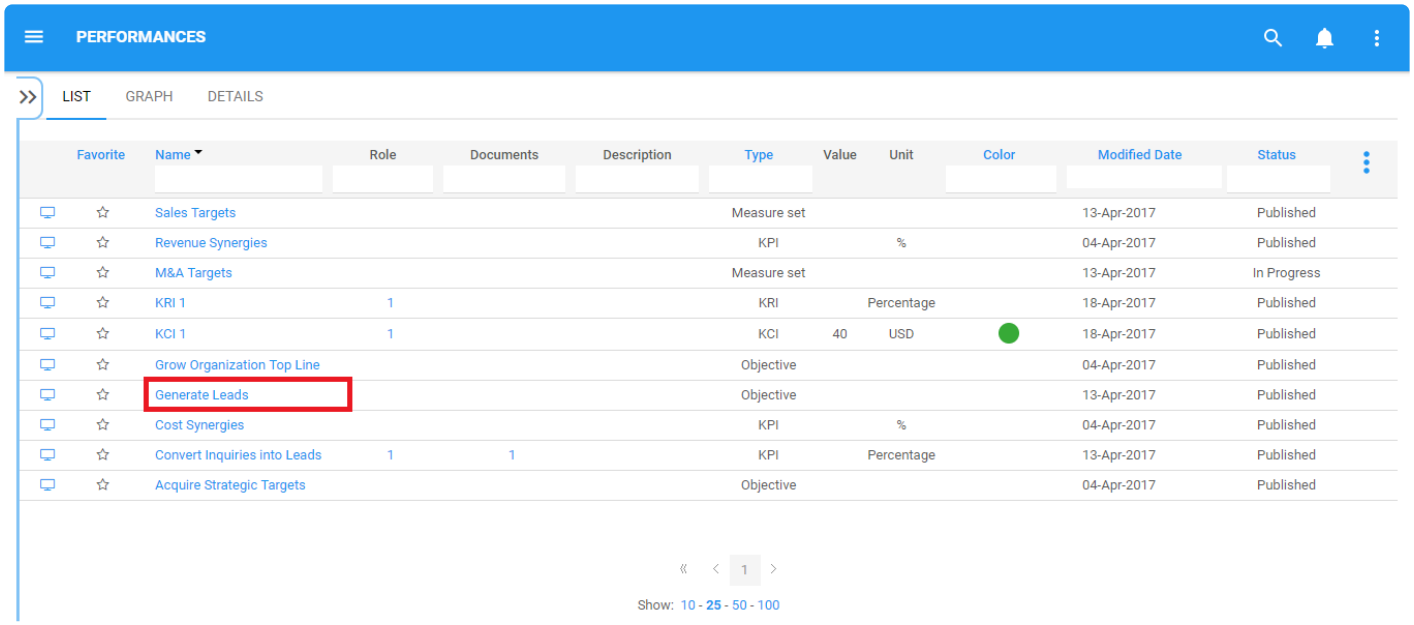
How to navigate to the Graph section (Manual Navigation)

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

2. Click on **Performance**

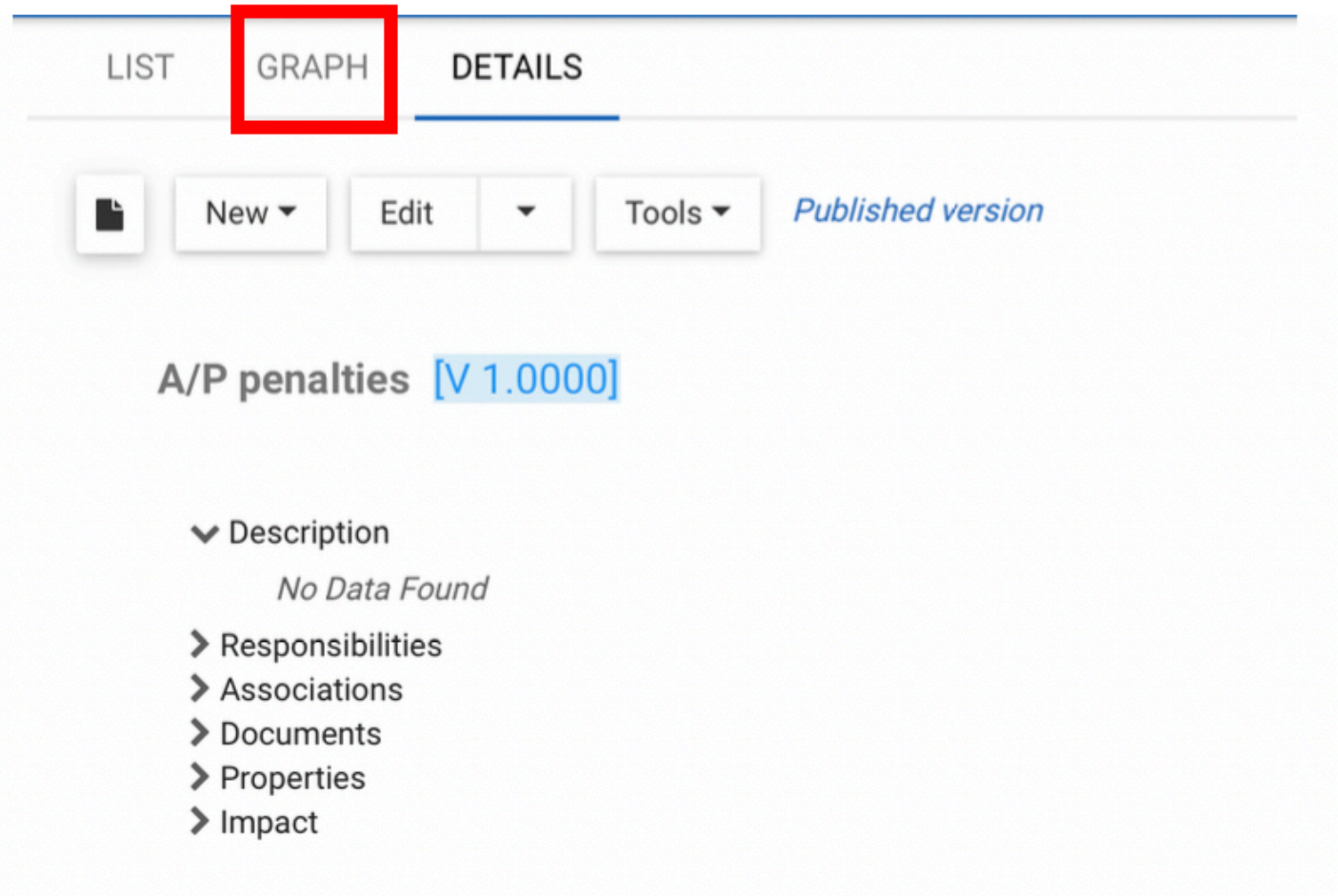
3. By default, you will be directed to **List View** in the Performance module.

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

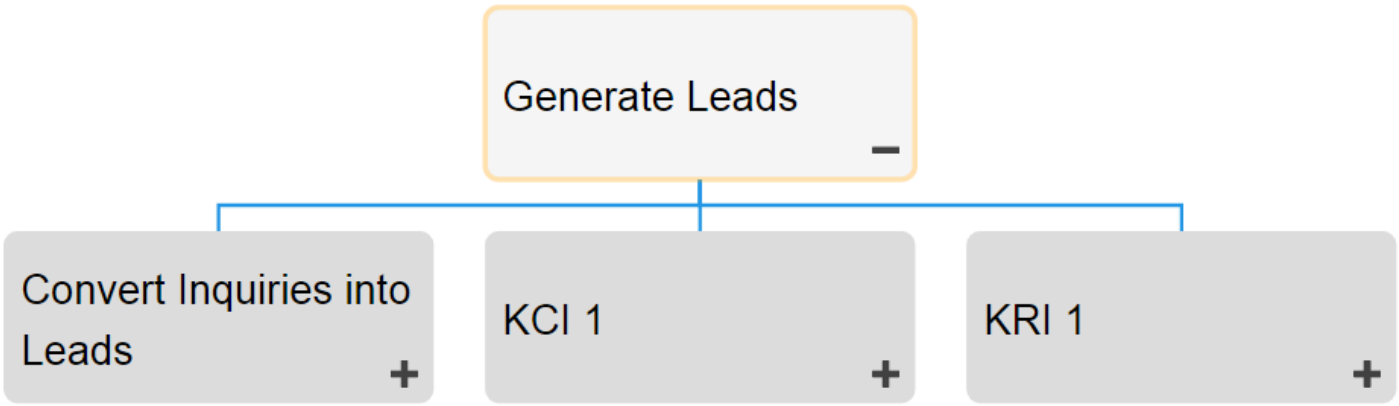


5. You will be prompted to the item’s details page

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

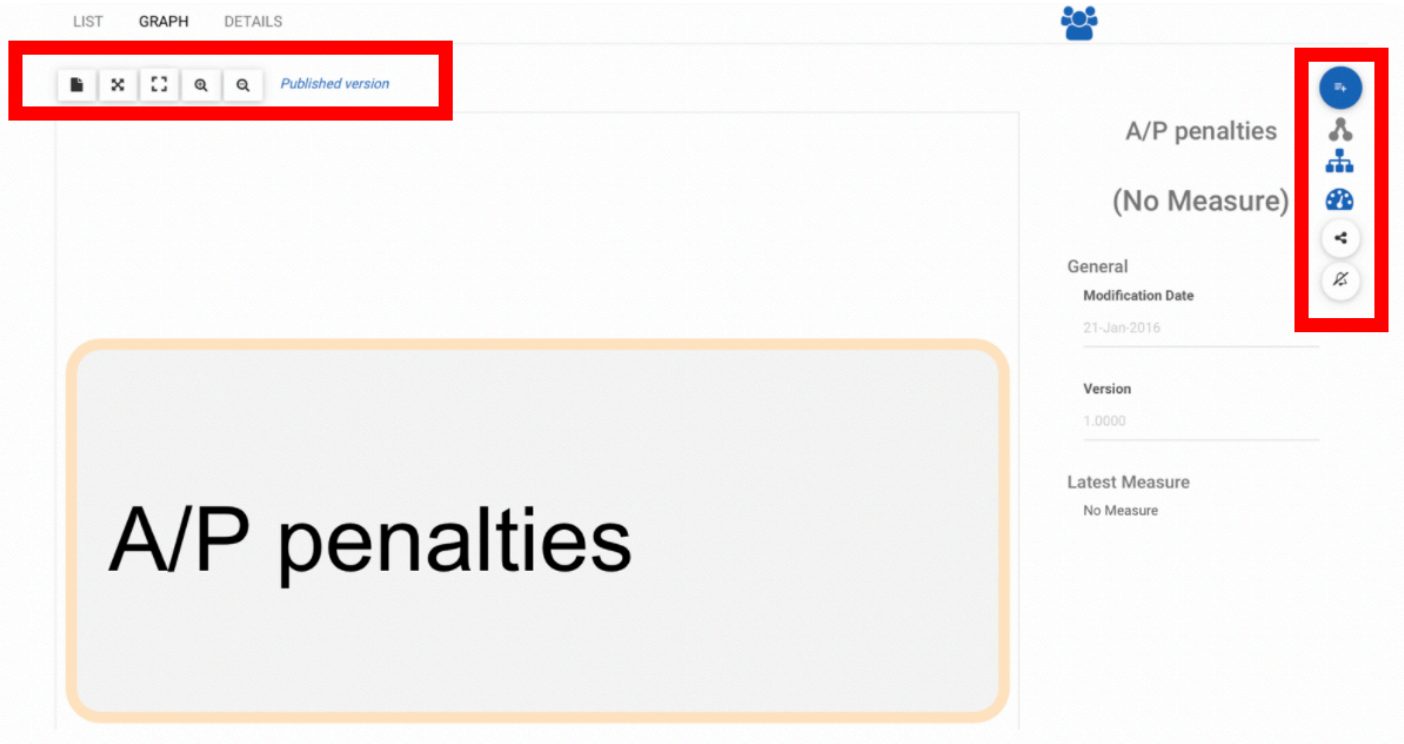


7. You will be navigated to the Graph section. By default, users will be sent to Hierarchy view as the default Graph view. An example of this view can be seen below.



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
Object Book		SOP process book generation
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

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

Item	Icon	Description
Impact Graph		Graph showing downstream representation of associated items
Hierarchy Graph		Graph showing a top-down view of performance measures and how they fit within organizations
Overview Graph		Graph showing current performance comparative to listed performance measures
Share		Copies URL to user's clipboard to share
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.

4.5.3.1.1.2 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

4.5.3.1.1.3 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

4.5.3.1.1.4 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.

4.5.3.1.1.5 Zoom Out

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

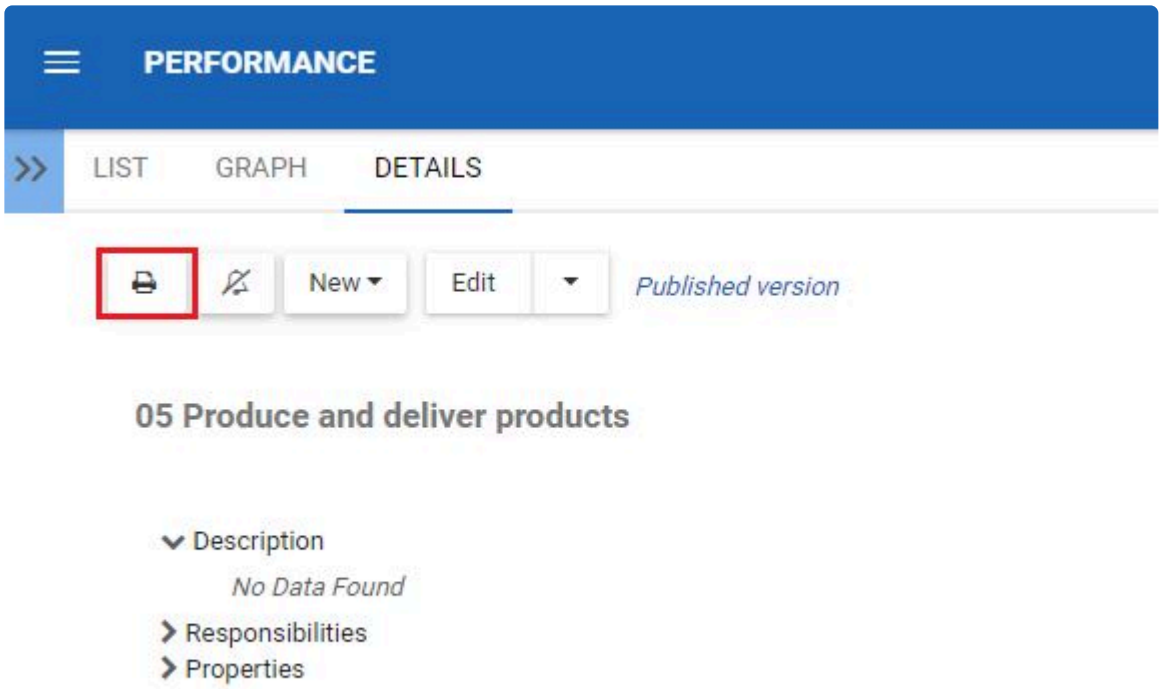
1. Navigate to a Performance Measure within the Performance Module
2. Click on the Quick Graph View icon
3. Select the Zoom in button
4. Repeat step 3 until reaching the desired Zoom

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



4.5.3.1.1.5 Settings

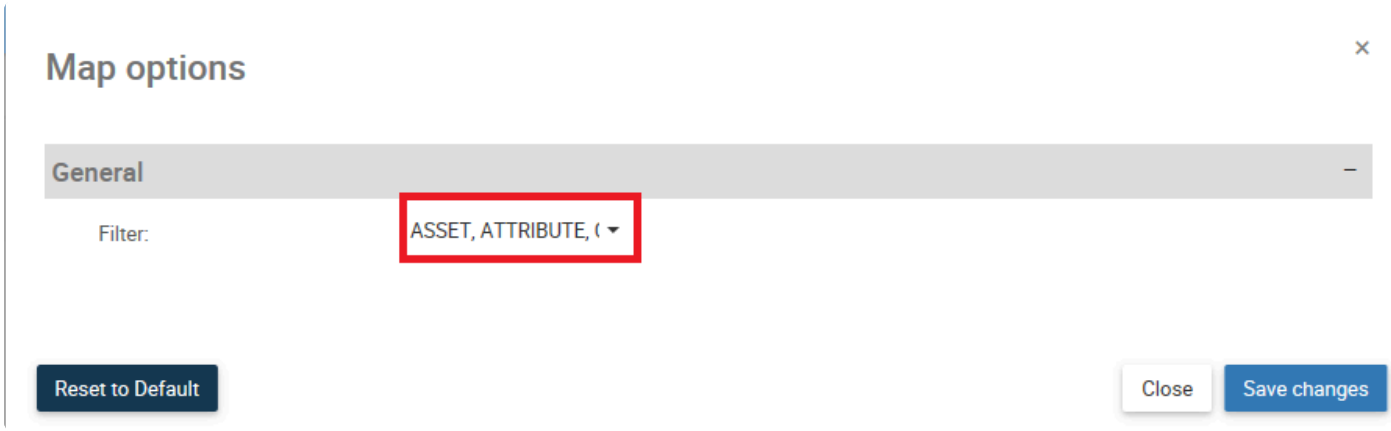
The Settings button has been added to allow users to customize the Graphs they view. Customization allows users to select exactly what is displayed in each graph, allowing them to prioritize key information in a format of their choice.

This section will cover navigation to the settings button.

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

1. Select “Settings” icon

2. Navigate cursor to “Asset, Attribute”



3. The drop-down menu will be generated

4. Select the desired filter and select “Save Changes”.

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.

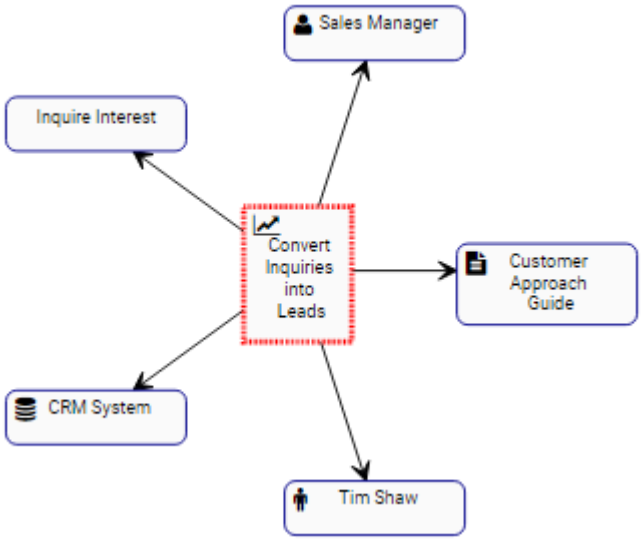
To use the Subscribe button, please see the following instructions.

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.

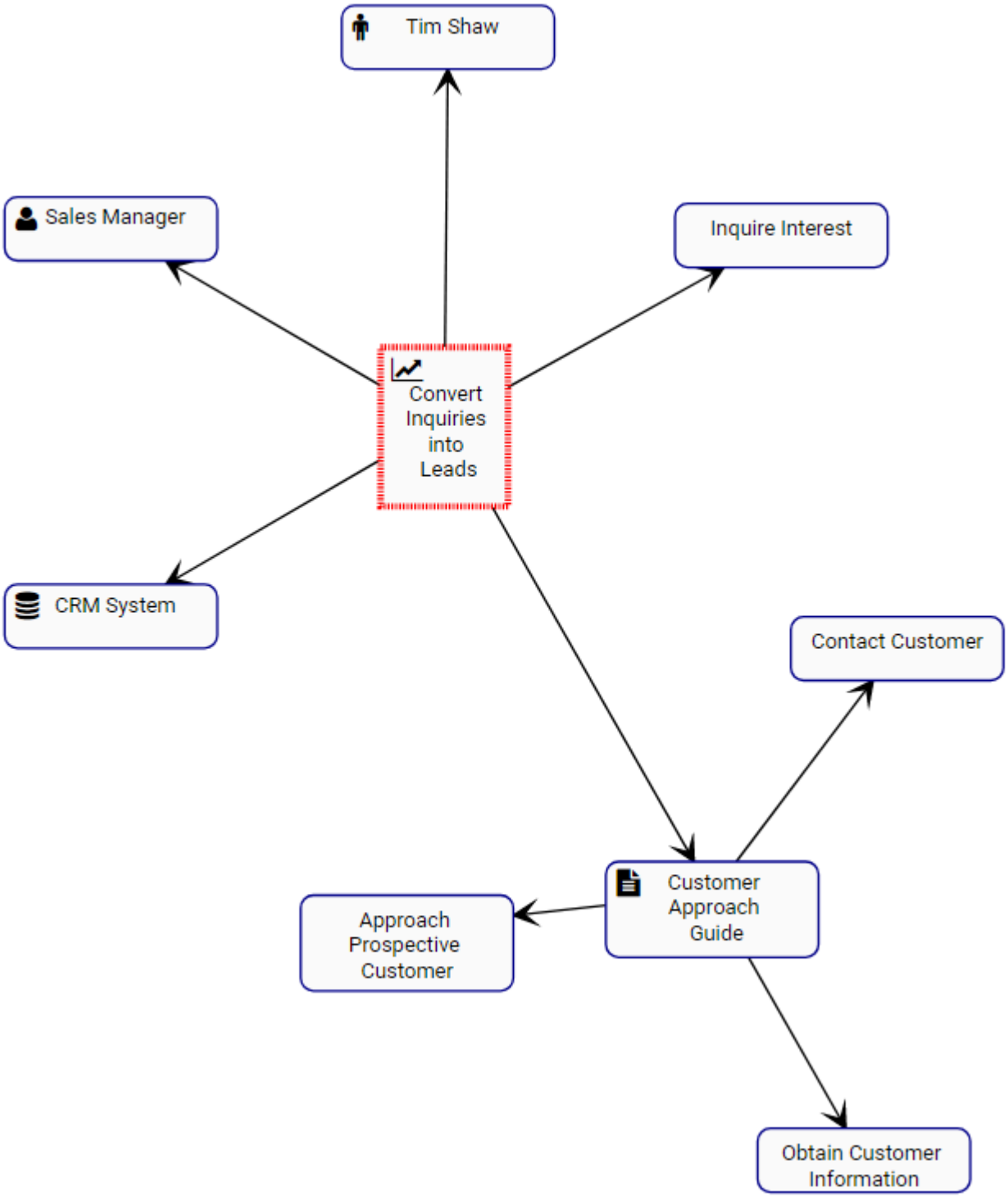
Impact Graph



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.

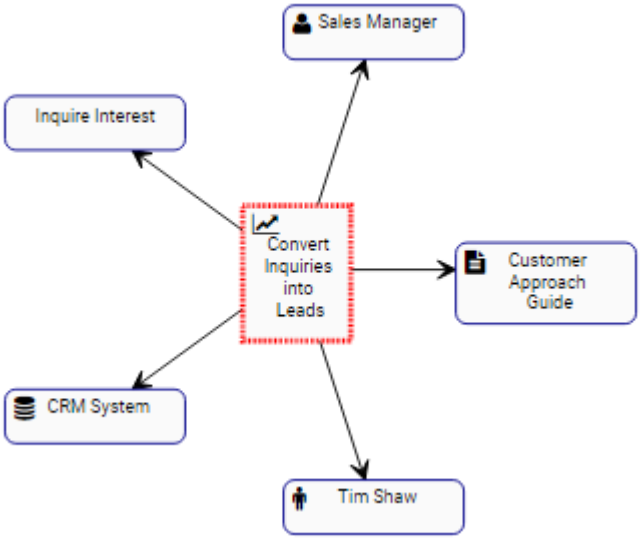
Impact Graph Navigation

To navigate to Impact Graphs, please see the following instructions.
1. Navigate to a Performance Measure (KPI, KCI or KRI) within the Performance Module

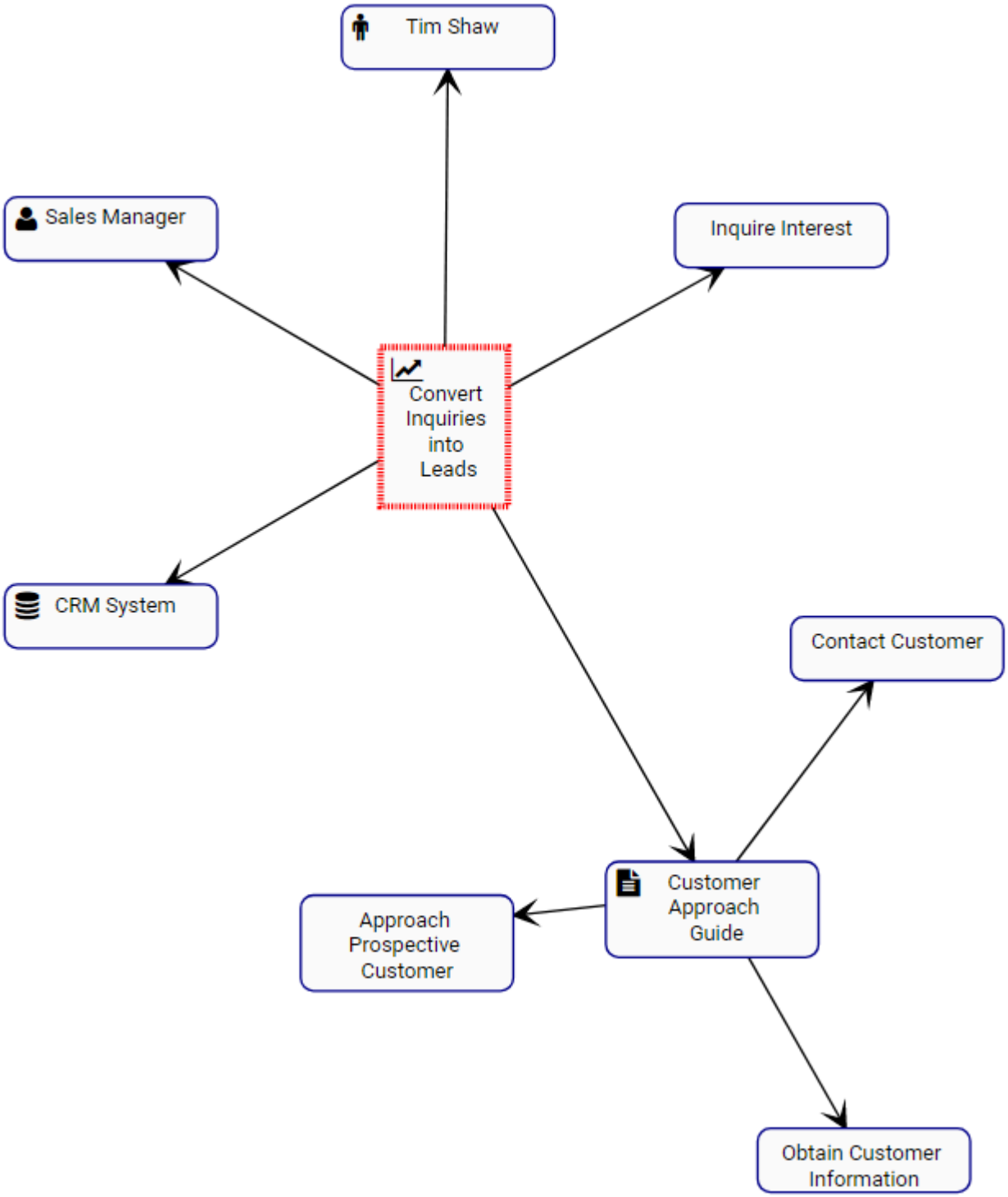
2. Click on the “Quick Graph View” icon

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



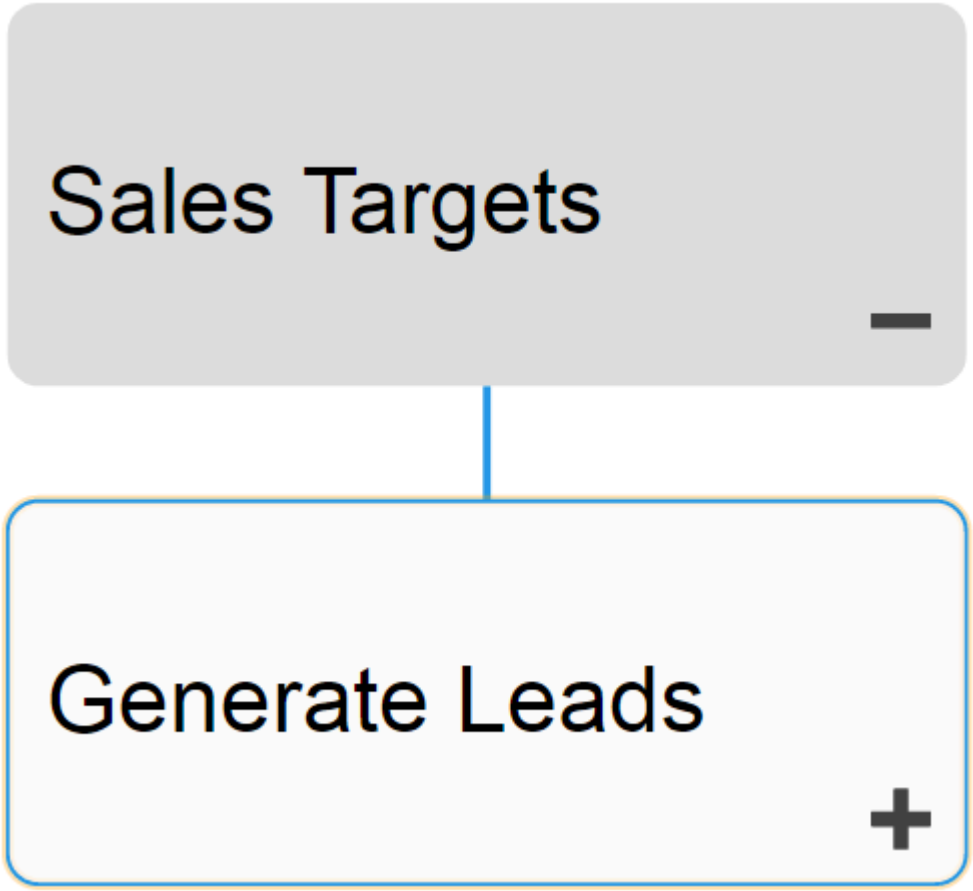
5. (Optional) To further expand the Impact Graph, simply double-click on the item to which you would like to display


Tim Shaw
Sales Manager
Inquire Interest
Convert Inquiries into Leads
CRM System
Contact Customer
Customer Approach Guide
Approach Prospective Customer
Obtain Customer Information

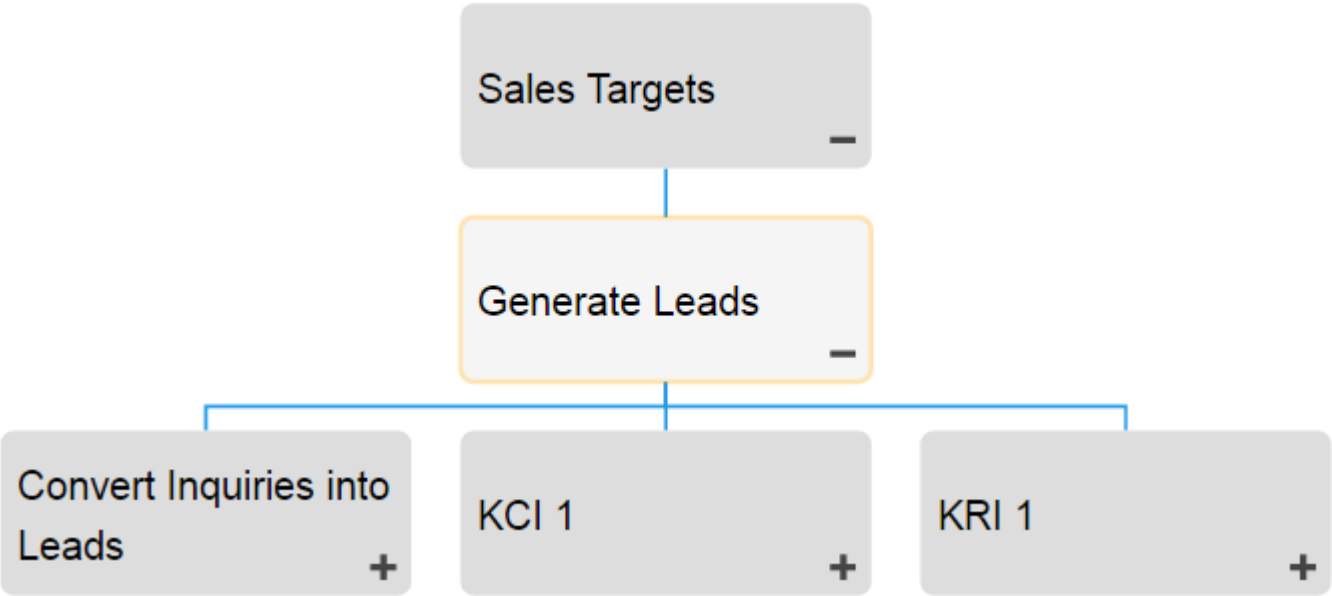
4.5.3.3 Hierarchy Graph

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

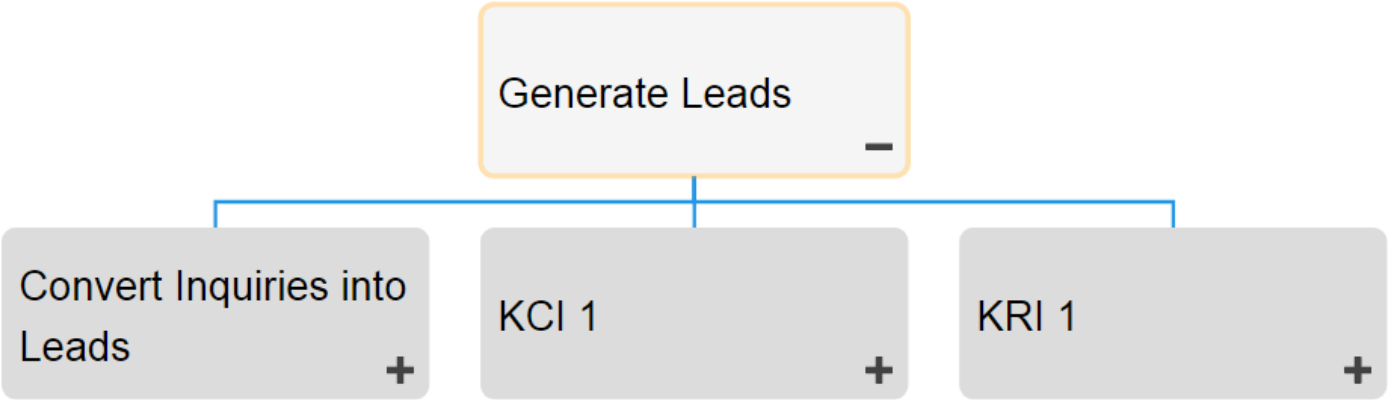
2. Select the item to which you would like to view.

> 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

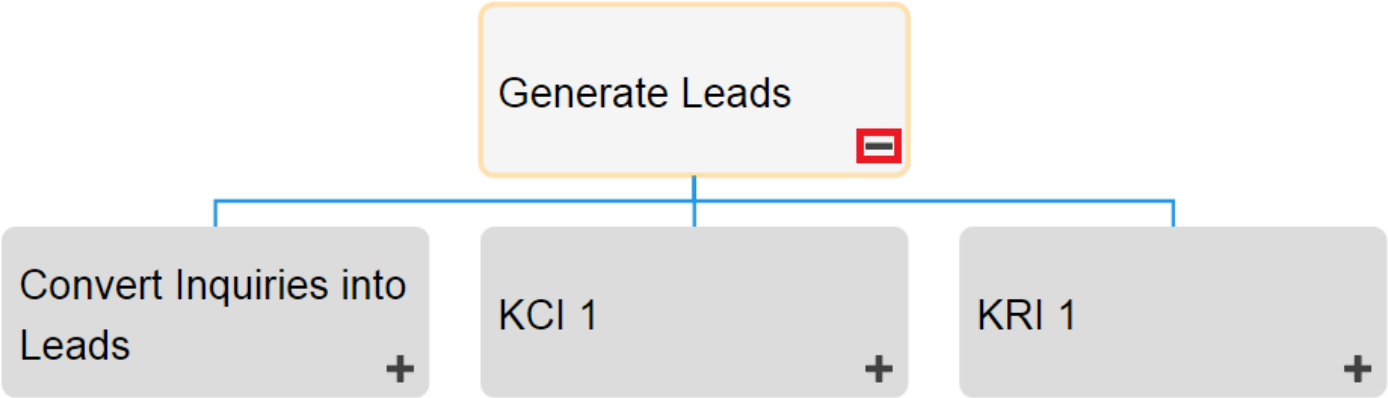
4. You will be navigated to the “Objectives” Hierarchy Graph. The entire set will not be fully displayed upon initial navigation and will display the individual item selected.

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


Generate Leads
Convert Inquiries into Leads
KCI 1
KRI 1

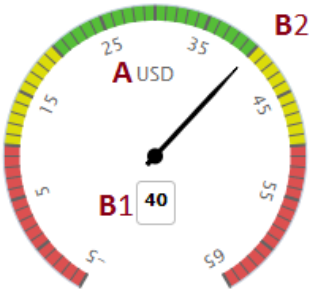
4.5.3.4 Overview Graph

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

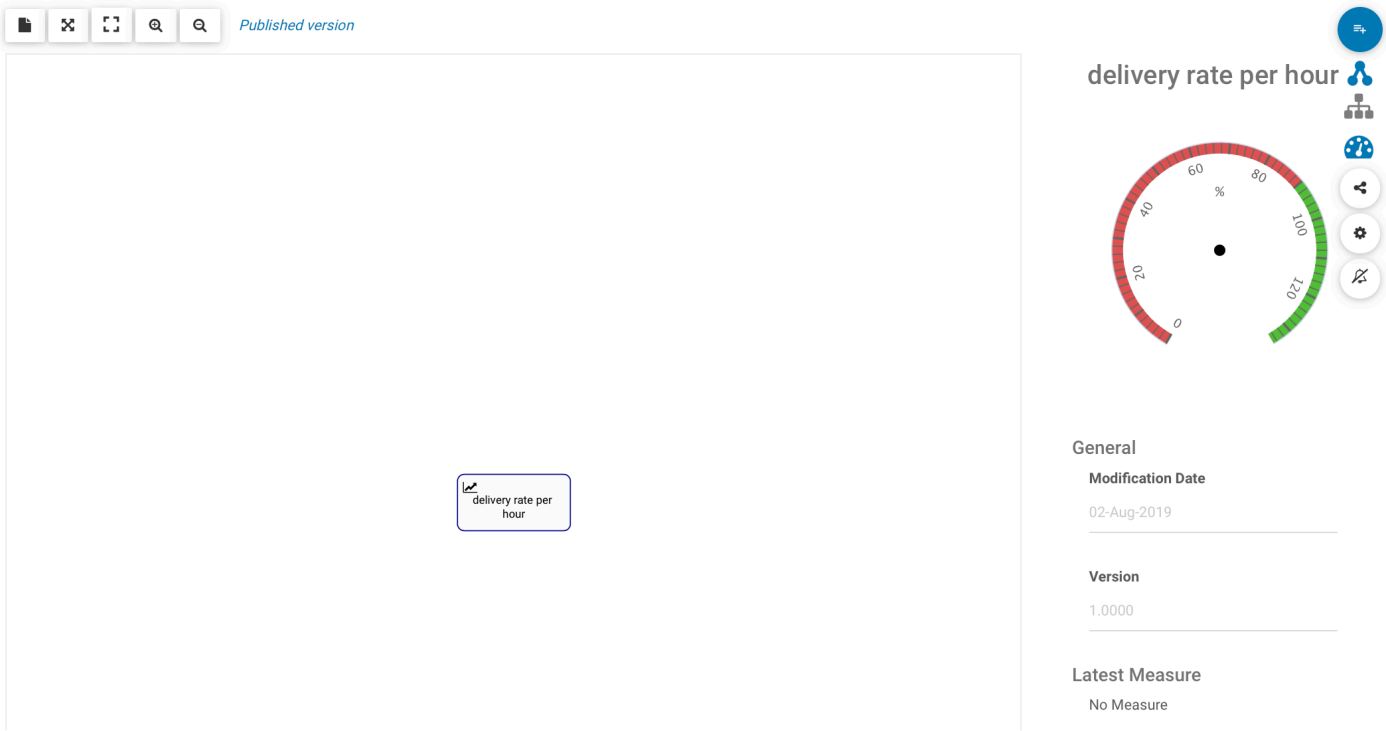
Measure: Date: 24-Apr-2017 Comment: + Add

D List of Measures

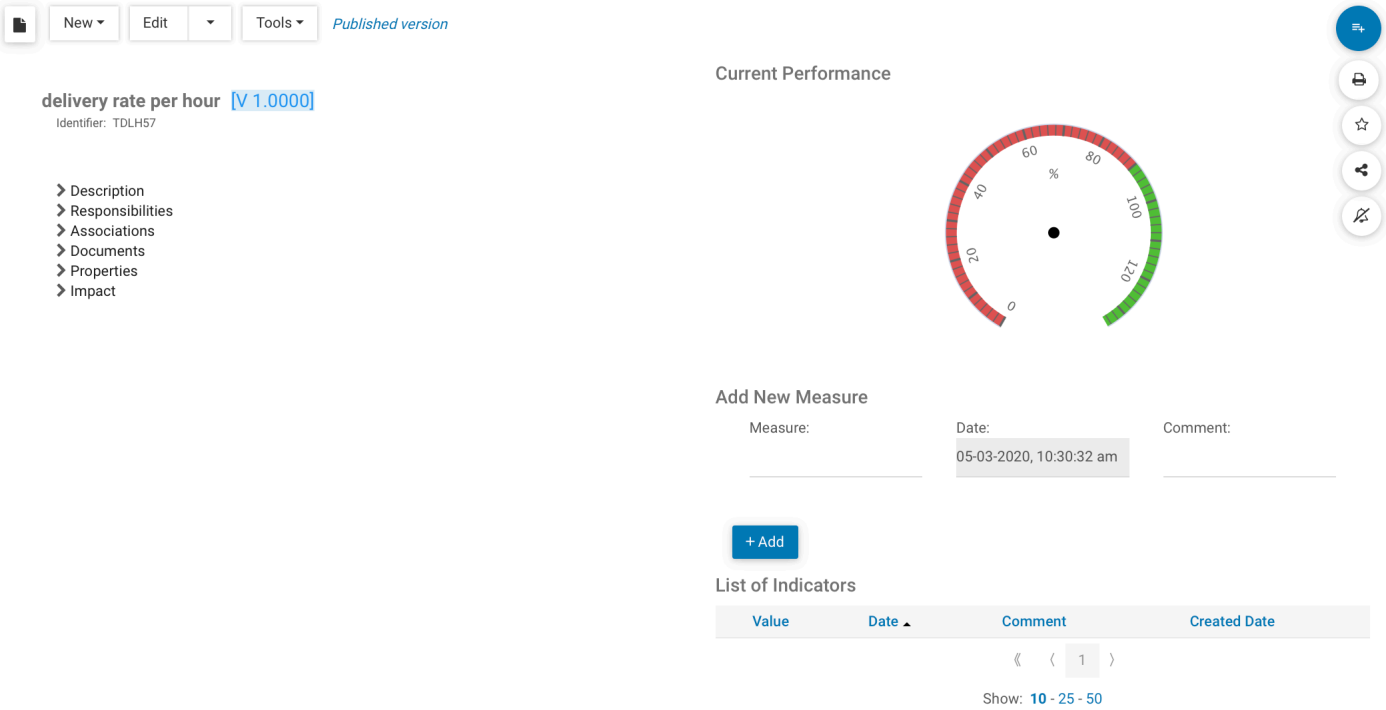
Value	Date	Comment	Created Date	
40.00	24-Apr-2017	Measure 5	24-Apr-2017	
30.00	23-Apr-2017	Measure 4	24-Apr-2017	
15.00	12-Apr-2017	Measure 3	24-Apr-2017	
20.00	07-Apr-2017	Measure 2	24-Apr-2017	
10.00	03-Apr-2017	Measure 1	24-Apr-2017	

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

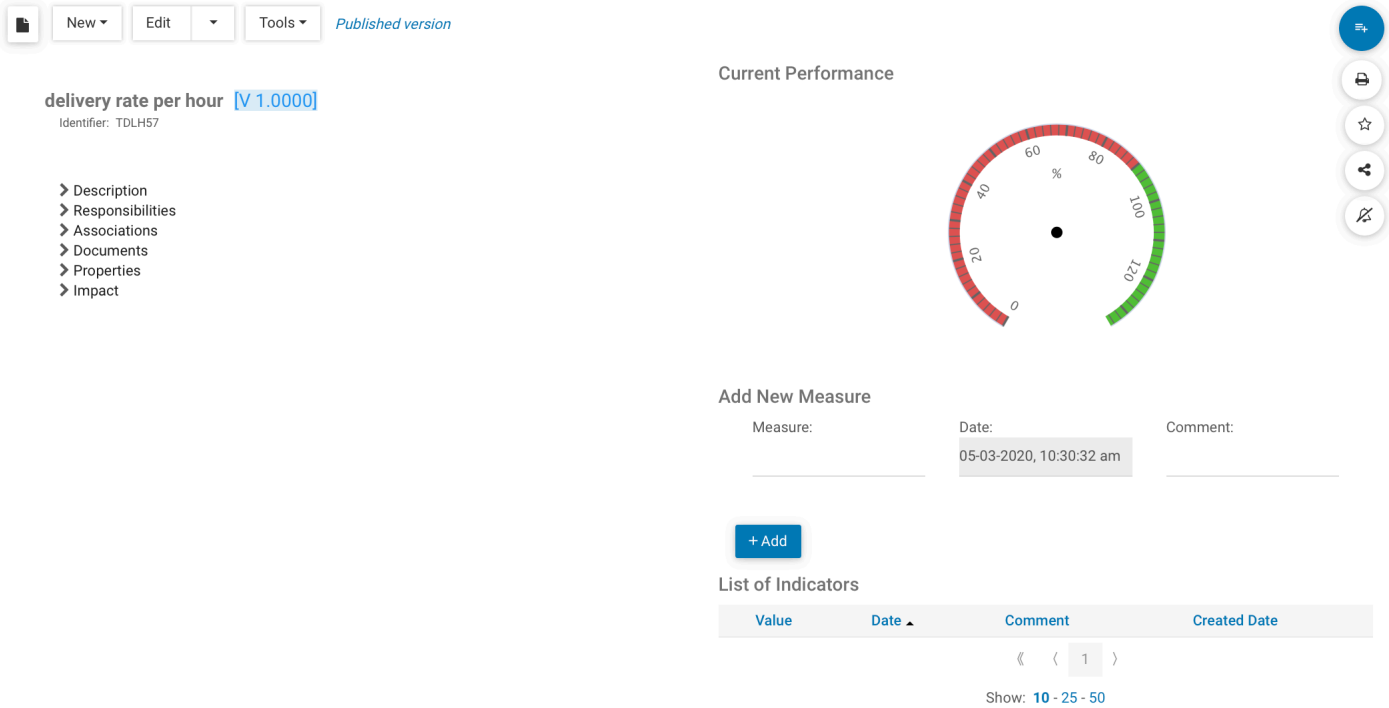
Users can input performance measure data. This provides users an outlet to report key metrics that in turn, can be monitored and tracked within the EPC. Uploading performance measures within the EPC allows managers to oversee performance specific information that can be corroborated with other sources.

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

1. Navigate to a Performance Measure within the Performance Module

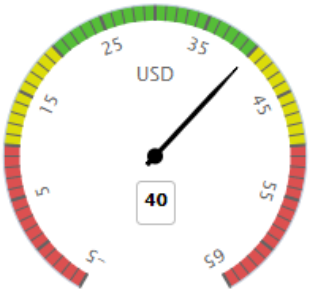
2. Navigate to the details page

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: 24-Apr-2017 Comment: + Add

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.

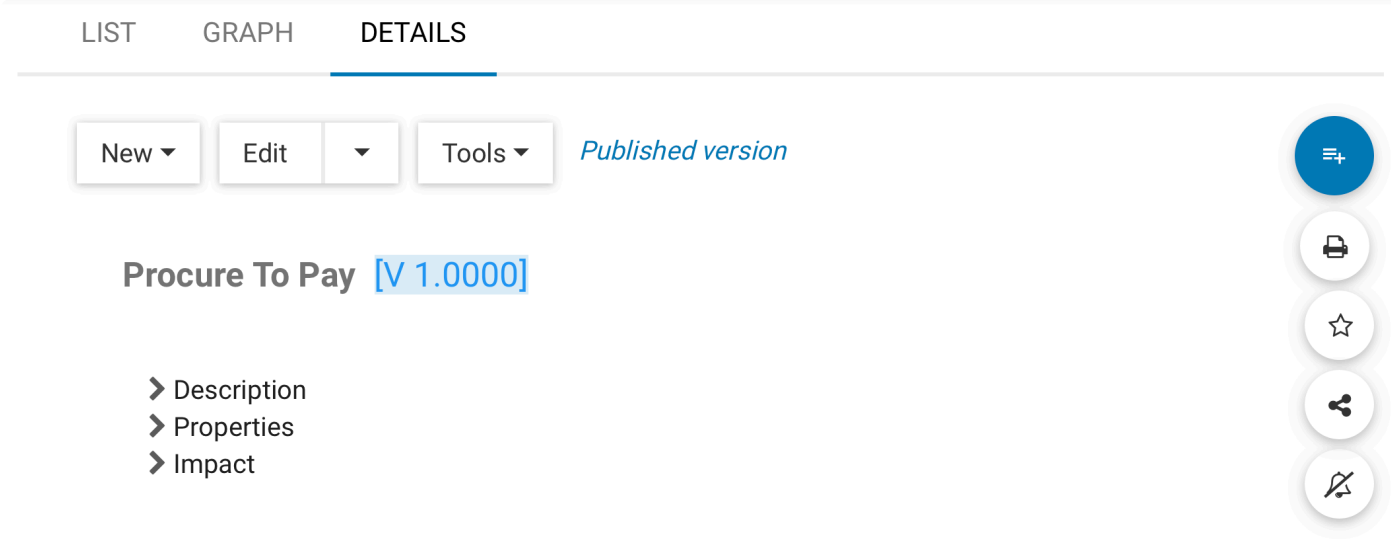
4.5.4 Details

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

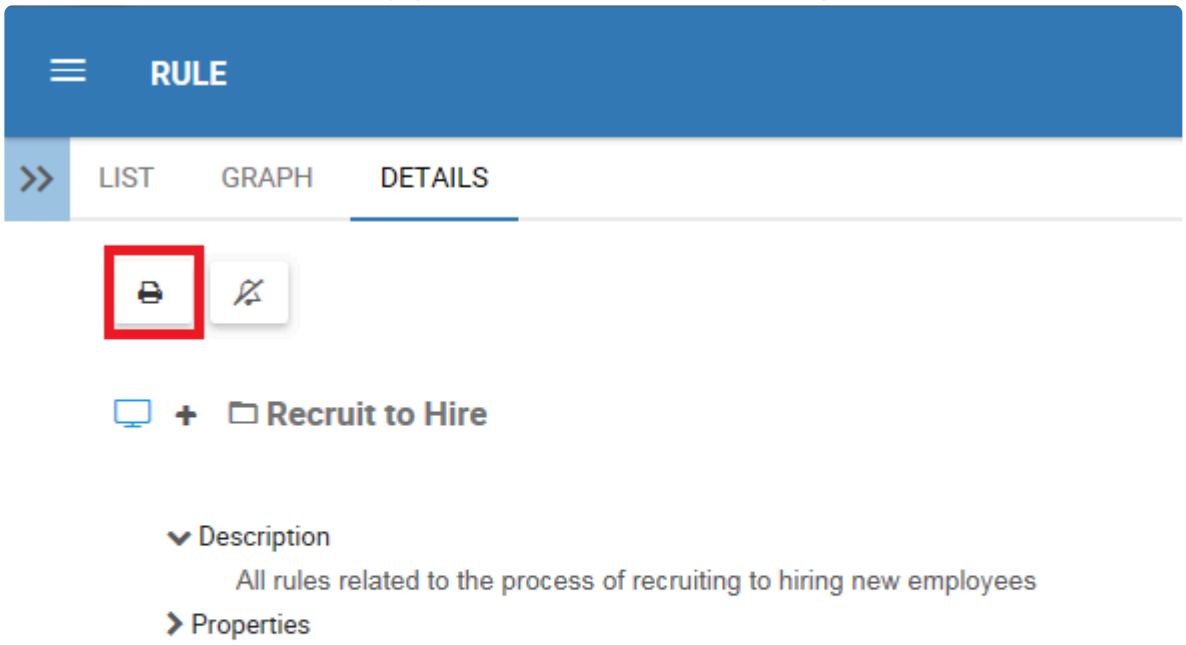
The toolbar provides users with a variety of functions to navigate and leverage the details page.



Item	Icon	Descriptions
Print		This button will allow a user to print the details page being viewed
Favorite		Allows users to sort by favorites in the “My Actions” widget
Share		Copies URL to user’s clipboard to share
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.



4.5.4.1.4 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 .

4.5.4.2 Attributes

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

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

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

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

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

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

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

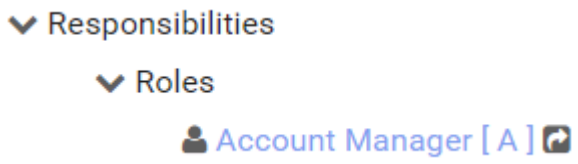
4.5.4.2.1 Description

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

To navigate directly to the object, click on the icon.



Users can click on the specific item's name to view its details in a popup. To navigate to the object's page, click on **Go To Object**

4.5.4.2.3 Association Sections

The associations sections lists all of the Documents, Rules, Risks, and Controls that are assigned to the objective or performance measure. This allows users to quickly see what specific items have been tied to.

The **Documents** section will include all the documents associated to the process.

The **Rules, Regulations & Policies** section will include all the rules associated to the process.

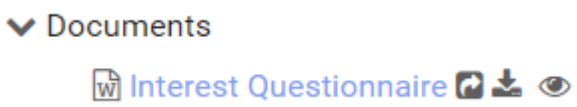
The **Risks & Controls** section will include all the risk & controls associated to the process.

© 2020 Interfacing Technologies Corporation

4.5.4.2.4 Documents

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

To navigate directly to the object, click on the icon.



Users can preview or download the document.

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

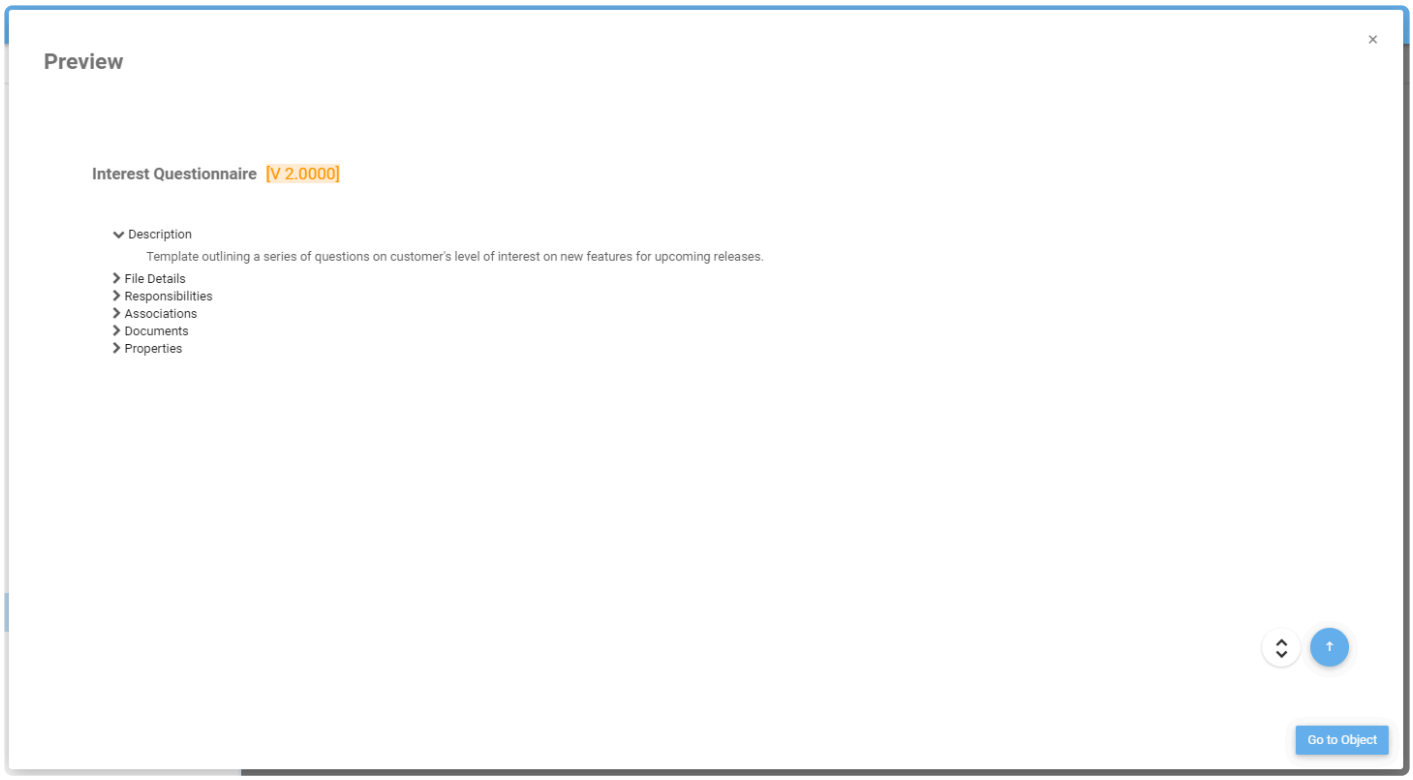
2. **Download**: To download the document click on the icon

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 •	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

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

Users can click on the document's name to preview its details in a popup. To navigate to the document's detail page, click on **Go To Object**



4.5.4.2.5 Versioning

The **Versioning** section provides users with additional key information about items. This section is broken down into 3 categories:

1.**Current Version**: Provides information about what version is being viewed, and when the latest modification has been made
2.**Version History**: Provides information on previous versions of the performance object. Includes major and minor versions, status, author and date.
3.**Analysis**: Provides information that better allows users to analyze items and related key details.

Current Version

Version Number: 0.0007

Last Modified: a month ago

Version History

Version Number	Status	Author	Date
0.0007	In Progress	Dia Apostolakis (Dia)	February 13, 2019 2:31 PM
0.0006	In Progress	Dia Apostolakis (Dia)	February 13, 2019 2:30 PM
0.0005	In Progress	scott Armstrong (Scott)	December 14, 2018 12:25 PM
0.0004	In Progress	scott Armstrong (Scott)	December 14, 2018 12:25 PM
0.0003	In Progress	scott Armstrong (Scott)	December 14, 2018 12:25 PM
0.0002	In Progress	scott Armstrong (Scott)	December 14, 2018 12:24 PM
0.0001	In Progress	scott Armstrong (Scott)	December 13, 2018 8:47 AM

Analysis

FREQUENCY	Yearly

4.5.4.2.6 Impacts

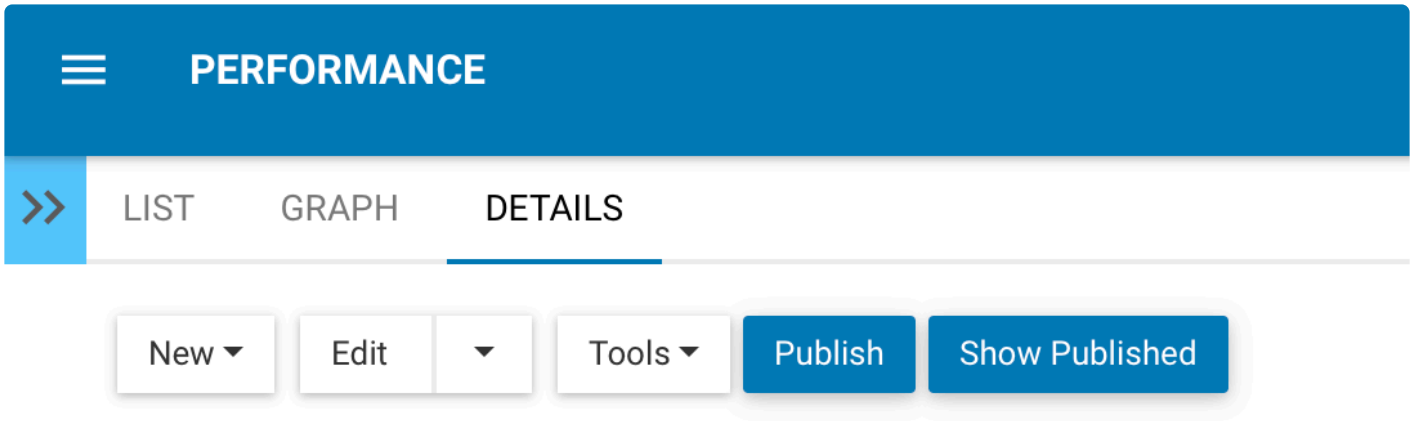
Users are able to view the impacts an object has on others in a list form in the Details view of any object. It is a complement to the Impact Graph, and another way of visualizing impact data.

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 to an object. Impacts 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.

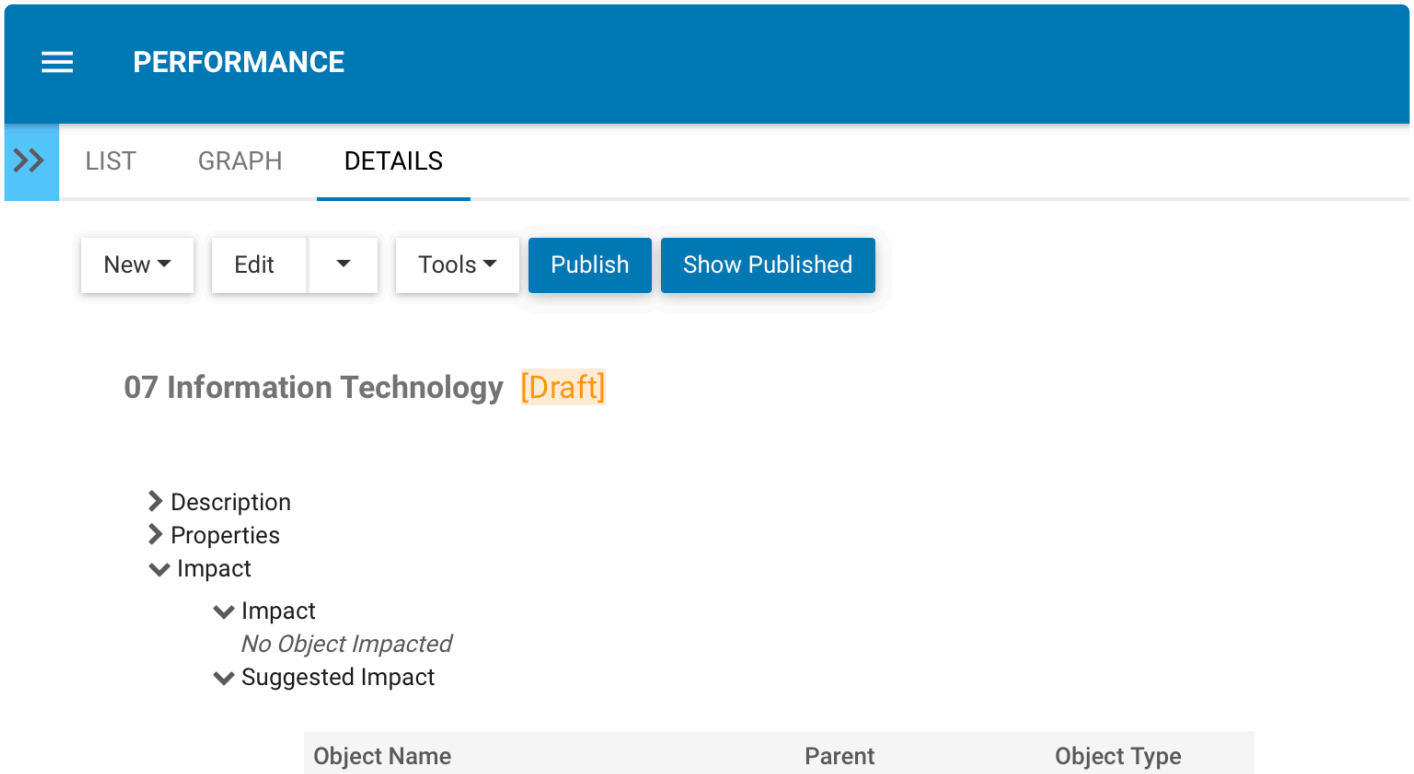
> The impact list will only show **direct** impacts, as opposed to the impact graph, which can be expanded to show **indirect** impacts on an object

Navigating to the Impact List

1. Navigate to any Detail page of any object in EPC



2. At the bottom of the Details page, click on Impact to expand the section



3. All direct impacts associated to the EPC Object will be listed.

> To sort a column by alphabetical order, click on it's header. The arrow pointing up indicates sorting in **Ascending Order**, the arrow pointing down indicates sorting in **Descending Order**, and no arrow indicates **No Sorting**.

Object Name A	Parent B	Object Type C	Assignment Type D	Justification E	Impact Type F	Status G
[Default Template] Analysis (A4 - Lands...	Default template folder	Document	Directly Impacts		Association	Published
Document should be reviewed every yea...	Import Folder	Rule	Directly Impacts		Association	Published
Enforce a zero-tolerance policy for dang...	Import Folder	Control	Directly Impacts		Association	Published
Onboarding cost	Imported Objective	KPI	Directly Impacts		Association	Published
Ratio of candidates to hires	Imported Objective	KPI	Directly Impacts		Association	Published
Risk B - with risk analysis!	Import Folder	Risk	Directly Impacts		Association	Published
Warehouse	Imported Measure Set	Objective	Directly Impacts		Association	Published

A	Object Name	The Name of the object. Click on the hyperlink to go to the object
B	Parent	The Parent of the object
C	Object Type	The type of the object

D	Assignment Type	The relationship type between the two objects
E	Justification	The justification of the object
F	Impact Type	How does this object impact the current object
G	Status	The status of the object (In Progress or Published)

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.

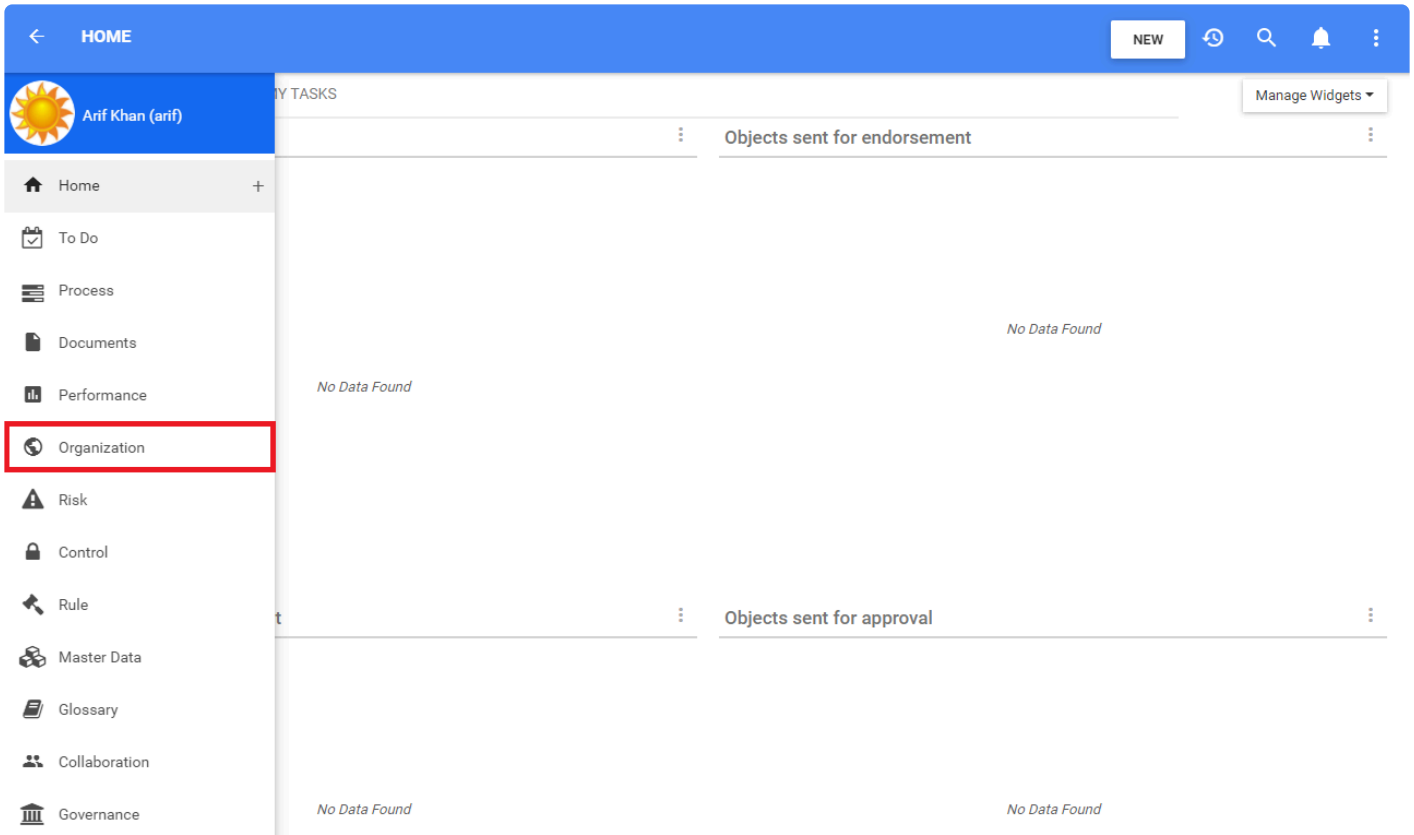
Dimension	Details
1. List	Provides view of all items that you have access to
2. Graph	Provides the visual representation of an organization, their features and links (Impact, Hierarchy Graphs)
3. Details	Provides additional key information regarding specific items (Org Units, Assets, Roles, Resources)

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:

List	Description
1. No hierarchy filter	A list view where **all** items within the given module are listed
2. Current level & below	A list view where **all levels below** the selected item are listed
3. Current level	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
Parent	Whether or not there is a Parent included with the object
Identifier	Textual search for any existing unique identifier of an object
Description	Whether or not there is a description included with the object
Documents	Whether or not there are Documents directly associated with the item in question
Type	The type of the object
Subtype	Whether or not if this object is classified as a business type
Categories	Whether or not there are Categories directly associated with the item in question
Modified Date	The last date that the object in question was modified
Last Modified By	The name of the last resource that modified the object
Status (Available in Show Latest)	View the status of the item in question (Published vs. in-progress)

© 2020 Interfacing Technologies Corporation

Locked	Whether the item in question is currently locked or not

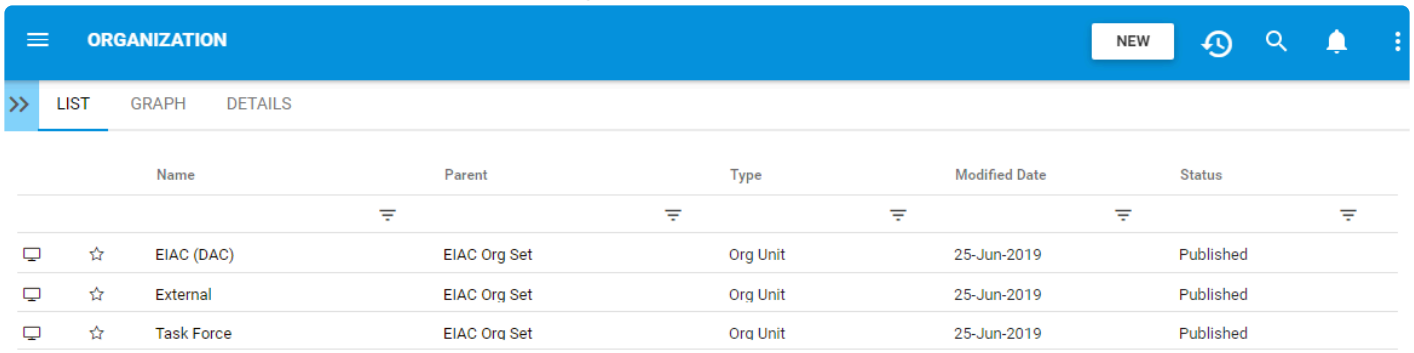
> The number of columns displayed will be contingent on the user's screen resolution.

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).



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-processes, users must select the filter panel and then select "Current level & below of the EPC Web App.

5. **(Optional)** Click on the filter setting and it will generate a list view

> 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

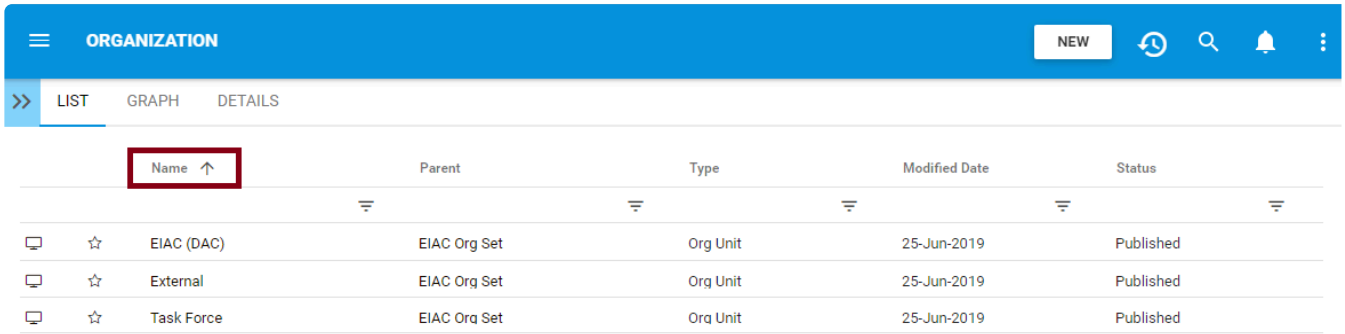
1. Navigate to the Organization Module

2. Navigate Cursor to desired **Category**

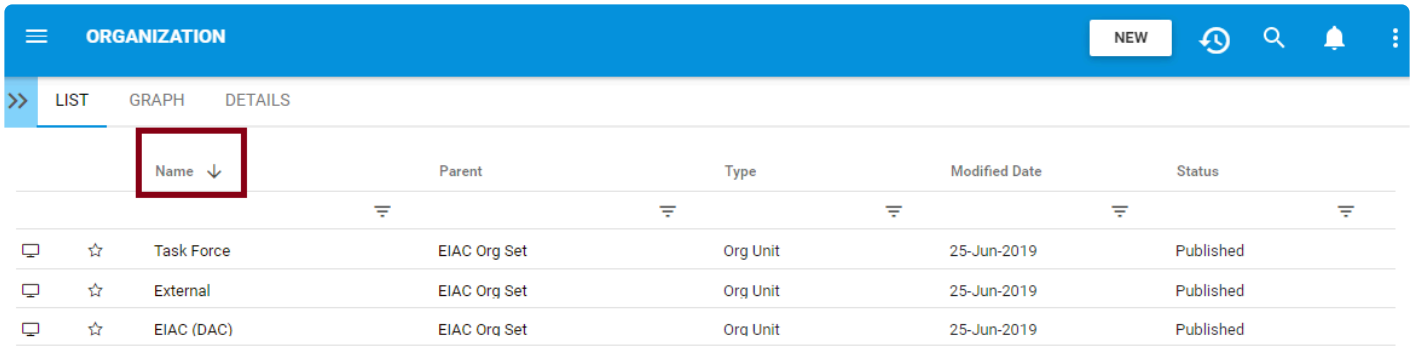
3. Click on the **Category**

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.



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


ORGANIZATION
NEW
LIST
GRAPH
DETAILS
Name
Parent
Type
Modified Date
Status
Task Force
EIAC Org Set
Org Unit
25-Jun-2019
Published
External
EIAC Org Set
Org Unit
25-Jun-2019
Published
EIAC (DAC)
EIAC Org Set
Org Unit
25-Jun-2019
Published

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
Parent	Empty – The object has no associated parent Not-Empty – The object has an associated parent
Identifier	Empty – The object does not have a unique identifier Not-Empty – The object has a unique identifier
Description	Empty – The object has no written description Not-Empty – The object has a written description
Documents	Empty – The object has no associated documents Not-Empty – The object has at least one associated document
Types	Org Unit Role Asset Resources
Subtype	Empty – The object does not have a business type associated Not-Empty – The object has at least one business type associated
Categories	Empty – The object has no category associated Not-Empty – The object has at least one associated category
Last Modify By	Textual search of last resource who last modified an object
Modified Date	The date the item has been last modified
Status	Shows the status of the item in question (published vs in-progress) Sent for Approval Approved Rejected Sent for Endorsement Revised
Locked	False – The object isn't locked True – The object is locked

The Filtering section will cover the following:

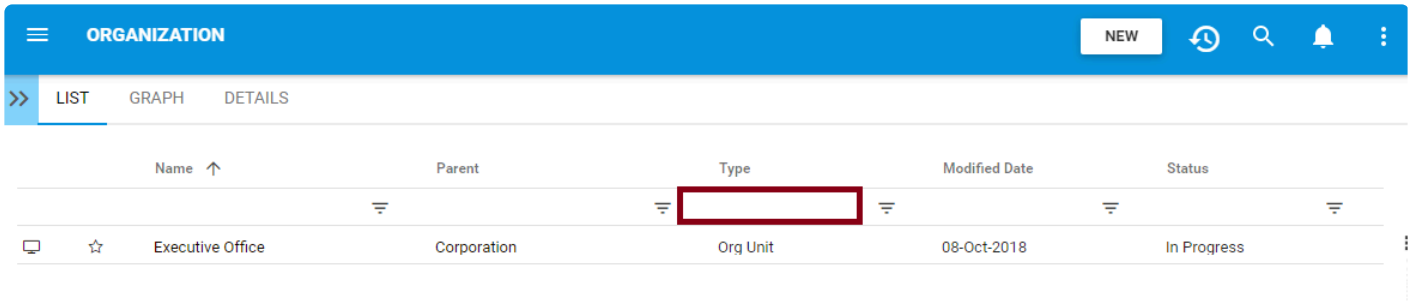
1. How to Add Filters
2. How to Remove Filters
3. How to Combine Filters

4.6.2.2.1 Add Filter

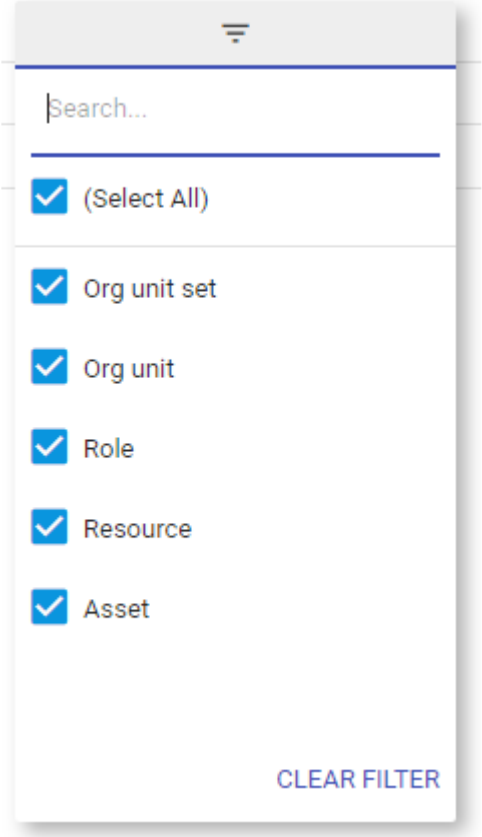
You can add filters to see organization units and other specific objects of your choice. **Type** what you are looking for, **select** the filter in the drop-down menu, or **define the range of dates**.

How to Add Filter

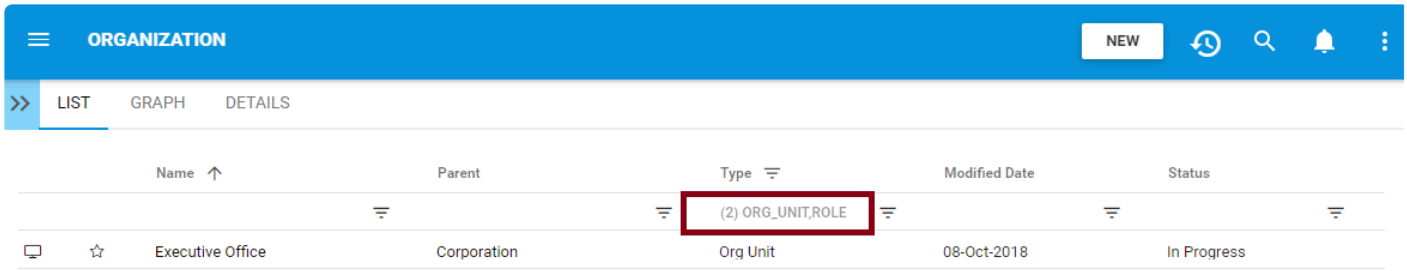
1. Navigate cursor and select the box column you wish to filter. For this example, we will use **Type**.



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



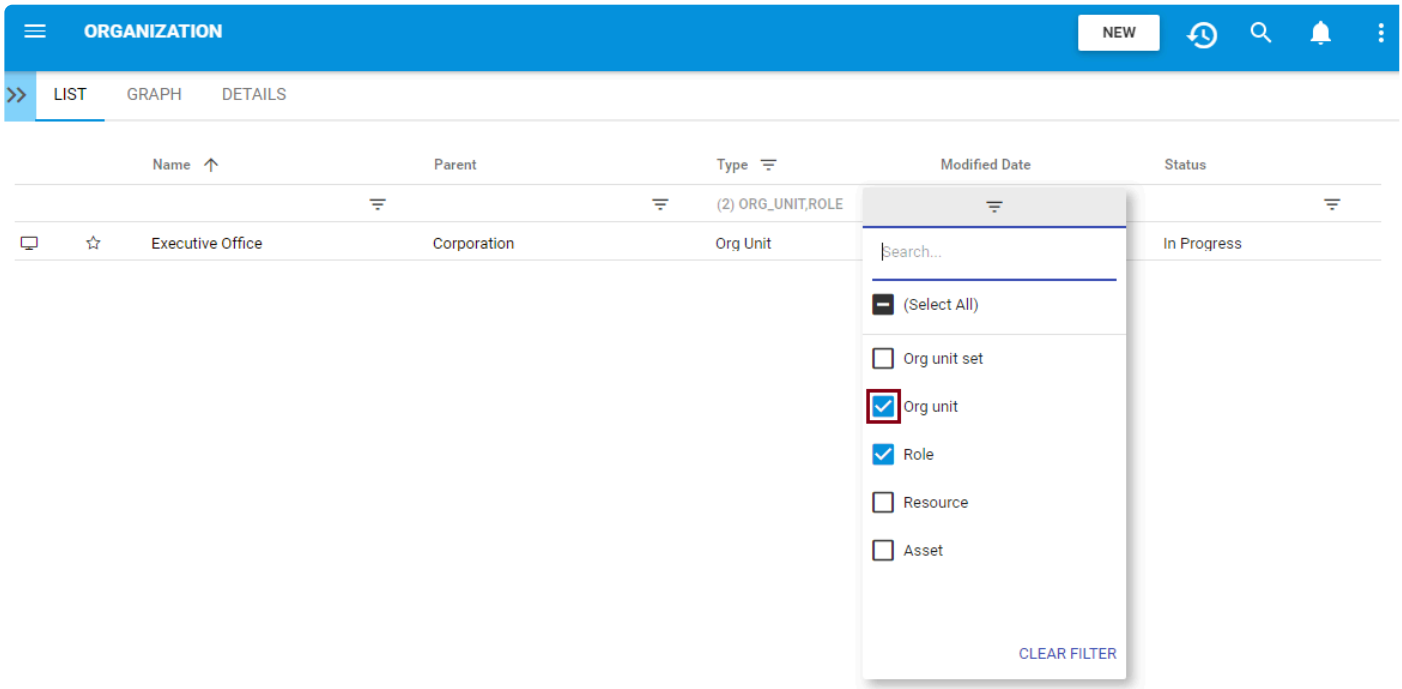
3. Select the desired filter. For this example, we will select **Org Unit** and **Role**.


ORGANIZATION
NEW
LIST
GRAPH
DETAILS
Name
Parent
Type
Modified Date
Status
(2) ORG_UNIT,ROLE
Executive Office
Corporation
Org Unit
08-Oct-2018
In Progress

4.6.2.2.2 Remove Filter

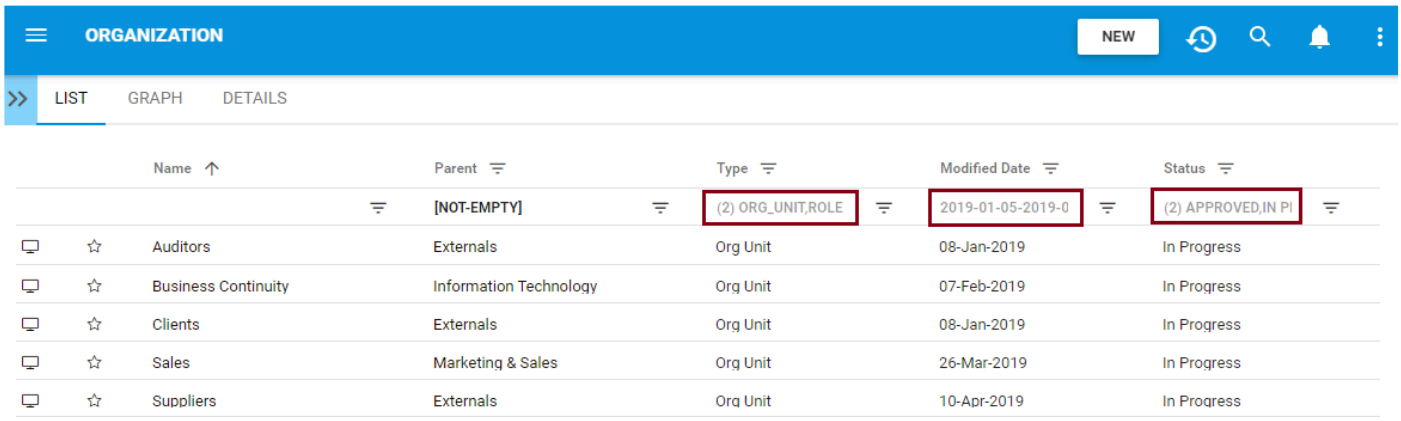
You can remove filters; this will naturally increase the results in your list.

Click on the button beside the filter name.



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

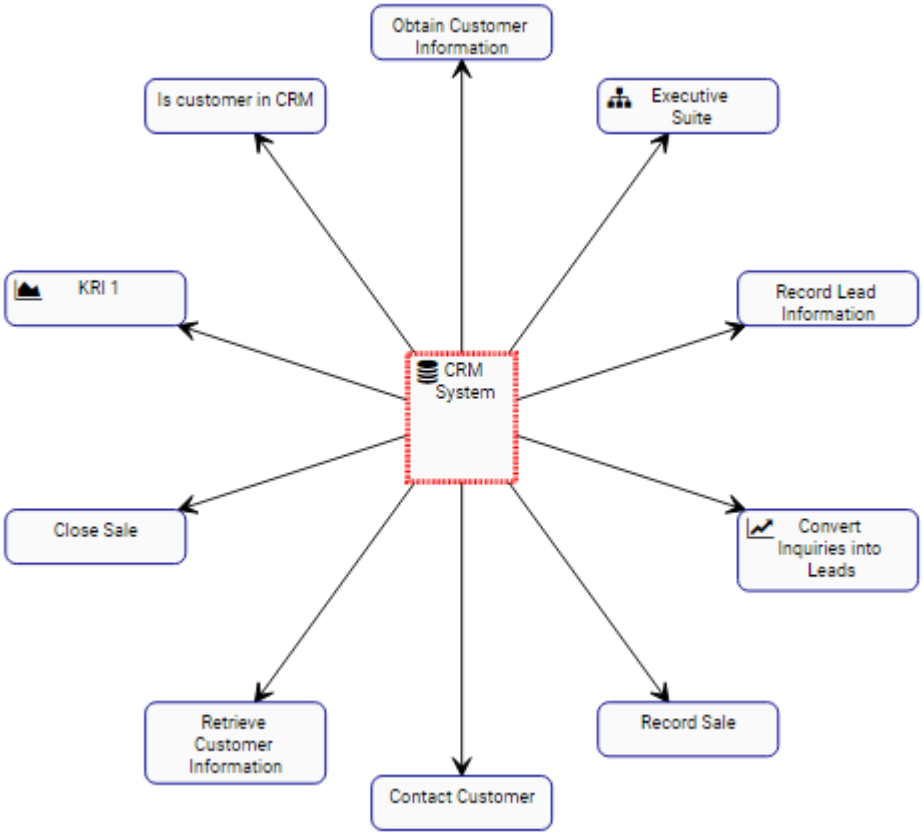
Quick Graph View is a feature of the EPC Web App that allows users to immediately view a graph associated with an Organizational item. While Graph's will be further explained below, the Quick Graph View allows users to quickly navigate to a Graph from "List View".

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.

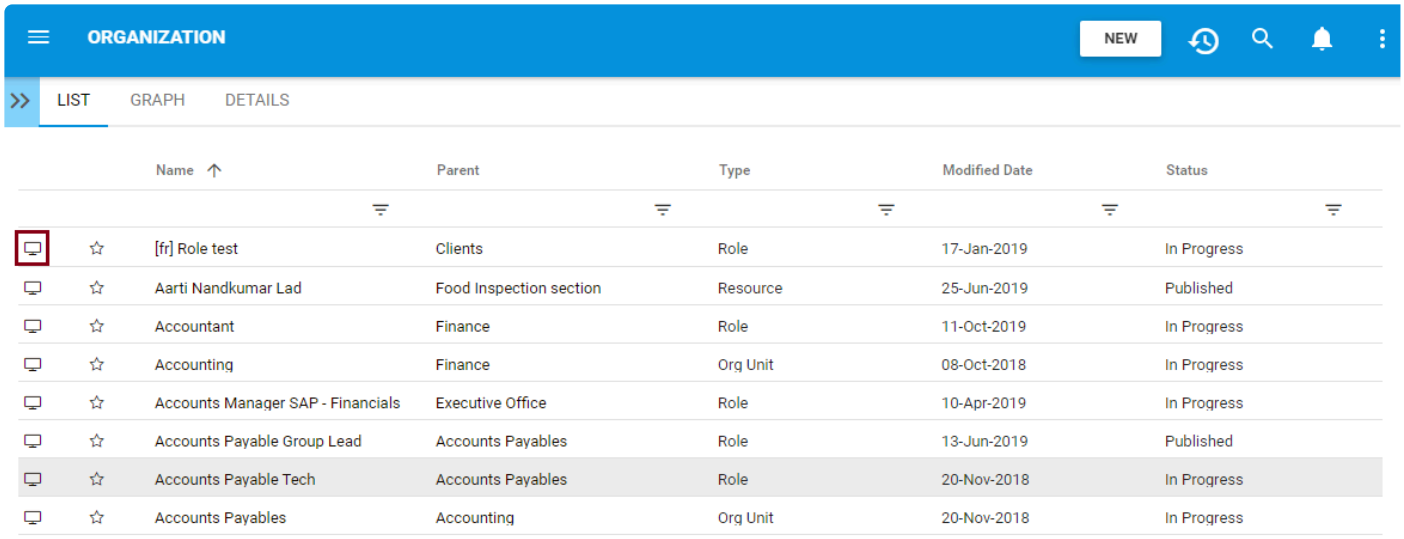
How to navigate to the Graph section (Manual Navigation)

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.

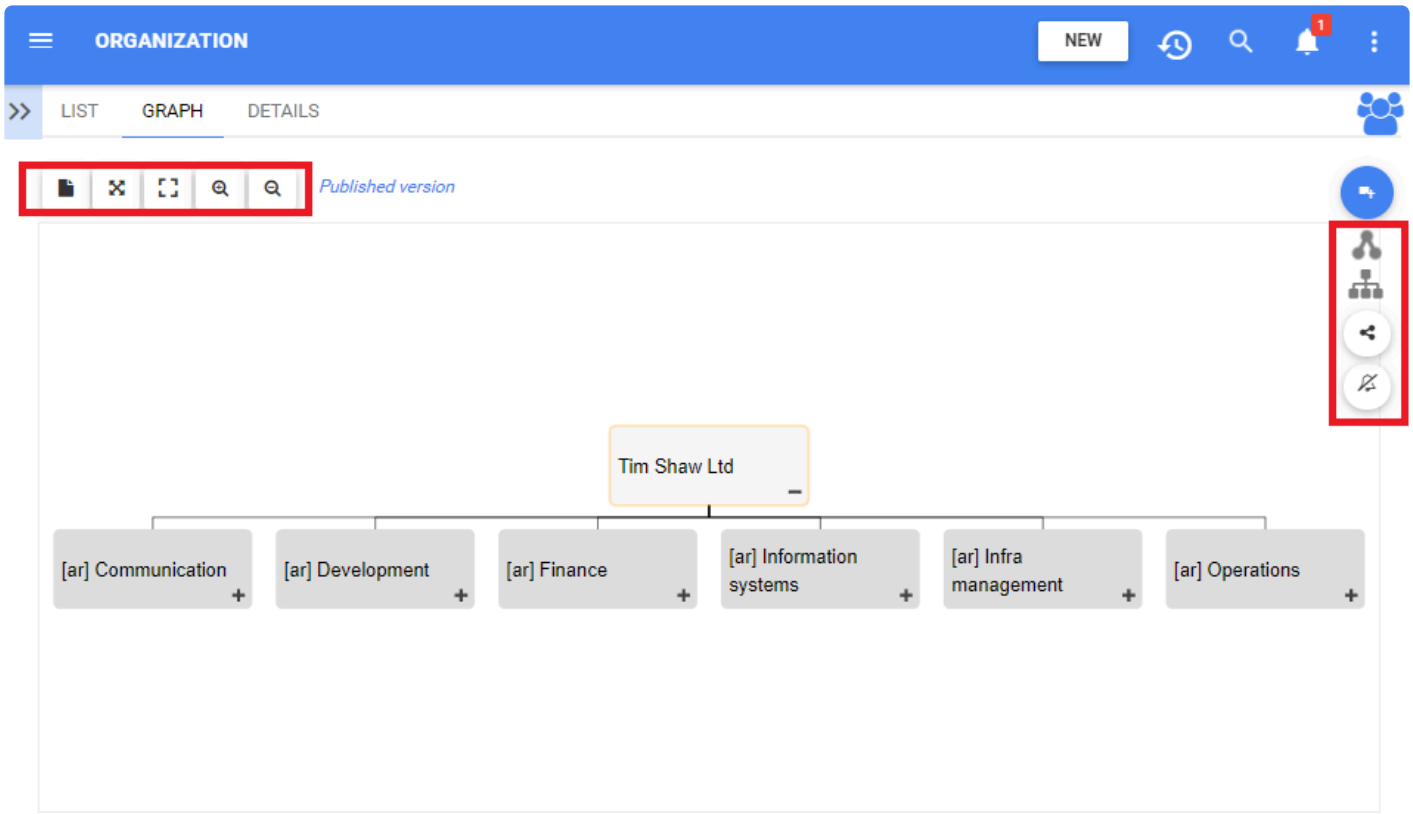
4. Select any item on the list by clicking on the graph icon of the desired item



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
Object Process		SOP process book generation
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

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
Share		Copies URL to user's clipboard to share
Settings		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 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.

4.6.3.1.1.2 Fit Screen

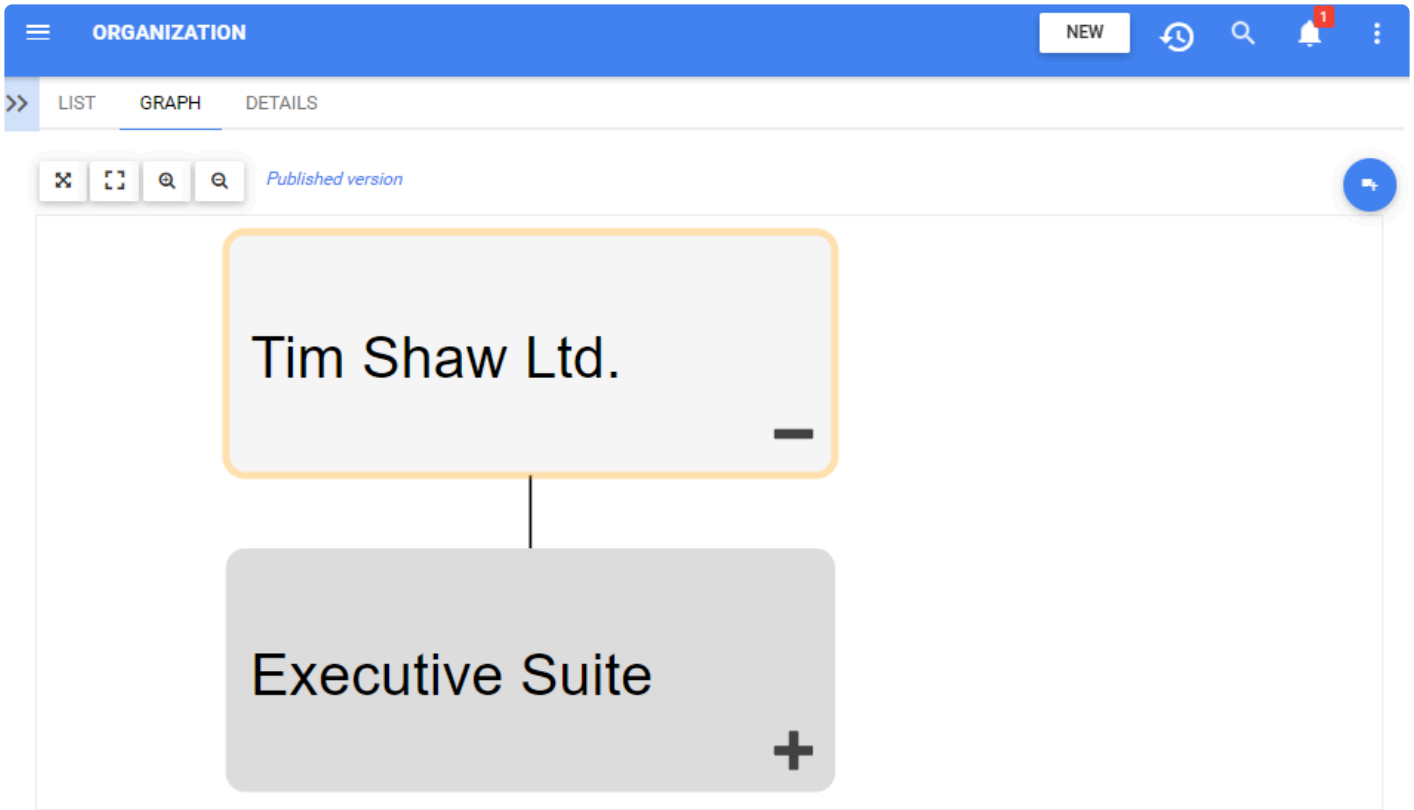
The fit screen function has been implemented to assist users at replacing and re-centering the window.

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

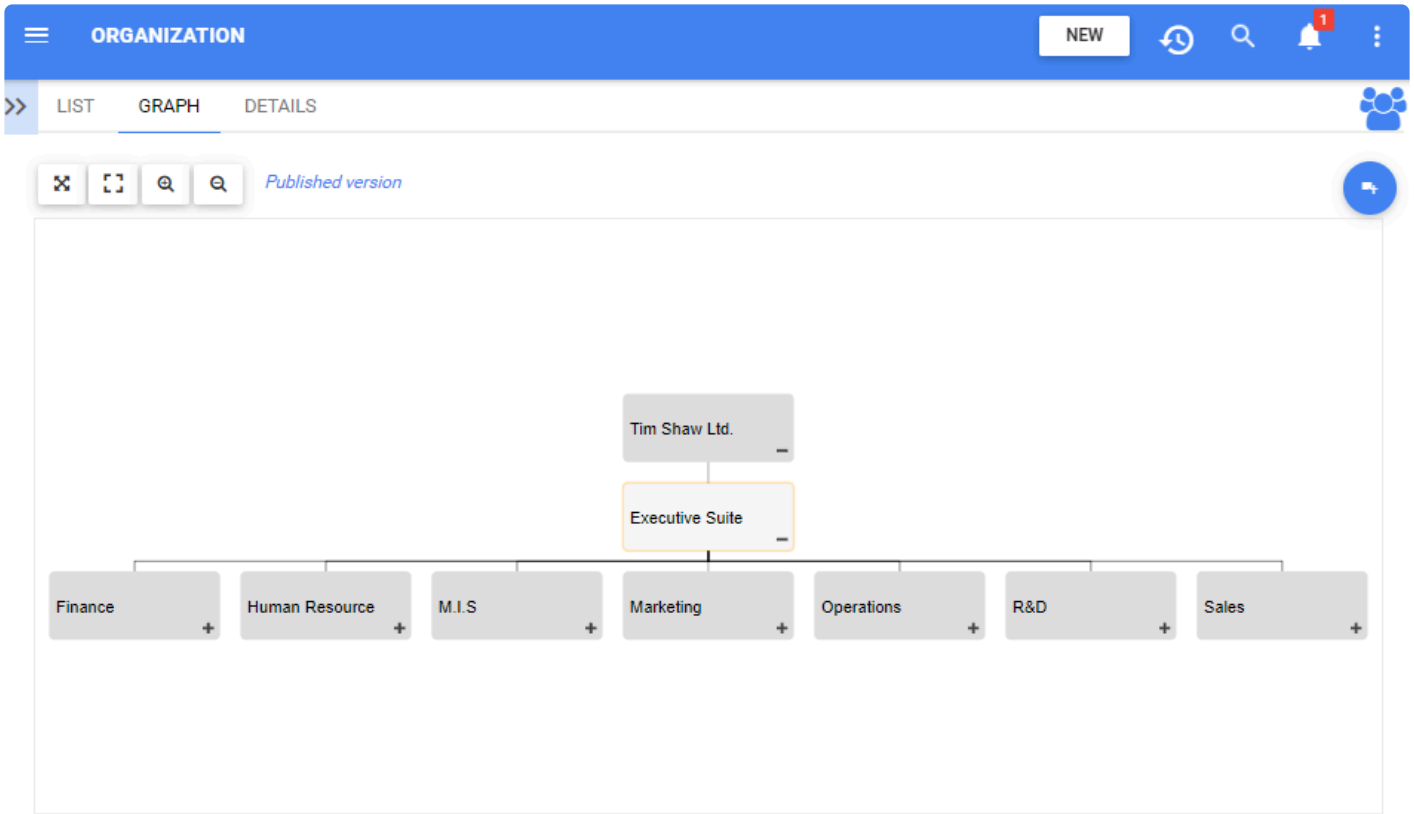
1. Navigate to an Org Unit within the Organization Module

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


ORGANIZATION
NEW
1
LIST
GRAPH
DETAILS
Published version
Tim Shaw Ltd.
Executive Suite
Finance
Human Resource
M.I.S
Marketing
Operations
R&D
Sales

4.6.3.1.1.3 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

Tim Shaw Ltd.
Executive Suite
Finance
Human Resource
M.I.S
Marketing
Operations
R&D
Sales

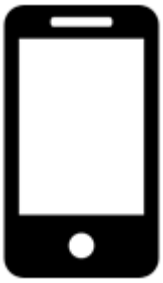
4.6.3.1.1.4 Zoom In

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.

4.6.3.1.1.5 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

Coming Soon

4.6.3.1.1.7 Settings

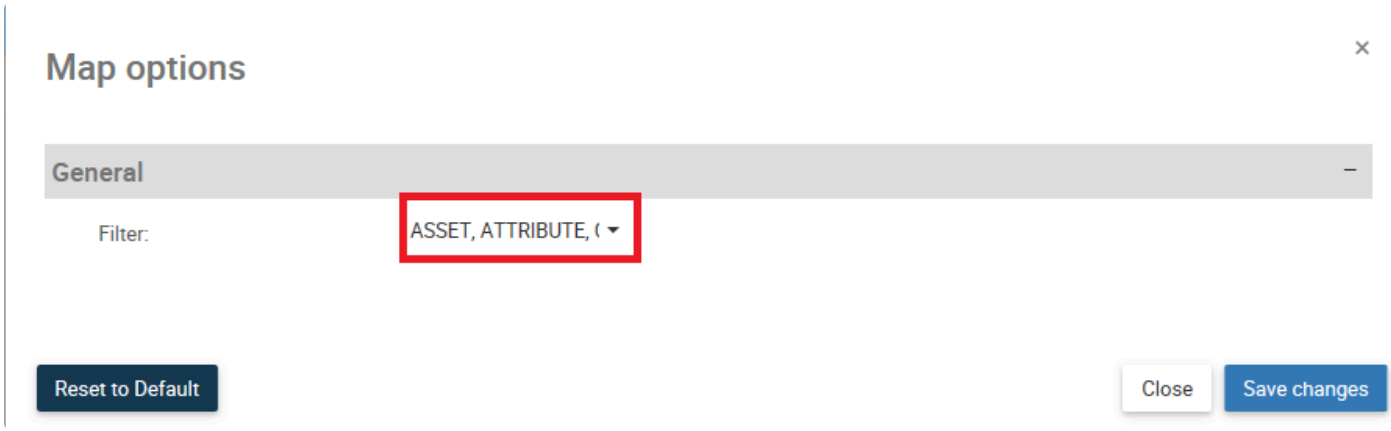
The Settings button has been added to allow users to customize the Graphs they view. Customization allows users to select exactly what is displayed in each graph, allowing them to prioritize key information in a format of their choice.

This section will cover navigation to the settings button.

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

1. Select “Settings” icon

2. Navigate cursor to “Asset, Attribute”



3. The drop-down menu will be generated

4. Select the desired filter and select “Save Changes”.

4.6.3.1.1.8 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.

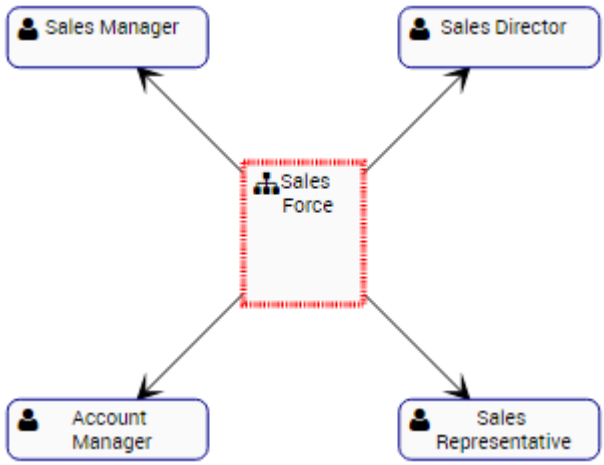
To use the Subscribe button, please see the following instructions.

1. 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.

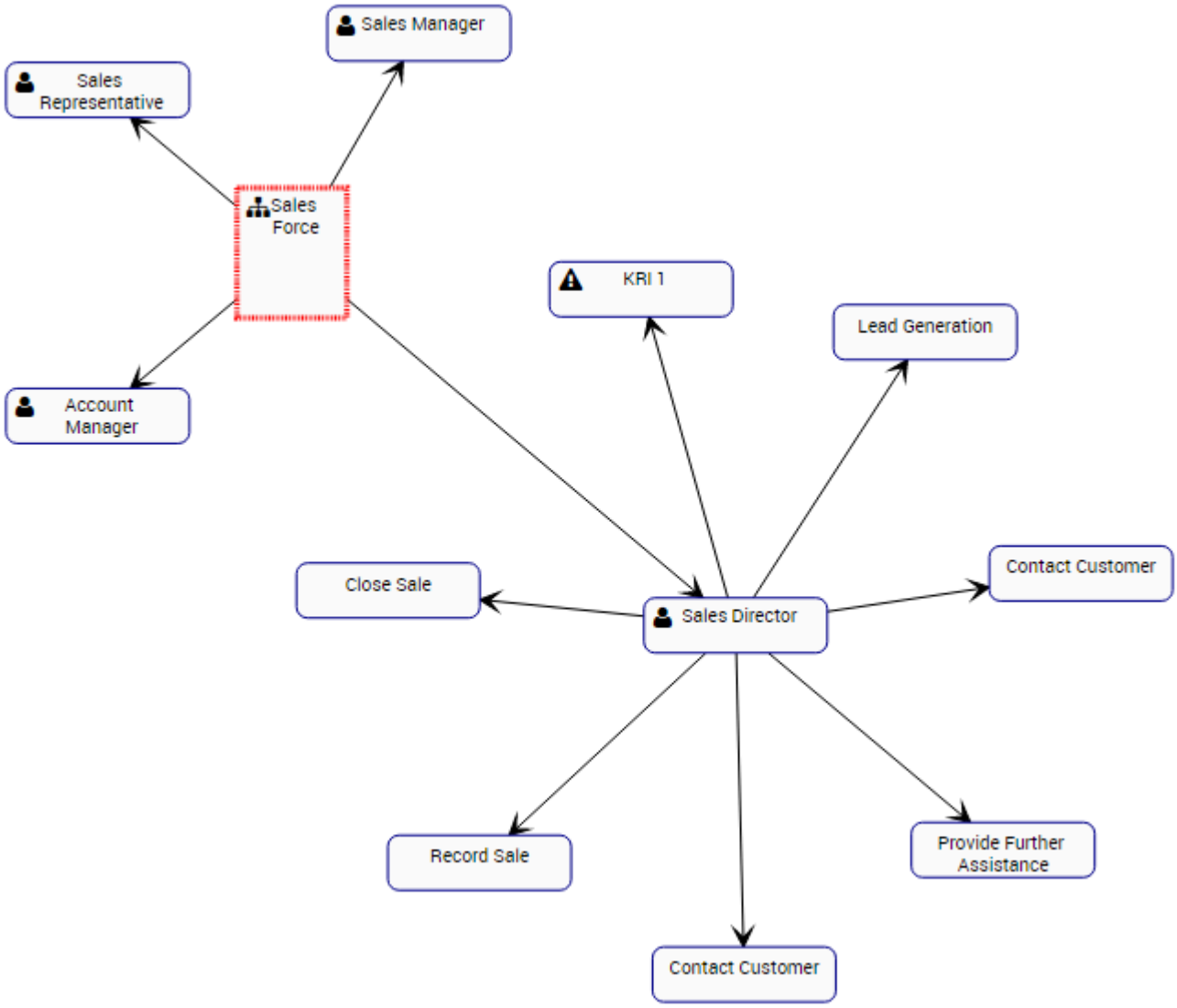
Impact Graph



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.

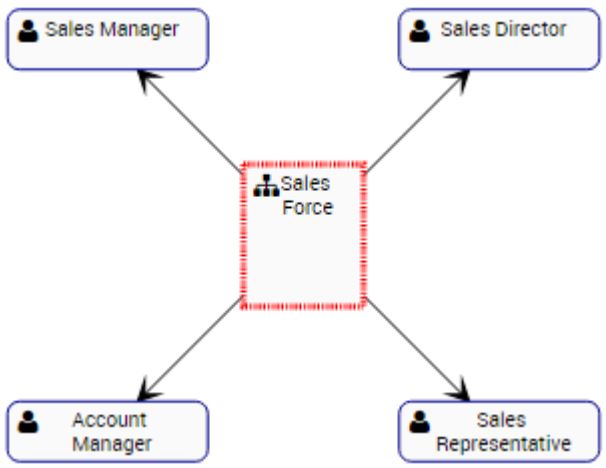
Impact Graph Navigation

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

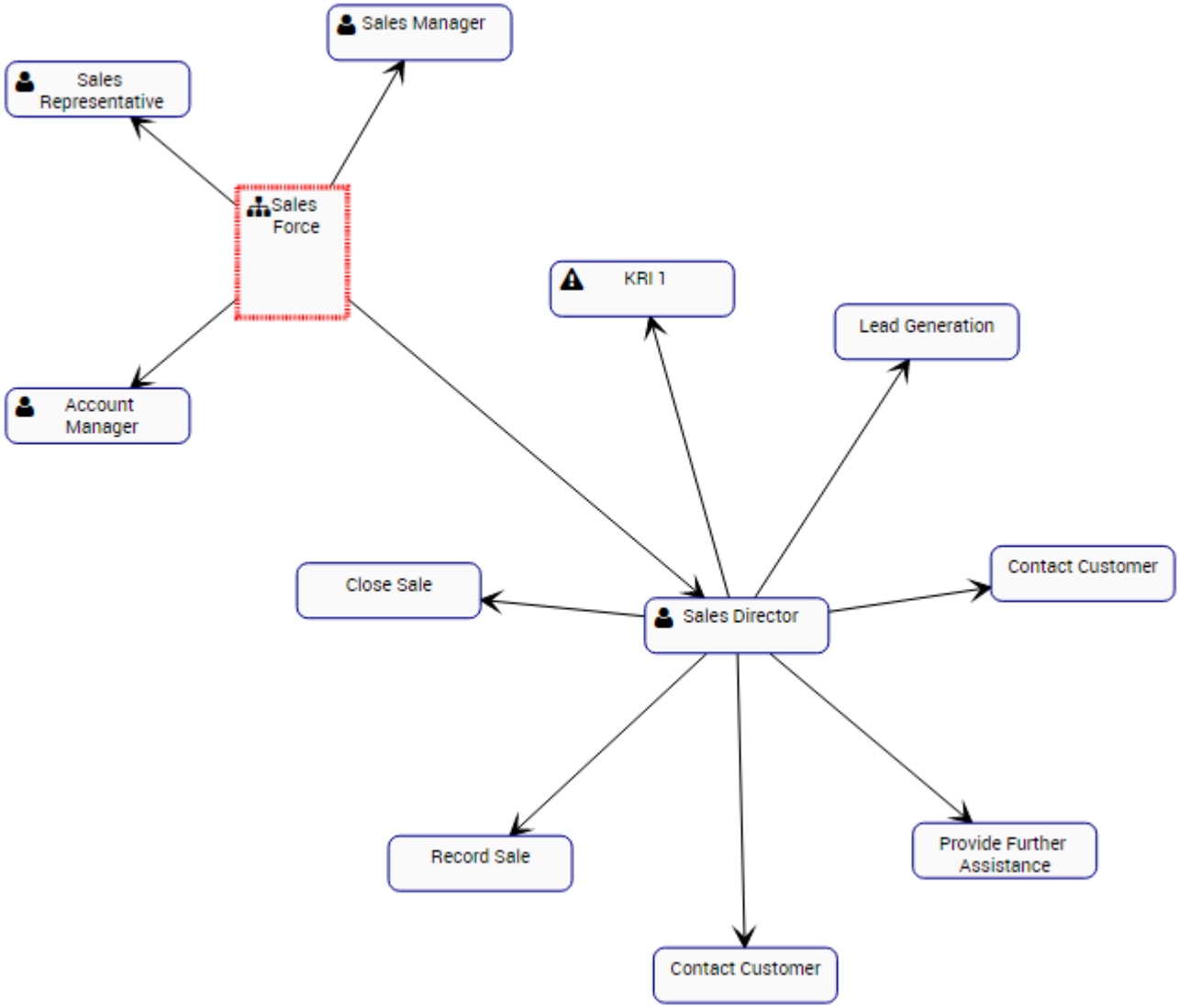
2. Click on the “Quick Graph View” icon

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



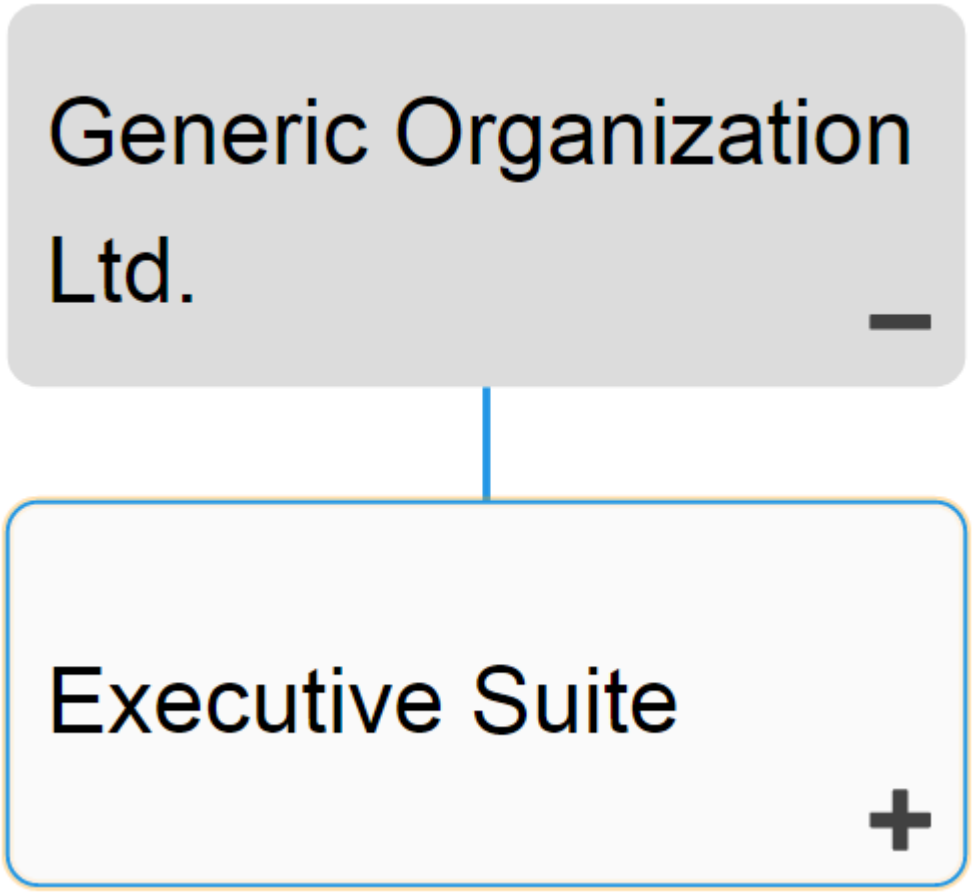
5. (Optional) To further expand the Impact Graph, simply double-click on the item to which you would like to display



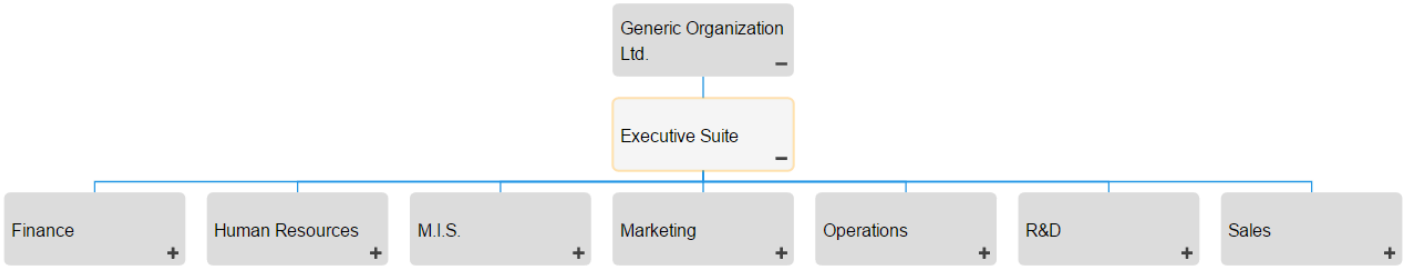
4.6.3.3 Hierarchy Graph

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.

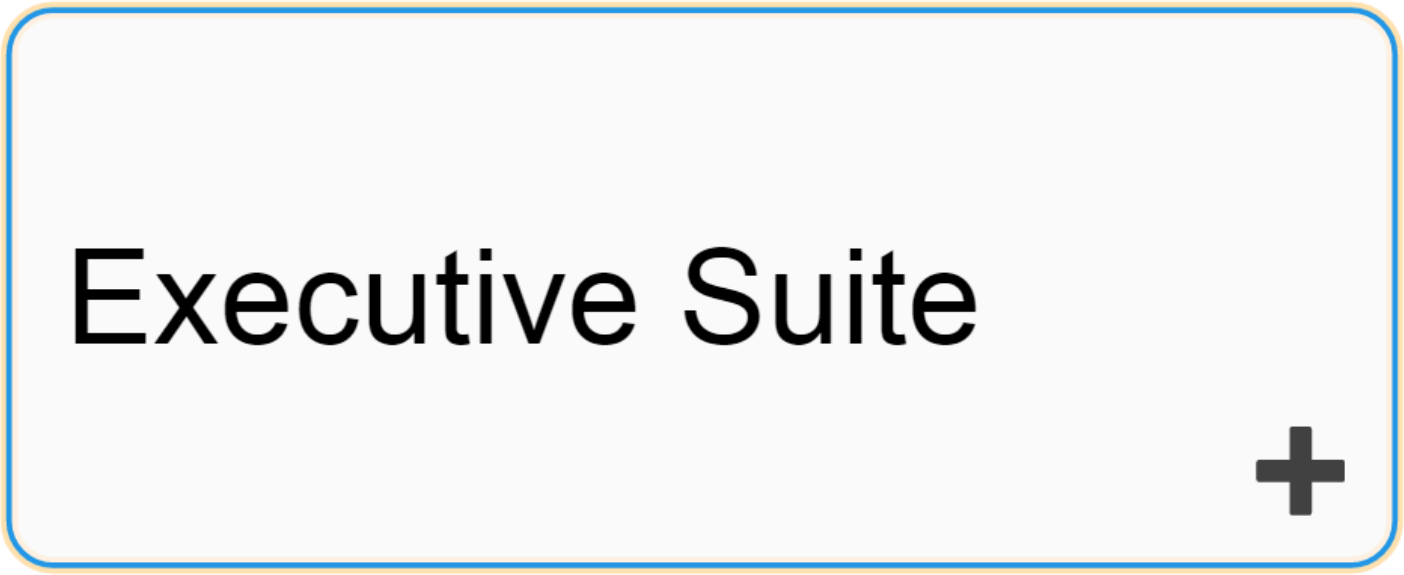
1. Navigate to Organization

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

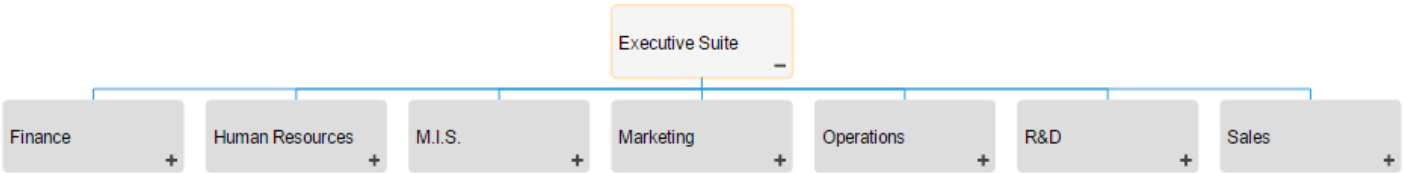
> The further you navigate, the more you limit the scope of Hierarchy Graphs. To view a complete picture of organizational structure, select items listed as “Org Units” in List View

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.

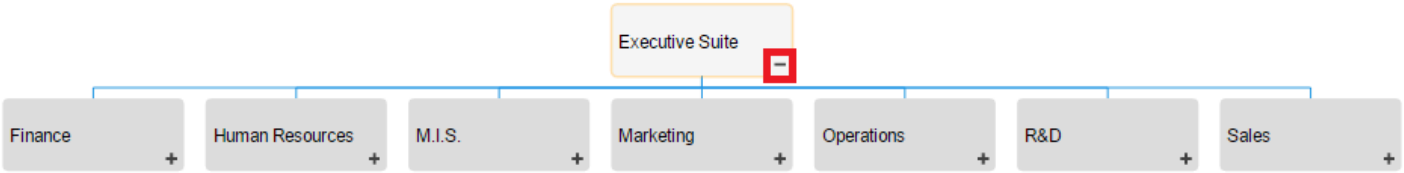


5. To further expand components of the Hierarchy Graph, double click on the on the objects in the Graph. This will expand the item selected.



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

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


Executive Suite
Finance
Human Resources
M.I.S.
Marketing
Operations
R&D
Sales

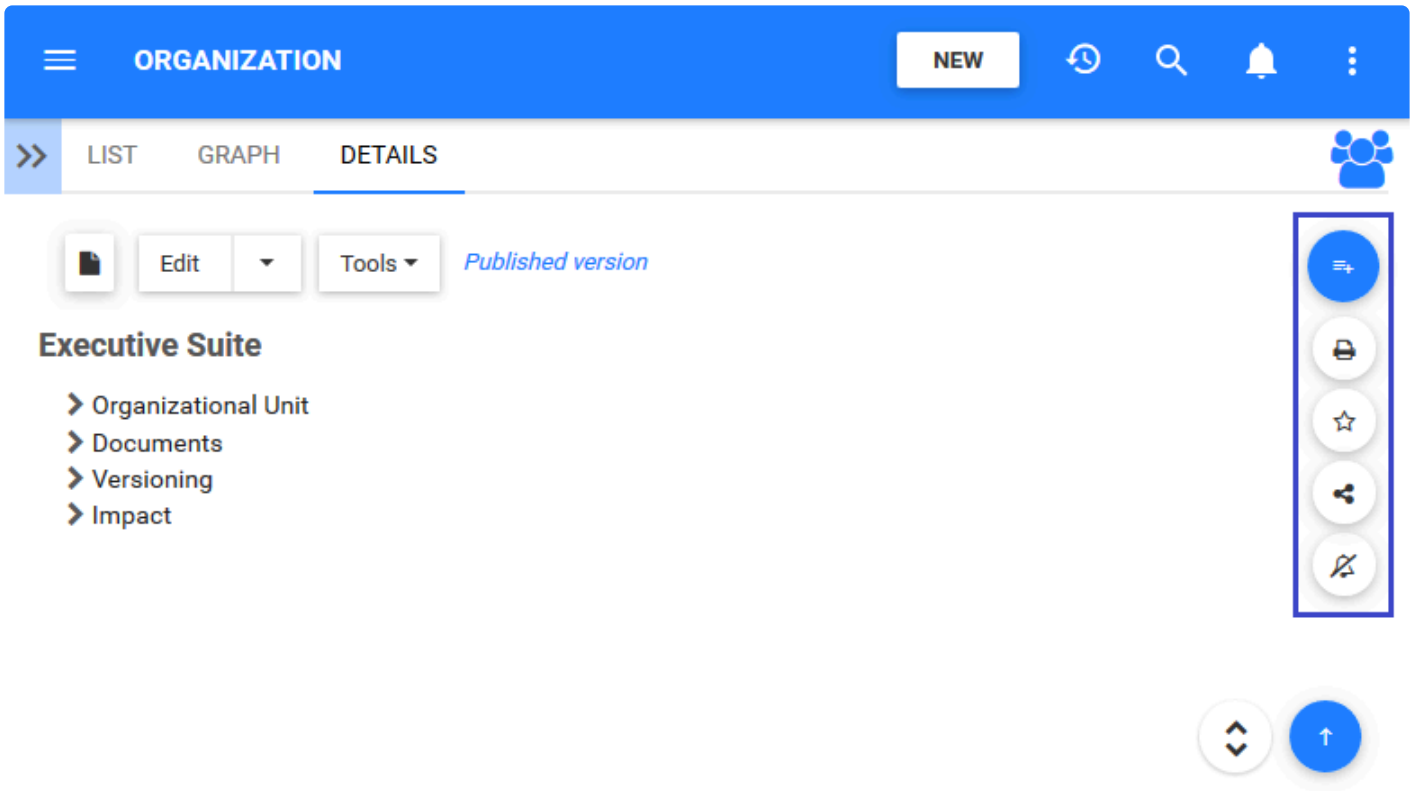
4.6.4 Details

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.



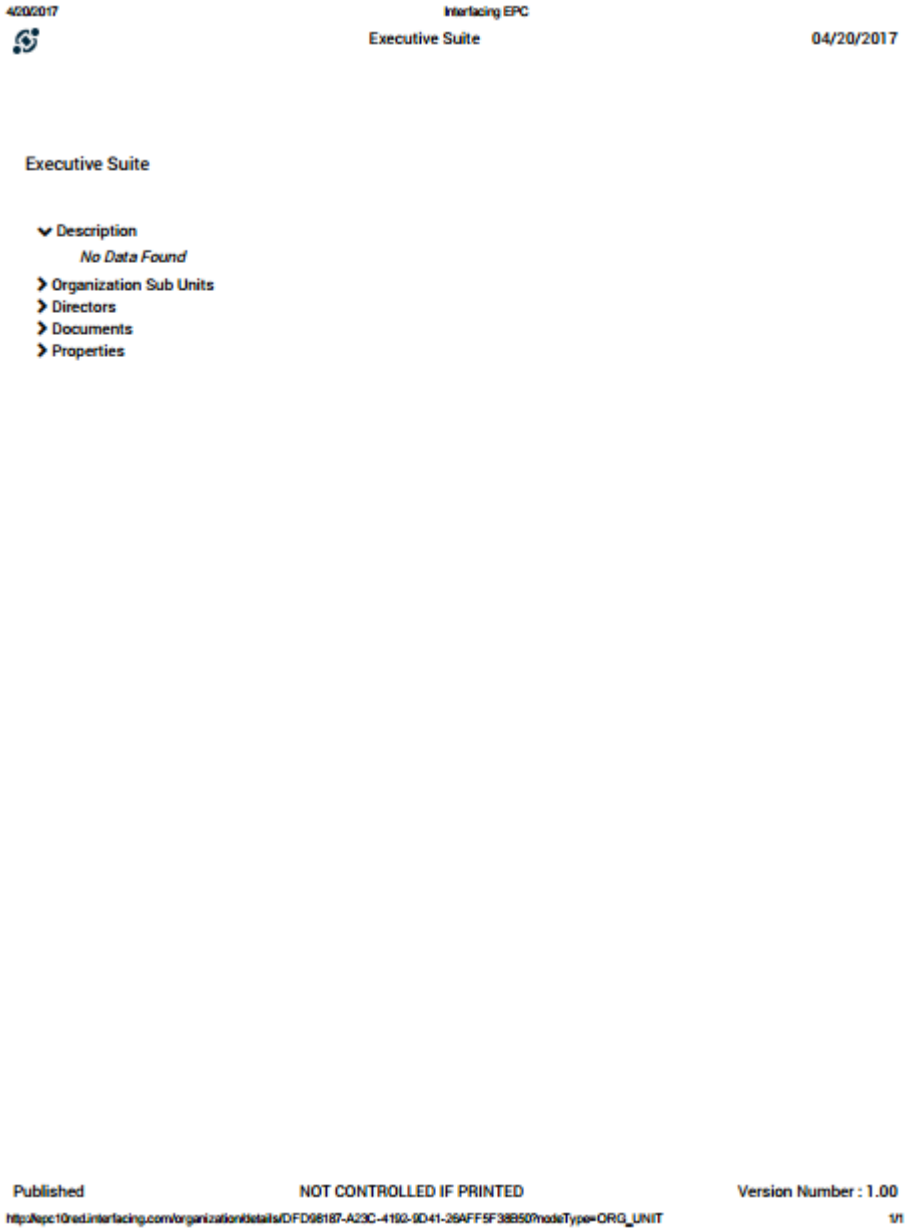
4.6.4.1.1 Toolbar

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
Favorite		Allows users to sort by favorites in the “My Actions” widget
Share		Copies URL to user’s clipboard to share
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.



4.6.4.1.1.4 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 .

4.6.4.2 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

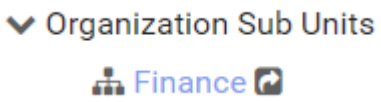
4.6.4.2.1 Description

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.

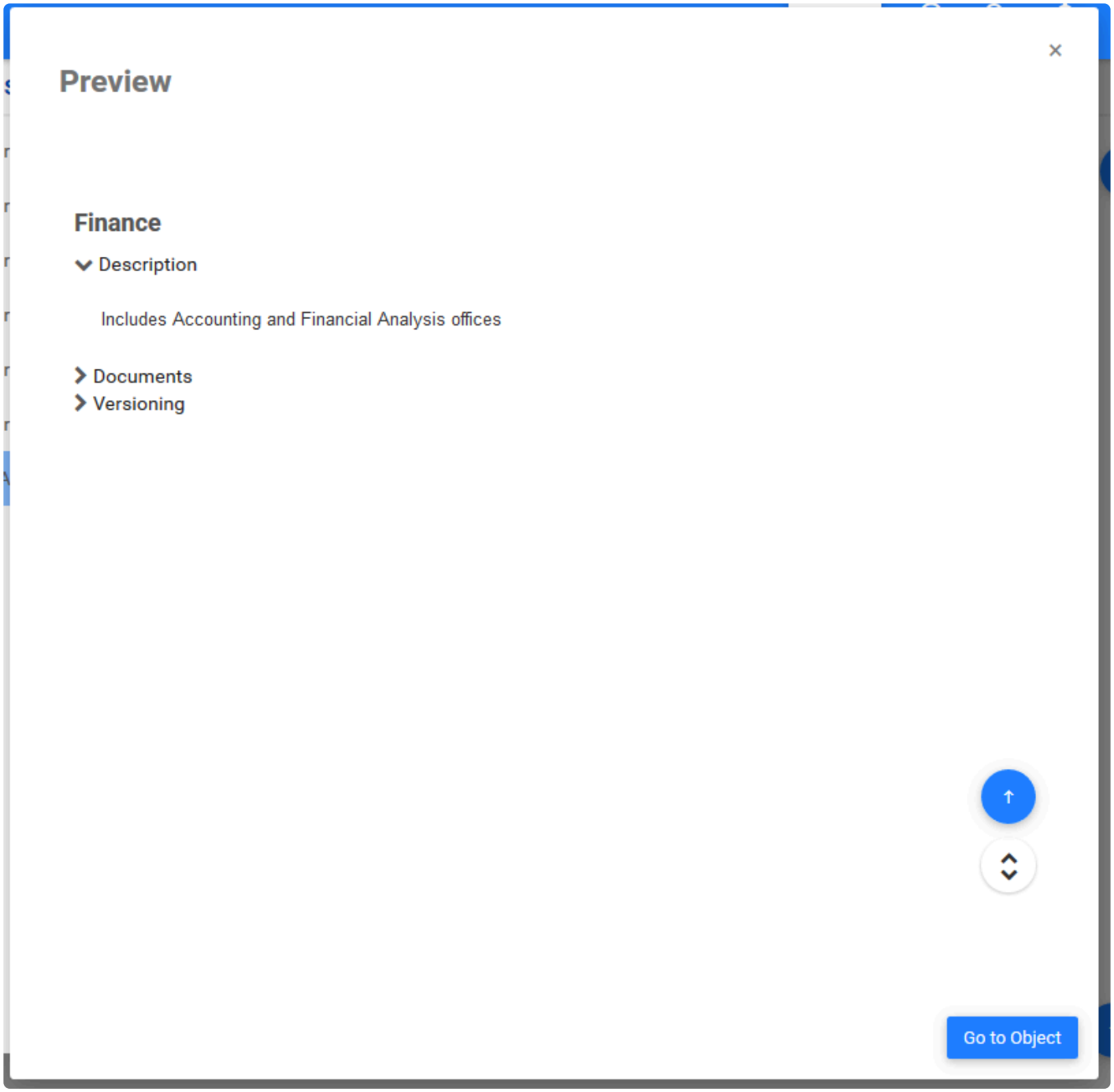
4.6.4.2.2 Organization Sub Units

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.

To navigate directly to the object, click on the icon.



Users can click on the object's name to view its details in a popup. To navigate to the object's detail page, click on **Go To Object**


Preview
Finance
Description
Includes Accounting and Financial Analysis offices
Documents
Versioning
Go to Object

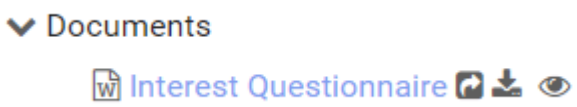
4.6.4.2.3 Directors

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 at the ability to directly access these documents. Users are additionally provided details regarding the document type (docx, pptx, URL, xlxs, etc.)

To navigate directly to the object, click on the icon.



Users can preview or download the document:

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

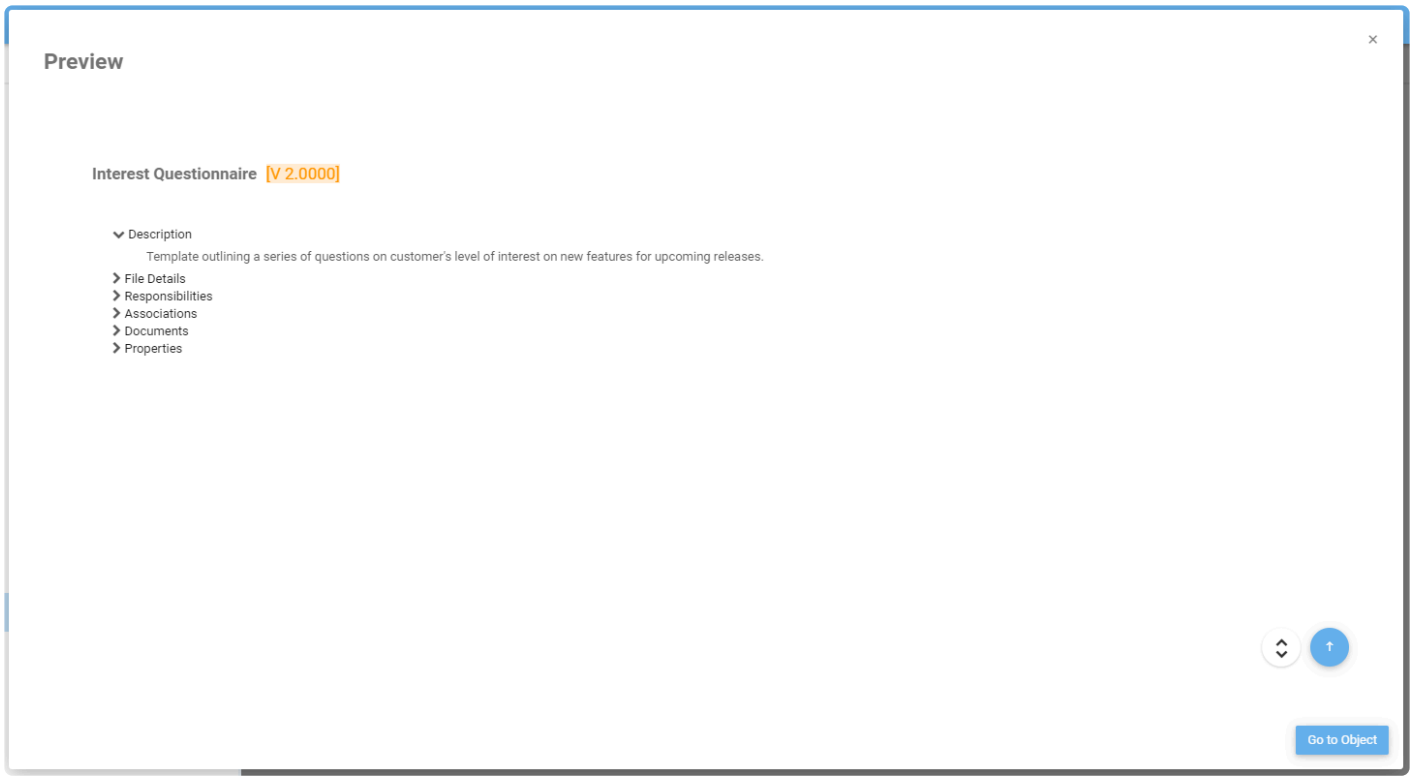
2. Download: To download the document click on the icon

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

Users can click on the document's name to view its details in a popup. To navigate to the document's detail page, click on **Go To Object**



4.6.4.2.5 Versioning

The Versioning section provides users with additional key information about items. This section is broken down into 3 categories:

1.**Current Version**: Provides information about what version is being viewed, and when the latest modification has been made
2.**Version History**: Provides information on previous versions of the Org object. Includes major and minor versions, status, author and date.
3.**Analysis**: Provides information that better allows users to analyze items and related key details.

Current Version

Version Number: 0.0007

Last Modified: a month ago

Version History

Version Number	Status	Author	Date
0.0007	In Progress	Dia Apostolakis (Dia)	February 13, 2019 2:31 PM
0.0006	In Progress	Dia Apostolakis (Dia)	February 13, 2019 2:30 PM
0.0005	In Progress	scott Armstrong (Scott)	December 14, 2018 12:25 PM
0.0004	In Progress	scott Armstrong (Scott)	December 14, 2018 12:25 PM
0.0003	In Progress	scott Armstrong (Scott)	December 14, 2018 12:25 PM
0.0002	In Progress	scott Armstrong (Scott)	December 14, 2018 12:24 PM
0.0001	In Progress	scott Armstrong (Scott)	December 13, 2018 8:47 AM

Analysis

FREQUENCY	Yearly

4.6.4.2.6 Impacts

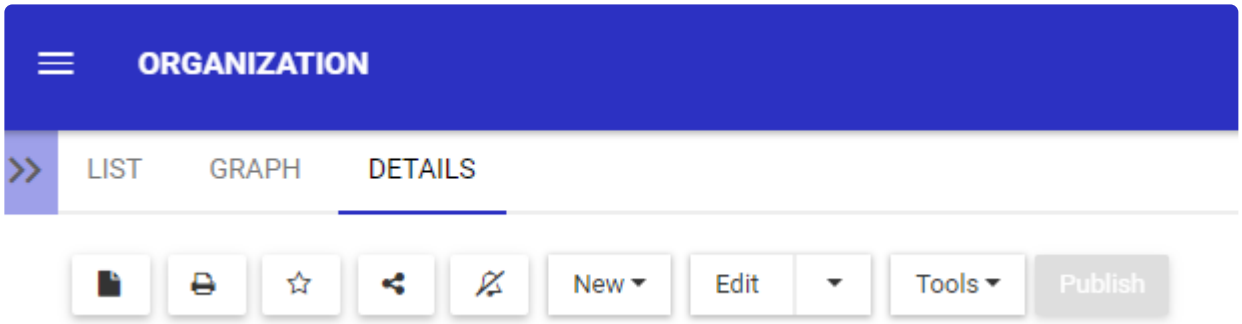
Users are able to view the impacts an object has on others in a list form in the Details view of any object. It is a complement to the Impact Graph, and another way of visualizing impact data.

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 to an object. Impacts 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.

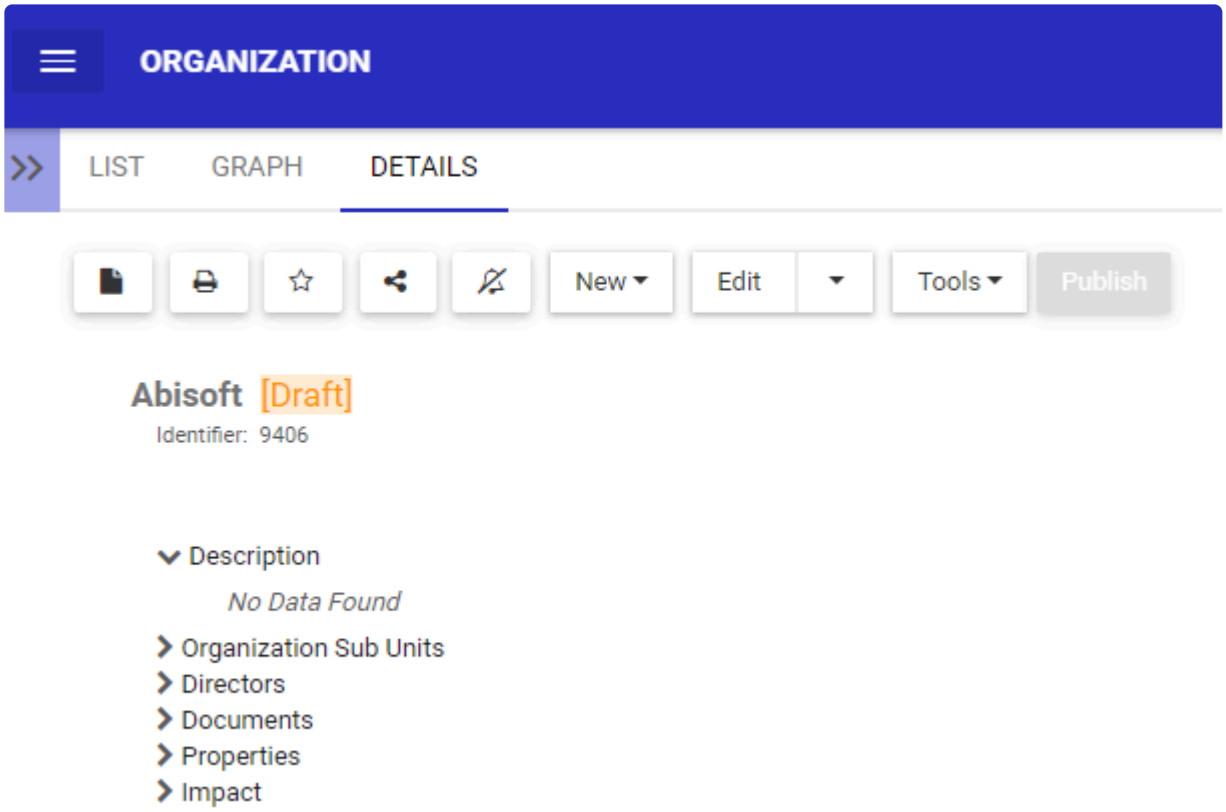
> The impact list will only show **direct** impacts, as opposed to the impact graph, which can be expanded to show **indirect** impacts on an object

Navigating to the Impact List

1. Navigate to any Detail page of any object in EPC



2. At the bottom of the Details page, click on Impact to expand the section



3. All direct impacts associated to the EPC Object will be listed.

> To sort a column by alphabetical order, click on it's header. The arrow pointing up indicates sorting in **Ascending Order**, the arrow pointing down indicates sorting in **Descending Order**, and no arrow indicates **No Sorting**.

Object Name A	Parent B	Object Type C	Assignment Type D	Justification E	Impact Type F	Status G
[Default Template] Analysis (A4 - Lands...	Default template folder	Document	Directly Impacts		Association	Published
Document should be reviewed every yea...	Import Folder	Rule	Directly Impacts		Association	Published
Enforce a zero-tolerance policy for dang...	Import Folder	Control	Directly Impacts		Association	Published
Onboarding cost	Imported Objective	KPI	Directly Impacts		Association	Published
Ratio of candidates to hires	Imported Objective	KPI	Directly Impacts		Association	Published
Risk B - with risk analysis!	Import Folder	Risk	Directly Impacts		Association	Published
Warehouse	Imported Measure Set	Objective	Directly Impacts		Association	Published

A	Object Name	The Name of the object. Click on the hyperlink to go to the object
B	Parent	The Parent of the object
C	Object Type	The type of the object
D	Assignment Type	The relationship type between the two objects
E	Justification	The justification of the object

F	Impact Type	How does this object impact the current object
G	Status	The status of the object (In Progress or Published)

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.

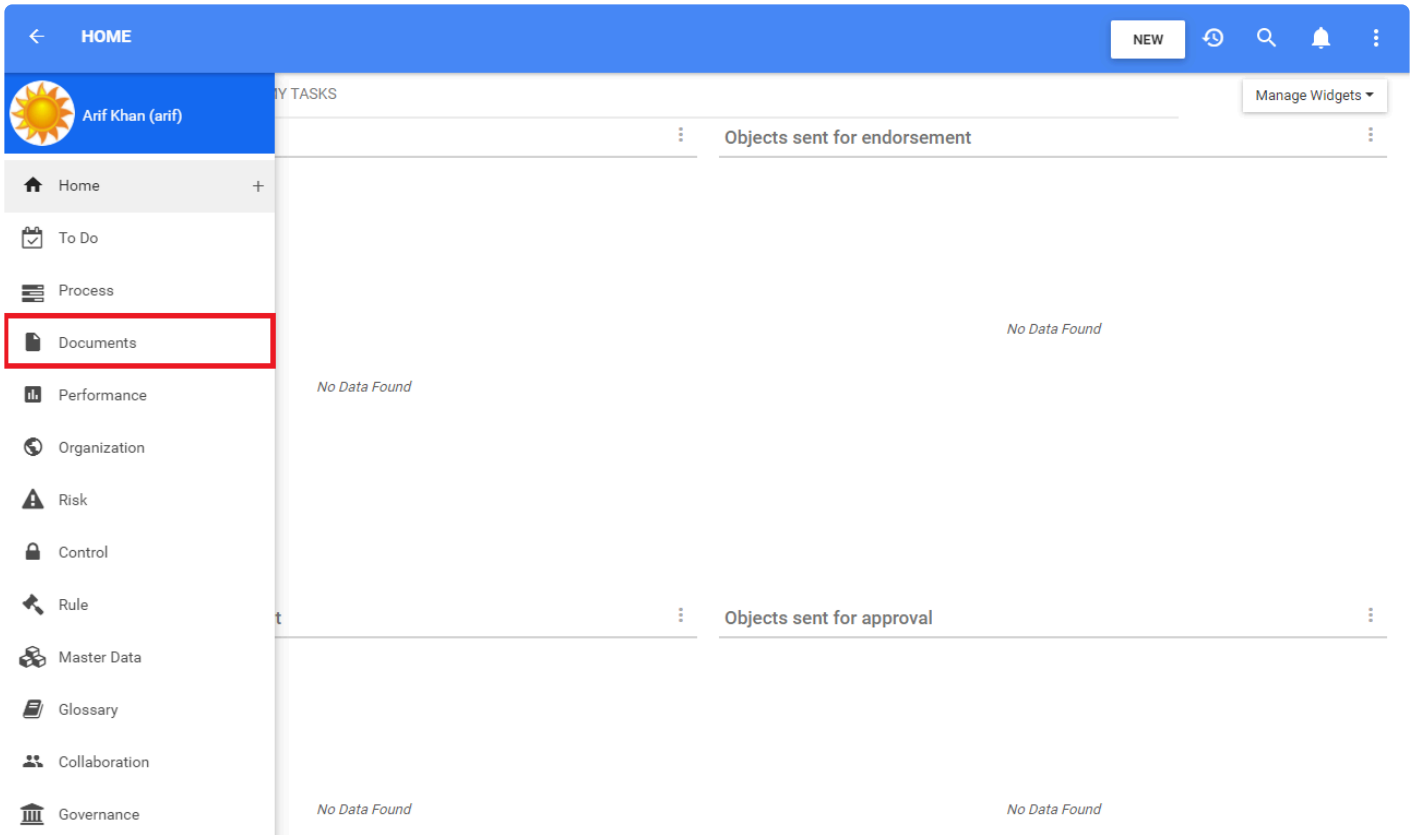
Dimension	Details
1. List	Provides view of all documents that you have access to
2. Graph	Provides the visual representation of the hierarchy of documents, their features and links (Impact and Hierarchy Graphs)
3. Details	Provides additional key information regarding specific documents

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. No hierarchy filter	A list view where **all** items within the given module are listed
2. Current level & below	A list view where **all levels below** the selected item are listed
3. Current level	A list view where **1-level level below** the selected item are listed

List Components

Component	Description
Download/ Preview	Allows users to download pr preview the file
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
Org Units	Whether or not there are Org Units directly associated with the item in question
Asset	Whether or not there are Assets inputted for the item in question
Documents	Whether or not there are Documents directly associated with the item in question
Subtype	Whether or not if this object is classified as a business type
Categories	Whether or not there are Categories directly associated with the item in question
Identifier	Textual search for any existing unique identifier of an object
Description	Whether or not there is a Description inputted for the item in question
Type	The type of the object
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.)

© 2020 Interfacing Technologies Corporation

Size	The size of the file in question
Last Modified By	The name of the last resource that modified the object
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)
Locked	Whether the item in question is currently locked or not

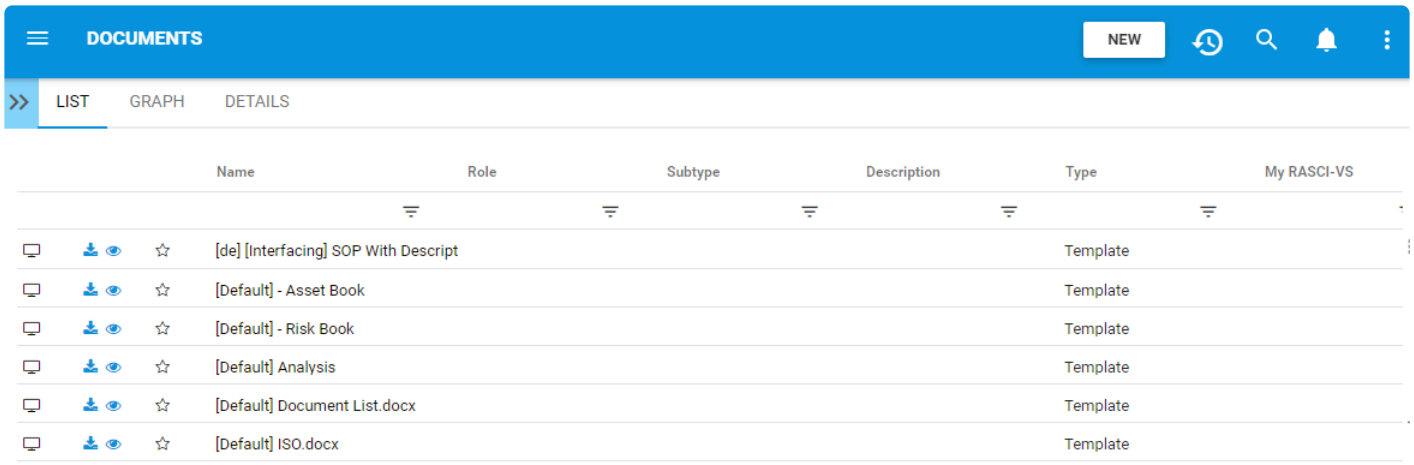
The number of columns displayed will be contingent on the user's screen resolution.

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

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

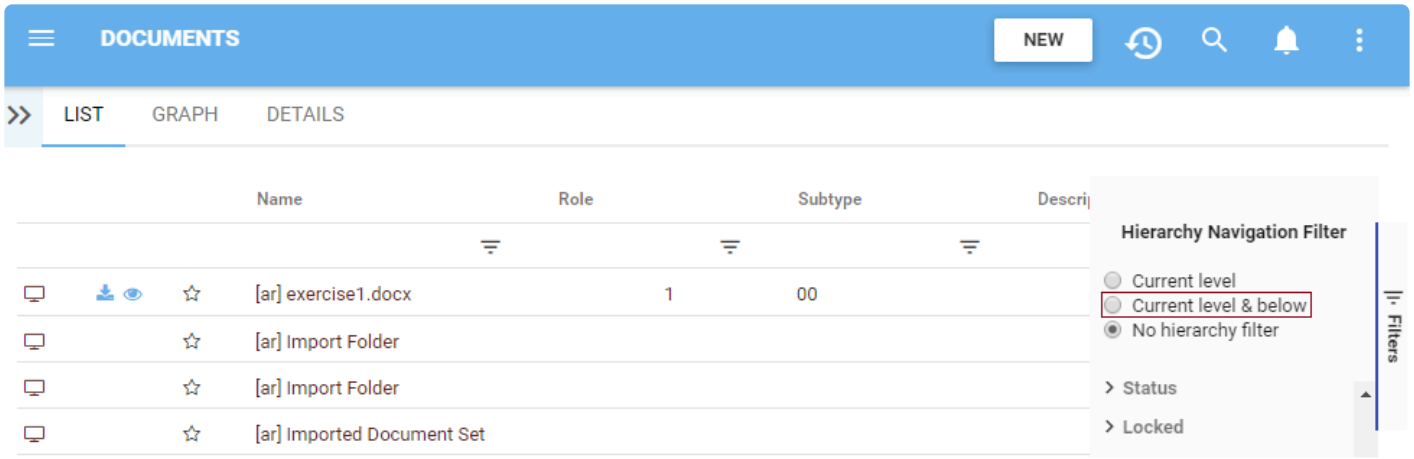
2. Click on **Documents**

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



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 filter panel and then select "Current level & below of the EPC Web App.



5. **(Optional)** Upon selecting the “Current level & below”, the EPC will automatically refresh the page p(banner tip). 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

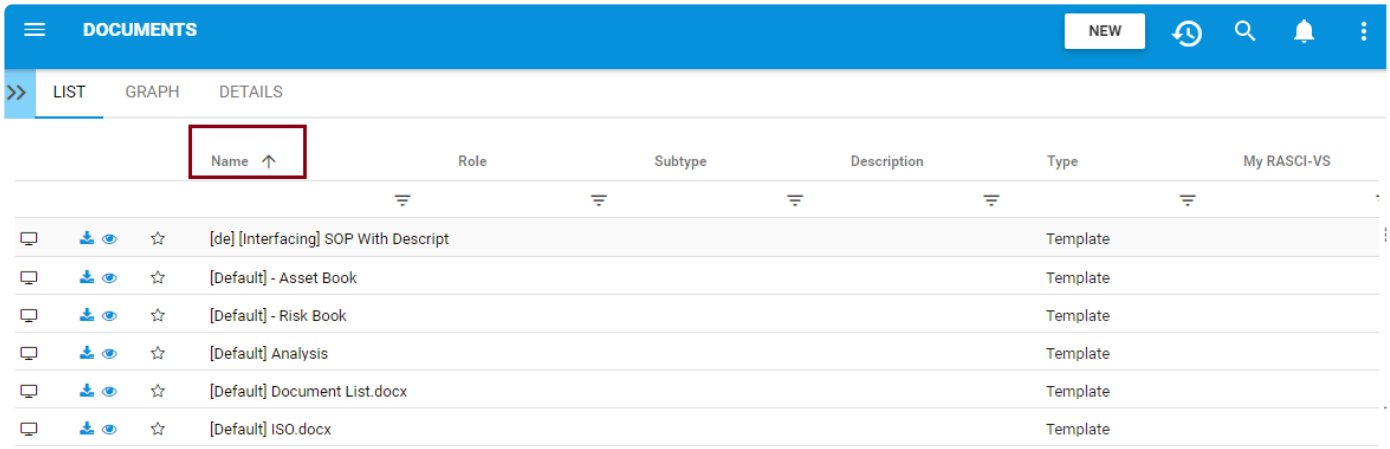
1. Navigate to the Documents Module

2. Navigate Cursor to desired **Category**

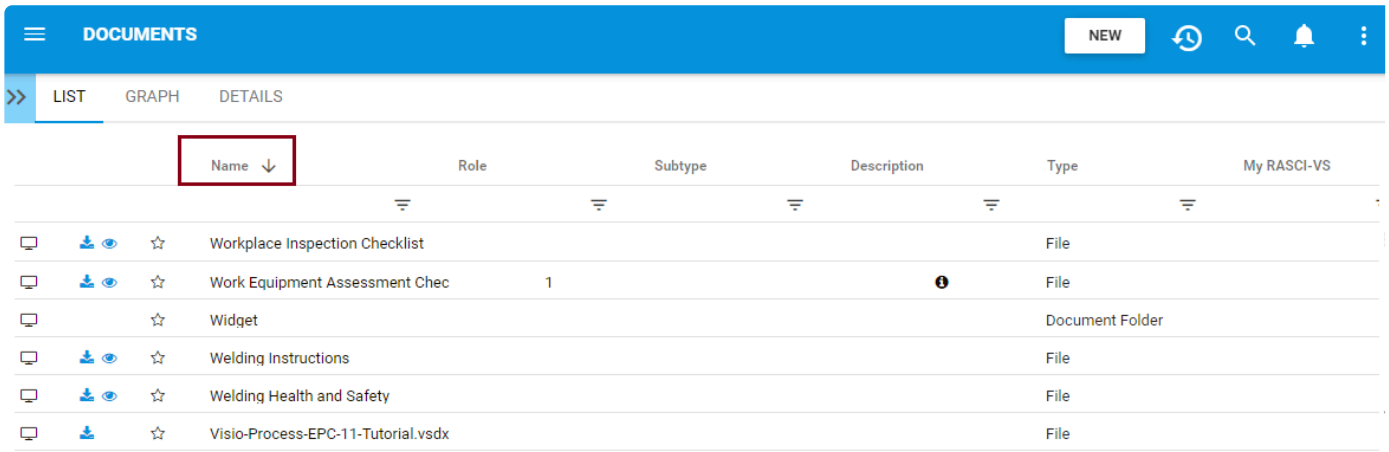
3. Click on the **Category**

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.



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



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
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
Org Units	Empty – The object has no associated org unit Not-Empty – The object has at least one associated org unit
Asset	Empty – The object has no associated asset Not-Empty – The object has at least one associated asset
Documents	Empty – The object has no associated documents Not-Empty – The object has at least one associated document
Subtype	Empty – The object does not have a business type associated Not-Empty – The object has at least one business type associated
Categories	Empty – The object has no category associated Not-Empty – The object has at least one associated category
Identifier	Empty – The object does not have a unique identifier Not-Empty – The object has a unique identifier
Description	Empty – The object has no written description Not-Empty – The object has a written description
Type	Document Document Set Document Folder File Report Template Generated from Template URL
My RASCI-VS	Responsible Accountable Support Consulted

	Informed Verifier Signatory
Extension	Empty – The object has no extension Not-Empty – The object has an extension
Last Modify By	Textual search of last resource who last modified an object
Modified Date	The specific dates that things have been modified by
Status	Shows the status of the item in question (published vs in-progress) Sent for Approval Approved Rejected Out of Sync Sent for Endorsement Revised
Locked	False – The object isn't locked True – The object is locked

The Filtering section will cover the following:

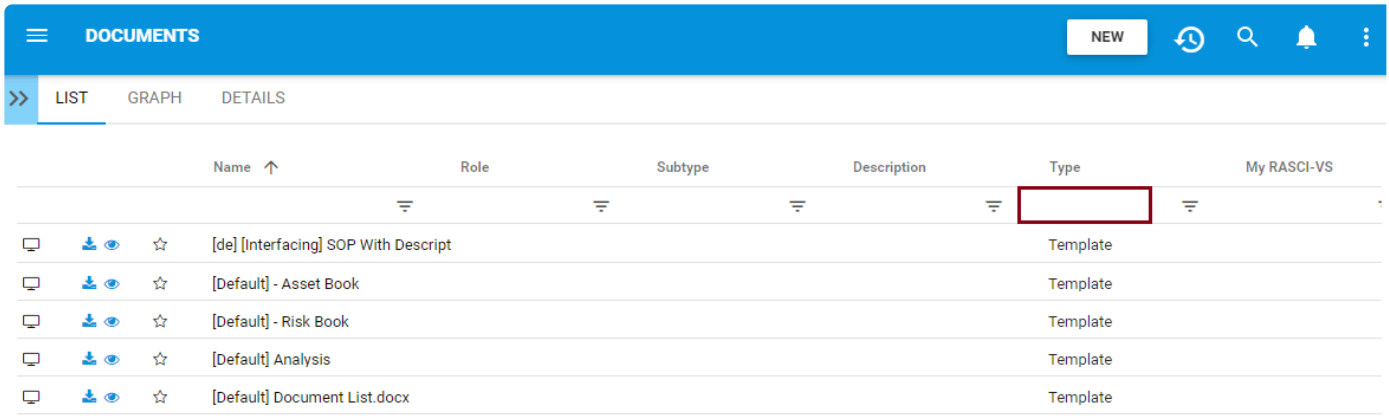
1. How to Add Filters
2. How to Remove Filters
3. How to Combine Filters

4.7.2.2.1 Add Filter

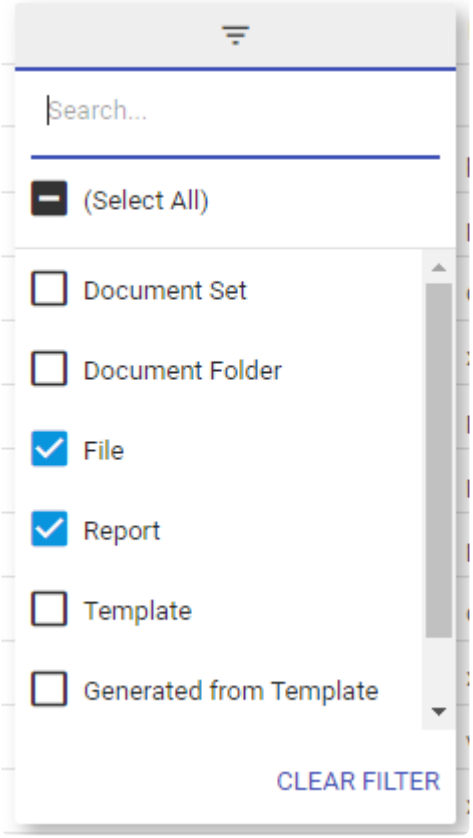
You can add filters to see items and other specific documents of your choice. **Type** what you are looking for, **select** the filter in the drop-down menu, or **define the range of dates.**

How to Add Filter

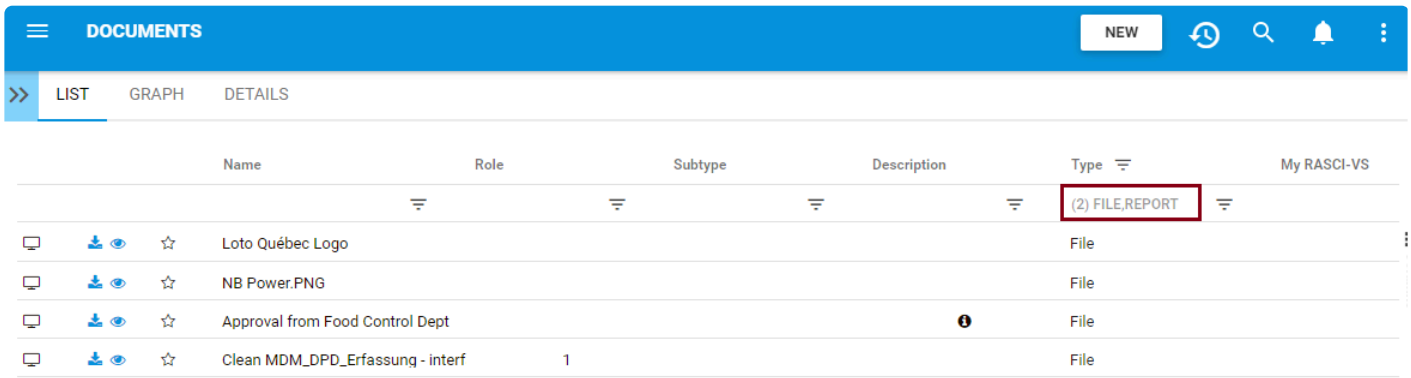
1. Navigate cursor and select the box column you wish to filter. For this example, we will use **Type.**



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



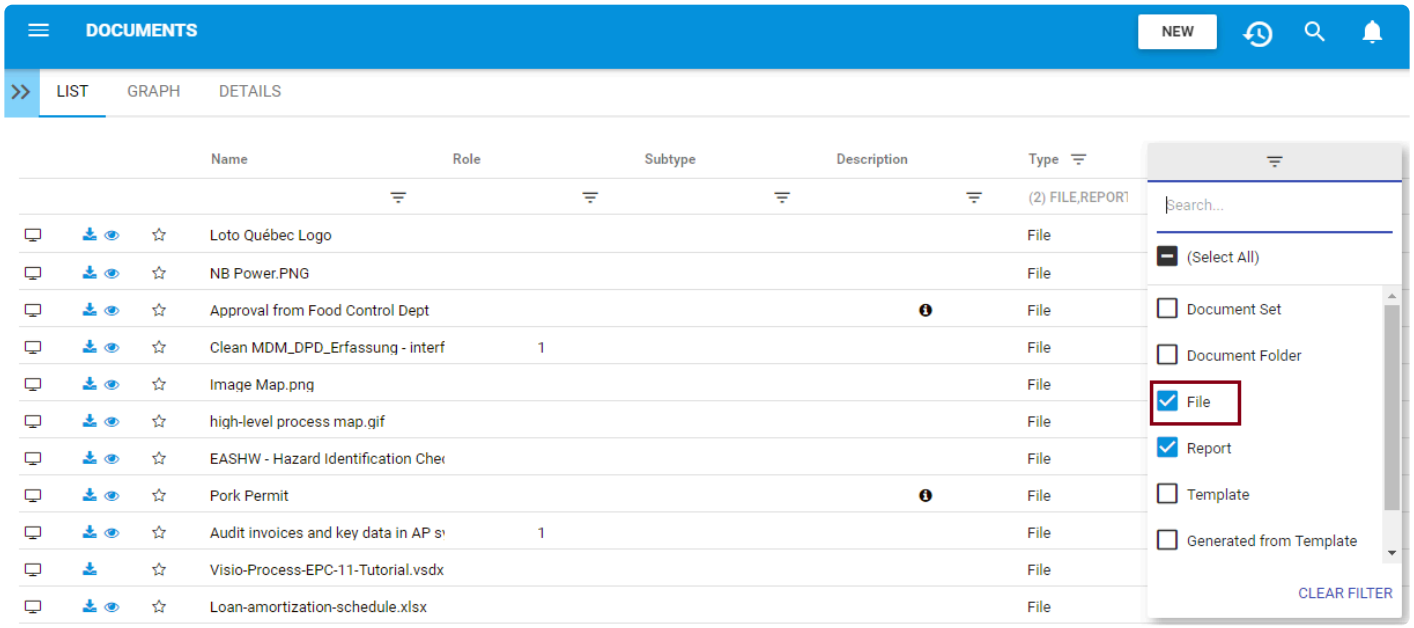
3. Select the desired filter. For this example, we will select **Document** and **Document Set.**



4.7.2.2.2 Remove Filter

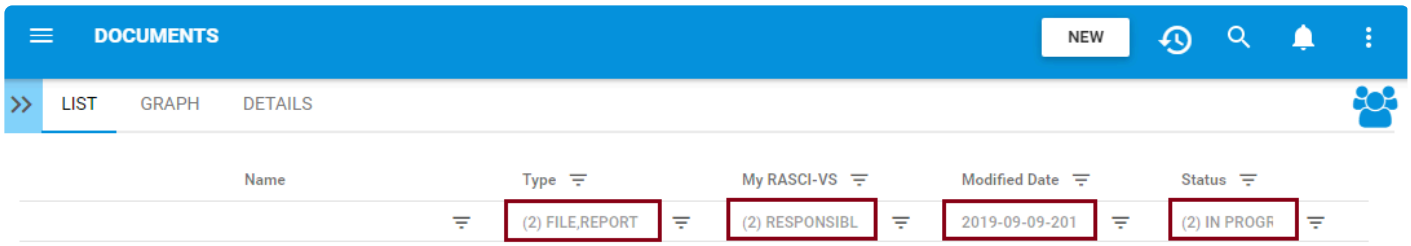
You can remove filters; this will naturally increase the results in your list.

Click on the button beside the filter name.



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.



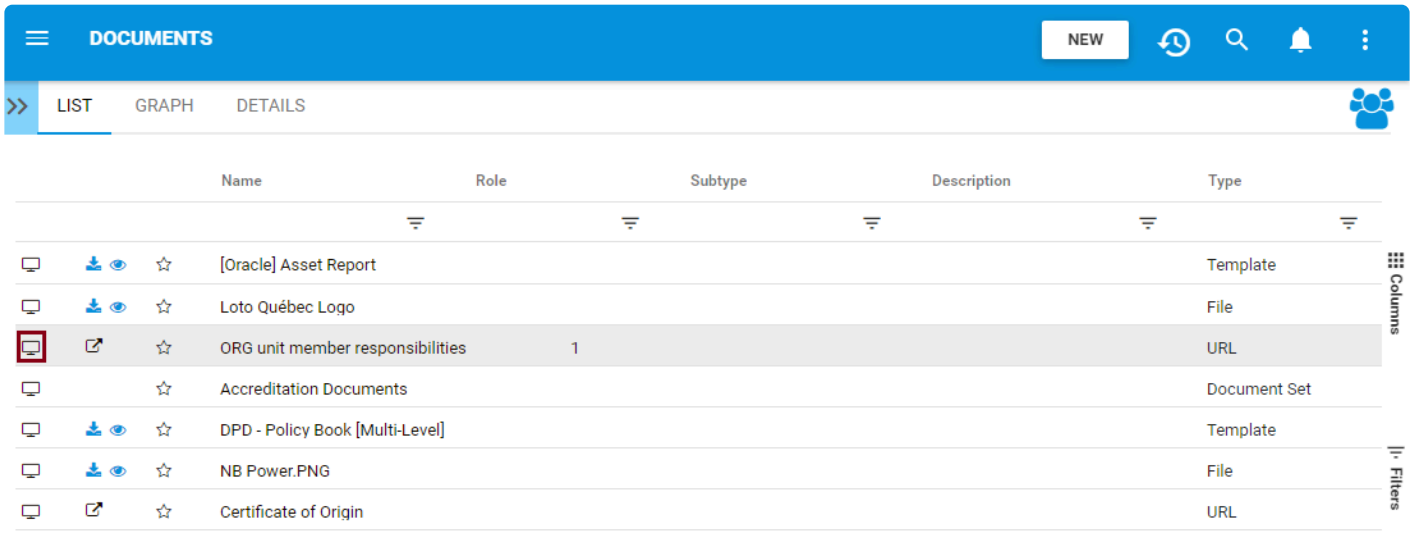
4.7.2.3 Quick Graph View

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.



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.

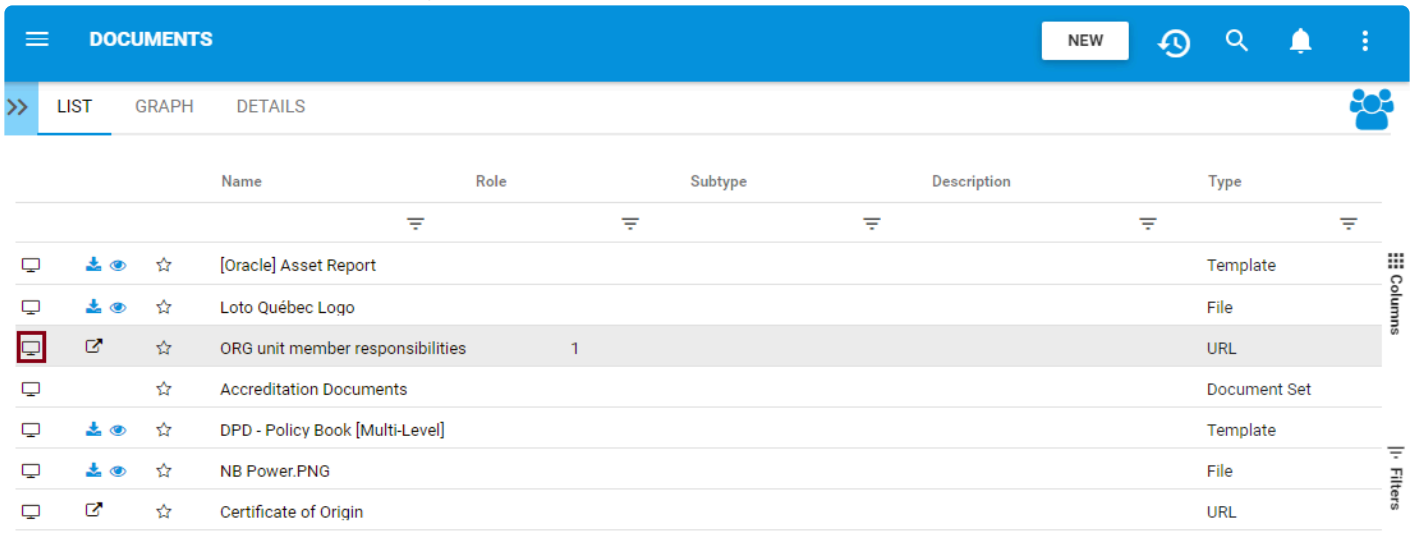
This section will outline Manual Navigation. Please see Quick Graph View section above for alternative navigation options.

How to navigate to the Graph section (Manual Navigation)

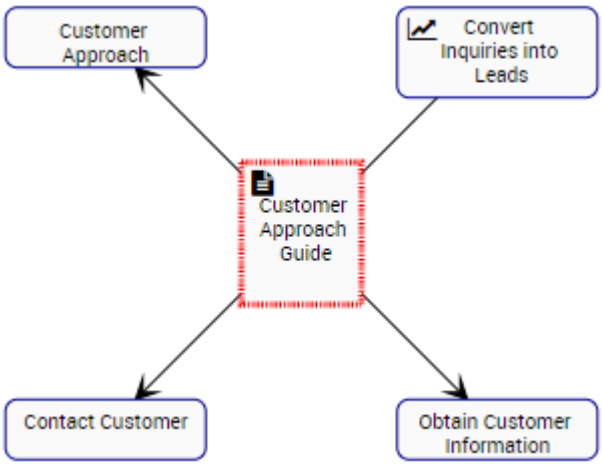
1. Click on the **Navigation Menu Button** on the top left of your screen.

2. Click on **Documents**

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

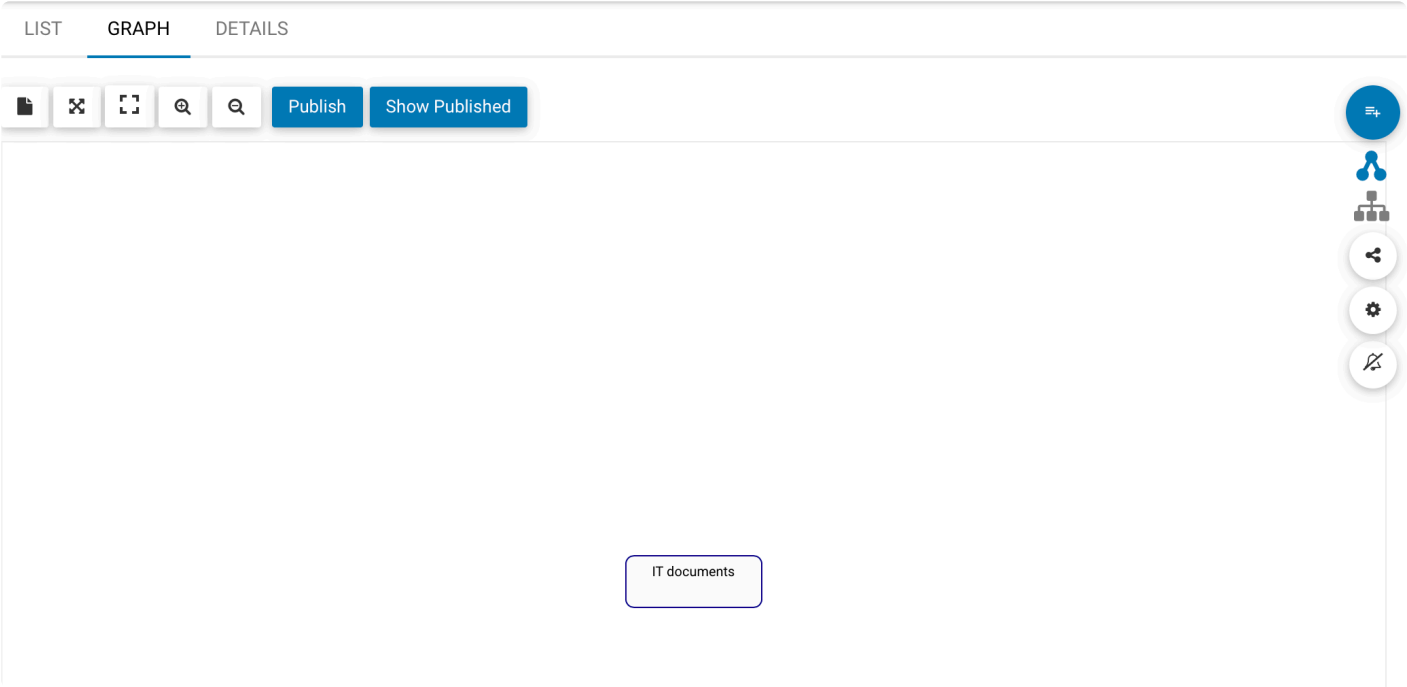


4. By default, users will be sent to Impact view as the default Graph view. An example of this view can be seen below.



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
Object Book		SOP process book generation
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

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
Share		Copies URL to user's clipboard to share
Settings		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.

4.7.3.1.1.2 Fit Screen

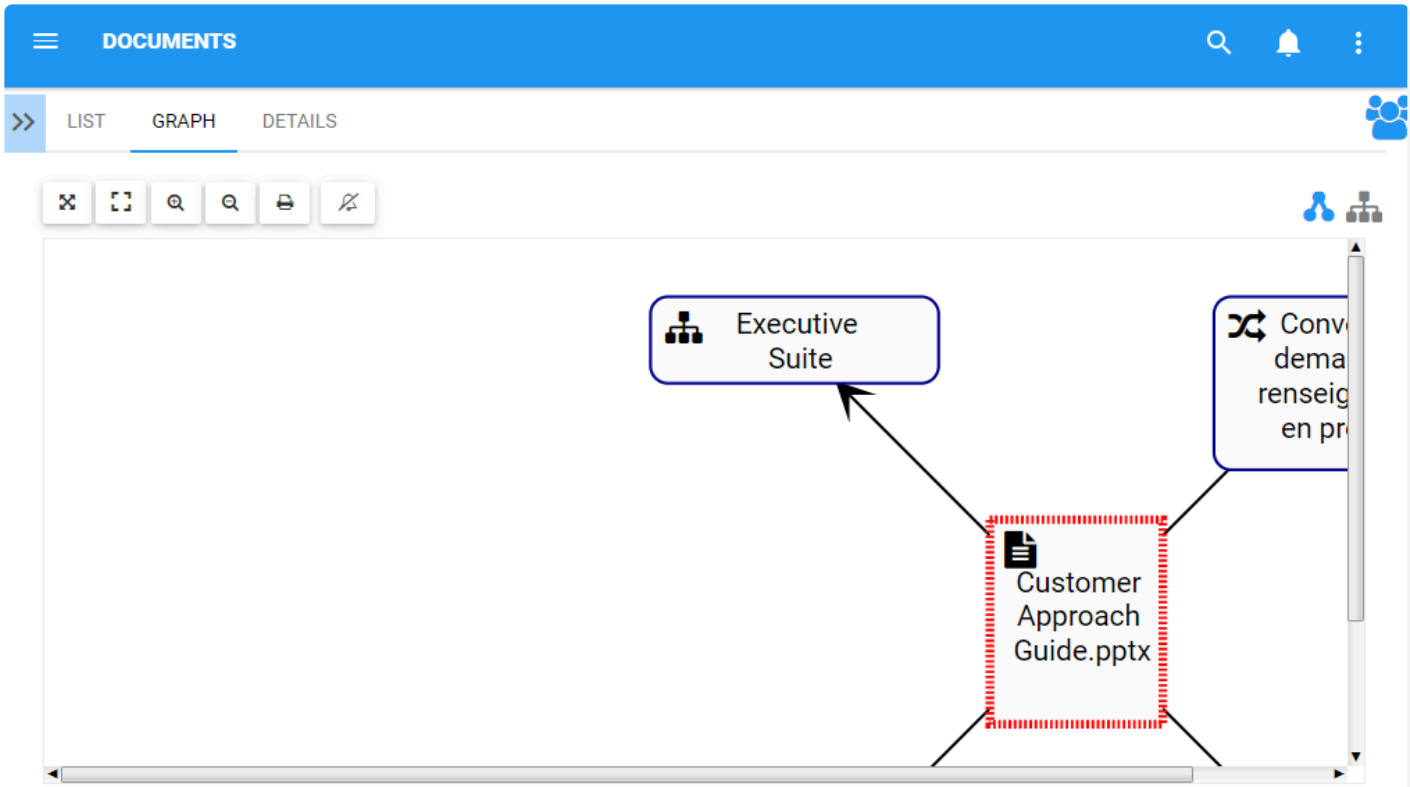
The fit screen function has been implemented to assist users at replacing and re-centering graphs.

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

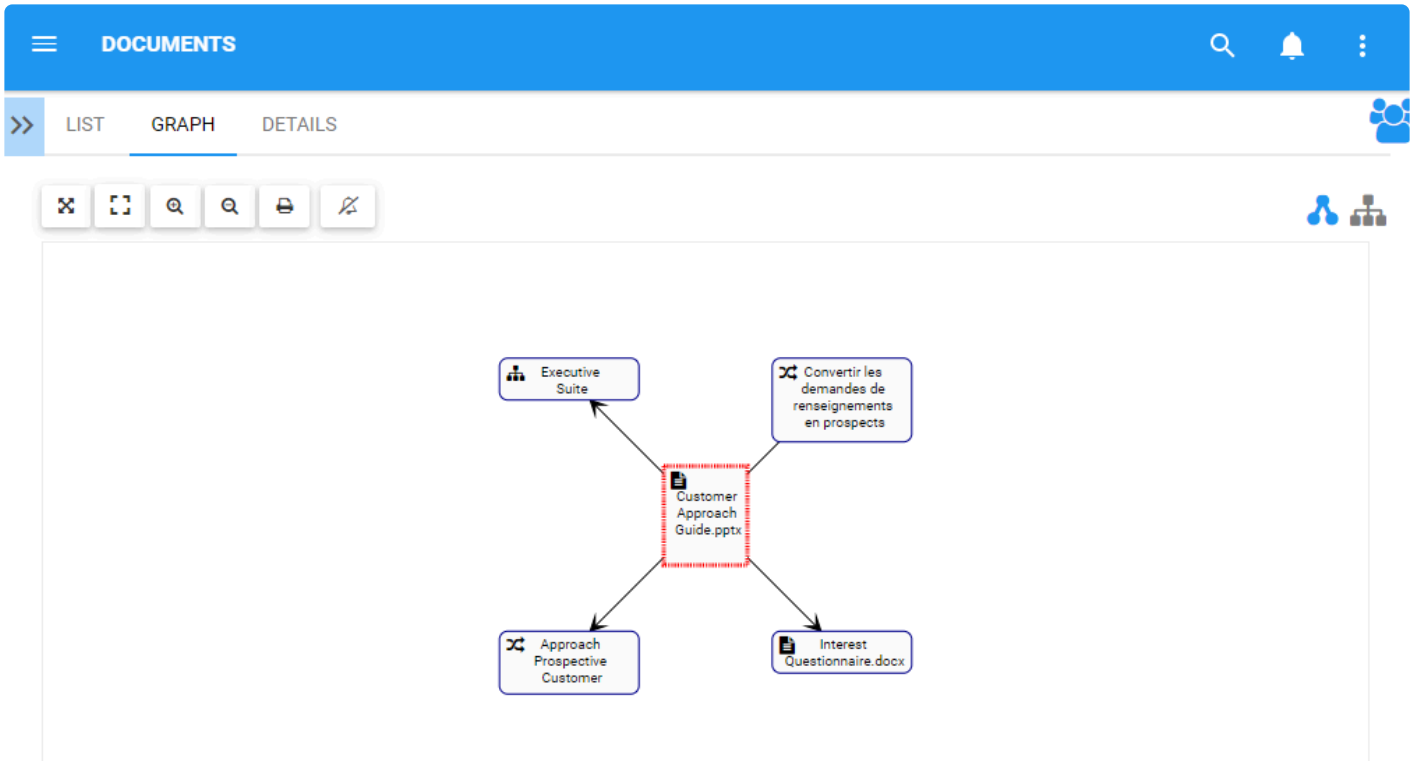
1. Navigate to a Document within the Documents Module

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

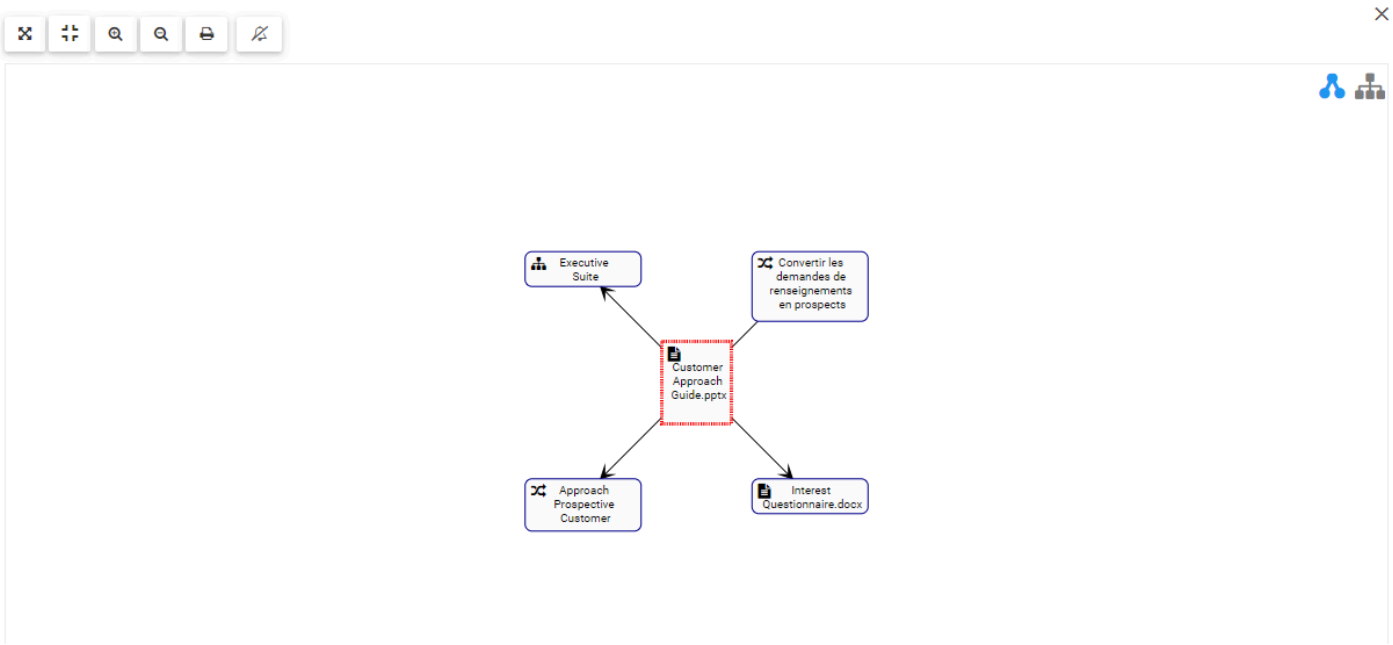

DOCUMENTS
LIST
GRAPH
DETAILS
Executive Suite
Convertir les demandes de renseignements en prospects
Customer Approach Guide.pptx
Approach Prospective Customer
Interest Questionnaire.docx

4.7.3.1.1.3 Full Screen

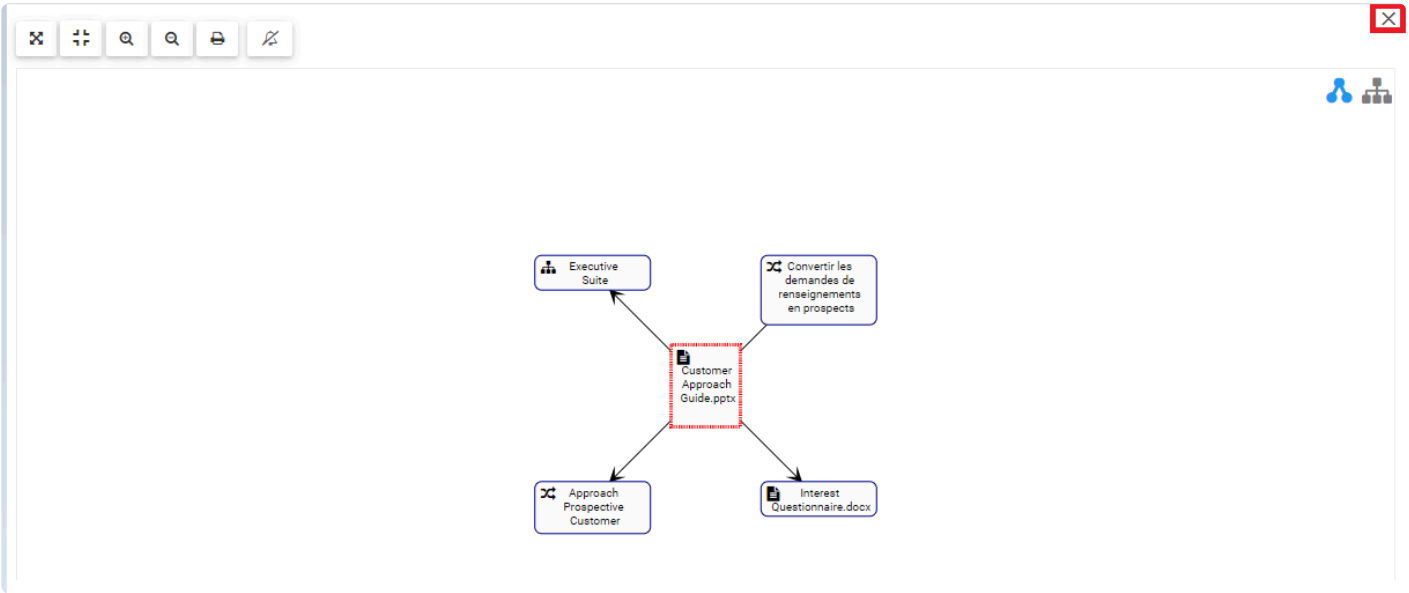
The fit screen function has been implemented to assist users at viewing Graphs, utilizing the full screen of a user.

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



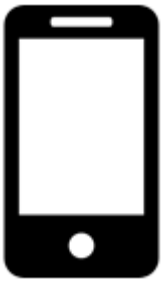
4.7.3.1.1.4 Zoom In

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.

4.7.3.1.1.5 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

Coming Soon

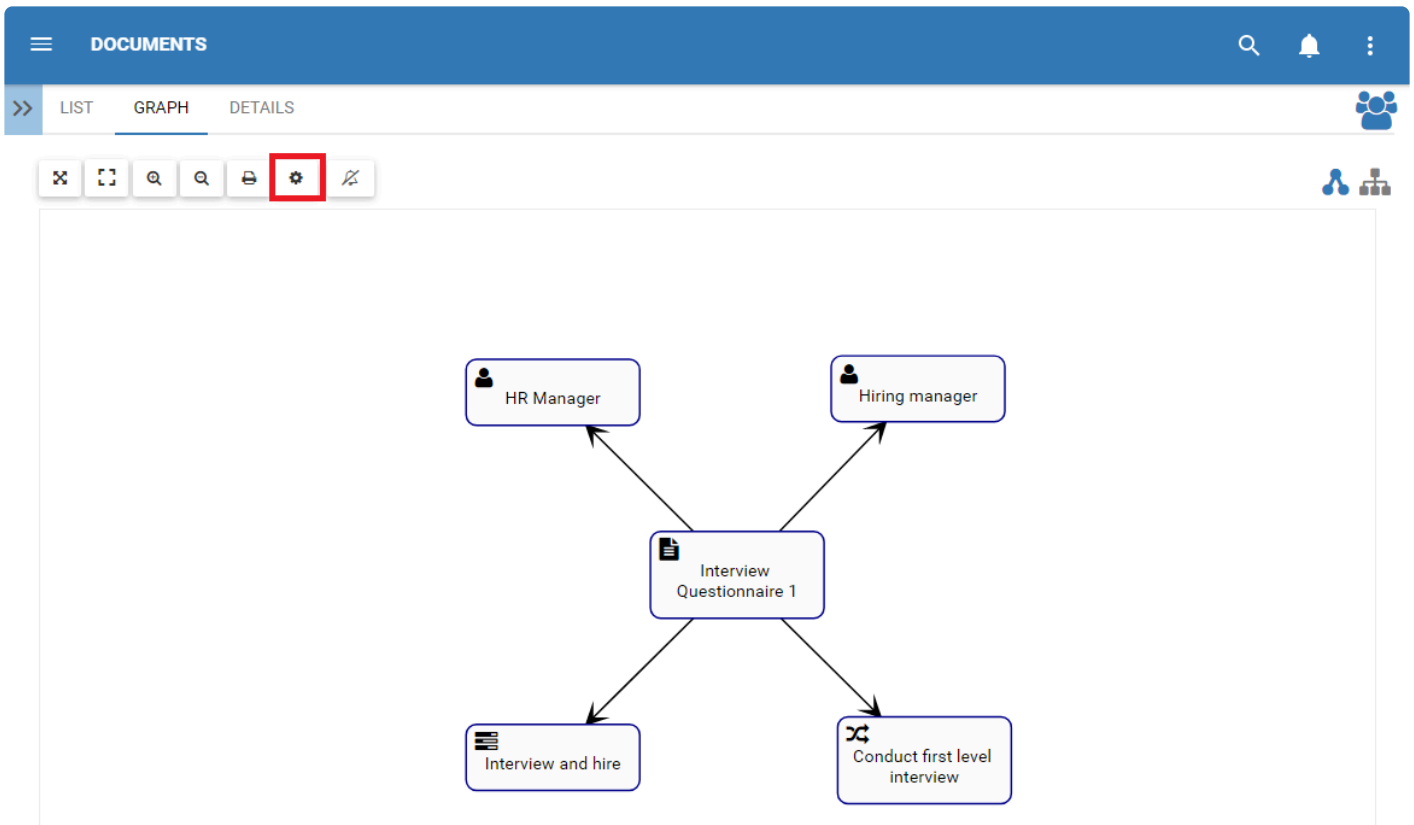
4.7.3.1.1.6 Options

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

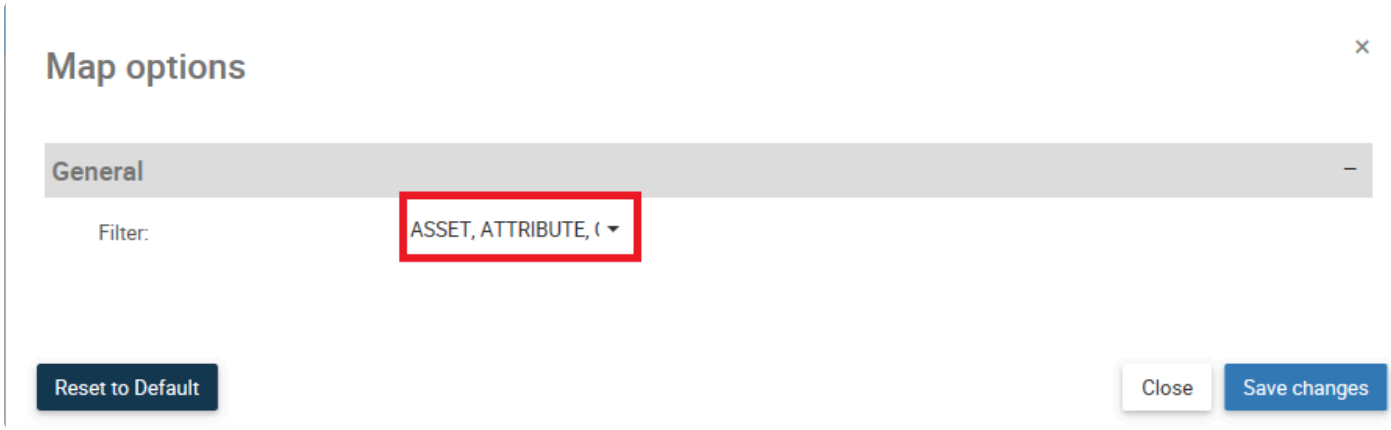


2. The Options panel will be displayed on the screen as shown

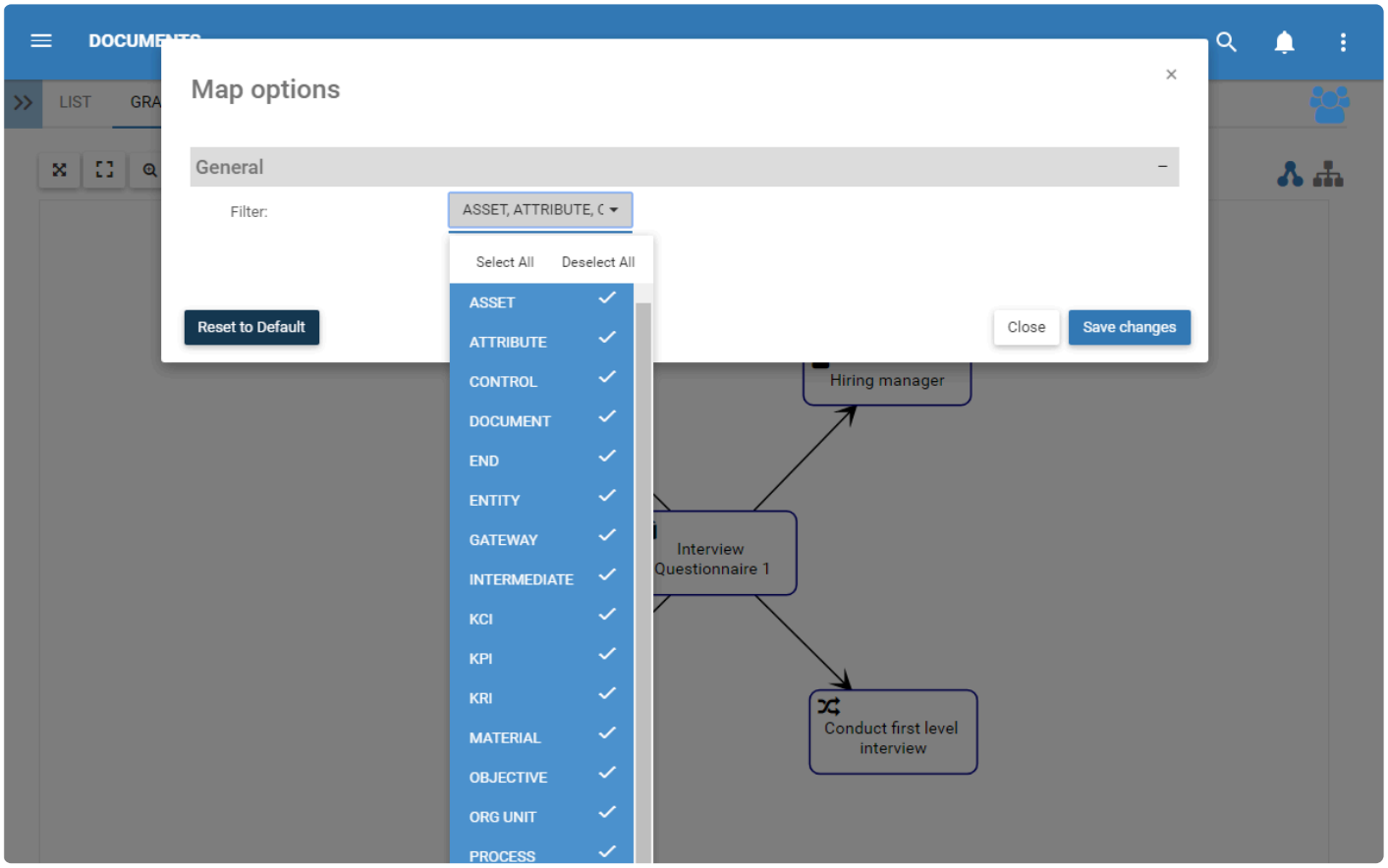
To customize the graph and use the Filter option, please see the steps below:

1. Select “Options” icon

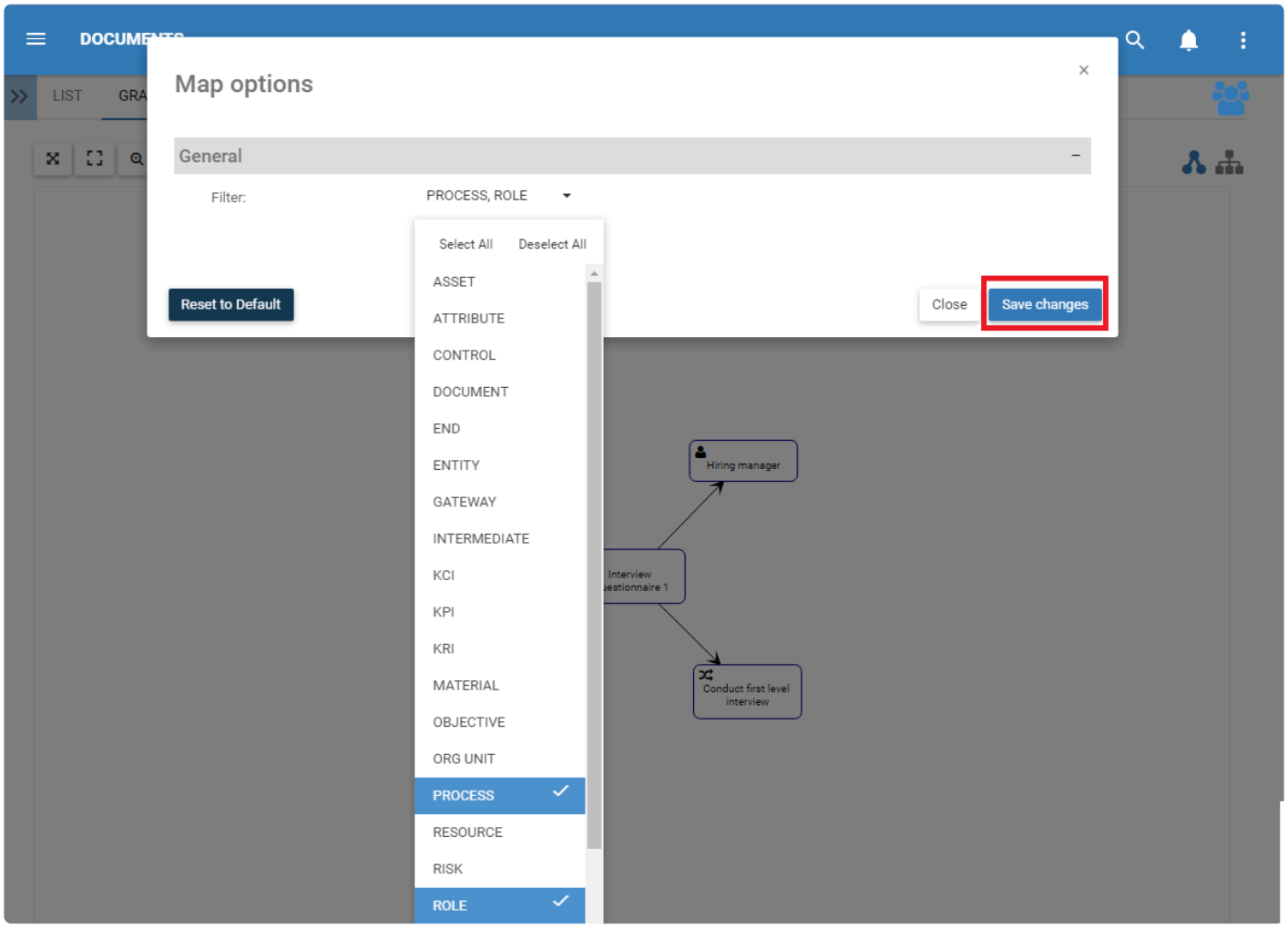
2. Navigate cursor to “Asset, Attribute”



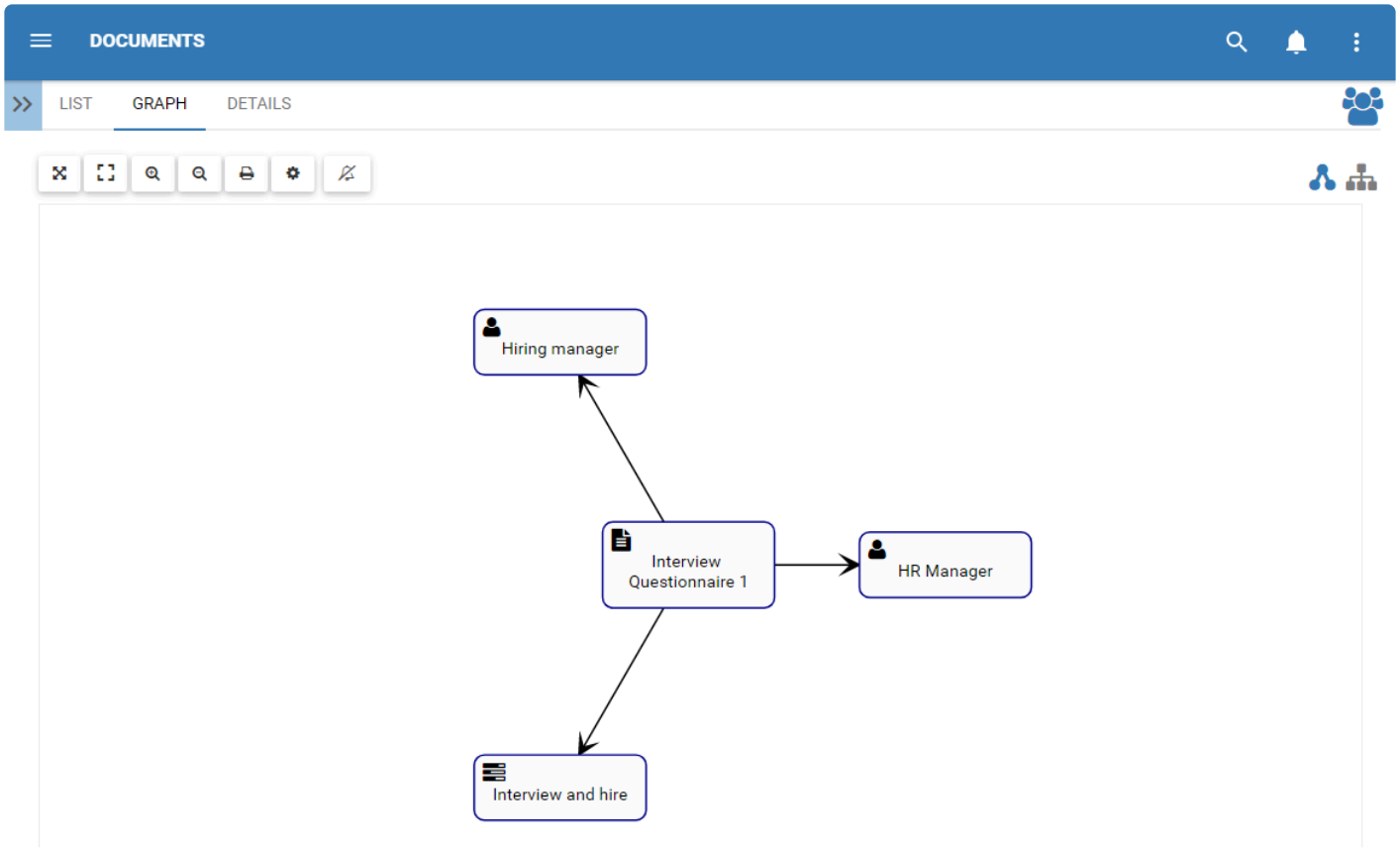
3. The following drop-down menu will be generated



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**


DOCUMENTS
LIST
GRAPH
DETAILS
Hiring manager
Interview Questionnaire 1
HR Manager
Interview and hire

4.7.3.1.1.8 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.

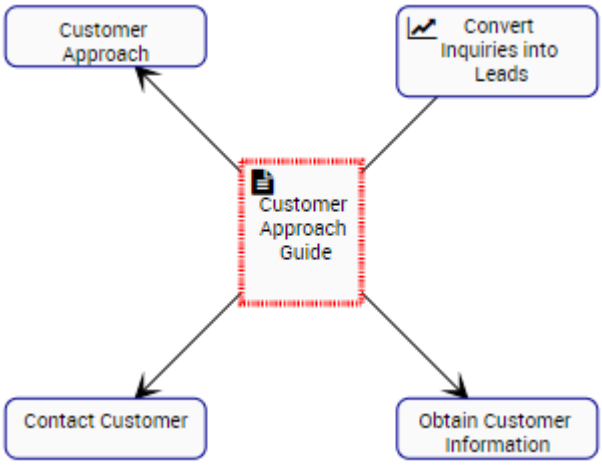
To use the Subscribe button, please see the following instructions.

1. 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.

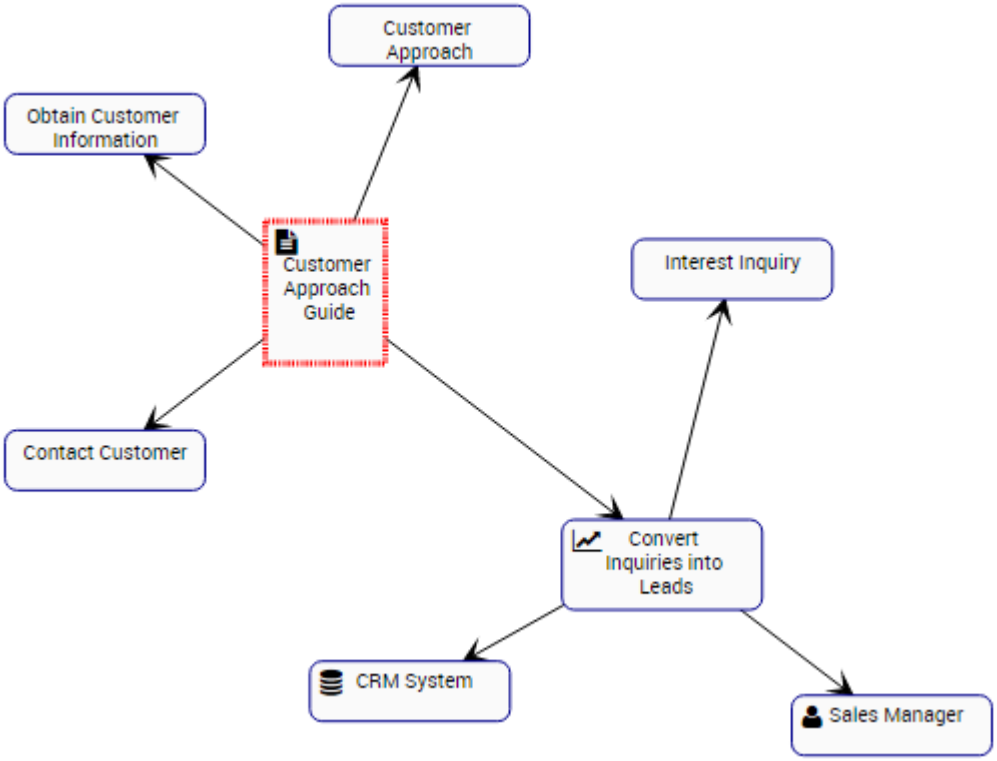
Impact Graph



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.

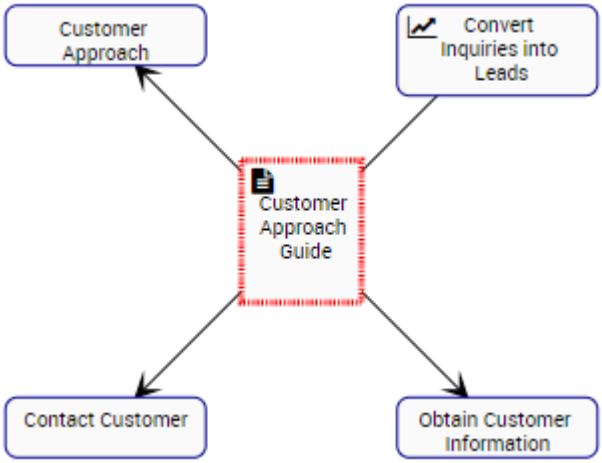
Impact Graph Navigation

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

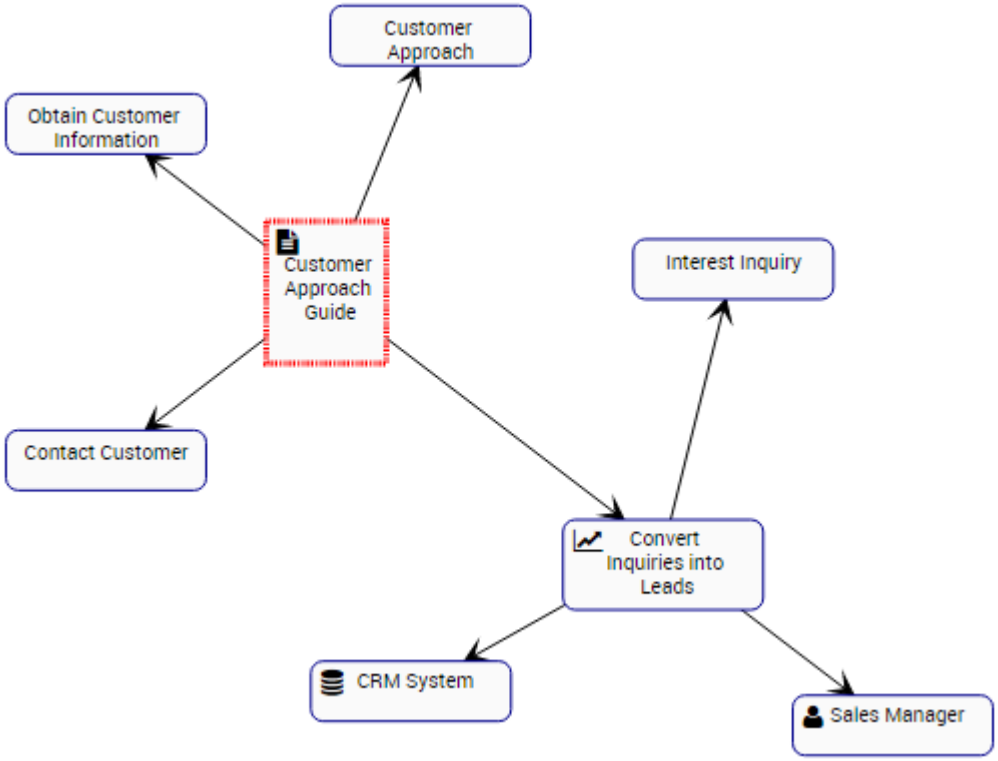
1. Navigate to a Document within the Documents Module

2. Click on the Quick Graph View icon

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



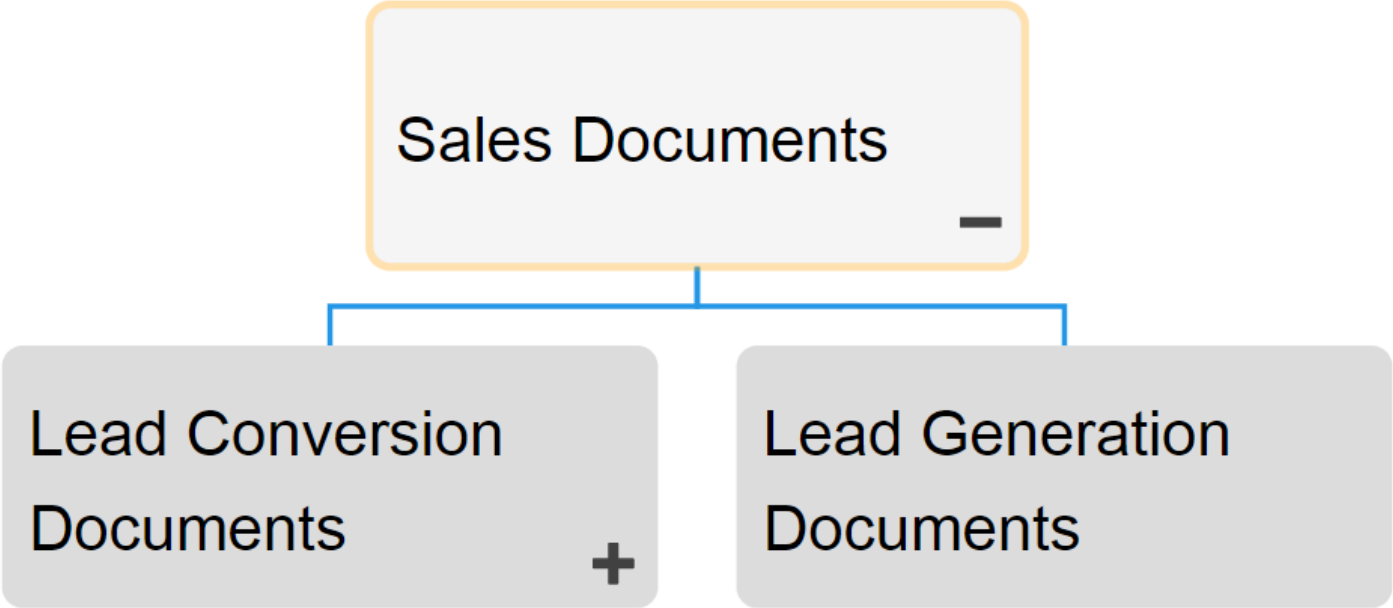
4. (Optional) To further expand the Impact Graph, simply double-click on the item which you would like to display



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.

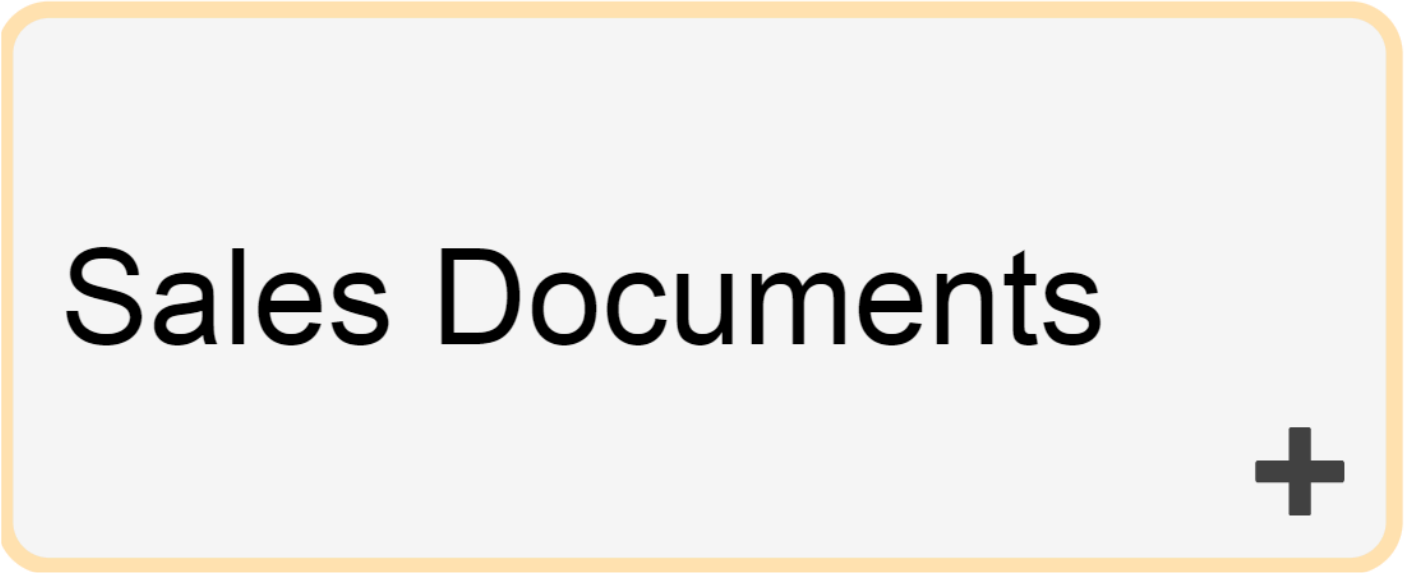
> The further you navigate, the more you limit the scope of Hierarchy Graphs. To view a complete picture of organizational structure, select items listed as “Document Folders or Document Sets” in List View

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

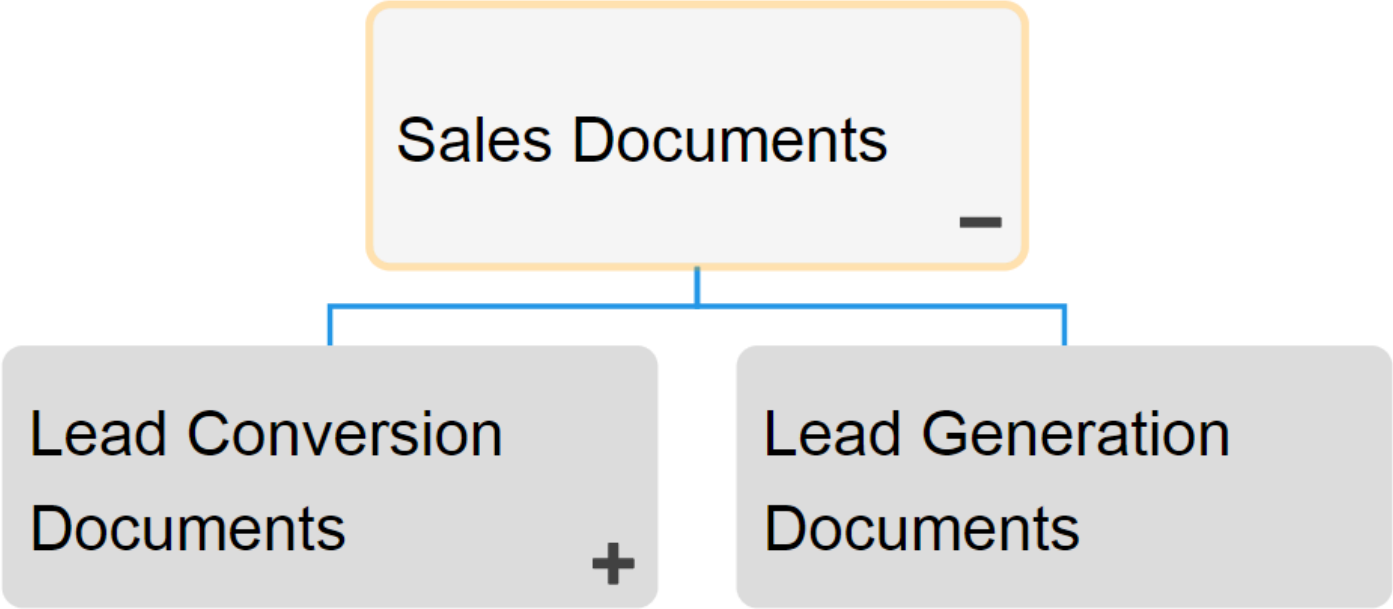
4. Please select the Hierarchy Graph icon

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.

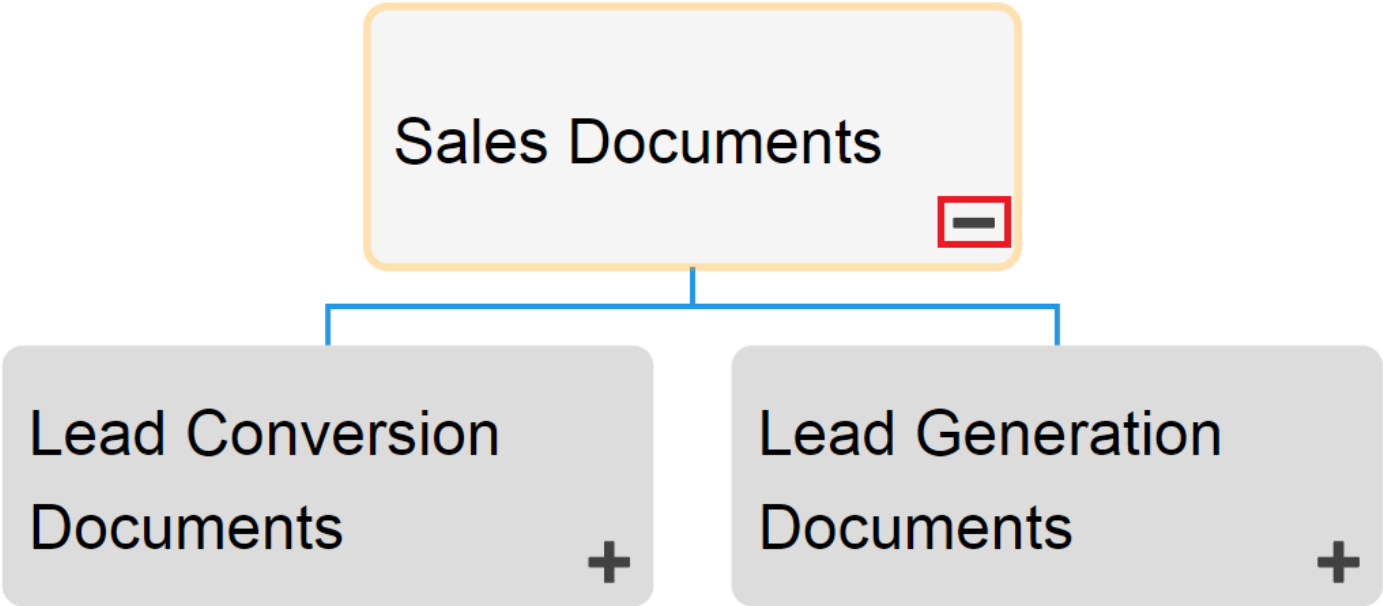


6. To further expand components of the Hierarchy Graph, double click on the on the objects in the Graph. This will expand the item selected.



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

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


Sales Documents
Lead Conversion Documents
Lead Generation Documents

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.

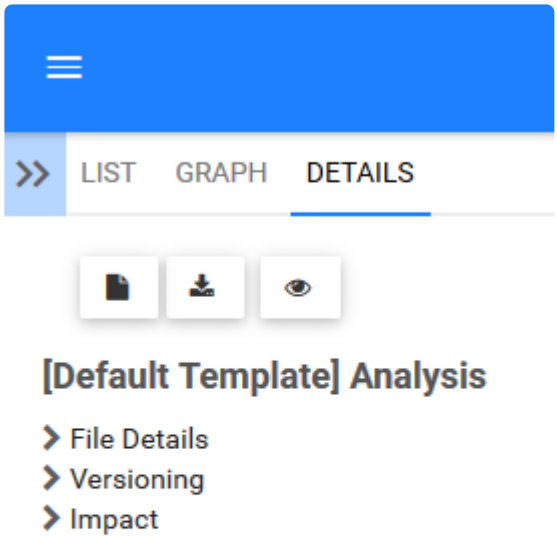
The details section is where users can see all information about items.

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. Subscribe



4.7.4.1.1 Toolbar

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

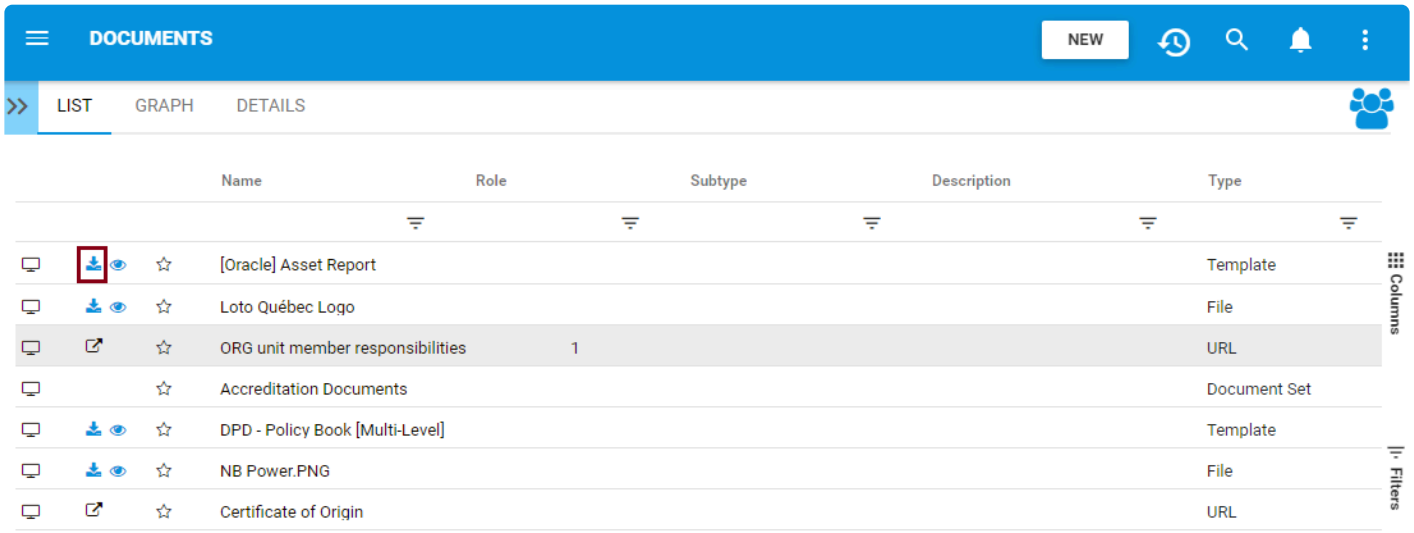
Item	Icon	Description
Print		This button will allow a user to print the details page being viewed
Favorite		Allows users to sort by favorites in the “My Actions” widget
Share		Copies URL to user’s clipboard to share
Subscribe		This button will allow a user to subscribe to the document being viewed. The 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.



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 miliseconds (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)

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/efaidnbmnnnibpcajpcglclefindmkaj?hl=en
	https://get.adobe.com/reader/
	https://get.adobe.com/reader/

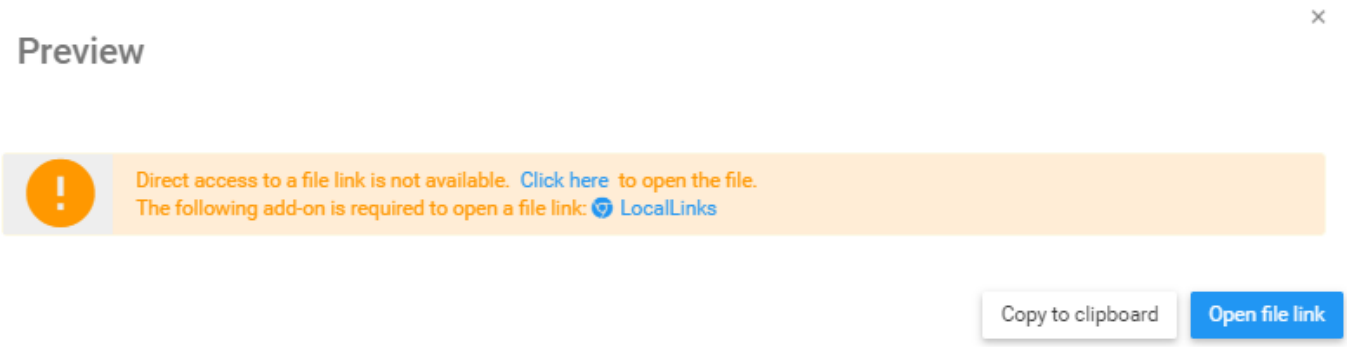
	https://get.adobe.com/reader/
	https://get.adobe.com/reader/

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/

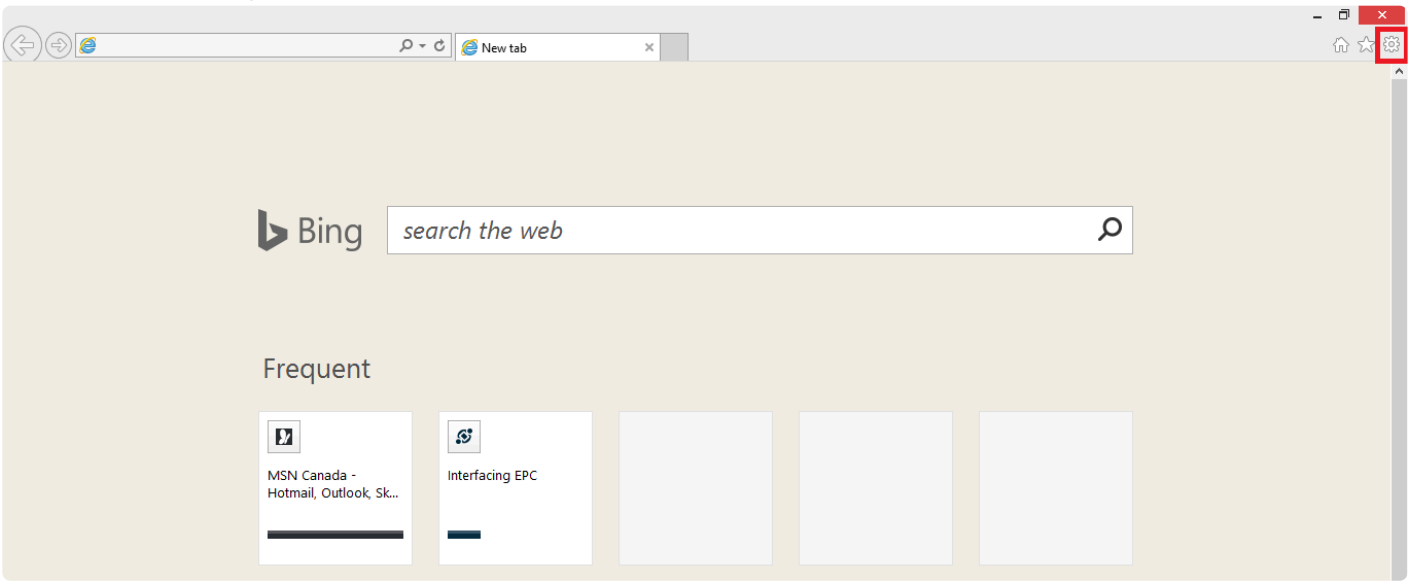
Internet Explorer

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

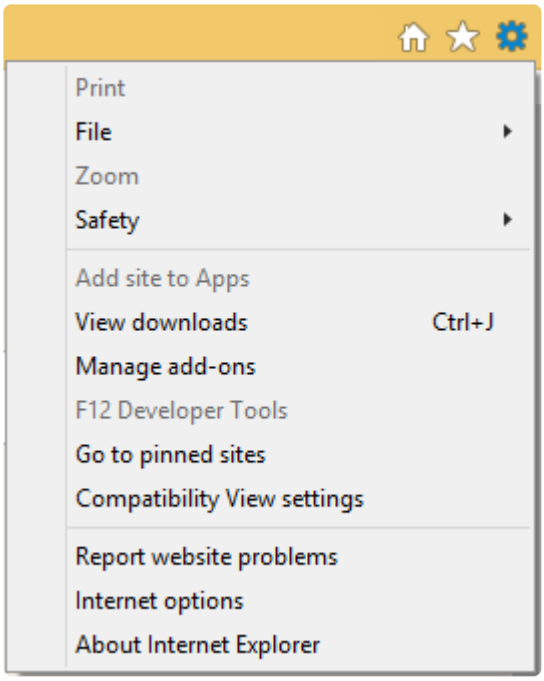
Please see the steps below:

1. Open Internet Explorer

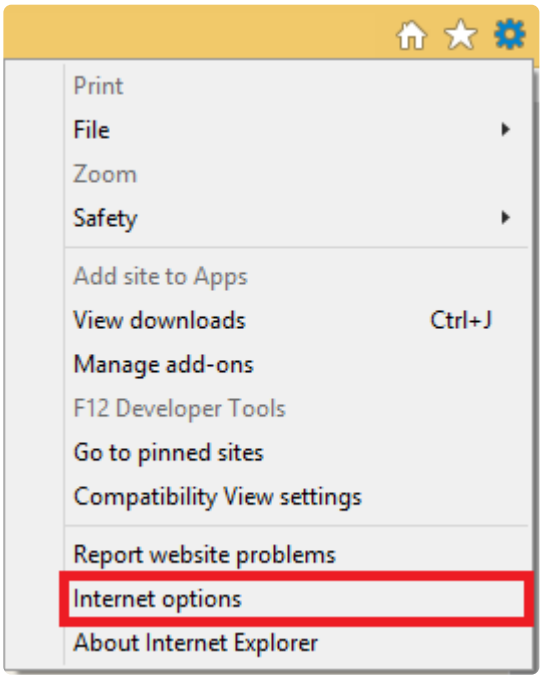
2. Select the settings icon



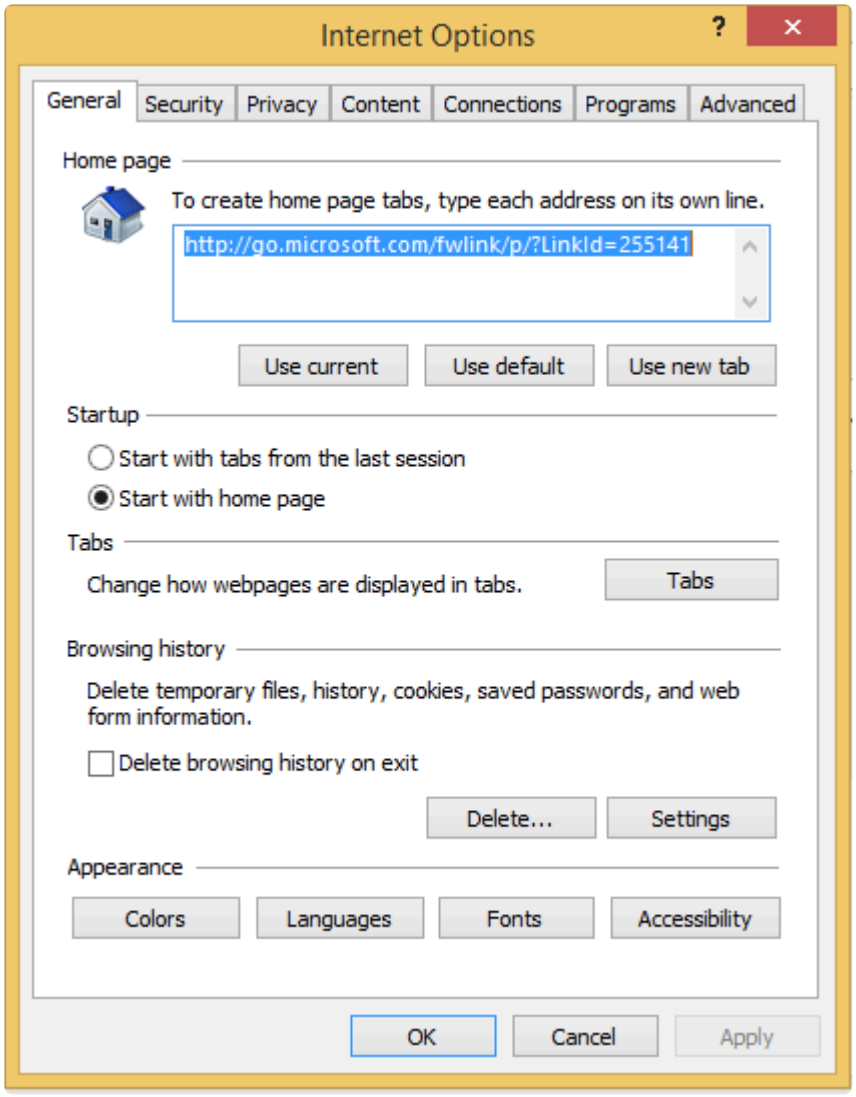
4. This will generate a drop-down menu



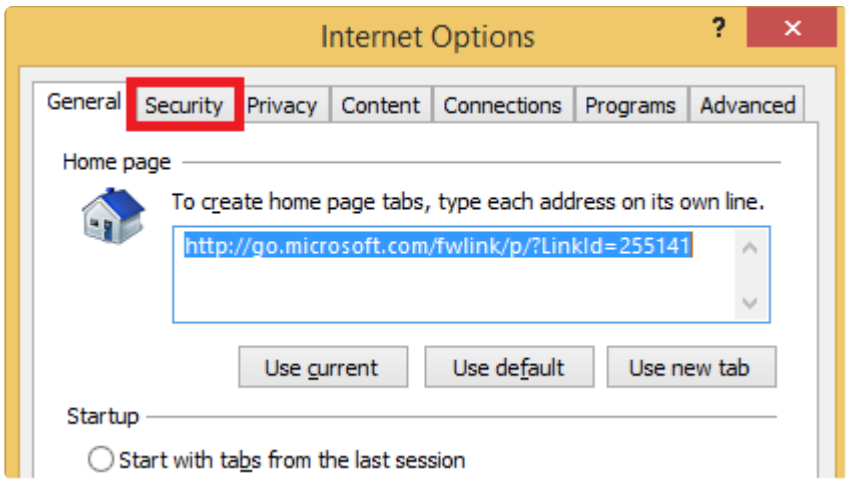
5. Select “Internet options”



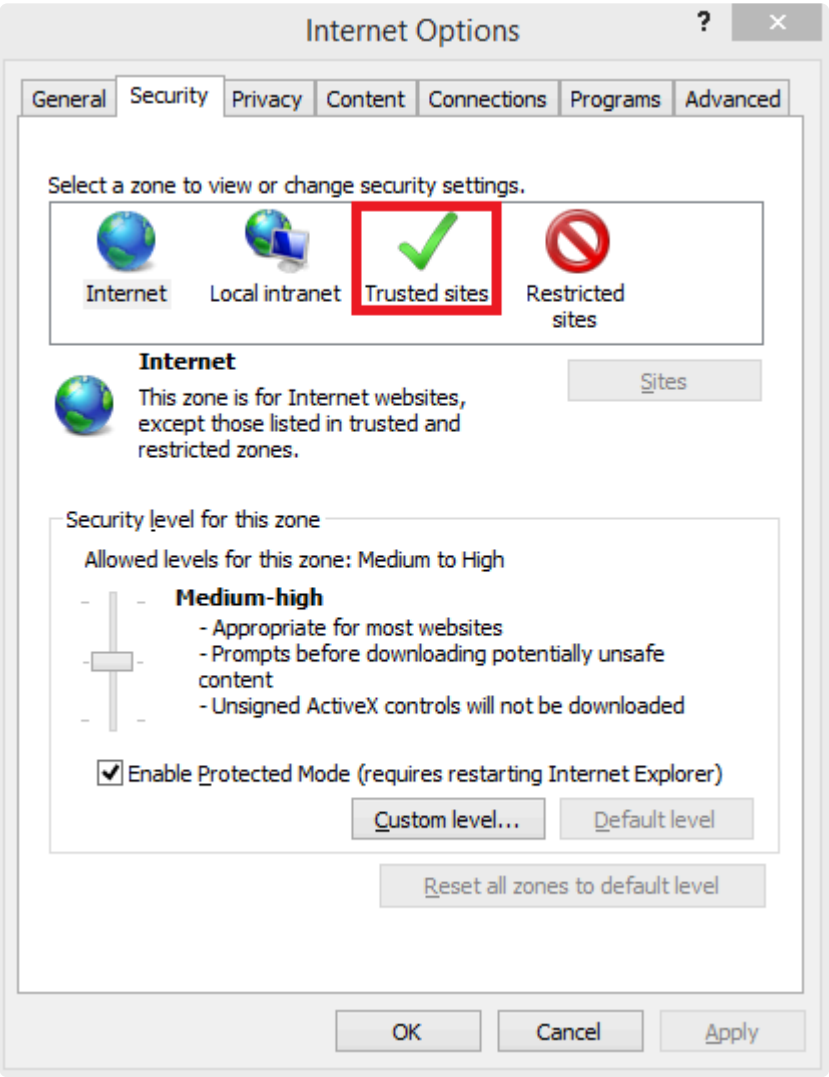
6. This will generate the following pop-up window



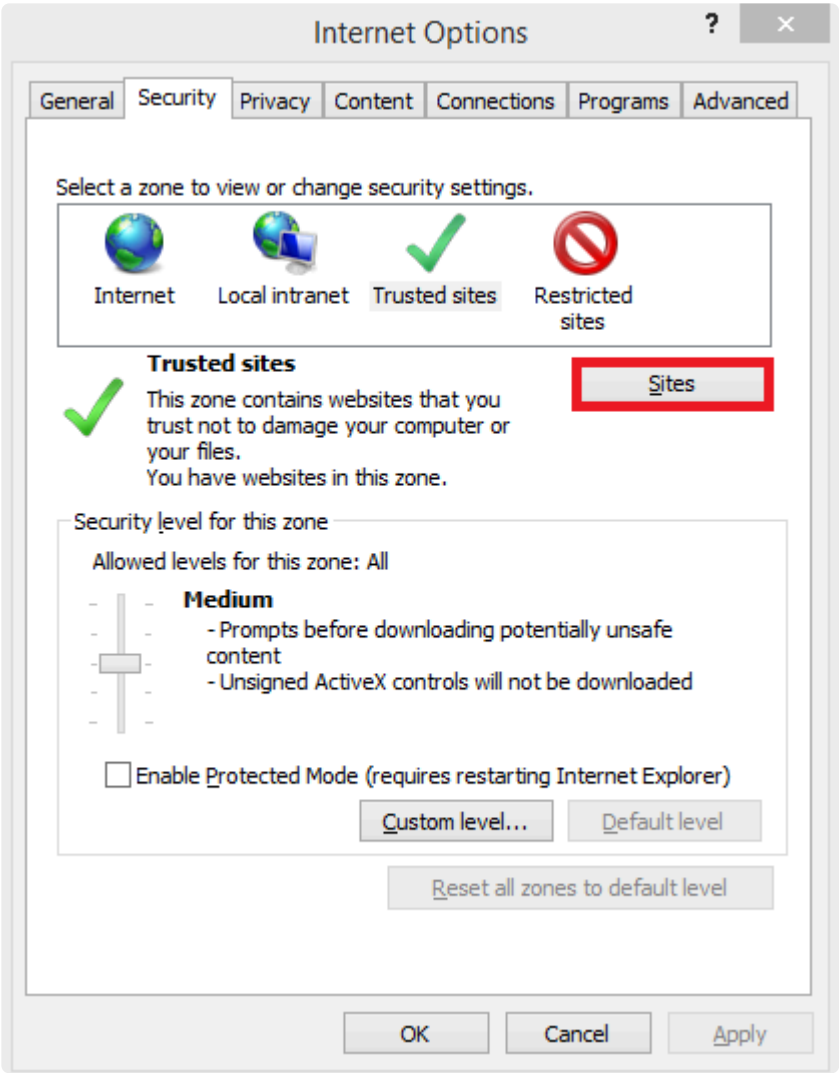
7. Select the Security tab



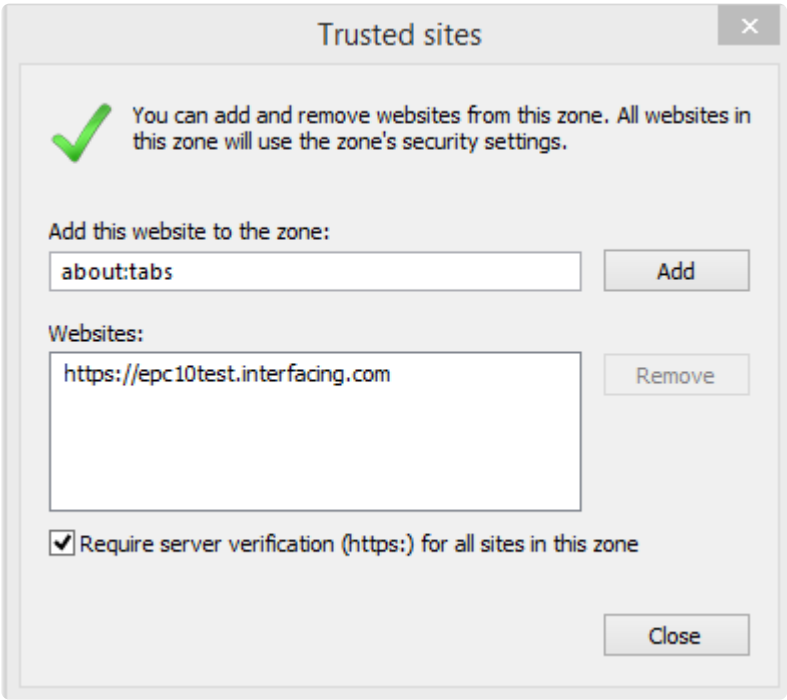
8. Once you have navigated to the “Security” Tab, select the “Trusted sites” icon



9. Select the “Sites” icon



10. This will generate a pop-up window



4.7.4.1.1.1 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.

4.7.4.1.1.4 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 provides for objectives and performance measures. Note however that all relevant info for items will be displayed.

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

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:

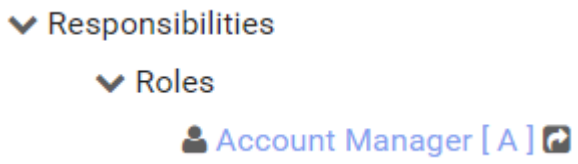
File Details

File Type	Template
File name	Interfacing Default Approval.docx
Size	83.21 KB

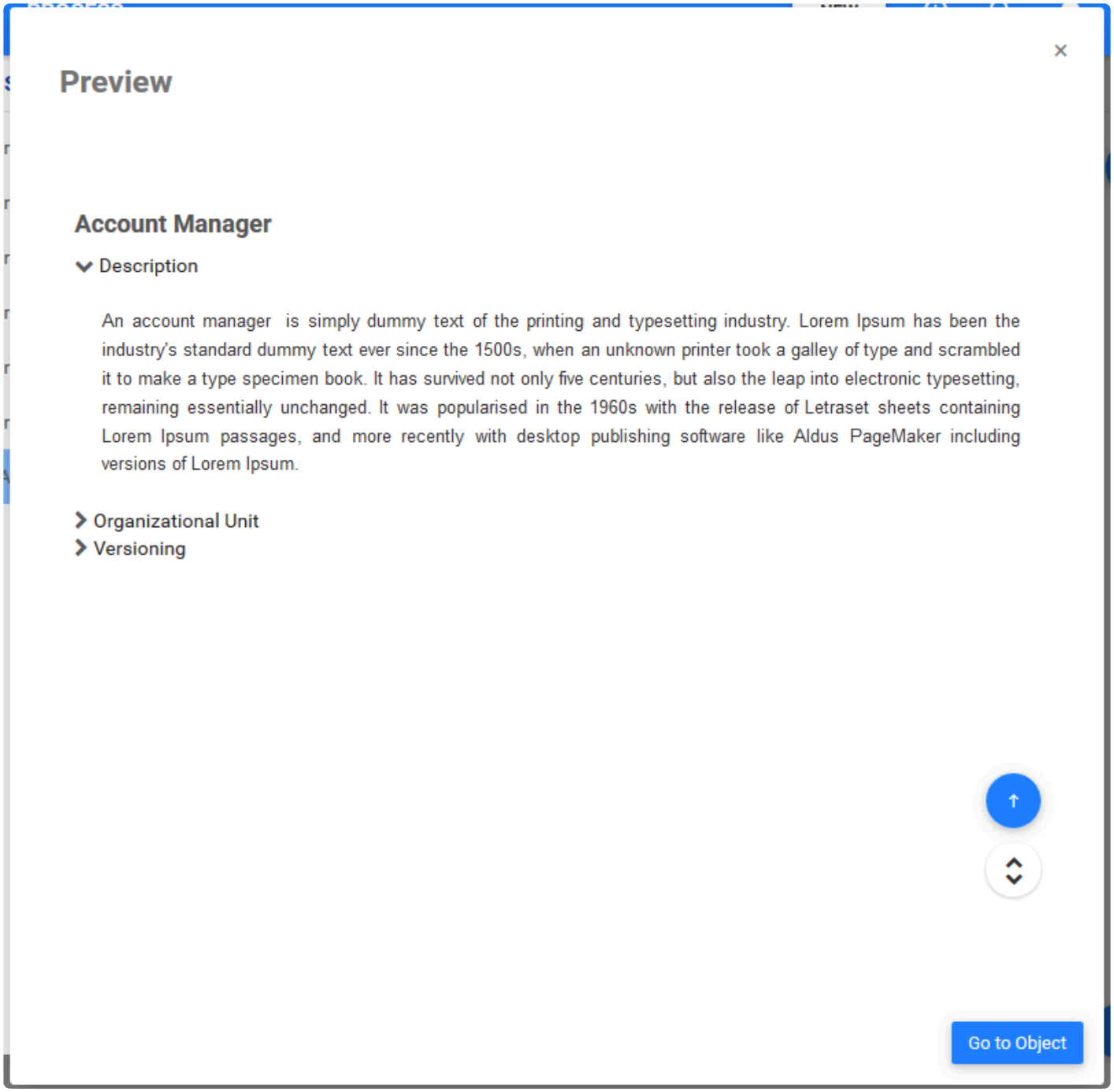
4.7.4.2.3 Responsibilities

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

To navigate directly to the object, click on the icon.



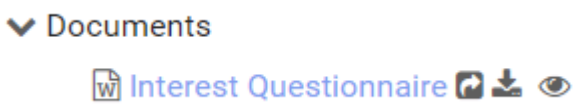
Users can click on the object's name to view its details in a popup. To go to the object's detail page, click on **Go To Object**


Preview
Account Manager
Description
An account manager is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged. It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum.
Organizational Unit
Versioning
Go to Object

4.7.4.2.5 Documents

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

To navigate directly to the object, click on the icon.



Users can preview or download the document:

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

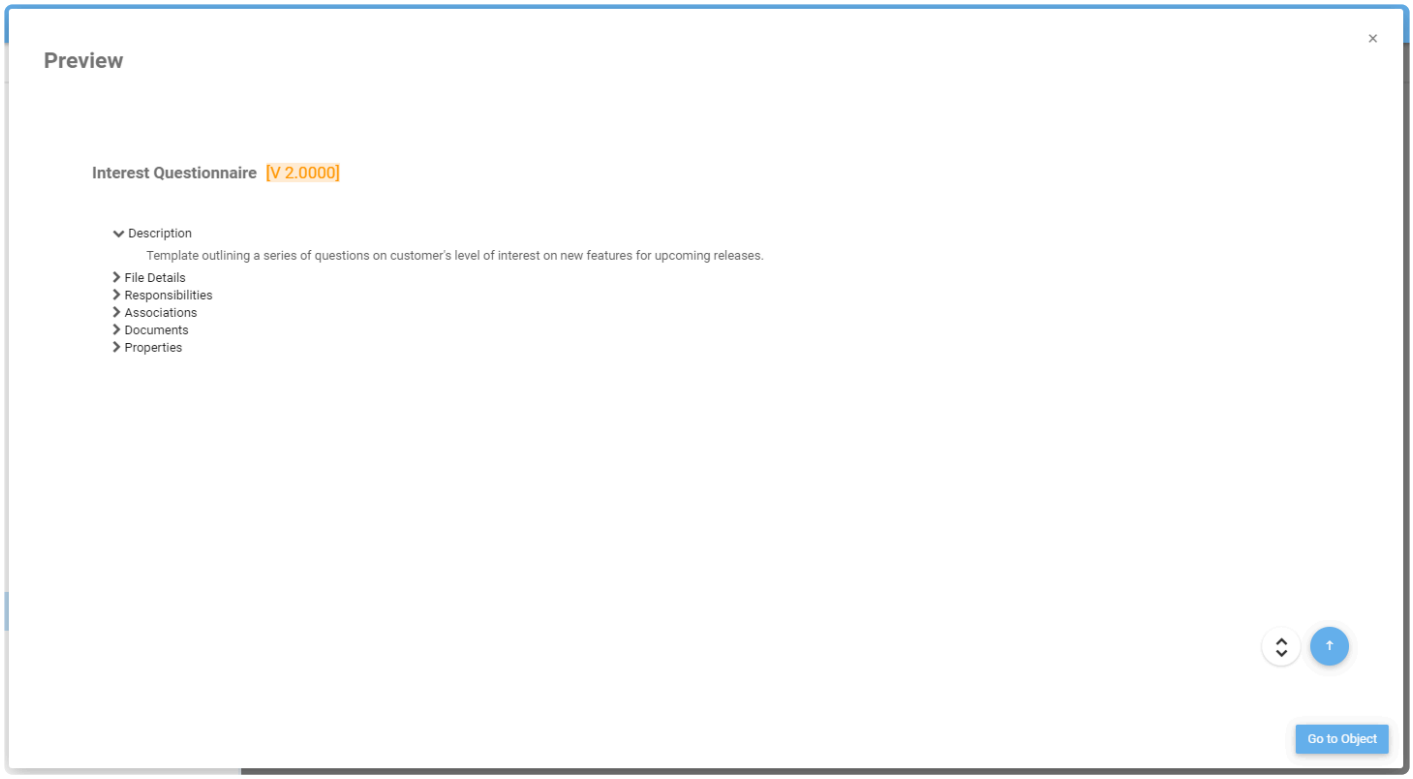
2. **Download**: To download the document click on the icon

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

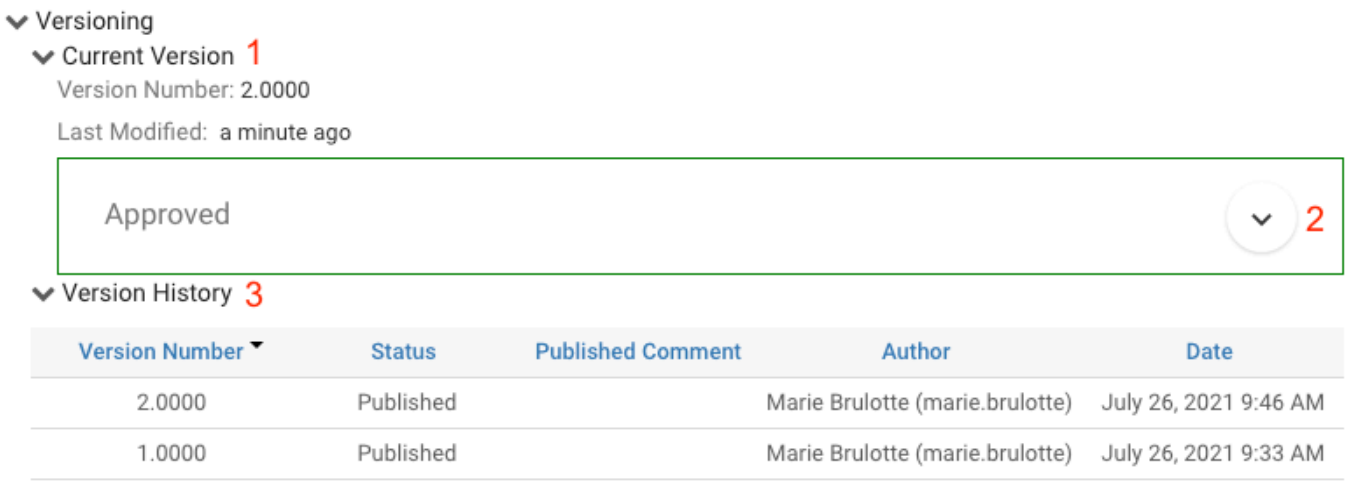
Users can click on the document's name to view its details in a popup. To navigate to the document's detail page, click on **Go To Object**



4.7.4.2.6 Versioning

The Versioning section provides users with additional key information about items. This section is broken down into 3 categories:

1.**Current Version**: Provides information about what version is being viewed, and when the latest modification has been made
2.**Version History**: Provides information on previous versions of the document. Includes major and minor versions, status, author and date. Note that for the documents module, you are able to download previous versions of documents. The download icon will only appear if a new document has been uploaded for that version.
3.**Analysis**: Provides information that better allows users to analyze items and related key details.



4.7.4.2.7 Impacts

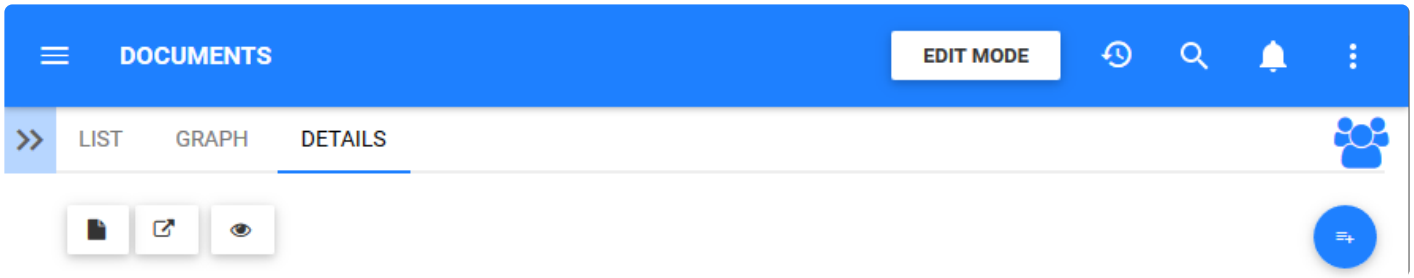
Users are able to view the impacts an object has on others in a list form in the Details view of any object. It is a complement to the Impact Graph, and another way of visualizing impact data.

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 to an object. Impacts 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.

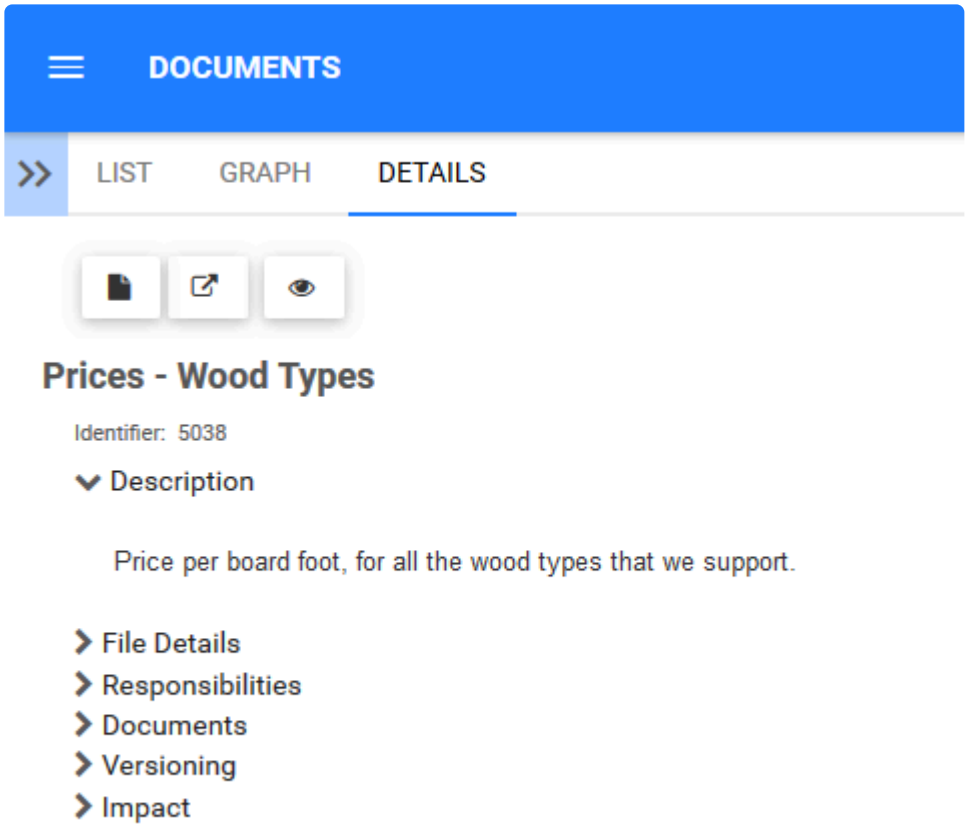
> The impact list will only show **direct** impacts, as opposed to the impact graph, which can be expanded to show **indirect** impacts on an object

Navigating to the Impact List

1. Navigate to any Detail page of any object in EPC



2. At the bottom of the Details page, click on Impact to expand the section



3. All direct impacts associated to the EPC Object will be listed.

> To sort a column by alphabetical order, click on it's header. The arrow pointing up indicates sorting in **Ascending Order**, the arrow pointing down indicates sorting in **Descending Order**, and no arrow indicates **No Sorting**.

Object Name A	Parent B	Object Type C	Assignment Type D	Justification E	Impact Type F	Status G
[Default Template] Analysis (A4 - Lands...	Default template folder	Document	Directly Impacts		Association	Published
Document should be reviewed every yea...	Import Folder	Rule	Directly Impacts		Association	Published
Enforce a zero-tolerance policy for dang...	Import Folder	Control	Directly Impacts		Association	Published
Onboarding cost	Imported Objective	KPI	Directly Impacts		Association	Published
Ratio of candidates to hires	Imported Objective	KPI	Directly Impacts		Association	Published
Risk B - with risk analysis!	Import Folder	Risk	Directly Impacts		Association	Published
Warehouse	Imported Measure Set	Objective	Directly Impacts		Association	Published

A	Object Name	The Name of the object. Click on the hyperlink to go to the object
B	Parent	The Parent of the object
C	Object Type	The type of the object
D	Assignment Type	The relationship type between the two objects

E	Justification	The justification of the object
F	Impact Type	How does this object impact the current object
G	Status	The status of the object (In Progress or Published)

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.

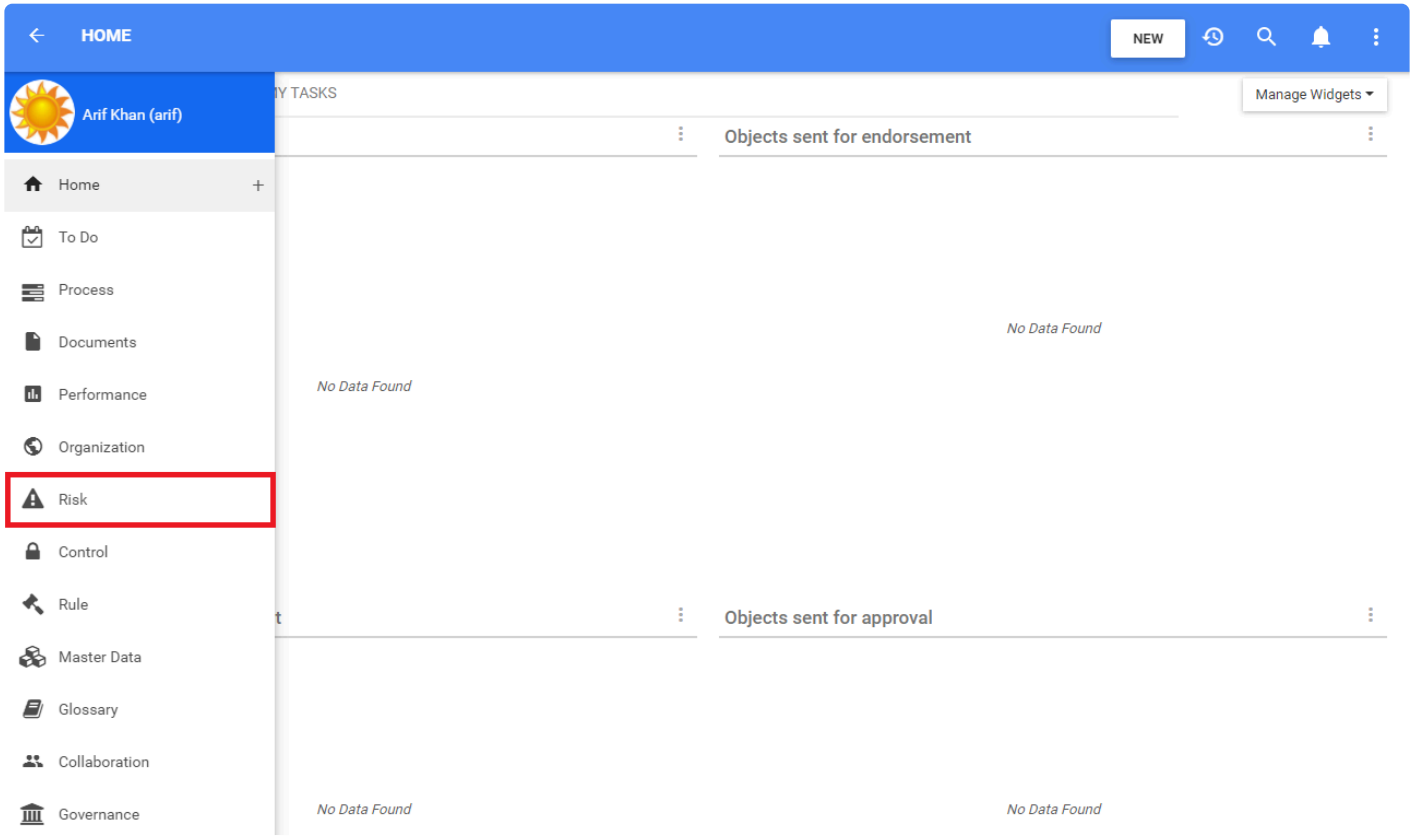
Dimension	Details
1. List	Provides view of all risk sets you have access to
2. Graph	Provides the visual representation of the risk set, their features and links (Impact and Hierarchy Graphs)
3. Details	Provides additional key information regarding specific risk details

How to access the Risk module:

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

or

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. No hierarchy filter	A list view where **all** items within the given module are listed
2. Current level & below	A list view where **all levels below** the selected item are listed
3. Current level	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
Identifier	Textual search for any existing unique identifier of an object
Detectability	Allows users to sort the item in question by its detectability value
Child Risks	Whether or not there is minor Risks associated with this 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
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
Subtype	Whether or not if this object is classified as a business type
Categories	Whether or not there are Categories directly associated with the item in question
Modified Date	The last date that the object in question was modified

© 2020 Interfacing Technologies Corporation

Last Modified By	The name of the last resource that modified the object
Status	View the status of the item in question when Show Latest mode is on
Locked	Whether the item in question is currently locked or not

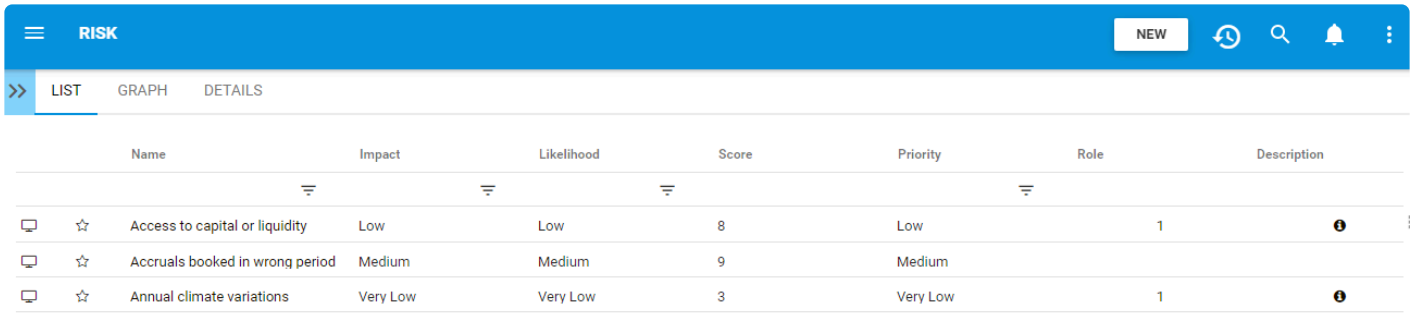
> The selected list view will be saved both by web browser and by user.

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).

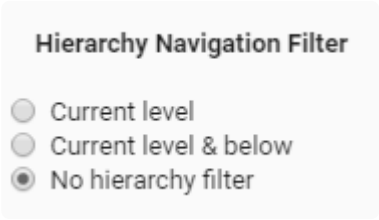


To simplify Risk viewing; users **are not** greeted with all major Risks that they are associated too. Users are greeted with the list of Risk Sets, the highest level of Risk Classification in the EPC. However users can display these risks within the **List View**. Please see the **Optional** steps below:

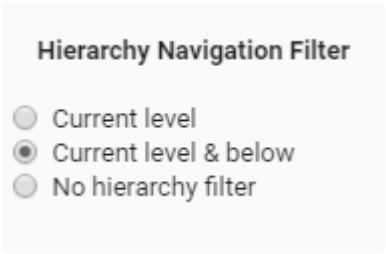
> These steps are only required if a user is using an account or browser for the first time. As noted above, list preferences will be saved by user and browser to simplify navigation.

4. **(Optional)** To view sub-processes,users must select the filter panel and then select “Current level & below of the EPC Web App.

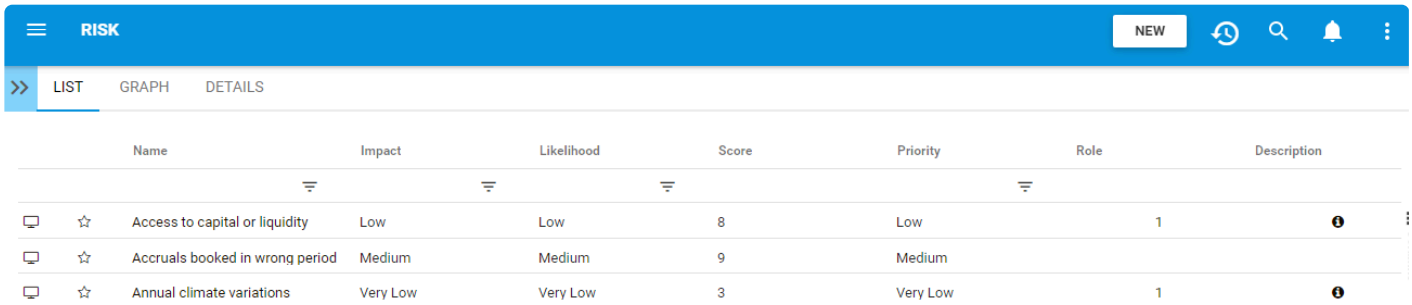
5. **(Optional)** Click on the filter setting and it will generate a list view



6. **(Optional)** Select “Current level & below”



7. **(Optional)** Upon selecting the “Current level & below”, the EPC will automatically refresh the page



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

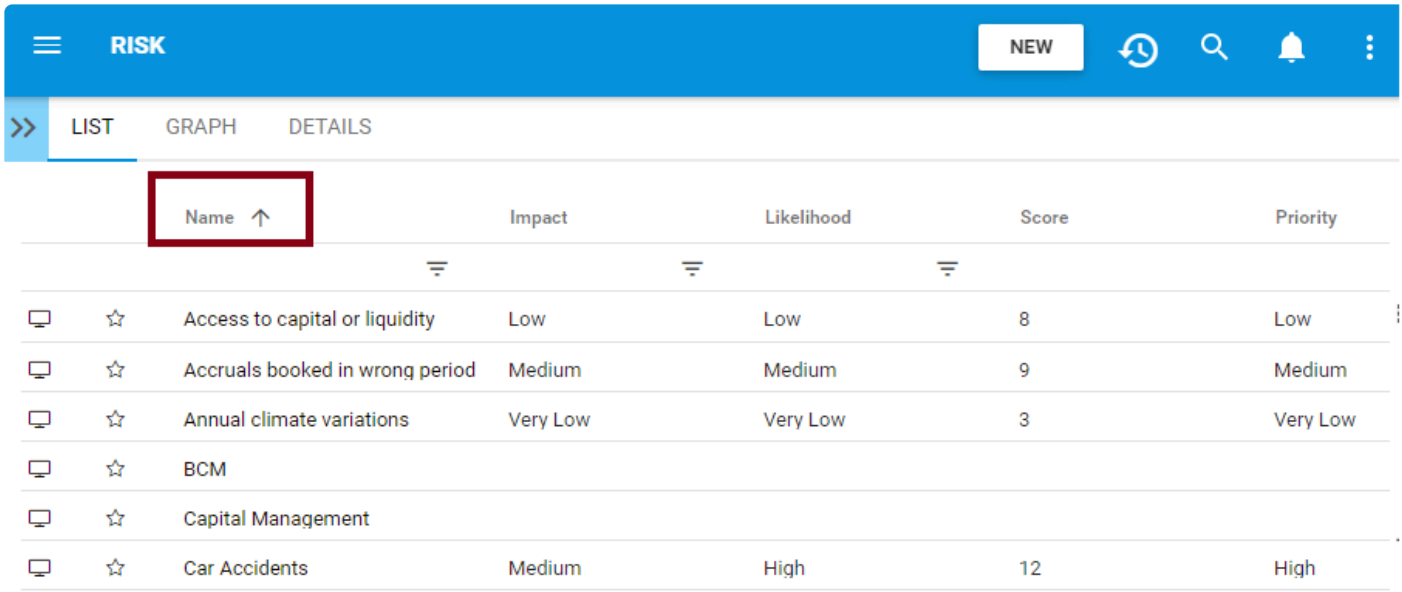
1. Navigate to the Rule Module

2. Navigate Cursor to desired **Category**

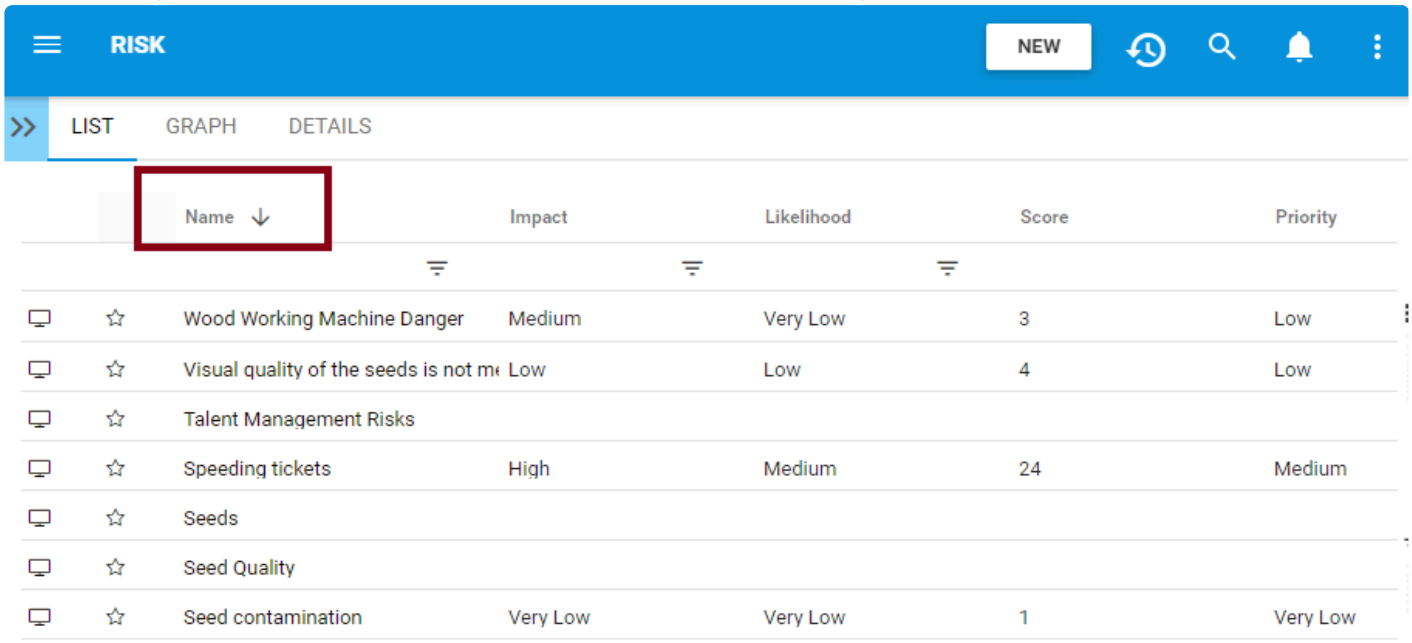
3. Click on the **Category**

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.



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



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
Identifier	Empty – The object does not have a unique identifier Not-Empty – The object has a unique identifier
Detectability	Empty – The object does not have a detectability value Not-Empty – The object has a detectability value
Child Risks	Empty – The object has no risk associated Not-Empty – The object has at least one associated risk
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
Documents	Empty – The object has no associated documents Not-Empty – The object has at least one associated document
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

Subtype	Empty – The object does not have a business type associated Not-Empty – The object has at least one business type associated
Categories	Empty – The object has no category associated Not-Empty – The object has at least one associated category
Modified Date	The specific dates that things have been modified by
Last Modify By	Textual search of last resource who last modified an object
Status	Shows the status of the item in question (published vs in-progress) Sent for Approval Approved In Progress Published Rejected Revised Sent for Review Under Revision
Locked	False – The object isn't locked True – The object is locked

The Filtering section will cover the following:

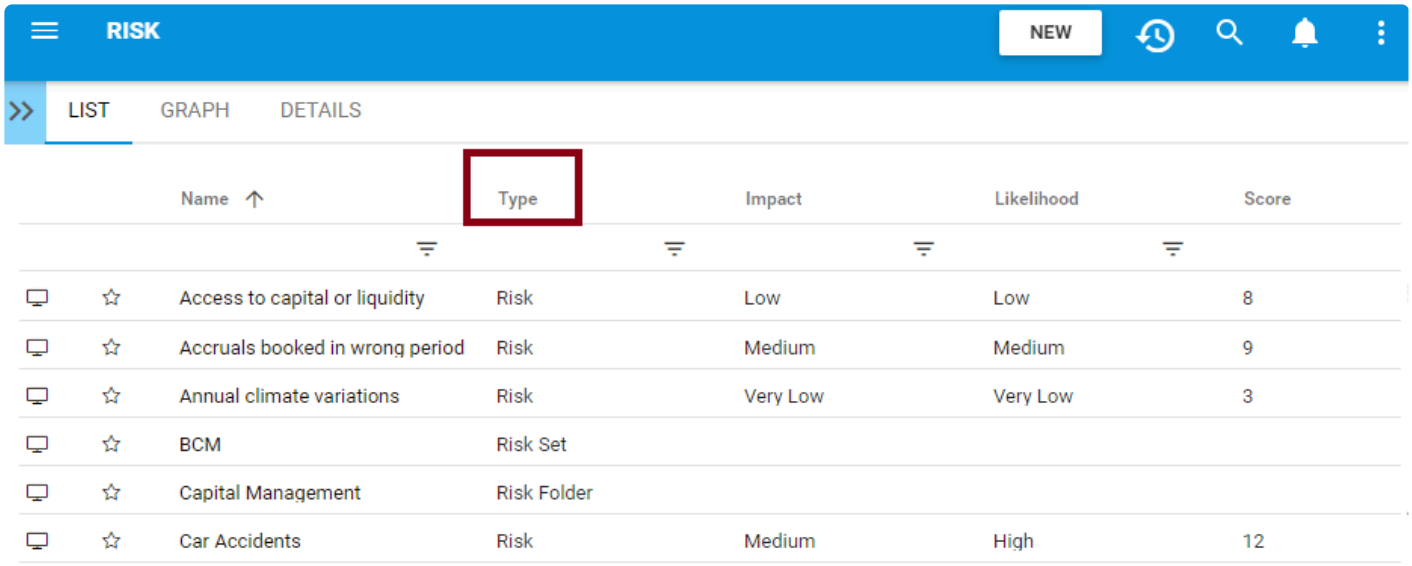
1. How to Add Filters
2. How to Remove Filters
3. How to Combine Filters

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.**

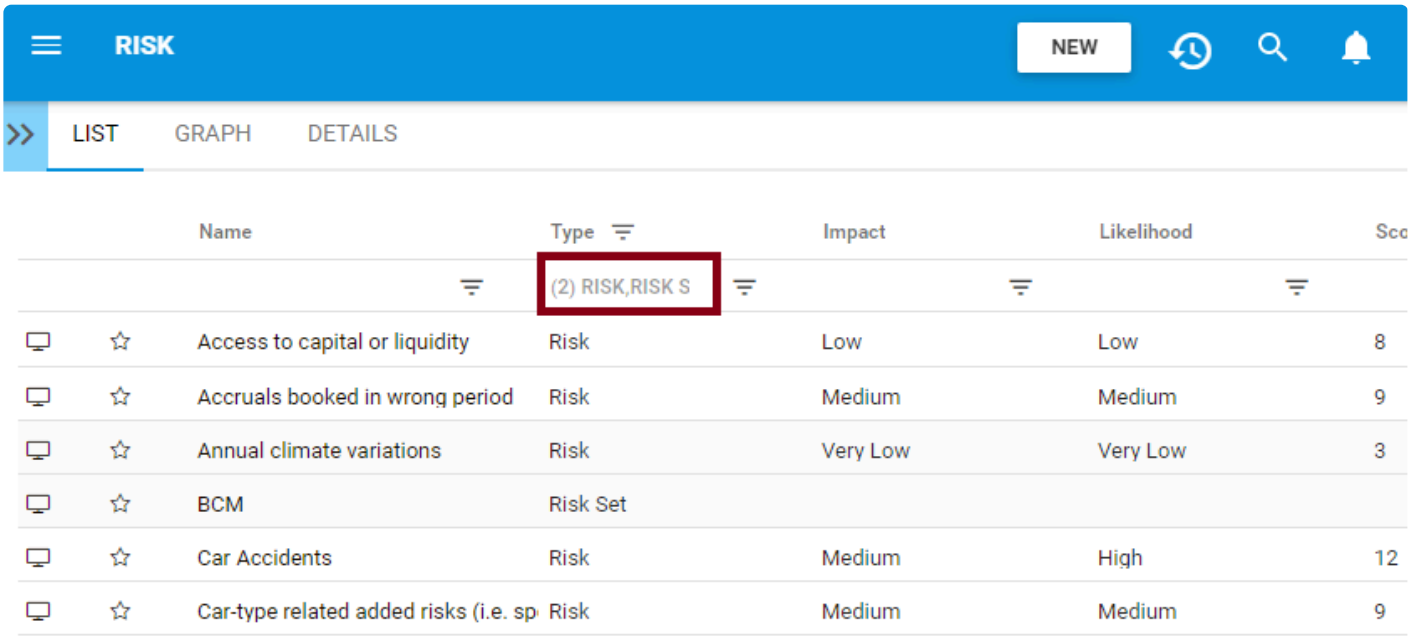
How to Add Filter

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



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

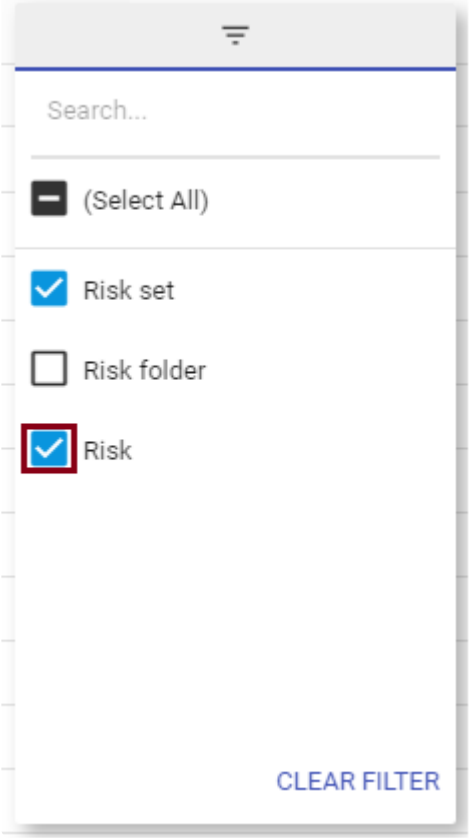
3. Select the desired filter. For this example, we will select **Risk** and **Risk Set.**



4.8.2.2.2 Remove Filter

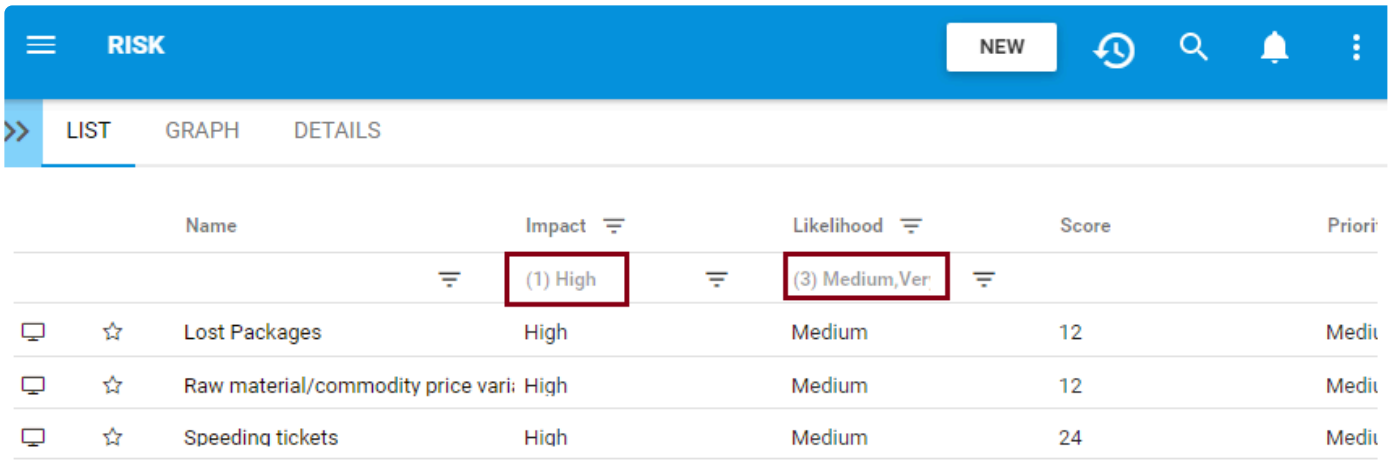
You can remove filters; this will naturally increase the results in your list.

Click on the button beside the filter name.



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.**



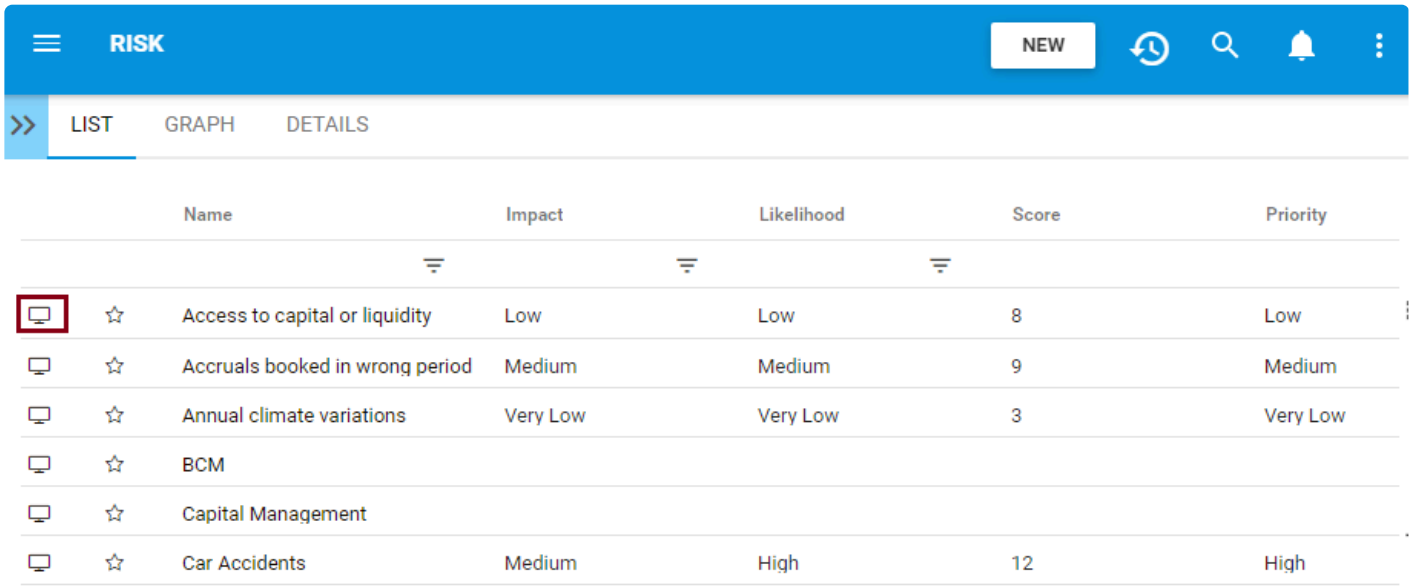
4.8.2.3 Quick Graph View

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".

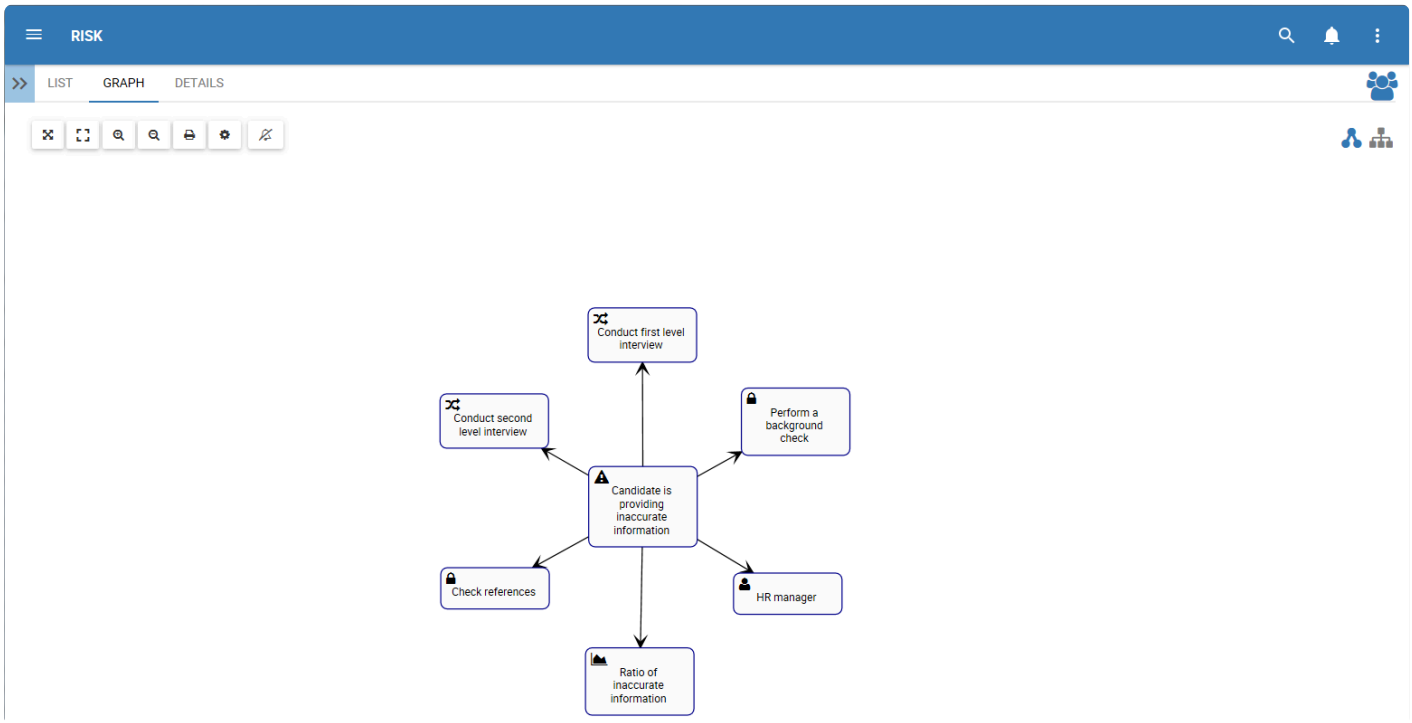
Please see the instructions below:

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.



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.

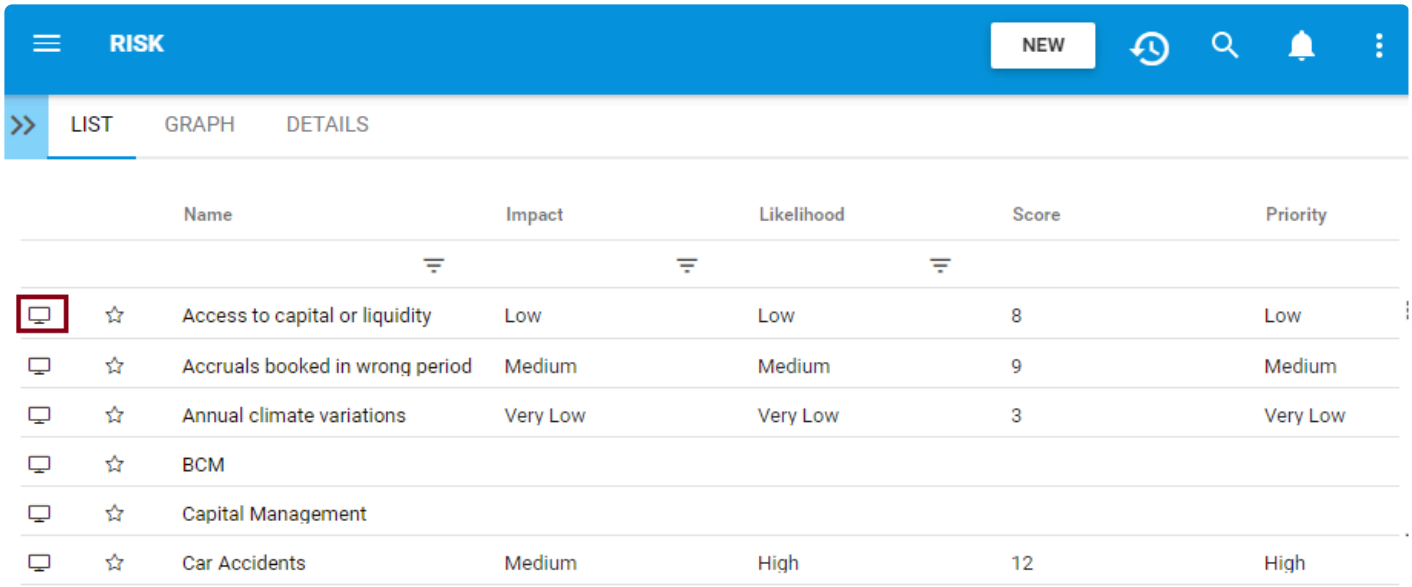
How to navigate to the Graph section (Manual Navigation)

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

2. Click on **Risk**

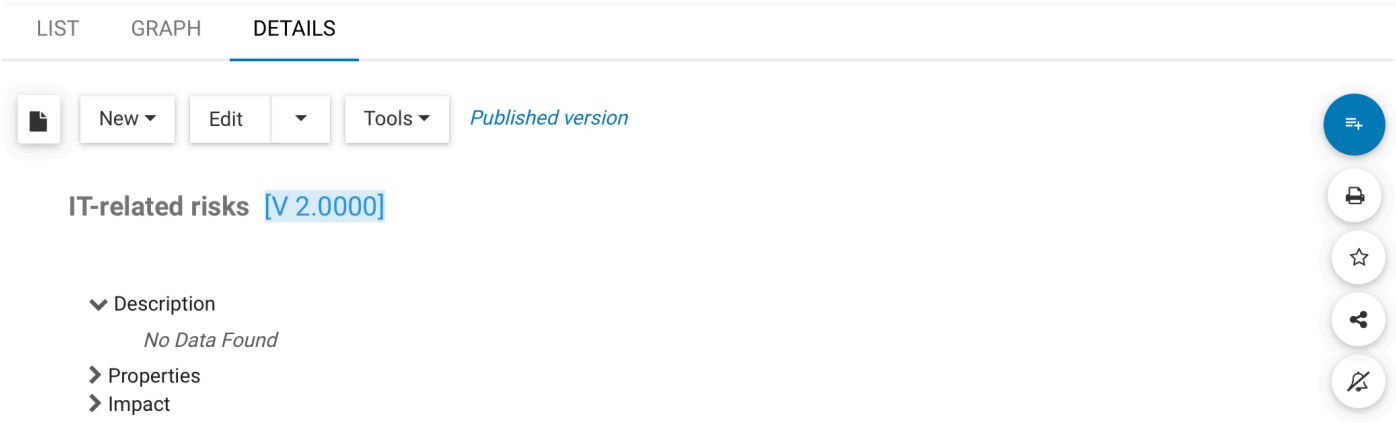
3. By default, you will be directed to **List View** in the Risk module.

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

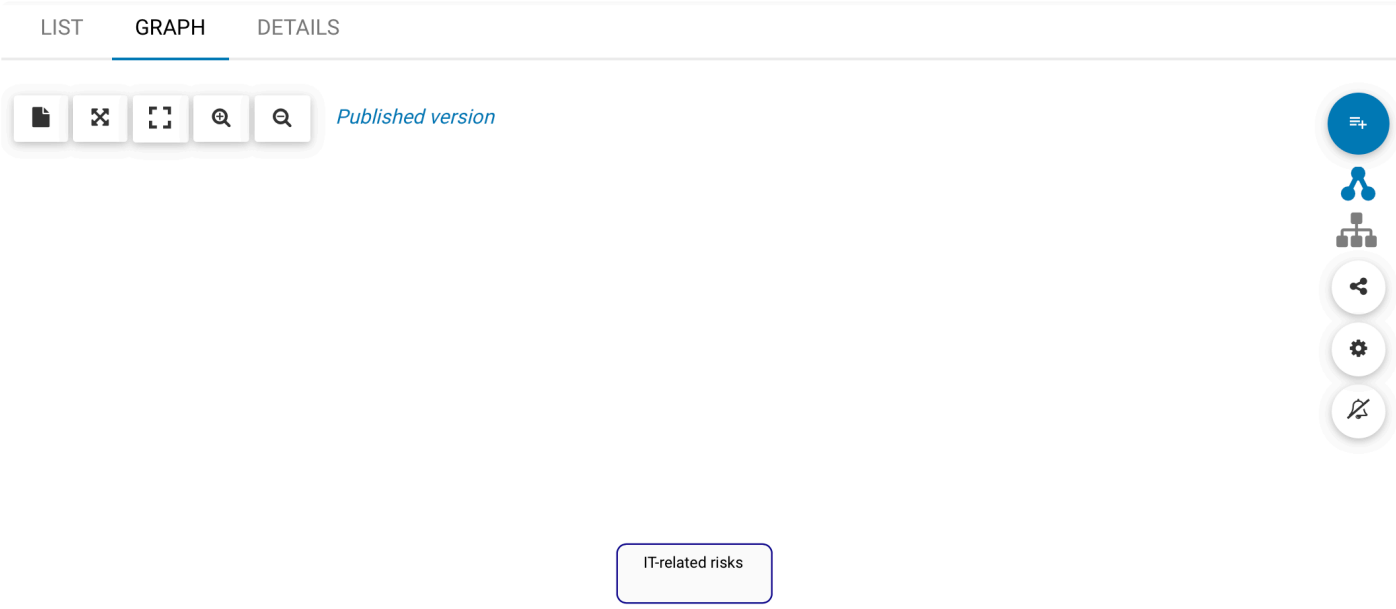


5. You will be prompted to the item’s details page

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

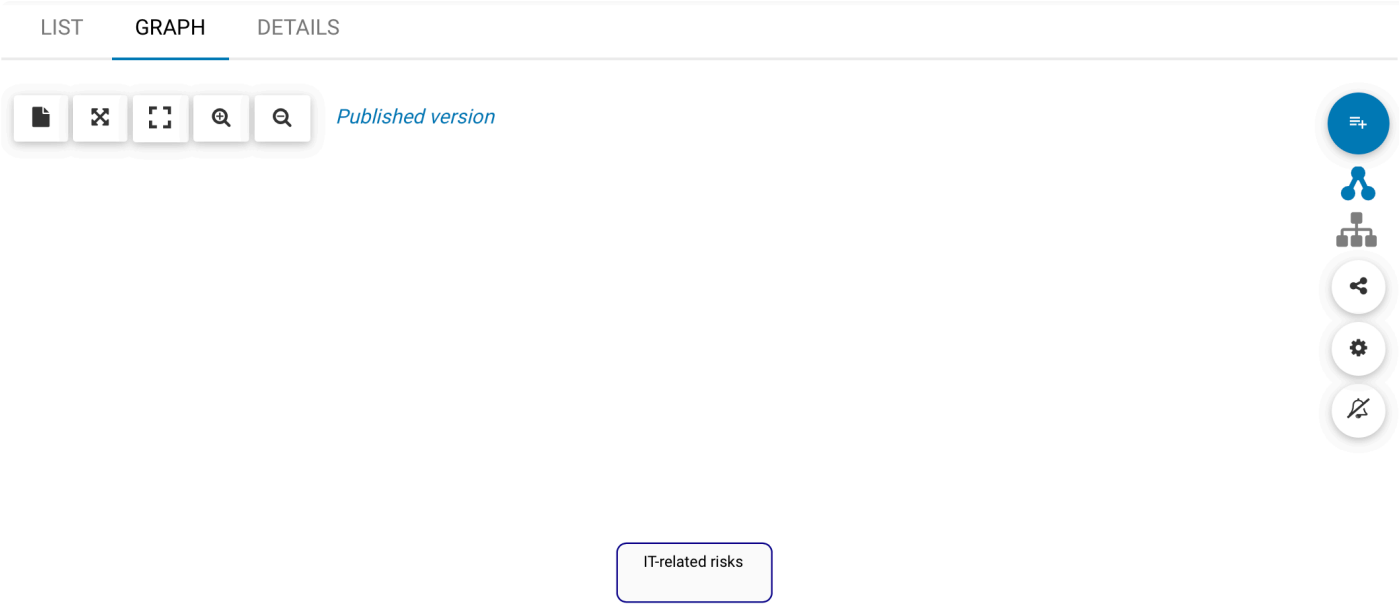


7. You will be navigated to the Graph section. By default, users will be sent to Impact view as the default Graph view. An example of this view can be seen below.



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
Object Book		SOP process book generation
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

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
Share		Copies URL to user's clipboard to share
Settings		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.

4.8.3.1.1.2 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 for instructions.

4. Click on button and the page will be reset

4.8.3.1.1.3 Full Screen

The full 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

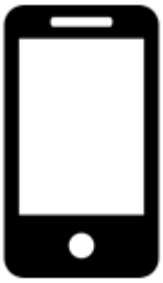
4.8.3.1.1.4 Zoom in

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.

4.8.3.1.1.5 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

Coming Soon

4.8.3.1.1.7 Settings

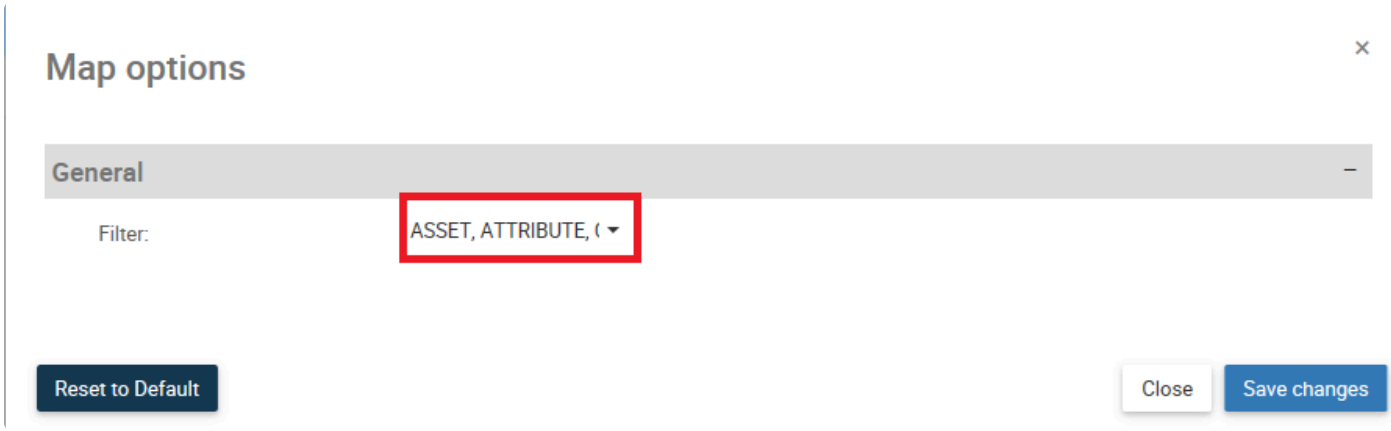
The Settings button has been added to allow users to customize the Graphs they view. Customization allows users to select exactly what is displayed in each graph, allowing them to prioritize key information in a format of their choice.

This section will cover navigation to the settings button.

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 drop-down menu will be generated

4. Select the desired filter and select “Save Changes”.

4.8.3.1.1.8 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.

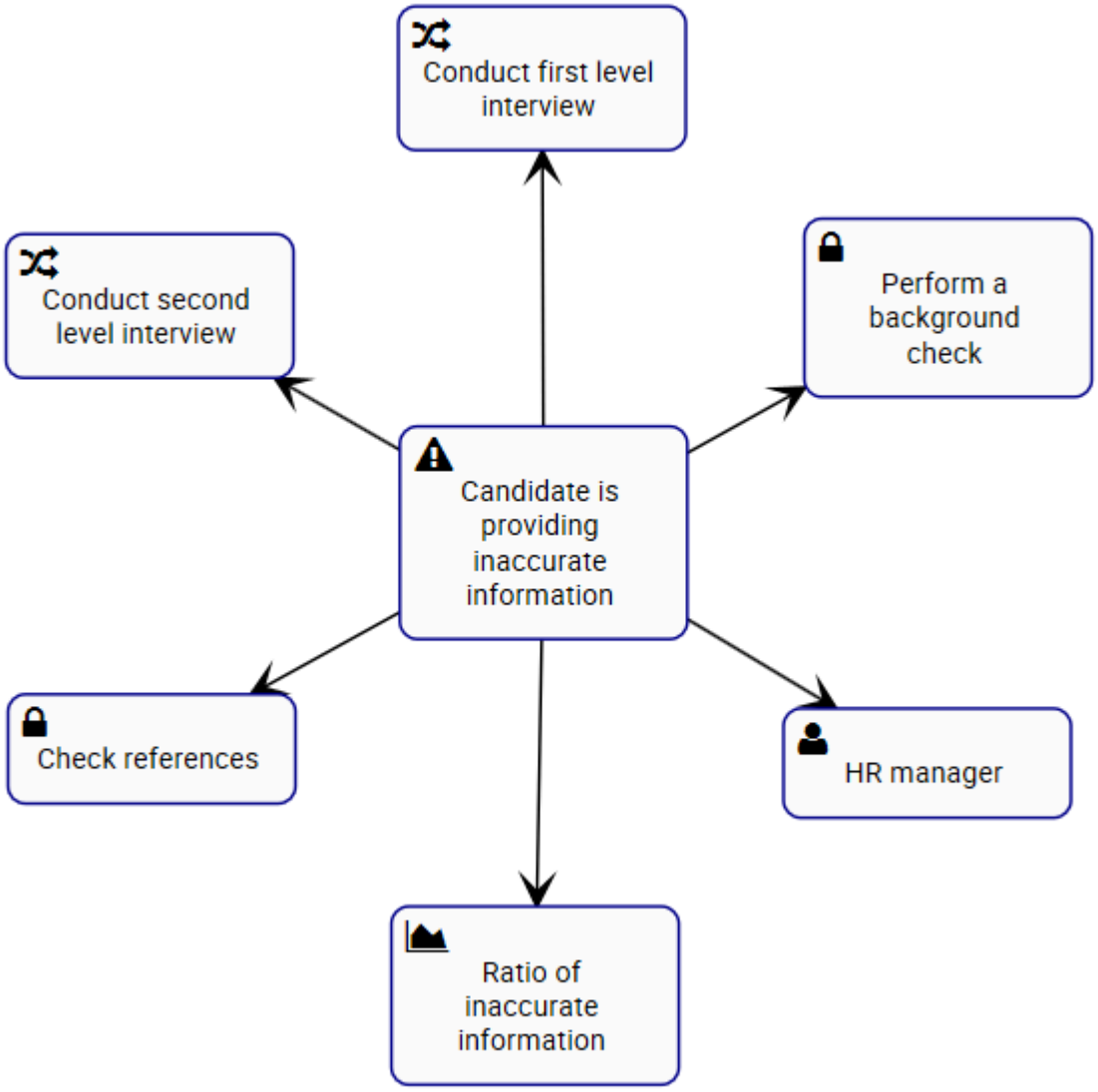
To use the Subscribe button, please see the following instructions.

1. 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

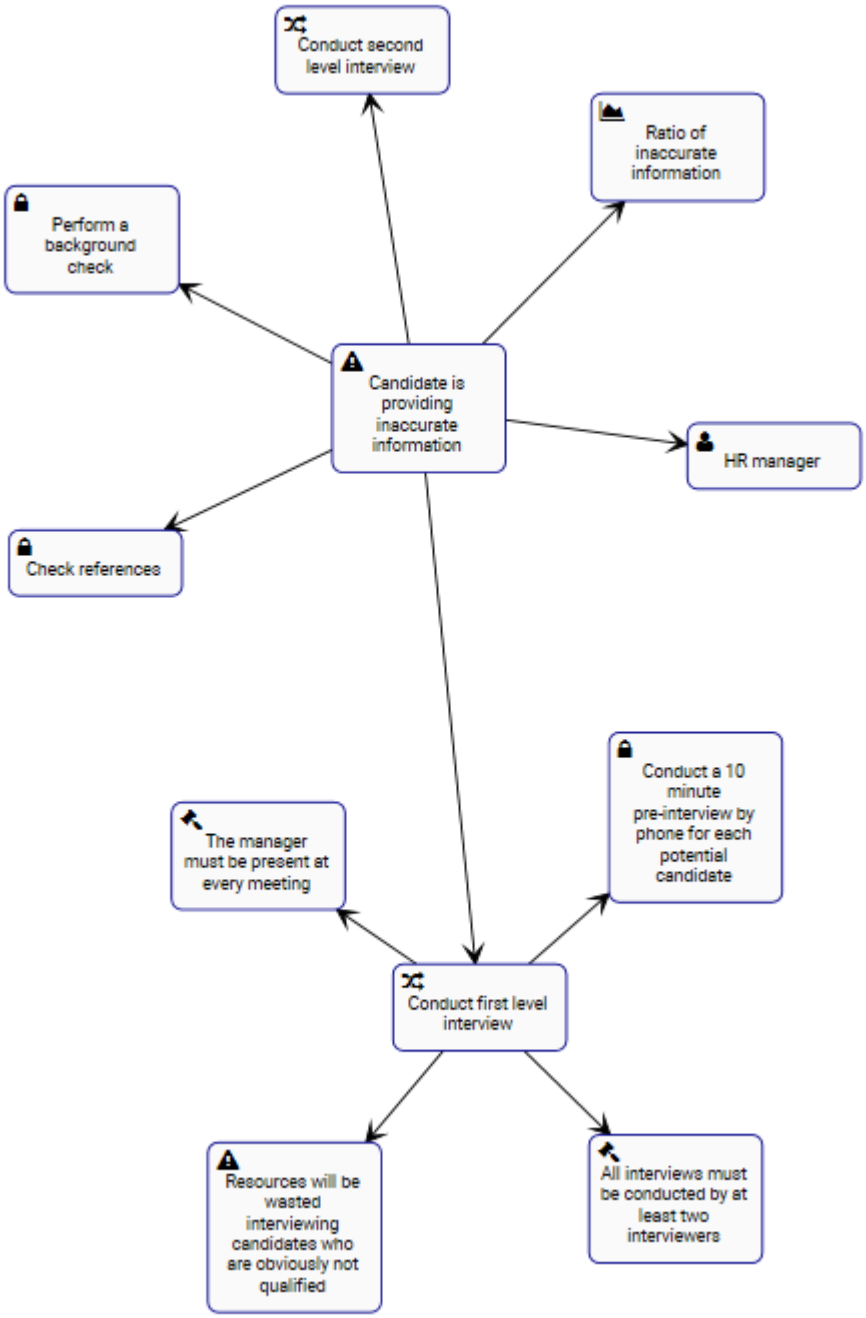


The example features the Impact Graph of the Risk “Candidate is providing inaccurate information.” The Risk itself is associated to a Role “HR Manager”, to two Controls “Perform a background check” and “Check references,” to a Key Risk Indicator “Ratio of inaccurate information” and to two tasks “Conduct 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

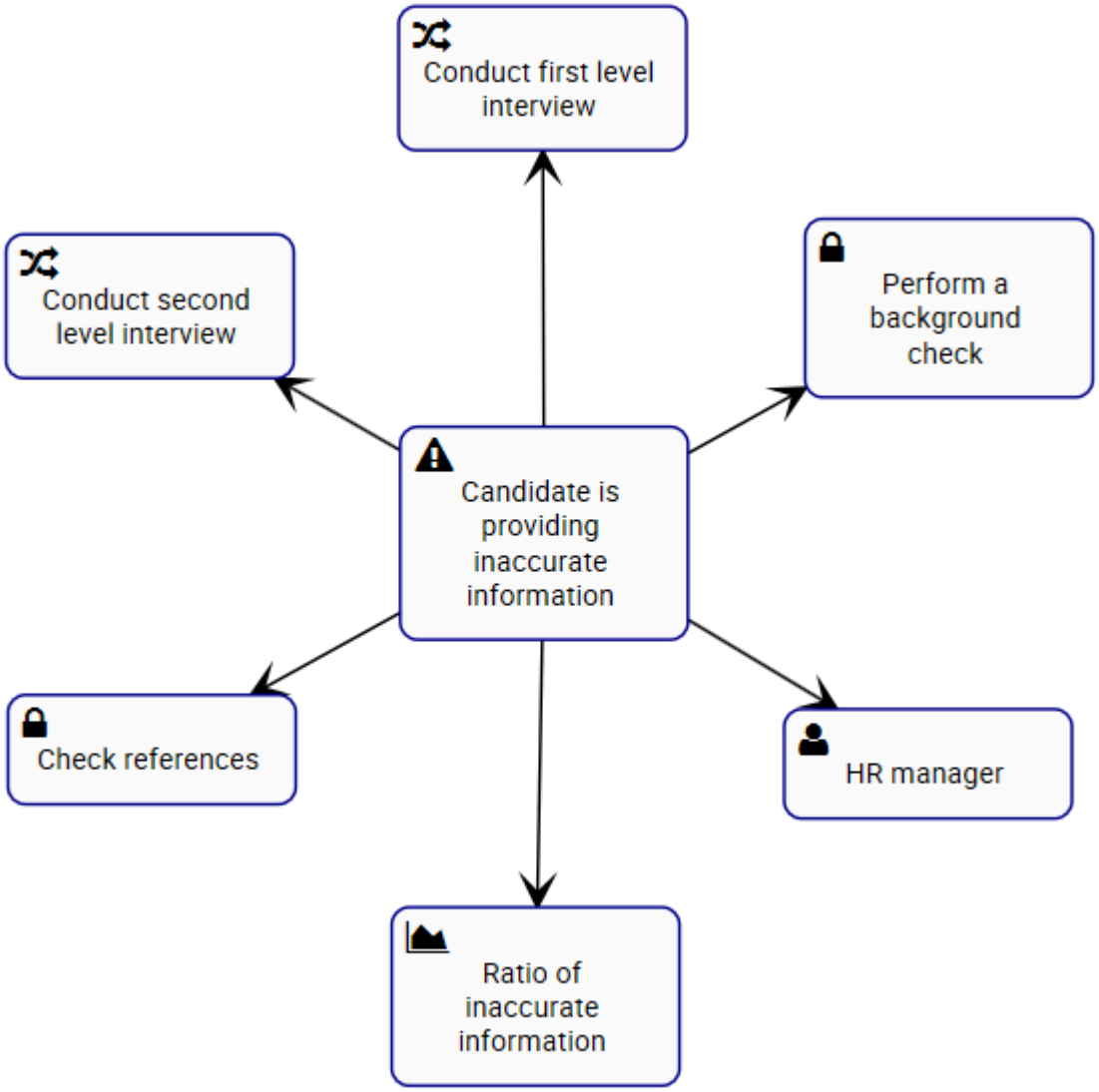
Impact Graph Navigation

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

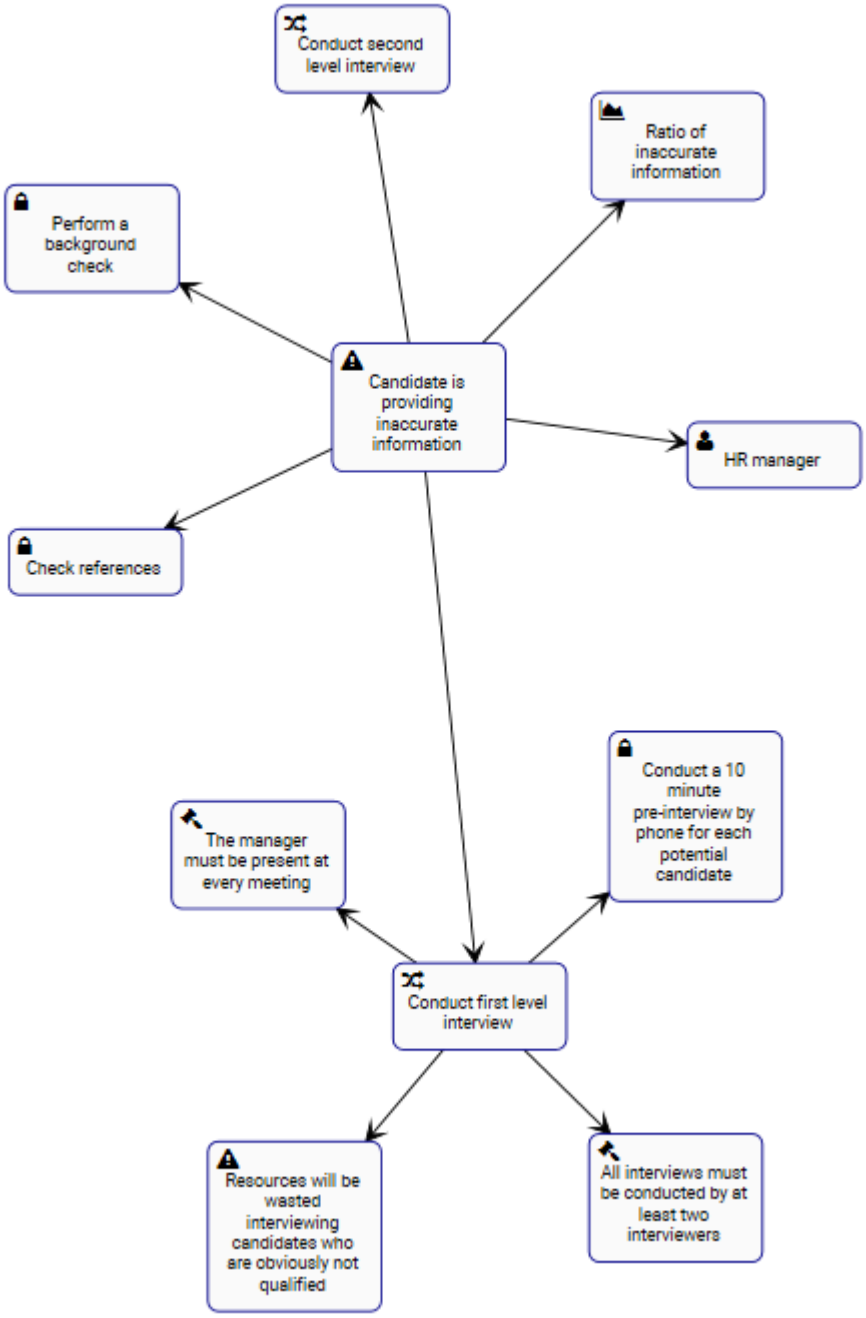
1. Navigate to a Risk within the Risk Module

2. Click on the Quick Graph View icon

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



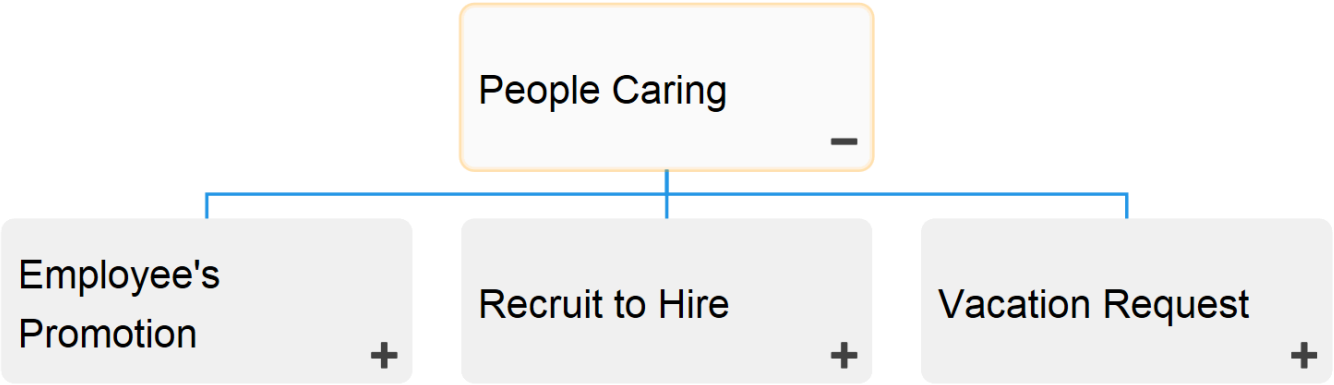
4. (Optional) To further expand the Impact Graph, simply double-click on the item to which you would like to display


Conduct second level interview
Ratio of inaccurate information
Perform a background check
Candidate is providing inaccurate information
HR manager
Check references
Conduct a 10 minute pre-interview by phone for each potential candidate
The manager must be present at every meeting
Conduct first level interview
Resources will be wasted interviewing candidates who are obviously not qualified
All interviews must be conducted by at least two interviewers

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

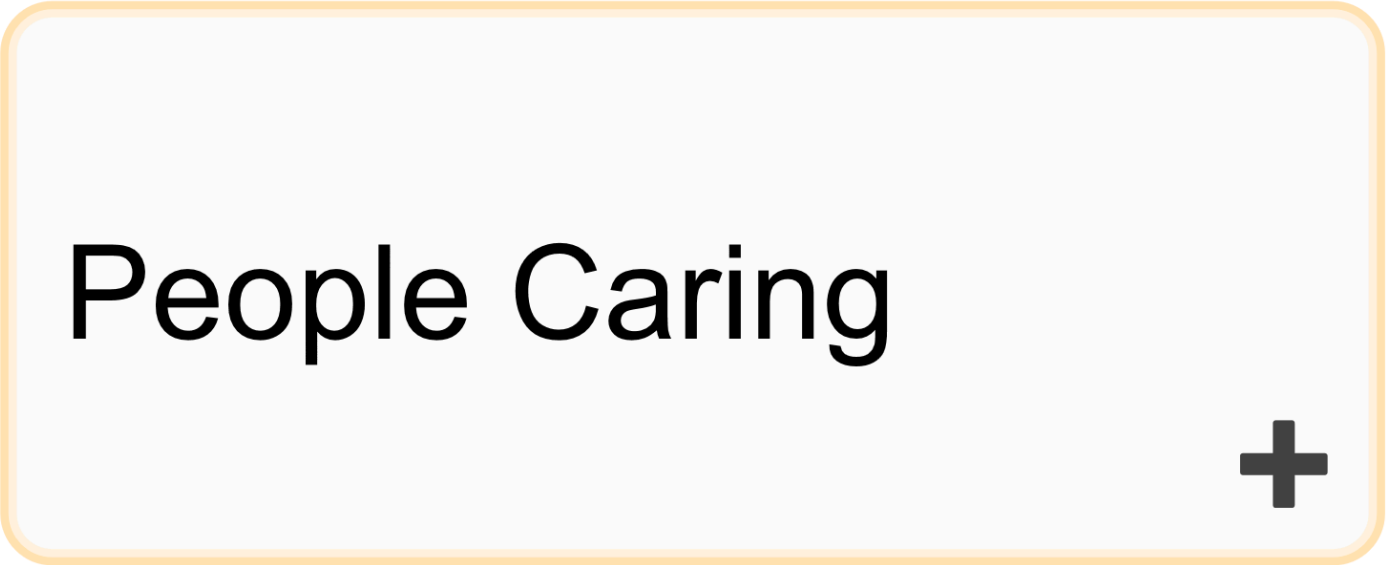
2. Select the item to which you would like to view.

> 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

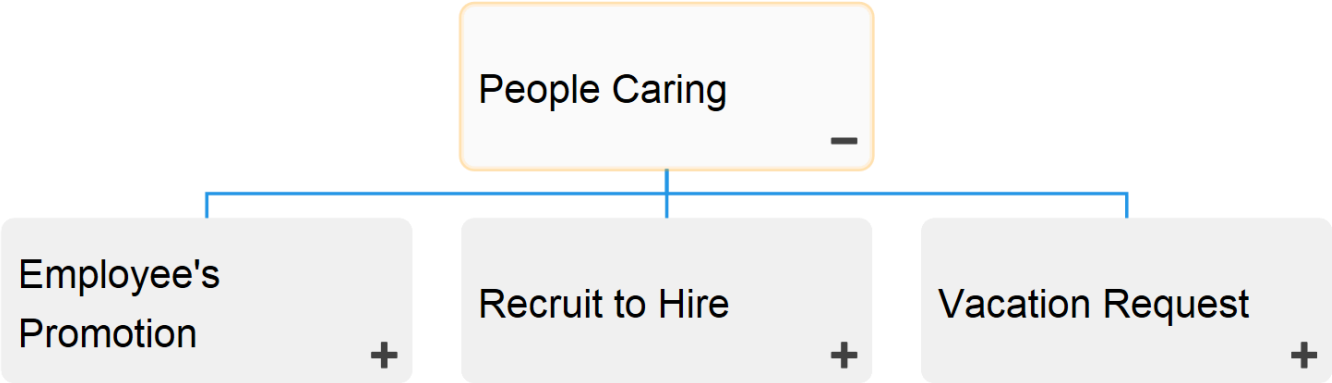
3. Select the Quick Graph View icon of the desired item

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.

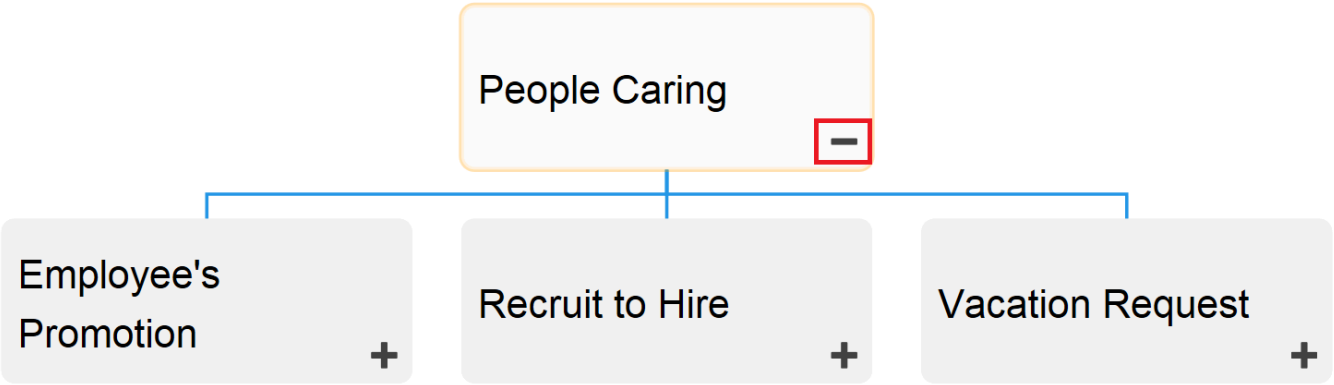


6. To further expand components of the Hierarchy Graph, double click on the on the objects in the Graph. This will expand the item selected.



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

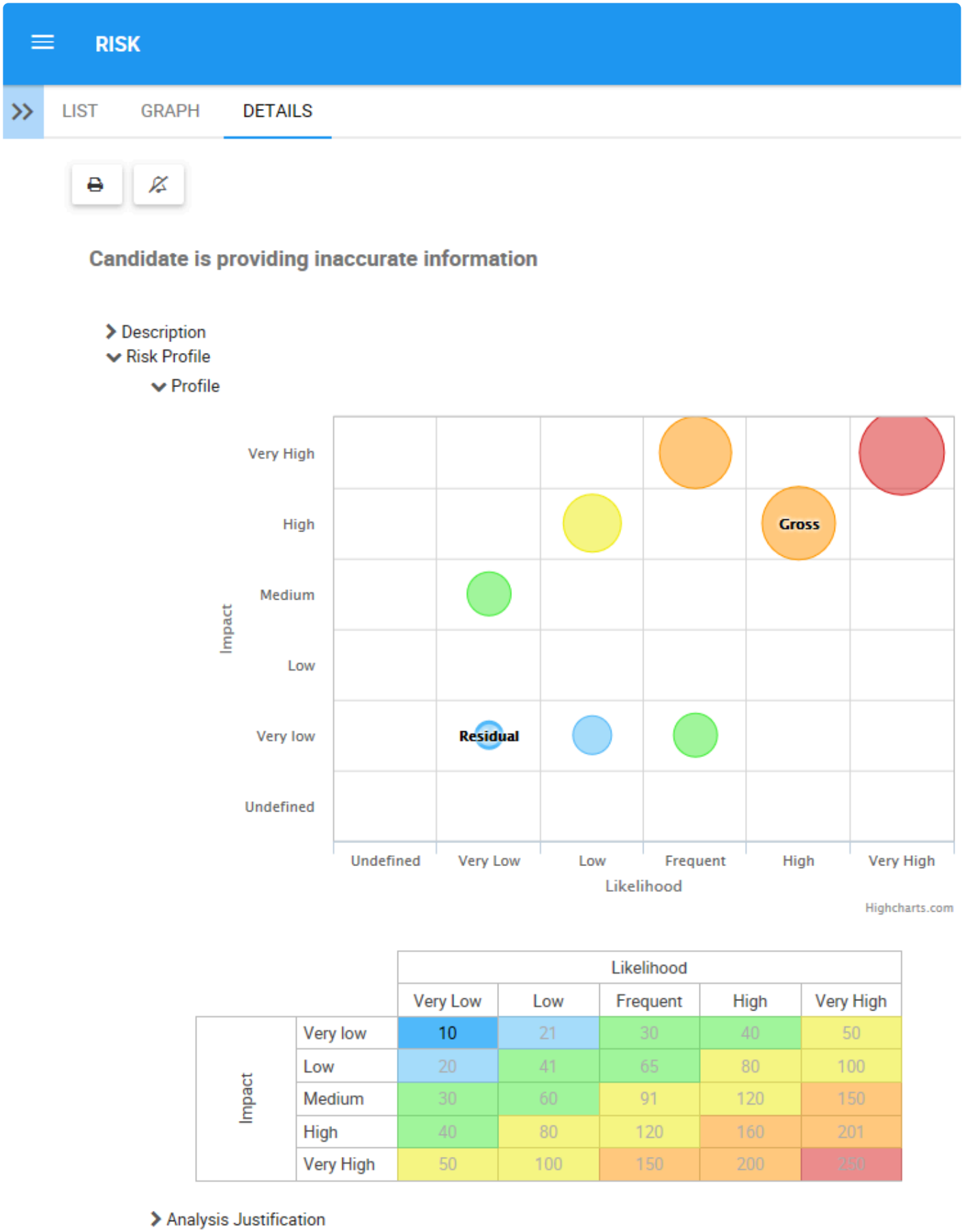
8. To close opened items, double-click on the icon


People Caring
Employee's Promotion
Recruit to Hire
Vacation Request

4.8.3.4 Risk Profile Graph

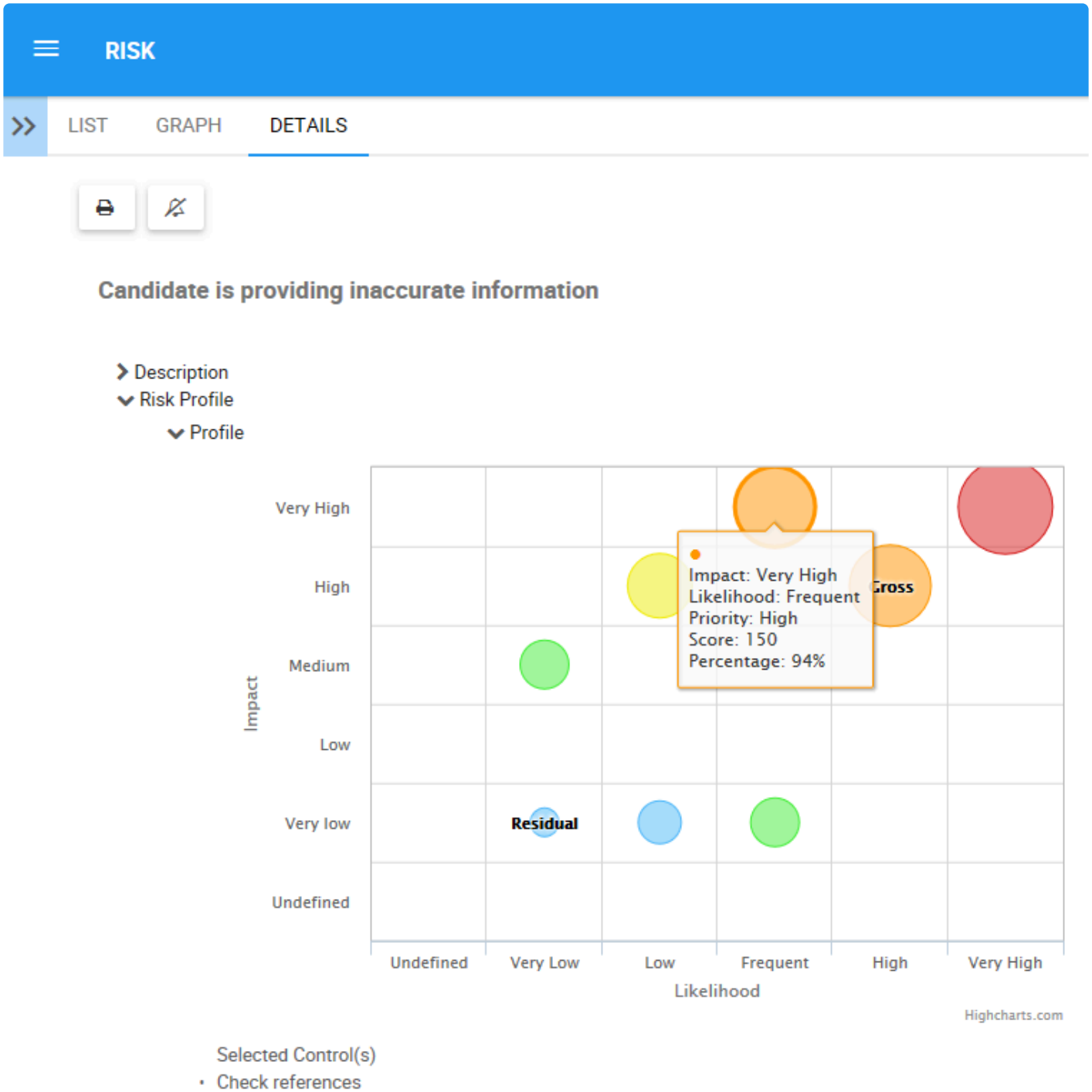
The Risk Profile graph is an interactive map that allows users to get a comprehensive view on a risk and controls applied. The Risk Profile graph is located under the Details section for a graph. The Risk Profile section displays two subsections, one called “Profile” and the other one “Analysis Justification.”

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.



		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

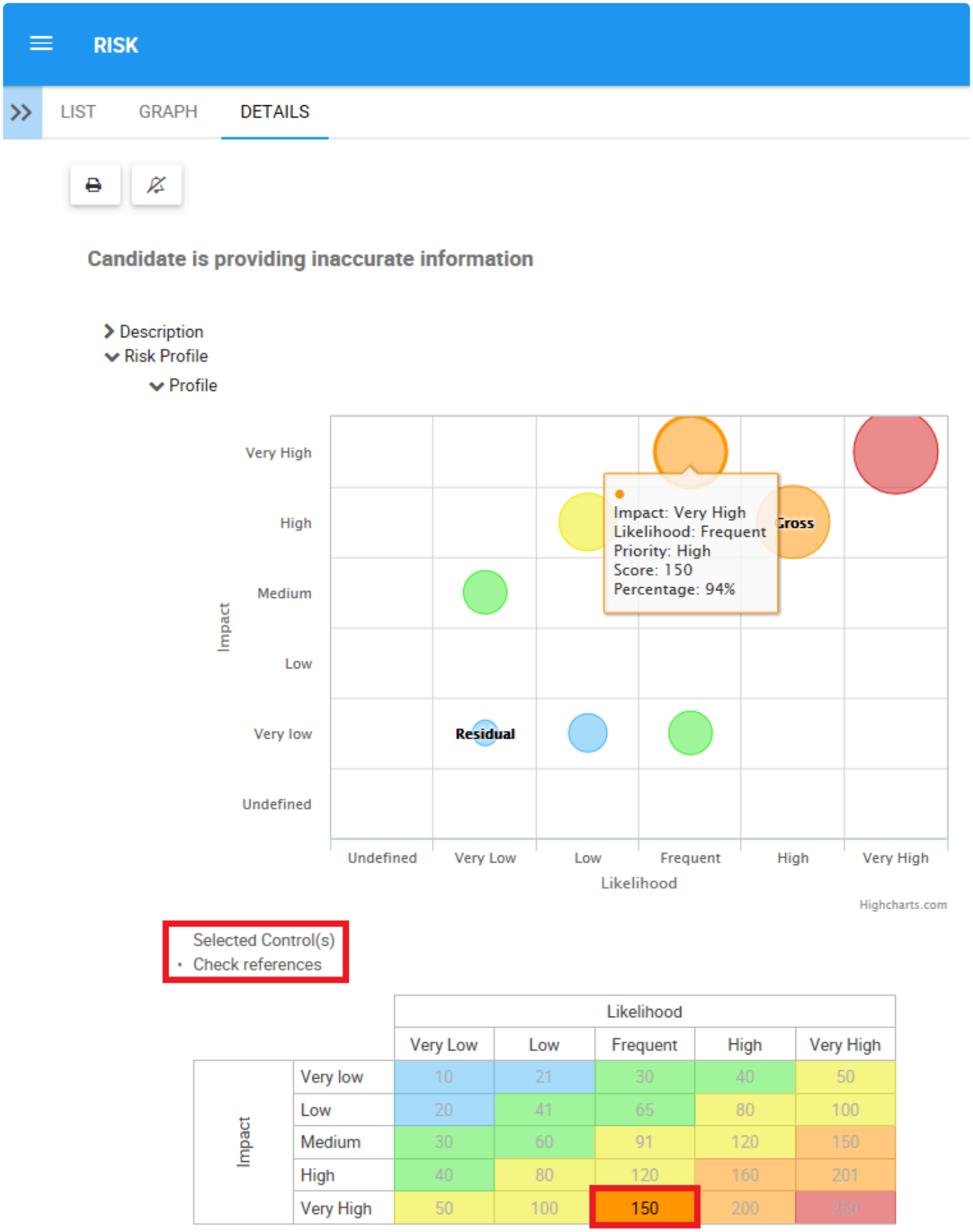
The Risk Profile graph allows users to visualize and analyze how a Risk should be managed. On the graph, risks and controls are displayed with nodes along two dimensions. By clicking on the node, the user will obtain information concerning its type (Gross risk, residual risk, control), its impact, its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



		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

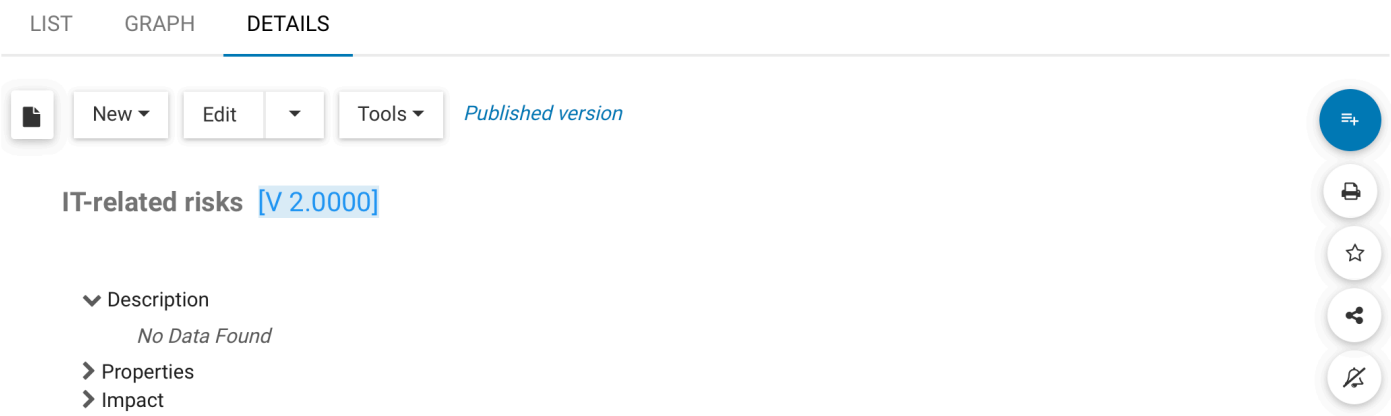
Matrix highlighting its overall score, its impact, and its likelihood. When a control is selected, the control's name will be displayed on top of the Risk Matrix. The score given is calculated depending on which priority is given by the modeler for the impact and likelihood of the risk or control. The 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.



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

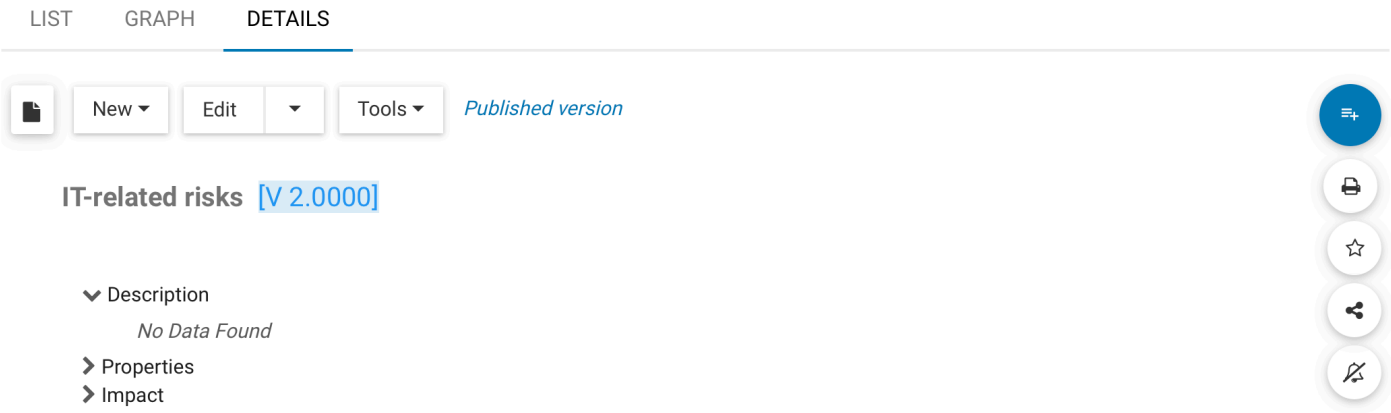
4.8.4 Details

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.



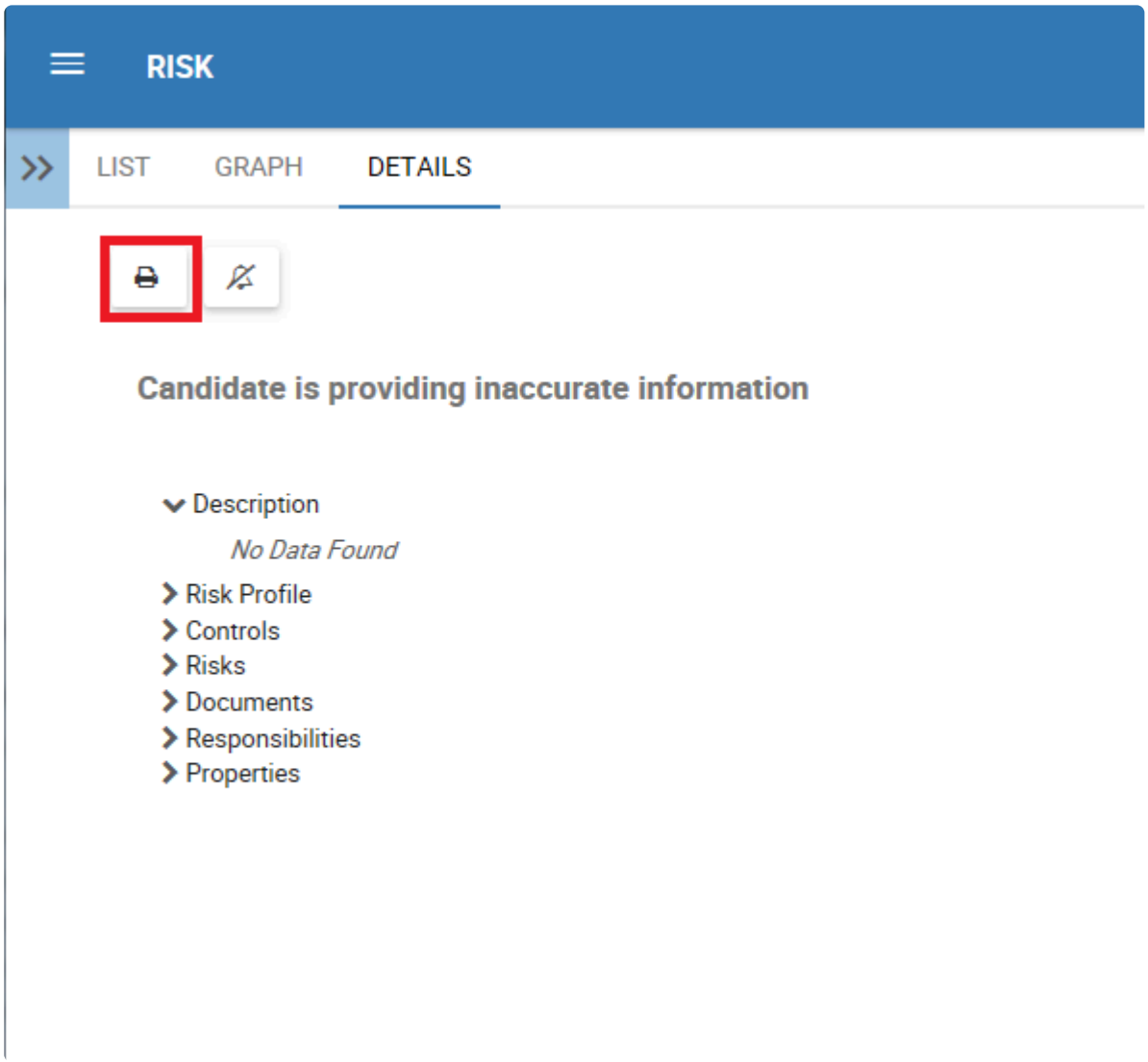
4.8.4.1.1 Toolbar

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
Favorite		Allows users to sort by favorites in the “My Actions” widget
Share		Copies URL to user’s clipboard to share
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.



4.8.4.1.1.4 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 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.

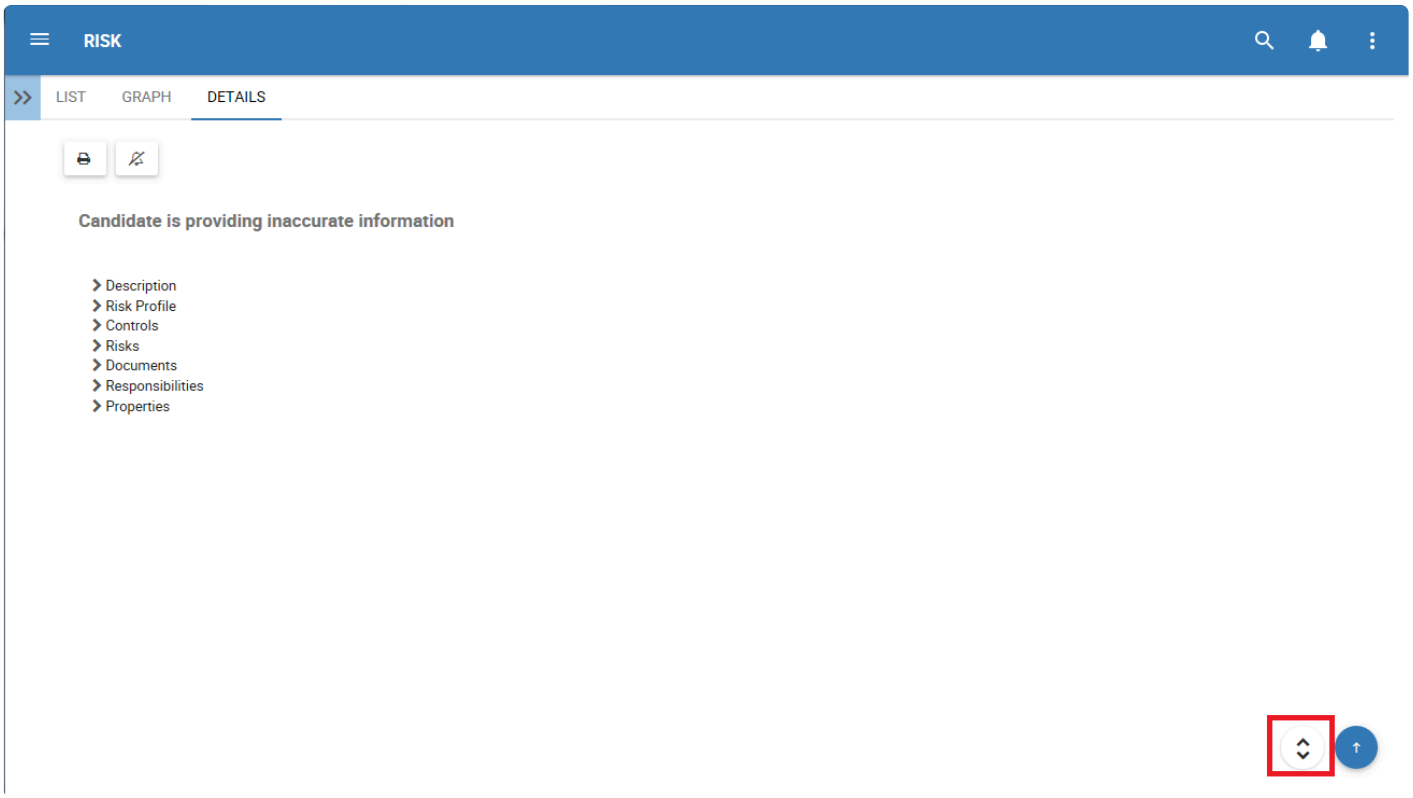
Risk Details display the following content

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

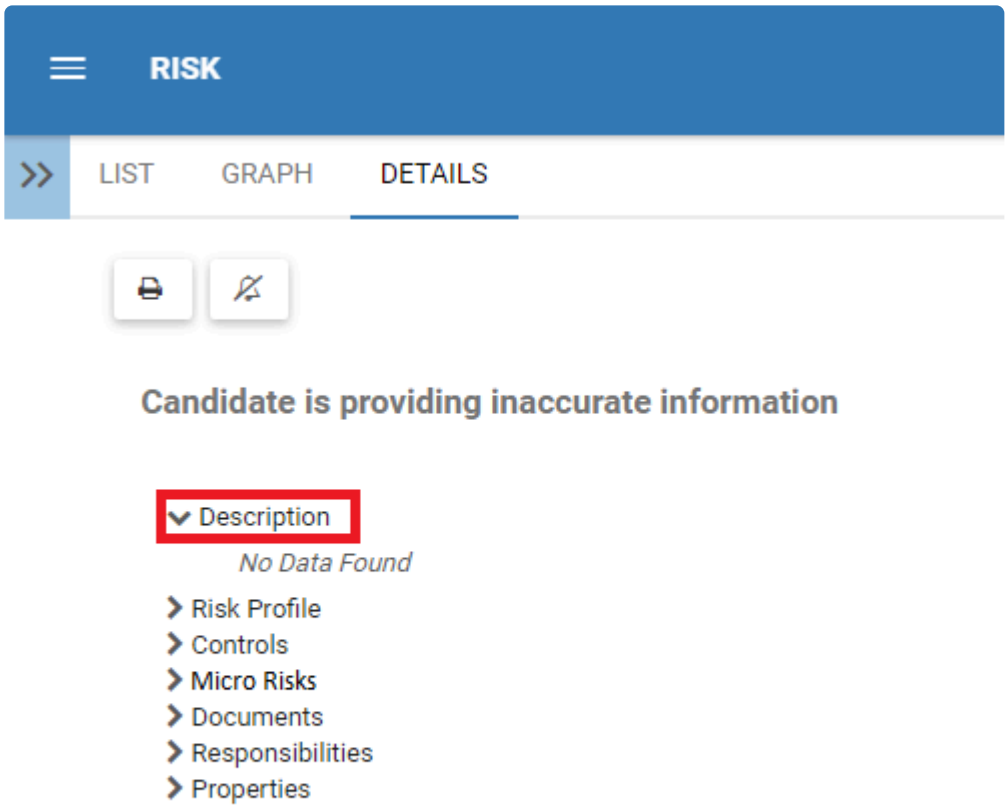


* Selecting different items will result in different information being displayed. The above components specifically relate to the information that will be provided for items.

* 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.



4.8.4.2.2 Risk Profile

To understand better the Risk Profile section, read Risk Profile Graph.

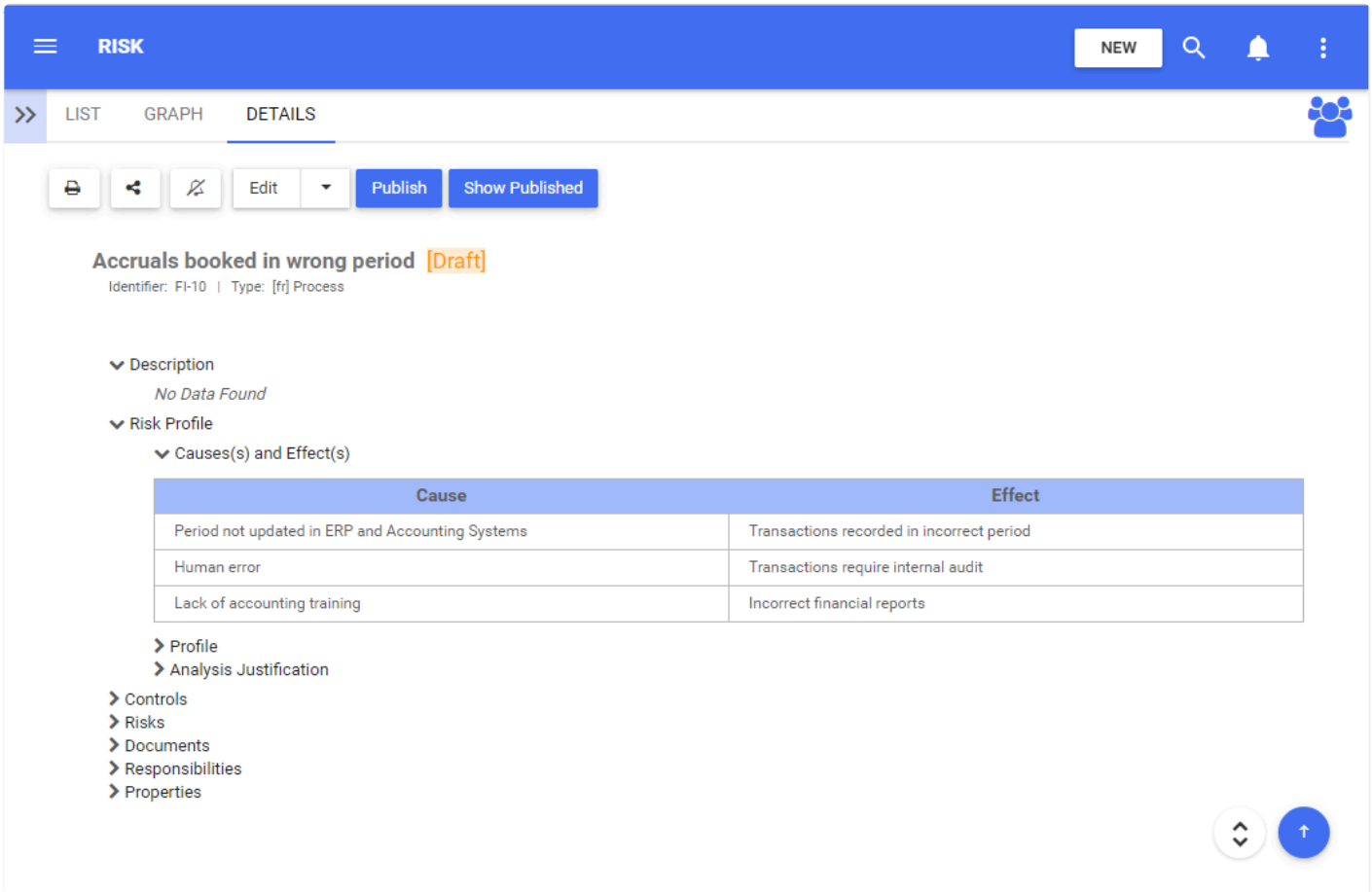
4.8.4.2.2.1 Cause & Effect

EPC users can view the cause & effect of risks within the details page. These causes & effects are presented to users in a table, allowing them to view and track critical risk information.

Highlighting Cause & Effects will allow your Team to:

1. Allow your risk managers to analyze and prioritize risk mitigation
2. Communicate important information to your users

These causes & effects, inputted by EPC modelers, can be viewed by expanding the “Cause(s) and Effect(s)” section on Risk Details pages.



4.8.4.2.2.2 Detectability

A risk's degree of detectability is defined as the likelihood of detecting a risk's occurrence. When used, this score is multiplied with the risk's impact and likelihood scores to produce a 3-dimensional score.

> Note: dectatability is not a mandatory field. If this data is not entered, the risk's score will be the product of the impact and likelihood scores.

Residual detectability can be found between the two graphs in the Risk Profile section:

		Likelihood				
		Very Low	Low	Medium	High	Very High
	Very Low	1	2	3	4	5
	Low	2	4	6	8	10

4.8.4.2.3 Controls

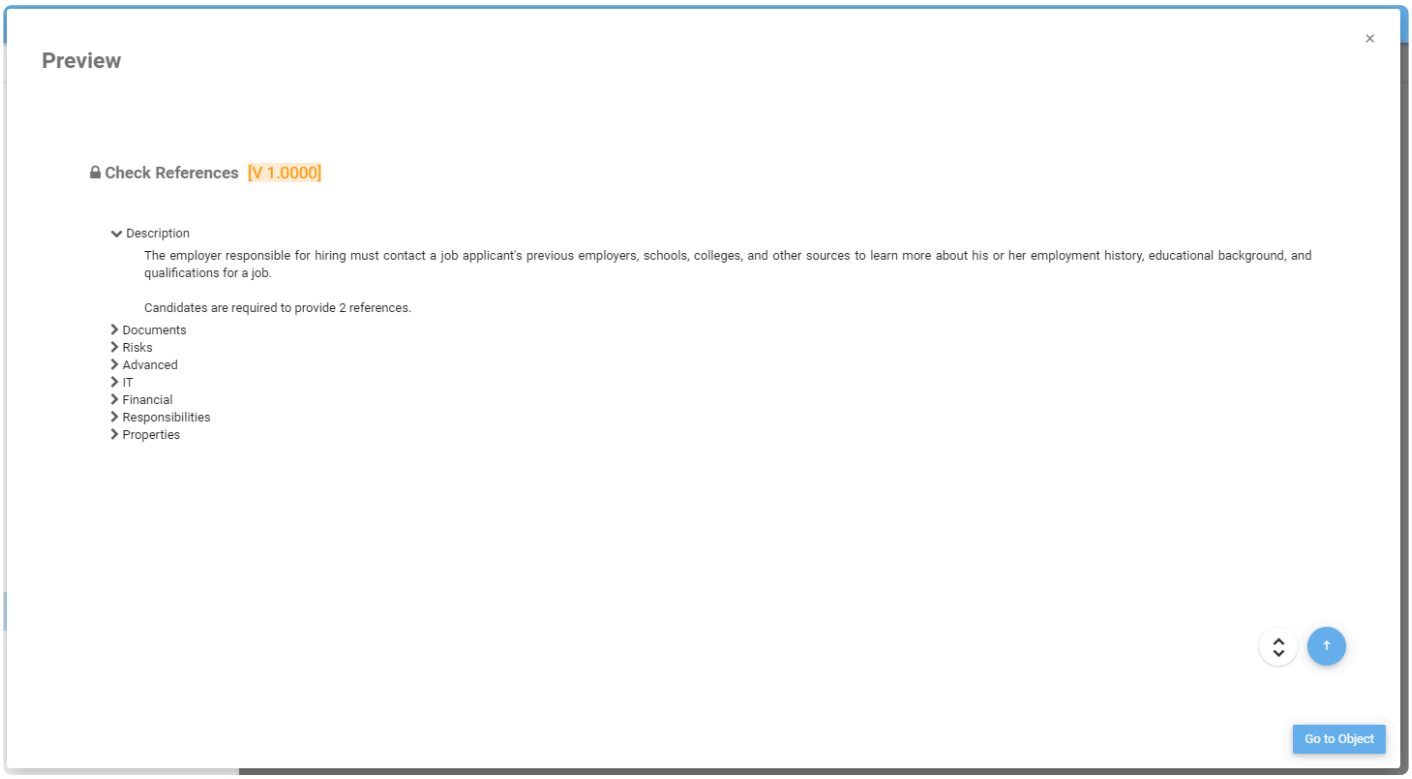
The Controls section displays the controls associated to the Risk.

To navigate directly to the object, click on the icon.

Controls

Candidates that have met qualifications in interviews are given specific performance tests
Check References
"Perform a background check

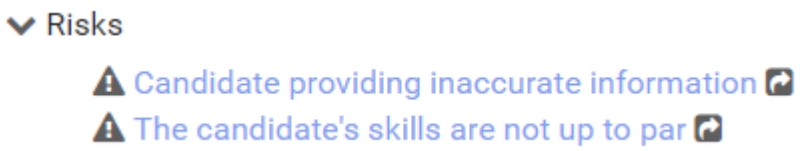
Users can view a control's details in a popup by clicking on its name. To navigate to the control's detail page, click on **Go To Object**



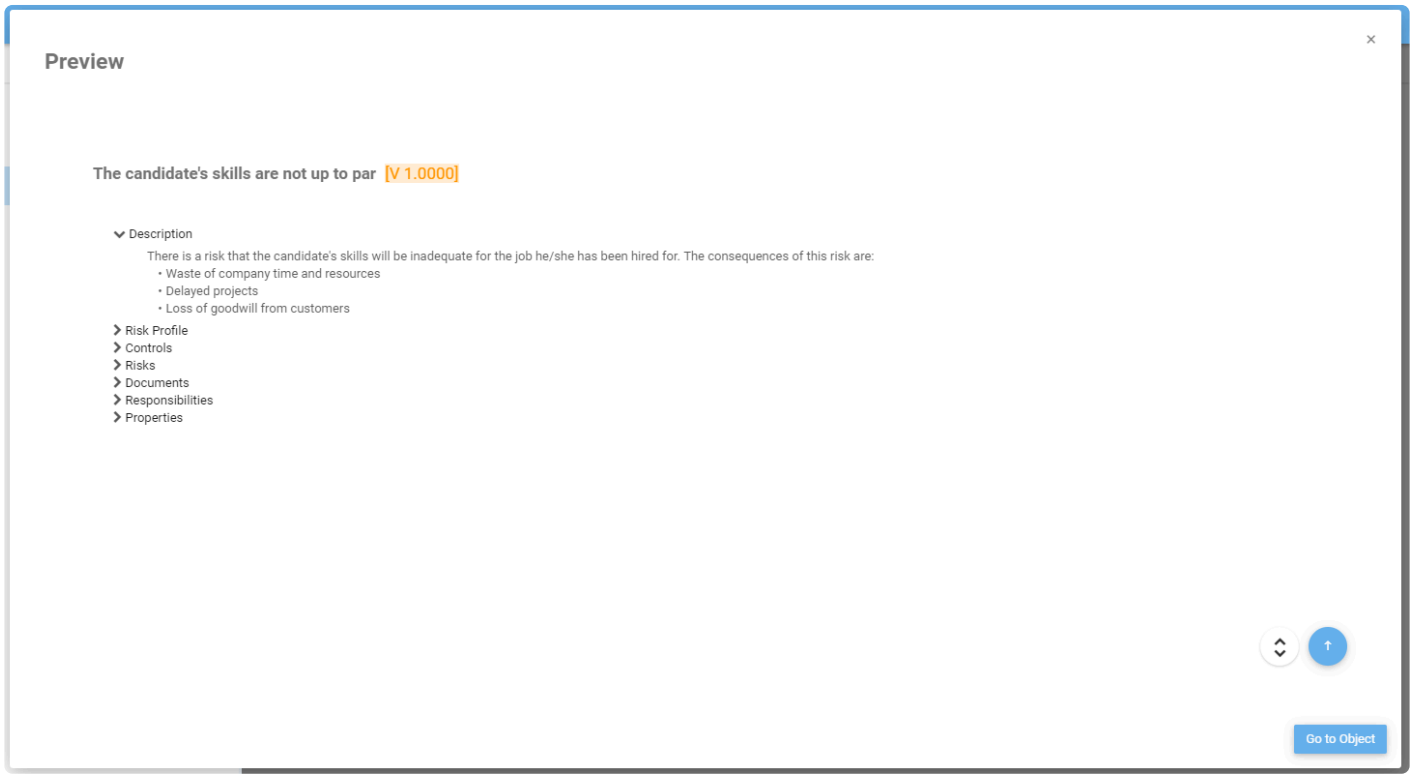
4.8.4.2.4 Micro Risks

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

To navigate directly to the object, click on the icon.



Users can click on the risk's name to view its details in a popup. To navigate to the risk's detail page, click on **Go To Object**



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 at the ability to directly access these documents. Users are additionally provided details regarding the document type (docx, pptx, URL, xlsx, etc.)

To navigate directly to the object, click on the icon.

Users can download or preview the document:

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

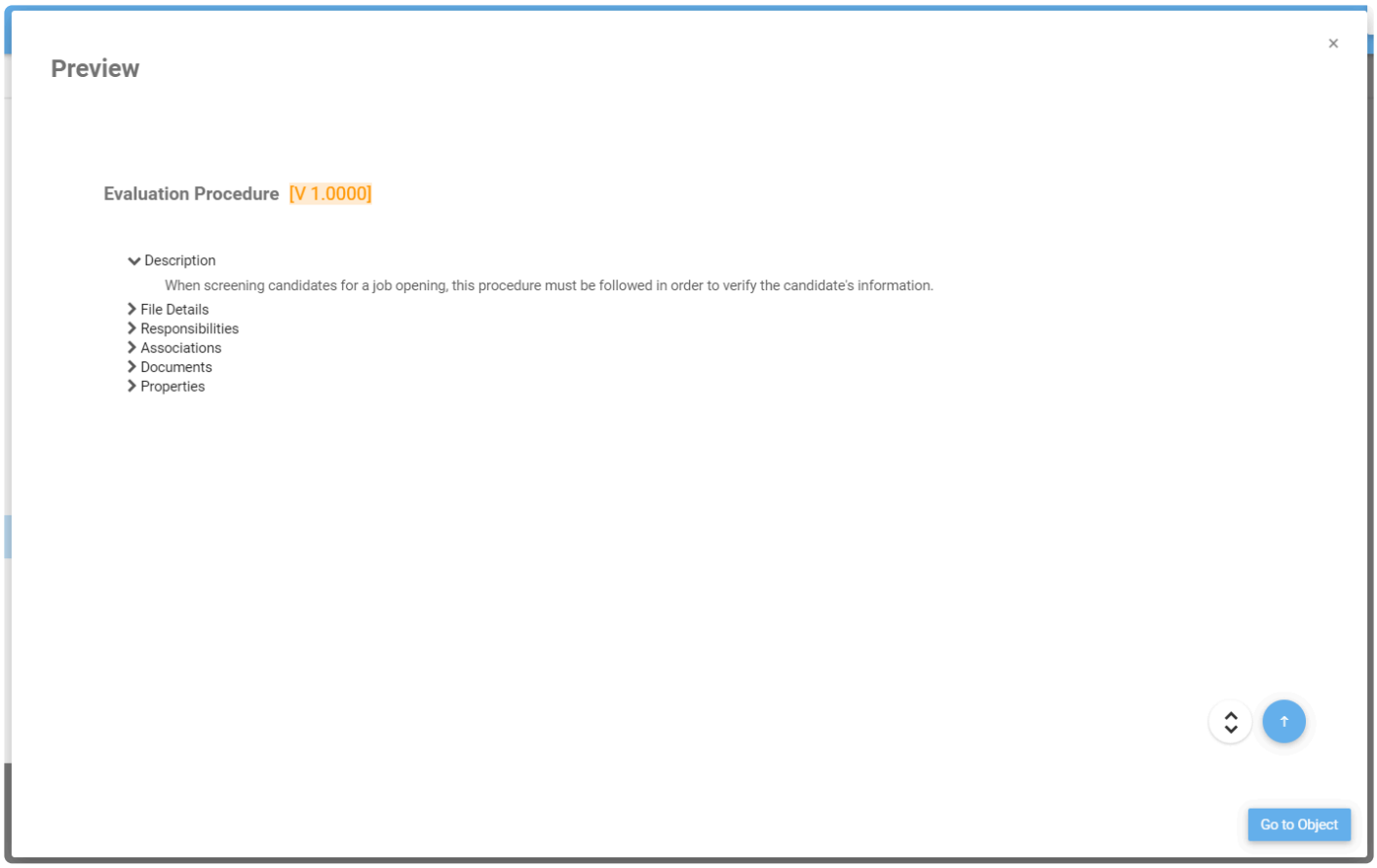
2. **Download**: To download the document click on the icon

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 .

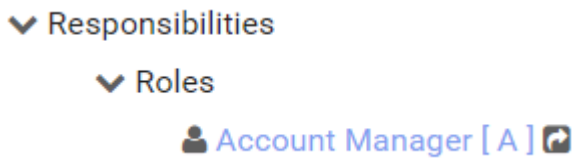
Users can view the document's details in a popup by clicking on its name. To navigate to the document's detail page, click on **Go To Object**



4.8.4.2.6 Responsibilities

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

To navigate directly to the object, click on the icon.



Users can click on the object's name to view its details in a popup. To go to the object's detail page, click on **Go To Object**

4.8.4.2.7 Properties

The properties section provides users with additional key information about items. The properties section is broken down into 3 categories:

1.**Current Version**: Provides information about what version is being viewed, and when the latest modification has been made
2.**Version History**: Provides information on previous versions of the risk. Includes major and minor versions, status, author and date.
3.**Analysis**: Provides information that better allows users to analyze items and related key details.

Current Version

Version Number: 0.0007

Last Modified: a month ago

Version History

Version Number	Status	Author	Date
0.0007	In Progress	Dia Apostolakis (Dia)	February 13, 2019 2:31 PM
0.0006	In Progress	Dia Apostolakis (Dia)	February 13, 2019 2:30 PM
0.0005	In Progress	scott Armstrong (Scott)	December 14, 2018 12:25 PM
0.0004	In Progress	scott Armstrong (Scott)	December 14, 2018 12:25 PM
0.0003	In Progress	scott Armstrong (Scott)	December 14, 2018 12:25 PM
0.0002	In Progress	scott Armstrong (Scott)	December 14, 2018 12:24 PM
0.0001	In Progress	scott Armstrong (Scott)	December 13, 2018 8:47 AM

Analysis

FREQUENCY	Yearly

4.8.4.2.8 Impacts

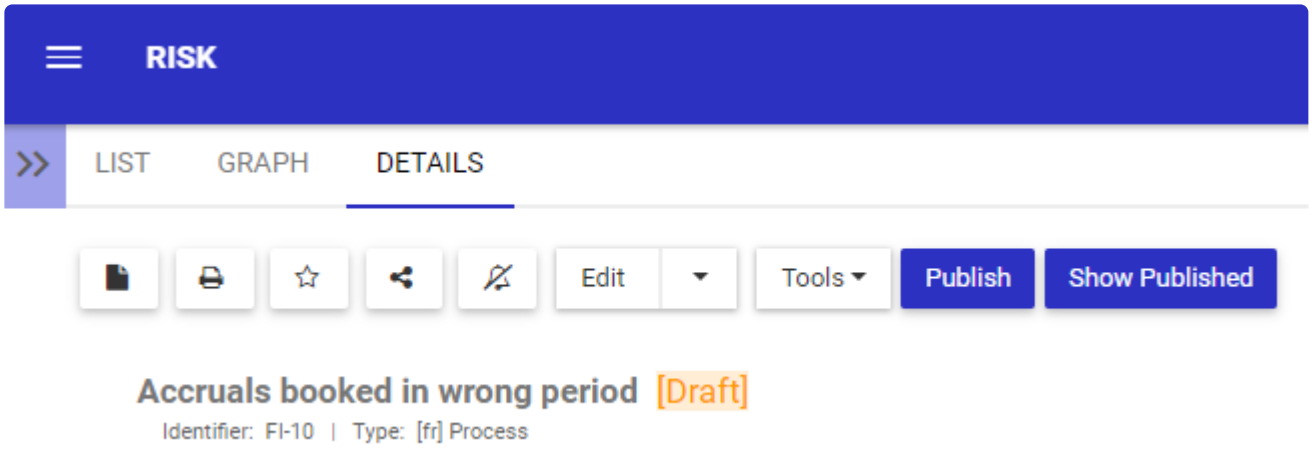
Users are able to view the impacts an object has on others in a list form in the Details view of any object. It is a complement to the Impact Graph, and another way of visualizing impact data.

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 to an object. Impacts 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.

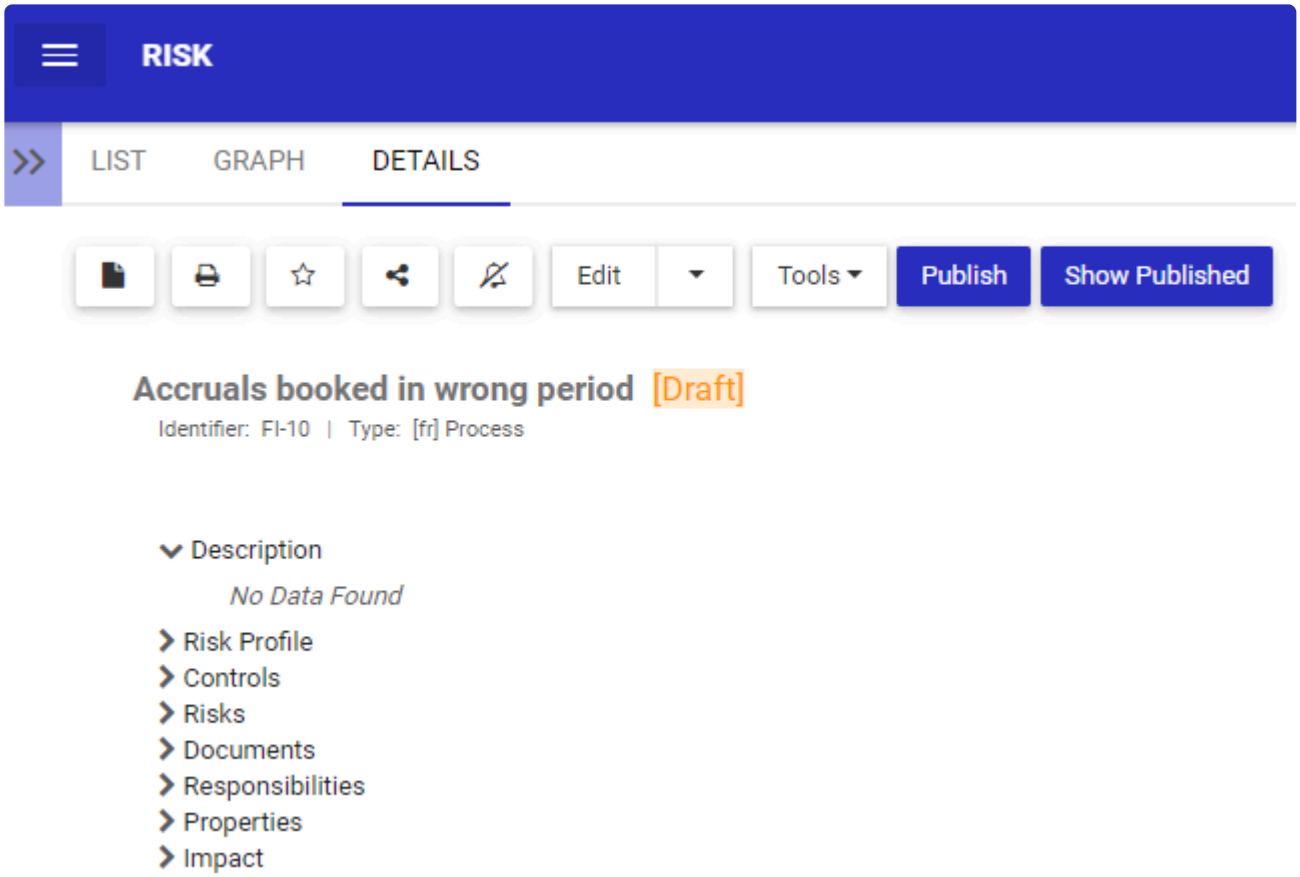
> The impact list will only show **direct** impacts, as opposed to the impact graph, which can be expanded to show **indirect** impacts on an object

Navigating to the Impact List

1. Navigate to any Detail page of any object in EPC



2. At the bottom of the Details page, click on Impact to expand the section



3. All direct impacts associated to the EPC Object will be listed.

> To sort a column by alphabetical order, click on it's header. The arrow pointing up indicates sorting in **Ascending Order**, the arrow pointing down indicates sorting in **Descending Order**, and no arrow indicates **No Sorting**.

Object Name A	Parent B	Object Type C	Assignment Type D	Justification E	Impact Type F	Status G
[Default Template] Analysis (A4 - Lands...	Default template folder	Document	Directly Impacts		Association	Published
Document should be reviewed every yea...	Import Folder	Rule	Directly Impacts		Association	Published
Enforce a zero-tolerance policy for dang...	Import Folder	Control	Directly Impacts		Association	Published
Onboarding cost	Imported Objective	KPI	Directly Impacts		Association	Published
Ratio of candidates to hires	Imported Objective	KPI	Directly Impacts		Association	Published
Risk B - with risk analysis!	Import Folder	Risk	Directly Impacts		Association	Published
Warehouse	Imported Measure Set	Objective	Directly Impacts		Association	Published

A	Object Name	The Name of the object. Click on the hyperlink to go to the object
B	Parent	The Parent of the object
C	Object Type	The type of the object
D	Assignment Type	The relationship type between the two objects

E	Justification	The justification of the object
F	Impact Type	How does this object impact the current object
G	Status	The status of the object (In Progress or Published)

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.

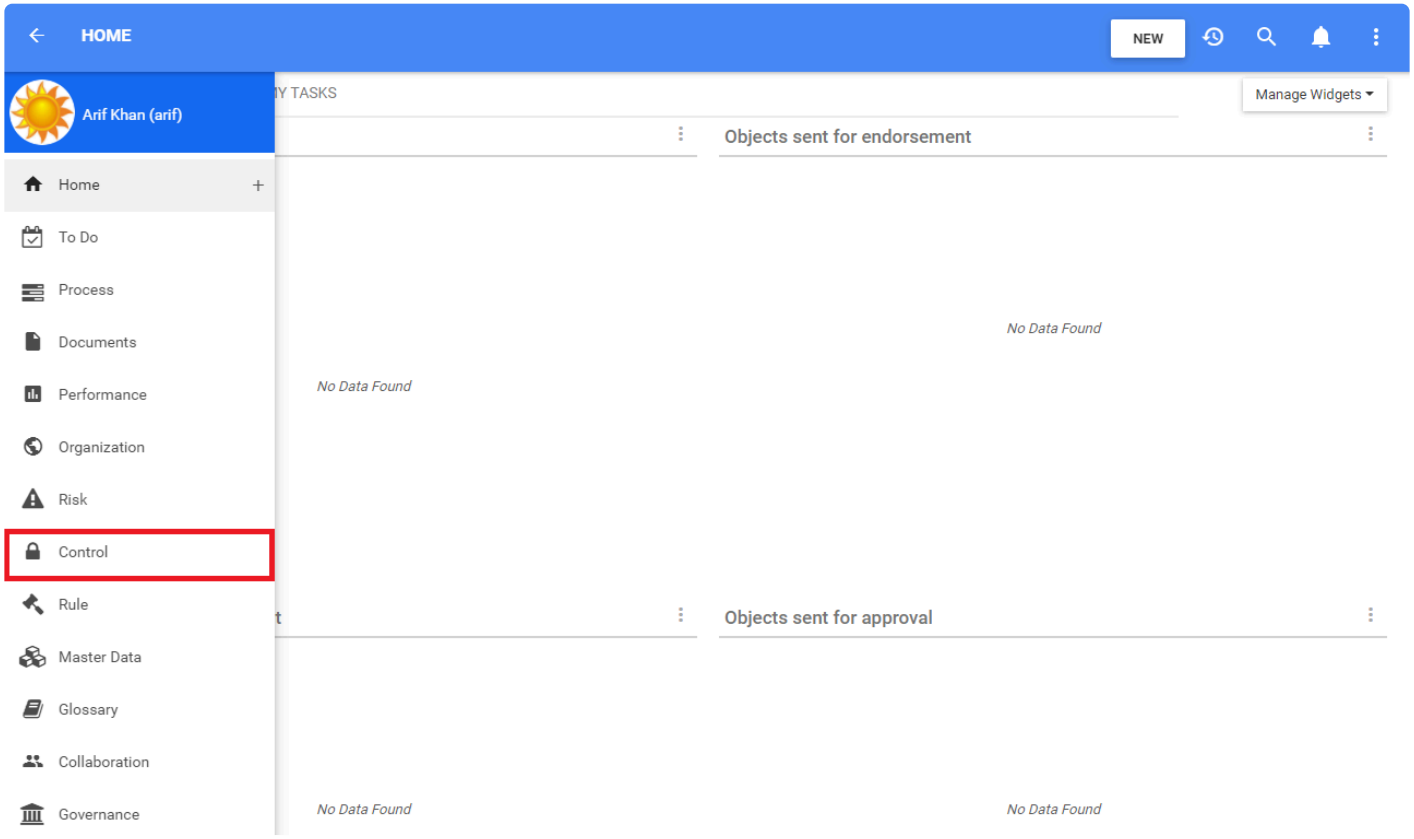
Dimension	Details
1. List	Provides view of all risk sets you have access to
2. Graph	Provides the visual representation of the risk set, their features and links (Impact and Hierarchy Graphs)
3. Details	Provides additional key information regarding specific risk details

How to access the Control module:

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

or

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. No hierarchy filter	A list view where **all** items within the given module are listed
2. Current level & below	A list view where **all levels below** the selected item are listed
3. Current level	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
Documents	Whether or not there are Documents directly associated with the item in question
Identifier	Textual search for any existing unique identifier of an object
Category	Whether or not the item in question is associated to a Category
Org Units	Whether or not there are Org Units directly associated with the item in question
Asset	Whether or not there are Assets inputted for the item in question
Resource	Whether or not there are Controls 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
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

© 2020 Interfacing Technologies Corporation

Modified Date	The last date that the object in question was modified
Last Modified By	The name of the last resource that modified the object
Status	View the status of the item in question when Show Latest mode is on
Locked	Whether the item in question is currently locked or not

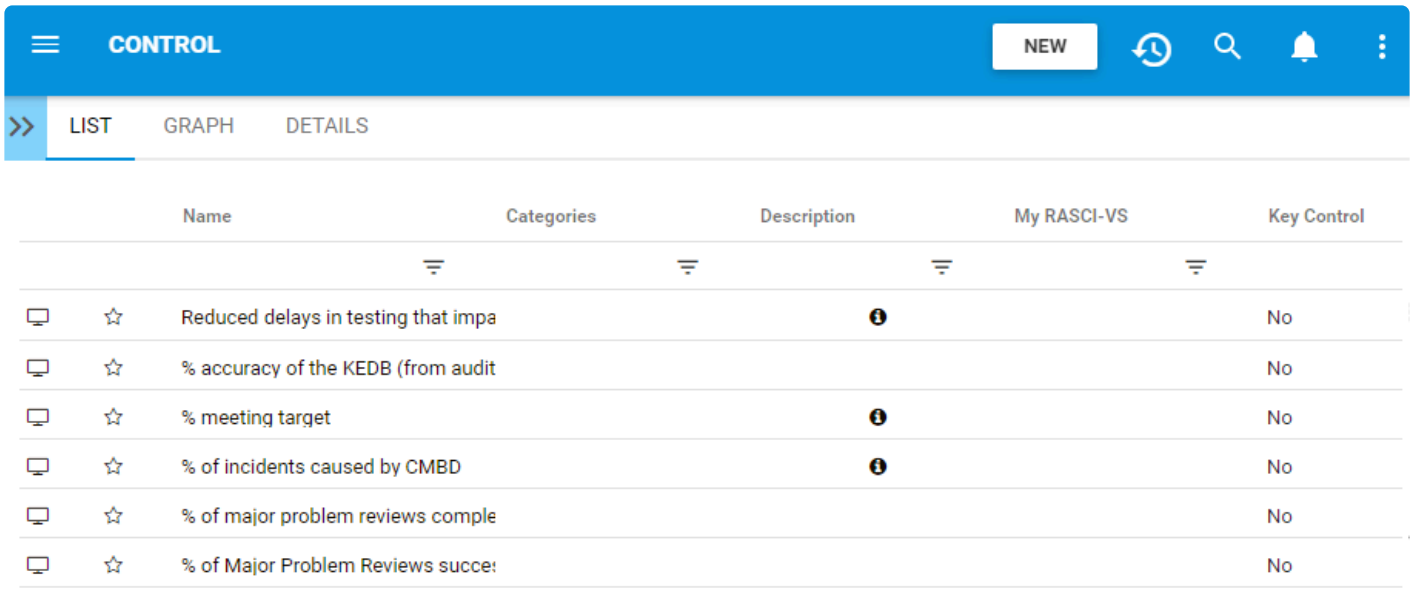
> The selected list view will be saved both by web browser and by user.

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).

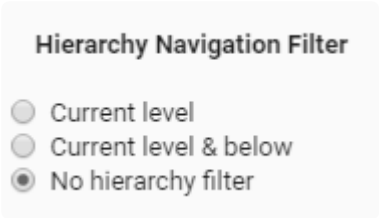


To simplify Control viewing; users **are not** greeted with all major Controls that they are associated too. Users are greeted with the list of Control Sets, the highest level of Control Classification in the EPC. However users can display these risks within the **List View**. Please see the **Optional**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

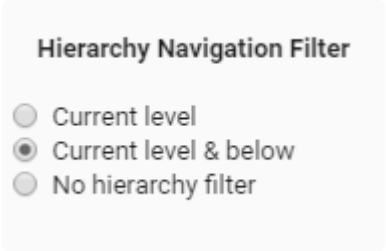
> These steps are only required if a user is using an account or browser for the first time. As noted above, list preferences will be saved by user and browser to simplify navigation.

4. **(Optional)** To view sub-processes, users must select the filter panel and then select “Current level & below of the EPC Web App.

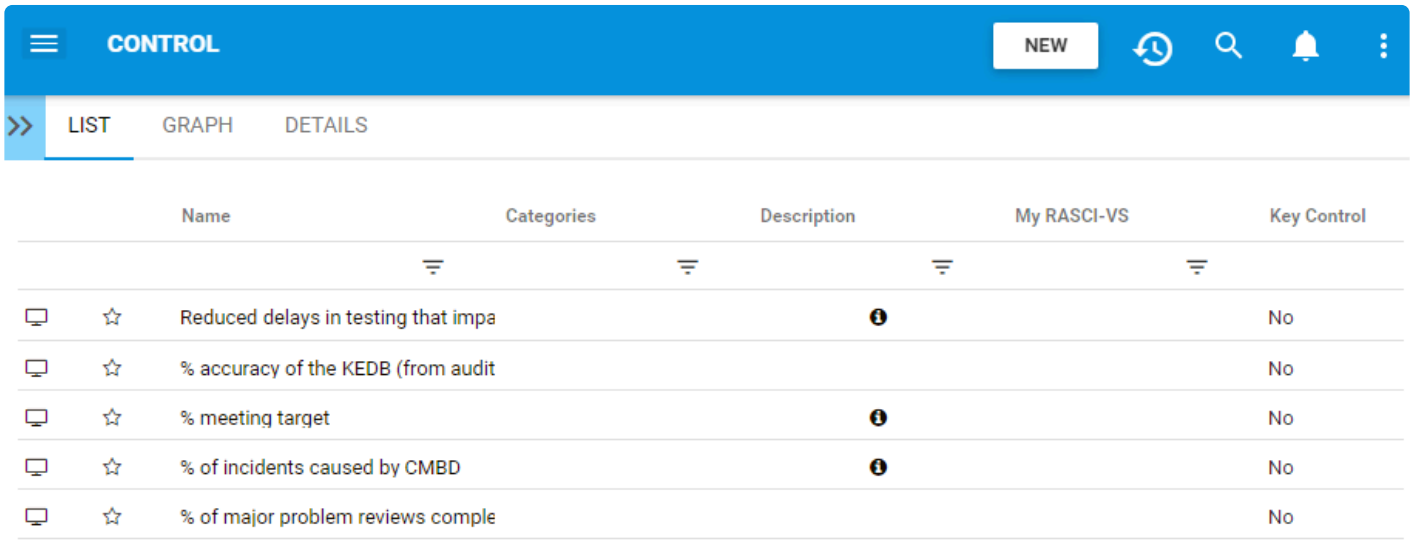
5. **(Optional)** Click on the filter setting and it will generate a list view



6. **(Optional)** Select “Current level & below”



7. **(Optional)** Upon selecting the “Current level & below”, the EPC will automatically refresh the page



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

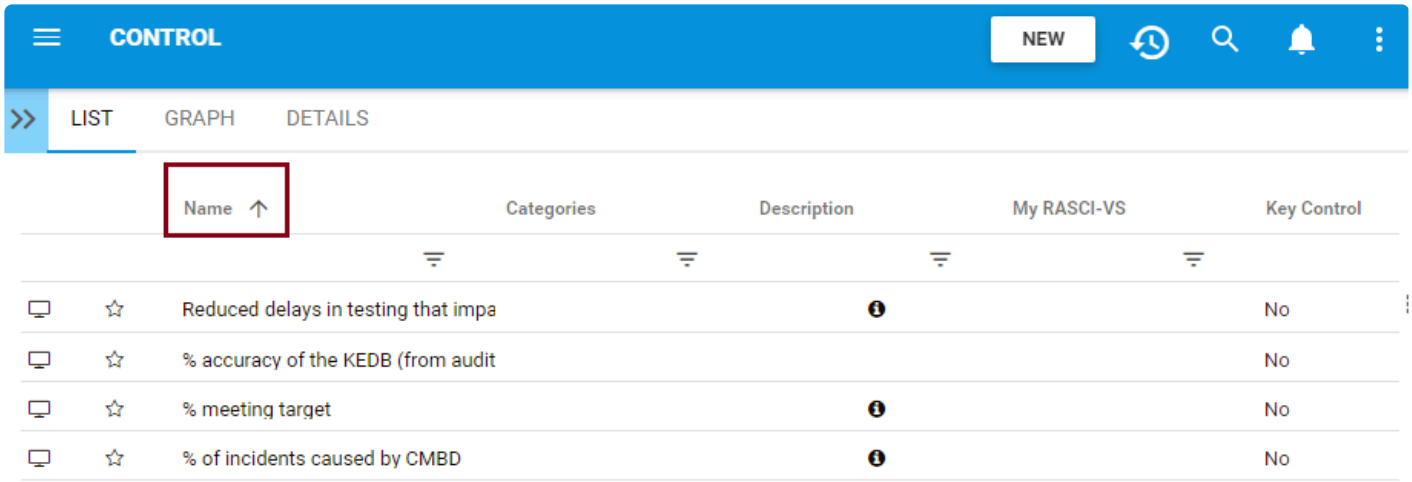
1. Navigate to the Control Module

2. Navigate Cursor to desired **Category**

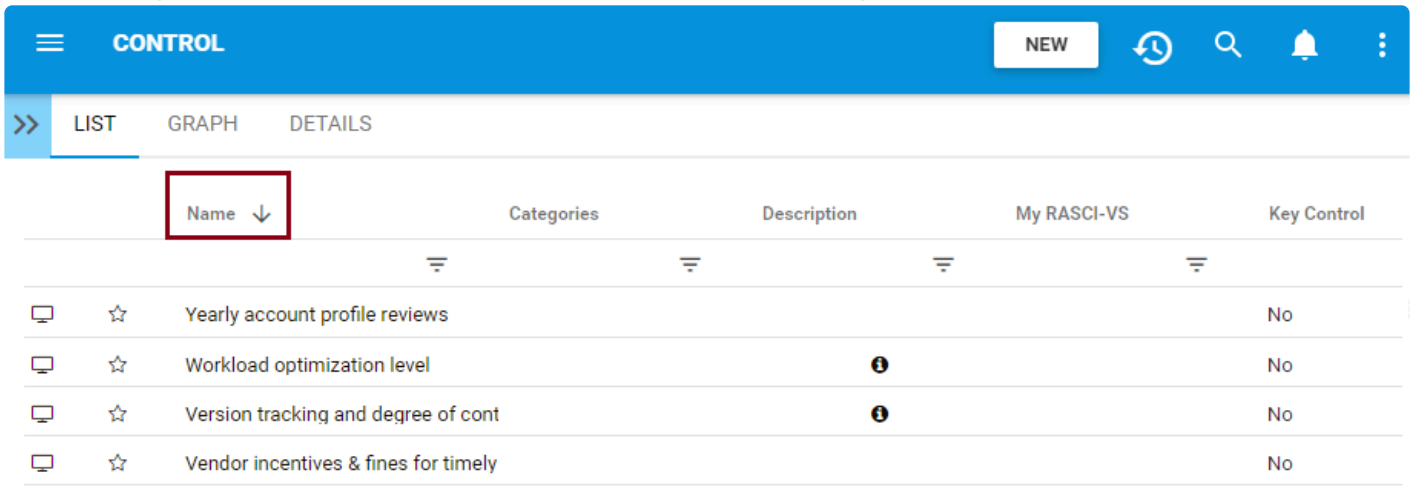
3. Click on the **Category**

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.



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



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
Documents	Empty – The object has no associated documents Not-Empty – The object has at least one associated document
Identifier	Empty – The object does not have a unique identifier Not-Empty – The object has a unique identifier
Category	Categories created by admin
Org Units	Empty – The object has no associated org unit Not-Empty – The object has at least one associated org unit
Asset	Empty – The object has no associated asset Not-Empty – The object has at least one associated asset
Resource	Empty – The object has no associated resource Not-Empty – The object has at least one associated resource
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
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

© 2020 Interfacing Technologies Corporation

	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
Last Modify By	Textual search of last resource who last modified an object
Status	Approved In progress Published Rejected Revised Sent for a review
Locked	False – The object isn't locked True – The object is locked

The Filtering section will cover the following:

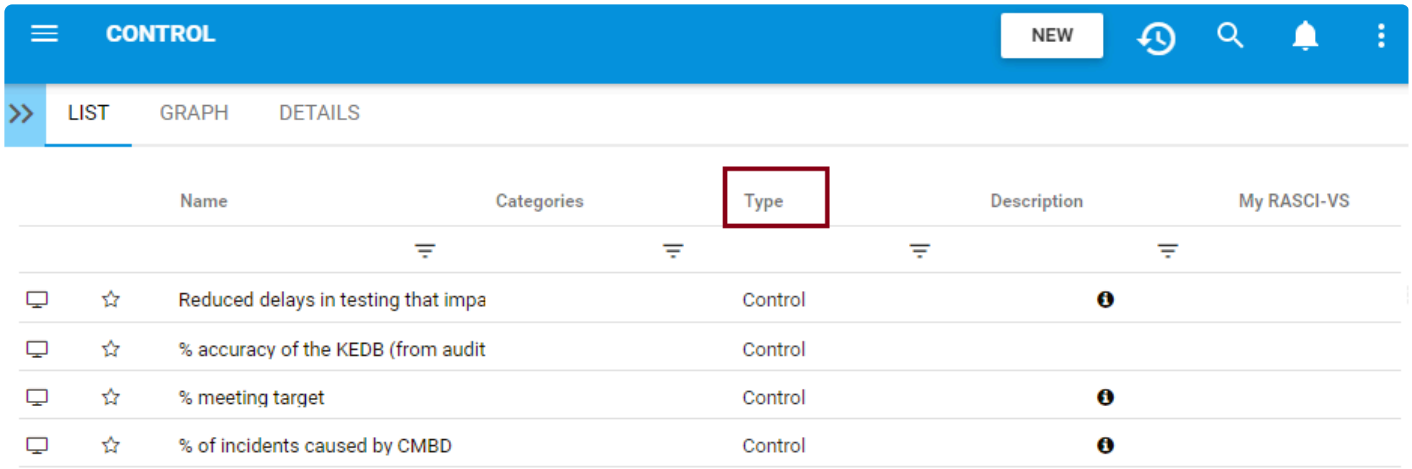
1. How to Add Filters
2. How to Remove Filters
3. How to Combine Filters

4.9.2.2.1 Add Filter

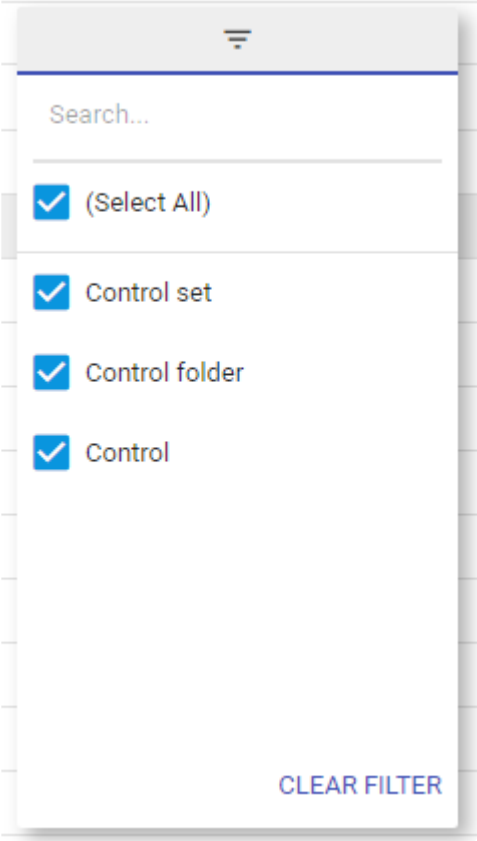
You can add filters to see Controls and other specific items of your choice. **Type** what you are looking for, **select** the filter in the drop-down menu, or **define the range of dates.**

How to Add Filter

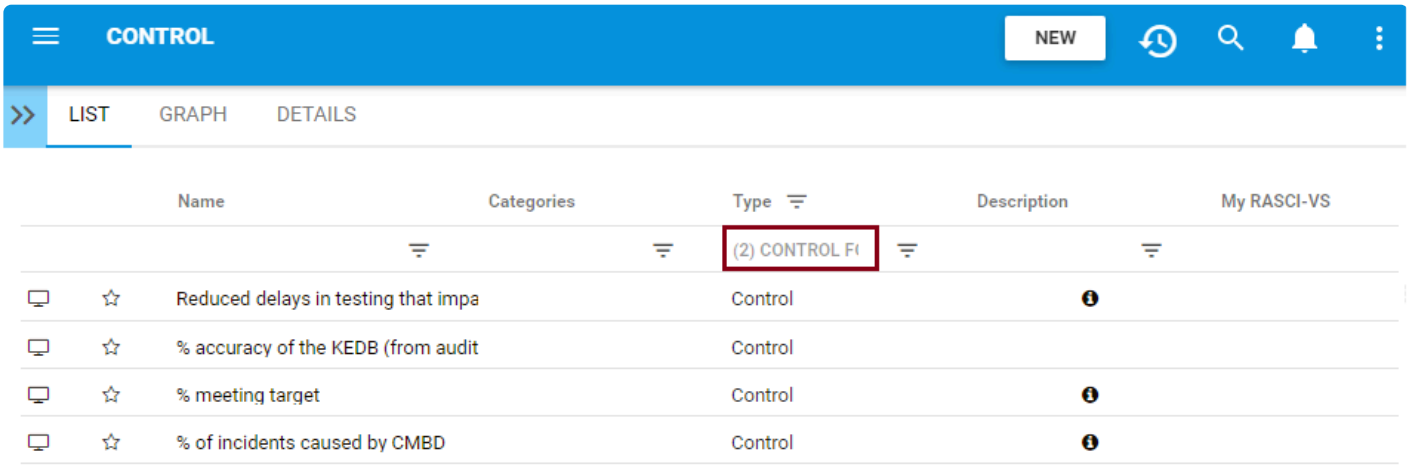
1. Navigate cursor and select the box column you wish to filter. For this example, we will use **Type.**



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



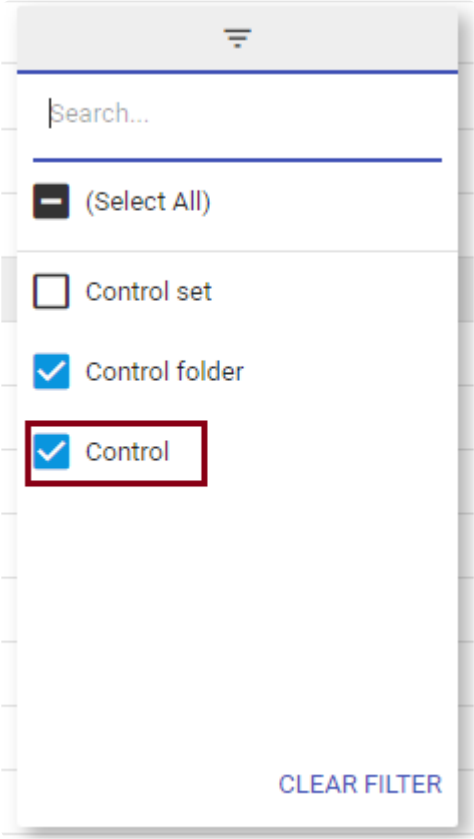
3. Select the desired filter. For this example, we will select **Control** and **Control Set.**



4.9.2.2.2 Remove Filter

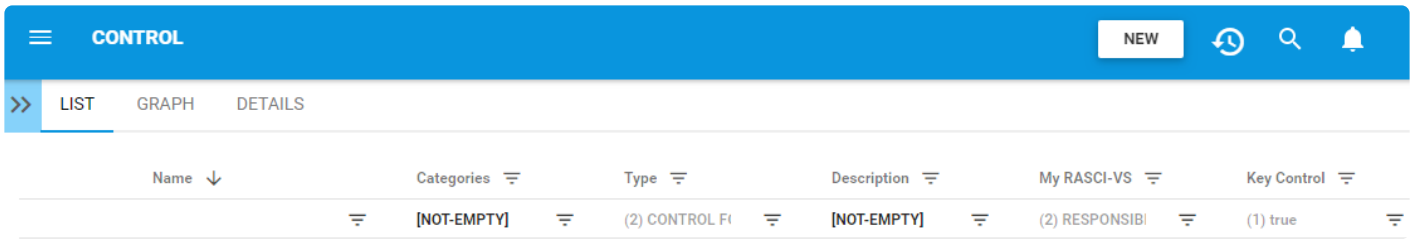
You can remove filters; this will naturally increase the results in your list.

Click on the button beside the filter name.



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**.



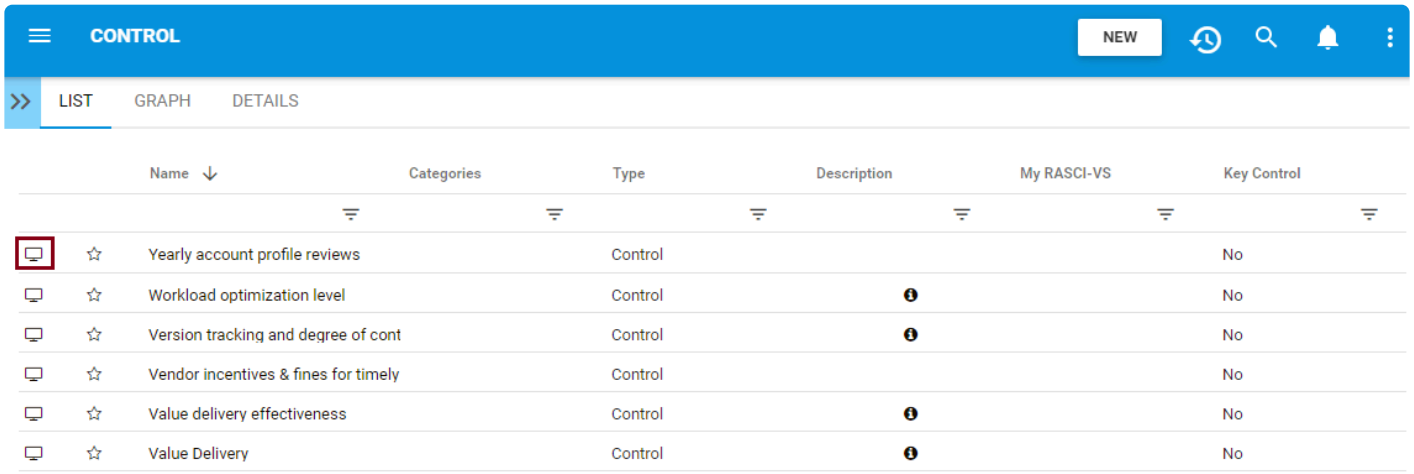
4.9.2.3 Quick Graph View

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".

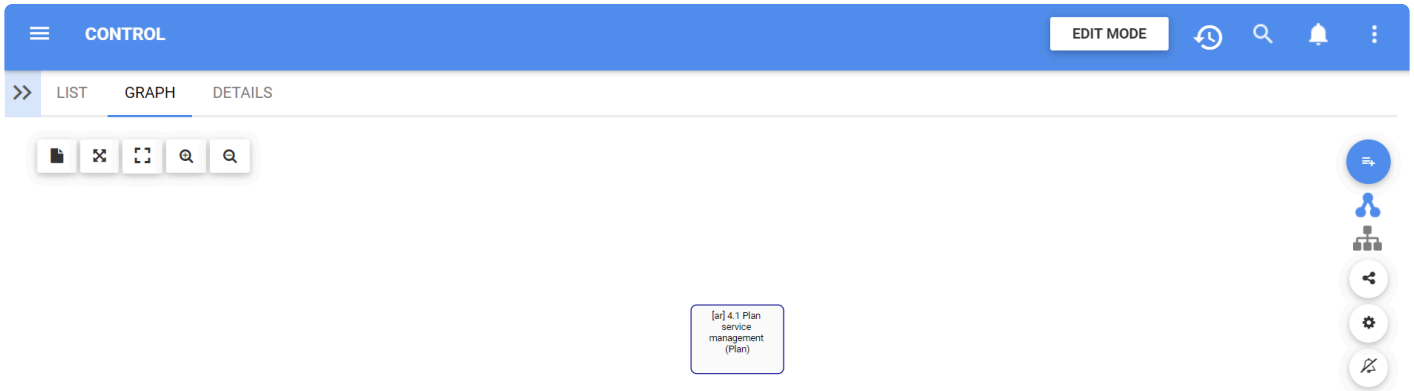
Please see the instructions below:

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.



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.

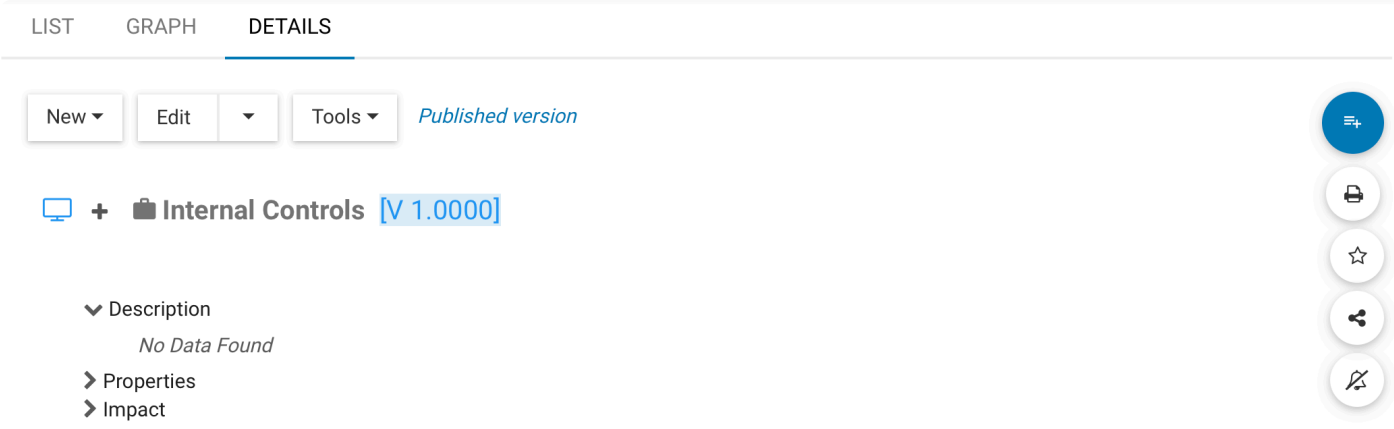
How to navigate to the Graph section (Manual Navigation)

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

2. Click on **Control**

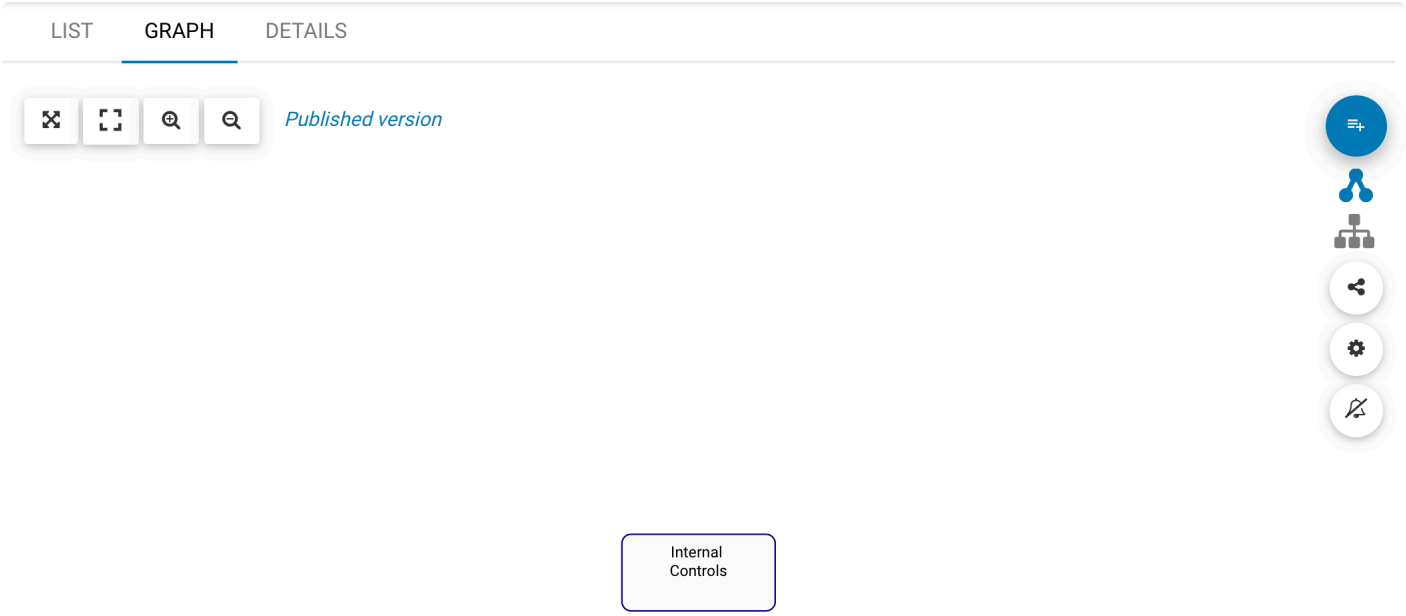
3. By default, you will be directed to **List View** in the Control module.

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



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

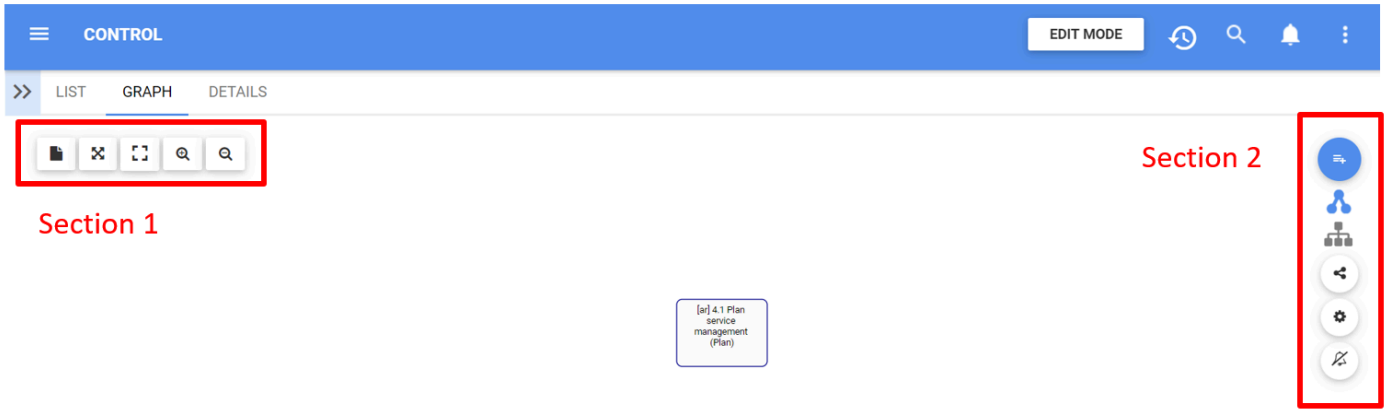
6. Select the “Graph” tab on the upper left corner of the page



7. You will be navigated to the Graph section. By default, users will be sent to Impact view as the default Graph view.

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
Process Book		This button will open the template selection window
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

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

Share		This button will allow a user to share the process being viewed
Settings		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.

4.9.3.1.1.2 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 for instructions.

4. Click on button and the page will be reset

4.9.3.1.1.3 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

4.9.3.1.1.4 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.

4.9.3.1.1.5 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

4.9.3.1.1.6 Share

The share function, symbolized by the icon, has been added to copy links to items, objects and processes in the EPC.

Simply lick on the share icon, and the URL will be copied to your clipboard.

4.9.3.1.1.7 Settings

The Settings 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 settings button.

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

1. Select “Settings” icon

2. Navigate cursor to “Asset, Attribute”

3. The drop-down menu will be generated

4. Select the desired filter and select “Save Changes.”

4.9.3.1.1.8 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.

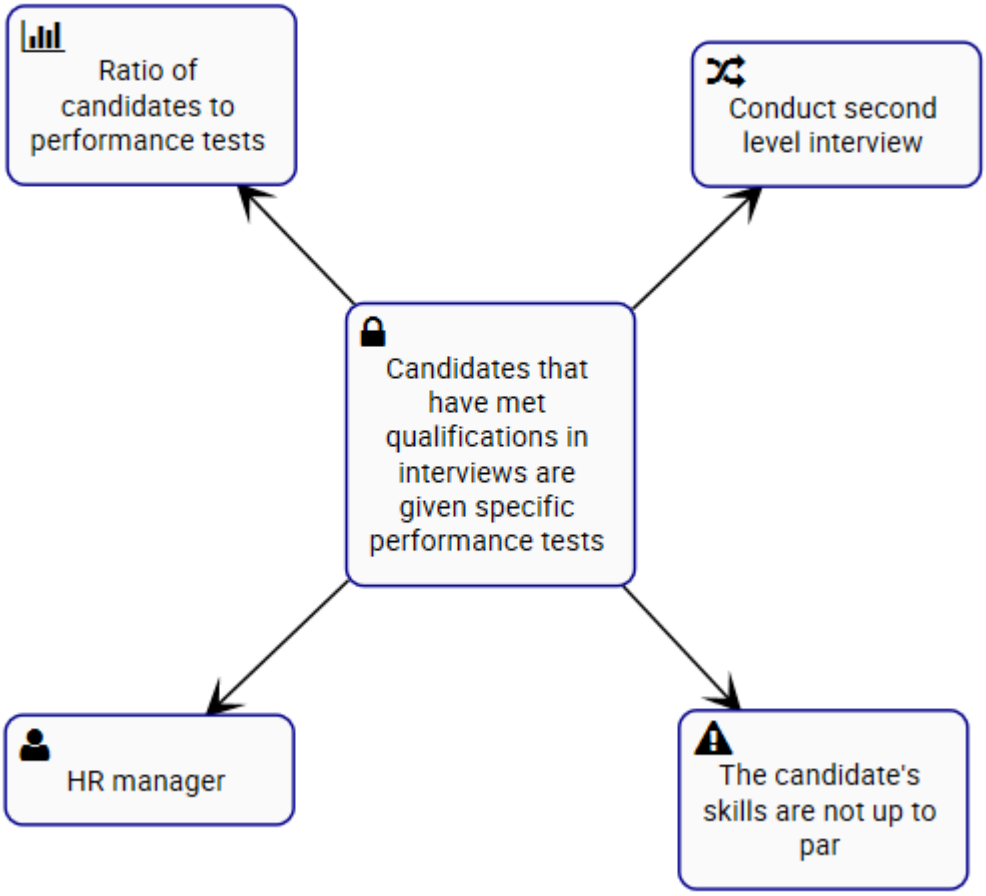
To use the Subscribe button, please see the following instructions.

1. 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

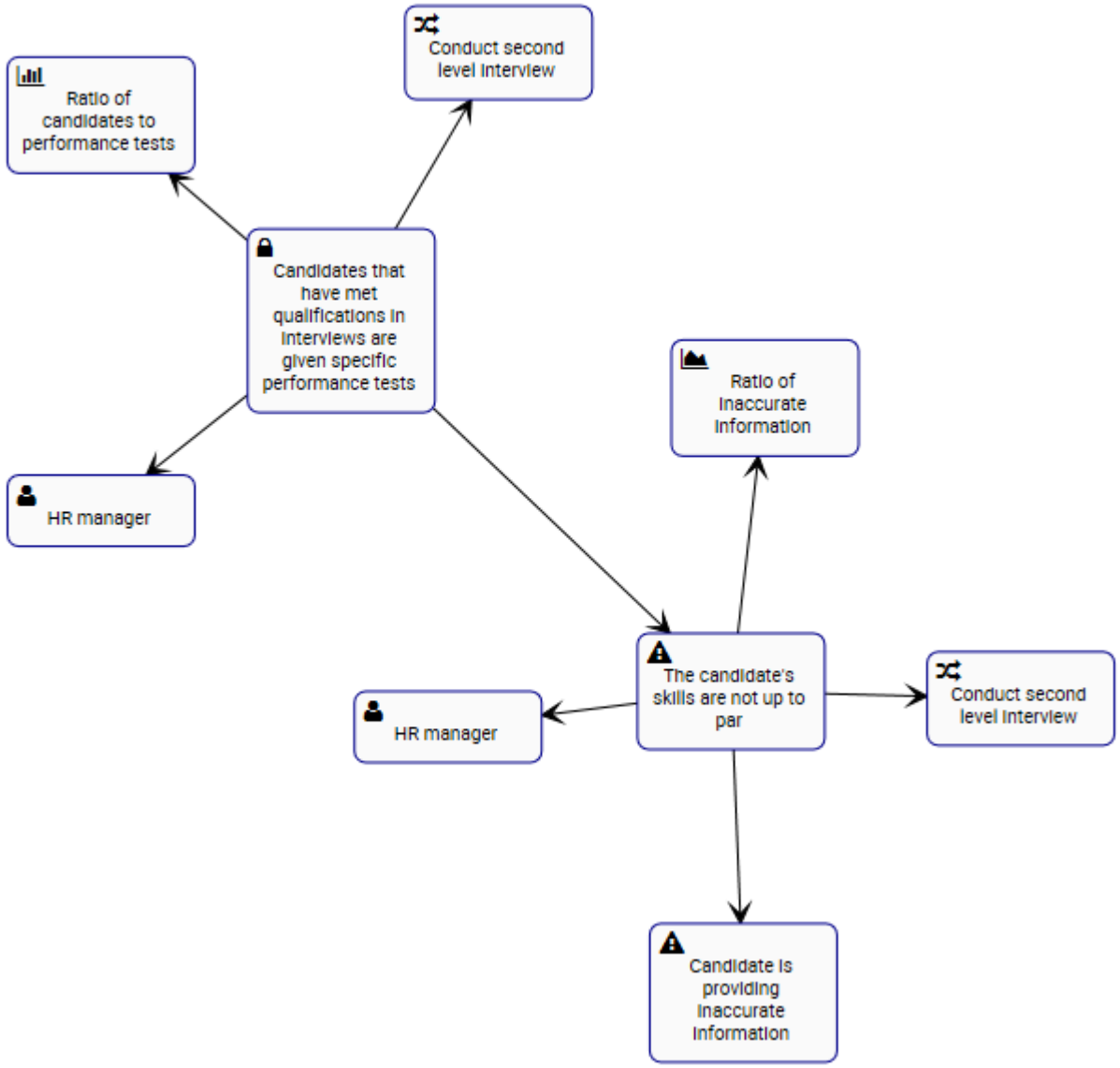


The example features the Impact Graph of the Control “Candidates that have met qualifications in interviews are given specific performance tests.” The Control itself is associated to a Role “HR Manager”, to a Risk “The Candidate’s skills are not up to par,” to a Key Control Indicator “Ratio of candidates 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

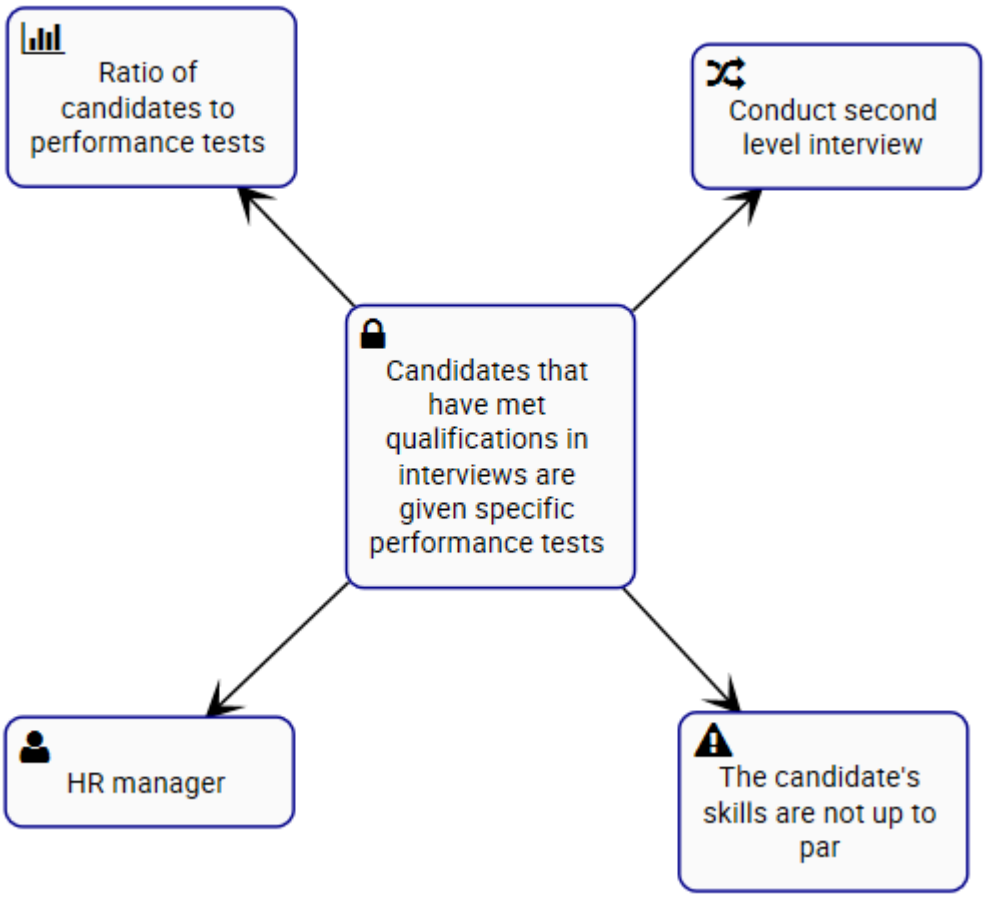
Impact Graph Navigation

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

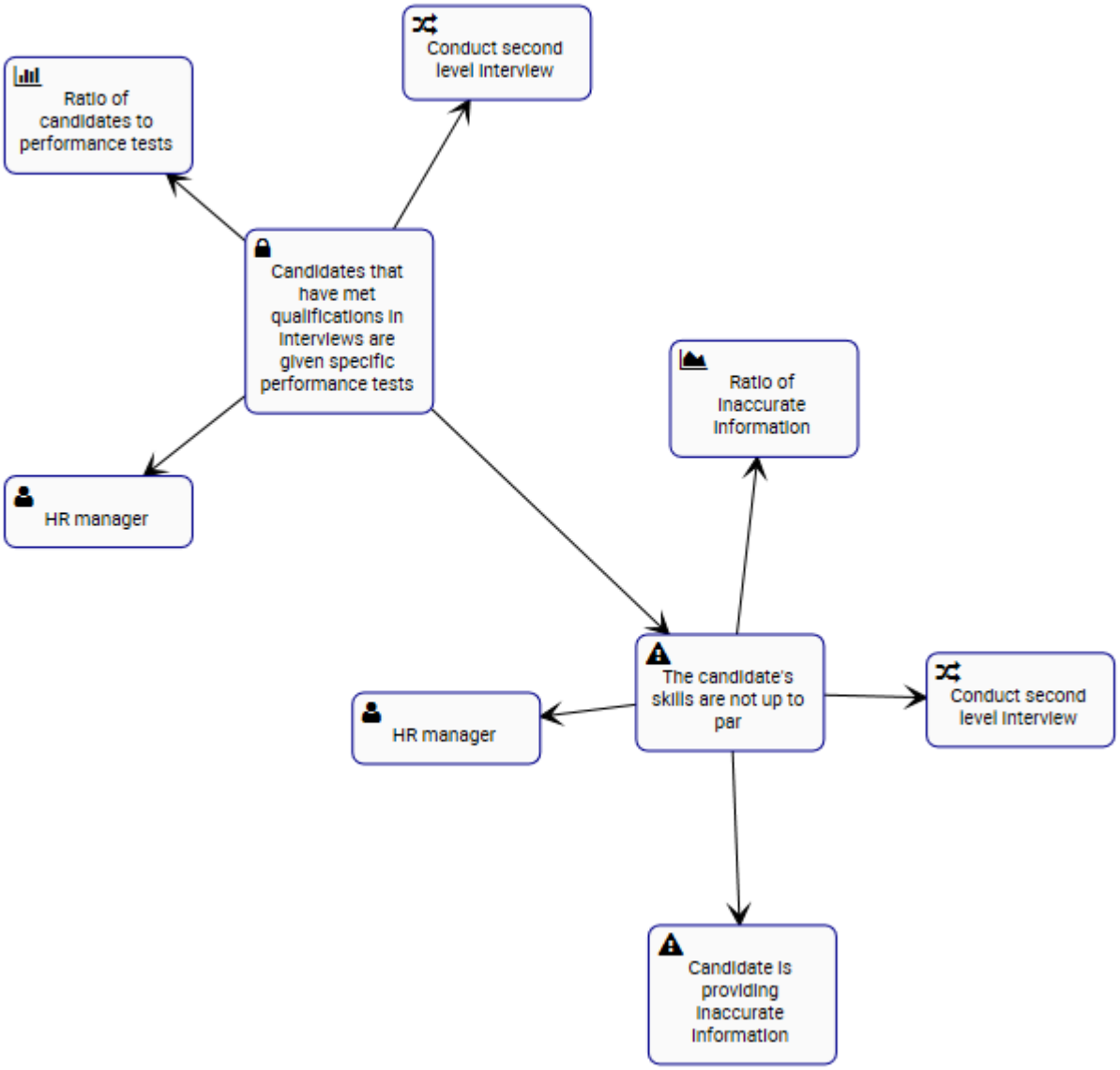
1. Navigate to a Control within the Control Module

2. Click on the Quick Graph View icon

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



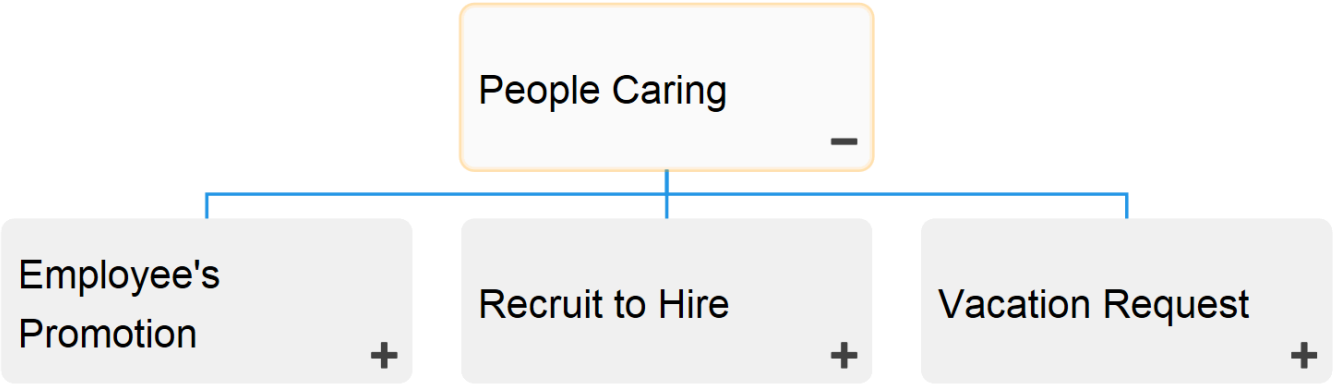
4. (Optional) To further expand the Impact Graph, simply double-click on the item to which you would like to display


Conduct second level interview
Ratio of candidates to performance tests
Candidates that have met qualifications in interviews are given specific performance tests
Ratio of inaccurate information
HR manager
The candidate's skills are not up to par
Conduct second level interview
HR manager
Candidate is providing inaccurate information

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

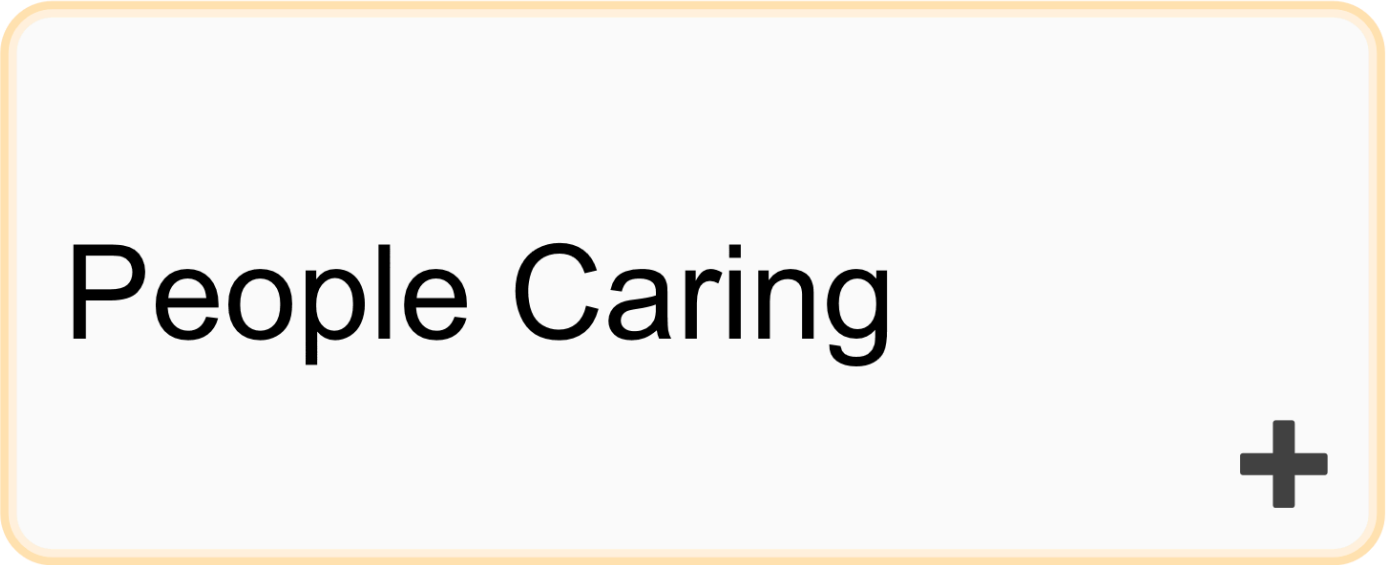
2. Select the item to which you would like to view.

> 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

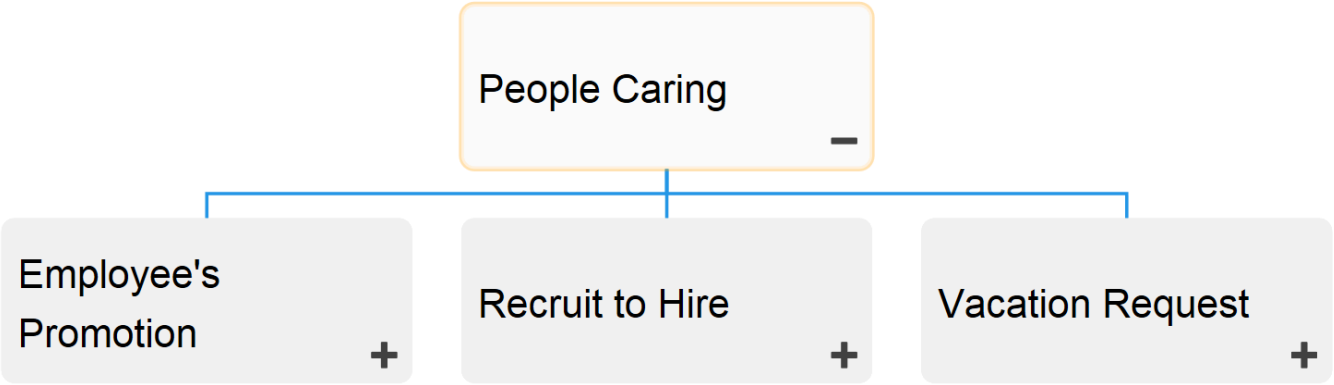
3. Select the Quick Graph View icon of the desired item

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.

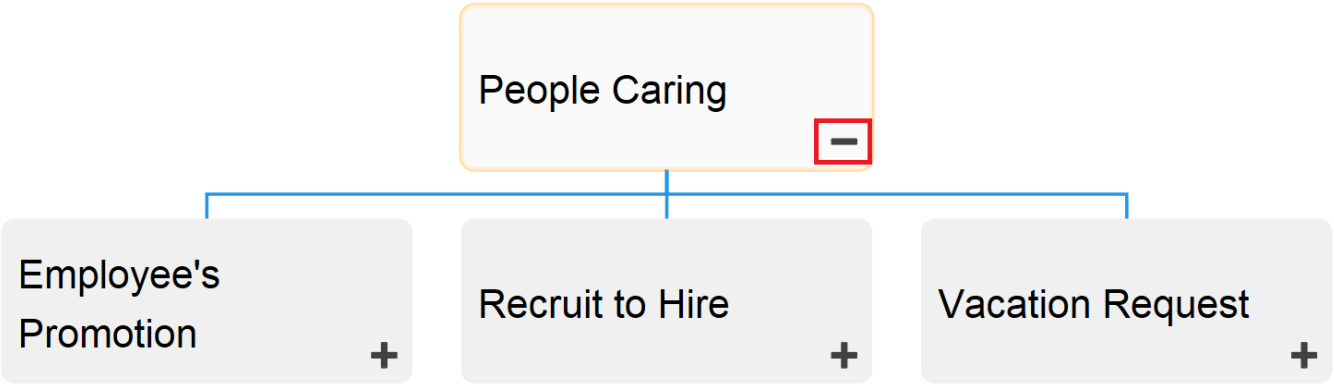


6. To further expand components of the Hierarchy Graph, double click on the on the objects in the Graph. This will expand the item selected.



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

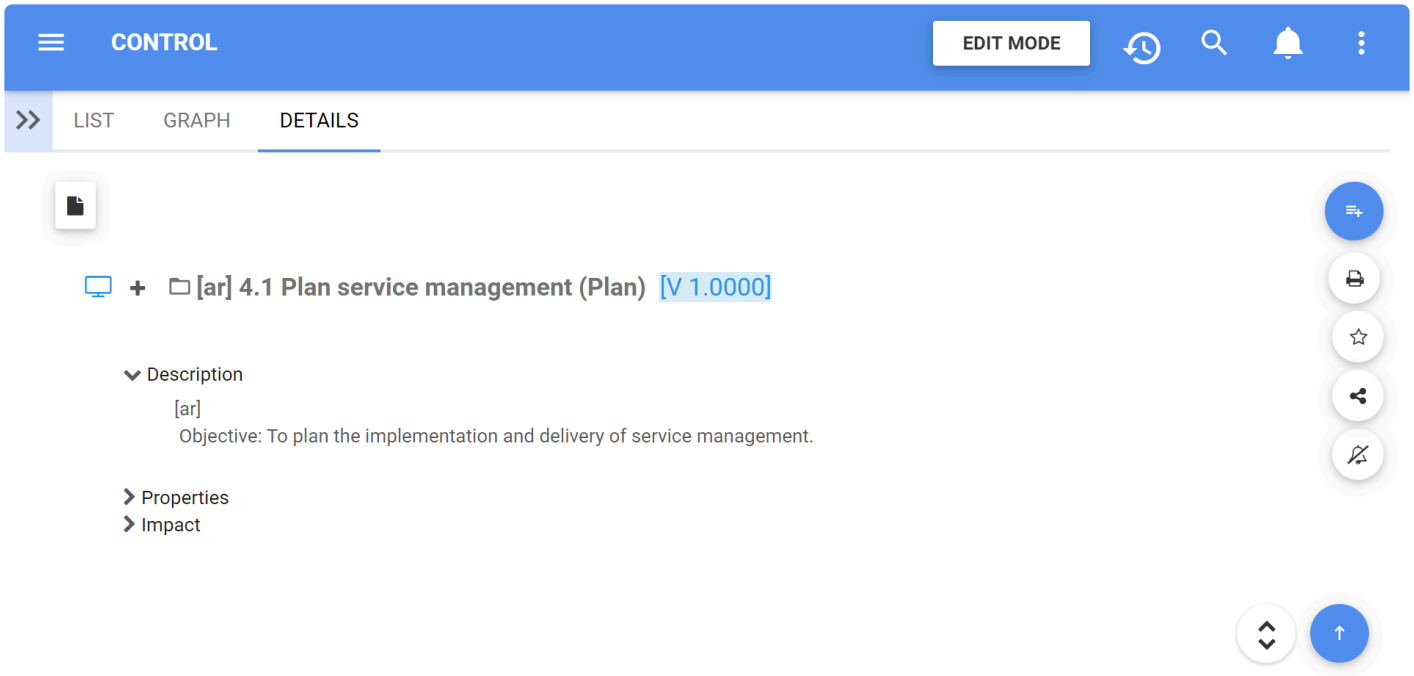
8. To close opened items, double-click on the icon


People Caring
Employee's Promotion
Recruit to Hire
Vacation Request

4.9.4 Details

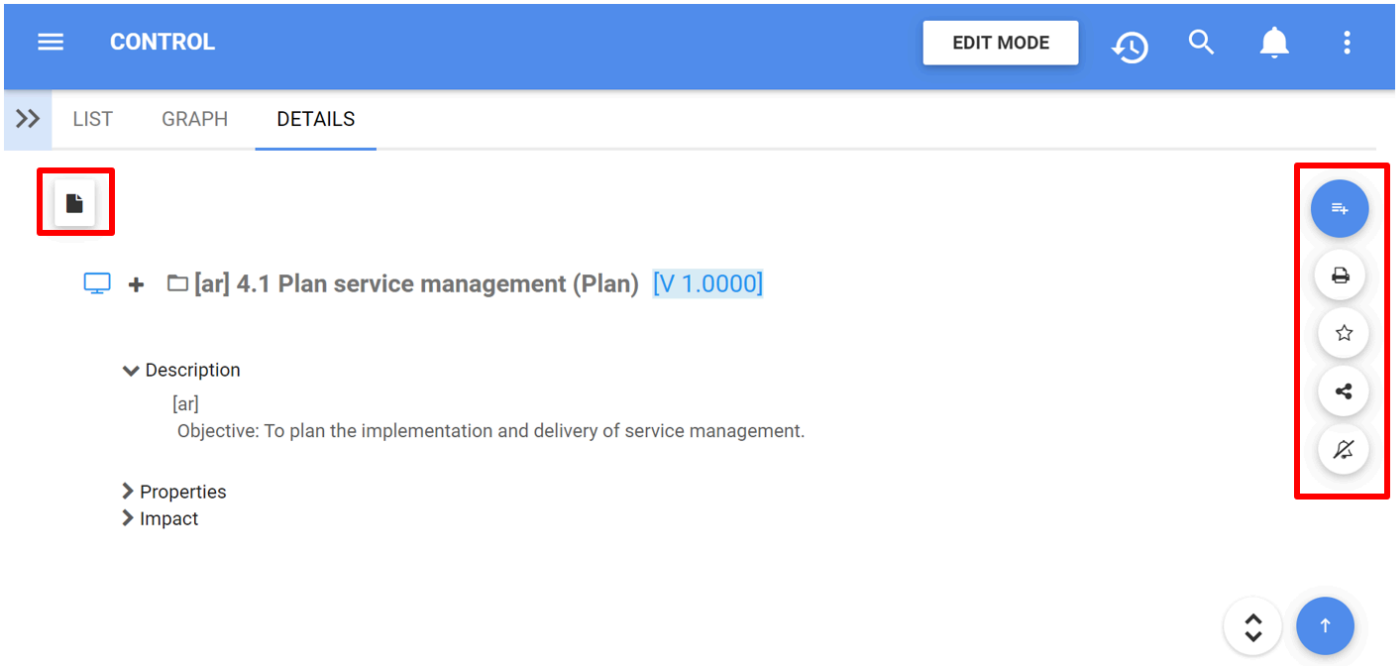
The Description section is where you will find details about the Control folders, Control Sets, or Controls you are observing. This rich text area allows for the display of all additional details that has been uploaded regarding the item in particular. These details provide users with all critical information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



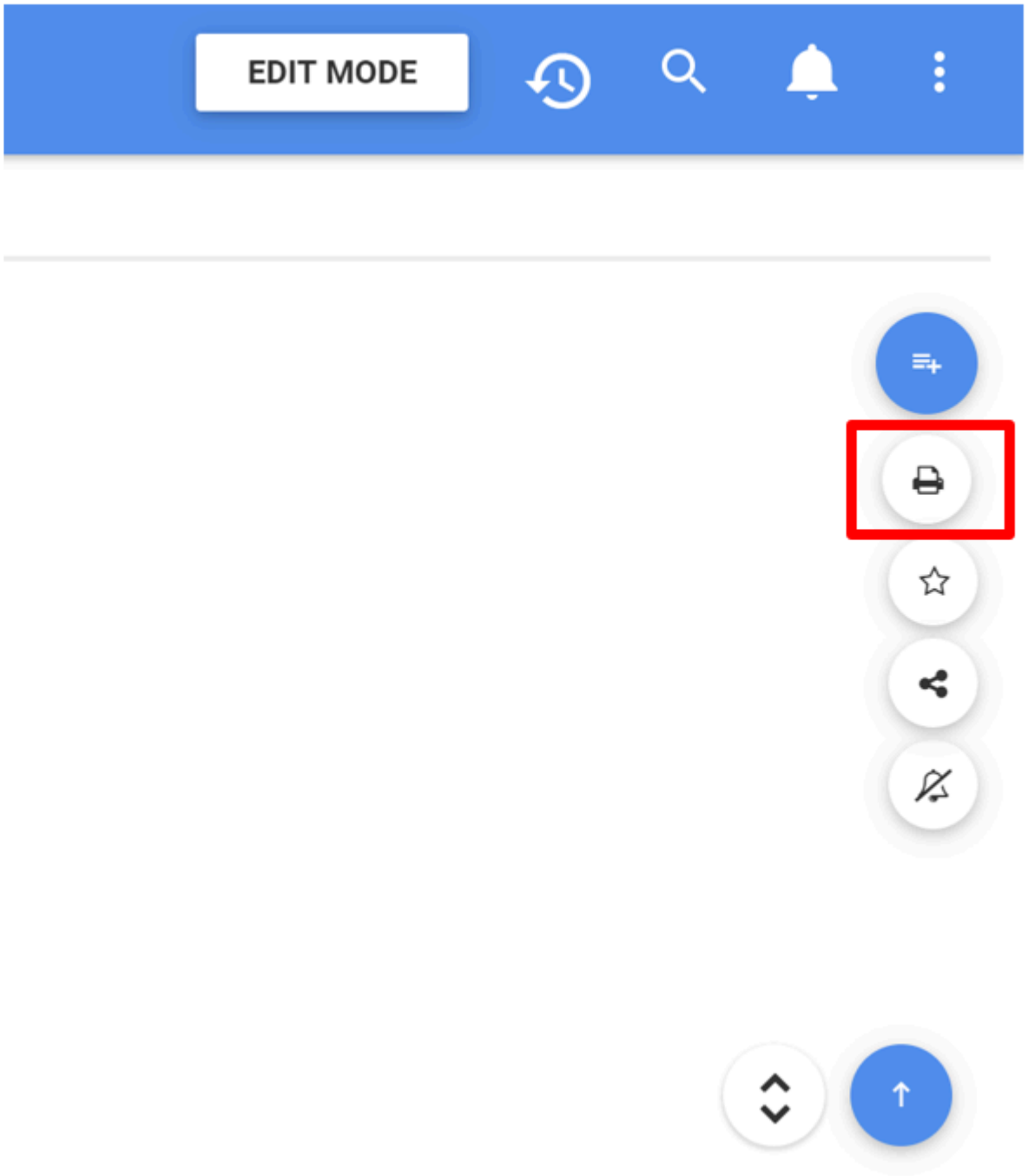
4.9.4.1.1 Toolbar

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
Favorite		Allows users to sort by favorites in the “My Actions” widget
Share*		This button will allow a user to share the process 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.

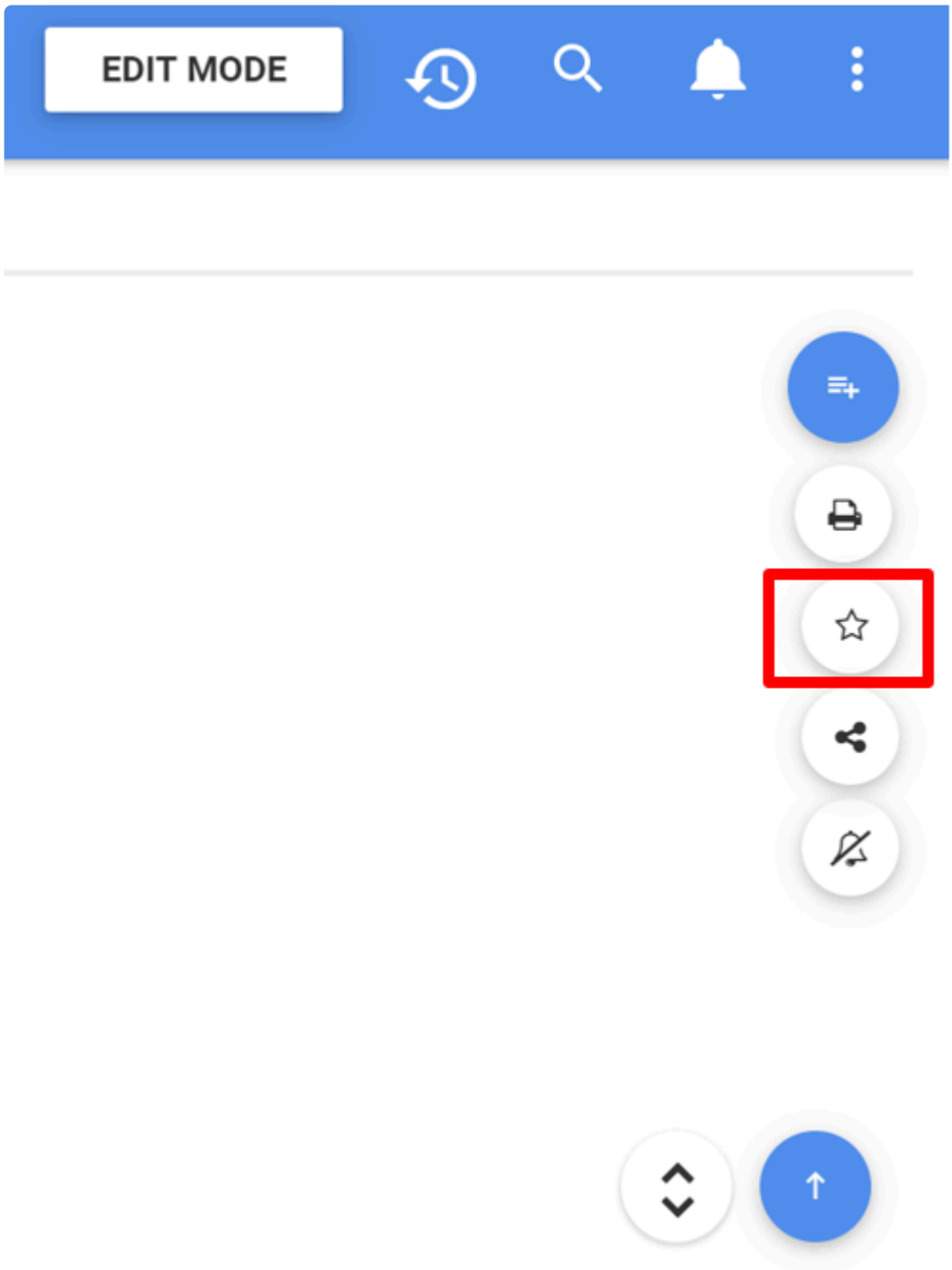
4.9.4.1.1.1 Print

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.



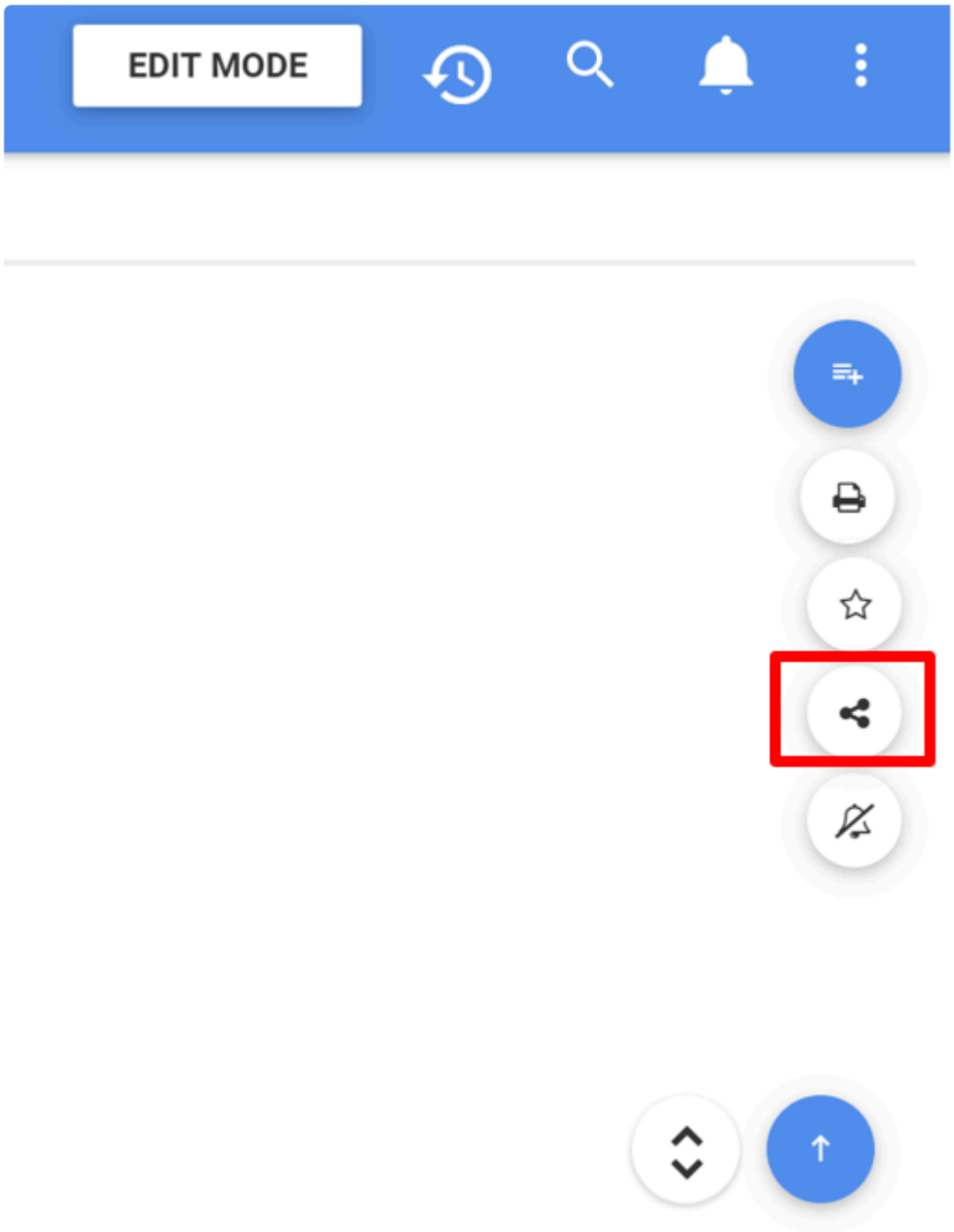
4.9.4.1.1.2 Favorite

The favorite button allows users to directly favorite the details page that they are currently viewing.



4.9.4.1.1.3 Share

The share button allows users to directly share the details page that they are currently viewing.



4.9.4.1.1.4 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 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.

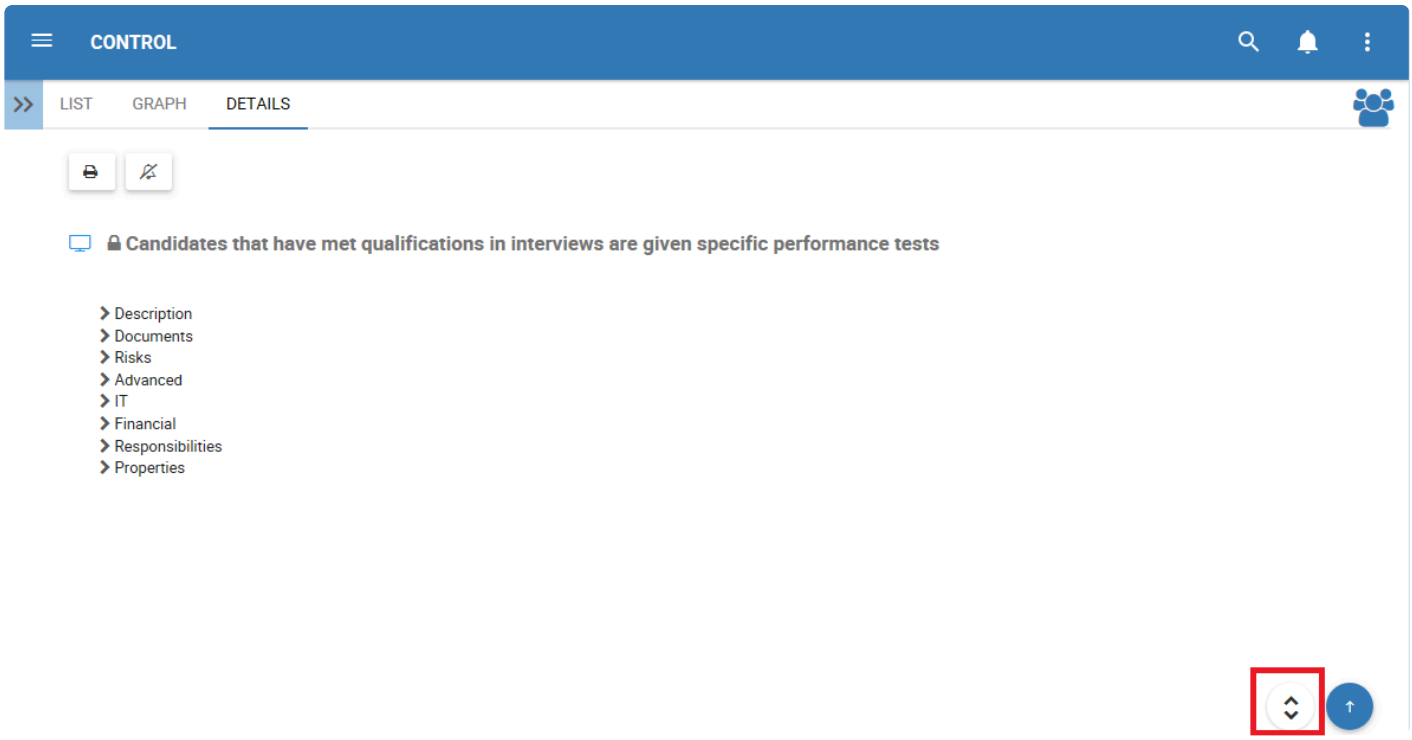
Control Details display the following content

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

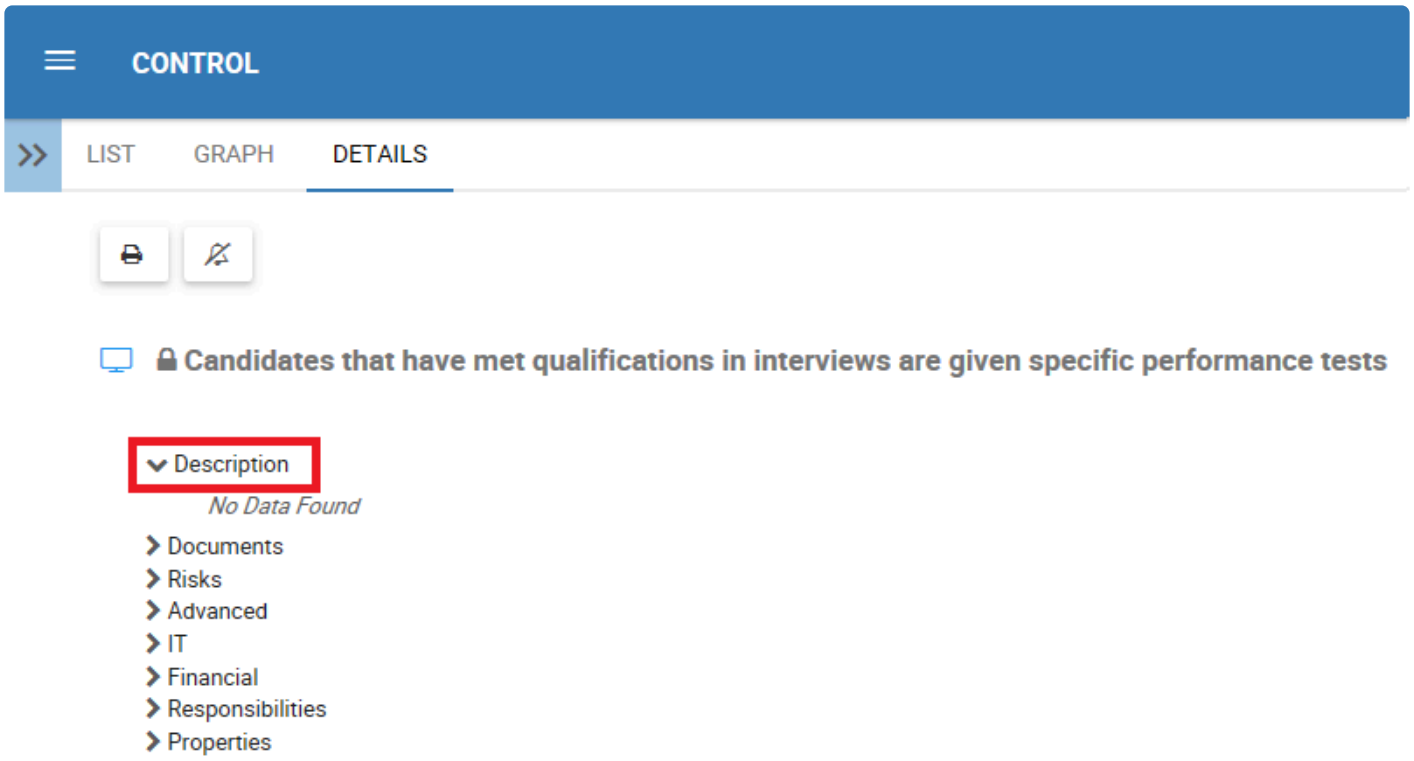


* Selecting different items will result in different information being displayed. The above components specifically relate to the information that will be provided for items.

* 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

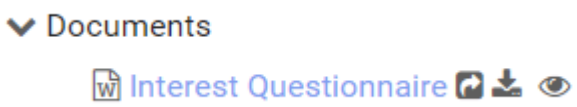
The description section provides users with all details relating to what a **Control** is, as well as particular information that can assist with execution.



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.)

To navigate directly to the object, click on the icon.



Users can also preview and download the document:

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

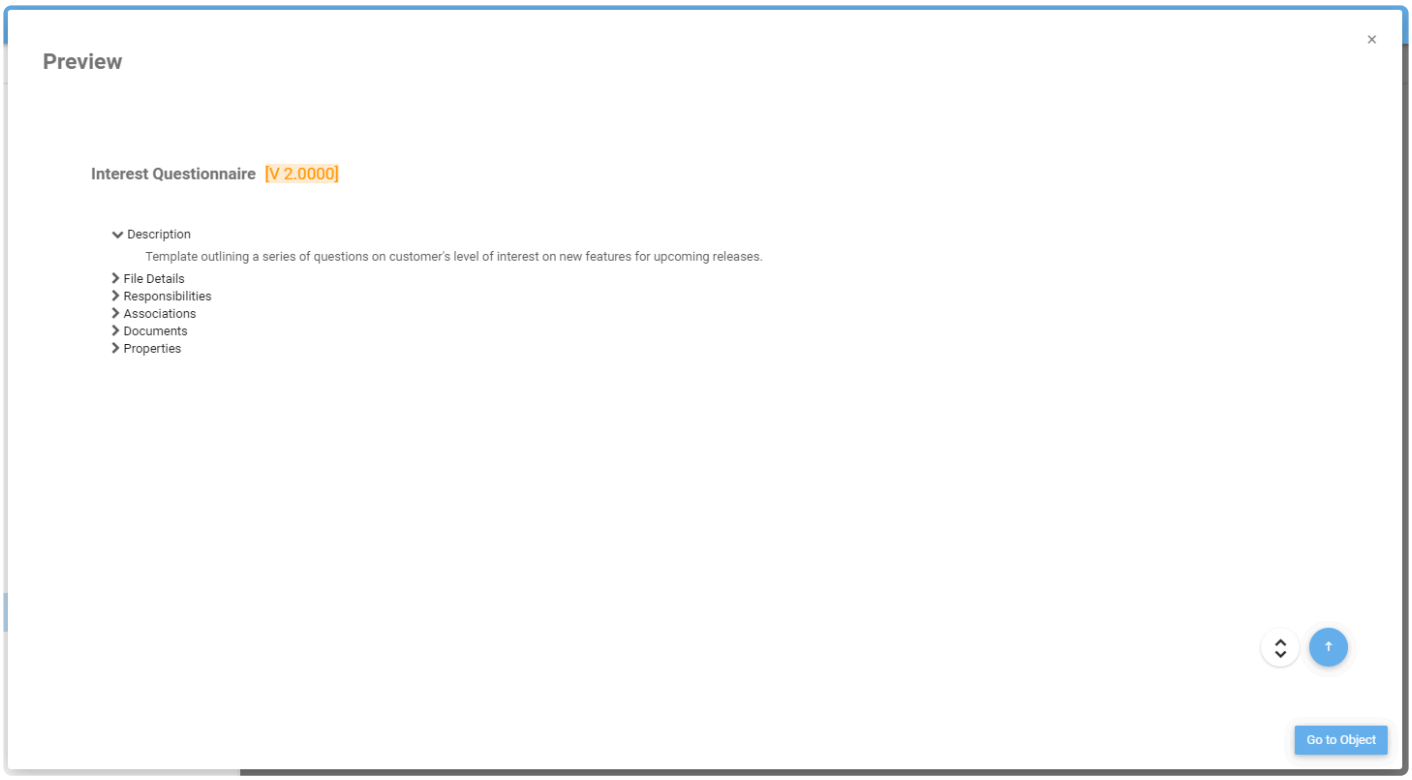
2. **Download**: To download the document click on the icon

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 •	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

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

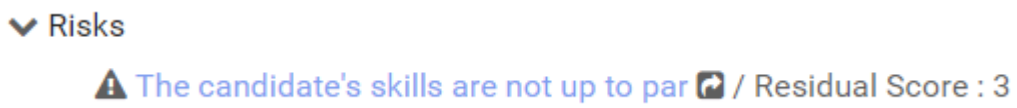
Users can click on the object's name to view its details in a popup. To navigate to the object's details page, click on **Go To Object**



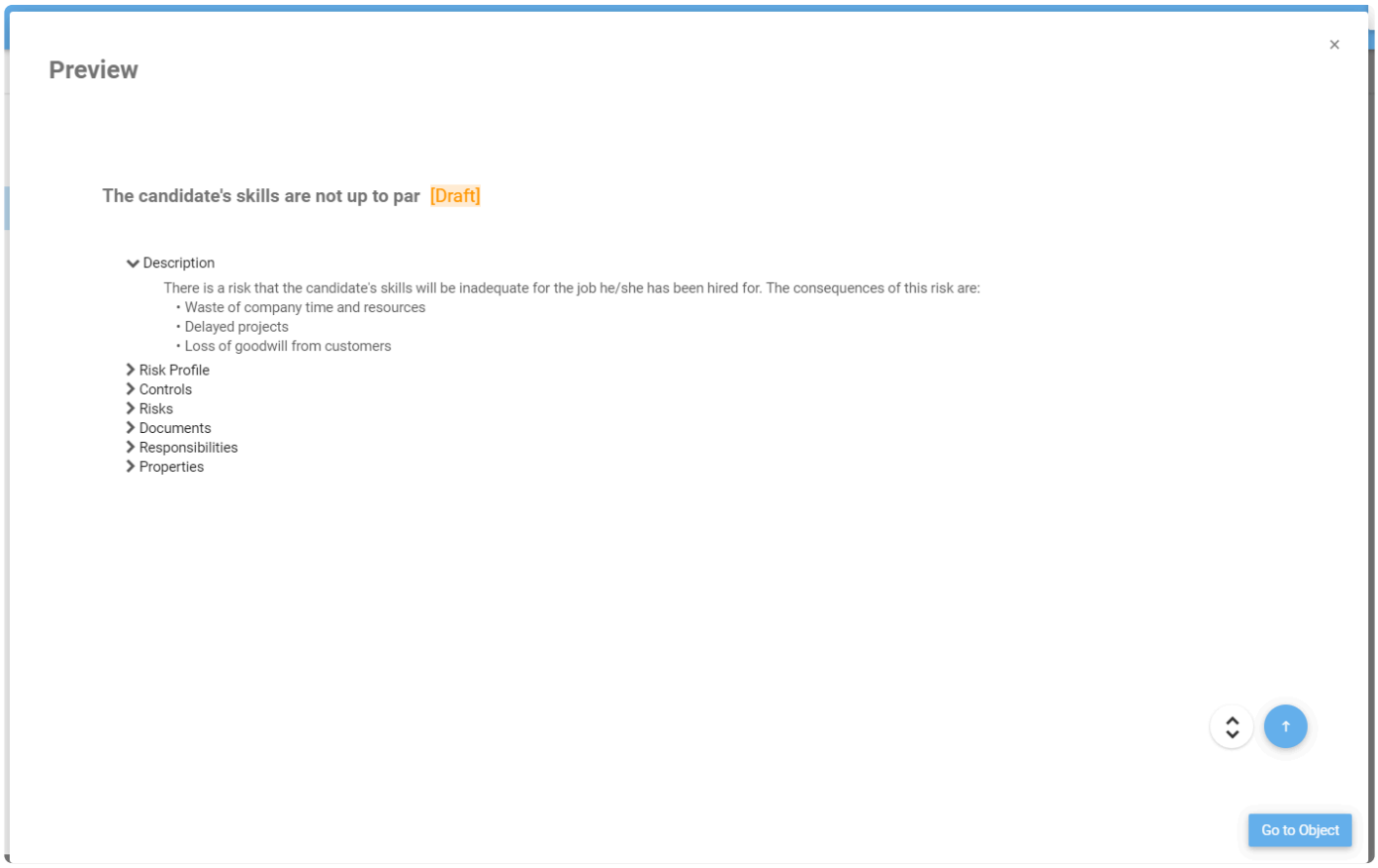
4.9.4.2.3 Risks

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

To navigate directly to the object, click on the icon.



Users can click on the object's name to view its details in a popup. To navigate to the object's details page, click on **Go To Object**

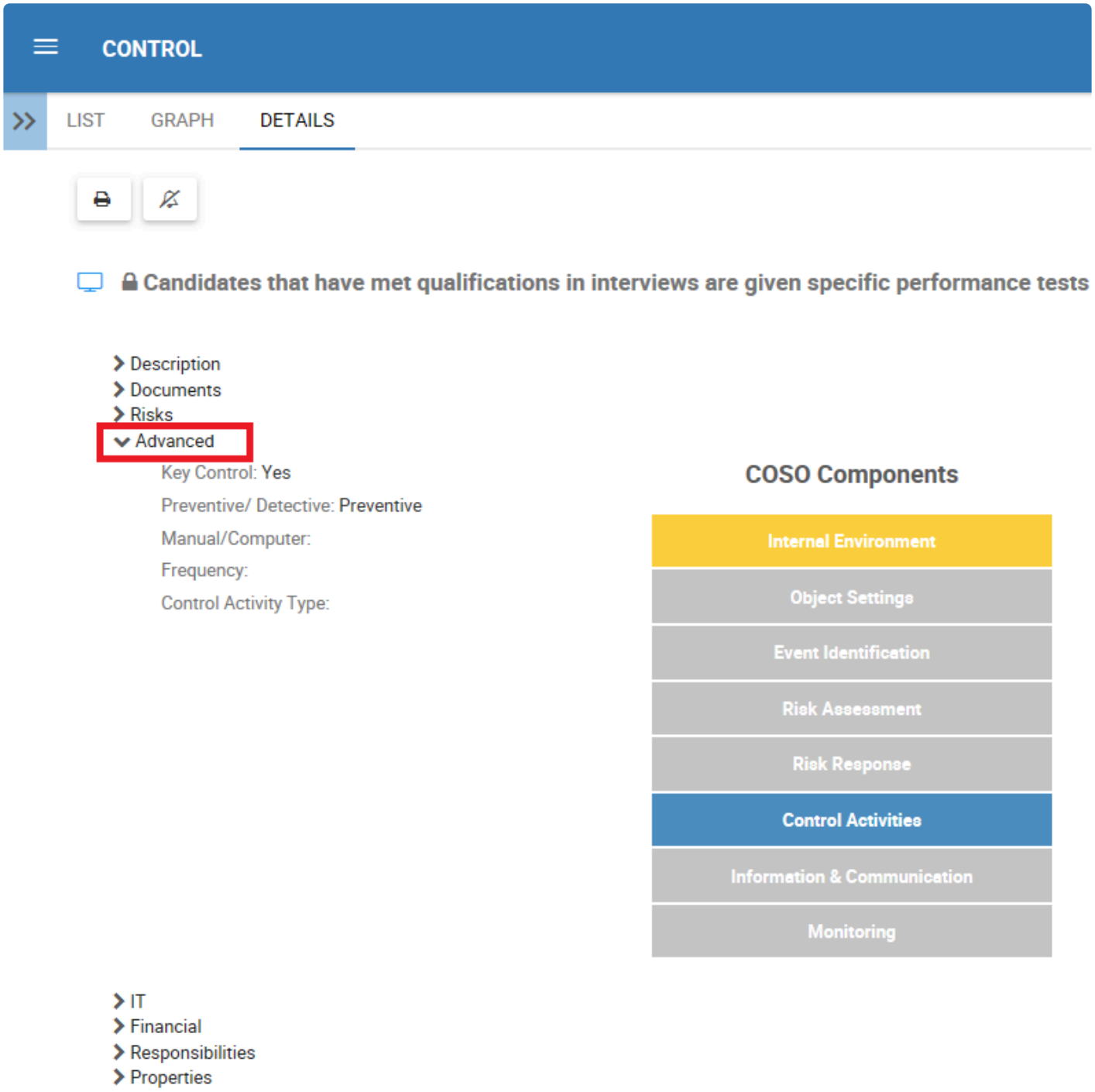


4.9.4.2.4 Advanced

The Advance section displays advanced functionalities to analyze the Control.

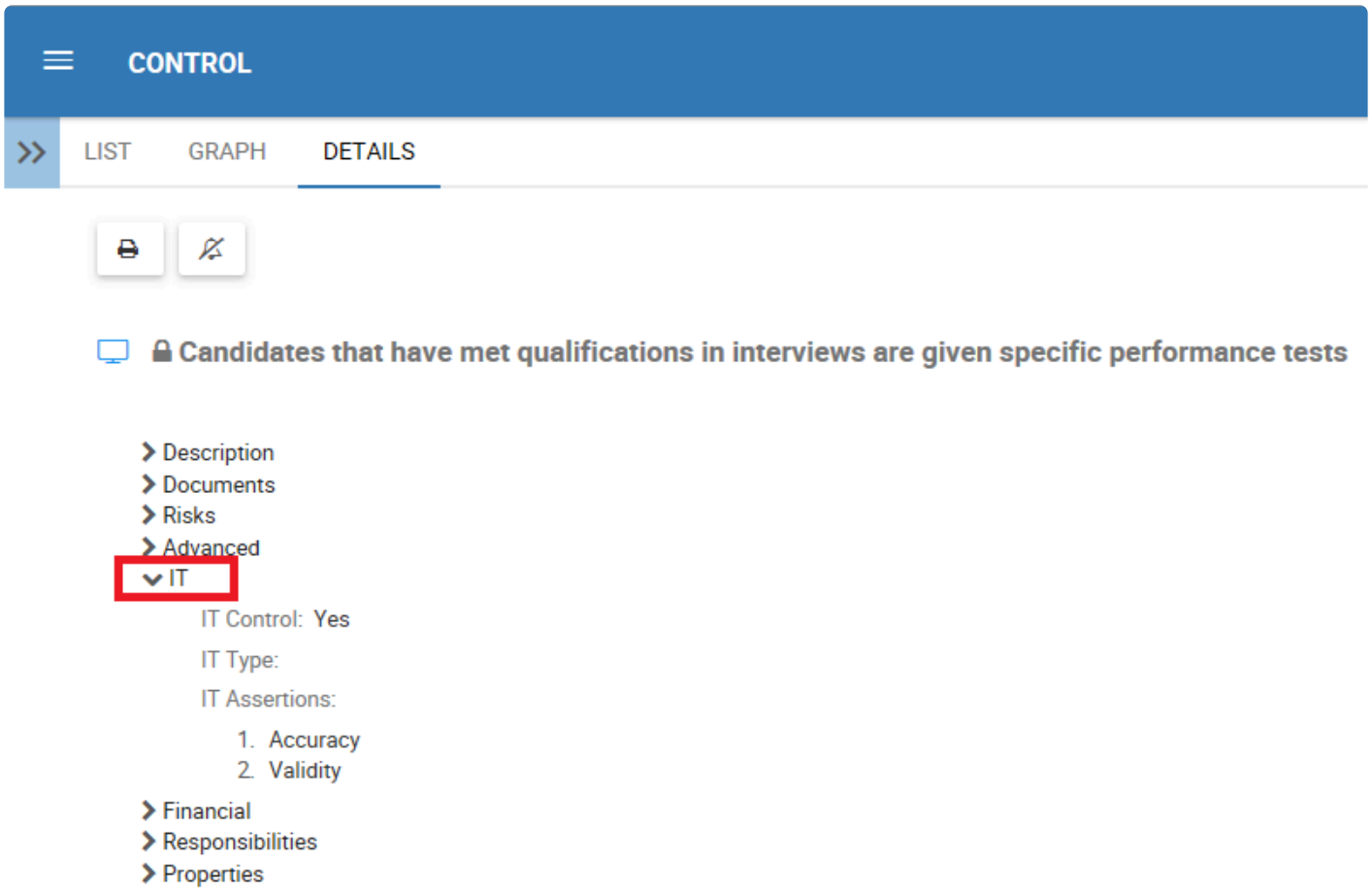
It displays if there is a Key Control or not, if the Control is Preventive or Detective, if the Control is done Manually or by a Computer, the Control's Frequency, and the Control Activity Type.

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

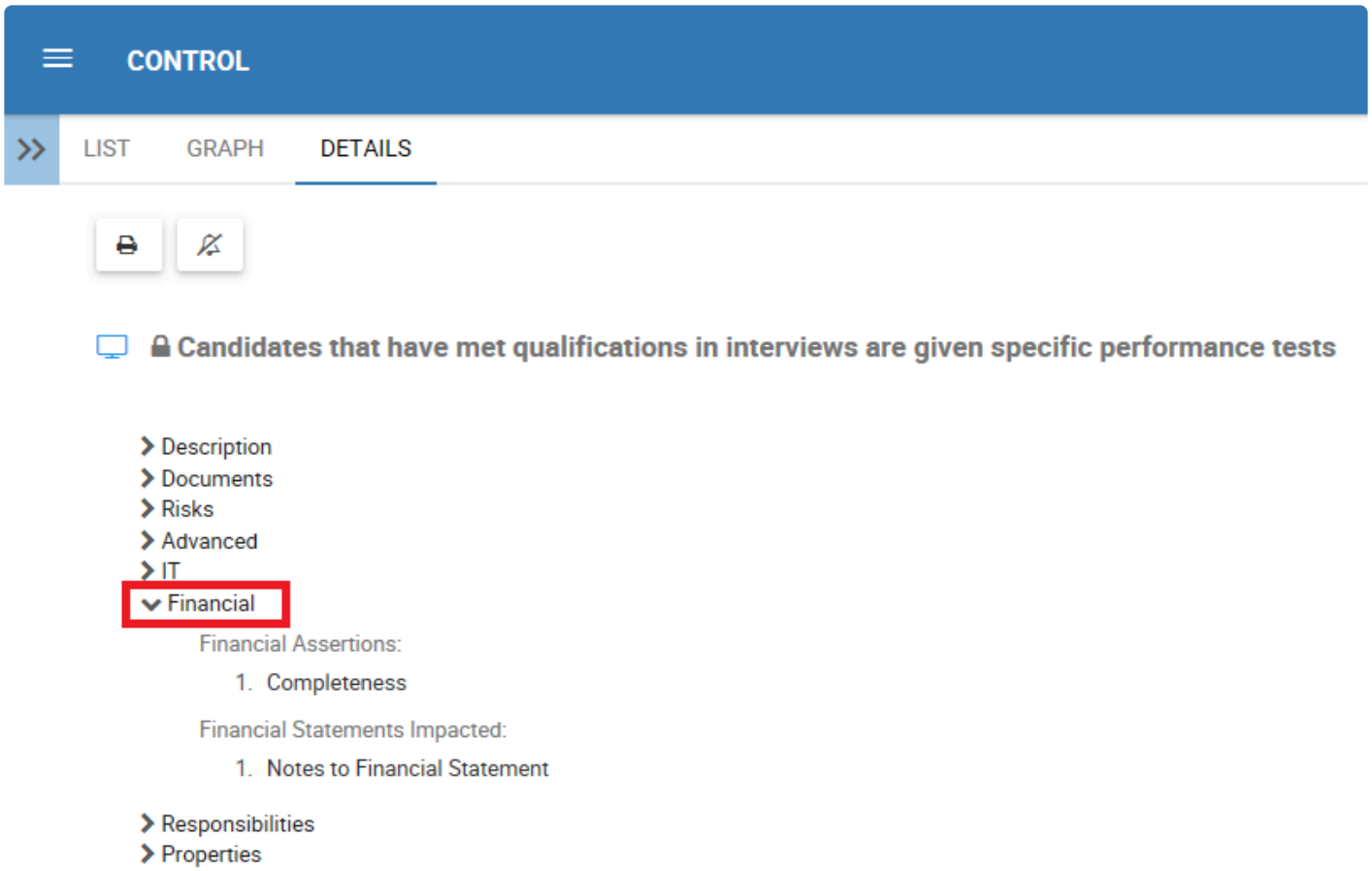
4.9.4.2.5 IT

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



4.9.4.2.6 Financial

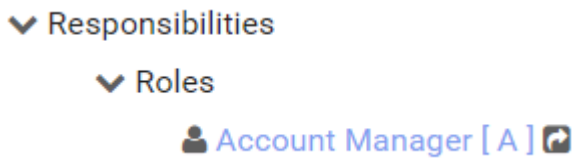
The Financial section displays the Financial Assertions associated to the Control and which Financial Statements are impacted by the Control.



4.9.4.2.7 Responsibilities

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

To navigate directly to the object, click on the icon.



Users can click on the object's name to view its details in a popup. To go to the object's detail page, click on **Go To Object**

4.9.4.2.8 Properties

The properties section provides users with additional key information about items. The properties section is broken down into 3 categories:

1.**Current Version**: Provides information about what version is being viewed, and when the latest modification has been made
2.**Version History**: Provides information on previous versions of the control. Includes major and minor versions, status, author and date.
3.**Analysis**: Provides information that better allows users to analyze items and related key details.

Current Version

Version Number: 0.0007

Last Modified: a month ago

Version History

Version Number	Status	Author	Date
0.0007	In Progress	Dia Apostolakis (Dia)	February 13, 2019 2:31 PM
0.0006	In Progress	Dia Apostolakis (Dia)	February 13, 2019 2:30 PM
0.0005	In Progress	scott Armstrong (Scott)	December 14, 2018 12:25 PM
0.0004	In Progress	scott Armstrong (Scott)	December 14, 2018 12:25 PM
0.0003	In Progress	scott Armstrong (Scott)	December 14, 2018 12:25 PM
0.0002	In Progress	scott Armstrong (Scott)	December 14, 2018 12:24 PM
0.0001	In Progress	scott Armstrong (Scott)	December 13, 2018 8:47 AM

Analysis

FREQUENCY	Yearly

4.9.4.2.9 Impacts

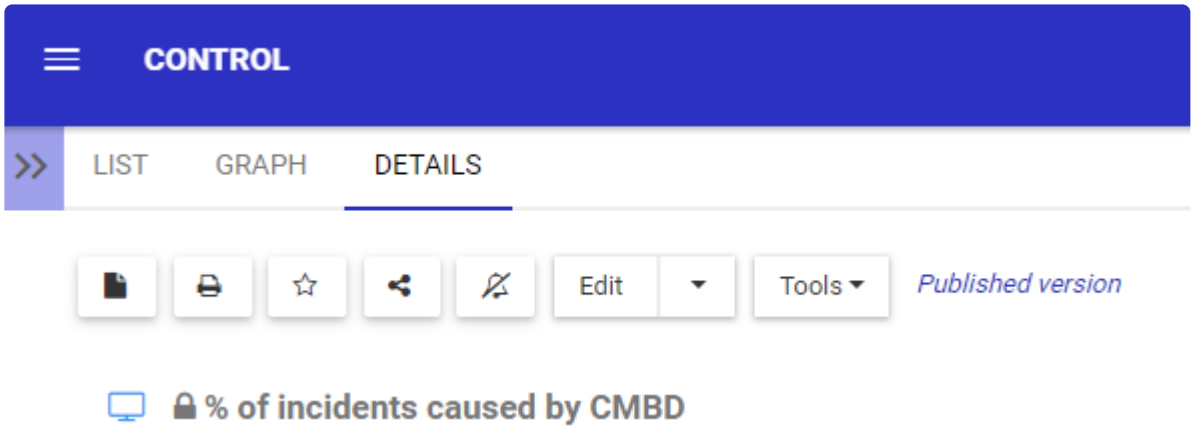
Users are able to view the impacts an object has on others in a list form in the Details view of any object. It is a complement to the Impact Graph, and another way of visualizing impact data.

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 to an object. Impacts 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.

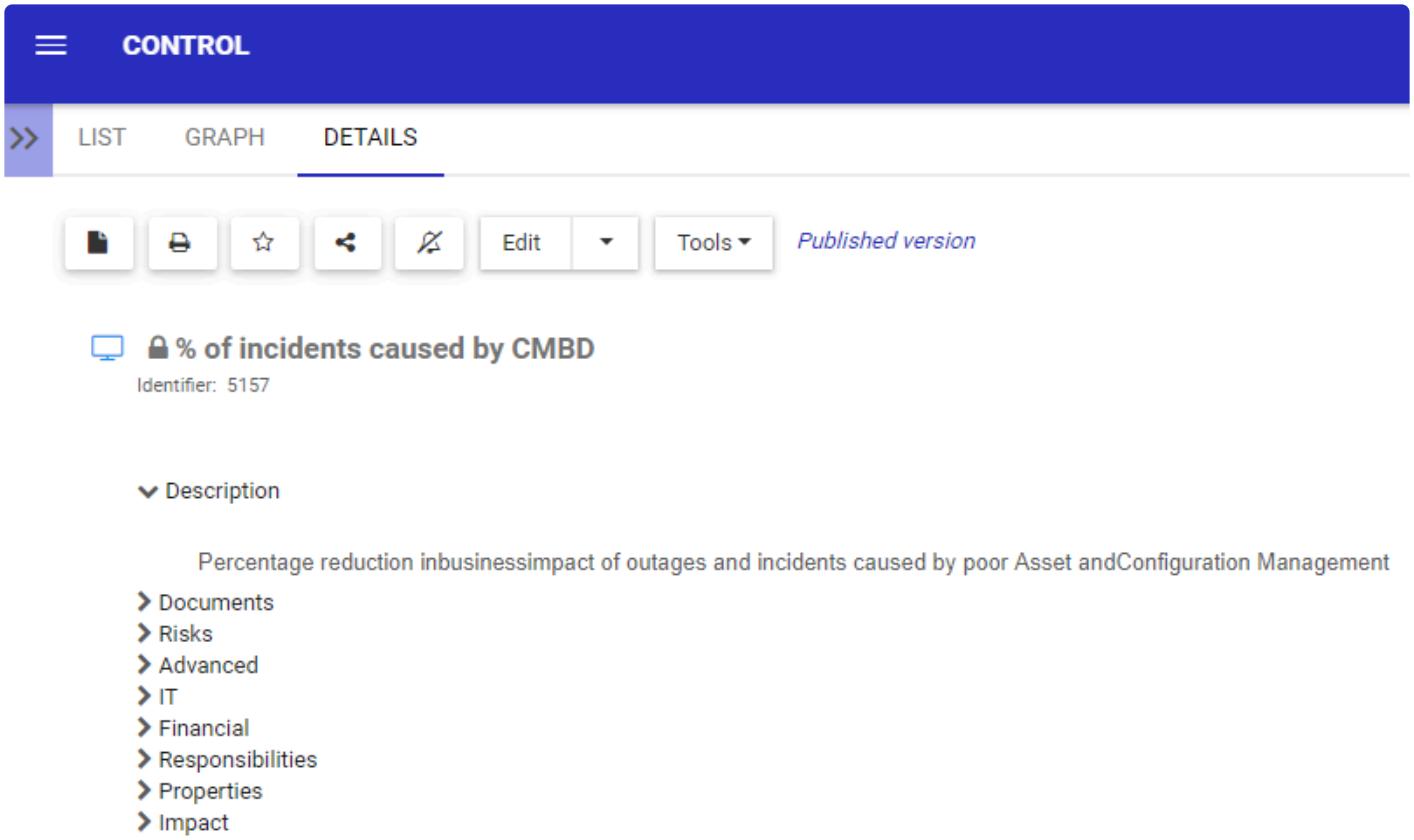
> The impact list will only show **direct** impacts, as opposed to the impact graph, which can be expanded to show **indirect** impacts on an object

Navigating to the Impact List

1. Navigate to any Detail page of any object in EPC



2. At the bottom of the Details page, click on Impact to expand the section



3. All direct impacts associated to the EPC Object will be listed.

> To sort a column by alphabetical order, click on it's header. The arrow pointing up indicates sorting in **Ascending Order**, the arrow pointing down indicates sorting in **Descending Order**, and no arrow indicates **No Sorting**.

Object Name A	Parent B	Object Type C	Assignment Type D	Justification E	Impact Type F	Status G
[Default Template] Analysis (A4 - Lands...	Default template folder	Document	Directly Impacts		Association	Published
Document should be reviewed every yea...	Import Folder	Rule	Directly Impacts		Association	Published
Enforce a zero-tolerance policy for dang...	Import Folder	Control	Directly Impacts		Association	Published
Onboarding cost	Imported Objective	KPI	Directly Impacts		Association	Published
Ratio of candidates to hires	Imported Objective	KPI	Directly Impacts		Association	Published
Risk B - with risk analysis!	Import Folder	Risk	Directly Impacts		Association	Published
Warehouse	Imported Measure Set	Objective	Directly Impacts		Association	Published

A	Object Name	The Name of the object. Click on the hyperlink to go to the object
B	Parent	The Parent of the object
C	Object Type	The type of the object
D	Assignment Type	The relationship type between the two objects
E	Justification	The justification of the object

F	Impact Type	How does this object impact the current object
G	Status	The status of the object (In Progress or Published)

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

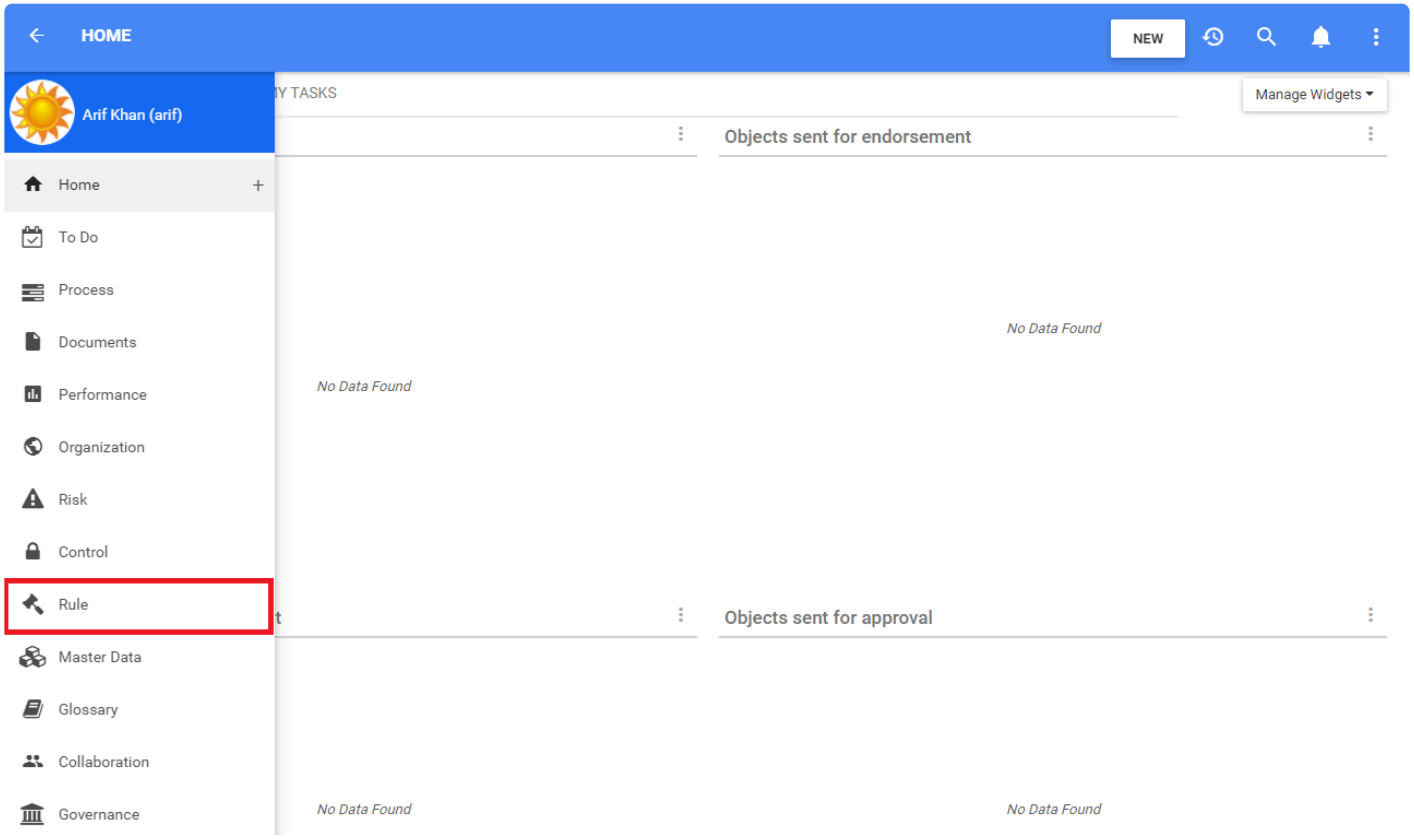
EPC's Rule Module allows users to view personal, role and company rules. The EPC provides 3 different dimensions, allowing users to properly view and understand their organizational structure.

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. No hierarchy filter	A list view where **all** items within the given module are listed
2. Current level & below	A list view where **all levels below** the selected item are listed
3. Current level	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
Risk	Whether or not there are Risks directly associated with the item in question
Subtype	Whether or not if this object is classified as a business type
Categories	Whether or not there are Categories directly associated with the item in question
Identifier	Textual search for any existing unique identifier of an object
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
Last Modified By	The name of the last resource that modified the object
Status	View the status of the item in question when Show Latest mode is on
Locked	Whether the item in question is currently locked or not

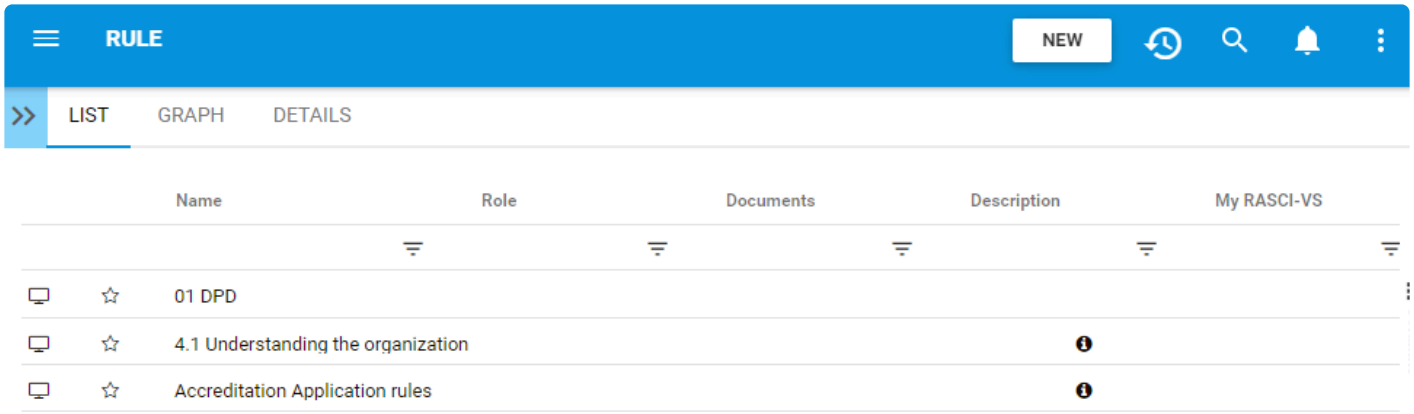
The selected list view will be saved both by web browser and by user.

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).

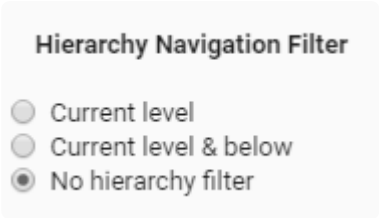


To simplify Rule viewing; users **are not** greeted with all major Rules that they are associated too. Users are greeted with the list of Rule Sets, the highest level of Rule Classification in the EPC. However users can display these risks within the **List View**. Please see the **Optional** steps below:

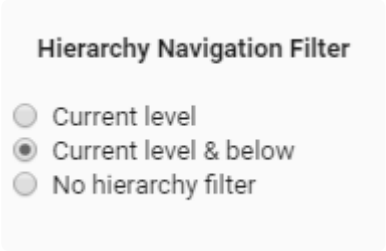
> These steps are only required if a user is using an account or browser for the first time. As noted above, list preferences will be saved by user and browser to simplify navigation.

4. **(Optional)** To view sub-processes, users must select the filter panel and then select “Current level & below of the EPC Web App.

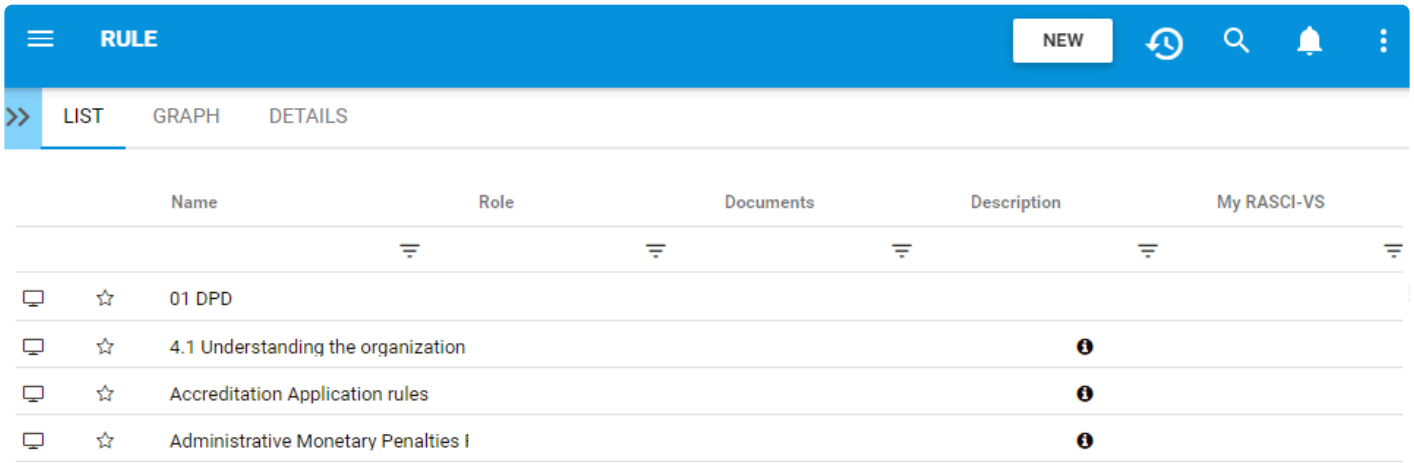
5. **(Optional)** Click on the filter setting and it will generate a list view



6. **(Optional)** Select “Current level & below”



7. **(Optional)** Upon selecting the “Current level & below”, the EPC will automatically refresh the page



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

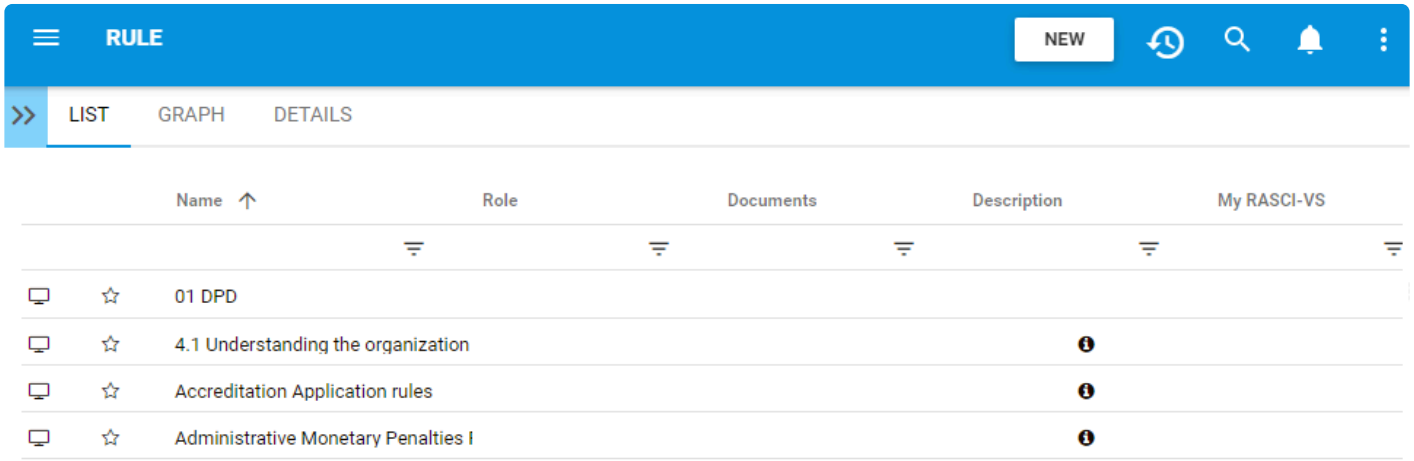
1. Navigate to the Rule Module

2. Navigate Cursor to desired **Category**

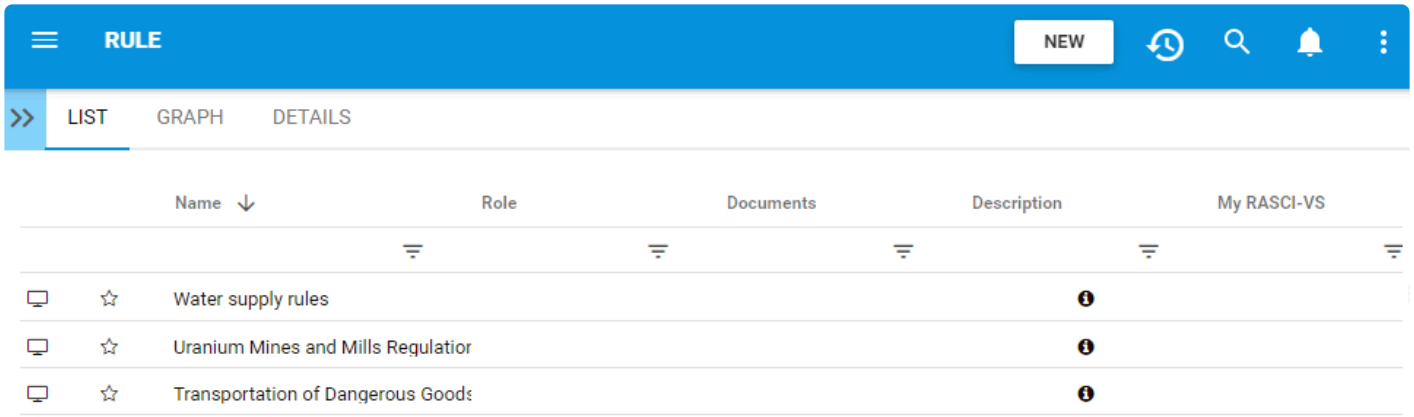
3. Click on the **Category**

1-To sort the Category in Ascending order, click on ▲
2-To sort the Category in Descending order, click on ▼
3- Click a third time to Remove the sorting action

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



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


RULE
NEW
LIST
GRAPH
DETAILS
Name
Role
Documents
Description
My RASCI-VS
Water supply rules
Uranium Mines and Mills Regulatior
Transportation of Dangerous Goods

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
Risk	Empty – The object has no associated risk Not-Empty – The object has at least one associated risk
Rule	Empty – The object has no associated rule Not-Empty – The object has at least one associated rule
Subtype	Empty – The object does not have a business type associated Not-Empty – The object has at least one business type associated
Categories	Empty – The object has no category associated Not-Empty – The object has at least one associated category
Identifier	Empty – The object does not have a unique identifier Not-Empty – The object has a unique identifier
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

Last Modify By	Textual search of last resource who last modified an object
Status	Shows the status of the item in question (published vs in-progress) Sent for Review Approved Rejected Under Revision Revised
Locked	False – The object isn't locked True – The object is locked

The Filtering section will cover the following:

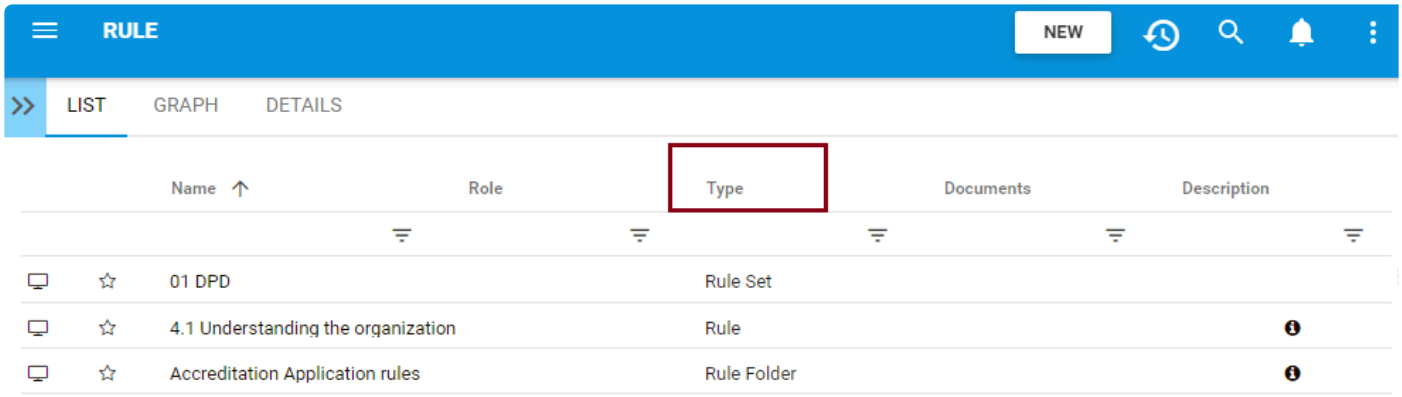
1. How to Add Filters
2. How to Remove Filters
3. How to Combine Filters

4.10.2.2.1 Add Filter

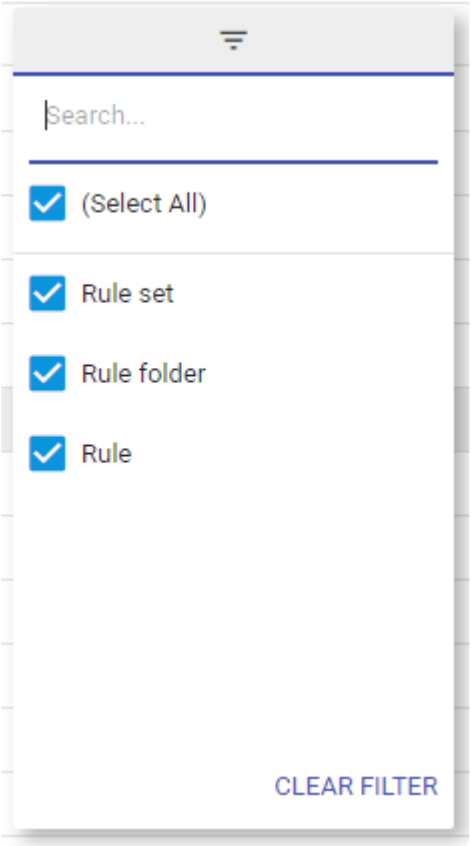
You can add filters to see Rules and other items of your choice. **Type** what you are looking for, **select** the filter in the drop-down menu, or **define the range of dates.**

How to Add Filter

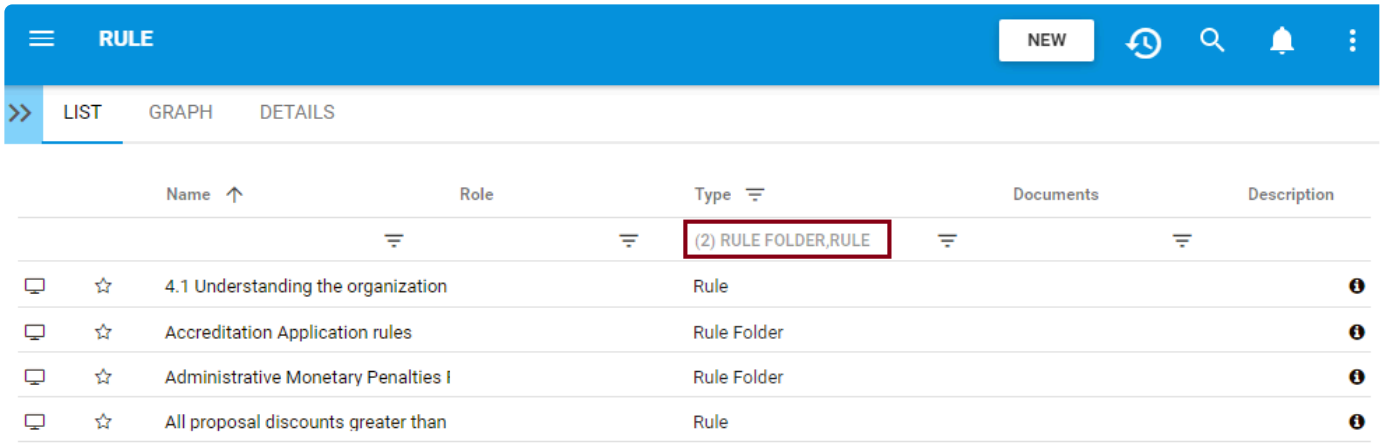
1. Navigate cursor and select the box column you wish to filter. For this example, we will use **Type.**



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



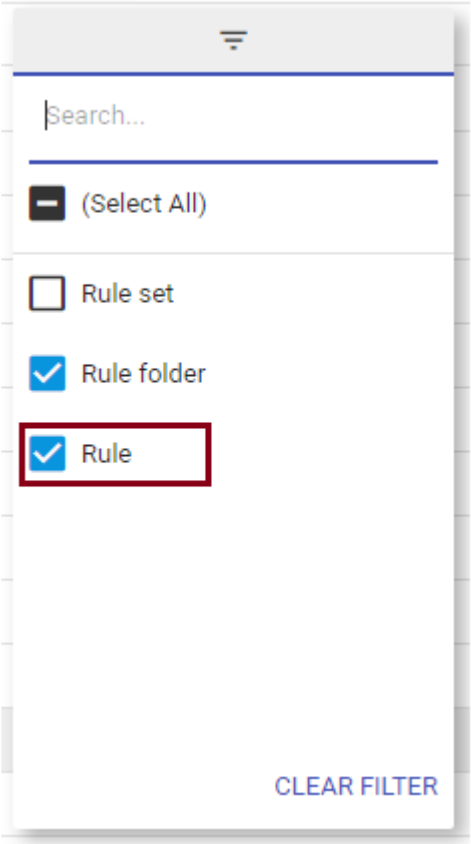
3. Select the desired filter. For this example, we will select **Rule** and **Rule Set.**


RULE
NEW
LIST
GRAPH
DETAILS
Name
Role
Type
Documents
Description
(2) RULE FOLDER,RULE
4.1 Understanding the organization
Rule
Accreditation Application rules
Rule Folder
Administrative Monetary Penalties I
Rule Folder
All proposal discounts greater than
Rule

4.10.2.2.2 Remove Filter

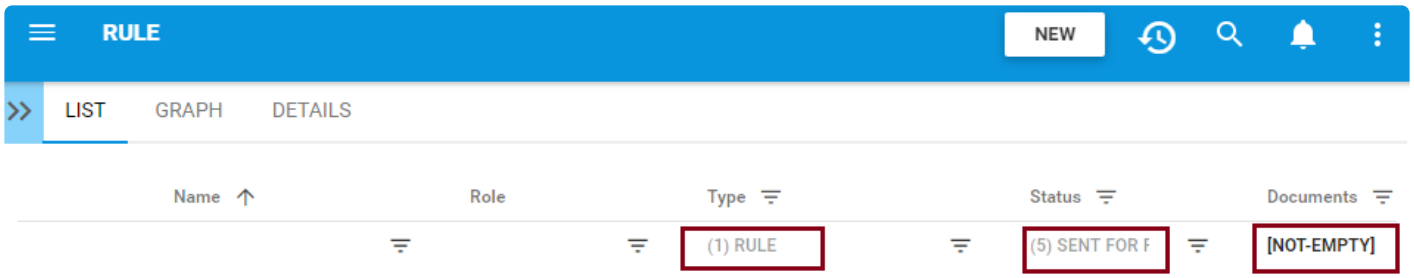
You can remove filters; this will naturally increase the results in your list.

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



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**.



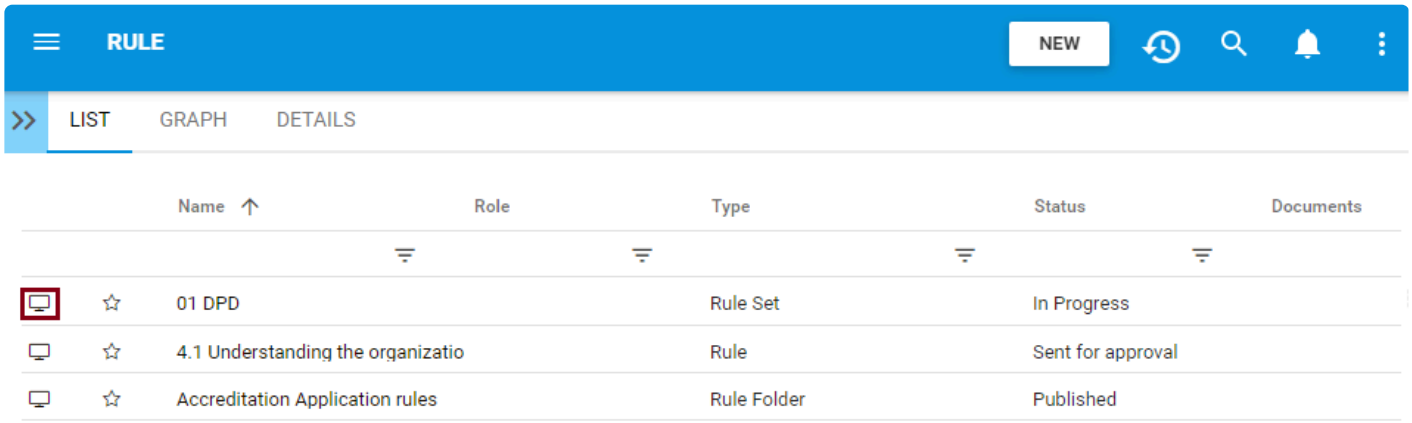
4.10.2.3 Quick Graph View

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".

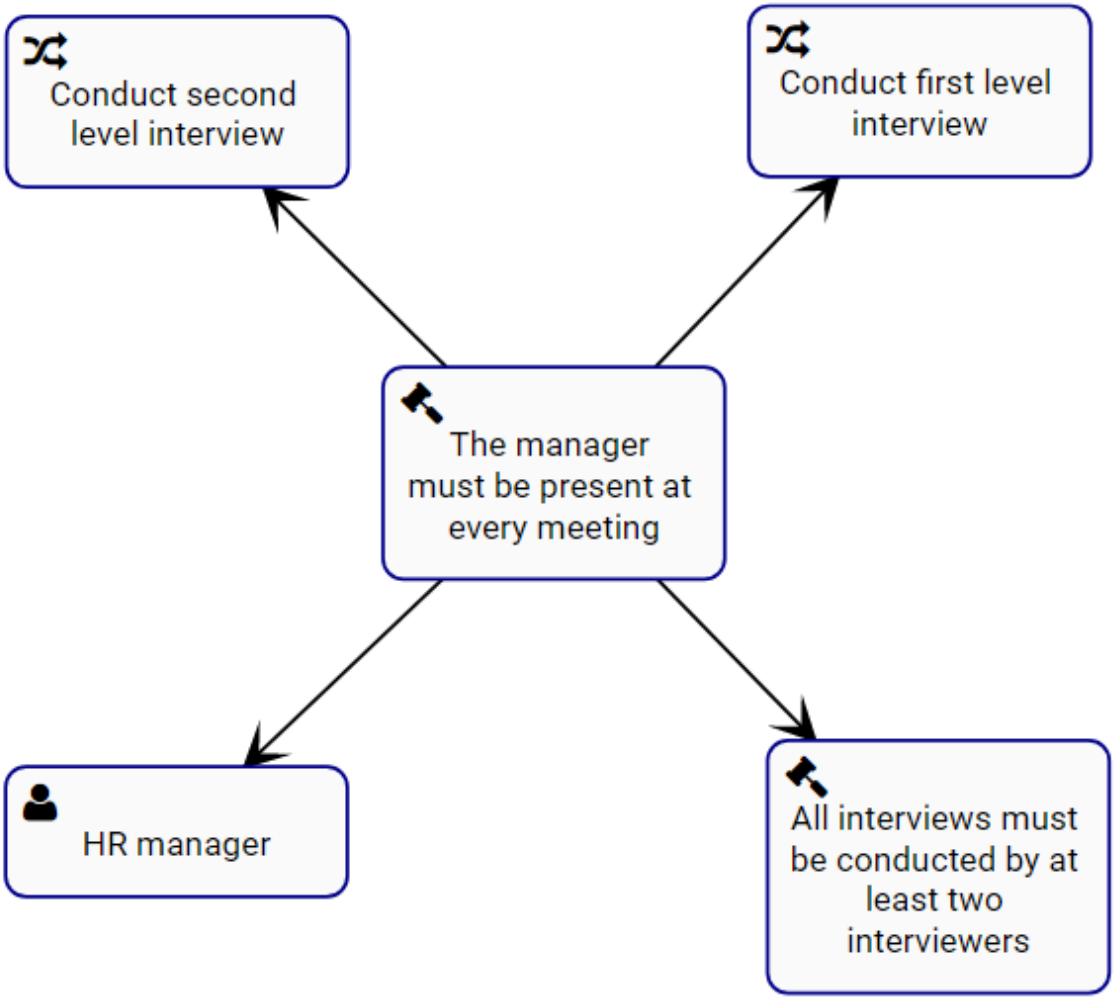
Please see the instructions below:

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.



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

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.

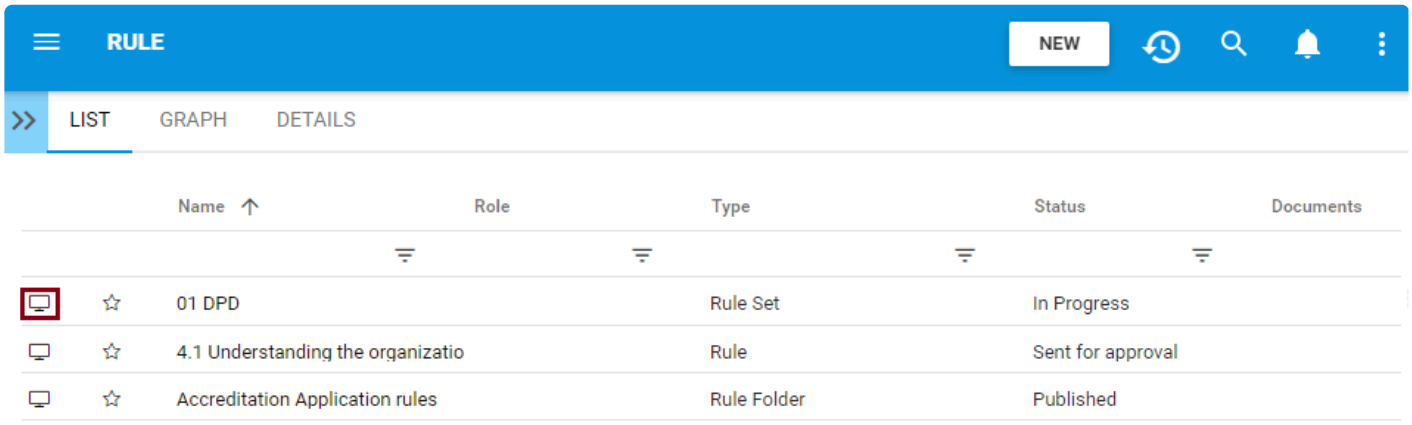
How to navigate to the Graph section (Manual Navigation)

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

2. Click on **Rule**

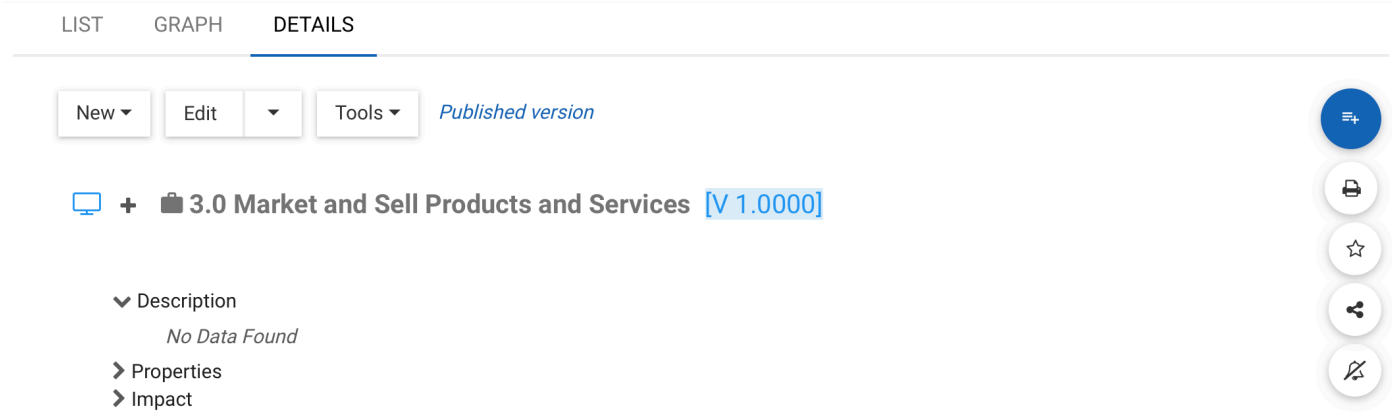
3. By default, you will be directed to **List View** in the Rule module.

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

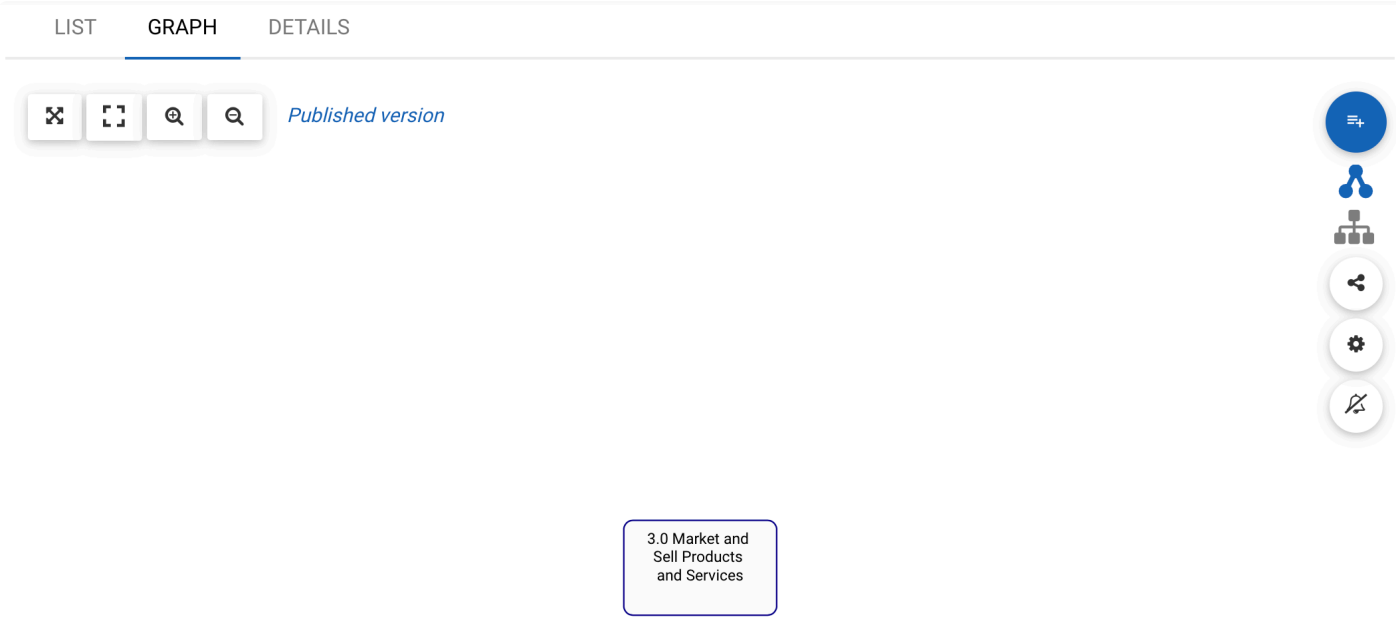


5. You will be prompted to the item’s details page

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

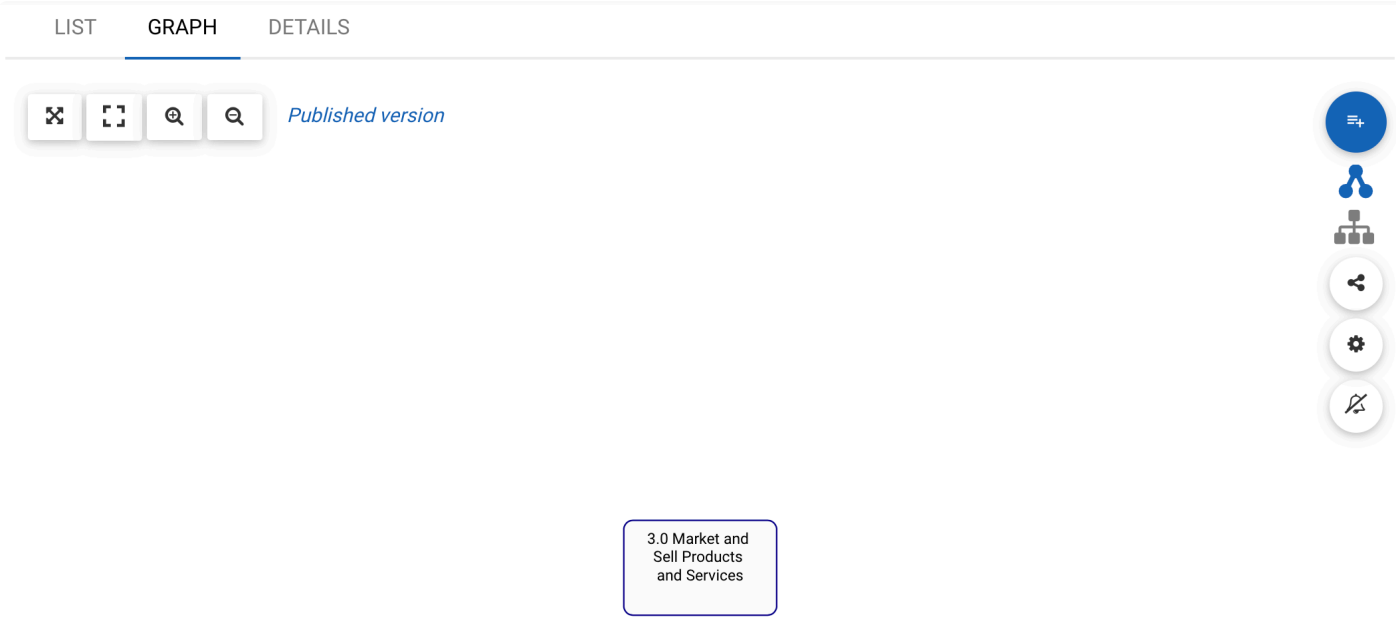


7. You will be navigated to the Graph section. By default, users will be sent to Impact view as the default Graph view. An example of this view can be seen below.



4.10.3.1.1 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

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
Share		Copies URL to user's clipboard to share
Settings		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.

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

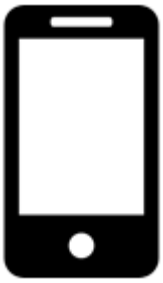
4.10.3.1.1.3 Zoom in

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

Coming Soon

4.10.3.1.1.6 Settings

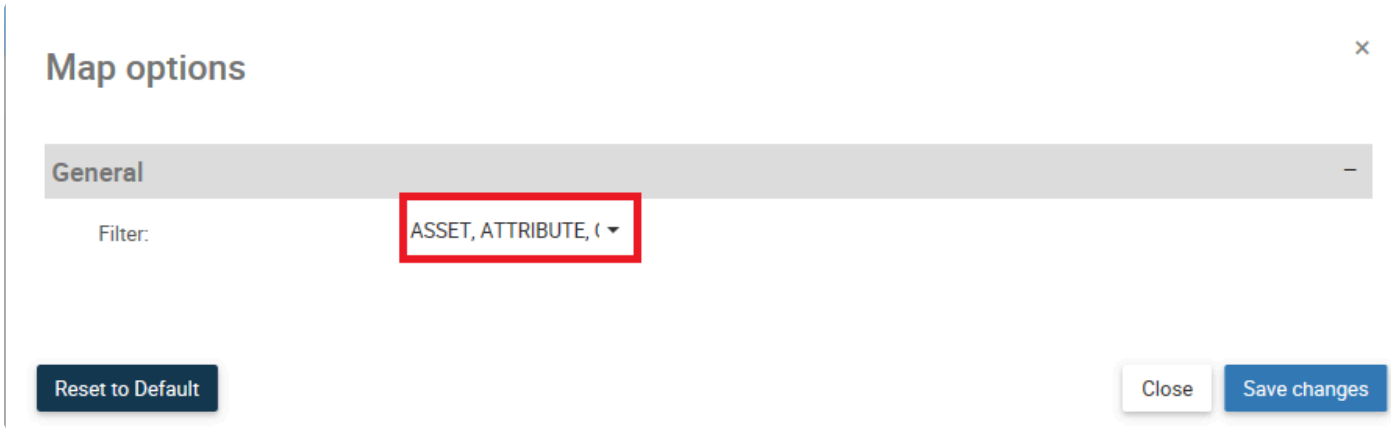
The Options button has been added to allow users to customize the Graphs they view. Customization allows users to select exactly what is displayed in each graph, allowing them to prioritize key information in a format of their choice.

This section will cover navigation to the options button.

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

1. Select “Settings” icon

2. Navigate cursor to “Asset, Attribute”



3. The drop-down menu will be generated

4. Select the desired filter and select “Save Changes”.

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.

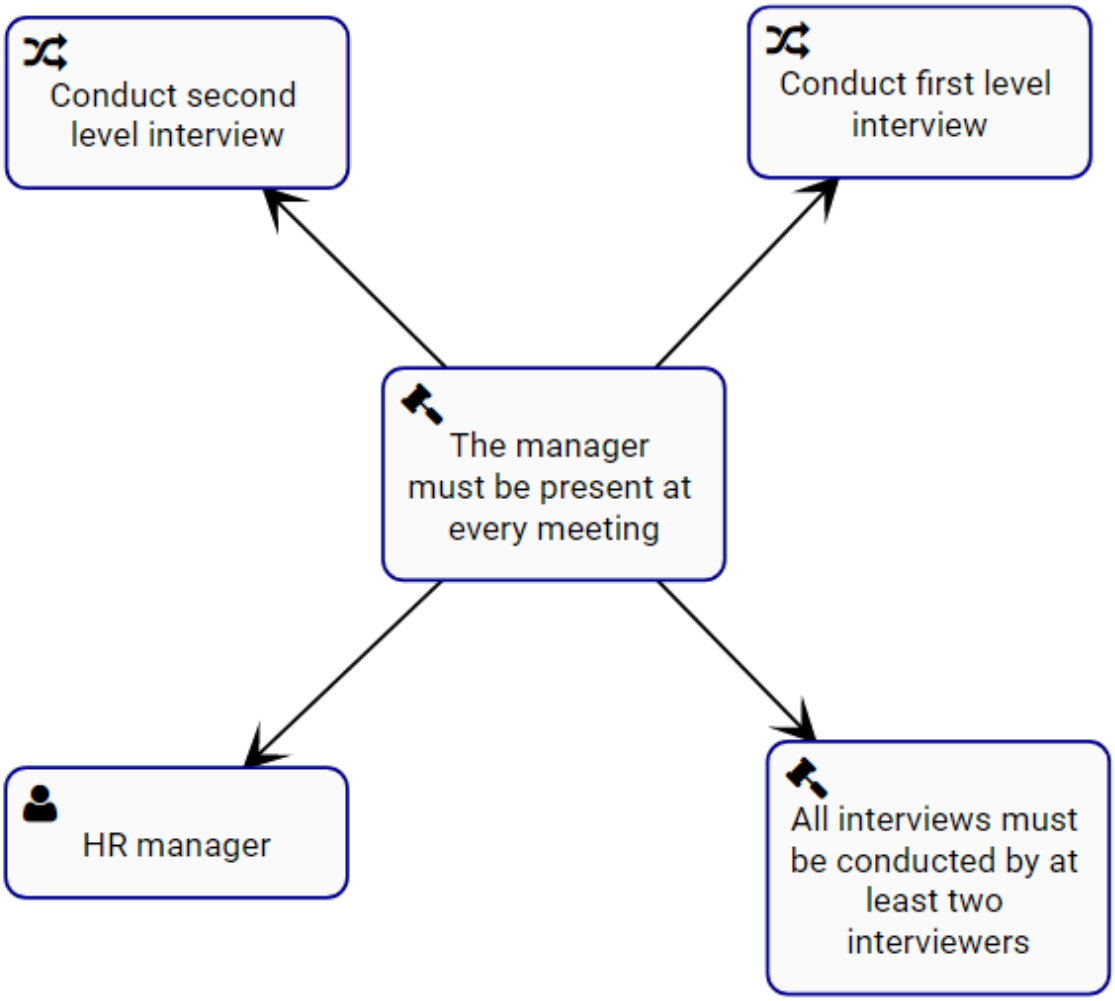
To use the Subscribe button, please see the following instructions.

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

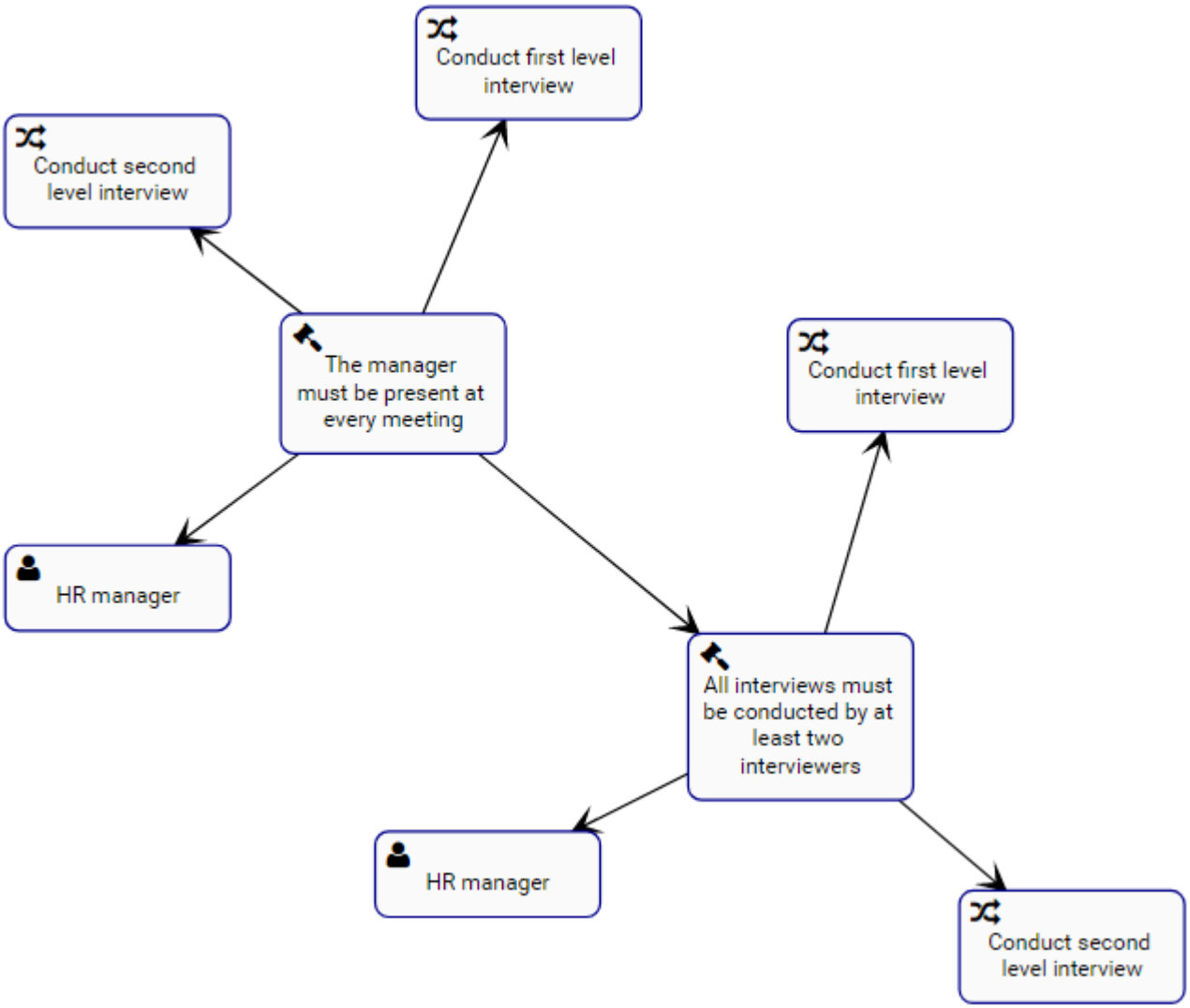


The example features the Impact Graph of the “The Manager Must be Present at Every Meeting” Rule. The Rule itself is associated to a Role “HR Manager”, to another rule “All interviews must be conducted by at least two interviewers”, and to two tasks “Conduct first level interview” and “Conduct second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



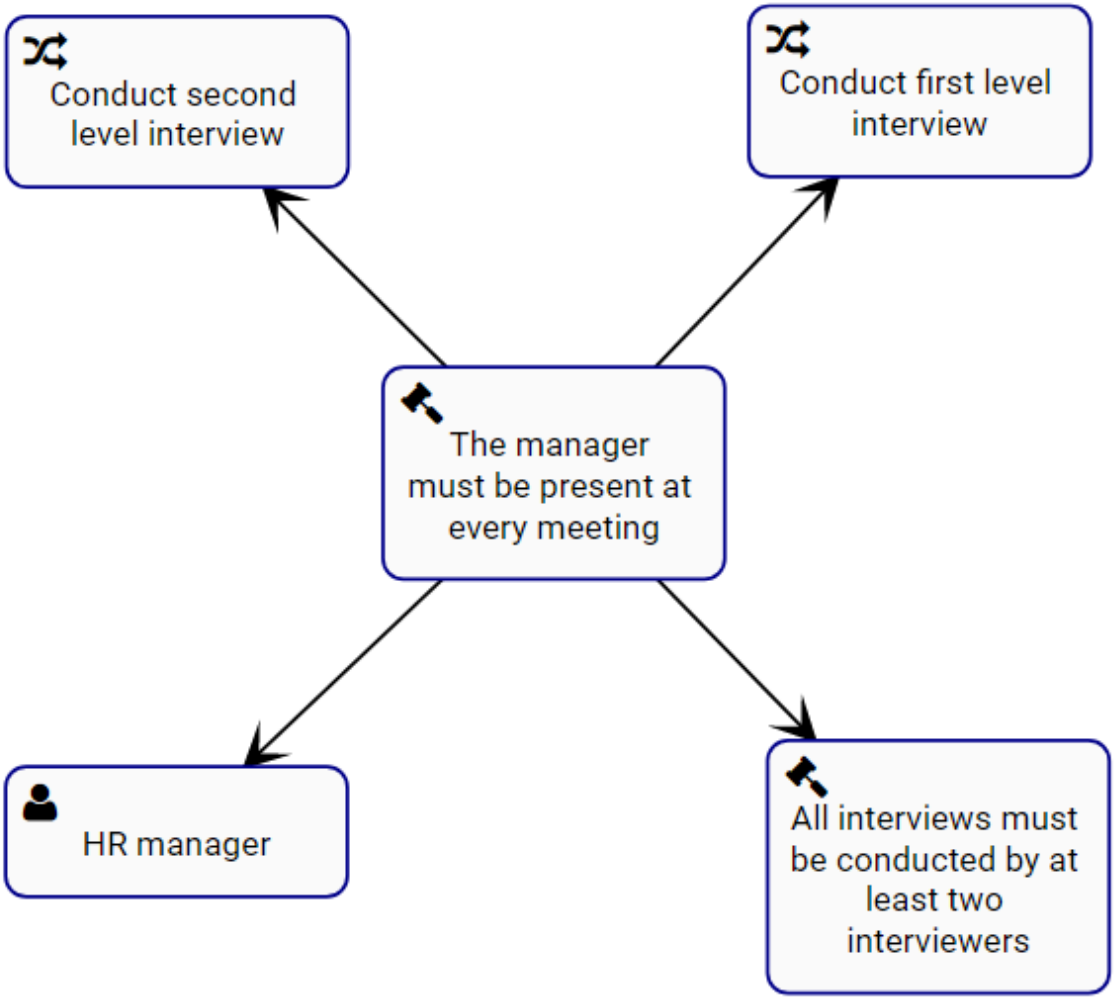
These Impact Graphs can be used to educate business users, to analyze internal business processes and help management optimize activities effectively. Additionally, they help in the preparation of change management plans, allowing managers to map out the effect of any organizational change

Impact Graph Navigation

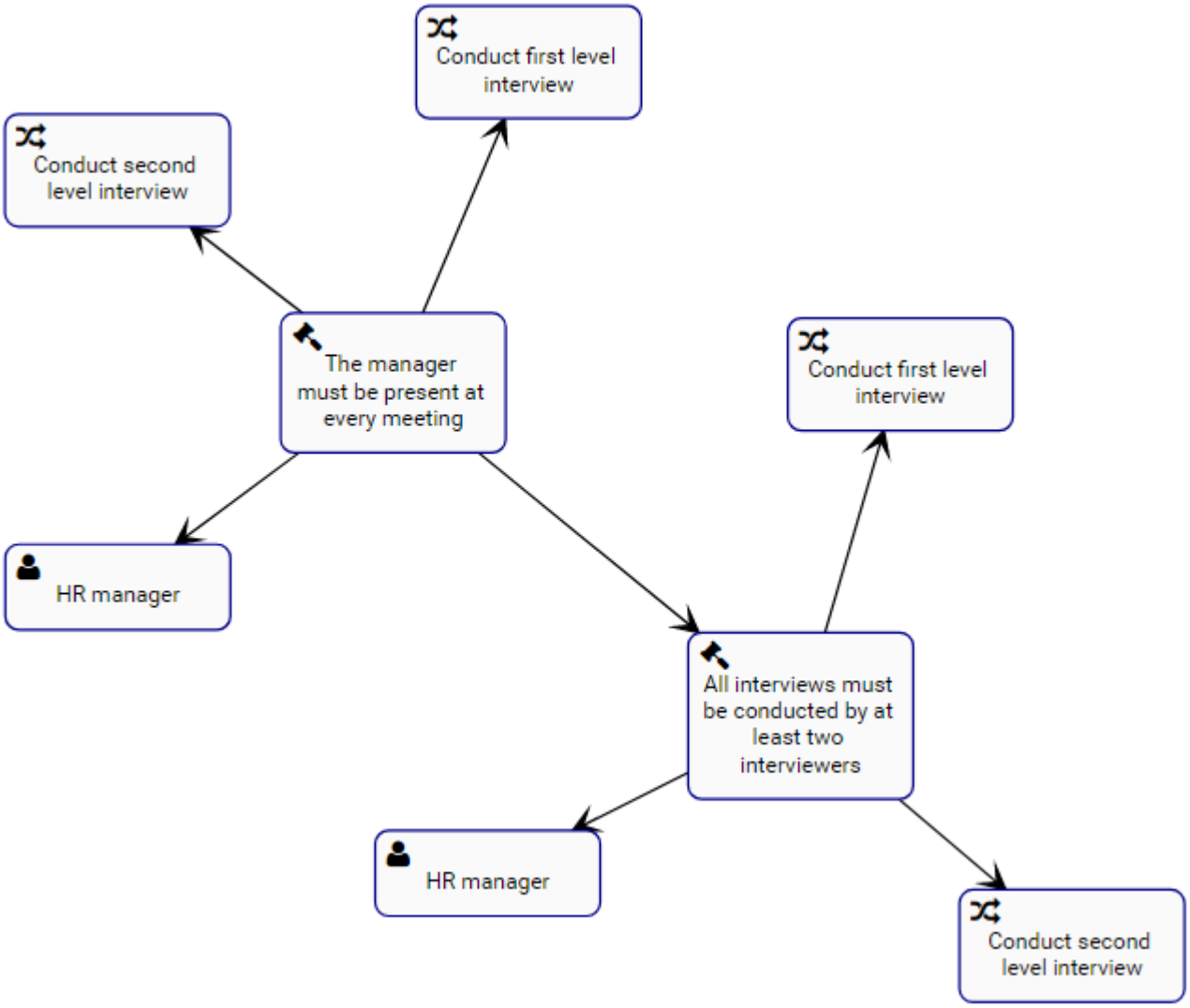
To navigate to Impact Graphs, please see the following instructions.
1. Navigate to a Rule within the Rule Module

2. Click on the Quick Graph View icon

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



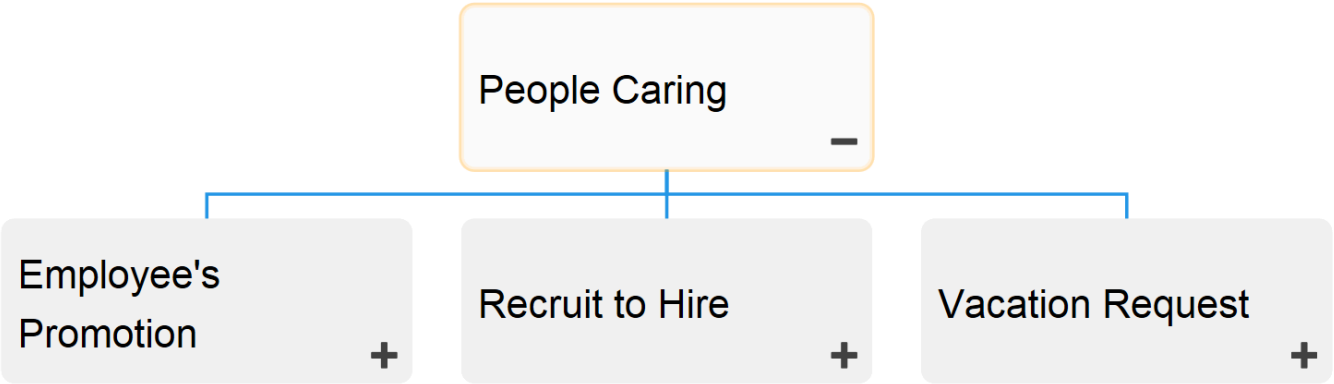
4. (Optional) To further expand the Impact Graph, simply double-click on the item to which you would like to display


Conduct first level interview
Conduct second level interview
The manager must be present at every meeting
Conduct first level interview
HR manager
All interviews must be conducted by at least two interviewers
HR manager
Conduct second level interview

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

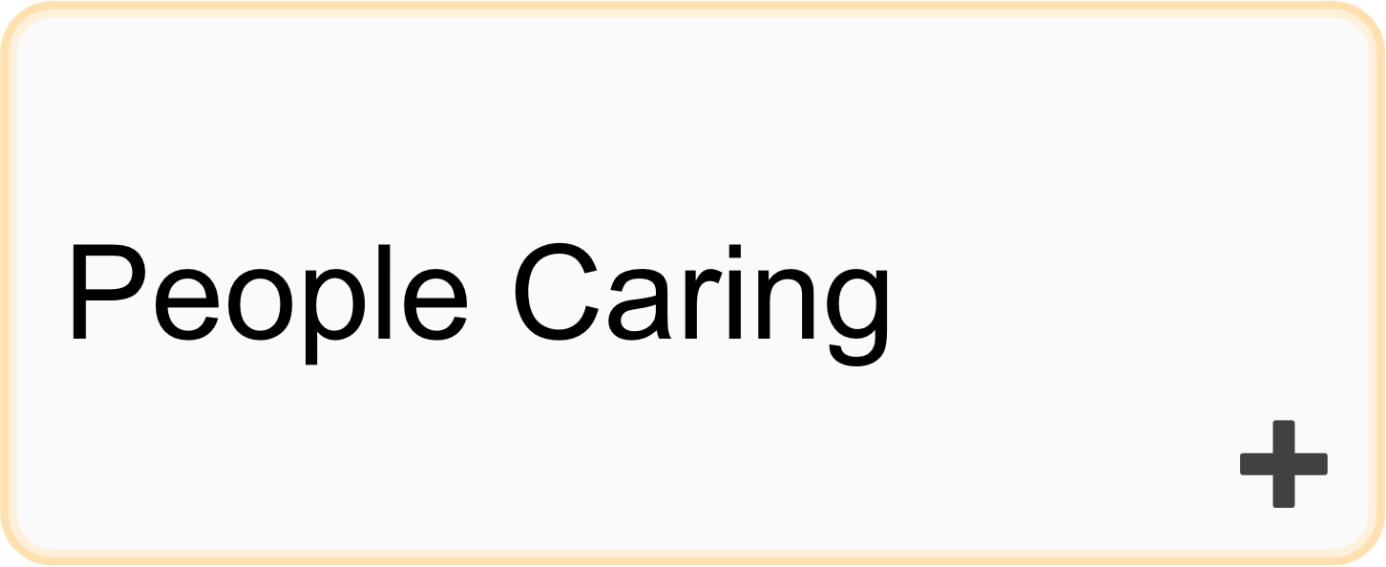
2. Select the item to which you would like to view.

> 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

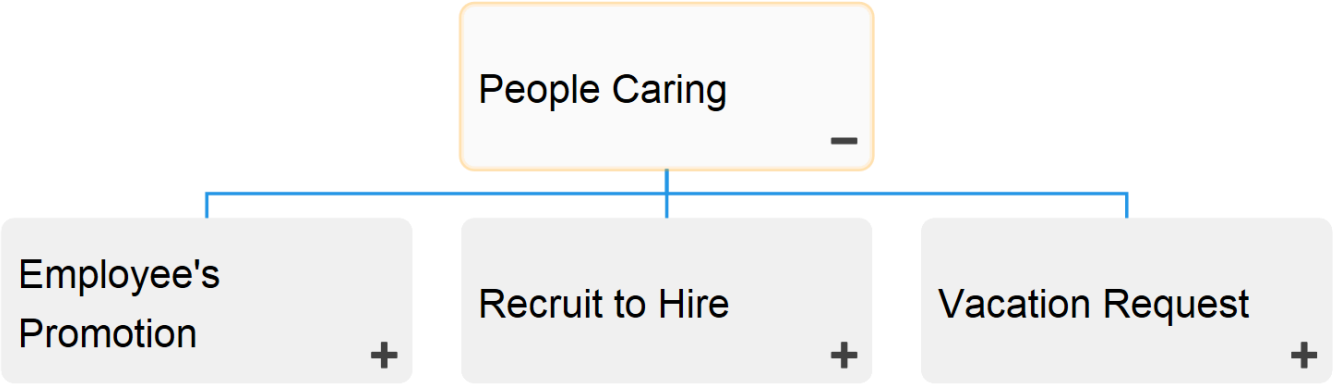
3. Select the Quick Graph View icon of the desired item

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.

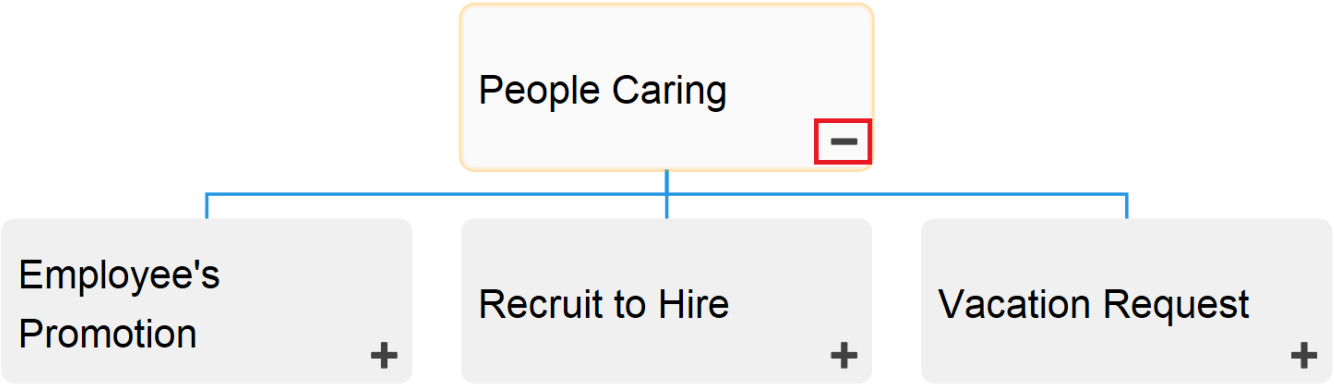


6. To further expand components of the Hierarchy Graph, double click on the on the objects in the Graph. This will expand the item selected.



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

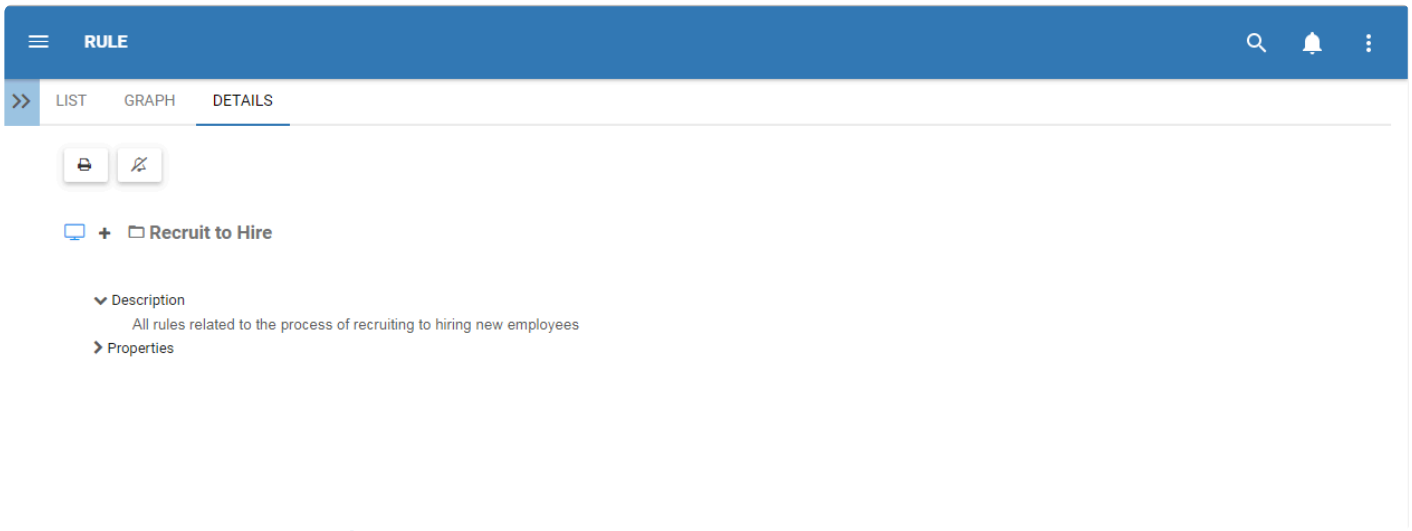
8. To close opened items, double-click on the icon


People Caring
Employee's Promotion
Recruit to Hire
Vacation Request

4.10.4 Details

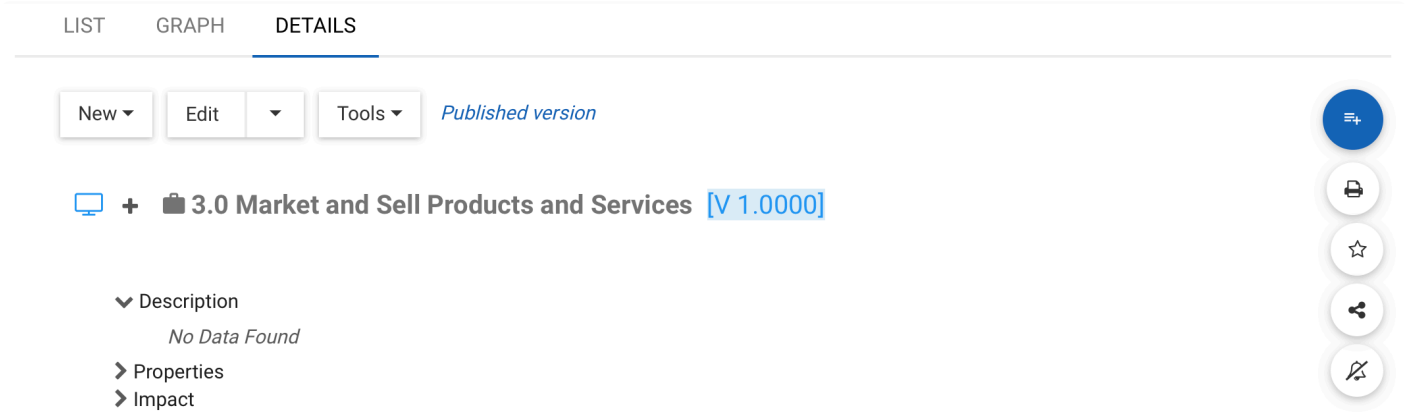
The Description section is where you will find details about the Rules folders, Rule Sets, or Rules you are observing. This rich text area allows for the display of all additional details that has been uploaded regarding the item in particular. These details provide users with all critical information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

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



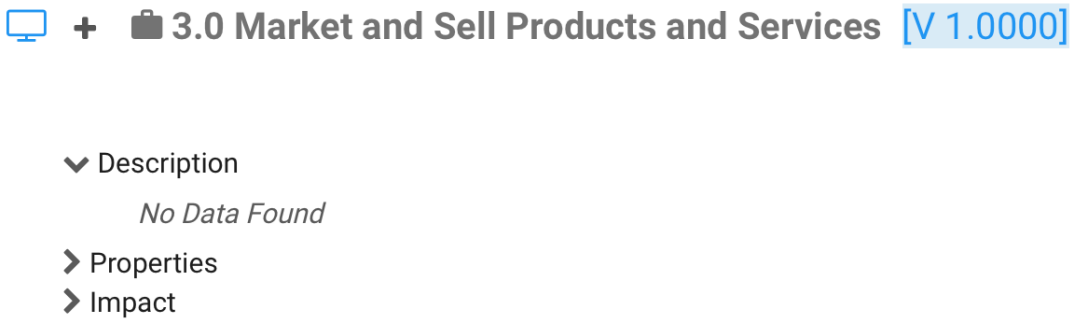
4.10.4.1 Navigation

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

3.0 Market and Sell Products and Services [V 1.0000]

Description

No Data Found

Properties

Impact

Lead to Cash [V 1.0000]

Description

No Data Found

Properties

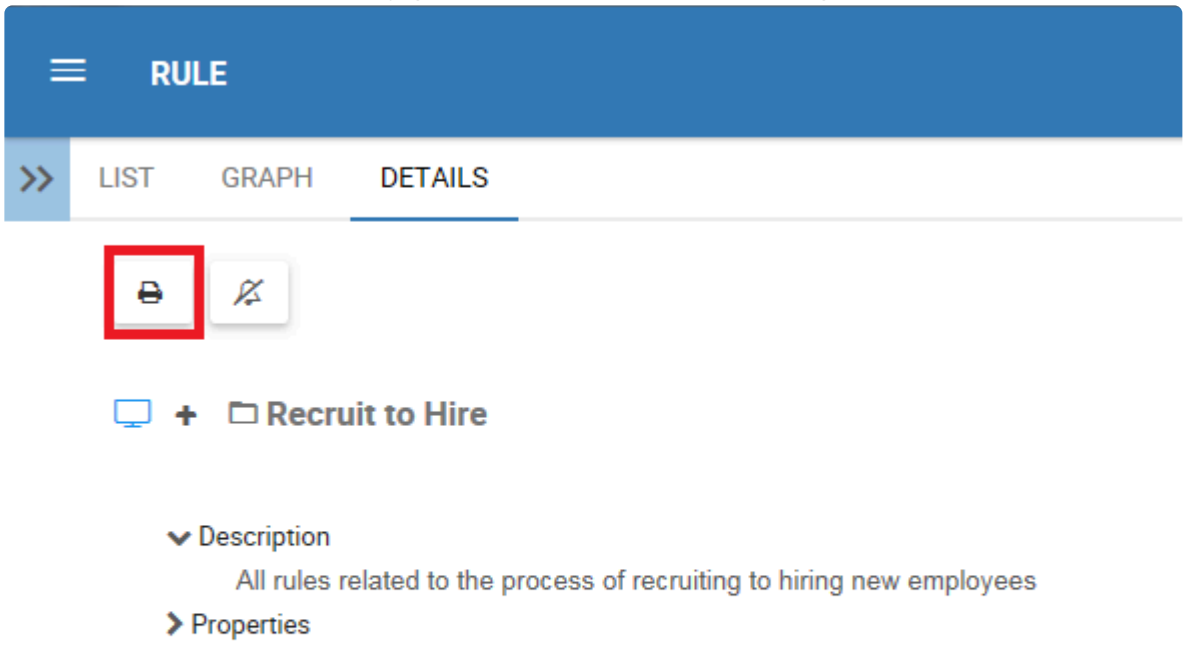
4.10.4.1.1 Toolbar

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
Favourite		Allows users to sort by favorites in the “My Actions” widget
Share		Copies URL to user’s clipboard to share
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.



4.10.4.1.1.4 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 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.

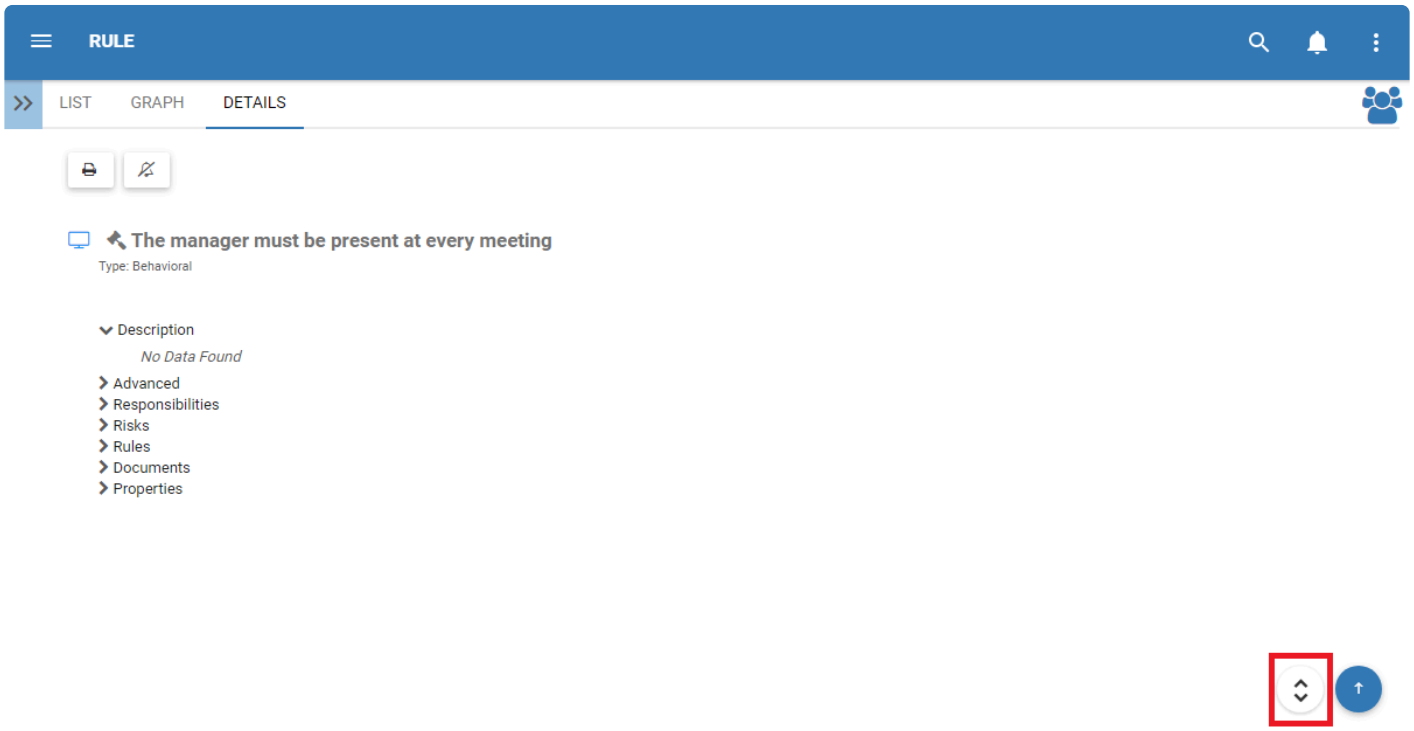
Rule Details display the following content

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

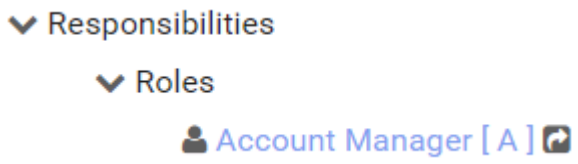
4.10.4.2.2 Advanced

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

To navigate directly to the object, click on the icon.

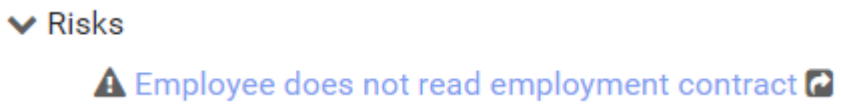


Users can click on the object's name to view its details in a popup. To go to the object's detail page, click on **Go To Object**

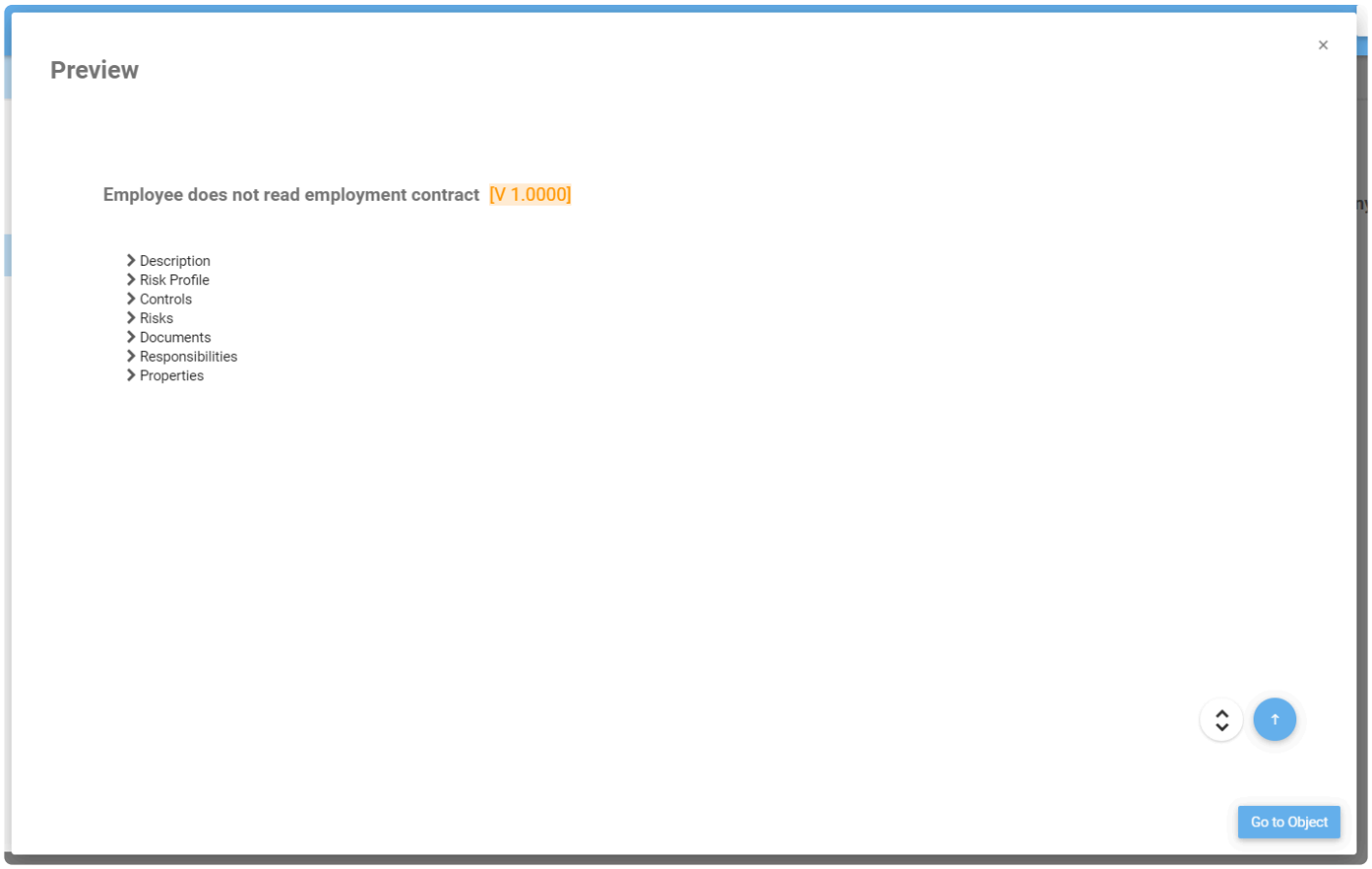
4.10.4.2.4 Risks

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

To navigate directly to the object, click on the icon.



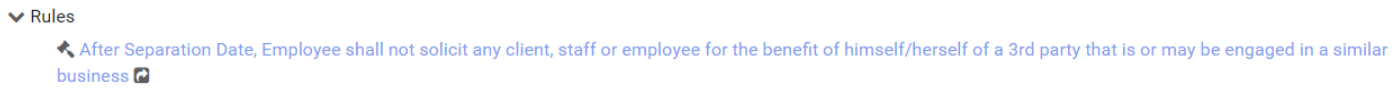
Users can click on the object's name to view its details in a popup. To navigate to the object's detail page, click on **Go To Object**



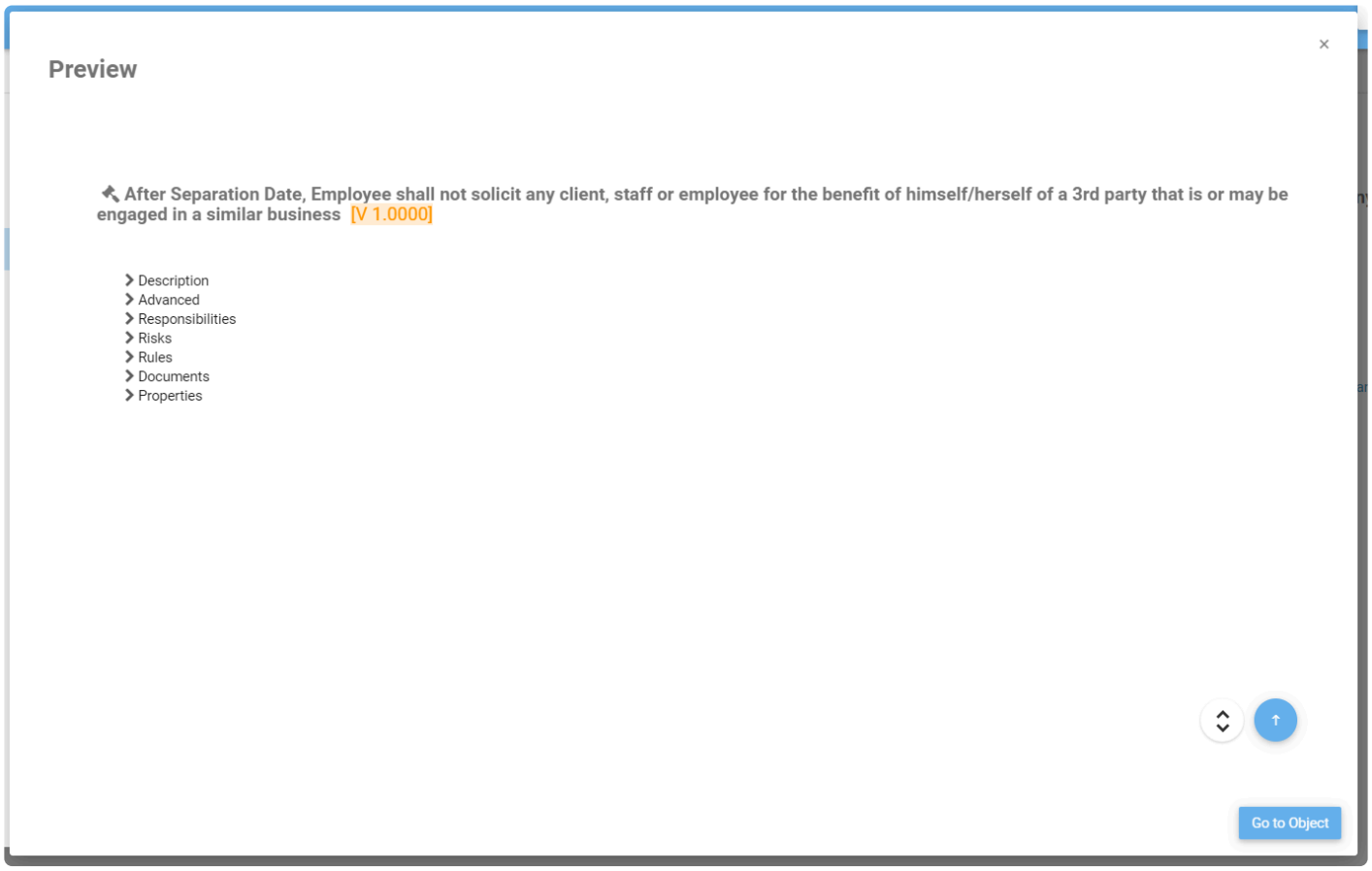
4.10.4.2.5 Rules

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

To navigate directly to the object, click on the icon.



Users can click on the object's name to view its details in a popup. To navigate to the object's detail page, click on **Go To Object**



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 at the ability to directly access these documents. Users are additionally provided details regarding the document type (docx, pptx, URL, xlsx, etc.)

To navigate directly to the object, click on the icon.

Users can also preview and download the document:

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 .

Users can click on the object's name to view its details in a popup. To navigate to the object's detail page, click on **Go To Object**

4.10.4.2.7 Properties

The properties section provides users with additional key information about items. The properties section is broken down into 3 categories:

1.**Current Version**: Provides information about what version is being viewed, and when the latest modification has been made
2.**Version History**: Provides information on previous versions of the rule. Includes major and minor versions, status, author and date.
3.**Analysis**: Provides information that better allows users to analyze items and related key details.

Current Version

Version Number: 0.0007

Last Modified: a month ago

Version History

Version Number	Status	Author	Date
0.0007	In Progress	Dia Apostolakis (Dia)	February 13, 2019 2:31 PM
0.0006	In Progress	Dia Apostolakis (Dia)	February 13, 2019 2:30 PM
0.0005	In Progress	scott Armstrong (Scott)	December 14, 2018 12:25 PM
0.0004	In Progress	scott Armstrong (Scott)	December 14, 2018 12:25 PM
0.0003	In Progress	scott Armstrong (Scott)	December 14, 2018 12:25 PM
0.0002	In Progress	scott Armstrong (Scott)	December 14, 2018 12:24 PM
0.0001	In Progress	scott Armstrong (Scott)	December 13, 2018 8:47 AM

Analysis

FREQUENCY	Yearly

4.10.4.2.8 Impacts

Users are able to view the impacts an object has on others in a list form in the Details view of any object. It is a complement to the Impact Graph, and another way of visualizing impact data.

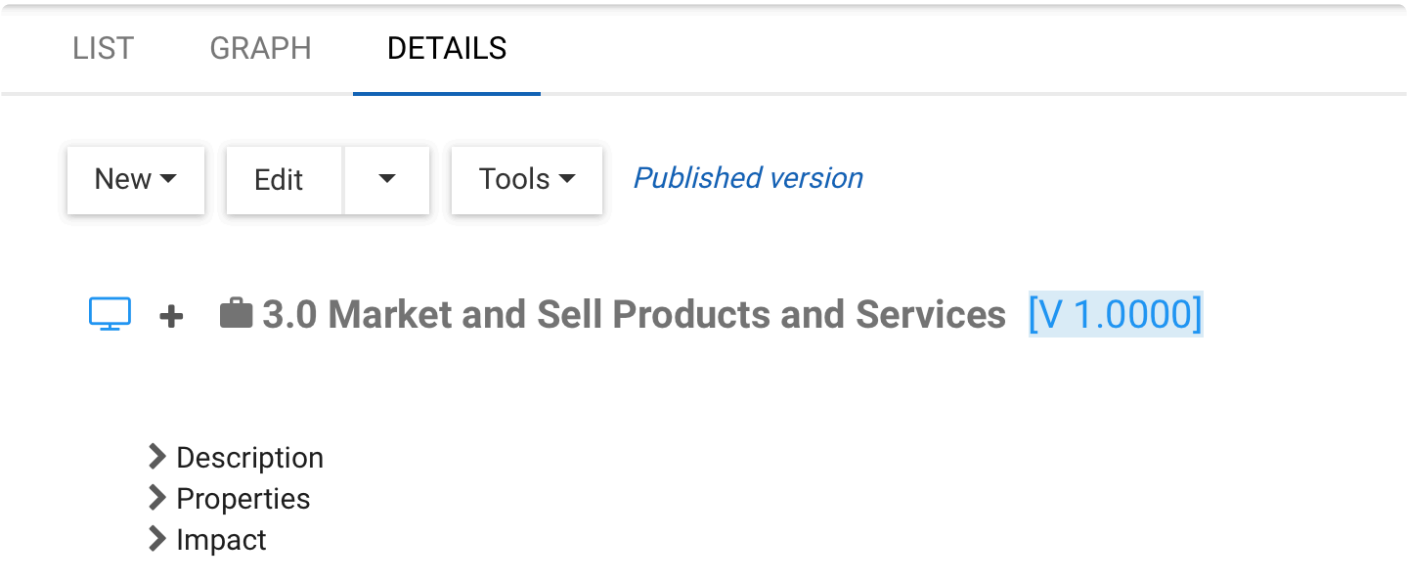
Visualizing the different associations within an organization allows users to better understand the complexity or certain business activities, as well as the true effect of changes to an object. Impacts can be used to educate business users, to analyze internal business processes and help management optimize activities effectively. Additionally, they help in the preparation of change management plans, allowing managers to map out the effect of any organizational change.

> The impact list will only show **direct** impacts, as opposed to the impact graph, which can be expanded to show **indirect** impacts on an object

Navigating to the Impact List

1. Navigate to any Detail page of any object in EPC

2. At the bottom of the Details page, click on Impact to expand the section



3. All direct impacts associated to the EPC Object will be listed.

> To sort a column by alphabetical order, click on it's header. The arrow pointing up indicates sorting in **Ascending Order**, the arrow pointing down indicates sorting in **Descending Order**, and no arrow indicates **No Sorting**.

Object Name A	Parent B	Object Type C	Assignment Type D	Justification E	Impact Type F	Status G
[Default Template] Analysis (A4 - Lands...	Default template folder	Document	Directly Impacts		Association	Published
Document should be reviewed every yea...	Import Folder	Rule	Directly Impacts		Association	Published
Enforce a zero-tolerance policy for dang...	Import Folder	Control	Directly Impacts		Association	Published
Onboarding cost	Imported Objective	KPI	Directly Impacts		Association	Published
Ratio of candidates to hires	Imported Objective	KPI	Directly Impacts		Association	Published
Risk B - with risk analysis!	Import Folder	Risk	Directly Impacts		Association	Published
Warehouse	Imported Measure Set	Objective	Directly Impacts		Association	Published

A	Object Name	The Name of the object. Click on the hyperlink to go to the object
B	Parent	The Parent of the object
C	Object Type	The type of the object
D	Assignment Type	The relationship type between the two objects
E	Justification	The justification of the object
F	Impact Type	How does this object impact the current object
G	Status	The status of the object (In Progress or Published)

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 Attributeson 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.

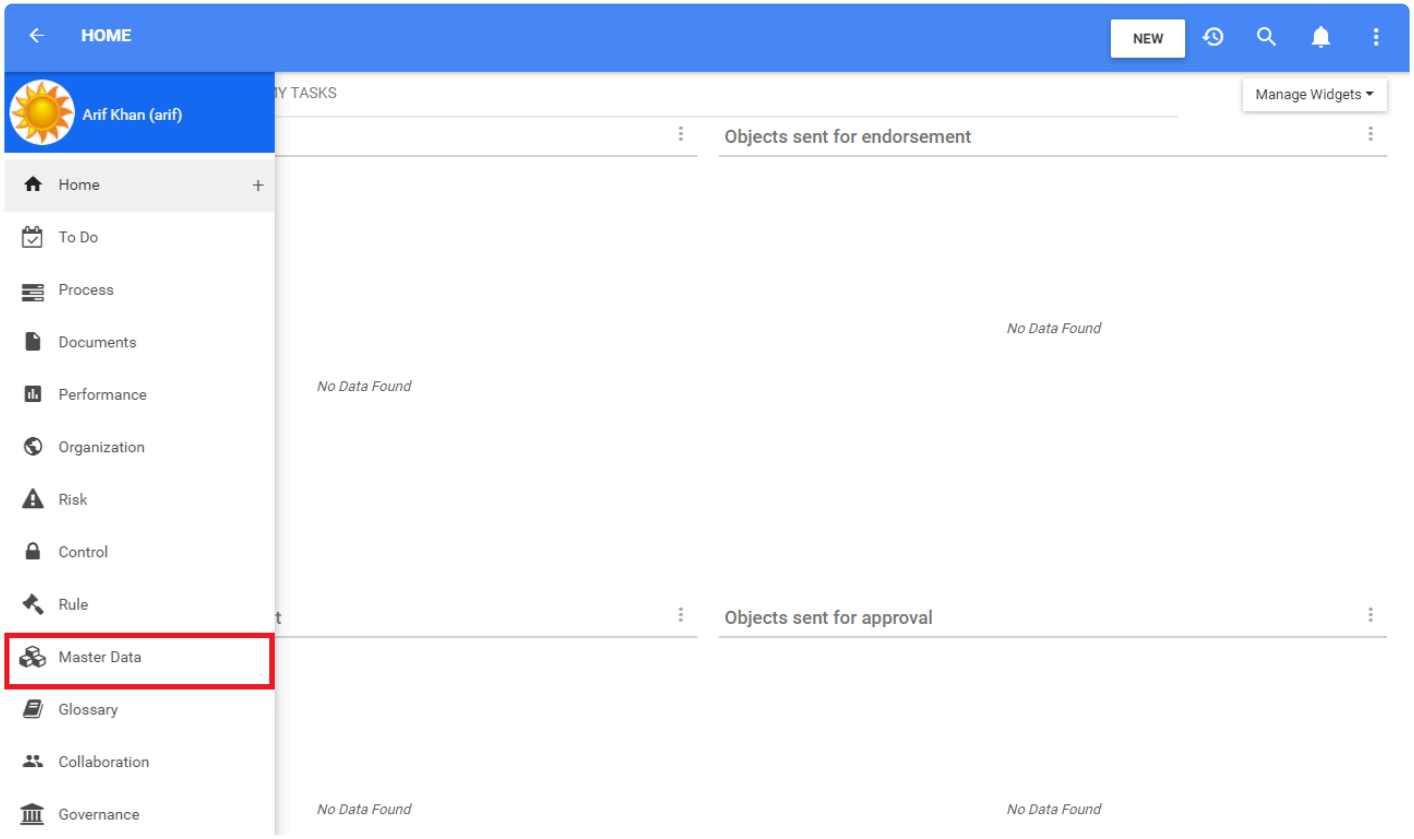
Dimension	Details
1. List	Provides view of all risk sets you have access to
2. Graph	Provides the visual representation of the risk set, their features and links (Impact and Hierarchy Graphs)
3. Details	Provides additional key information regarding specific risk details

How to access the Master Data module:

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

or

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. No hierarchy filter	A list view where **all** items within the given module are listed
2. Current level & below	A list view where **all levels below** the selected item are listed
3. Current level	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
Rule	Whether or not there are Rules directly associated with the item in question
Documents	Whether or not there are Documents directly associated with the item in question
Type	The type of the object
Subtype	Whether or not the item in question is associated to a Subtype
Categories	Whether or not there are Categories directly associated with the item in question
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
Identifier	Textual search for any existing unique identifier of an object
Permission	Whether or not there are roles that have permission associated with 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
Last Modified By	The name of the last resource that modified the object
Status	View the status of the item in question when Show Latest mode is on

© 2020 Interfacing Technologies Corporation

Locked	Whether the item in question is currently locked or not

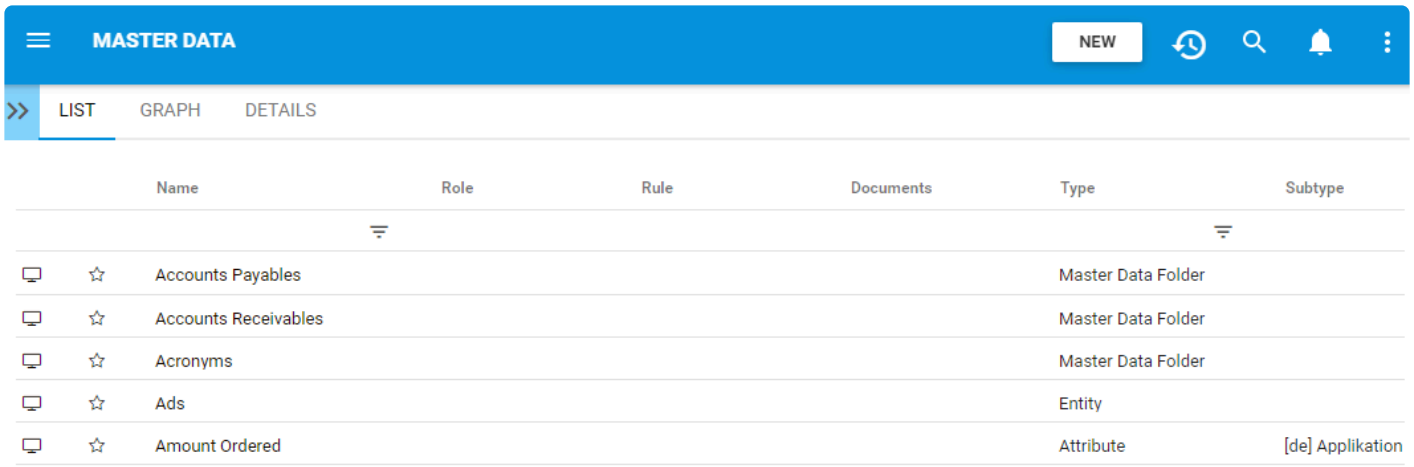
The selected list view will be saved both by web browser and by user.

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).

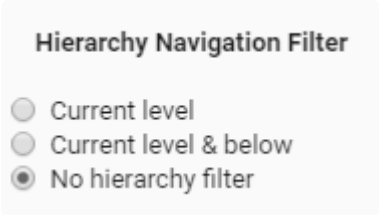


To simplify Master Data viewing; users **are not** greeted with all major Master Data items that they are associated too. Users are greeted with the list of Master Data Sets, the highest level of Master Data Classification in the EPC. However users can display these Master Data items within the **List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

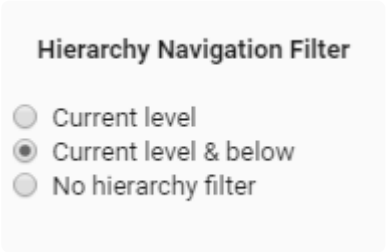
These steps are only required if a user is using an account or browser for the first time. As noted above, list preferences will be saved by user and browser to simplify navigation.

4. **(Optional)** To view further Master Data items, users must select the filter panel and then select “Current level & below of the EPC Web App.

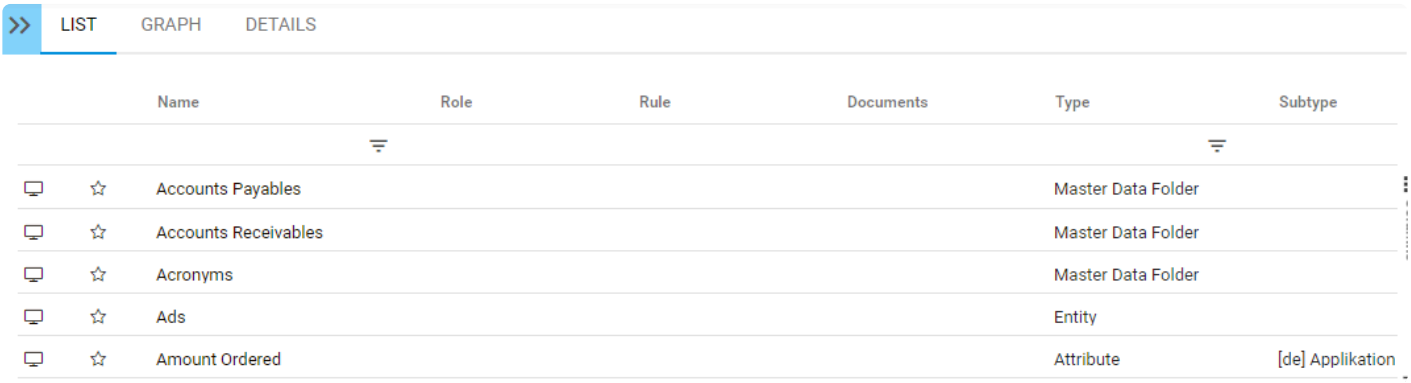
5. **(Optional)** Click on the filter setting and it will generate a list view



6. **(Optional)** Select “Current level & below”



7. **(Optional)** Upon selecting the “Current level & below”, the EPC will automatically refresh the page



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

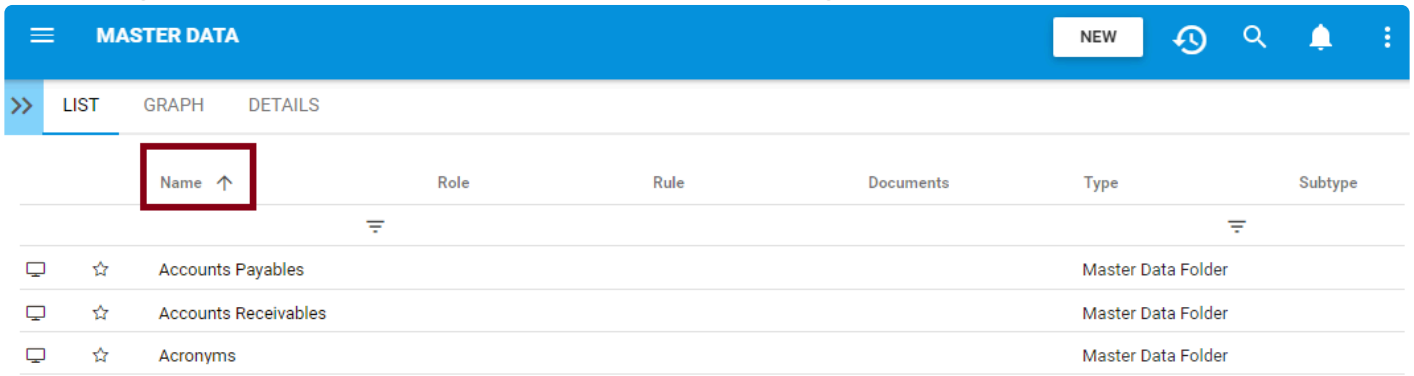
1. Navigate to the Master Data Module

2. Navigate Cursor to desired **Category**

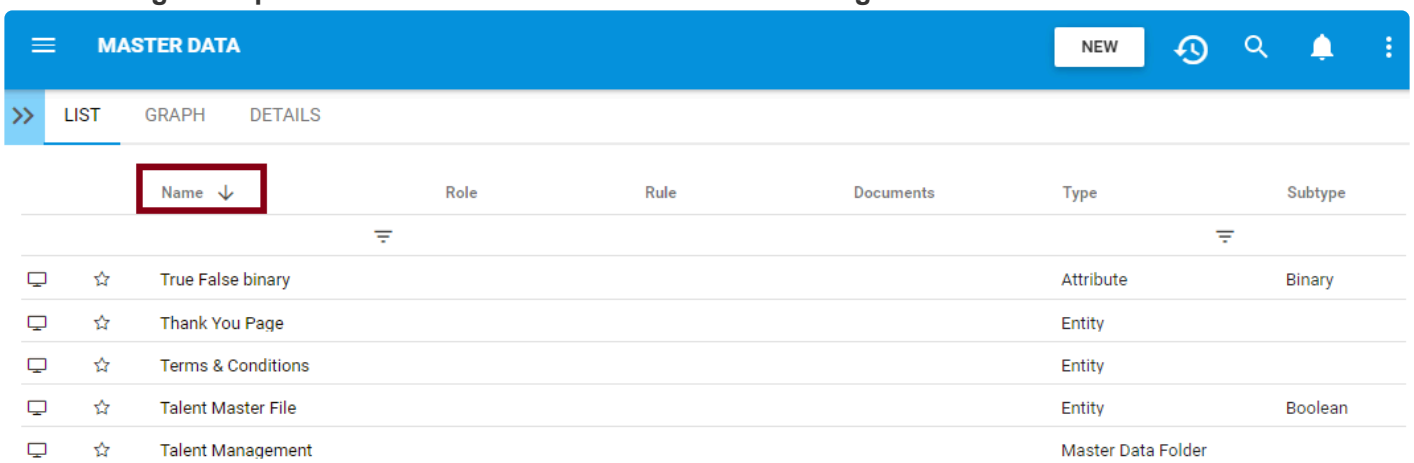
3. Click on the **Category**

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.



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



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
Role	Empty – The object has no associated roles Not-Empty – The object has at least one associated role
Rule	Empty – The object has no associated rule Not-Empty – The object has at least one associated rule
Documents	Empty – The object has no associated documents Not-Empty – The object has at least one associated document
Type	Master Data Set Master Data Folder Entity Attribute
Subtype	Subtypes created by admin
Categories	Empty – The object has no category associated Not-Empty – The object has at least one associated category
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
Identifier	Empty – The object does not have a unique identifier Not-Empty – The object has a unique identifier
Permission	Empty – The object does not have a role which has permission Not-Empty – The object has at least a role that has permission on the object

© 2020 Interfacing Technologies Corporation

Modified Date	The specific dates that things have been modified by
Last Modified By	The name of the last resource that modified the object
Last Modify By	Textual search of last resource who last modified an object
Status	Shows the status of the item in question (published vs in-progress) Approved Rejected Sent for Review Under Revision Revised
Locked	False – The object isn't locked True – The object is locked

The Filtering section will cover the following:

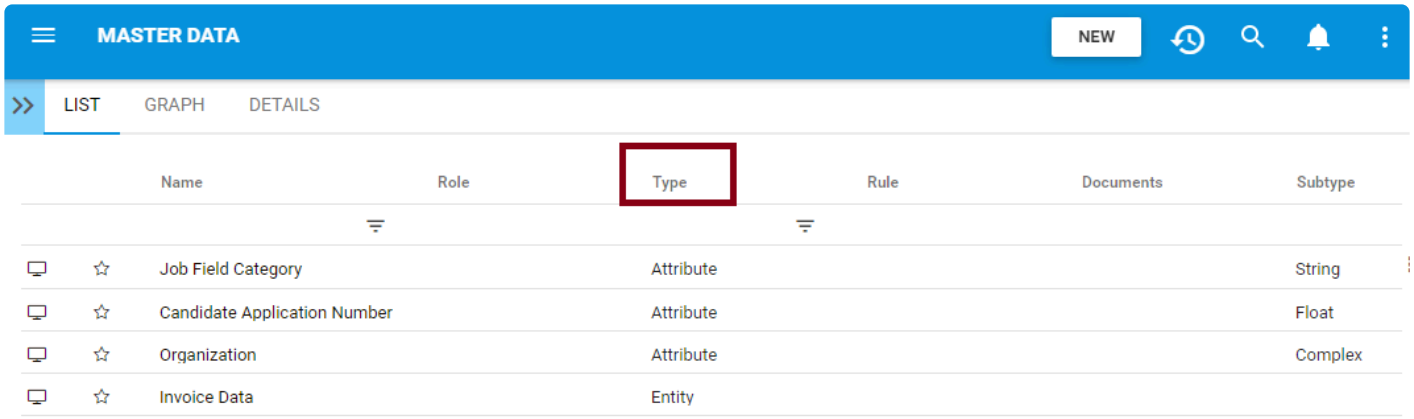
1. How to Add Filters
2. How to Remove Filters
3. How to Combine Filters

4.11.2.2.1 Add Filter

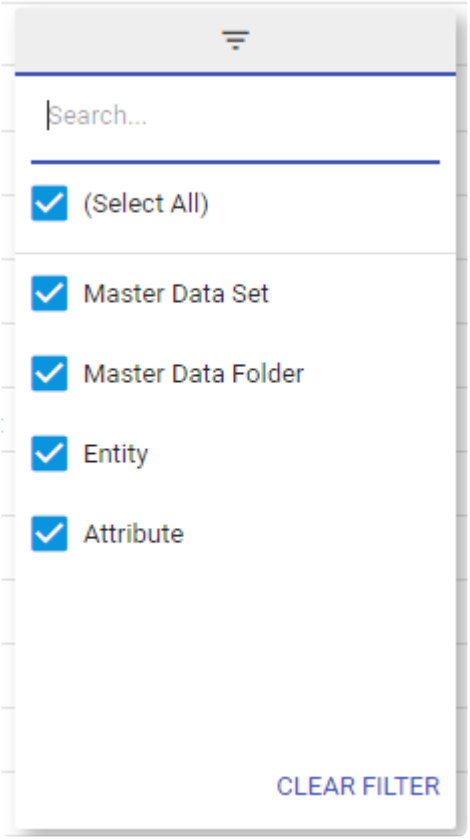
You can add filters to see the Master Data items and other specific items of your choice. **Type** what you are looking for, **select** the filter in the drop-down menu, or **define the range of dates.**

How to Add Filter

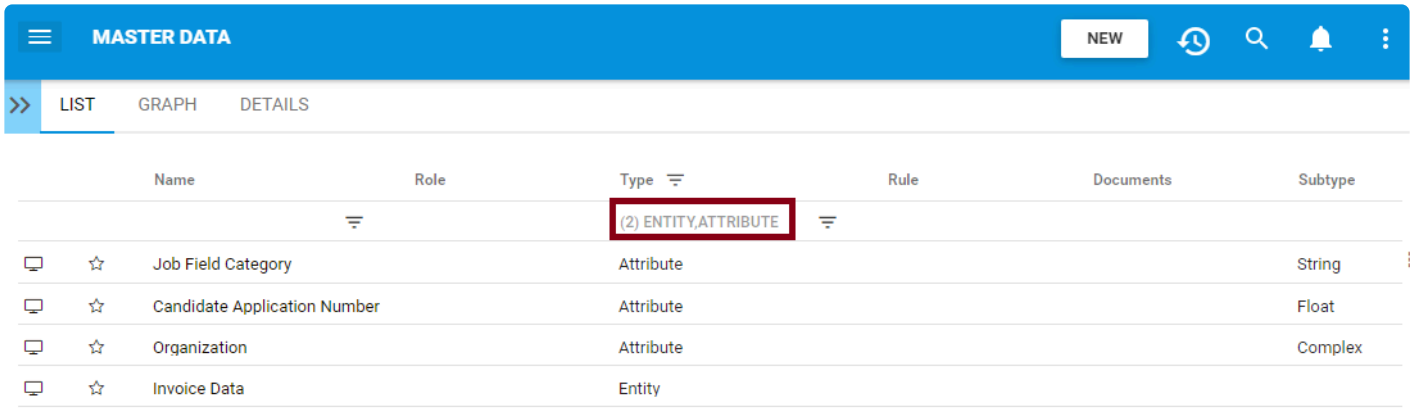
1. Navigate cursor and select the box column you wish to filter. For this example, we will use **Type.**



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



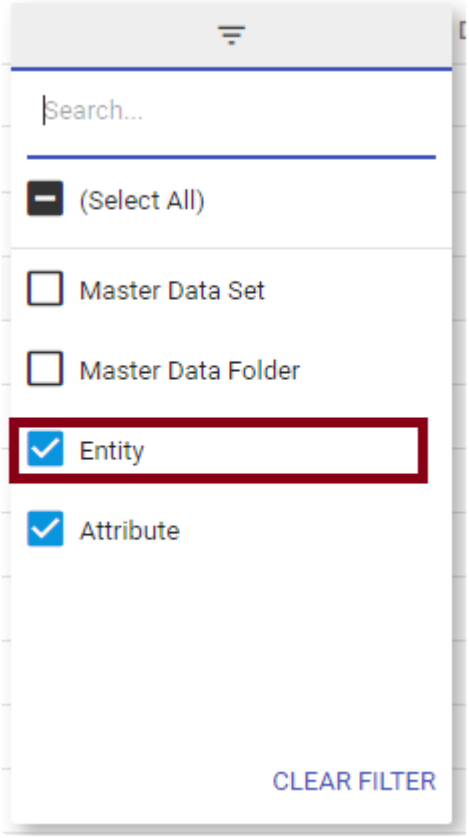
3. Select the desired filter. For this example, we will select **Attribute** and **Master Data Set.**


MASTER DATA
NEW
LIST
GRAPH
DETAILS
Name
Role
Type
Rule
Documents
Subtype
(2) ENTITY,ATTRIBUTE
Job Field Category
Attribute
String
Candidate Application Number
Attribute
Float
Organization
Attribute
Complex
Invoice Data
Entity

4.11.2.2.2 Remove Filter

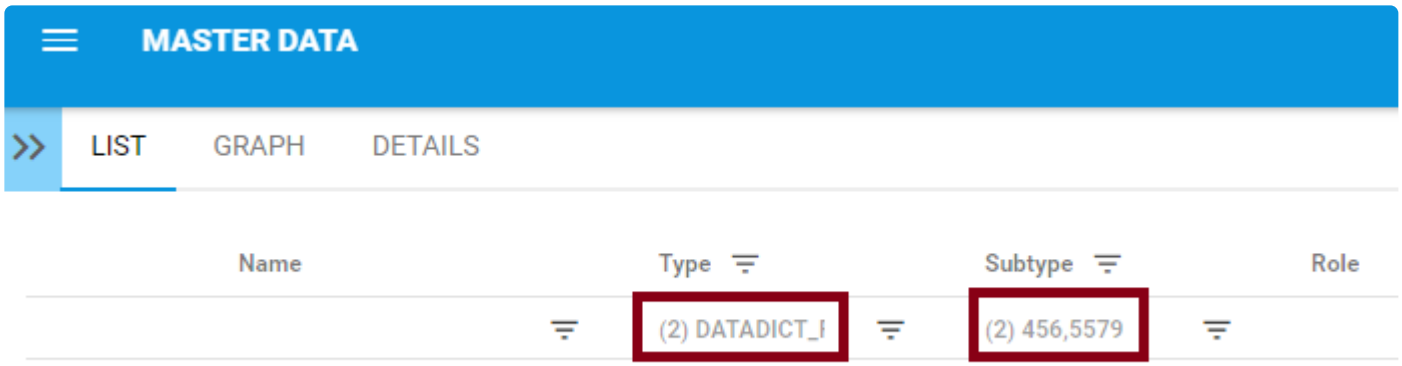
You can remove filters; this will naturally increase the results in your list.

Click on the button beside the filter name.



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**.



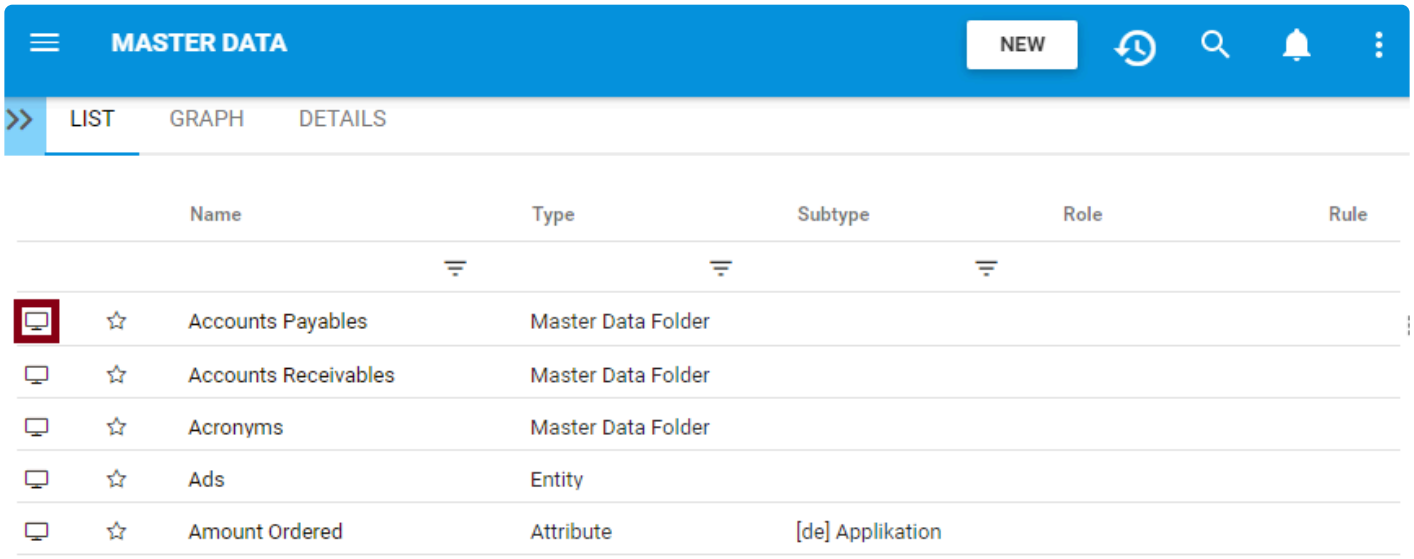
4.11.2.3 Quick Graph View

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".

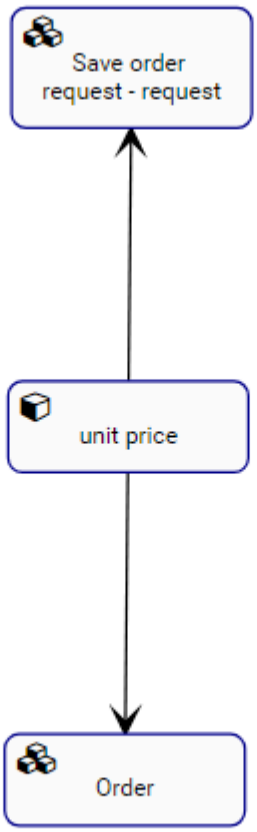
Please see the instructions below:

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.



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, Data Diagram)**

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.

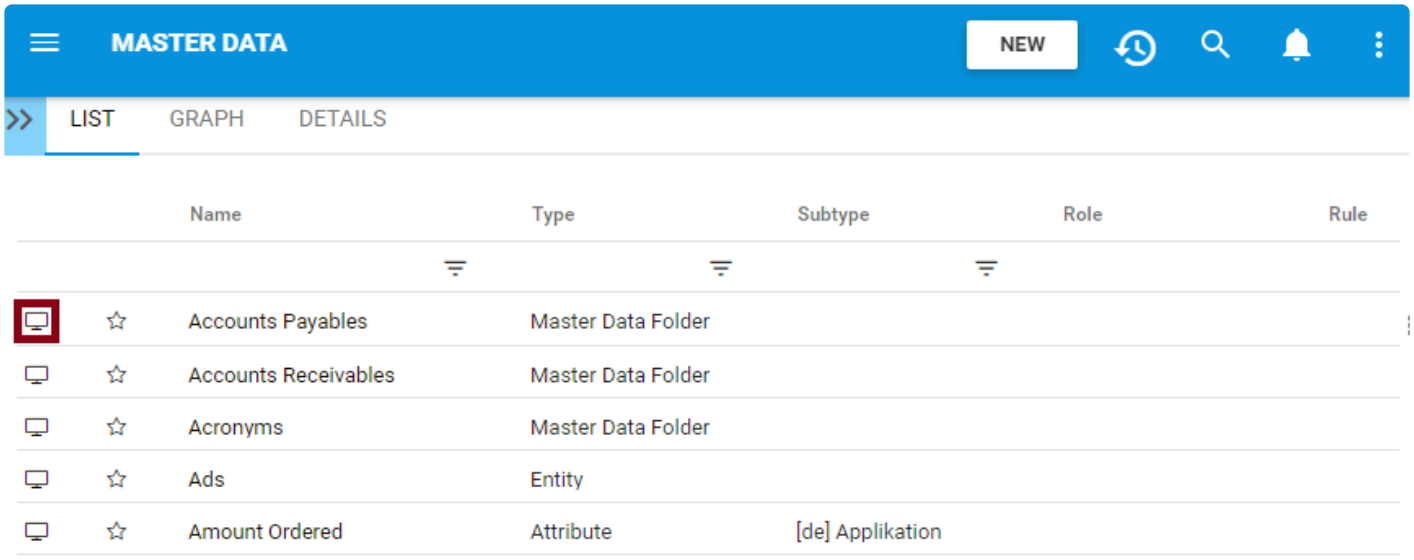
How to navigate to the Graph section (Manual Navigation)

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

2. Click on **Master Data**

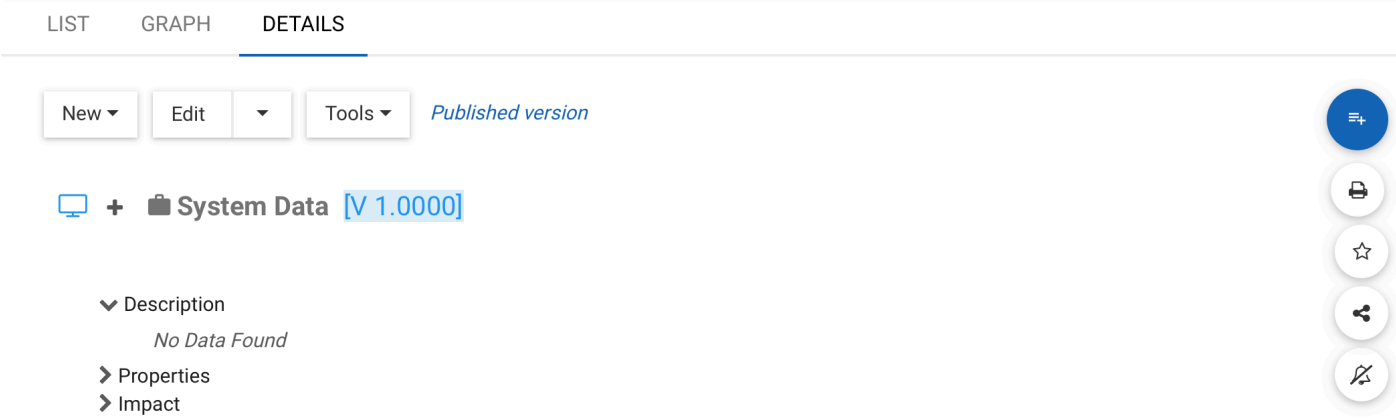
3. By default, you will be directed to **List View** in the Master Data module.

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

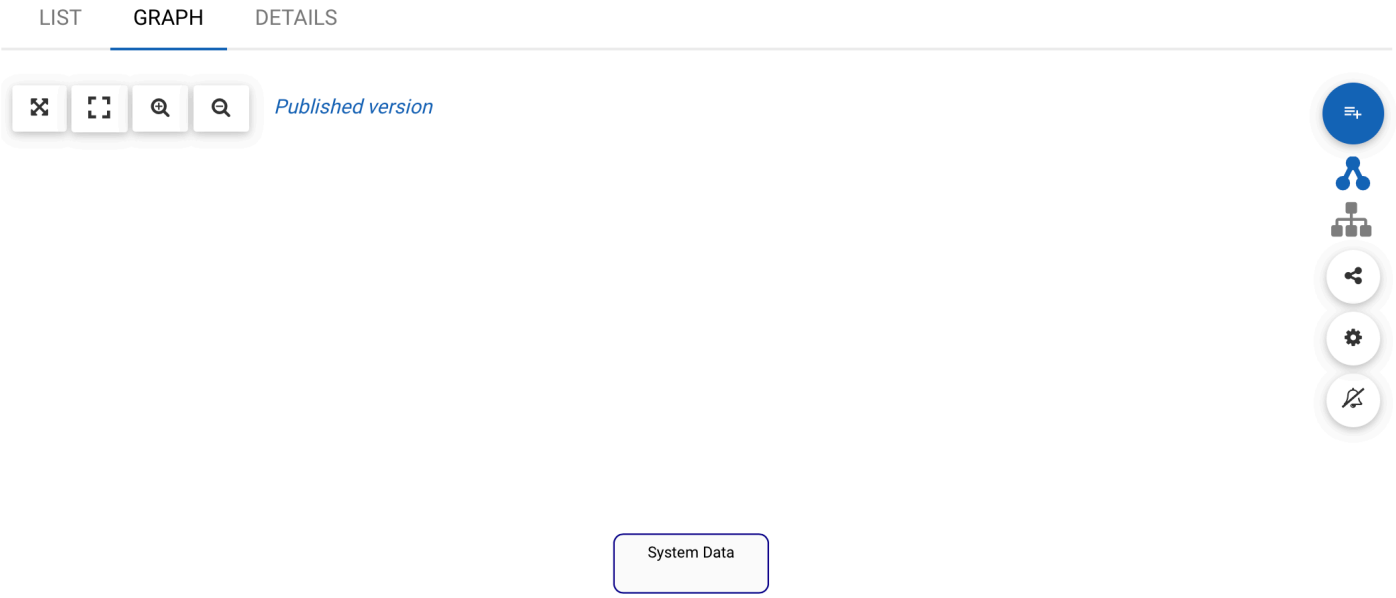


5. You will be prompted to the item’s details page

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

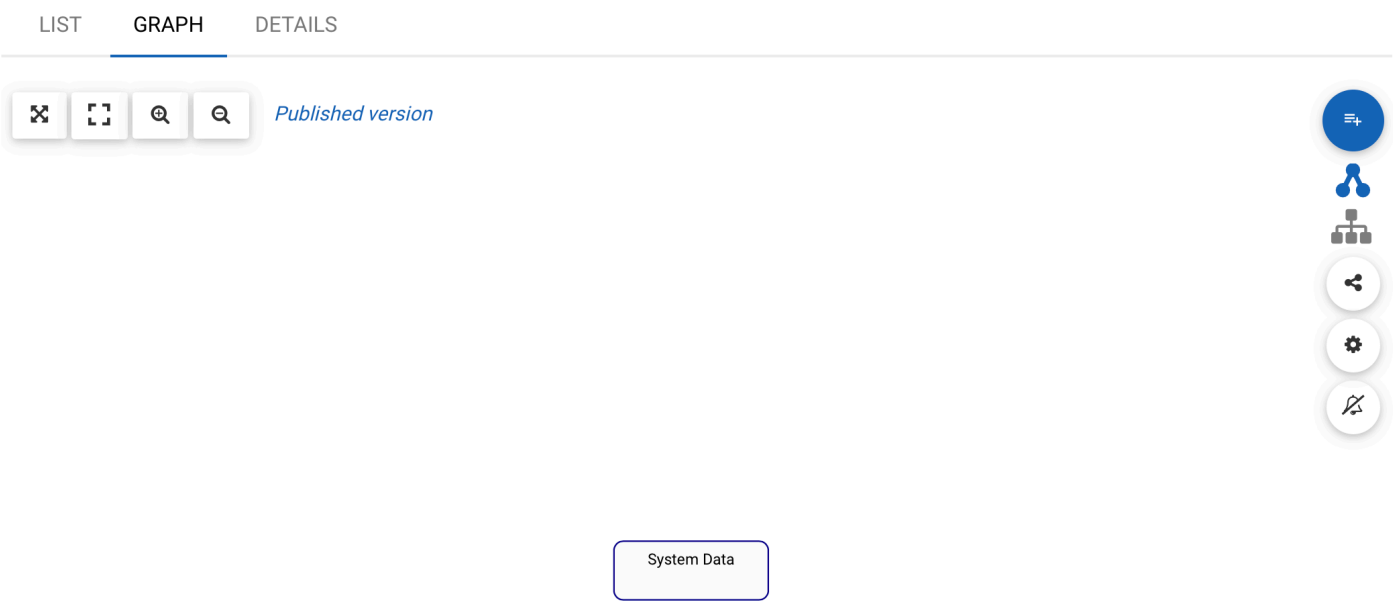


7. You will be navigated to the Graph section. By default, users will be sent to Impact view as the default Graph view. An example of this view can be seen below.



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

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
Share		Copies URL to user's clipboard to share
Settings		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.

4.11.3.1.1.1 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 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 for instructions.

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

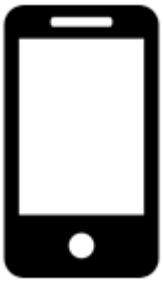
4.11.3.1.1.3 Zoom in

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.

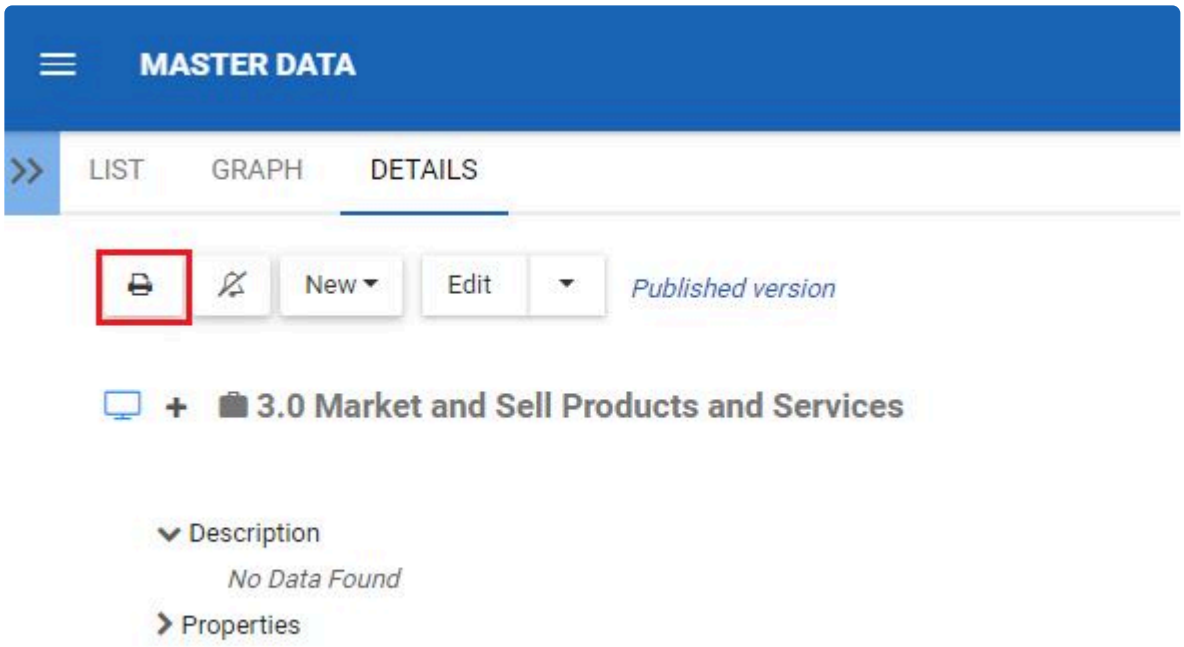
1. Navigate to a Master Data item within the Master Data Module
2. Click on the "Quick Graph View icon
3. Select the Zoom out button
4. Repeat step 3 until reaching the desired Zoom

> 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 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.



4.11.3.1.1.6 Settings

The Settings 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 settings button.

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

1. Select “Settings” icon

2. Navigate cursor to “Asset, Attribute”

3. The drop-down menu will be generated

4. Select the desired filter and “Save Changes”.

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.

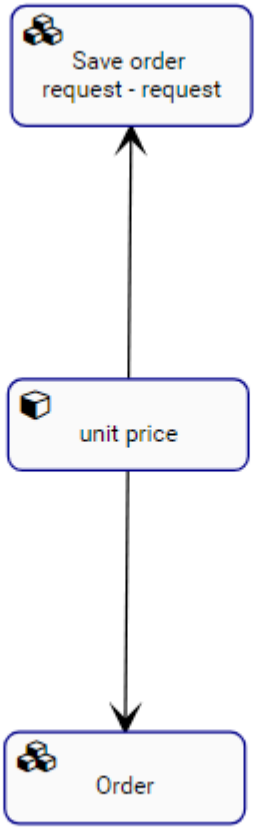
To use the Subscribe button, please see the following instructions.

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



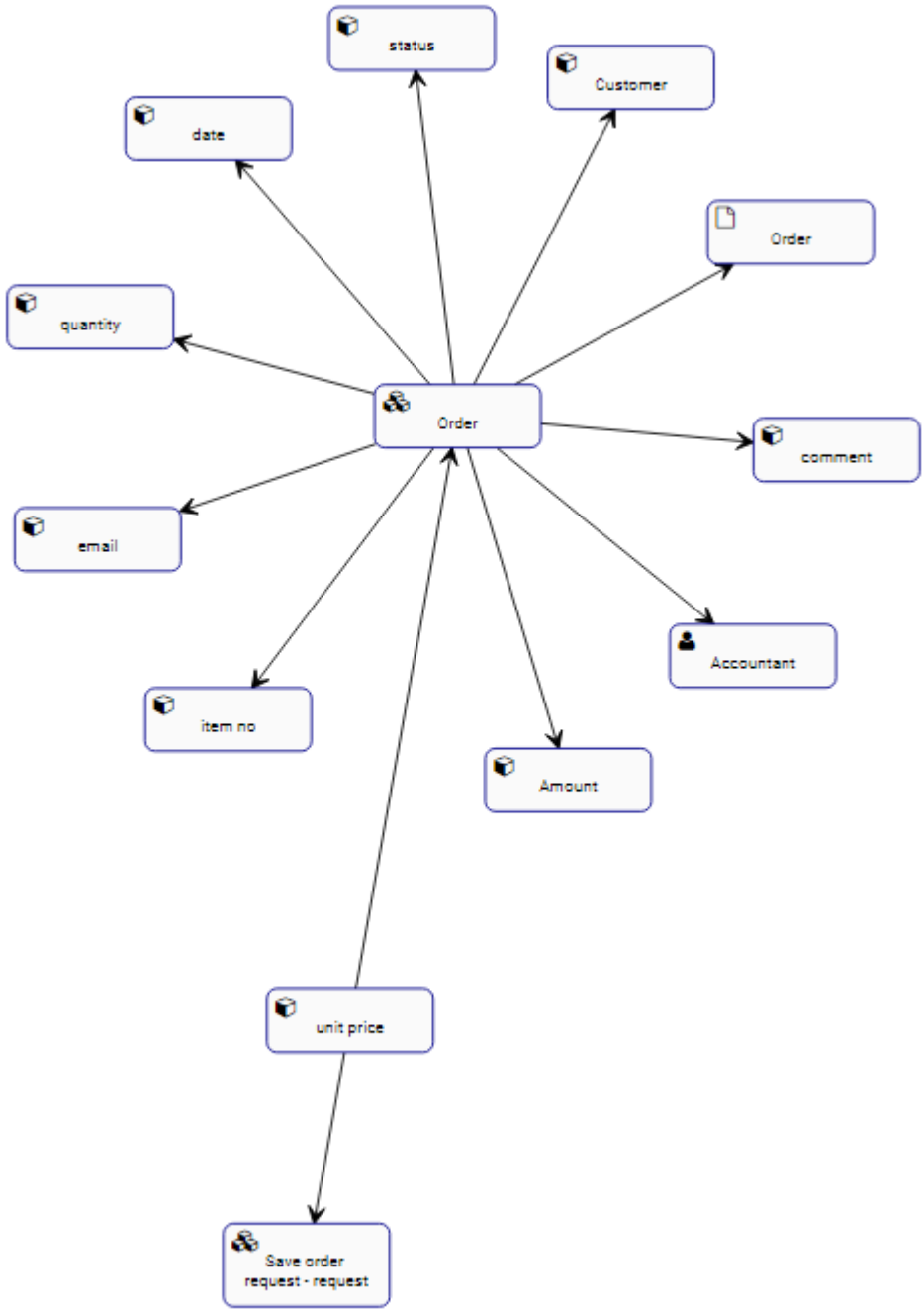
The example features the Impact Graph of the Attribute “Unit Price.” The Attribute is attached to two Entities “Order” and “Save order request – request”

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

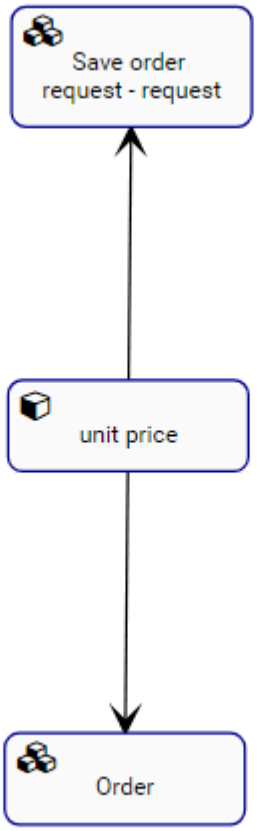
Impact Graph Navigation

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

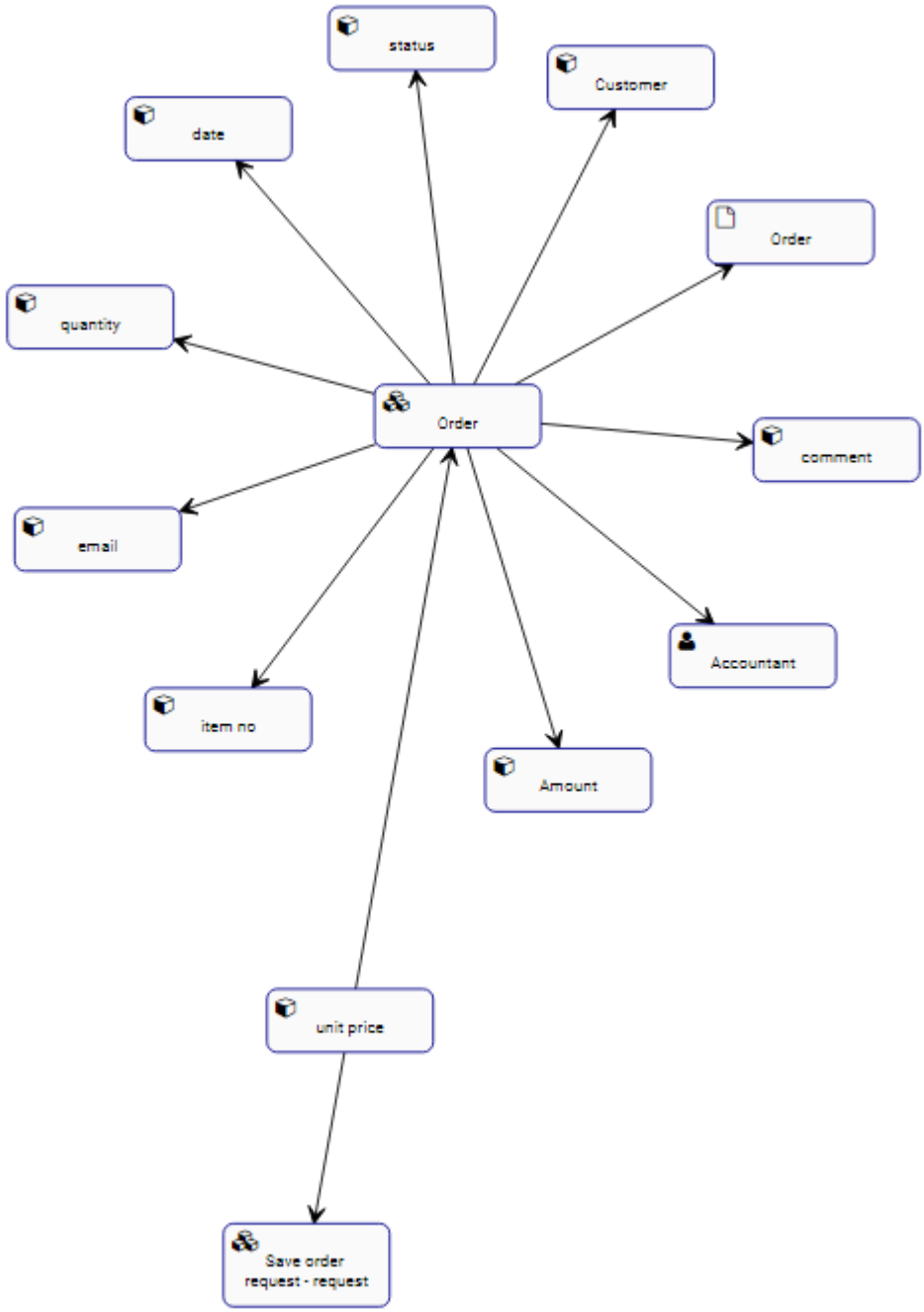
1. Navigate to an Attribute within the Master Data Module

2. Click on the Quick Graph View icon

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



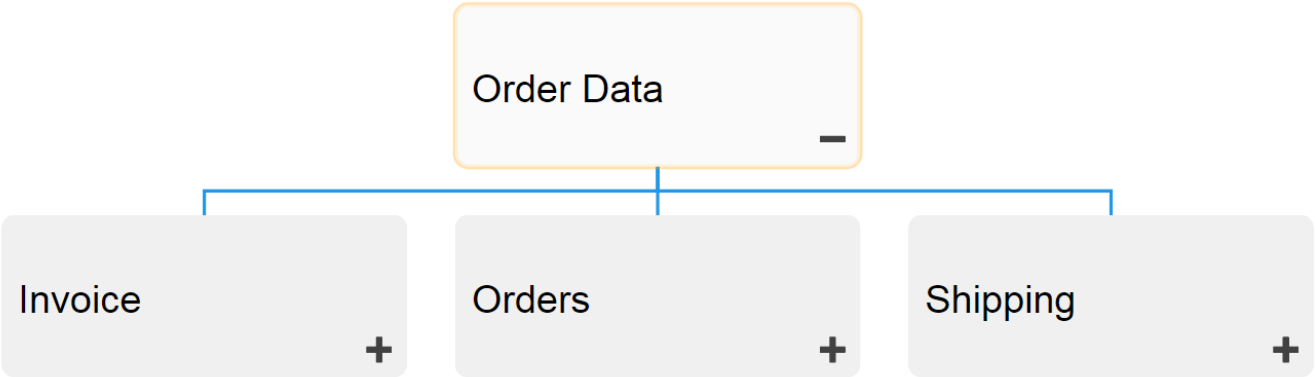
4. (Optional) To further expand the Impact Graph, simply double-click on the item to which you would like to display


status
Customer
date
Order
quantity
Order
comment
email
Accountant
item no
Amount
unit price
Save order request - request

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

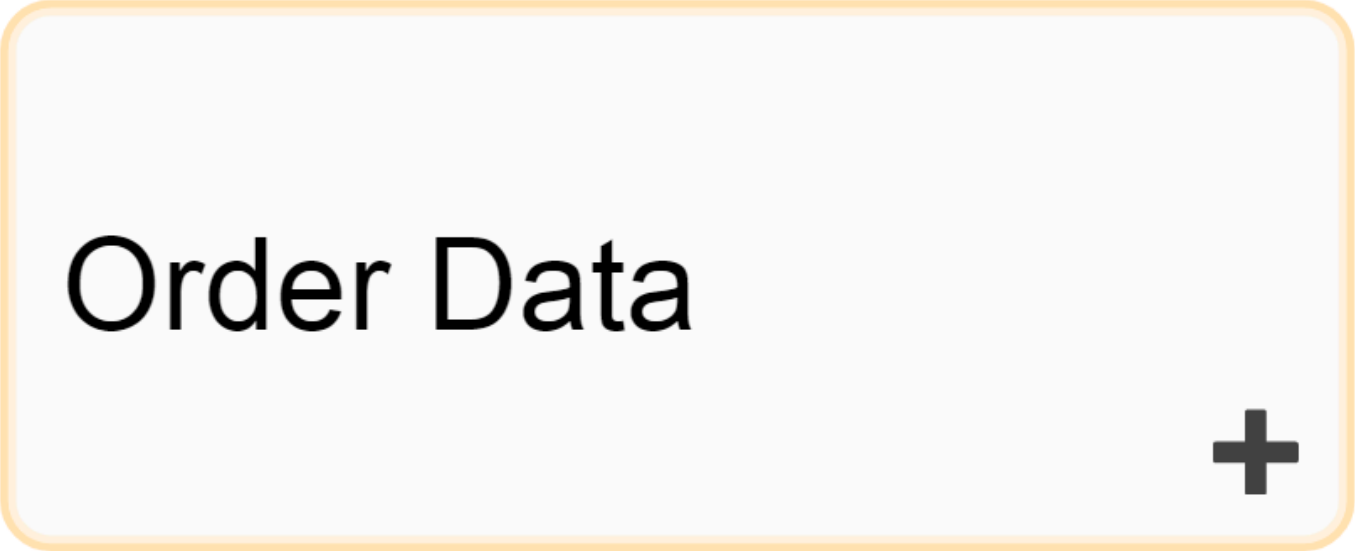
2. Select the item to which you would like to view.

> 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

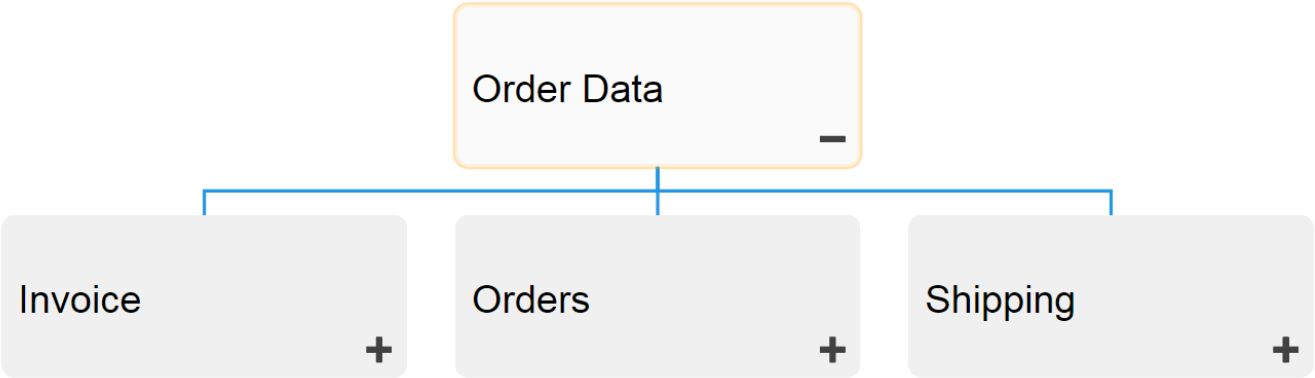
3. Select the Quick Graph View icon of the desired item

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.

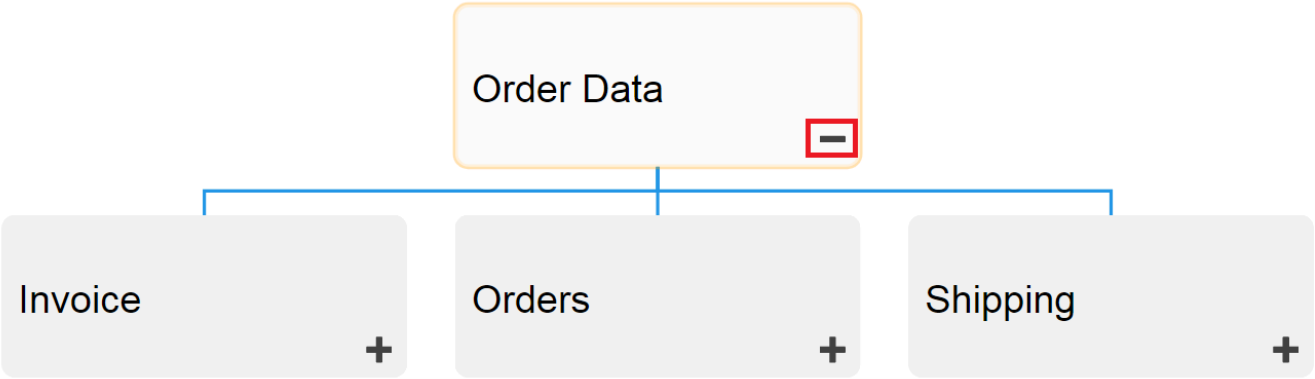


6. To further expand components of the Hierarchy Graph, double click on the on the objects in the Graph. This will expand the item selected.



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

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


Order Data
Invoice
Orders
Shipping

4.11.3.4 Data Diagram

EPC users can display their Master Data content in diagram format to help users understand the relationships between Entities and Attributes.

Defining entities and attributes can help an organization describe what is important to process in an area of business. Viewing this data in a diagram format allows the analyst to easily view the associations and dependencies between entities.

Data Diagram

To view the entity-relationship diagram, follow these steps:

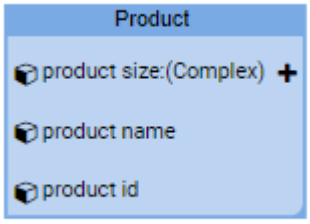
1. Navigate to the master data module

2. Select an entity you would like to view. Note that the ERD will only be available on an entity.

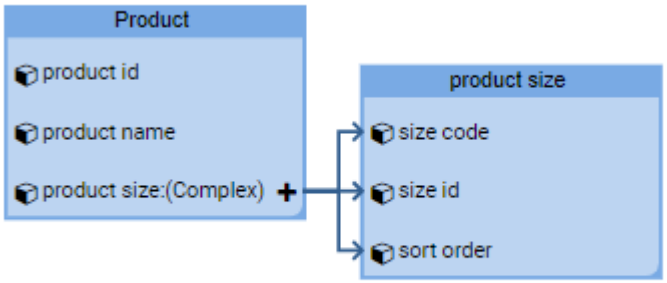
3. Select the Quick Graph View icon of the desired entity

4. Select the ERD icon

5. You will be navigated to the entity's ERD. The entire set will not be fully displayed upon initial navigation and will display the individual item selected.



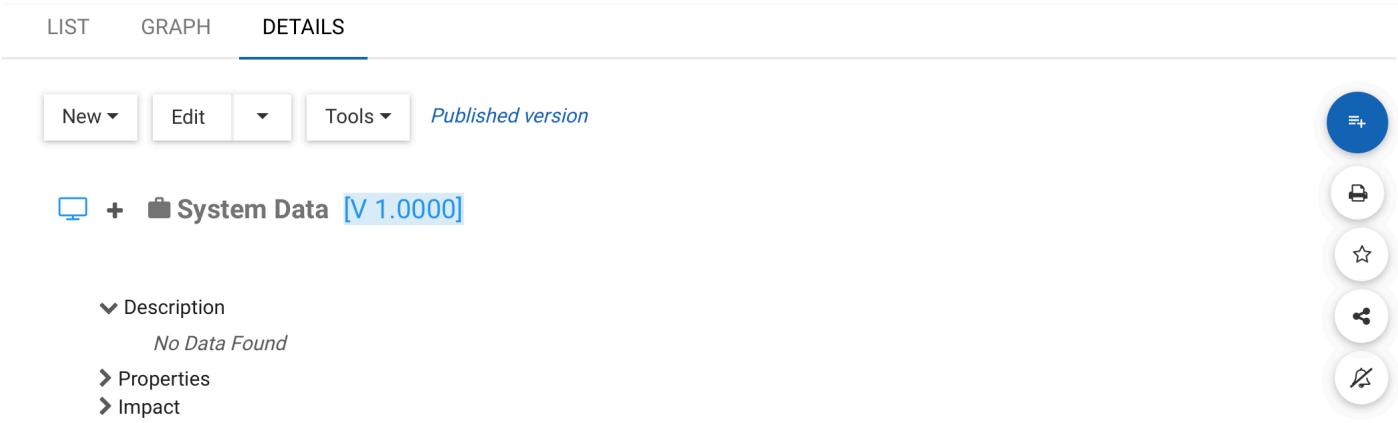
6. To further expand components of the ERD, double click on the "+" on the objects in the Graph. This will expand the ERD based on associated primary/foreign keys.


Product
product id
product name
product size:(Complex)
product size
size code
size id
sort order

4.11.4 Details

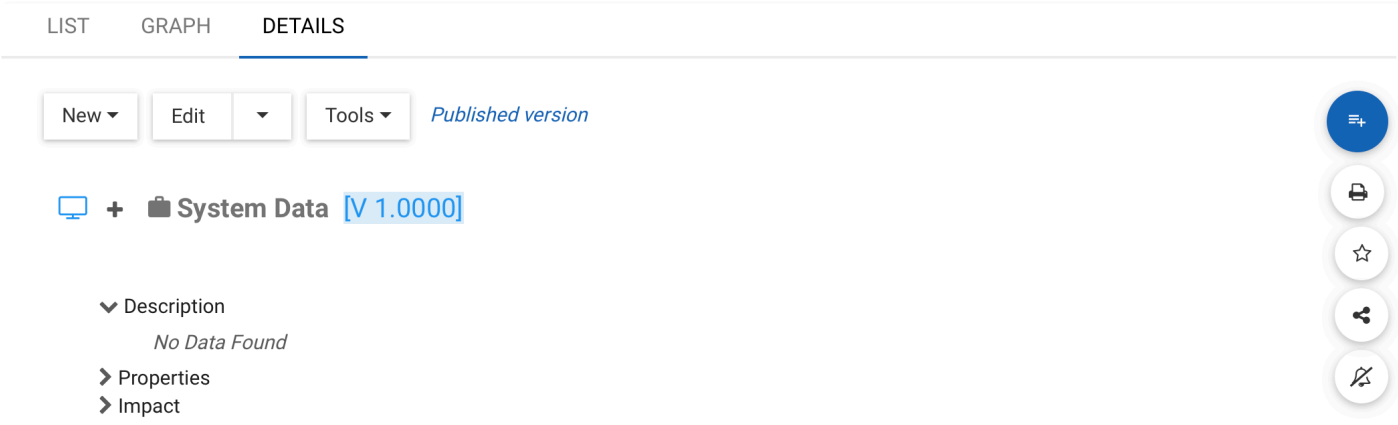
The Description section is where you will find details about the Master Data folders, Master Data Sets, Entities or Attributes you are observing. This rich text area allows for the display of all additional details that has been uploaded regarding the item in particular. These details provide users with 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.



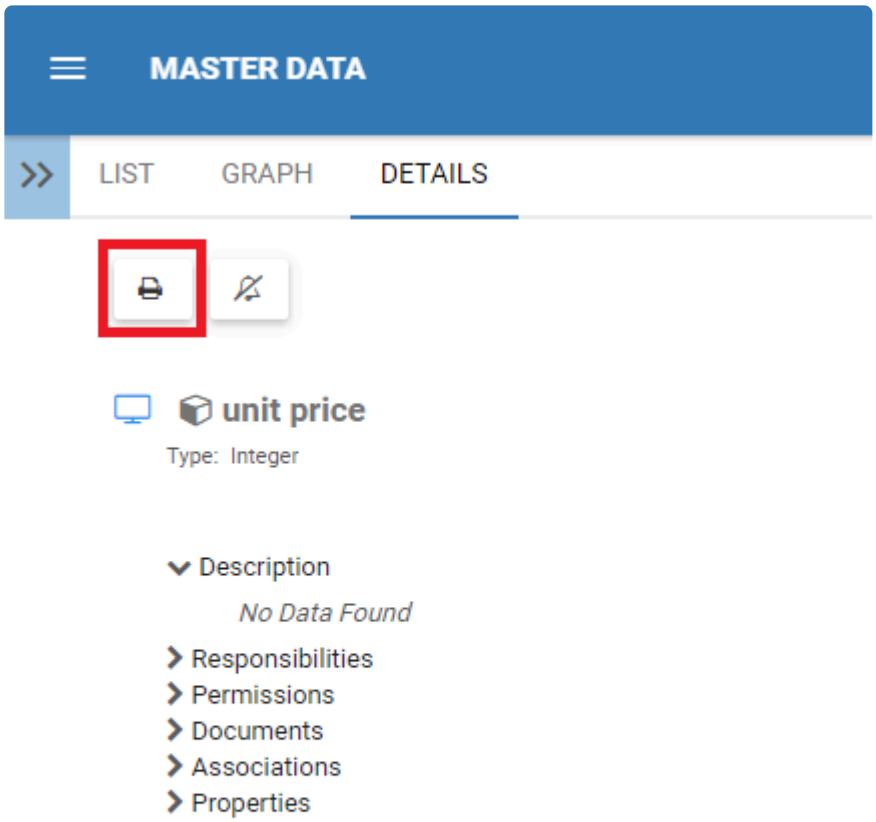
4.11.4.1.1 Toolbar

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
Favorite		Allows users to sort by favorites in the “My Actions” widget
Share		Copies URL to user’s clipboard to share
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.



4.11.4.1.1.4 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 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.

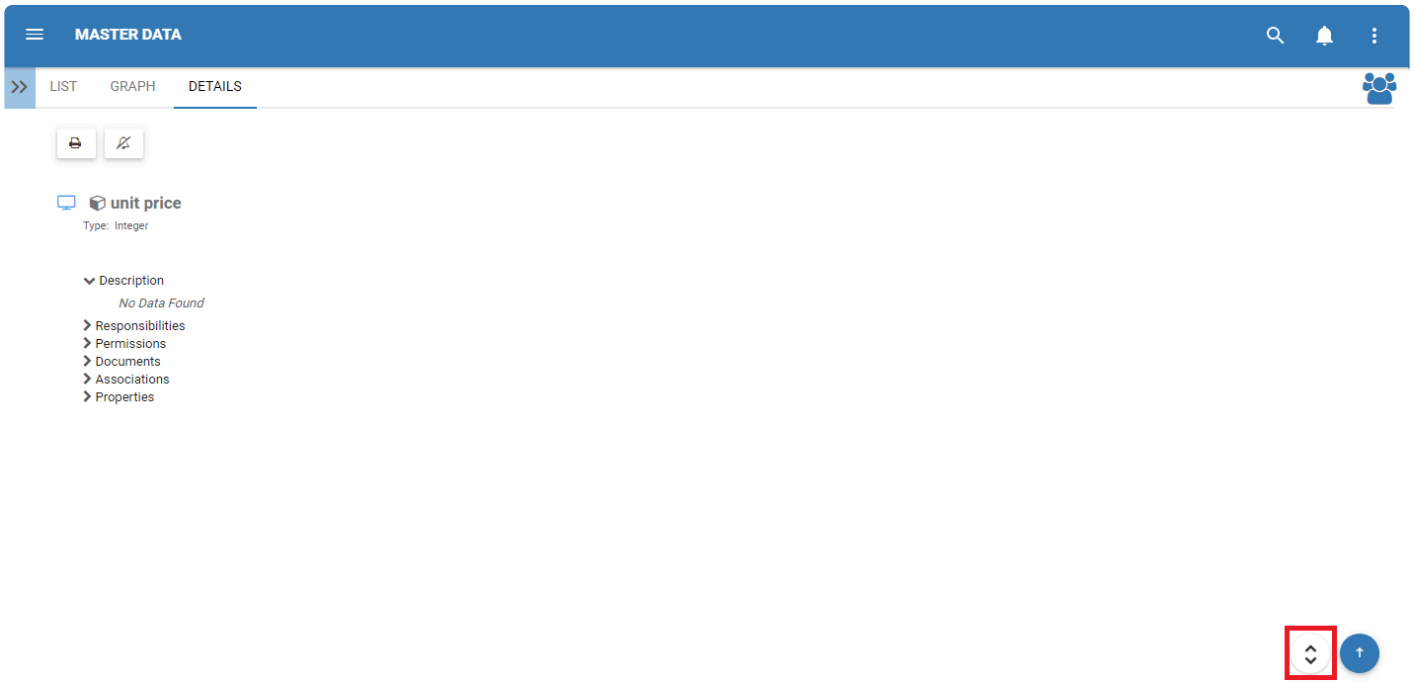
Master Data Details display the following content

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

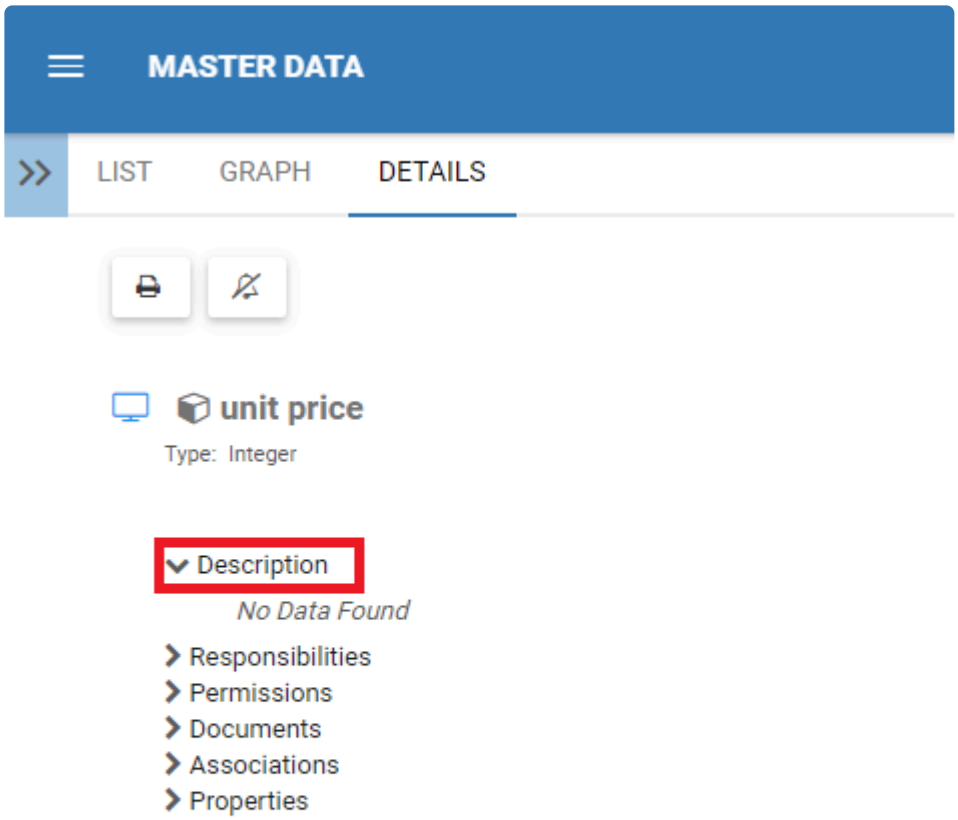


Selecting different items will result in different information being displayed. The above components specifically relate to the information that will be provided for items.

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

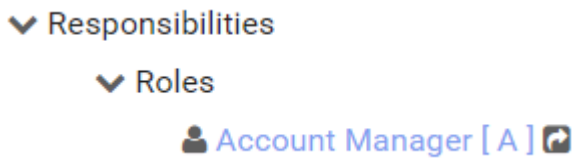
The description section provides users with all details relating to what an **Entity** or **Attribute** is, as well as particular information that can assist with execution. This information, populated by EPC Modelers, will provide further details for users to.



4.11.4.2.2 Responsibilities

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

To navigate directly to the object, click on the icon.

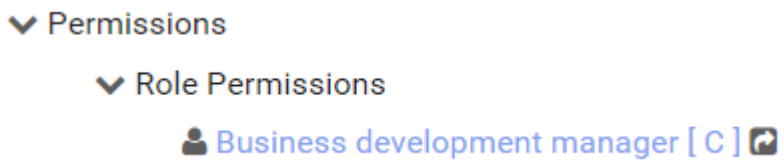


Users can click on the object's name to view its details in a popup. To go to the object's detail page, click on **Go To Object**

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.

To navigate directly to the object, click on the icon.



Users can click on the object's name to view its details in a popup. To navigate to the object's detail page, click on **Go To Object**

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 at the ability to directly access these documents. Users are additionally provided details regarding the document type (docx, pptx, URL, xlsx, etc.)

To navigate directly to the object, click on the icon.

Users can download or preview the document:

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

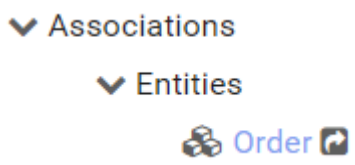
For further detail on previewing documents, please see section 4.7.4.1.1.2 .

Users can click on an object's name to view its details in a popup. To navigate to an object's detail page, click on **Go To Object**

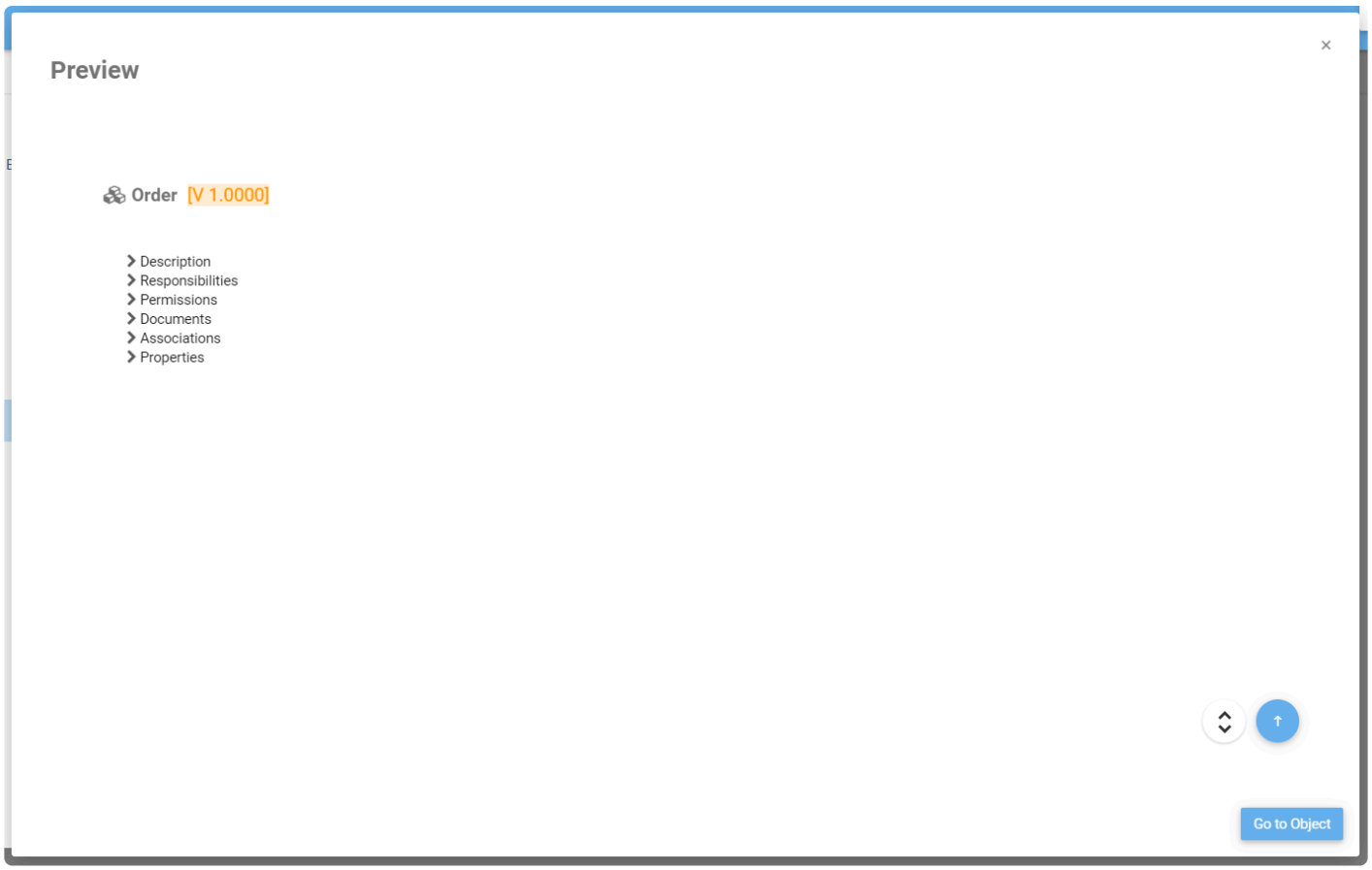
4.11.4.2.5 Associations

The Associations section displays Master Data items (Entities, in this example) and Rules associated to a specific Attribute.

To navigate directly to the object, click on the icon.



Users can click on an object's name to view its details in a popup. To navigate to the object's detail page, click on **Go To Object**



4.11.4.2.6 Properties

The properties section provides users with additional key information about items. The properties section is broken down into 3 categories:

1.**Current Version**: Provides information about what version is being viewed, and when the latest modification has been made
2.**Version History**: Provides information on previous versions of the Master Data object. Includes major and minor versions, status, author and date.
3.**Analysis**: Provides information that better allows users to analyze items and related key details.

Current Version

Version Number: 0.0007

Last Modified: a month ago

Version History

Version Number	Status	Author	Date
0.0007	In Progress	Dia Apostolakis (Dia)	February 13, 2019 2:31 PM
0.0006	In Progress	Dia Apostolakis (Dia)	February 13, 2019 2:30 PM
0.0005	In Progress	scott Armstrong (Scott)	December 14, 2018 12:25 PM
0.0004	In Progress	scott Armstrong (Scott)	December 14, 2018 12:25 PM
0.0003	In Progress	scott Armstrong (Scott)	December 14, 2018 12:25 PM
0.0002	In Progress	scott Armstrong (Scott)	December 14, 2018 12:24 PM
0.0001	In Progress	scott Armstrong (Scott)	December 13, 2018 8:47 AM

Analysis

FREQUENCY	Yearly

4.11.4.2.7 Impacts

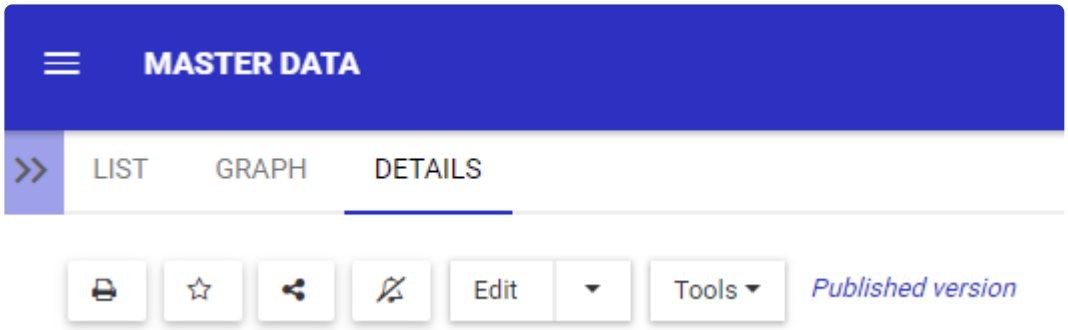
Users are able to view the impacts an object has on others in a list form in the Details view of any object. It is a complement to the Impact Graph, and another way of visualizing impact data.

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 to an object. Impacts 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.

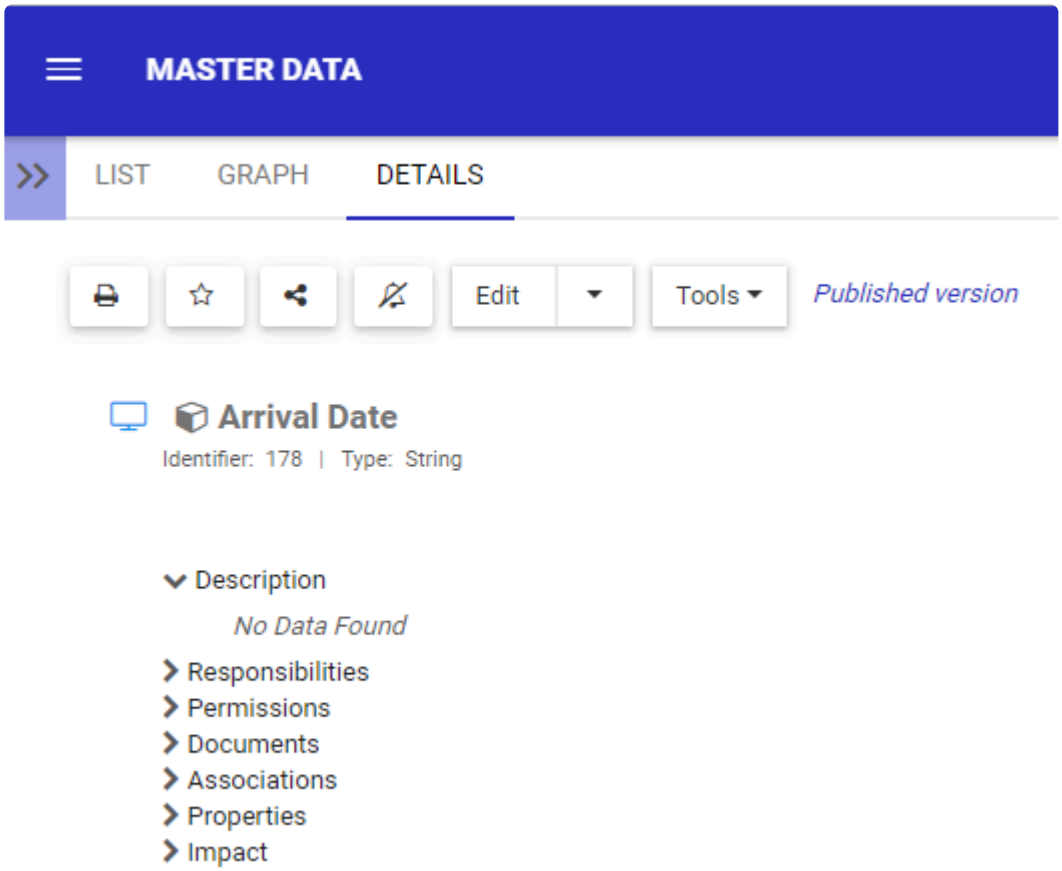
> The impact list will only show **direct** impacts, as opposed to the impact graph, which can be expanded to show **indirect** impacts on an object

Navigating to the Impact List

1. Navigate to any Detail page of any object in EPC



2. At the bottom of the Details page, click on Impact to expand the section



3. All direct impacts associated to the EPC Object will be listed.

> To sort a column by alphabetical order, click on it's header. The arrow pointing up indicates sorting in **Ascending Order**, the arrow pointing down indicates sorting in **Descending Order**, and no arrow indicates **No Sorting**.

Object Name A	Parent B	Object Type C	Assignment Type D	Justification E	Impact Type F	Status G
[Default Template] Analysis (A4 - Lands...	Default template folder	Document	Directly Impacts		Association	Published
Document should be reviewed every yea...	Import Folder	Rule	Directly Impacts		Association	Published
Enforce a zero-tolerance policy for dang...	Import Folder	Control	Directly Impacts		Association	Published
Onboarding cost	Imported Objective	KPI	Directly Impacts		Association	Published
Ratio of candidates to hires	Imported Objective	KPI	Directly Impacts		Association	Published
Risk B - with risk analysis!	Import Folder	Risk	Directly Impacts		Association	Published
Warehouse	Imported Measure Set	Objective	Directly Impacts		Association	Published

A	Object Name	The Name of the object. Click on the hyperlink to go to the object
B	Parent	The Parent of the object
C	Object Type	The type of the object
D	Assignment Type	The relationship type between the two objects

E	Justification	The justification of the object
F	Impact Type	How does this object impact the current object
G	Status	The status of the object (In Progress or Published)

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

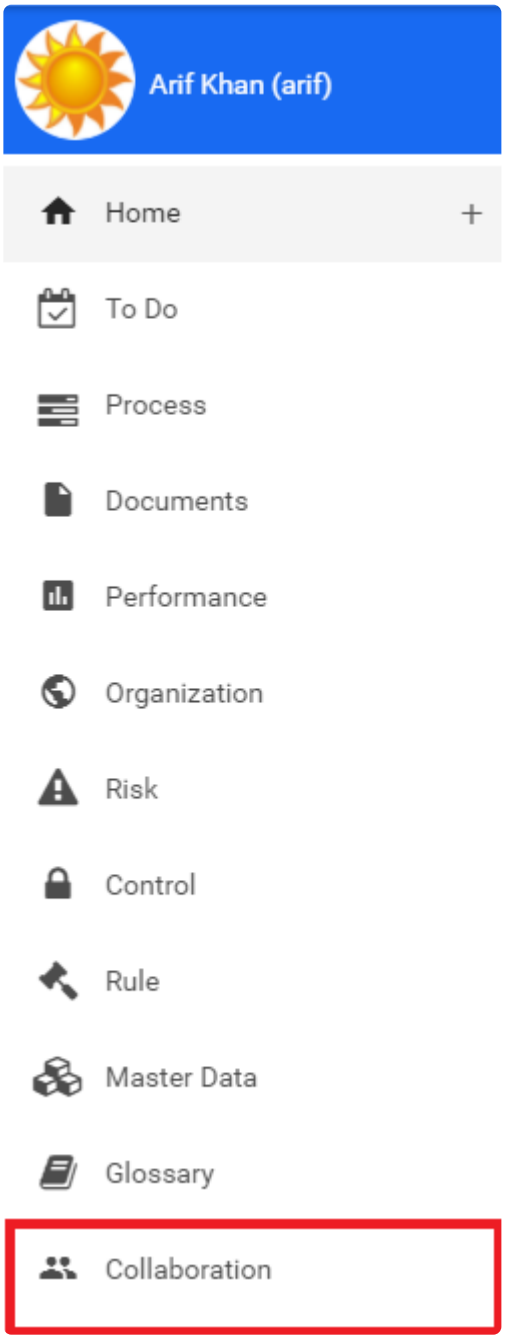
The Collaboration Module provides a listed format of all items that a user is engaged with. Engagement can mean they are currently discussing, questioning or reporting information on an item, but it also involves items that users are linked to (Using RASCI-VS matrix) that are currently undergoing such 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)
Initiator	Textual search for any existing name of the initiator of the object
Sequence #	Allows users to sort processes chronologically by associated sequence number
Parent	Whether or not there is a Parent included with the item in question
Categories	Whether or not there are Categories directly associated with the item in question
Due Date	The due date of the object in question
System ID	The system-id of the object in question
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

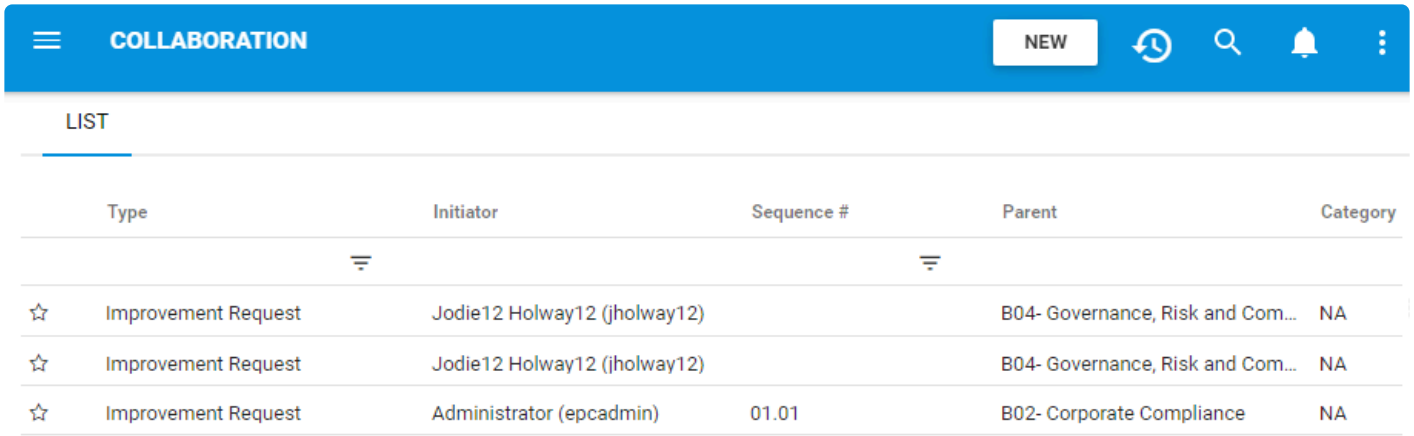
To navigate to the Collaboration Module, please see the steps below:

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
NEW
LIST
Type
Initiator
Sequence #
Parent
Category
Improvement Request
Jodie12 Holway12 (jholway12)
B04- Governance, Risk and Com...
NA
Improvement Request
Jodie12 Holway12 (jholway12)
B04- Governance, Risk and Com...
NA
Improvement Request
Administrator (epcadmin)
01.01
B02- Corporate Compliance
NA

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

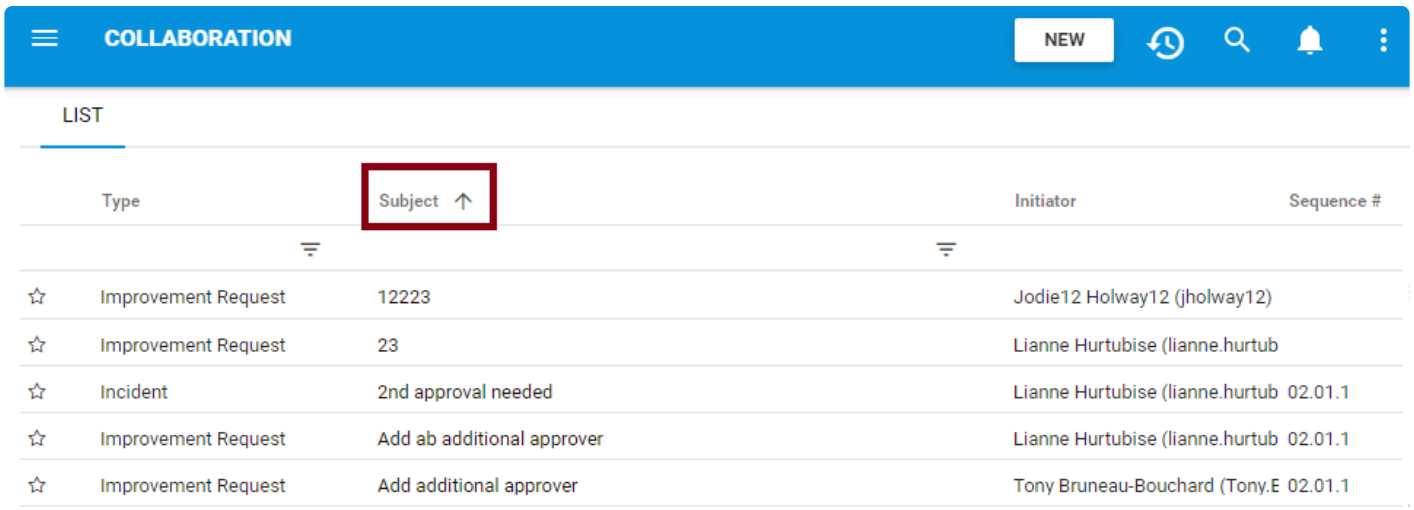
1. Navigate to the Collaboration Module

2. Navigate Cursor to desired **Category**

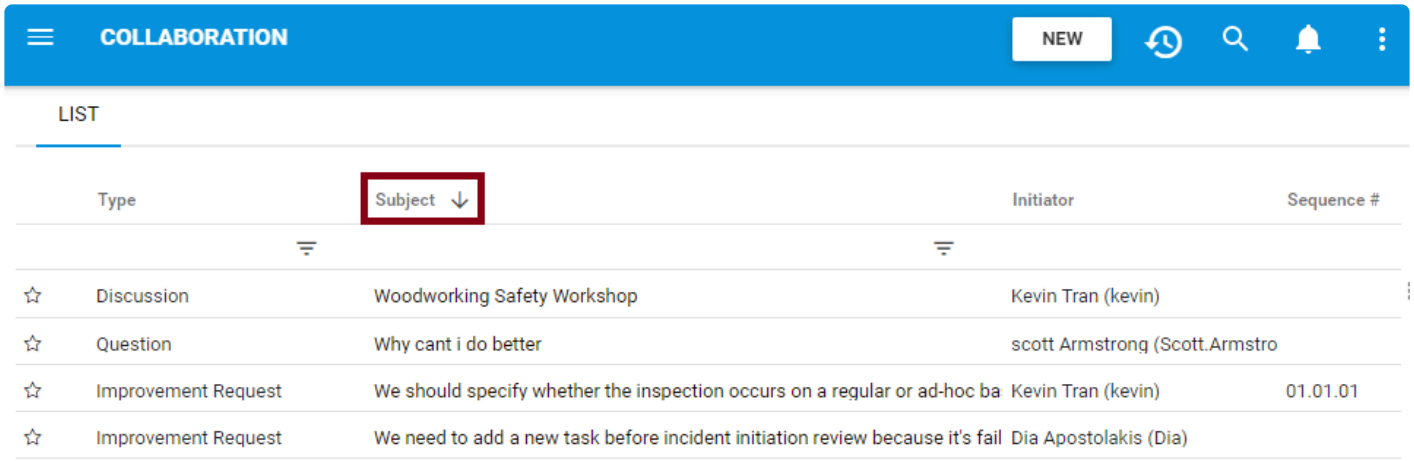
3. Click on the **Category**

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.



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



p(banner tip). 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:

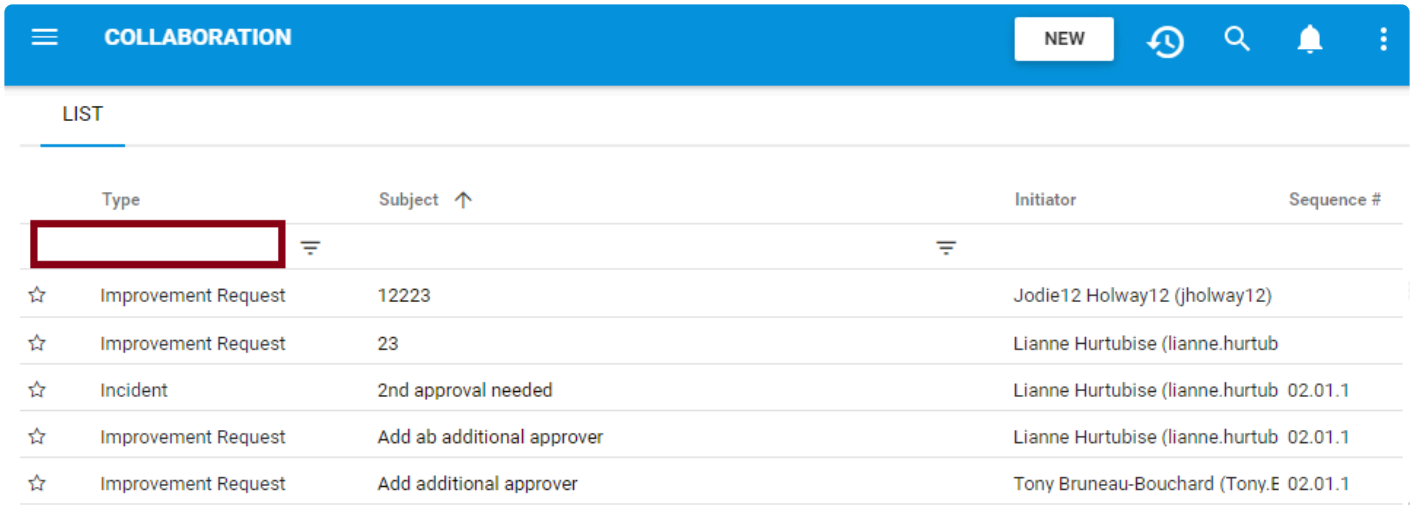
1. How to Add Filters
2. How to Remove Filters
3. How to Combine Filters

4.12.1.1.2.1 Add filter

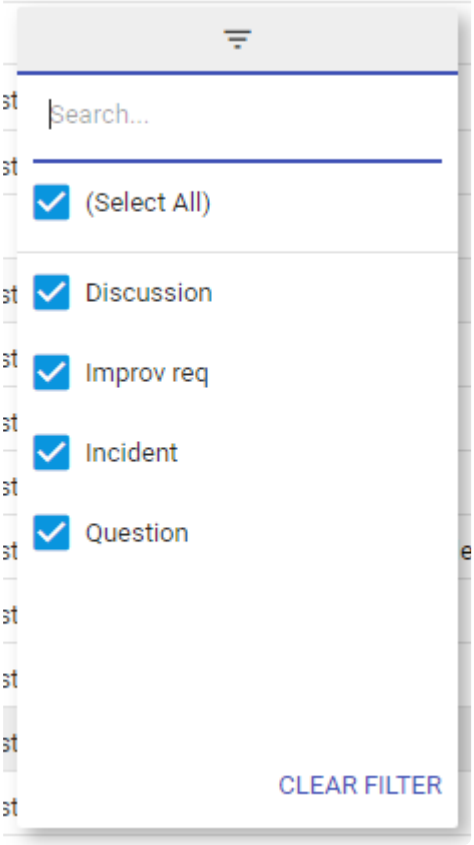
You can add filters to see items of your choice. **Type** what you are looking for, **select** the filter in the drop-down menu, or **define the range of dates**.

How to Add Filter

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

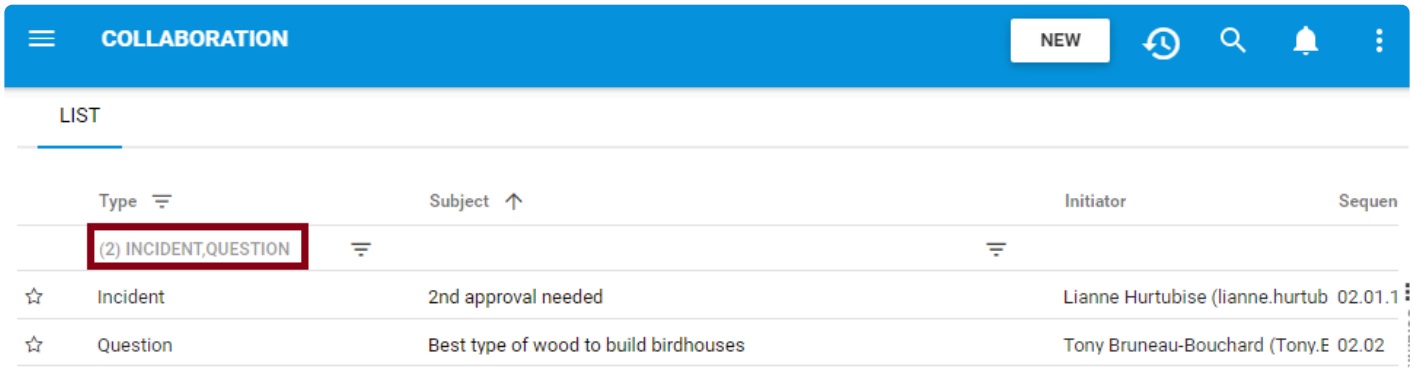


2. Select the box, which will generate a drop down menu



!

3. Select the desired filter. For this example, we will select Discussion and Question.

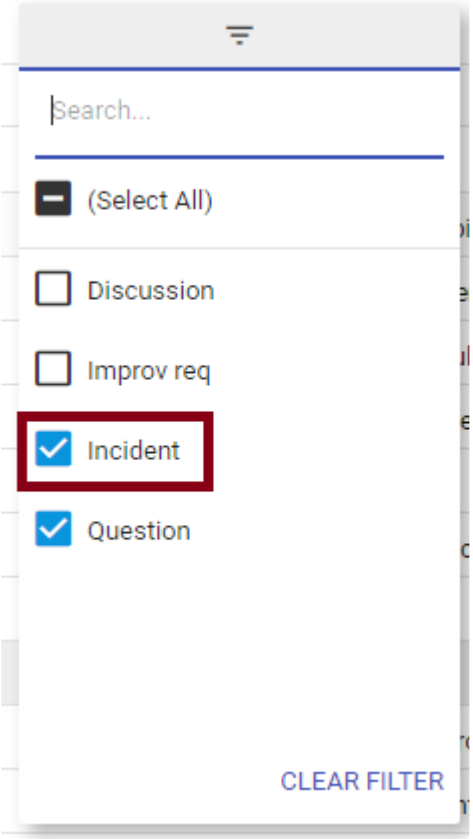


4.12.1.1.2.2 Remove Filter

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.



4.12.1.1.2.3 Combine Filter

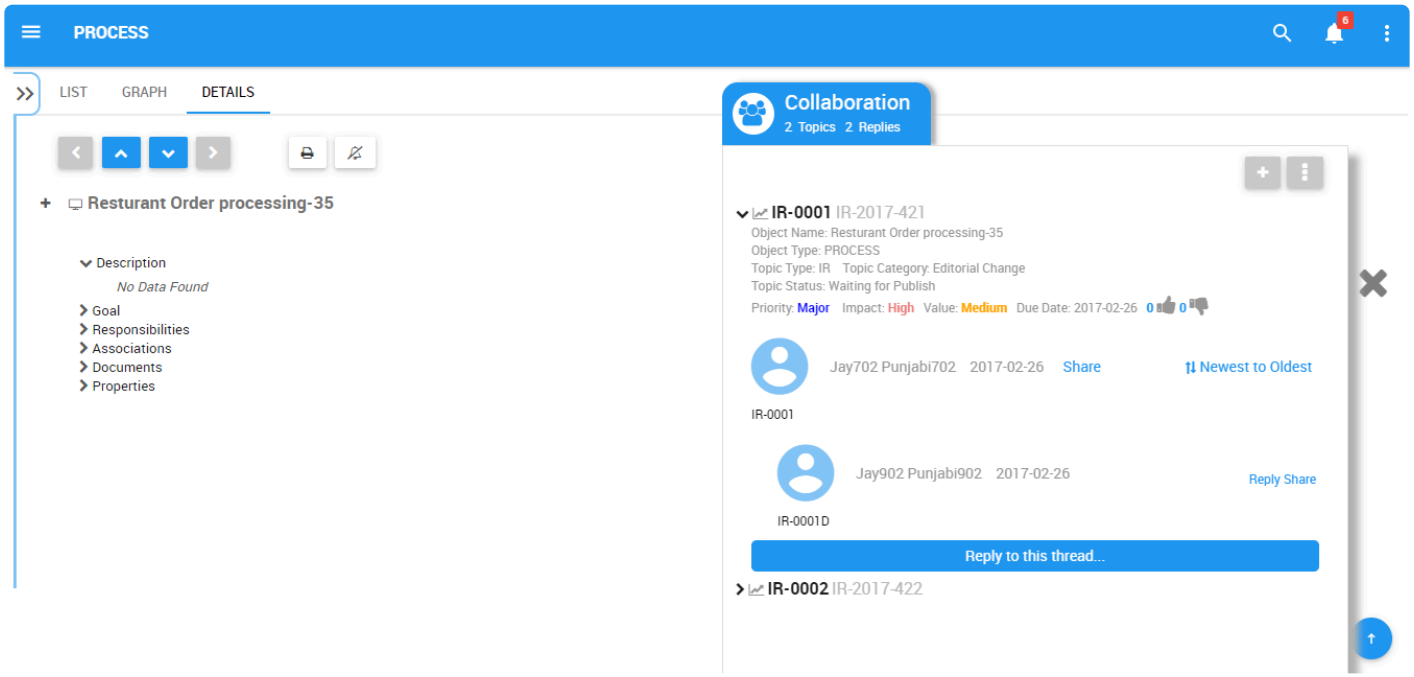
You can combine filters, meaning you can add any other column filter to isolate results. See above to see how to **add** filters.

4.12.1.2 Item Pages

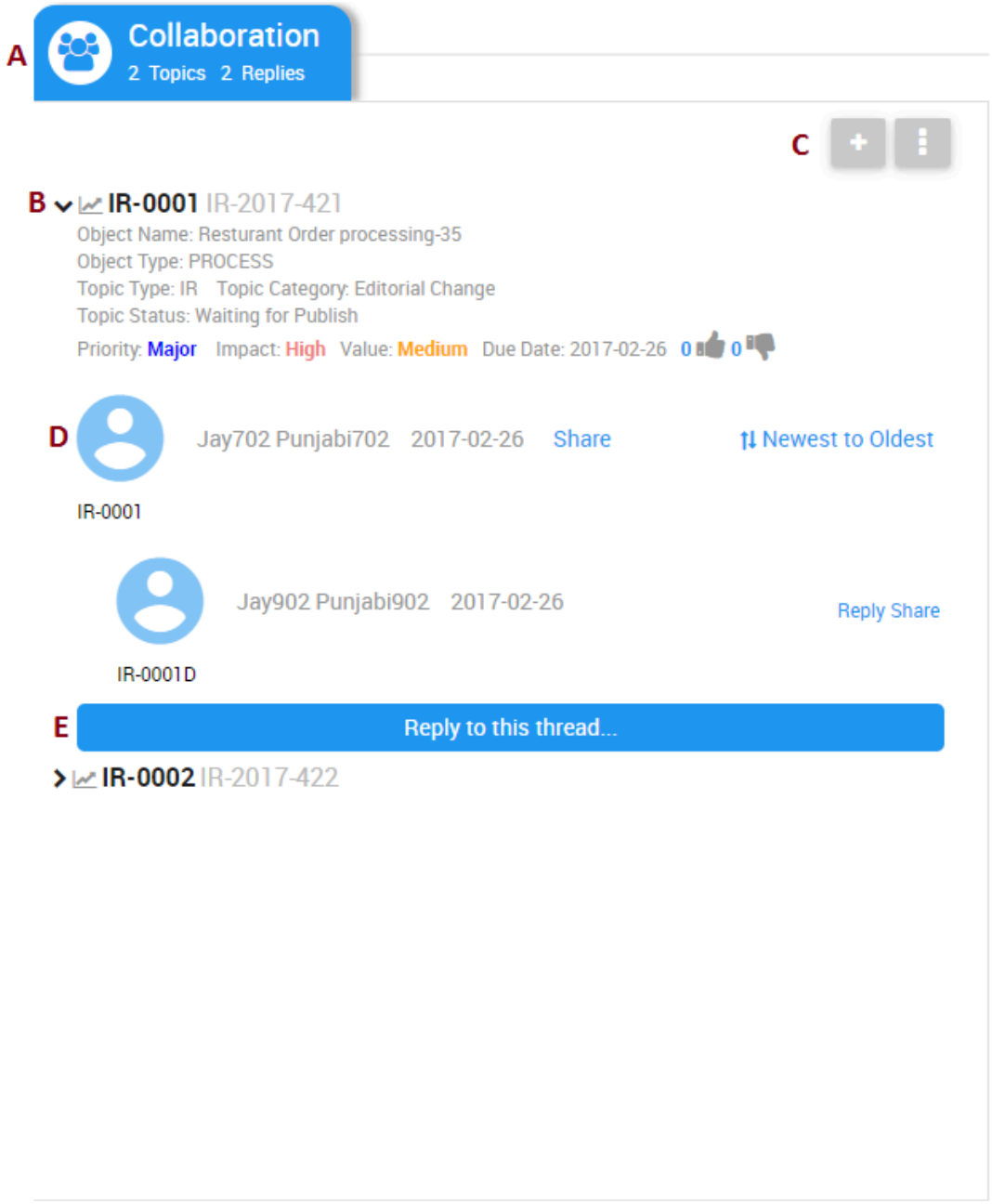
Users can access item's collaboration pages through the specific items pages themselves. This function allows users to immediately engage in collaboration activities within the item they choose to discuss. This allows users to view, analyze and propose changes to items directly.

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 collaboration pop-up window features a variety of key information that users should be aware of:



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.

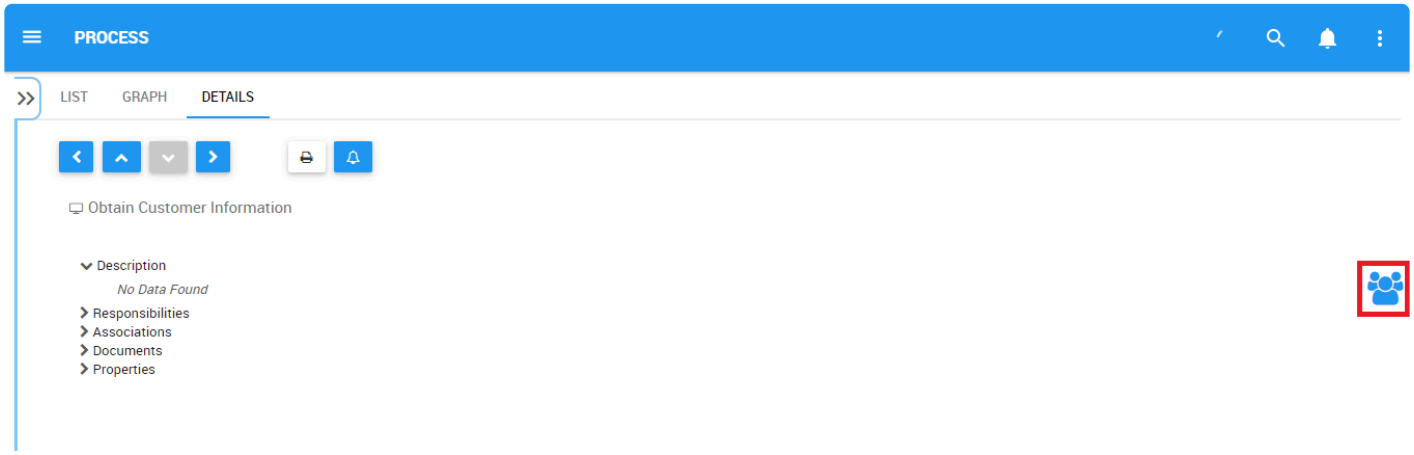
4.12.2.1 Initiating Collaboration

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).

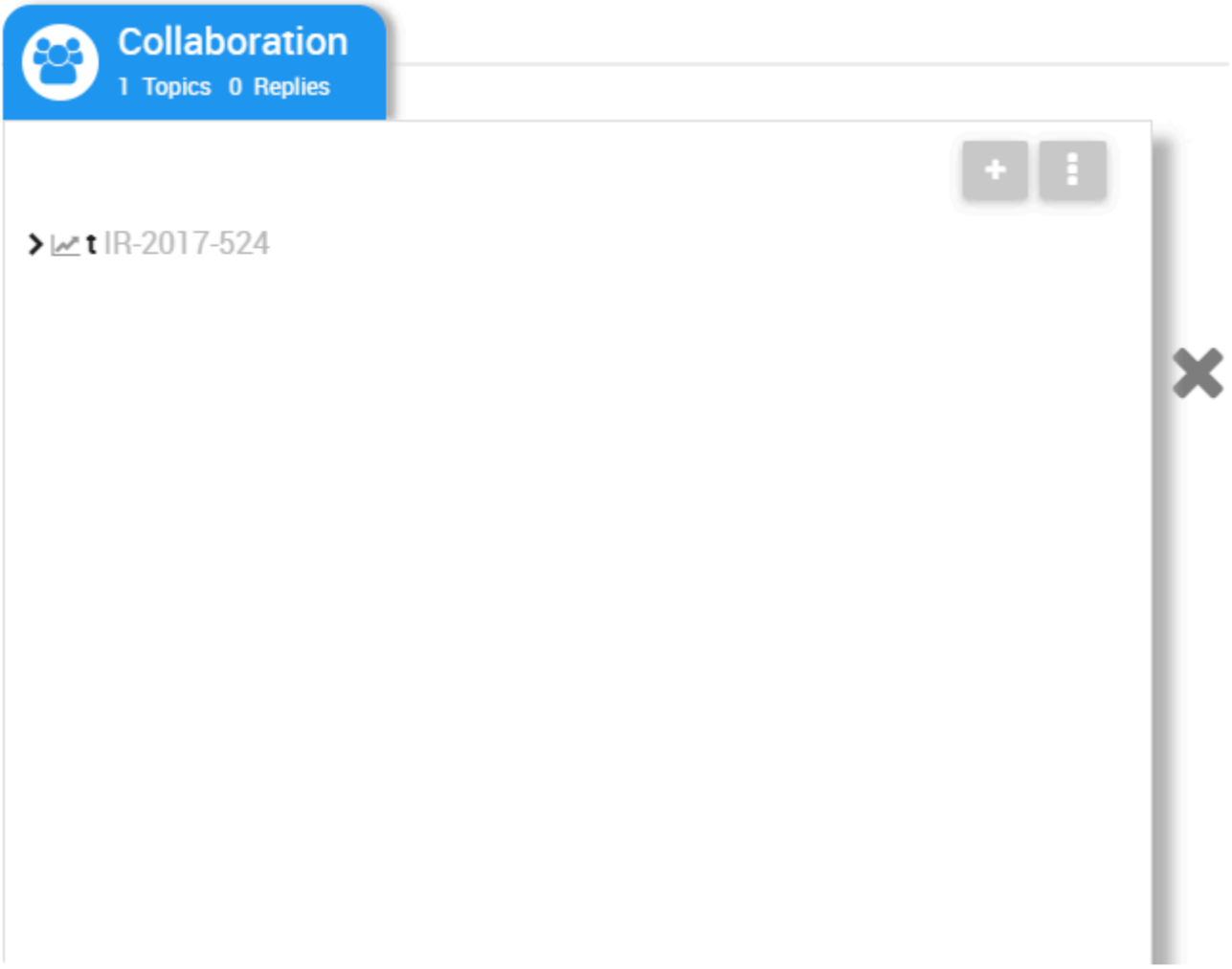
For further details on how to initiate a collaboration activity, please see the steps below:

1. Navigate to an item's Details page. For this example we will be selecting the "Obtain Customer Information" Task.

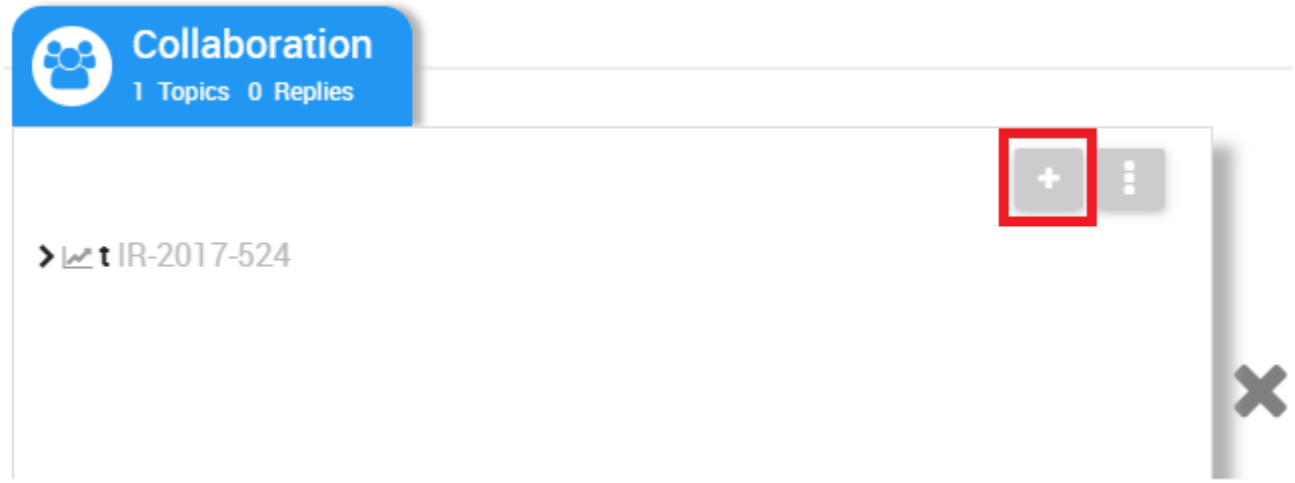
2. Select the icon on the right side of the screen



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

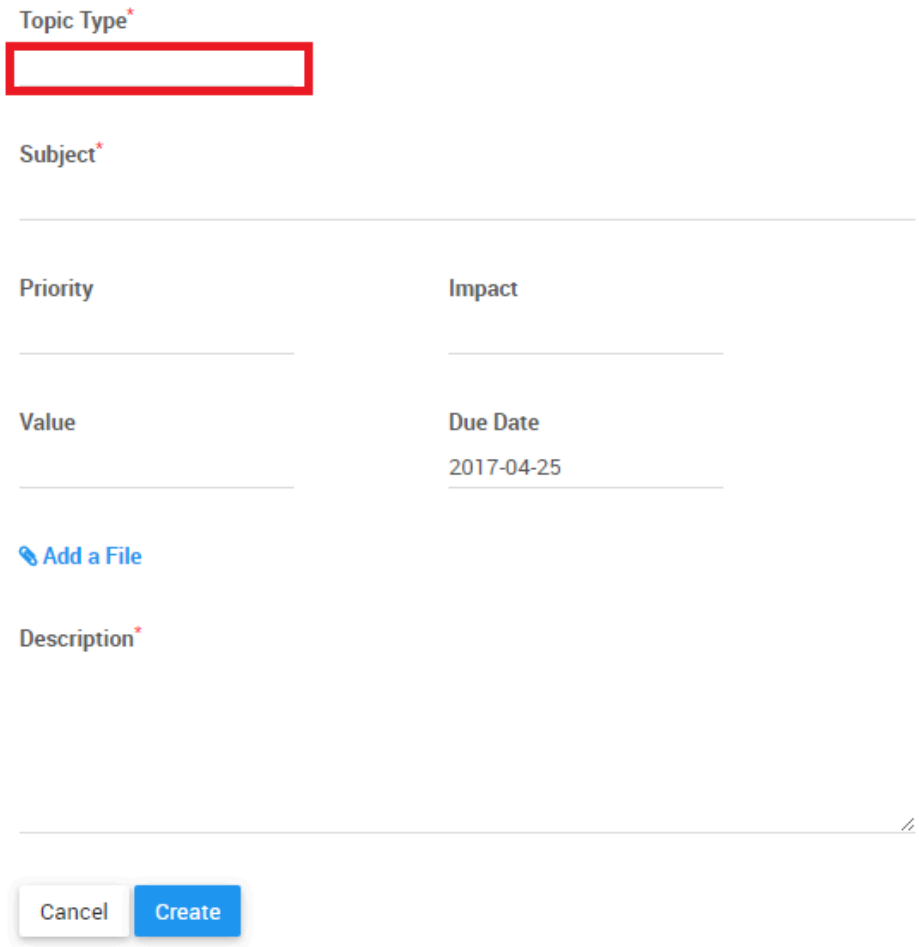
Description*

Cancel Create

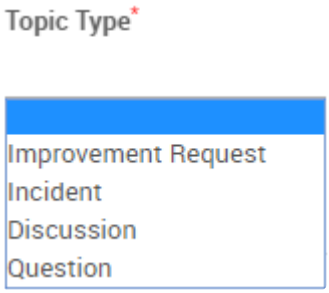
6. Once populating the desired field, select the Create icon and it will initiate a collaboration engagement. For details on the specific fields, please see the sections below.

Select **Topic Type**:

a. Select the **Topic Type** text bar



b. This will generate a drop-down menu with the following options



c. Select the desired collaboration engagement

Enter **Subject**:

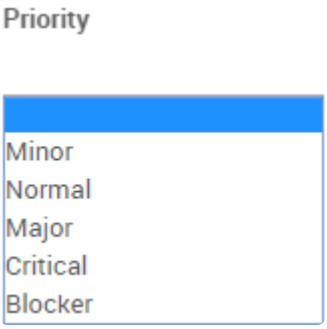
a. Navigate to the Subject text bar

b. With your keyboard enter the desired subject

Select **Priority**:

a. Navigate to Priority text bar

b. This will generate a drop-down menu with the following options

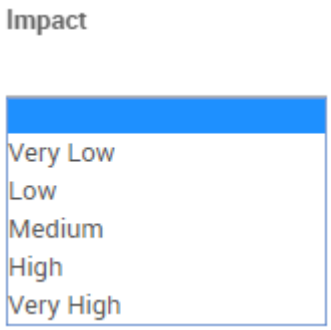


c. Select the desired priority rating

Select **Impact**:

a. Navigate to Impact text bar

b. This will generate a drop-down menu with the following options



c. Select the desired priority rating

Select **Value**:

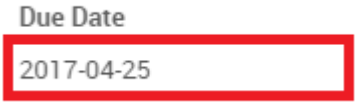
a. Navigate to Value text bar

b. This will generate a drop-down menu with the following options

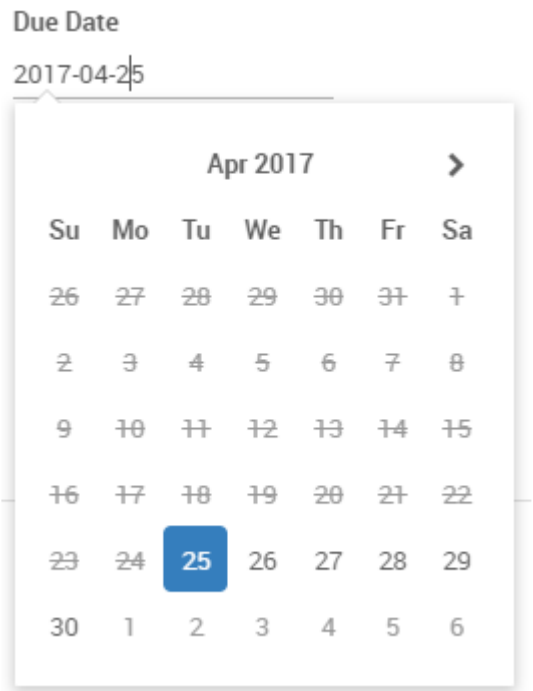
c. Select the desired priority rating

Select **Due Date**:

a. Navigate to Due Date text bar



b. This will generate a drop-down menu with calendar



c. Select the desired due date

Adding a File:

a. Navigate to Add a File section

b. Select the icon

c. Select the file you desire to add to the collaboration engagement

Adding a **Description**:

a. Navigate to the Description text bar

b. With your keyboard enter the desired description

All fields denominated by * are required fields. These fields must be completed to successfully create a collaboration engagement

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)

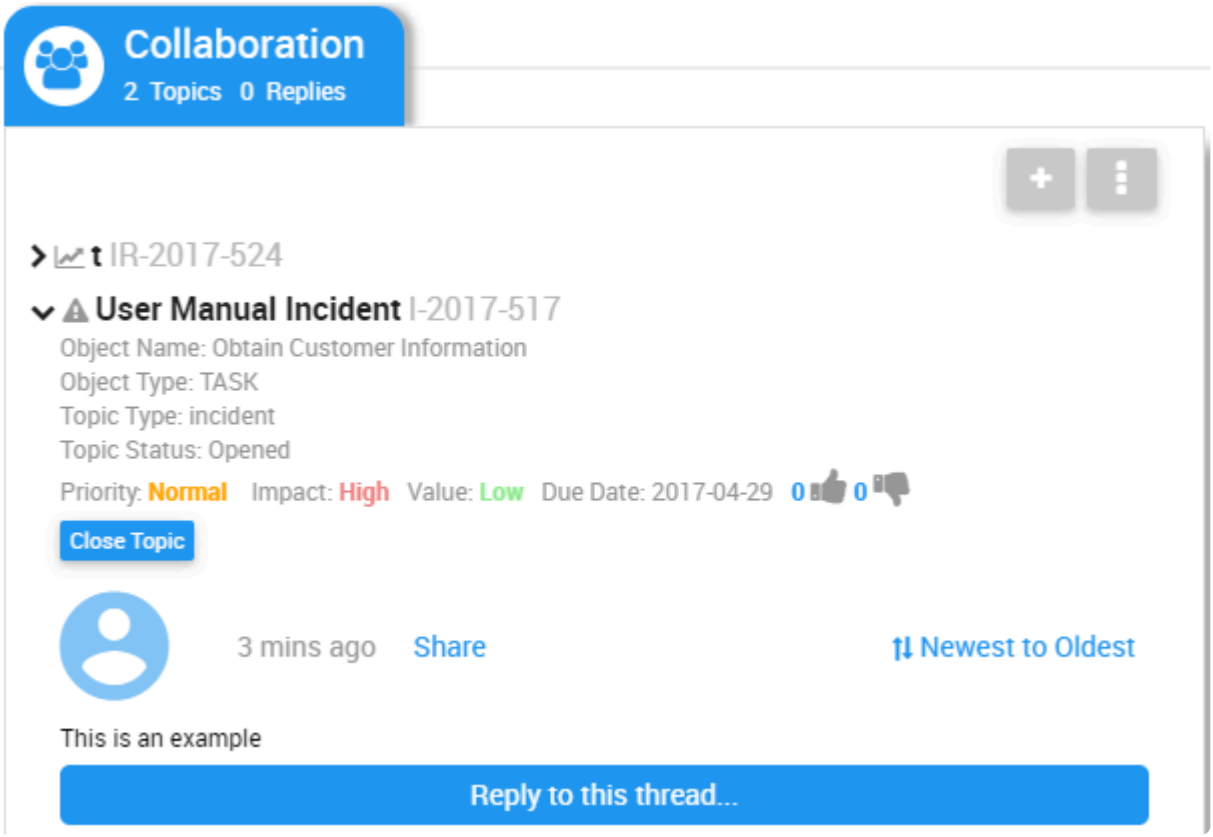
4.12.2.2.1 Reply

Users can reply to collaboration engagements within the collaboration window. Users are encourgared to share their opinions and perspectives to further promote continuous improvement within an organization.

To Reply to a collaboration engagement, please see the steps below:

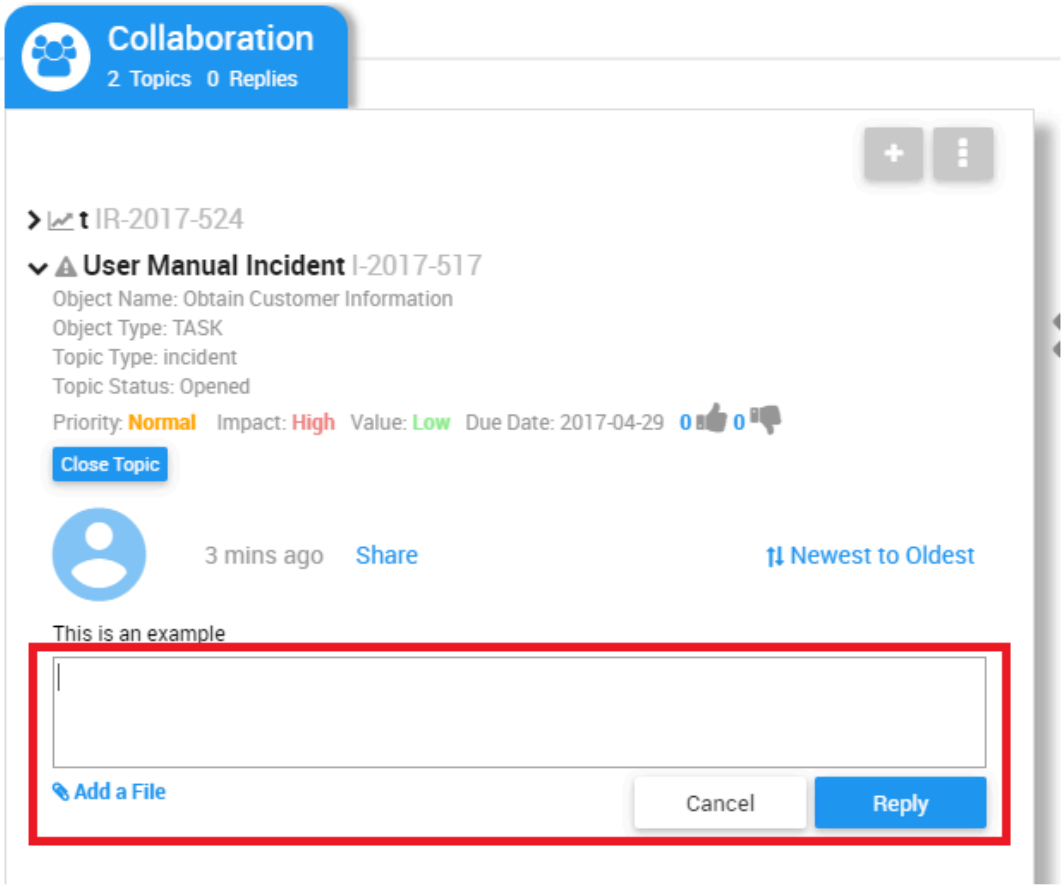
1. Navigate to the object subject to a collaboration engagement

2. Open the collaboration window



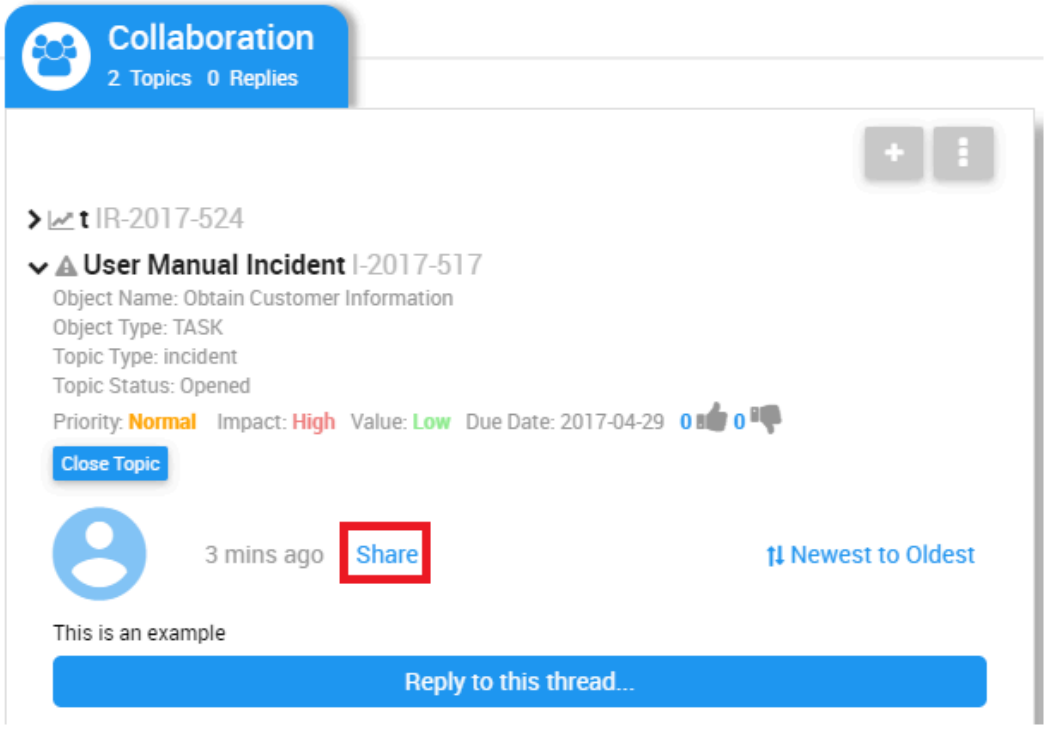
3. Select the “Reply to this thread…” button

4. This will generate a textbox where users can enter their response and attach a file if necessary


Collaboration
2 Topics 0 Replies
IR-2017-524
User Manual Incident I-2017-517
Object Name: Obtain Customer Information
Object Type: TASK
Topic Type: incident
Topic Status: Opened
Priority: Normal Impact: High Value: Low Due Date: 2017-04-29 0 0
Close Topic
3 mins ago Share
Newest to Oldest
This is an example
Add a File
Cancel
Reply

4.12.2.2.2 Share

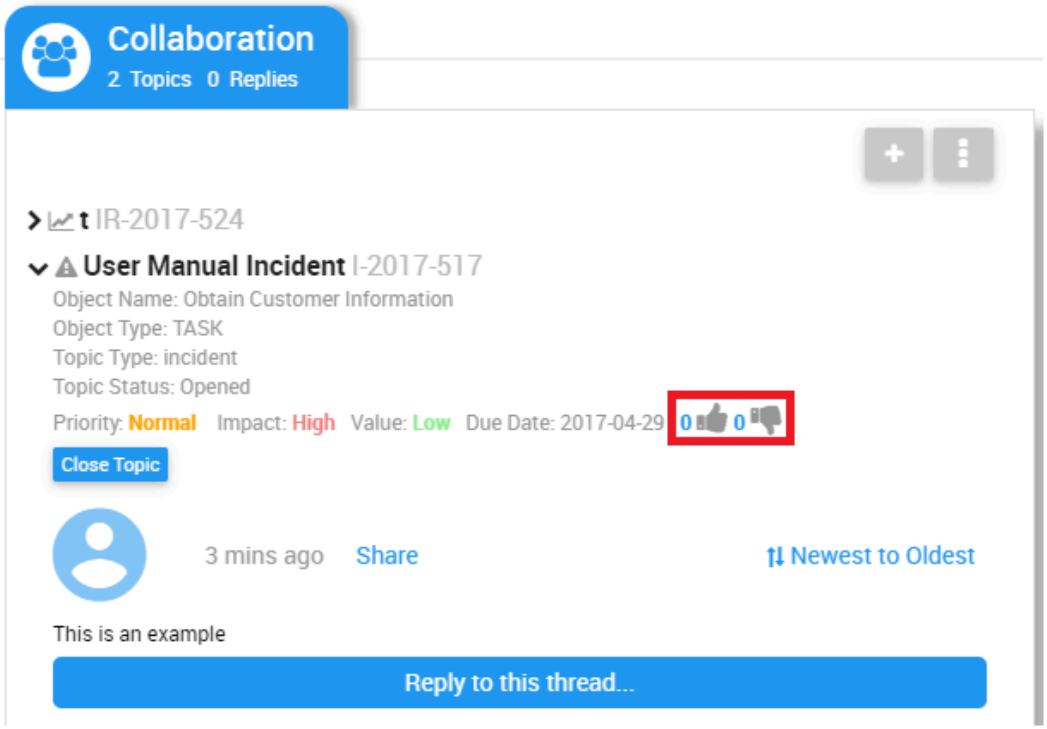
Users can share collaboration engagements with other parties to facilitate communication. To do so, users can select the Share icon, providing users with a URL they can share with others.



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 0 0 icon. Users can vote by clicking on the “Thumbs Up” or Thumbs Down” button. Dependent on the scenario, users may voluntarily or may be mandated to vote on collaboration engagements.



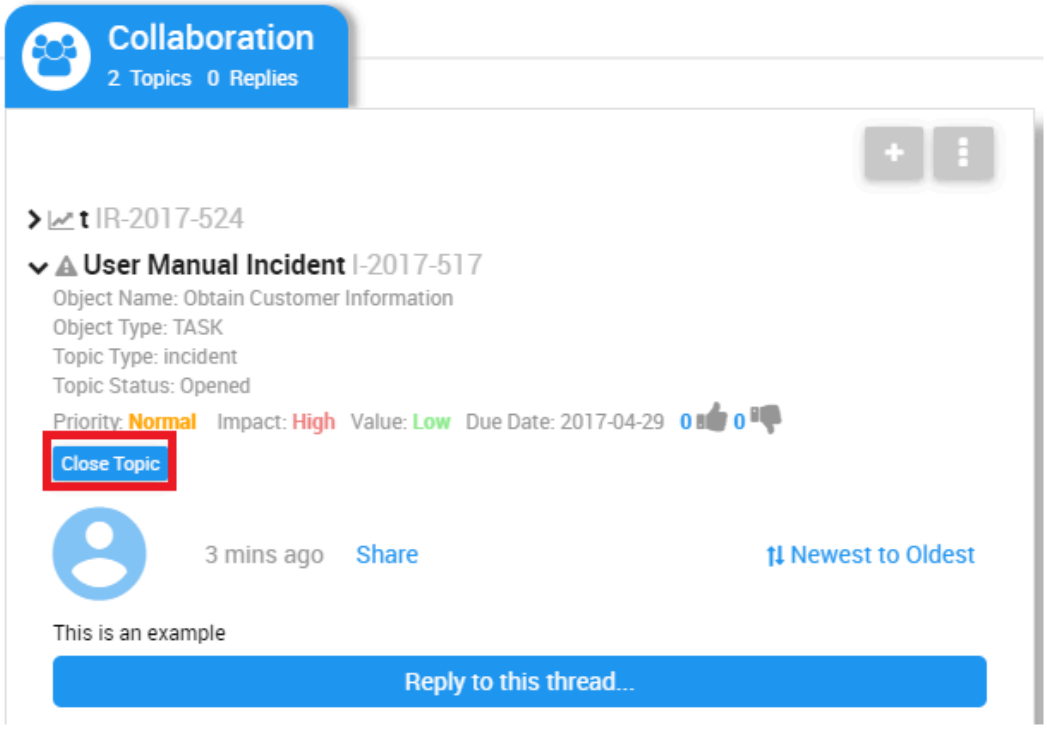
4.12.2.2.4 Close Topic

Once a collaboration engagement accomplishes its desired goal, it can be closed by select users.

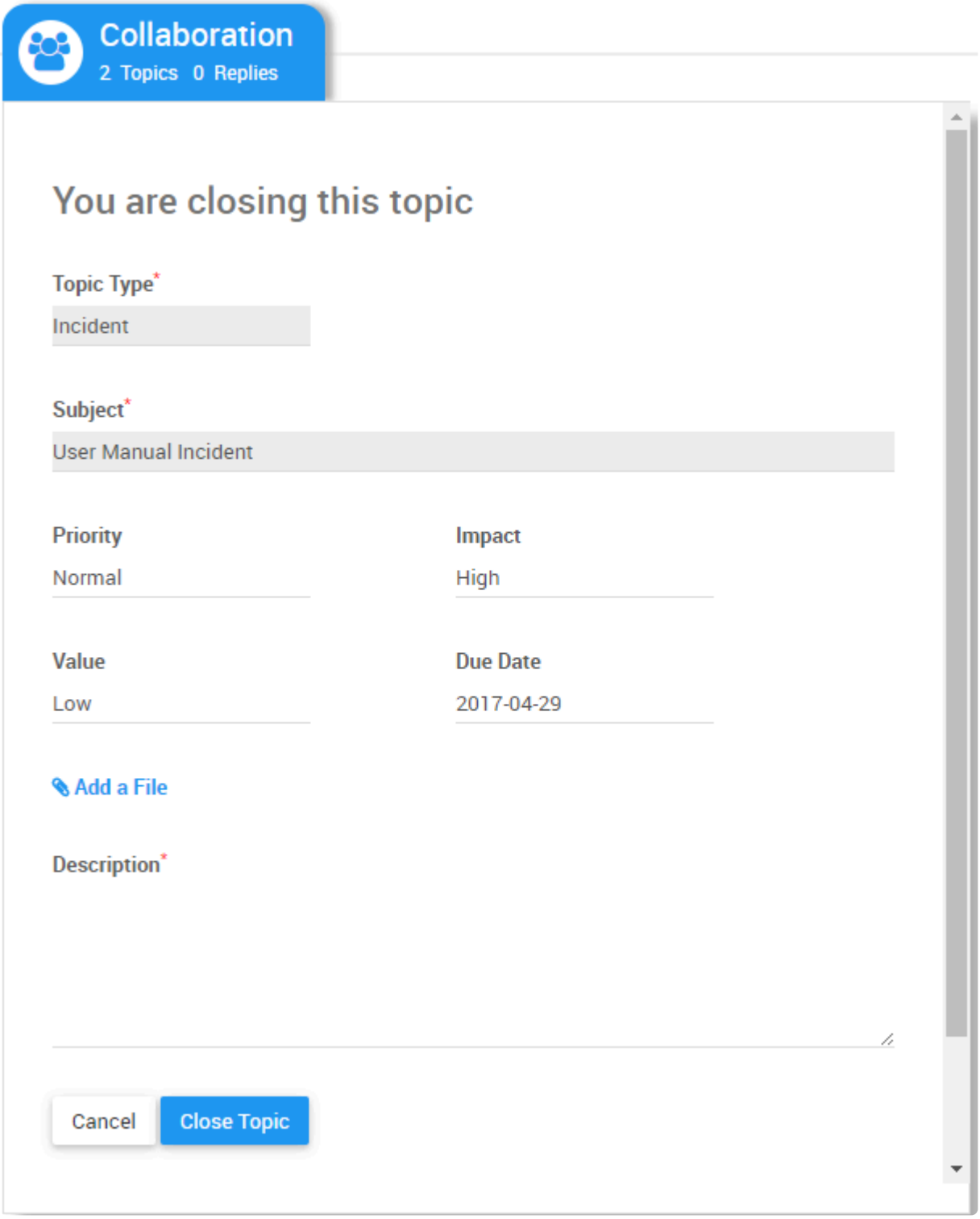
Three types of users can close engagements:

1. Collaboration Engagement Initiators
2. Process Owners (Users Assigned as Accountable)
3. Administrators (Only for Improvement Requests)

To close the engagement, click on the Close Topic icon.



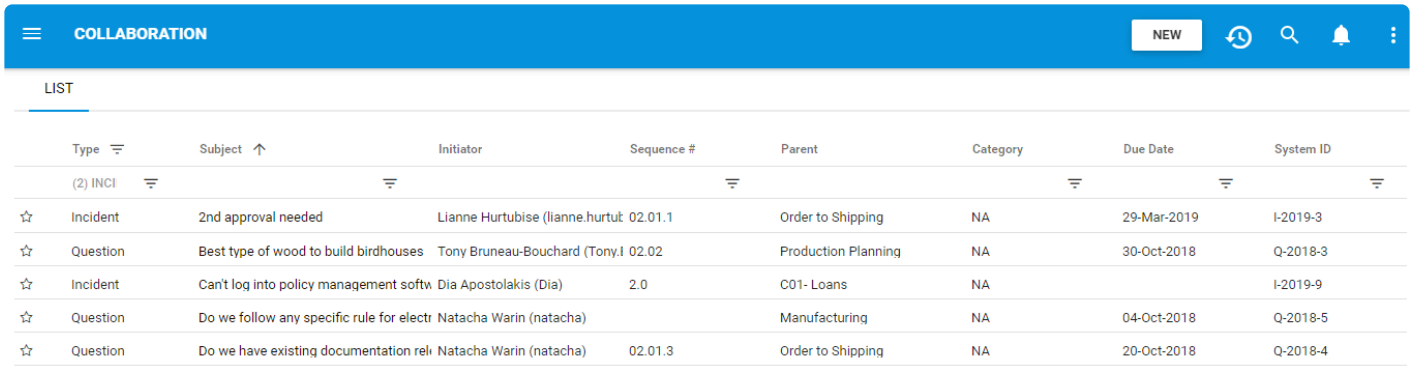
From here, a user will be able to **review** and **confirm** engagement termination in a subsequent window. Users will be required to provide a description once terminating a collaboration engagement.


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.



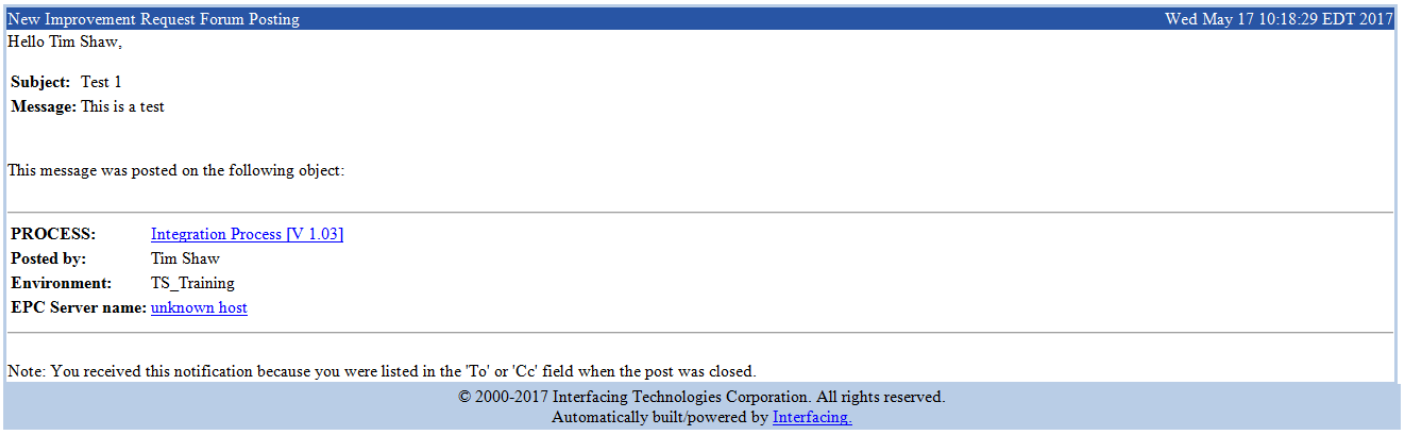
To view further details regarding each collaboration engagement, users will need to navigate to the collaboration page of specific items.

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



New Improvement Request Forum Posting Wed May 17 10:18:29 EDT 2017

Hello Tim Shaw,

Subject: Test 1
Message: This is a test

This message was posted on the following object:

PROCESS: Integration Process [V 1.03]
Posted by: Tim Shaw
Environment: TS_Training
EPC Server name: unknown host

Note: You received this notification because you were listed in the 'To' or 'Cc' field when the post was closed.

© 2000-2017 Interfacing Technologies Corporation. All rights reserved.
Automatically built/powered by Interfacing.

2. In-App Notification

Test 1 was **created** for *Integration Process*

Test 1 (Improvement Request) for Integration Process (Process) was **created** by Tim Shaw(timshaw1) on May 17, 2017 10:18:29 AM

8 minutes ago | Topic Created

4.12.3 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.

© 2020 Interfacing Technologies Corporation

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.

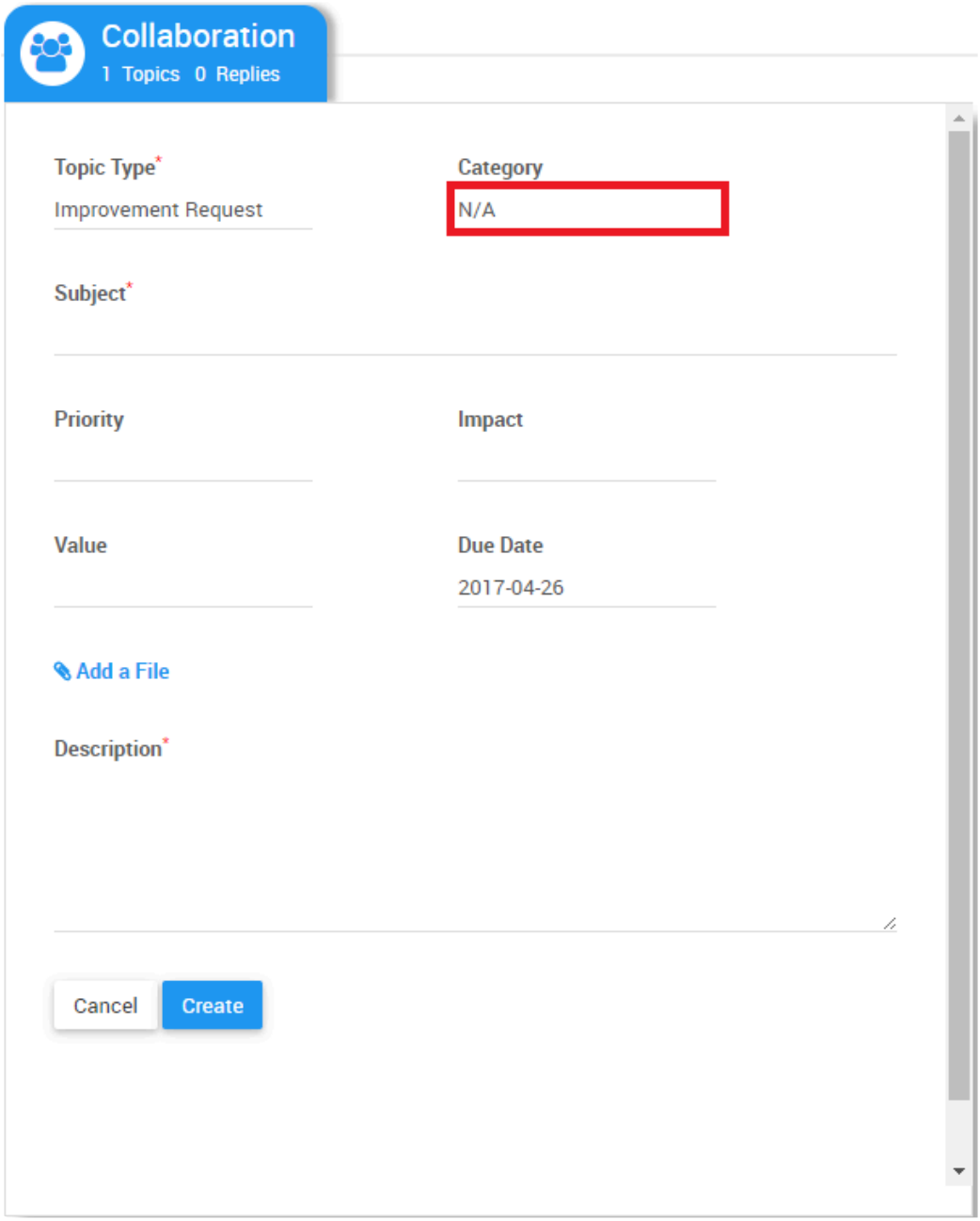
Improvement Request	Description
Association Changes	Users can propose alternative and/or new associations for specific items or processes. E.g. An HR Manager (Role) should be assigned as Responsible for the “Compose Job Description” Task
Description Changes	Users can propose alternative descriptions 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 the Accountable users, will be **notified** and will be requested to comment and/or **vote** on the proposed activity. Further details on notification can be found below.

Accountable users on processes are called Process Owners.

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.



Improvement Request Cycle

1. User creates Improvement Request
2. Involved individuals, including the Accountable user, will be notified of new Improvement Request
3. Involved users will comment and/vote on the proposed activity
4. Accountable user will approve (or reject) the Improvement Request
5. Accountable user will assign the Improvement Request implementer
6. The Web Modeler implementer will implement the Improvement Request
7. The Accountable user will be notified when changes were implemented, and he will verify them

4.12.6.1 Approve Improvement Request

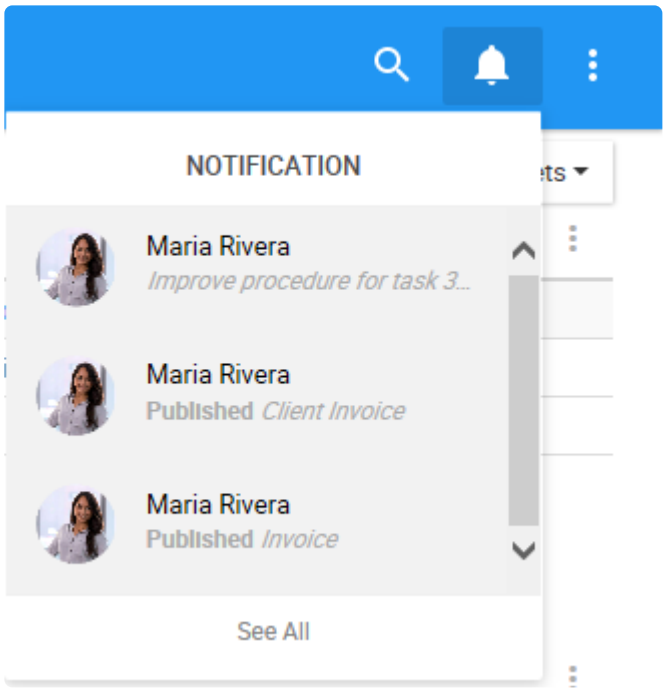
After the Improvement Request is created by an EPC user, users involved, including the accountable user, will receive a notification about the new IR. The Accountable user will have to approve or reject the Improvement Request.

If the Improvement Request is created on an object, the accountable user is called “Process Owner”

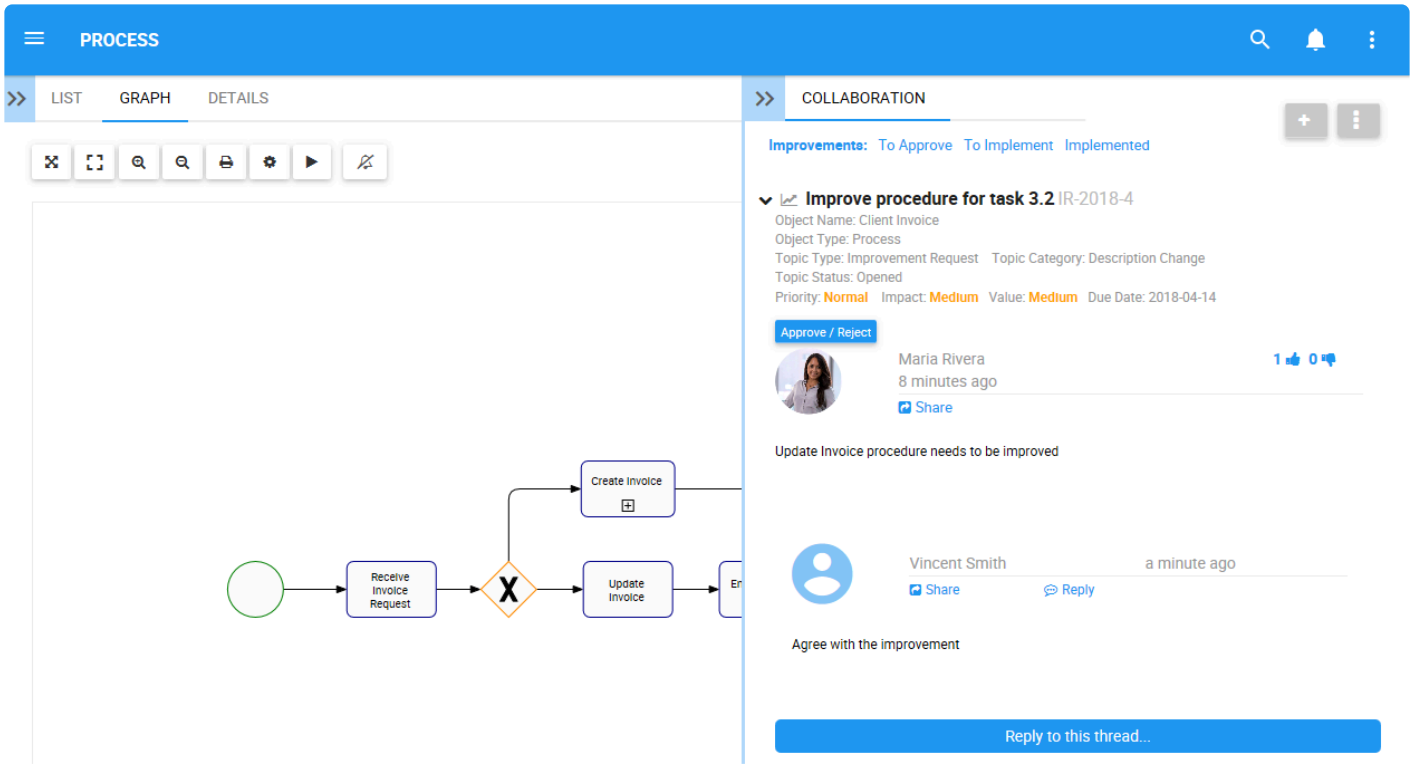
To Approve an Improvement Request, follow these steps

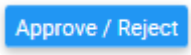
Only users with the “Accountable” responsibility can approve Improvement Requests

1. Receive notification of new Improvement Request

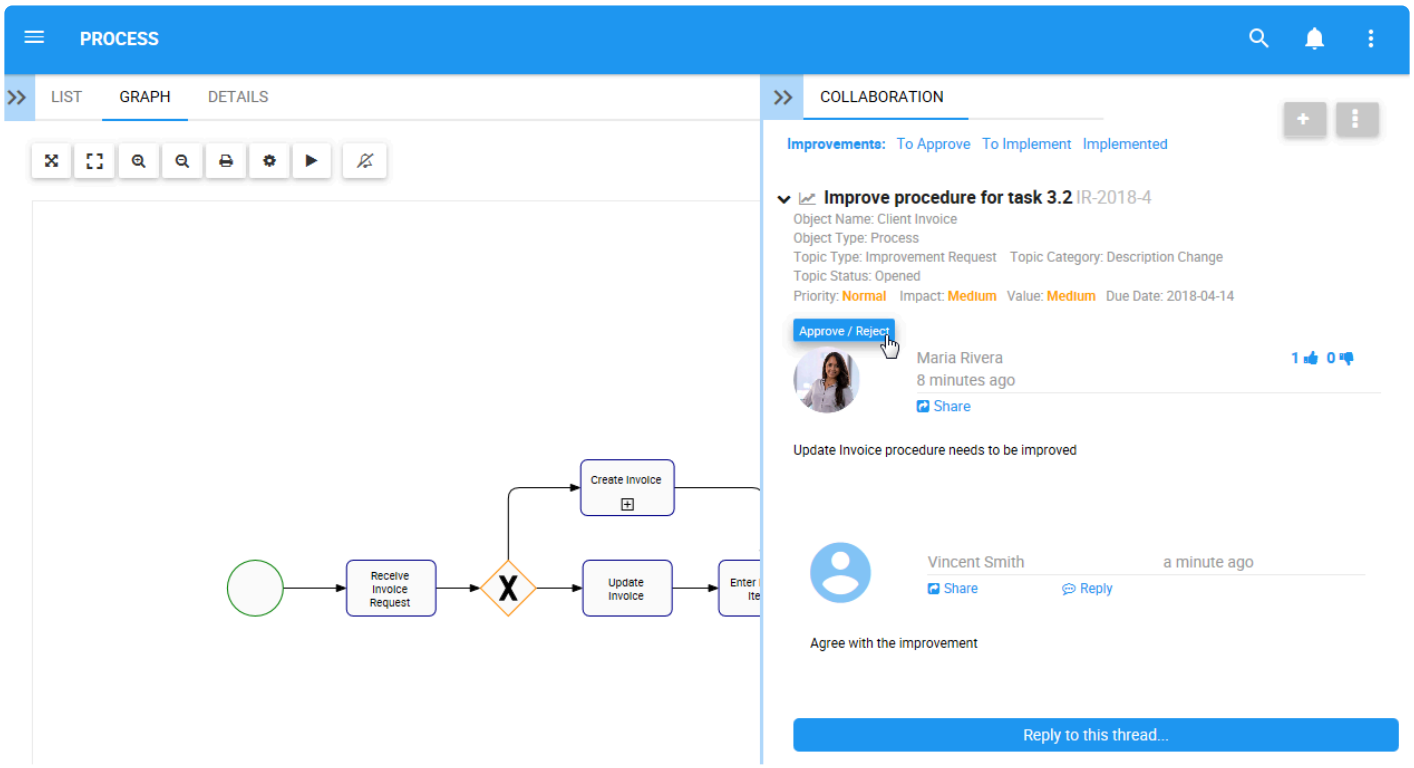


2. Navigate to the object with the Improvement Request. In this example, a process

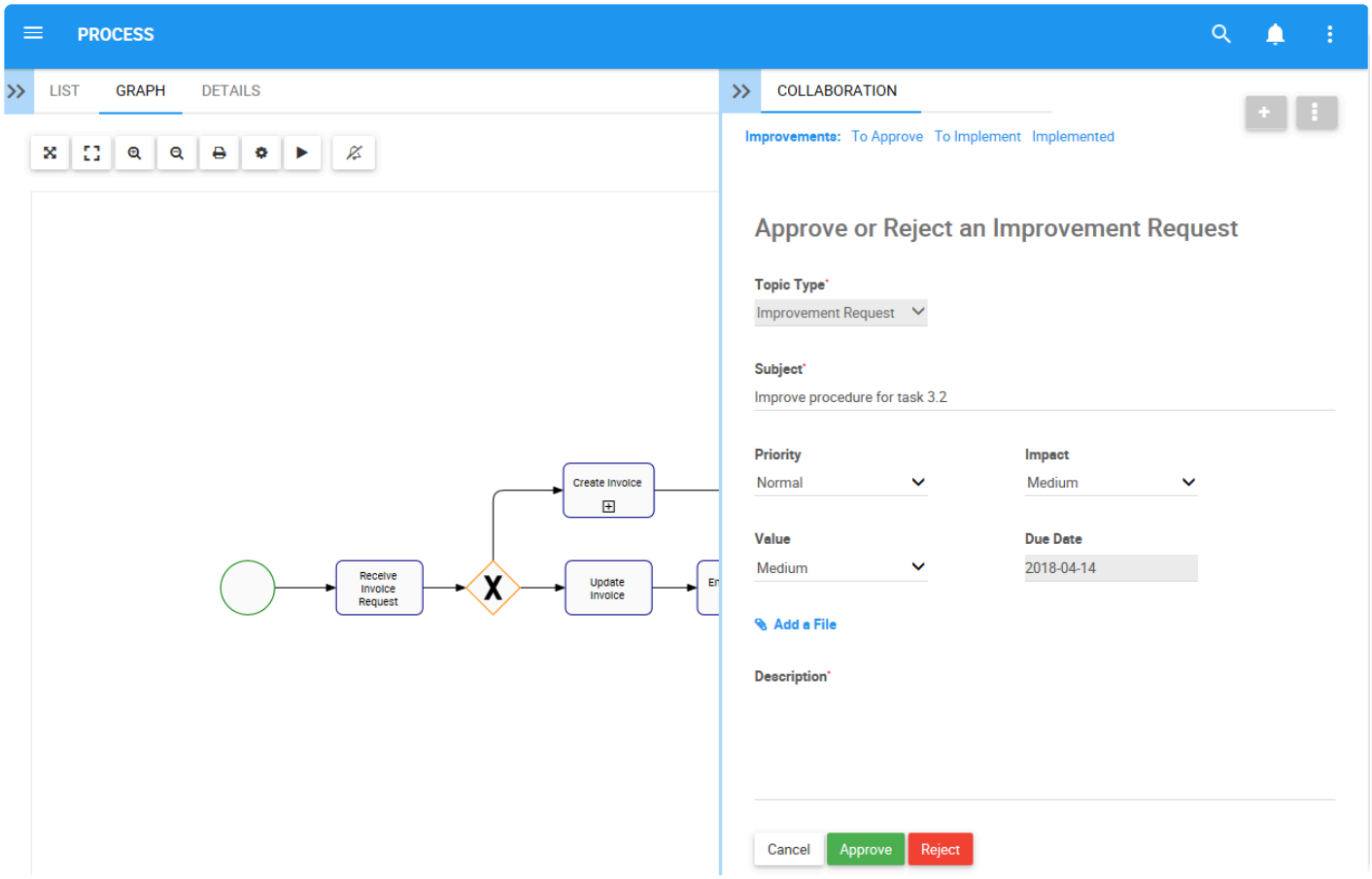


3. After reviewing comments made by users, as well as the votes on the topic, click on the 

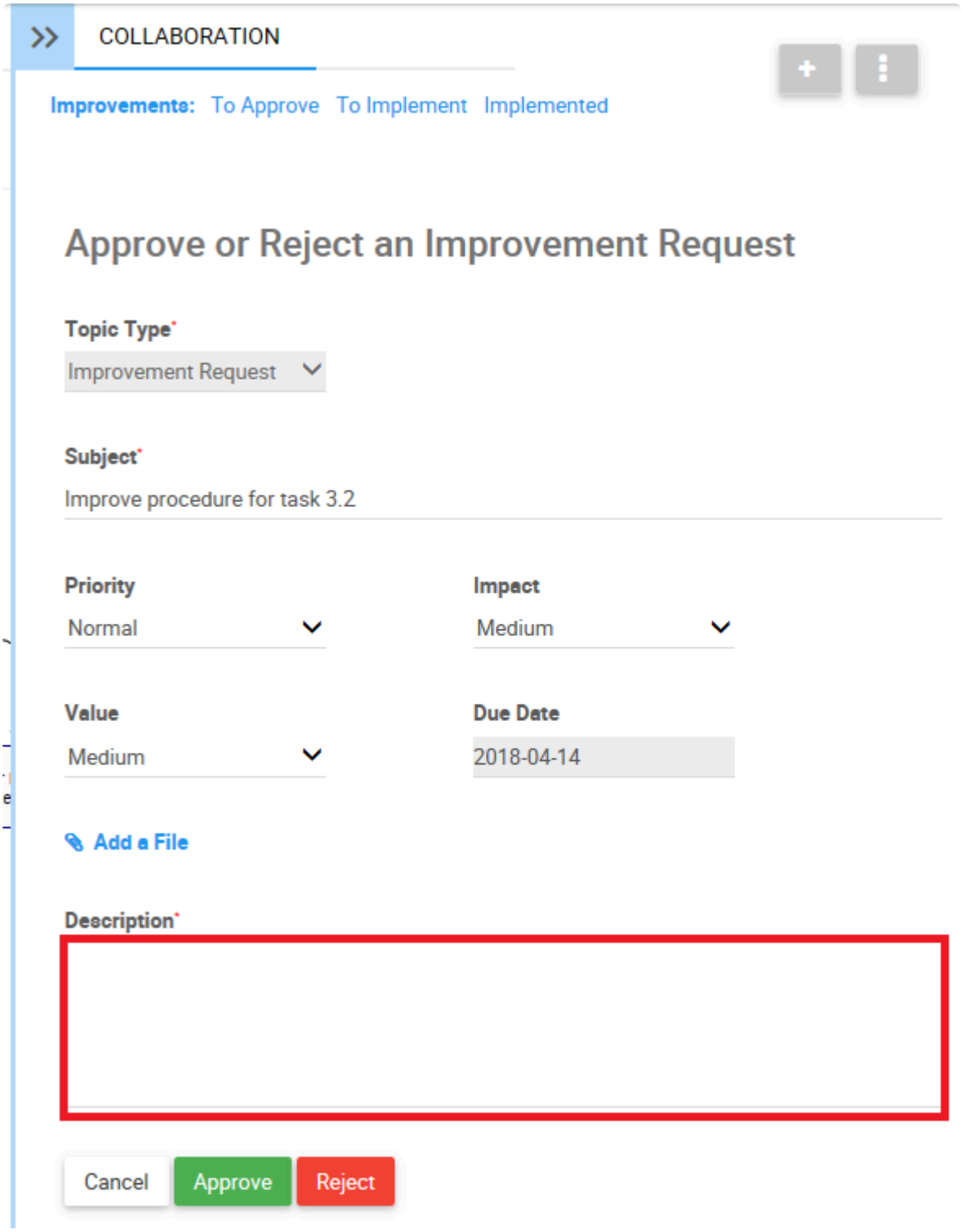
box



4. A new window will be generated where you can approve or reject

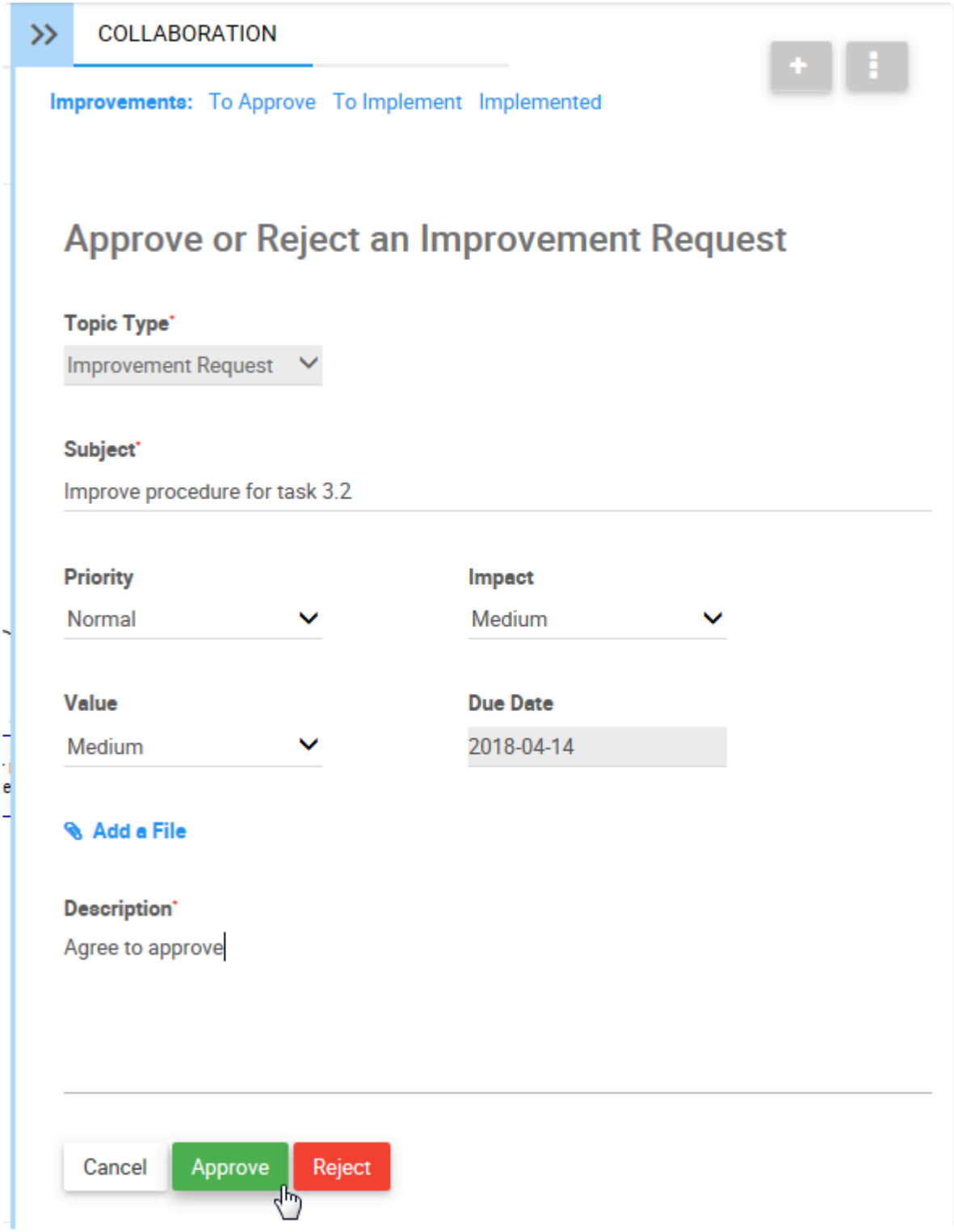


5. Input a description

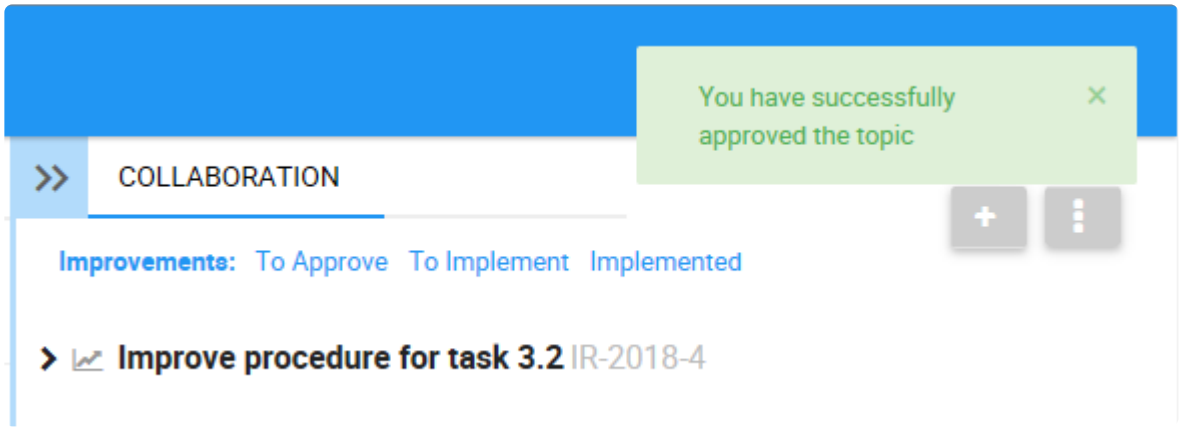


You can also include files

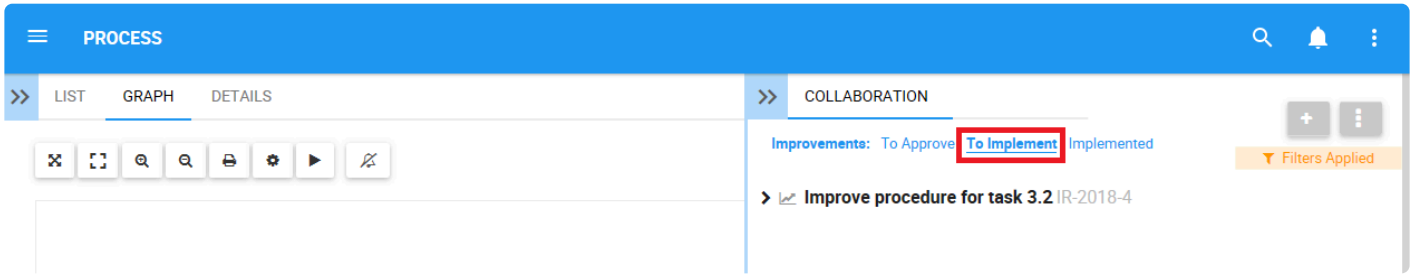
6. To approve the IR click on the Approve box, to reject the IR click on the Reject, to discard the changes click on Cancel. In this example, approve the IR



7. You will receive a notification when you successfully approved or rejected the topic



8. The topic was moved to the “To Implement” section of the collaboration window

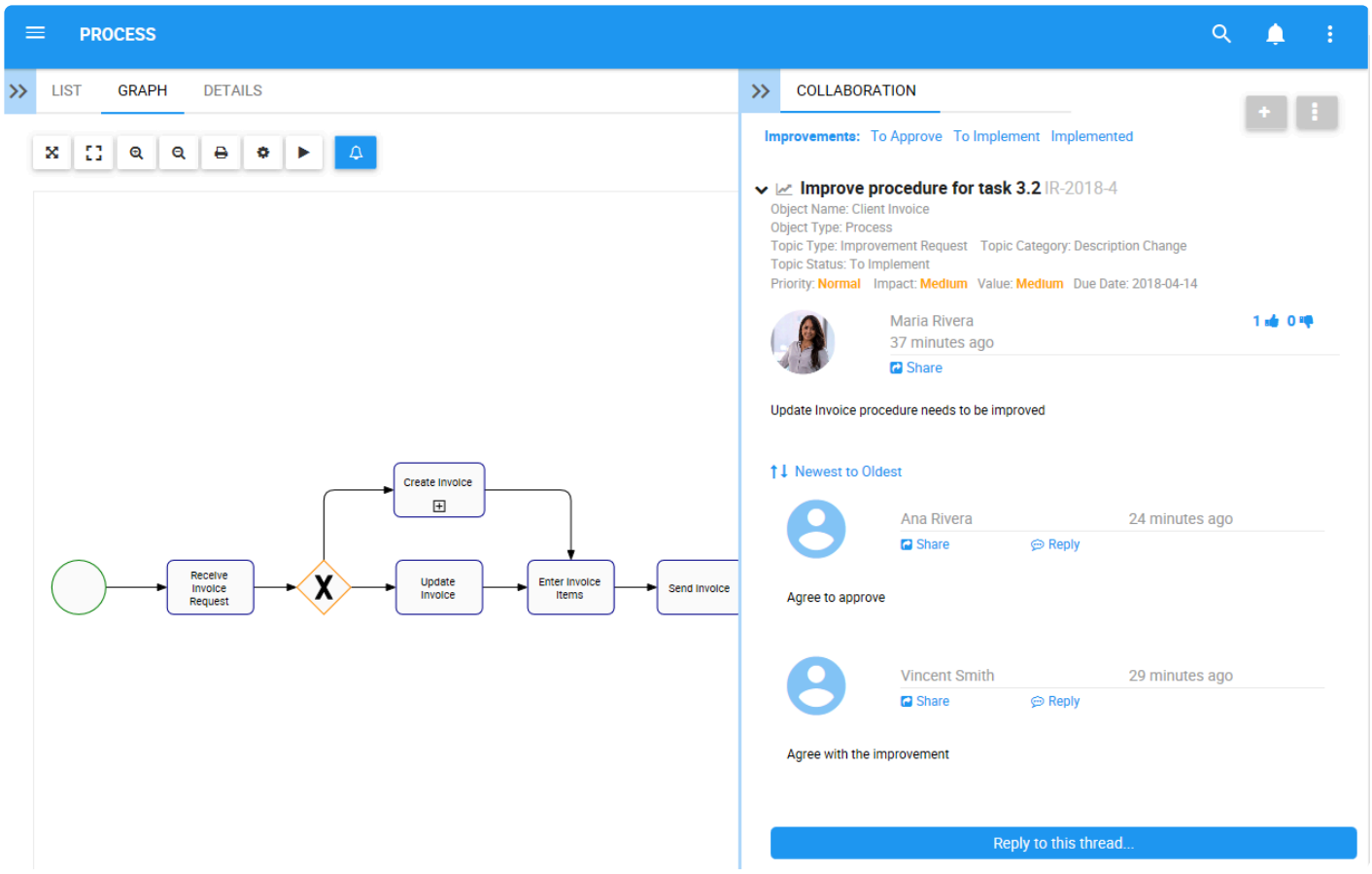


4.12.6.2 Assign IR Implementer

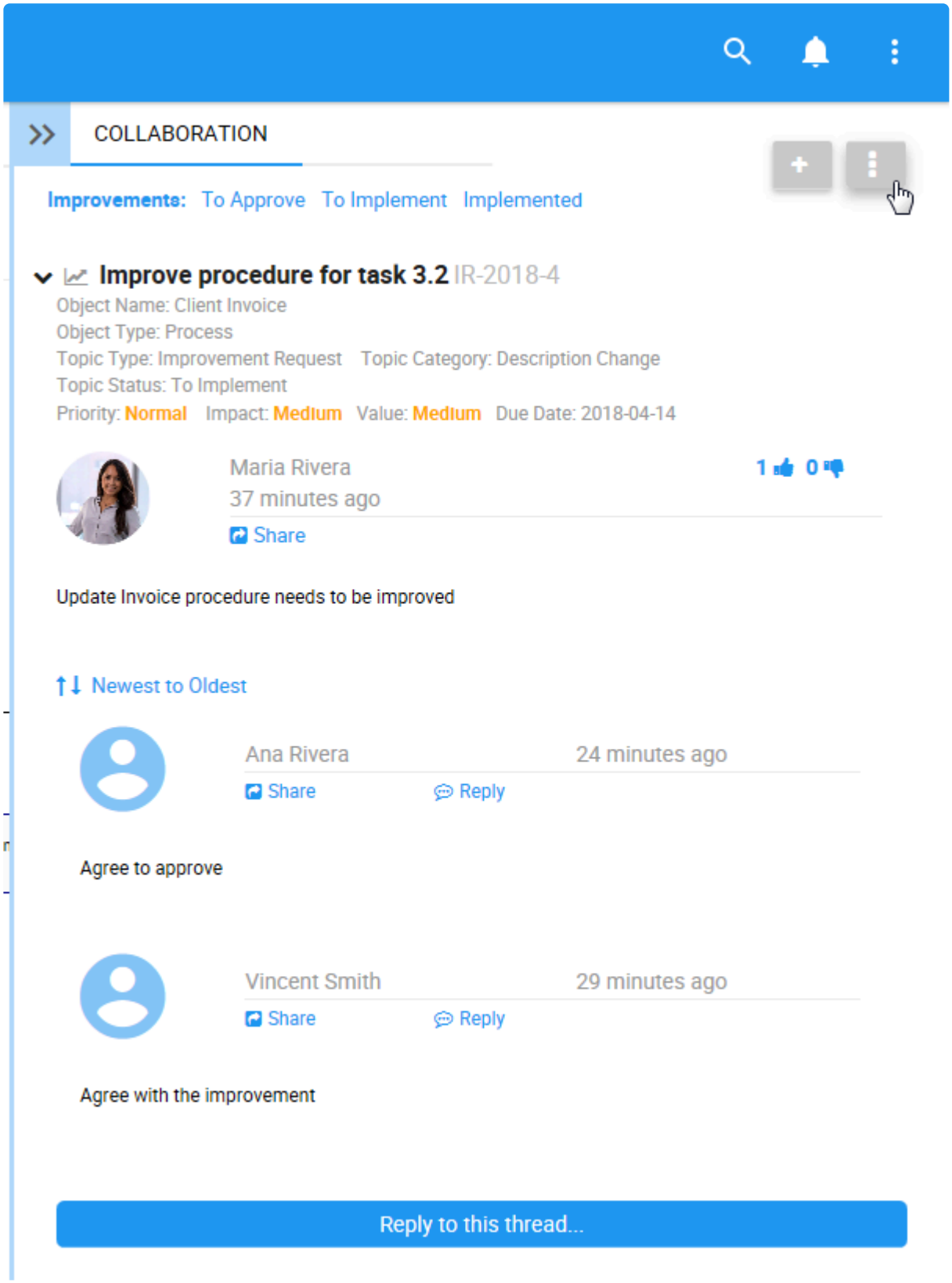
The Accountable User of the object with an Improvement Request is responsible to assign the Web Modeler Implementer. The Implementer will be in charge to implement the changes in the EPC.

To Assign IR Implementer, follow these steps

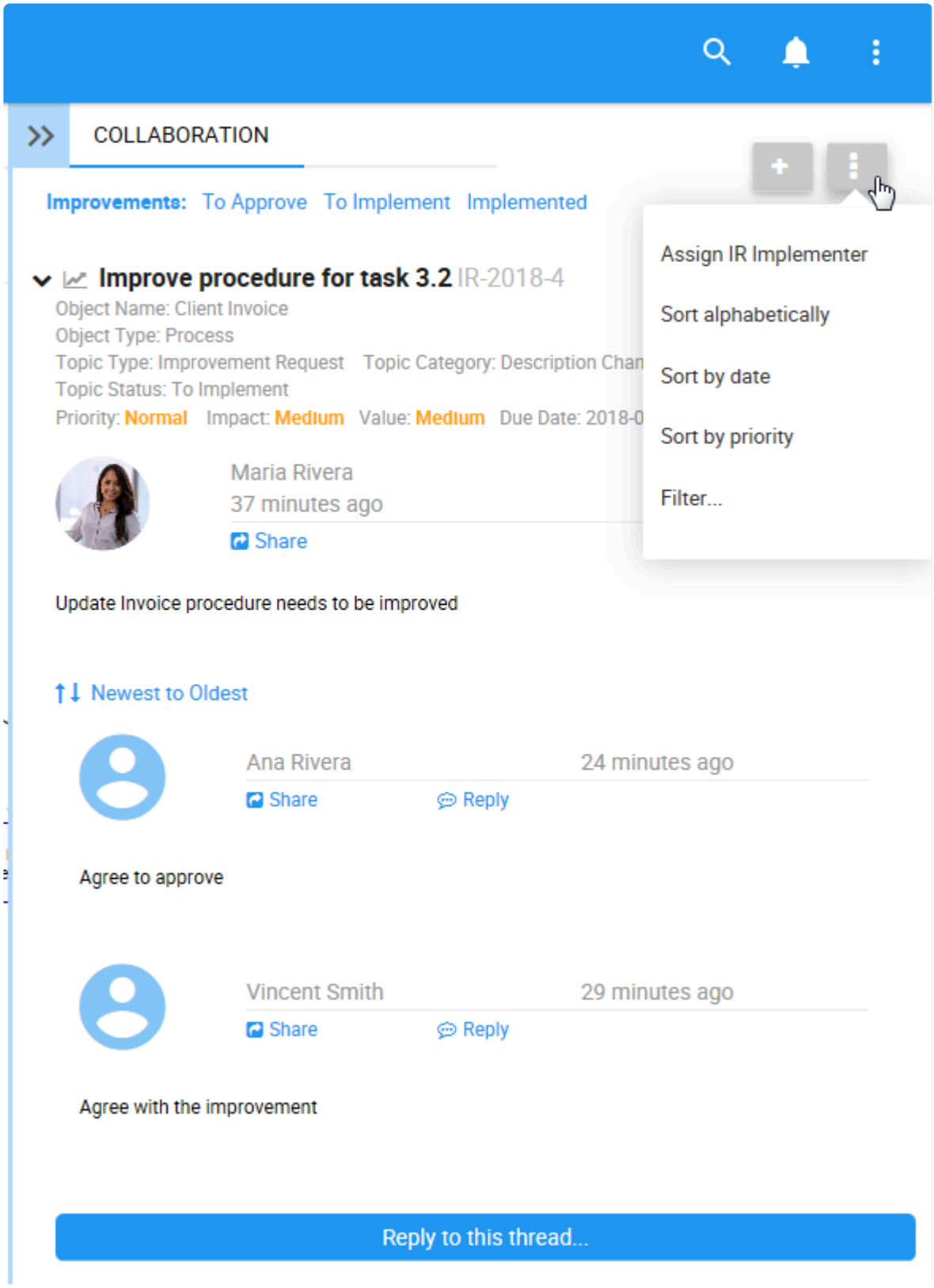
1. Navigate to the Improvement Request



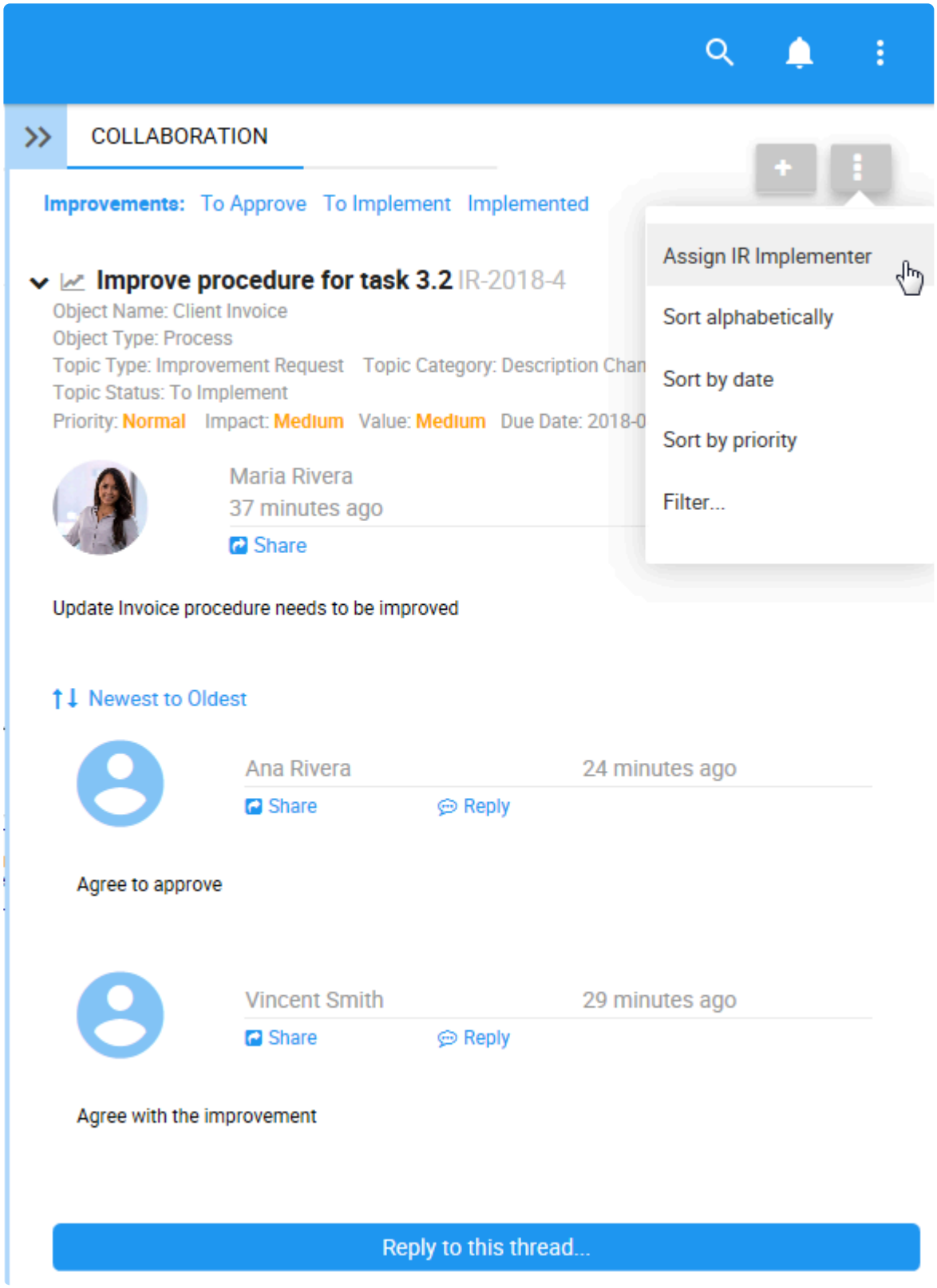
2. Click on the box



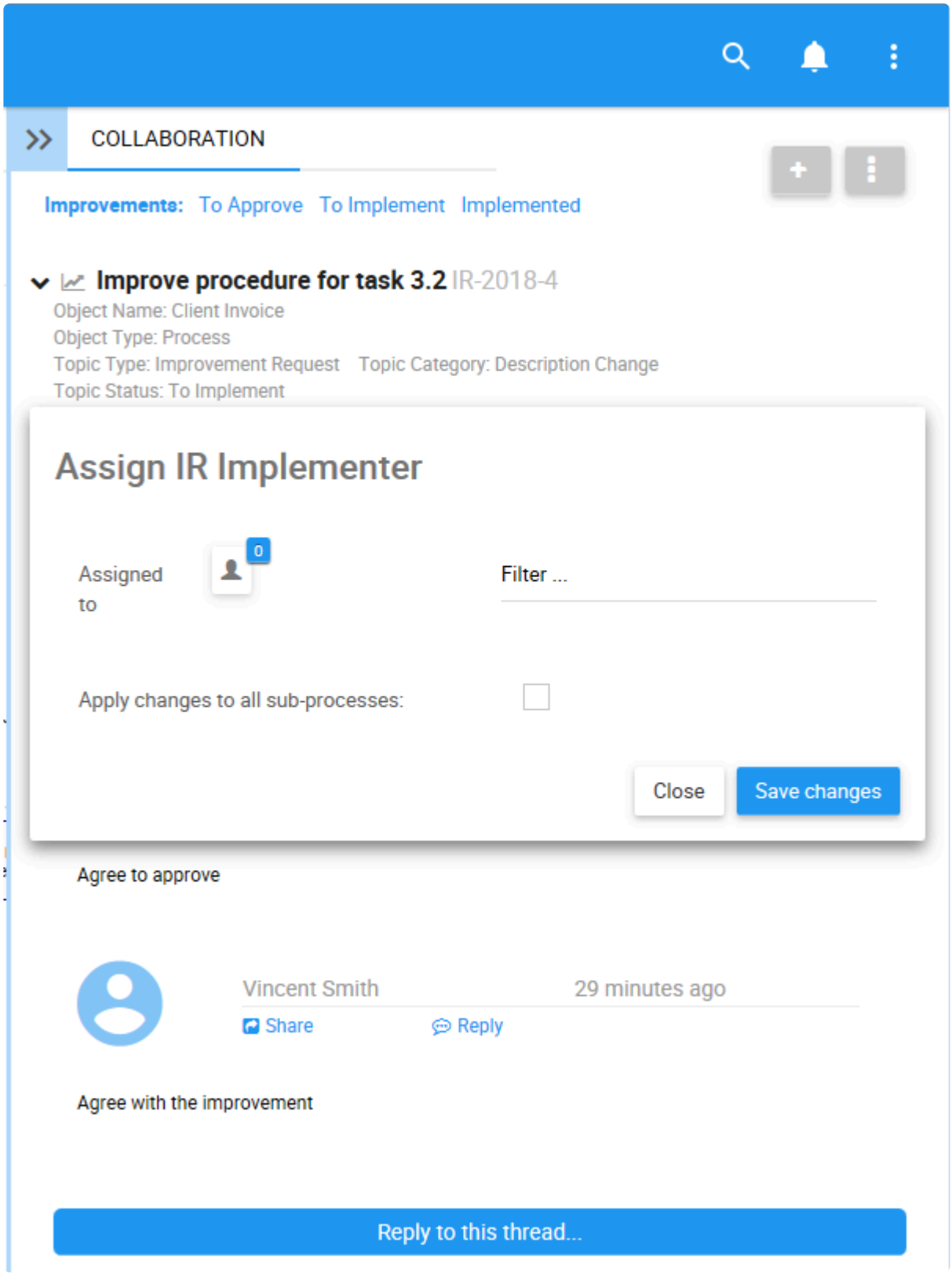
3. A drop-down list will be generated



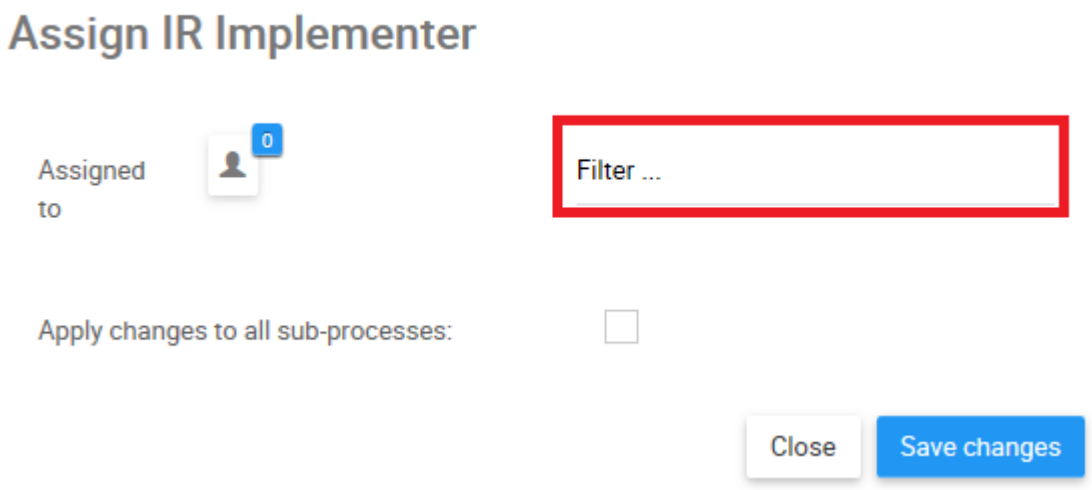
4. Click on the “Assign IR Implementer” box



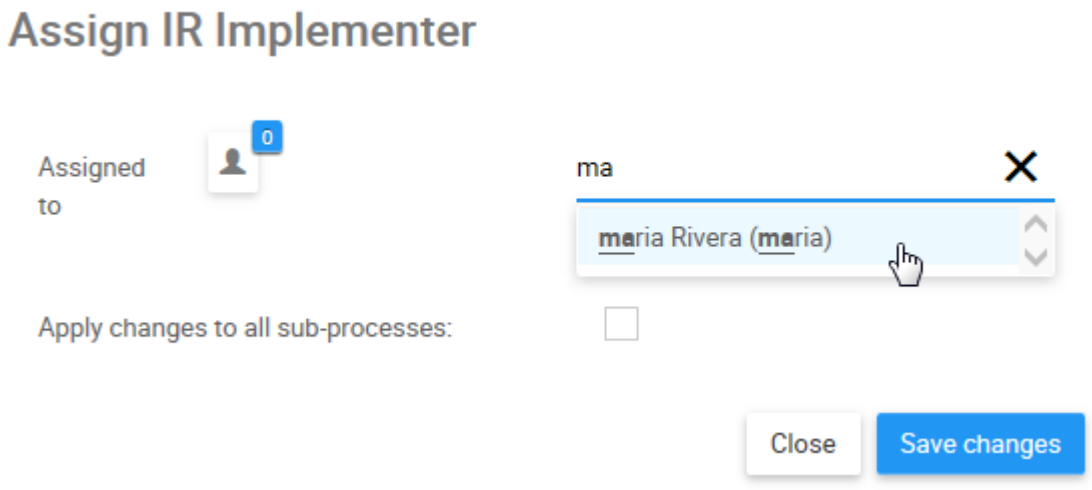
5. A new window will be generated where you can assign the IR implementer



6. Navigate to the “Assign to” box

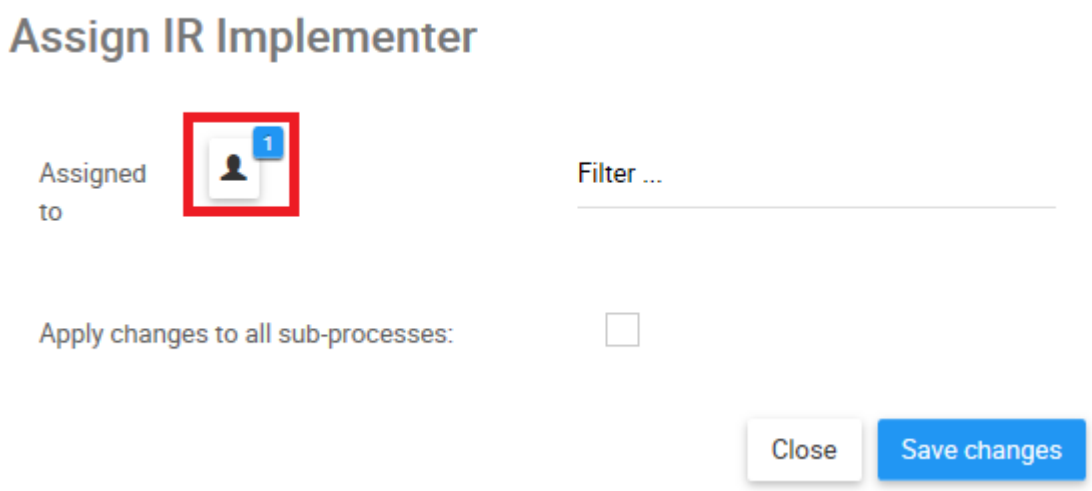


7. Type the user name of the Web Modeler implementer and click on the user name

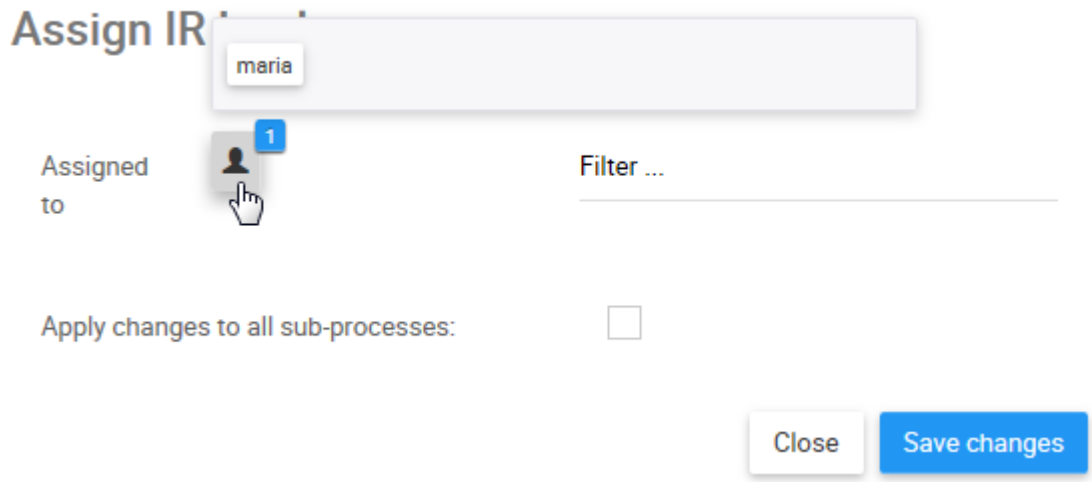


The list of suggestions will populate based on key word typing

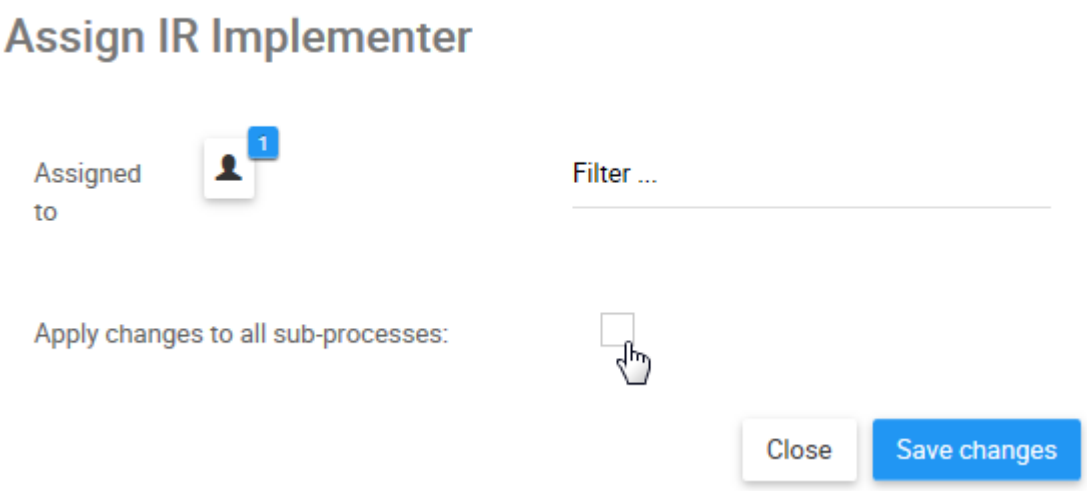
8. The user will be assigned

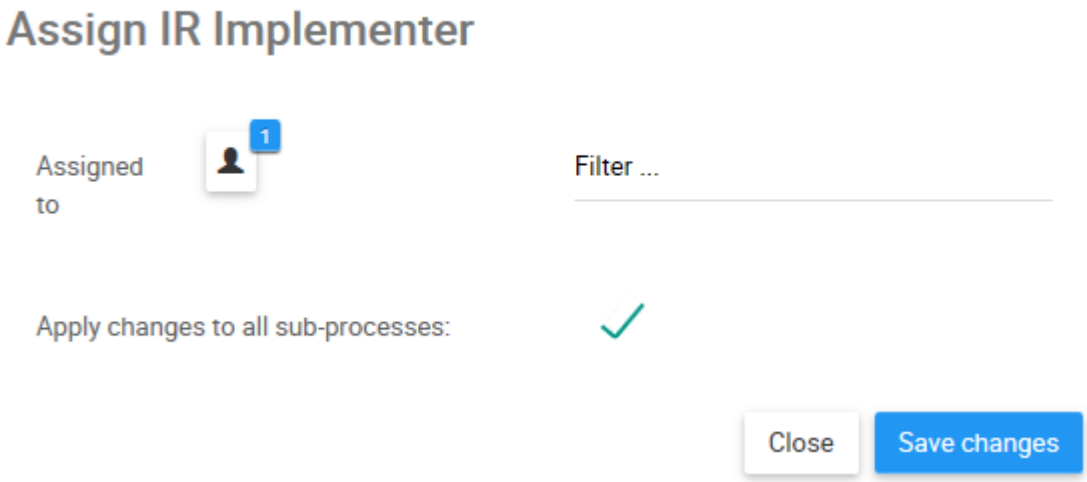


9. Click on the box, and the user name of the implementer will appear



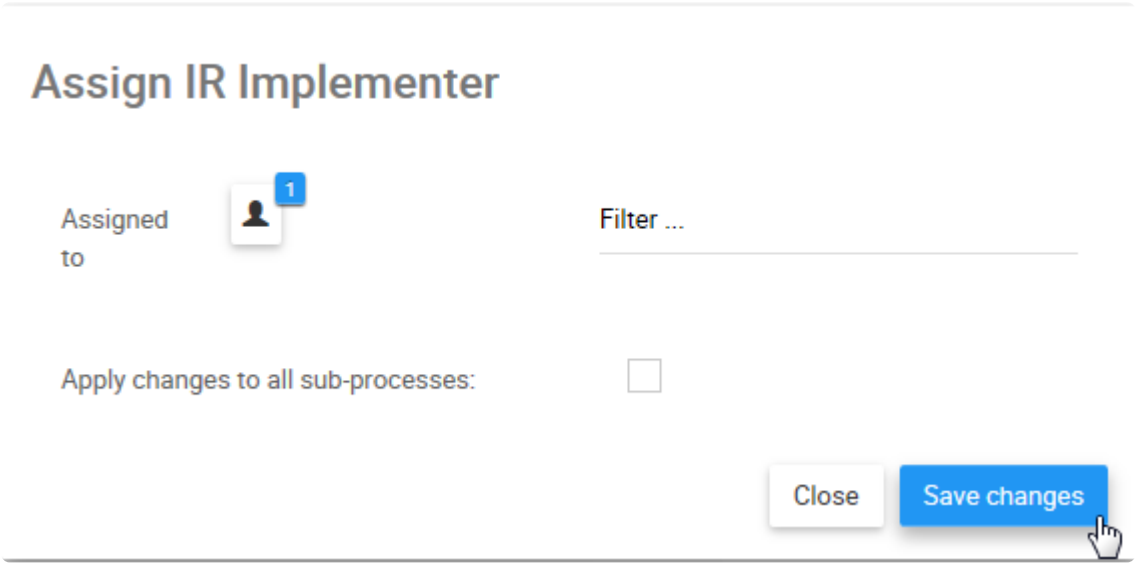
10. If you wish to apply changes to sub-processes, check the box



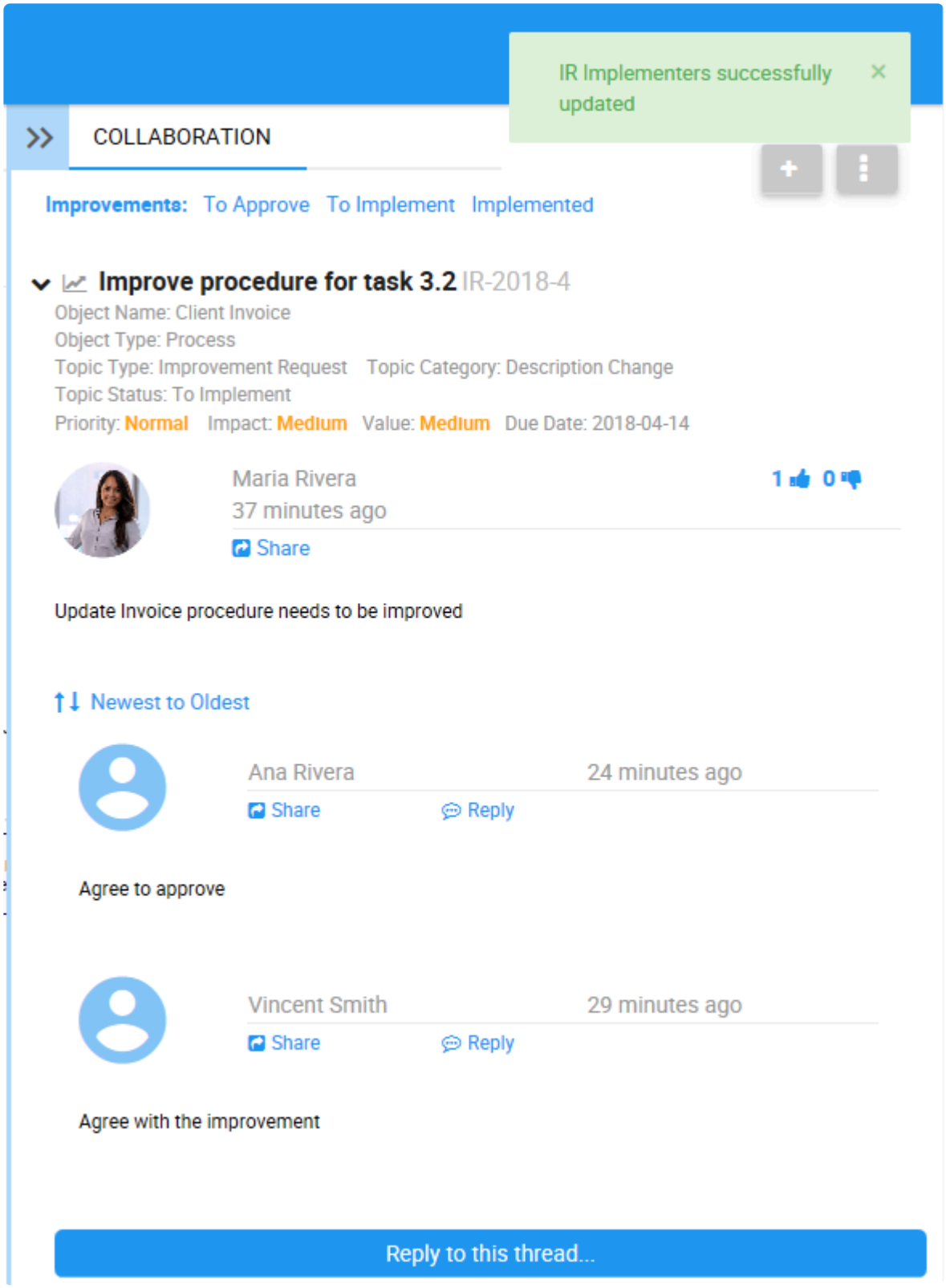


This option is **only** available if the improvement request was created on a process

11. Navigate to the Save changes box



12. You will receive a notification when the IR implementer was updated



Important things to Note

Roles/resources that are Accountable on an object's parent are set as implementers by default on flow objects with no implementers. Note that they don't have to be assigned as Accountable on the objects for this to follow.

! Once an implementer is set on a flow object, the application will override the parent implementer and remove him/her as implementer automatically.

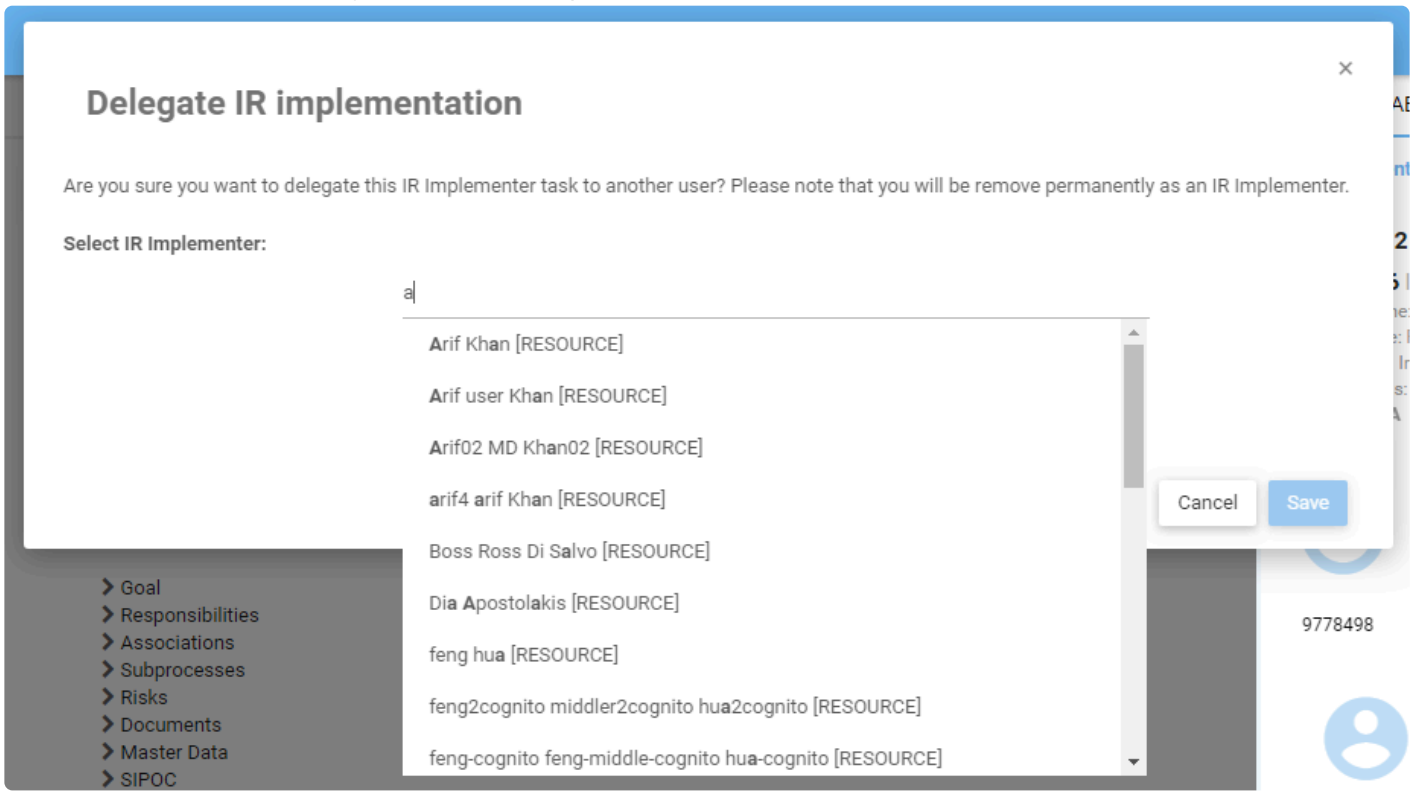
4.12.6.2.1 Delegating Collaboration Request

The delegate feature in collaboration allows the implementer to reassign their responsibility to another user.

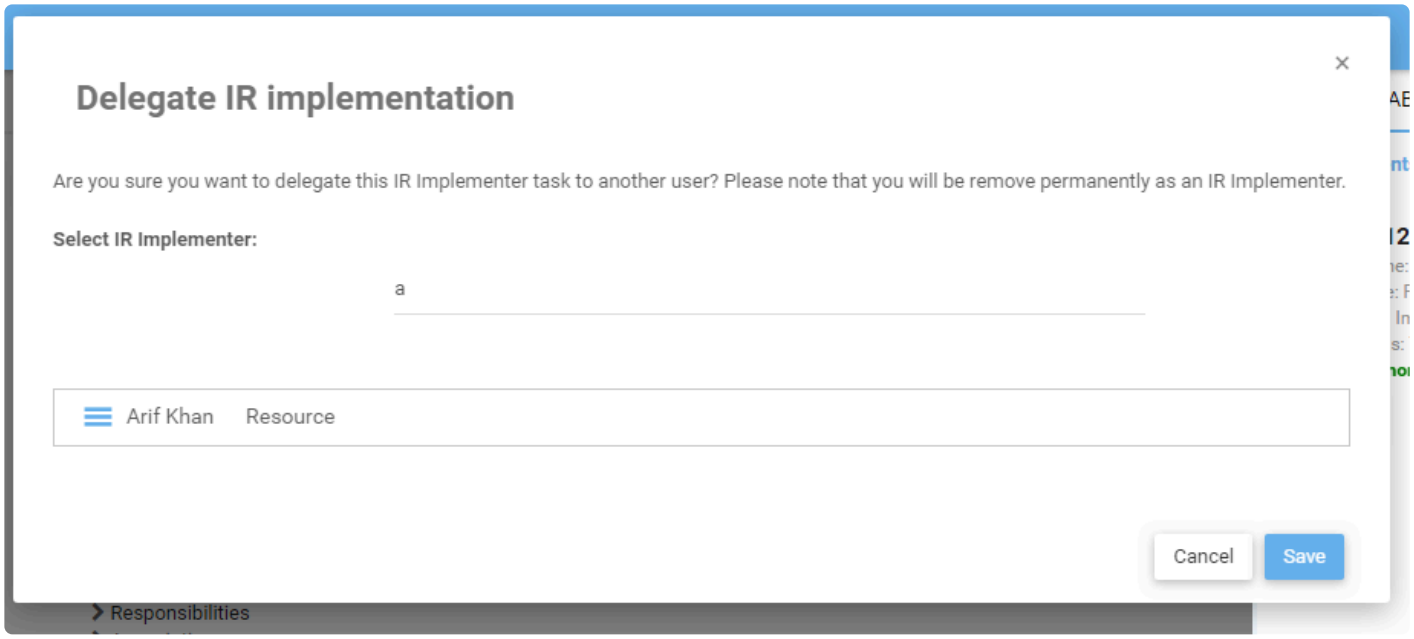
1. Navigate to a post that you are assigned as an implementer

2. Click on the Delegate button

3. Search for the resource you want to delegate



4. Select the resource you want to delegate to



5. After you click

the delegated implementer will become the new implementer.

Rules

2.1 Collaboration

- The implementer will see a “Delegate” option button in the collaboration tab of a specific improvements on all modules (except for Collaboration and Governance modules).
- The user can then assign a resource other than himself. If a selected resource is already assigned a message will inform the user.

2.2 Home page

- When the delegated IR implementer visits his home page, his delegated tasks should appear under his/her My Action and My Pending Action widget.
- When the user has delegated his tasks to another user, his delegated tasks should not appear under his/her My Action and My Pending Action widget.

2.3 Notification

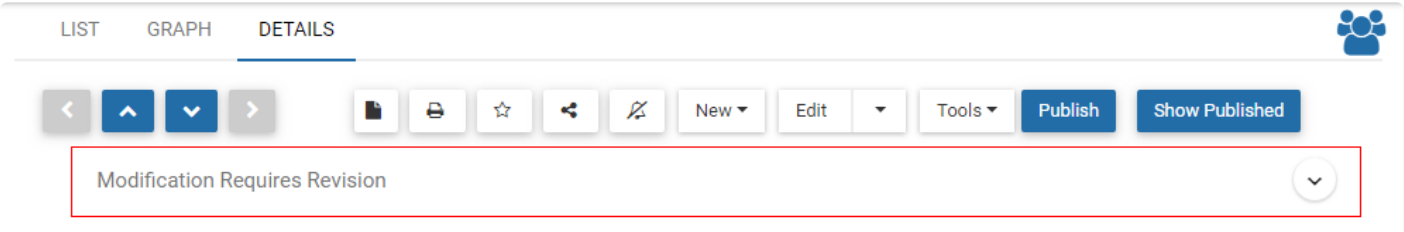
- When a user has been delegated as an IR implementer, he/she should receive notifications for their new tasks.
- When a user has delegated his task of an IR implementer, he/she should not receive notifications for their new tasks.

4.12.6.3 Close Improvement Request

At any point in time, Improvement Requests can be closed by users who are assigned as A (Accountable), Administrators and the creator of the IR.

4.12.6.4 New Revision Update to Review

IR implementers have now a way to be notified when a process to which they are assigned switches from a Published version to a Draft version. They will see a “New Revision Update to Review” box on the page of the object, which allows them to confirm that they have seen the change.



The box will appear if:

1. The user must be an IR Implementer on the object.
2. The object must change from a Published status to a Draft (In progress) status
3. The change must be done by a user that is not IR Implementer on the object.

4.13 Governance

Governance and oversight is a crucial factor in Business Process Management and Business Process Optimization. Governance provides individuals with the ability to oversee processes, analyze and assess their effectiveness at their current state, while planning for improvements in the future. This in mind, the EPC Governance Module is divided into 3 tabs:

1. Overview
2. Maturity
3. Analysis

The EPC Governance Module provides users with a management space where processes can be tracked, optimized and improved. Notable features within this module include:

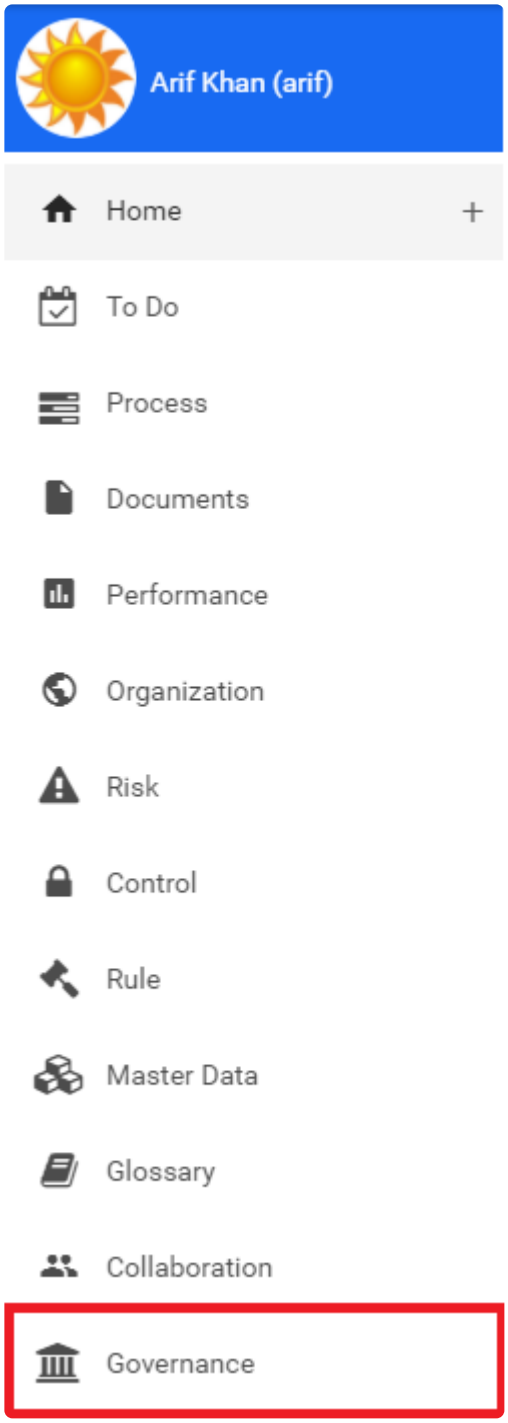
1. View Review Cycles (Overview Tab)
2. Process Maturity Analysis (Maturity Tab)
3. View Critical Path (Analysis Tab)
4. View High Risk Path (Analysis Tab)
5. Differentiate Value Added and Non-Value Added Activities (Analysis Tab)
6. Identify Process Waste and Waste Type (Analysis Tab)
7. Identify Number of Operators in a Process (Analysis Tab)
8. View Process Cost Figures (Analysis Tab)
9. View Processing, Waiting, Inventory, Transport and Changeover Times (Analysis Tab)

Using this information, users can Generate Process Analysis Workbooks, featuring key information about their selected processes.

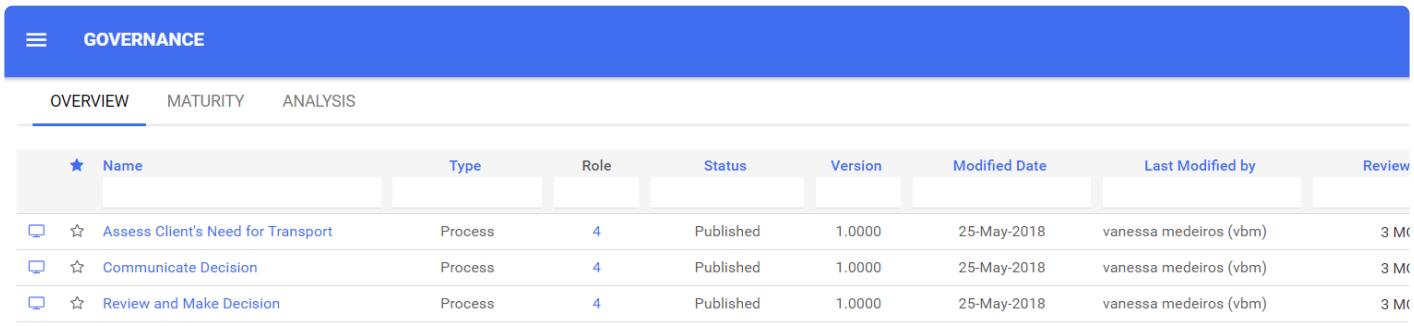
To reach the Governance Tab:

1) Select the Menu Icon

2) Click on Governance



3) View Governance Module



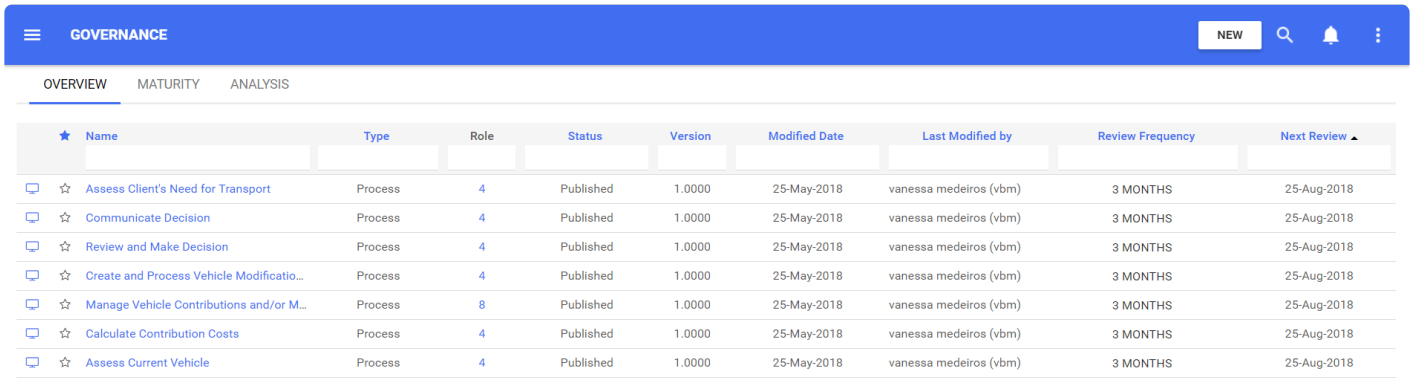
Name	Type	Role	Status	Version	Modified Date	Last Modified by	Review
Assess Client's Need for Transport	Process	4	Published	1.0000	25-May-2018	vanessa medeiros (vbm)	3 M(
Communicate Decision	Process	4	Published	1.0000	25-May-2018	vanessa medeiros (vbm)	3 M(
Review and Make Decision	Process	4	Published	1.0000	25-May-2018	vanessa medeiros (vbm)	3 M(

4.13.1 Overview

Users can view Governance information in List Mode within the Overview Tab. Users can Sort and Filter through the information in order to find their desired process.

Users can view the following information:

1. Name
2. Type
3. Role
4. Status
5. Version
6. Modified Date
7. Last Modified by
8. Review Frequency
9. Next Review

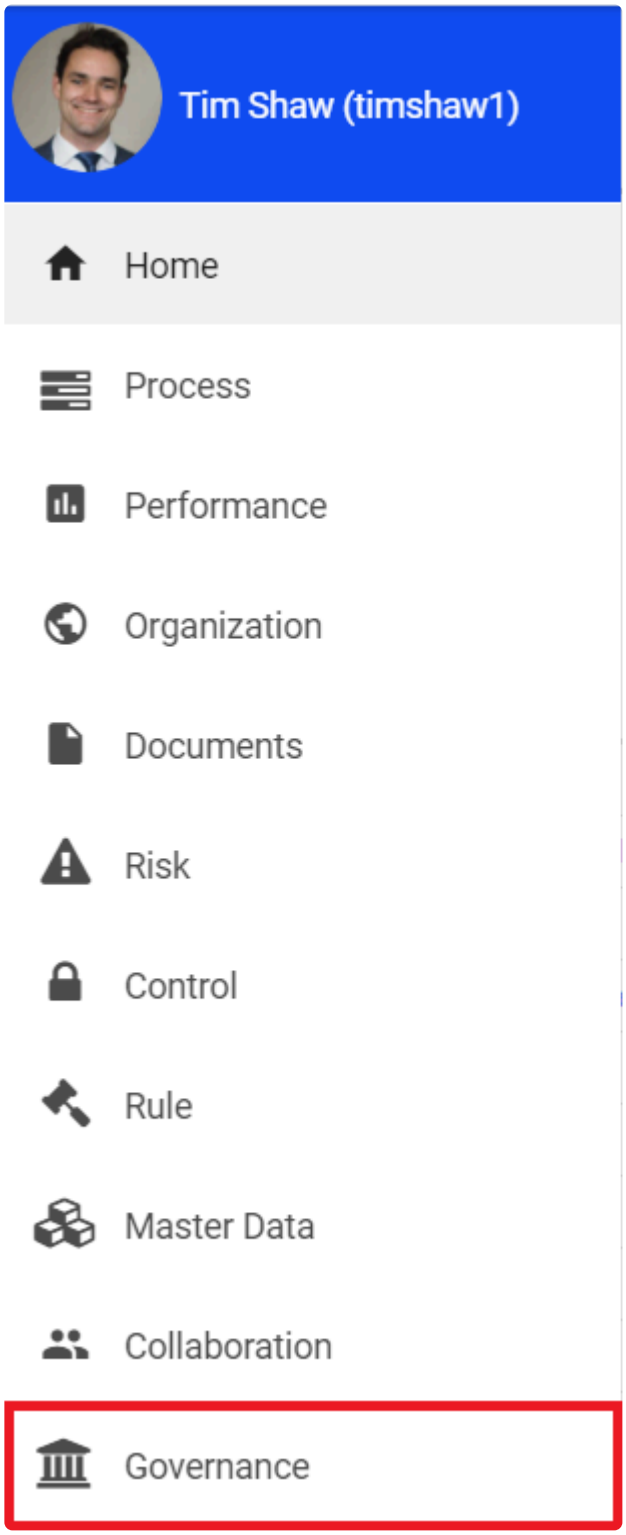


Name	Type	Role	Status	Version	Modified Date	Last Modified by	Review Frequency	Next Review
Assess Client's Need for Transport	Process	4	Published	1.0000	25-May-2018	vanessa medeiros (vbm)	3 MONTHS	25-Aug-2018
Communicate Decision	Process	4	Published	1.0000	25-May-2018	vanessa medeiros (vbm)	3 MONTHS	25-Aug-2018
Review and Make Decision	Process	4	Published	1.0000	25-May-2018	vanessa medeiros (vbm)	3 MONTHS	25-Aug-2018
Create and Process Vehicle Modificatio...	Process	4	Published	1.0000	25-May-2018	vanessa medeiros (vbm)	3 MONTHS	25-Aug-2018
Manage Vehicle Contributions and/or M...	Process	8	Published	1.0000	25-May-2018	vanessa medeiros (vbm)	3 MONTHS	25-Aug-2018
Calculate Contribution Costs	Process	4	Published	1.0000	25-May-2018	vanessa medeiros (vbm)	3 MONTHS	25-Aug-2018
Assess Current Vehicle	Process	4	Published	1.0000	25-May-2018	vanessa medeiros (vbm)	3 MONTHS	25-Aug-2018

To navigate to the Governance Overview Tab:

1) Click on the menu icon

2) Click on the Governance Tab


Tim Shaw (timshaw1)
Home
Process
Performance
Organization
Documents
Risk
Control
Rule
Master Data
Collaboration
Governance

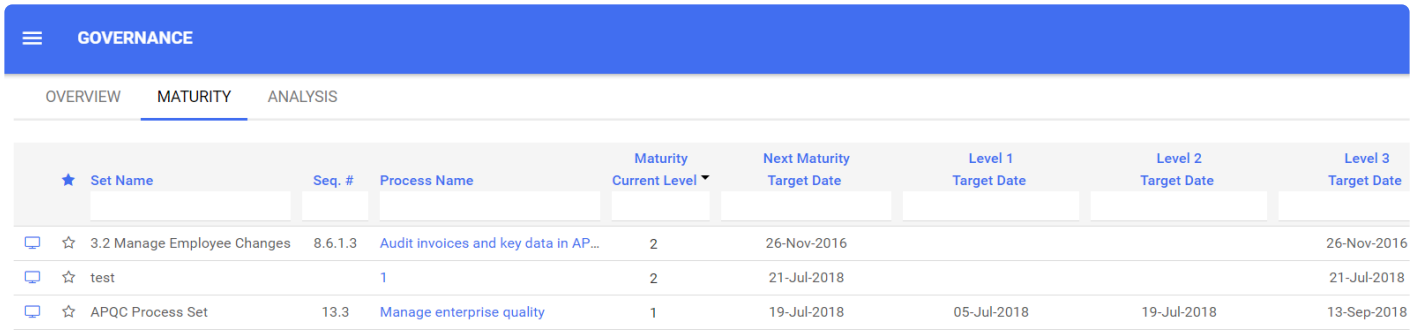
4.13.2 Maturity

Users can view process maturity information within the Governance Maturity Tab. Process Maturity information reflects the current states of a business process, as well as the planned improvements scheduled by the organization.

Users can view the following information in List view mode:

1. Set Name
2. Sequence Number
3. Process Name
4. Current Maturity Level
5. Next Maturity Target Date
6. Target Dates (Level 1, Level 2, Level 3, Level 4, Level 5)

Users can additionally Sort and Filter through the tab to find the process they are looking for.

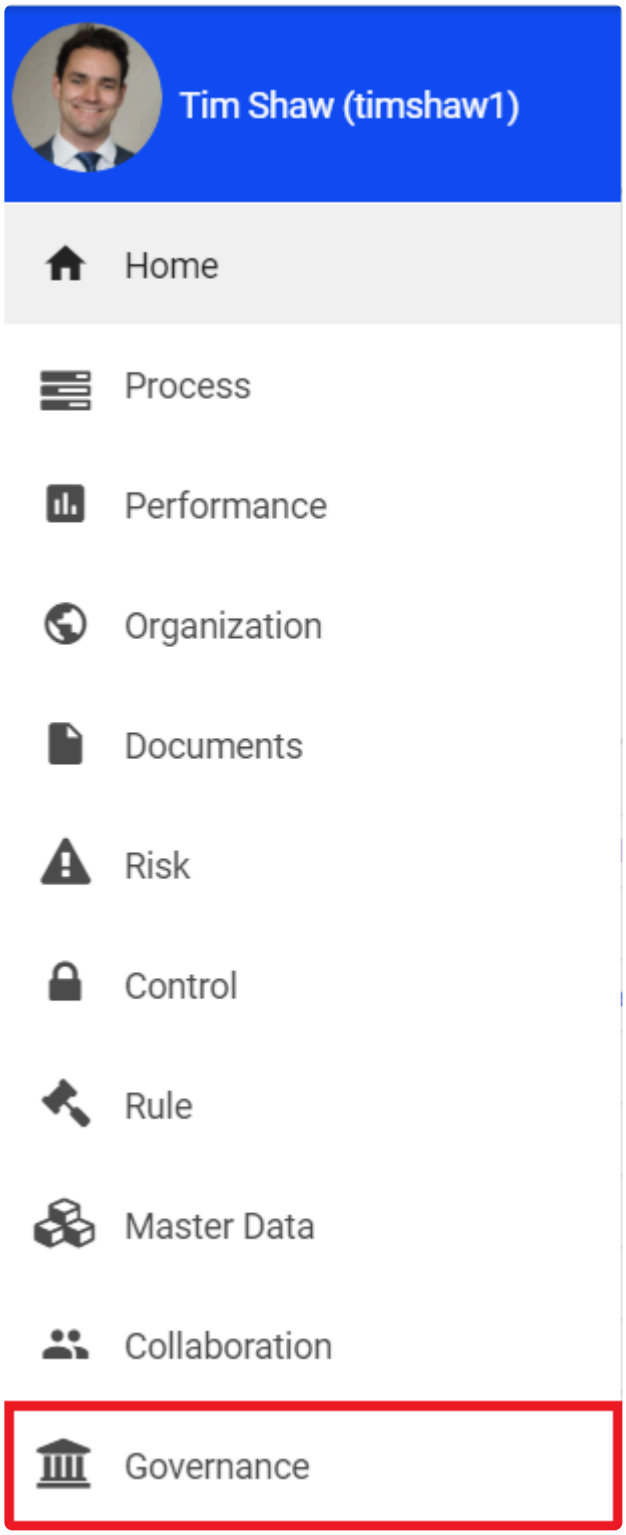


Set Name	Seq. #	Process Name	Maturity Current Level	Next Maturity Target Date	Level 1 Target Date	Level 2 Target Date	Level 3 Target Date
3.2 Manage Employee Changes	8.6.1.3	Audit invoices and key data in AP...	2	26-Nov-2016			26-Nov-2016
test		1	2	21-Jul-2018			21-Jul-2018
APQC Process Set	13.3	Manage enterprise quality	1	19-Jul-2018	05-Jul-2018	19-Jul-2018	13-Sep-2018

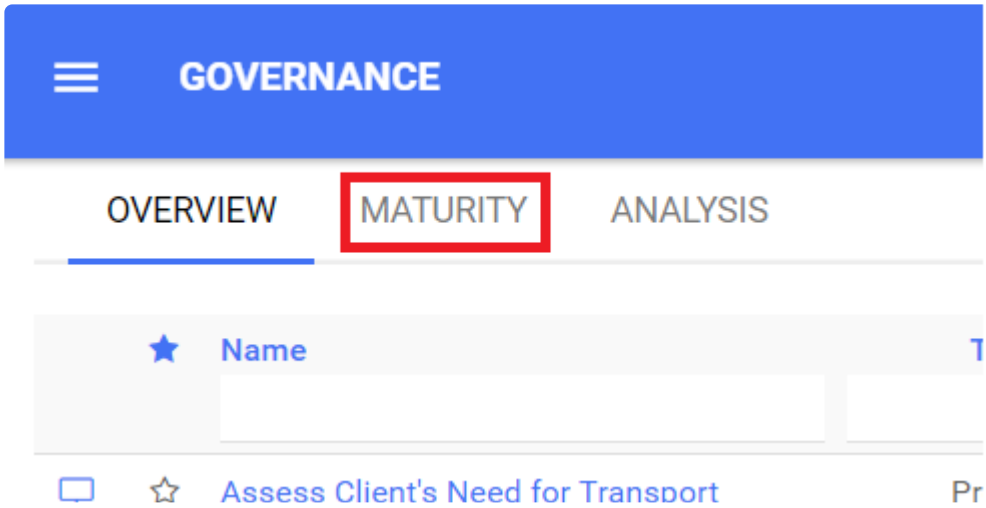
To navigate to the Governance Maturity Tab:

1) Select the Menu Icon

2) Select on the Governance Module



3) Select the Maturity Tab


GOVERNANCE
OVERVIEW
MATURITY
ANALYSIS
Name
T
Assess Client's Need for Transport
Pr

4.13.3 Analysis

The Analysis tab allows users to view critical process information, facilitating understanding, decision making, and process optimization.

Users can view process information in

- List Mode
- Process Analysis Workbooks

Users can view the following information in List mode:

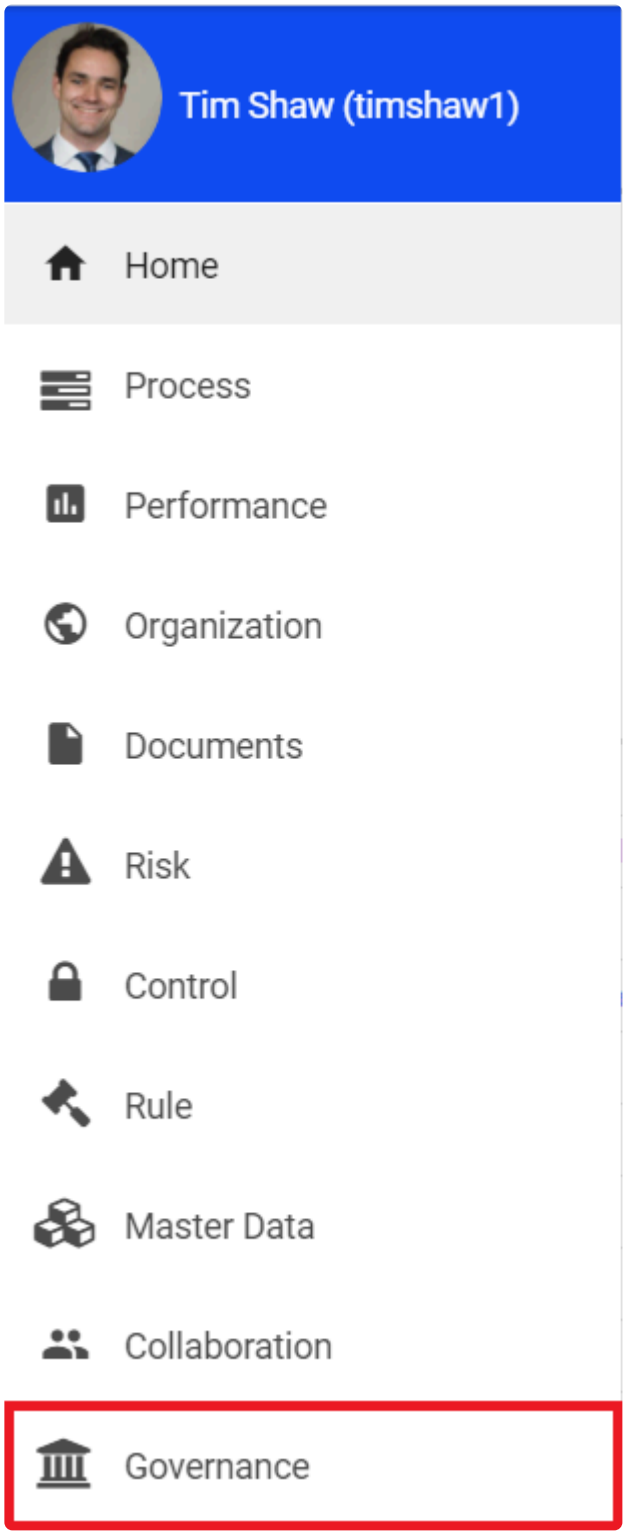
1. Sequence # (of parent)
2. Parent Name
3. Sequence # (of process or flow object)
4. Name (of process or flow object)
5. Type
6. Path
7. Value Type
8. Waste Type
9. Number of Operators
10. Number of Executions
11. Actual Cost
12. Processing Time, Waiting Time, Inventory Time, Transport Time, Change Over Time

Users can Sort or Filter through the List format to find the desired item.

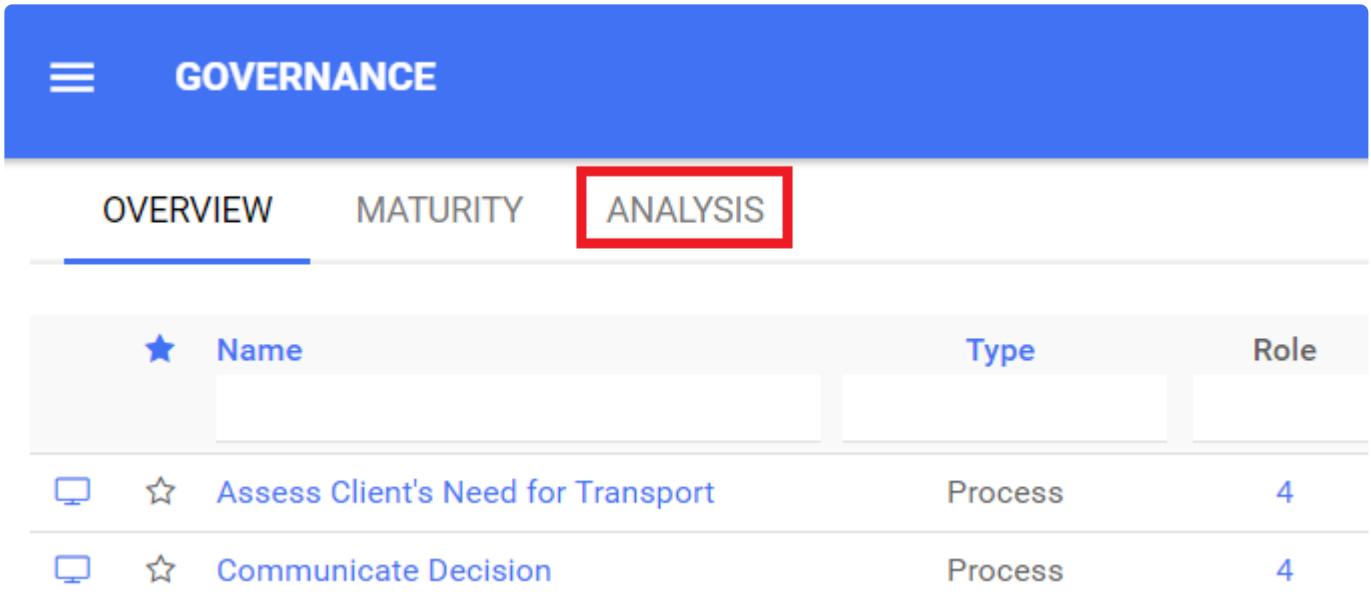
To navigate to the Analysis tab:

1) Select the Menu icon

2) Select the Governance Tab



3) Select the Analysis Tab

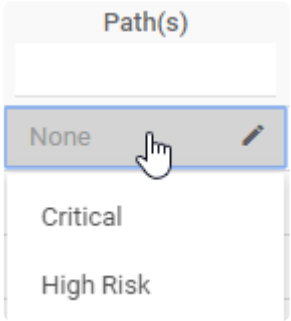

GOVERNANCE
OVERVIEW
MATURITY
ANALYSIS
Name
Type
Role
Assess Client's Need for Transport
Process
4
Communicate Decision
Process
4

4.13.3.1 Process Analysis Workbooks

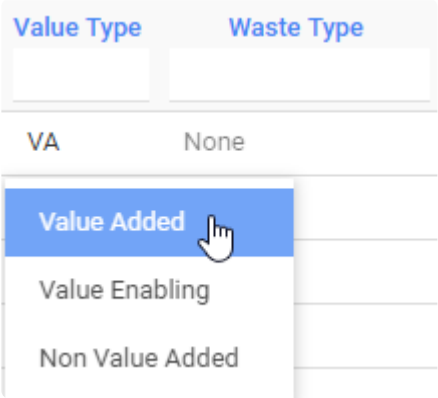
To be able to understand current process status and to continuously progress, it is important to know in depth the processes and the objects directly connected to them.
From the Analysis Tab, you can generate Process Analysis Workbooks for each object's parent in EPC. This Workbook in an Excel sheet that regroups the information added in the Analysis Tab, according to the chosen path (or paths): Critical and High Risk.

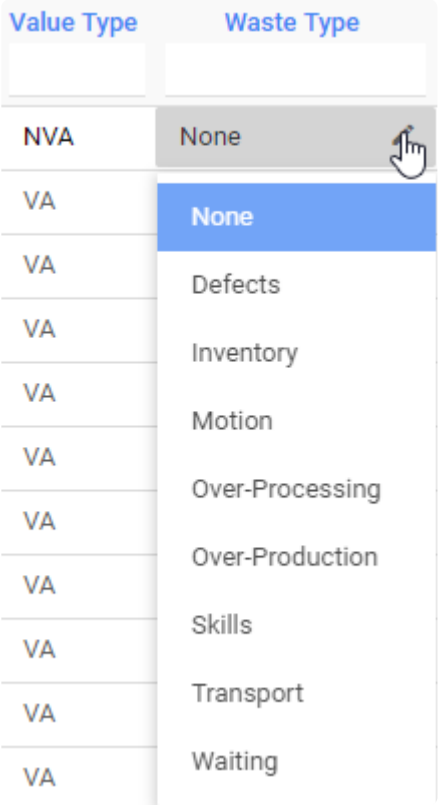
This tab allows process owners, or users responsible for specific objects within EPC, to add real-time data to the objects and facilitates process analysis overall.
Within this tab, many elements can be edited, that will be taken into consideration in the Workbooks:

1. The path(s) on which the object is



2. The value type and the Waste type associated to the object





3. The average number of operators and of executions needed for the object

# Operators	# Executions
0	1

4. Average times for specific situations

Processing	Waiting	Inventory	Transport	Change Over
0 00:00:00	0 00:00:00	0 00:00:00	0 00:00:00	0 00:00:00

5. Costs

Actual Cost
0.00

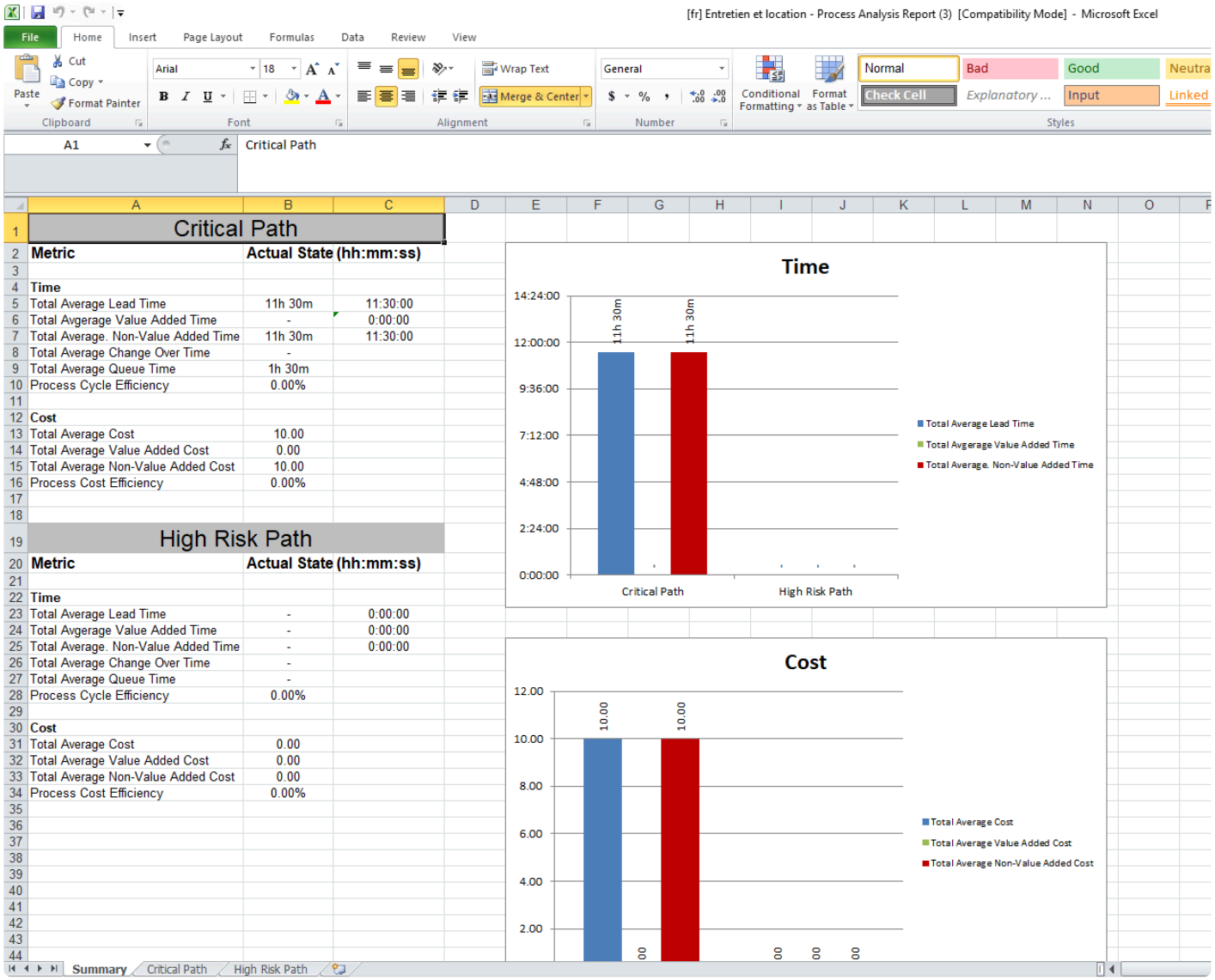
With all of this information added to objects, the Process Analysis Workbook corresponding to the parent will integrate all the values of all objects and generate tables and charts with these values.

For example, by selecting the following values for a task, the workbook will integrate them:

Type	Path(s)	Value Type	Waste Type	# Operators	# Executions	Actual Cost	Processing	Waiting	Inventory
Task	Critical	NVA	None	0	1	10.00	0 10:00:00	0 00:30:00	0 01:00:00

To generate the Workbook, you need to:

1. Click on the icon
2. Click on the downloaded Excel sheet
3. Click on “Enable Editing” when the Excel opens



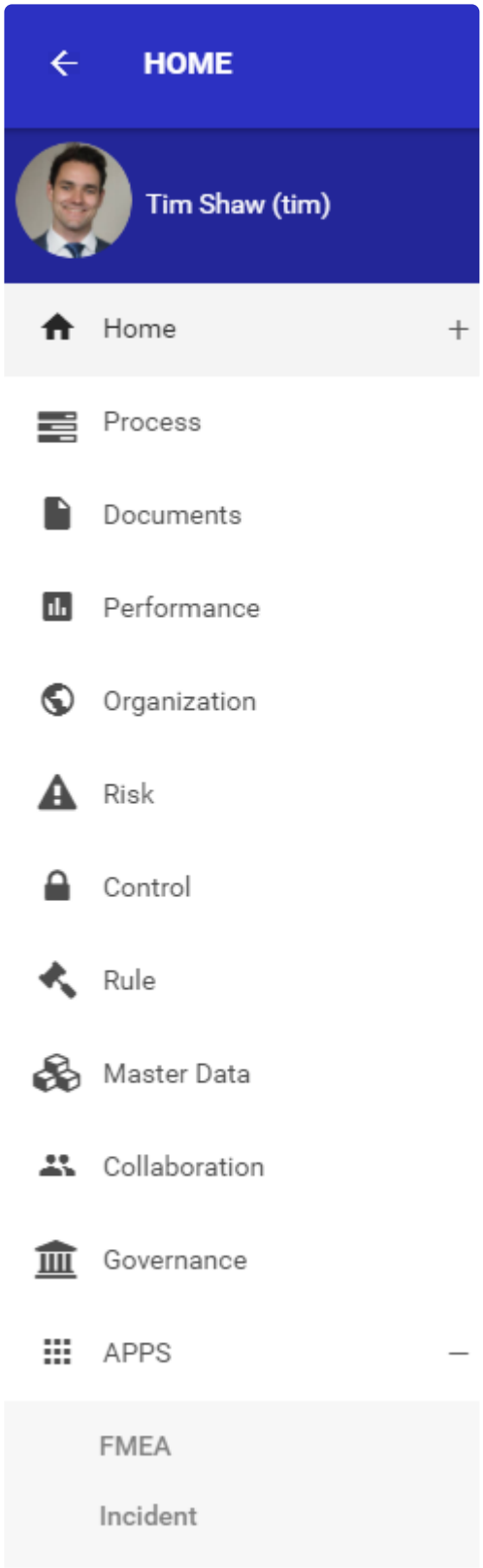
The values will be associated in the table of the chosen path(s). In this case, the values are associated to the Critical Path, and the Total Average Lead Time corresponds to the sum of all times that were added in the Analysis Tab, in this case: 10h + 30 mins + 1h =11h 30mins.

The same value is also displayed in the Total Average Non-Value Added Time section, since we previously selected “Non-Value Added” or “NVA” for the Value Type of the object. So all times related to the object are necessarily NVA.

4.14 Apps Menu

System Administrators may add external links to websites or applications directly within your navigation menu.This allows you to easily access any Workflow or Automation applications by having them integrated in the EPC.

You can view these links to applications here:



To integrate external links and applications, please contact your system administrators.

4.15 Glossary

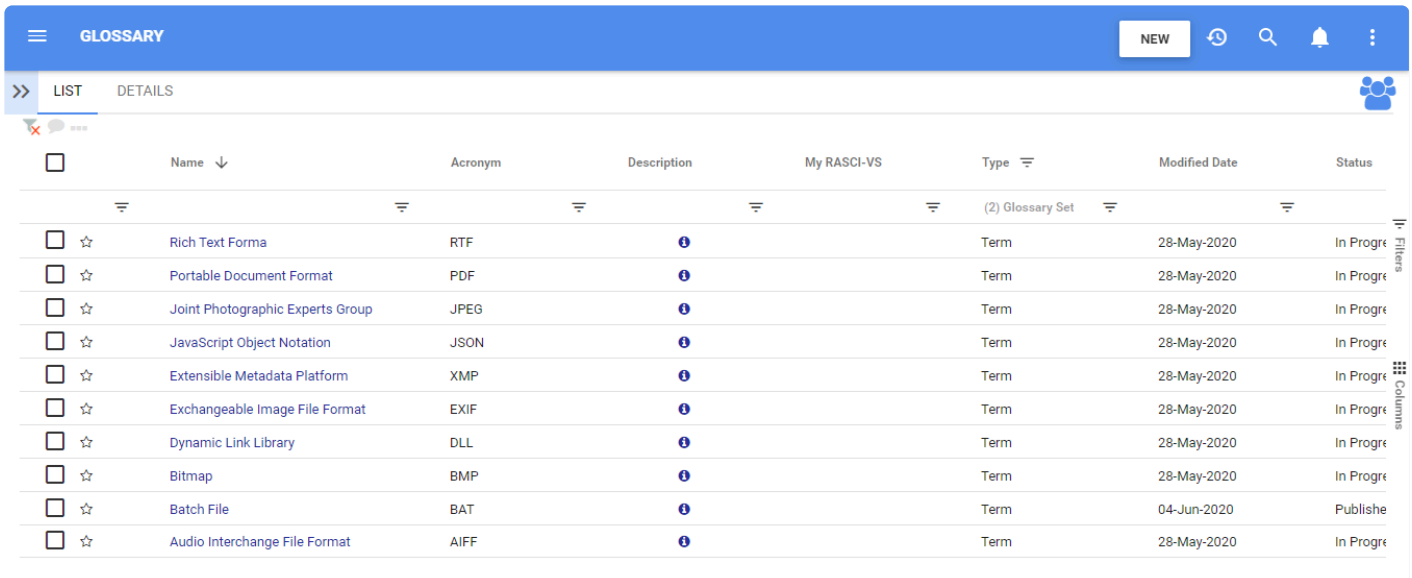
The Glossary Module is a terminology module for an organization's entire EPC server. Its purpose is to allow organizations to set company-wide definitions or acronyms to simplify end-user understanding. Similar to a dictionary, this module gathers a company's most used words and acronyms to set a vocabulary standard to avoid confusion and misunderstandings.

This module will sync with the link-to-glossary feature; for more details, please visit the link-to-text instructions and applications here.

Like any other module, the Glossary will allow users to navigate between list view and details view, including their respective features available in each tab; however, there will not be any mapping in this module.

4.15.1 Overview

The EPC allows users to view and monitor business terms that describe business processes. Business terms are used to centralize definitions and acronyms for organizations to build a structure that allows businesses to operate on a daily basis in a cooperative manner, free of misunderstanding.



4.15.2 List

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

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

List	Description
1. No hierarchy filter	A list view where **all** items within the given module are listed
2. Current level & below	A list view where **all levels below** the selected item are listed
3. Current level	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
Risk	Whether or not there are Risks directly associated with the item in question
Subtype	Whether or not if this object is classified as a business type
Categories	Whether or not there are Categories directly associated with the item in question
Identifier	Textual search for any existing unique identifier of an object
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
Last Modified By	The name of the last resource that modified the object
Status	View the status of the item in question when Show Latest mode is on
Locked	Whether the item in question is currently locked or not

© 2020 Interfacing Technologies Corporation

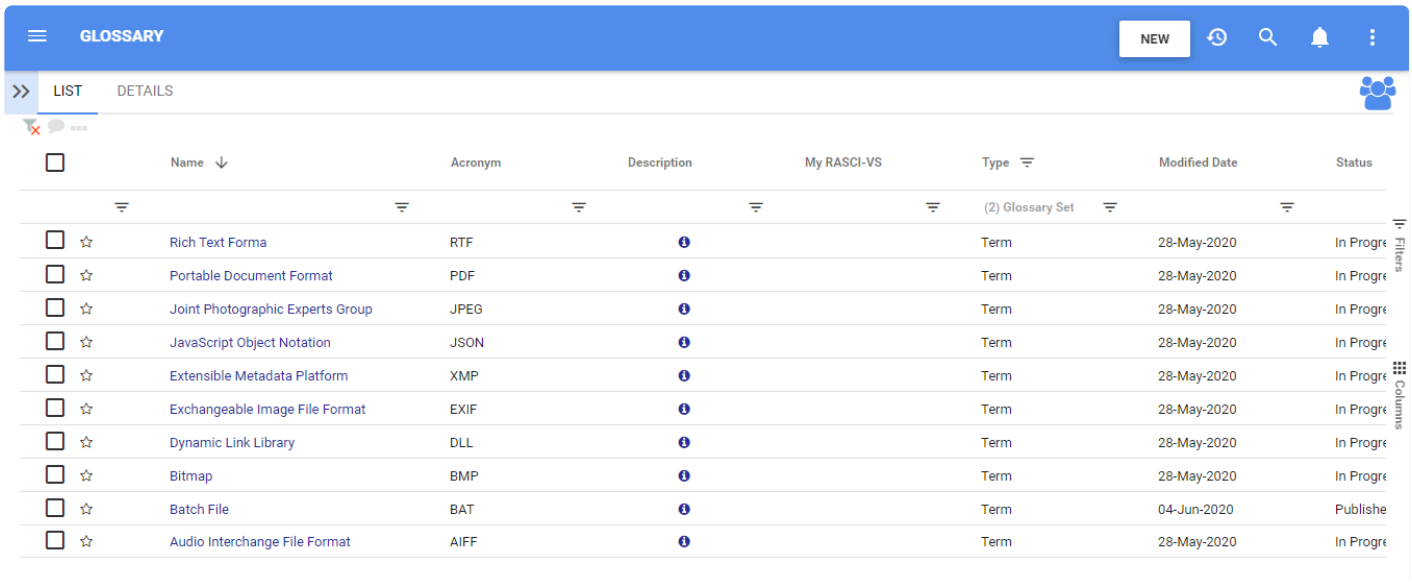
The selected list view will be saved both by web browser and by user.

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 **Glossary**

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

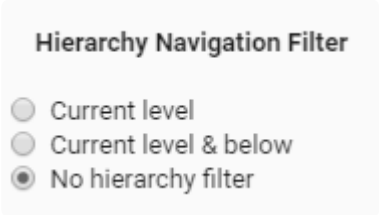


To simplify Term viewing; users **are not** greeted with all major terms that they are associated too. Users are greeted with the list of term Sets, the highest level of term Classification in the EPC. However users can display these risks within the **List View**. Please see the **Optional** steps below:

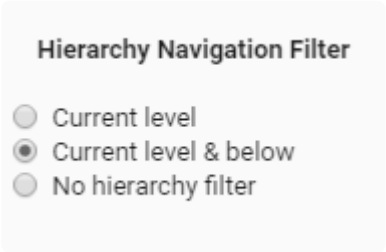
These steps are only required if a user is using an account or browser for the first time. As noted above, list preferences will be saved by user and browser to simplify navigation.

4. **(Optional)** To view sub-processes, users must select the filter panel and then select “Current level & below of the EPC Web App.

5. **(Optional)** Click on the filter setting and it will generate a list view



6. **(Optional)** Select “Current level & below”



7. **(Optional)** Upon selecting the “Current level & below”, the EPC will automatically refresh the page

4.15.2.1 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

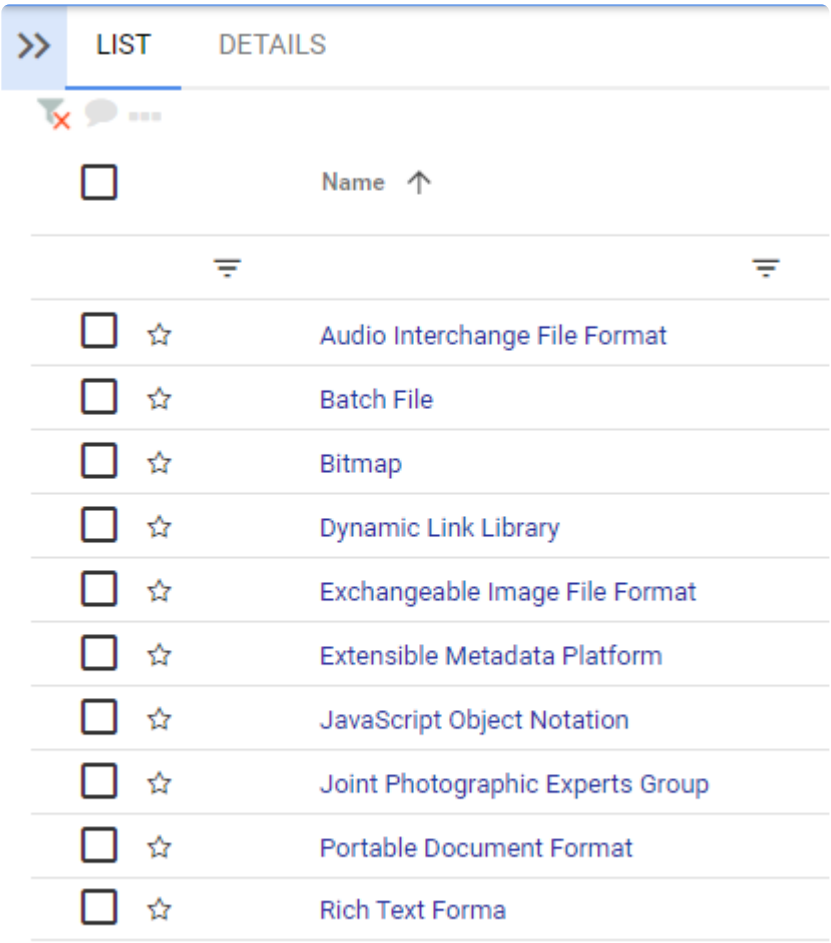
1. Navigate to the Rule Module

2. Navigate Cursor to desired **Category**

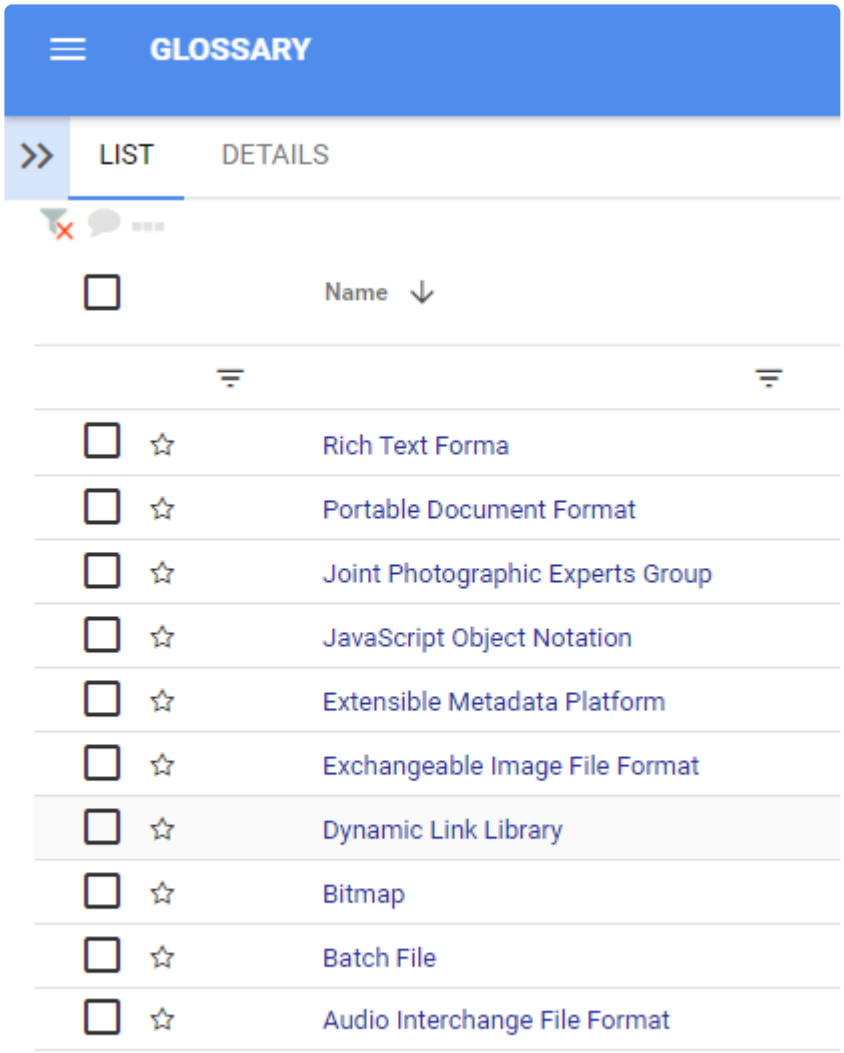
3. Click on the **Category**

1-To sort the Category in Ascending order, click on ▲
2-To sort the Category in Descending order, click on ▼
3- Click a third time to Remove the sorting action

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



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


GLOSSARY
LIST
DETAILS
Name
Rich Text Forma
Portable Document Format
Joint Photographic Experts Group
JavaScript Object Notation
Extensible Metadata Platform
Exchangeable Image File Format
Dynamic Link Library
Bitmap
Batch File
Audio Interchange File Format

4.15.2.2 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 Term 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
Risk	Empty – The object has no associated risk Not-Empty – The object has at least one associated risk
Rule	Empty – The object has no associated rule Not-Empty – The object has at least one associated rule
Subtype	Empty – The object does not have a business type associated Not-Empty – The object has at least one business type associated
Categories	Empty – The object has no category associated Not-Empty – The object has at least one associated category
Identifier	Empty – The object does not have a unique identifier Not-Empty – The object has a unique identifier
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	Term Set Term Folder Term
Modified Date	The specific dates that things have been modified by

Last Modify By	Textual search of last resource who last modified an object
Status	Shows the status of the item in question (published vs in-progress) Sent for Review Approved Rejected Under Revision Revised
Locked	False – The object isn't locked True – The object is locked

The Filtering section will cover the following:

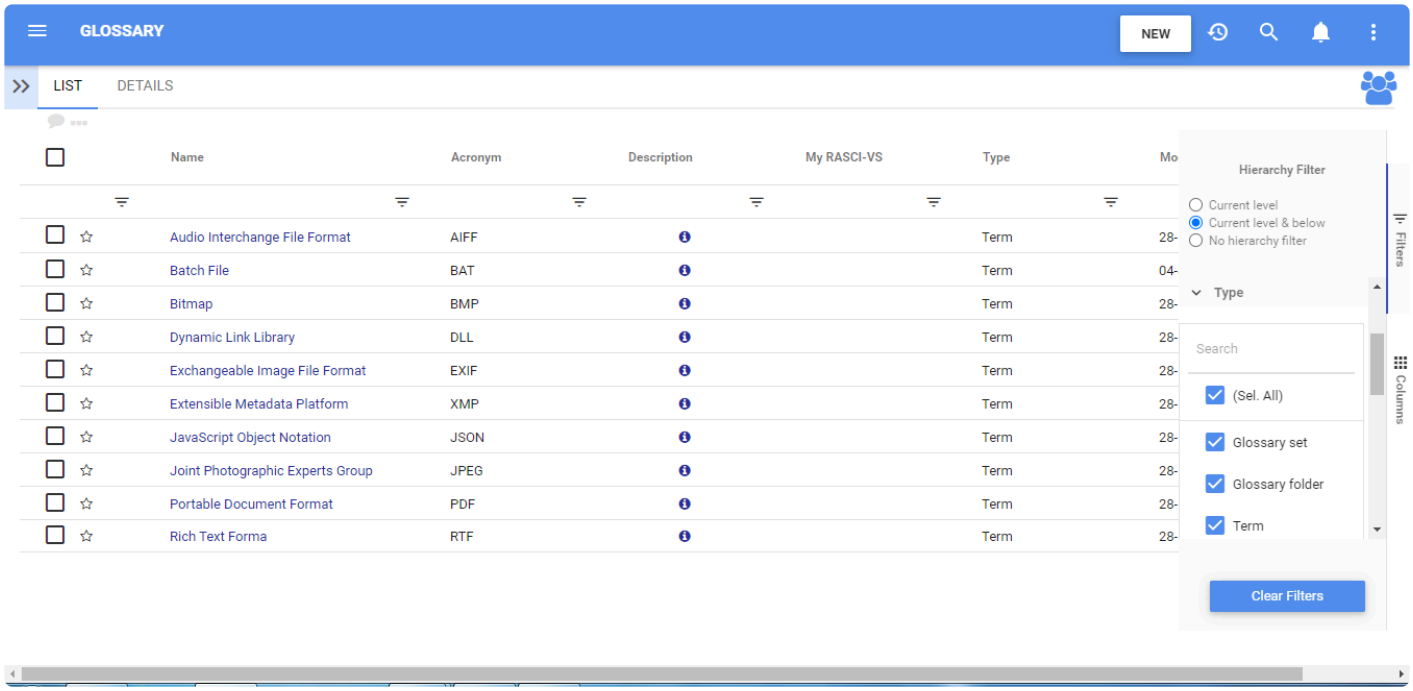
1. How to Add Filter
2. How to Remove Filter
3. How to Combine Filter

4.15.2.2.1 How to Add Filter

You can add filters to see Terms 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.**

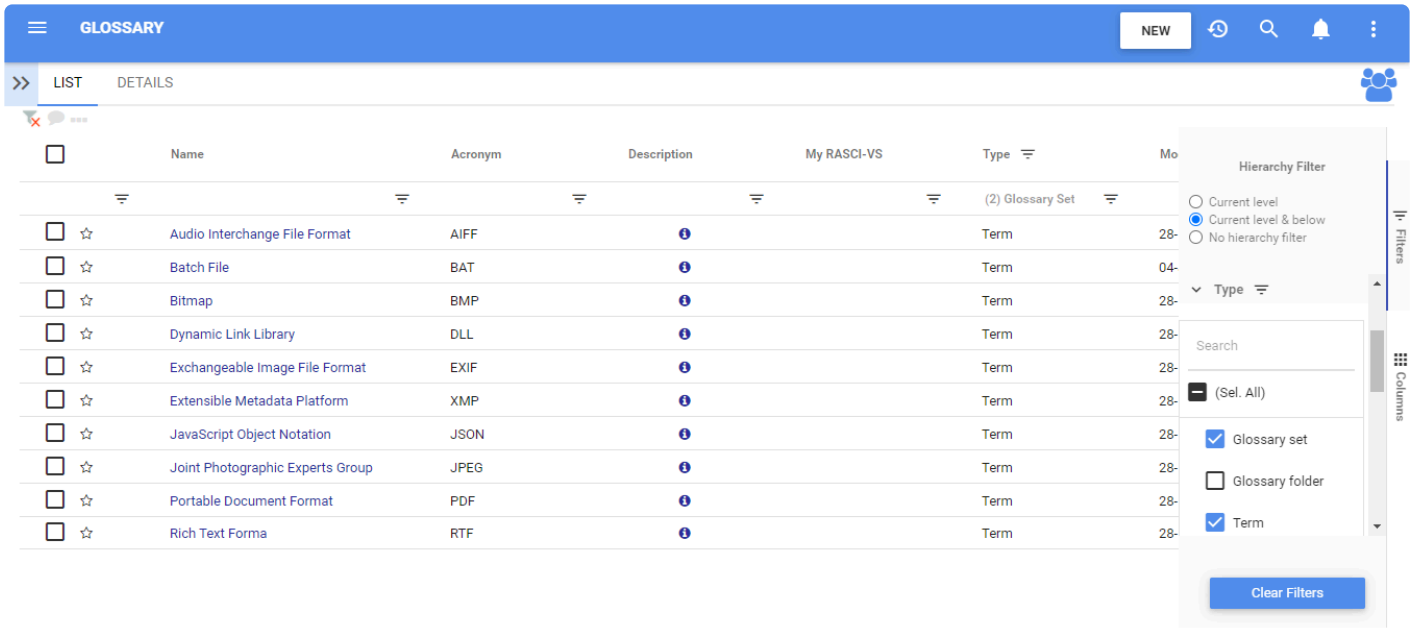
How to Add Filter

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



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

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


GLOSSARY
NEW
LIST
DETAILS
Name
Acronym
Description
My RASCI-VS
Type
Mo
(2) Glossary Set
Audio Interchange File Format AIFF Term 28-
Batch File BAT Term 04-
Bitmap BMP Term 28-
Dynamic Link Library DLL Term 28-
Exchangeable Image File Format EXIF Term 28-
Extensible Metadata Platform XMP Term 28-
JavaScript Object Notation JSON Term 28-
Joint Photographic Experts Group JPEG Term 28-
Portable Document Format PDF Term 28-
Rich Text Forma RTF Term 28-
Hierarchy Filter
Current level
Current level & below
No hierarchy filter
Type
Search
(Sel. All)
Glossary set
Glossary folder
Term
Clear Filters
Filters
Columns

4.15.2.2.2 How to Remove Filter

You can remove filters; this will naturally increase the results in your list.

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

4.15.2.2.3 How to 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**.

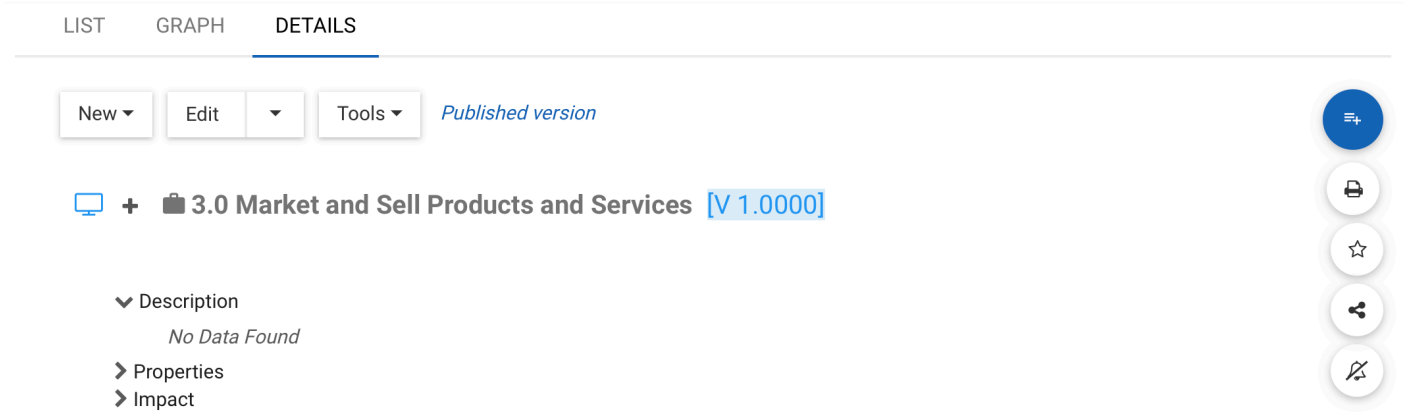
4.15.3 Details

The Description section is where you will find details about the Terms folders, Term Sets, or Terms 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.

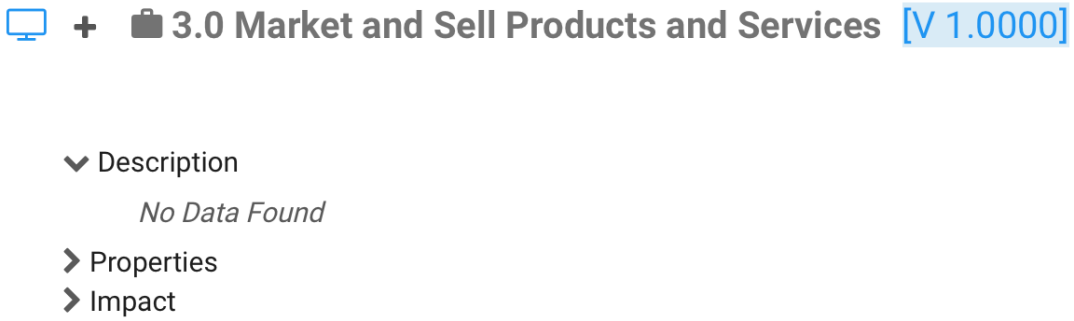
4.15.3.1 Navigation

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



When users view Term folders under the Details tab, users can view the child expansions of the Term Folder.

1. Select the + icon to expand the Term Folder



2. Select the − icon to hide the Term Folder

3.0 Market and Sell Products and Services [V 1.0000]

Description

No Data Found

Properties

Impact

Lead to Cash [V 1.0000]

Description

No Data Found

Properties

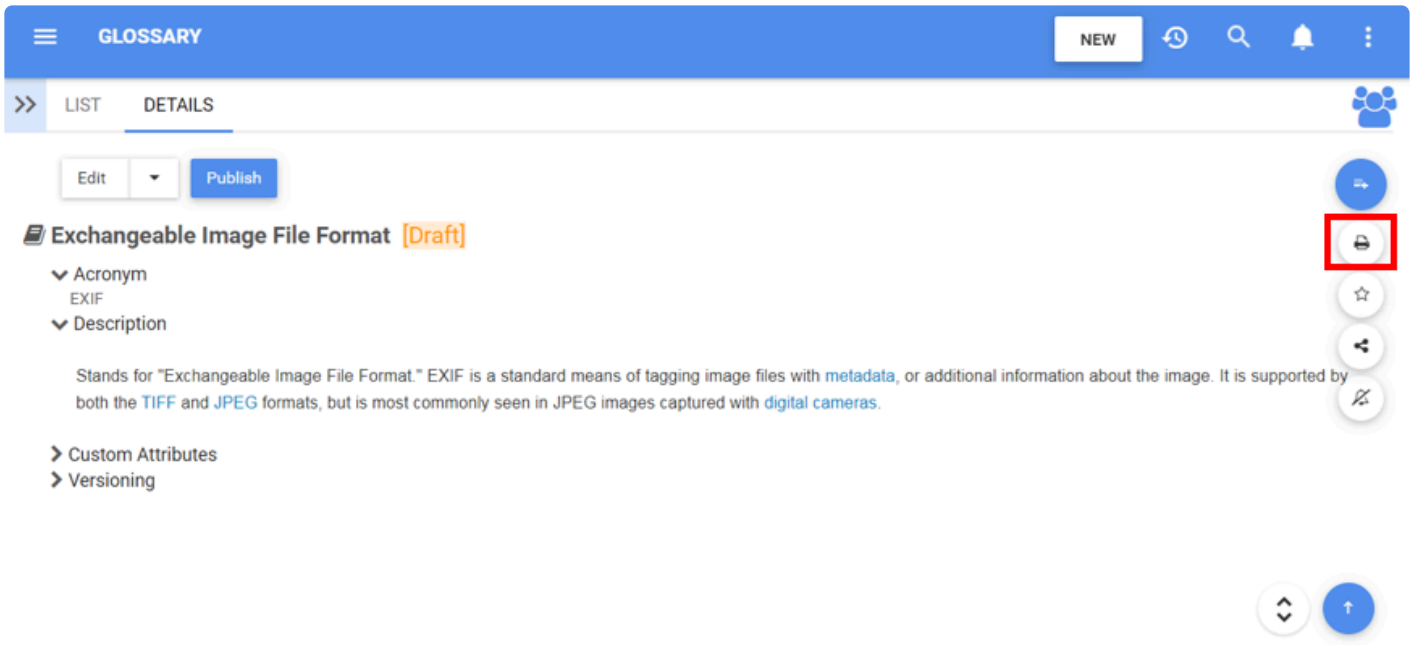
4.15.3.2 Toolbar

The toolbar on the Term 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
Favourite		Allows users to sort by favorites in the “My Actions” widget
Share		Copies URL to user’s clipboard to share
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.

4.15.3.2.1 Print

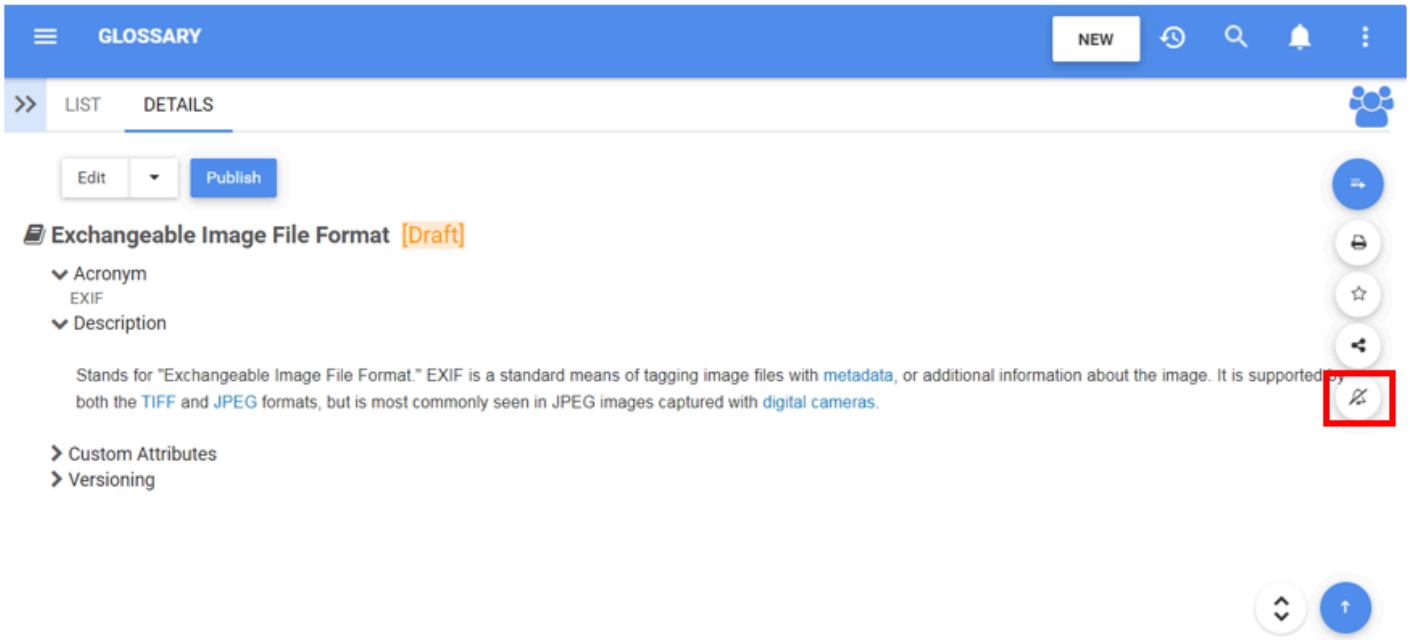
The print button allows users to directly print the details page that they are currently viewing. Selecting the print function will automatically generate a formatted details page printout that a user can print directly.



4.15.3.2.2 Subscribe

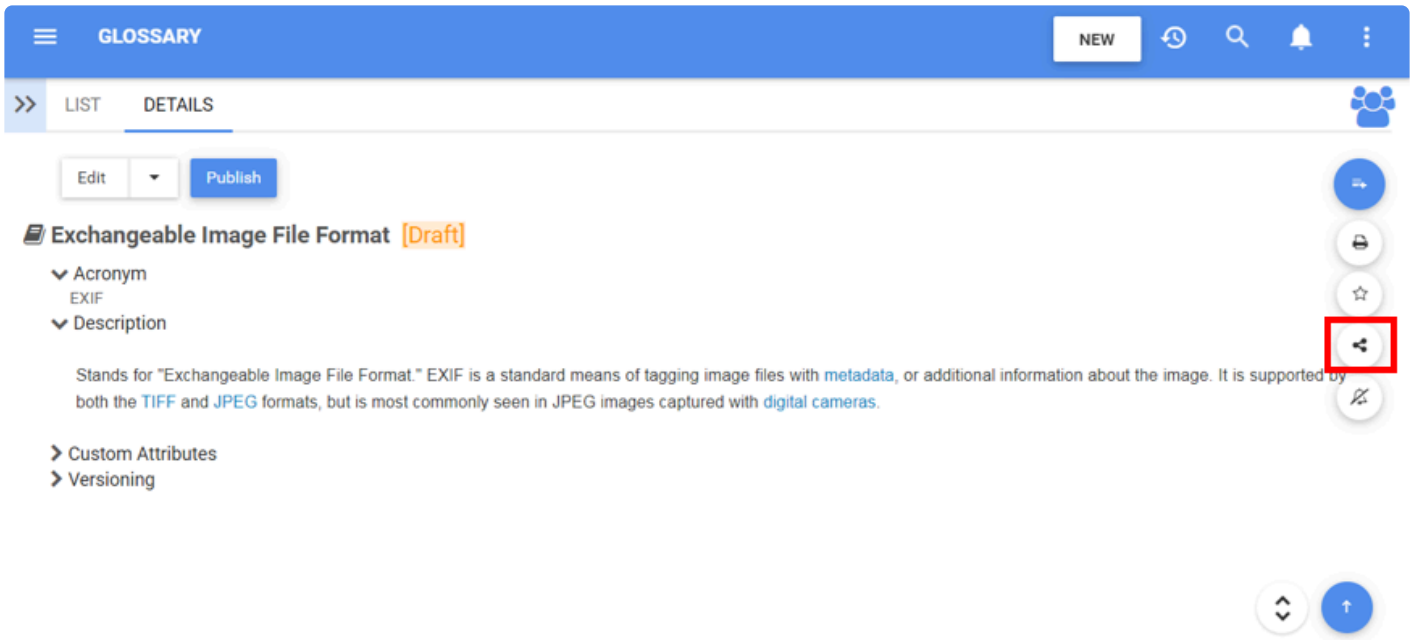
The subscribe function, symbolized by the icon, has been added to allow users to track items, objects and processes in the EPC. Users can subscribe to specific rules to simplify and centralize monitoring activities. By subscribing to items, users will receive notifications when rules are altered or optimized,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



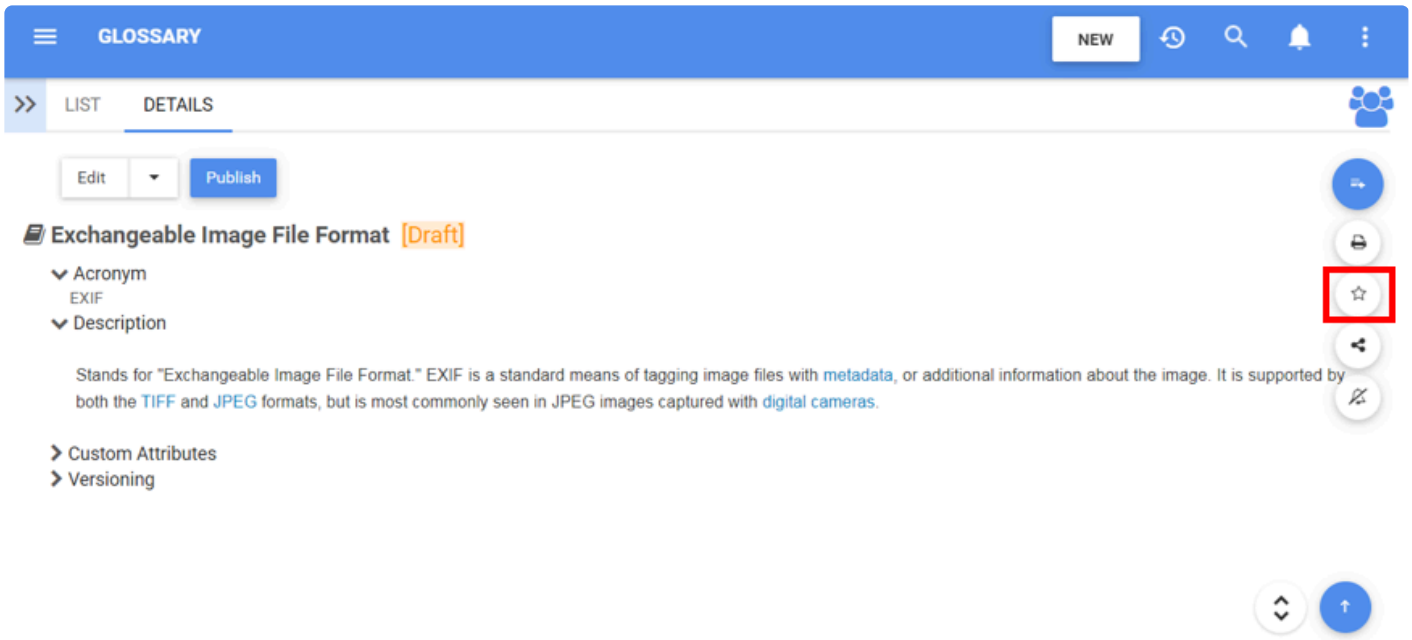
4.15.3.2.3 Share

The share button allows users to directly share the details page that they are currently viewing.



4.15.3.2.4 Favorite

The favorite button allows users to directly favorite the details page that they are currently viewing.



4.15.4 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 specificTerm, Term Set or Term Folder, and provides users with a specific destination that can be used to see and gather all relevant information.

Term Details display the following content

1. “Description”

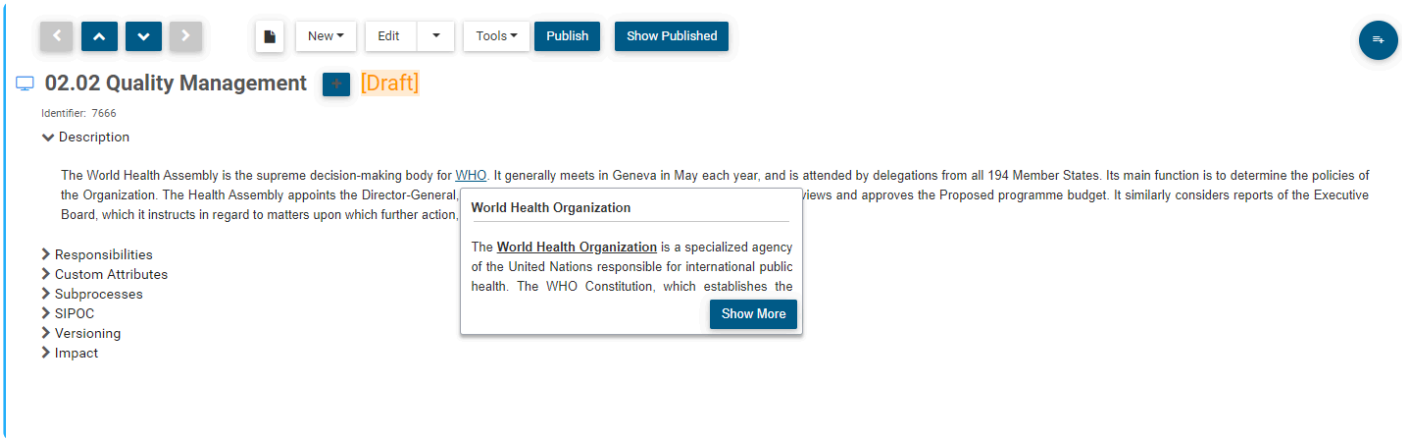
4.15.4.1 Description

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

4.15.4.1.1 Link-to-Object

The link to glossary feature provides tool-tip pop-up definitions to objects found in texts in all of EPC. When editing a text, a user can simply link a text to an object that can be found in the EPC to provide further details or insights on its meaning, its relation to the given context and many more providing better understanding to users.

To access the feature, a user highlights a desired text within a text box and right-clicks. A drop-down menu will appear showing the link-to-object feature; in turn, this will enable a window to search and select a preferred object found within EPC. Once this is done and the initial text box is saved, the details page will present the entire text with the object highlighted. When the cursor crosses over the linked text, a pop-up will appear showing the linked definition.



Any changes made to the specific object in EPC will auto-update any linked texts it is associated to.

4.15.5 Graph

Graphs are used as a visual representation of Glossary items. Graphs allow users to map out their glossaries and provide key stakeholders with item-specific information. They provide users with a high-level overview of Glossary and terms.

The following will be covered in the Graph section:

1. *“Graph Navigation”
2. *“Impact Graph”

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

4.15.5.1 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 **Glossary**

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

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

5. You will be navigated to the Graph section

4.15.5.2 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 terms allows users to better understand the complexity or certain business terms. These Impact Graphs can be used to educate business users.

Impact Graph

IMAGE

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.

IMAGE

Impact Graph Navigation

To navigate to Impact Graphs, please see the following instructions.
1. Navigate to an Term within the Glossary 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

4.16 To Do

The Web App allows user to view and manage a list of all pending actions, task and approvals they are actively engaging with. The purpose of this module is to allow members of an organization to clearly see an outline of their pending and upcoming tasks.

There are 8 different action types that can be found in this module :
1. Objects Pending my Confirmation
2. Objects Pending my Approval
3. Objects Pending my Endorsement
4. Improvement Requests Pending my Implementation
5. Improvement Requests Pending my Review
6. Improvement Requests Waiting for Publish
7. Objects Pending my Review
8. Out of Sync

4.16.1 Module Overview

EPC's To Do Module allows user to view all pending and upcoming tasks and actions. This allows members of an organization to clearly see an outline of their pending and upcoming tasks. The Web App provides the users with a viewing options to better understand the many task.

Dimension	Details
1. List	Provides view of all processes that you have access to including the flow objects within them

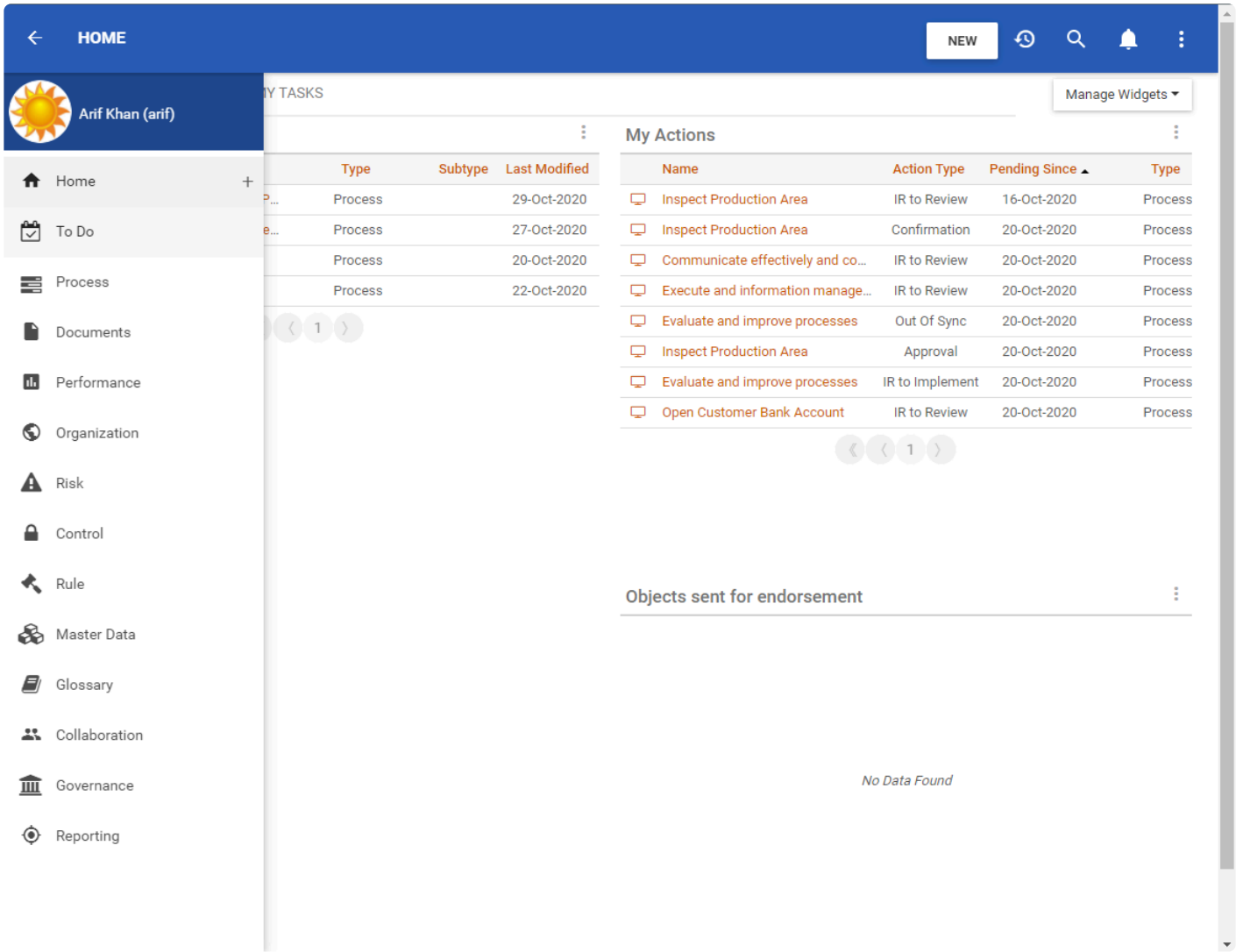
Actions that have been assigned to users can be viewed in this module.

How to access the To Do module:

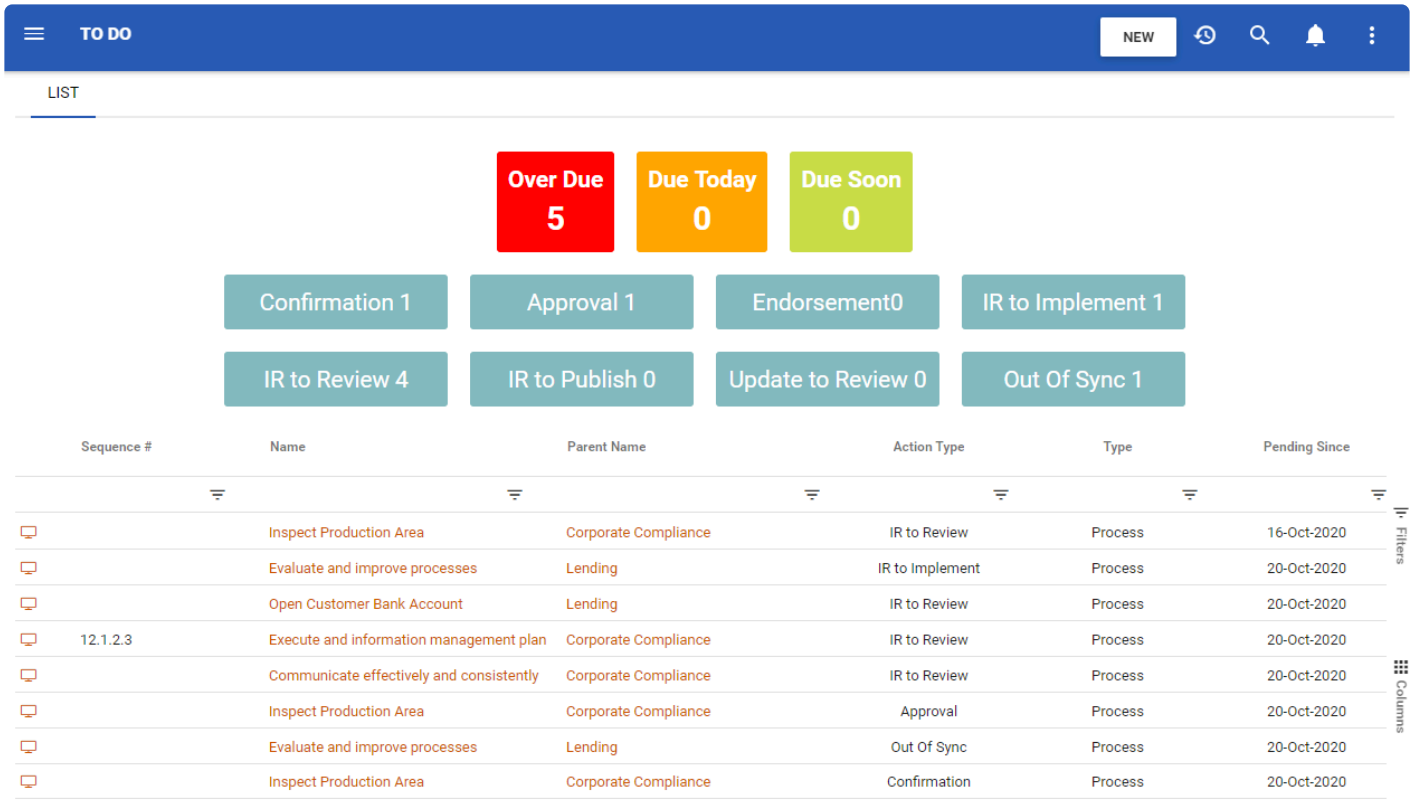
1. Click on the **Navigation Menu Button** on the top left of your screen.

or

2. Click on **To Do**



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


TO DO
NEW
LIST
Over Due 5
Due Today 0
Due Soon 0
Confirmation 1
Approval 1
Endorsement0
IR to Implement 1
IR to Review 4
IR to Publish 0
Update to Review 0
Out Of Sync 1
Sequence #
Name
Parent Name
Action Type
Type
Pending Since
Inspect Production Area Corporate Compliance IR to Review Process 16-Oct-2020
Evaluate and improve processes Lending IR to Implement Process 20-Oct-2020
Open Customer Bank Account Lending IR to Review Process 20-Oct-2020
12.1.2.3 Execute and information management plan Corporate Compliance IR to Review Process 20-Oct-2020
Communicate effectively and consistently Corporate Compliance IR to Review Process 20-Oct-2020
Inspect Production Area Corporate Compliance Approval Process 20-Oct-2020
Evaluate and improve processes Lending Out Of Sync Process 20-Oct-2020
Inspect Production Area Corporate Compliance Confirmation Process 20-Oct-2020
Filters
Columns

4.16.2 List

List view allows you to see all action items that you have access to, including the specific details within them. Viewing an action items in a list allows users to have a quick view of various tasks assigned to them..

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

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

List Components

Component	Description
Sequence #	Allows users to sort processes chronologically by associated sequence number
Name	Textual search for any existing name of an object
Parent	Whether or not there is a Parent included with the item in question
Type	The type of the object
Action Type	Type of Action user is engaging with
Pending Since	The pending date where the action was sent to user
Due Date	The date where the action is due by

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

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

4.16.2.1 Sorting

Sorting allows users to classify processes based on selected criteria.

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

Filter	Details
Sequence #	Allows users to sort actions chronologically by associated sequence number
Name	Allows users to sort actions by a key number or word within business object names
Type	Allows users to sort action by their specific object type
Action Type	Allows users by their specific object type
Pending Since	Allows users to sort actions chronologically from the pending date
Due Date	Allows users to sort processes chronologically by the due date

How to use “Sorting” Function

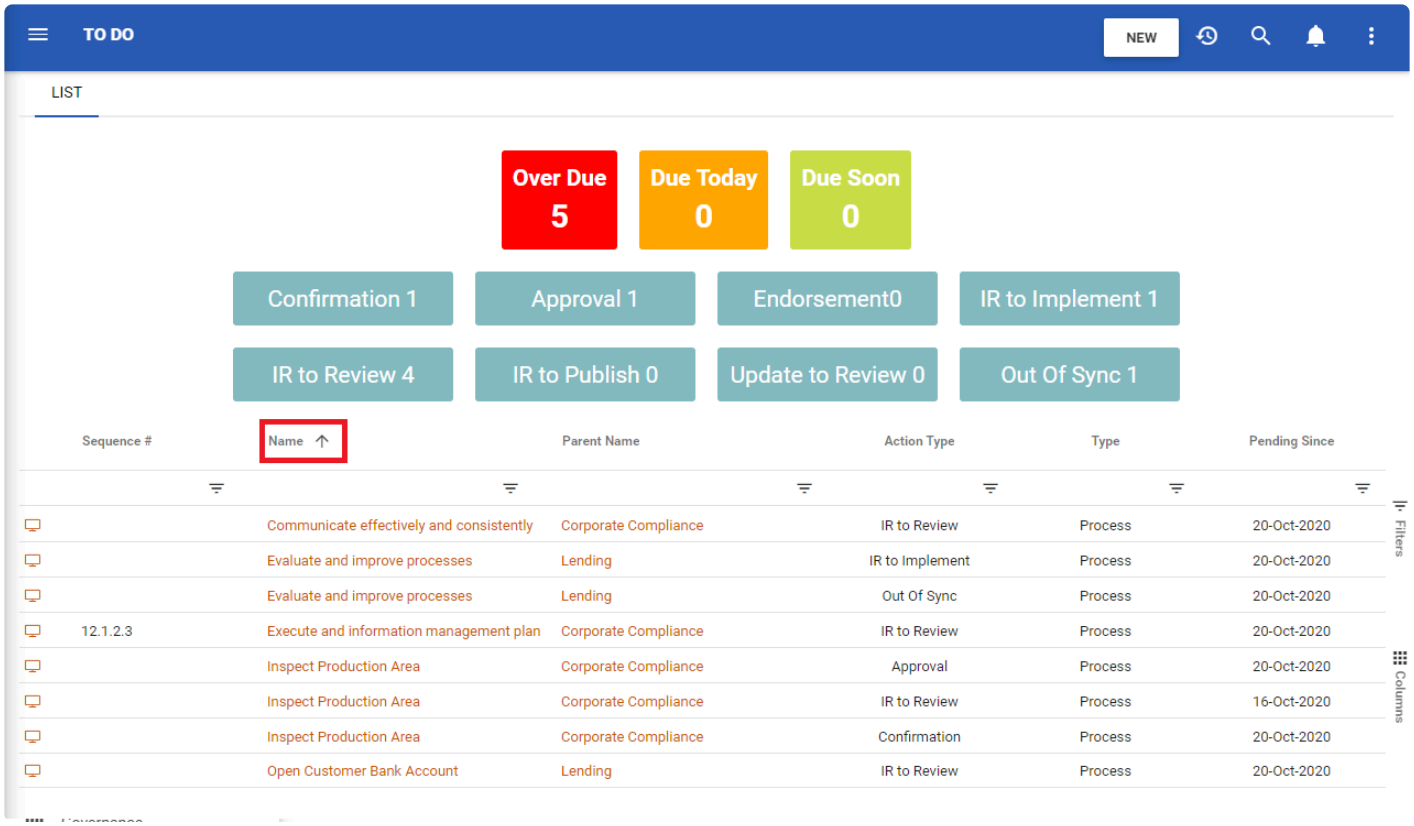
1. Navigate to the To Do Module

2. Navigate Cursor to desired **Category**

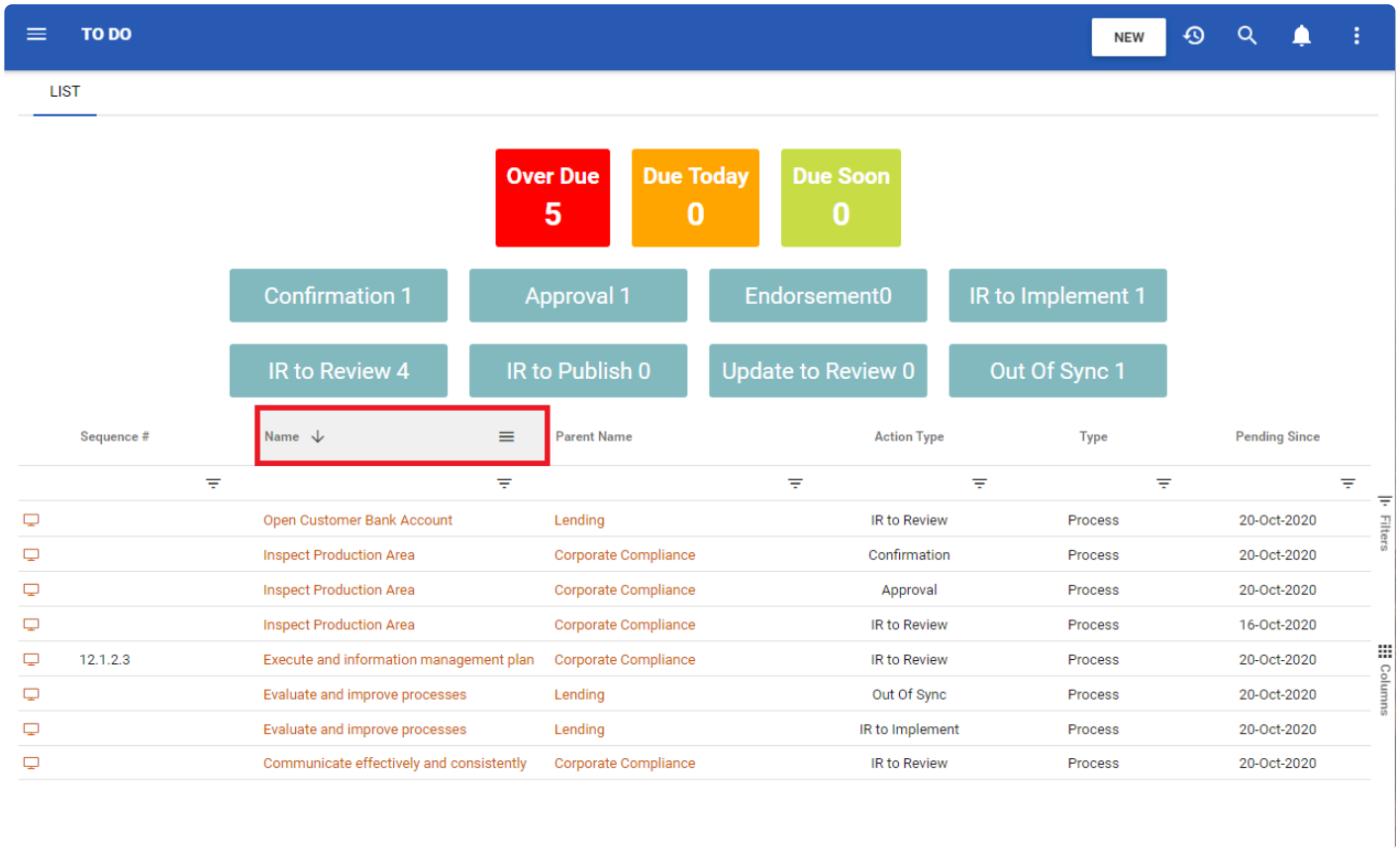
3. Click on the **Category**

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 object name are listed as “1, 2, 3, A, B, C”.



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



4.16.2.2 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
Parent Name	Textual search for any existing parent name of an object
Action Type	IR to Implement IR to Review IR to Publish Confirmation Approval Out of Sync Update To Review Endorsement
Parent	Empty – The object has no associated parent Not-Empty – The object has at least one associated parent
Type	Asset Asset Attribute Control Set Control Folder Master Data Set Master Data Folder Document Set Document Folder Document End Entity Gateway Glossary Set Glossary Folder Intermediate KCI

	KPI KRI Input Output Set Input Output Folder Performance Set Objective Org Unit Set Org Unit Process Set Process Resource Risk Set Risk Folder Risk Role Rule Set Rule Folder Rule Shorcut Start Task Term
Pending Date	Date – mm/dd/yyyy
Due Date	Date – mm/dd/yyyy

The Filtering section will cover the following:

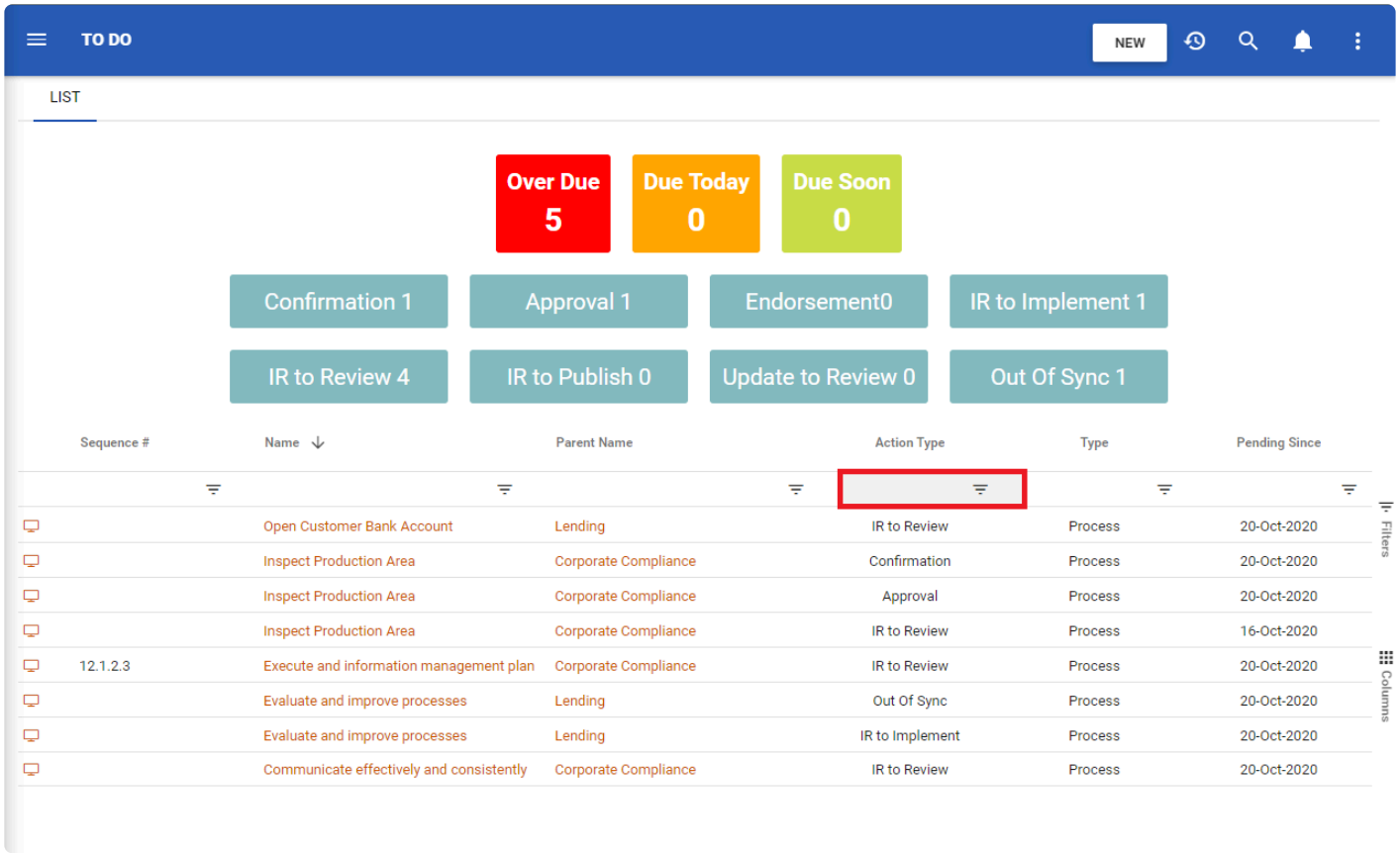
1. How to Add Filter
2. How to Remove Filter
3. How to Combine Filter

4.16.2.2.1 Add Filter

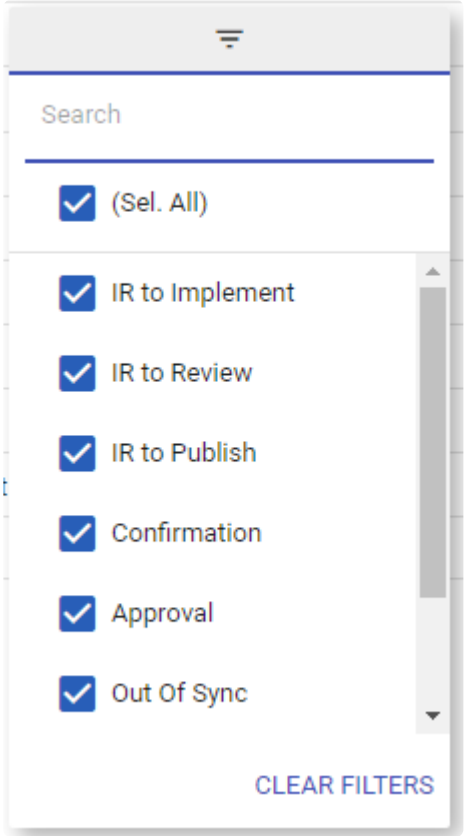
You can add filters to see specific actions and other items of your choice. Type what you are looking for, select the filter in the drop-down menu, or define the range by dates.

How to Add Filter

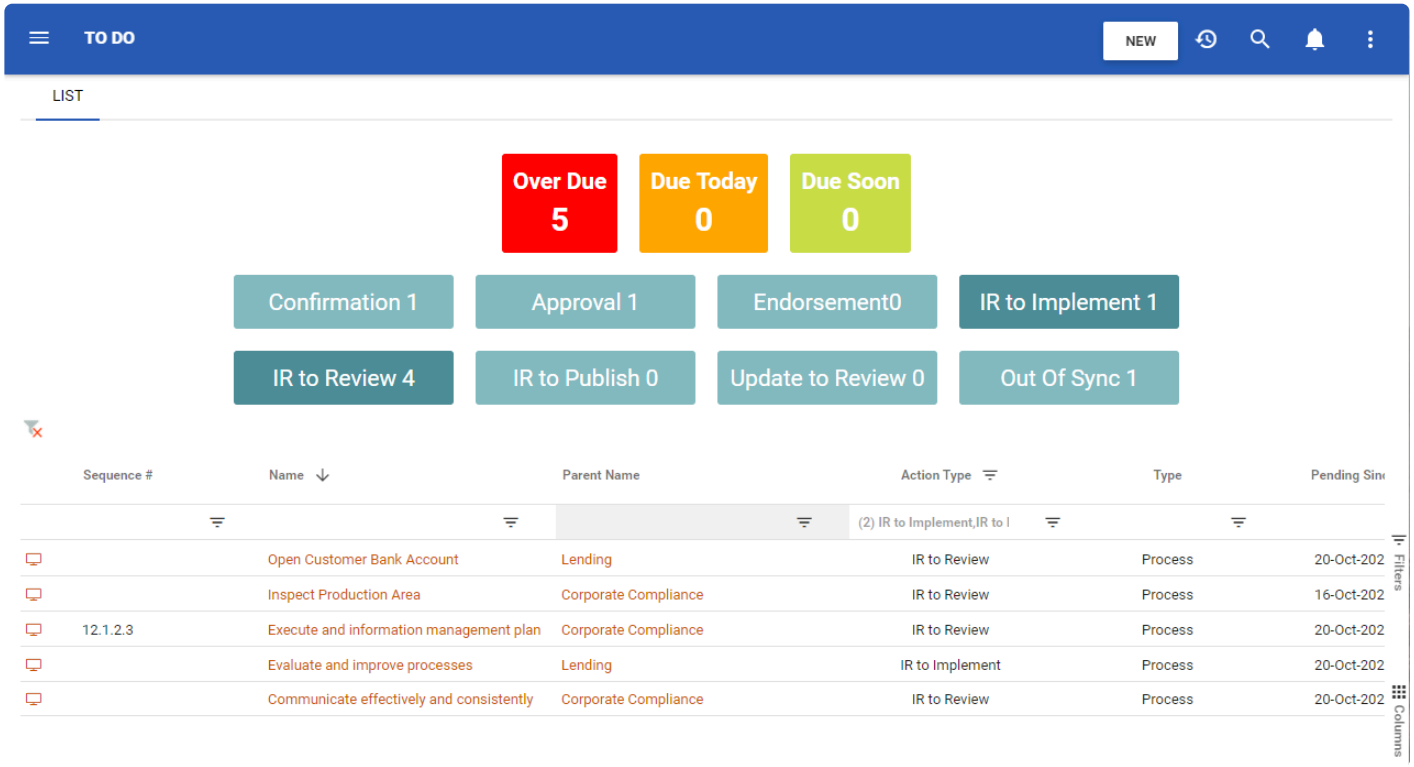
1. Navigate cursor and select the box column you wish to filter. For this example, we will use **Action Type.**



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

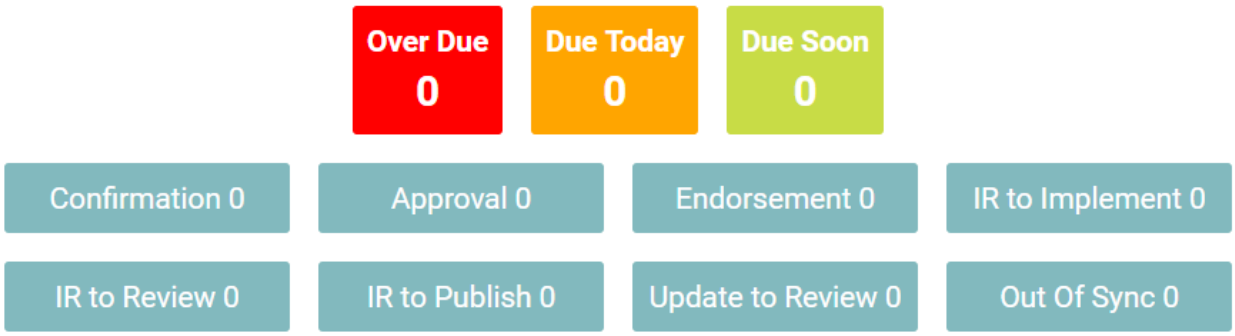


3. Select the desired filter. For this example, we will select **IR to Implement** and **IR to Review.**

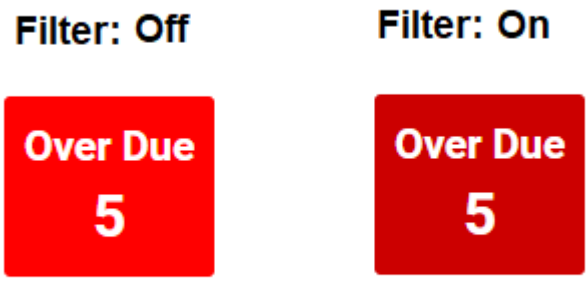


4. Additionally, you can click on any of these following buttons to filter the results:

Name	Filter Action
Over Due	This filter shows every action that is over due
Due Today	This filter shows every action that is due today
Due Soon	This filter shows every action that are due within a week
Confirmation	Filters action by Confirmation Type
Approval	Filters action by Approval Type
Endorsement	Filters action by Endorsement Type
IR to Implement	Filters action by improvement request to implement
IR to Review	Filters action by improvement request to review
IR to Publish	Filters action by improvement request to publish
Update to Review	Filters action by update to review
Out Of Sync	Filters action by processes which are out of sync



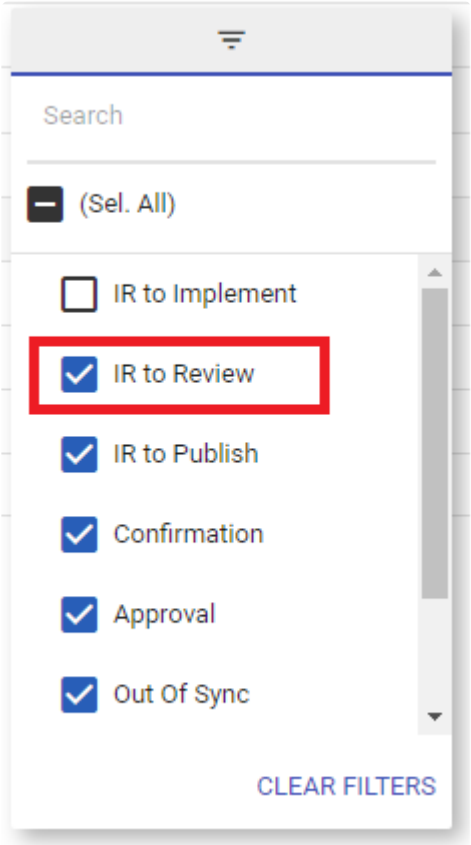
If you click on a button to filter the list, then that button will be highlighted



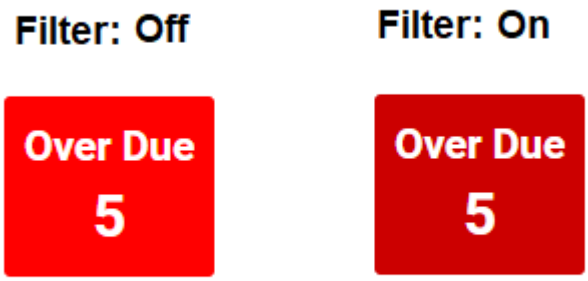
4.16.2.2.2 Remove Filter

You can remove filters; this will naturally increase the results in your list.

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



Click on a button to filter the list, and click on it a second to infilter the list

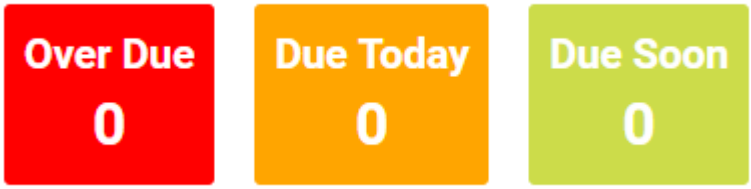


4.16.2.2.3 Combine Filter

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

You can also use the following three buttons can also be combine with the other action type buttons filter to provide a narrower search result

Name	Filter Action
Over Due	This filter shows every action that is over due
Due Today	This filter shows every action that is due today
Due Soon	This filter shows every action that are due within a week



4.17 Capability

4.17.1 Module Overview

EPC's Capability Module allows users to view and obtain information about what the business supports and/or offers. The EPC provides 3 different dimensions, allowing users to properly view and understand their organizational structure.

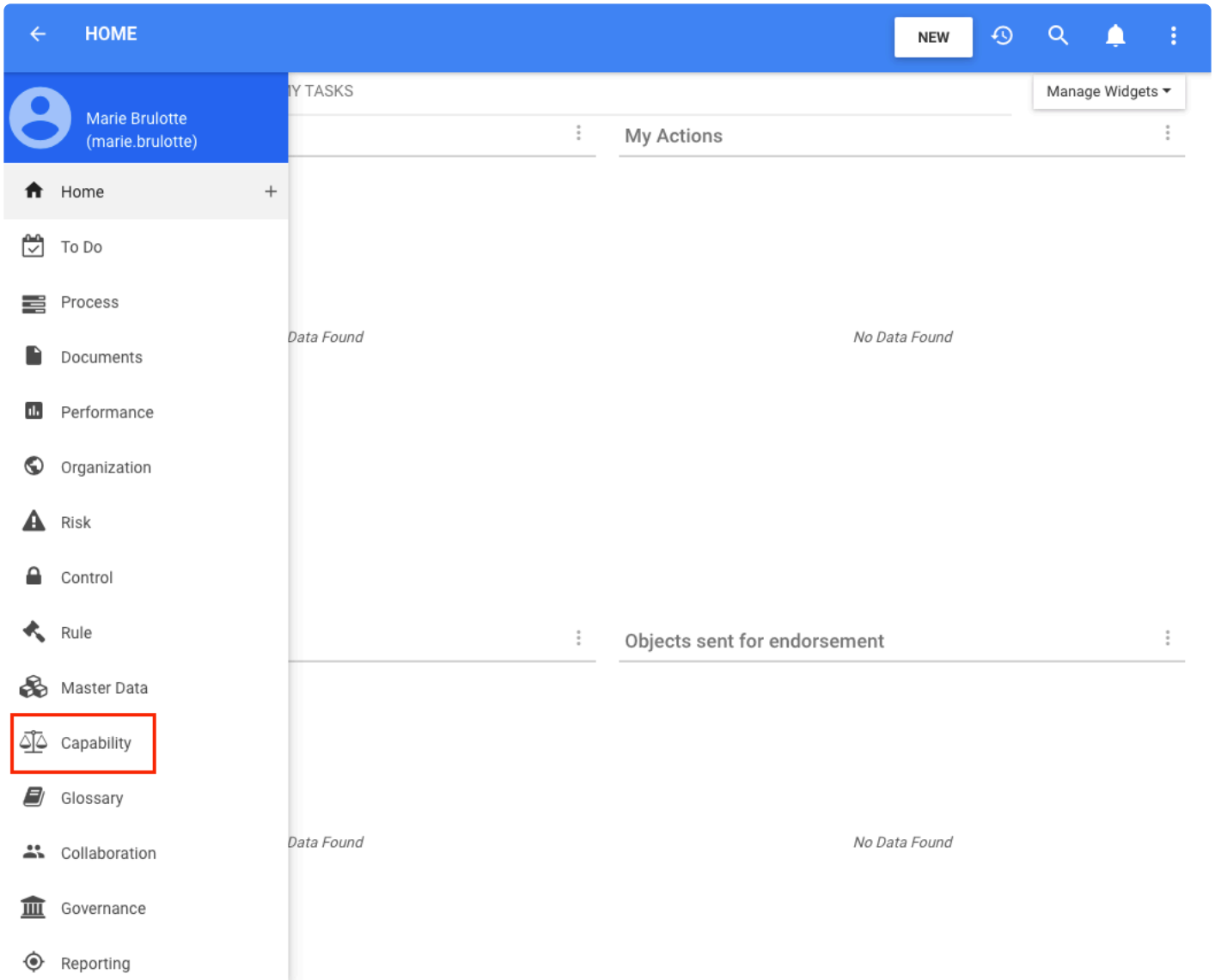
Dimension	Details
1. List	Provides view of all capability sets you have access to
2. Graph	Provides the visual representation of the capability set, their features and links (Impact and Hierarchy Graphs)
3. Details	Provides additional key information regarding specific capability details

How to access the Capability module:

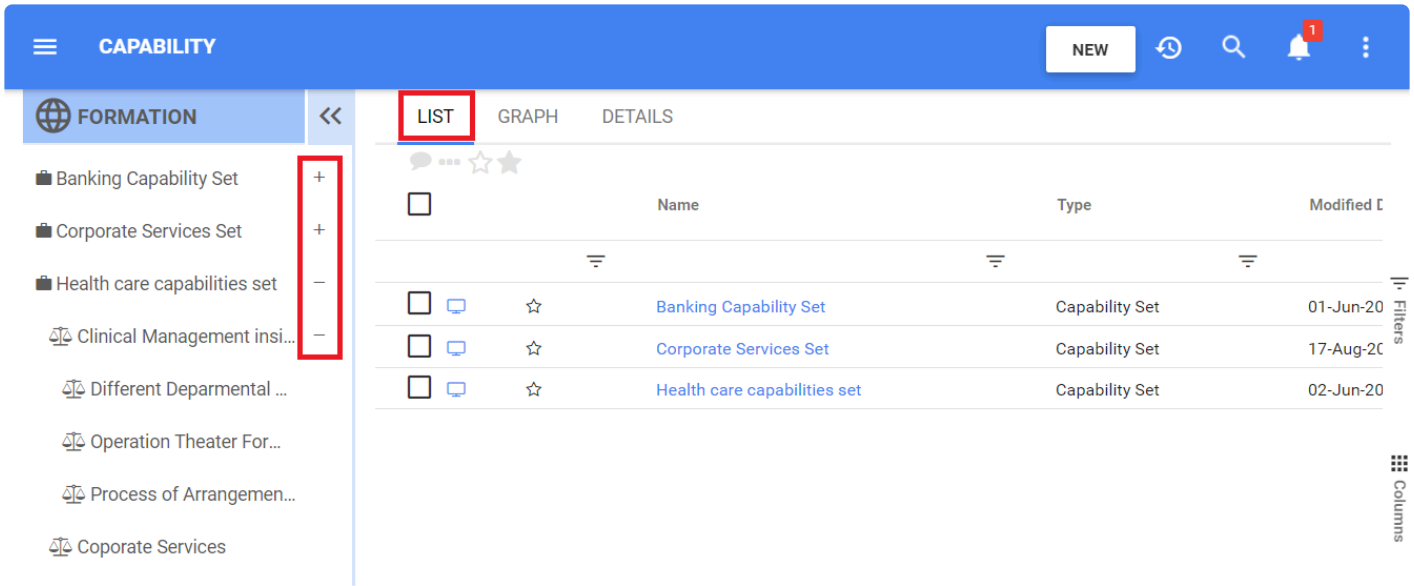
1. Click on the **Navigation Menu Button** on the top left of your screen.

or

2. Click on **Capability**



3. On the left side, users can see the capabilities tree, with the sets. To view the capabilities inside the sets, users can expand the sets by clicking on the + sign. On the right side, by default, the list view of the capability module is accessed.


CAPABILITY
NEW
FORMATION
Banking Capability Set
Corporate Services Set
Health care capabilities set
Clinical Management insi...
Different Deparmental ...
Operation Theater For...
Process of Arrangemen...
Coporate Services
LIST
GRAPH
DETAILS
Name
Type
Modified D
Banking Capability Set
Capability Set
01-Jun-20
Corporate Services Set
Capability Set
17-Aug-2
Health care capabilities set
Capability Set
02-Jun-20
Filters
Columns

4.17.2 List

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

List view provides mass editing

Click on button Collaboration to add collaborative tasks with colleagues.

favorite or unfavorite objects in the list.

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

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

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

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

List Components

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

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

© 2020 Interfacing Technologies Corporation

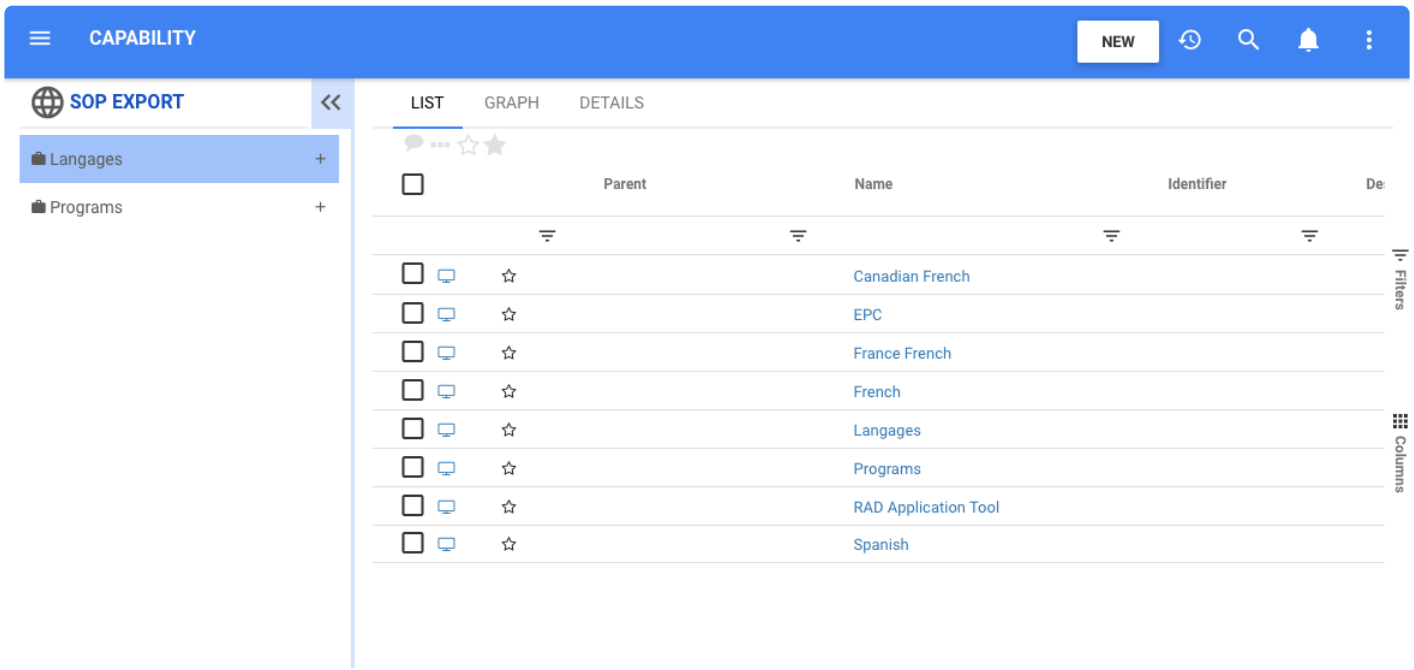
The number of columns displayed will be contingent on the user's screen resolution.

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

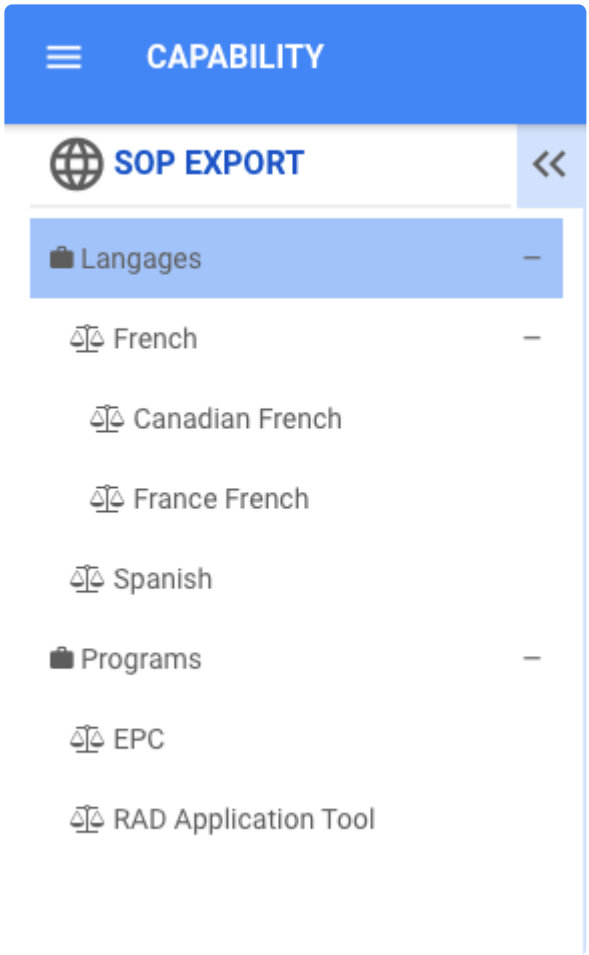
1. Click on the **Navigation Menu Button** on the top left of your screen

2. Click on **Capability**

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



- By default, only the Capability sets will appear in the left section. You can click on the + button to open the capabilities associated to the capability set like shown below:

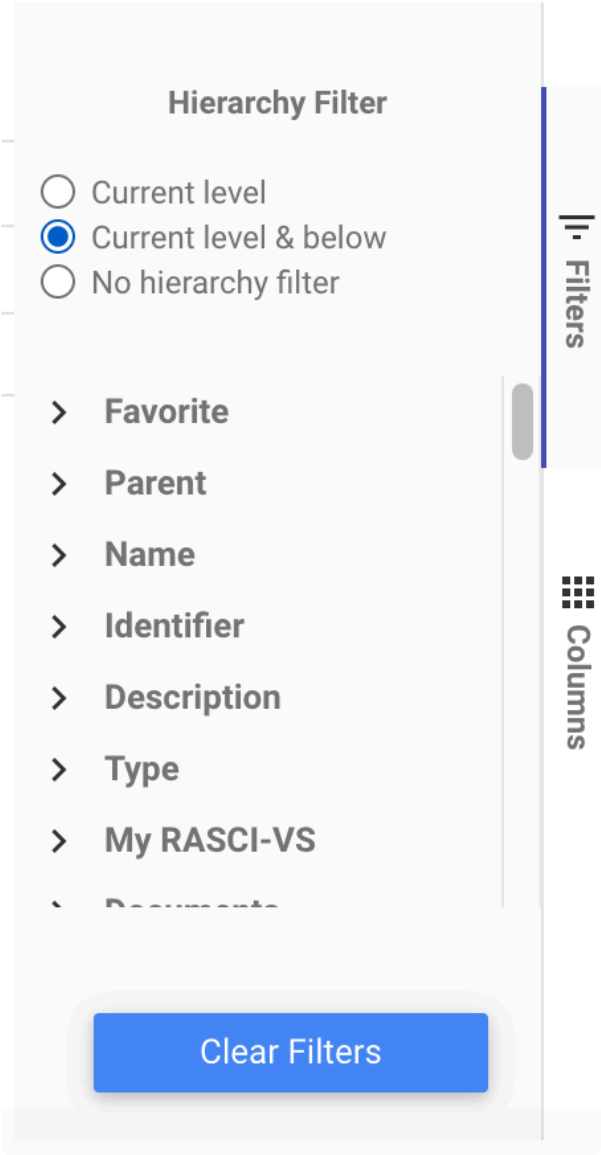


To simplify process viewing; users **are not** shown all major sub-capabilities that they are associated to. However users can display these sub-capabilities and associated objects within the **List View**. Please see the **Optional** steps below:

4. (Optional) To view sub-processes, users must select the filter panel and then select “Current level & below” of the EPC Web App.

5. (Optional) Click on the filter setting and it will generate a list view

6. (Optional) Select “Current level & below”



7. (Optional) Upon selecting the “Current level & below”, EPC will automatically refresh the page

4.17.2.1 Sorting

Sorting allows users to classify capabilities 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 Capabilities 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
Type	Allows users to sort risks based on their specific type
Capability Status	B3
Business Value	B4
Technical Health	B1
Importance to Strategy	B2
Competitive Positioning	B3
Status	Allows users to sort risks based on their status
Modified Date	Allows users to sort risks chronologically by date last modified

How to use the "Sorting" Function

1. Navigate to the Capability Module

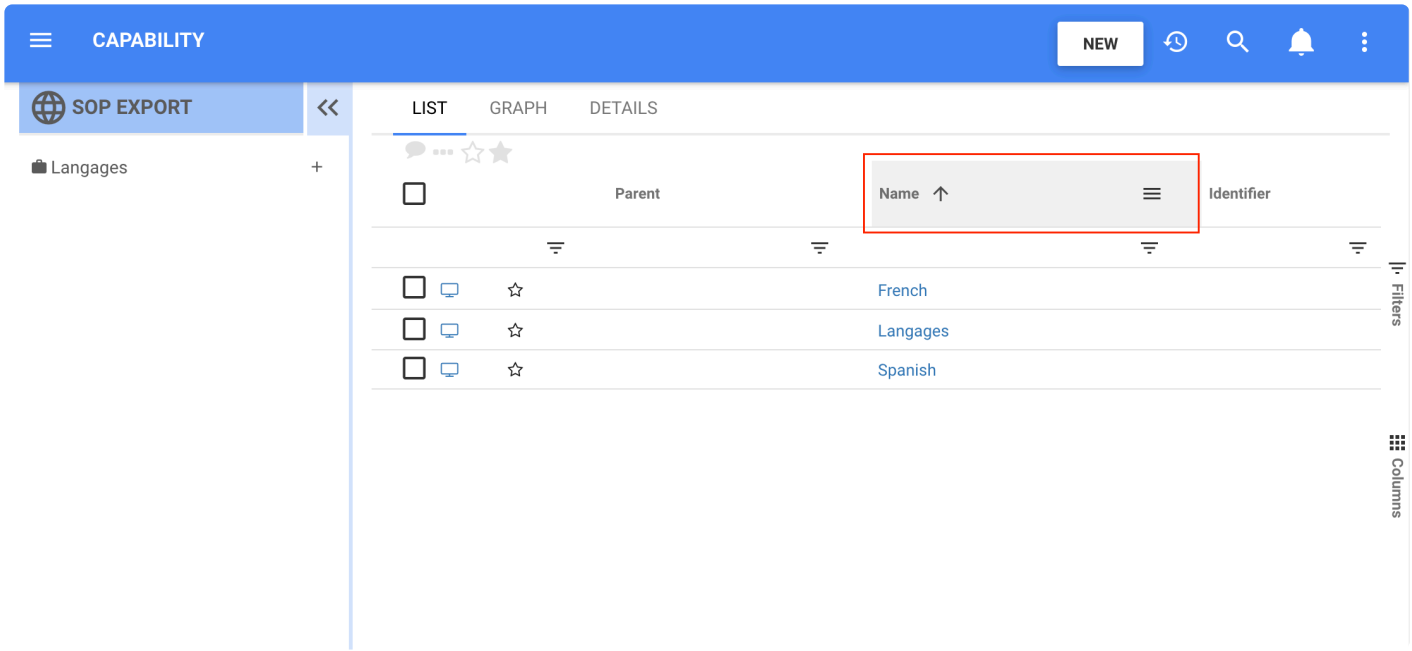
2. Navigate Cursor to desired **Category**

3. Click on the **Category**

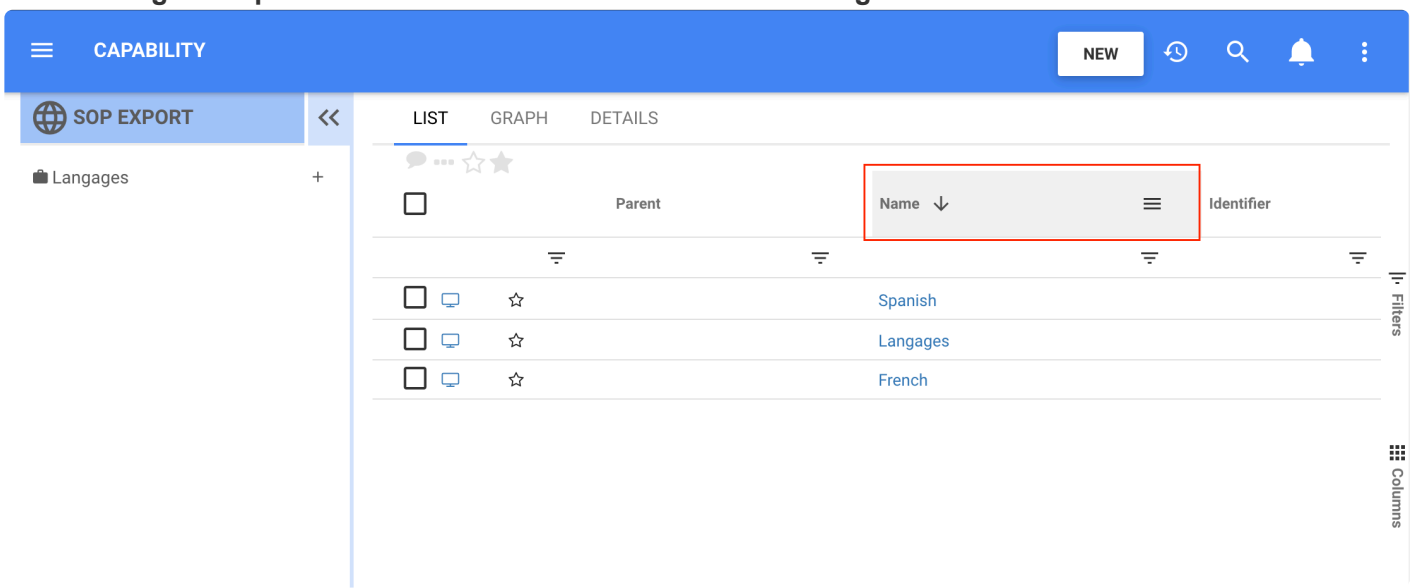
4. One click will sort the Category in Ascending order, reflected by

Two Clicks will sort the Category in Descending order, reflected by
Three Clicks will Remove the sorting action

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



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



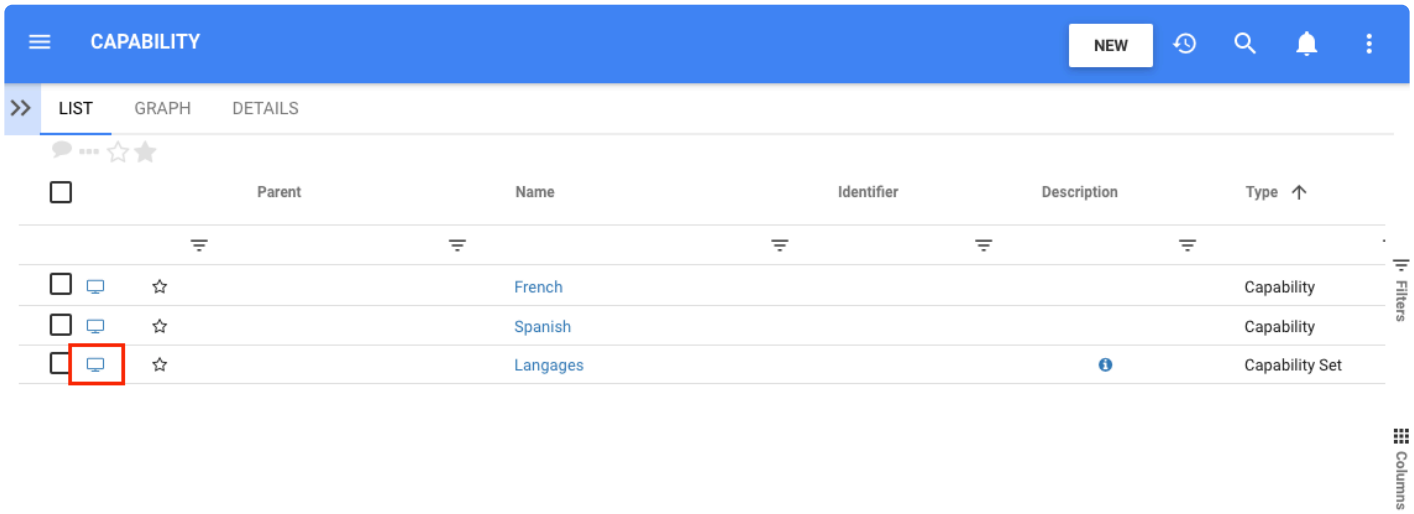
4.17.2.3 Quick Graph View

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

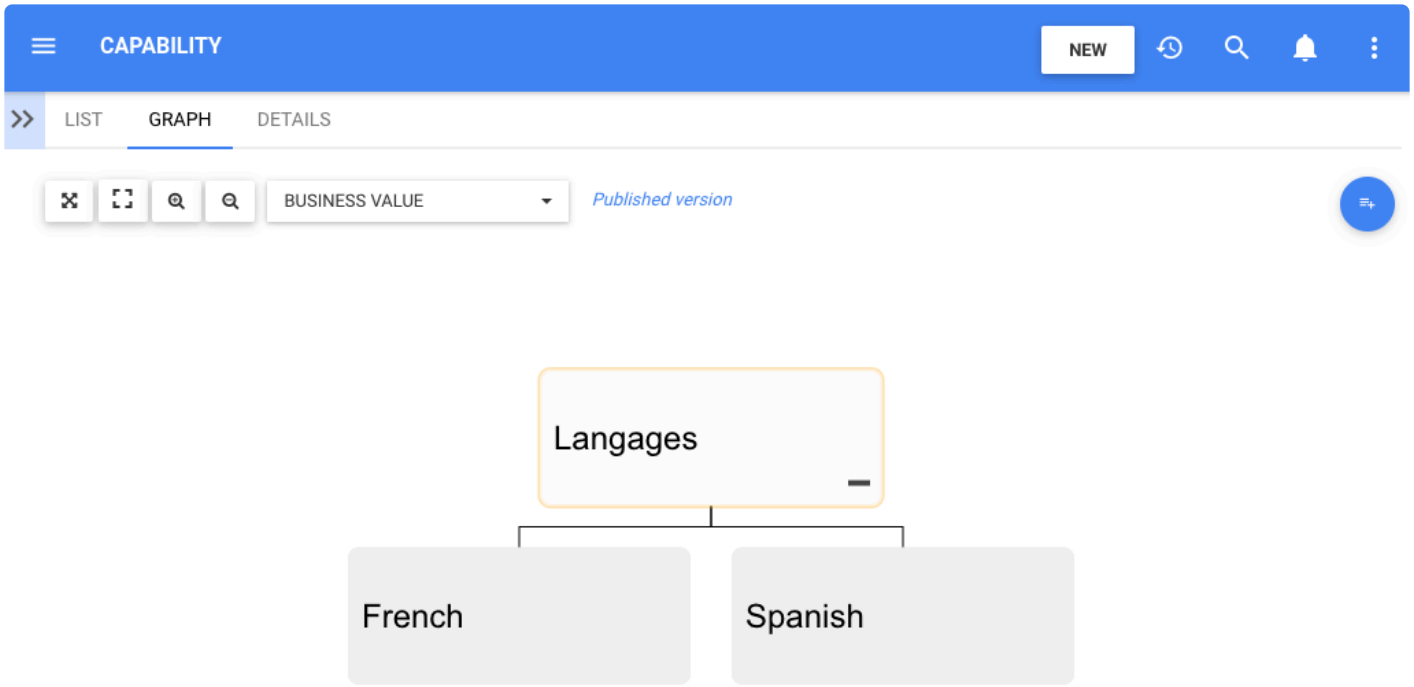
Please see the instructions below:

1. Navigate to the Capability 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.

4.17.3 Graph

Graphs are used as the primary visual representation of capabilities. Graphs allow organizations and users to map out their capabilities and provide key stakeholders with necessary information. They provide users with a high-level overview of capabilities, as well as their business value, importance to strategy and technical health.

The following will be covered in the Graph section:

1. Graph Navigation
2. Impact Graph
3. Hierarchy Graph

4.17.3.1 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.

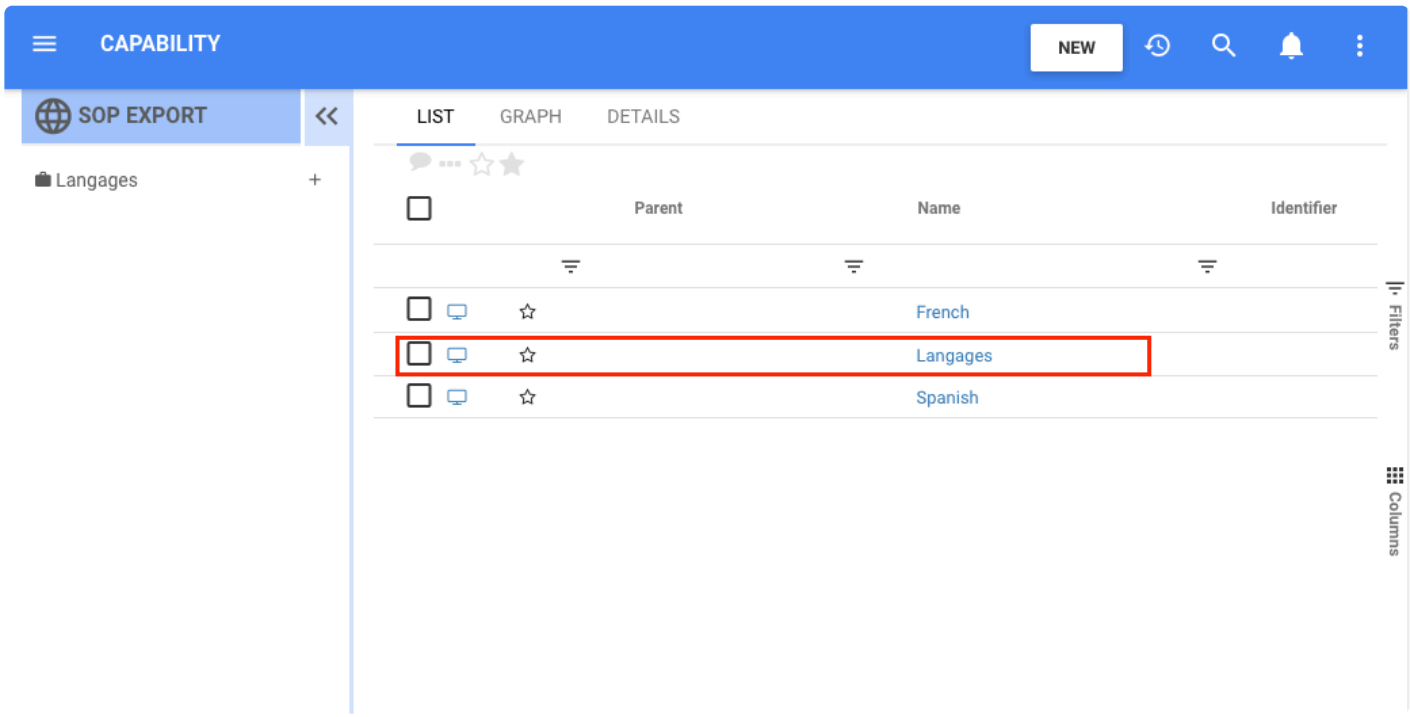
How to navigate to the Graph section (Manual Navigation)

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

2. Click on the module **Capability**

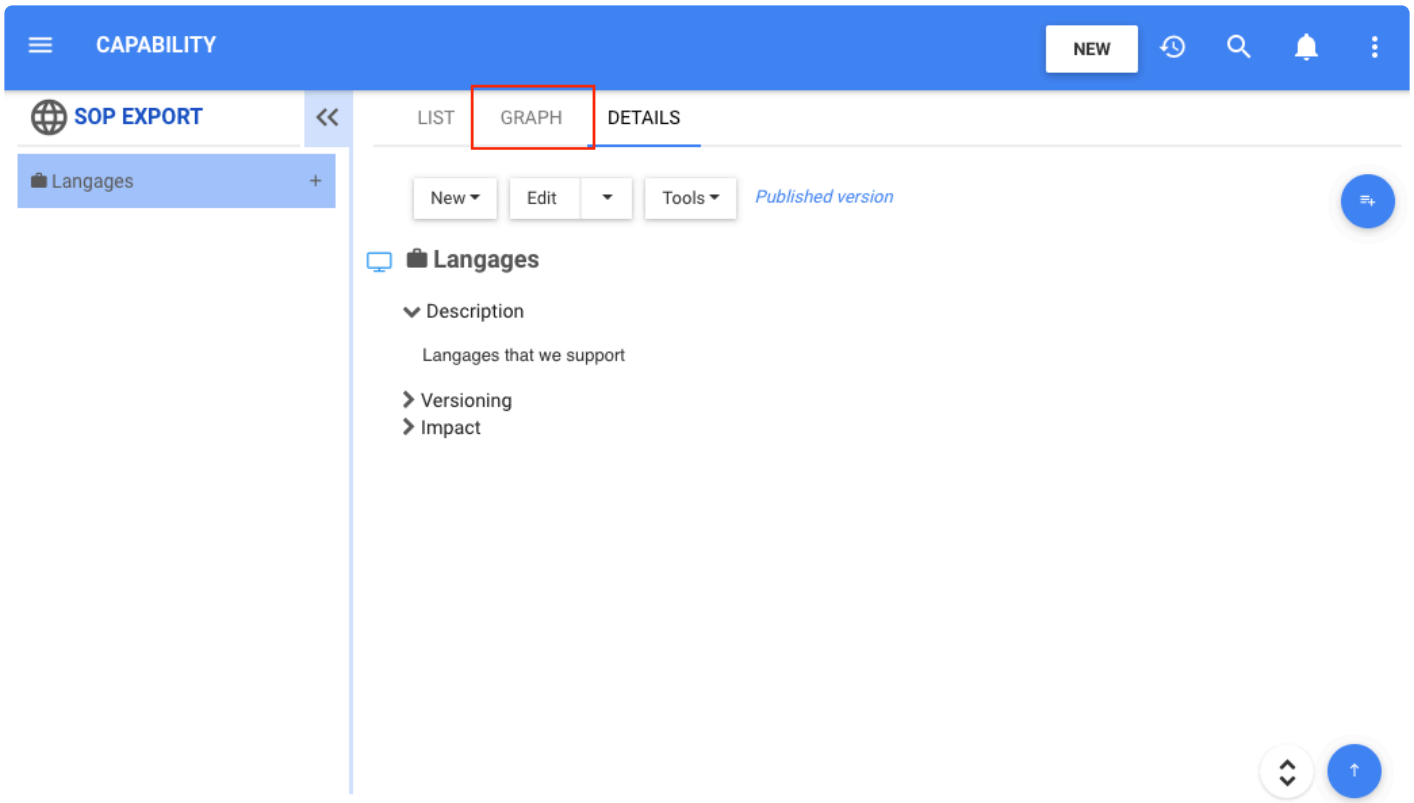
3. By default, you will be directed to **List View** in the Capability module.

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

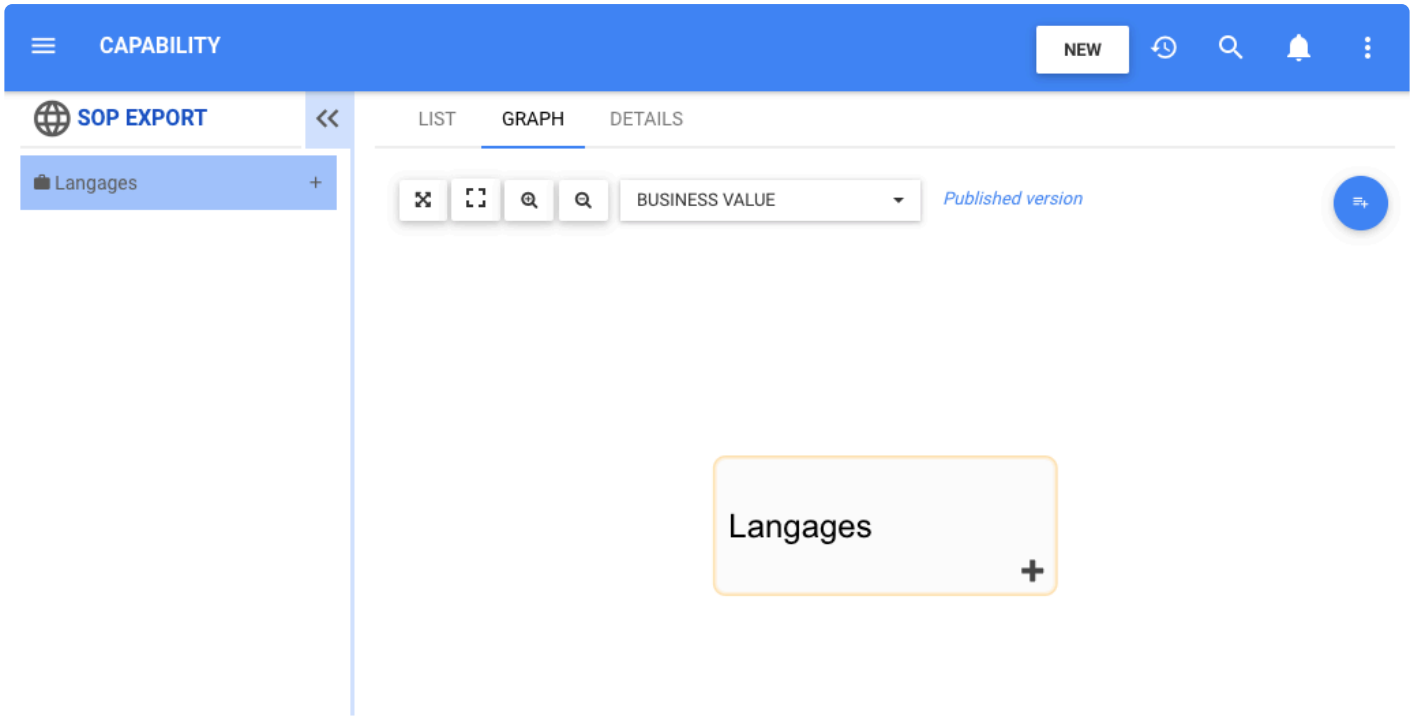


5. You will be prompted to the item’s details page

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

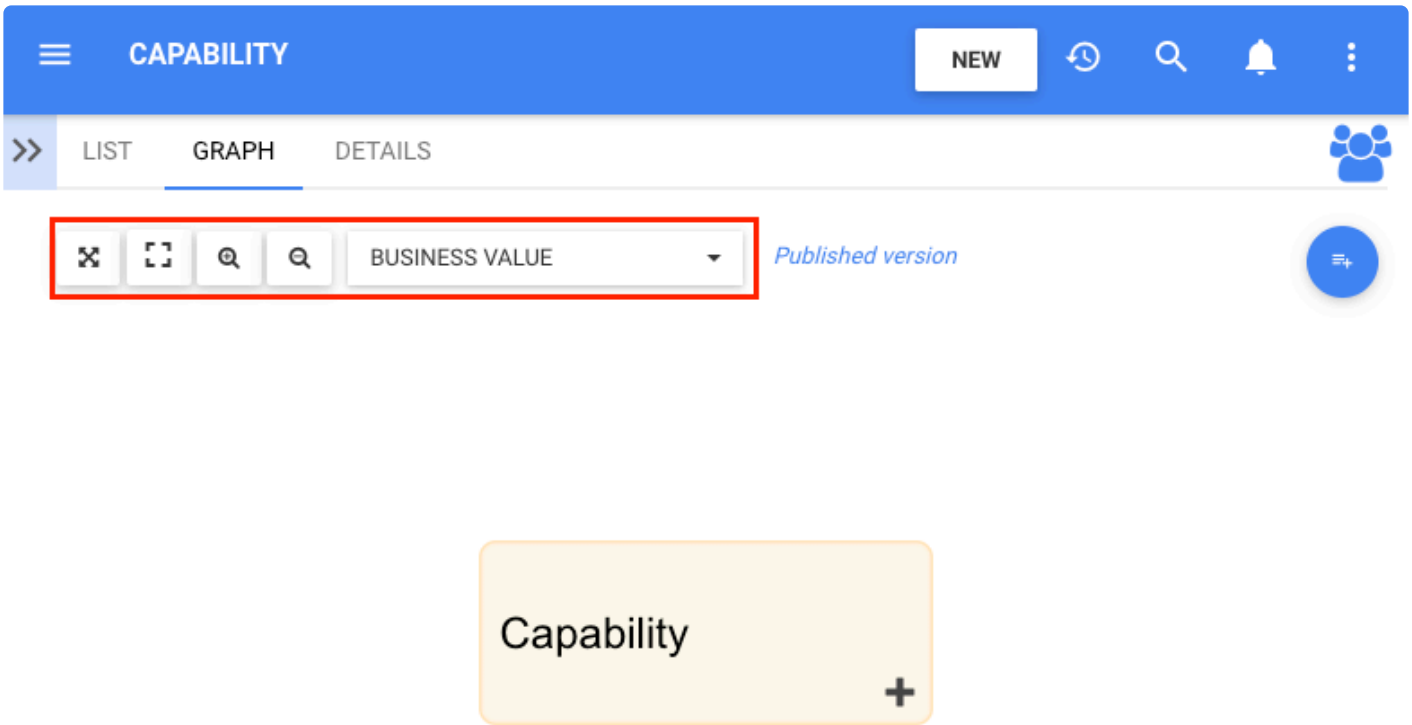


7. You will be navigated to the Graph section. By default, users will be sent to Impact view as the default Graph view, on Business Value. An example of this view can be seen below.



4.17.3.1.1 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 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 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

Analysis Toggle Drop-Down Menu	BUSINESS VALUE	This button will allow a user to toggle between the color code of the analysis of the capability they are viewing

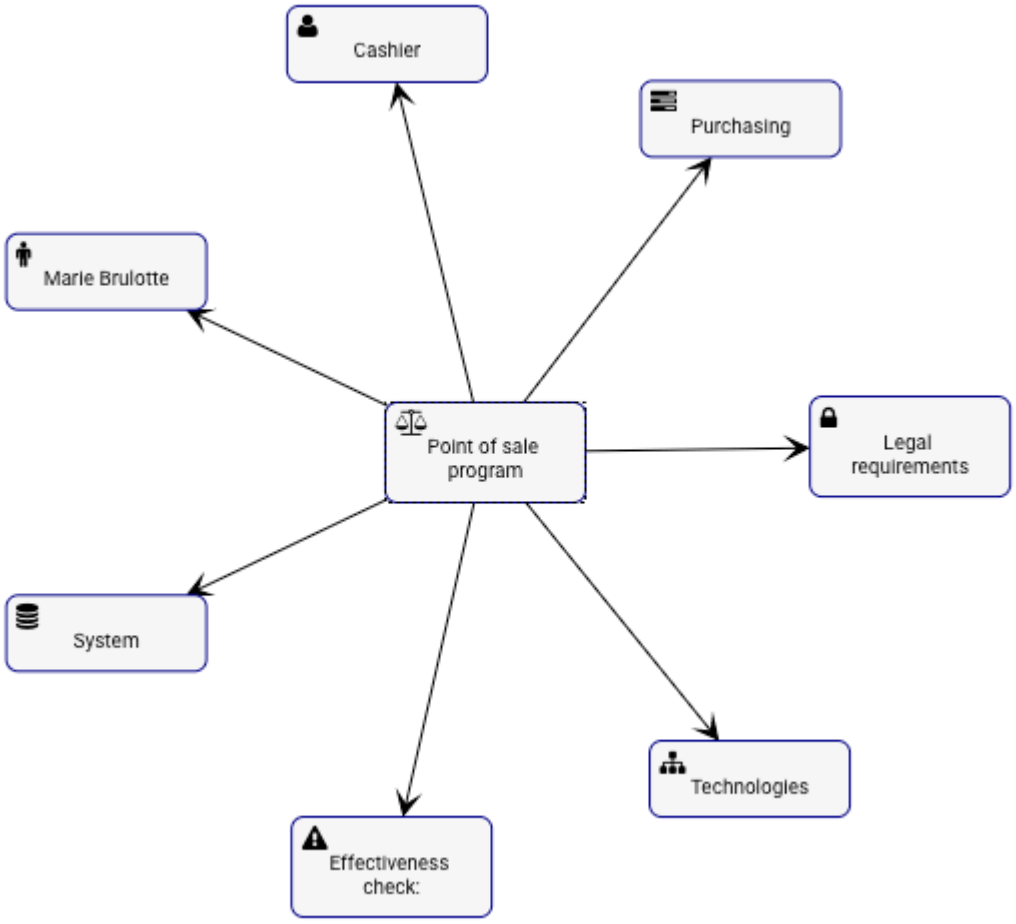
Section 2: items are focused on Graph selection. Please see the table below for a full list and description of each item.

Item	Icon	Description
Impact Graph		Graph showing downstream representation of associated items
Hierarchy Graph		Graph showing a top-down view of performance measures and how they fit within organizations
Share		Copies URL to user's clipboard to share
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.

4.17.3.2 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

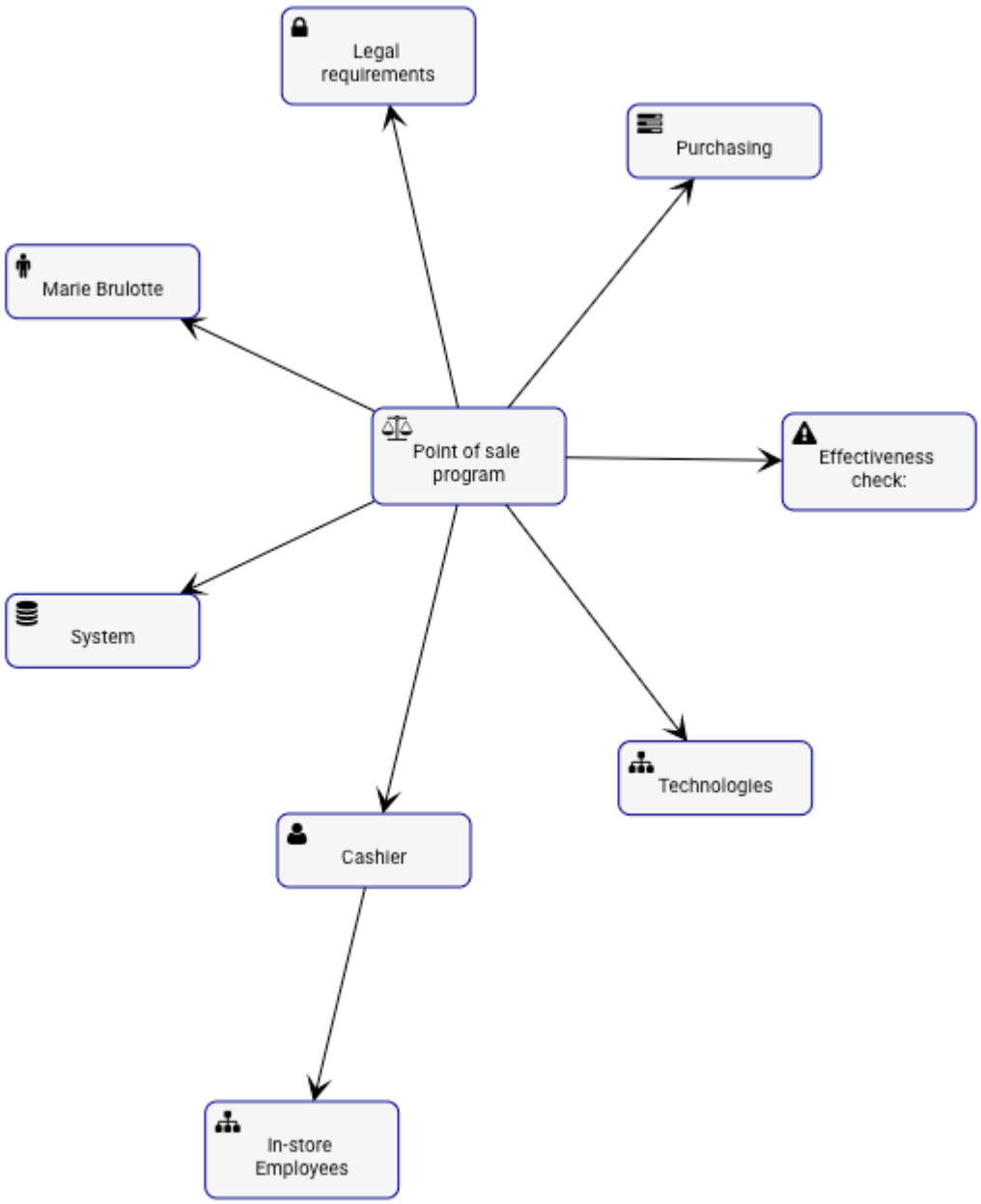


The example features the Impact Graph of the “Point of Sale Program” Capability. The Capability itself has a Role (Cashier), an Asset (System), a Control (Legal requirements), a Ressource (Marie Brulotte), a Risk (Effectiveness check), a Process (Purchasing) and an Org Unit (technologies) associated 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.

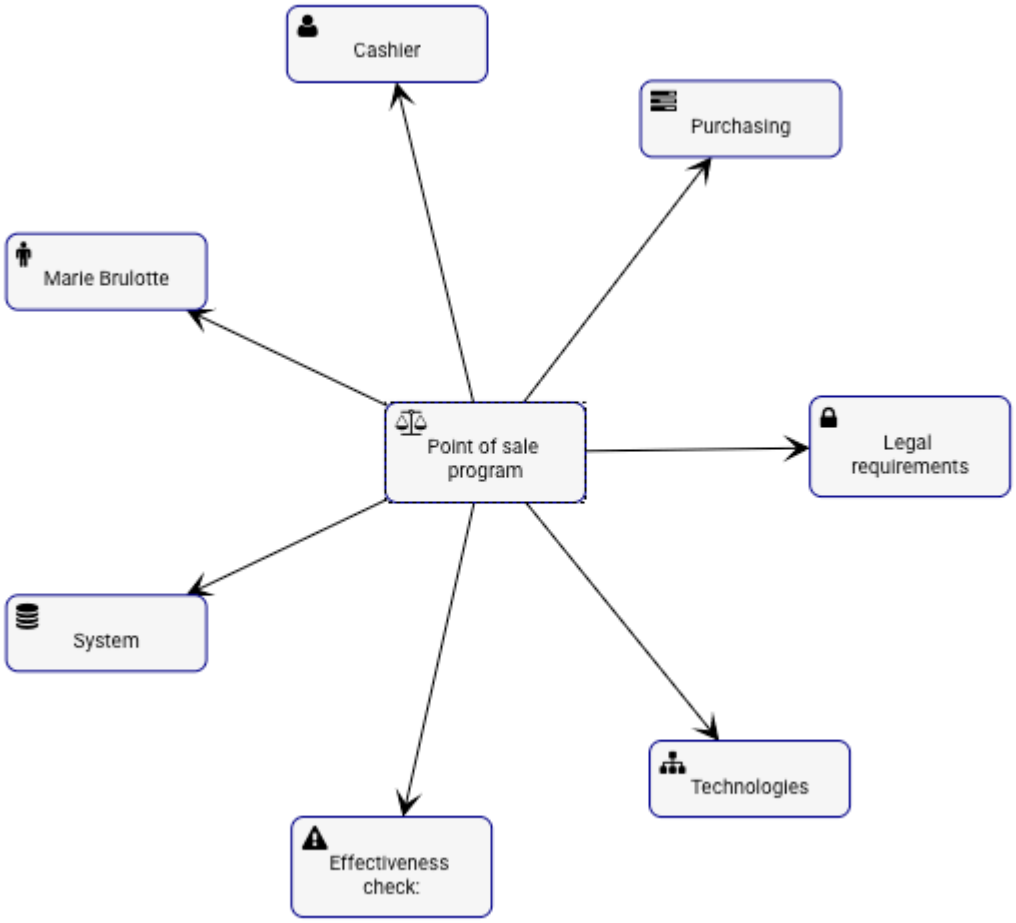
Impact Graph Navigation

To navigate to Impact Graphs, please see the following instructions.
1. Navigate to a Capability within the Capability Module

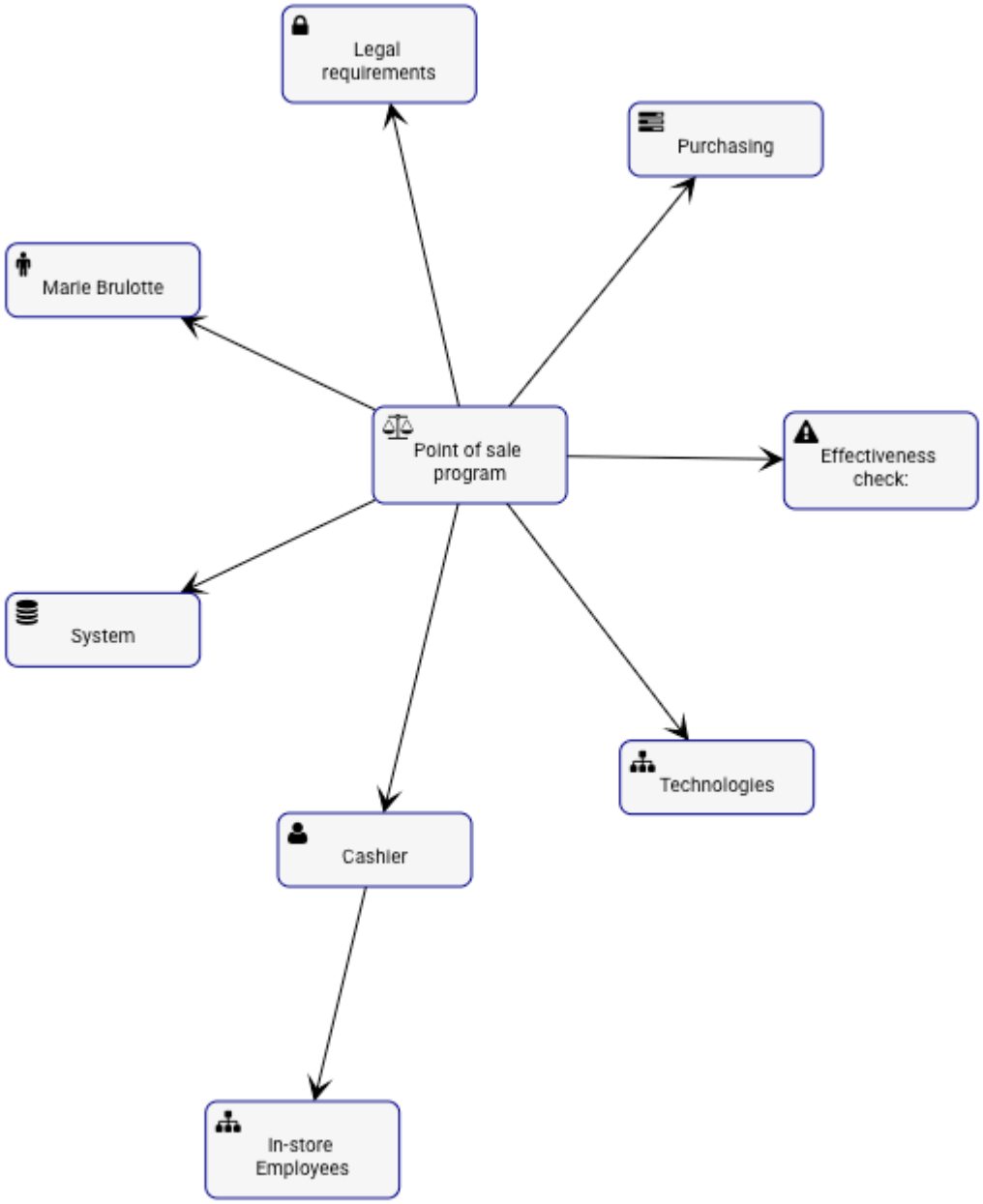
2. Click on the “Quick Graph View” icon

3. By default, a user will be navigated to the 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


Legal requirements
Purchasing
Marie Brulotte
Point of sale program
Effectiveness check:
System
Technologies
Cashier
In-store Employees

4.17.3.3 Hierarchy Graph

Hierarchy Graphs allows users to view the vertical and horizontal hierarchy of Capabilities and Capability Sets. This view provides users with a graphical representation of where specific capabilities fit within the overall organization. This allows organizational users to understand organizational Capabilities and gauge complexity of business activities.

Hierarchy Graph Navigation

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

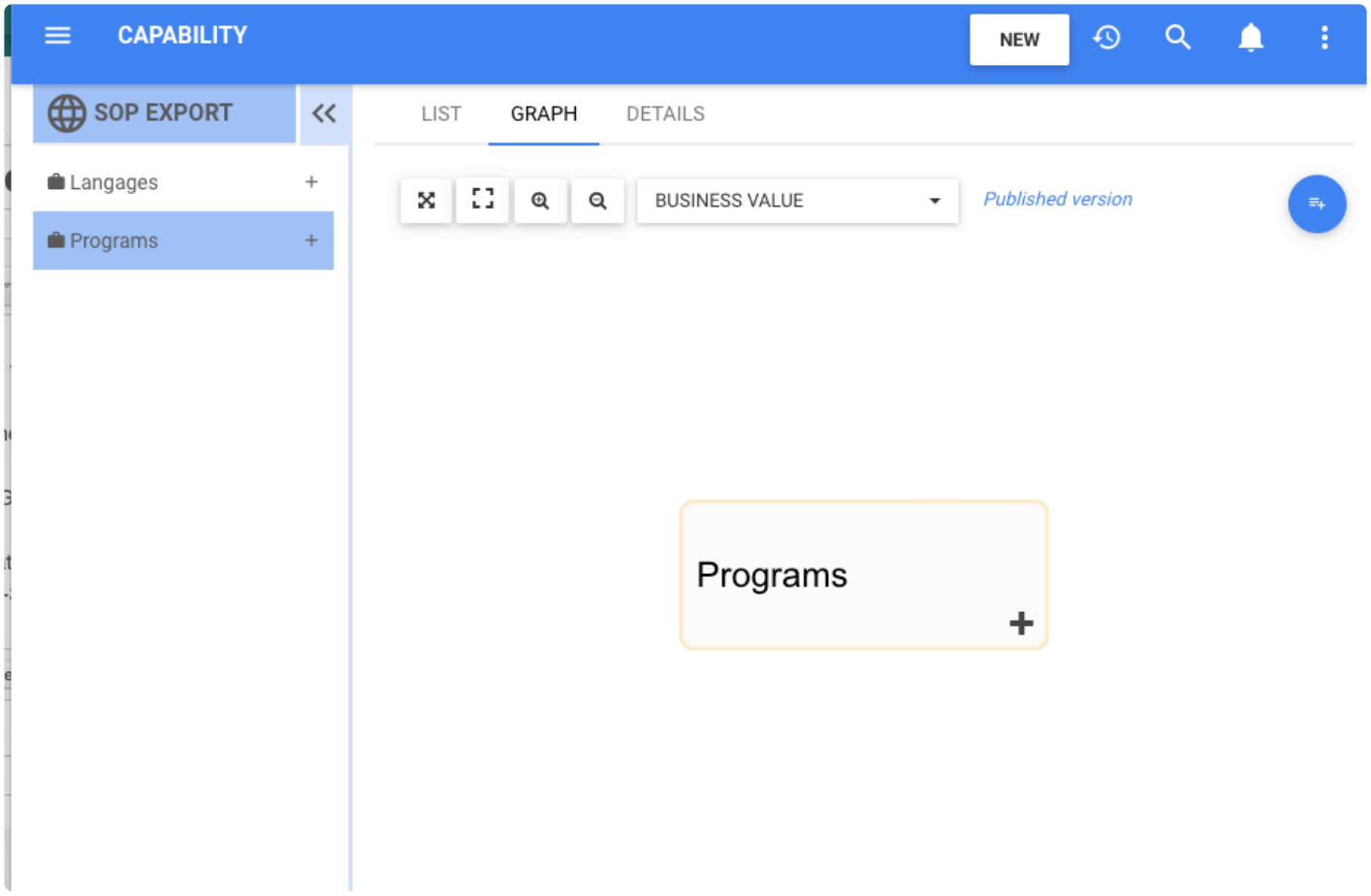
1. Navigate to the Capability Module

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

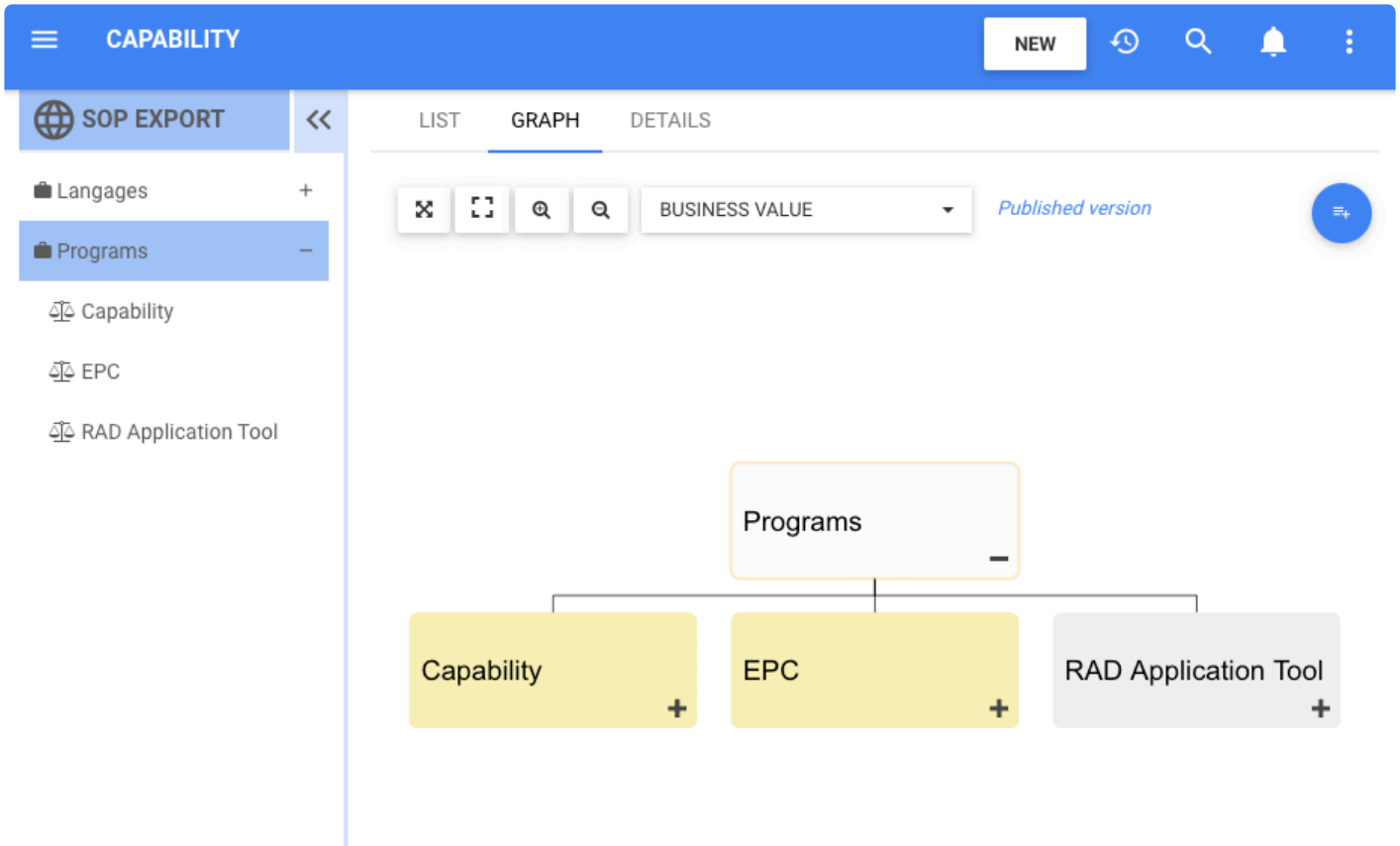
> The further you navigate, the more you limit the scope of Hierarchy Graphs. To view a complete picture of organizational structure, select items listed as “Capability Set” in List View.

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

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

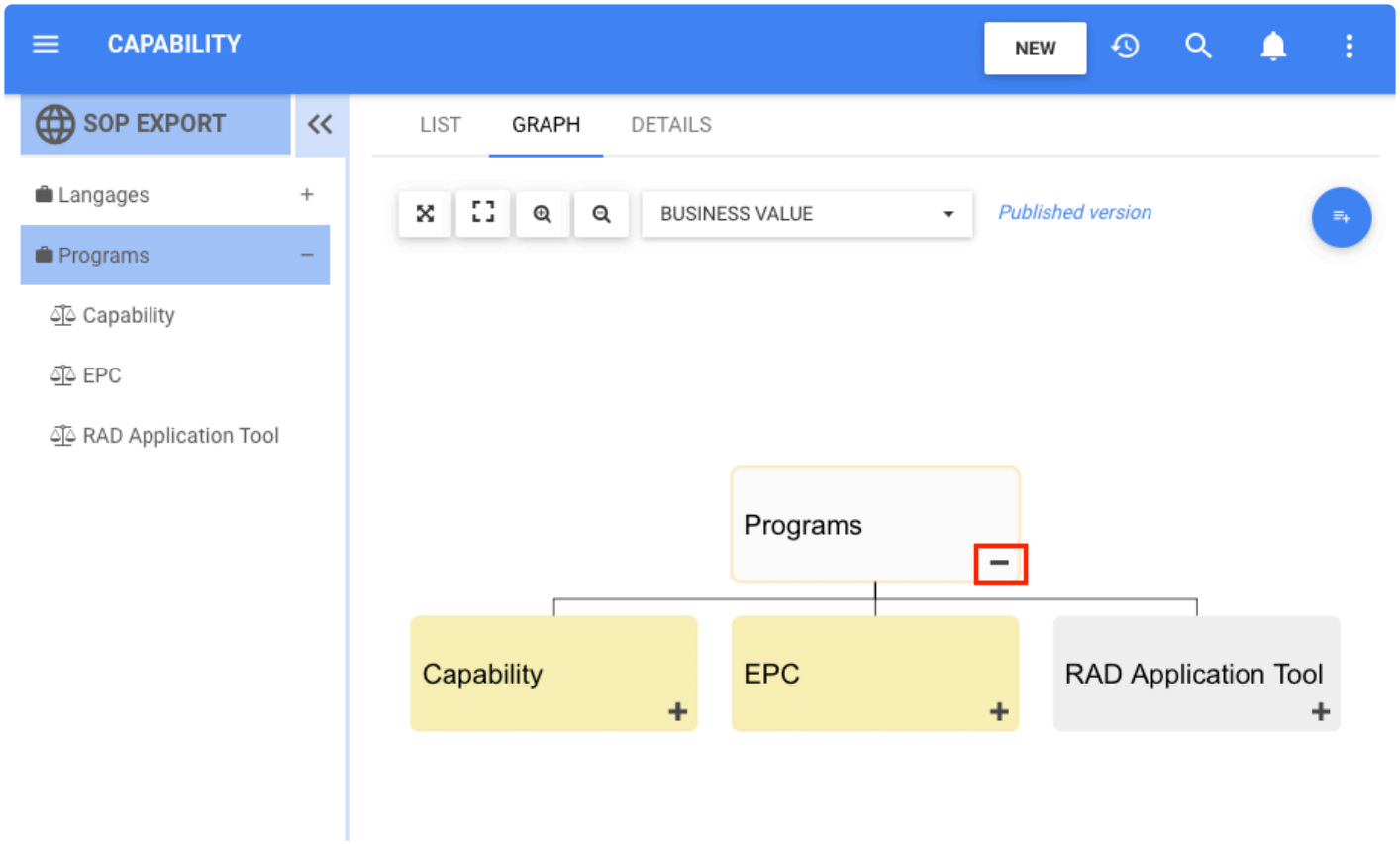


5. To further expand components of the Hierarchy Graph, double click on the on the objects in the Graph. This will expand the item selected.



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

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

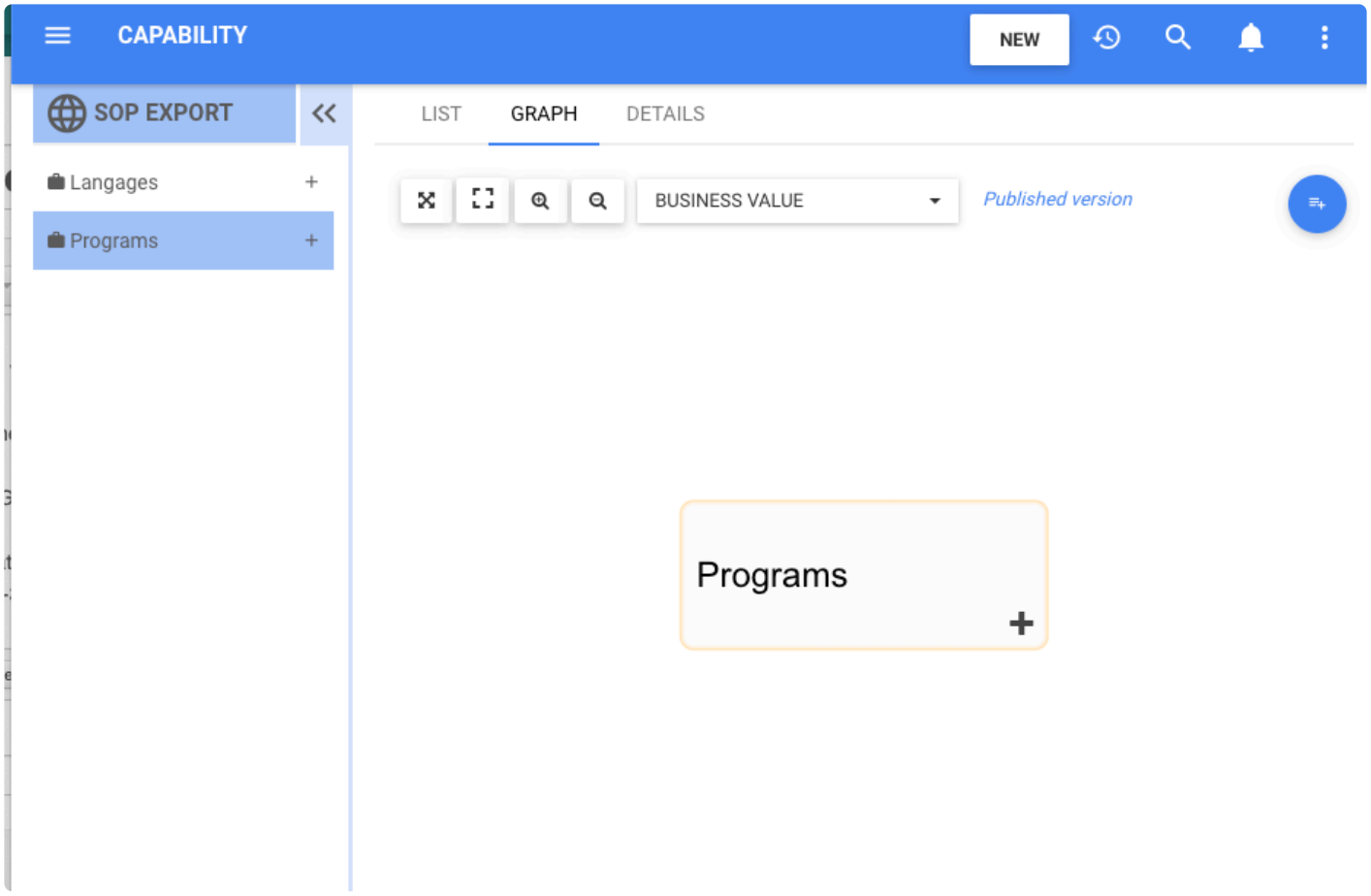


Hierarchy Graph Color Coding

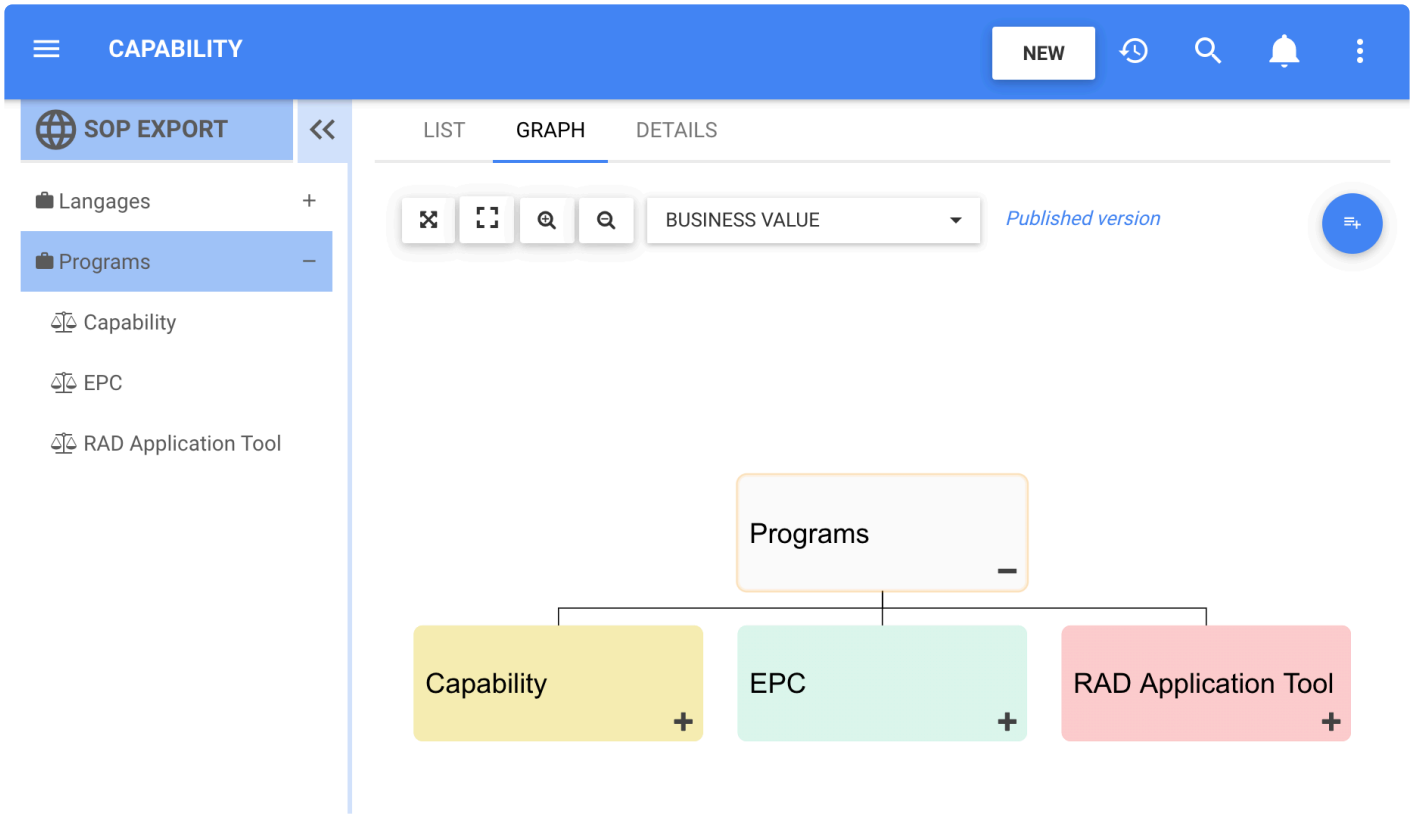
To further facilitate navigation between capabilities, a color system is available to users.

> ! To allow this color scheme to work, complete the Analysis tab of each Capabilities.

1. Navigate to the Hierarchy graph of the desired Capability or Capability Set.



2. In this example, we have chosen to start from a set of capabilities. To take full advantage of the color system, it is preferable to have a developed graph, with several capabilities on your screen, as follows:



3. By default, the color code for BUSINESS VALUE is displayed. by clicking on

, there will be a menu that will allow you to change to IMPORTANCE TO STRATEGY or TECHNICAL HEALTH.

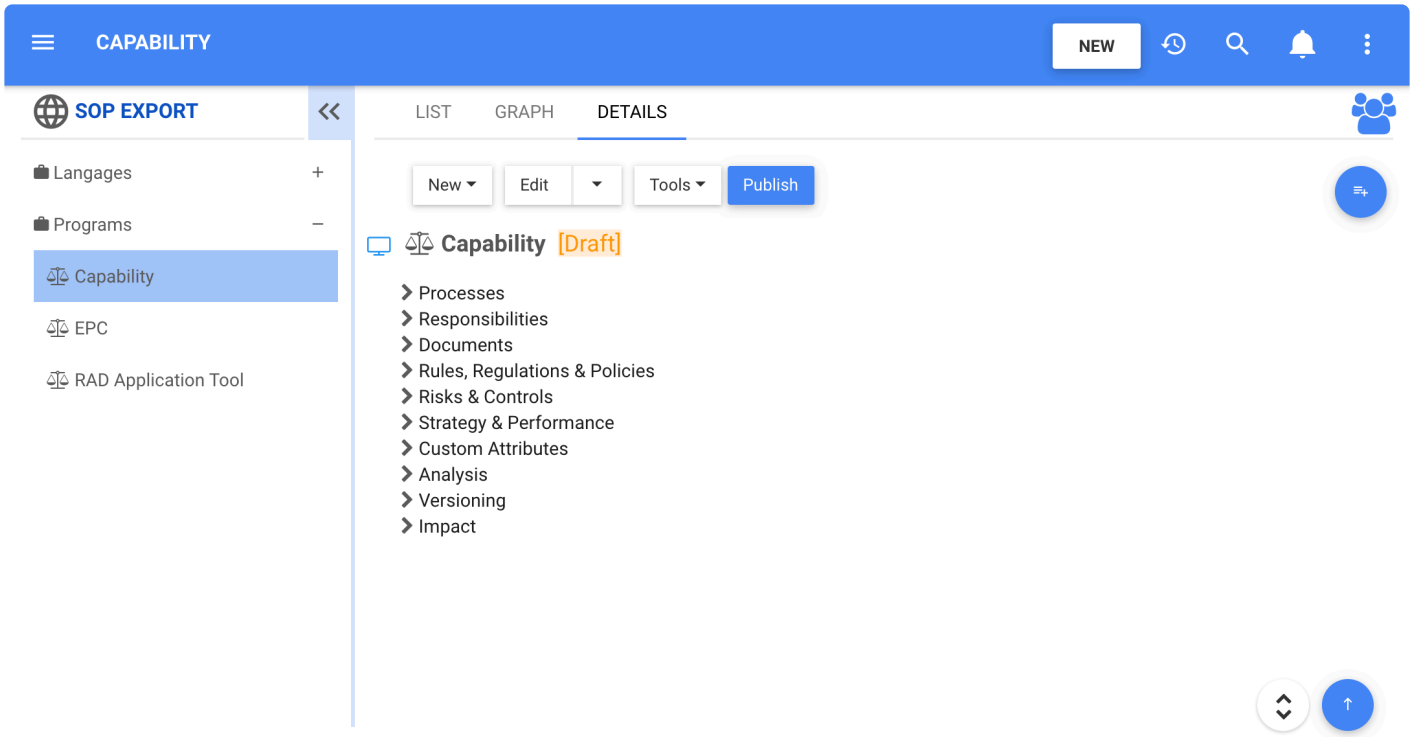
Here's what the color code means:

	Grey	Red	Yellow	Green
Business Value	Undefined	Below average	Average	Above average
Technical Health	Undefined	Low	Medium	High
Importance to Strategy	Undefined	Not Important	Important	Very Important

4.17.4 Details

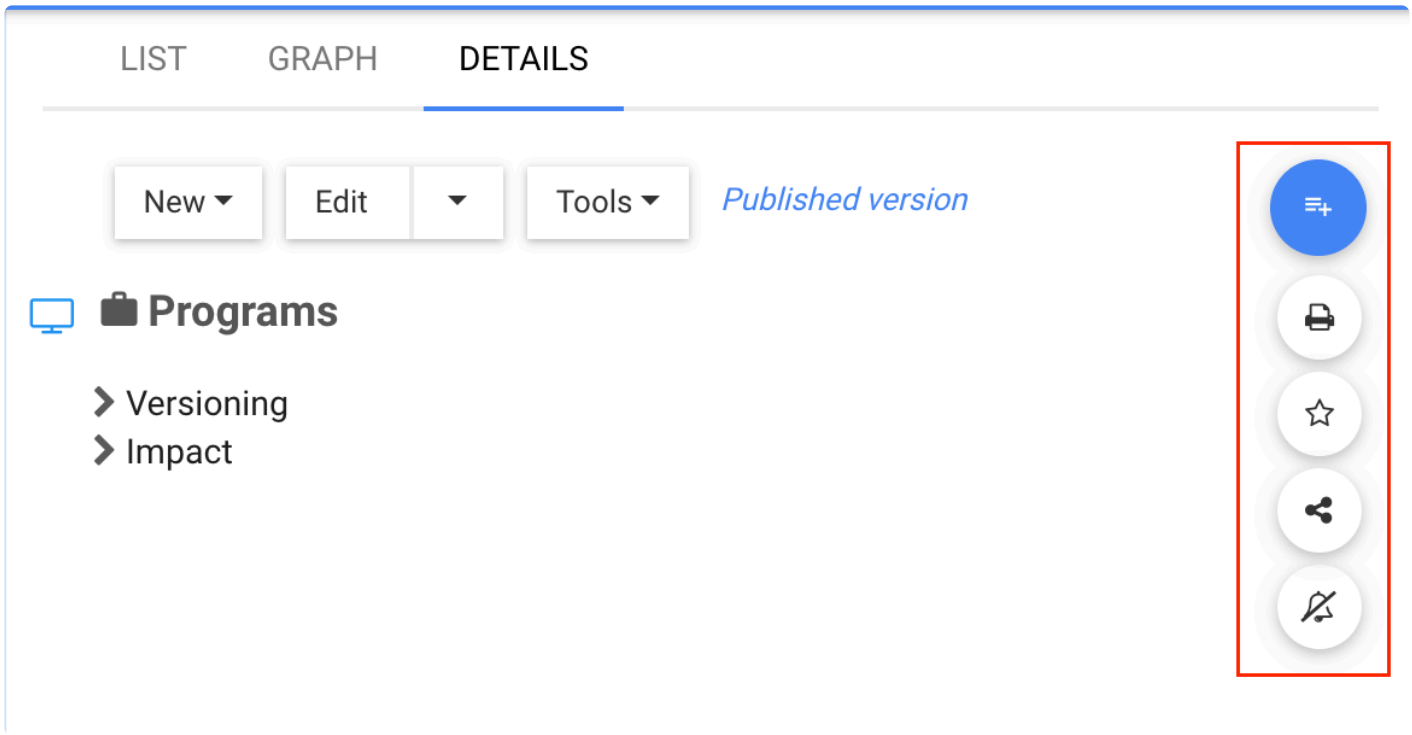
The Details section is where you will find details about the capabilities you are observing. This rich text area allows for the display of all additional details that has been uploaded regarding the item in particular. These details provide users with all critical information about items that has been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

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



4.17.4.1 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
Favorite		Allows users to sort by favorites in the “My Actions” widget
Share		Copies URL to user’s clipboard to share
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.

4.17.4.1.1 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.

4.17.4.1.2 Favorite

The favorite function, symbolized by the ☆ icon, has been added to track to items, objects and processes in the EPC into a user's Homepage under the "My Actions" widget.

Simply click on the favorite icon, and the object will be found in the Homepage "My Actions" widget.

4.17.4.1.3 Share

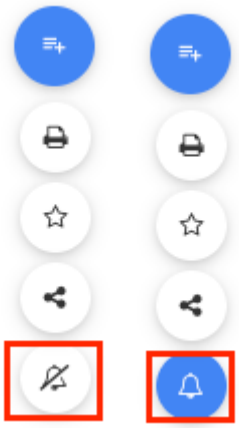
The share function, symbolized by the icon, has been added to copy links to items, objects and processes in the EPC.

Simply click on the share icon, and the URL will be copied to your clipboard.

4.17.4.1.4 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 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 .



4.17.4.2 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 Capability or Capability Set, and provides users with a specific destination that can be used to see and gather all relevant information.

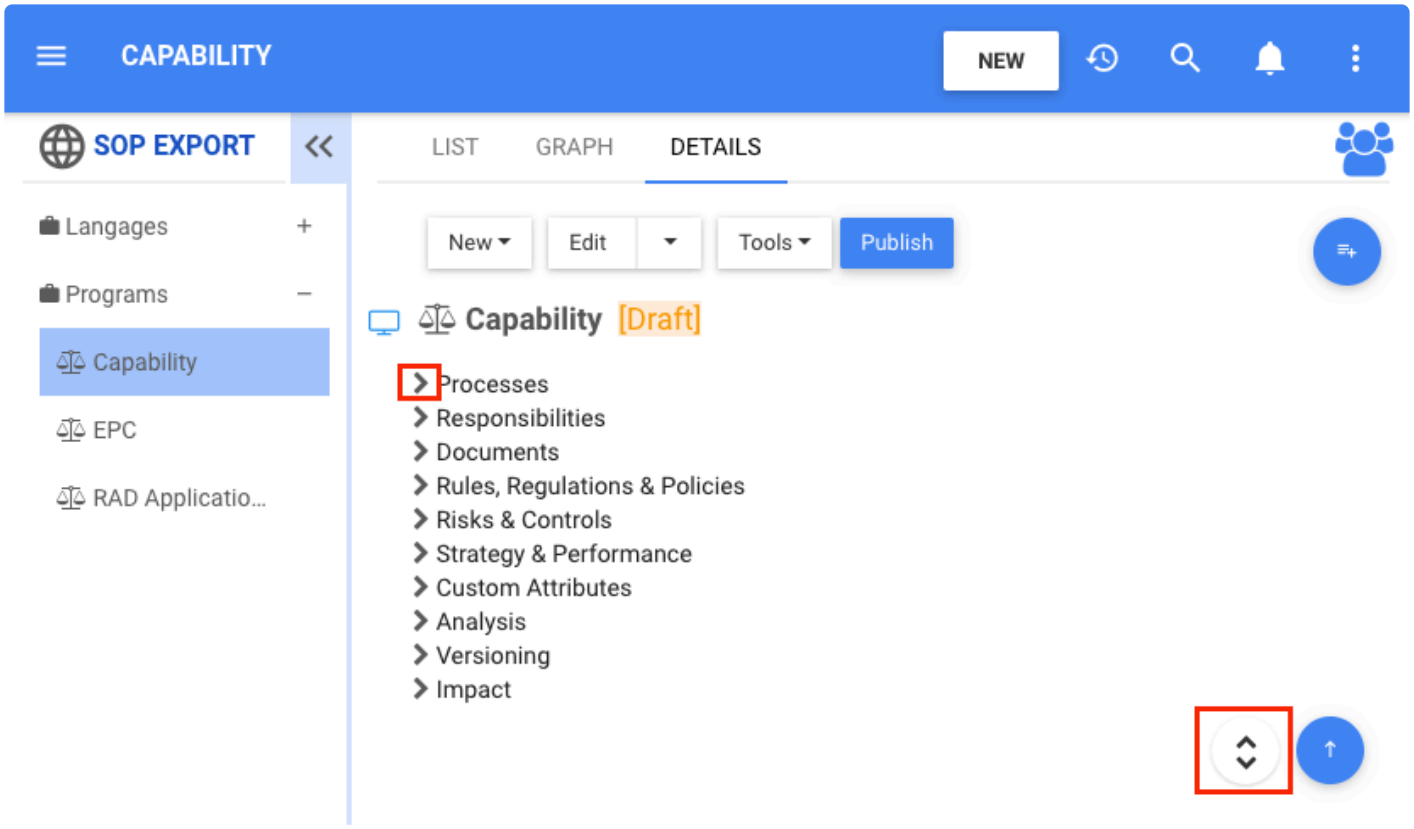
Capability Details displays the following content:

- Processes
- Responsibilities
- Documents
- Rules, Regulations & Policies
- Risks & Controls
- Strategy & Performance
- Custom Attributes
- Analysis
- Versioning
- Impact

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

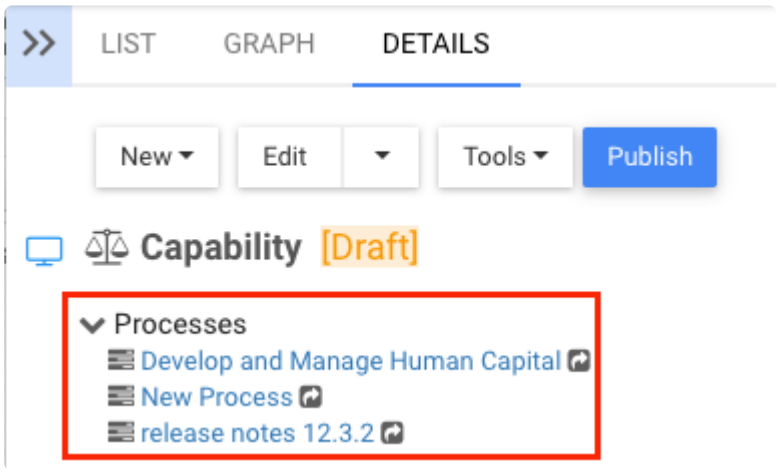


Selecting different items will result in different information being displayed. The above components specifically relate to the information that will be provided for items.

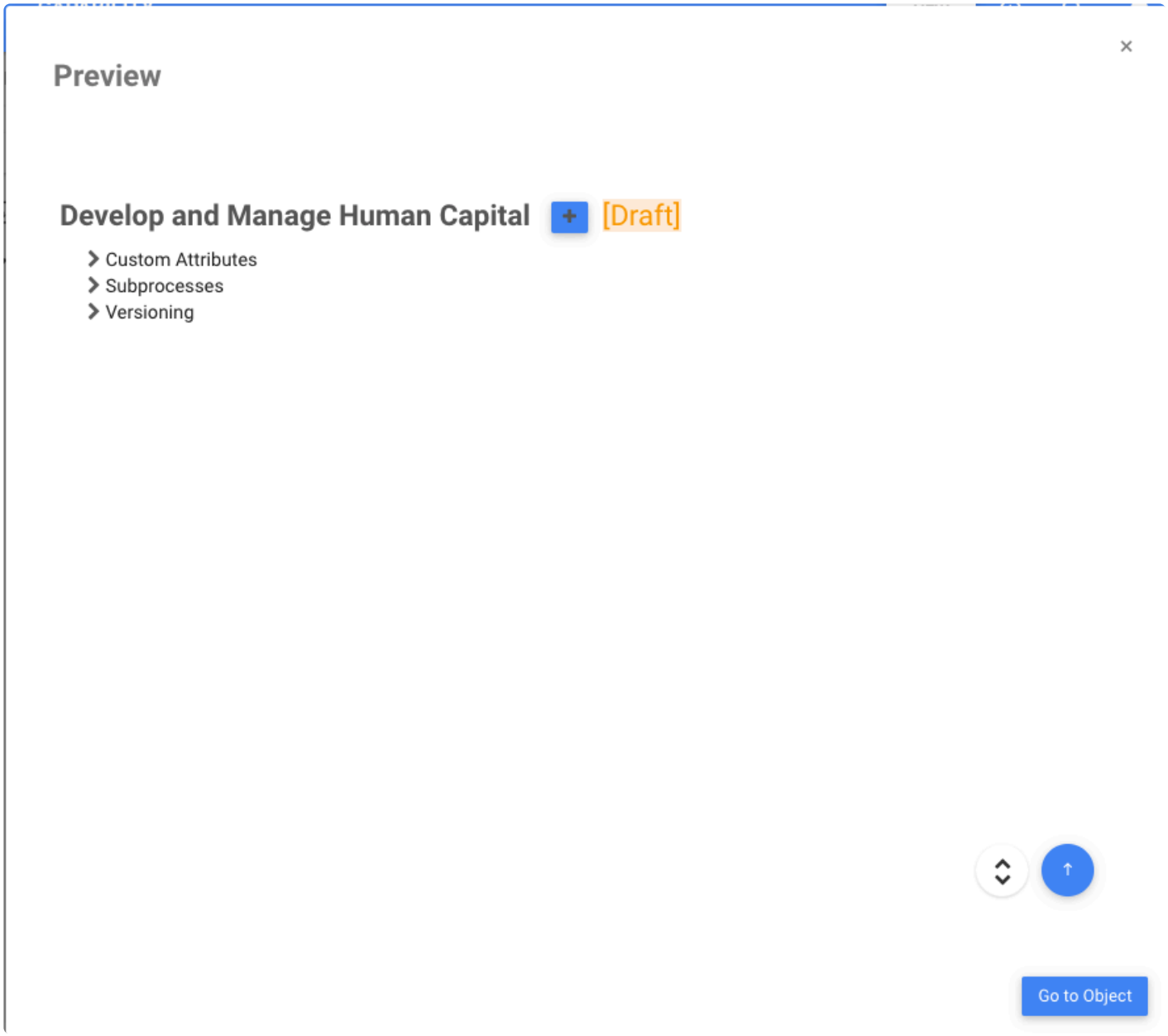
The details page ONLY populates details that are specific to each item. For example, if a document is tied to a task, it will only appear in the details page of the task and not in the details page of the organization. Users must navigate to the specific item they wish to obtain its full set of details

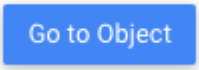
4.17.4.2.1 Processes

The Processes section shows every process that is associated to the capability. A link to preview the process is attached to every process name shown.



When you click on a process link, a pop-up window will appear:



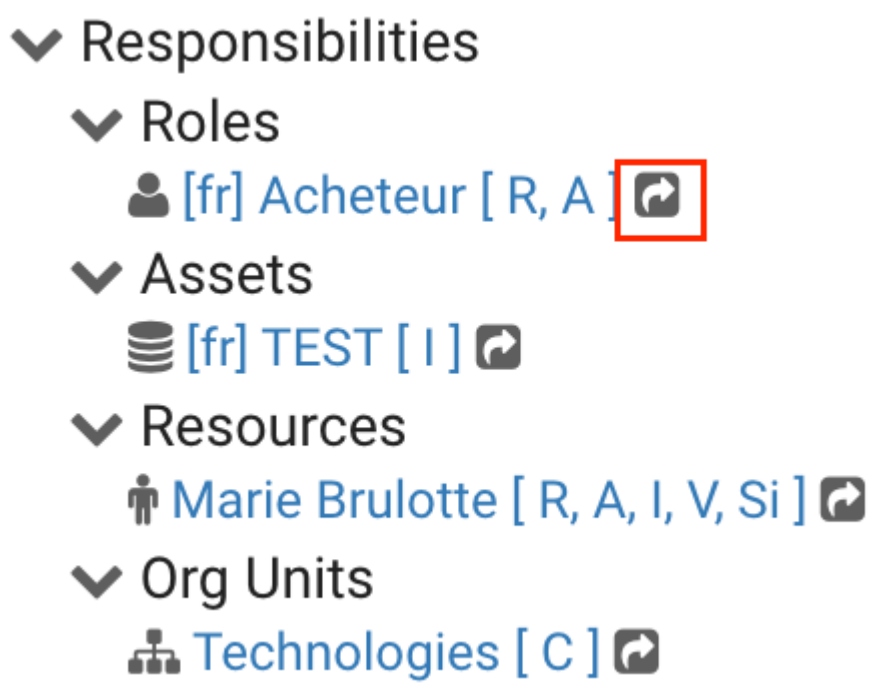
To go to the process, click the 

button.

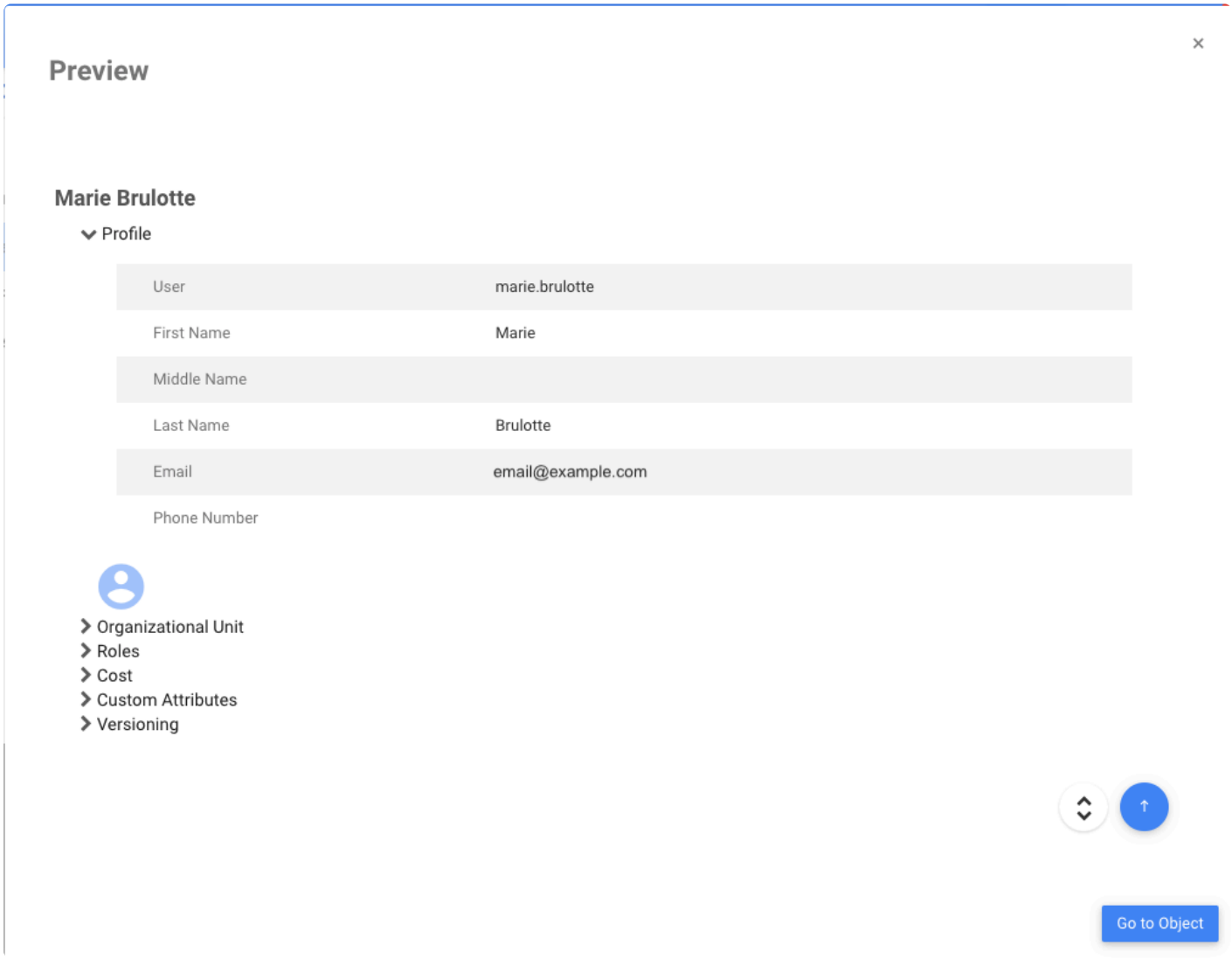
4.17.4.2.2 Responsibilities

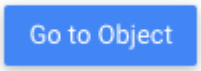
The Responsibilities section displays de roles, resources, org units and/or assets that are responsible for the capability you are viewing. This provides additional details about any associated object that has been tied to the item using the RASCI-VS matrix.

To navigate directly to the object, click on the icon.



Users can click on the object's name to view its details in a popup. For this exemple, we opened the preview for the Resource.



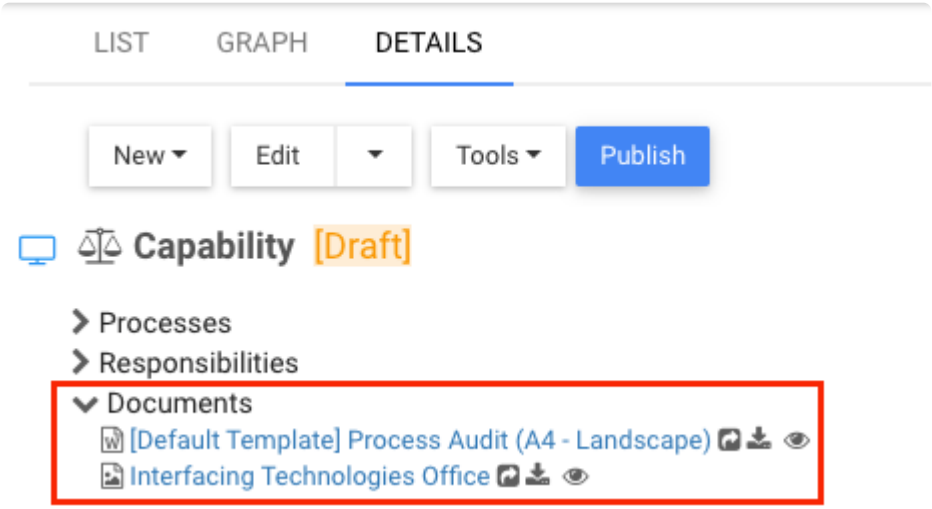
To go to the object's detail page, click on the 

button

4.17.4.2.3 Documents

This section lists all documents that have tied to the Capability 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.)

To navigate directly to the object, click on the icon.



Users can also preview and download the document:

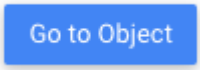
1. **Preview**: To preview the document click on the icon. Please see list below for file types supported by Preview functions.

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

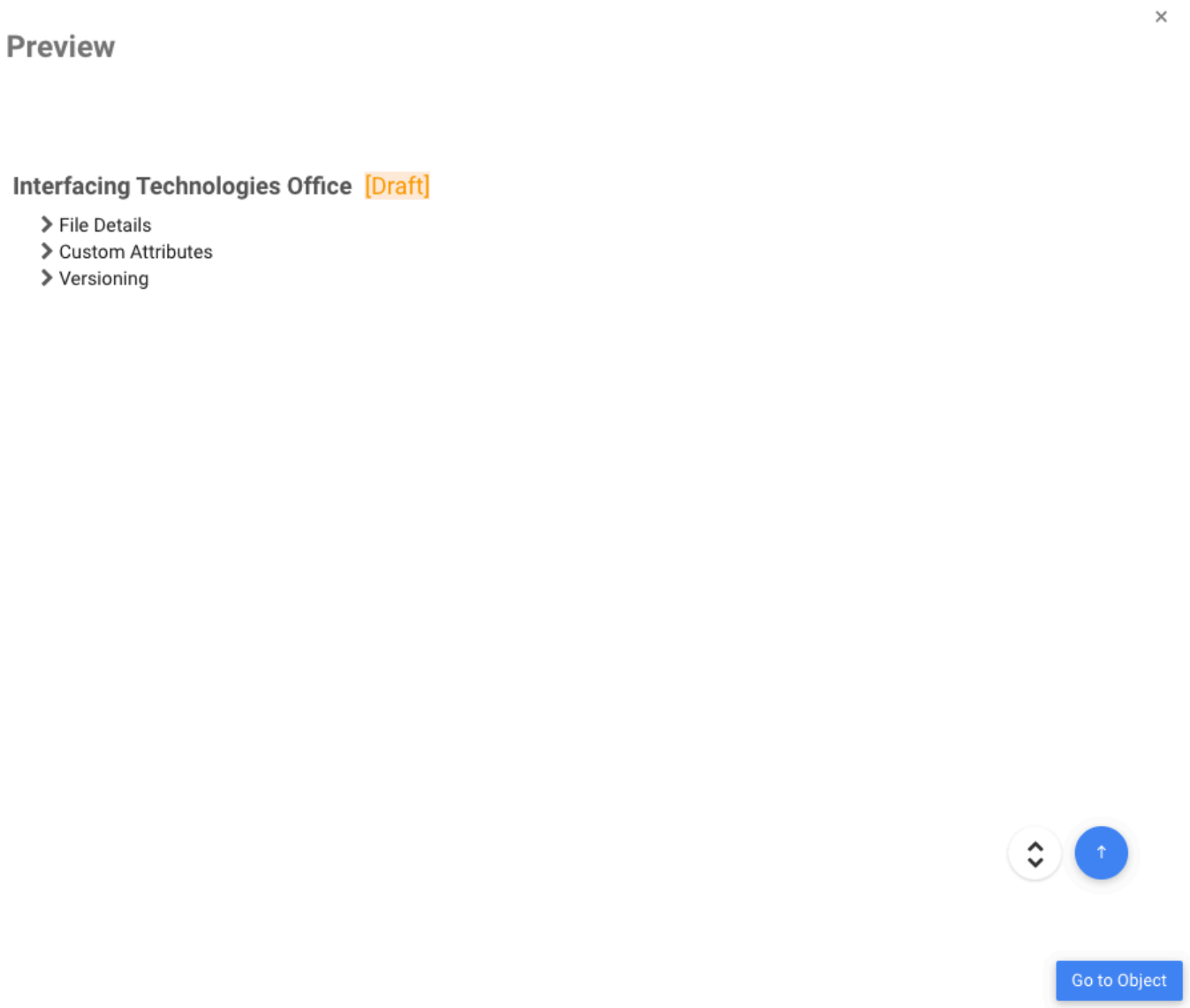
PDF Files	Available with extension Adobe Acrobat	Available with extension Adobe Acrobat	Available with extension Adobe Acrobat	Available with extension Adobe Acrobat	Available with extension Adobe Acrobat
Image Files • Png • Jpeg, jpg	Available (all)	Available (all)	Available (all)	Available (all)	Available (all)

• Gif • Svg, svgz • Tif, tiff • 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

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

Users can click on the object's name to view its details in a popup. To navigate to the object's detail page, click on the 

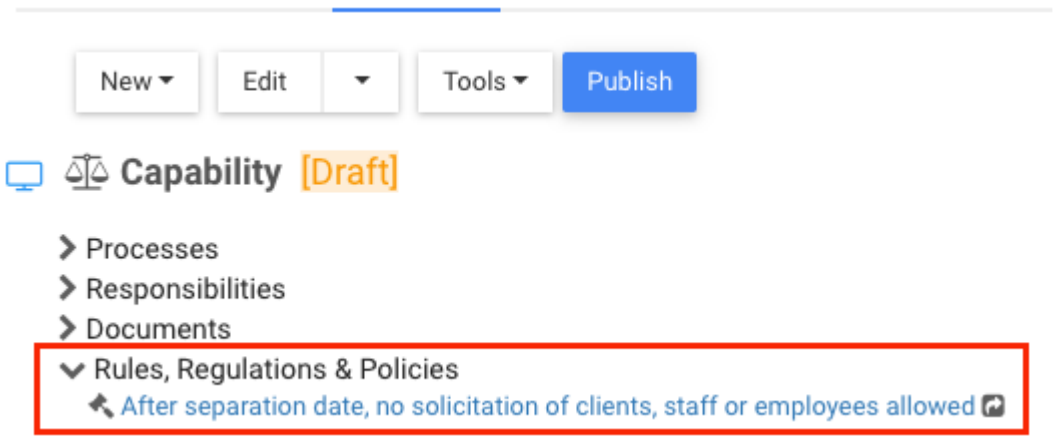
button


Preview
Interfacing Technologies Office [Draft]
File Details
Custom Attributes
Versioning
Go to Object

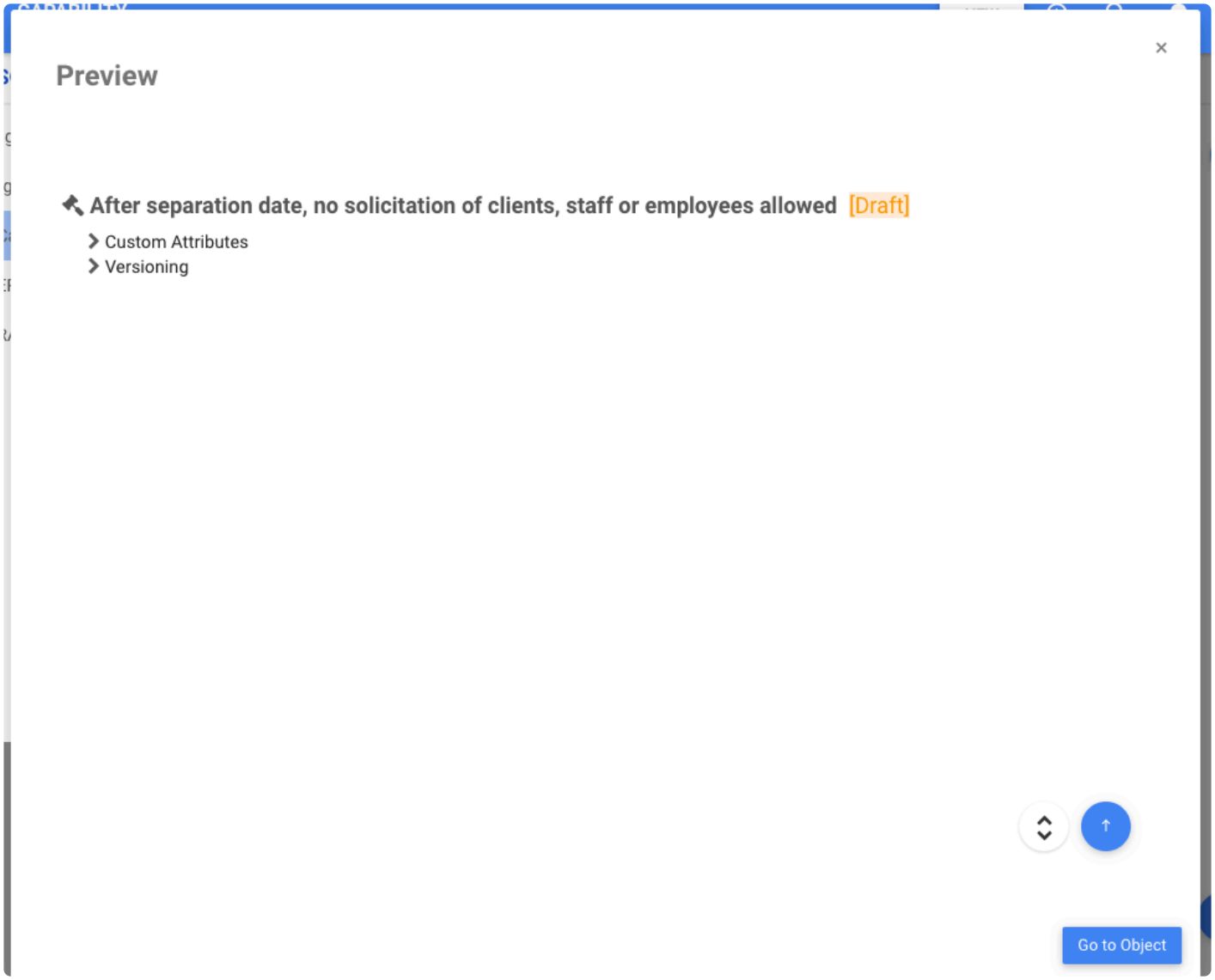
4.17.4.2.4 Rules, Regulations & Policies

The Rules, Regulations & Policies section displays any additional lower level rule that is associated to a higher level rule.

To navigate directly to the object, click on the icon.



Users can click on the object's name to view its details in a pop-up. To navigate to the object's detail page, click on **Go To Object**

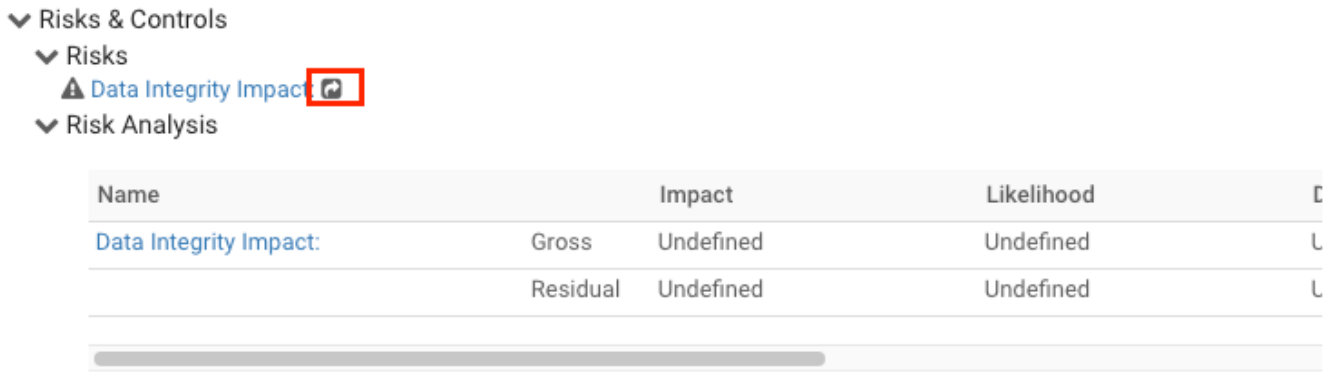

Preview
After separation date, no solicitation of clients, staff or employees allowed [Draft]
Custom Attributes
Versioning
Go to Object

4.17.4.2.5 Risks & Controls

The risks & controls section displays any risk or control that is related to the specific capability you are viewing.

To navigate directly to the object, click on the icon.

The user can also view the Risk Analysis section, which shows the impact, the likelihood, the detectability, the priority, the score and the % of gross of each risk that is associated with the capability the user is viewing.



Users can click on the object's name to view its details in a popup. To navigate to the object's detail page, click on **Go To Object**

Preview

Data Integrity Impact: [Draft]

Identifier: 4.7.1

Description

The Lead Auditor ticks the box in AQWA A when an observation violates the ALCOA+ principles (Attributable, Legible, Contemporaneous, Original, Accurate, Complete, Available, Consistent, and Enduring). A comment must be added in the observation description field to identify which of the principles the observation is violating and to justify the observation rating.

Risk Profile

Controls

Custom Attributes

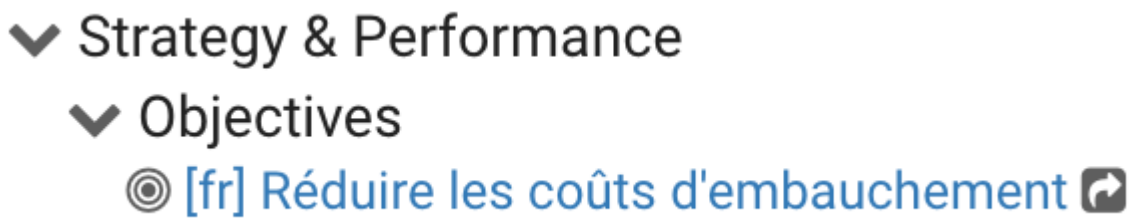
Versioning

Go to Object

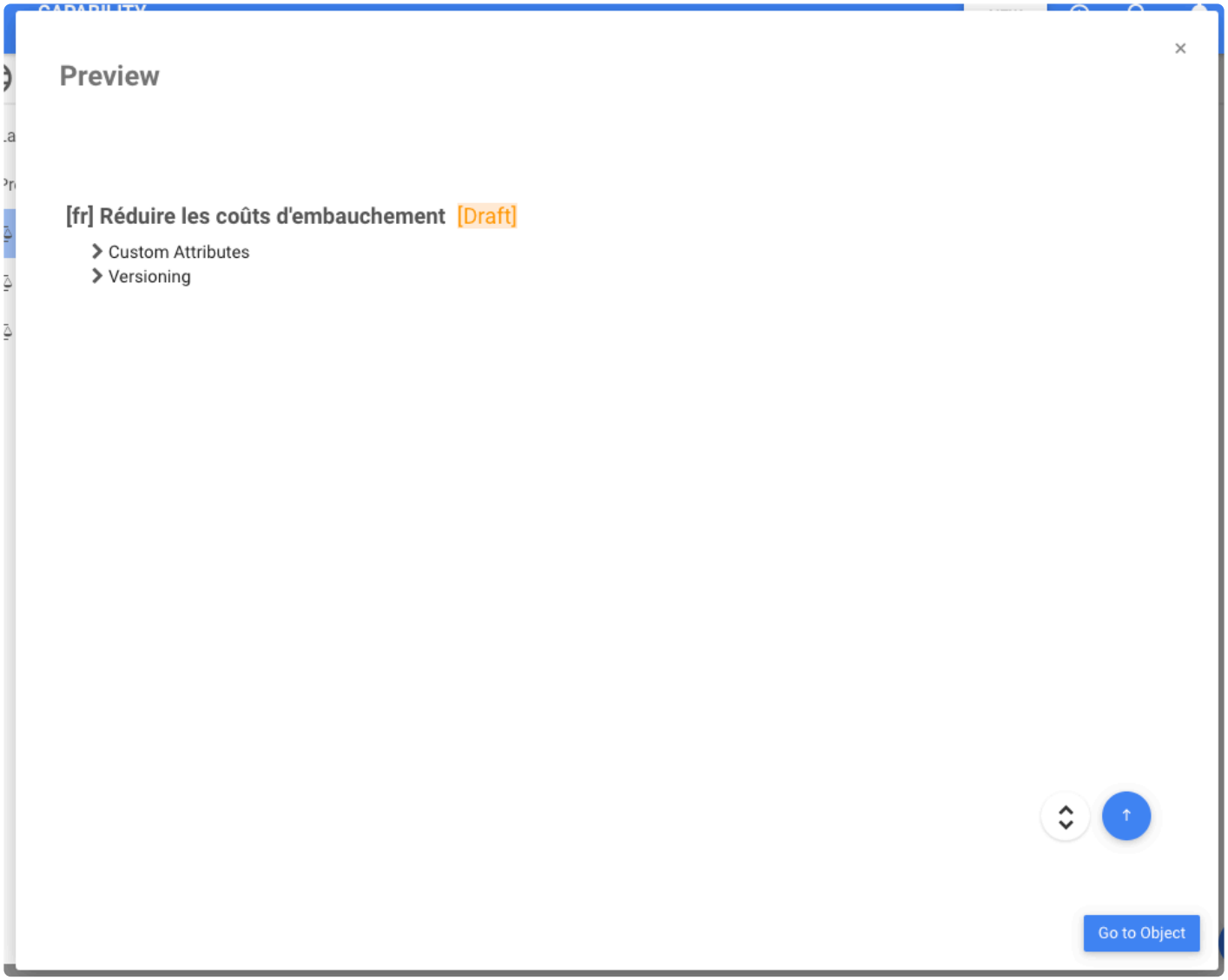
4.17.4.2.6 Strategy & Performance

The strategy and performance section displays all the Objectives that are associated with the capability you are viewing.

To navigate directly to the object, click on the icon.



Users can click on the object's name to view its details in a popup. To navigate to the object's detail page, click on **Go To Object**


Preview
[fr] Réduire les coûts d'embauchement [Draft]
Custom Attributes
Versioning
Go to Object

4.17.4.2.8 Analysis

The Analysis section provides information that better allows users to analyze items and related key details

This section contains:

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

The section is displayed as so:

Analysis

Status	Supported
Business Value	Average
Technical Health	Low
Importance to Strategy	Very Important
Competitive Positioning	Ahead

SWOT Analysis

Strengths	Weaknesses
Same Day Delivery	Costly State Laws To Oversee Delivery
High-Quality Foods	Can Operate At A Loss
Opportunities	**Threats**
Optimize Current Mobile App	Costly
	No Monthly Subscription Options
	Inaccessible To A Large Consumer

Maturity

Maturity Current Level	Next Maturity Target Date	Level 1 Target Date	Level 2 Target Date	Level 3 Target Date	Level 4 Target Date	Level 5 Target Date
1						

4.17.4.2.9 Versioning

The **Versioning** section provides users with additional key information about items. The section is broken down into two categories:

1.**Current Version**: Provides information about what version is being viewed, and when the latest modification has been made
2.**Version History**: Provides information on previous versions of the process. Includes major and minor versions, status, published comment, author and date.

Versioning
Current Version
Version Number: 0.0009
Last Modified: 6 days ago
Version History

Version Number	Status	Published Comment	Author	Date
0.0009	In Progress		Marie Brulotte (marie.brulotte)	June 29, 2021 4:48 PM
0.0008	In Progress		Marie Brulotte (marie.brulotte)	June 29, 2021 4:31 PM
0.0007	In Progress		Marie Brulotte (marie.brulotte)	June 29, 2021 4:12 PM
0.0006	In Progress		Marie Brulotte (marie.brulotte)	June 29, 2021 3:59 PM
0.0005	In Progress		Marie Brulotte (marie.brulotte)	June 29, 2021 3:47 PM
0.0004	In Progress		Marie Brulotte (marie.brulotte)	June 29, 2021 3:37 PM
0.0003	In Progress		Marie Brulotte (marie.brulotte)	June 29, 2021 2:37 PM
0.0002	In Progress		Marie Brulotte (marie.brulotte)	June 29, 2021 2:35 PM
0.0001	In Progress		Marie Brulotte (marie.brulotte)	June 29, 2021 2:34 PM

© 2020 Interfacing Technologies Corporation

4.17.4.2.10 Impact

The Impact section allows users to view the impacts an object has on others in a list form. It is a complement to the Impact Graph, and another way of visualizing impact data.

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 to the object. Impacts 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.

> The impact list will only show **direct** impacts, as opposed to the impact graph, which can be expanded to show **indirect** impacts on an object

> To sort a column by alphabetical order, click on it's header. The arrow pointing up indicates sorting in **Ascending Order**, the arrow pointing down indicates sorting in **Descending Order**, and no arrow indicates **No Sorting**.

Object Name A	Parent B	Object Type C	Assignment Type D	Justification E	Impact Type F	Status G
[Default Template] Analysis (A4 - Lands...	Default template folder	Document	Directly Impacts		Association	Published
Document should be reviewed every yea...	Import Folder	Rule	Directly Impacts		Association	Published
Enforce a zero-tolerance policy for dang...	Import Folder	Control	Directly Impacts		Association	Published
Onboarding cost	Imported Objective	KPI	Directly Impacts		Association	Published
Ratio of candidates to hires	Imported Objective	KPI	Directly Impacts		Association	Published
Risk B - with risk analysis!	Import Folder	Risk	Directly Impacts		Association	Published
Warehouse	Imported Measure Set	Objective	Directly Impacts		Association	Published

A	Object Name	The Name of the object. Click on the hyperlink to go to the object
B	Parent	The Parent of the object
C	Object Type	The type of the object
D	Assignment Type	The relationship type between the two objects
E	Justification	The justification of the object
F	Impact Type	How does this object impact the current object
G	Status	The status of the object (In Progress or Published)

> NOTE: If you expand a process in order to see its sub-items (the "+" sign located to the left of the name of the process), the impact list will NOT be available for sub-items. to view the

impact of the sub-item, you must directly navigate to the sub-item.

Suggested Impacts

Users are able to view the suggested impacts an object in a list form in the Details view. They are presented in descending order of confidence level starting from the most possibly impacting object to the 10th least.

Object Name A	Parent B	Object Type C	Status D	Confidence Level % E
Participants Background	VBM	Process	In Progress	50 - 75
Obtain candidate background information	Manage applicant information	Process	Published	10 - 25
"Perform a background check	new folder	Control	Published	10 - 25
sop template no background image	0	Document	In Progress	10 - 25
Copy of test copy	Rosario	Process	In Progress	0 - 10
Copy of Goods	Copy of objective-01	Objective	In Progress	0 - 10
Copy of Copy of 11531-name4	VBM	Process	In Progress	0 - 10
Copy of Goods	Copy of objective-01	Objective	In Progress	0 - 10
Copy of Goods	Copy of objective-01	Objective	In Progress	0 - 10

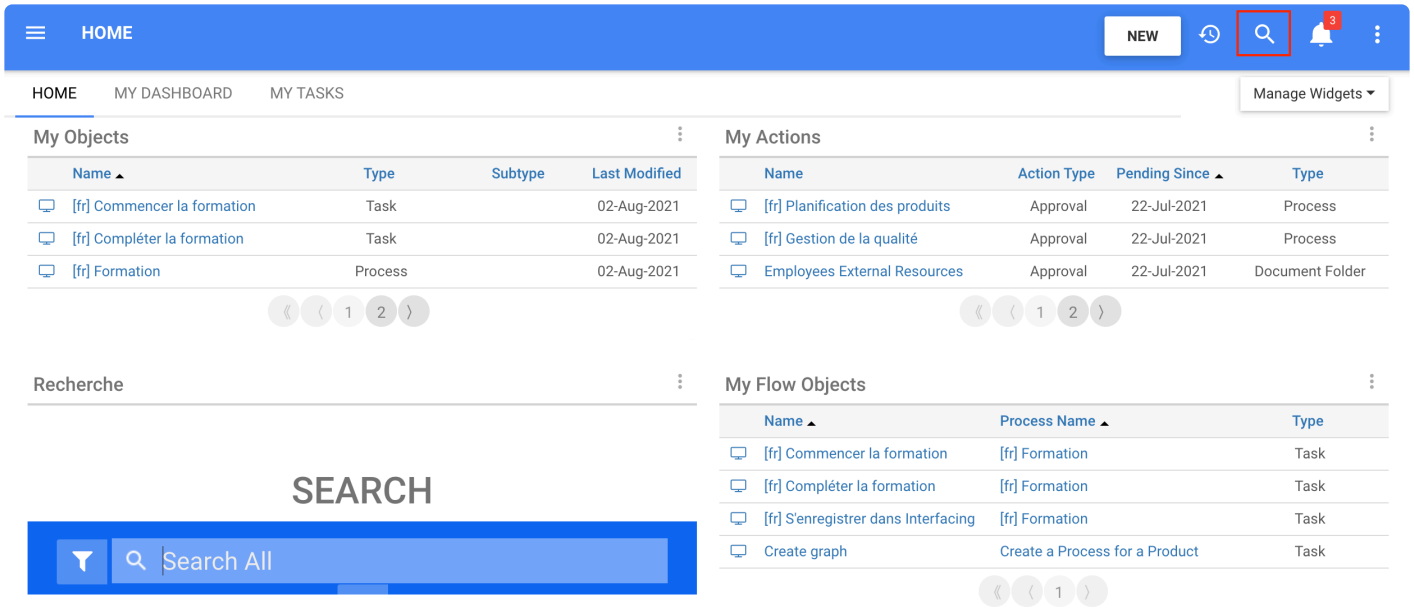
A	Object Name	The Name of the object. Click on the hyperlink to go to the object
B	Parent	The Parent of the object
C	Object Type	The type of the object
D	Status	The status of the object (In Progress or Published)
E	Confidence Level	The confidence level the object has a possible impact

4.17.5 Search Capabilities

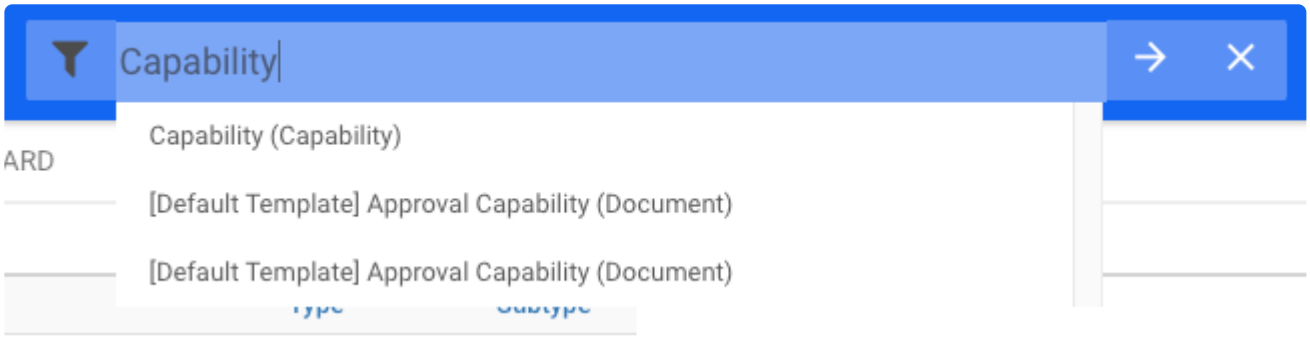
Searching for a Capability with the search bar allows the user to quickly navigate to the desired Capability. The user is able to search by name & description.

To use this feature, please follow to steps below:

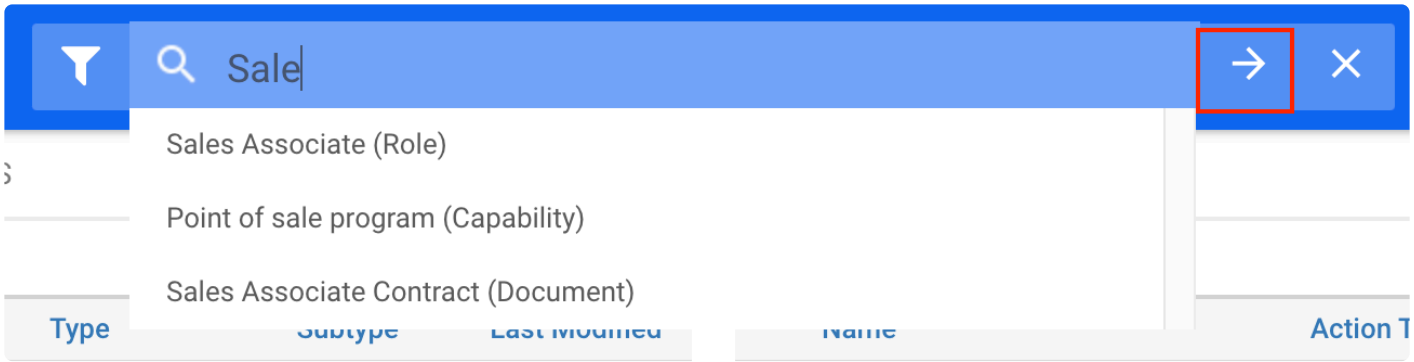
1. Click on the search button at the top right of your screen.



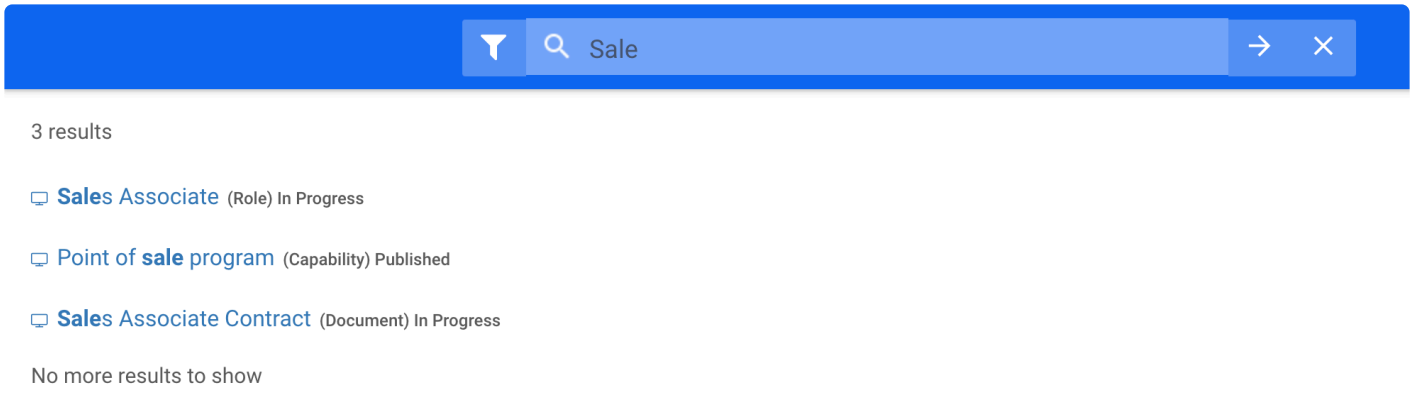
2. Type the name or description of the desired capability.



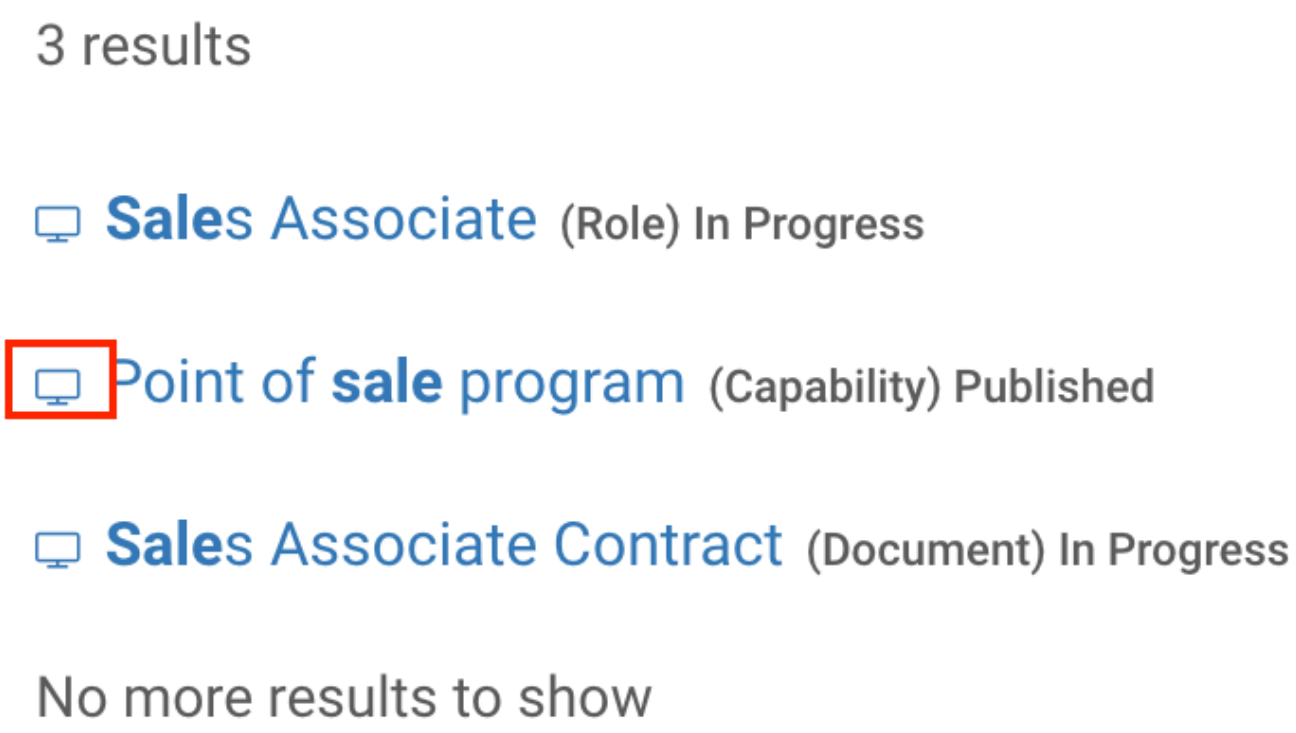
3. Click enter or the search button.



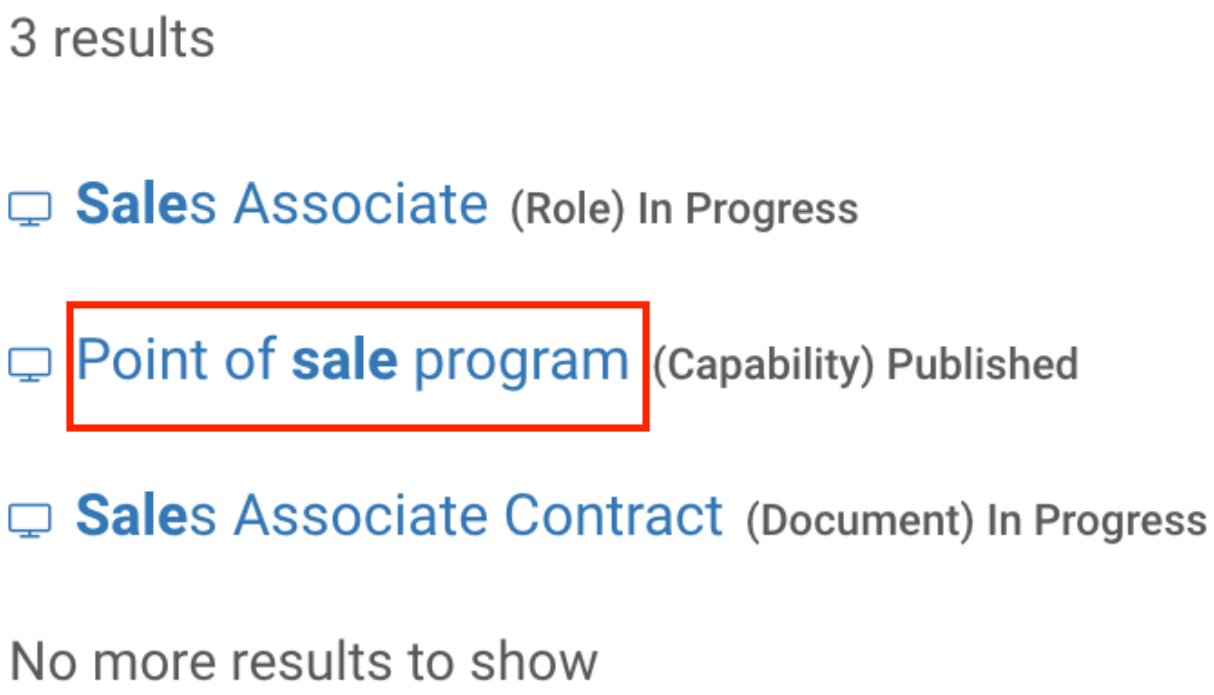
4. EPC will find the best matching results.



5. The user has the option to click on the quickgraph icon to be redirected to the graph page.



6. To be redirected to the Details page of the Capability, click on the name.



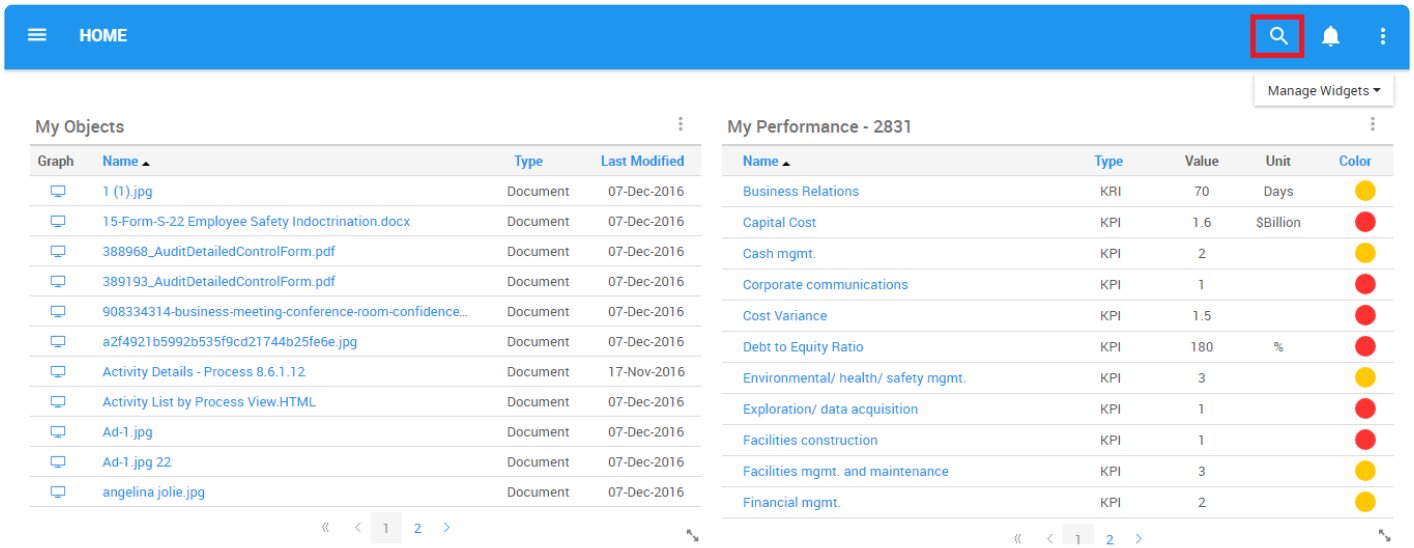
5.0 Search

Users can leverage EPC's search function to easily find items within the Web App. The search function, represented by the icon allows users to search through all uploaded items to which they have access to. This search function should be used when a user is searching for a specific item or key word.
Similar to typical internet searches, the EPC prioritizes search results based on how well the items match the item being searched.

The search results follow this hierarchy:

1. If the name being searched is featured in the title of the item
2. If the name being searched is featured in the details and description of the item
3. If the name being searched partially matches other key words within item names or descriptions

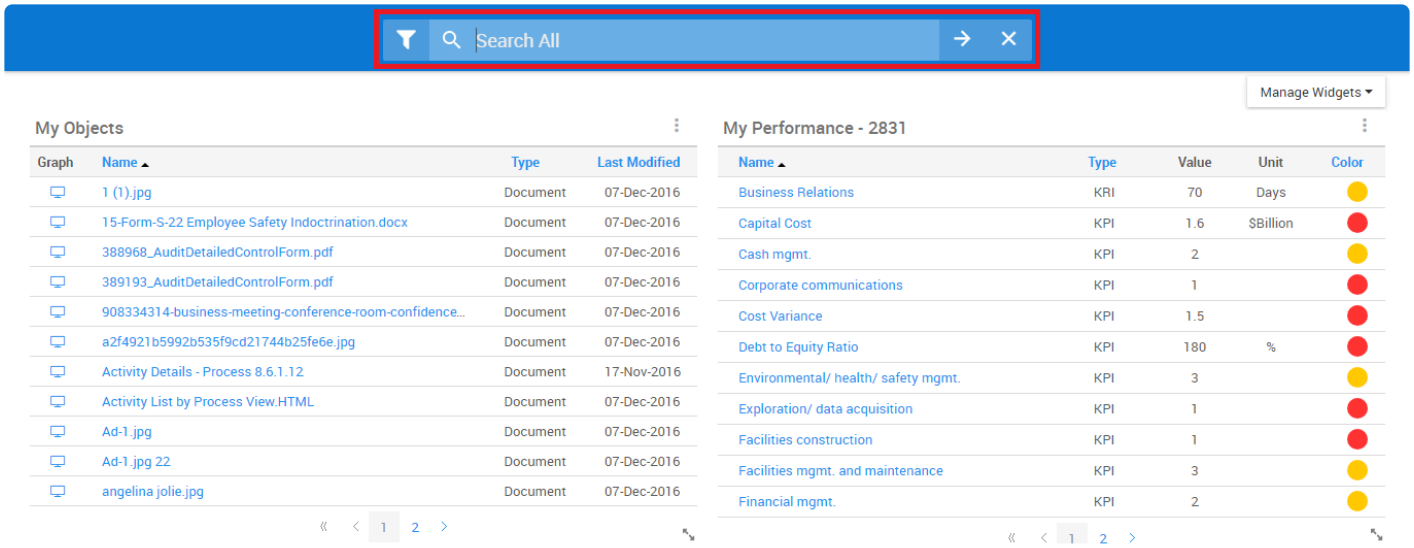
Using the Search Bar
The search bar can be accessed from any module or section of the EPC. The search icon will be displayed at the top of each page, and can be found at the upper right hand side of users' pages.



To use the search function, please see the steps below:

1. Navigate your cursor to the search icon displayed at the top of the page

2. Click on the icon and a search bar will generate

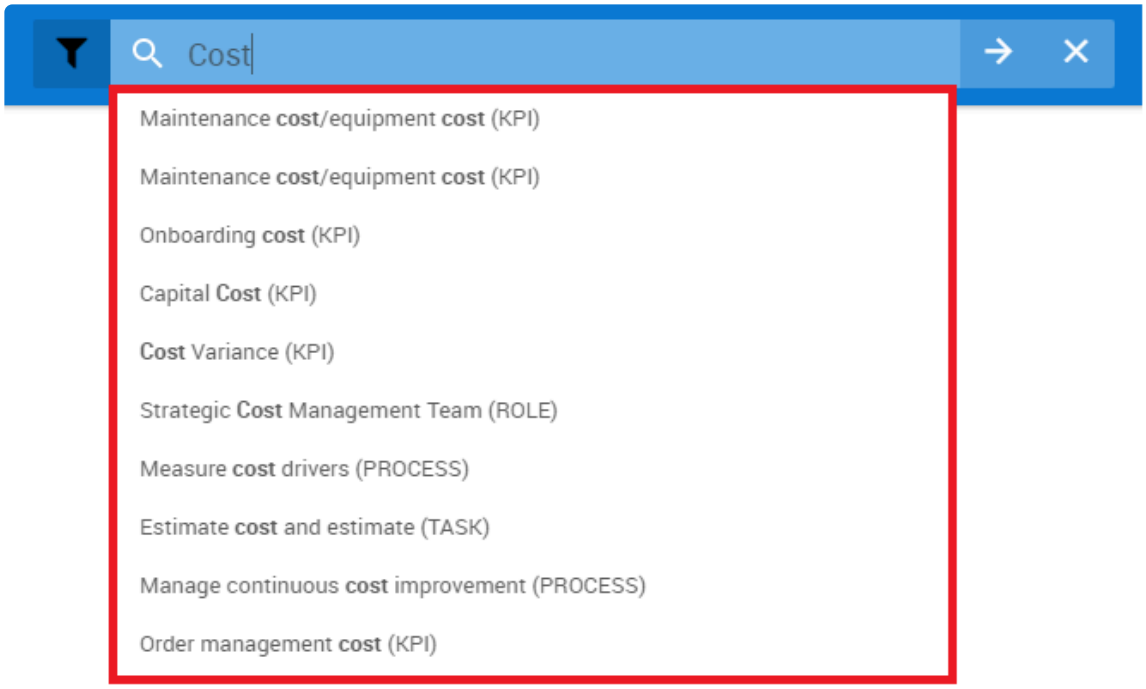


The search bar will display 3 buttons that the user can utilize:

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

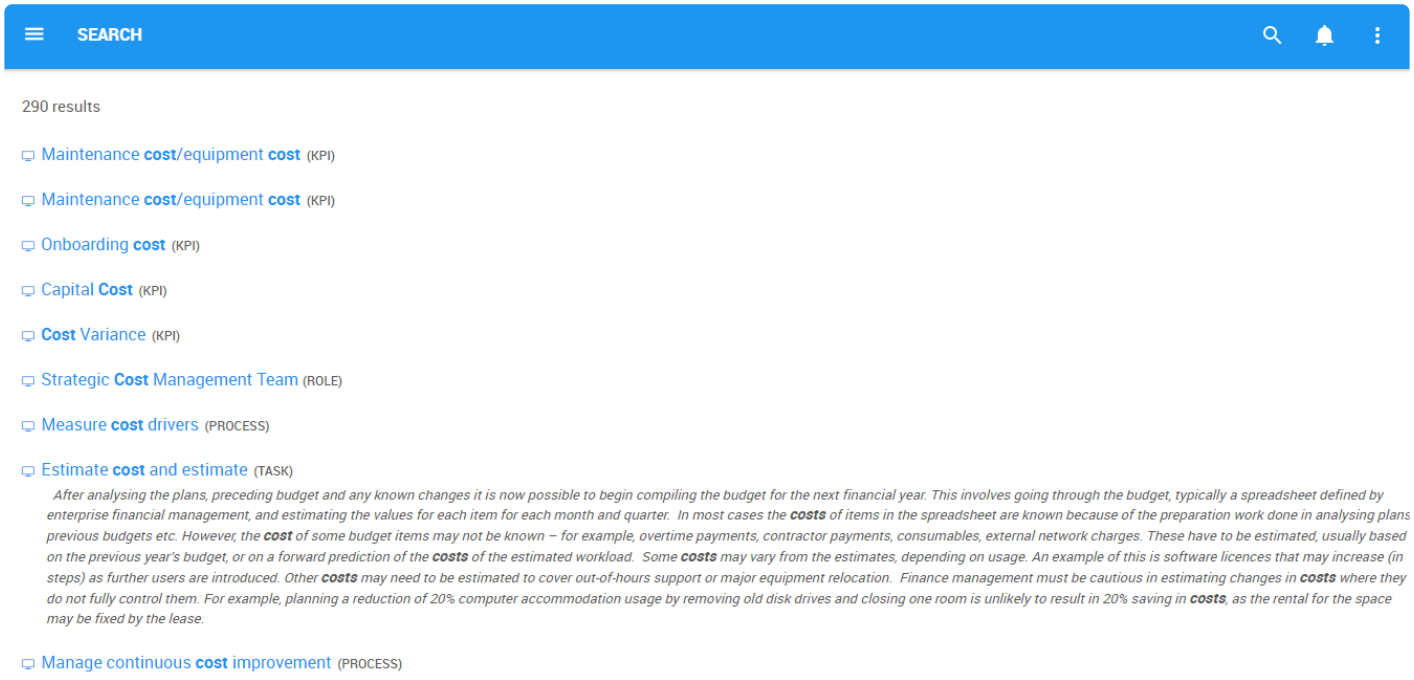
3. Type in the name you wish to search in the search bar.

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



Item	Setting	Purpose
A	Number of Search	This provides users with the total number of matches generated by the search

	Results	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.

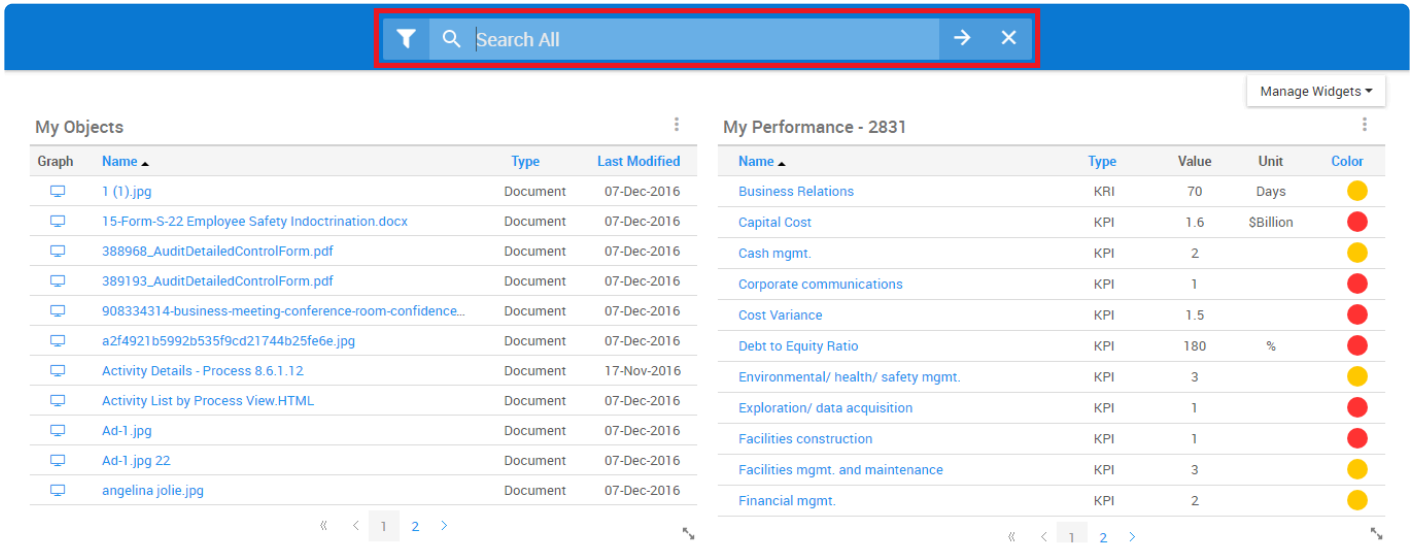
5.1 Advanced Search

Users can use the Advanced Search function to further optimize their searches, accelerating the search process by providing more relevant results.
The Advanced Search allows users to filter by **item type** and **date modified**.

To use the Advanced Search function, please see the steps below:

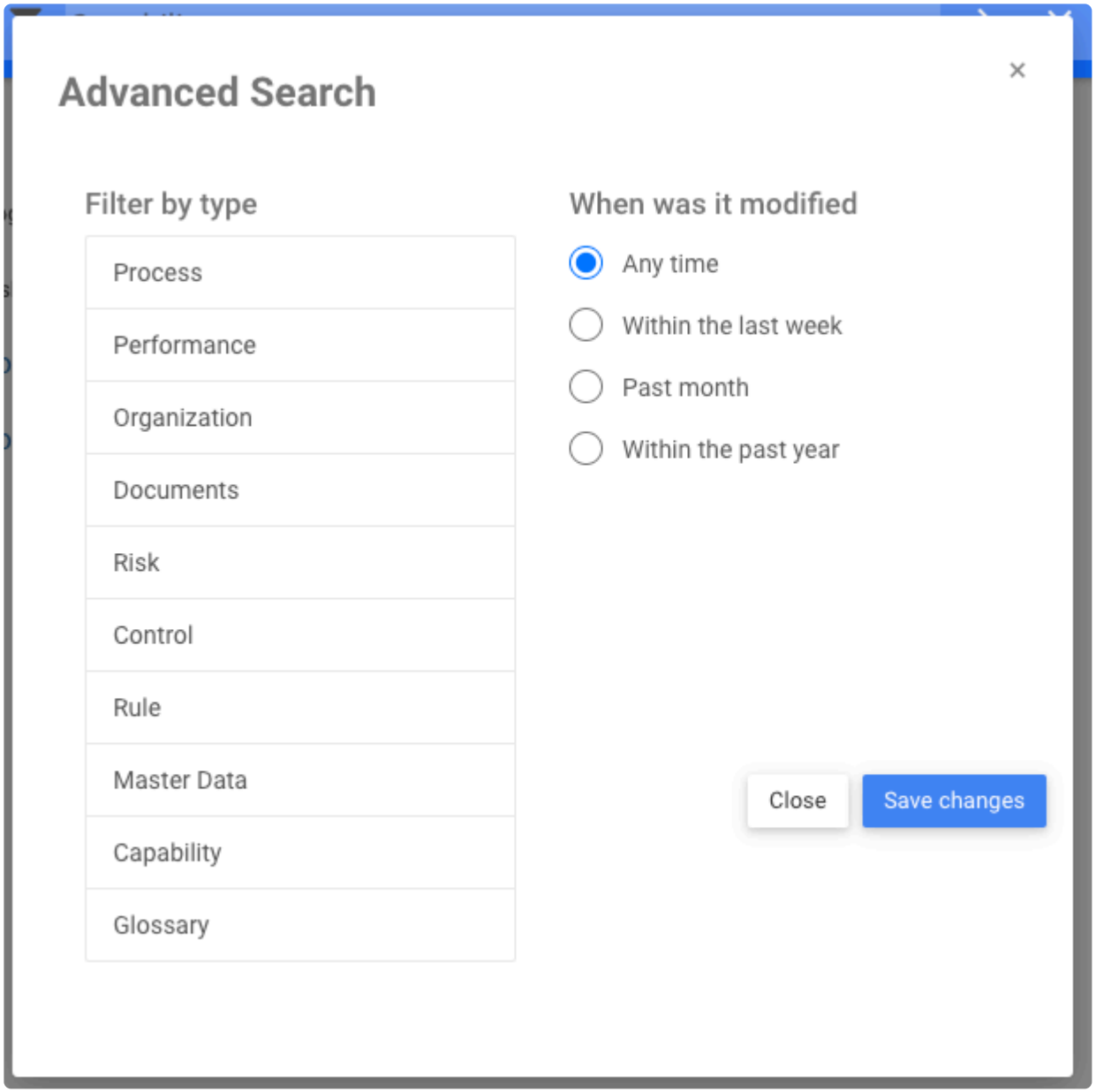
1. Navigate your cursor to the search icon displayed at the top of the page

2. Click on the icon and a search bar will generate

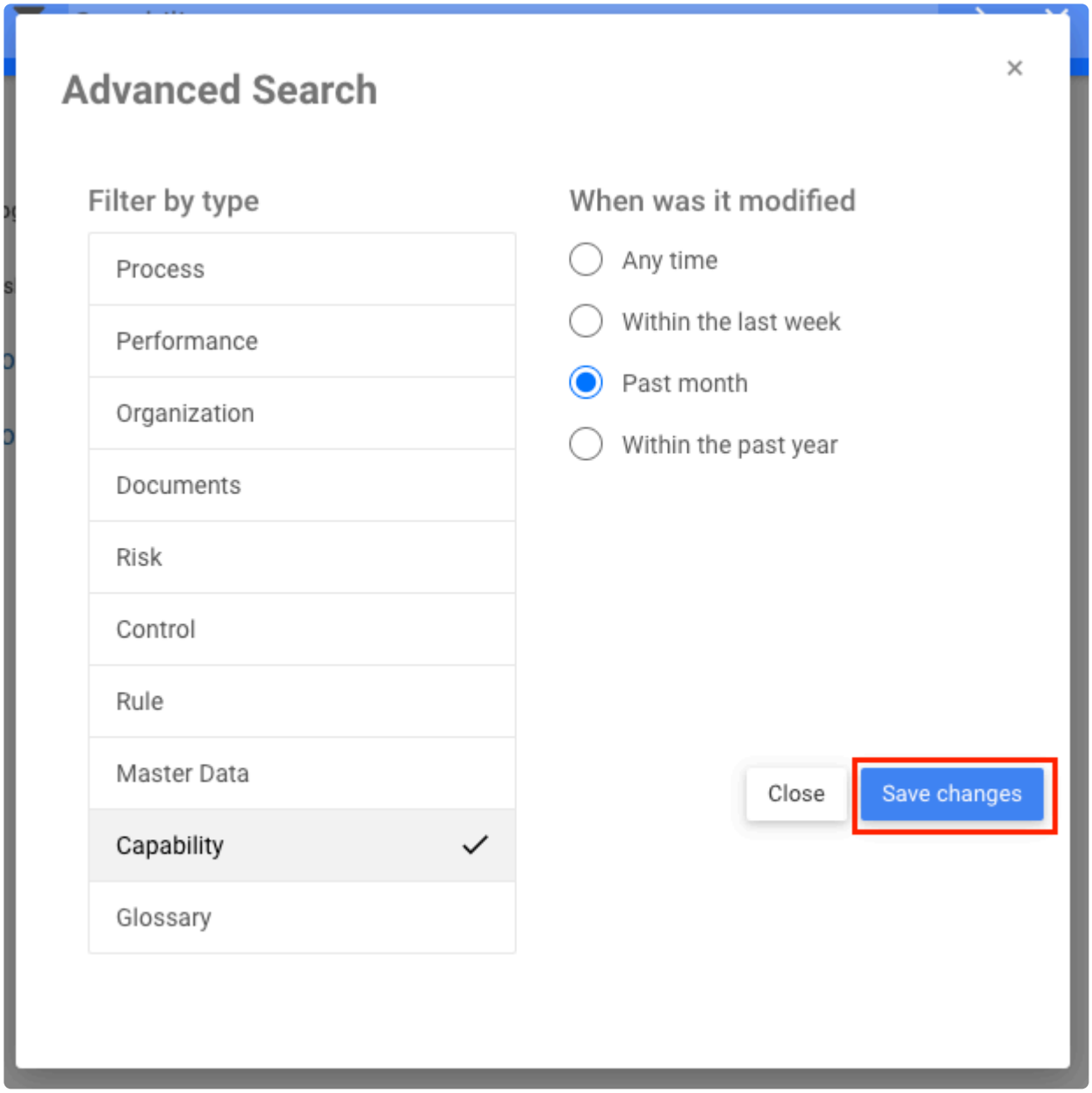


3. Select the “Advanced Search” button by clicking on the icon

4. After clicking the icon, the following pop-up menu will be generated on a user’s screen



5. Select the desired search criteria and click the “Save Changes” button



6. The selected criteria will be saved, and you can proceed to your search.

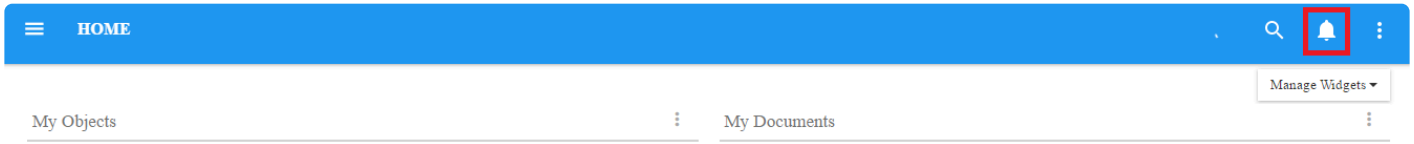
6.0 Notifications

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

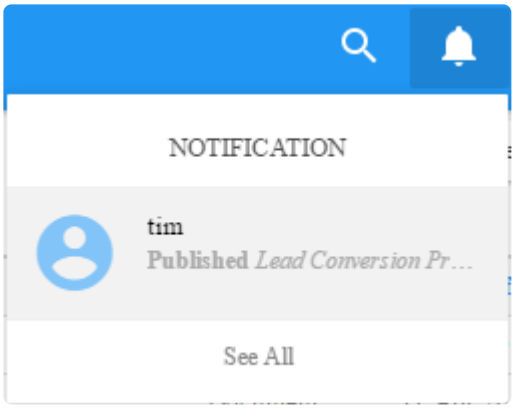
Object Approved by all users	RASCI-VS, Subscribed
Object Approval Cycle Canceled	RASCI-VS, Subscribed
New Discussion	RASCI-VS, Subscribed
Reply to Discussion	RASCI-VS, Subscribed
Discussion Closed	RASCI-VS, Subscribed
New Incident	RASCI-VS, Subscribed
Reply to Incident	RASCI-VS, Subscribed
Incident Closed	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:

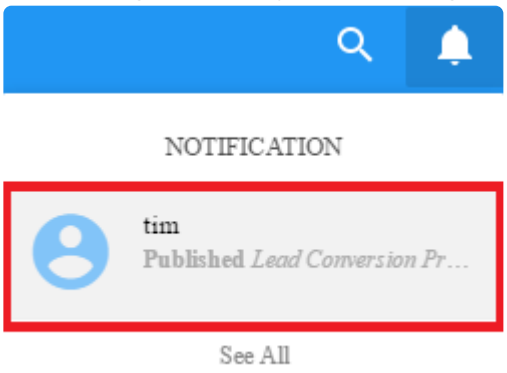
1. Login to the EPC

2. Navigate to the notification icon

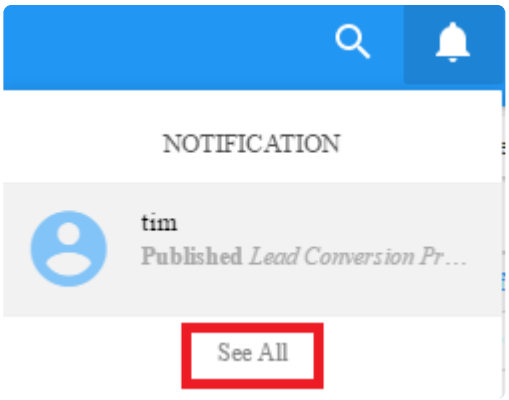
3. Click on the icon and it will generate a drop-down window



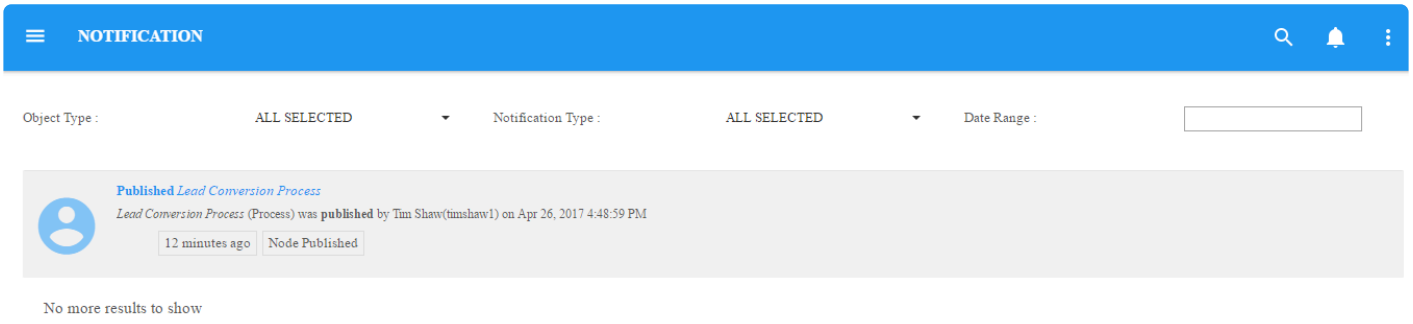
4. To navigate directly to the item generating the notification, click on the notification itself



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

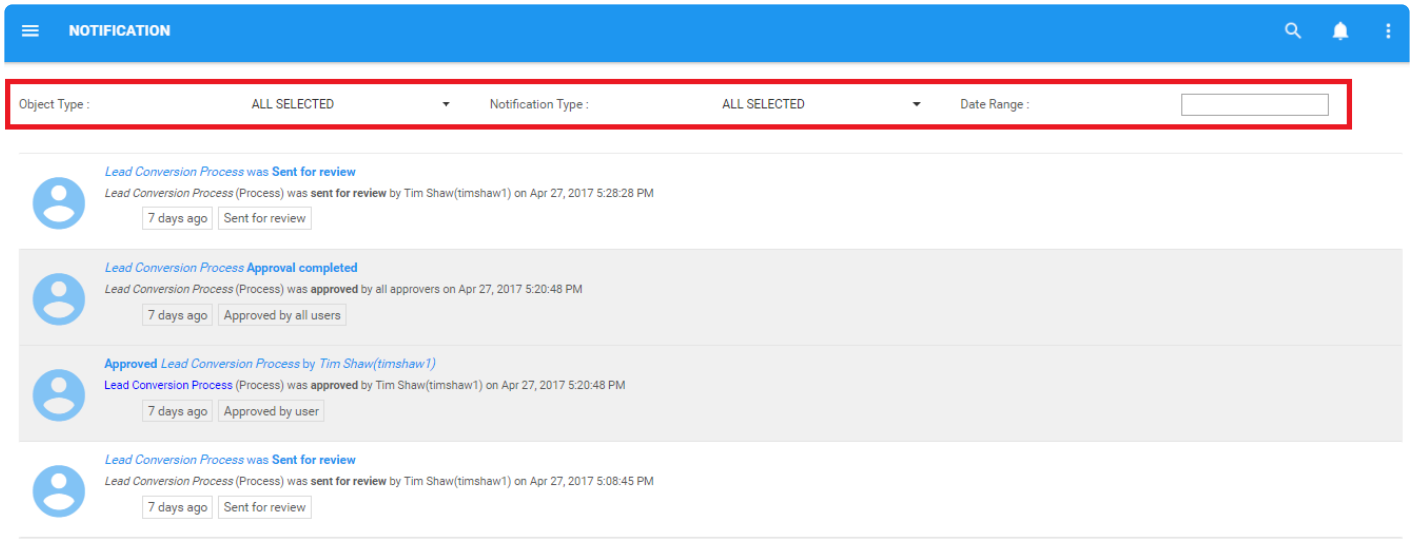


6.1 Notification Organization

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:

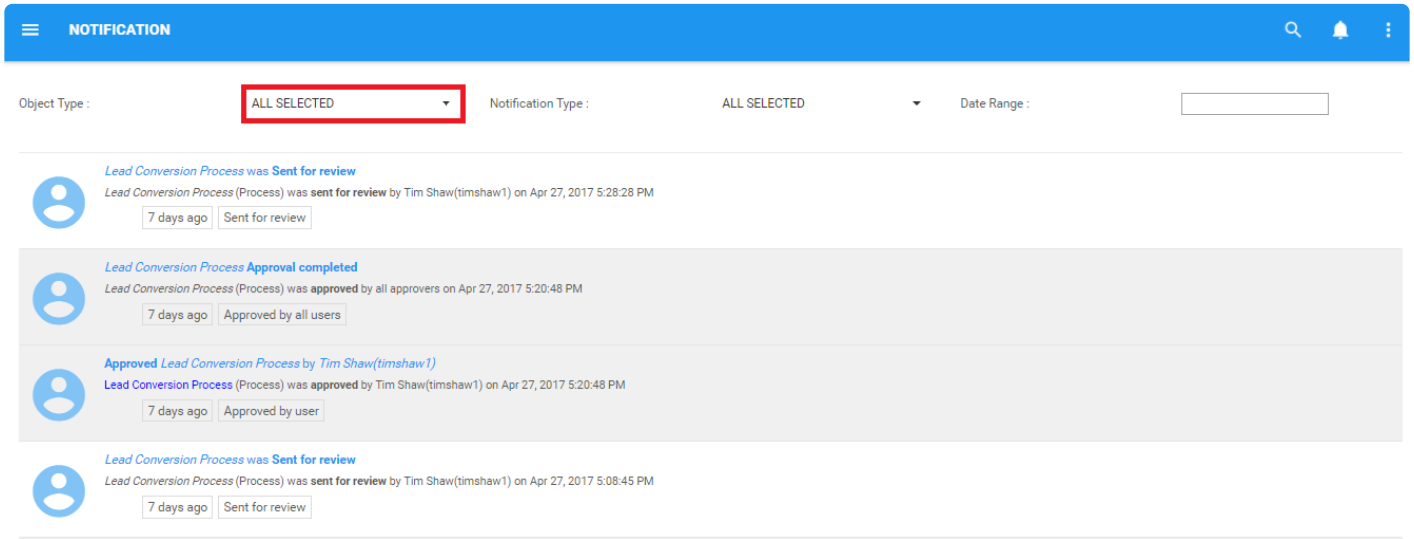
1. Object Type
2. Notification Type
3. Date Range



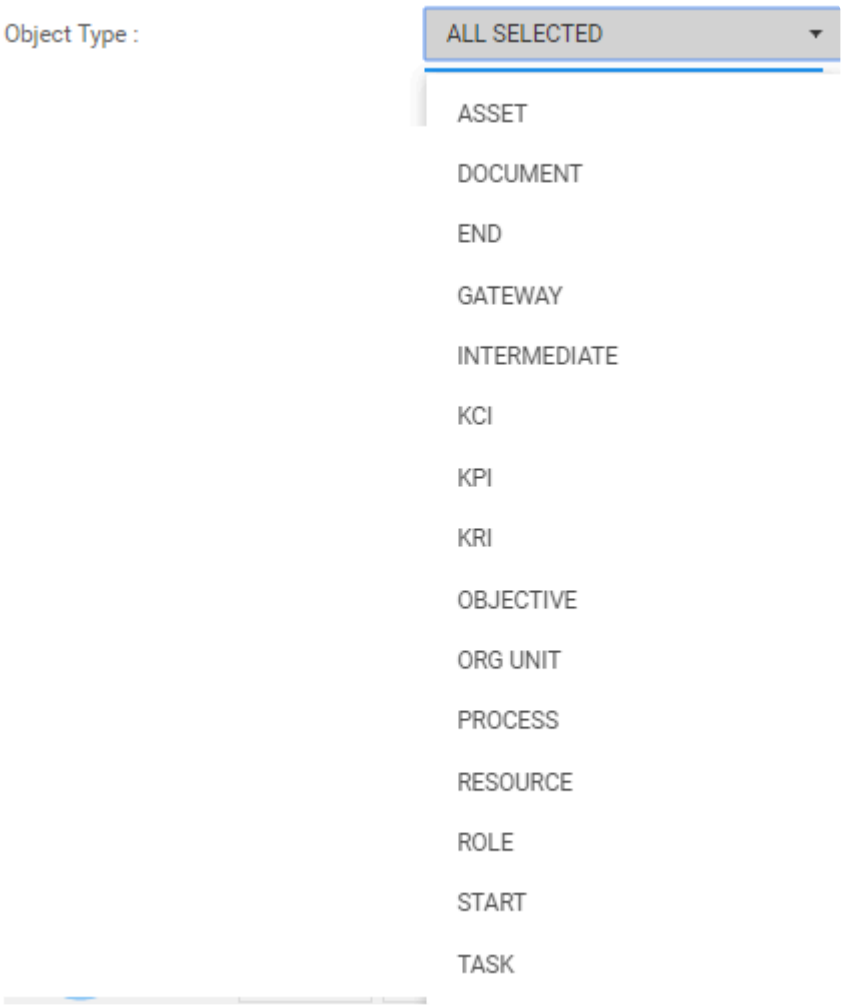
Using Object Type

1. Navigate to the Notifications page

2. Select the “Object Type” Task bar



3. This will generate a drop-down menu

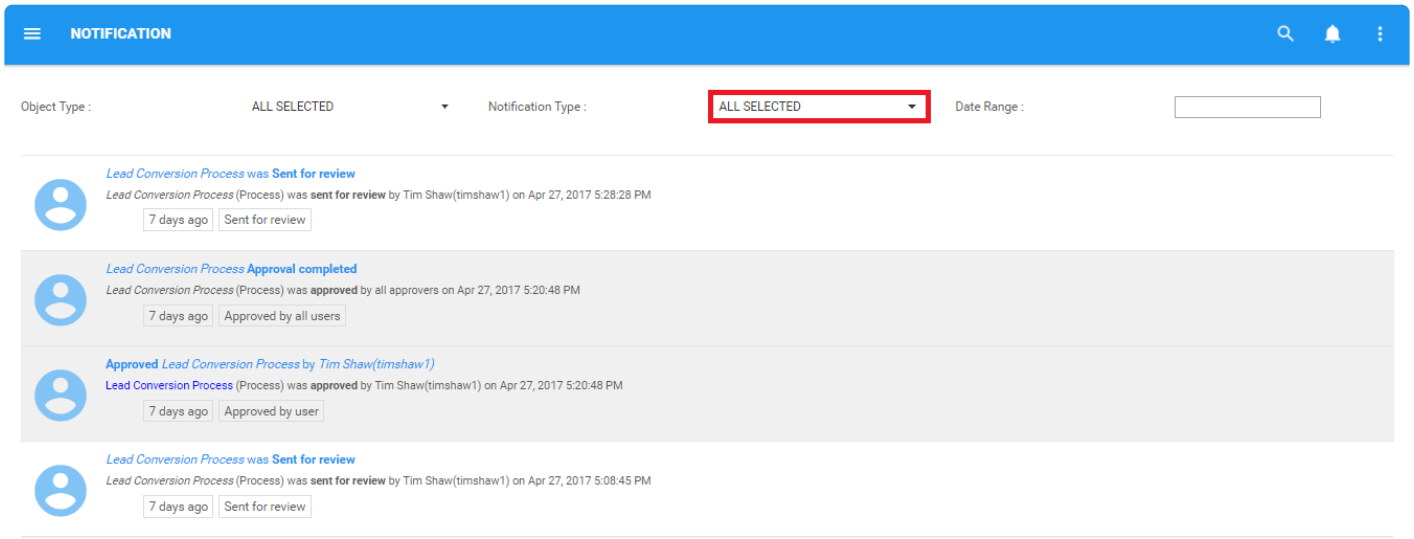


4. Select the desired Objects. Users can select 1 of multiple different object types simultaneously

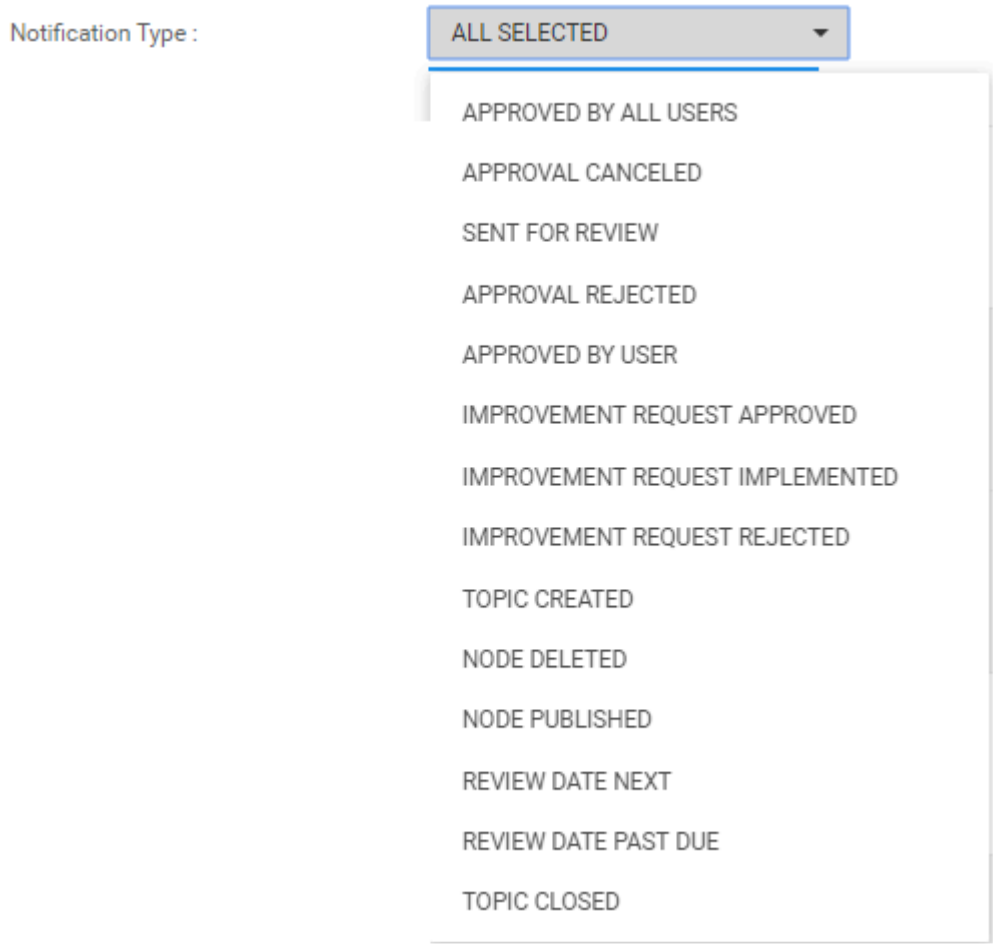
Using Notification Type

1. Navigate to the Notifications page

2. Select the “Notification Type” Task bar



3. This will generate a drop-down menu

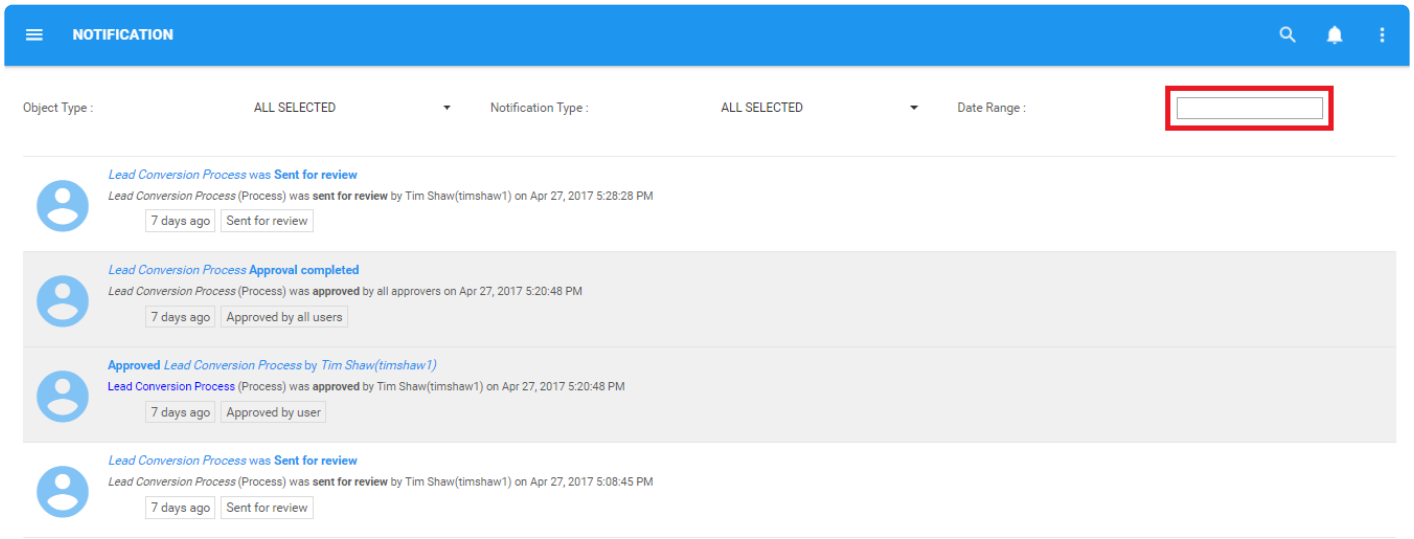


4. Select the desired Notification Type. Users can select 1 of multiple different object types simultaneously

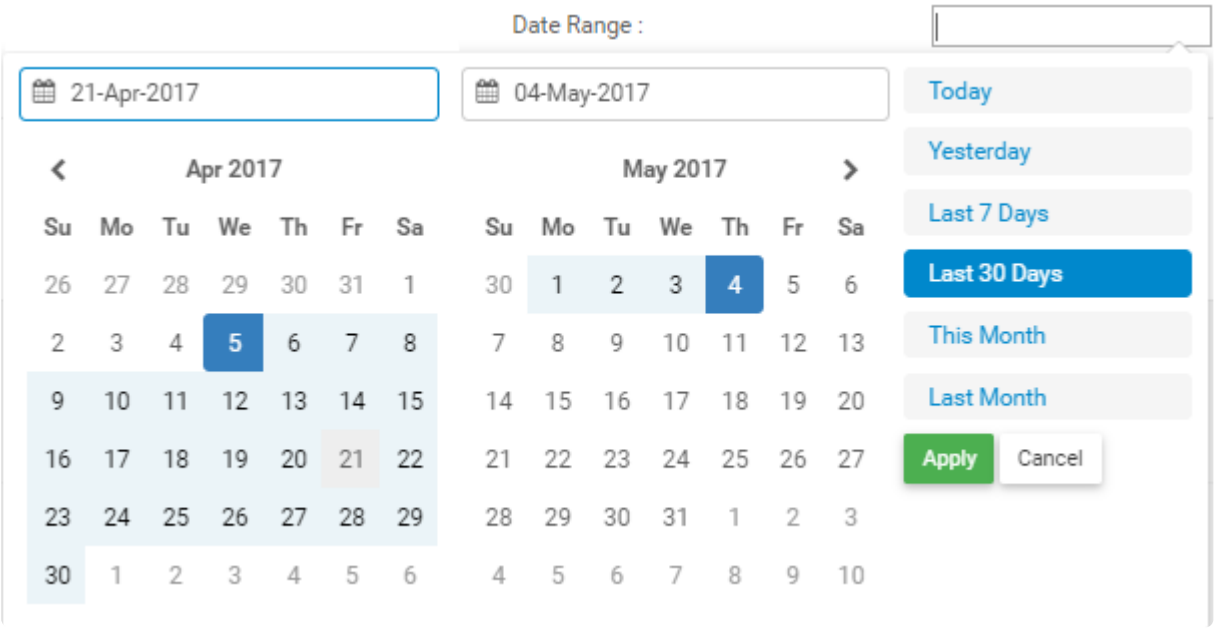
Using Date Range

1. Navigate to the Notifications page

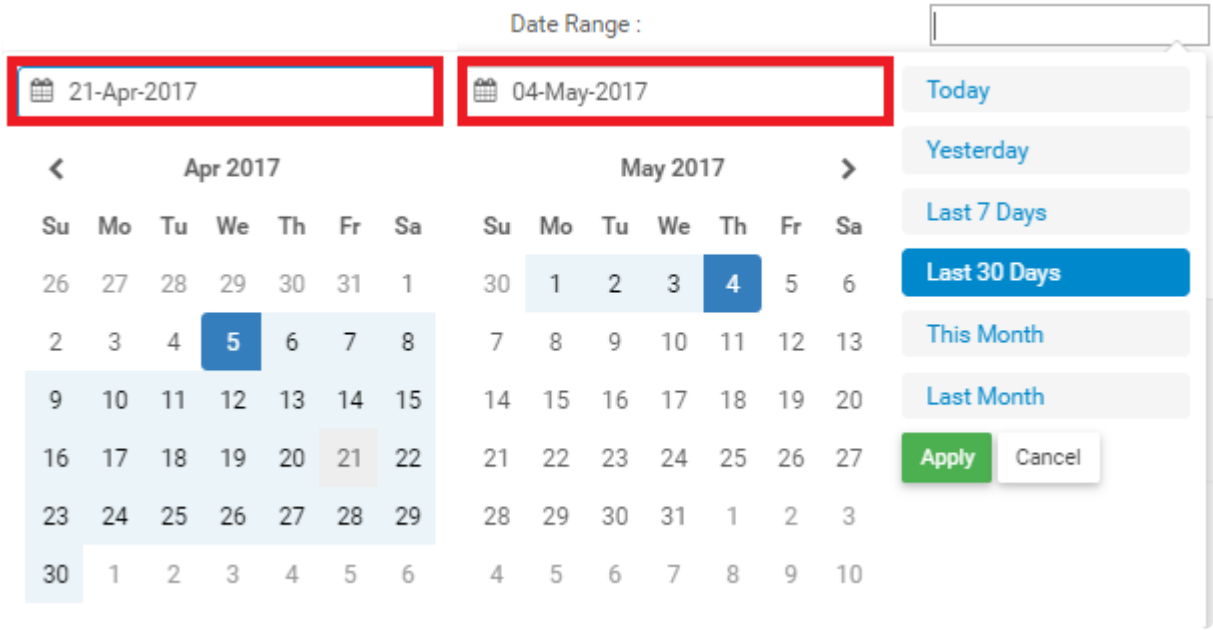
2. Select the “Date Range” Task bar



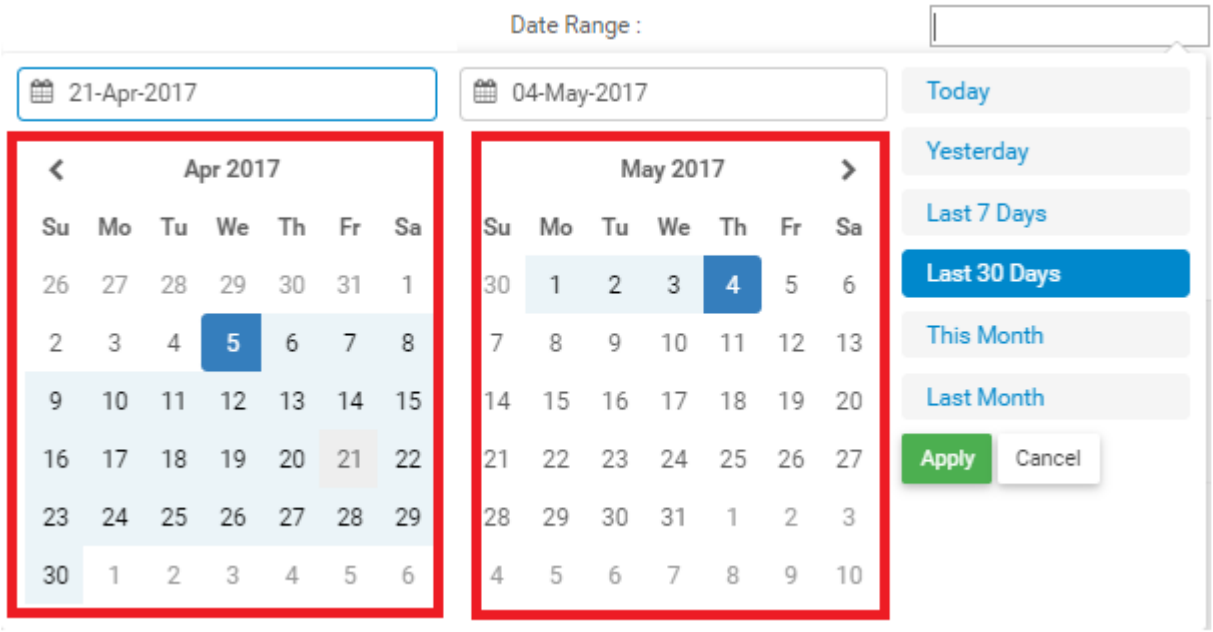
3. This will generate a drop-down menu



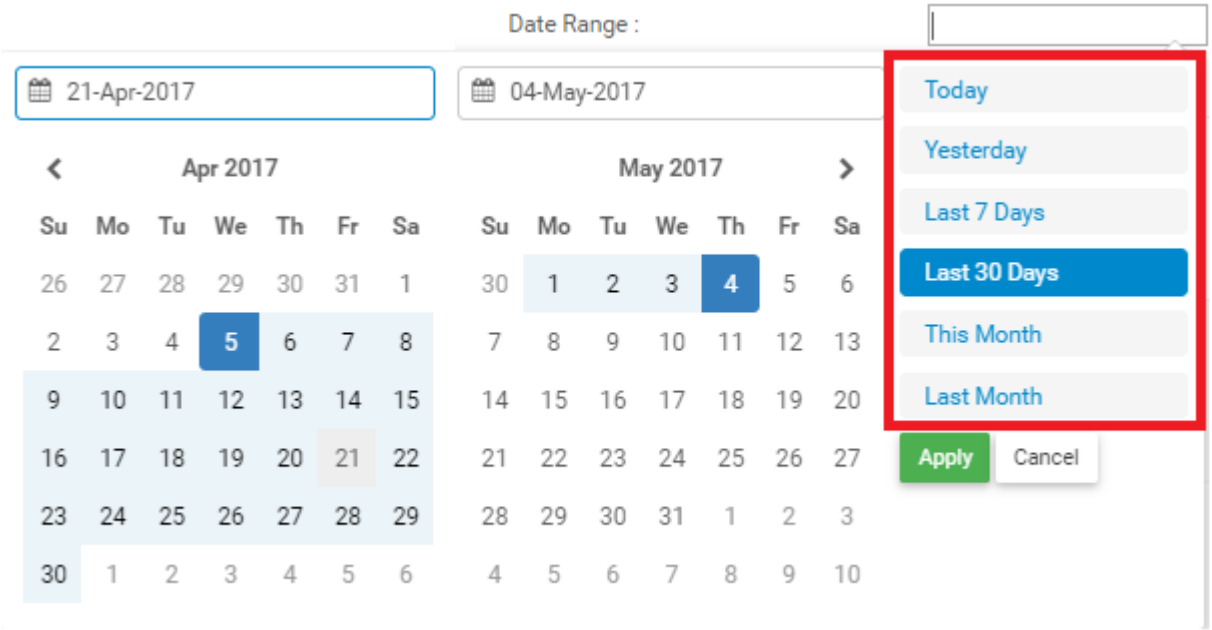
Users can manually type in the date ranges they desire:



Users can select the date range within the displayed calendar by selecting both the month and date within each calendar:



Users can also select the default date ranges:



4. Once the desired date range is selected. Click the Apply icon and the date range will be applied.

6.2 Enable/Disable Browser Notifications

Users can enable and disable browser-based notifications on their EPC Web App.

These notifications are generated by each browser, and require a different enabling/disabling process per browser. Please see the sections below for browser-specific instructions.

1. Chrome
2. Firefox

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.

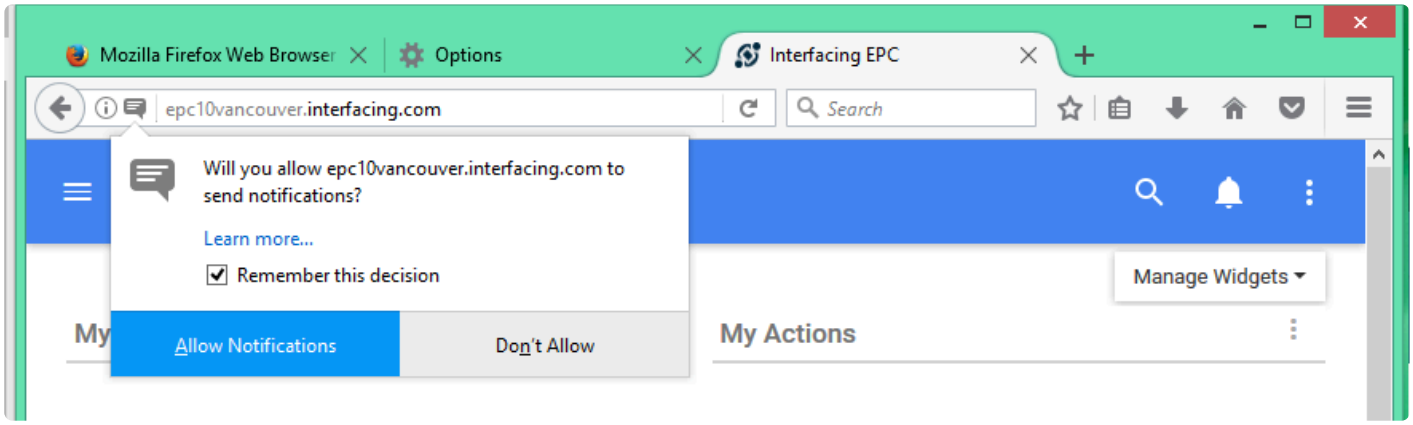
6.2.2 Firefox Notifications

Enabling Notifiations

To enable browser notifications for Mozilla Firefox, please see the steps below:

First Time Users

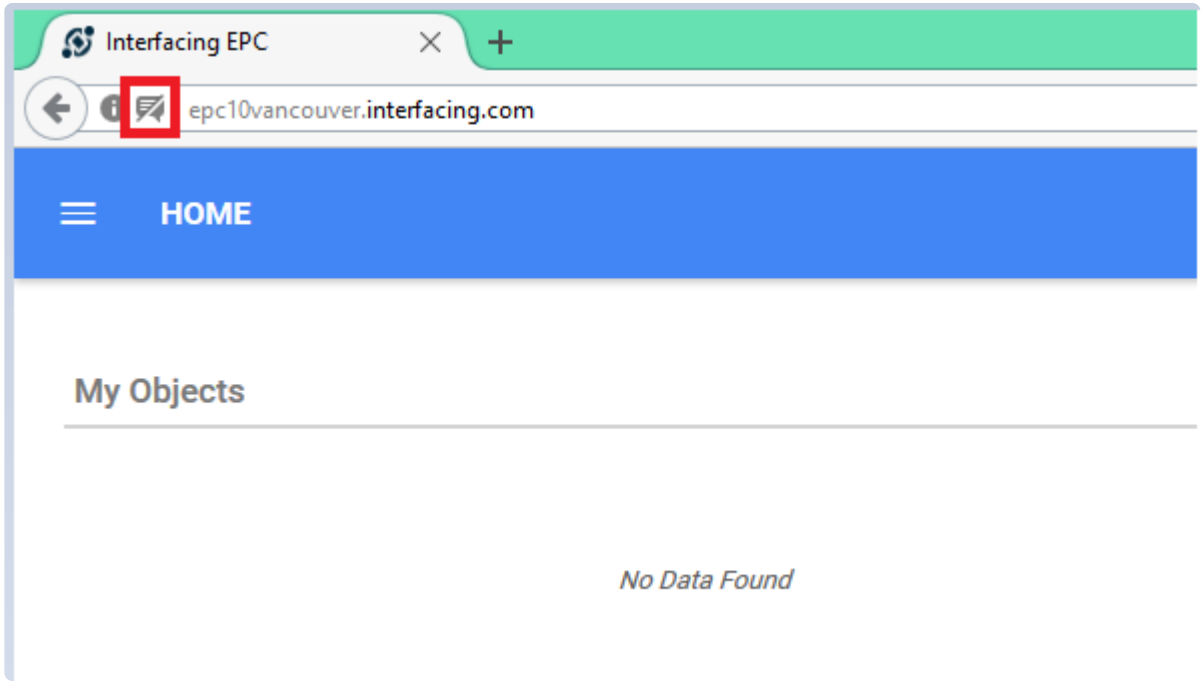
1. When logging into your EPC Web App for the first time, you will receive the following



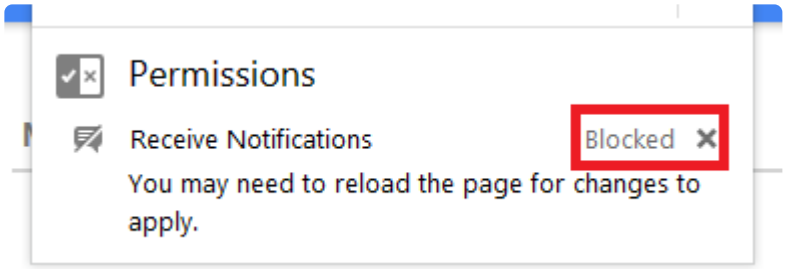
2. Select “Allow Notifications”

Repeat Users

1. Select the “Notifications” icon on next to the URL



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.

6.3 Reminders

When a user has pending actions, then this user will receive a notification by e-mail with a list of all the pending actions from a day after the task was created and then every day after until the tasks are completed.

A reminder can be for all those actions type:

- Approval
- Confirmation
- Endorsement
- IR to implement
- IR to publish
- IR to review
- New Revision update to Review
- Out of sync

The reminders will contain the following information:

Reminder Oct 9, 2019 8:00:04 AM

Hello vanessa (vbm), A
This is a reminder that you have pending actions for the following object(s) in the EPC WebApp.

IR to Review: Oct 8, 2019 11:44:04 AM B
Risk: Goods damaged during shipping [V 2.0000] C
Sent by: vanessa-admin (vbmadmin) D
Environment: Demo E
Due date: Oct 8, 2019 F

IR to Review: Oct 8, 2019 11:49:06 AM
Risk: Hiring unsafe candidates [V 2.0000]
Sent by: vanessa-admin (vbmadmin)
Environment: Demo
Due date: Oct 8, 2019

Endorsement: Oct 8, 2019 7:19:46 PM
Process: Hello vbm 33333 [V 1.0101]
Sent by: vanessa-admin (vbmadmin)
Environment: Demo
Due date: Oct 15, 2019
Comment: sent by vbmadmin time is 15h16 due date is 2019-10-15 G

Approval: Oct 7, 2019 3:12:07 PM
Process: Performance Rules [V 1.0010]
Sent by: vanessa-admin (vbmadmin)
Environment: Demo
Comment: sent by vbmadmin 11:11 AM

	Item	Description
A	User	The user being notified
B	Actions	The action that generated the notification
C	Module	The module affected
D	Sent by	The user who started the cycle
E	Environment	The environment where the action is located
F	Due date	Not mandatory, the date by which the tasks must be completed.If there is no due date, it will not be displayed
G	Comment	Not mandatory, the sender can add a comment, if there is not comment, it will not be displayed

Rules:

- The reminder is set automatically from a day after the action was sent and then every day after until the user completes their task
- The reminder is currently sorted by the due date and if they’re no due date, then by created date

7.0 Approvals, Confirmations and Endorsements

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.

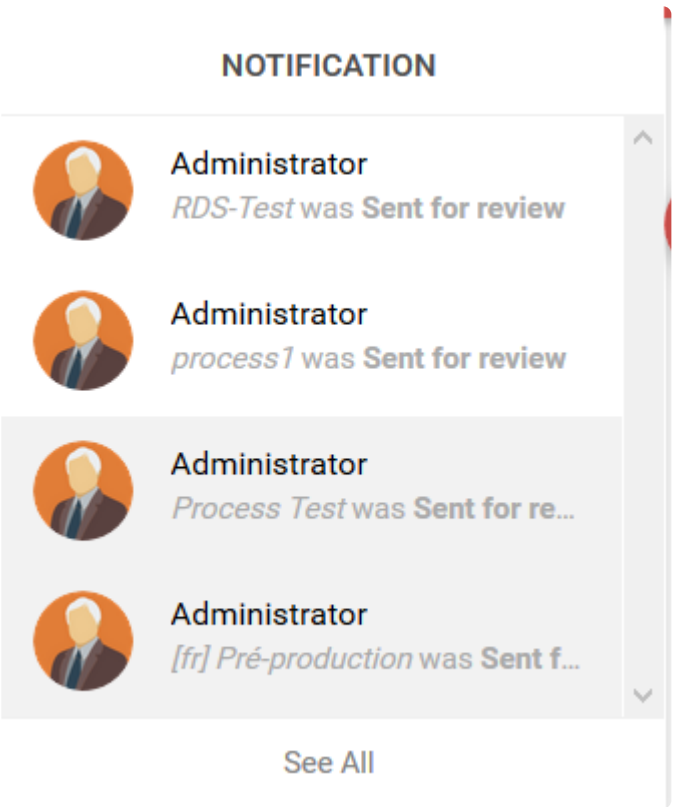
Users can view changes in both Details and Graph pages

Users can access this activity:
1. Through their notifications
2. Through their My Actions Widget

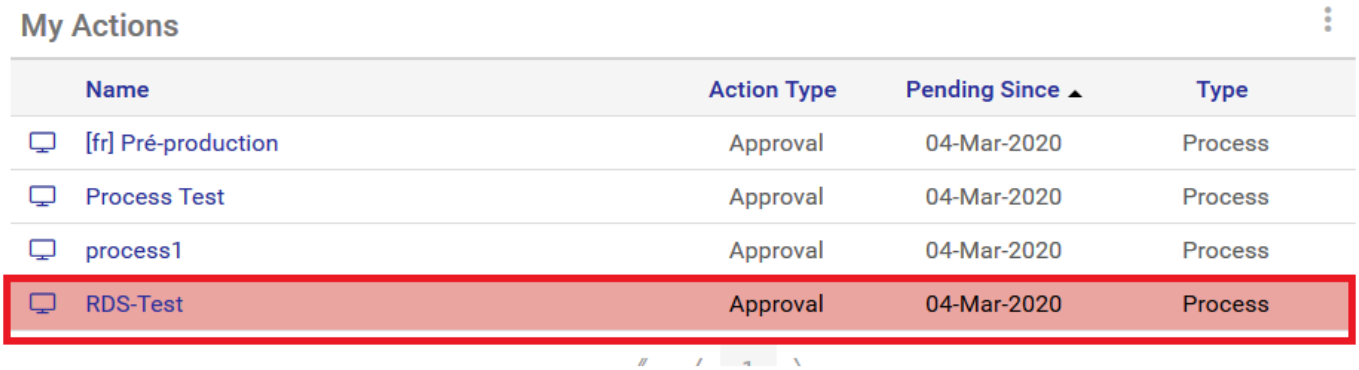
Participating in an Approval Cycle
1. After an EPC Modeler has drafted a change to a process and sent this process in for review, users assigned as approver will receive a notification within the EPC Web App

. Until fully approved, a Process Improvement will be “Pending”

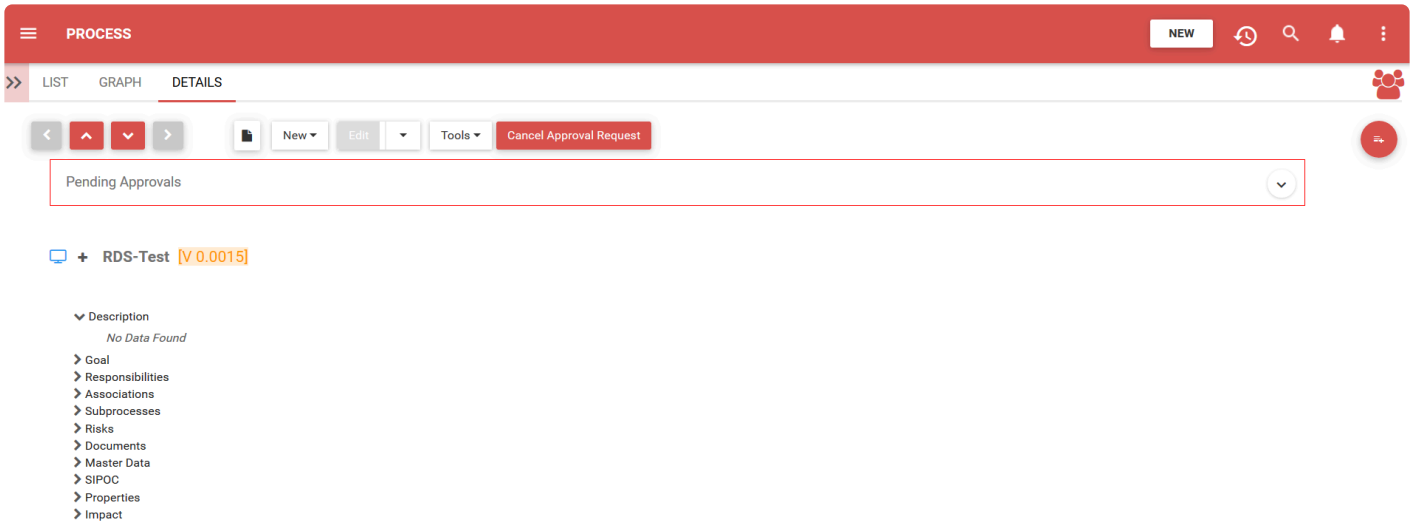
2. Users can navigate to their “My Pending Approvals” of the specific object by selecting the notification



Or through their “My Actions” Widget

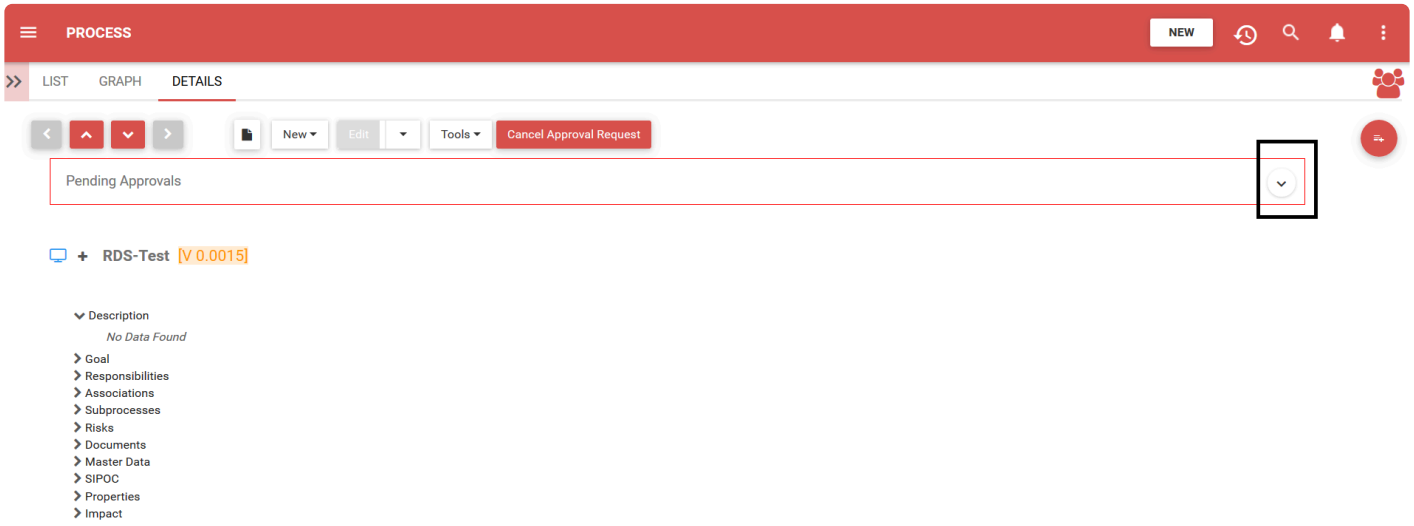


3. Users will be navigated to the item’s details page

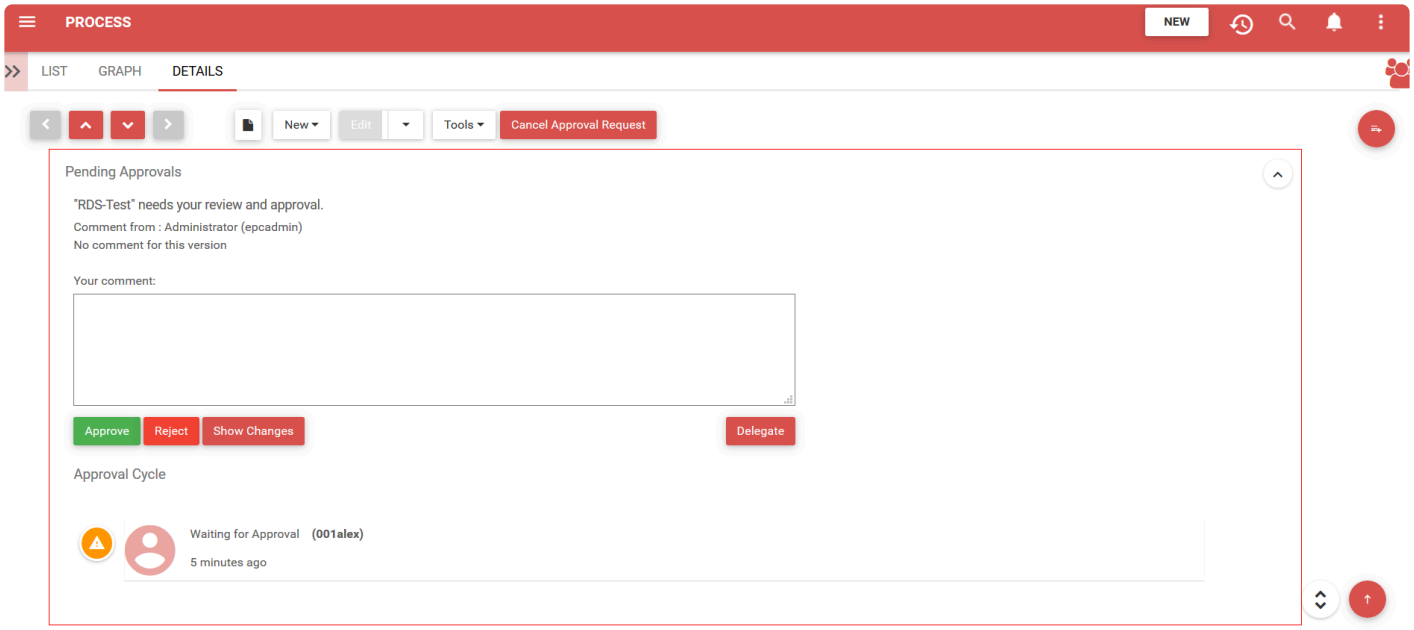


To view “Pending Approvals”, users must be in “Show Latest” view. Please see Section 8.2.2 for further detail.

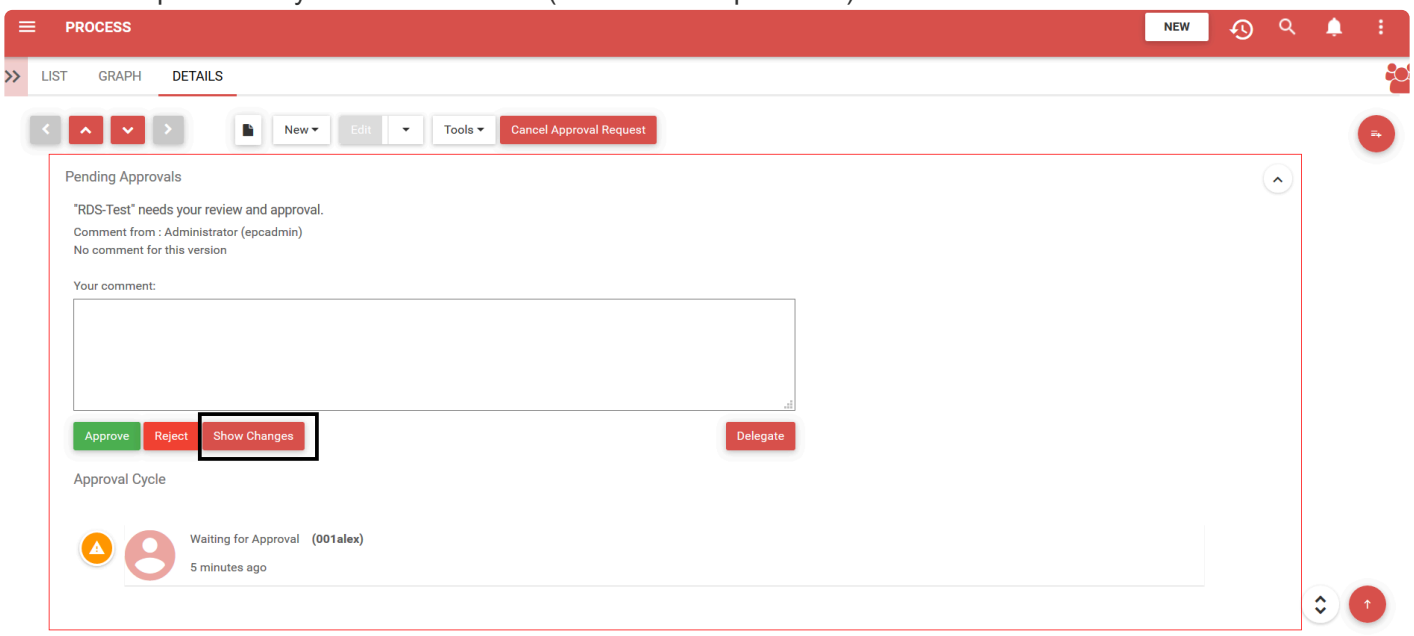
4. To expand the pending approval, select the icon



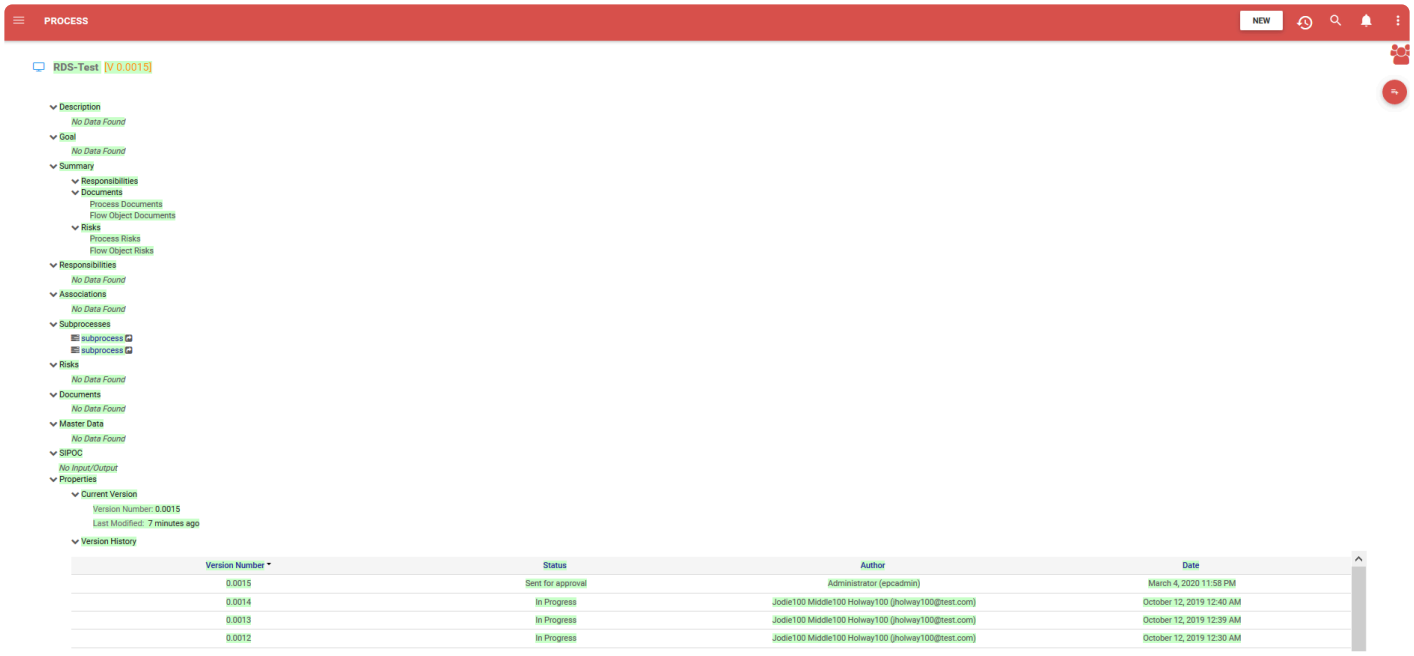
5. This will expand the Approval Request, providing the user with additional information about the proposed change



6. For further details regarding the process change, select the Show Changes button or can select the attachment provided by the EPC Modeler (if attachment provided).



7. After selecting Show Changes, the changes will be displayed on the page. The new changes will be displayed in green and the old versions will be displayed in red. As seen below, the changes to the properties are displayed.



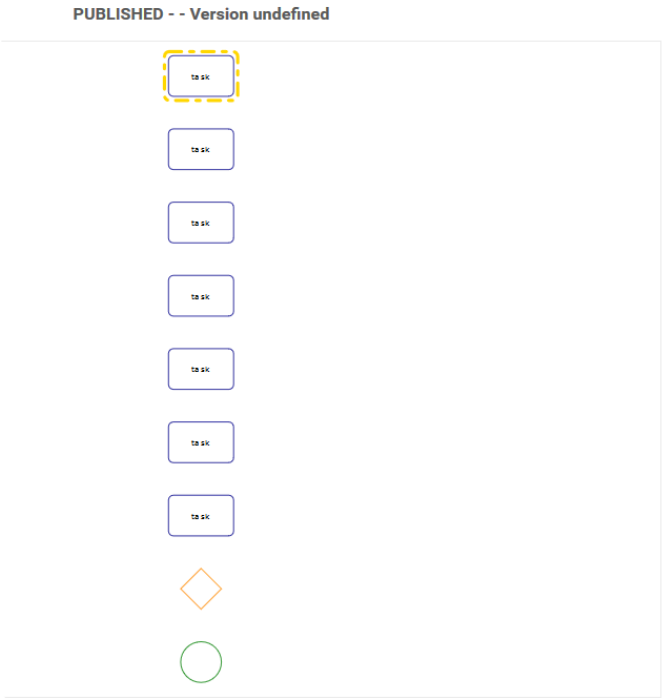
The changes will be displayed on the page you are currently featured. If you are on an item's Details page, the changes will be displayed on the details below. For graphical representation of the changes, please see the steps below.

8. Navigate to the "Graph" tab

9. Expand the "My Pending Approval" of the specific object by selecting the icon

10. Select the Show Changes option

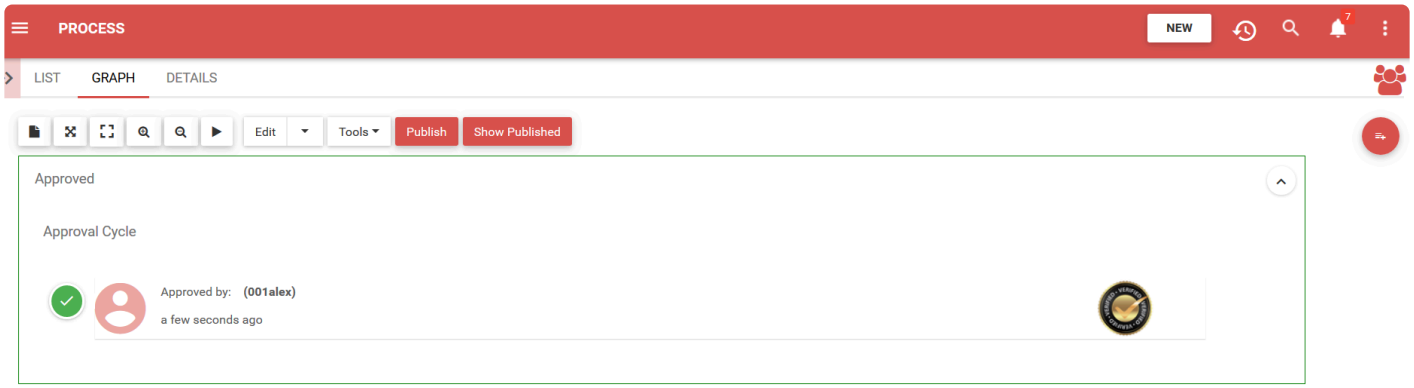
11. On the lower part of your screen, 2 graphs will be generated with the old and newly proposed process improvement.



> 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.

13. Once Approved, the object will not be automatically published, it will have to be done manually.



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:

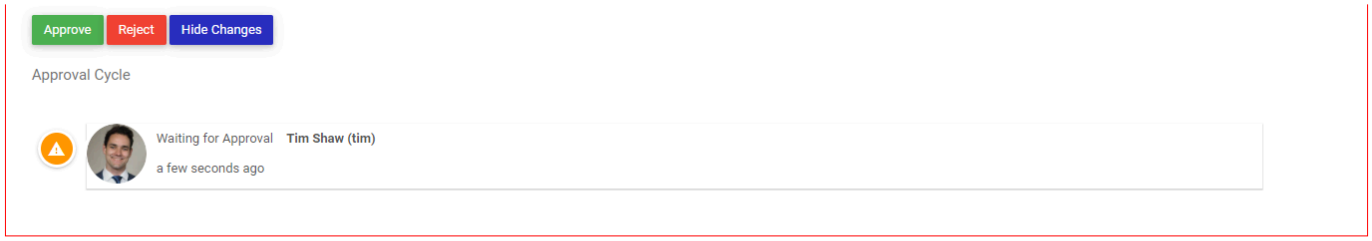
1. Process subject to review
2. Process being reviewed
3. Process review proposed
4. Process improvement approved
5. Process improvement published

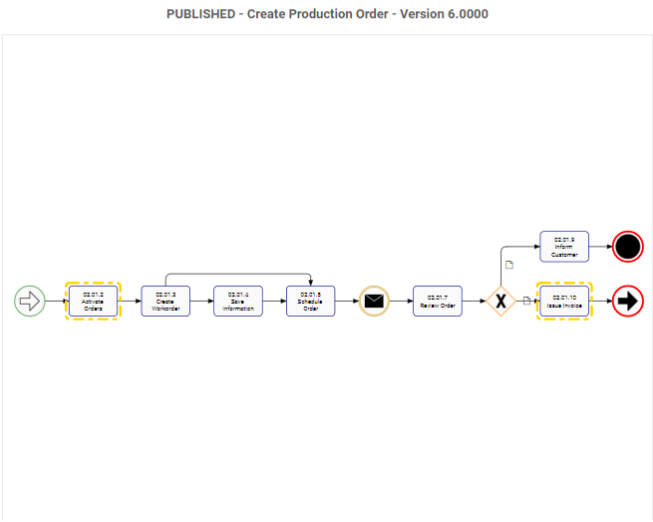
7.1.2 Show Changes

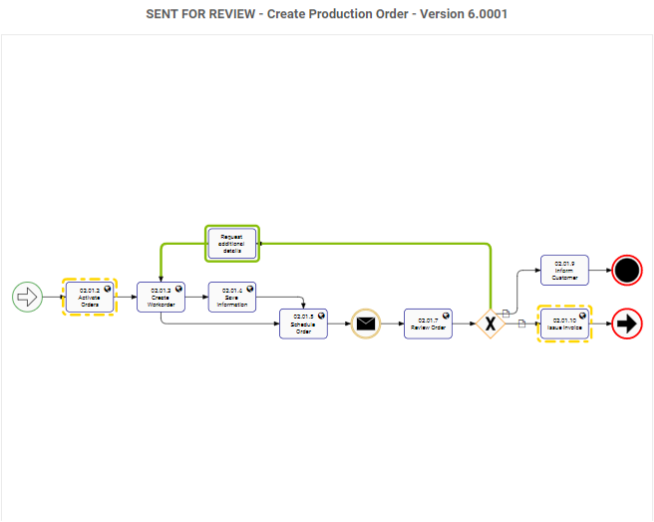
When you are required to approve an object in the EPC, users have the ability to visualize the proposed changes to the object prior to approval. Using the 'Show Changes' feature, your approvers can see the original object and its details, and see the proposed changes highlighted in green, red and yellow to help you see what content is new and improved.

Your approvers can:

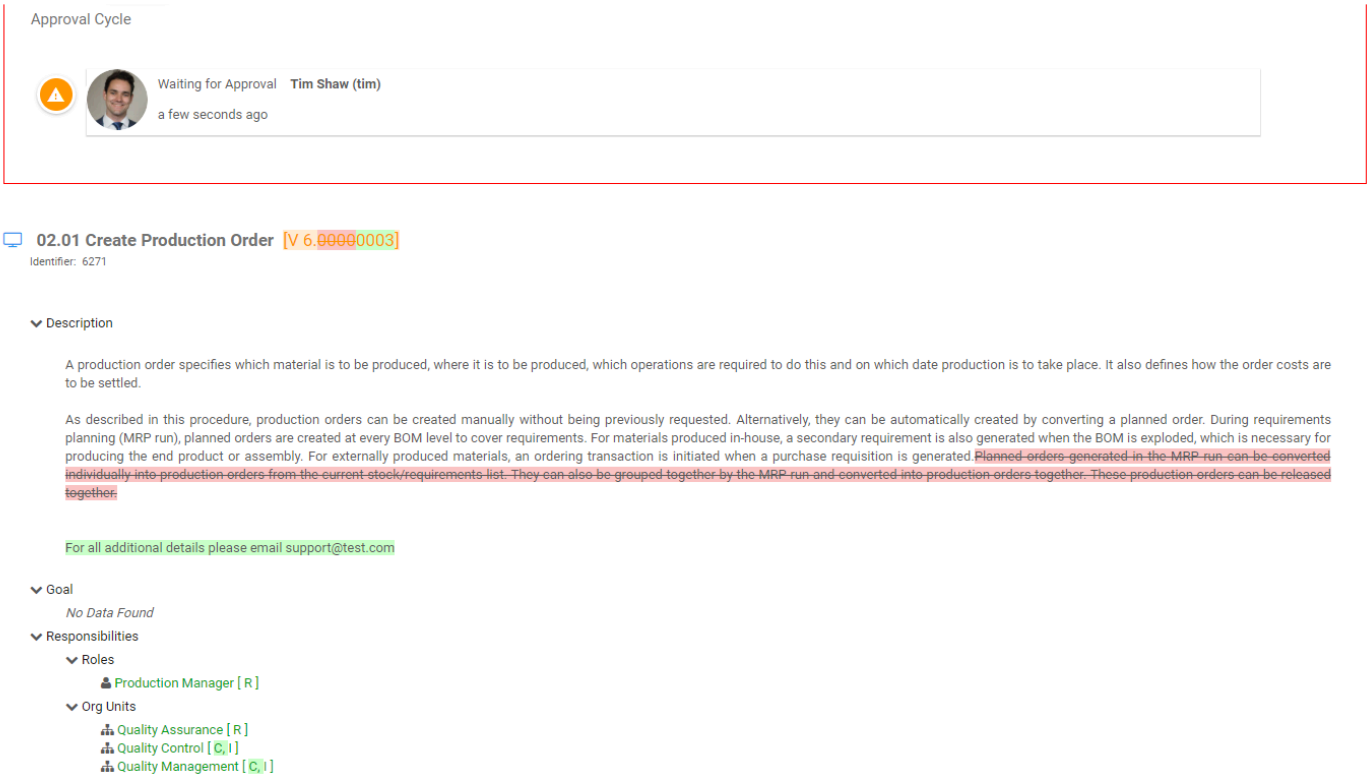
1) Visualize Process Map Changes







2) Visualize Object Details Pages (all objects)



3) View a summary of proposed changes

Simply click on the ‘Show Changes’ button

7.1.2.1 Show Changes Since My Last Approval

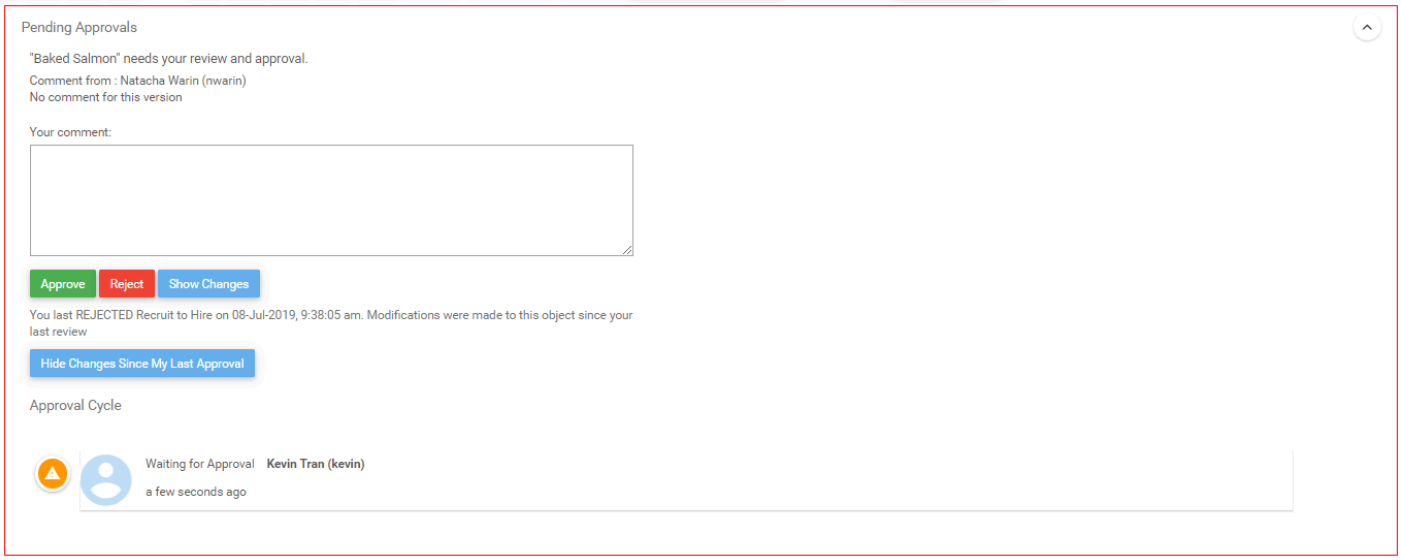
An object may go through several approval cycles before it gets published. For instance, in a serial approval cycle, the second approver might have noticed an error that the first approver did not spot, and will reject the changes. Alternatively, an object may have passed an approval cycle, but underwent modifications before its publication, triggering another approval cycle. In both of these scenarios, the approver might not remember what they have approved if there were several cycles between the approved/rejected change and the publication.

> Note: once the object gets published, the button will not be available until the user approves or rejects an approval cycle at least once.

To compare changes since your last review of the object, follow these steps:

1. Make sure that you have approved or rejected a change on an object at least once.

2. Within the details tab of the document, expand the approval cycle box and click on **Show Changes Since My Last Approval**. Elements that were added will be highlighted in green, and elements that were deleted will be highlighted in red.

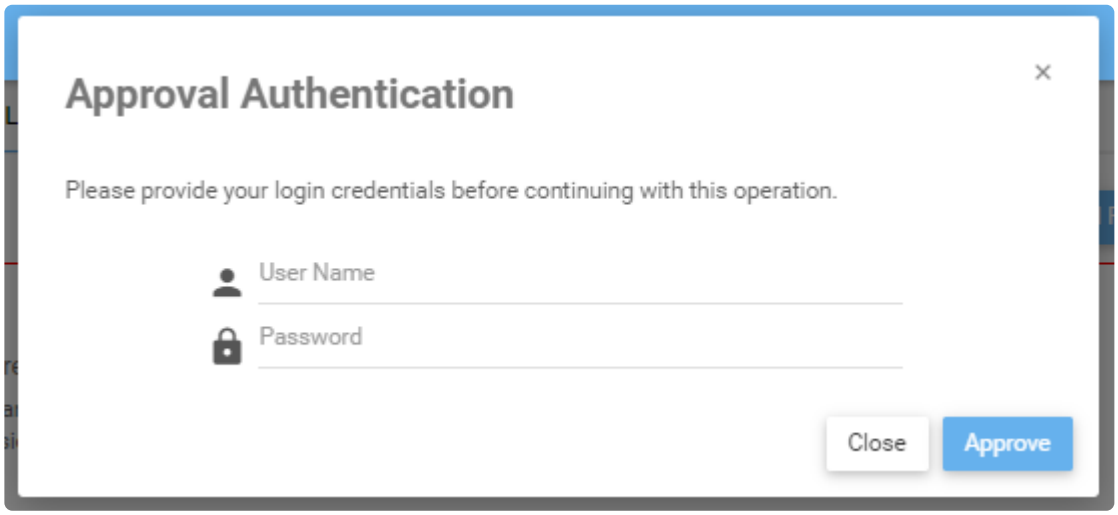


> Users can also compare changes in the process map by following the instructions above while viewing the process map.

7.1.3 Cognito and Multi-Factor Authentication (MFA)

Cognito

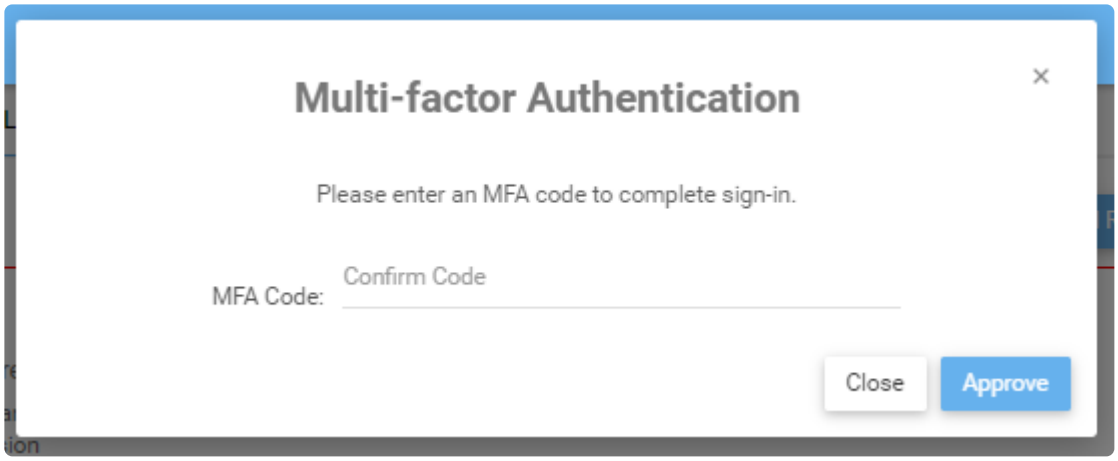
If Cognito is enabled, users will be asked to enter their credentials when approving or rejecting an approval cycle.



Multi-factor Authentication

If MFA is enabled for an user, following the Cognito authentication, the webapp will ask for the MFA code sent over SMS.

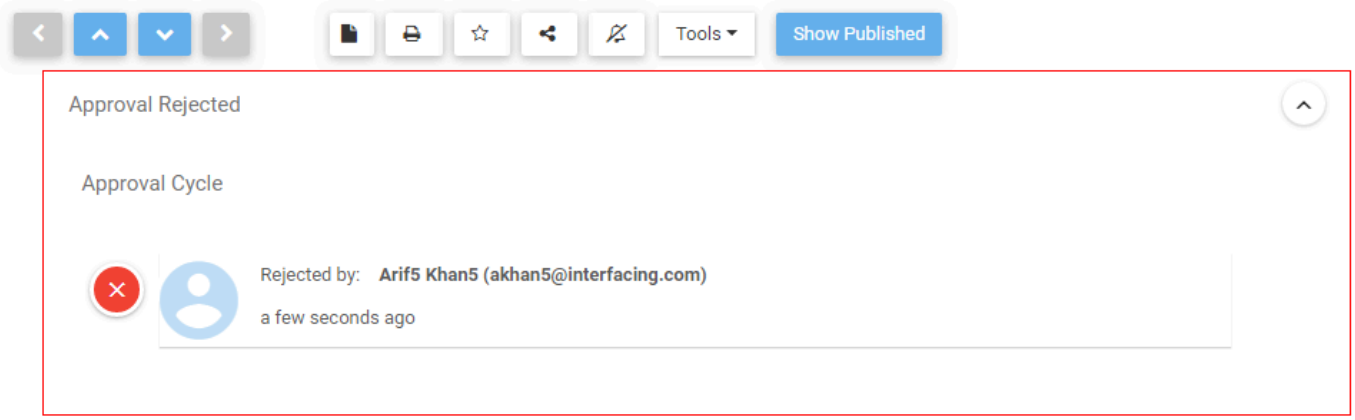
> Every time the MFA code is asked, a different code will be sent. If the window is closed, you will need to use the latest MFA code provided by Cognito.



7.1.4 Approval History

Rejected Cycle

When an approval cycle is interrupted by a user that rejects the changes, an “Approval Rejected” box will be displayed at the top of the Graph and Details page. This box will display the list of approvers, and show who rejected the Approval.

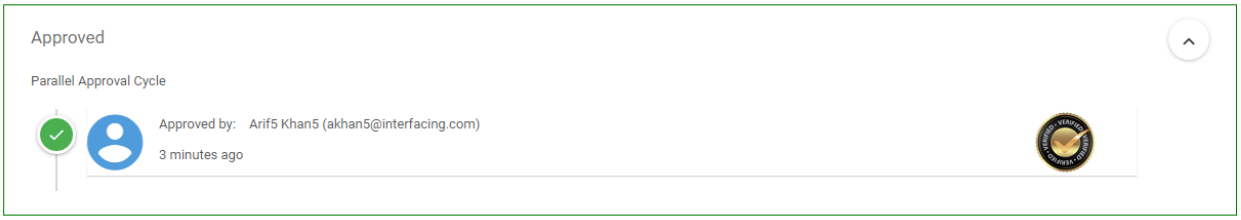


Approved Cycle

When an approval cycle has been Approved the object has been Published, an “Approved” box will be displayed in the Details page, under the Properties section, under the Current version. This box will display the list of approvers, and will show that they all approved the changes.

> If Digital Signature has been enabled, an image will appear next to the approver’s name in the box.

- Description
  - *No Data Found*
- Goal
- Responsibilities
- Associations
- Risks
- Documents
- Master Data
- SIPOC
- Properties
  - Current Version
    - Version Number: 2.0000
    - Last Modified: a few seconds ago

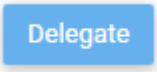


  - Version History
  - Analysis
- Impact

7.1.5 Delegating Approval

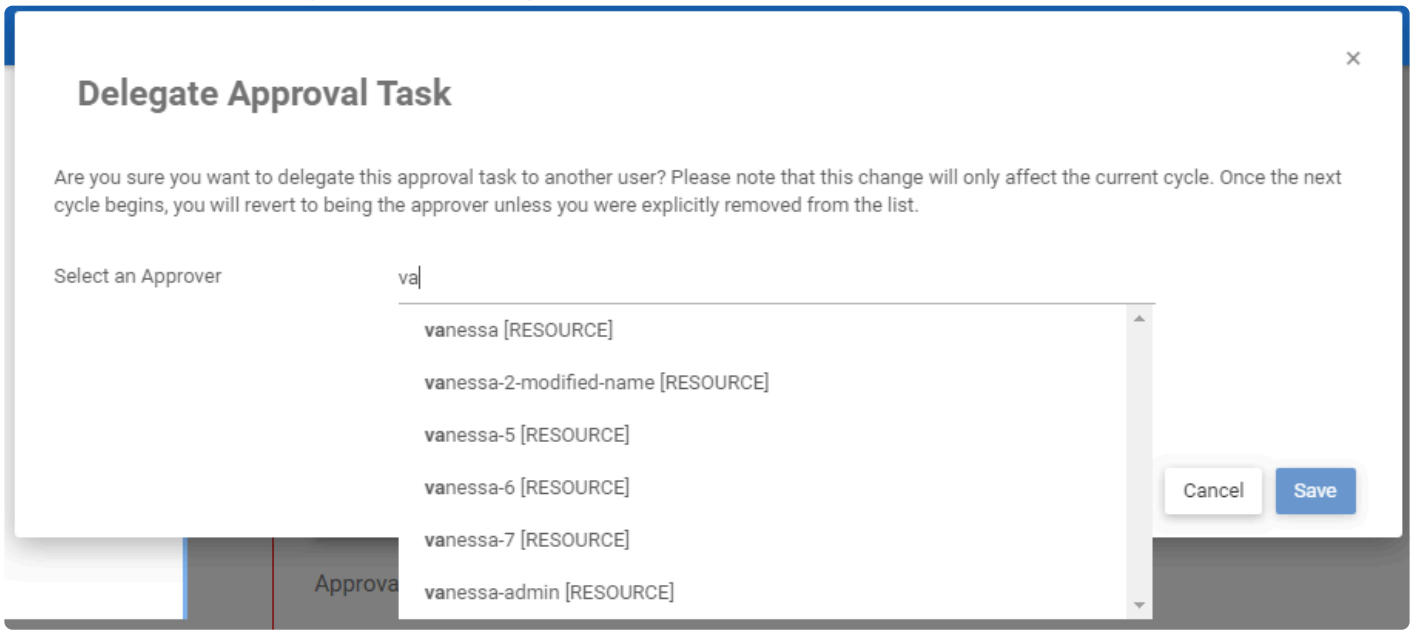
The delegate feature in the approval cycle allows the user to reassign their task for the current cycle. Using the “Delegate” feature, the approver can choose another resource to delegate their task for that cycle. Once a new approval cycle begins, the original approver will revert back to being the approver and the delegated approver will be removed from the list.

> Note: That this change will only affect the current cycle and the original resource will revert back to being the approver for the next cycle.

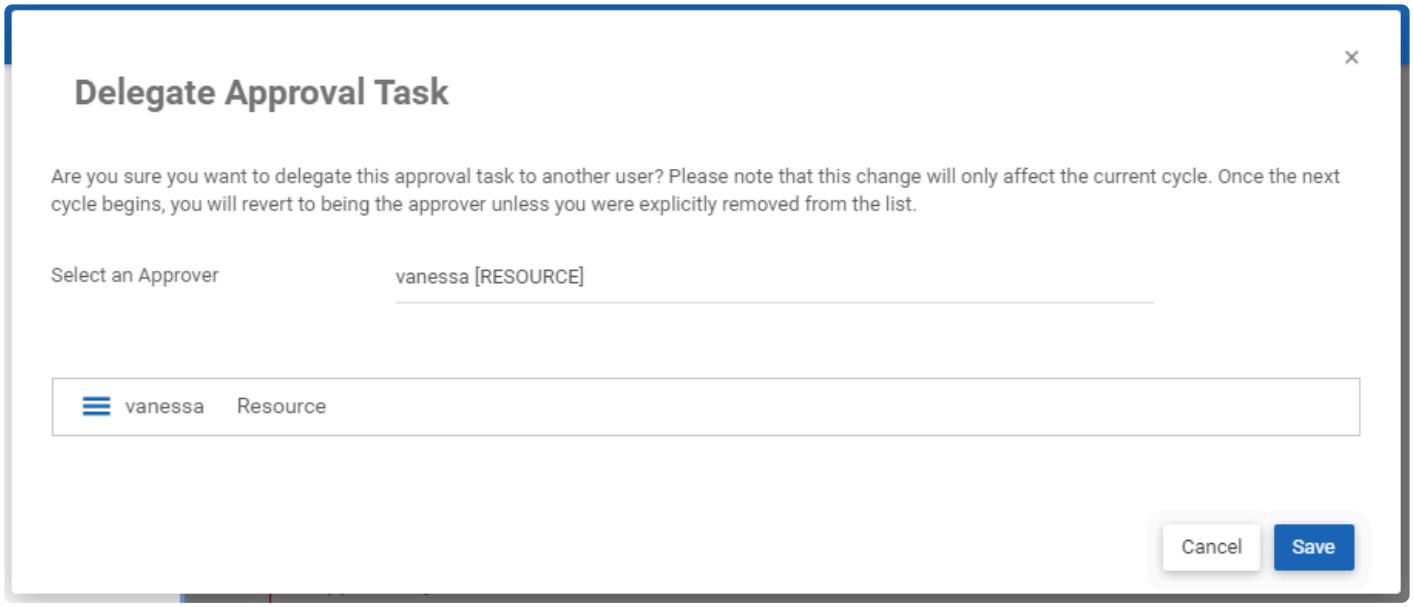
1. Click on the 

button

2. Search the resource you want to delegate to



3. Select the resource you want to delegate to



4. After you click

the delegated resource will become an approver for this object.

Rules:

- An approver cannot select a resource that has been deleted or disabled or if the resource doesn't have a user
- An approver cannot assign a resource that's already in the approval cycle
- An approver when selecting a new resource, the resource is reassigned for that instance only
- An approver cannot assign a resource if the approver already "Rejected/Approved" or the cycle was canceled
- The original approver will revert back to the cycle instead of the delegated approver once the object has been resubmitted
- The delegated approver will receive the same email as the endorsers
- A user will see the latest state of an object when they become a delegated user
- The delegated approver will receive all the new emails and notification related to the approval cycle and not the previous approver
- Pending action from the first approver will disappear once the approver has delegated his task
- When on the delegate approval task window, if the user doesn't select any resource, then the option for saving is disabled
- An approver with displayed content to publish only will only be able to delegate resource that is published
- An approver with displayed content to latest will be able to delegate resource that is published and latest

7.1.6 Signature Compliance

A signature is needed to authenticate approvals on important processes and other changes in documentation of the company, and to bind those individuals signing the object to the approval cycle.

General Workflow

1. An editor checks the “Signature Required” checkbox in Open Assign Objects Approval window.
2. An editor assigns approvers and sends the object for approval.
3. The approvers receive an in-app and email notification.
4. The approvers navigate to the object and see the option to preview the document.
5. The users click on the approved button (assuming they are approving).
6. An authentication window is prompted including the approvers’ signature.
7. Each time a user approves the object, then the signature is added into the document.
8. Once the object is published, an auditor can go to the version history of the object and download/preview the document with all the signatures.

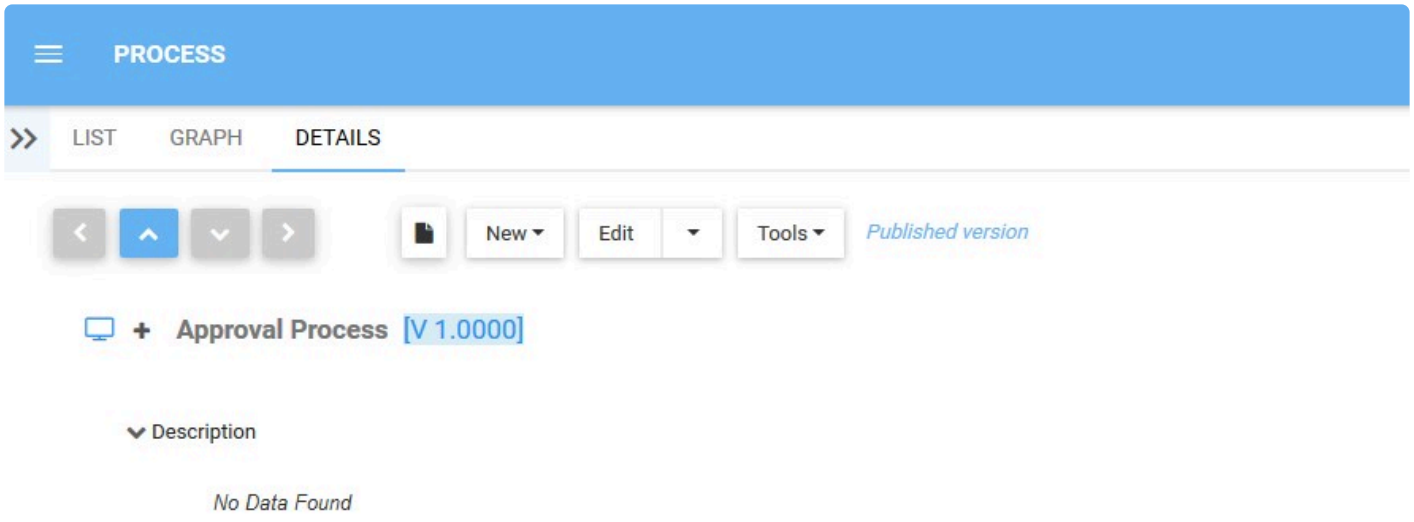
> The option to view the document is available in three places: Pending Approval box, Approval box during approved status, and Approval box in version history after the object was published.

7.1.6.1 Enabling Signature Requirement

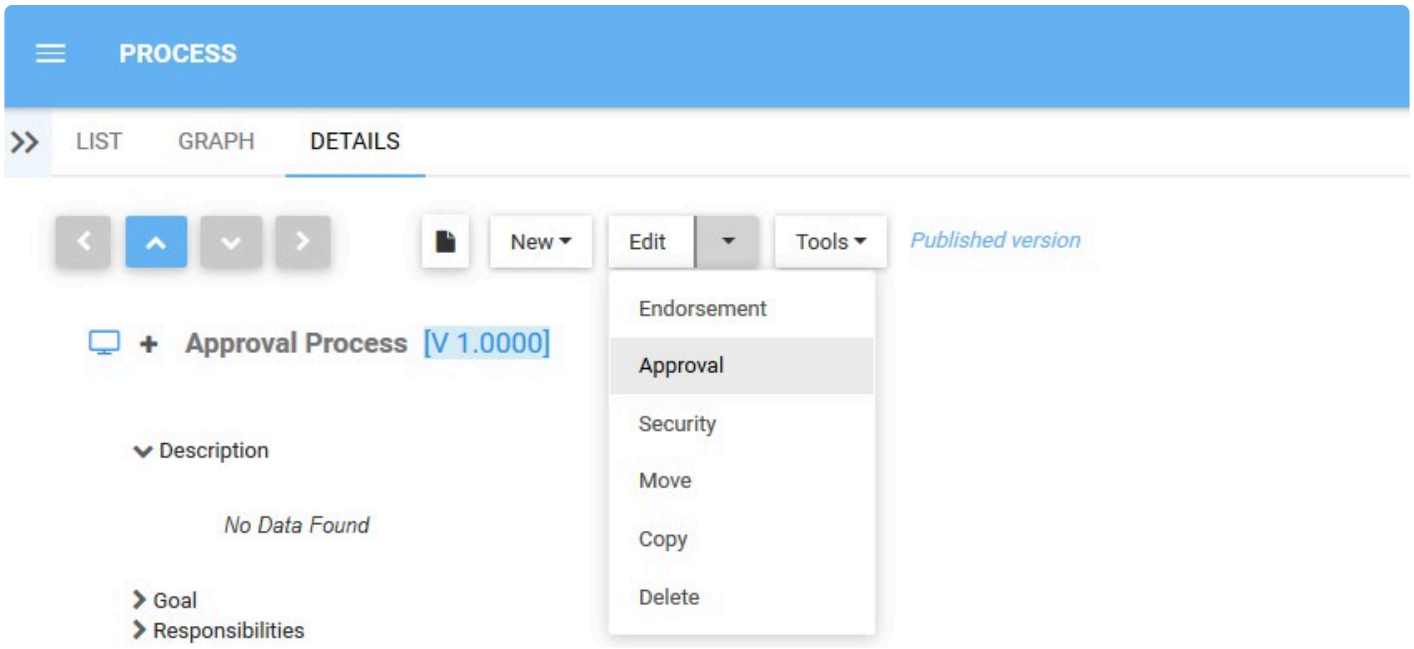
This functionality allows a user to enable signature requirement on the “Assign Objects Approval Cycles”.

Workflow

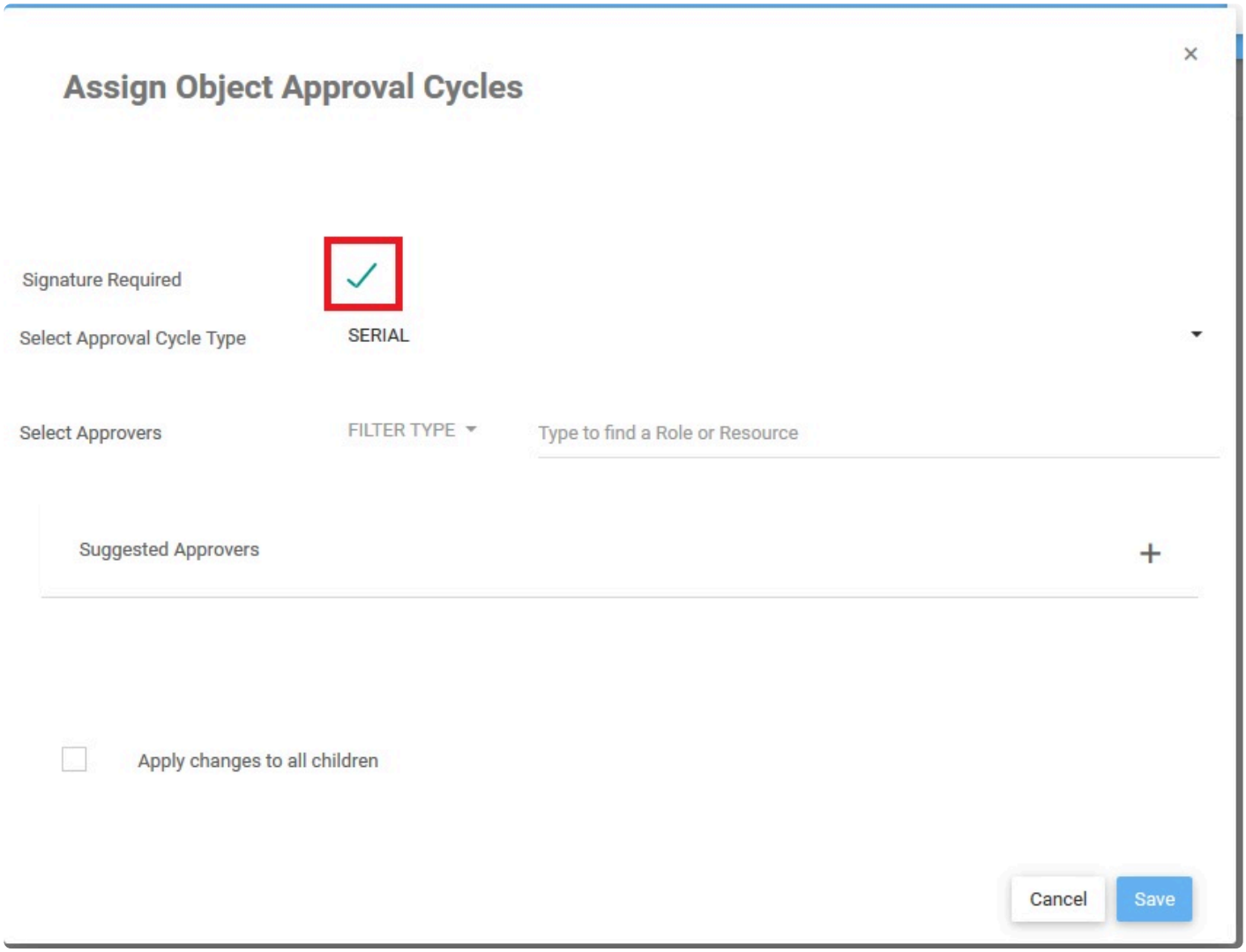
1. Navigate to the **Details** or **Graph** page



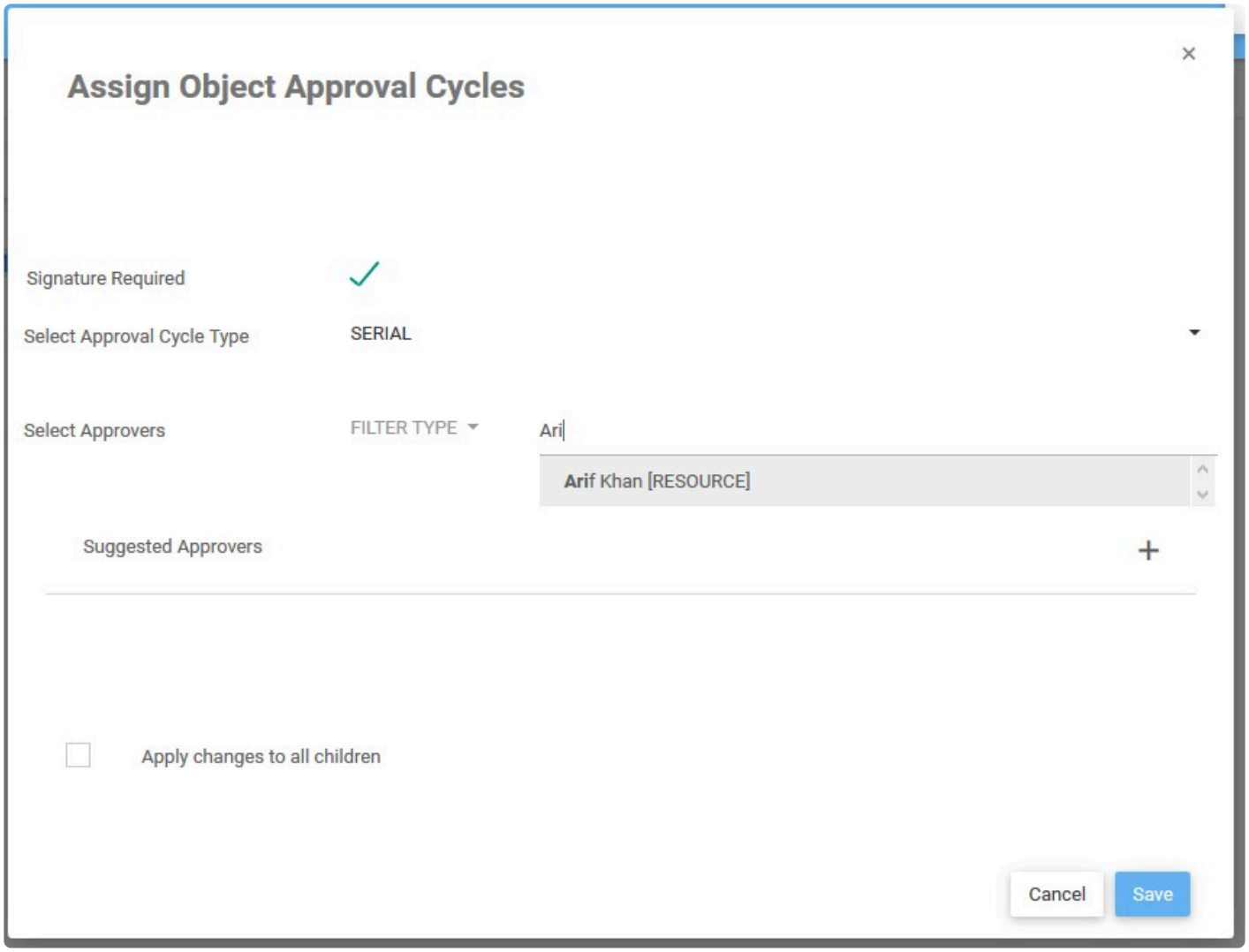
2. Click on **Edit** button and select **Approval**



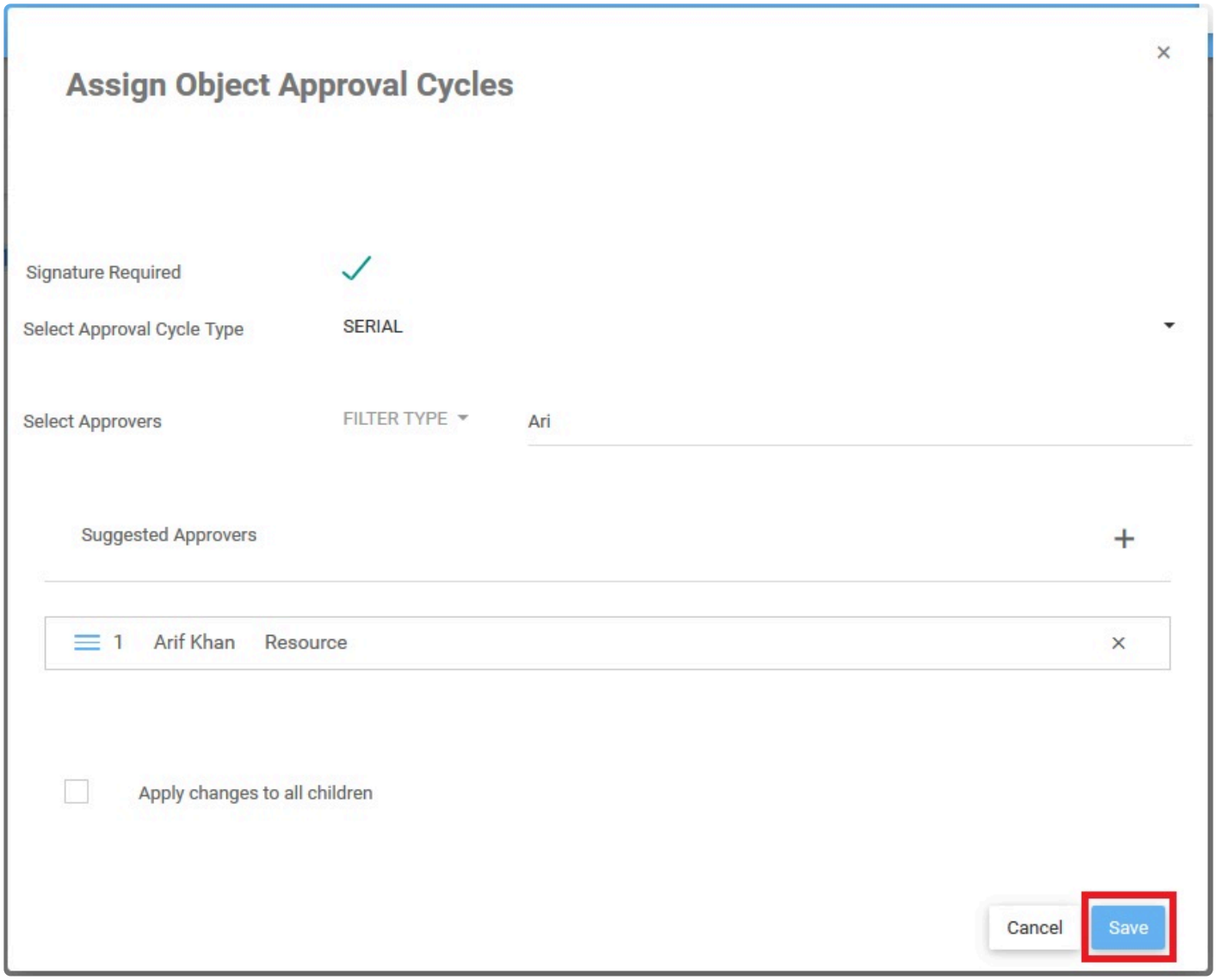
3. Select **Signature Required**



4. Select your approvers in the **Assign Objects Approval Cycles** window



5. Click the Save button


Assign Object Approval Cycles
Signature Required
Select Approval Cycle Type
SERIAL
Select Approvers
FILTER TYPE
Ari
Suggested Approvers
1
Arif Khan
Resource
Apply changes to all children
Cancel
Save

7.1.6.3 Signature Authentication

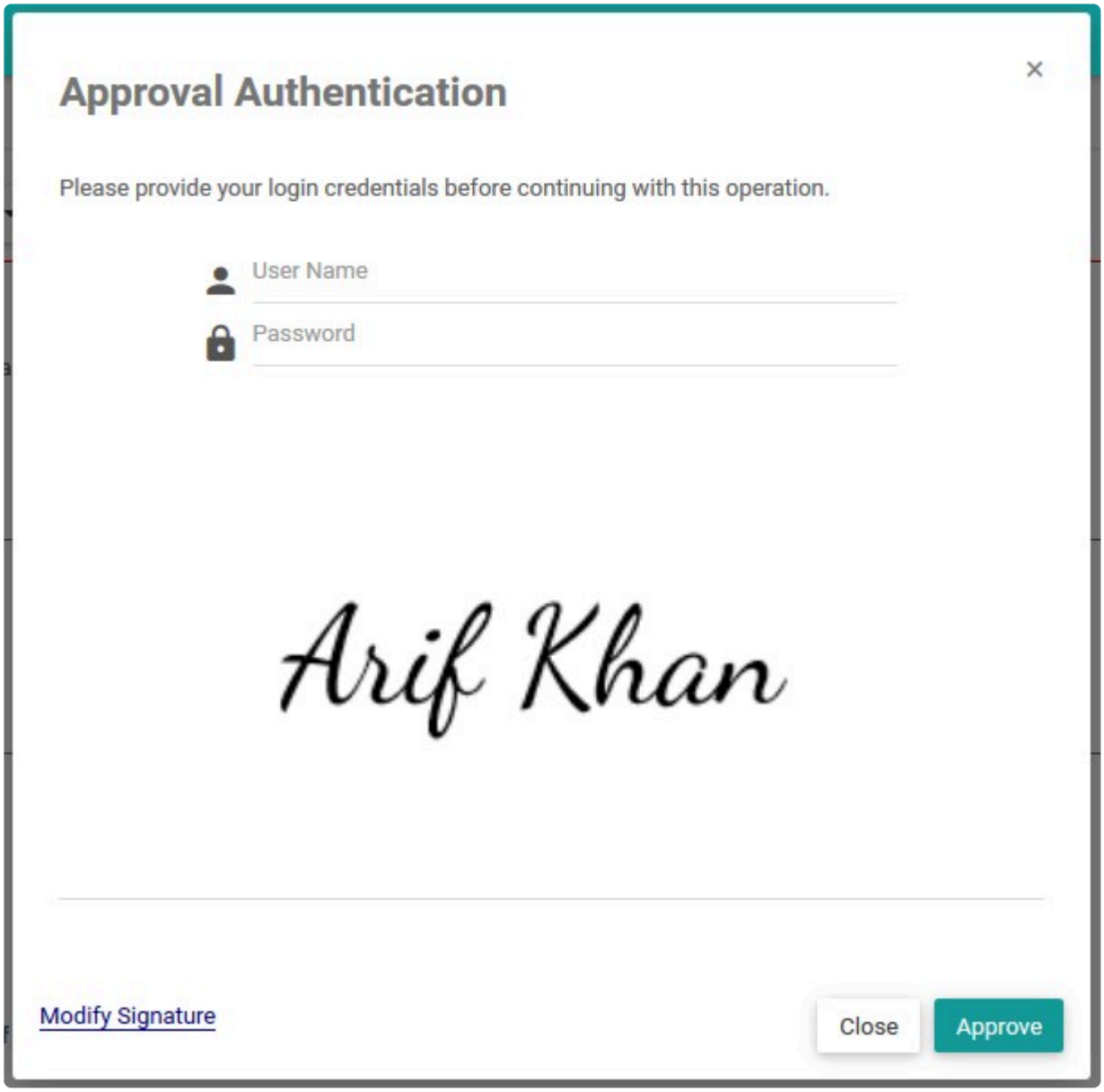
A signature is needed to authenticate approvals on important processes and other changes in documentation of the company, and to bind the individuals signing to the approval cycle.

Authentication Workflow

If the **Signature Require** is enabled in **Assign Object Approval Cycles**, then the users will be prompted with an authentication menu when they decide to approve the object.

The authentication window will prompt user to insert:

- their username,
- their password,
- and their signature (please consult here to learn more on how to insert signature)



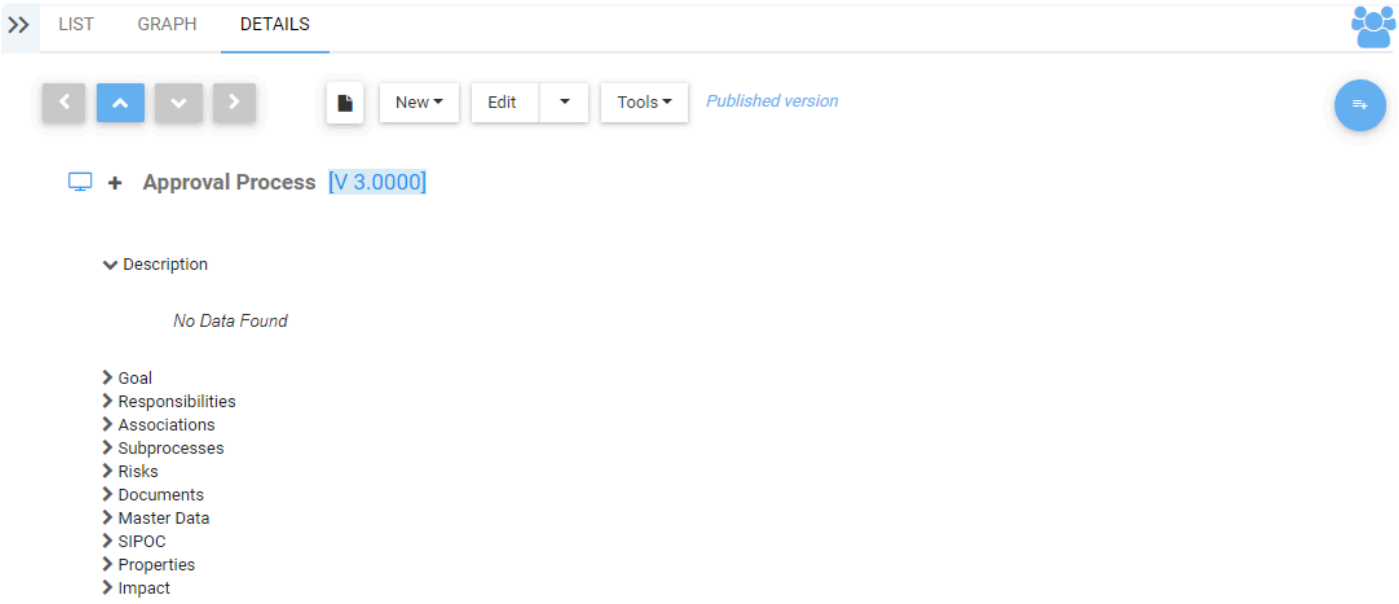
Rule
User is required to be an approver.
The “Signature Required” needs to be checked on by the sender.
The user is not required to insert a signature image to proceed with the authentication process.
If the user never uploaded a signature, and they are approving an object, when the popup appears, then the user will see an image saying “There is no image” and an option underneath to modify the signature.
If the user had uploaded a signature previously, and they are approving an object, when the popup appears, then they will see their signature and an option underneath to modify the signature.
If a user decides to change their signature, they can do this either by pressing the **Close** button and clicking on their profile or by clicking on **Modify Signature** which will navigate to the profile page

7.1.6.4 Downloading & Previewing Published Approved Document

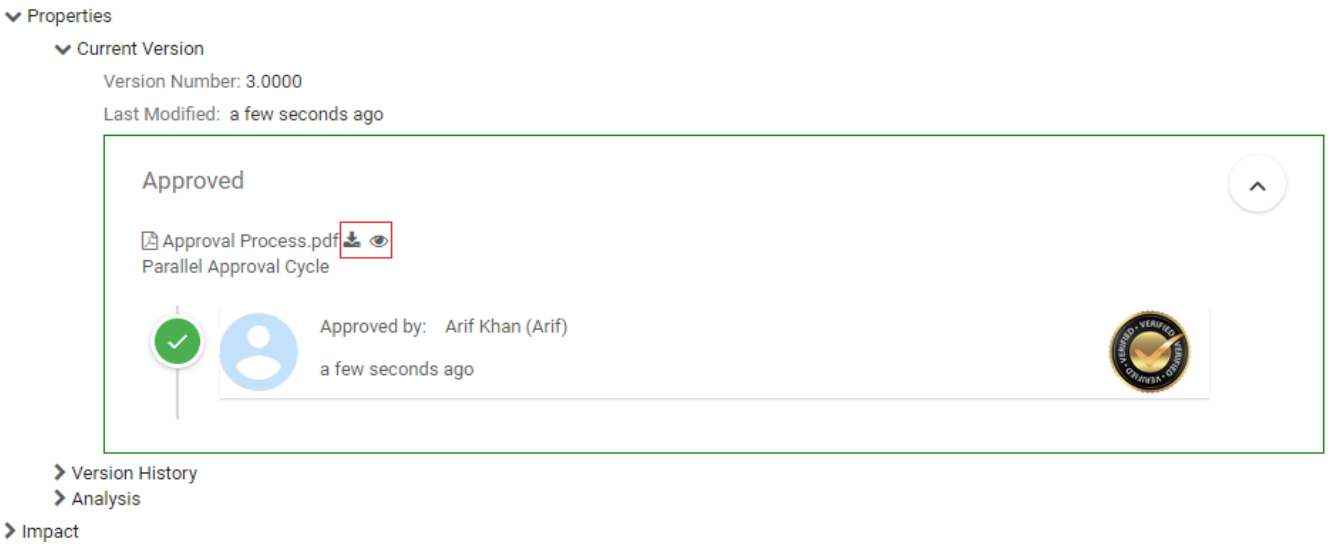
Once an object has went through the signature compliance and the approval process, then an auditor can go on the version history and review the signed document.

Review Signature Document Workflow

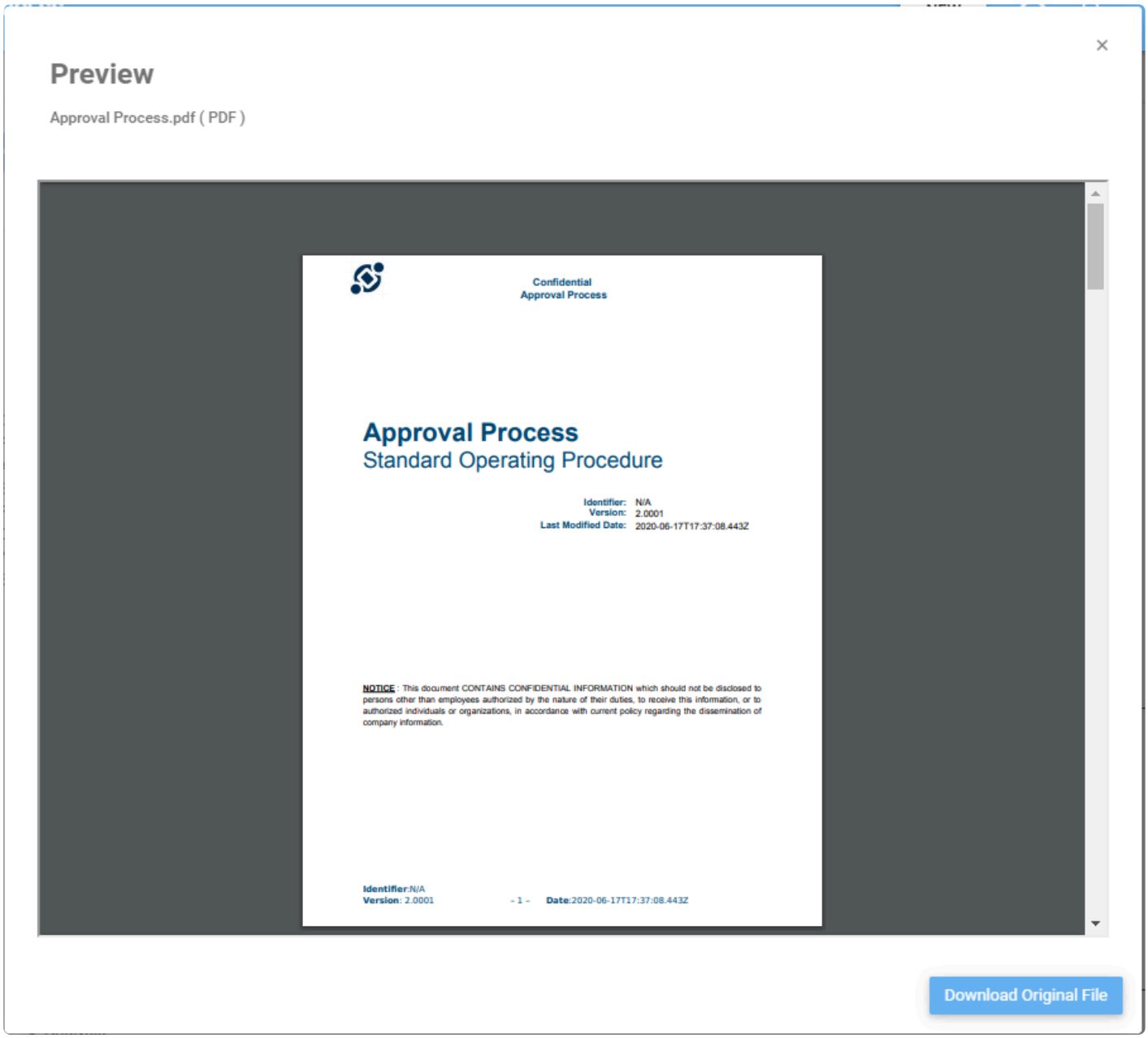
1. Navigate to the object details or graph page



2. In **Details** menu, under **Properties**, expand the **Current Version**



3. Preview or download the signed document.



Rule
The name of the document is equal to the name of the object that was sent for approval plus the prefix of “Signed Document”
The option to download the document is available after it was published
Given that the user A has approved the object and the object is in publish status after it was approved, when an admin decide to remove the user A permission from the environment, then the signature of user a will still appear in the document
Given that the user A has approved the object and the object is in publish status after it was approved, when an

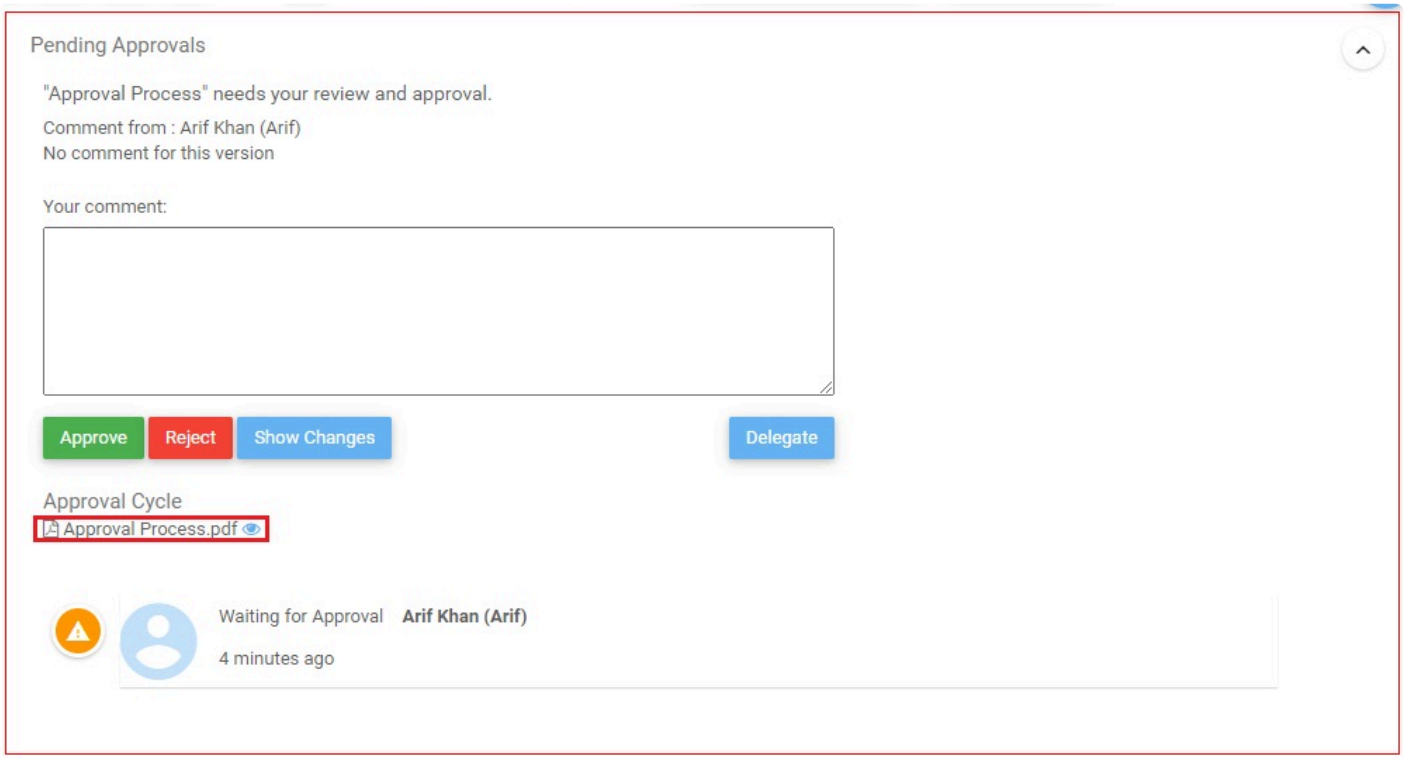
admin decide to delete the user A from the system, then signature of user A will still appear in the document
Given an object is in approval status and signature was enable, when a modeler deletes the object before it was published and after restores the object, then the users will not be able to view/ download the document book since they are in draft version
Given an object is in published status after it was approved and signature was enabled, when a modeler deletes the object and restores the object, then the user will be able to download the signed book of the current version
Given an object is in published status after it was approved and signature was enabled, when a modeler decide to browse to a previous version of a an object, they can download the document before they revert to the object.
Given an object is in published status after it was approved and signature was enabled, when a modeler decide to localize that version, the the localized version will not have the signed book and the option is not available
Giiven an object is in published status after it was approved and signature was enabled, when a modeler decides to reference that object, the reference version will not include the approval history nor the document

7.1.6.2 Previewing Document

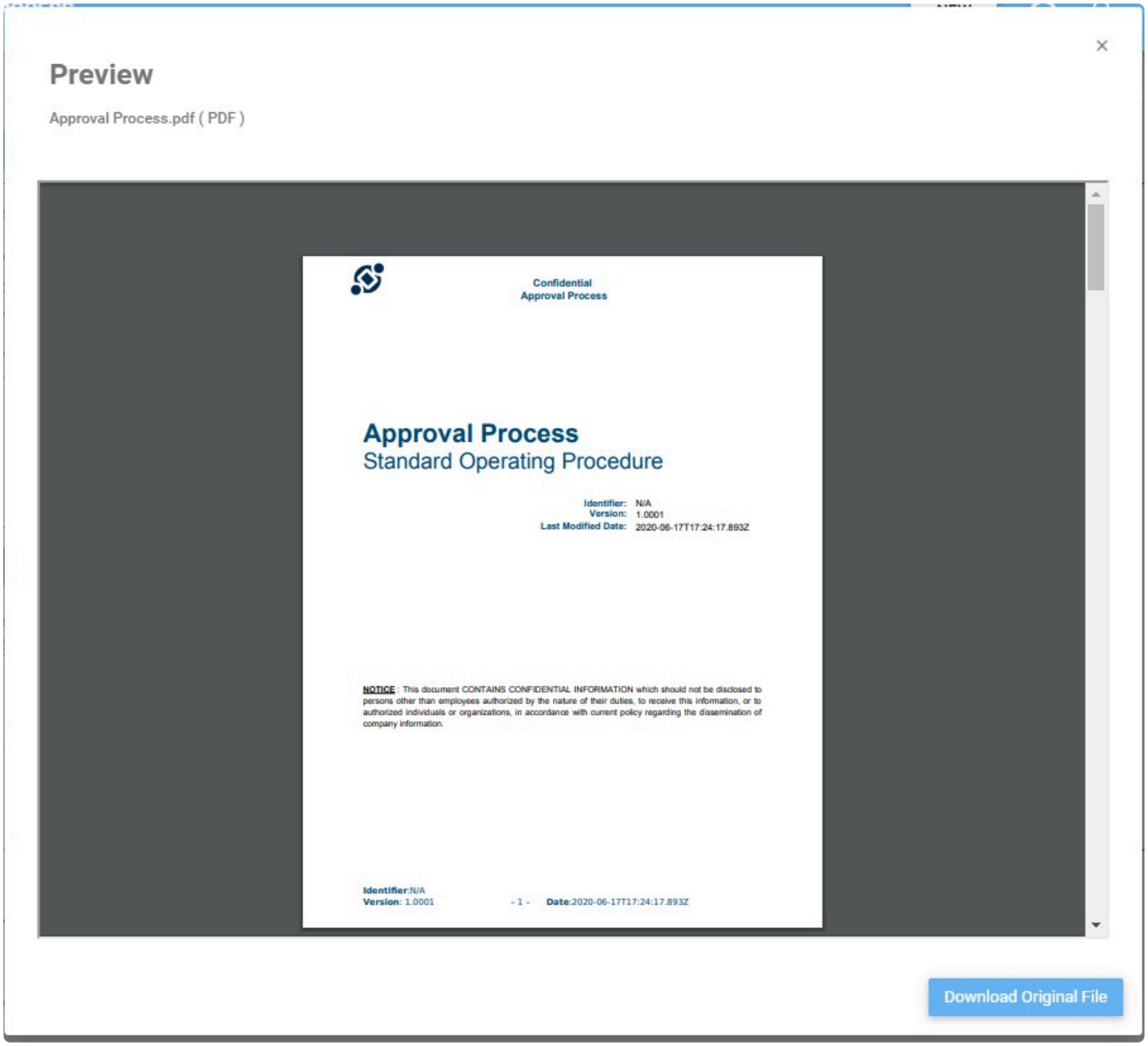
After an object has been sent for approval cycle, the information from the object is generated as a document so approvers can assess, analyze and evaluate the required changes.

Approver Workflow

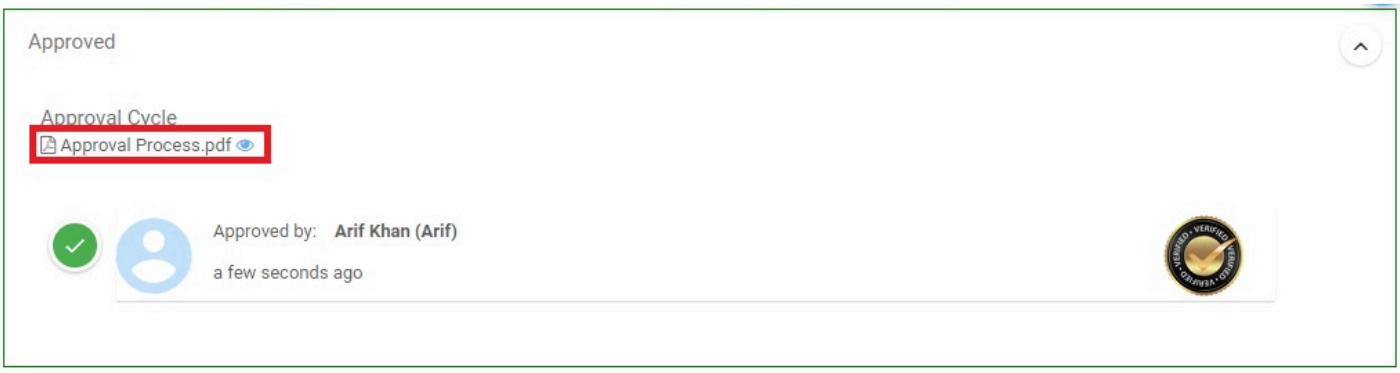
1. Navigate to the object in approval cycle and opens the Pending Approval box



2. Assess, analyze and evaluate the document that was sent for approval by clicking on the preview icon



3. Approve the object (please consult here for more information on how to approve)
4. View the document after it has been approved in the approval box



5. View and download the document after it has been published

Rule
The name of the document is equal to the name of the object.
The option to view the document is available in the pending approval box, in the approval box after it was approved and in the approval box after the object was published.
The document will show the info on the version that it was sent for approval.
When approver A approves the object, and then approver B decides to preview the document, then the approver B will see the signature of everyone that had signed at the bottom of the PDF document.
Given that a user A is in an approval cycle as a resource or a role, when the user A approves the process, and a modeler removes the role that the user was part of from the object, then the signature will still appear in the document since the user A approved it (vice-versa if the user resource was removed, but the role remained as an approver).
Given that the user A approved the object and the object is in approved status, when an admin decides to delete the user A from the system, then the signature of user A will still appear in the document
Given that the user A has approved the object and the object is in approved status, when an admin decides to remove the user A permission from the environment, then the signature of user a will still appear in the document
Given an object is in **Sent for approval** status and signature was enabled, when a modeler decides to browse to a previous version of a an object, they can download the document before they revert to the object.
Given an object is in **Sent for approval** status and signature was enabled, when a modeler decides to **localize** that version, the the localized version will not be in send for approval status book and the option to view the document will not available.
Given an object is in **Sent for approval** status and signature was enabled , when a modeler decides to

reference that object, the reference version will not include the approval history nor the document.
Given a user approves an object, then the signature is added into the document.

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.

© 2020 Interfacing Technologies Corporation

7.3 Endorsement Cycle

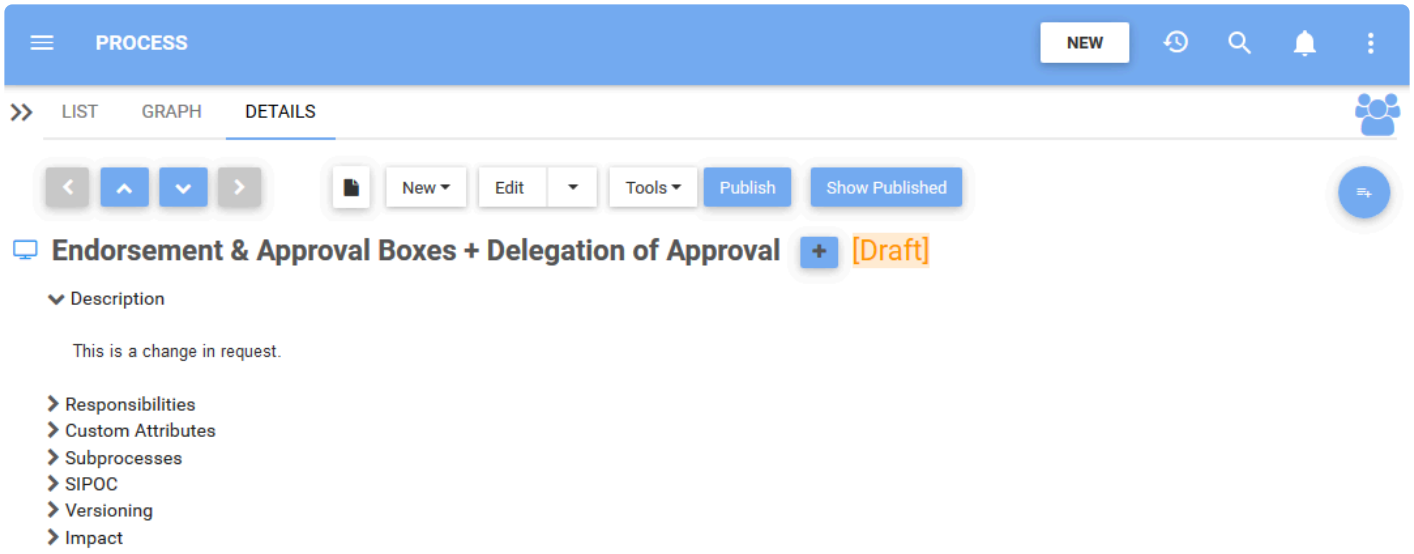
Endorsement cycles often involve multiple individuals before changes can be implemented. This is often the case as business activities that are analyzed from different vantage points and subject to change may require multiple edits before producing a finalized result. Serving as an additional method for review, the endorsement cycle generally precedes an approval cycle; endorsers collaborate on a business activity to generate an error-proof version of an activity. Additionally, as the endorsement cycle progresses, a user with the appropriate level of security may stop the cycle at any point in time (e.g., after any given iteration).

Endorsement Cycle	Description
Parallel	All endorsement requests are simultaneously sent to endorsers. Endorsers choose to either endorse or not endorse a specified object. The status of an object's endorsement may be consulted throughout the cycle; the cycle may be stopped at an endorser's discretion (granted they have the appropriate security permissions). E.g. A request for endorsement is sent out to multiple product owners, simultaneously, before being sent for approval to c-level executives.

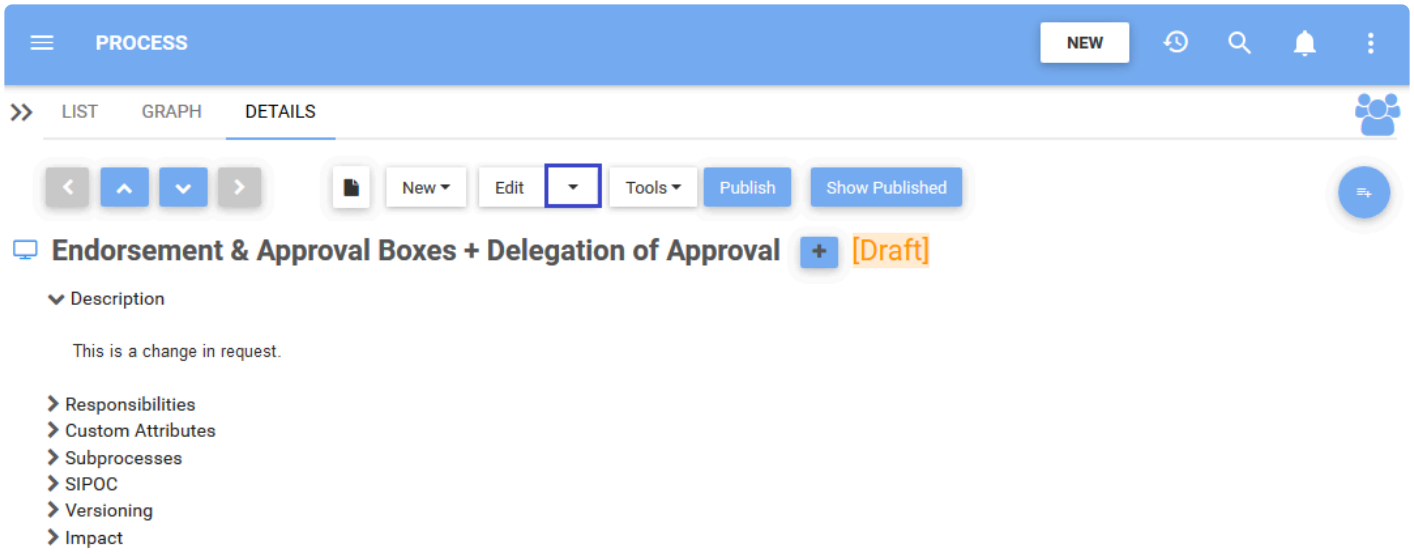
Web Modelers can set an endorsement cycle for all EPC objects. The Endorsement button is available on the toolbar under the object's Details tab.
Web Modelers need to ensure they have the permission to be a Web Modeler, their displayed content is set to Show Latest, and their editing tool is the Web.

Follow the instructions to set an Endorsement Cycle

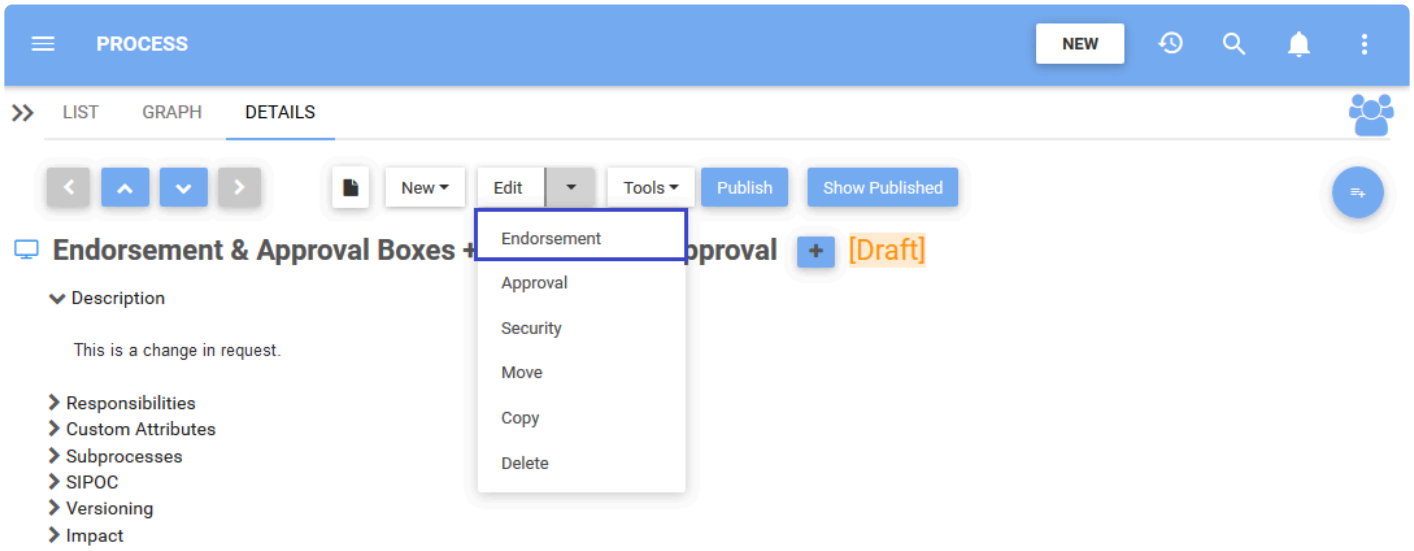
1. Navigate to the details section of the object. In this example, a document



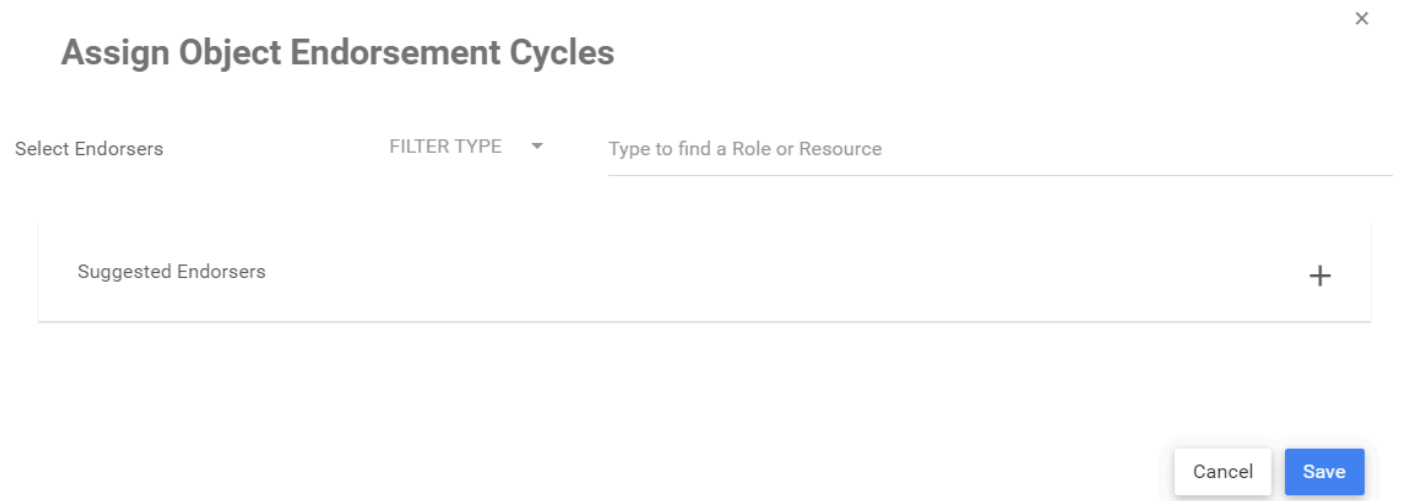
2. Navigate to the box



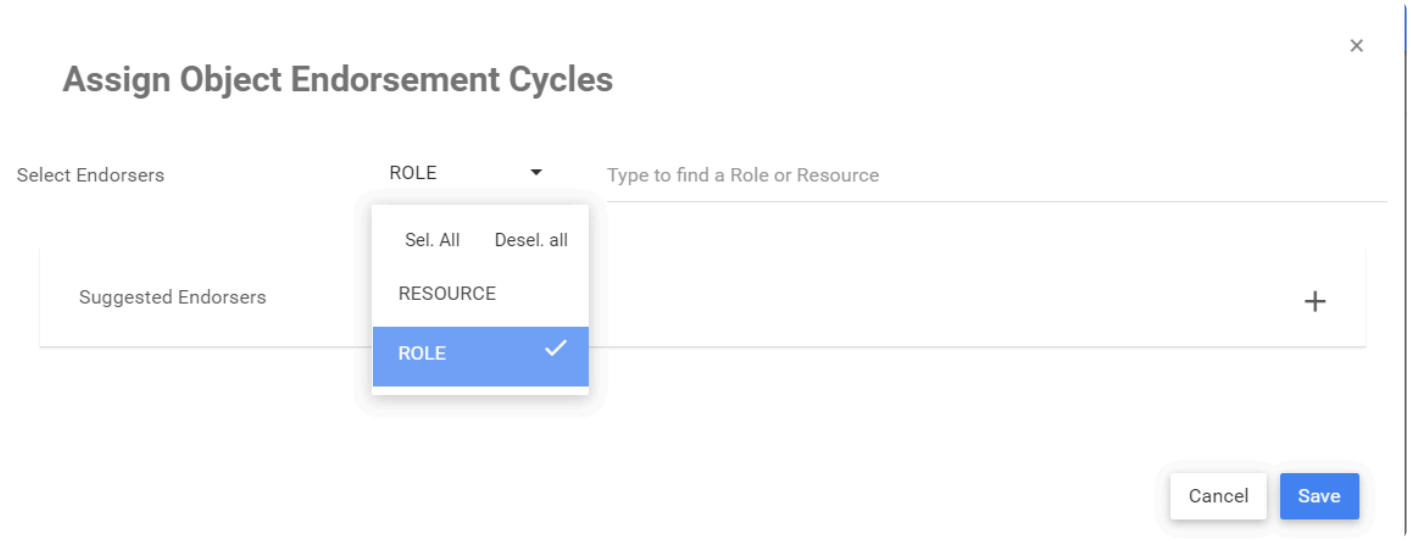
3. A drop-down menu will be generated. Choose the “Endorsement” box



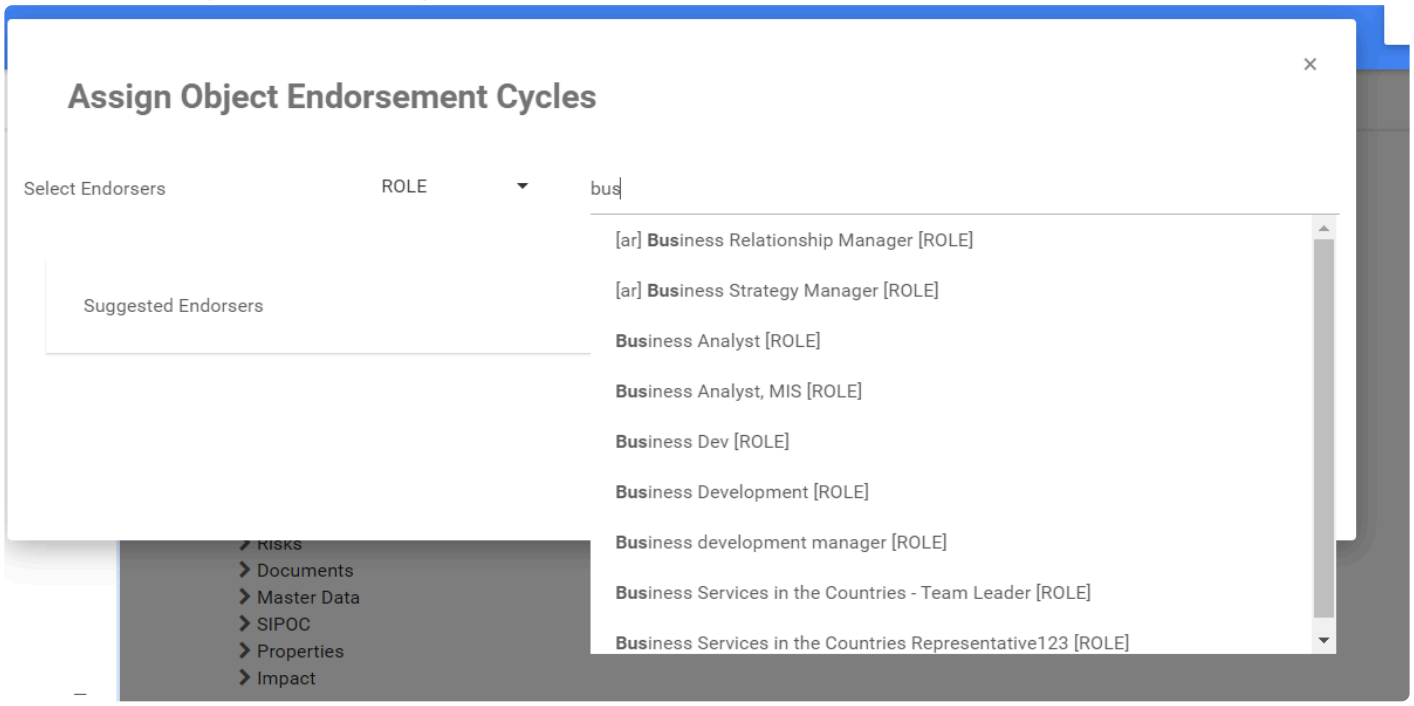
4. You will be redirected to the Assign Object Endorsement Cycles window



5. Navigate to “Select Endorsers” and select a filter

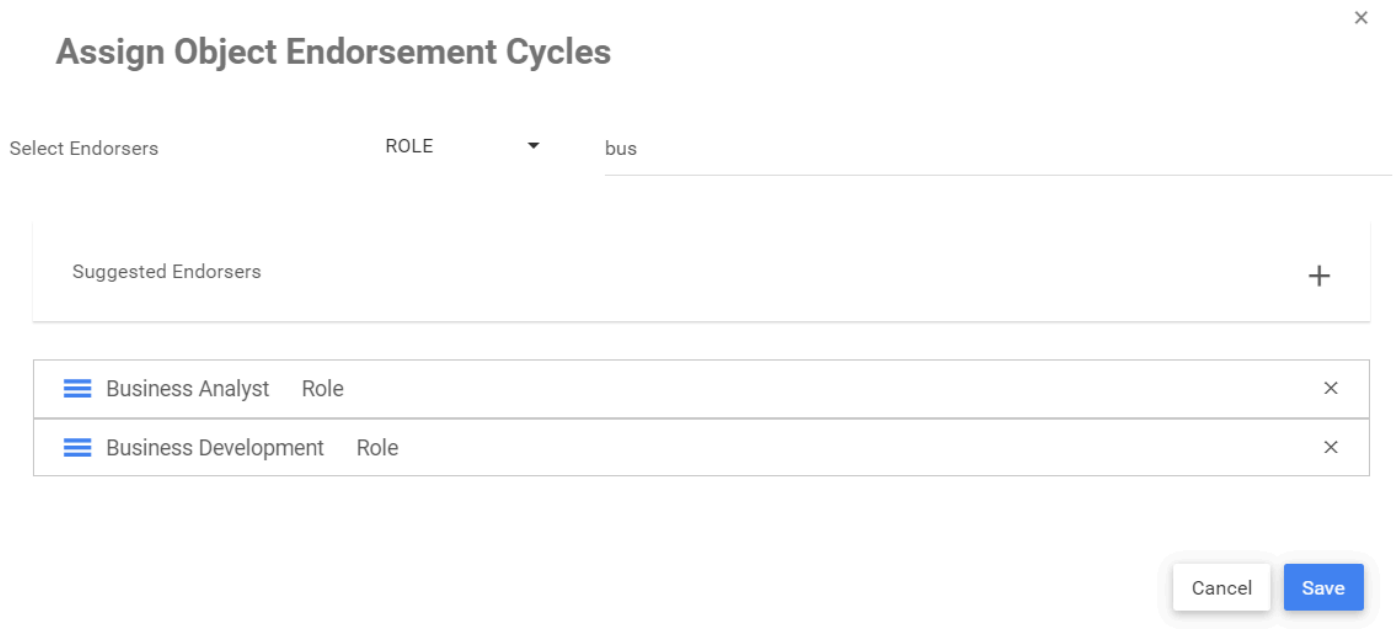


6. Type the name of the Role you want to assign as the endorser. From the search suggestions, click to select the Role you want to assign



The list of roles will populate based on keyword typing

7. The Role(s) and/or Resource(s) assigned as endorsers will appear in a table



To remove endorsers from an Endorsement Cycle, click on the “x”

8. Save the Endorsement Cycle

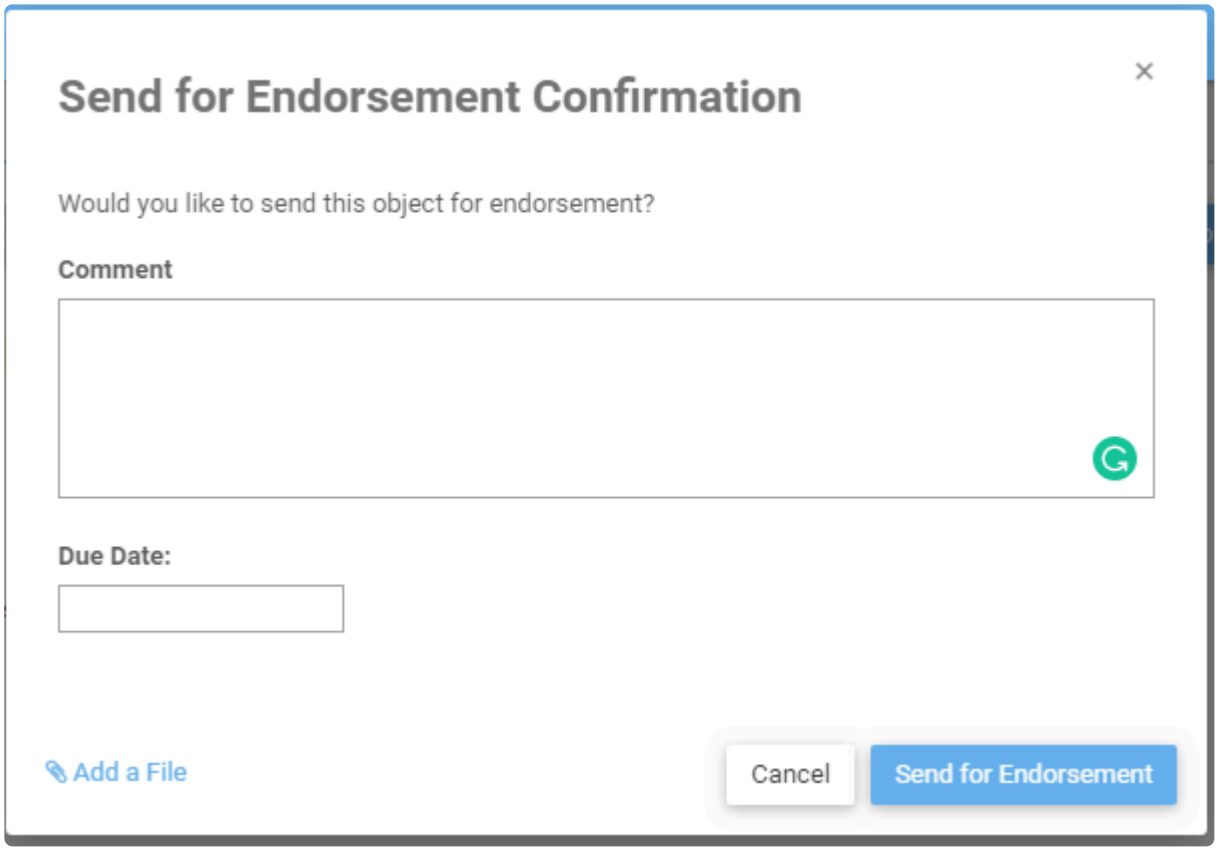
Once the object has been successfully been approved by endorsers in the cycle, the Web Modeler will be able to publish the object.

7.3.1 Sending Endorsement

After a user has created a list of endorsers and has made changes to an object, the user will initiate an endorsement cycle by clicking on the “Send for Endorsement” button.

The content of “Send for Endorsement Confirmation” includes:

- A comment section for the author
- A due date which indicates the date when an endorsement cycle ends and by when all the endorsers should provide their action
- An insert tag to attached a document



Rules

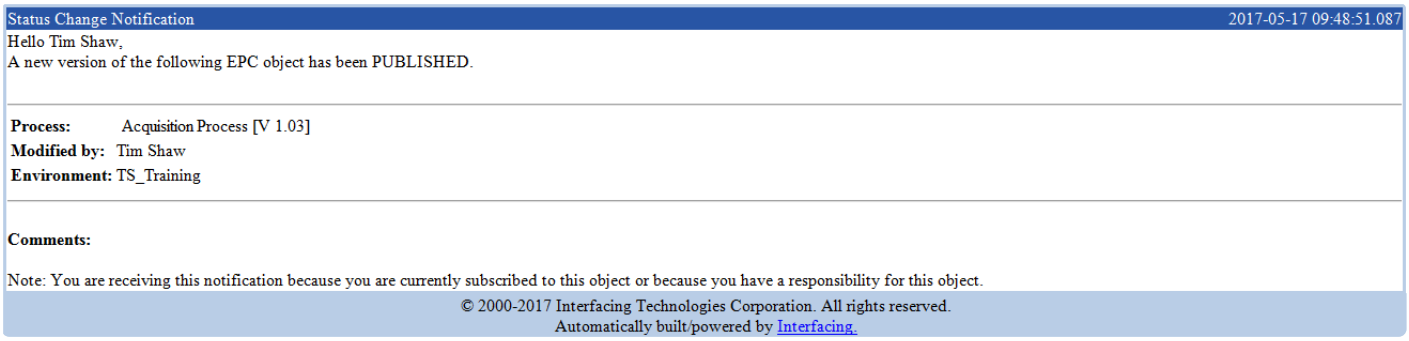
- User can only view the “Send For Endorsement Button” after a list of endorsers were created and the object in question is being edited
- User needs to have read/write permission, be on draft mode and in the latest version of the object in order to send it for endorsement
- User can send an object for endorsement without adding a comment, a due date or by attaching a document

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.

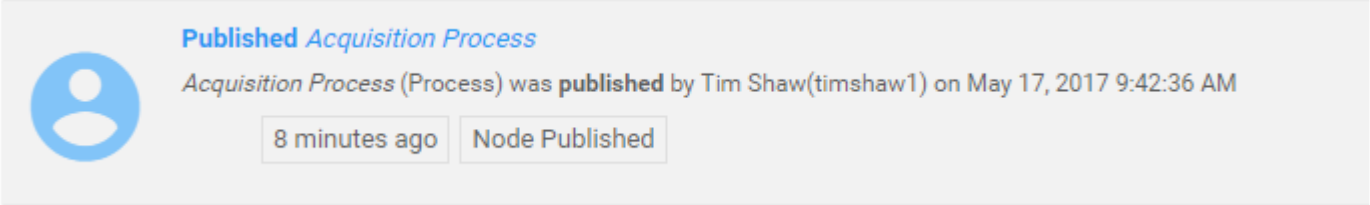
Process: Acquisition Process [V 1.03]
Modified by: Tim Shaw
Environment: TS_Training

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

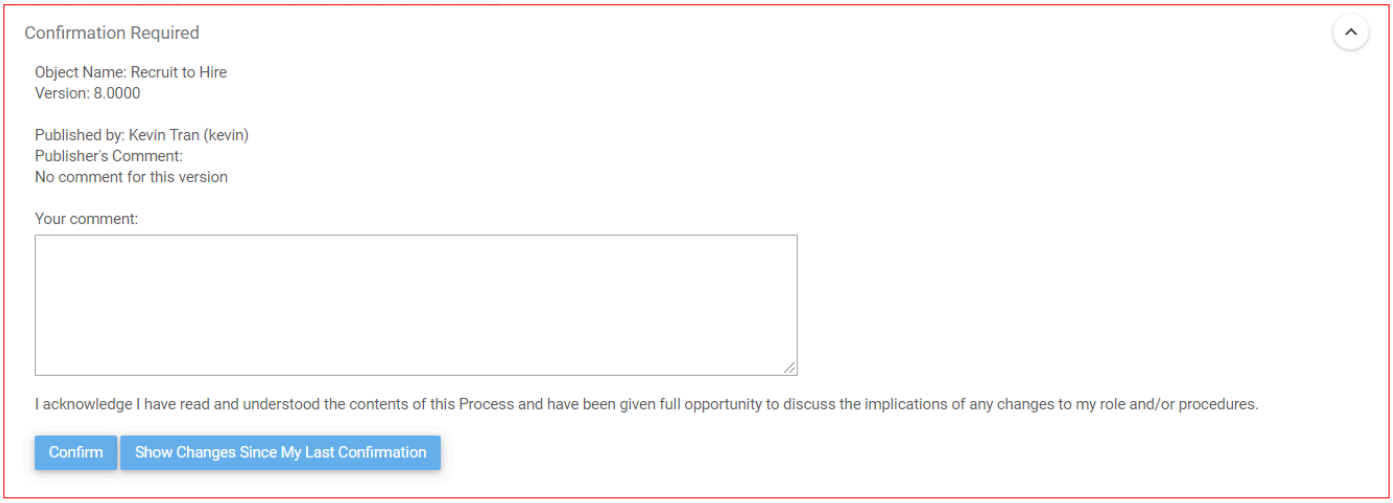


Published *Acquisition Process*

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: Recruit to Hire
Version: 8.0000

Published by: Kevin Tran (kevin)
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 | Show Changes Since My Last Confirmation

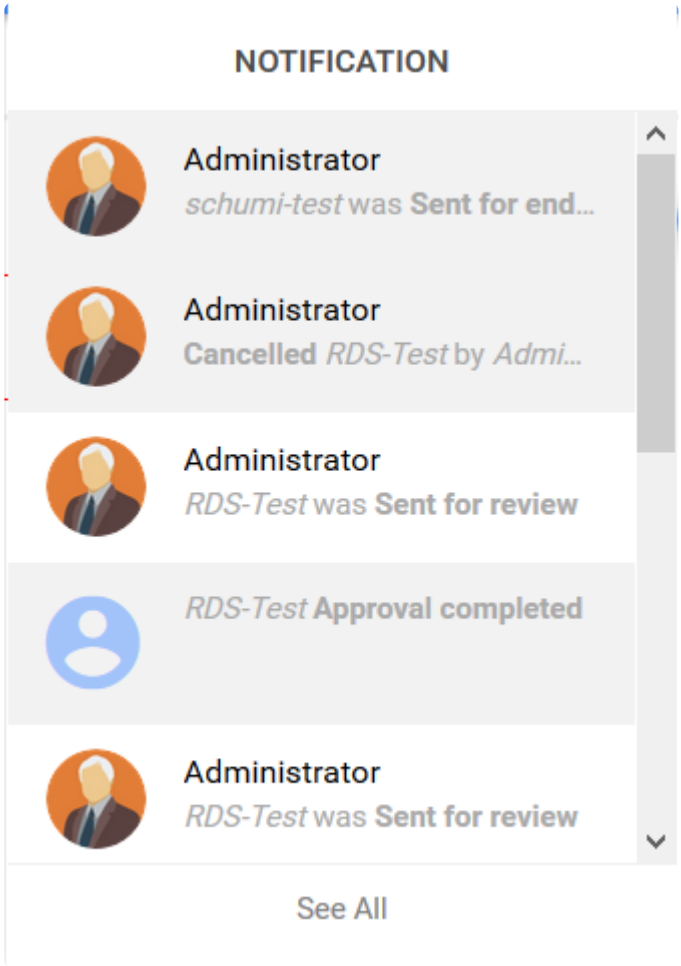
Show Changes Since My Last Confirmation

Users who wish to compare the current published version with the last version they have confirmed can use the **Show Changes Since My Last Confirmation** button. Upon clicking the button, elements that were added will be highlighted in green and elements that were removed will be highlighted in red. Note that this button will be disabled if the user has never confirmed an object.

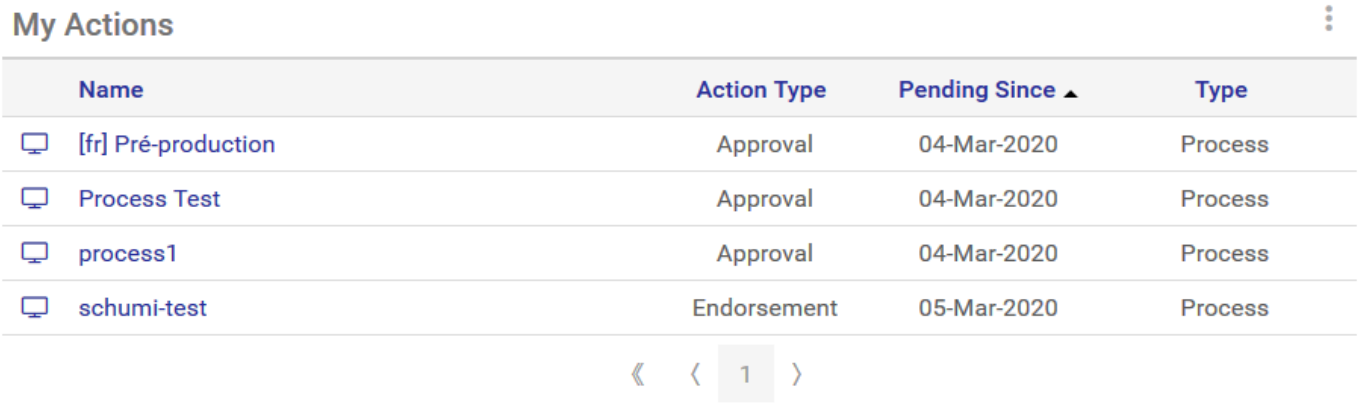
7.3.2 Participating in An Endorsement Cycle

1. After an EPC Modeler has Drafter a change to an object and sent this object in for endorsement, user assigned as an endorser will receive a notification within the EPC Web APP and through email. Until the endorsement is either completed by all endorser, stopped or canceled by the author, the object in question will be in “Pending”.

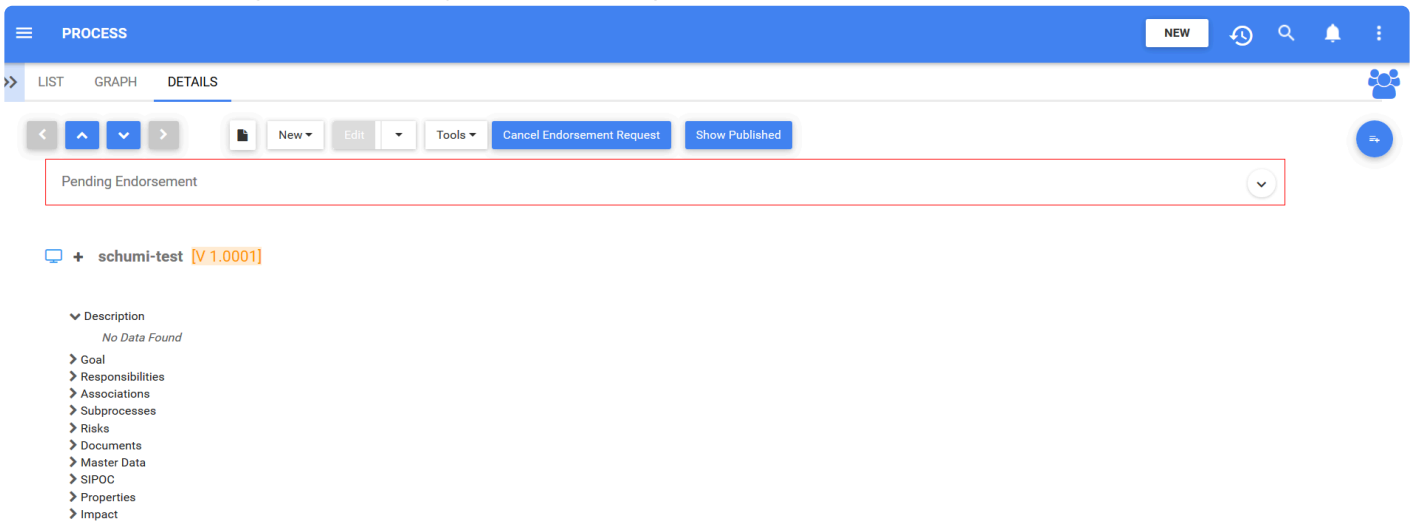
2. User can navigate to their “My Pending Endorsement” of the specific object by selecting it in the notification



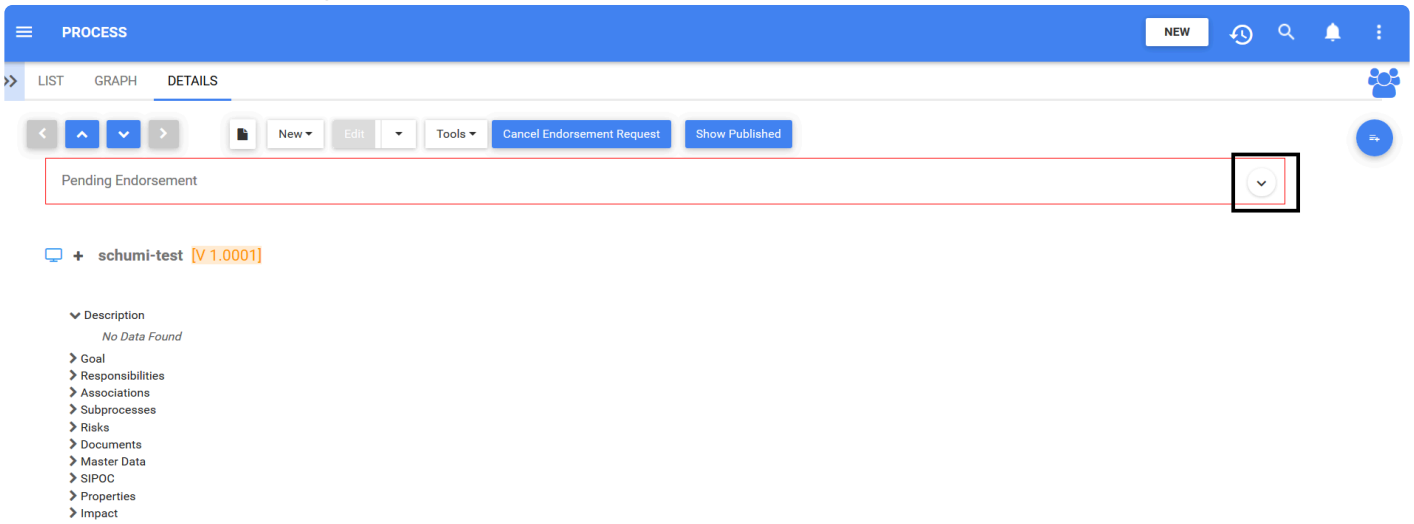
Or through their “My Action” Widget.



3. User will be navigated to the object's details page.

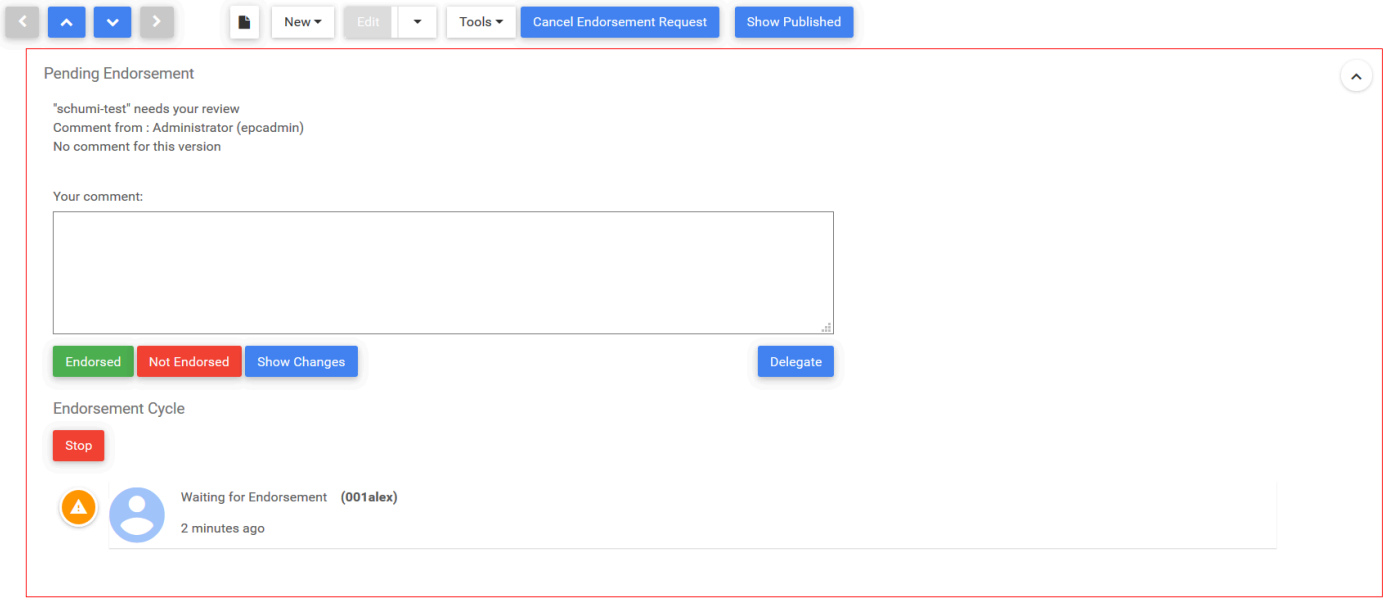


4. To expand the pending endorsement, select the

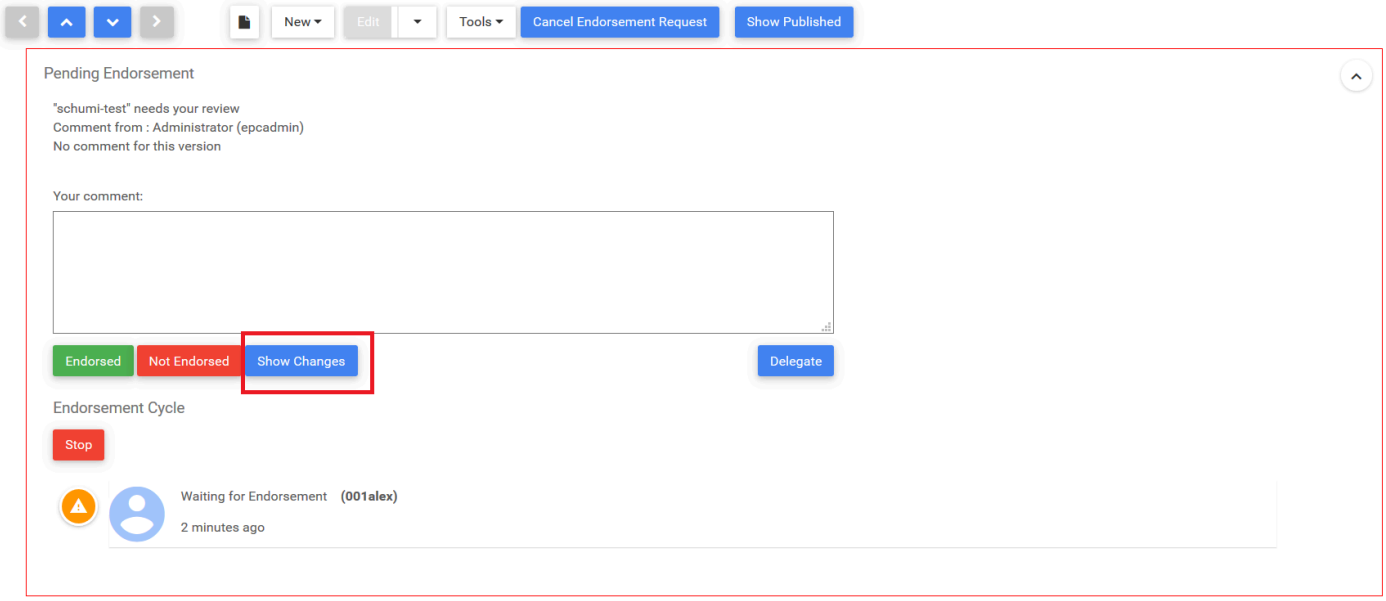


5. This will expand the Endorsement Request, providing the user with additional information about the

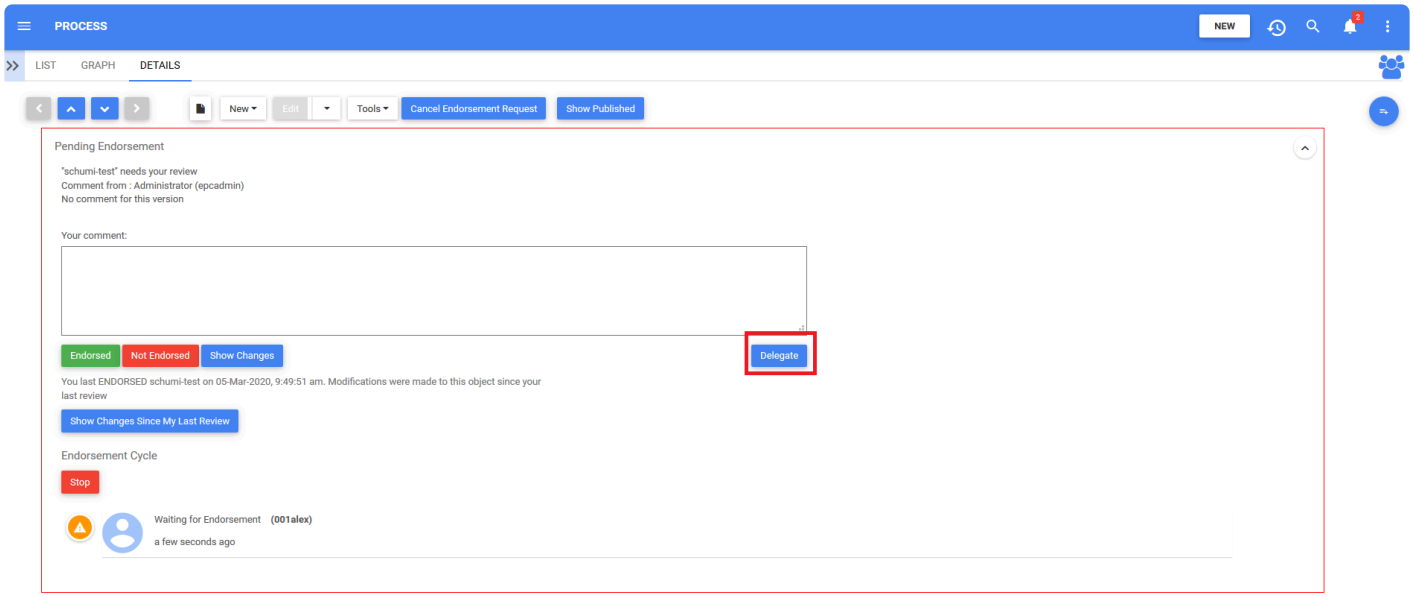
proposed change.

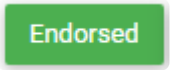


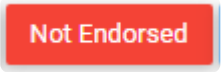
6. For further detail regarding a change in the object, the user can select the Show Change button. If more information are needed “Show Change” please click here.



7. The delegate feature in Endorsement allows the user to reassign their task for the current cycle. If f more information are needed about “Delegate” please click here.

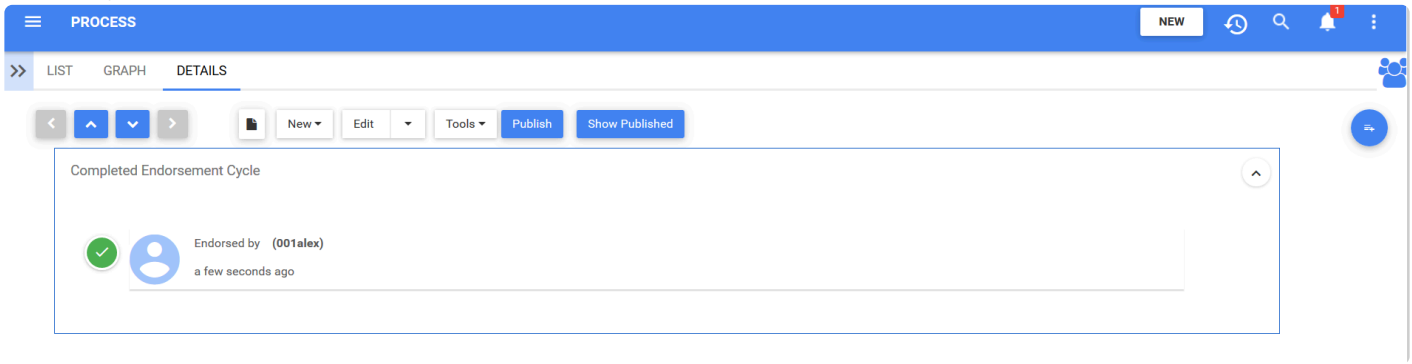


8. After analyzing the proposed changes, the user can either 

or 

the proposed improvement. Once all endorser has acted upon the request, the object will move to the next phase of endorsement cycle.

9. Once endorsed, the object will not be automatically published or send for approval, it will have to be done manually.



Rules

- If there is no endorsement cycle and no approval, as a user, I can directly publish
- If there is no endorsement cycle and there is an approval cycle when I edit a new version of an object, I have to go to an approval cycle before publishing
- If there is endorsement cycle and no approval cycle when I edit a new version of an object, I have to go through an endorsement cycle before publishing
- If there is a list of endorsers and a list of approvers, then the user will only view the “send for approval” button after the endorsement cycle is stopped or completed
- If an endorsement cycle is undergoing, then the edit option is locked until the cycle is stopped, completed or cancelled
- If an endorsement cycle has been cancelled by a user, then it should return the object from under

revision to in-progress, keep the same version

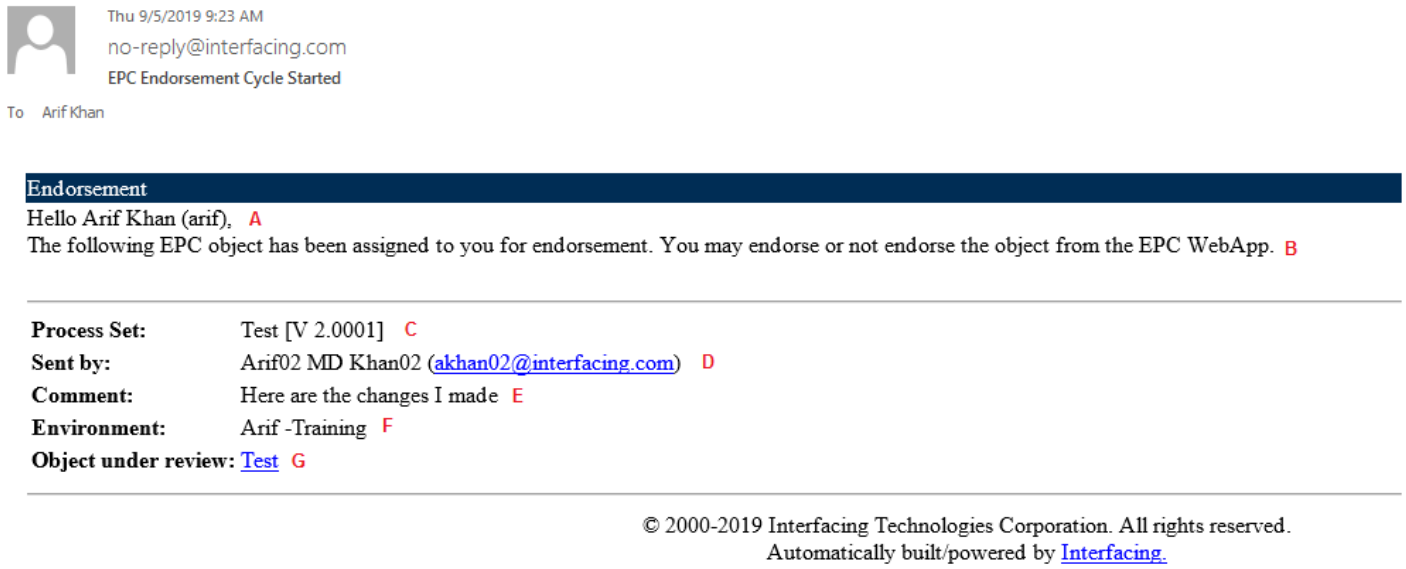
- If an endorser does not have write edit when they click on the Pending endorsement box, then they should not see the stop button

7.3.3 Notifications Emails

Users involved in Endorsement Cycle Activities will be sent notification emails when event takes place throughout the cycle. This means that the user will be notified via email, as well in the EPC Web App, when activities pertinent to users take place.

User will receive notifications under the following circumstances:

- When endorsement cycle is initiated and sent to the endorsers
- When an endorser has voted
- When the endorsement cycle is canceled
- When the endorsement cycle is stopped or completed


Thu 9/5/2019 9:23 AM
no-reply@interfacing.com
EPC Endorsement Cycle Started
To Arif Khan

Endorsement
Hello Arif Khan (arif), A
The following EPC object has been assigned to you for endorsement. You may endorse or not endorse the object from the EPC WebApp. B

Process Set: Test [V 2.0001] C
Sent by: Arif02 MD Khan02 (akhan02@interfacing.com) D
Comment: Here are the changes I made E
Environment: Arif -Training F
Object under review: Test G

© 2000-2019 Interfacing Technologies Corporation. All rights reserved.
Automatically built/powered by Interfacing.

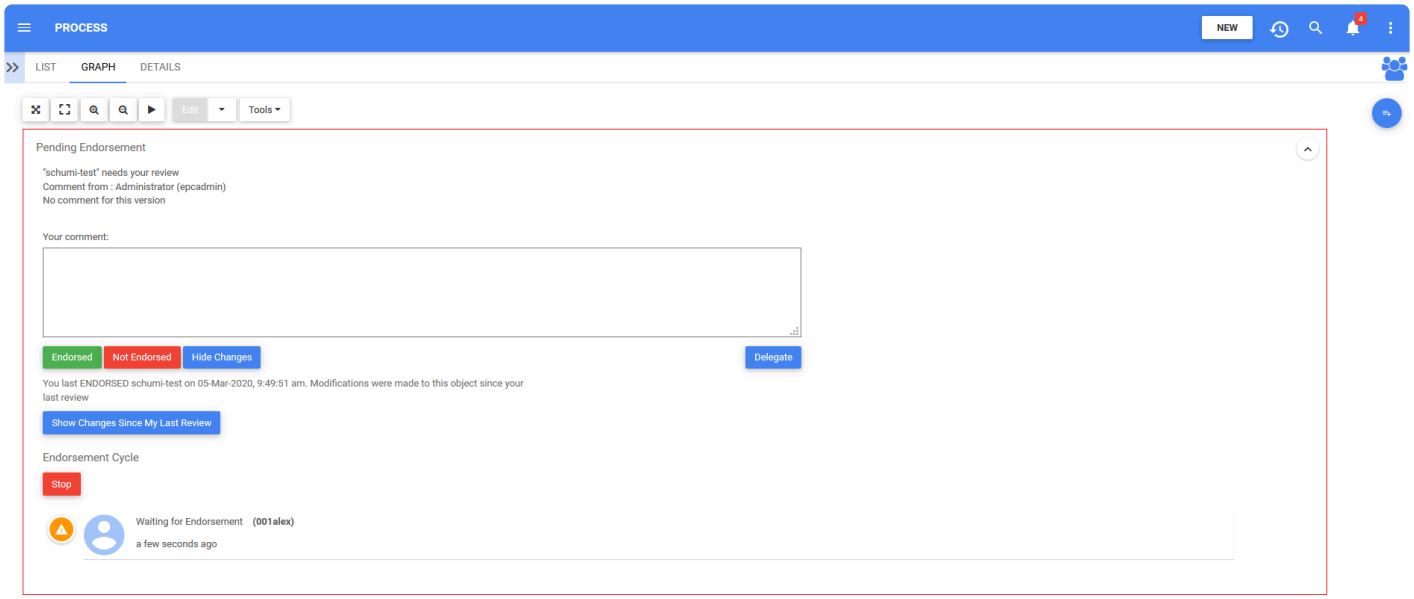
	Item	Description
A	User	The user will be notified
B	Activity	The activity that has generated the notifications
C	Process	The process being reviewed
D	Modified by	The user who has modified the item in question
E	Comment	Additional comment made by the user
F	Environment	The environment where the process is located
G	Link	The link to the process being reviewed

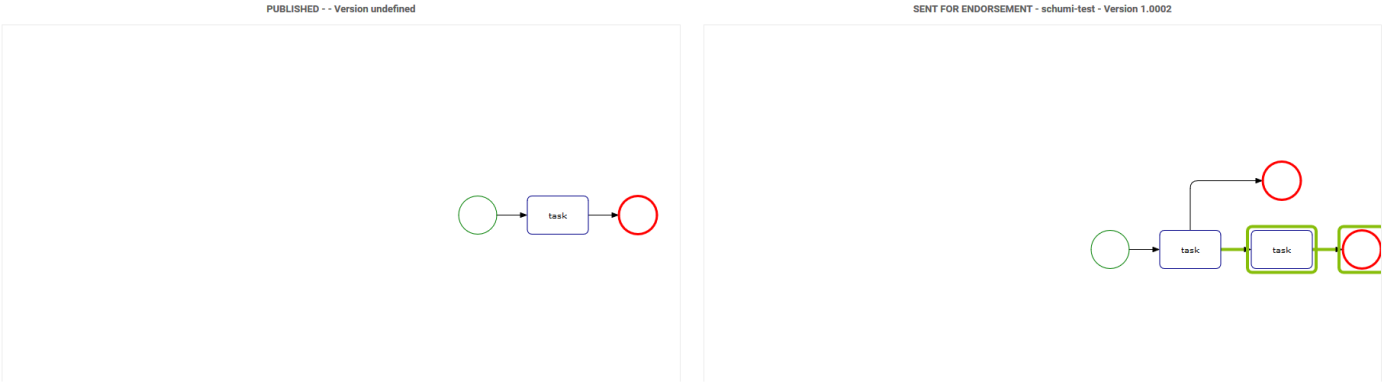
7.3.4 Show Changes

When you are required to act on an endorsement cycle of an object in the EPC, users have the ability to visualize the proposed changes to the objects. Using the “Show Changes” feature, your endorsers can the original object and its details, and see the proposed changed highlighted in green, red, and yellow to help you see what content is new and improved.

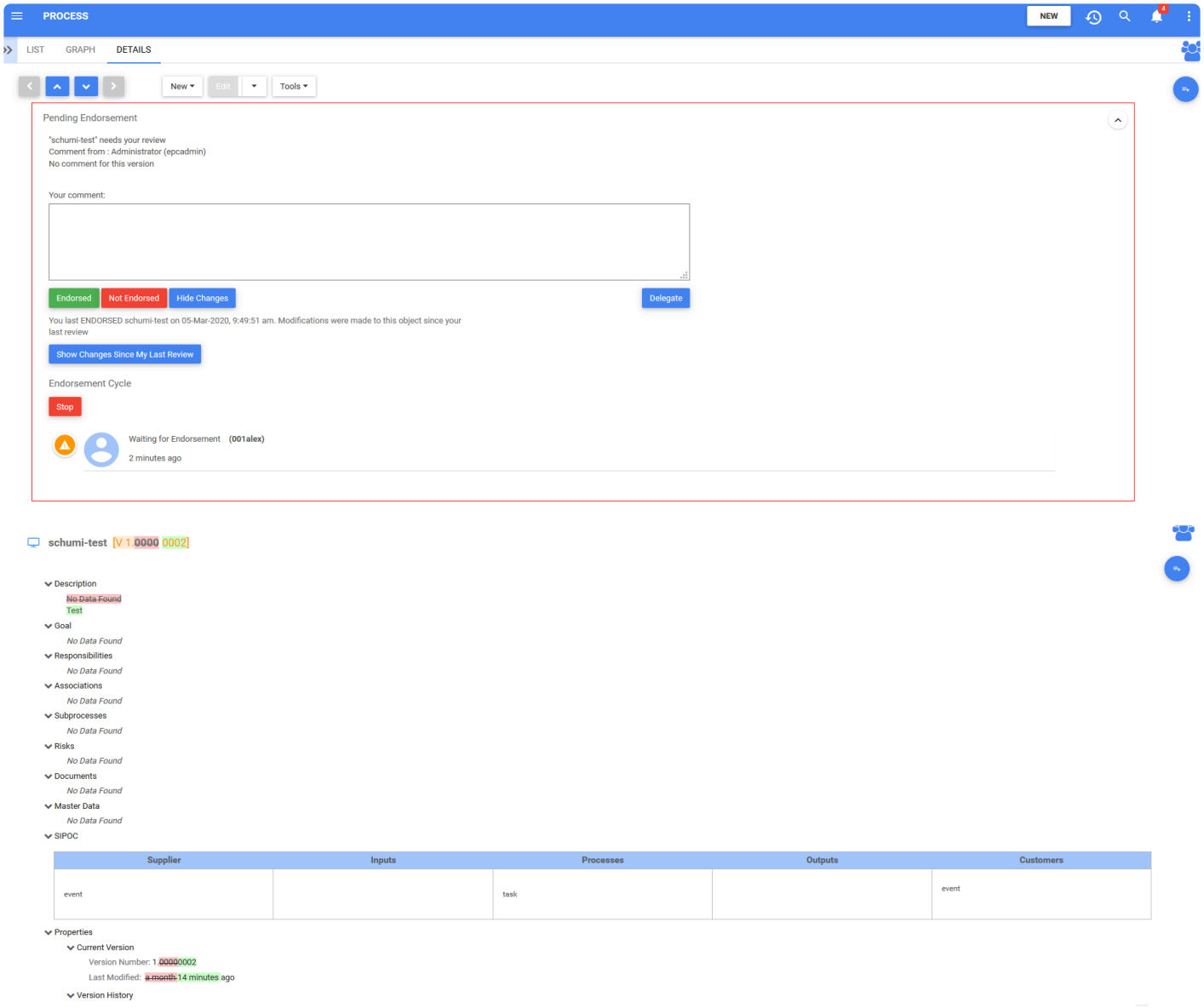
You endorsers can:

1) Visualize Process Map Changes by clicking the “Show Changes” button





2)Visualize a summary of proposed changes in Object Details Page by clicking the “Show Changes” button



Rules:

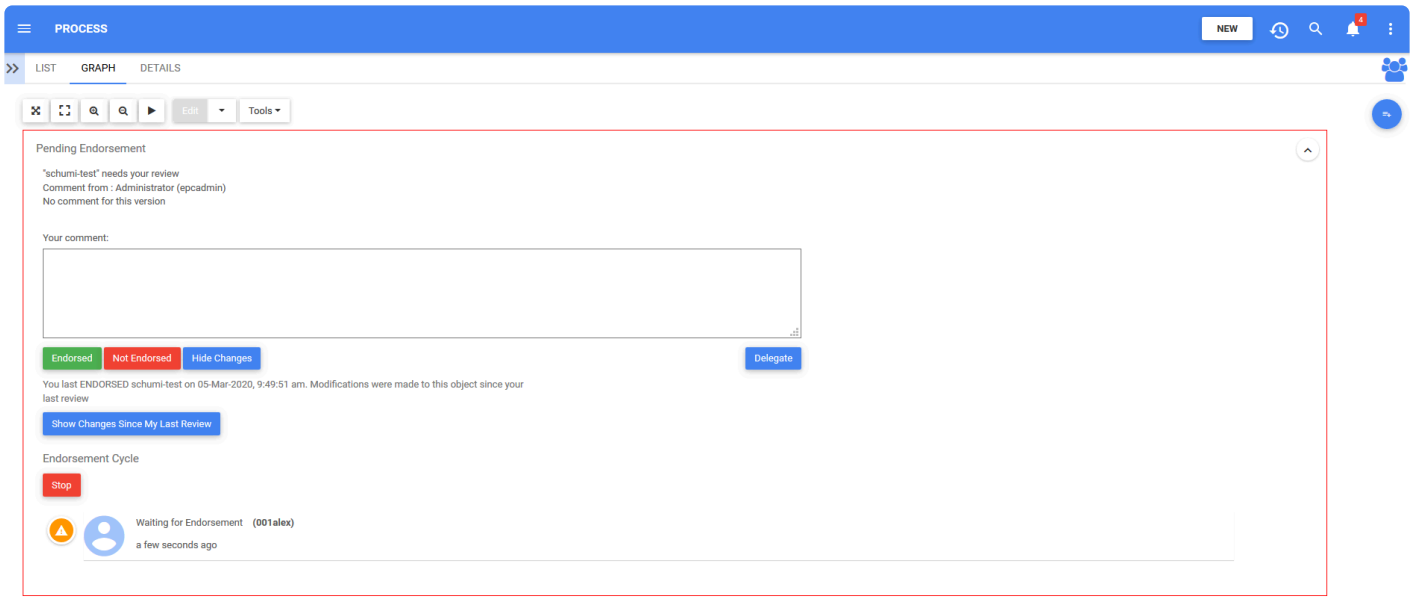
- The show change button will only show the changes from a published version versus the draft version
- When you click on the graph page of an object that has not been published then the user will receive an error

7.3.4.1 Show Changes Since Last Review

An object may go through several endorsement cycles before it get published or sends for approval. The reason to use this feature as an endorser is to see the difference between the latest version and the last version that they revised on an object. An object may pass an endorsement cycle in two ways. The first way is that all the endorsers act on the endorsement cycle by providing their input or the second way is having the author stop the endorsement cycle. In both cases, the endorsers might not remember what changes occurred if there were several cycles in between where the user was removed from the endorsers' list and added later on. This button helps the user see their last revision by comparing it to the latest version.

> The button will only appear if the user previously endorsed or not endorsed on the object.

1. Make sure that you endorsed or not endorsed a change on an object at least once.
2. Within the details tab of the document, expand the endorsement cycle box and click on Show Changes Since My Last Review. Elements that were added will be highlighted in green, and elements that were deleted will be highlighted in red.



Rules:

- The show changes since my last review will show a comparison between the endorsers latest changes (v.1.0001) and the latest version (v.1.0003)
- The show changes since my last review will not appear if the user has never went through an endorsement cycle in that process
- The show changes since my last review will disappear after the object was published (v.1.0 from v.2.0) and reappear if the user made any endorsement in v.2.0

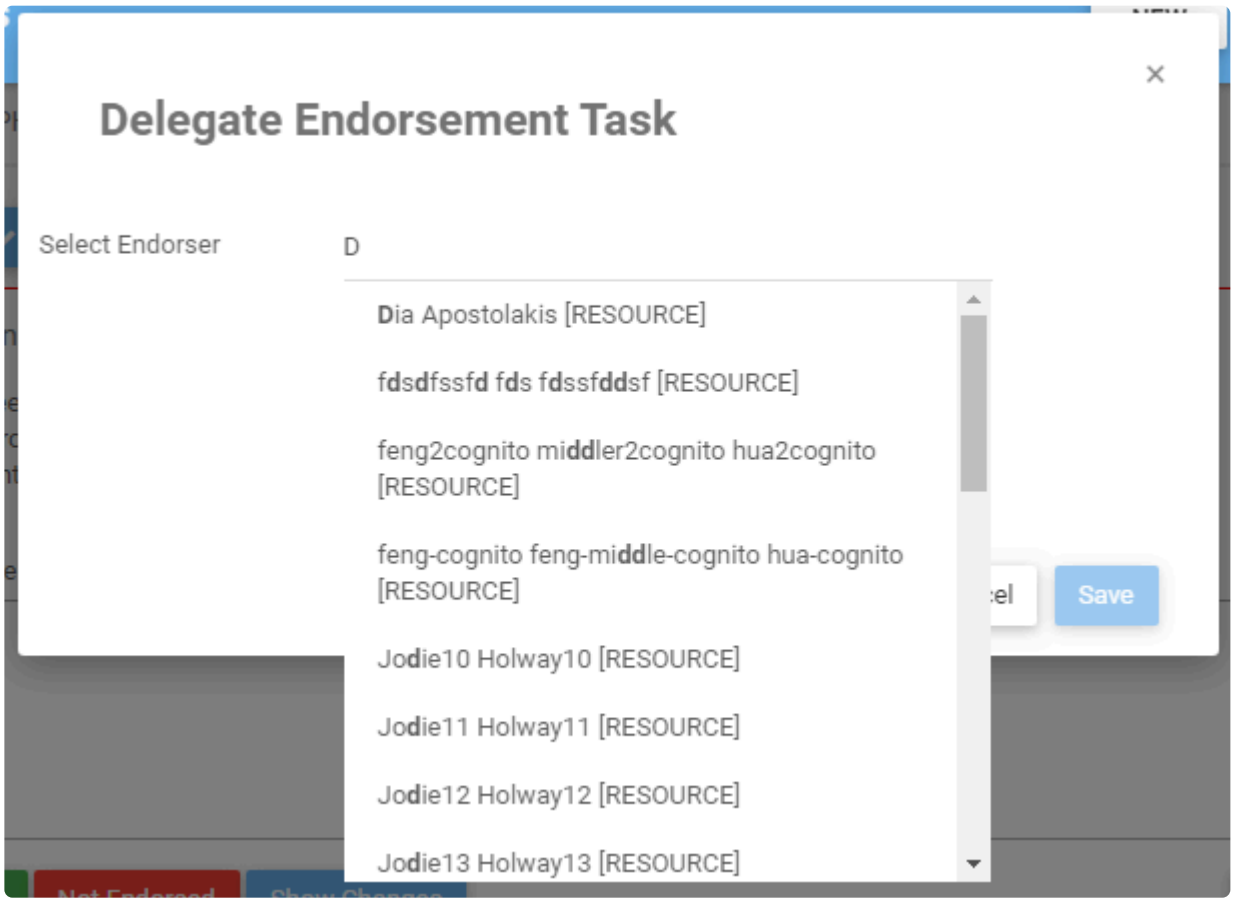
7.3.5 Delegating Endorsement

The delegate feature in endorsement cycle allows the user to reassign their task for the current cycle. Using the “Delegate” feature, the endorser can choose another resource to delegate their task for that cycle.
If a new endorsement cycle begins, the orginal endorser will revert back to being the endorser and the delegated endorser will be removed from the list.

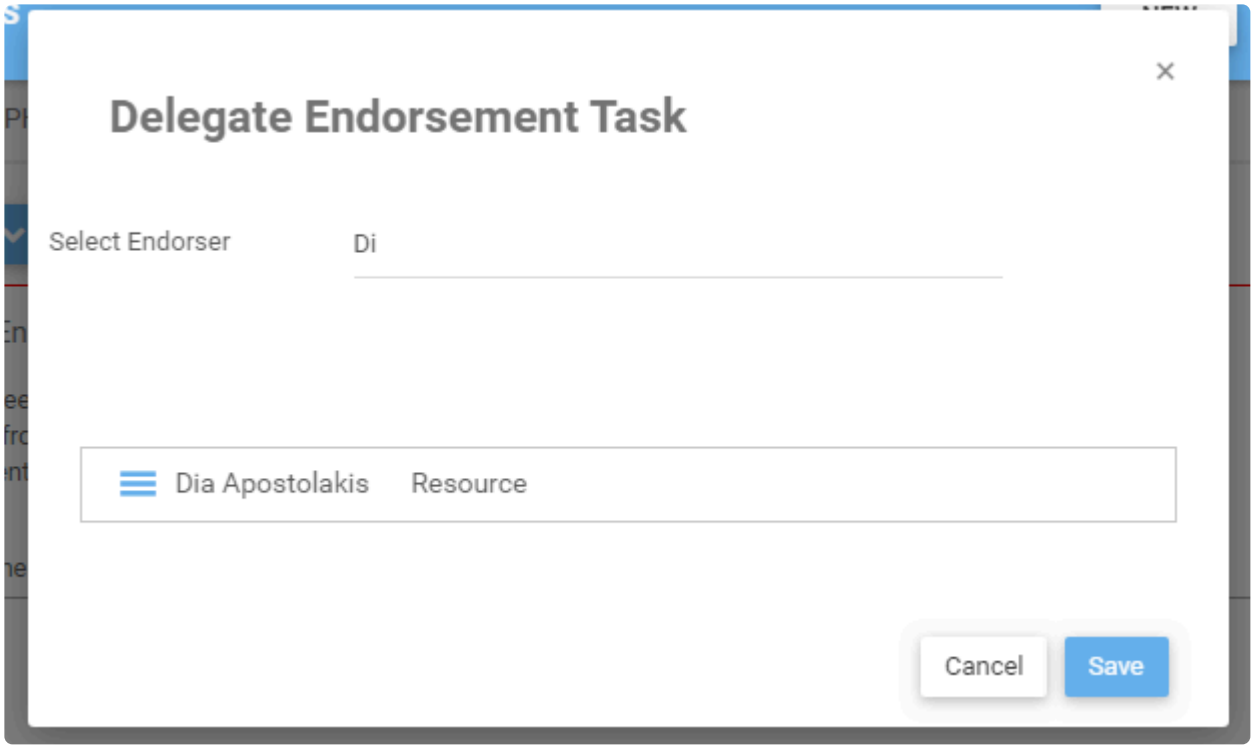
> Note: That this change will only affect the current cycle and you will revert to being the endorser for the next cycle.

1. Click on the Delegate button

2. Search the resource you want to delegate to



3. Select the resource you want to delegate to



4. After you click

the delegated resource will become an endorser for this object.

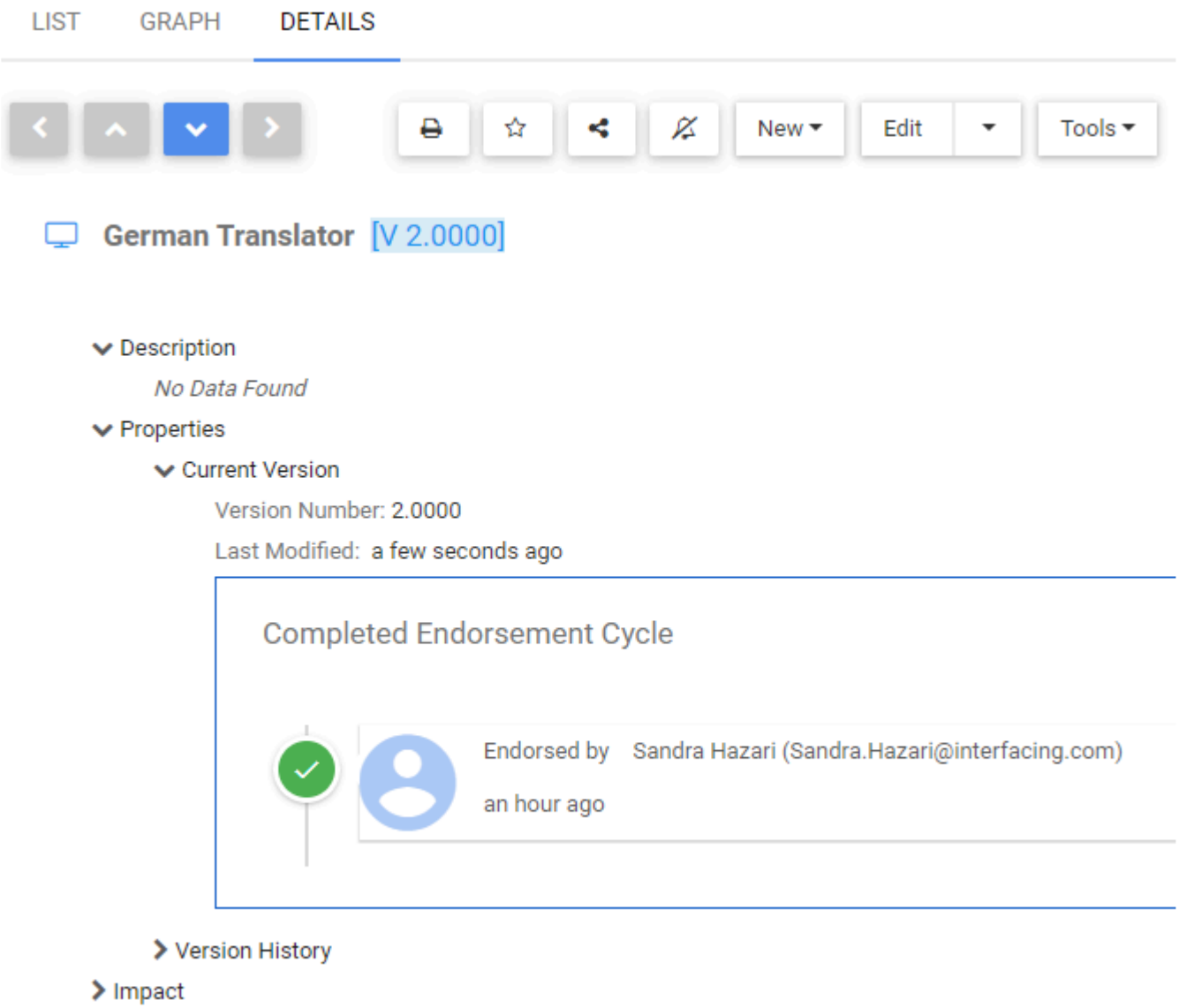
Rules:

- An endorser cannot delegate a resource which was deleted or disabled
- An endorser cannot delegate to a resource that's already in the endorsement cycle
- An endorser selects a new resource to replace them for the endorsement cycle, then the new delegated resource is reassigned for that instance only
- A endorser cannot delegated to a new resource after they have already voted
- The previous endorser will not be receiving emails and notification after the user delegated their task to the new resource
- Given that I am an endorser and I am on the Delegate Endorsement Task window, if I didn't select any resource, then the option for saving is disabled
- Given that I am an endorser, when I selected an endorser and then I hit the cancel button, a window should prompt asking if I choose to cancel
- Given that I am an endorser with displayed content on publish, when I delegate an object, I can only select my resources according to my displayed content profile
- Given that i am an endorser with displayed content on show latest, when i delegate an object, i can only select my resources according to my displayed content profile

7.3.6 Endorsement History

Endorsement Cycle

When an endorsement cycle has been completed, an “Completed Endorsement Cycle” box will be displayed in the Details page, under the Properties section, under the Current version. This box will display the list of endorsers, and will show that they all endorsed objects.

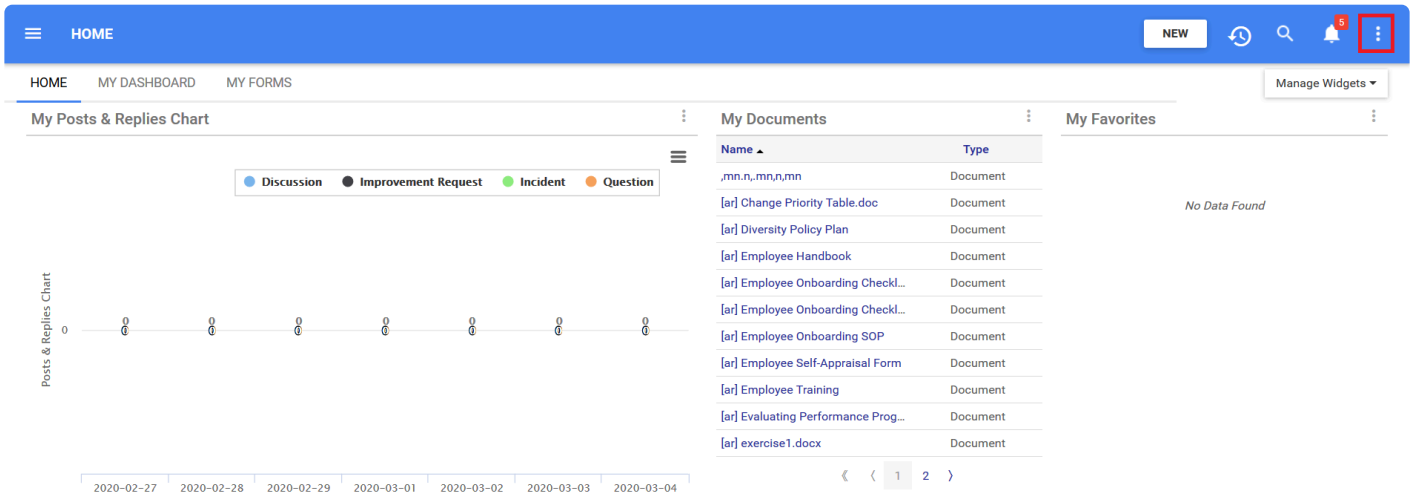


8.0 My Profile

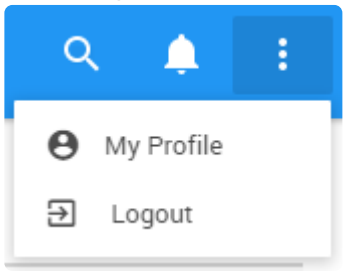
The My Profile section is where you can manage all settings related specifically to your user. It provides a central page where users can see information about their profile, as well as customizes certain sections of the EPC.

Navigate to the My Profile Page:

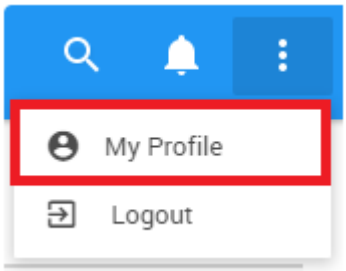
1. Select the button at the top right corner of the page



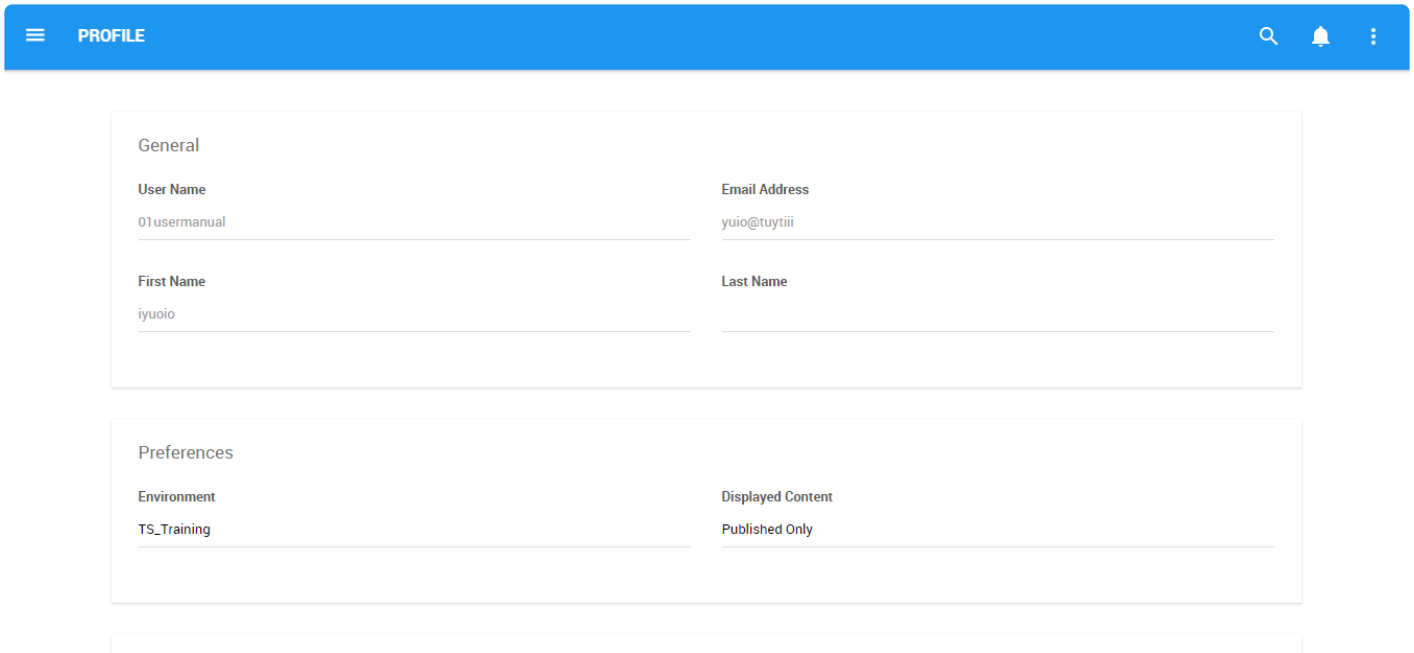
2. It will generate a drop-down menu



3. Click on the “My Profile” button

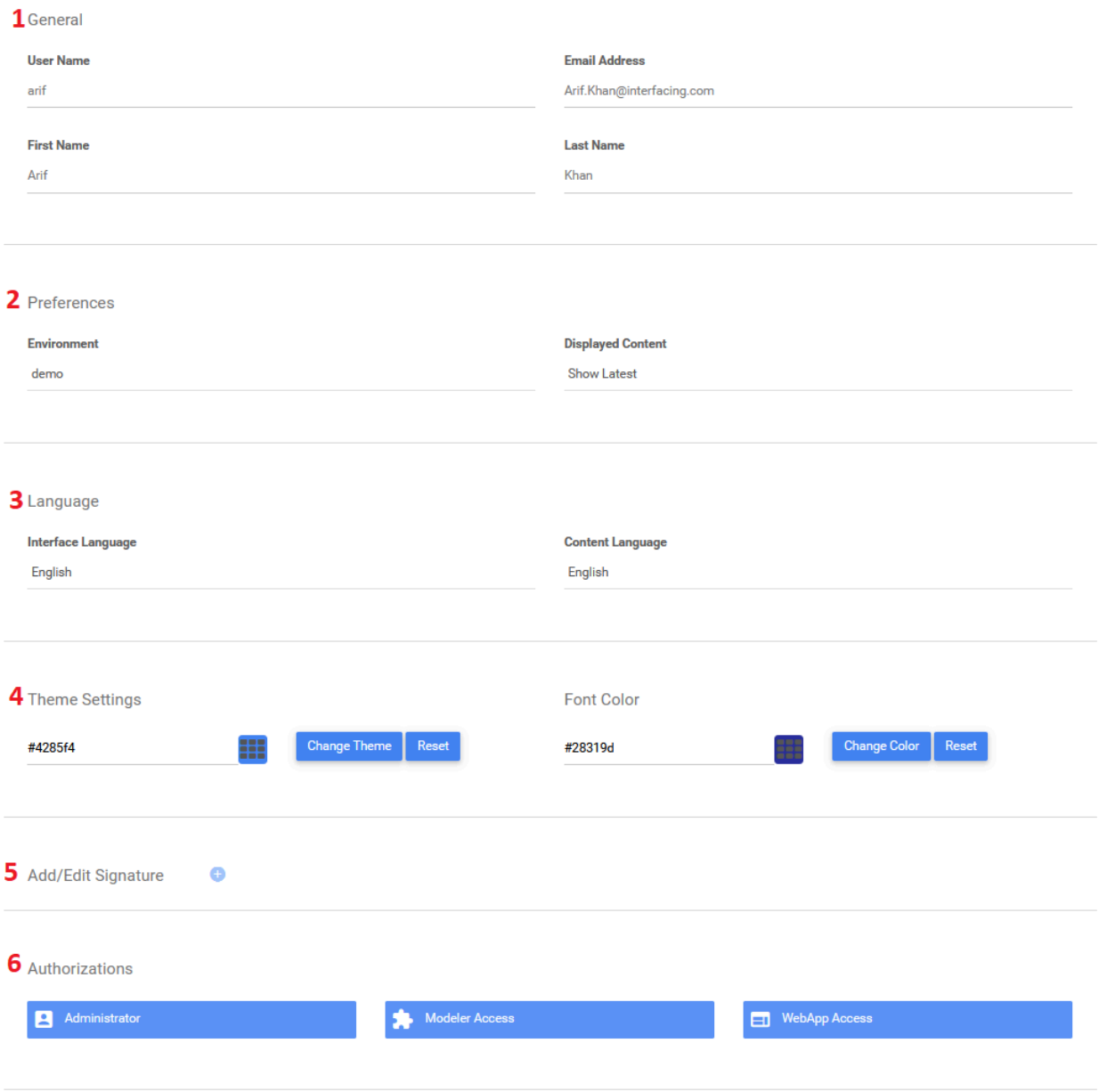


4. You will be prompted to your profile page



The My Profile section features 5 major components

1. General
2. Preferences
3. Language
4. Theme Setting
5. Add/Signature
6. Authorization


1 General
User Name
arif
Email Address
Arif.Khan@interfacing.com
First Name
Arif
Last Name
Khan
2 Preferences
Environment
demo
Displayed Content
Show Latest
3 Language
Interface Language
English
Content Language
English
4 Theme Settings
#4285f4
Change Theme
Reset
Font Color
#28319d
Change Color
Reset
5 Add/Edit Signature
6 Authorizations
Administrator
Modeler Access
WebApp 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 Profile Picture
b) User Name
c) Email Address
d) First Name
e) Last Name

8.1.1 User Profile Picture

Users can upload and edit their user profile picture directly on the WebApp. Adding a profile picture will allow users to have a more customized profile

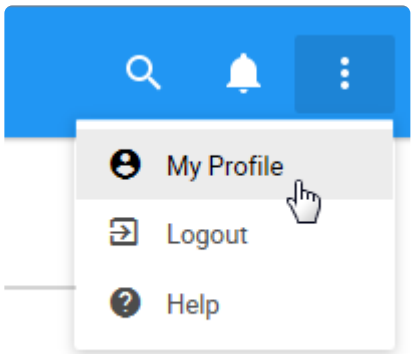
Users can do the following:

1. Add User Profile Picture
2. Edit User Profile Picture
3. Remove User Profile Picture

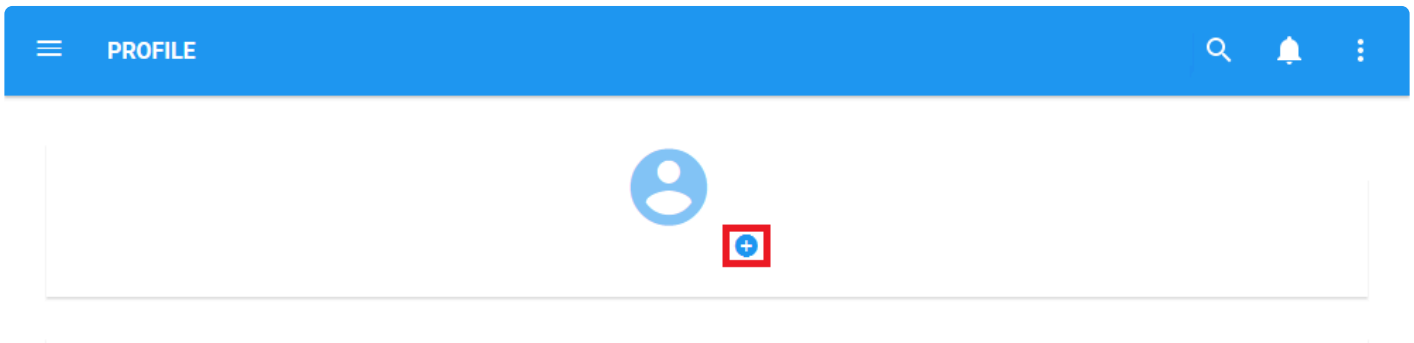
8.1.1.1 Add User Profile Picture

To add a profile picture to your user, please follow the next steps:

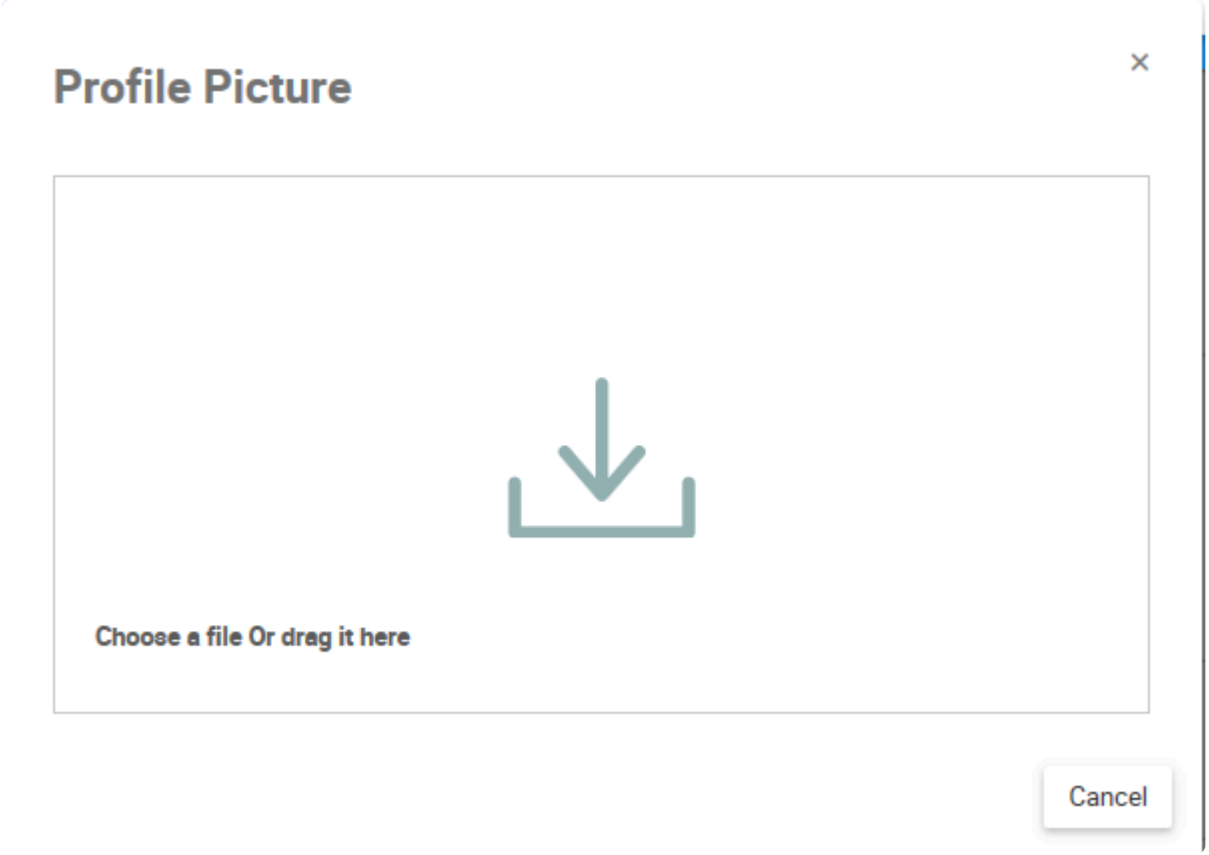
1. Navigate to “My Profile” section on the EPC WebApp



2. Click on the button

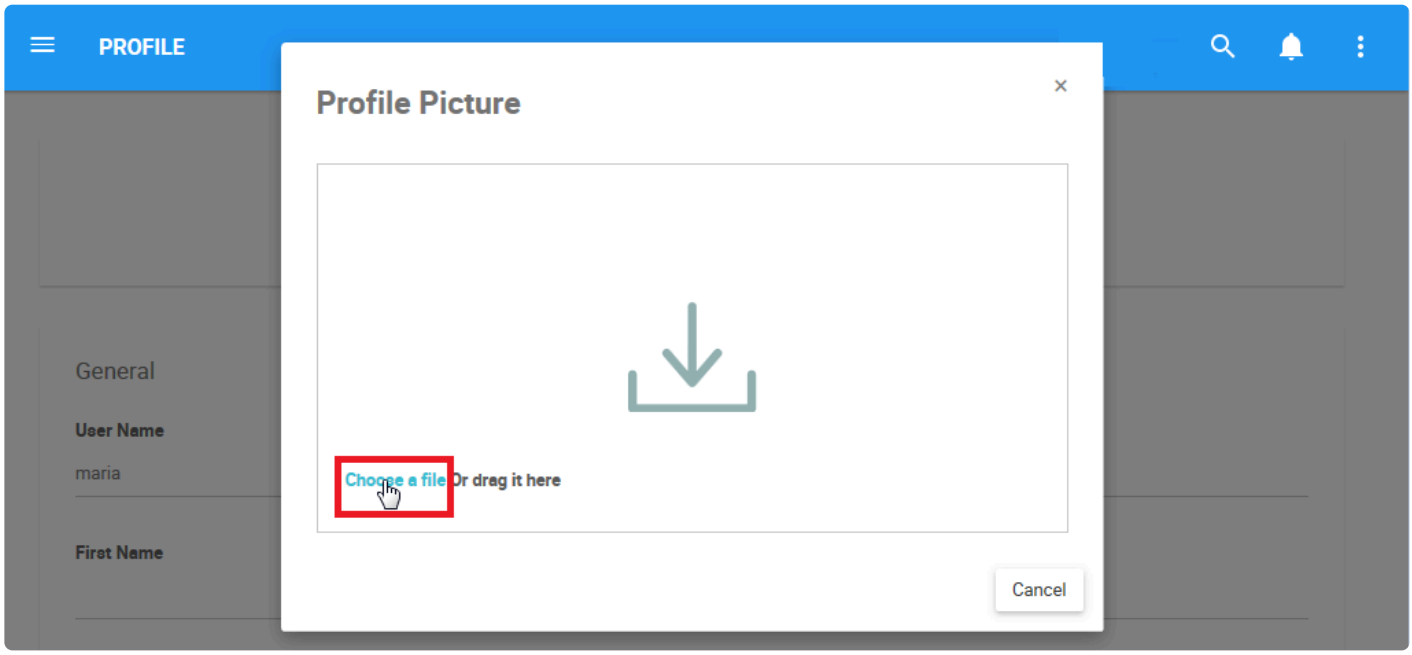


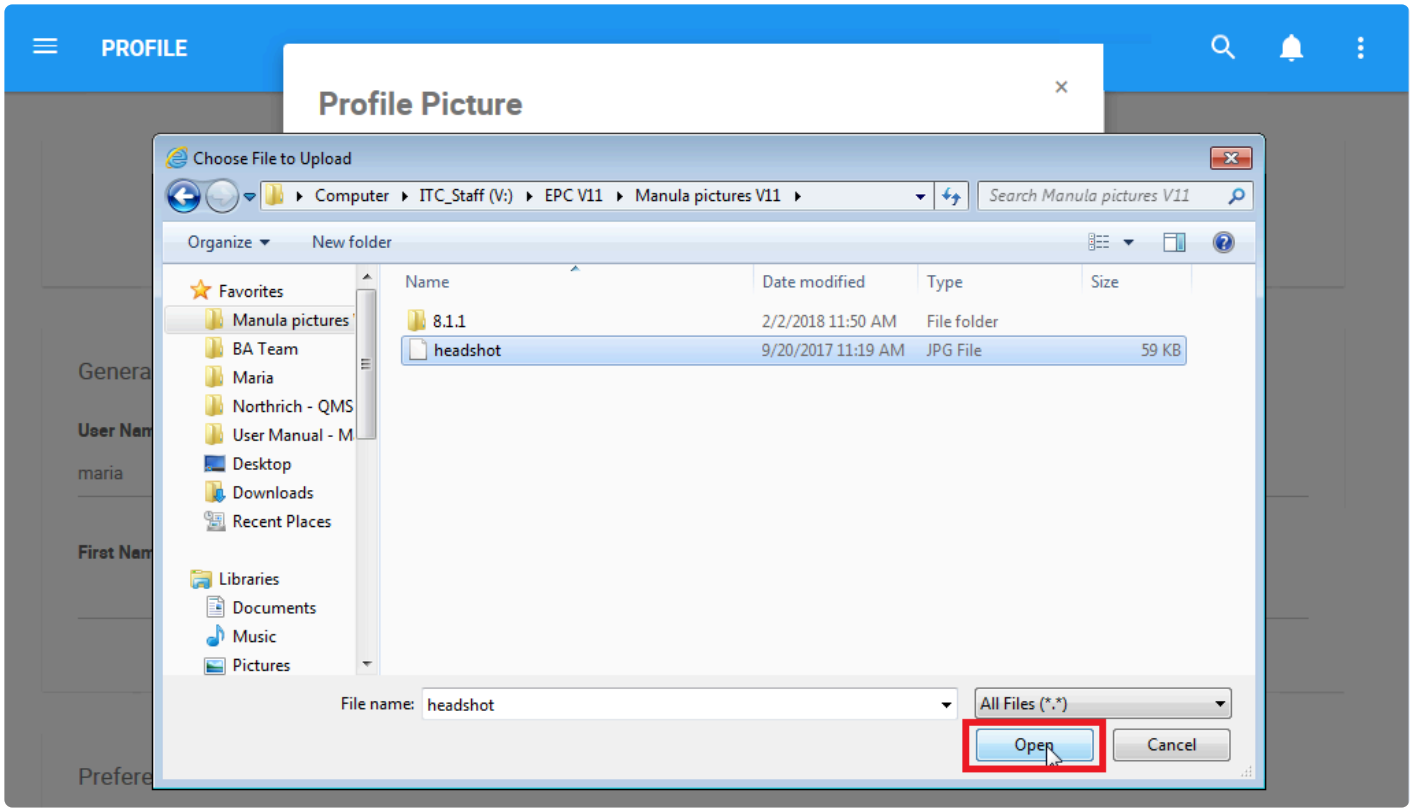
3. The following pop-up window will appear



4. To upload a picture, users can “Choose a file” or “Drag a file”

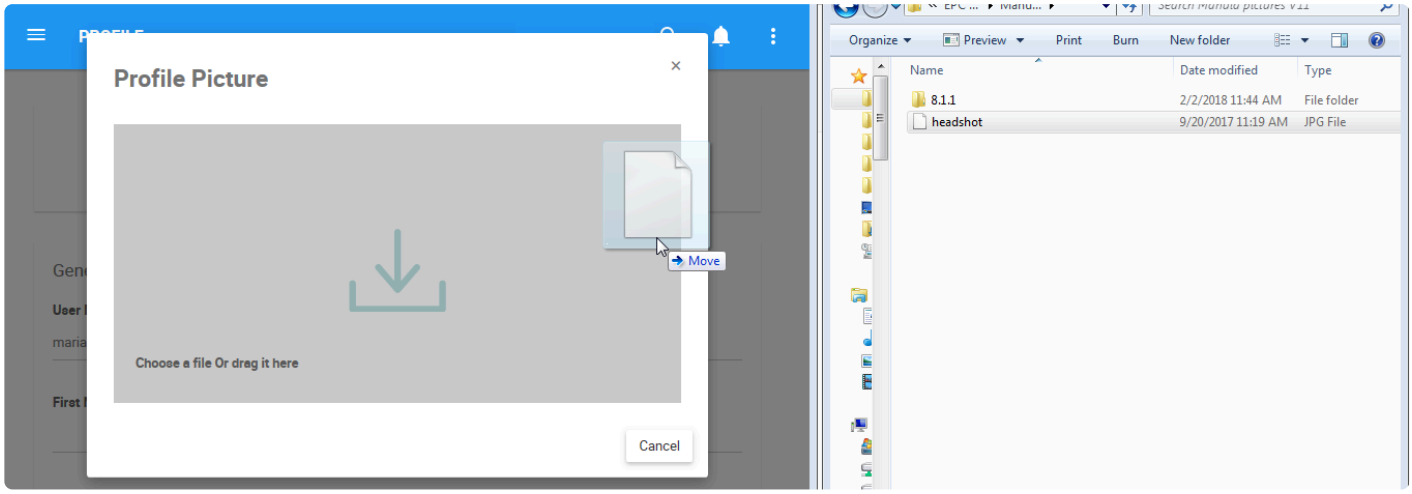
i) To choose a file click on “Choose a file.” Locate the picture you wish to upload and click on “Open”





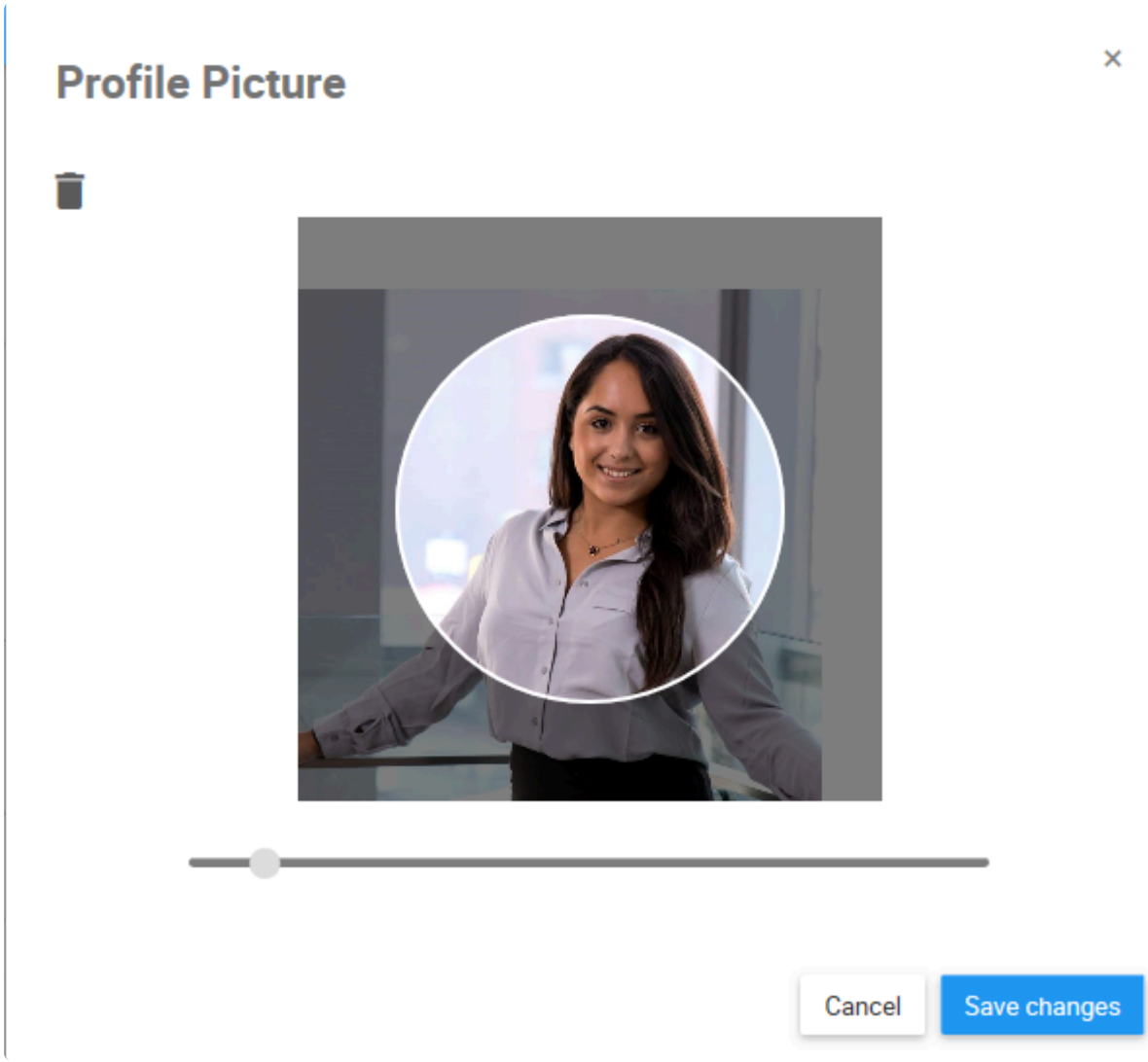
ii) To drag and drop the file, open the folder where the file is located and drag the file to the

box



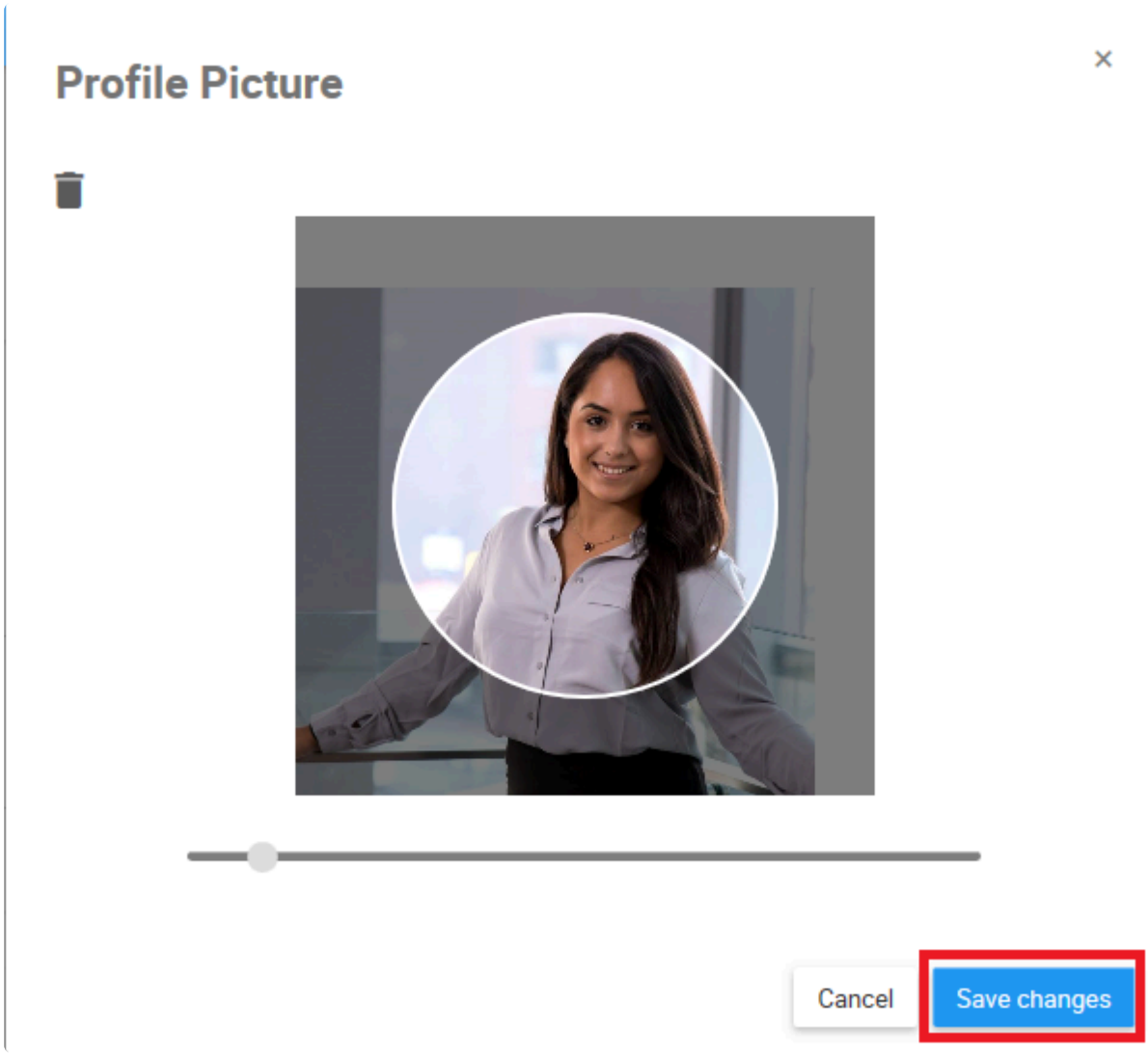
The maximum picture size is 10 Mbs

5. The user profile picture will pop-up on the window

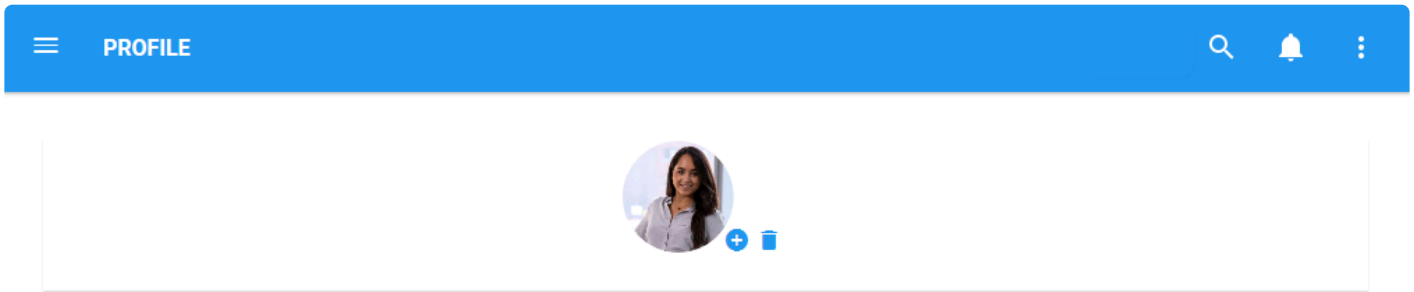


Only what is inside the circular window will be part of the profile picture

6. Click on Save changes to save the new profile picture



7. The new profile picture will appear on top of the “My Profile” page

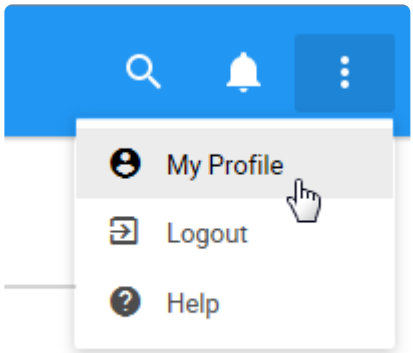


8.1.1.2 Edit User Profile Picture

After a user added his profile picture, he can edit his profile picture to find the best fit inside the circular window.

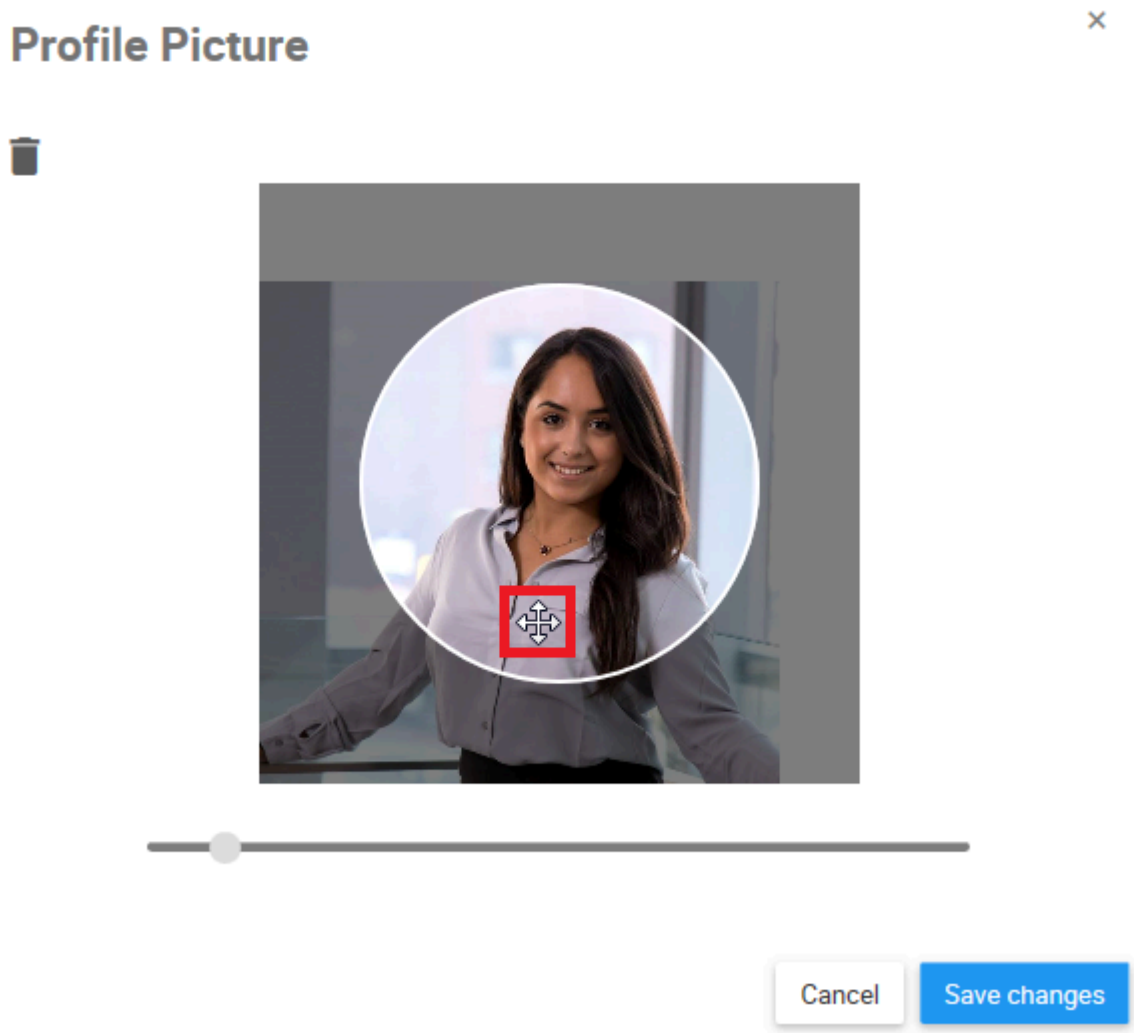
To edit profile picture, please follow the next steps:

1. Navigate to the “My Profile” section on the EPC WebApp



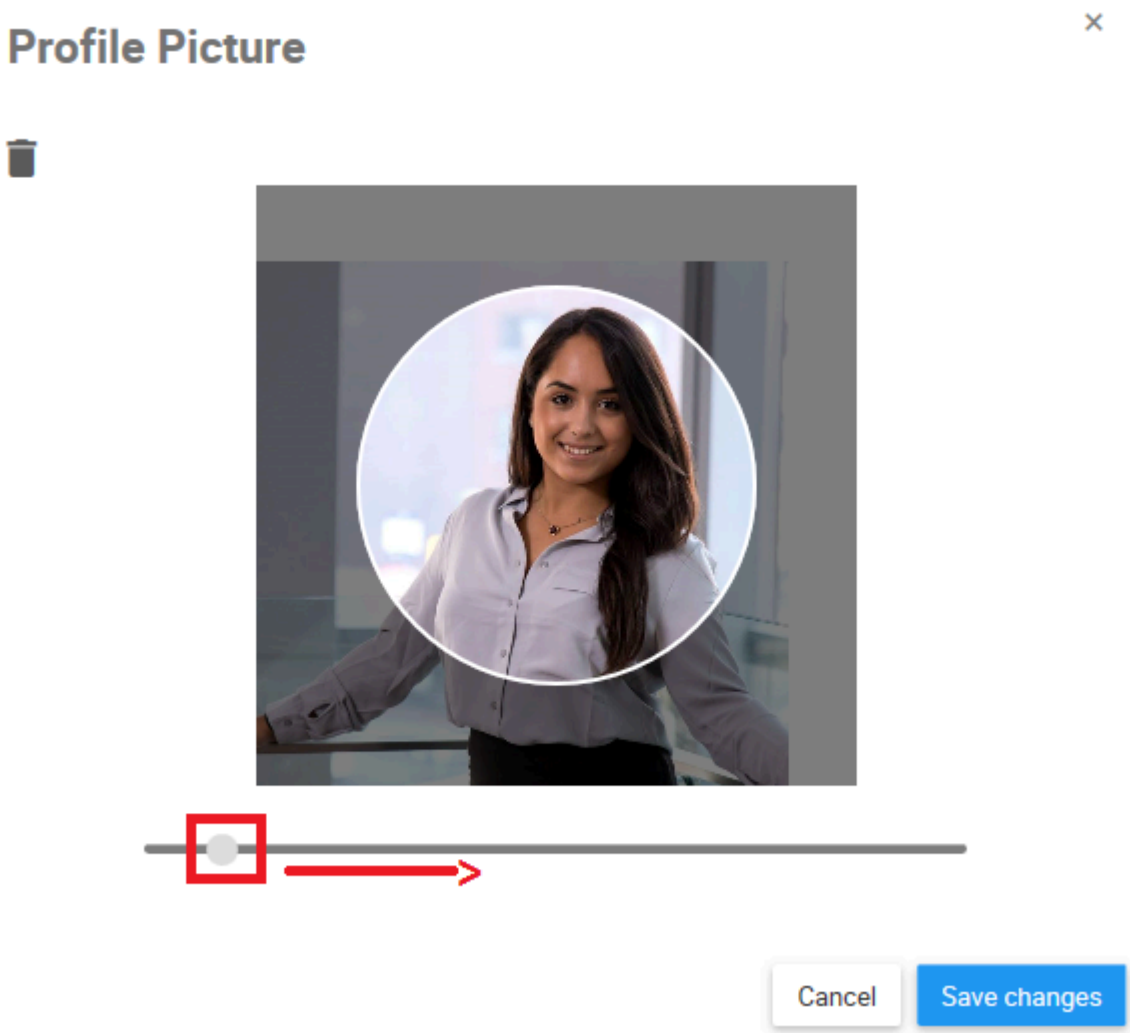
2. Follow the steps to Add User Profile Picture

3. Once the picture is added, users can move around the picture using the button

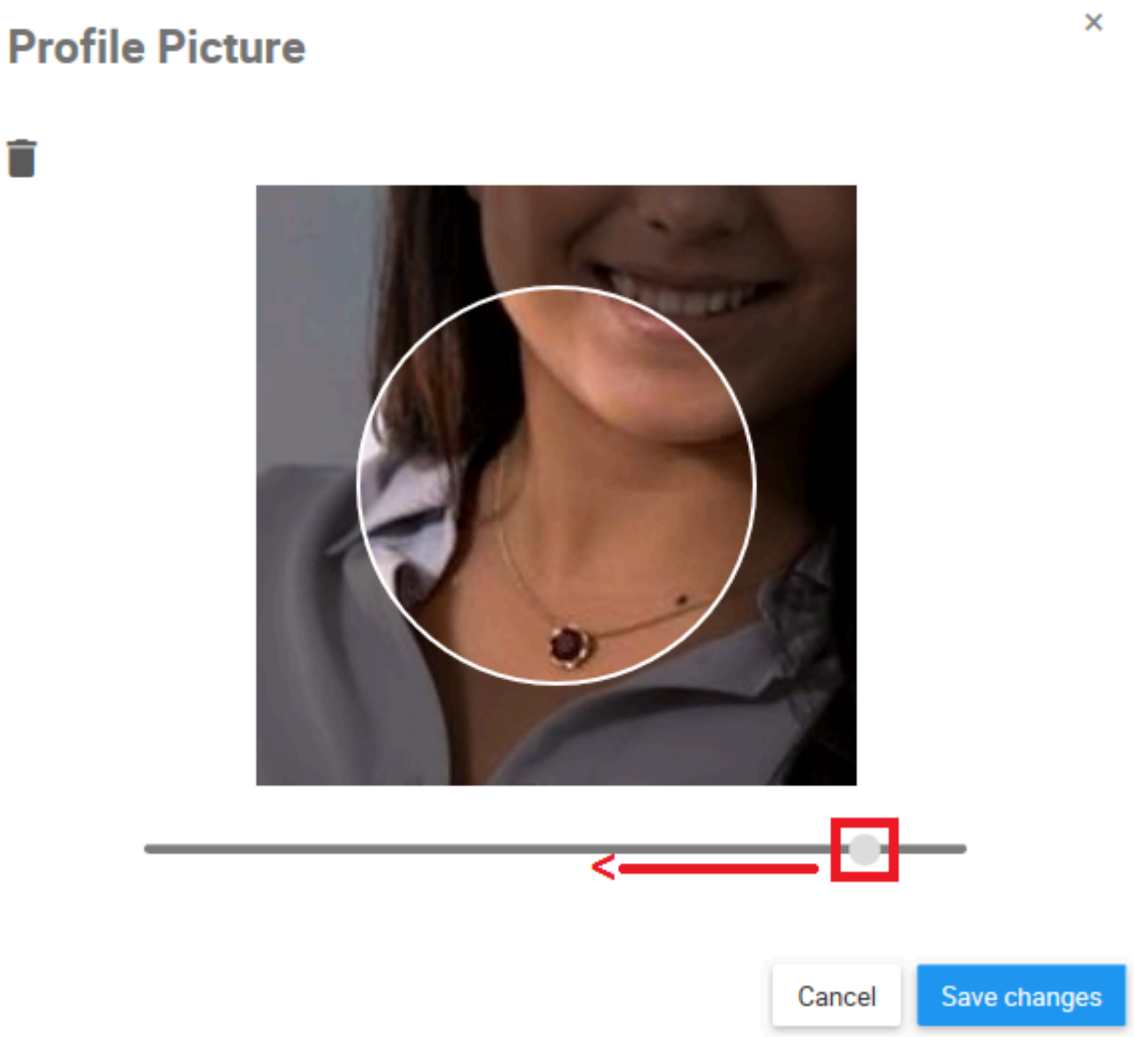


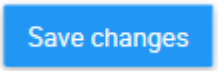
Only what is inside the circular window will be part of the profile picture

4. To zoom in the picture, click on the button and drag it to the right

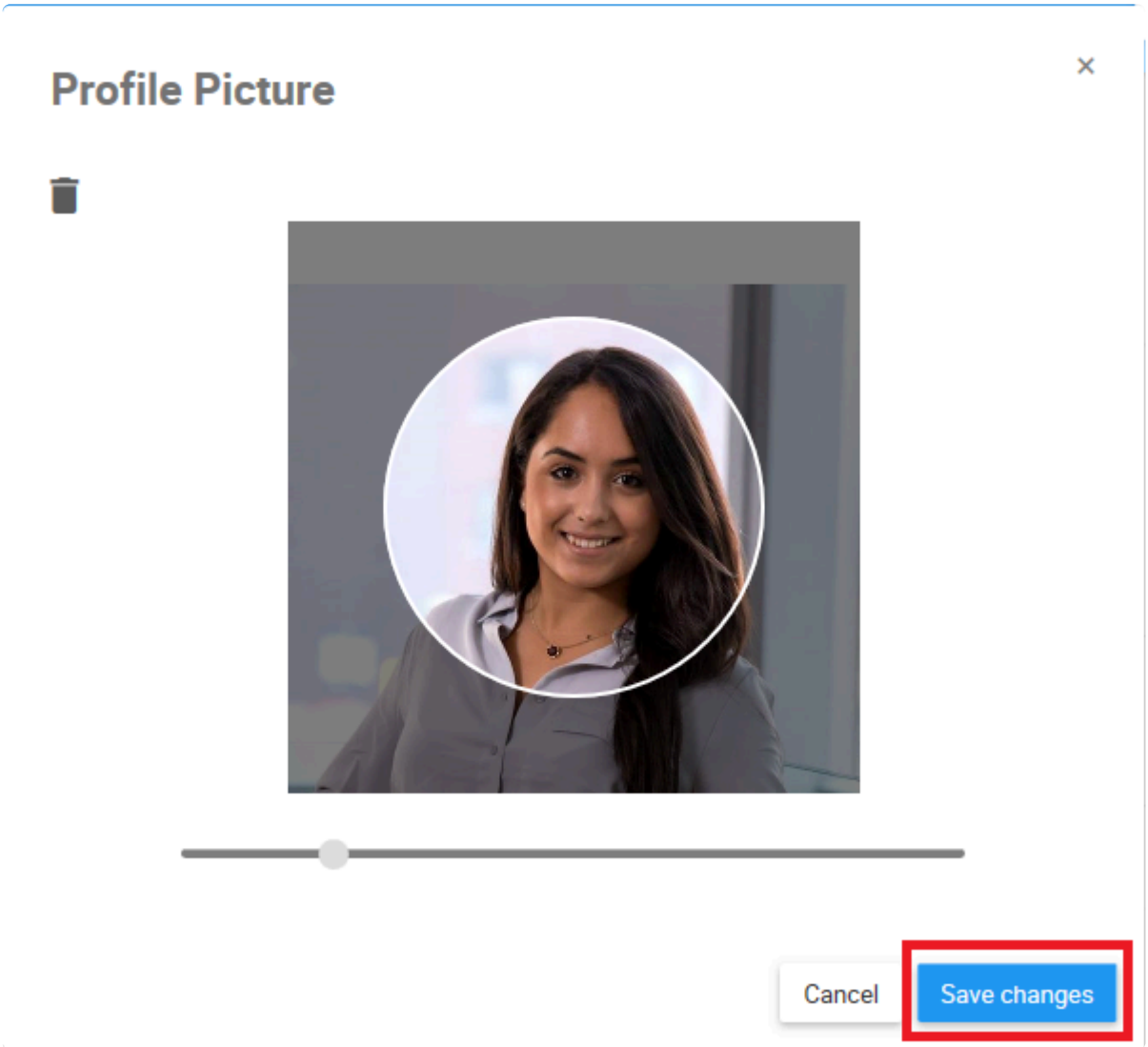


5. To zoom out the picture, click on the button and drag it to the left



6. Once you finish editing, click on the 

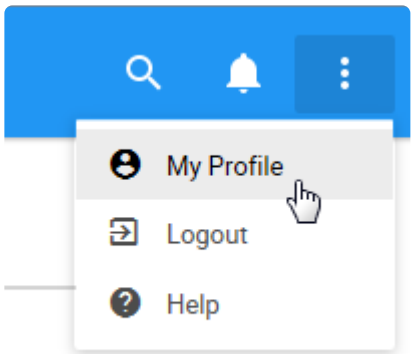
button to save changes


Profile Picture
Cancel
Save changes

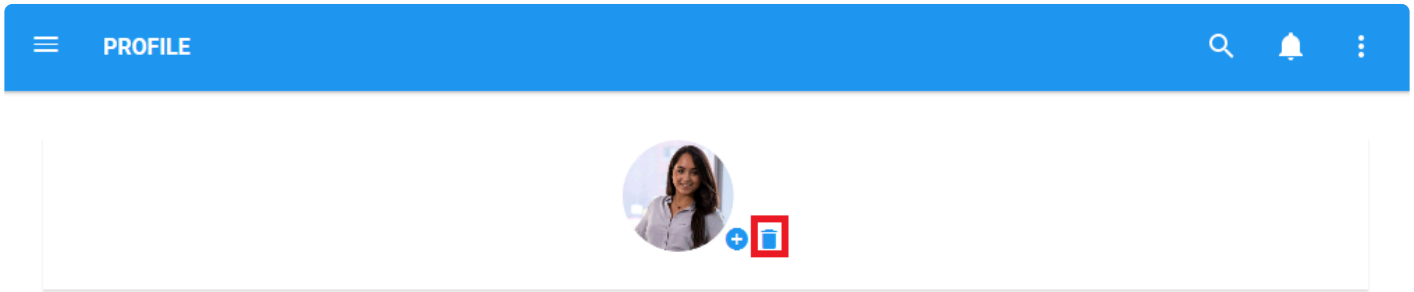
8.1.1.3 Remove User Profile Picture

To remove user profile picture, please follow the next steps:

1. Navigate to the “My Profile” section on the EPC WebApp



2. Click on the button to remove the profile picture



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

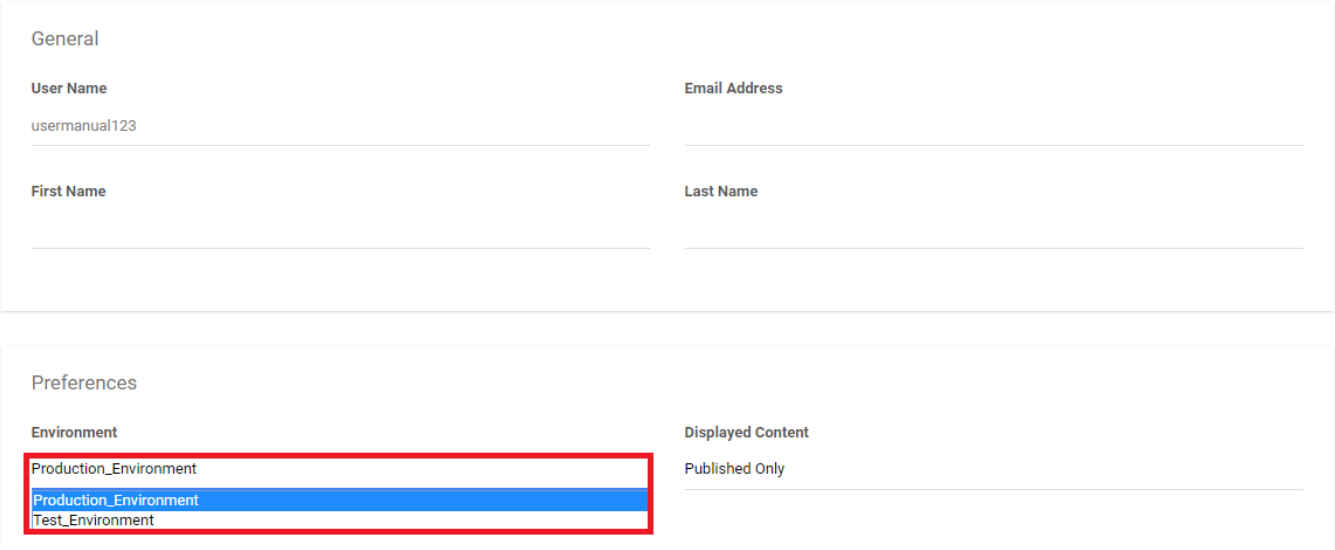
Users, when interacting with the EPC Web App, interact in 1 specific environment at a time. System Administrators control environment access and select which environments users have access to. Users can switch between different environments within the “My Profile” section of the EPC.

To toggle between environments, see the instructions below:

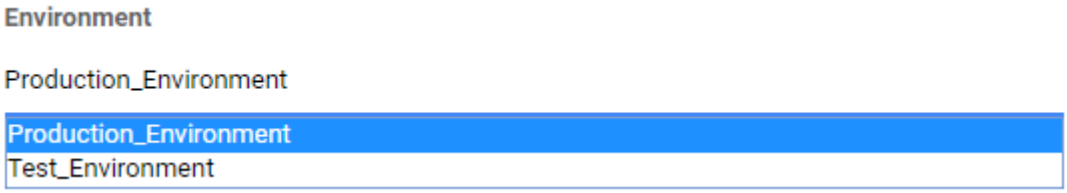
1. Navigate to the “My Profile” section of the EPC

2. Scroll down to the Environment section

3. Select the Environment text box



4. It will generate a drop-down menu featuring all the environments that you have been given access to.



5. Select the environment you wish to work in. The page will be refreshed and you will now be navigating this environment

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.

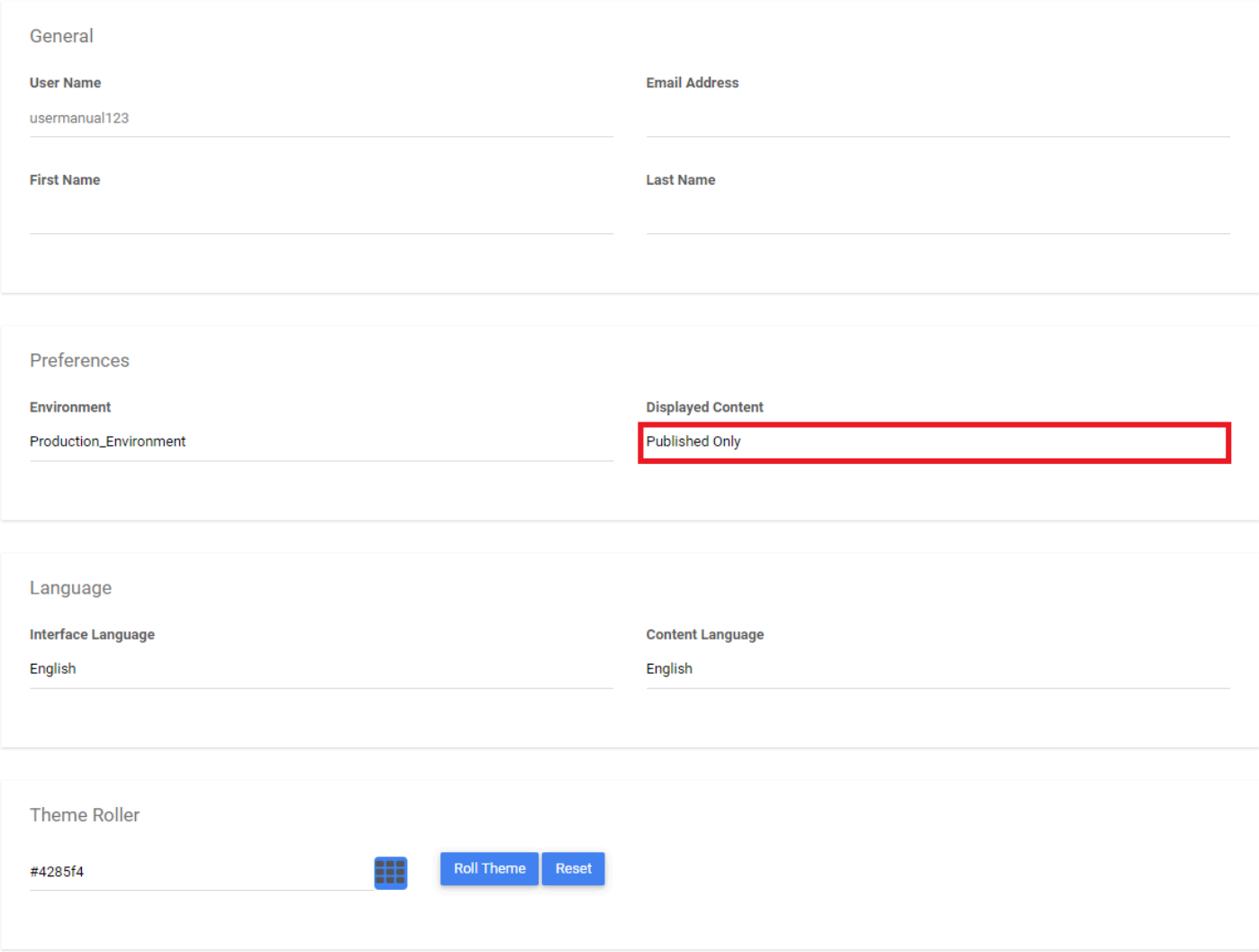
To use this function, please see the steps below:

Via My Profile page

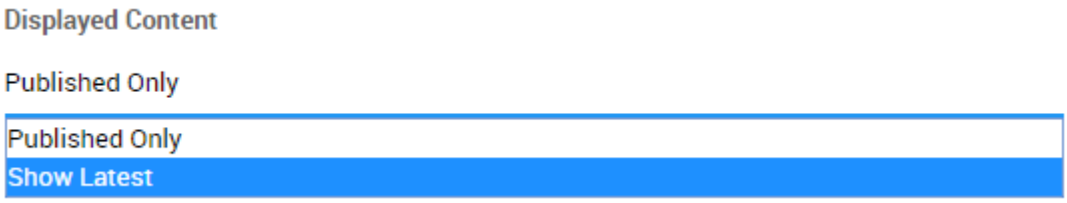
1. Navigate to the “My Profile” section of the EPC

2. Scroll down to the Displayed Content section

3. Select the Displayed Content text box



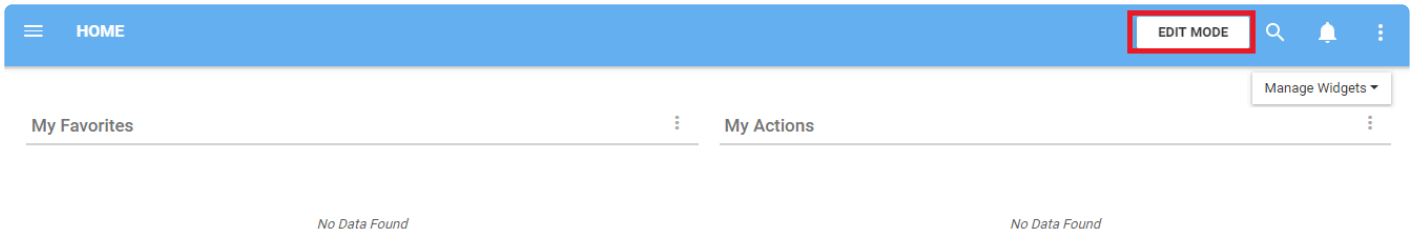
4. It will generate a drop-down menu featuring all the content settings that you have been given access to.



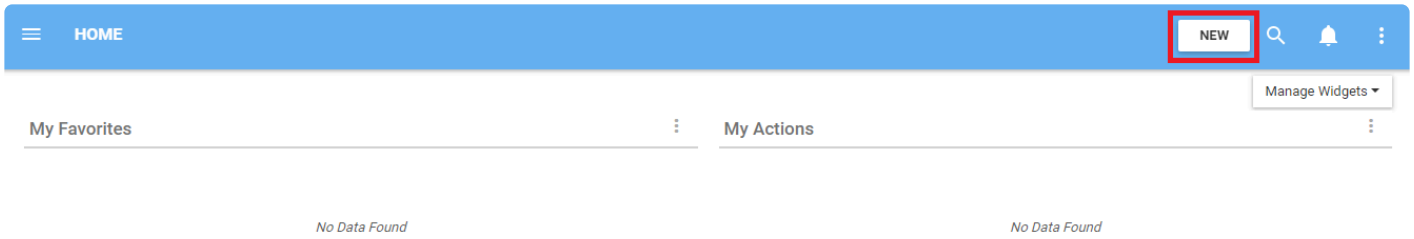
5. Select the content setting you wish to navigate. The page will be refreshed and you will now be navigating this content setting.

Via the Edit Mode button

When you have the appropriate access right to be able to edit in EPC, if you are not in the Show Latest display, you will be able to see an “Edit Mode” button, like shown below.



Click on the “Edit Mode” button. By doing so, it will switch to Show Latest the displayed content, and you will be able to see the “New” button.



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.

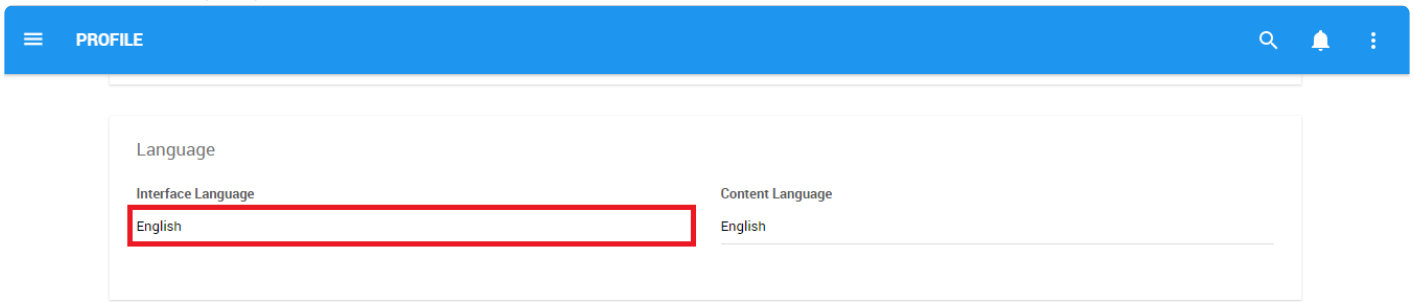
The EPC data must be translated into the selected language in order for it them to appear in that language in the Web App. **Note that this requires a Multi-lingual EPC license**.

To toggle between languages, please see the steps below:

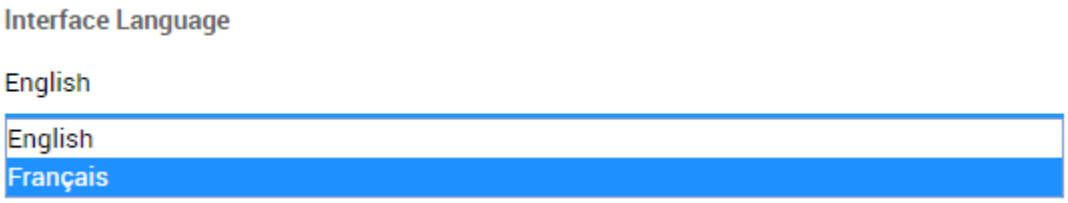
1. Navigate to the “My Profile” section of the EPC

2. Scroll down to Language section

3. Select a Language text box



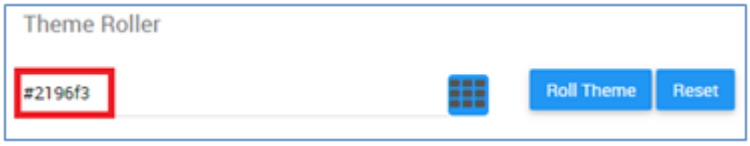
4. It will generate a drop-down menu featuring all the languages that you have been given access to.



5. Select the language you wish to display. The page will be refreshed and you will now be navigating the selected language.

8.4 Theme Color Setting

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

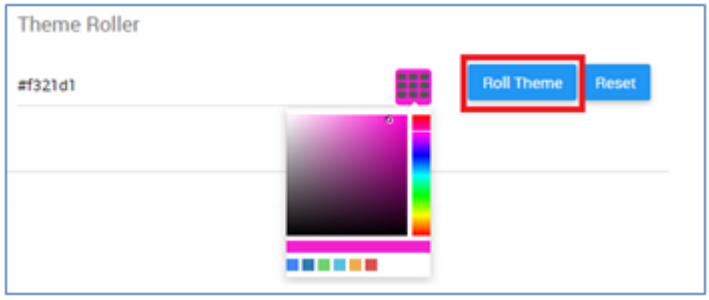
a.

b.

c.

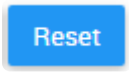
6. Select to color you desire. It will enter a new alphanumeric code in the text box.

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

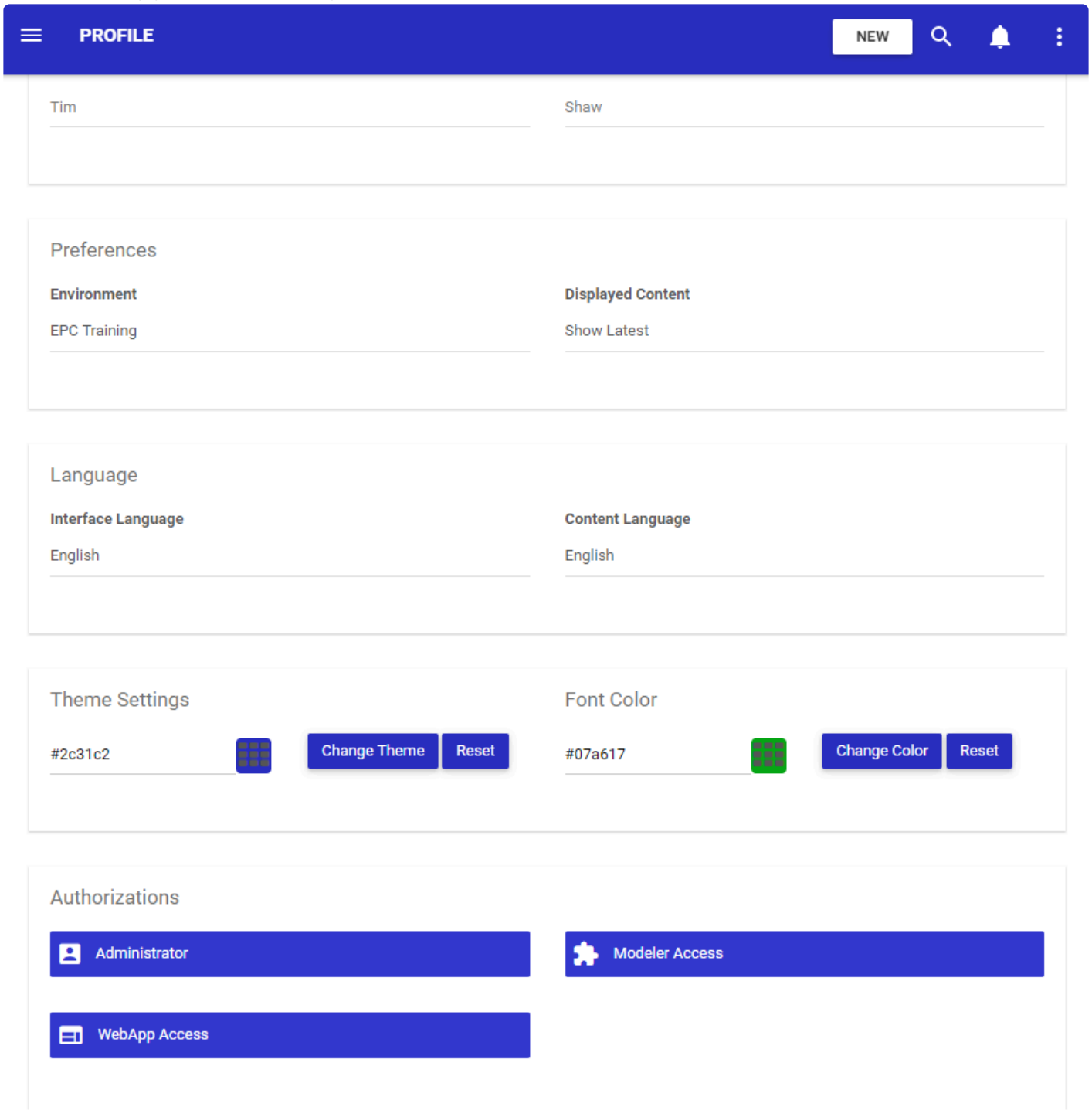
Access is reflected by the color in which the boxes are highlighted. If a section is highlighted in BLUE, it represents access has been granted, and GREY representing access restricted. Please see the examples below for further details.

Example 1: This user has access to the EPC Web App and the EPC Modeler but is not an administrator.

Example 2: This user has access to the EPC Web App and the EPC Modeler, and is an Administrator.

8.6 Default Font Color

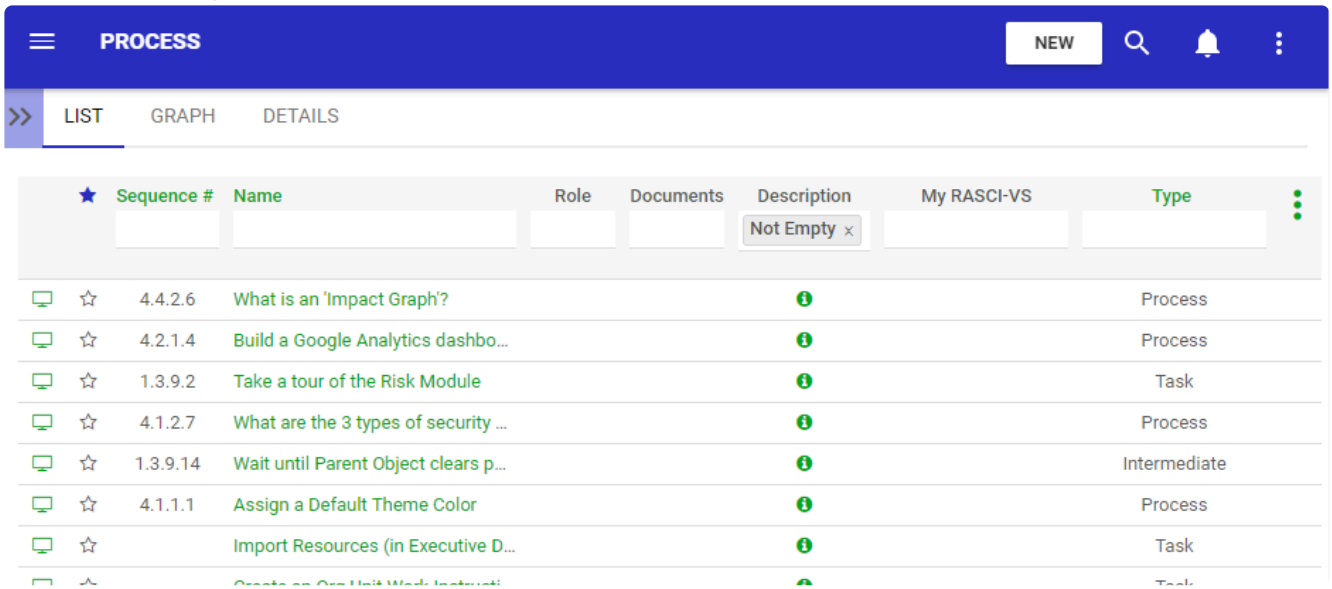
Within your profile page, you can now customize the default hyperlink font color for user profile across the application. Along with the theme color selection, you can use a similar image selector to define hyperlink color, allowing you to customize your profile.



Selecting a new font color will allow you to change hyperlinks available on:

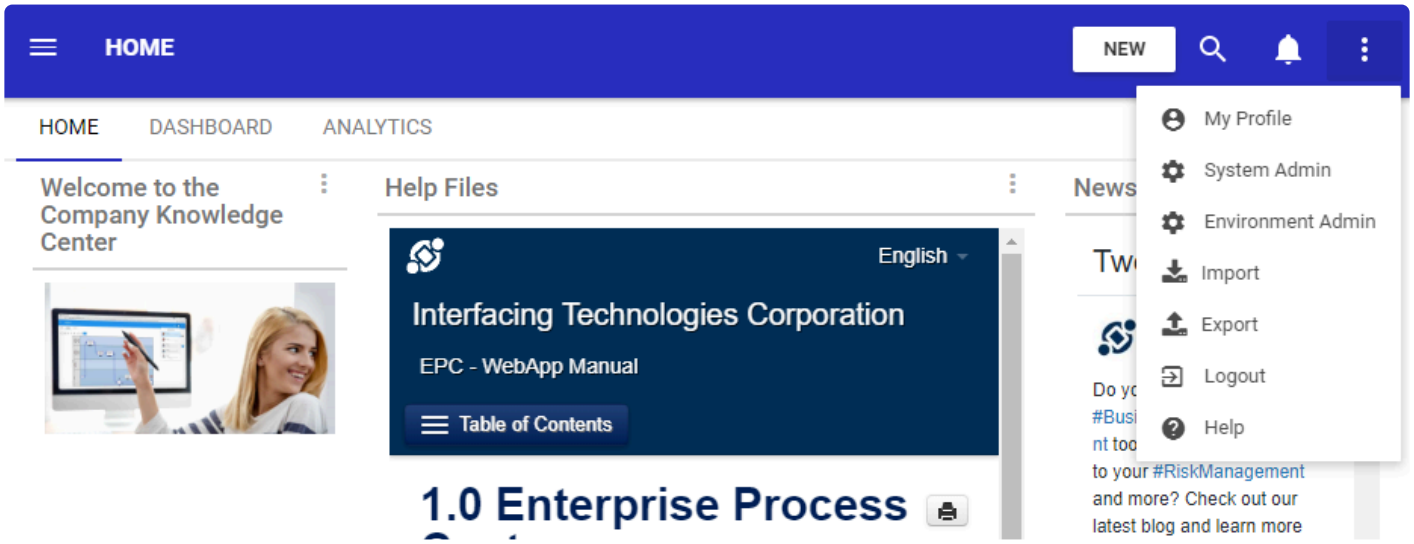
- You Home Page

- Your List Views
- Your Details Page

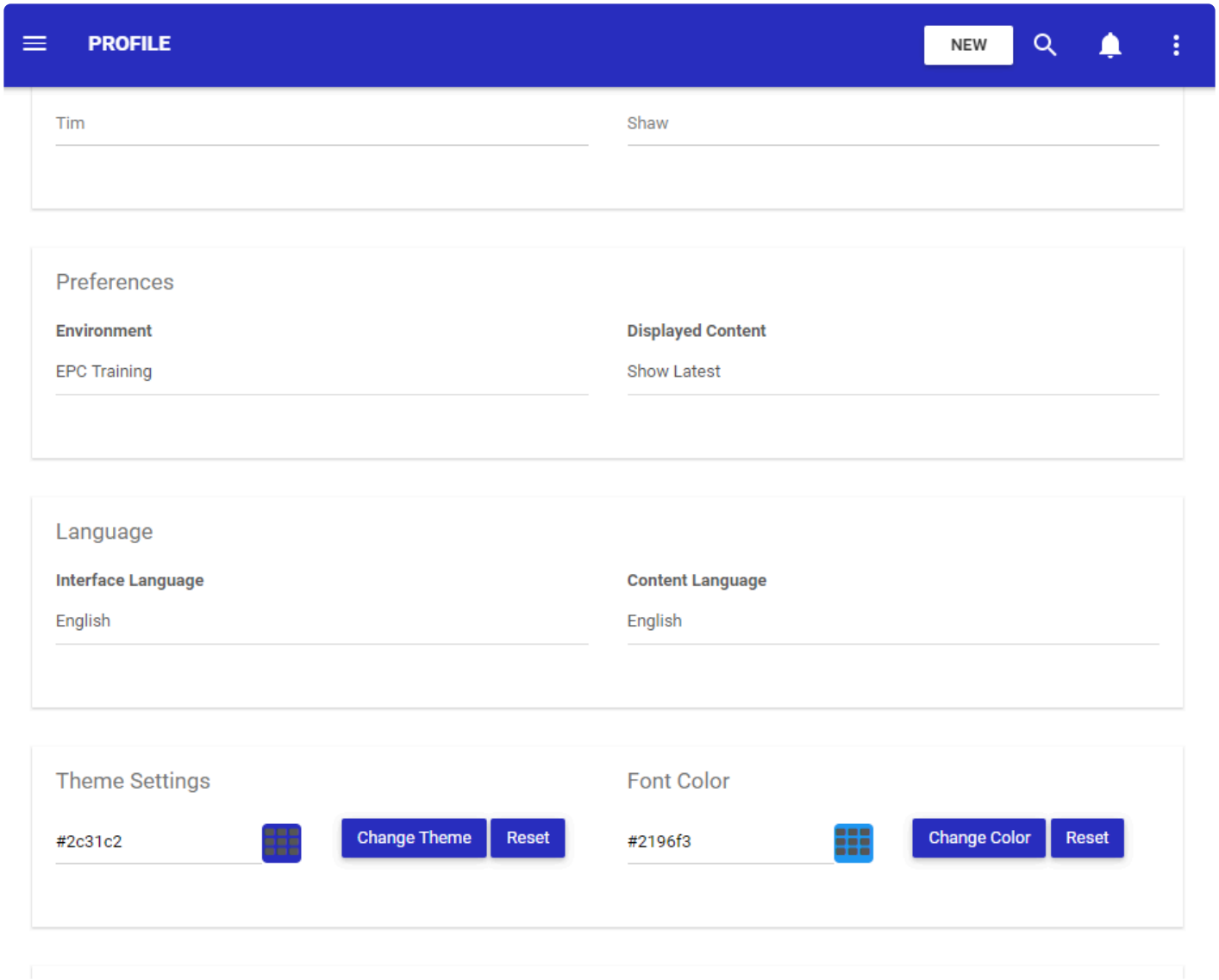


To change your default font color:

1) Navigate to your Profile Page

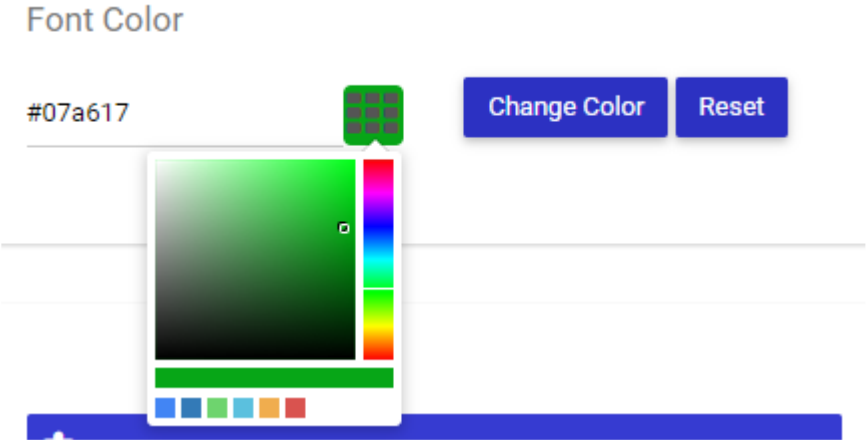


2) Scroll down to find the ‘Font Color’ section



3) To change the color

a) Type in your desire color code b) click on the color selector



4) Once you have selected the color, click on the ‘Change Font’ button

Change Color

Revert to default

If for any reason you want to revert to the default font color defined by your administrators, simply click on the ‘Reset’ button and your font color will be reset.

Reset

8.7 Signature

User can upload and edit their signature directly on the WebApp.

A signature is used to identify the person who is a responsible to the contract and to show that the signing party has read the contents of the document, understands the contents, and consents to the stipulations of the contract.

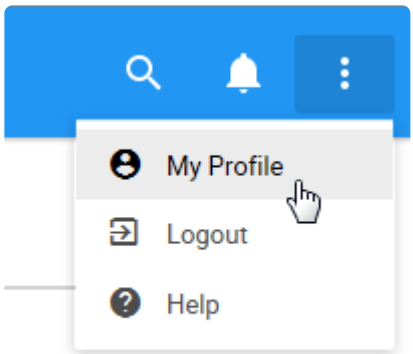
User can do the following:

1. Add a Signature
2. Remove a Signature

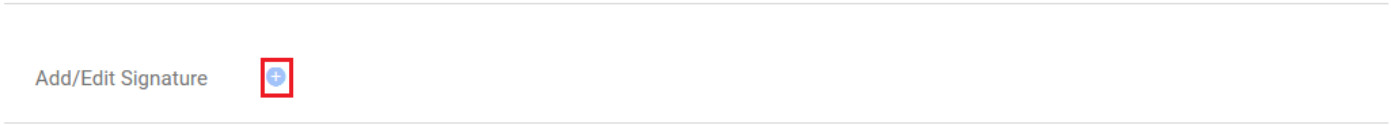
8.7.1 Add Signature

To add a profile picture to your user, please follow the next steps:

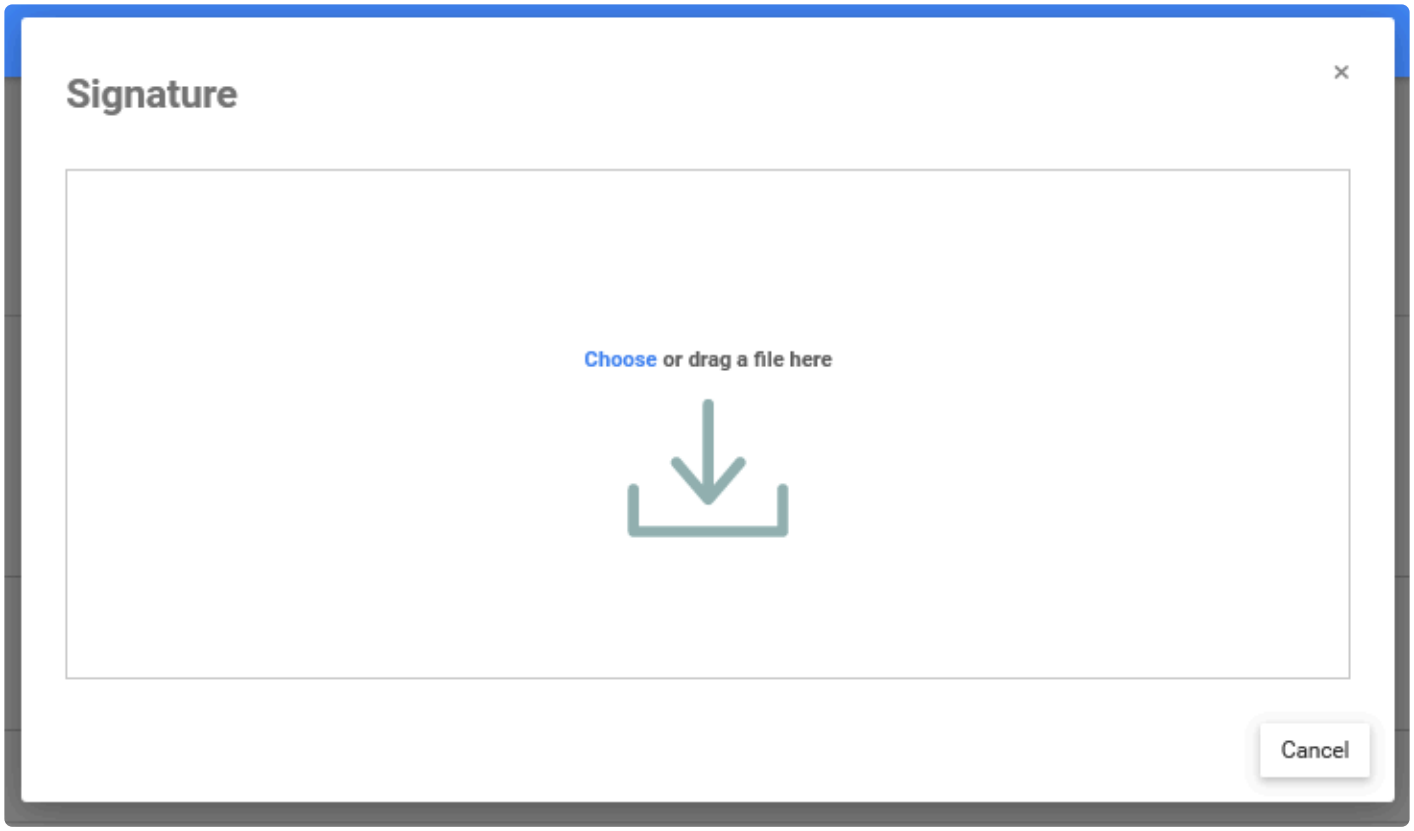
1. Navigate to “My Profile” section on the EPC WebApp



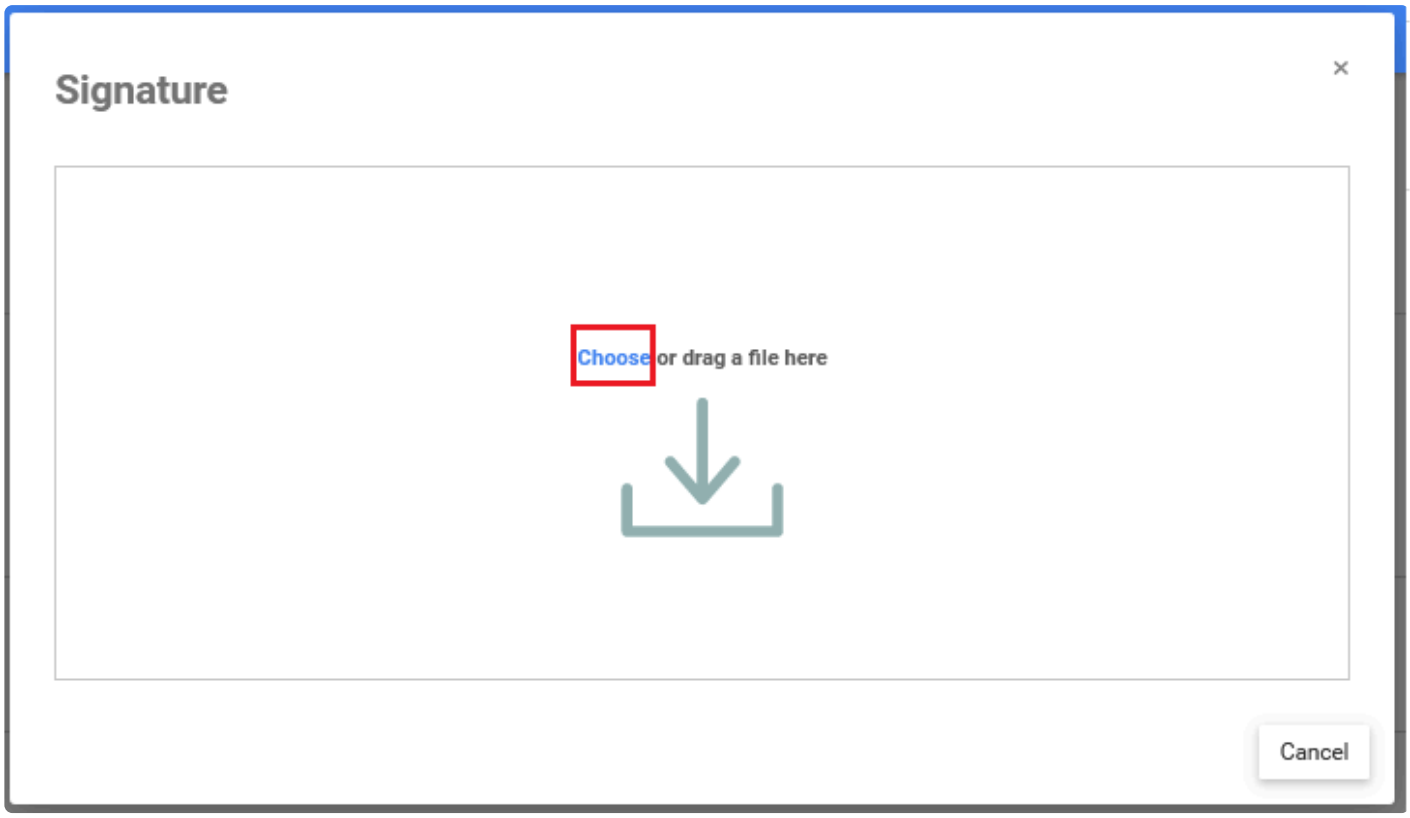
2. Click on the button



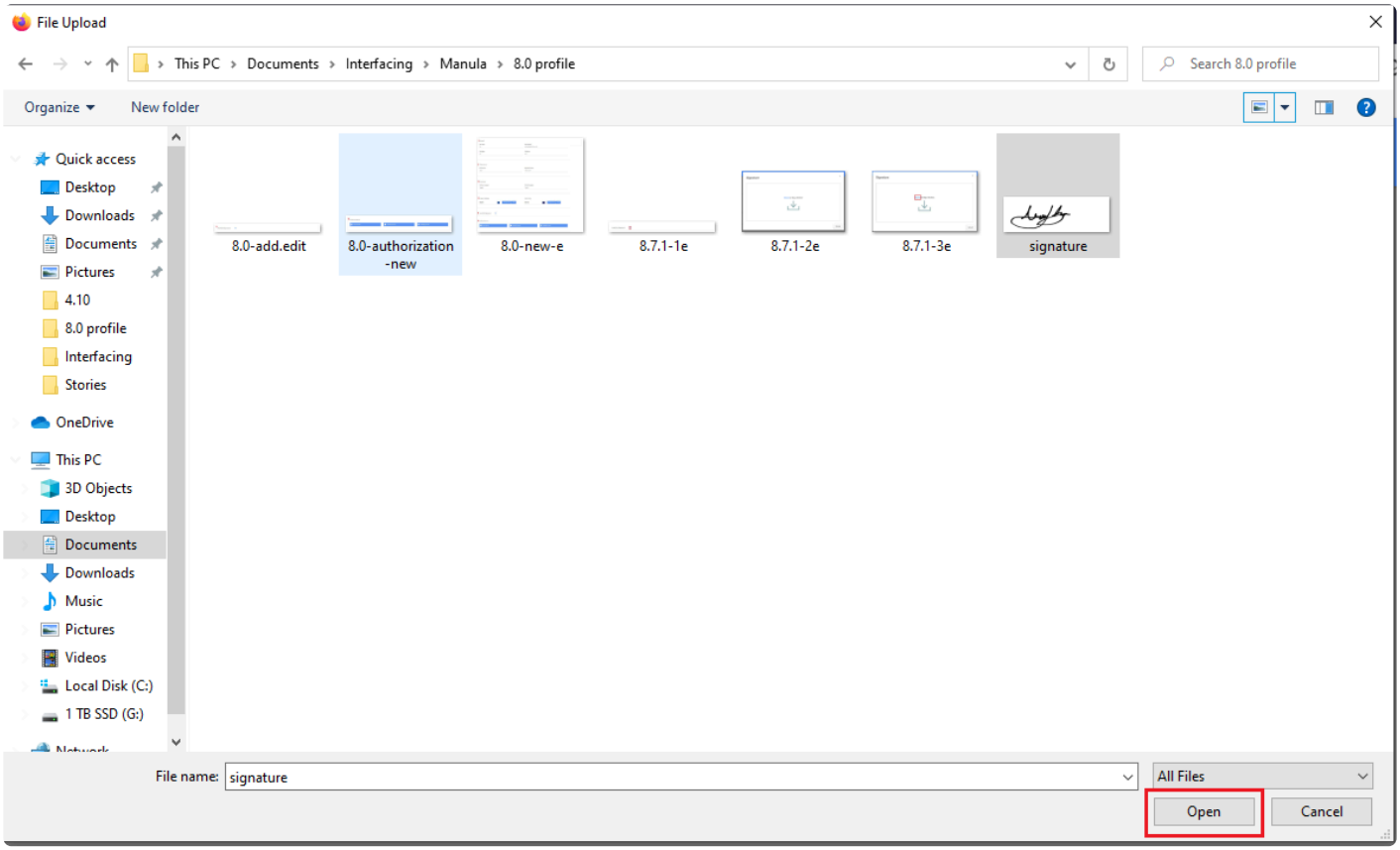
3. The following pop-up window will appear



4. To upload a signature, users can “Choose a file” or “Drag a file”



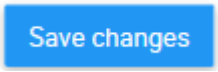
i) To choose a file click on “Choose a file.” to locate the picture you wish to upload and click on “Open”



ii) To drag and drop the file, open the folder where the file is located and drag the file to the

box

5. The user's signature will pop-up on the window

6. Click on 

to save the new signature

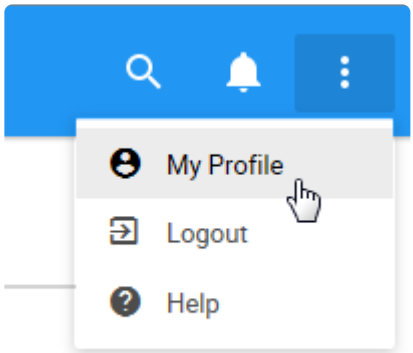
7. The new signature picture will appear on the Signature section of the “My Profile” page

8.7.2 Remove Signature

To remove a user's signature, please follow the next step

To edit a signature, please follow the next steps:

1. Navigate to the "My Profile" section on the EPC WebApp



2. Click on the button to remove the signature

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.

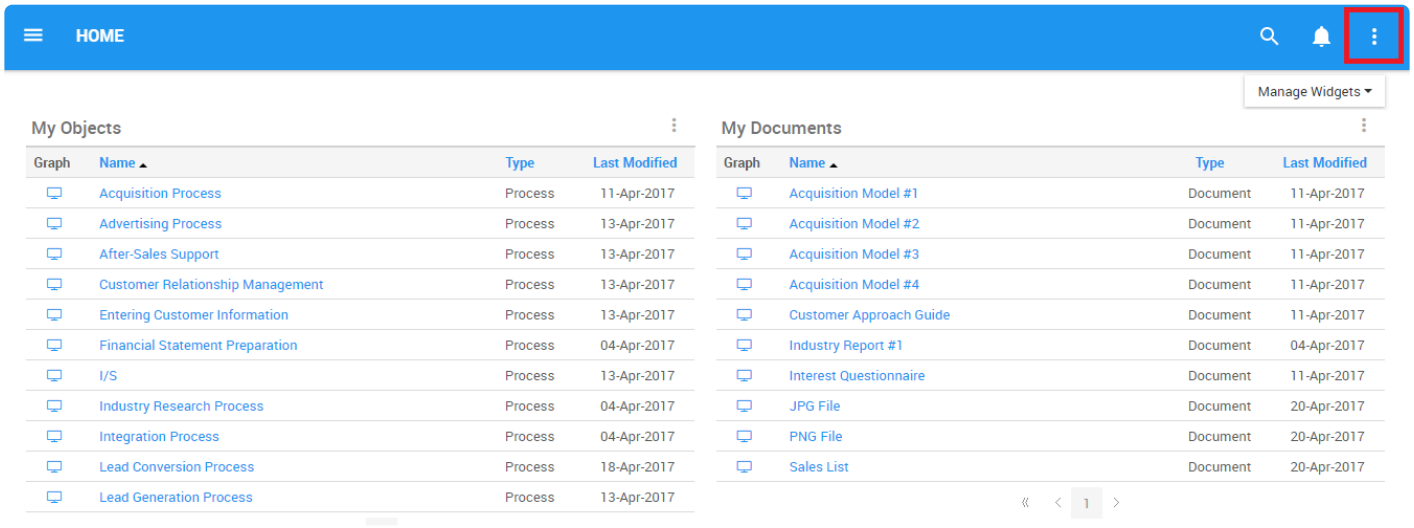
9.1 Environment Settings

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.

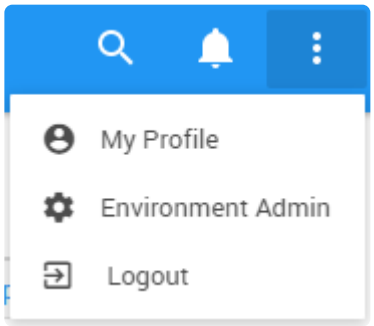
To Navigate to the Environment Admin page, please see the steps below:

1. Login to the EPC

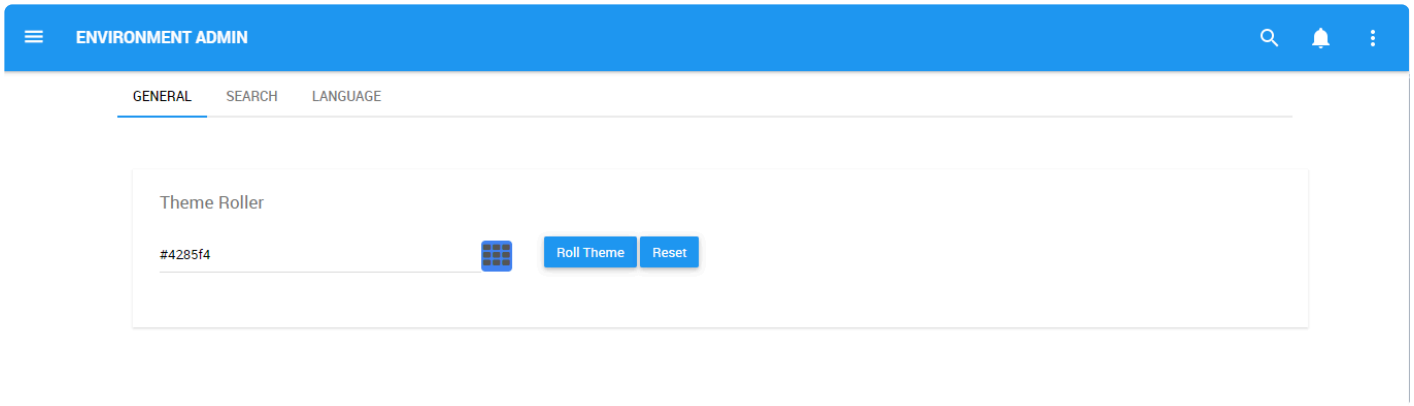
2. On the Home page, navigate your cursor to the icon



3. Select the icon and it will generate a drop-down menu

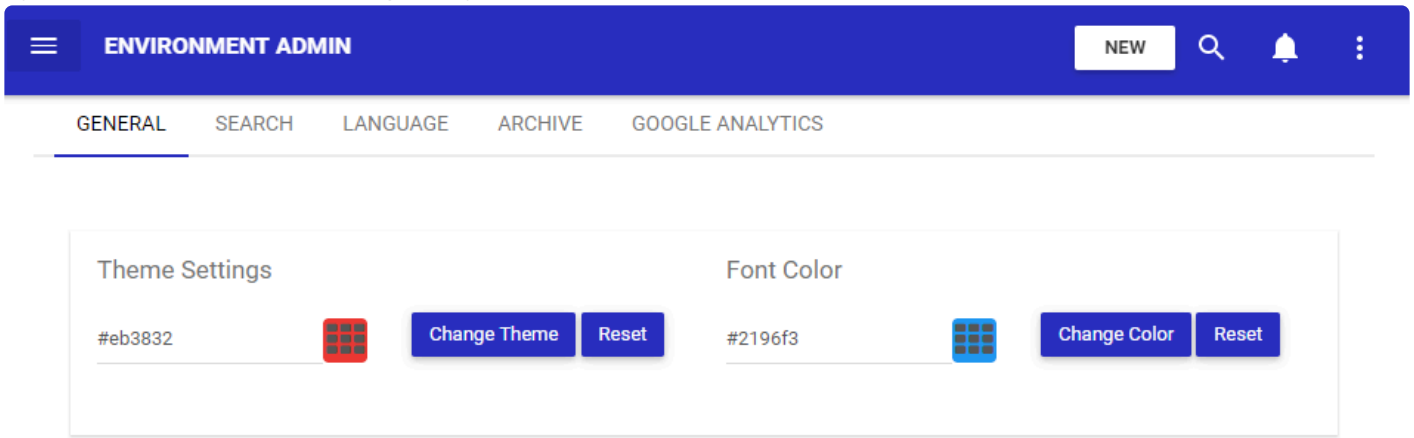


4. Select the Environment Admin option and you will be navigated to the “General” section


ENVIRONMENT ADMIN
GENERAL
SEARCH
LANGUAGE
Theme Roller
#4285f4
Roll Theme
Reset

9.1.1 General

Within the General Tab, Environment Administrators can set default theme and font color for their environments. This allows you to provide a default color for your application, as well as customize the hyperlinks and features throughout your tool.

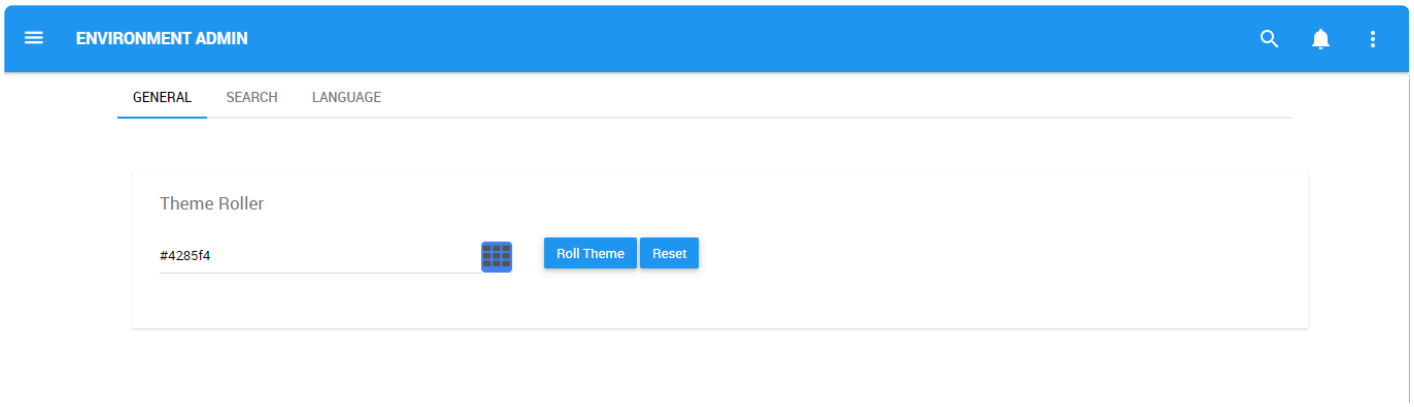


For further detail, see the sections below:

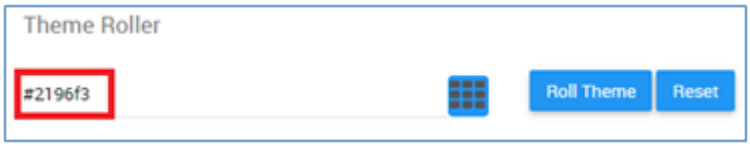
- 9.1.1.1 Theme Color
- 9.1.1.2 Default Font Color

9.1.1.1 Theme Color

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

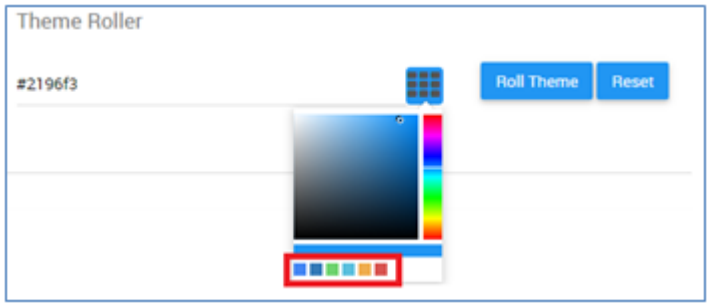
2. Select the icon

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)



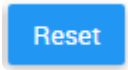
c)

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:

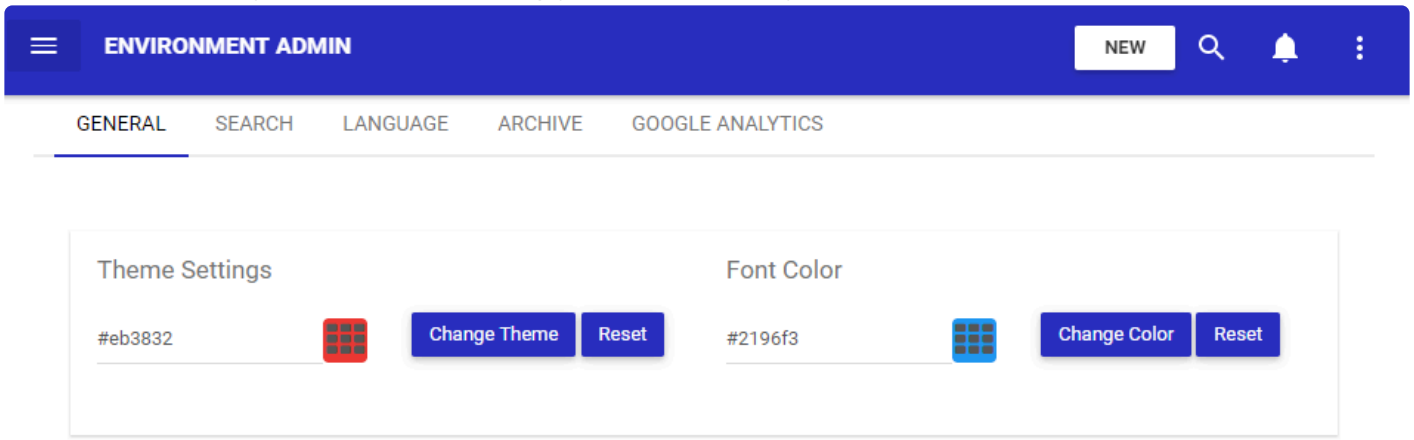
i. Select the “Reset” button 

ii. Select the desired color from the “Recent Color” bar

iii. Enter in the default alphanumeric code – **#2196f3**

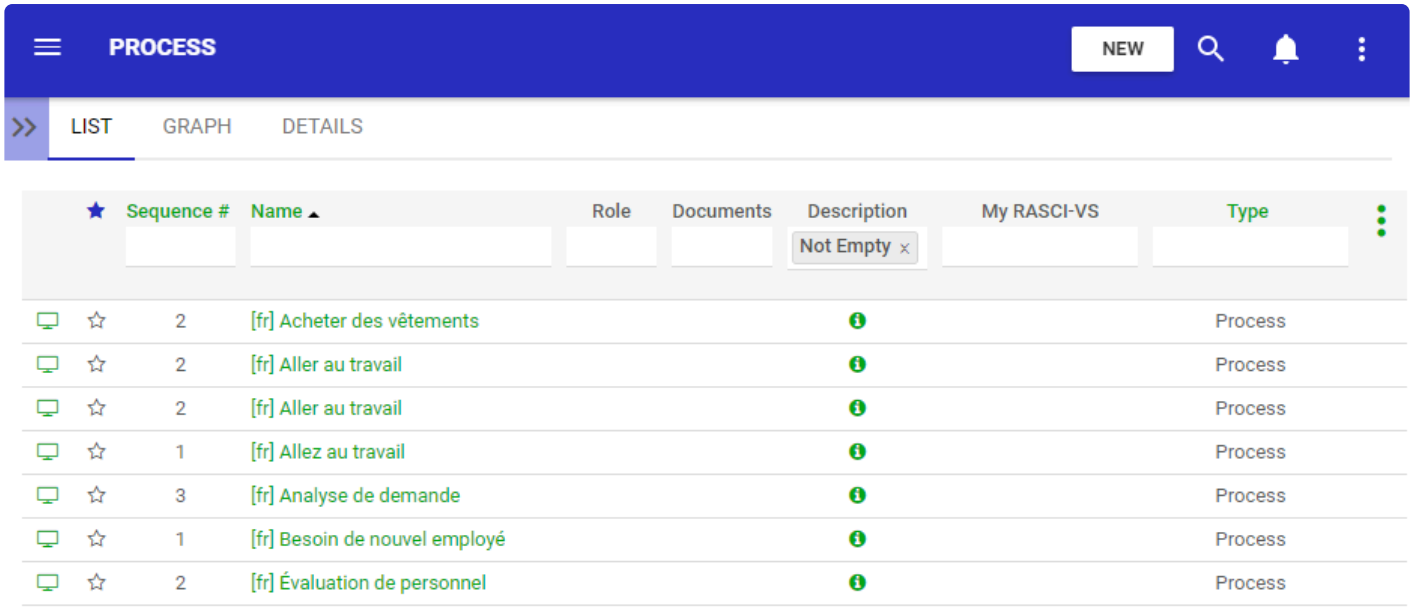
9.1.1.2 Default Font Color (Environment)

Within your environment administrator page, you can now customize the default hyperlink font color for environment across the application. Along with the theme color selection, you can use a similar image selector to define hyperlink color, allowing you to customize your environment



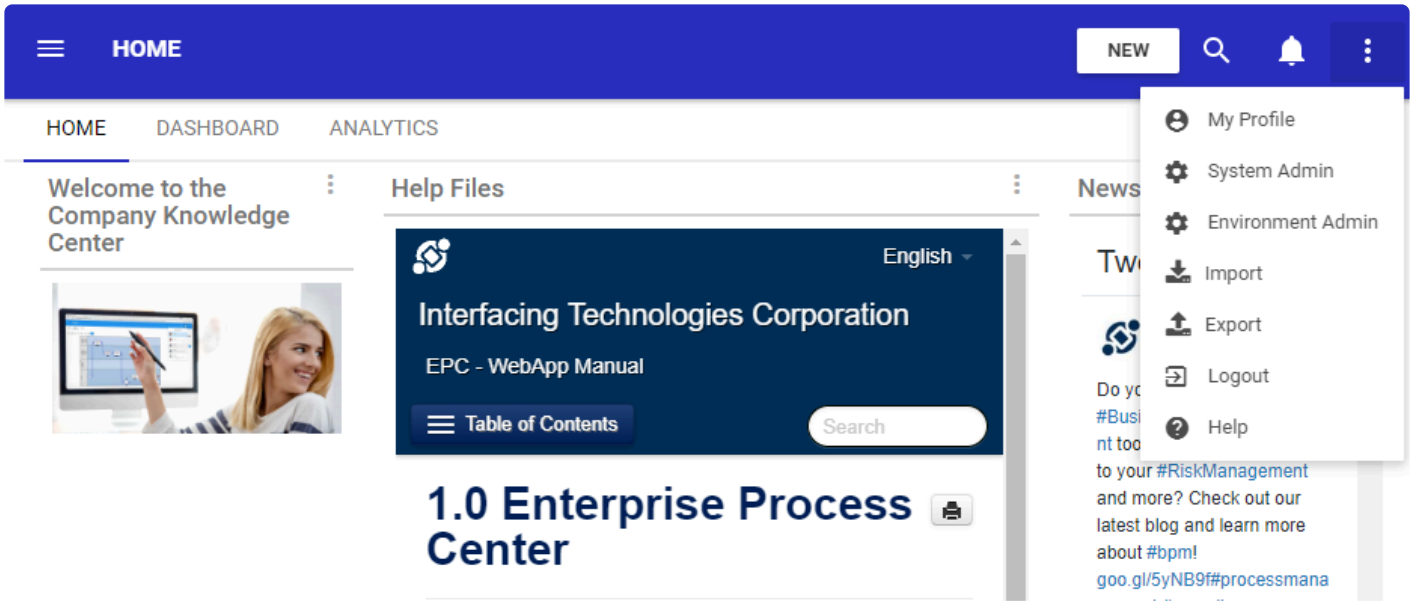
Selecting a new font color will allow you to change hyperlinks available on:

- You Environments Home Page
- Your Environments List Views
- Your Environments Details Page



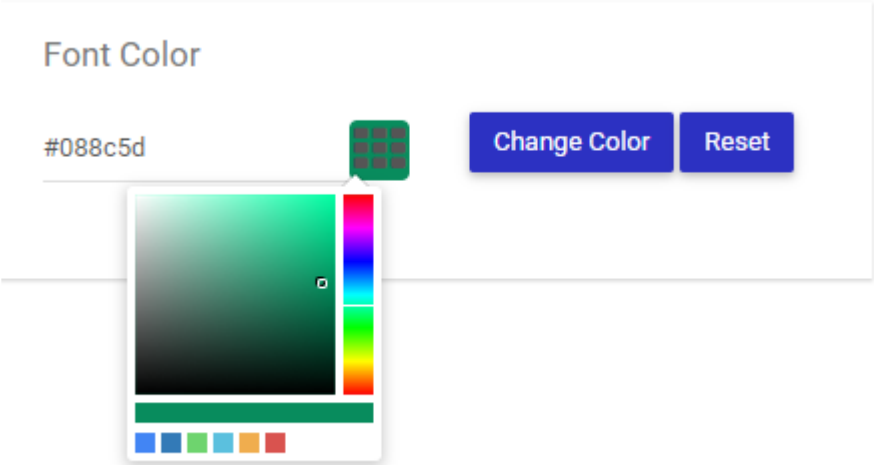
To change the default font color:

1) Navigate to your Environment Administrator – General Tab



2) To change the color

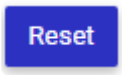
a) Type in your desire color code b) click on the color selector



3) Once you have selected the color, click on the 'Change Font' button

Revert to default

If for any reason you want to revert to the default font color defined by your administrators, simply click on the 'Reset' button and your font color will be reset.



9.1.1.3 Locked Objects – Unlock

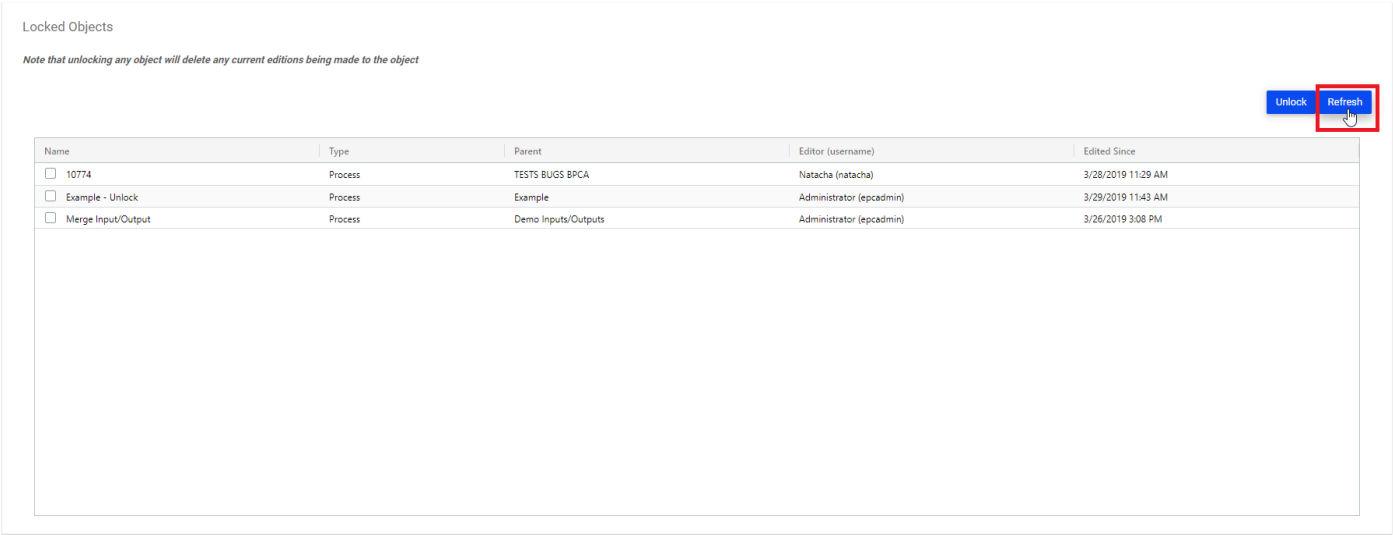
The environment administrator has a dedicated section in which he can manage the objects that are currently locked by users. The Edit Lock prevents other users to edit content as someone is already editing it. The “Locked Objects” section is a table that lists all the objects that are being edited.

The table includes, from left to right: a checkbox, the name of the object, its type, its parent, the name of the person editing and the moment it started being edited:

Name A	Type B	Parent C	Editor (username) D	Edited Since E
10774	Process	TESTS BUGS BPCA	Natacha (natacha)	3/28/2019 11:29 AM
Example - Unlock	Process	Example	Administrator (epcadmin)	3/29/2019 11:43 AM
Merge Input/Output	Process	Demo Inputs/Outputs	Administrator (epcadmin)	3/26/2019 3:08 PM

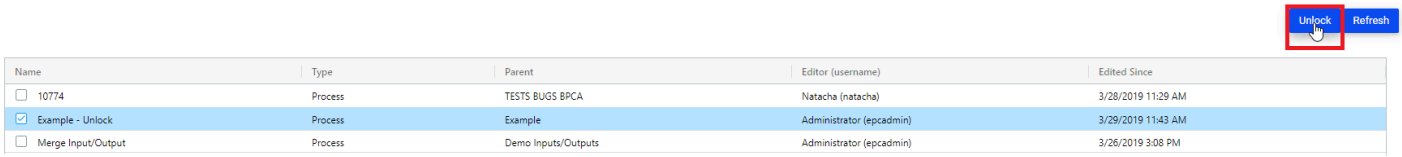
This list is also the tool that allows the environment admin to unlock an object. This functionality gives liberty to the admin to give back access to other users to an object that was initially locked. To do so, the following steps can be followed.

1. Refresh the list, to be sure that the content displayed contains the latest objects being edited.



2. Select the checkbox of the object you want to unlock.

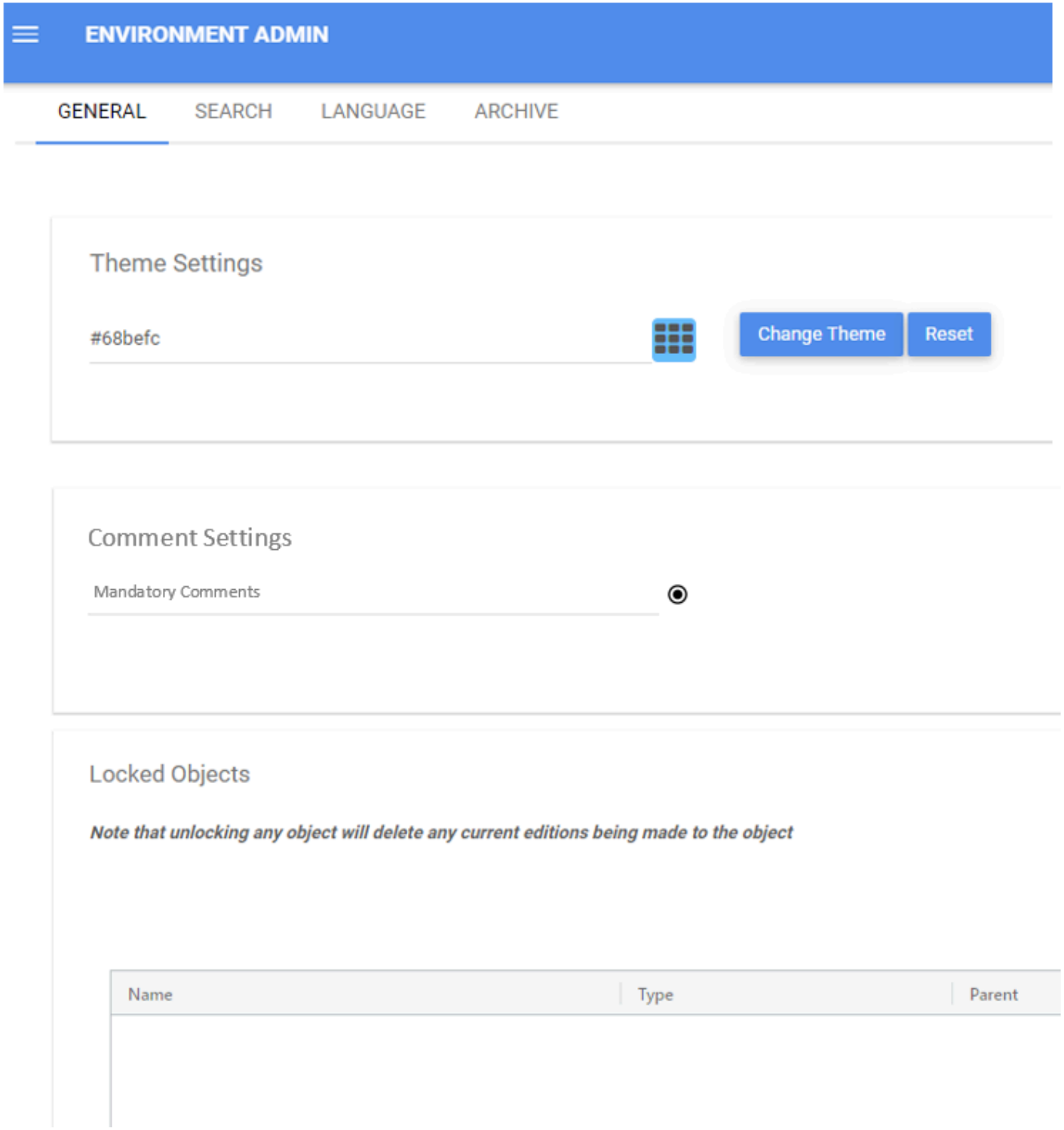
3. Click on the “Unlock” button.



Unlocking an object doesn't kick out the user that was editing, it simply allows another user to access it and lock it.

9.1.1.4 Comment Settings

Within an environment administrator page, a user can now impose mandatory comments when publishing objects and when sending,approving and rejecting both Endorsements and Approvals within the given environment.



Please see the following instructions to impose mandatory comments in the selected environment;

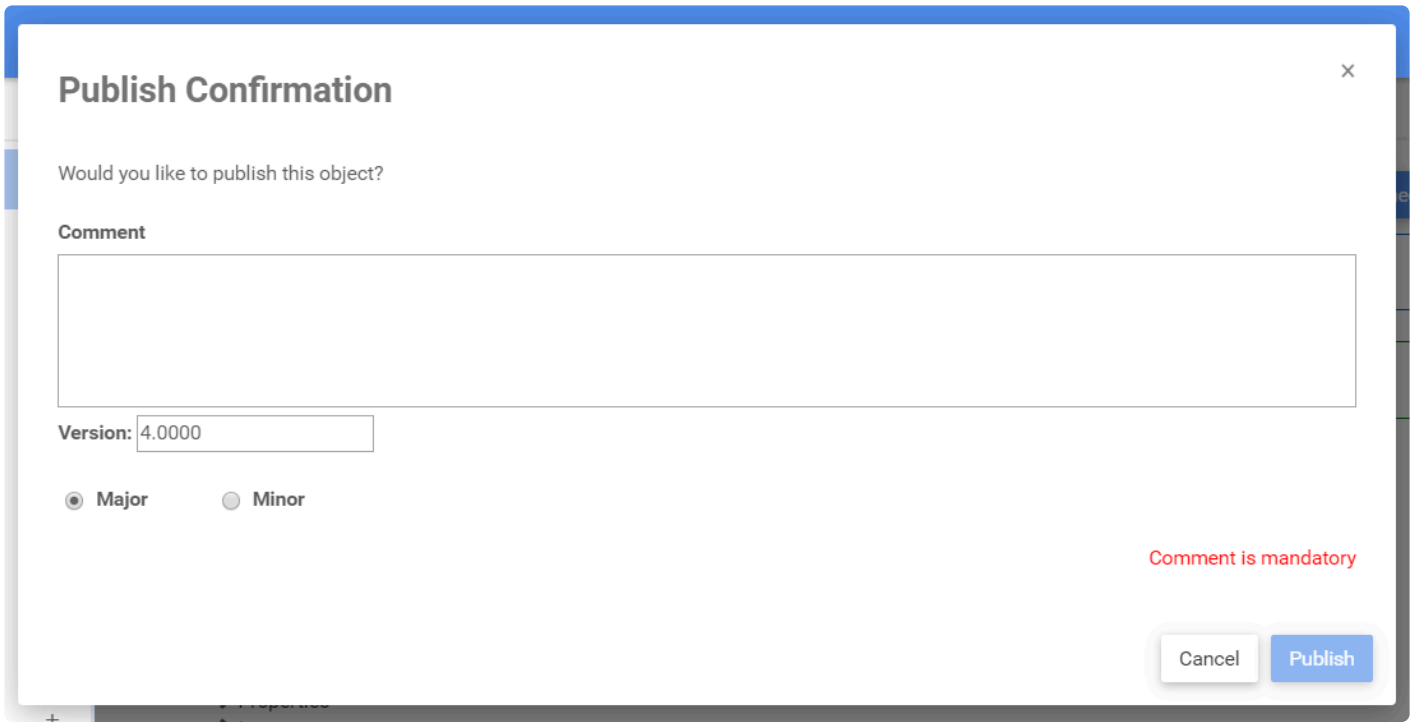
publishing objects will be used as an example

1) The mandatory comments are set OFF by default

2) To set the mandatory comments ON, simply click on the button

> ! If a “Comments are mandatory” text appears when hovering over the publish button with the cursor, it is because a mandatory commentary feature is set ON while the comment box is* empty * during an attempt publish an object.

3) When a comment is written on the box, publishing will proceed.



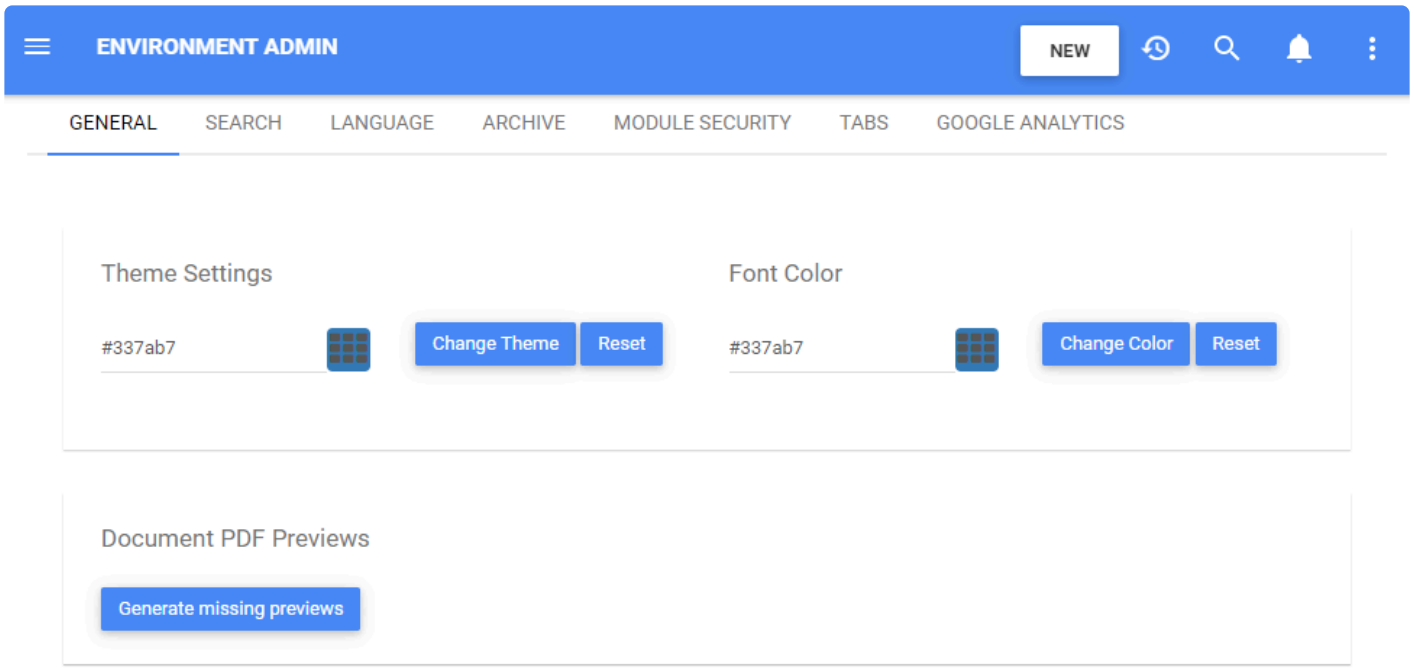
To learn how to publish objects, click here

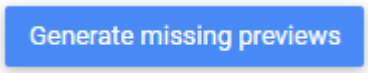
Currently, comments can be viewed and accessed from the selection below

- new version email
- confirmation box
- out of sync box
- object book
- cognos reporting

9.1.1.5 Document PDF Preview

The environment administrator has a dedicated section in which he can manage the ability to manually create a pdf preview for each of the supported documents in the system.



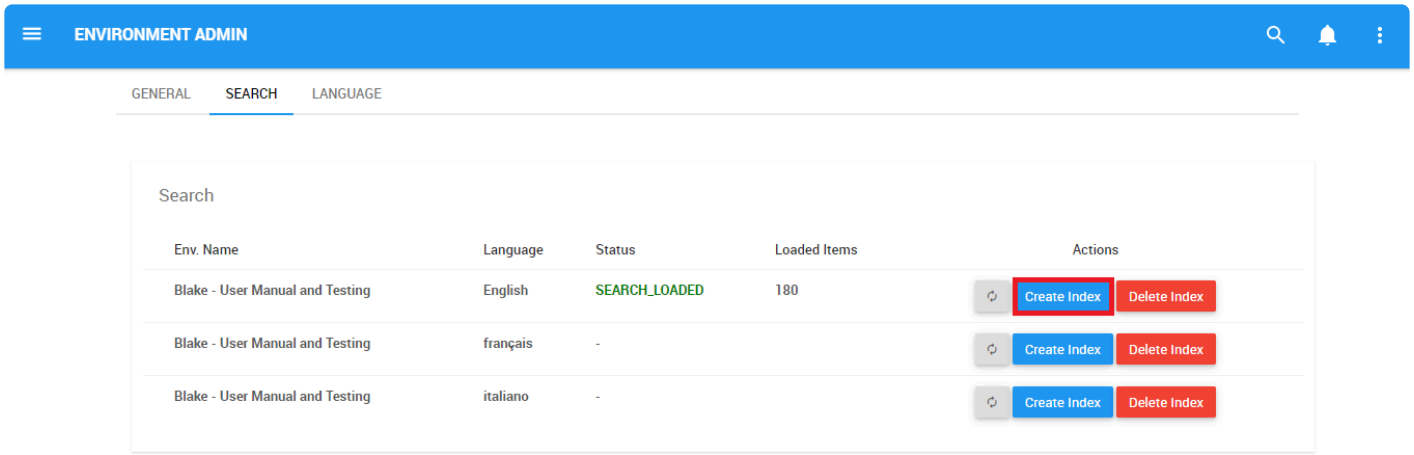
1. Click on the 

button to force the system generated preview for all the supported documents.

9.1.2 Search Index

The Search section of the Environment Admin Page controls the search indexes within the EPC. The Search function is controlled by Indexes that have been uploaded to the EPC. The Indexes themselves comprise of the different data sets that EPC Modelers have inputted and uploaded into EPC databases.

Uploading these indexes connects the EPC Modeler databases with the EPC Web App Search engine. Once the connection is made by the Admin, users can use the EPC Search Engine.

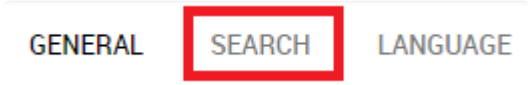


For the Search function to work effectively, Environment and System Admins must populate the indexes within the EPC. The indexes, once uploaded, allow users to search through them with the Search function. Search Indexes must be both created and subsequently refreshed to be used most effectively.

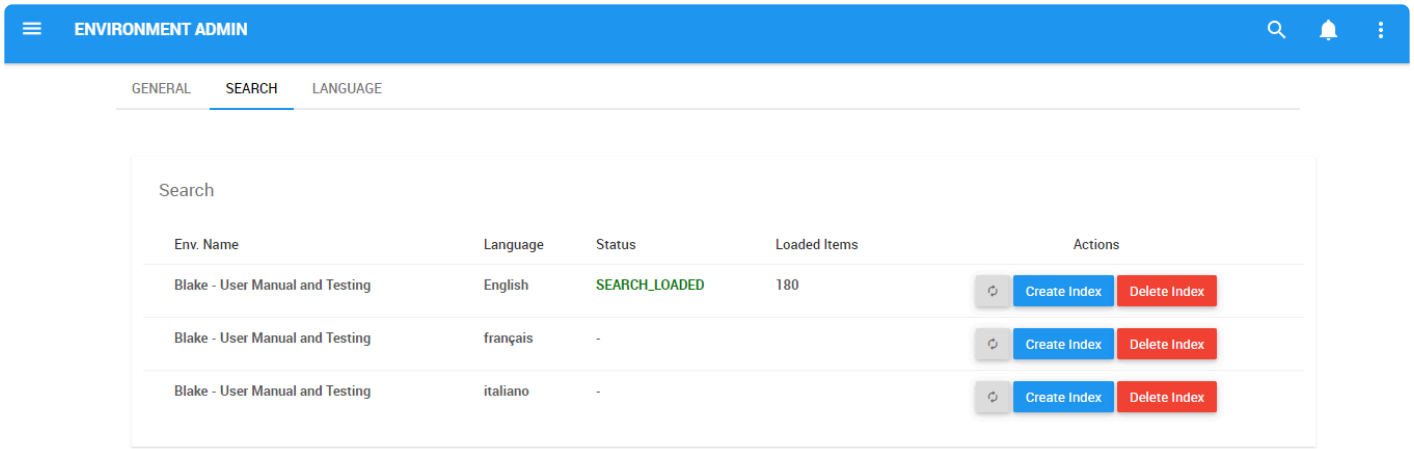
To Create Search Indexes, please see the steps below:

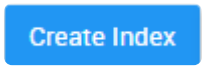
1. Navigate to Environment Admin page

2. Navigate to Search Tab

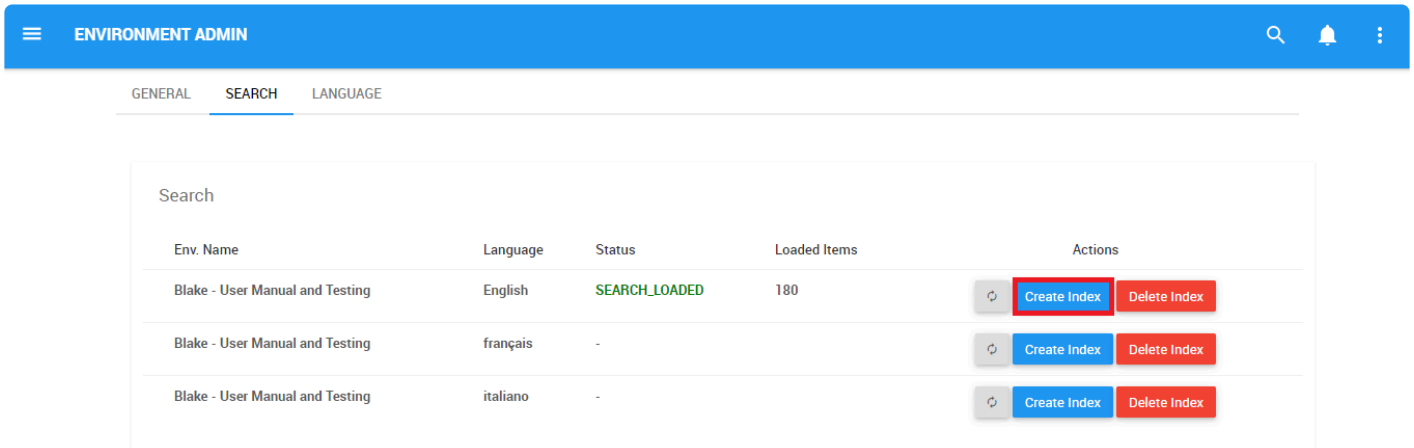


3. You will be navigated to the Search page

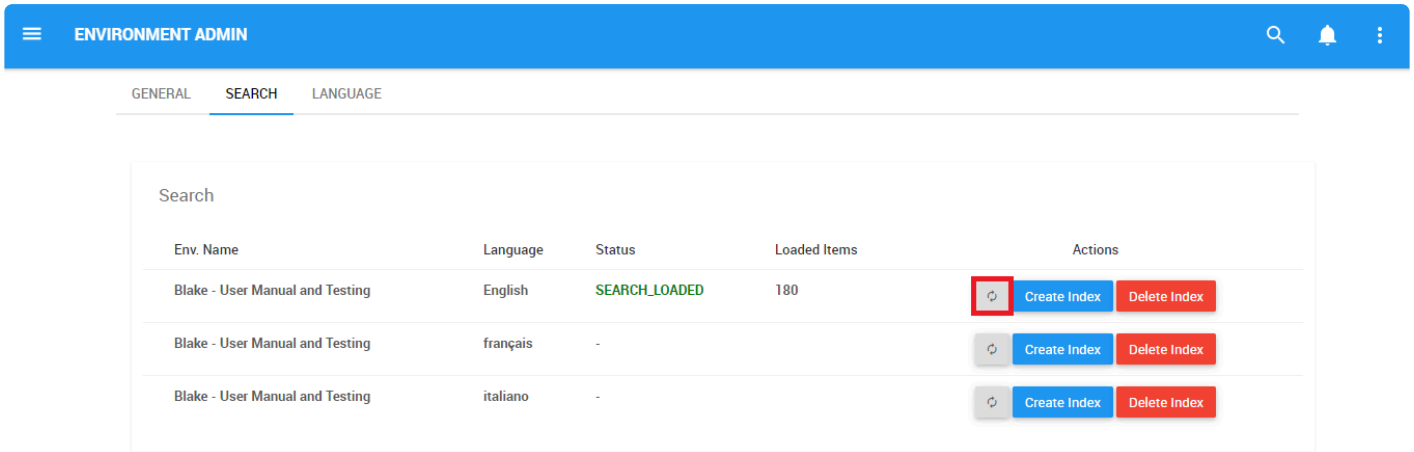


4. To create the Index, select the 

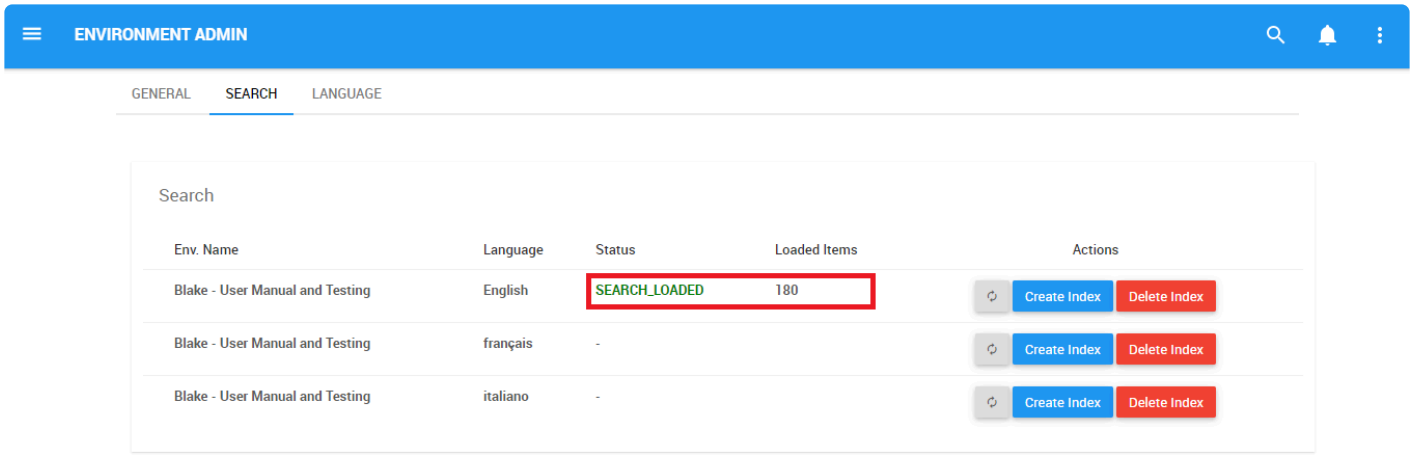
icon



5. After the index has been created, select the refresh icon



6. Once the refresh, the status of the upload will be reflected within the “Status” and “Loaded Items” column



A Search Index must be loaded for the Search bar to function. Without indexing a search, 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 administrators.

9.1.3 Language

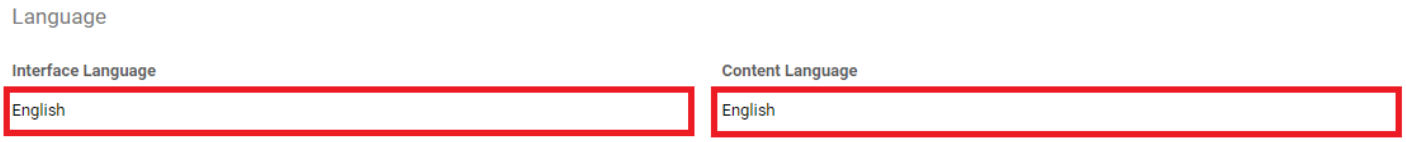
Environment Admins can select the Interface default and Content Language for the environment. The languages selected will be the default languages for end users. End users themselves can further customize their language settings.

To toggle between languages, please see the steps below:

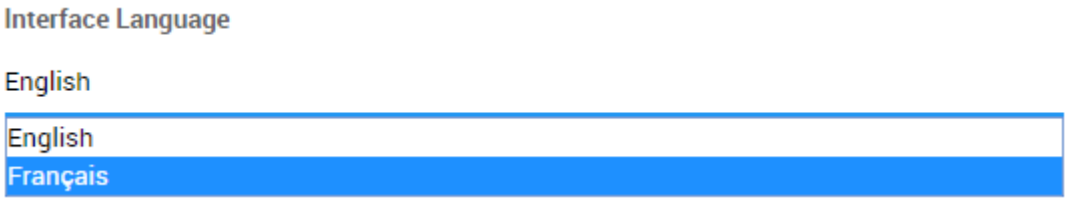
1. Navigate to the “Environment Admin” section of the EPC

2. Navigate to the Language tab

3. Select a Language text box



4. It will generate a drop-down menu featuring all the languages that you have been given access to.

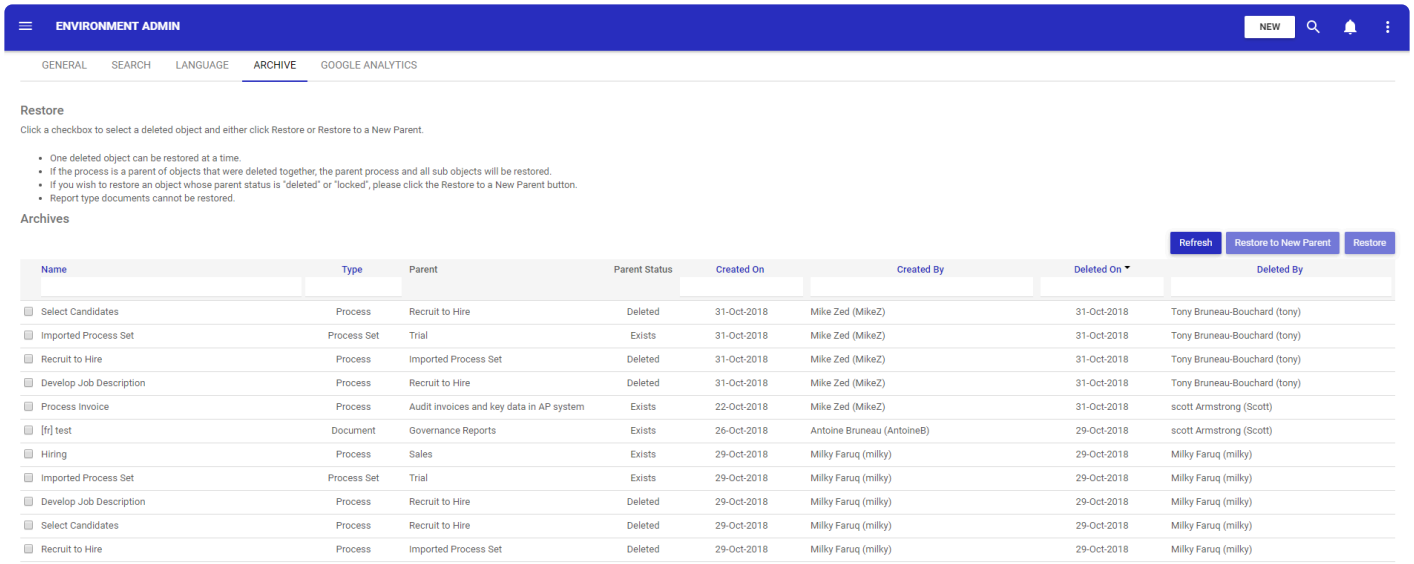


5. Select the language you wish to display. The page will be refreshed and you will now be navigating the selected language.

> Switching Content Language requires EPC’s Multilingual License.

9.1.4 Archive

Environment administrators have access to a cumulative list of all archived objects within the EPC. This list is comprised of all objects deleted within the application. This list provides your administrators with the ability to see and find any item deleted in the application, view important object specific information and restore any deleted object.



This Archive is represented in a flat list format where you can Sort and Filter for different content in the list.

Sorting & Filtering

Users can sort and filter through sections by clicking on the section header in blue, or by selecting the filter field below the section header name.

1. Sorting – Clicking on the header will sort the list alphanumerically by the item you select.
2. Filtering – Click on the section below the header, type search or select an item from the dropdown

Section	Details
Name	Name of the deleted object
Type	Type of object deleted
Created On	Date that the object was created in the system
Created By	User which created the object in the system
Deleted On	The date of deletion for the object
Deleted By	The user which deleted the object

9.1.4.1 Restore Deleted Objects

Environment Administrators can restore deleted objects in the EPC. This allows your administrators to restore any objects deleted accidentally, or restore any previous version on objects easily.

Users can:

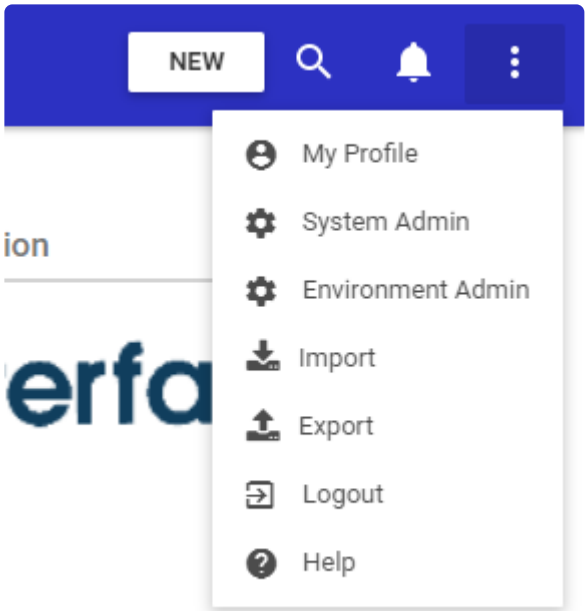
1. Restore deleted objects to their original location, or
2. Restore objects to a new location (Restore to New Parent) if the Parent has been moved, deleted, or if you simply want to move the object

! Please note the restrictions to restoring deleted objects:

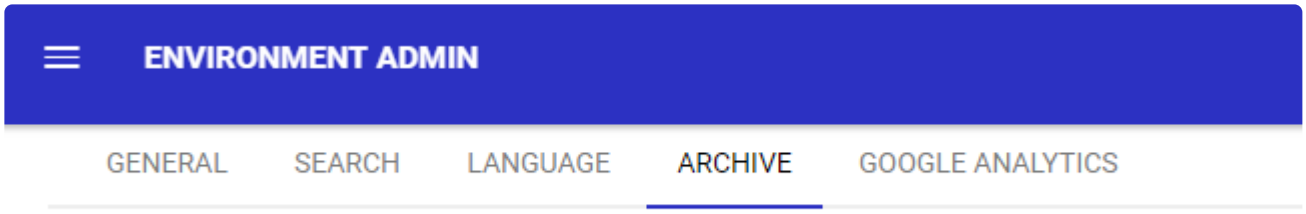
- One deleted object can be restored at a time.
- If the process is a parent of objects that were deleted together, the parent process and all sub-objects will be restored.
- If you wish to restore an object whose parent status is “deleted” or “locked”, please click the Restore to a New Parent button.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

To restore a deleted object:

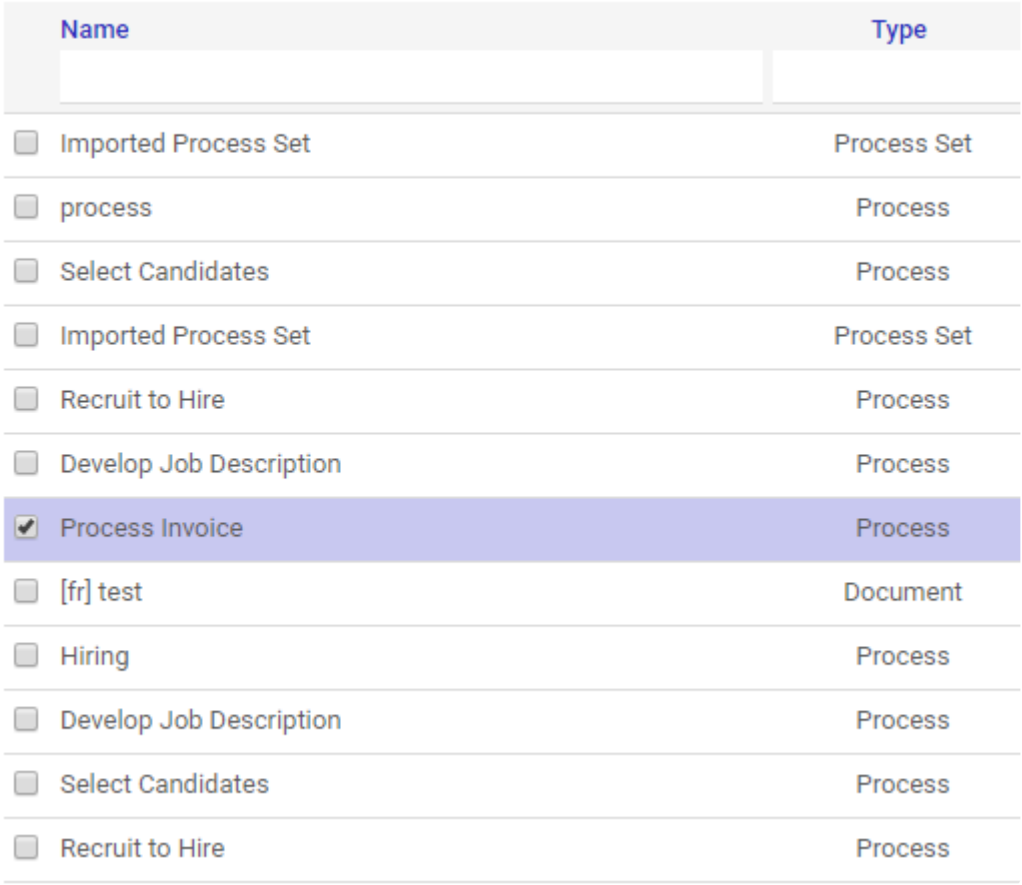
1) Navigate to your Environment Administrator section



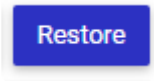
2) Select the **Archive** Tab



3) Select the object you wish to Restore



4) Select the Restore button



You object will be restored.

Lock

For all objects except processes, you can restore your deleted object if the parent still exists, even if it is locked by another user.

For processes, you can’t restore your deleted object if the parent is locked by another user. The “Restore” button will not be available, only the “Restore to new parent”.

9.1.4.1.1 Restore to New Parents

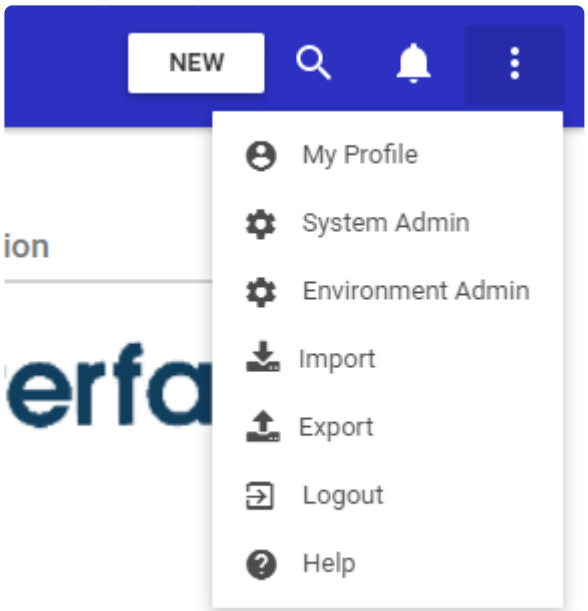
If a parent of an object you wish to restore has been moved or deleted, or simply if you wish to restore a deleted object to a new location, administrators now have access to the “Restore to New Parents” feature. This feature allows your administrators to select a new location and restore deleted objects to that location.

This feature can be used when:

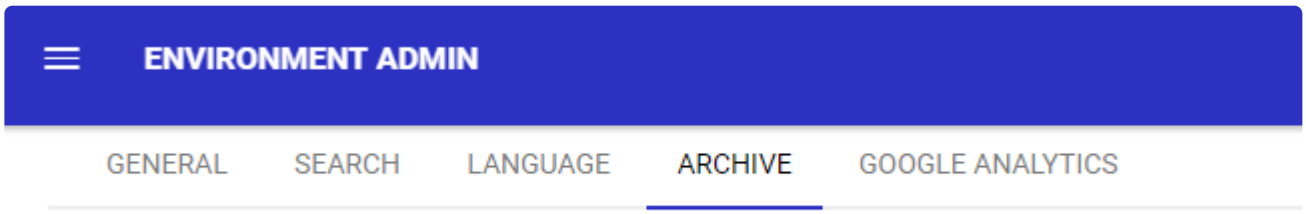
- You wish to restore accidentally deleted objects and object hierarchies
- When you wish to restore a previously outdated item
- When you want to relocate deleted items

To restore a deleted object to new parents:

1) Navigate to your Environment Administrator section



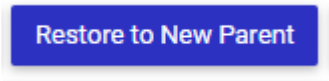
2) Select the **Archive** Tab



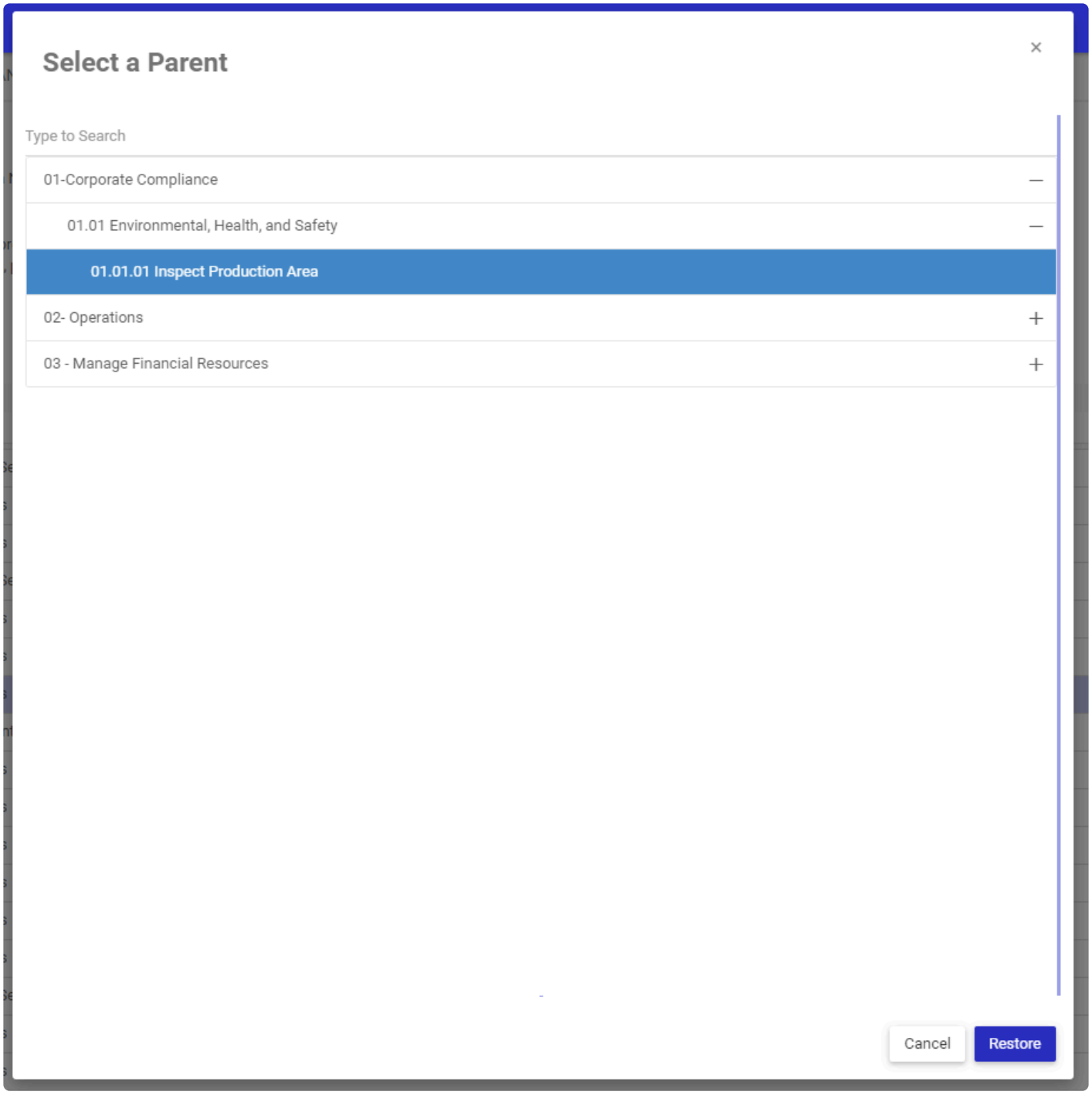
3) Select the object you wish to Restore

	Name	Type
☐	Imported Process Set	Process Set
☐	process	Process
☐	Select Candidates	Process
☐	Imported Process Set	Process Set
☐	Recruit to Hire	Process
☐	Develop Job Description	Process
☑	Process Invoice	Process
☐	[fr] test	Document
☐	Hiring	Process
☐	Develop Job Description	Process
☐	Select Candidates	Process
☐	Recruit to Hire	Process

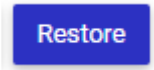
4) Select the Restore to New Parent button



5) This will generate a parent selector which will allow you to select a new location for the object. Use the navigation panel to select a new location for the object.



6) Select the **Restore** button



You object will be restored.

9.1.5 Google Analytics

Google Analytics is a web analytics service offered by Google. It allows users to track and report website traffic. In the context of the EPC, Google Analytics can offer better insights into how users within an organization are using the tool. It can track user behavior across the tool and report on what and where users spend the most time on, which processes are viewed the most, which documents are the most downloaded, etc.

To set up Google Analytics for EPC, you will need an Analytics account. Google Analytics can then be set up from the Environment Admin menu, under the Google Analytics Tab.

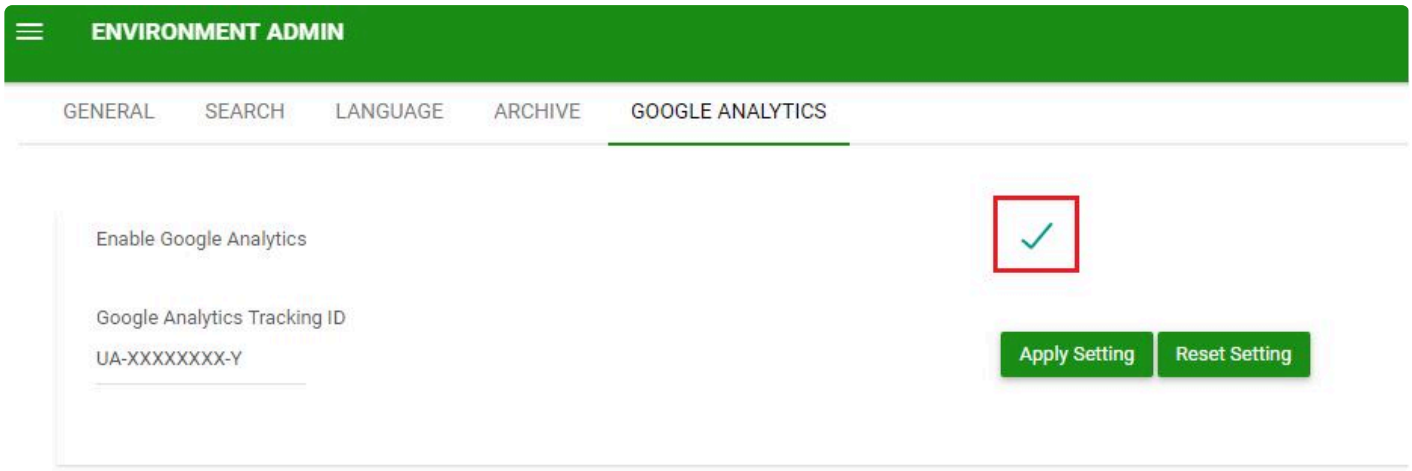
Tracking ID

1. To obtain your tracking ID, sign in to your Analytics Account
2. Click Admin
3. Select an account from the menu in the ACCOUNT column
4. Select a property from the many in the PROPERTY column
5. Under PROPERTY, click Tracking Info > Tracking Code. Your tracking ID is displayed at the top of the page

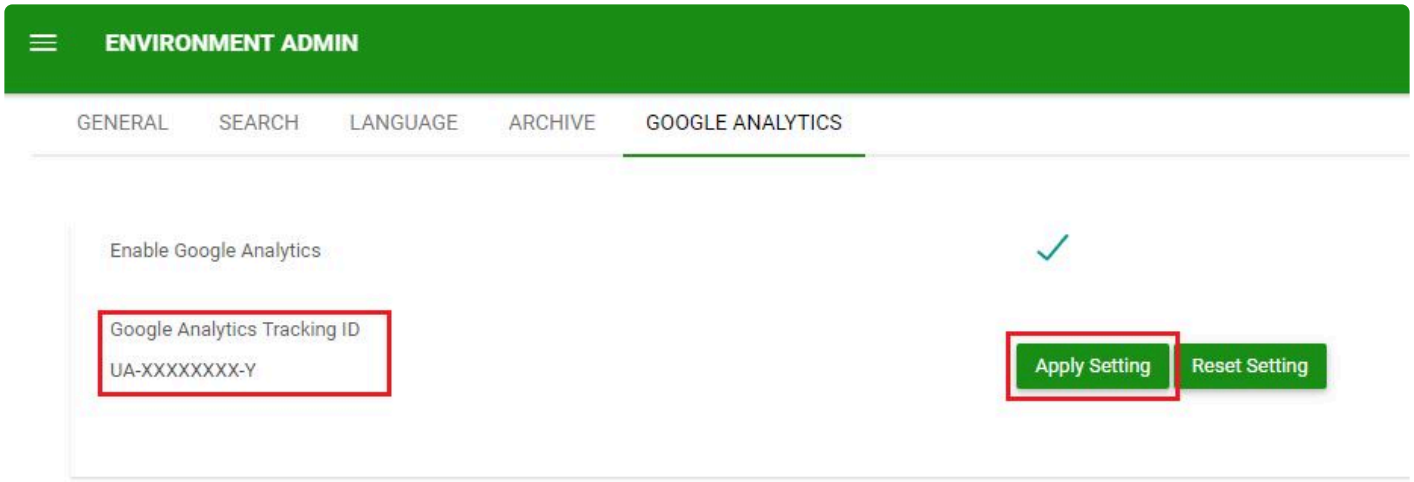
For more in depth information on the tracking ID, please refer to the [Google Analytics Help Section]

Enabling and Linking the Analytics Account in EPC

1. To enable google analytics, click on the checkbox as shown below



2. Enter your Google Analytics Tracking ID in the box, then click Apply Settings



3. Google Analytics should now be set up for the EPC.

Disabling and Resetting Google Analytics in EPC

To disable Google Analytics, uncheck the Enable Google Analytics checkbox. GA will no longer track metrics.

Clicking on

will change the tracking ID to the default value.

9.1.5.1 Setting Up Google Analytics

To set up analytics tracking, you will need the following:
1) A google account (Gmail, Google Drive, etc.)
2) Set up your analytics tracking account

To set up analytics tracking, please see the steps below:

Create the Google Cloud project for the client and authorize the domain

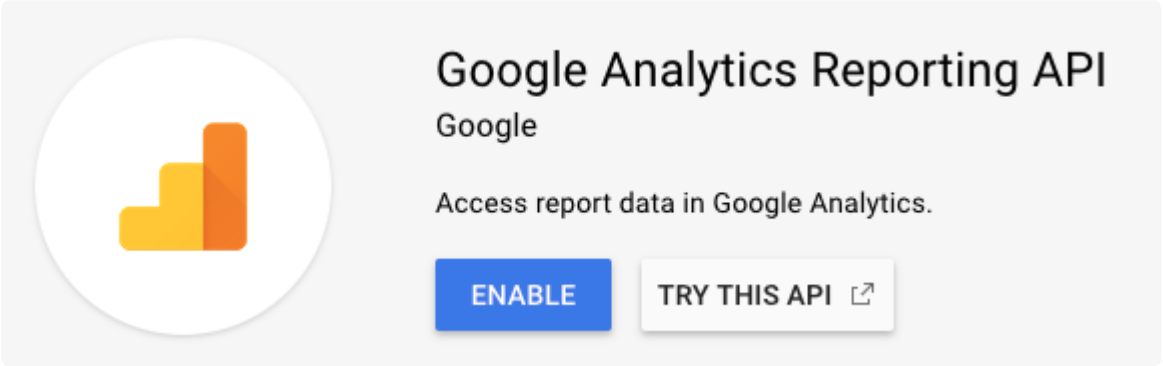
1) Connect to the Google Cloud console
https://console.cloud.google.com/

2)Click Create a New Project.

3) From the “Select a Project dropdown” Select your newly created project.

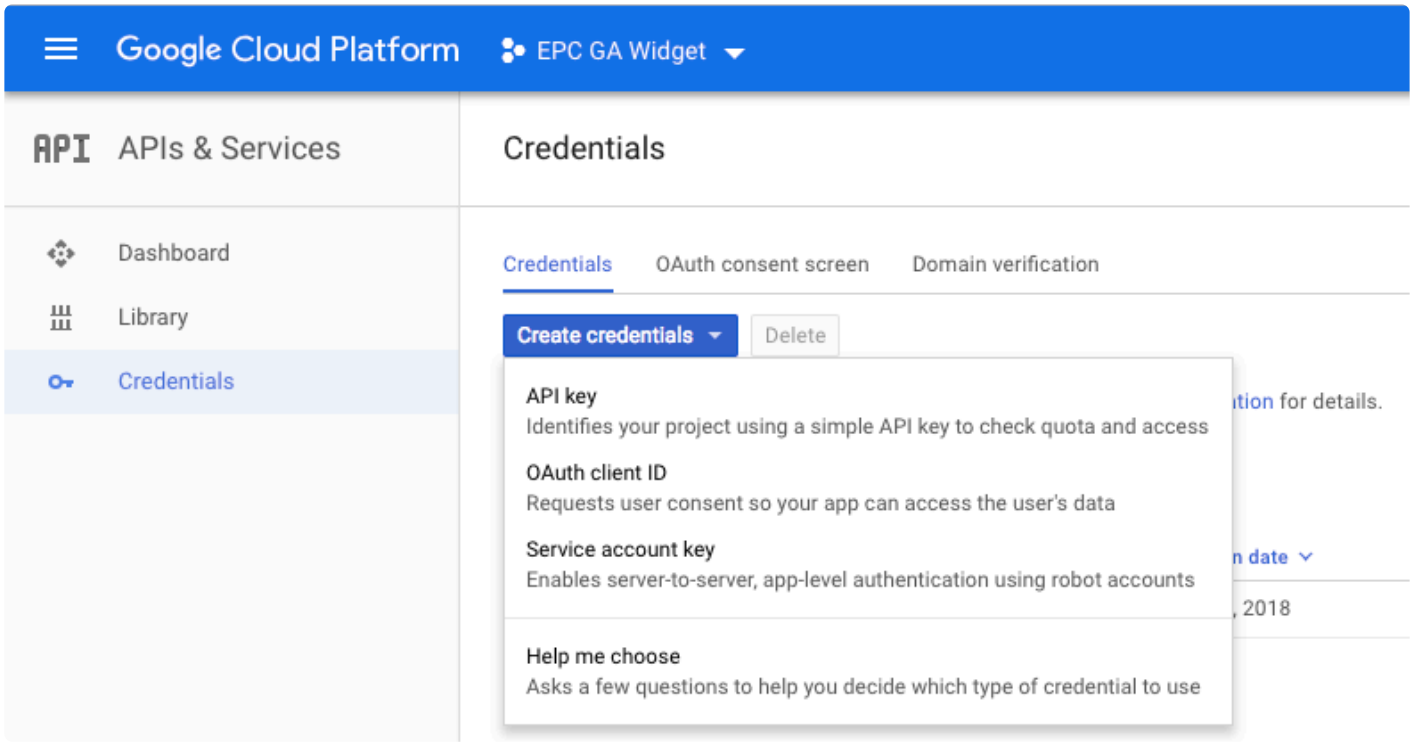
4) Go to the API & Services > Library section.

5) Search for Google Analytics Reporting API and enable it.



6) Go to the API & Services > Credentials section.

7) Click on “Create credentials” then “OAuth client ID”.



(this next step won't appear if you already have a client ID configured for this project)

8) Click Configure Consent Screen Button

9) Enter Application Name e.g "Recruiting App"

10) Enter Authorized Domains = interfacing.com

11) Click Save Button
Now from the UI that displays "Create OAuth Client ID" Header

12) Click Radio Button "Web Application
You'll see an Authorized JavaScript origins section where you can add URLs to add to the whitelist.
Meaning: Under text "Authorized Javascript origins" you will see a text box

13) Enter your webapp URL inside textbox e.g http://epc10test.interfacing.com

- Here are the conditions provided by Google to add a valid URL: For use with requests from a browser. This is the origin URI of the client application. It can't contain a wildcard (https://*.example.com) or a path (https://example.com/subdir). If you're using a nonstandard port, you must include it in the origin URI.

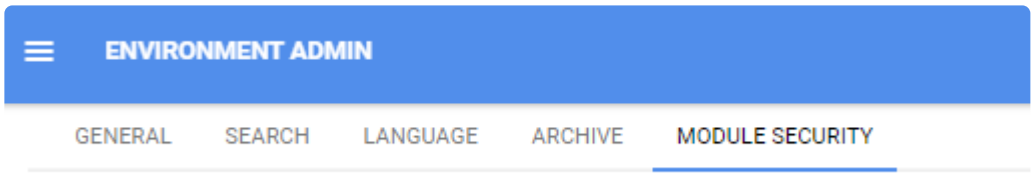
14) Click Create Button

At this stage you will a UI Popup that displays "Client ID", please copy paste it on your notepad or you could click Copy on extreme right corner of UI

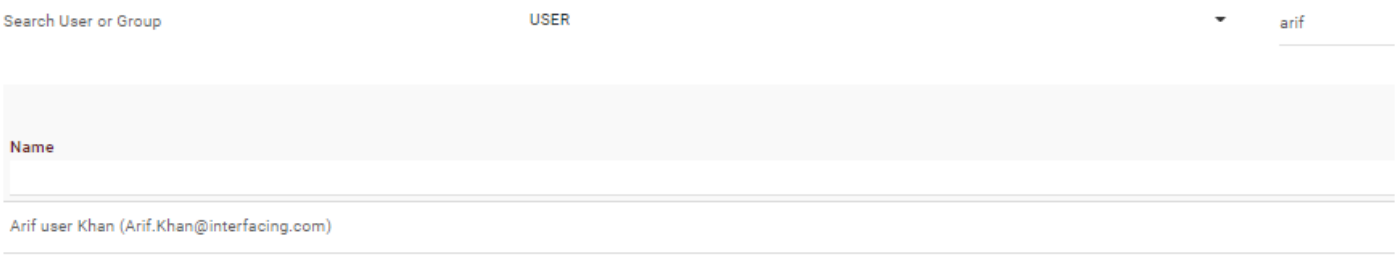
9.1.6 Module Security

Security on Module is an added level of security that can be given to users and groups by the environment admin. An admin can grant user access to any modules of an environment by navigating to the Module Security Tab in Environment Setting. By default, all users and groups have access to all the modules.

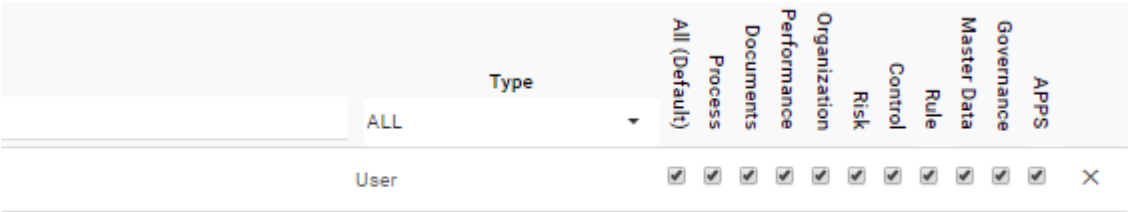
1. Navigate to the tab called MODULE SECURITY in the Environment Admin page



2. Add a user or group to the Module Security list by typing the user's username, first name, or last name, or the group's name



3. By default, the user or group will be granted permission to view all the modules.



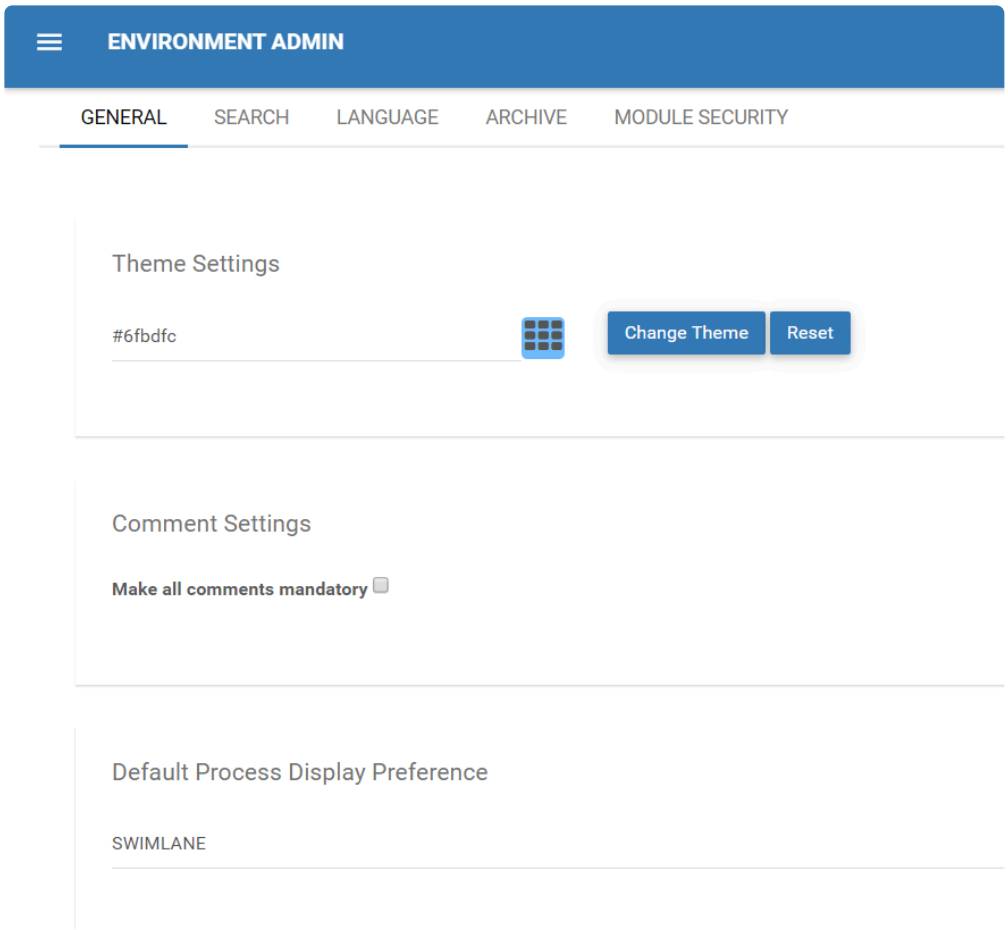
Rules
Only an environment or system-level admin can grant permission of adding & updating a user or a group in the Module Security Tab
When a module is checked off, then the designated user will not see the module in the module list selection

When updating the permission of a user or group on the visibility of the module, it will only impact per environment
By default users & groups have to access to all the module that they are licensed
When an admin unchecks a module box for a user/group, then it disappears for that user on that environment and in the module tree list selection

! When a user is removed from the specific environment, they are automatically removed from the module security list.

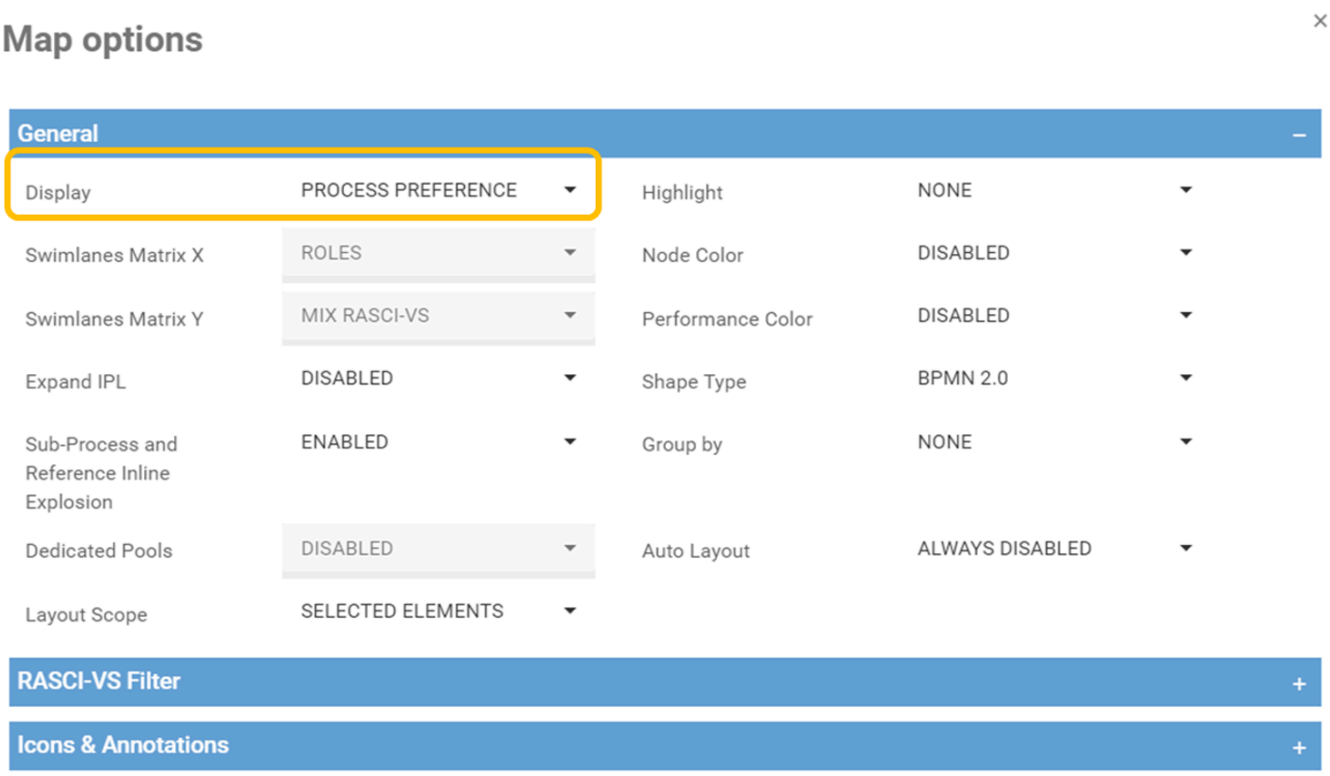
9.1.7 Process display preference

The “Default Process Display Preference” field’s purpose is to allow an authorized user to choose the default process setting for any new process set and per environment.



Rules

- By default, every new environment Process display preference will be Swimlane.
- The users settings will override the process preference display setting in the environment admin page. Meaning that if a user chooses to change in the process setting to another view int he map options, the process will now be view as this display.



To have more information about Map options click here: Map options

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 3 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.)

3. **Impact Graph**: This allows an Environment Admins have the ability to set the Impact Graph default layouts.

4. List: This allows an Environment Admin to set the default columns that will appears on a users' list view for each module.

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.

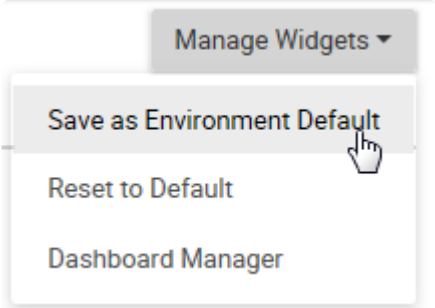
To Set a Home Page Widget Layout as a default layout, please see the steps below:

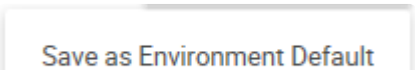
1. Log into the EPC

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.

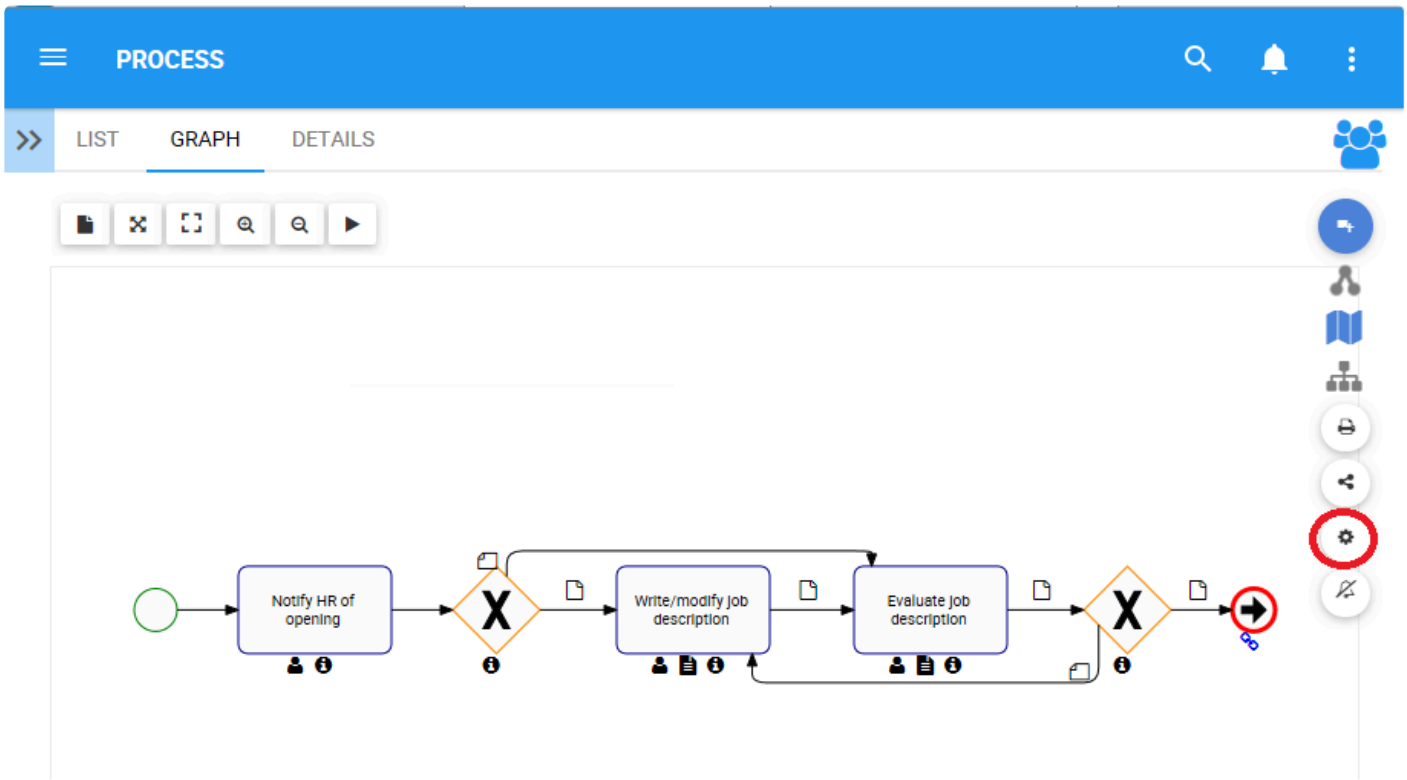
To Set Process Map Graph default settings, please see the steps below:

1. Login to the EPC

2. Select a Process within the Process Module

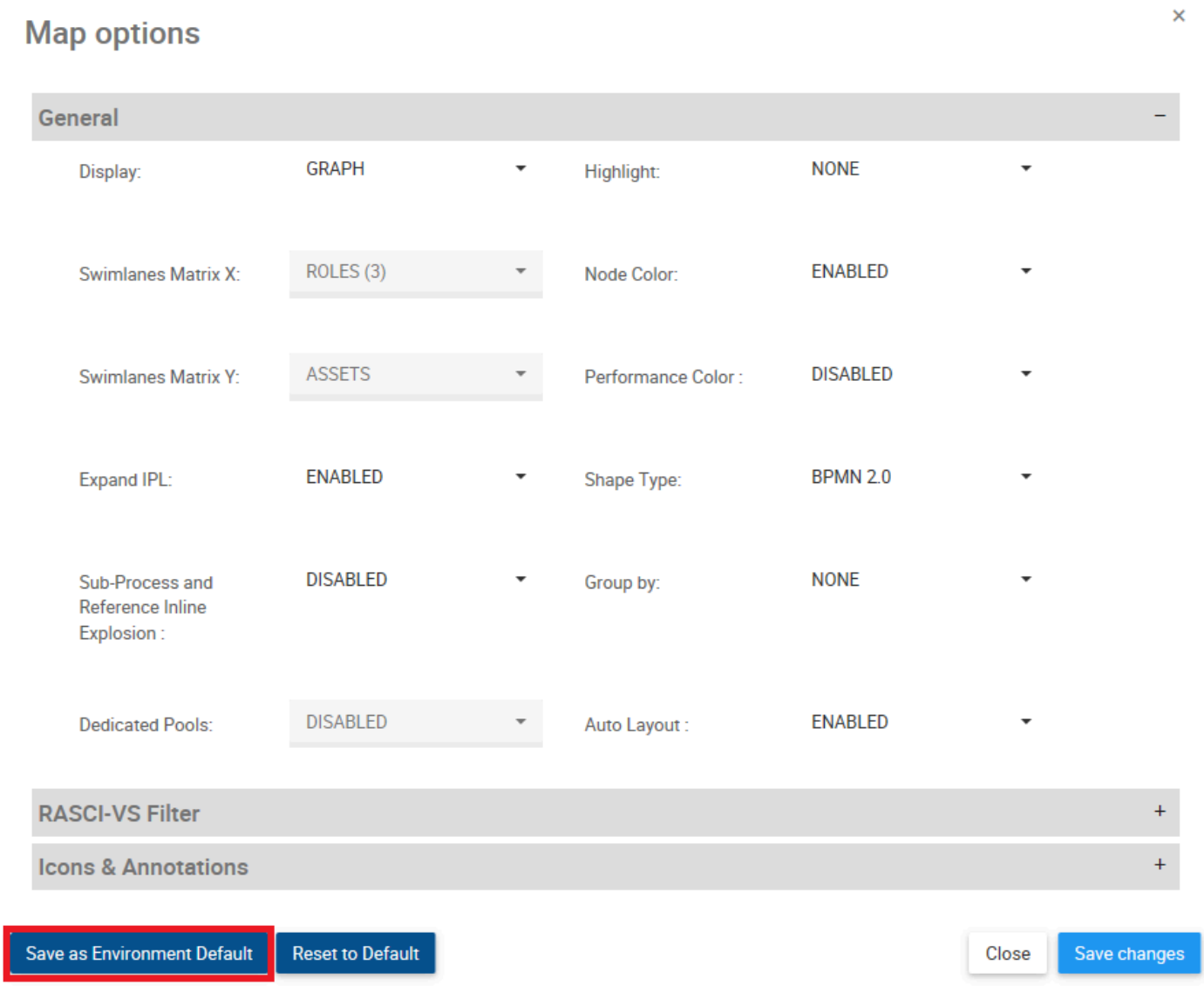
3. Navigate to the Process's Map Graph

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



To navigate between parent and children process graph, simply use the up arrow next to the title.

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.

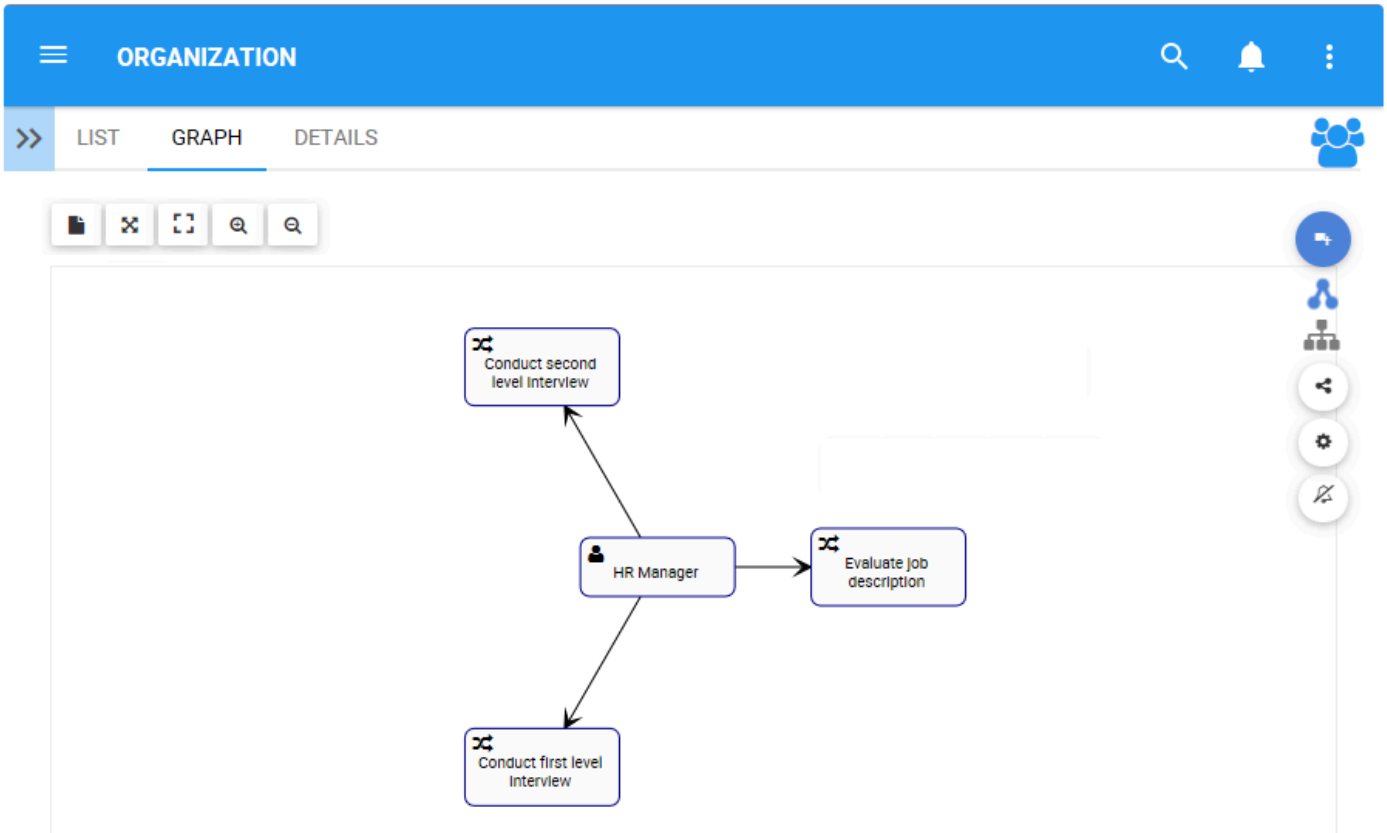
To Set Impact Graph default settings, please see the steps below:

1. Login to the EPC

2. Select a an item you desire to view in an Impact Graph within any module

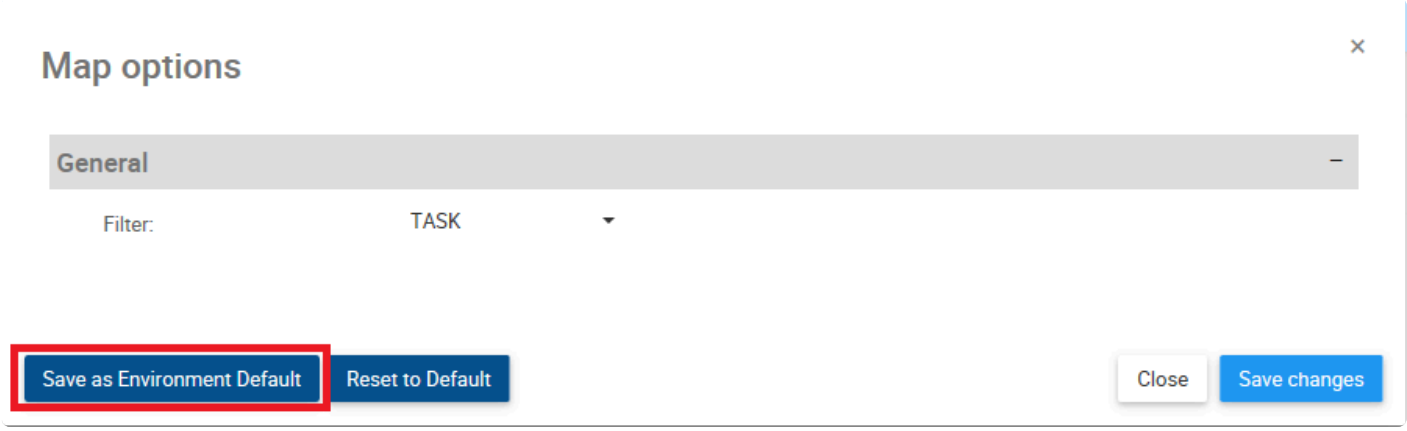
3. For this example, navigate to a role within the Organization Module and view it in an Impact Graph

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

9.2.4 List View Column Configuration

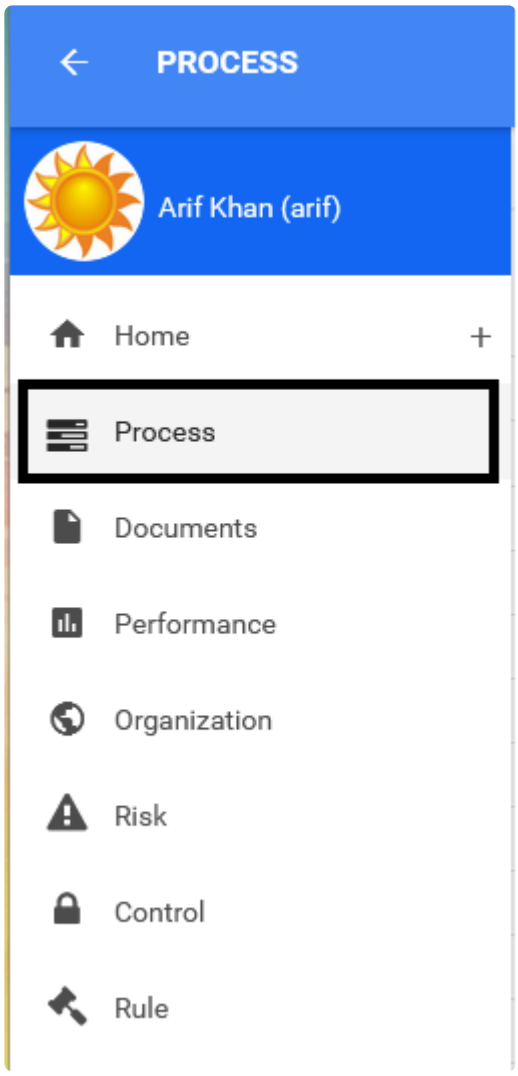
Environment Admin have the ability to set the columns in every module as a default. Selecting the default layout for columns will allow environment admins to control the initial list view for all users and provide a company standard to everyone.

To set columns as a default layout, please see the steps below:

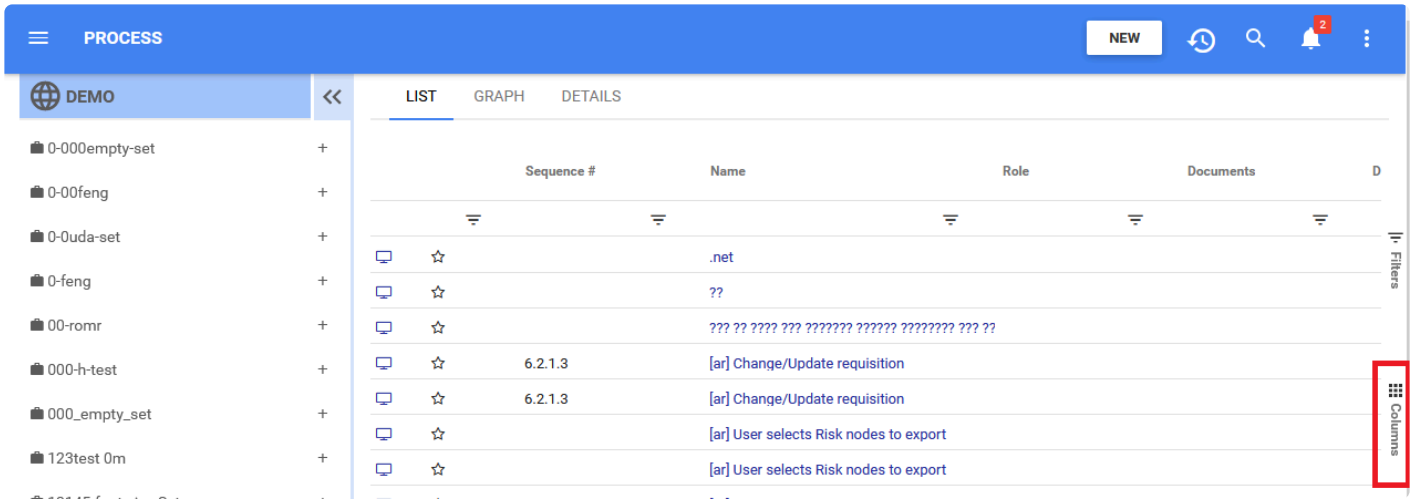
1.Log into the EPC

2. Go to your desired environment

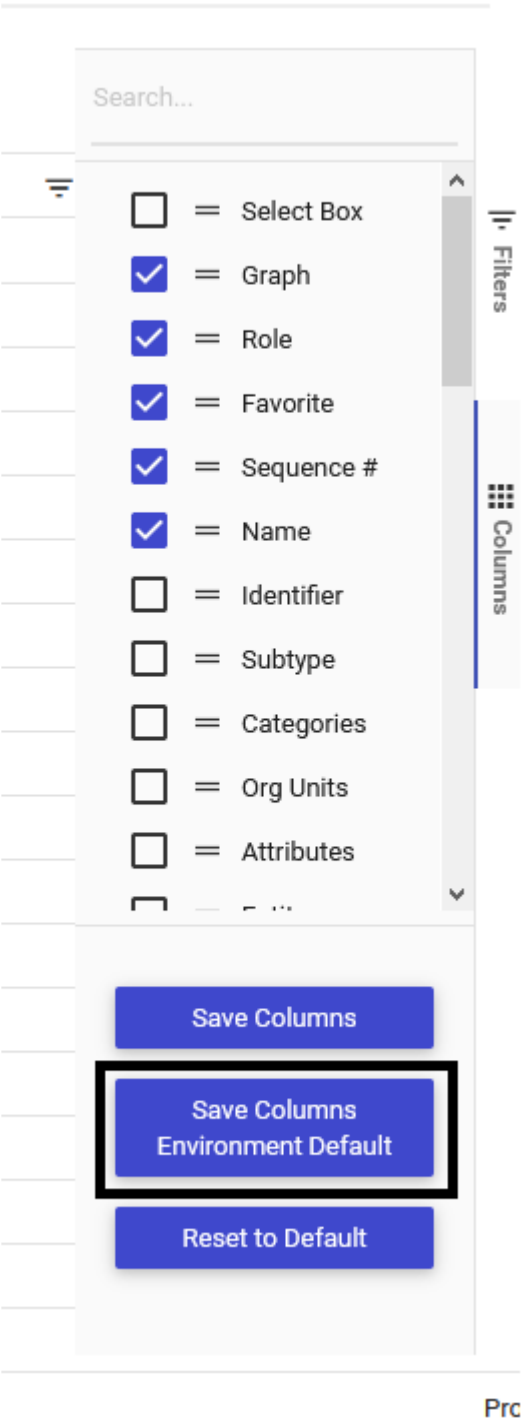
3. Go to any module, for this example we will user the Process Module, and you will be navigated to the List View



4. Go to the column section in the right corner



5. Click on “Save Columns Environment Default “



6. A notification will appear that your changes have been saved as environment default.

Rule
Only an environment or system level admin can see the button “Save Columns as Environment Default
If an environment admin does not set the columns per default, then the columns are set to the system setting
If an environment admin set columns as environment default and after a regular user who has a modified a list

of columns decide to click reset to default, then it will go back to the environment default
If an environment admin set columns in a module to default, then the regular user will need to reset to default to see the changes in that modules
An environment admin user can also modify the order of the columns, add & remove columns before saving it as environment default
Filters on columns will not be saved
If a environment or system admin clicks “Reset to Default” it will always reset back to system default instead of environment default

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.

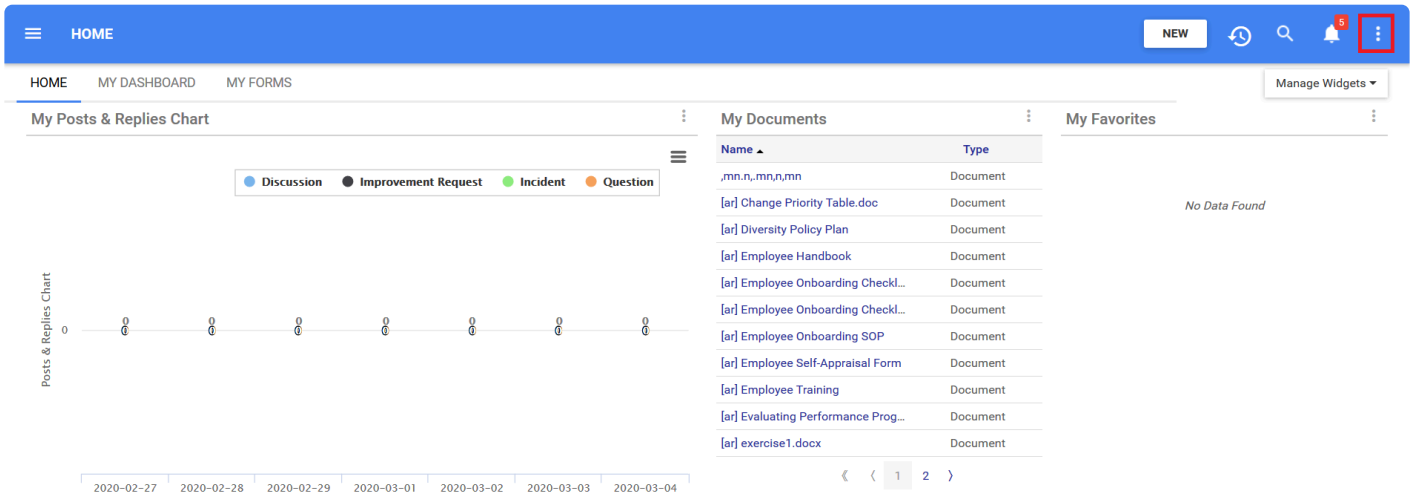
To assure that System Administrators can oversee and maintain the EPC effectively, they are provided with a variety of responsibilities which can be classified as follows:

1. General
2. Environment
3. Users
4. Groups
5. Search
6. Language
7. Risk
8. Attributes
9. Advanced

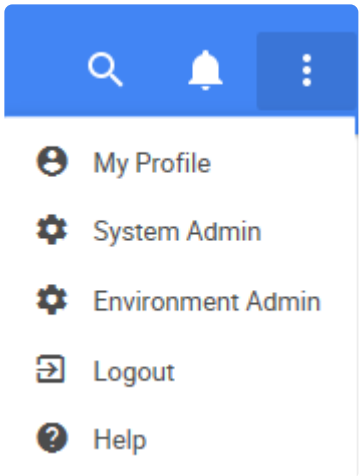
To Navigate to the System Administrator section, please see the steps below:

1. Login to the EPC

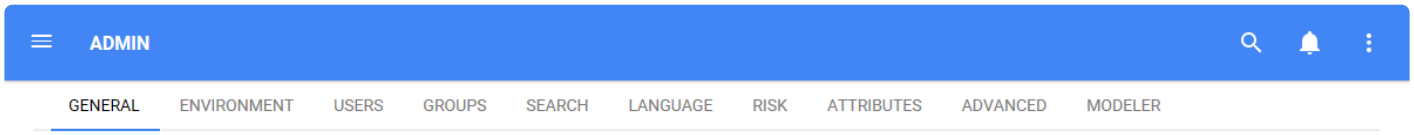
2. On the Home page, navigate your cursor to the icon



3. Select the icon and it will generate a drop-down menu



4. Select System Admin option and you will be navigated to the “General” section



10.1 General

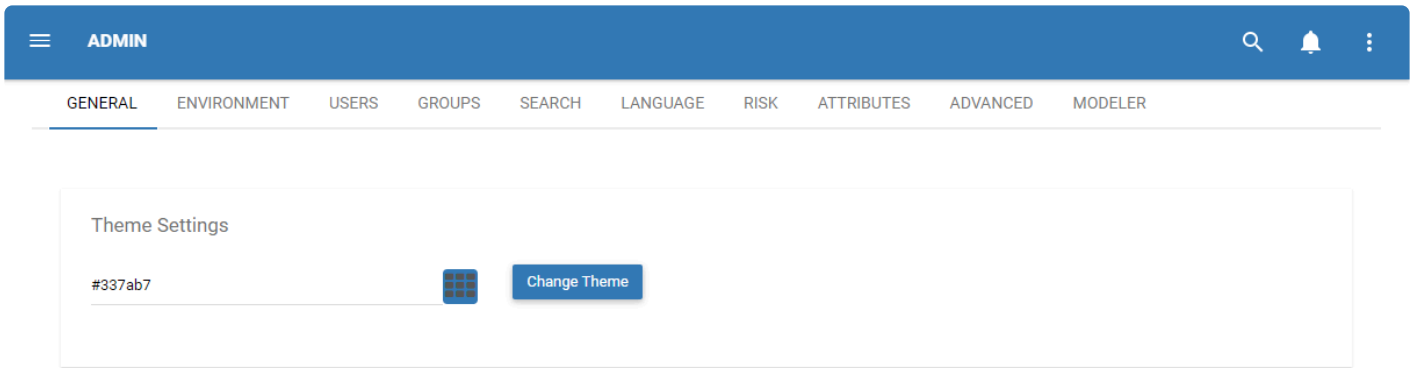
The General tab in the System Admin has three sections

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

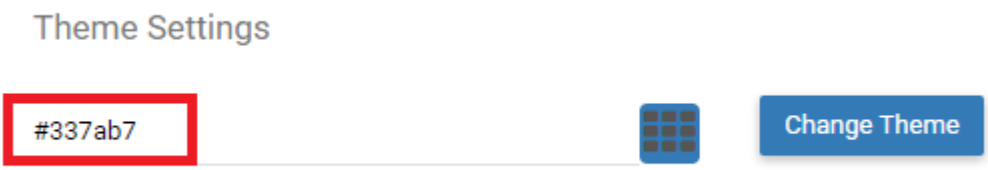
10.1.1 Theme Settings

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.



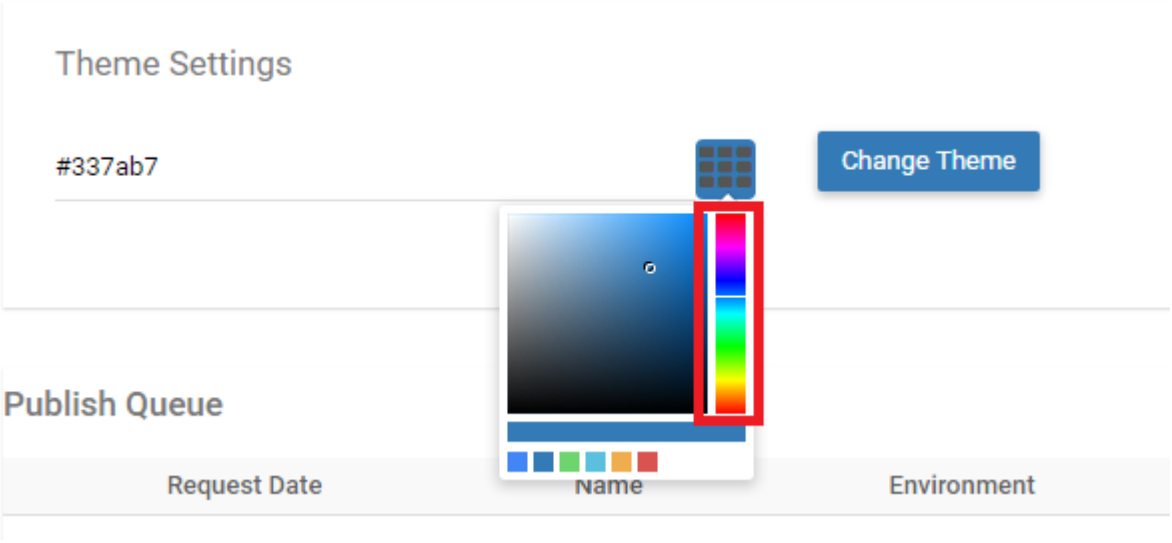
Please see the following instructions to change the color of your EPC Web App

1. Navigate to the “System Admin” section of the EPC

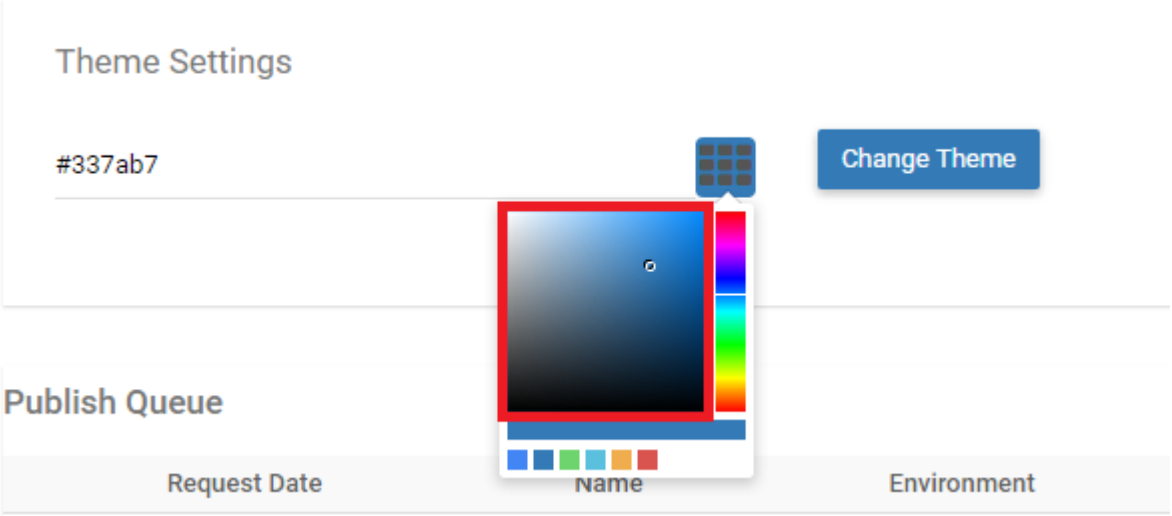
2. Select the icon

3. It will generate a drop-down menu featuring a color select window

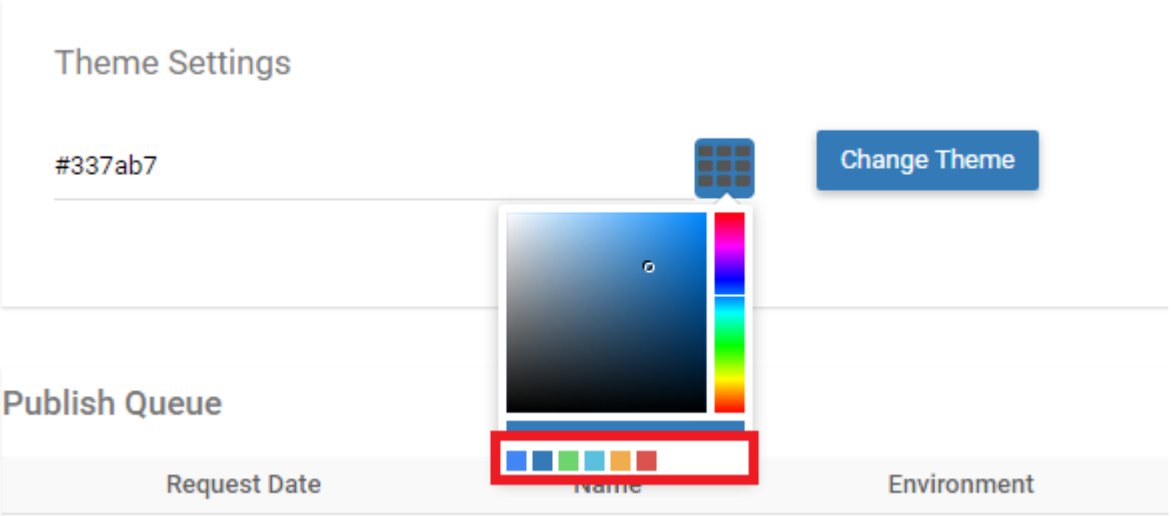
4. Users can select between the color bar a), shade b) and from c) preset colors by clicking on their desired selection



a)

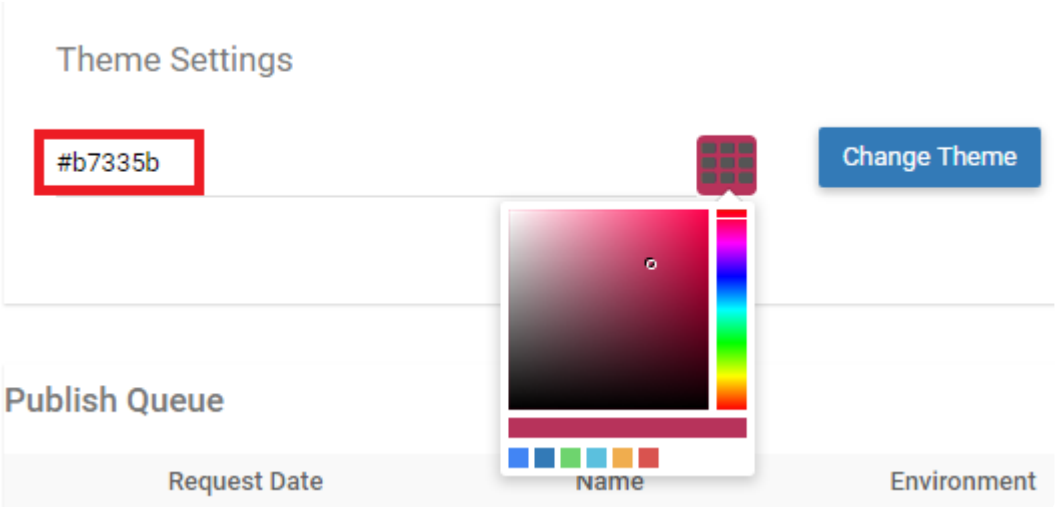


b)

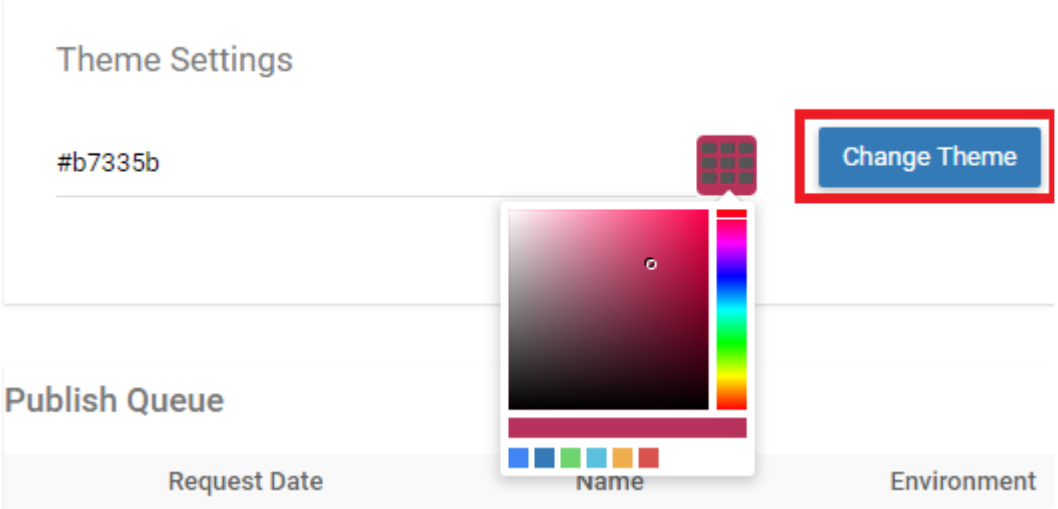


c)

5. Select to color you desire. It will enter a new alphanumeric code in the text box.



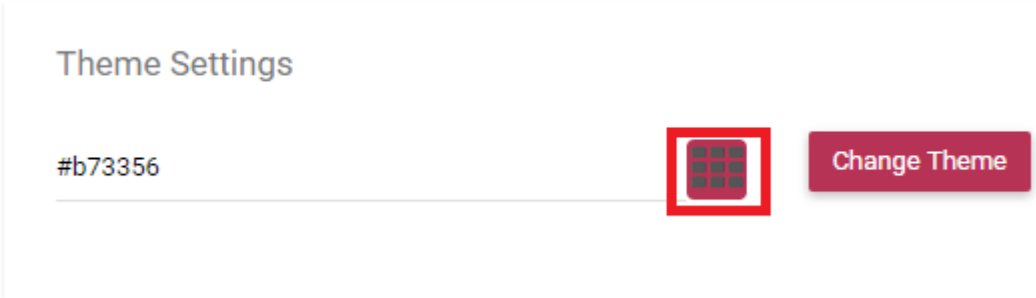
6. Select the “Roll Theme” button to apply the theme



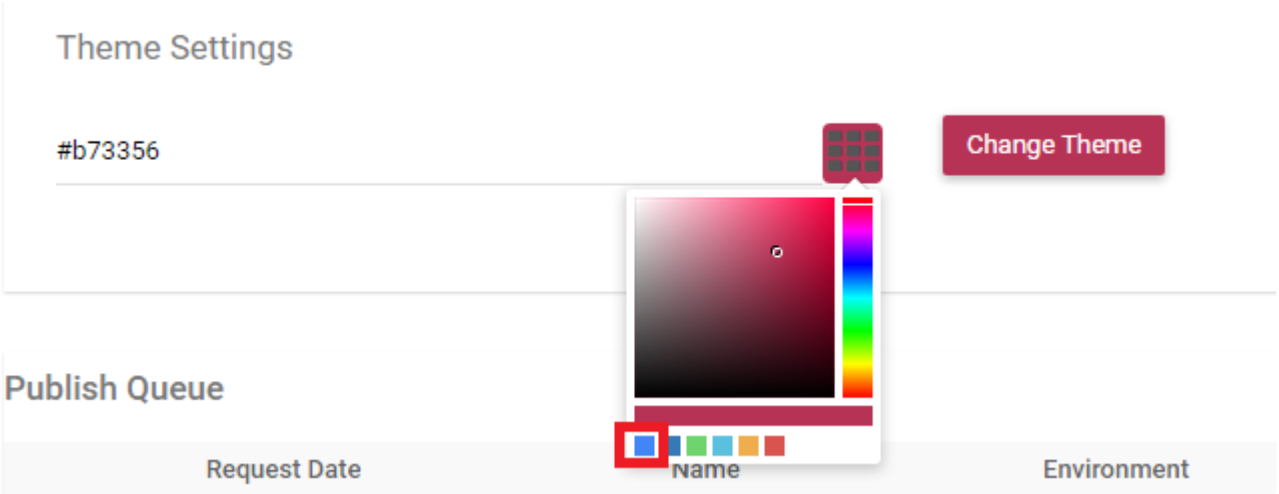
7. The page will be reloaded and the new theme will be applied

To revert back to a present or default color, you can:

i. Select the following icon



ii. Select the default color from the “Recent Color” bar



iii. Enter in the default Hex code – **#2196f3** to get the EPC default color

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 where 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

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 ›

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

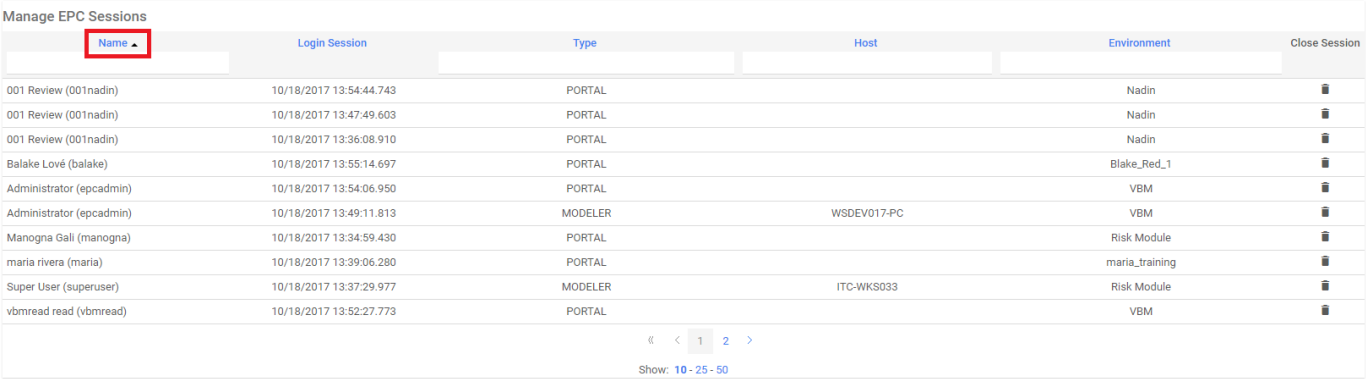
3. Scroll down to the Manage EPC Session section and click on the **Category**

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”.



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:

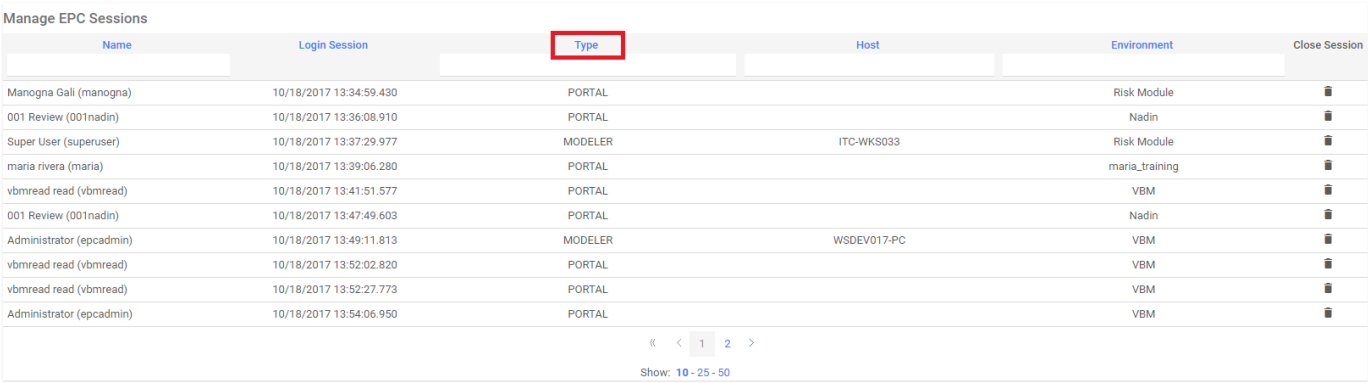
1. How to Add Filters
2. How to Remove Filters
3. How to Combine Filters

10.1.3.2.1 Add Filter

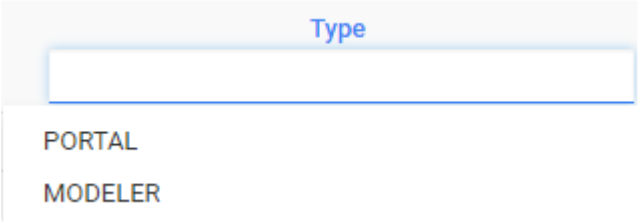
You can add filters to see the items of your choice. **Type** what you are looking for, or **select** the filter in the drop-down menu.

How to Add Filter

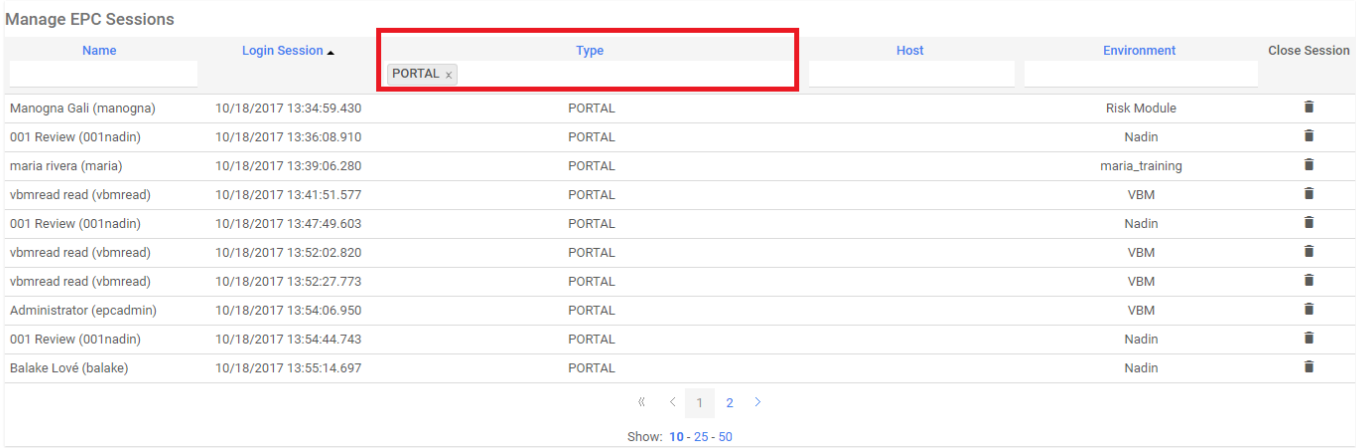
1. Navigate cursor and select the box column you wish to filter. For this example, we will use **Type.**



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



3. Select the desired filter. For this example, we will select **Portal**

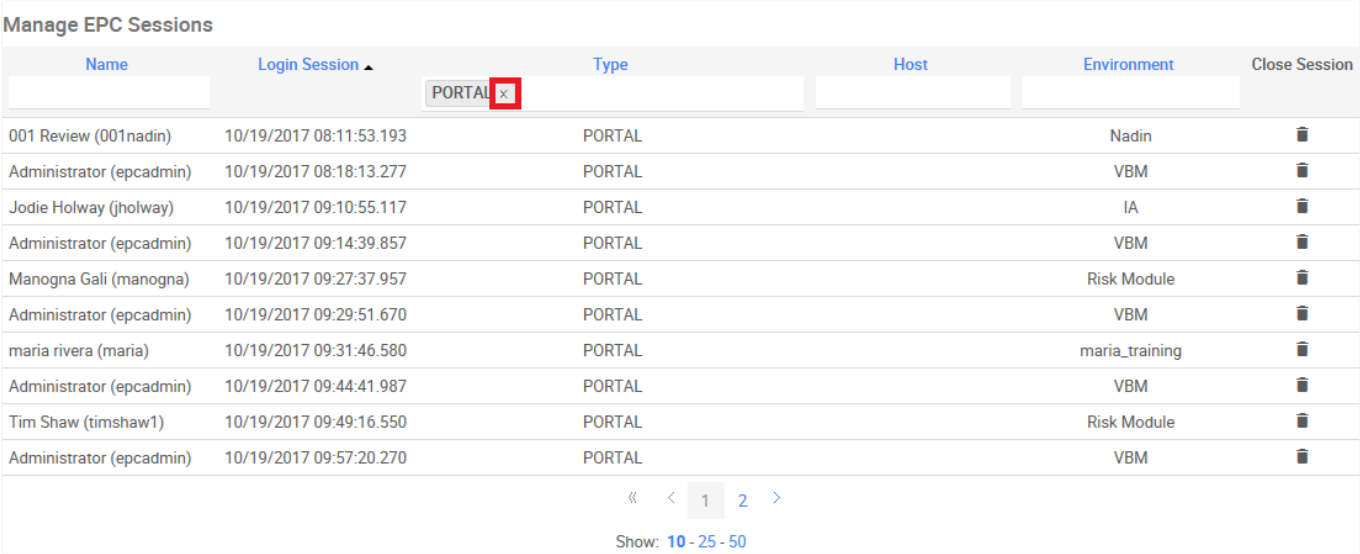


10.1.3.2.2 Remove Filter

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.



10.1.3.2.3 Combine Filter

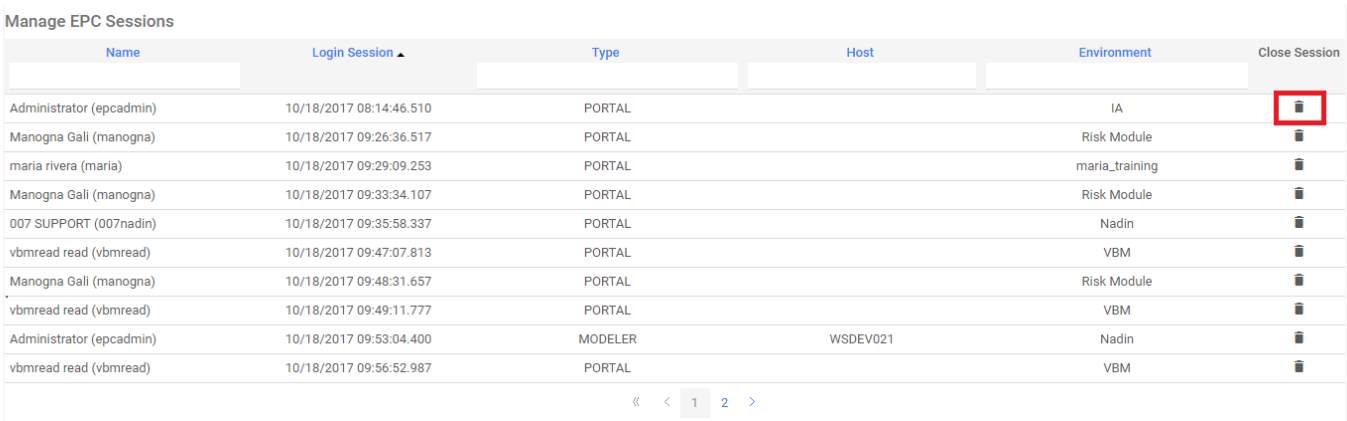
You can combine filters, meaning you can add any other column filter to isolate results. See above to see how to add filters.

10.1.3.3 Closing

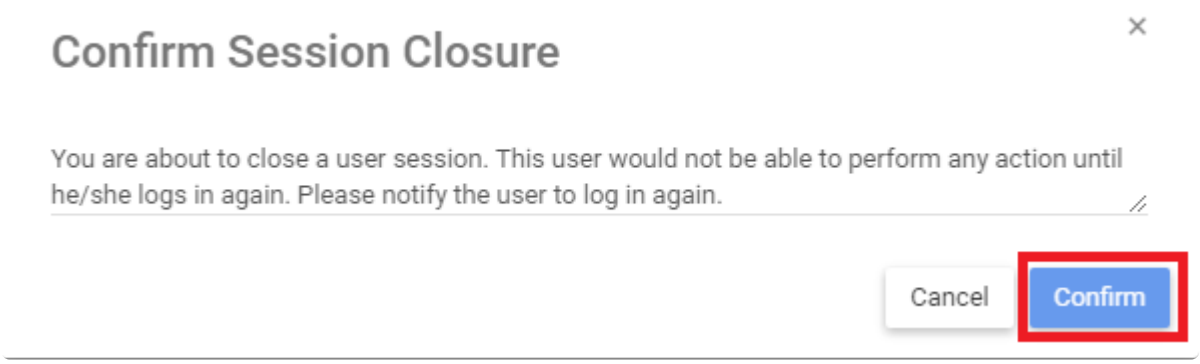
System Admins can **close** any EPC opened session. By closing a session, the user logged in to the session has no longer access to use the EPC. In order to regain access, they have to log back into the EPC with their respected credentials.

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 where left opened to allow User 11 to log in into EPC.

1. To close an EPC session, select this icon



2. The “Confirm Session Closure” message will appear. Select “Confirm” to close the session.



10.1.4 Default Environment

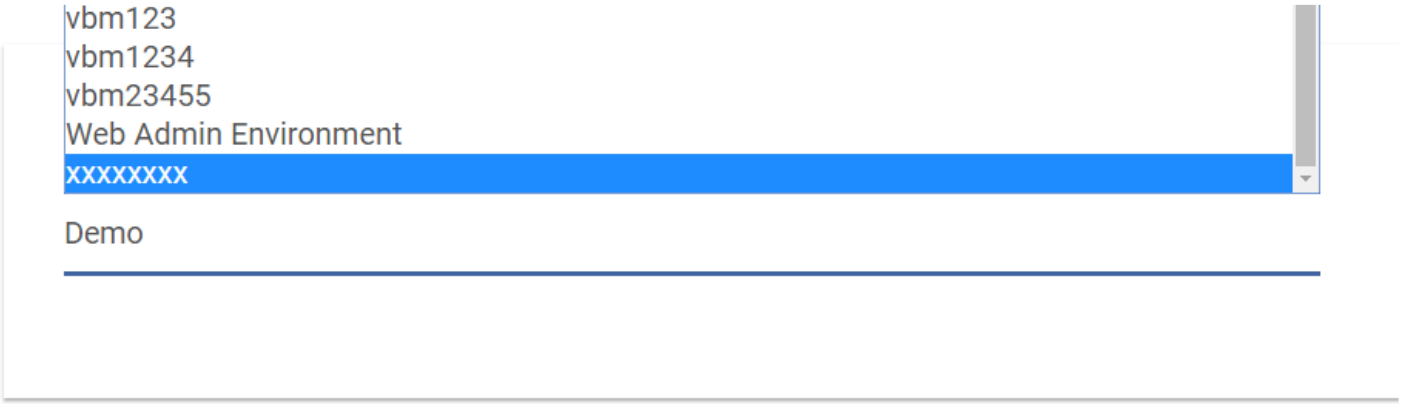
EPC Administrators have the ability to set a Default Environment for all users. When a default environment is set, any user who logs in for the first time will be logged into that environment.

> NOTE: The default environment is only for the initial login. If an user switches environment, the user's environment will not revert back to the default environment unless the user switches the environment him/herself.

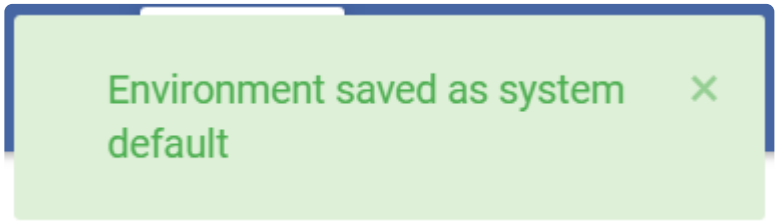
To set a default environment

1. Navigate to the Default Environment box

2. Select a default environment

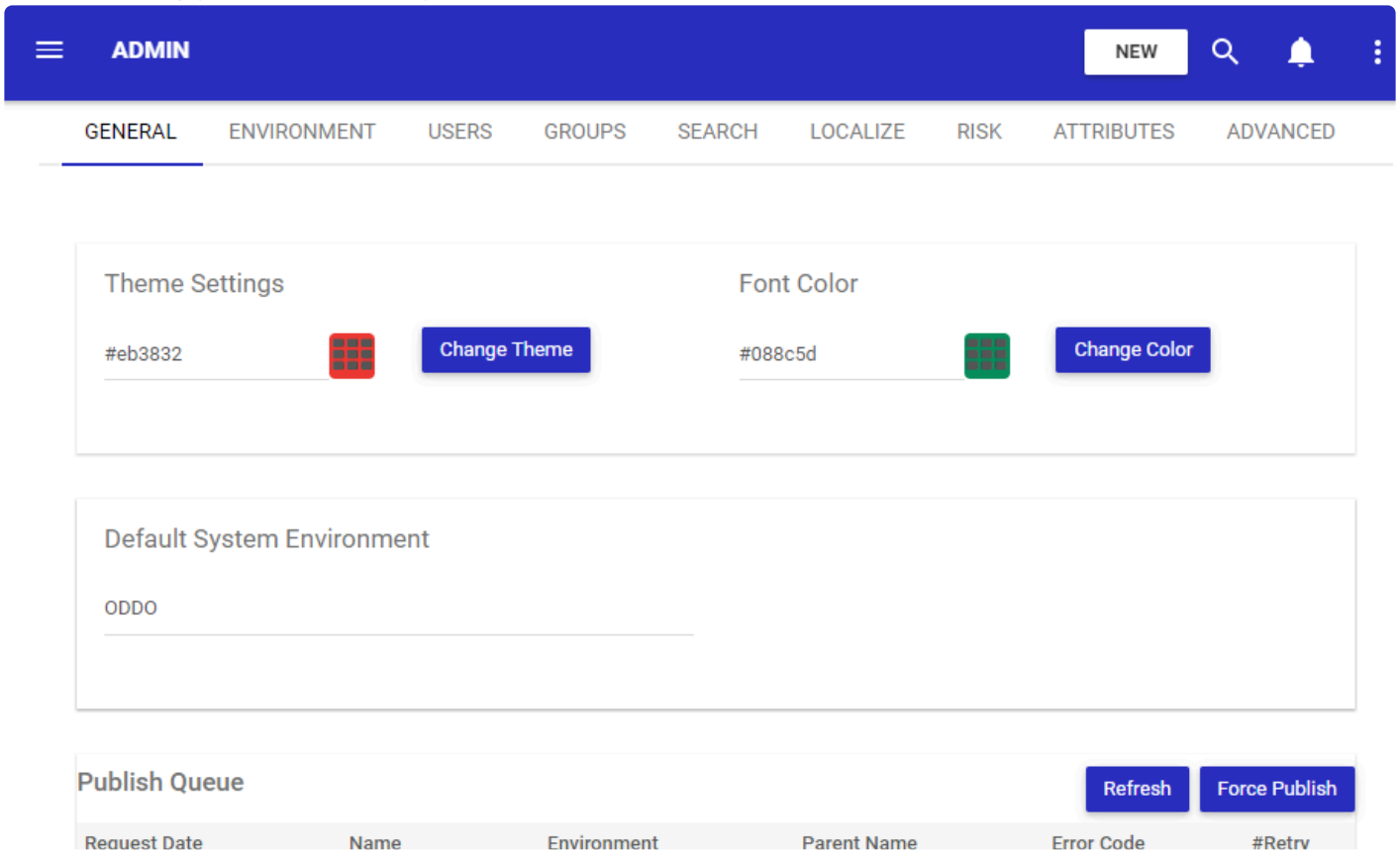


3. The default environment will be saved and you will see a confirmation message.



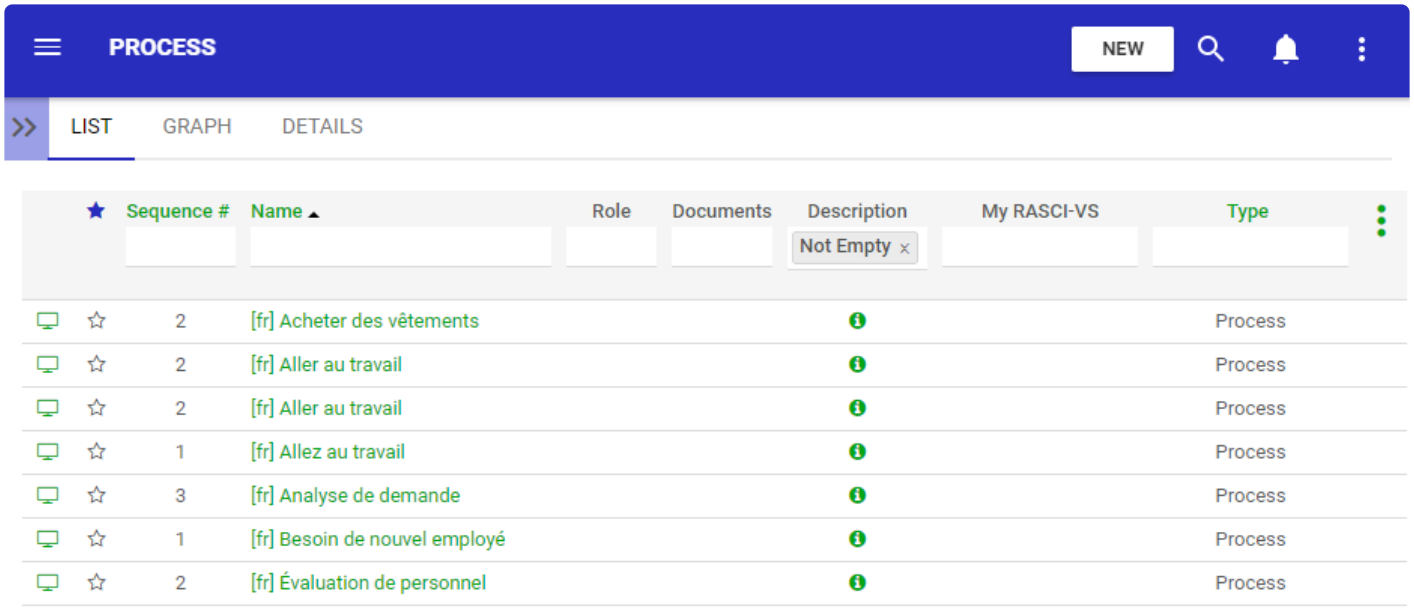
10.1.5 Default Font Color (System)

Within your system administrator page, you can now customize the default hyperlink font color across the application. Along with the theme color selection, you can use a similar image selector to define hyperlink color, allowing you to customize your tool.



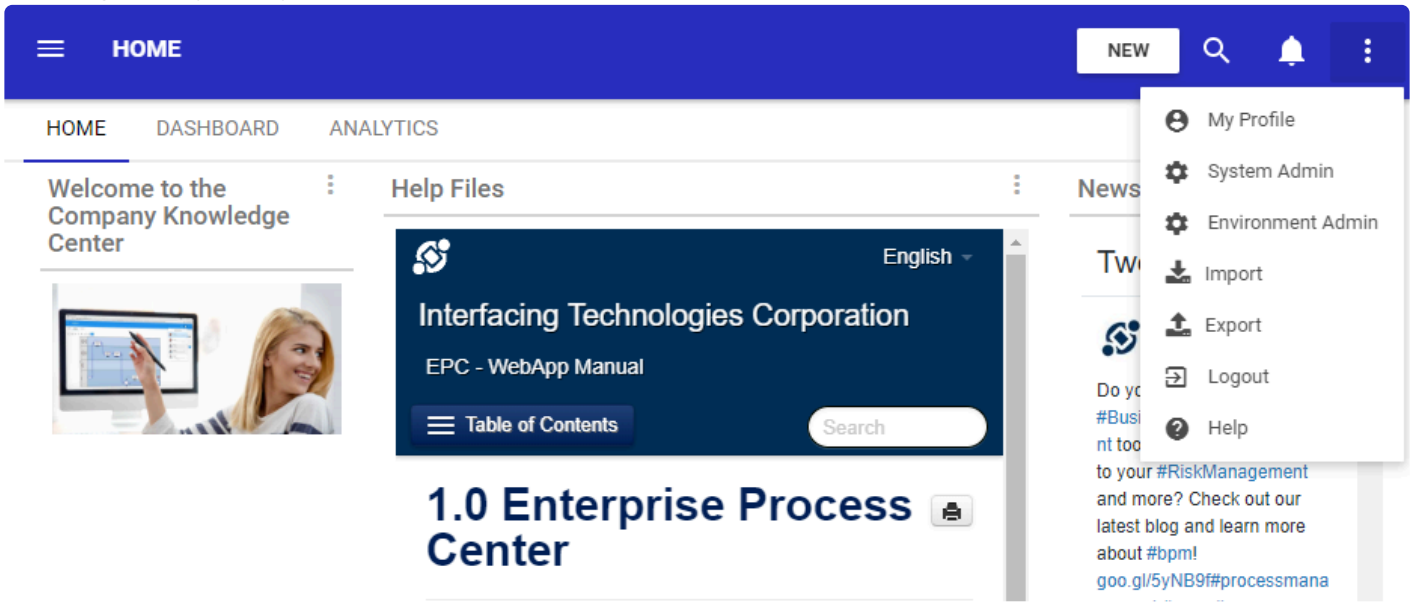
Selecting a new font color will allow you to change hyperlinks available on:

- Home Pages
- List Views
- Details Page



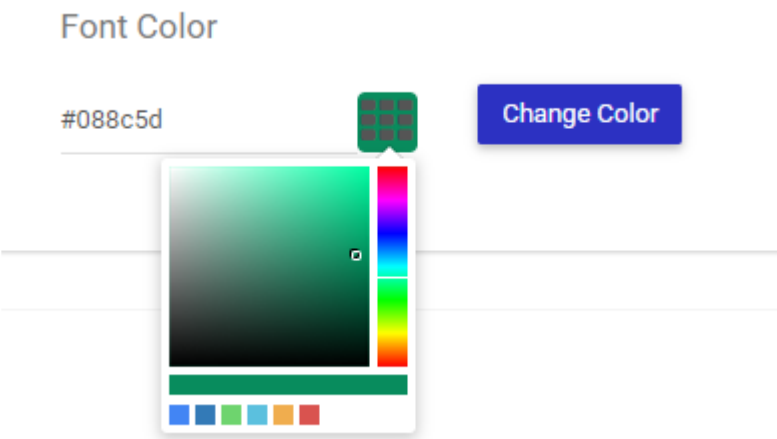
To change the default font color:

1) Navigate to your System Administrator – General Tab

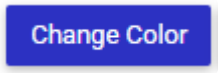


2) To change the color

a) Type in your desire color code b) click on the color selector



3) Once you have selected the color, click on the ‘Change Font’ button

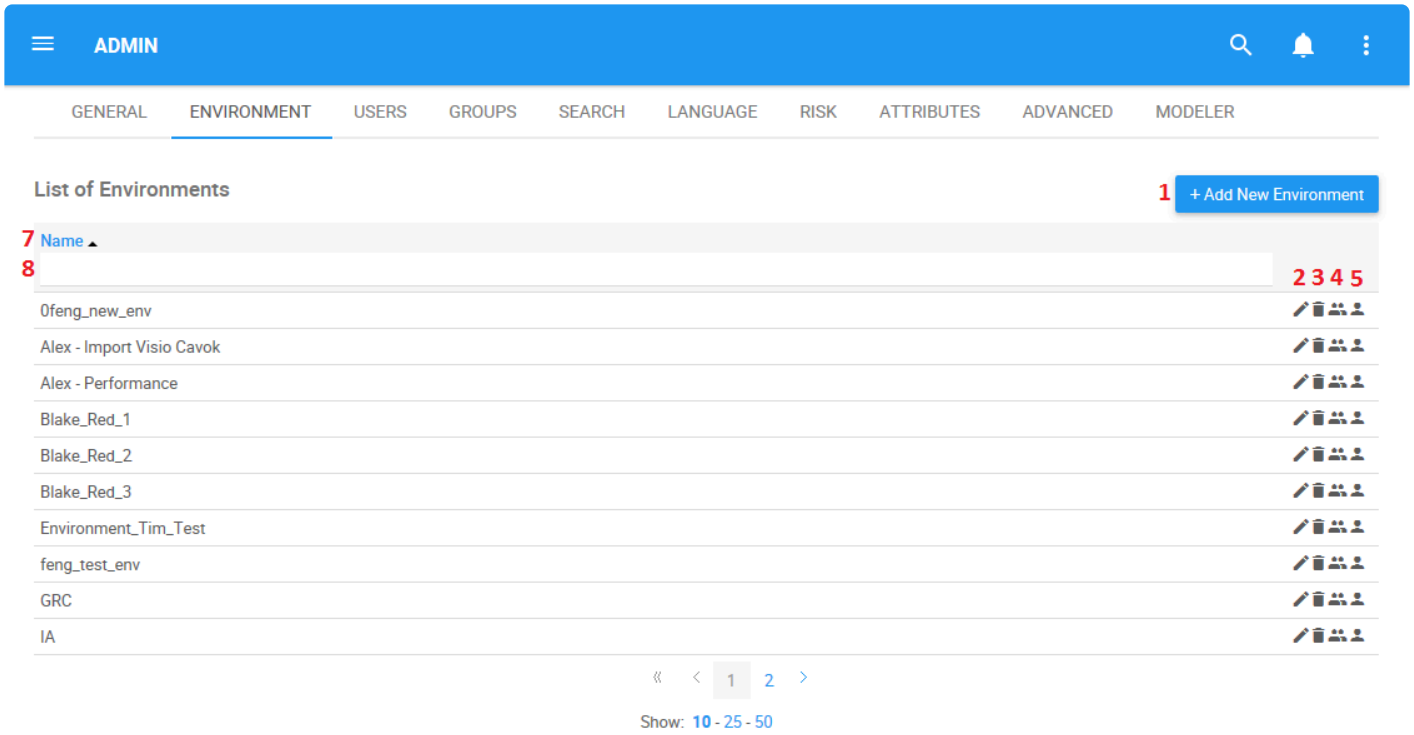


10.2 Environment

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



10.2.1 Add Environment

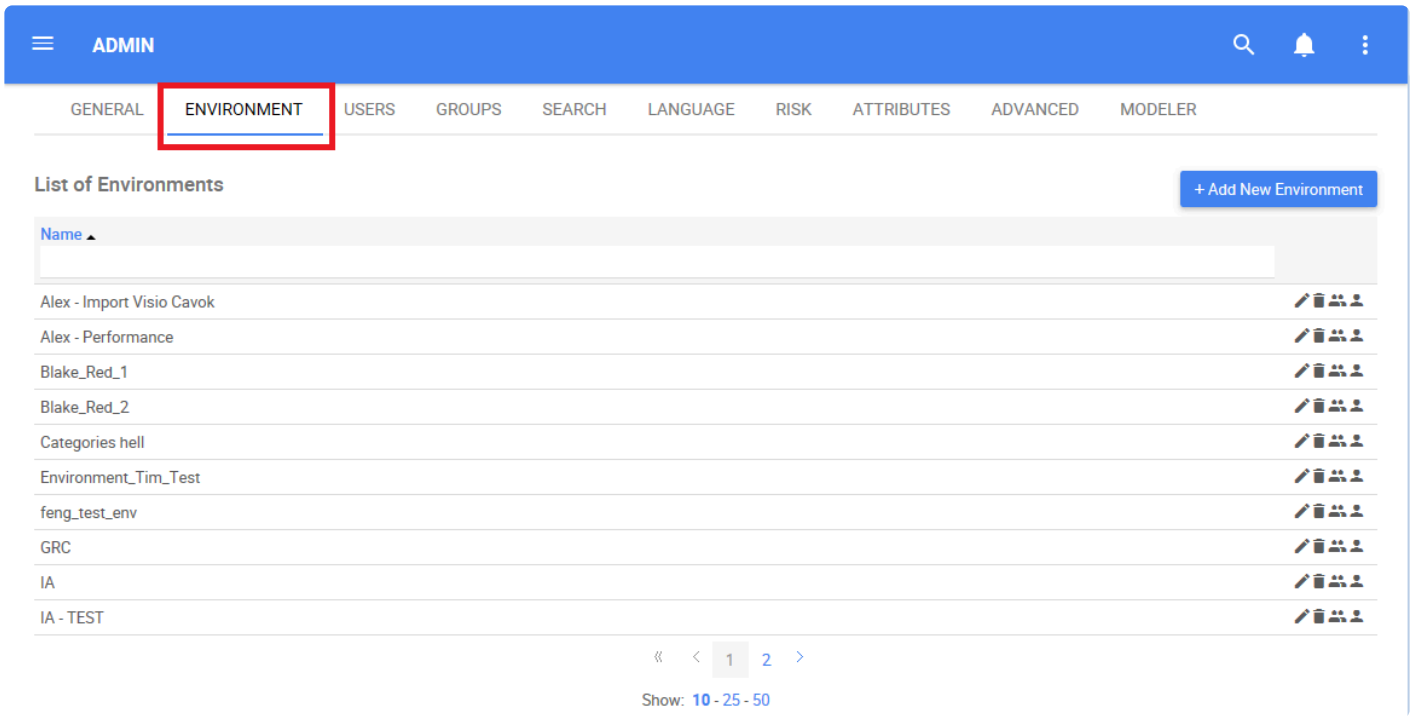
Under the Environment tab, System Admins are responsible to create environments.

How to Add an Environment

1. Login to the EPC

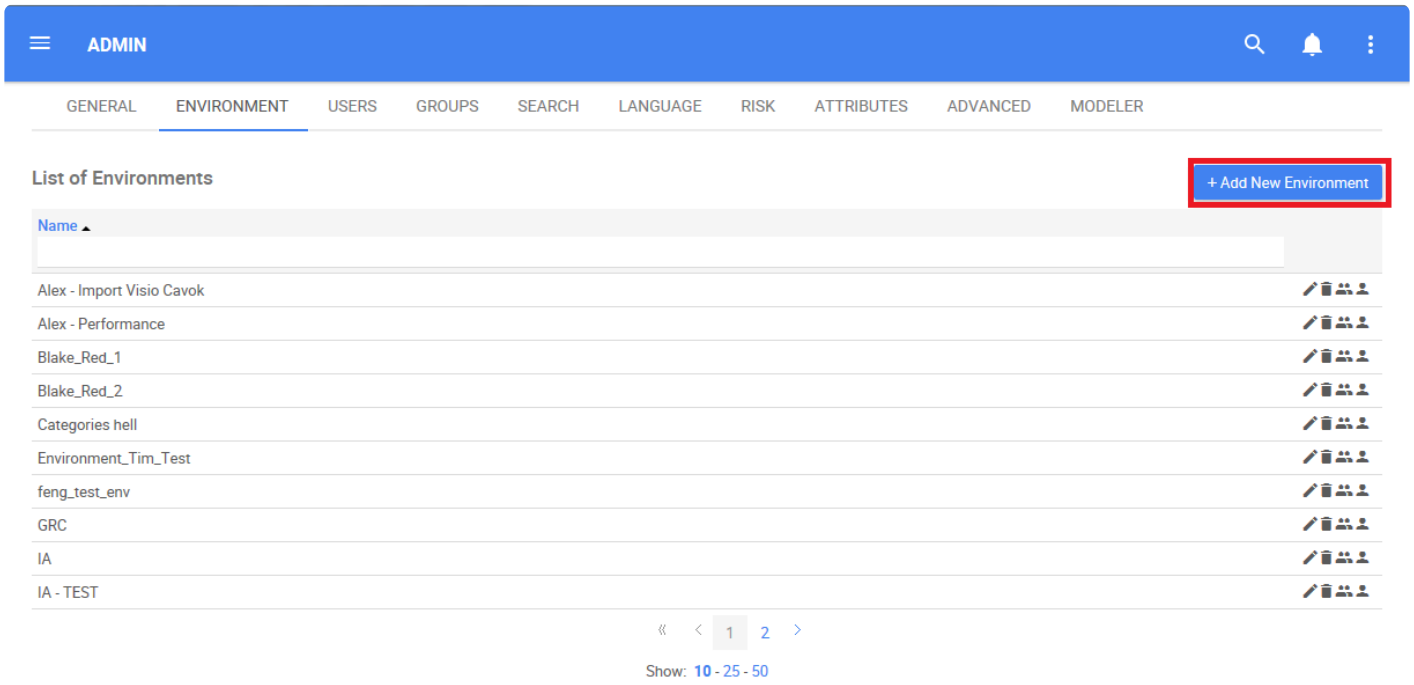
2. Navigate to the System Admin Section

3. Select the Environment tab within the System Admin Section. You will be navigated to the Environment management page.



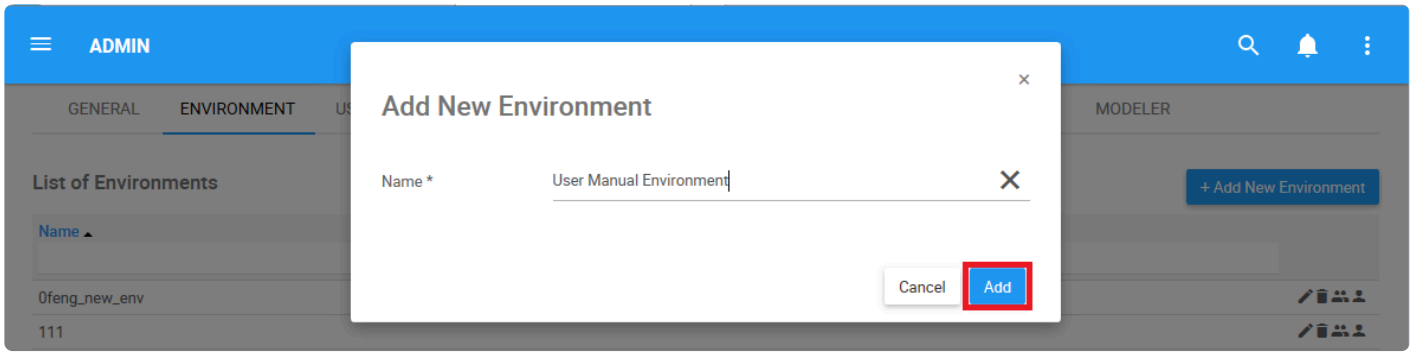
4. Navigate the cursor and select the

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

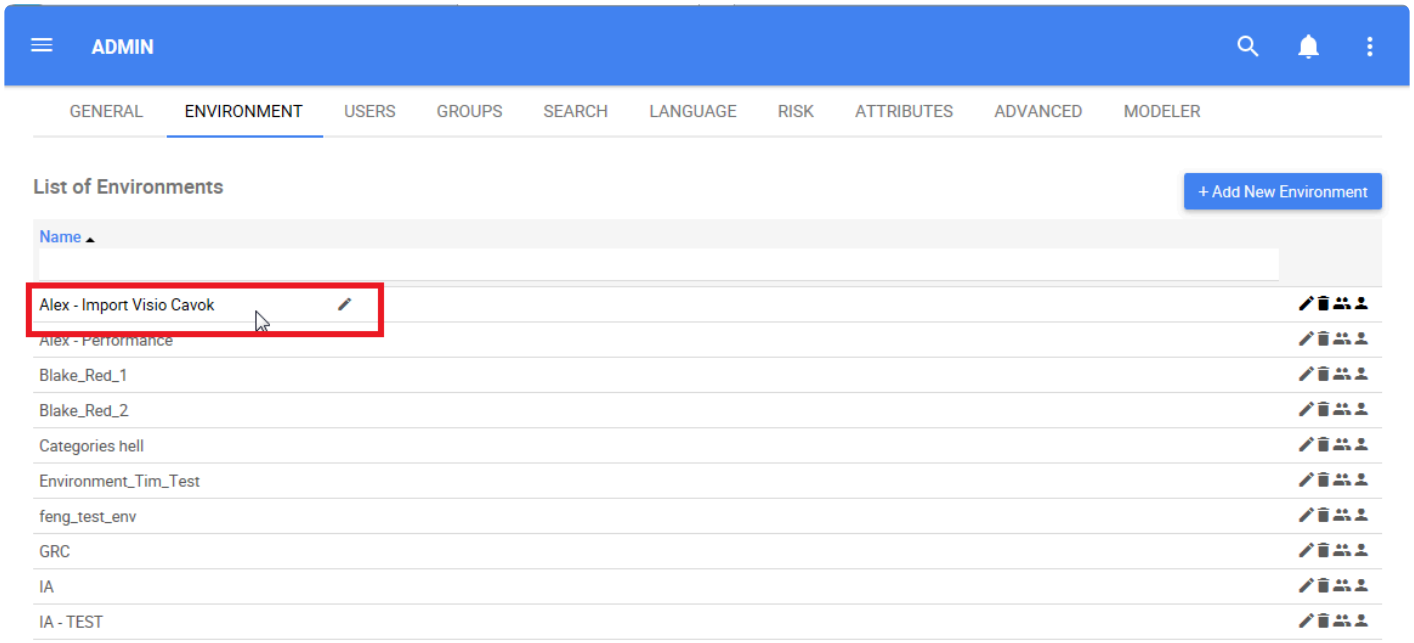


10.2.2 Edit Existing Environment

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.

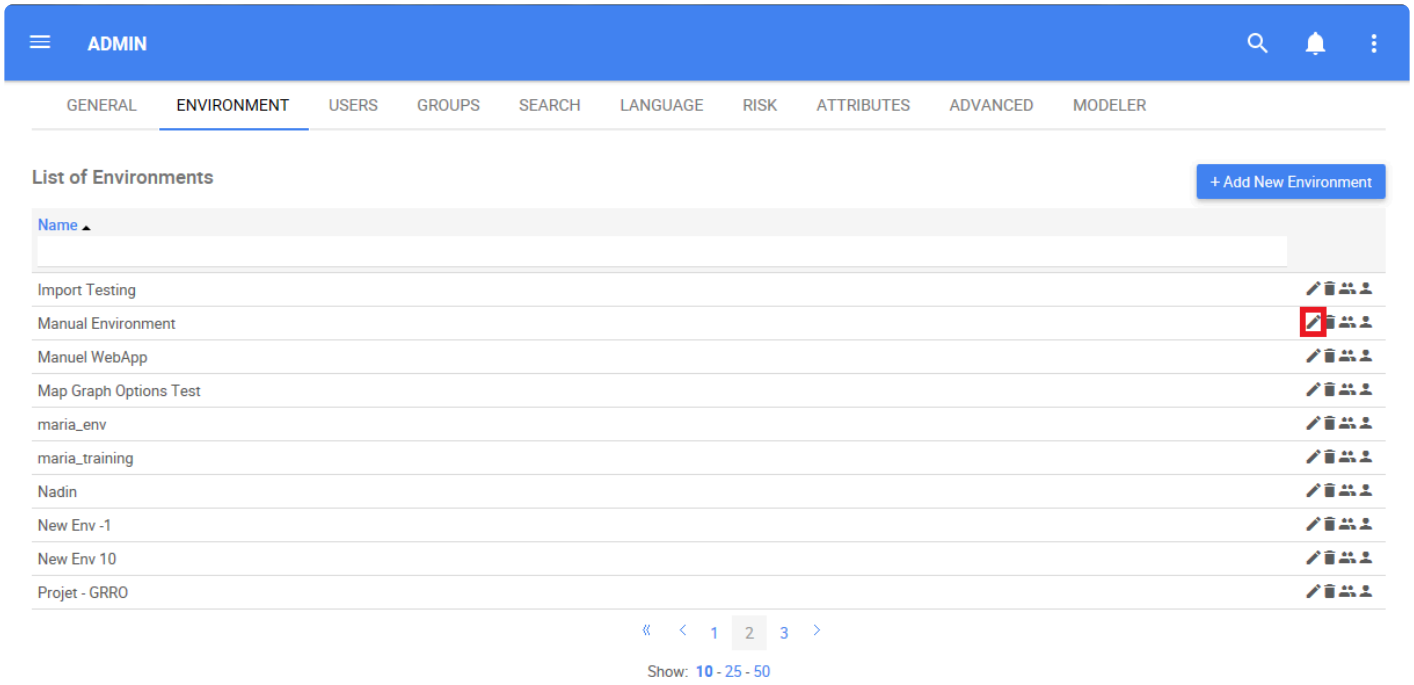
In-Line Editing

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.

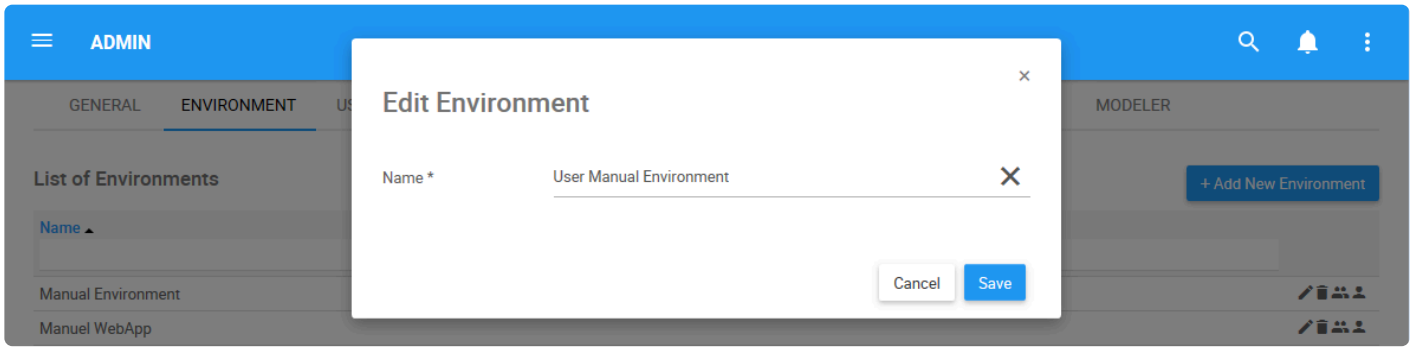


Editing Window

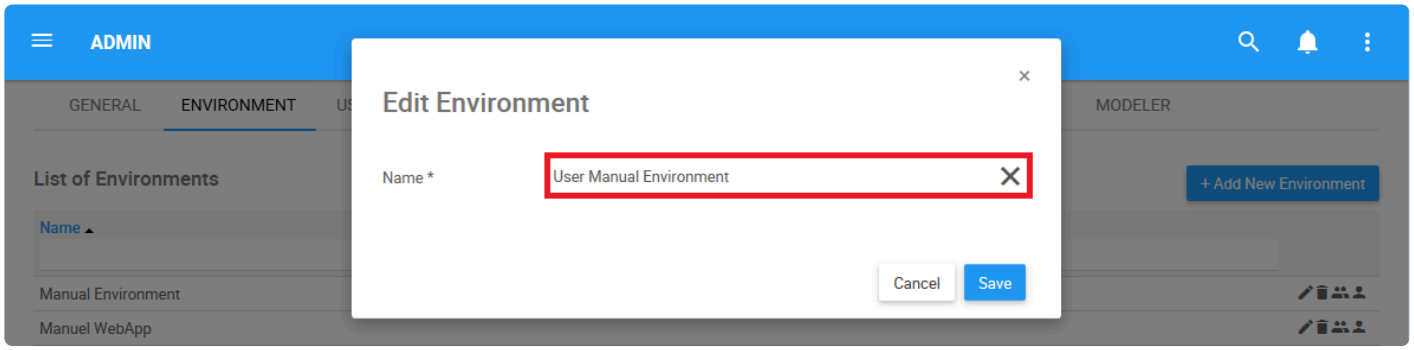
1. For further editing capabilities, navigate the cursor and select the icon for the environment you want to edit



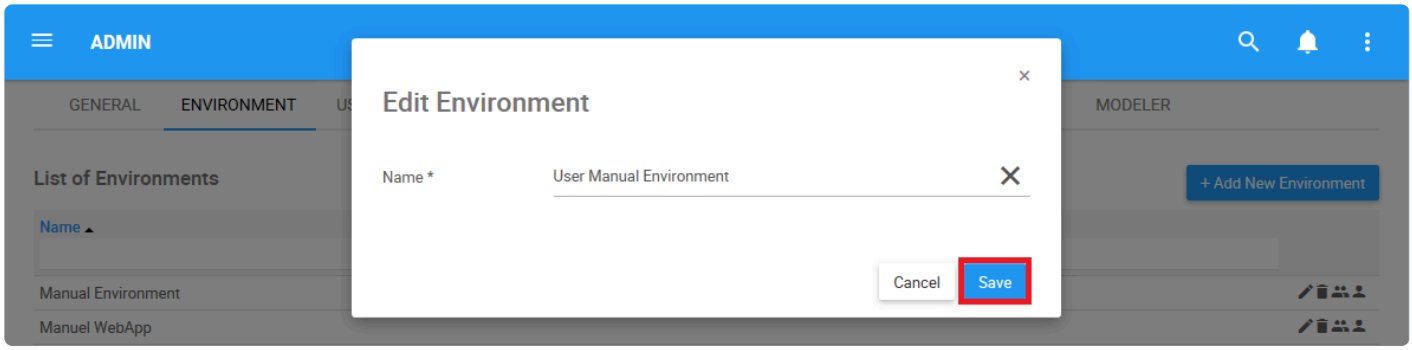
2. The following box will pop-up



3. Click on the “Name box” and edit the name of the environment



4. Select the “Save” button to confirm changes

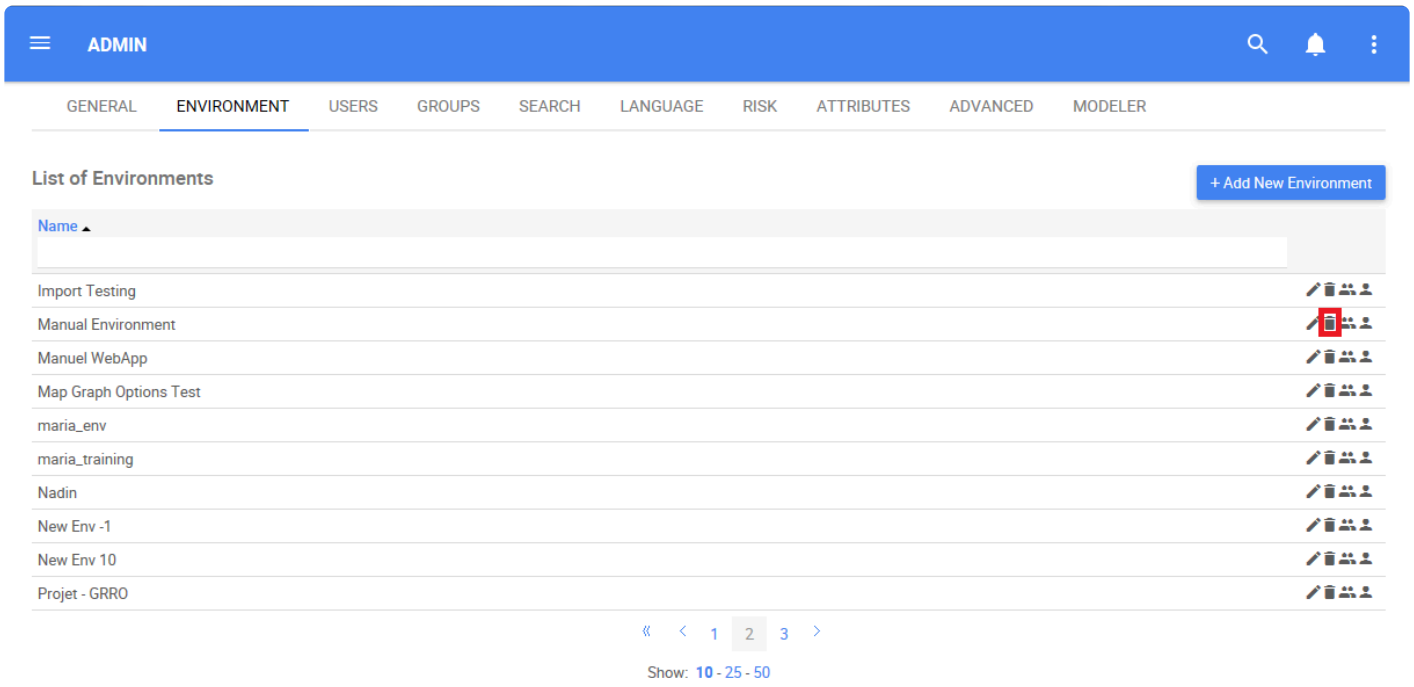

ADMIN
GENERAL
ENVIRONMENT
MODELER
List of Environments
+ Add New Environment
Name
Manual Environment
Manuel WebApp
Edit Environment
Name *
User Manual Environment
Cancel
Save

10.2.3 Delete Environment

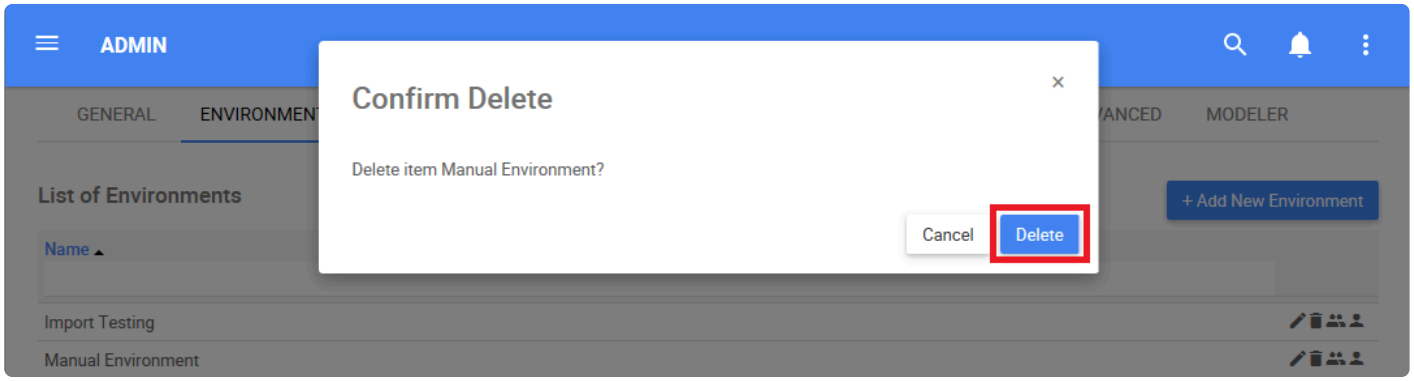
Under the Environment tab, System Admins can delete environments.

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

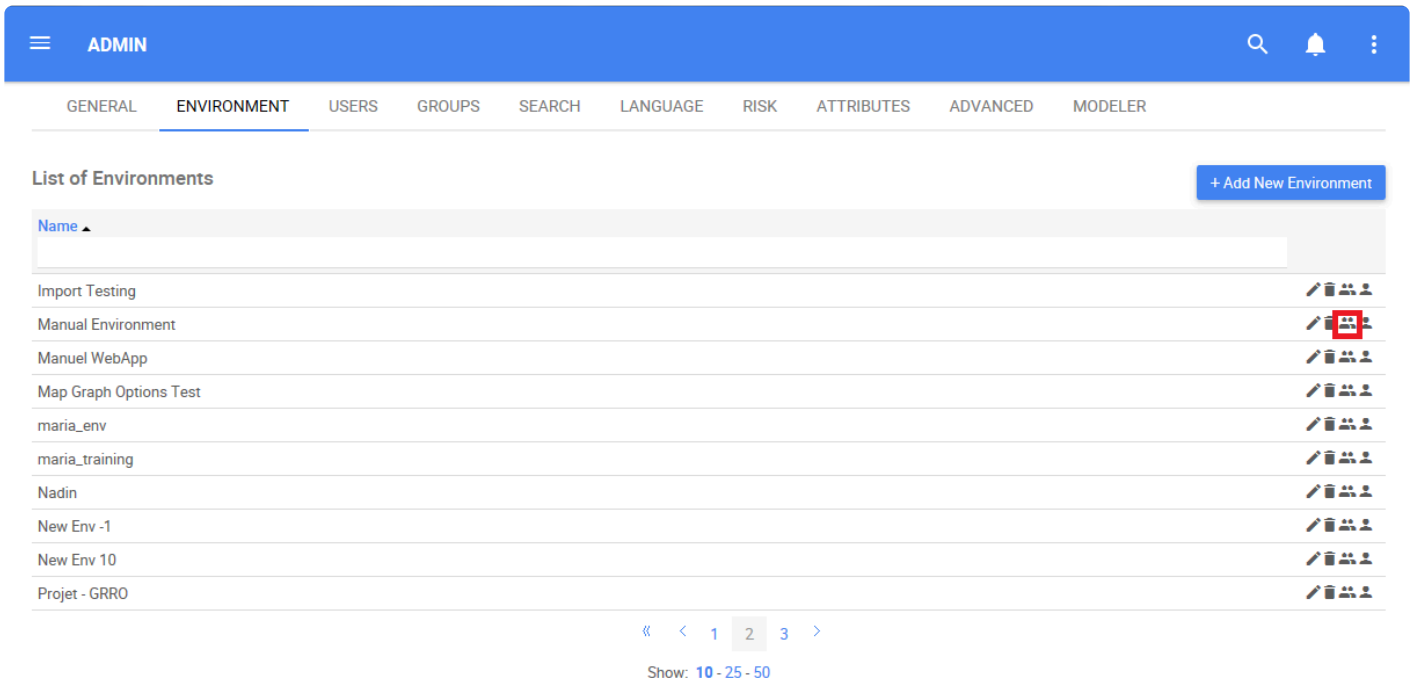
Under the Environment tab, System Admins can add Groups to environments. Groups can be used by System Admins to create classifications to provide variable access and different layers of security, where only the users added to the group can access the information.

> All deny access' on an environment override any other permission awarded on a group.

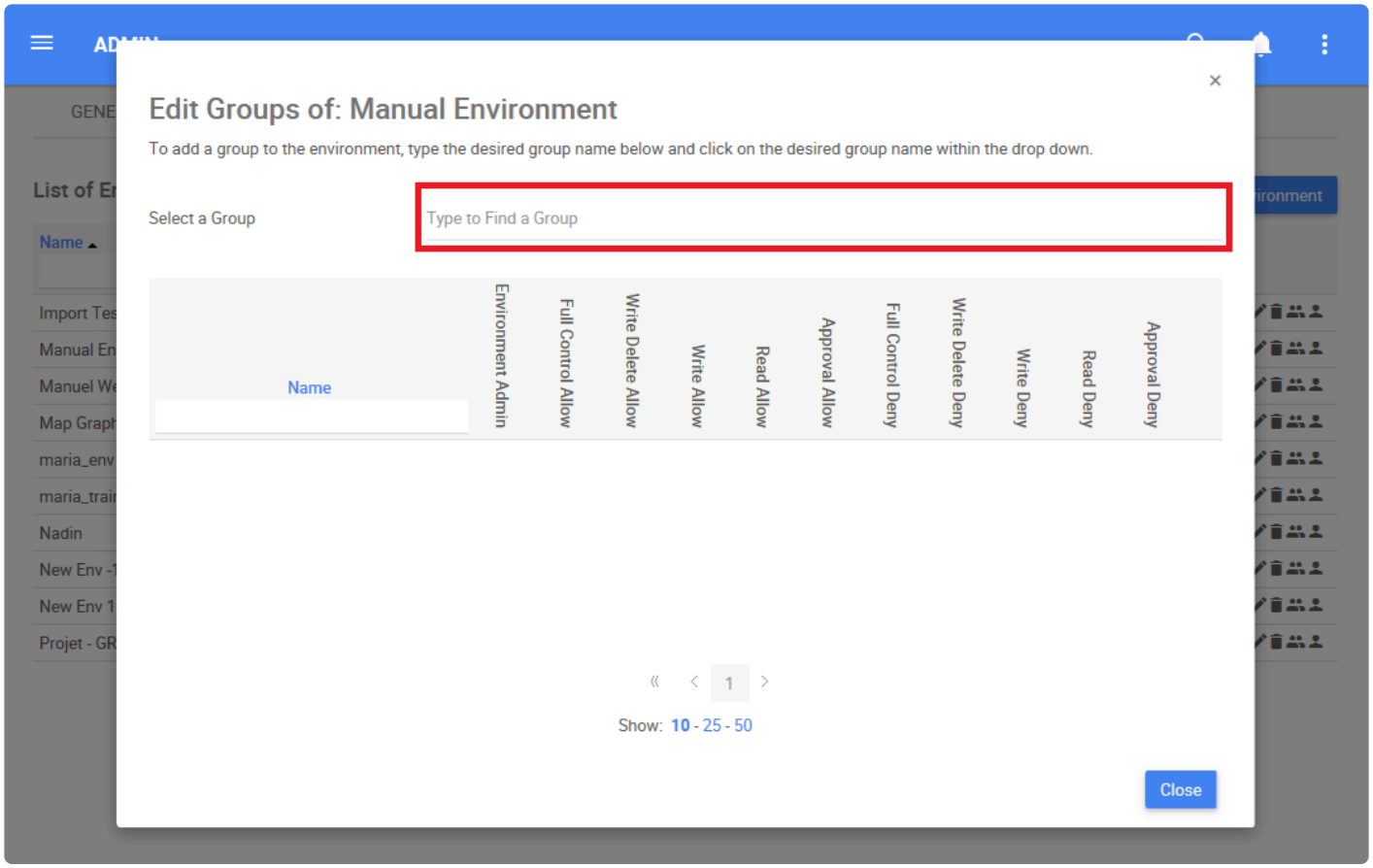
. All deny access' on an environment override any other permission awarded on a group.

How to Add a Group to an Environment

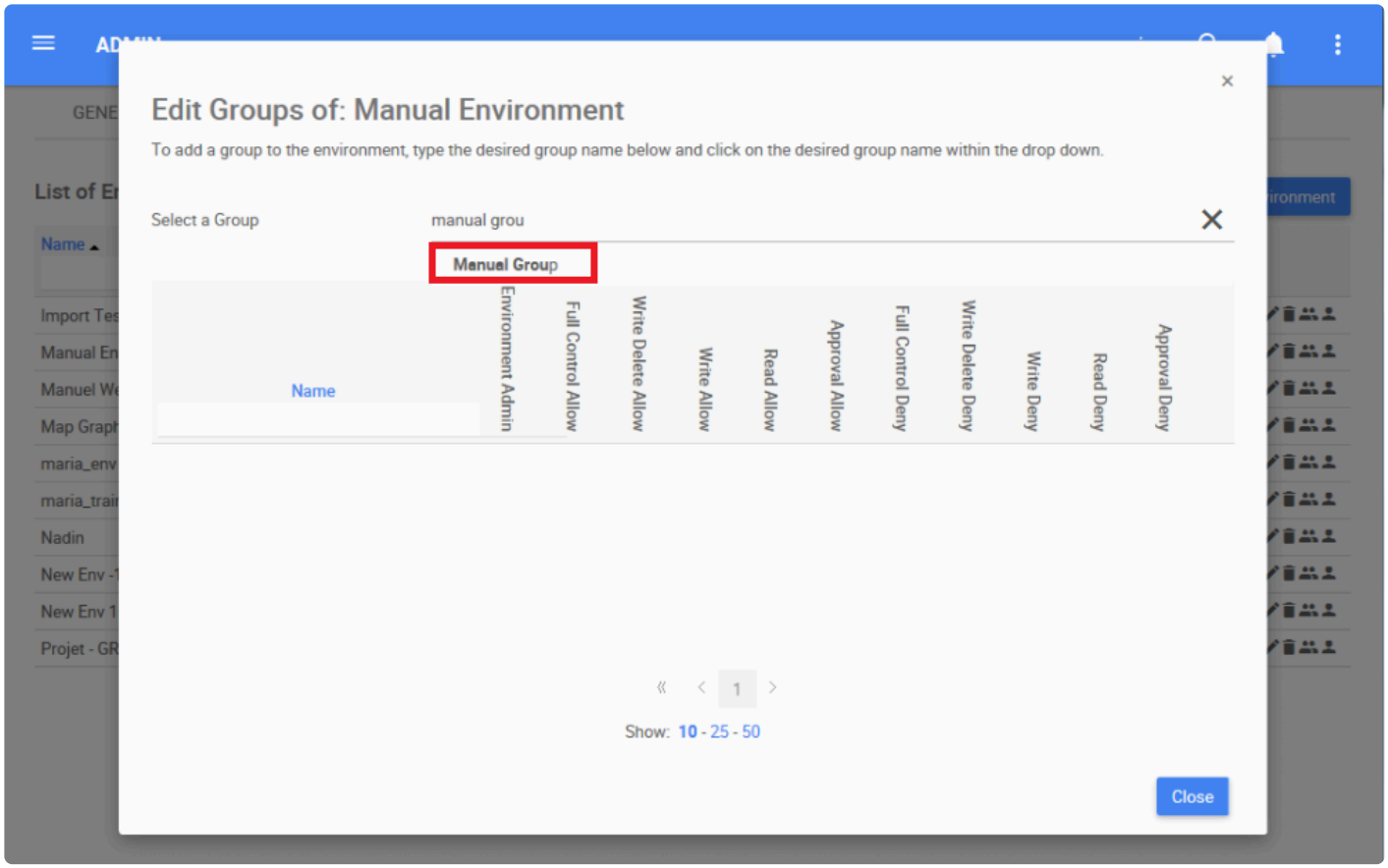
1. Navigate the cursor and select the icon for the environment you want to add a group to



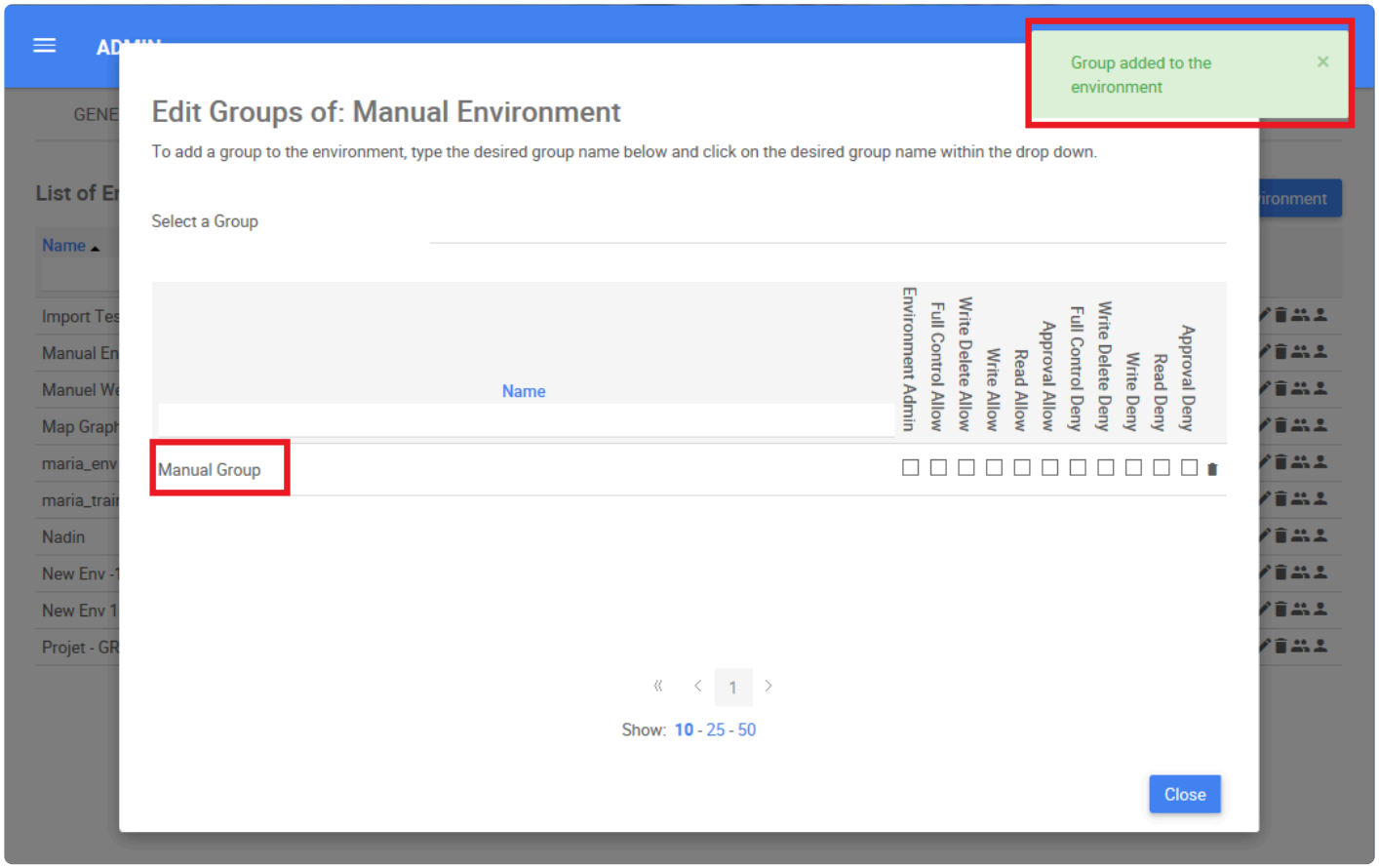
2. Navigate to the "Select a Group" search box
p(banner tip). The list of groups will populate below based on key word typing



3. Type the name of the Group you want to add to the environment. “Double Click” on the group to finish adding it

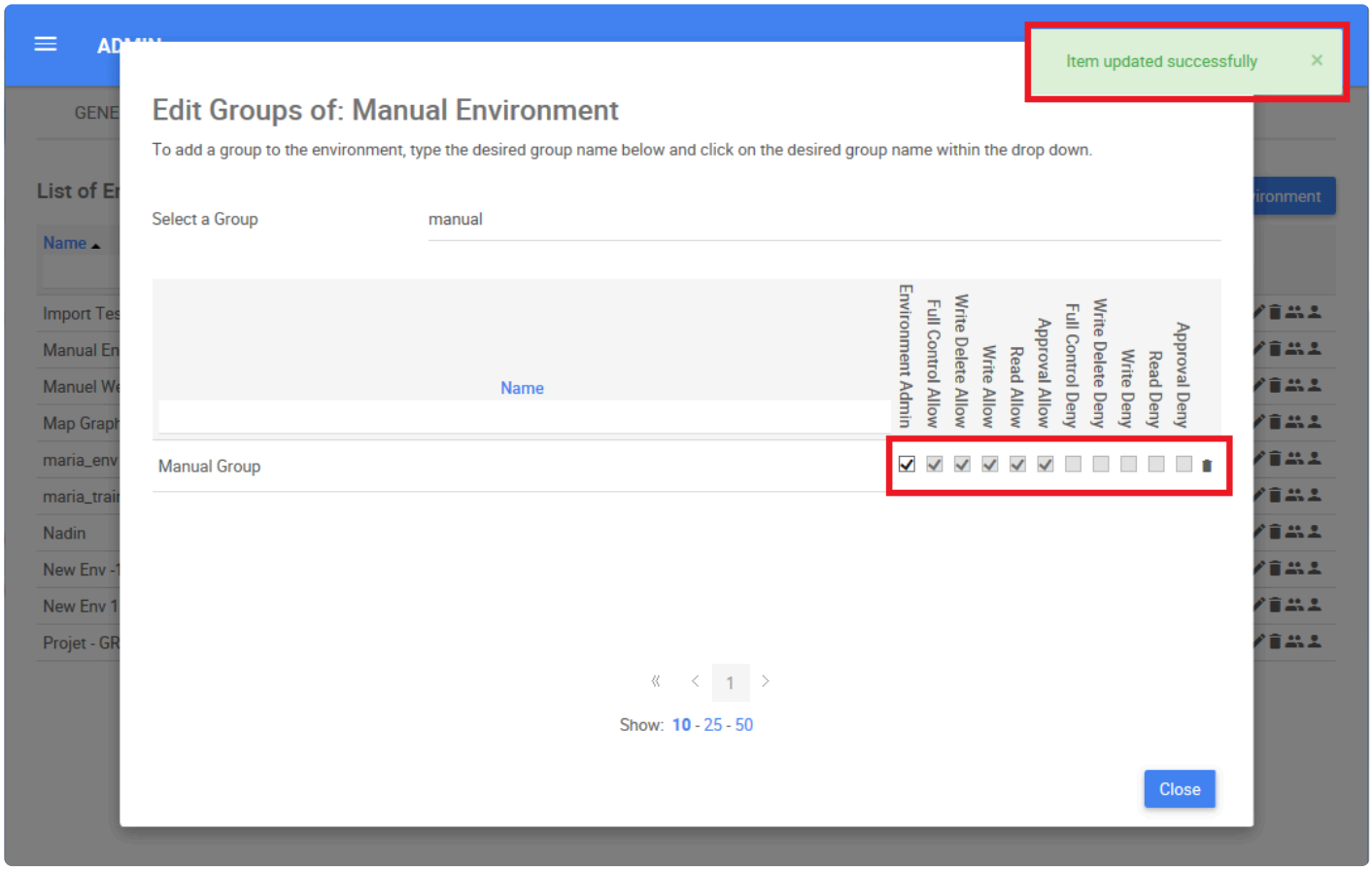


4. The added group will appear on the following table. The system admin will receive an automatic notification when the group is successfully added
p(banner important). This process may take a minute or two to be completed



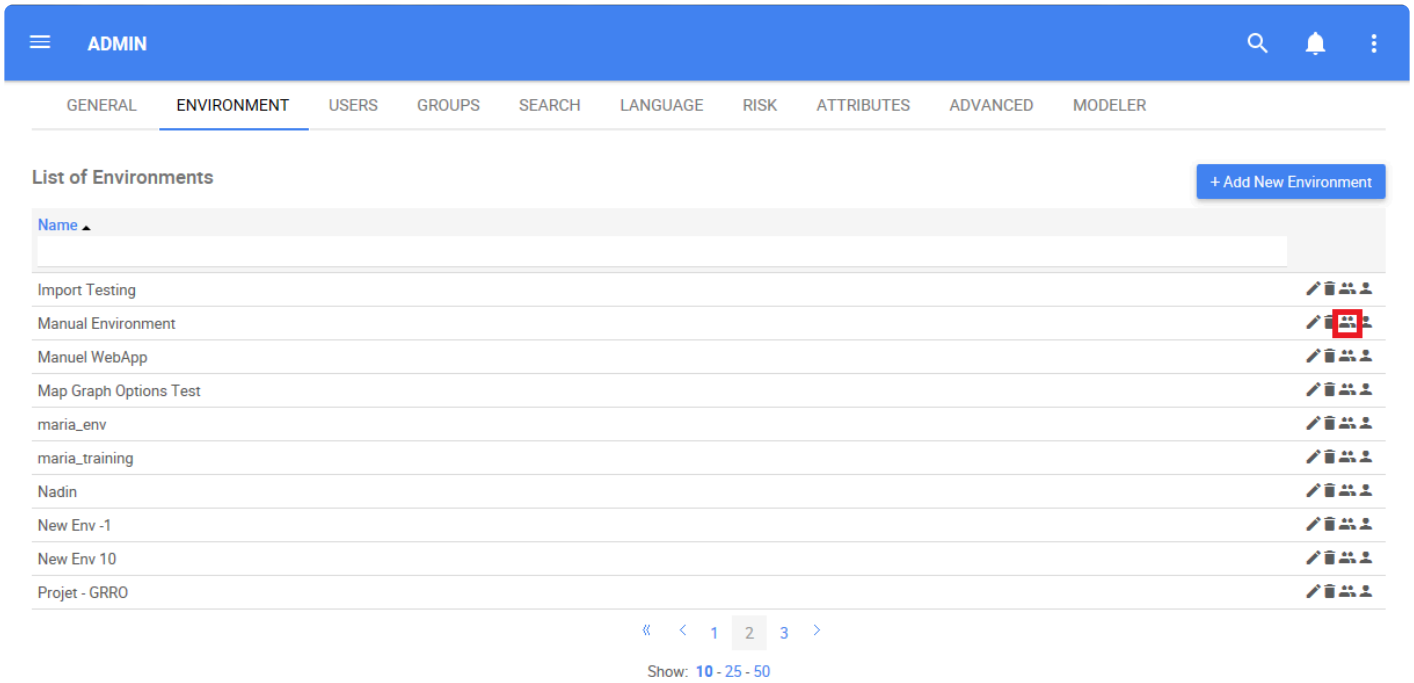
5. Add the Level of Security for the Group. For this example, the “Environment Admin” option is chosen. The system admin will receive an automatic notification when the level of security is successfully added. Refer to the following table to view all the levels of security

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

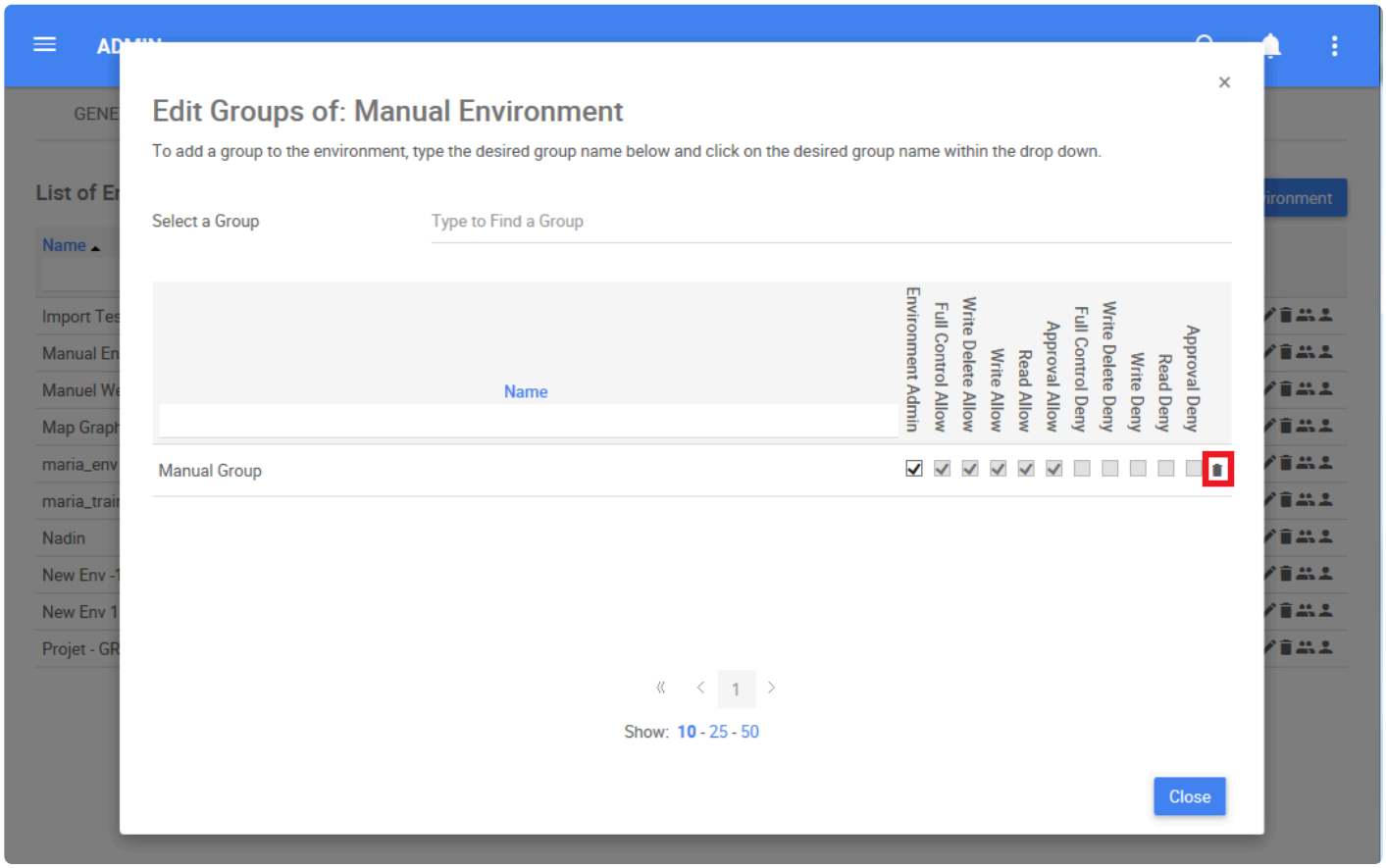


How to Remove a Group from an Environment

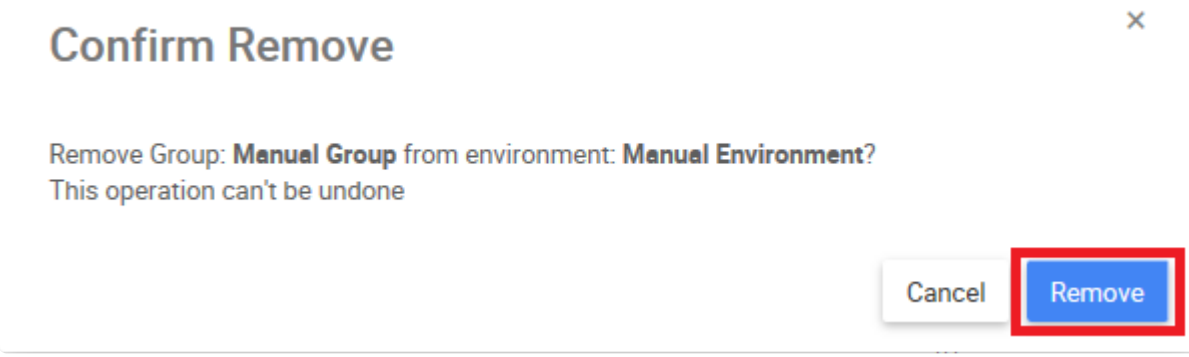
1. Navigate the cursor and select the icon for the environment you want to remove groups from



2. Navigate the cursor and select the icon



3. The following box will appear, select the “Remove” box to remove a group from an environment



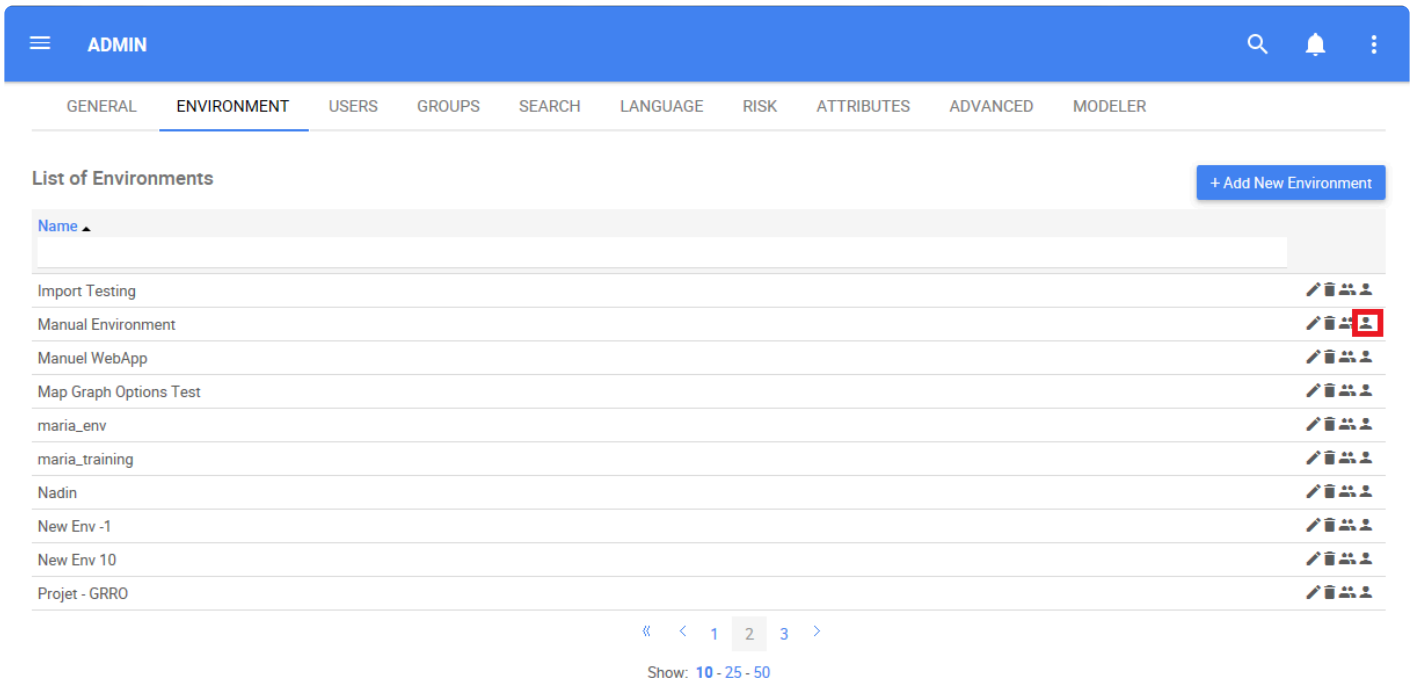
10.2.5 Add User to Environment

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.

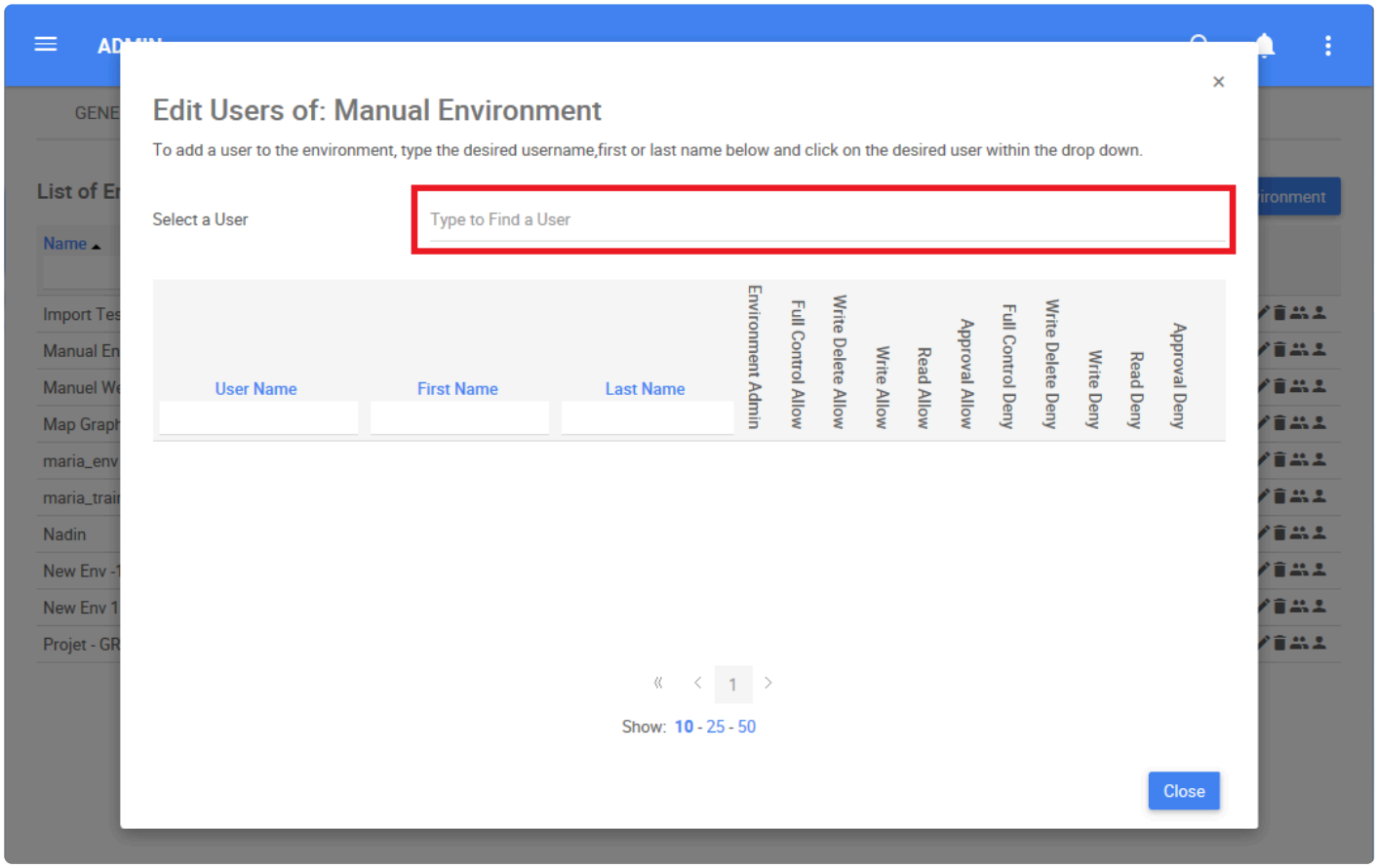
> All deny access' on an environment override any other permission awarded for a user

How to Add a User to an Environment

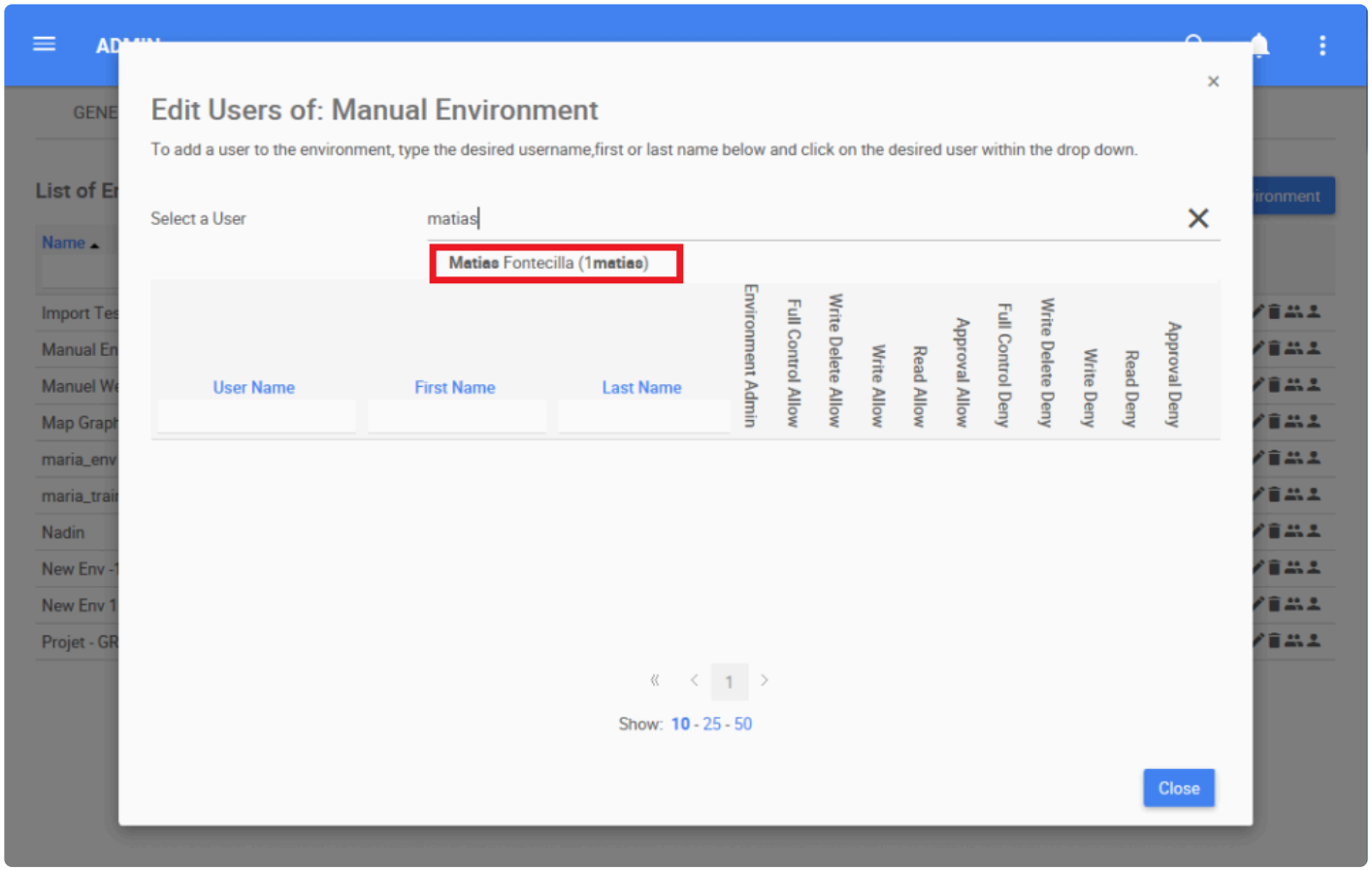
1. Navigate the cursor and select the icon for the environment you want to add users to



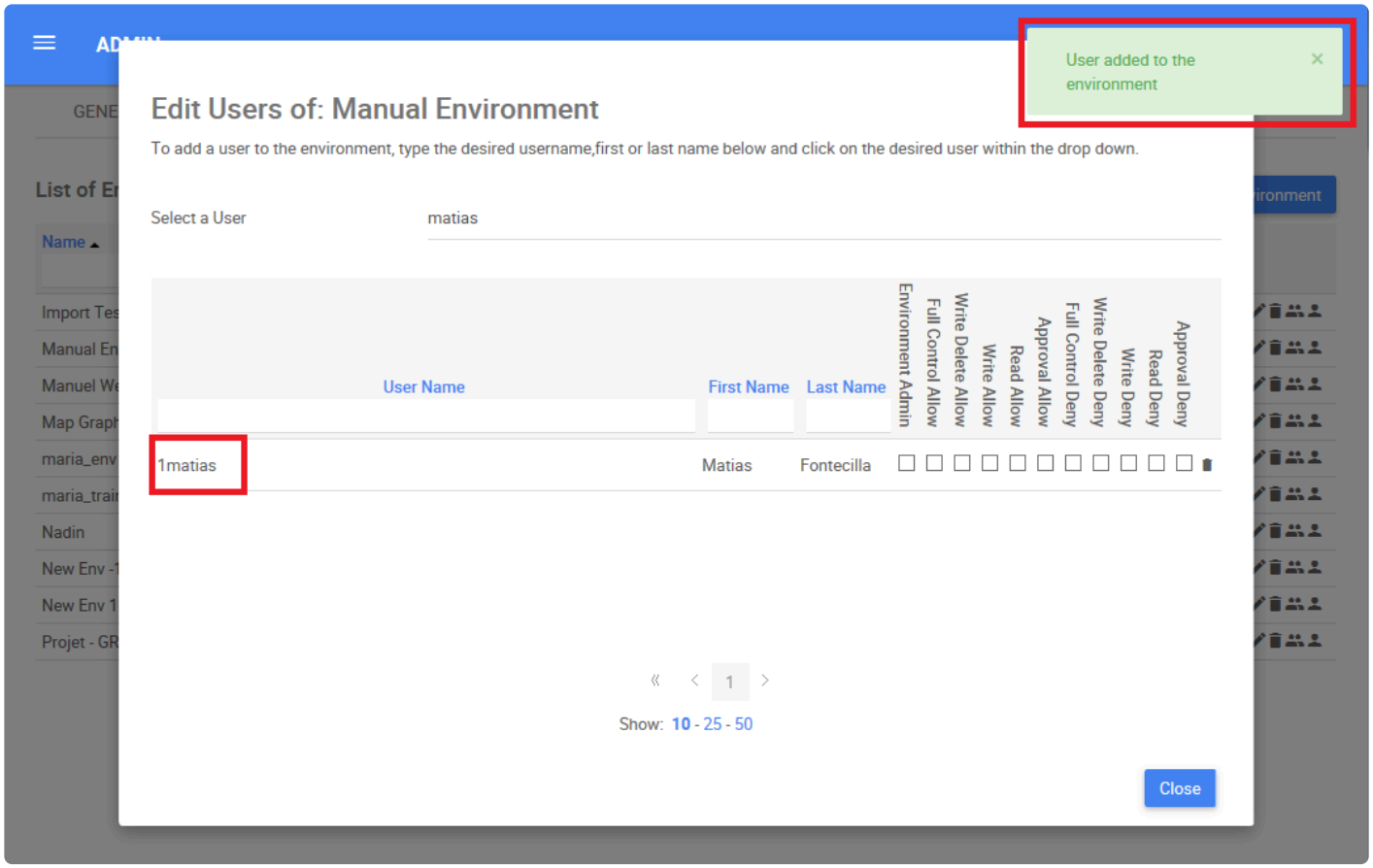
2. Navigate to the "Select a User" search box
p(banner tip). The list of groups will populate below based on key word typing



3. Type the name of the User you want to add to the environment. “Double Click” on the user to finish adding it

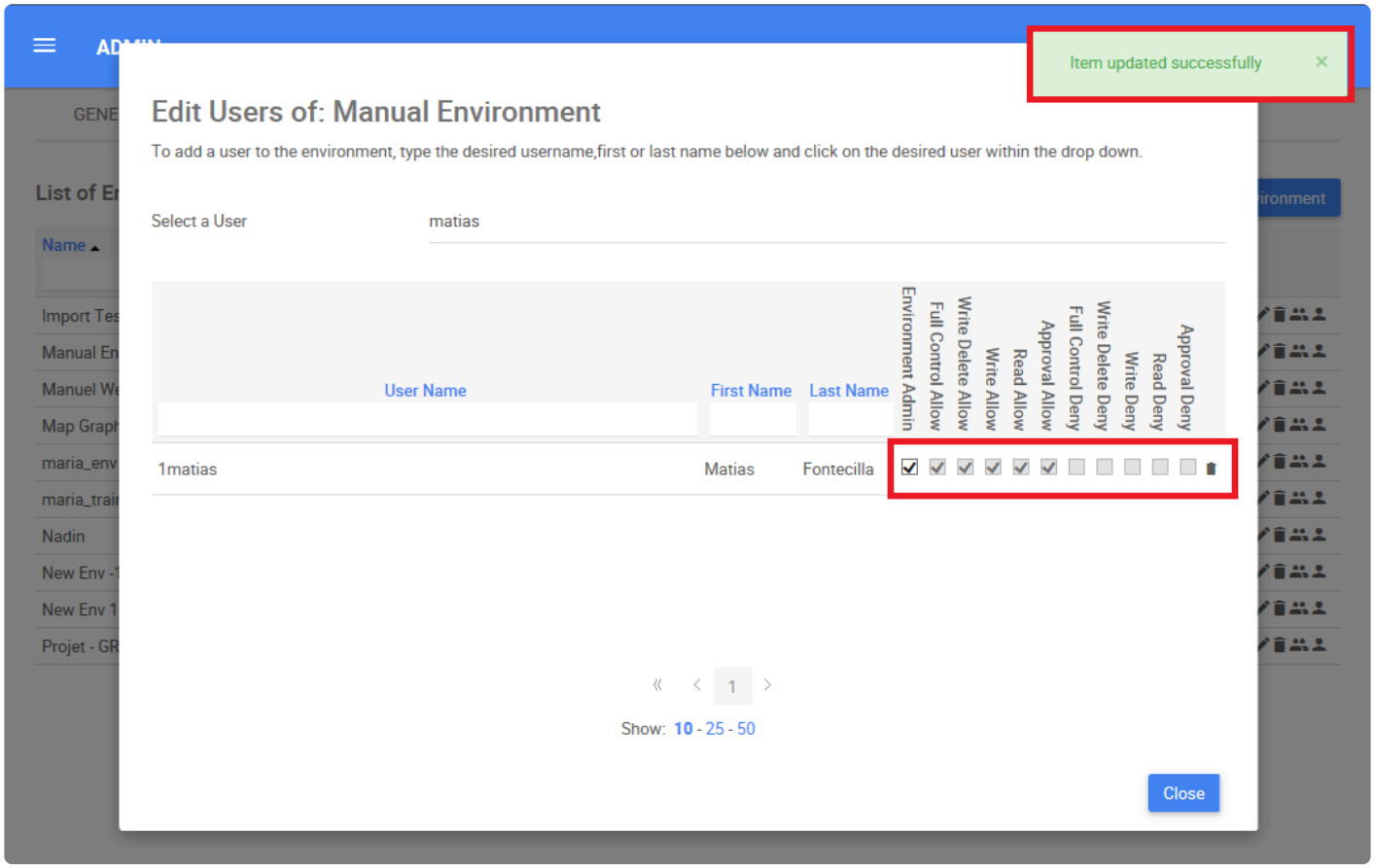


4. The added user will appear on the following table. The system admin will receive an automatic notification when the user is successfully added
p(banner important). This process may take a minute or two to be completed



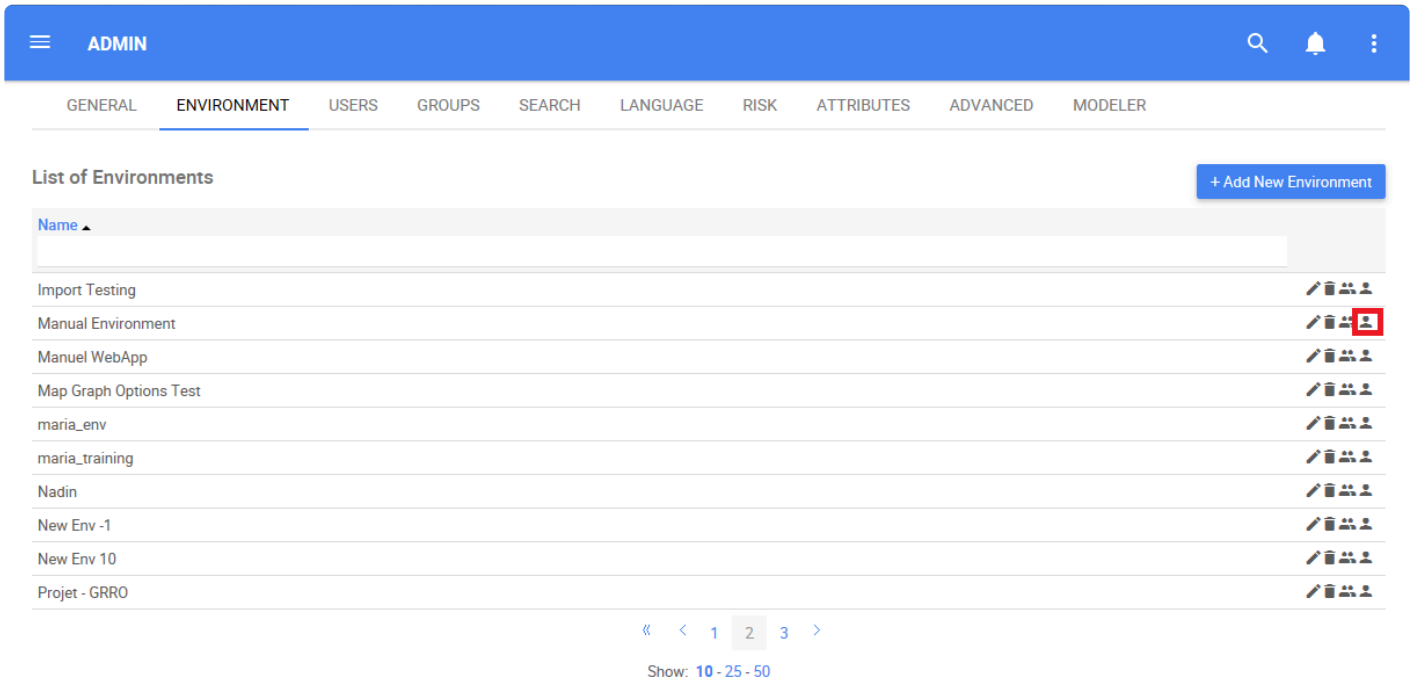
5. Add the Level of Security for the User. For this example, the “Environment Admin” option is chosen. The system admin will receive an automatic notification when the level of security is successfully added. Refer to the following table to view all the levels of security

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

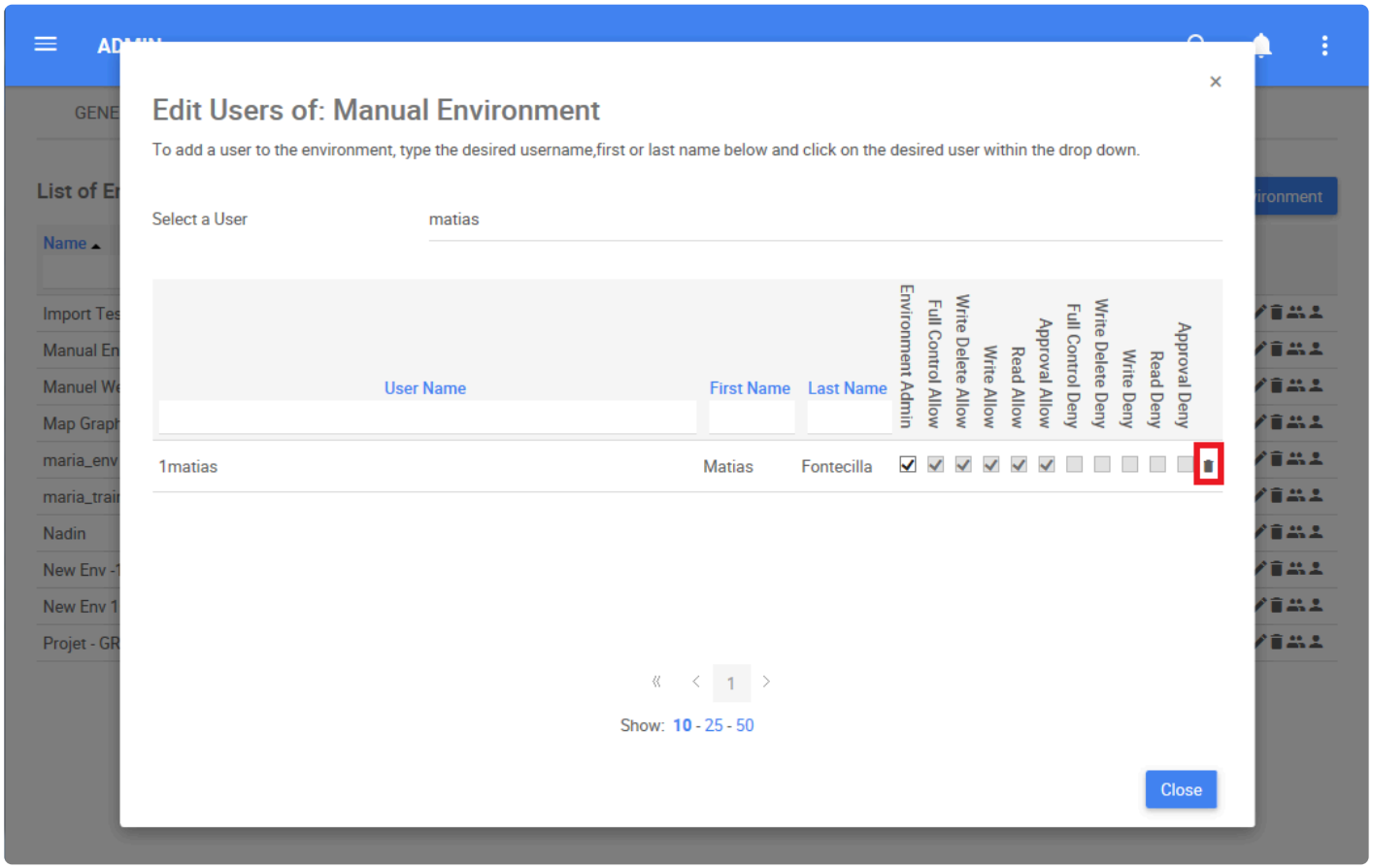


How to Remove a User from an Environment

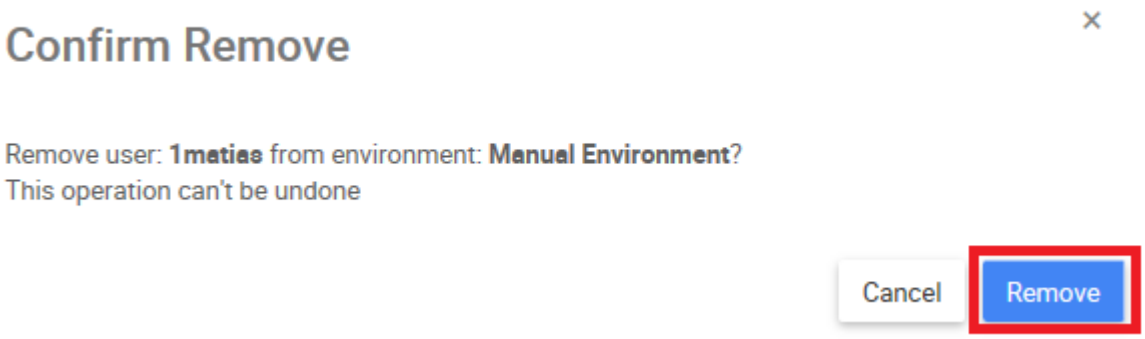
1. Navigate the cursor and select the icon for the environment you want to remove users from



2. Navigate the cursor and select the icon



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

2. Full Control Allow

3. Write Delete Allow

4. Write Allow

5. Read Allow

6. Approval Allow

Approval Deny	☐
Read Deny	☐
Write Deny	☐
Write Delete Deny	☐
Full Control Deny	☐
Approval Allow	☑
Read Allow	☑
Write Allow	☐
Write Delete Allow	☐
Full Control Allow	☐
Environment Admin	☐

7. Full Control Deny

Approval Deny	☑
Read Deny	☑
Write Deny	☑
Write Delete Deny	☑
Full Control Deny	☑
Approval Allow	☐
Read Allow	☐
Write Allow	☐
Write Delete Allow	☐
Full Control Allow	☐
Environment Admin	☐

8. Write Delete Deny

Approval Deny	☑
Read Deny	☑
Write Deny	☑
Write Delete Deny	☑
Full Control Deny	☐
Approval Allow	☐
Read Allow	☐
Write Allow	☐
Write Delete Allow	☐
Full Control Allow	☐
Environment Admin	☐

9. Write Deny

Approval Deny	☐
Read Deny	☐
Write Deny	☑
Write Delete Deny	☑
Full Control Deny	☐
Approval Allow	☐
Read Allow	☐
Write Allow	☐
Write Delete Allow	☐
Full Control Allow	☐
Environment Admin	☐

10. Read Deny

Approval Deny	☑
Read Deny	☑
Write Deny	☑
Write Delete Deny	☑
Full Control Deny	☑
Approval Allow	☐
Read Allow	☐
Write Allow	☐
Write Delete Allow	☐
Full Control Allow	☐
Environment Admin	☐

11. Approval Deny

Approval Deny	☑
Read Deny	☐
Write Deny	☐
Write Delete Deny	☐
Full Control Deny	☐
Approval Allow	☐
Read Allow	☐
Write Allow	☐
Write Delete Allow	☐
Full Control Allow	☐
Environment Admin	☐

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

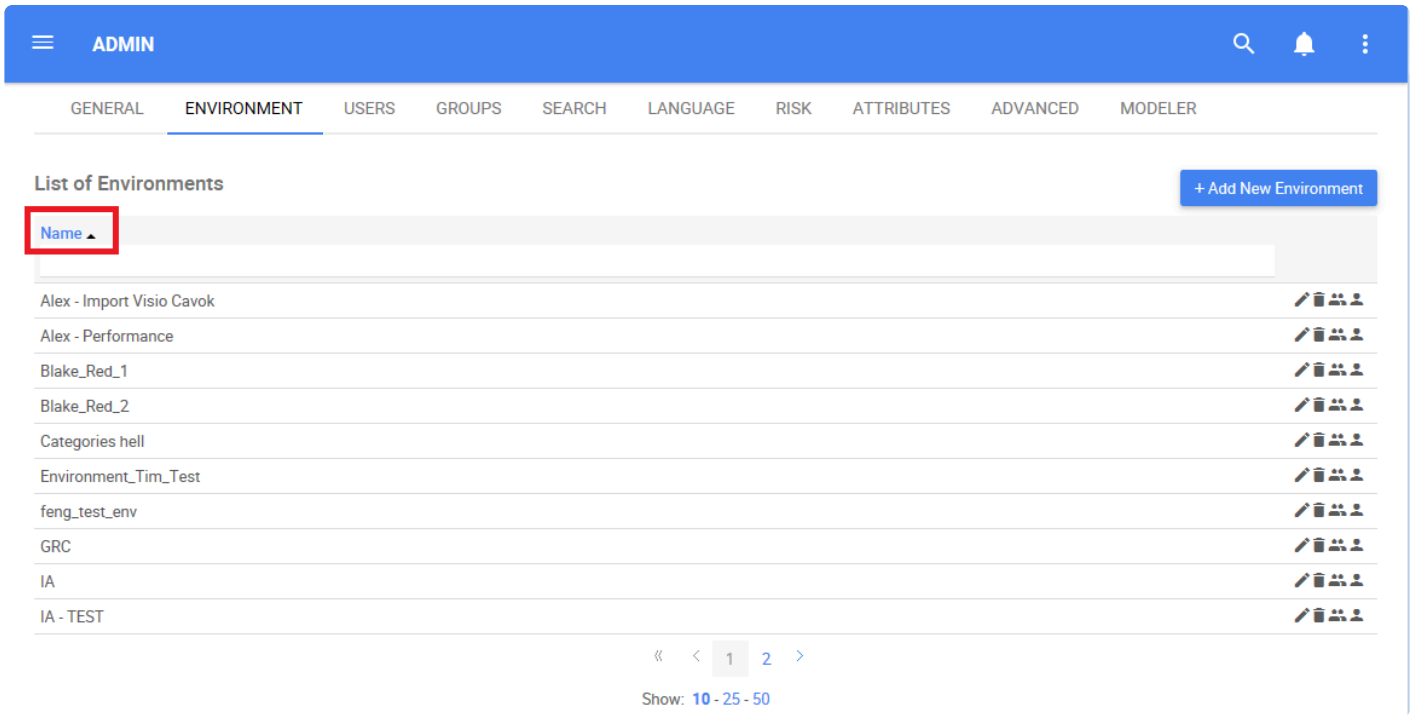
1. Navigate to the System Admin section

2. Navigate the Environment Tab

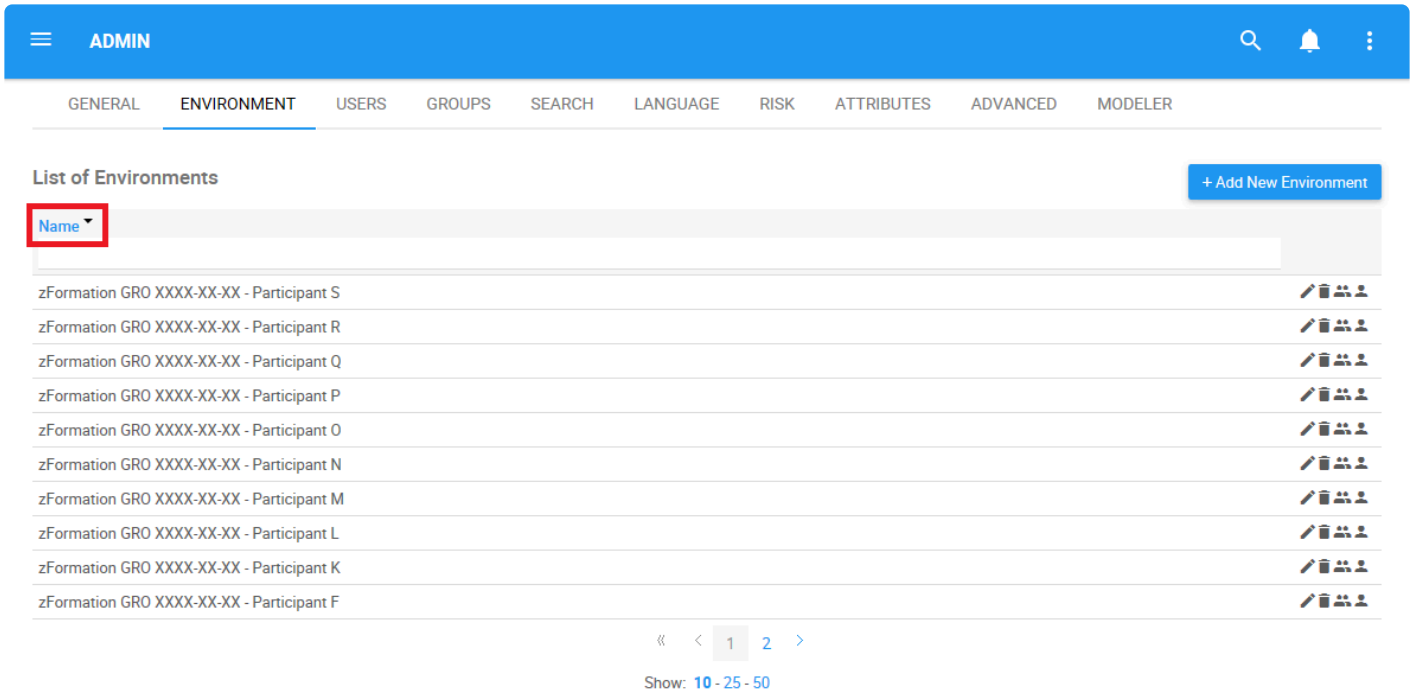
3. Click on the **Name**

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”.

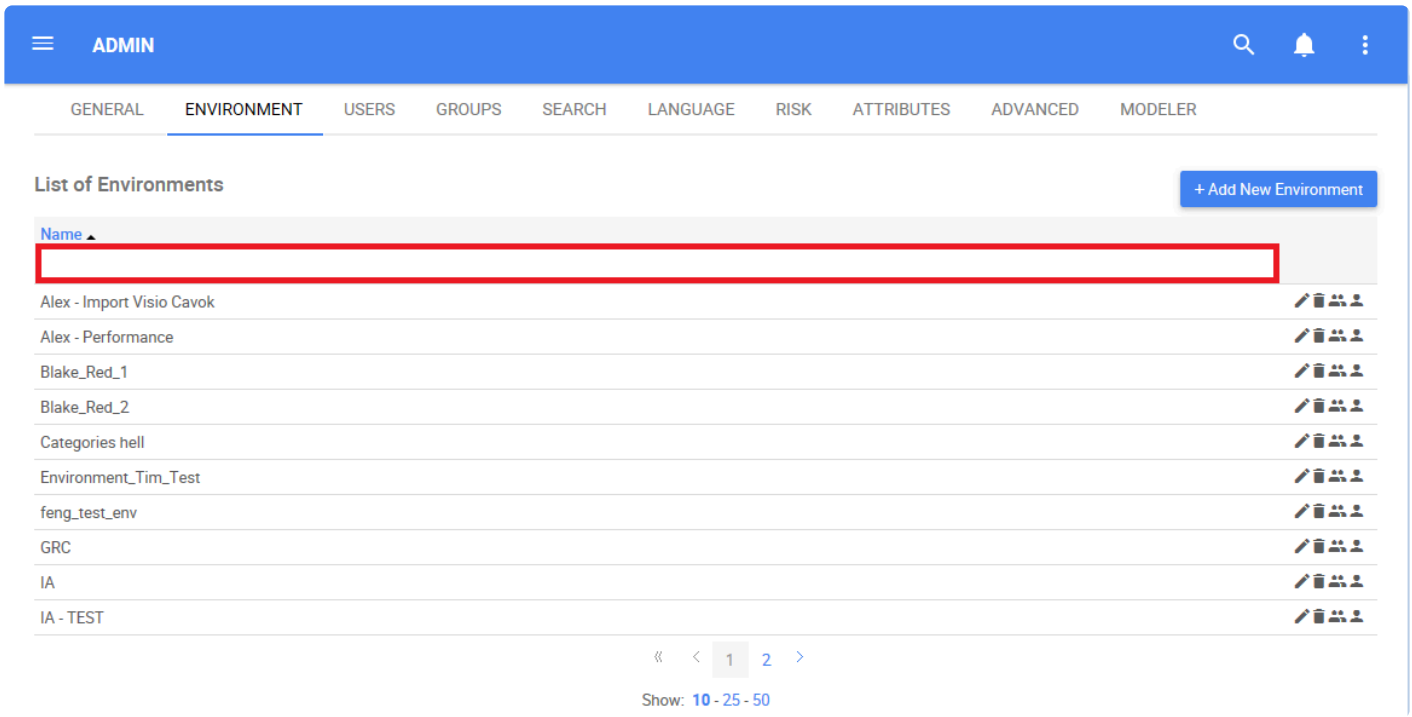


Descending Example: The Name column is sorted in **descending** order. Notice the process names are listed as “C, B, A, 3, 2, 1”.


ADMIN
GENERAL
ENVIRONMENT
USERS
GROUPS
SEARCH
LANGUAGE
RISK
ATTRIBUTES
ADVANCED
MODELER
List of 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 Filtering section will cover the following:

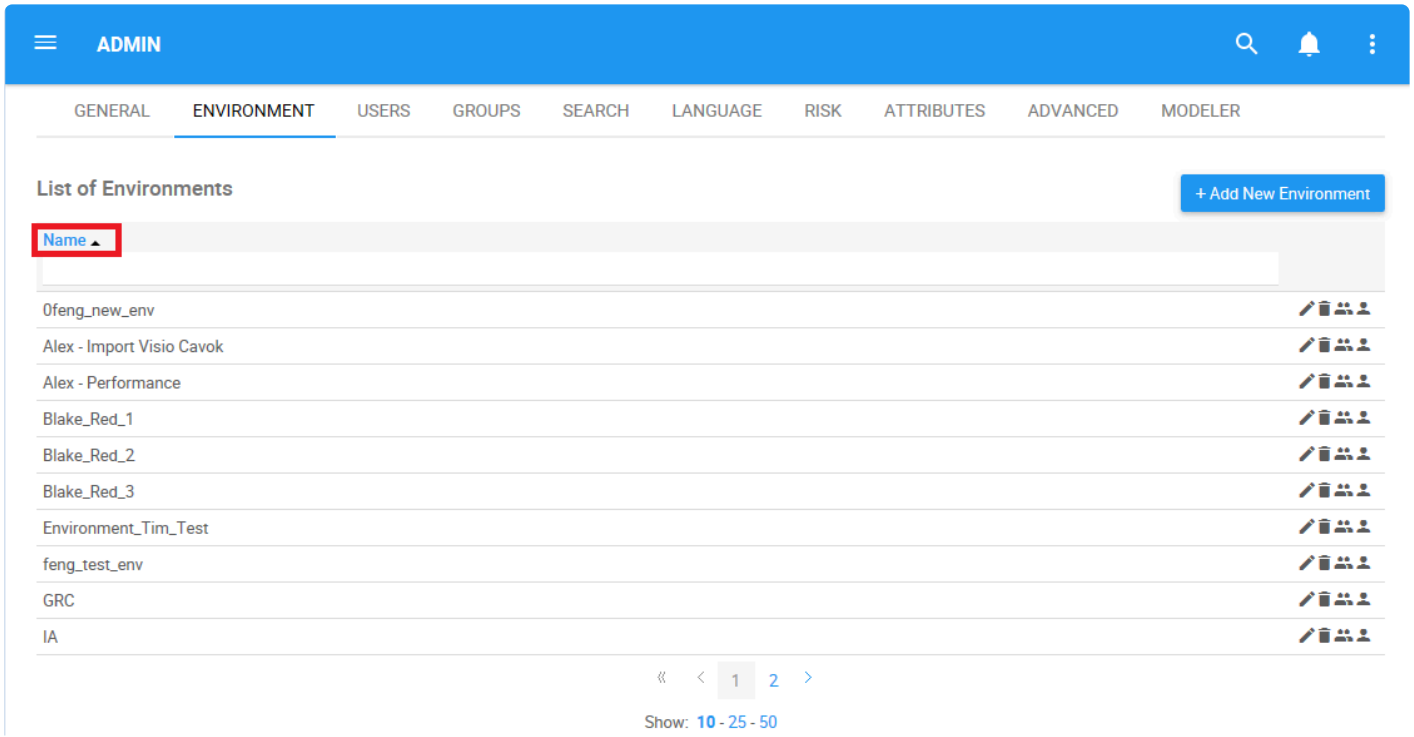
1. How to Add Filters
2. How to Remove Filters

10.2.8.1 Add Filter

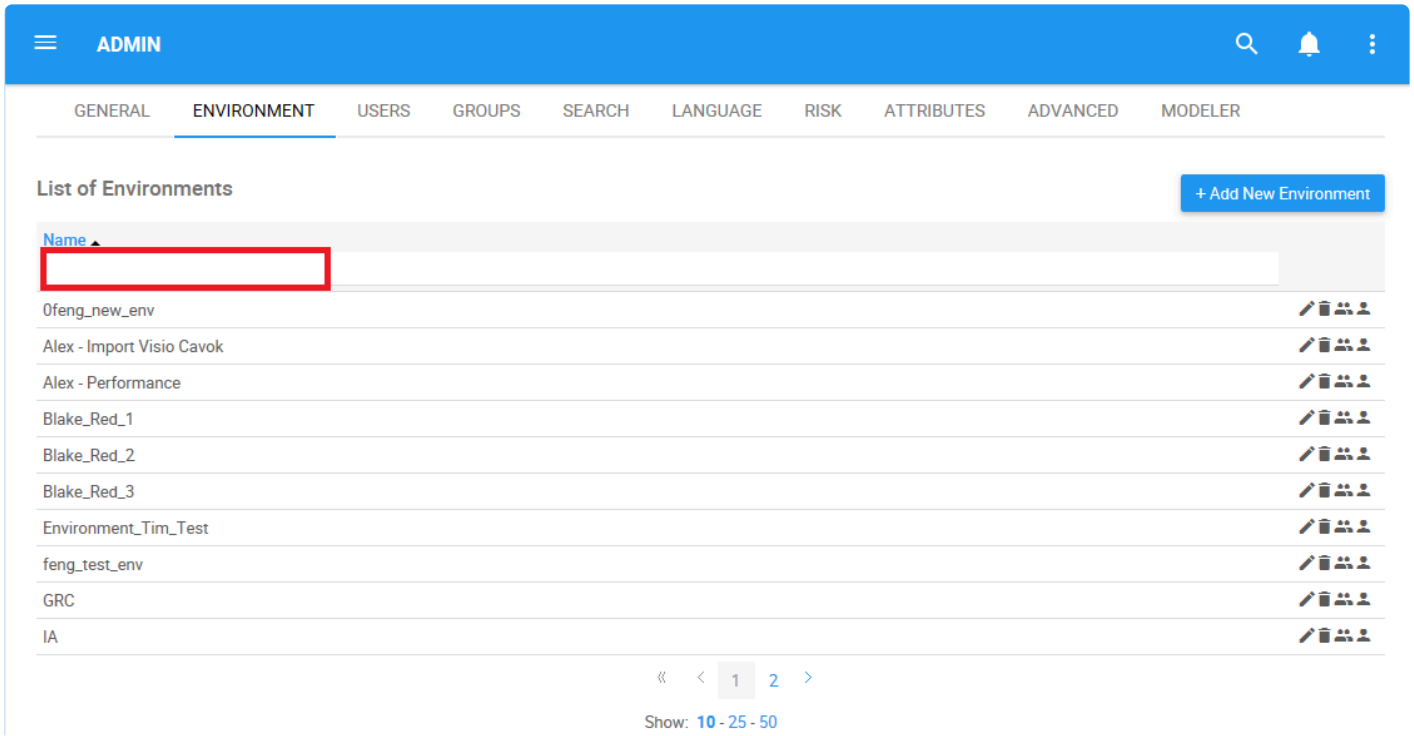
System Admins can add filters to see the items of its choice. **Type** what you are looking for to filter the list

How to Add Filter

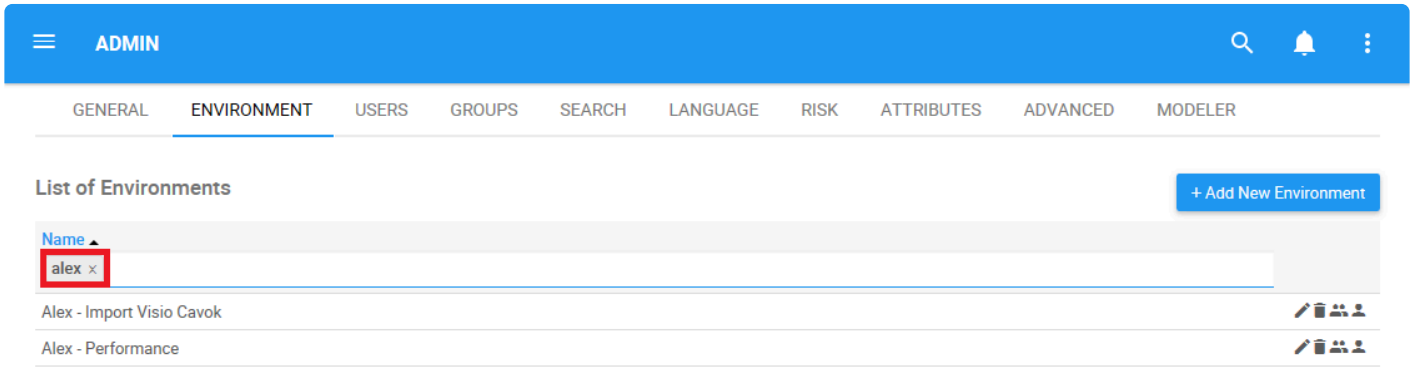
1. Navigate cursor to the “Name” column to add a filter



2. Type the word you are looking for to filter the list on the search box and click on “enter”



3. For this example, we will type “Alex.” The EPC will populate the results with the new filter

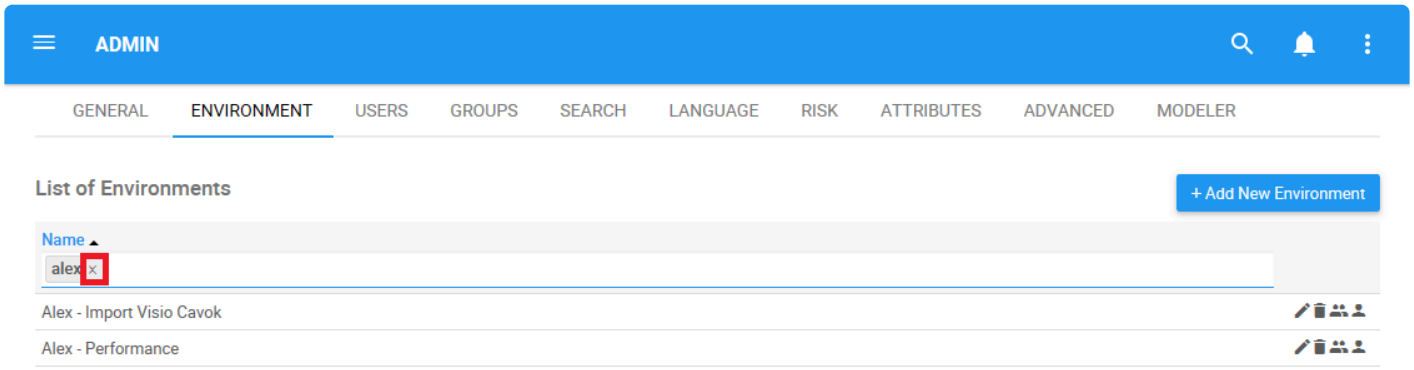


10.2.8.2 Remove Filter

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.



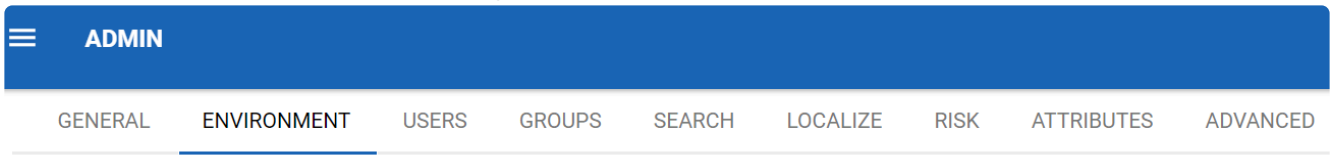
10.2.9 Environment Purge

Environments remain stored in the EPC database even after deletion. Over time, a collection of deleted environments will result in a considerable amount of occupied storage space on the server that is no longer useful. Otherwise, perhaps the data from the deleted environments is simply outdated and deprecated, and there is no sense in keeping it on the server. Furthermore, having useless data in a database means a loss of potential performance since the server needs to manage and sift through more data to operate. Environments can therefore be purged to eliminate all data from a deleted environment, consequently freeing up storage space and potential regaining some operational performance.

> ! When an environment is purged, the data is permanently deleted and cannot be recovered in any way. Before purging, a backup is recommended.

Purge Environments

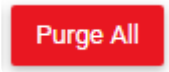
1. Access the Environments tab within **System Admin**



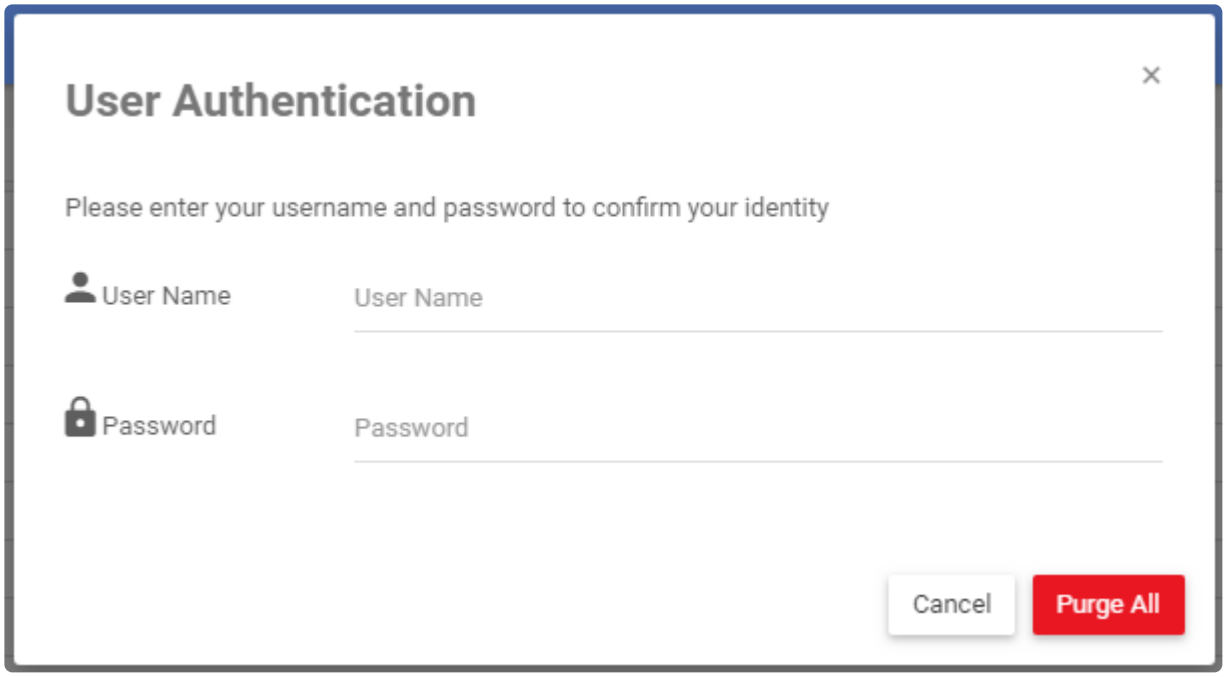
2. Scroll down to the **Deleted Environments** list

3. **Review** the list of deleted environments. Make sure all of them can be purged.

4. Click **Purge All**



5. You will be prompted to confirm the Purge operation by entering your System Admin credentials. Click **Purge All** once again

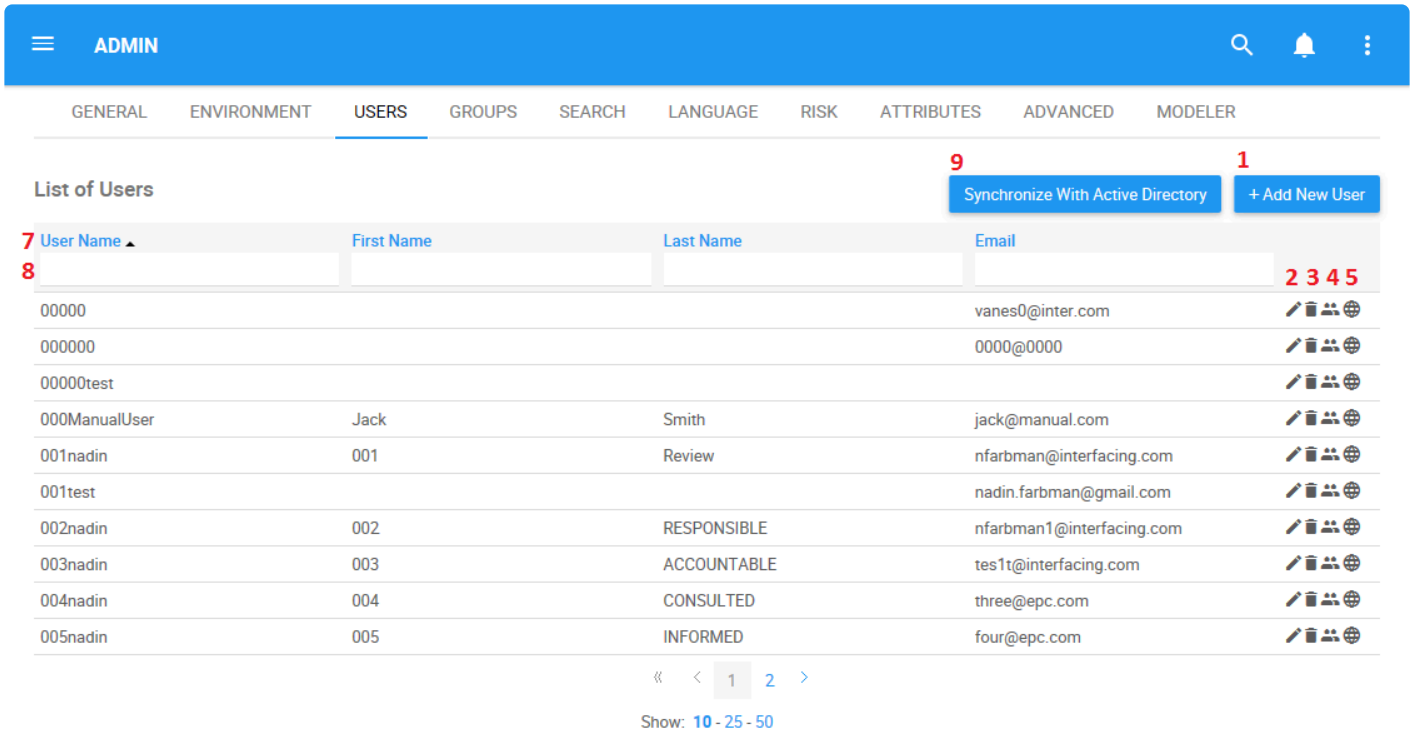

User Authentication
Please enter your username and password to confirm your identity
User Name
User Name
Password
Password
Cancel
Purge All

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



10.3.1 Add User

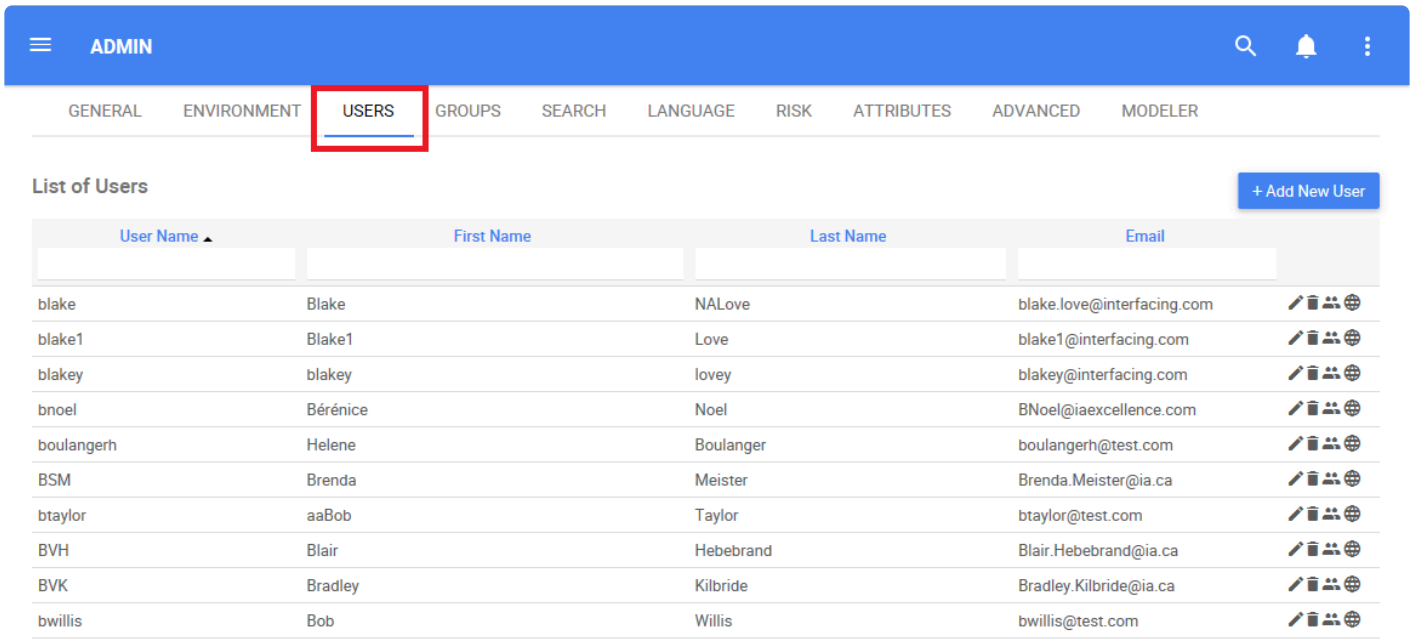
Adding users will create user profiles and individuals can use to access the EPC. System Administrators are responsible for creating the user profile, populating the profile with the necessary information, and awarding access to the user profile.

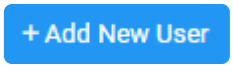
To add a user profile, please see the steps below:

1. Login to the EPC

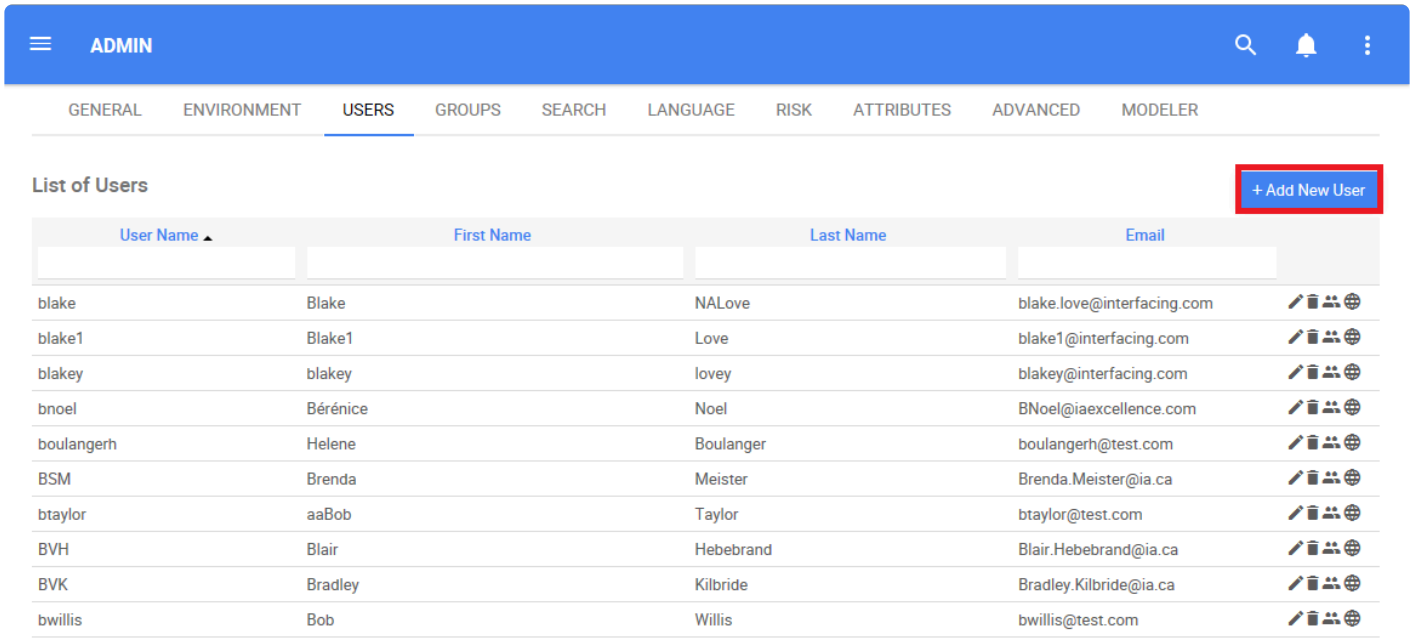
2. Navigate to the System Admin Section

3. Select the Users tab within the System Admin Section. You will be navigated to the User management page.

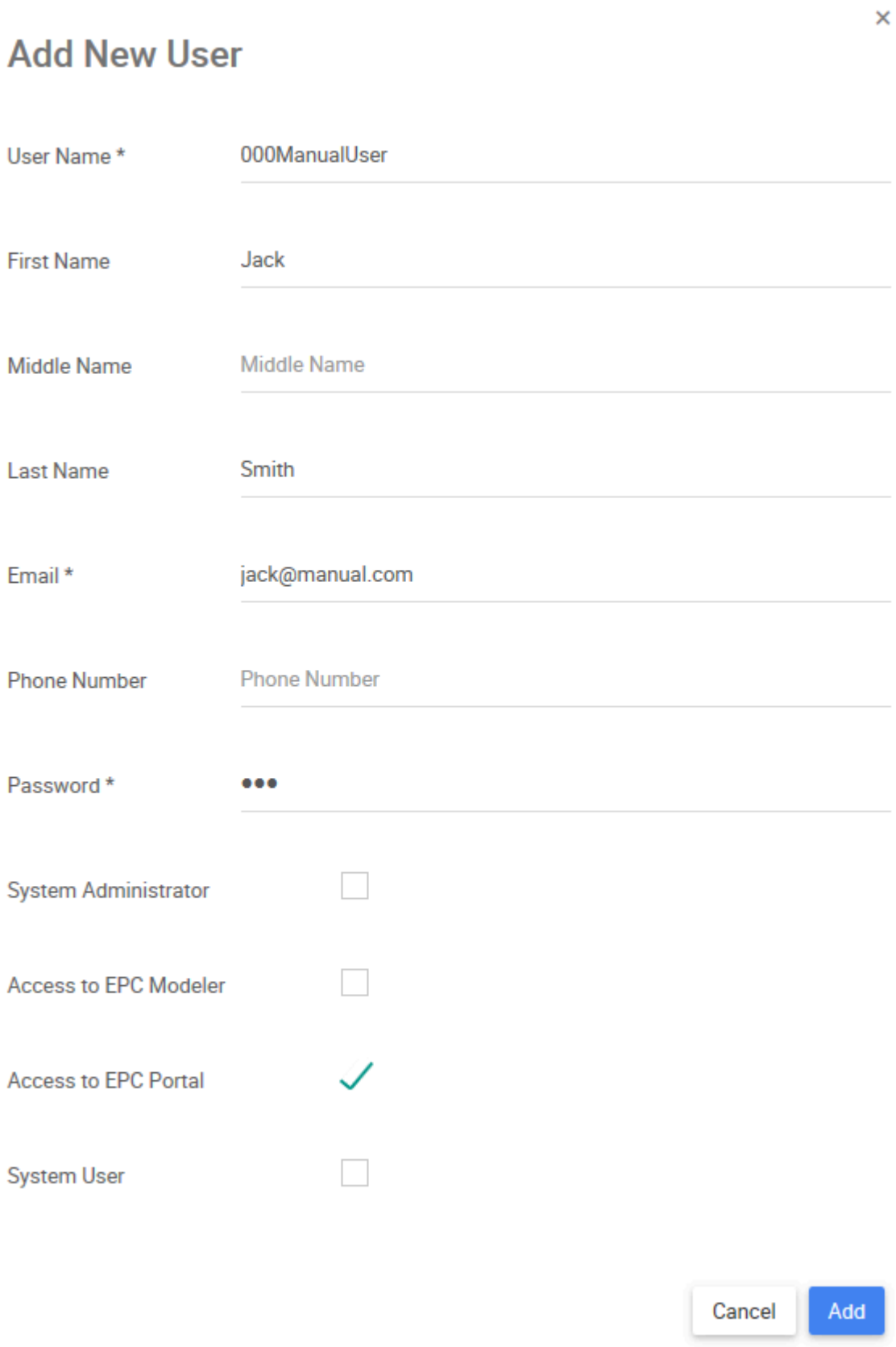


4. To add a user, select the 

button



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”



6. Populate the profile with the appropriate information and then select the Add 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

10.3.1.2 Add Cognito User

For general details on how to add a user, refer to the Add User section. The steps will be the same.

> Cognito must be enabled in the Advanced settings.

Creating a Cognito User

When creating a Cognito User, there are a few rules to follow:

- The username must be a valid email address and should match with the Email field.
- Middle name is mandatory
- Phone number must valid

After the user is created, the user can use his/her credentials to log in. On the first login, the user will be asked to change their password.

After changing their password, the user will be able to log into the webapp.

Multi-Factor Authentication

To enable MFA when creating a user, change **MFA** to **on**. Conversely, to disable it, the value of **MFA** should be **off**.

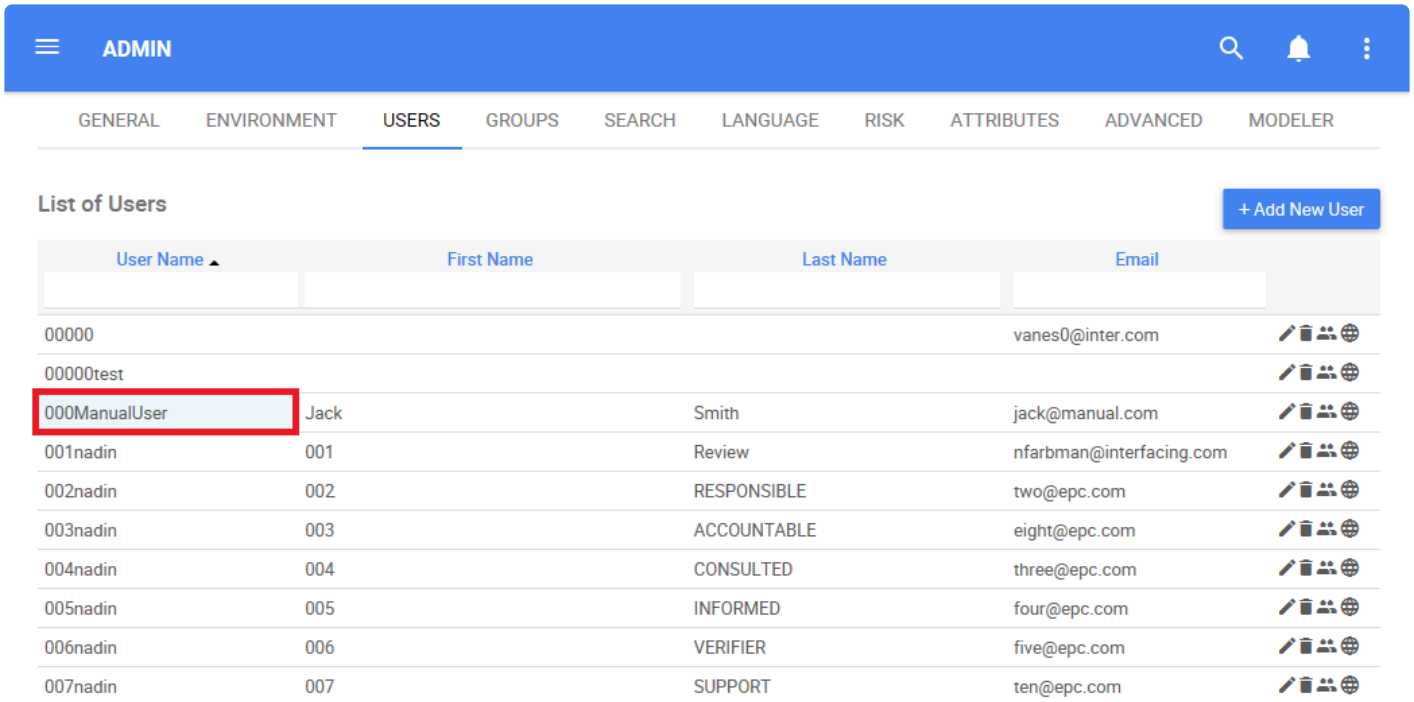
> The MFA authentication code will be received by SMS. TOTP is currently not supported.

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.

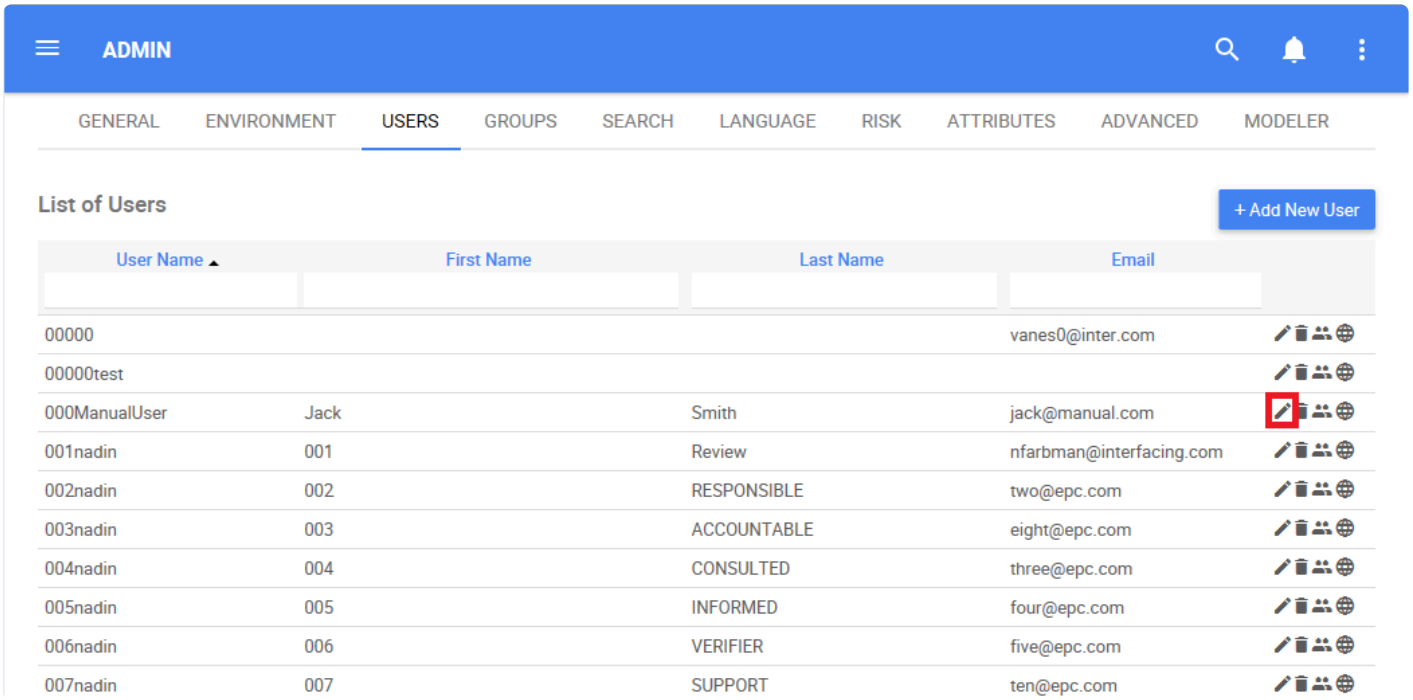
In-Line Editing

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.



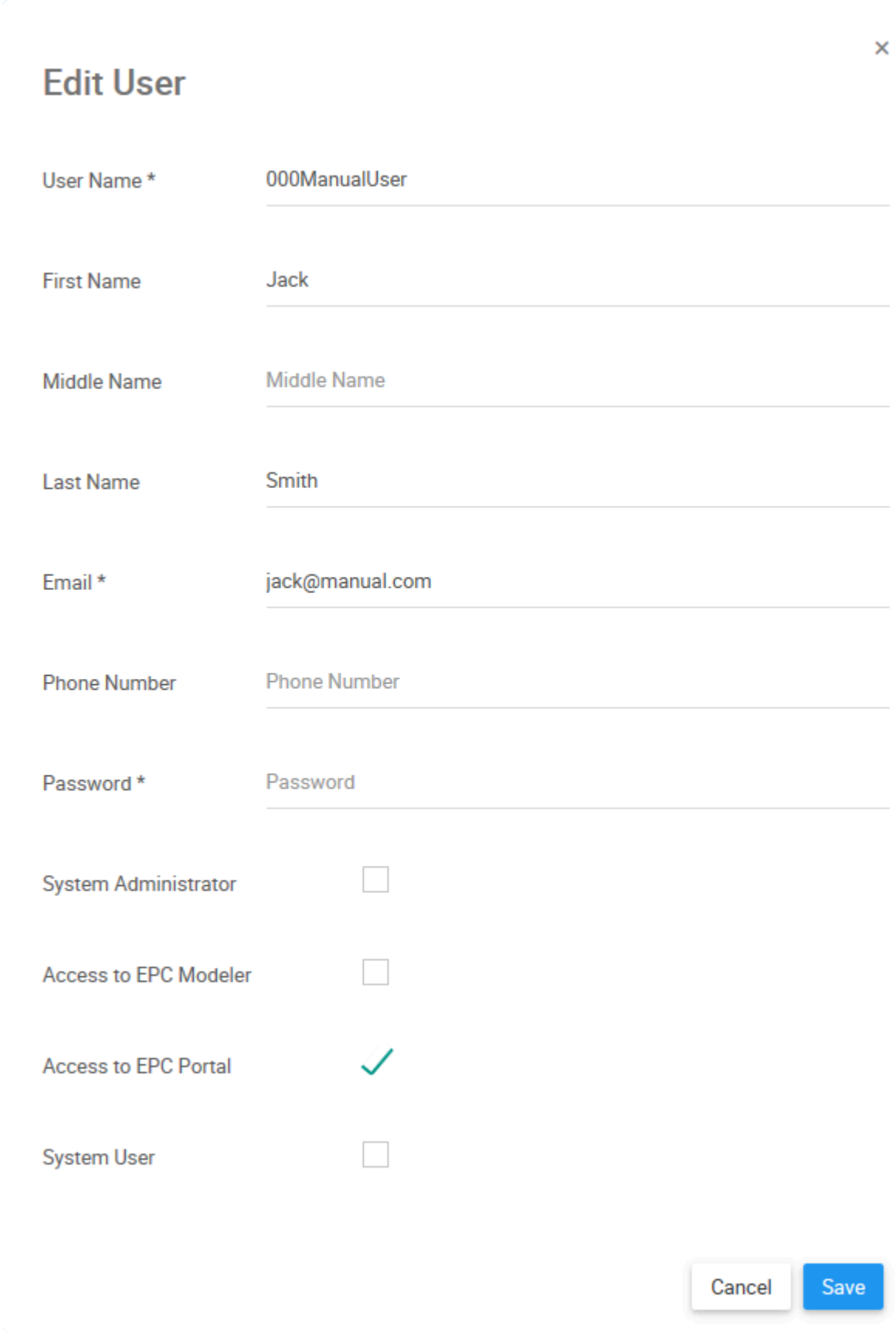
Editing Window

1. For further editing capabilities, navigate the cursor and select the icon featured on the right hand-side of each user.

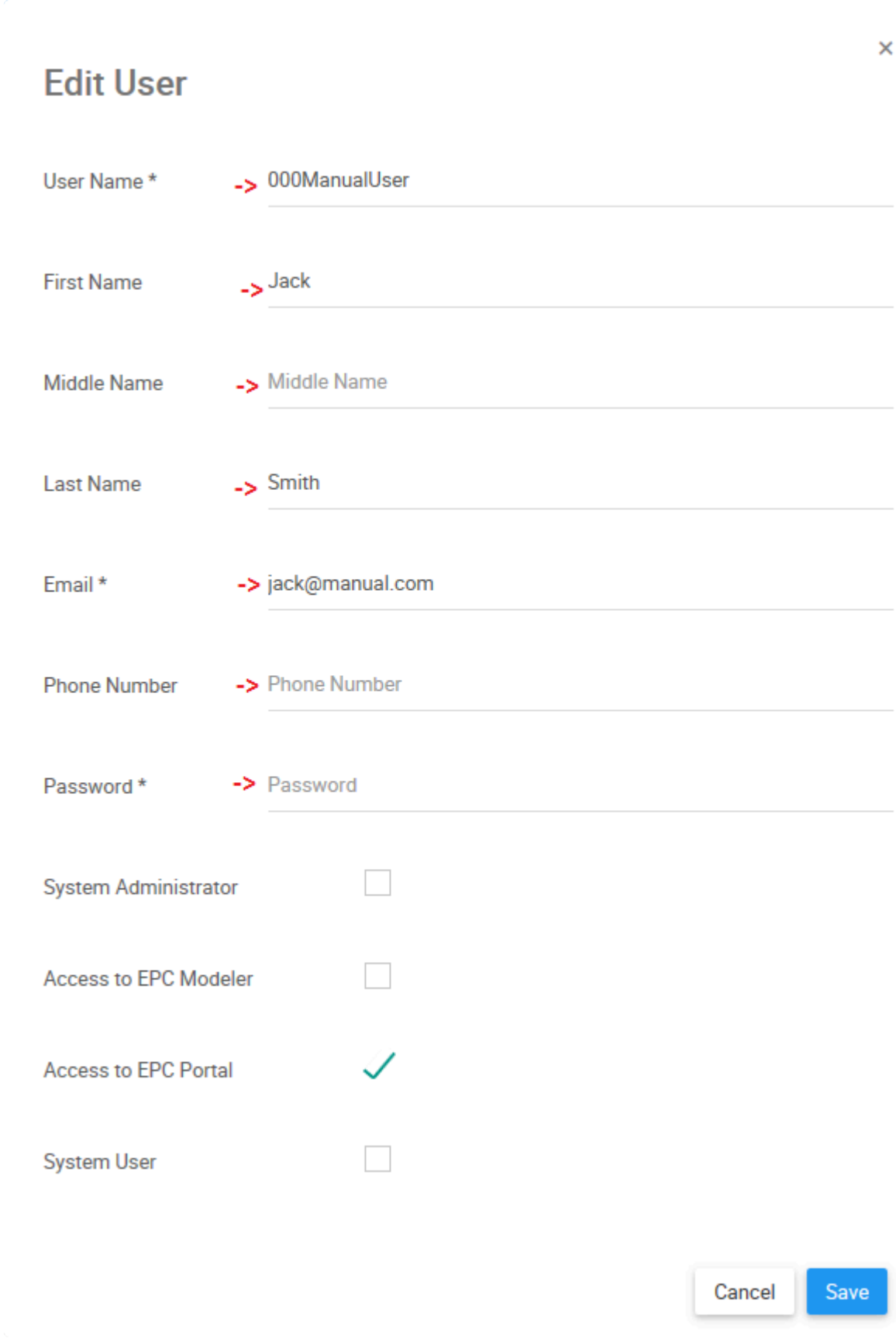


NOTE: If an organization is using any format of Single-Sign-On login, editing users will be disabled within the EPC Web App. This is due to the fact that user accounts are paired with other authentication methods (e.g. Windows Login)

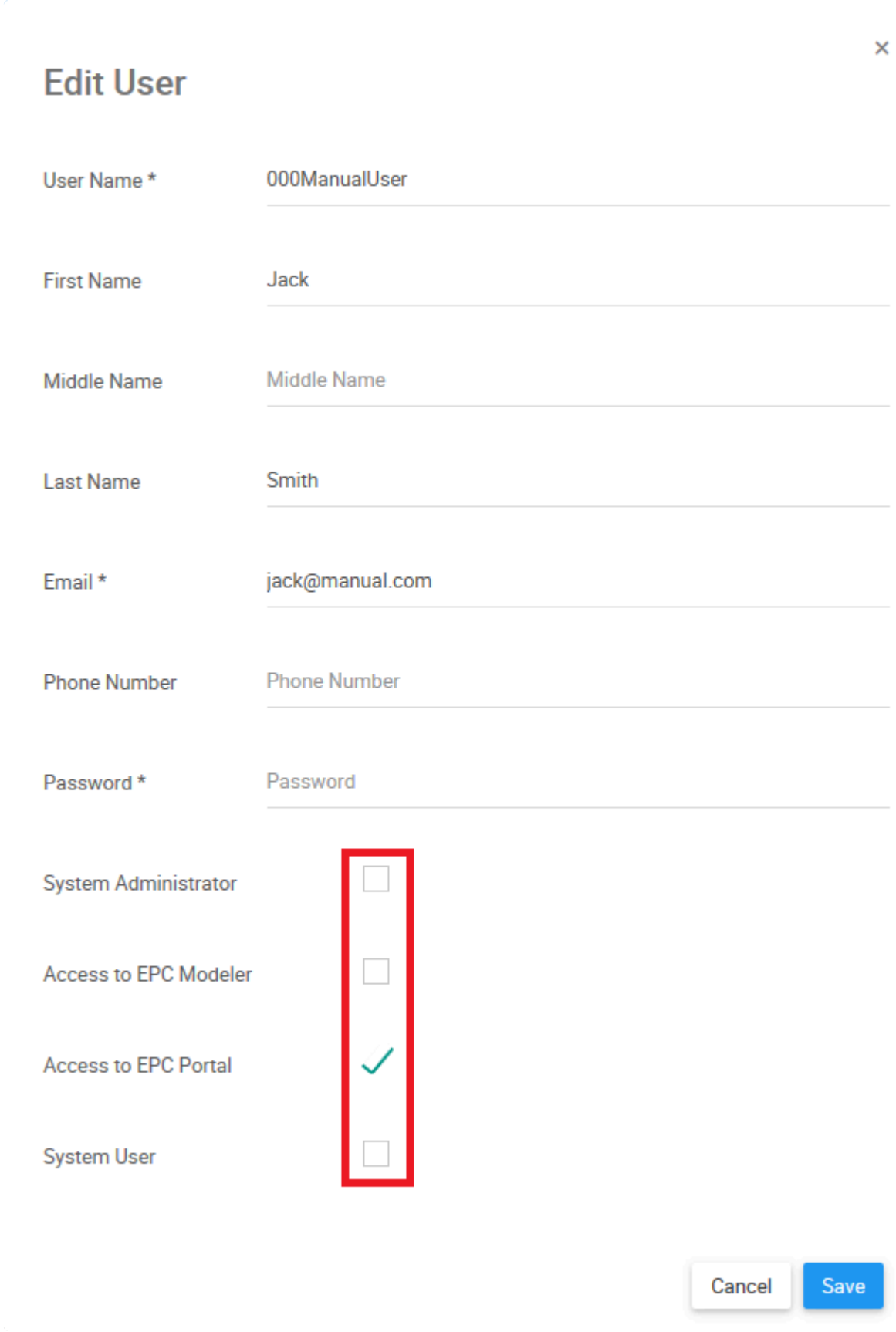
2. Selecting this item will re-open the full user editing page.



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



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 ☐

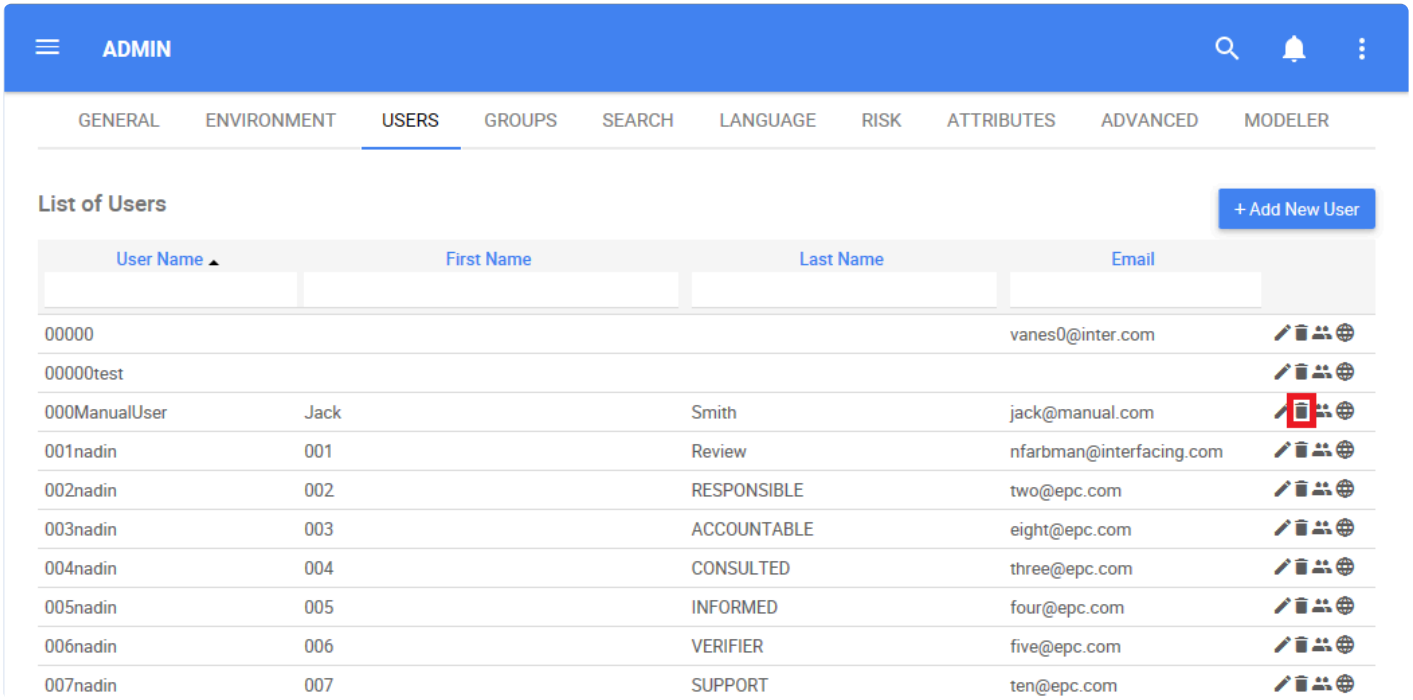
Cancel Save

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



2. The following box will appear and you will be able to delete the User by clicking on the “Delete” box

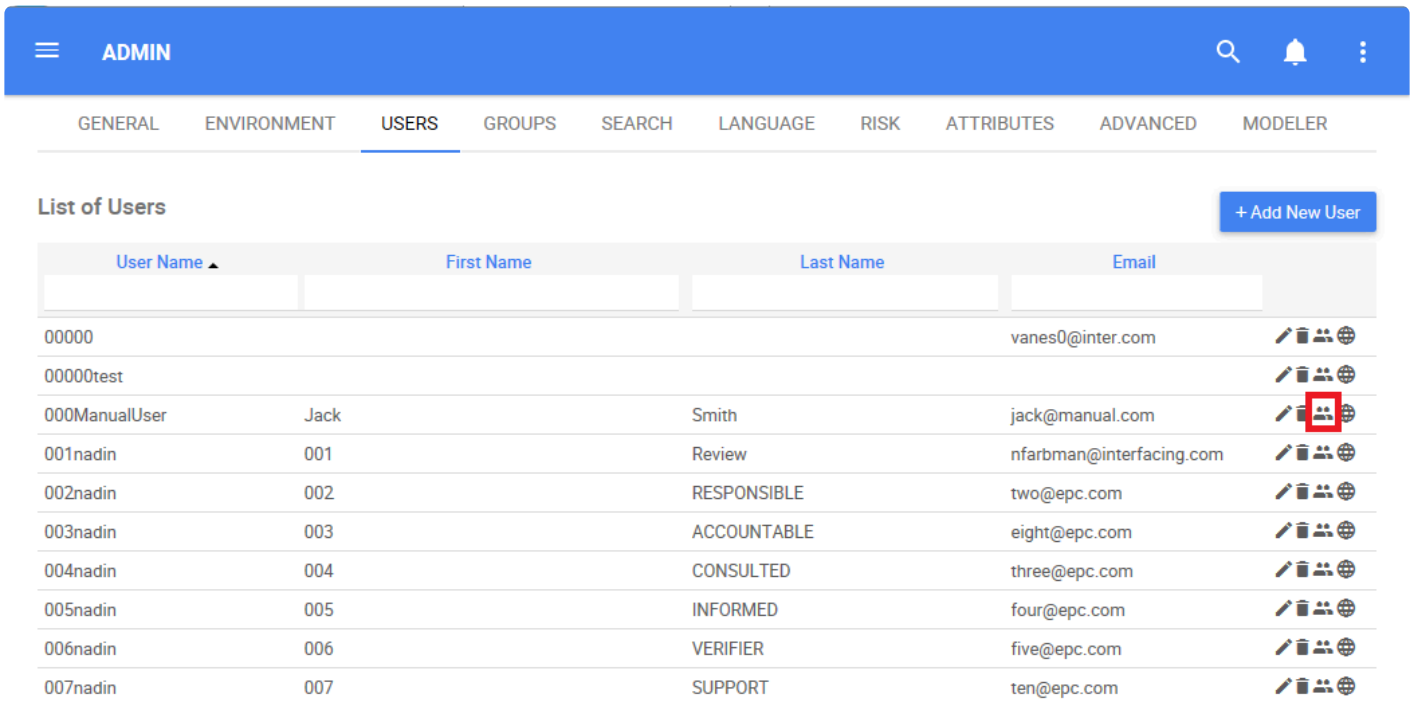
10.3.4 Add User to Group

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.

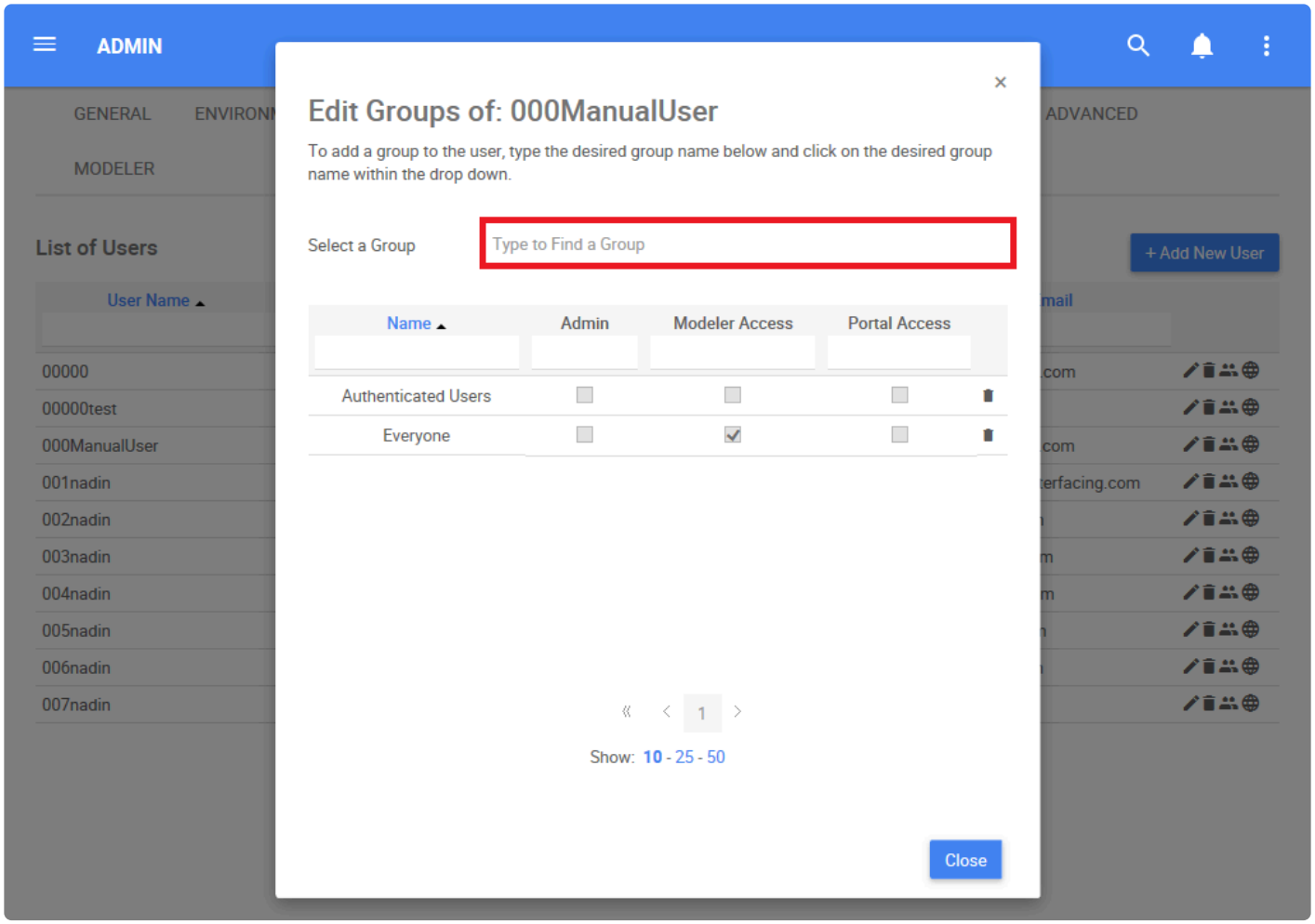
> Every user created by the System Admin will automatically be part of the “Authenticated Users” group and the “Everyone” group. The security settings for these Groups are set by the System Admin under the Groups tab

How to Add a Group to a User

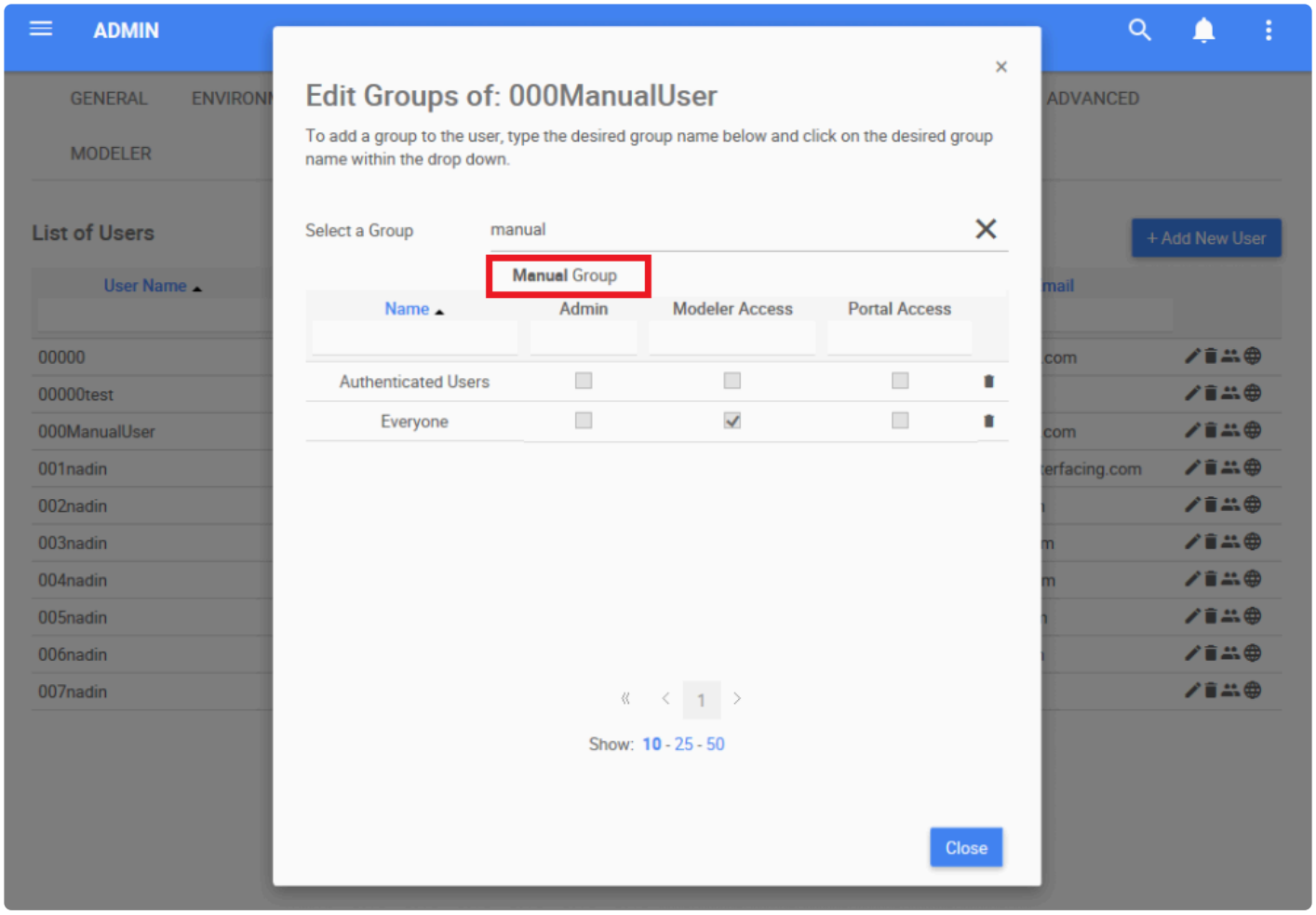
1. Navigate the cursor and select the icon for the User you want to add a group to



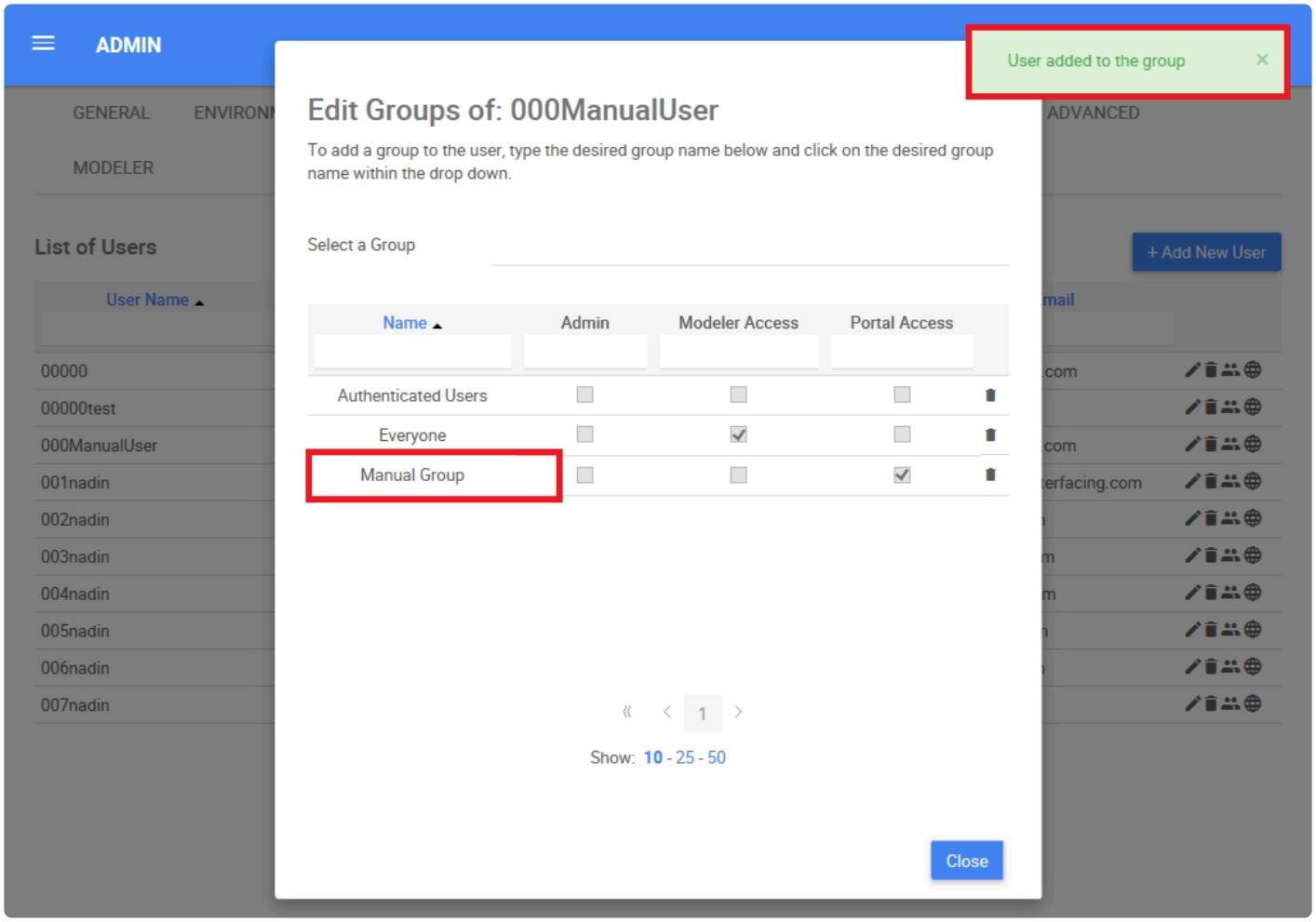
2. Navigate to the “Select a Group” search box
p(banner tip). The list of groups will populate below based on key word typing



3. Type the name of the Group you want to add to the User. “Double Click” on the group to finish adding it



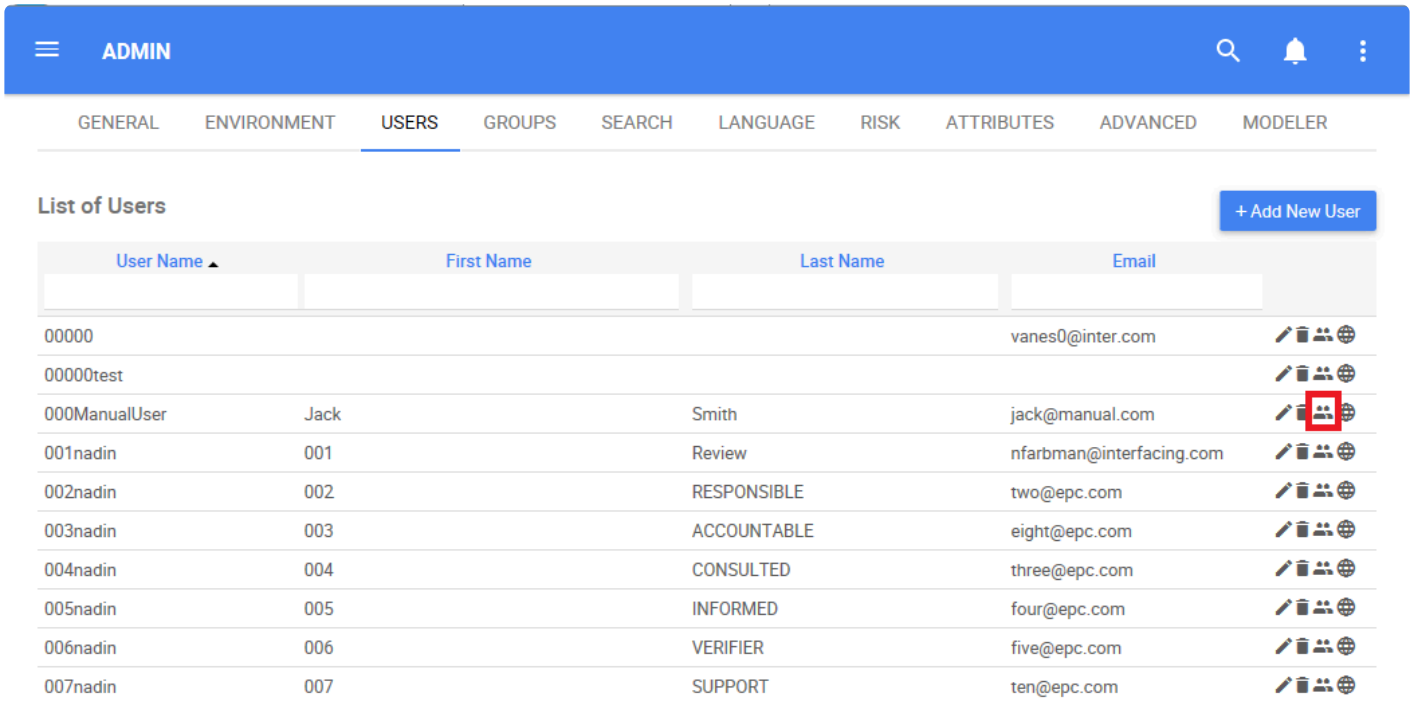
4. The added group will appear on the following table. The system admin will receive an automatic notification when the group is successfully added
p(banner important). This process may take a minute or two to be completed



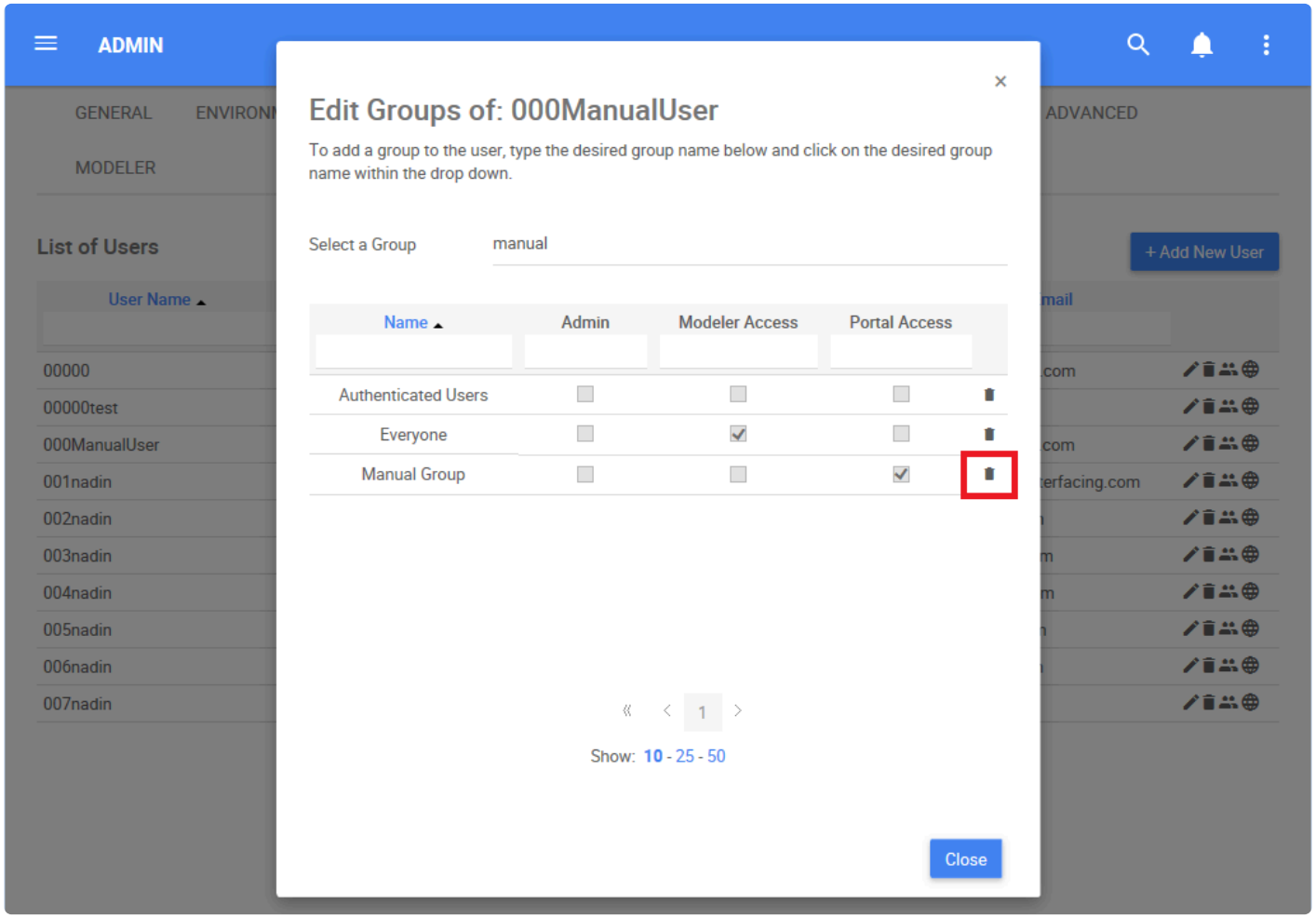
User groups have three levels of security, Users under a group can either be Admins, have Modeler Access, and/or Portal Access. The security settings for these Groups are set by the System Admin under the Groups tab

How to Remove a Group from a User

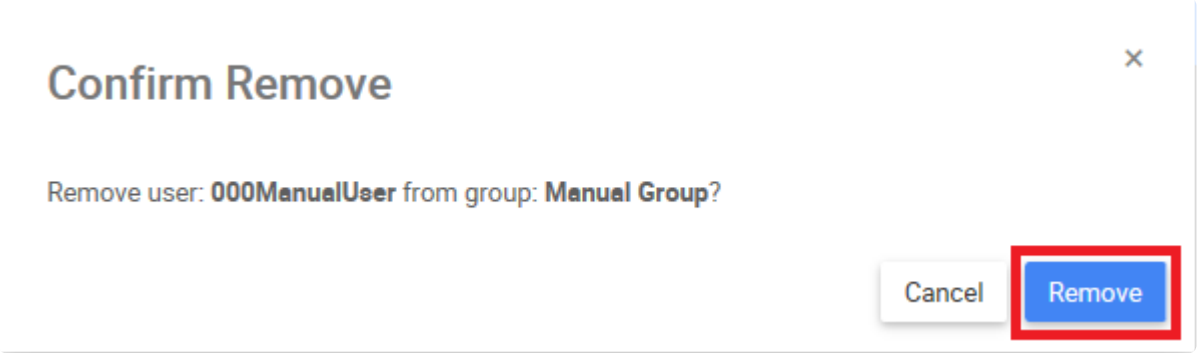
1. Navigate the cursor and select the icon for the User you want to remove groups from



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

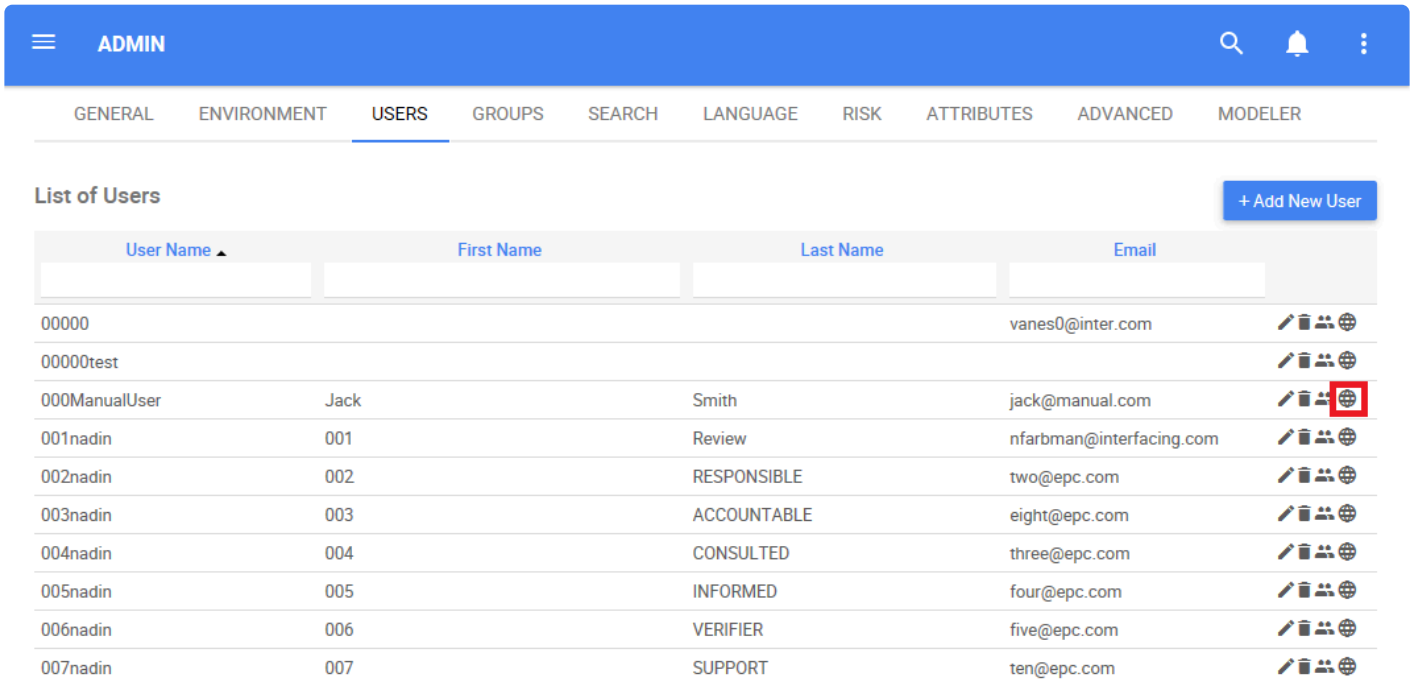


10.3.5 Add User to Environment

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.

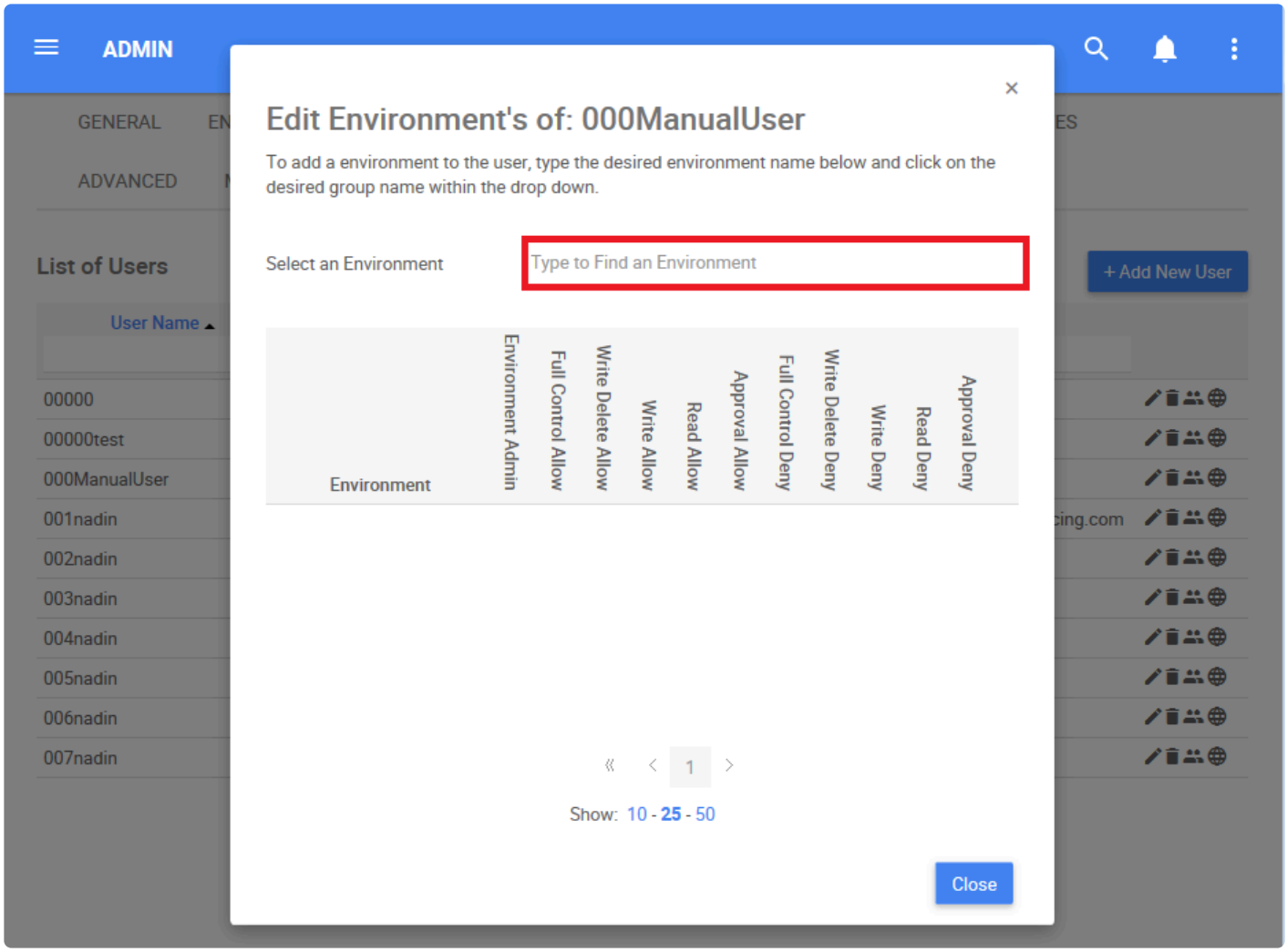
How to Add an Environment to a User

1. Navigate the cursor and select the icon for the User you want to add an environment to

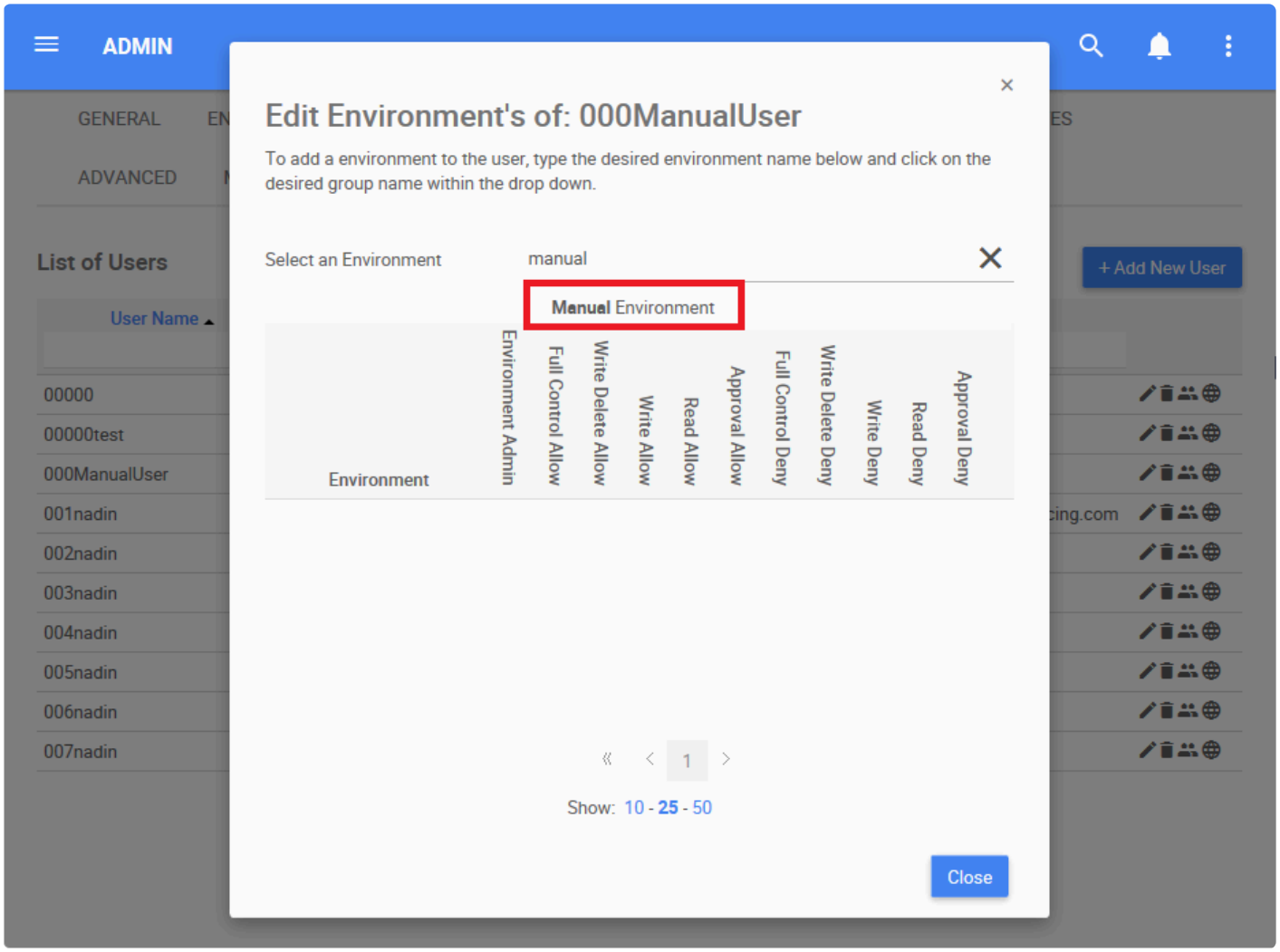


2. Navigate to the “Select an Environment” search box

> The list of environments will populate below based on key word typing

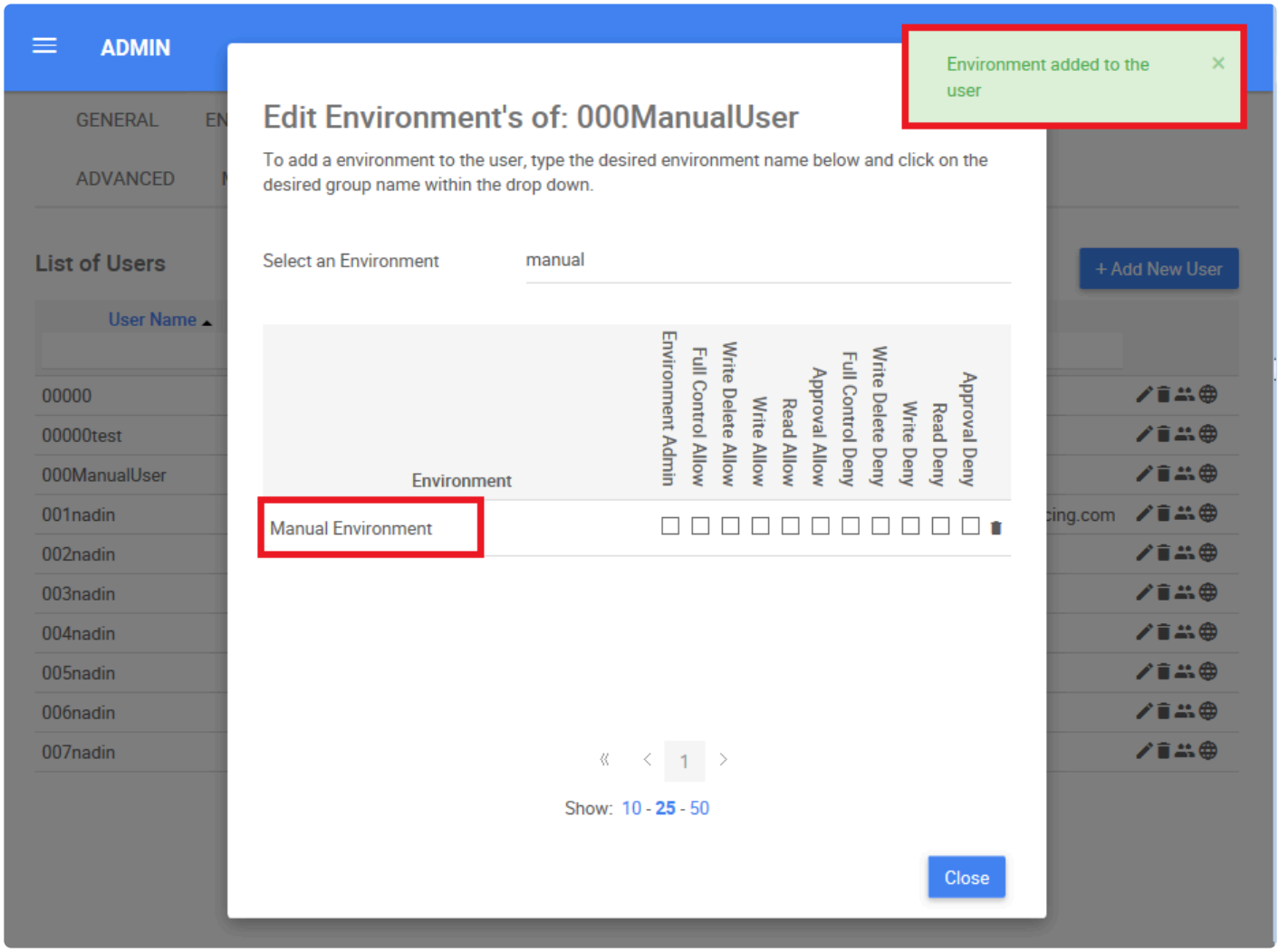


3. Type the name of the Environment you want to add to the User. “Double Click” on the environment to finish adding it



4. The added Environment will appear on the following table. The system admin will receive an automatic notification when the Environment is successfully added

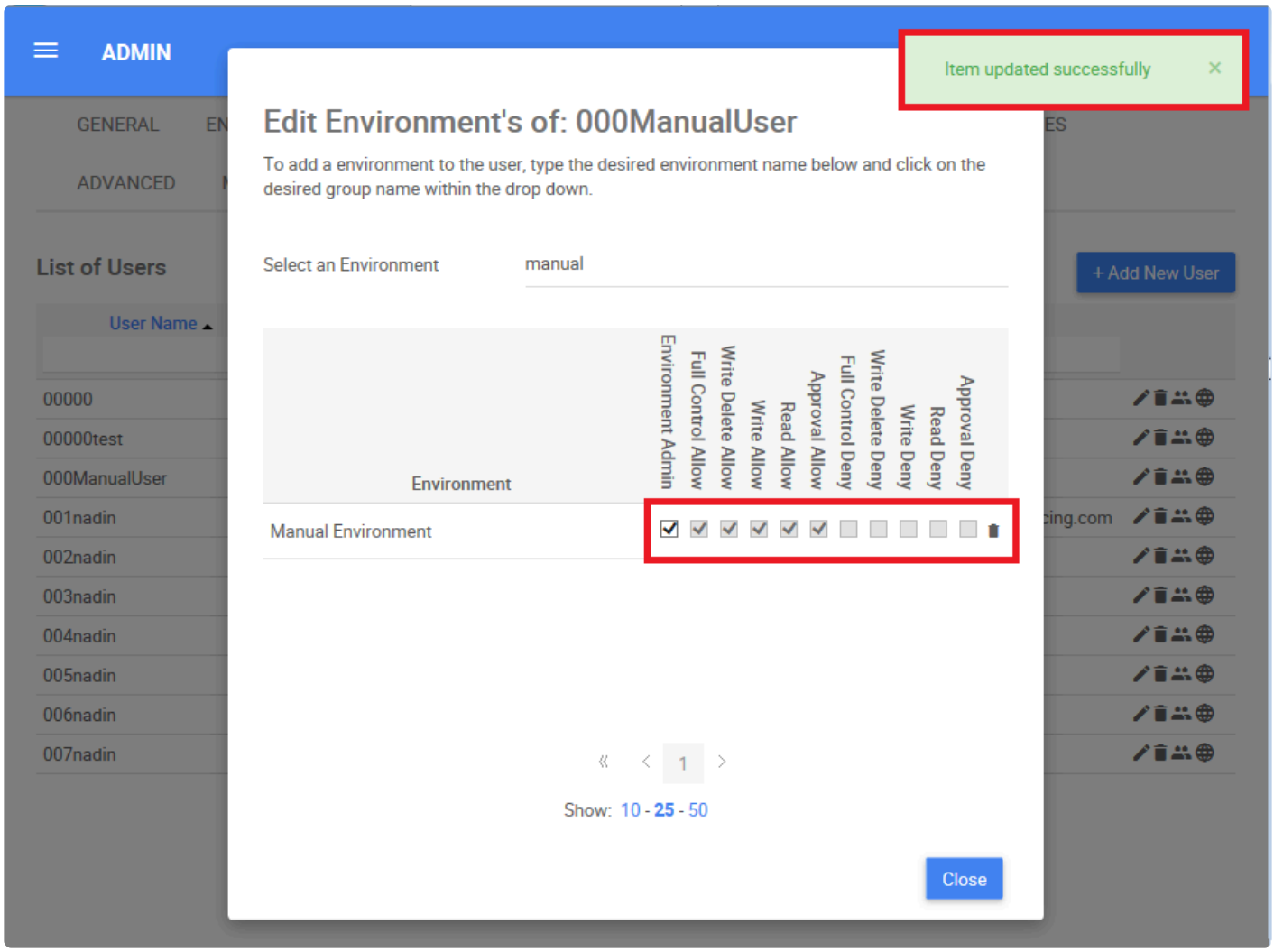
> ! This process may take a minute or two to be completed



5. Add the Level of Security for the 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

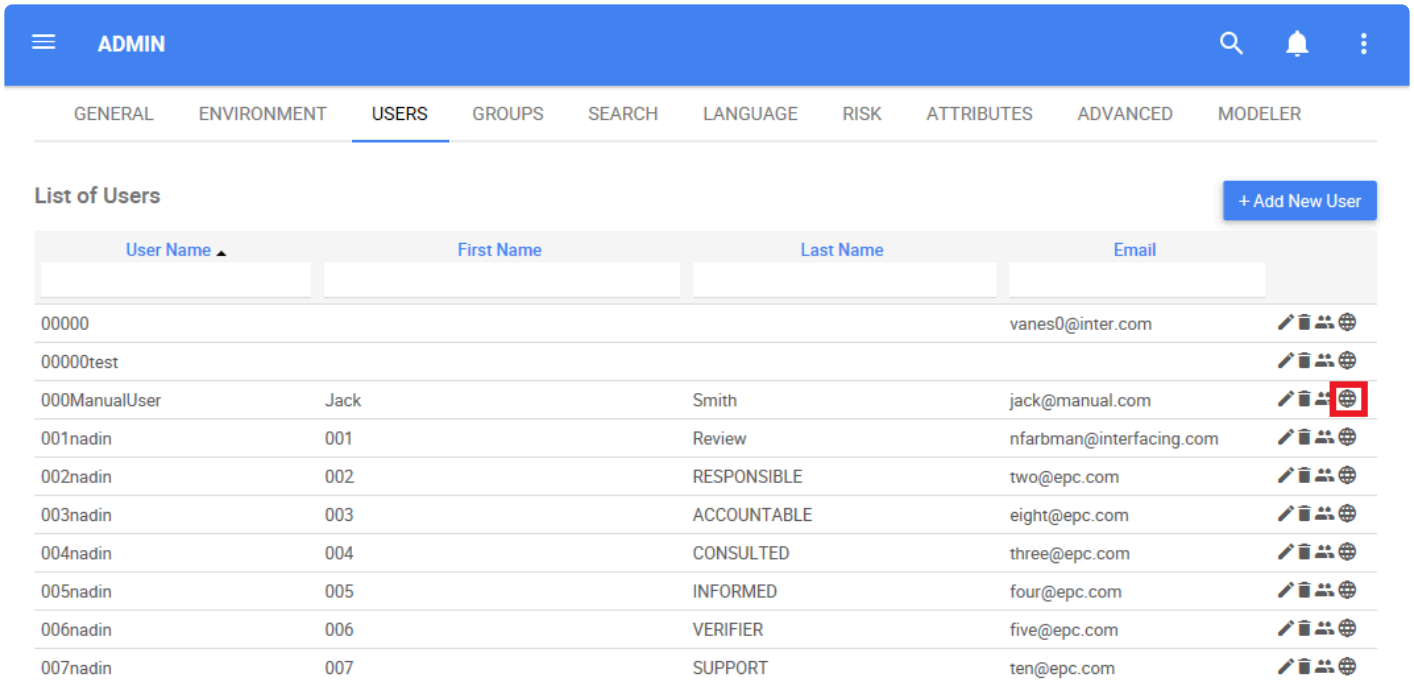
Level of Security	Details
Environment admin	User has full control of the environment as well as access to the Environment Admin section
Full Control Allow	User has full control of the environment
Write Delete Allow	User is allowed to write and delete on the environment
Write Allow	User is allowed to 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

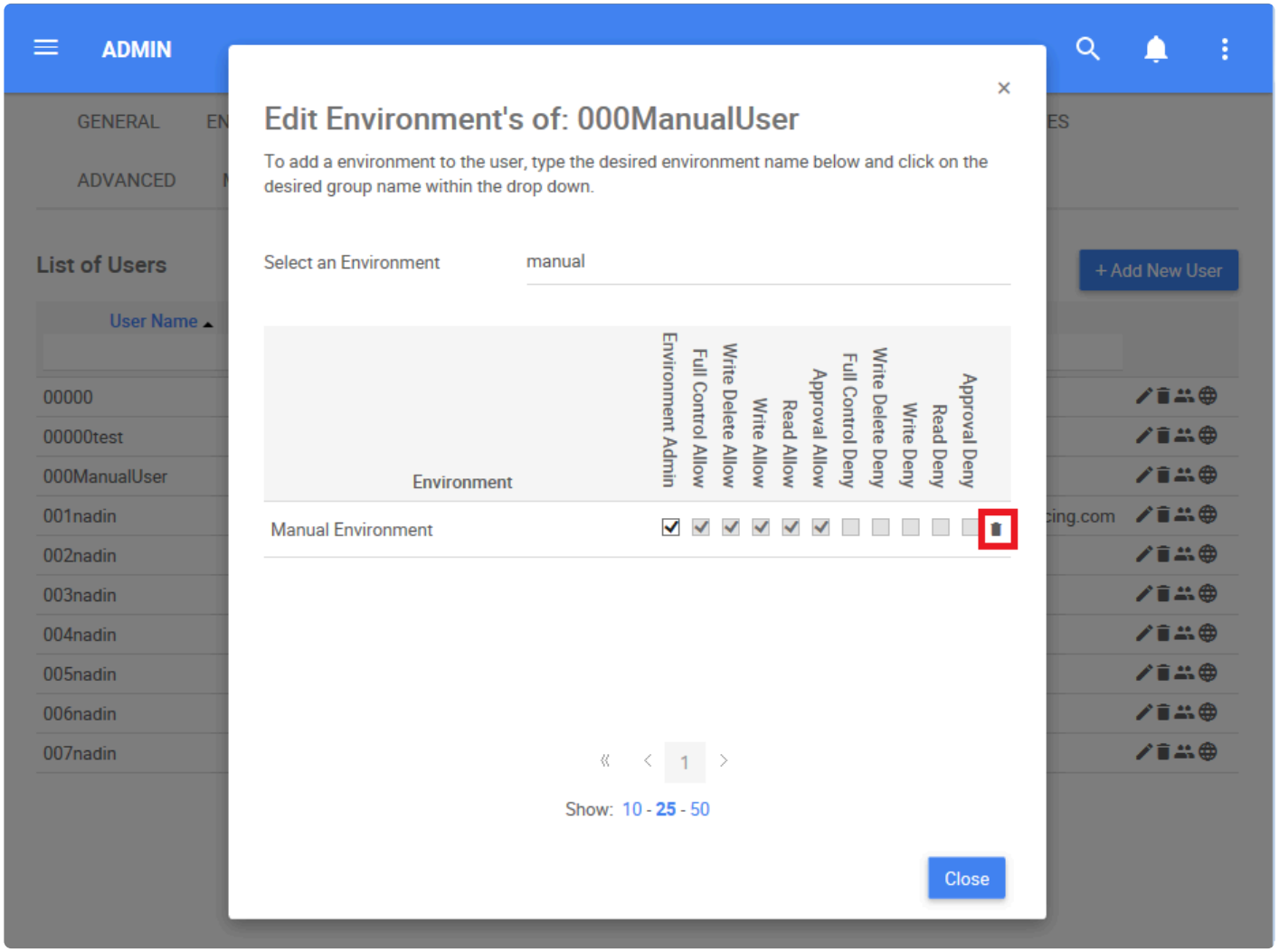


How to Remove an Environment from a User

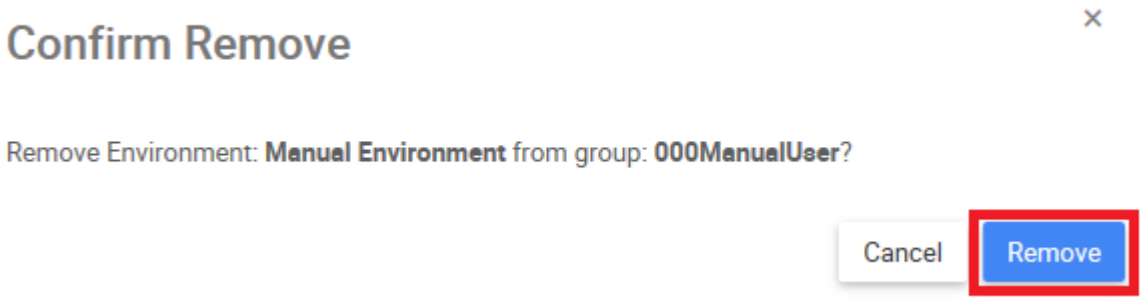
1. Navigate the cursor and select the icon for the User you want to remove an Environment from



2. Navigate the cursor and select the icon



3. The following box will appear, select the “Remove” box to remove an environment from a User



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
Show Latest Allow	User is allowed to view latest and published content in 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
Show Latest Deny	User is denied to view the latest content in 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

2. Full Control Allow

3. Write Delete Allow

4. Write Allow

5. Read Allow

6. Approval Allow

Approval Deny	☐
Read Deny	☐
Write Deny	☐
Write Delete Deny	☐
Full Control Deny	☐
Approval Allow	☑
Read Allow	☑
Write Allow	☐
Write Delete Allow	☐
Full Control Allow	☐
Environment Admin	☐

7. Full Control Deny

Approval Deny	☑
Read Deny	☑
Write Deny	☑
Write Delete Deny	☑
Full Control Deny	☑
Approval Allow	☐
Read Allow	☐
Write Allow	☐
Write Delete Allow	☐
Full Control Allow	☐
Environment Admin	☐

8. Write Delete Deny

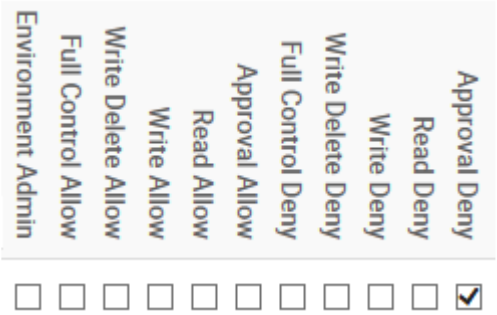
Approval Deny	☑
Read Deny	☑
Write Deny	☑
Write Delete Deny	☑
Full Control Deny	☐
Approval Allow	☐
Read Allow	☐
Write Allow	☐
Write Delete Allow	☐
Full Control Allow	☐
Environment Admin	☐

9. Write Deny

Approval Deny	☐
Read Deny	☐
Write Deny	☑
Write Delete Deny	☑
Full Control Deny	☐
Approval Allow	☐
Read Allow	☐
Write Allow	☐
Write Delete Allow	☐
Full Control Allow	☐
Environment Admin	☐

10. Read Deny

11. Approval Deny



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

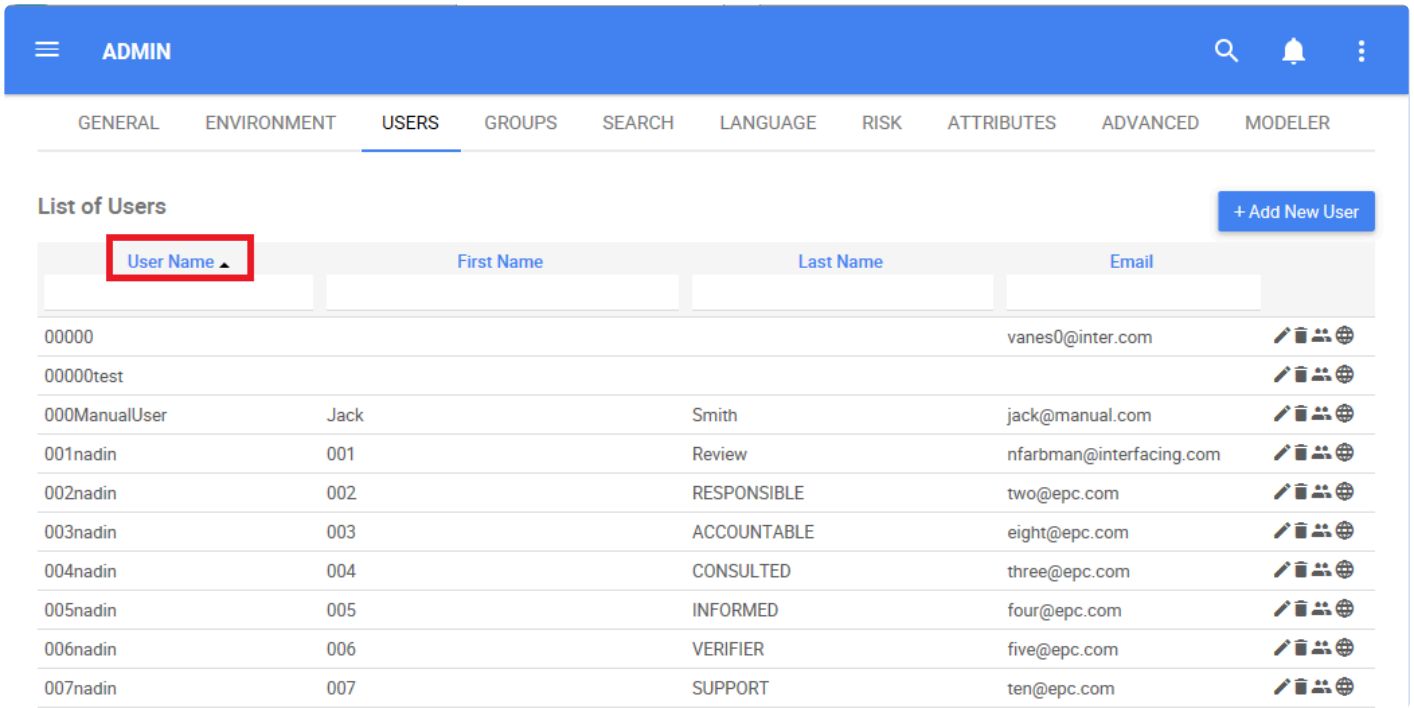
1. Navigate to the System Admin section

2. Navigate the User Tab

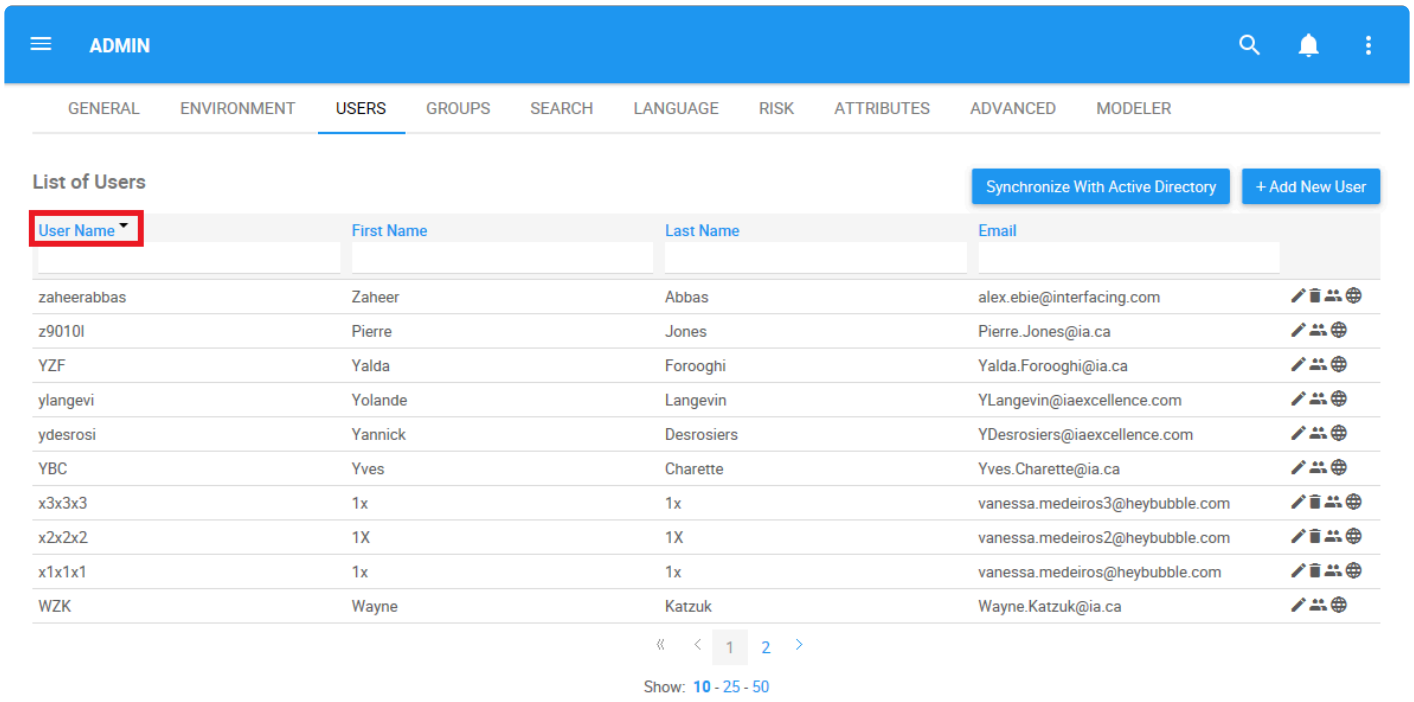
3. Click on the **User Name**

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".



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



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:

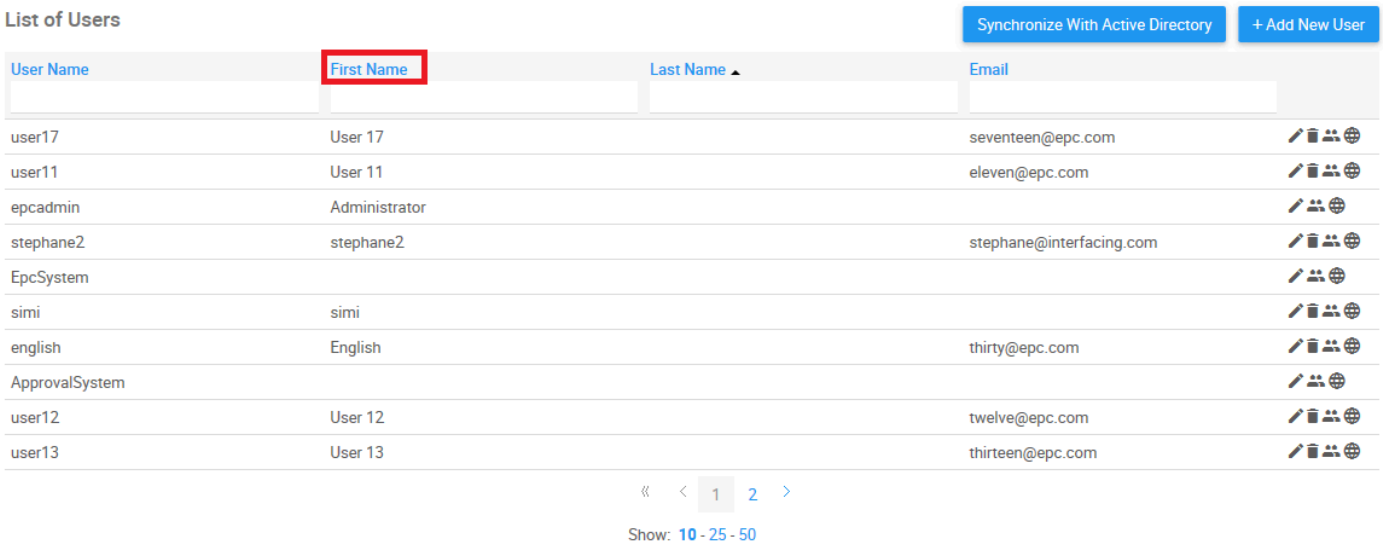
1. How to Add Filters
2. How to Remove Filters
3. How to Combine Filters

10.3.8.1 Add Filter

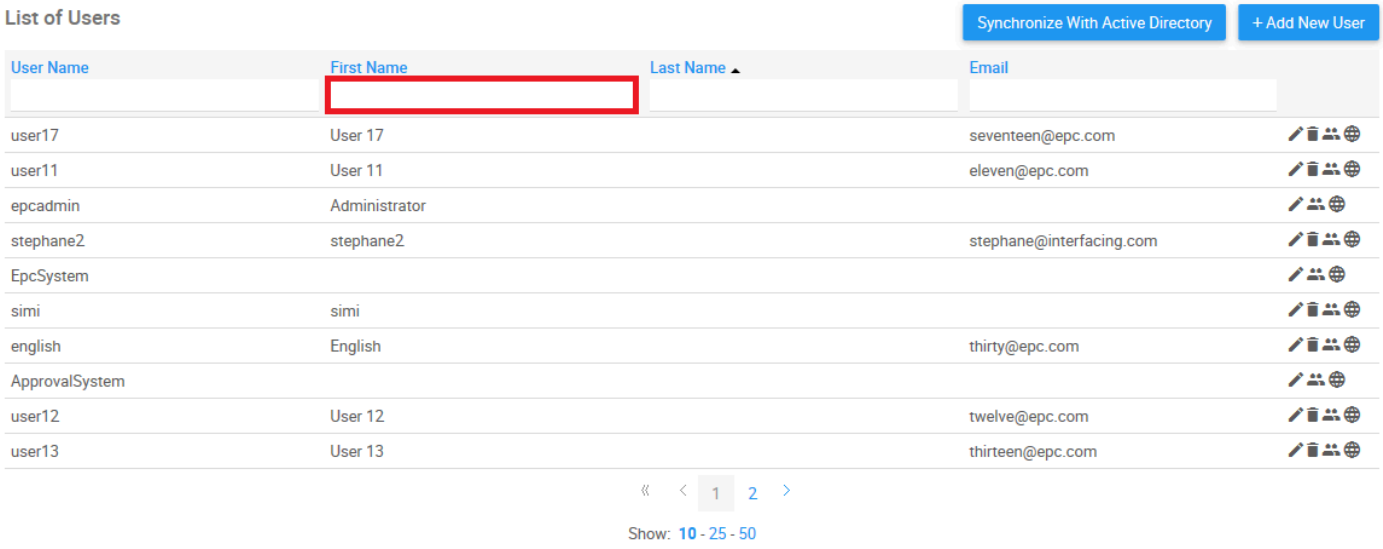
System Admins can add filters to see the items of its choice. **Type** what you are looking for to filter the list

How to Add Filter

1. Navigate cursor and select the box column you wish to filter. For this example, we will use “First Name”



2. Type the word you are looking for to filter the list on the search box and click on “enter”



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 ×			
lmdrvf	Yassine	Abrougui	Yassine.Abrougui@ia.ca	
lmdrvy	Yassine	Alahyane	Yassine.Alahyane@ia.ca	
lmphtf	Yalda	Arzani		
lkirgz	Lyane	Charron	Lyane.Charron@ia.ca	
lncsdl	Tanya	De Medeiros	Tanya.DeMedeiros@ia.ca	
ydesrosi	Yannick	Desrosiers	YDesrosiers@iaexcellence.com	
YZF	Yalda	Forooghi	Yalda.Forooghi@ia.ca	
lnirst	Yanela	Guzman		
lncsdq	Dallya	Ho	Dallya.Ho@ia.ca	
lmphbc	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.

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.

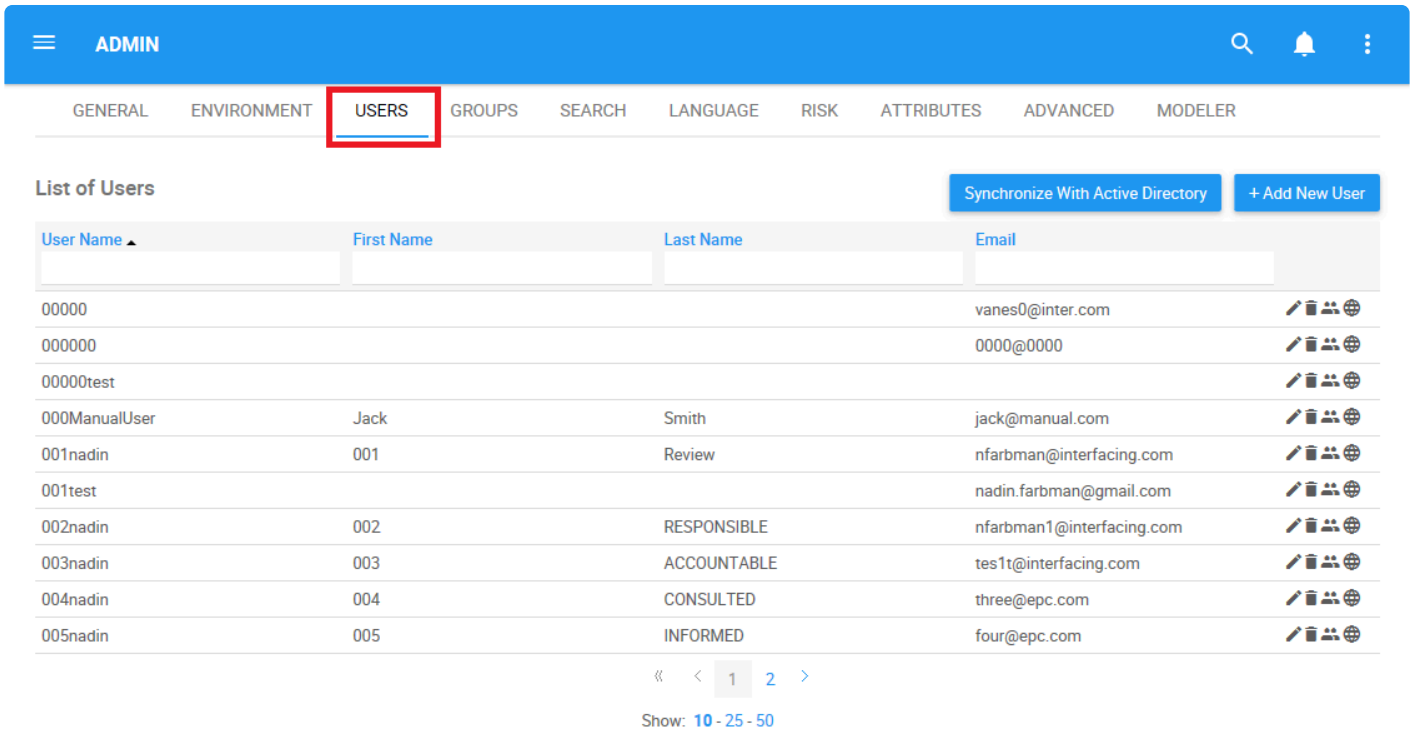
! This is **only** available if the organization uses Microsoft's Active Directory and they have the license to use it on EPC

The Synchronize With Active Directory icon will only be visible if the organization requested the Active Directory licence

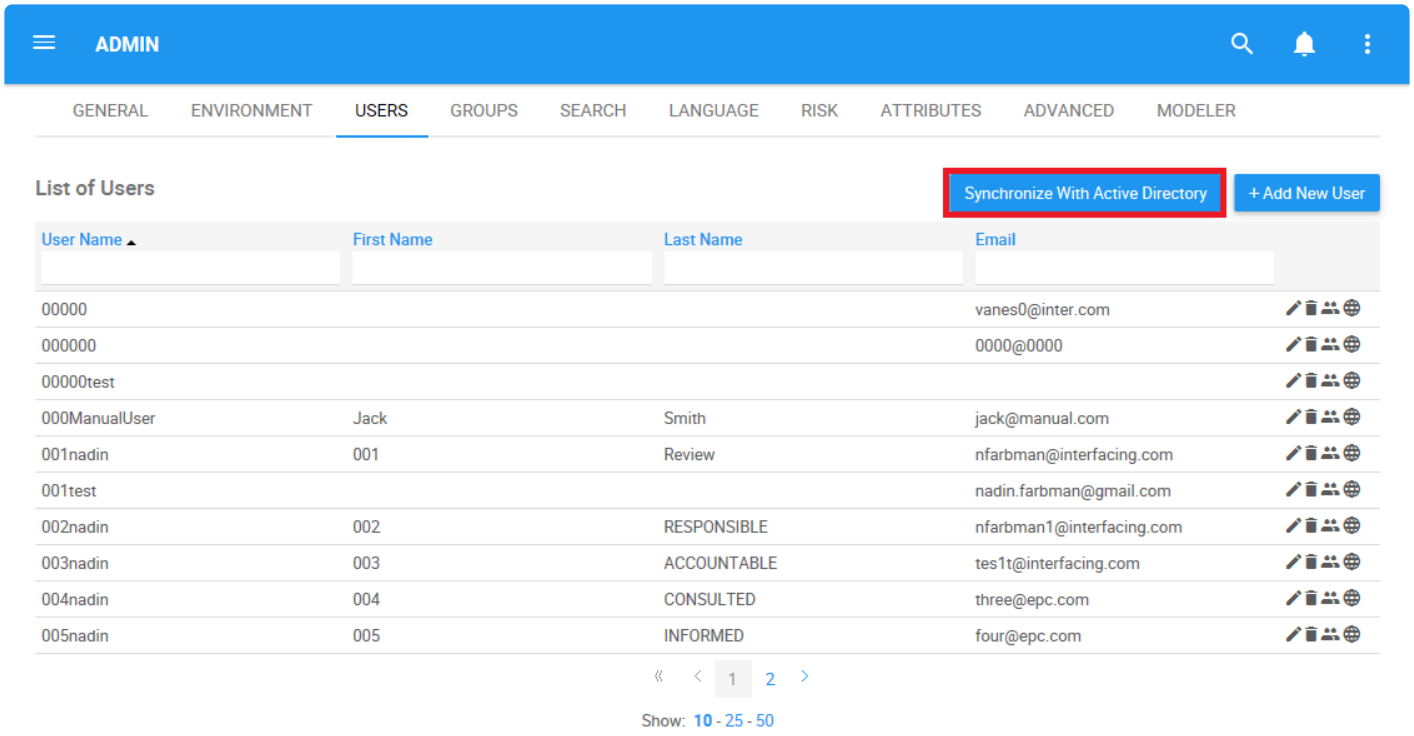
To Synchronize with Active Directory, follow the next steps

1. Navigate to the System Admin section

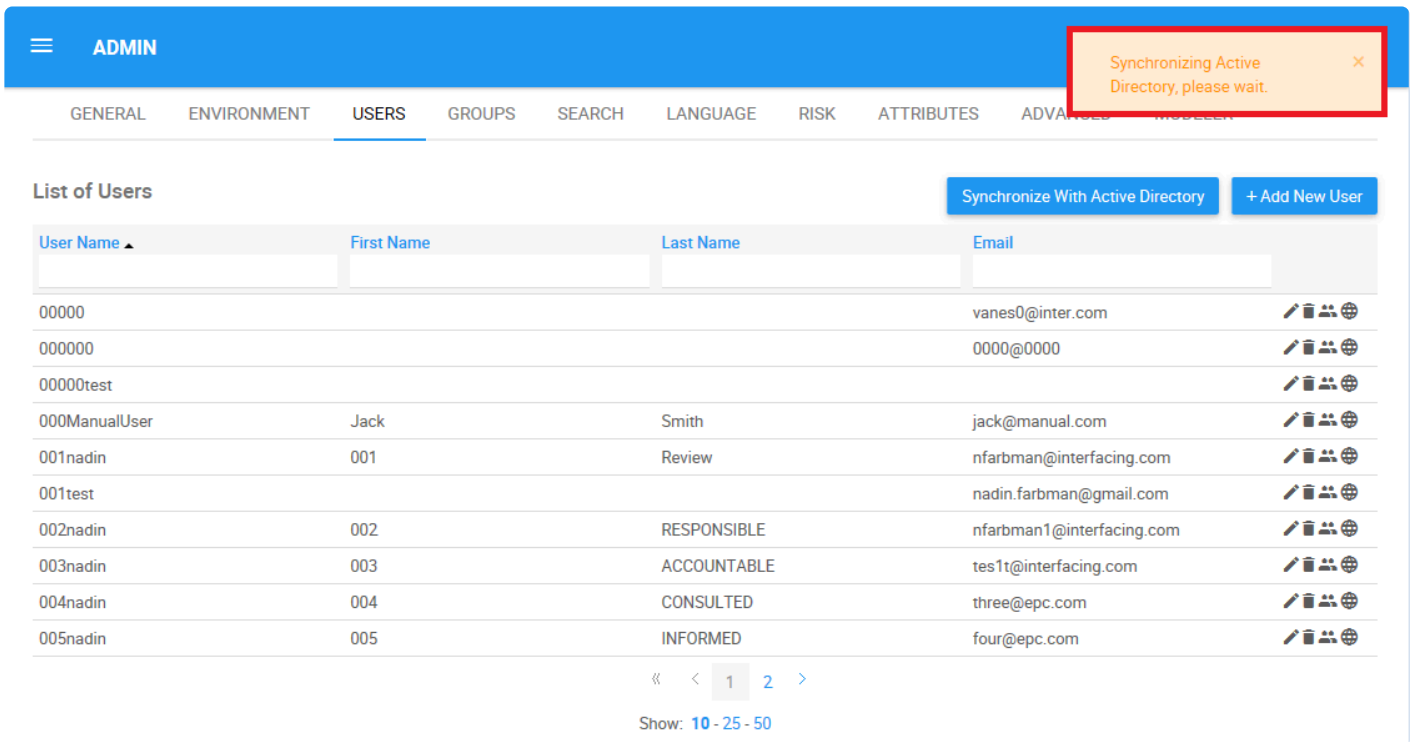
2. Select the Users tab within the System Admin Section



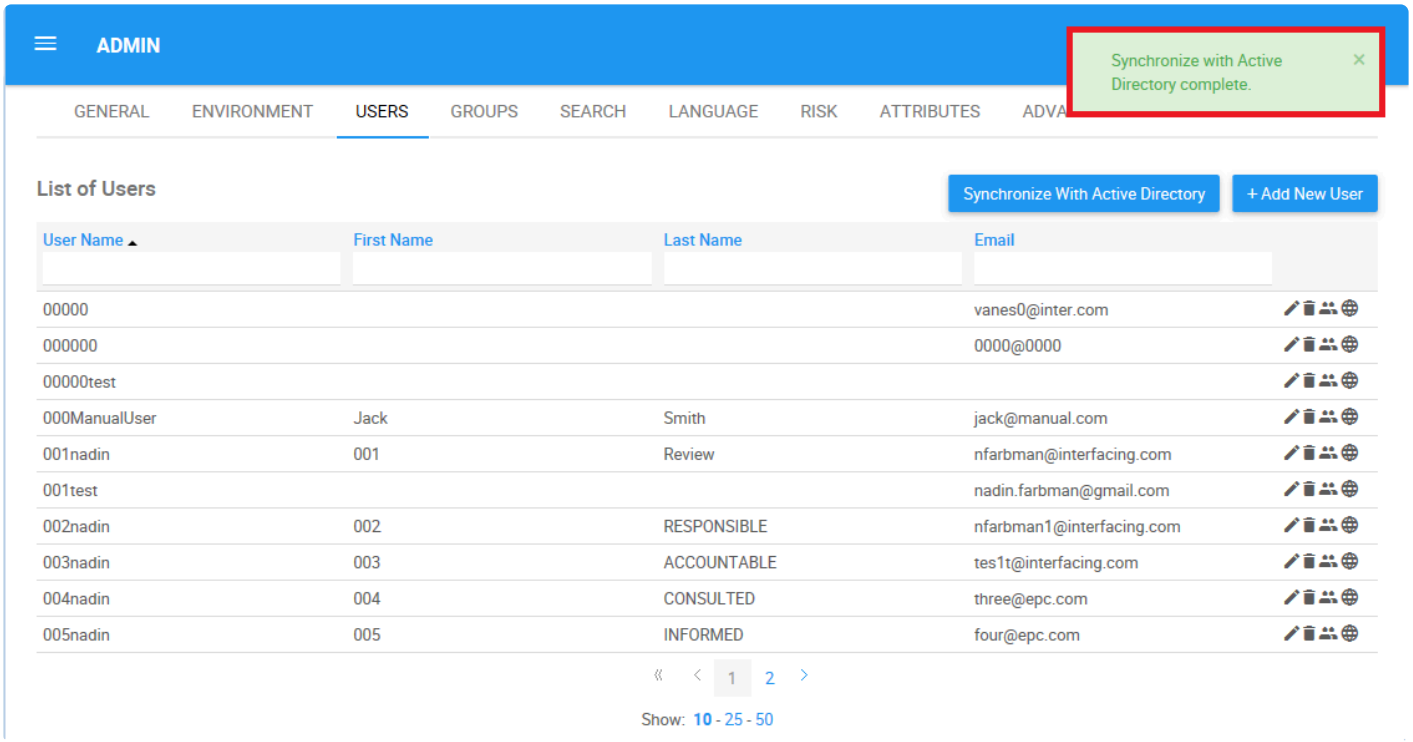
3. Click on the Synchronize With Active Directory icon to Synchronize with Active Directory



4. System Admin will first receive a red notification saying the synchronization is in process



5. System Admin will receive a second notification in green saying the synchronization is complete


ADMIN
Synchronize with Active Directory complete.
GENERAL
ENVIRONMENT
USERS
GROUPS
SEARCH
LANGUAGE
RISK
ATTRIBUTES
ADVA
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

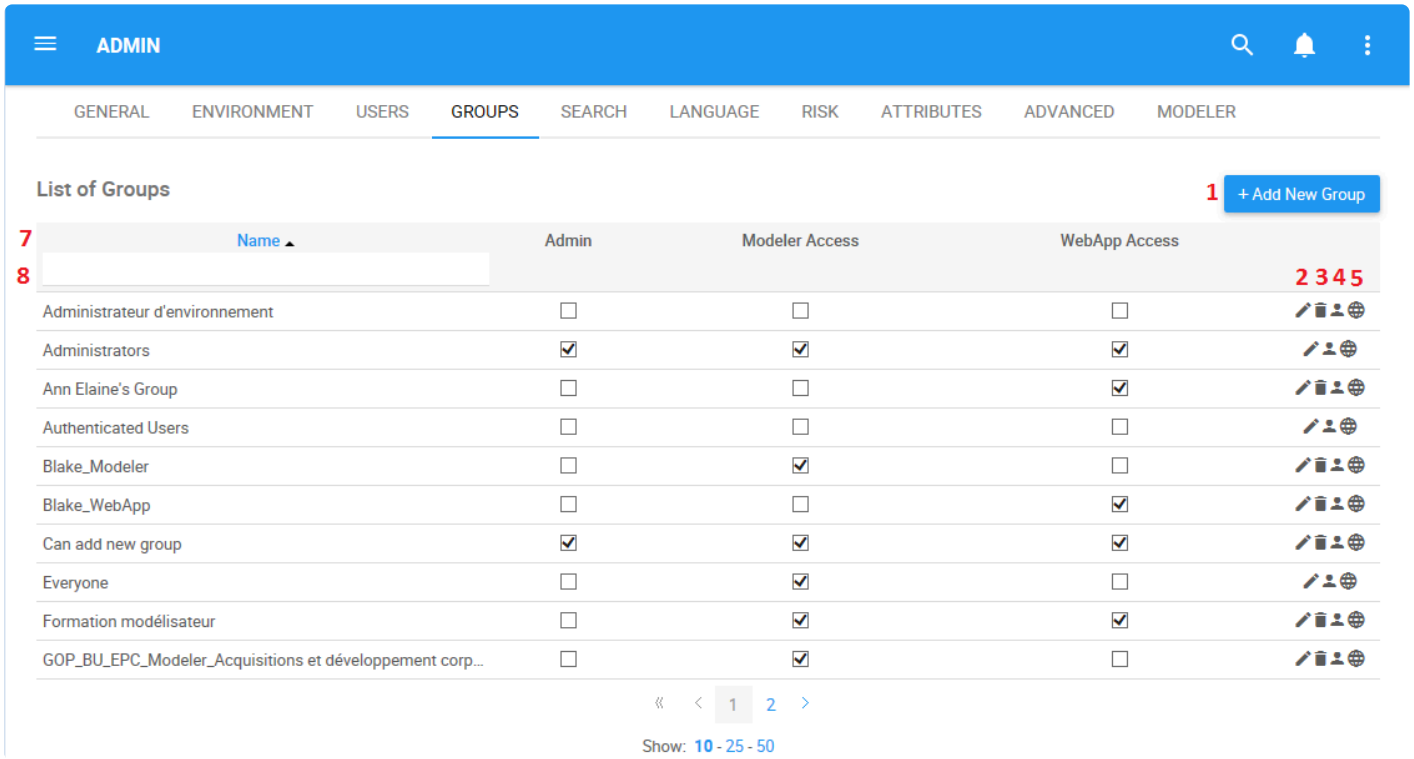
© 2020 Interfacing Technologies Corporation

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



10.4.1 Add Group

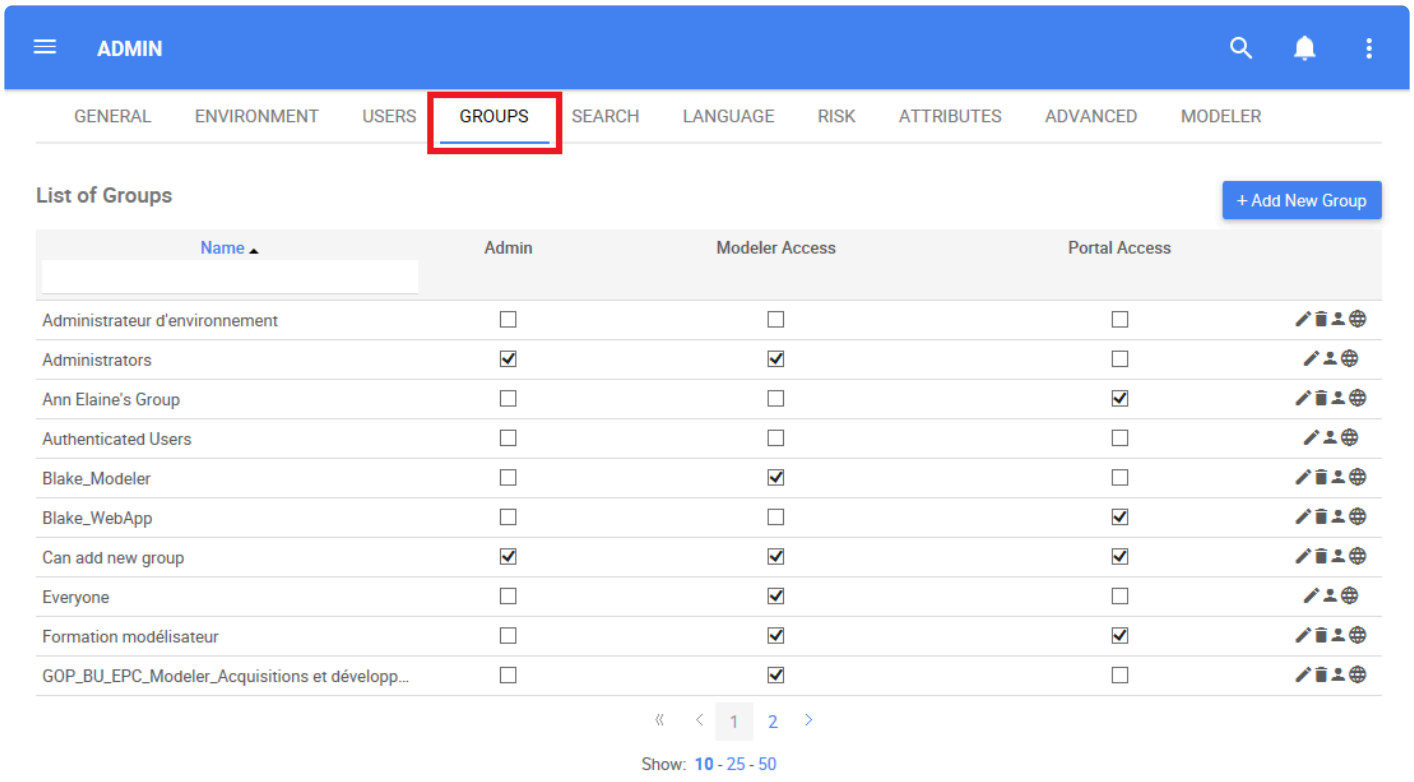
Under the Group tab, System Admins are responsible to create groups and assign the users that will have access to the group

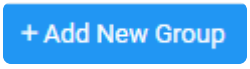
How to Add a Group

1. Login to the EPC

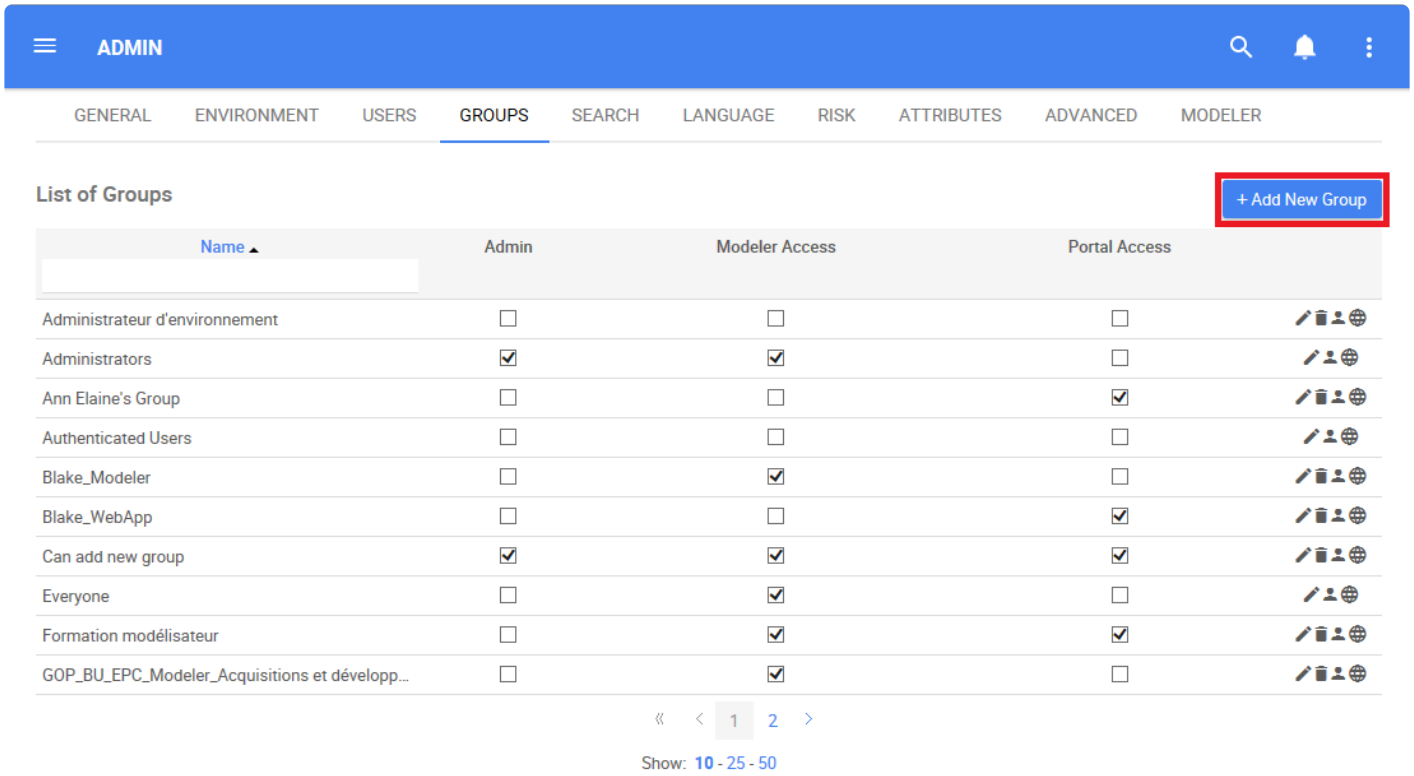
2. Navigate to the System Admin Section

3. Select the Environment tab within the System Admin Section. You will be navigated to the Environment management page.

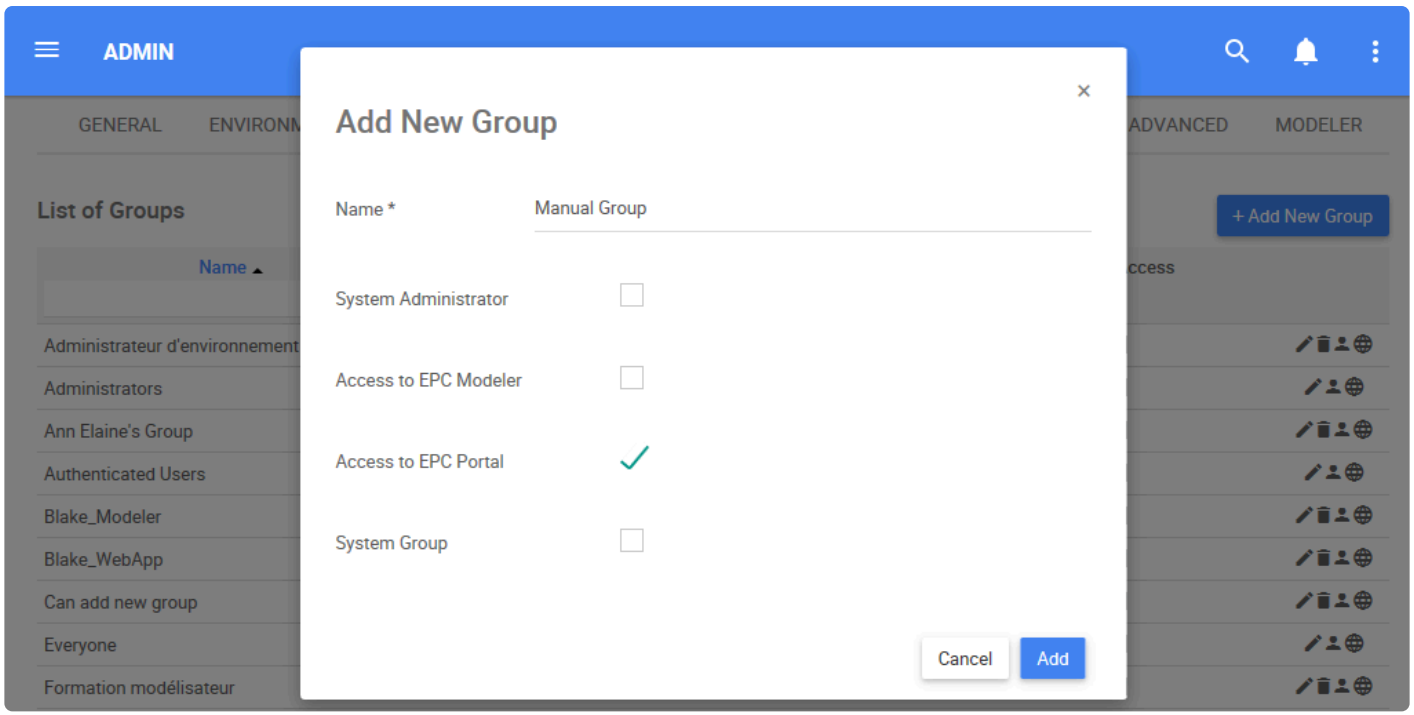


4. Navigate the cursor and select the 

box



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



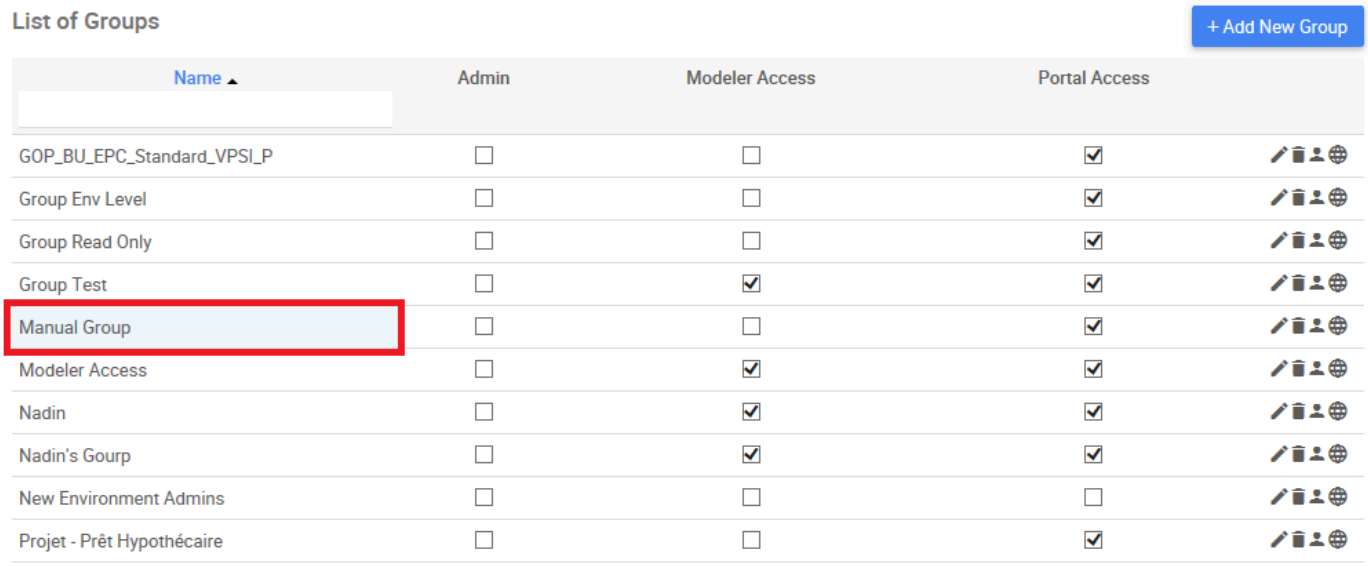
6. Populate the profile with the appropriate information and then select the Add button and the Group will be added to the EPC.

10.4.2 Edit Existing Group

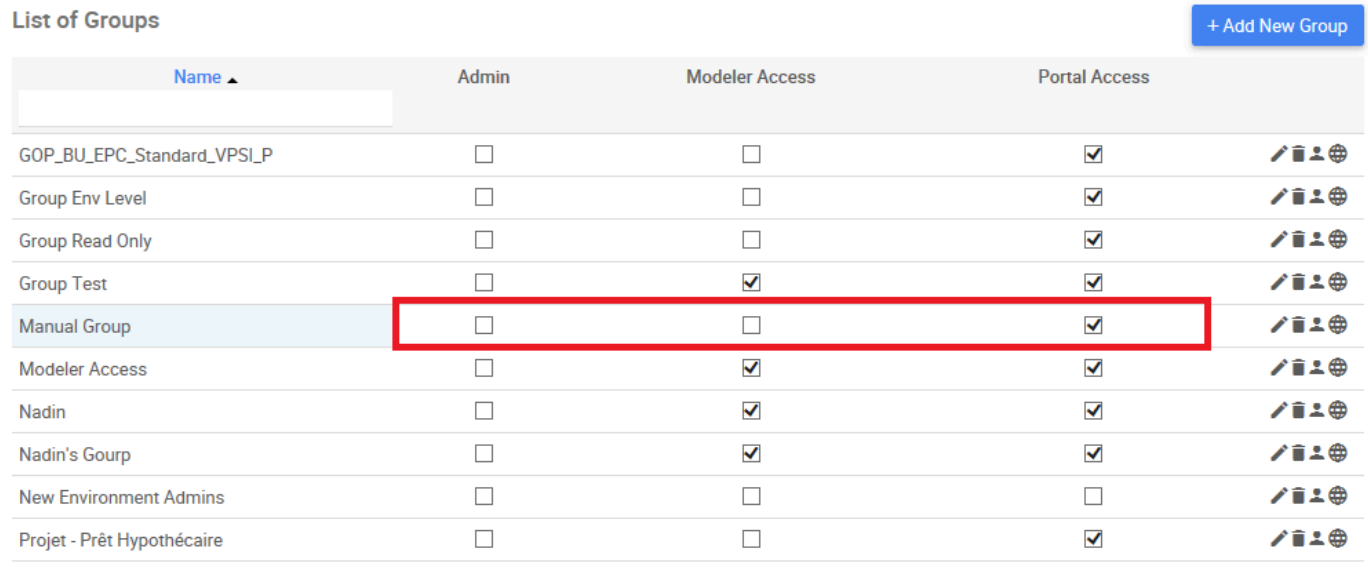
When needed, administrators can edit the Group information. System Admins can perform in-line edits for information displayed in the group list, or can navigate to the edit section for further editing capabilities.

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

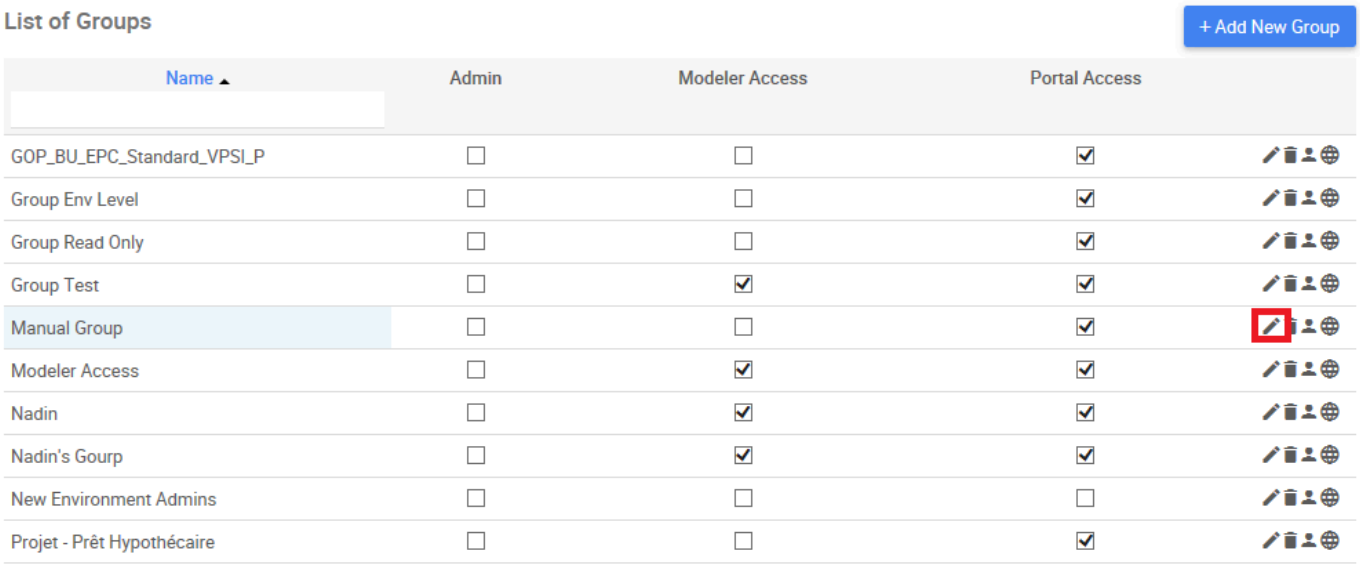


In line edits can also be performed to choose the level of access for the group. Simply check the icons ☐ ☑ for the level of access you desire to add or remove to or from the Group.

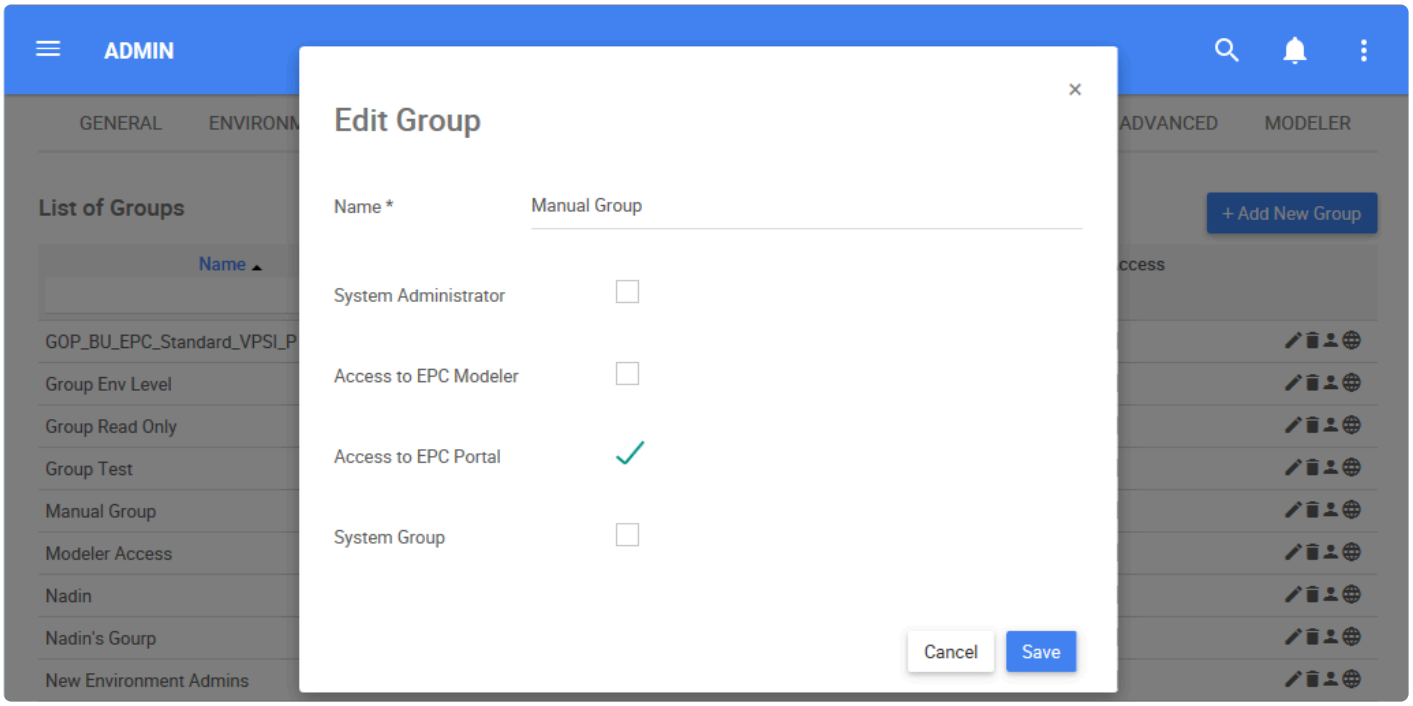


Editing Window

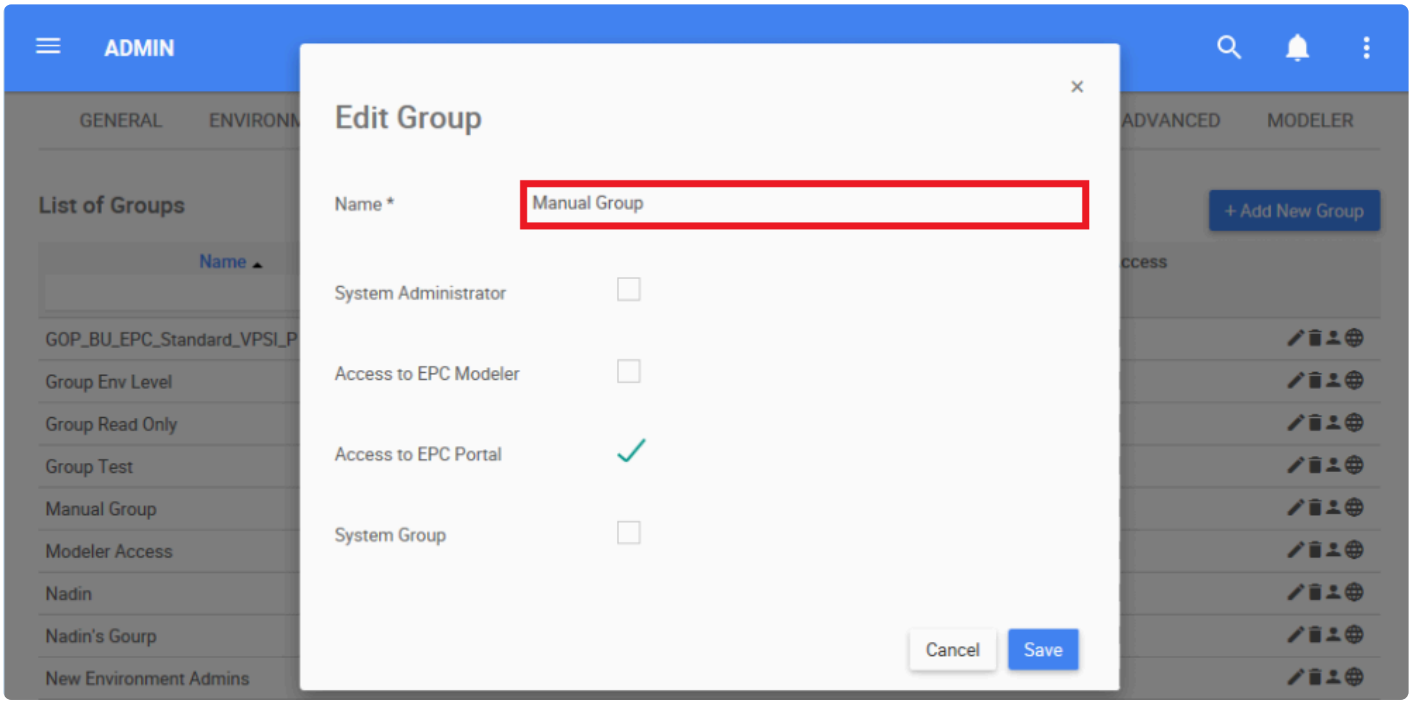
1. For further editing capabilities, navigate the cursor and select the icon featured on the right hand-side of each user.



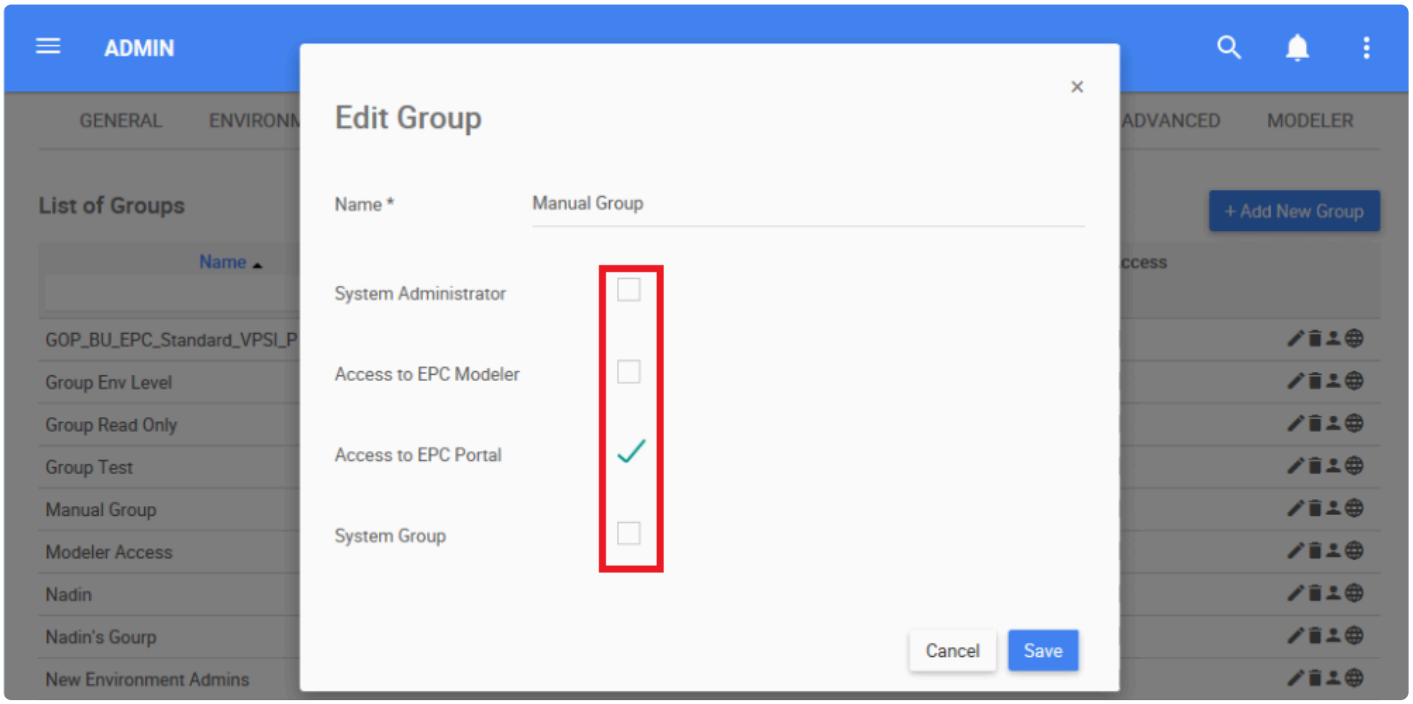
2. Selecting this item will re-open the full Group editing page.



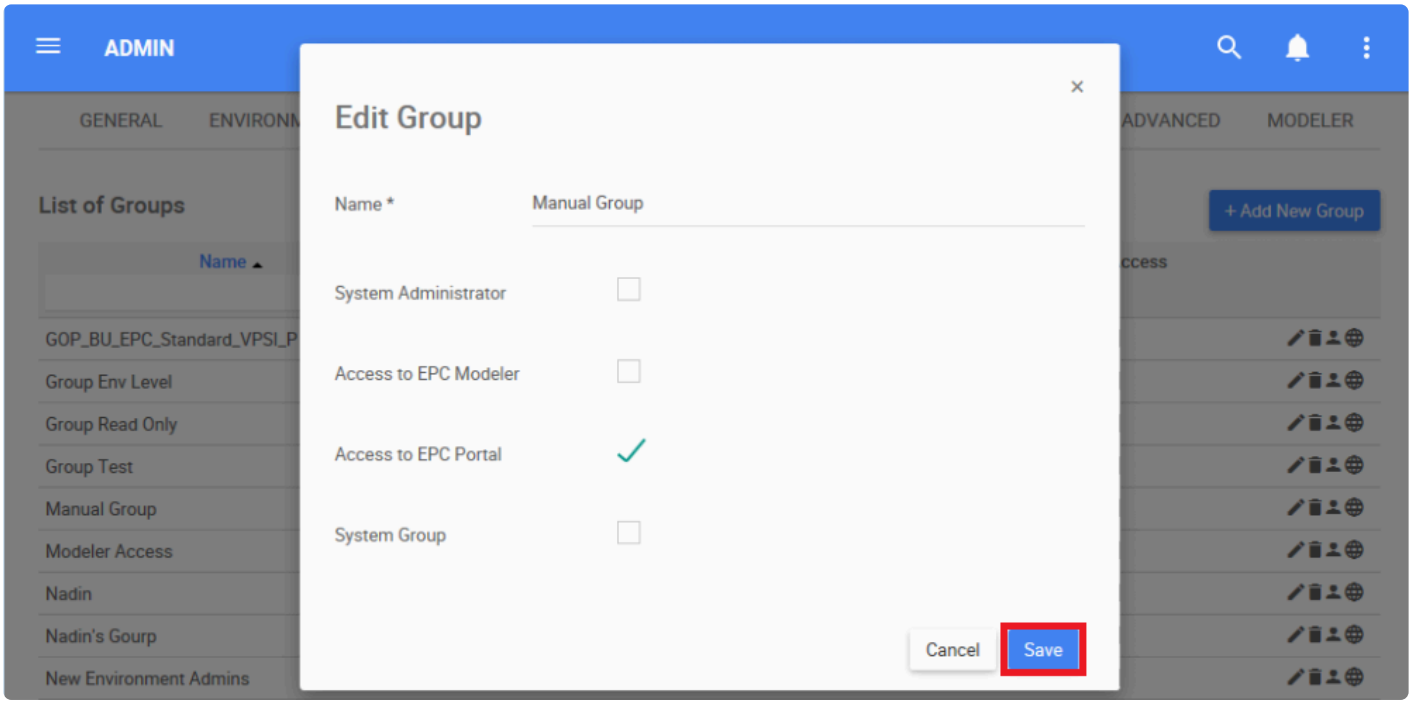
3. Click on the “Name box” and edit the name of the environment



4. Check the icons ☐ ☑ for the level of access you desire to edit



4. Select the “Save” button to confirm changes

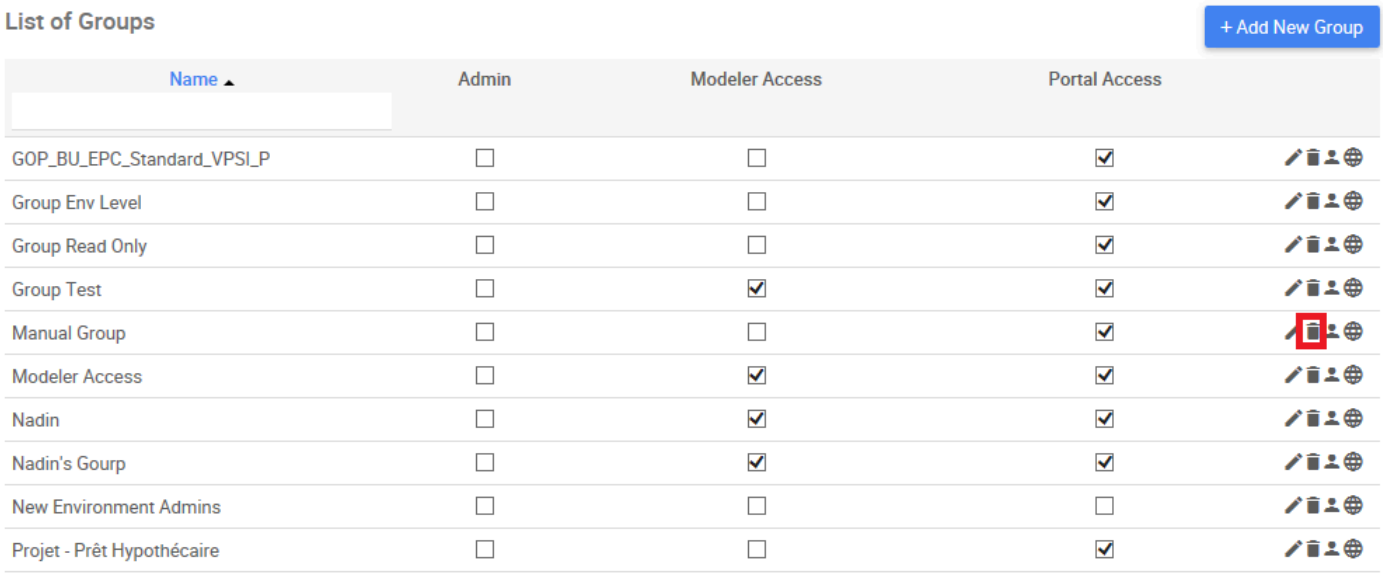

ADMIN
GENERAL
ENVIRONM
ADVANCED
MODELER
List of Groups
+ Add New Group
Name
ccess
GOP_BU_EPC_Standard_VPSI_P
Group Env Level
Group Read Only
Group Test
Manual Group
Modeler Access
Nadin
Nadin's Gourp
New Environment Admins
Edit Group
Name *
Manual Group
System Administrator
Access to EPC Modeler
Access to EPC Portal
System Group
Cancel
Save

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



2. The following box will appear and you will be able to delete the Group by clicking on the “Delete” box

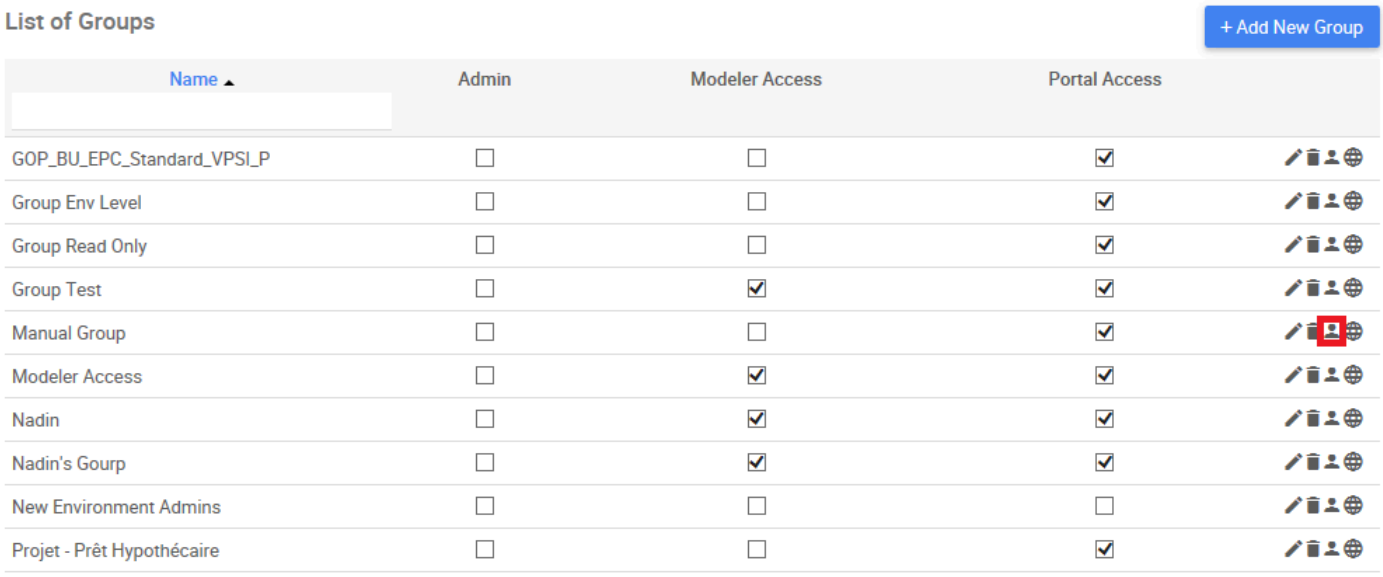
10.4.4 Add User to Group

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.

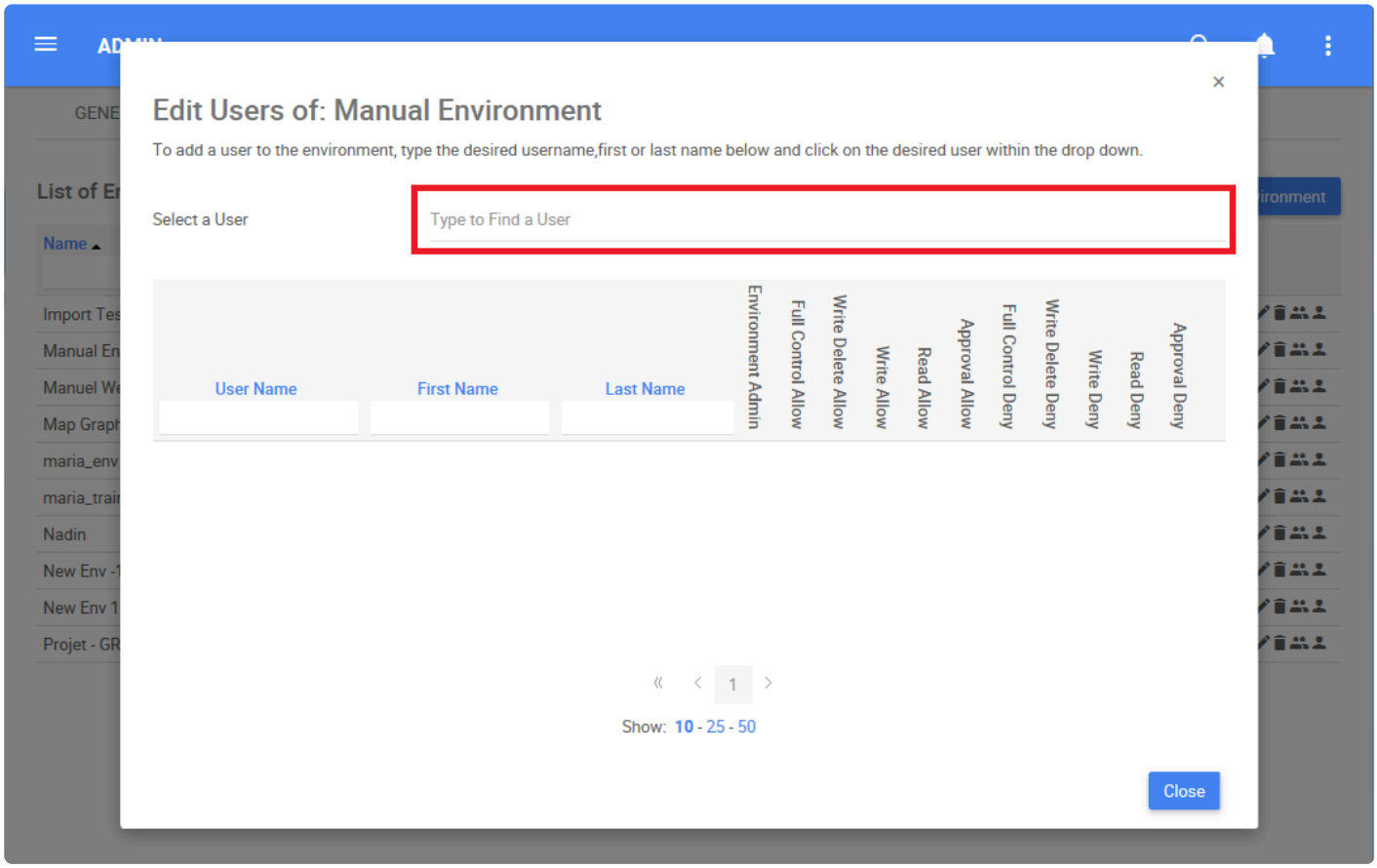
How to Add a User to a Group

1. Navigate the cursor and select the icon for the Group you want to add users to

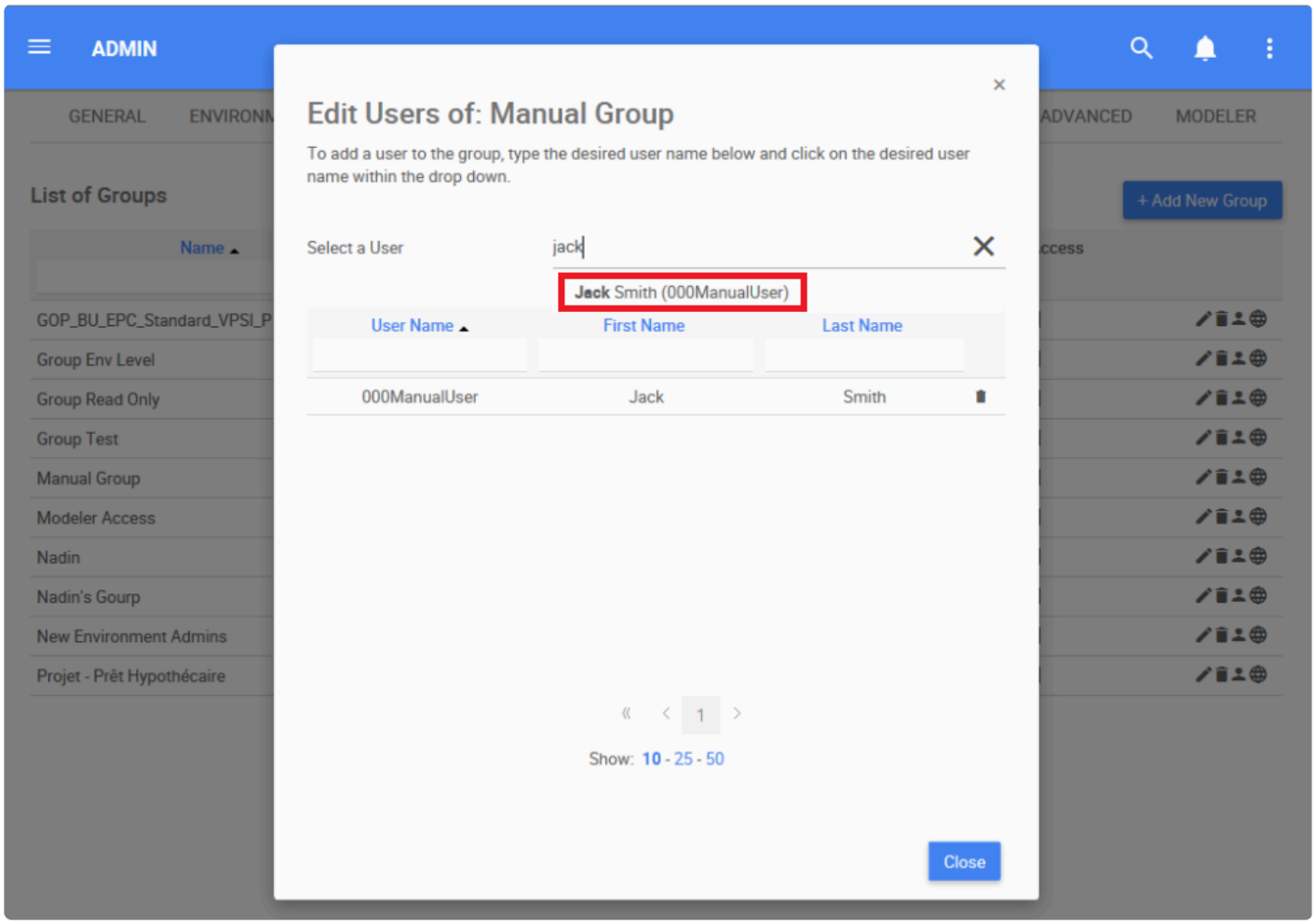


2. Navigate to the "Select a User" search box

> The list of groups will populate below based on key word typing

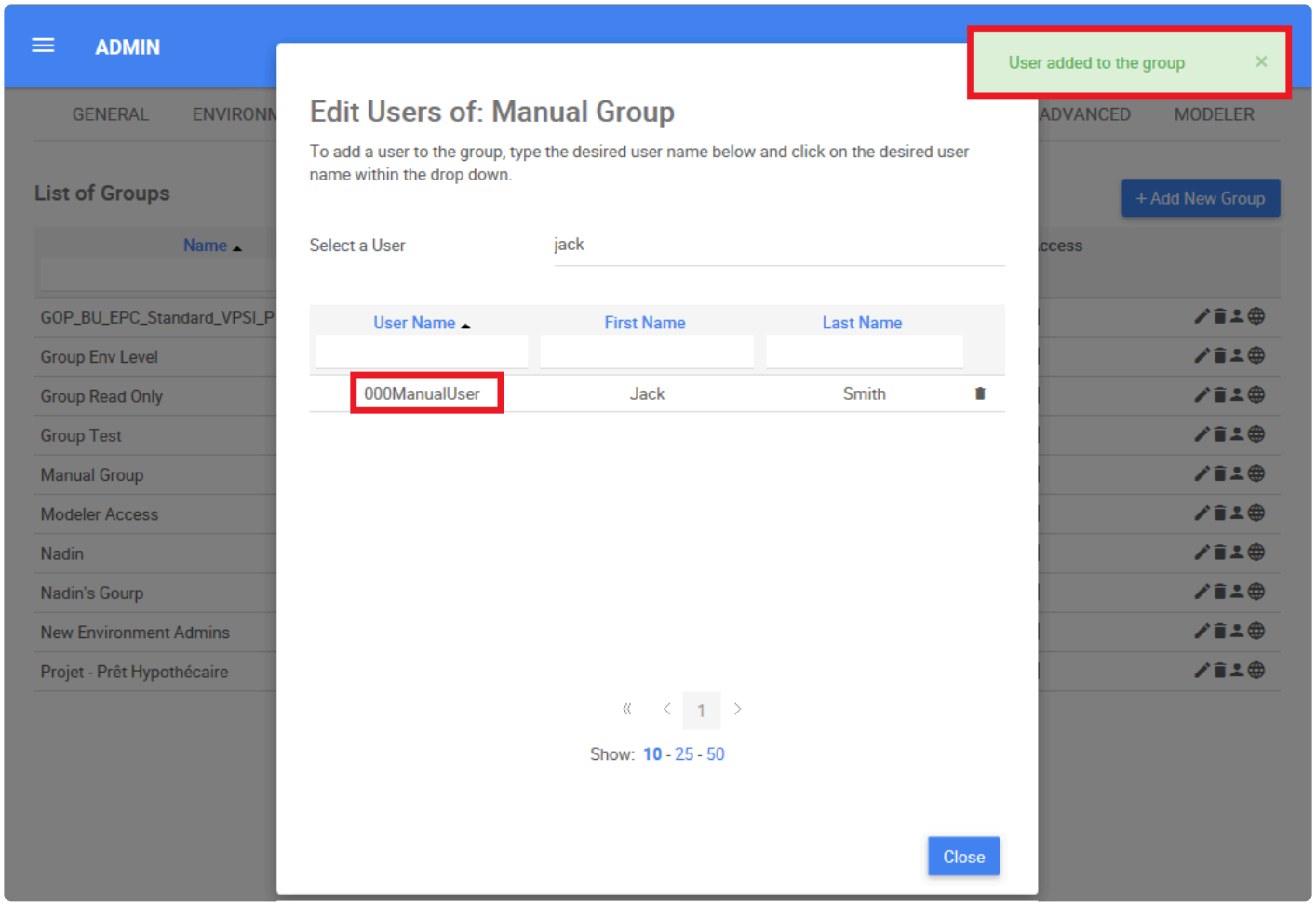


3. Type the name of the User you want to add to the environment. “Double Click” on the user to finish adding it



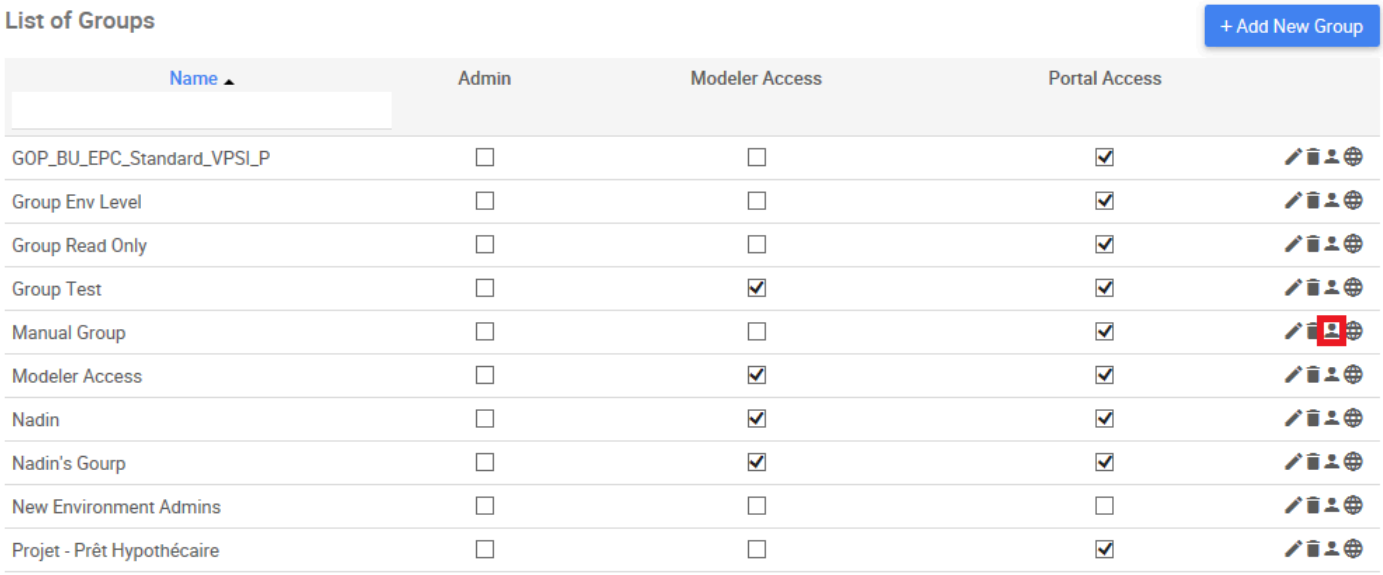
4. The added user will appear on the following table. The system admin will receive an automatic notification when the user is successfully added

> ! This process may take a minute or two to be completed

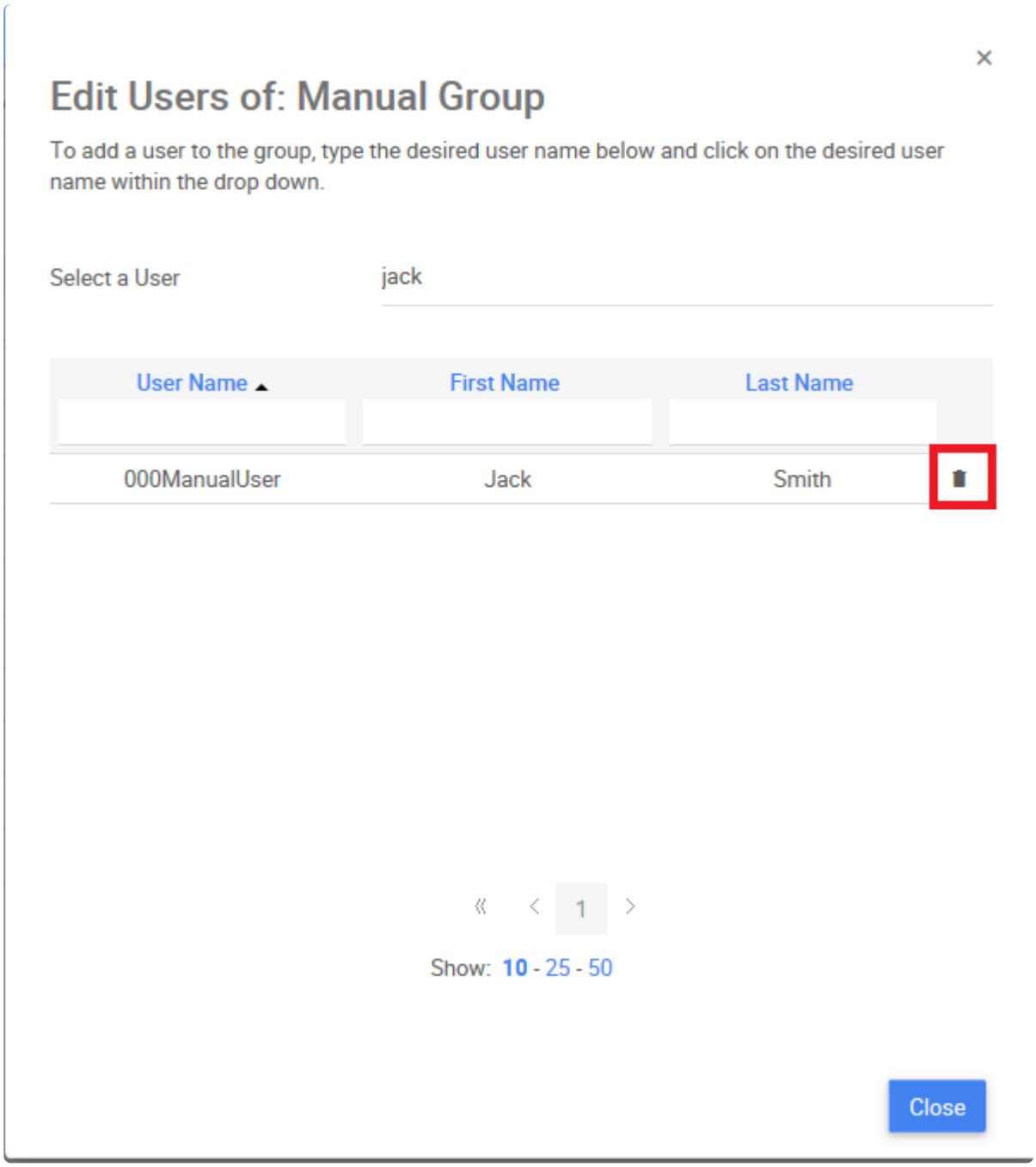


How to Remove a User from a Group

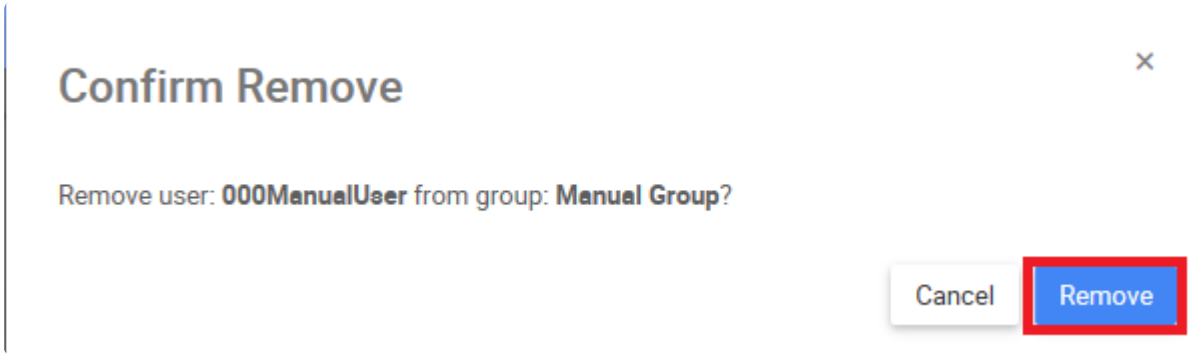
1. Navigate the cursor and select the icon for the environment you want to remove users from



2. Navigate the cursor and select the icon



3. The following box will appear, select the “Remove” box to remove an user from an environment



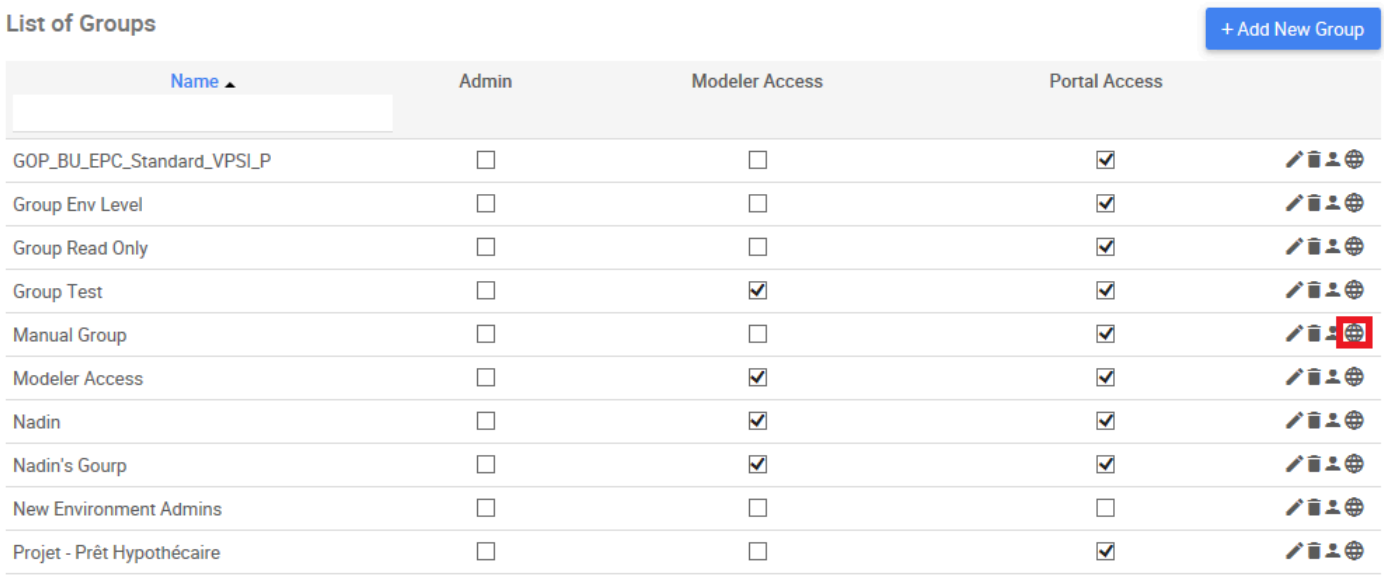
10.4.5 Add Environment to Group

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.

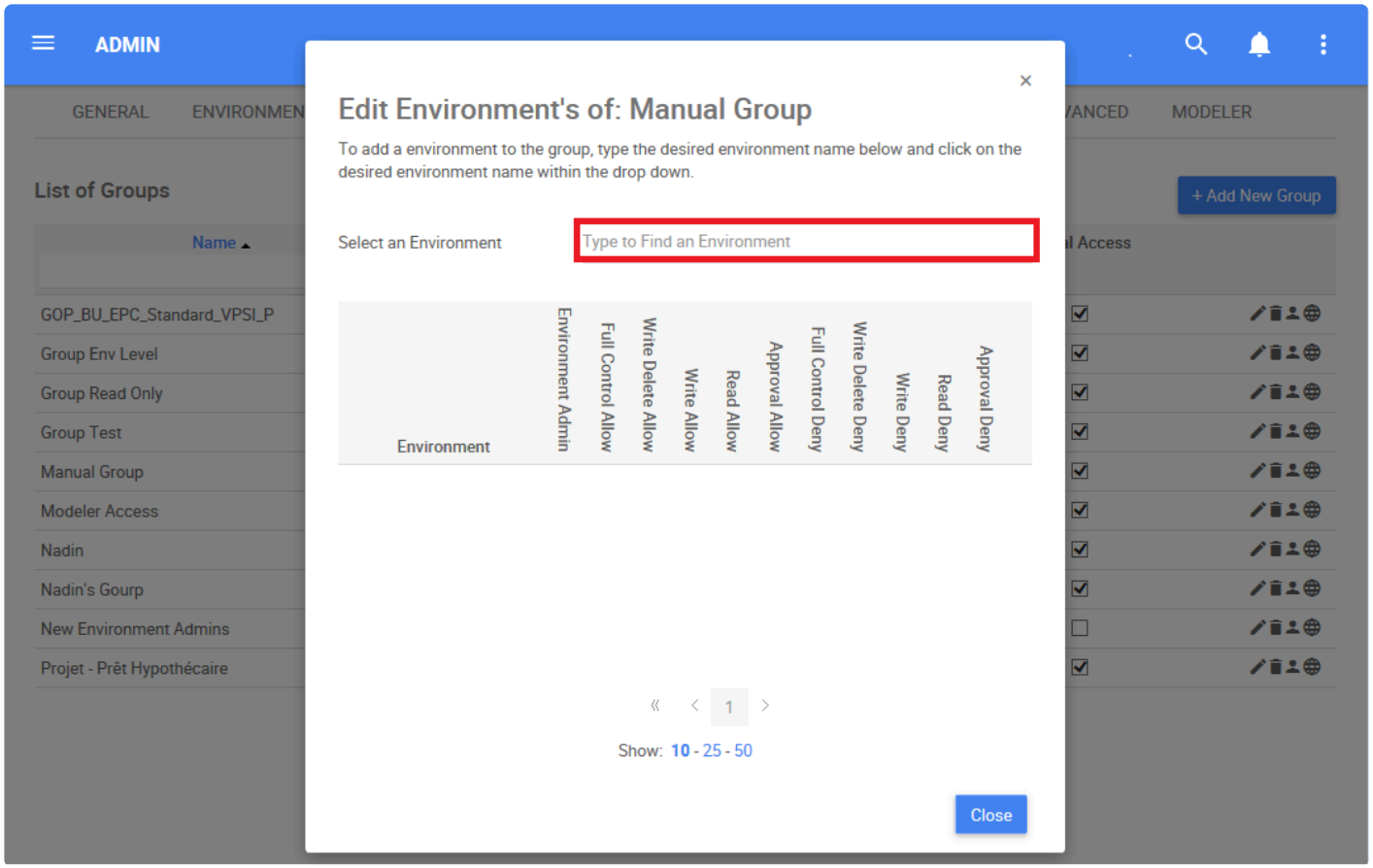
How to Add an Environment to a Group

1. Navigate the cursor and select the icon for the environment you want to add a group to

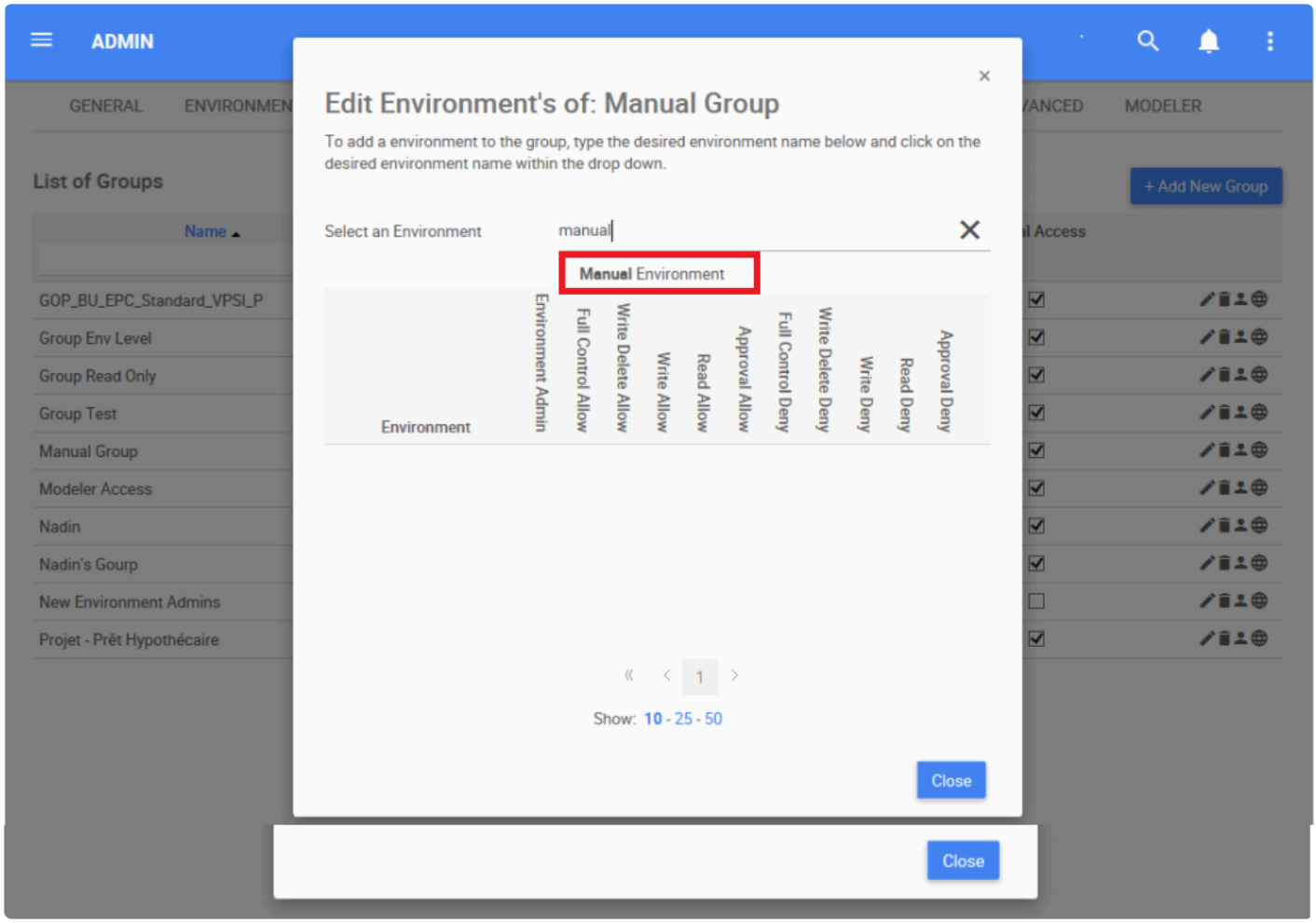


2. Navigate to the "Select an Environment" search box

> The list of environments will populate below based on key word typing

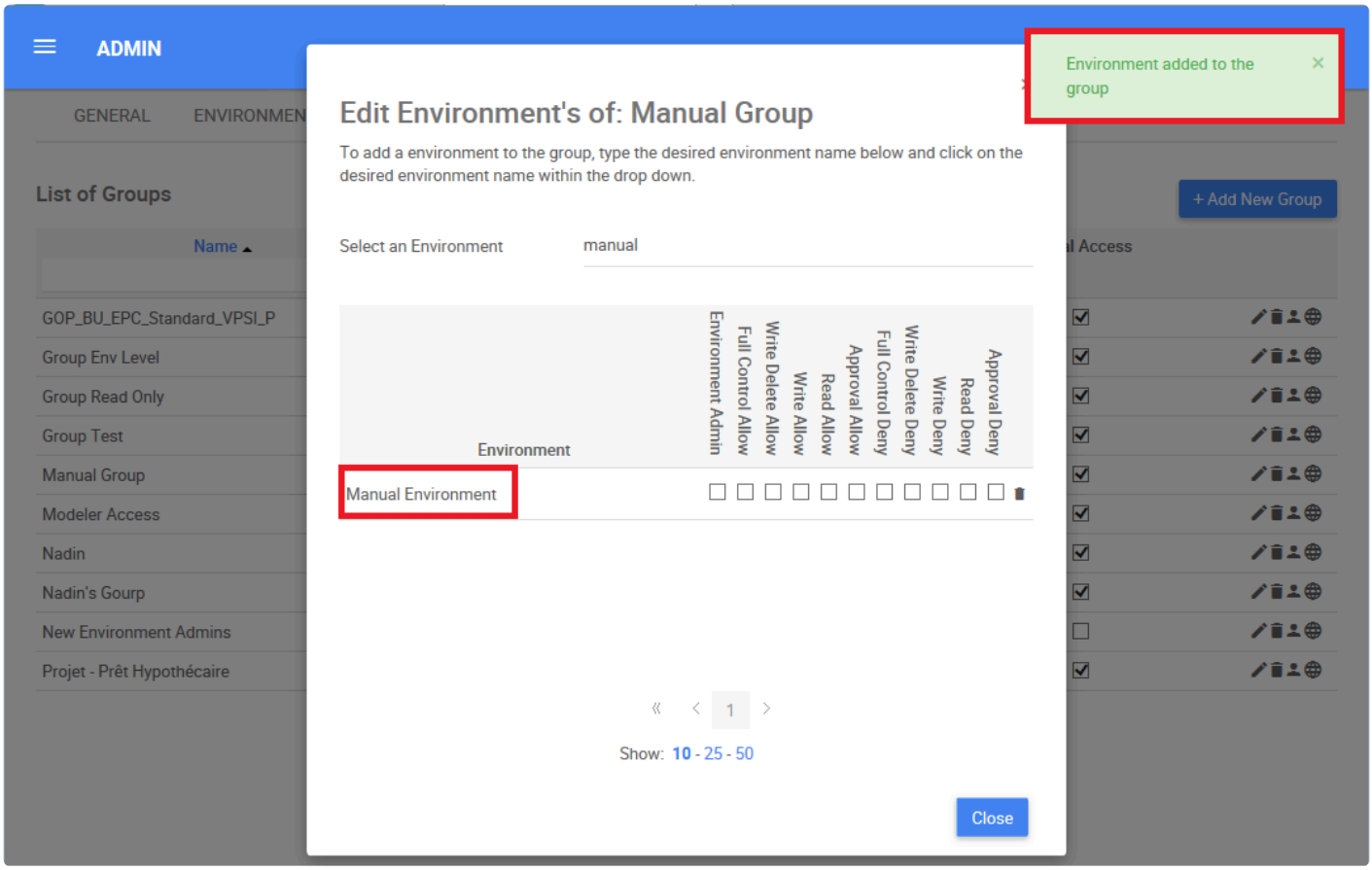


3. Type the name of the Environment you want to add to the Group. “Double Click” on the Environment to finish adding it



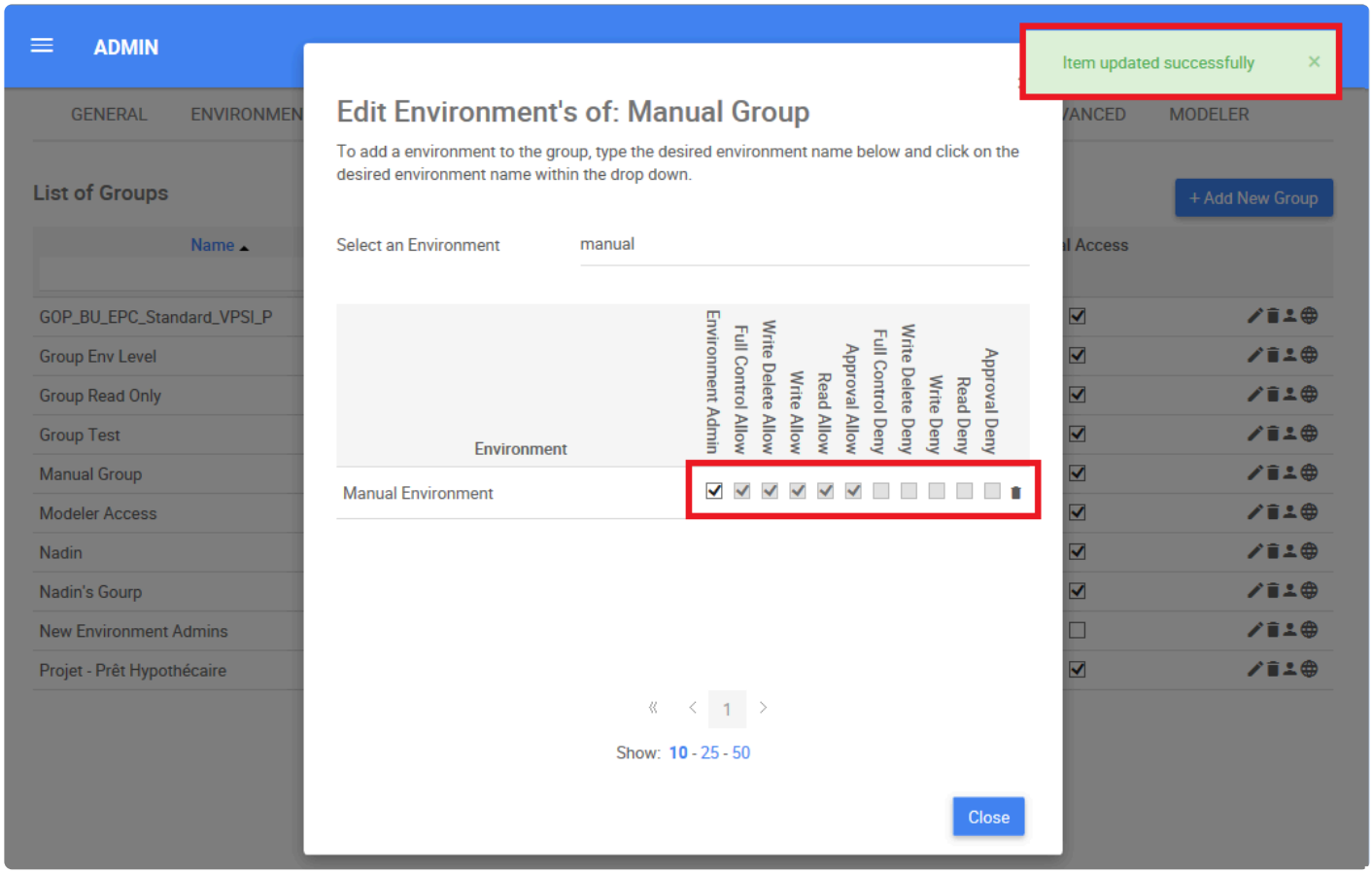
4. The added Environment will appear on the following table. The system admin will receive an automatic notification when the Environment is successfully added

> ❗ This process may take a minute or two to be completed



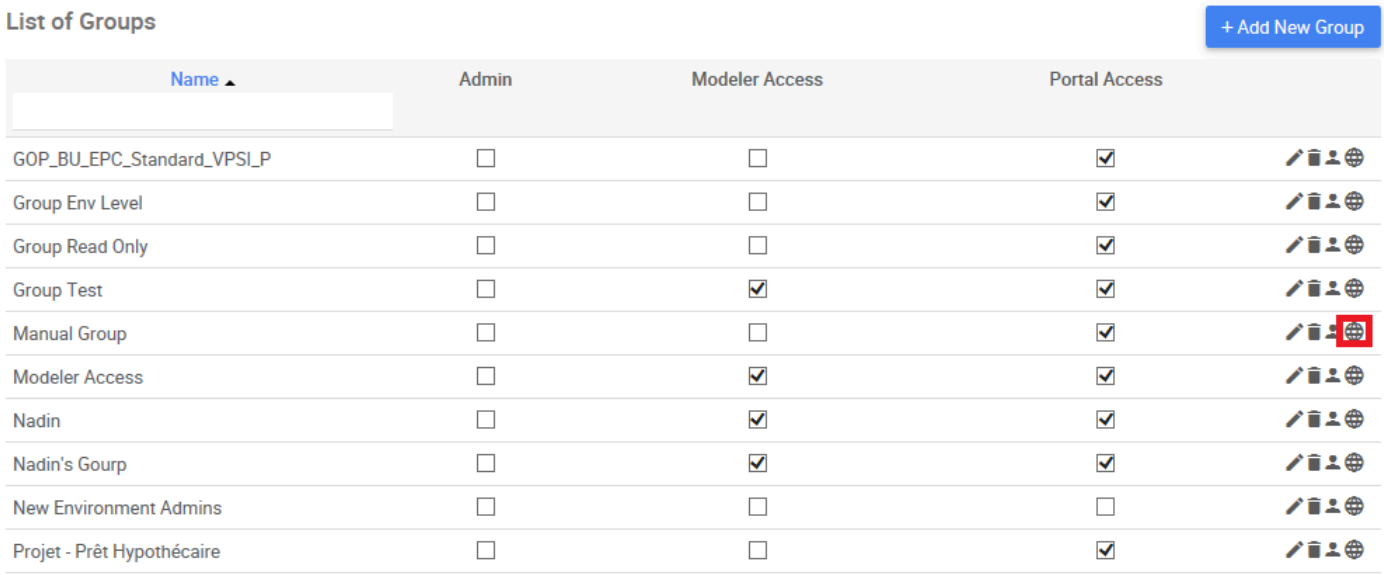
5. Add the Level of Security for the Group. For this example, the “Environment Admin” option is chosen. The system admin will receive an automatic notification when the level of security is successfully added. Refer to the following table to view all the levels of security

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

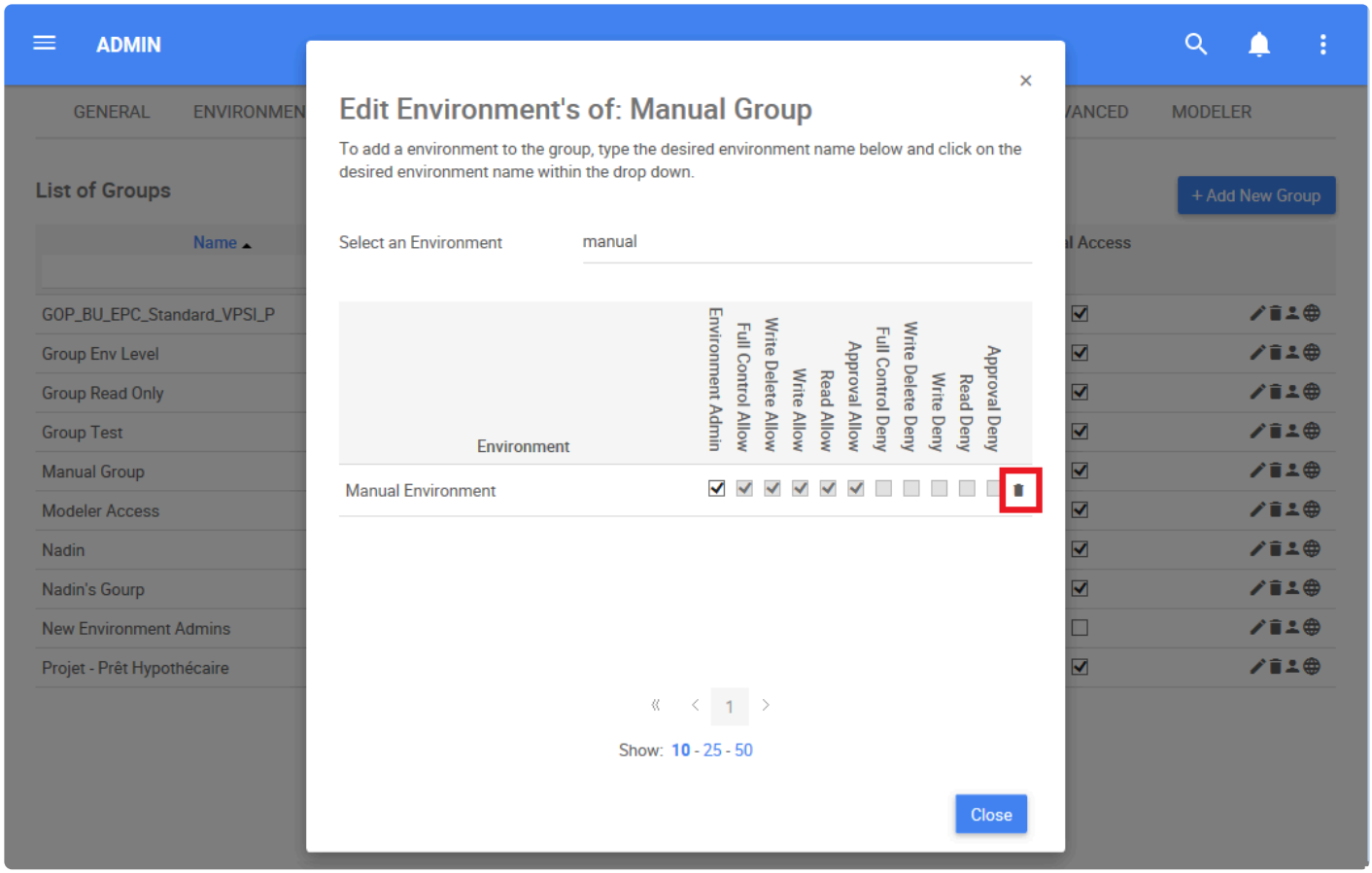


How to Remove an Environment from a Group

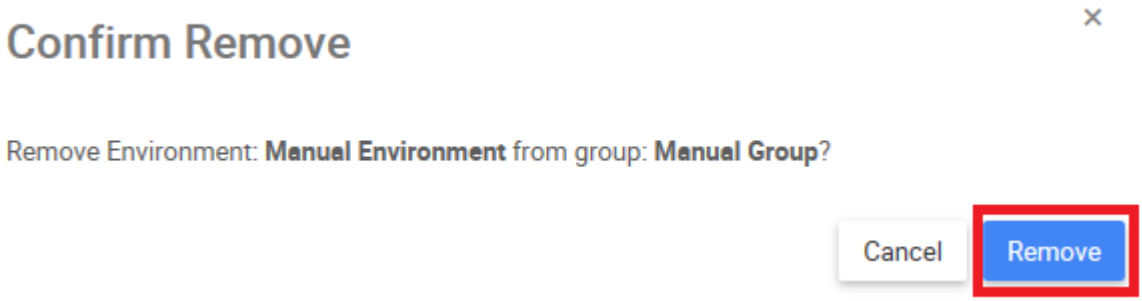
1. Navigate the cursor and select the icon for the Group you want to remove an Environment from



2. Navigate the cursor and select the icon



3. The following box will appear, select the “Remove” box to remove an Environment from a Group



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
Show Latest Allow	User is allowed to view latest and published content 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
Show Latest Deny	User is denied viewing the latest content 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

2. Full Control Allow

Approval Deny	☐
Read Deny	☐
Write Deny	☐
Write Delete Deny	☐
Full Control Deny	☐
Approval Allow	☑
Read Allow	☑
Write Allow	☑
Write Delete Allow	☑
Full Control Allow	☑
Environment Admin	☐

3. Write Delete Allow

Approval Deny	☐
Read Deny	☐
Write Deny	☐
Write Delete Deny	☐
Full Control Deny	☐
Approval Allow	☐
Read Allow	☑
Write Allow	☑
Write Delete Allow	☑
Full Control Allow	☐
Environment Admin	☐

4. Write Allow

Approval Deny	☐
Read Deny	☐
Write Deny	☐
Write Delete Deny	☐
Full Control Deny	☐
Approval Allow	☐
Read Allow	☑
Write Allow	☑
Write Delete Allow	☐
Full Control Allow	☐
Environment Admin	☐

5. Read Allow

Approval Deny	☐
Read Deny	☐
Write Deny	☐
Write Delete Deny	☐
Full Control Deny	☐
Approval Allow	☐
Read Allow	☑
Write Allow	☐
Write Delete Allow	☐
Full Control Allow	☐
Environment Admin	☐

6. Approval Allow

Approval Deny	☐
Read Deny	☐
Write Deny	☐
Write Delete Deny	☐
Full Control Deny	☐
Approval Allow	☑
Read Allow	☑
Write Allow	☐
Write Delete Allow	☐
Full Control Allow	☐
Environment Admin	☐

7. Full Control Deny

Approval Deny	☑
Read Deny	☑
Write Deny	☑
Write Delete Deny	☑
Full Control Deny	☑
Approval Allow	☐
Read Allow	☐
Write Allow	☐
Write Delete Allow	☐
Full Control Allow	☐
Environment Admin	☐

8. Write Delete Deny

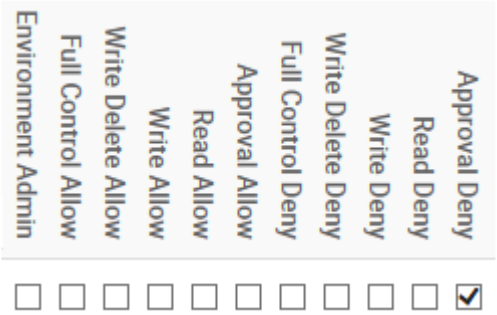
Approval Deny	☑
Read Deny	☑
Write Deny	☑
Write Delete Deny	☑
Full Control Deny	☐
Approval Allow	☐
Read Allow	☐
Write Allow	☐
Write Delete Allow	☐
Full Control Allow	☐
Environment Admin	☐

9. Write Deny

Approval Deny	☐
Read Deny	☐
Write Deny	☑
Write Delete Deny	☑
Full Control Deny	☐
Approval Allow	☐
Read Allow	☐
Write Allow	☐
Write Delete Allow	☐
Full Control Allow	☐
Environment Admin	☐

10. Read Deny

11. Approval Deny



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

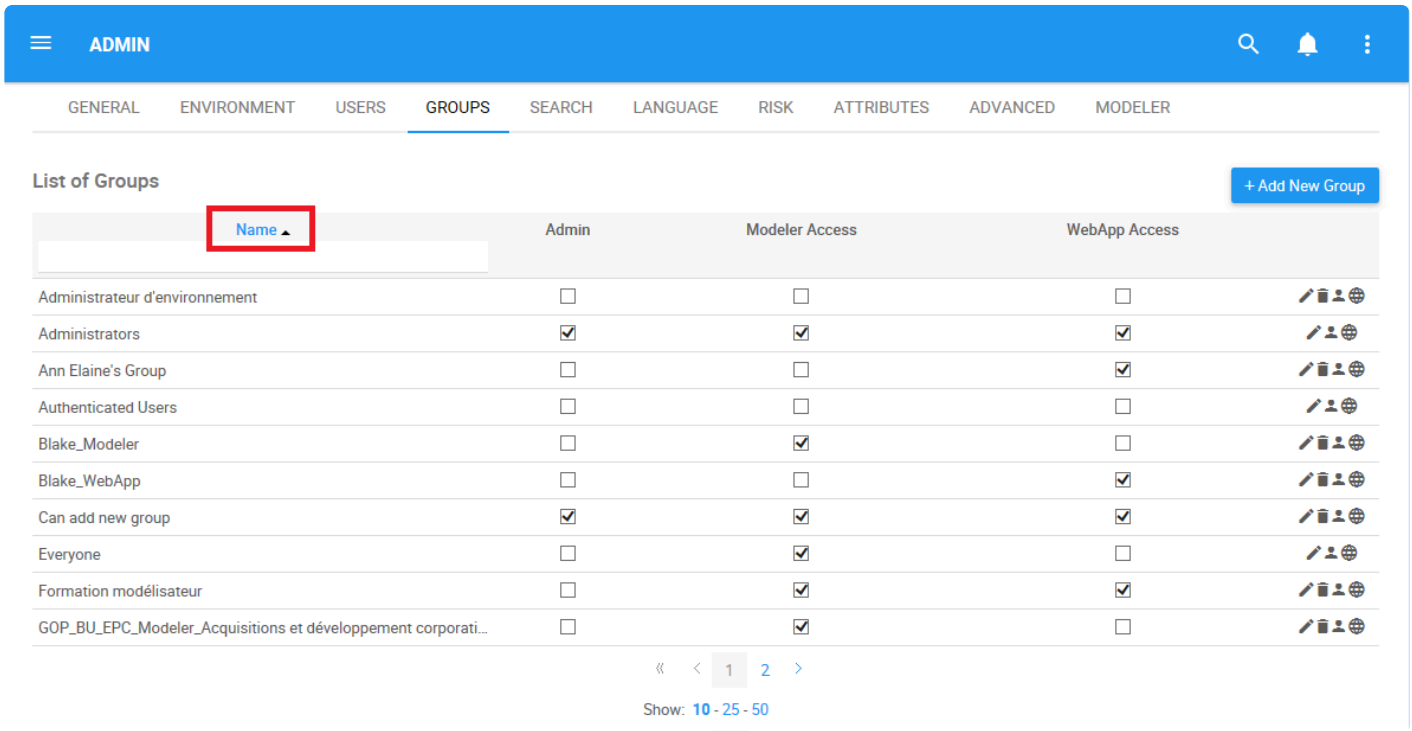
1. Navigate to the System Admin section

2. Navigate the Environment Tab

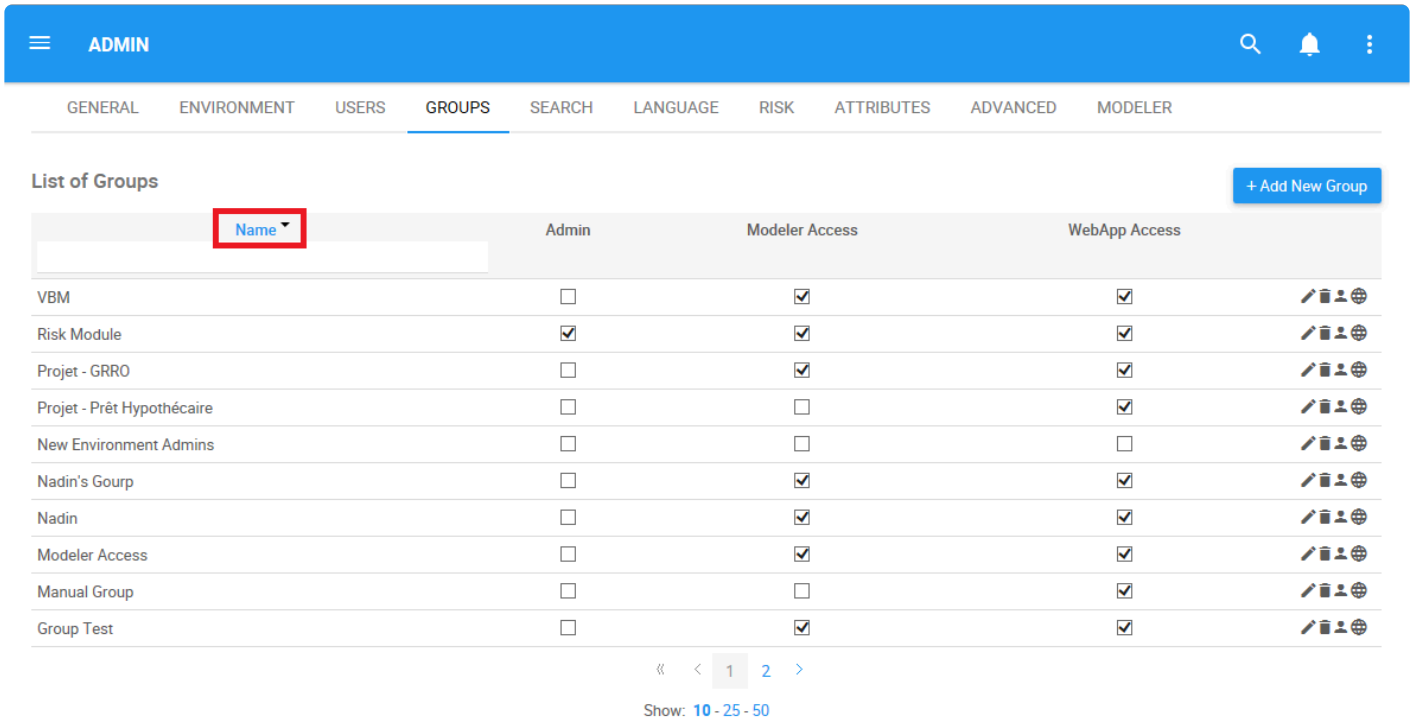
3. Click on the **Name**

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”.



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
Risk Module
Projet - GRRO
Projet - Prêt Hypothécaire
New Environment Admins
Nadin's Gourp
Nadin
Modeler Access
Manual Group
Group Test
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:

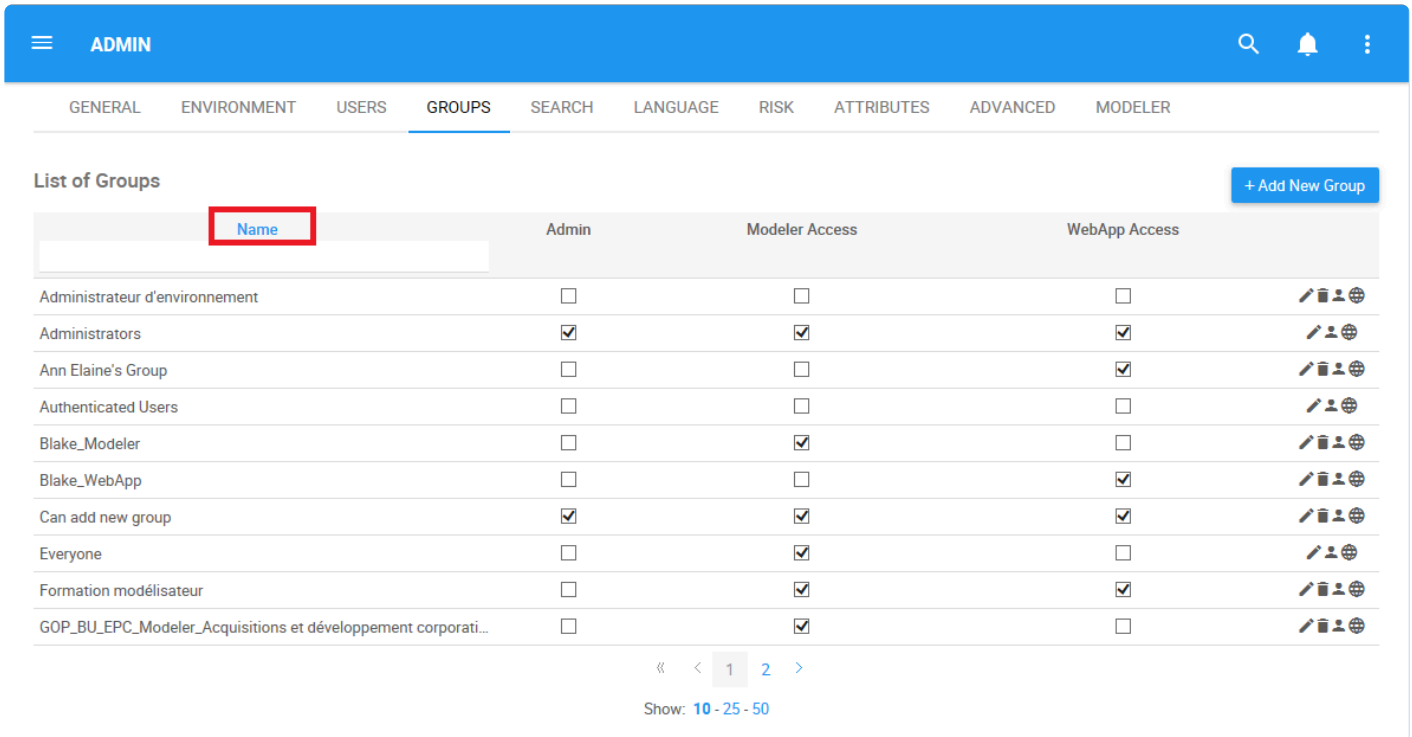
1. How to Add Filters
2. How to Remove Filters
3. How to Combine Filters

10.4.8.1 Add Filter

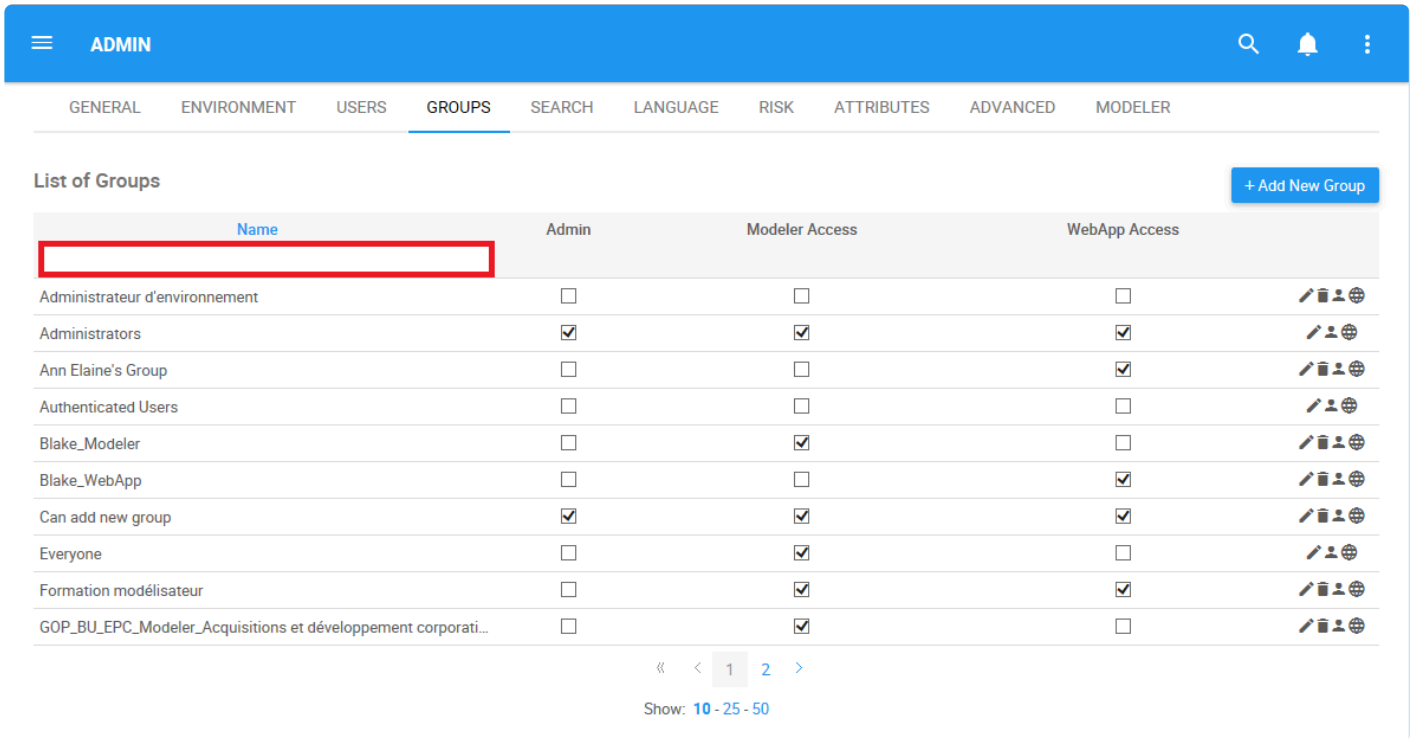
System Admins can add filters to see the items of its choice. **Type** what you are looking for to filter the list

How to Add Filter

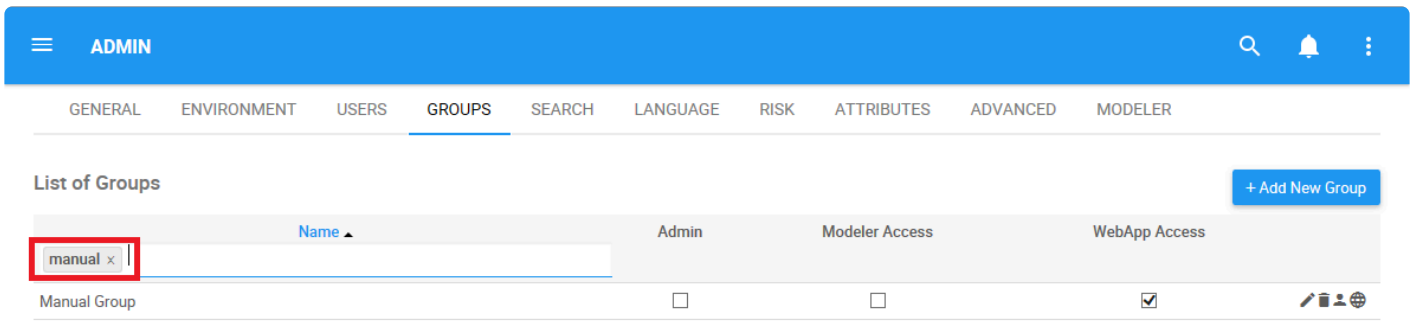
1. Navigate cursor and select the “Name”



2. Type the word you are looking for to filter the list on the search box and click on “enter”



3. For this example, we will type “ya.” The EPC will populate the results with the new filter



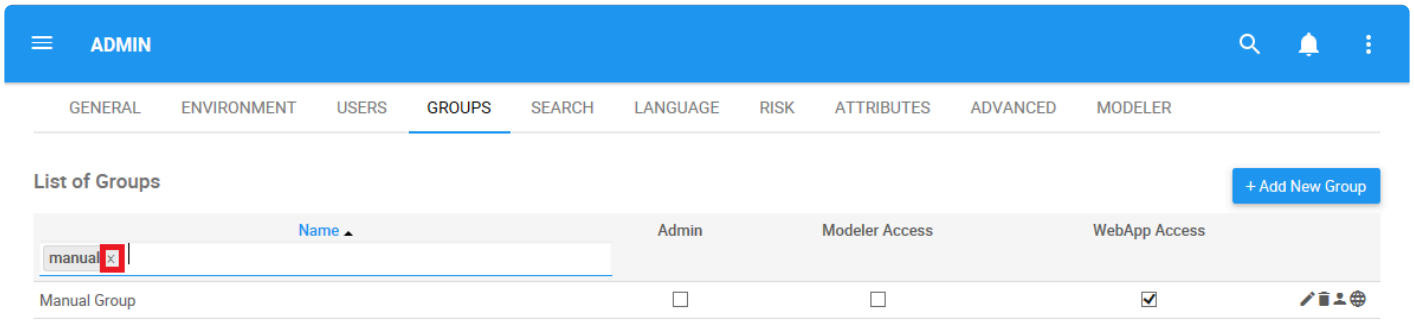
10.4.8.2 Remove Filter

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.



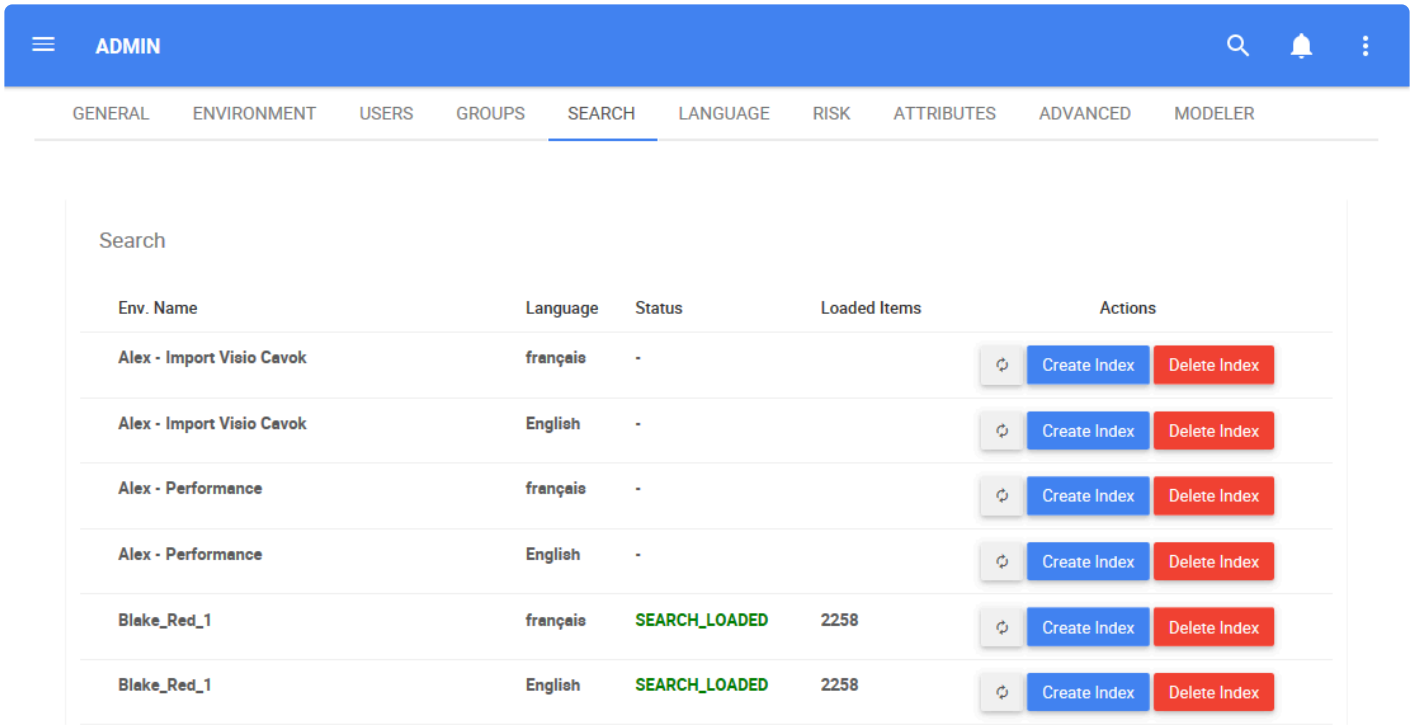
10.4.8.3 Combine Filter

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.



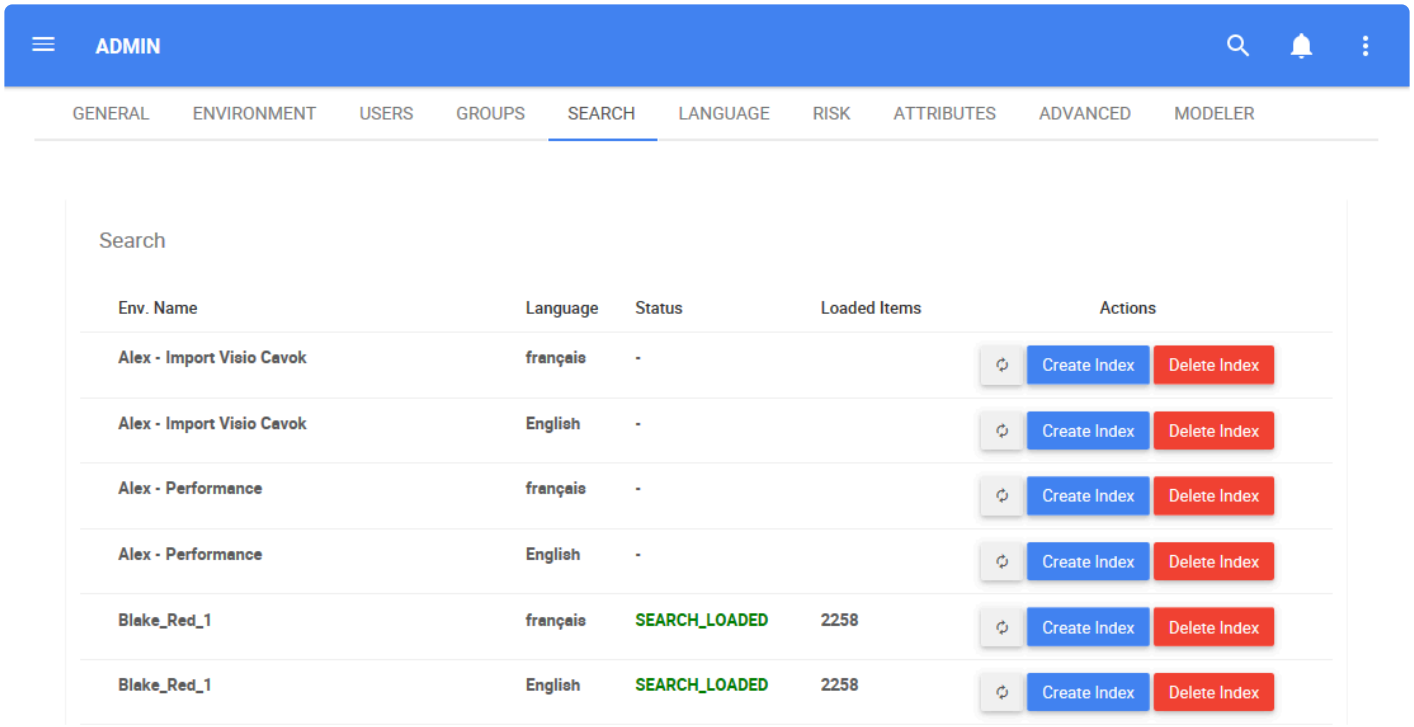
For the Search function to work effectively, Environment and System Admins must populate the indexes within the EPC. The indexes, once uploaded, allow users to search through them with the Search function. Search Indexes must be both created and subsequently refreshed to be used most effectively.

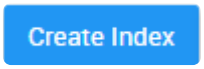
To Create Search Indexes, please see the steps below:

1. Navigate to System Admin page

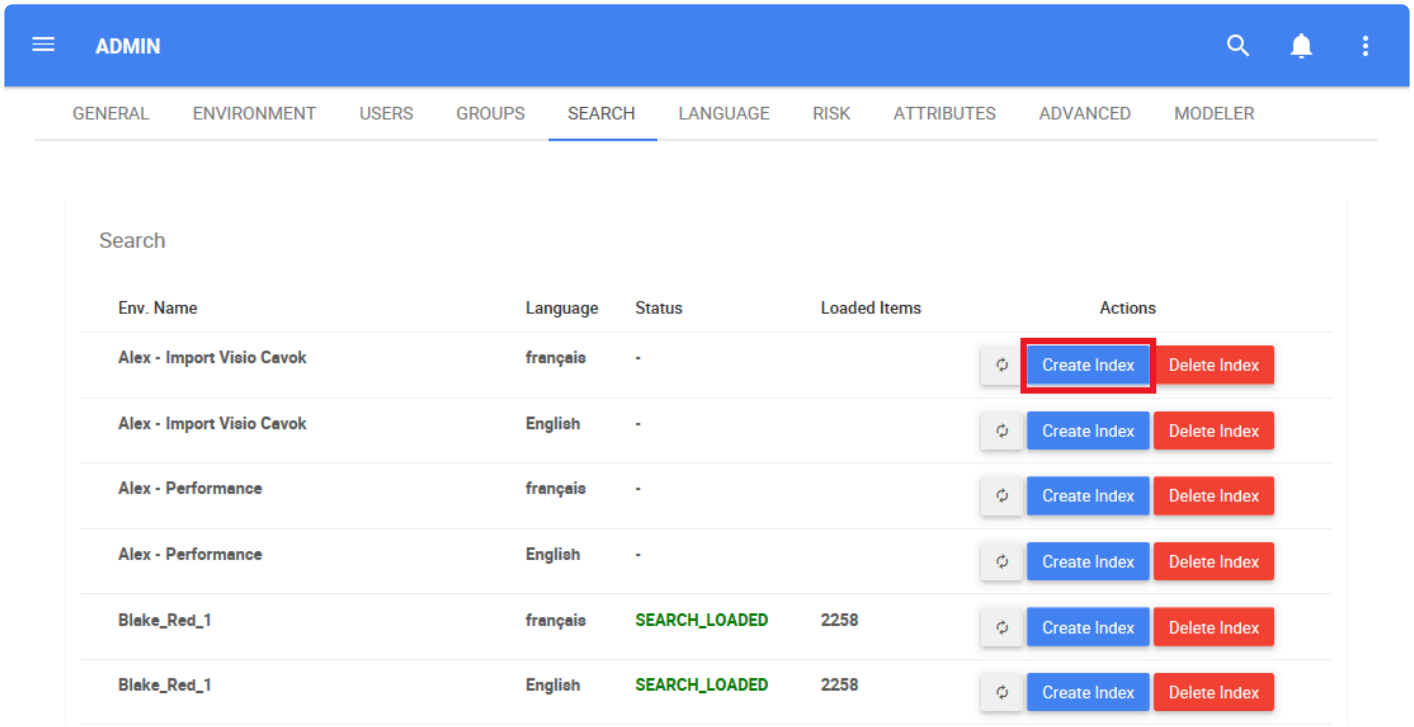
2. Navigate to Search Tab

3. You will be navigated to the Search page

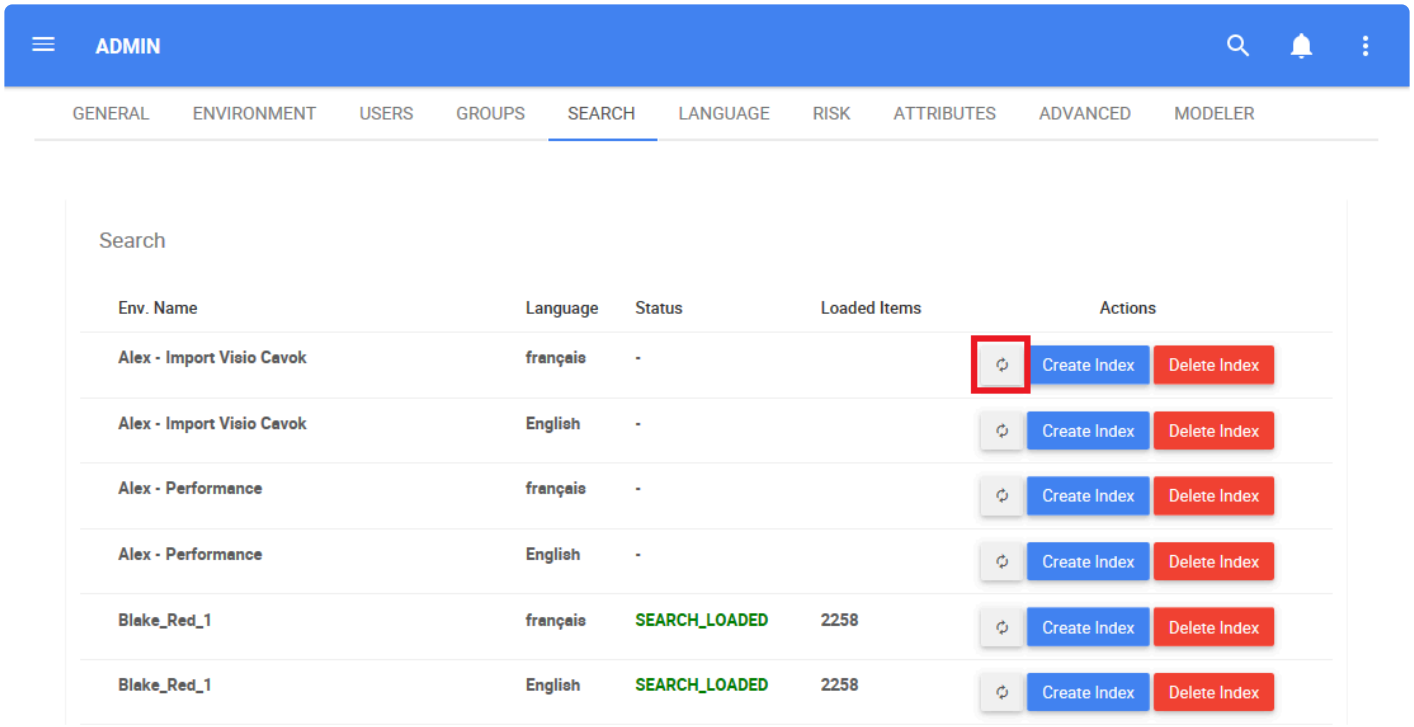


4. To create the Index, select the 

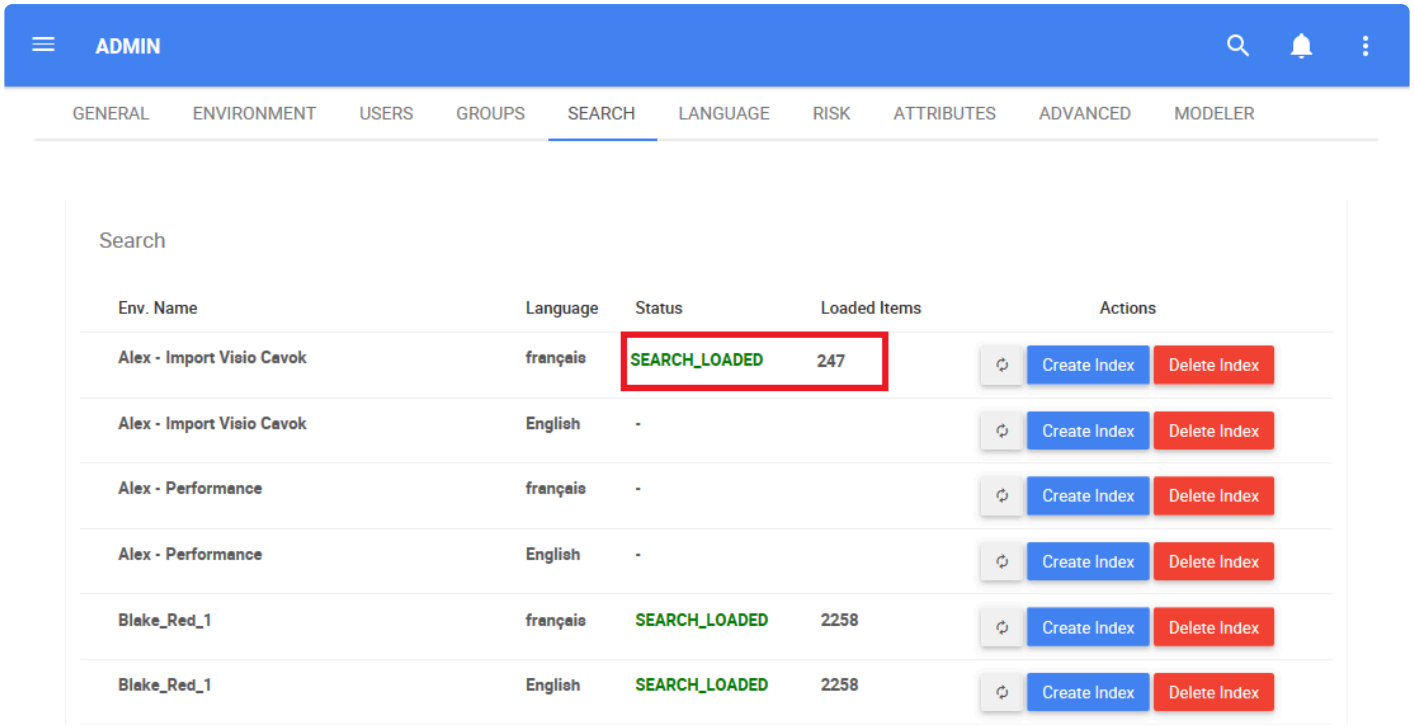
icon



5. After the index has been created, select the refresh icon



6. Once the refresh, the status of the upload will be reflected within the “Status” and “Loaded Items” section



A Search Index must be loaded for the Search bar to function. Without uploading and Index, users will not be able to use the search function.

Loading an Index can be time consuming depending on Index size. It is recommended that Admins create of refresh indexes when traffic on the Web App is at a minimum (e.g. overnight).

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 Localization

System Admins have two main responsibilities regarding system languages. The responsibilities are as follows:

- Manage Languages
- Apply New Languages

System Admins can also set up localization values:

- Localization Values

10.6.1 Manage Languages

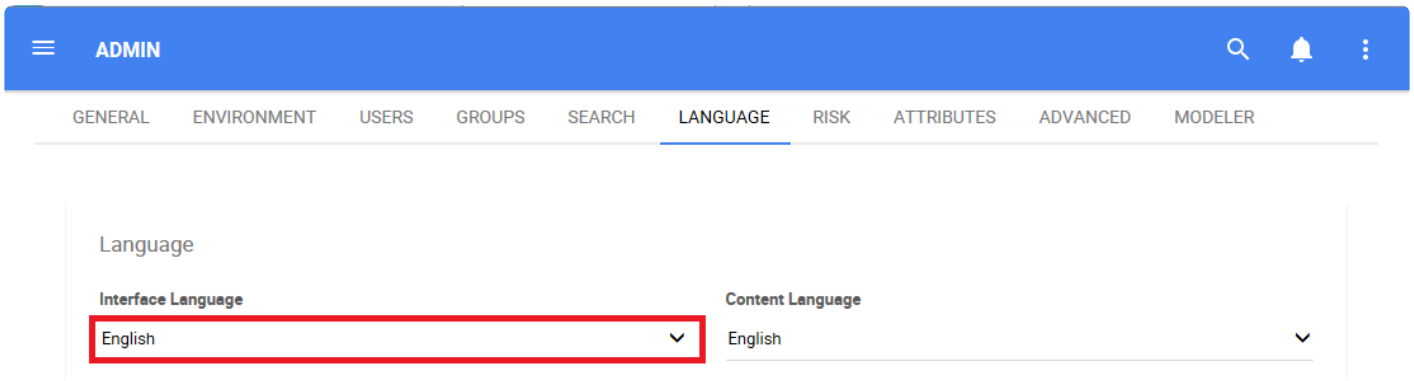
System Admins can select the Interface Language and Content Language for the system. The languages selected will be the default languages for end users. End users themselves can further customize their language settings.

To toggle between languages, please see the steps below:

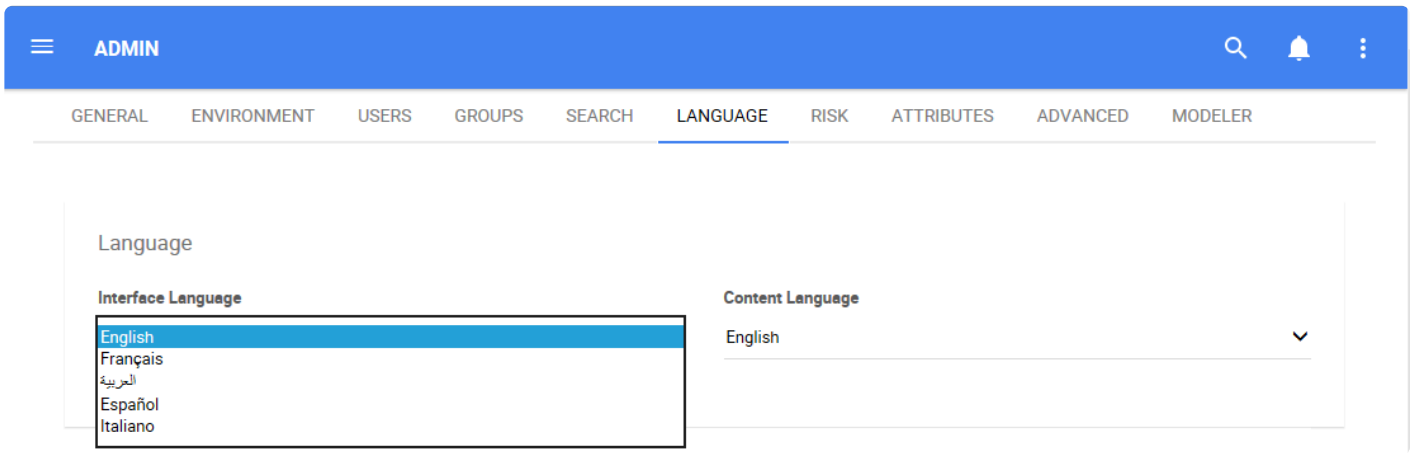
1. Navigate to the “System Admin” section of the EPC

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



4. It will generate a drop-down menu featuring **all** available languages.



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

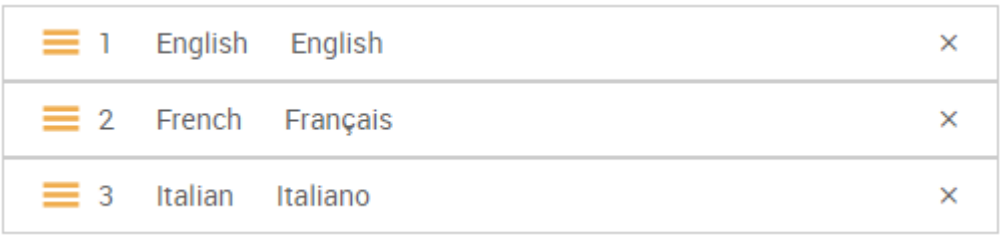
The languages displayed control both the available content when referencing a database and the hierarchy of data query activities.

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:



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.

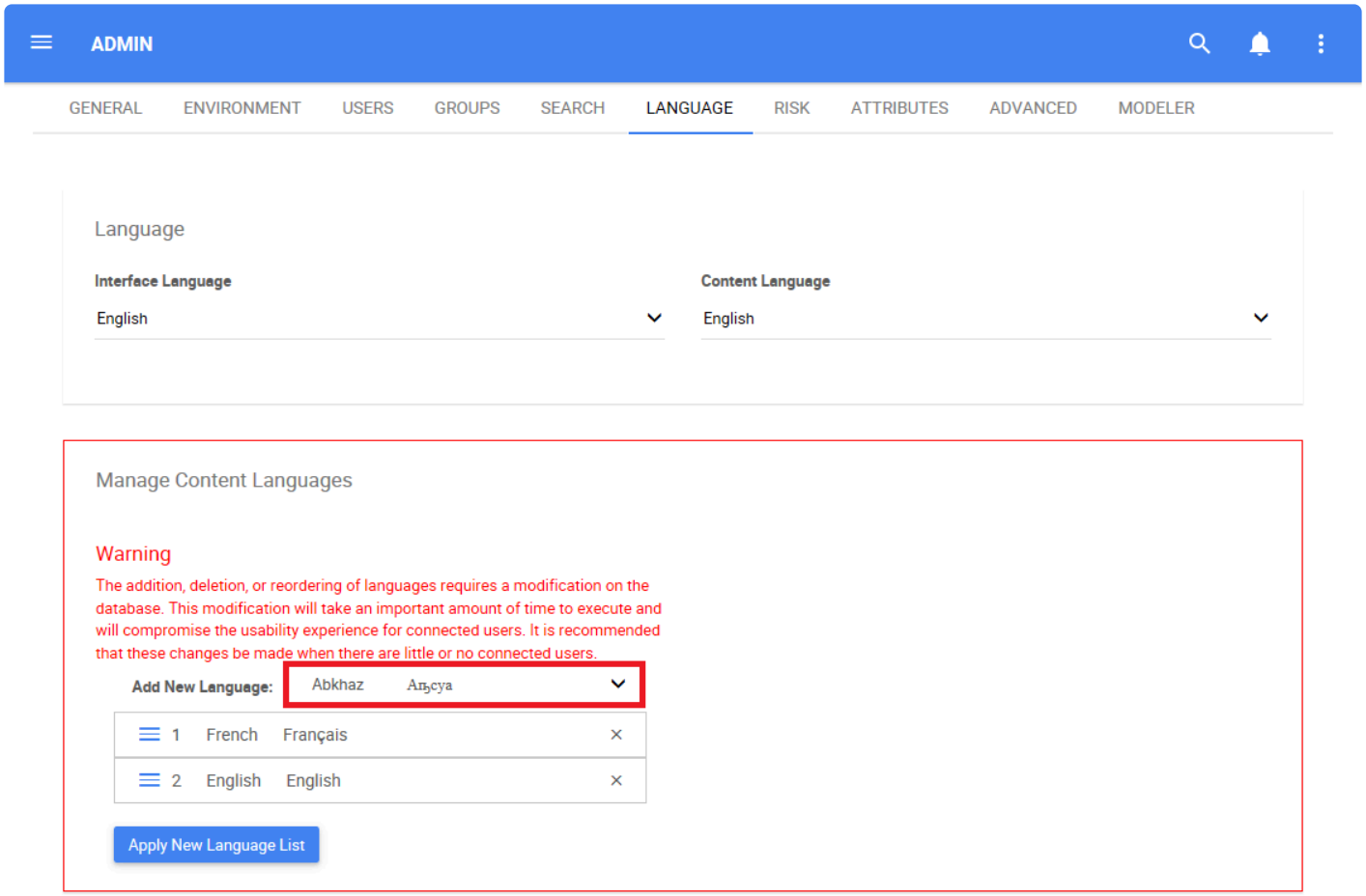
10.6.2.2 Add New Languages

To Apply a New Language

1. Navigate to the System Admin section

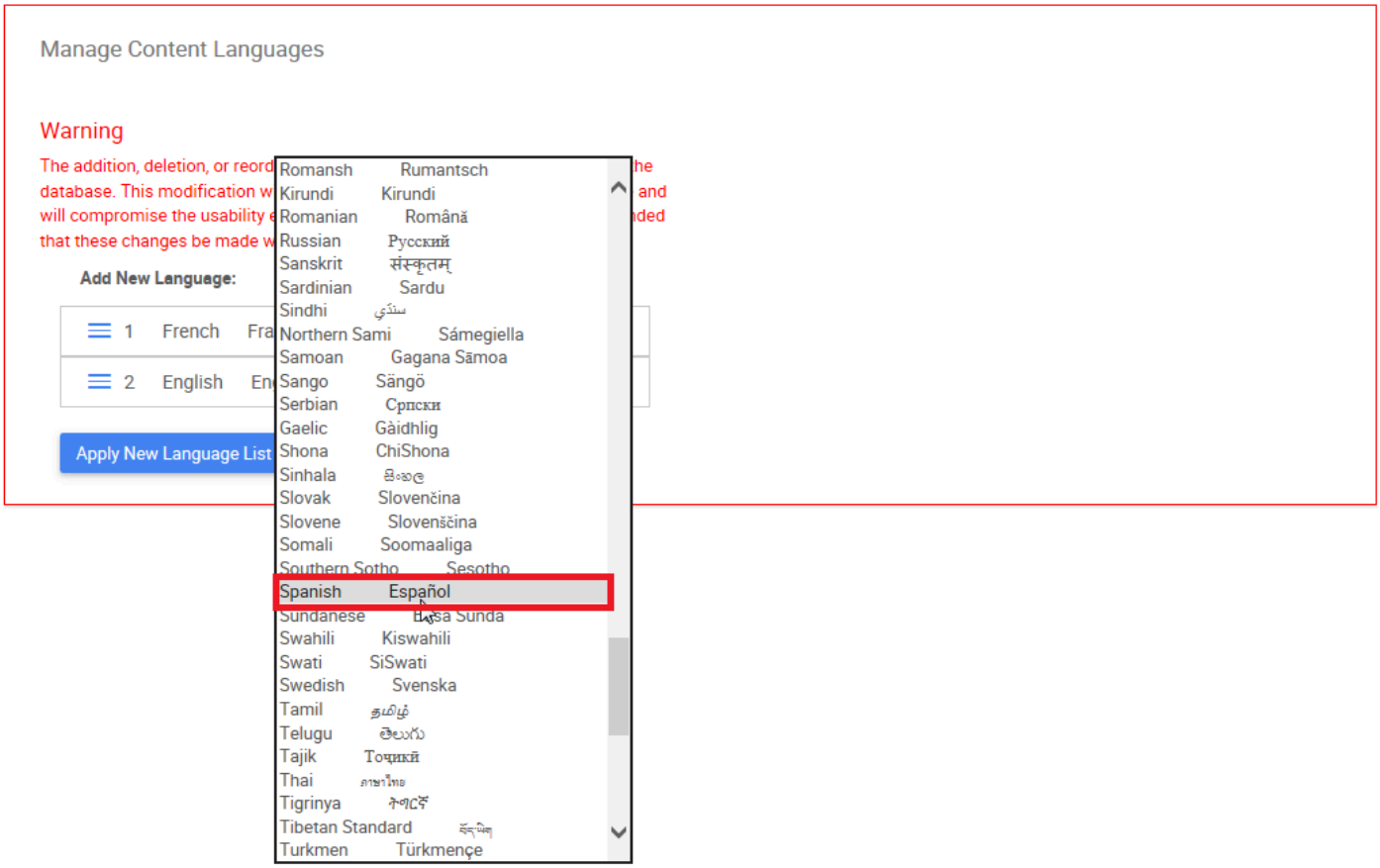
2. Select the Languages tab

3. In the Manage Content Languages, select the “Add New Language” toolbar

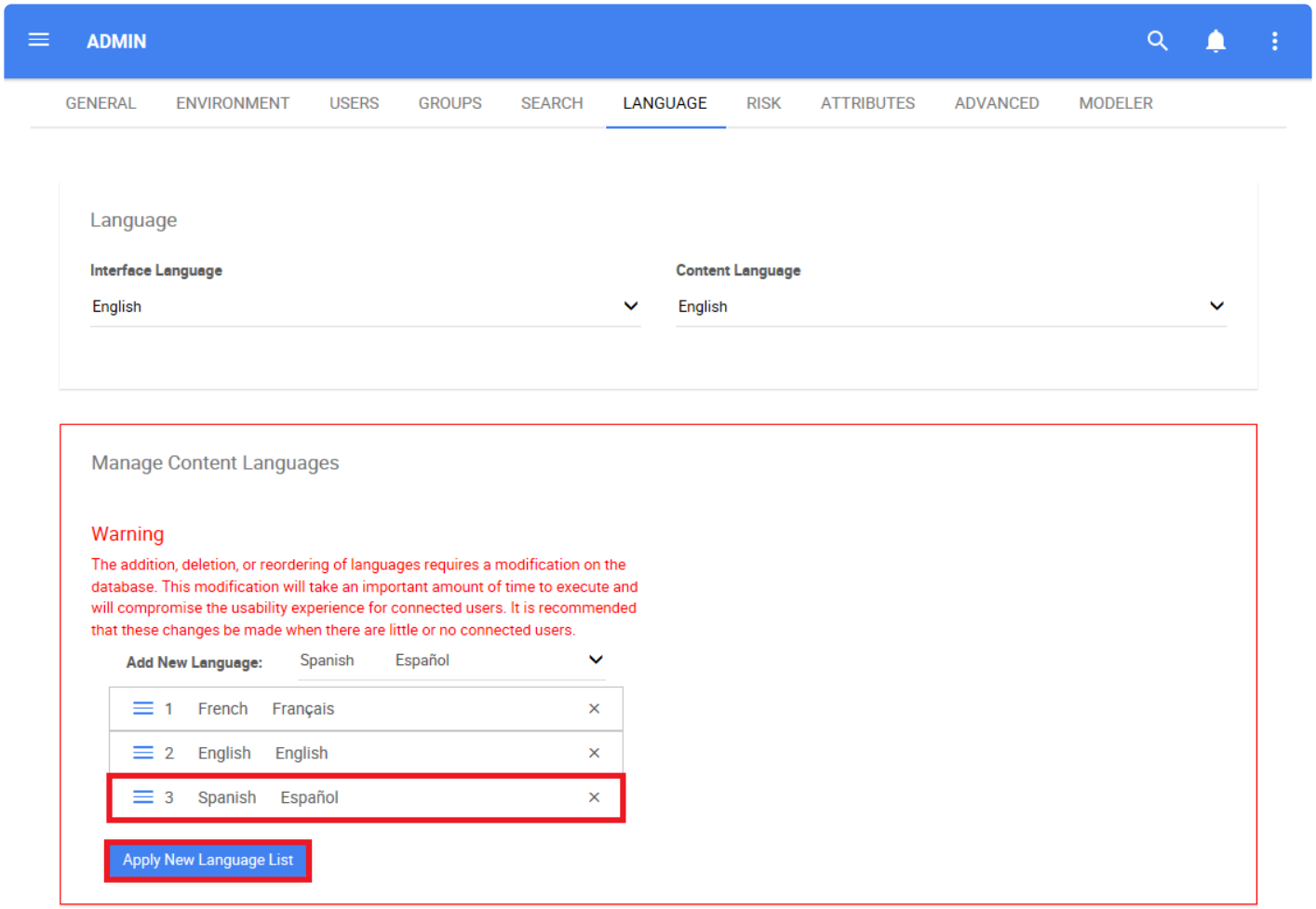


4. This will generate a drop-down menu featuring available languages

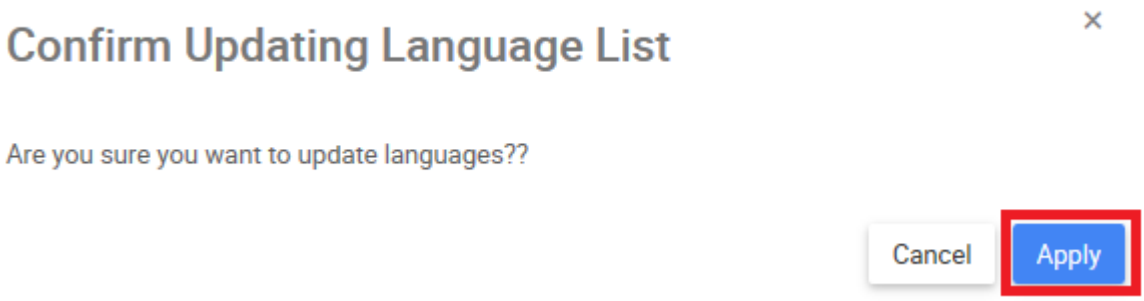
5. Select the desired language. For this example, choose Spanish



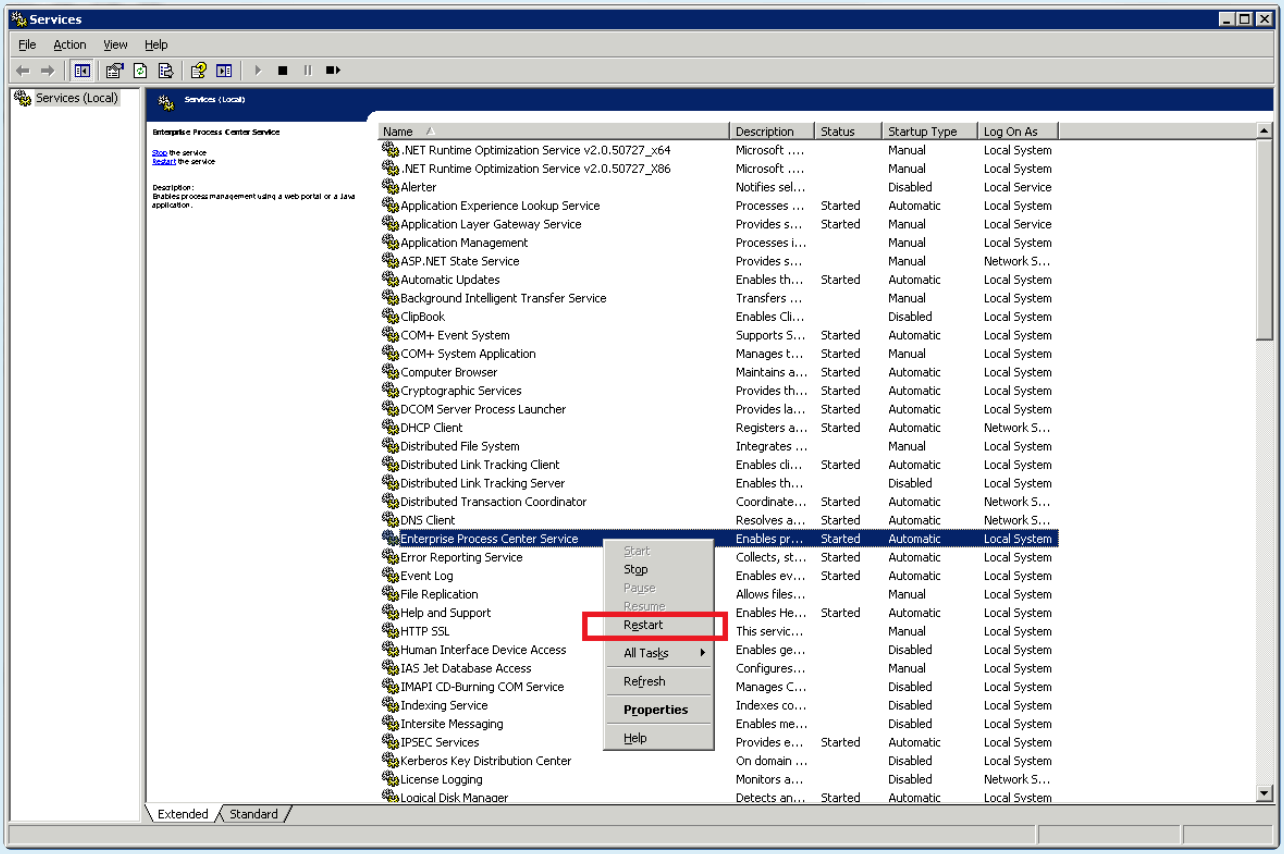
5. Select the **Apply New Language List** button.



5. The following box will appear, click on the “Apply” box to confirm the update on the language list



When changing languages settings, you must also restart the EPC Modeler service. This will require your IT/System Admin support.


Services
File Action View Help
Services (Local)
Enterprise Process Center Service
Stop the service
Restart the service
Description:
Enables process management using a web portal or a Java application.
Name Description Status Startup Type Log On As
.NET Runtime Optimization Service v2.0.50727_x64 Microsoft .... Manual Local System
.NET Runtime Optimization Service v2.0.50727_X86 Microsoft .... Manual Local System
Alerter Notifies sel... Disabled Local Service
Application Experience Lookup Service Processes ... Started Automatic Local System
Application Layer Gateway Service Provides s... Started Manual Local Service
Application Management Processes i... Manual Local System
ASP.NET State Service Provides s... Manual Network S...
Automatic Updates Enables th... Started Automatic Local System
Background Intelligent Transfer Service Transfers ... Manual Local System
ClipBook Enables Cli... Disabled Local System
COM+ Event System Supports S... Started Automatic Local System
COM+ System Application Manages t... Started Manual Local System
Computer Browser Maintains a... Started Automatic Local System
Cryptographic Services Provides th... Started Automatic Local System
DCOM Server Process Launcher Provides la... Started Automatic Local System
DHCP Client Registers a... Started Automatic Network S...
Distributed File System Integrates ... Manual Local System
Distributed Link Tracking Client Enables cli... Started Automatic Local System
Distributed Link Tracking Server Enables th... Disabled Local System
Distributed Transaction Coordinator Coordinate... Started Automatic Network S...
DNS Client Resolves a... Started Automatic Network S...
Enterprise Process Center Service Enables pr... Started Automatic Local System
Error Reporting Service Collects, st... Started Automatic Local System
Event Log Enables ev... Started Automatic Local System
File Replication Allows files... Manual Local System
Help and Support Enables He... Started Automatic Local System
HTTP SSL This servic... Manual Local System
Human Interface Device Access Enables ge... Disabled Local System
IAS Jet Database Access Configures... Manual Local System
IMAPI CD-Burning COM Service Manages C... Disabled Local System
Indexing Service Indexes co... Disabled Local System
Intersite Messaging Enables me... Disabled Local System
IPSEC Services Provides e... Started Automatic Local System
Kerberos Key Distribution Center On domain ... Disabled Local System
License Logging Monitors a... Disabled Network S...
Logical Disk Manager Detects an... Started Automatic Local System
Start
Stop
Pause
Resume
Restart
All Tasks
Refresh
Properties
Help
Extended Standard

10.6.2.3 Remove Languages

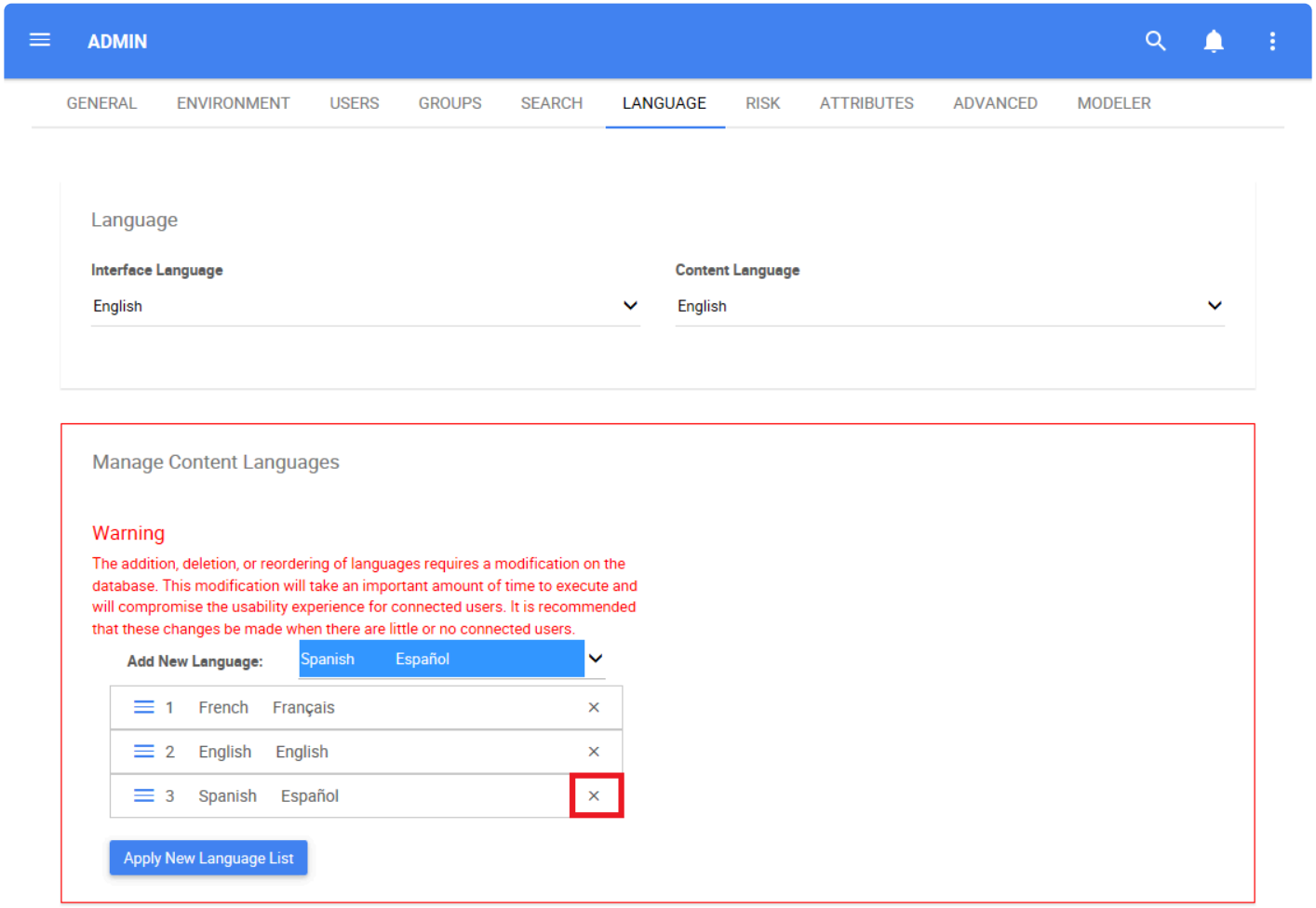
Removing languages will remove user's ability to view specific content created in the language deleted. While removing a language does not delete the overall content, it removes user's ability to query information created in this language.

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



4. Select the desired language and select the Apply New Language List 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.

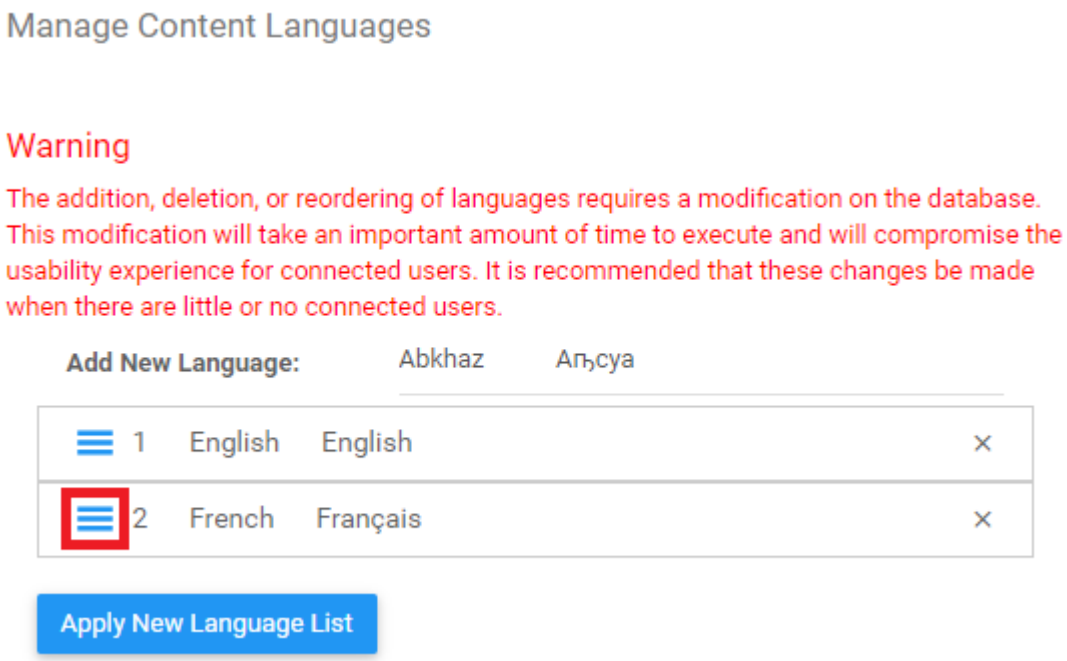
Reordering languages re-ranks the query hierarchy.

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



4. Select the desired language and select the Apply New Language List button.

10.6.3 Localization Values

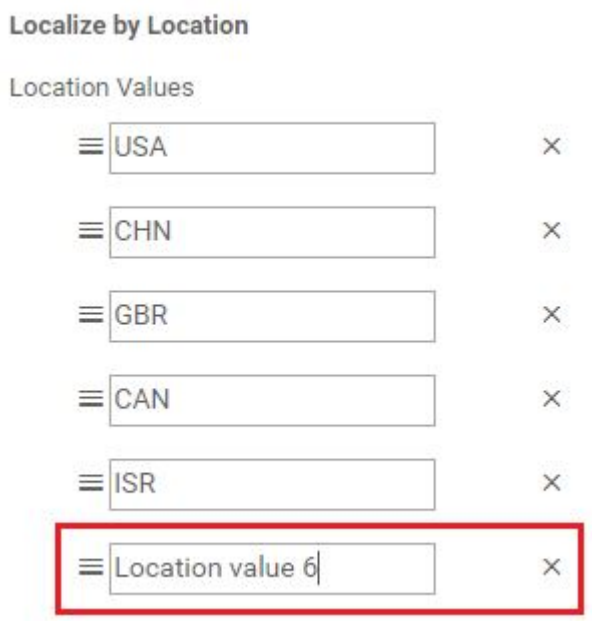
System Administrators have the ability to set localization values. Modelers will then be able to localize processes using a combination of these values.

> ! Localization values currently in use cannot be deleted.

Localization values are organized into 2 categories: Location & Product/Service.

To add a new value, click on + located on the top right corner on each Localization Category.

A new value will be added to the list.



> To delete a value, click on the “X” next to the value

Once done, click on Save

The newly added localization value(s) will now be available for use.

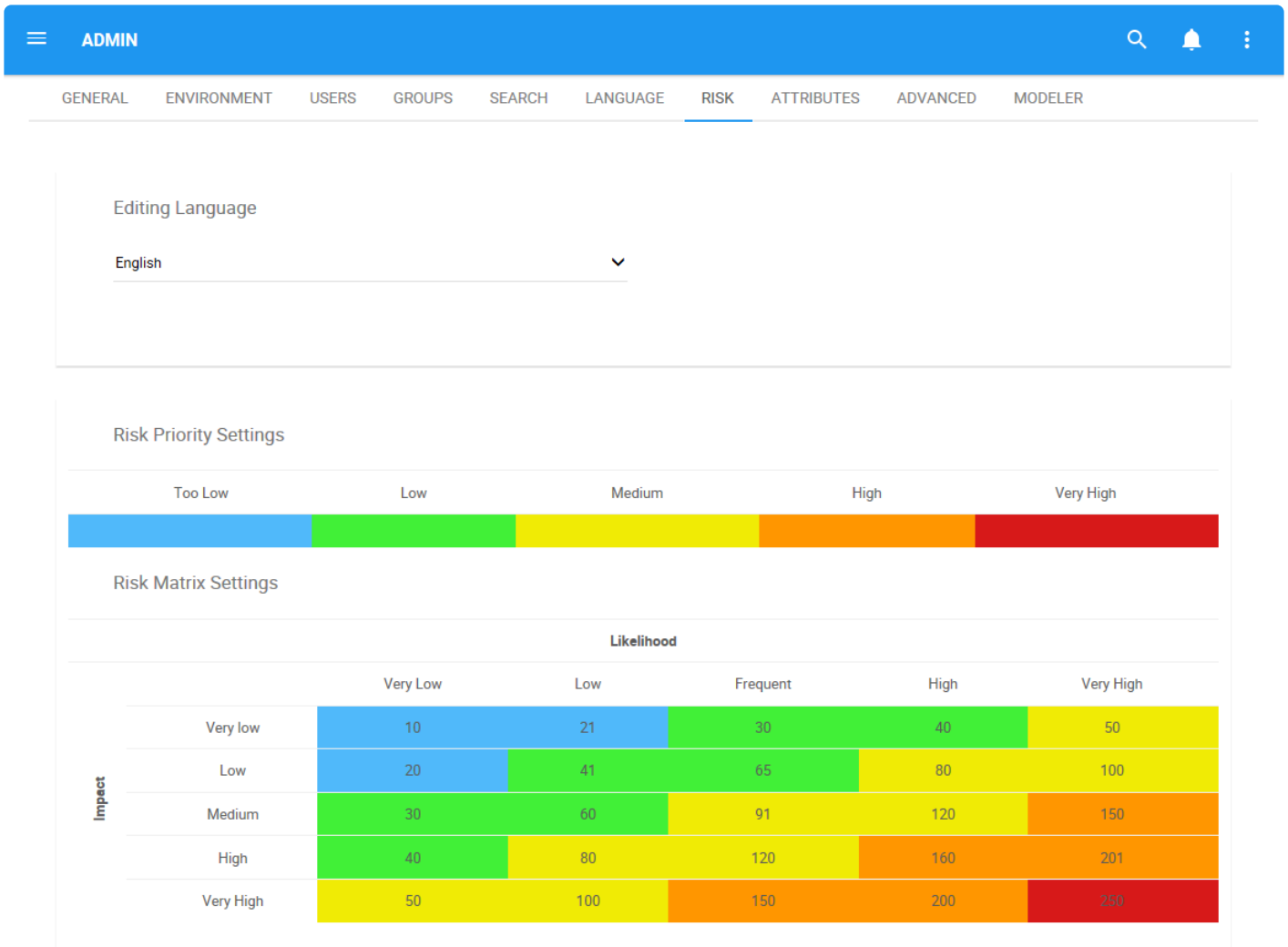
10.7 Risk

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.



System Admins can:

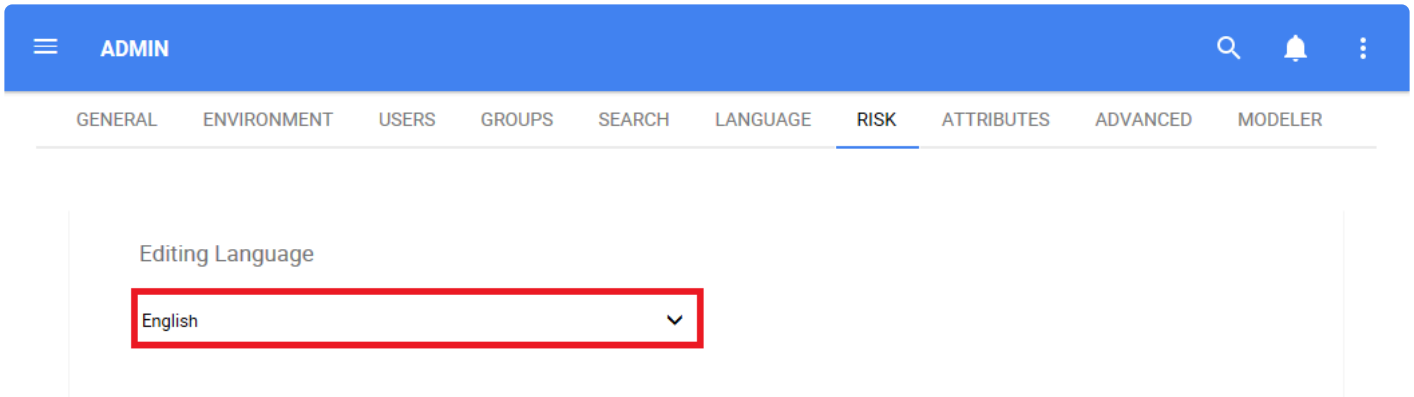
1. Edit Risk Language

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



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

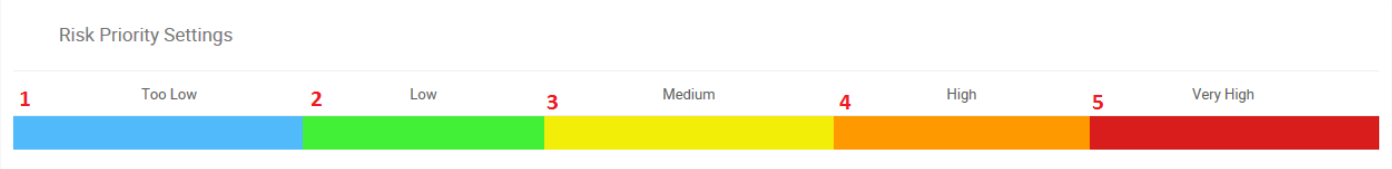
System Administrators can do the following:

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

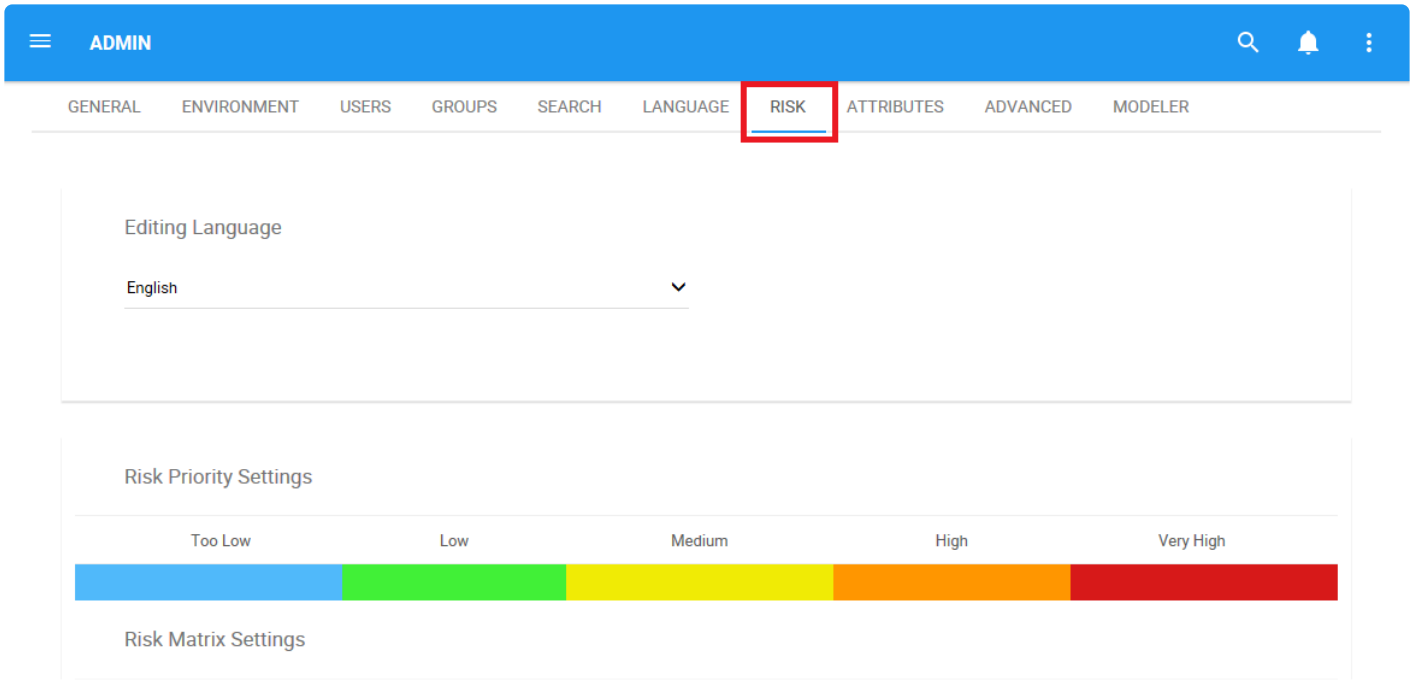
10.7.2.1.1 Edit Priority Name

A Name is given by the System Admin to each Risk Priority to label them.

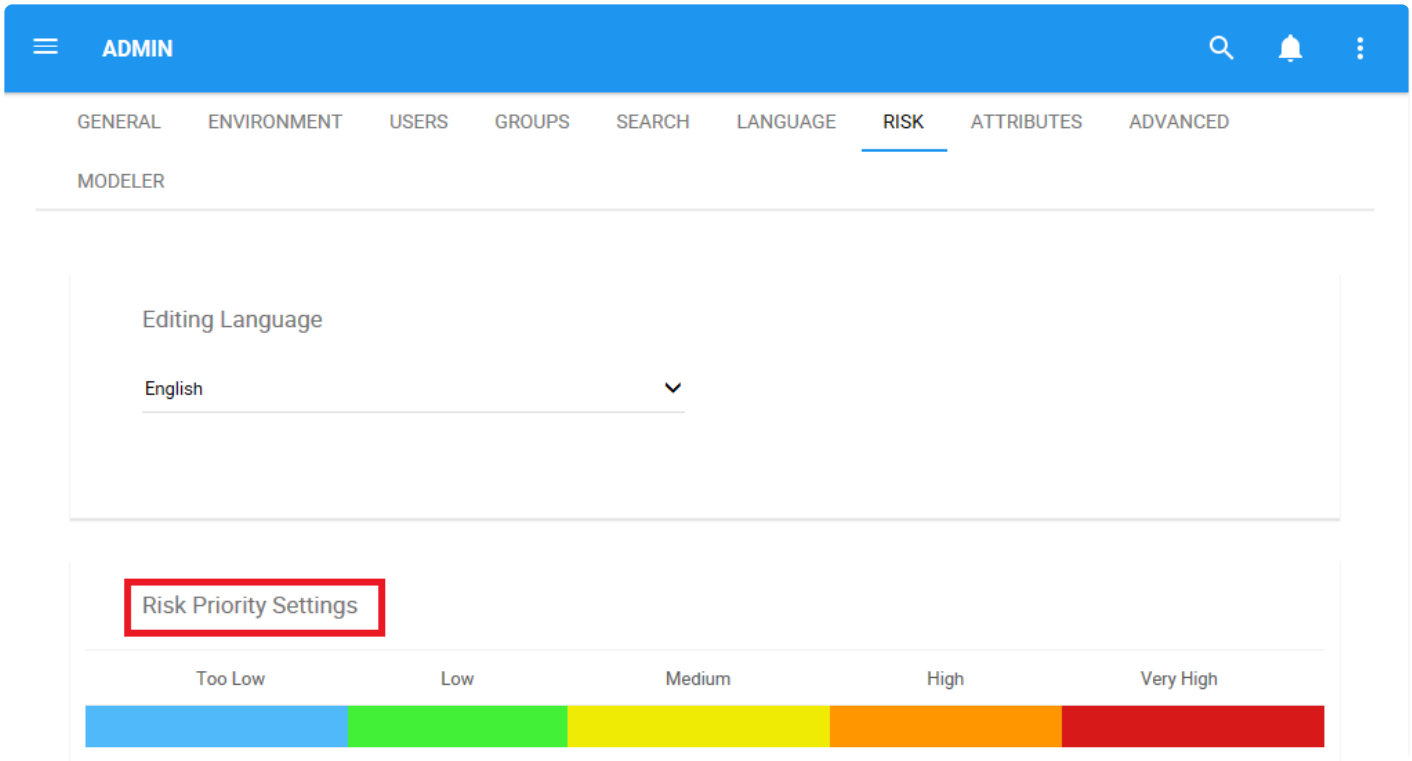
To Edit the Risk Priority Name, please follow the next steps

1. Navigate to the System Admin Section

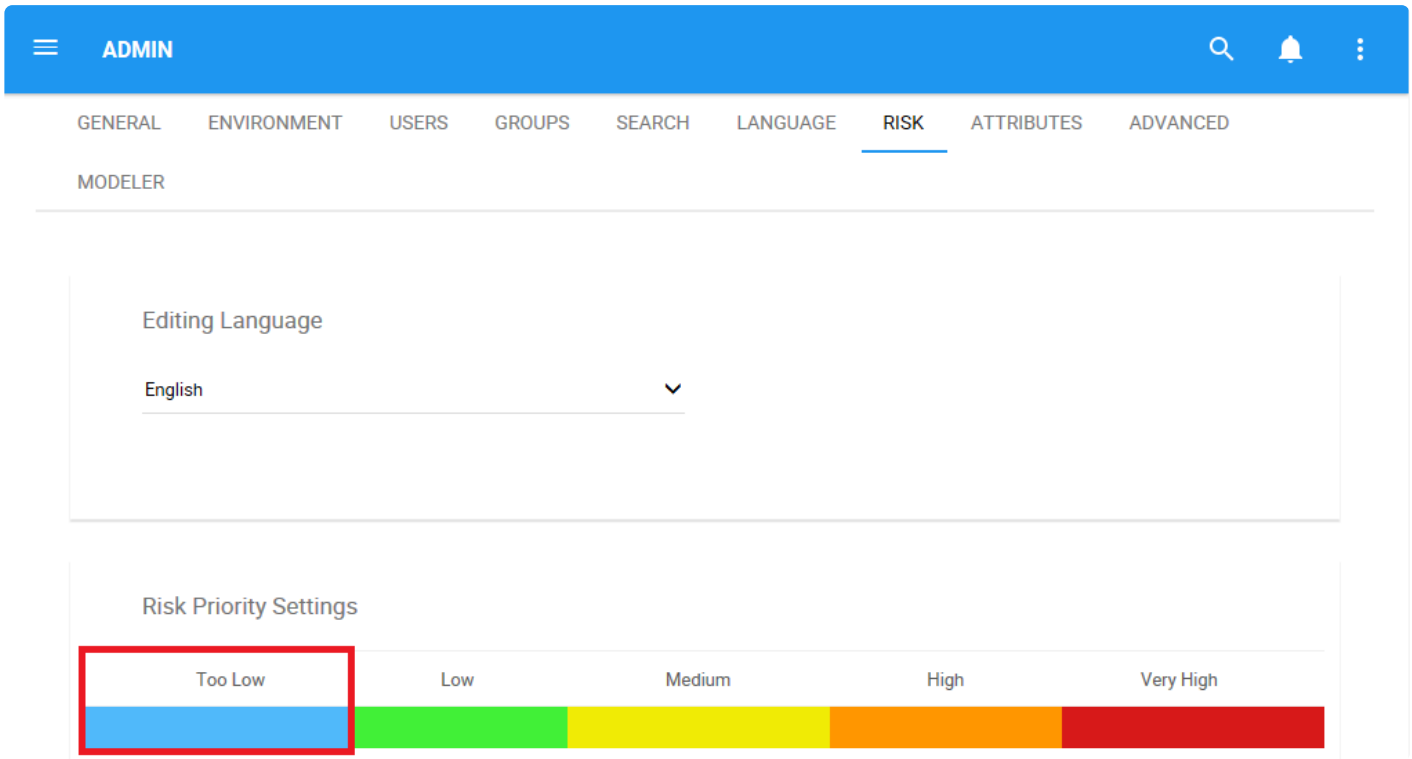
2. Select the Risk tab under the System Admin section



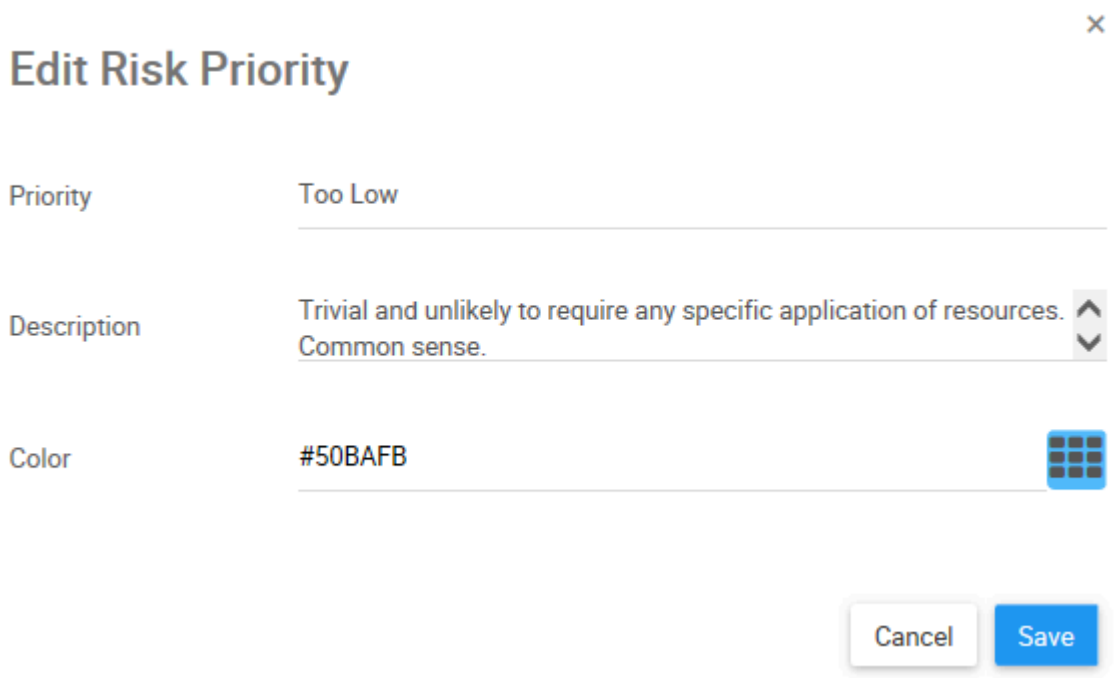
3. Navigate to the Risk Priority Settings section



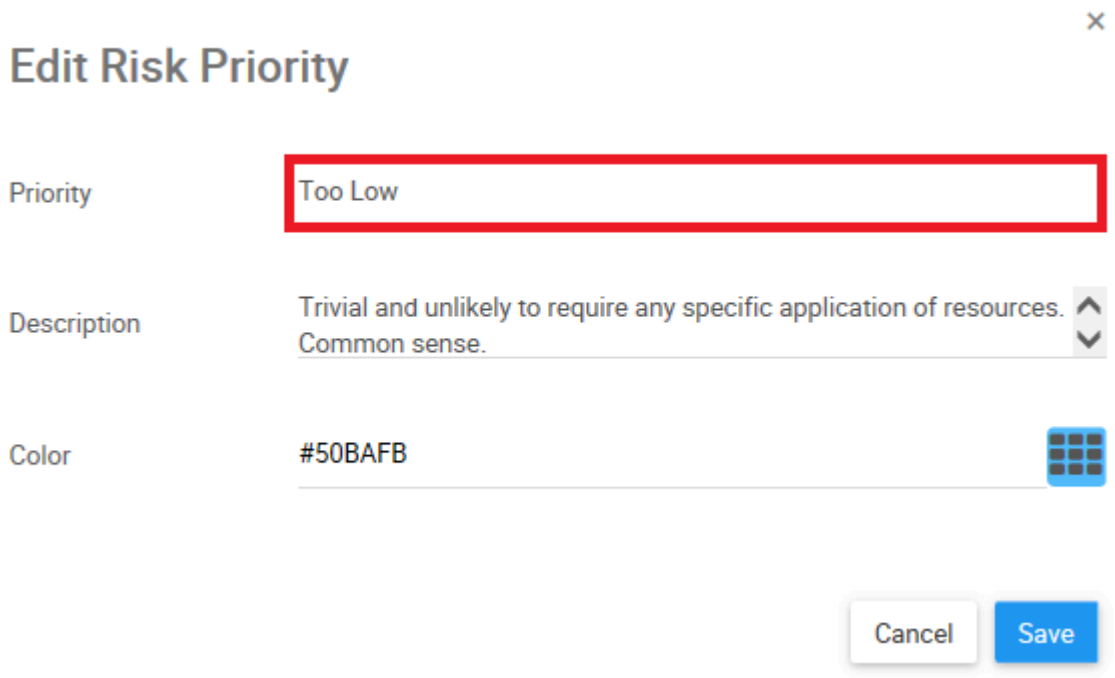
4. Select the Priority you want to edit. For this example, the “Too Low” priority is selected



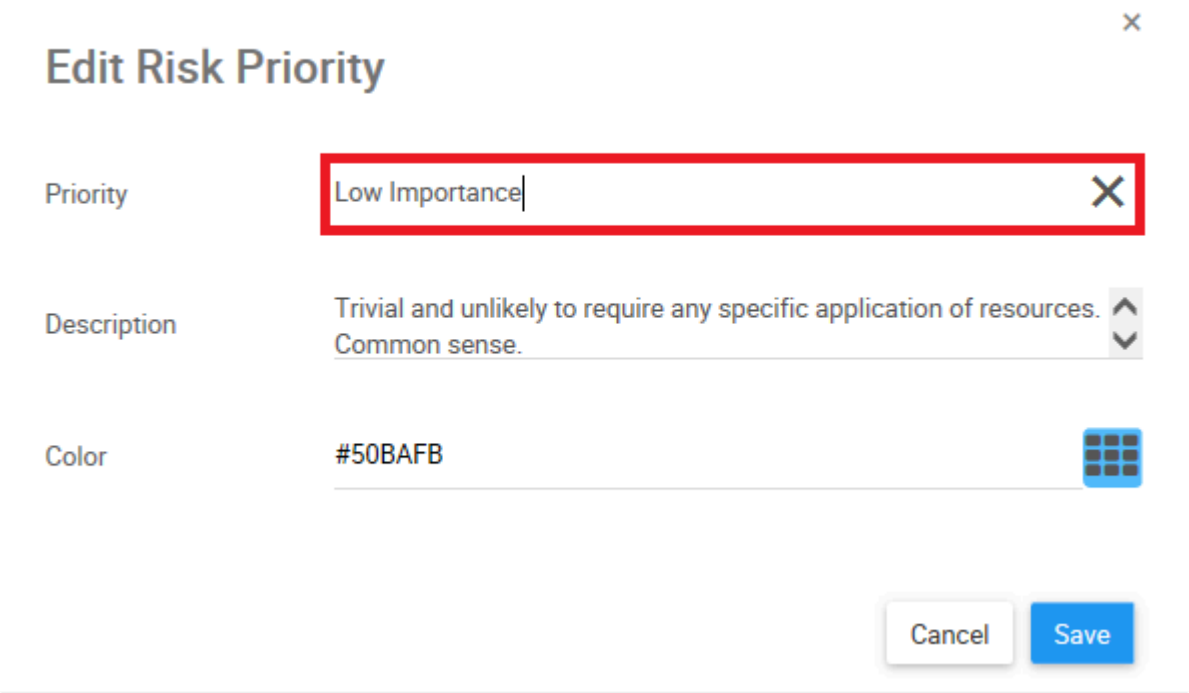
5. This will create a pop-up window allowing System Admins to fill in the appropriate information concerning the Priority.



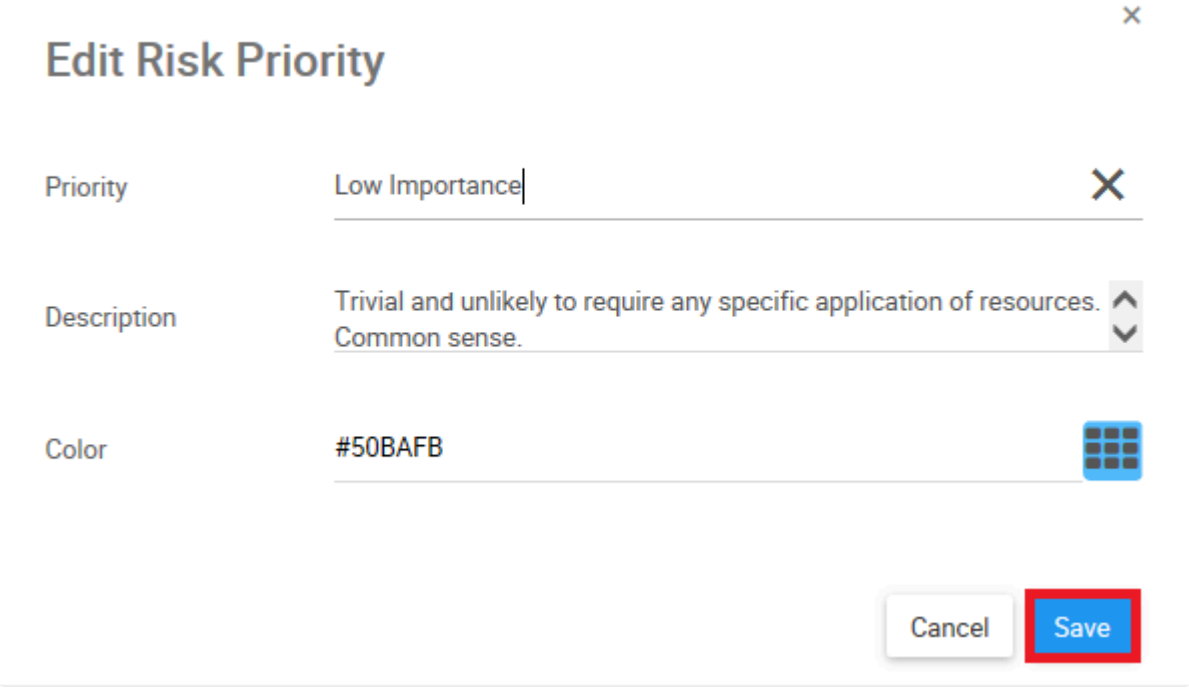
6. To edit the **Name** of the Risk Priority, select the Priority text box



7. For this example, type “Low Importance”



8. Select the Save button to confirm changes



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.

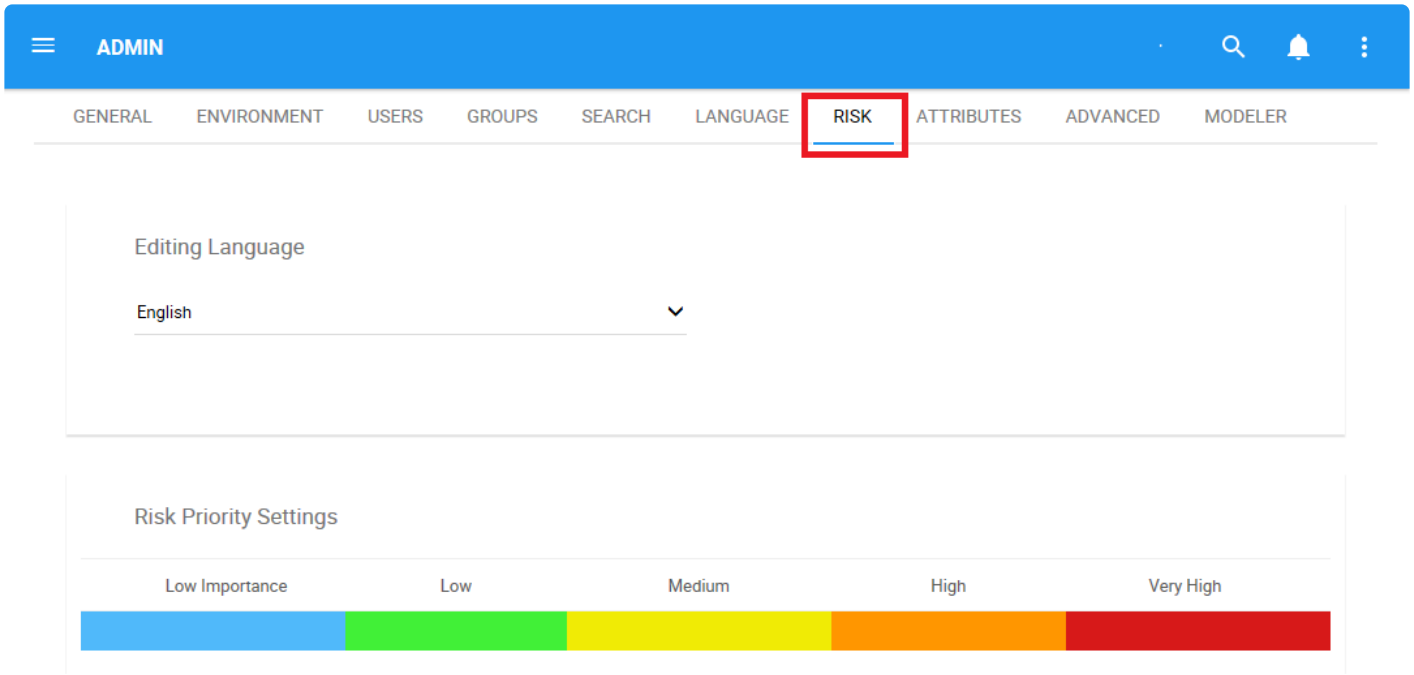
10.7.2.1.2 Edit Priority Description

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.

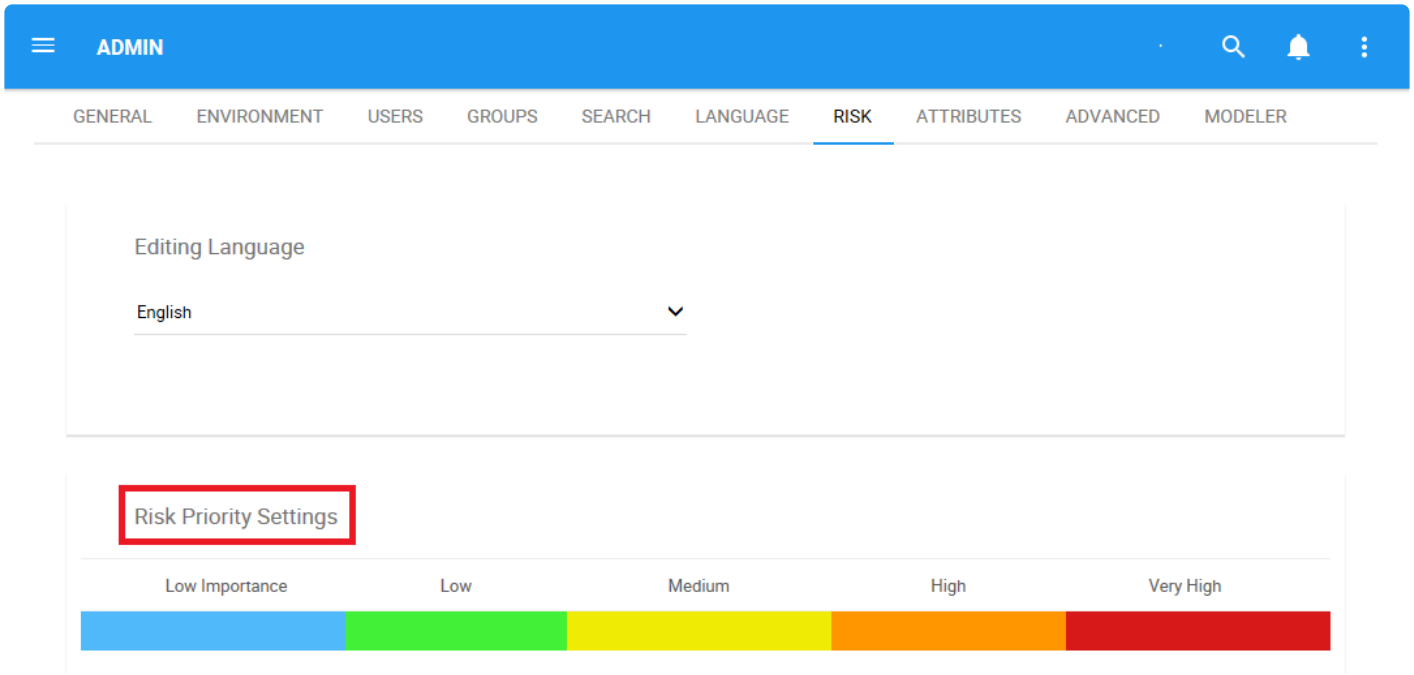
To Edit the Risk Priority Description, please follow the next steps

1. Navigate to the System Admin Section

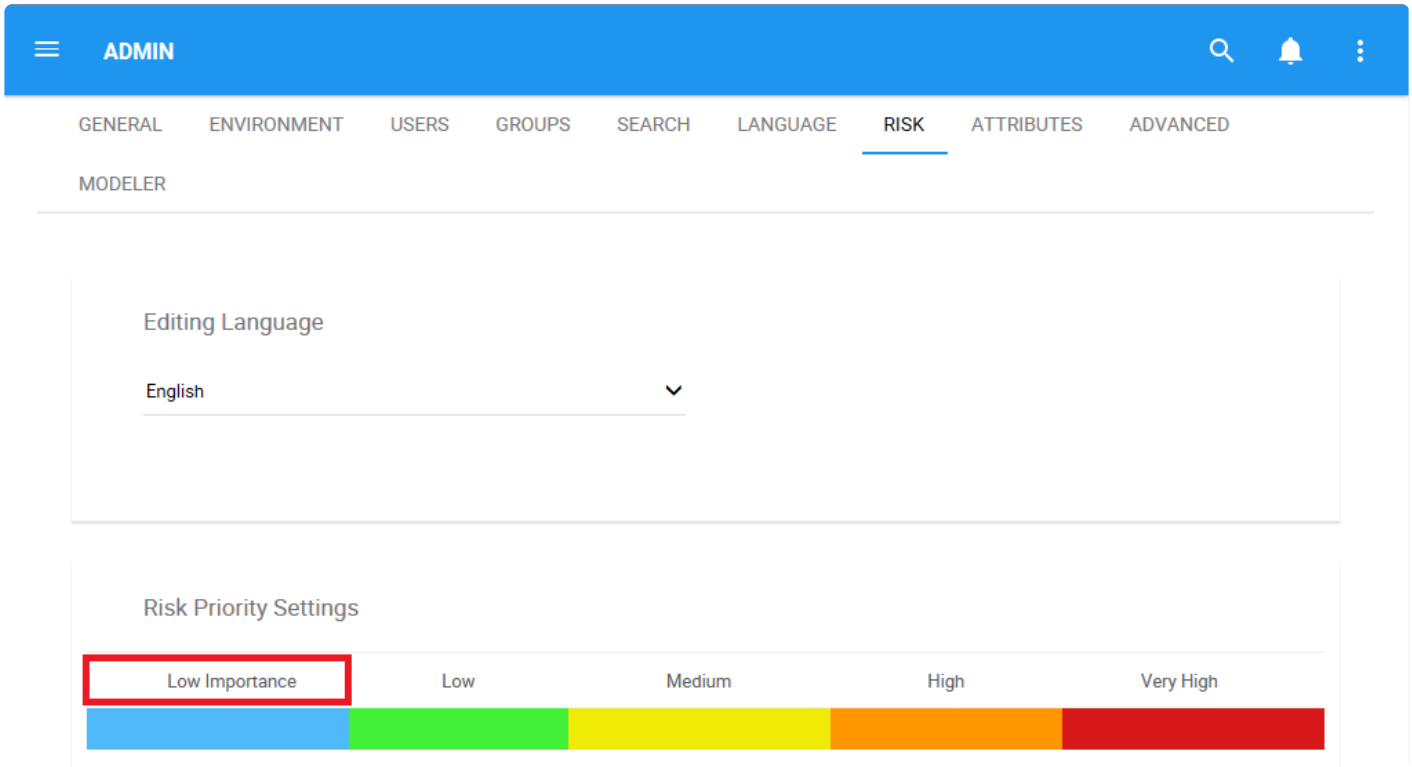
2. Select the Risk tab under the System Admin section



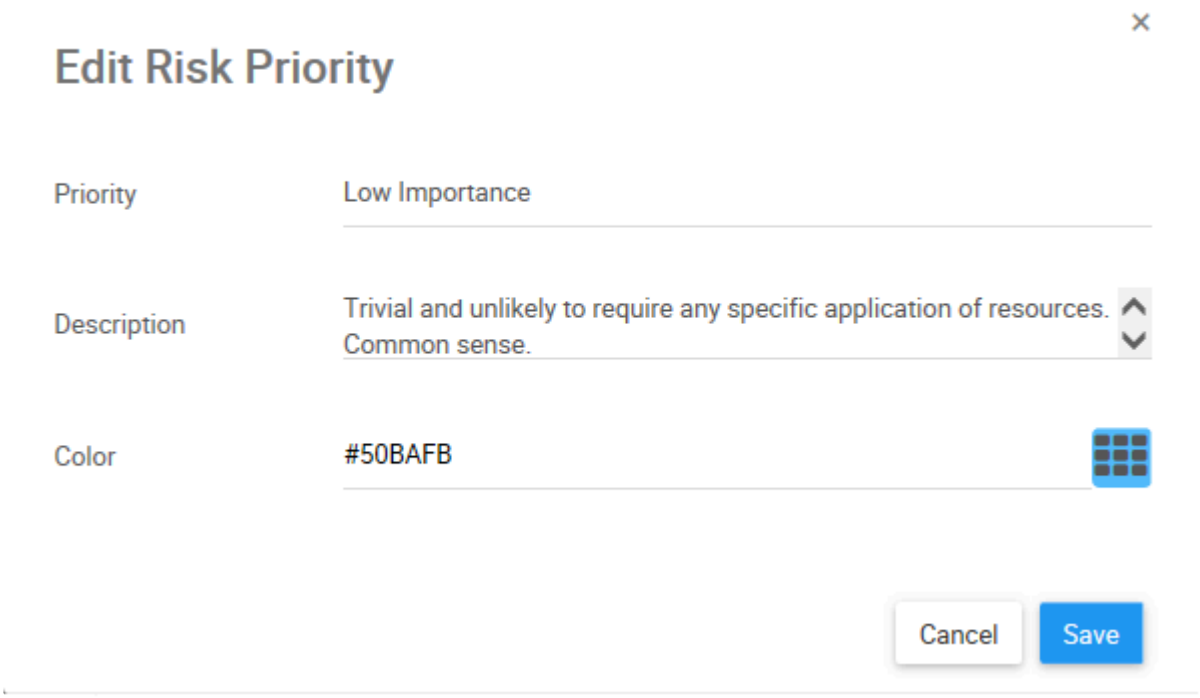
3. Navigate to the Risk Priority Settings section



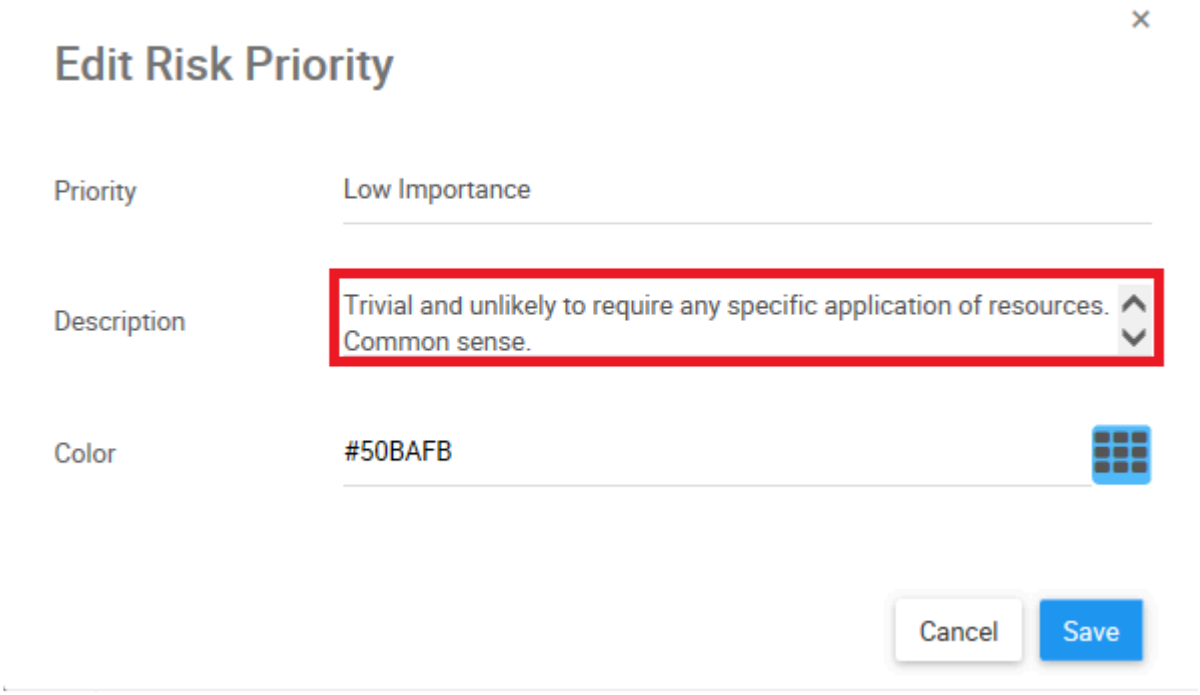
4. Select the Priority you want to edit. For this example, the “Low Importance” priority is selected



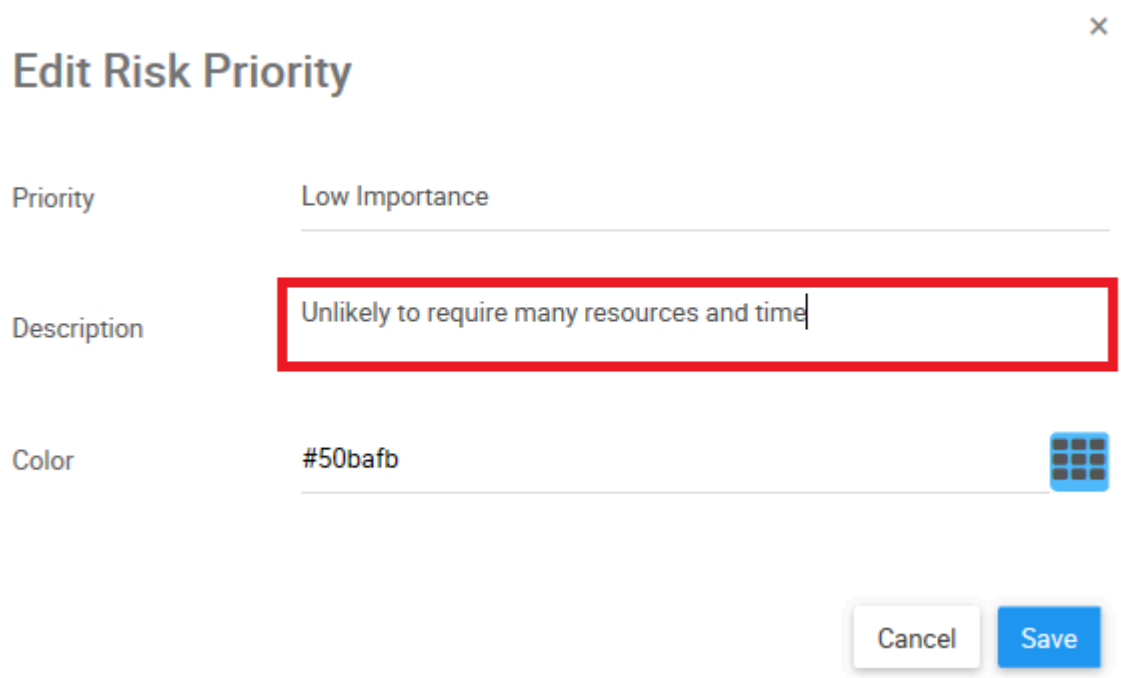
5. This will create a pop-up window allowing System Admins to fill in the appropriate information concerning the Priority.



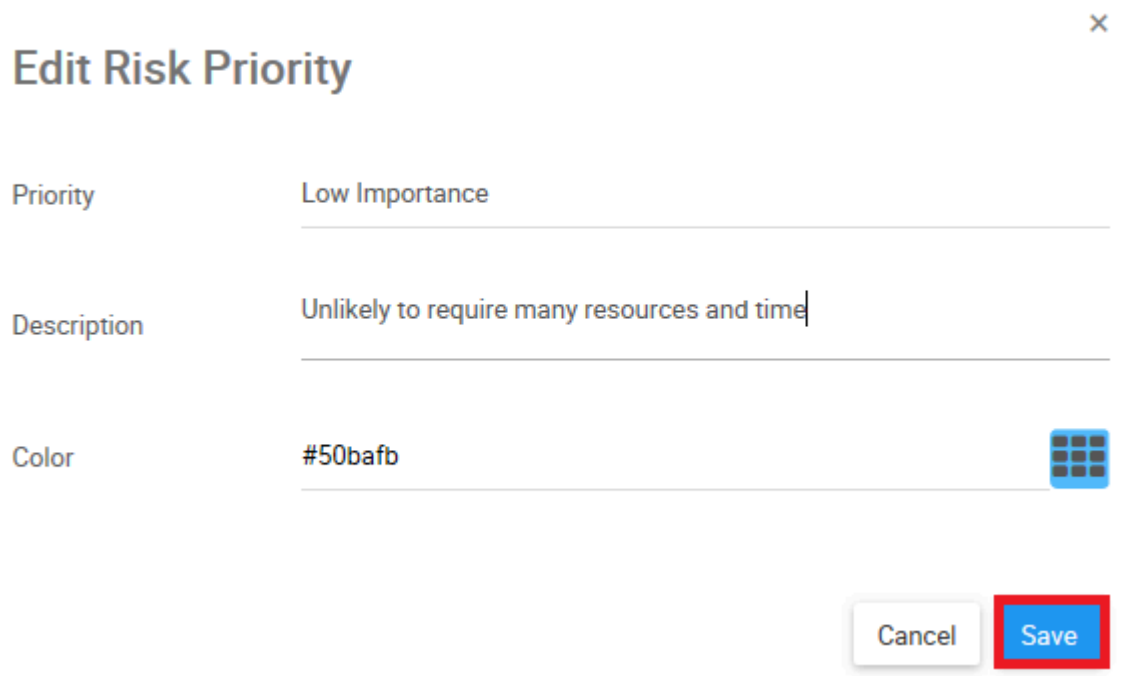
6. To edit the **Description** of the Risk Priority, select the Description text box



7. For this example, type the edited description “Unlikely to require many resources and time”



8. Select the Save button to confirm changes



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.

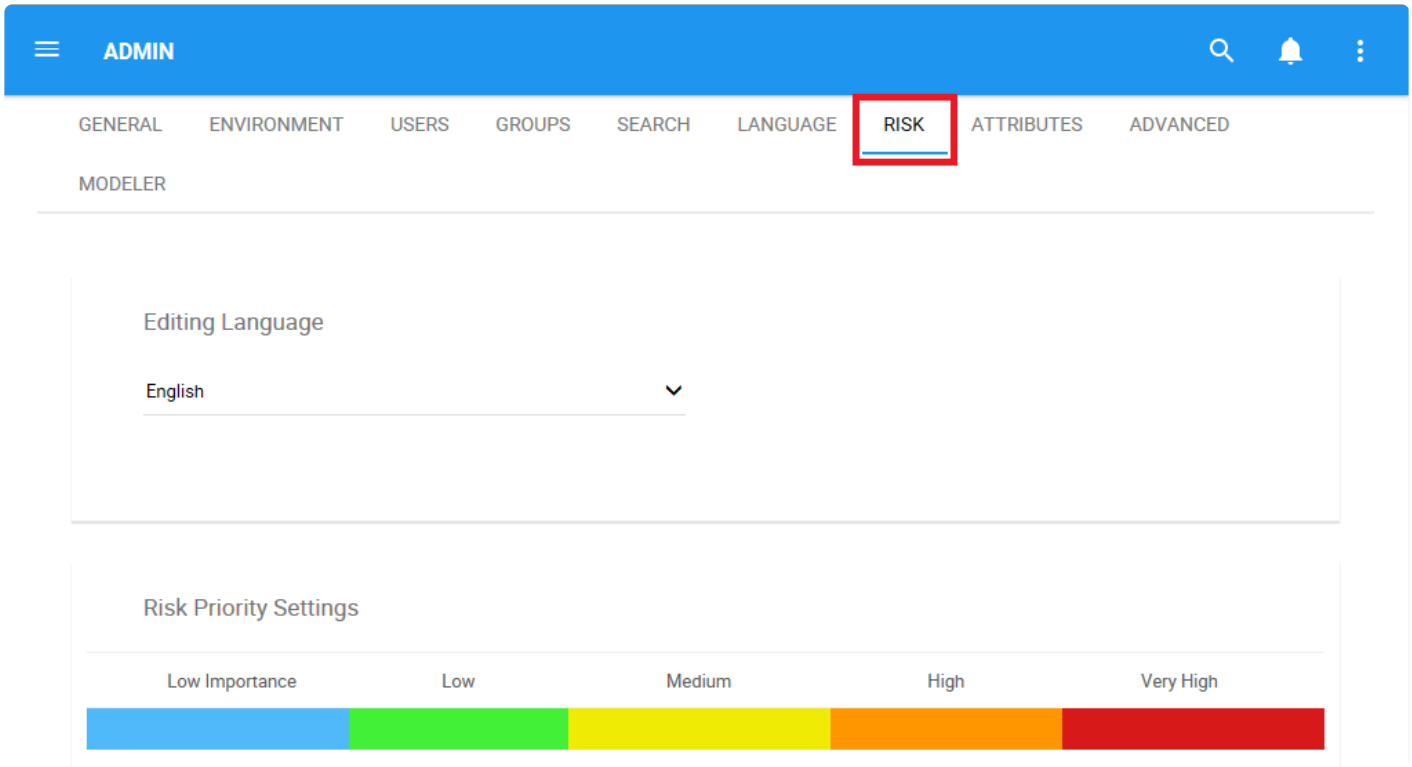
10.7.2.1.3 Edit Risk Priority Color

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

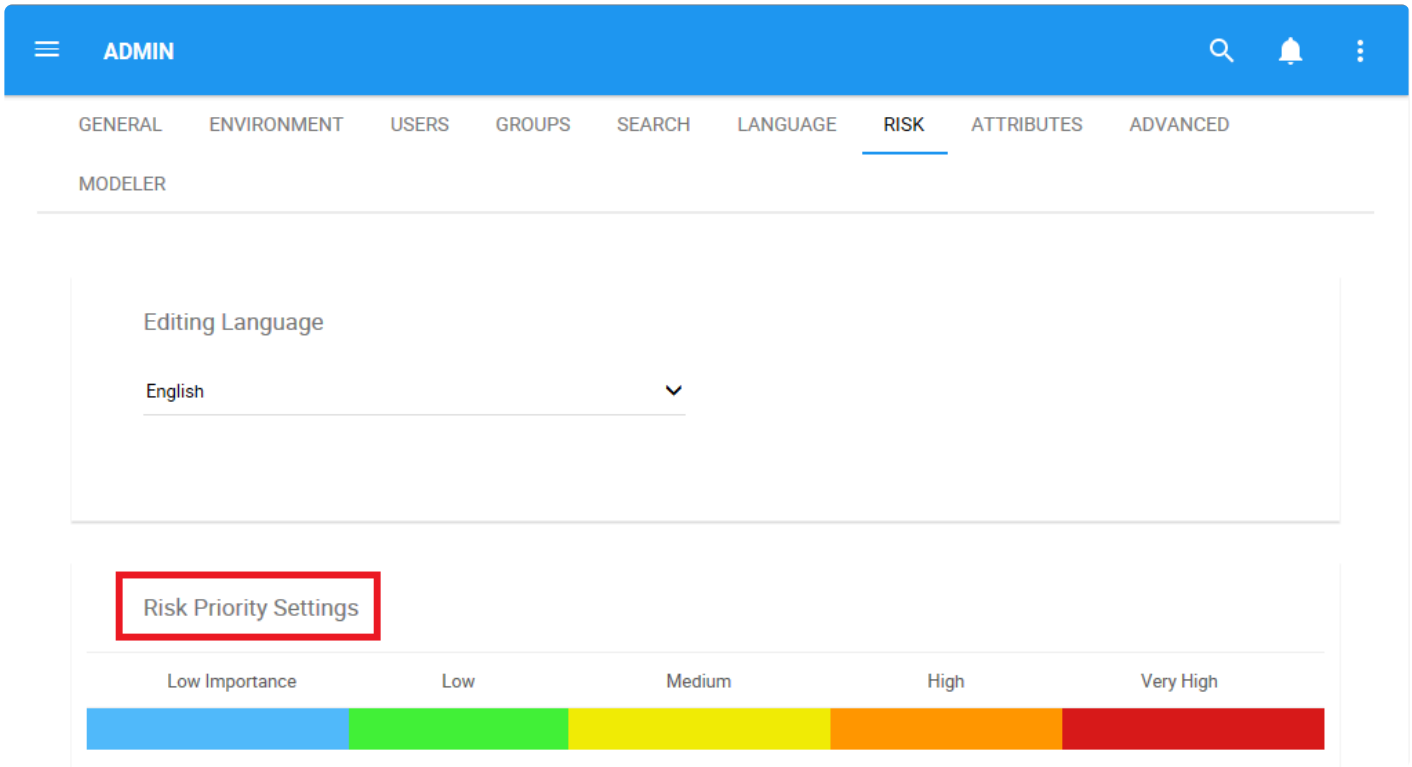
To Edit the Color of the Risk Priority, please follow the next steps

1. Navigate to the System Admin Section

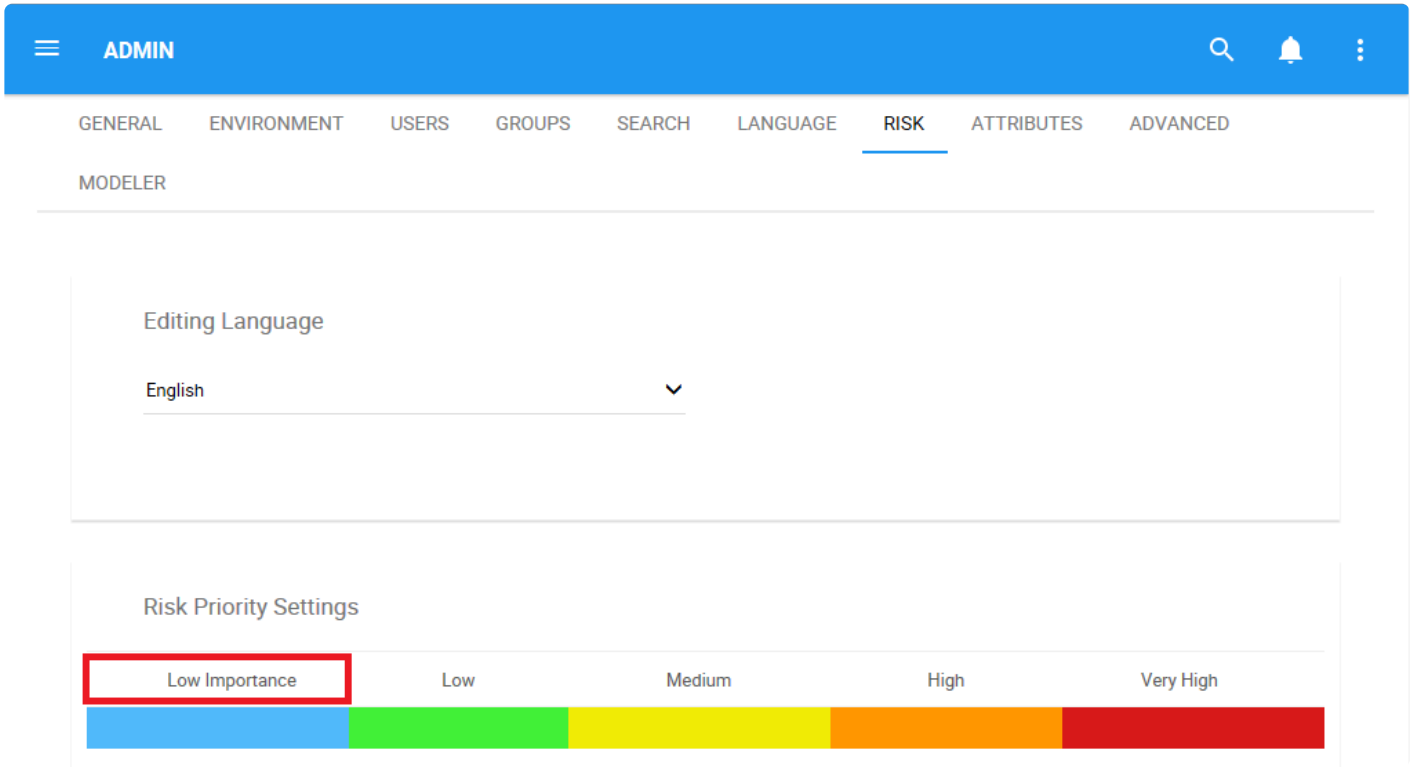
2. Select the Risk tab under the System Admin section



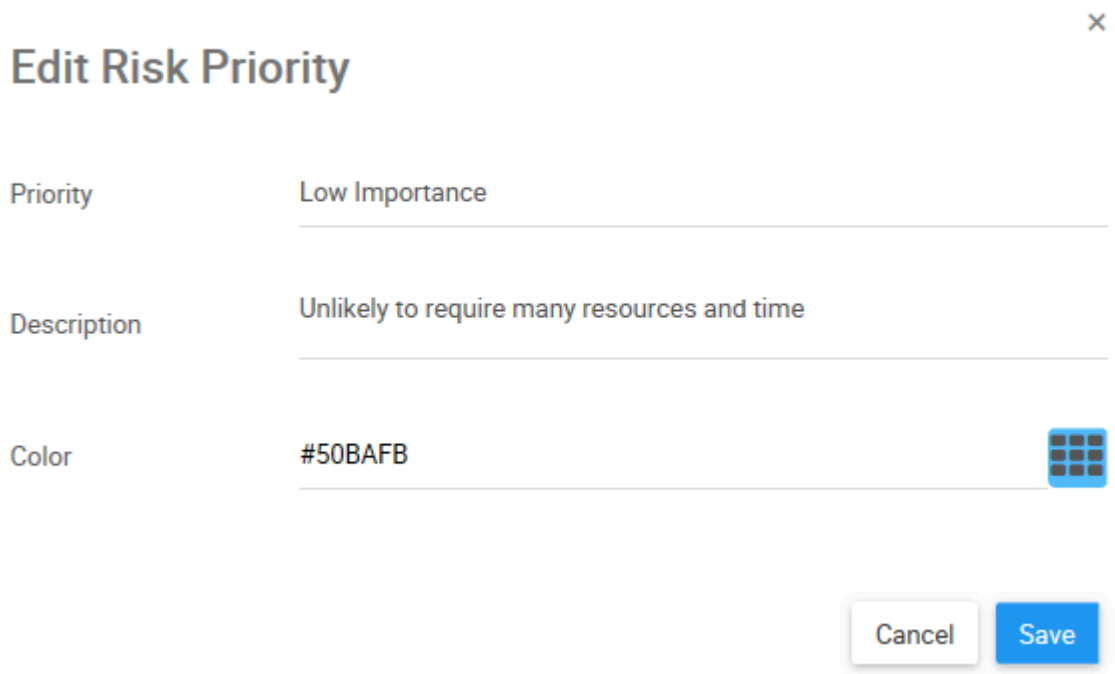
3. Navigate to the Risk Priority Settings section



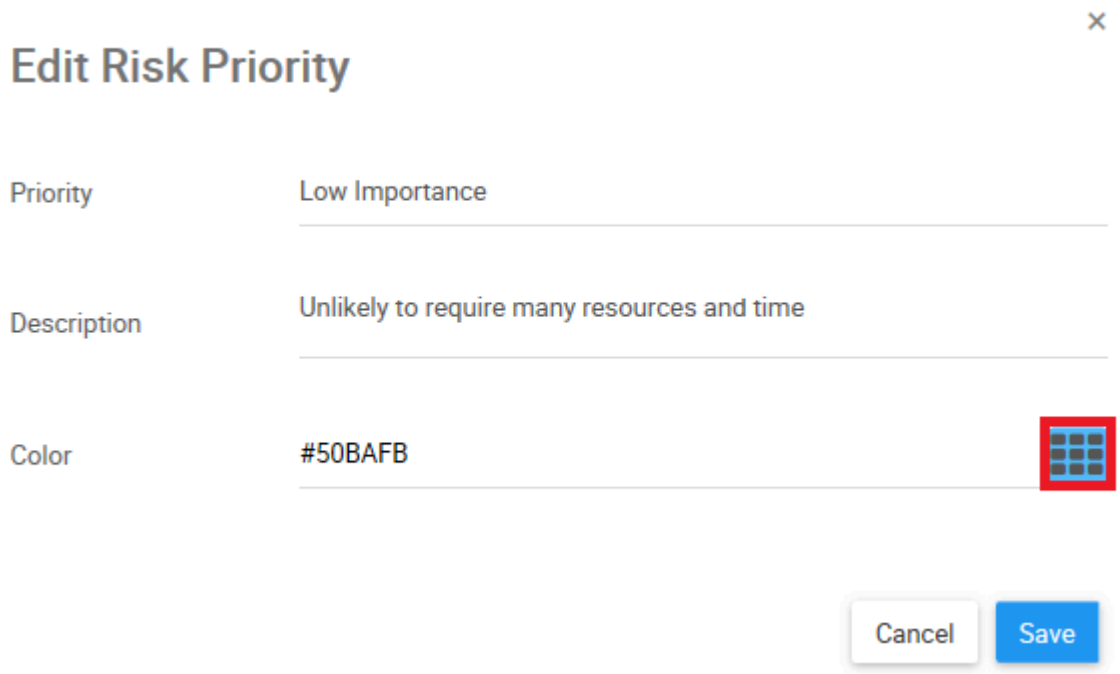
4. Select the Priority you want to edit. For this example, the “Low Importance” priority is selected



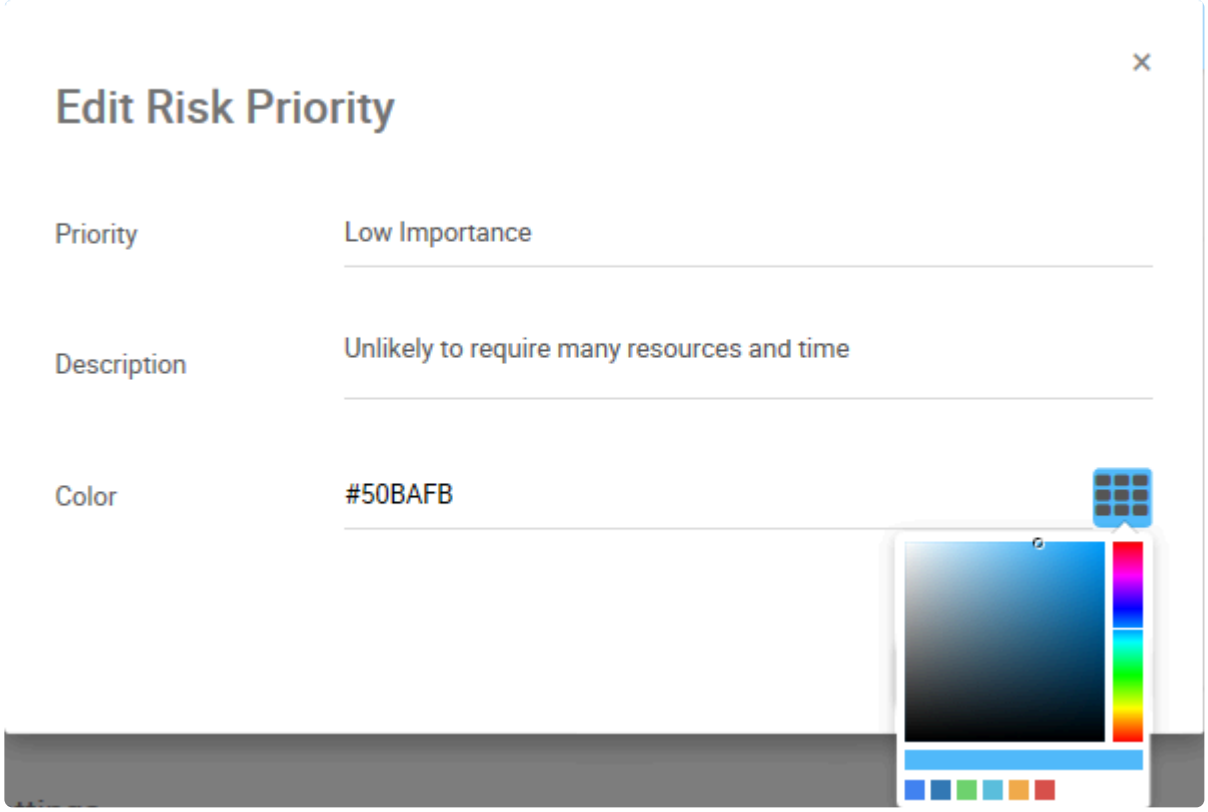
5. This will create a pop-up window allowing System Admins to fill in the appropriate information concerning the Priority.



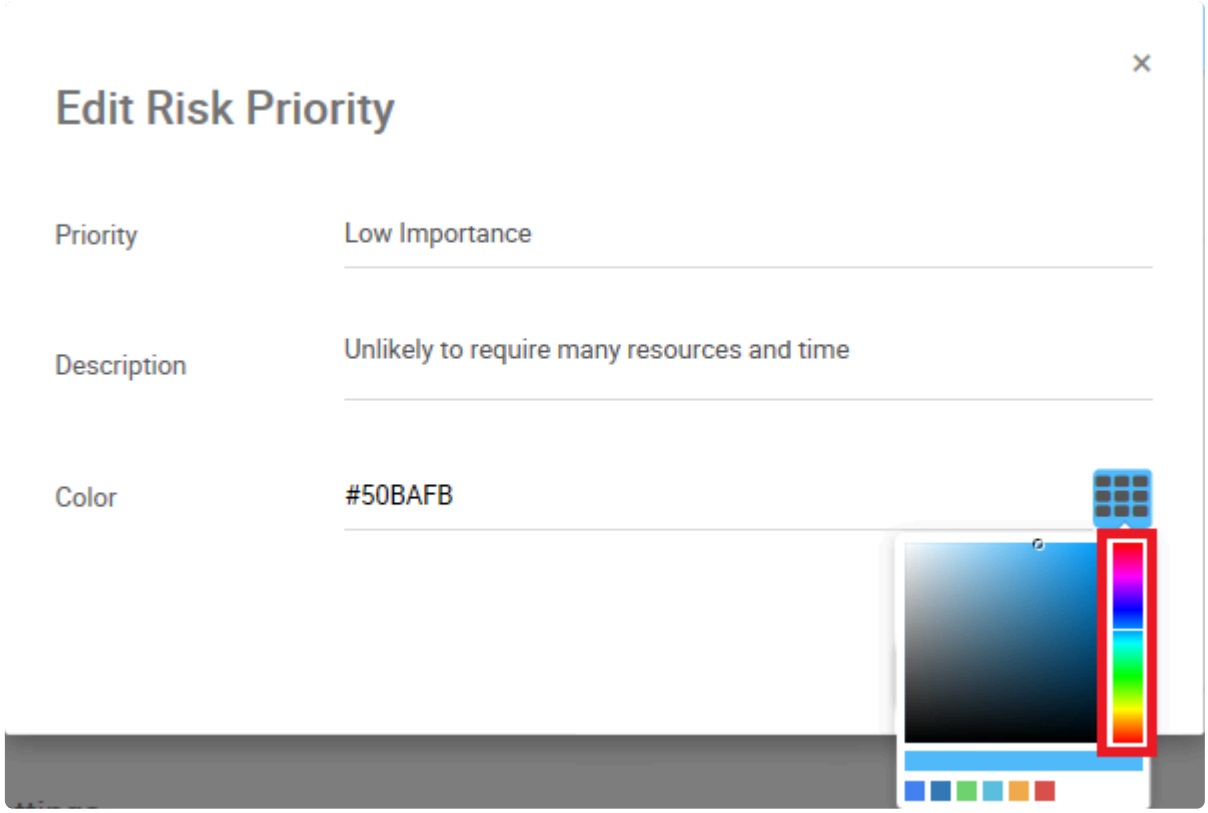
6. To edit the **Color** of the Risk Priority, select the icon

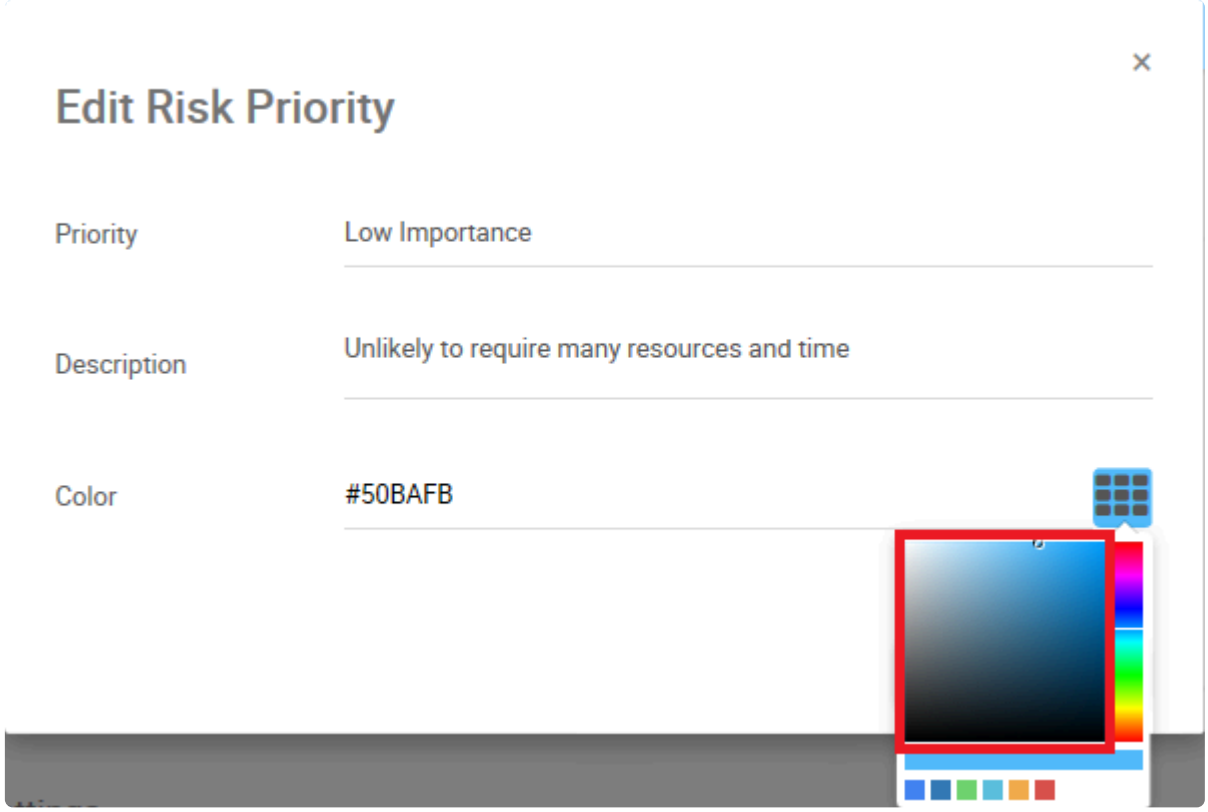


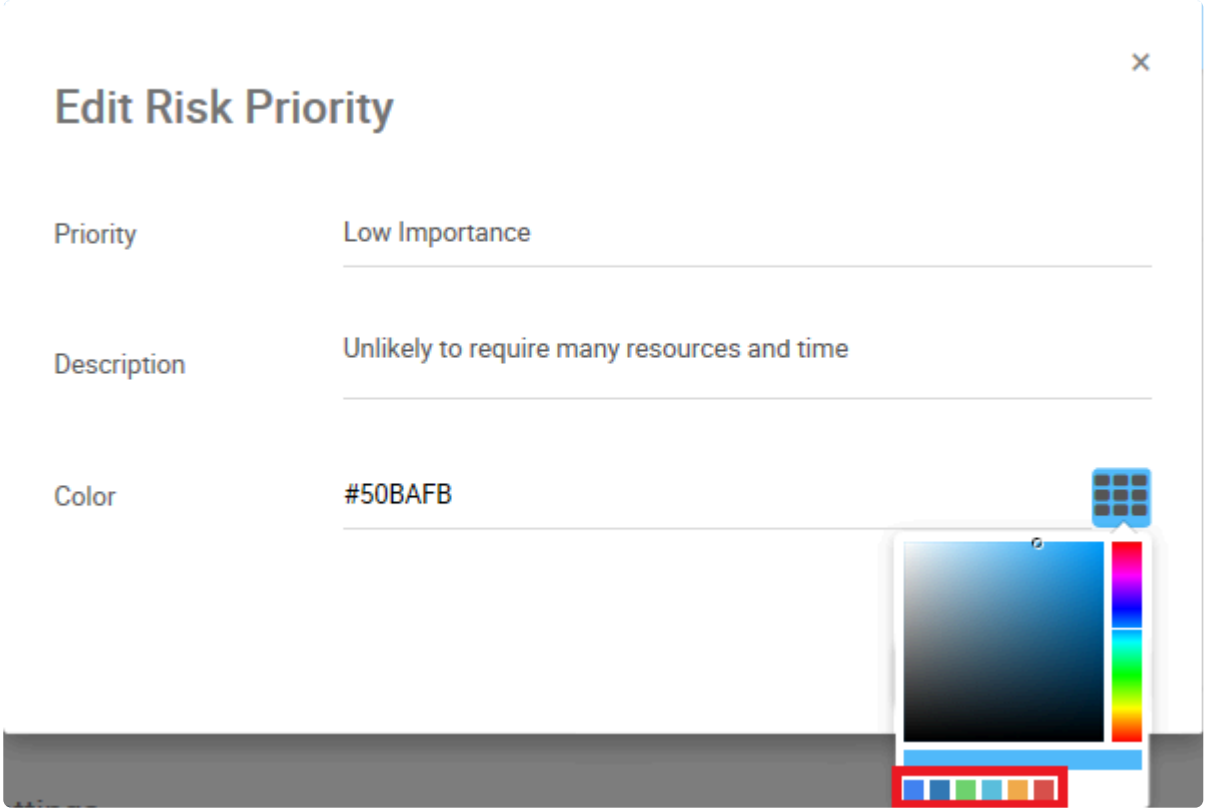
7. This will generate a drop-down menu featuring a color select window



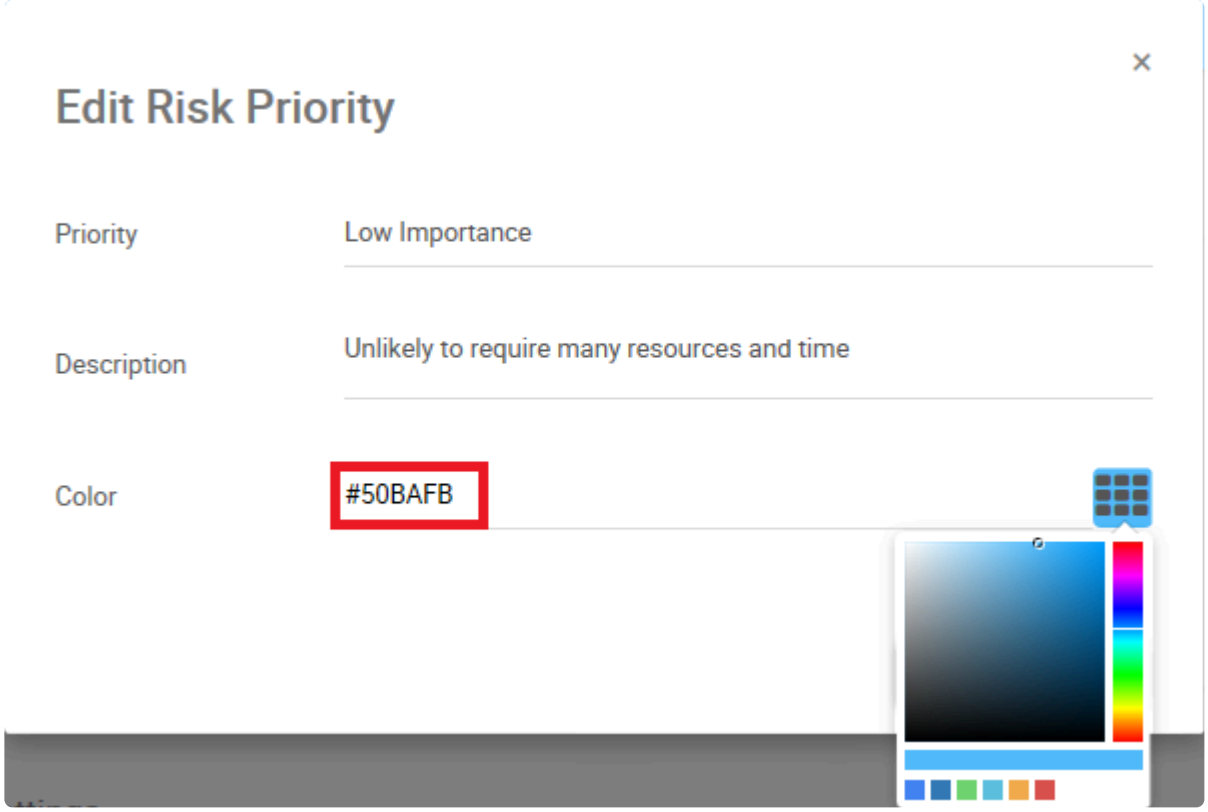
8. System Admin can select between the color bar a), shade b) and from c) preset colors by clicking on their desired selection

a) 

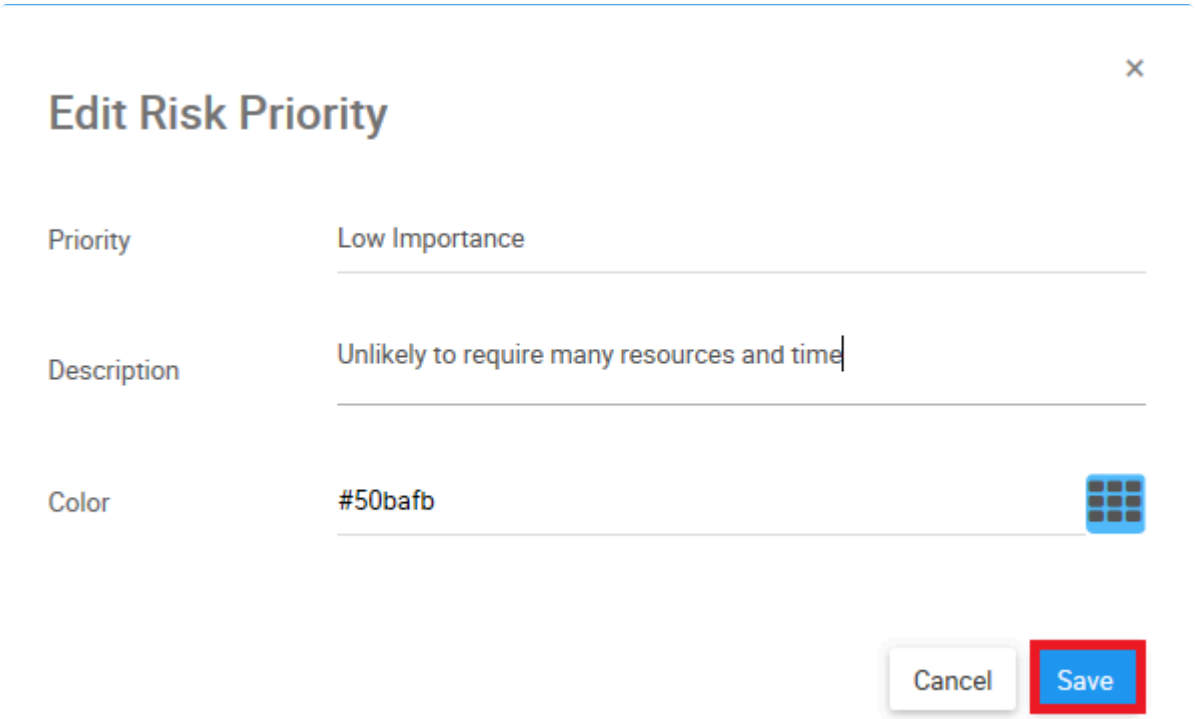
b) 

c) 

9. Select to color you desire. It will enter a new alphanumeric code in the text box.



8. Select the Save button to confirm changes



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

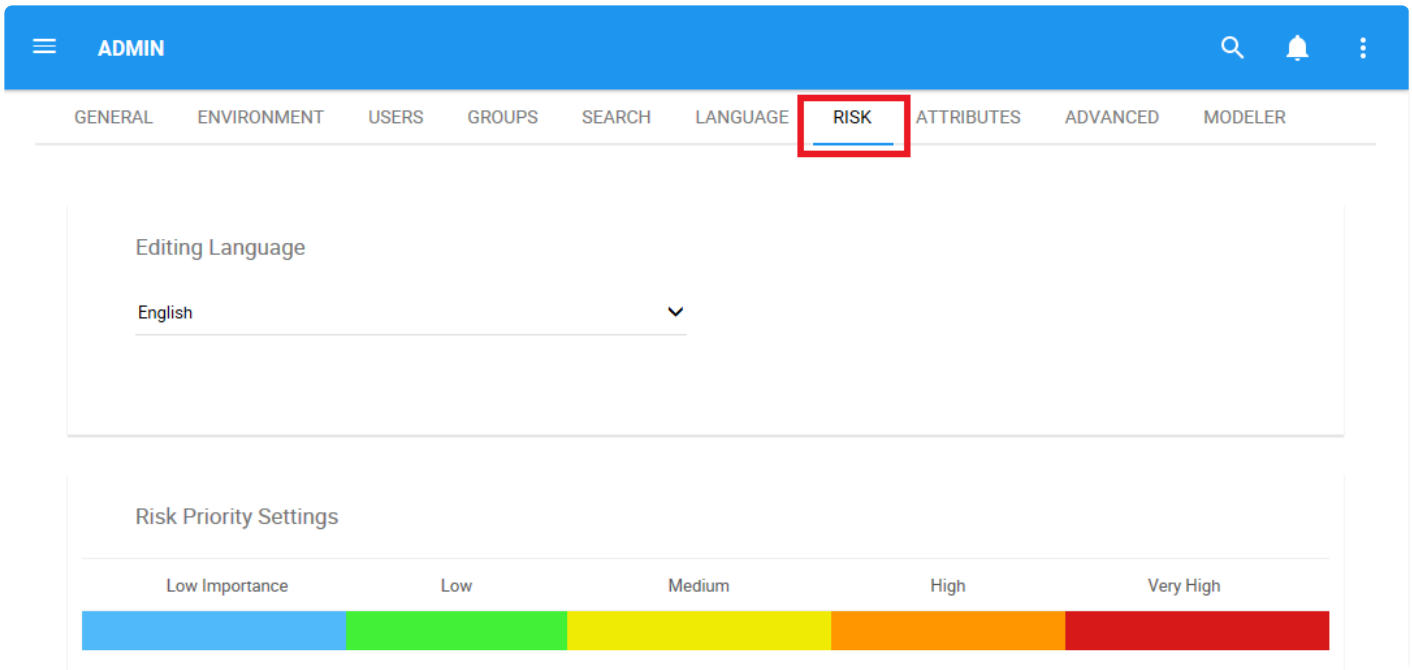
10.7.2.2 Edit Risk Priority Language

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

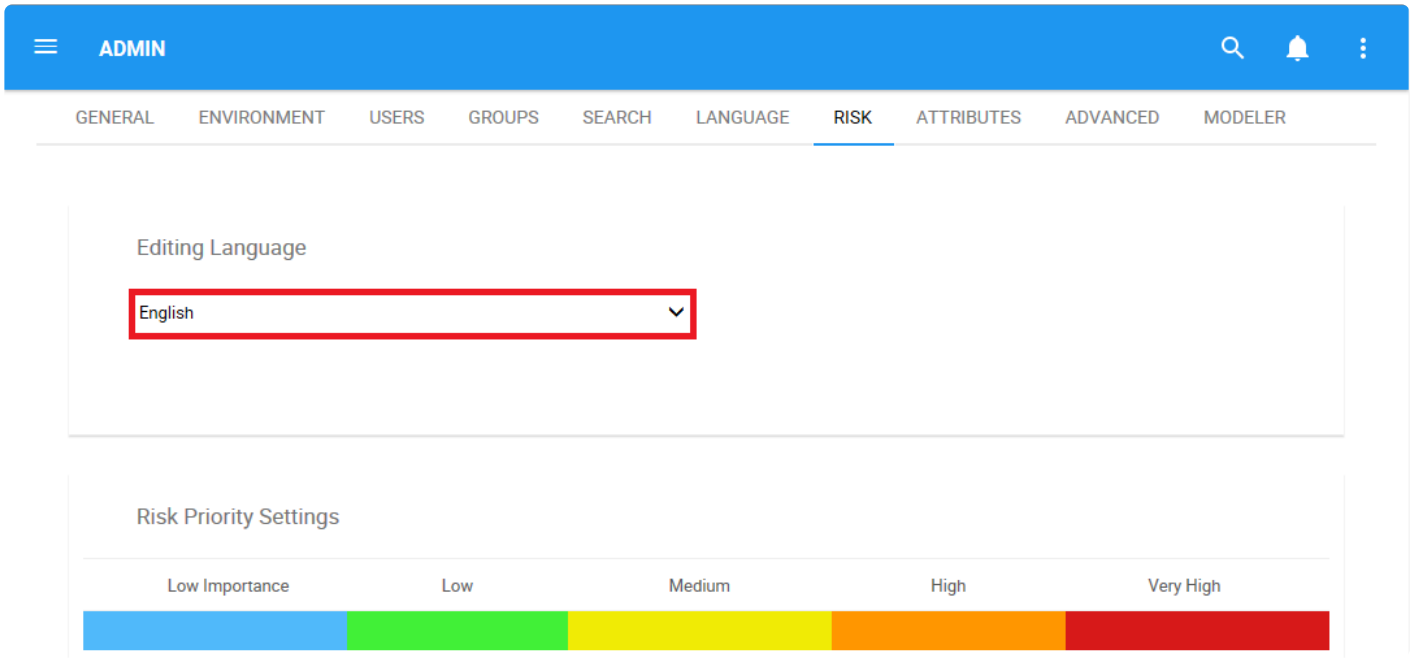
To Edit the Risk Priority Settings in a different language, follow the next steps

1. Navigate to the System Admin Section

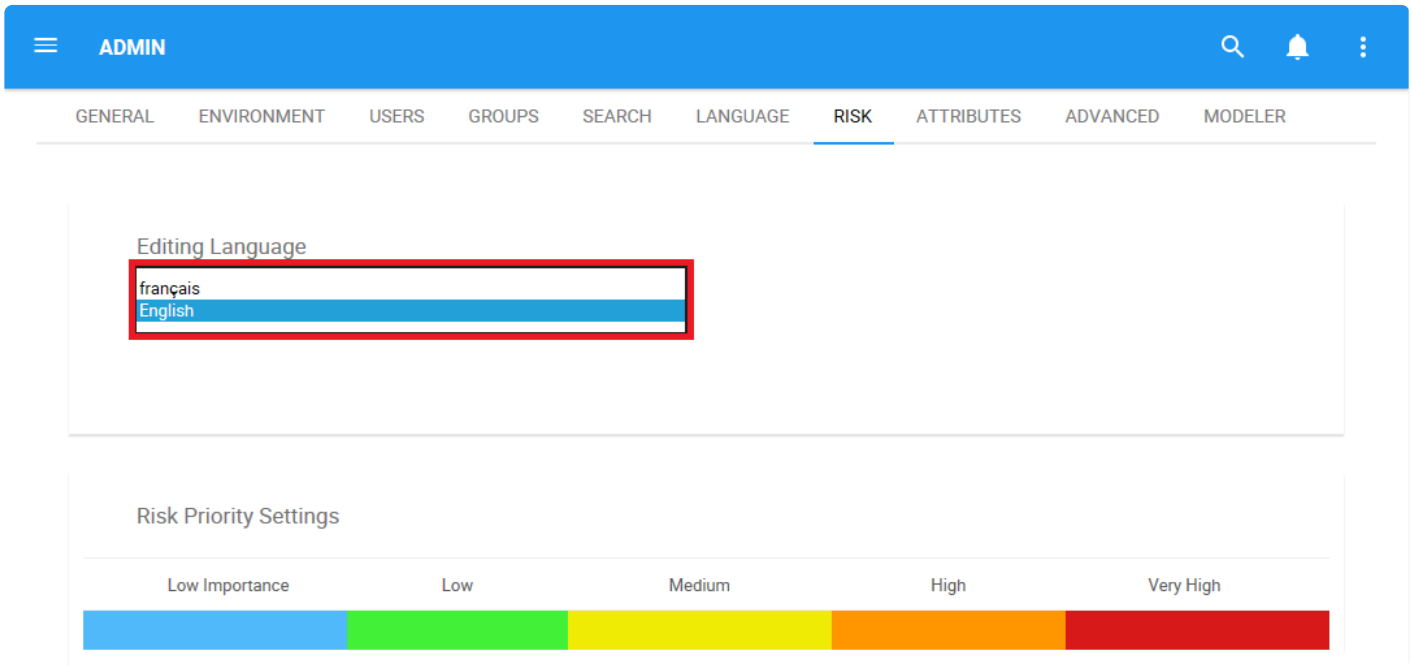
2. Select the Risk tab under the System Admin section



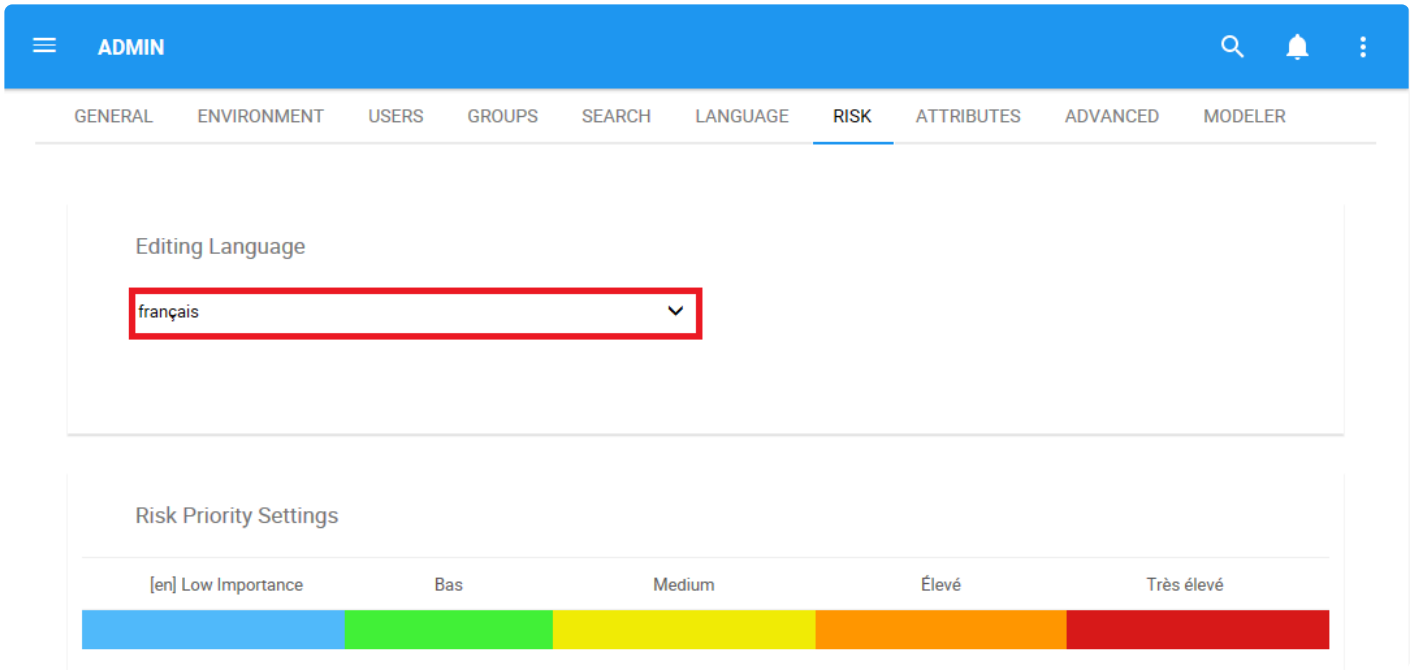
3. Navigate to the Editing Language section and select the “English” box



4. This will generate a drop-down menu featuring the languages you are allowed to use and create content for

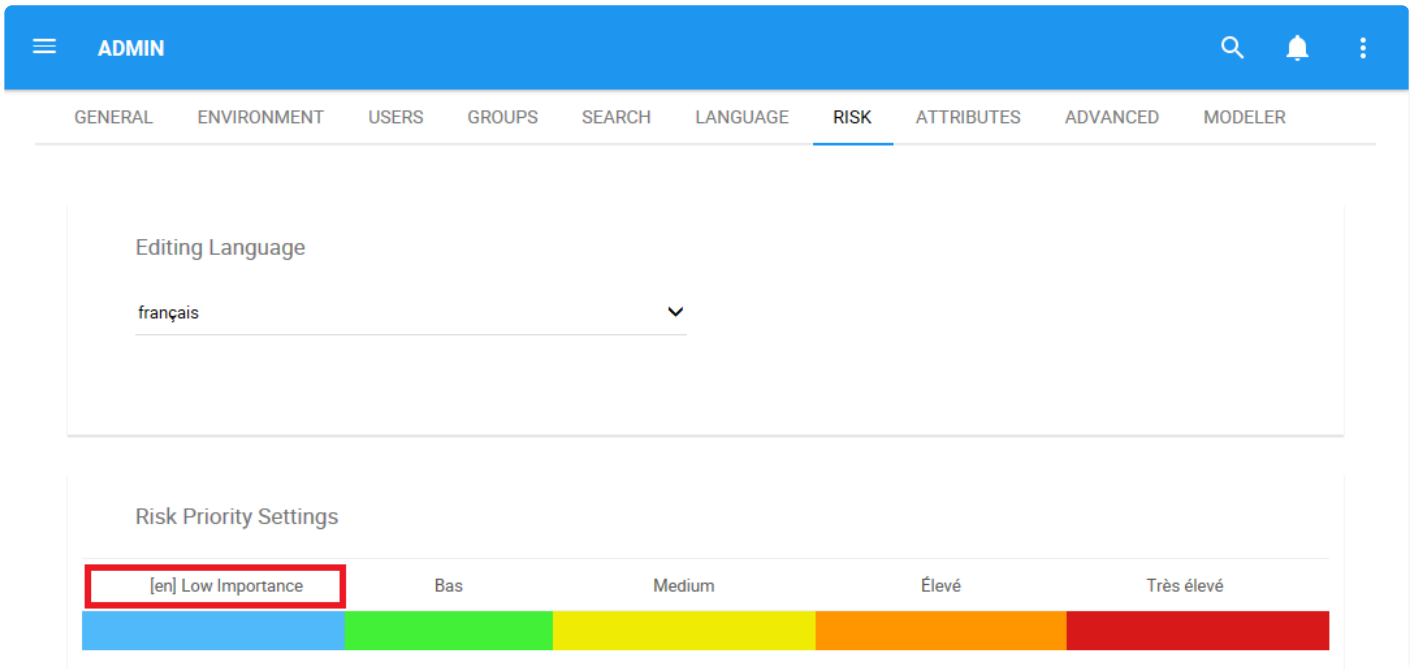


5. Select the language you want to create Risk Priority content for. For this example, French is chosen.



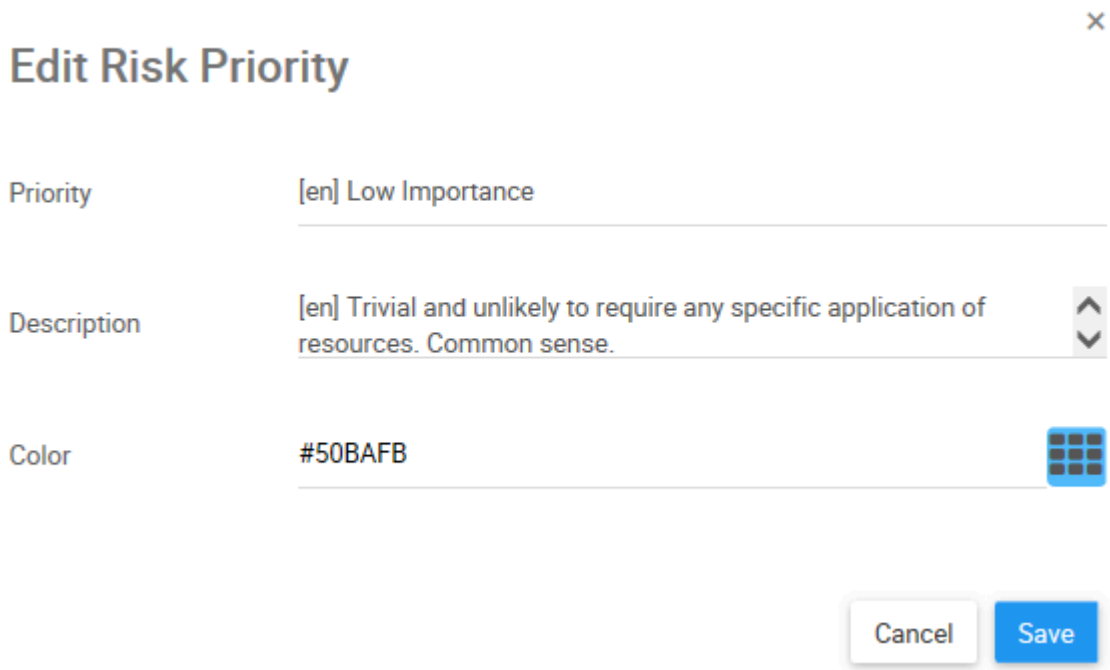
6. Navigate to the Risk Priority Settings section, and click on the Priority you want to edit. For this example, select “[en] Low Importance”

> When the content is available in another language, the language abbreviation in brackets will be displayed. Refer to the section Understanding Content Languages

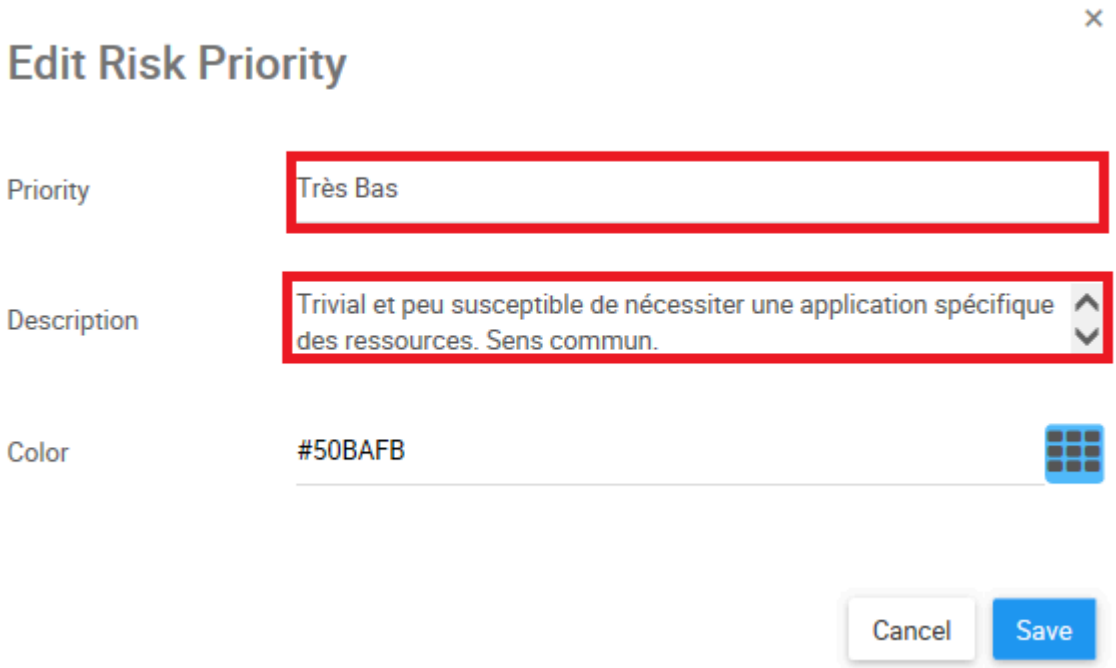


7. This will create a pop-up window with the current English Priority Name, English Description and Color.

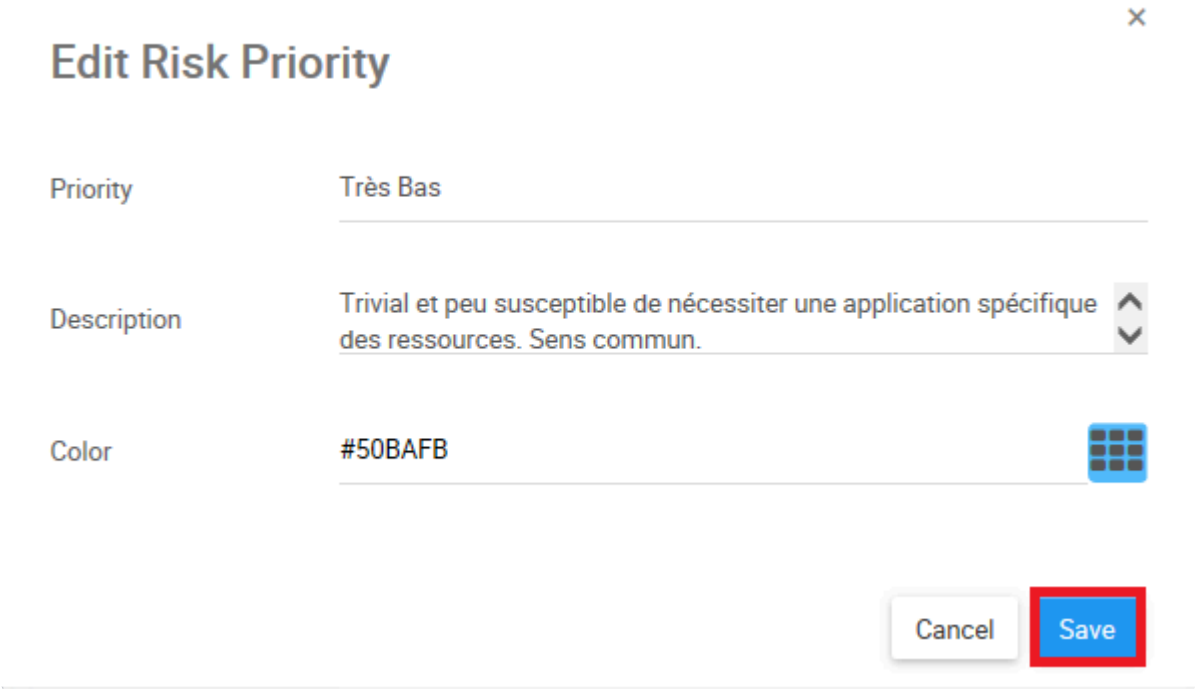
When the content is available in another language, the language abbreviation in brackets will be displayed. Refer to the section Understanding Content Languages



8. 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



9. Select the Save box to confirm changes



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

Impact \ Likelihood	1 Very Low	2 Low	3 Frequent	4 High	5 Very High
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.

Impact \ 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

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

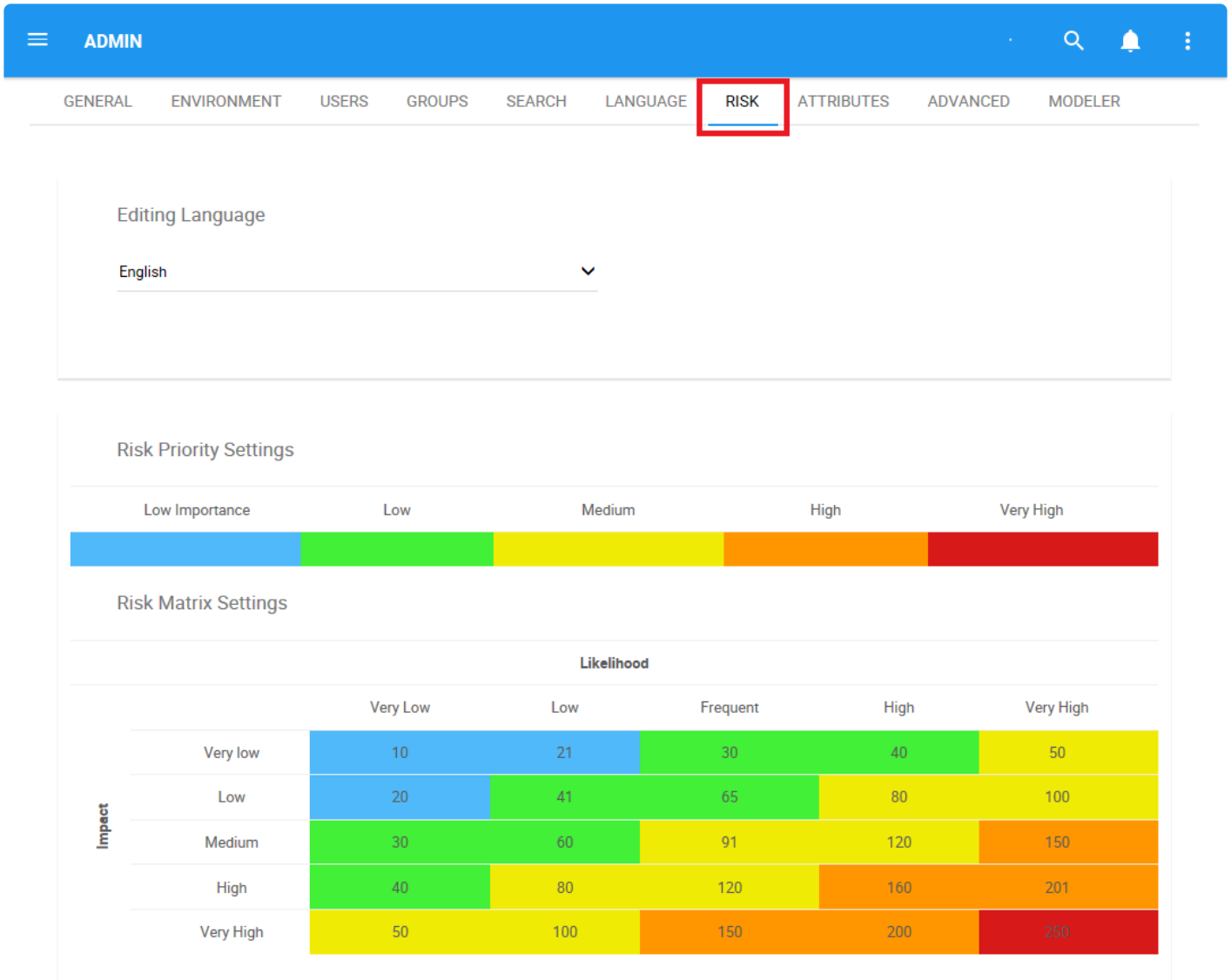
10.7.3.1.1.1 Edit Risk Likelihood Name

A Name is given by the System Admin to each Risk Likelihood to label them.

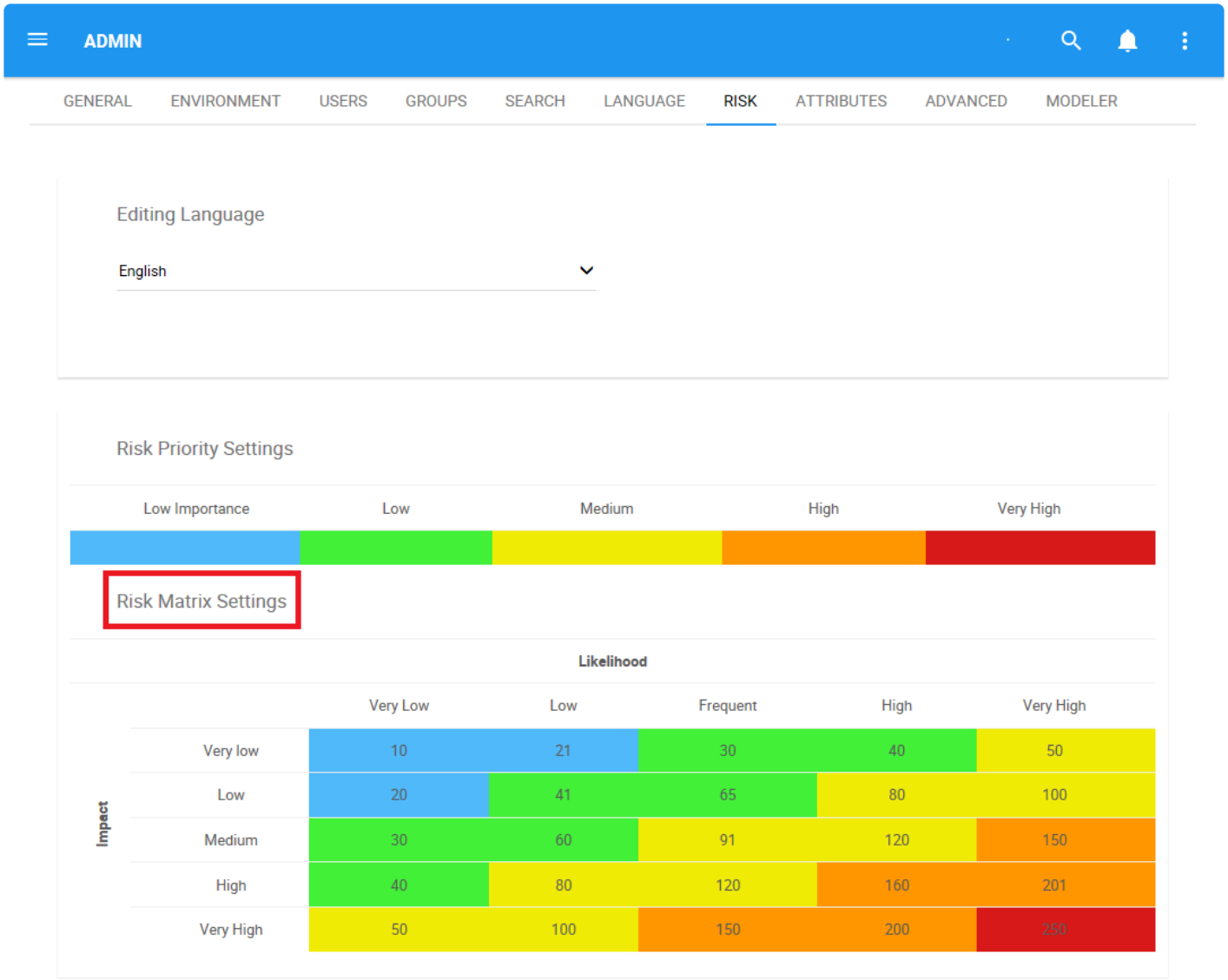
To Edit the Risk Likelihood Name, please follow the next steps

1. Navigate to the System Admin Section

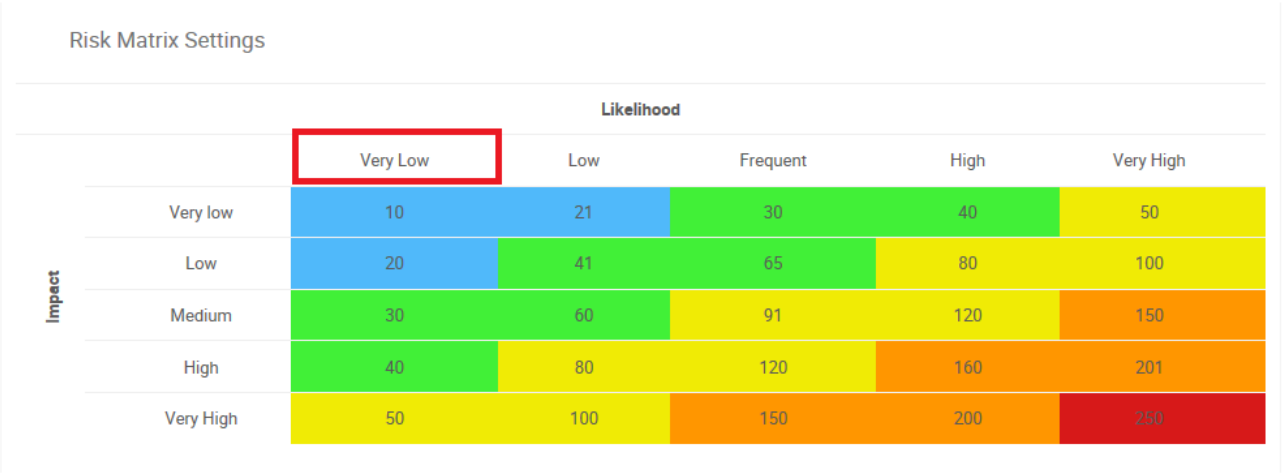
2. Select the Risk tab under the System Admin section



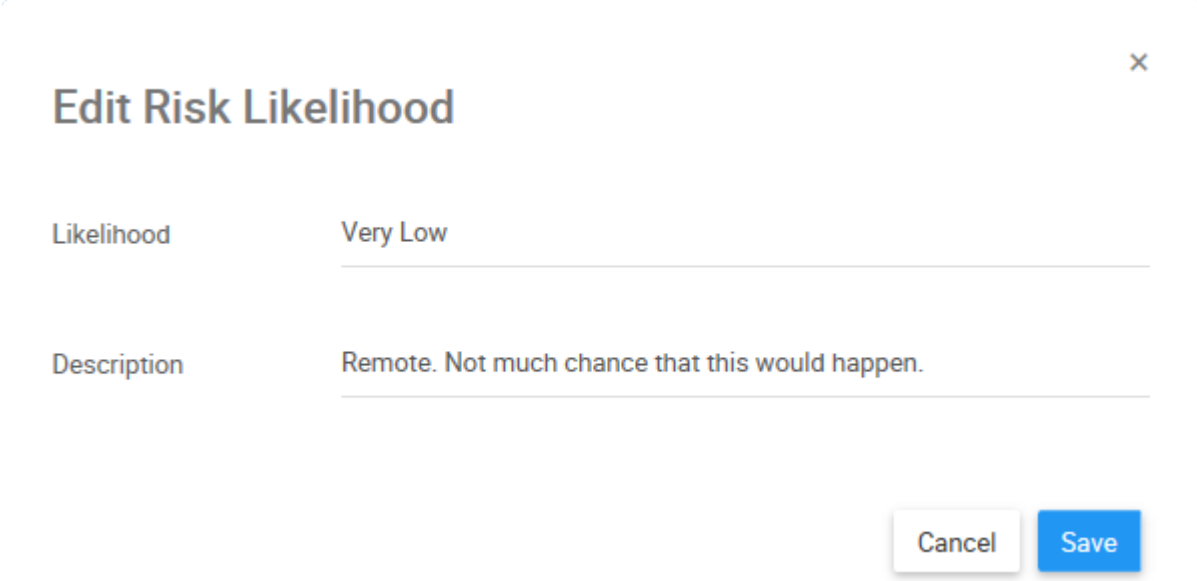
3. Navigate to the Risk Matrix Settings section



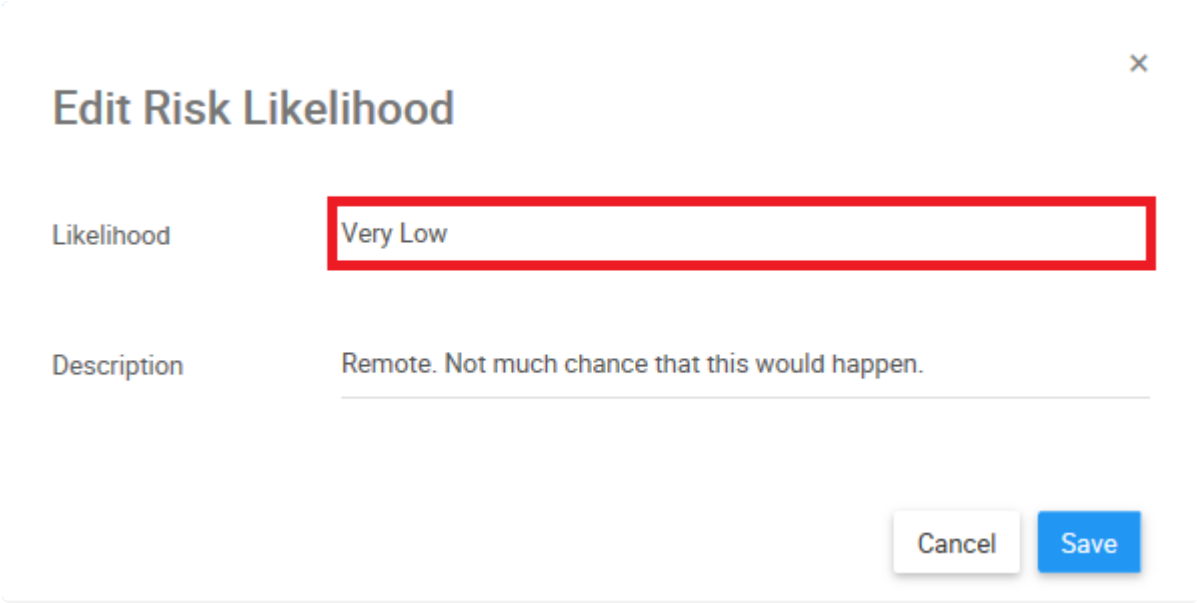
4. Select the Risk Likelihood you want to edit. For this example, the “Very Low” Likelihood is selected



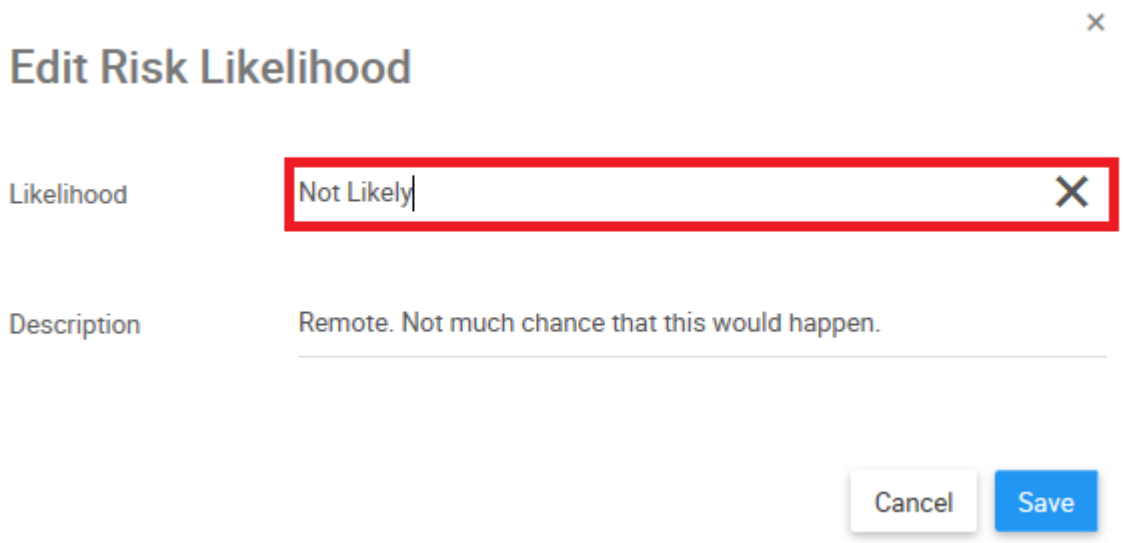
5. This will create a pop-up window allowing System Admins to fill in the appropriate information concerning the Risk Likelihood



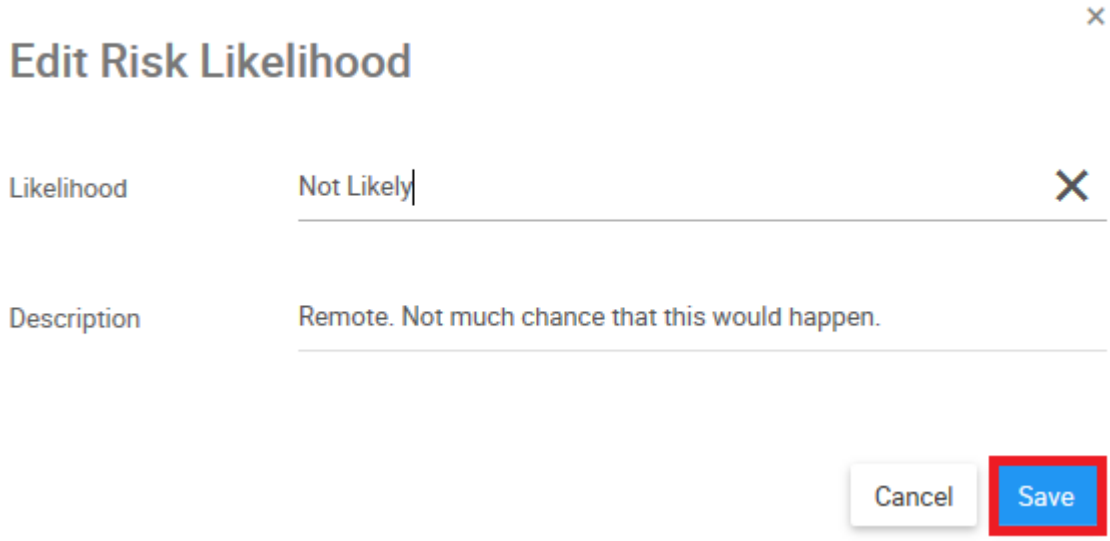
6. To edit the **Name** of the Risk Likelihood, select the Likelihood text box



7. For this example, type the “Not Likely”



8. Select the Save button to confirm changes



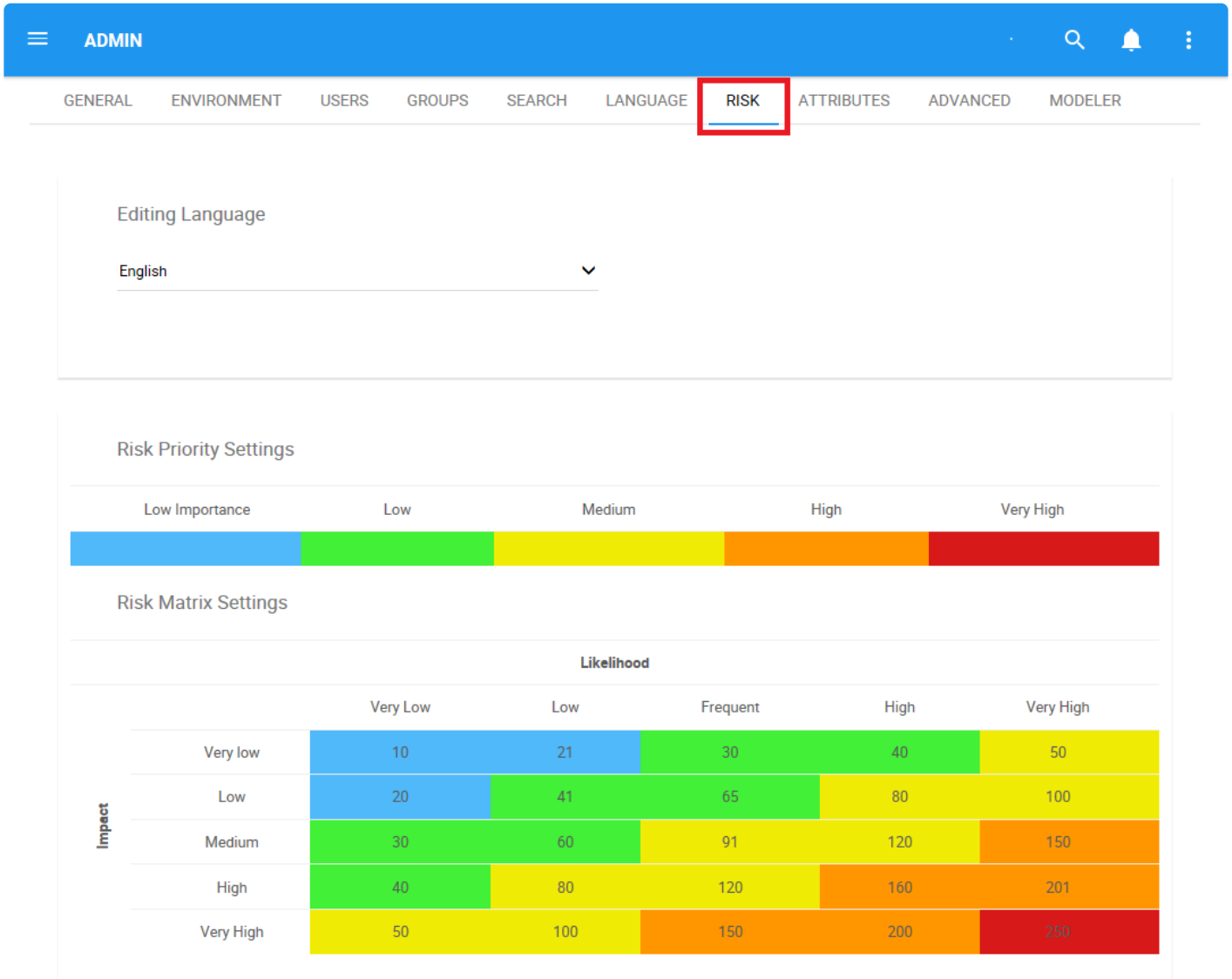
10.7.3.1.1.2 Edit Risk Likelihood Description

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.

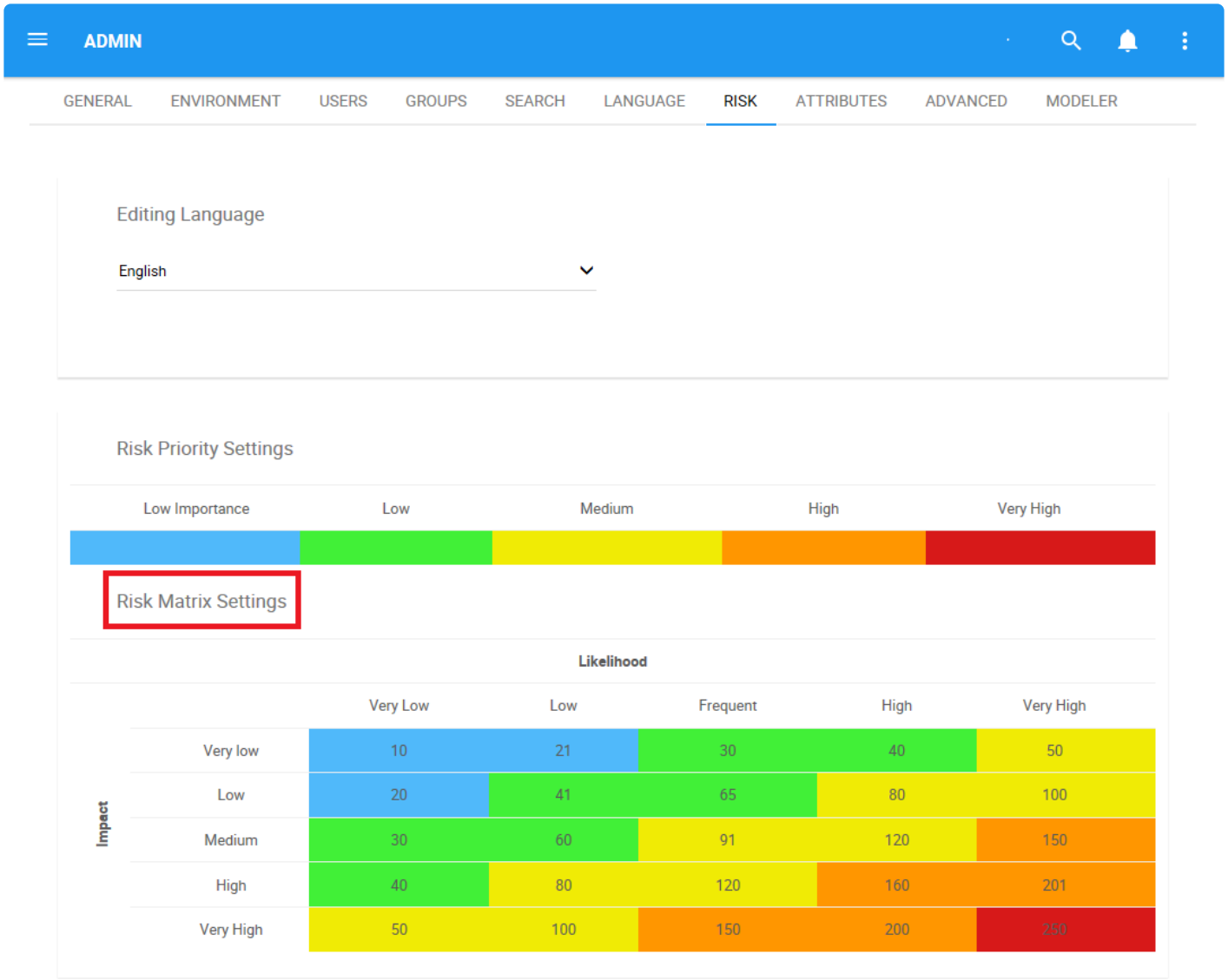
To Edit the Risk Likelihood Description, please follow the next steps

1. Navigate to the System Admin Section

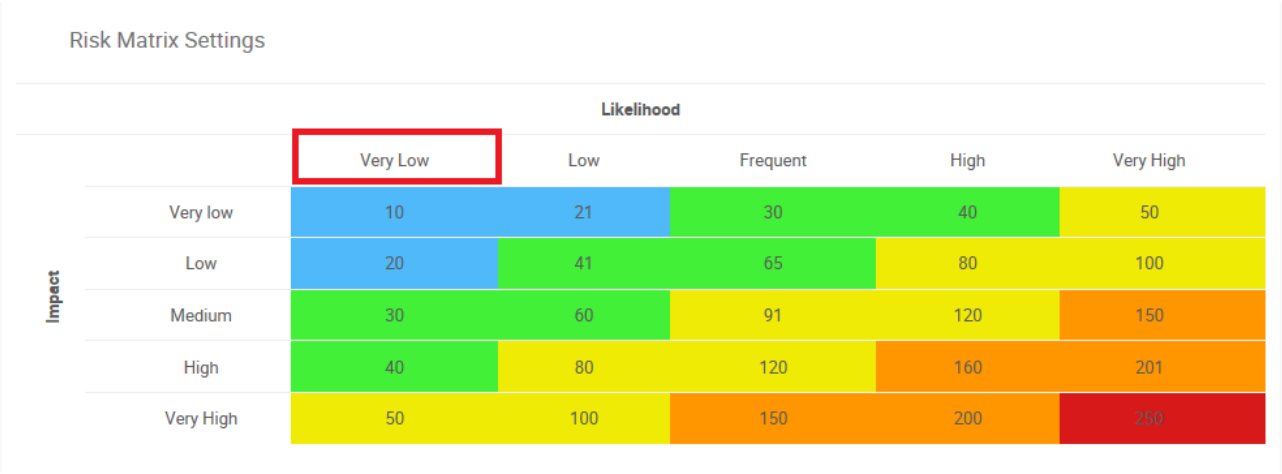
2. Select the Risk tab under the System Admin section



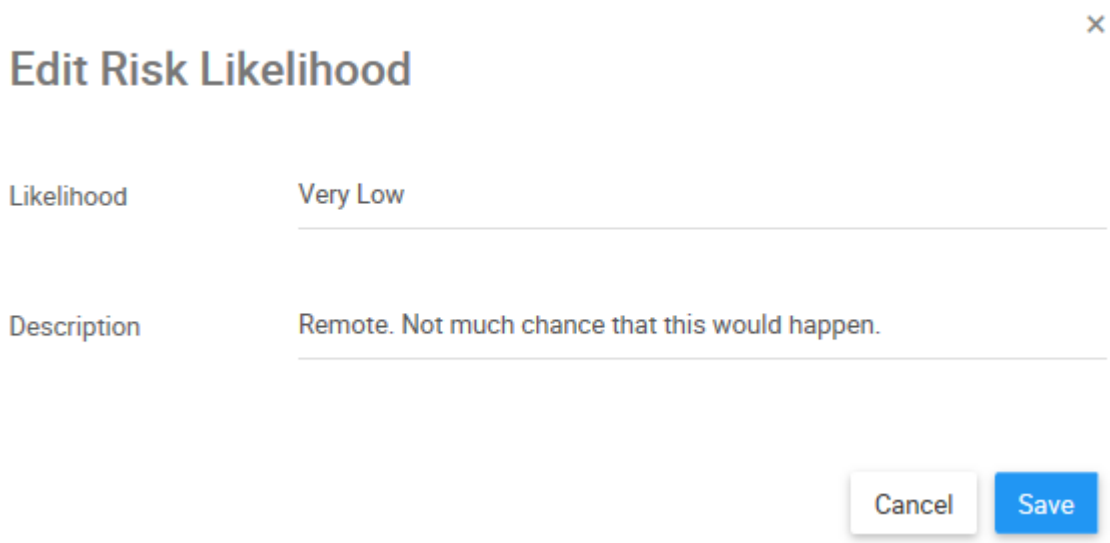
3. Navigate to the Risk Matrix Settings section



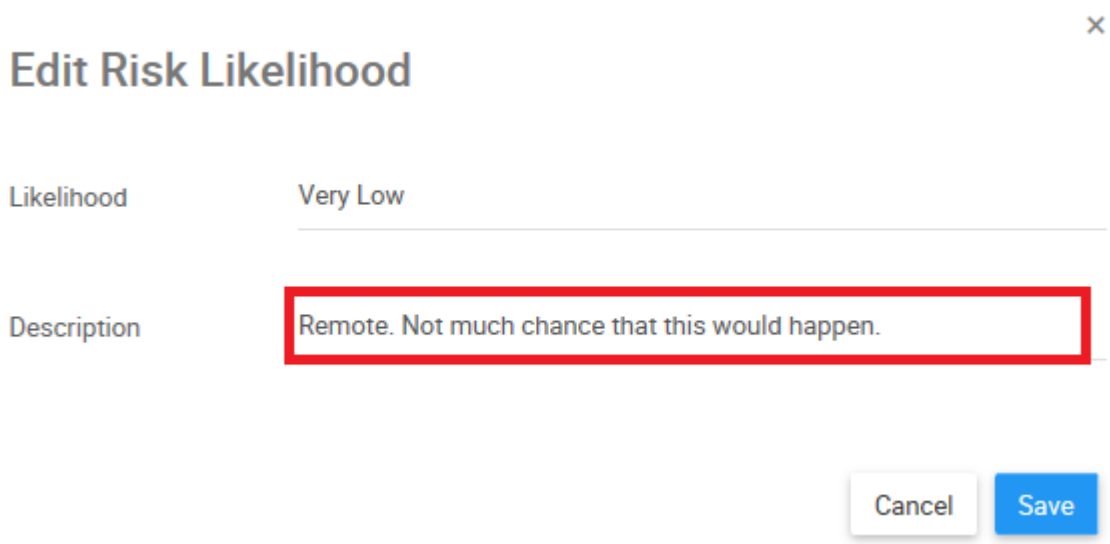
4. Select the Risk Likelihood you want to edit. For this example, the “Very Low” Likelihood is selected



5. This will create a pop-up window allowing System Admins to fill in the appropriate information concerning the Risk Likelihood



6. To edit the **Description** of the Risk Likelihood, select the Description text box



7. For this example, type the edited description “Low probability this would happen”

8. Select the Save button to confirm changes

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

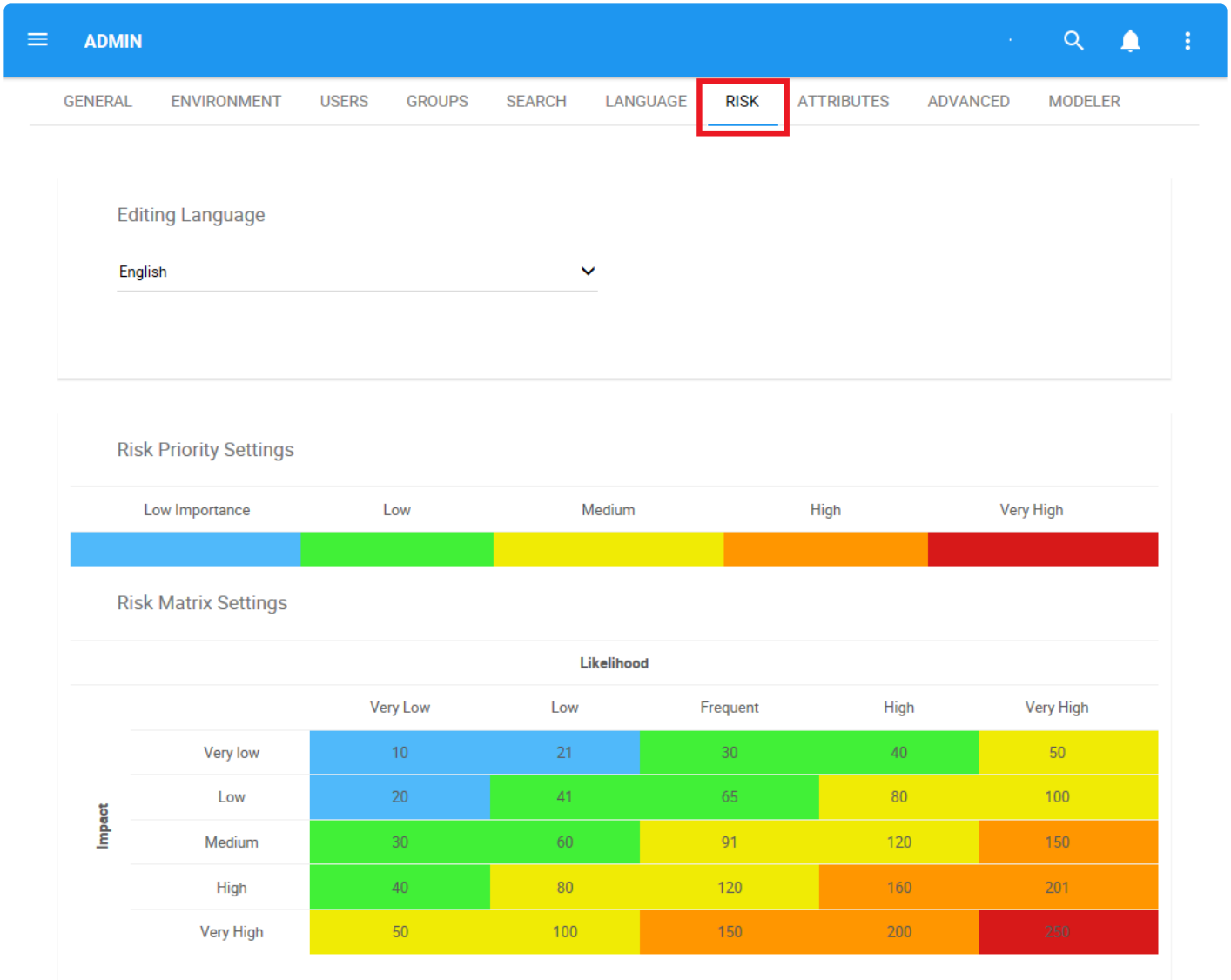
10.7.3.1.2.1 Edit Risk Impact Name

A Name is given by the System Admin to each Risk Impact to label them.

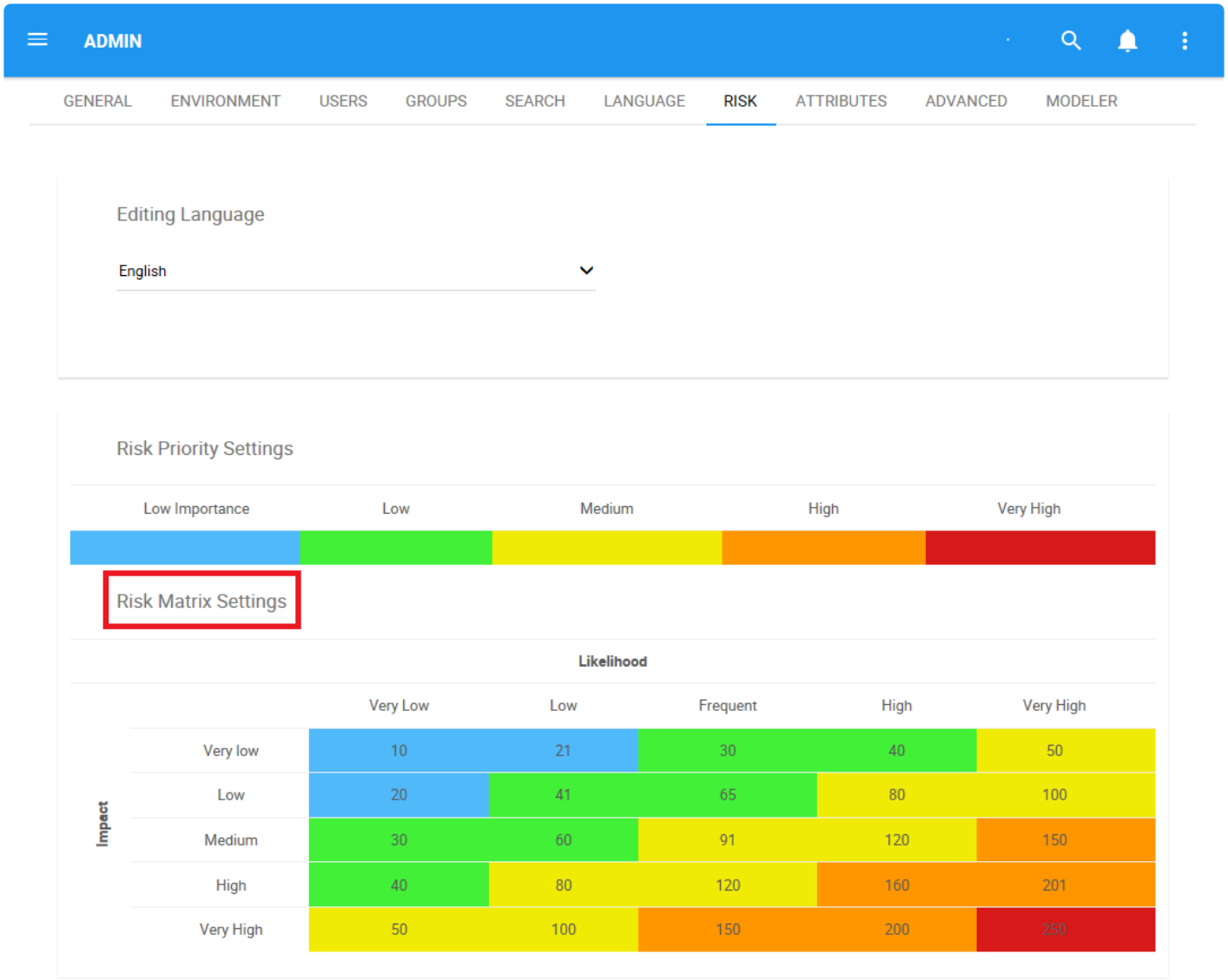
To Edit the Risk Impact Name, please follow the next steps

1. Navigate to the System Admin Section

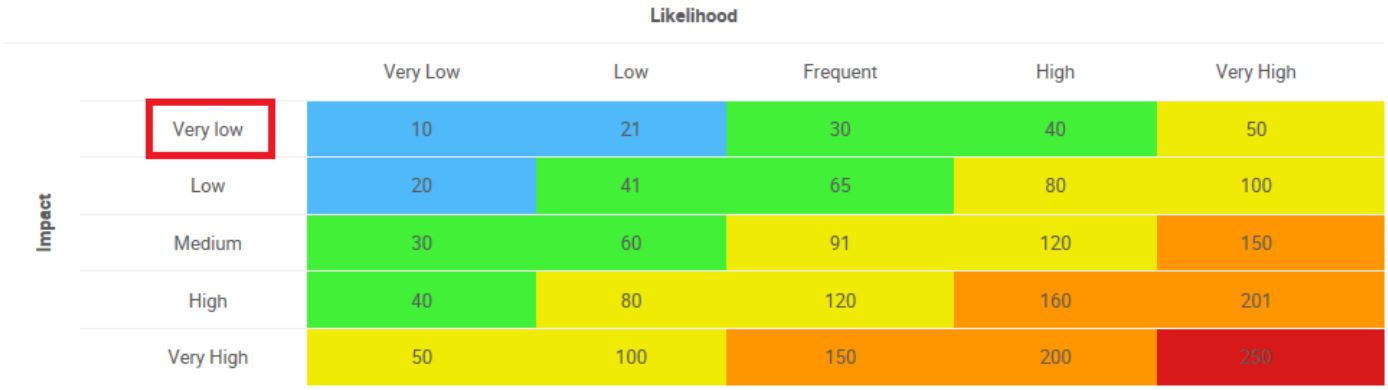
2. Select the Risk tab under the System Admin section



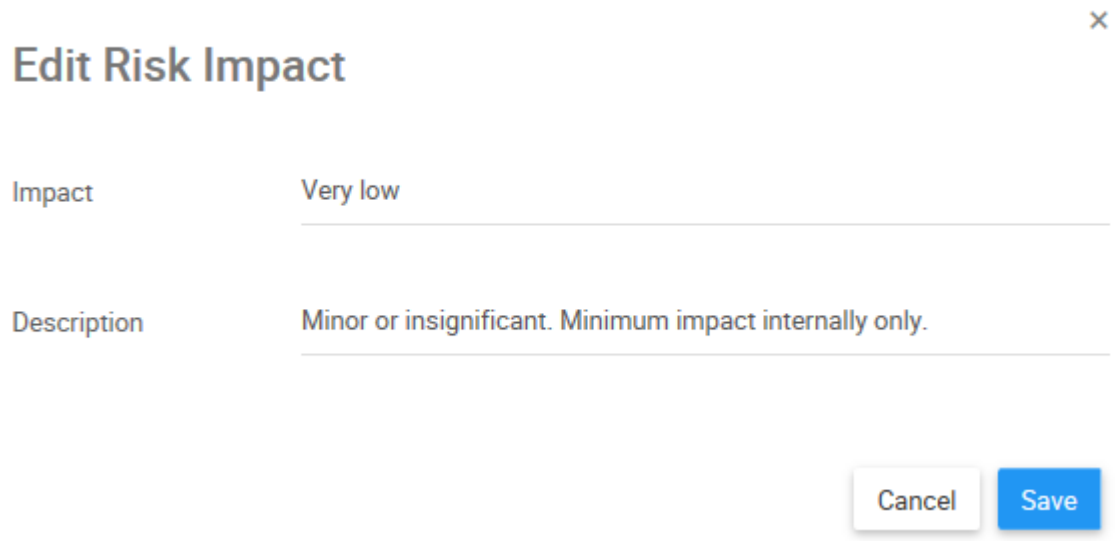
3. Navigate to the Risk Matrix Settings section



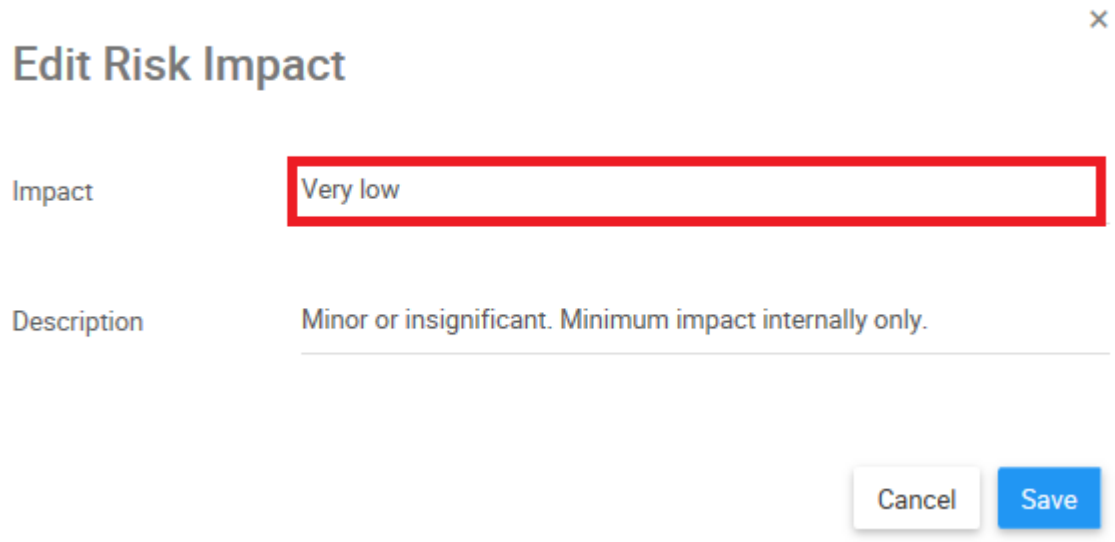
4. Select the Risk Impact you want to edit. For this example, the “Very Low” Impact is selected



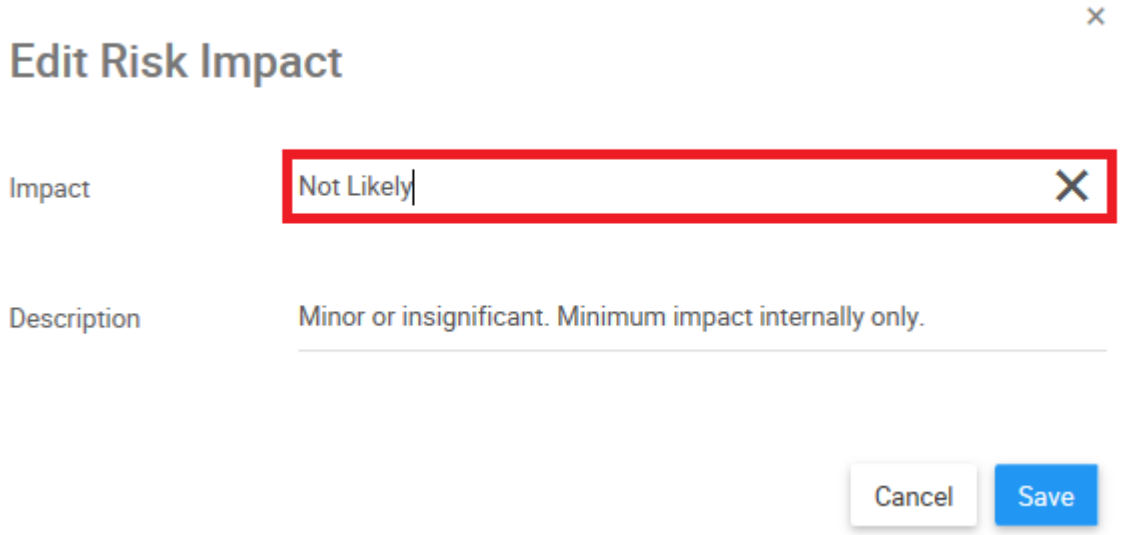
5. This will create a pop-up window allowing System Admins to fill in the appropriate information concerning the Risk Impact



6. To edit the **Name** of the Risk Impact, select the Impact text box



7. For this example, type the “Not Likely”



8. Select the Save button to confirm changes

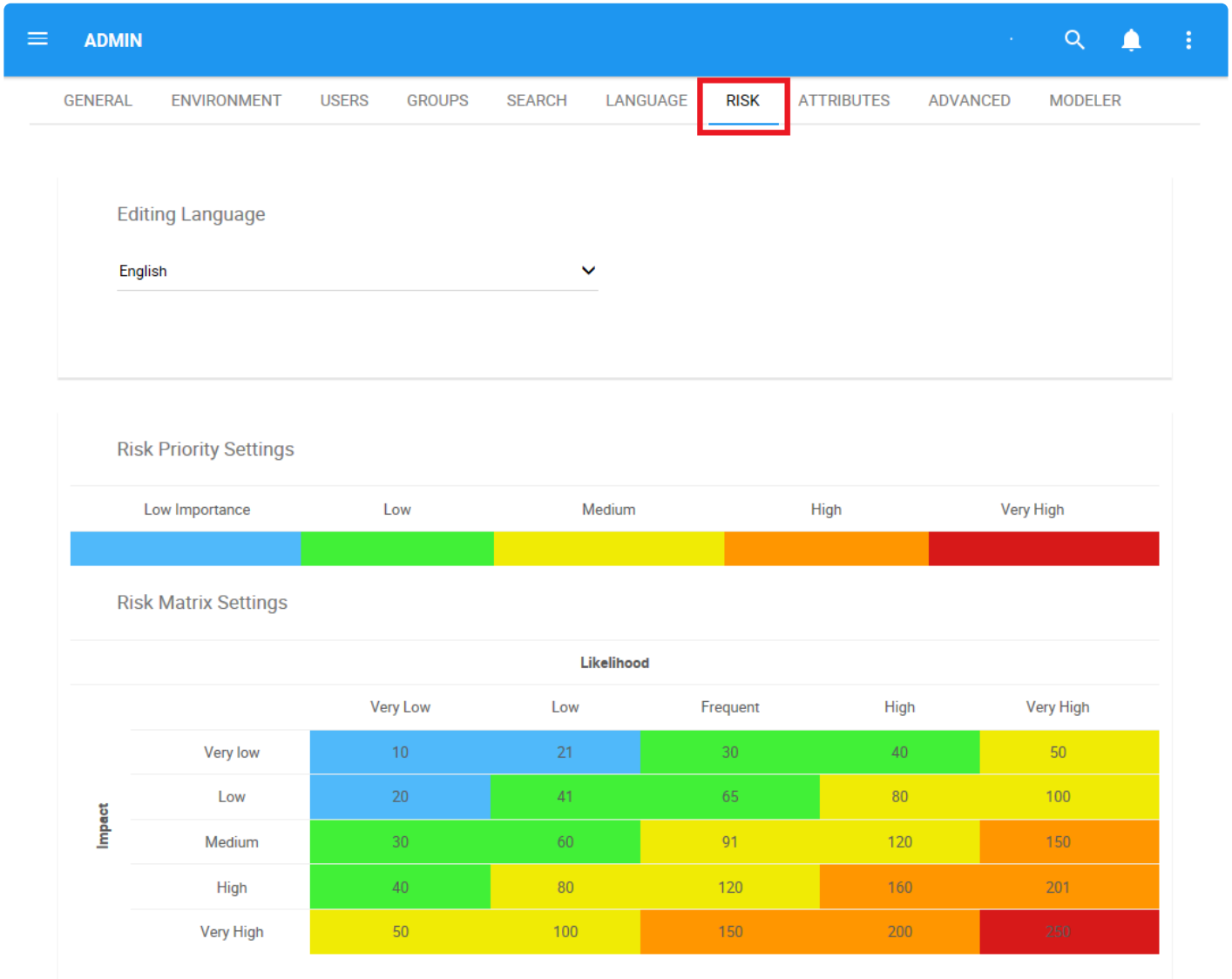
10.7.3.1.2.2 Edit Risk Impact Description

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.

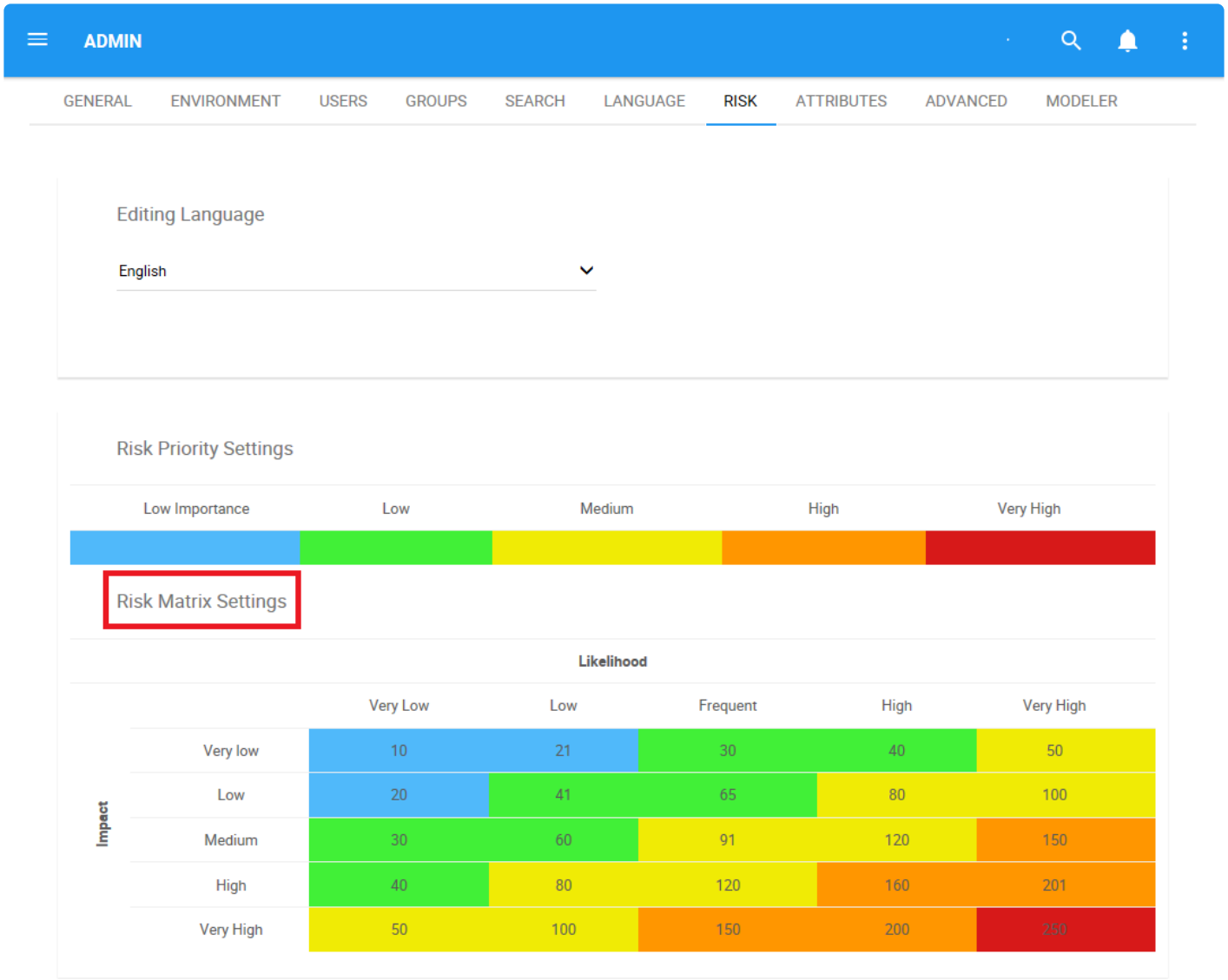
To Edit the Risk Impact Description, please follow the next steps

1. Navigate to the System Admin Section

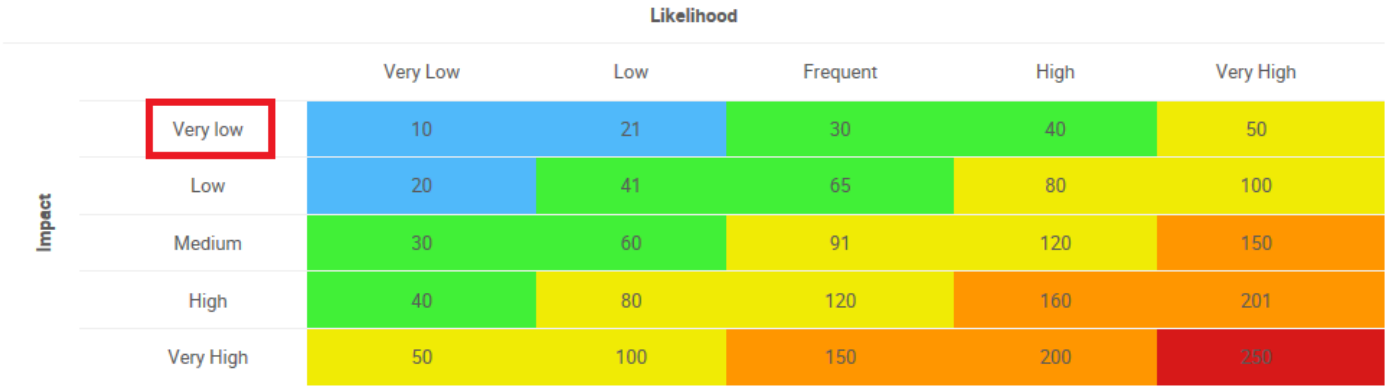
2. Select the Risk tab under the System Admin section



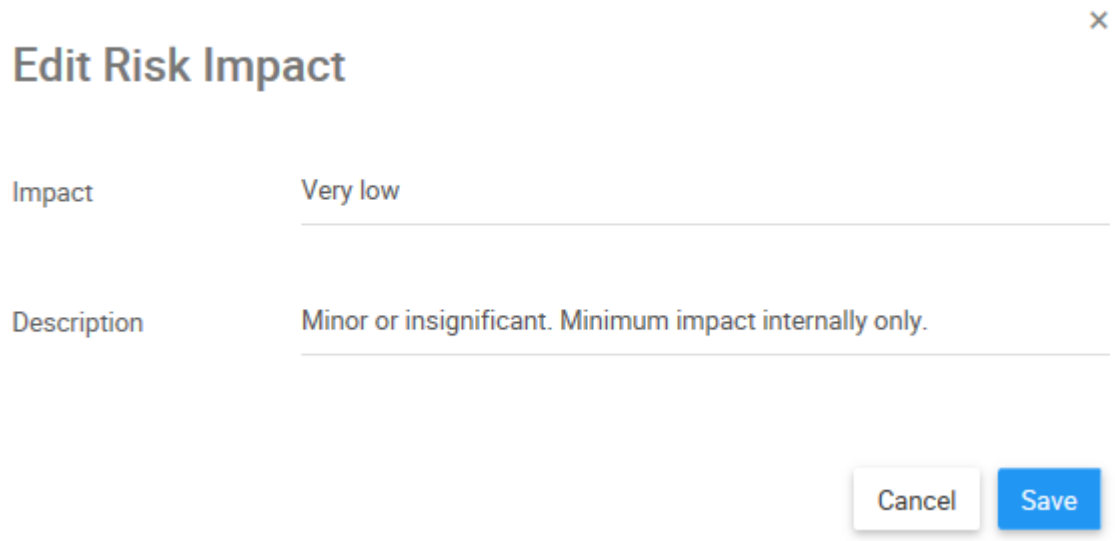
3. Navigate to the Risk Matrix Settings section



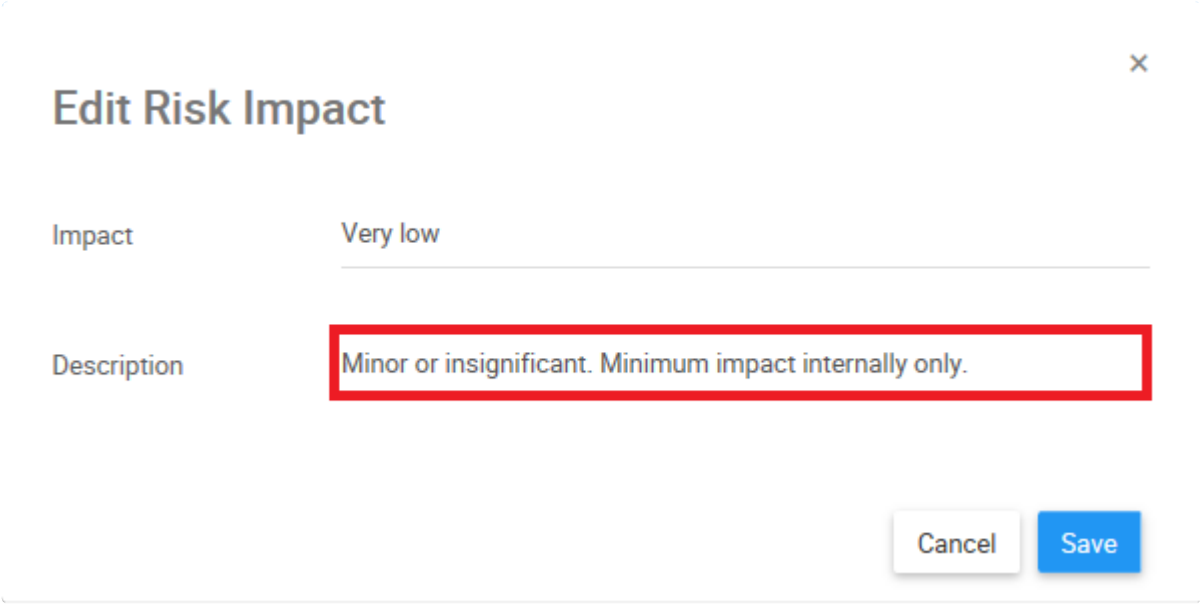
4. Select the Risk Impact you want to edit. For this example, the “Very Low” Impact is selected



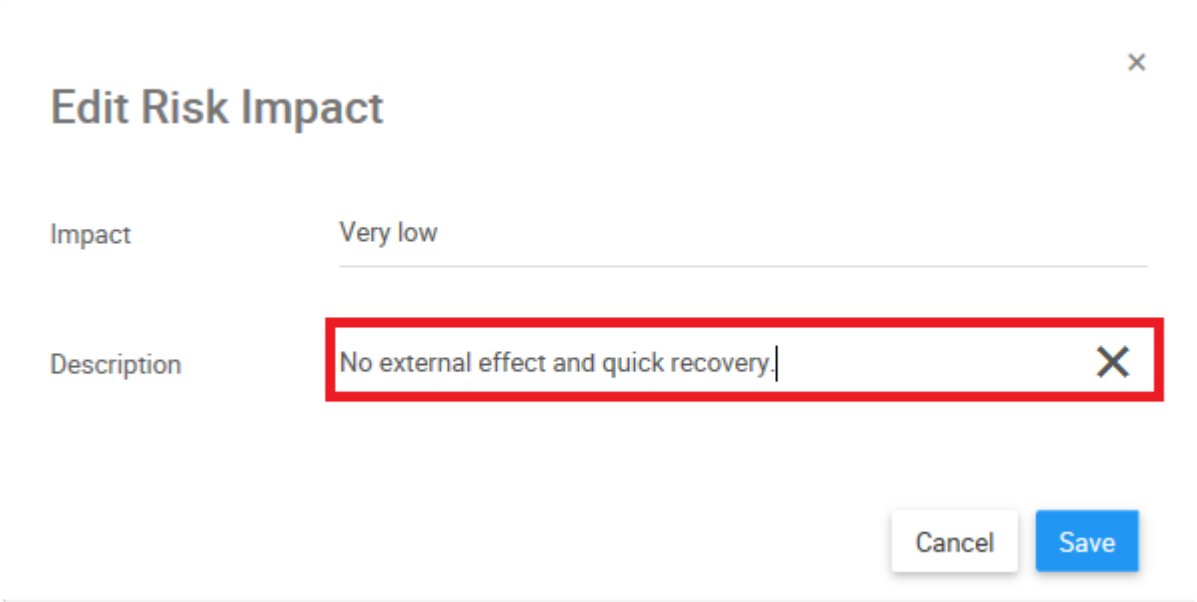
5. This will create a pop-up window allowing System Admins to fill in the appropriate information concerning the Risk Impact



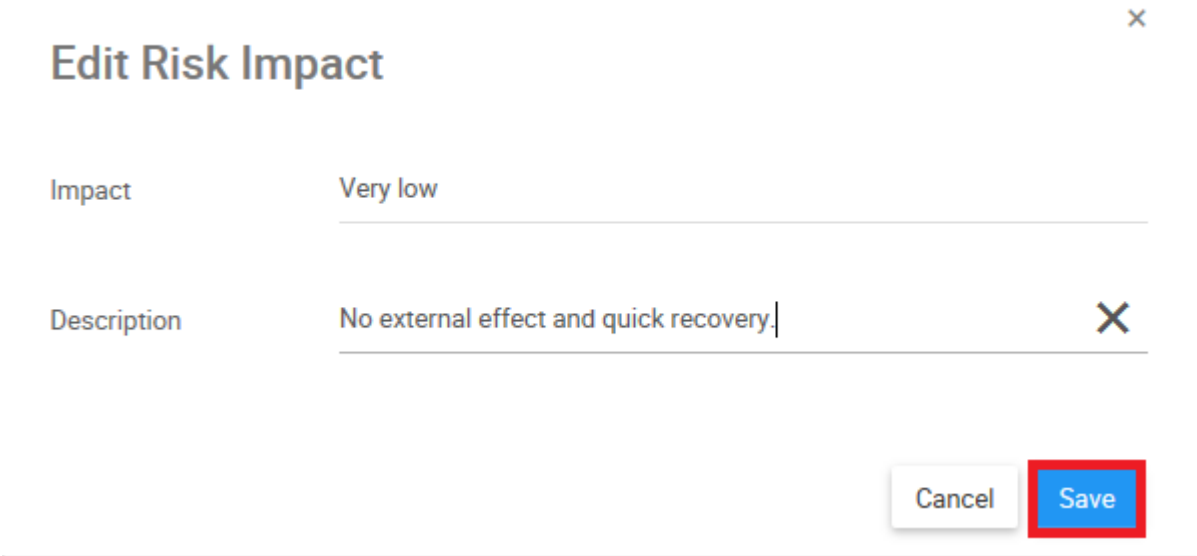
6. To edit the **Description** of the Risk Impact, select the Description text box



7. For this example, type the edited description “No external affect and quick recovery”



8. Select the Save button to confirm changes



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

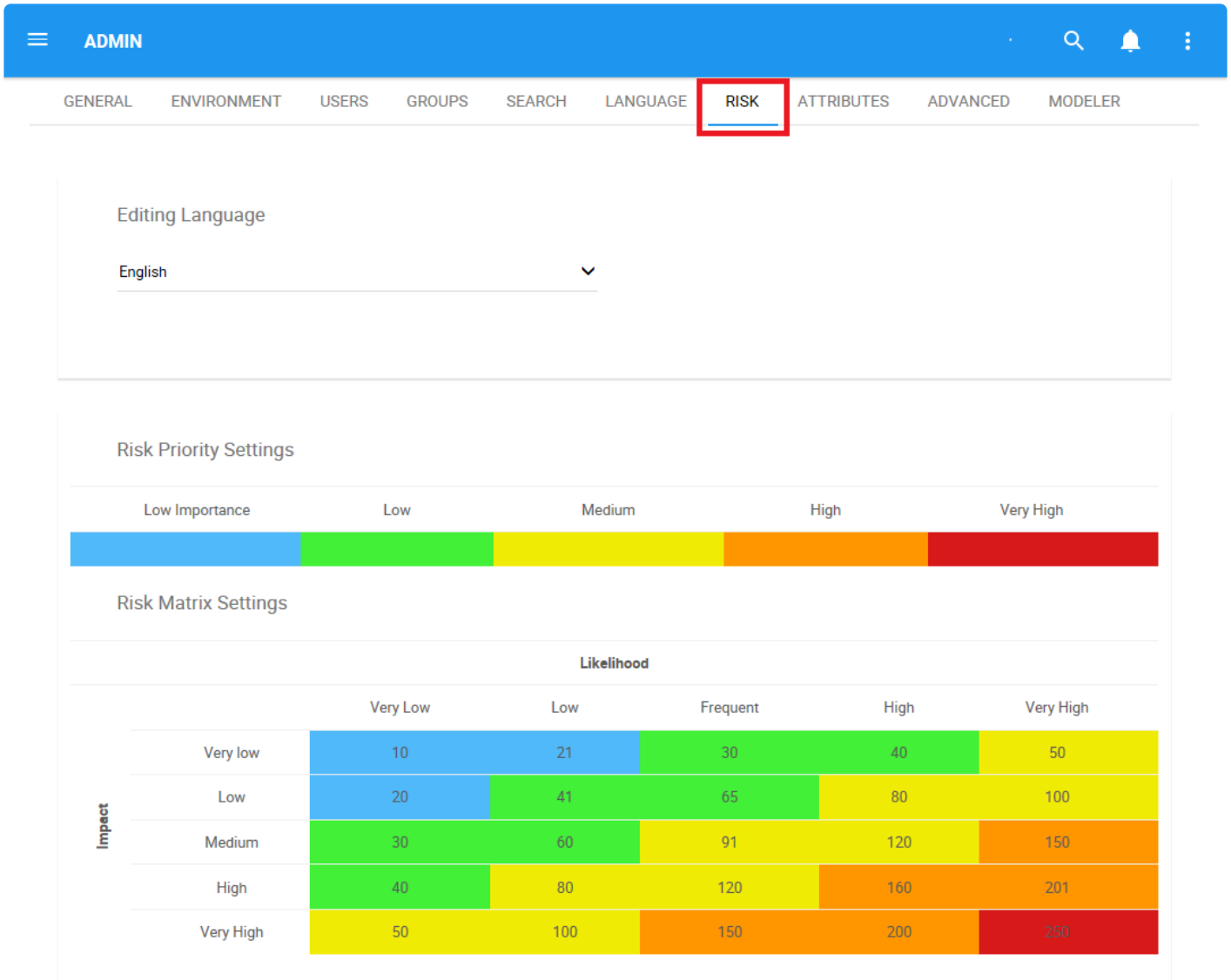
10.7.3.1.3.1 Edit Risk Profile Priority

System Administrators are responsible to set the Priority for the Risk Profile on the Risk Matrix.

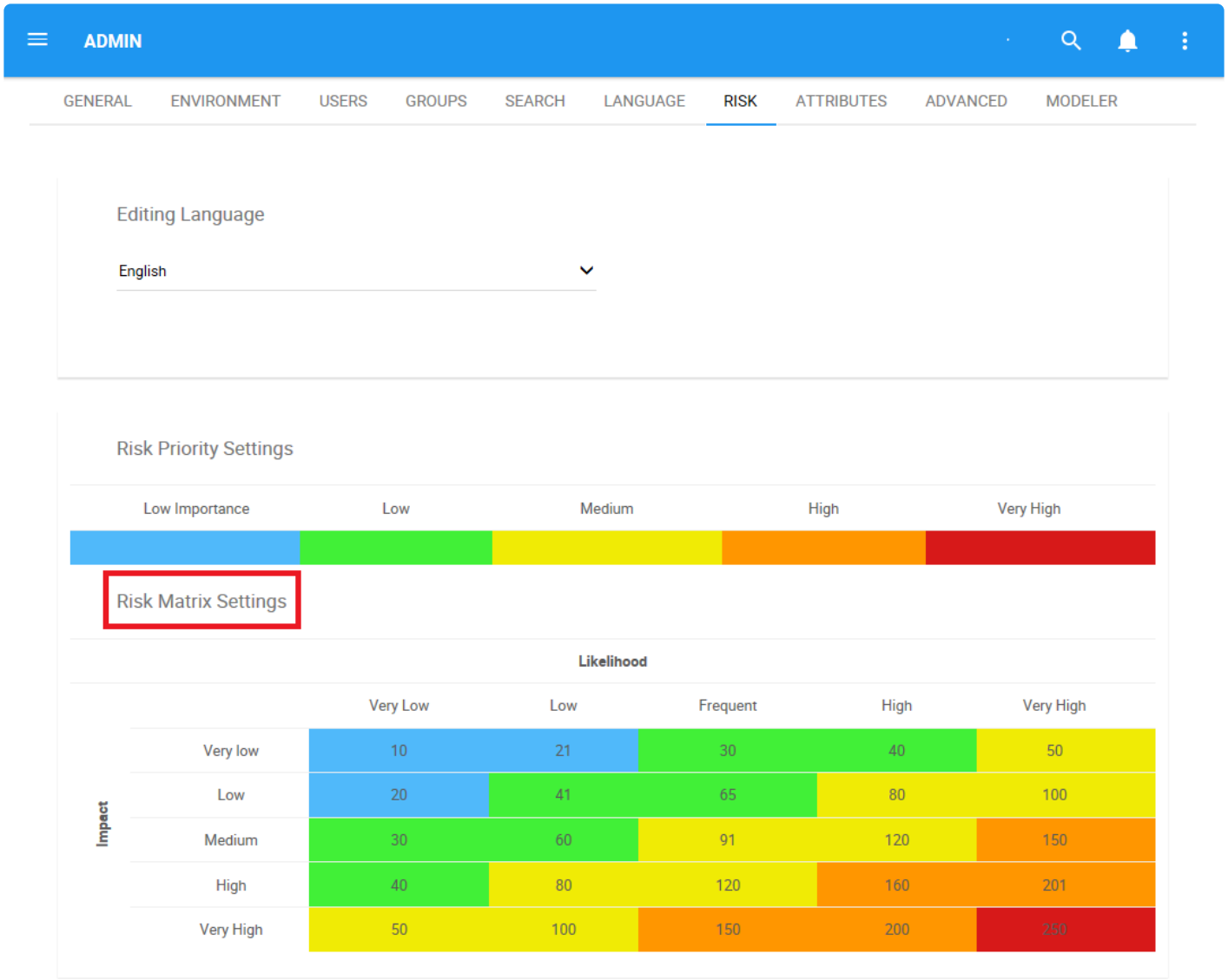
To Edit the Risk Profile Priority, please follow the next steps

1. Navigate to the System Admin Section

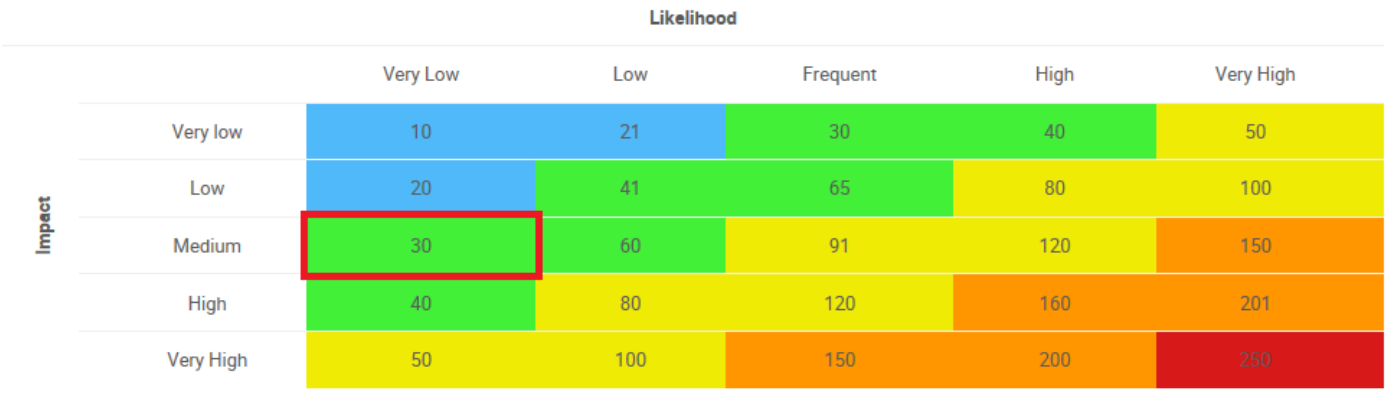
2. Select the Risk tab under the System Admin section



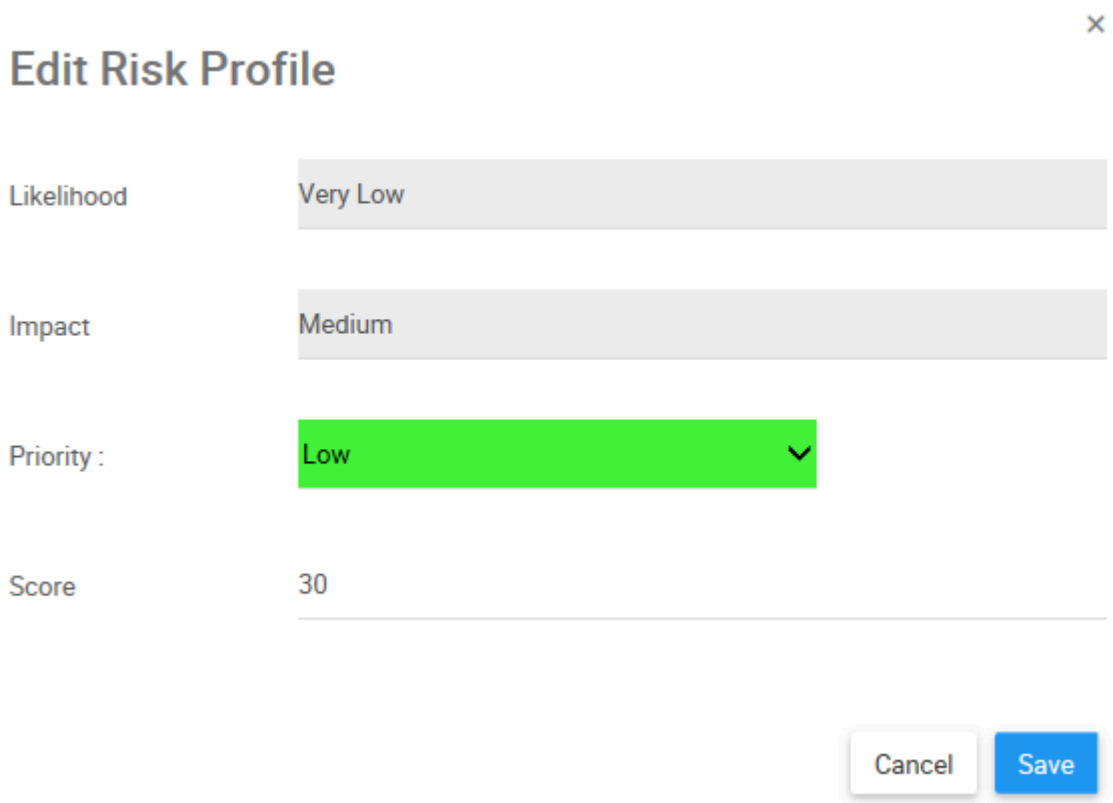
3. Navigate to the Risk Matrix Settings section



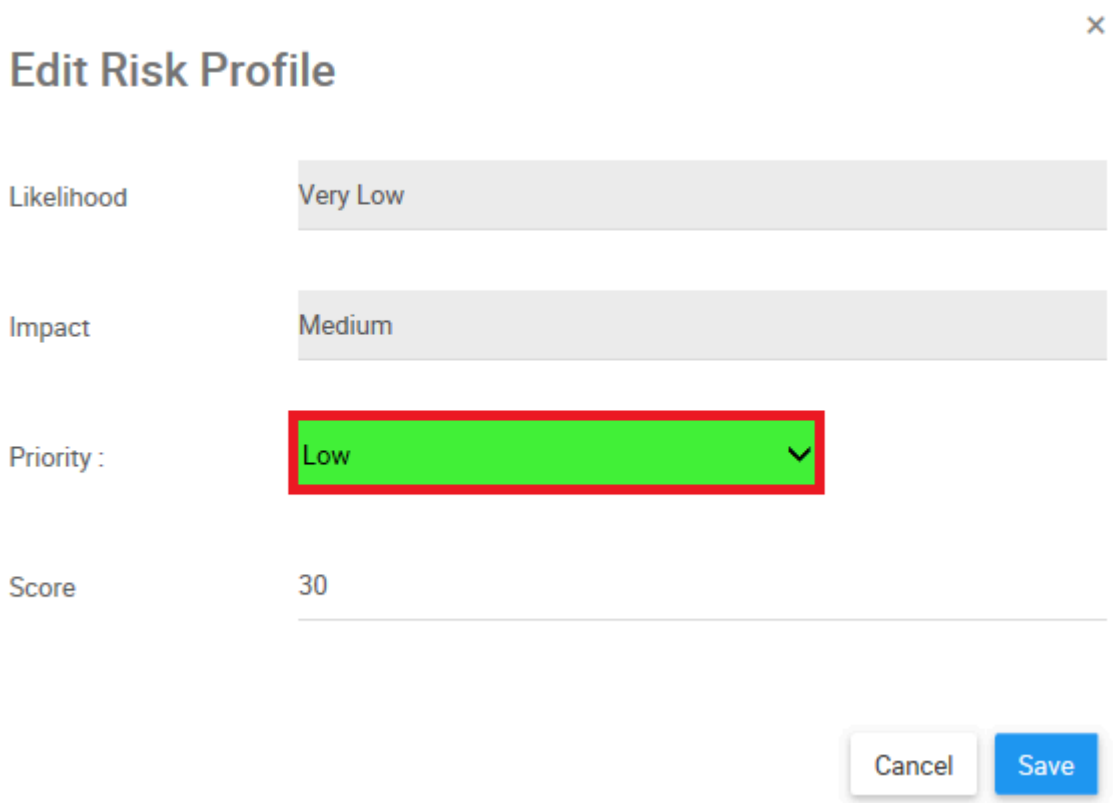
4. Select the Risk Profile you want to edit. For this example, the intersection between the Very Low Likelihood and the Medium with a “30” score is selected



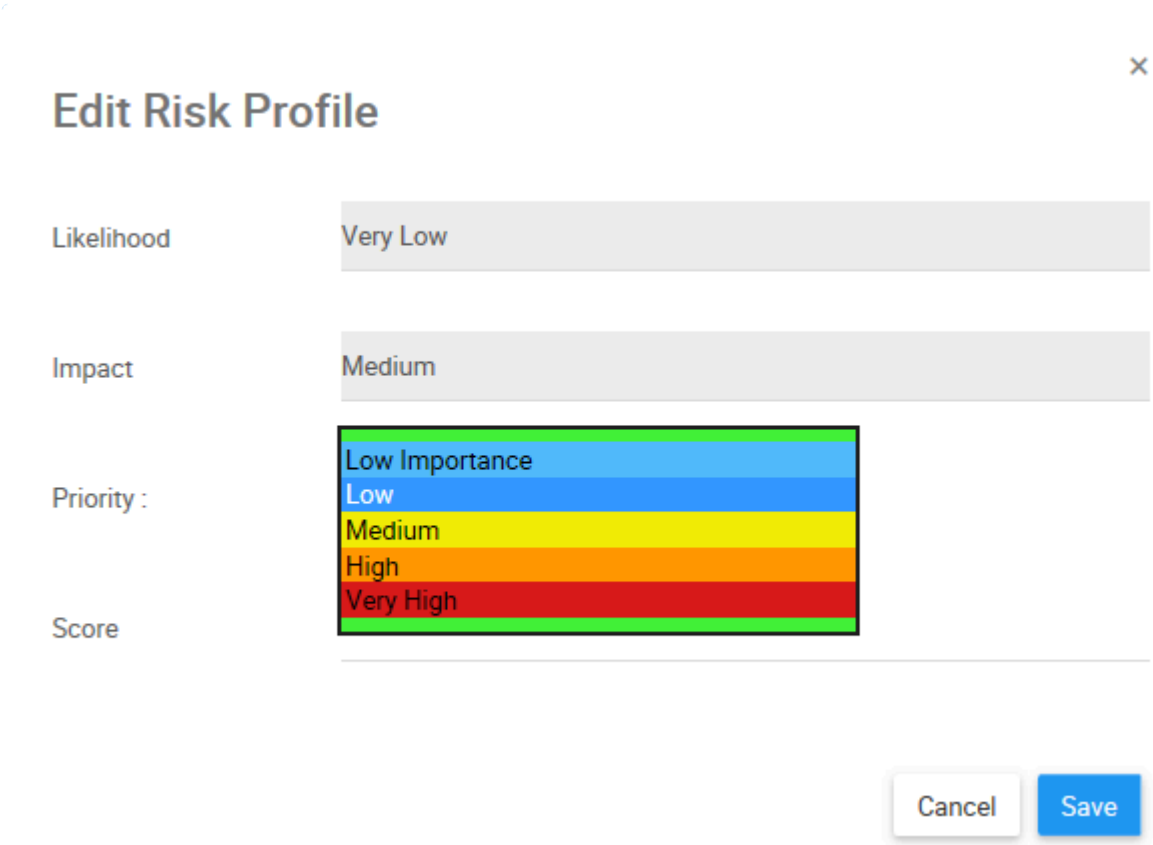
5. This will create a pop-up window allowing System Admins to fill in the appropriate information concerning the Risk Profile



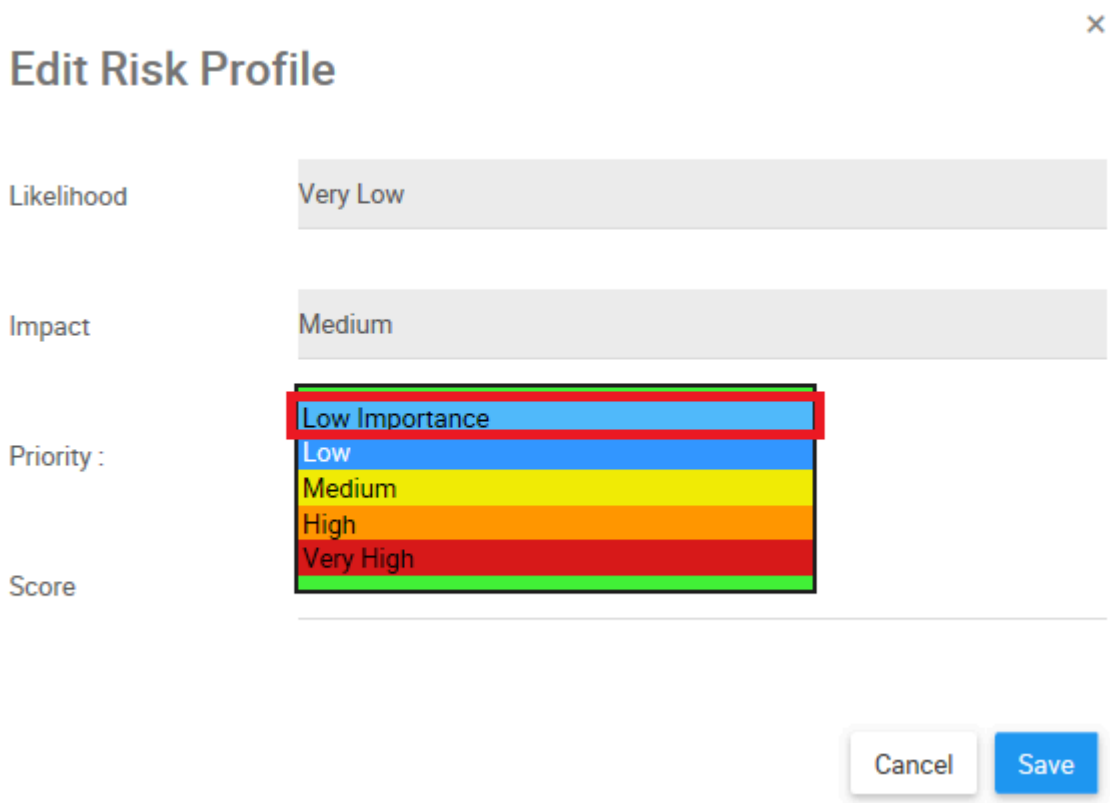
6. To edit the **Priority** of the Risk Profile, select the Priority box



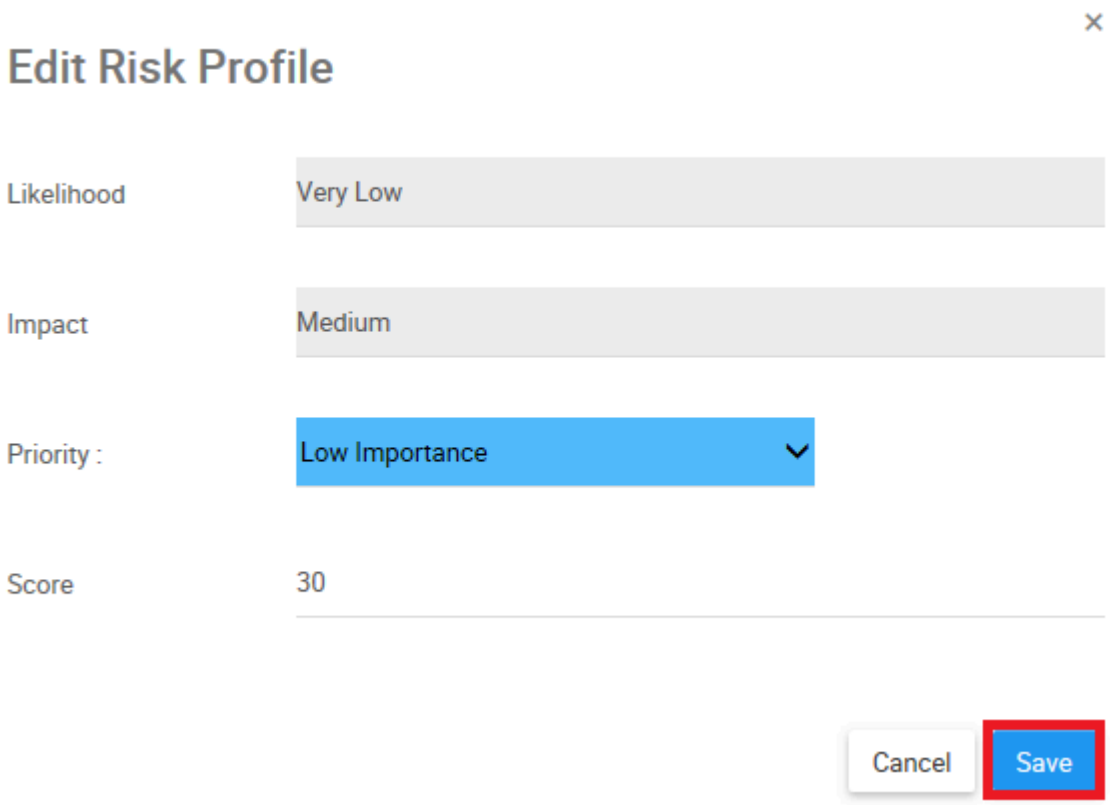
7. This will create a drop-down allowing System Admins to choose the priority name and color.



8. For this example, choose the “Low Importance” Priority



9. Select the Save button to confirm changes


Edit Risk Profile
Likelihood
Very Low
Impact
Medium
Priority :
Low Importance
Score
30
Cancel
Save

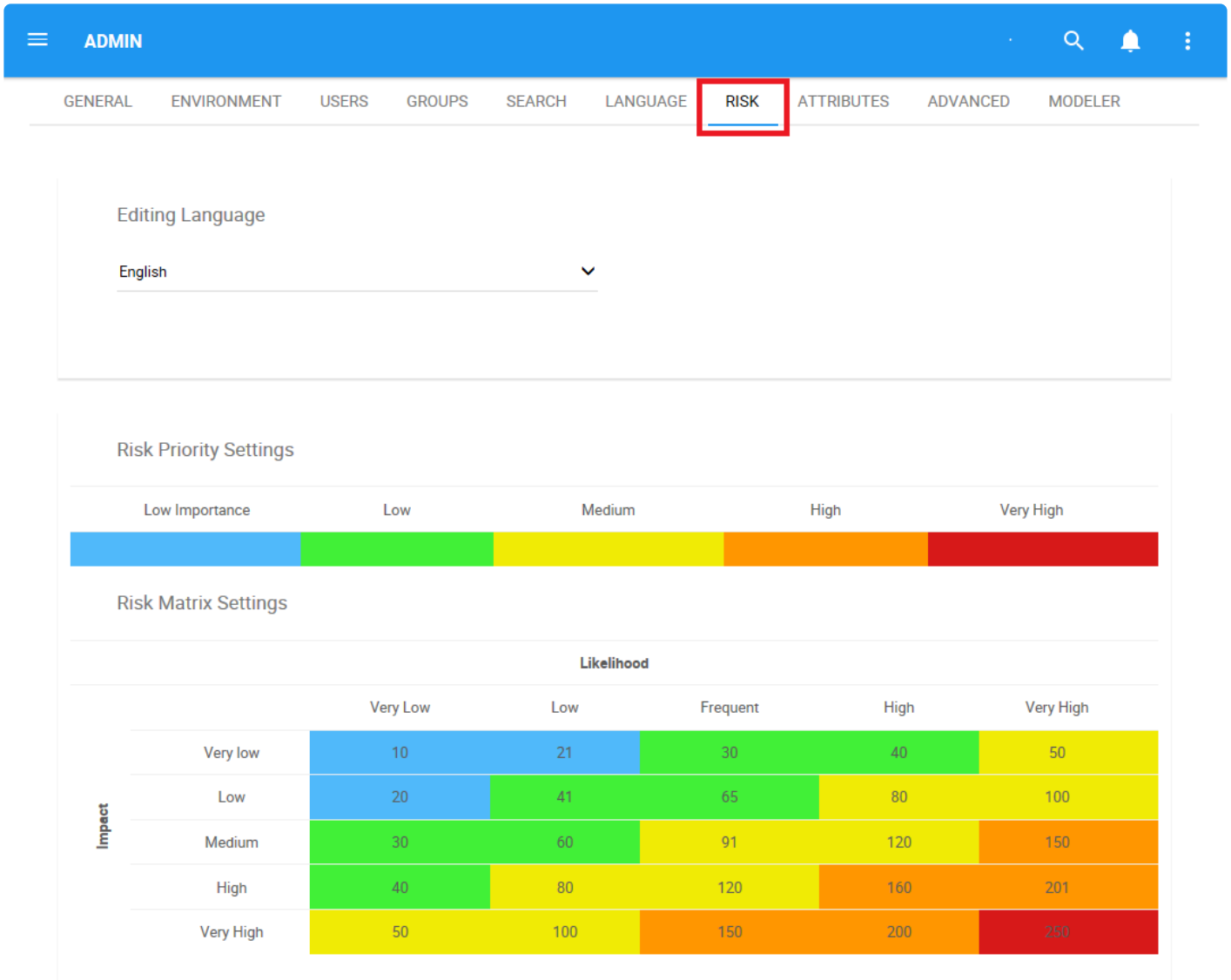
10.7.3.1.3.2 Edit Risk Profile Score

System Administrators are responsible to set the Score for the Risk Profile on the Risk Matrix.

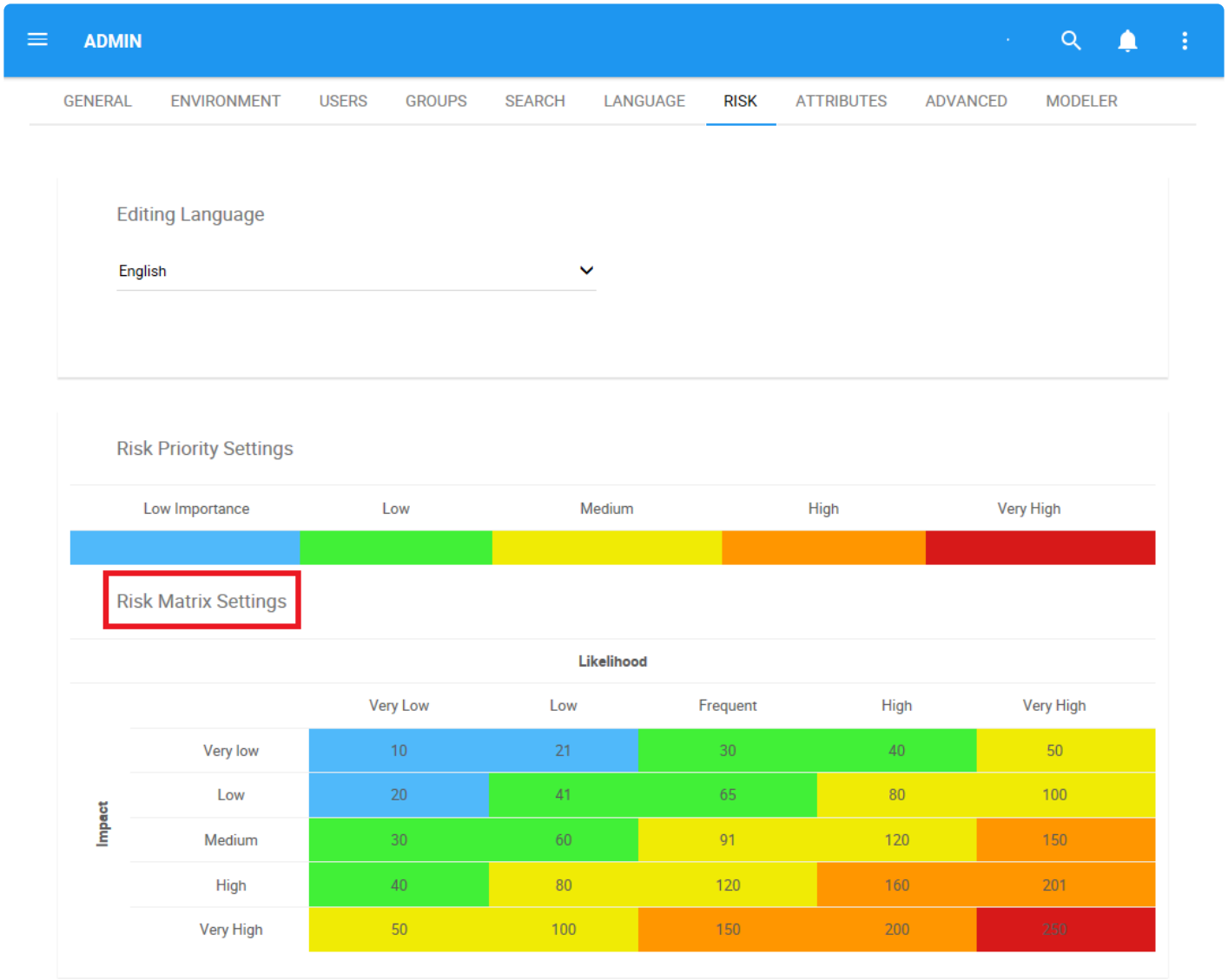
To Edit the Risk Profile Score, please follow the next steps

1. Navigate to the System Admin Section

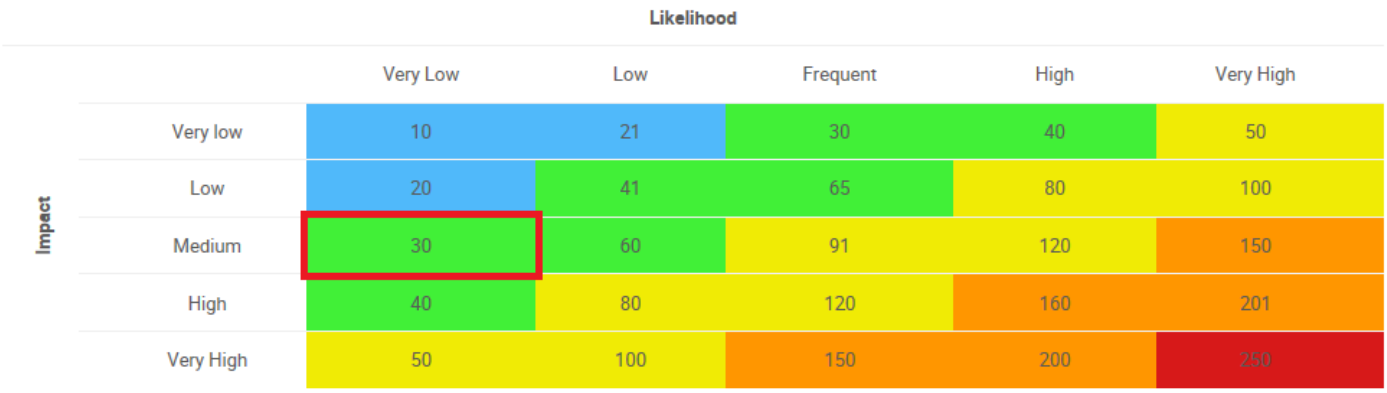
2. Select the Risk tab under the System Admin section



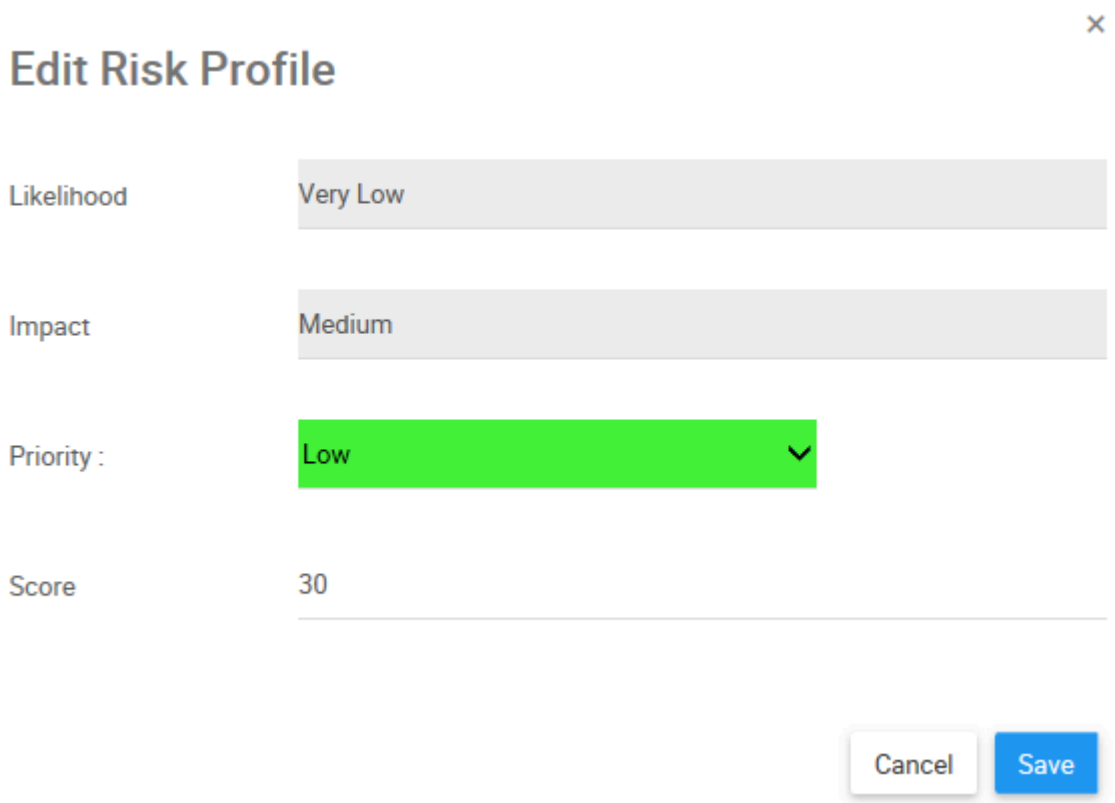
3. Navigate to the Risk Matrix Settings section



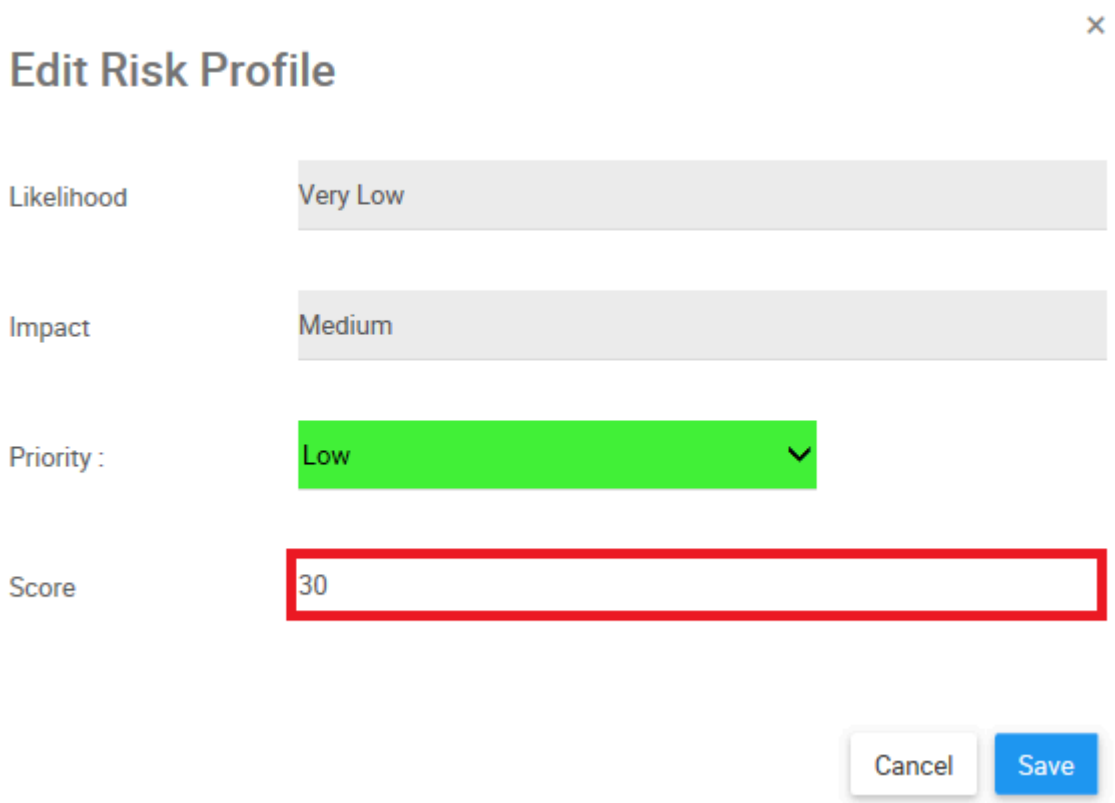
4. Select the Risk Profile you want to edit. For this example, the intersection between the Very Low Likelihood and the Medium with a “30” score is selected



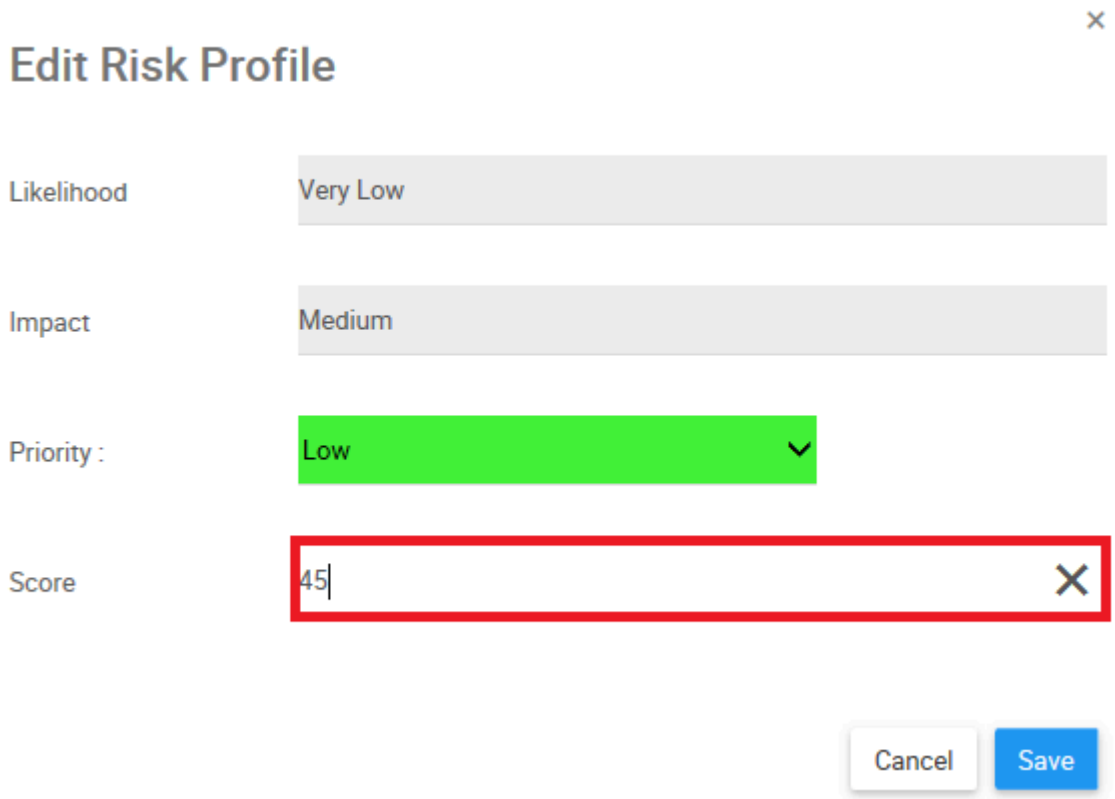
5. This will create a pop-up window allowing System Admins to fill in the appropriate information concerning the Risk Profile



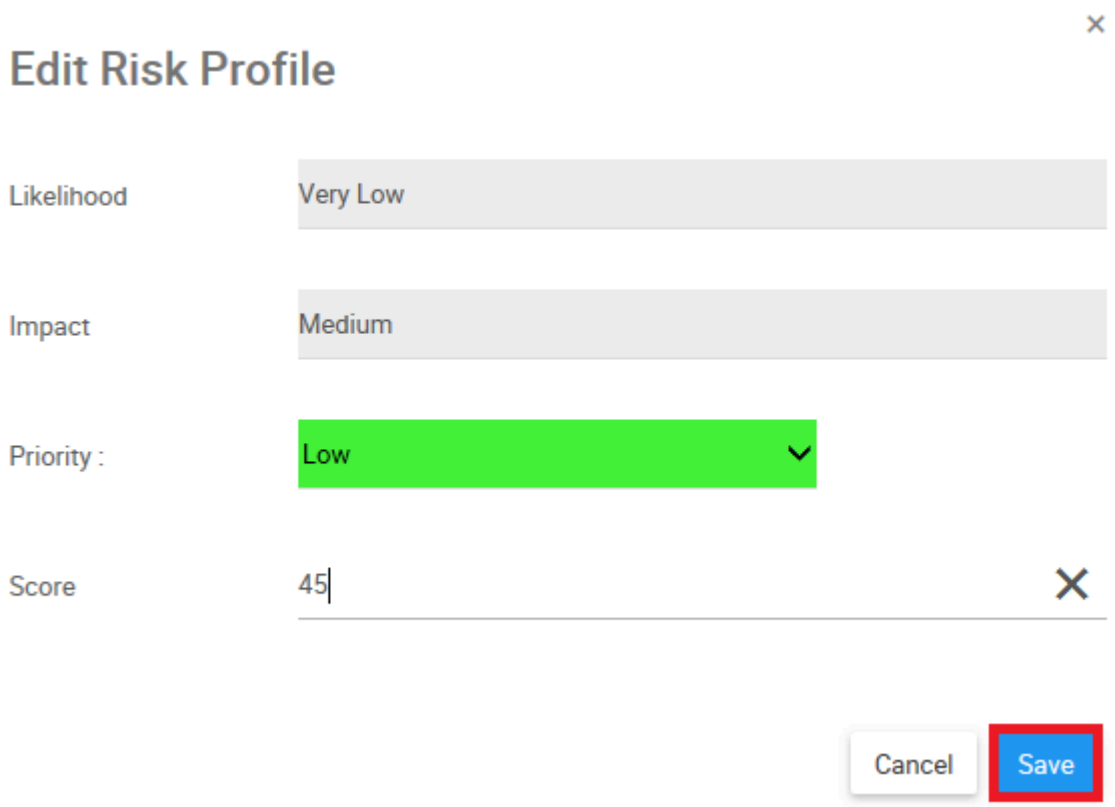
6. To edit the **Score** of the Risk Profile, select the Score text box



7. For this example, type “45” as tue score for the Risk Profile



8. Select the Save button to confirm changes


Edit Risk Profile
Likelihood
Very Low
Impact
Medium
Priority :
Low
Score
45
Cancel
Save

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

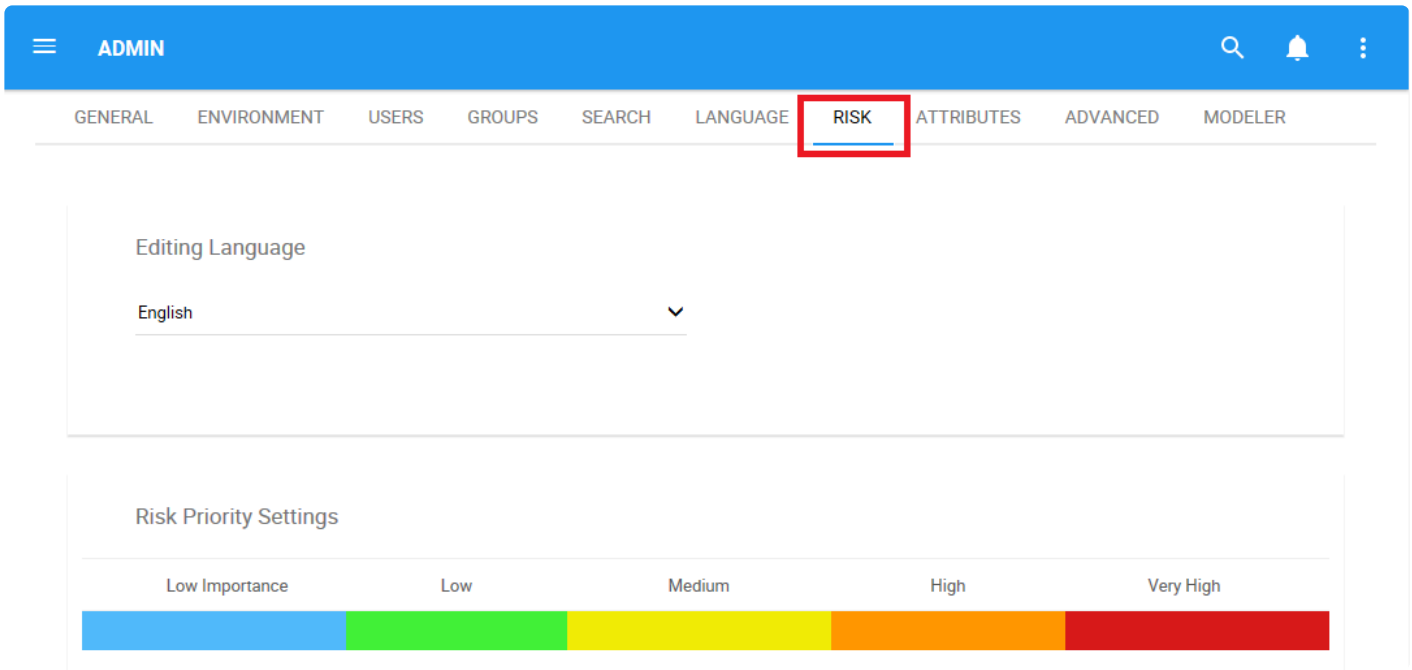
10.7.3.2.1 Edit Risk Likelihood Language

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

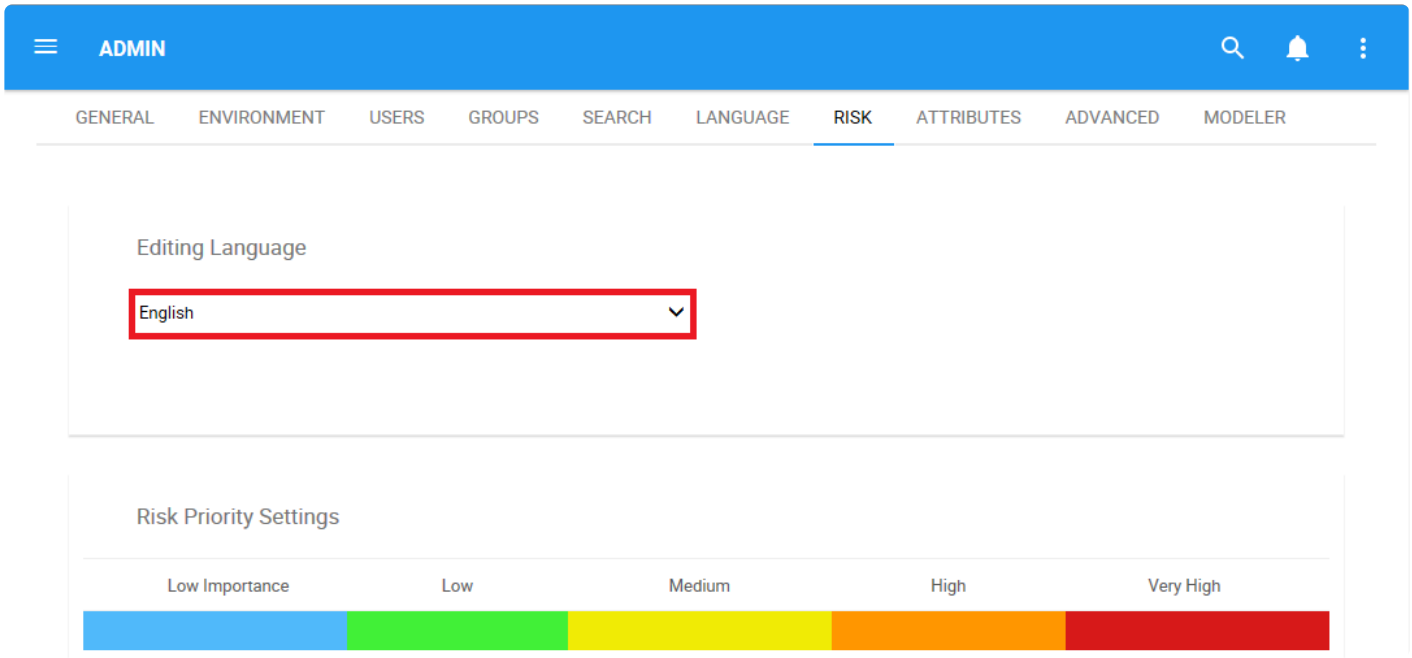
To Edit the Risk Likelihood in a different language, follow the next steps

1. Navigate to the System Admin Section

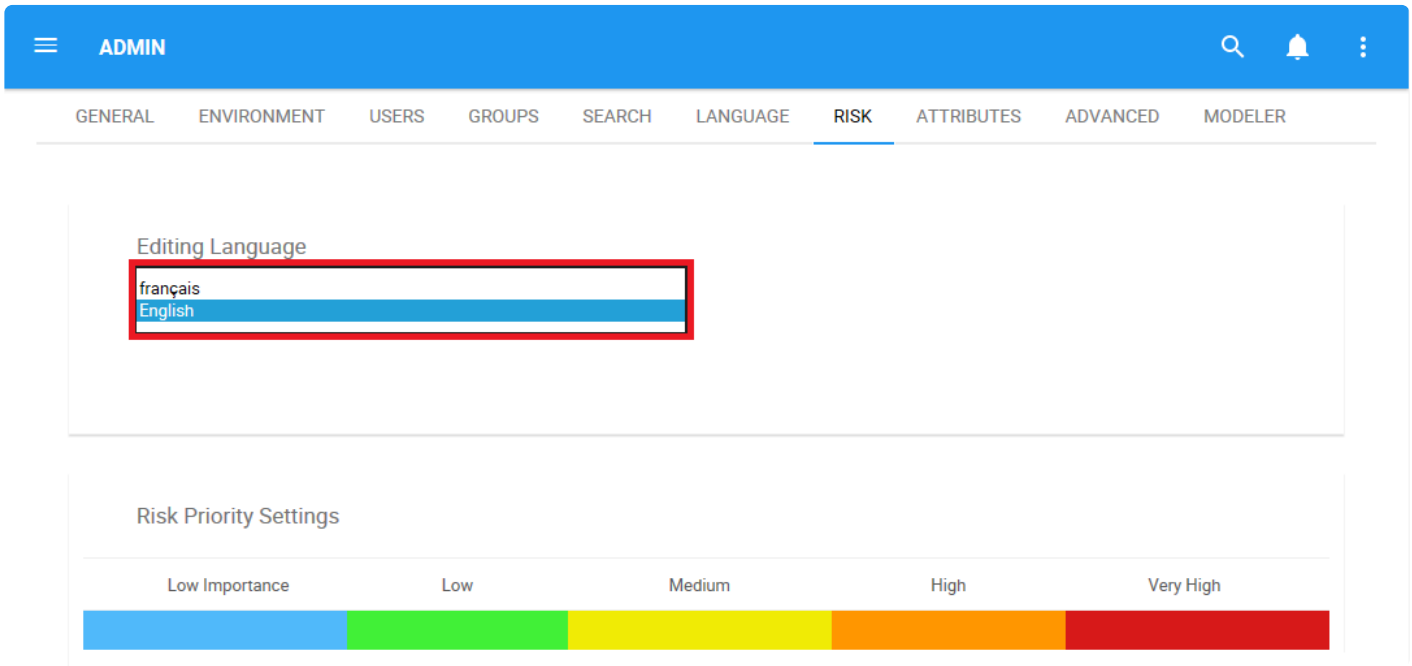
2. Select the Risk tab under the System Admin section



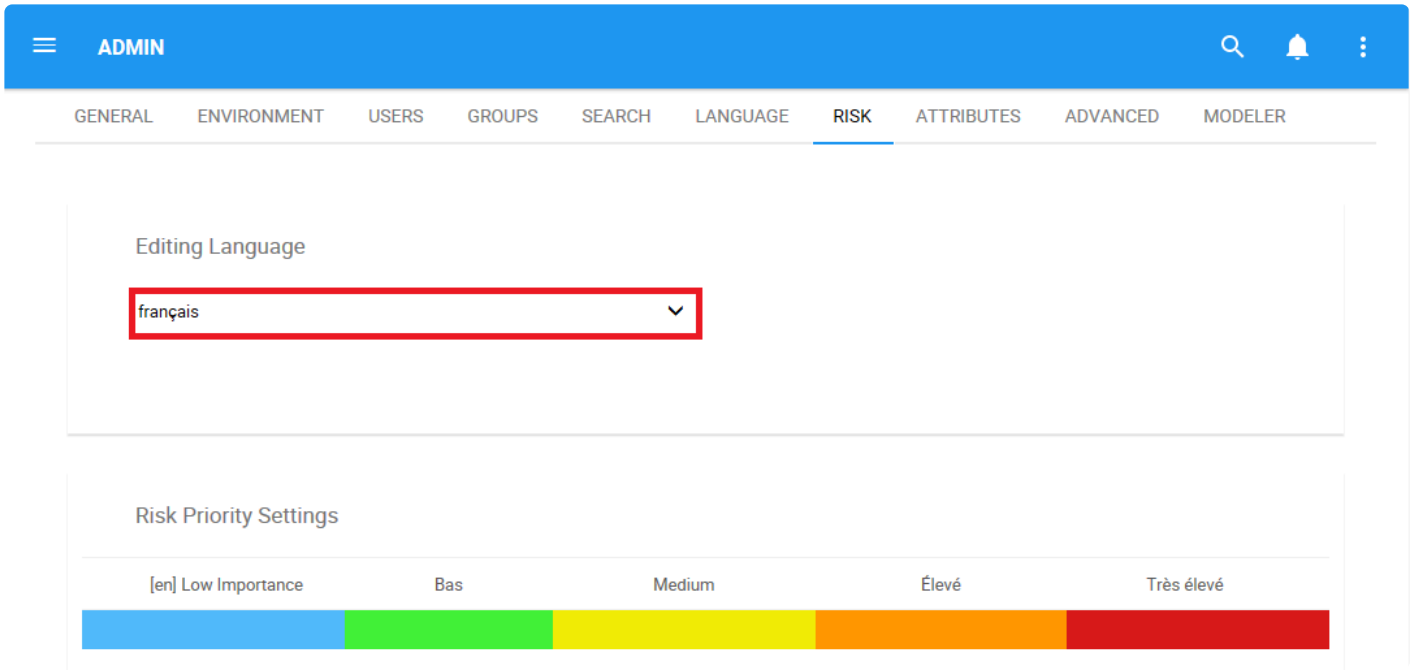
3. Navigate to the Editing Language section and select the “English” box



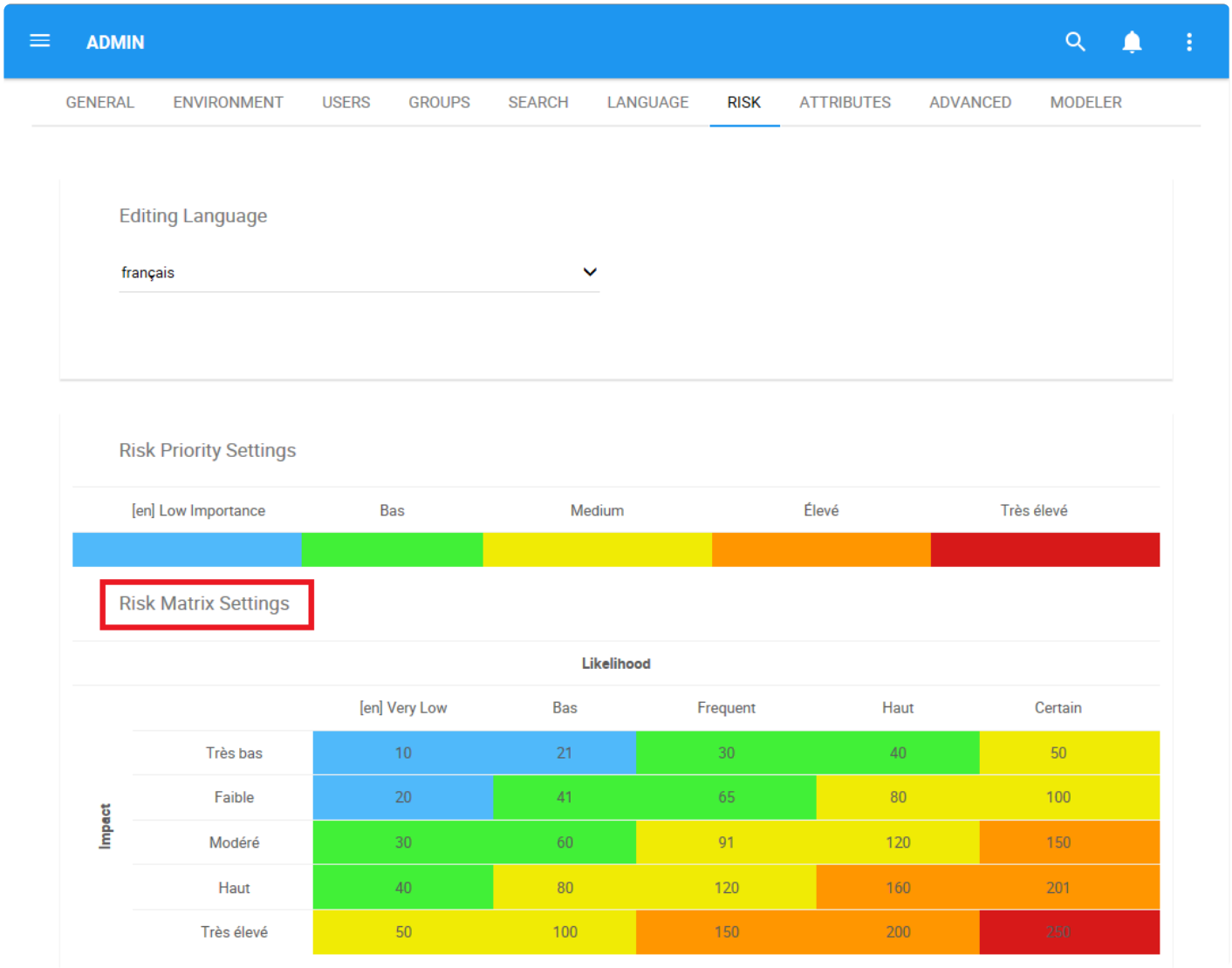
4. This will generate a drop-down menu featuring the languages you are allowed to use and create content for



5. Select the language you want to create Risk Likelihood content for. For this example, French is chosen.



6. Navigate to the Risk Matrix Settings section



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

Impact	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	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

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

9. Select the Save box to confirm changes

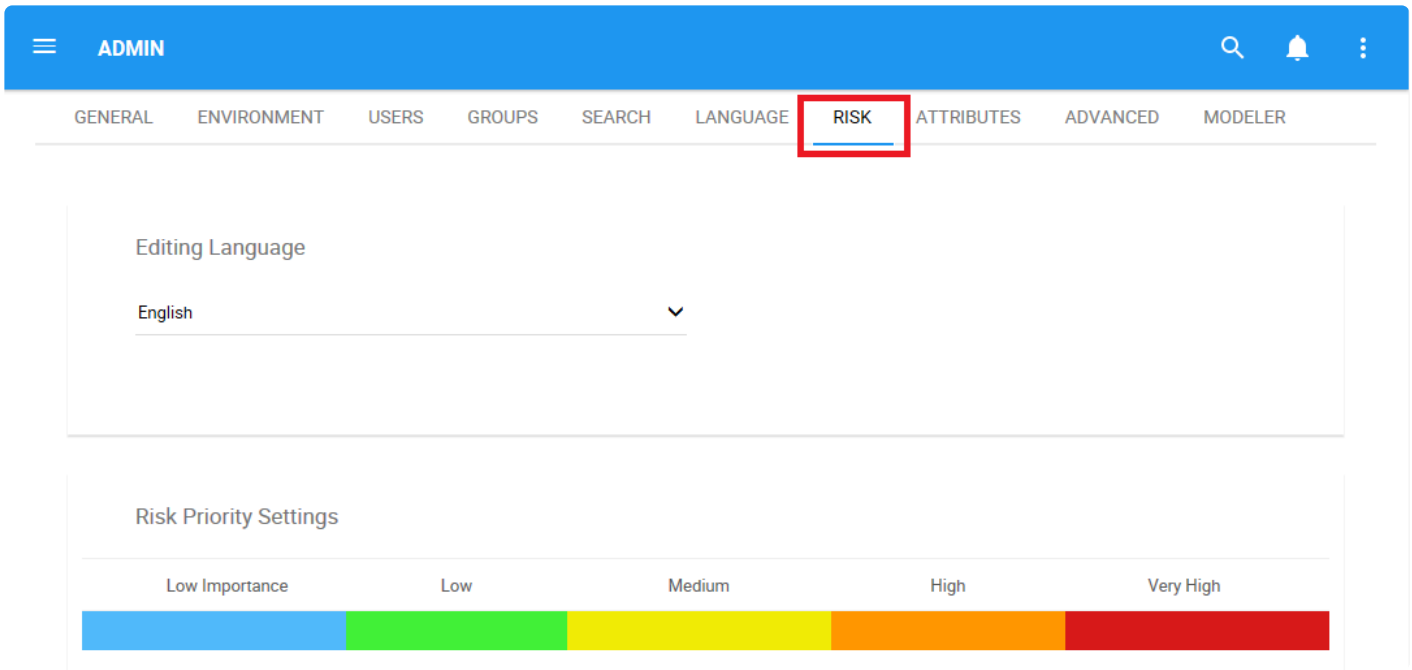
10.7.3.2.2 Edit Risk Impact Language

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

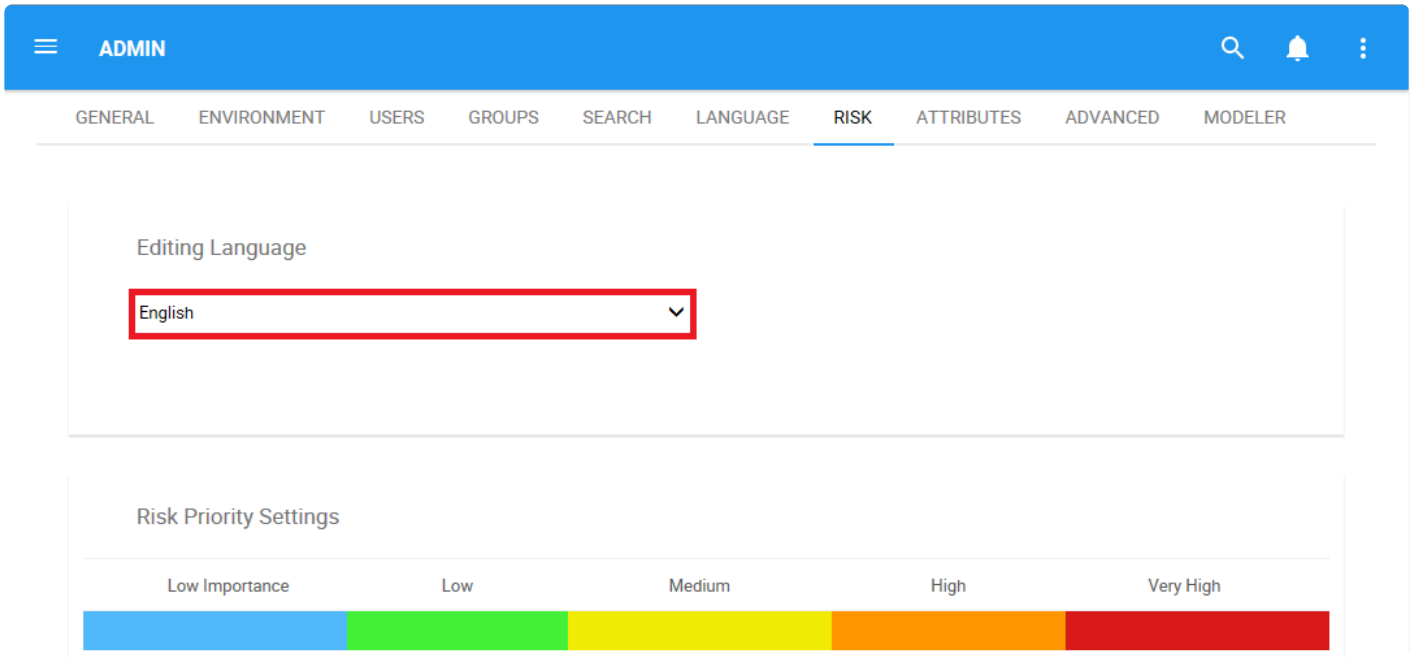
To Edit the Risk Impact in a different language, follow the next steps

1. Navigate to the System Admin Section

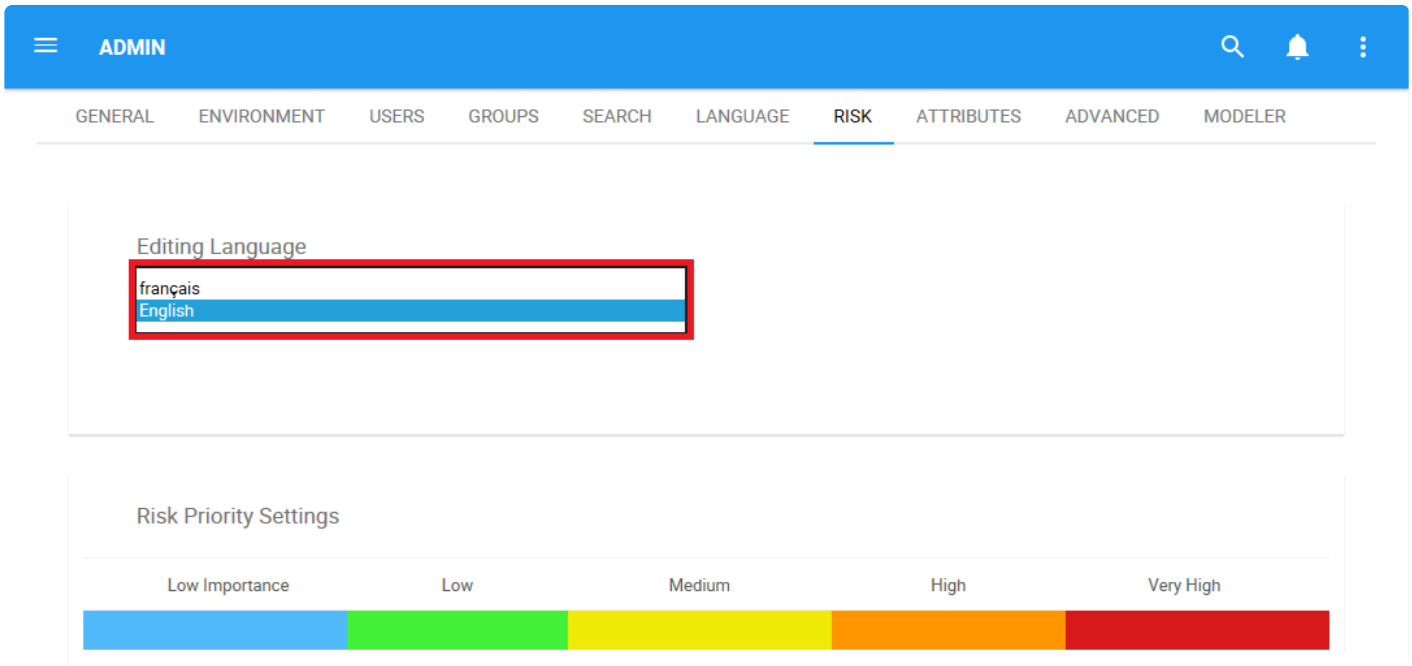
2. Select the Risk tab under the System Admin section



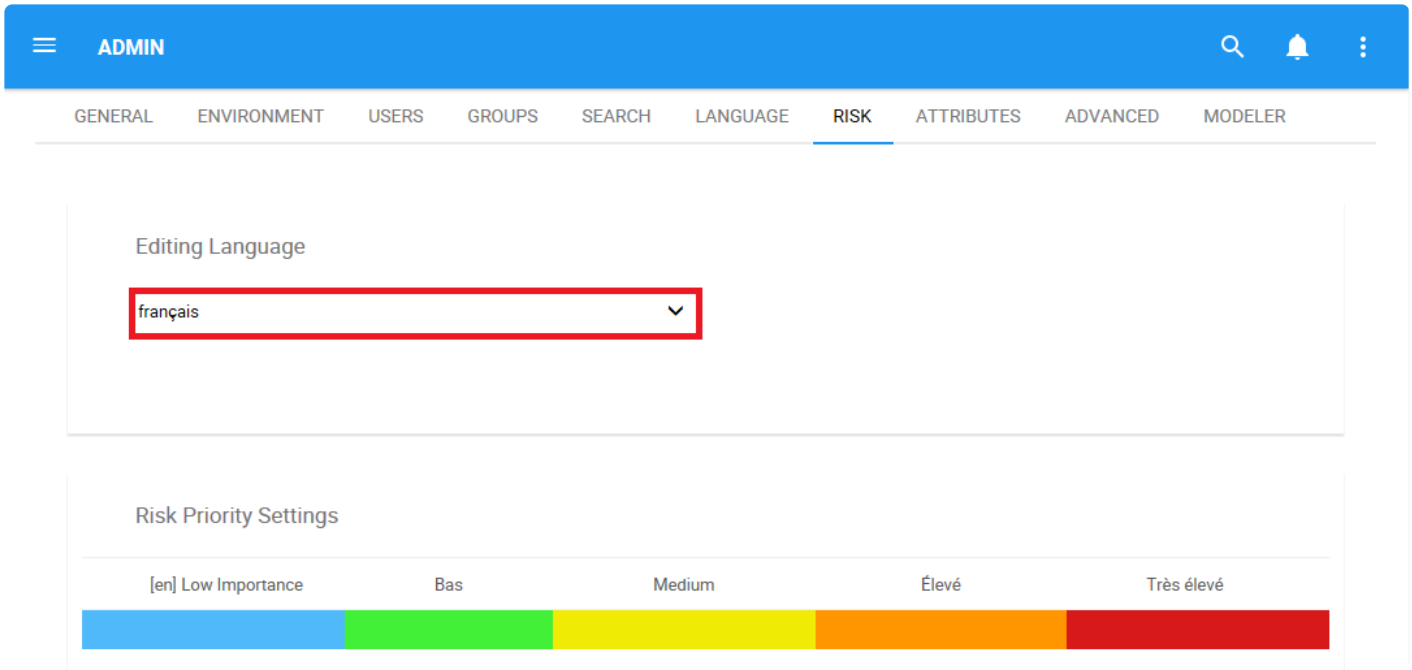
3. Navigate to the Editing Language section and select the “English” box



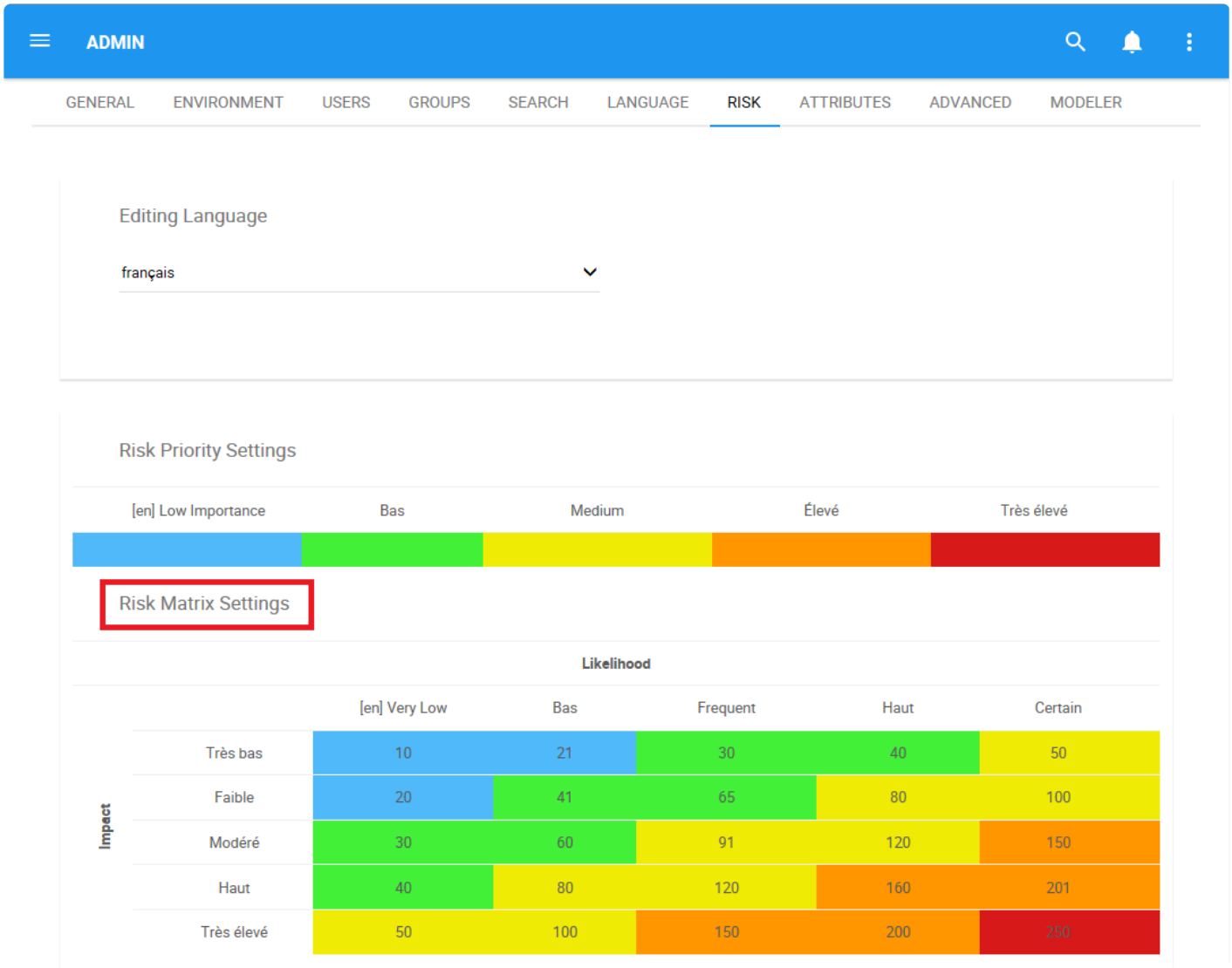
4. This will generate a drop-down menu featuring the languages you are allowed to use and create content for



5. Select the language you want to create Risk Impact content for. For this example, French is chosen.

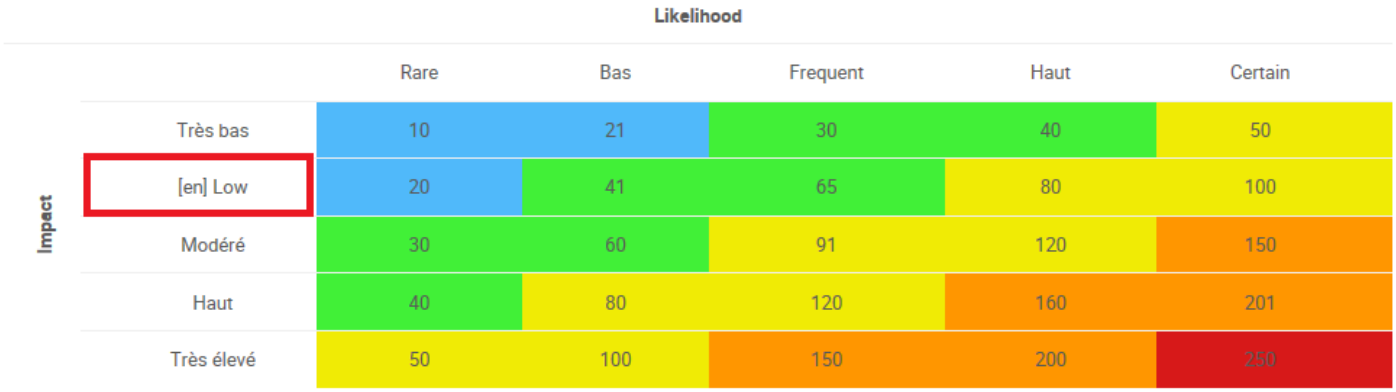


6. Navigate to the Risk Matrix Settings section



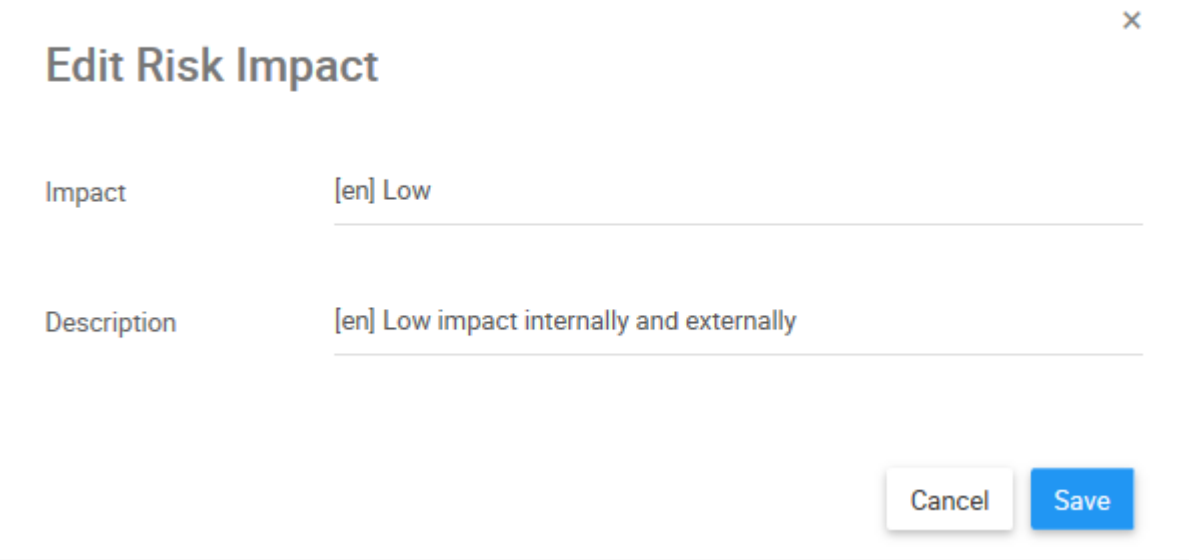
7. Select the Risk Impact you want to edit. For this example, select “[en] Low”

> When the content is available in another language, the language abbreviation in brackets will be displayed. Refer to the section Understanding Content Languages



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



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

9. Select the Save box to confirm changes

Edit Risk Impact
Impact
Faible
Description
Faible impact à l'interne et externe.
Cancel
Save

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.

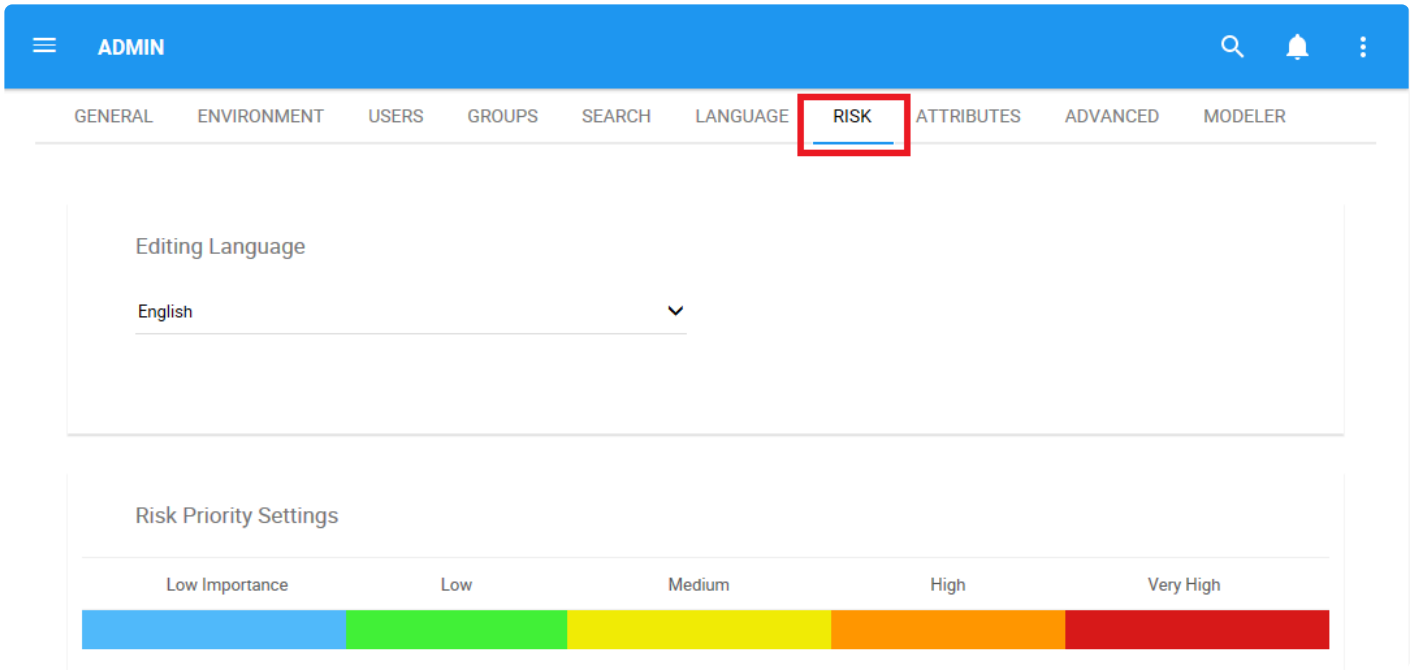
This occurs because the Risk Likelihood and the Risk Impact for the Risk Profile are automatically set by the axis of the Risk Matrix. If Risk Likelihood and Risk Impact content was already inputted in French, they will appear in French under Edit Risk Profile. If the content was not previously inputted 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.

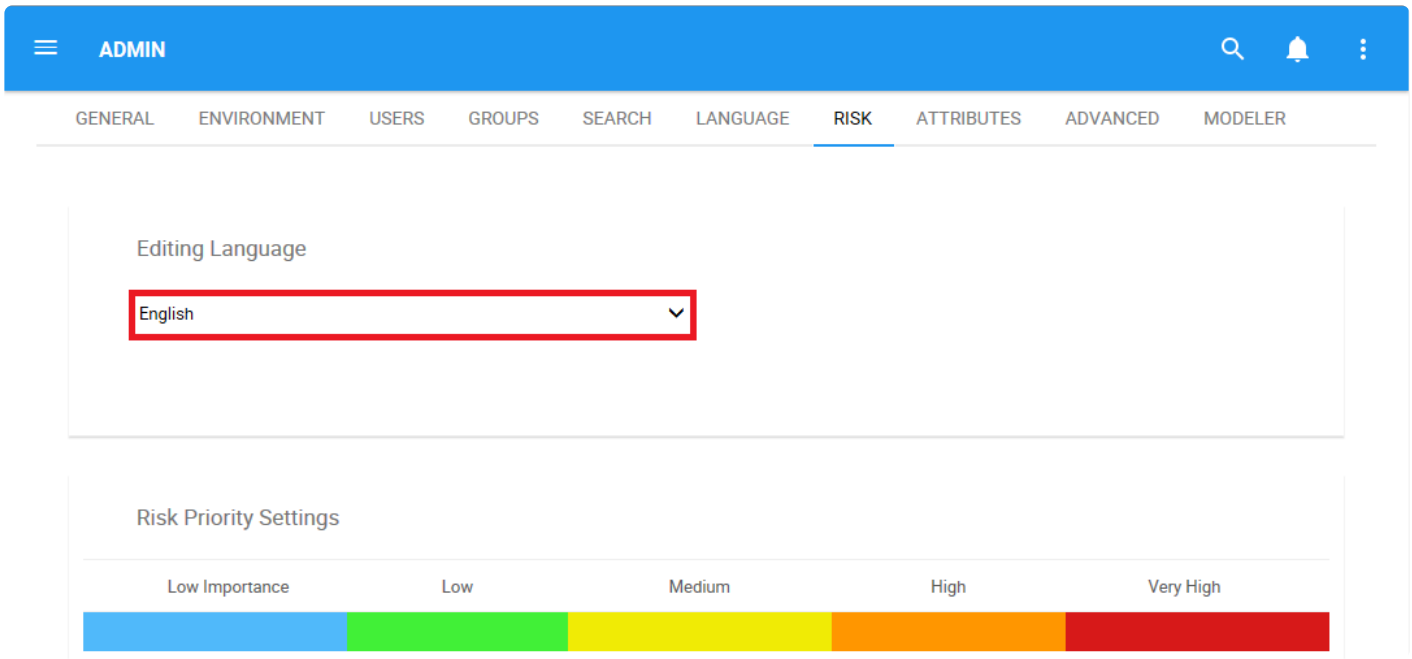
Refer to the section Understanding Content Languages

To View the Risk Profile in a different language, follow the next steps

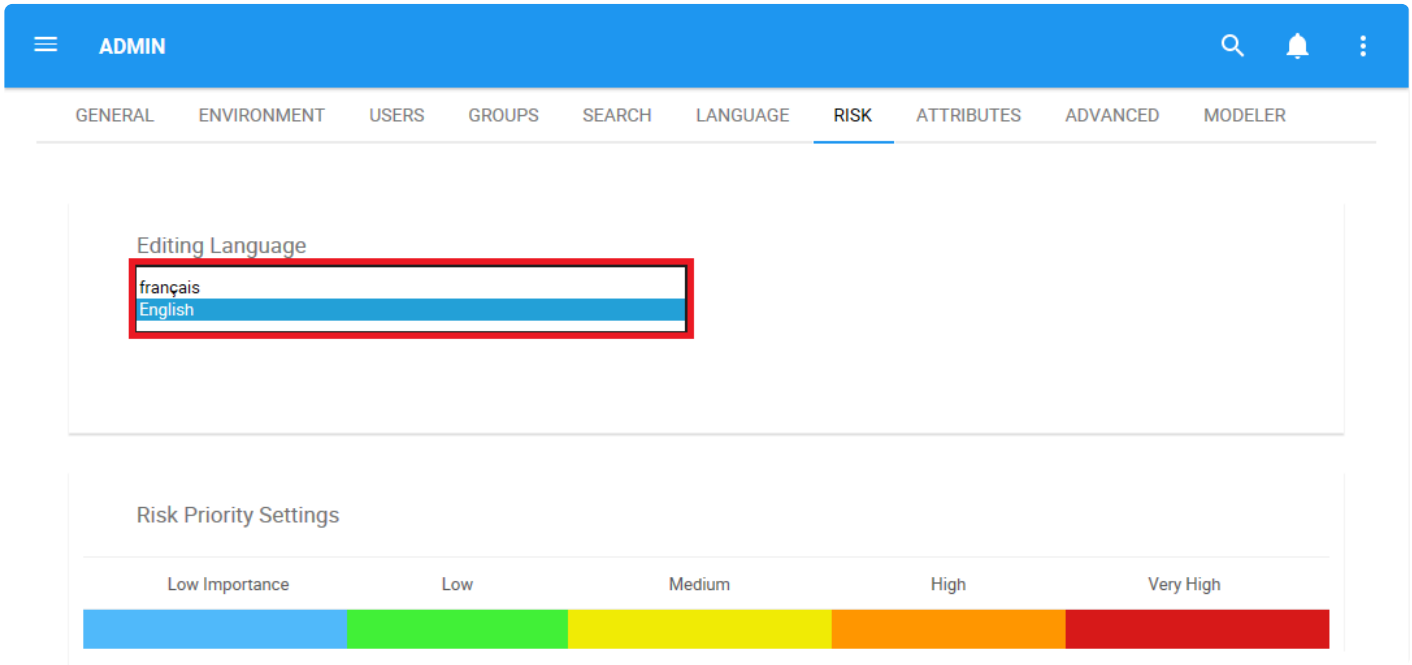
1. Navigate to the System Admin Section
2. Select the Risk tab under the System Admin section



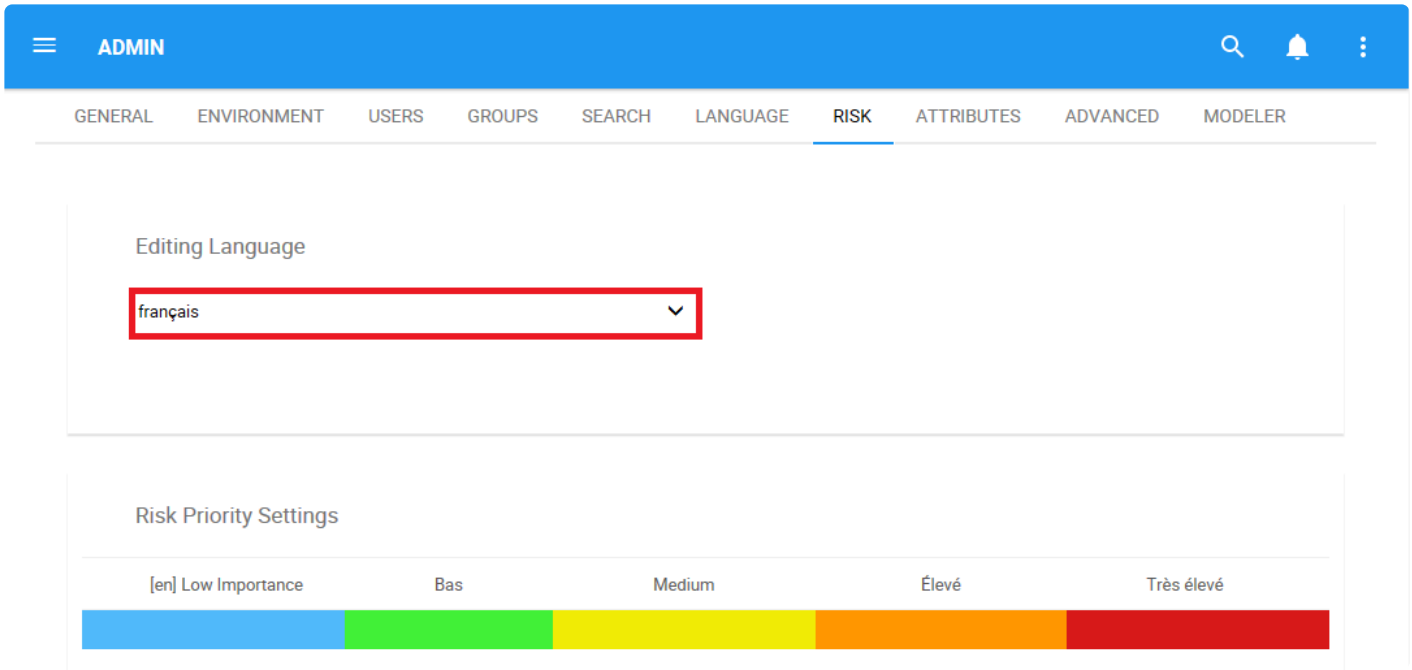
3. Navigate to the Editing Language section and select the “English” box



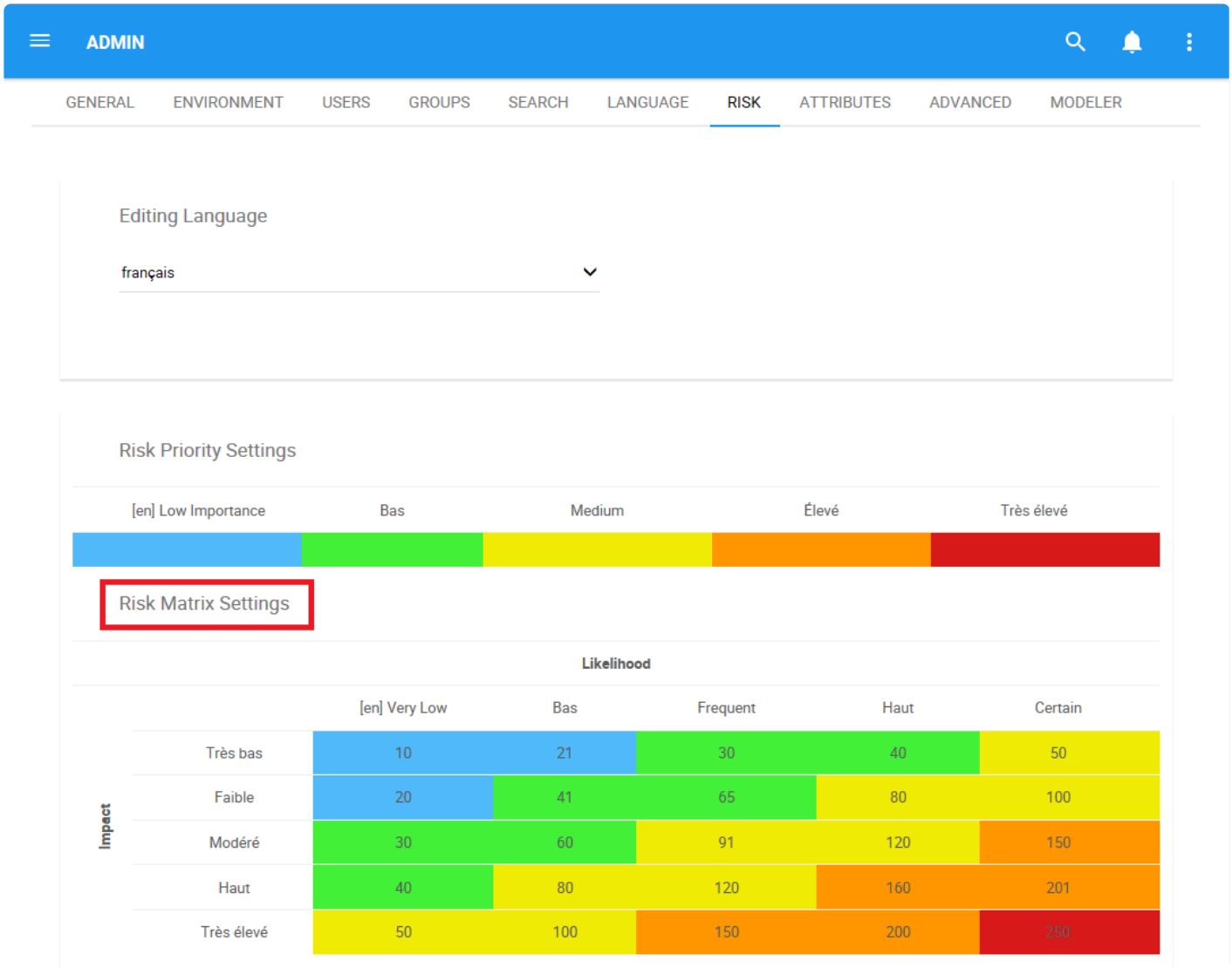
4. This will generate a drop-down menu featuring the languages you are allowed to use and create content for



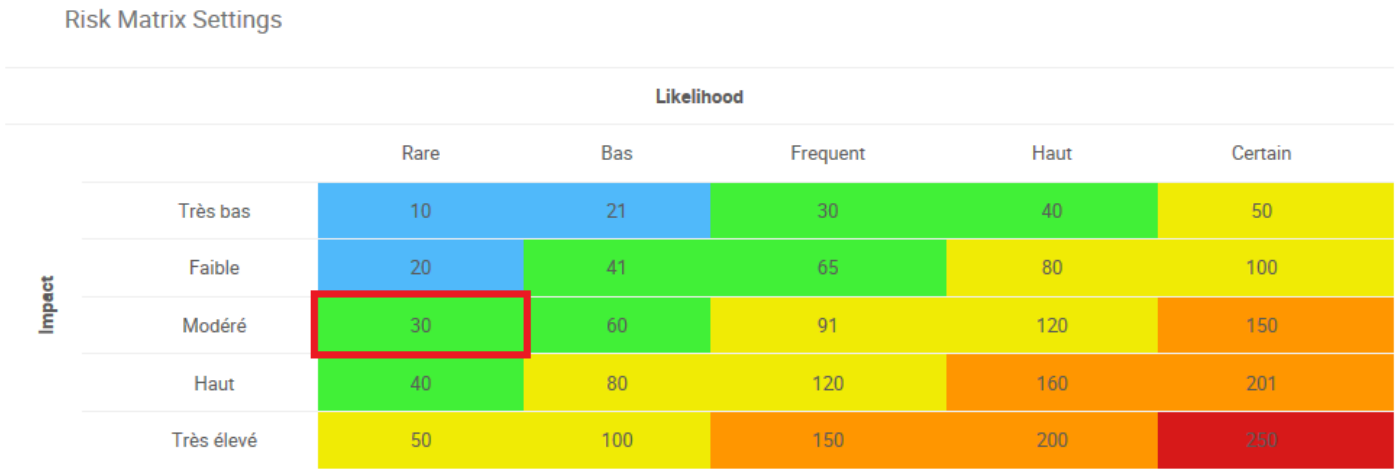
5. Select the language you want to view the Risk Profile in. For this example, French is chosen.



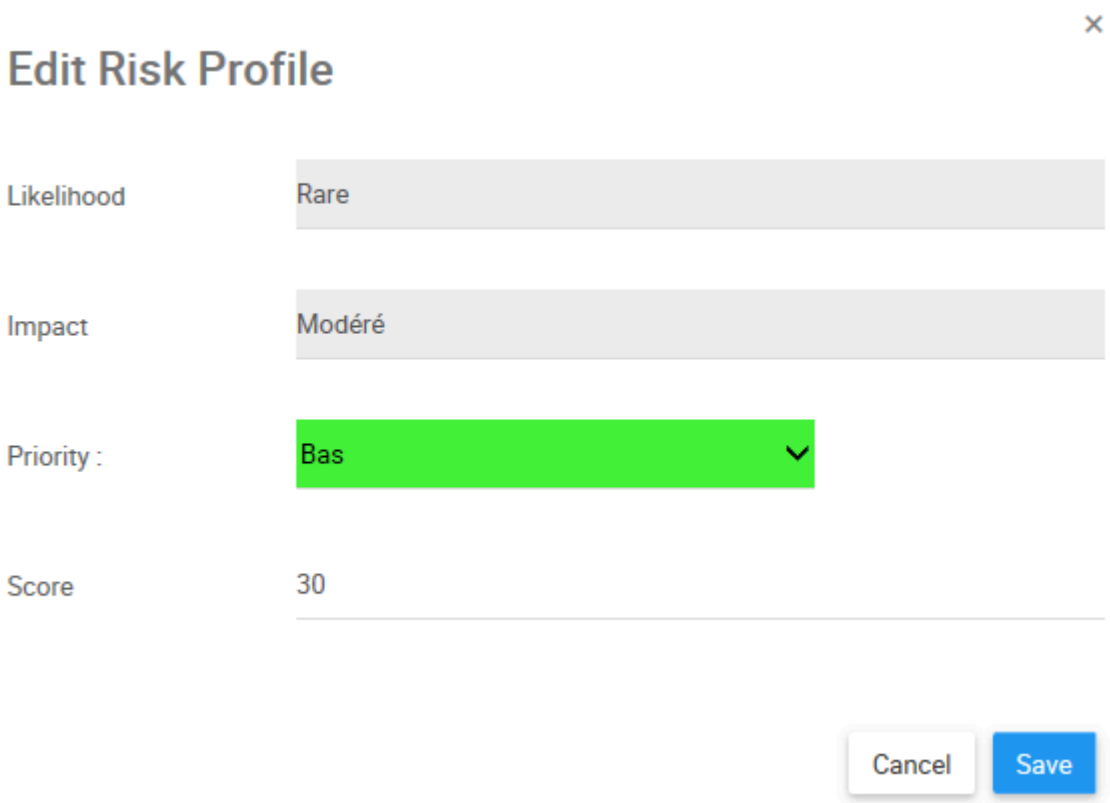
6. Navigate to the Risk Matrix Settings section



7. Select the Risk Profile you want to edit. For this example, select the intersection between “Rare” and “Modéré” with a score of 30



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

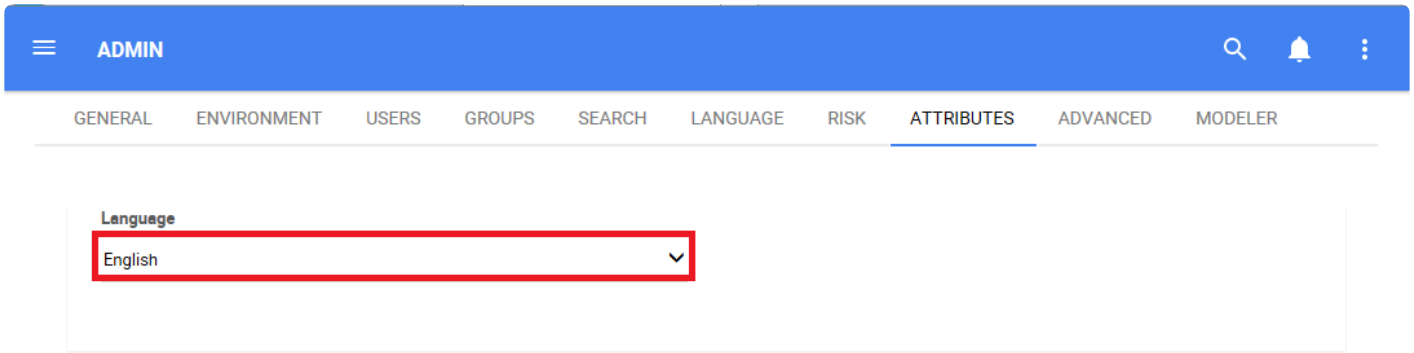
10.8 Attributes

System Admins are responsible to create and determine the Object Types, the Categories, and the Attributes that will create layers of classification for items.

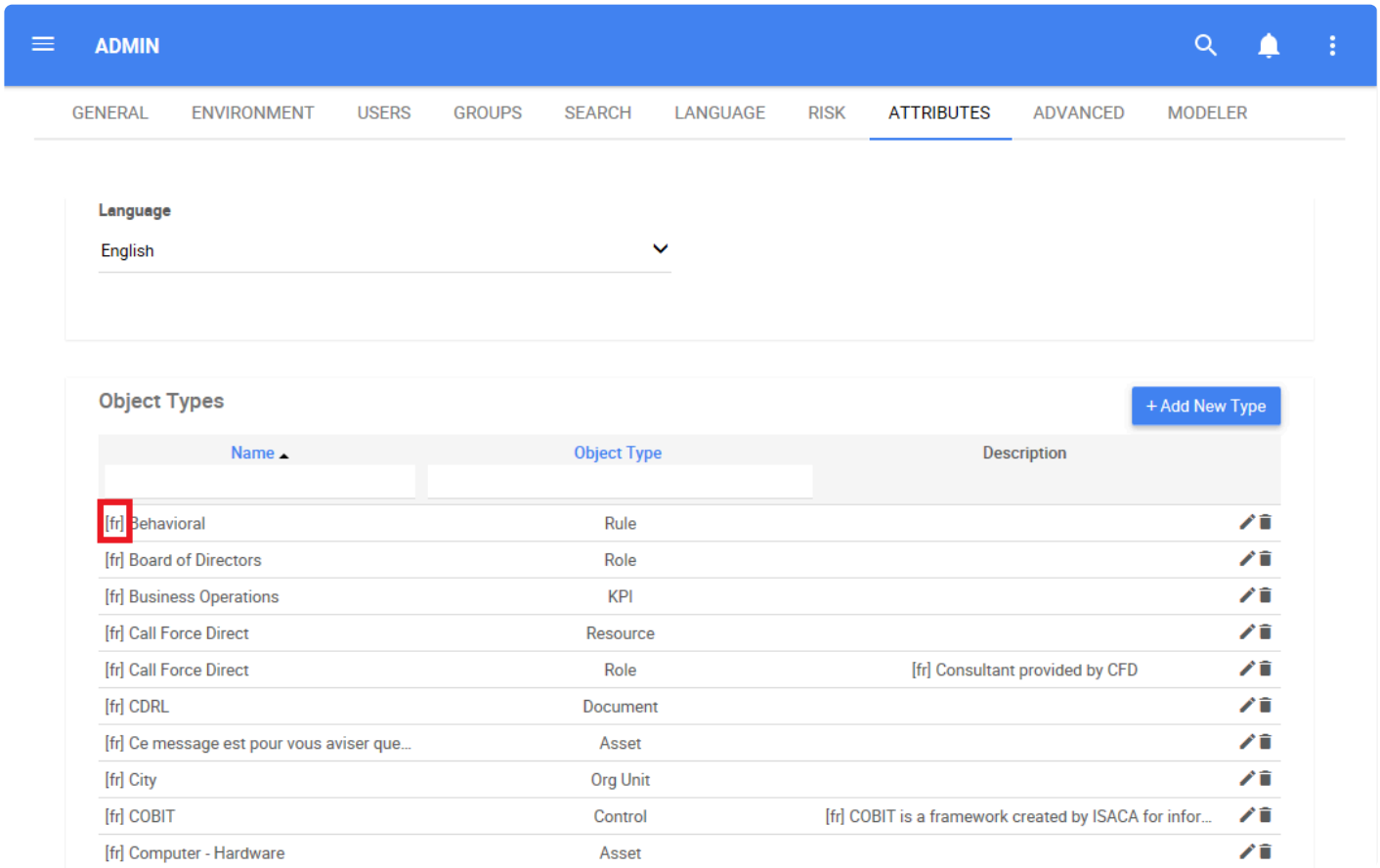
10.8.1 Content Language

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



- 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



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:

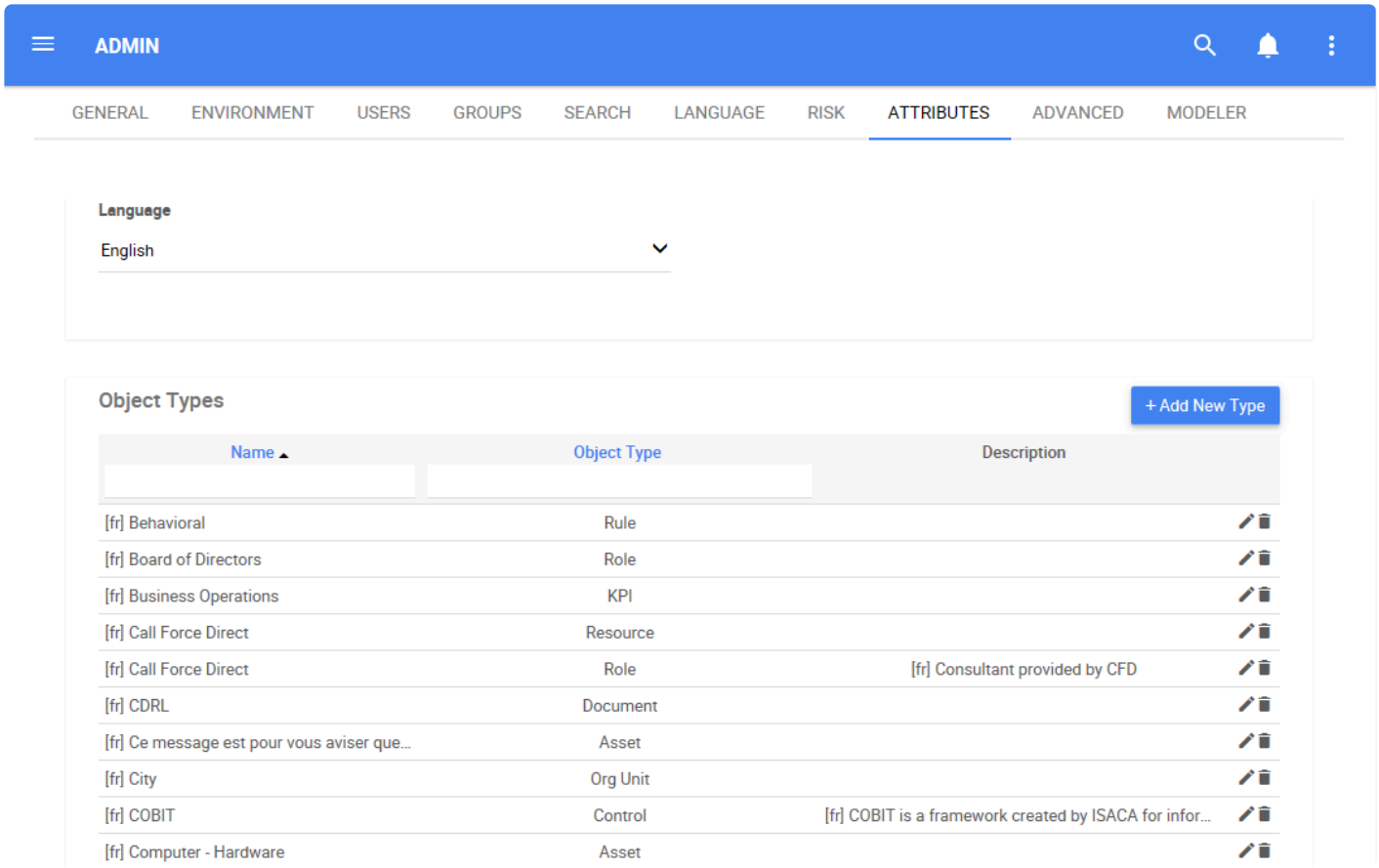
Object Type List
Asset
Attribute
Capability
Control
Document
Entity
KCI
KPI
KRI
Input/Output
Material
Objective
Org Unit
Process
Resource
Risk
Role
Rule
Service

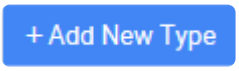
10.8.2.1 Add Object Type

How to Add an Object Type

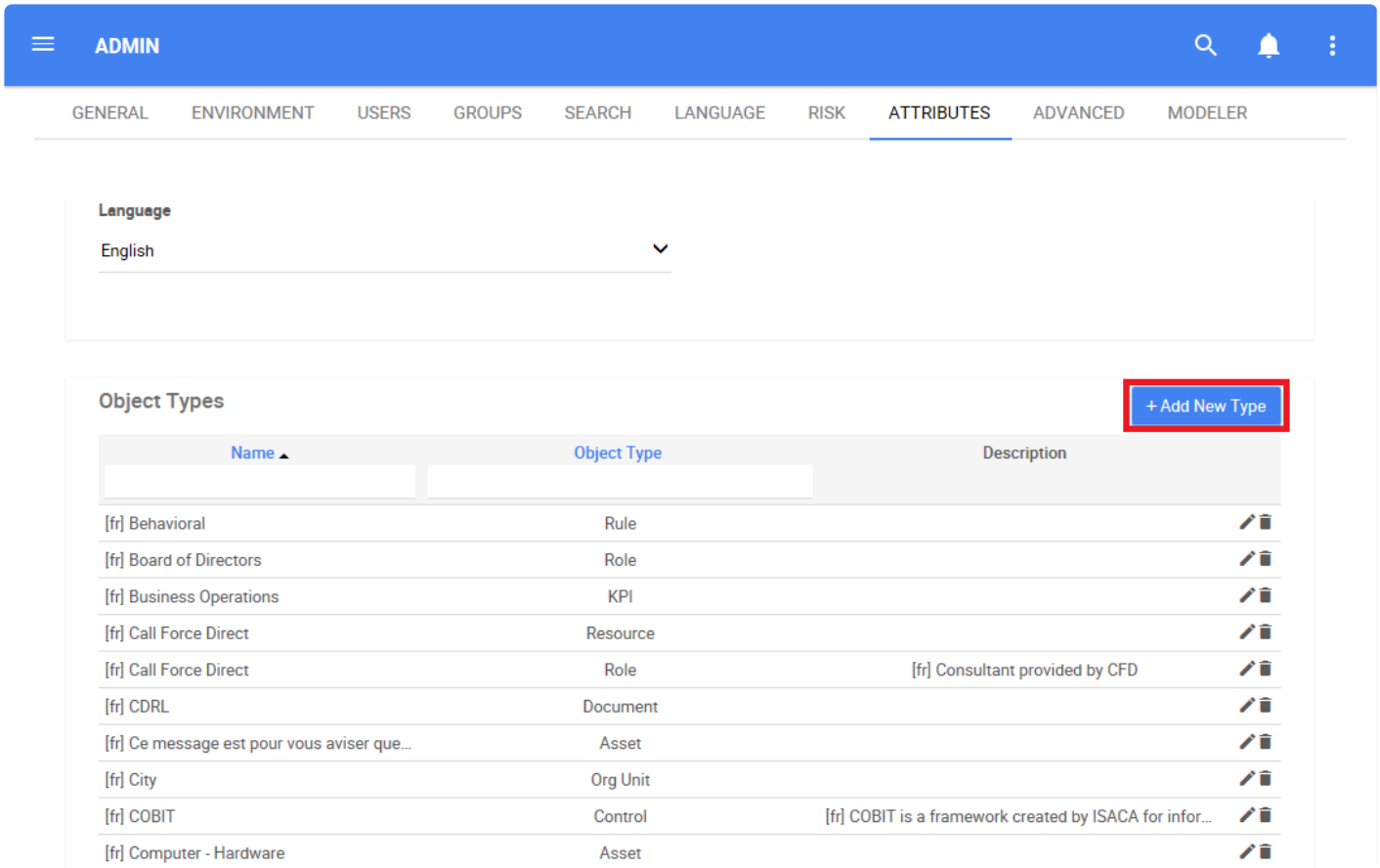
1. Navigate to the System Admin Section

2. Select the Attributes tab under the System Admin section

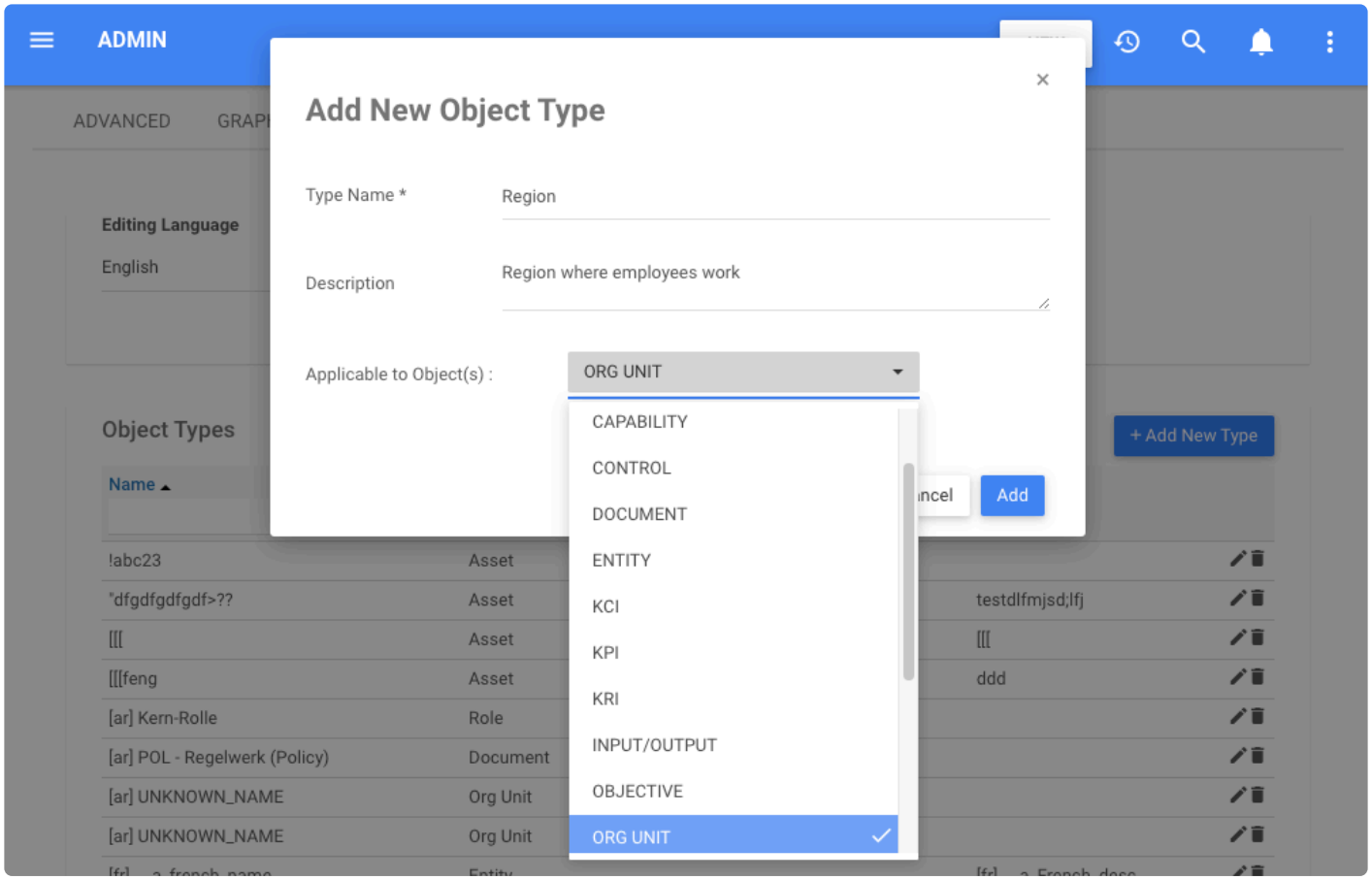


3. To add a new object type, select the 

button



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



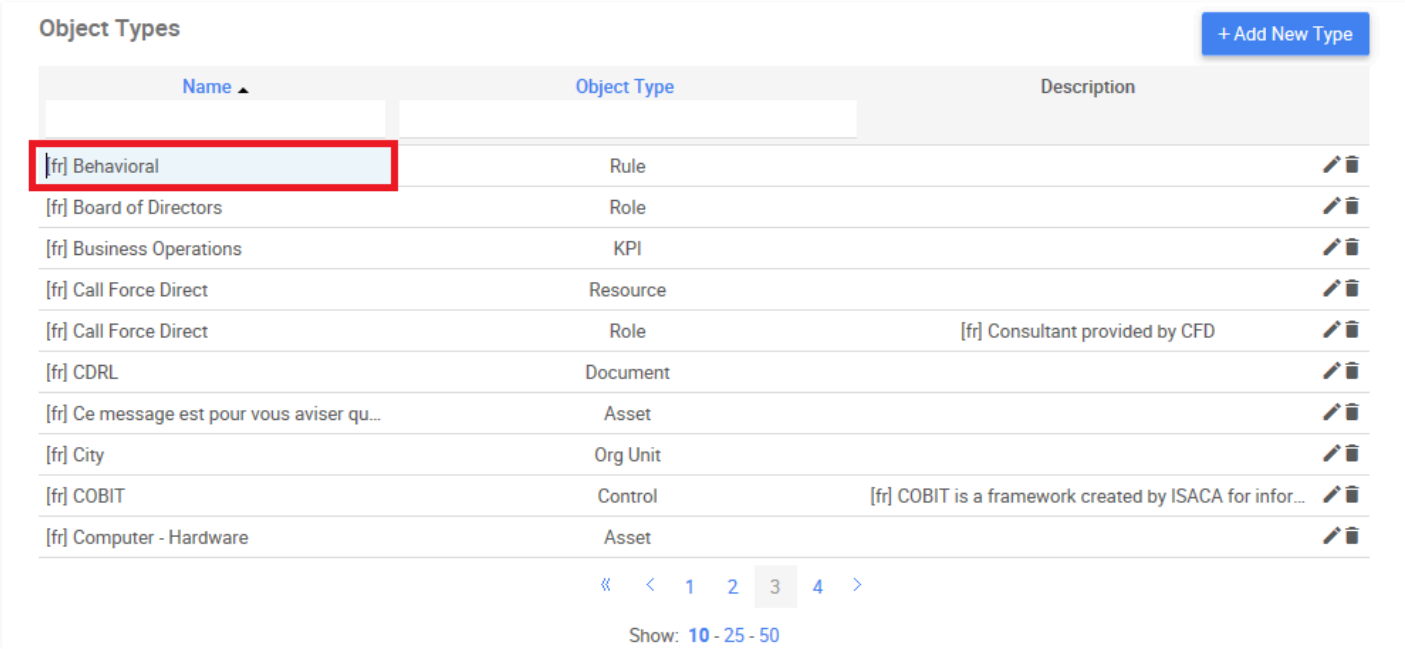
5. After inputting the appropriate information, select the **Add** button and the Object Type will be added to the EPC.

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

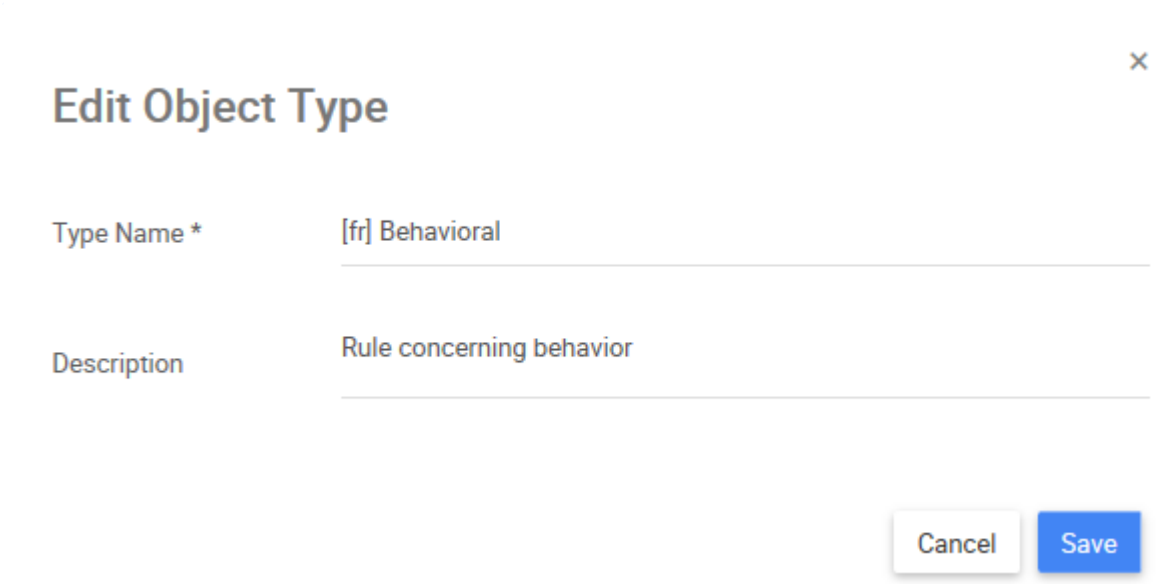
In line edits can be performed by selecting item's name directly within the object type list. Simply click on the name you desire to edit and type in the edited name



Editing Window

1. For further editing capabilities, navigate the cursor and select the icon featured on the right hand-side of each object type

2. Selecting this item will re-open the full user editing page. System Administrators can edit the Object Type and save

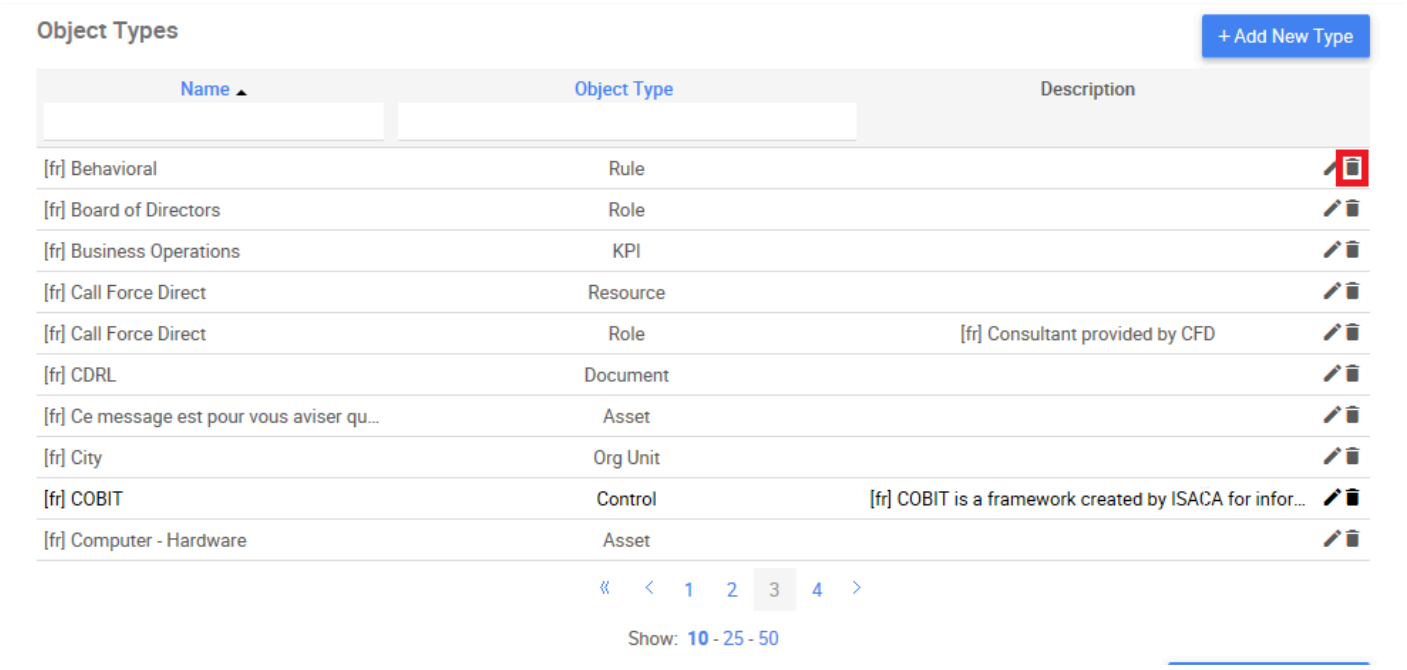


NOTE: System Admins **can only edit** the Type Name and the Description of an Object Type. If they want to edit the type, they need to delete the object type and add a new one

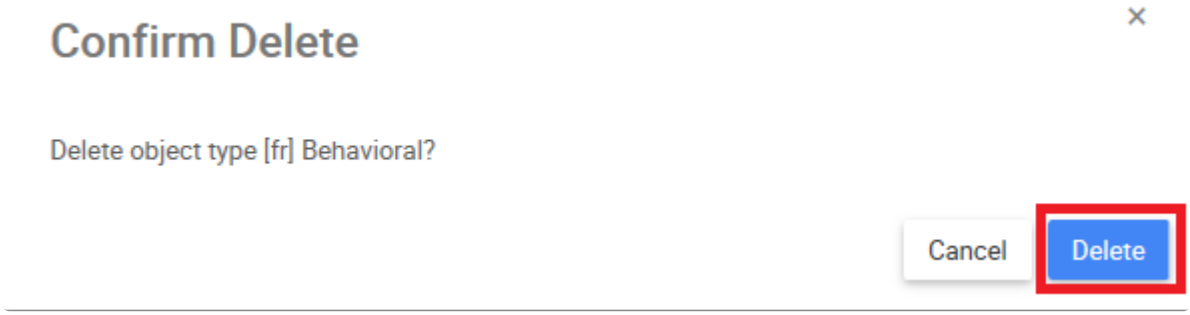
10.8.2.3 Delete Object Type

How to delete Object Types

1. Navigate the cursor and select the icon for the Object Type you want to delete



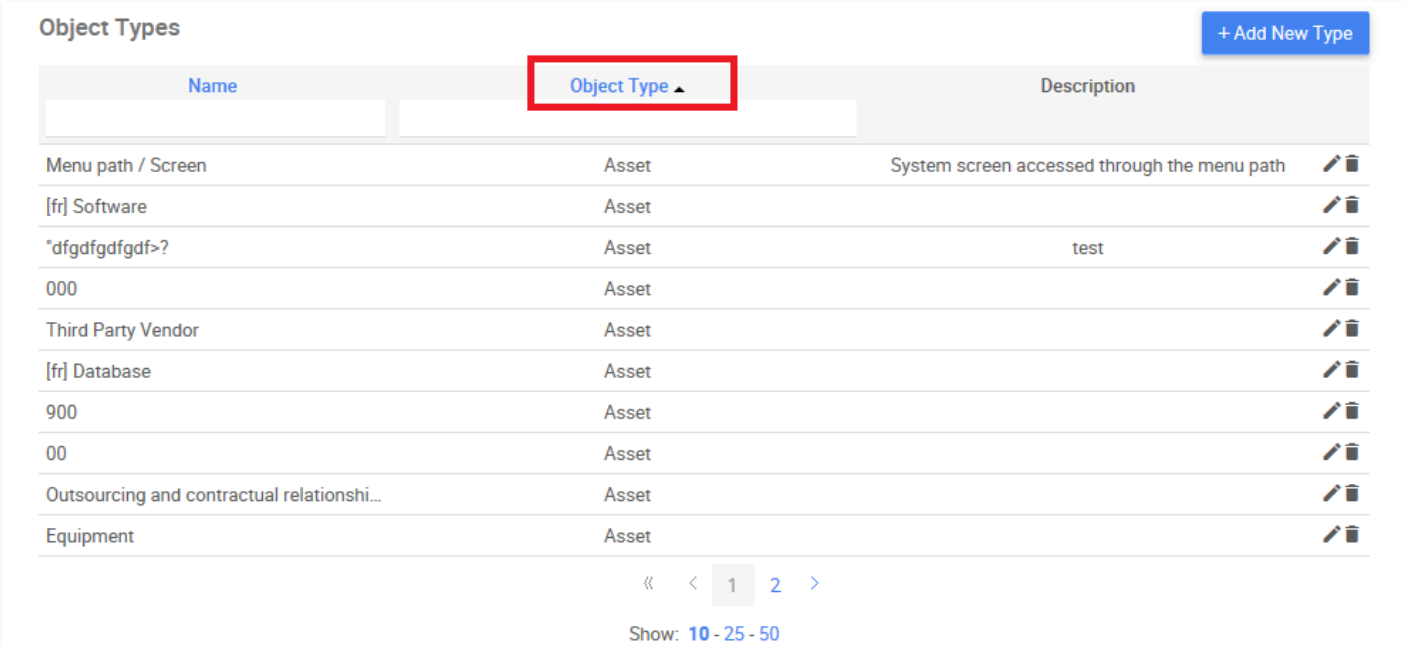
2. The following box will appear and you will be able to delete the Object Type by clicking on the “Delete” box



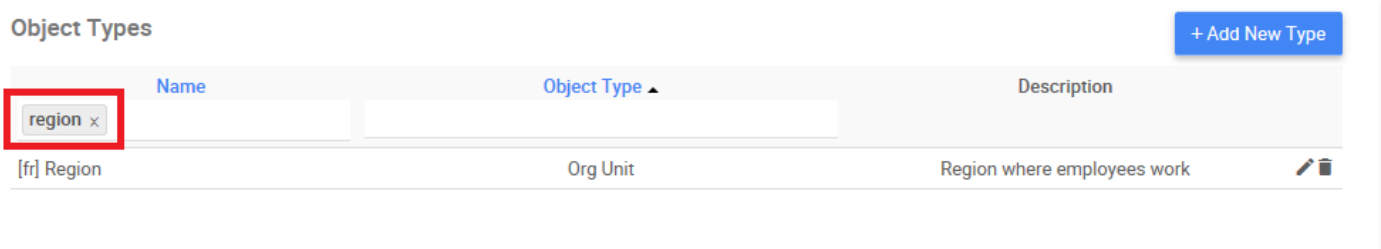
10.8.2.4 Search for Object Types

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



- 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



- 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
	Org Unit ×	
[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

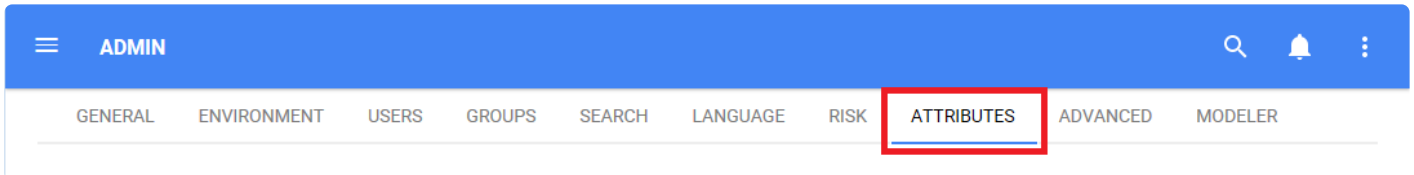
System Admins are responsible to create Categories to add a layer of classification for items. Admins choose which objects can be part of the category. Categories are used by modelers to items into categories

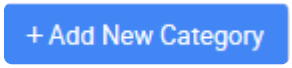
10.8.3.1 Add Category

How to Add a Category

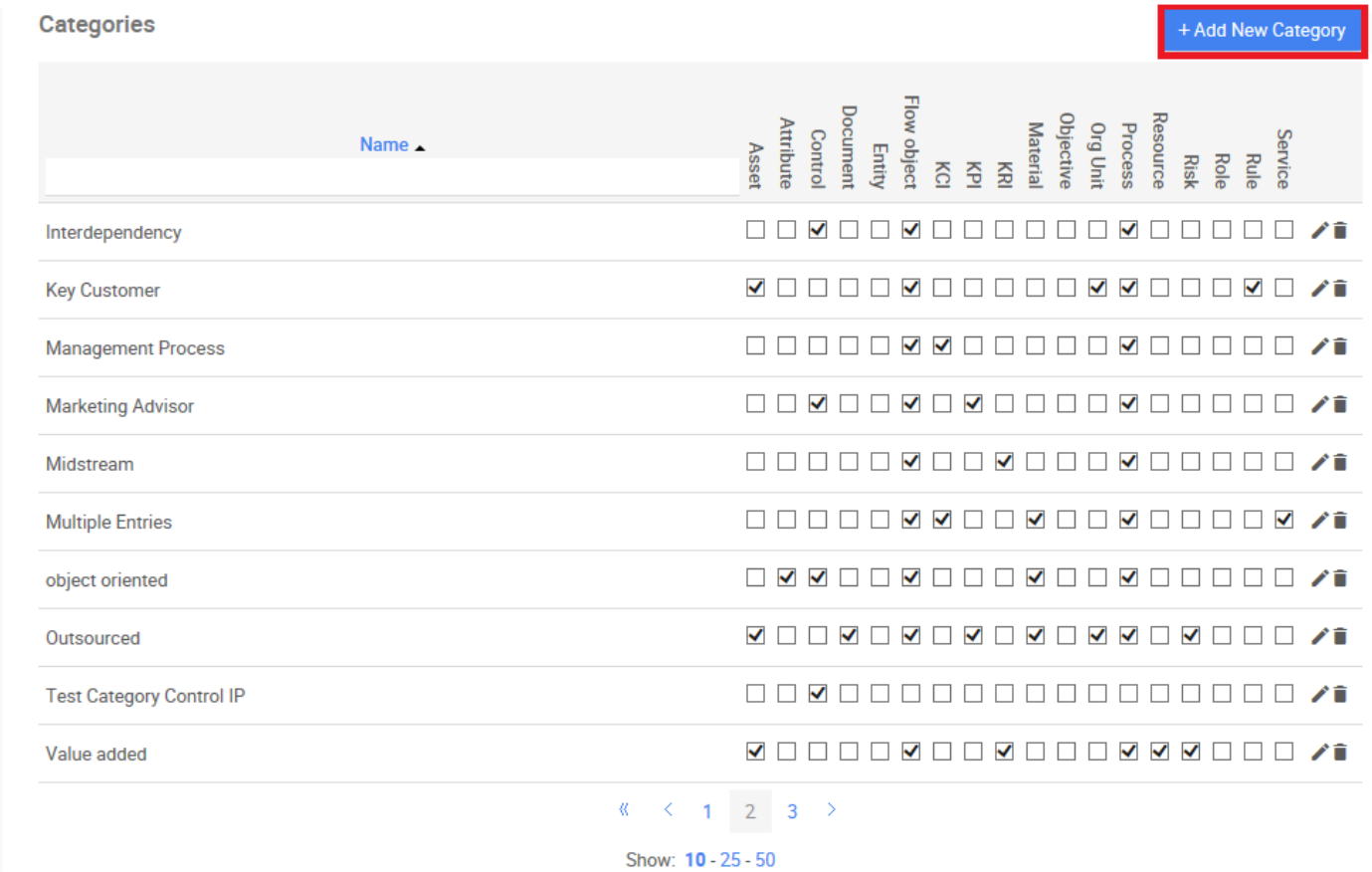
1. Navigate to the System Admin Section

2. Select the Attributes tab under the System Admin section

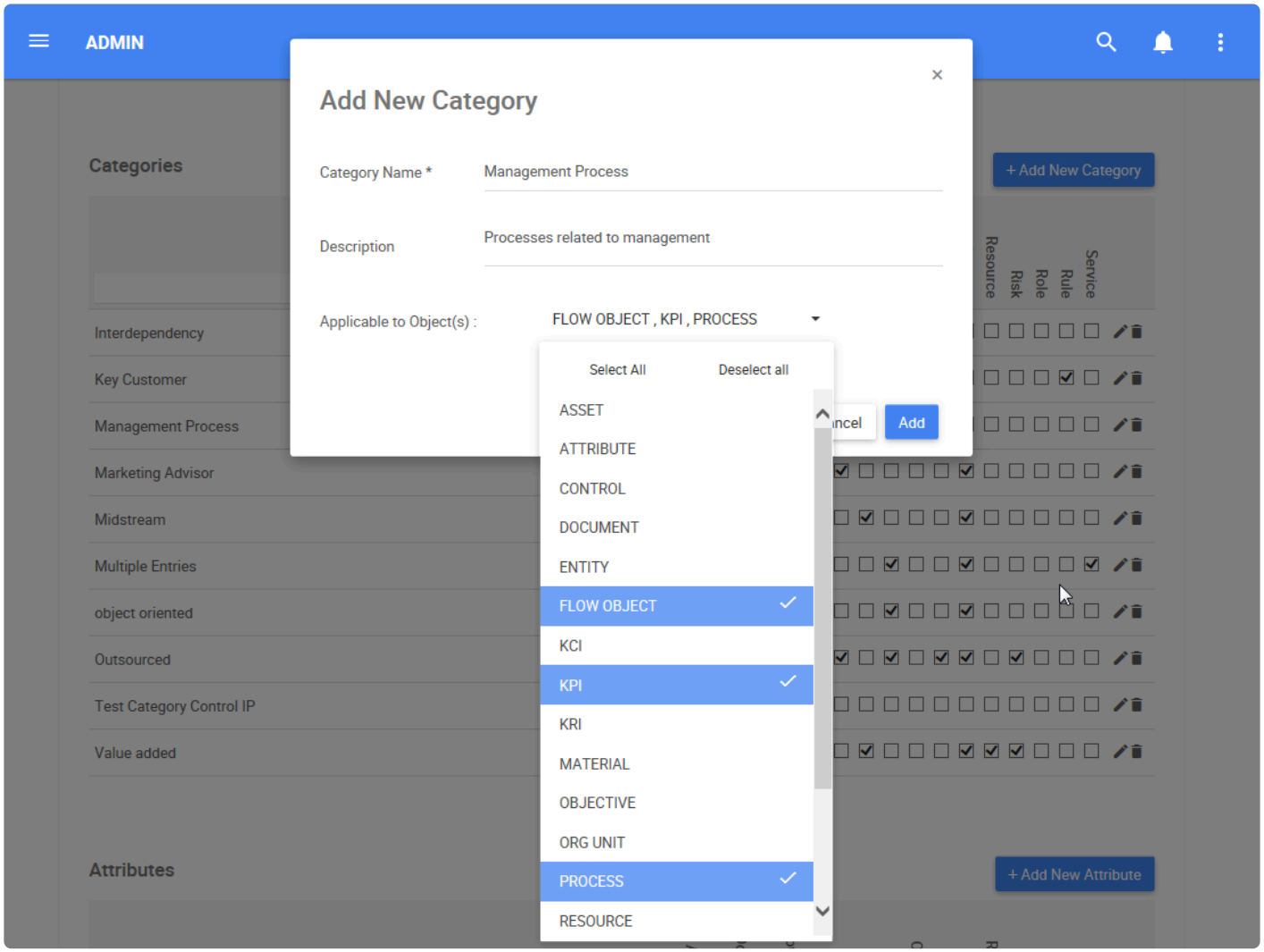


3. To add a new Category, select the 

button



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”



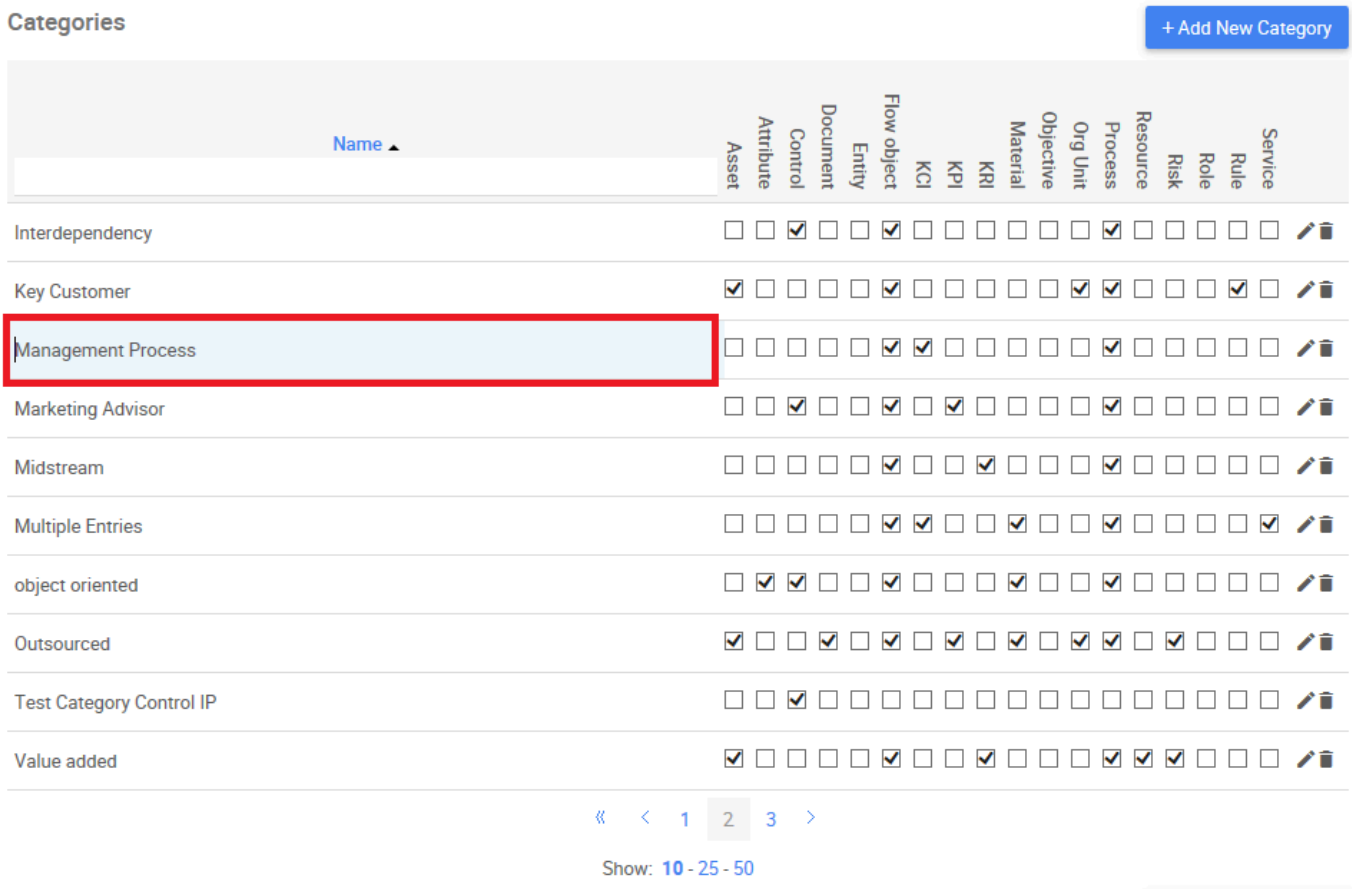
5. After inputting the appropriate information, select the **Add** button and the Category will be added to the EPC.

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



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

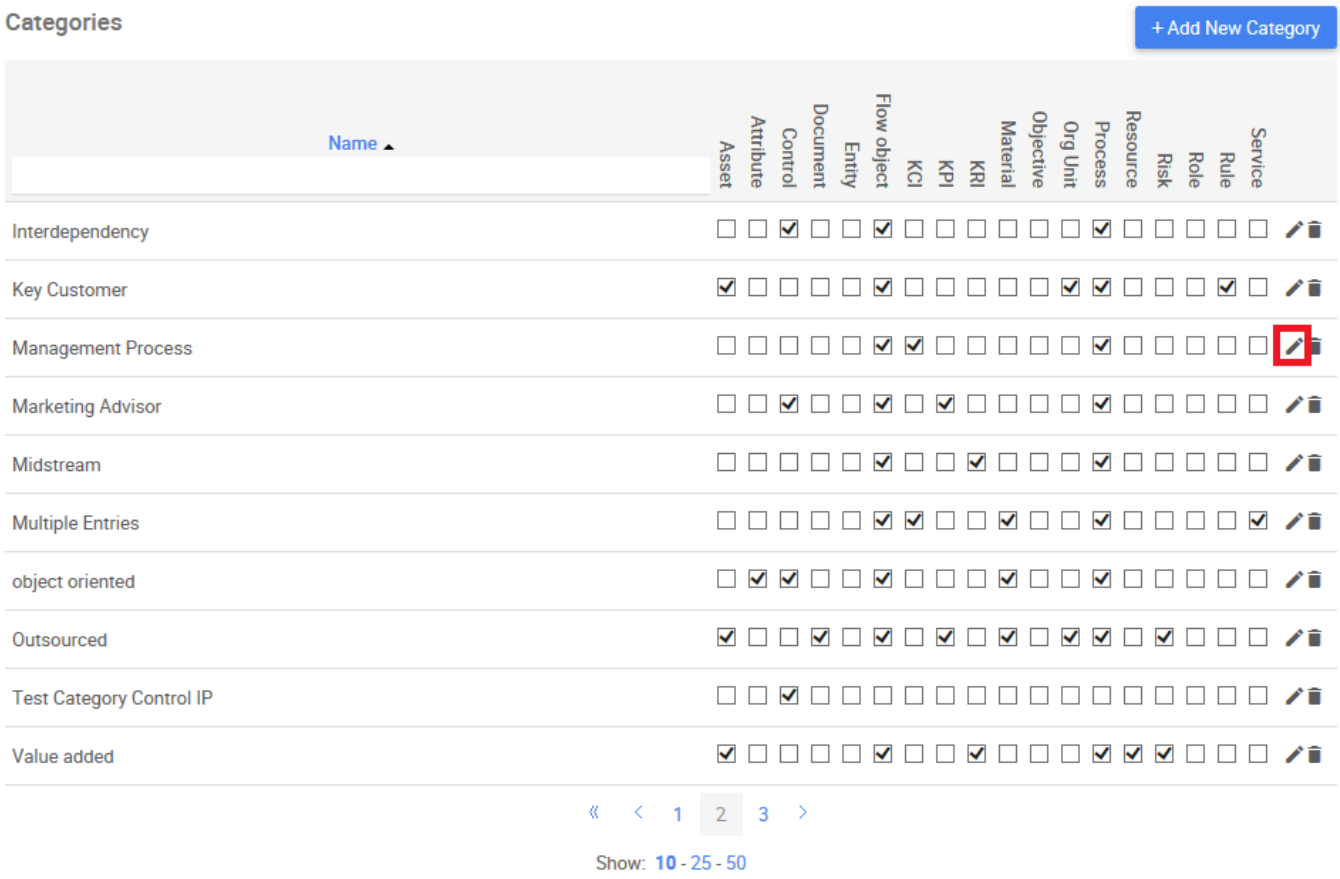
Name	Asset	Attribute	Control	Document	Entity	Flow object	KCI	KPI	KRI	Material	Objective	Org Unit	Process	Resource	Risk	Role	Rule	Service
Interdependency	☐	☐	☑	☐	☐	☑	☐	☐	☐	☐	☐	☐	☑	☐	☐	☐	☐	☐
Key Customer	☑	☐	☐	☐	☐	☑	☐	☐	☐	☐	☐	☑	☑	☐	☐	☐	☑	☐
Management Process	☐	☐	☐	☐	☐	☑	☑	☐	☐	☐	☐	☐	☑	☐	☐	☐	☐	☐
Marketing Advisor	☐	☐	☑	☐	☐	☑	☐	☑	☐	☐	☐	☐	☑	☐	☐	☐	☐	☐
Midstream	☐	☐	☐	☐	☐	☑	☐	☐	☑	☐	☐	☐	☑	☐	☐	☐	☐	☐
Multiple Entries	☐	☐	☐	☐	☐	☑	☑	☐	☐	☑	☐	☐	☑	☐	☐	☐	☐	☑
object oriented	☐	☑	☑	☐	☐	☑	☐	☐	☐	☑	☐	☐	☑	☐	☐	☐	☐	☐
Outsourced	☑	☐	☐	☑	☐	☑	☐	☑	☐	☑	☐	☑	☑	☐	☑	☐	☐	☐
Test Category Control IP	☐	☐	☑	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Value added	☑	☐	☐	☐	☐	☑	☐	☐	☑	☐	☐	☐	☑	☑	☑	☐	☐	☐

« ‹ 1 2 3 ›

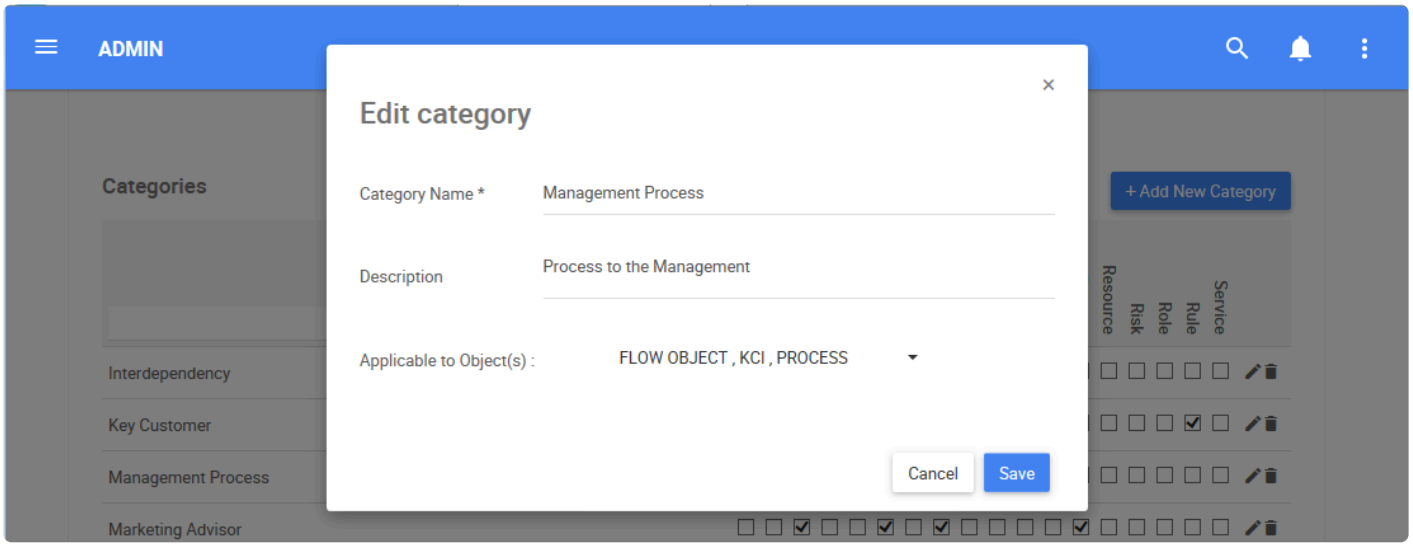
Show: 10 - 25 - 50

Editing Window

1. For further editing capabilities, navigate the cursor and select the icon featured on the right hand-side of each Category



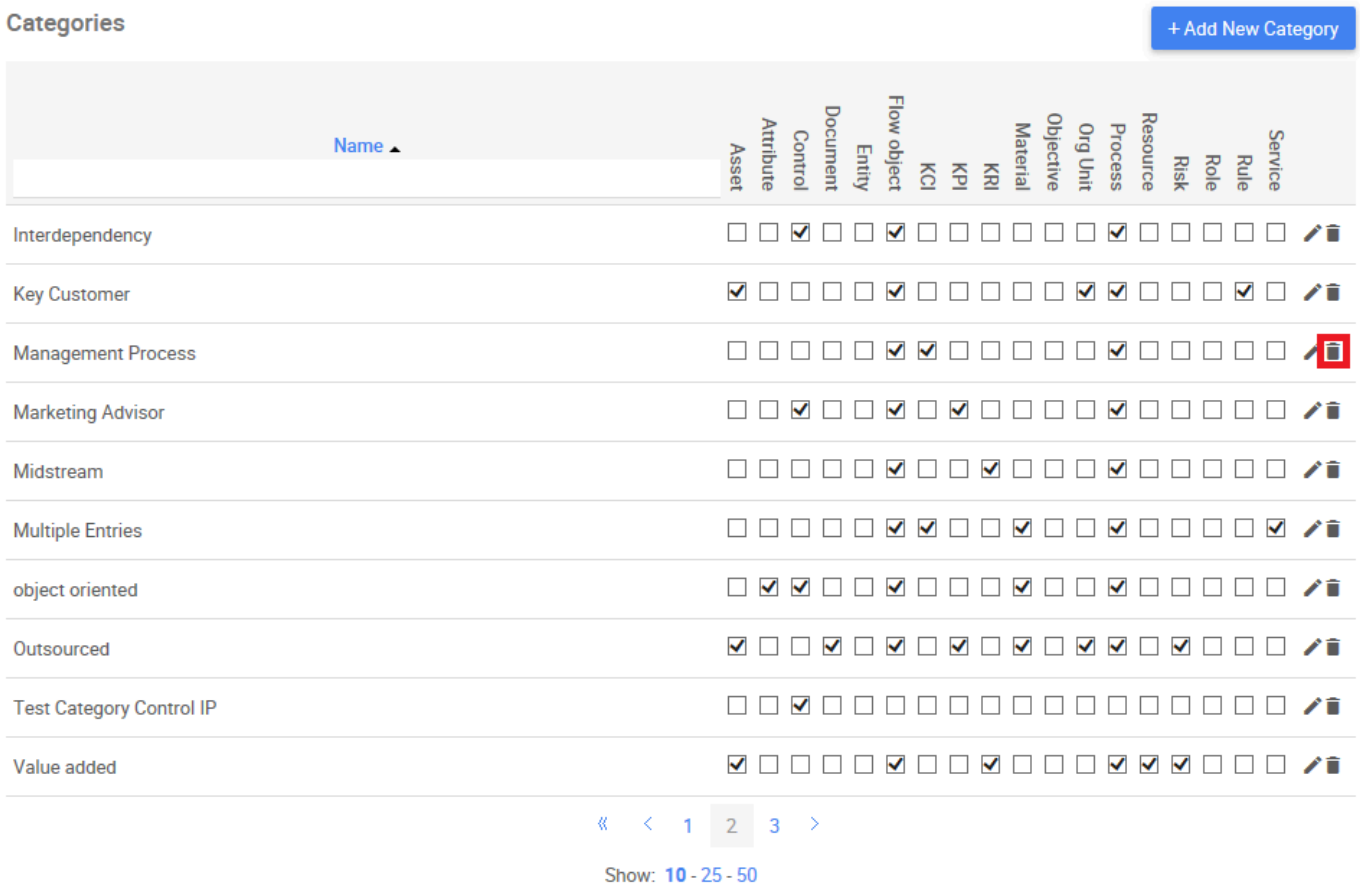
2. Selecting this item will re-open the full user editing page. System Administrators can edit the Category and save



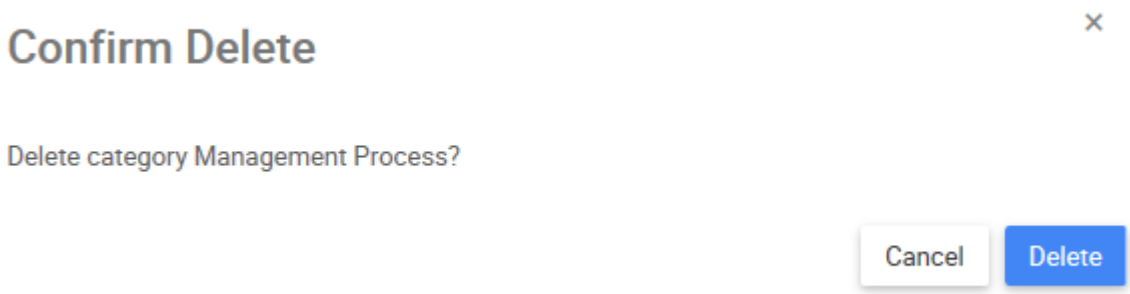
10.8.3.3 Delete Category

How to delete Categories

1. Navigate the cursor and select the icon for the Category you want to delete



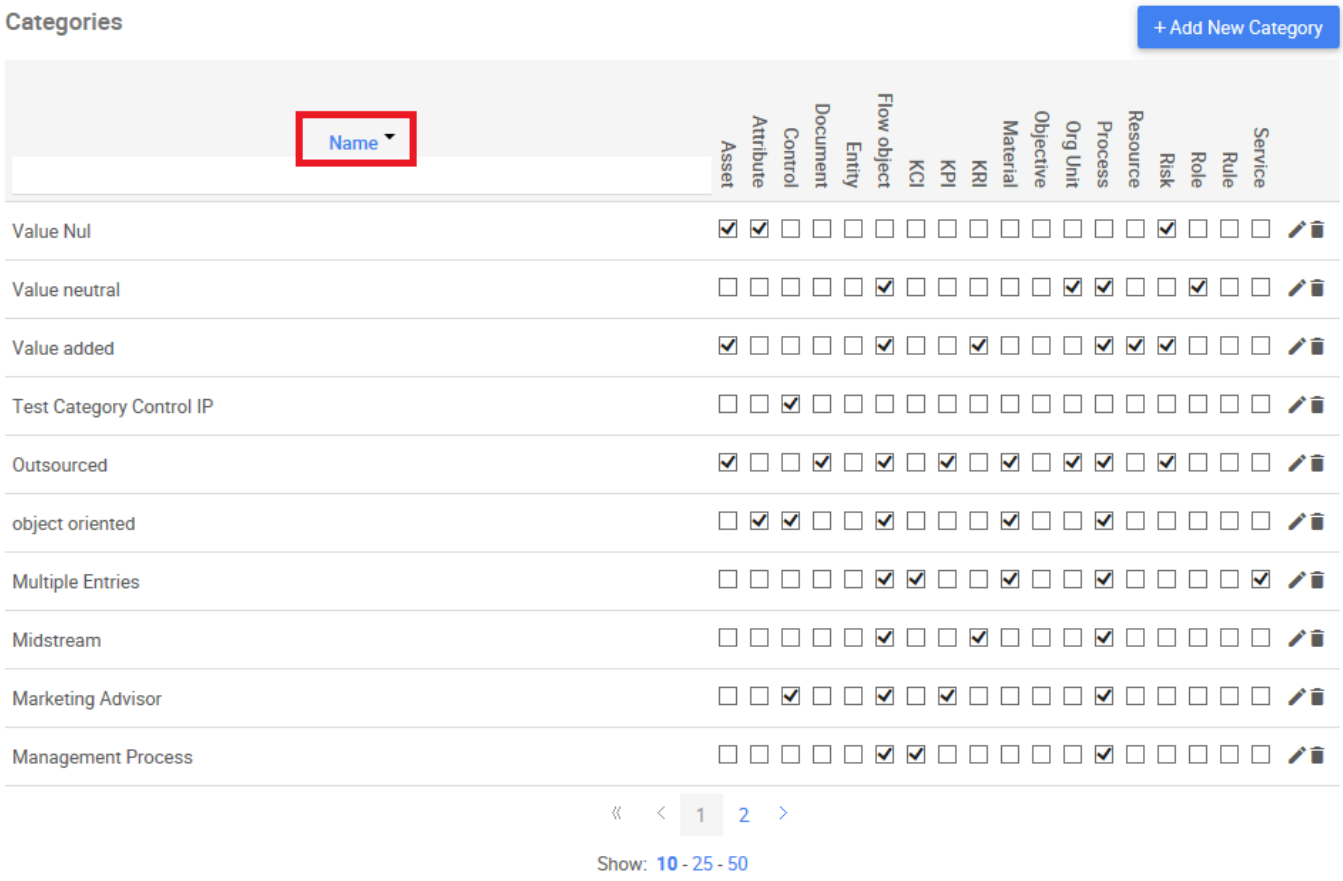
2. The following box will appear and you will be able to delete the Category by clicking on the “Delete” box



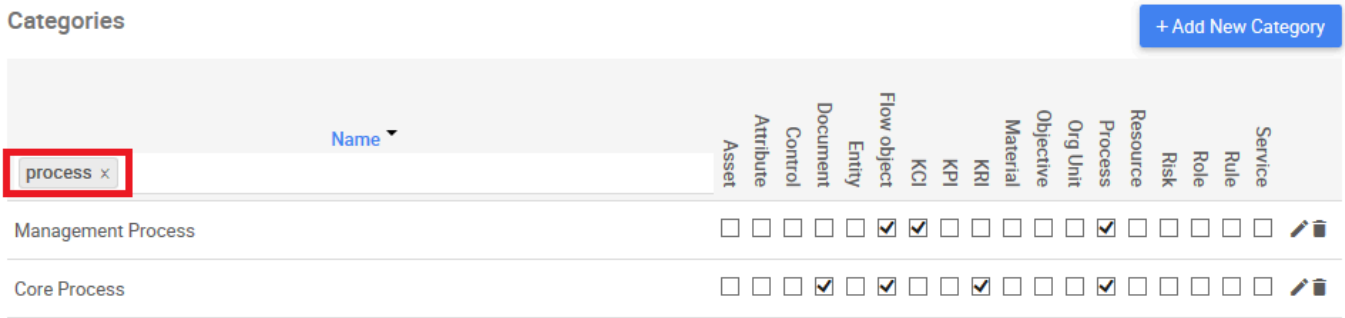
10.8.3.4 Search for Categories

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.



- 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



10.8.4 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 automatically appear on the object in the Modeler section as well on the Analysis section under the Details tab on the WebApp.

System Administrators can:

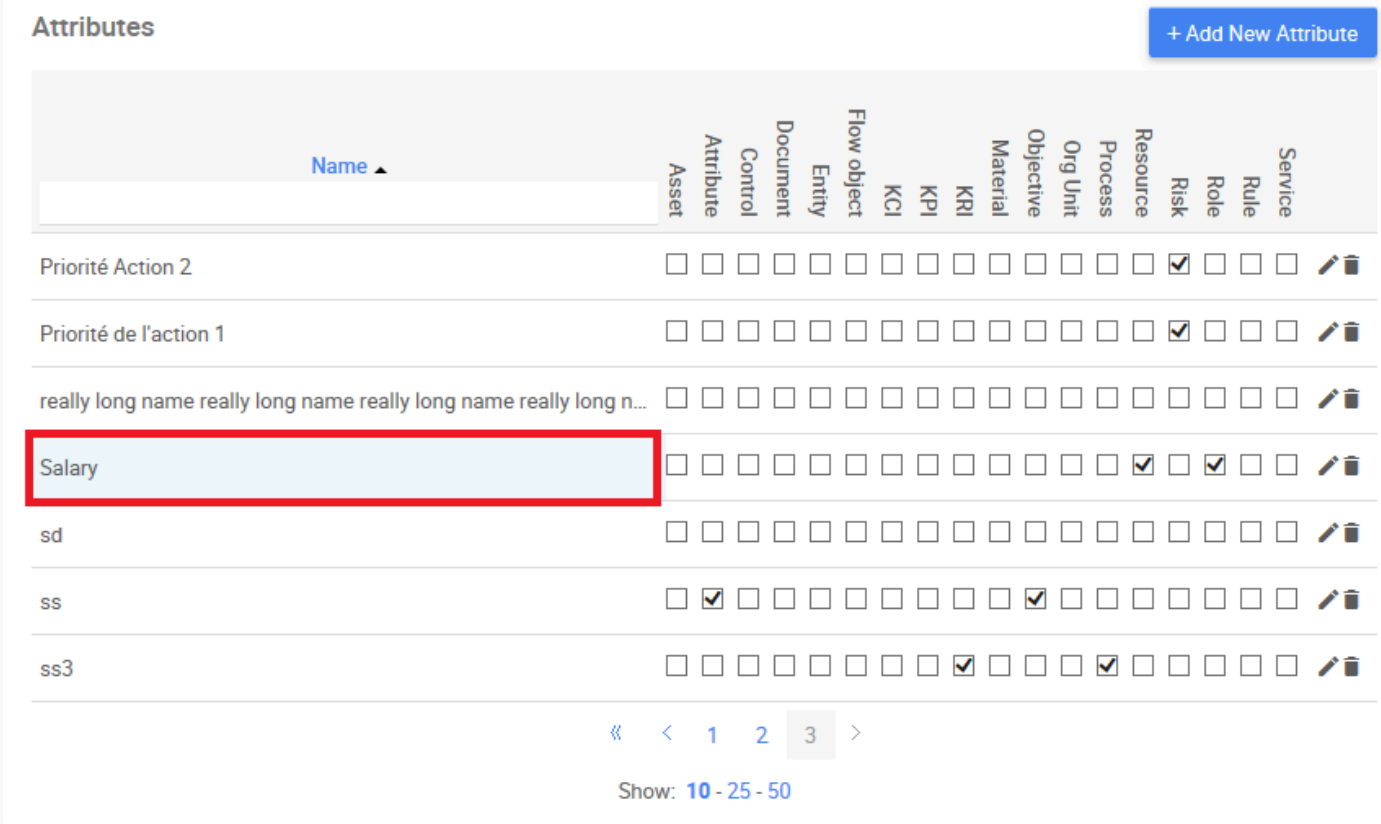
1. Create and add a new system attributes
2. Edit existing attributes
3. Delete attributes
4. Search for attributes

10.8.4.2 Edit Attribute

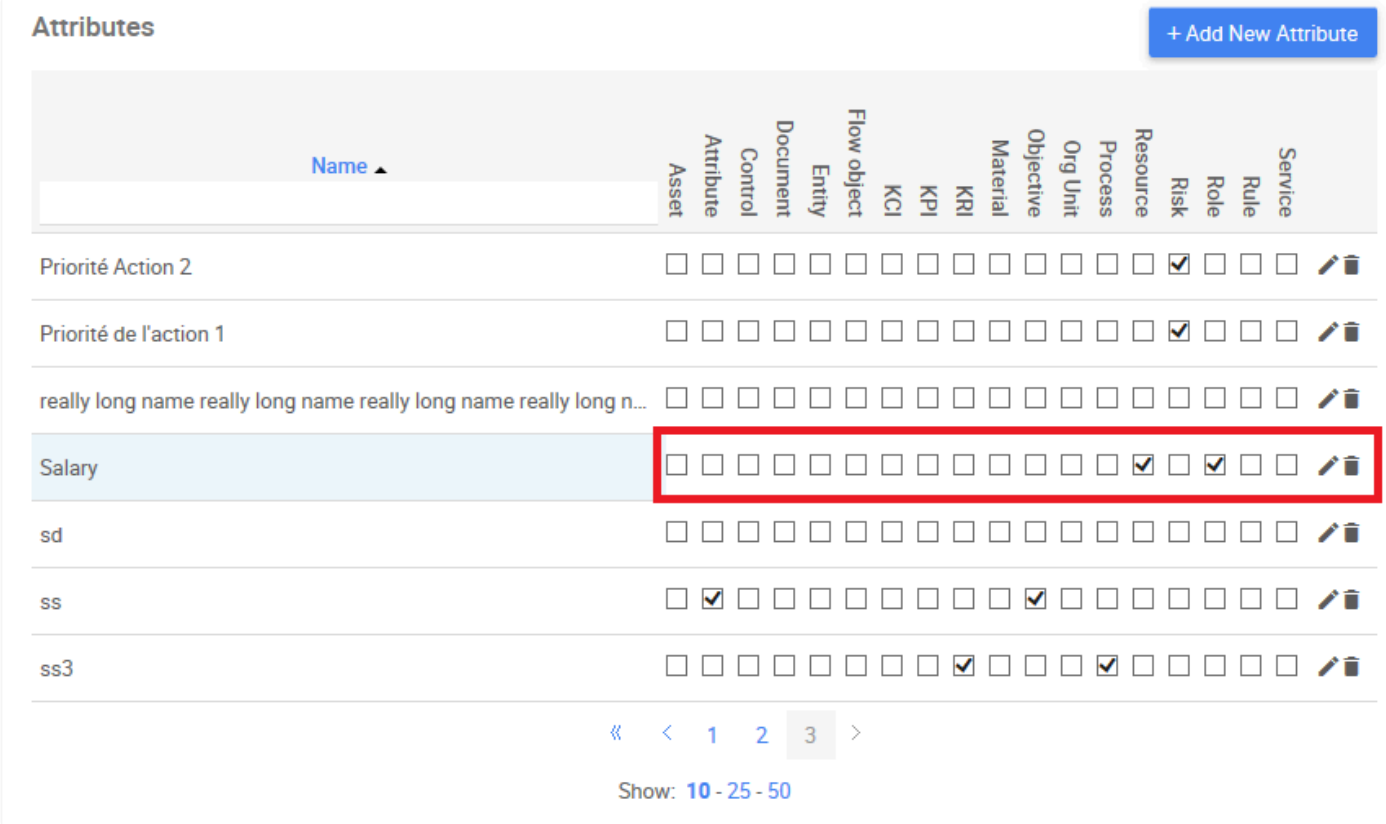
When needed, administrators can edit Attributes. System Admins can perform in-line edits for information displayed in the object type list, or can navigate to the edit section for further editing capabilities.

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

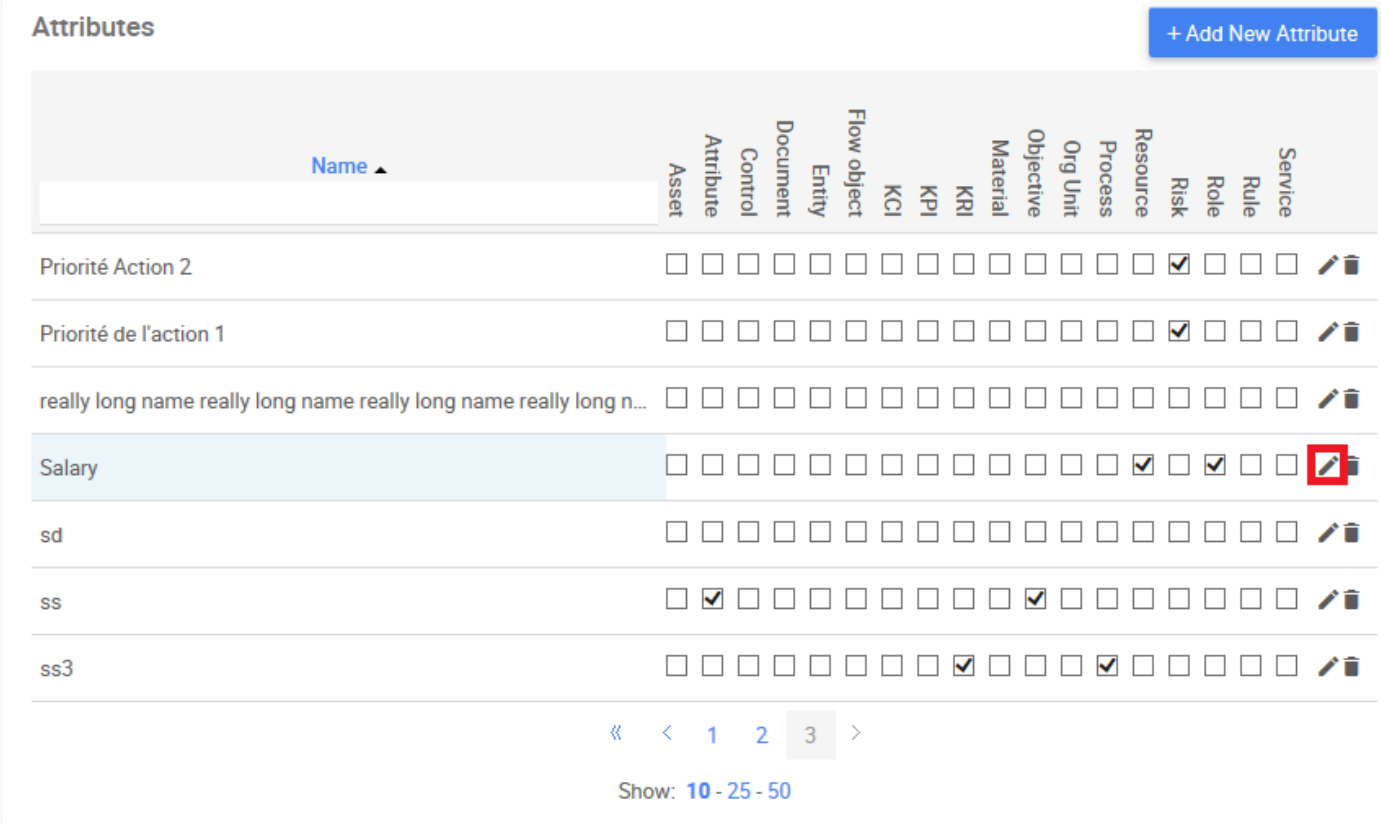


In line edits can also be performed to choose the object types applicable for the Attribute. Simply check the icons ☐ ☑ for the Object Type you desire to add or remove to or from the attribute.



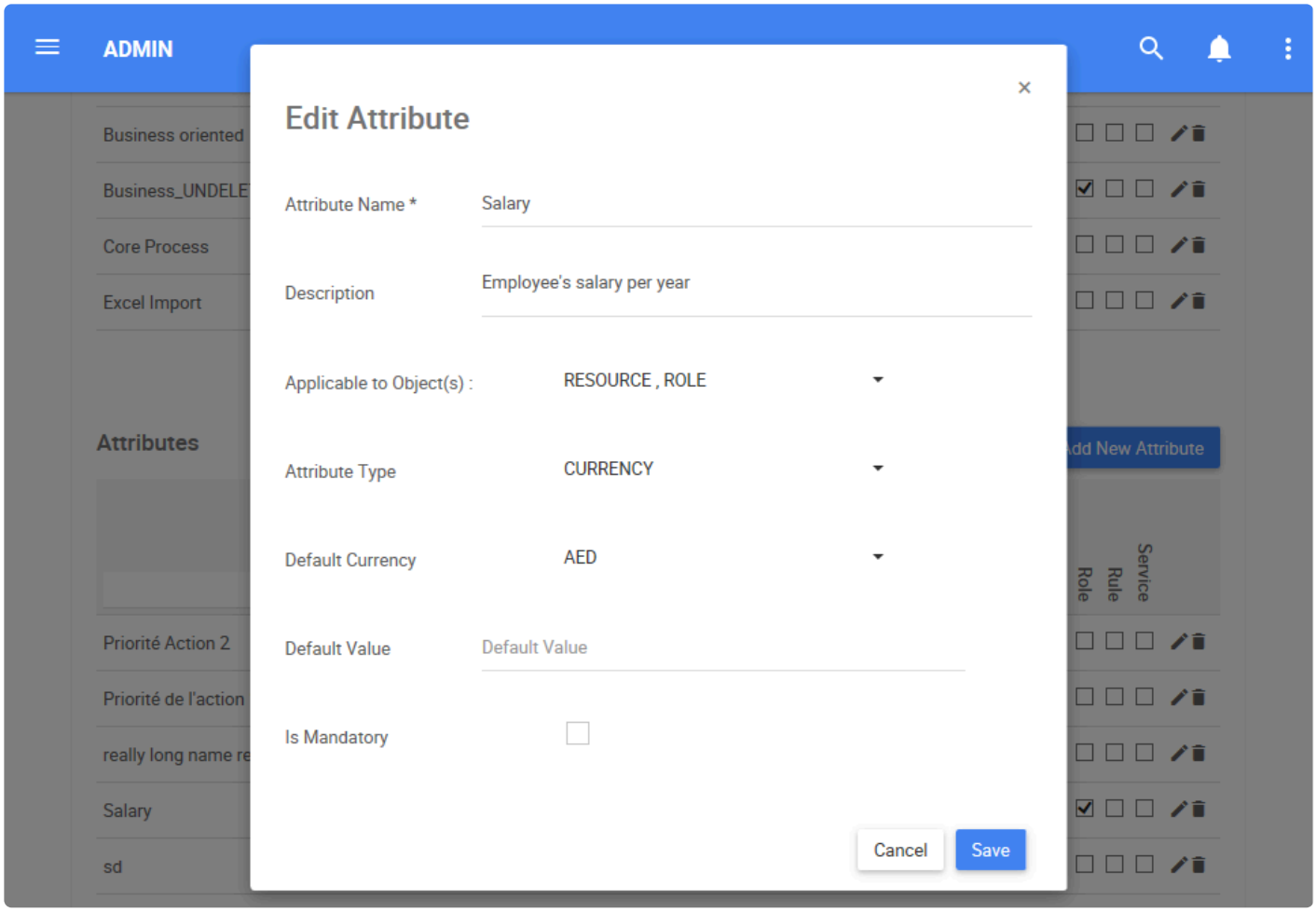
Editing Window

1. For further editing capabilities, navigate the cursor and select the icon featured on the right hand-side of each Attribute



2. Selecting this item will re-open the full user editing page. System Administrators can edit the Attribute and save.

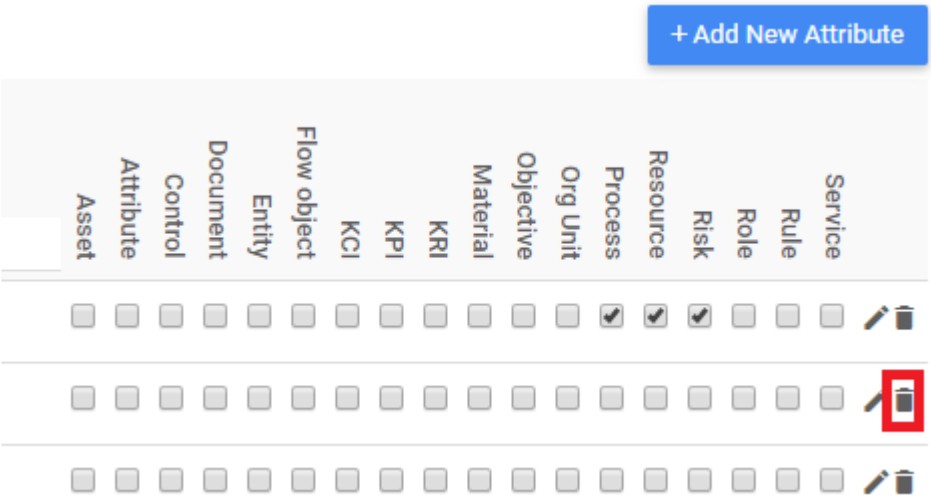
> Everything is editable when editing an attribute, except the Attribute Type: EPC blocks the drop-down list.


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
Business oriented
Business_UNDELE
Core Process
Excel Import
Attributes
Add New Attribute
Role
Rule
Service
Priorité Action 2
Priorité de l'action
really long name re
Salary
sd

10.8.4.3 Delete Attribute

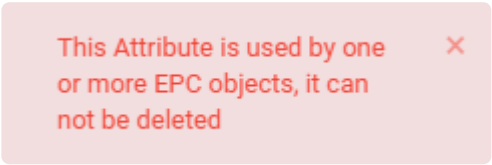
How to delete Attributes

1. Navigate the cursor and select the icon for the Attribute you want to delete



2. The following box will appear and you will be able to delete the Attribute by clicking on the “Delete” box

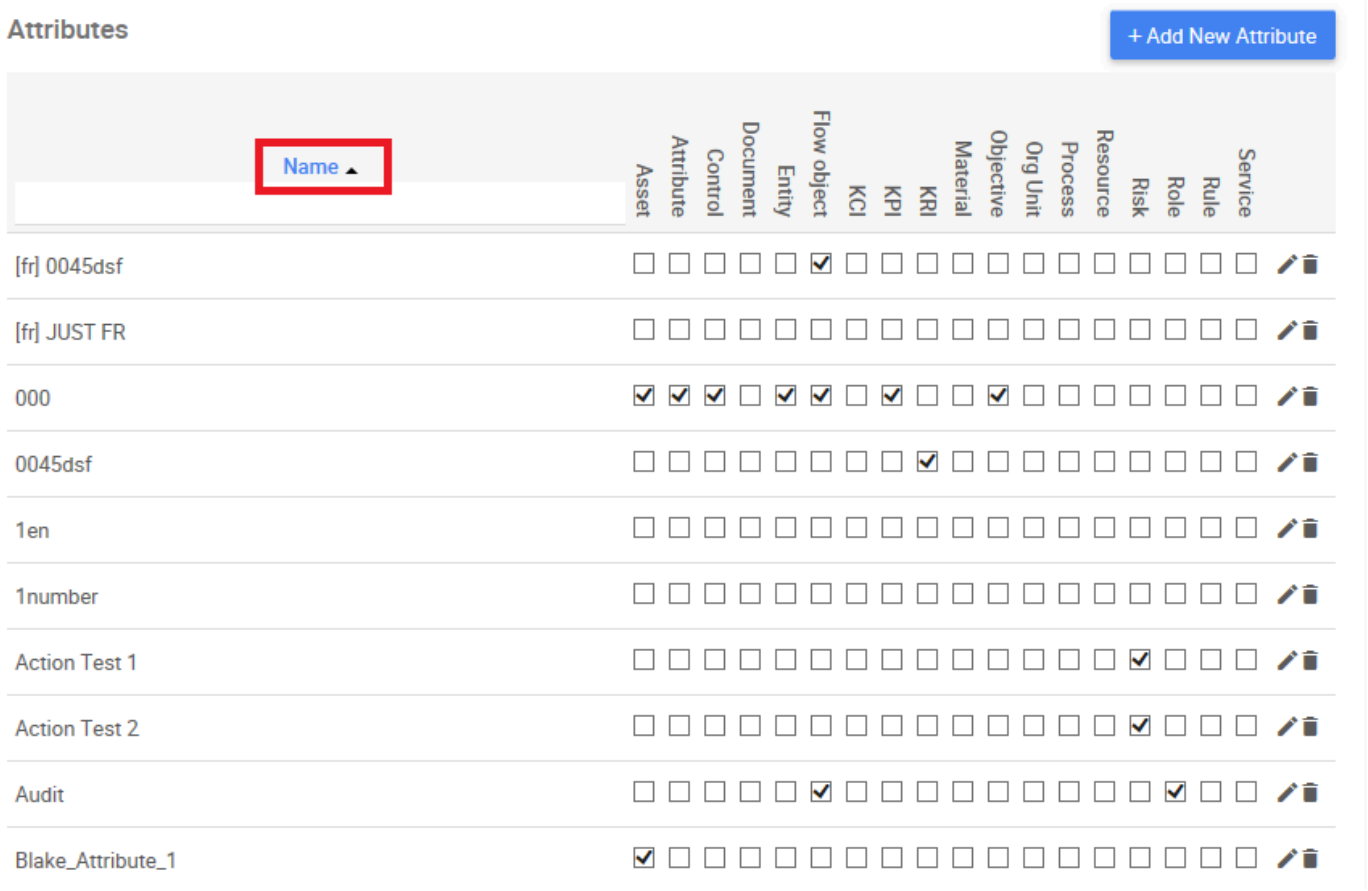
3. If the Attribute is being used by objects, you won’t be aloud to delete it, and you will see the following error message:



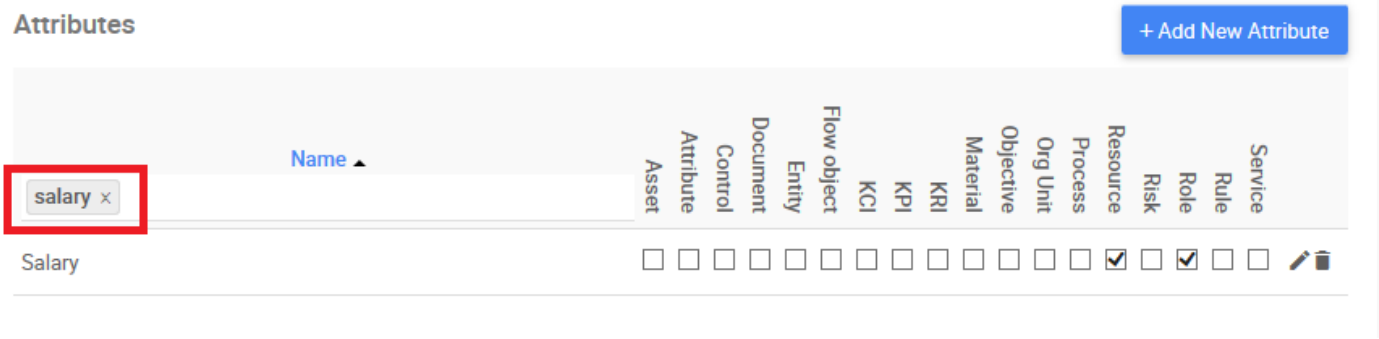
10.8.4.4 Search for Attributes

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.



- 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

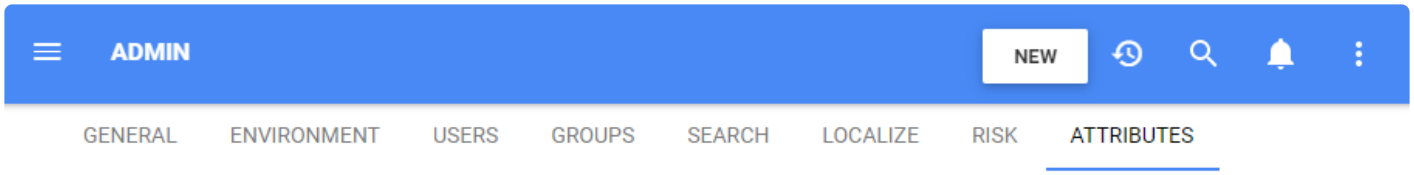


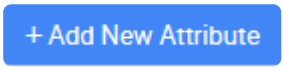
10.8.4.1 Add Attribute

How to Add an Attribute

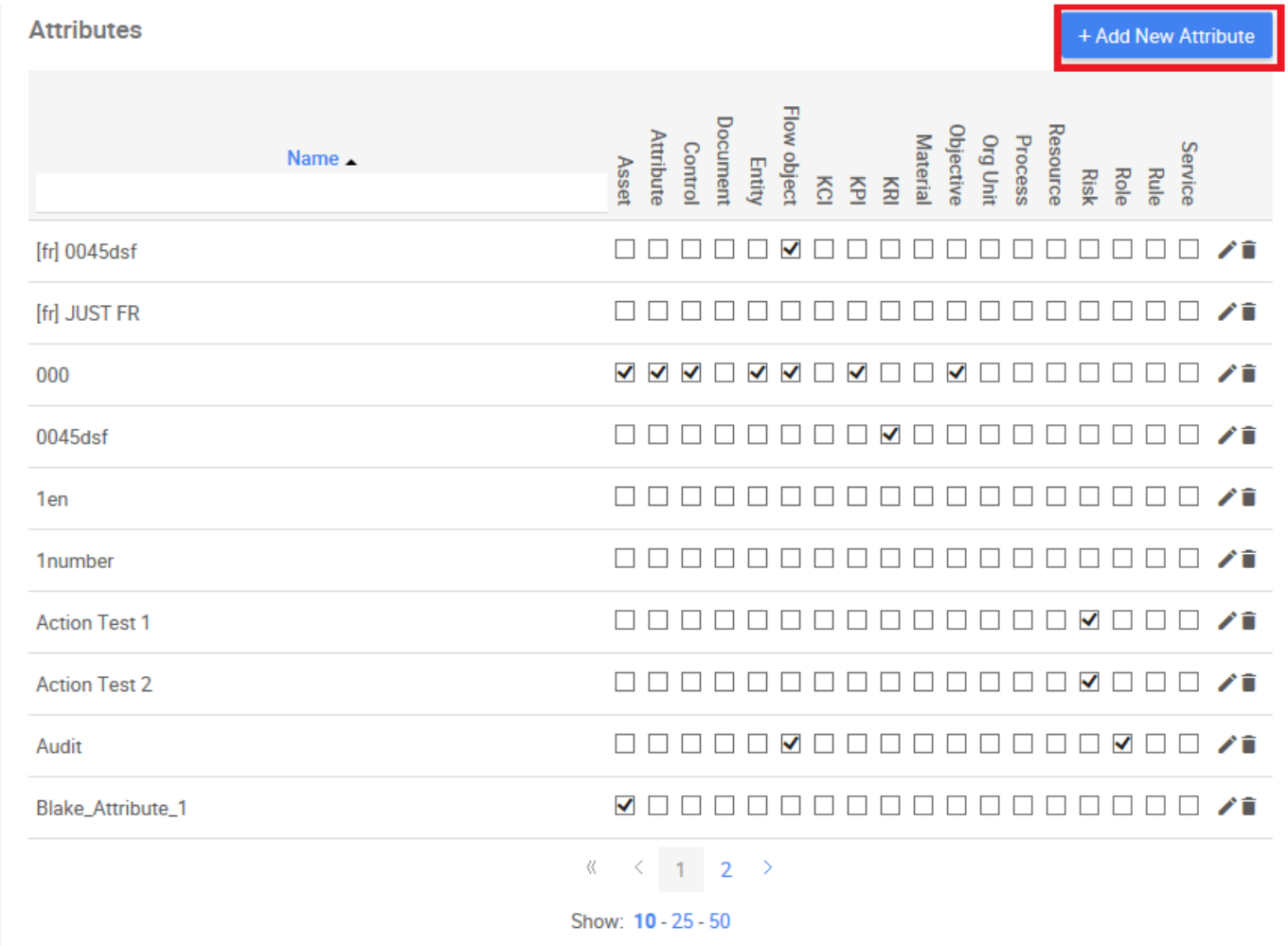
1. Navigate to the System Admin Section

2. Select the Attributes tab under the System Admin section



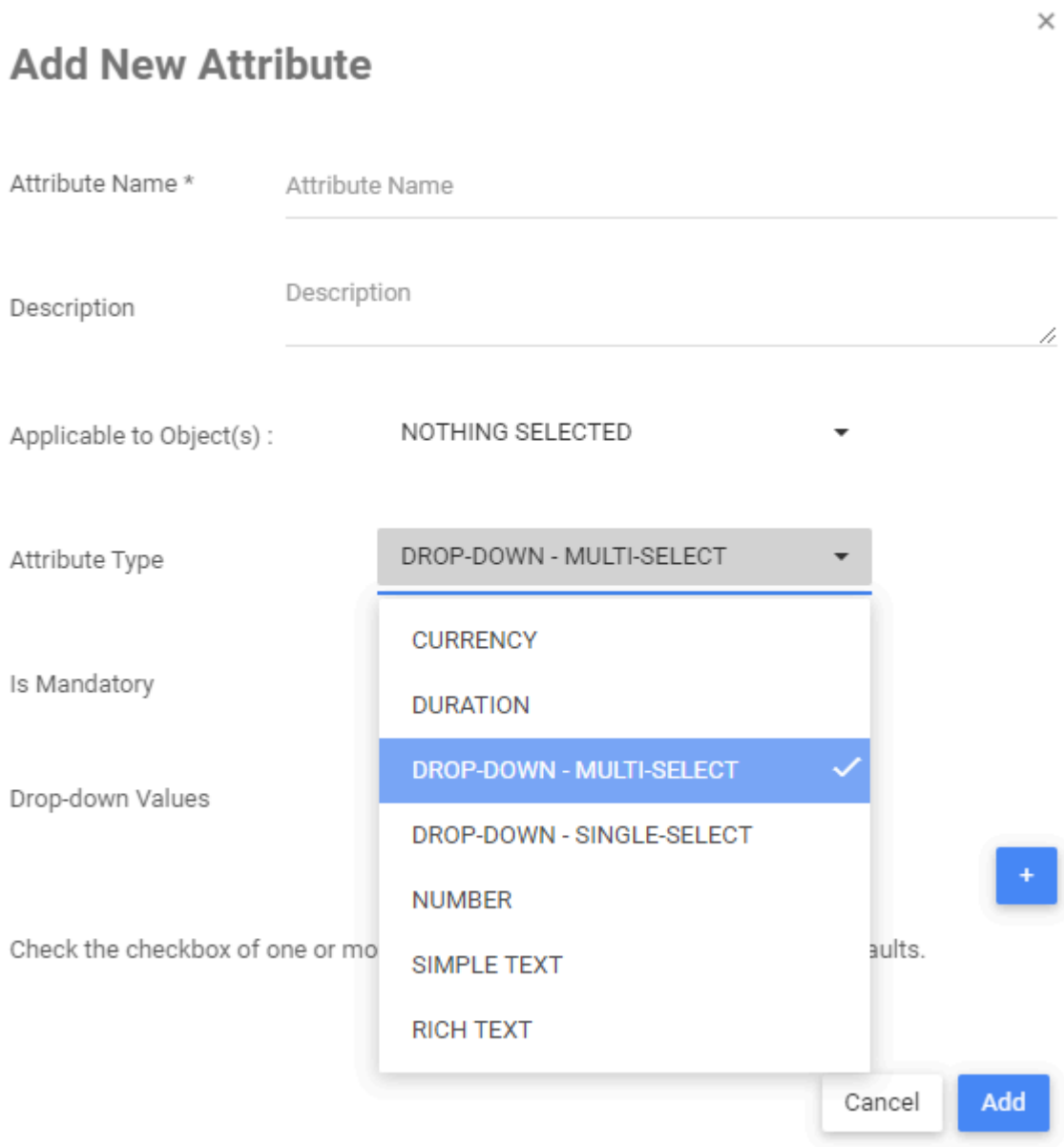
3. To add a new Attribute, select the 

button

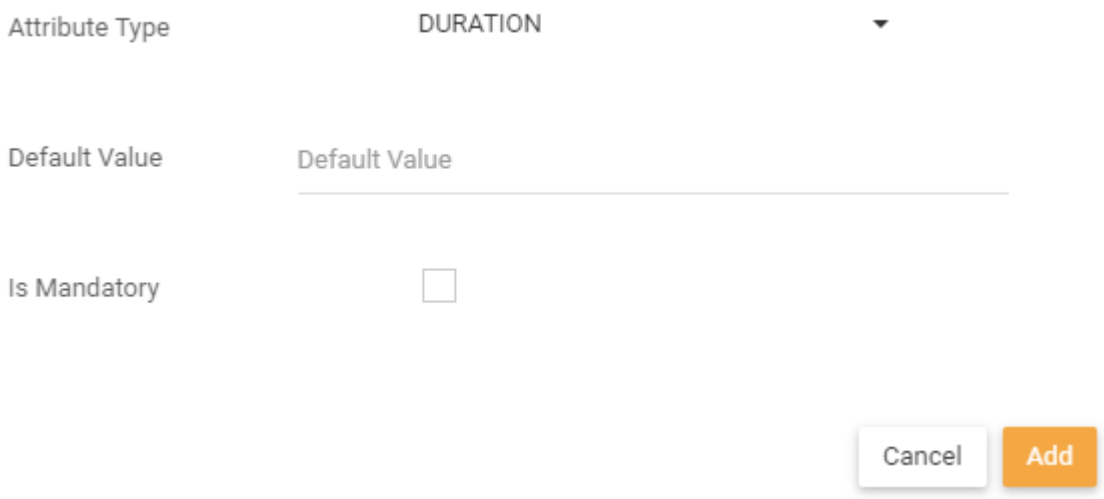


4. This will create a pop-up window allowing System Admins to fill in the appropriate information. These information to fill depend on the “Attribute Type” selected. The “Attribute Type” selected by default is “Drop-

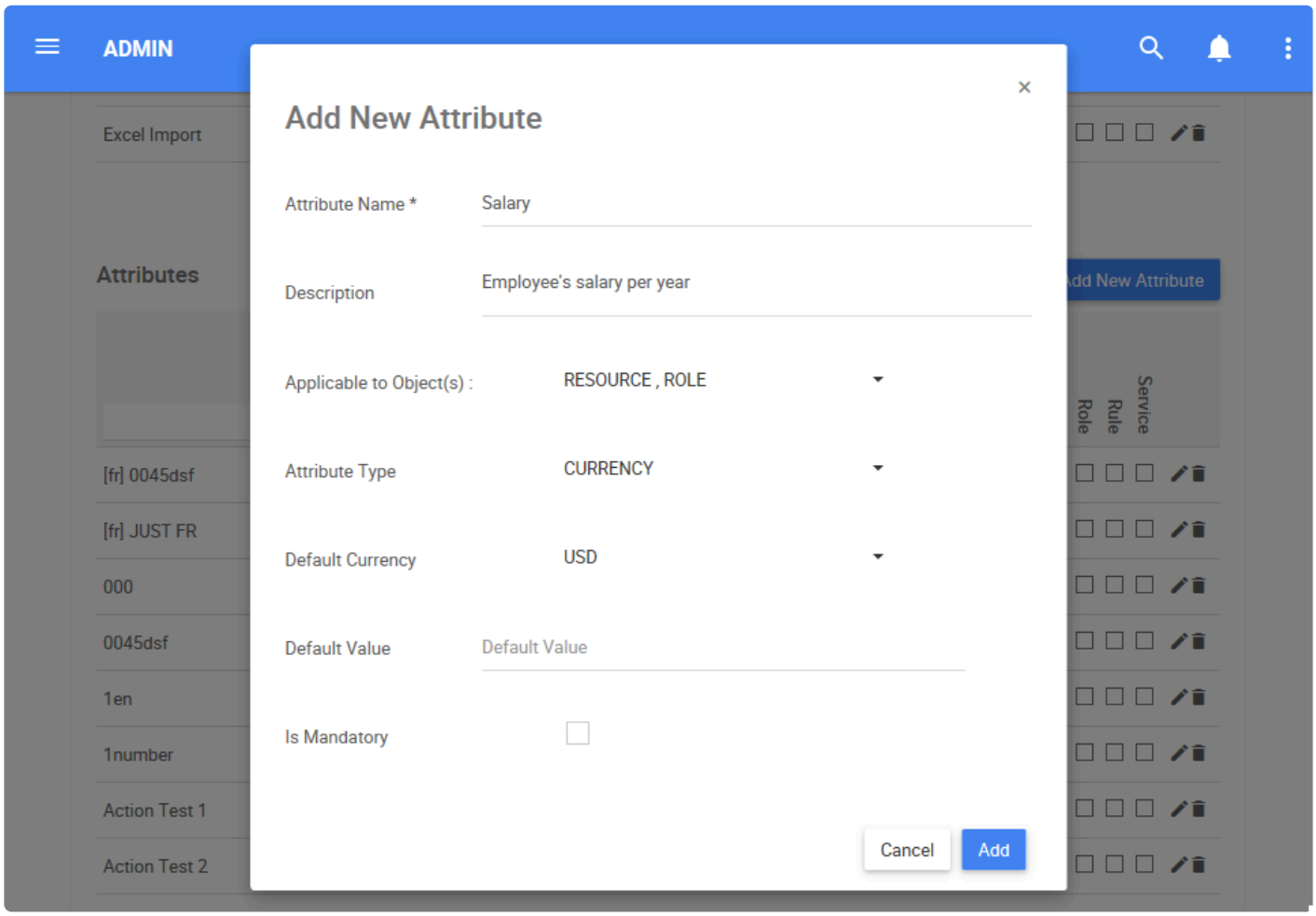
Down – Multi-Select”.



- For **Duration**, **Number** and **Text**, the information to add is the Default Value, and check the checkbox “Is Mandatory” to make the field mandatory for the users. The selection of one of these Attribute Types depends on the content of the Default Value.

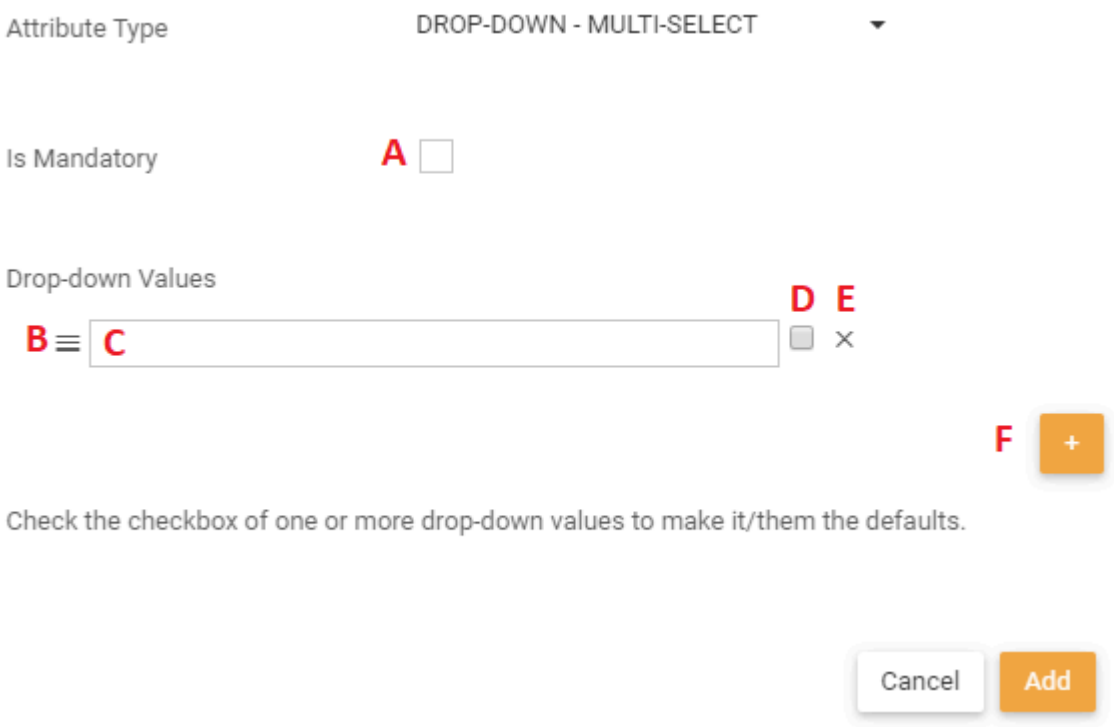


- For **Currency**, the information is the same as the one for Duration/Number/Text, but with the addition of the option to select the "Default Currency". In the example below example, the name of the Attribute is "Salary," it is applicable to the objects "Role, Resource," and it's an USD currency.



- For **Drop-Down – Multi-Select** and **Drop-Down – Single Select**, the information includes (see image below):

A- The option to make the attribute mandatory
B- The option to reorder the different values by clicking, dragging and dropping.
C- The field to write the possible values of the attribute
D- The option to select one default value (for single and multi-select), or multiple default values (for multi-select)
E- The option to remove a value
F- The “+” button to add more values



For all Attribute Types, there is the option to select to which objects the attribute is applicable to, by selecting them in the “Applicable to Object(s)” drop-down list.

5. After inputting the appropriate information, select the Add button and the Attribute will be added to the EPC.

10.8.5 Assignment Type

In EPC, an instance of assignment type represents a specific description between two business object (such as an association between a Process object and a Document object).

In order to better define these relationship between objects, EPC now provides analysts with the capability to declare for each relationship a type and its justification.

An Assignment type and Justification contains the following information:

- A name to describe the relationship. (required)
- A simple text file to further describe in detail (optional)

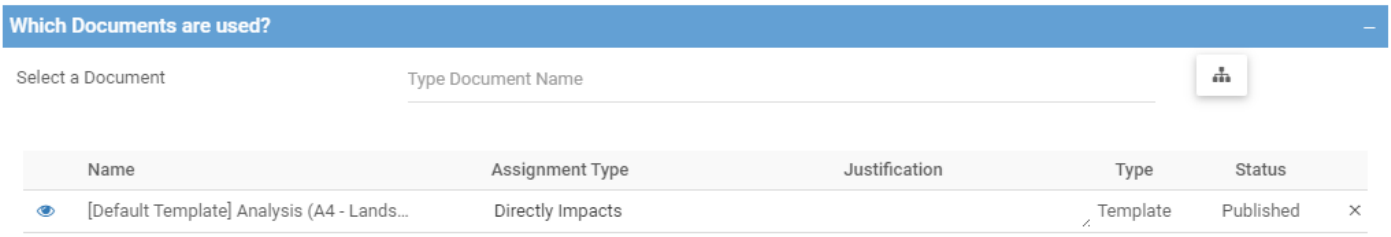
Creating, updating and maintaining the assignment types are the responsibility of the system admins.

To learn more of these tasks, please click below

1. Create and Add new Assignment Type
2. Edit existing Assignment
3. Delete Assignment

How do I use the assignment type field?

Once your users is in the edit details form of a business object, they can choose to associate different EPC to one another. Once they've selected an object, a table will display the name, the **assignment type**, the **justification** and the remaining fields. The cell corresponding to the assignment type and the associated object will display **Directly Impacts** by default. Afterwards your users can select a broad range of default system values or use the custom assignment types to categorize them.



System default assignment type

Directly Impacts – Does this object directly impacts the associated object ?
Indirectly Impacted by – Is this object indirectly impacted by the associated object?
Indirectly Impact – Does this object indirectly impacts the associated object?
Replaces – Does this object replace the associated object
Dependent on – Is this object dependent on the associated object?

Used by – Is this object used by the associated object?
Relates to – Is this object related to the associated object?
Precede – Does this object precedes the associated object?

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.
DISABLE_NOTIFICATION_MINOR_VERSION	If set to true, Users either Subscribed or Associated to the object (through roles/resources tied to the object's RACI) will not receive notifications or confirmation requests for Publications of MINOR versions

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.

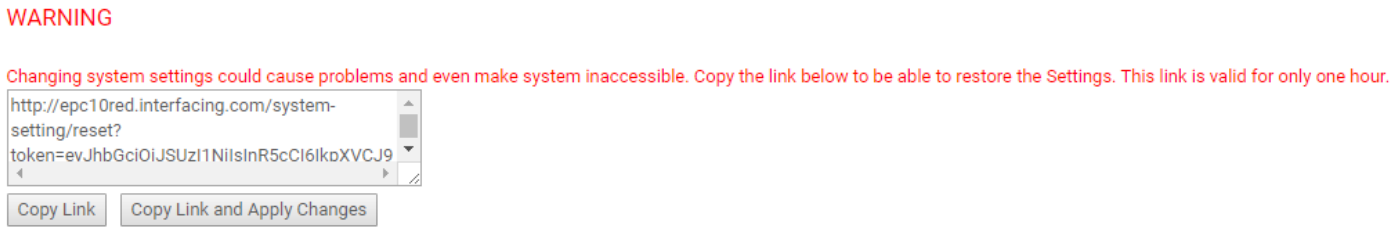
Use this formula to ensure safe use of search settings:
(SEARCH_FETCH_DELAY_BETWEEN_PAGES * SEARCH_FETCH_ITEM_PER_PAGE * SEARCH_MAX_FILE_SIZE) <= (0.5 * Allocated Search docker RAM)

> If a System Admin is unclear about the setting, it is recommended to leave the current setting. Erroneous editing of the settings could cause system malfunctions leading to down time. For further question, please contact your technical support team.

The EPC Web App provides a “Safety URL” for System Admins. This URL, if entered into the users selected web browser, reverts the EPC Web App to its initial settings. In order to apply any changes to the settings,

users will be required to copy this link.

The warning, located at the top of the page is displayed as follows:



10.9.1 Edit Settings

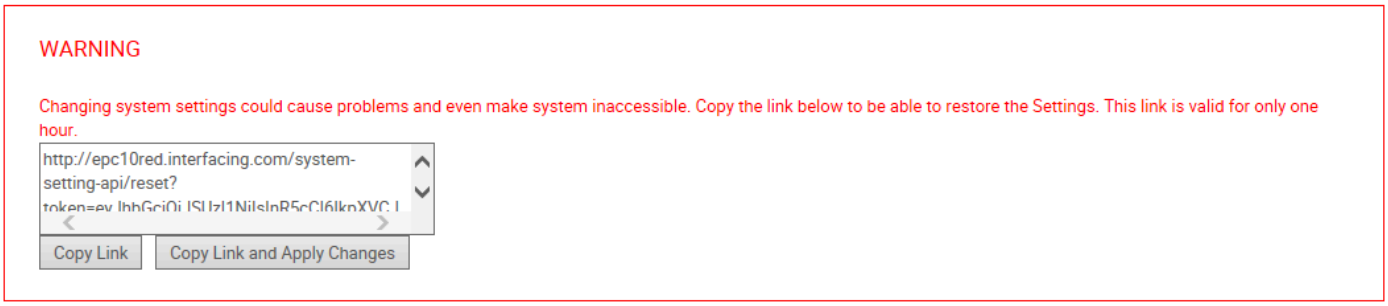
A System Admin can edit the system settings. Editing these settings requires system expertise.

For further details of system edits, please see the steps below:

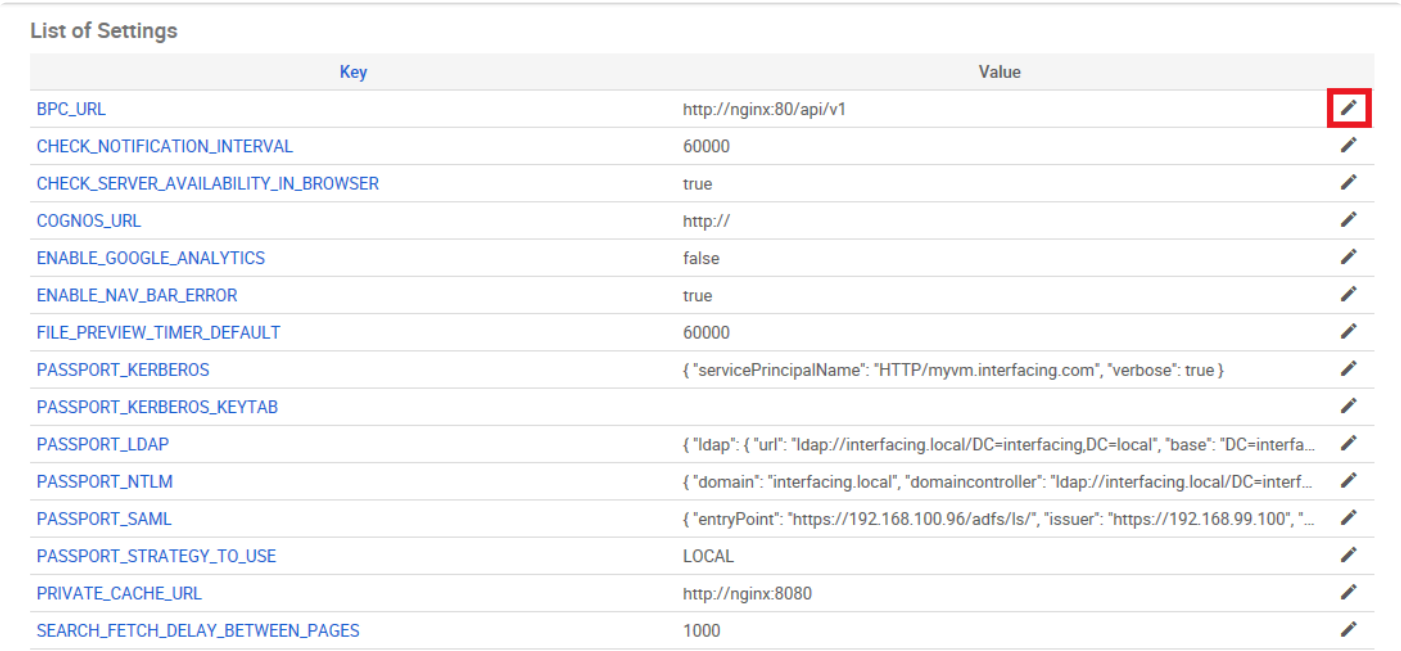
1. Navigate to the “System Admin” section of the EPC

2. Navigate to the “Advanced” tab

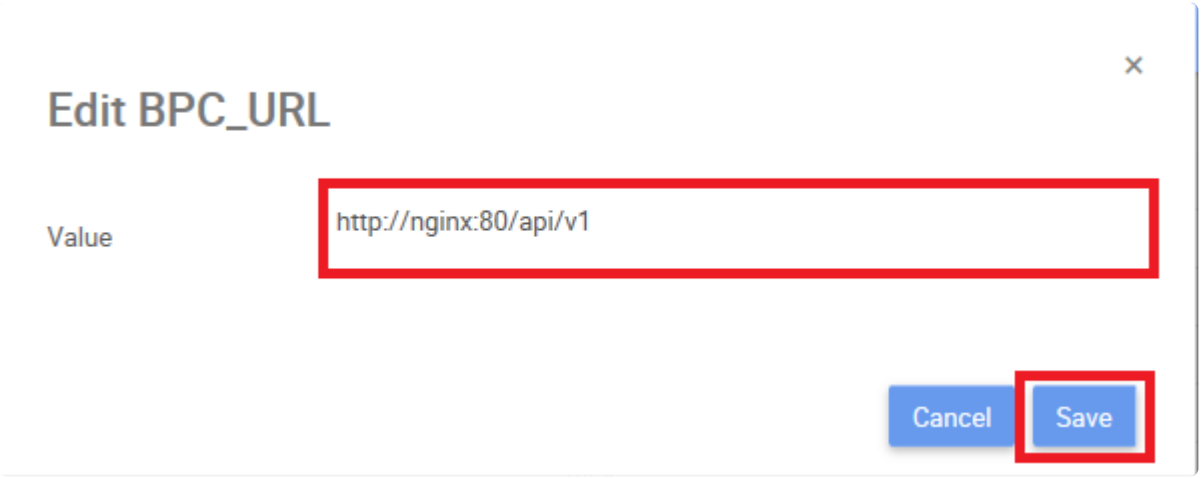
3. The first box displayed is a warning for the System Admin letting him now how changing the system settings could cause problems and even make the system inaccessible. A link to restore the settings is given valid for an hour.



4. Select the Setting you would like to edit by selection the icon



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



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.

10.9.1.1 Edit EPC Menu

In the Advanced tab of the the System Admin menu, Admins are able to create & modify:

- Home Pages on the EPC Menu
- Links on the EPC Menu

10.9.1.1.1 Add New Home Pages

System Admins can create & modify home pages. Creating additional home pages allow to separate widgets into separate tabs for easier management. Each EPC can have its own set of home pages.

To add a home page, navigate to the Advanced tab in the System Admin menu. Find the "HOMEPAGE_TABS" key and click on the icon to edit.

The format should be in JSON.

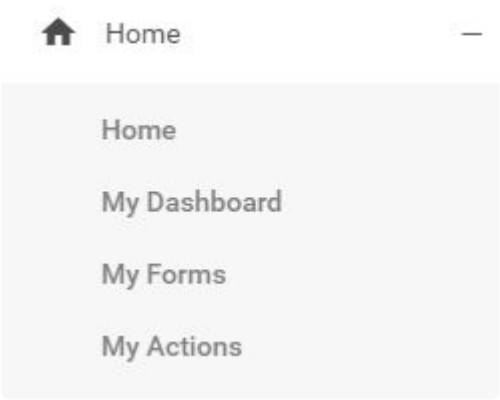
Objects, denoted between brackets { }, should include these attributes:

- "id" – The order in which the tab will appear in the menu
- "title" – The title of the home page

Objects and attributes should be separated by a comma (,). All objects must be contained within square brackets [ ]. See code below for an example.

```
[
   {
      "id":"1",
      "title":"Home"
   },
   {
      "id":"2",
      "title":"My Dashboard"
   },
   {
      "id":"3",
      "title":"My Forms"
   },
   {
      "id":"4",
      "title":"My Actions"
   }
]
```

The code above will result in this menu:



The tabs will also be shown at the top once the user is viewing a home page:

To delete a home page, simply delete the object contained in brackets { }.

! It is recommended not to delete the 3 default tabs; ie. the first 3 IDs.

10.9.1.1.2 Add App Links

Administrators are able to add external links to the Home Menu. This allows for users to quickly access any external applications or websites.

To add a new link, find the APPS_URL key in the advanced tab of the System Admin menu. Click on to edit the URLs.

The format should be in JSON.

Objects, denoted between brackets { }, should include these attributes:

- “url” – The URL of the target site or application
- “title” – The title displayed in the menu
- “icon” – The icon used next to the displayed name
- “children” – Optional, used to regroup elements together

Objects and attributes should be separated by a comma (,). All objects must be contained within square brackets [ ]. See code below for an example.

```
[
  {
    "url": "http://urlapplication.com/",
    "title": "APPS",
    "icon": "zmdi zmdi-apps",
    "children": [
      {
        "url": "http://www.cnn.com",
        "title": "CNN",
        "icon": "zmdi zmdi-yahoo"
      },
      {
        "url": "http://www.bbc.com",
        "title": "BBC",
        "icon": "zmdi zmdi-vimeo"
      }
    ]
  },
  {
    "url": "http://www.yahoo.com",
    "title": "Yahoo",
    "icon": "zmdi zmdi-yahoo"
  },
```

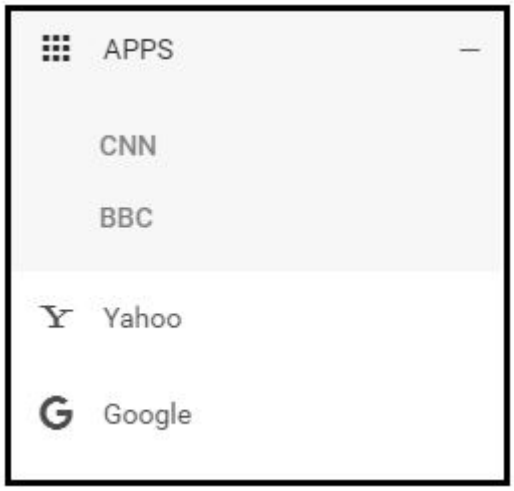
```
  {
    "url": "http://google.ca",
    "title": "Google",
    "icon": "zmdi zmdi-google"
  }
]
```

Note that BBC and CNN will be children under APPS

Available icons can be found at: http://zavoloklom.github.io/material-design-iconic-font/icons.html

To apply changes, you must click on “Copy Link and Apply Changes”

The code will result in this menu:



To delete a link, simply delete the entire object denoted in brackets { }.

10.9.1.2 Enable Flowchart Mapping

To enable the mapping using Flowchart shapes, change the key of ENABLE_FLOWCHART_STENCIL to “true”

ENABLE_FLOWCHART_STENCIL	true	

! Make sure you enter “true” or “false” exactly as provided. Entering other incorrect values might render the EPC unusable. If an error occurs, contact your administrator.

* If the flowchart setting is disabled in the System Admin settings, users will still be able to switch and see maps in flowchart. However, they will not be able to map using flowchart shapes. Any editing will be done in BPMN.

10.9.1.3 Data Association Harmonization

Within the advanced system settings, administrators are able to enable data association harmonization as well as setting the default harmonization value.

See (insert freeze section) for more information.

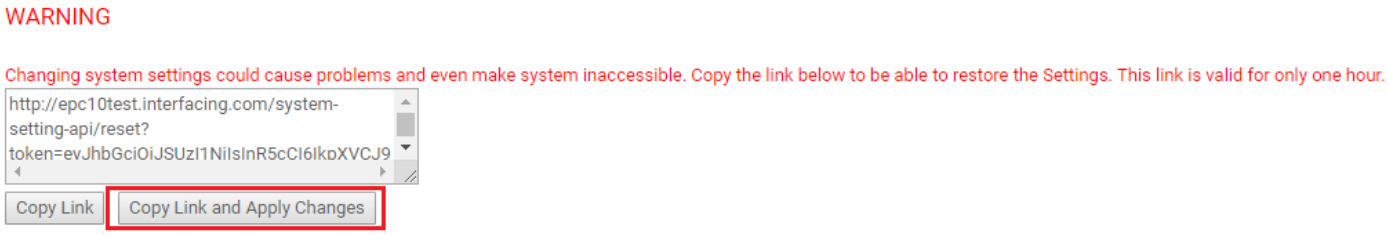
To Enable Data Association Harmonization

1. Find the key titled **ENABLE_HARMONIZATION**. To edit the key value, click on the pencil icon on the far right side.

2. Change the value to **true** to enable and **false** to disable the feature.

> ! Enabling or Disabling harmonization will not completely disable harmonization. New processes that are created after the key value has been changed will not have Harmonization options. Old processes that were set to High, Moderate or Low control will keep behaving as such.

3. Click on **Copy Link and Apply Changes** to save the settings



To Change the Default Harmonization Value

1. Find the key titled **HARMONIZATION_CONTROL_DEFAULT**. To edit the key value, click on the pencil icon on the far right side.

ENABLE_GOOGLE_ANALYTICS	false	
ENABLE_HARMONIZATION	true	
ENABLE_NAV_BAR_ERROR	false	
FILE_PREVIEW_MAX_FILE_SIZE	52428800	
FILE_PREVIEW_TIMER_DEFAULT	60000	
HARMONIZATION_CONTROL_DEFAULT	low	

2. Acceptable values for this key are:

- **low**: This is the EPC's default value. This value corresponds to "Low Control". Changes in association versions are always synced automatically for any major or minor publications.
- **moderate**: This value corresponds to "Moderate Control". Changes in association versions are only automatically synced for minor publications. Any major publications of an association will mark the subject designated as Moderate Control out of date.
- **high**: this value corresponds to "High Control". Changes in association versions are never automatically synced, whether for major or minor publications. Any publication of an association will mark the subject designated as High Control out of date.

> ! The default control value will only be inherited by new processes that are created after this key is changed. Old processes will not be affected by changing the value of this key.

3. Click on **Copy Link and Apply Changes** to save the settings

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://epc10test.interfacing.com/system-setting-api/reset?token=eyJhbGciOiJSUzI1NiIsInR5cCI6IkpXVCJ9

Copy Link | Copy Link and Apply Changes

10.9.1.4 Enable Cognito

To enable Cognito login for EPC webapp users, follow these steps:

1. In the advanced tab, find the key labelled **PASSPORT_STRATEGY_TO_USE**.

2. Click on the edit icon to edit the value. Change the value to **COGNITO**.

10.9.1.5 Session Timeout Settings

EPC gauges whether to keep a session open through the heartbeats that sessions emit. EPC checks for these heartbeats every X minutes, where X=SESSION_REFRESH. An EPC session starts giving heartbeats as soon as it is started and stops giving one when the user:

- Closes the tab or the browser in which EPC is opened
- Signs out from EPC
- Puts their PC to Sleep, Shuts it Down, or sets it to Hibernate mode.

From that point, EPC will notice within X minutes that the session isn't emitting a heartbeat anymore. As soon as it sees this, it will close the session after Y minutes, where Y=SESSION_TIMEOUT. Both of these variables can be modified by EPC System Administrators

1. Session Refresh time: how often EPC checks for a heartbeat. If EPC is still emitting one, it updates a table column named Last Active Time. If not still open, nothing happens. Upon opening of a new session, the Last Active Time column is populated with the login time. This is a routine program that runs on a predefined schedule independent of when a user logs in.
2. Session Timeout time: how long EPC must wait after the Last Active Time to close a session.

Warning: Do not set Session Refresh Time lower than 5, especially if your user base is large. While the refresh program is not heavy, it does add some extra load to the server, especially if it runs every few minutes.

Note: Identity Providers (e.g. Azure) cannot dictate whether your EPC session can stay open or not. It only keeps the session that allows you to connect to EPC open. For more information, please contact support@interfacing.com.

Here are a few scenarios to help explain.

Scenarios:

- If Session Timeout Time < Session Refresh time: every session will always close (regardless of whether you are active in EPC or not) at the Session Timeout time.

e.g.
Session Timeout Time: 60
Session Refresh Time: 65
You log in at 12PM + The Session refresh runs at 1205PM = your session closes (and thereby kicks you out) at 1PM regardless if you are in EPC or not.

- If Session Timeout Time > Session Refresh Time: the session will only ever close a certain amount of time after you close your tab or browser
  e.g. Session Timeout time: 60 Session Timeout Time: 55
  You log in at 12PM +The Session Refresh timer passes at 12:30PM + You close your browser at 12:35PM = Your session closes at 1:30PM because your Last Active Time was recorded (when the Refresh timer ran) as 12:30PM. So exactly at 1:30PM your session is closed.

10.10 Home Page Widgets

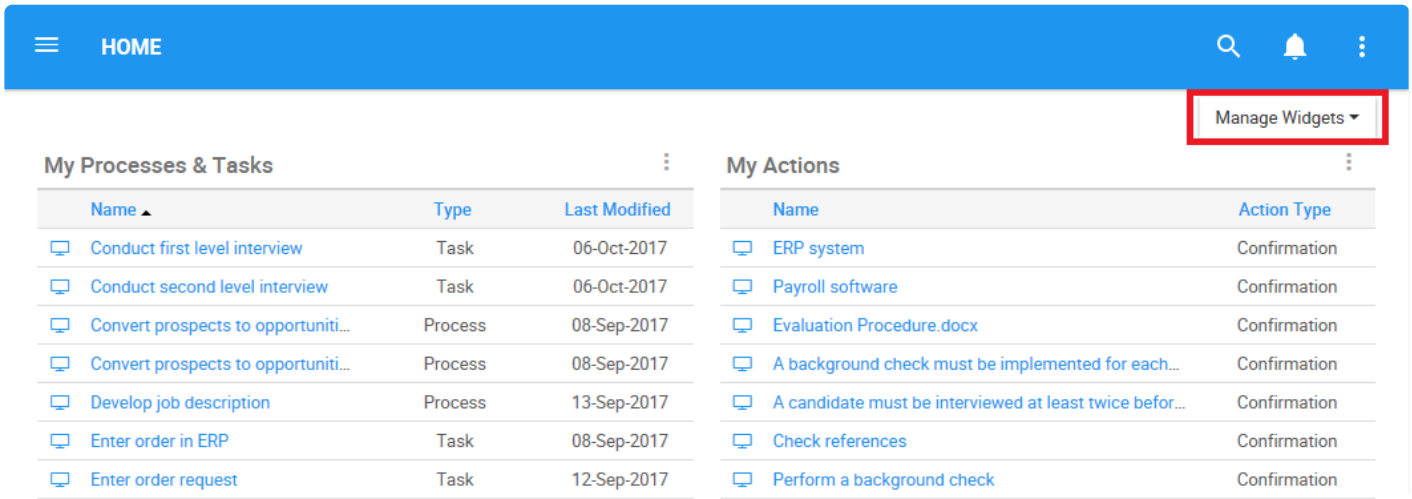
System Admins have control over default settings for their specific system. Setting defaults allows System Admins to create templates for the users to optimize their use of the EPC.

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.

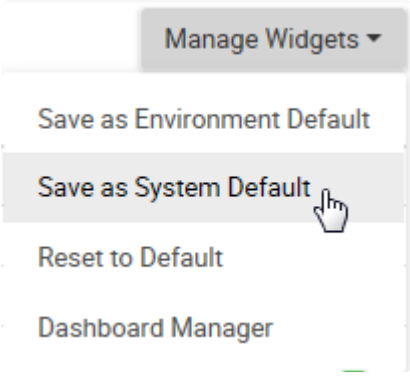
To Set a Home Page Widget Layout as a default layout, please see the steps below:

1. Log into the EPC

2. Navigate to the Home page and select the Manage Widgets icon



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.

10.11 Graph

System Admin can upload custom flowchart images for their specific system. The GRAPH tab allows System Admins to create and upload SVG images of flowcharts and provides a new level of customization to modeler in order to create BPMN 2.0 process flows.

System Admins can select the custom flowchart option for system users. Changing the custom flowchart elements tallow system admins to control the flowchart settings of users graph editing page.

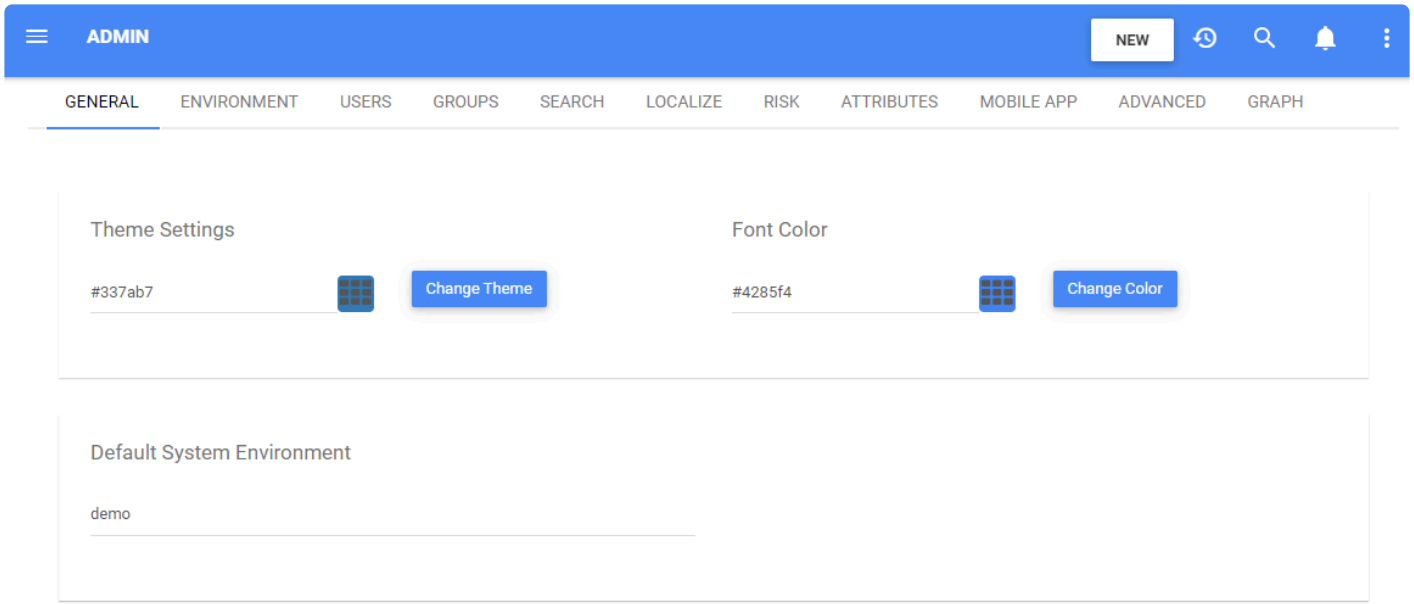
Uploaded files must be in SVG format and individually no larger than 1 MB.

The following elements can be customized:
• Start event
• End event
• Intermediate event
• Gateway event
• Task event
• Subprocess event
• Annotation events

Custom graphics are tied to the system setting to which they are uploaded—if you have multiple environment, then all the environments will have the new custom graphics.

To Set a Custom Flow Image for Object Type, please see the step below:

1. Log into the EPC and navigate to **Graph** Tab and view the current custom flow chart images



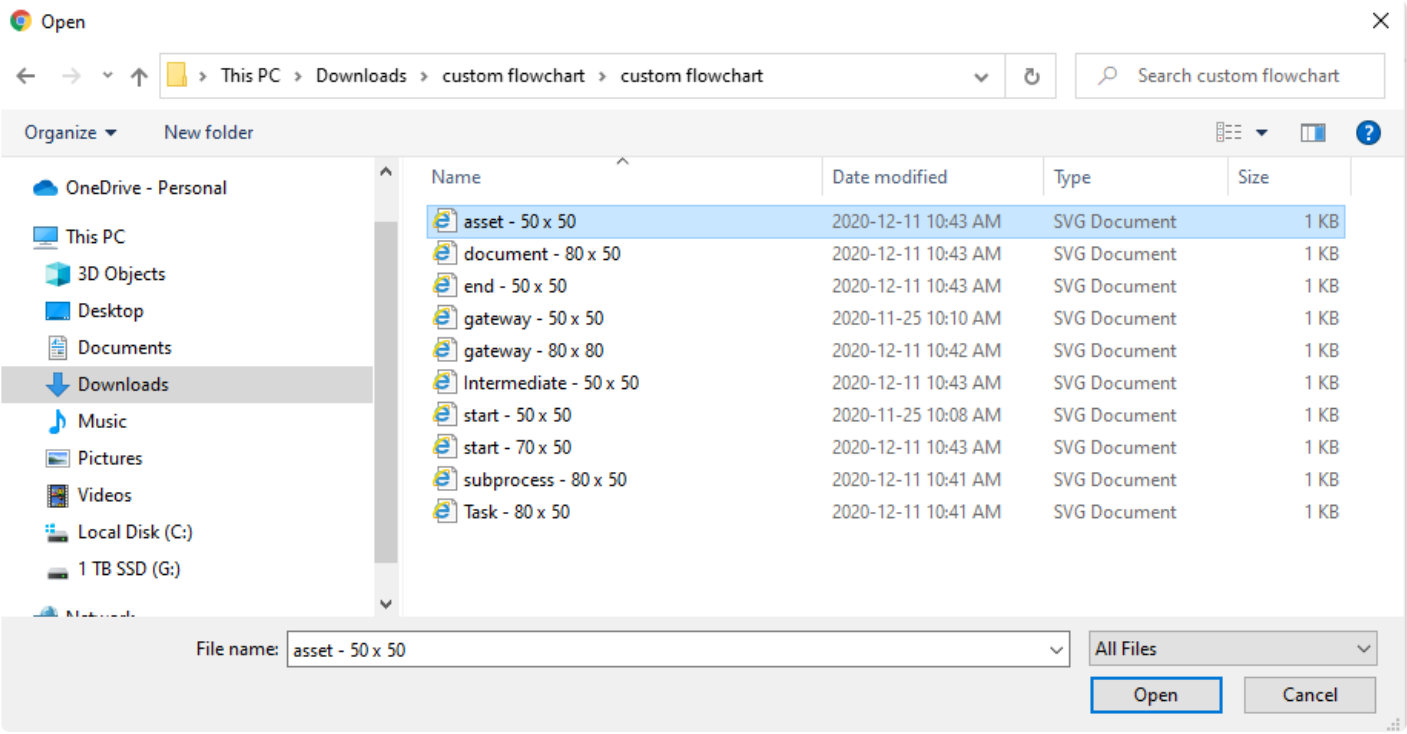
2. Click on the “Choose File”

Custom Flow Object:

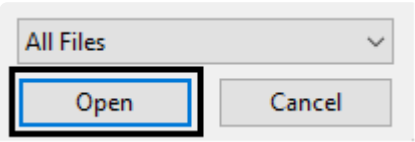
Document:	Choose File No file chosen	preferred size: 80 x 50pixels	
Asset:	Choose File No file chosen	preferred size: 50 x 50pixels	
End:	Choose File No file chosen	preferred size: 50 x 50pixels	
Gateway:	Choose File No file chosen	preferred size: 50 x 50pixels	
Intermediate:	Choose File No file chosen	preferred size: 50 x 50pixels	
Start:	Choose File No file chosen	preferred size: 50 x 50pixels	
Subprocess:	Choose File No file chosen	preferred size: 80 x 50pixels	
Process:	Choose File No file chosen	preferred size: 80 x 50pixels	

Upload

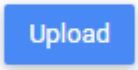
3. Locate & choose an image from your File Directory



4. Click on Open and the image is stored in your local storage



5. FInally, click on the “Upload” button

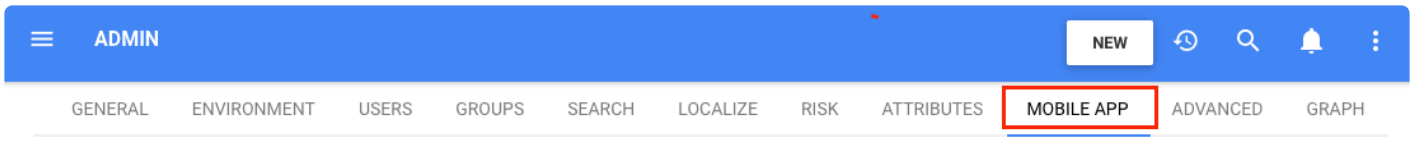


To view and use the custom flow chart, have *Custom Flowchart *enabled in the map option menu

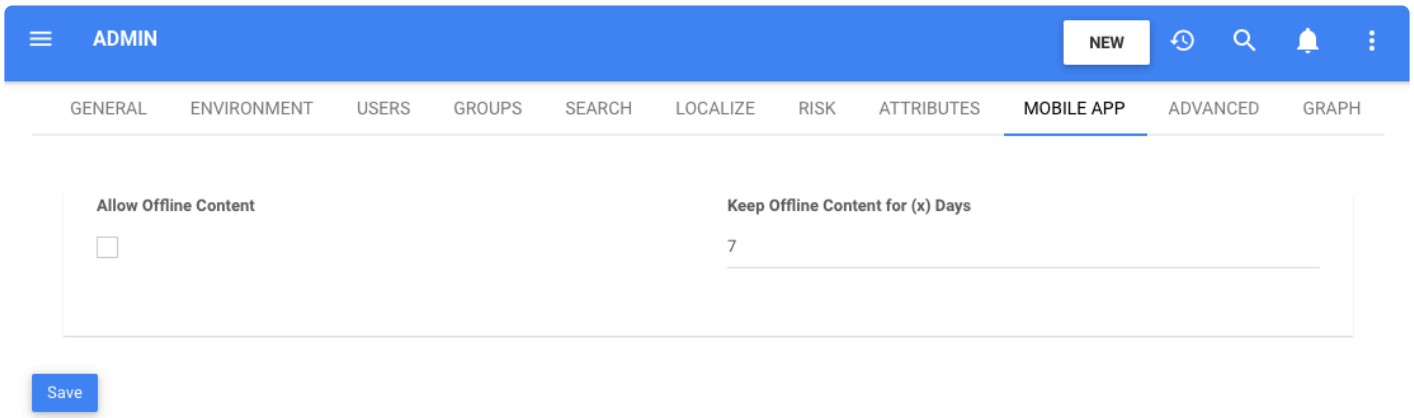
10.12 Mobile App

Users that are system admins can now configure the time period during which the offline content is saved.

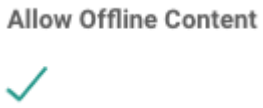
To do so, navigate to the ‘‘**Mobile App**’‘ tab.



You’ll be greeted with this page:

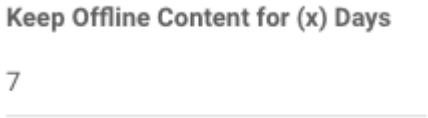


Select the box under ‘‘**Allow Offline Content**’‘ to make the content available offline. When selected, a green arrow will appear.

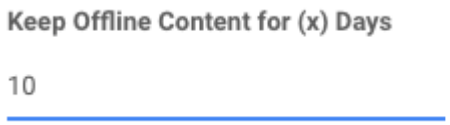


You can then navigate to ‘‘**Keep offline Content for (x) Days**’‘. With this setting, you can decide for how many days the content is available offline from last update.

> The Default amount of days will be 7.



You have the liberty to change the number of days the content will stay available online by clicking on the ‘‘7’‘ and typing your preferred number.



11.0 Icons and Glossary

The following sections are provided to help users understand the content of the EPC, user manuals and excercises.

1. Web App Icons
2. Key Terms

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
	Last Visited
	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 • Impact • Map • Hierarchy
	• Performance Overview

11.1.2 In-Graph Icons

Icon	Item
	Roles
	Assets
	Documents
	Resources
	Org Units
	Risks
	Rules
	Controls
	Objectives
	Entities
	Attributes
	KCI
	KPI
	KRI
	Materials
	IPL
	Categories

© 2020 Interfacing Technologies Corporation

	Annotations
	Event & Gateway Name
	Source Process/Flow Object
	Localized Process/Flow Object
	Reference

11.1.3 Toolbar Icons

Icon	Item
or	Fit Screen
or	Full Screen
	Zoom In
	Zoom Out
	Options
	Auto Layout
	Print
	• Unsubscribed • Subscribed
	Node Color
	Document Generation
	Undo
	Redo
	Copy
	Paste
	Cut

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 vale within an organization

Responsible: A component of the RASCI-VS Matrix denominating someone who is the primary party in charge of an object within the Web App

Risk : An area of vulnerability and/or concern regarding a business' ability to perform necessary activities

Roles : Specific jobs or business functions that individuals (resources) are responsible for performing

Reference: A tool allowing you to re-use existing processes in your EPC. This allows you to create a linked copy of a process, relocate it, and customize it as needed.

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

12.0 Editing on the Web App

The Edit functionality allows Web Modelers, with right and access, to map processes, and to create and edit objects on the Web App.

Editing on the Web App includes a section about the general editing on the Web App, as well as a section to edit each module of the EPC:

1. General Edit
2. Process Edit
3. Performance Edit
4. Organization Edit
5. Documents Edit
6. Risk Edit
7. Control Edit
8. Rule Edit
9. Collaboration Edit

12.1 General Edit

Web Modelers can create and edit objects on the EPC Web App.

The General Edit section will cover the following general topics:

1. WebApp Editing Rules
2. Create
3. Edit Toolbar
4. Import/Export Content
5. Associations
6. Properties

12.1.1 WebApp Editing Rules

When editing on the Web App, some rules apply.

This section will cover the WebApp Editing Rules:

1. Who can edit on the WebApp?
2. Web Edit Vs. Modeler
3. Editing Language

12.1.1.1 Who Can Edit on the WebApp?

Who can edit objects?

In order to Edit on the WebApp, a user must have:

- “Modeler Access”
- Their profile’s “Displayed Content” must be in “Show Latest”. This can be achieved 2 ways, which are explained in the Displayed Content page.

The System Administrator controls permissions for users and can therefore grant “Modeler Access” to users.

To know which authorizations have been granted to you as a user, please read the Authorizations Section in your user profile.

What objects can they create and edit?

Users who are Editors require **Write** permissions or better on:

- The parent object to create a child object
- The specific object when editing

See the security section for more details on how EPC security works.

12.1.1.2 Web Edit Vs. Modeler

Modelers can either map on the Modeler or on the Web Edit. System Administrators are responsible for setting which Editing Tool the Modeler will use.

> ! It is important to know that Modelers **cannot use** both of the editing tools.

> ! A modeler can map on the Modeler and then switch to the Web Edit and the content will be transferred. However, the other way around does not work. If a modeler maps on the Web Edit and then switches to the Modeler, the content will **not** be transferred.

How to set the Editing Tool

Systems Administrators set the Editing Tool on the Advanced tab of the Admin section. They need to edit the key named named “EDITING_TOOL” by typing on the value box either “MODELER” or “WEB.” It is important to know it is case sensitive and needs to be written in capital letters.

For step-by-step instructions on how to edit the settings for the Advanced section, please click here.

12.1.1.3 Editing Language

Web Modelers can input content data about EPC objects in different languages. Editing the language of EPC objects is done through the Edit Details window of an object.

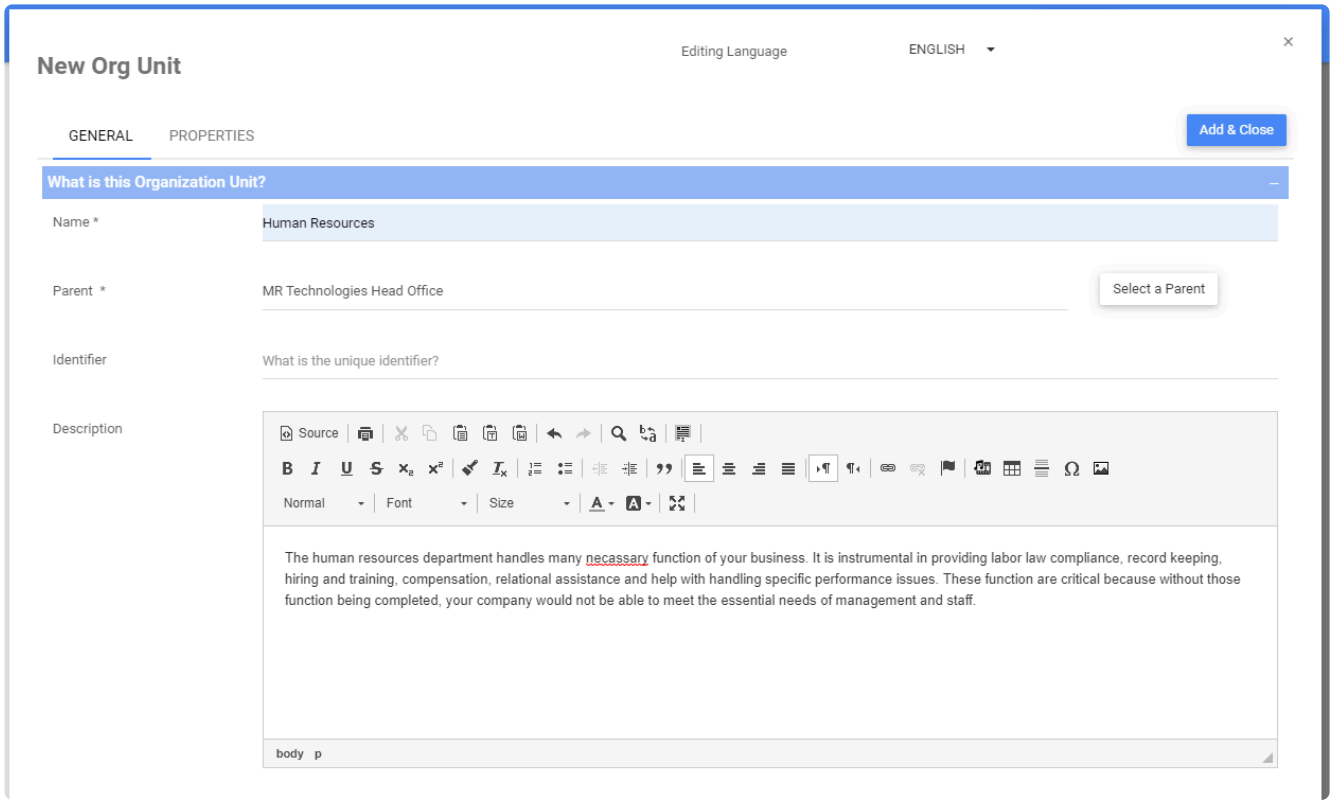
This enables EPC end users to display the content in the language they prefer. To learn how to define language preferences for your profile, click here.

For further information, navigate to the Understand Content Language section.

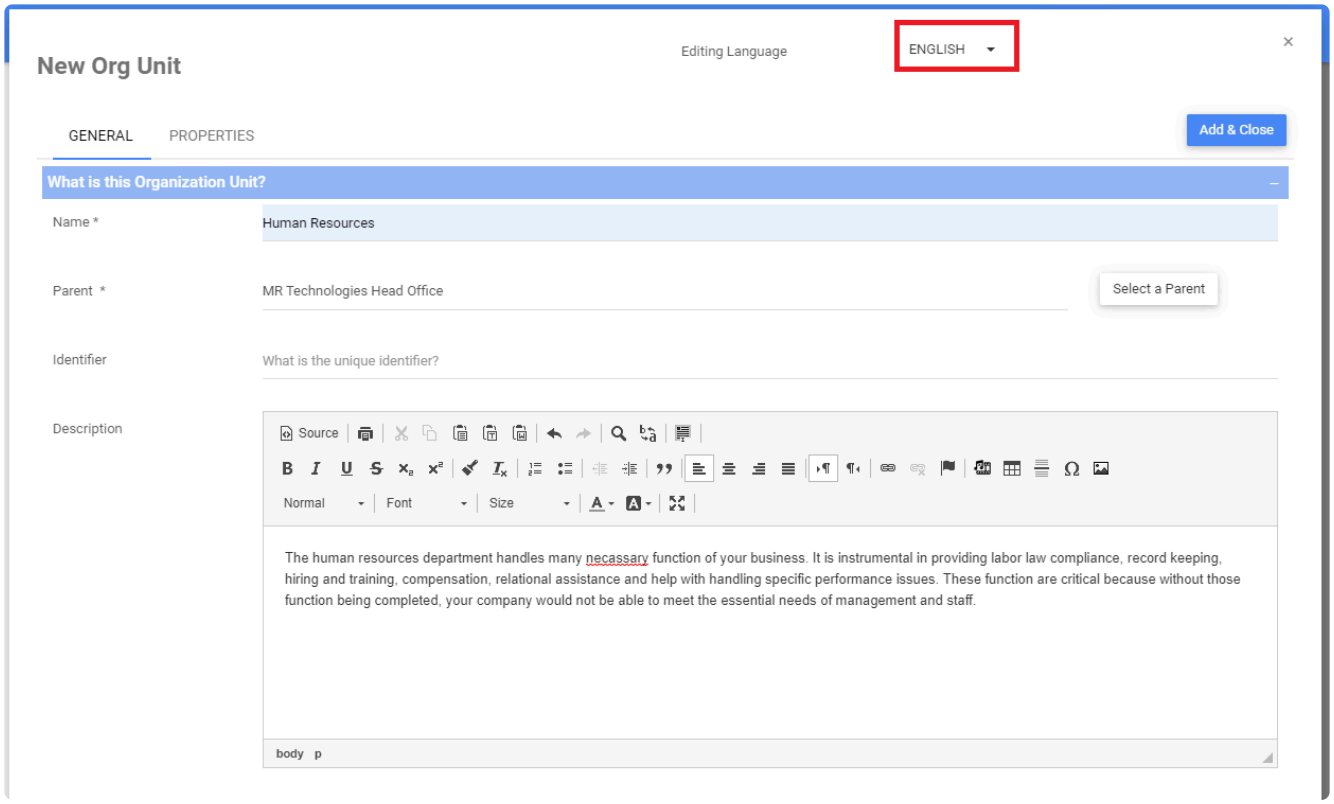
> Changing content language requires EPC's multilingual license

To Edit the language of an EPC object, follow these instructions

1. Navigate to the Edit Details window using the Edit button. In this example, an Organization Unit

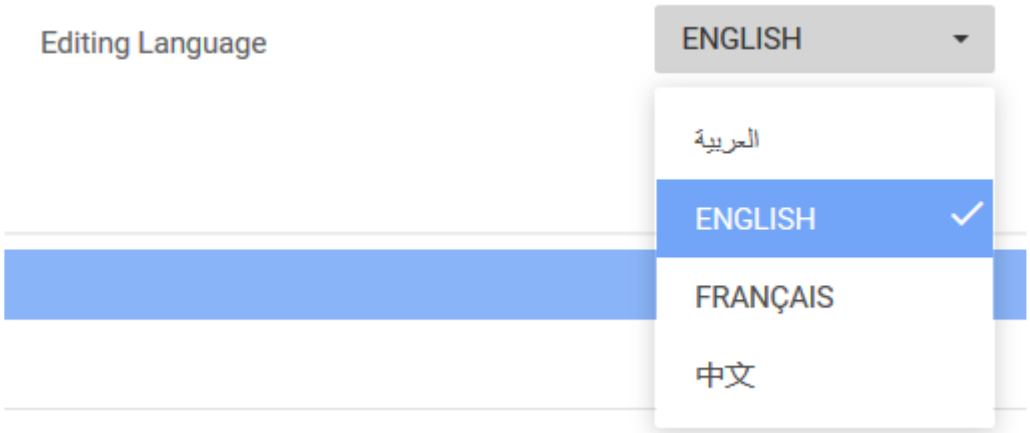


2. Navigate to the Editing Language box



3. A drop-down menu will be generated with the different languages you can input content in.

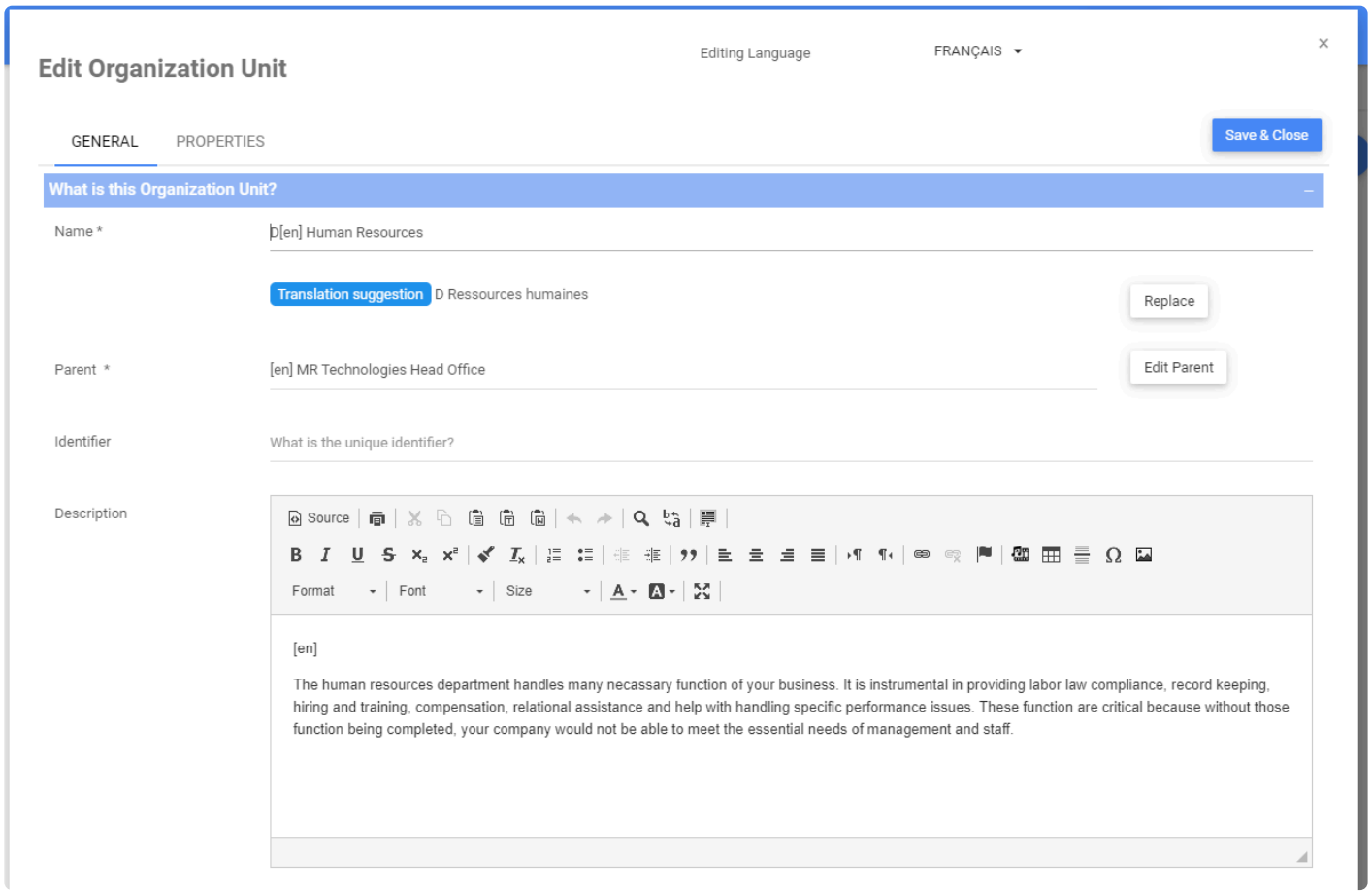
> The list of languages depencs on the EPC's multilingual license



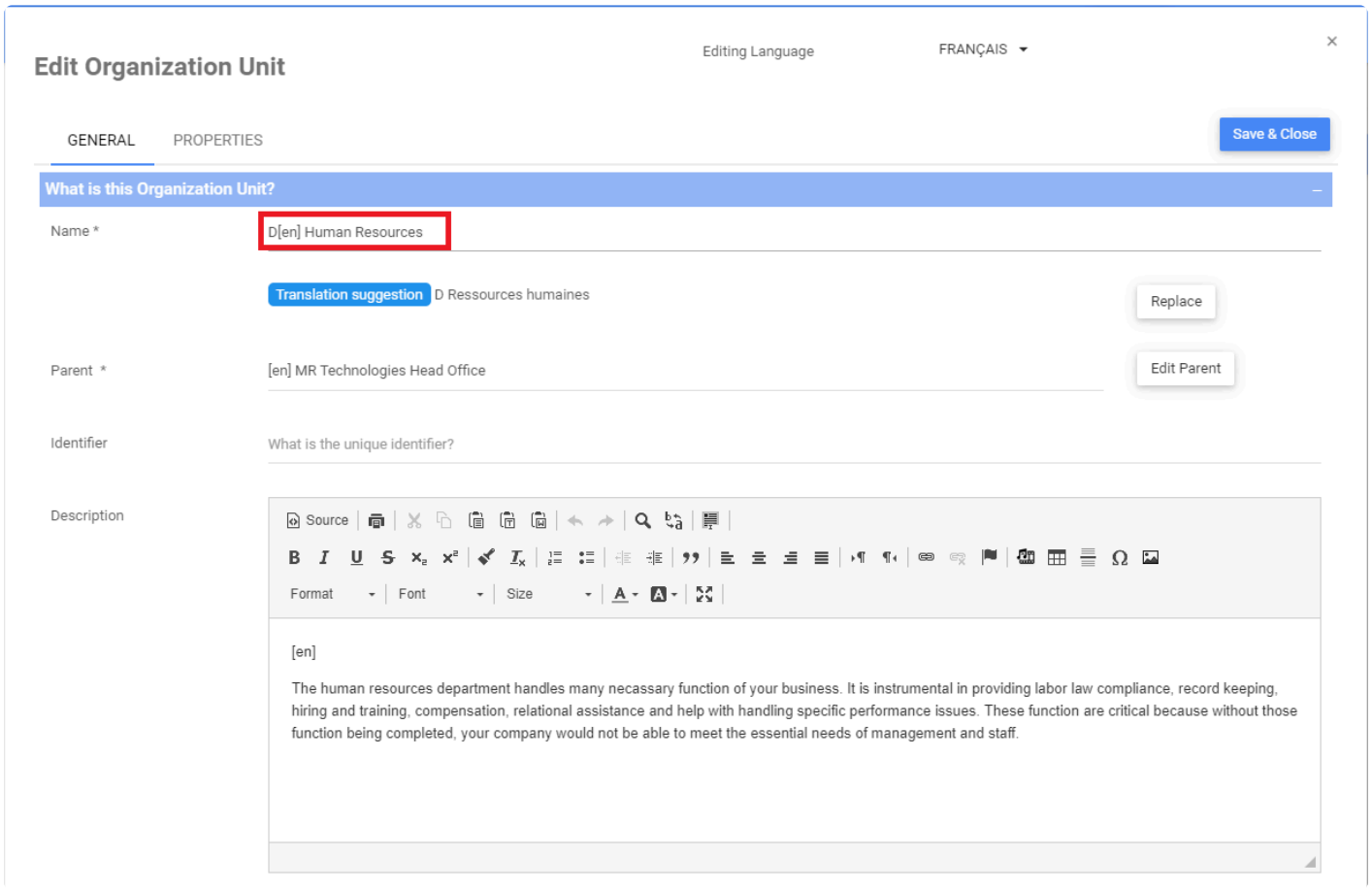
4. Select the language you want to edit the content in. In this example, choose French

5. The Interface Language will switch to the language you chose in the previous step. You will also receive a notification saying the record was updated successfully.

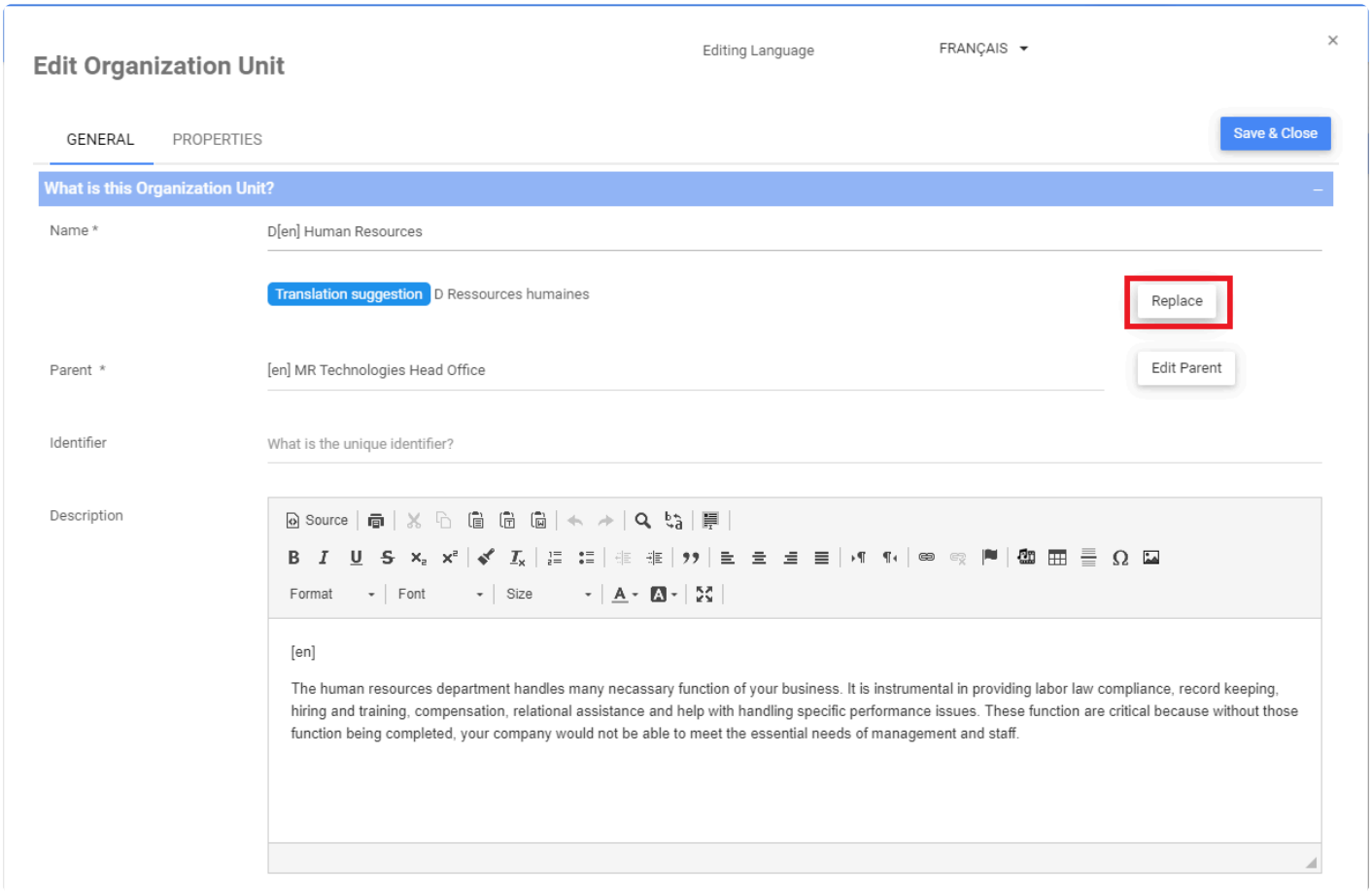
> The object content will still be in English because it has not been translated yet. A language abbreviate in brackets will appear next to the name of the item (e.g. French as [fr], English as [en], Spanish as [sp], etc.), in this case [en].



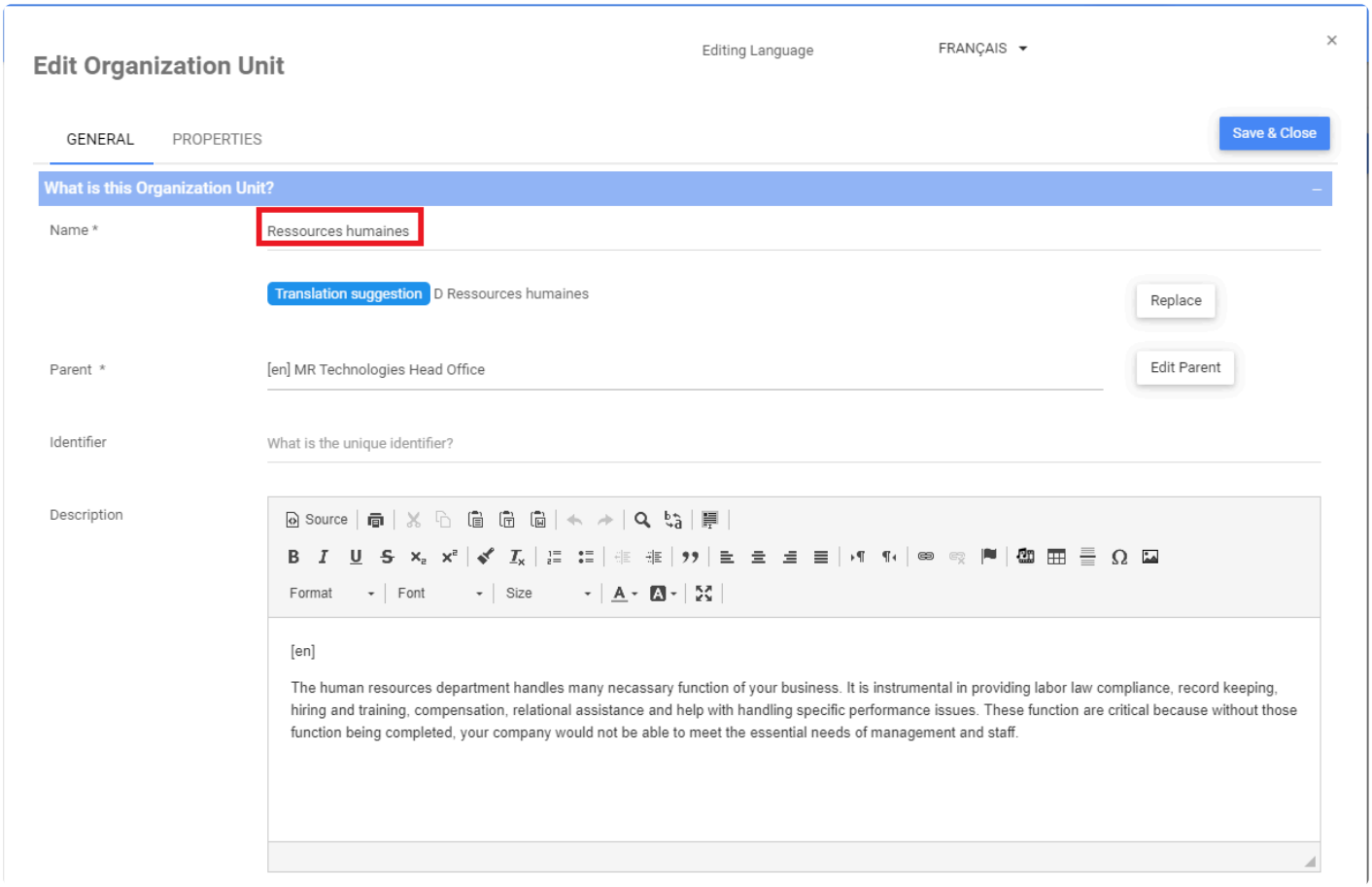
6. Navigate to the Name field



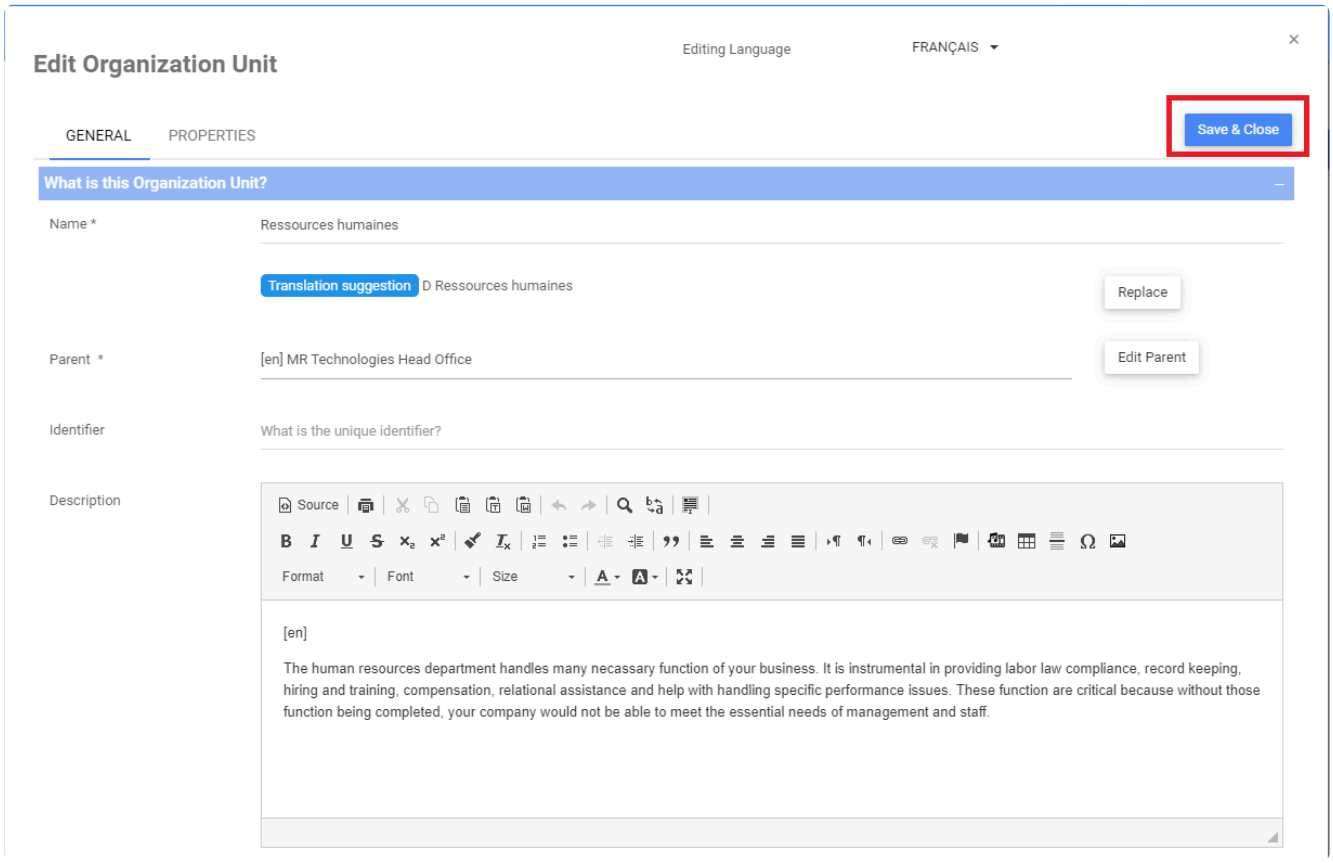
7. Select the English name of the object. In this example, select “[en] Human Resources”. The automatic translation will suggest a translation. Review it and click on Replace.



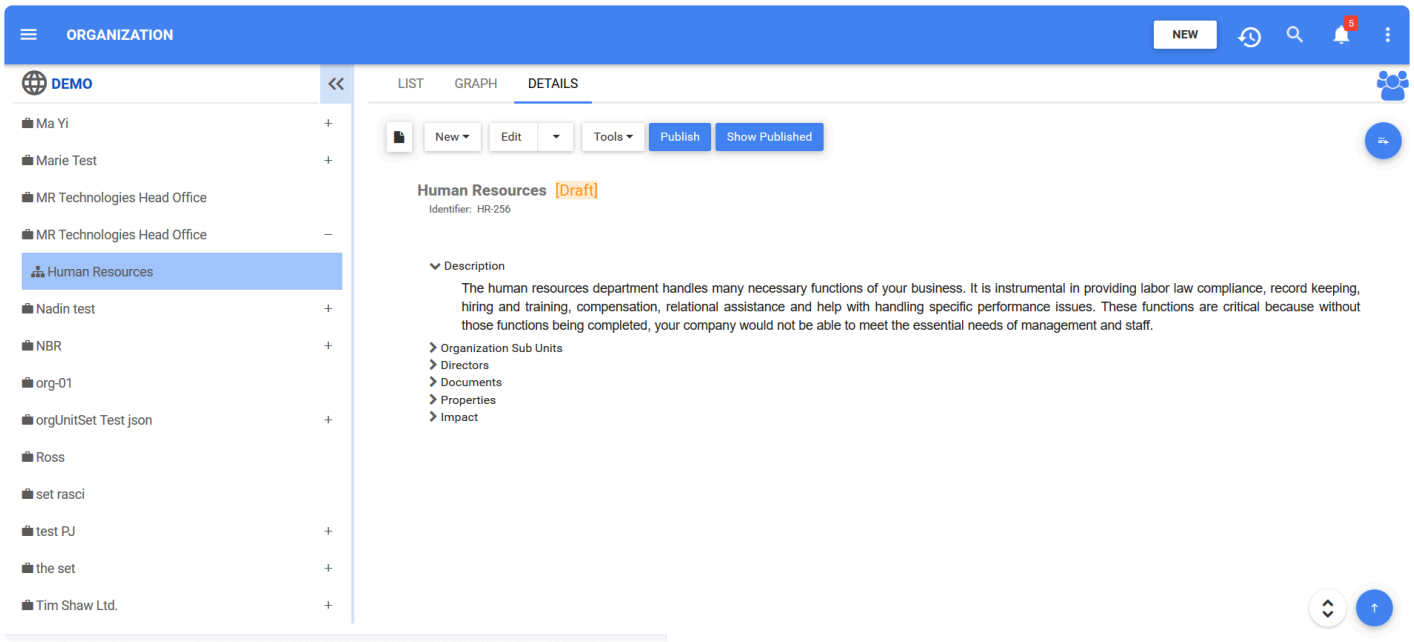
8. The French name of the Organization Unit is displayed in the Name section now



9. Click on Save & Close



10. You will be redirected to the Details tab of the object

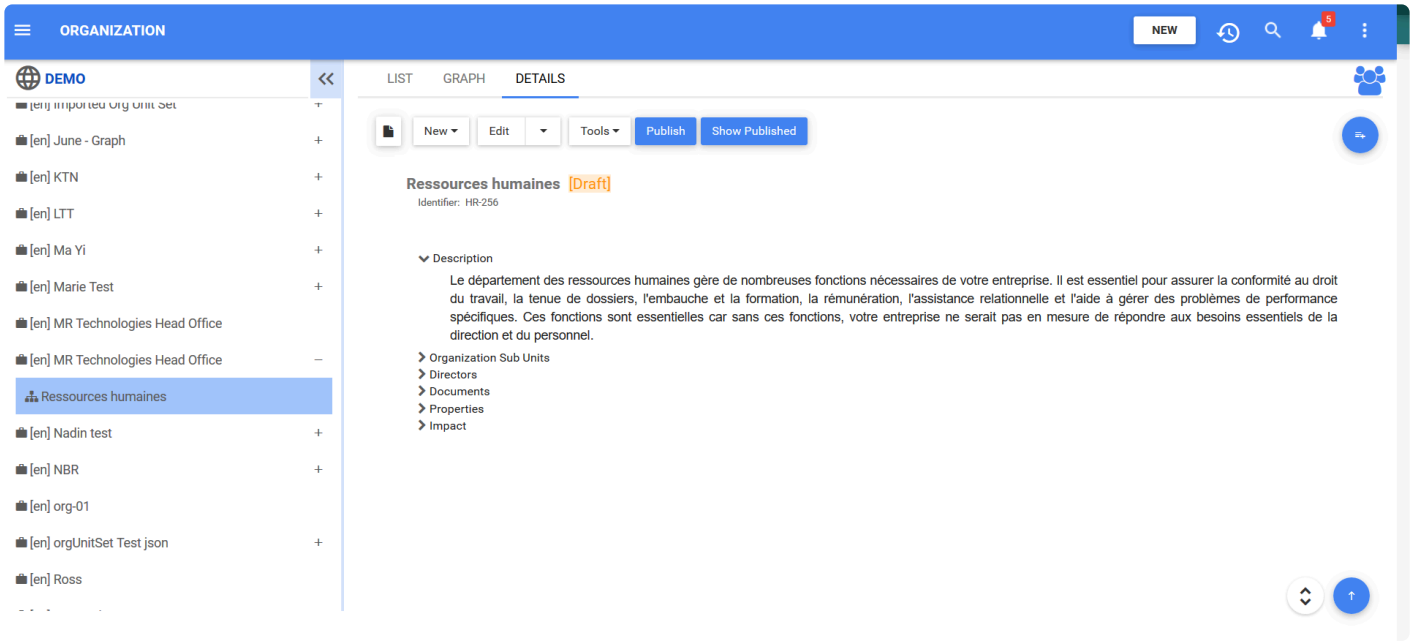


> The Interface and content language are in English. You need to change your preferences in My Profile section to see the content in a different language

11. Change the Content language of your profile to French, and navigate to the “Human Resources” Organization Unit. The content will be in French.

> Since we only changed the Content Language to French, the Interface Language is still English

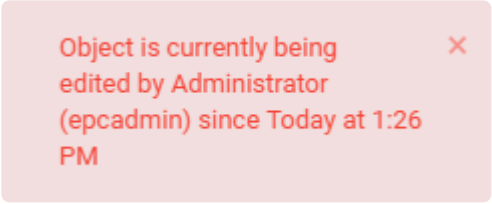
> Other objects that are not translated to French will have a [en] abbreviation bracket next to their name to identify they are in English.


ORGANIZATION
NEW
DEMO
LIST
GRAPH
DETAILS
[en] June - Graph
[en] KTN
[en] LTT
[en] Ma Yi
[en] Marie Test
[en] MR Technologies Head Office
[en] MR Technologies Head Office
Ressources humaines
[en] Nadin test
[en] NBR
[en] org-01
[en] orgUnitSet Test json
[en] Ross
New
Edit
Tools
Publish
Show Published
Ressources humaines [Draft]
Identifier: HR-256
Description
Le département des ressources humaines gère de nombreuses fonctions nécessaires de votre entreprise. Il est essentiel pour assurer la conformité au droit du travail, la tenue de dossiers, l'embauche et la formation, la rémunération, l'assistance relationnelle et l'aide à gérer des problèmes de performance spécifiques. Ces fonctions sont essentielles car sans ces fonctions, votre entreprise ne serait pas en mesure de répondre aux besoins essentiels de la direction et du personnel.
Organization Sub Units
Directors
Documents
Properties
Impact

12.1.1.4 Edit Lock

Either by creating new content or editing existing content, objects in EPC are in constant evolution and can regroup a lot of information in their different specific areas. To avoid conflict between two users potentially editing the same object, any user editing an object in EPC locks it for all other users.

Anyone trying to click on a functionality that can't be accessed if the object is locked will receive a message similar to this one:



The different functionalities that are impacted by the lock are the following ones:

- Process Editing
- New objects
- Merge
- Move
- Copy
- Delete
- Localize
- Reference
- Publish
- Import and Export
- Restore
- Governance Module Editing

12.1.1.4.1 Lock – Process Editing

In terms of editing, the Process Module is a bit different from all other modules: users can edit content from the Graph page and from the Details page.

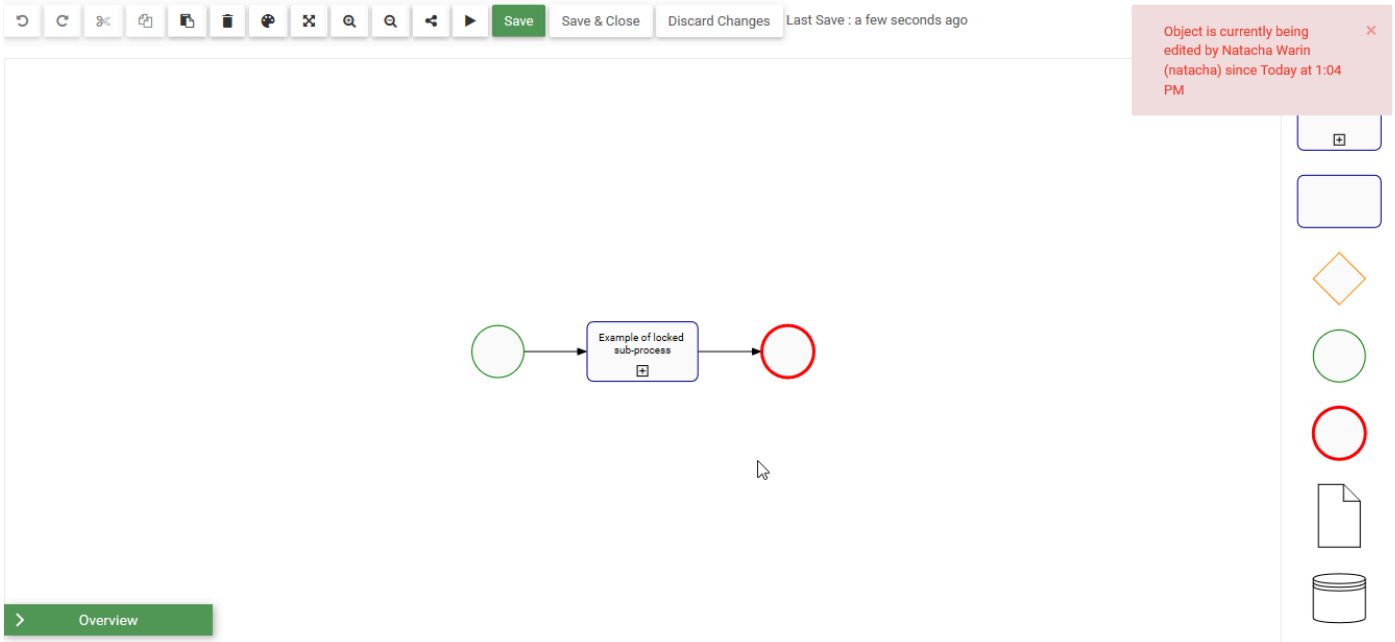
By clicking on any “Edit” button, a user locks the object in both the Graph and the Details page for other users.

Process Flow Objects

Editing a process implies editing the objects that are mapped in the Graph. So by locking a process, all basic flow objects can’t be accessed: events, gateways, tasks. They will be unlocked once the process is unlocked.

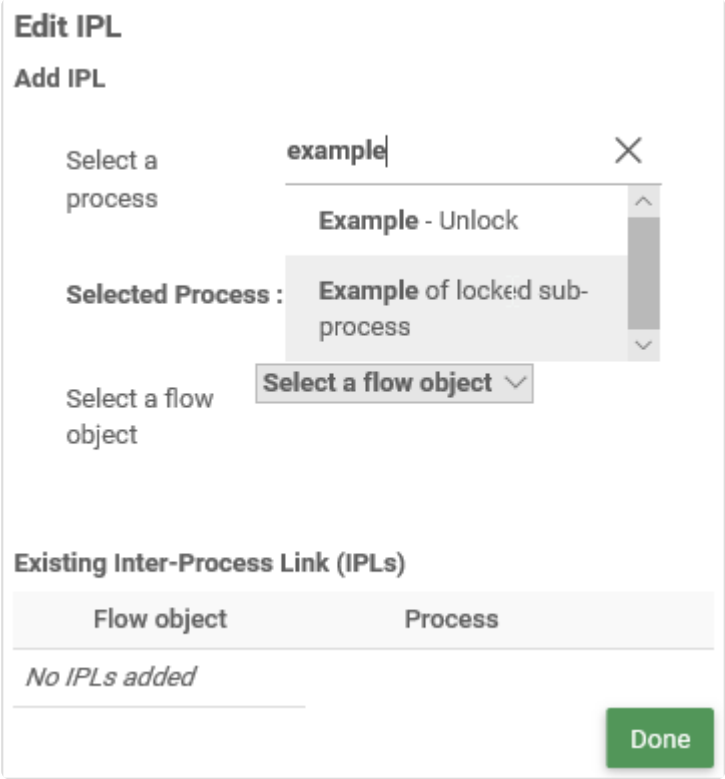
Process Sub-processes

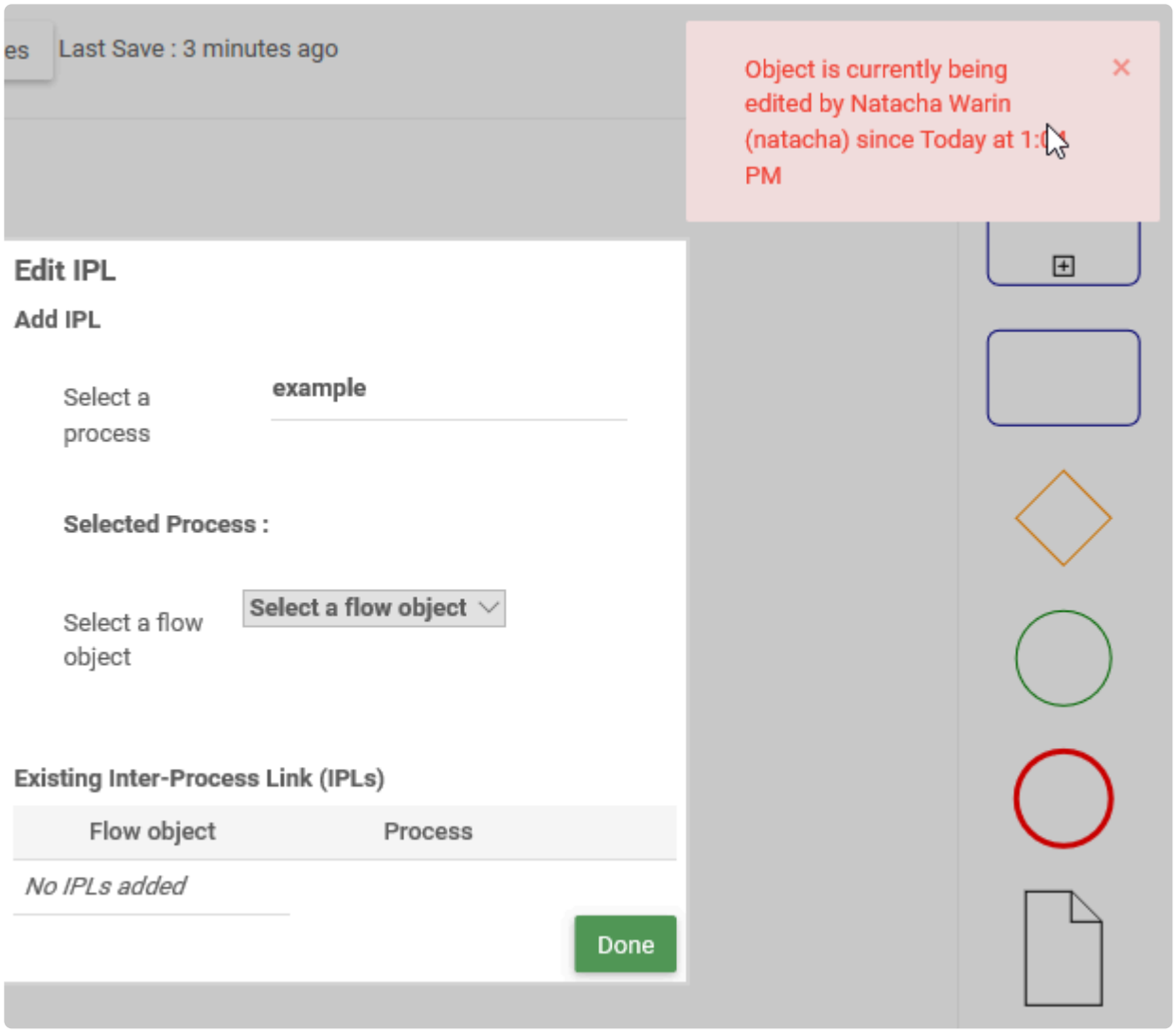
- Sub-processes can still be edited, and are not locked if their parent is being edited.
- A user editing the parent in the Graph, in the case of a locked sub-process, will not be able to use any right options on the sub-process or edit it’s name, or delete it.



Creating IPLs

In the Graph editor, creating an IPL to a process that is locked is prevented, and the user will receive an error message.


Edit IPL
Add IPL
Select a process
example
Example - Unlock
Selected Process :
Example of locked sub-process
Select a flow object
Select a flow object
Existing Inter-Process Link (IPLs)
Flow object
Process
No IPLs added
Done


es
Last Save : 3 minutes ago
Object is currently being edited by Natacha Warin (natacha) since Today at 1:0
PM
Edit IPL
Add IPL
Select a process
example
Selected Process :
Select a flow object
Select a flow object
Existing Inter-Process Link (IPLs)
Flow object
Process
No IPLs added
Done

12.1.2 Create

Web Modelers can create content directly in the WebApp. Each module's objects are organized in a hierarchical manner, and some module have certain particularities in the hierarchy based on their context. The table below lists the types of objects that can be created by a Web Modeler, under which parent object they can be created, and a link to the relevant instructions for creation.

Object Type	Parent Object(s)	Creation Instructions
Set	Environment	Create a Set
Folder	Set OR Folder	Create a Folder
Process	Set OR Process	Create a Process
Flow Object (Event, Task, Gateway, Shortcut	Process	Create a Flow Object
Document	Folder	Create a Document
Performance Objective	Set OR Objective	Create a Performance Objective
Performance Indicator (KCI, KPI, KRI)	Objective OR Performance Indicator	Create a Performance Indicator
Organization Unit	Set OR Organization Unit	Create an Organization Unit
Role	Organization Unit	Create a Role
Resource	Organization Unit	Import Users as Resources
Asset	Organization Unit	Create a Asset
Rule	Folder	Create a Rule
Risk	Folder	Create a Risk
Control	Folder	Create a Control

The Create section will cover the general following sections:

1. Create Sets
2. Create Folders
3. Create Objects

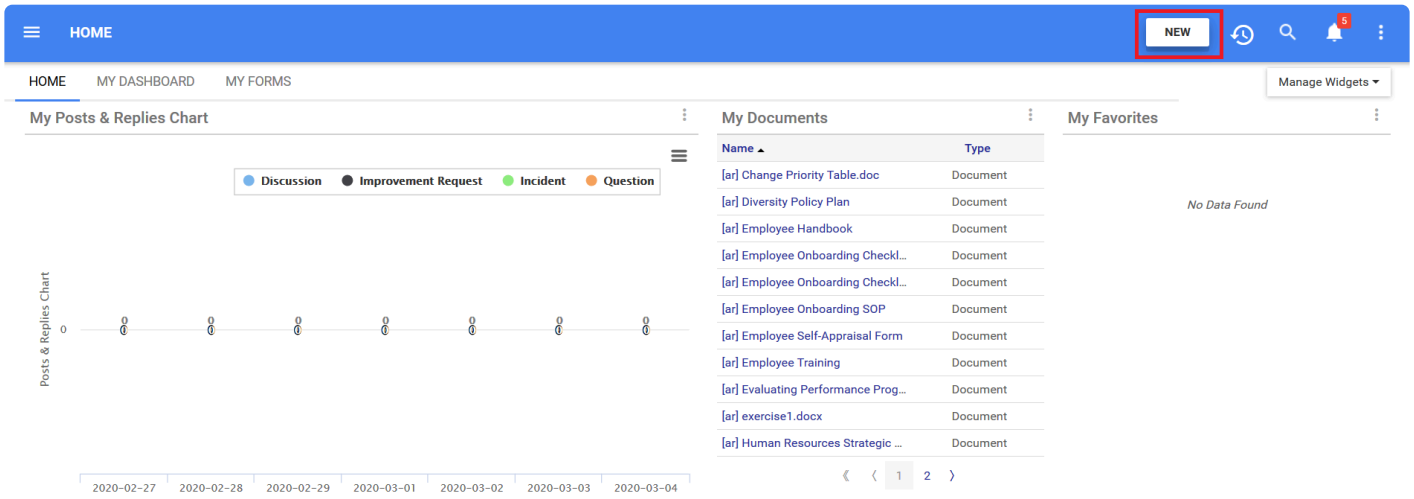
12.1.2.1 Create Sets

To Create a New Set, please follow the instructions below:

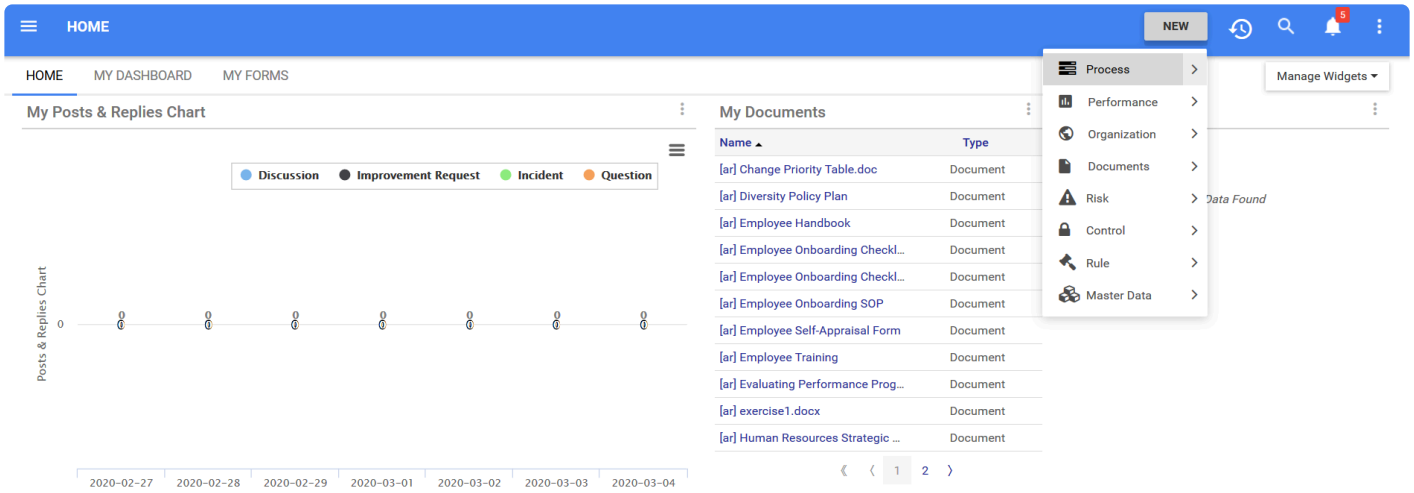
1. Navigate to the NEW button on the top-right of the EPC WebApp page.

> Ensure you are given the permission to be a Web Modeler, the displayed content of your profile is set to Show Latest, and your editing tool is the Web.

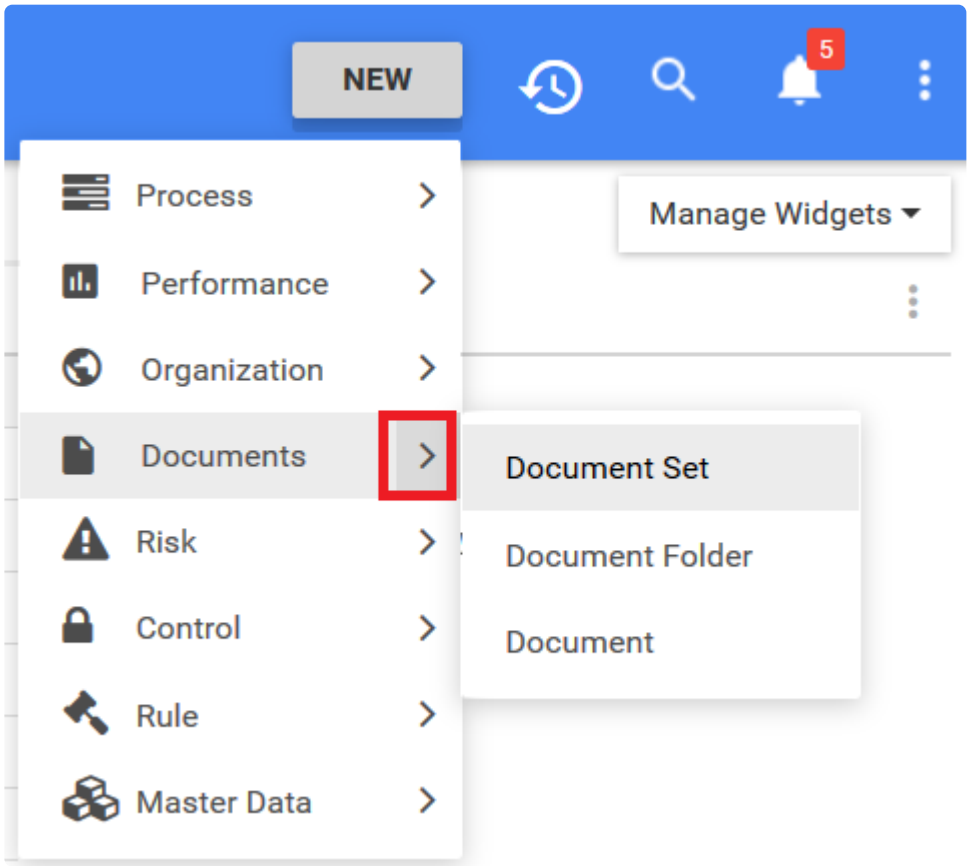
> The “New” button can be accessed from any page of the Web App



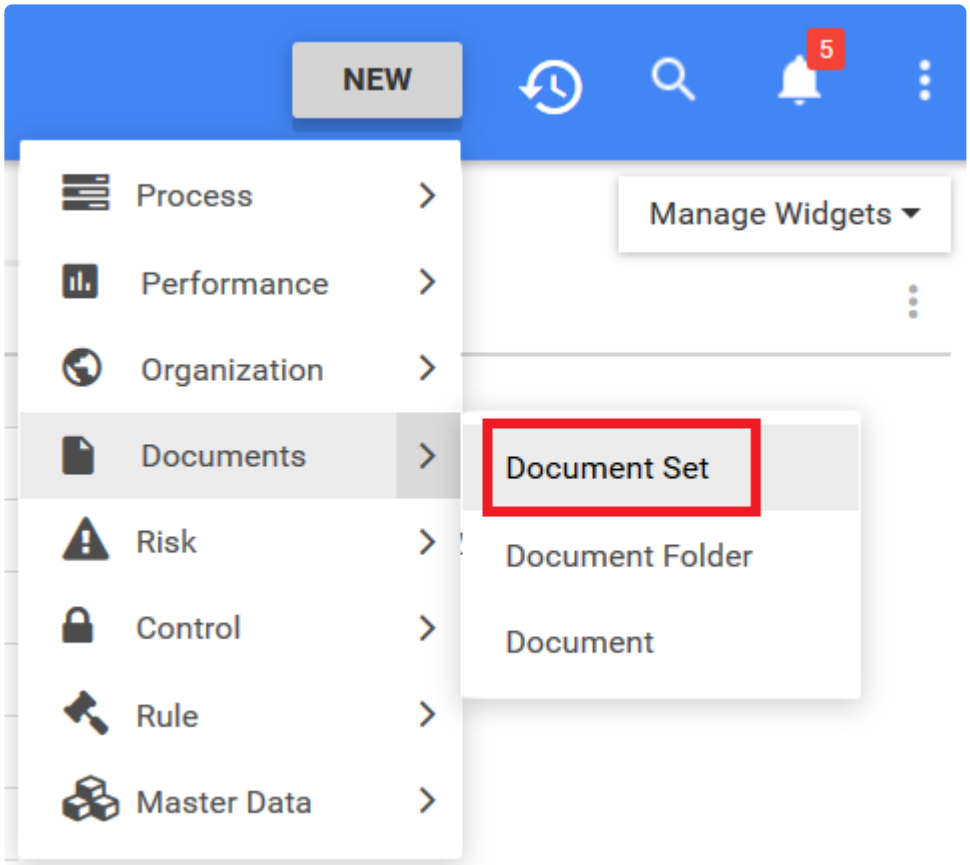
2. After clicking on the NEW button, a drop-down menu will appear with all the modules of the EPC where a new object can be created.



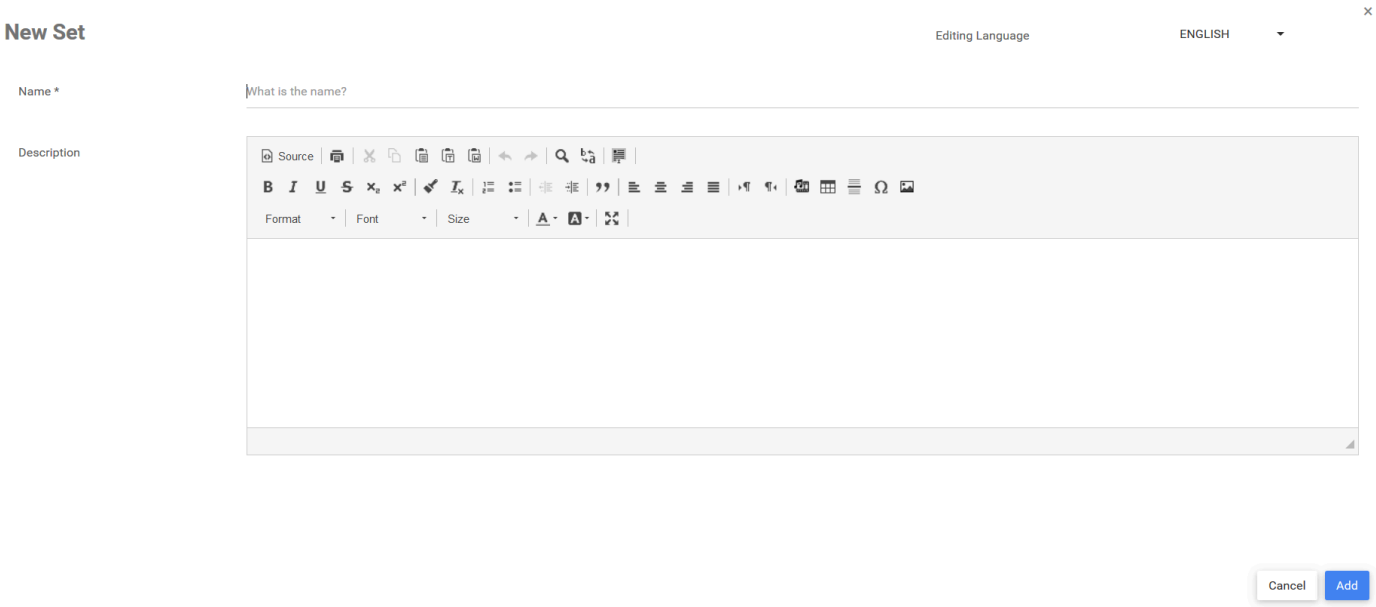
3. Navigate to the module type in which you would like to create a set **(In this example, a Document Set)** and click on the > icon. Another drop-down menu will appear with the different objects that can be created within the Document Module.



4. Click on the “Set” option to create a new set

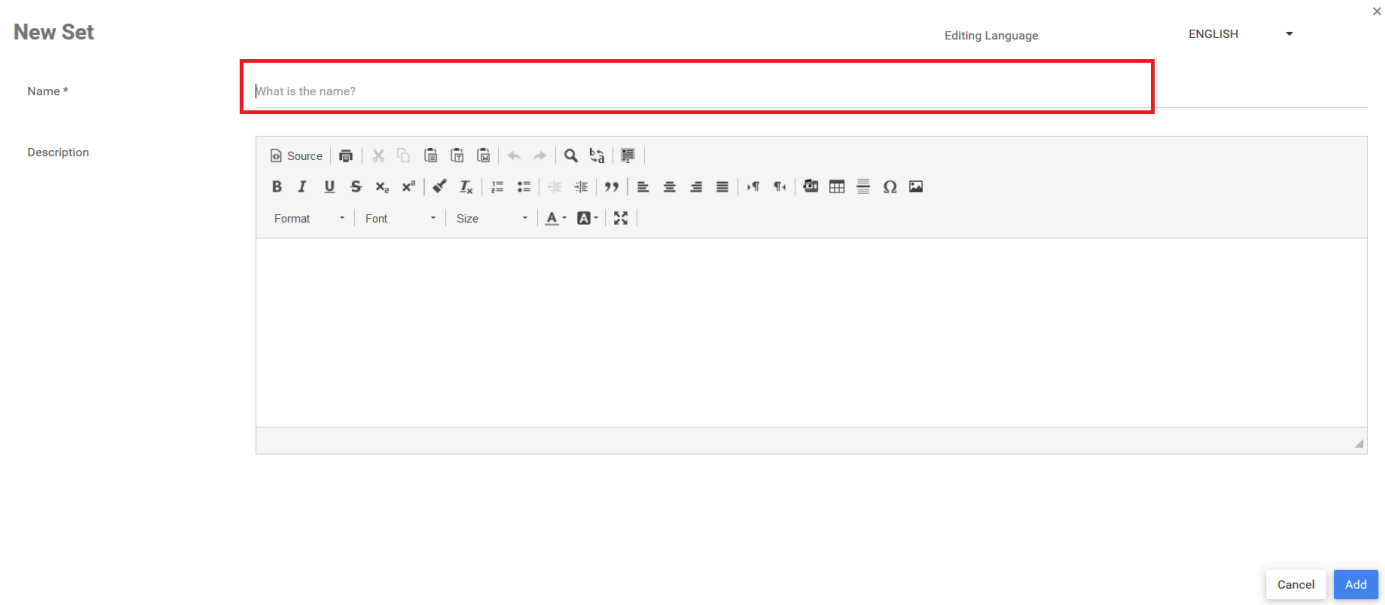


5. The window to create a new Set for the relevant module will appear

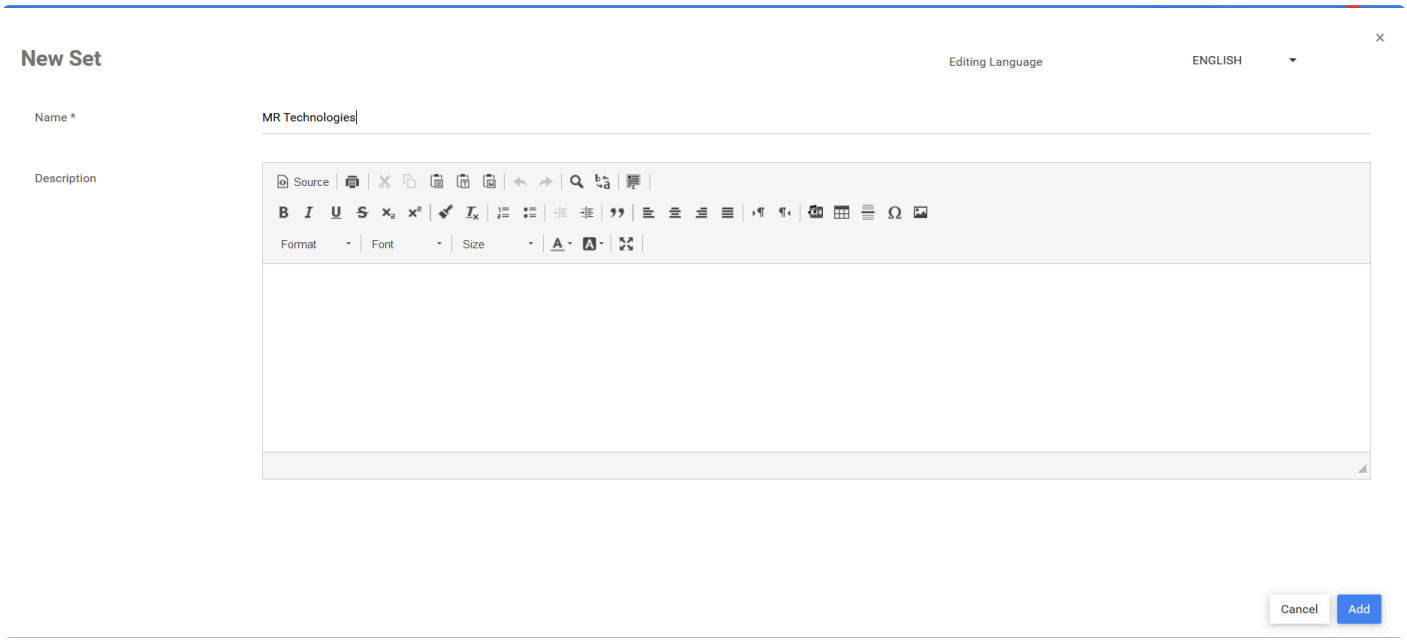


6. Type the name of the Set in the “What is the name?” field

> The Name field is **mandatory** for all objects.



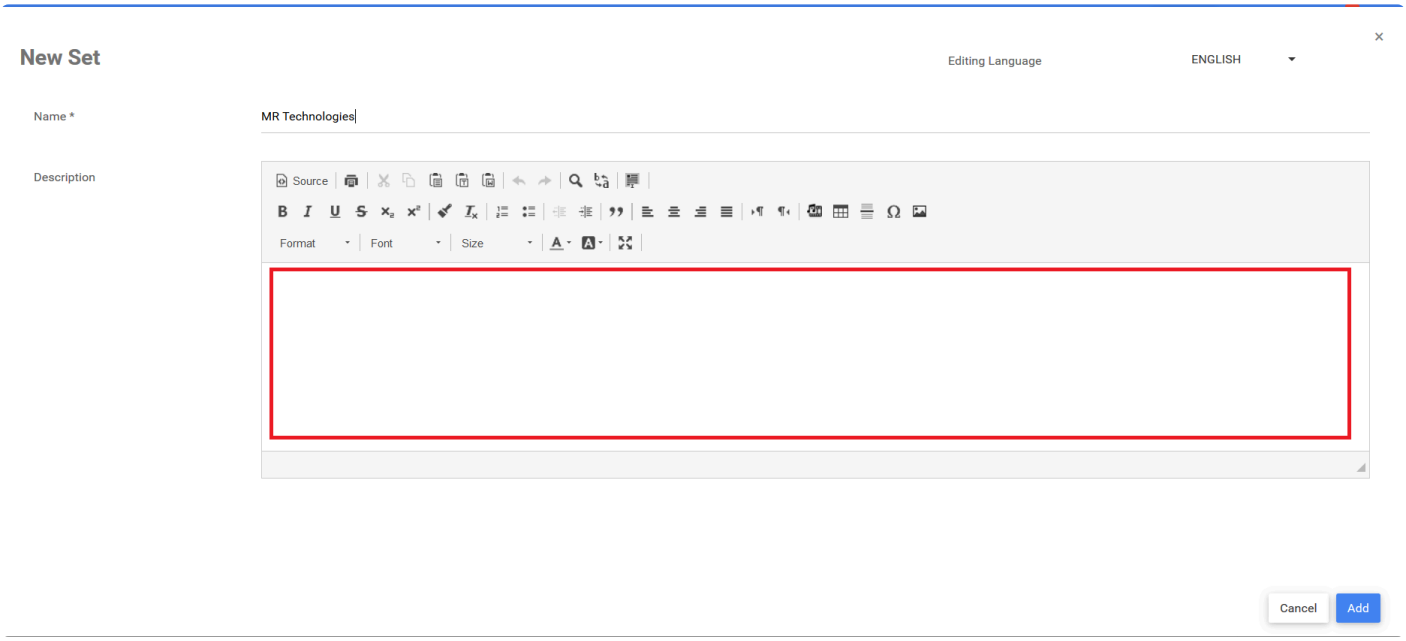
For this example, the name of the Document Set is “MR Technologies”



> The EPC automatically assigns the Document Set to the Parent, which is the Environment. The Parent field is blocked and cannot be edited.

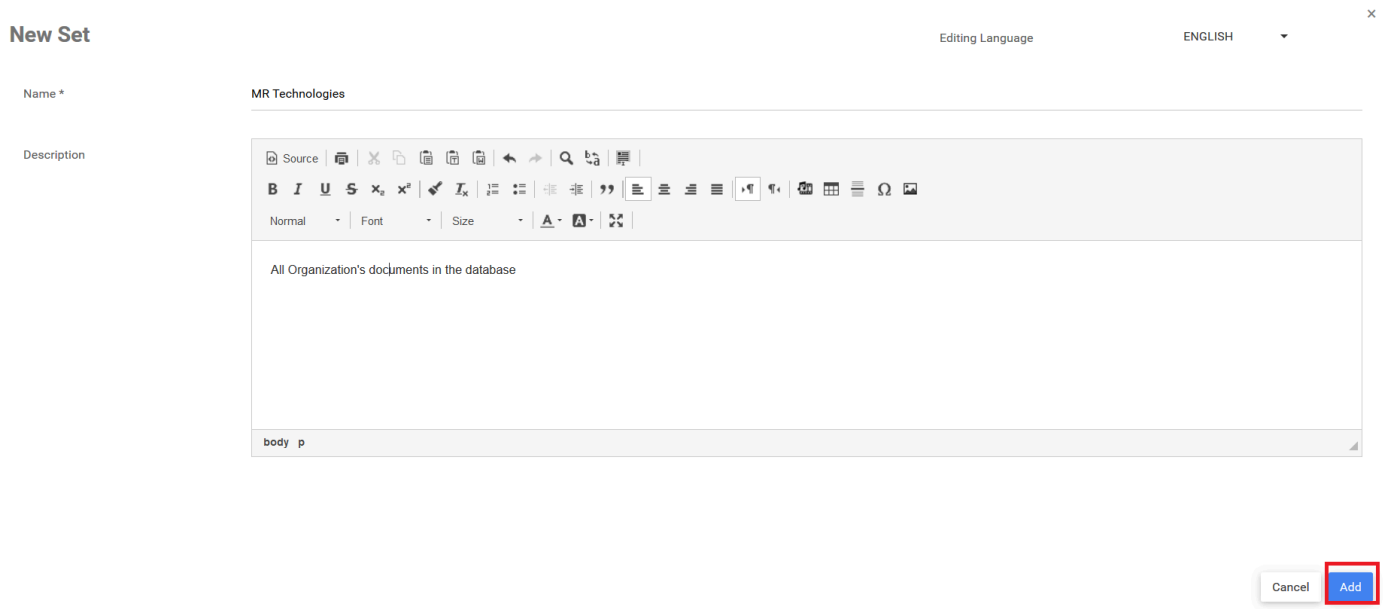
7. Type the description of the Set in the Description field

> This field is not mandatory, but it is recommended to input a description

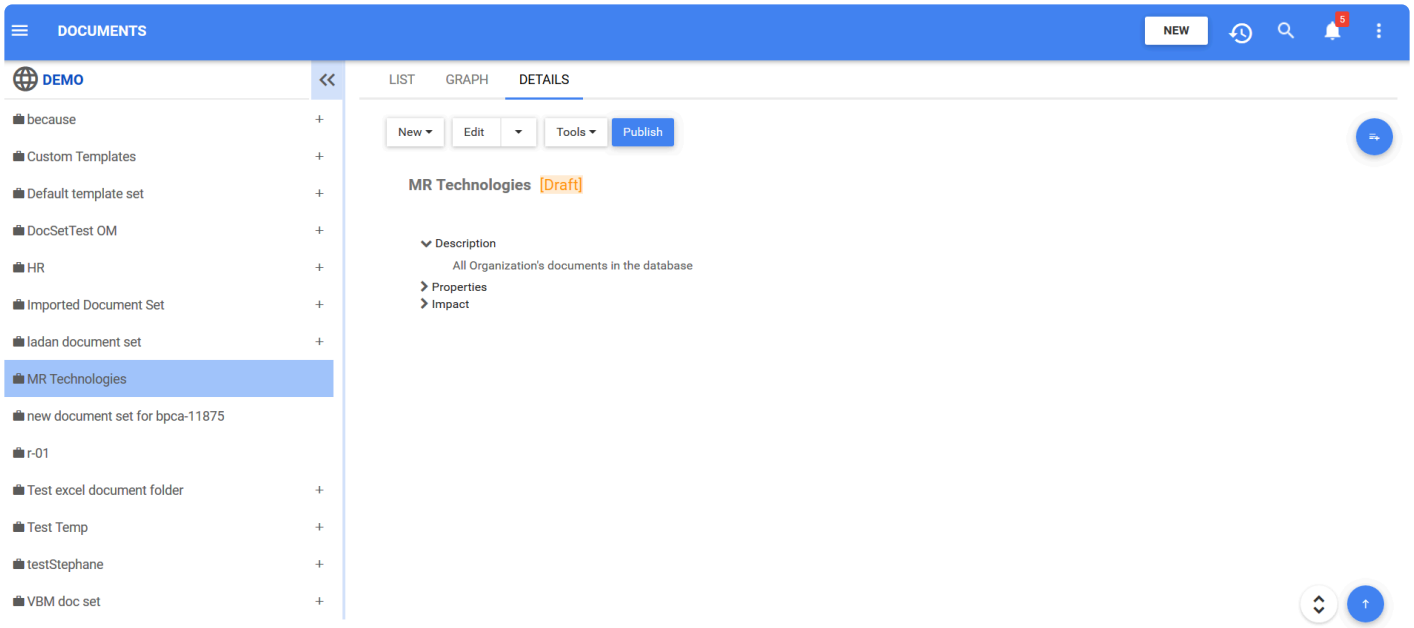


8. Click on the

button to finish the creation of the new Set. You will be automaticall redirected to the new set object in the relevant module.



9. The new Document Set “MR Technologies” is now on the Document tree structure. This set is currently a draft. To learn how to publish Document objects, click here.


DOCUMENTS
NEW
DEMO
because
Custom Templates
Default template set
DocSetTest OM
HR
Imported Document Set
ladan document set
MR Technologies
new document set for bpca-11875
r-01
Test excel document folder
Test Temp
testStephane
VBM doc set
LIST
GRAPH
DETAILS
New
Edit
Tools
Publish
MR Technologies [Draft]
Description
All Organization's documents in the database
Properties
Impact

12.1.2.2 Create Folders

Folder are used to group objects, similar to the way you use folders on your computer. In the context of EPC, folders can be under a set, or under another folder as a sub-folder. There can be many levels of folders, each with objects within.

Web Modelers can create new Folders on the WebApp. There are two ways to create Folders:

1. Via the NEW on the top-right of the EPC WebApp: Create Folders – New Button
2. Via the Details tab of a Set or Folder (to create a sub-folder): Create Folders – Object Details Tab

Folders are available in the following modules:

- Documents
- Risks
- Controls
- Business Rules

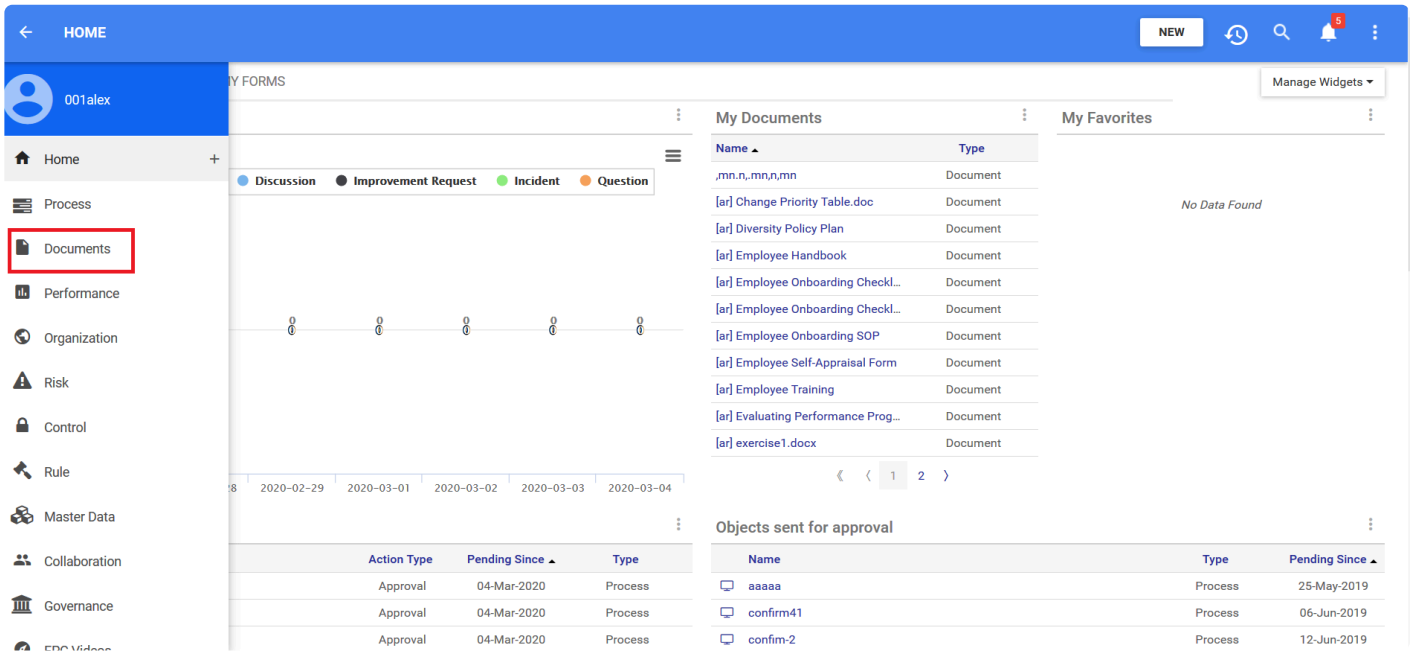
Ensure you are given the permission to be a Web Modeler, the displayed content in your profile is set to Show Latest, and your editing tool is the Web.

12.1.2.2.1 Create Folders – New Button

Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

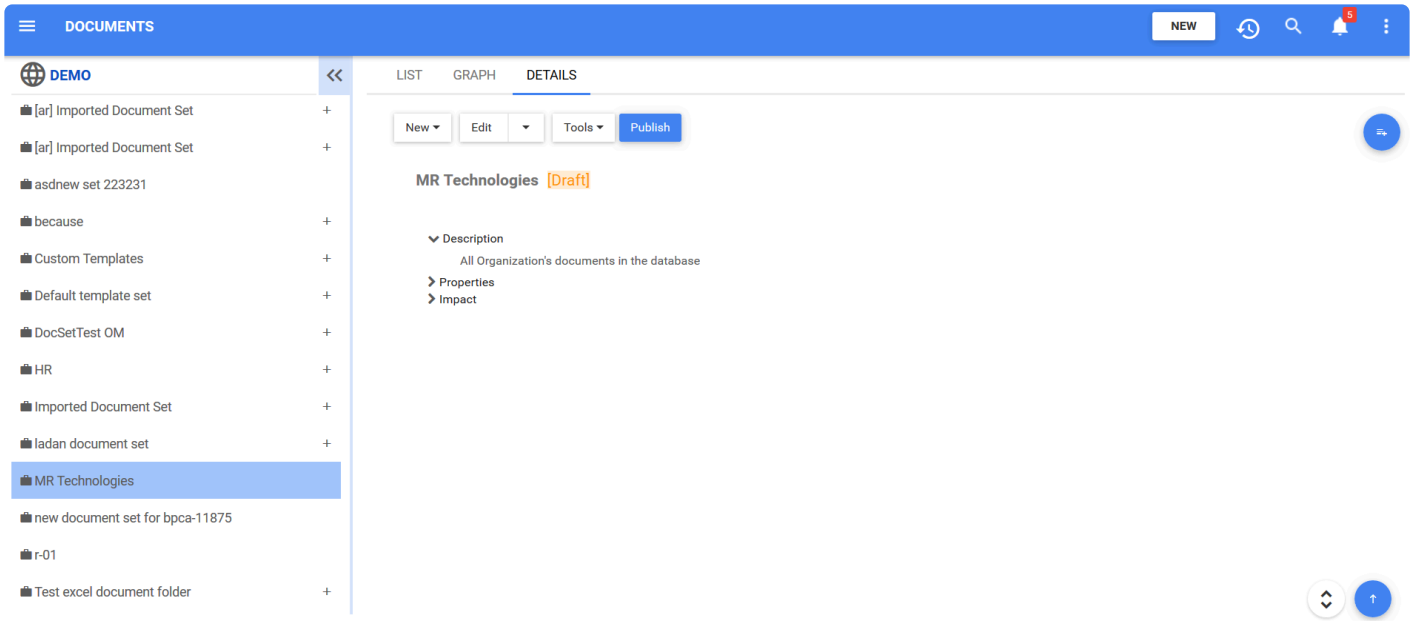
Create a folder from the “New” button on the top-right of the WebApp

1. Click on the Navigation Menu Button on the top left of your screen and navigate to the Module in which you would like to create a folder (in this example, a Document Folder).

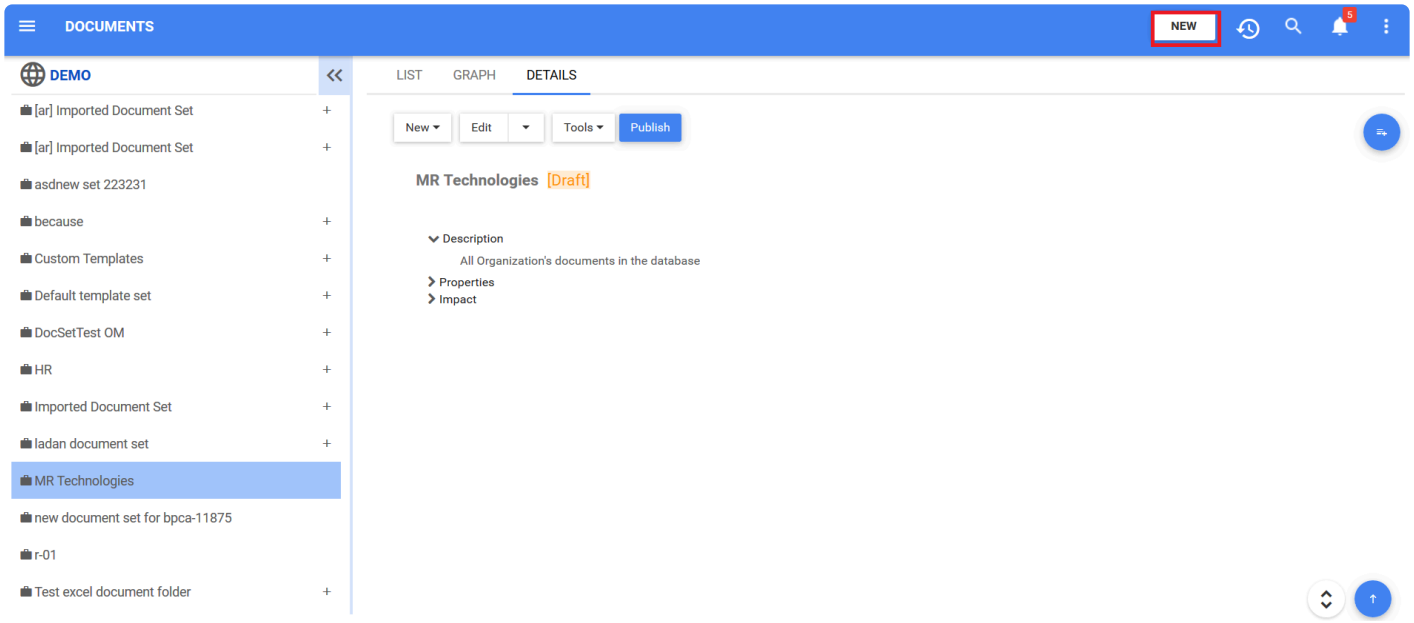


2. Choose the Set or Folder in which you would like to add the new Folder

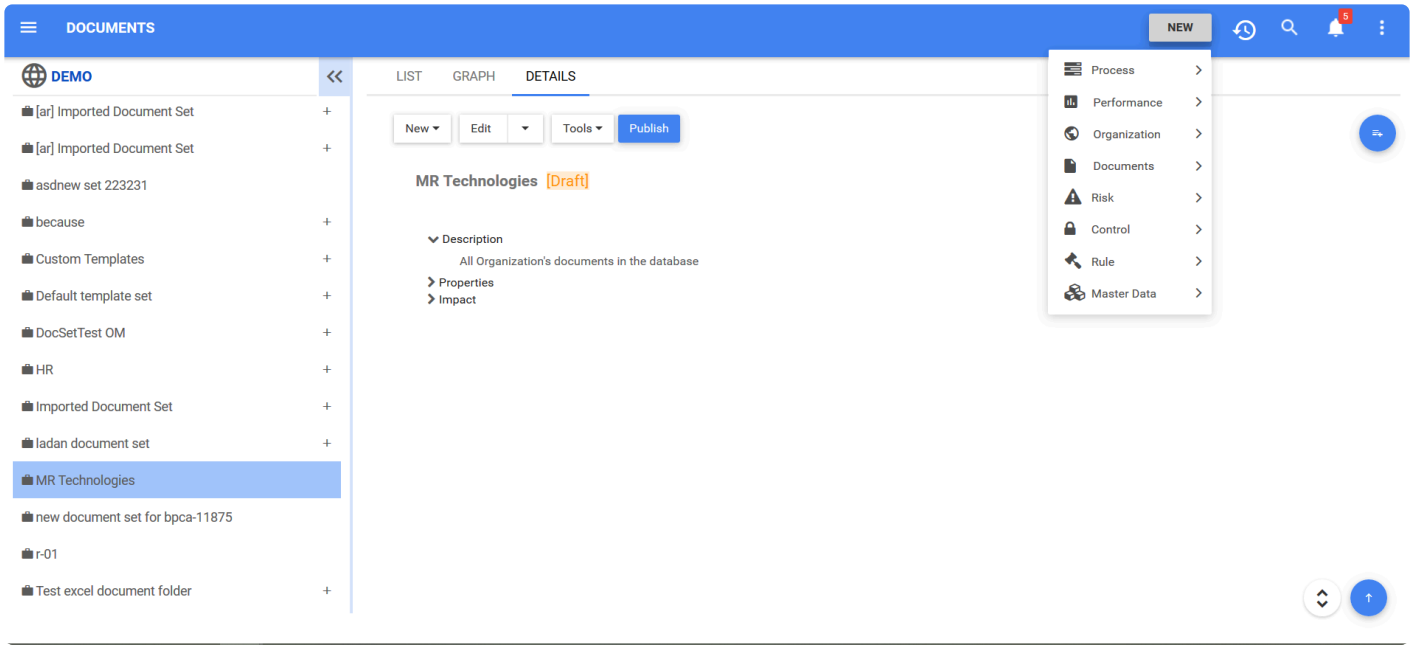
It is very important that you select the right parent Set or Folder, since it cannot be modified.



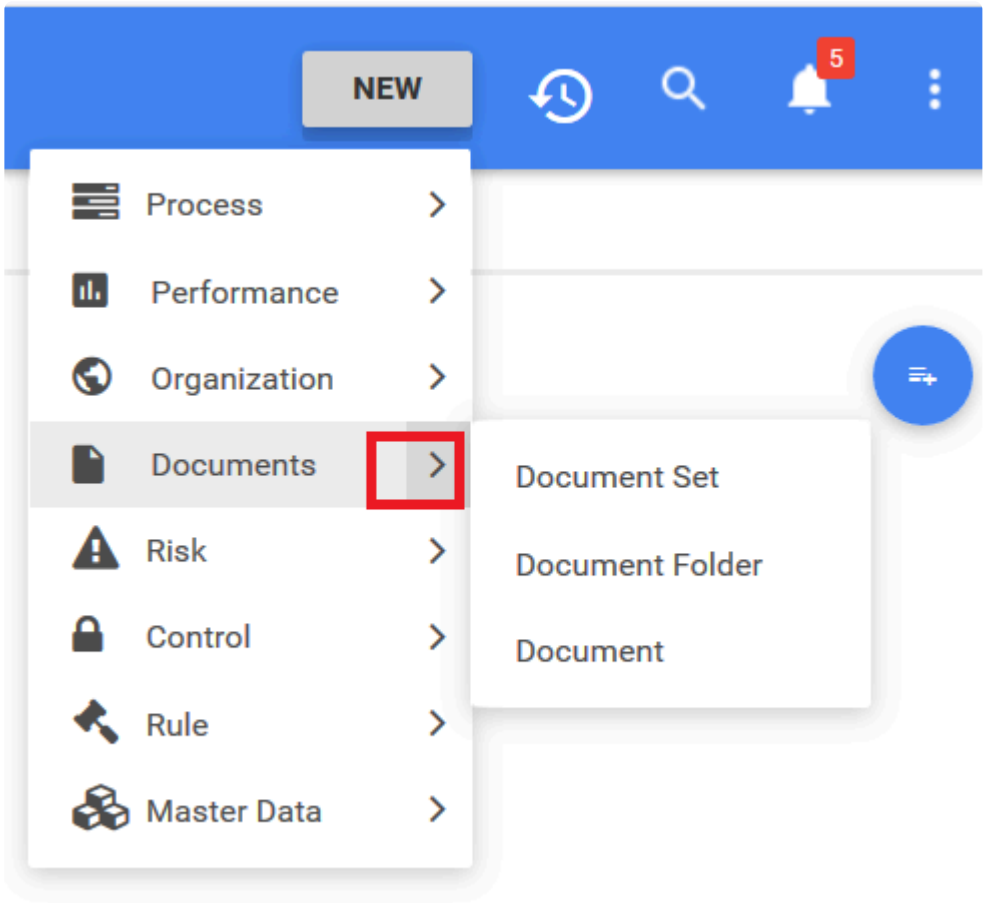
3. Navigate to the NEW button on the top-right of the EPC WebApp page.



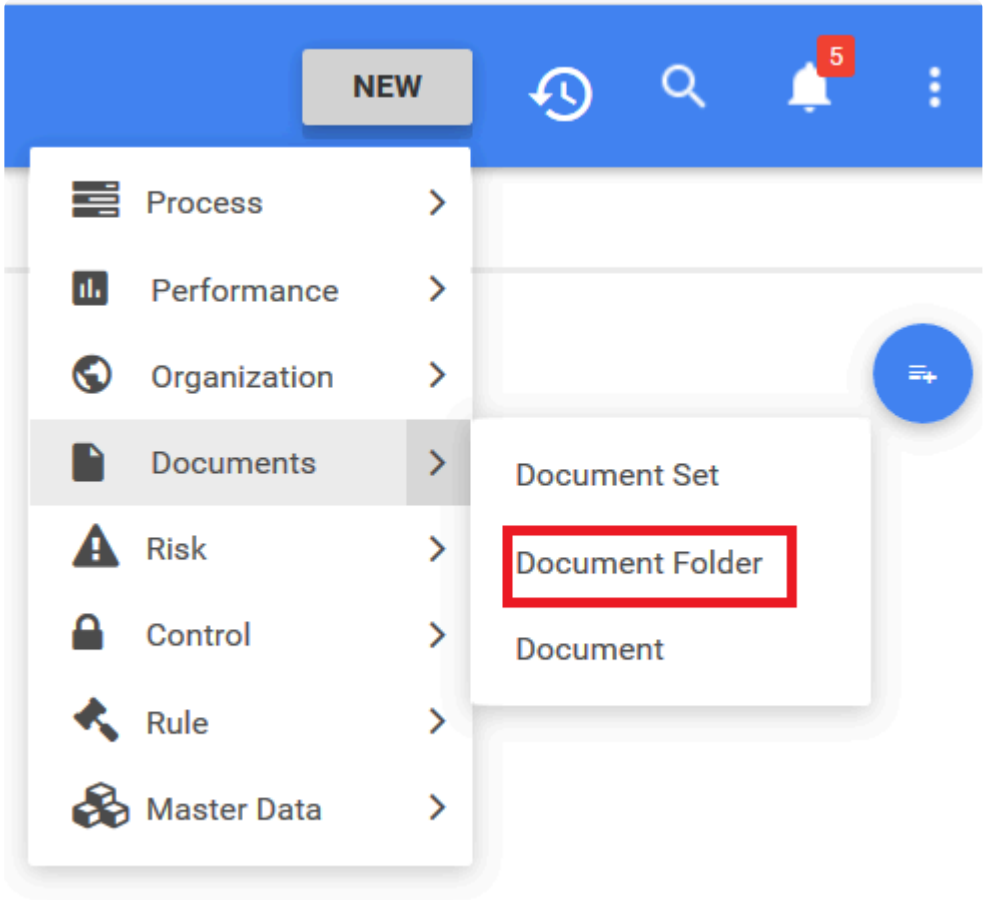
4. After clicking on the NEW button, a drop-down menu will appear with all the modules of the EPC where a new object can be created.



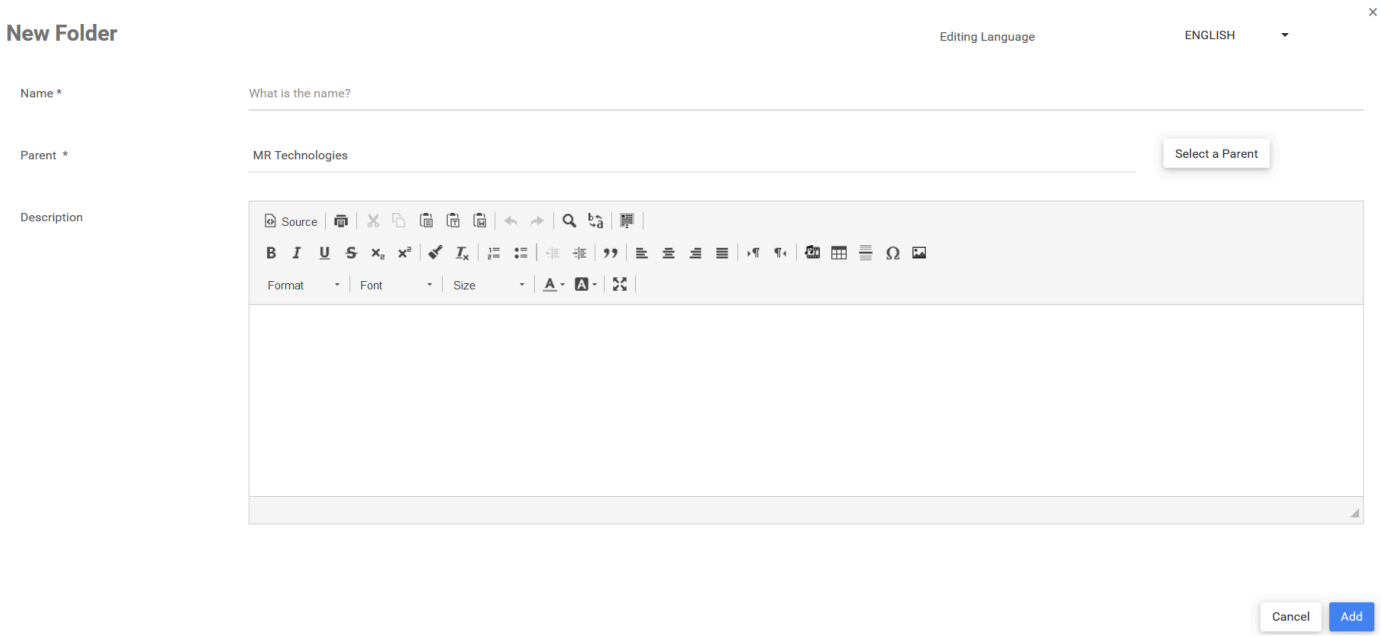
5. Navigate to the desired Module and click on the > icon. Another drop-down menu will appear with the different objects that can be created within the relevant Module.



6. Click on the **"[module] Folder"** option to create a new Folder

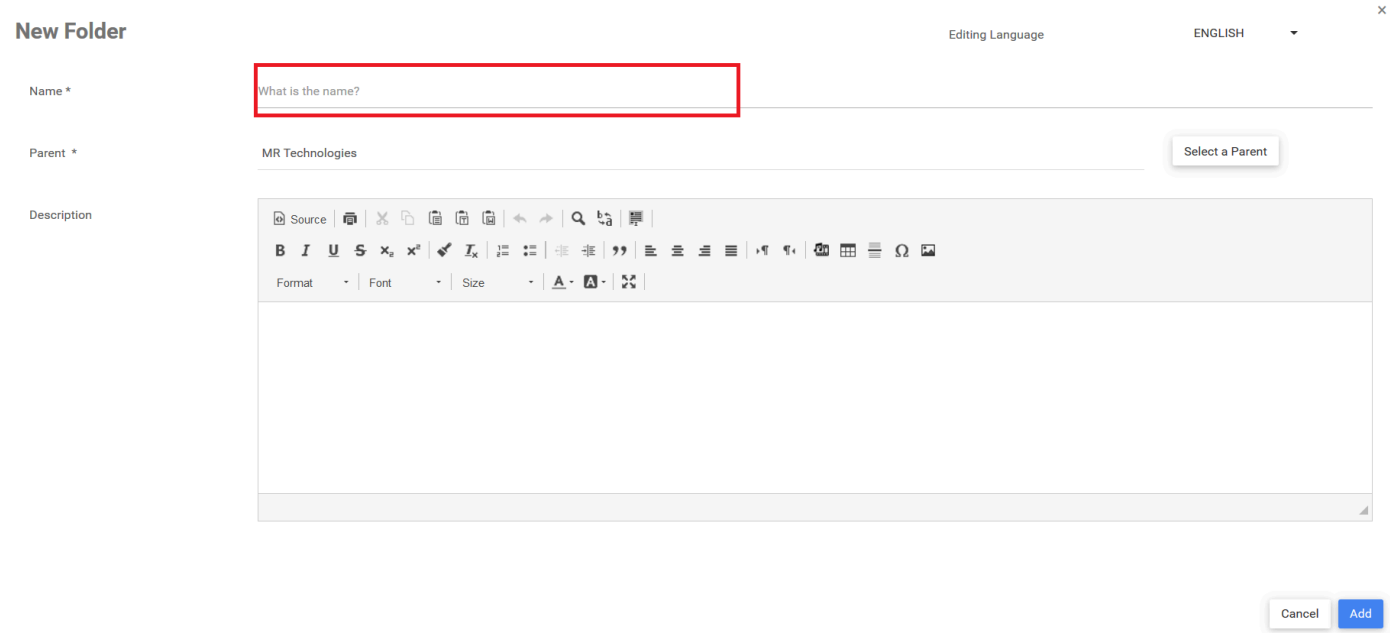


7. A form will be generated where you can input the information about the new Folder

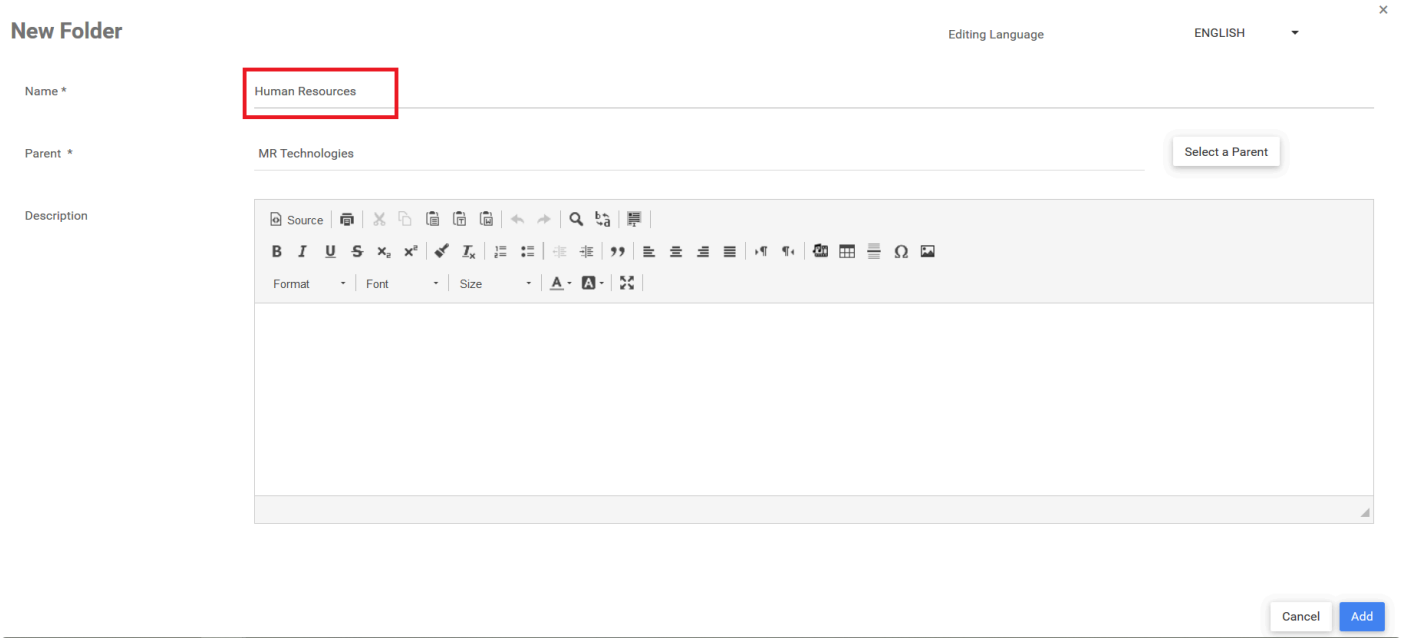


8. Type the name of the Folder on the “What is the name?” field

The Name field is **mandatory** for all objects.



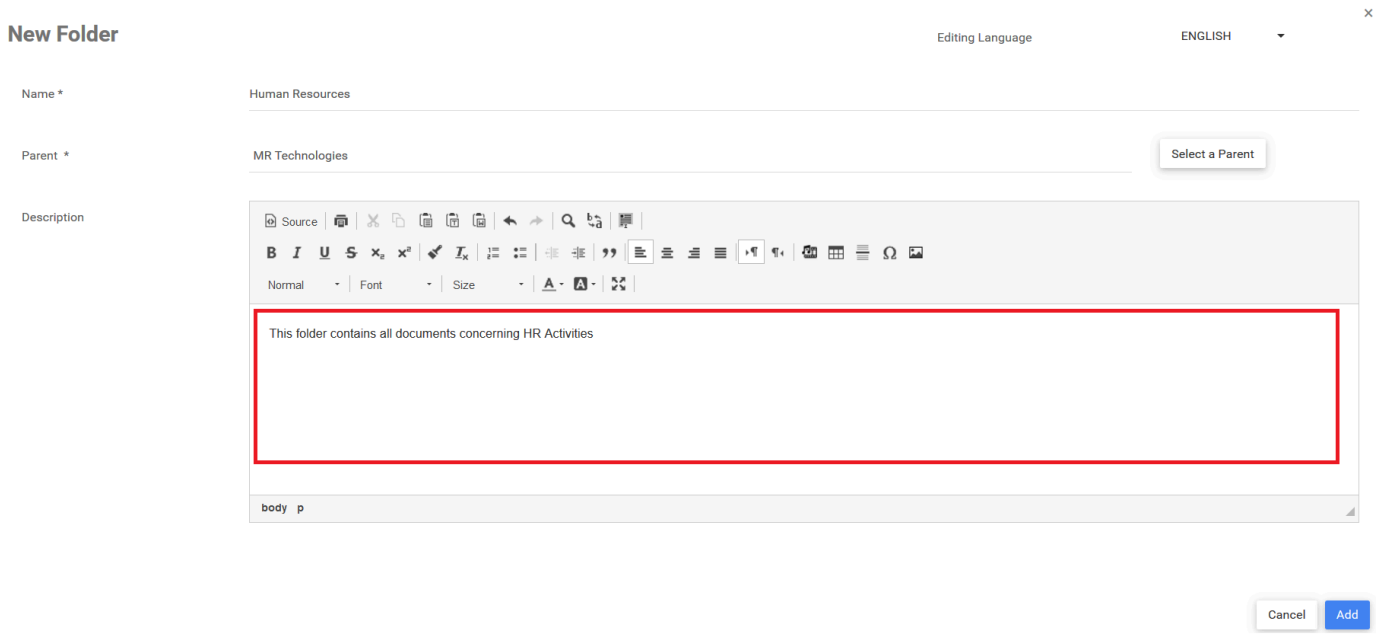
For this example, the name of the Folder is “Human Resources”



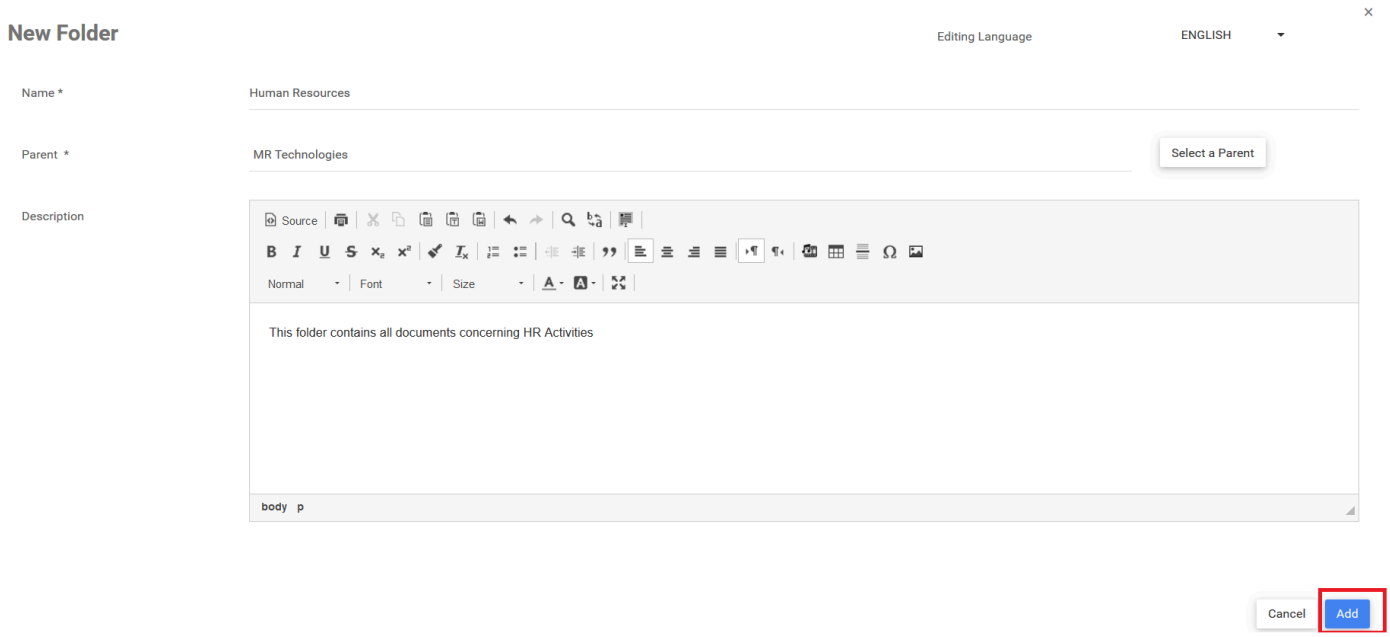
The EPC automatically assigns the Folder to the Parent, which is the Set or Folder you selected in Step 2 above. The Parent field is blocked and cannot be edited.

9. Type the description of the Folder on the Description box

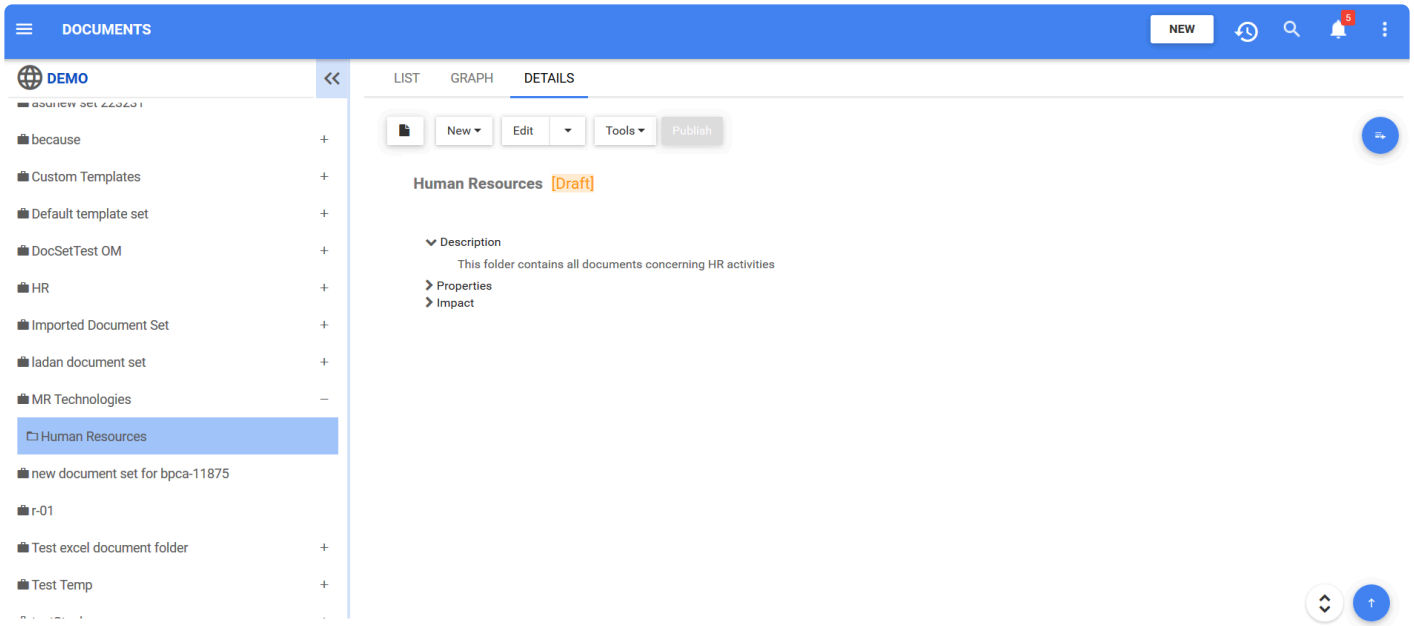
This field is not mandatory, but it is recommended to input a description



10. Click on the Add button to finish the creation of the new Folder



11. The new Folder “Human Resources” is now within the module’s tree structure (under a Set or Folder). This Folder is currently a draft. To learn how to publish Document objects, click here.

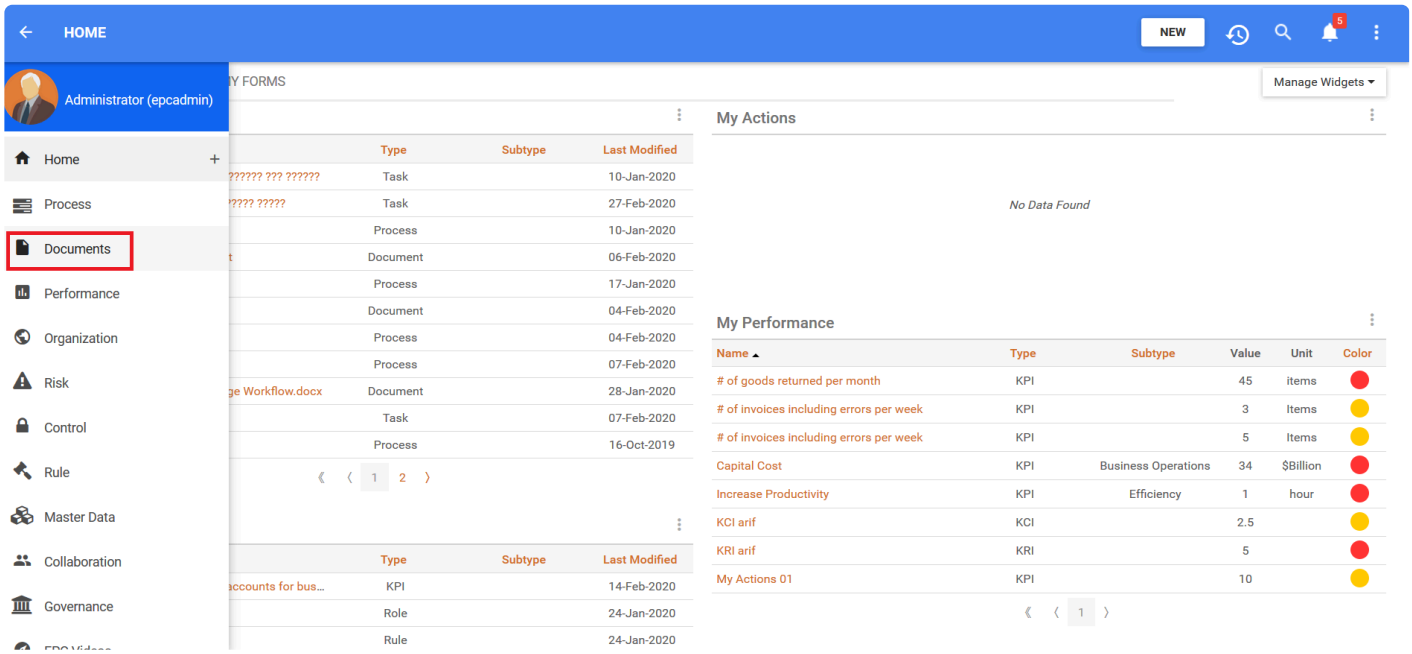

DOCUMENTS
NEW
DEMO
because
Custom Templates
Default template set
DocSetTest OM
HR
Imported Document Set
ladan document set
MR Technologies
Human Resources
new document set for bpca-11875
r-01
Test excel document folder
Test Temp
LIST
GRAPH
DETAILS
New
Edit
Tools
Publish
Human Resources [Draft]
Description
This folder contains all documents concerning HR activities
Properties
Impact

12.1.2.2.2 Create Folders – Object Details Tab

Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

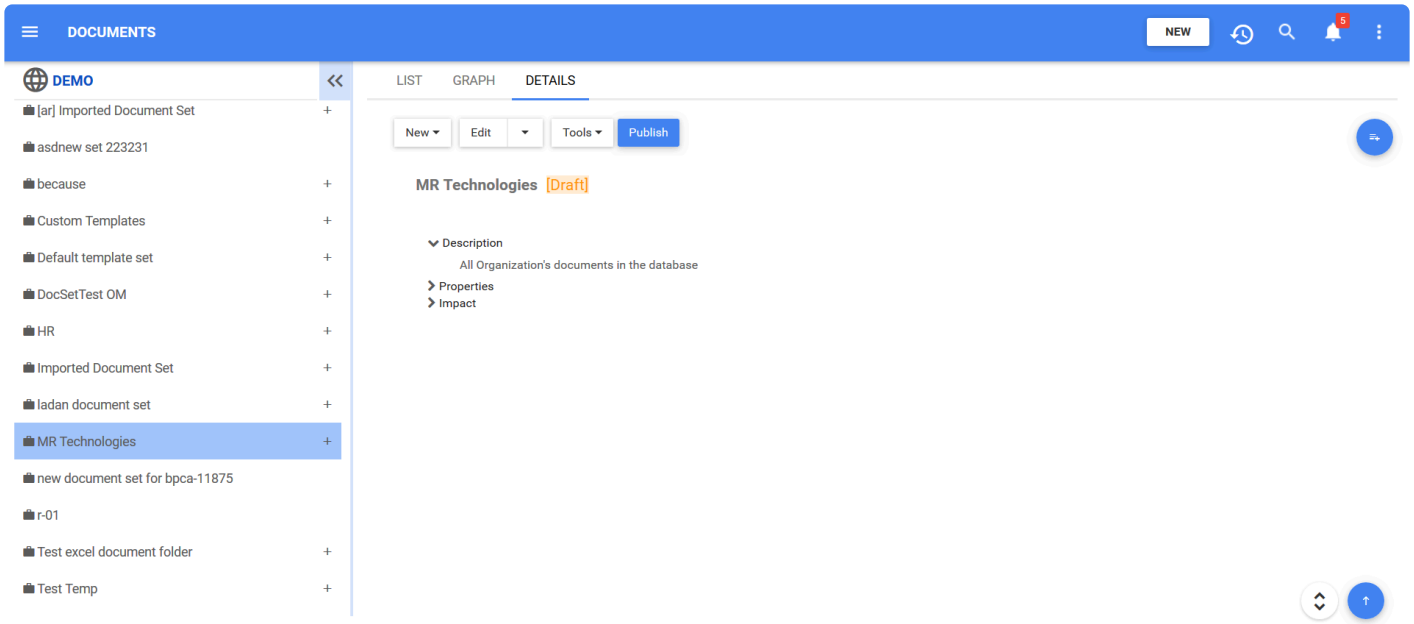
Create a folder from the Details tab of a Set or Folder

1. Click on the Navigation Menu Button on the top left of your screen and navigate to the Module in which you would like to create a folder (in this example, a Document Folder).

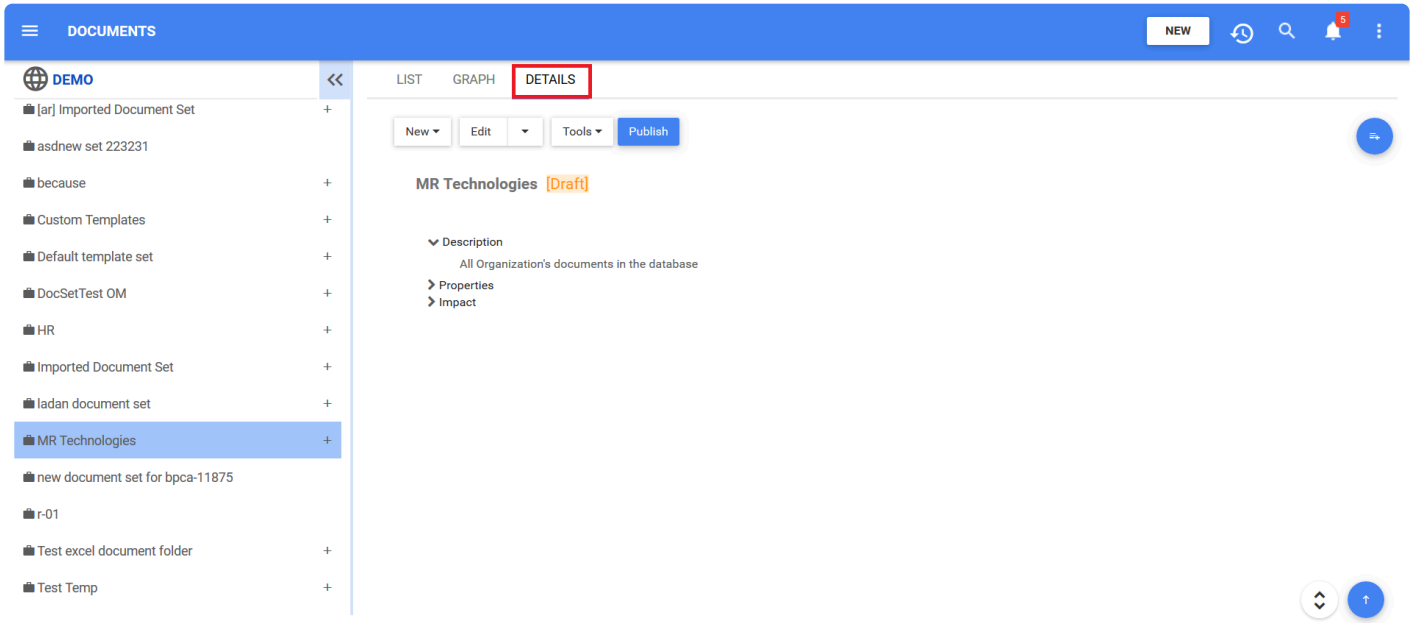


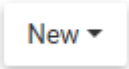
2. Choose the Set or Folder in which you would like to add a the new Folder

It is very important that you select the right parent Set or Folder, since it cannot be modified.

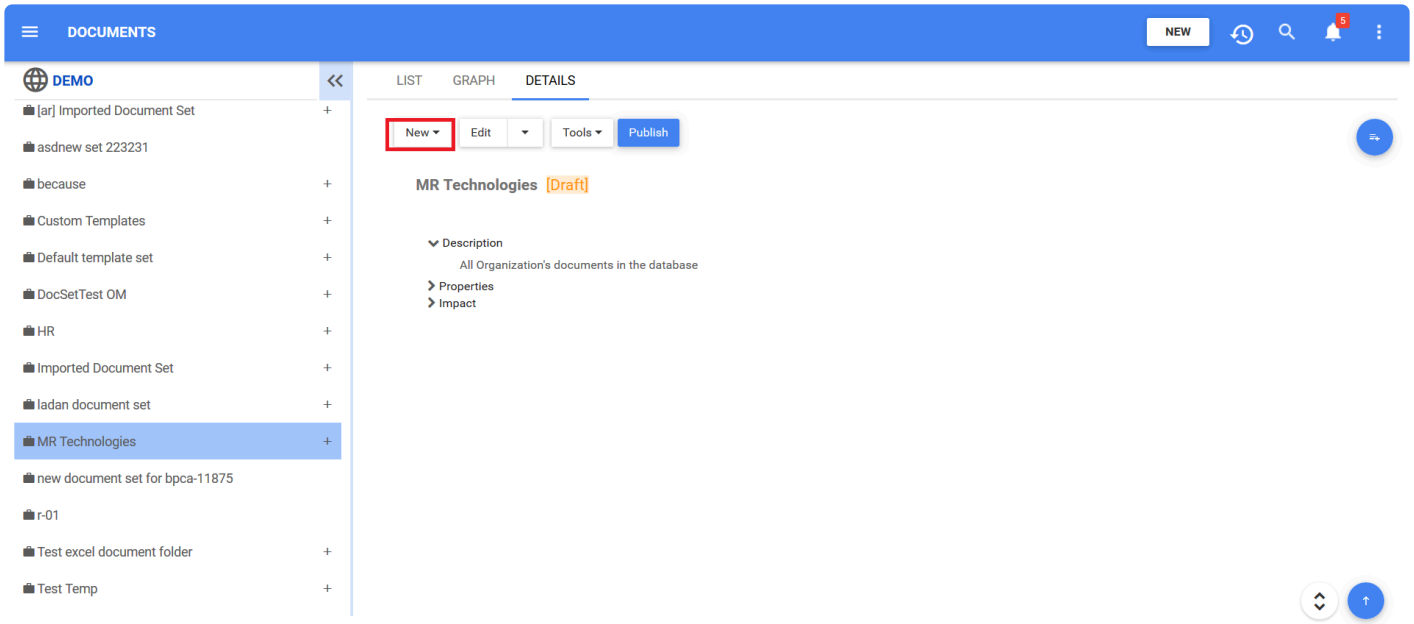


3. Navigate to the Details Page of the Set or Folder in which you want to create a new Folder

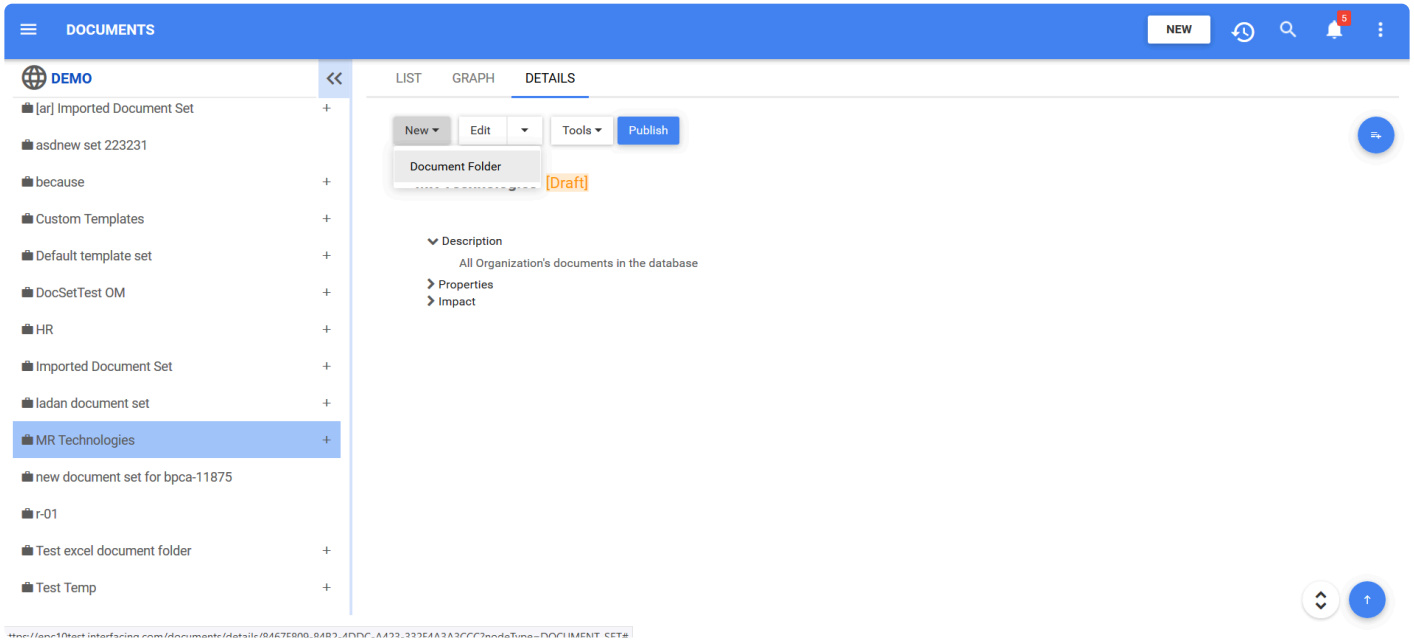


4. Click the 

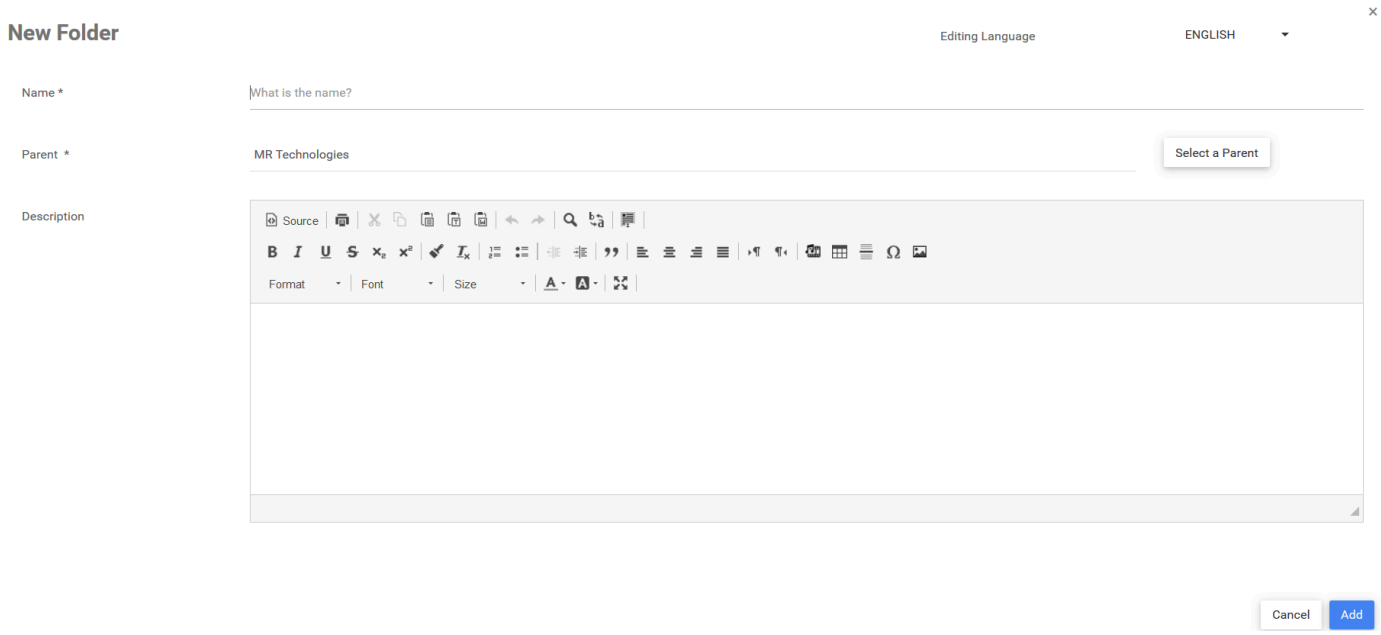
button



5. A drop-down will be generated. To add a new folder, click on the “[Module] Folder” option

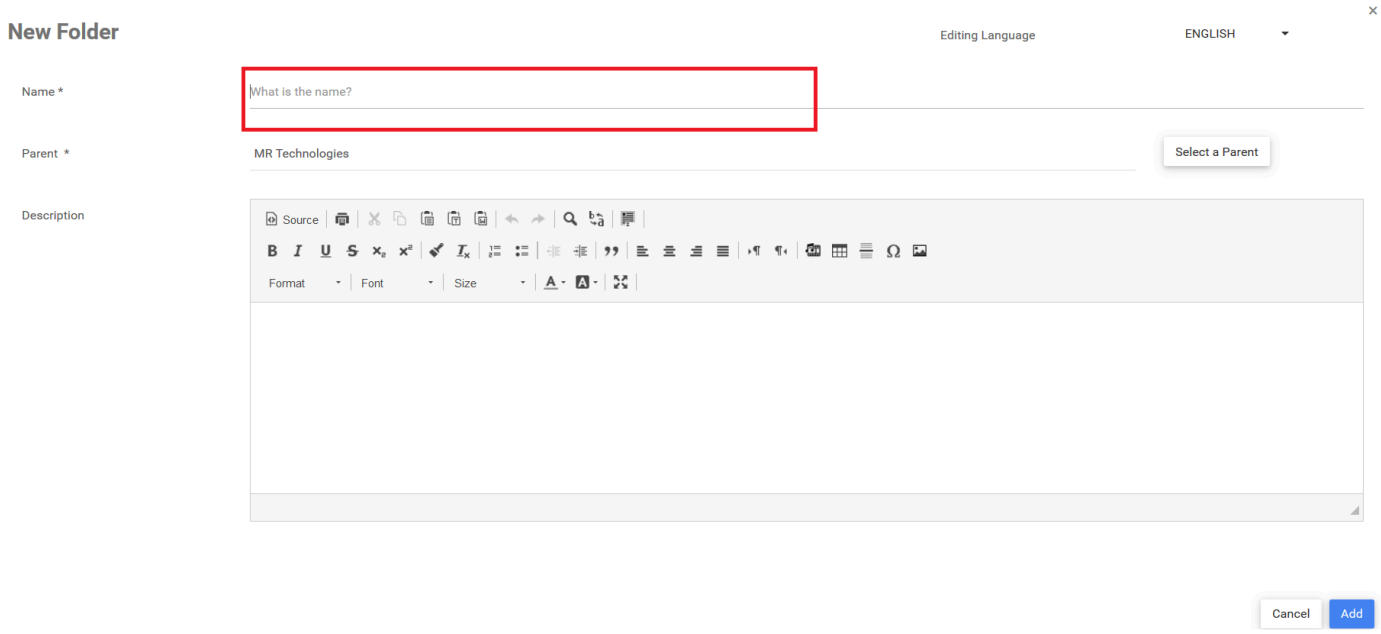


6. A form will be generated where you can input the information about the new Document Folder

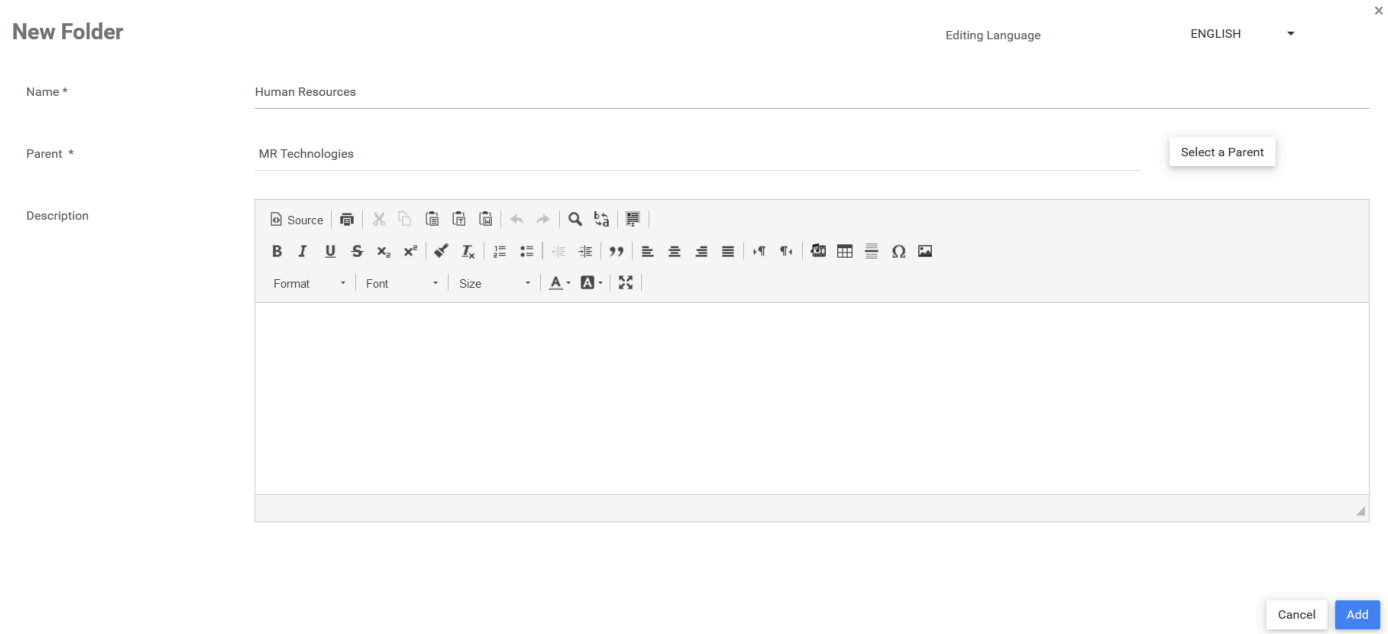


7. Type the name of the Document Folder on the “What is the name?” field

> The Name field is **mandatory** for all objects.



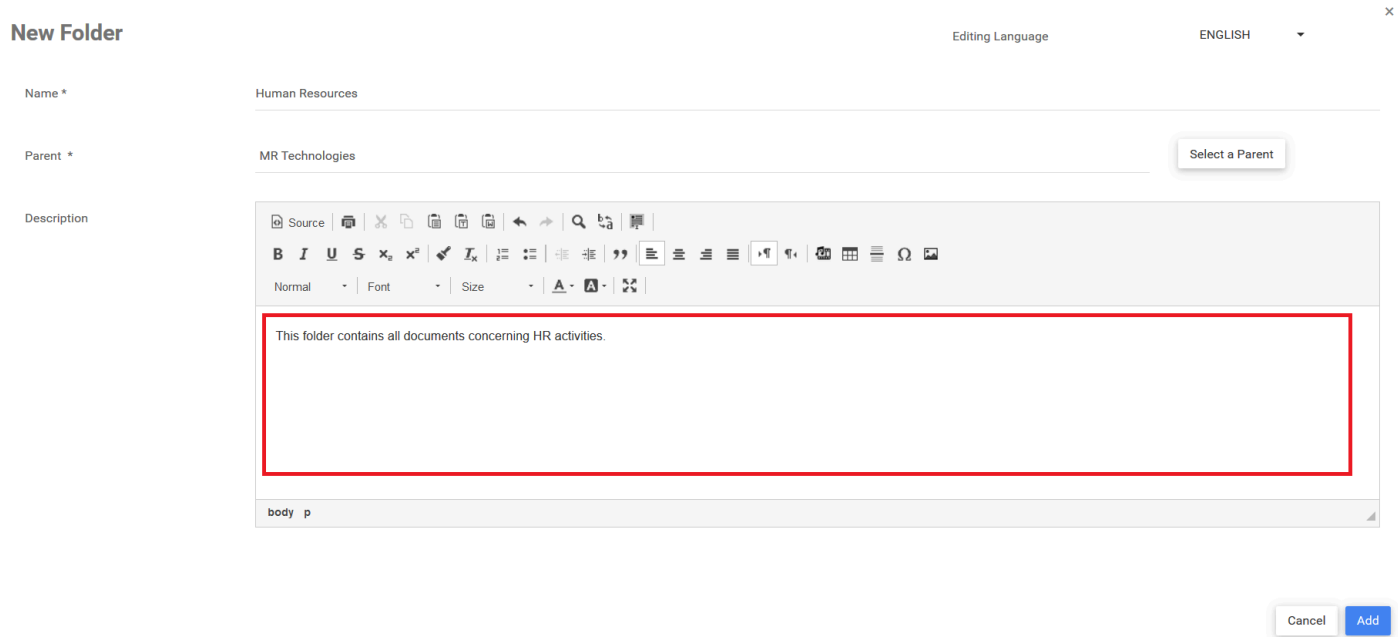
For this example, the name of the Folder is “Human Resources”



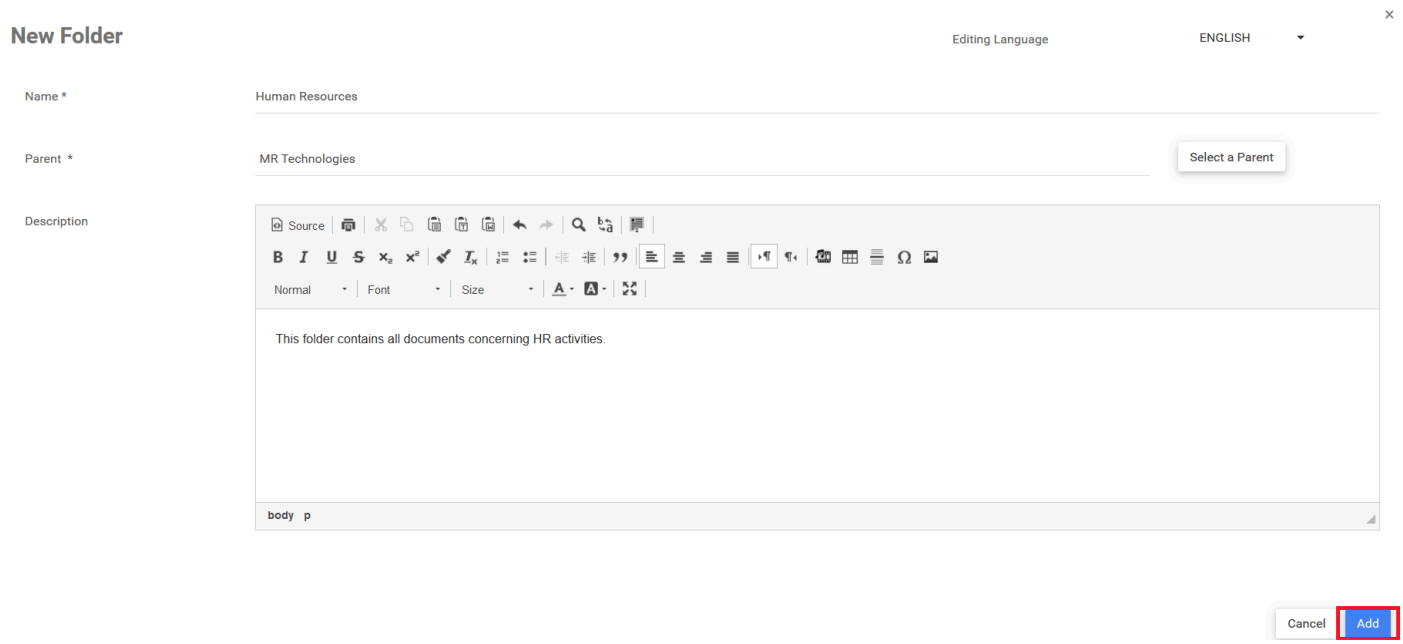
The EPC automatically assigns the Document Folder to the Parent, which is the Document Set. The Parent box is blocked and cannot be edited. The Parent field is blocked and cannot be edited.

8. Type the description of the Folder on the Description field

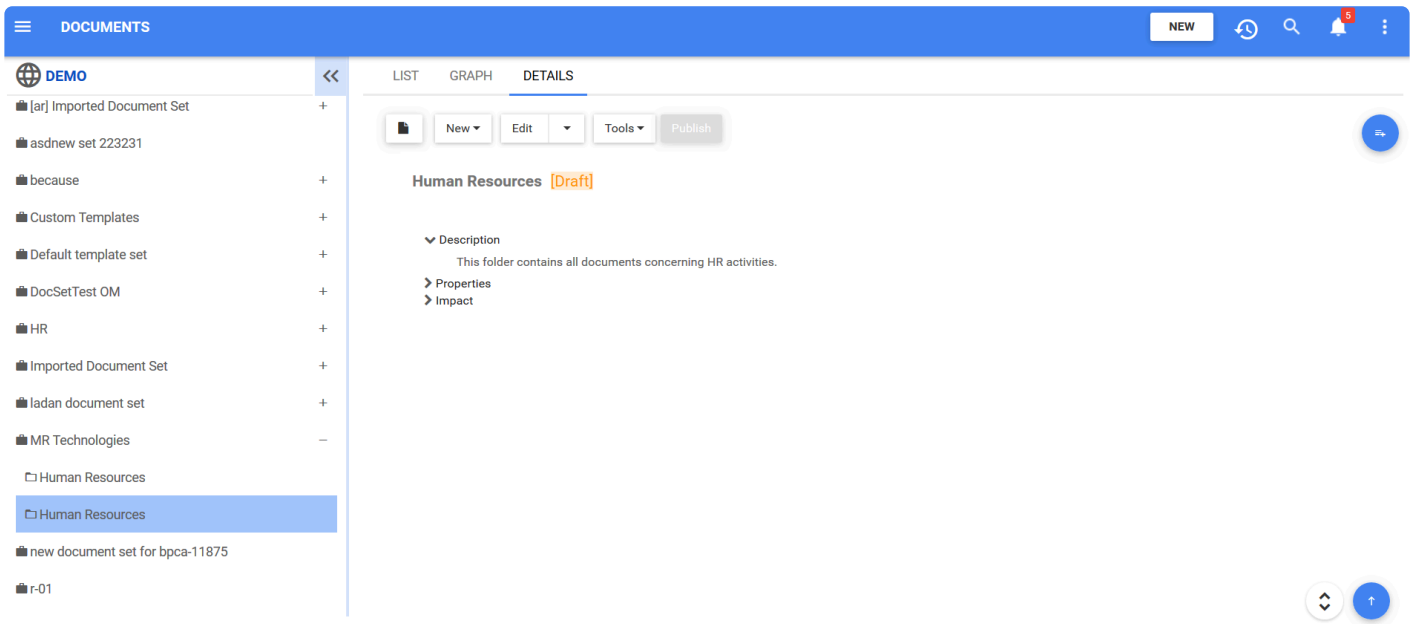
This field is not mandatory, but it is recommended to input a description



9. Click on the Add button to finish the creation of the new Folder



10. The new Document Folder “Human Resources” is now on the Document tree structure. This folder is currently a draft. To learn how to publish Document objects, click here.



12.1.2.3 Create Objects

! Due to their different nature and complexity, you can find a separate instructions section to Create Process Objects

There are two ways to create objects

1. Via the "New" button on the top-right of the EPC WebApp
2. Via the Object Details Tab of a Parent Object (see table above for Object-Parent relationship).

12.1.2.3.1 Create Objects – New Button

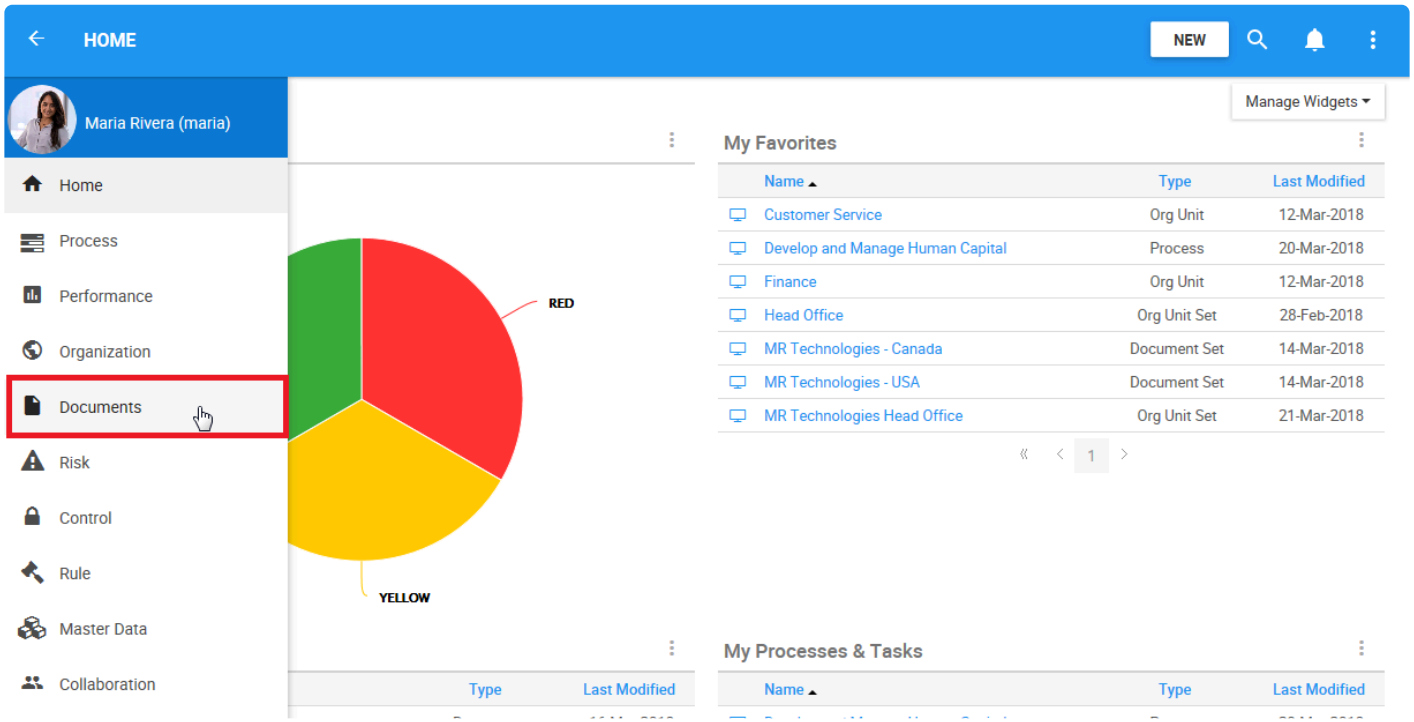
Web Modelers can create objects in the WebApp and organize them in a hierarchical manner in a “Parent-Child” relationship. See the table in the Create section which lists the Parent-Child relationships per object.

> ! Due to their different nature and complexity, you can find a separate instructions section to Create Process Objects

Create an object via the “New” button on the top-right of the WebApp

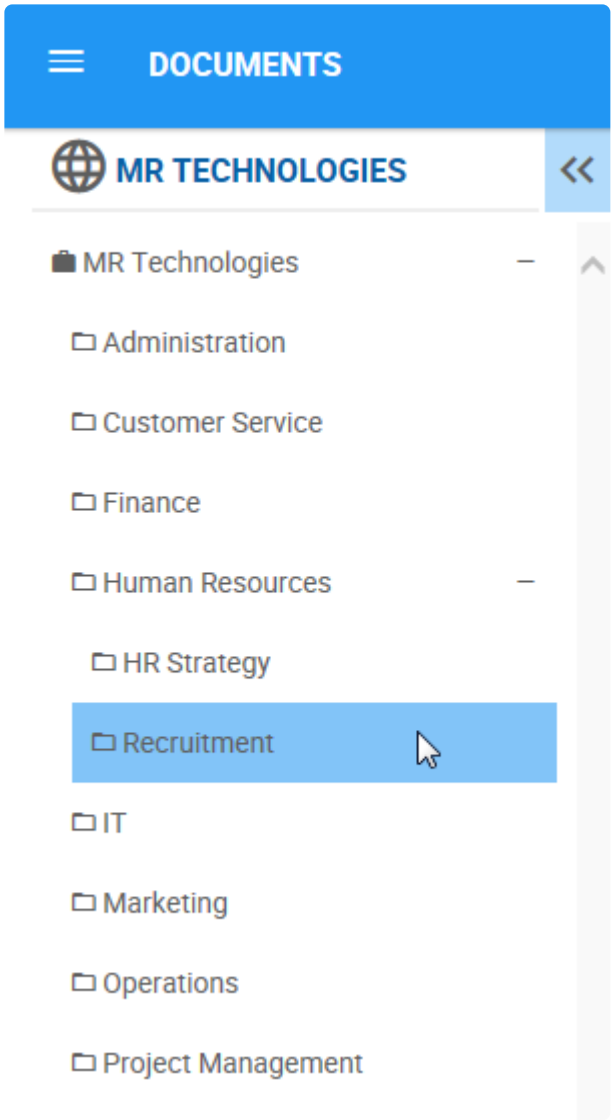
1. Click on the Navigation Menu Button on the top-left of your screen and navigate to the desired Module (for this example, the a document will be created under a parent folder)

> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

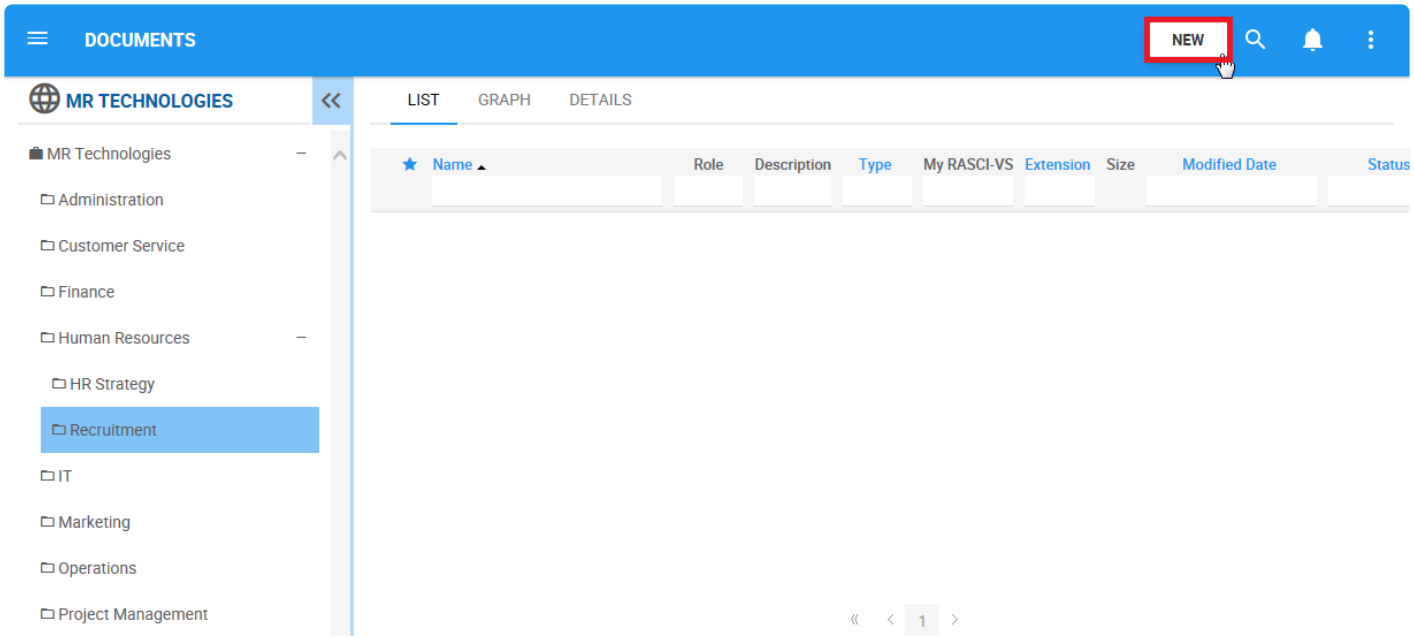


2. Choose the parent object under which you would like to add the object. (for this example, we are choosing the folder “Recruitment” under “Human Resources” folder in the tree structure.)

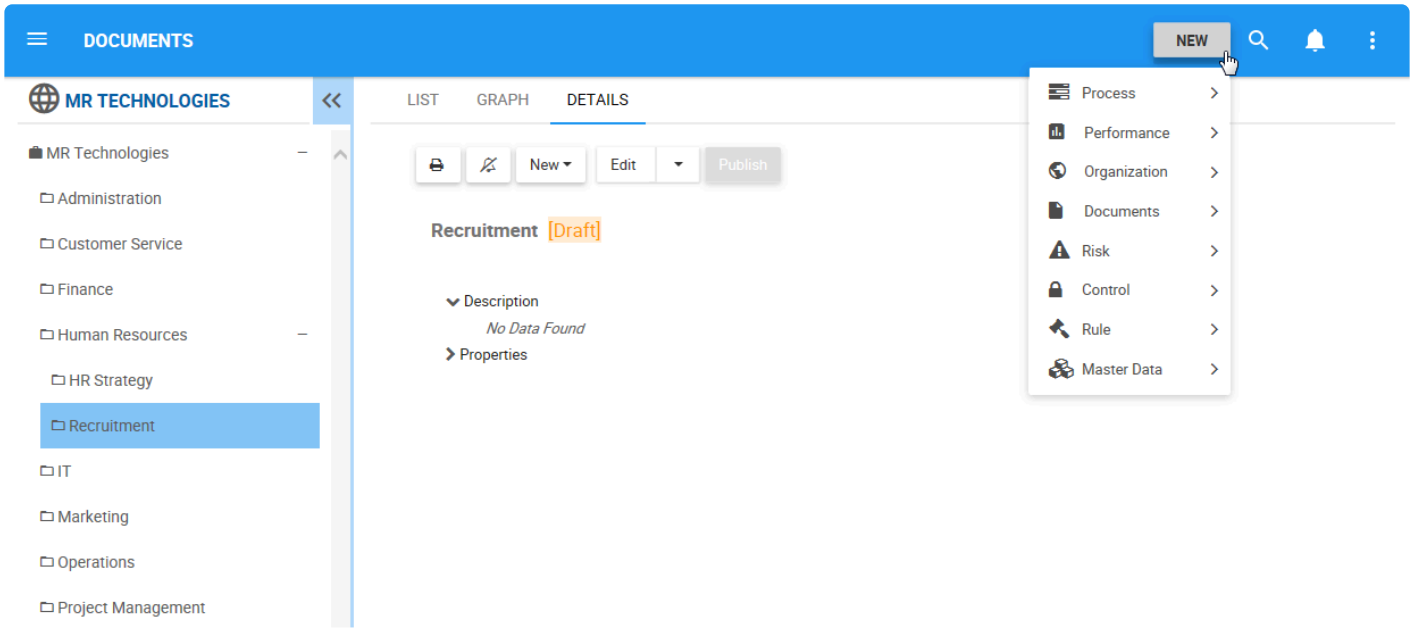
> It is very important that you select the right parent Set or Folder, since it cannot be modified.



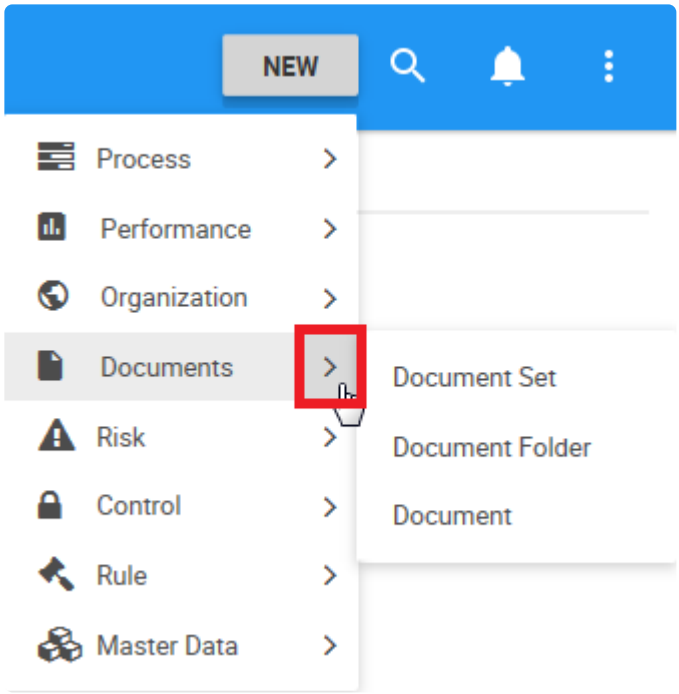
3. Navigate to the NEW button on the top-right of the EPC WebApp page.



4. After clicking on the NEW button, a drop-down menu will appear with all the modules of the EPC where a new object can be created.

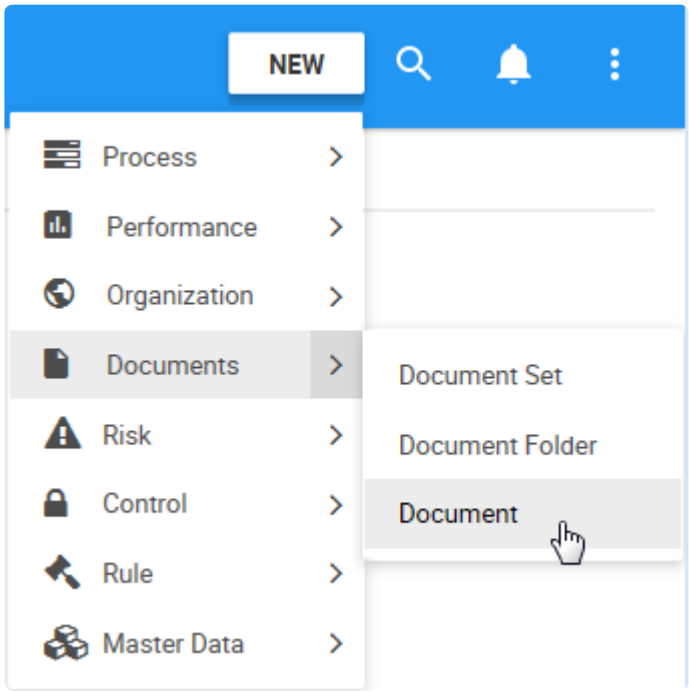


5. Navigate to the desired Module and click on the > icon. Another drop-down menu will appear with the different objects that can be created within the relevant Module.



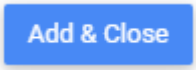
6. Click on the object type you would like to create.

> Recall the parent-child relationship requirements when selecting the object type. See the parent-child relationship table in the Create section.



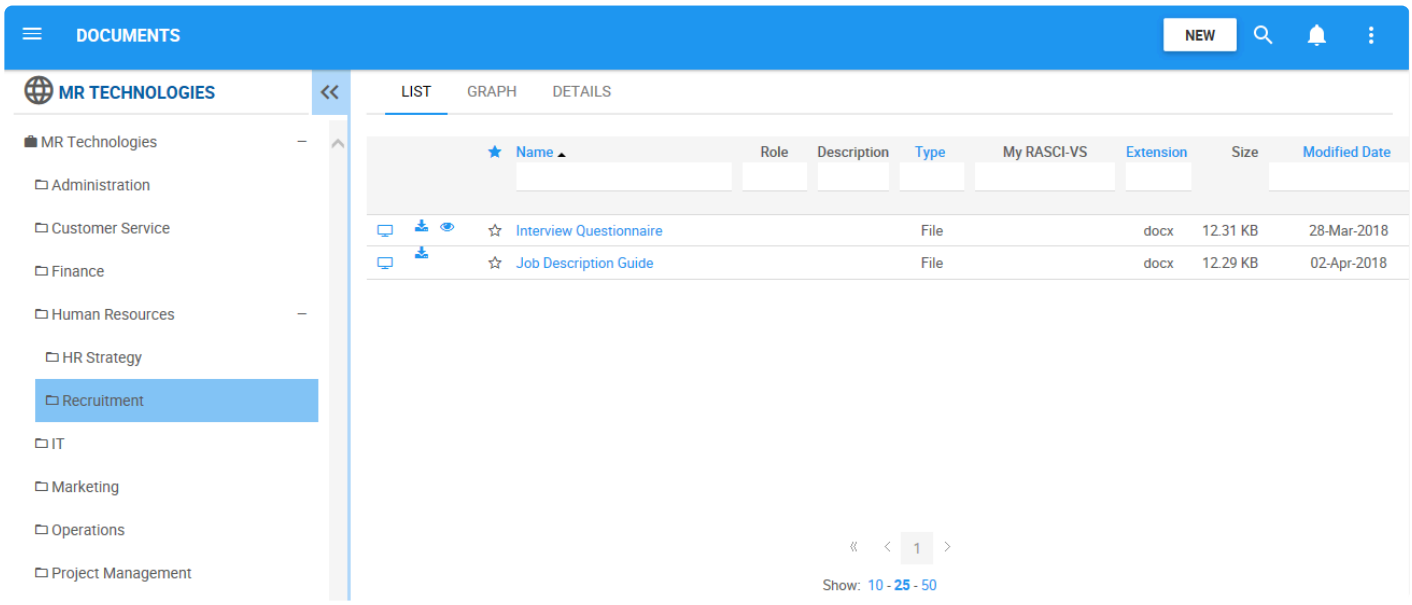
7. A form will be generated where you can input the information about the new object. See below for links to object-specific instructions to create object content.

- Input Performance objects information
- Input Organization objects information
- Input Documents objects information
- Input Risk objects information
- Input Control objects information
- Input Rule objects information

8. Click on the 

button to finish the creation of the new object

9. The new Document is now on the Document tree structure. This document is currently a draft. To learn how to publish Document objects, click here.



12.1.2.3.2 Create Objects – Object Details Tab

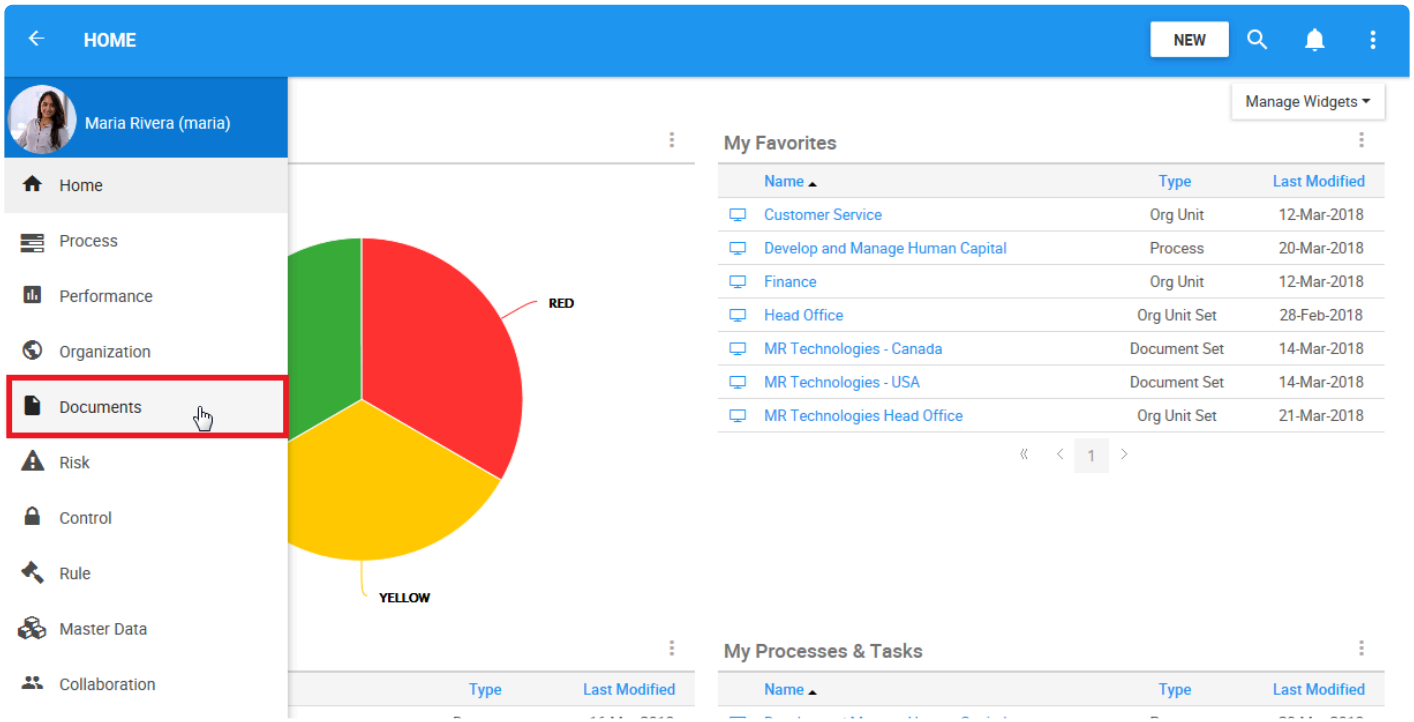
Web Modelers can create objects in the WebApp and organize them in a hierarchical manner in a “Parent-Child” relationship. See the table in the Create section which lists the Parent-Child relationships per object.

> ! Due to their different nature and complexity, you can find a separate instructions section to Create Process Objects

Create an object via the Details Tab of a parent object

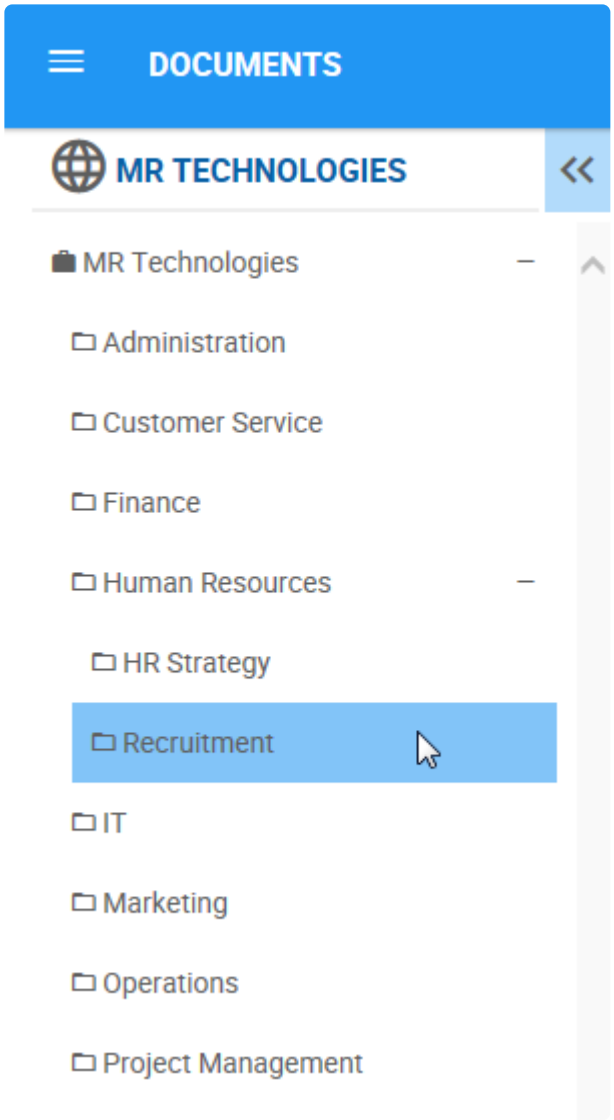
1. Click on the Navigation Menu Button on the top left of your screen and navigate to the desired Module (for this example, the a document will be created under a parent folder)

> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

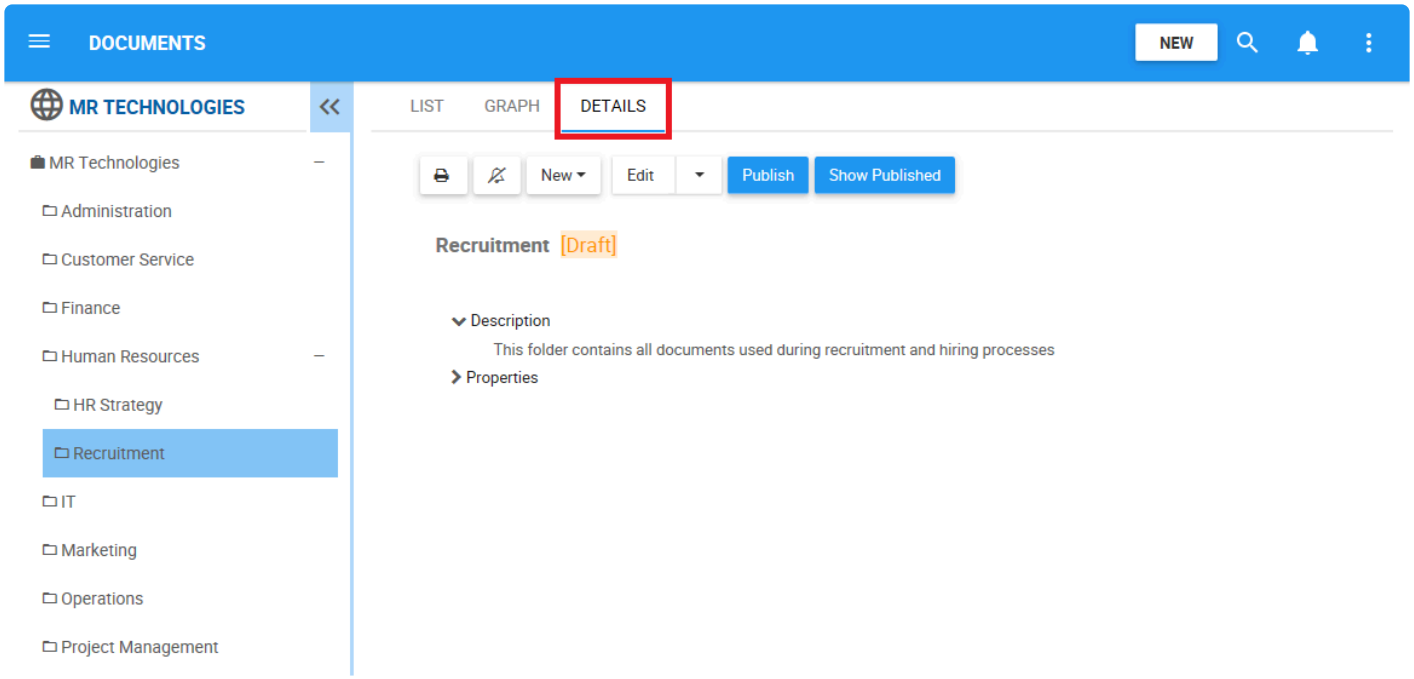


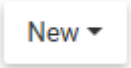
2. Choose the parent object under which you would like to add the object. (for this example, we are choosing the folder “Recruitment” under “Human Resources” folder in the tree structure)

> It is very important that you select the right parent Set or Folder, since it cannot be modified.

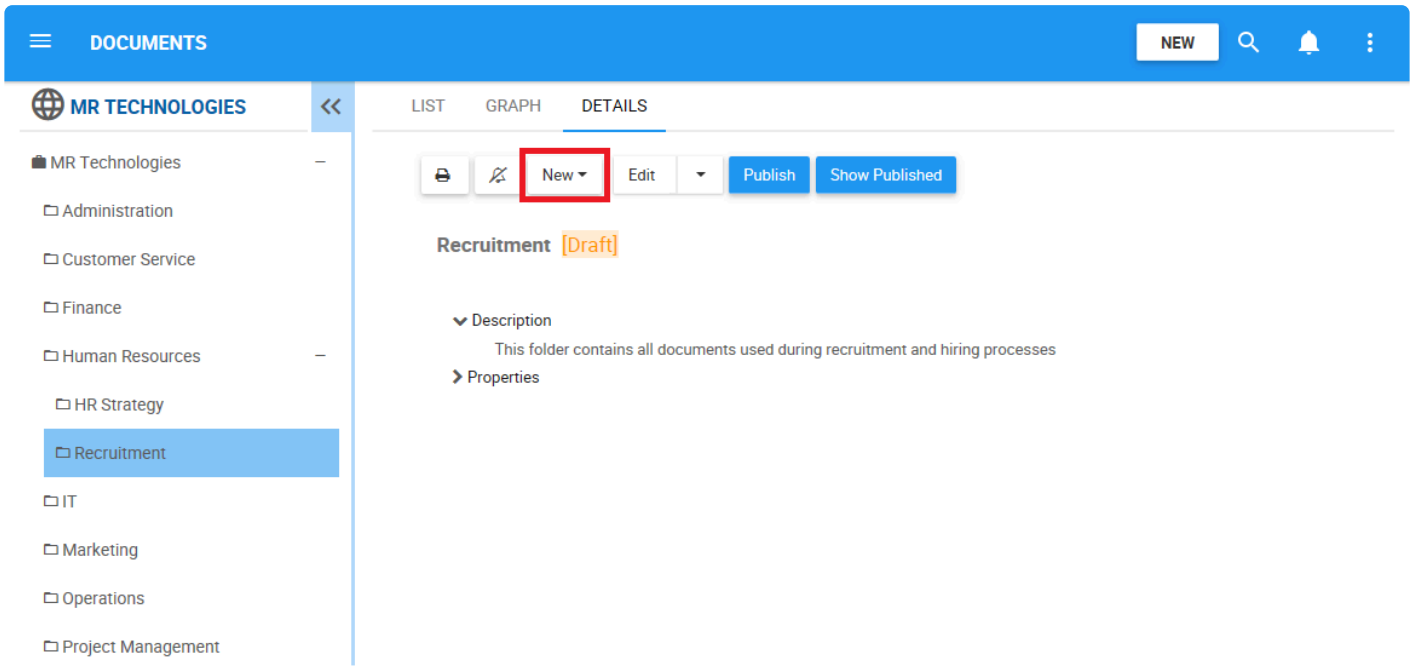


3. Navigate to the Details Page of the parent object

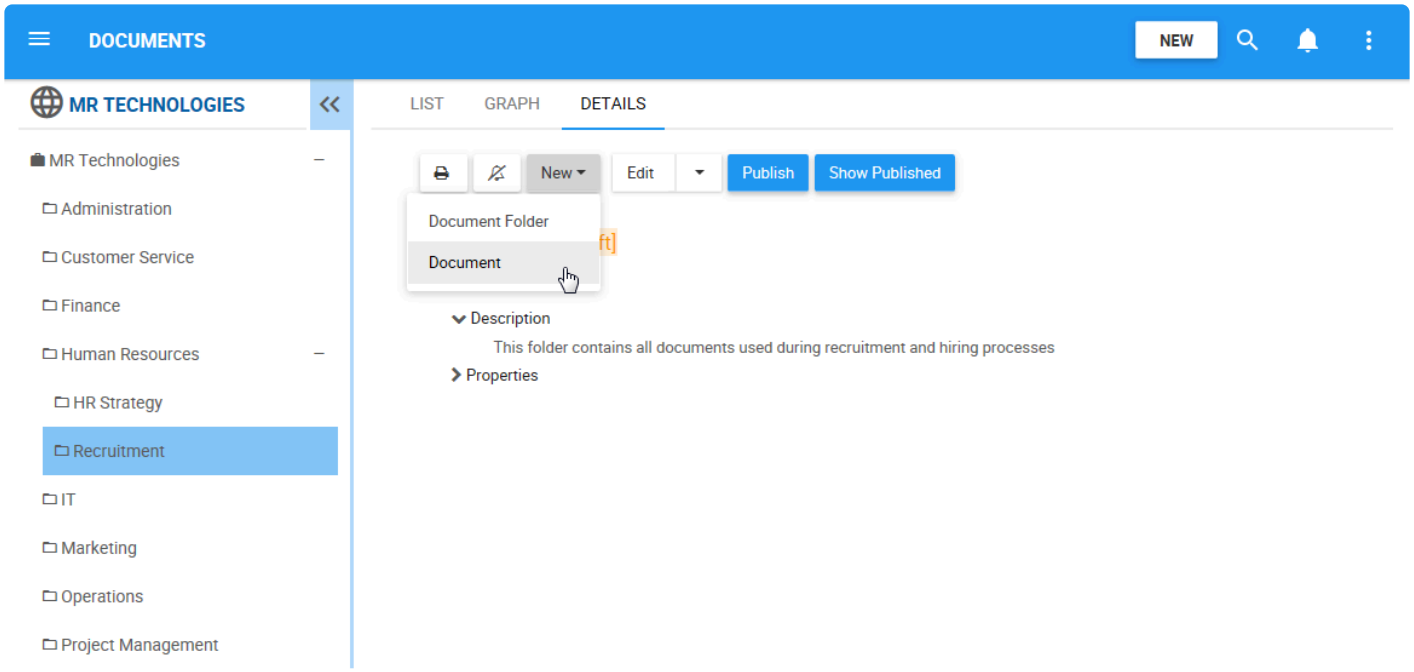


4. Navigate to the 

button

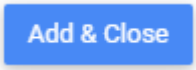


5. A drop-down will be generated. Select the object type you would like to create.



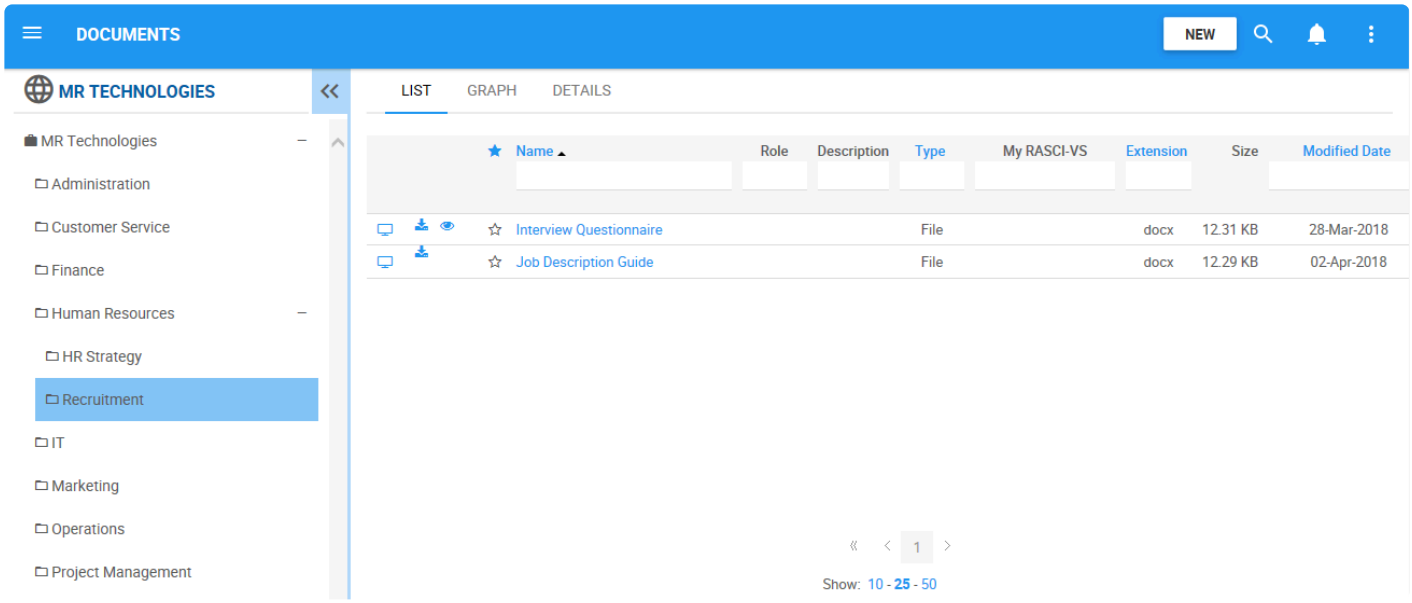
6. A form will be generated where you can input the information about the new object. See below for links to object-specific instructions to create object content.

- Input Performance objects information
- Input Organization objects information
- Input Documents objects information
- Input Risk objects information
- Input Control objects information
- Input Rule objects information

7. Click on the 

button to finish the creation of the new object

8. The new Document is now on the Document tree structure. This document is currently a draft. To learn how to publish Document objects, click here.


DOCUMENTS
NEW
MR TECHNOLOGIES
LIST
GRAPH
DETAILS
MR Technologies
Administration
Customer Service
Finance
Human Resources
HR Strategy
Recruitment
IT
Marketing
Operations
Project Management
Name
Role
Description
Type
My RASCI-VS
Extension
Size
Modified Date
Interview Questionnaire
File
docx
12.31 KB
28-Mar-2018
Job Description Guide
File
docx
12.29 KB
02-Apr-2018
1
Show: 10 - 25 - 50

12.1.3 Edit Toolbar

Web Modelers can view and use the Edit Toolbar if they have the permission to be a Web Modeler, their displayed content is set to Show Latest, their editing tool is the Web and they have the security permission on the object.

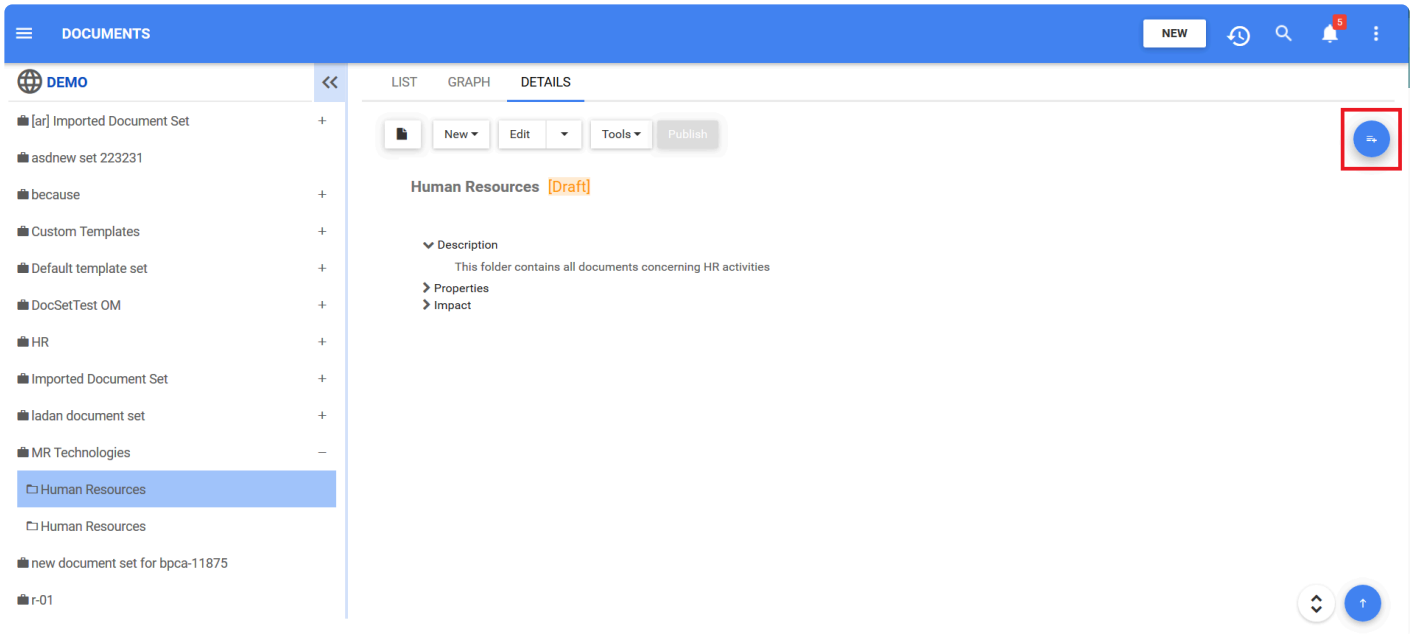
The boxes on the Edit Toolbar are the following:

1. Print
2. Subscribe
3. New
4. Edit
5. Approval
6. Security
7. Move
8. Delete
9. Publish
10. Displayed Content

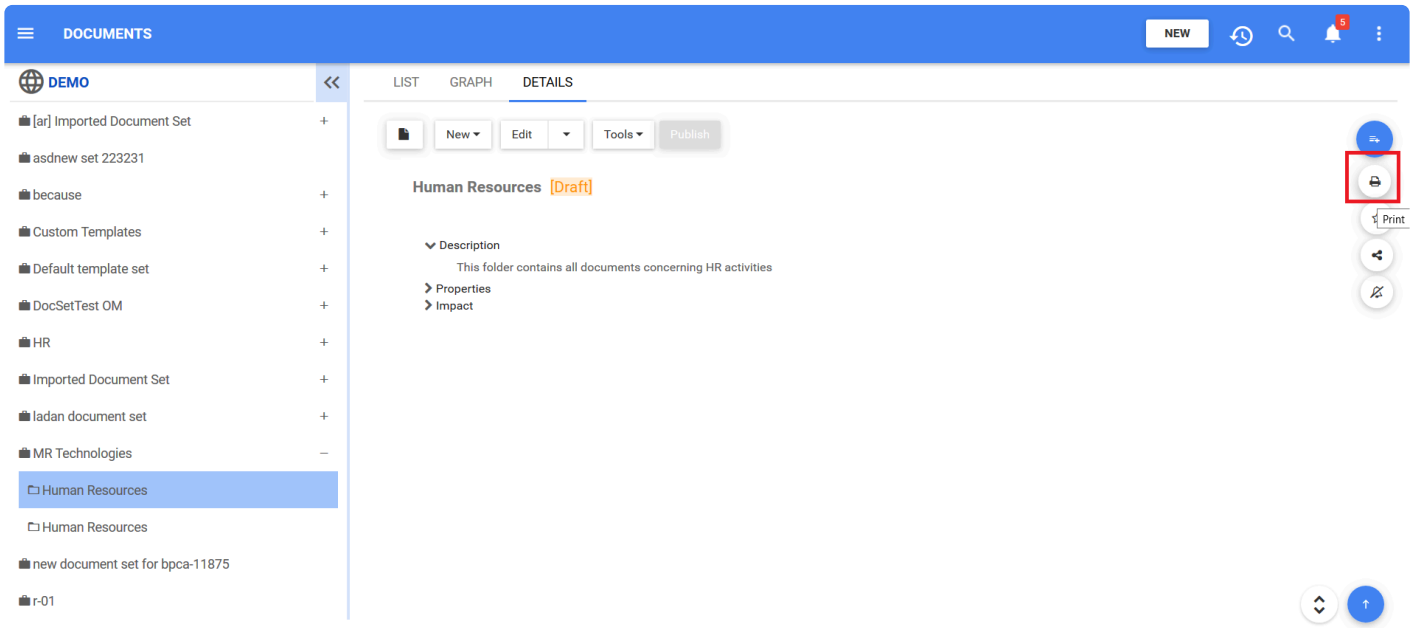
12.1.3.1 Print

The print button allows Web- Modelers 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.

On the right hand side, click and expand the ‘Open Button Menu’



From the expanded icons, choose PRINT.

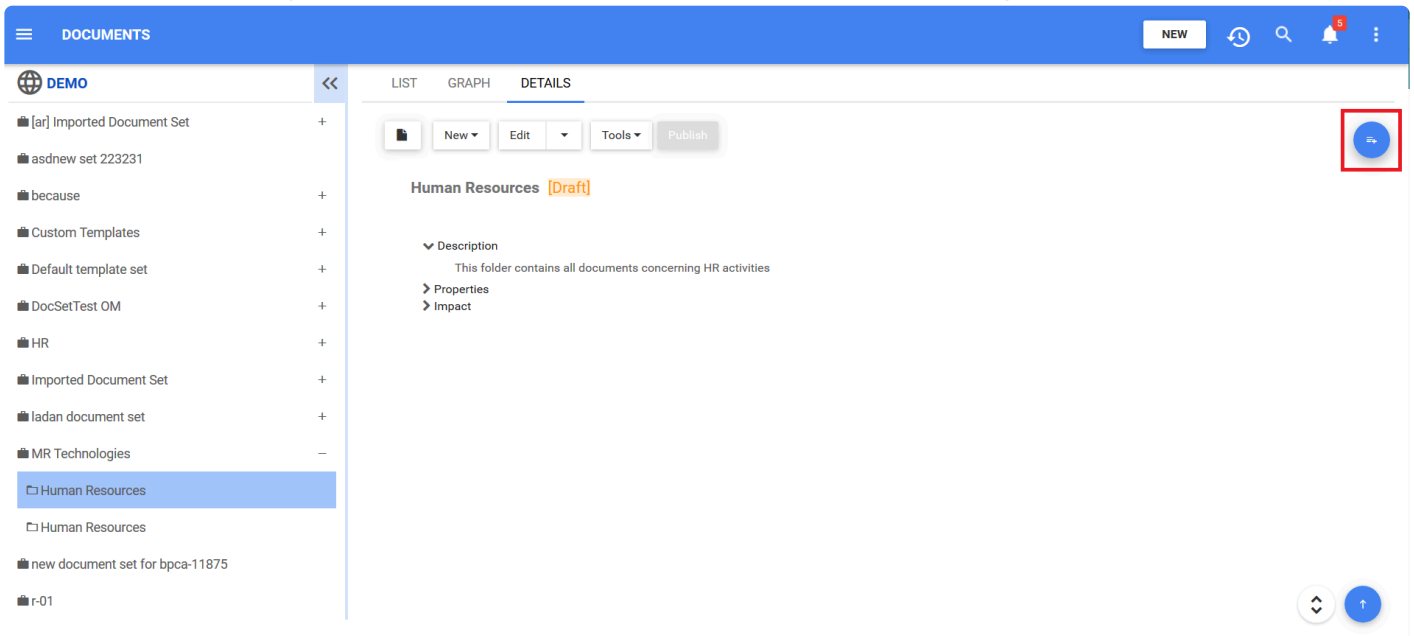


12.1.3.2 Subscribe

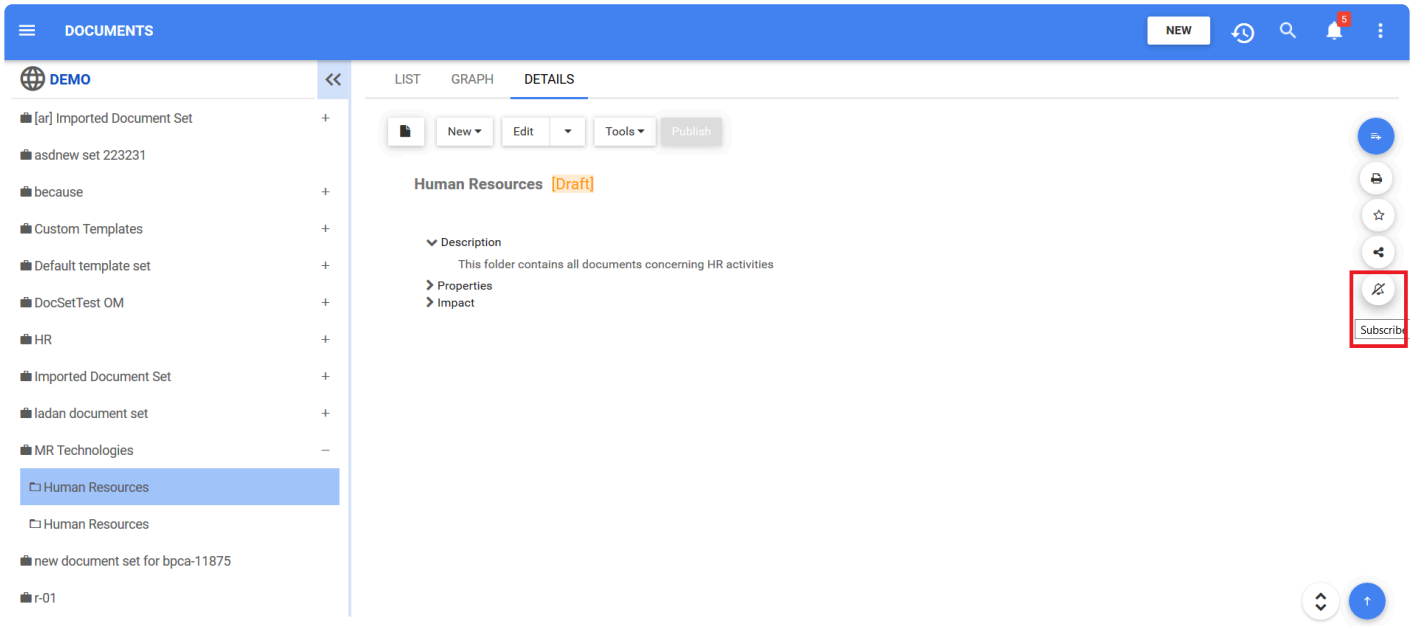
The subscribe function, symbolized by the icon, has been added to allow Web Modelers to track objects in the EPC. By subscribing to objects, Web Modelers will receive notifications when objects are altered or optimized.

The Subscribe button is available for **all objects** on the toolbar under their Details tab.

To Subscribe to an object, expand the OPEN BUTTON MENU from the top-right.



Then, click on the SUBSCRIBE button.



12.1.3.3 New

The New button enables Web Modelers to create new objects on the EPC Web App.

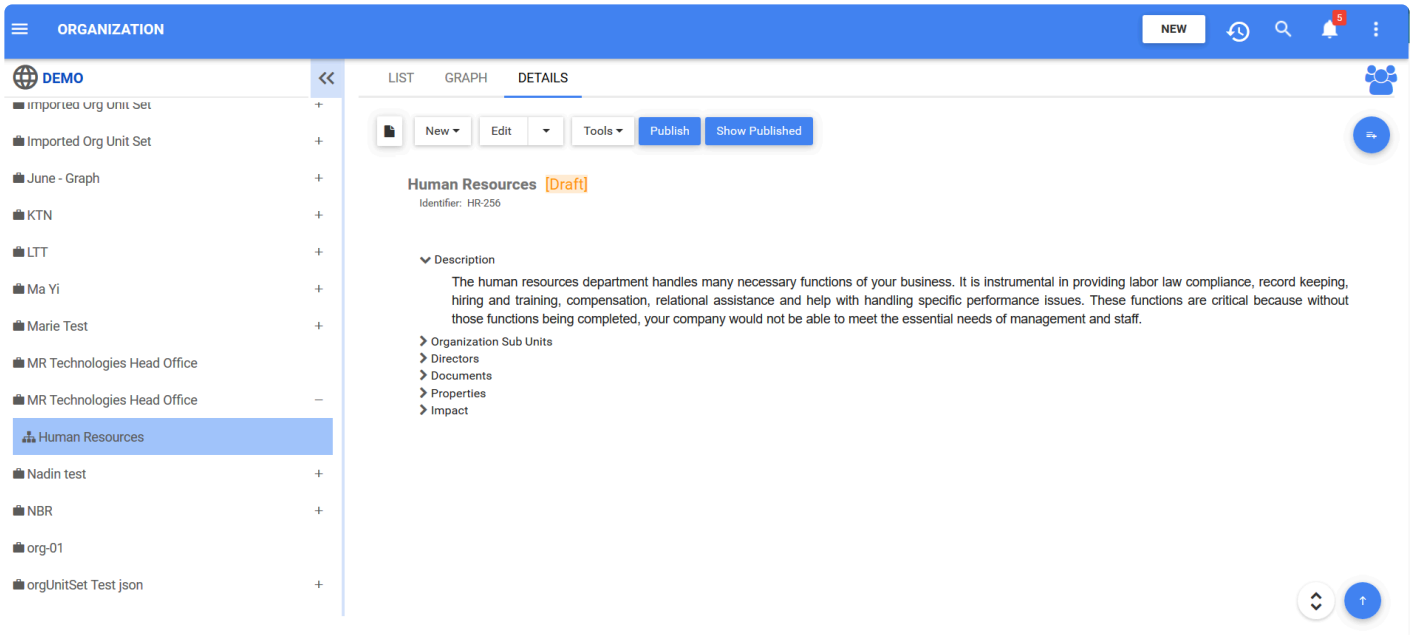
Web Modelers need to ensure they have the permission to be a Web Modeler, their displayed content is set to Show Latest, and their editing tool is the Web.

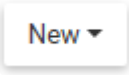
The New button is available in the Details tab of:

- Sets
- Folders
- Processes
- Objectives
- Units

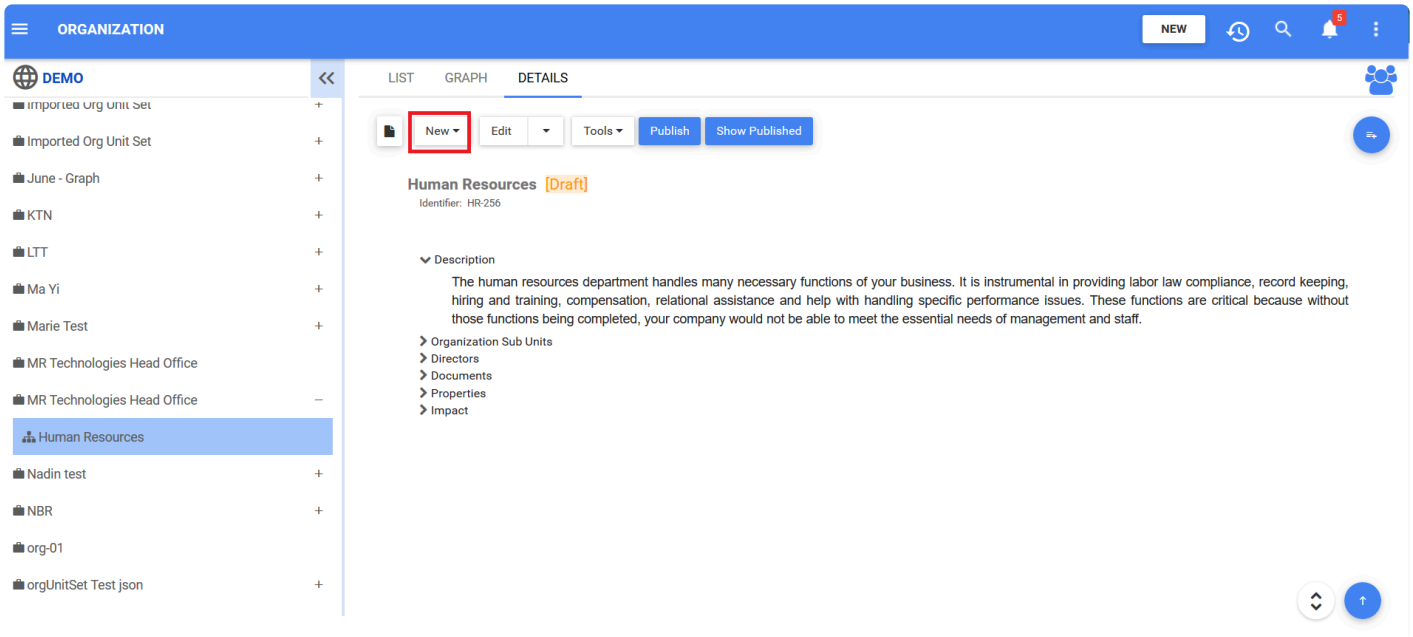
Follow the instructions to access the New button

1. Navigate to the details section. In this example, an Organization Unit

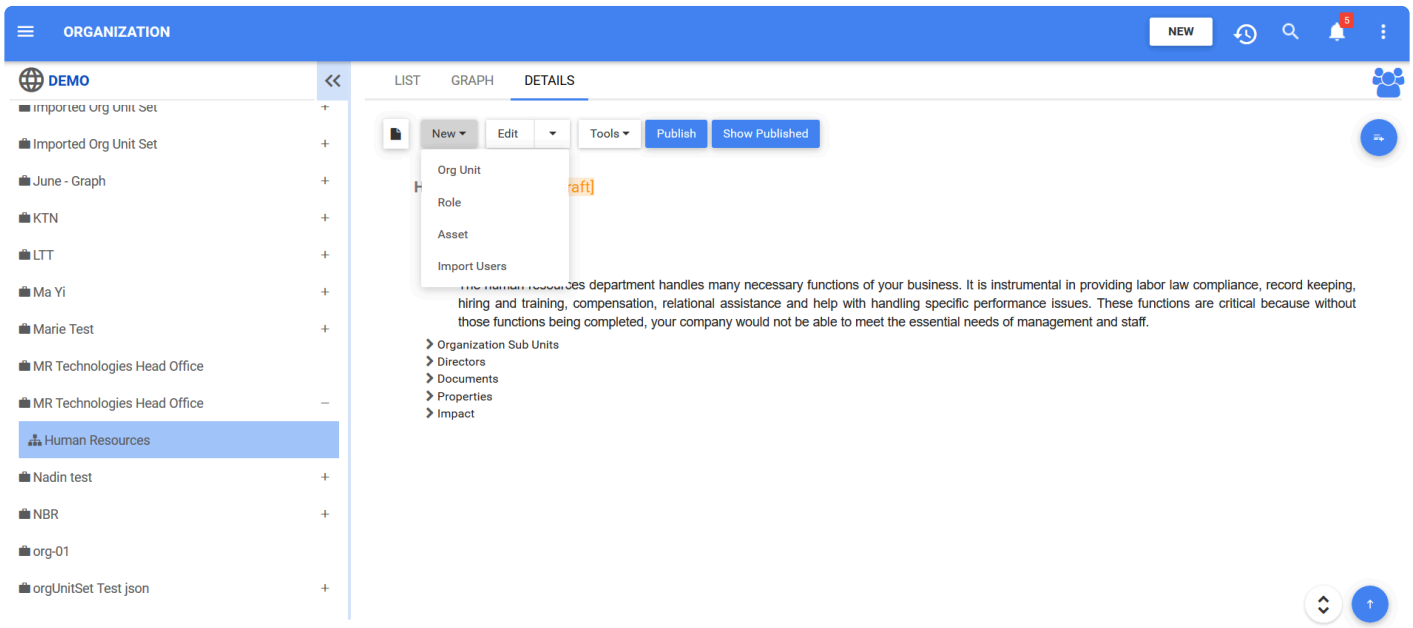


2. Navigate to the 

box



3. A drop-down will be generated where you can choose the new item you want to create. In this example, the drop-down will show all the objects that can be created within an Organization Unit.



You can find direct links to instructions to use the New button in every module:

- Create Process Objects
- Create Performance Objects
- Create Organization Objects
- Create Document Objects
- Create Risk Objects
- Create Control Objects
- Create Rule Objects

Lock

For all Modules except the Process Module, creating new content under a parent that is being edited is not prevented. The user won’t receive a lock error message.

12.1.3.4 Edit

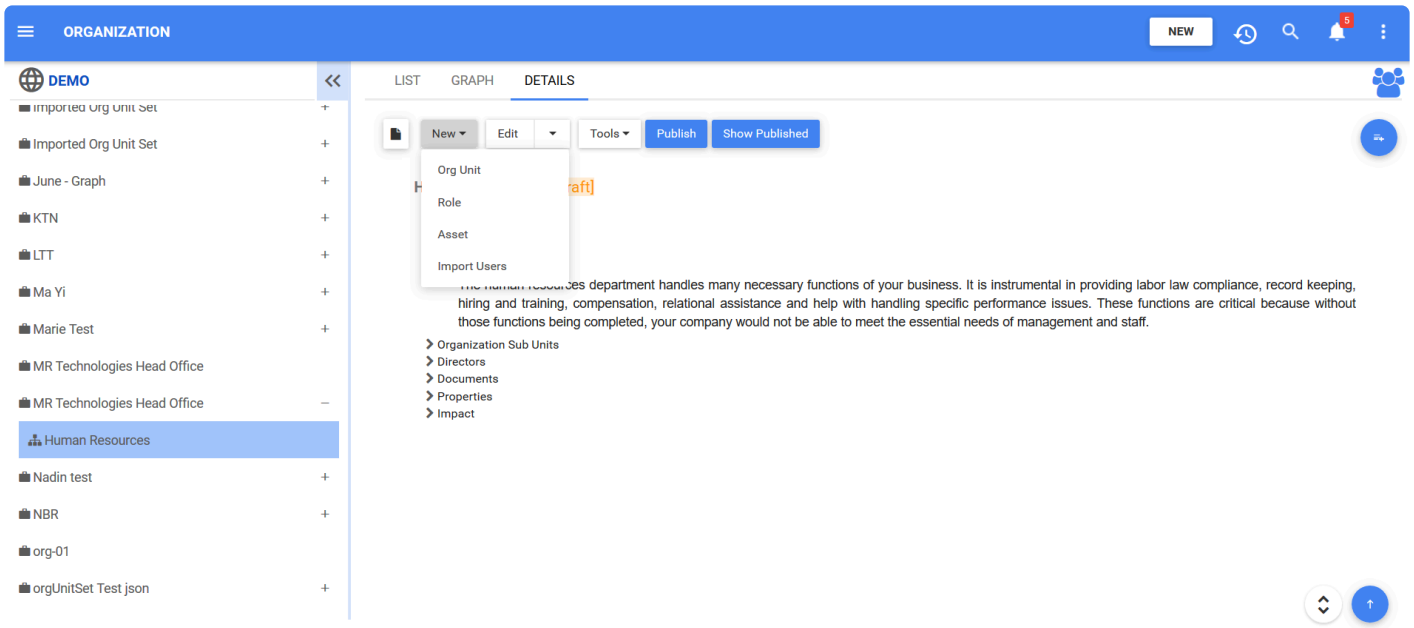
The Edit button enables Web Modelers to edit objects on the EPC Web App. When navigating to the Edit button, Web Modelers will be redirected to the Edit Details window for the object

Web Modelers need to ensure they have the permission to be a Web Modeler, their displayed content is set to Show Latest, and their editing tool is the Web.

The Edit button is available in **all objects** on the toolbar under their Details tab.

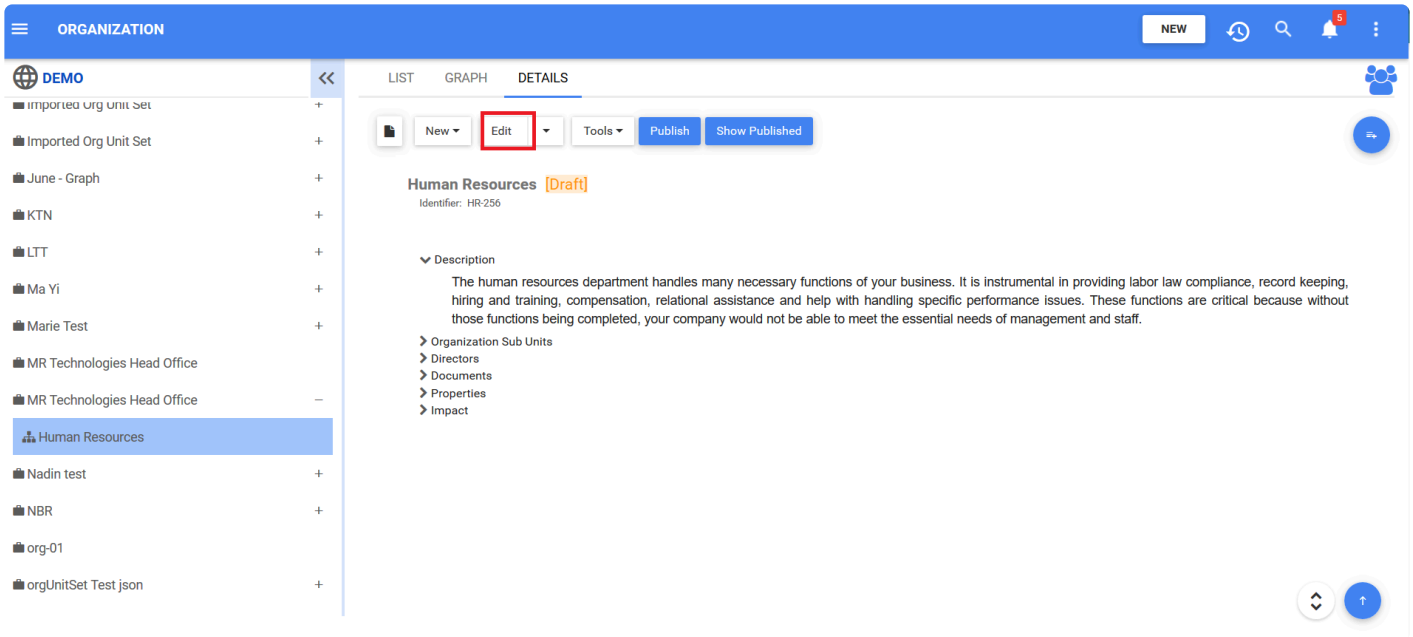
Follow the instructions to access the Edit button

1. Navigate to the details section. In this example, an Organization Unit

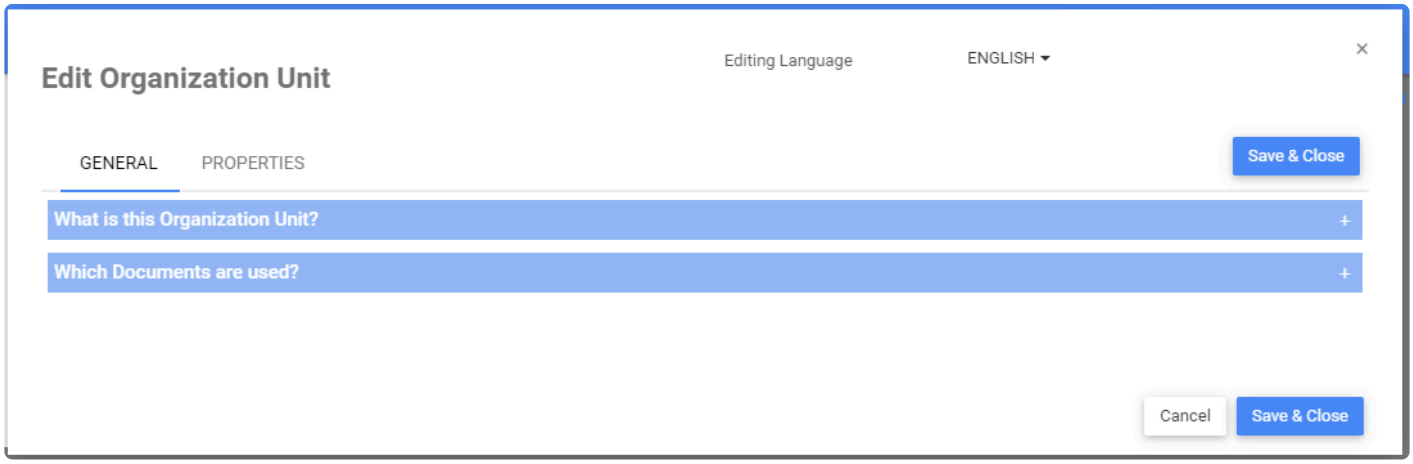


2. Navigate to the

box



3. You will be redirected to the Edit Details window of the object



You can find direct links to instructions to Edit Objects:

- Edit Process Objects
- Edit Performance Objects
- Edit Organization Objects
- Edit Document Objects
- Edit Risk Objects
- Edit Control Objects
- Edit Rule Objects

Lock

For all modules, trying to edit an object that is being edited by another user is prevented. The user will receive a lock error message. An example of a message is given is the Edit Lock page.

For the Process Module more specifically, the lock applies simultaneously on the Process Graph Editing and the Process Details Editing. More details are given in the links.

12.1.3.5 Approval

Approval cycles often involve multiple individuals before changes can be implemented. This is often the case as business activities that are subject to change may affect multiple different roles and resources, requiring their consent prior to change. These approval cycles can vary dependent on the organization, and the importance of the request being made. As such, the EPC supports both parallel and serial approval cycles.

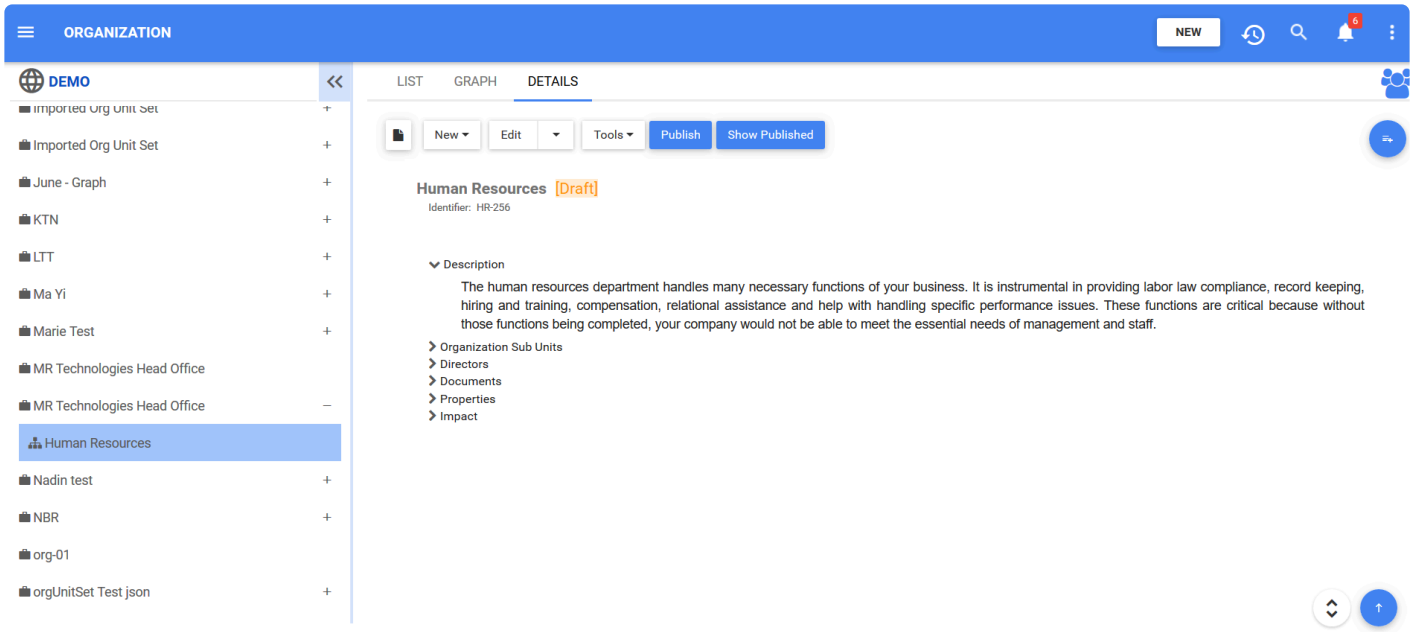
Approval Cycle	Description
Parallel	All approval requests are simultaneously sent to approvers. The changes will be approved once all approvers have approved. E.g. A request for approval is sent out to a controller, the VP Finance, and the CEO simultaneously
Serial	Approval cycle following a sequential of approvers. Approval requests are first sent to the initial approver. Upon approval, a secondary approval request will be sent to the following approver and so on. E.g. First approval request sent to a controller, then the VP Finance and finally the CEO.

Web Modelers can set an approval cycle for **all EPC objects.** The Approval button is available on the toolbar under the object's Details tab.

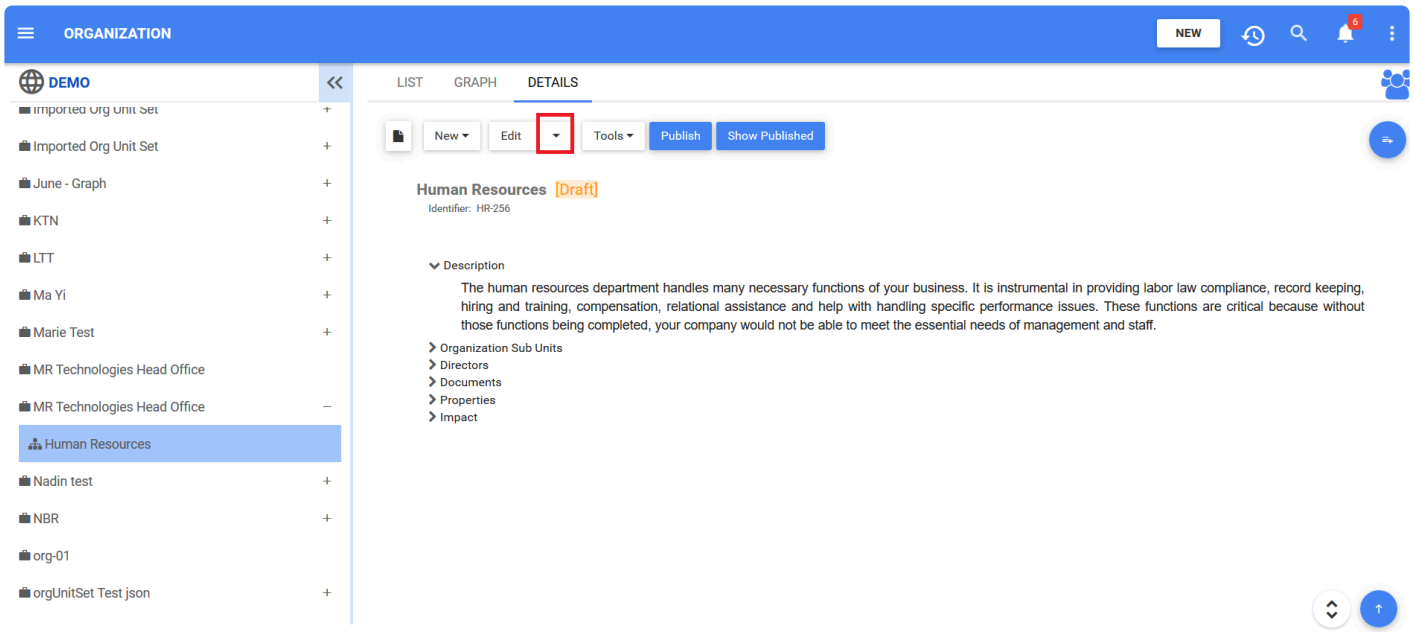
Web Modelers need to ensure they have the permission to be a Web Modeler, their displayed content is set to Show Latest, and their editing tool is the Web.

Follow the instructions to set an Approval Cycle

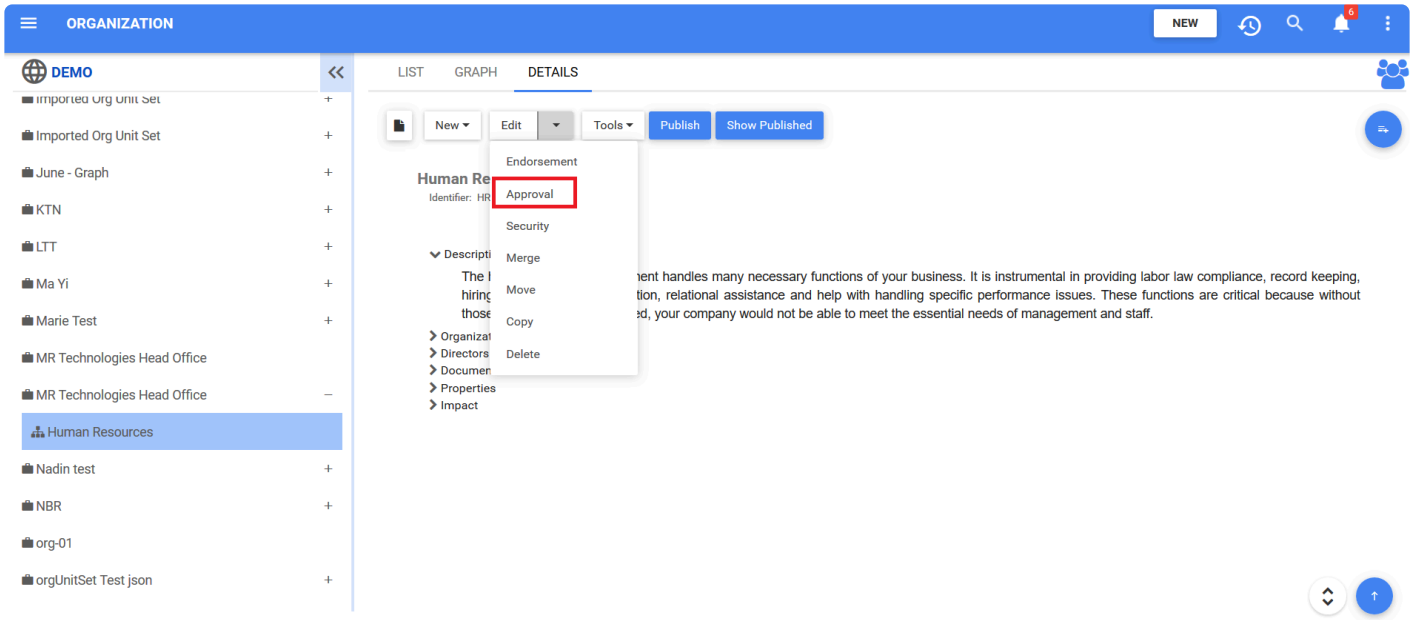
1. Navigate to the details section of the object. In this example, an Organization Unit



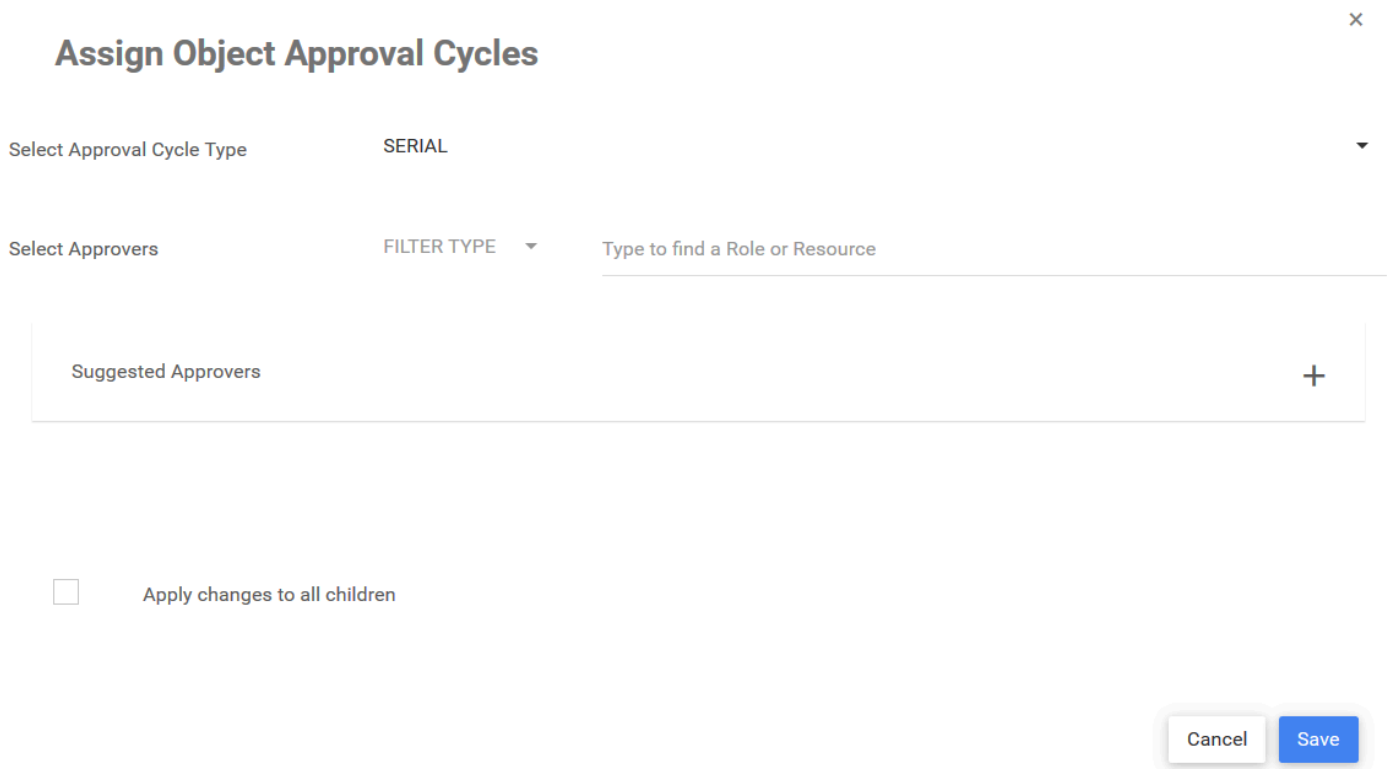
2. Navigate to the box



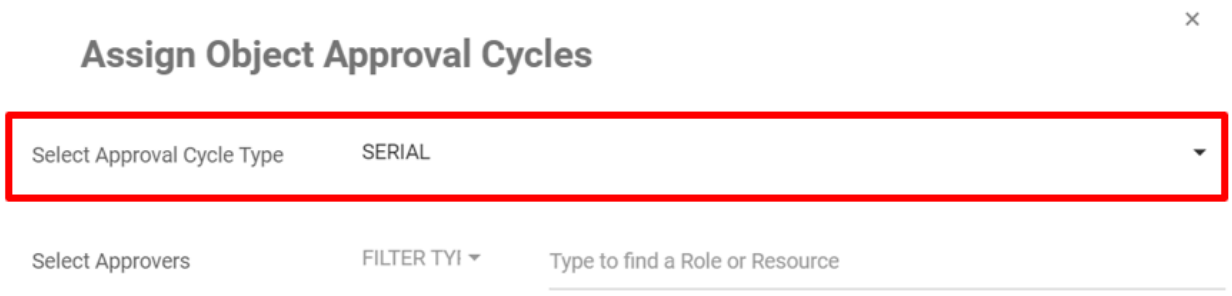
3. A drop-down menu will be generated. Choose the “Approval” box



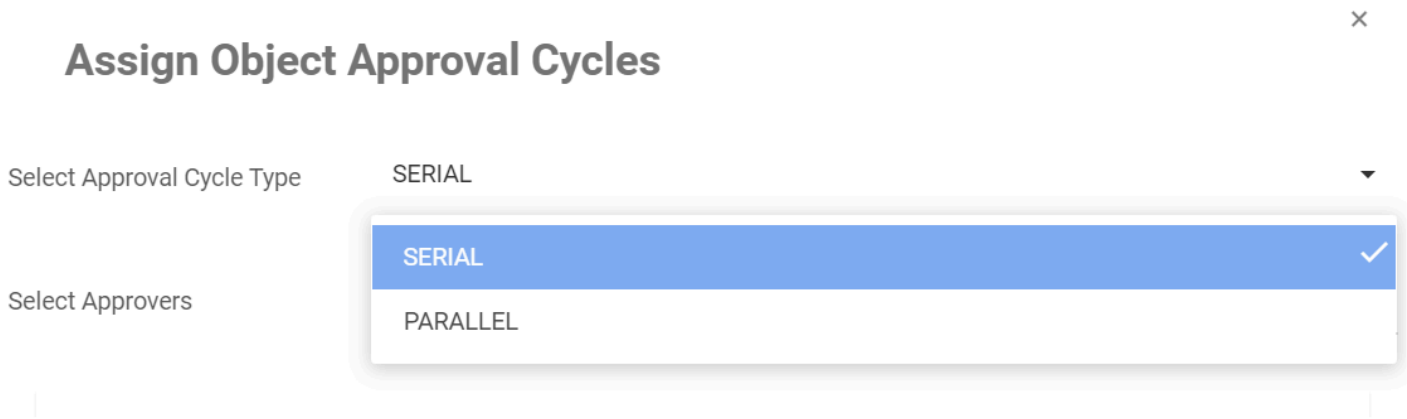
4. You will be redirected to the Assign Object Approval Cycles window



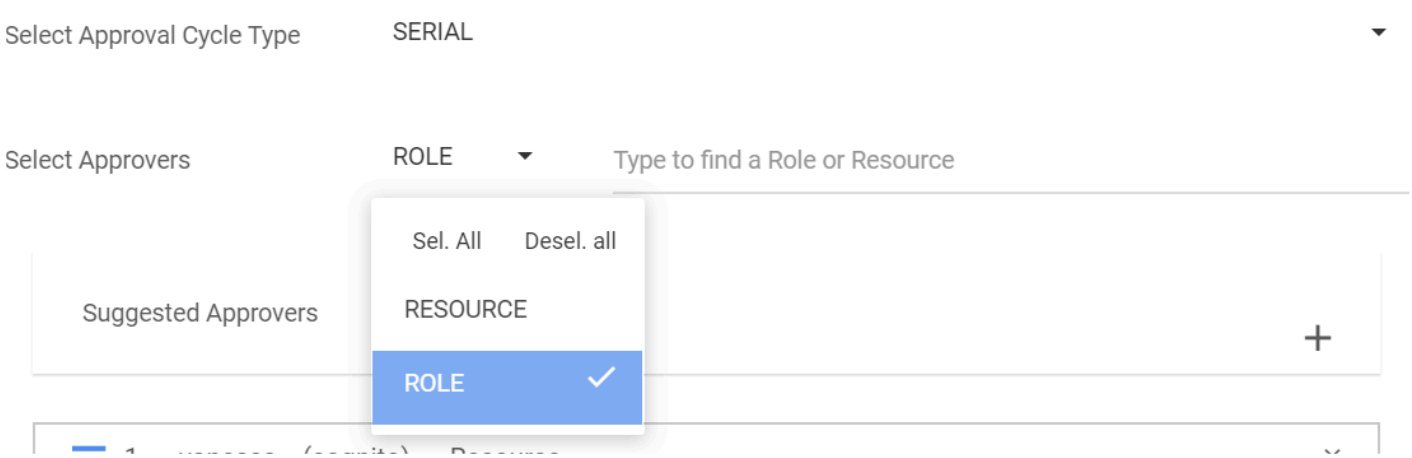
5. Navigate to the “Select Approval Cycle Type” box



6. Select the Approval Cycle type

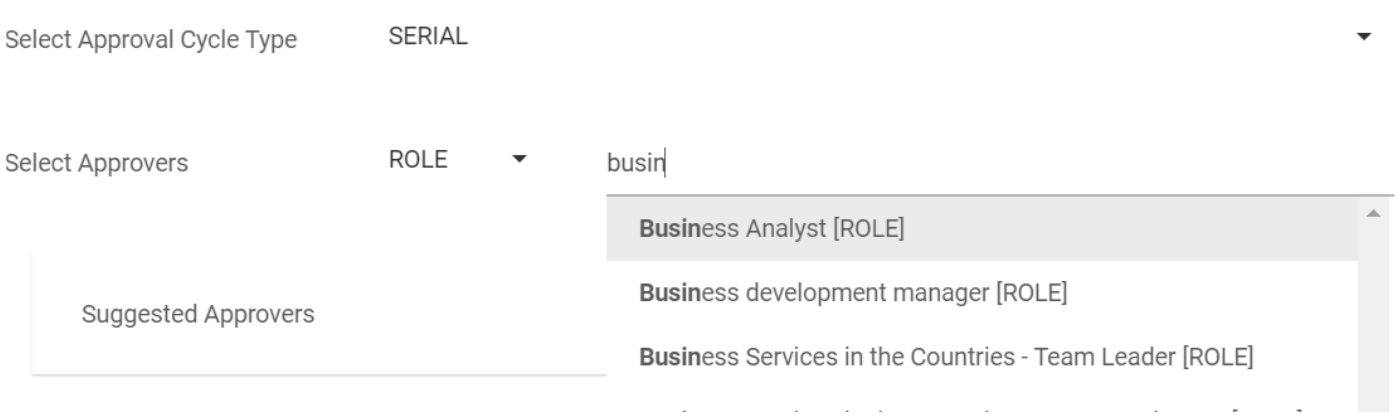


7. Navigate to “Select Approvers” and select a filter

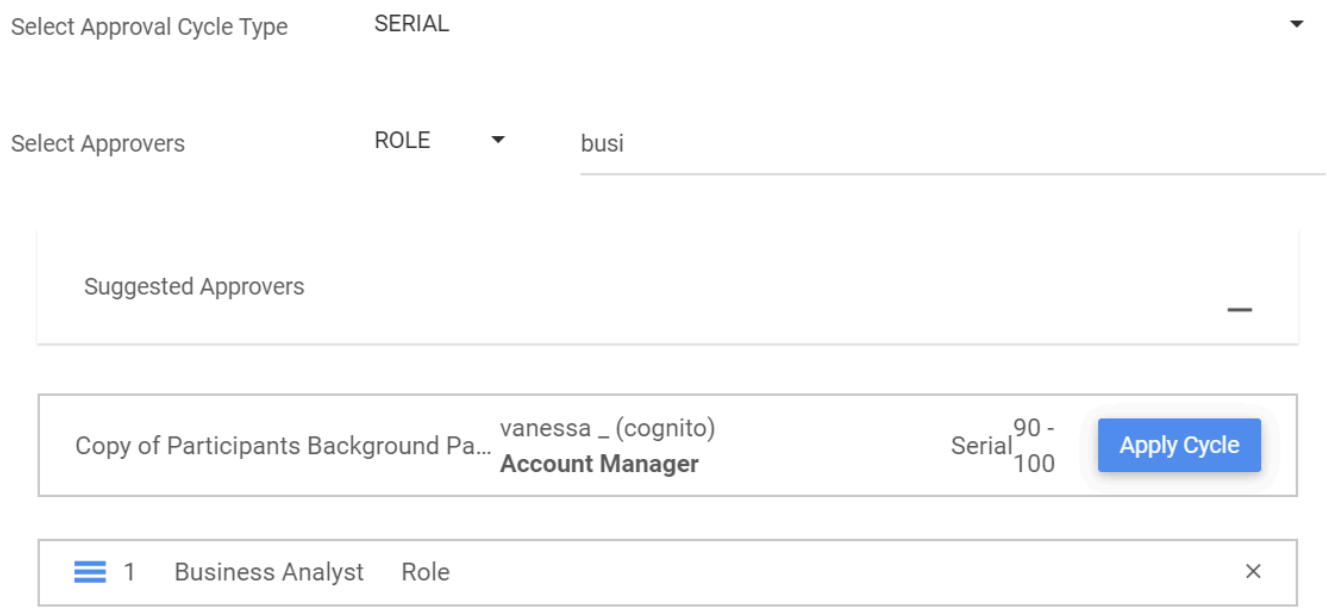


8. Type the name of the Role you want to assign as the approver. From the search suggestions, click to select the Role you want to assign

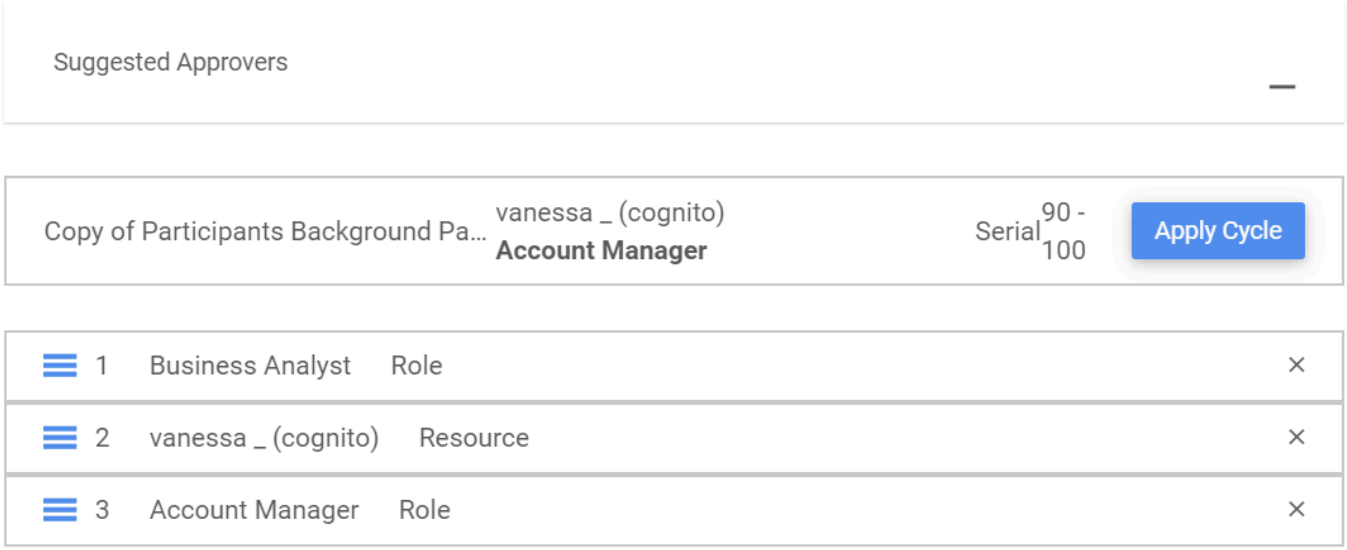
> The list of Roles will populate based on key word typing



9. Expand the Suggested Approval section to view suggested approvers from a similar object



10. Select “Apply Cycle” to the desired suggestion and the approvers will appear in a table



To remove approvers from an Approval Cycle, click on the “x”

11. Save the Approval Cycle

Once the object has been successfully been approved by approvers in the cycle, the Web Modeler will be able to publish the object.

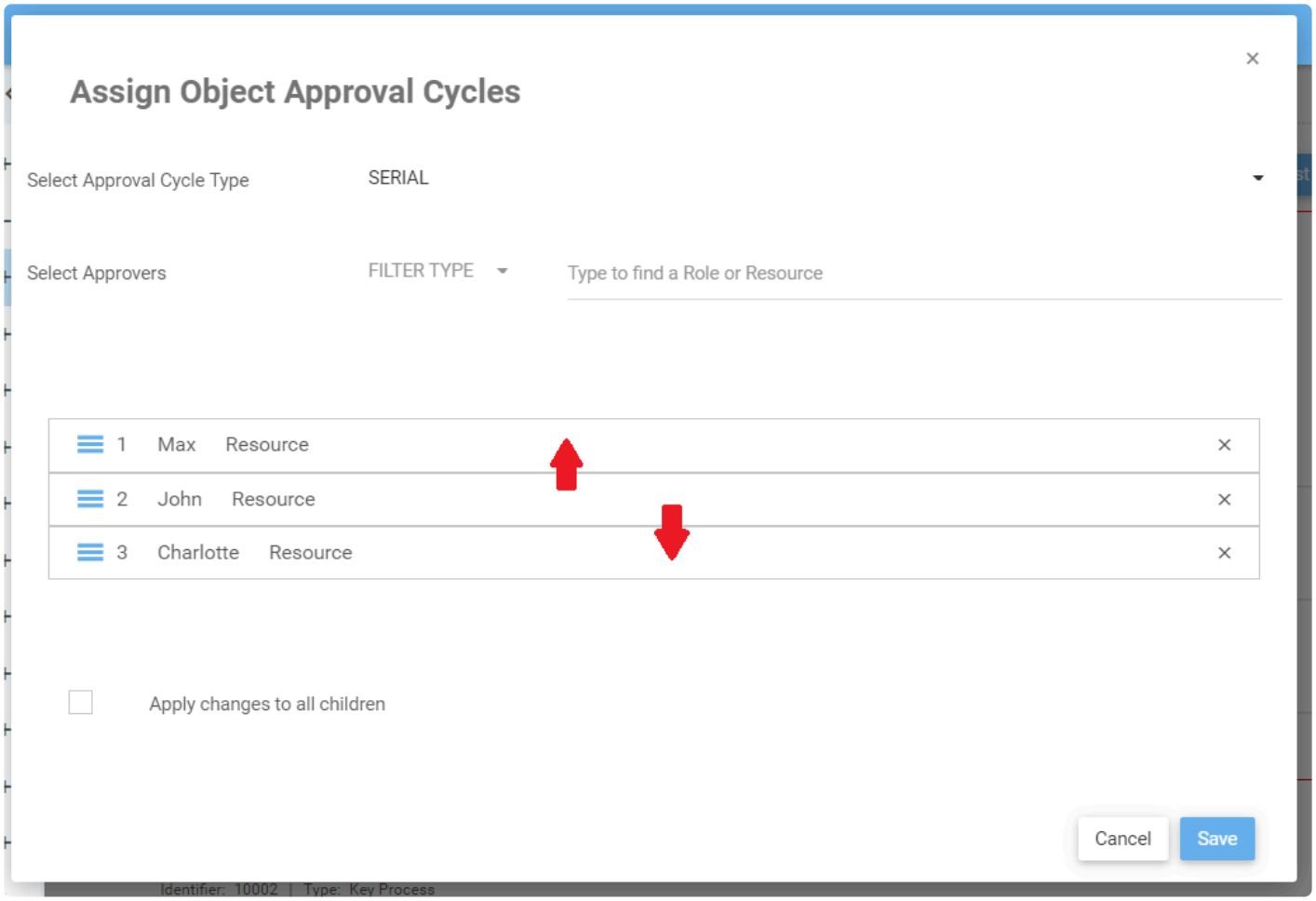
To learn more about Approval Cycles, click here

Modify Approval Configuration

Users can now modify the configuration of the approval cycle while an approval cycle is in progress. The changes done will apply to the ongoing approval cycle. Users can

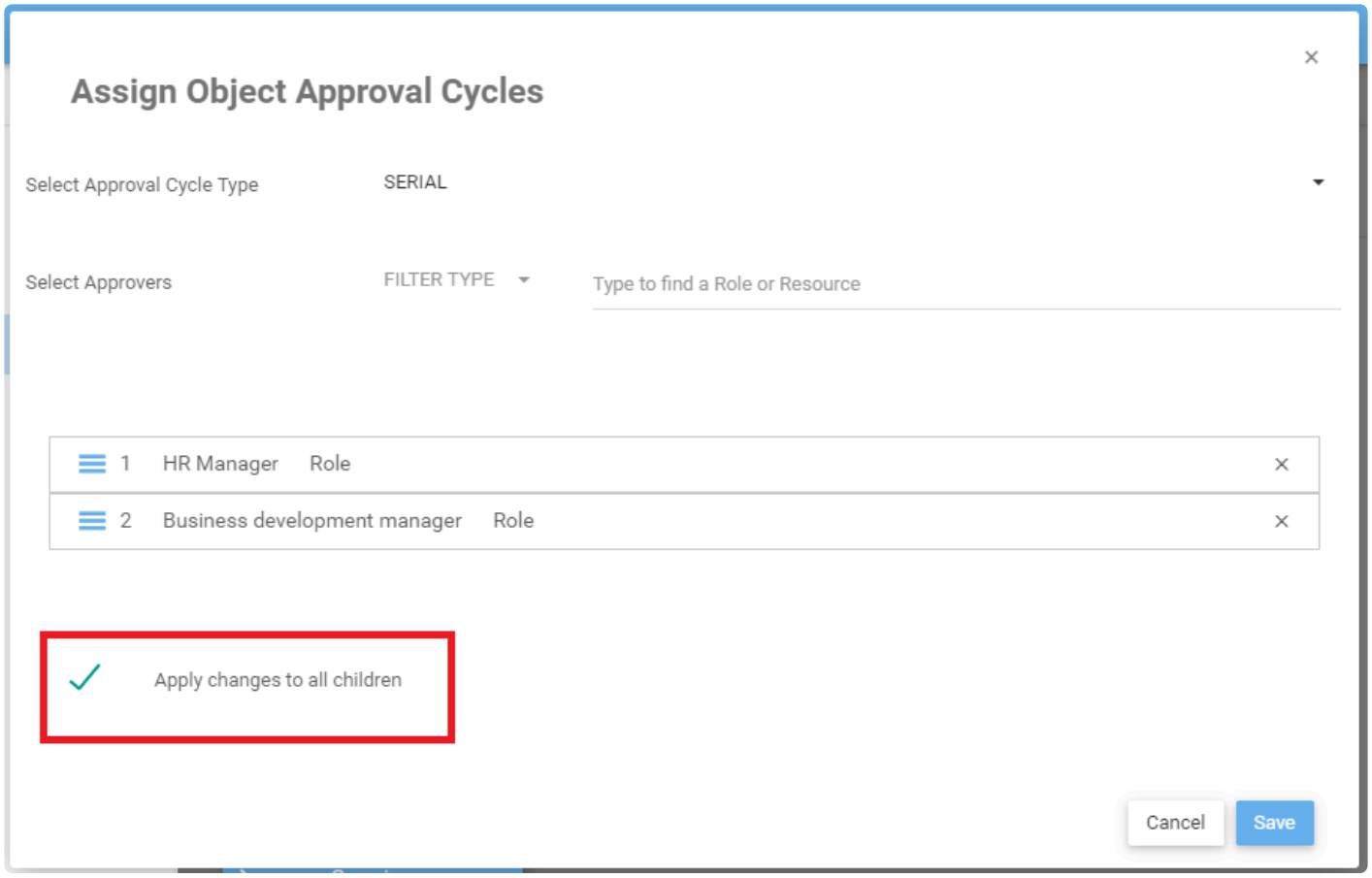
- Delete an Approver
- Add a new Approver
- Switch the Cycle Type
- Switch the Order of Approvers

To modify the order, simply drag and drop an approver to the desired position within a cycle.



Apply to all children

You can assign the same approval configuration to a process and all of its children. It can also be a quick way to remove all approvers assigned to a process and its children (by removing approvers and saving). To do so, a user must repeat the previous steps, but before saving, he has to check the box so the Save can apply to all children.


Assign Object Approval Cycles
Select Approval Cycle Type
SERIAL
Select Approvers
FILTER TYPE
Type to find a Role or Resource
1 HR Manager Role
2 Business development manager Role
Apply changes to all children
Cancel
Save

12.1.3.6 Security

Web Modelers can access the Security button, assign and customize the security settings for EPC objects if:

- They are System Admins
- They are Environment Admins
- They are an user with the Full Control Allow permission
- They are an user with the Read + Write + Delete Permission

Web Modelers need to ensure they have the permission to be a Web Modeler, the security designations above, their displayed content is set to Show Latest, and their editing tool is the Web.

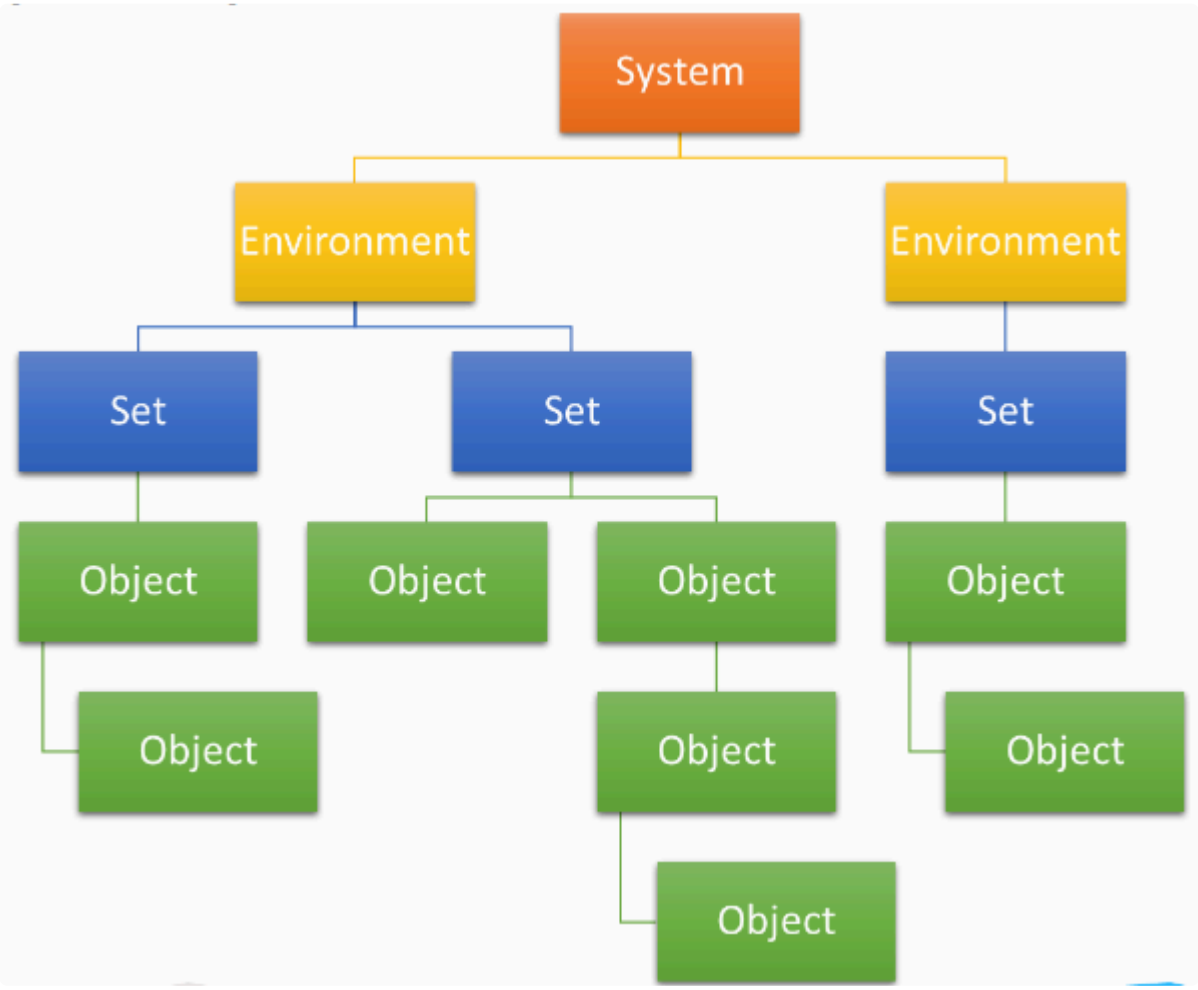
> If you are a Web Modeler without any of the security designations above, you should be able to see the Security button in the details tab drop down, but will receive an error message if you try to apply security.

The different levels of security that can be assigned to EPC objects are the following:

Level of Security	Description
System Admin	User has all levels of permission on all objects
Full Control Allow	User has Write/Delete, Write, Read and Approval permissions on the object (and its children)
Write Delete Allow	User has Write, Read and *can be granted* Approval permissions on the object (and its children)
Write Allow	User has Read and *can be granted* Approval permissions on the object (and its children)
Read Allow	User simply has read permissions and *can be granted* Approval permissions on the object (and its children)
Show Latest Allow	User is allowed to view EPC objects in show latest
System Admin	Denials are overridden by System Admin Privilege, they have ultimate power on all environments and the objects within
Full Control Deny	User is fully denied to all EPC objects
Write Delete	User has denied Write/Delete, they can still Read and Write on the object (and its children), and

Deny	*could be granted* Approval permission
Write Deny	User has denied Write, they can still Read the object (and its children), and *could be granted* Approval permission.
Read Deny	User has been denied Read, they *cannot* see the object, nor be granted Approval Permission
Show Latest Deny	User has been denied to view EPC objects in show latest

Object Hierarchy in EPC



EPC objects always inherit security settings from their parent object. Any change to the security settings is propagated to that object's children. Objects inherit the cumulative permissions on the objects above them:

- For any given object, the security permissions inherited by their parent are **greyed-out/disabled**

The settings on child objects can be modified without affecting the settings of their parents. For lower level objects, non-inherited permissions can be granted to them. The non-inherited permissions are **check-able:**

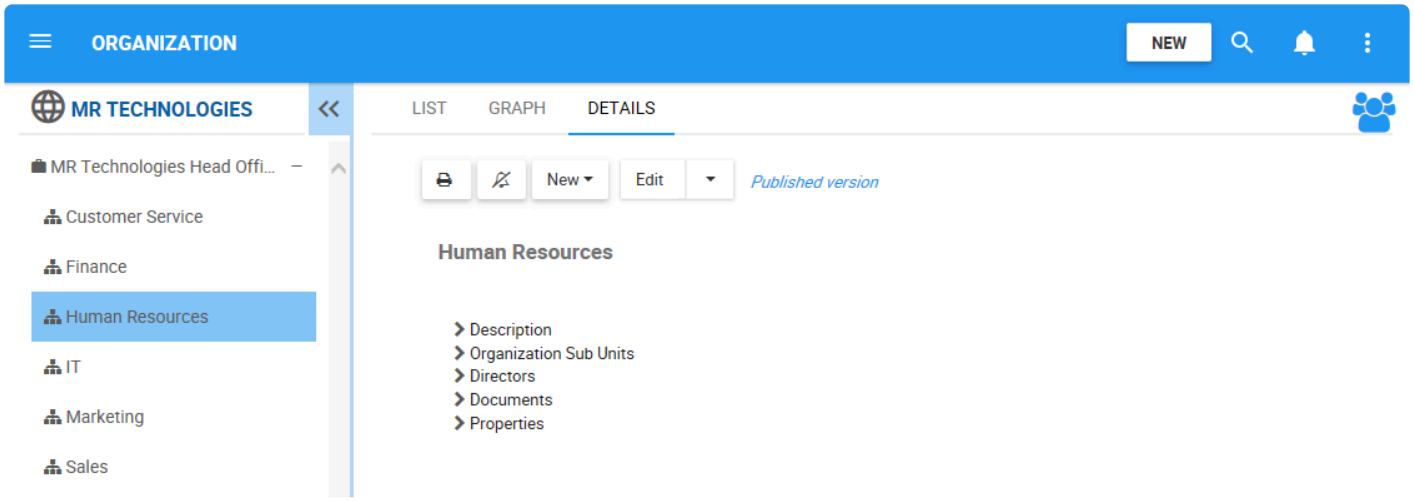
- If a parent object has Allow Read permissions, the child inherits this, and could be granted Allow Write permission.
- If a parent object has Allow Read + Allow Write, the child inherits this, and could be granted Allow Write/Delete permission.
- If a parent has Deny Write/Delete permission, the child inherits this, and could be granted Deny Write.
- If a parent has Deny Write/Delete + Deny Write, the child inherits this, and could be granted Deny Read.
- For all permissions: Permissions can be further Allowed on children in this order: Read, Write, Write/Delete
- For all permissions: Permissions can be further Denied on children in this order: Write/Delete, Write, Read

! If a parent has been denied a permission, this denial is inherited by all children, and cannot be overruled. The level of denial can be increased until Read has been denied

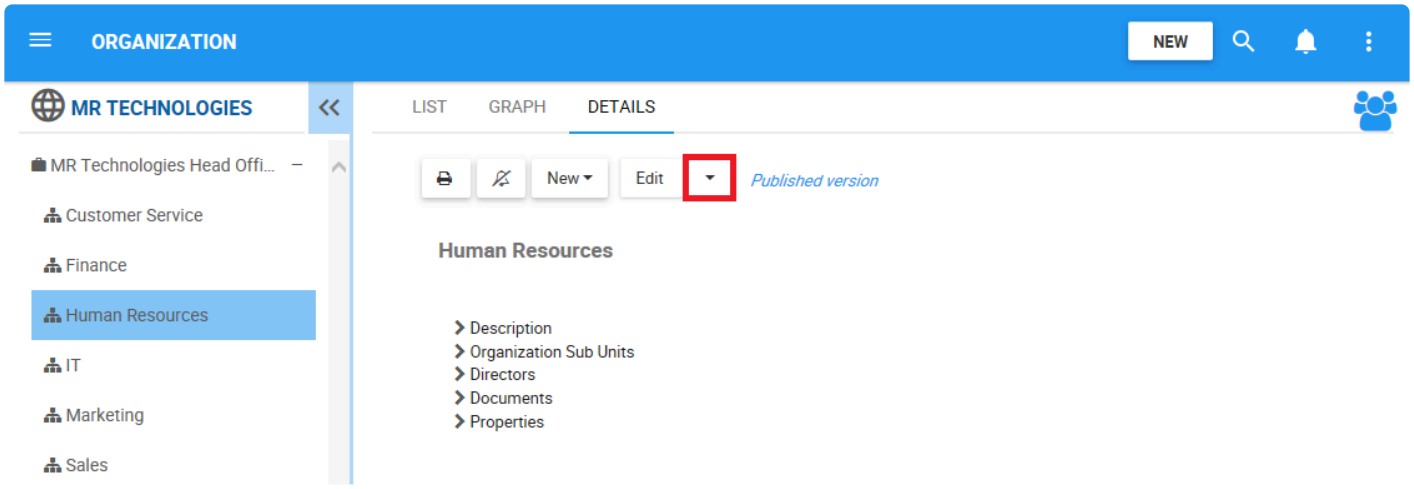
Follow the instructions to set Security Permissions for an EPC Object

The button will appear within the toolbar of the details and graph tabs on each object except “Flow Objects”

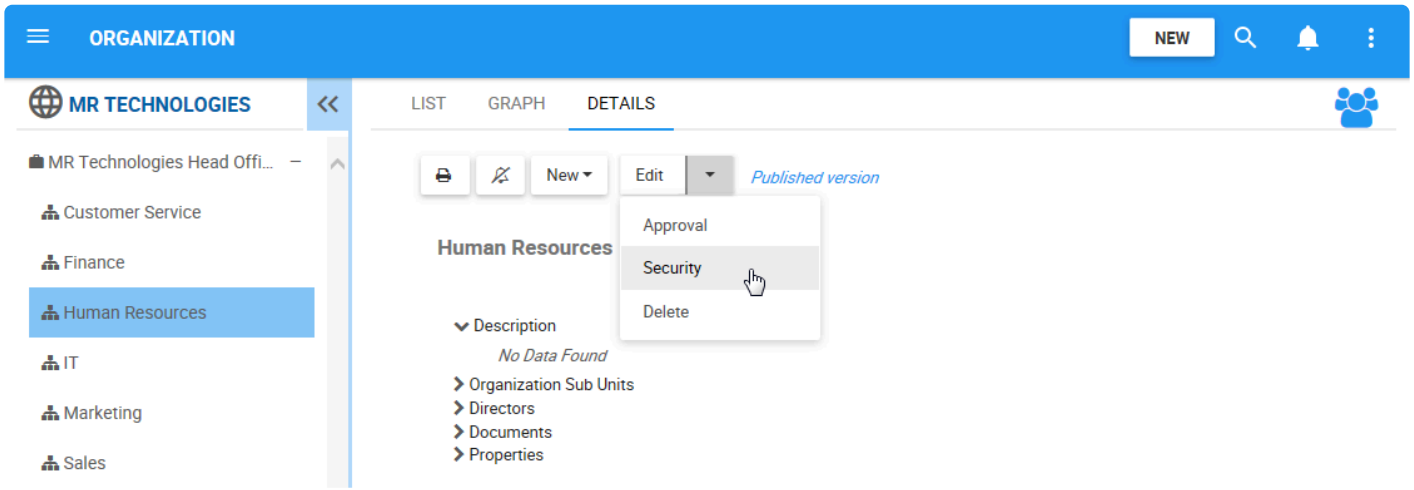
1. Navigate to the details section of the object. In this example, an Organization Unit



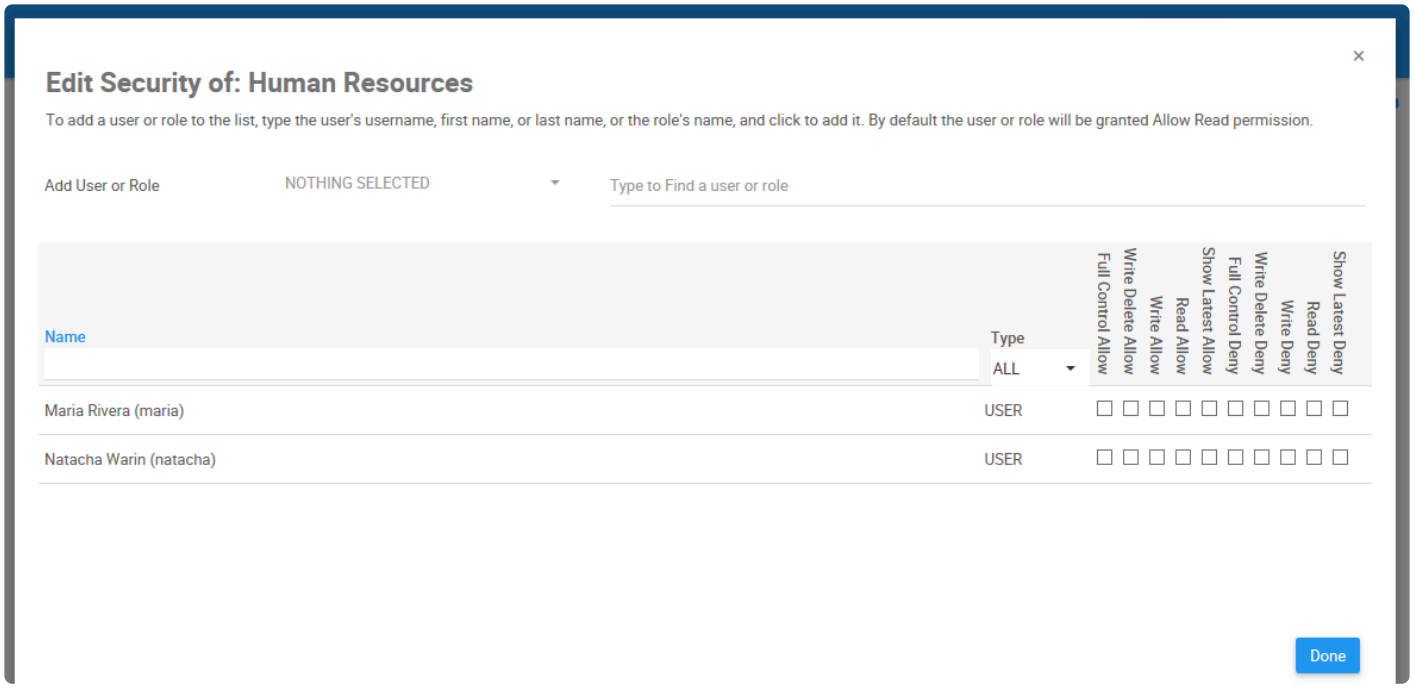
2. Navigate to the box



3. A drop-down menu will be generated. Choose the “Security” box

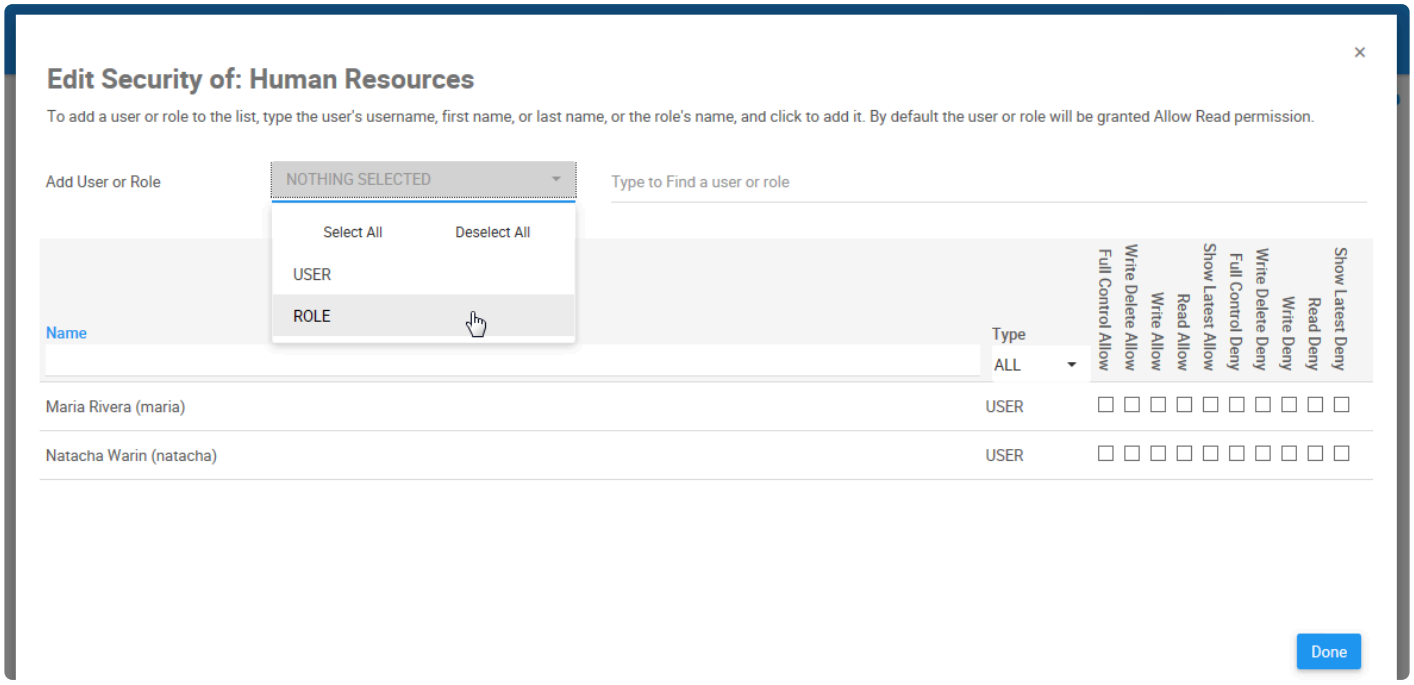


4. You will be redirected to the “Edit Security of: [Object] window



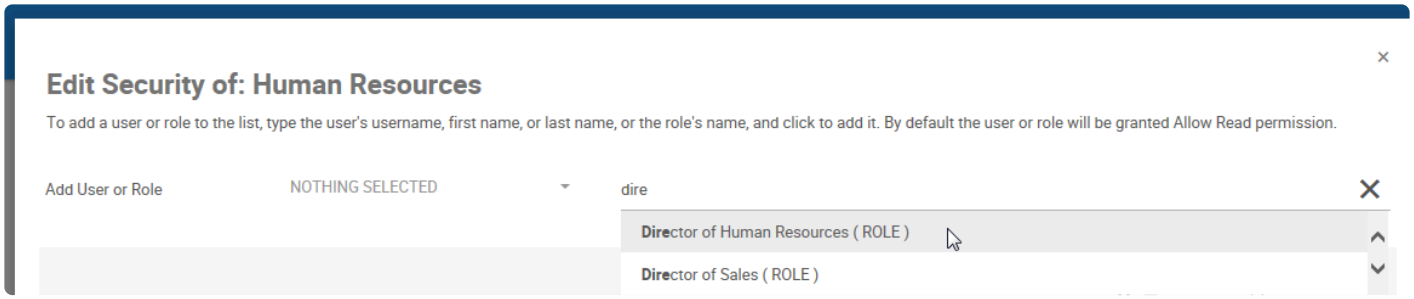
A list will be displayed in this window with the User, Roles and Groups with environment access or Allow/Deny permissions and explicit or inherited permissions on the objects. Some users and roles don't appear in the list by default if they are not given explicit permissions to the environment or a predecessor object in the hierarchy.

5. To add a user or role to the list, Navigate to "Add User or Role" and select a filter

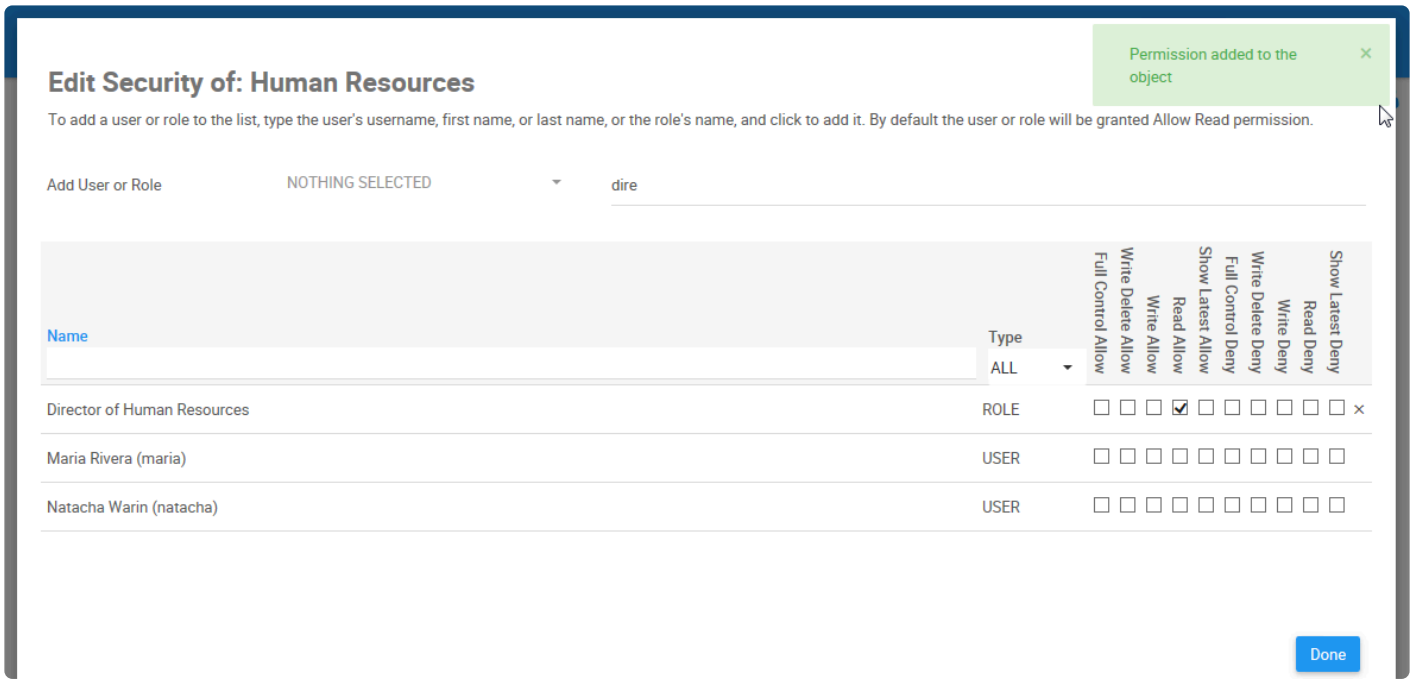


6. Type the name of the Role you want to set a security permission for the EPC object. From the search suggestions, click to select the Role you want to assign

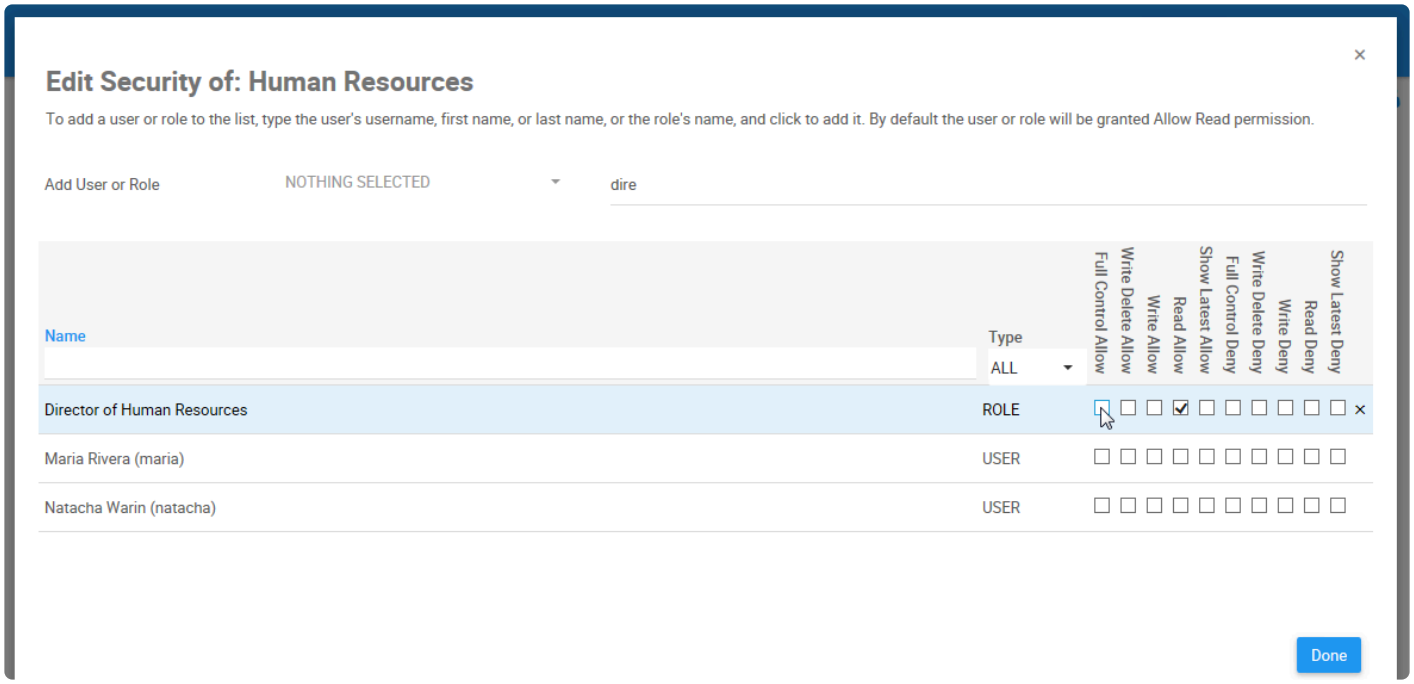
The list of Roles will populate based on key word typing



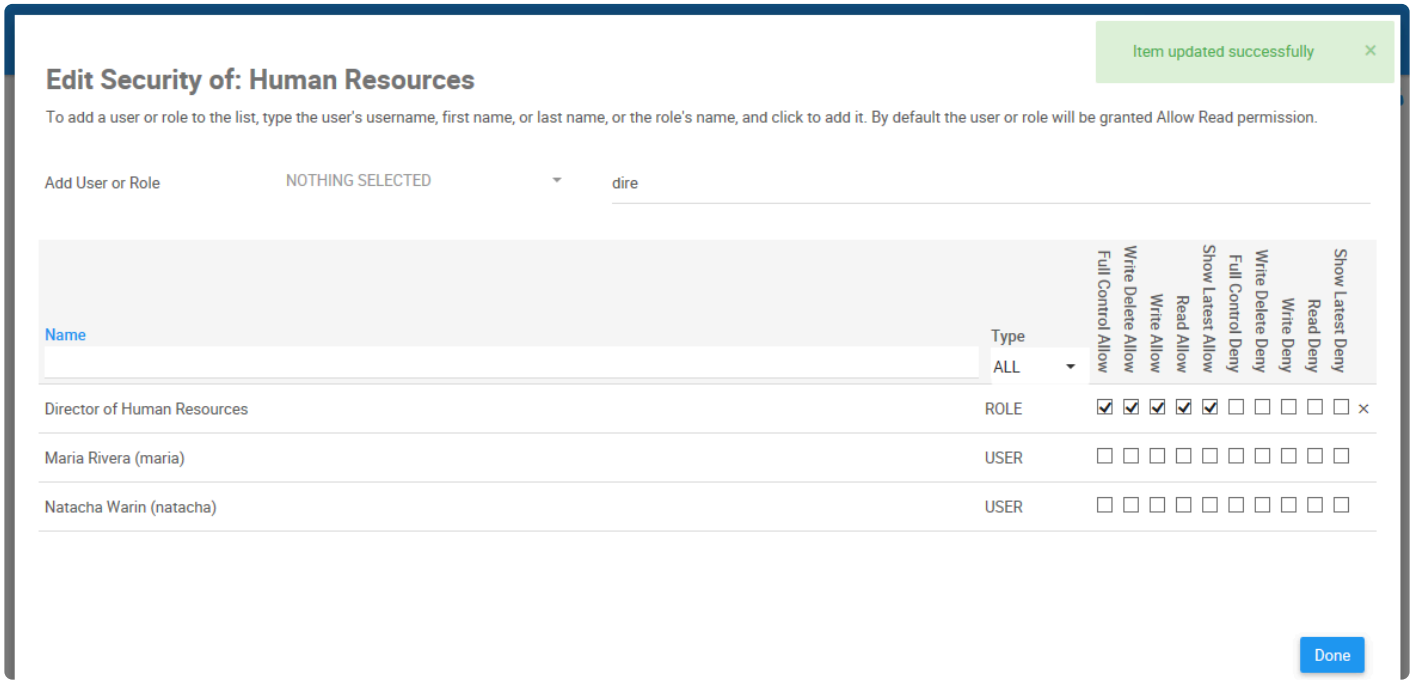
7. The Role will appear on the table under, where the security level can be assigned. By default, the user or role will be granted Allow Read permission. You will receive a notification informing you the permission was added to the object.



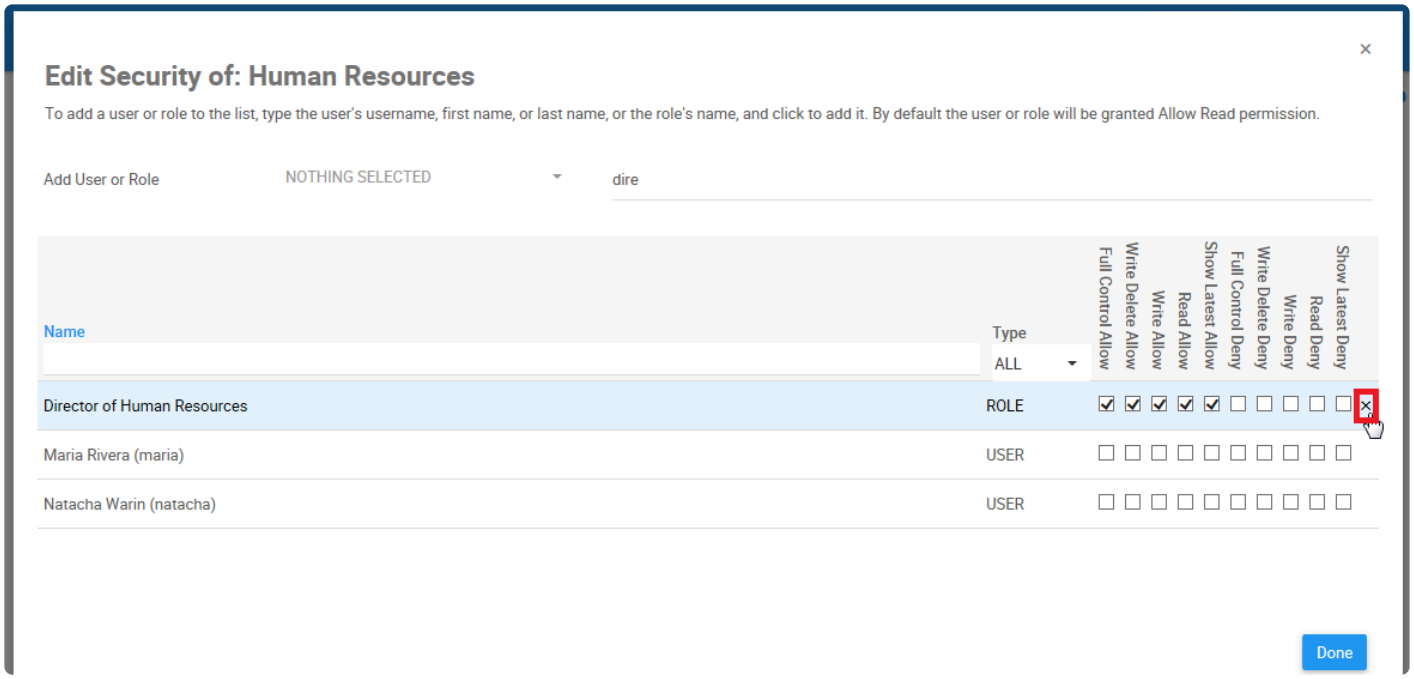
8. Navigate to the “Full Control Allow” security level box for the Role



9. Check to the “Full Control Allow” security level box for the Role



10. To remove the permission from the object, click on the “x”



Lock

For all Modules, updating the security on an object that is being edited is not prevented. The user won't receive a lock error message.

12.1.3.7 Merge

In certain circumstances, EPC modelers may want to merge 2 objects of the same type into one. This often occurs upon identification of duplicate objects (especially after imports), during restructuring initiatives, or sometimes due to deprecation of an object where another object acquires it's impacts.

To be able to use **Merge**, a user needs to be:

- A Modeler that has Write permissions (or better: Write Delete, Full Control) on the Target Object
- A Modeler that has Write Delete permissions (or better: Full Control) on the Source Object

> Note that the source object is the one you are on when initiating the Merge action. Since the Merge button is under edit, the required permissions can be considered fulfilled for the Source object by default. The system will validate the Target object upon selection.

The objects that have the "Merge" option are the following:

Module	Object
Performance	-Objective -KPI -KRI -KCI
Organization	-Org Unit -Role -Asset -Resource
Documents	-Document
Risk	-Risk
Control	-Control
Rule	-Rule
Master Data	-Entity -Attribute

What will be merged?

The objective of Merge is to deprecate one object (Source) and transfer all its Impacts and Associations to another object (Target). Therefore, ONLY Impacts and Associations of the source object will be transferred to the target object.

	Org Units (RASCI-VS)	Role (Not RASCI-VS)	Role (RASCI-VS)	Asset (RASCI-VS)	Resource (RASCI-VS)	Documents	Risks	Controls	Rules	Role (CRUD	Resource (CRUD)	Attribute
Objective	■	■	■	■	■							
KPI	■	■	■	■	■	■	■	■				
KRI	■	■	■	■	■	■	■	■				
KCI	■	■	■	■	■	■	■	■				
Org Unit						■						
Role						■						
Asset	■	■	■	■	■	■			■			
Resource		■				■						
Document	■		■	■	■	■						
Risk	■		■	■	■	■	■					
Control	■		■	■	■	■						
Rule	■		■	■	■	■			■			
Entity	■		■	■	■	■			■	■	■	■
Attribute	■		■	■	■	■			■	■	■	

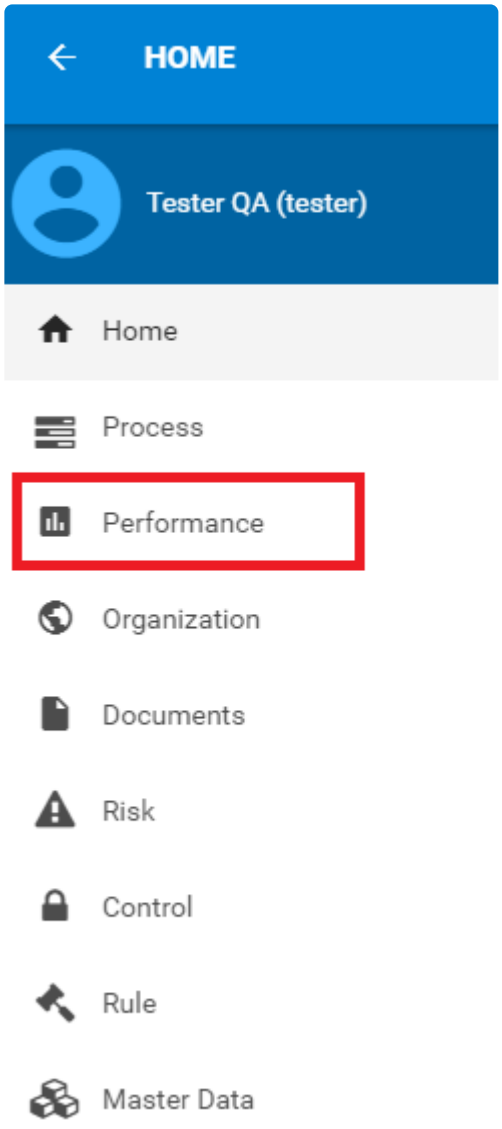
! The Source Object is deleted upon completion of the merge action.

Associations that will be merged to the target role:

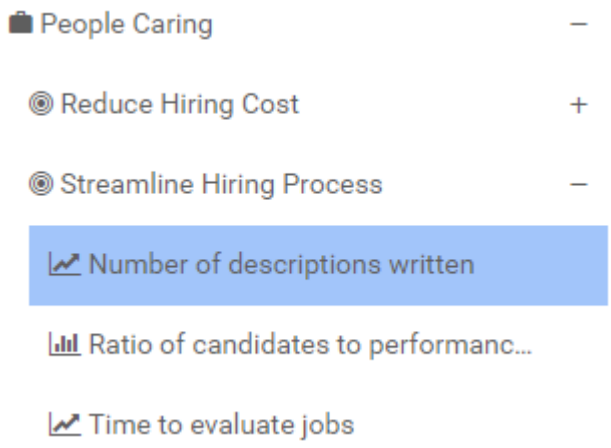
How to use Merge

For the purpose of this example, we will use the Performance Module, and will merge a KPI, but the same steps can be followed for all objects in all modules.

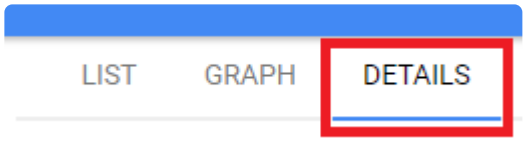
1. Select the Peformance Module



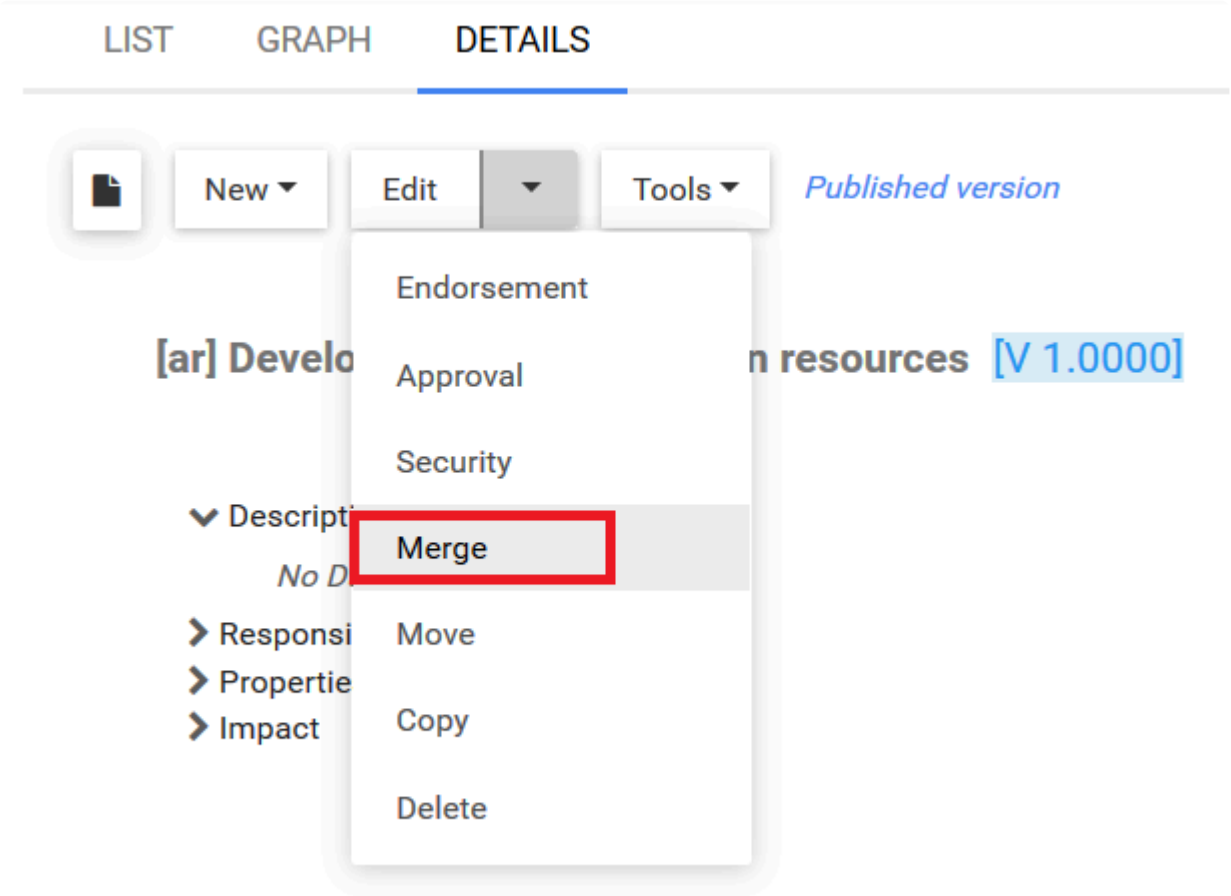
2. Next, select the object you would like to view in your Navigation Menu



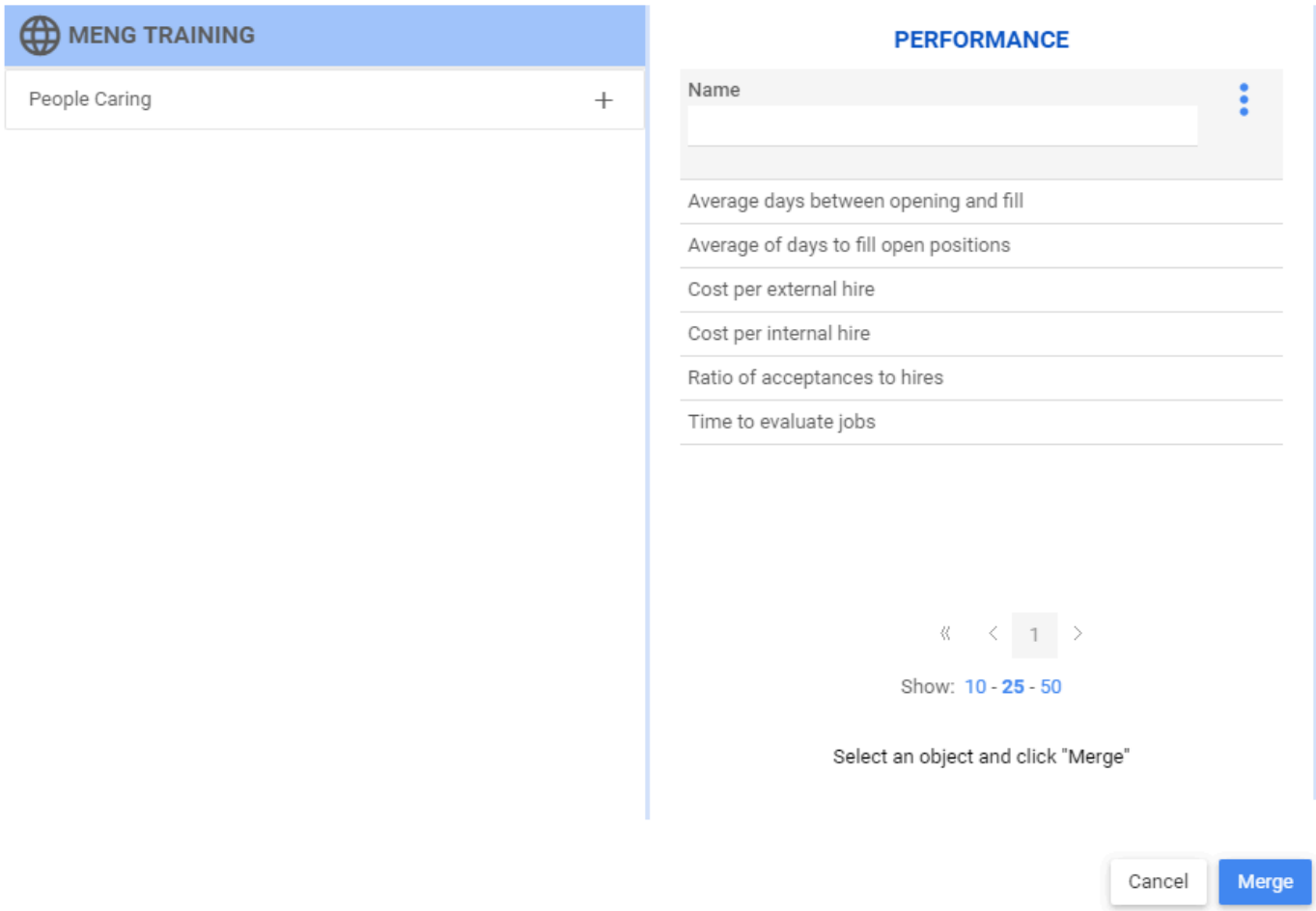
3. Select the ‘Details’ page of the object



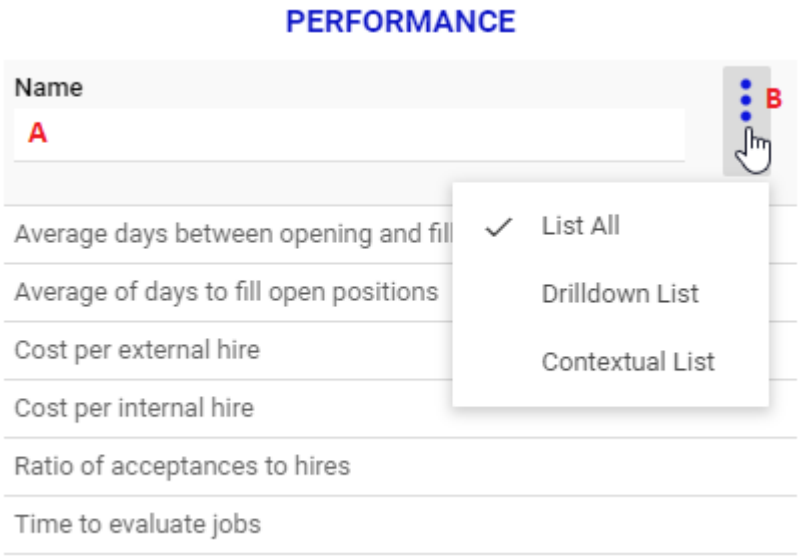
4. Click on the Edit Dropdown which will generate a list of actions you can perform. From this list, click on **Merge**



5. A panel will open up allowing you to search for the item you would like to merge your object too. Note that you can only merge objects with identical types (i.e. Assets with other Assets, Roles with Roles, KPIs with KPIs, etc.)



6. If you wish to search for your object, click on the elipsis in the right-hand corner and select the list you desire. From here, you can use the search bar to search for the item.



7. Select the item you would like to merge your object too

8. Click on **Merge** and the objects will be combined

Lock

Merging an object that is being edited by another user is prevented. The user will receive a lock error message. An example of a message is given is the Edit Lock page.

Merging to a target object that is being edited by another user is also prevented. The user will receive the same lock error message.

12.1.3.8 Move

Users have the ability to move objects within modules, allowing for editing, updating of existing content.

Users can move:

1. Processes – Processes can be moved
2. Roles
3. Resources
4. Org Units
5. Assets
6. Documents
7. Risks
8. Controls
9. Rules
10. KPIs, KRIs, KCIs
11. Entities, Attributes
12. All Folder Types

*Note that objects can only be moved into a logical parent. *

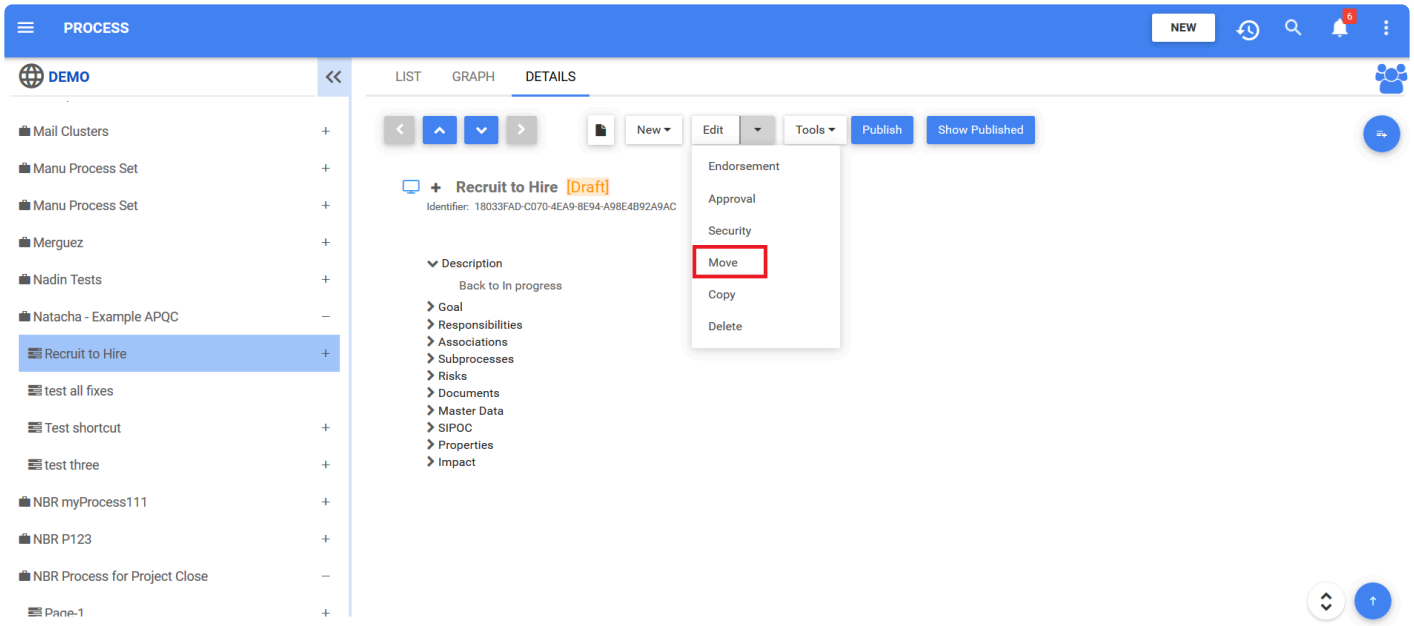
- Documents, Risks, Controls, Rules, Entities & Attributes can only be moved from Folder to Folder
- Roles, Resource, Assets can only be moved from Org Unit to Org Unit
- Org Units can be moved from Org Unit to Org Unit, from Org Unit to Org Set, or from Org Set to Org Set
- KPIs, KRIs, KCIs can be moved from Indicator to Objective, Indicator to Indicator or from Objective to Objective
- Processes can be moved from Sub-Process to Sub-Process, from Sub-Process to Process Set, or from Process Set to Process Set
- Folders can be moved from Folder to Folder, Folder to Set or Set to Folder

To move an object:

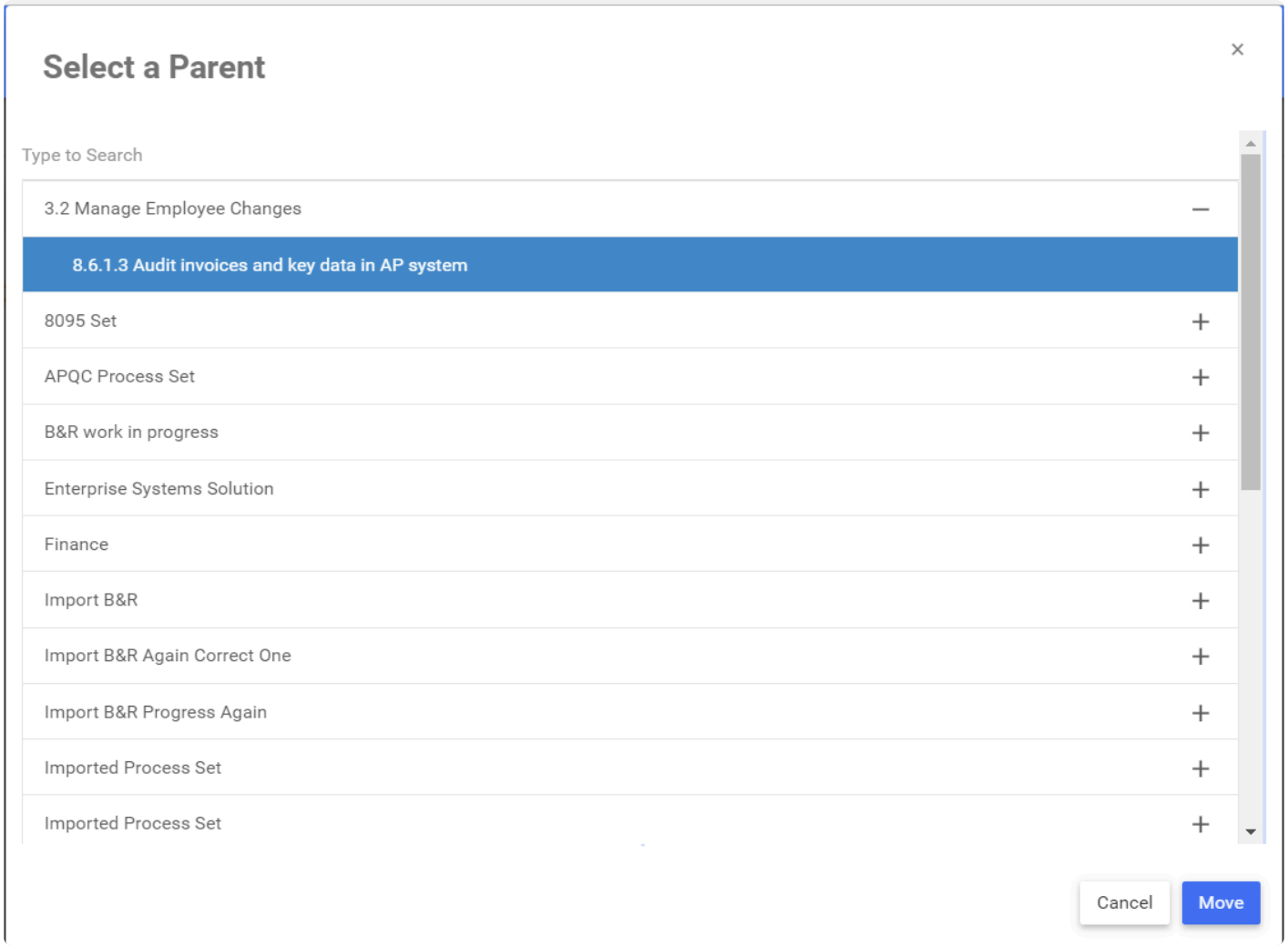
Please make sure you are in “Edit” mode

1) Navigate to selected object’s Graph (for processes) or Details pages (for all other objects + processes)

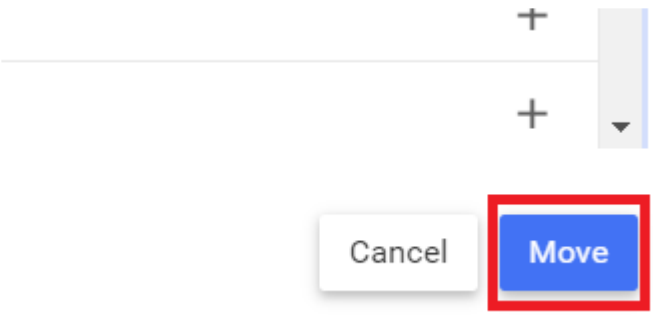
2) In the Edit dropdown, select “Move”



3) Select the logical parent where you wish to move the object



4) Select “Move”



Please Note this will not publish the object in question with its new location.

Lock

Moving any object that is being edited by another user is prevented. The user will receive a lock error message. An example of a message is given is the Edit Lock page.

Moving a process to a new parent that is being edited by another user is prevented. The user will receive the same lock error message.

Moving all objects (except processes) to a new parent that is being edited by another user is not prevented. The user will not receive the lock error message.

12.1.3.9 Delete

The Delete button enables Web Modelers to delete objects on the EPC Web App. Web Modelers need to have the Delete security permission to delete objects.

Once an object is deleted, all its children objects will be deleted as well. It is possible that the user does not have delete permissions on one or more child objects. In this case, the deletion is aborted, and a prompt will be generated.

When an object is going through an approval cycle, the Delete button will be disabled.

The Delete button is available for all modules in the Details tab of:

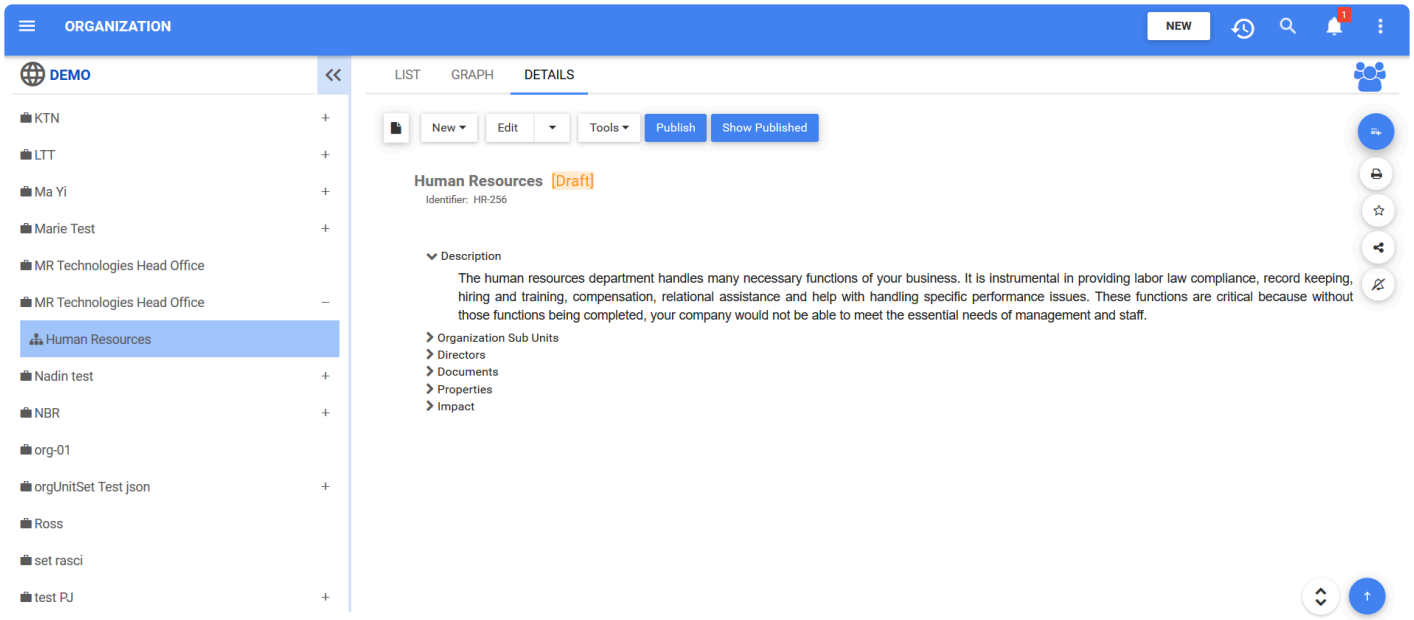
- Sets
- Folders
- Processes
- Objectives
- Units
- Objects

> The Delete button is not available on Flow Objects details tab

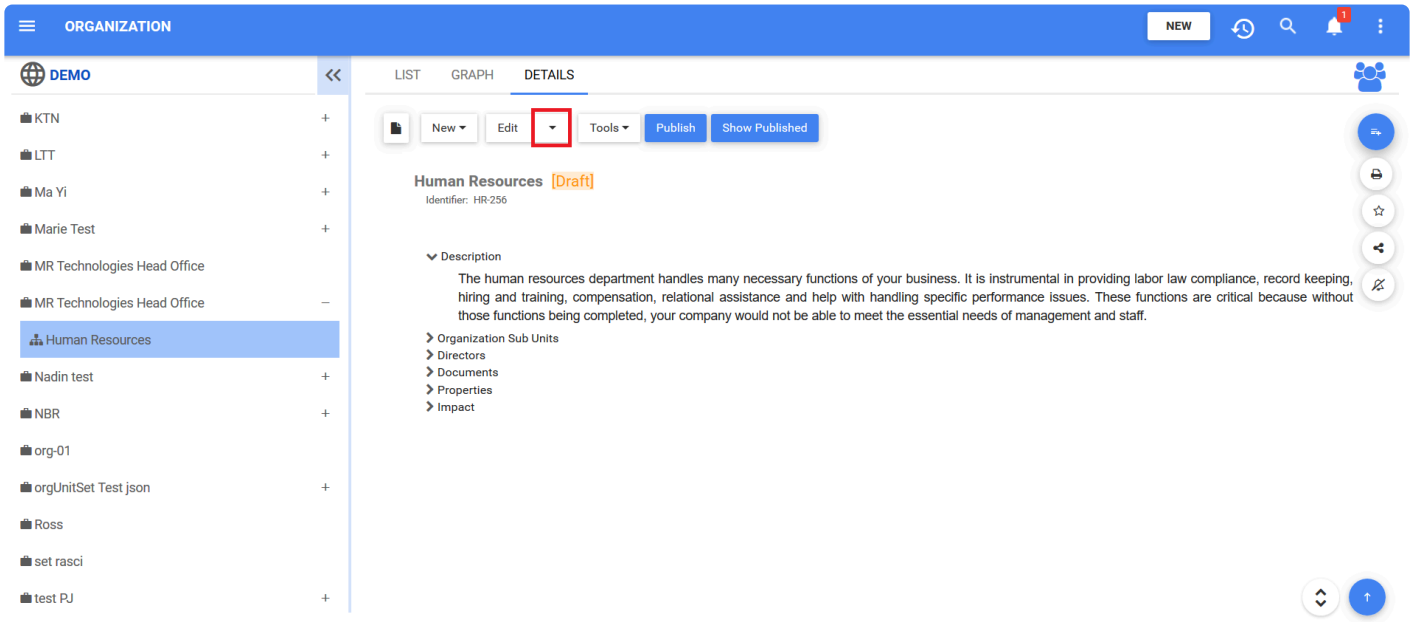
Follow the instructions to delete an object

Web Modelers need to ensure they have the permission to be a Web Modeler, permission to Delete, their displayed content is set to Show Latest, and their editing tool is the Web.

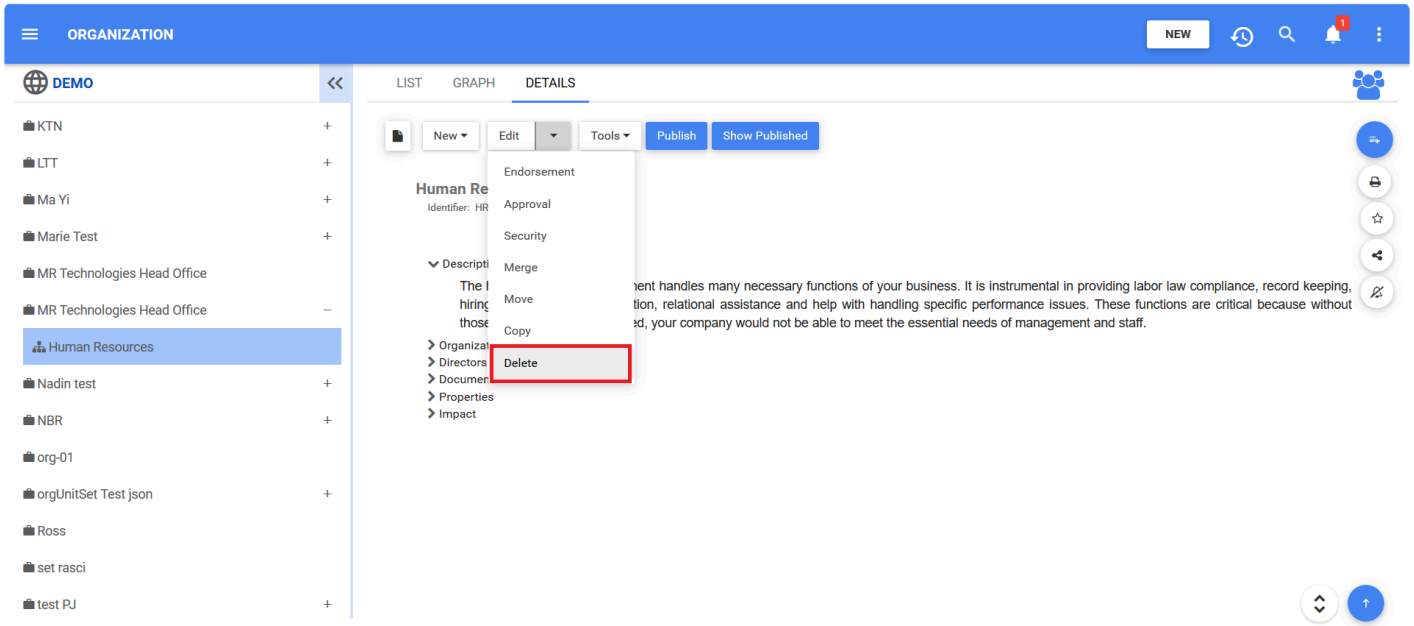
1. Navigate to the details section. In this example, an Organization Unit



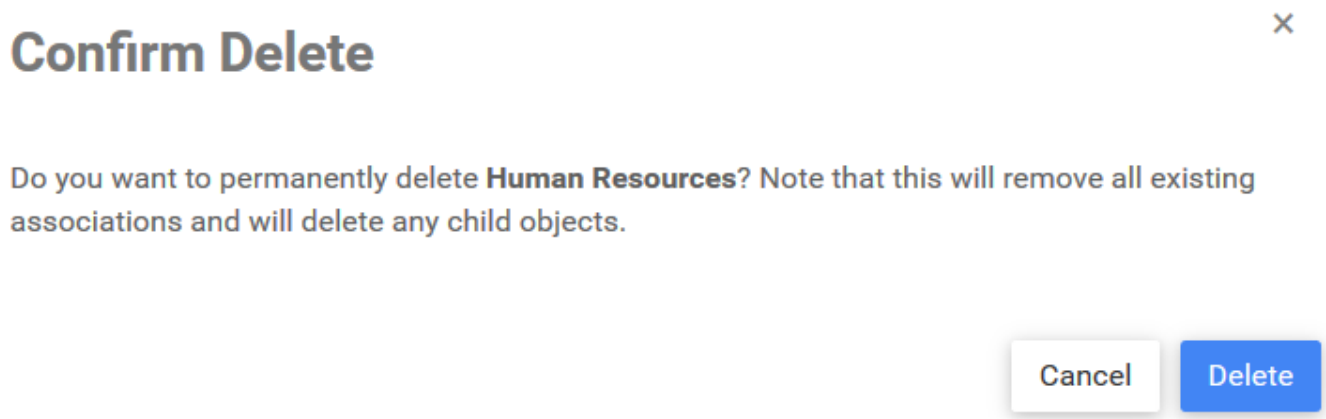
2. Navigate to the box



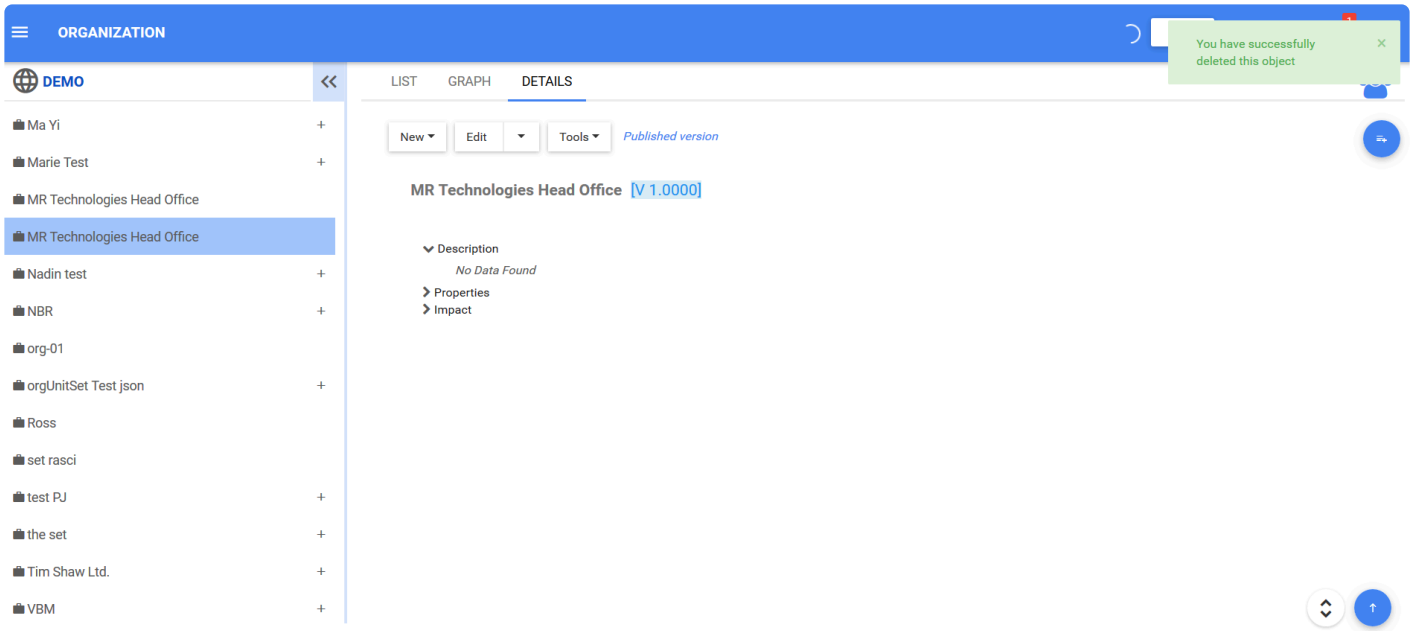
3. A drop-down menu will be generated. Choose the “Delete” box



4. A prompt will be generated. If you want to permanently delete the object and all its child objects, click on the Delete box. In this example, the Organization Unit “Marketing” and all its roles, assets and resources will be deleted.



5. You will be redirected to the details tab of the parent of the object and you will receive a notification saying the object was successfully deleted. In this example, the parent is the Organization Unit Set.



Lock

Deleting any object that is being edited by another user is prevented. The user will receive a lock error message. An example of a message is given is the Edit Lock page.

12.1.3.10 Publish

The Publish button enables Web Modelers to publish objects on the EPC Web App. Web Modelers can publish all objects in the EPC. Publishing allows all EPC users within the environment to view the object.

Web Modelers need to ensure they have the permission to be a Web Modeler, their displayed content is set to Show Latest, and their editing tool is the Web. Web Modelers with restricted security access on objects should not be able to see the object, or publish any objects they have been restricted access from, the Web Modeler must at least have Write Permission

Publishing a parent object does not publish its child objects. For example, publishing a process does not publish the process sub-processes. Publishing an object does not publish the object's associations. The Web Modeler can choose when to publish child objects, as well as associations.

Web Modelers can see and use the Publish button when the object has never been published before, the object has a new version, and the object has passed through an approval cycle successfully.

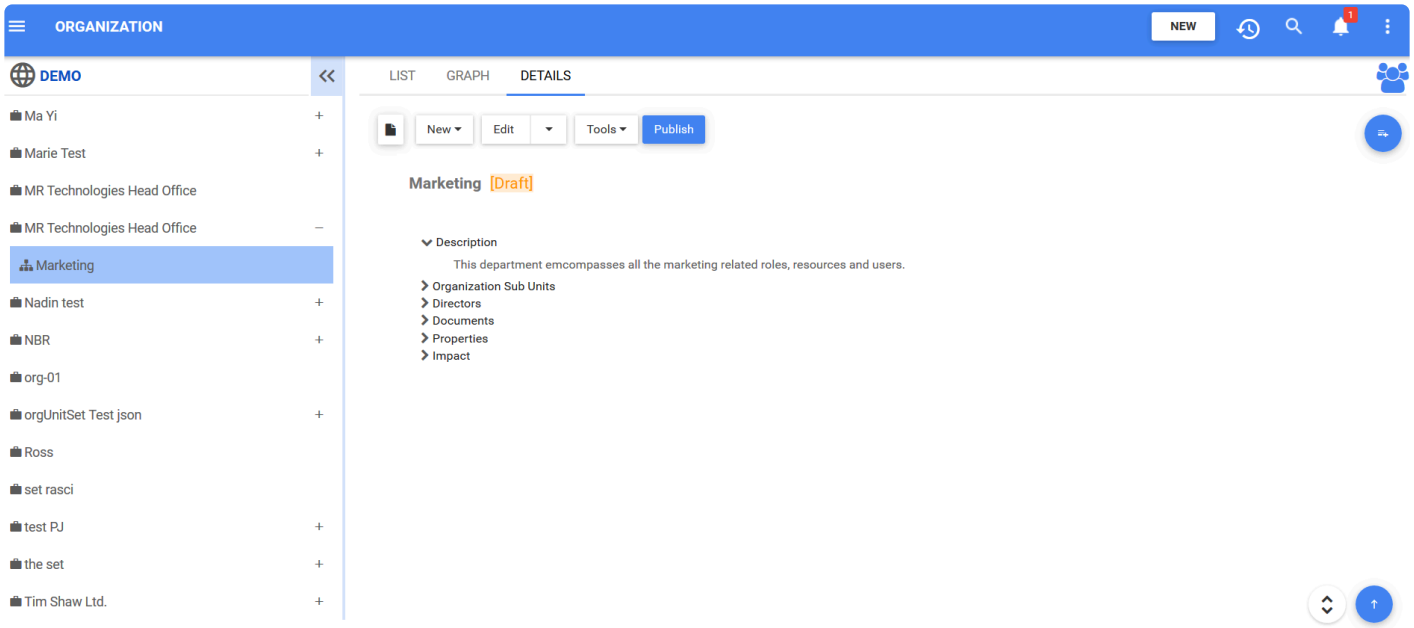
Web Modelers cannot see and use the Publish button when the object is already published, when the Web Modeler is viewing the published version of the object, when the object has approvers assigned, and the object must go through an approval cycle, when the object is locked, and when the parent version is not published.

When the parent of an object is not published, the Publish button is blocked and greyed out.

The Publish button is disabled on flow objects.

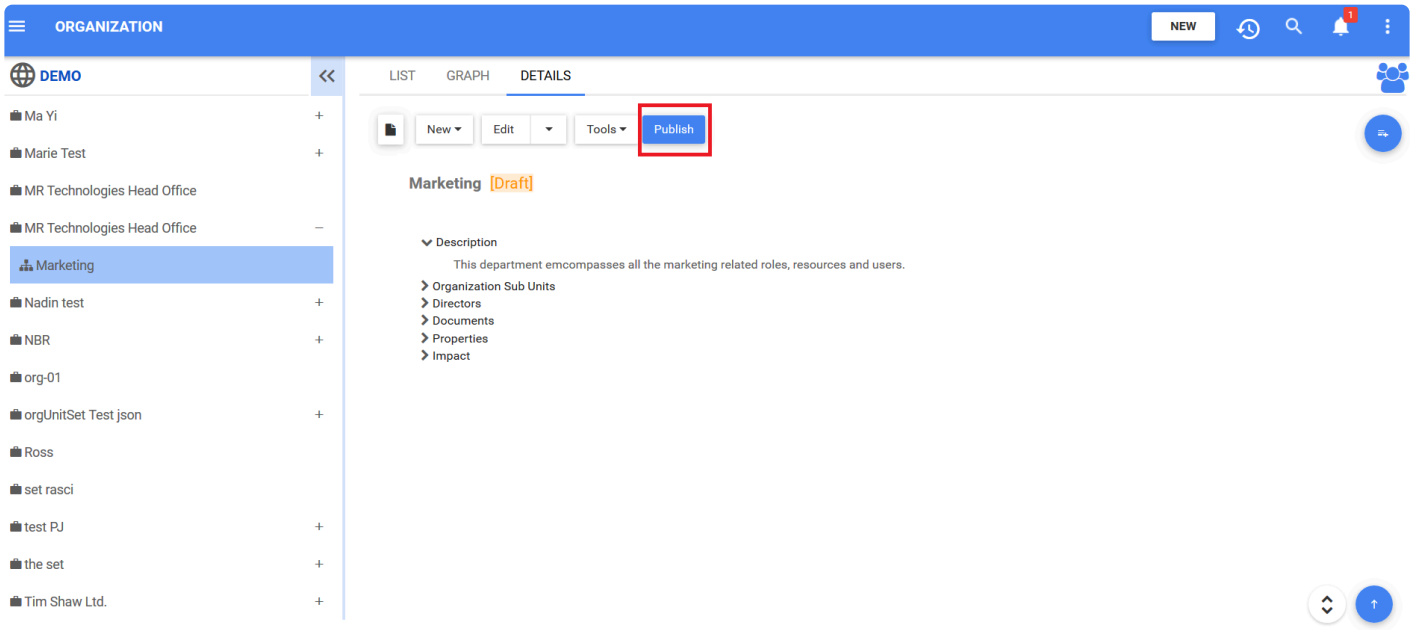
Follow the instructions to Publish an object

1. Navigate to the details section of the object that is currently a **draft**. In this example, an Organization Unit

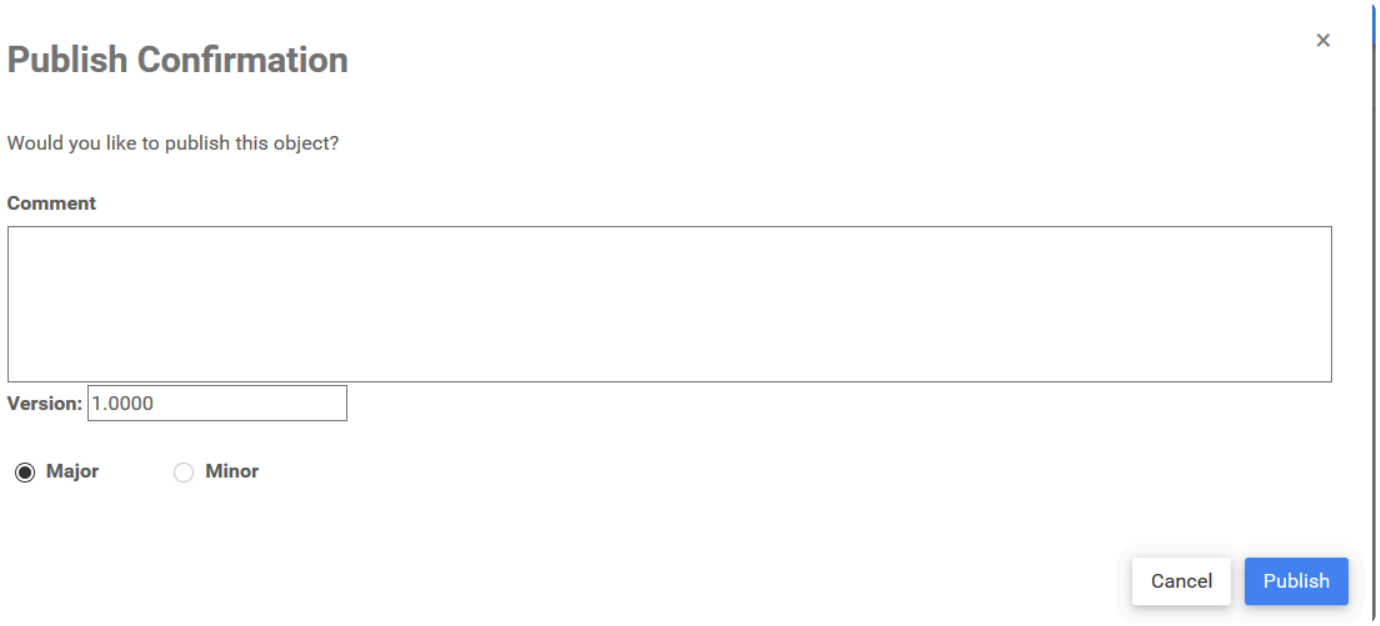


To identify draft objects, this box [Draft] will appear next to the name of the object and the Publish button will be available

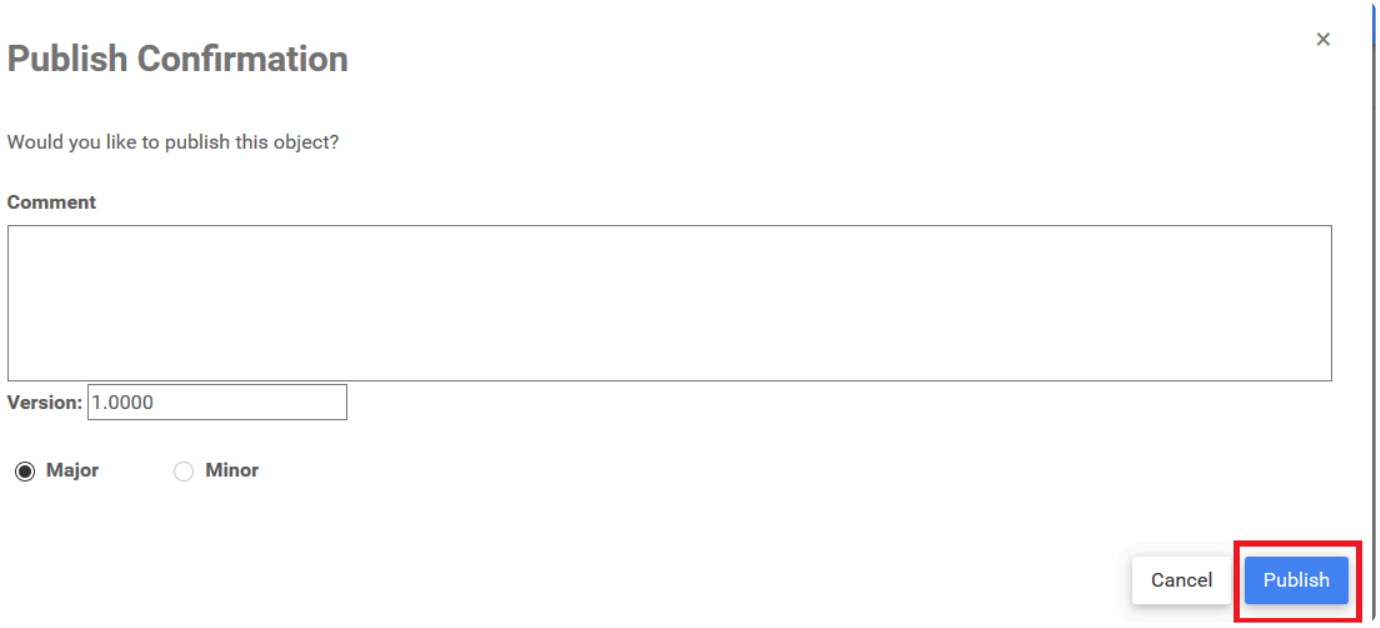
2. Navigate to the Publish box



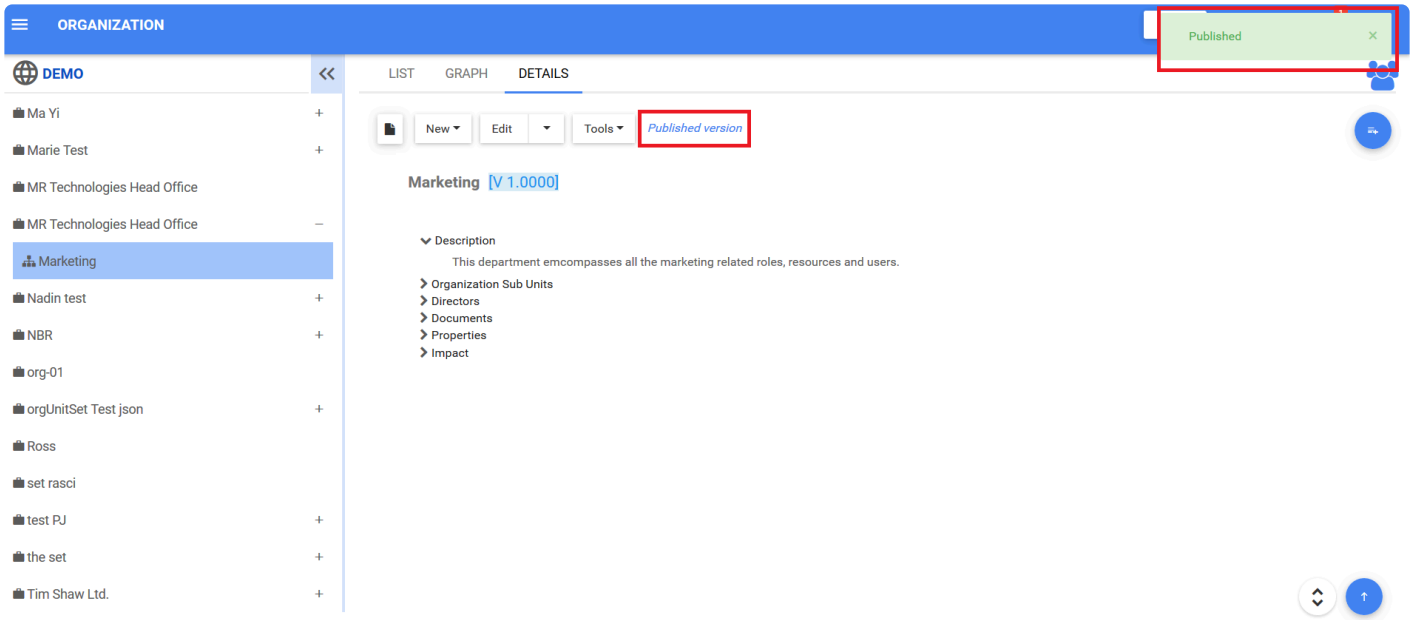
3. The Publish Confirmation window for the object will be generated. You can input a comment and view/update the version number. The version number can only be higher than the previous version number.



4. Click on the Publish box to publish the object



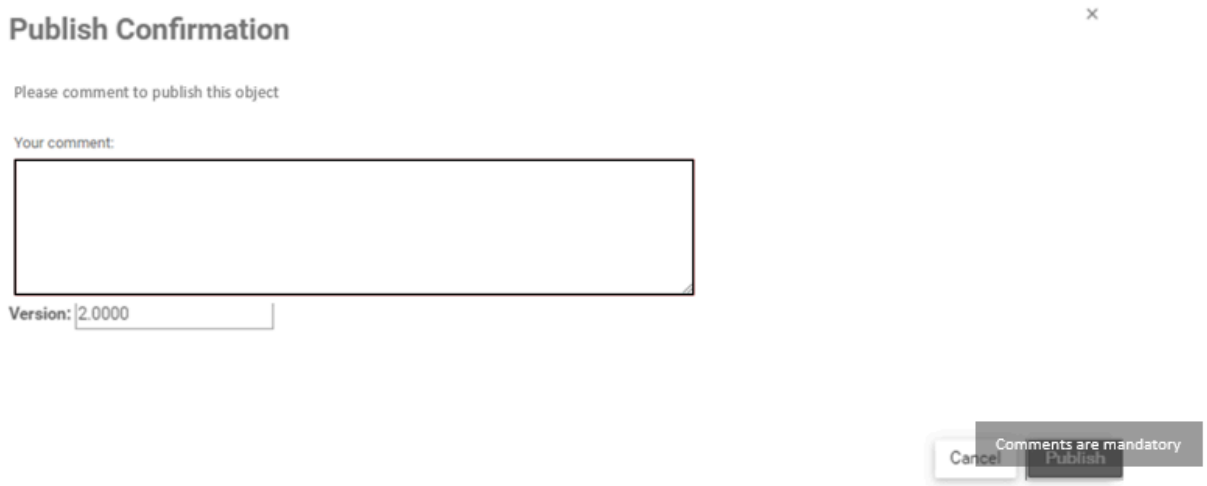
5. The object will be published. You will receive a notification saying the object was successfully published. “Published Version” will be written on top of the object’s details tab, enabling Web Modelers to know the displayed content of the object is published.



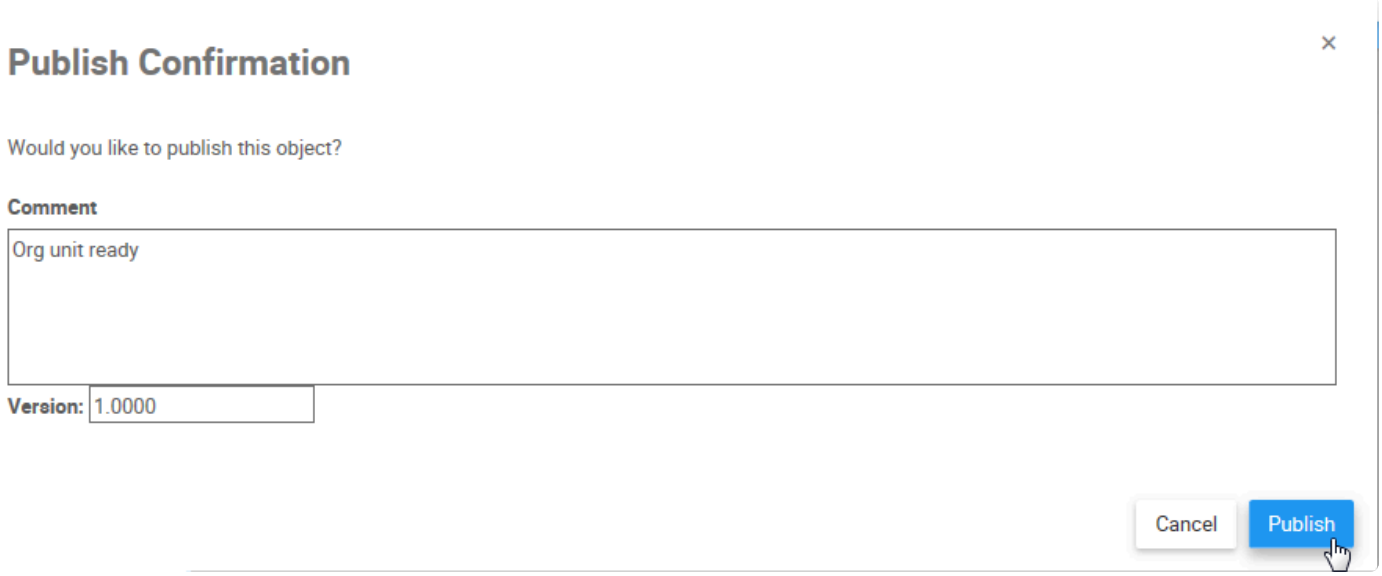
Lock

Publishing any object that is being edited by another user is prevented. The user will receive a lock error message. An example of a message is given is the Edit Lock page.

If a “Comments are mandatory” text appears when hovering over the publish button with the cursor, it is because a mandatory commentary feature is set ON while the comment box is* empty * during an attempt to publish an object.



When a comment is written on the box, the ability to publish will appear and publishing will proceed.



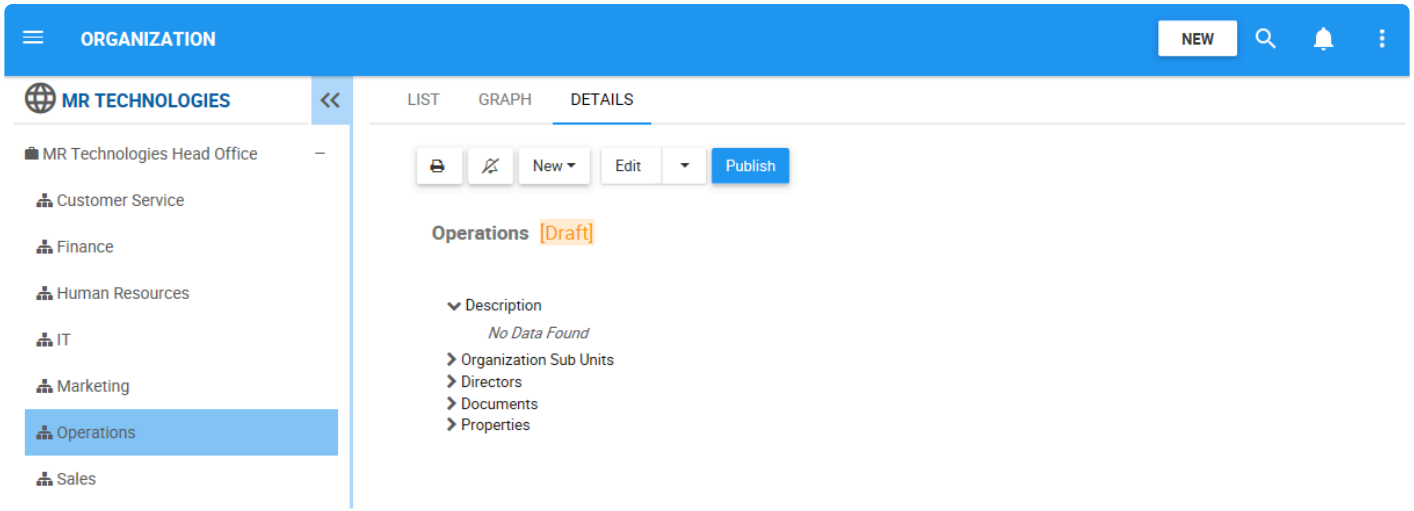
12.1.3.11 Displayed Content

Web Modelers can save EPC objects either as a **drafts** or as **published**.

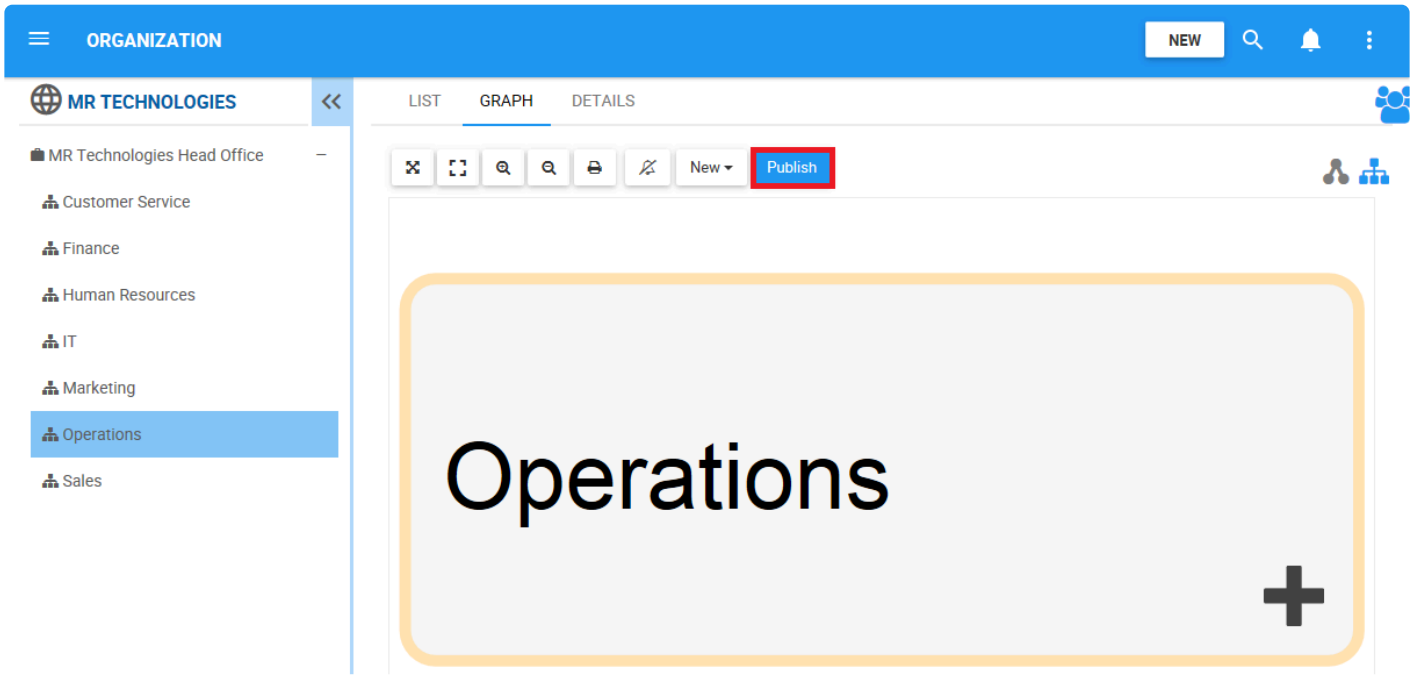
Draft

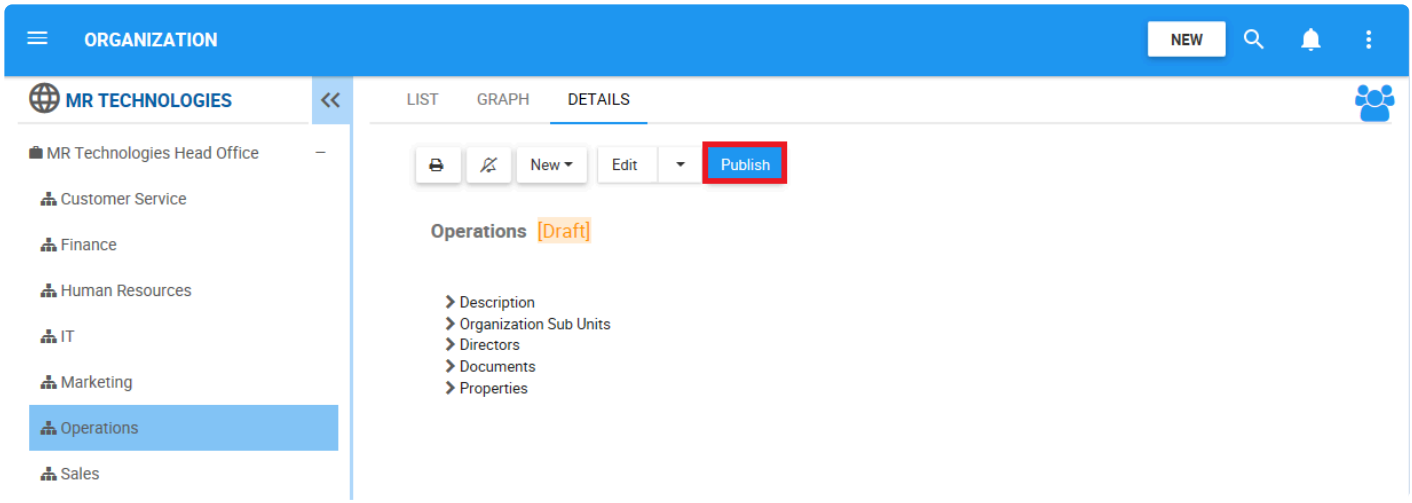
An Object in draft can only be viewed by Web Modelers, this object is a work-in-process, and is not ready for all users with permission to view it on the Web App.

- The [Draft] box will appear on the Details tab of the object.



- The Publish button will be available for draft objects on both the Graph tab and the Details tab

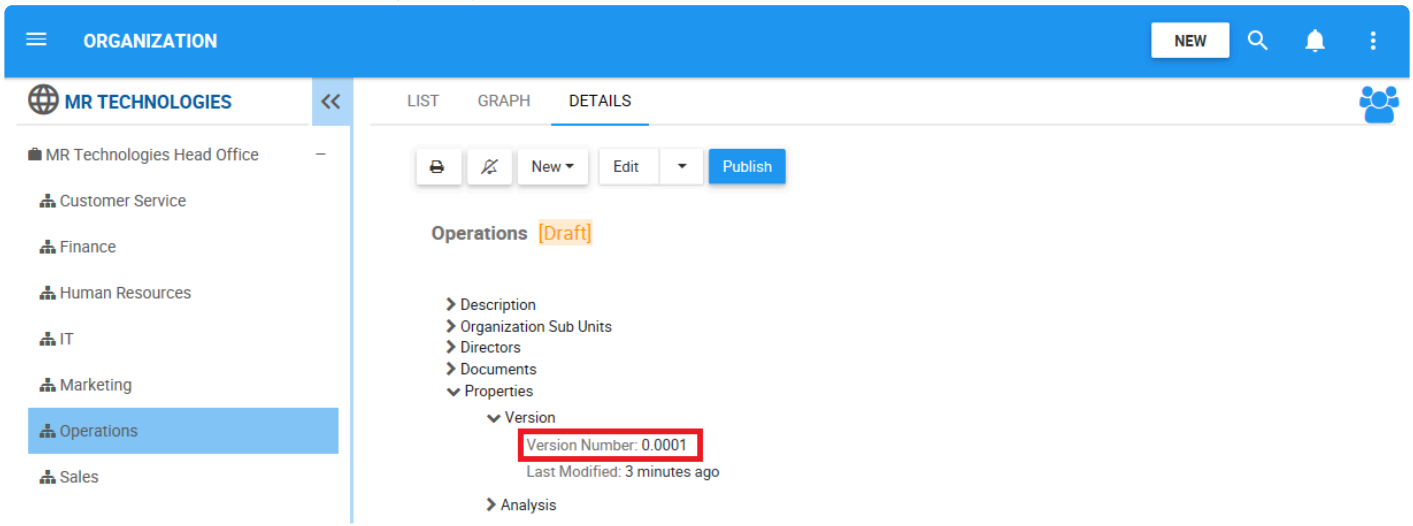




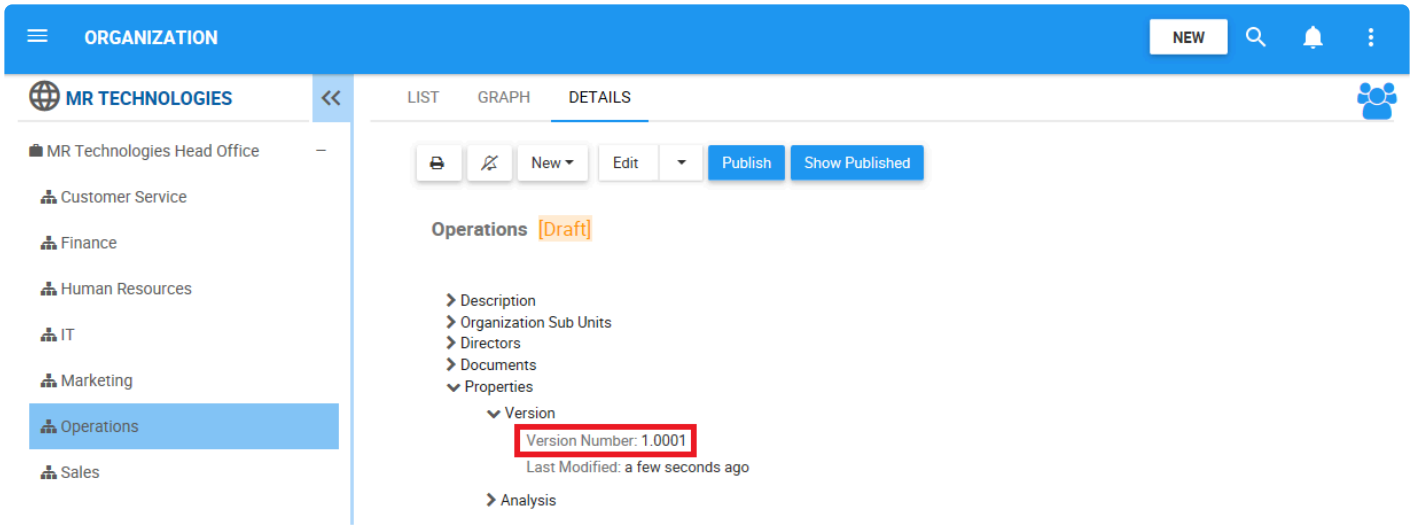
- If the object is a draft, the version number will have a decimal numerical value. The decimal value will increase when new draft versions are created.

> The draft version number will **never** be a whole number, always with a decimal value.

Draft Version before publishing: Only decimal values



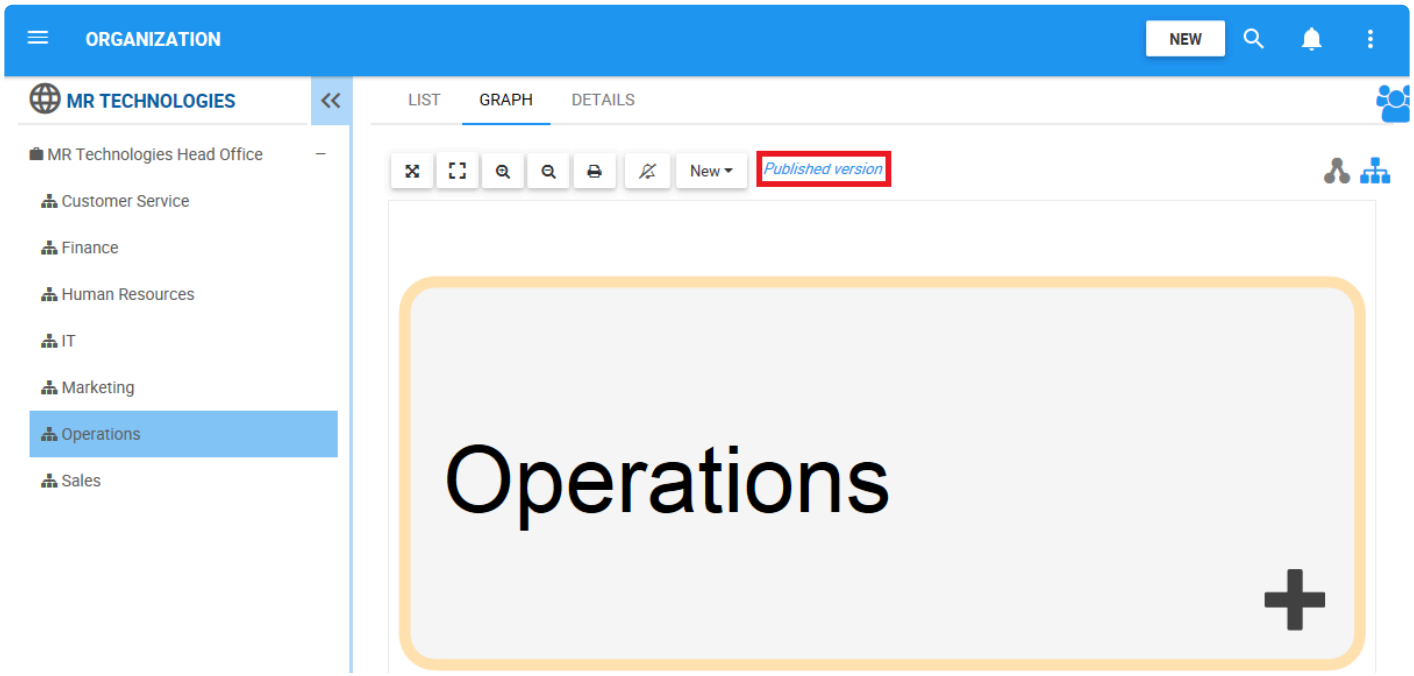
Draft Version after publishing: Whole number with decimal values

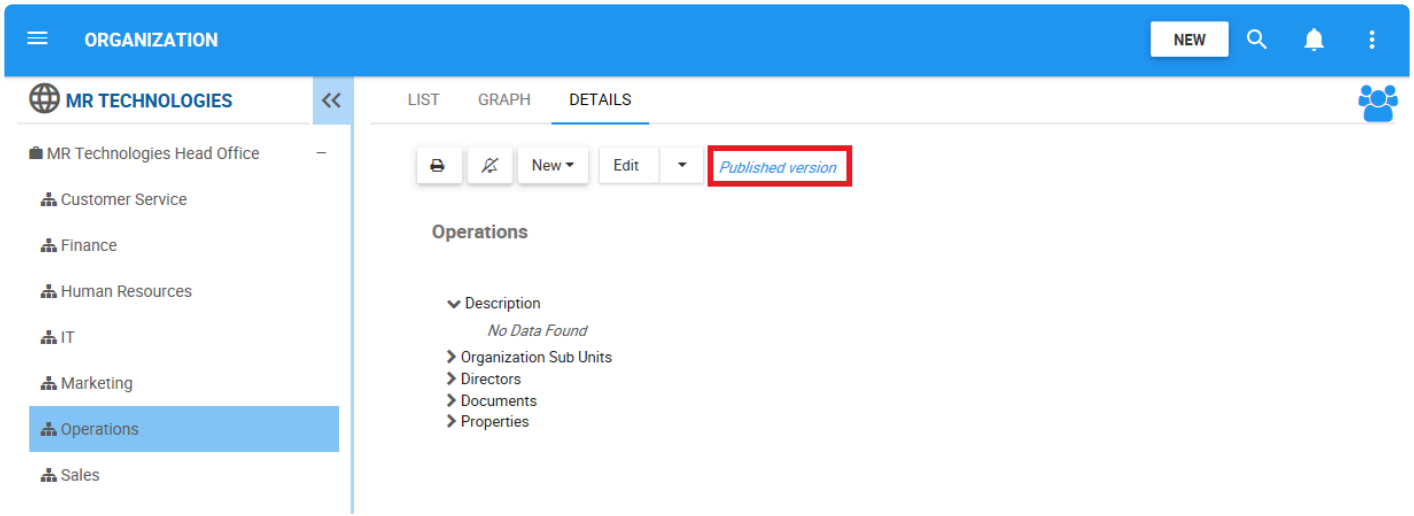


Published

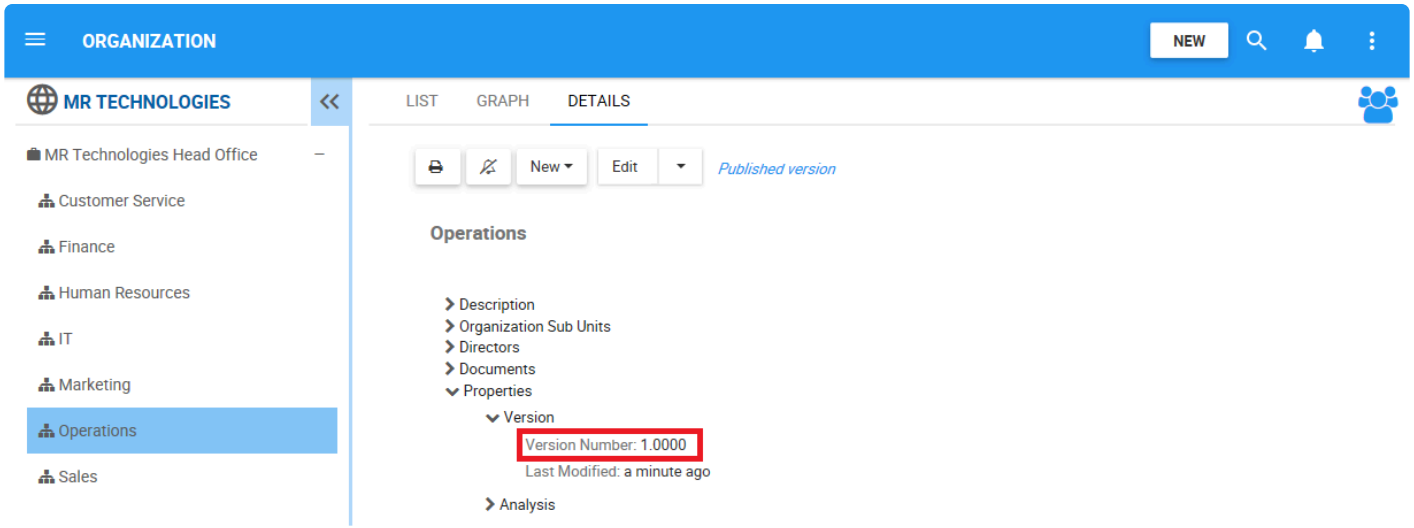
Web Modelers publish objects when they are finished editing it. A published object is ready for all users with permission to view it on the Web App

- *Published version* will appear next to the toolbar on the Graph and Details tab



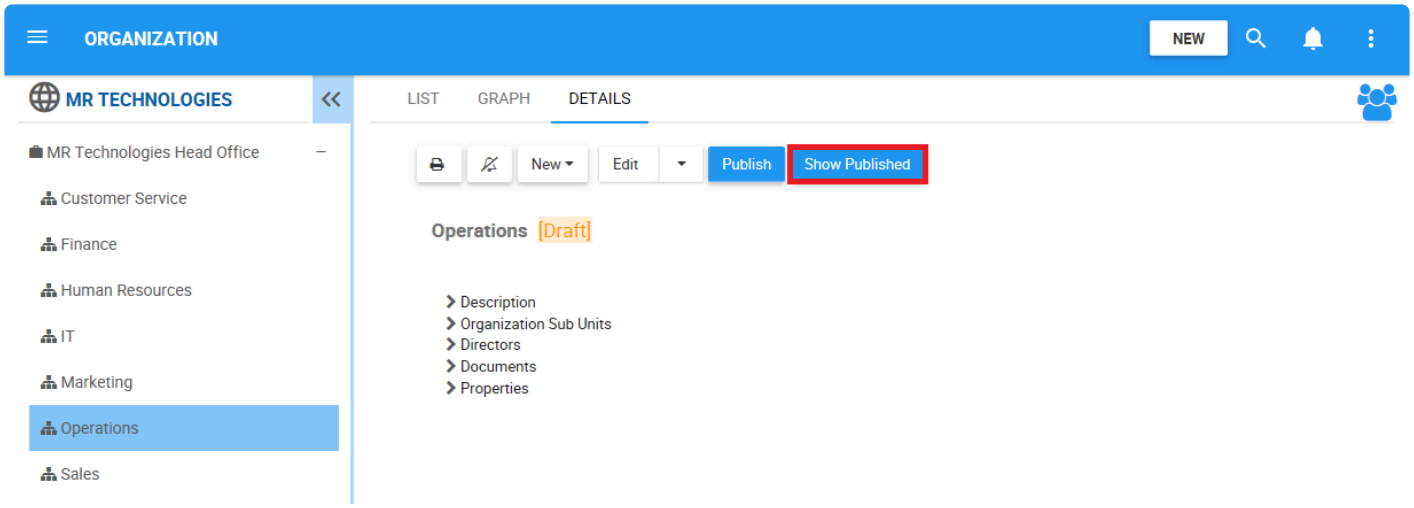


- The Publish button will be **disabled**
- The version number will be a whole number when the object is published.



Show Published Button

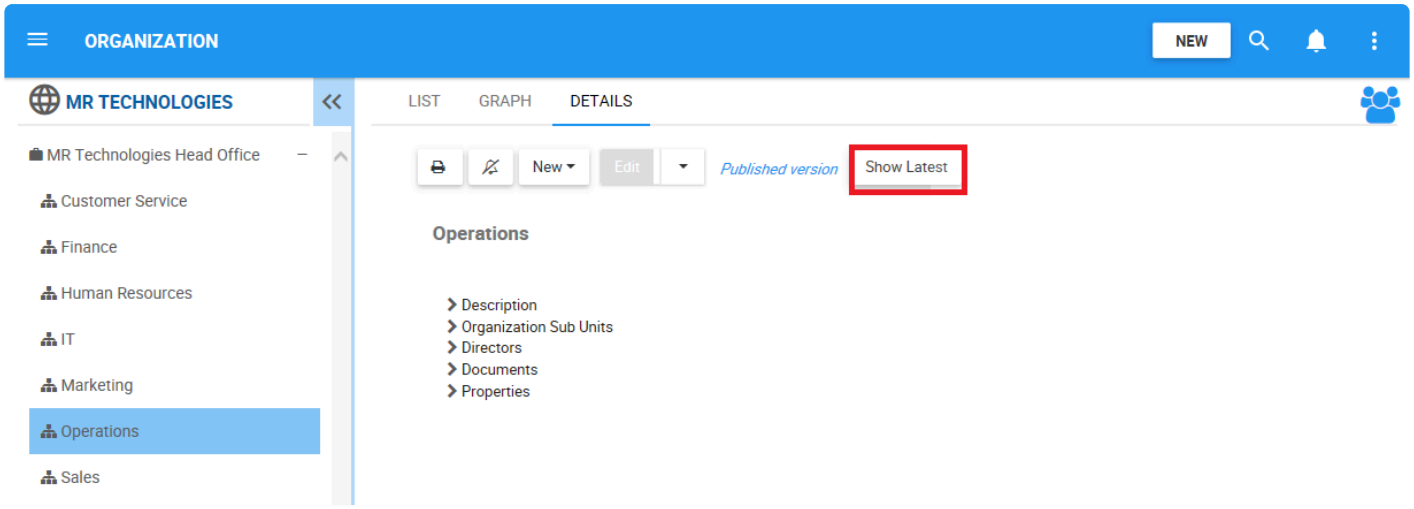
If the object was previously published and currently a draft, Web Modelers can navigate and click on the Show Published box to see the Published Content.



Show Latest Button

If the object was previously published, currently a draft, and Web Modelers are viewing the Published Version, they can navigate and click on the Show Latest box to view the content in draft.

> If Web Modeler is viewing the Published version of an object that also has a draft, the Edit button will be disabled. The Edit button will be available once he clicks on “Show Latest”



12.1.3.12 Tools

The tools menu contain additional functionalities for all EPC objects:

- Audit Trail

The following features are only available in the process module

- Localization
- Analysis Report
- Compare Versions

12.1.3.12.1 Audit Trail

An audit trail is a chronological set of records that provide documentary evidence of the sequence of activities that have affected an EPC object at any point in time. It concerns itself with who did what, when, where and how. The EPC records modifications made to objects, and as such, allows users to download audit trails in the form of an excel spreadsheet.

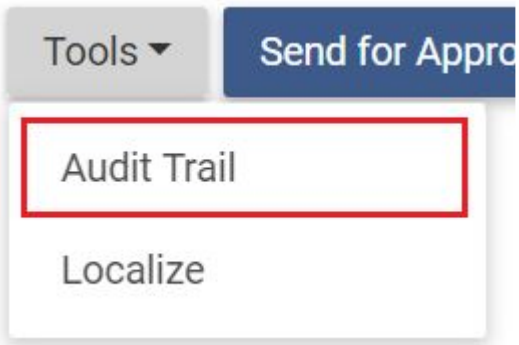
Downloading an audit trail

The audit trail is available for the following EPC objects (including sets and folders):

- Process
- Performance
- Organization
- Documents
- Risk
- Control
- Rule
- Master Data

To download the audit trail, navigate the the EPC object from which you want to download the audit trail for. Under tools, click on “Audit Trail”.

> The Tools menu is only available in the Details view of each object, with the exception of the Process object, where the audit trail is available in both in the Graph and Details view.



An .xls file will be downloaded to your computer.

Audit Trail Content

At the top, the name & current version of the object will be displayed

Column Name	Description
Object Name	The name of the object that was modified
Object Type	The type of the object that was modified
Version Number	The version of the object at the time of modification
Last Modified By	The user responsible for the modification
Date	The date of the modification
Type of Change	The type of modification made to the object
Field	The field which was modified
Language	The editing language at the time of modification
Action	The specific modification made by the user
Old Value	The existing value prior to the modification
New Value	The modified value
Target Type	The target of any associations created or modified

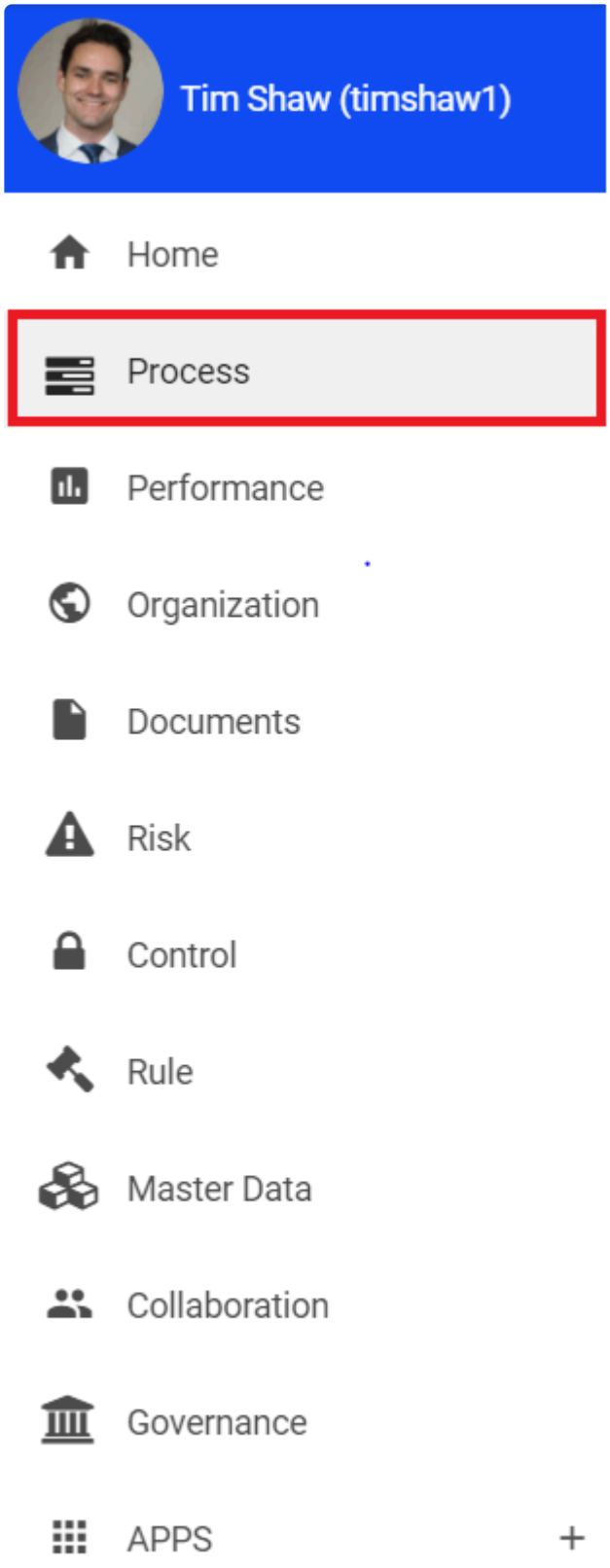
© 2020 Interfacing Technologies Corporation

12.1.3.12.2 Analysis Report

Users can generate Customized Process Analysis Reports, featuring information about specific sub-processes or flow shapes they choose to select. These customized reports allow users to generate specific Process Analysis Workbooks, exclusively featuring information about flow shapes they select.

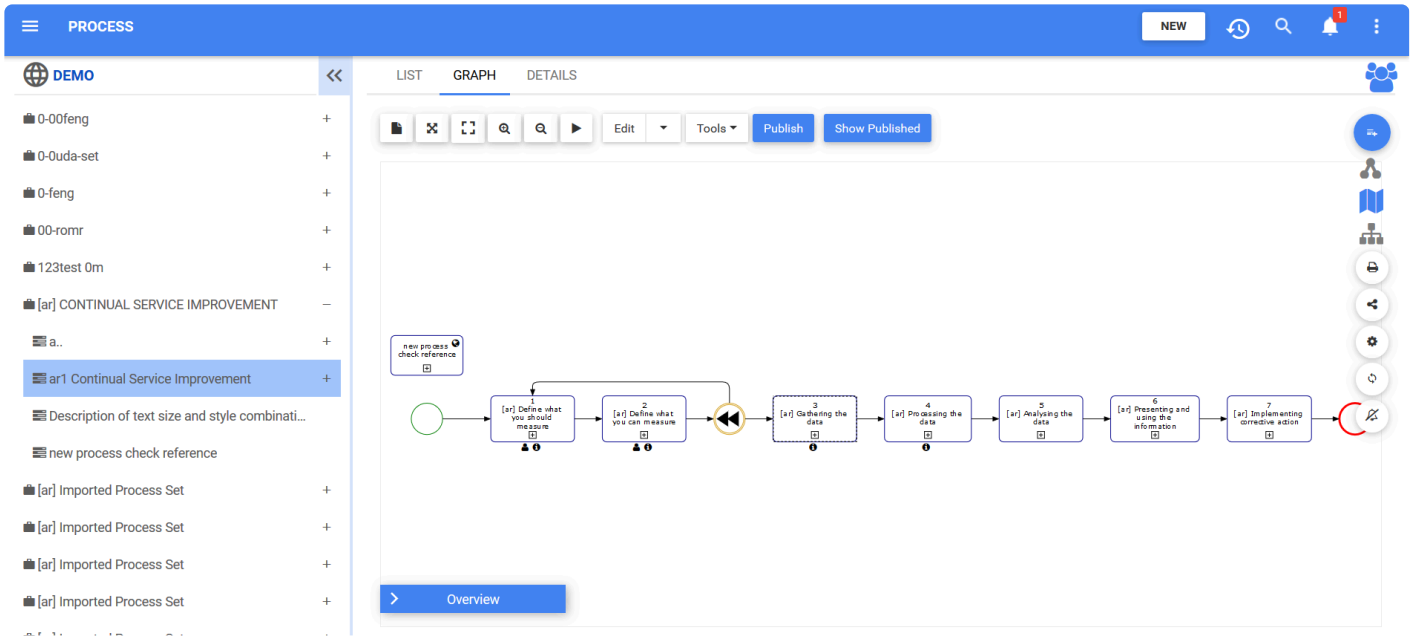
To generate customized process analysis reports:

1) Navigate to the Process Module

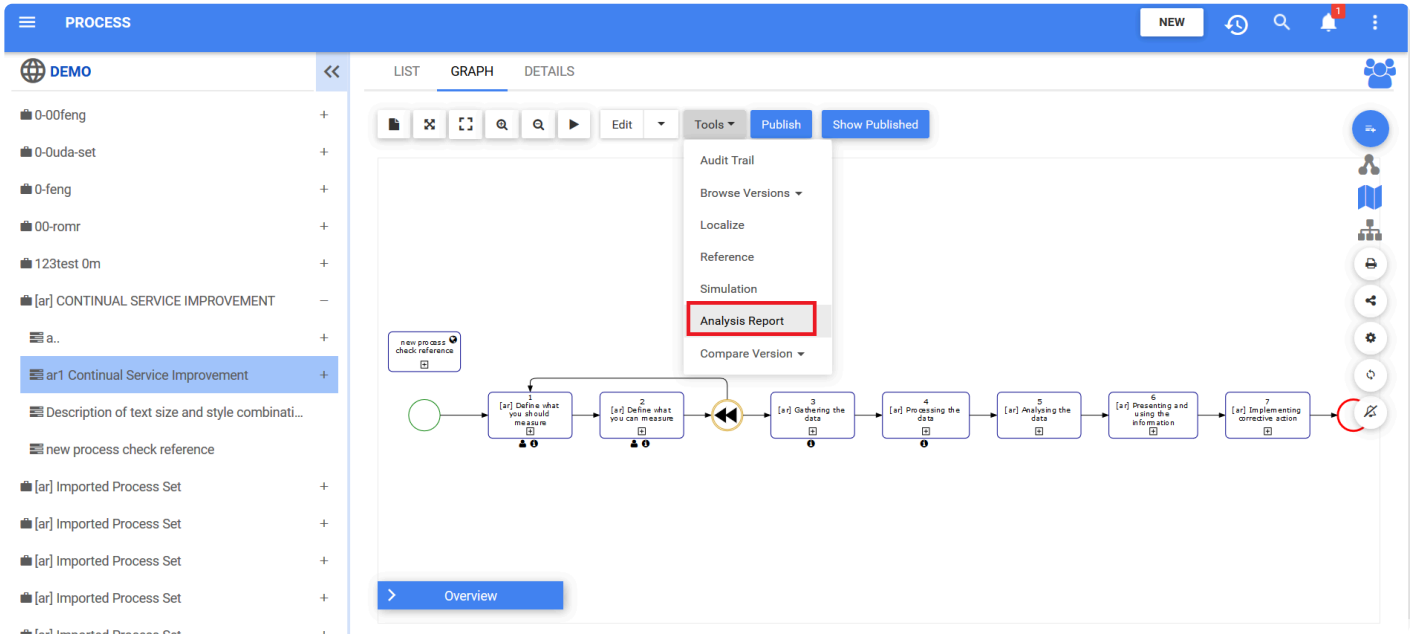


2) Select a Process

3) Select the desired flow shapes (Ctrl + Click)



4) Click on Analysis Report

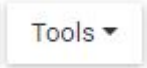


12.1.3.12.3 Compare Versions

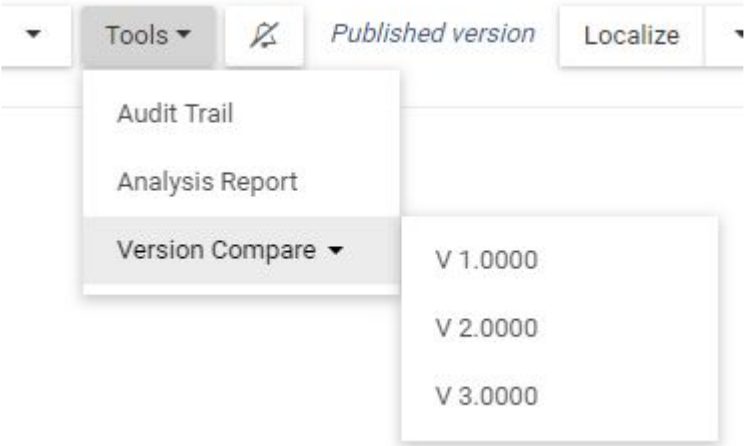
Over time, a company's processes or rules can change significantly. Referring a previous version of a this object allows an user to see what has been improved, or conversely, if the new process or rule is more ineffective than the previous. The EPC allows users to compare the current version of an object to all previously published versions. This feature will highlight any changes from the selected version to the current version.

To compare the current version of an object to a previous versions:

1. Navigate to the tools menu

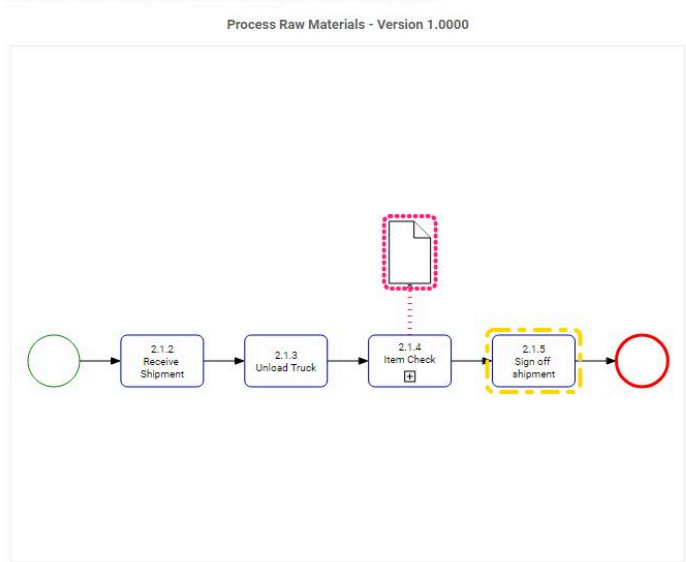


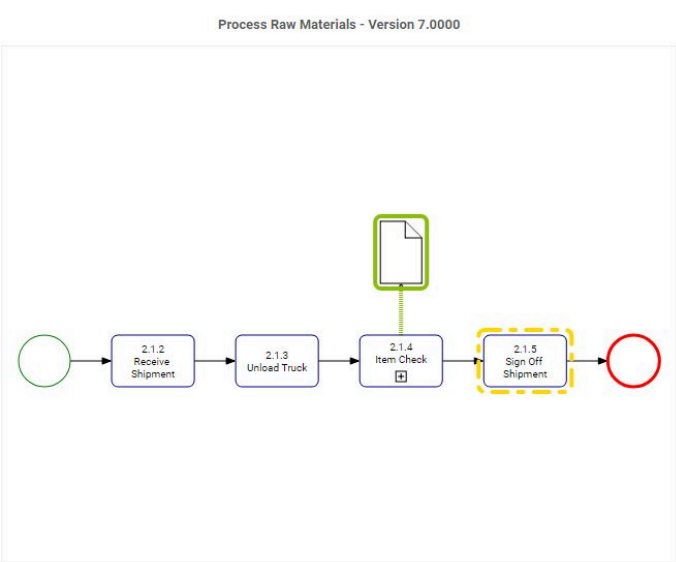
2. As you hover your mouse over "Version Compare", the menu will be expanded and show all previously published versions.



> If the process has never been published, the expanded menu will show "No previous versions"

3. Click on the desired version number. The compare windows for process will appear, with the selected previous version in the left window and the current version in the right panel.





Compare versions can be used with rules, swimlanes, highlights, node and performance colors, shape types and groups. For more information on graph map options, see the Options section.

> **!** Compare previous versions is not compatible with sub-process and IPL expansions turned on. If an IPL or a sub-process is expanded and the user compares previous versions, the IPL and sub-process will be collapsed.

Rule
When a user wants to see “Version Compare” of rules, the object must have an older publish version
When a user wants to see the compared versions of a rule, the option will available both when rules are in draft or published mode
When a user clicks on “Version Compare” in Tools, the details tabs should expand and present the old and new rules side by side
When a user is seeing the comparison of rules on “Version Compare”, then the user should see elements that were added highlighted in green, and elements that were deleted highlighted in red

12.1.3.12.4 Localization

Localization refers to the practice of adjusting a process' properties and characteristics to accommodate differences in location, product or service. The EPC allows users to create local copies of a process, and designate those copies by location or product and service.

Why is localization useful?

Many companies have operations around the globe. When mapping a process, modelers might encounter a different process flow that is caused by location, or even by product & location. Take a manufacturing process for a particular product as an example. Customers in one country may not have the same tastes as a customer in another country. The manufacturing process might then be different from country to country to accommodate for this difference in taste. However, the manufacturing process for that product remains largely the same.

Localization in the context in EPC is useful because it allows the user to create local copies and then tweak them, instead of having to re-map that manufacturing process for each country. Localization is useful when processes are similar, but have slight differences caused by various factors: political, legal, geographical, social, etc. The localized copy also retains its relationship with the source process (the process from which it was derived from), making management easier across location or product and service.

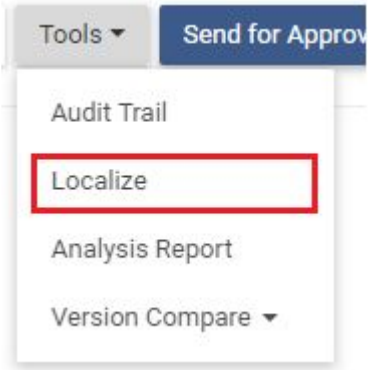
Creating a localized copy of a process and their sub process(es)

> Your System Admin must have set up the proper localization values

To create a localized copy of a process, navigate to the process of your choice.

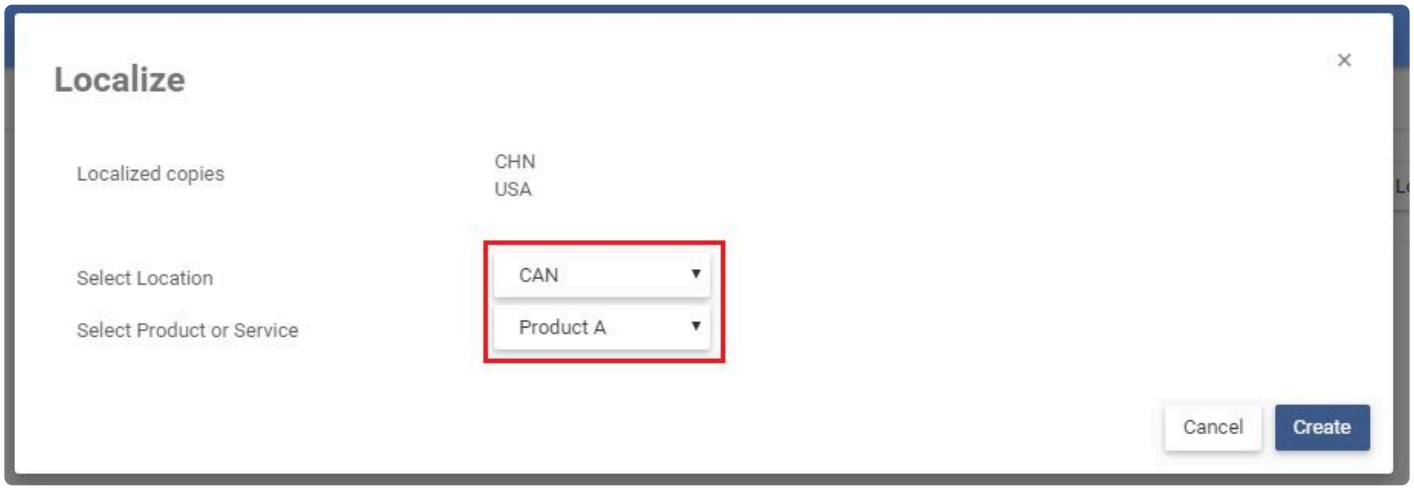
1. In the Graph of Details view of the process, click on the Tools menu to expand it.

2. Select "Localize"



3. The creation prompt will appear. Use the Location and Product or Service drop downs to select localization values

> The prompt will show existing local copies for that process. If you attempt to create a local copies using values or a combination of values that have already been used, the local copy will not be created.



4. When you have selected the localization values, click “Create”

5. You will be re-directed to the newly created localized process

There is two different scenarios that can happen while localizing a process with sub process(es)

1. Given that the parent process nor it children process were ever localized before, when a user localize the parent process to a location(e.g. CAN), then the parent and all its children of all levels will be localized for that location as well.

2. Given that a parent process was never localized to a location (e.g. CAN) and one of the parent’s sub process(es) was already localized to CAN, when the user localized the parent process to the same location, then it will create a shortcuts of the already localized sub process(es) in the parent’s parent localized version.

> TIP: Rename the localized process in order to make it easier to identify in which process the user is currently in.

For more information on how to toggle between local versions of a process, click here

Tips & Tricks

Localized copies behave much like regular processes.

- Move: Users are able to move localized copies
- Shortcuts: Use shortcuts to refer to localized copies in other processes
- IPL: Users can link processes to localized processes

Lock

> Creating a localized version of a process that is being edited is not prevented. The user won't receive a lock error message.
> The localized version will be created with the latest saved content.

12.1.3.12.5 References

The process “Reference” option is used in cases where the same process or sub-process is repeated in one or many other processes AND **there are slight differences which you would like to capture**. A process reference is always related to its Definition, which is the process from which the reference originates.

The created reference is shown in the map of its new selected parent(s). The reference’s map, details and associations can be edited, but it will always remain connected to its Definition.
The reference’s Definition is used as a template – it provides the standard structure for specific processes and allows users to customize the details in the various instances.

Shortcuts & References Video

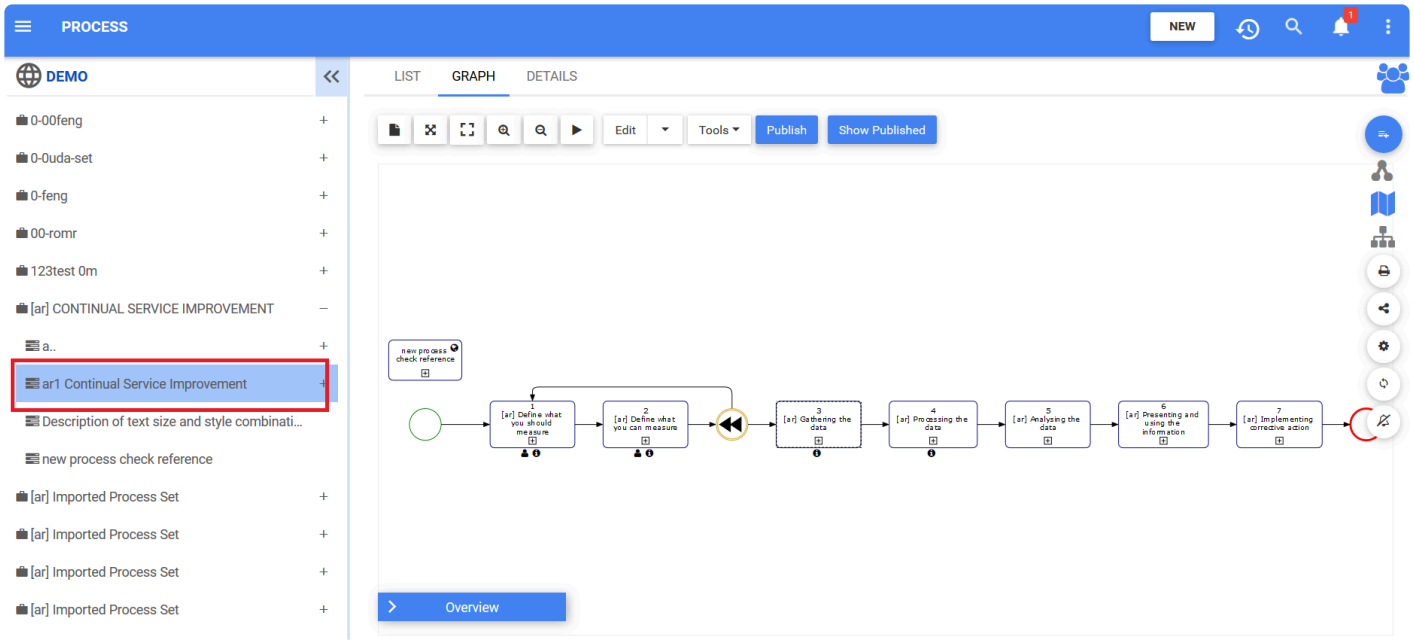
https://www.youtube.com/embed/ILqjEX73GzI?rel=0

1. Steps to create a reference

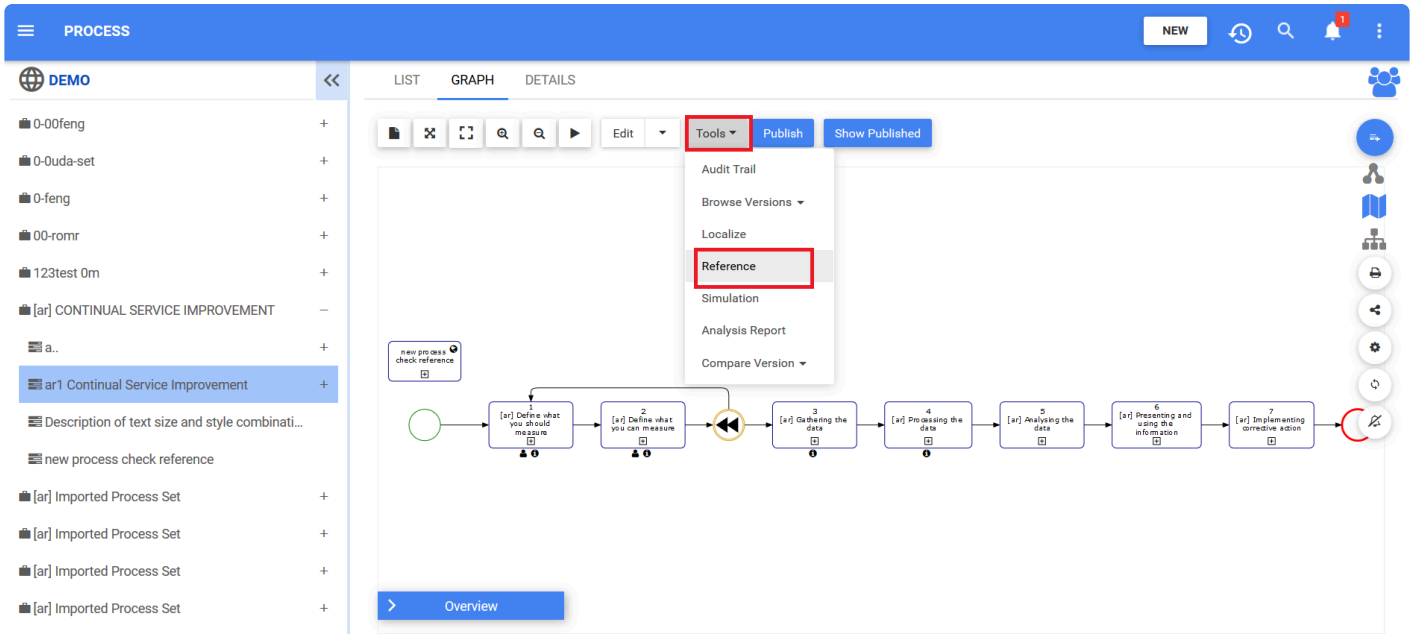
The “Tools” button is accessible from the Graph and the Details pages. The example will be

done from the Graph page.

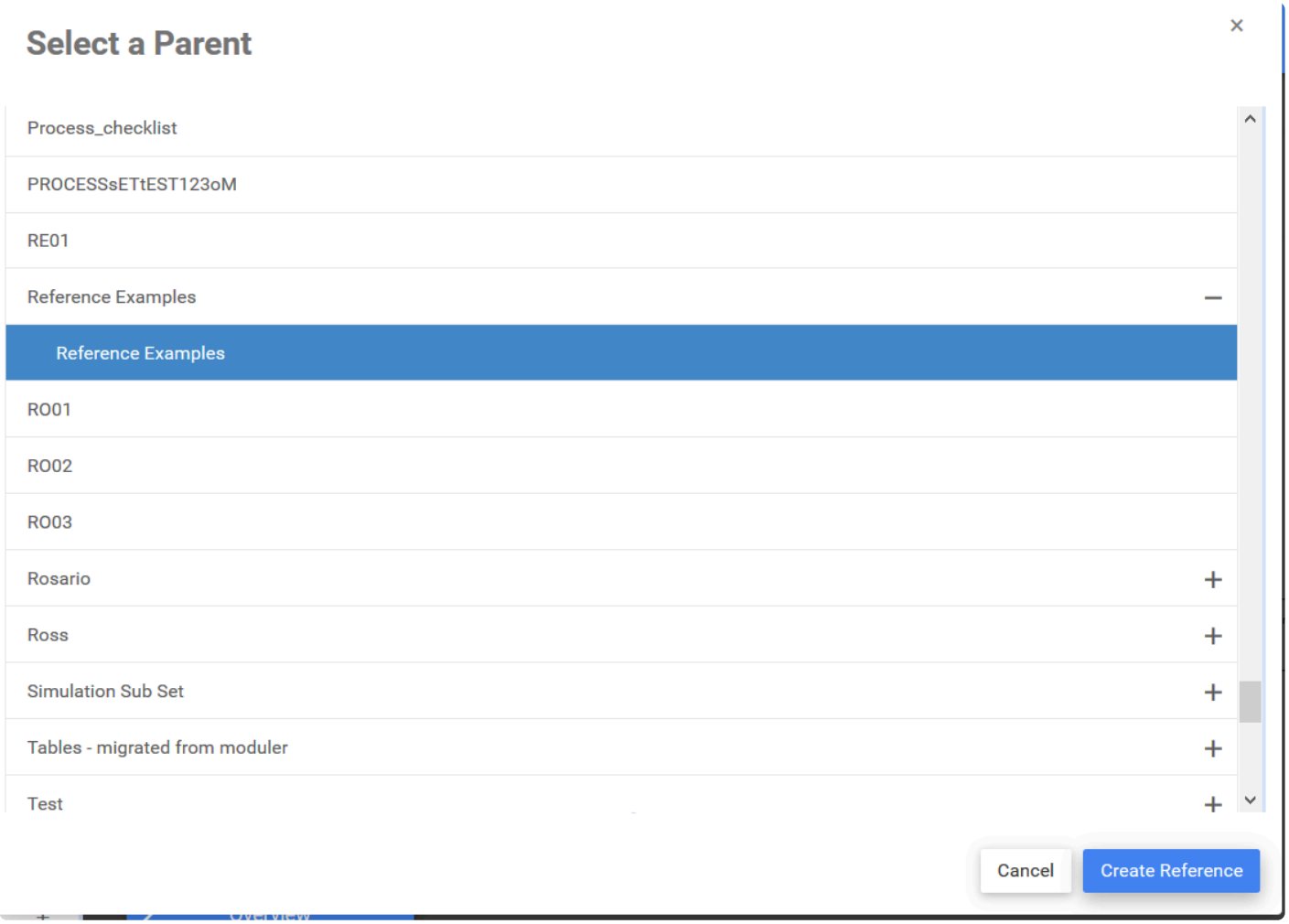
1. Navigate to the process you want to reference



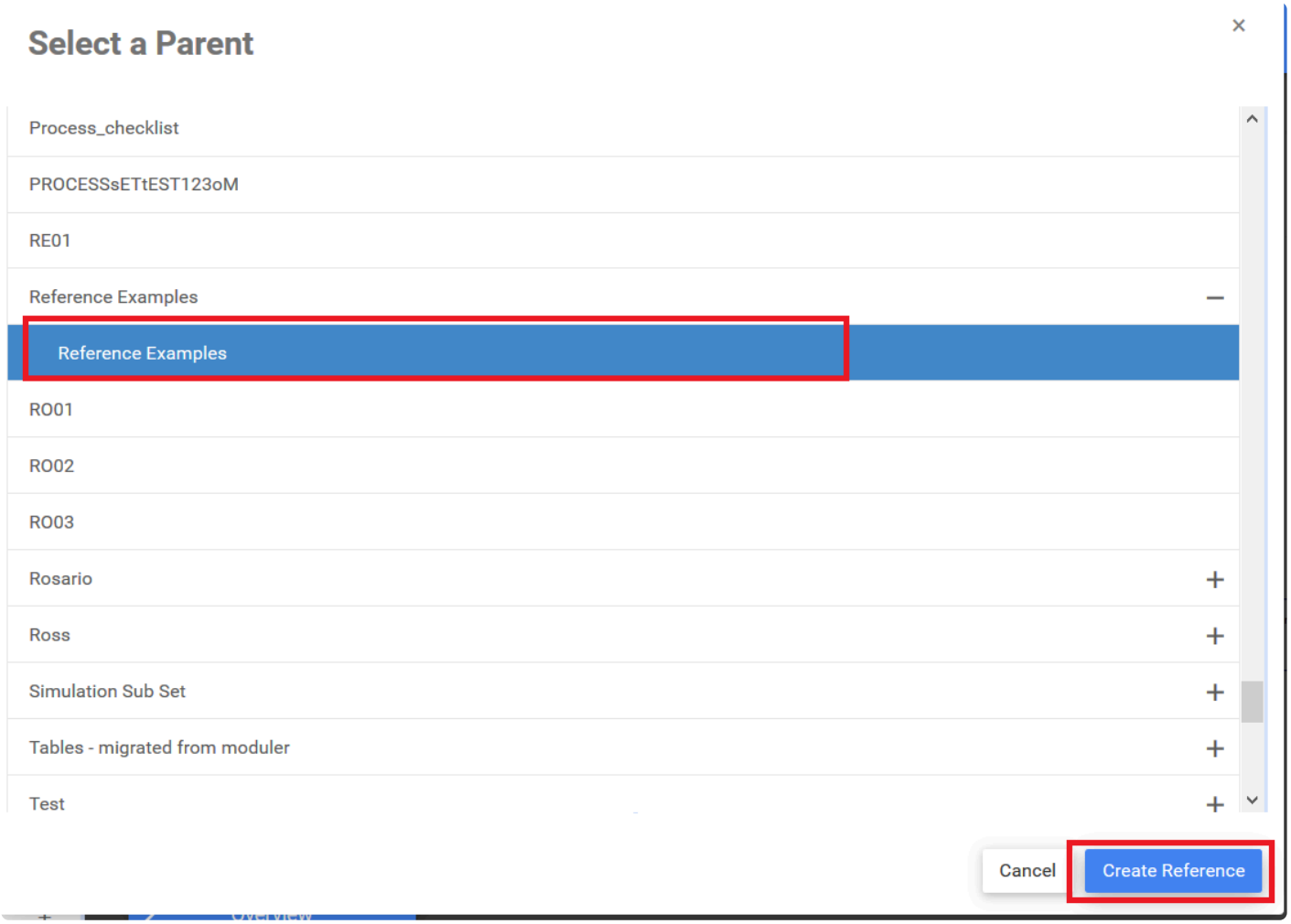
2. Click on the “Tools” button and select the “Reference” option.



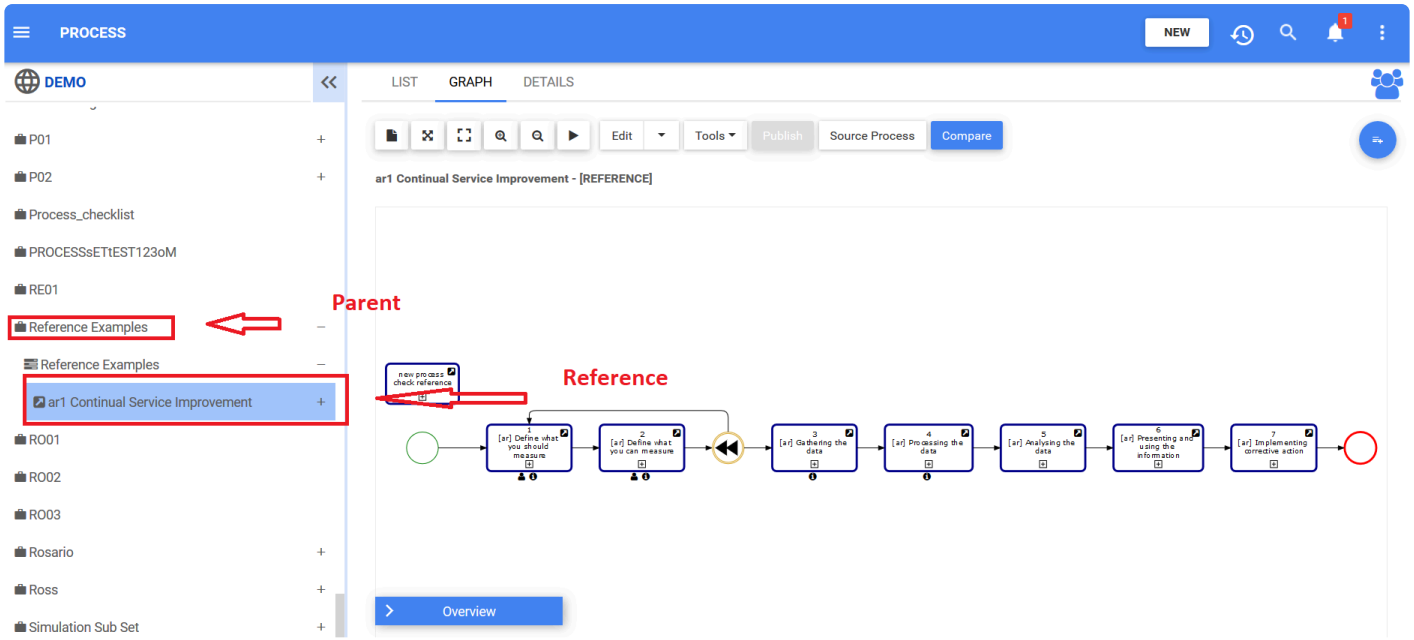
3. The “Select a parent” window will open



4. You can search or navigate around the displayed tree to locate the parent. Click on it once it is found and click on the “Create Reference” button.

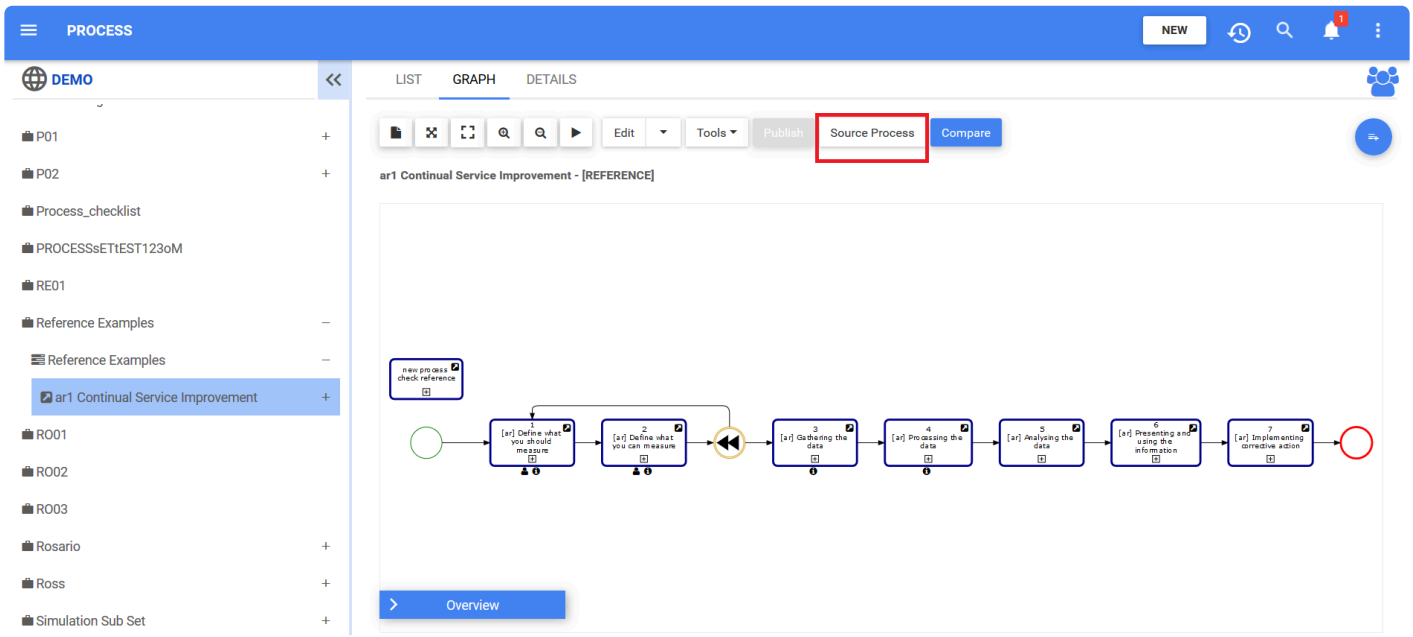


5. You are directly brought to the created reference under the previously selected parent.

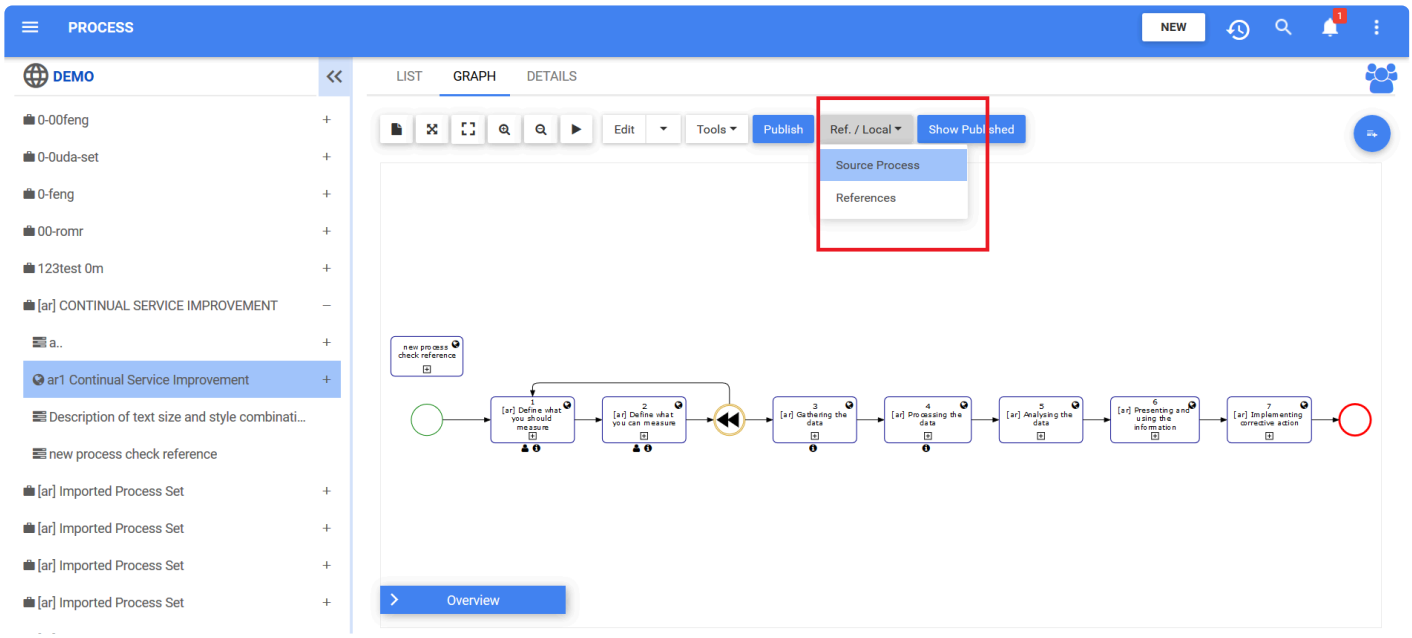


2. Toggle between a reference and its Definition

Once you are on the reference, you can select the “Show Local” button to navigate directly to its definition, or Source Process.



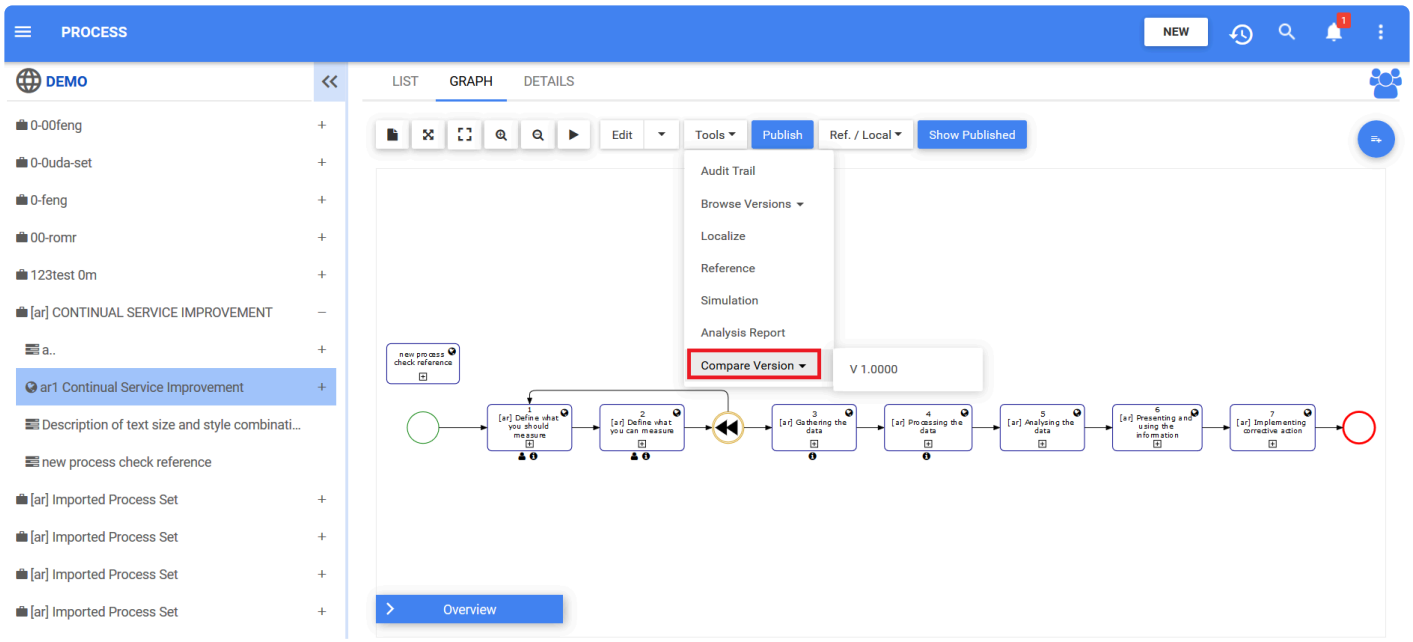
The source has the same option. It allows the user to see all references created from this Definition, and to navigate to the one they want out of the listed references.



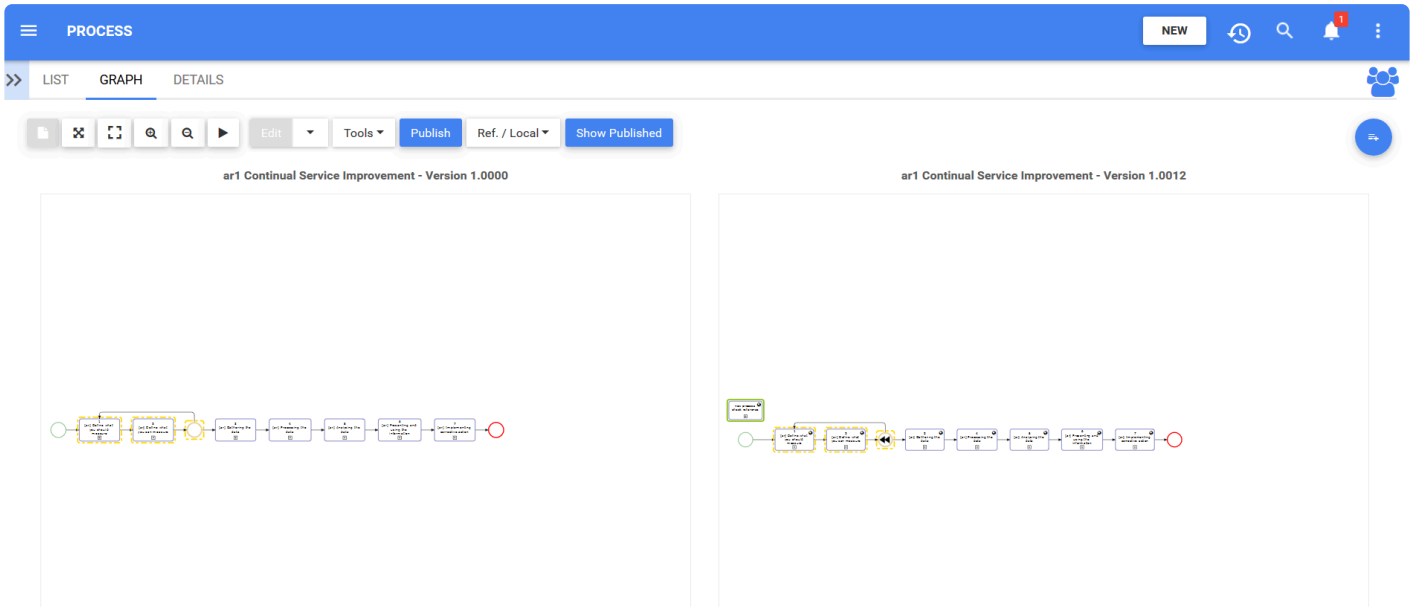
3. Compare

This option is only available in the Graph page.

It is possible to compare the reference to its source without having to go back and forth between the two objects.
When you are on a reference, the button “Compare” will be available next to the “Show Local” button.



By clicking on it, it will display both processes, and the changes made.



The “Hide” button allows you to go back to the normal Graph page of the reference.

Show Local Hide

Lock

Creating a reference of a process that is being edited is not prevented. The user won't receive a lock error message.
The reference will be created with the latest saved content.

Creating a reference under a locked process is prevented. The user will receive a lock error message. An example of a message is given is the Edit Lock page.

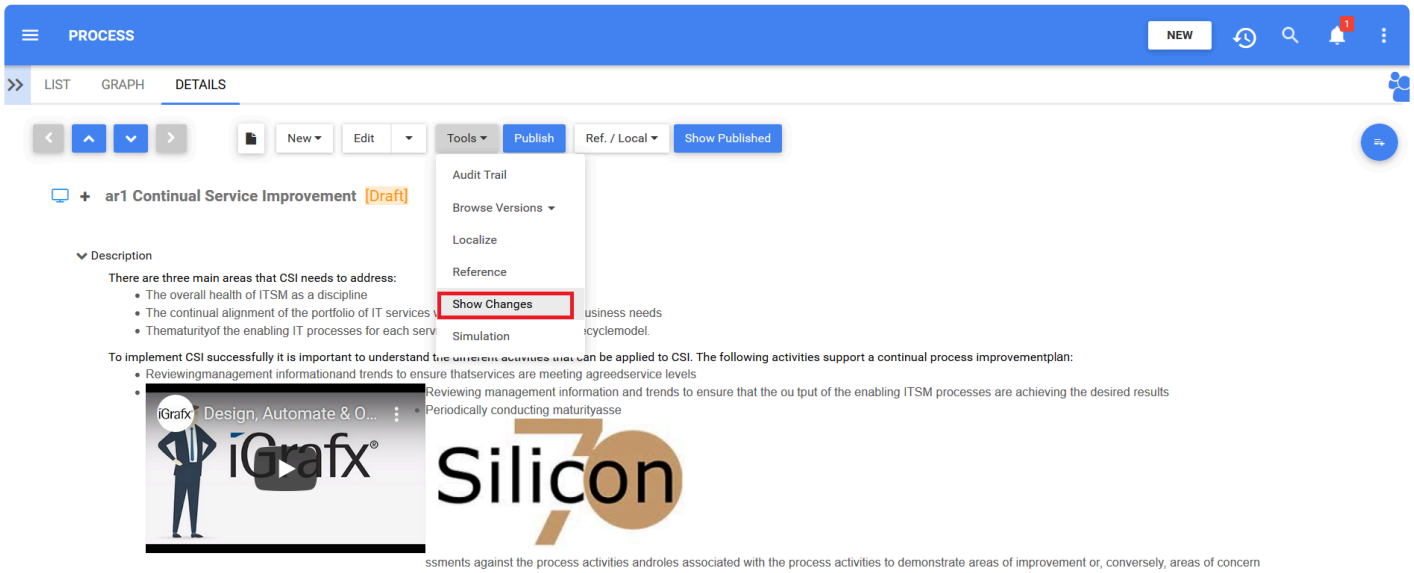
12.1.3.12.7 Show Changes

Users can use the “Show Changes” feature to compare the details page of the current version of an EPC object to the previously published version.

This feature is available on all EPC objects.

To compare your current draft, follow these steps:

1. Navigate to the details page of any EPC object. Under Tools, click on **Show Changes**

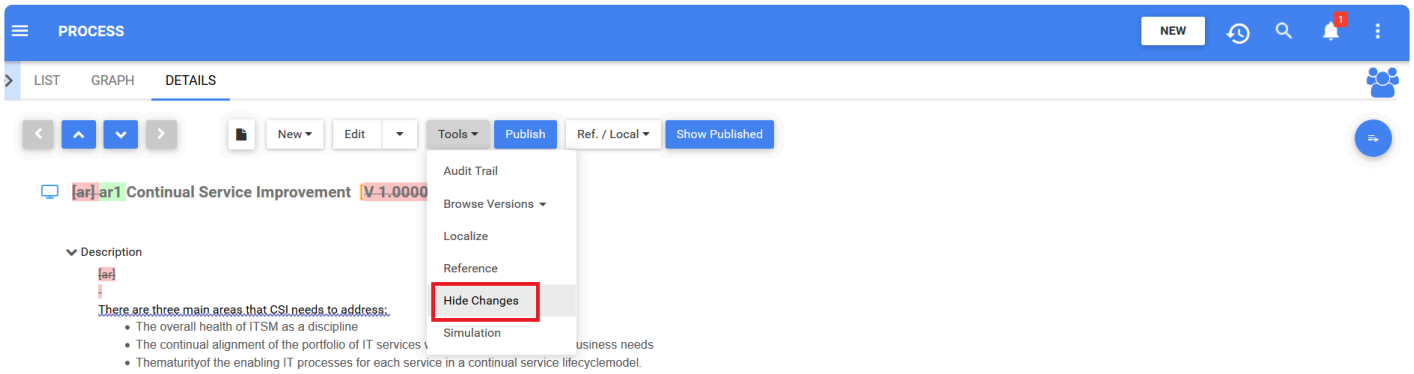


> **Show Changes** is only available on Draft versions of objects.

2. Your current draft version will be compared to the previously published version

In **GREEN** are the information that was added/changed from the previously published version to the current version
In **RED** are the information that was removed/changed from the previously published version to the current version

3. To exit the comparison, under Tools, click on **Hide Changes**



12.1.3.12.8 Browse Versions

Users are able to browse previous versions of any objects in EPC and restore them.

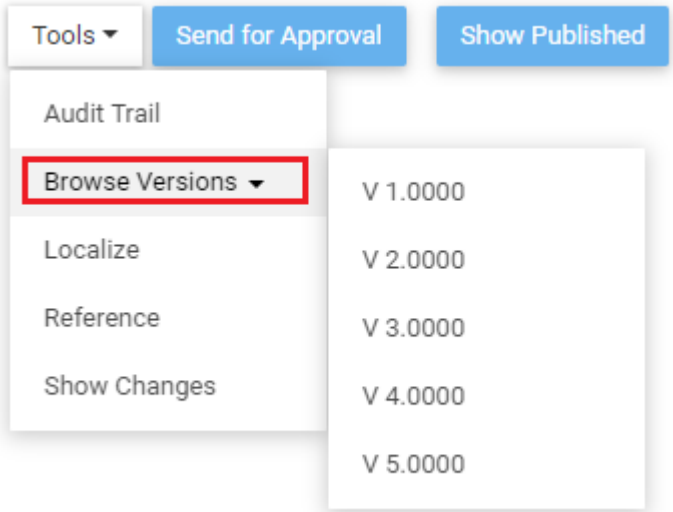
Browsing previous versions is available in the following modules:

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

Accessing a previous version

To access a previous version of an EPC object, follow these steps:

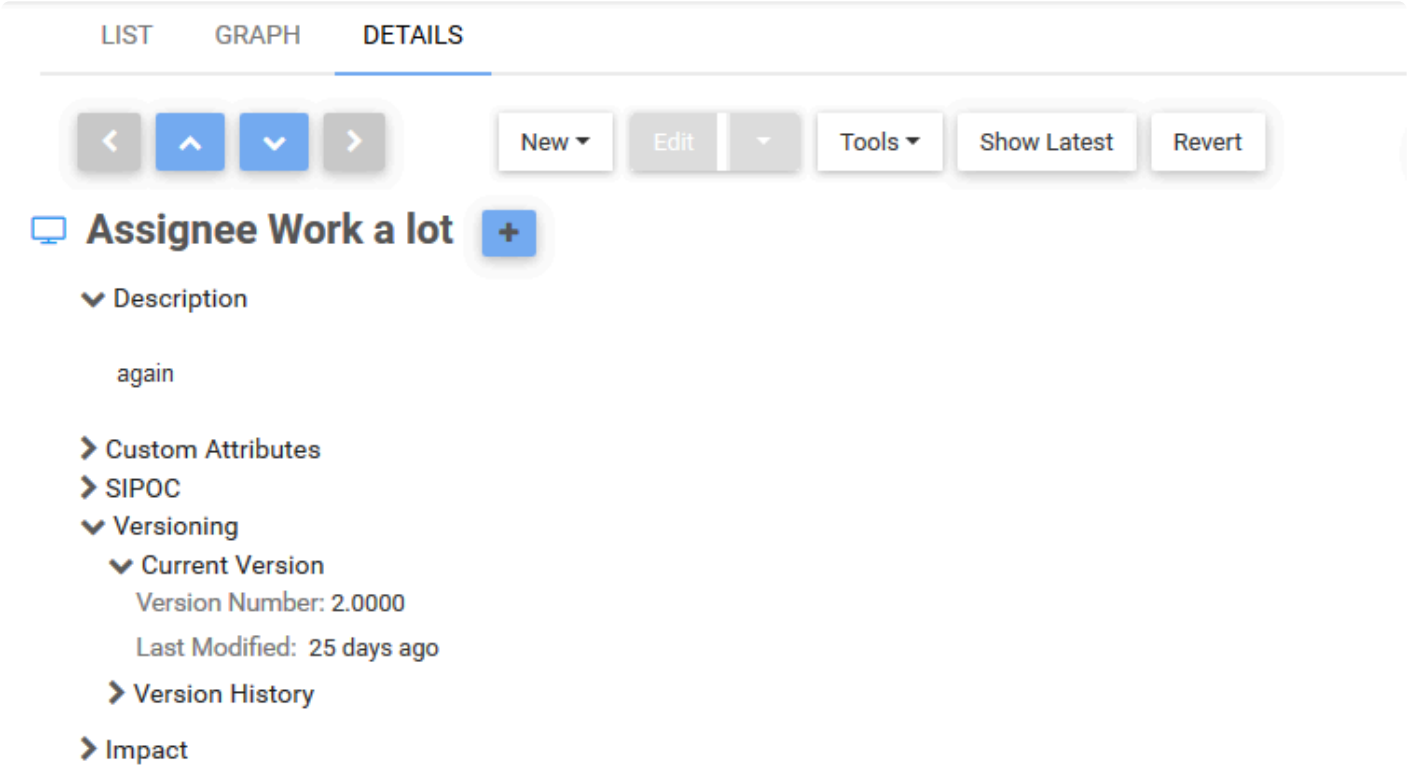
1. Navigate to the details page of any EPC object. Under **Tools**, hover your mouse over **Browse Versions**. Click on the version number you wish to see.



> ! Only published versions are accessible. Note that the latest published version of the object will not appear in this list. To access the latest published version, click on **Show Published** (refer to this section for more information.)

2. You will be redirected to the selected version of the object. Note that you will not have edit capabilities

while on a previous version.



3. To navigate back to the latest version, click on **Show Latest**

4. You can also navigate to other versions by repeating step 1.

5. To restore this version of the object, click on **Revert**. For more information on restoring objects, refer to the Revert Previous Version section.

Restrictions

The following functionalities will be disabled while the user is viewing an older version of the object.

- Copy
- Move
- Delete
- Object Book
- Impact List

You will be able to navigate to the following graphs, but they will not reflect historic information. They will always show the latest information of the object.

- Impact Graph
- Hierarchy Graph
- Data Diagram for the Master Data Module

12.1.3.12.8.1 Revert Version

Users can revert an object to an older version.

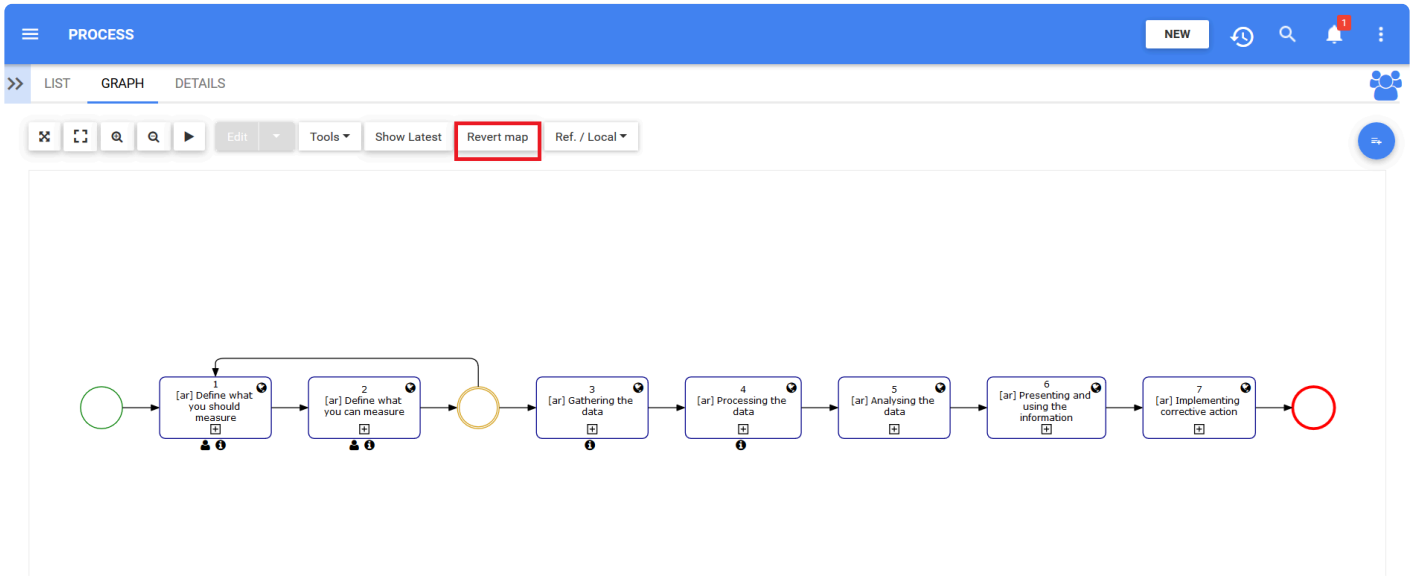
Revert is available for the following modules:

- Process
- Documents
- Performance
- Organization
- Risk
- Control
- Rule
- Master Data

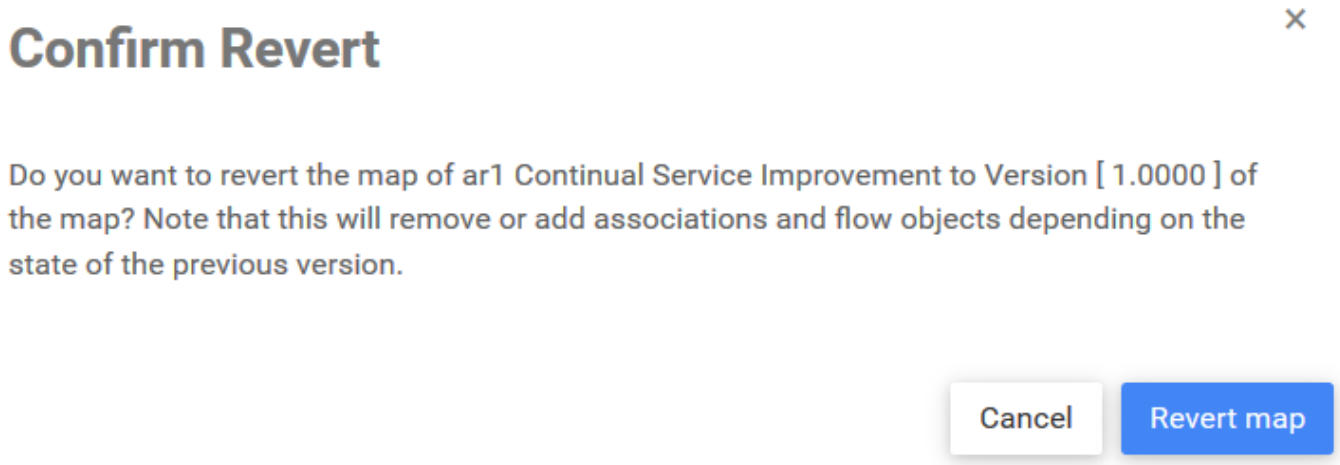
Reverting an Object

To revert an object to its previous version, follow these steps:

1. Once you are on a previous version, you will see a button labeled **Revert**. Click on it to restore your object.



2. A confirmation prompt will appear to confirm the restore. Click on **Revert** to proceed, or **Cancel** to cancel the operation.



3. A new version of the object will be created based on the older version. For example, the current version of an object is 7.000. You are on version 2.000 and revert the object. The result will be a version 7.001 of the object based on the information contained in version 2.000.

12.1.3.12.9 Simulation

When analyzing a process, the integrated process simulator allows users to simulate a realistic scenario of execution of the process, helps identify the bottleneck, and determine true operational cost.

The simulator also allows the user to generate intelligent reports, based on their process details, as well as a variable which they control.

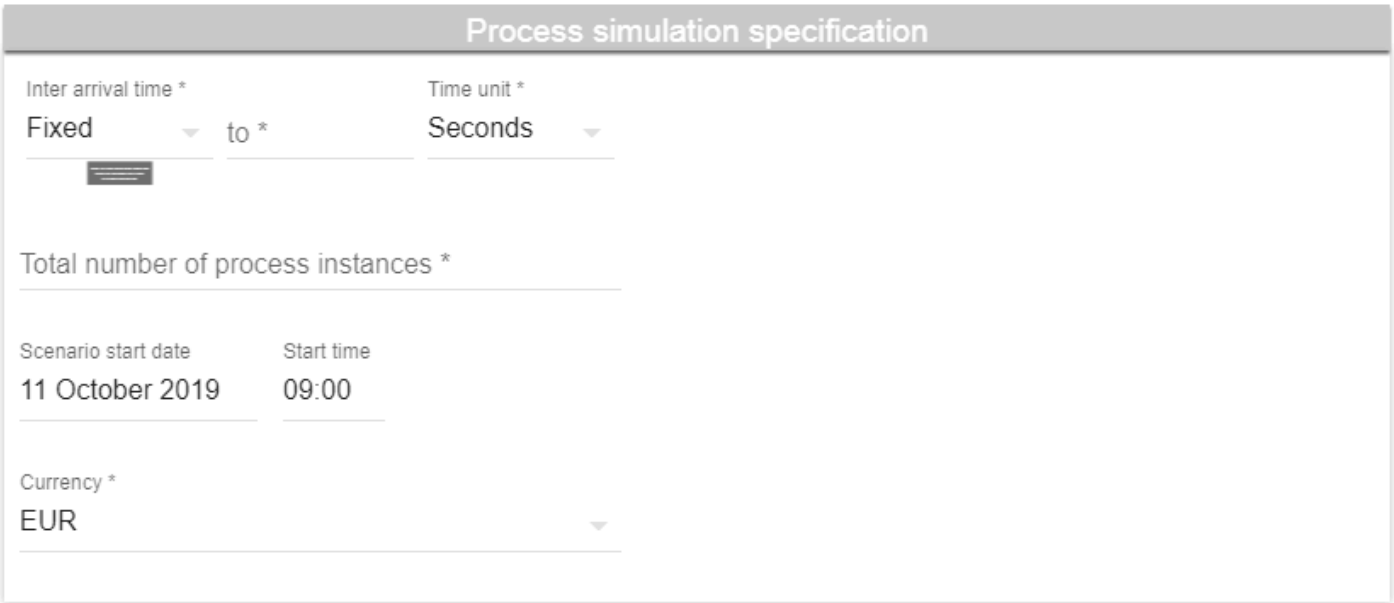
- User can analyze their process quantitatively;
- User can develop insights for improvement or risk;
- User can test the hypothesis by editing the simulation scenario;
- User can re-analyze the results to find an optimum solution.

To generate a simulation you must first be on a process that already has a graph.

1. Navigate to a process. In the details or graph view, click on Tools dropdown menu __ located on the toolbar.
2. Select Simulation
3. The simulation screen will appear and the user will be prompted to create a simulation scenario including the following data:

Process simulation specification

- Internal Arrival Time: At what interval do these processes occur?
- Total number of process instances: how many instances of this business process typically take place?
- Scenario start date and start time: When do these instances start?
- Currency: which currency is used to calculate the cost?



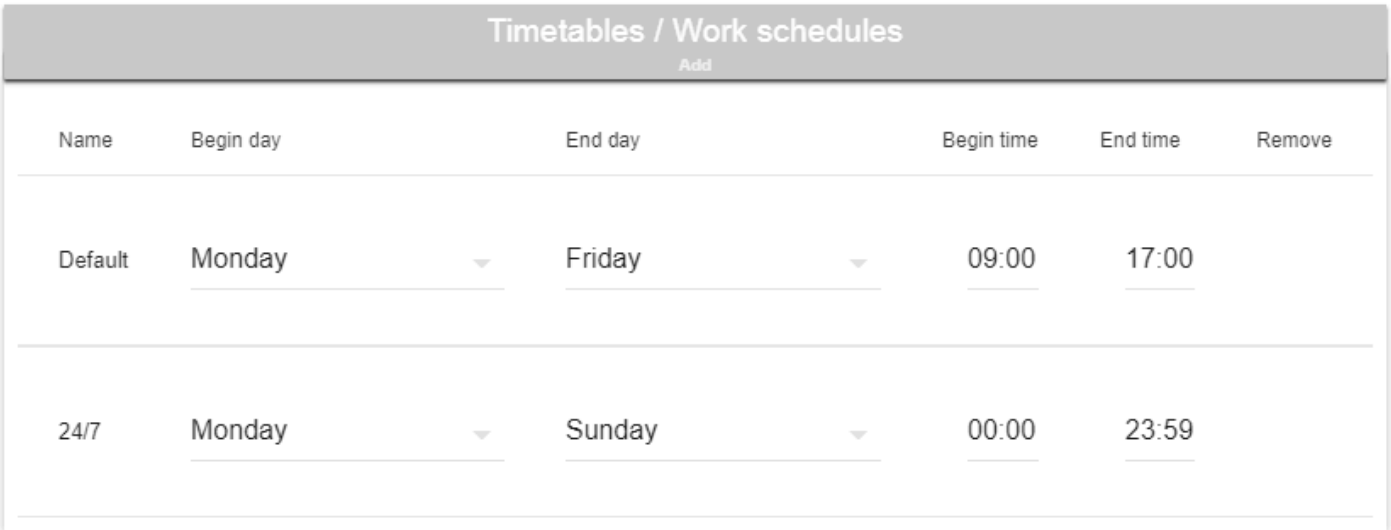
Resources

This feature the roles assigned to the user's flow shape

- Name: identified by role
- Number of resources: how many of these roles are required? N.B: this is a required field
- Cost per hour: hourly cost to resources
- Timetable: applicable timetable

Timetables/Work Schedules

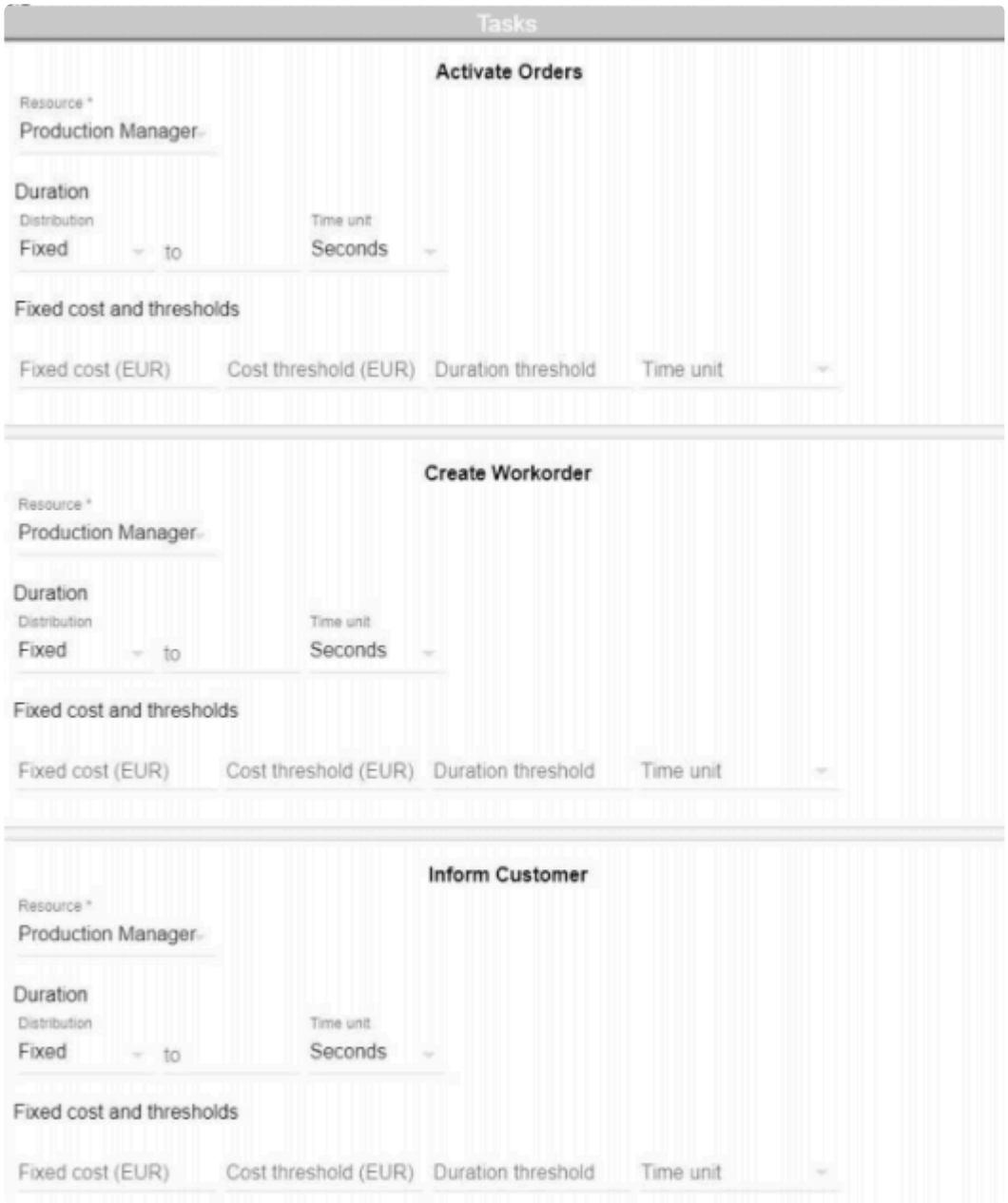
- This defines the work schedule for the roles
- Default timetable used for creation of process instances



Tasks

The tasks are separated and are shows in sequential order. In this example; we are using "Activate Orders", "Create Workorder", and "Inform Customer".This defines the duration, fixed cost, and any cost threshold which may apply to individual tasks

- Resource: identified by role; e.g, Production Manager
- Duration and fixed cost: of each task and event; it supports uniform, normal, exponential, triangular, gamma, log-normal and complex combined distribution for the duration.
- Thresholds: for cost and duration of each task
- Time unit: select seconds, minutes, hours or days from dropdown filed
- Resource: * Note that the resources are dynamically loaded from roles assigned to your activities



Gateways

Use to define the probability of occurrence for the decision in your process

- Branch probabilities for reach a conditional branch in your model, in this example, view the two listed gateways: Issue Invoice and Inform Customer
- Generate an MXML log

- Start Simulation button to simulate the process and analyses result

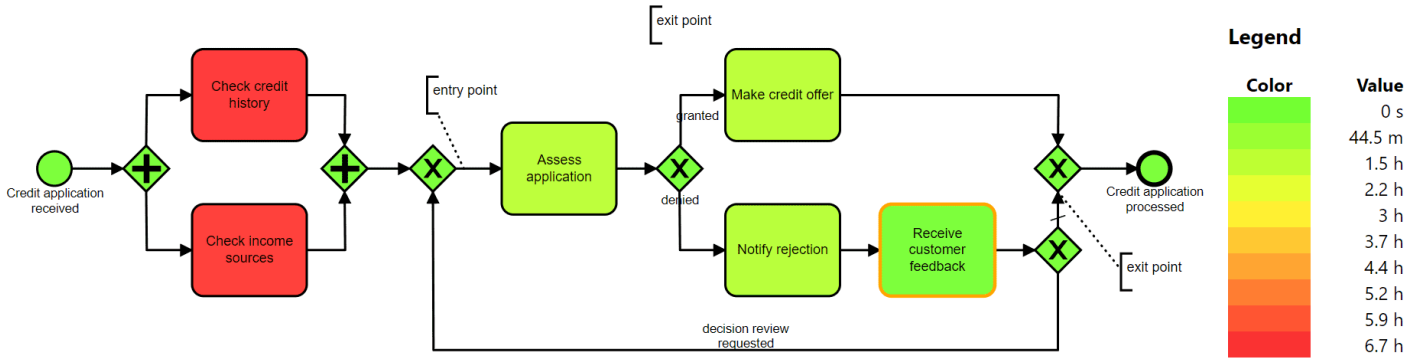
Once the user clicks on the start simulation button, they can review a report which includes the following:

- Resource utilization: see average utilization percentage of each resource in the simulation scenario.
- Cycle times (process duration): the simulator will output the total cycle time of the scenario
- Individual task/element statistics about cost, duration, waiting time and thresholds
- Visual heat-maps of the business process model based on waiting times, counts, costs and duration

12.1.3.12.10 EPC Simulator Features

BPMN Model + Scenario = Results

EPC does lightning fast business process simulations. Normally it does not take more than a few seconds to conduct a simulation containing thousands of process instances. As a result of the simulation you will get the KPIs (key performance indicators) of the business process in the given scenario as well as individual process instance and activity-based statistics. For example, you can create a heat-map to visualize bottlenecks in the process based on the determined waiting times.



Before you can conduct a simulation, you need a business process model in the BPMN 2.0 notation and a simulation scenario. For example, you need to provide the number of process instances to simulate and what is the arrival rate; what resources and how many of them are available; what is the duration of tasks, events, sub-processes and etc.

Learn more about:

Simulation Results
Simulation Parameters

12.1.3.12.10.1 Simulation Results

As a result of the simulation, the EPC Simulator provides insights about how the business process model performed in the given scenario. You will get the key performance indicators (KPIs) of the scenario, resource utilization, individual task, and sub-process KPIs and process event logs. See below for more information.

KPIs of the Scenario

KPIs help you understand bottlenecks in the business process. For example, if there are not enough resources to handle the volume defined in the scenario, then tasks will be enqueued. This means long waiting and cycle times which might not be acceptable for your customers.

KPIs provided by the EPC Simulator help you understand how the business process will perform in the given scenario. This helps you to evaluate whether you have an optimal business process and/or enough resources to meet your business service level agreements (SLA) in various scenarios.

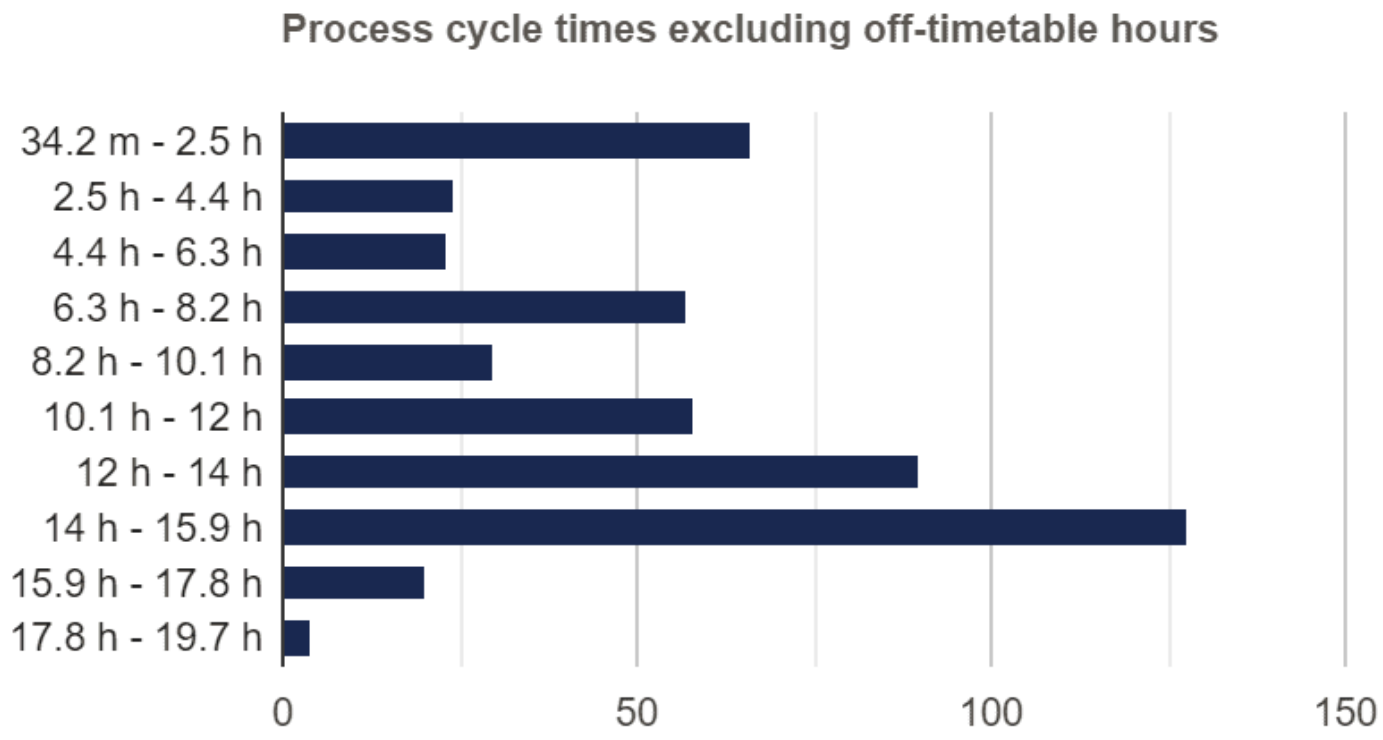
If you have identified bottlenecks in the existing business process, then you can start by doing what-if analysis for experimentation. The easiest, most expensive, but often the only option, would be to increase the number of involved resources. It turns out that it could be possible to optimize the business process instead. The EPC Simulator is the tool to conduct simulations for such what-if experiments.

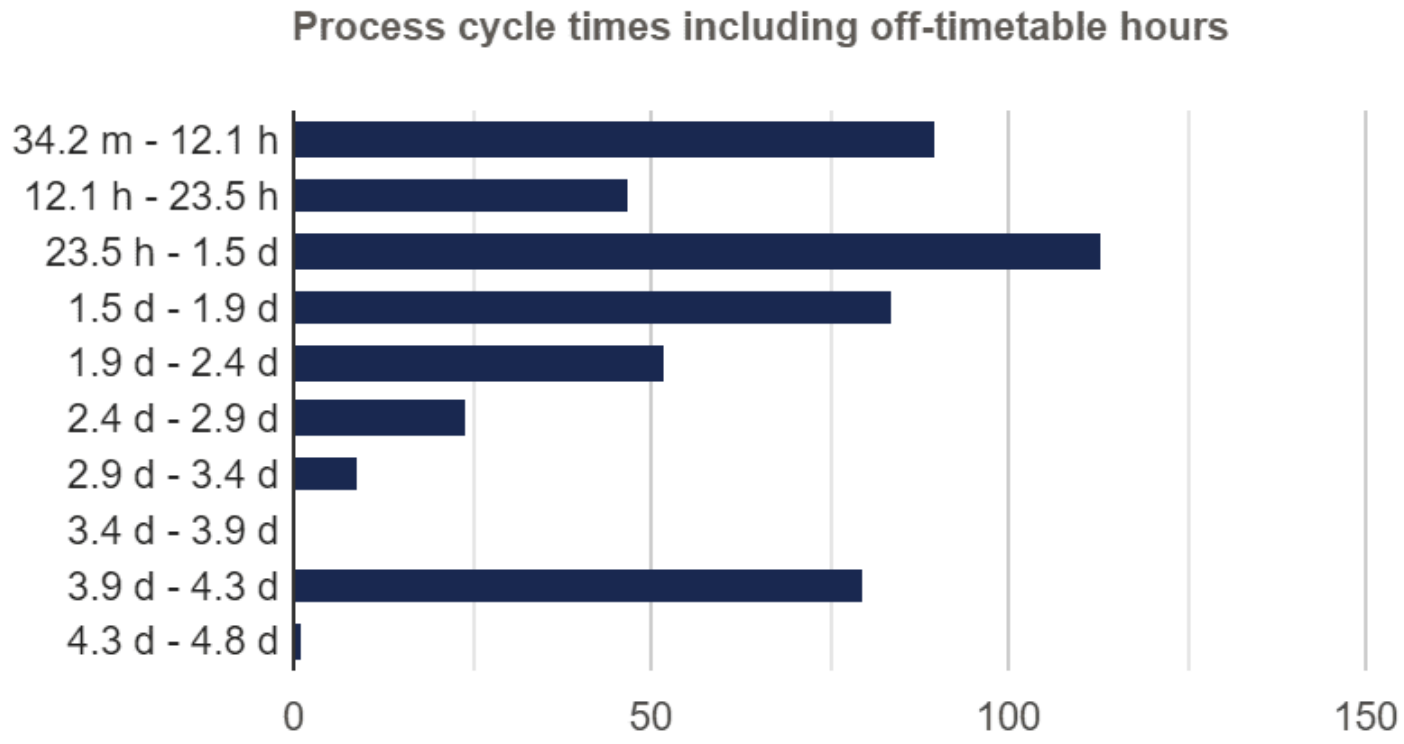
KPIs are often visualized using bar chart diagrams, so does the EPC Online Simulator.

Cycle Time Distribution

Cycle time is the total time from the beginning to the end of your process, as defined by you and your customer. Cycle time includes process time, during which a resource was working, and delay time, during which a unit of work is spent waiting to take the next action.

The EPC Simulator gives you the cycle time of the whole scenario (from the beginning of the first case to the end of the last case) and process instance cycle time distribution. In addition to the standard cycle times, the EPC simulator can provide the “in-timetable cycle time” distribution which includes only the business hours defined by the timetable and excludes the time periods when resources were not working (e.g. weekends) for more precise results.

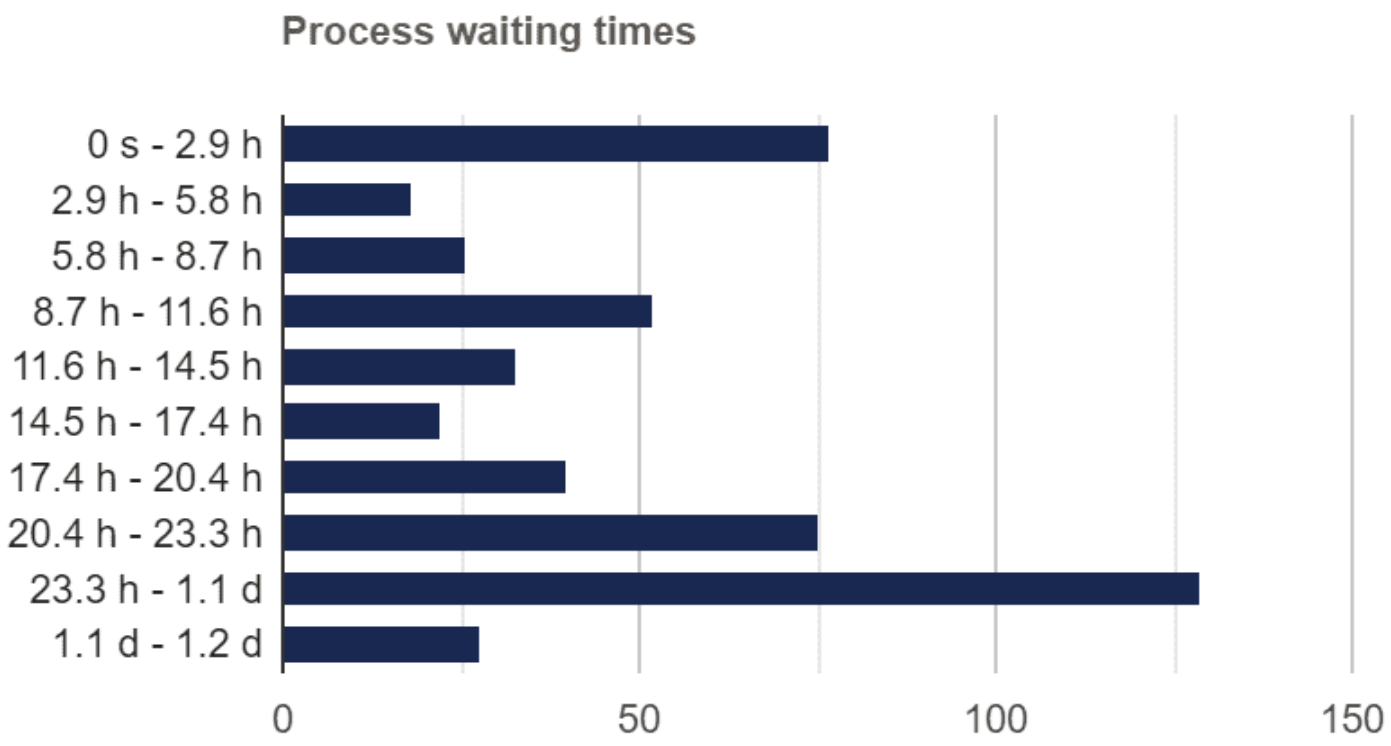




Waiting Time Distribution

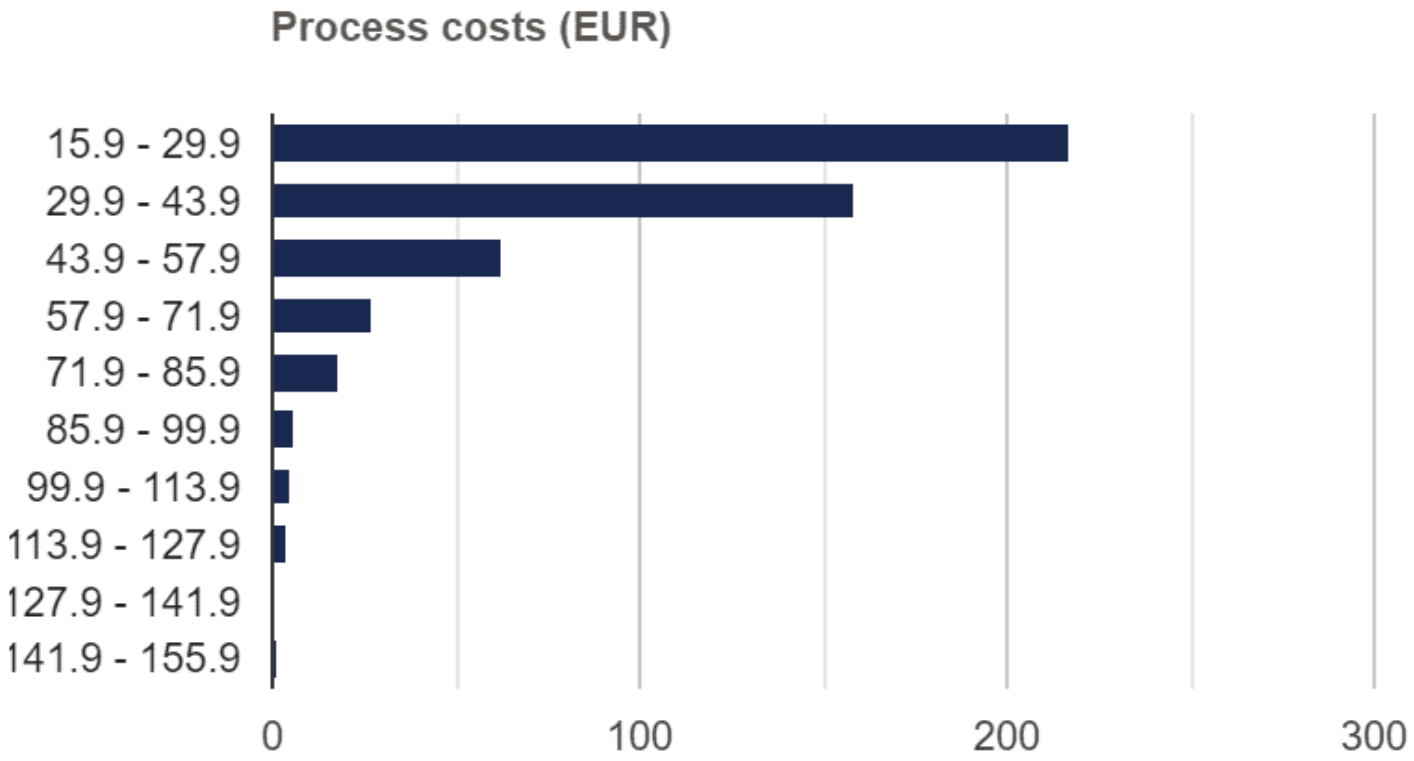
Waiting time is the period of time in which a work item, for example, a task, is waiting for a resource to become available. Waiting time may be caused by a resource required for the process, even though this resource is working at full capacity.

The EPC Simulator gives you the process instance waiting time distribution to understand how much time in each process a customer had to wait. In the EPC Simulator waiting time includes only business hours defined by the timetable.



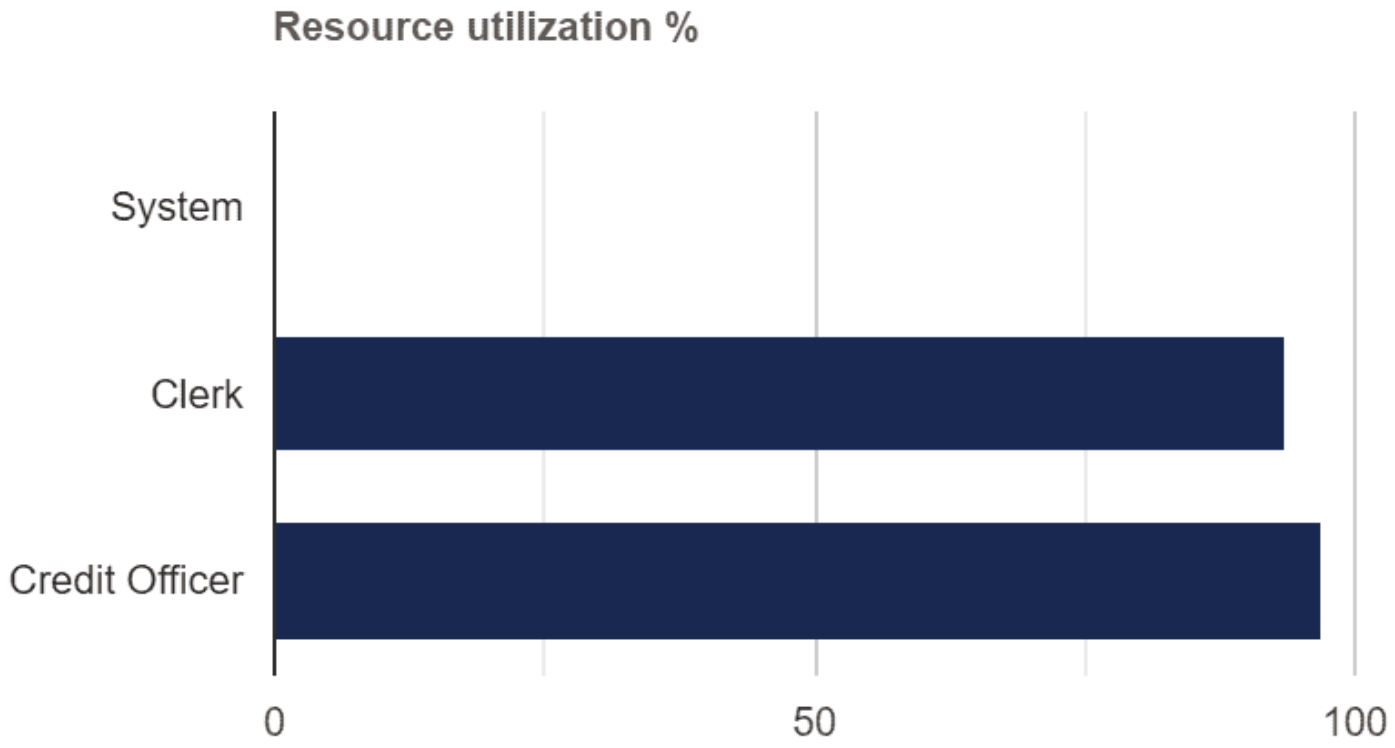
Cost Distribution

When experimenting with large scale simulation scenarios, it is important to understand how changes are impacting the cost for your business. The EPC simulator will provide you the total cost of the scenario plus process instance cost distribution calculated based on the provided scenario.



Resource Utilization

Resource utilization is one of the most important KPIs which tells you how efficient is the use of resources. It is a percentage from 1% to 100% per resource, indicating how much time of the cycle time the resource was busy. If the resource utilization goes over 80%, then most likely waiting times start to have an impact on the cycle times and from the resource perspective, such utilization is not sustainable.



Excluded Warm-up and Cool-down Periods

The EPC Simulator excludes all the statistics from the process instances that fall into “warm-up” or “cool-down” periods if defined by the scenario to eliminate the noise. See Simulation Scenario for more information.

BPMN Element Task Statistics

Statistics are also calculated for each individual element, task, sub-process in the provided BPMN model. You will be able to get the count and minimum, maximum and average element cost, cycle time, and waiting time. If you have provided the cost or duration threshold for an element in the scenario, then the deviation minimum, maximum, and average are calculated.

MXML Logs

Simulation logs can be saved in the MXML format which includes all events with timestamps. MXML logs can be imported in the ProM toolset for in-depth analysis.

CSV Report

Simulation reports can be saved in the CSV format.

12.1.3.12.10.2 Simulation Parameters

In general, in order to conduct a simulation, you need a business process model in the BPMN 2.0 notation and a simulation scenario information.

In addition to the BPMN model, you need to provide the number of process instances to simulate and how frequently to start them (arrival rate), what resources and how many of them are available, what is the duration of tasks and etc.

If the business process is already implemented, then you can get all the data by mining the existing process logs. You may come up with hypothetical scenarios for stress testing. See sections below to understand what data is required to define the simulation scenario.

Business Process Model

Business Process Model and Notation (BPMN 2.0) is a standard for business process modeling that provides a graphical notation for specifying business processes and serialize them in the XML format.

The business process model must be given in the BPMN 2.0 format to conduct a simulation using the EPC Simulator. You can provide multiple BPMN files to encapsulate sub-processes in separate files and reference them in other BPMN files. In such case you must choose the main BPMN file that serves the entry point to the business process.

In the BPMN model, you must have at least one start event which is used to start a new process instance. If you have more than one start event in the model, then all of them will be started.

Simulation Scenario

Process Instances

The total number of process instances needs to be set to define how many BPMN process instances will be started in the simulation scenario. There is no technical limit here, the EPC Simulator is scalable! In trial and academic versions, limitations are applied.

Arrival Rate

Arrival rate is defined as a distribution of time how frequently new process instances are started. For example, an exponential arrival rate with 30 minutes mean would start a new process instance in every 30 minutes on average. The exponential distribution is very realistic – in some cases, the interval between two new process instances could be 5 minutes and in some cases a few hours.

Start Date and Time

A virtual start date and time can be specified to define when the first process instance should be started – that affects the event timestamps in the simulation logs.

Warm-up and Cool-down Periods

At the beginning of the simulation scenario, all resources are available and activities are handled without any delays. At the end of the simulation scenario, the situation is similar – as new process instances are not created, more resources become available to work on activities immediately. Such periods are called “warm-up” and “cool-down” accordingly. The EPC Simulator can exclude all the statistics from the process instances that fall into “warm-up” or “cool-down” periods if defined by the scenario to eliminate the noise.

Optionally you can provide a fixed number or a percentage of total process instances that will be excluded from calculating performance statistics at the start and at the end of the simulation scenario. This feature allows you to focus on the results from the period when resources are most utilized and cause bottlenecks.

Resource Pool

Resource pool defines all available actors in the business process who can be assigned to tasks to perform the work. You can define as many resources as needed.

The following properties are required to define a resource:

- Name (to be linked with tasks, and used in reporting)
- Number of available resource instances
- Cost per hour (optional)
- Timetable to specify the work schedule/timetable when the resource is available

Timetables / Business Hours

Timetable defines when a resource is available or when the business operates and new process instances are started. By default there are two timetables:

- Default – used for process instantiation. New process instances will be generated only according to the Default timetable
- 24/7 – always available, used for automatic/scripted activities in the scenario

You can define as many timetables as you need and associate them with different resources. Each timetable has rules which include start day, end day, begin time, and end time properties. That allows you to create simple timetables for Monday to Friday, 9 am to 5 pm business hours; or only Monday from 9 am to 12 am and from 4 pm to 6 pm timetable for certain resources.

Parameters for BPMN Elements

Tasks

For any type of task in the BPMN model the following parameters can be provided:

- Resource as the actor for the task
- Duration distribution to specify how much time does the task take on average
- Fixed cost associated with starting the task
- Cost and duration thresholds to see how many tasks are not within the given thresholds

For sub-process and call activity elements that contain other BPMN elements, users can choose to simulate them as basic tasks and provide all task parameters instead of starting the actual sub-process if needed.

Gateways

All exclusive (XOR) and inclusive (OR) gateway elements in the BPMN model require execution probabilities for their outgoing sequence flows. The EPC Simulator uses a random number generator to determine to paths to be executed.

For XOR gateway, the sum of the probabilities for the execution of each outgoing flow must be 100%.

For OR gateway, the probability of execution of each outgoing flow can be from 0% to 100% (default) and the EPC Simulator will start at least one outgoing sequence flow.

Intermediate and Boundary Events

Intermediate catch events and boundary events attached to activities in the BPMN model can be given a duration distribution to specify how much time the event will take or when it will be triggered.

It is common to use intermediate message or timer events to simulate delays in the business process that are caused by external actors and do not utilize any of the resources from the resource pool.

Duration Distributions

All durations and time intervals in the EPC Simulator are defined by a distribution. We support the following distributions:

- normal
- exponential
- uniform
- triangular
- log-normal
- gamma

- histogram for a custom curve
- fixed (constant)

Time unit of the duration is always in seconds, but user interfaces like EPC can offer other time units like minutes or hours and convert the value to seconds.

12.1.3.13 Object Book Generation

Your EPC now features object book generation, allowing you to leverage your EPC to dynamically create object specific reports and documents. After your editors have created and uploaded document templates you can now uses these templates for the following modules:

1) Process Module – Allowing you to create process-based documents, process books and standard operating procedures
2) Organization Module – Allowing you to create Organization, Role, Asset or Resources reports
3) Performance Module – Allowing you to create Objectives and Performance Measurement/Tracking reports
4) Document Module – Allowing you to create document summaries, logs and reports
5) Risk Module – Allowing you to generate risk management reports
6) Control Module – Allowing you to create control logs and documents
7) Rule Module – Allowing you to create rule and policy books
8) Master Data Module – Allowing you to create Master Data, Entity and Attribute Reports
9) Capability Module – Allowing you to create Analysis and Capability Management Reports

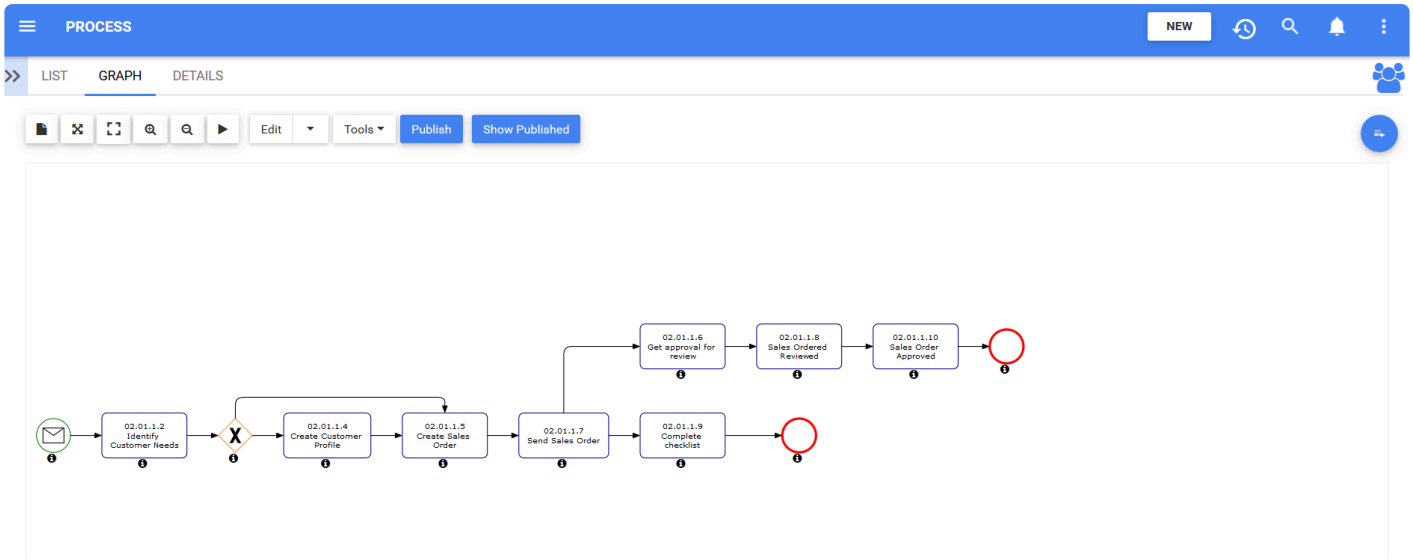
These reports can be generated at:
a) The object level – allowing you to create reports about a specific object
b) The folder, process or org unit level – allowing you to create reports about objects INCLUDING their child objects
c) The Set level – allowing you to create large, summary documents including their child objects

Object Book Generation

https://www.youtube.com/embed/E7wwpvugixs?rel=0

To Generate an Object Book

1) Navigate to the Graph or Details Page of the Object



2) Click on the Document Generation icon

3) Preview the template you are looking for by clicking on the preview icon

4) Select the appropriate template using the checkbox on the left

5) Select the any additional parameters

Setting	Description
Include all children	Will allow you to include any Sub-objects (child objects) within your report. This feature is especially useful when generating documents at folder/set level
Object Selector	Will allow you to select which specific objects will be included. Note this only applies to the Organization, Master Data and Performance Modules
Map Orientation	Will allow you to select the map orientation, which can be left-to-right, right-to-left or top-to-bottom (auto layout). Note this only applies to the Process Books
Map Layout	Will allow you to select if you want your map laid out as you current map setting or your saved map layout. Note this only applies to the Process Books
Map Page Break Options	Will allow you to select if you want to use canvas grid page breaks, automatically cut map based on book template size & orientation or shrink the map to fit in single page. Note this only applies to the Process Books

6) Select the ‘Done’ button and the document will begin to generate

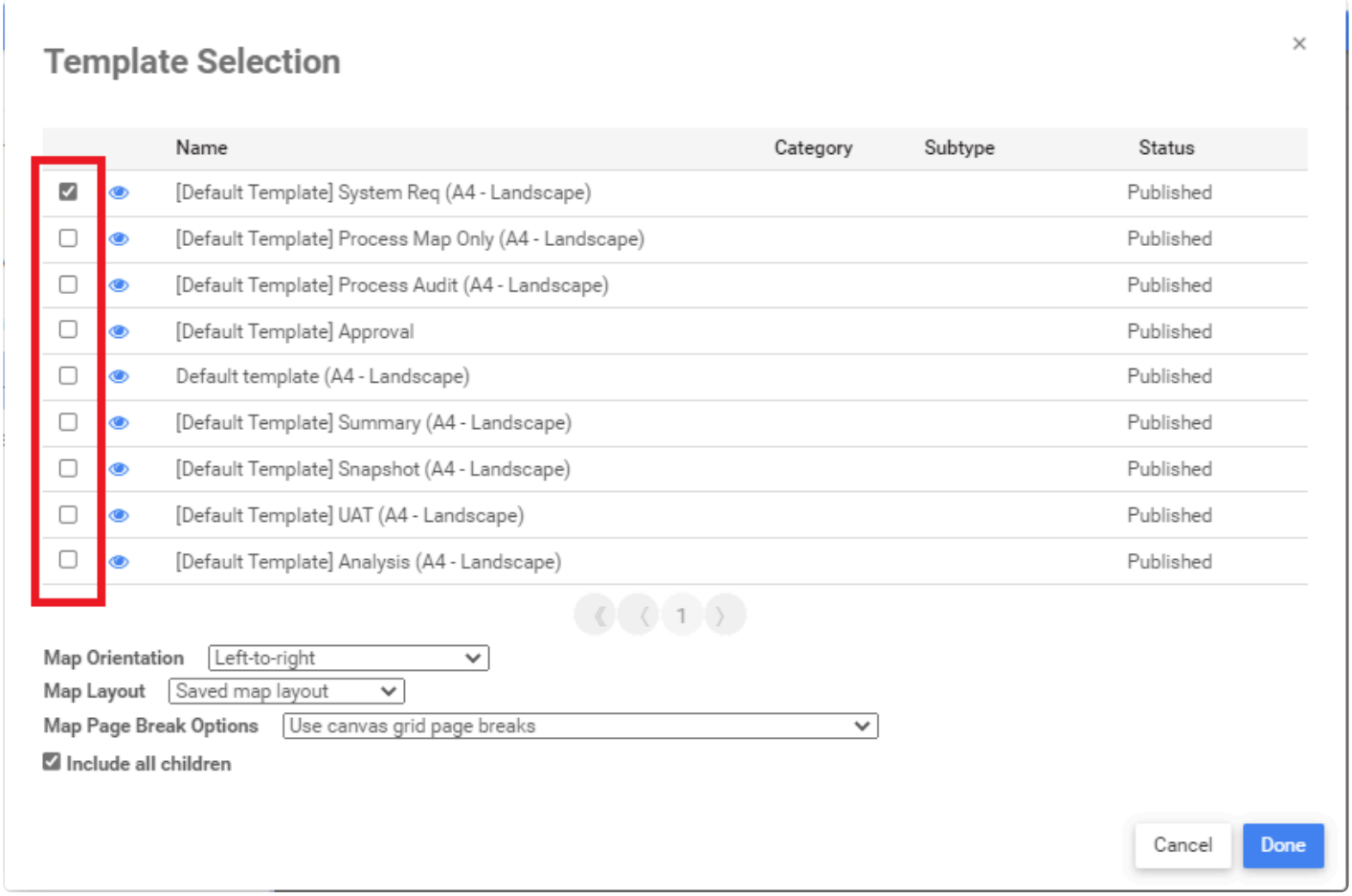
Note that the document may take a few minutes to generate.

12.1.3.13.1 Differentiation Between Generate Book vs Generate from Template

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

Generate Book

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

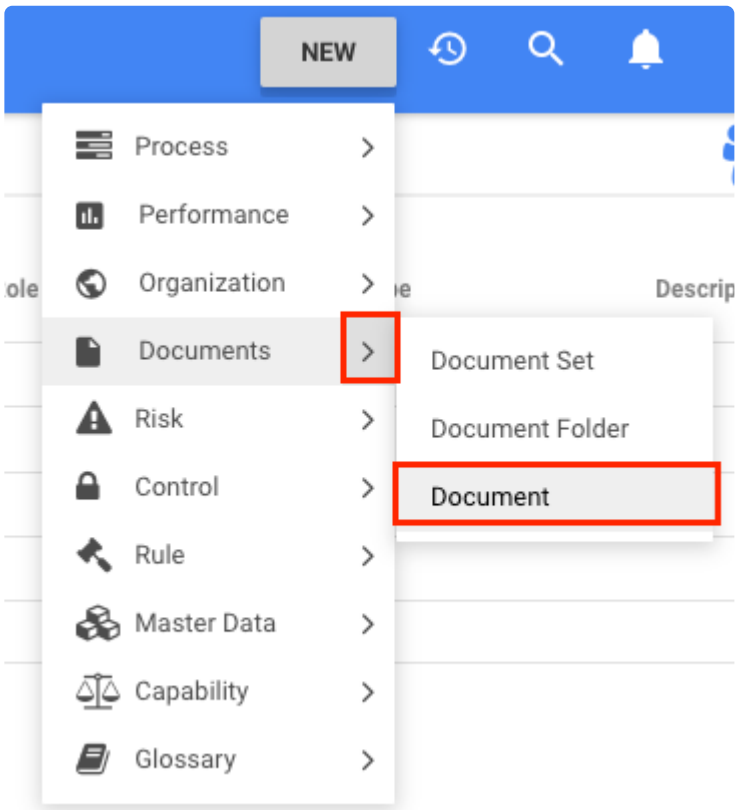


For more information on how to Generate a book, click here

Generate From Template

To use the Generate from Template feature, please follow the next steps:

1. Click on the New button at the top right of the screen, and click on document.



2. The **Add New Document** form will open.

3. Select the type of document as **Generate from template** and choose the template to be used for the document.

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

New Document

Editing Language ENGLIS

GENERAL PROPERTIES CUSTOM SECTIONS

Add & Close

What is this Document?

Name * What is the name?

Parent * Invoicing Documents Select a Parent

Unique Identifier What is the unique identifier?

Description

Source

Normal Font Size

body p

Type URL File Link Document Upload Wiki **Generated from Template** Template

Select SOP Process

Select a Template *

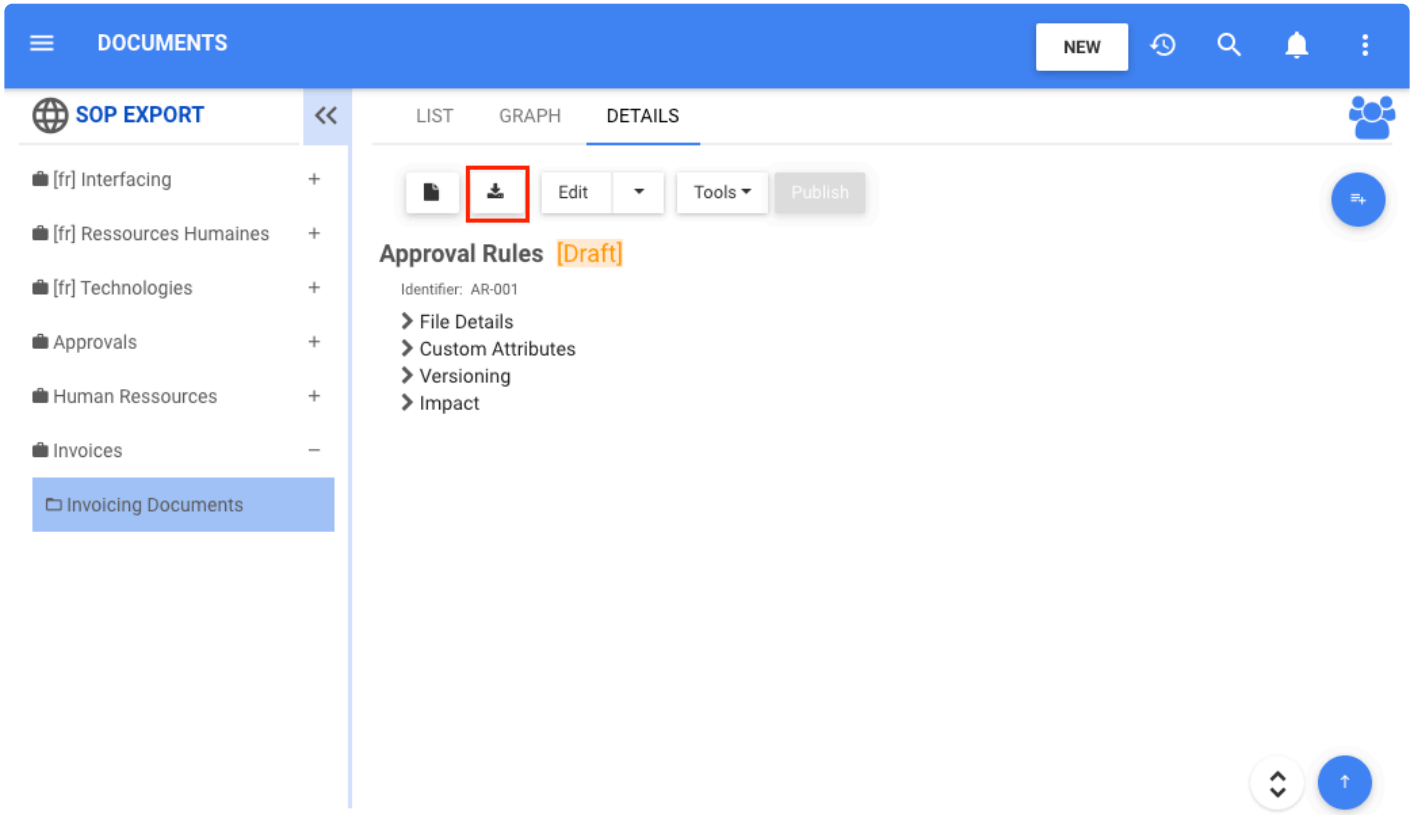
		Name	Category	Subtype	Status
☑	👁	[Default Template] Approval Control			Published
☐	👁	[Default Template] Approval Organization			Published
☐	👁	[Default Template] Approval Capability			Published
☐	👁	[Default Template] System Req (A4 - Landscape)			Published
☐	👁	[Default Template] Approval Rule			Published
☐	👁	[Default Template] Process Map Only (A4 - Landscape)			Published
☐	👁	[Default Template] Approval Performance			Published
☐	👁	[Default Template] Approval Organization			Published
☐	👁	[Default Template] Approval Master Data			Published
☐	👁	[Default Template] Process Audit (A4 - Landscape)			Published

1 2

Selected Template: [Default Template] Approval Control

4. Once the document has been created, then users can navigate to the Document module, to the DETAILS page of a document object.

5. There users can find icon , when clicking on it, users will download the document with the chosen template on creation of the document if selected.



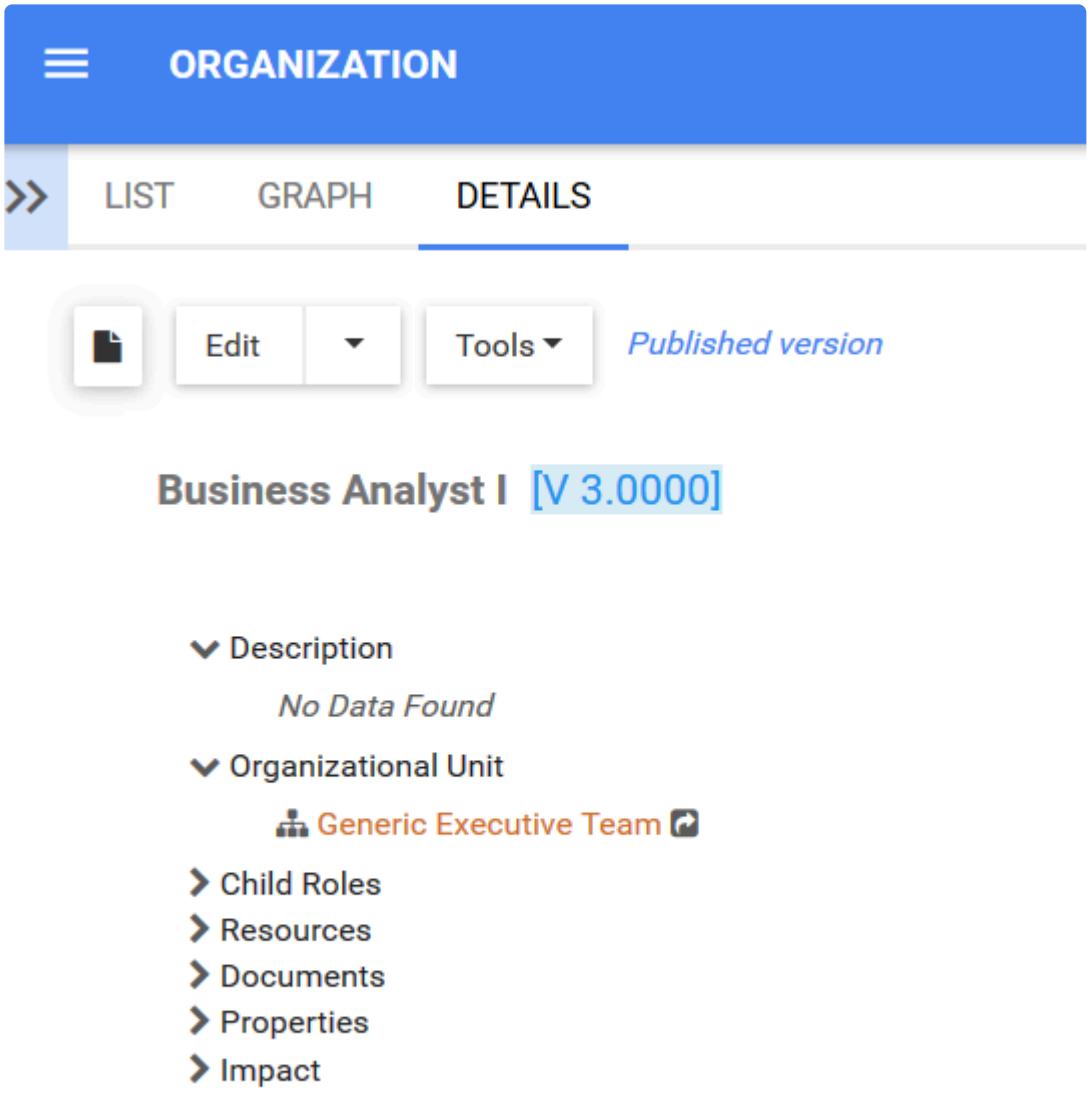
12.1.3.14 Copy (and Paste) Existing Objects

The EPC now allows web editors to copy (and paste) existing objects, allowing you to rapidly build content in your application. Copying an existing object will allow you to create an exact copy of the object, maintaining all associations and critical details attached to your initial object.

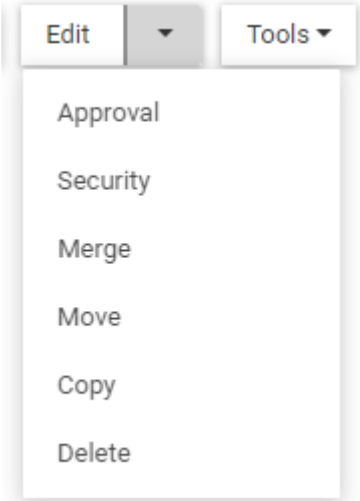
This feature is available in:
1) Process Module
2) Documents Module
3) Organization Module
4) Risk Module
5) Control Module
6) Rules Module
7) Performance Module
8) Master Data Module

> Note that when you create a copy, the name ‘Copy of …’ will be added to the name of the object you are copying.
> Note that approval cycles and security configurations will not be copied.

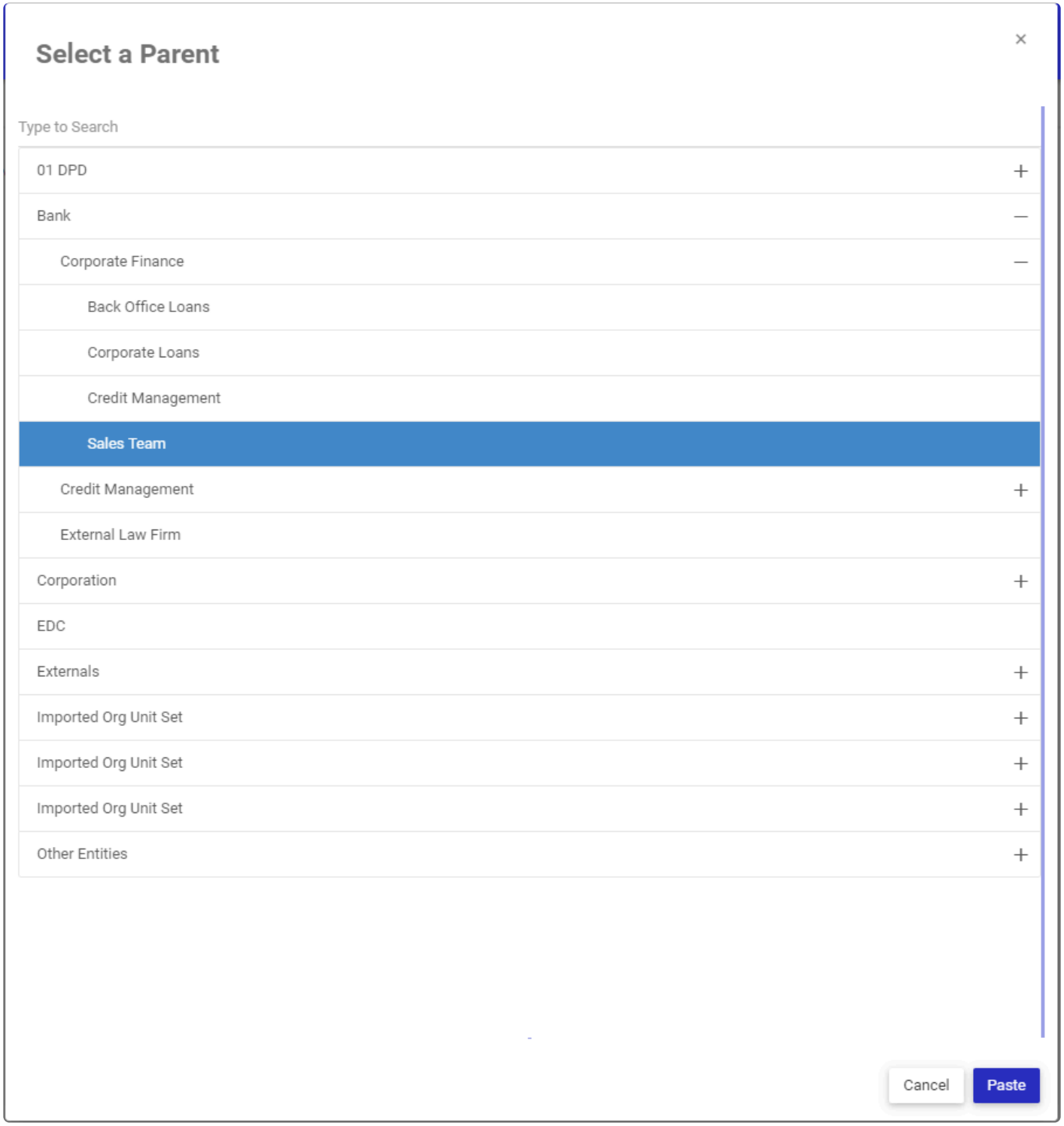
To Copy and paste an object, please see the instructions below:
1) Navigate to the Graph or Details page of the object you wish to copy



2) Select ‘Copy’ from the ‘Edit Dropdown’

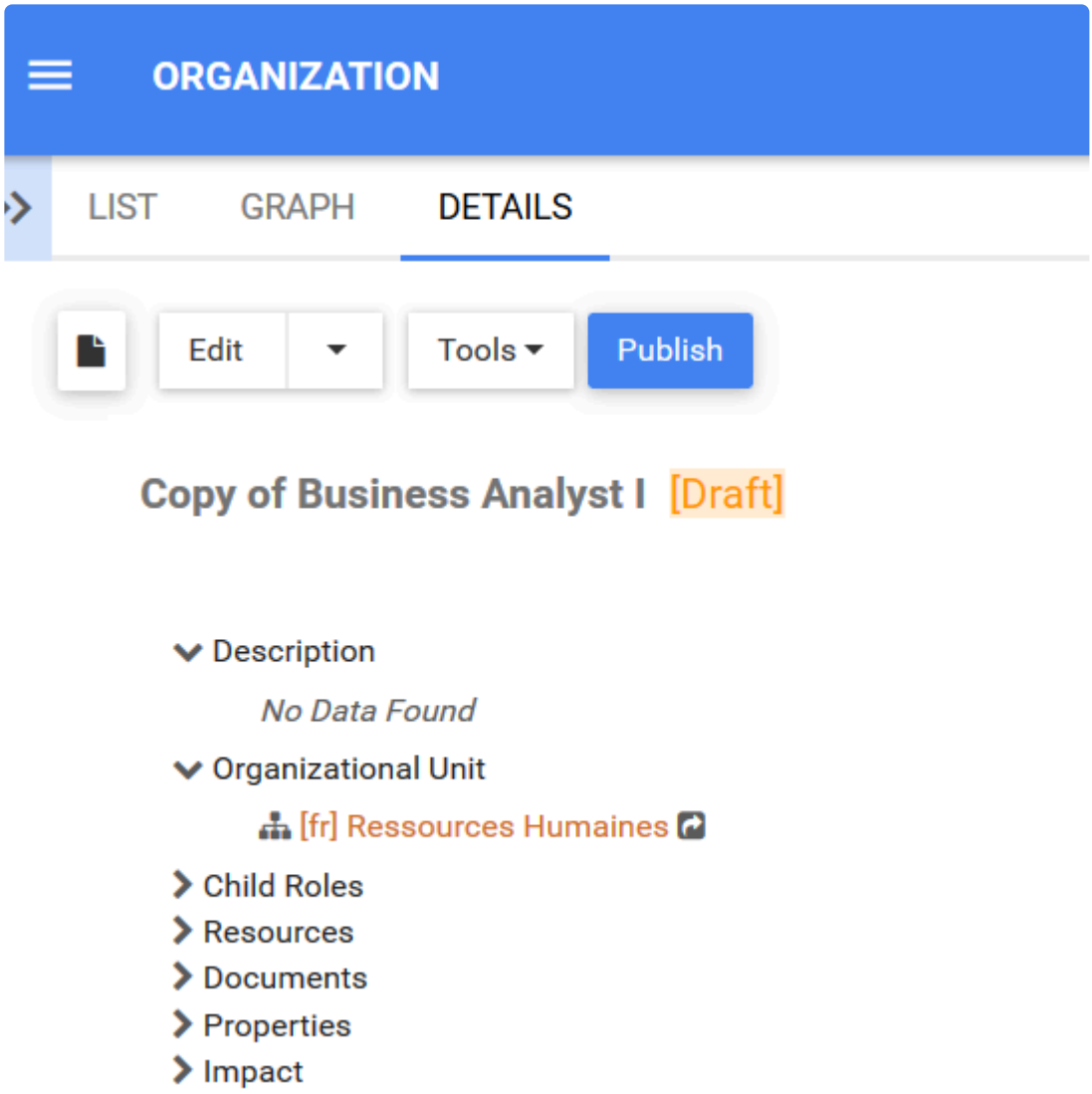


3) Select a destination to paste the copy



4) Select 'Paste'

5) Review the Copy



Note that you will not be able to copy and paste an object in the same location

Lock

For all modules, creating a copy of an object that is being edited is not prevented. The user won't receive a lock error message.
The copy will be created with the latest saved content.

For the Process Module, creating a copy under a locked process is prevented. The user will receive a lock error message. An example of a message is given is the Edit Lock page.
For all other modules, creating a copy under a locked object is not prevented. The user won't receive a lock error message.

12.1.3.15 Endorsement

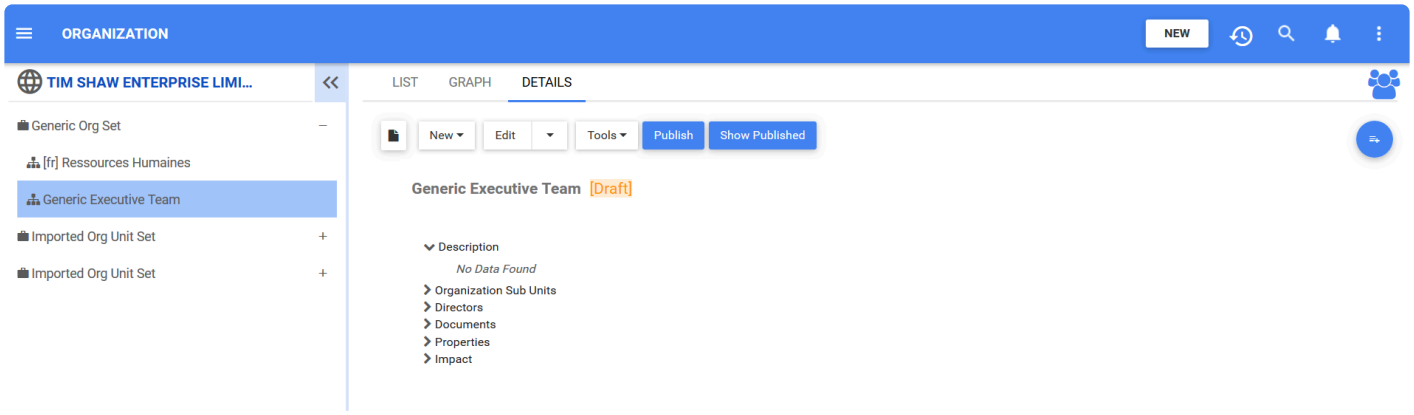
Endorsement cycles often involve multiple individuals before changes can be implemented. This is often the case as business activities that are subject to change may affect multiple different roles and resources, requiring their consent prior to change. These endorsement cycles can vary dependent on the organization, and the importance of the request being made.

Web Modelers can set an endorsement cycle for **all EPC objects.** The Endorsement button is available on the toolbar under the object's Details tab.

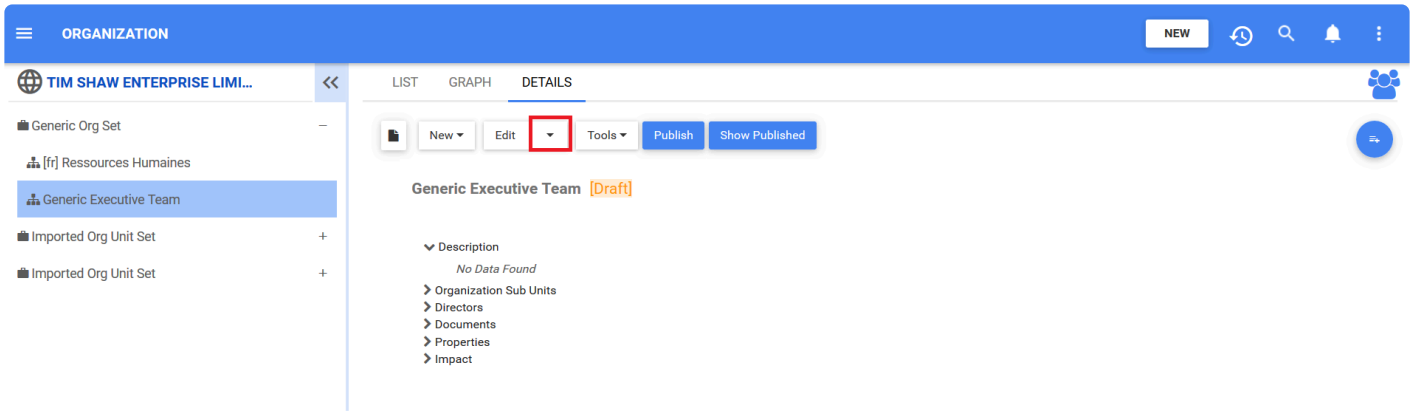
Web Modelers need to ensure they have the permission to be a Web Modeler, their displayed content is set to Show Latest, and their editing tool is the Web.

Follow the instructions to set an Endorsement Cycle

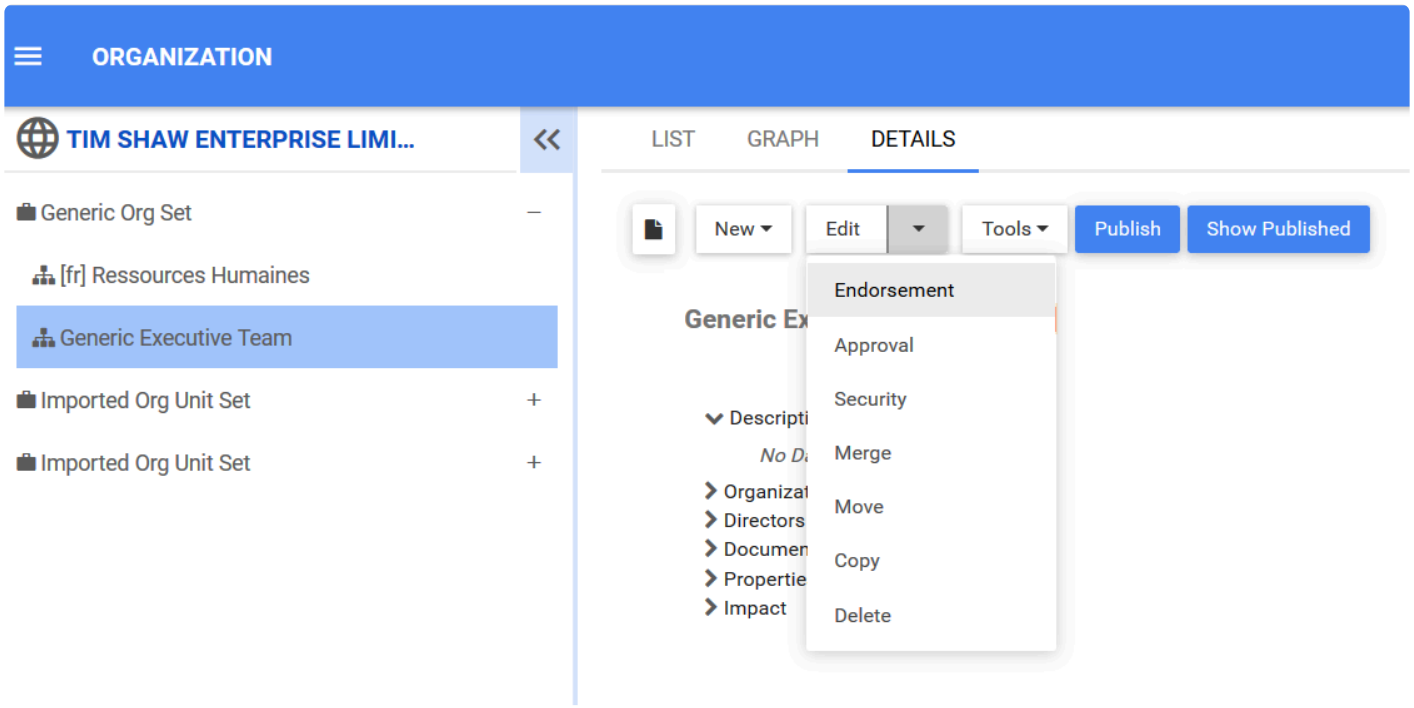
1. Navigate to the details section of the object. In this example, an Organization Unit



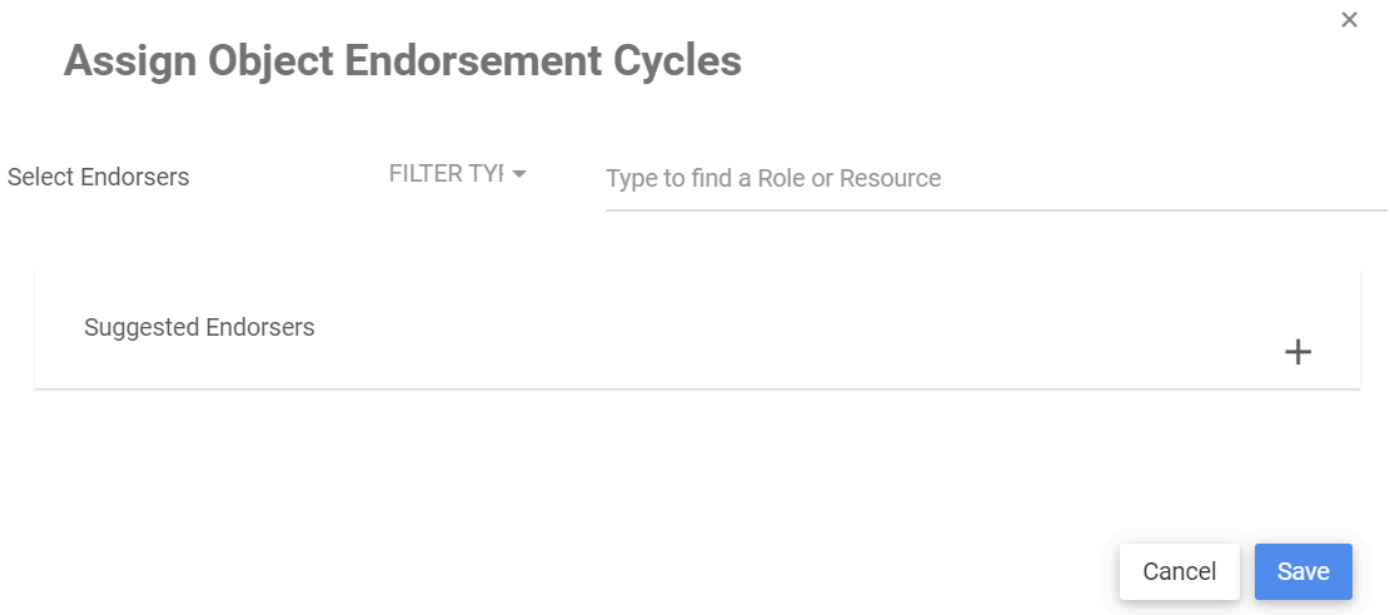
2. Navigate to the box



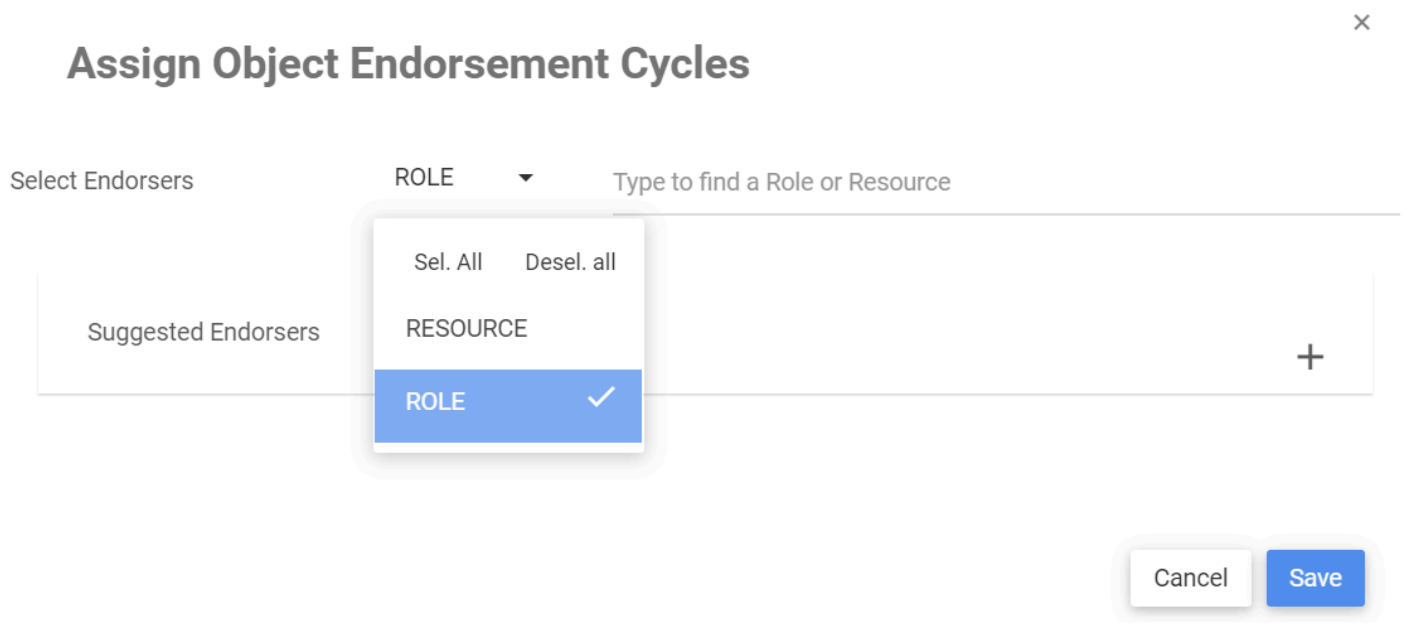
3. A drop-down menu will be generated. Choose the "Endorsement " box



4. You will be redirected to the Assign Object Endorsement Cycles window

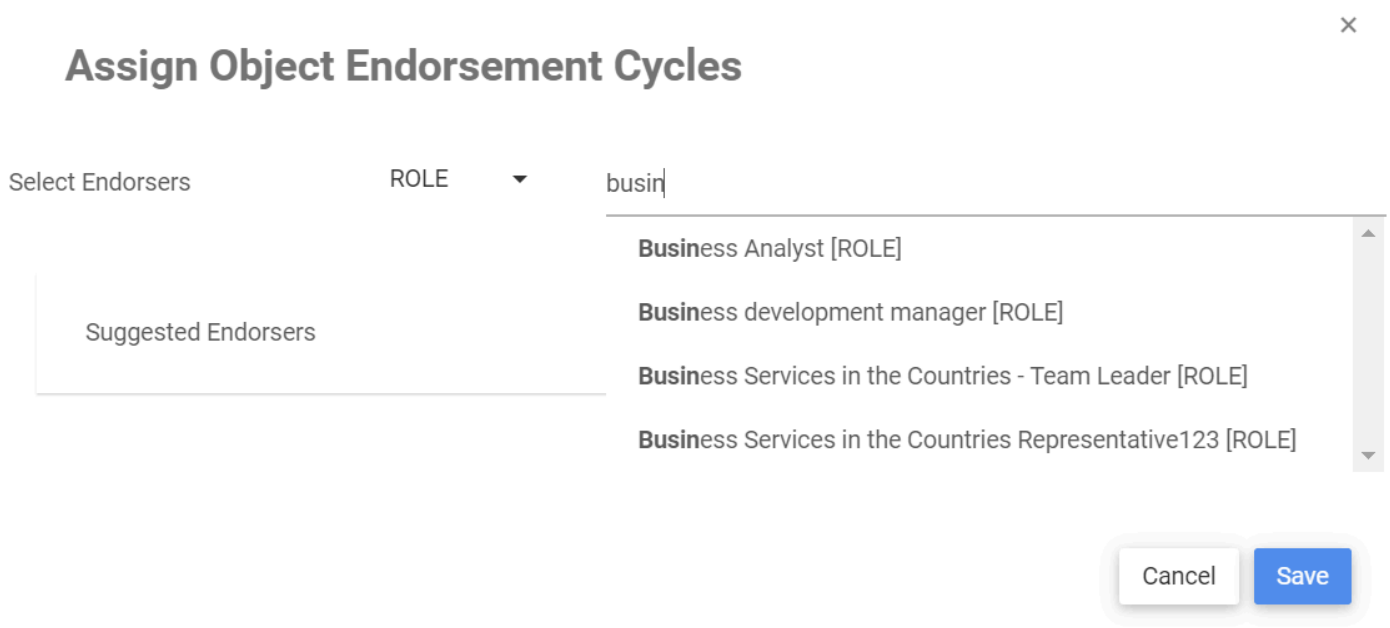


5. Navigate to “Select Endorsers” and select a filter

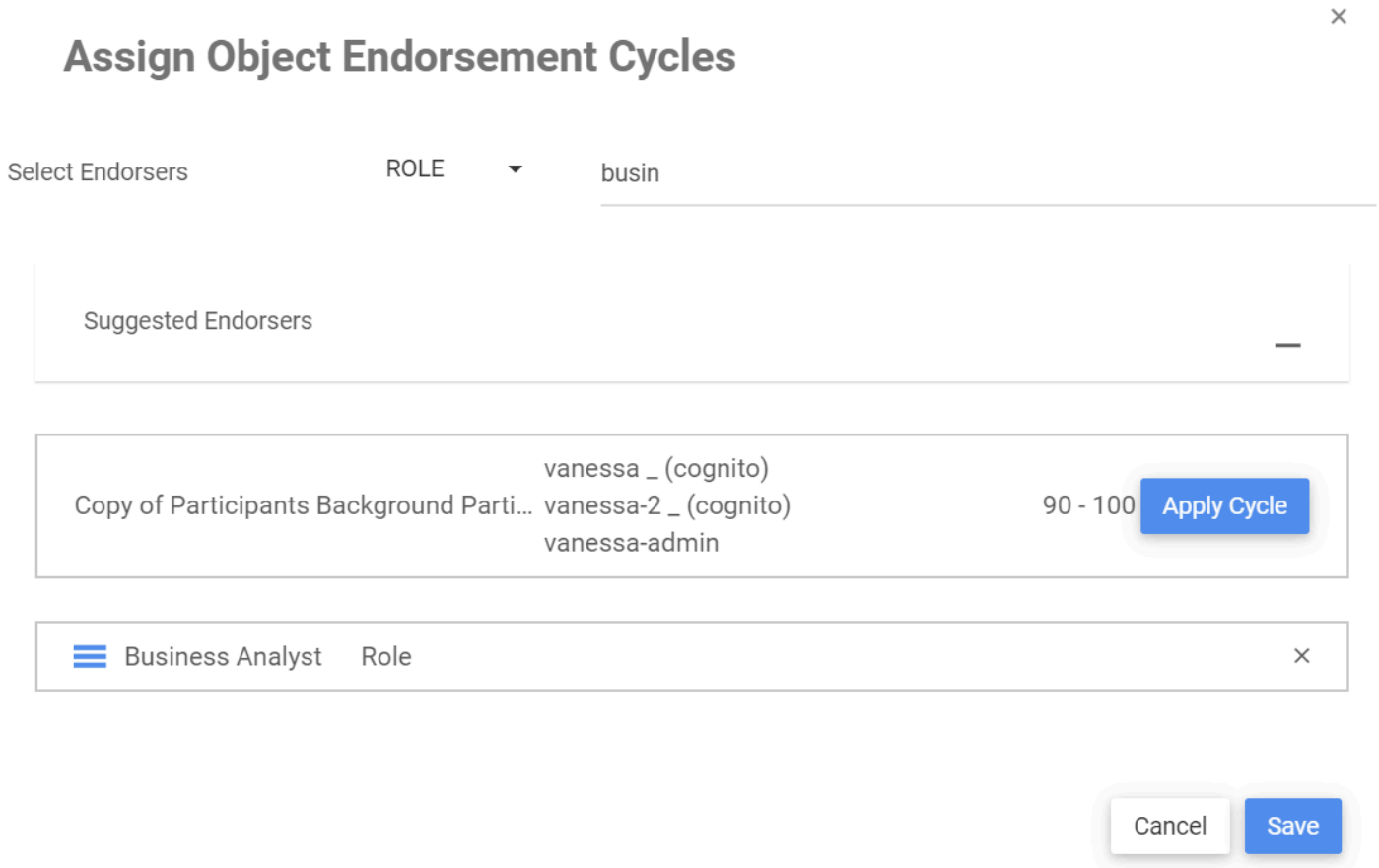


6. Type the name of the Role you want to assign as the endorser. From the search suggestions, click to select the Role you want to assign

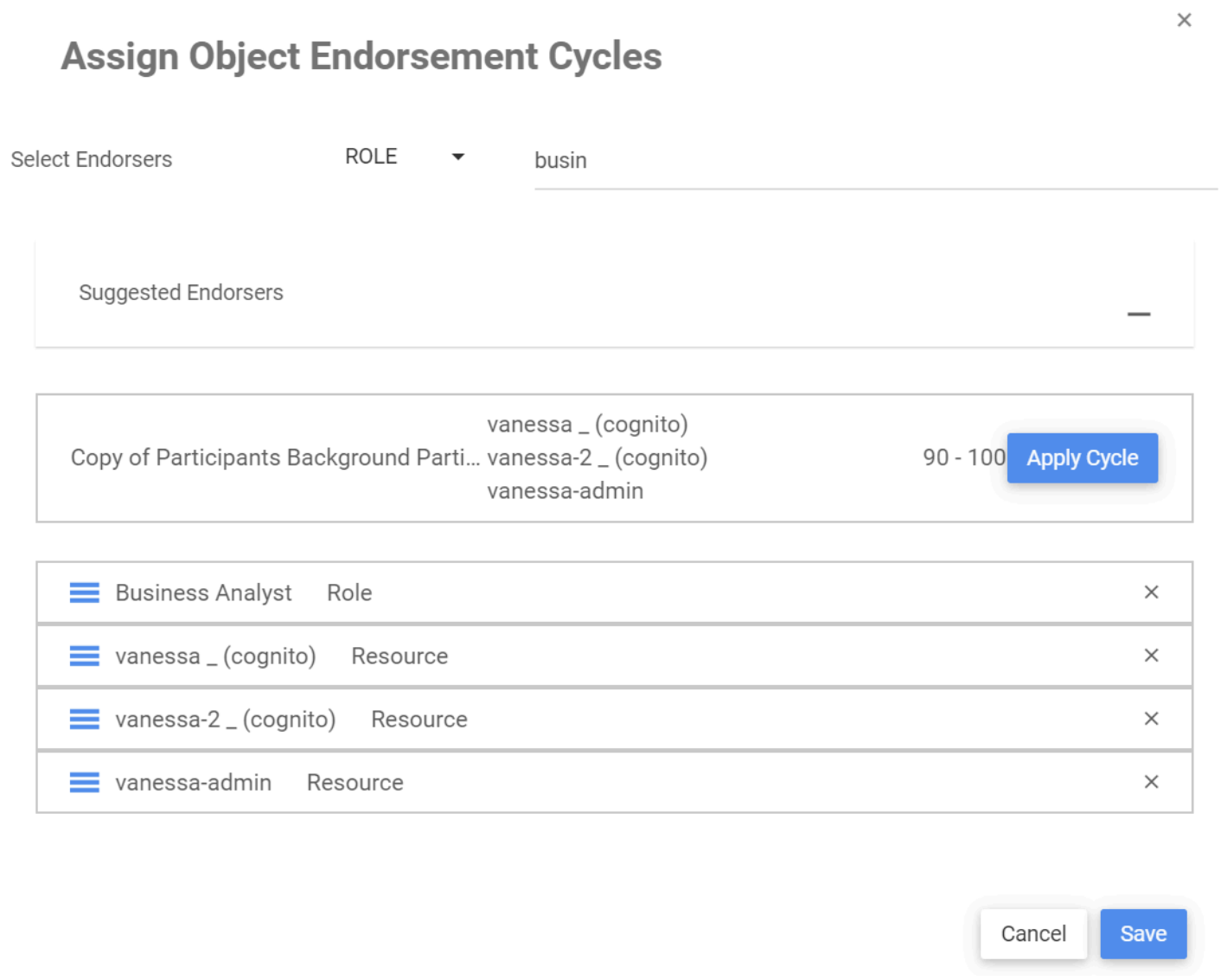
> The list of Roles will populate based on key word typing



7. Expand the Suggested Endorsers section to view suggested endorsers from a similar object



8. Select “Apply Cycle” to the desired suggestion and the endorsers will appear in a table



To remove endorsers from an Approval Cycle, click on the “x”

9. Save the Endorsement Cycle

Once the object has been successfully been approved by endorsers in the cycle, the Web Modeler will be able to publish the object.

To learn more about Endorsement Cycles, click here

Modify Endorsement Configuration

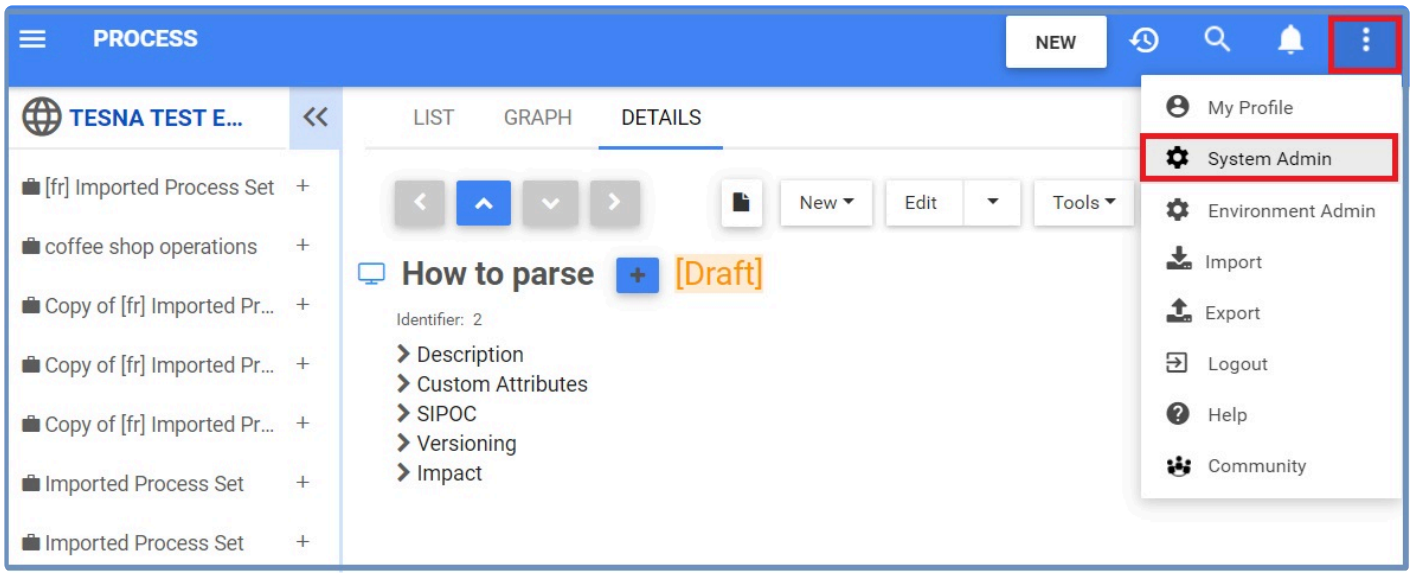
Users can now modify the configuration of the approval cycle while an approval cycle is in progress. The changes done will apply to the ongoing approval cycle. Users can

- Delete an Endorser
- Add a new Endorser

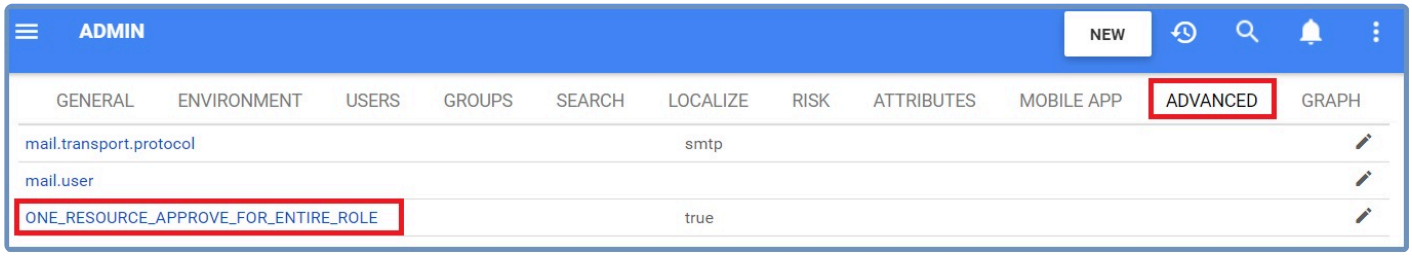
12.1.3.16 One resource of a Role Endorses / Approves

The Admin administrator can set one resource of a role to approve or endorse an object.

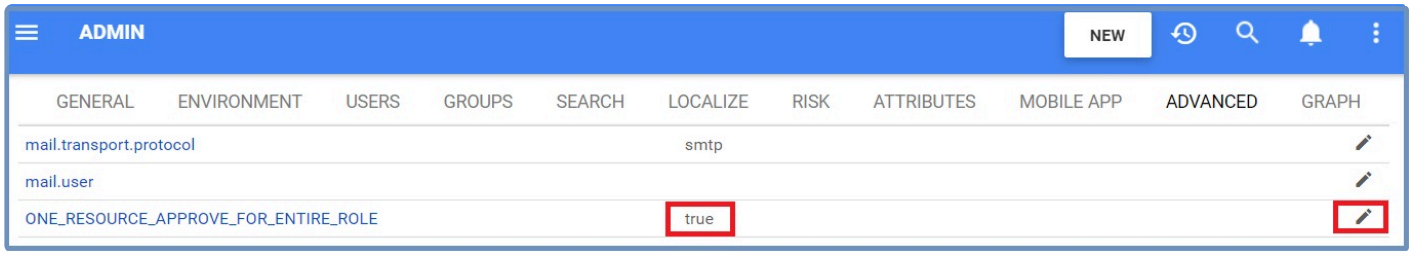
1. Select the **Three-dot** icon on the top right part of the page and select **System admin** from the dropdown menu.



2. Click on **Advanced** and go to the **ONE RESOURCE APPROVE FOR ENTIRE ROLE**.



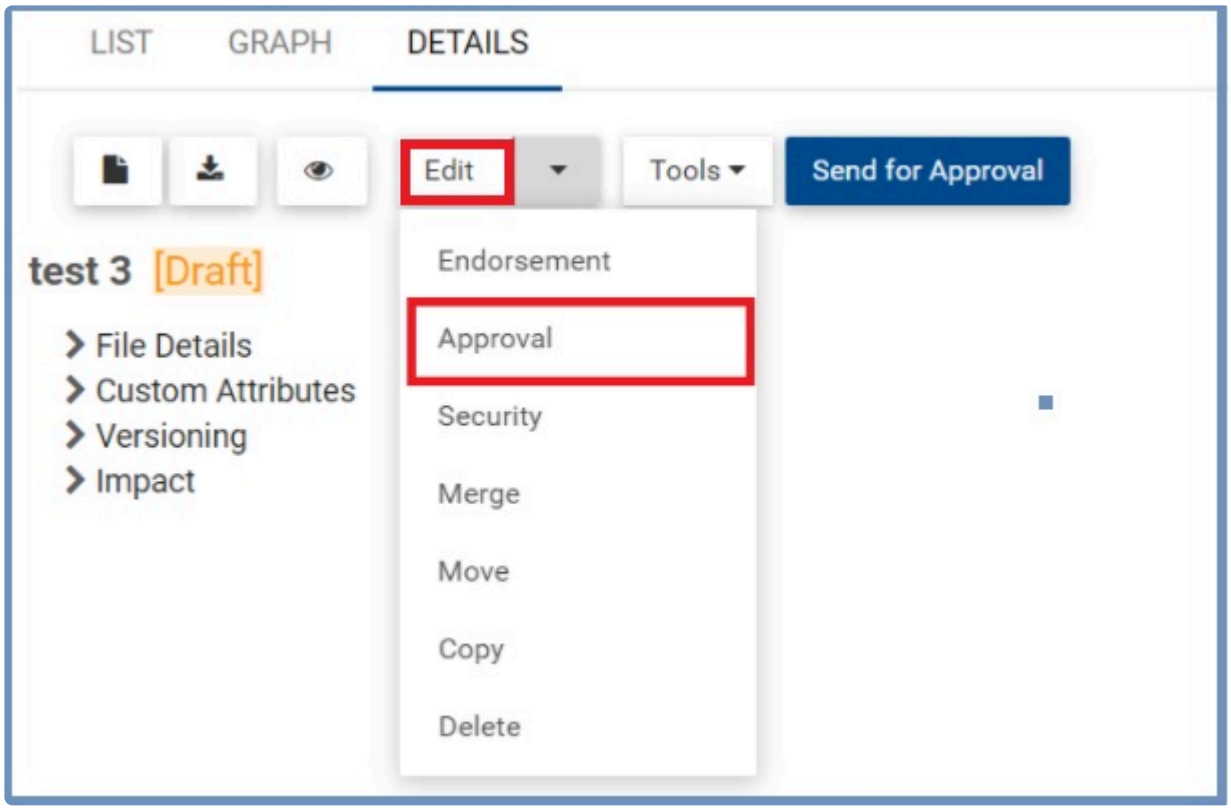
3. Click on the edit button/Pencil and change to true.



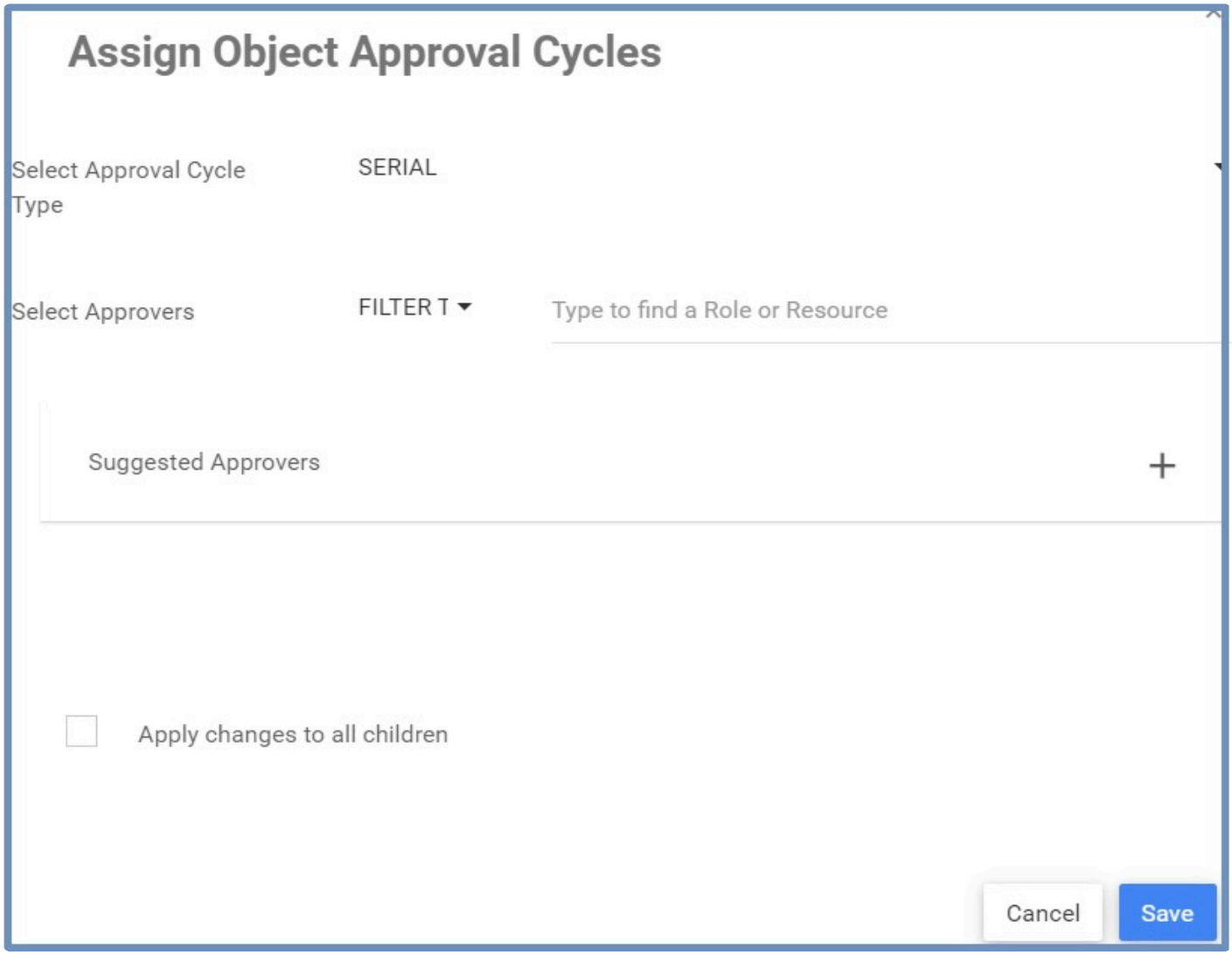
Once the feature has been activated. users can send the object for approval.

4. Navigate to the details section of the object.

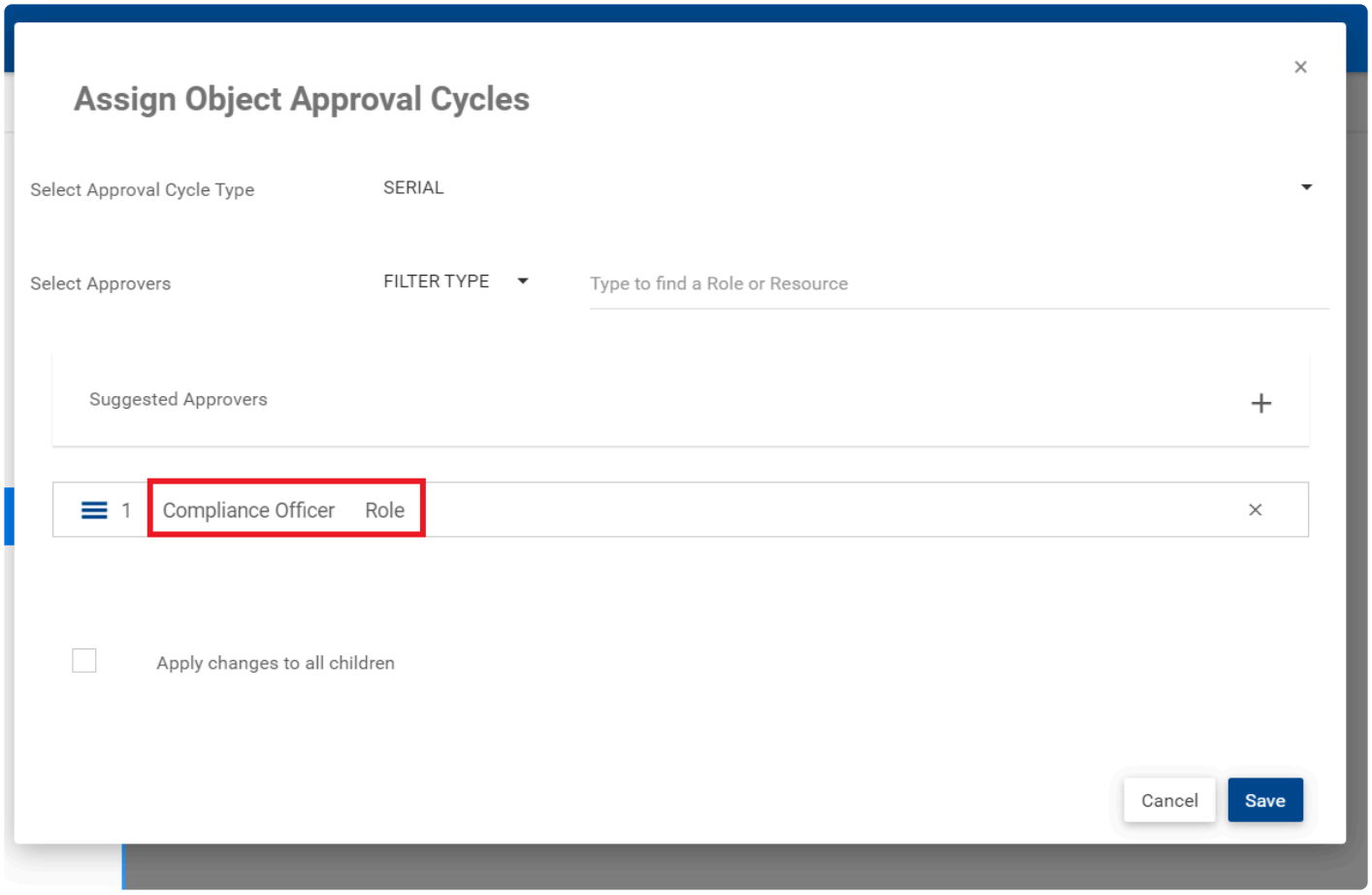
5. Click on the **Edit** button and select **Approval** from the dropdown menu.



6. You will be redirected to the **Assign Object Approval Cycles** window.

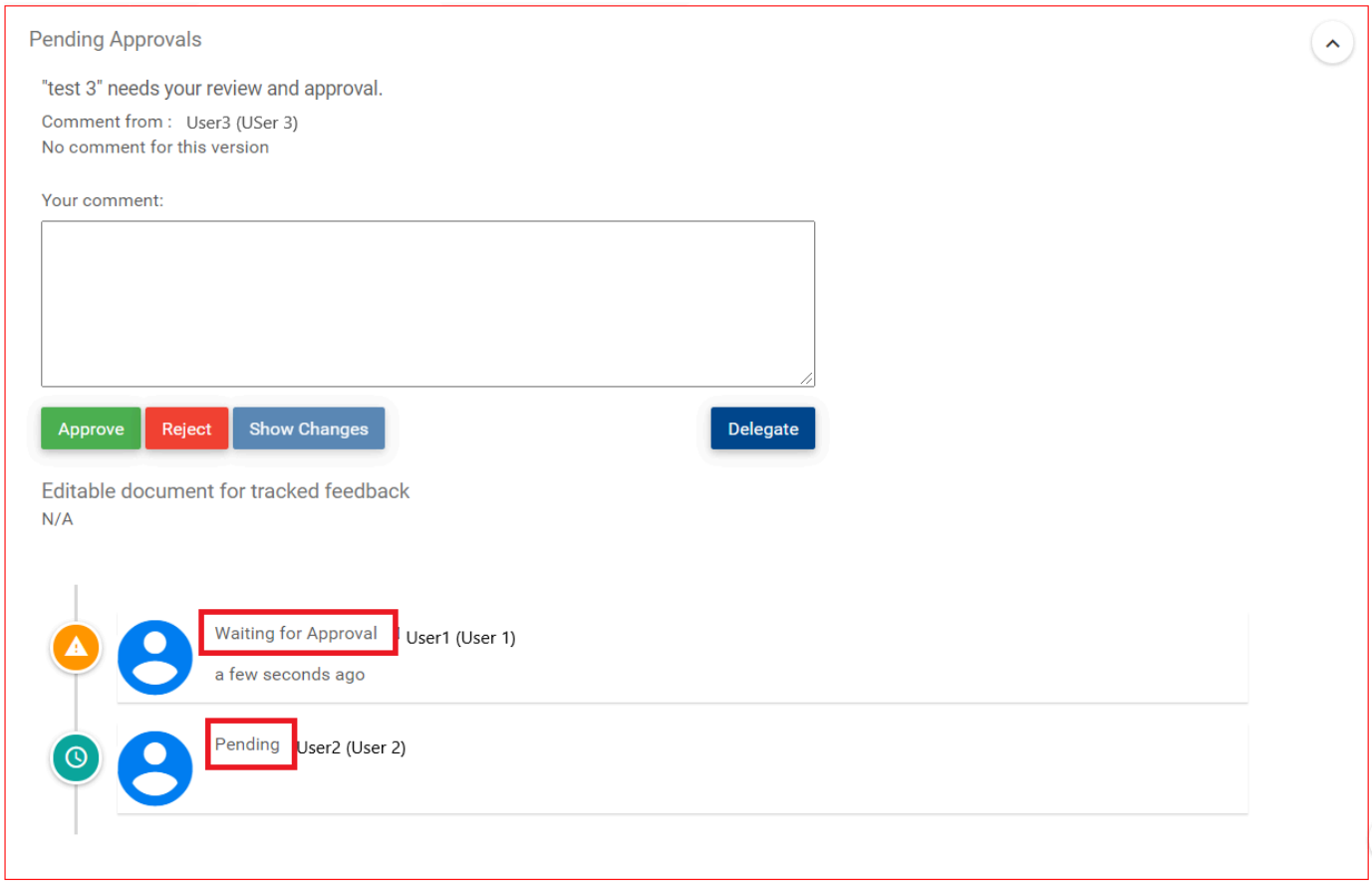


7. When you select approval Cycle type is SERIAL and the approver is Role, then the first resource of that role receives the approval request. Once that resource approves, the rest of the resources are automatically not needed for approval.

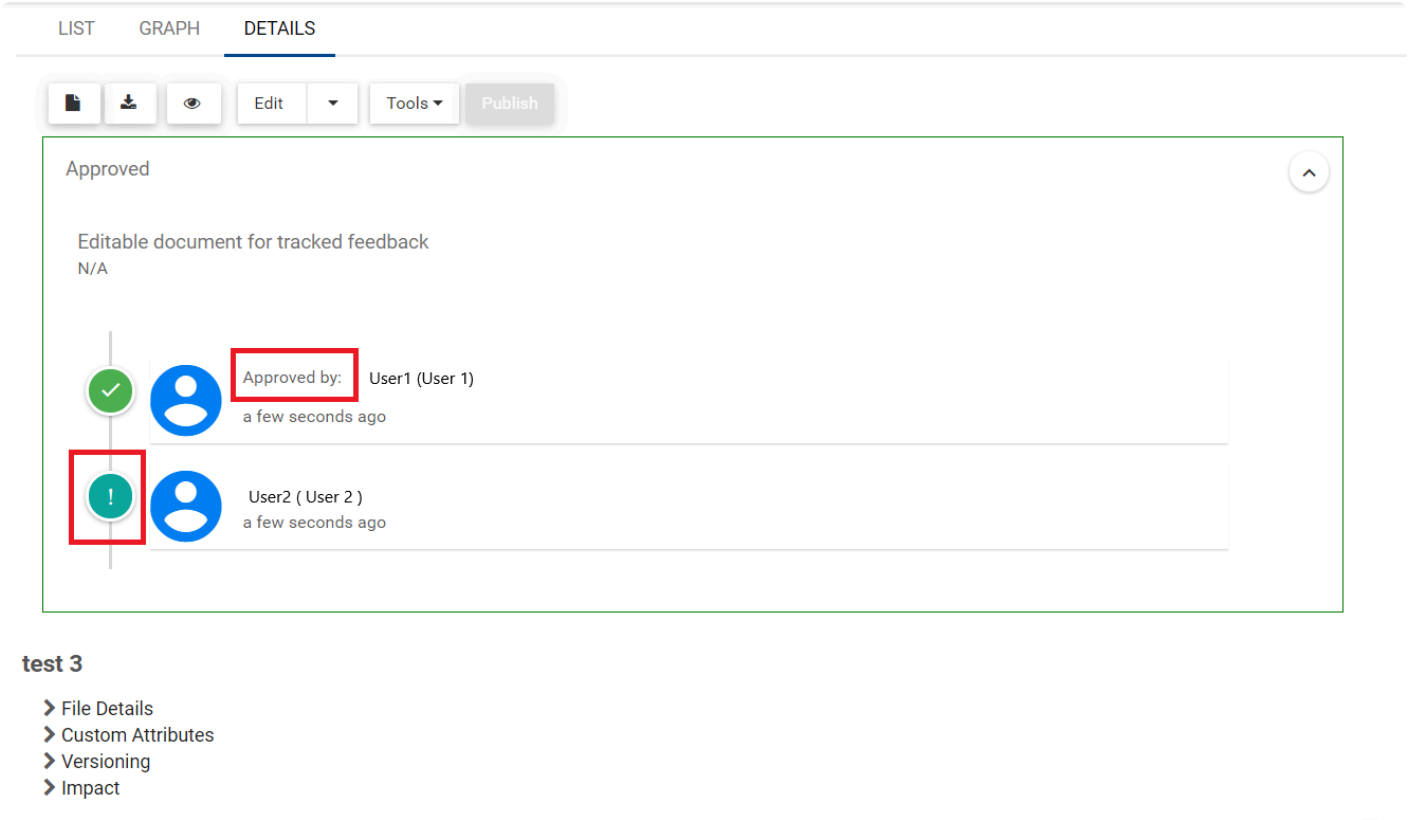


8. Click on the **Save** button.

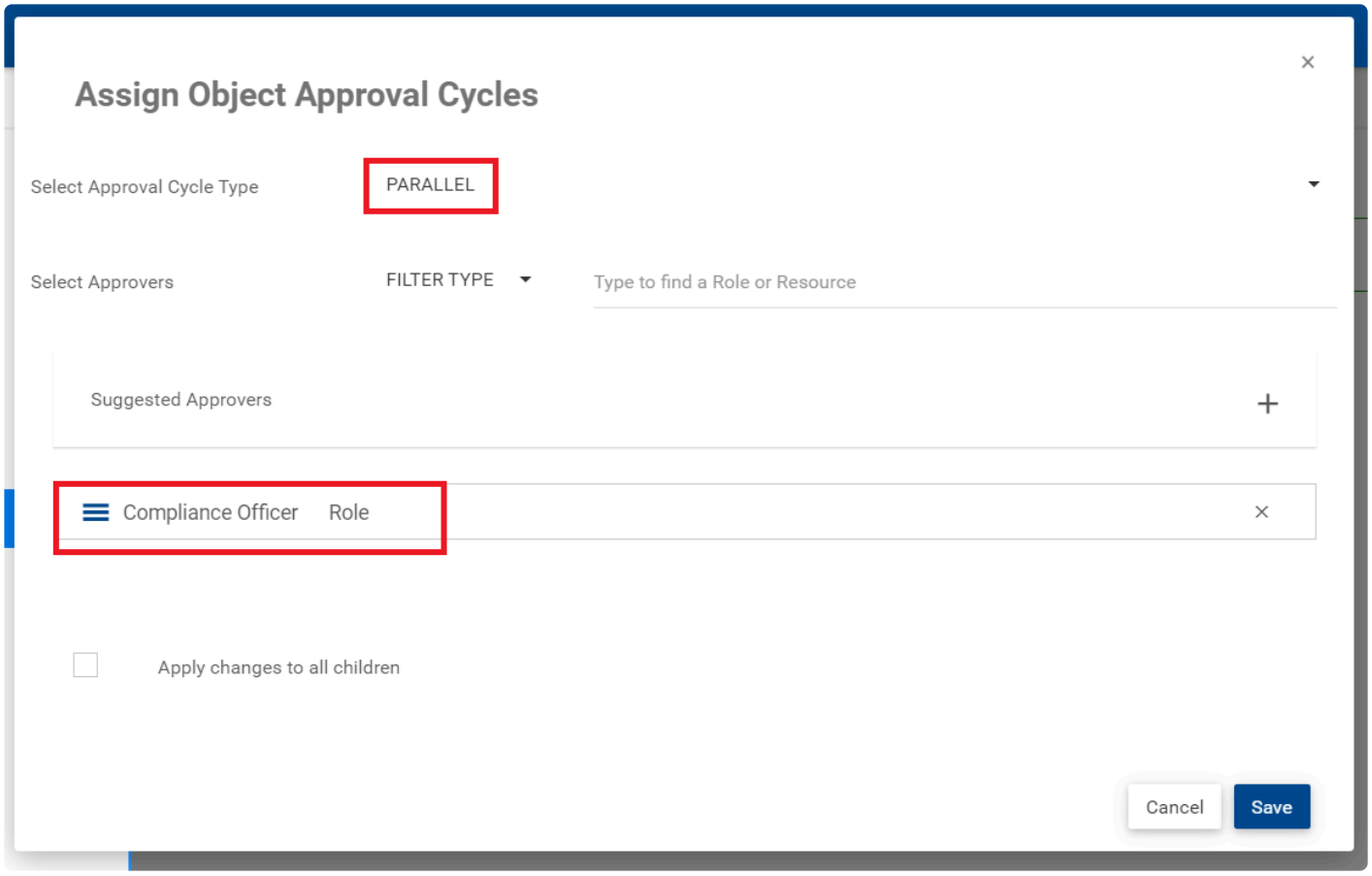
9. You will see that the first resource has status waiting for approval and pending for the next resources in the role.



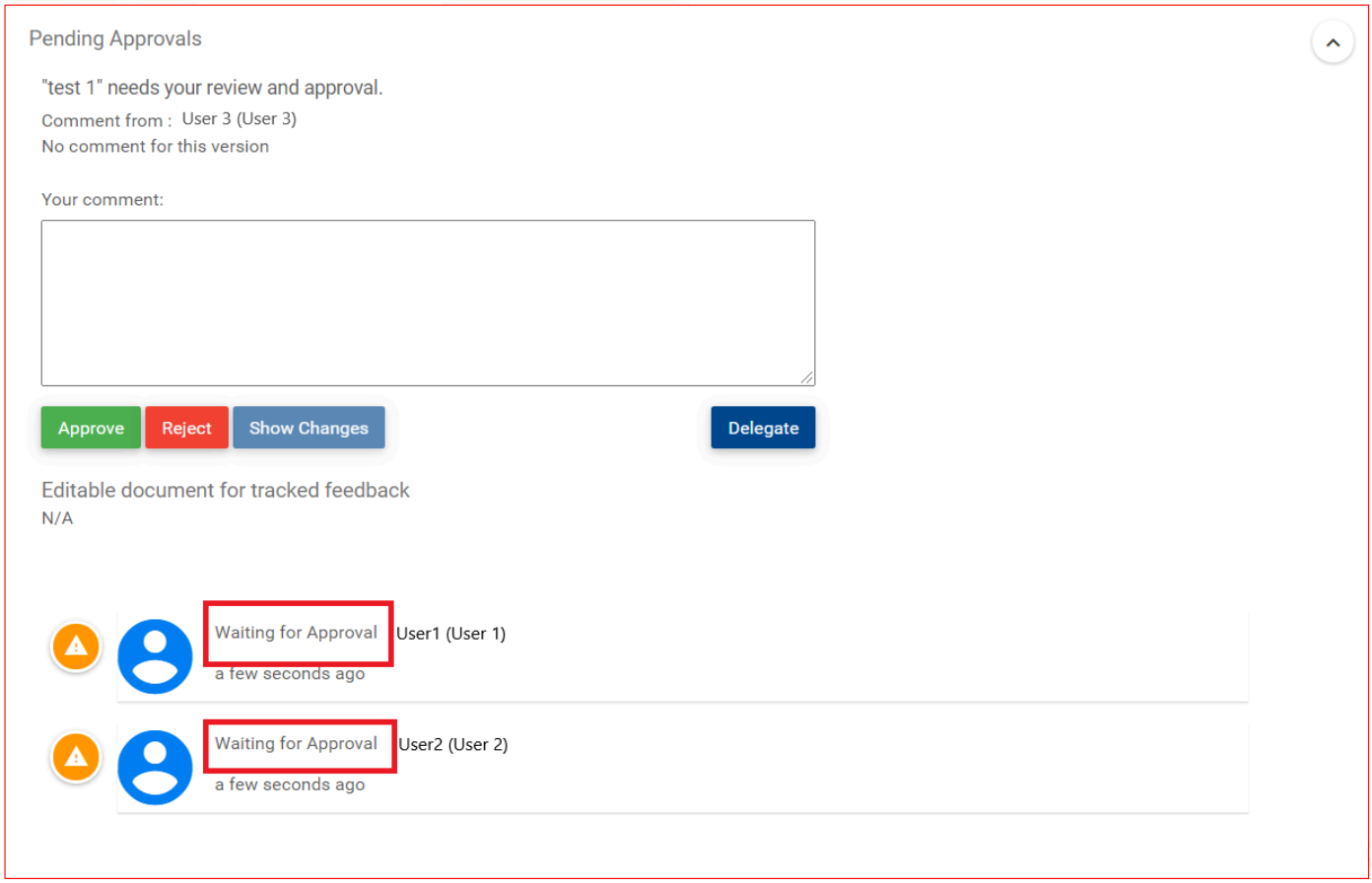
10. Once the object has been approved by the first resource, this resource has the status Approved by the user's name. The next resources have an admiration icon to show that they didn't need to approve.



11. When you select approval Cycle type is PARALLEL, then all the resources receive the approval request at the same time. Only one resource in the roles is needed to approve the object.



12. The two resources in the role have the Waiting for Approval status. Any of these resources can approve the object.


Pending Approvals
"test 1" needs your review and approval.
Comment from : User 3 (User 3)
No comment for this version
Your comment:
Approve
Reject
Show Changes
Delegate
Editable document for tracked feedback
N/A
Waiting for Approval
User1 (User 1)
a few seconds ago
Waiting for Approval
User2 (User 2)
a few seconds ago

12.1.4 Import/Export Content

The EPC WebApp can import and export various types of content, including EPC content, Visio content and BPMN content (import only).

Further explanations regarding these specific files are detailed in the following sections:

- 12.1.4.1 Import/Export EPC Content
- 12.1.4.2 Import/Export Visio Content
- 12.1.4.3 Import/Export BPMN Content
- 12.1.4.4 Import Master Data Content
- 12.1.4.5 Import Excel Content

Lock

Importing content into object that is being edited by another user is prevented. The user will receive a lock error message. An example of a message is given is the Edit Lock page.

Exporting any object that is being edited by another user is not prevented. The user will not receive a lock error message. The exported content will be the latest saved version.

12.1.4.1 Import/Export EPC Content

Environment Administrators can import EPC data from outside environments into their own environment. They can also export their environment to EPC data files.

> Overwrite is only supported for a unidirectional export/import (ex: export from environment A > import to environment B). This means that data will only be overwritten if the export is performed from the same source environment (environment A) and then re-imported into the same destination environment (into environment B).

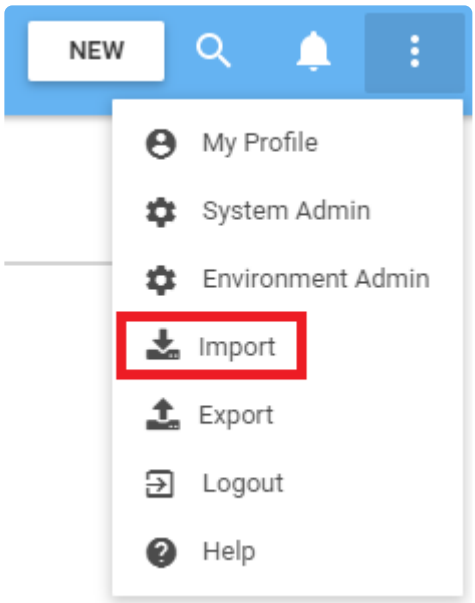
> Overwrite is **NOT** supported for a bidirectional export/import (ex: export from environment A > import to environment B > export from environment B > import to environment A). This scenario will result in the creation of duplicate objects during the last import to environment A because EPC treats all the data as new objects.

12.1.4.1.1 Import EPC Content

Follow the steps below to import data from an outside EPC environment. The format of the data file must be .epc.

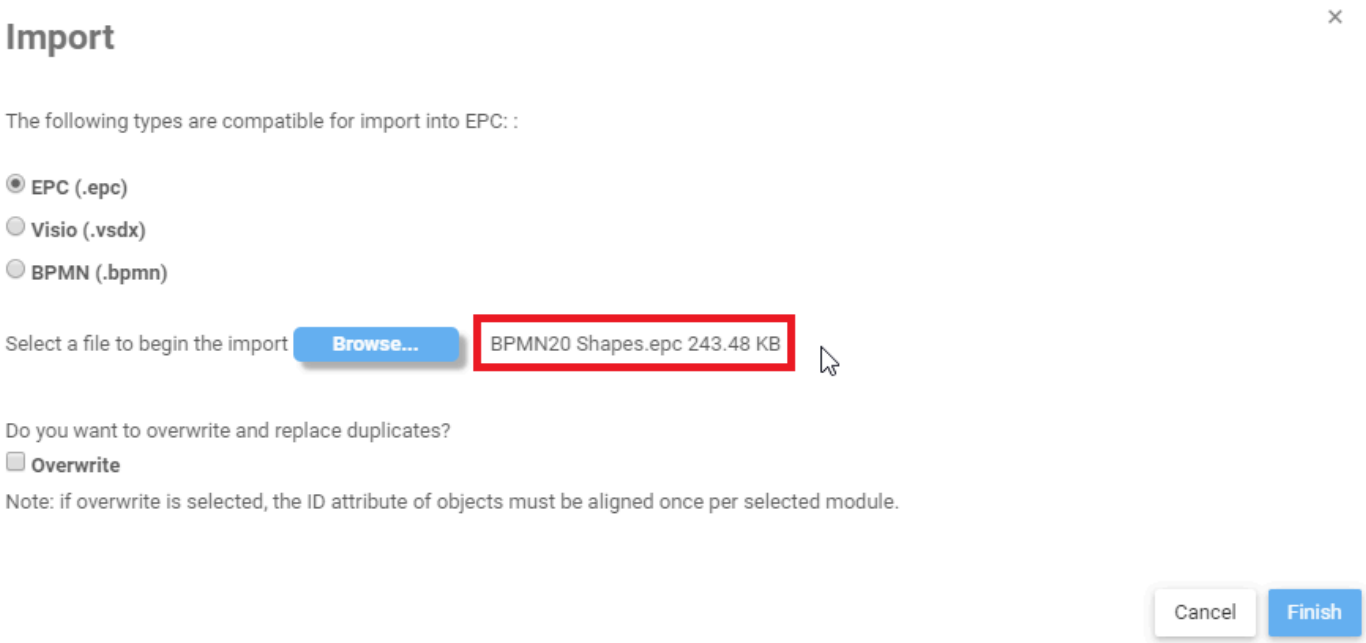
NOTE: Users are now able to import from EPC, Visio and BPMN.

1. From the WebApp Toolbar, select the three dots > Import



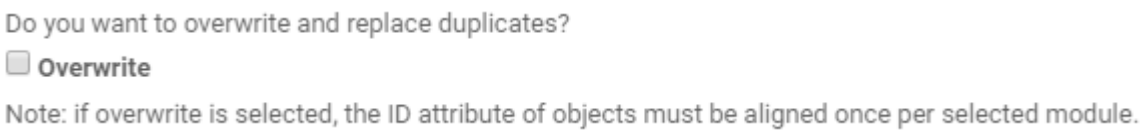
2. Select EPC (.epc) and click Browse to select the file.

3. The file you have selected will appear.

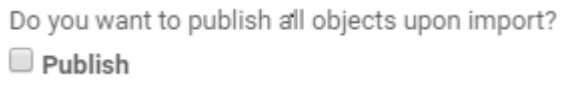


4. If the import file contains published objects, you will be asked if you want to overwrite and replace duplicates. Select Overwrite to combine duplicate objects in your environment. If you do not select Overwrite, then any duplicate objects already present in your current EPC Environment will be duplicated.

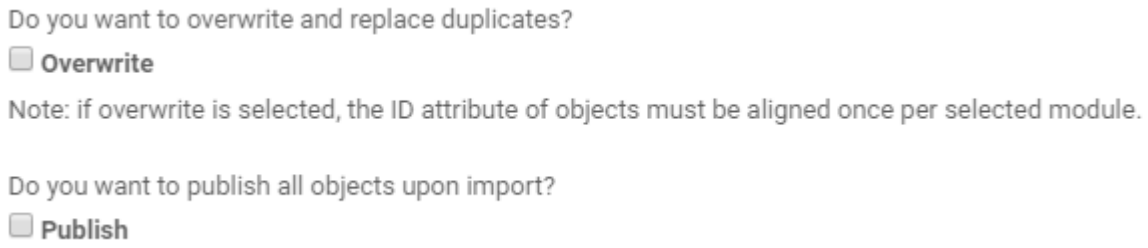
> **NOTE**: Duplicate EPC objects must have the same object ID (a unique number assigned automatically when the object is created) and originate from the same EPC environment.



5. You will also be asked if you want to publish upon import.

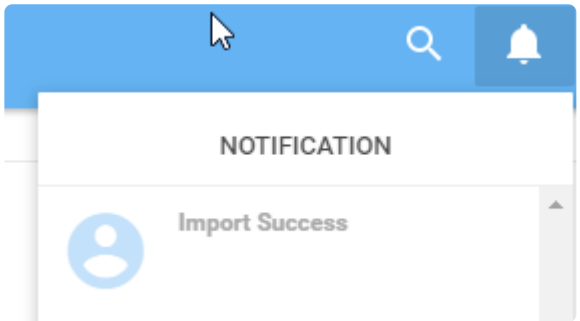


Both questions can be asked simultaneously:



6.Once you have selected what you wanted, click on Finish.

7. You will receive a confirmation when the import is complete.



8. Once the import is complete, you will find all imported objects within their respective modules.

> Users can also import UDA's and their content into the EPC.

Localization Import

EPC Import is supported for localized processes. Refer to localization for more information.

> ! When importing an EPC file that contains localized content, it is preferable to create the same localization values to ensure proper importing. For more information on localization

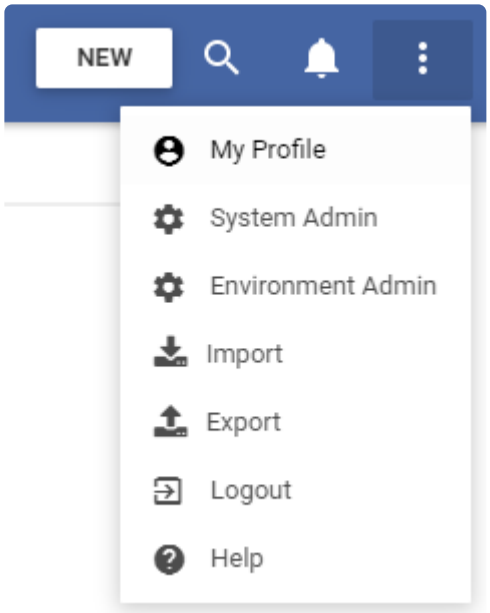
values, refer to the localization tab.

When importing, the system will verify in the target environment if the same localization values that exist in the source environment is present. If not, the system will create new localization values and import the localized copies of processes accordingly.

12.1.4.1.2 Export EPC Content

Users can export their entire EPC environment or a few select objects by using EPC Export

To access the export function, navigate to the system menu located on the top right corner of the EPC and click on Export:



From here, you can:

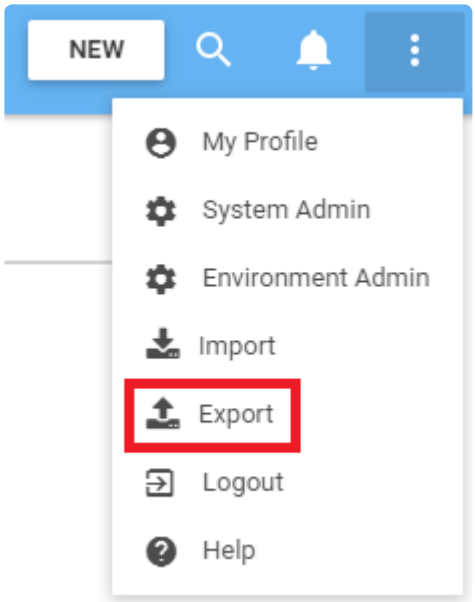
- Export your environment
- Export specific objects

> For specific objects, only processes are supported at the moment. Other EPC objects will become available in later releases.

12.1.4.1.2.1 Export EPC Environment

Follow the steps below to export data from your current EPC environment. The export wizard will create a data file with the format .epc.

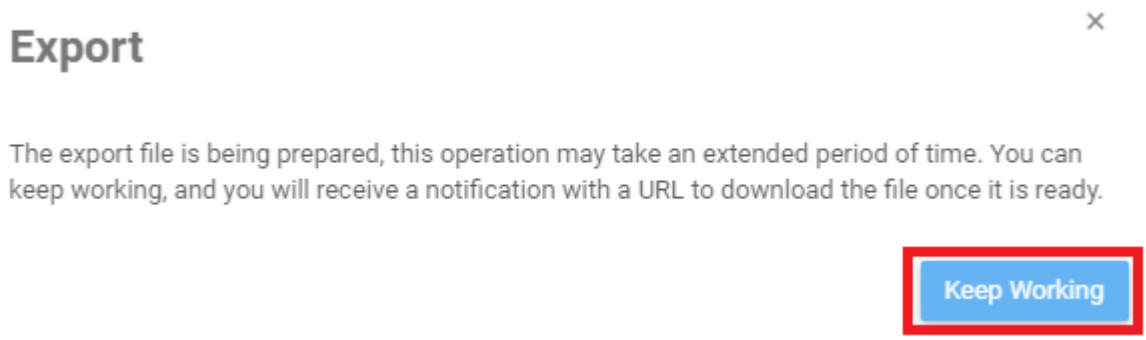
1. From the WebApp Toolbar, select the three dots > Export



2. Select **EPC (.epc)** and click **Export**.

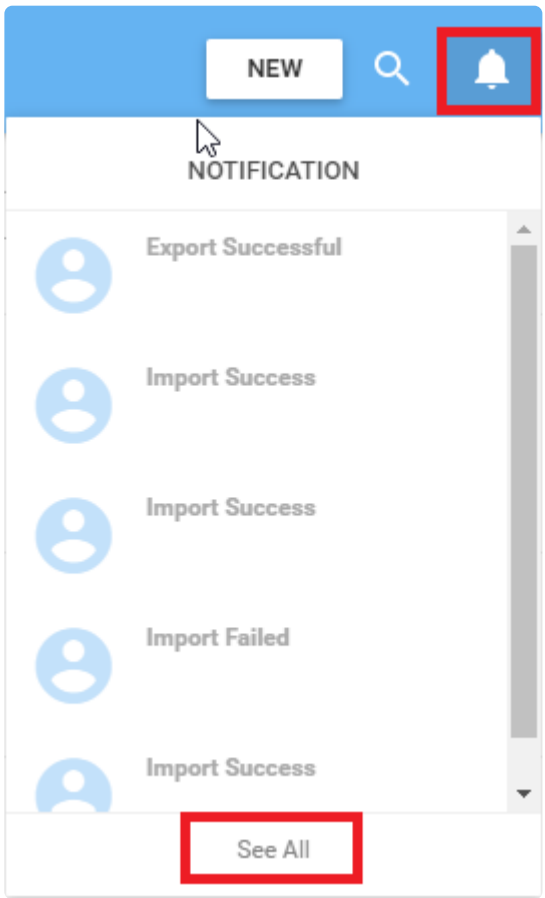
3. Once you are done, click on **Export**.

4. A window will open to inform you on the export. Click **Keep Working**.

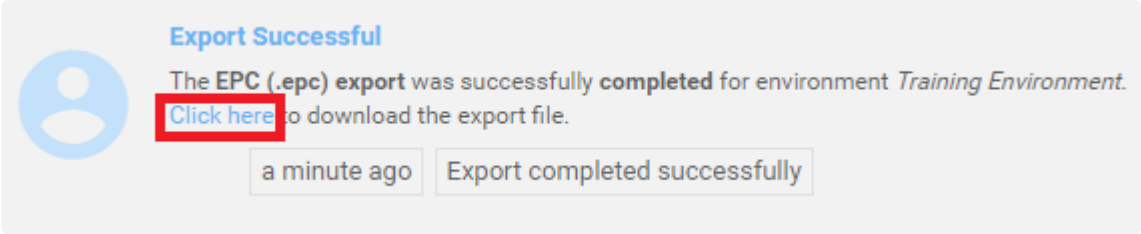


Since some exports can take an extended period of time to prepare, keep working during this period.

5. You will will receive a confirmation when the export is complete. Click on **See All**.



6. The **"Export Successful"** notification contains the link to download the export file in the requested format.

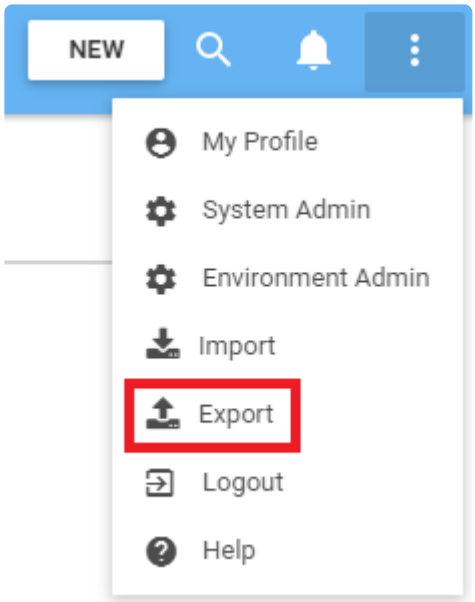


Users can also export UDA's and their content into the EPC

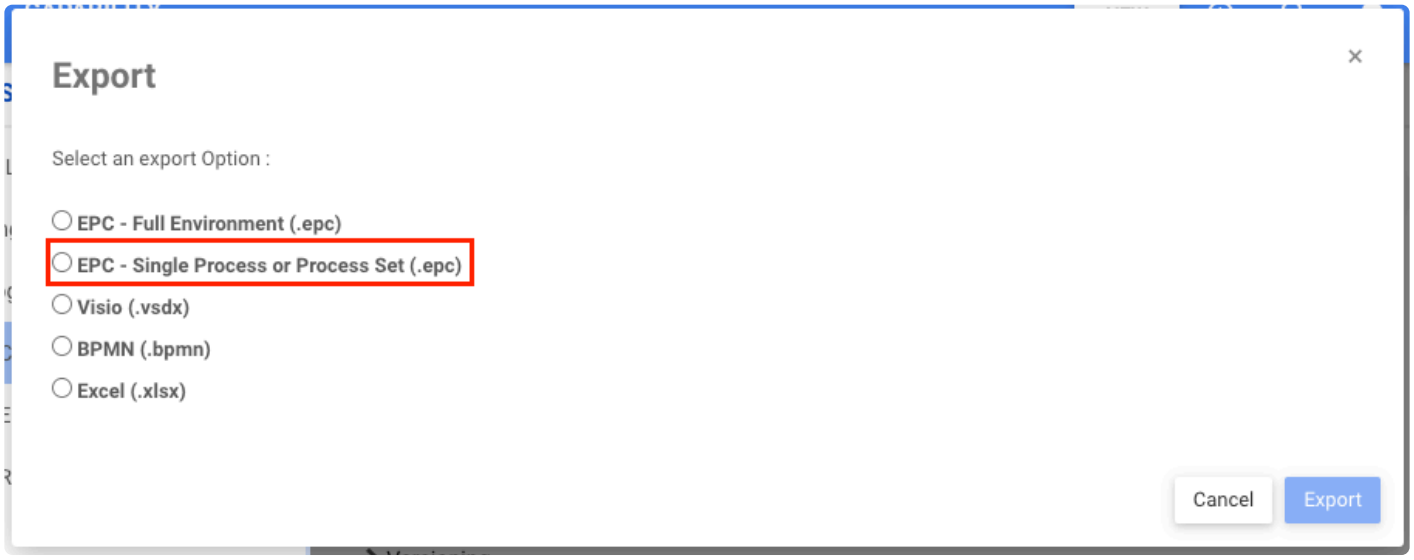
12.1.4.1.2.2 Export EPC Objects

Follow the steps below to export specific EPC Objects. The export wizard will create a data file with the format .epc.

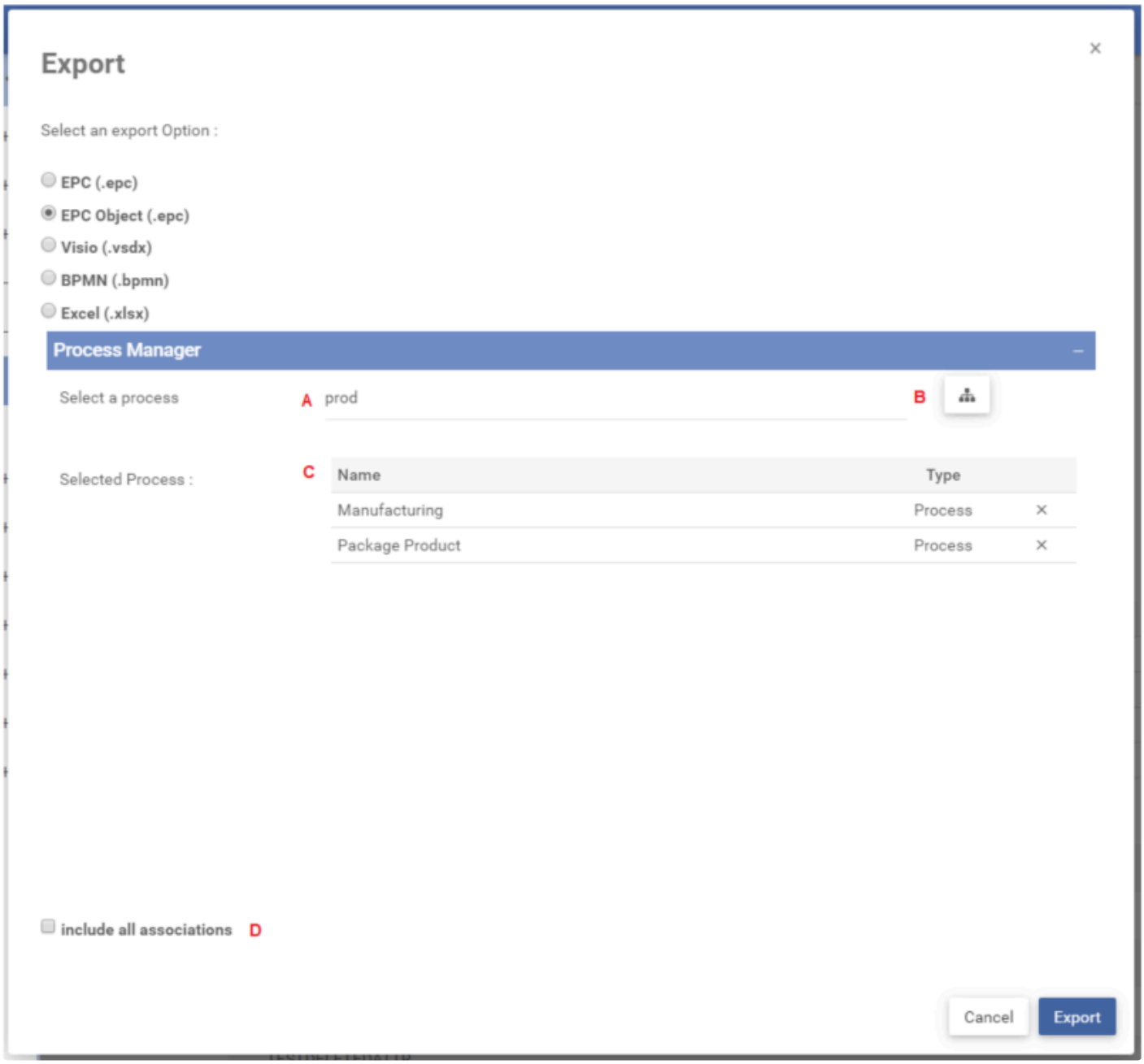
1. From the WebApp Toolbar, select the three dots > Export



2. Select **EPC Object (.epc)**



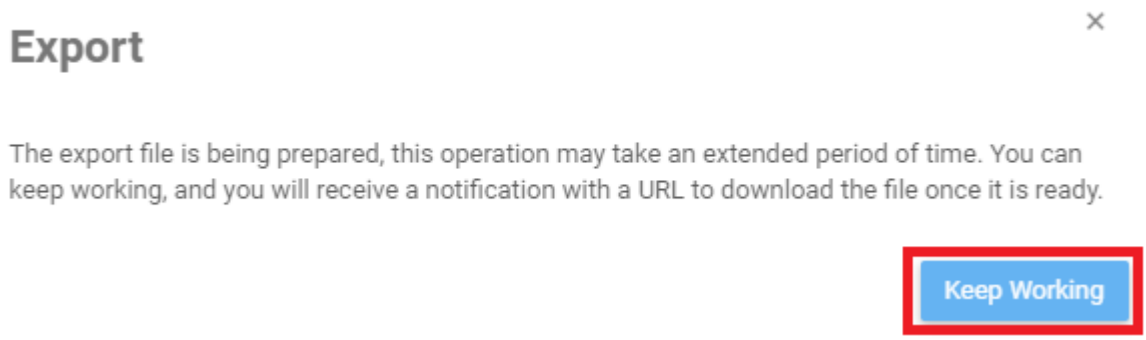
3. Select one or more processes to export



A	Type to search for a specific process
B	Click on this button to search by hierarchy
C	Processes being exported will be listed here. Click on “X” to remove a process from the export list
D	Include all associations of this process within the export file

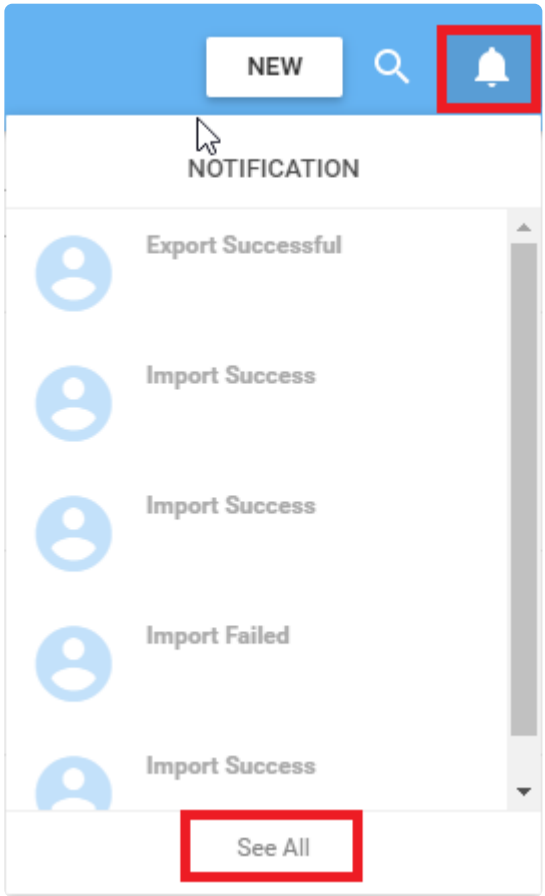
4. Once you are done, click on **Export**.

5. A window will open to inform you on the export. Click **Keep Working**.

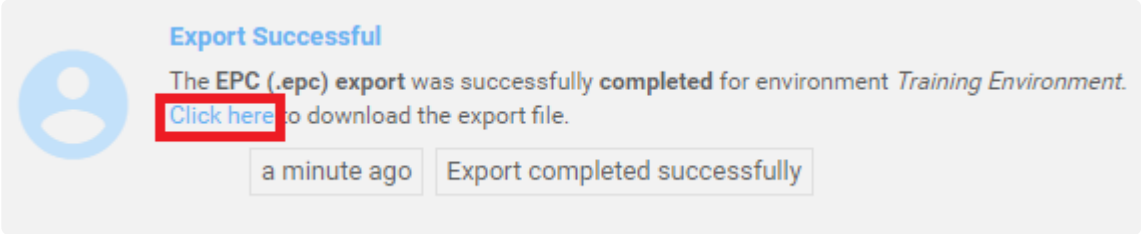


Since some exports can take an extended period of time to prepare, keep working during this period.

6. You will will receive a confirmation when the export is complete. Click on **See All**.



6. The **"Export Successful"** notification contains the link to download the export file in the requested format.


Export Successful
The EPC (.epc) export was successfully completed for environment Training Environment.
Click here to download the export file.
a minute ago
Export completed successfully

12.1.4.1.3 Multi-Language Support in EPC

NOTE: This feature requires a multilingual license.

If you are using EPC version 9.7 or newer (with a multilingual license), please read the following for important import/export information.

What will happen when I import a file that predates version 9.7 into an environment running a 9.7 build (with a multilingual license)?

If the file to be imported is of type .epc, then the data is imported using the highest priority language that is set in the admin panel (default language is English).

Make sure to set your Content Language to the same language as the content in the single-language import-file.

How can I import and export my environment data in multiple languages given that I have EPC version 11 (with a multilingual license)?

- Importing
  When translated content is imported from an .epc file, the data is stored separately in the database for each language found. The content is displayed when the appropriate language is selected for Content Language

- Exporting
  All object content in all languages is saved in the exported .epc file.

12.1.4.2 Import/Export Visio Content

Environment Administrators can import Visio (.vsdx files) data into their EPC environment.

Environment Administrators can also export EPC processes to Visio (.vsdx files).

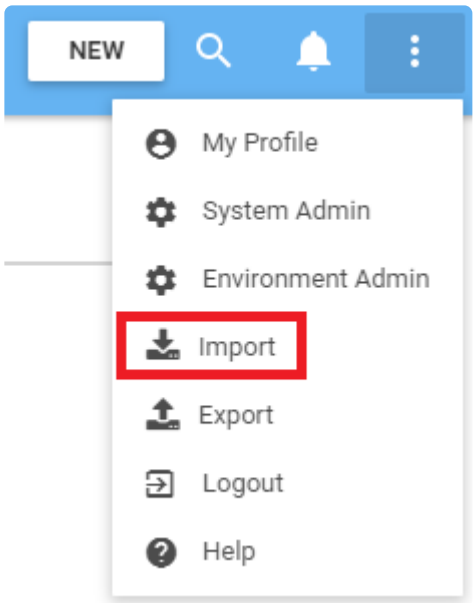
> ! The Visio Export function is **BETA**. The Visio Export (BETA) is a version that is put in place for testing and its functionalities are limited. The outcome in Visio might differ from how it looks on EPC. You can be assured using this function will **not** affect the existing EPC data

12.1.4.2.1 Import Visio Content

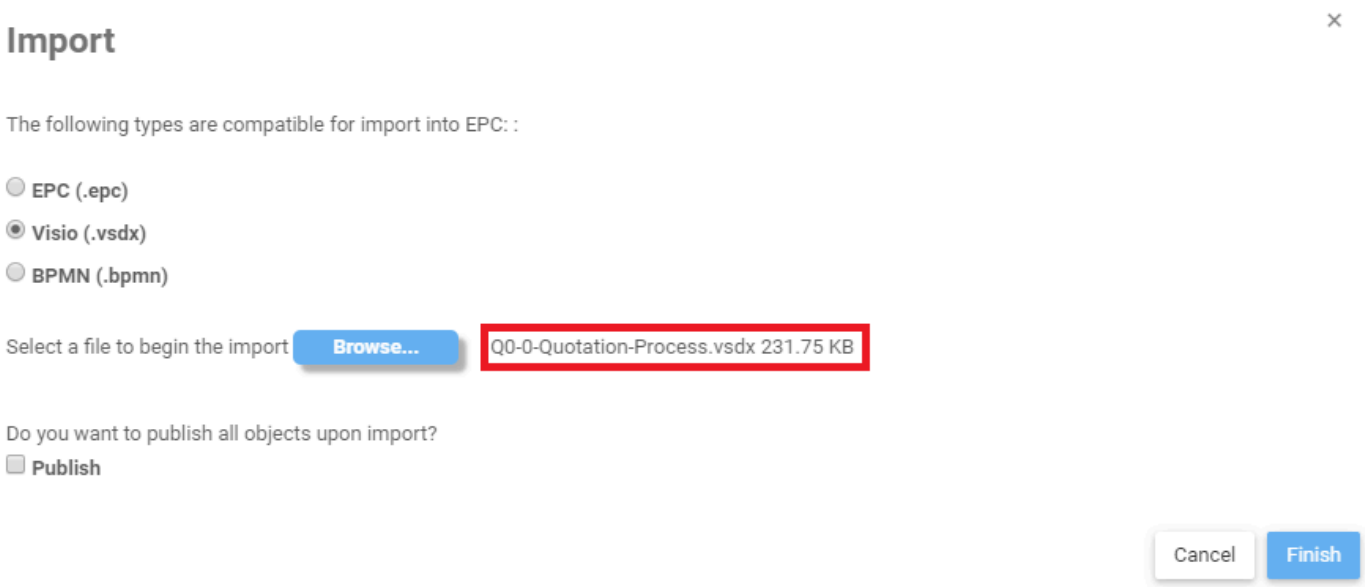
Follow the steps below to import data from an outside EPC environment. The format of the data file must be .vsdx.

NOTE: Users are now able to import from EPC, Visio and BPMN.

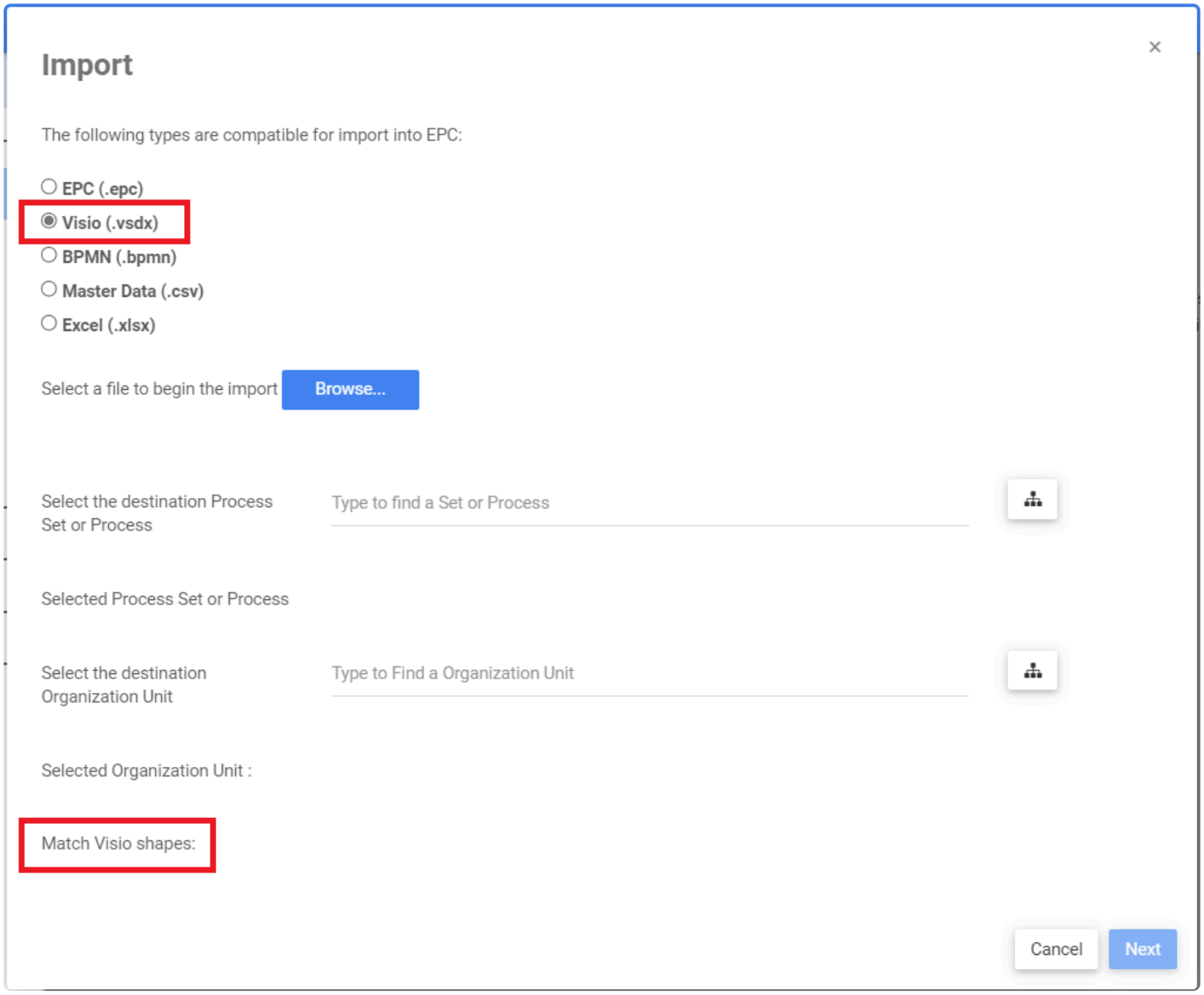
1. From the WebApp Toolbar, select the three dots > Import



2. Select Visio (.vsdx) and click Browse to select the file.



3. Once the Visio Document is chosen, users can select where the process will be located, in which organization unit the roles will be created and match the shapes of Visio. To do this, the users can: a) Type to find your destination or b) Use the Tree selector



4. You will also be asked if you want to publish/overwrite upon import.

Do you want to overwrite and replace duplicates?

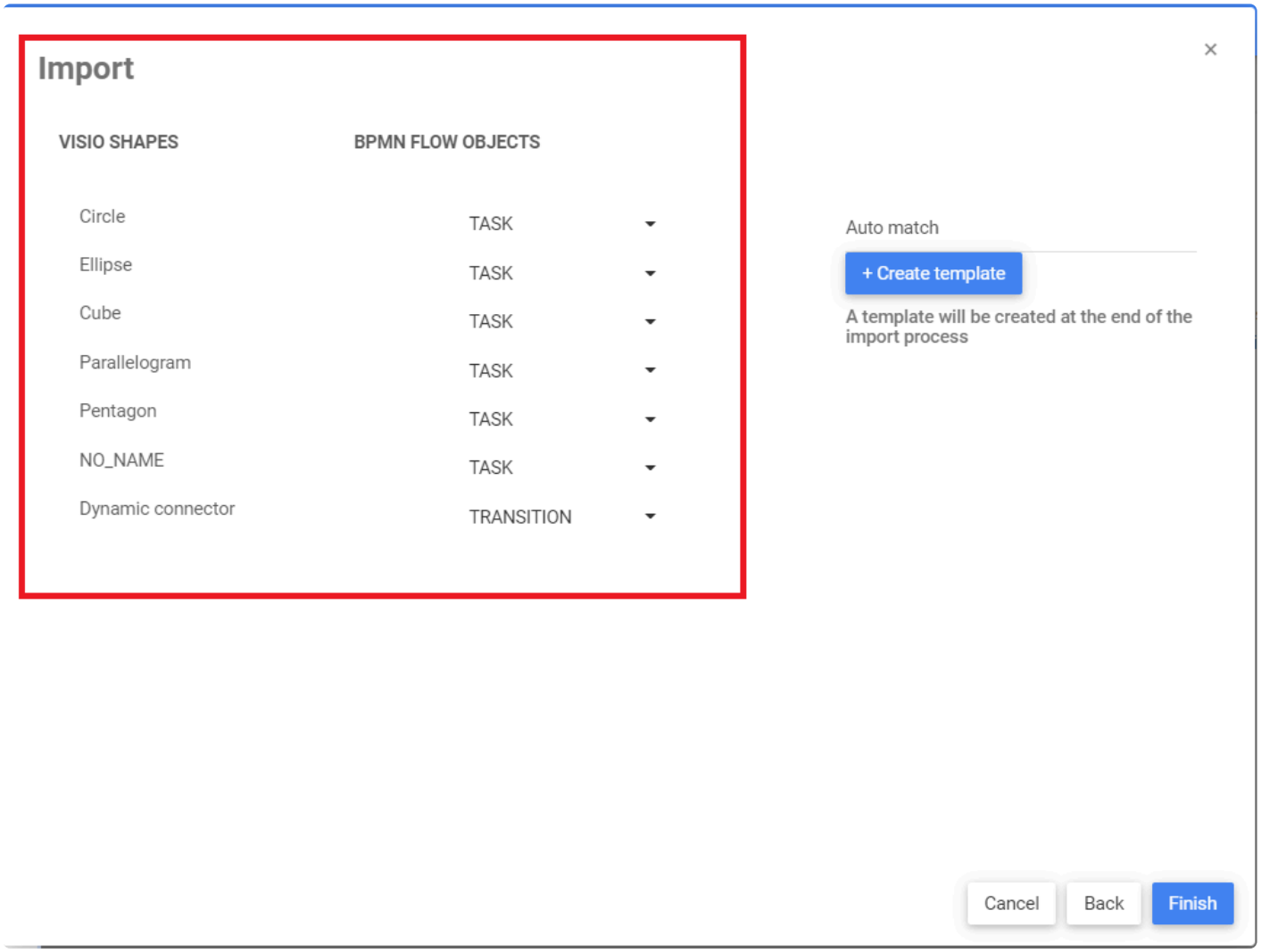
☐ **Overwrite**

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

Do you want to publish all objects upon import?

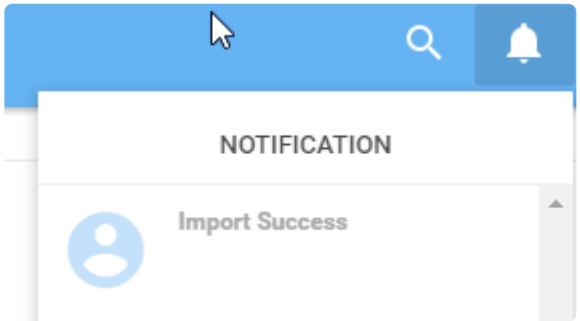
☐ **Publish**

5. When ready, click on the **Next button**. A window opens allowing the user to select which BPMN shapes are equivalent to the ones in Visio.

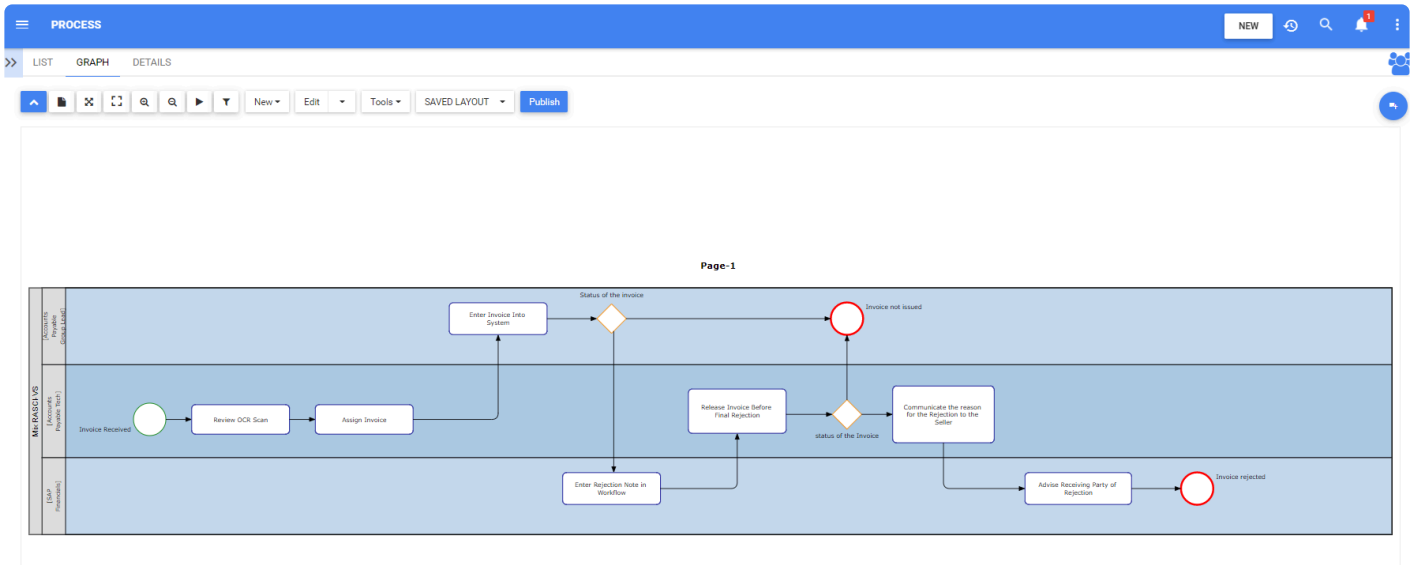


6. Once you have selected what you wanted, click on Finish.

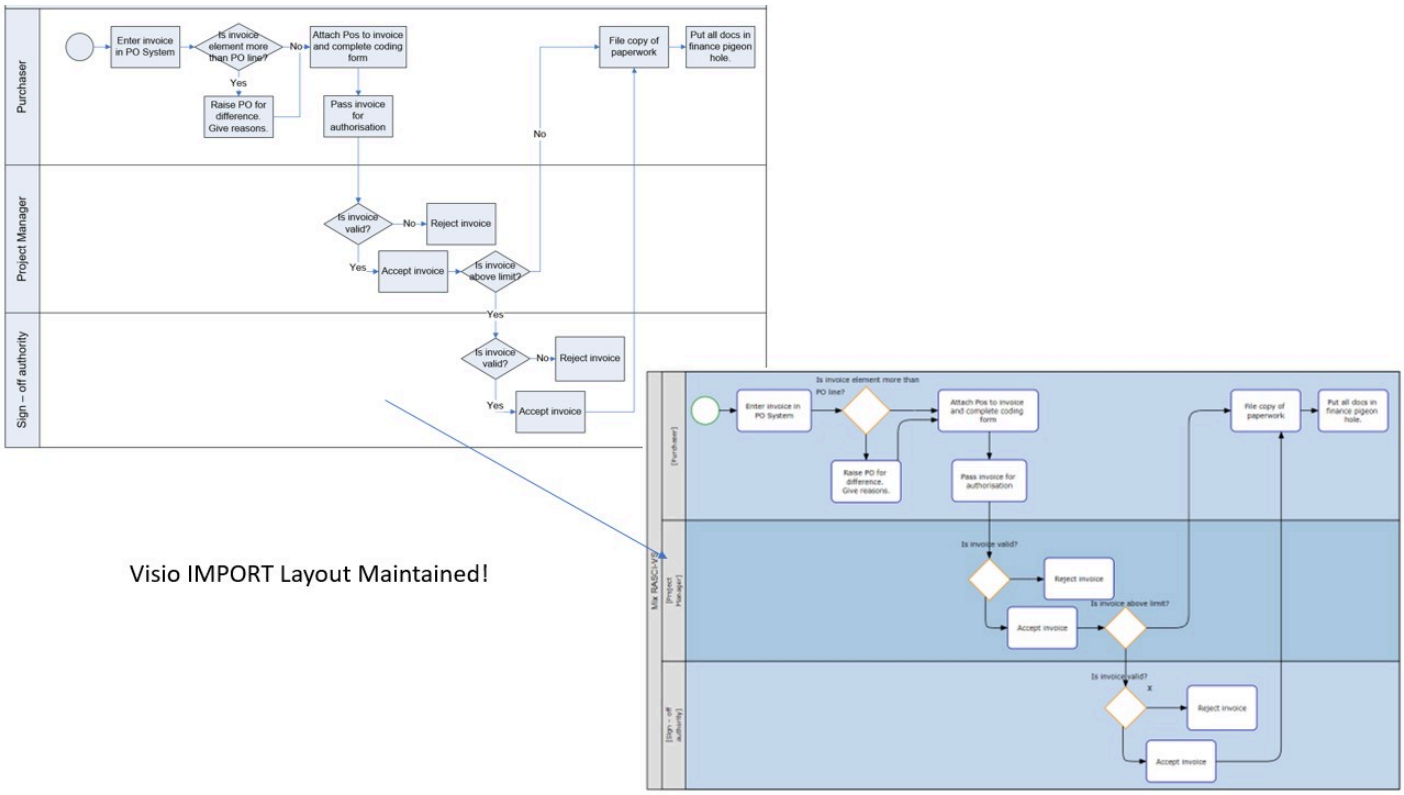
7. You will receive a confirmation when the import is complete.



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

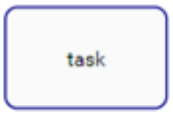


Here’s a real use case example:



12.1.4.2.1.1 Import from Visio Rules

NOTE: For compatibility purposes, the following elements will be recognized by the EPC Modeler. All elements NOT in the table below will be imported as Tasks.

Visio Shapes	EPC Translation	Name
Basic Flowchart Shapes		
		Start Event
		Intermediate Event
		End Event
		Task
		Sub-Process
		Gateway

Cross-Functional Flowchart Shapes		
or		Swimlane
Transitions		
		Sequence Flow
		Message Flow
		Association Flow

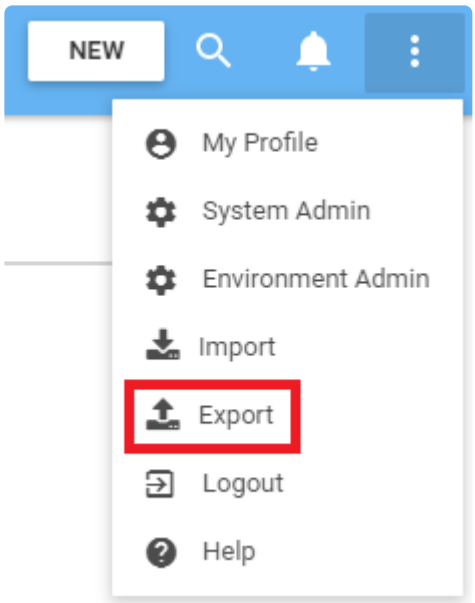
Visio Sub-Process Importing

The EPC Modeler has the ability to upload and classify Processes and Sub-Processes when Importing Processes from Visio.

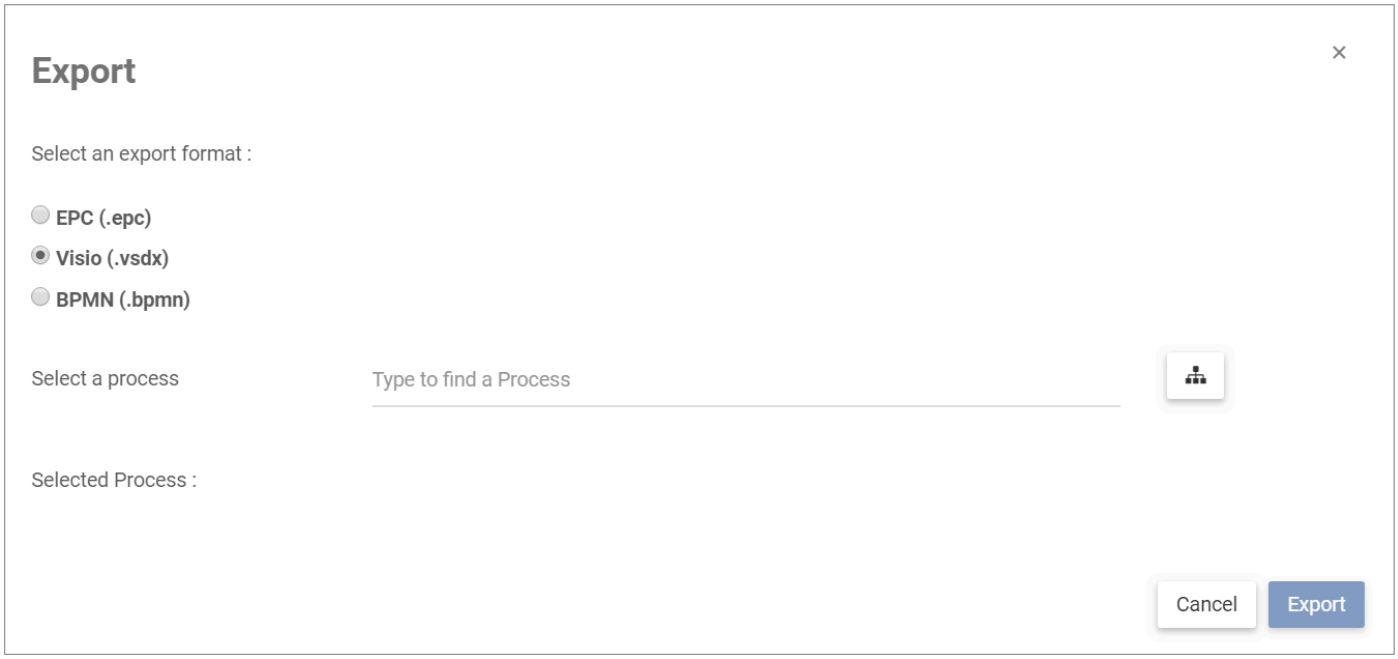
12.1.4.2.2 Export Visio Content

Follow the steps below to export data from your current EPC environment. The export wizard will create a data file with the format .vsdx.

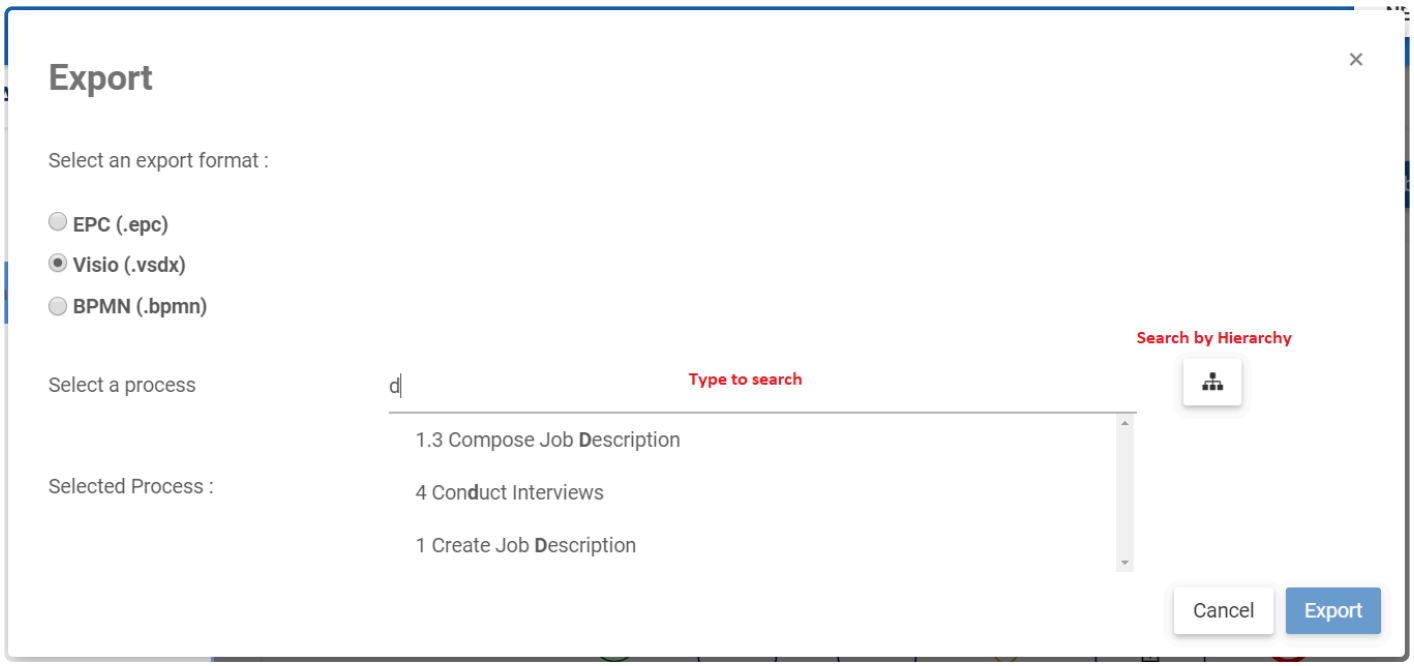
1. From the WebApp Toolbar, select the three dots > Export



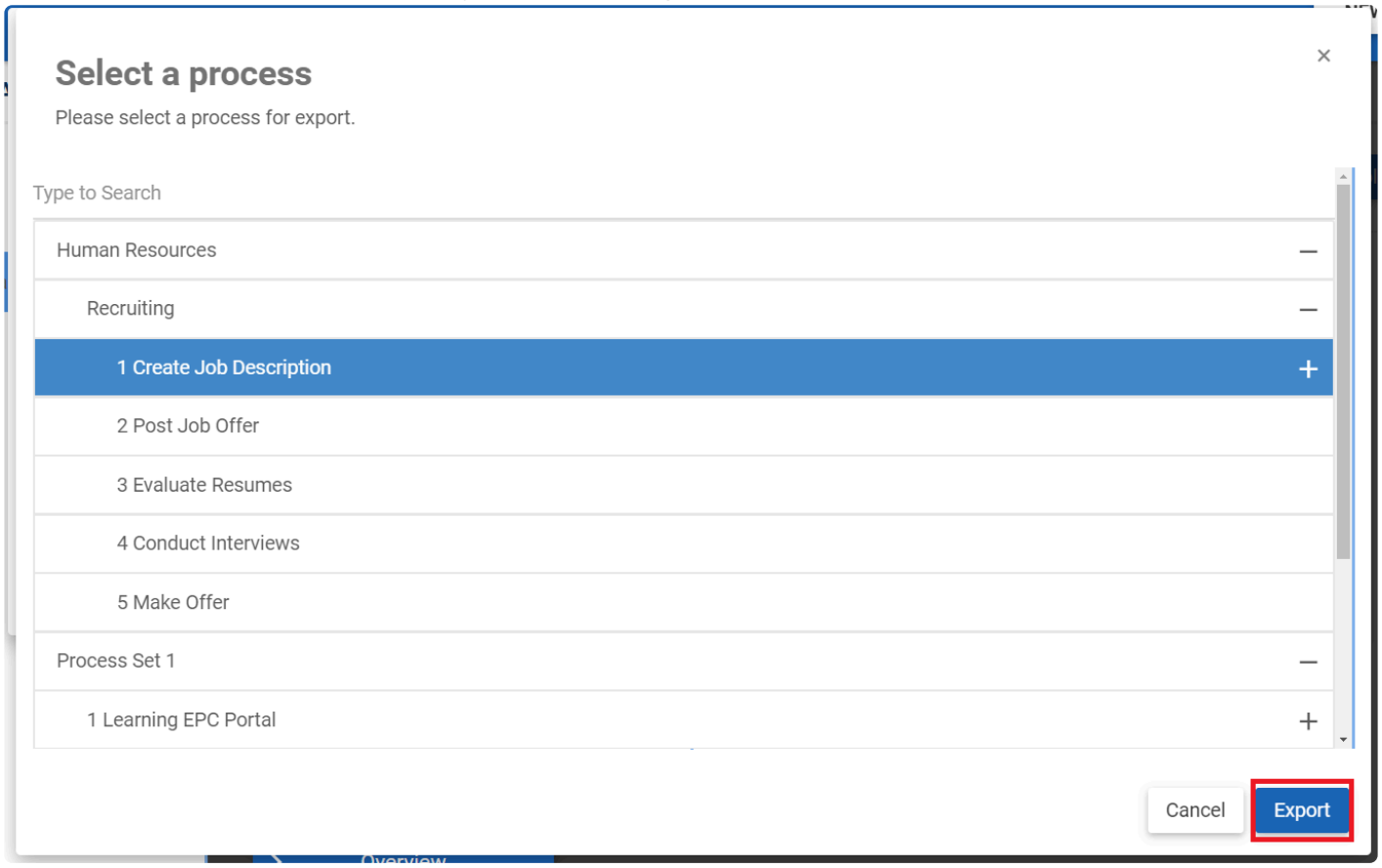
2. Select **Visio (.vsdx)**.



3. Type in the “Selected Process” section the name of the process you wish to export, or search by hierarchy.

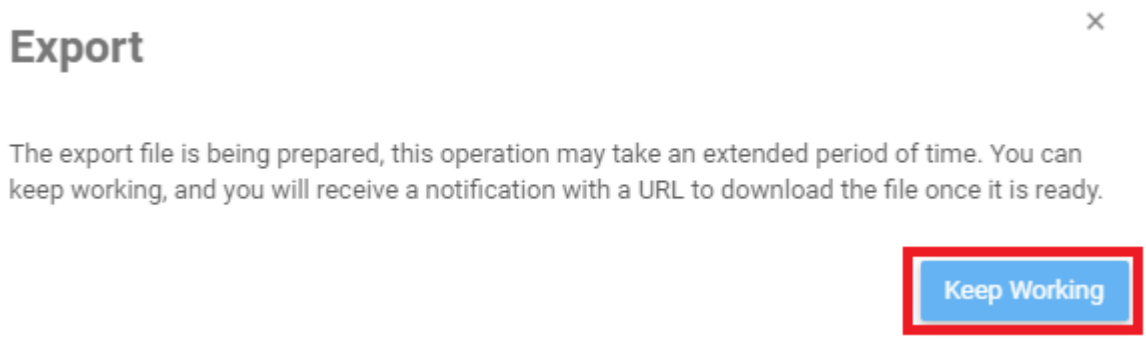


4. If you are searching by hierarchy, click on the process you wish to export. When you are done, click on “Export”. The window will close and you will be brought back to the initial export window.



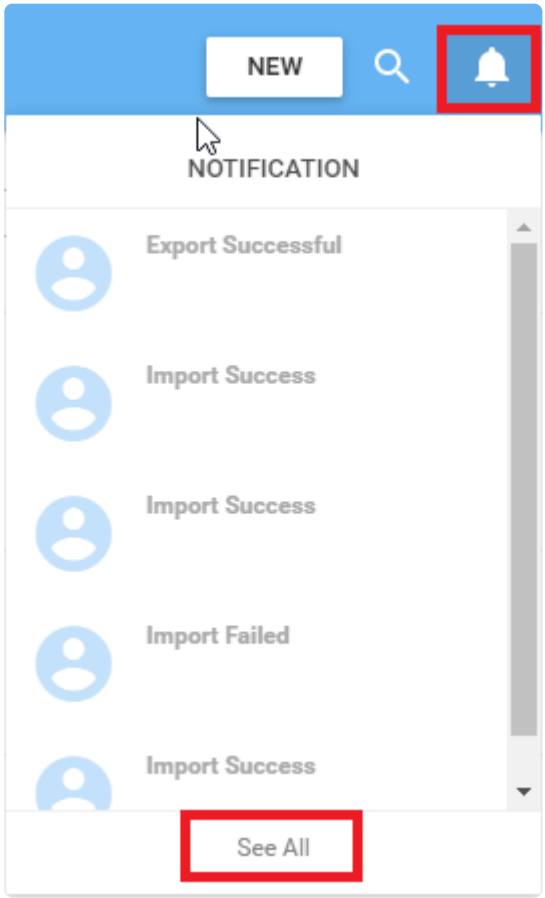
5. Once you are done, click on **Export**.

6. A window will open to inform you on the export. Click **Keep Working**.

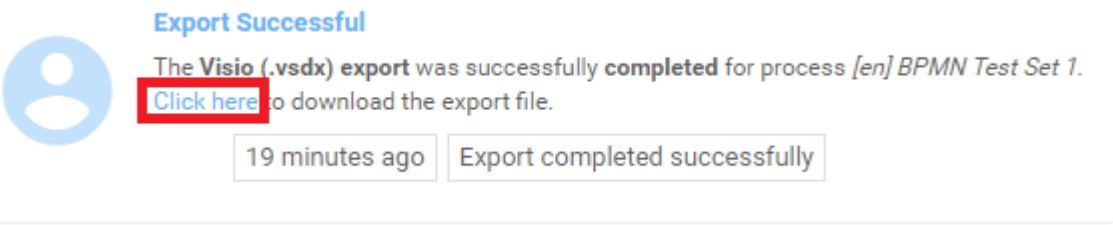


Since some exports can take an extended period of time to prepare, keep working during this period and wait for the notification.

5. You will will receive a confirmation when the export is complete. Click on **See All**.



6. The **"Export Successful"** notification contains the link to download the export file in the requested format.



Re-Layout Process Map in Visio

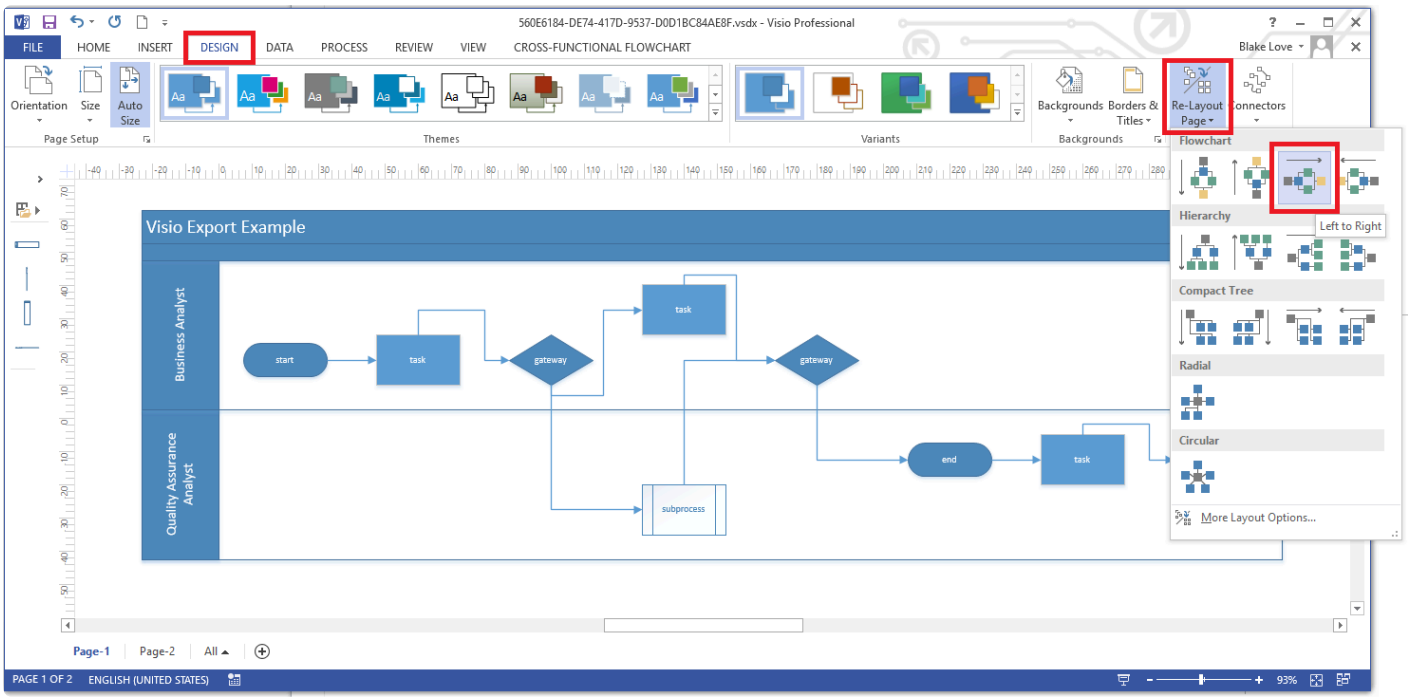
When processes are exported to visio, the coordinates of all shapes are not exported. The maps therefore require a re-layout of the map in Visio before they are readable.

1. Open the .vsdx file containing your exported process in Microsoft Visio

2. Select the **"Design"** tab

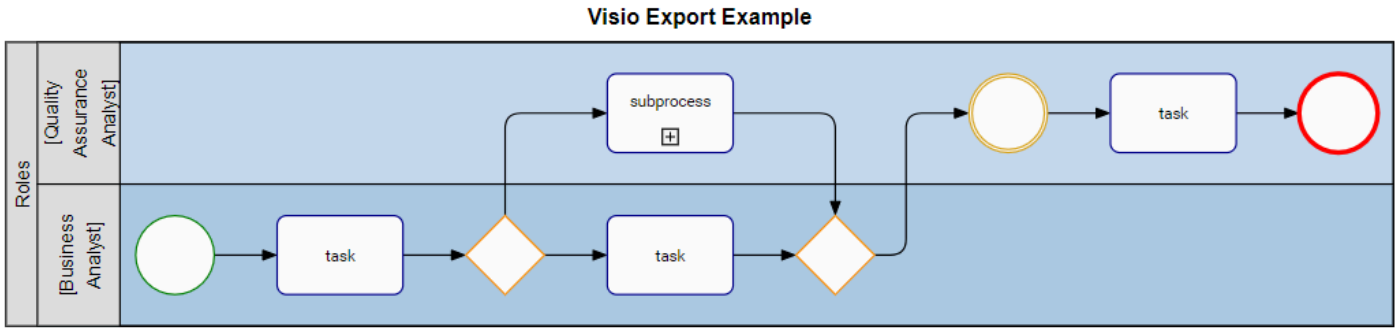
3. Select the **"Re-Layout Page"** menu

4. Click **"Left to Right"** (as shown in the screenshot below)

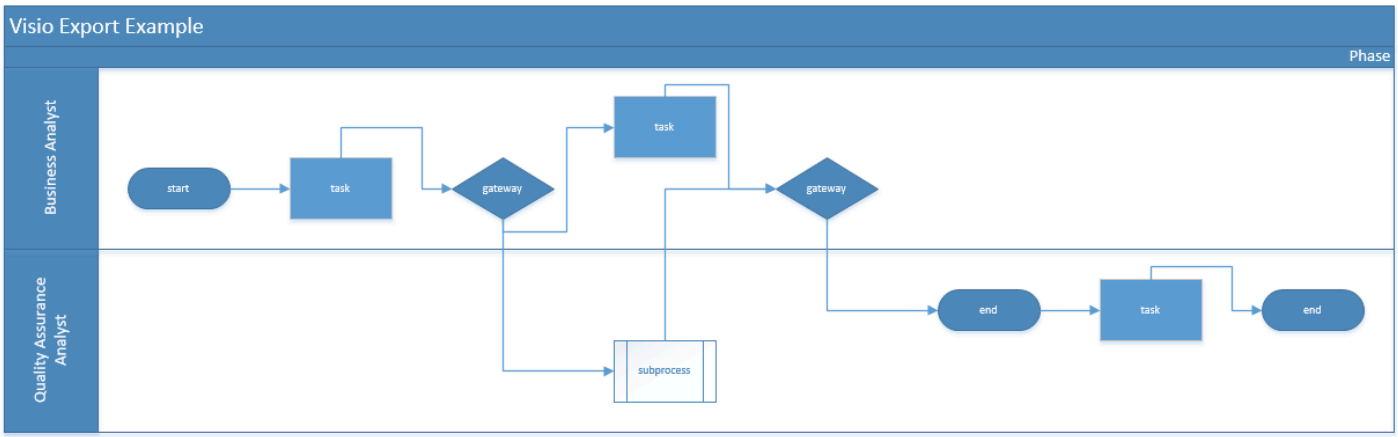


5. Once re-layout is applied, you should see a map similar to the one in EPC when in Swimlane format.

EPC Process



Visio (.vsdx) Exported Process



12.1.4.3 Import/Export BPMN Content

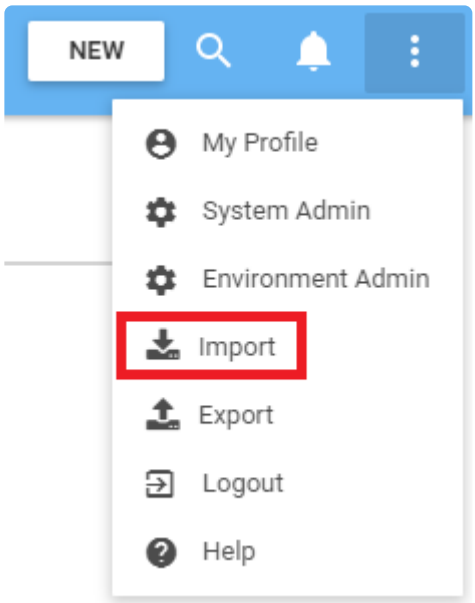
Environment Administrators can import BPMN (.bpmn files) data into their EPC environment.

12.1.4.3.1 Import BPMN Content

Follow the steps below to import data from an outside EPC environment. The format of the data file must be **.bpmn**

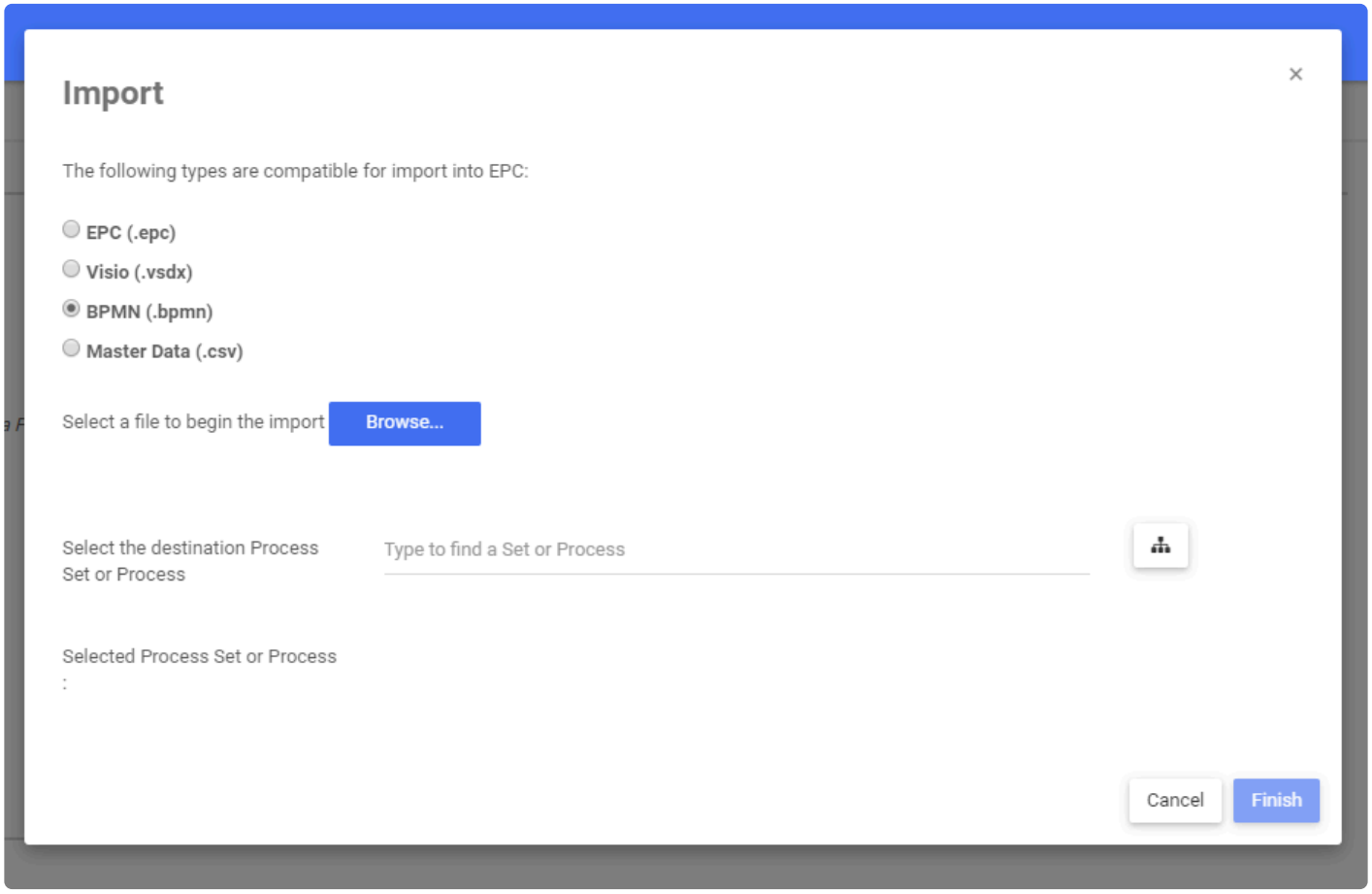
NOTE: Users are now able to import from EPC, Visio and BPMN.

1. From the WebApp Toolbar, select the three dots > Import



2. Select **BPMN (.bpmn)** and click **Browse** to select the file.

3. The file you have selected will appear.



4. Select a destination for the file

4a) Type to find the process you wish
4b) Use the tree selector to find its location

5. If the import file contains published objects sets, then you will be asked if you want to overwrite and replace duplicates. Select Overwrite to combine duplicate objects in your environment. If you do not select Overwrite, then any duplicate objects already present in your current EPC Environment will not be imported.

> **NOTE**: Duplicate EPC objects must have the same object ID (a unique number assigned automatically when the object is created) and originate from the same EPC environment.

Do you want to overwrite and replace duplicates?

☐ **Overwrite**

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

6. You will also be asked if you want to publish upon import.

Do you want to publish all objects upon import?

☐ **Publish**

Both questions can be asked simultaneously:

Do you want to overwrite and replace duplicates?

☐ **Overwrite**

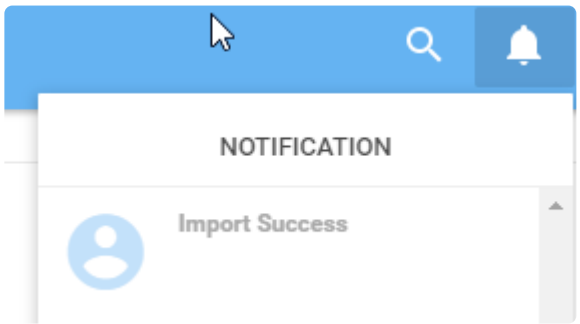
Note: if overwrite is selected, the ID attribute of objects must be aligned once per selected module.

Do you want to publish all objects upon import?

☐ **Publish**

7. Once you have selected what you wanted, click on Finish.

8. You will receive a confirmation when the import is complete.



9. Once the import is complete, you will find the imported processes in the process module. They will be in a

new Process Set named “Imported Process Set”.

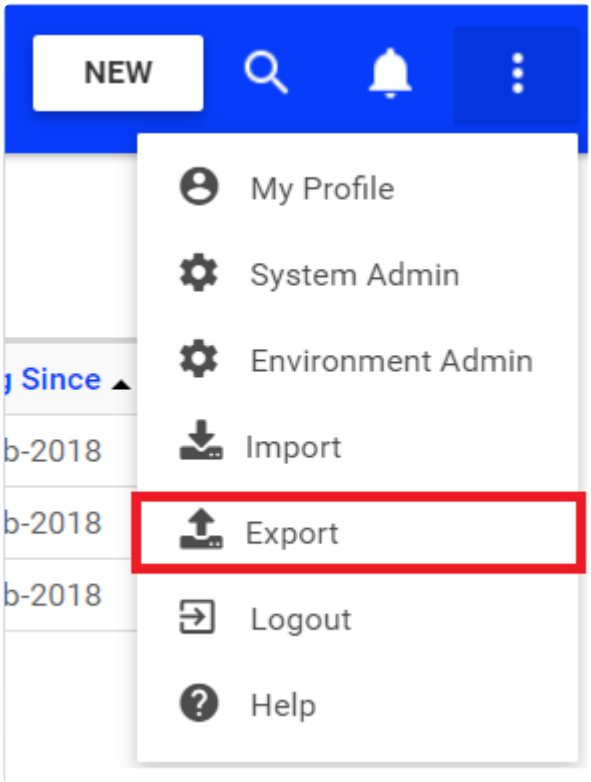
12.1.4.3.2 Export BPMN Content

Users can export EPC processes to .bpmn format. This export capability allows users to select individual processes and export them for viewing in alternative BPMN platforms.

To export a BPMN Content:

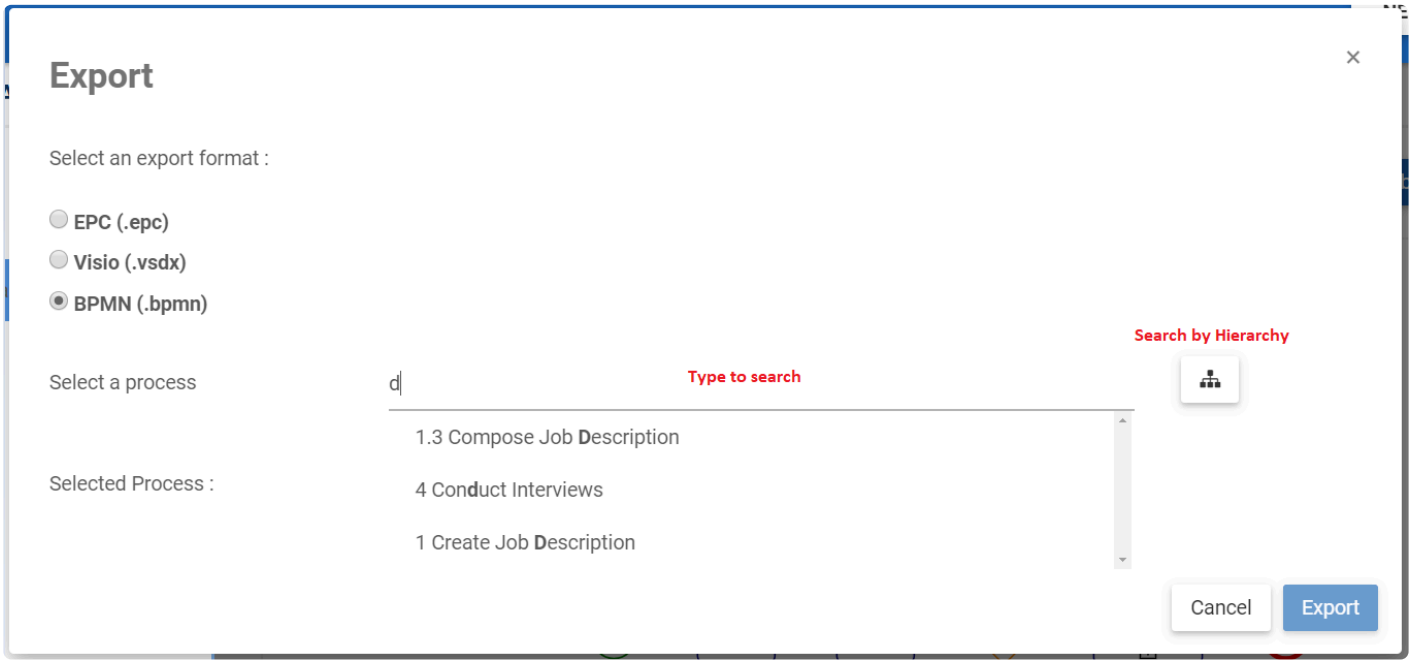
1) Select ellipsis in the upper right corner of the EPC Web App

2) Select “Export”

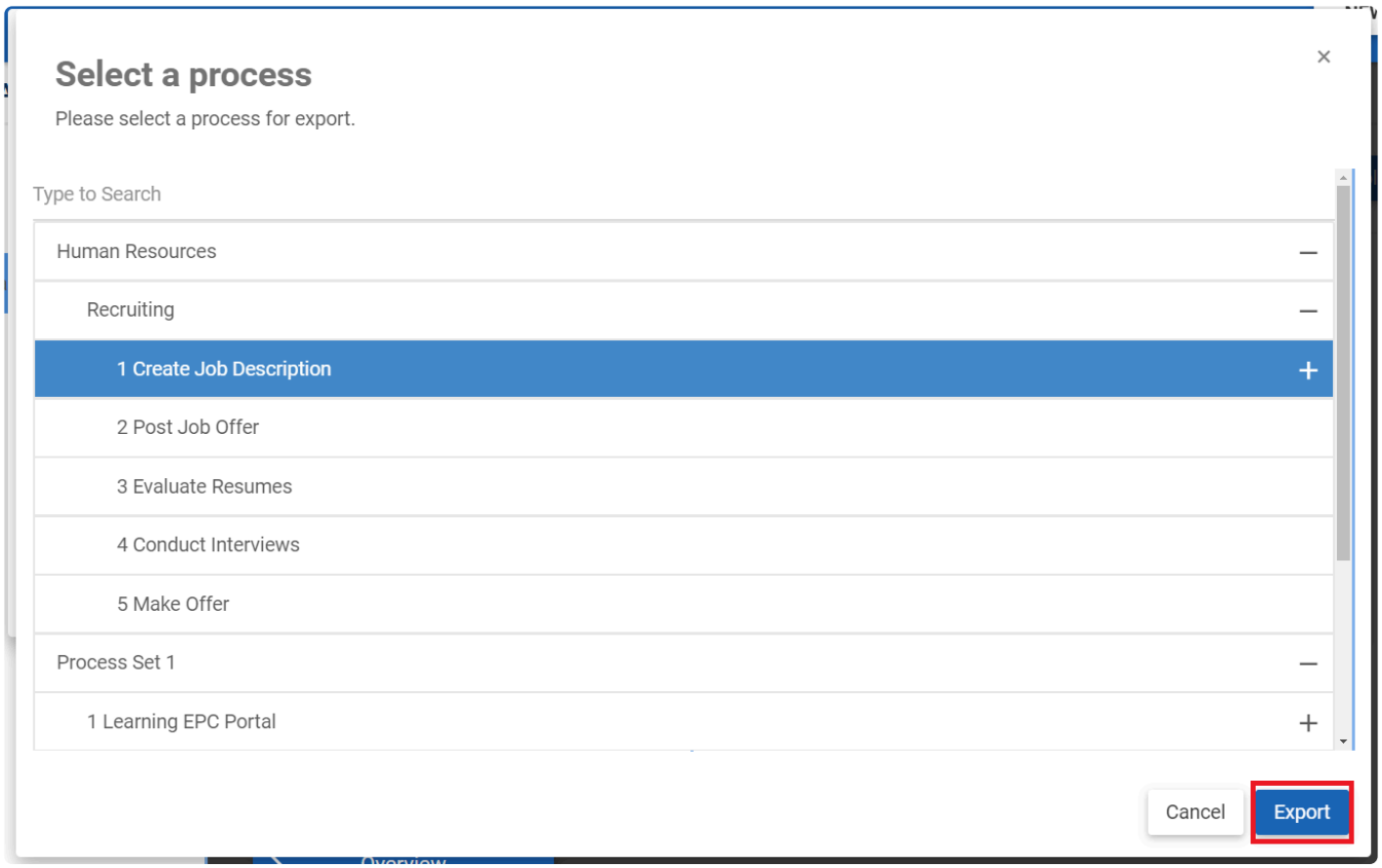


3) Select BPMN (.bpmn)

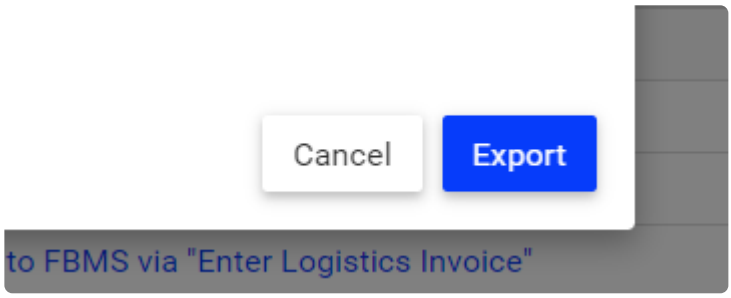
4) Type to search for the process you wish to export, or search by hierarchy. Click to select it among the results list.



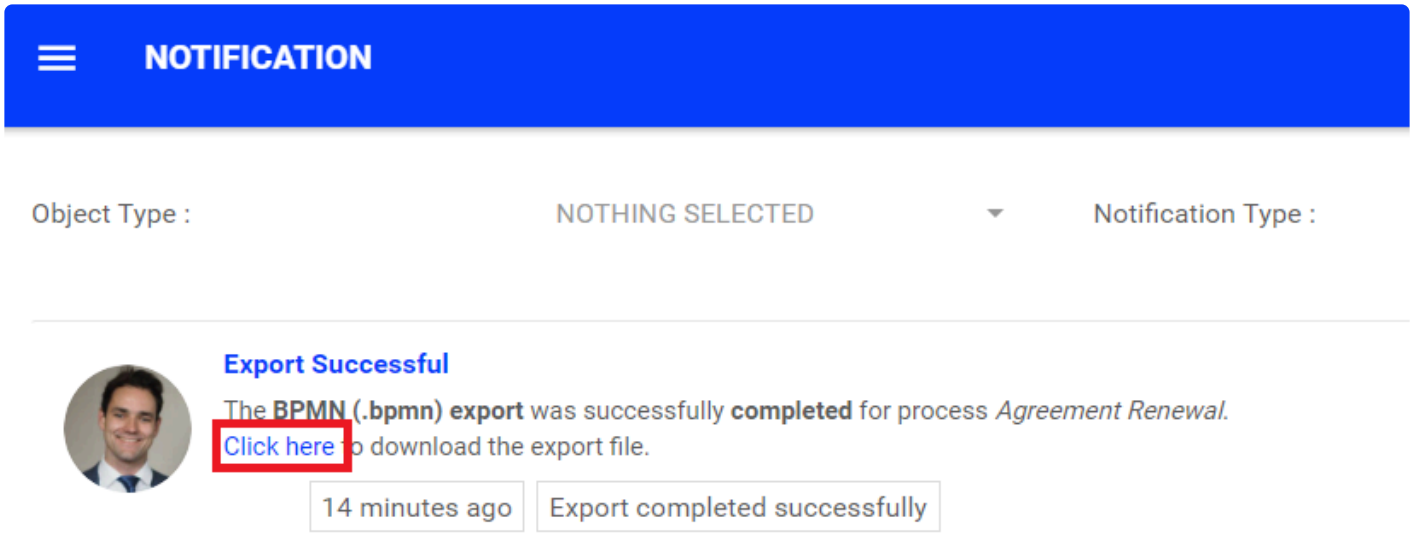
5) If you are searching by hierarchy, select the process you wish to export, then click Export. The window will close and you will be brought back to the intial export page.



6) Click “Export”



Note that the export will run in the background until the export file is ready. Once the file is ready, you will receive a notification providing you with a download link.

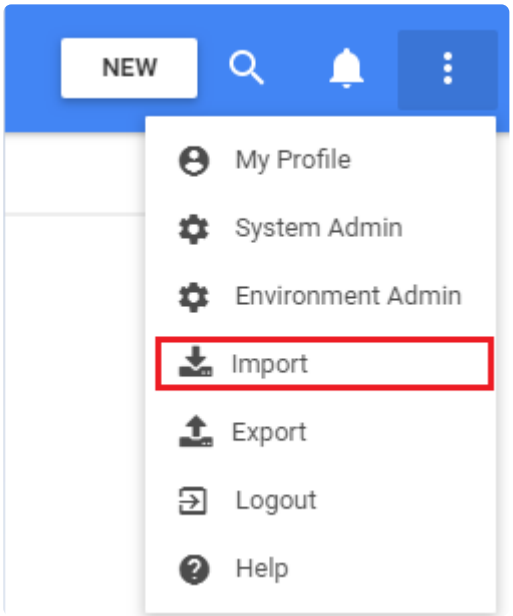

NOTIFICATION
Object Type :
NOTHING SELECTED
Notification Type :
Export Successful
The BPMN (.bpmn) export was successfully completed for process Agreement Renewal.
Click here to download the export file.
14 minutes ago
Export completed successfully

12.1.4.4 Import Master Data Content

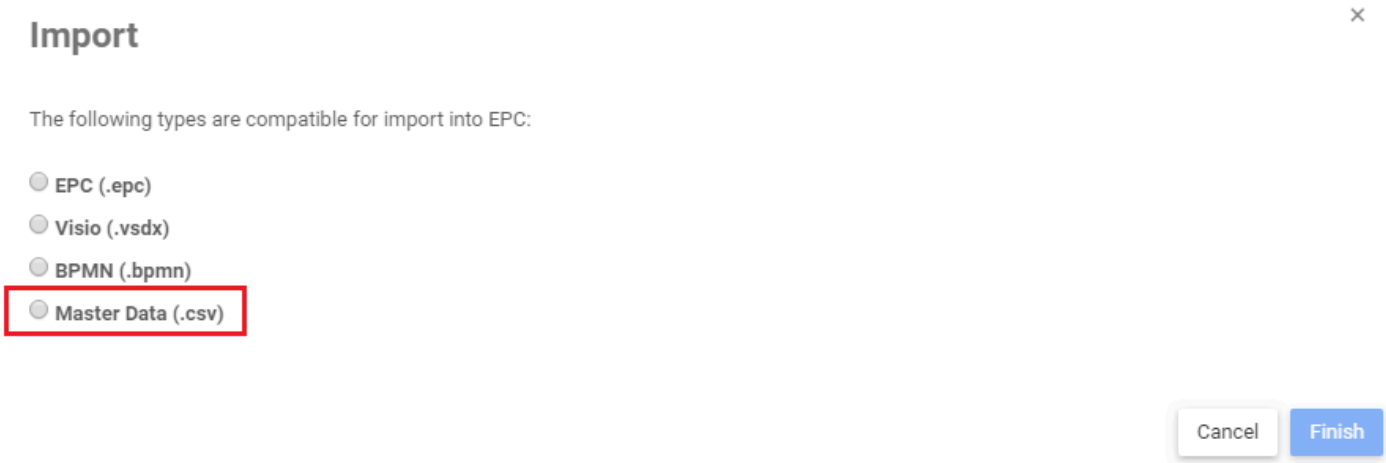
Environment and System Administrators can import a database structure from a system's DBMS using a .csv file.

Follow the steps below to import data from an outside EPC environment. The format of the data file you wish to import must be .csv and correctly formatted for the import. See 12.1.4.4.1 CSV File Format for the format requirements.

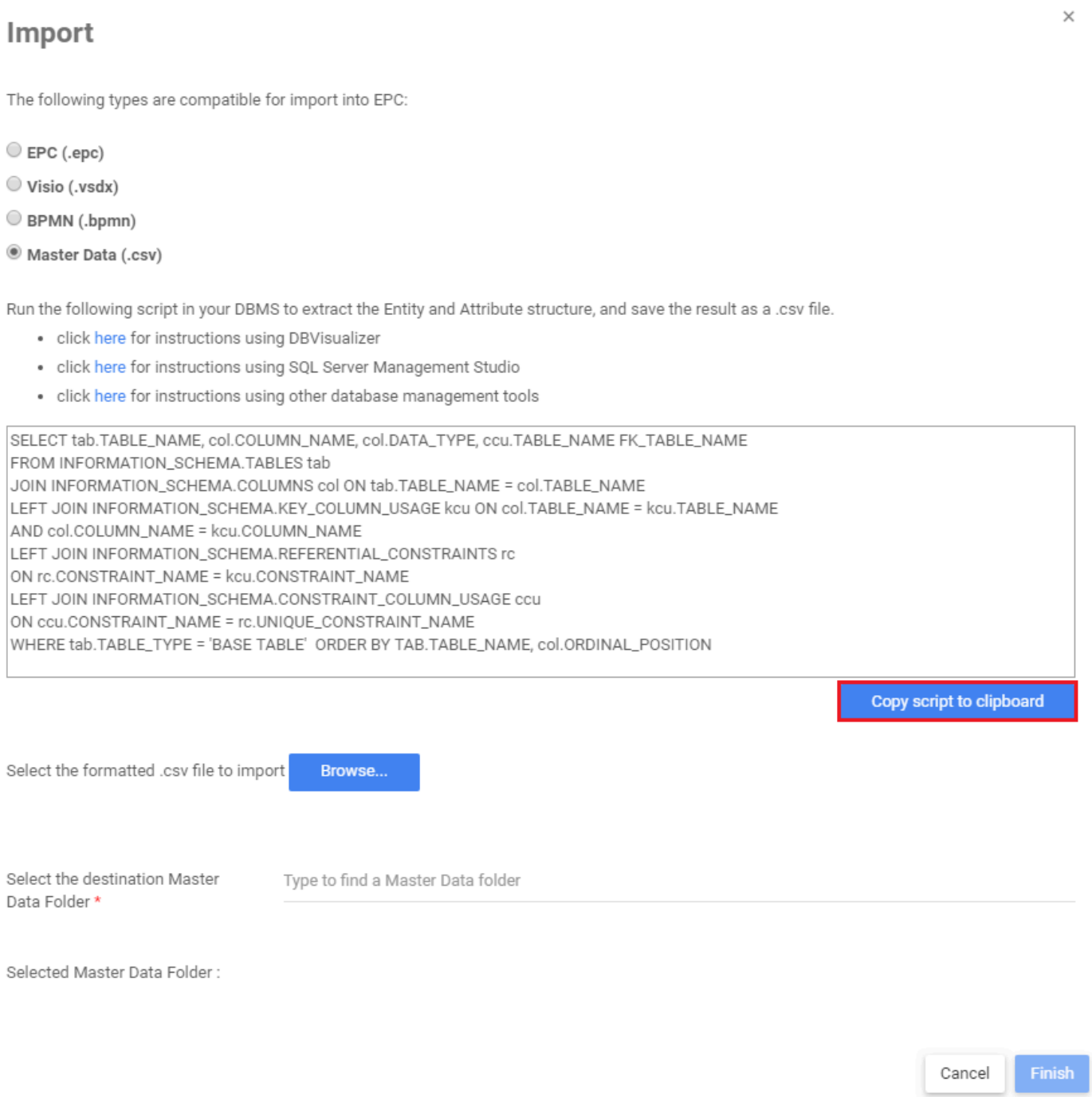
1. From the WebApp Toolbar, select the three dots > Import



2. Select Master Data (.csv)



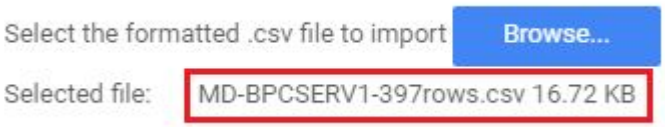
3. The import Wizard will appear below. Click the Copy Script to Clipboard button to copy the script.



4. Run the copied script on your DBMS and save the result as a .csv file. For instructions on how to save your DBMS structure in SQL Server Management Studio or DBVisualizer, see below.

- 12.1.4.4.2 Using SQL Server Management Studio
- 12.1.4.4.3 Using DBVisualizer

5. Click on Browse to select the formatted .csv file you wish to import



6. Type in the **Select the destination Master Data Folder** field to find a Master Data Folder. Click on the folder to set the Destination.

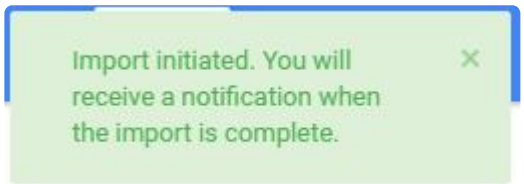
7. The Master Data Folder to which the .csv will be imported to will appear below

8. You can select the Publish checkbox if you wish to publish all objects when the import finishes

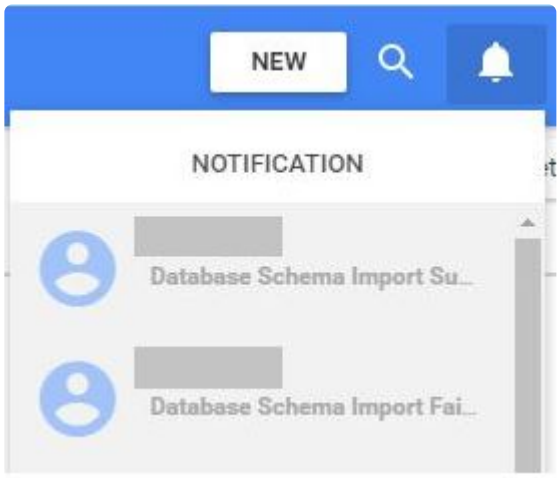
> NOTE: The Publish checkbox is only available in Show Latest mode.

9. Click on Finish

10. you will see a popup when the import starts



11. You will receive a notification when the import has finished whether it is successful or not.


NEW
NOTIFICATION
Database Schema Import Su...
Database Schema Import Fai...

12.1.4.4.1 CSV File Format

The CSV File must respect these following rules:

(1) The .csv file should not contain the headers TABLE_NAME, COLUMN_NAME, DATA_TYPE, and FK_TABLE_NAME.
(2) The values will be in the following order for each row: TABLE_NAME, COLUMN_NAME, DATA_TYPE and FK_TABLE_NAME.
(3) The values will be separated by a comma “,”.
(4) All “Null” values will appear in the file as “NULL”

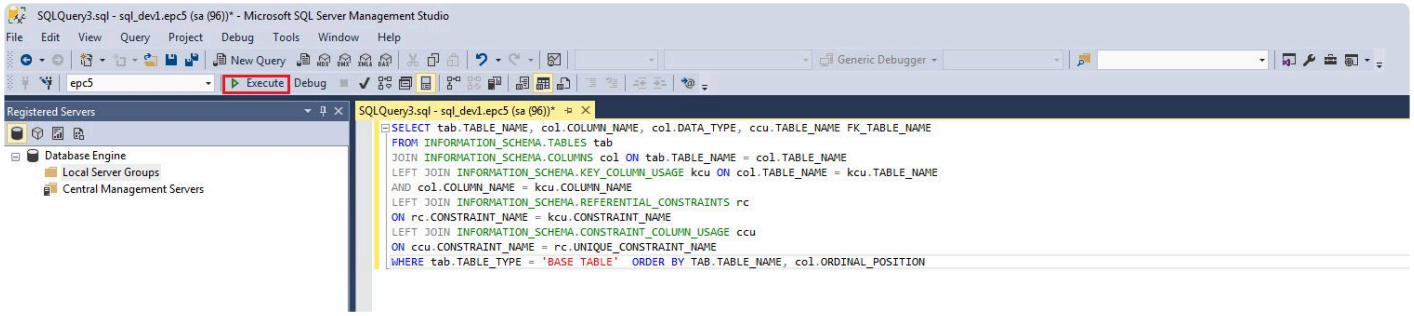
	A	B	C	D
1	H_DB_JOB	DB_JOB_ID	int	NULL
2	H_DB_JOB	DB_JOB_TYPE	char	NULL
3	H_DB_JOB	DB_JOB_NAME	varchar	NULL
4	H_DB_JOB	DB_JOB_COMMENTS	varchar	NULL
5	H_DB_JOB	CLIENT_NAME	varchar	NULL
6	H_DB_JOB	LANGUAGE_CODE	char	NULL
7	H_DB_JOB	DB_VERSION_ID	int	H_DB_VERSION
8	H_DB_JOB	PARENT_DB_JOB_ID	int	H_DB_JOB
9	H_DB_JOB	START_TIME	datetime	NULL
10	H_DB_JOB	END_TIME	datetime	NULL
11	H_DB_JOB	SUCCESS_P	tinyint	NULL
12	H_DB_JOB	ERROR_MESSAGE	varchar	NULL
13	H_DB_VERSION	DB_VERSION_ID	int	NULL
14	H_DB_VERSION	DB_VERSION_NAME	varchar	NULL
15	H_DB_VERSION	DB_VERSION_COMM	varchar	NULL
16	H_DB_VERSION	CLIENT_NAME	varchar	NULL
17	H_DB_VERSION	LANGUAGE_CODE	char	NULL
18	H_DB_VERSION	FORMER_DB_P	tinyint	NULL
19	H_DB_VERSION	DB_RESET_P	tinyint	NULL
20	H_DB_VERSION	DB_UPGRADE_P	tinyint	NULL
21	H_DB_VERSION	DB_TRANSLATE_P	tinyint	NULL
22	H_EPC_RELEASE	EPC_RELEASE_ID	int	NULL
23	H_EPC_RELEASE	EPC_RELEASE_CODE	varchar	NULL
24	H_EPC_RELEASE	EPC_BUILD	numeric	NULL

© 2020 Interfacing Technologies Corporation

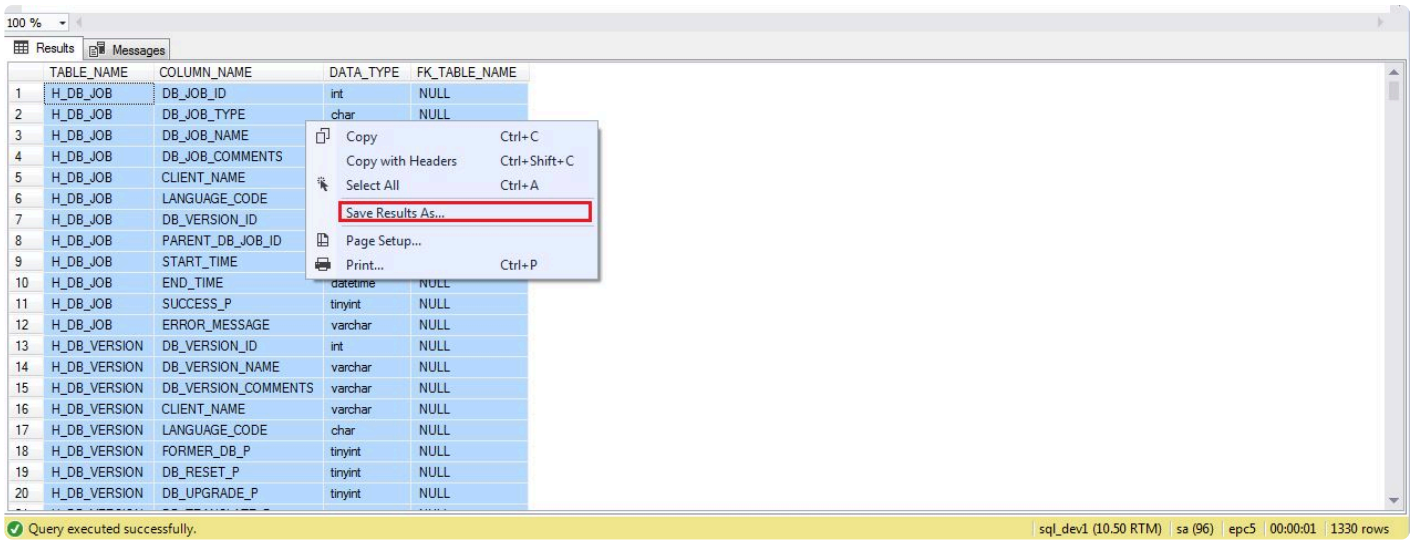
12.1.4.4.2 Using SQL Server Management Studio

To save your data in a .CSV file in SQL Server Management Studio,

1. Run the script in SQL Server Management Studio

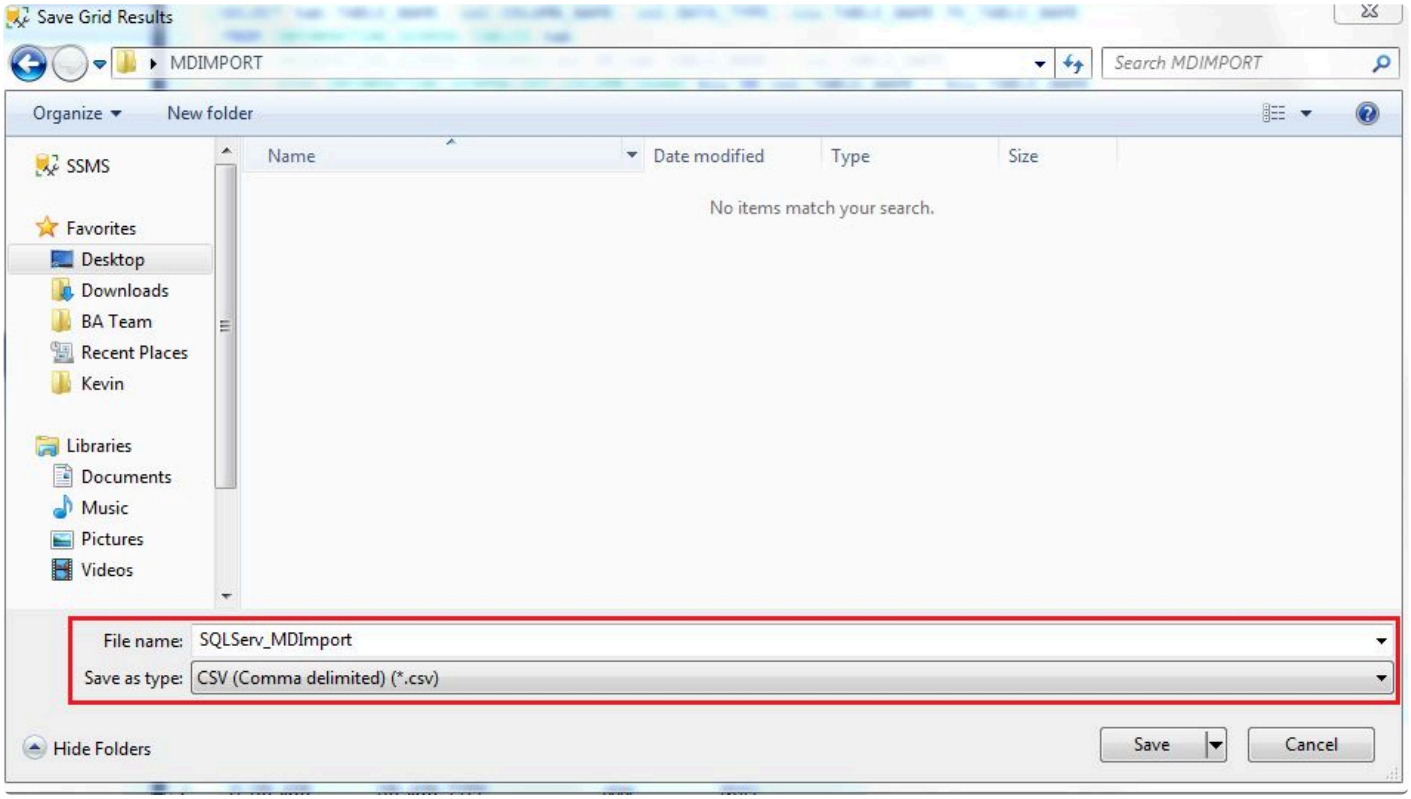


2. In the Results tab, right-click and select Save Results As…



3. Select CSV in the Save as type list

4. Enter the file name

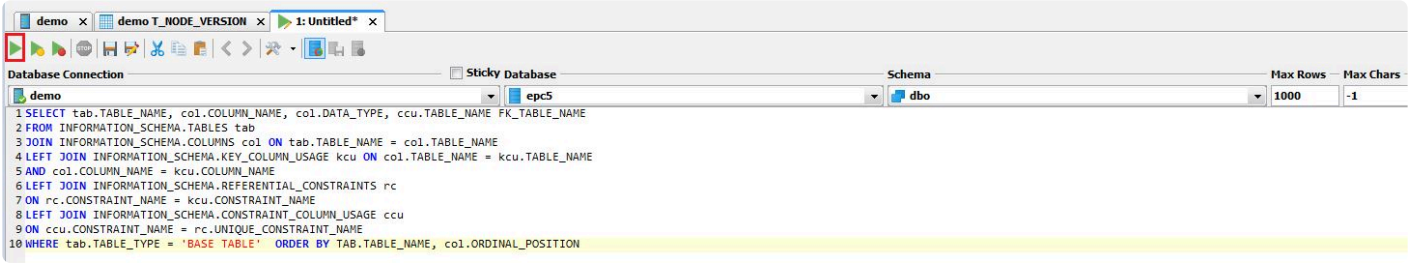


5. Click Save. The exported csv file will be in the specified path.

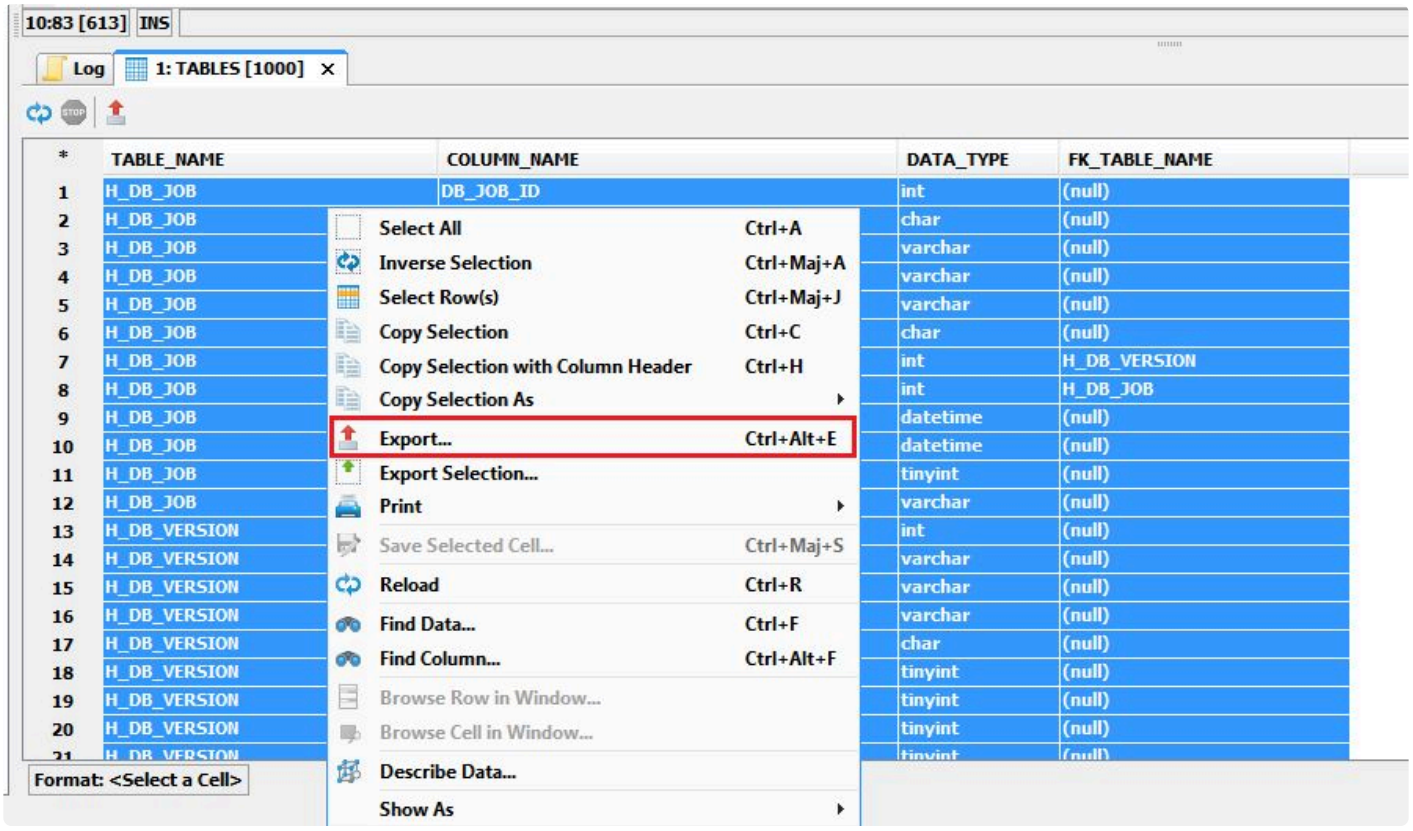
12.1.4.4.3 Using DBVisualizer

To save your data as a .CSV file in DbVizualizer,

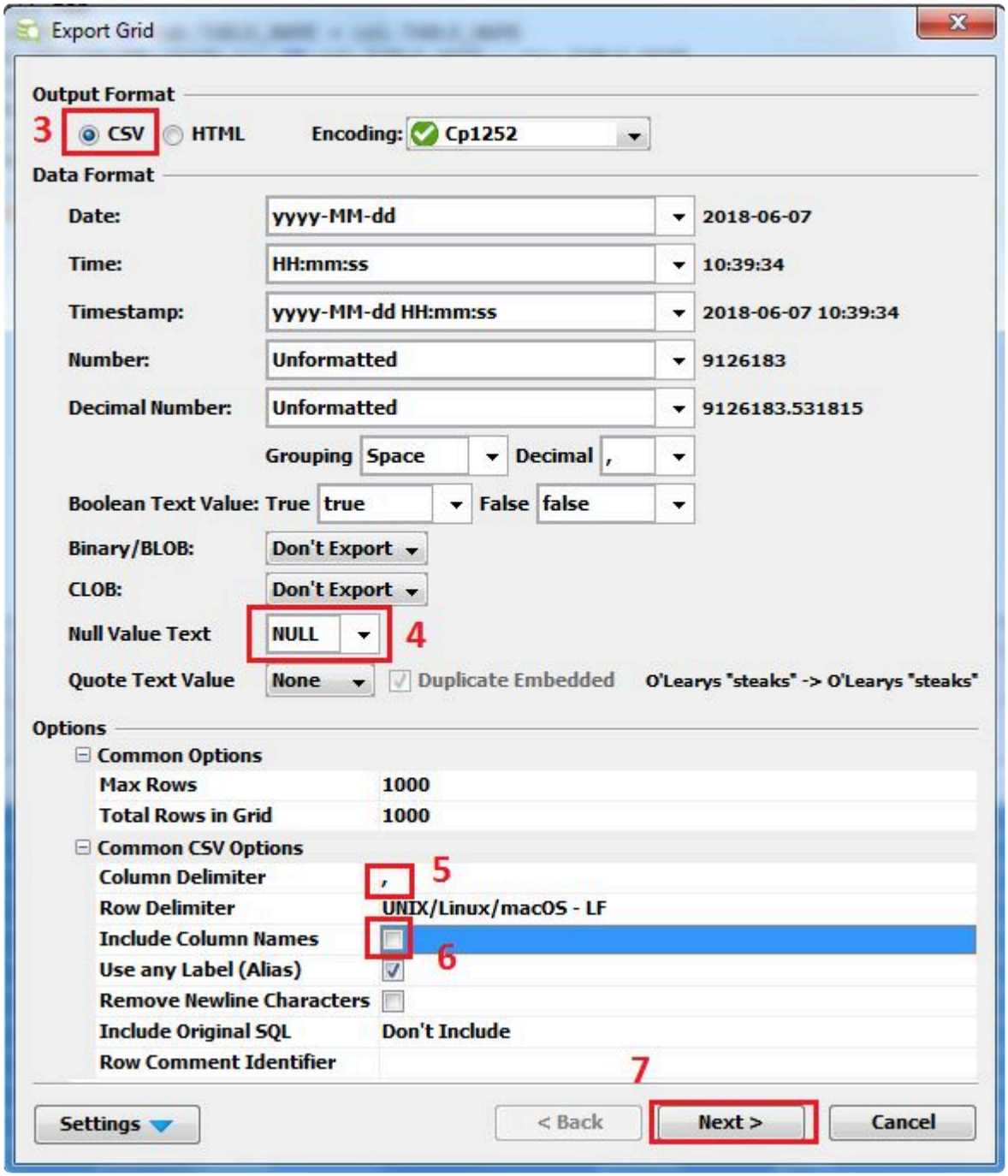
1. Execute the copied script



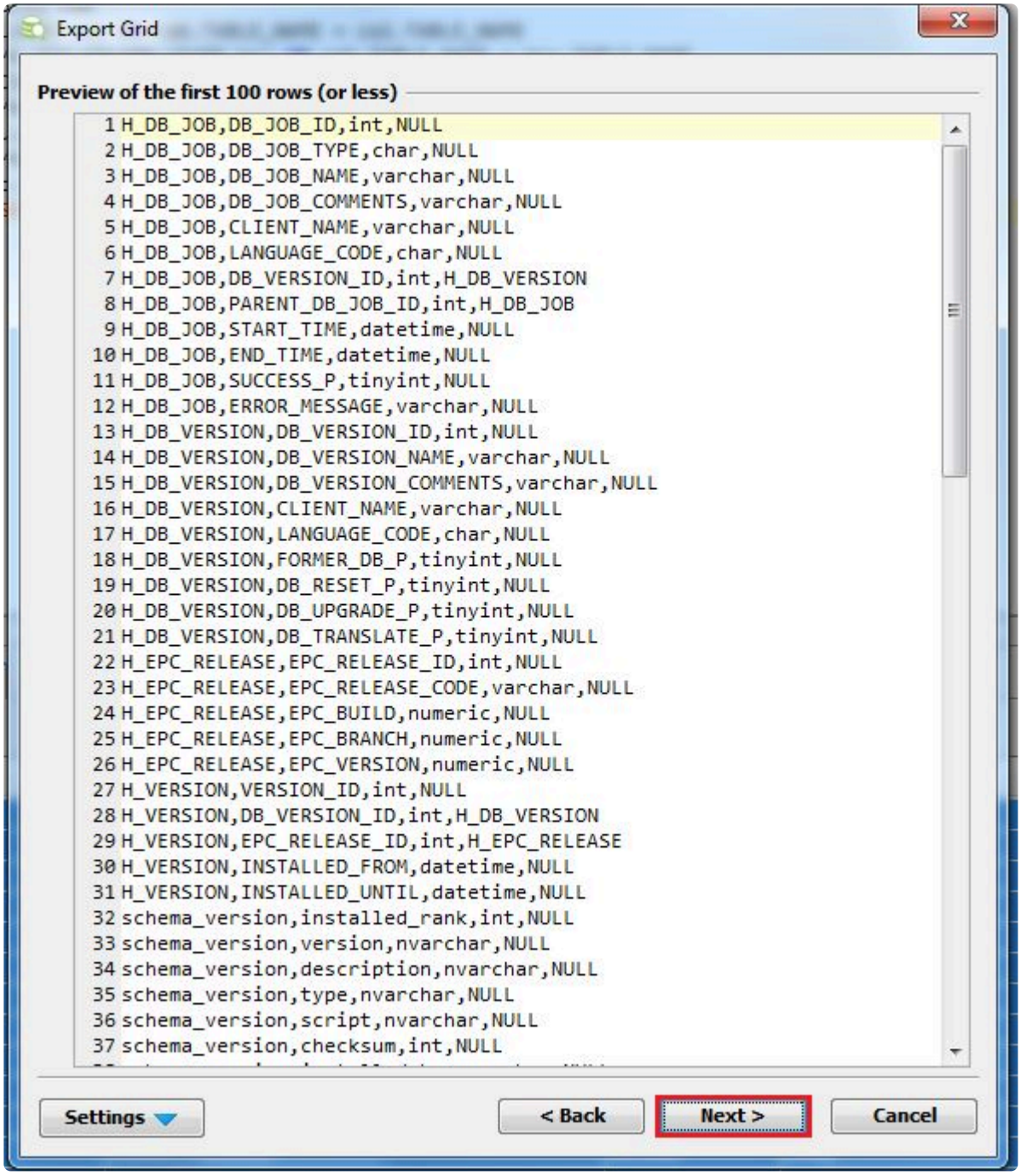
2. In the results tab, right-click and select Export…



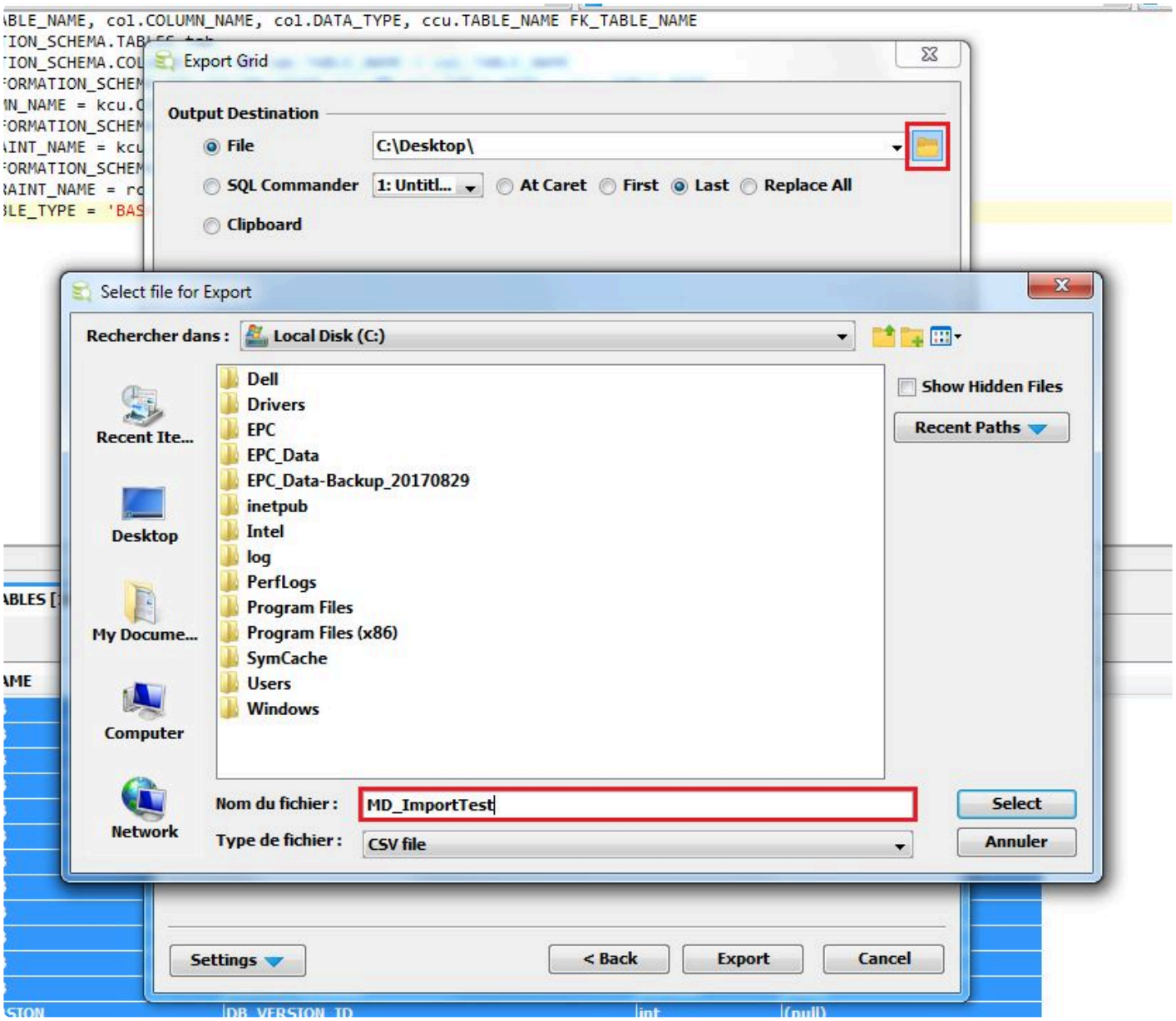
3. Select CSV in Output Format
4. In Data Format section, change the Null Value to NULL
5. In the Options section, change the Column Delimiter to ,
6. In the Options section, unselect Include Column Header
7. Click Next



9. In the Preview page, click Next



10. In the Output Destination, select File and enter a filename. Click on Select after typing the in the filename.



11. Click Export. The .csv file will be saved to the specified path

12.1.4.5 Import/Export Excel Content

Environment Administrators can import Excel (.xlsx files) data into their EPC environment.

Environment Administrators can also export EPC objects to Excel (.xlsx files).

Furthermore, EPC differentiates Environment and System UDAs during the Import or Export process. This allows users to choose which attributes to export. Also, EPC does all the work by differentiating Environment and System UDAs when importing .xlsx files. For more information, click here for Excel import and click here for Excel export.

12.1.4.5.1 Import Excel Content

Environment Admins can import content into the EPC from an Excel spreadsheet. This feature is useful to quickly create or override EPC content coming from an older version supporting the Modeler (versions 11.2 and older) or to quickly insert new content into an EPC environment.

- 12.1.4.5.1 Import Excel – Overwrite
- 12.1.4.5.2 Troubleshooting an Excel Import
- 12.1.4.5.3 Excel Spreadsheet Format

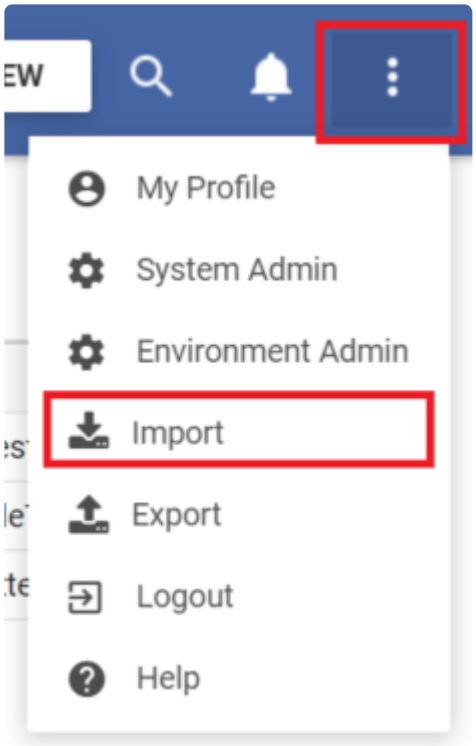
NOTE: to prepare an excel sheet for import, refer to the section on spreadsheet formatting

Excel Importation

https://www.youtube.com/embed/cf8yF7EyKD8?rel=0

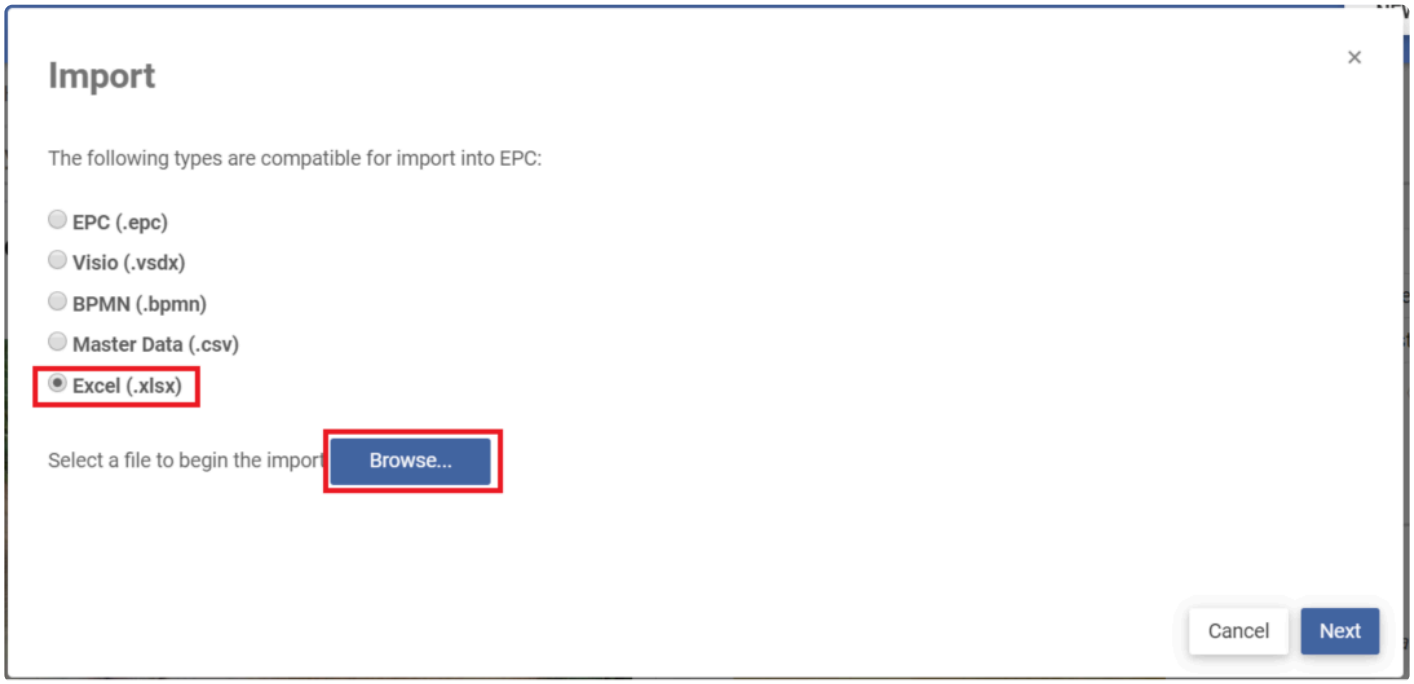
To import an Excel file, follow the steps below:

1. Within the EPC menu (located on the top right corner), click on **Import**



2. In the import window, select **Excel (.xlsx)** and upload the Excel file

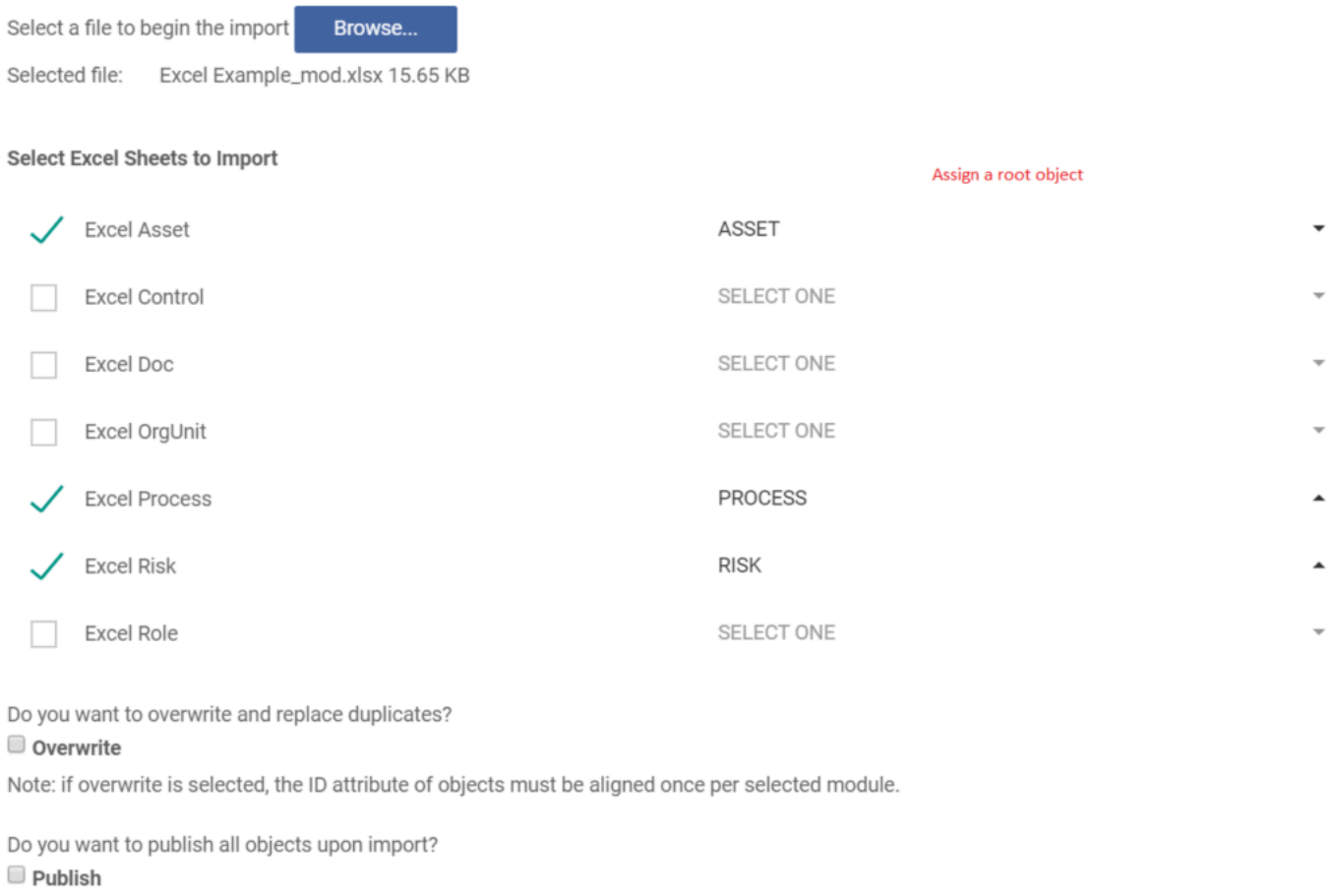
> The file format must be in .xlsx



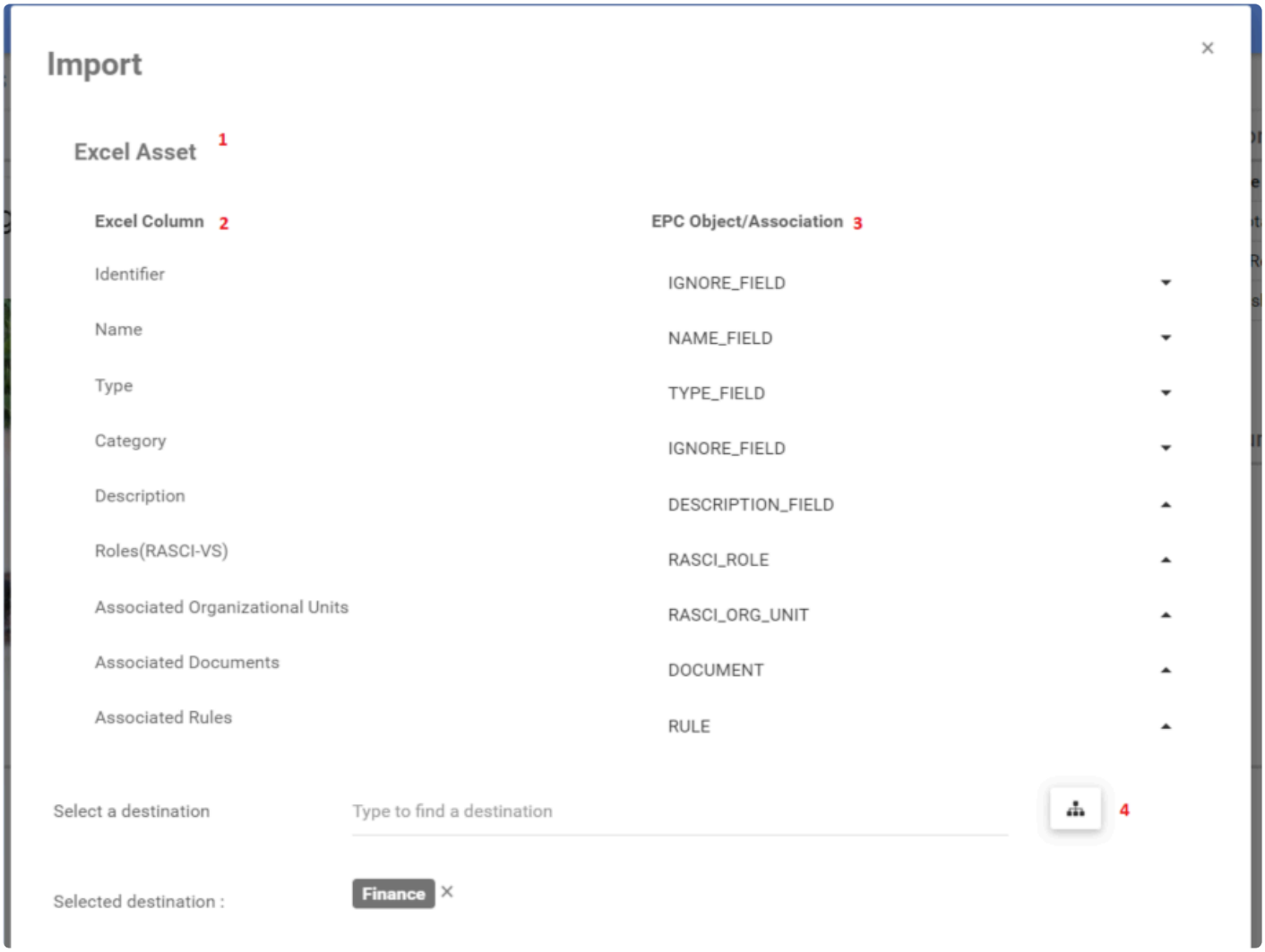
3. Once you have uploaded your file, you will be prompted to select which sheets in the Excel file you wish to import. After selecting a sheet, assign a root object in the adjoining dropdown list. Indicate if you would like to overwrite content and publish upon import. Click on **Next**.

- **Overwrite content**: If selected, objects being imported and objects being overwritten will need to have an identifier defined. Imported objects will overwrite existing objects in the EPC if an identifier is matched. Refer to the section on overwriting in Excel import for more information.
- **Publish upon import**: If selected, all imported objects will be automatically published when the import is done.

Each Excel sheet should correspond to an object type in EPC (process, rule, control, etc.)

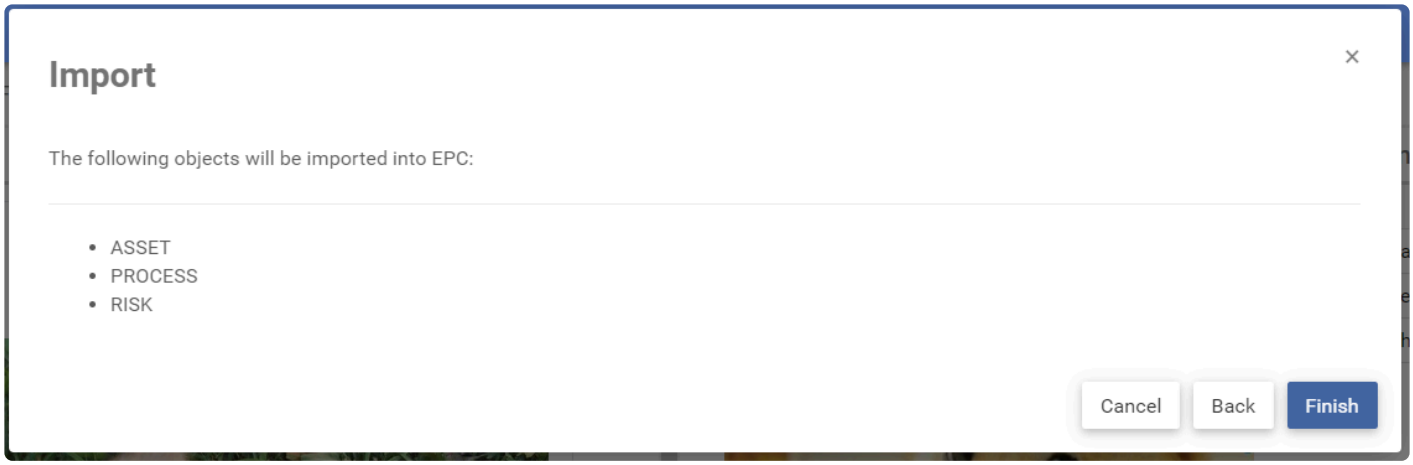


4. Manually align the imported Excel column headers with EPC's object/associations and attributes for each sheet you have selected in the previous section. If you wish to skip the import of a column, select "Ignore" from the EPC Attribute drop down list. Click Next when you are done.

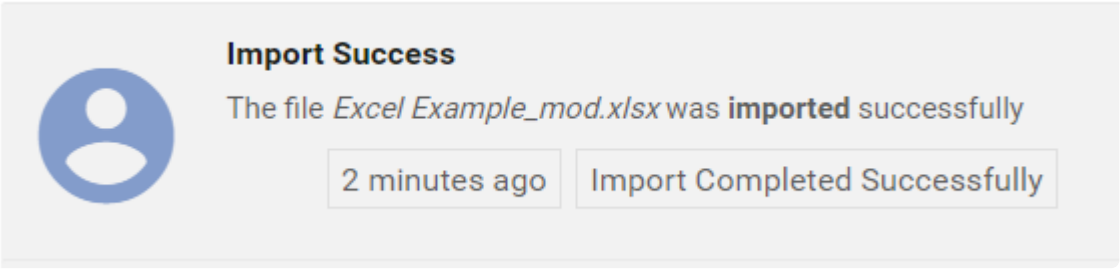


1. **Excel Sheet**: The name of the Excel sheet that was selected to import
2. **Excel Column**: The column headers in the Excel sheet that was selected to import
3. **EPC Object/Association**: The attribute that will be imported based on the content of the Excel column. Note that RASCI-VS or CRUD associations will be prefixed by [RASCI] or [CRUD]. Associations will simply be shown as an object type; [DOCUMENT], [RULE] are documents and rules associated to the object.
4. **Destination**: You may select a destination to import your Excel sheet in. If you do not select a destination, a set will be automatically created.

5. Review the import summary and click on **Finish**



6. You will receive an import notification once it is complete.



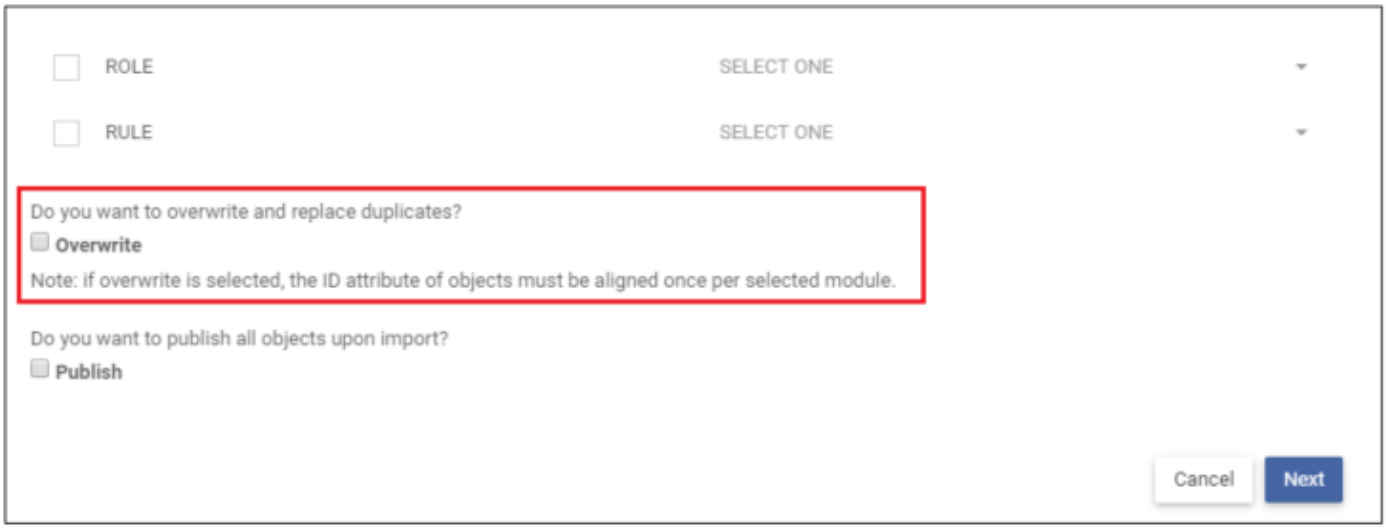
Users can import UDA attributes and their content into a Microsoft excel.
The UDA's that are compatible with importing are Currency, Duration, Dropdown – Multi-Select, Drop-down – Single Select, Number, Simple Text, Rich Text.

Ensure that the UDA's value in the excel file is matching with the UDA's value in the system.

12.1.4.5.1.1 Import Excel – Overwrite

In the Import from Excel Wizard, the option to overwrite can be selected so that modifications made in the Excel spreadsheet file may be imported back into EPC without creating duplicates. The table below describes overwrite scenarios for both the import of object and associated object identifiers.

> NOTE1: If you wish to overwrite with imported data, the identifier EPC Attribute must be aligned once per selected module in the Align Columns section.
> NOTE2: In order to be overwritten, duplicate EPC objects must have the same Identifier.



	Identifier Status	Outcome
Override selected	Identifier is matched (existing ID In EPC)	Object is overwritten, associated object is linked
	Identifier is not matched (no existing ID in EPC)	New object/associated object is created while keeping the identifier in the excel
	No Identifier listed	New object/associated object is created and an identifier is generated
Overrise not selected	Identifier is matched (existing ID In EPC)	An error will occur; overwrite must be selected
	Identifier is not matched (no existing ID in EPC)	New object/associated object is created while keeping the identifier in the excel
	No Identifier listed	New object/associated object is created and an identifier is generated

12.1.4.5.1.2 Troubleshooting an Excel Import

Both the imported Excel file and the Importing process are validated against inconsistencies and errors. When at least one error is found, the import validation fails and an error report is presented so that the problems can be rectified. Below are the error messages related to issues that could cause problems with your import.

General

Unsupported File Type
EPC only supports the import of .xlsx type Excel files.

Document Format: SOP
While SOP type documents may be exported, they cannot be re-imported using the Import from Excel Wizard. To import these files, first export them to a .epc file then re-import the epc file in the environment.

Excel file issues

Multiple objects in the file with [identifier] for the object [object name].
Multiple identifiers exist within the specified sheets in the imported Excel file. Find the duplicate identifiers and either delete them or modify them (be sure to mirror these changes in the EPC if you wish to overwrite imported data).

The [name] field must not be empty for the object [object name].
Name values cannot be empty. Refer to the cell addresses and assign them a name.

The [object name] identifier must not exceed [number] characters.
There are two identifier character limits in EPC:

- Process identifiers have a character limit of 36
- All other EPC object identifiers have a character limit of 255

Make sure to refer to the cell addresses and modify them accordingly.

The relationship [relationship name] identifier must not exceed [number] characters.
EPC object identifiers must not exceed 255 characters. Refer to the cell addresses and modify them accordingly.

The [object name] [name] must not exceed [number] characters.
There are two name character limits in EPC:

- Resource first, middle, and last names have a character limit of 84
- All other EPC object names have a character limit of 450

Make sure to refer to the cell addresses and modify them accordingly.

The relationship [relationship name] must not exceed [number] characters.
The same name character limits apply to associations as well (see above). Refer to the cell addresses and modify them accordingly.

Invalid URL
The cell contains an invalid URL. The valid formats are:

- http://
- https://
- ftp://

Refer to the cell addresses and modify them accordingly.

Invalid path
The cell contains an invalid file link path. The valid formats are:

- file:/
- file:// (for shared network files)

Refer to the cell addresses and modify them accordingly.

This row has both an empty URL and file link value but only one field can be empty.
Both the URL and file link values for that row are empty. Either one must contain a non-empty value.

This cell has an empty [URL/file link] field.
If only one of either the URL or file link attribute was aligned in the Align Columns section, the value cannot be empty.

A document has either a file link or a URL value, not both.
If both URL and file link attributes were aligned in the Align Columns section, only one value can be empty.

- is not a [frequency] type.*
  The frequency type found in the affected cell address is not recognized as an EPC frequency type. Modify the appropriate cells and try the import again.

The date is of an invalid format. The format should be YYYY-MM-DD.
The date value found in the affected cell address is not recognized as a valid date format. The accepted date format is: YYYY-MM-DD. The following fields adhere to the aforementioned format:

The format of [time value attribute] is wrong. The format should be 0 00:00:00.
The time value found in the affected cell address is not recognized as a valid time format. The accepted time format is: 0 00:00:00. Modify the appropriate cells and try the import again.

The value for [impact or likelihood value] must be between 1 and 5 for the object [object name]
The impact or likelihood value found is not recognized as an integer between 1 and 5. The columns which require fields to adhere to the aforementioned format are:

- Gross Risk Impact
- Gross Risk Likelihood
- Gross Risk Detectability
- Residual Risk Impact
- Residual Risk Likelihood
- Residual Risk Detectability

  Modify the appropriate information and try the import again.

Cannot import [residual impact or likelihood value] when the attribute [Override residual risk auto-calculation] is not selected; [Override residual risk auto-calculation] must have value X in the same row.
In order to import residual risk impact or likelihood values, the value for the adjoining field under the column “Override residual risk auto-calculation” must be “X”. Additionally the aforementioned column must be aligned during the Align Columns step. Modify the appropriate information and try the import again.

The value for [control or risk value] is not recognized for the attribute [control or risk attribute].
The value found is not recognized as a control or risk attribute.

> **NOTE**: A legend containing abbreviation information is found on a separate sheet when control or risk data are exported to an Excel spreadsheet file.

When the attribute [control attribute] is aligned, the attribute [control attribute] must have value X for the object [object name].
Certain columns require a true value (denoted by a value of “X”) in the adjoining cells in order to be imported successfully. The special requirements are:

- If the “Control Activity Type” column is aligned in the Align Columns section of wizard, then the “Control Activities” cell must have a true (X) value.
- If the “IT Assertions” and/or “IT Control Type” column is aligned, then the “IT Control” cell must have a true value (X).
- If the “Valuation & Allocation Attributes” column is aligned, then the “Valuation & Allocation” cell must have a true (X) value.

Excel Import Process

Section: Select Sheets

You must select at least one sheet.

At least one sheet must be selected.

You must select a root object when you select a sheet.
When a sheet is selected, a root object must be assigned.

You can only select the following root object(s) once.
The root objects can only be assigned once in this section.

Section: Align Columns

You can only assign each EPC Attribute once per object for the following sheet(s):
The EPC attributes can only be aligned once per selected object.

You cannot just select associations for the object [object name].
In order to import associations, the root object (from the EPC Object/Association drop down list) and its identifier attribute (from the EPC Attribute drop down list) must also be aligned.

When you overwrite, you must align the identifier column for the object [object name].
If the option to overwrite was selected, the identifier attribute must be aligned once per selected module in this section.

You must align the Name column for the object [object name].
The name attribute must be aligned once per selected module during the Align Columns section.

You must select a column for file link or URL for the object [object name].
Either the URL or file link attribute must be aligned if the document root object was selected.

When the attribute [control attribute] is aligned, the attribute [control attribute] must also be aligned for the object [object name]
Certain columns are interdependent and must be aligned together in the Align Columns step for a successful import of the respective data. The required alignments are:

- If “Control Activity Type” is aligned, then “Control Activities” must also be aligned.
- If “IT Assertions” and/or “IT Control Type” is aligned, then “IT Control” must also be aligned.
- If “Valuation & Allocation Attributes” is aligned, then “Valuation & Allocation” must also be aligned.

Server side

Server side issues usually occur during the import, such as an error creating an set, object due to different reasons. In this case you will have an import failure notification. Please contact your administrator.

12.1.4.5.1.3 Excel Spreadsheet Format

In order to succesfully import data in an Excel spreadsheet to the EPC, it is recommended to follow a specific format if you are creating an excel spreadsheet

> **NOTE**: If you are exporting an Excel file from the Modeler (versions 11.2 and older of EPC), you do not need to modify the excel spreadsheet.

To facilitate ease of use and organization, each EPC object is separated by sheet. Each of these sheets is composed of three sections (all sections are on one row). The images in this section are taken from an Excel file with Process information and its associations.

1. Object Details
2. RASCI-VS and/or CRUD associations
3. Associated objects

Object Details

The object details describe the basic attributes of the object. The number of attributes may vary depending on the object, but all object have a minimum of 5 attributes. These are:

- **Identifier**: The unique identifier of the object
- **Name**: The name of the object
- **Type**: The type of the object. You can find type next to the identifier in EPC.
- **Category**: The category of the object. you can find the category below the identifier in EPC
- **Description**: The description of the object

This section of the Excel spreadsheet should look like the image below:

Identifier	Name	Type	Category	Description
DHR-001	Develop human resources strategy	Management	Value Added	Strategic Objectives: - Attract and retain employees - Develop leadership training and promoting external development opportunities - Promote a motivated and diverse workforce

Some EPC Objects have specific attributes that are not found in other objects. These objects are:

- Documents
- Controls
- Process
- Flow Object
- Risks

All other objects (entities, attributes, indicators, objectives, assets, roles and org units) only have the basic 5 object detail attributes outlined in this section.

RASCI-VS Associations

The three objects in EPC that can be imported and assigned a RASCI-VS value are

- Roles
- Assets
- Organization Units

> Multiple associations can be listed in each cell of the RASCI-VS association column separated by a pipe "|".

The format of the association should be as following: **Name (R,A,Su,C,I,V,Si) [Identifier]**, where

- Name: The name of the associated roles, asset or organizational unit
- (R,A,Su,C,I,V,Si): The RASCI-VS value of the associated object. Multiple assignment is denoted by a comma.
- Identifier: The unique identifier of the associated object.

This section of the Excel spreadsheet should look like the image below:

Roles (RASCI-VS)	Assets (RASCI-VS)	Organization (RASCI-VS)
Human Resources Supervisor (Su,I) [REF-HR-0204]	Peoplesoft (Su) [REF-AT-0453]	Interfacing Technologies Corp. (A) [REF-EXO-0252]

CRUD Associations

There are 3 CRUD associations that can be imported using Excel:

- Roles
- Entities
- Attributes

> Multiple associations can be listed within each cell of the CRUD association columns by separating them with a pipe "|".

The CRUD association format should as follows: **Name (C,R,U,D) [Identifier]**, where:

- Name: The name of the role, entity or attribute that is associated
- C,R,U,D: The access rights of the object. Multiple assignment is denoted by a comma.
- Identifier: The unique identifier of the associated object.

This section of the Excel spreadsheet should look like the image below:

Roles (CRUD)
Assistant HR Manager (C,U) [REF-HR-0203] | HR Manager (C,D) [REF-HR-0204)

Associated Objects

The associations to an object can be listed within the cells of the associated object columns. The number of columns is dependent on the type of object.

The format for the associated object is as follows: **Name [Identifier]** where:

- Name: Name of the object that is associated
- Identifier: Identifier of the associated object

NOTE: Multiple associated objects can be listed within each cell by separating them with a pipe "|"

This section of the Excel spreadsheet should look like the image below:

Associated Documents	Associated Controls	Associated Rules
Strategic Workforce Planning Guide [REF-HRD-141] | Teaming up with Success (Agenda) [REF-HRD-512]	Management and Search Committee Audit Review [REF-HRC-5123]	Section R.201.14 "Capabilities and work functions of supervisors must be reviewed bi-annually and set for approval [REF-HRR-5253]

12.1.4.5.1.3.1 Object Details – Document

The object details specific to documents are (including the basic object details):

- **Identifier**: An identifier that is unique to each module. Please note that the character limit for this field is 255 characters.
- **Name**: The name of the document. Please note that the character limit of this field is 450 characters.
- **Type**: The type of the document.
- **Category**: The category of the document.
- **Description**: The description of the document.
- **URL**: The URL path of the document. For more information on the valid URL formats, please see the Excel file issues section
- **File Link**: The file link path of the document. For more information on the valid file link formats, please see the Excel file issues section
- **Document Format**:The document formats are: file, file link, URL, and SOP.

12.1.4.5.1.3.2 Object Details – Control

NOTE: A legend containing the following information is found on a separate sheet when control data are exported to an Excel spreadsheet file.

The object details specific to the EPC object *document* are (including the basic object details):

- **Identifier**: An identifier that is unique to each module. Please note that the character limit for this field is 255 characters.
- **Name**: The name of the control. Please note that the character limit of this field is 450 characters.
- **Type**: The type of the control.
- **Category**: The category of the control.
- **Description**: The description of the control.
- **COSO Component**: The COSO components associated with the control. Multiple attributes are separated by a pipe (|). The legend for the abbreviations is:IE: Internal Environment
    - *OS*: Objective Setting
    - *EI*: Event Identification
    - *RA*: Risk Assessment
    - *RR*: Risk Response
    - *IC*: Information & Communication
    - *M*: Monitoring

- **Control Activities**: The activity type state of the control. Cells with a value “X” indicate an existing value in the column “Control Activity Type”. Otherwise, a control without an activity type is represented with a blank value for “Control Activities”.

- **Control Activity Type**: The activity type of the control. Cells in the “Control Activity Type” column can have a type only if the value in the adjoining “Control Activities” field has a value of “X”. The valid control activity types are:
    - Authorization
    - Configuration/Account Mapping
    - Exception/Edit Report
    - Interface/Conversion Controls
    - Key Performance Indicator
    - Management Review
    - Reconciliation

NOTE: If the “Control Activity Type” column is aligned in the Align Columns step, then the “Control Activities” column must also be aligned.

- **Key Control**: The key control state of the control. Cells with a value “X” indicate that the control is a

key control. Otherwise, a non-key control is represented with a blank value for “Key Control”.

- **Preventive/Detective**: The preventive or detective nature of the control. The recognized options are:
  - Preventive
  - Detective
  - Not Applicable
  - (Empty)

- **Manual/Computer**: The manual or computer nature of the control. The recognized options are:Manual
  - Computer
  - Not Applicable
  - (Empty)

- **Frequency**: The frequency of the control. The recognized options are:
  - Transaction
  - Daily
  - Weekly
  - Bimonthly
  - Monthly
  - Quarterly
  - Yearly
  - (Empty)

- **IT Control**: The IT control state of the control. Cells with a value “X” indicate that the control is an IT control. Otherwise, a non-IT control is represented with a blank value for “IT Control”.

- **IT Control Type**: The IT control type of the control. Cells in the “IT Control Type” column can have a type only if the value in the adjoining “IT Control” field has a value of “X”. The valid IT control types are:
  - General
  - Application
  - (Empty)

- **IT Assertions**: The abbreviated IT assertions of the control. Cells in the “IT Assertions” column can have an assertion only if the value in the adjoining “IT Control” field has a value of “X”. Multiple values are separated by a pipe “|”. The assertions and their abbreviations are:
  - C: Completeness
  - AC: Accuracy
  - V: Validity
  - AU: Authorization

NOTE: If the “IT Assertions” and/or “IT Control Type” column is aligned in the Align

Columns step, then the “IT Control” column must also be aligned.

- **Financial Assertions**: The abbreviated financial assertion of the control. Multiple values are separated by a pipe “|”. The financial assertions and their abbreviations are:
  - EO: Existence & Occurrence
  - CO: Completeness
  - RO: Rights & Obligations
  - PD: Presentation & Disclosure

- **Valuation & Allocation**: The valuation and allocation state of the control. Cells with a value “X” indicate an existing value in the column “Valuation & Allocation Attributes”. Otherwise, a control without a valuation and allocation attribute is represented with a blank value for “Valuation & Allocation”.

- **Valuation & Allocation Attributes**: The valuation and allocation attributes of the control. Cells in the “Valuation & Allocation Attributes” column can have an attribute only if the value in the adjoining “Control Activities” field has a value of “X”. Multiple values are separated by a pipe “|”. The valid control activity attributes are:
  - *A*: Accuracy
  - *CL*: Classification
  - *TC*: Timing or Cut-off
  - *PS*: Posting & Summarization
  - *DT*: Detail Tie-in
  - *RV*: Realizable Value

NOTE: If the “Valuation & Allocation Attributes” column is aligned in the Align Columns step, then the “Valuation & Allocation” column must also be aligned.

- **Financial Statements Impacted**: The financial statements impacted of the control. Multiple values are separated by a pipe “|”. The financial statements and their abbreviations are:
  - *BS*: Balance Sheet
  - *RE*: Retained Earnings
  - *IS*: Income Statement
  - *SCF*: Statement of Cash Flow
  - *NFS*: Notes to Financial Statements

12.1.4.5.1.3.3 Object Details – Process

The object details specific to process are (including the basic object details):

- **Name**: The given name of the process. Note that there is a 450 character limit.
- **Identifier**: The unique identifier of the process. Note that there is a 36 character limit.
- **Type**: The type of the process
- **Category**: The category of the process
- **Description**: The description of the process
- **Sequence Number**: The sequence number of the process
- **Process Parent**: The parent of the process
- **Process Goal**: The goal of the process
- **Value Added**: Corresponds to Value Added (VA) in the Analysis tab in the Governance module. VA is denoted by an “X” in the cell. *
- **Non Value Added**: Does not correspond to any value in EPC, but if the value type is Value Enabled (VE) or Non Value Added (NVA), this cell must have an “X”. *
- **Waste Necessary**: Corresponds to Value Enabled (VE) in the Analysis tab in the Governance module. VE is denoted by an “X” in the cell. *
    - This cell is dependent on the “Non Value Added” cell.
    - If there is an “X” in this cell, there must be an “X” in the “Non Value Added” cell
- **Waste Not Necessary**: Corresponds to Non Value Added (NVA) in the Analysis tab in the Governance module. NVA is denoted by an “X” in the cell. *
    - This cell is dependent on the “Non Value Added” cell.
    - If there is an “X” in this cell, there must be an “X” in the “Non Value Added” cell
- **Waste Type**: The type of waste. Accepted values are:
    - (empty)
    - Defects
    - Inventory
    - Motion
    - Over-Processing
    - Over-Production
    - Skills
    - Transport
    - Waiting
- **On Critical Path**: If the process is on the critical path, the value in the cell should be denoted by an “X”. If it is not, the cell should be empty.
- **On High Risk Path**: If the process is on the high risk path, the value in the cell should be denoted by an “X”. If it is not, the cell should be empty.
- **Average Actual Time**: Format must be in D HH:MM:SS
- **Average Waiting Time**: Format must be in D HH:MM:SS
- **Average Inventory Time**: Format must be in D HH:MM:SS
- **Average Transport Time**: Format must be in D HH:MM:SS
- **Average Change Over Time**: Format must be in D HH:MM:SS
- **Average Actual Cost**: Format must be numbers followed by decimals separated by a period (0.0)

- **Number of Active Operators**: Format must be an integer
- **Number of Executions**: Format must be an integer
- **Current Maturity Level**: Format must be an integer

See the picture below for possible combination of selections for the value type

Value Added	Non Value Added	Waste Necessary	Waste Not Necessary	Result
X				VA
	X	X		VE
	X		X	NVA

12.1.4.5.1.3.4 Object Details – Flow Object

The object details specific to process are (including the basic object details):

> Some basic details will appear under a different name for Flow Objects (description as Flow Object Procedure)

- **Name**: The given name of the process. Note that there is a 450 character limit.
- **Identifier**: The unique identifier of the process. Note that there is a 36 character limit.
- **Type**: The type of the flow object
- **Sequence Number**: The sequence number of the object
- **Flow Object Process**: The parent of the flow object. Format must be Name [Identifier]
- **BPMN Shape**: The type of the flow object. Accepted values are:
  - Task
  - Start
  - End
  - Gateway
  - Transition
  - Intermediate
- **Transition Predecessor**: The flow object that precedes the current flow object. Format must be Name [Identifier]. Multiple Flow Objects can be listed by separating them with a pipe “|”.
- **Transition Successor**: The flow object that succeeds the current flow object. Format must be Name [Identifier]. Multiple Flow Objects can be listed by separating them with a pipe “|”.
- **Flow Object Type**: The BPMN type of the flow object. Refer to the section below for accepted types.
- **Flow Object Category**: The category of the Flow Object
- **Flow Object Procedure**: The description of the Flow Object
- **Value Added**: Corresponds to Value Added (VA) in the Analysis tab in the Governance module. VA is denoted by an “X” in the cell.
- **Non Value Added**: Does not correspond to any value in EPC, but if the value type is Value Enabled (VE) or Non Value Added (NVA), this cell must have an “X”.
- **Waste Necessary**: Corresponds to Value Enabled (VE) in the Analysis tab in the Governance module. VE is denoted by an “X” in the cell.
  - This cell is dependent on the “Non Value Added” cell.
  - If there is an “X” in this cell, there must be an “X” in the “Non Value Added” cell
- **Waste Not Necessary**: Corresponds to Non Value Added (NVA) in the Analysis tab in the Governance module. NVA is denoted by an “X” in the cell.
  - This cell is dependent on the “Non Value Added” cell.
  - If there is an “X” in this cell, there must be an “X” in the “Non Value Added” cell
- **Waste Type**: The type of waste. Accepted values are:
  - (empty)
  - Defects
  - Inventory

    - Motion
    - Over-Processing
    - Over-Production
    - Skills
    - Transport
    - Waiting
- **On Critical Path**: If the process is on the critical path, the value in the cell should be denoted by an “X”. If it is not, the cell should be empty.
- **On High Risk Path**: If the process is on the high risk path, the value in the cell should be denoted by an “X”. If it is not, the cell should be empty.
- **Average Actual Time**: Format must be in D HH:MM:SS
- **Average Waiting Time**: Format must be in D HH:MM:SS
- **Average Inventory Time**: Format must be in D HH:MM:SS
- **Average Transport Time**: Format must be in D HH:MM:SS
- **Average Change Over Time**: Format must be in D HH:MM:SS
- **Average Actual Cost**: Format must be numbers followed by decimals separated by a period (0.0)
- **Number of Active Operators**: Format must be an integer
- **Number of Executions**: Format must be an integer
- **Current Maturity Level**: Format must be an integer

Flow Object Type

Transition

- Sequence Flow
- Default Flow
- Conditional Flow
- Association
- Directed Association
- Bidirected Association
- Conversation

Start

- Message
- Timer
- Escalation
- Conditional
- Error
- Compensation
- Signal
- Multiple
- Parallel Multiple

End

- Message
- Escalation
- Link
- Error
- Cancel
- Compensation
- Signal
- Multiple
- Terminate

Gateway

- None
- Exclusive
- Inclusive
- Parallel
- Complex
- Exclusive – Event Based
- Exclusive – Event Based – Start
- Parallel – Event Based – Start

Task

- Abstract
- Send
- Receive
- User
- Manual
- Business Rule
- Service
- Script

Value Added, Value Enabled and Non Value Added

Refer to the table below for possible combinations for VA, VE and NVA.

Value Added	Non Value Added	Waste Necessary	Waste Not Necessary	Result
X				VA
	X	X		VE
	X		X	NVA

12.1.4.5.1.3.5 Object Details – Risks

The object details specific to process are (including the basic object details):

- **Name**: The name of the risk. Note that there is a 450 character limit per name.
- **Identifier**: The unique identifier of the risk. Note that there is a 255 character limit per identifier.
- **Type**: The type of the risk.
- **Category**: The category of the risk.
- **Description**: The description of the risk.
- **Override Roll Up**: Overrides automatic calculation of residual risk. If residual risk values are specified, this cell must have an “X”.
- **Gross Risk Impact**: The gross impact of the risk. Must be an integer.
- **Gross Risk Likelihood**: The gross likelihood of the risk. Must be an integer.
- **Gross Risk Detectability**: The gross detectability of the risk. Must be an integer.
- **Residual Risk Impact**: The residual impact of the risk. Must be an integer. Note that Override Roll Up must have an “X” in the cell if this value is not empty.
- **Residual Risk Likelihood**: The residual likelihood of the risk. Must be an integer. Note that Override Roll Up must have an “X” in the cell if this value is not empty.
- **Residual Risk Detectability**: The residual detectability of risk. Must be an integer. Note that Override Roll Up must have an “X” in the cell if this value is not empty.
- **Risk Analysis Justification**: The analysis justification of the risk.

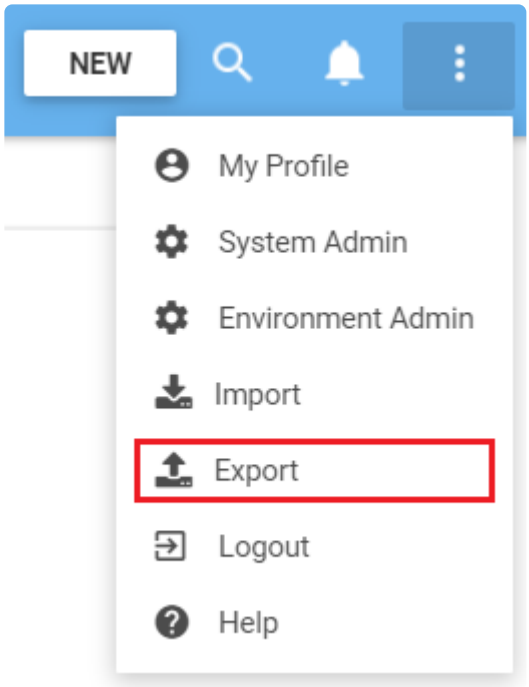
© 2020 Interfacing Technologies Corporation

12.1.4.5.2 Export Excel Content

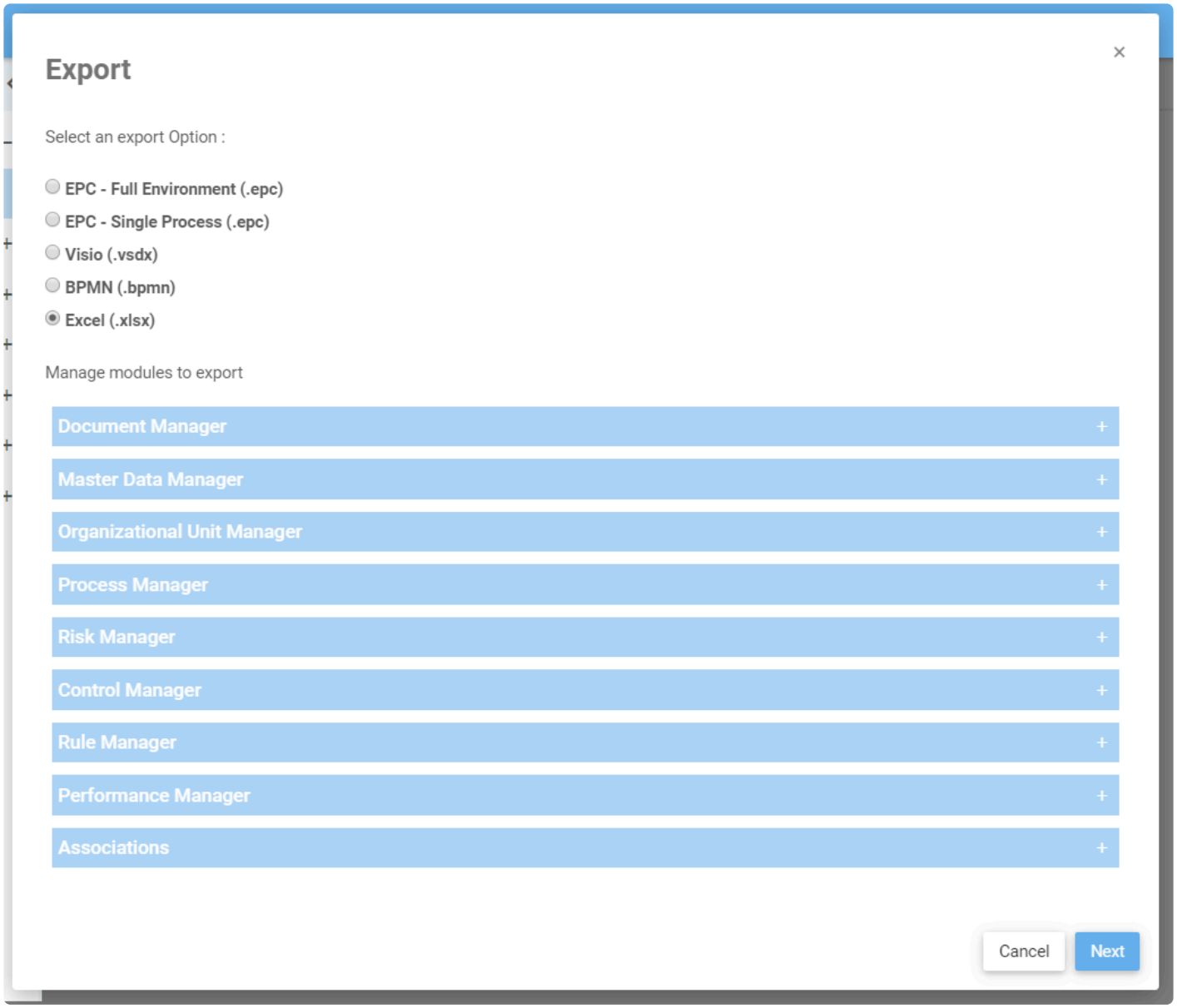
Environment Admins can export EPC content into an Excel spreadsheet. This feature is useful to quickly create an Excel Document containing the EPC content selected by the Admin.

To export an Excel file, follow the steps below:

1. Within the EPC menu (located on the top right corner), click on **Export**

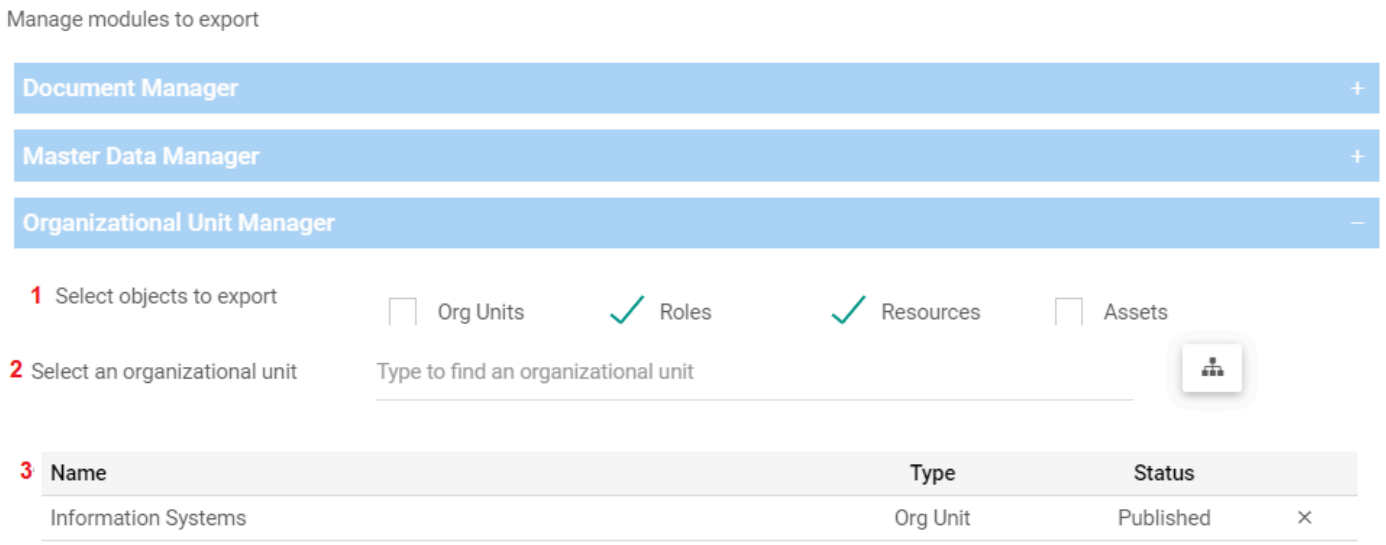


2. In the Export window, select **Excel (.xlsx)**.



3. You will see options to export content from each module. To select an object to export, expand the desired section by clicking on the **+** within a section.

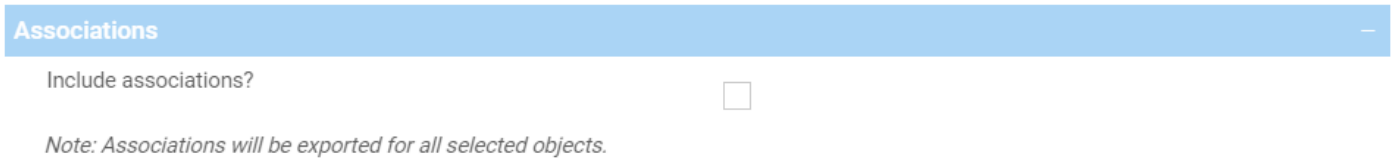
4. For each section, select the desired objects to export.



#	Description
1	You can filter which type(s) of objects to export within an organizational unit. These filters are only available in the Organizational Unit Manager
2	You can type to search for the desired object or select it by using the tree navigator
3	Once an object has been added, they will appear in the list. To remove the item from the list, click on **x** next to the item.

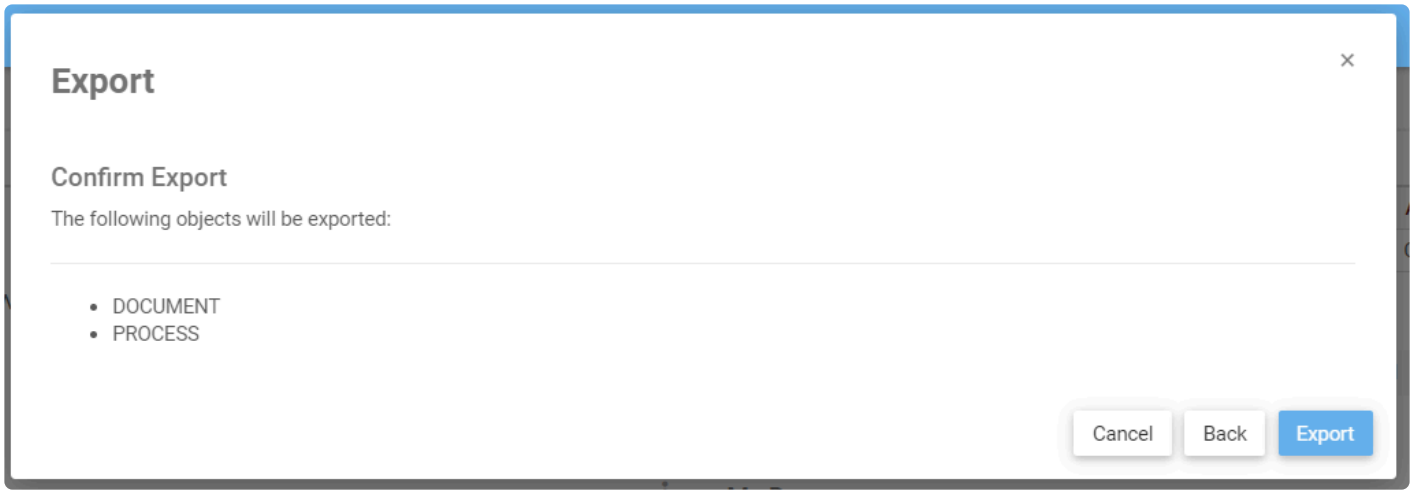
5. Repeat Step 4 for each of the modules

6. Select if you want to include associations. If checked, it will export the object's associations (e.g. documents associated to processes)

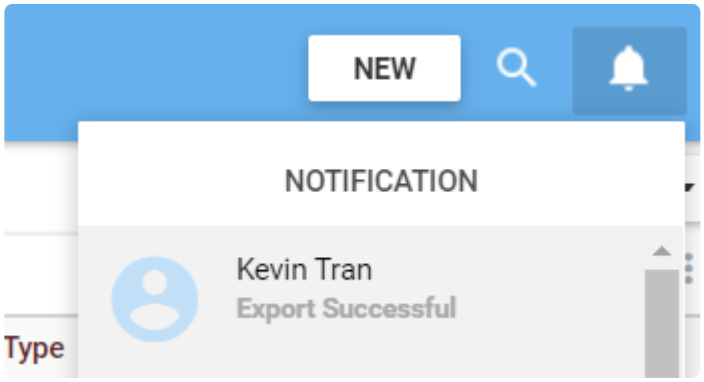


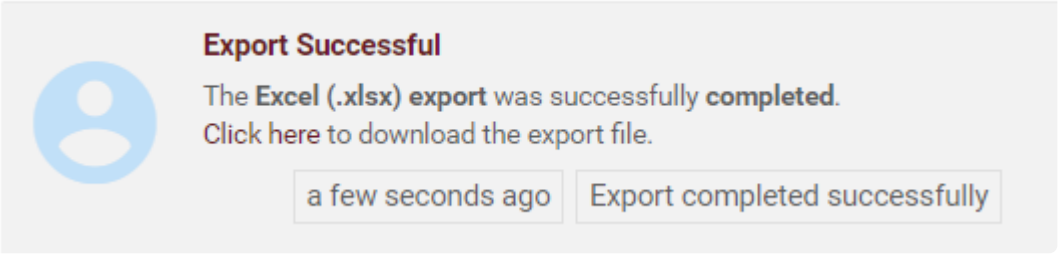
7. Click on **Next**. A final confirmation prompt will appear.

- To finish the export, click on **Export**.
- To go back to the object selection page, click on **Back**
- To cancel the operation, click on **Cancel**



8. You will receive an export notification once it is complete. Click on the notification, then click on the link to download the exported file.





Users can export UDA attributes and their content into a Microsoft excel.
The UDA's that are compatible with exporting are Currency, Duration, Dropdown – Multi-Select, Drop-down – Single Select, Number, Simple Text, Rich Text.

12.1.5 Associations

Web Modelers can associate different EPC objects to another EPC object.

To Associate, Web Modelers need to navigate to the Edit button in the Details tab of the object to access the Edit Details window.

The Association section will cover the different objects that can be associated:

1. Associate Responsibilities
2. Associate Documents
3. Associate Performance
4. Associate Business Rules
5. Associate Risks
6. Associate Controls

12.1.5.1 Assign Responsibilities (RASCI-VS)

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.

What does RASCI-VS stand for

R	Responsible	The “doer” of the work. Responsible for completion of the task or objective or make a decision. Several roles/assets can be jointly Responsible.
A	Accountable	The “owner” of the work. Must sign off or approve when the task, objective or decision is complete.
Su	Support	Resources allocated to responsible. Unlike consulted, who may provide input to the task, support help complete the task.
C	Consulted	Those who need to give input before the work can be done and signed-off on. They are “in the loop” and are an active participant.
I	Informed	Those that need to be kept “in the picture.” They require updates on progress or decisions, but do not need to be formally consulted, nor do they contribute directly to the task or to any decisions.
V	Verifier	Those who check whether the product meets the acceptance criteria set forth in the product description.
Si	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.

Notifications

Any User in an object’s RASCI-VS, either via their Resource or Role(s) will be required to Confirm the object when it is published or deleted, and will receive notifications for any Collaboration posts and replies.

Accountable (A) EPC Responsibilities

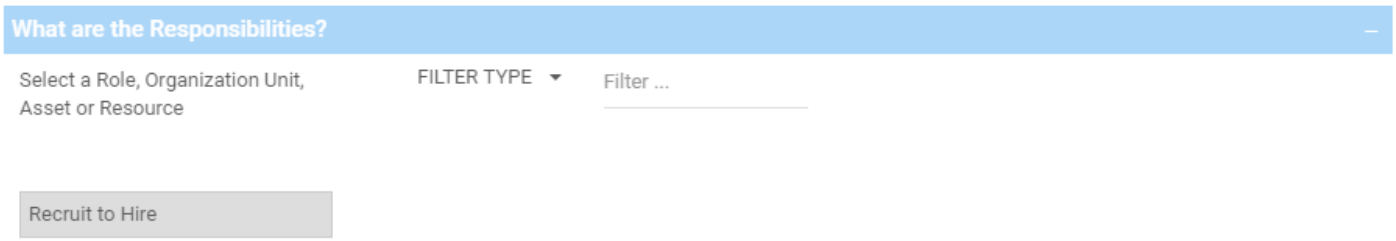
Any User that is identified as Accountable (A) on an object, either via their Resource or Role(s) are capable of the following actions for that object.

- Closing Collaboration Topics
- Approving Improvements
- Assigning Improvement Implementers

Assign Responsibilities – RASCI-VS

You can assign **Organization Units, Roles, Resources, and Assets** to the RASCI-VS of any EPC object (excluding Sets and Folders).

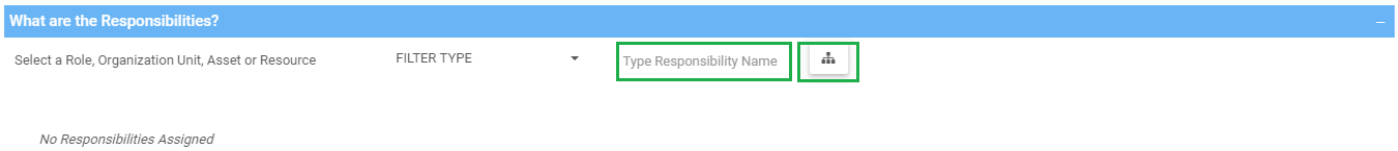
> ! It is not recommended to assign Resources directly to an object. Should that resource leave or be replaced, you will need to update each object with the new resource, which can be time-consuming. Instead, use the Resource's Role, which can would only require one single update to the Resource-Role relationship.



1. Search

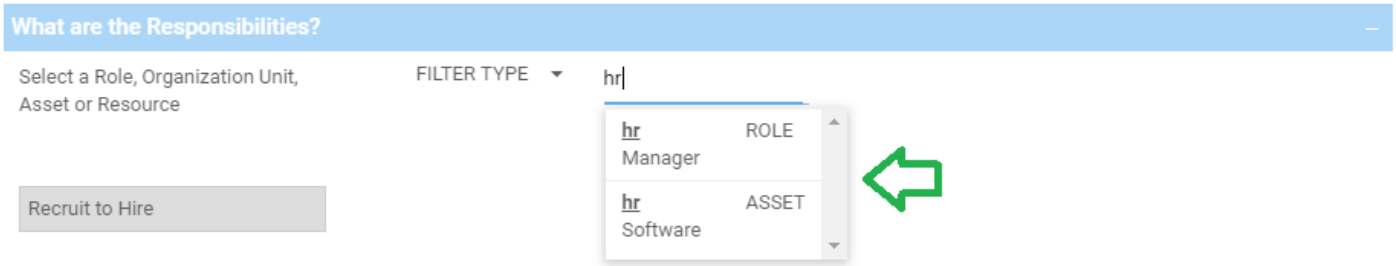
To find the Organization Unit, Role, Resource, or Asset, begin typing the **Name** in the search bar, results will be refined as you type. (For this example, a Role "HR Manager" and Asset "HR Software will be added)

Otherwise, you can click the to search for a Role, Resource, Asset, or Organization unit from the hierarchy tree structure.



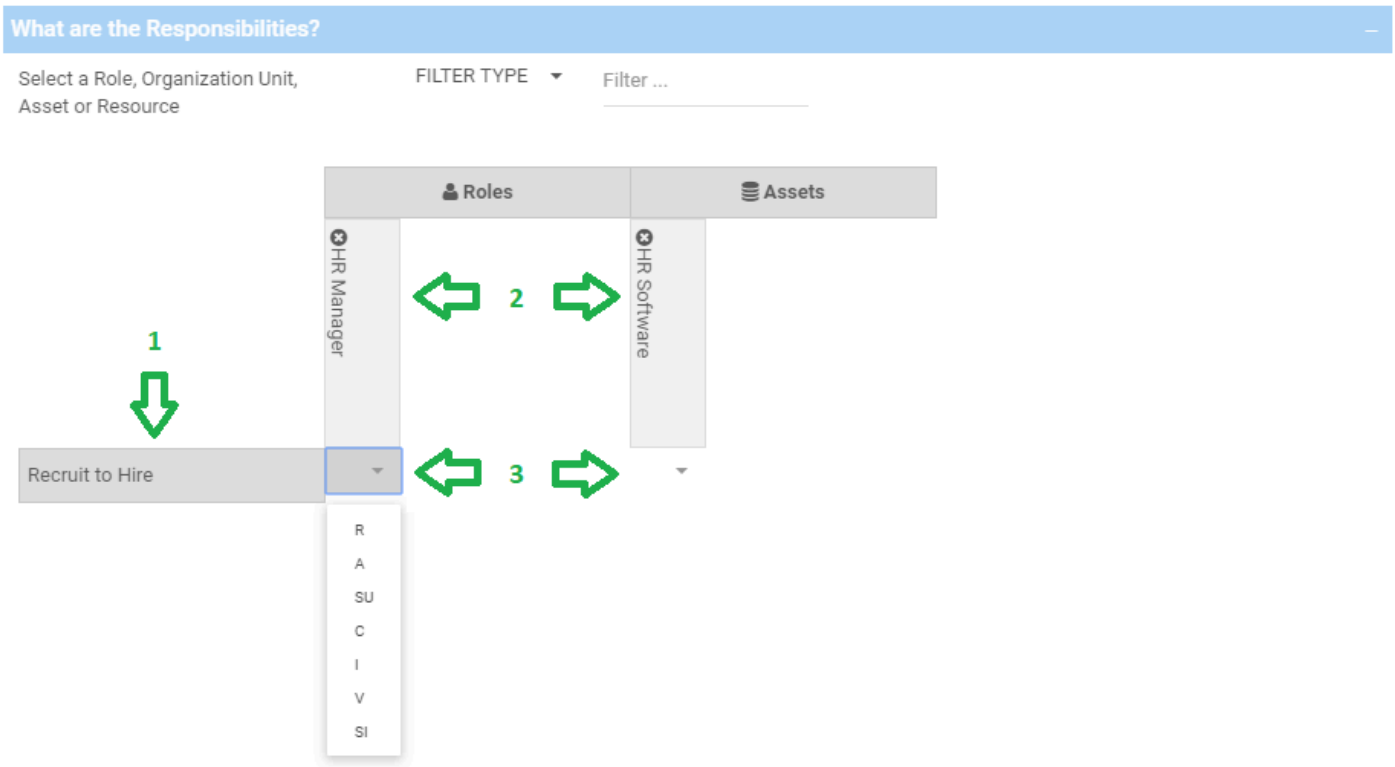
2. Select Stakeholder

From the List of suggestions, click to select the one you would like to add.



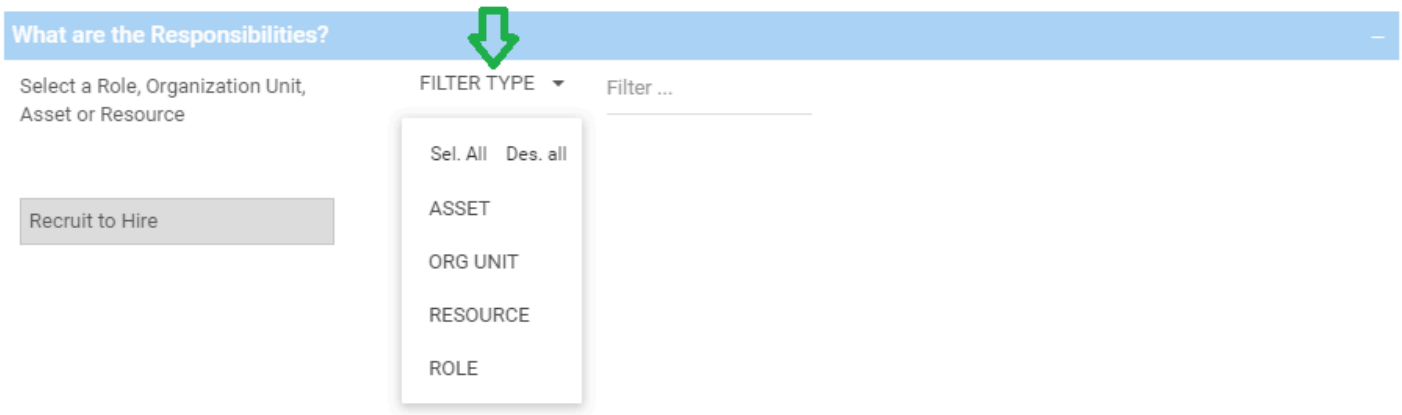
In the area below the search bar, you will see

1. The name of the object you are editing (the “Recruit to Hire” process in this example)
2. The Organization Unit, Role, Resource, or Asset that you have added (the “HR Manager” and “HR software” in this example)
3. A Drop-down selector below each added stakeholder



Filter

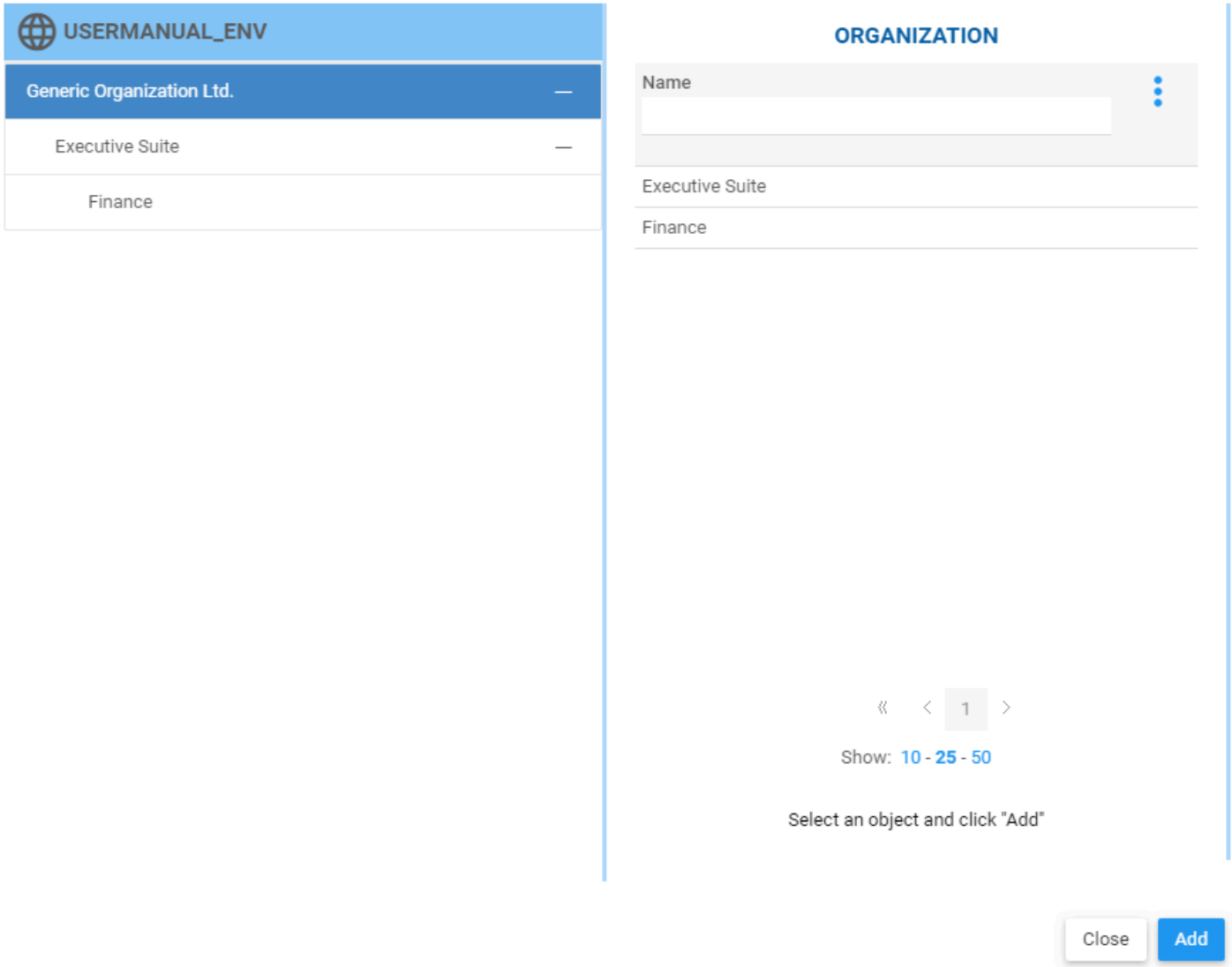
If you want to filter by specific type, click the **FILTER TYPE** and select one or more types.



Search from hierarchy tree

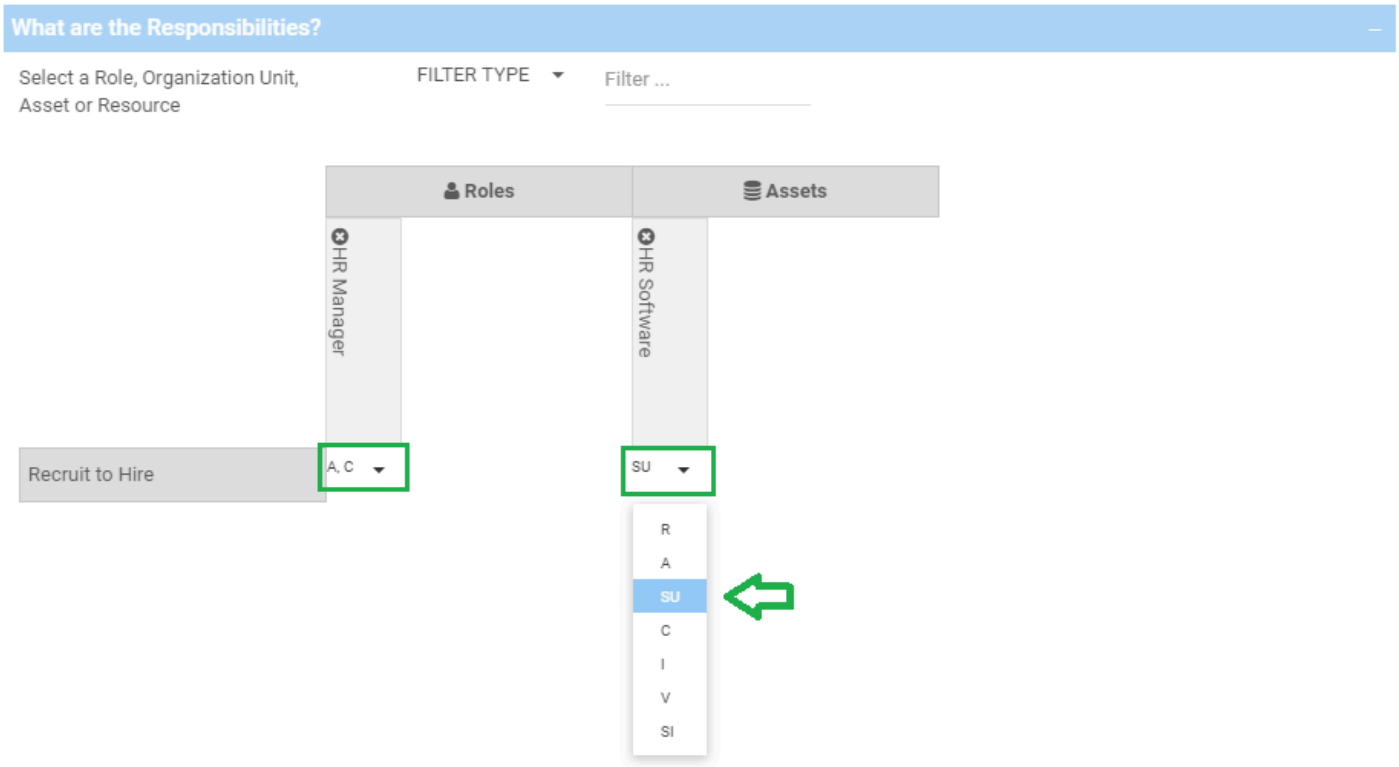
This interface replicates the hierarchy tree of objets in the Organization module.

1. Expand the Sets and Organization Units in the hierarchy tree on the left to find the Organization Unit, Role, Resource, or Asset you are looking for.
2. Select the object you want from the list on the right and click **Add**.
    a. You can add more than one Organization Unit, Role, Resource, or Asset from this interface by selecting another and clicking **Add**.



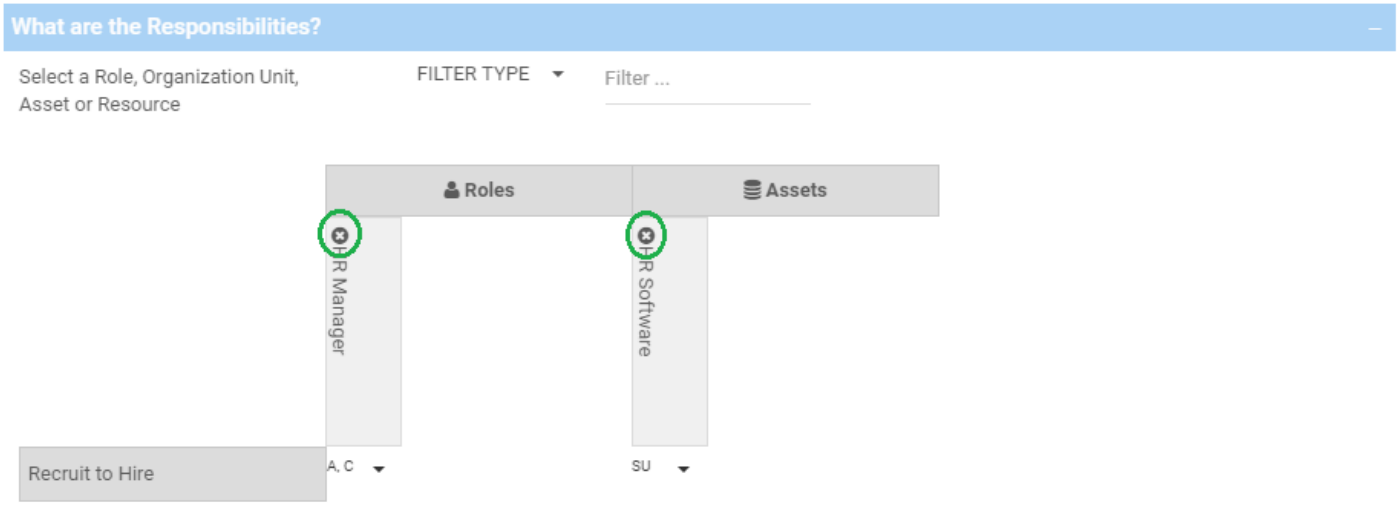
3. Select RASCI-VS

Select **one or more** RASCI-VS values. (the “HR Manager” is Accountable and Consulted, and the “HR Software” is Support for this process)



Remove RASCI-VS

You can remove any stakeholder by clicking the **X** button above their name.



12.1.5.2 Associate Documents

Documents

Documents can be associated to any object (except Sets and Folders). Documents are stored in a centralized document repository on the EPC Web App. Under this sub-section of the General Details, Web Modelers can choose a document from the repository and associate it to a specific process where the document is needed.

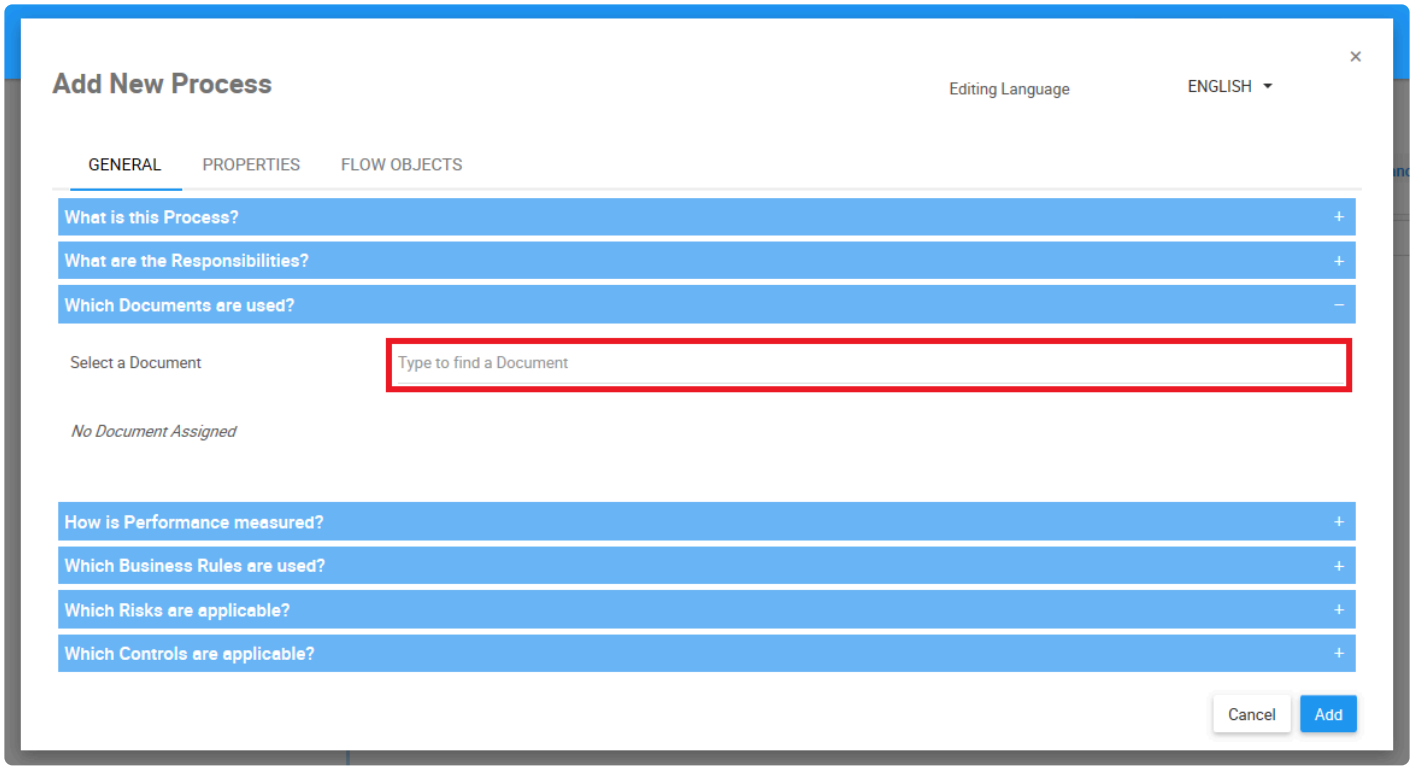
This section is available within the edit form of the object when you Create or Edit an object.

Associate Documents

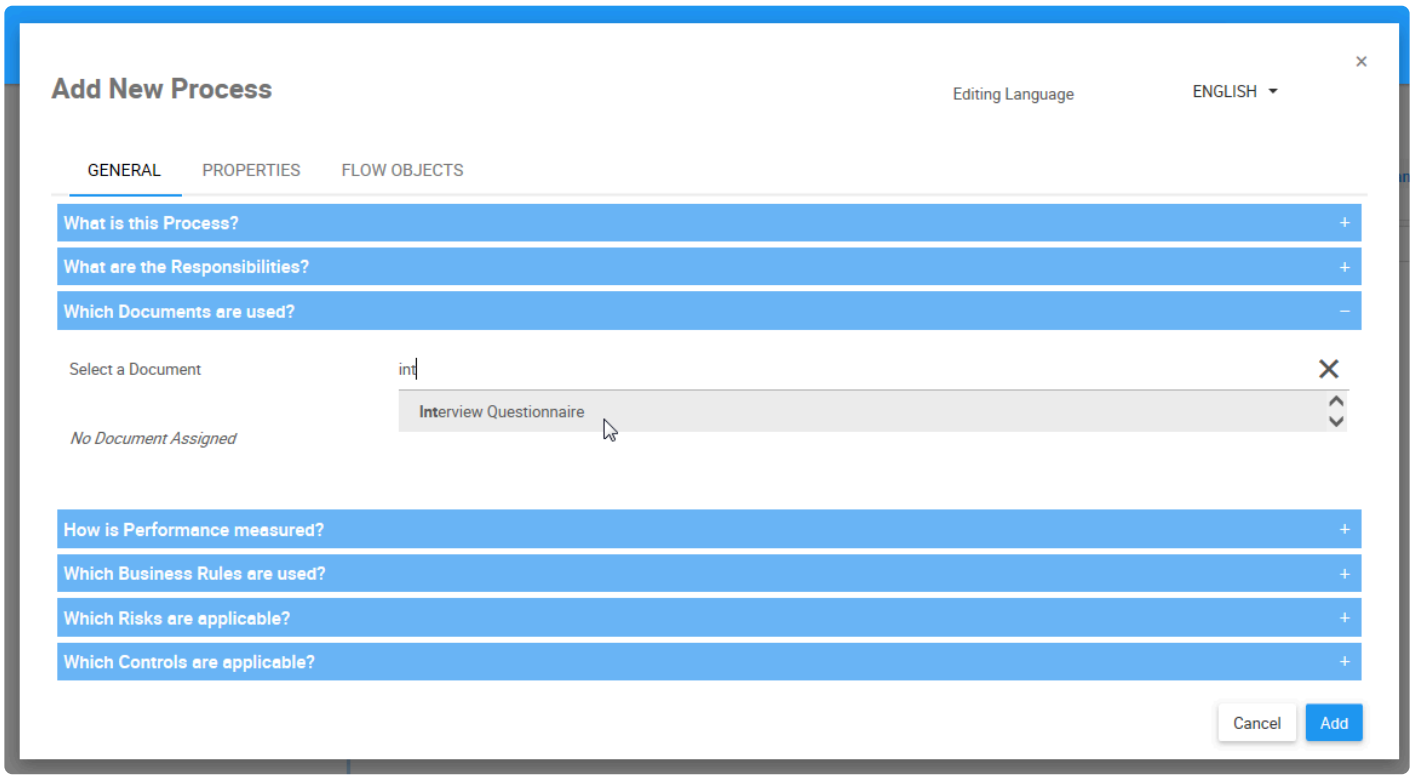
1. Navigate to the “Which Documents are used?” section and click on the + icon to expand the section.

2. Search for Documents

To associate a document type the **name** of the document you want to associate. (for this example, we will look for the document “Interview Questionnaire”).

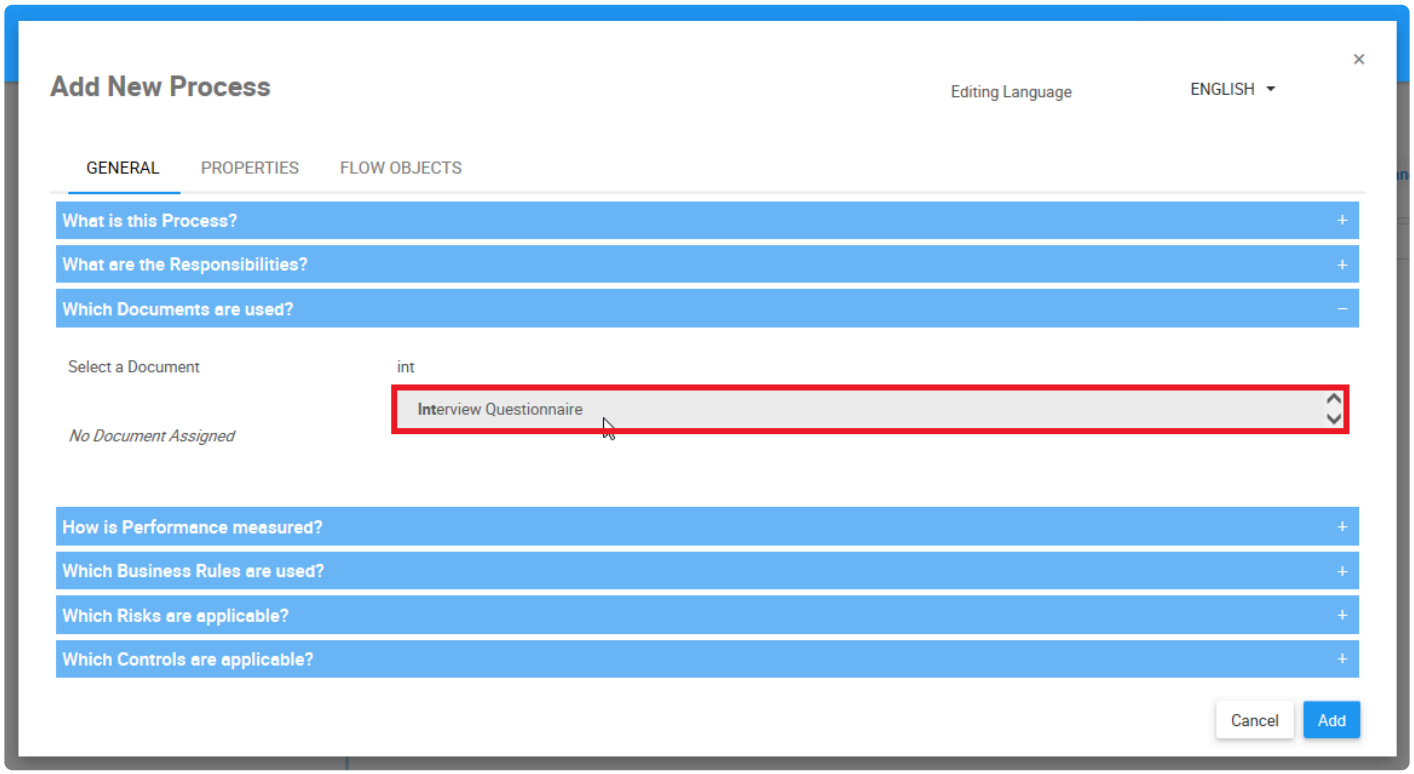


The list of documents will populate based on key word typing



3. Select the Document

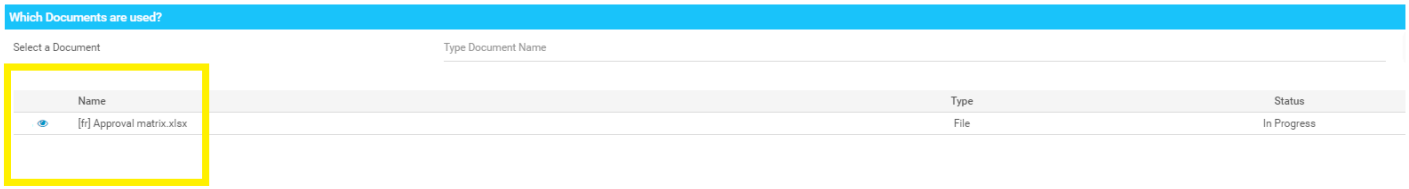
From the search suggestions, click to select the document you want to associate.



4. List of Associated Documents

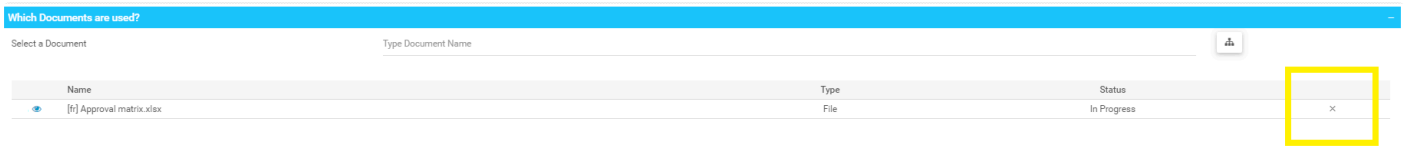
The document(s) will appear in a table displaying the name of the document, its type, and its status.

> Web Modelers can add multiple documents to any object, and many objects can use the same document.



Remove Documents

To remove the document from the object, click on the ✕



To create new Documents, click here

12.1.5.3 Associate Performance

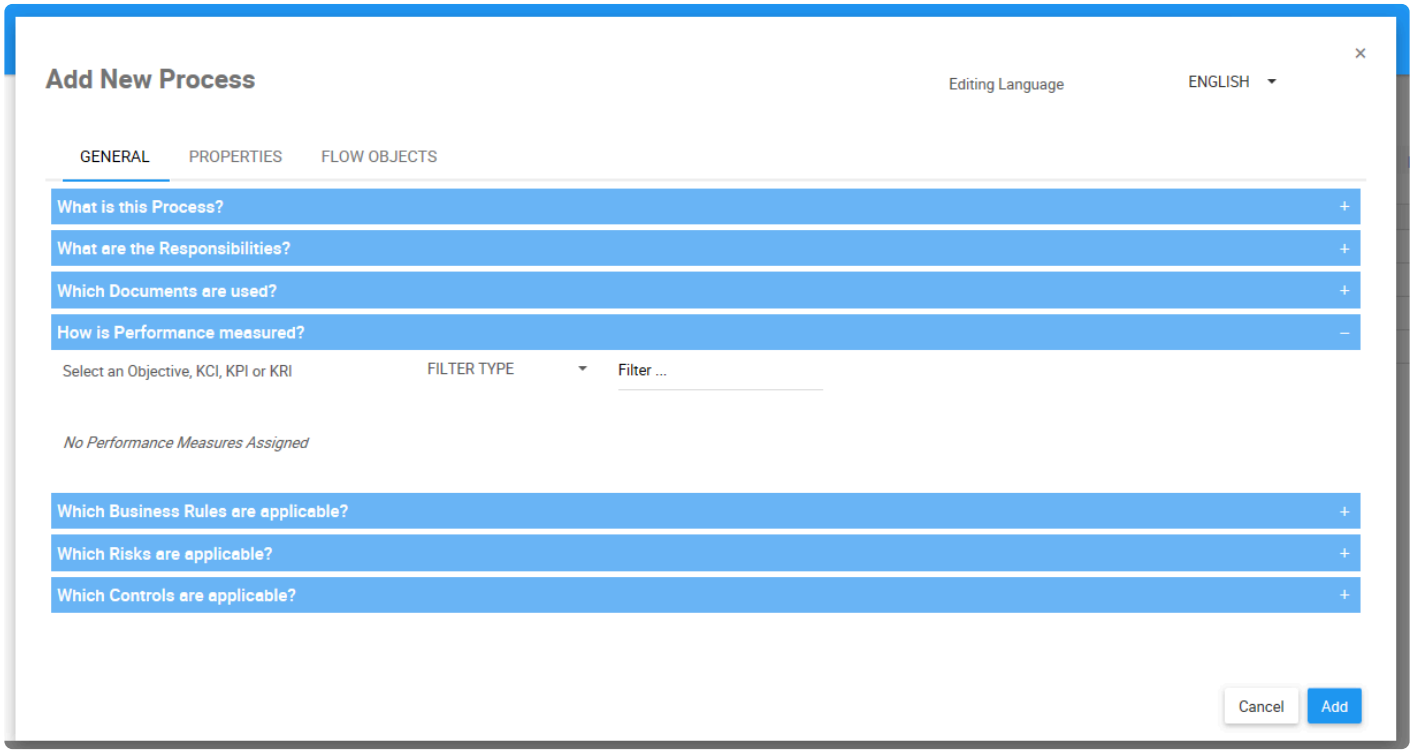
Performance Objectives and Indicators

Objectives and Performance Indicators (KCI, KPI, and KRI) are used to measure process performance. They can be associated to Processes or Flow Objects (Tasks, Events, and Gateways). Objectives and Performance Indicators are created and managed within the Performance module. Under this sub-section of the General Details, Web Modelers can assign Objectives or Performance Indicators to specific Processes or Flow Objects where performance is measured.

This section is available within the edit form of Processes and Flow Objects.

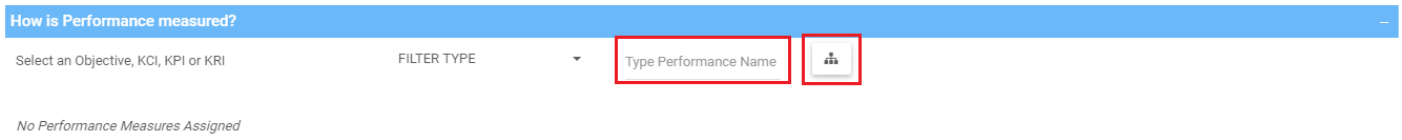
Associate Objectives and Indicators

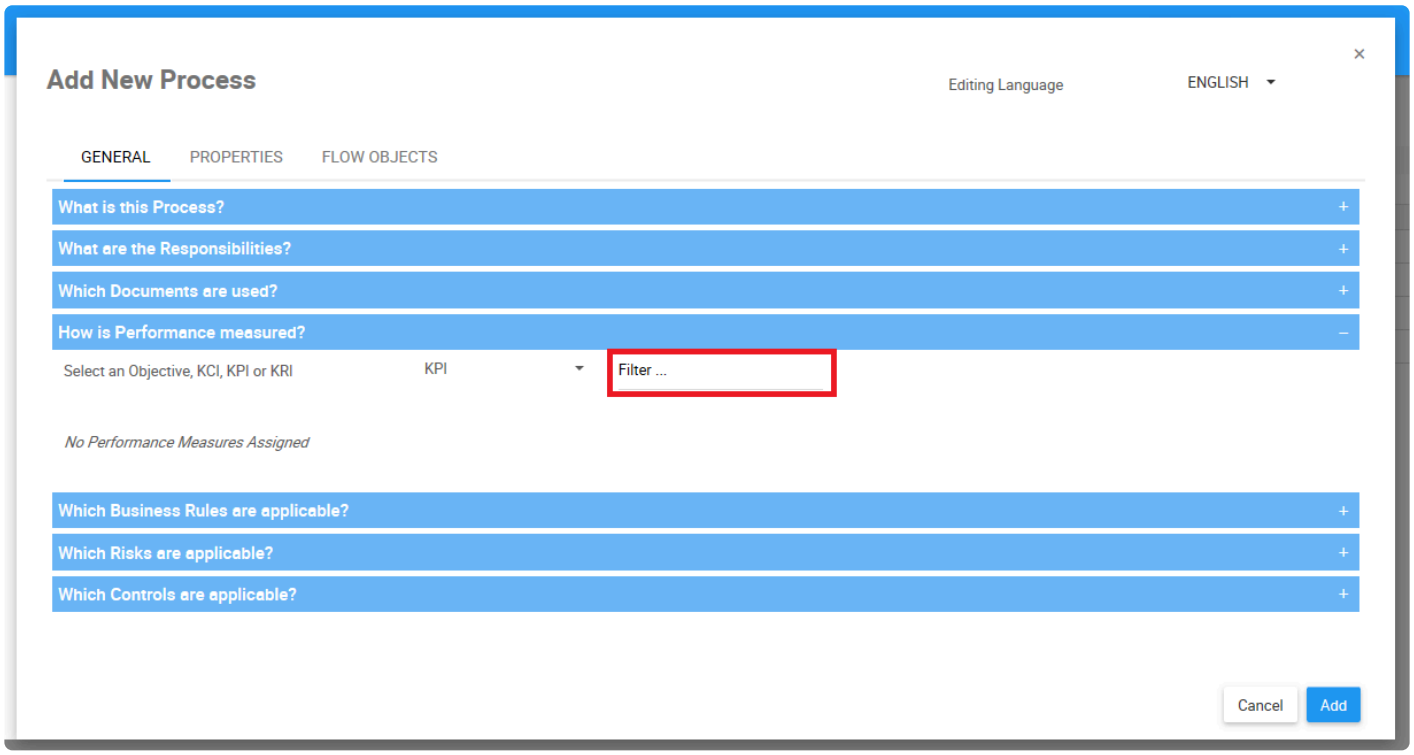
1. Navigate to the “How is Performance Measured?” section and click on the + icon to expand the section.



3. Search for Objectives or Indicators

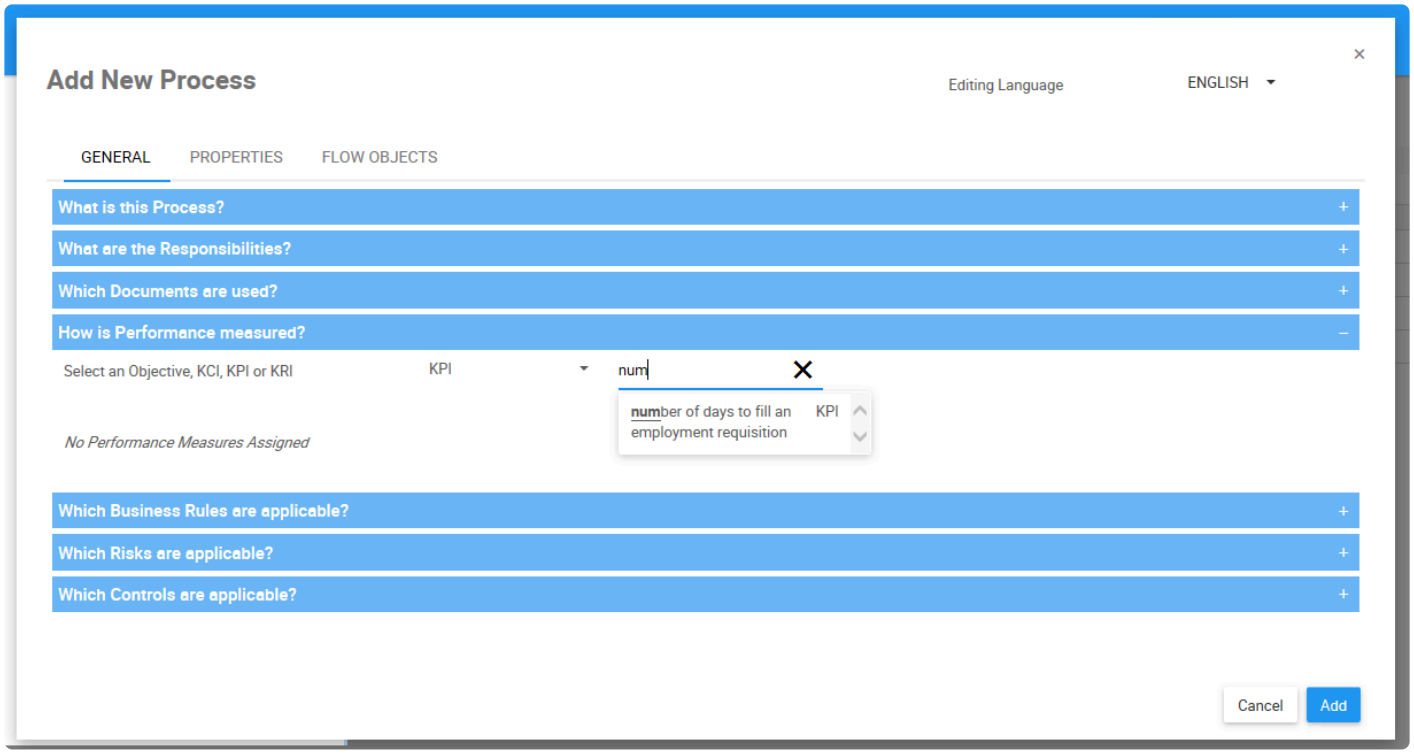
To associate an Objective or Performance Indicator, navigate to the “Filter” box.





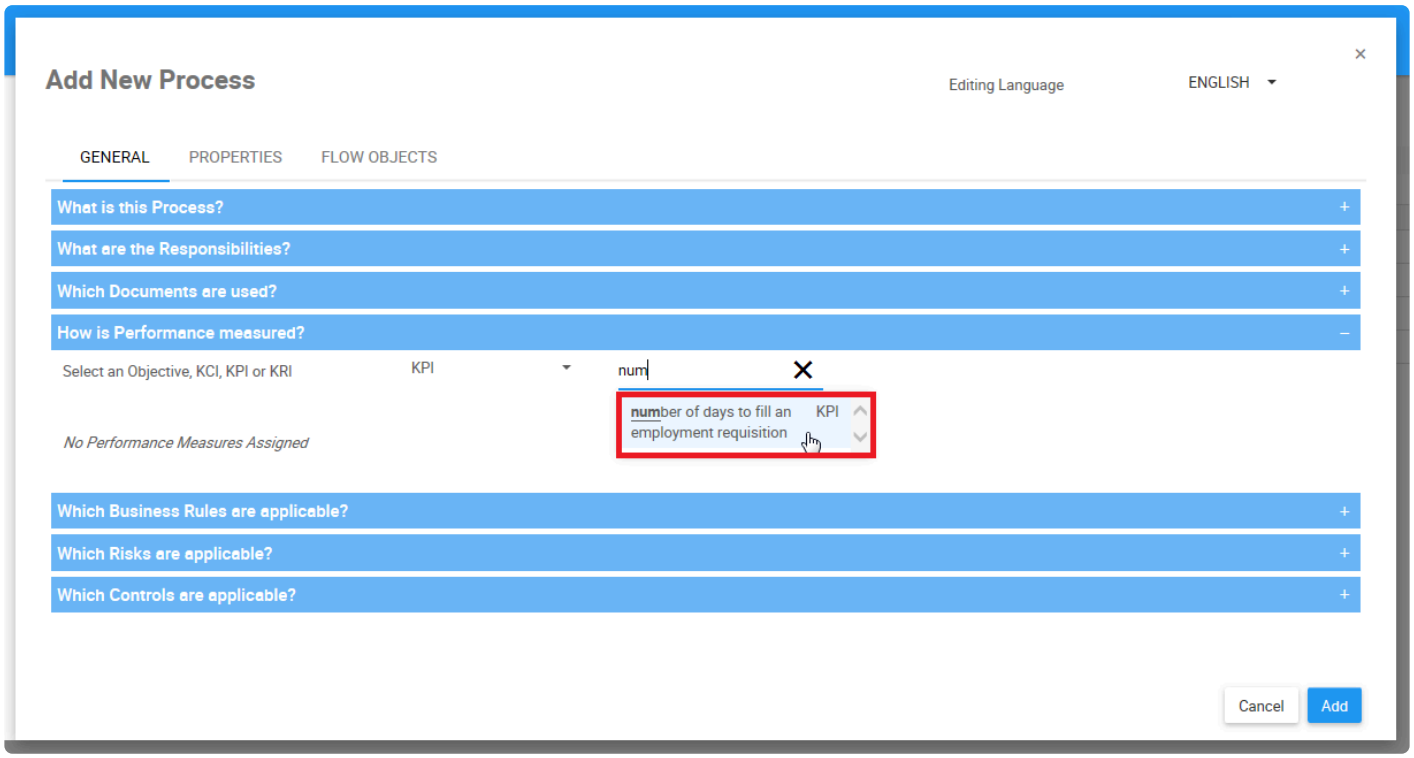
Type the **name** of the one you want to associate.

> The list of suggestions will populate based on key word typing



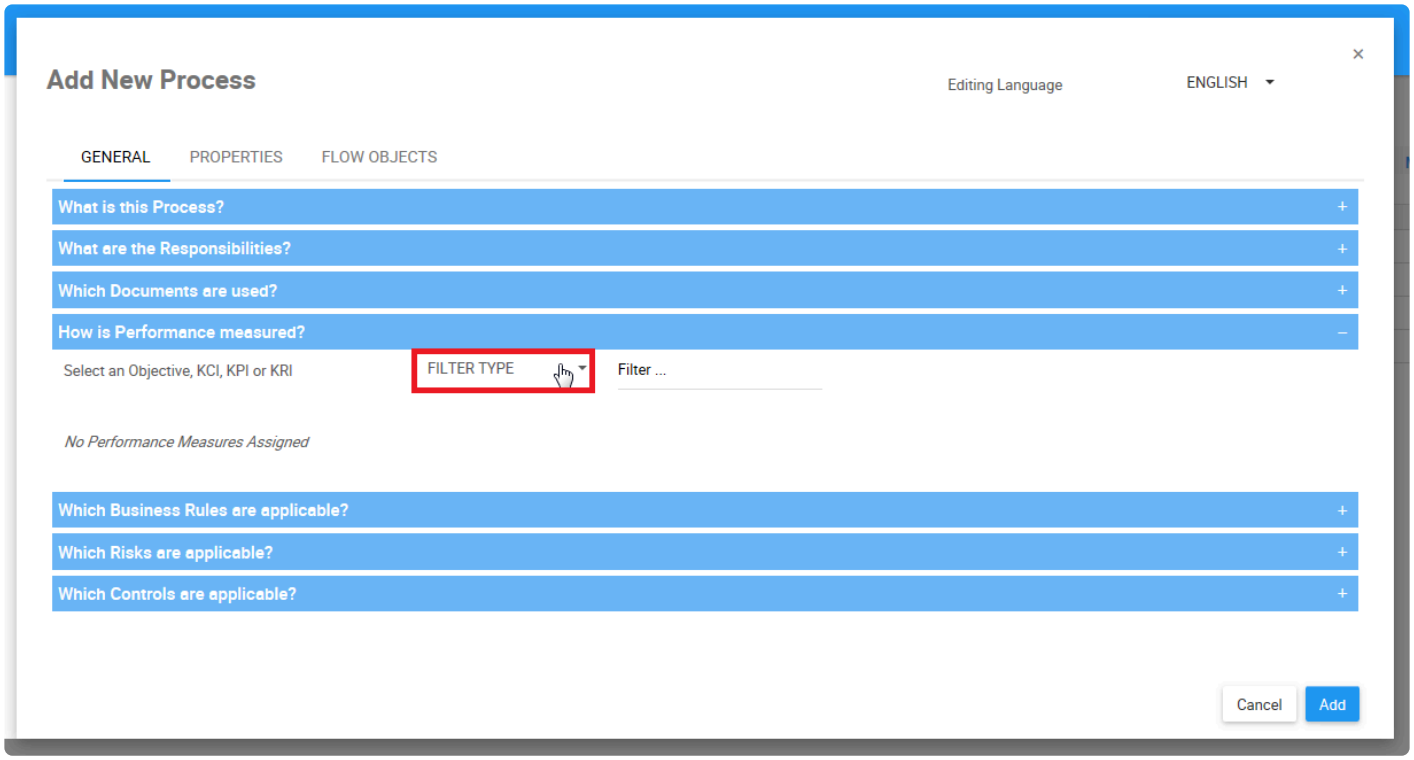
4. Select the Objective or Indicator

From the search suggestions, click to select the one you want to associate.

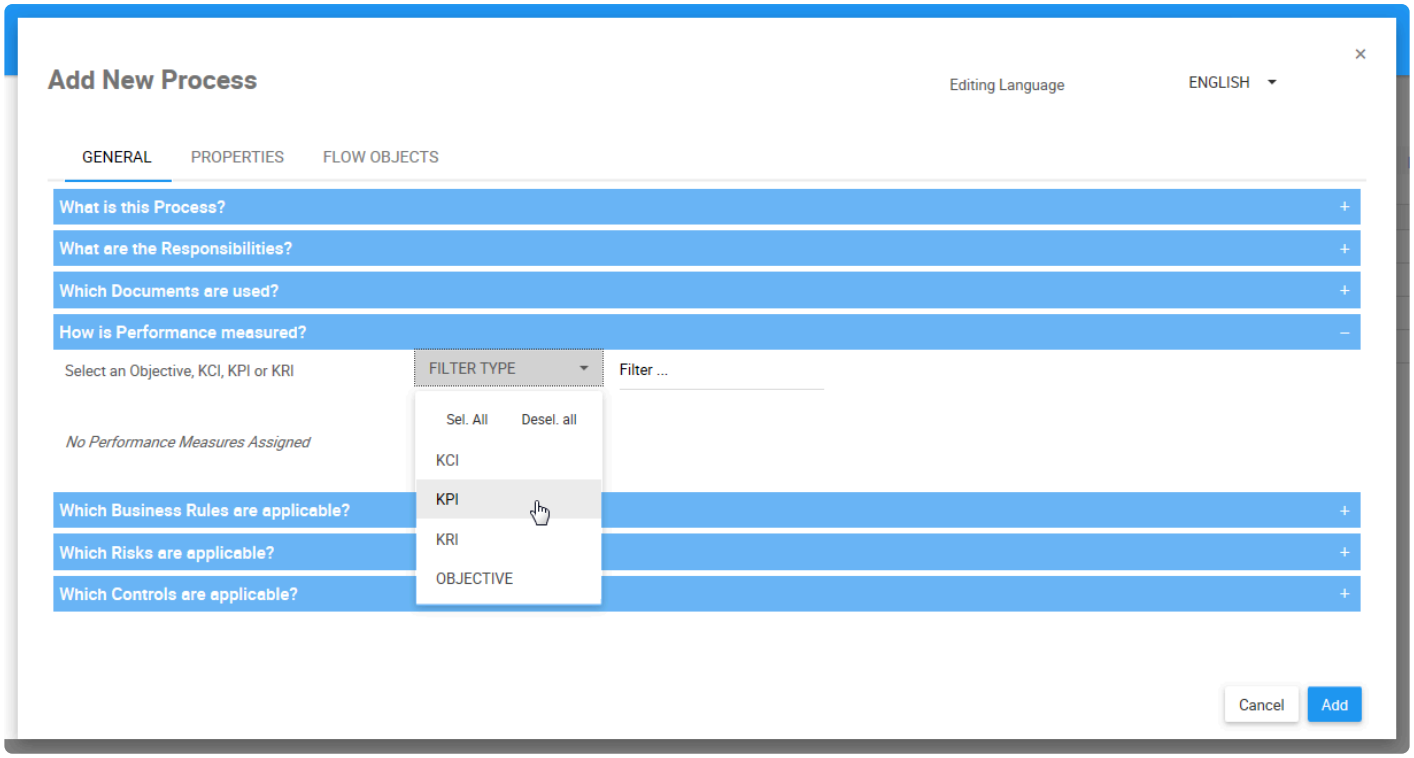


Filter by Type (KCI, KPI, KRI, Objective)

Navigate to the “Filter Type” box



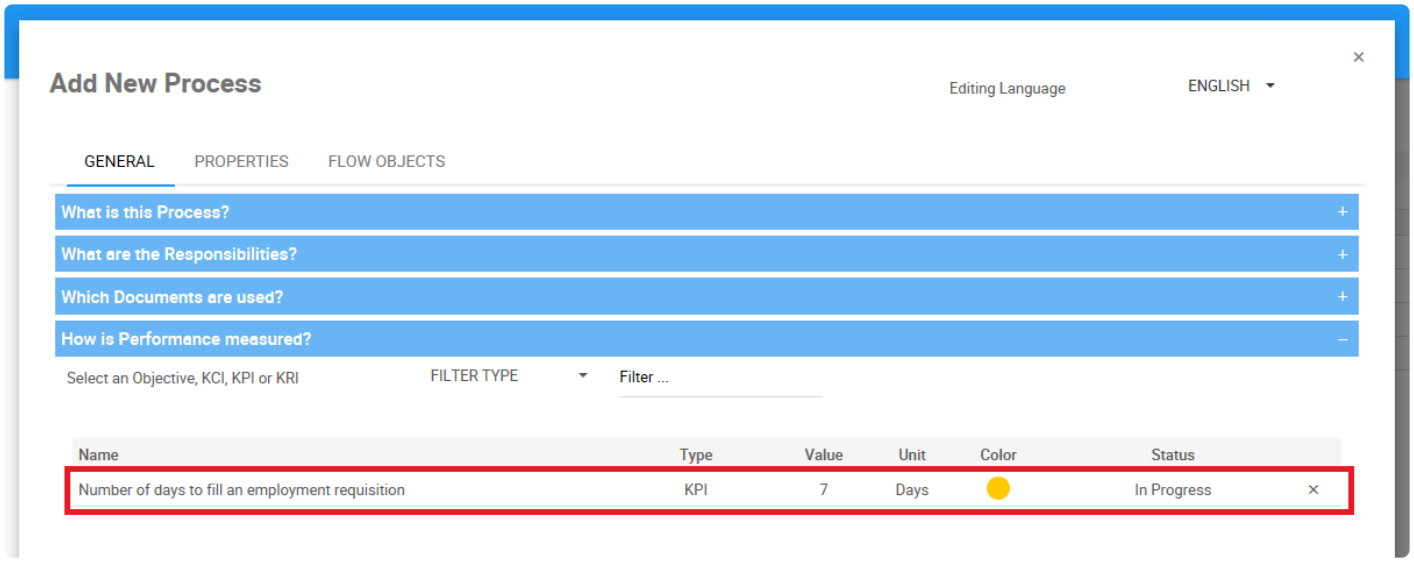
Select the Filter you want to use. In this example, a KPI filter



5. List of Associated Objectives and Indicators

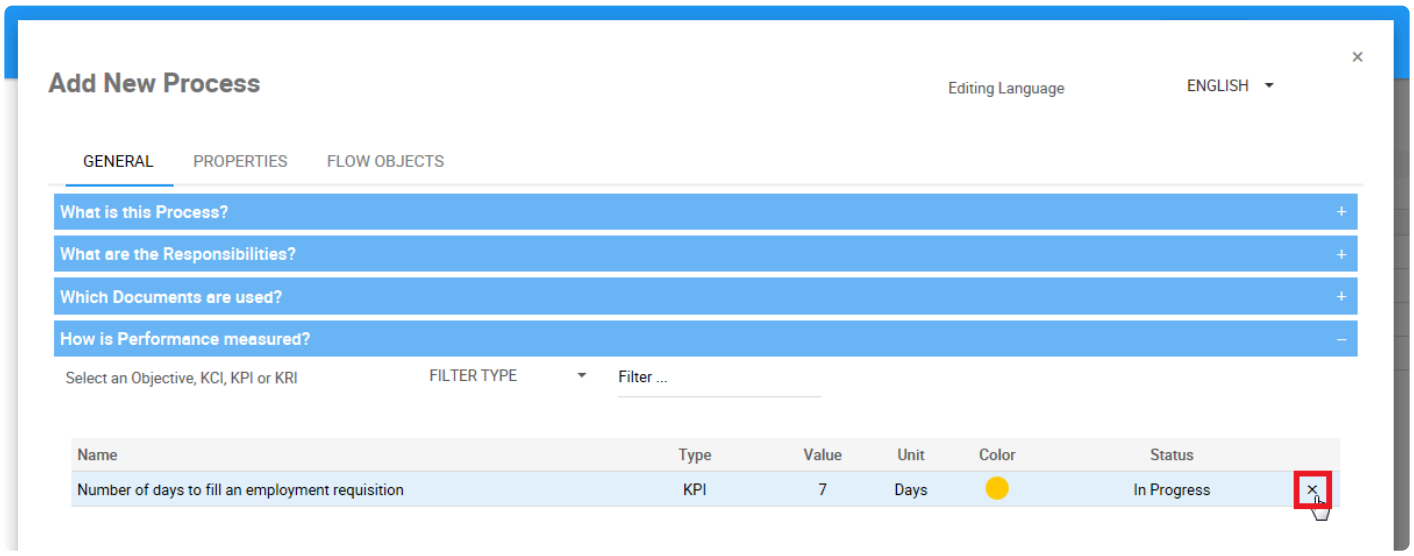
The Objectives and Performance Indicators will appear in a table displaying the items name, type, value, unit, (current) color, and status.

Web Modelers can add multiple Objectives and Performance Indicators to any Process or Flow Object, and many Processes and Flow Objects can have the same Objectives and Performance Indicators.



Remove Objectives and Indicators

To remove the Objective or Indicator from the object, click on the ×



To create new Performance Objects, click here

12.1.5.4 Associate Business Rules

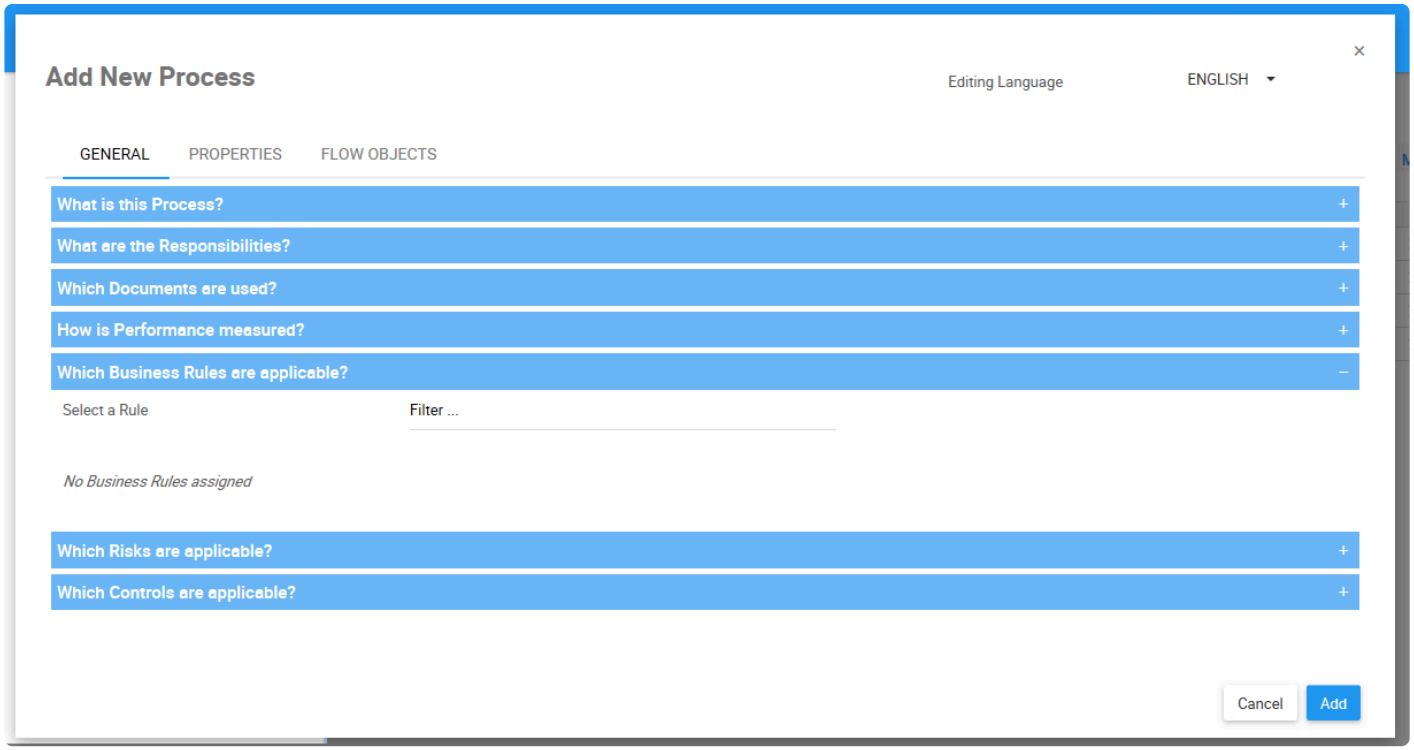
Business Rules

Business Rules can be associated to Processes, Flow Objects, Assets, and Business Rules (as Child Rules). Business Rules are stored and managed in the Rules Module. Under this sub-section of the General Details, Web Modelers can assign Business Rules to the aforementioned objects.

This section is available within the edit form of Processes, Flow Objects, Assets, and Business Rules (as Child Rules)

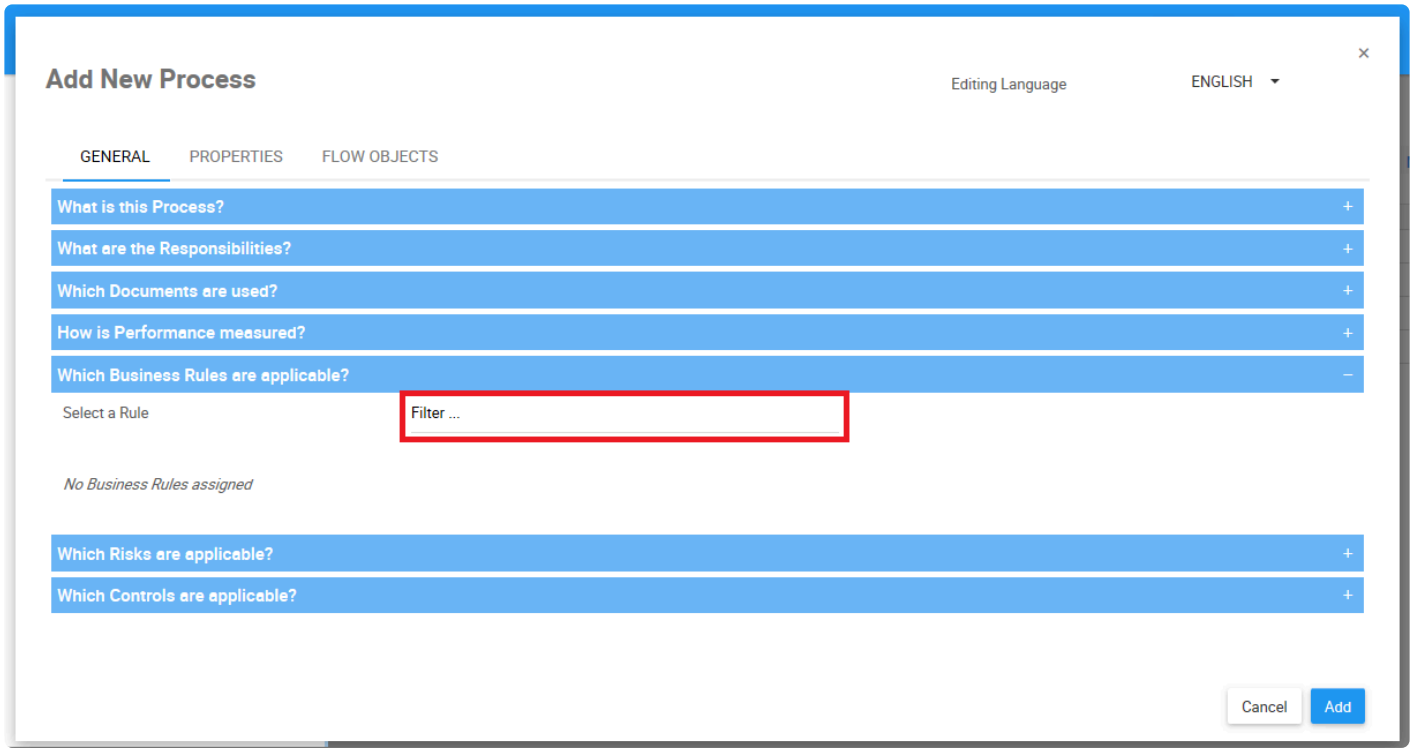
Associate Business Rules

1. Navigate to the “Which Business Rules are applicable?” section and click on the + icon to expand the section.

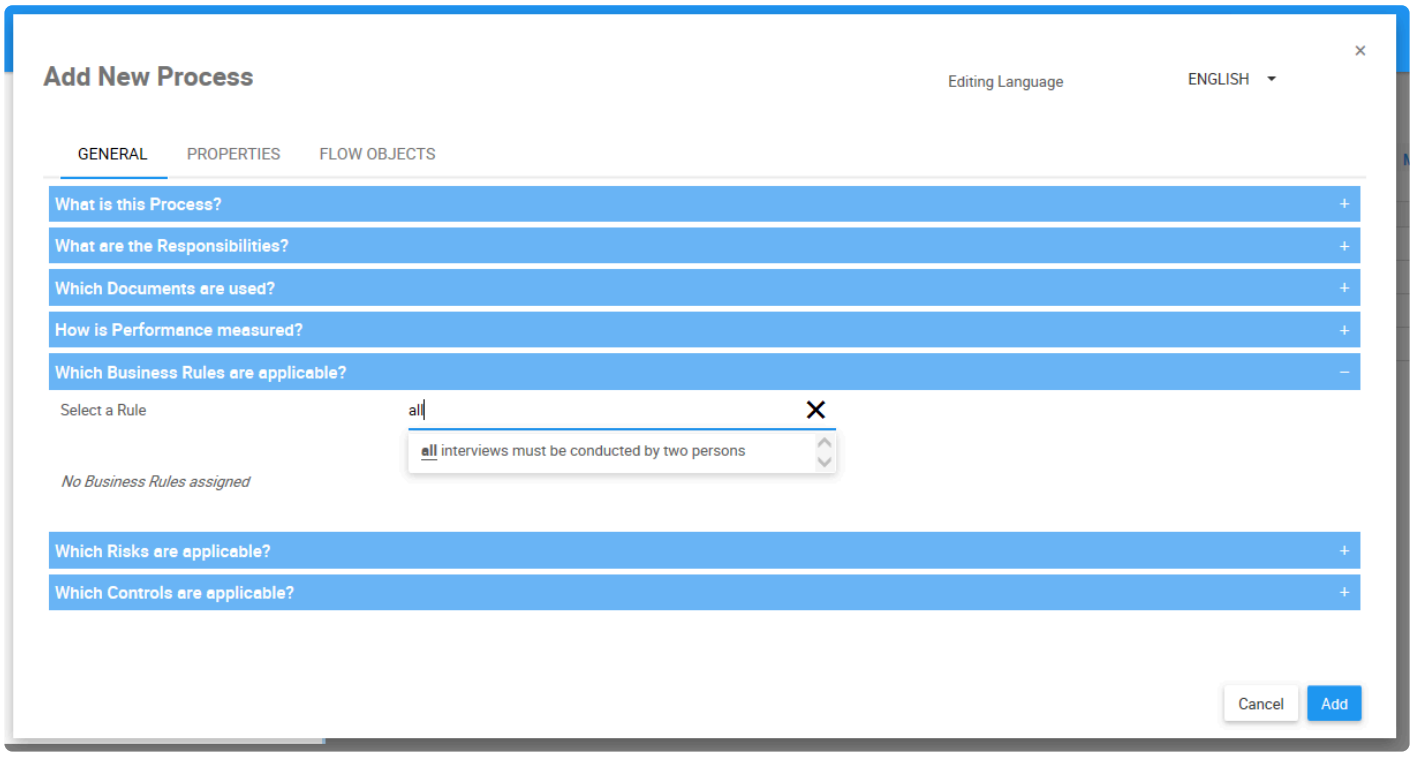


2. Search for Business Rules

To associate a Business Rule, type the **name** of the one you want to associate.

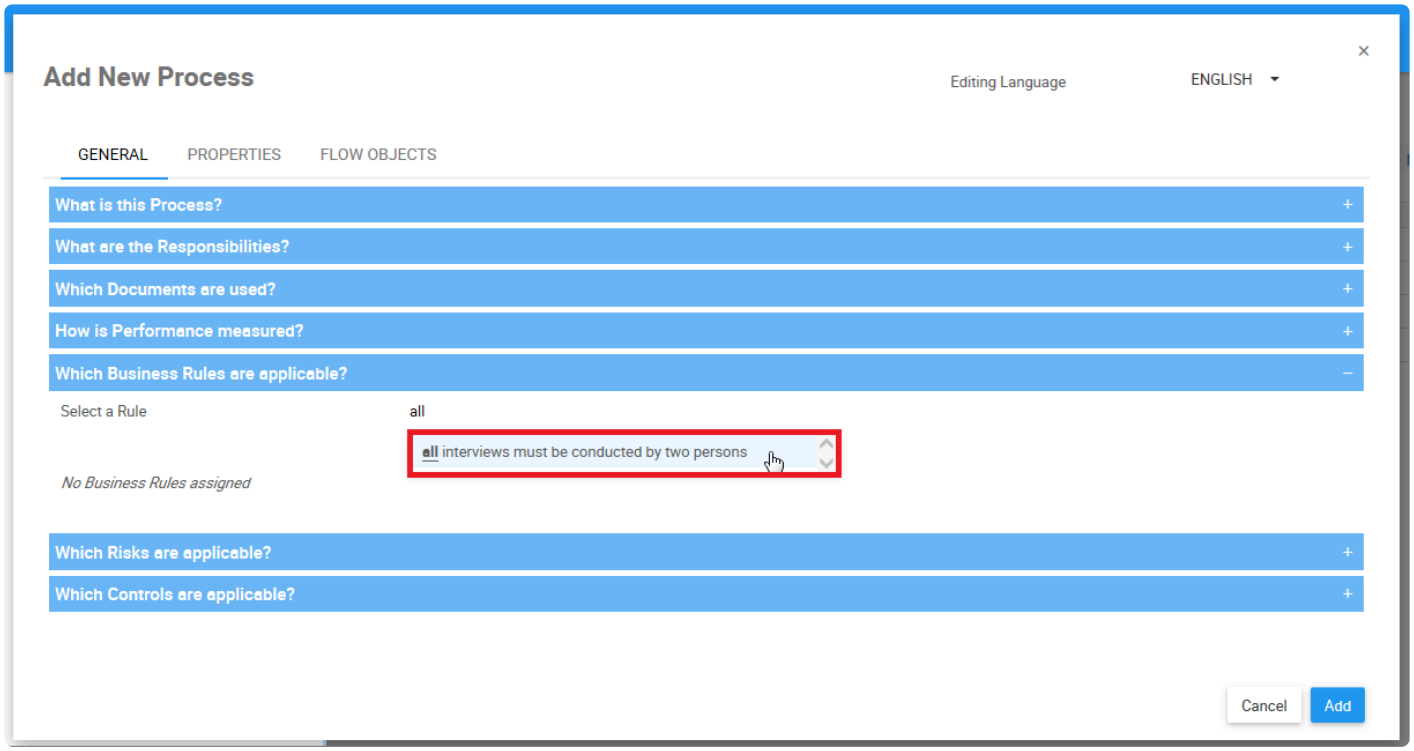


The list of suggestions will populate based on key word typing



3. Select the Business Rule

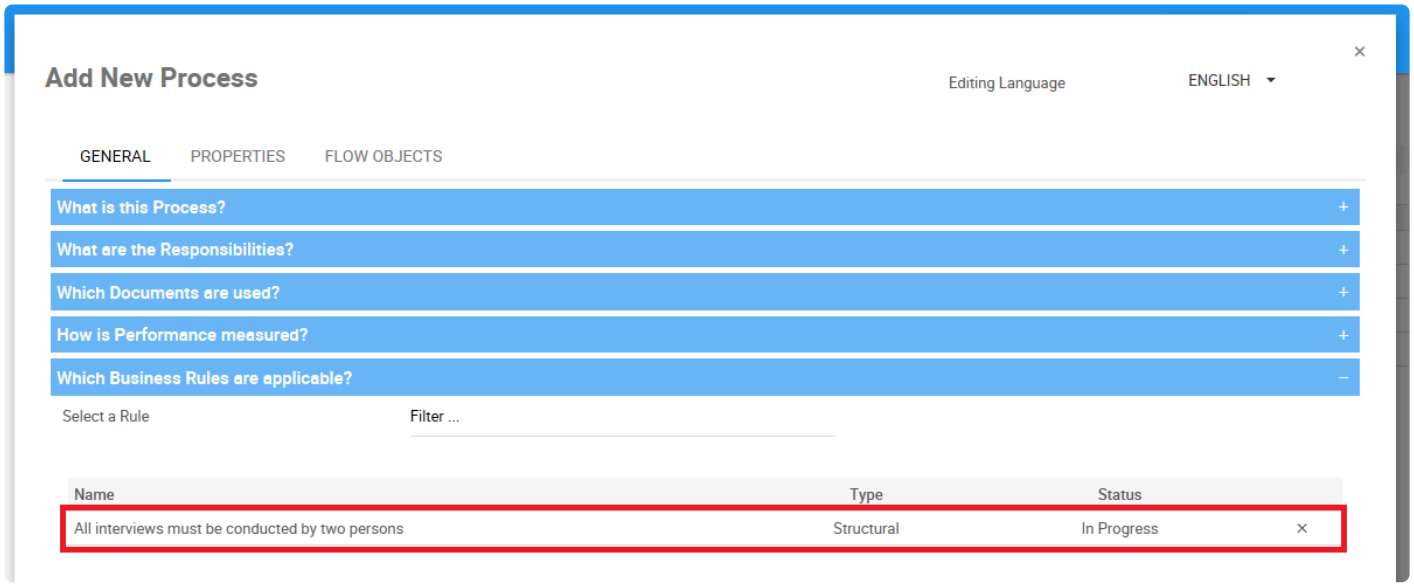
From the search suggestions, click to select the one you want to associate.



4. List of Associated Business Rules

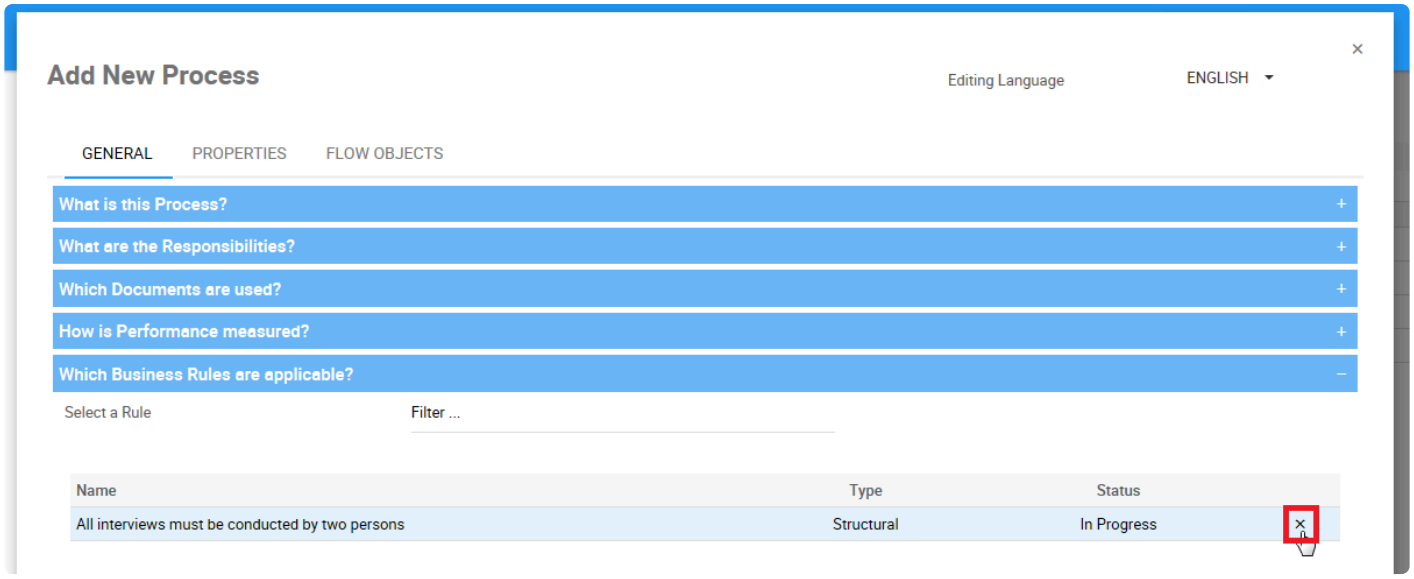
The Business Rules will appear in a table displaying the items name, type, and status.

> Web Modelers can associate multiple Business Rules to any Process, Flow Object, Asset, and Business Rule (as Child Rules) and many Processes, Flow Objects, Assets, and Business Rules can have the same Business Rules.



Remove Business Rules

To remove the Business Rule from the object, click on the ×



To create new Business Rules, click here

12.1.5.5 Associate Risks

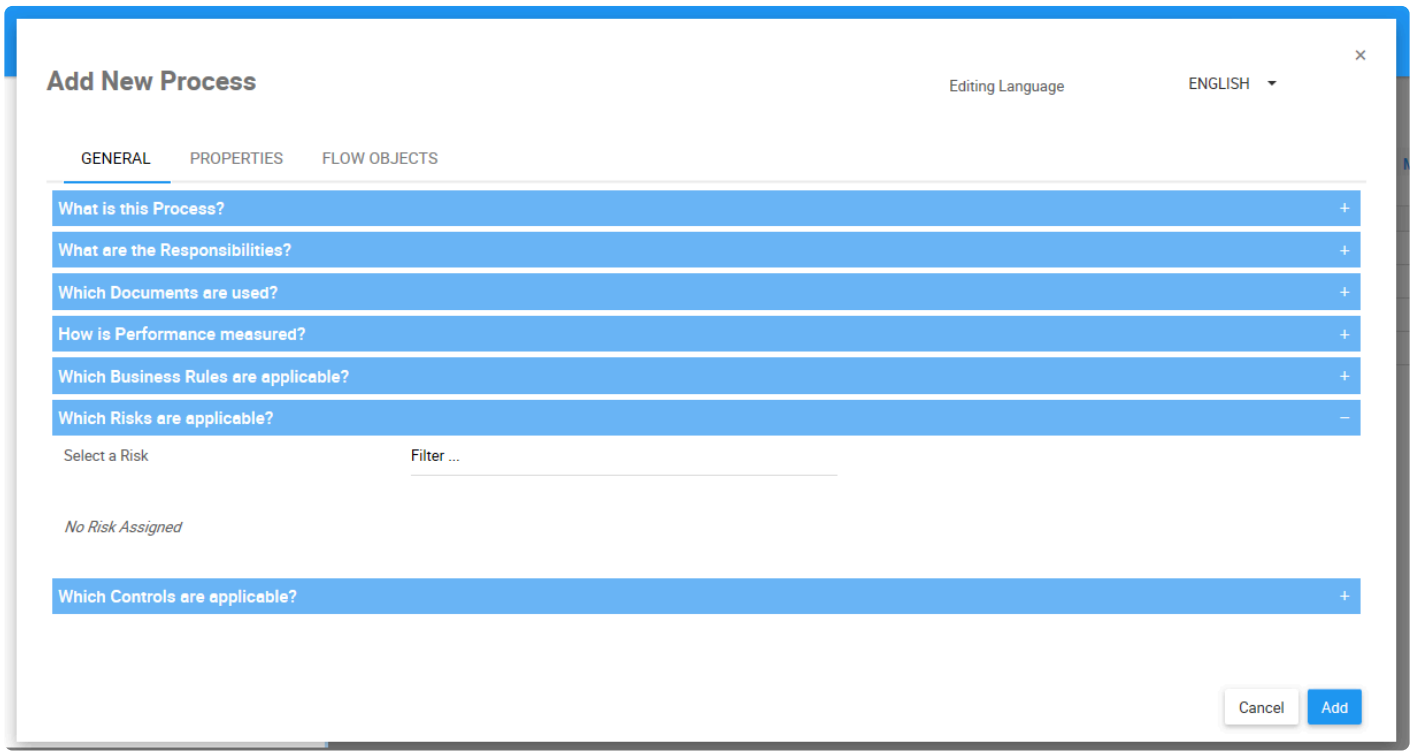
Risks

Risks are used to identify and evaluate Risks They can be associated to Processes or Flow Objects (Tasks, Events, and Gateways), Rules, Performance Indicators, and Risks (as Child Risks). Risks are created and managed within the Risks module. Under this sub-section of the General Details, Web Modelers can associate Risks to specific Processes or Flow Objects (Tasks, Events, and Gateways), Rules, Performance Indicators, and Risks (as Child Risks) wherever they apply.

This section is available within the edit form of Processes or Flow Objects (Tasks, Events, and Gateways), Rules, Performance Indicators, and Risks (as Child Risks).

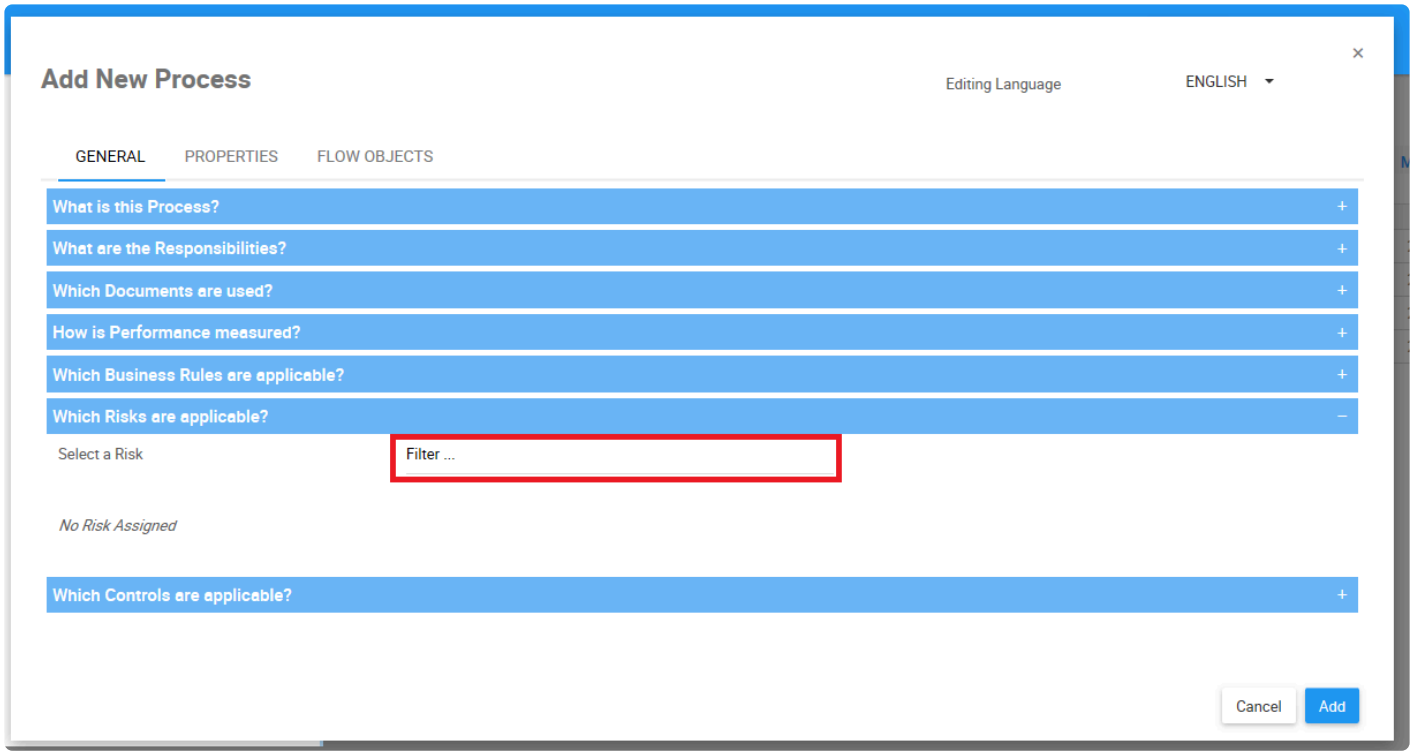
Associate Risks

1. Navigate to the “Which Risks are applicable?” section and click on the + icon to expand the section.

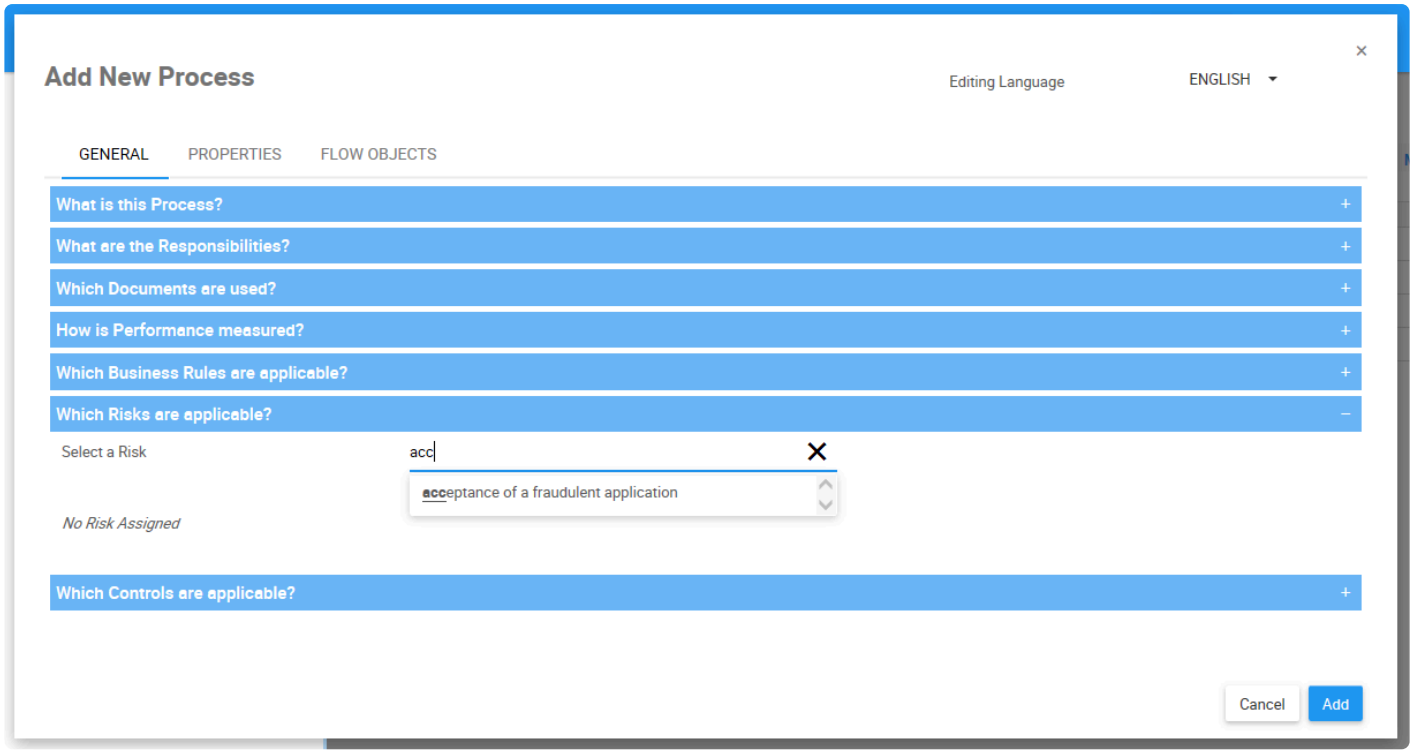


2. Search for Risks

To associate an Risk, type the **name** of the one you want to associate.

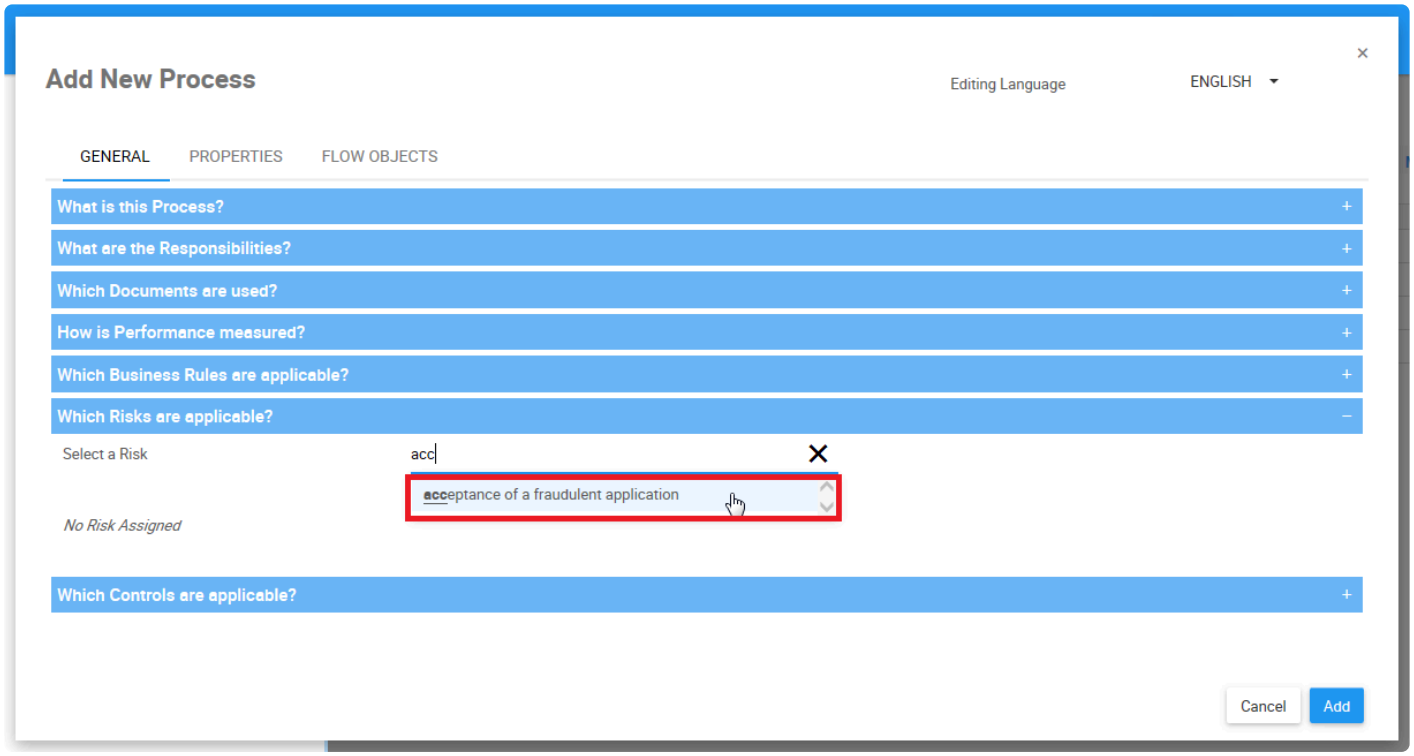


The list of suggestions will populate based on key word typing



3. Select the Risk

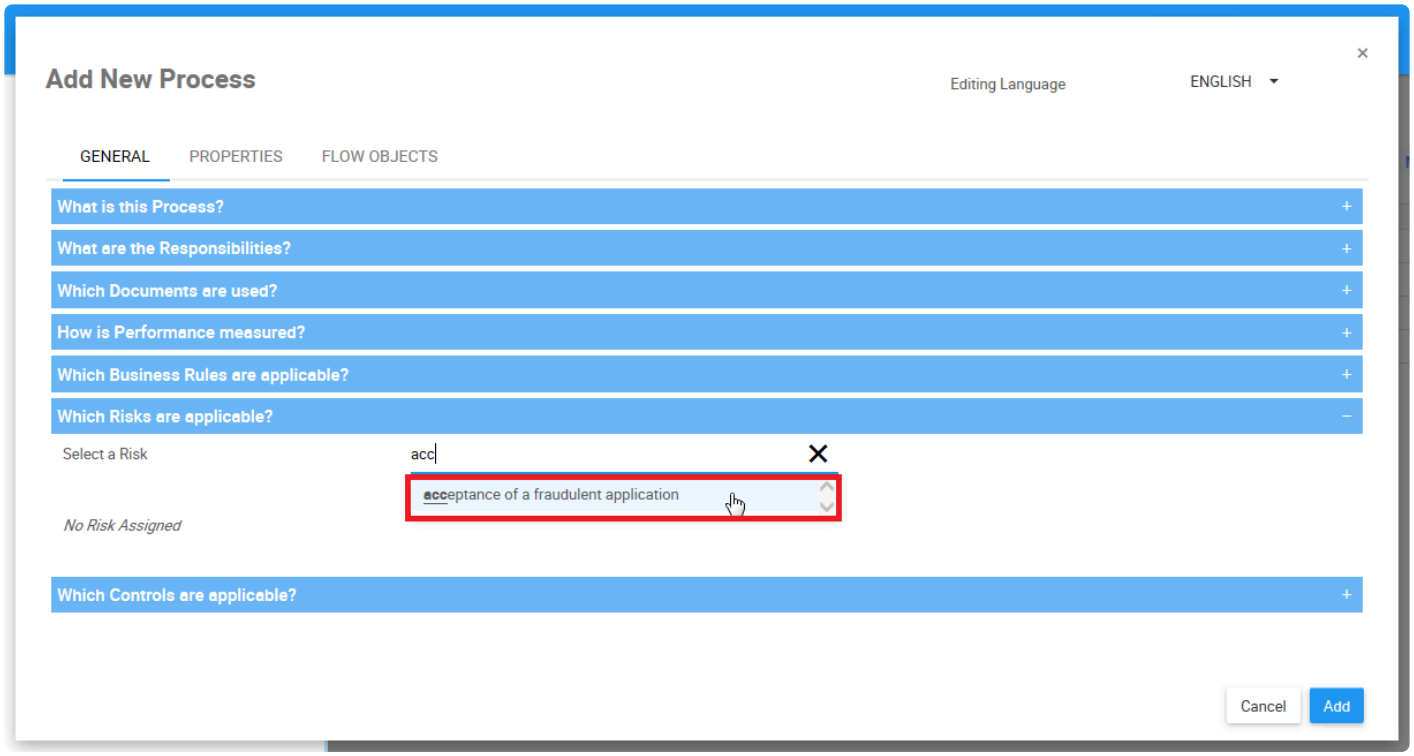
From the search suggestions, click to select the one you want to associate.



4. List of Associated Risks

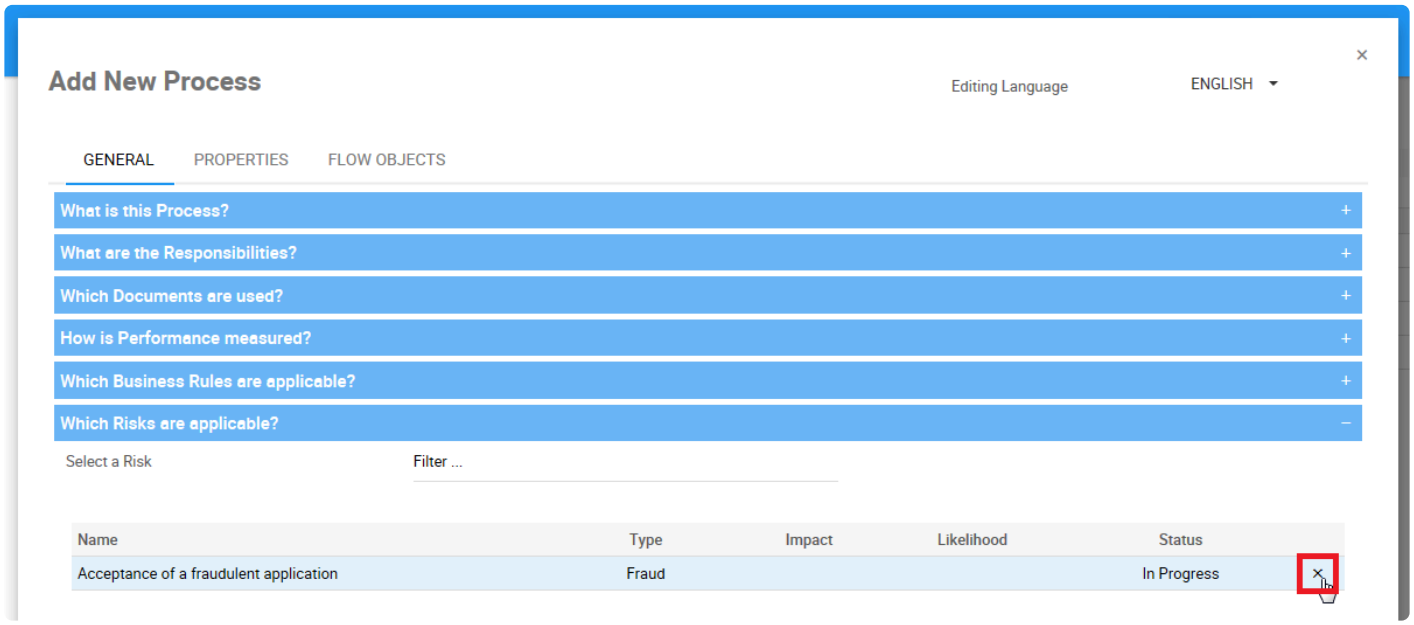
The Risks will appear in a table displaying the items name, type, impact, likelihood, and status.

> Web Modelers can associate multiple Risks to any Processes, Flow Objects (Tasks, Events, and Gateways), Rules, Performance Indicators, and Risks. Multiple Processes, Flow Objects (Tasks, Events, and Gateways), Rules, Performance Indicators, and Risks can have the same Risks.



Remove Risks

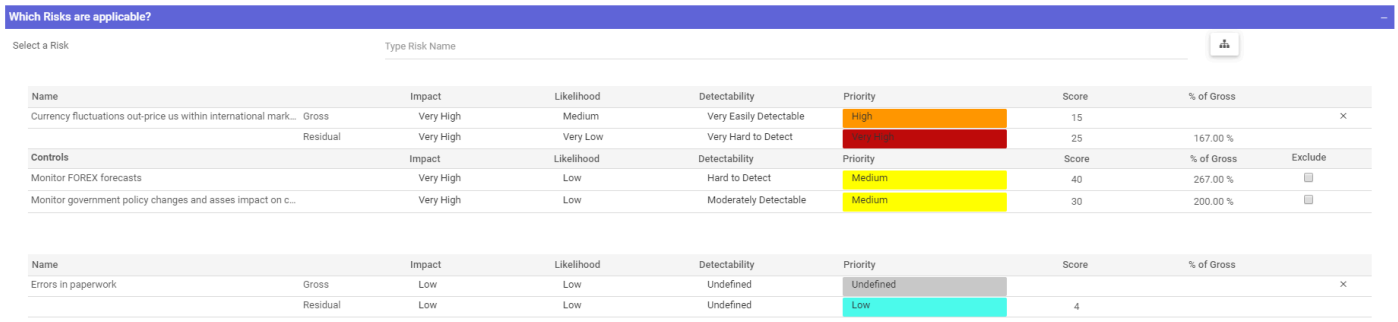
To remove the Risk from the object, click on the ✕



To create new Risks, click here

12.1.5.5.1 Associate Risks to Processes

The EPC provides enhanced Risk Association capabilities on processes. Users can associate risks, view the risk assessment, and manipulate risk scores based on circumstances. Similar risks can present themselves differently in different processes. Whether a risk is elevated on a specific process, or additional controls are present on a process, the EPC provides you with the capabilities to customize your risk assessment per process.



Users can:

[1) Associate Risks to processes]

[2) Override Residual Risk Scores]

[3) Exclude Controls applied to risks]

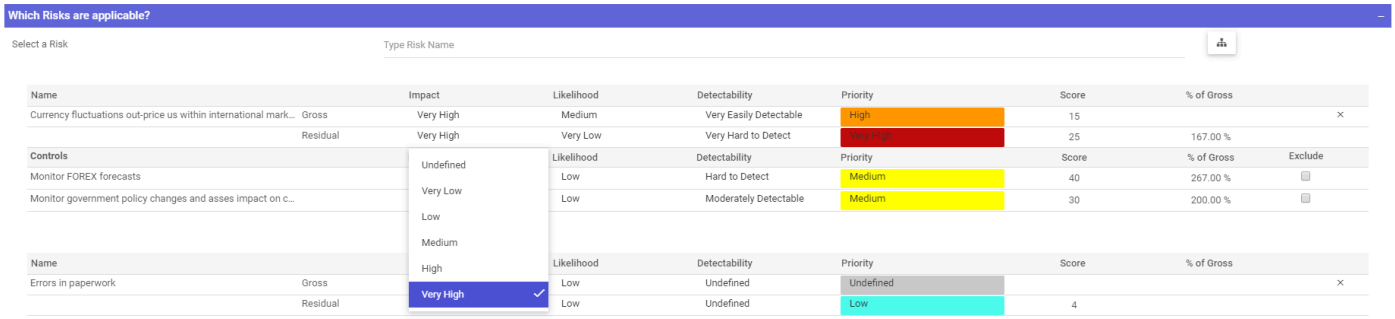
12.1.5.5.1.1 Override Residual Risk Scores (on Processes)

The Enterprise Process Center (EPC) provides users with Risk Management, Tracking, Scoring and Analysis capabilities, making the system a fully functional risk management tool. This tool allows users to create and assess Risks, as well as analyze the relationship that Risks have with Controls and Processes.

Key Definitions

Gross Risk: The risk to the company in the absence of any actions (e.g. Business Rules, Controls)
Residual Risk: The risk to the company remaining after corrective actions have been implemented to reduce the impact and likelihood, and increase the detectability of a risk within the organization
Impact (Risk): Severity of the consequences varies in terms of cost and potential loss on health, human life, or other critical factors.
Likelihood (Risk): Probability of occurrence
Detectability (Risk): The probability of detecting the fallout and/or consequences associated with the Risk

In cases where users desire to set their own Residual Risk Scores (disagree with system score), users can manually override the system generated score and set their own respective Residual Impact, Likelihood and Detectability scores. To do so, users will have to click on the section they wish to override (Impact, Likelihood or Detectability) and select the new value they wish to apply. This will, in turn, adjust the calculated score.



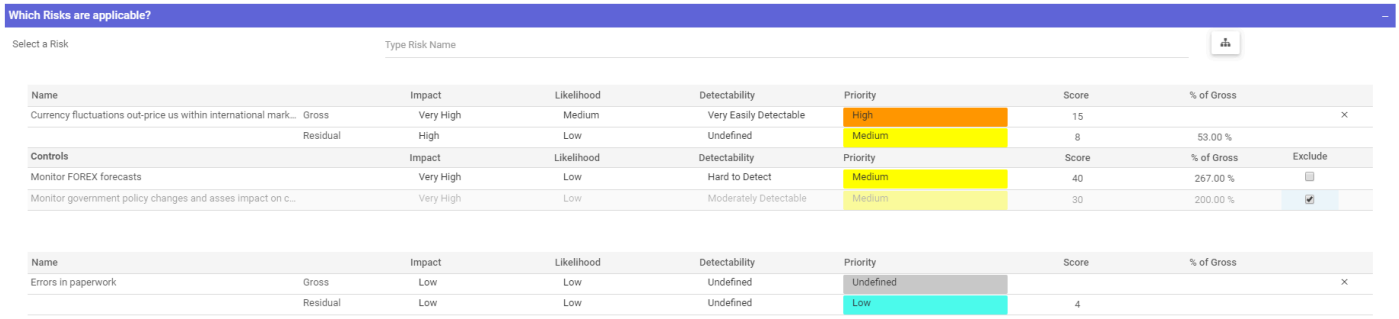
12.1.5.5.1.2 Exclude Controls (on Processes)

The Enterprise Process Center (EPC) provides users with Risk Management, Tracking, Scoring and Analysis capabilities, making the system a fully functional risk management tool. This tool allows users to create and assess Risks, as well as analyze the relationship that Risks have with Controls and Processes.

Key Definitions

Gross Risk: The risk to the company in the absence of any actions (e.g. Business Rules, Controls)
Residual Risk: The risk to the company remaining after corrective actions have been implemented to reduce the impact and likelihood, and increase the detectability of a risk within the organization
Impact (Risk): Severity of the consequences varies in terms of cost and potential loss on health, human life, or other critical factors.
Likelihood (Risk): Probability of occurrence
Detectability (Risk): The probability of detecting the fallout and/or consequences associated with the Risk

In cases where controls may or may not apply to a risk on a specific process, users can select the **Exclude** checkbox. This will disable the control and will remove it from the aggregate residual risk score.



Note that excluding controls will not remove the association on the risk itself, it will merely exclude the control from the risk on the **specific process**

12.1.5.6 Associate Controls

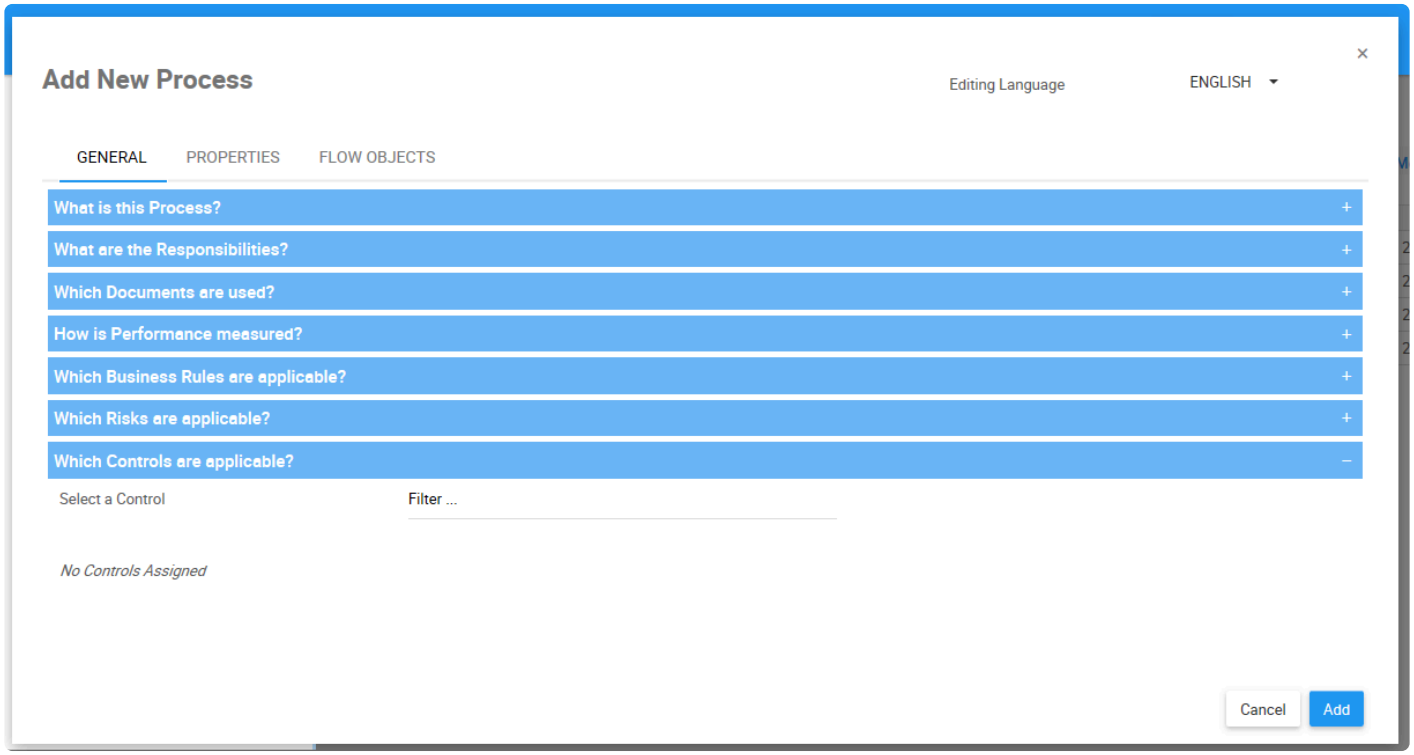
Controls

Controls are used to mitigate Risk. They can be associated to Processes or Flow Objects (Tasks, Events, and Gateways), and Performance Indicators (KCI, KPI, KRI), .Controls are created and managed within the Control module. Under this sub-section of the General Details, Web Modelers can associate Controls to specific Processes, Flow Objects, and Performance Indicators where they apply.

This section is available within the edit form of Processes, Flow Objects, and Performance Indicators.

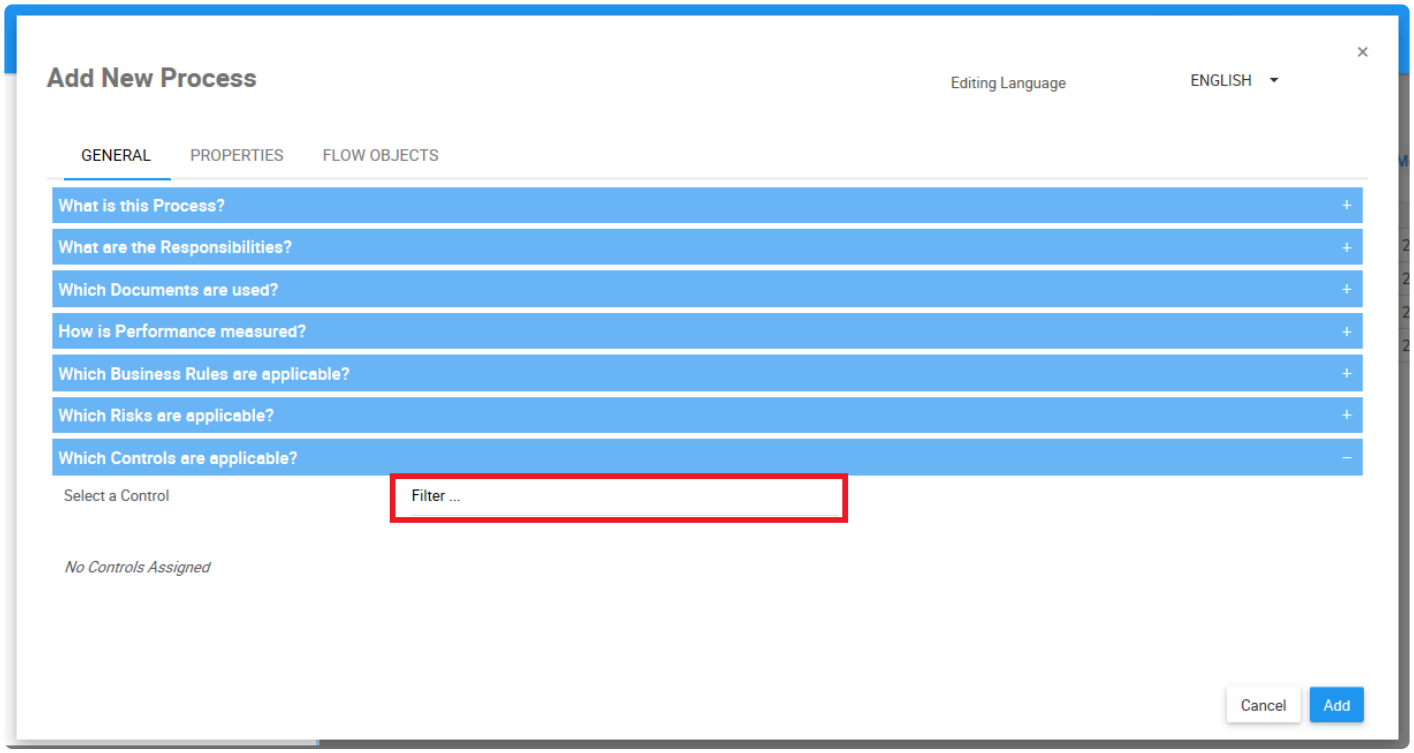
Associate Controls

1. Navigate to the “Which Controls are applicable?” section and click on the + icon to expand the section.

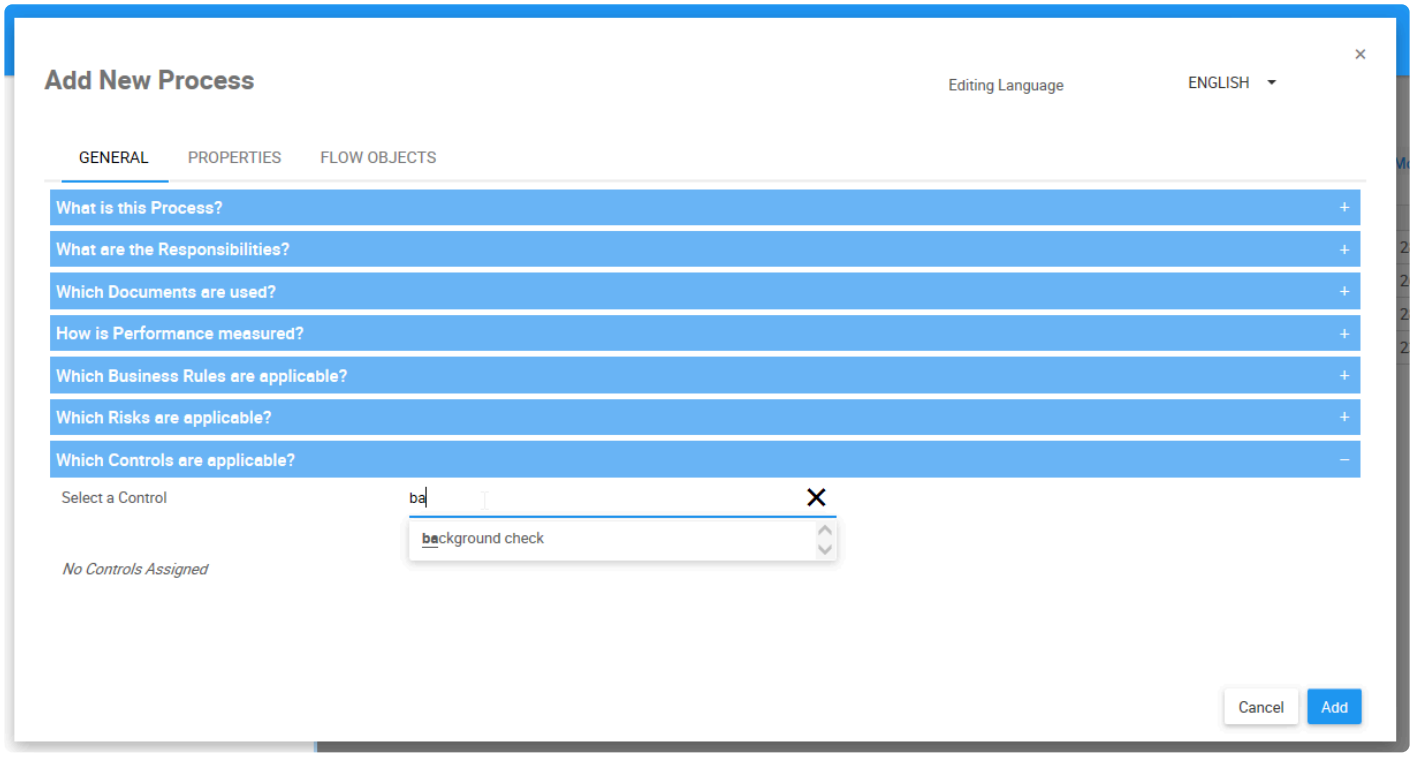


2. Search for Controls

To associate a Control, type the **name** of the one you want to associate.

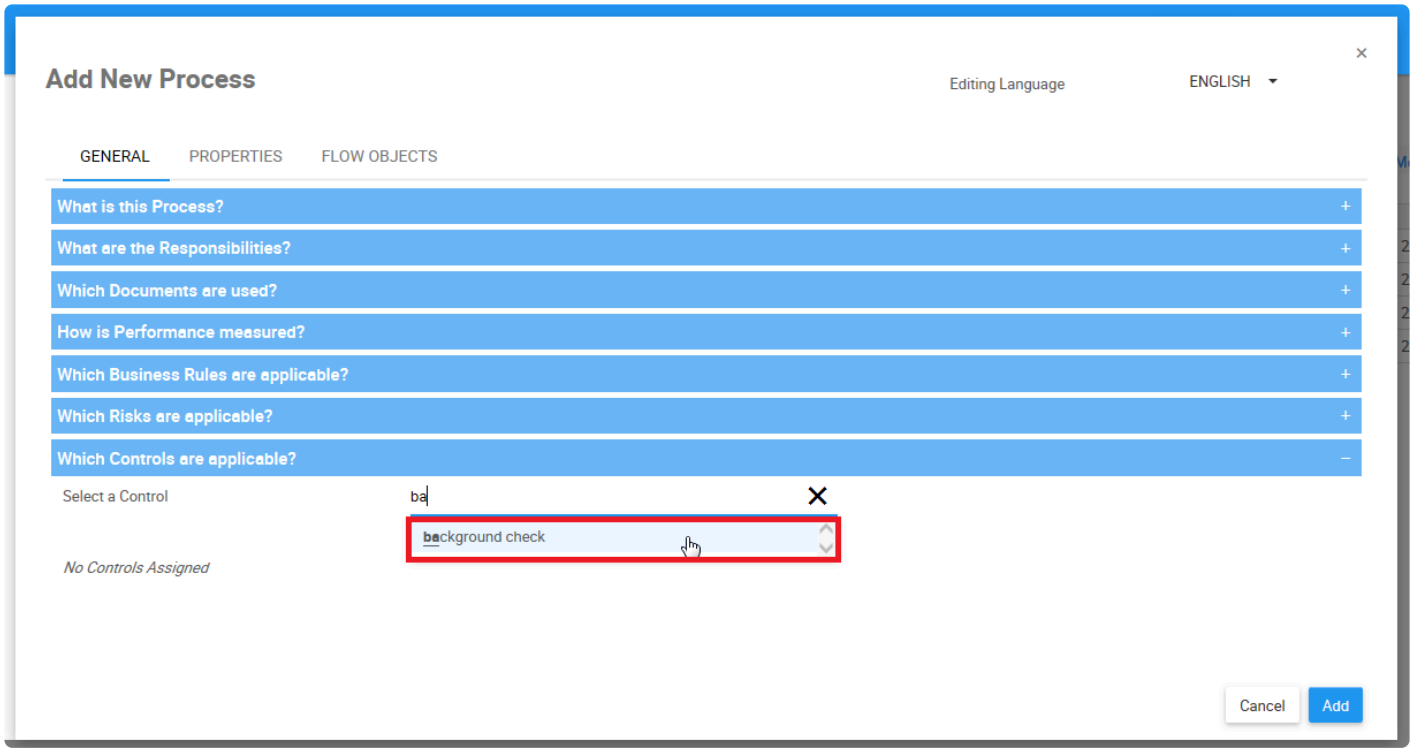


The list of suggestions will populate based on key word typing



3. Select the Control

From the search suggestions, click to select the one you want to associate.



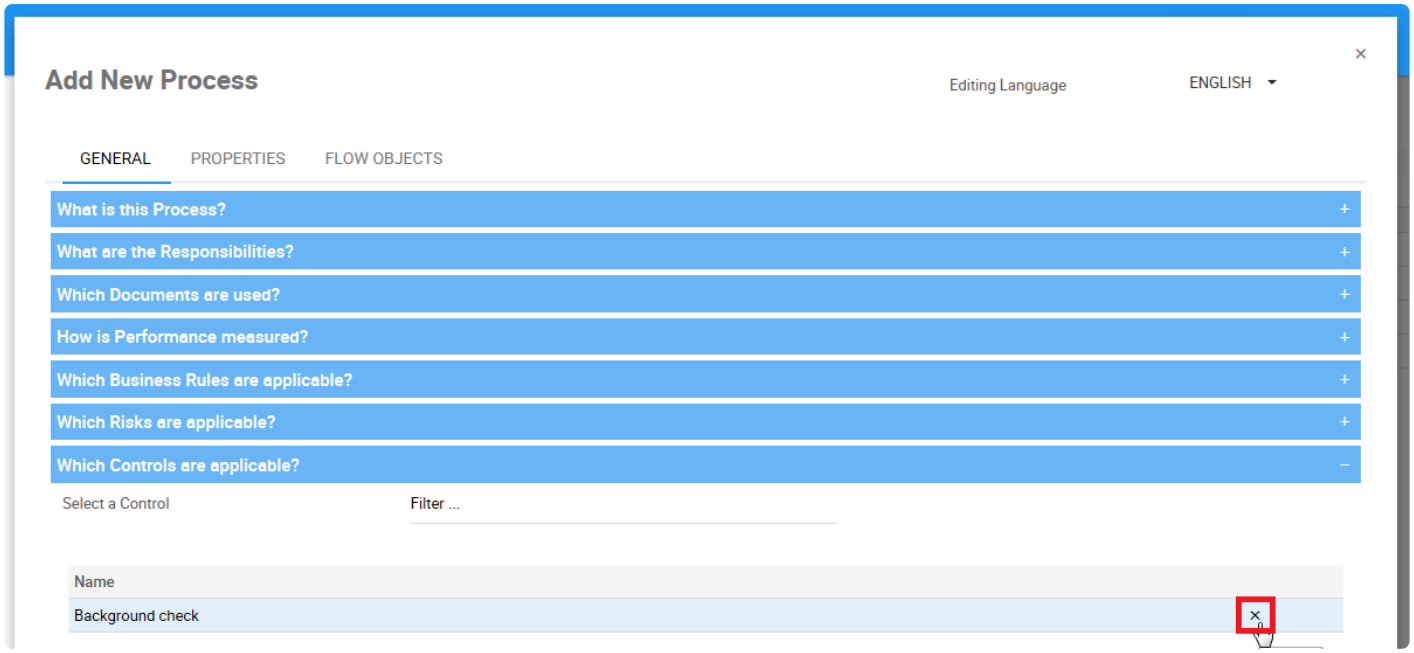
4. List of Associated Controls

The Controls will appear in a table displaying the items name, type, and status.

> Web Modelers can add multiple Controls to any Process, Flow Object, or Performance Indicator, and many Processes, Flow Objects, and Performance Indicators can have the same Contols.

Remove Controls

To remove the Control from the process, click on the ×



To create new Controls, click here

12.1.5.7 Assign Parent

First say how you can choose by selecting in the tree structure

then you can use select a parent button in the edit window to change parent

then you can also “MOVE” an object

12.1.5.8 Associate Master Data Objects

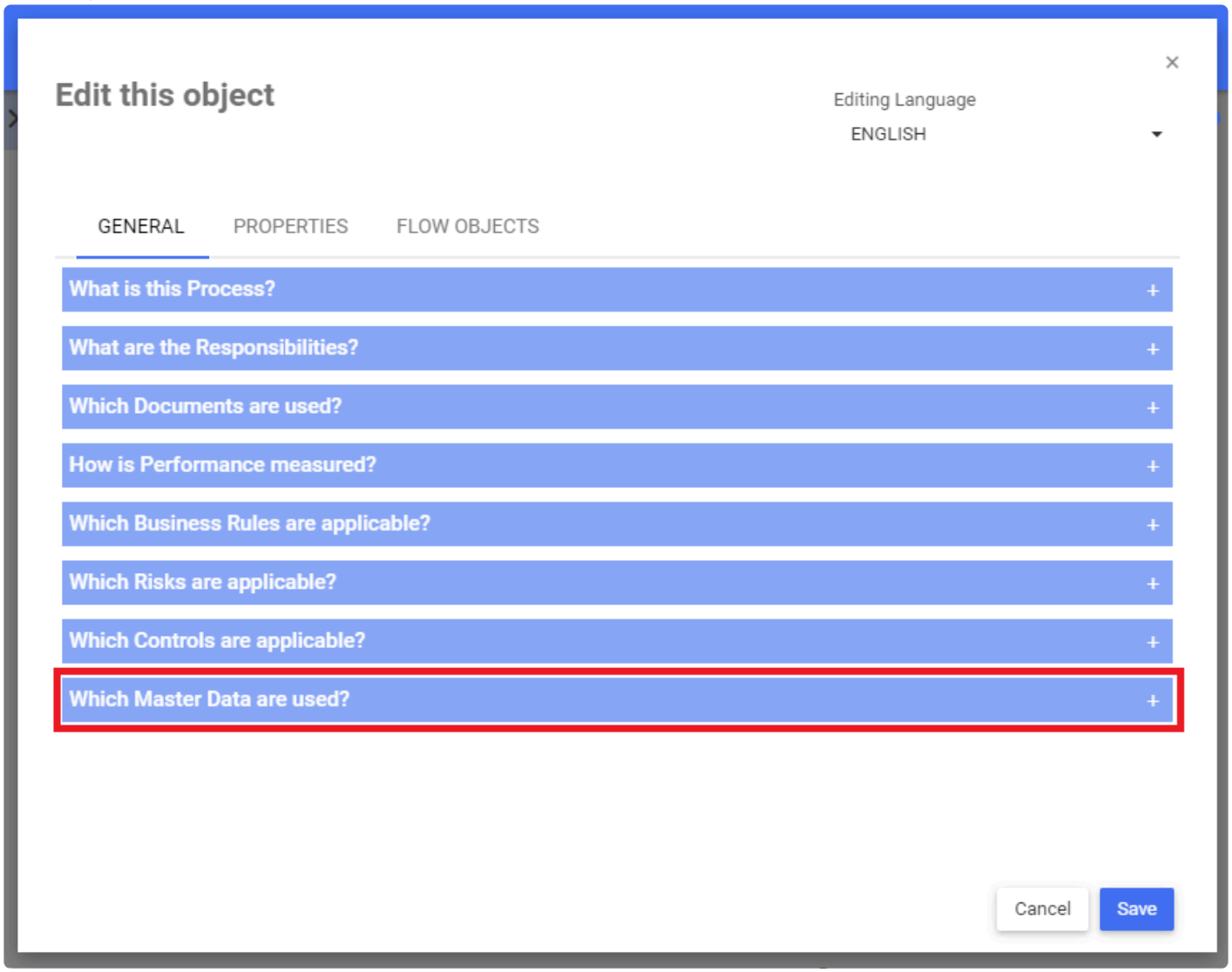
Users can now assign Entities and Attributes directly to processes and flow objects, to help map data flow, information transfer, etc. Additionally, users have the ability to assign responsibility and clearance on these master data objects following the CRUD Methodology:

- C – Create
- R – Read
- U – Update
- D – Delete

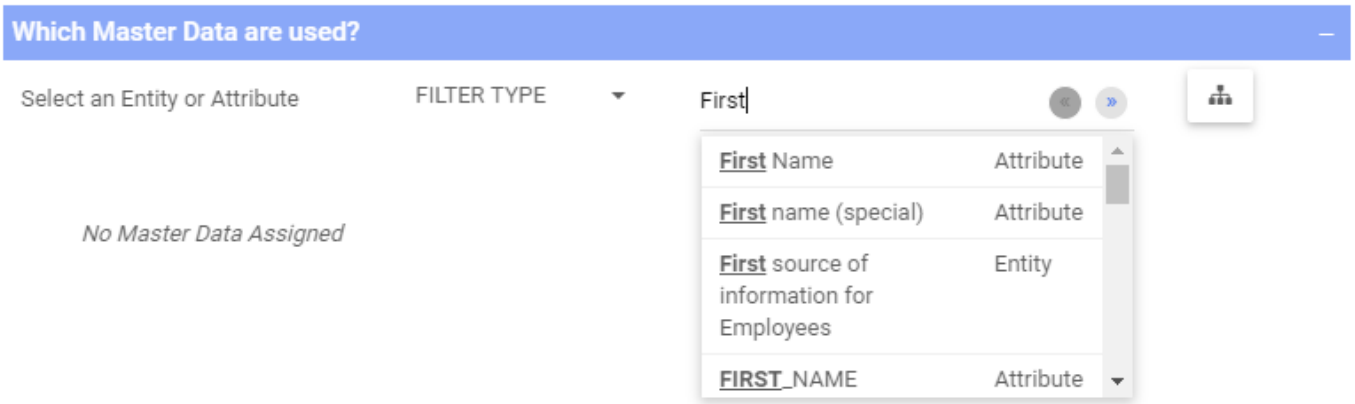
These changes are made within process & flow shape edits forms.

Within the Edit forms for both processes and objects:

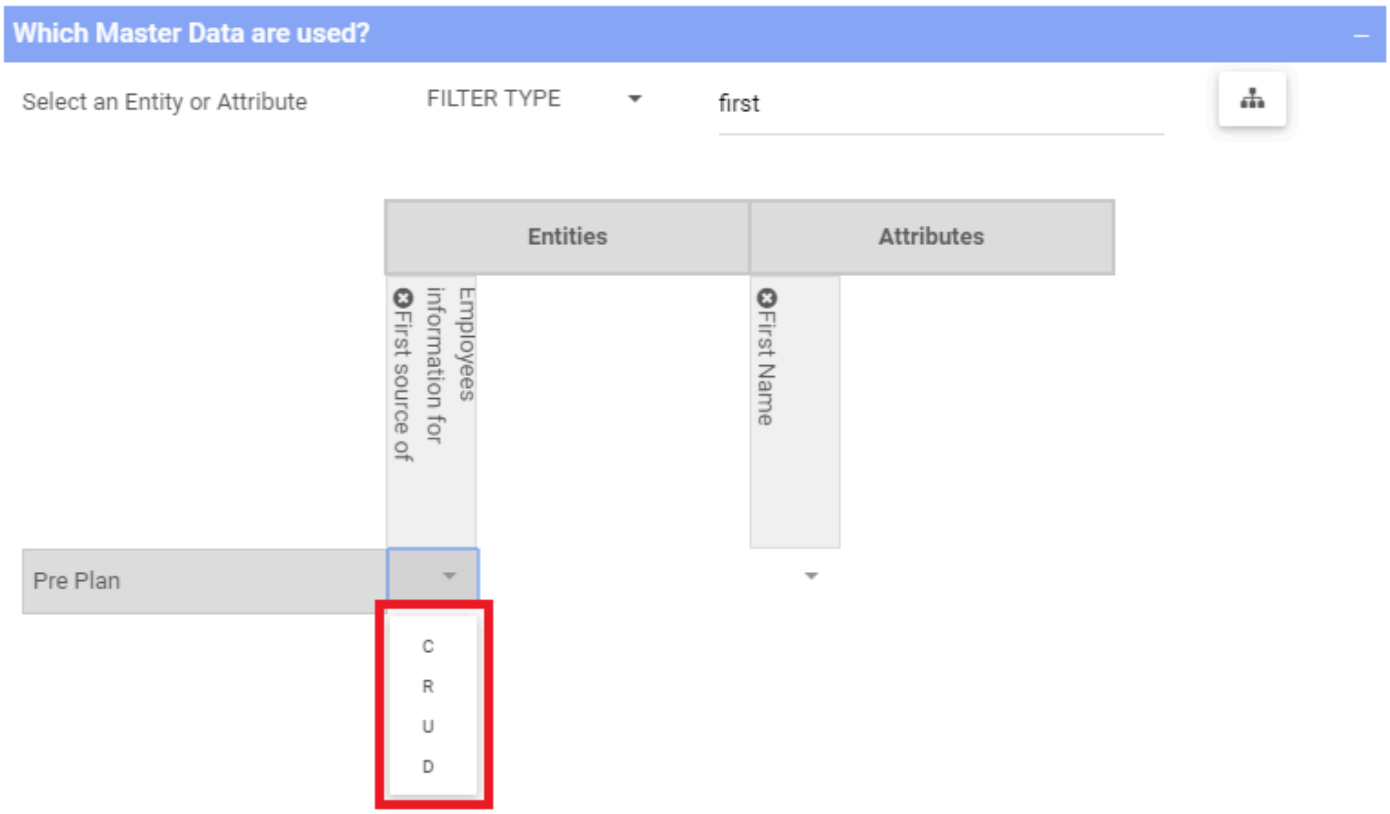
1) Navigate to the “Which Master Data is Used” Section



2) Type in the desired object or use the **Parent Selector**



3) Within the available dropdown, select the appropriate CRUD designation.



Note that multiple designations can be selected.

12.1.6 Properties

The Properties tab is common to all objects (excluding Sets and Folders). There are some object-specific sections in the properties tab, the instructions for those are found on the object-specific *Edit [Object] Properties Details* section of the manual.

To edit Properties, Web Modelers need to navigate to the Edit button in the Details tab of the object to access the Edit Details window.

The sections in the Properties tab serve to define *unique* characteristics about the objects. Instructions for the common Properties sections are in the following sub-sections.

- Object Type
- Object Categories
- Object Attributes
- Object Association Strictness/Control Level
- Requirements and Acceptance Criteria

12.1.6.1 Object Type

The Object Type serves as a quick way to classify an object based on a business type. EPC comes pre-loaded with a list of types for each object, but System Administrators can create and customize Object Types.

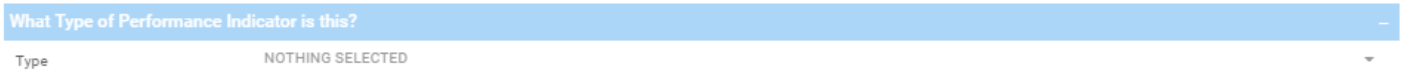
> If you are a System Administrator and would like to customize Object Types, you can find the instructions in the Object Types section of System Admin instructions.

Select an Object Type

In the drop-down menu, find and select the desired Object Type. (for this example, the “Financial” Obejct Type will be selected for a Performance Indicator)

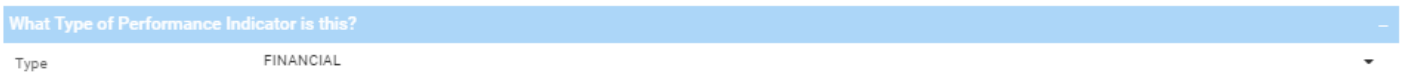
> One Object Type can be defined for each object.

1. Navigate to the Type box



2. Click on the Type box, a drop-down will be generated

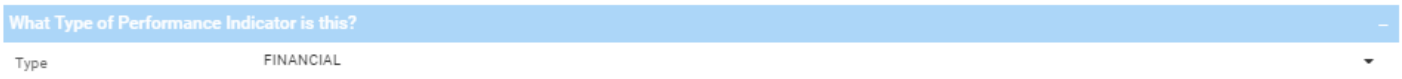
3. Select the type. In this example, Financial



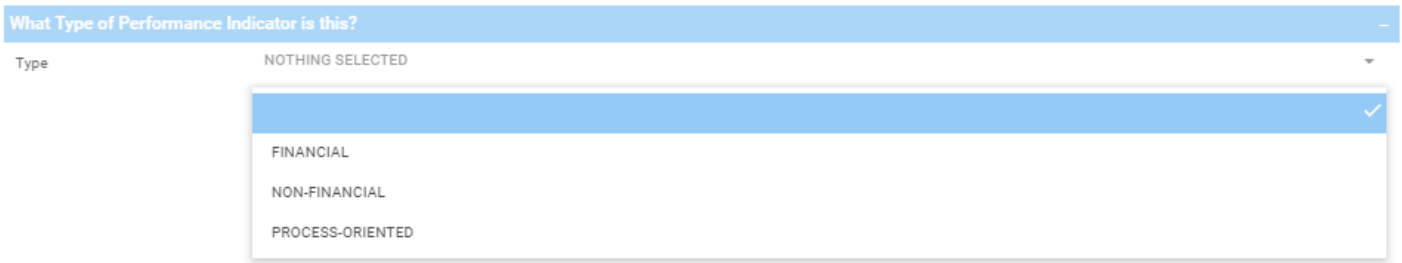
Remove Object Type

If you want to remove the Object Type, select the *blank* option at the top of the list in the drop-down menu.

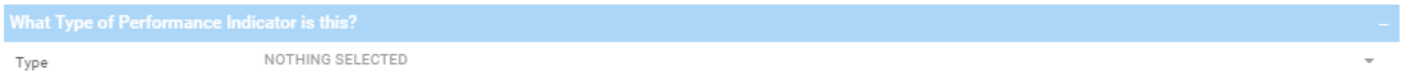
1. Navigate to the Type box



2. Click on the Type box, a drop-down will be generated



3. Select the blank box to remove the object type, and have nothing selected



12.1.6.2 Object Categories

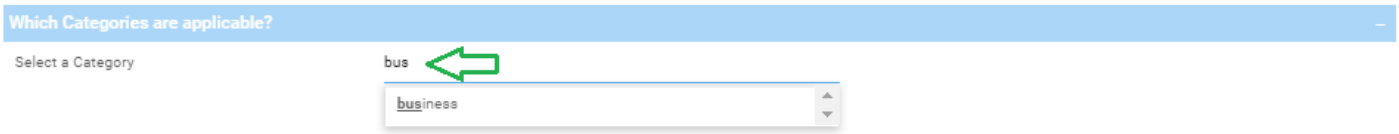
Object Categories serves as a quick way to classify an object based on various business Categories. EPC comes pre-loaded with a list of Categories for each object, but System Administrators can create and customize Object Categories.

> If you are a System Administrator and would like to customize Object Categories, you can find the instructions in the Categories section of System Admin instructions.

Add Categories

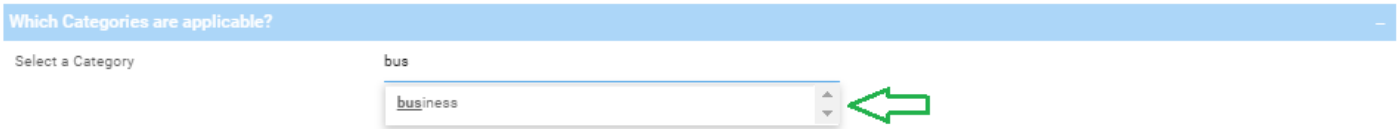
1. Search for the Category

To find a Category, type the **name** of the desired category. (for this example the “Business” category will be added)



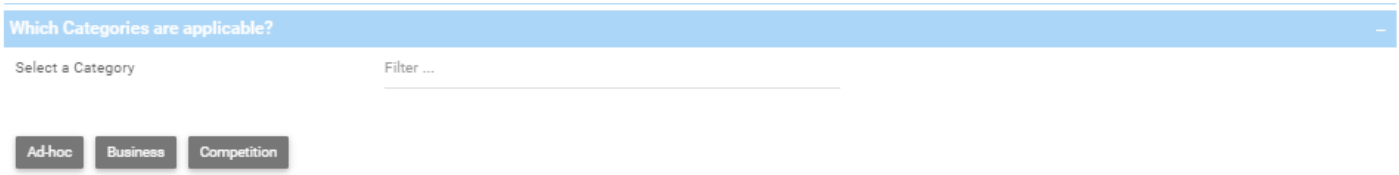
2. Select the Category

From the search suggestions, click to select the Category you want to add.



3. Collection of selected Categories

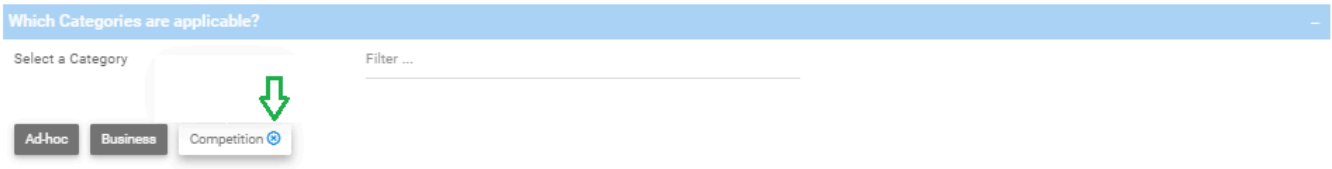
The Categories will appear in a collection of Category names, in alphanumerical order from left-to-right, below the search field. (for this example, the object has the “Ad-hoc”, “Business”, and “Competition” categories)



Remove Categories

To remove categories:

1. Hover on the Category to be removed
2. Click the “X” to remove it.



12.1.6.3 Object Attributes

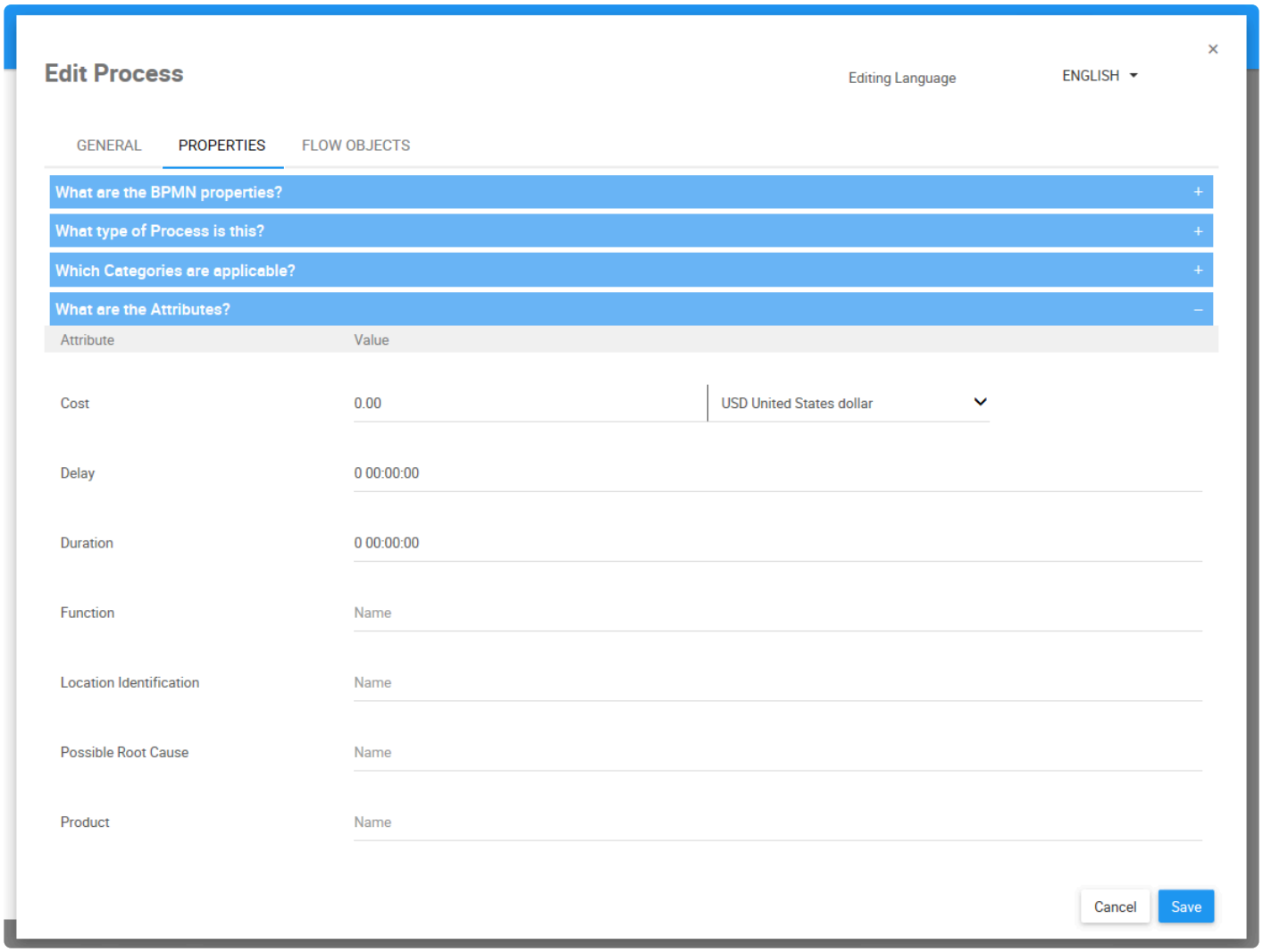
The Object Attributes serves as a quick way to classify an object based on a piece of data assigned by the Web Modeler. Attributes are used to add a layer of classification for items. EPC comes pre-loaded with a list of attributes for each object, but System Administrators can create and customize Object Attributes.

Object attributes types are **Currency**, **Duration**, **Drop-Down – Multi-Select**, **Drop-Down – Single-Select**, **Number** and **Text**.

> If you are a System Administrator and would like to customize Object Attributes, you can find the instructions in the Attributes section of System Admin instructions.

Assign Object Attributes

1. Navigate to the Properties tab in the Details Edit window of an object

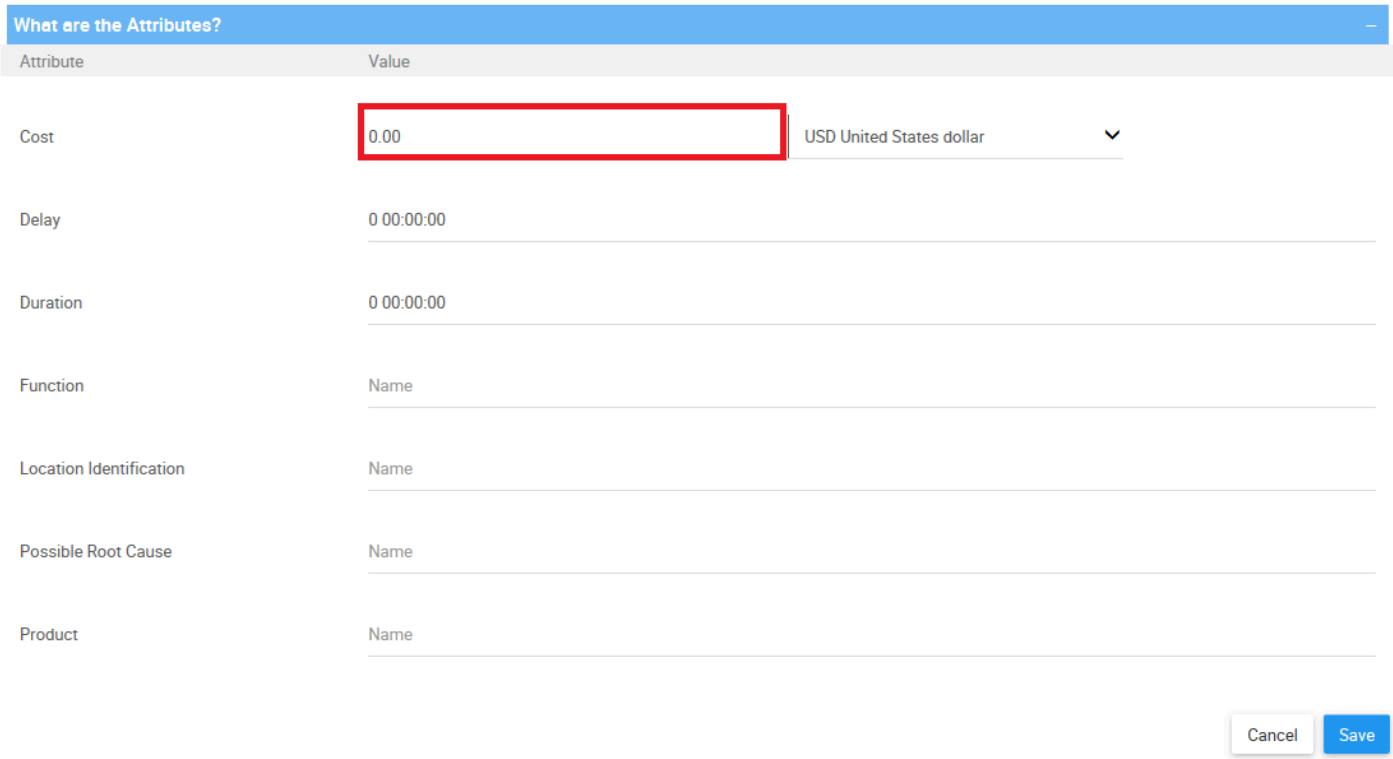


2. Assign a Currency Object Attribute

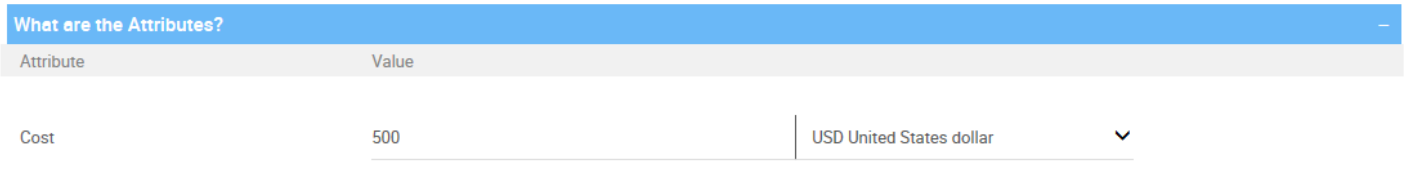
System Admins can add and customize Object Attributes with a Currency type.

The currency type is a numerical value

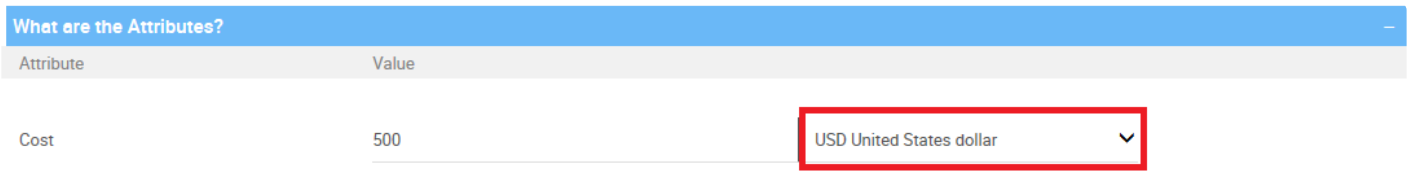
1. Navigate to an Object Attribute with a Currency type. In this example, navigate to the “Cost” field



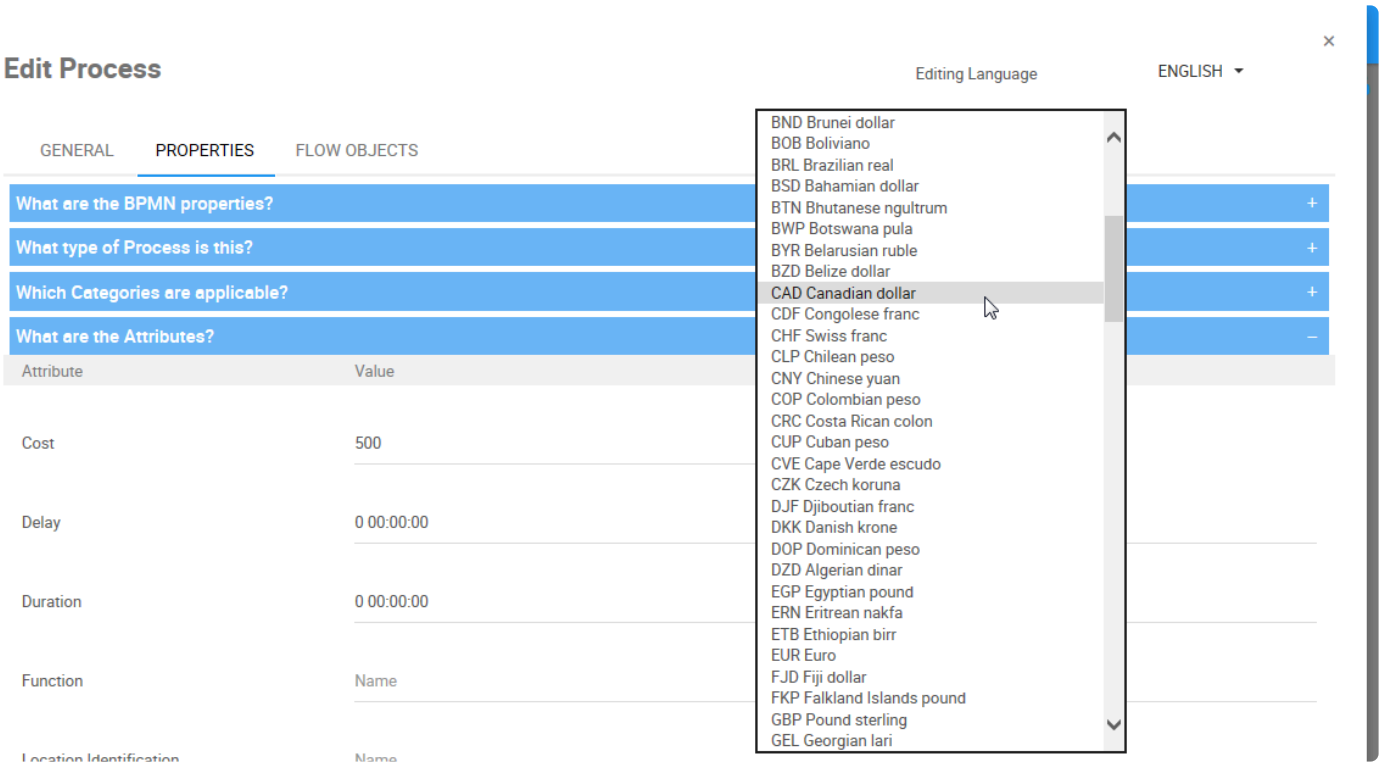
2. Input the cost for the Object. In this example, the cost of executing a process is $500



3. Navigate to the currency drop-down



4. A drop-down will be generated. Select the currency for the cost of the process

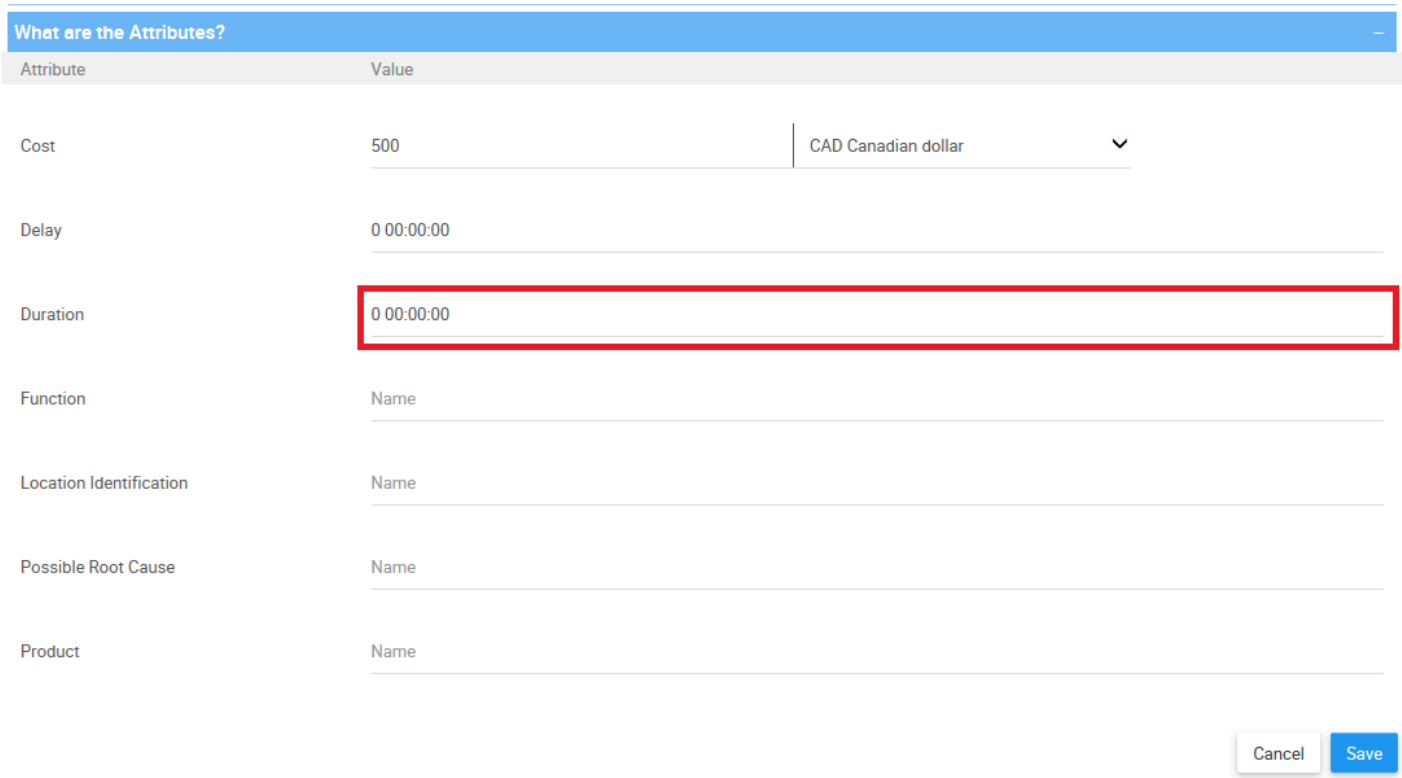


3. Assign a Duration Object Attribute

System Admins can add and customize Object Attributes with a Duration type.

The duration type is a numerical value

1. Navigate to an Object Attribute with a Duration type. In this example, navigate to the “Duration” field



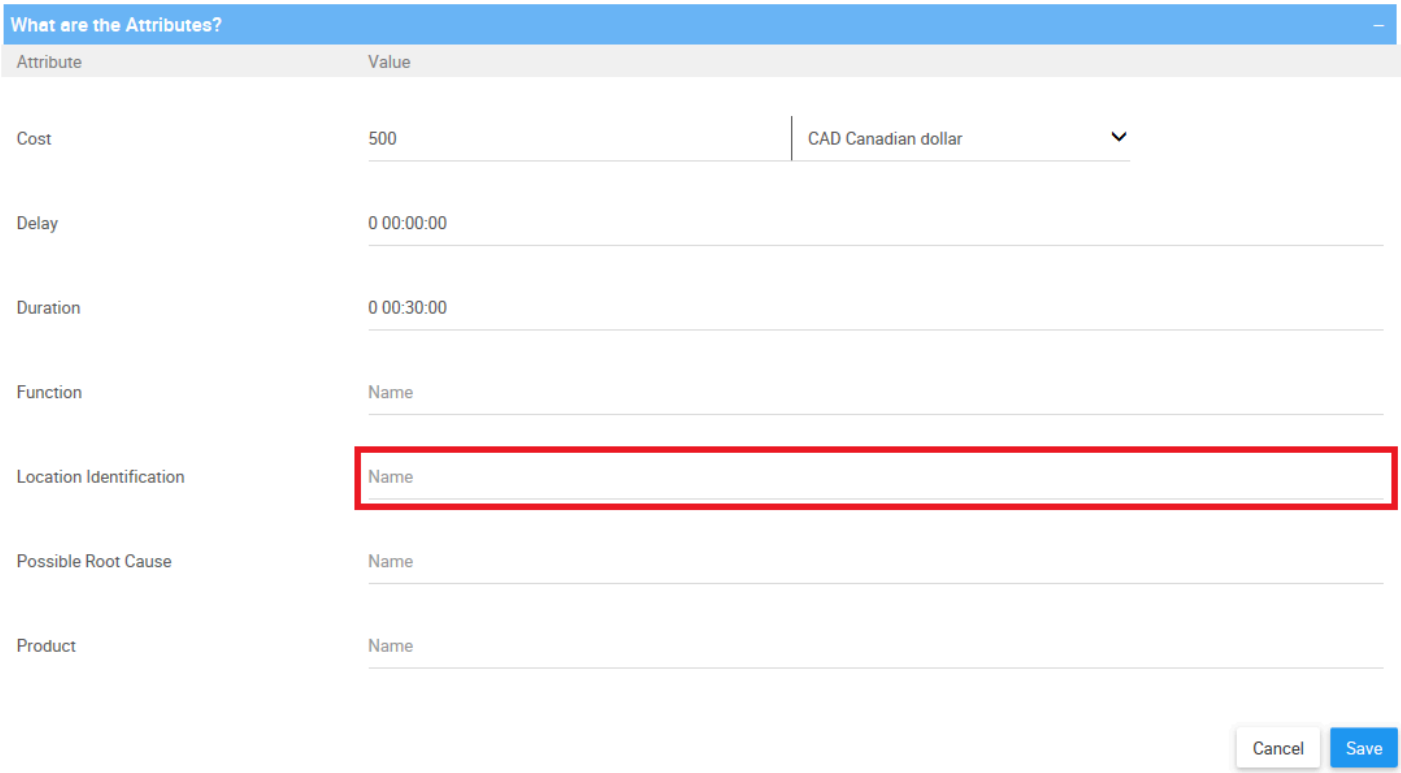
2. Type the Duration for the Object. In this example, the duration of executing a process is 30 minutes

4. Assign a Number Object Attribute

System Admins can add and customize Object Attributes with a Number type.

The number type is a numerical value only. Letters and other symbols are disabled for this Attribute type.

1. Navigate to an Object Attribute with a Number type. In this example, navigate to the “Location Identification” field



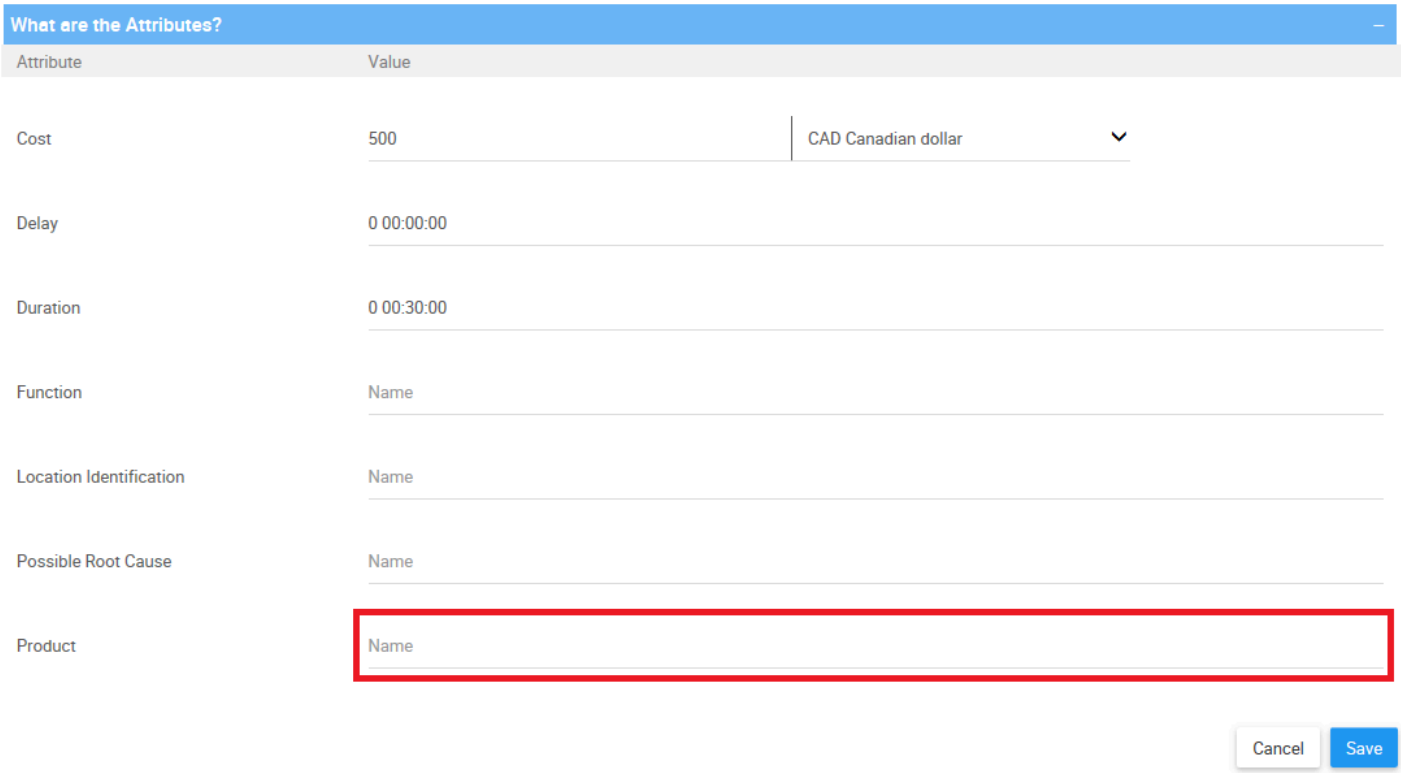
2. Type the Number for the Object In this example, the location number 332

5. Assign a Text Object Attribute

System Admins can add and customize Object Attributes with a Text type.

The text type can be letters and numbers

1. Navigate to an Object Attribute with a Text type. In this example, navigate to the “Product” field



2. Type the Text for the Object. In this example, the name of the product in this process is “Material I-233”

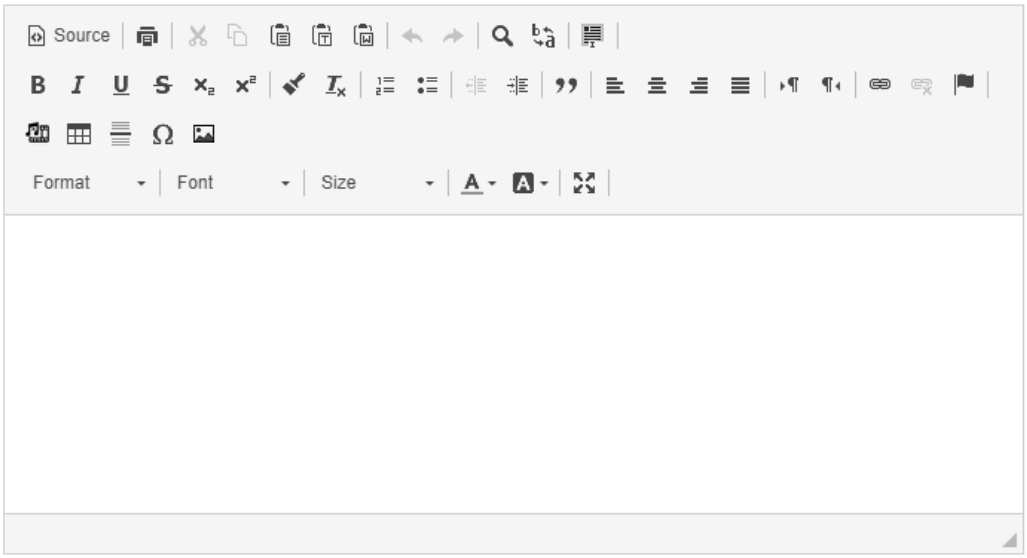
6. Assign a Rich Text Object Attribute

System Admins can add and customize Object Attributes with a Richtext type.

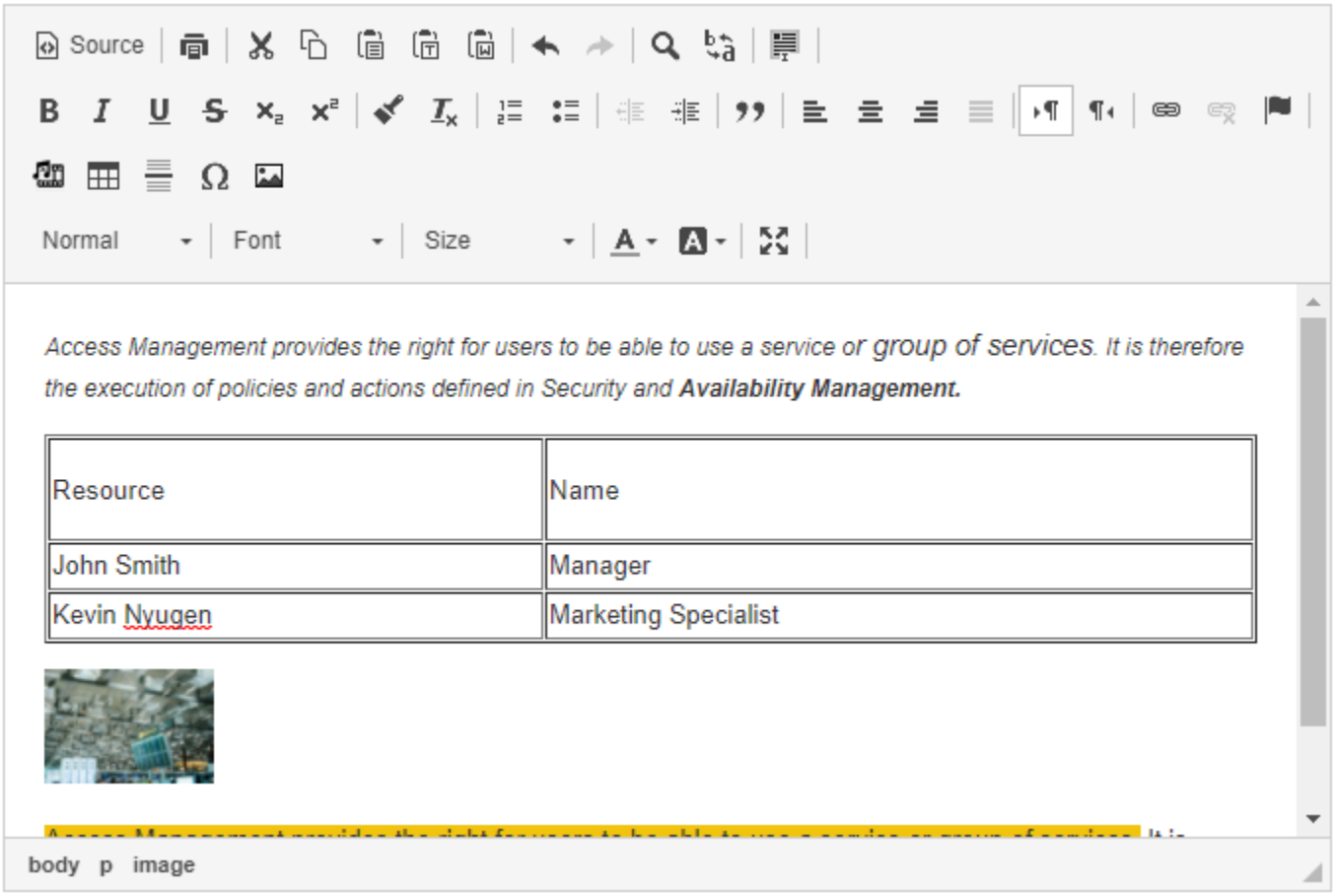
The text can have variety font sizes, font style (e.g., bold, italic), colors, table and many more.

1. Navigate to an Object Attribute with a Richtext type. In this example, navigate to the “Product” field

Product



2. Type the Text, add an image and a table”

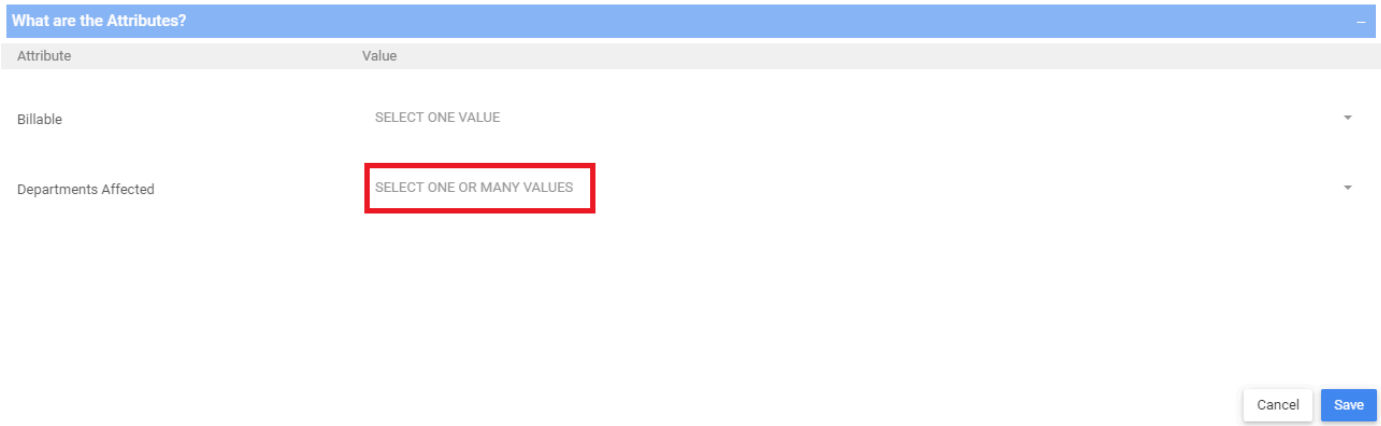


7. Assign a Drop-Down – Multi-Select Object Attribute

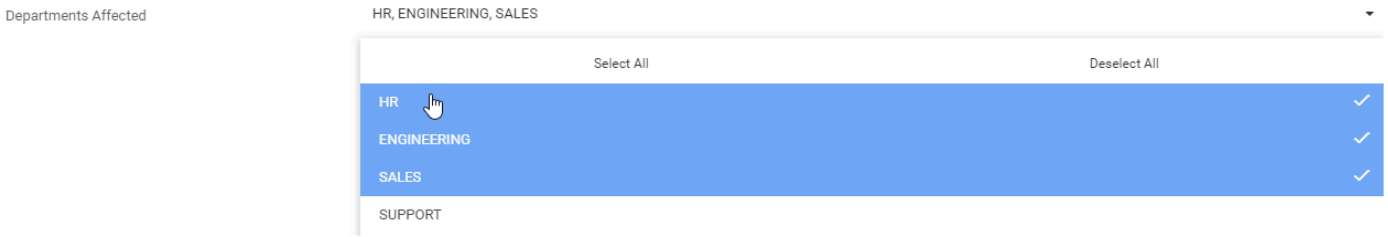
System Admins can add and customize Object Attributes with a Drop-Down – Multi-Select type.

Drop-Down – Multi-Select type can be letters and numbers

1. Navigate to an Object Attribute with a Drop-Down – Multi-Select type. Click on the “Select one or many values” field.



2. Select one or multiple values by clicking on their name, and deselect them by clicking on them a second time. You can also select all the values by clicking on “Select All”, and deselect all the values by clicking on “Deselect All”

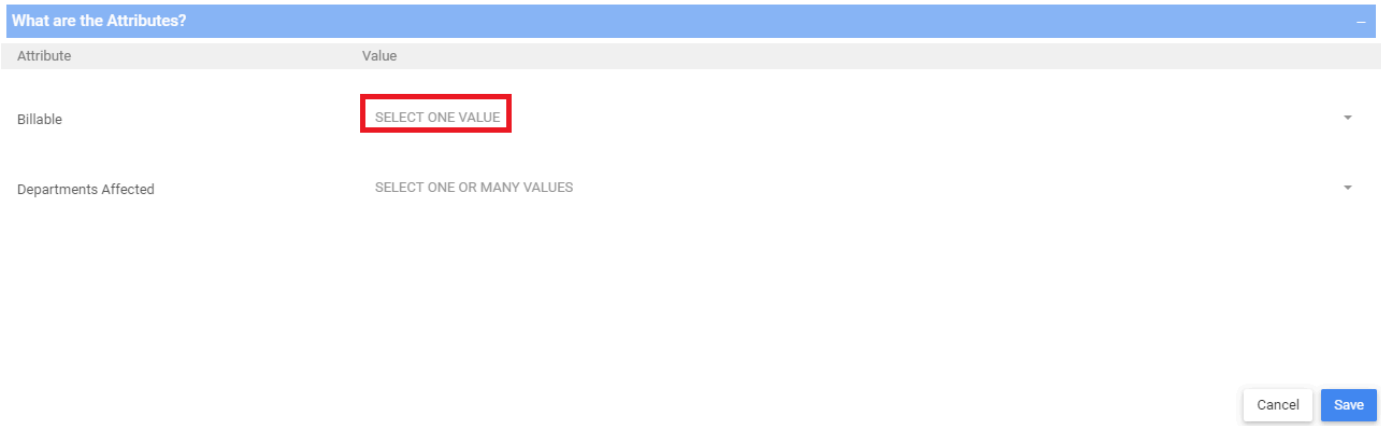


8. Assign a Drop-Down – Single-Select Object Attribute

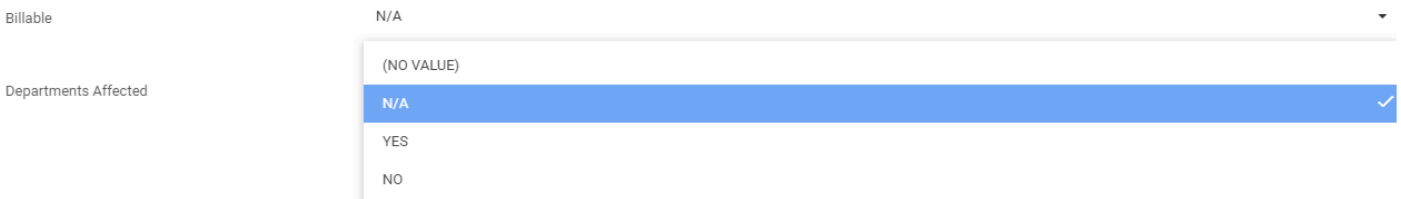
System Admins can add and customize Object Attributes with a Drop-Down – Single-Select type.

Drop-Down – Multi-Select type can be letters and numbers

1. Navigate to an Object Attribute with a Drop-Down – Single-Select type. Click on the “Select one value” field.



2. Select one value by clicking on its name. To select another value, you can click on the other value’s name, and it will replace the first value. The (No Value) option allows you to select none of the options.



12.1.6.4 Data Harmonization

Users can specify how much control the user has over an object's associations. There are 3 degrees of control strictness to choose from:

- **High** (Never Harmonize Major and/or Minor Changes)
- **Medium** (Only Harmonize Minor Changes)
- **Low** (Always Harmonize Major and/or Minor Changes)

A strict object indicates that an object's association versions is frozen upon a status change (sent for review -> approved -> published). Strict objects mean that when there is an approval or a publication, we are pointing the version of the object to the version of the associated object that was "approved" for use. We are "freezing" the process' associated object's versions.

High Control

When an object is designed as "High Control", or "Never Harmonize Major and/or Minor Changes", the user has a high degree of control over an object's associations. Minor or Major publication of associated objects will never be synced automatically.

Medium Control

When an object is designated as "Medium Control" or "Only Harmonize Minor Changes", major publication of associated objects will render the object as "Out of Synx". Any minor publications will be automatically updated by EPC.

Low Control

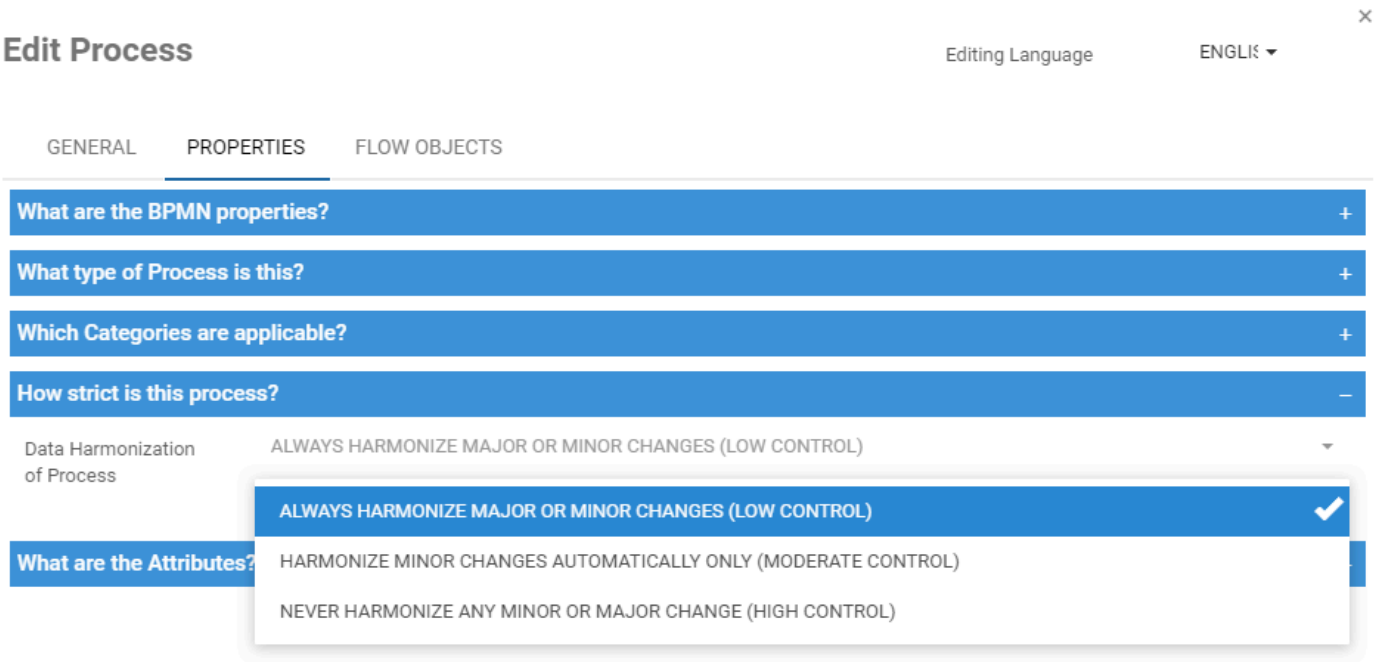
This is the default setting for all objects. Major or minor publication of an object's associations will always be automatically updated without notifying the user.

Setting the Control Level

To set processes' control level, follow these steps

1. Edit a process

2. Under the **Properties** tab, find the section labelled **How Strict is this Process?** and set the desired control level

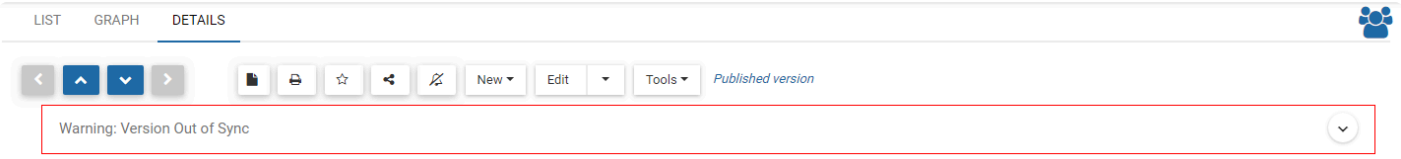


If you do not see the section, Data Harmonization has not been enabled. Refer to this section for more information.

12.1.6.4.1 Out of Sync

The harmonization setting can allow a better control of processes. It allows keeping the associations linked to a process as they were on that specific version, even if the association has a more recent version.

By selecting a level of strictness on a process, changes done on associations linked to the process will put the process to an Out of Sync status, showed as a box on the details page.



For this Out of Sync box to be displayed:

1. The process must be set to a Moderate or High level of strictness/control
2. The process must be either Published or in an Approval Cycle.
3. At least one association must have a new published version.

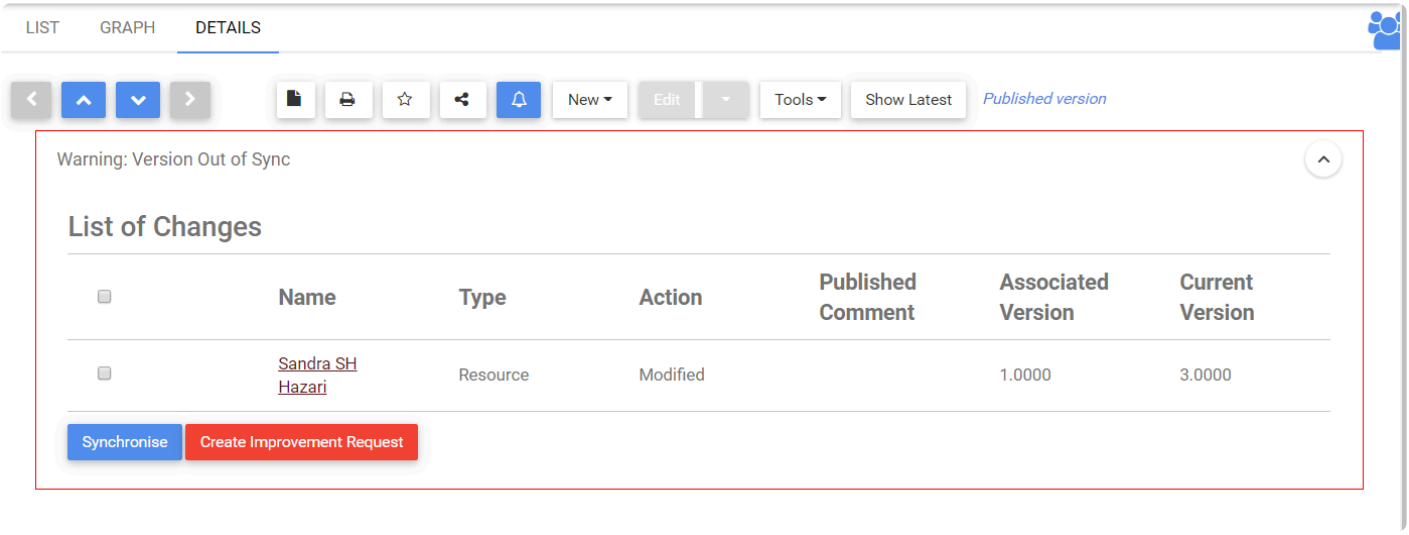
For example, for the process above, it was published to version 4.000 with a document on version 2.000. However, the document is changed and re-published to version 3.000. The process is now out of sync

The box contains actions that can be done on the Out of Sync version. It will be removed from the details page after a new Draft version is included.

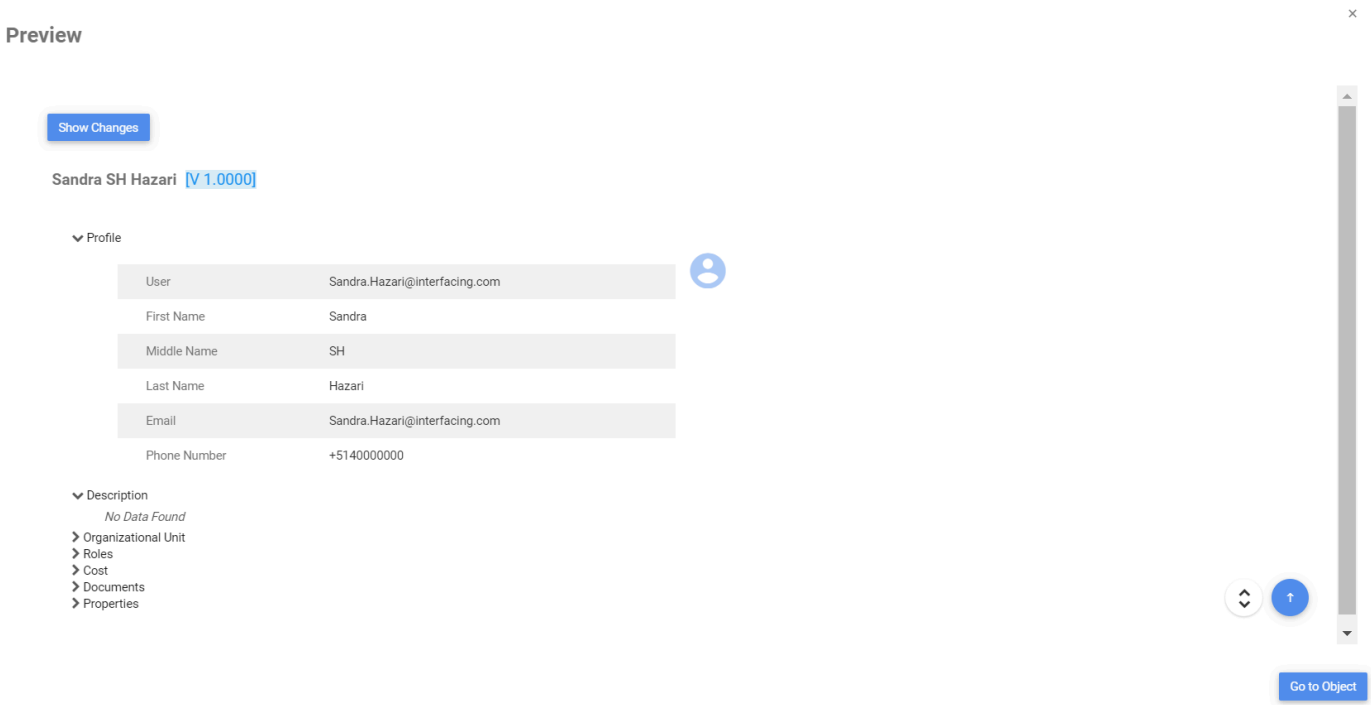
Preview & Show Changes

Additionally, a user who is on an Out-of-Sync process can view and compare the list of changed objects with their respective older version when clicking on the object's name. A preview will first appear and if a user desires to see the comparison with a previous published version of the object, they simply need to select the "Show Changes" button. See the steps below.

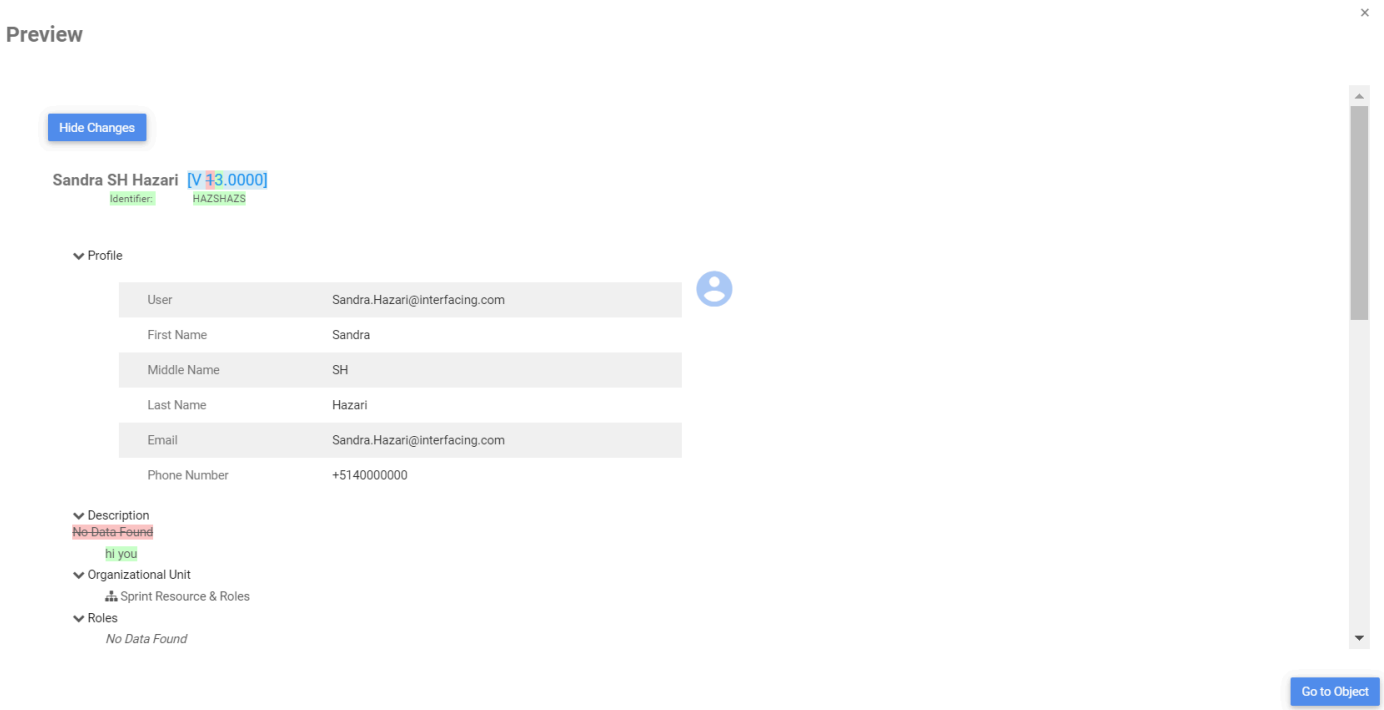
1. Select the object



2. Click on the name to see the preview



3. Select the Show Changes button to view the comparison between published versions

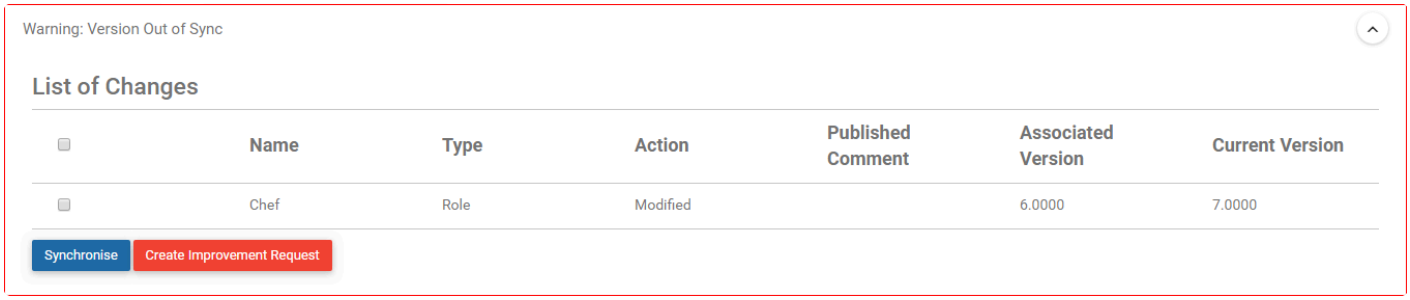


4. Select “Hide Changes” to return to the preview window

12.1.6.4.2 List of Changes

This list can be found when you expand the Out of Sync box. See Out of Sync for more information.

The list includes all associations and sub-processes that have been modified and published after the main process has been Published or sent for Approval. The list displays these elements:



Column	Description
Name	Name of the object (association, sub-process)
Type	Type of object
Action	What was done (for now, only option is Modified)
Published Comment	The comment that was written when that object was published
Associated Version	Version of the object on the process
Current Version	New version of the object

See Synchronize for more information on data synchronization.

12.1.6.4.2.1 Synchronize

The Synchronize button allows users to include the changes done on objects in the latest published versions of the process, without creating a new version of the process.

> If the process is currently locked in an approval cycle, **Synchronize** will not be available.

Follow these steps to synchronize the association change(s):

1. Select the objects to include in the synchronize

2. Click on the “Synchronize” button

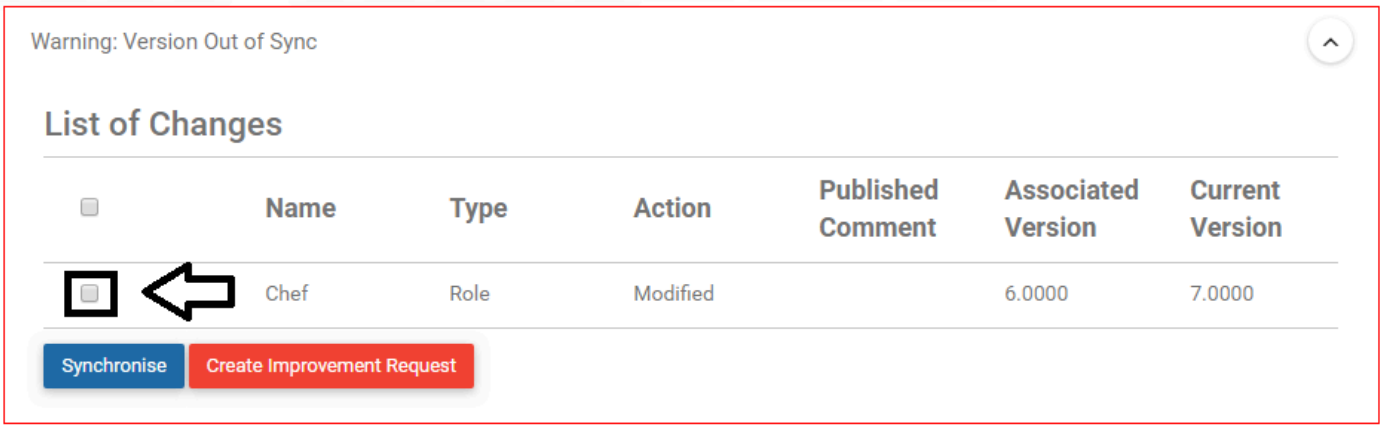
3. The objects will be removed from the list, and the changes will be included in the published version of the process

12.1.6.4.2.2 Create Improvement Request

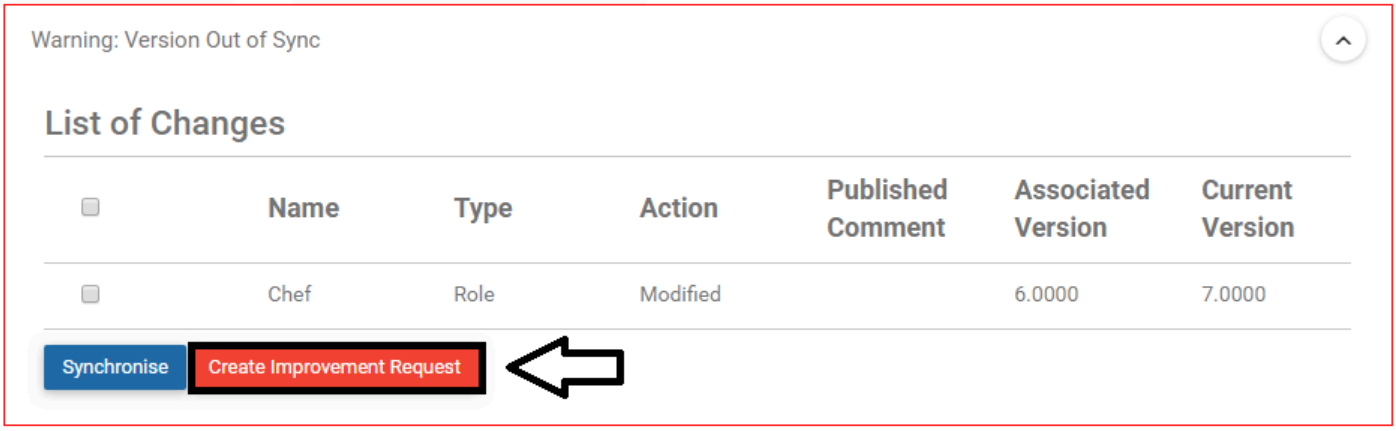
The **Create Improvement Request** button allows users to select changes but specify that these changes should be included in another version.

To create an IR for an out of sync process, follow these steps:

1. Select the objects they want to include in the IR.

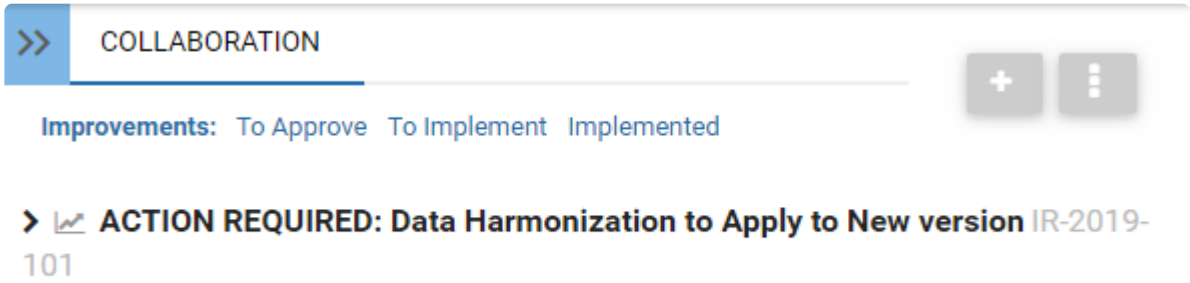


2. Click on the “Create Improvement Request” button.



3. You can add a comment to the IR.

4. The collaboration window will open with the new IR. It is already approved. All the objects that were selected are listed.



5. To include all changes in a new version, simply edit the process, all remaining changes will be included in the next version.

12.1.7 Content Translation

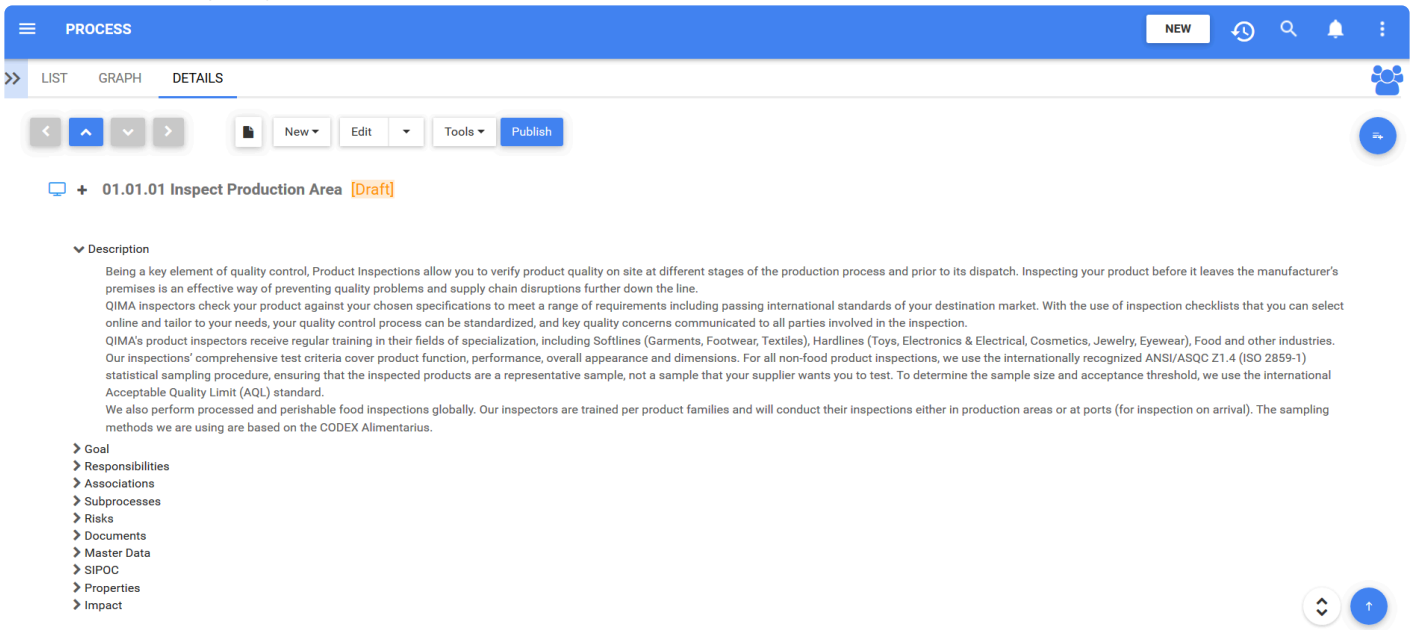
Users with multilingual EPC licenses may translate content directly within the application. With multilingual users, the EPC has augmented its multilingual capabilities allowing your editors to dynamically translate content without leaving the EPC.

This feature allows you to

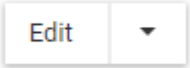
1. Translate content without leaving the application
2. Review the proposed translation before selecting it
3. Implement and edit the proposed change based on your language expertise

To use EPC's integrated content translation:

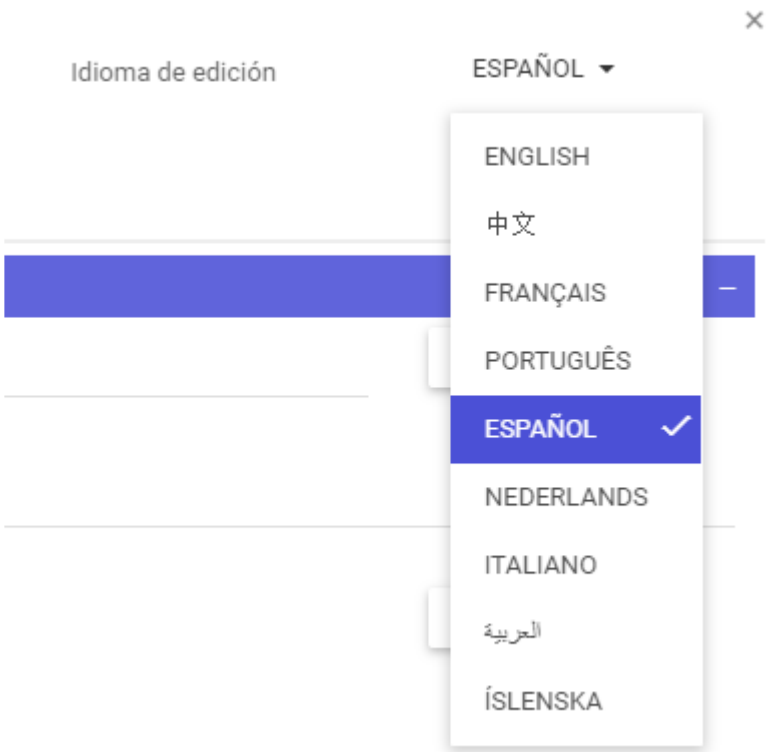
1) Select the object you wish to translate content for



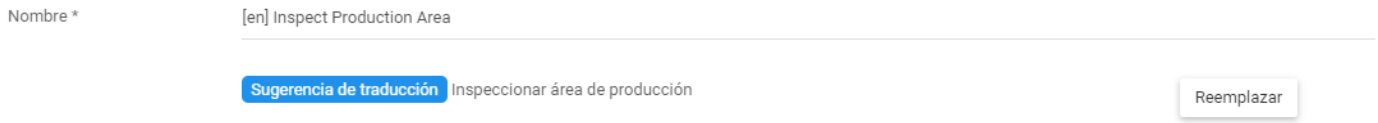
2) Click on the Edit button



3) Select the language you wish to translate content too



4) Automatically, a proposed translation will be made available which can be seen below the specific sections



5) Select the content by selecting Replace (or the equivalent word in the respective language)

6) Click the Save button to save your changes

12.1.8 Tree Selector (Editing)

Editing or creating content is something that is usually done in the module of the object we want to edit or create. But sometimes, as edit forms are completed, the need to edit to edit or create the content of an association can happen. To avoid having to navigate to the module of the object of interest, you can create new content from tree selectors.

https://www.youtube.com/embed/avEnR3utBYw?rel=0

To reach the tree selector window, it can be done in the following sections of the Details page Create/Edit form:

Section	Objects	Implementation Status
What are the Responsibilities?	All except for Org Units, Roles, Resources and Inputs/Outputs	Implemented
Which Documents are used?	All except for Objectives	Implemented
How is Performance measured?	Process	Implemented

Which Business Rules are applicable?	Process, Assets, Attributes, Entities, Rules	Implemented
Which Risks are applicable?	Process, KPI, KRI, KCI, Rule	Implemented
What are the Child Risks?	Risks	Implemented
What is the Risk Analysis?	Risks	Implemented
Which Controls are applicable?	Process, Risks, KPI, KRI, KCI	Implemented
Which Master Data are used?	Process	Implemented
What are the Permissions	Attributes, Entities	Implemented

The following sections give more details on how tree selector editing works:

- 12.1.8.1 Tree selector (Tree Editing) – Create objects
- 12.1.8.2 Tree selector (Tree Editing) – Edit Objects
- 12.1.8.3 Tree selector (Tree Editing) – Delete objects

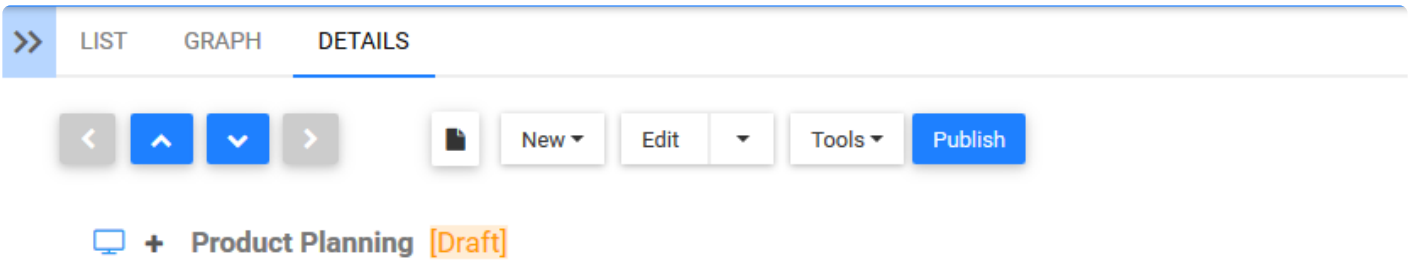
12.1.8.1 Tree selector (Tree Editing) – Create objects

To create new content, **everything** can be done through **right-clicking**.

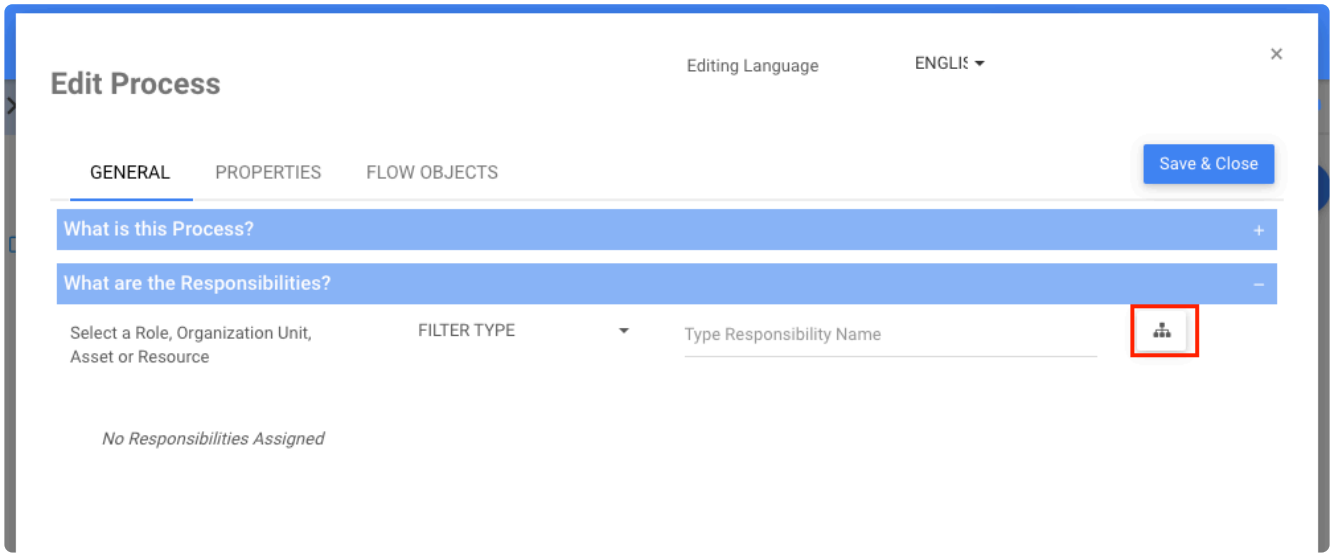
Instructions to create content

These steps only have to be followed in order for the first time content is created. Once there is existing content, the right-clicking can be done from any object.

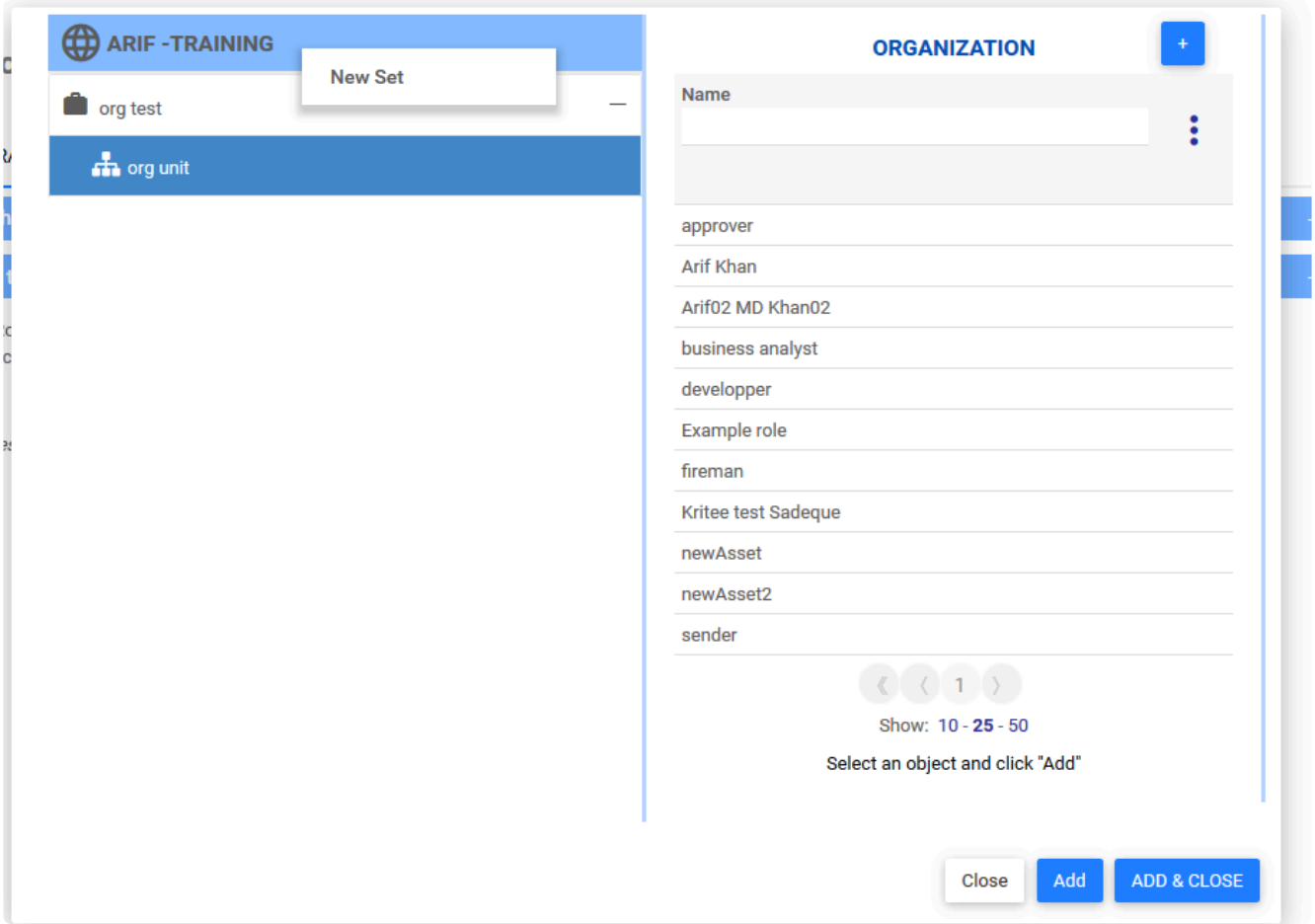
1. Access the Details page of an object you want to edit (for this example, we are starting from a process) and select “Edit”.



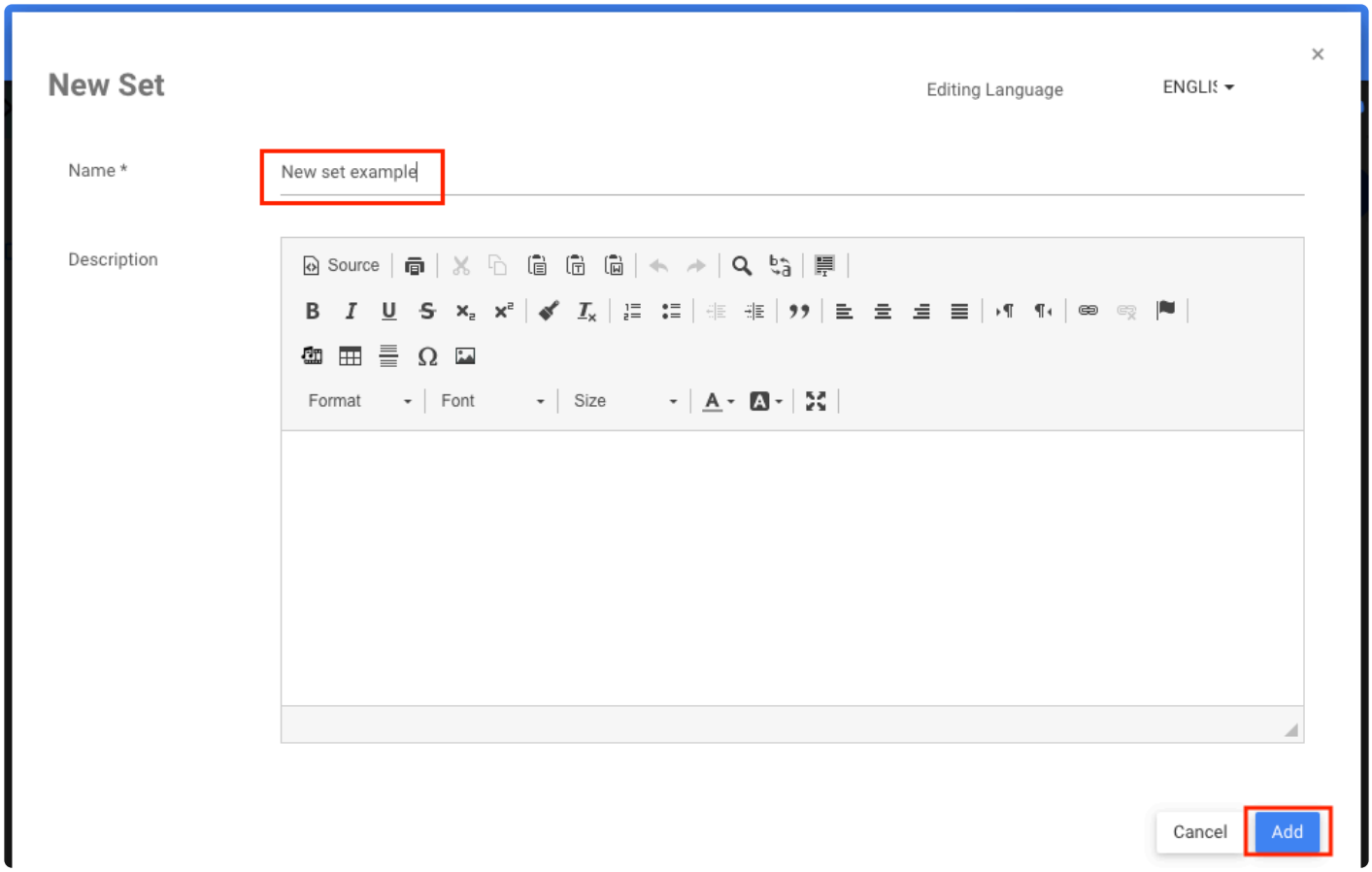
2. Navigate to the tree selector of the section in which you want to create new content (in this example we will create new content for the Organization module).



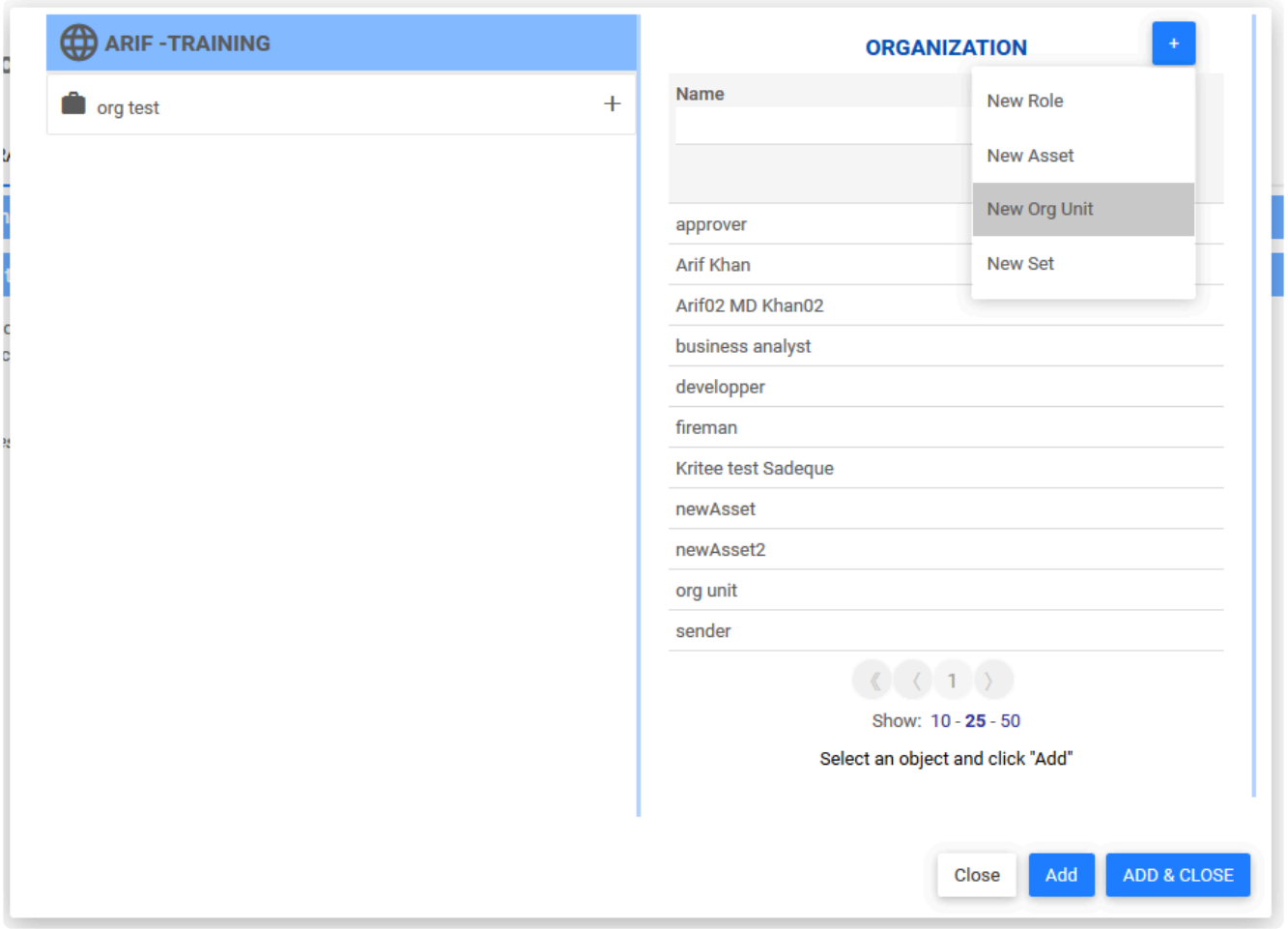
3. Right-click on the header and click on the “New Set” option.



4. Enter the name of the “New Set” and click on the **Add** button.

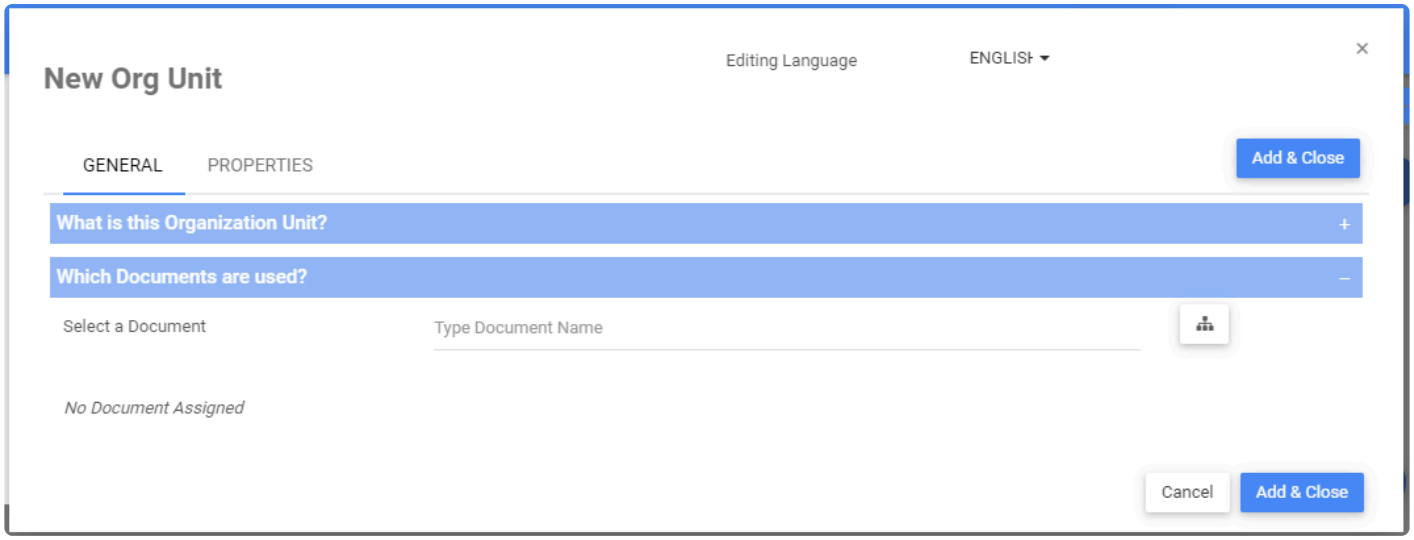


5. Right-click on the set and click on “New Org Unit” option.

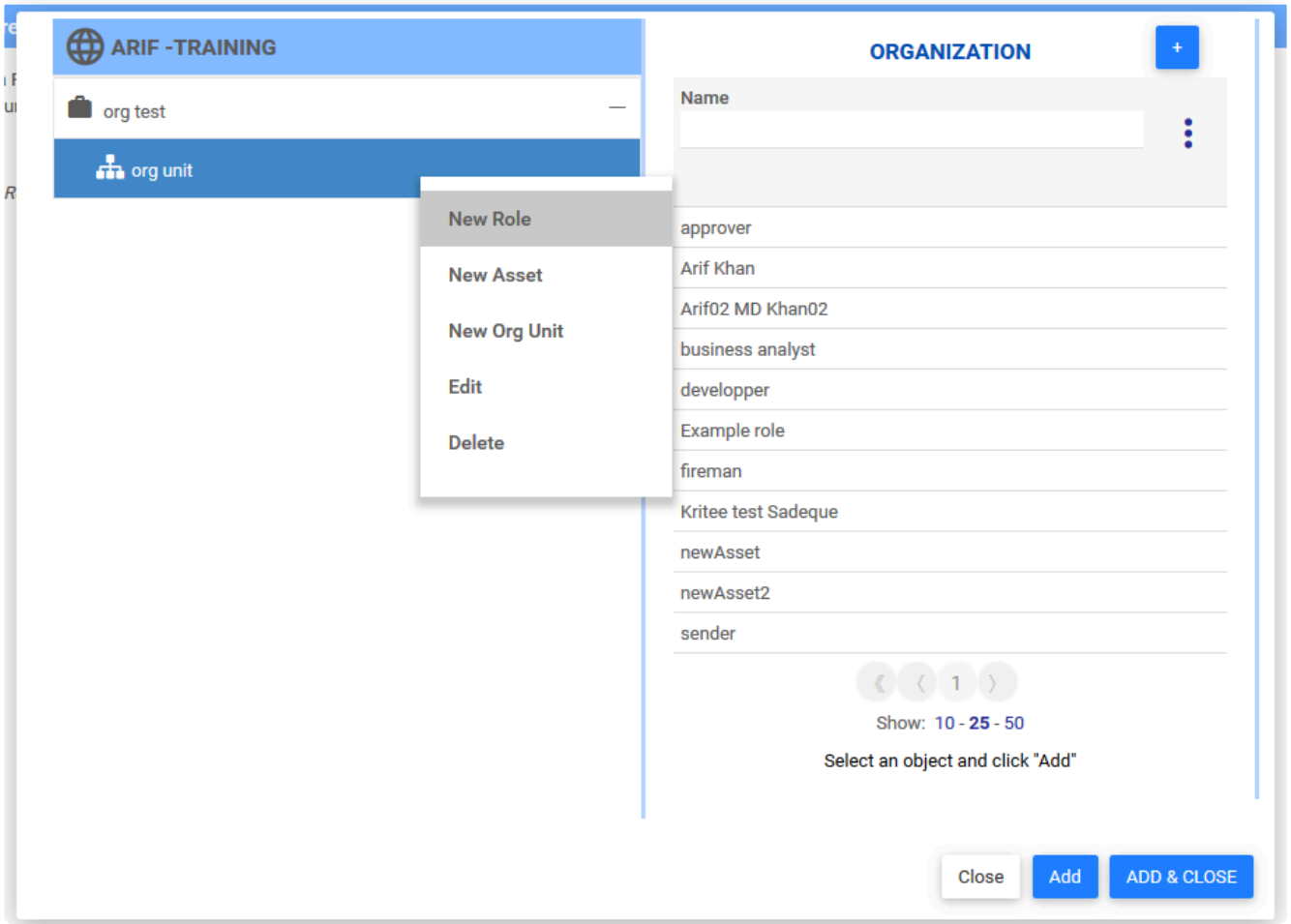


6. The same way you did for the set, you can enter the following information about the “New Org Unit” and click on the **Add** button:

- The name of the Org Unit
- Display of the selected Org Unit, that will become the parent of the input/output
- The option to select another available parent

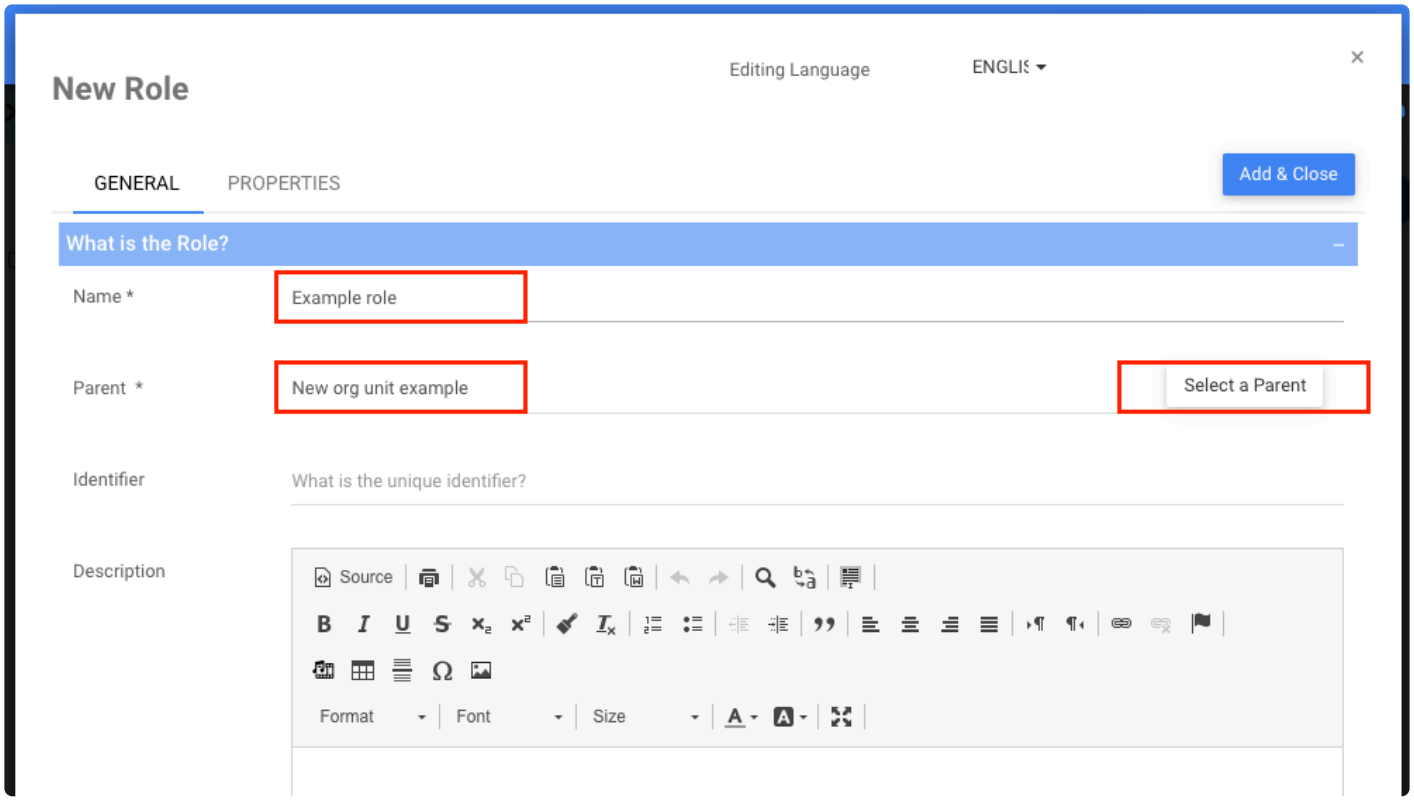


7. Right-click on the Org Unit and click select one of the “New” displayed options. For the example, we will create a “New Role”.

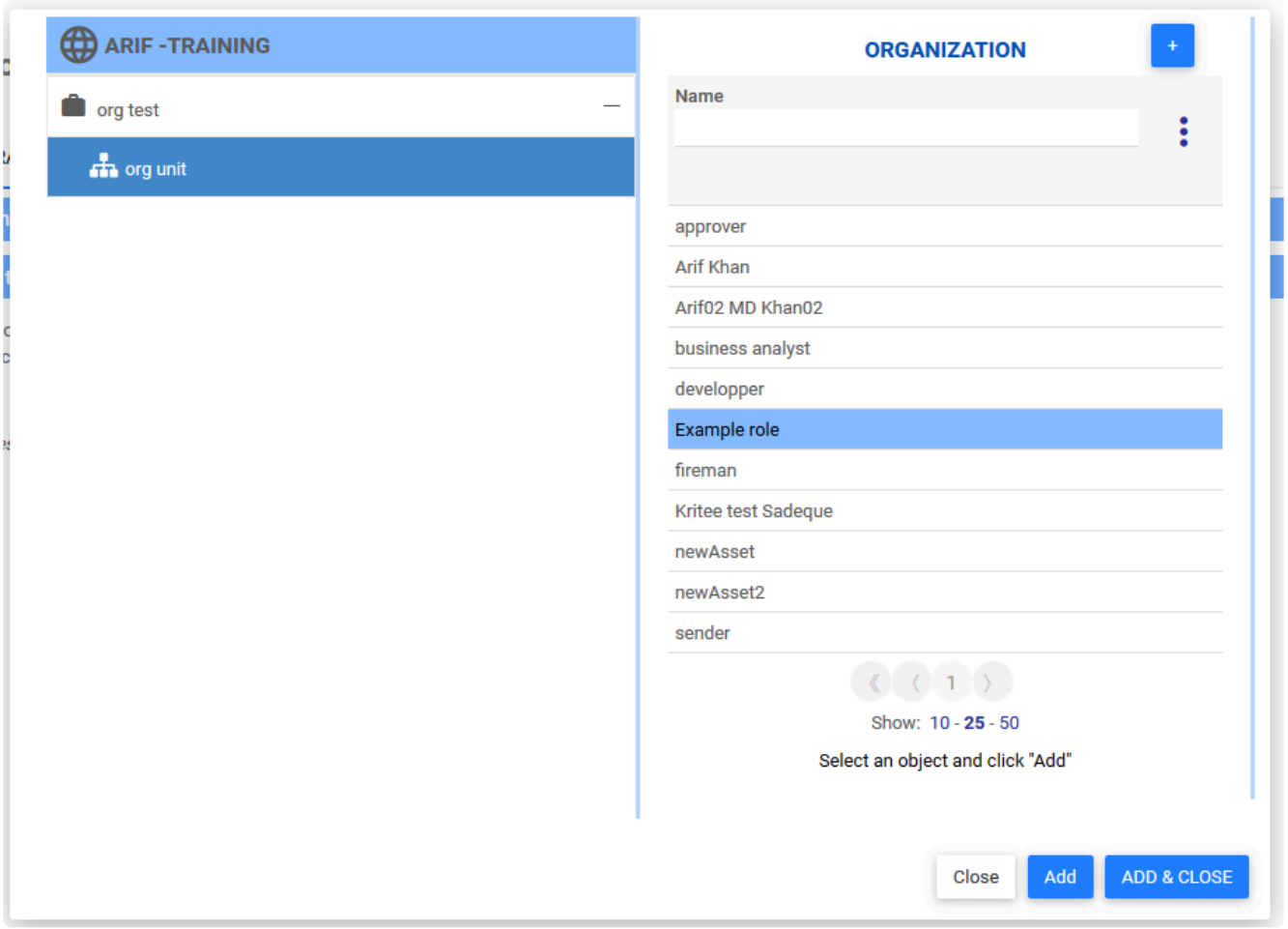


8. You can view and change different options in the page that opens:

- The name of the Role
- Display of the selected Org Unit, that will become the parent of the input/output
- The option to select another available parent



9. Once the role is created, it will be found in the list, under the selected parent.



Once a set is created, the sub-leveled objects you can create are the same than the ones you can create directly from the module. For some modules (document for example) you can create folders, for others (organization or performance) you can create objects under sets. The tree selectors follow the logic of each module.

12.1.8.2 Tree selector (Tree Editing) – Edit Objects

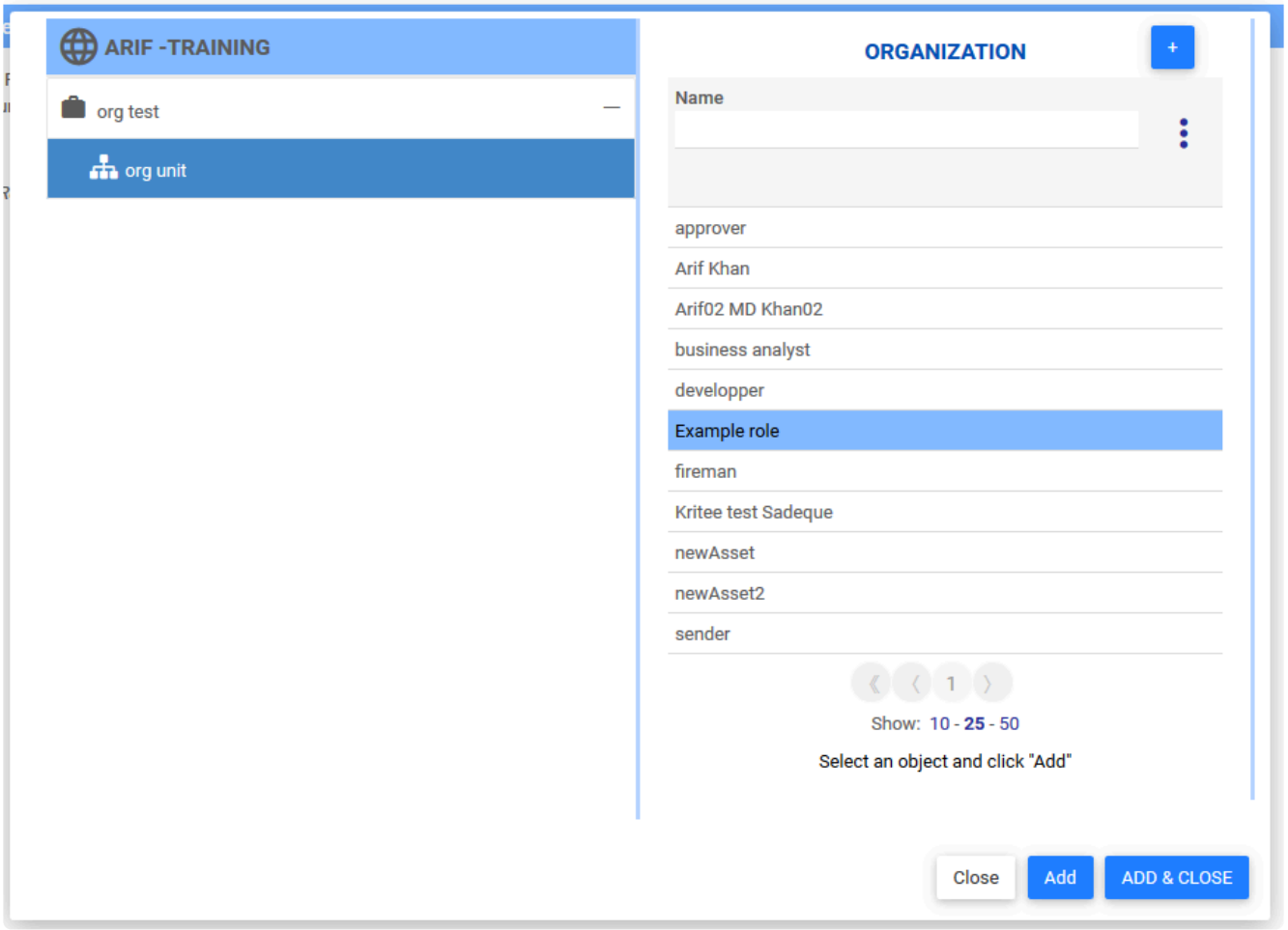
To edit content, **everything** can be done through **right-clicking**.

Instructions to edit content

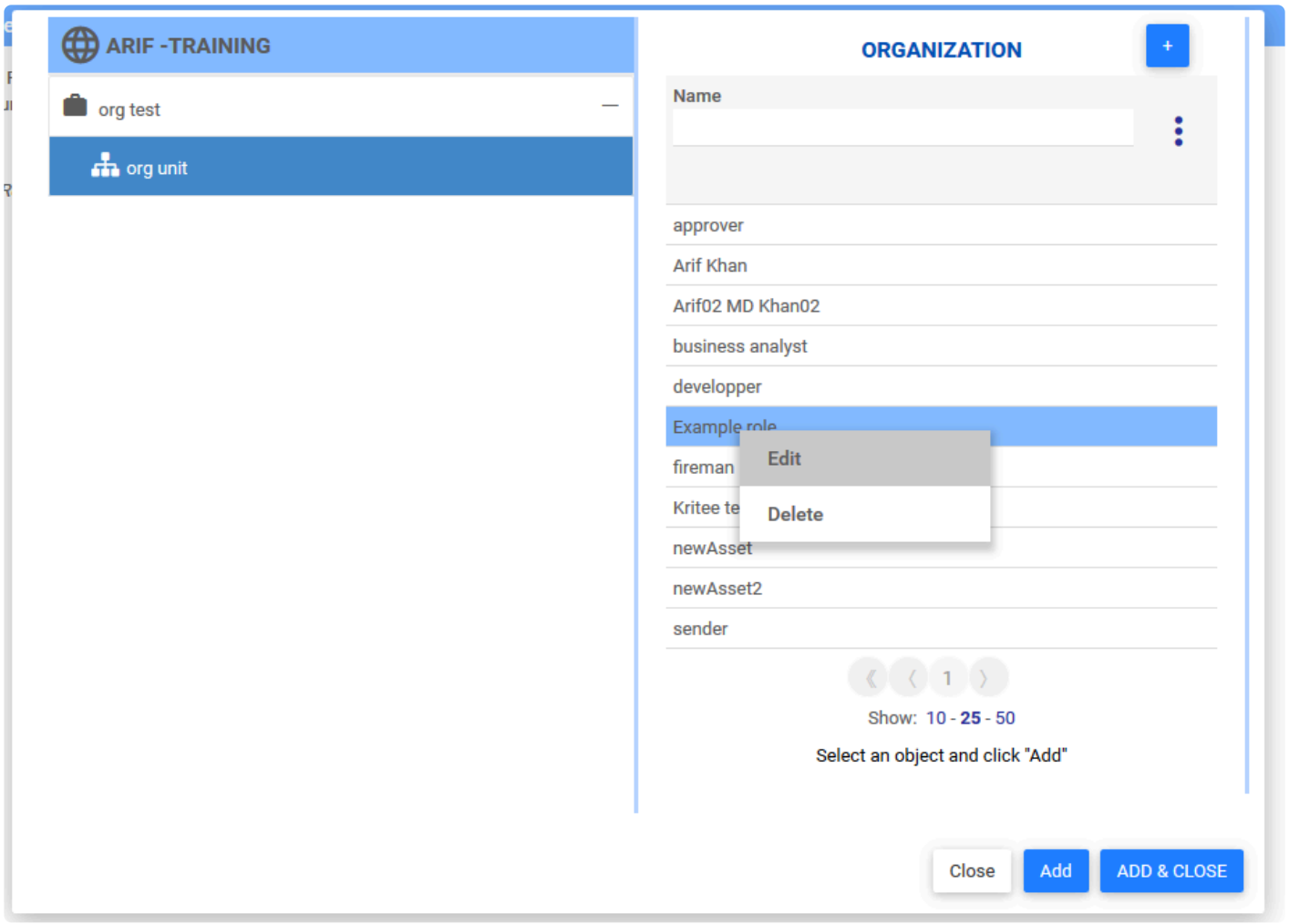
> The edit action is available for every objects that exists in the tree. The exception is for Resources for the Organization module, that can't be created/edited/deleted from the tree selector.

To access the tree selector, proceed the same way than when you [create new content from the tree selector](#).

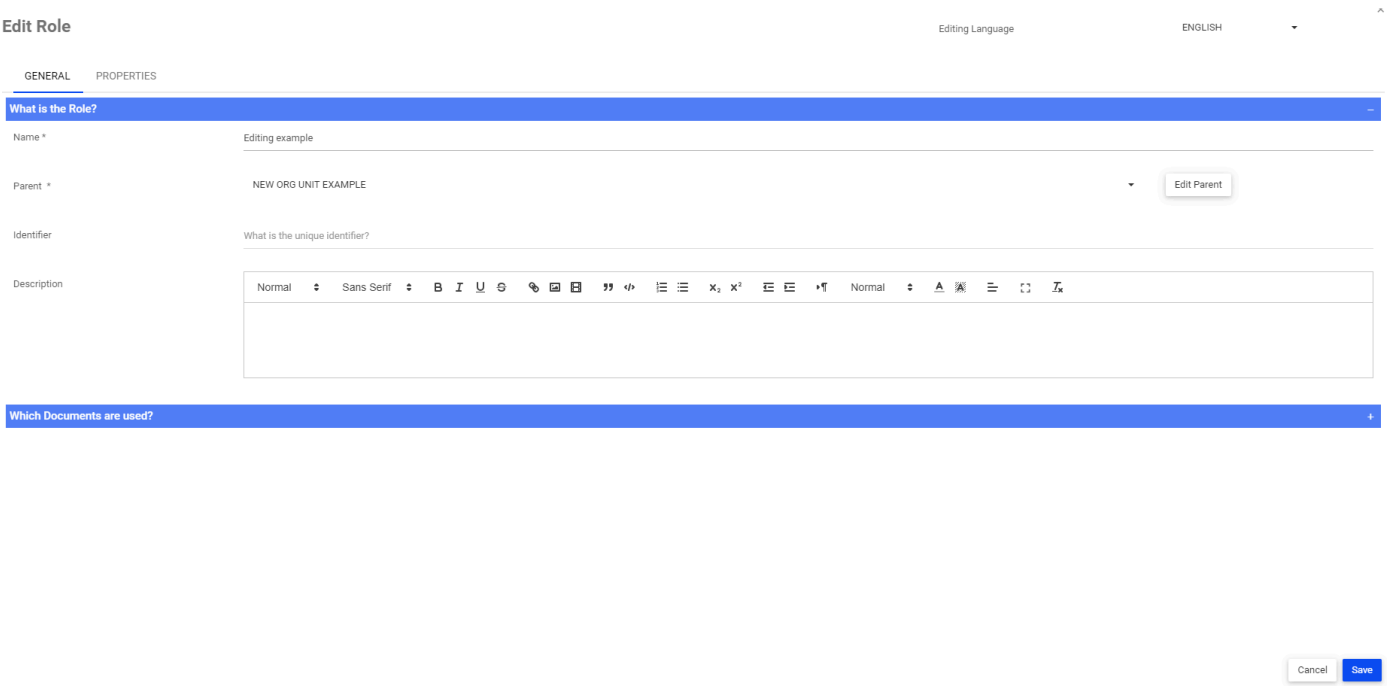
1. Right-click on the object of interest that you want to edit. The example will be done from the Responsibilities section of the Details form, for a role , but it works the same way for folders, sets, and other objects of others modules.



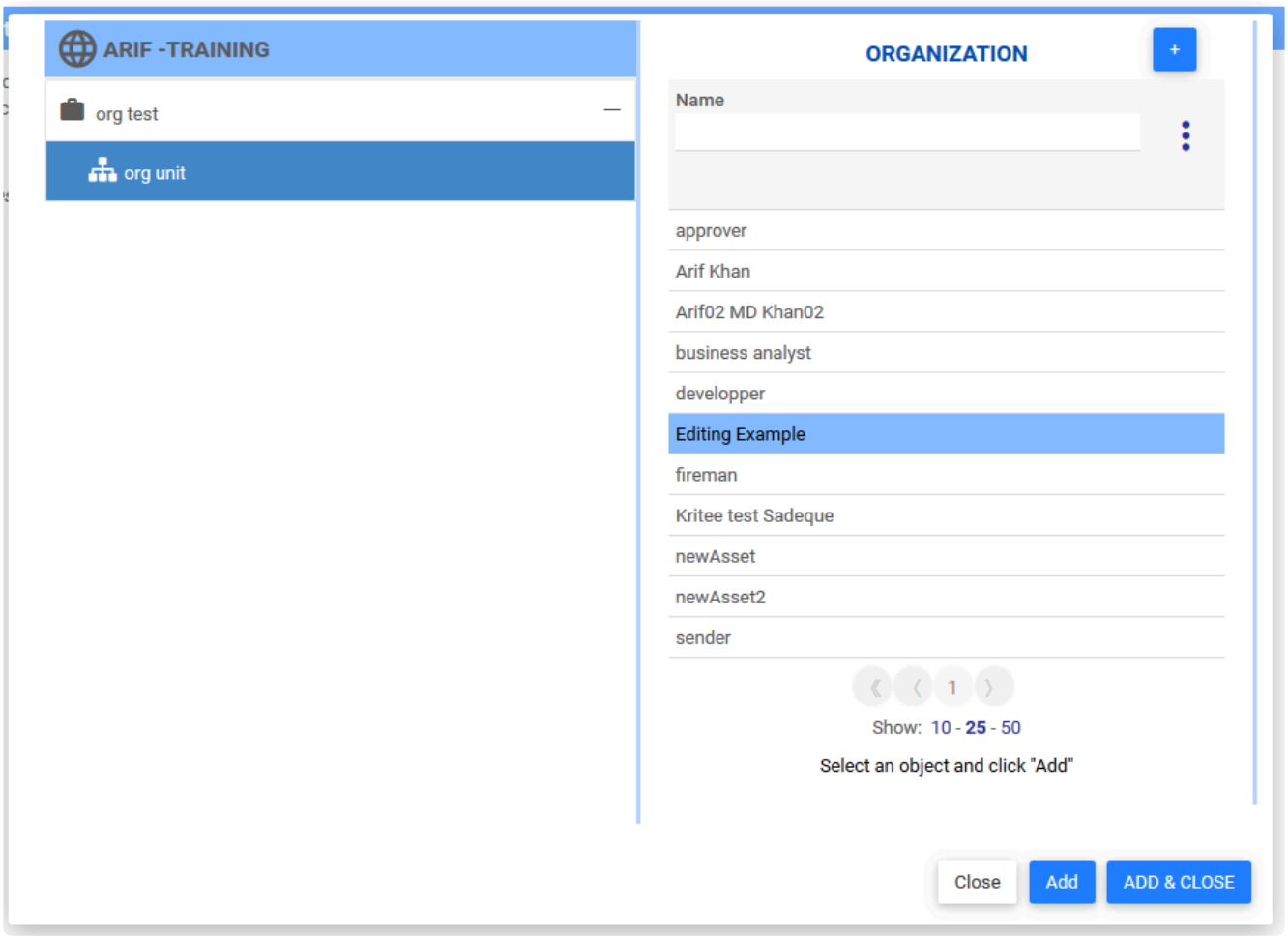
2. Click on the “Edit” option.



3. The edit page opens up. You can change the name or change the parent. Click “Save” when you are done editing.



4. The list will display the object with the new name and/or under the new parent.



12.1.8.3 Tree selector (Tree Editing) – Delete objects

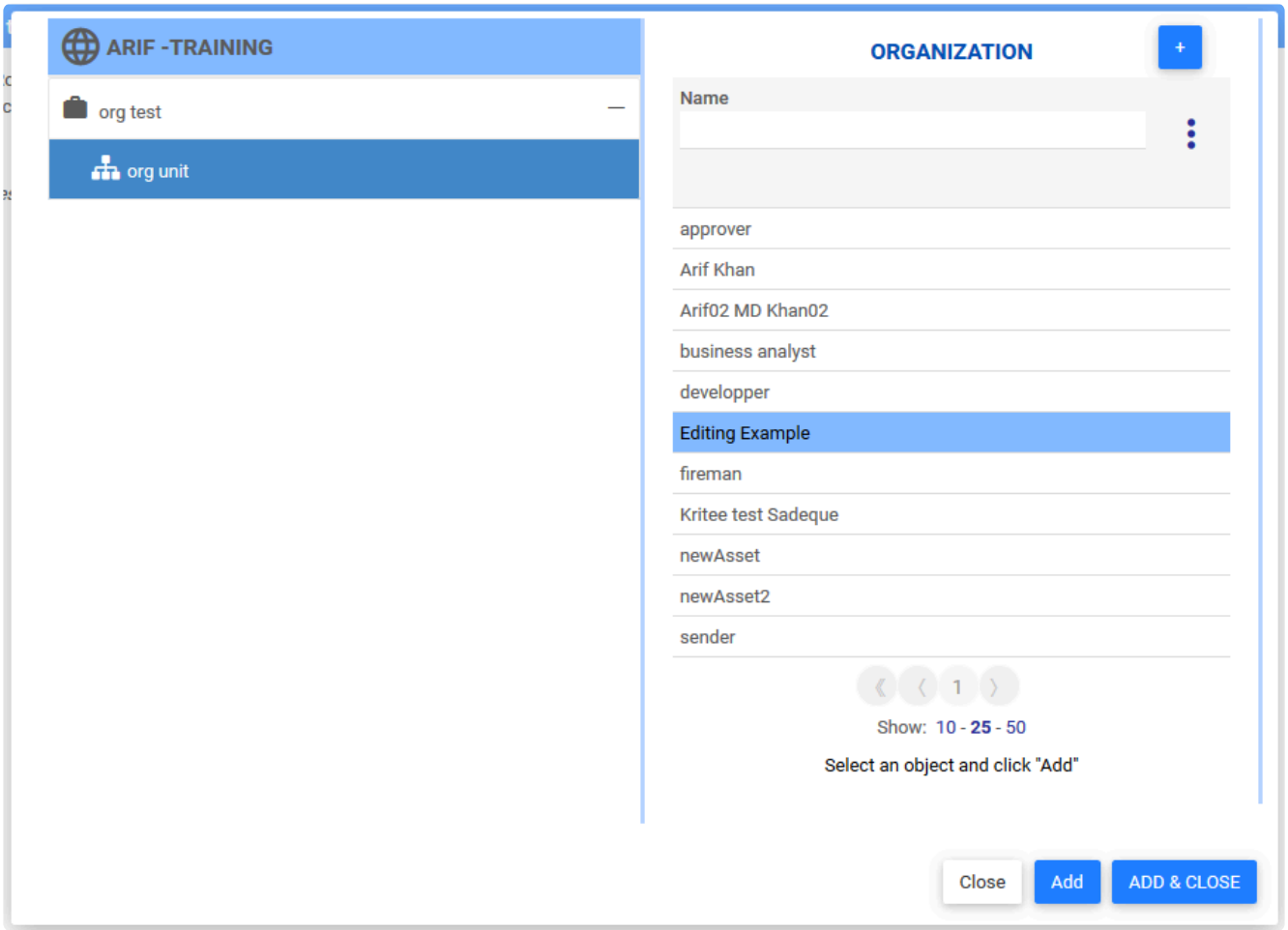
To delete content, **everything** can be done through **right-clicking**.

Instructions to delete content

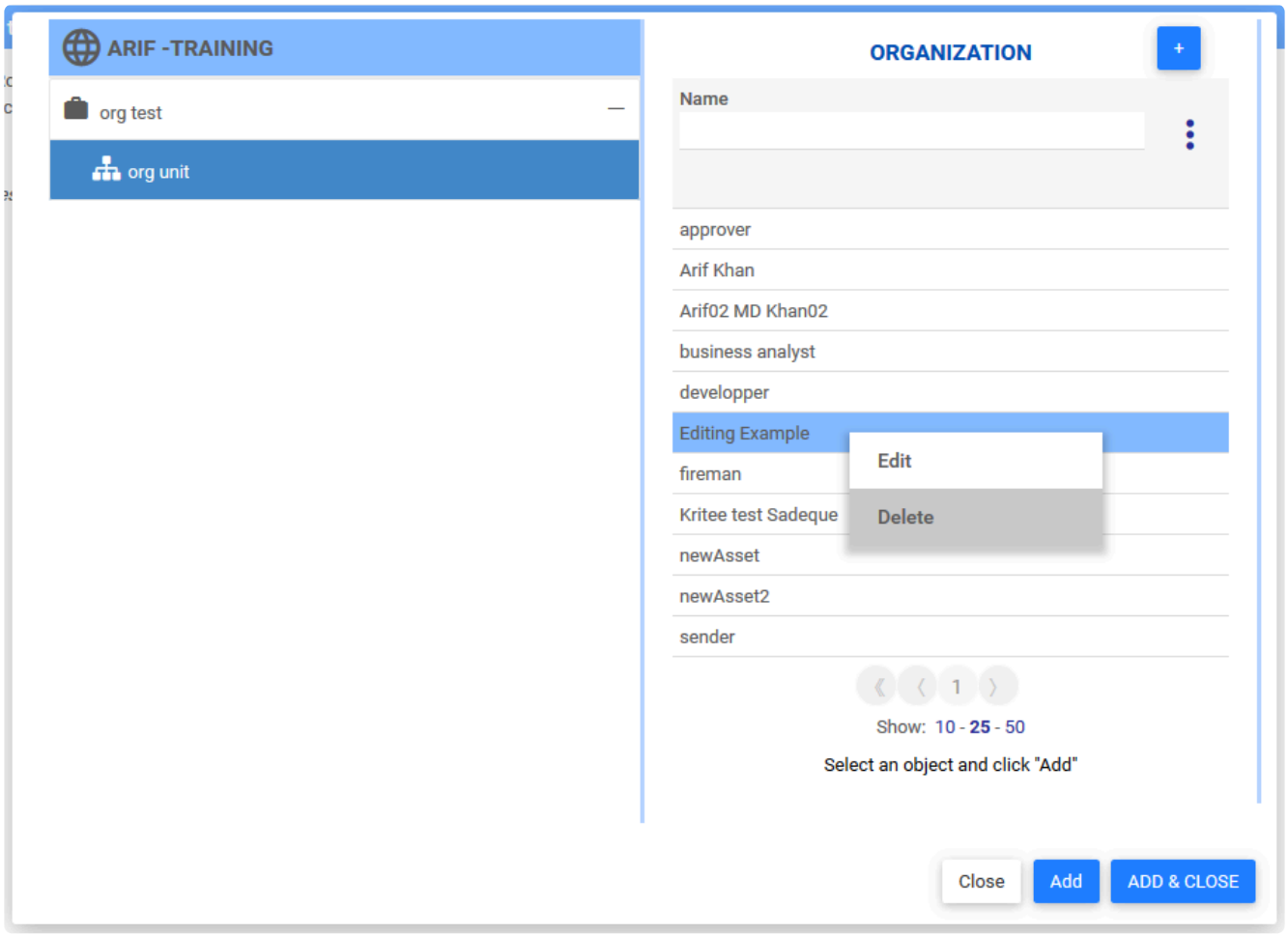
> The delete action is available for every object that exists in the tree. The exception is for Resources for the Organization module, that can't be created/edited/deleted from the tree selector.

To access the tree selector, proceed the same way than when you [create new content from the tree selector](#).

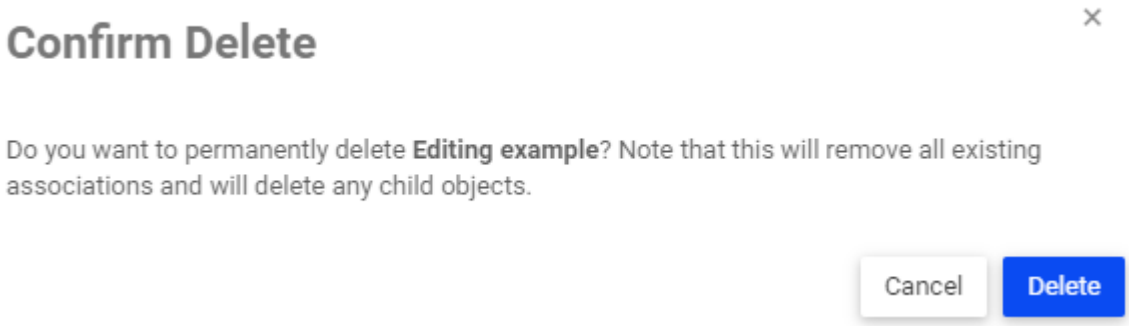
1. Right-click on the object of interest that you want to delete. The example will be done from the Responsibilities section of the Details form, for a role, but it works the same way for folders, sets, and other objects of other modules.



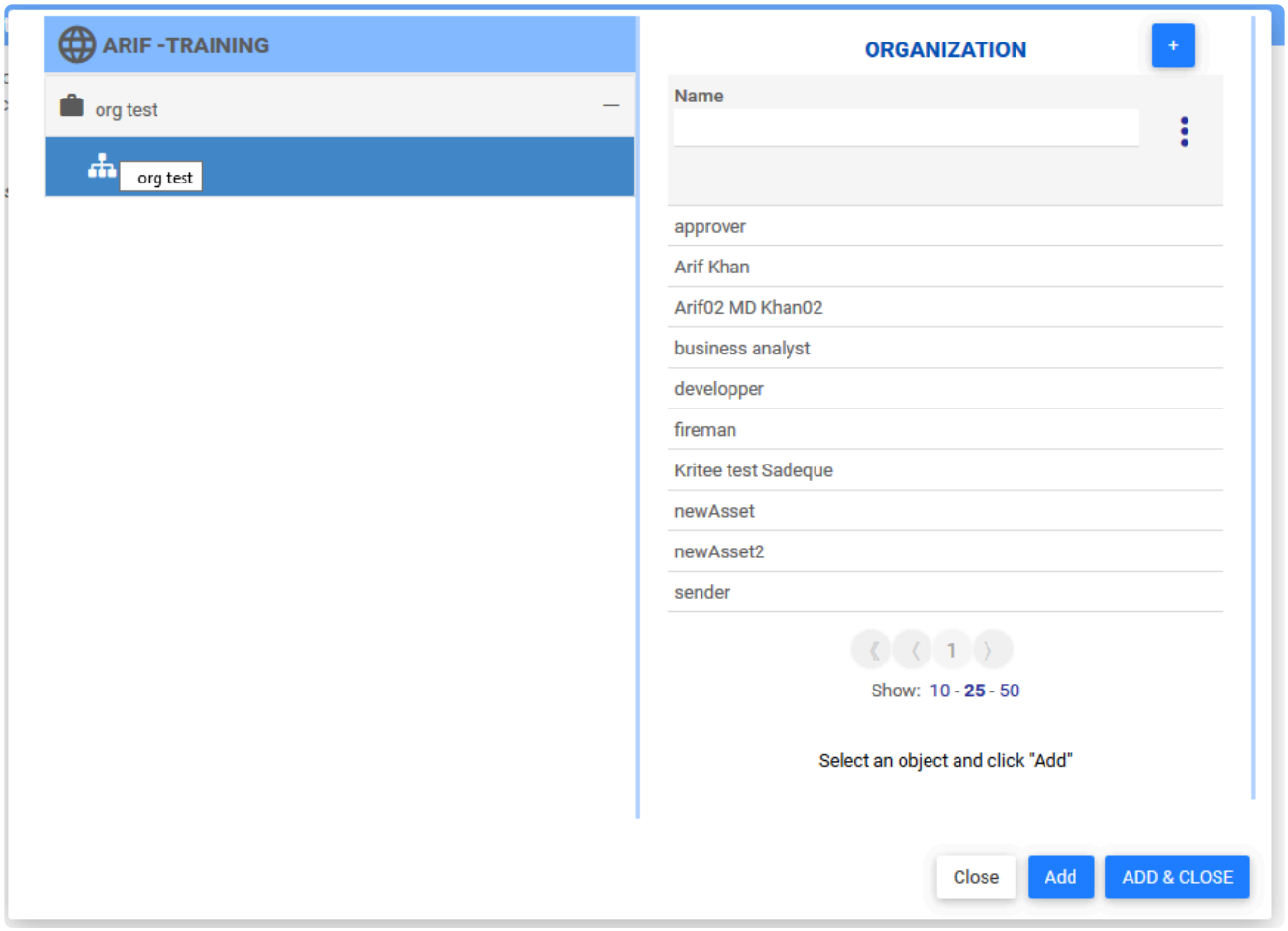
2. Click on the "Delete" option.



3. A confirmation pop-up will appear. Click on “Delete”.



4. The list won’t display the input/output that has been deleted.



When deleting an object in the tree on the left (sets, folders, org units, objectives), all the content within will also be deleted, like anywhere else in the WebApp.

12.1.9 List View

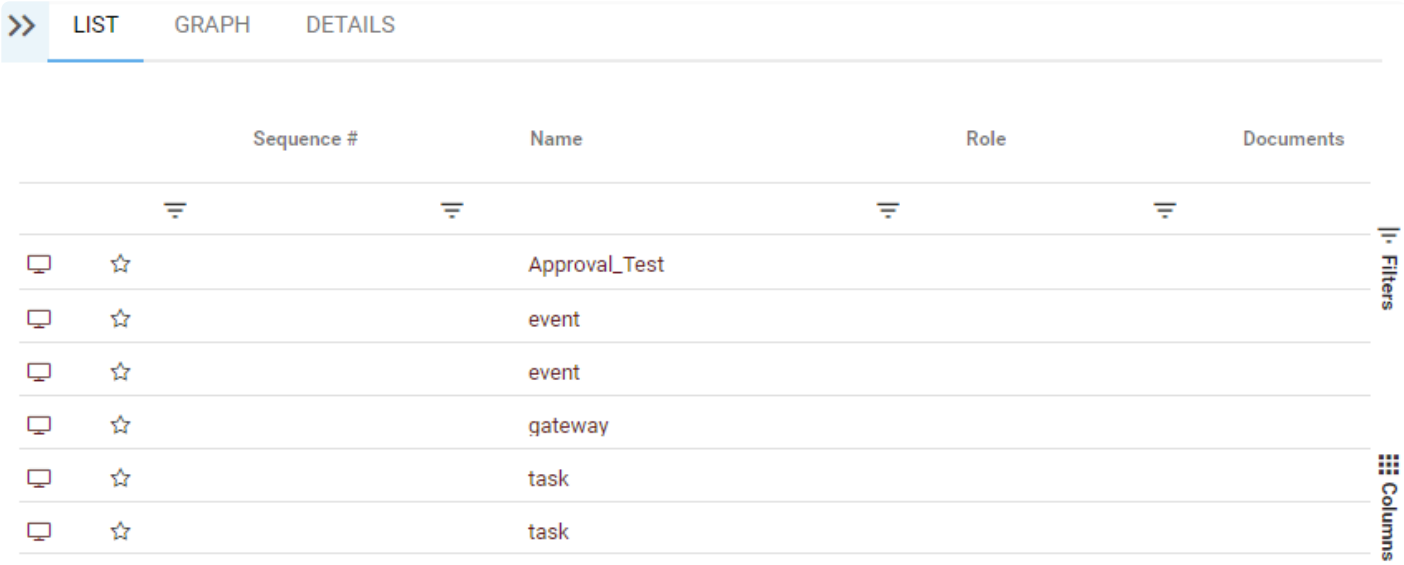
The list view allows users to see all the objects types that they have access to, including the specific details within them.
The current list view has many features that allows the user to set a personalized view of their column selection on any modules.
The table below list all the actions a user can do on the list view of any objects

Action	Description
Add column	User can add columns by clicking on the checkbox in the **Columns** setting
Remove column	User can remove columns by clicking off the checkbox in the **Column** setting
Save Columns	User can save the order and their column selection by clicking on the “Save Columns” button in the **Column** setting
Reset to Default	User can reset column to system default by clicking on the “Reset to Default” button in the **Column** setting
Change order of columns	User can change order of columns by dragging on the column name
Filter	User can filter any columns (**Filtering options varies depending on the column**)
Export	User are able to export the current selection of columns by right-clicking on the list and selecting **Exports (Current Fields)**

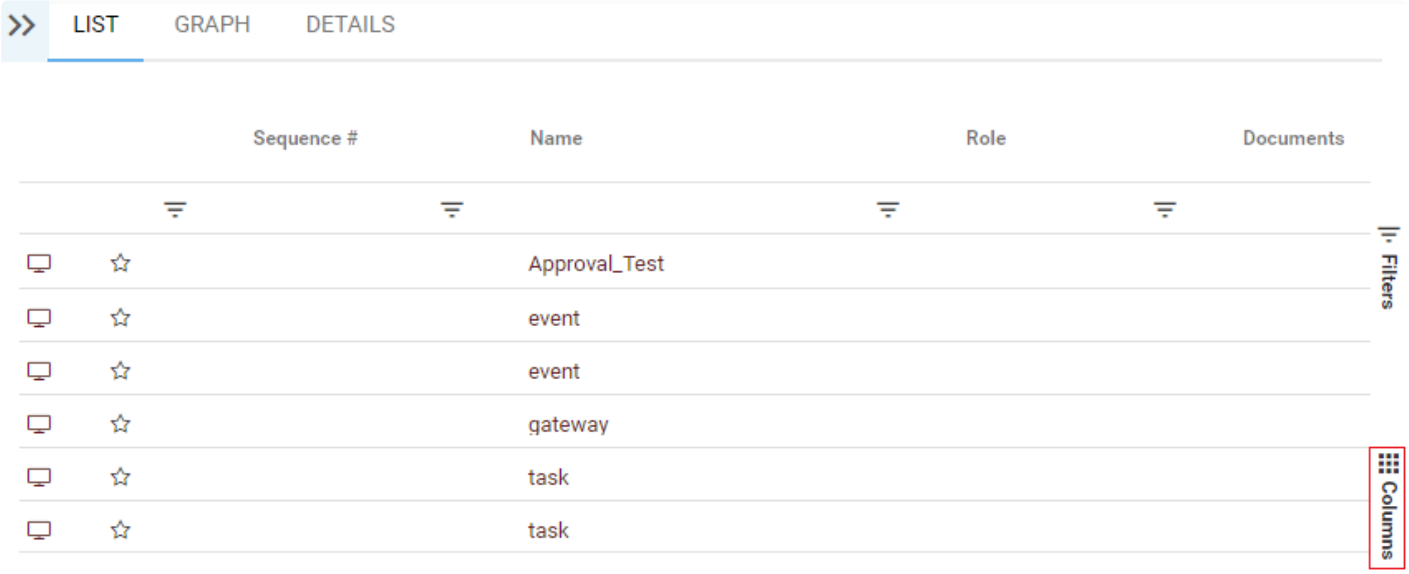
Export (Current Fields) only export to excel the columns that are shown in the list and the pages the user has visited

12.1.9.1 Adding Columns

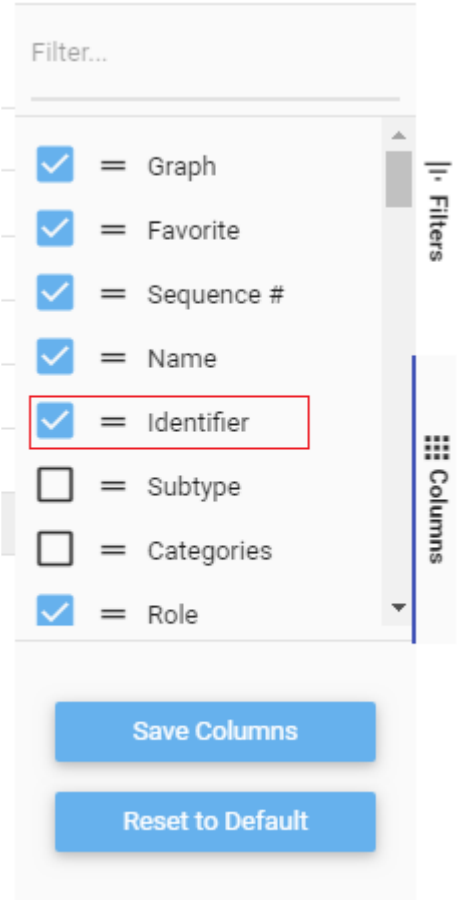
1. Navigate to the list page on any module



2. Once on the list view, click on the Column Panel located to the right



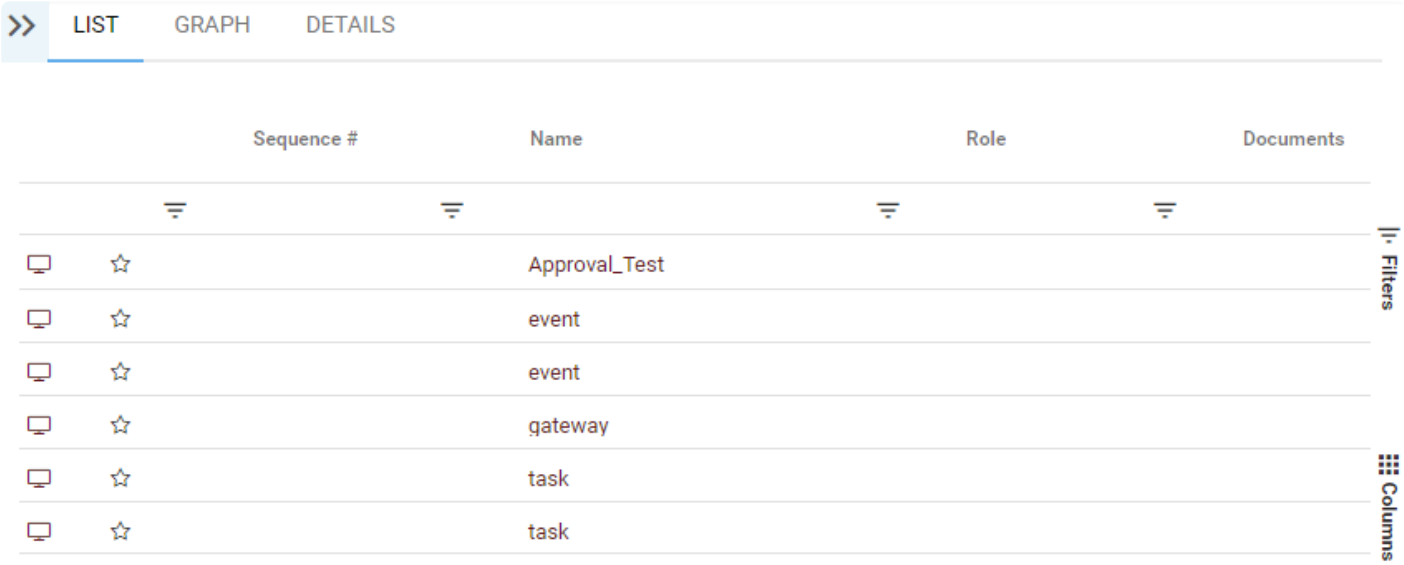
3. Click on a checkbox to add a column from the list



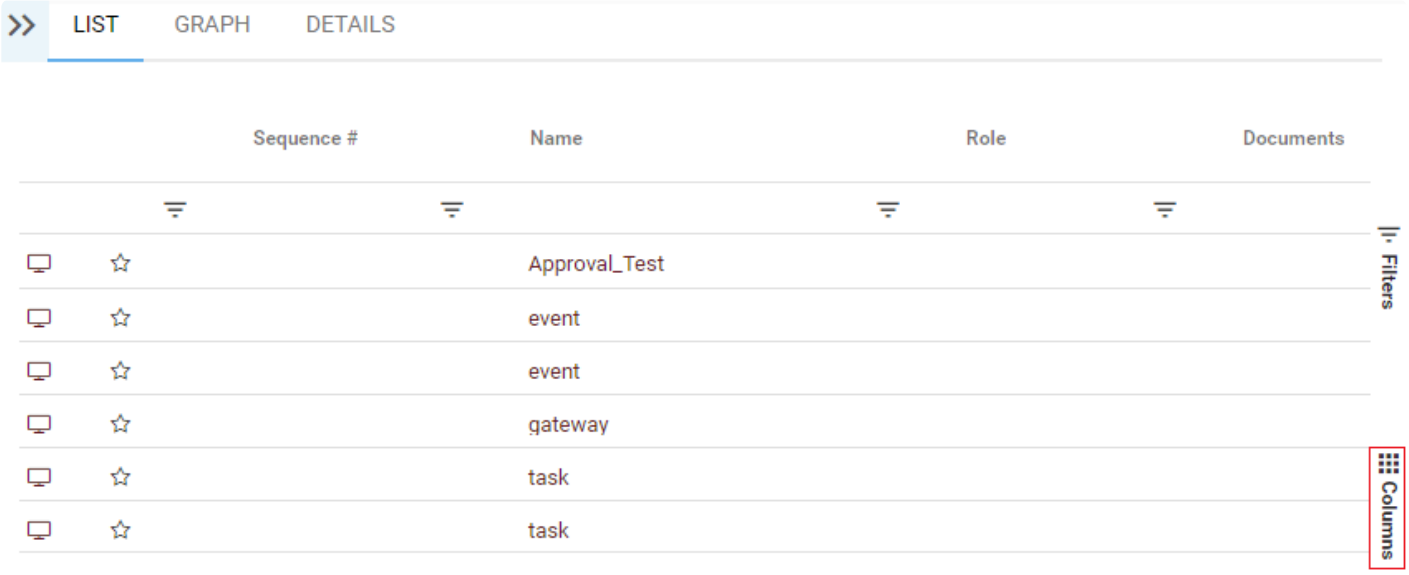
4. View the change in the list view

12.1.9.2 Removing Columns

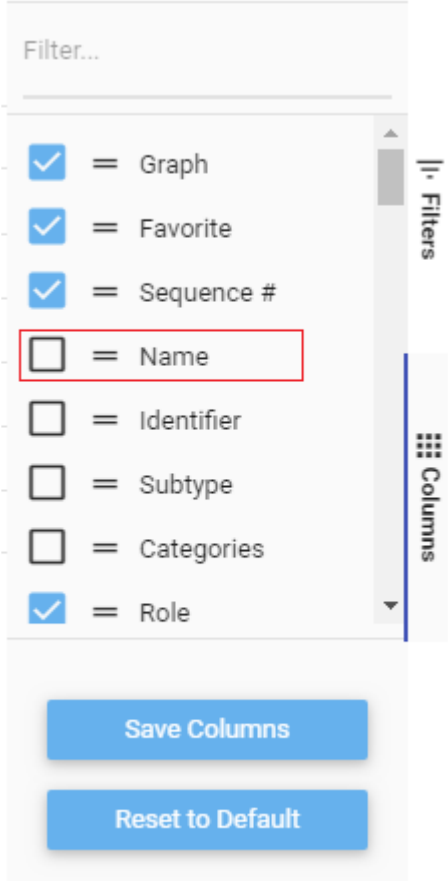
1. Navigate to the list page on any module



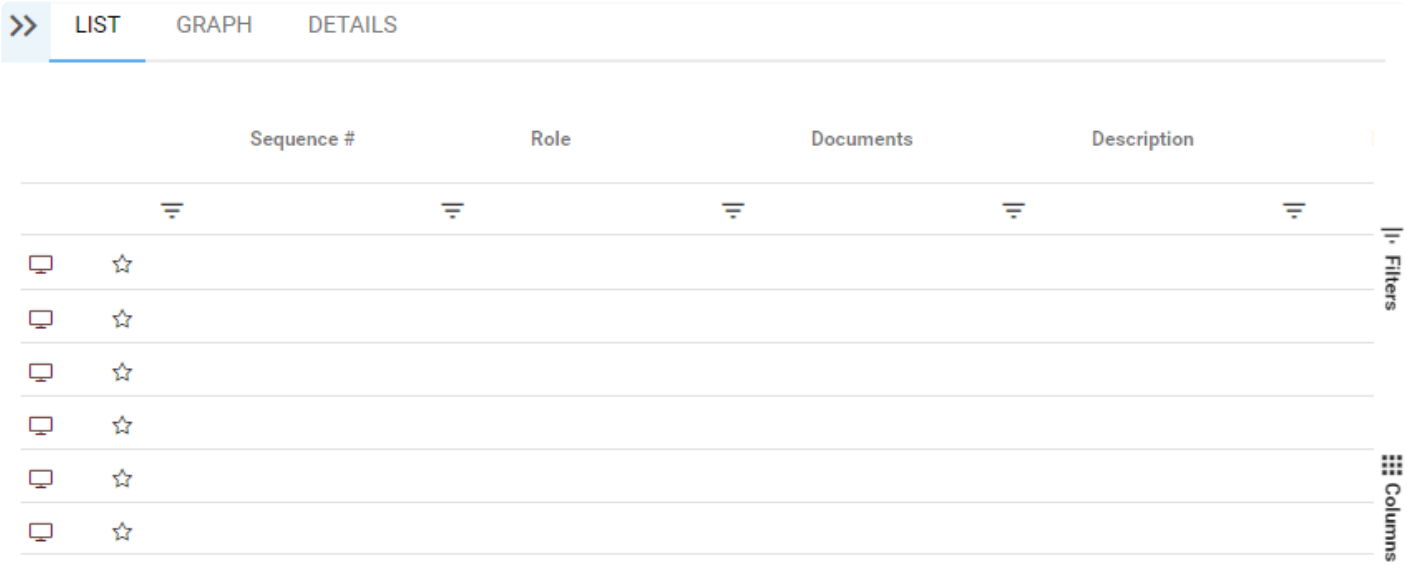
2. Once on the list view, click on the Column Panel located to the right



3. Click off a checkbox to remove a column from the list

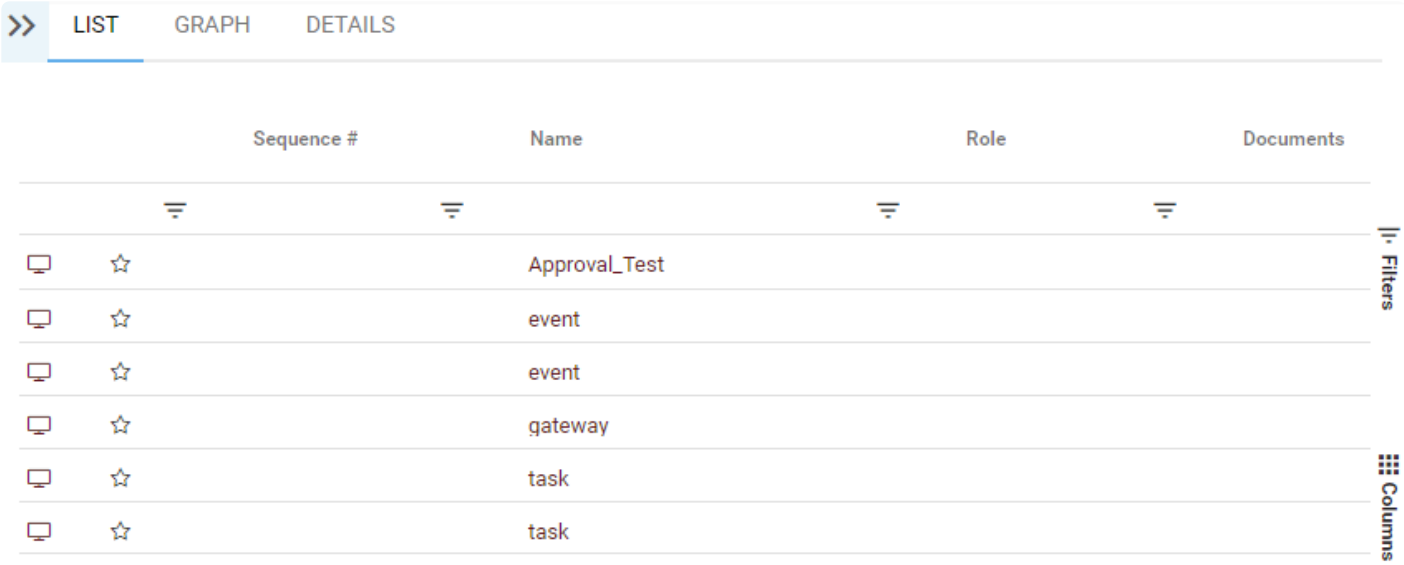


4. View the changes in the list view

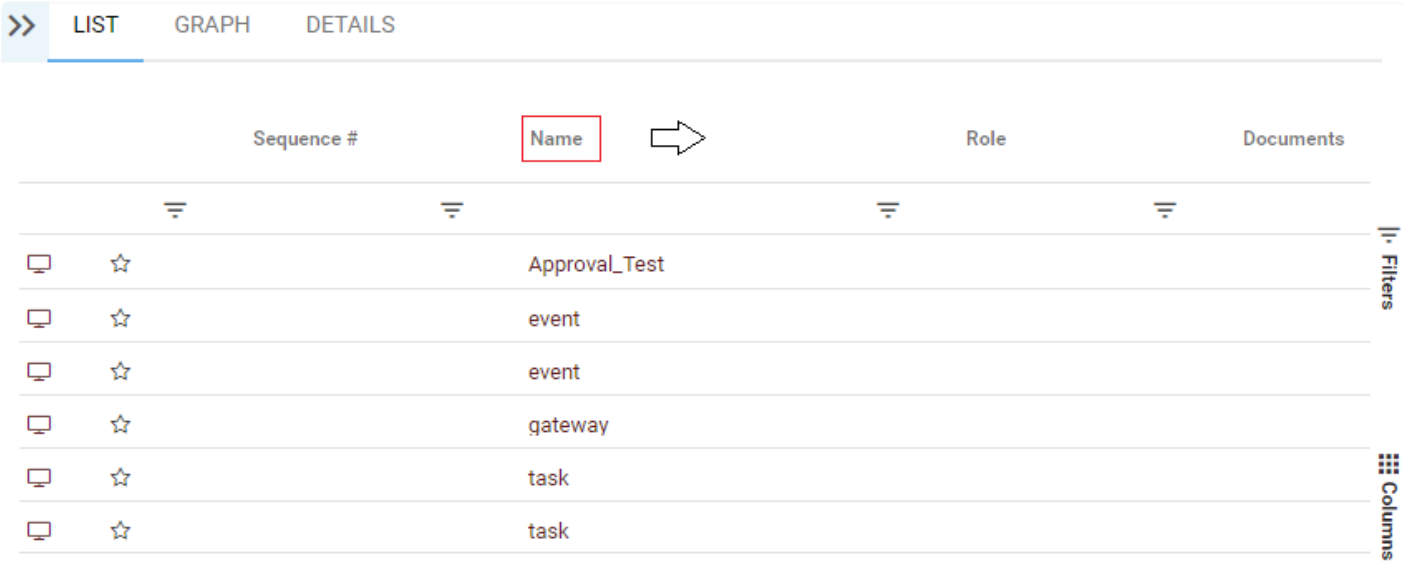


12.1.9.3 Ordering Columns

1. Navigate to the list page on any module



2. Once on the list view, click & hold on the name of the column to change the order



3. View the changes in the list view

LIST GRAPH DETAILS

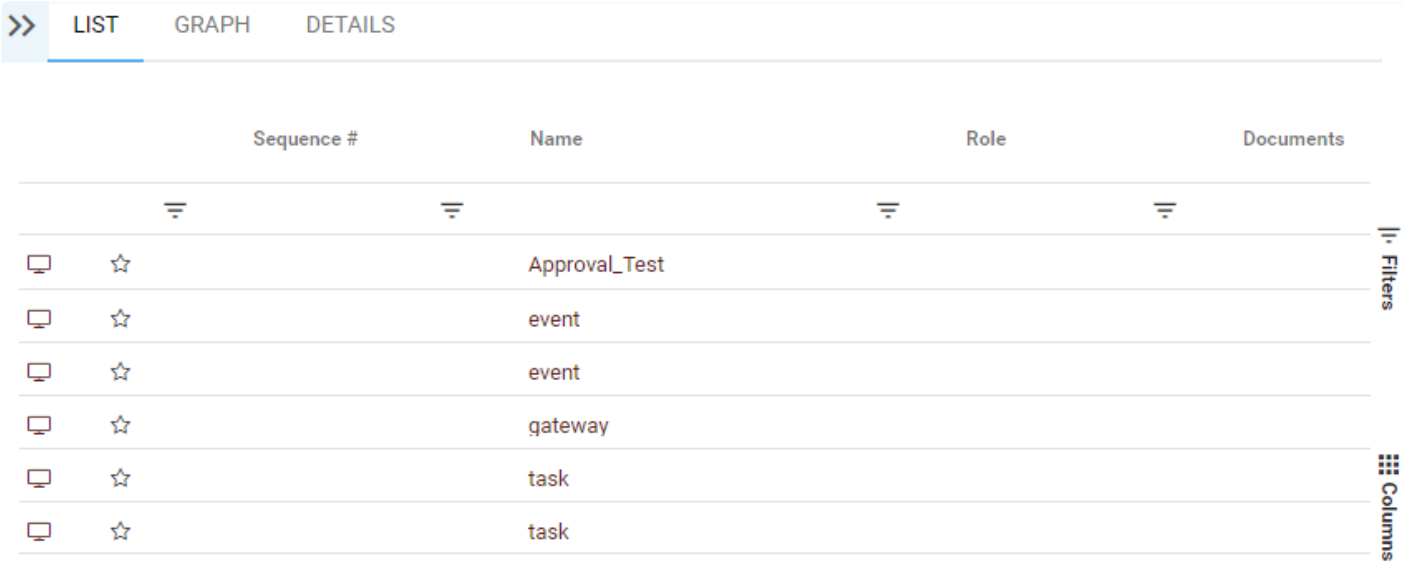
		Sequence #	Role	Name	Documents
				Approval_Test	
				event	
				event	
				gateway	
				task	
				task	

Filters

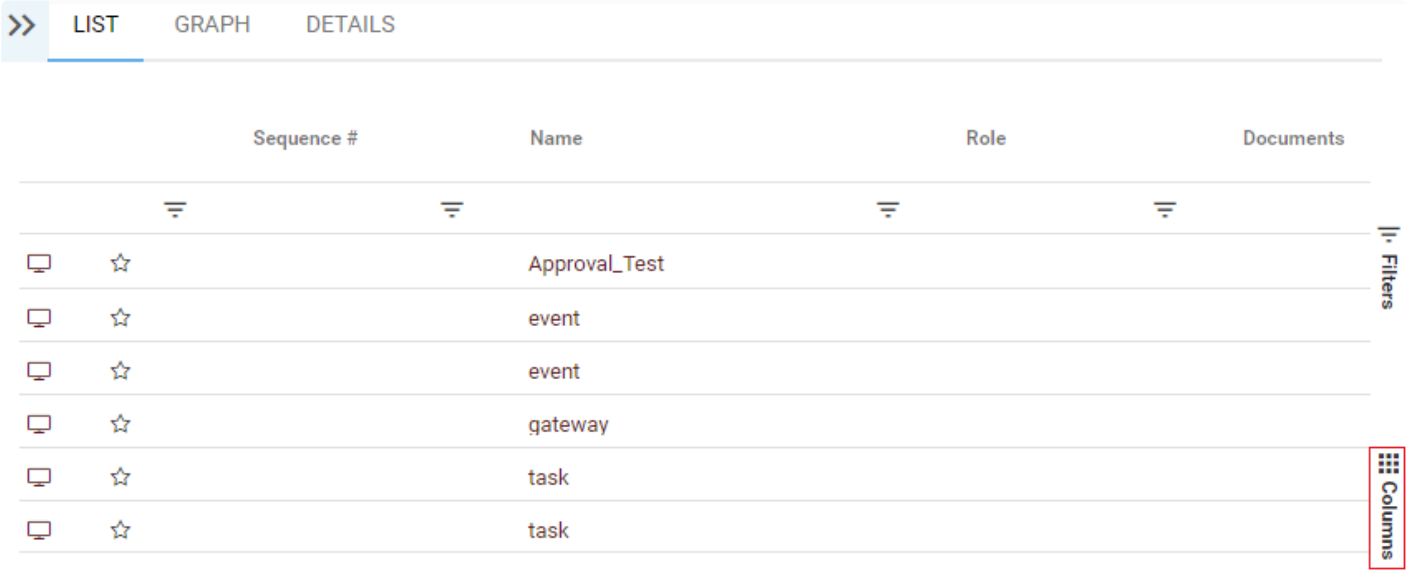
Columns

12.1.9.4 Saving Columns

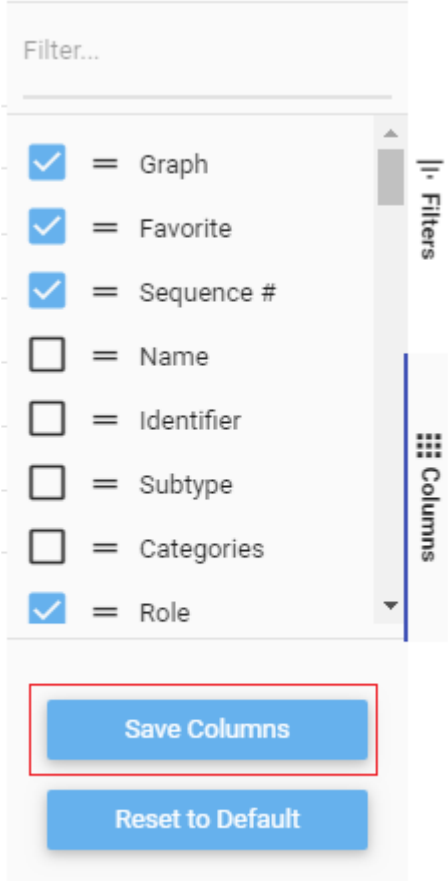
1. Navigate to the list page on any module



2. Once on the list view, click on the Column Panel located to the right



3. Click on the save button to save the order of the


Filter...
Graph
Favorite
Sequence #
Name
Identifier
Subtype
Categories
Role
Filters
Columns
Save Columns
Reset to Default

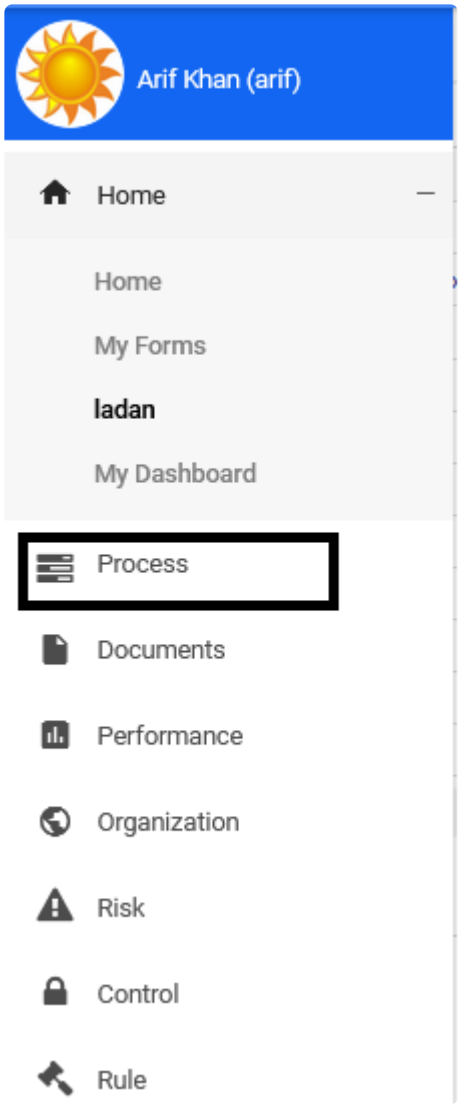
12.1.9.4.1 Saving Columns As Environment Default

This functionality allows admins to set columns as environment default for all the user and to provide a company standard.
An admin can **add, remove, or re-order columns** before saving them as default.

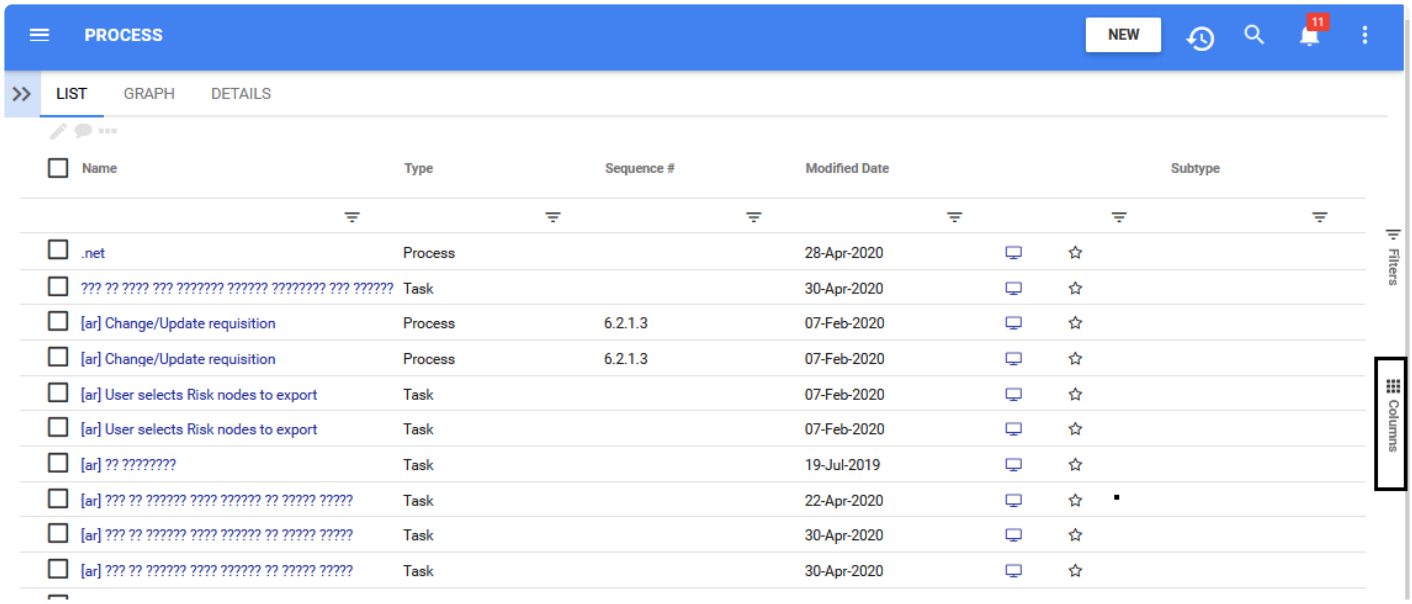
1. Login as an environment admin or system admin

2. Navigate to your desired environment

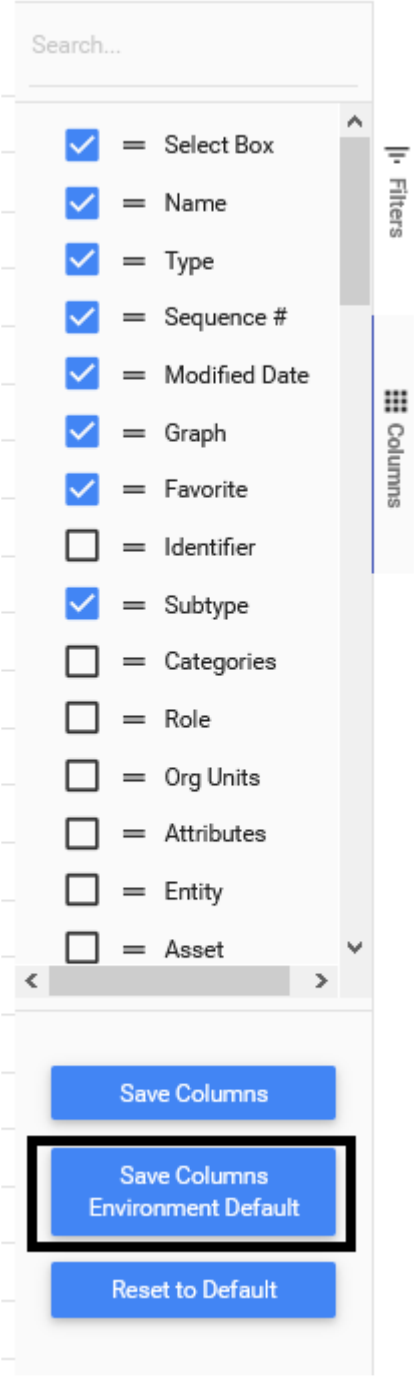
3. Go to any module, for this example we will user the Process Module, and you will be navigated to the List View



4. Go to the column section in the right corner of the List View and expand the menu



5. Click on the button to save the columns as environment default

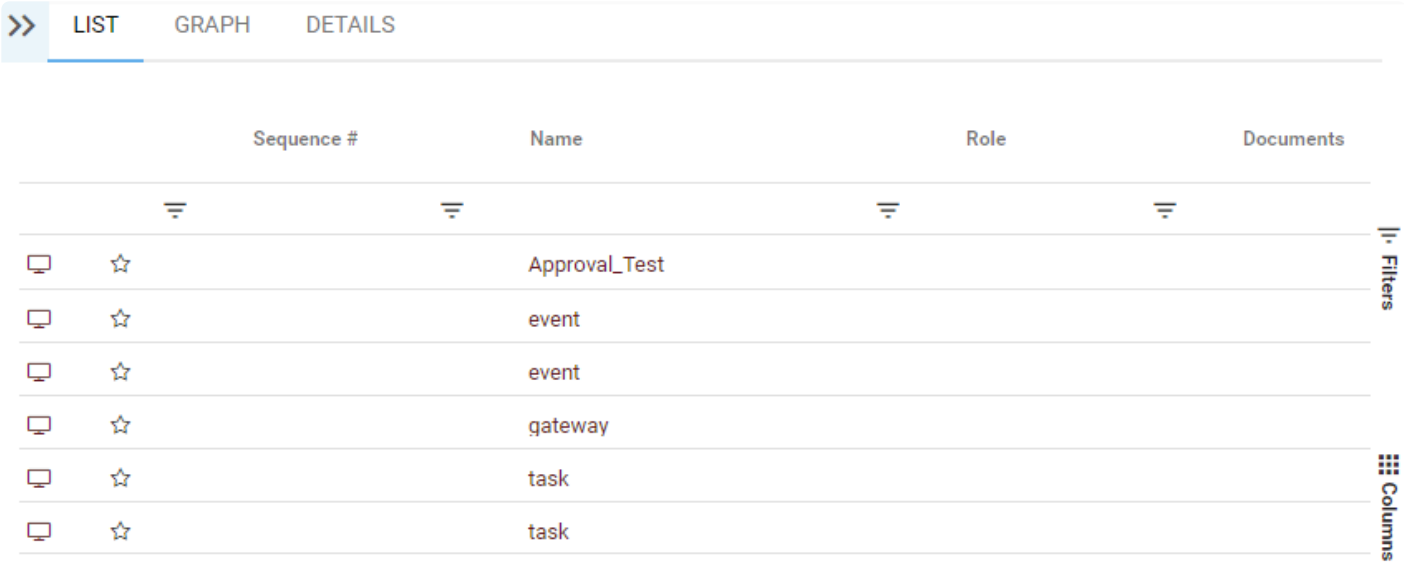


Rule
Filters on columns will not be saved
Only an environment or system level admin can see the button “Save Columns as Environment Default”
If an environment admin does not set the columns per default, then the columns are set to the system setting which we currently show on ag-grid
If an environment admin does not set the columns per default, then the columns are set to the system setting which we currently show on ag-grid

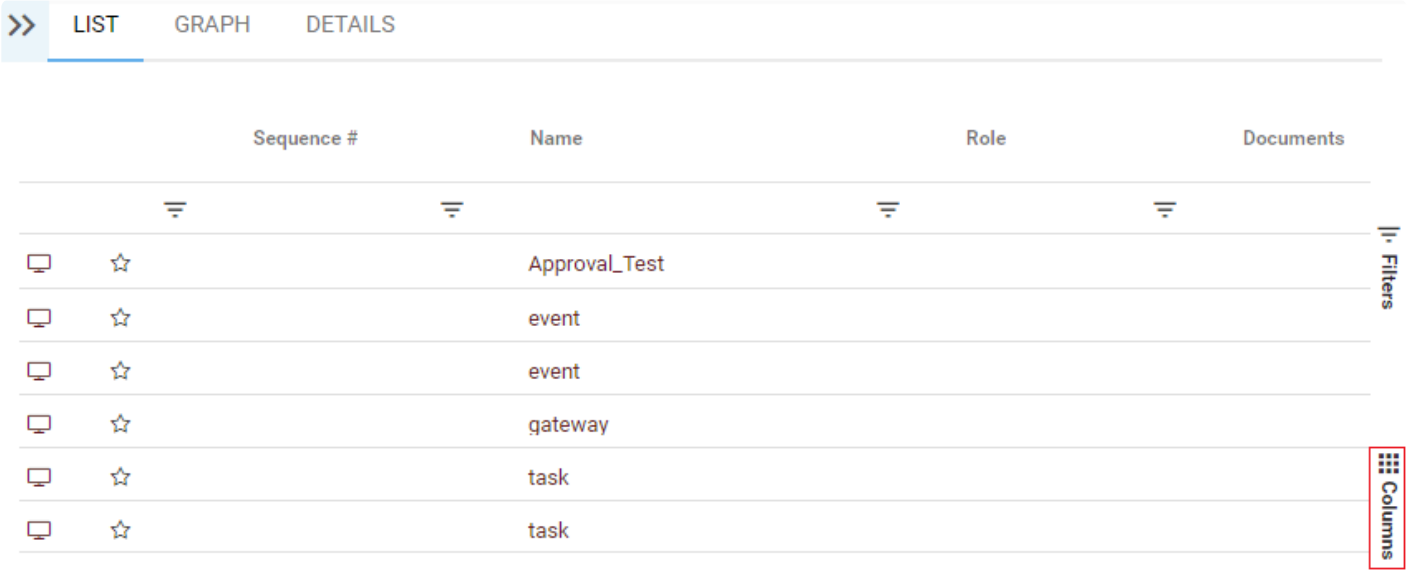
If an environment admin does not set the columns per default, then the columns are set to the system setting which we currently show on ag-grid
An environment admin can modify the order of the columns, add & remove columns before saving it as environment default
If an environment admin clicks “Reset to Default” it will always reset back to system default

12.1.9.5 Reset Columns to Default

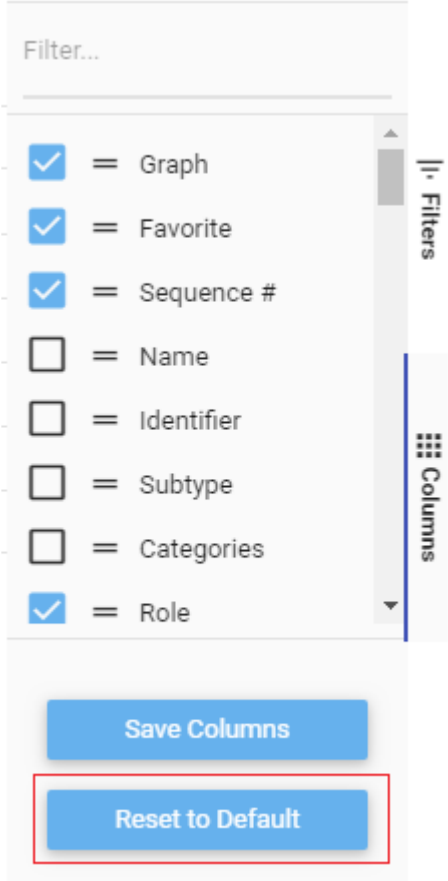
1. Navigate to the list page on any module



2. Once on the list view, click on the Column Panel located to the right

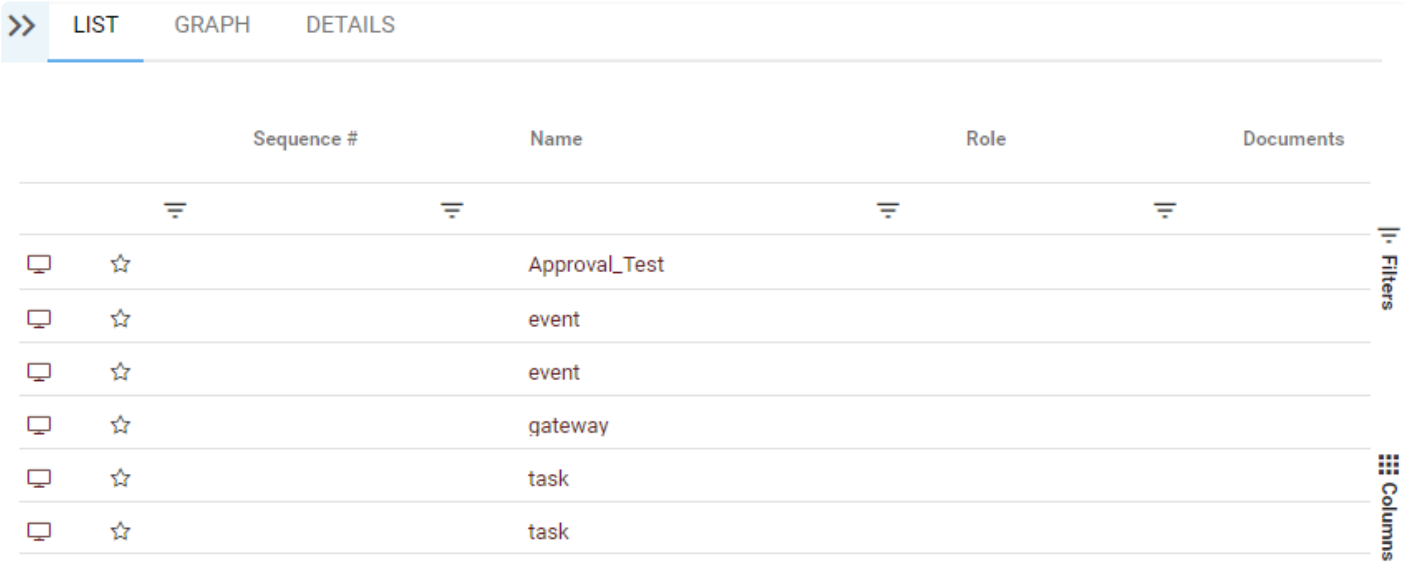


3. Click on the Reset to Default button to reset the column order and selection to system default

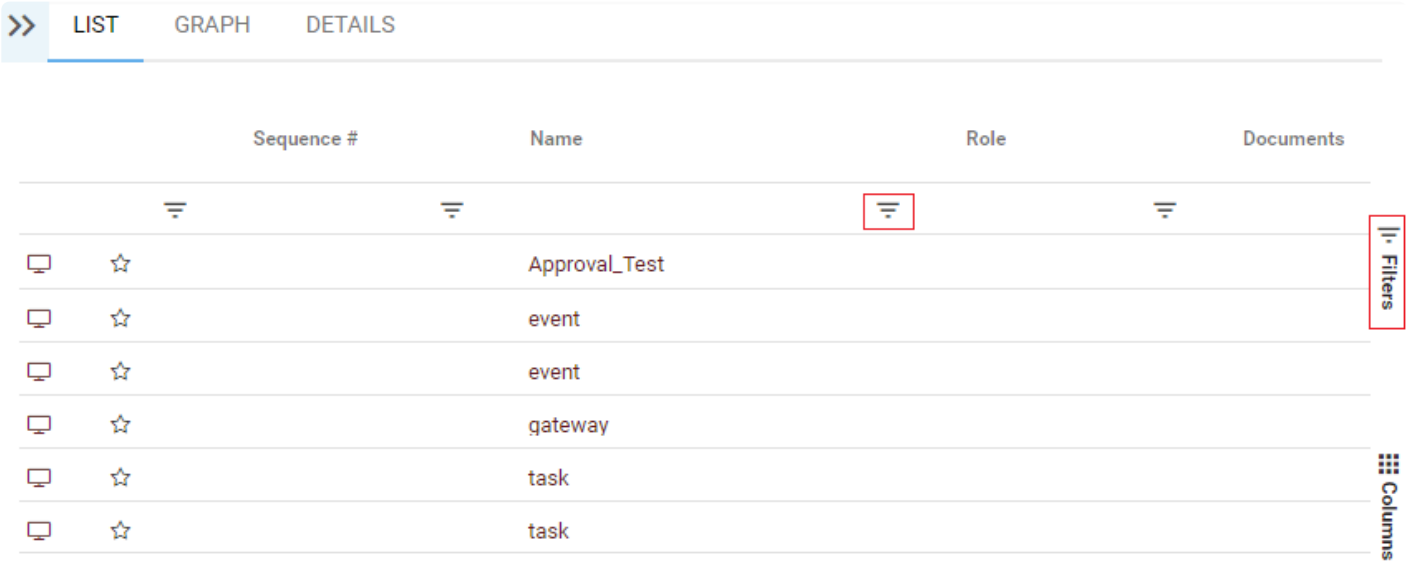

Filter...
Graph
Favorite
Sequence #
Name
Identifier
Subtype
Categories
Role
Filters
Columns
Save Columns
Reset to Default

12.1.9.6 Filtering Columns

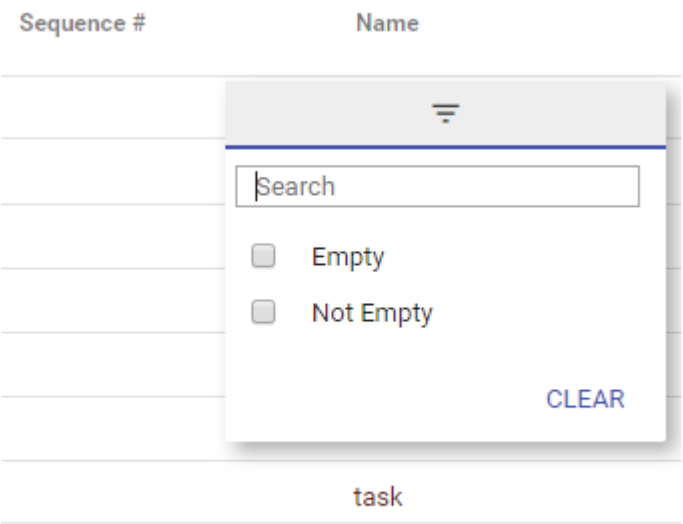
1. Navigate to the list view on any module



2. Once on the list view, either click on the of a column or on the Filters Panel located to the right

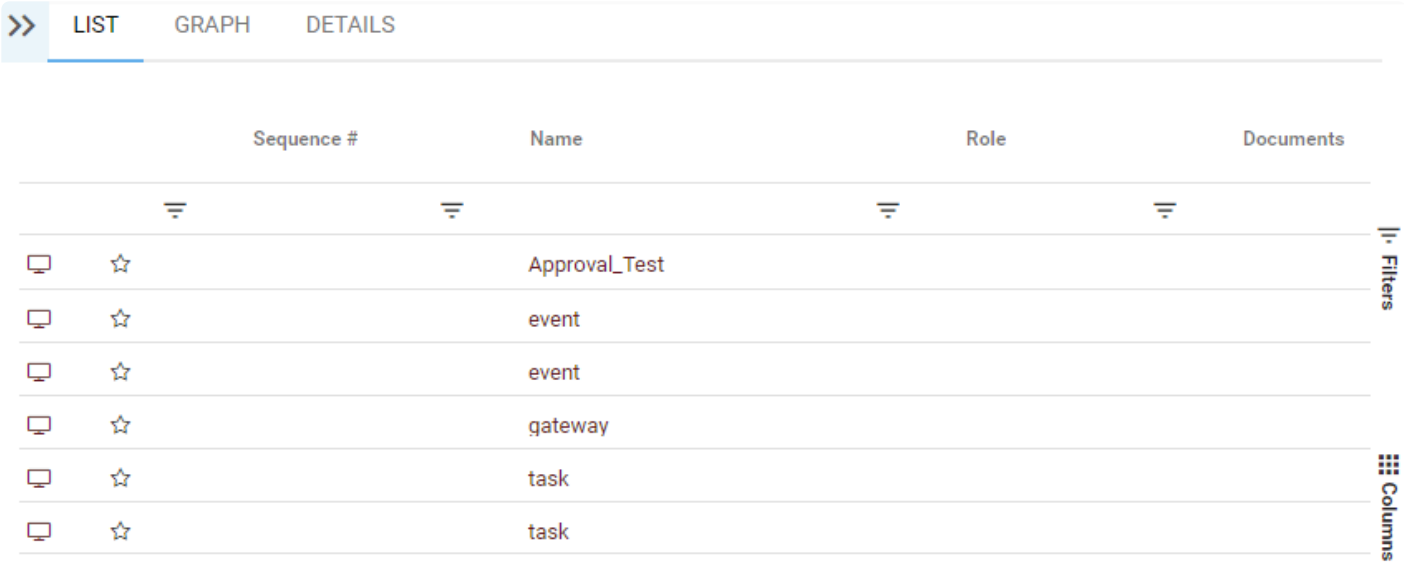


3. Select the filtering options (**Filtering options varies between columns**)

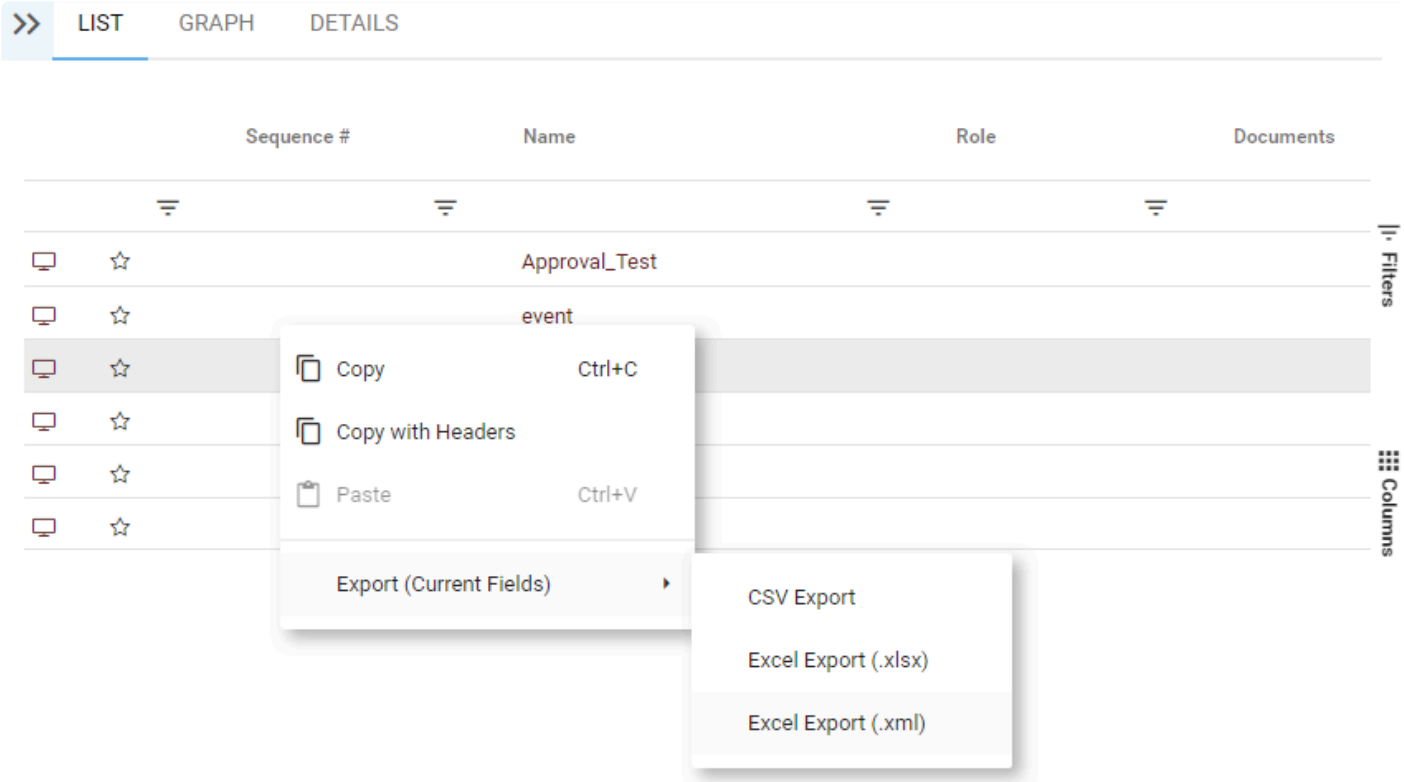

Sequence #
Name
Search
Empty
Not Empty
CLEAR
task

12.1.9.7 Export to Excel (Current Fields)

1. Navigate to the list view on any module



2. Once on the list view, right-click on the list and select Export (Current Field)



Export (Current Fields) only export to excel the columns that are shown in the list and the pages the user has visited

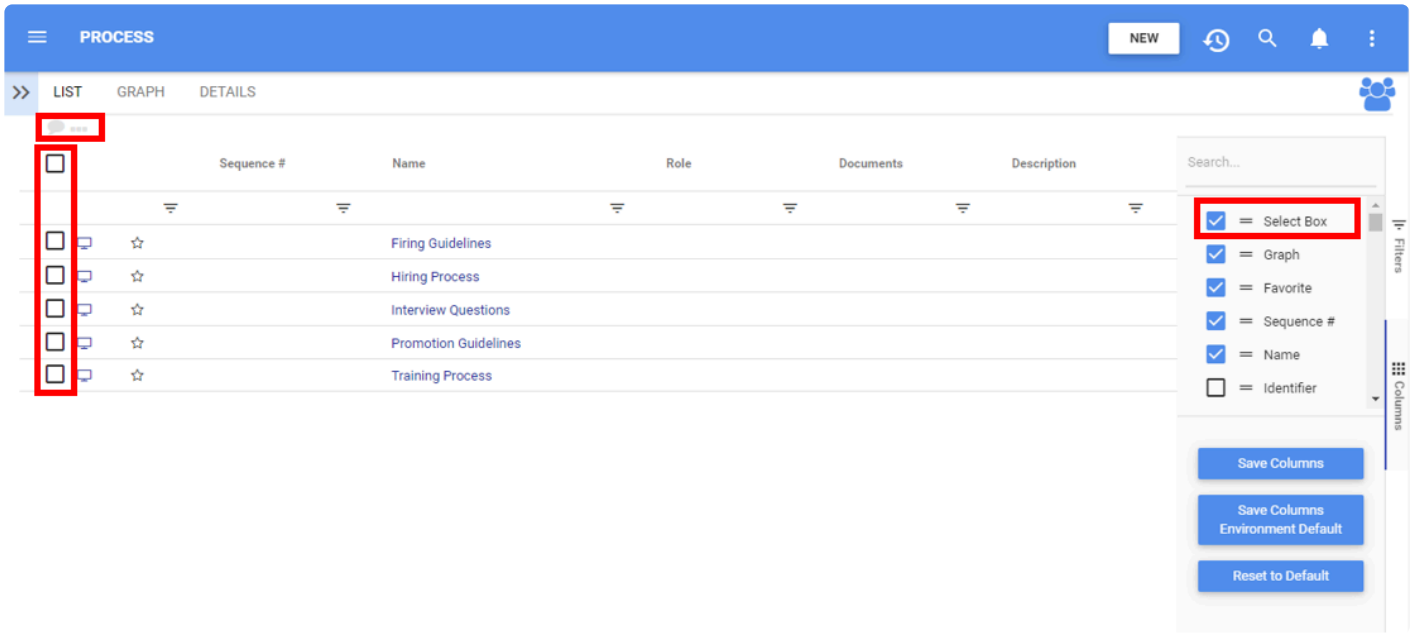
12.1.9.8 Mass Editing

Mass-Editing features allows for multiple/bulk editing on objects on EPC. Features such as Publishing, Collaboration, Responsibility Assignments, Subscription. These features will be accessible through the list view of all modules for all users.

See the following to learn more about each feature:

Mass Publish
Mass Edit Responsibility
Mass Subscribe & Unsubscribe
Mass Collaboration
Mass Delete
Mass Favorite & Unfavorite
Mass Move
Mass Custom Attributes

To use these features, a user is required to simply check on “Select Box”, found in the column box of the list view, to enable a list of check boxes. Once appeared, a user is required to select at least one object to to enable the icons on the page header. A list of options will be available to choose from.

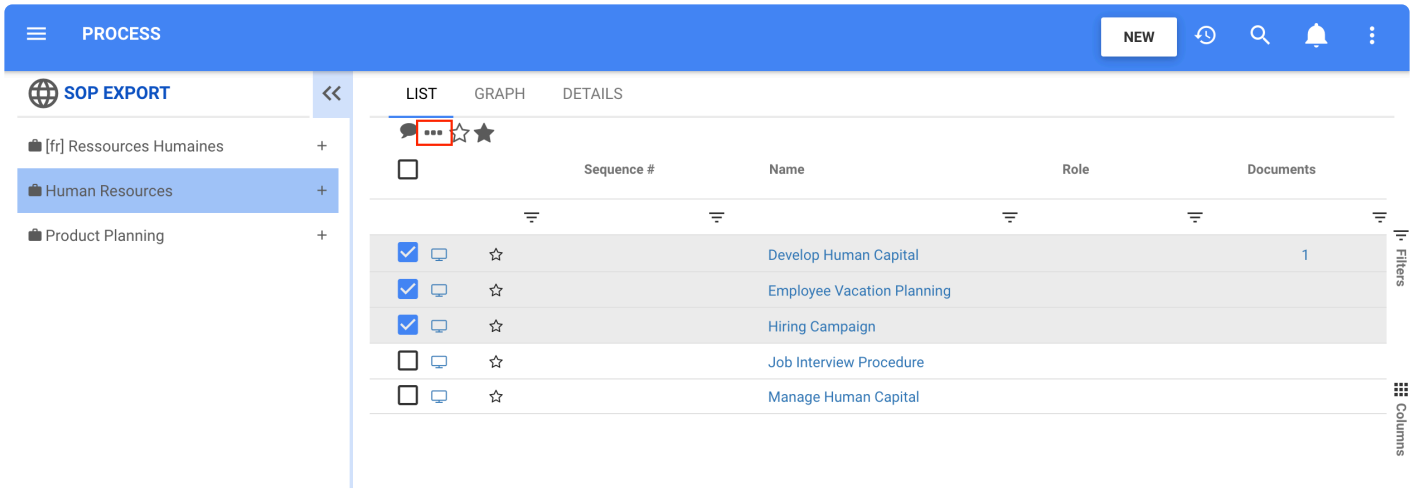


12.1.9.8.1 Mass Publish

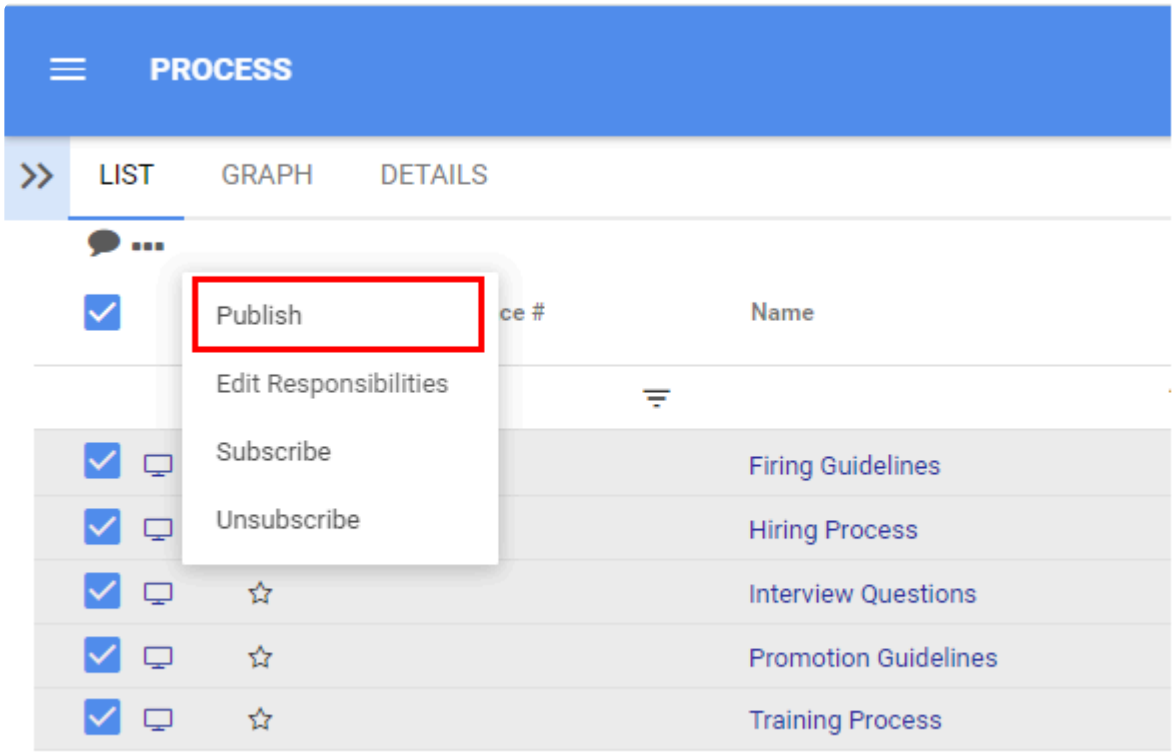
The Mass-Publish feature will allow you to publish more than one object through a single interaction.

It is important to note that all objects selected will have the same publishing characteristics; once published, the system will require you to choose between publishing the objects as minor or major while the publishing comment will be the same for all selected objects as well.

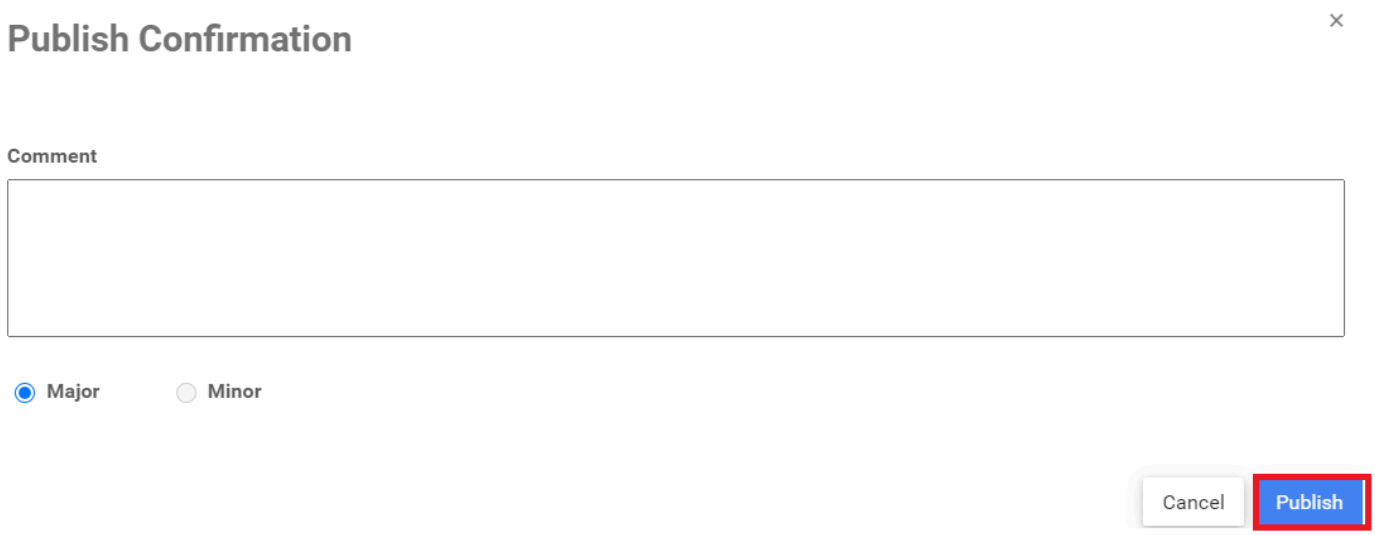
1.Select the **three-dot** icon on the page header.



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



3.The Publish Confirmation window for the object will be generated. You can input a comment and click on the **Publish** button to publish the selected object/s.

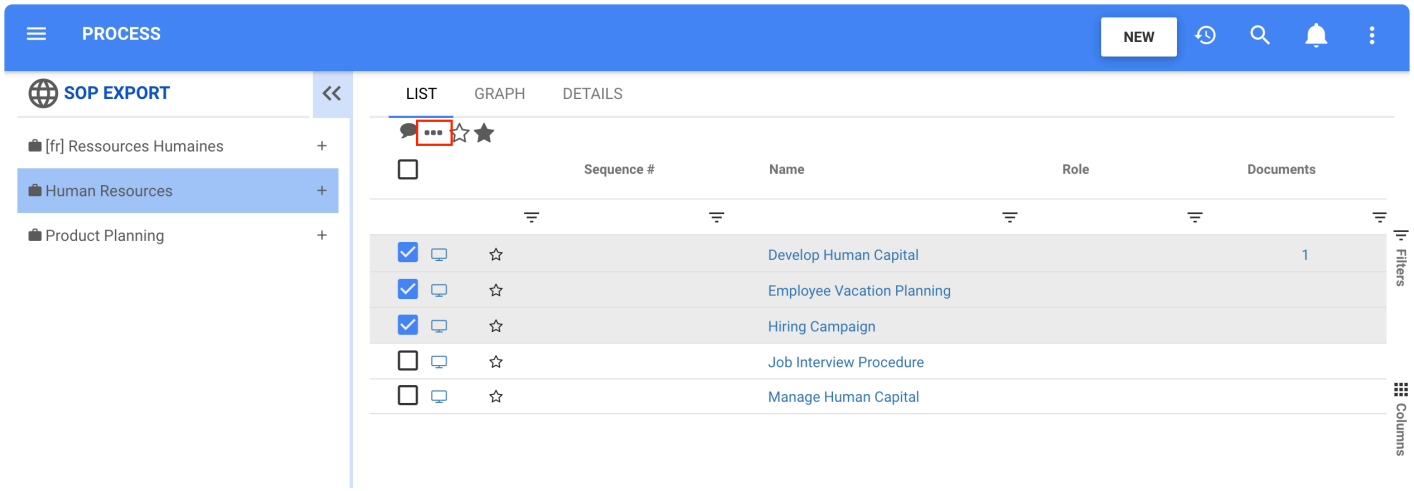


12.1.9.8.2 Mass Edit Responsibility

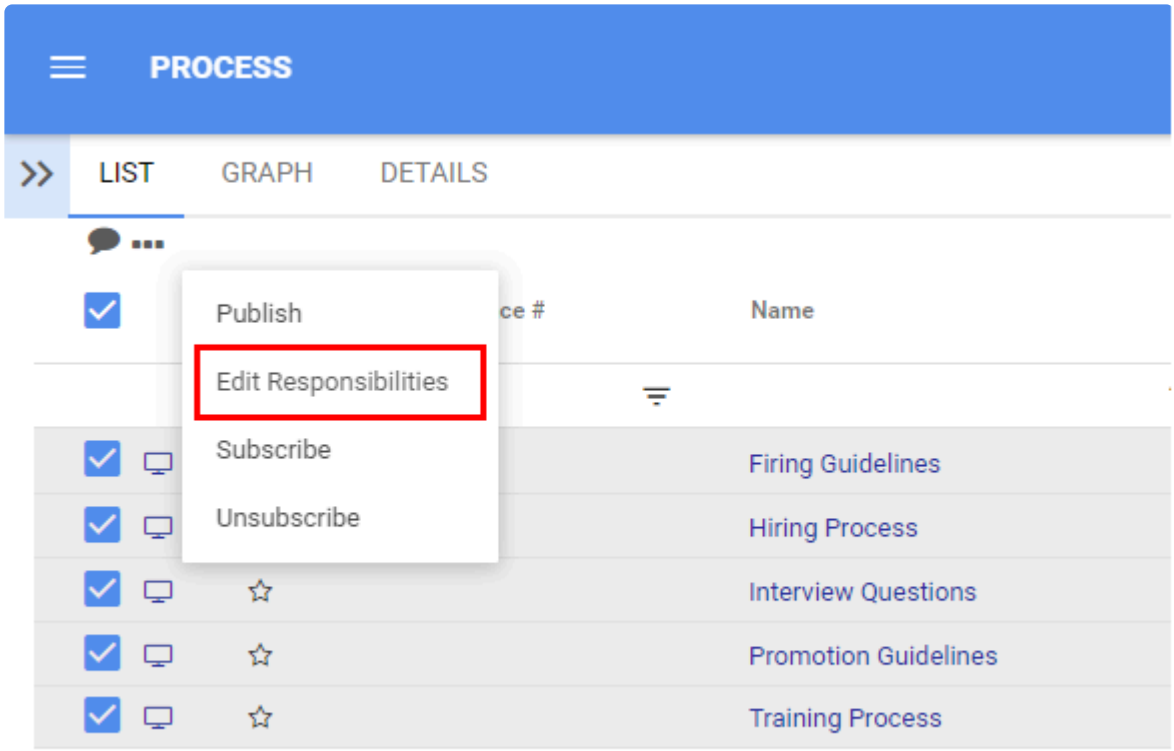
The Mass-Assignment feature will allow you to assign the same RASCI for more than one object through a single interaction.

A RASCI matrix will appear and the user will be capable of adding resources, roles, organization units and assets to assign or edit responsibilities. It is important to note that sets and folders will be ignored if selected as they cannot be assigned RASCI. Additionally, objects which are locked, in review, do not have write permission or are in an approval cycle will also be ignored.

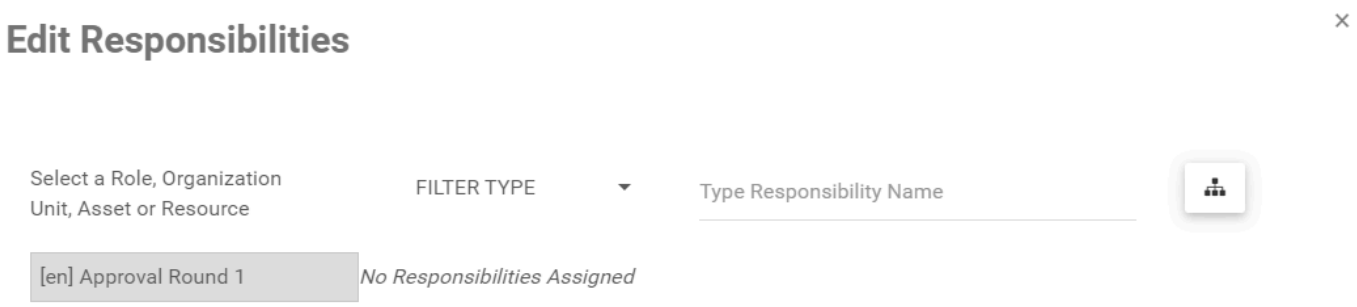
1.Select the **three-dot** icon on the page header.



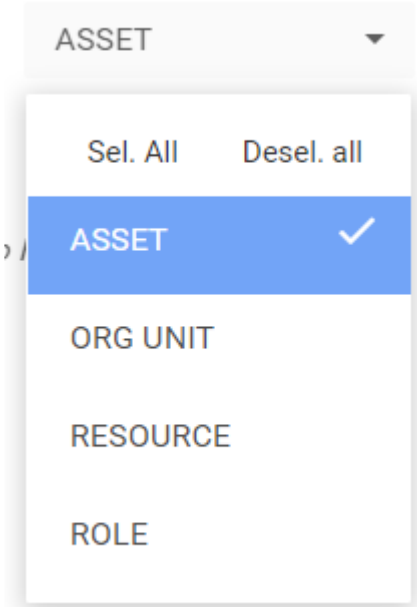
2.Click on **Edit Responsibility** from the dropdown menu.



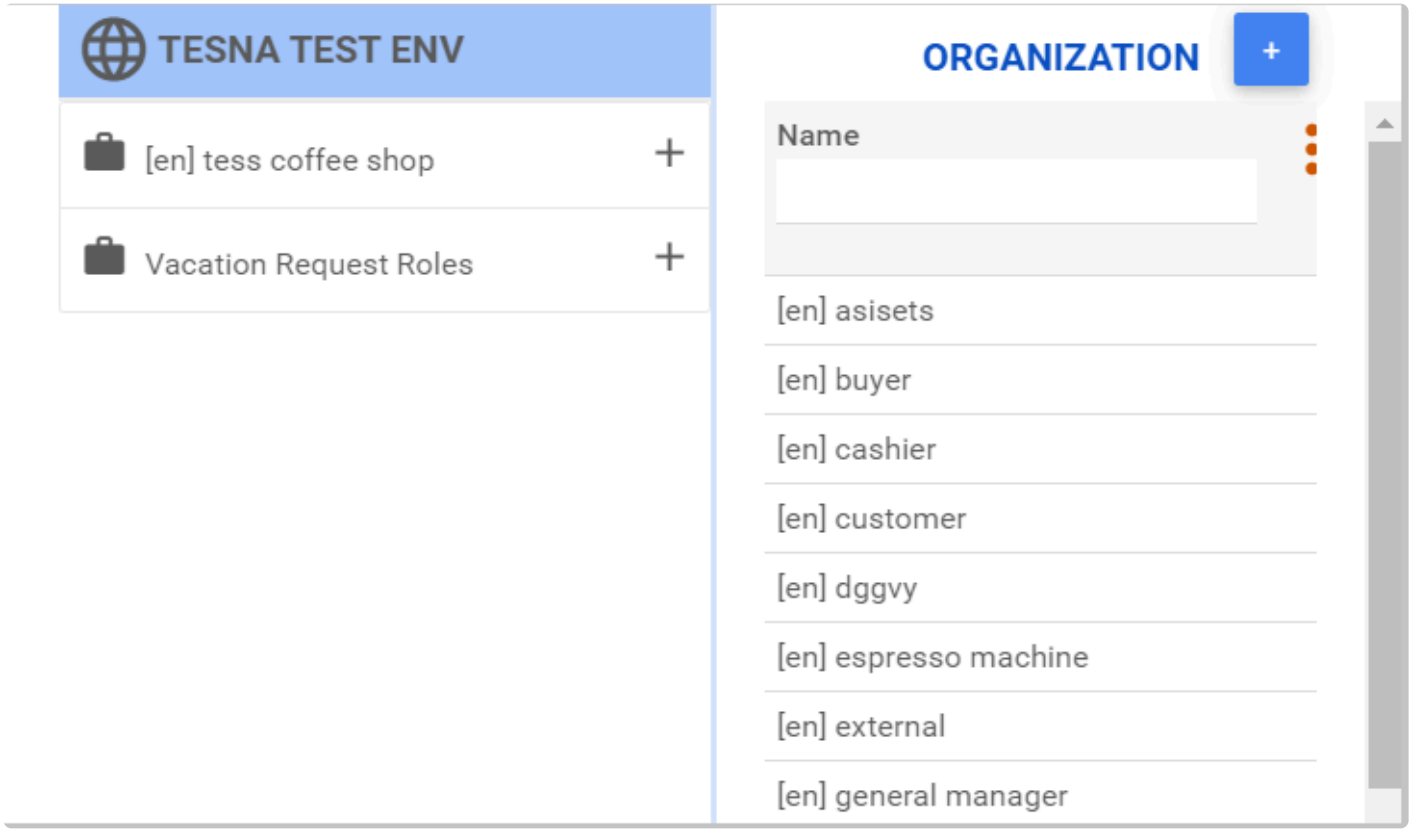
3.You will be directed to the edit responsibilities window.



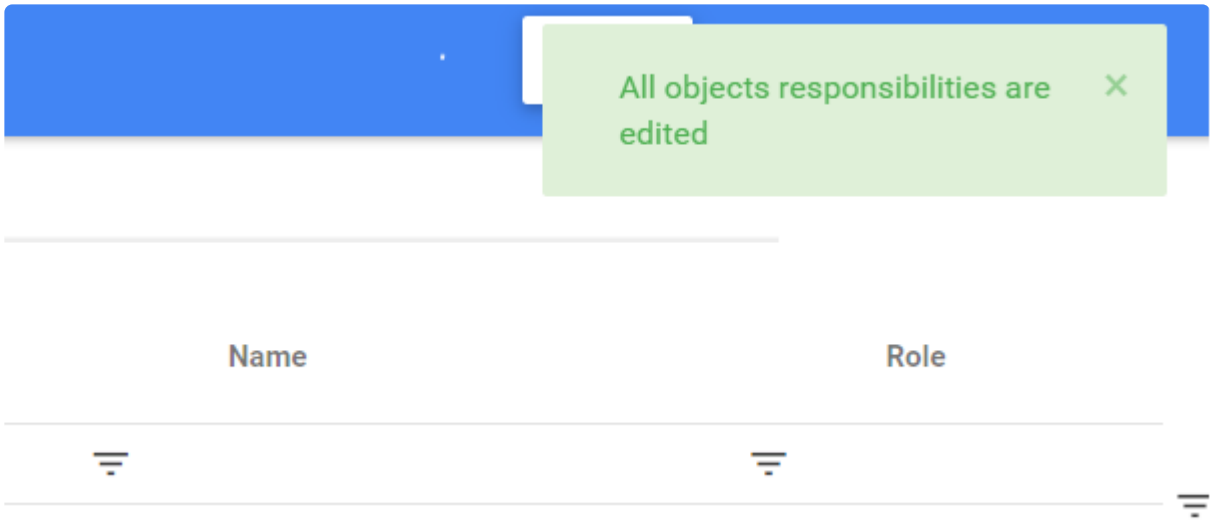
3A. The filter allows the user to select a resource, role, asset and organizational unit.



3B. The tree selector allows users to browse organizational objects and select them.



4.Click on **Done** then the responsibilities of the objects will be edited and you will receive a notification saying **All objects responsibilities are edited**.

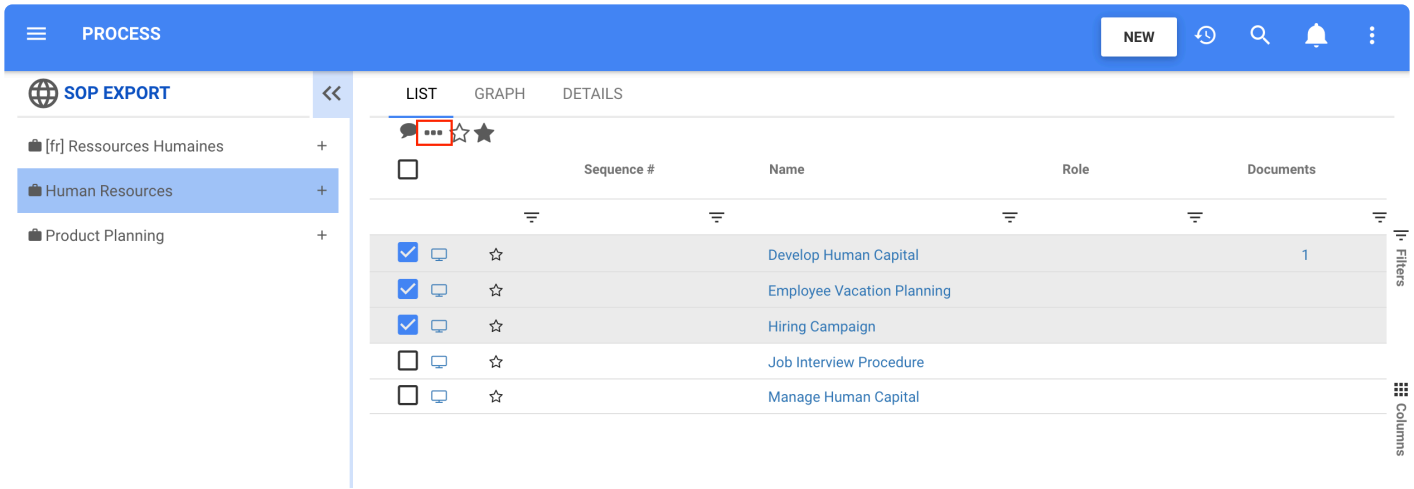

All objects responsibilities are edited
Name
Role

12.1.9.8.3 Mass Subscribe/Unsubscribe

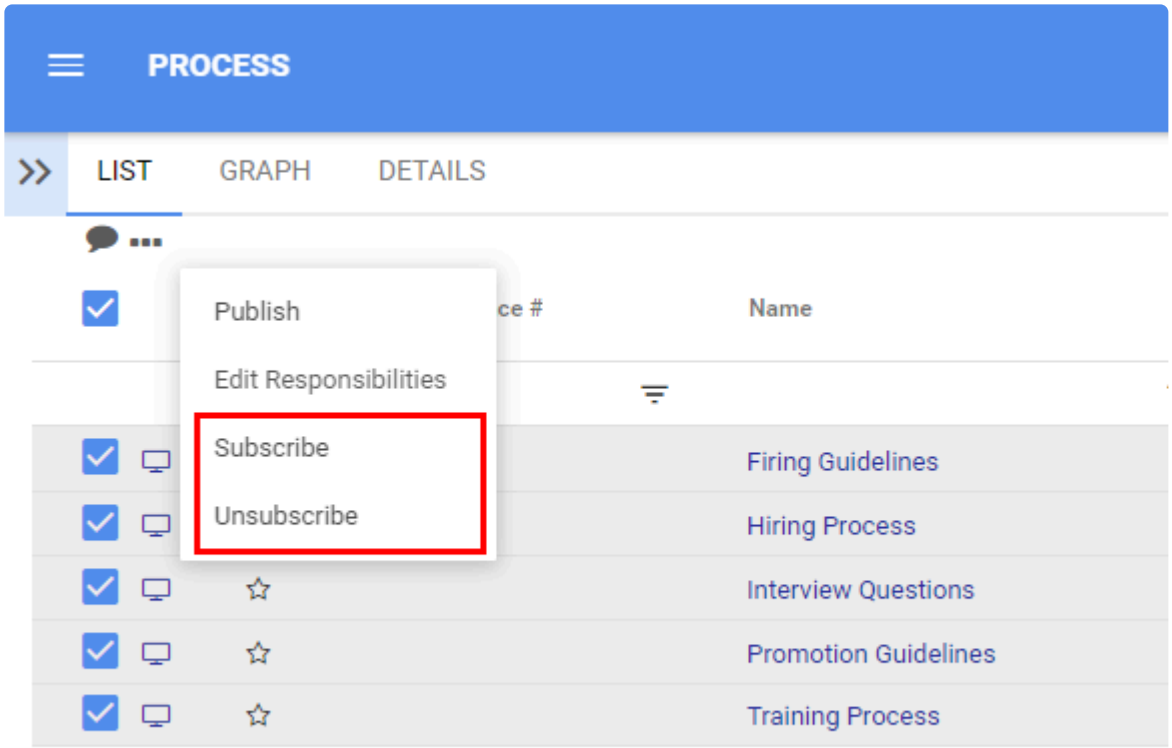
The Mass-Subscribe/Unsubscribe feature will allow you to subscribe/unsubscribe to more than one object through a single interaction.

When selecting multiple objects whether they were originally already subscribed or not, all non-subscribed objects will be subscribed while the ones previously subscribed will remain the same. The same logic follows for the unsubscribed option.

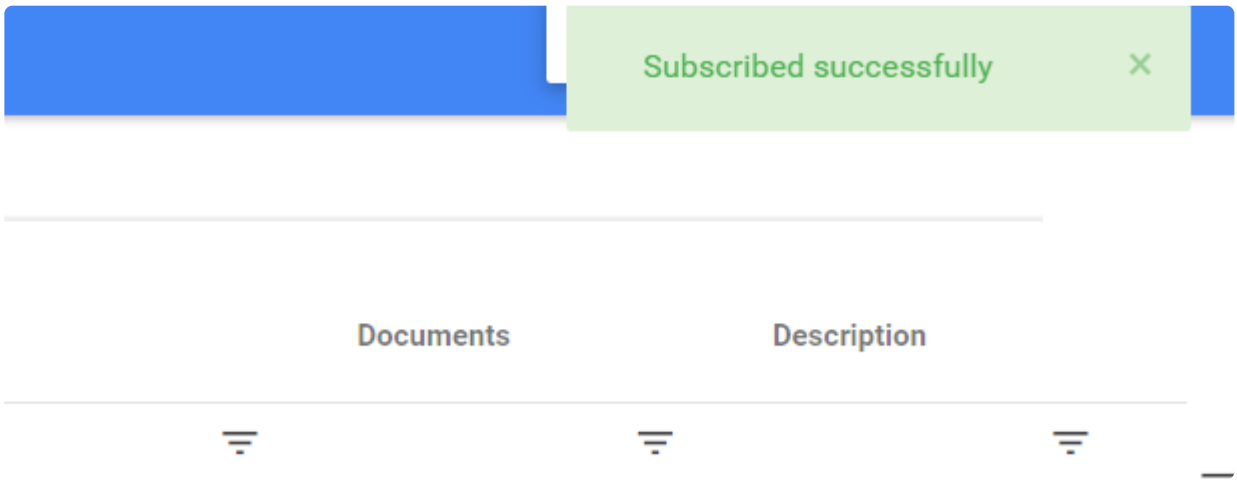
1.Select the **three-dot** icon on the page header.



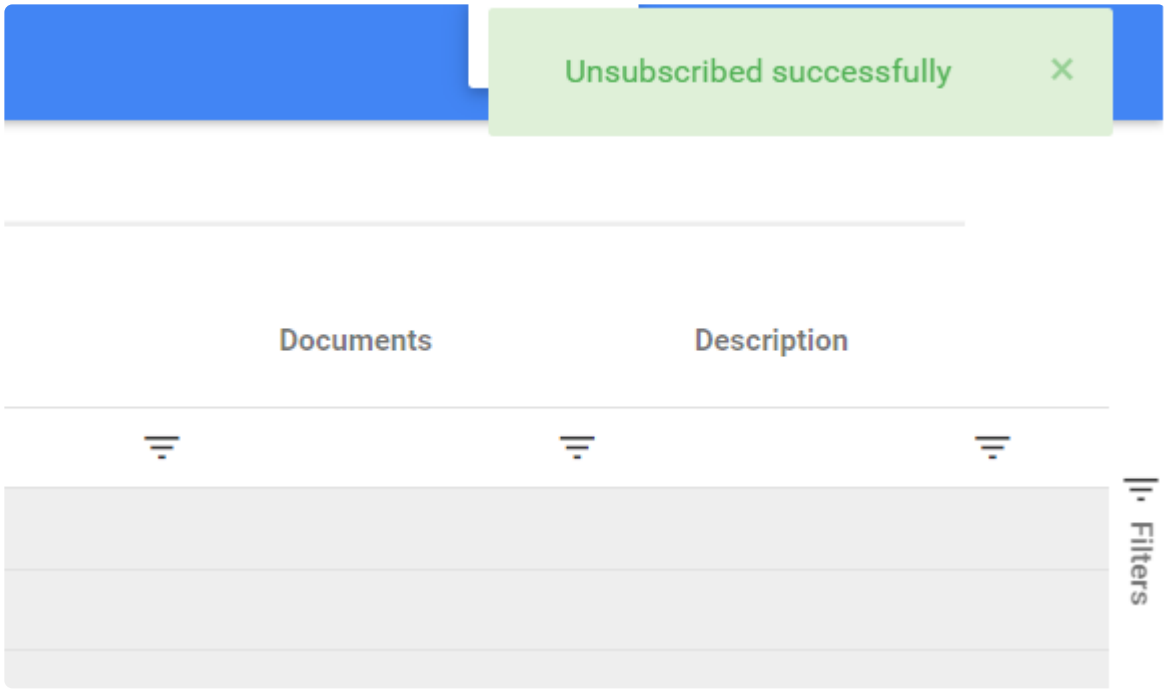
2.Click on **Subscribe/Unsubscribe** from the dropdown menu.



3.When you click on subscribe button the object will be subscribed and you will receive a notification saying the object was successfully subscribed.



4.When you click on unsubscribe button the object will be unsubscribed and you will receive a notification saying the object was successfully unsubscribed.

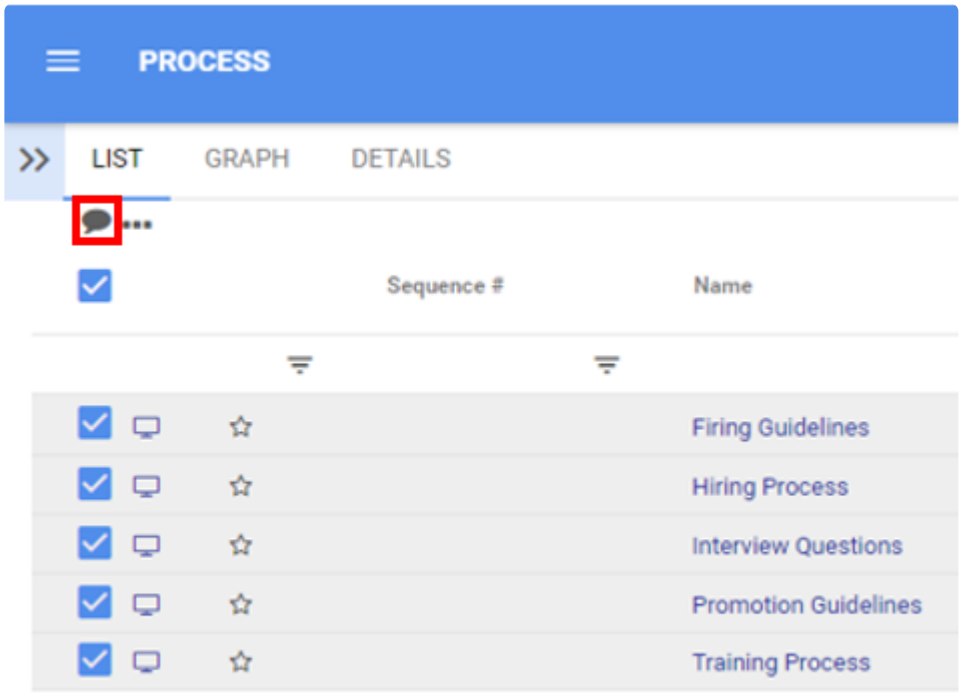

Unsubscribed successfully
Documents
Description
Filters

12.1.9.8.4 Mass Collaboration

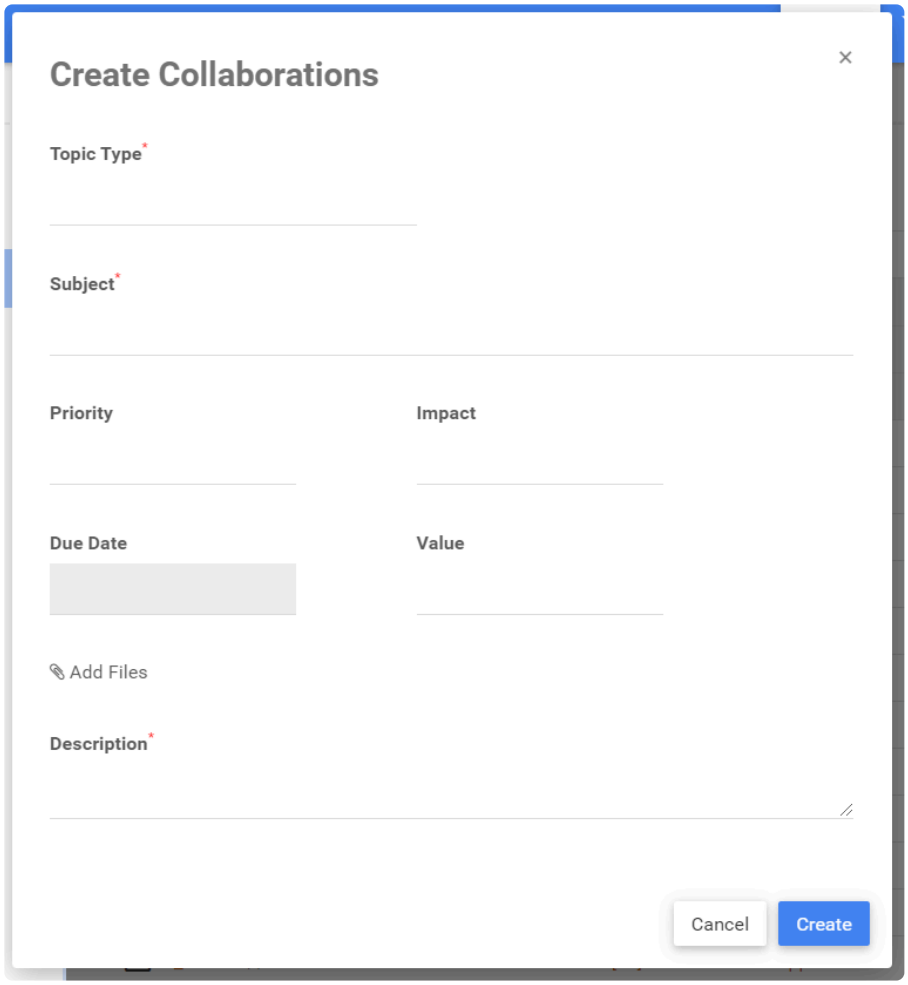
The Mass-Collaboration feature will allow you to create a collaboration post for more than one object through a single interaction.

A group collaboration post will exist in the collaboration module for access, allowing users to see all posts created for all selected objects within that transaction. Unlike other multi-features; this interaction will all be processed in either a single transaction or none; in other words, if more than one object cannot be part of the collaboration post for any reason, the group and the post for all objects will not be created.

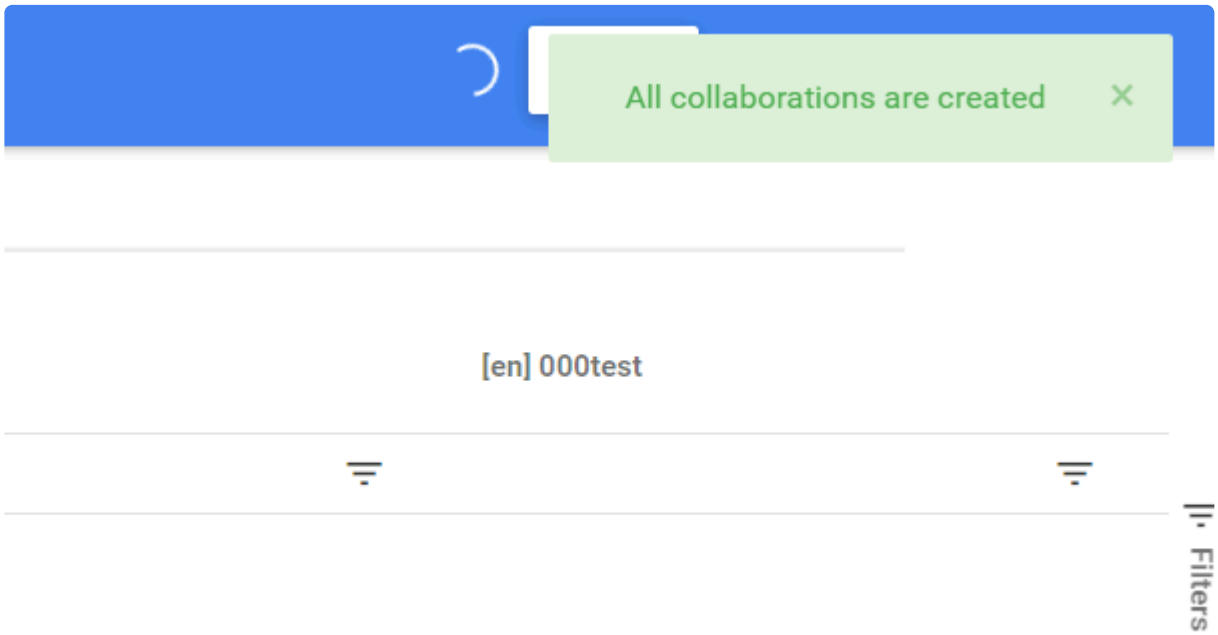
1.Select the **Collaboration** icon on the page header.



2.You will be directed to the window where you can **Create Collaborations**, then input collaborations and click on the **Create button**.



3.You will receive a notification saying **All collaborations are created**.

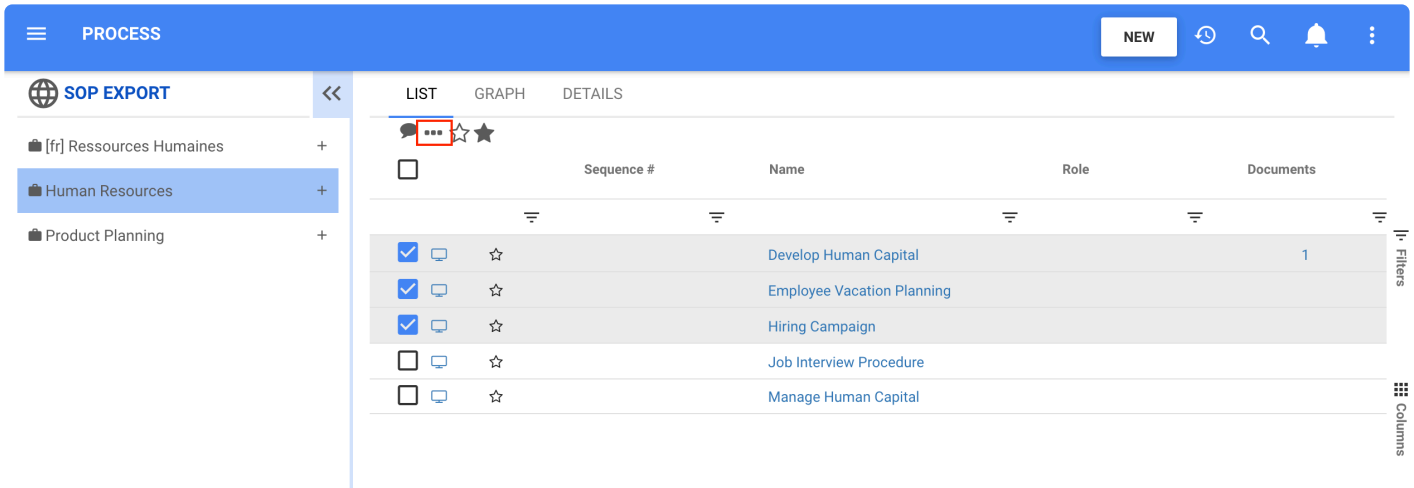


12.1.9.8.5 Mass Delete

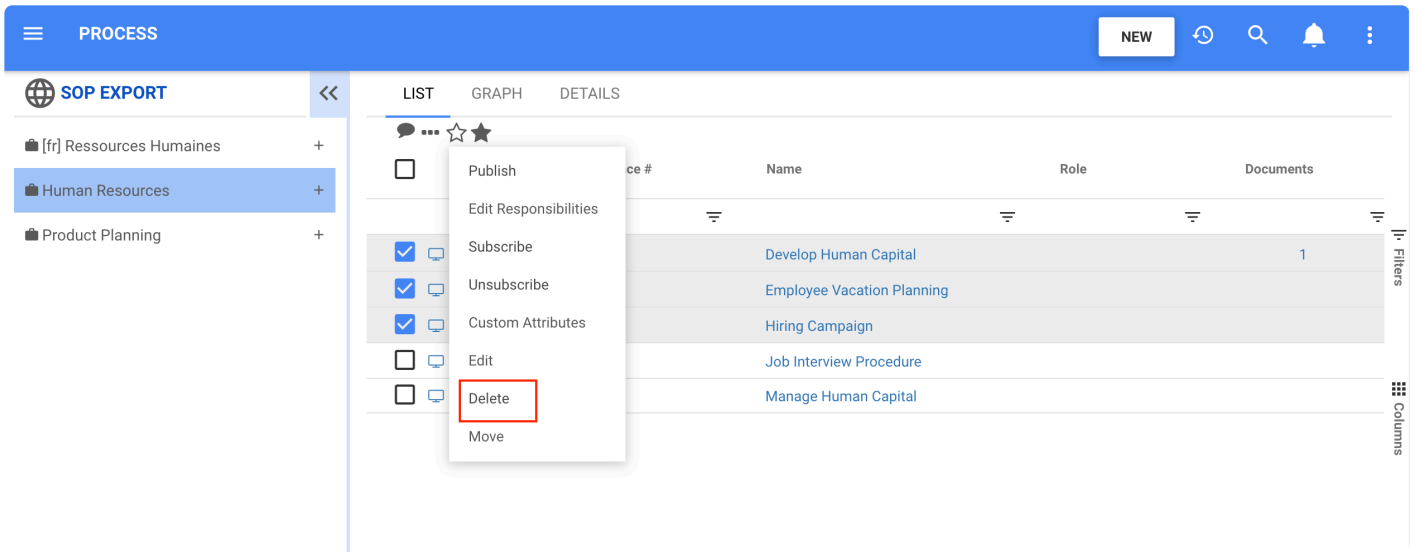
The Mass-Delete feature will allow you to delete more than one object through a single interaction.

Once an object is deleted, that will remove all existing associations and also its children objects.

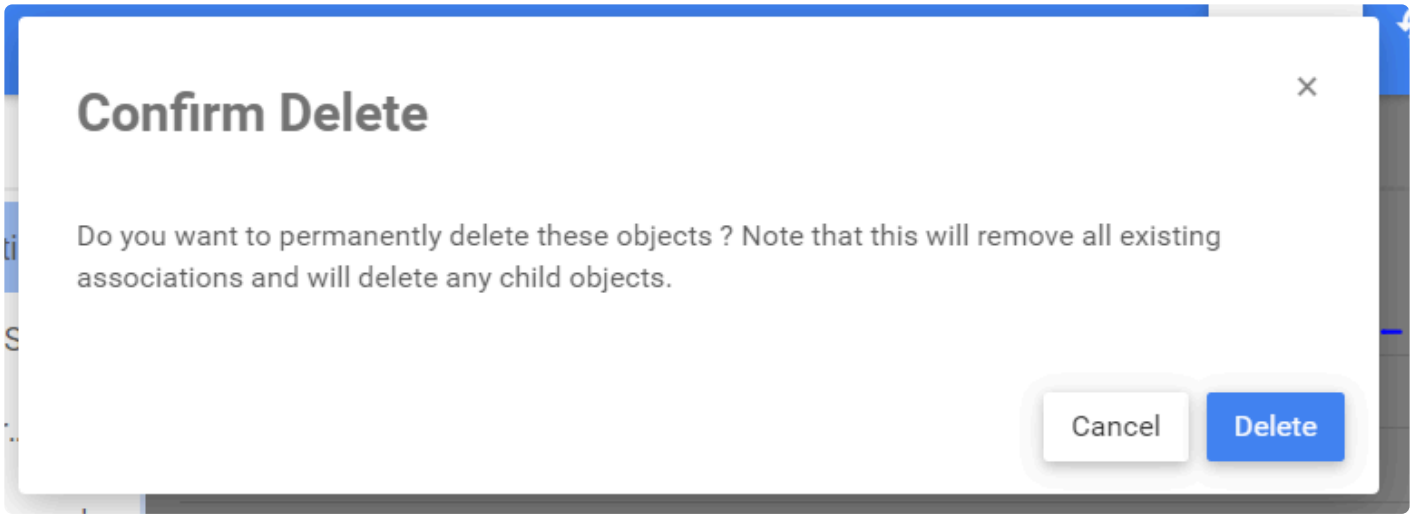
1.Select the **three-dot** icon on the page header.



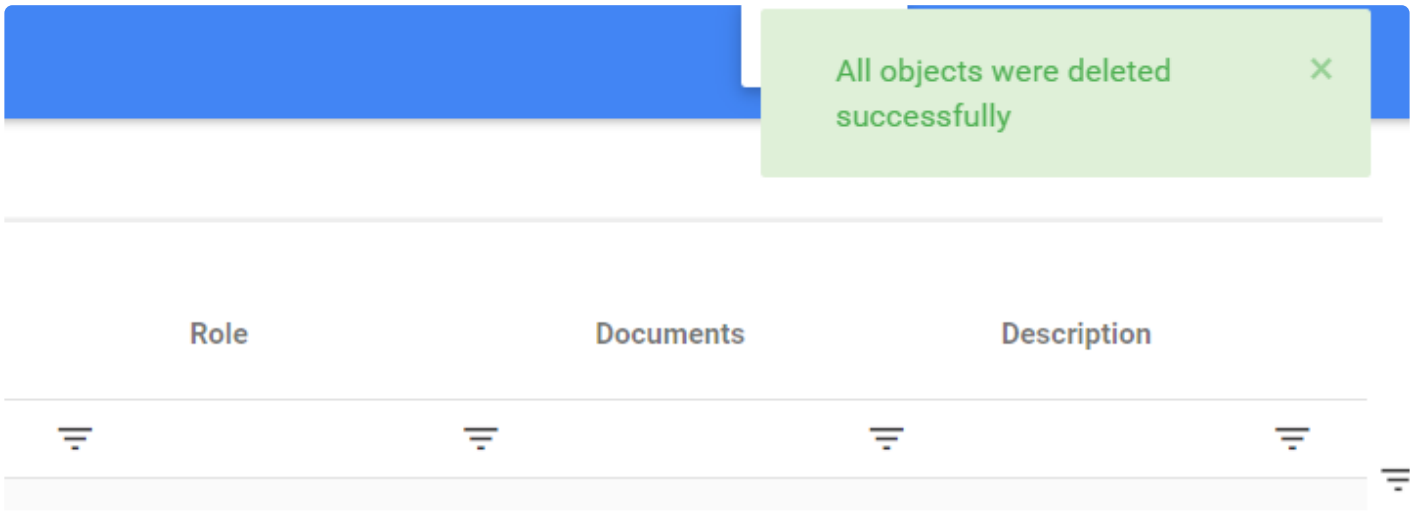
2.Click on **Delete** from the dropdown menu.



3.The following box will appear and you will be able to delete the objects by clicking on the **Delete** button.



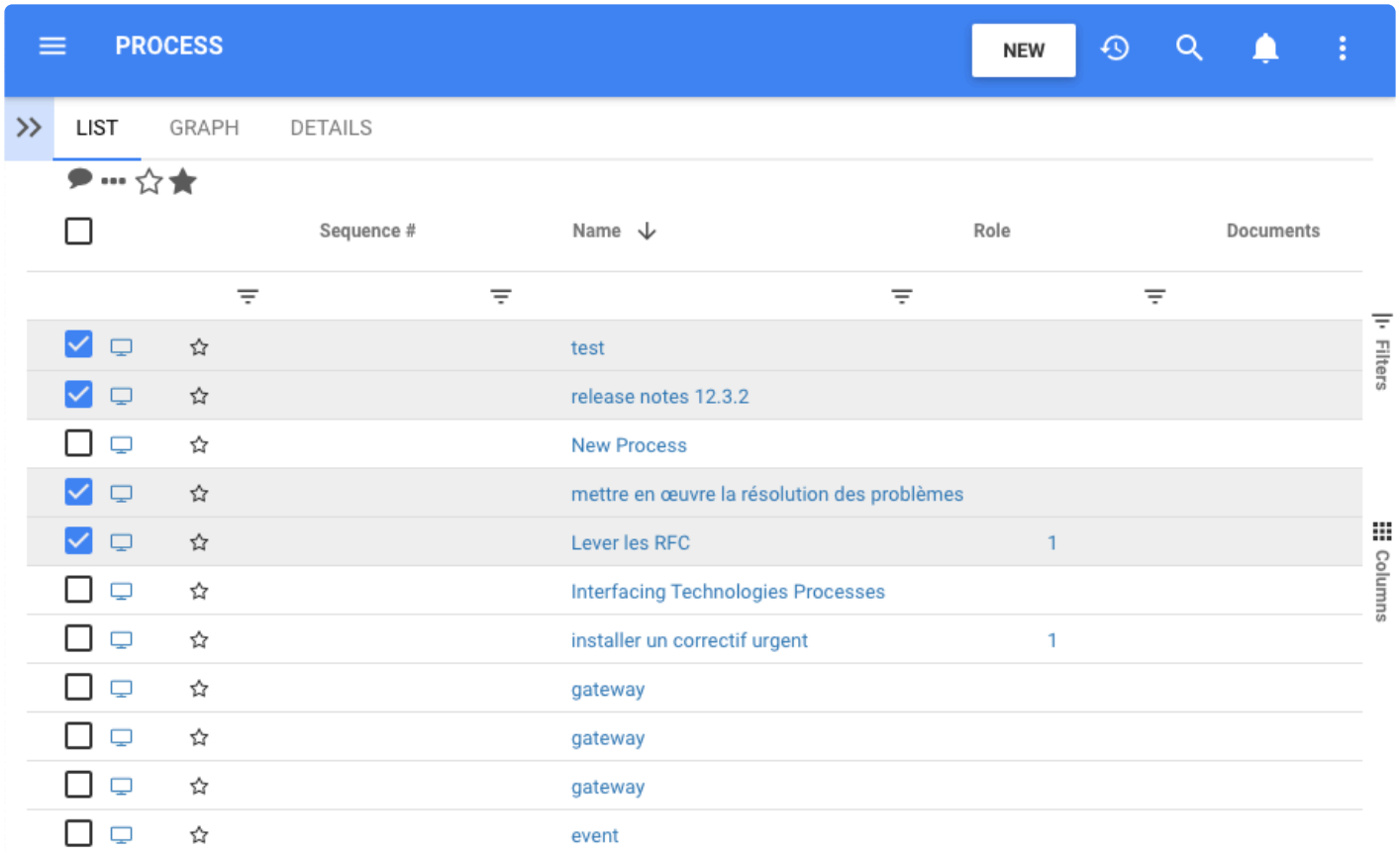
4.You will receive a notification saying **All objects were deleted successfully**.



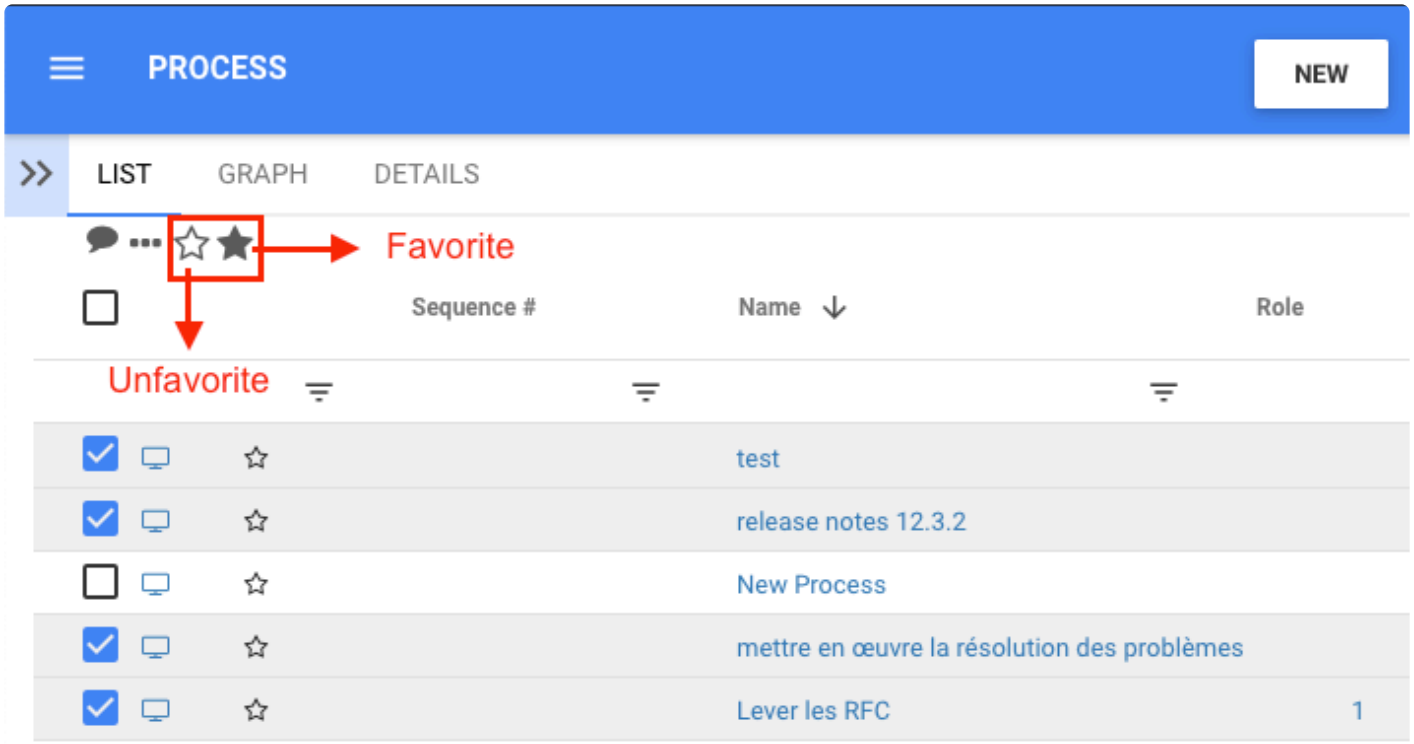
12.1.9.8.6 Mass Favorite/Unfavorite

The Mass-Favorite/Unfavorite feature will allow you to Favorite/Unfavorite more than one object through a single interaction.

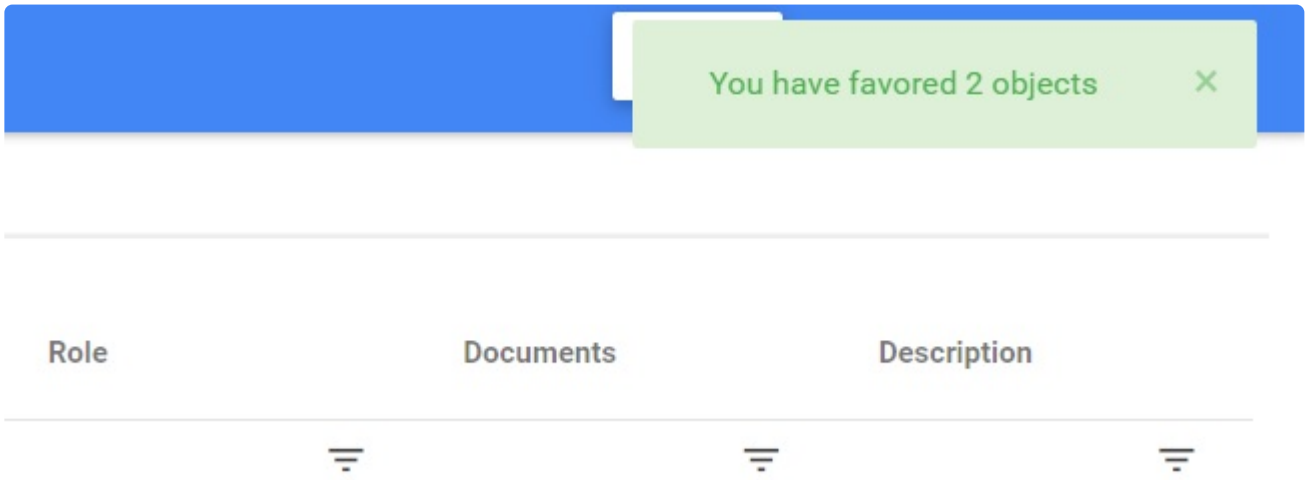
1.Select the objects you want to Mass Favorite/Unfavorite



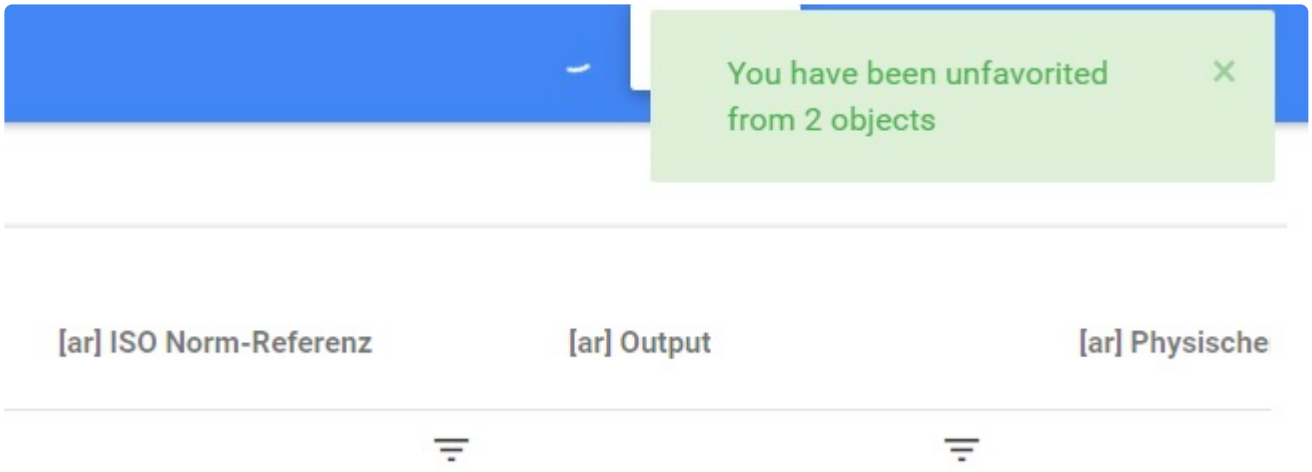
2.Click on **Favorite/Unfavorite**.



3.When you click on Favorite the objects will be Favored and you will receive a notification saying **You have favored objects**.



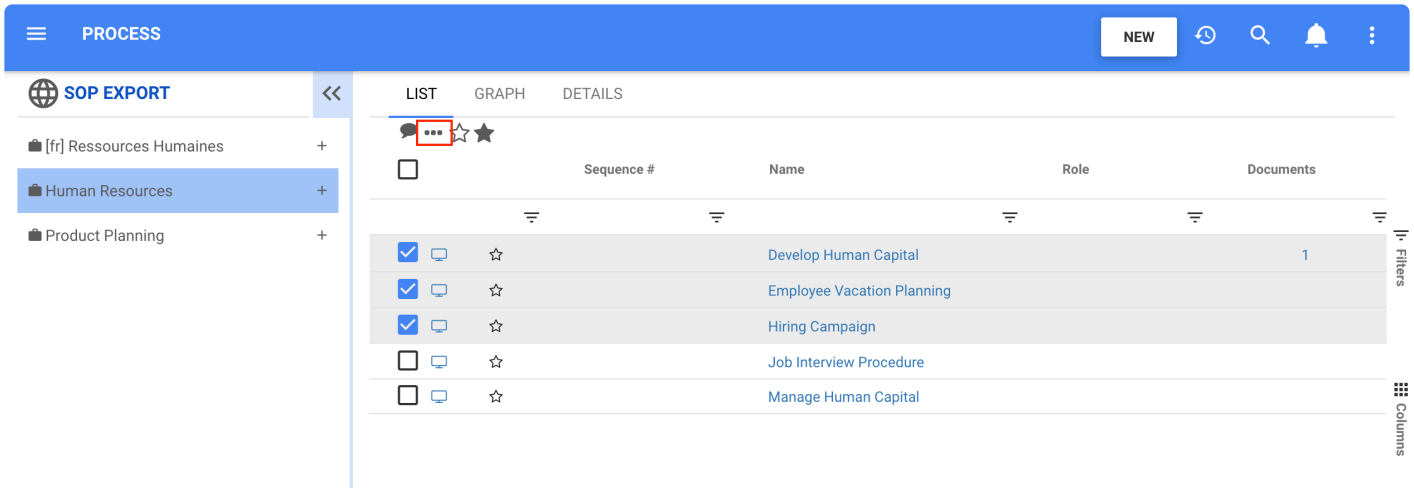
4.When you click on Unfavorite the objects will be Unfavorited and you will receive a notification saying **You have been Unfavorited from objects**.


You have been unfavorited from 2 objects
[ar] ISO Norm-Referenz
[ar] Output
[ar] Physische

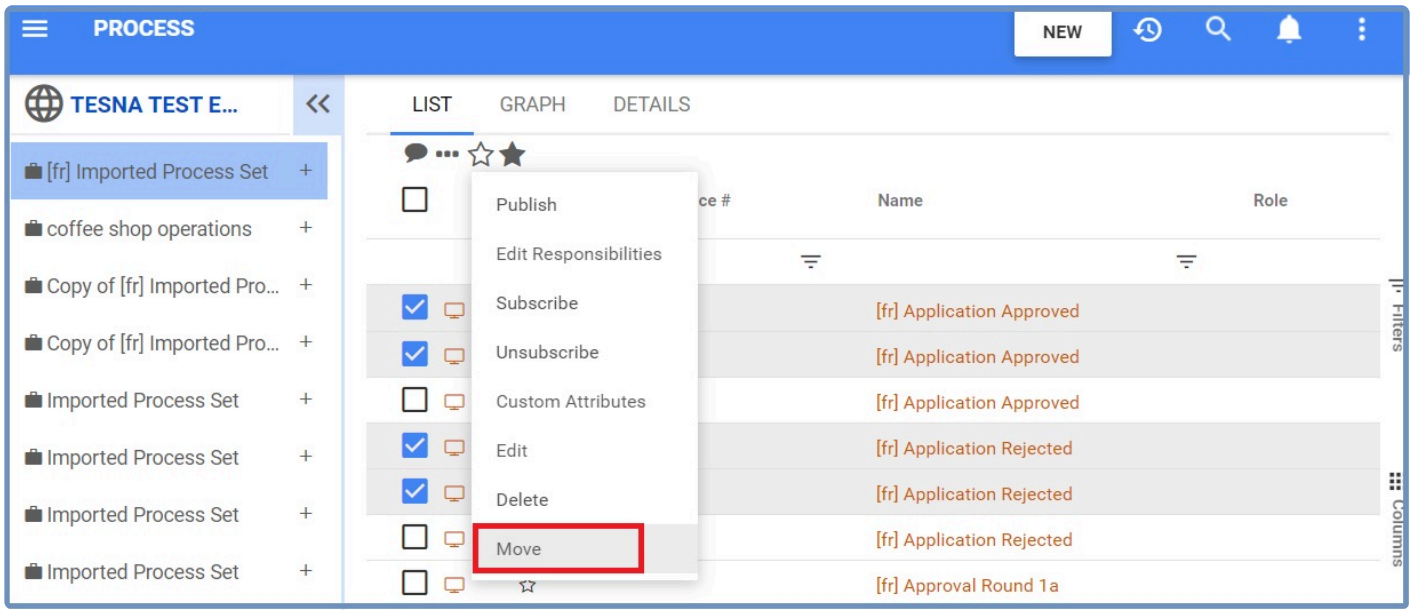
12.1.9.8.7 Mass Move

In List view, editors can select one or more objects to be moved under one same parent.

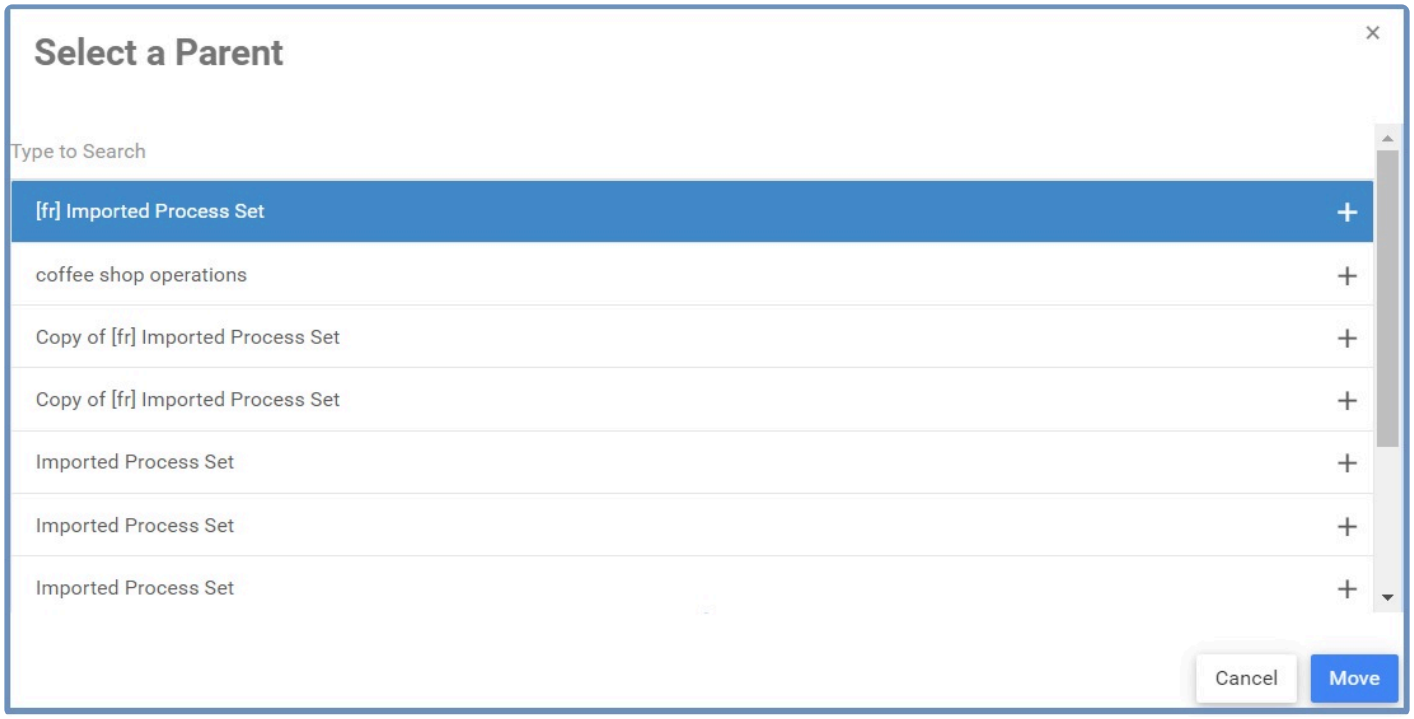
1. Choose 1 or more objects by marking the **checkbox** of the objects to be moved and select the **three-dot** icon on the page header.



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

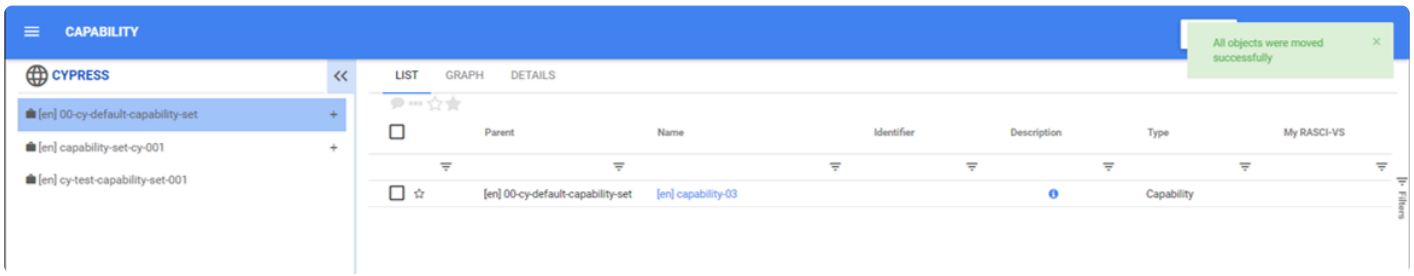


3. Select the logical parent where you wish to **Move** the objects.



4. Click on the **Move** button.

5. A confirmation notification will appear to confirm that the objects have been move successfully.

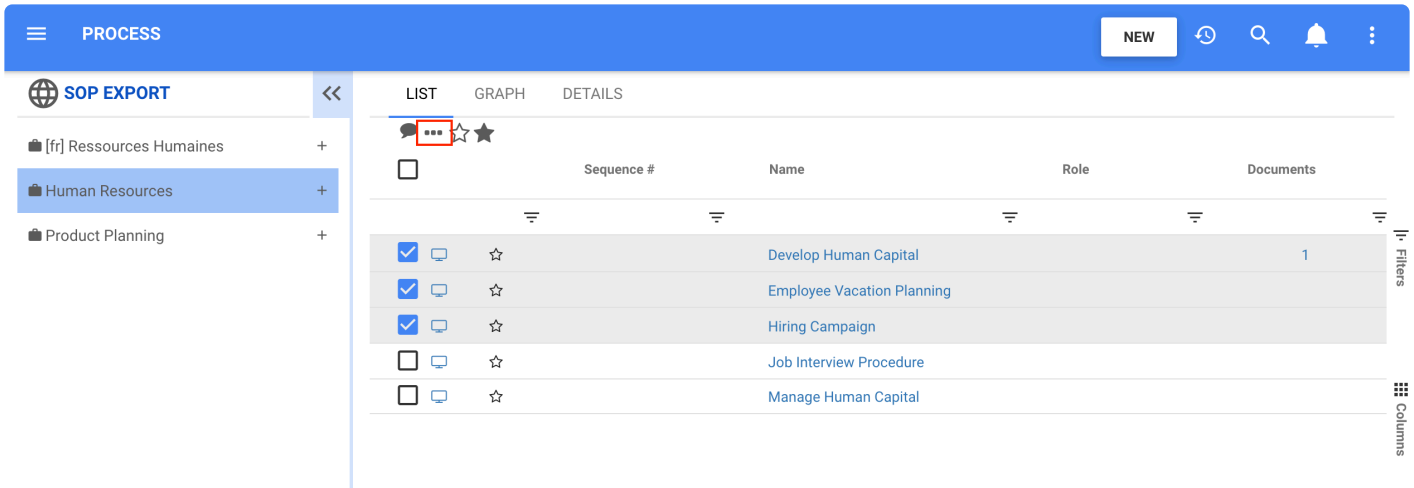


12.1.9.8.8 Mass Custom Attributes

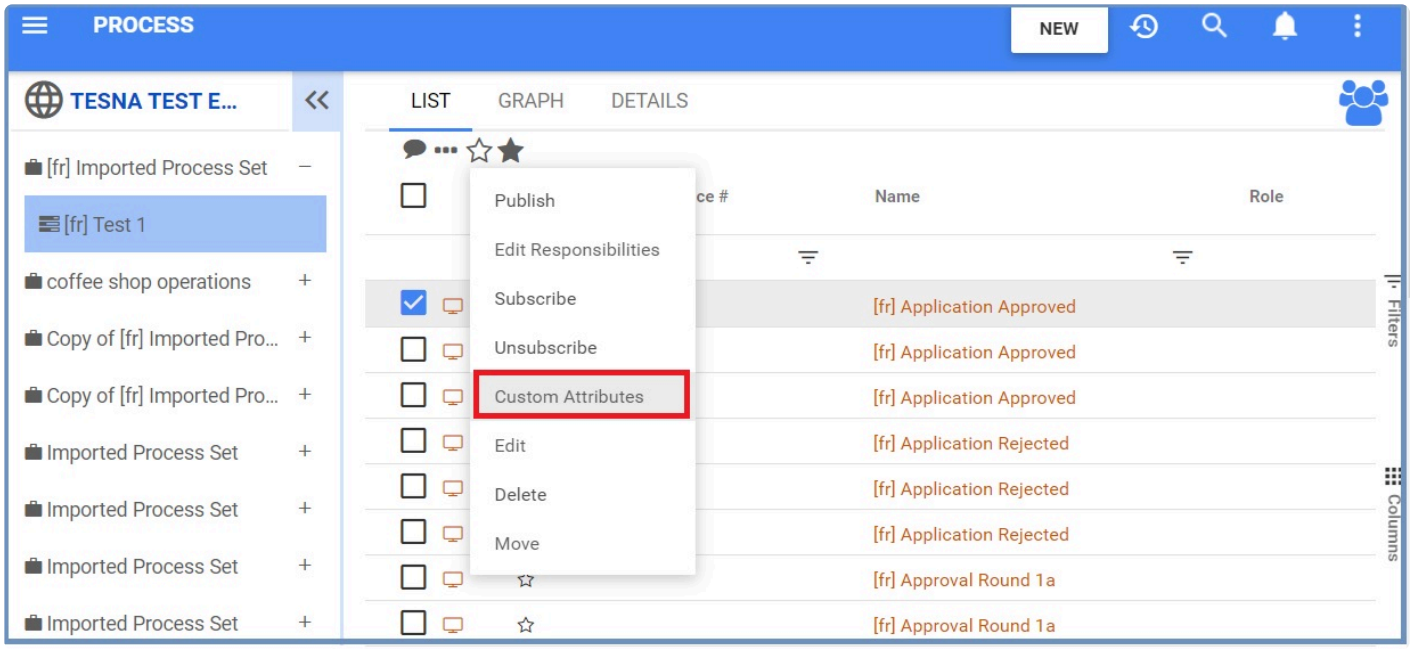
In List view, editors can select one or more objects to **Custom Attributes**.

1. Navigate to the **List** view of a module

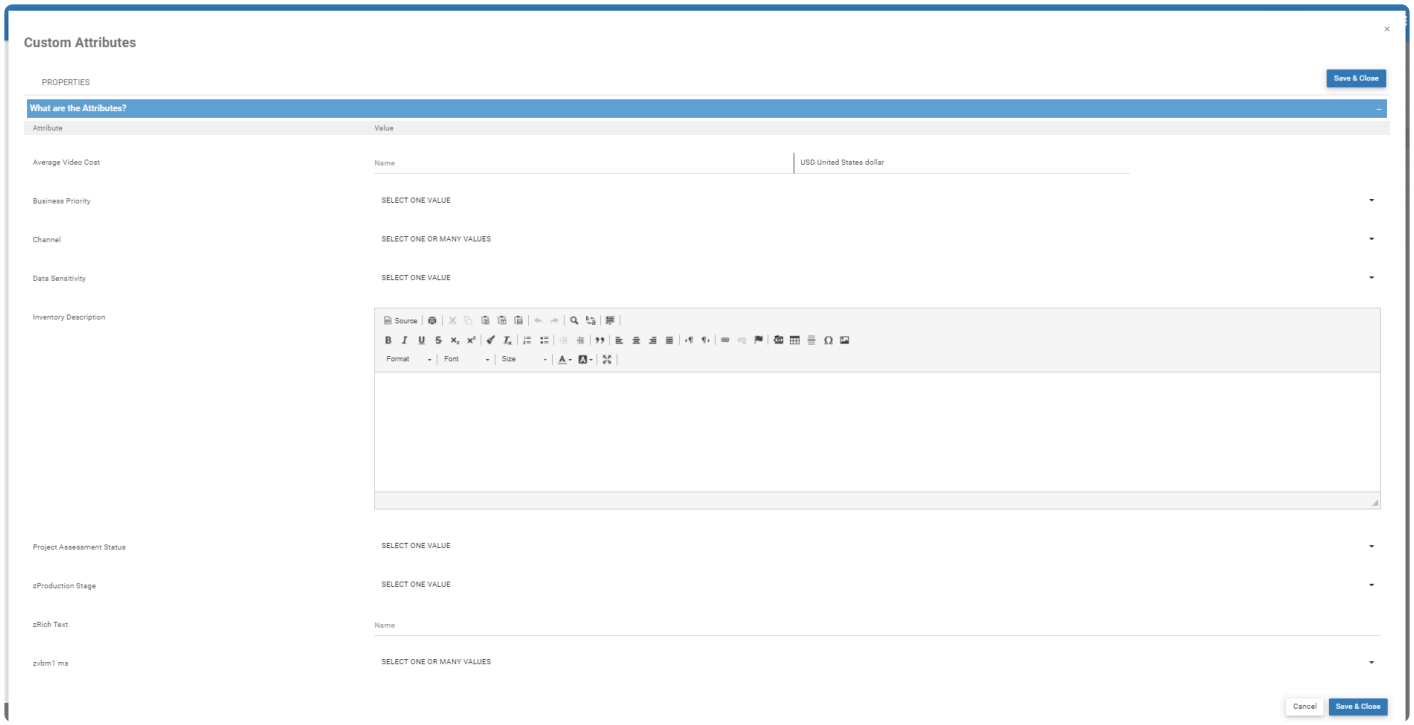
2. Choose 1 or more objects by marking the **checkbox** of the objects to be edited and select the **three-dot** icon on the page header.



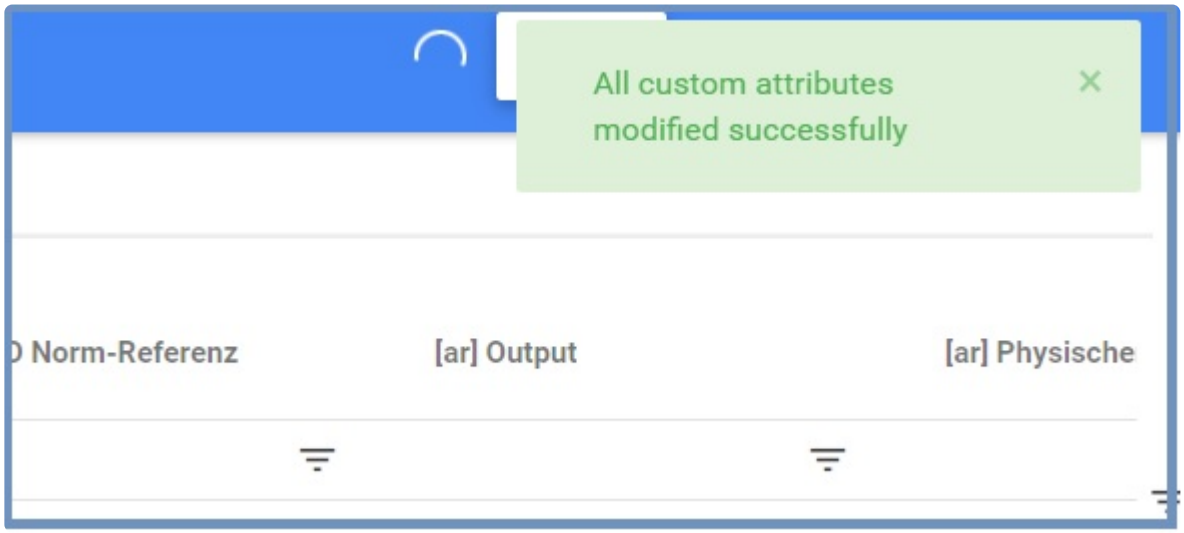
3. Select the **Custom Properties** option from the dropdown menu.



4. Then the **Custom Properties form** appears



5. Once the user has modified the attributes and save changes, then a **confirmation notification** will appear to confirm that the objects have been modified successfully

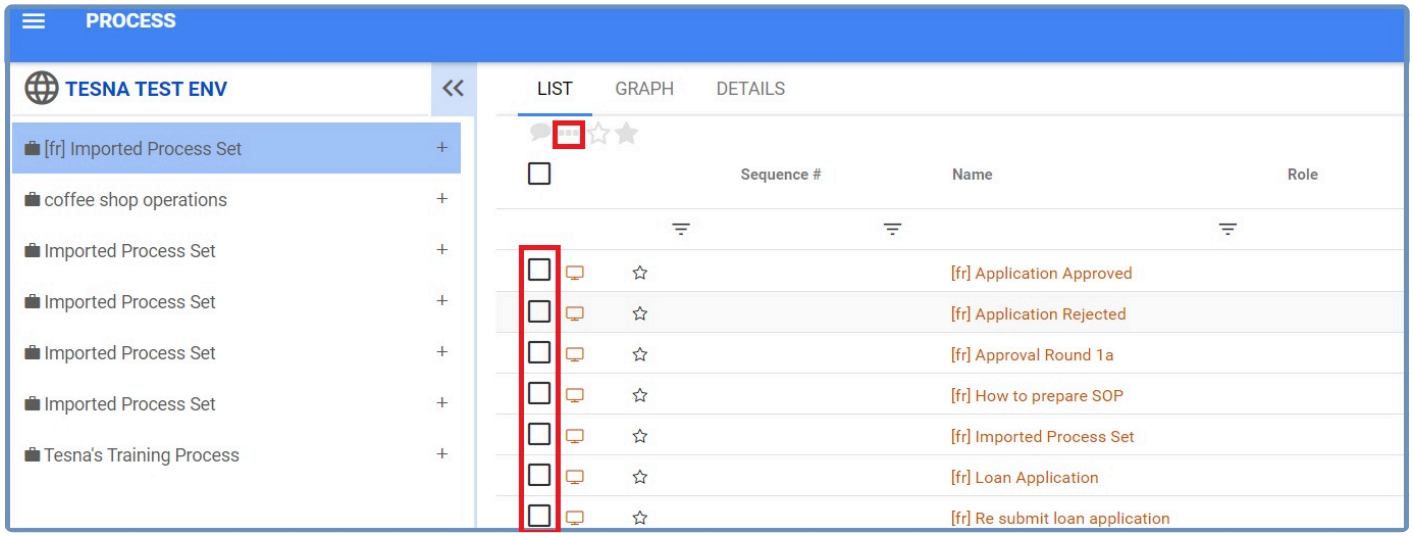


12.1.9.9 Mass Edit

Mass-Edit features allow the user to edit multiple/bulk objects in EPC, from the multi-selection menu in the list view. The mass Edit features such as Control, Rule, Document, Risk. These can be accessed through the list view of all modules.

Mass Edit	Description
Control	The EPC allows users to integrate Controls as part of business processes, clarifying and communicating the Control's objective, its importance and its procedure. The Mass control in EPC allows users to update with a new control to the selected entire objects at a time.
Rule	The Mass rule selection in EPC allows users to view and monitor business rules that control business processes to multiple business objects.
Document	The mass document selection in EPC allows users to assign documents to multiple business objects at once . For a process that already has a document, when the user assigns documents from the multi assign page, it gets added to the user's list of documents that contain the user process.
Risk	The Mass risk association in EPC allows users to assign risks to multiple processes and flow object at once and the selected objects from the list view will be updated with the new risk
Master Data	The Master Data Mass assign in EPC allows users to assign Master Data to multiple processes and flow objects at once and the selected objects from the list view will be updated with the new Master Data
Performance	The Performance Mass assign in EPC allows users to assign Performance data to multiple processes and flow objects at once and the selected objects from the list view will be updated with the new Performance measurements
Categories	
Properties	
Capability	The Capability Mass assign in EPC allows users to assign Capability data to multiple processes and flow objects at once and the selected objects from the list view will be updated with the new Capability measurements

To use these features, a user is required to simply check on "Select Box", found in the column box of the list view, to enable a list of checkboxes. Once appeared, a user is required to select at least one object to enable the icons on the page header. A list of options will be available to choose from.



Once the objects to Edit have been selected, the user can proceed to Edit them.

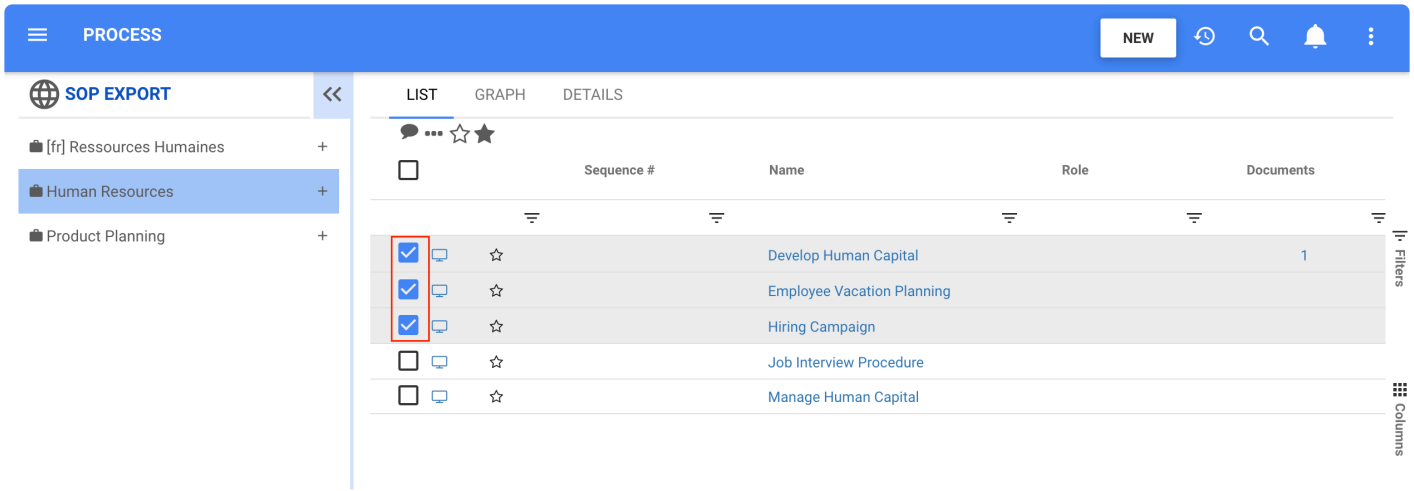
12.1.9.9.1 Control

The Mass assign-control feature will allow you to control more than one object through a single interaction.

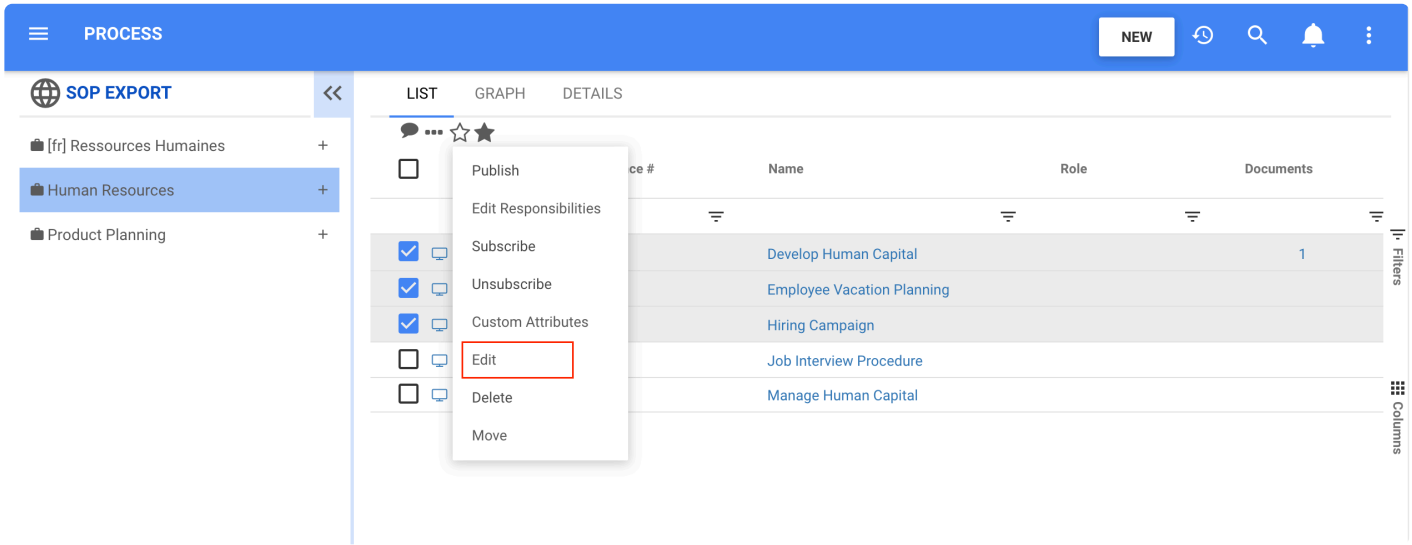
1. Navigate to the list view of a module that allows for control association.

2. Choose the Select Box and drag it to the list view.

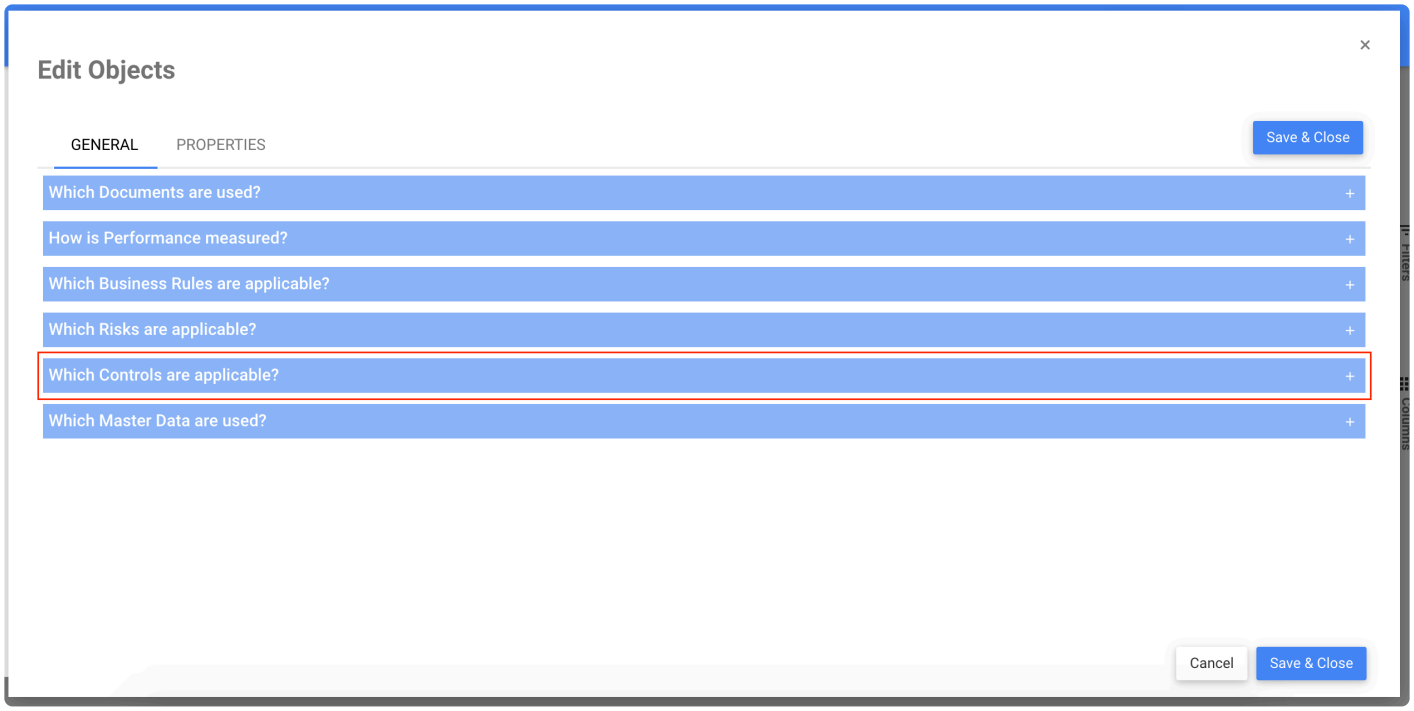
3. Choose one or many object types using the Select Box.



4.Select the **three-dot** icon on the page header and **Select Edit** from the menu.



5.You will be directed to the **Which Controls are applicable?** window.



6.Select the control and click on the **Save & Close** button.

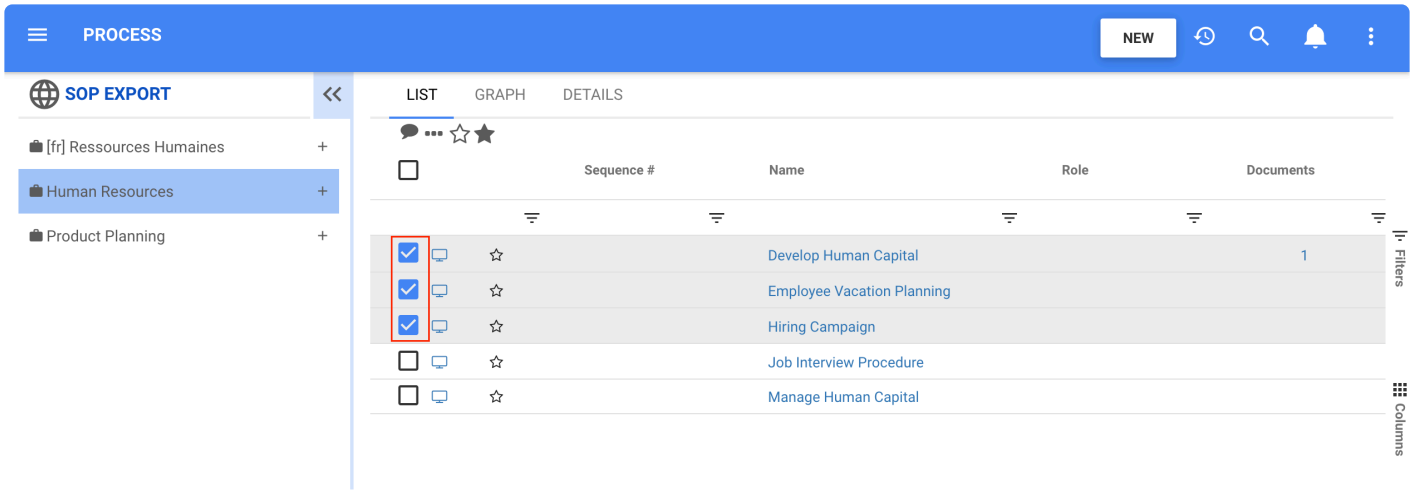
12.1.9.9.2 Rule

The Mass assign-rule selection feature will allow you to select rules of more than one object through a single interaction.

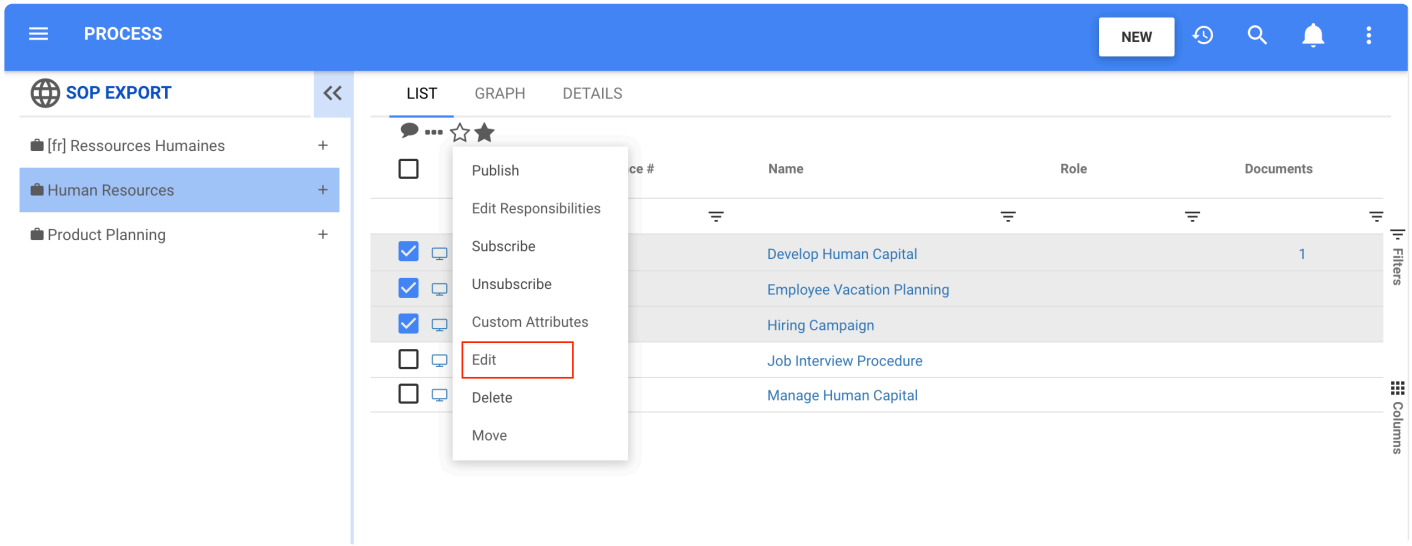
1. Navigate to the list view of a module that allows for rules association.

2. Choose the **Select Box** and drag it to the list view.

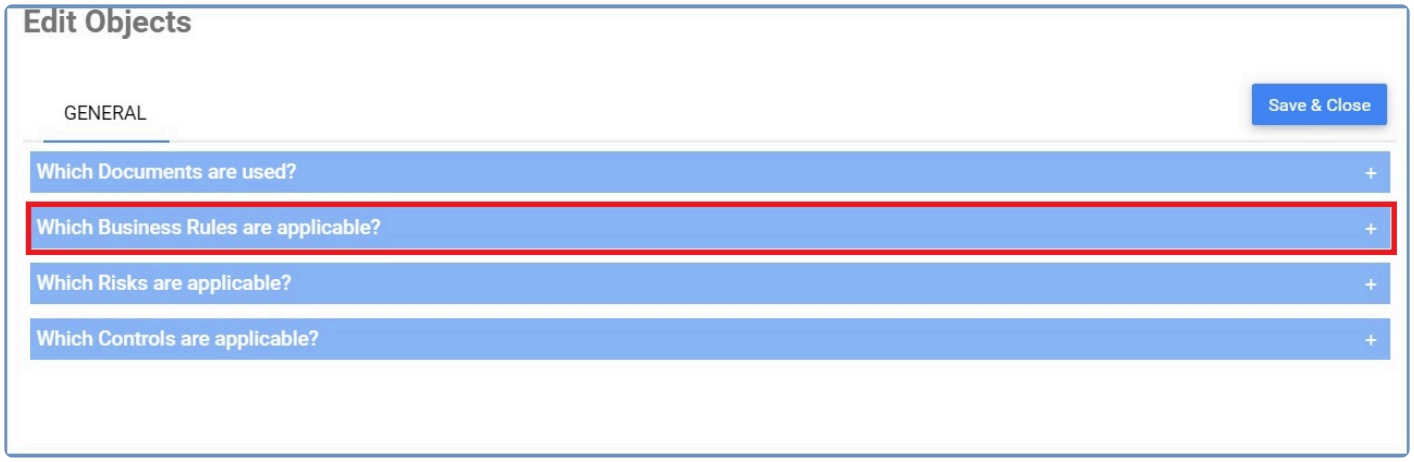
3. Choose one or many object types using the Select Box.



4.Select the **three-dot** icon on the page header and **Select Edit** from the menu.



5.You will be directed to the **Which Business Rules are applicable?** window.



6.Select the Rule and click on the **Save & Close** button.

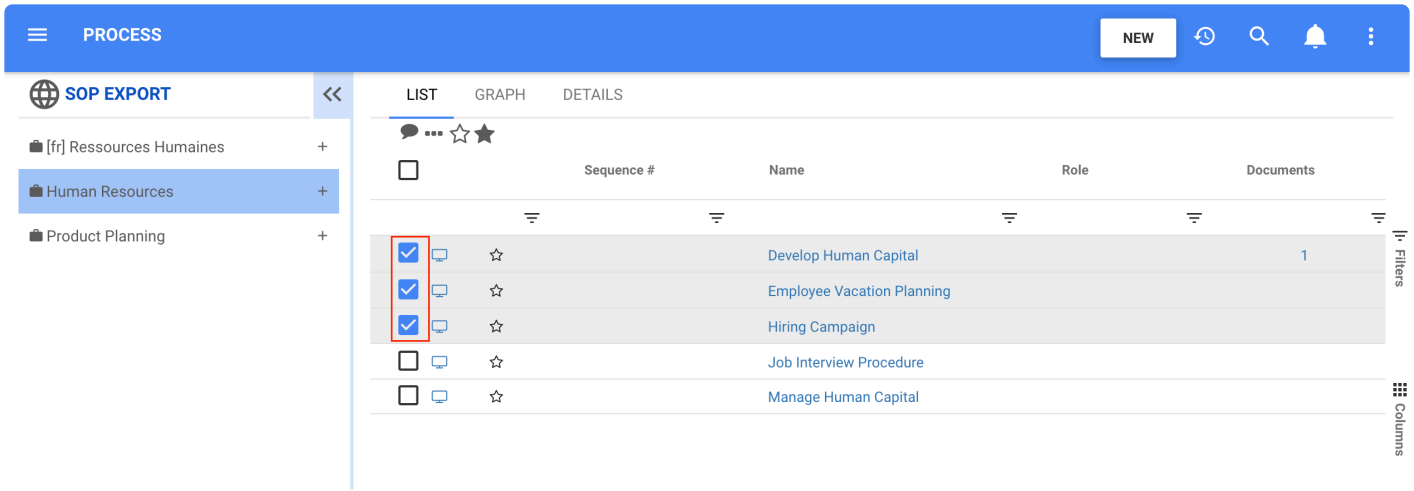
12.1.9.9.3 Document

The Mass edit-document selection feature will allow you to select the document of more than one object through a single interaction.

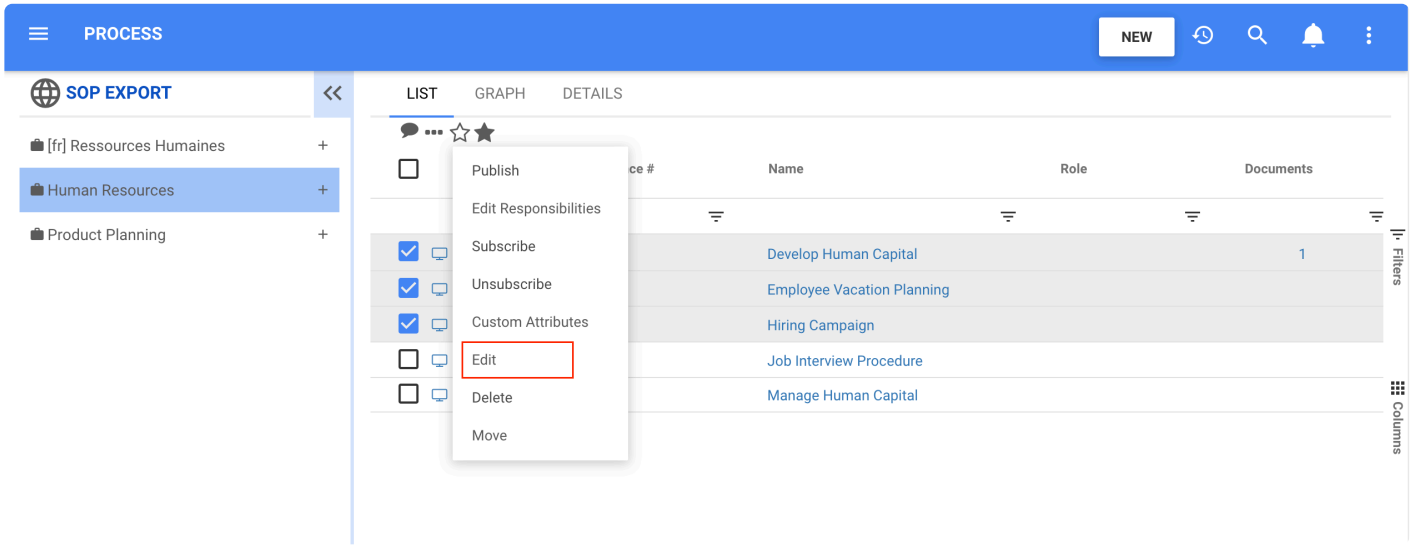
1. Navigate to the list view of a module that allows for document association.

2. Choose the Select Box and drag it to the list view.

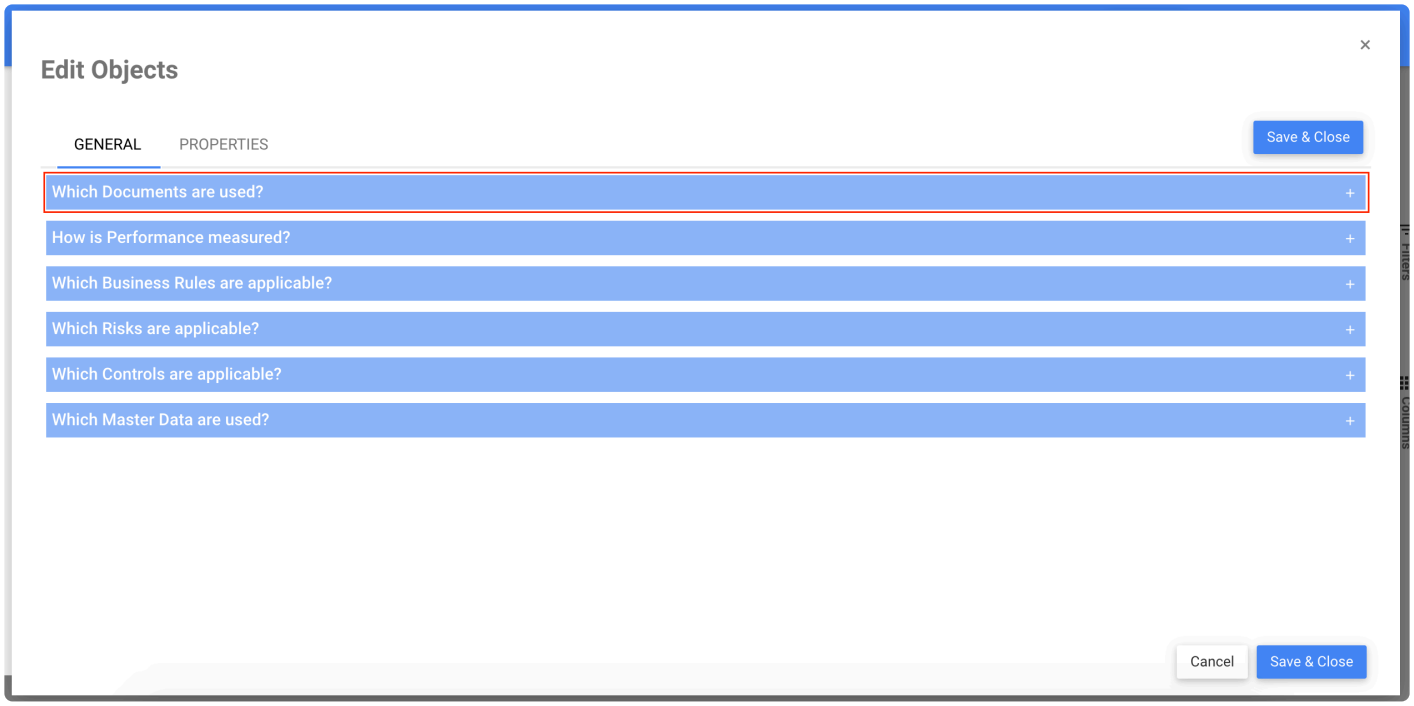
3. Choose one or many object types using the Select Box.



4.Select the **three-dot** icon on the page header and **Select Edit** from the menu.



5. You will be directed to the **Which Documents are used?** window.



6.Select the document and click on the **Save & Close** button.

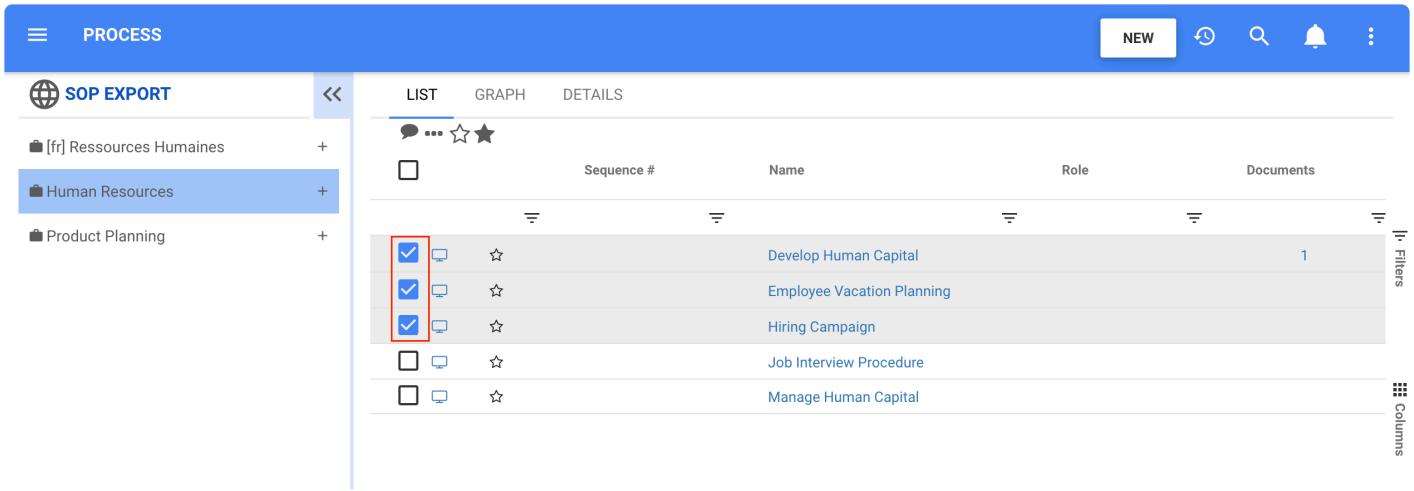
12.1.9.9.4 Risk

The Mass assign-risk selection feature will allow you to select the risk of more than one object through a single interaction.

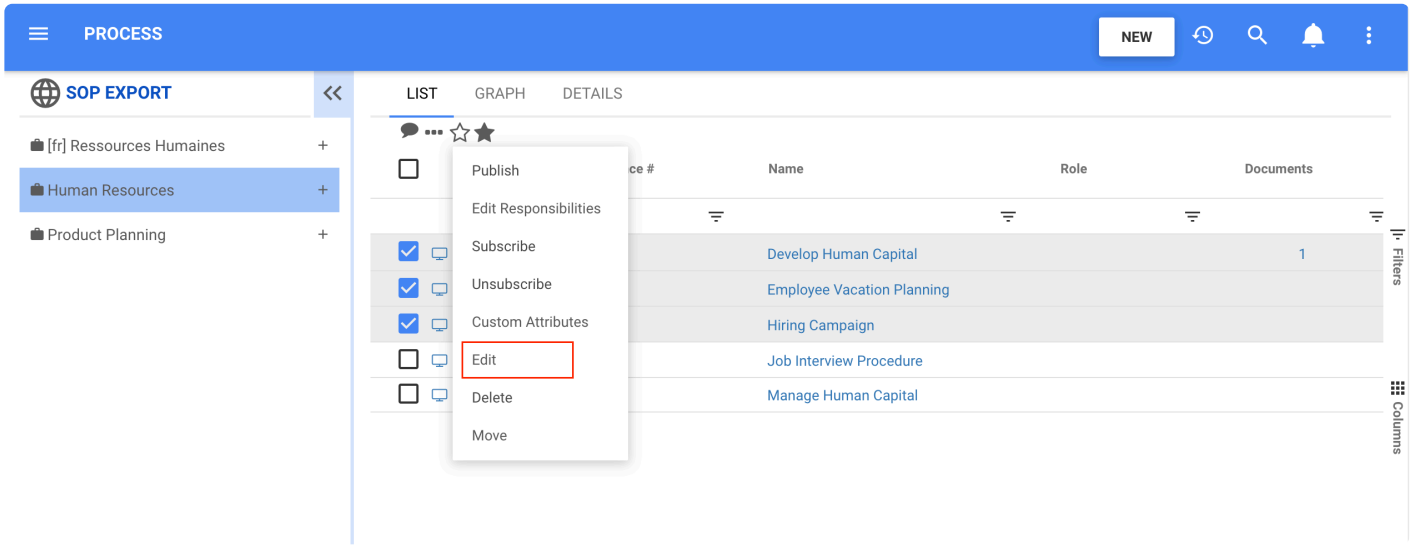
1. Navigate to the list view of a module that allows for risk association.

2. Choose the **Select Box** and drag it to the list view.

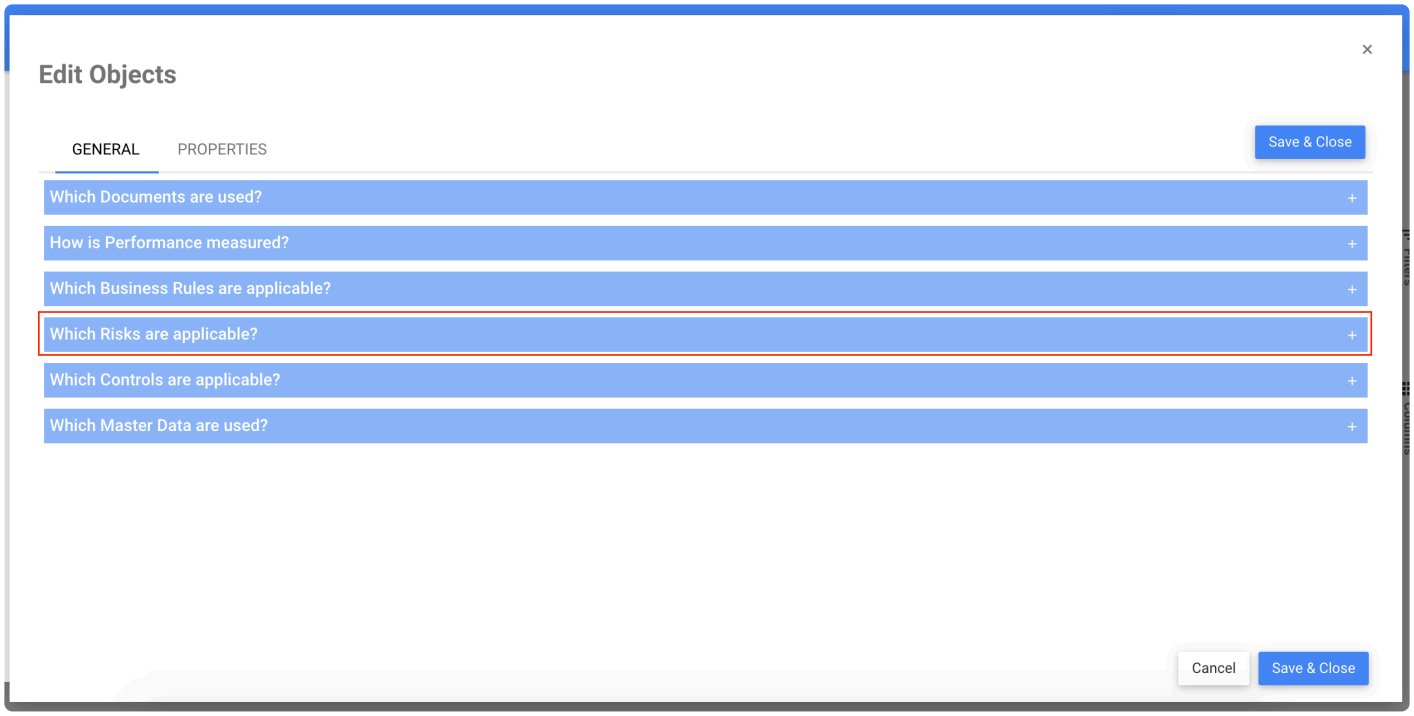
3. Choose one or many object types using the Select Box.



4.Select the **three-dot** icon on the page header and **Select Edit** from the menu.



5.You will be directed to the **Which Risk are applicable?** window.



6.Select the Risk and click on the **Save & Close** button.

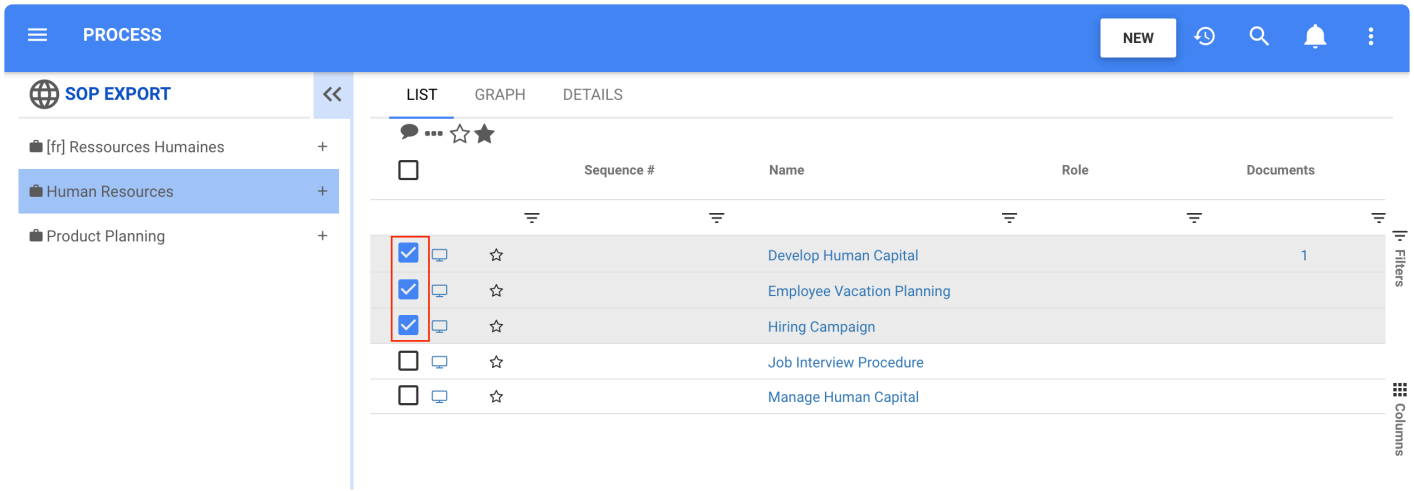
12.1.9.9.5 Master Data

The Mass assign-Master Data selection feature will allow you to select Master Data of more than one object through a single interaction.

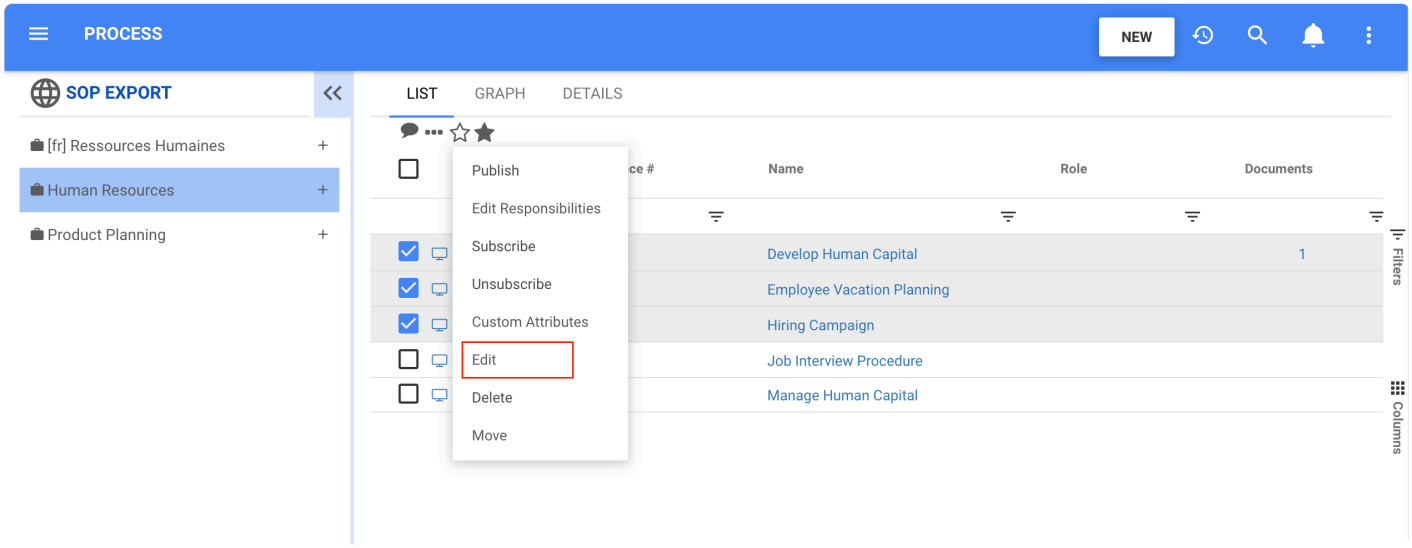
1. Navigate to the list view of a module that allows for Master Data association.

2. Choose the Select Box and drag it to the list view.

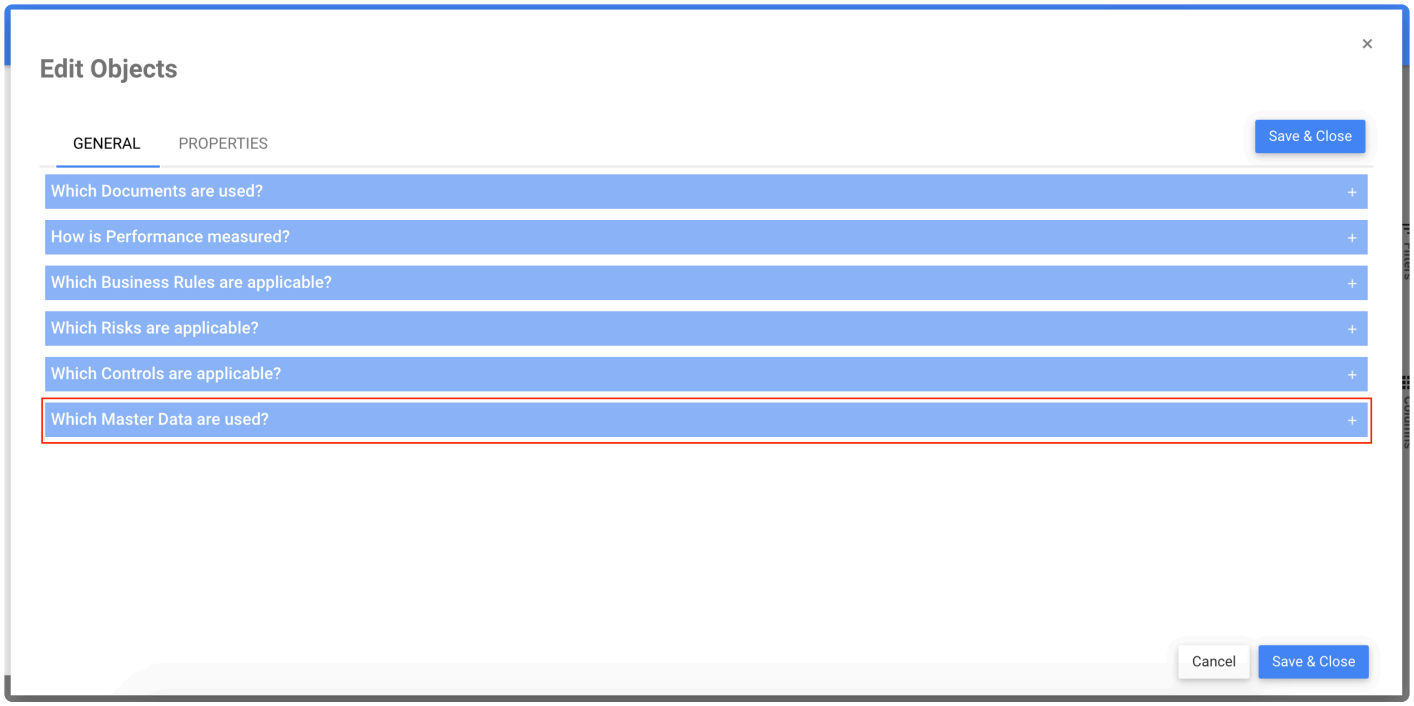
3. Choose one or many object types using the Select Box.



4.Select the **three-dot** icon on the page header and **Select Edit** from the menu.



5.You will be directed to the **Which Master Data are used?** window.



6.Select an Entity or Attribute and click on the **Save & Close** button.

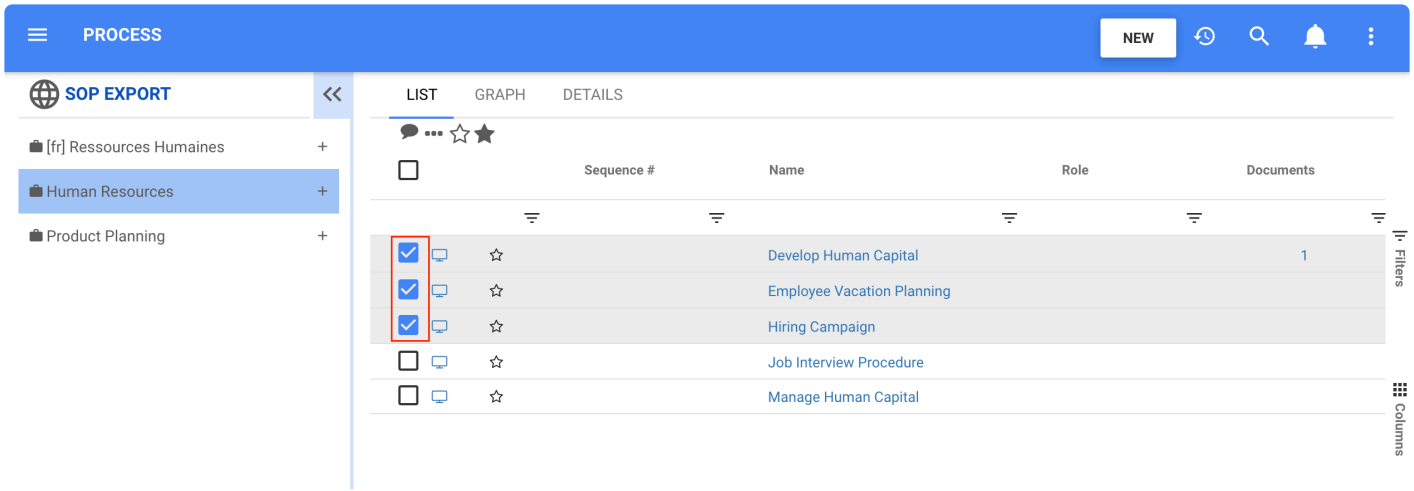
12.1.9.9.6 Performance

The Mass assign-Performance selection feature will allow you to select Performance of more than one object through a single interaction.

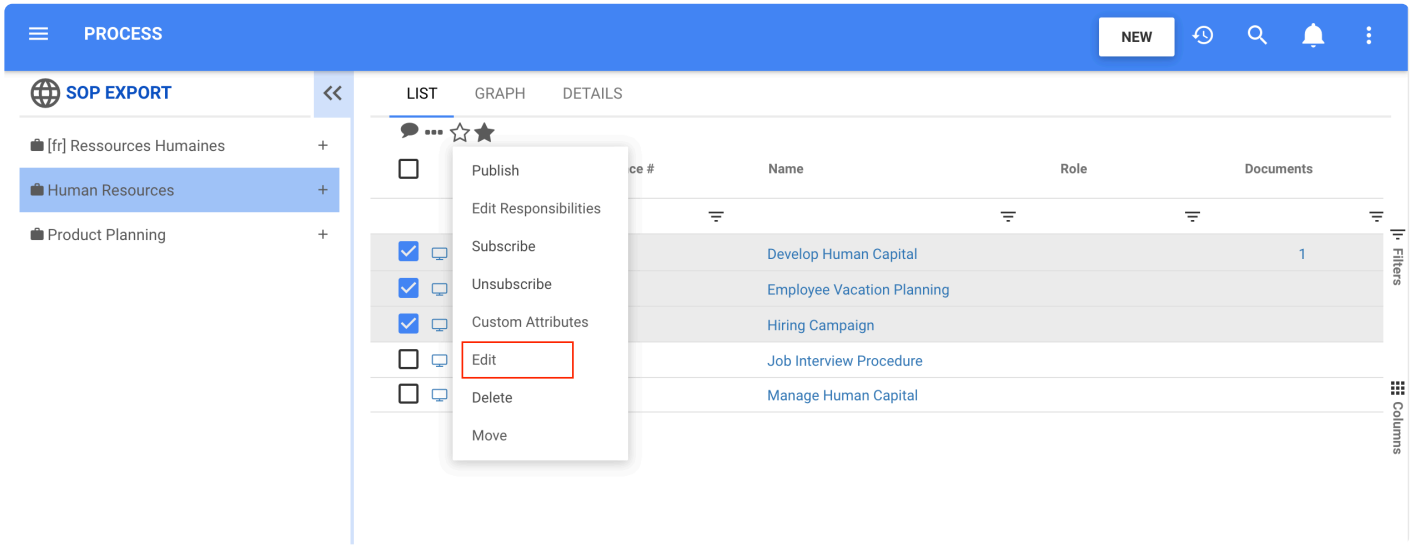
1. Navigate to the list view of a module that allows for Performance association.

2. Choose the Select Box and drag it to the list view.

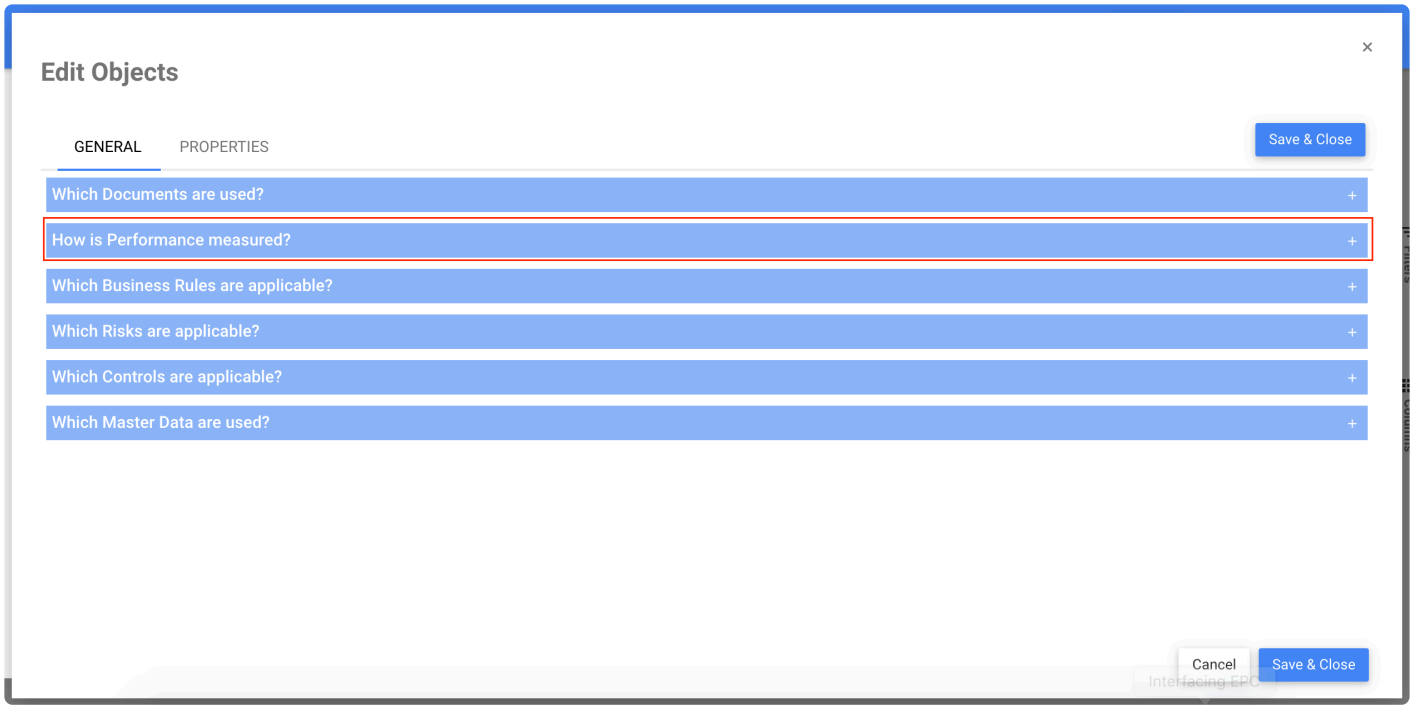
3. Choose one or many object types using the Select Box.



4.Select the **three-dot** icon on the page header and **Select Edit** from the menu.



5.You will be directed to the **How is Performance measured?** window.



6.Select an Objective, KCI, KPI or KRI and click on the **Save & Close** button.

12.1.9.9.7 Categories

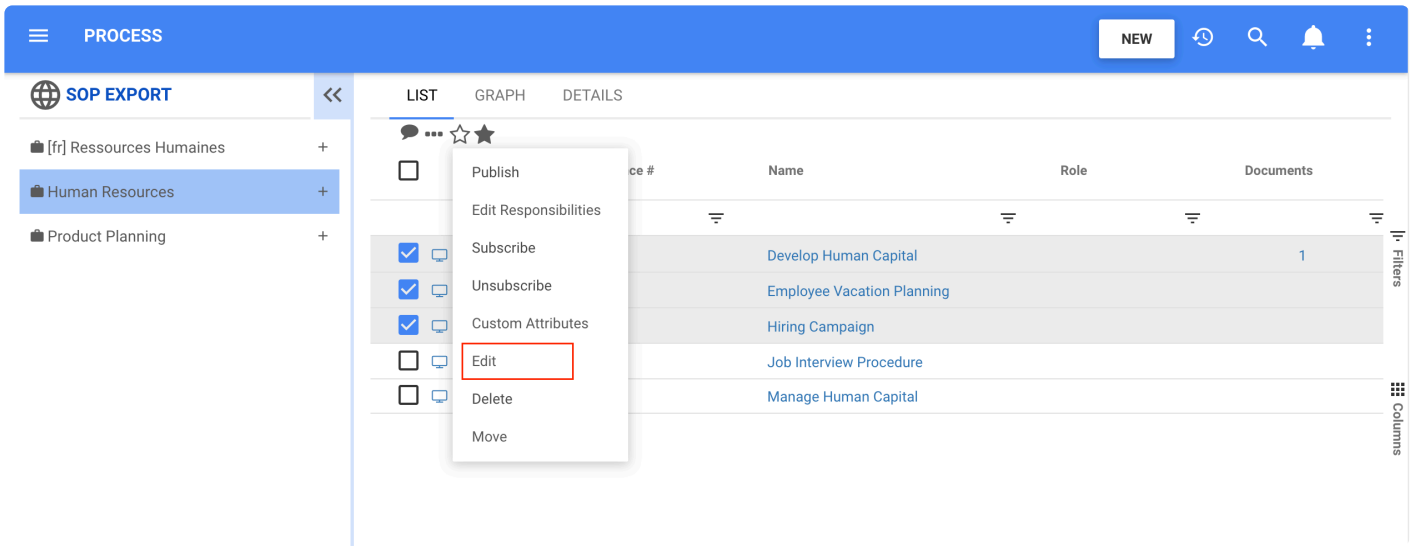
The Mass edit-Categories selection feature will allow the user to select the categories that are applicable to one or more objects through a single interaction.

1. Navigate to the list view of a module that allows for categories.

2. Choose the Select Box and drag it to the list view.

3. Choose one or many object types using the Select Box.

4.Select the **three-dot** icon on the page header and **Select Edit** from the dropdown menu.



5. Go to the **Properties** tab and click on **Which Categories are applicable?**.

6.Select a Category and click on the **Save & Close** button.

12.1.9.9.8 Properties

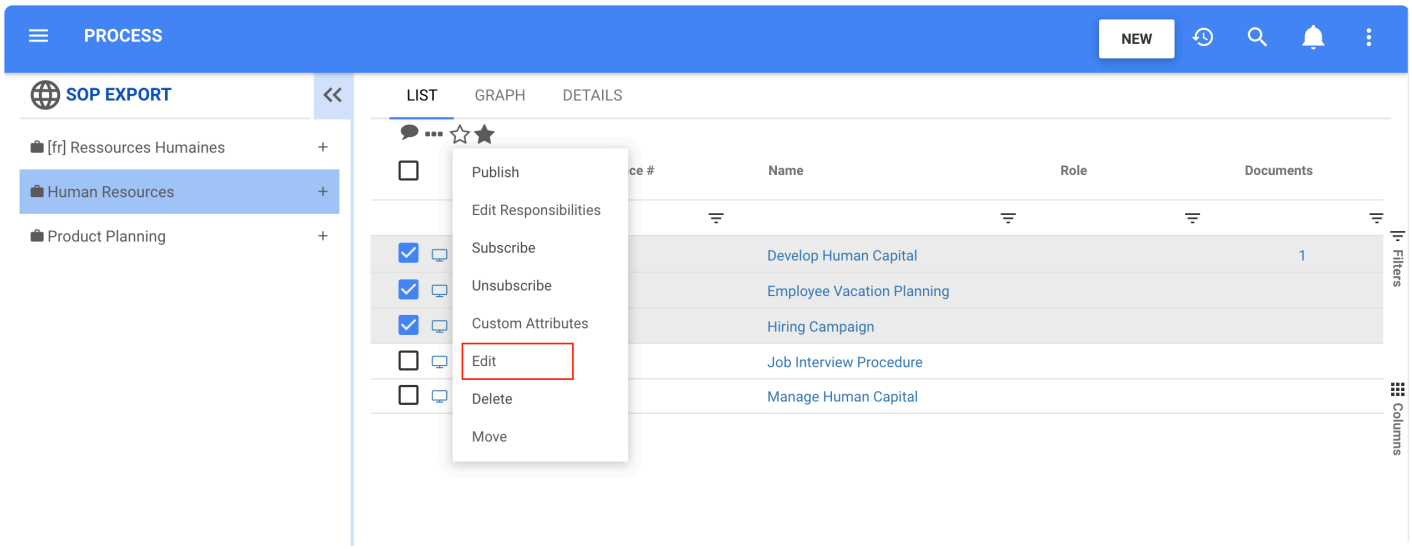
The Mass edit-Properties selection feature will allow the user to select the properties that are applicable to one or more objects through a single interaction.

1. Navigate to the list view of a module.

2. Choose the Select Box and drag it to the list view.

3. Choose one or many object types using the Select Box.

4.Select the **three-dot** icon on the page header and **Select Edit** from the dropdown menu.



5. Go to the **Properties** tab and edit available options in the properties tab.

6.Click on the **Save & Close** button.

12.1.9.9.9 Capability(General & Properties)

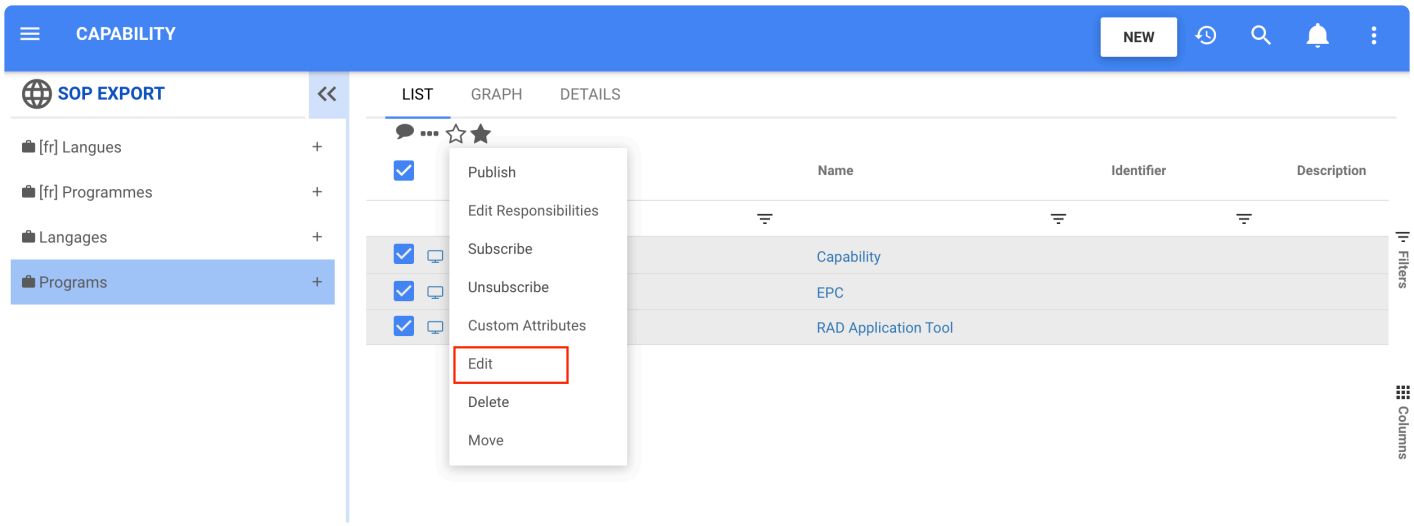
The Mass edit-Capability feature will allow the user to select the general and properties that are applicable to one or more objects through a single interaction.

1. Navigate to the list view of a Capability module.

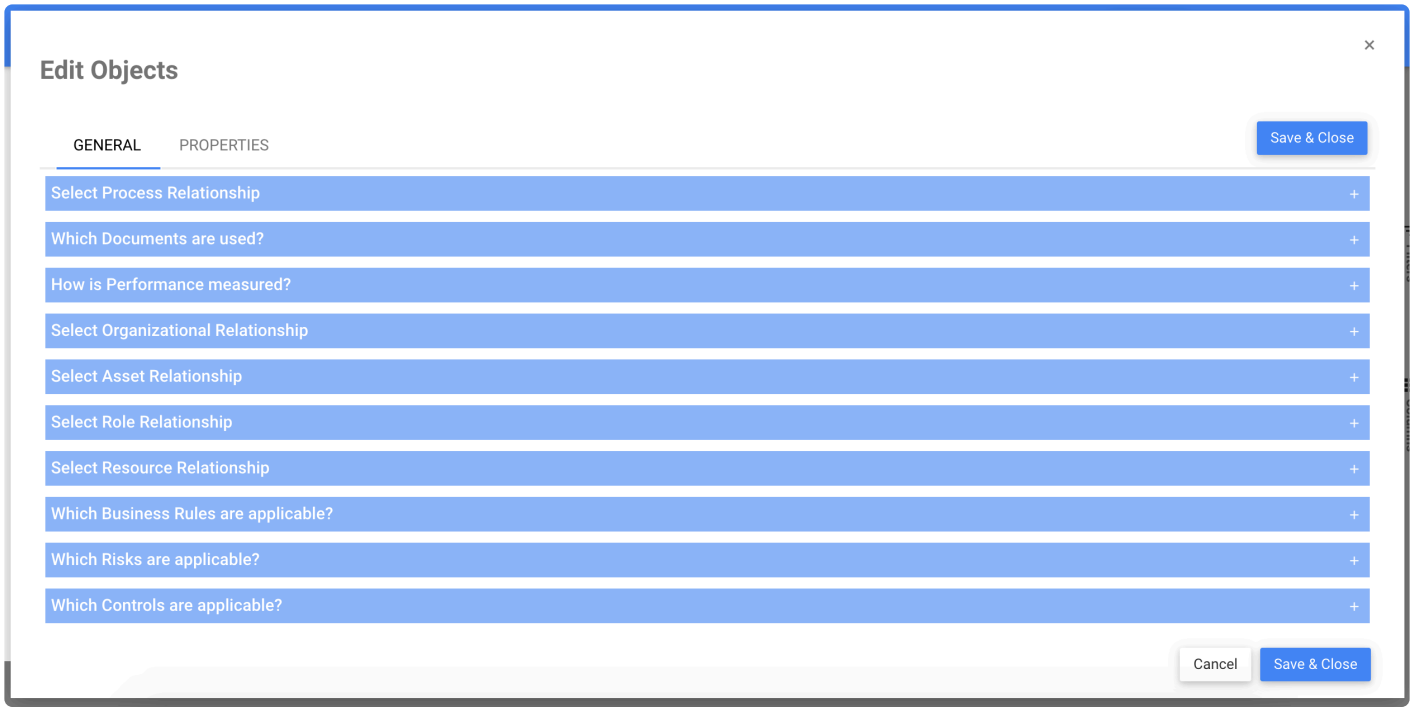
2. Choose the Select Box and drag it to the list view.

3. Choose multiple objects or all object types using the Select Box.

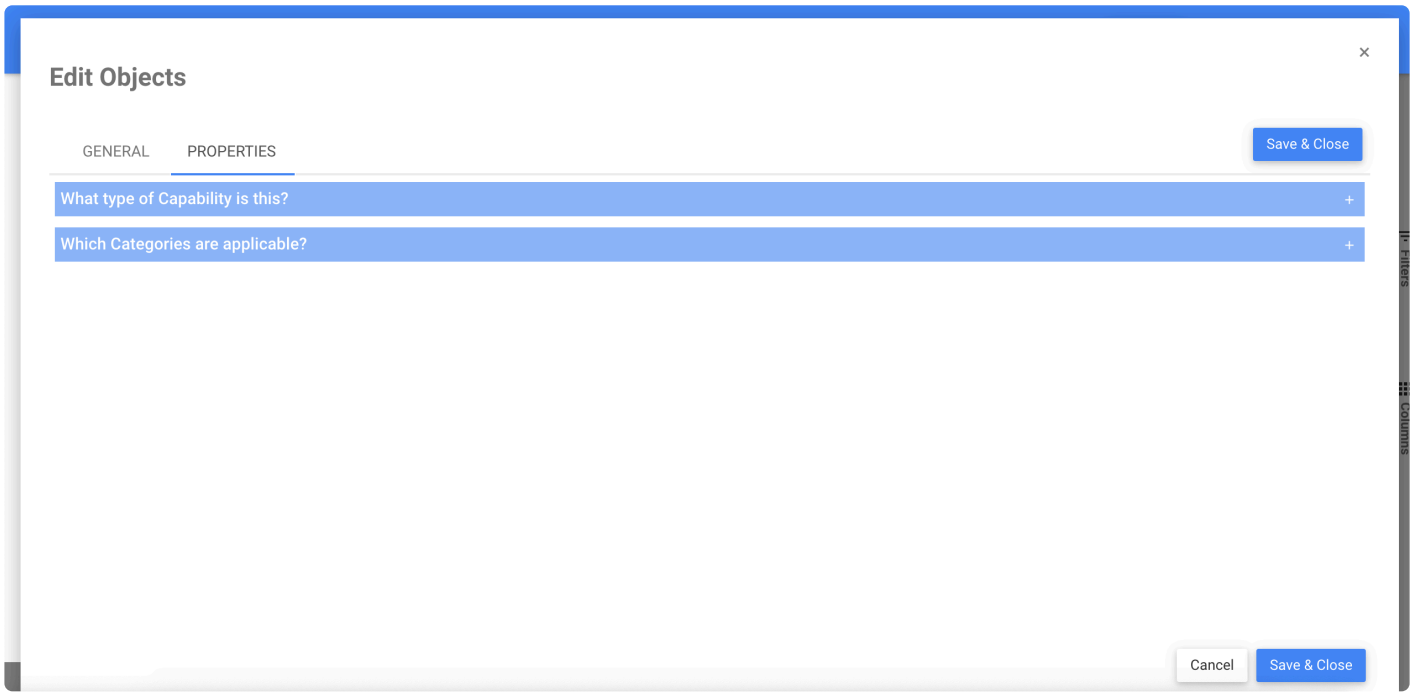
4.Select the **three-dot** icon on the page header and **Select Edit** from the dropdown menu.



5.You will be directed to the **Edit Objects** window and edit the general section.



6.Go to the properties tab and edit available options in the properties tab.



7.Click on the **Save & Close** button.

12.1.10 Rich Text Editor

The table below list all the actions a user can do using rich text editor

Icon	Name	Description
Source	Source	View or edit the document source code (for advanced users).
	Print	Print the current document.
	Cut	Cut the highlighted text to the clipboard.
	Copy	Copy the highlighted text to the clipboard.
	Paste	Paste the data copied to the clipboard.
	Paste as plain text	Paste the data copied to the clipboard (without formatting).
	Paste from Word	Paste content copied from Microsoft Word or similar applications.
	Undo	Undo the most recent action taken.
	Redo	Redo the most recent action taken.
	Find	Find a word or phrase within the document.
	Replace	Find and replace a word or phrase within the document.
	Select All	Select the entire text in the document.
B	Bold	Applies Bold formatting to highlighted text.
I	Italic	Applies Italic formatting to highlighted text.

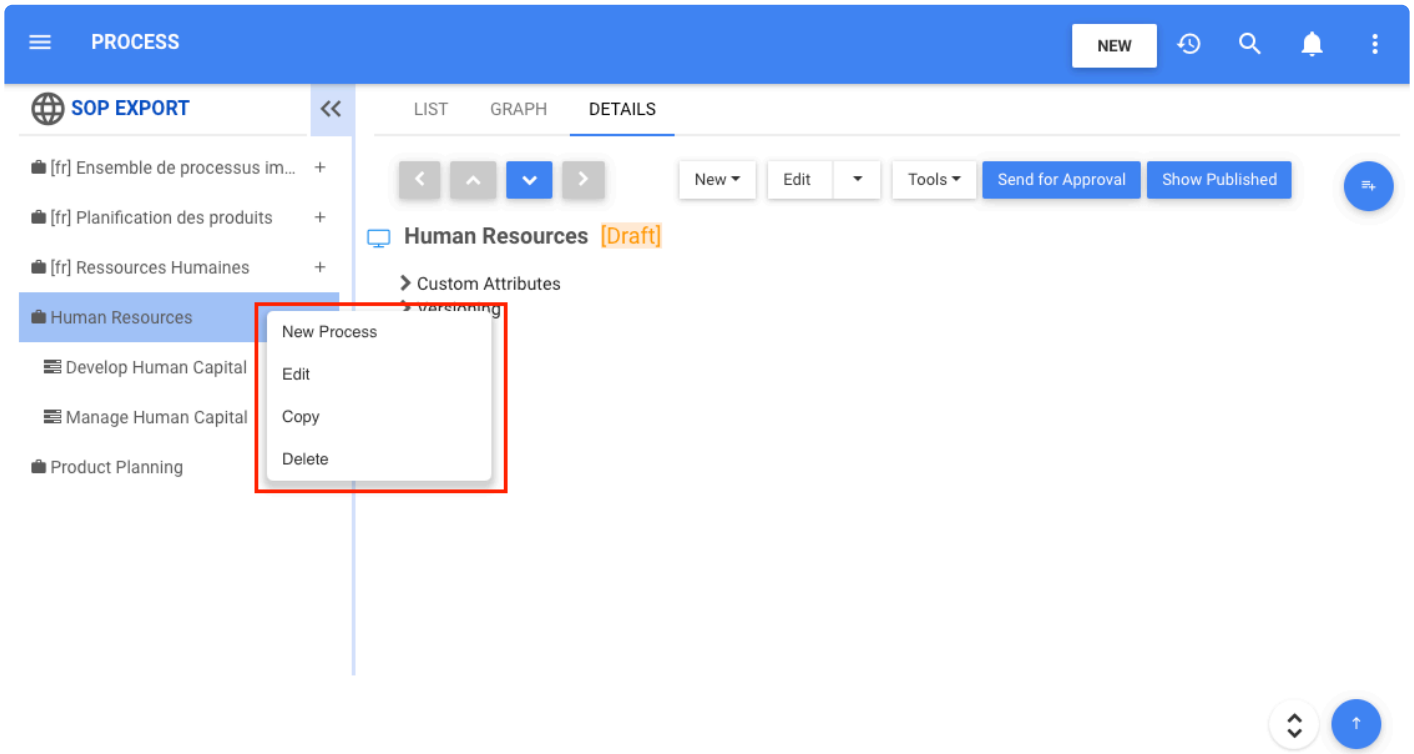
	Underline	Applies Underline formatting to highlighted text.
	Strikethrough	Applies Strike Through formatting to highlighted text.
	Subscript	Subscript the highlighted text.
	Superscript	Superscript the highlighted text.
	Copy Formatting	Copy the highlighted text's formatting.
	Remove Format	Remove the formatting from the highlighted text.
	Insert/Remove Numbered List	Create Numbered Lists.
	Insert/Remove Bulleted List	Create Bulleted Lists.
	Decrease Indent	Decrease the paragraph indent.
	Increase Indent	Increase the paragraph indent.
	Block Quote	Format a block of text to identify quotations.
	Create Div Container	Creates a container to apply formatting beyond one block of text.
	Align Left	Set text alignment left.
	Align Center	Set text alignment center.
	Align Right	Set text alignment right.
	Justify	Justify text alignment.
	Text Direction from Left to Right	Displays text left to right.

	Text Direction from Right to Left	Displays text right to left.
	Embed Media from External Sites	View or edit an URL (shorted URLs are also supported) from supported sites.
	Table	Creates a table with the defined number of columns and rows.
	Insert Horizontal Line	Inserts a divider line (horizontal rule).
	Insert Special Character	Inserts symbols & special characters (accented characters, trademark, currency symbol, etc.).
	Image	Inserts images into the document.
Normal	Paragraph Format	Applies paragraph formatting to a block of text.
Font	Font Name	Applies a specific font to a block of text.
Size	Font size	Applies a specific size to a block of text.
	Text Color	Changes the color of the text.
	Background Color	Changes the background color of the text.
	Maximize	Maximizes the editor size inside the browser.

12.1.11 Right Click Actions

Modelers have the option to create objects, edit, copy, move, delete, edit the security by just **right clicking** on an object, a folder or a set in the tree of a module. This substantially reduces the quantity of time needed for a modeler to make changes within the tree of a module.

Right clicking on a set

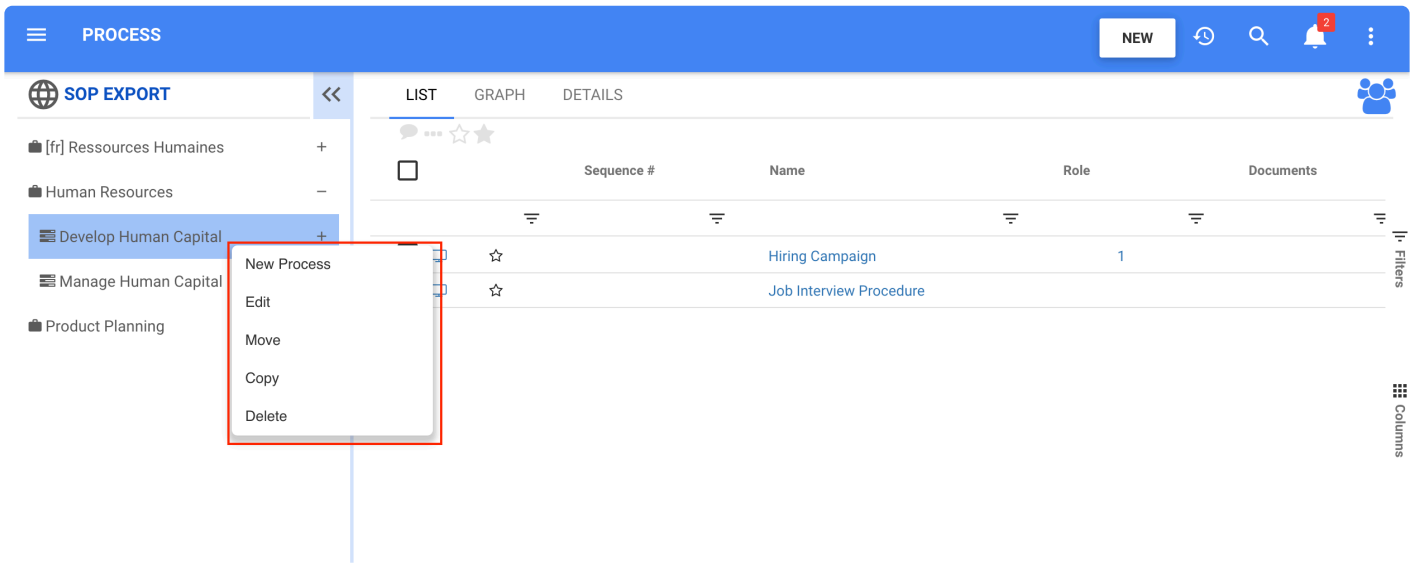


What objects Modelers can create when right-clicking on a set:

- Process
- Document
- Document Folder
- Objective
- KPI
- KRI
- KCI
- Org Unit
- Role
- Asset
- Import Users
- Risk Folder
- Risk
- Control Folder

- Control
- Rule Folder
- Rule
- Master Data Folder
- Entity
- Attribute
- Capability
- Glossary Folder
- Term

Right clicking on an object or folder



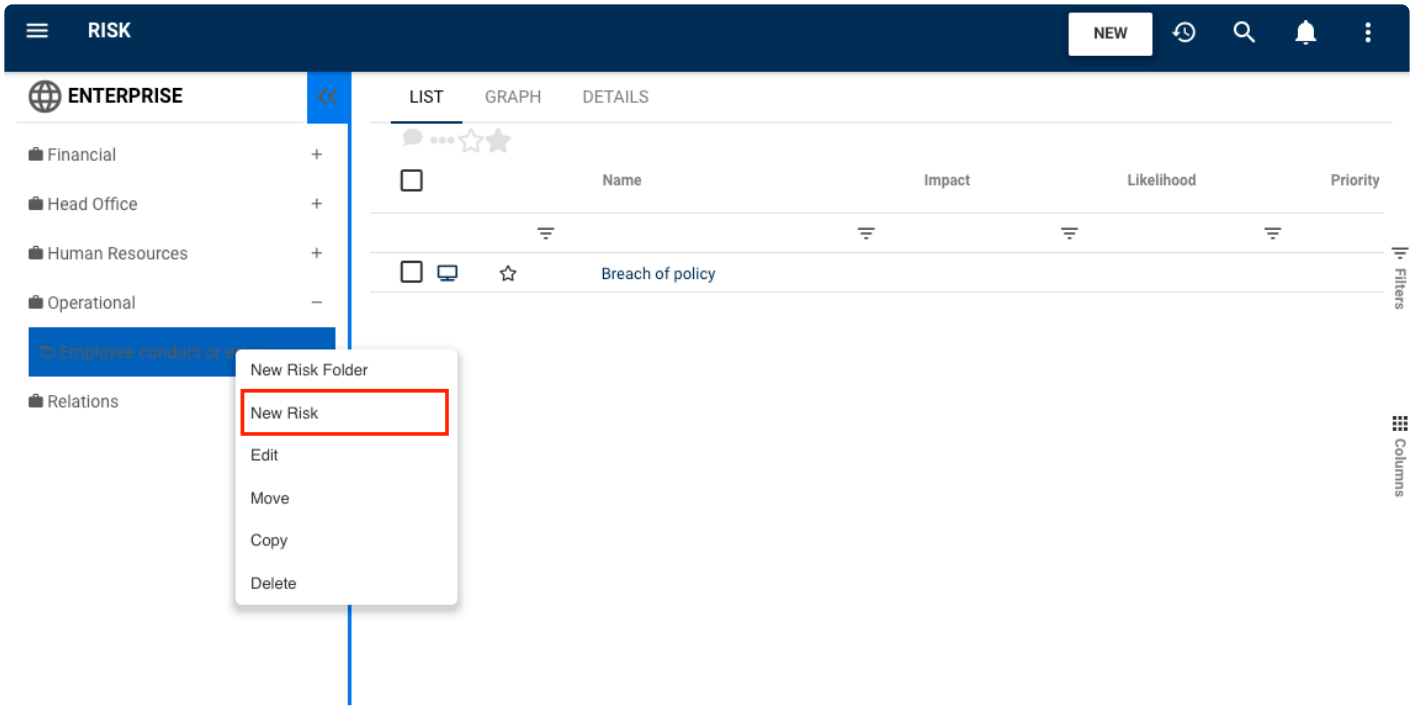
For more information on how to use the right click features, click below:

- Right Click Actions – Create Object
- Right Click Actions – Move Objects
- Right-Click Actions – Copy Objects
- Right Click Actions – Delete Objects
- Right Click Actions – Edit Objects

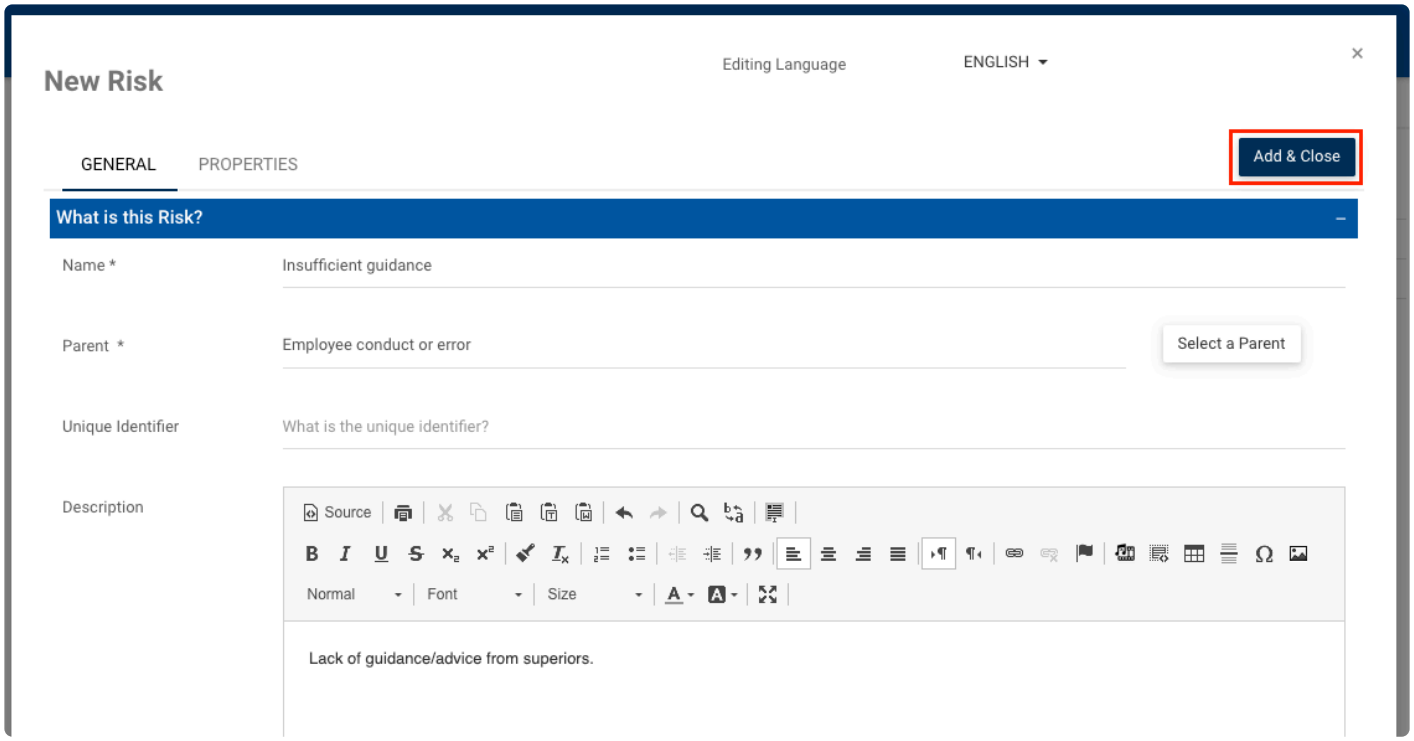
12.1.11.1 Right Click Actions – Create Objects

Modelers have the option to create object just by **right clicking** on an object, a folder or a set in the tree of any EPC module. This makes the process of creating an object faster.

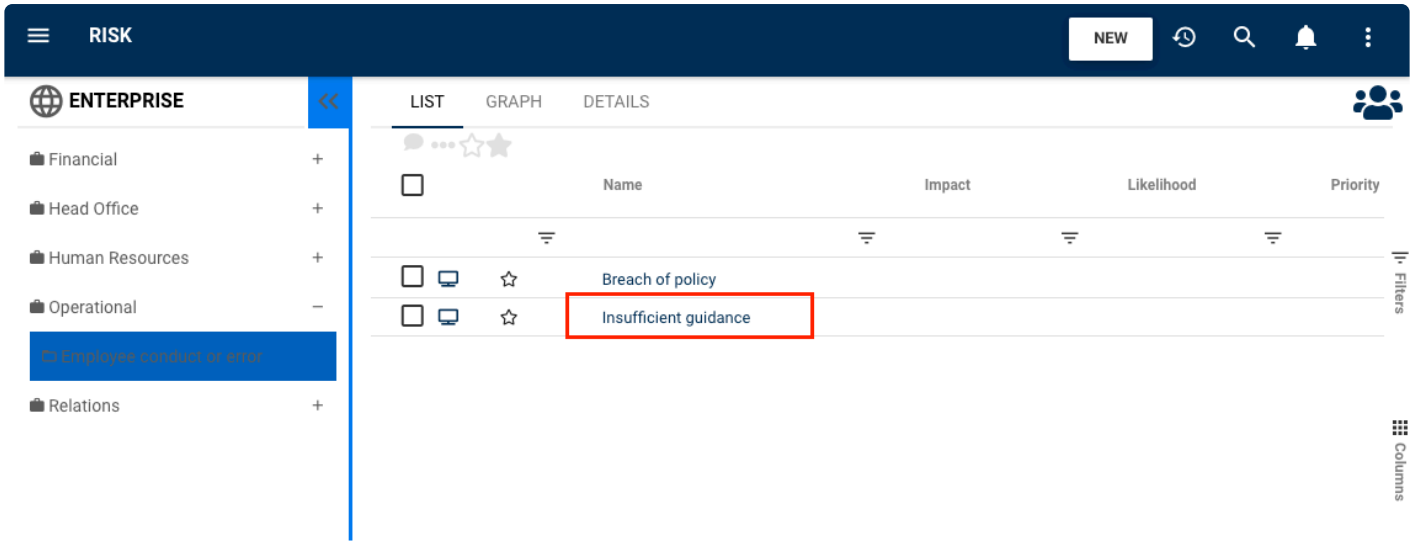
To access this feature, navigate to the desired module and click on a set, folder or object. Here, you can create a new risk or a new risk folder.



Click on New Risk, input the information wanted, and click Add & Close.



Users can see their new object in the list page.

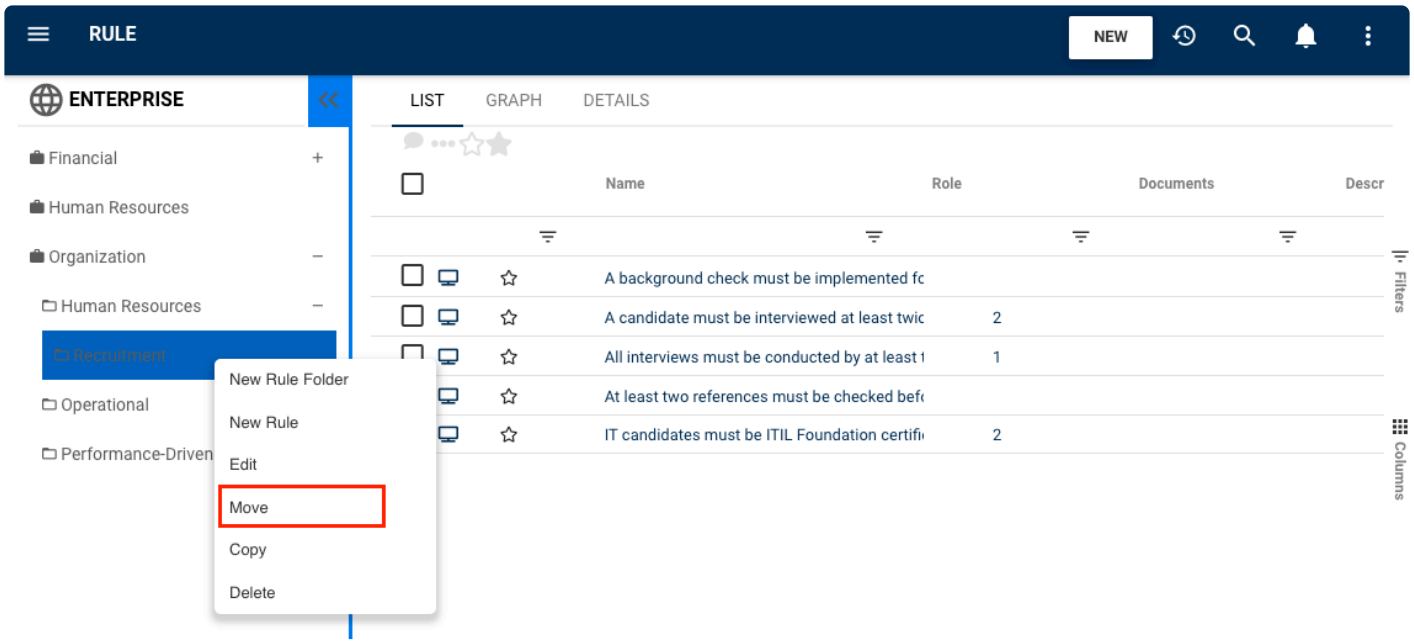


12.1.11.2 Right Click Actions – Move Objects

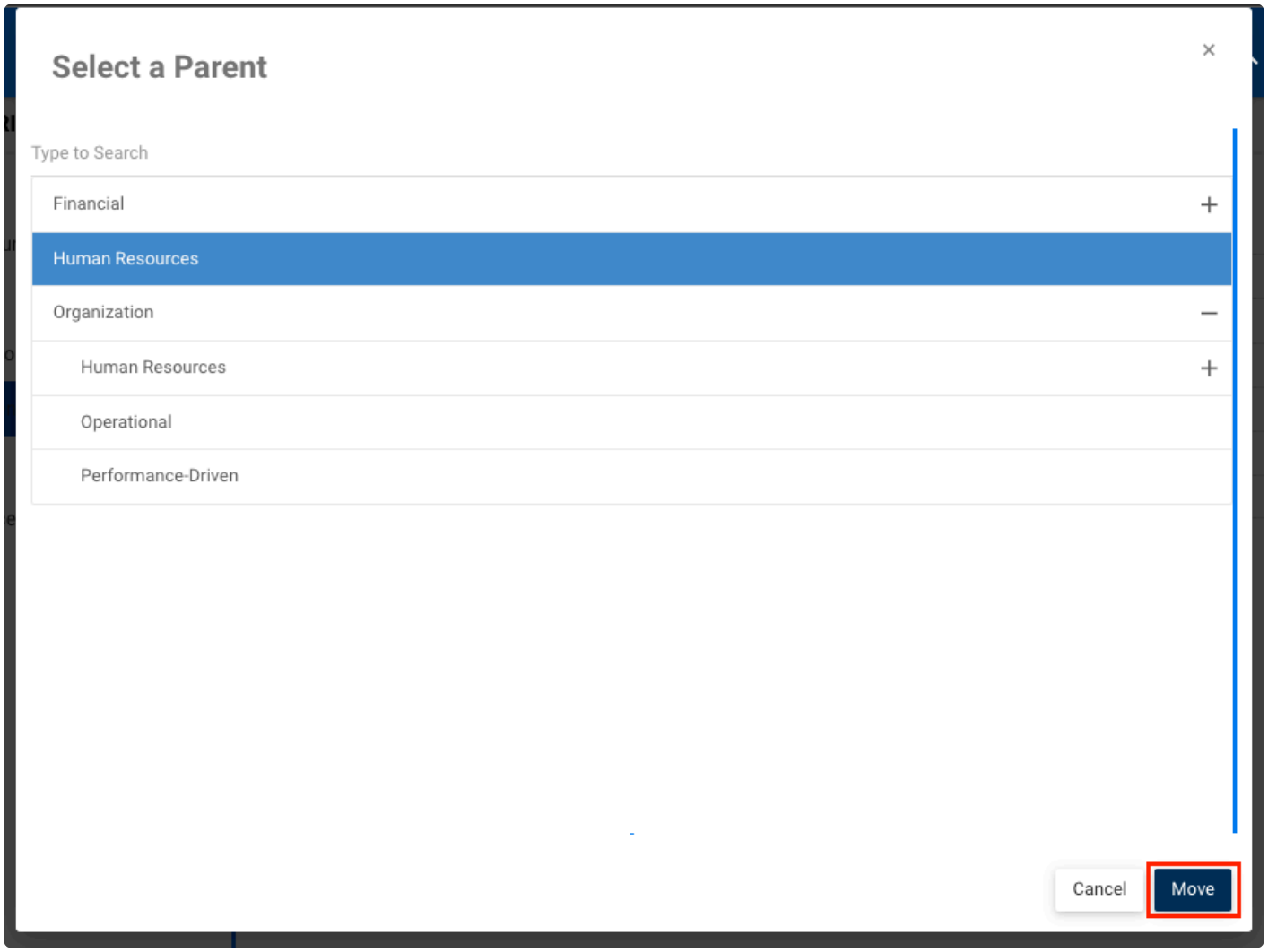
Web Modelers can move objects inside of sets by **right-clicking** on the tree of any module. This makes the process of moving an object faster.

> Processes can be moved from: Process to a Process and Process to Process Set

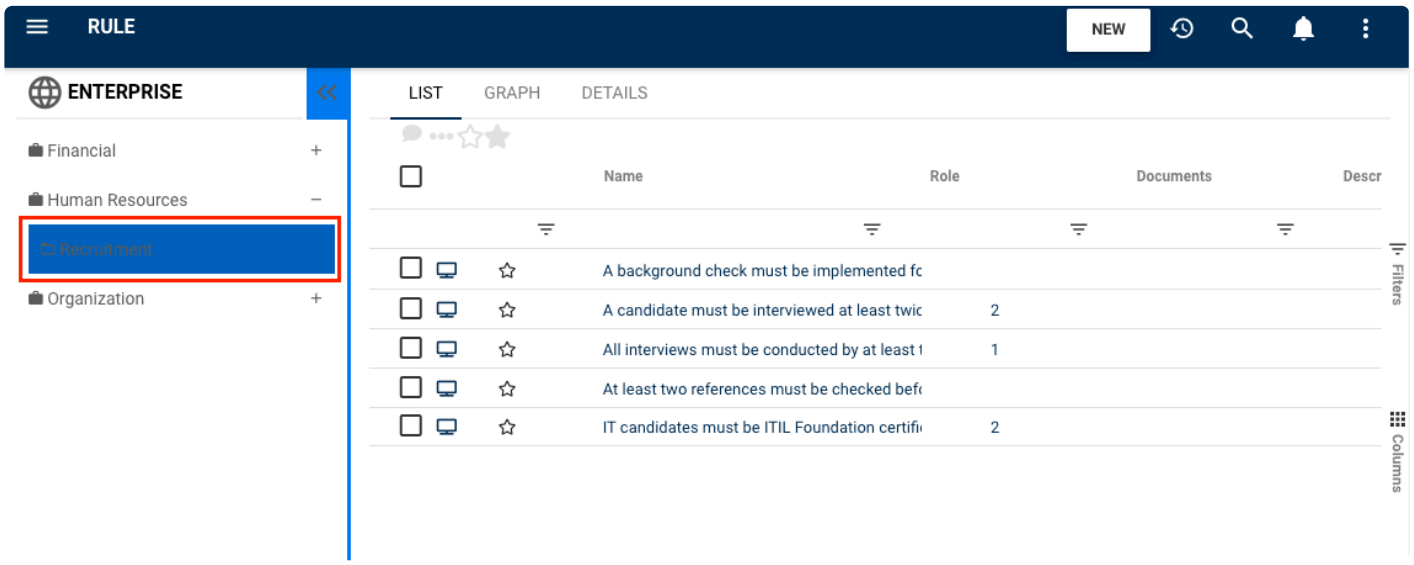
To access this feature, navigate to the desired module, right-click on a folder or process and select “Move”.



Select where you’d like the folder to go and click move.



The folder will be moved.

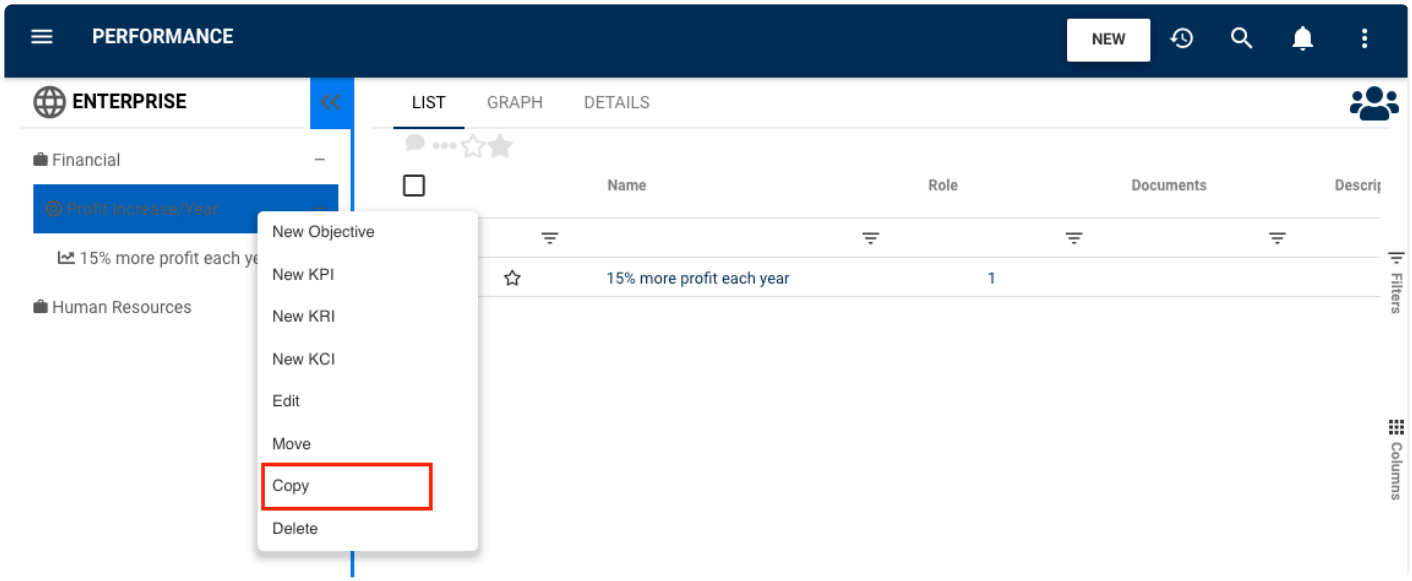


You can find further detail on Moving Objects in EPC here.

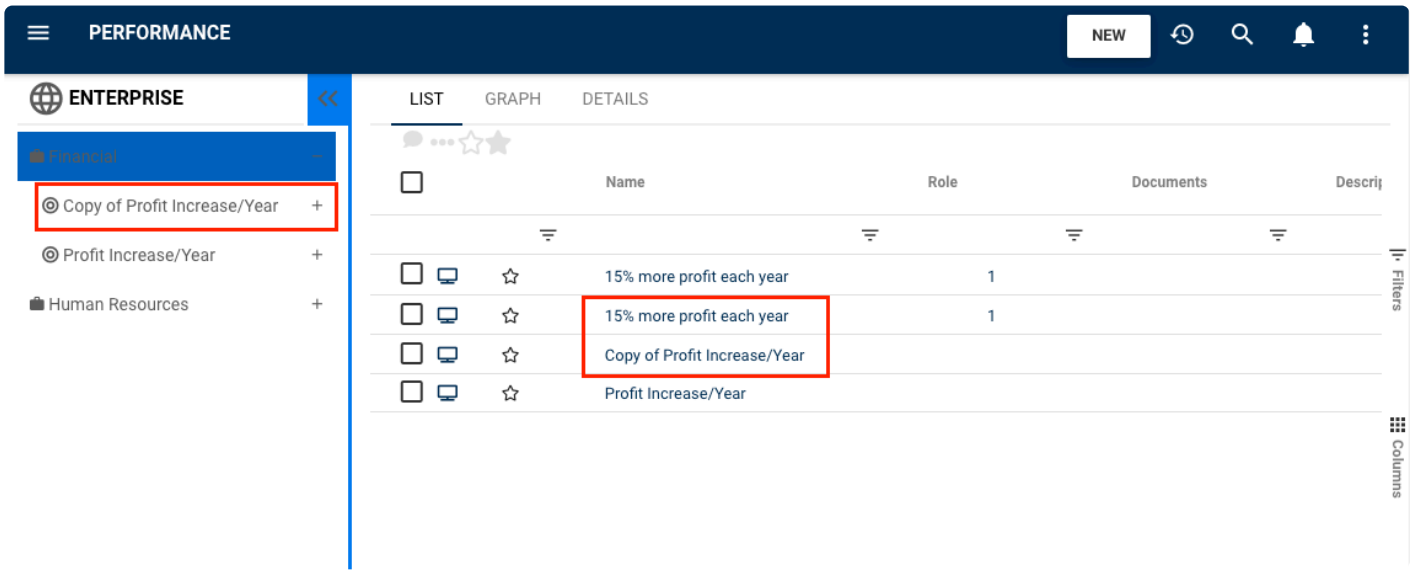
12.1.11.3 Right Click Actions – Copy Objects

Web Modelers can copy sets, folders or objects by **right-clicking** on the tree of any module. This makes the process of copying an object faster.

Navigate to the preferred module, right-click on the object to copy and select Copy.



Select where the object will be copied in the pop-up window. The object will be copied and everything in it (if it is a folder or process set).



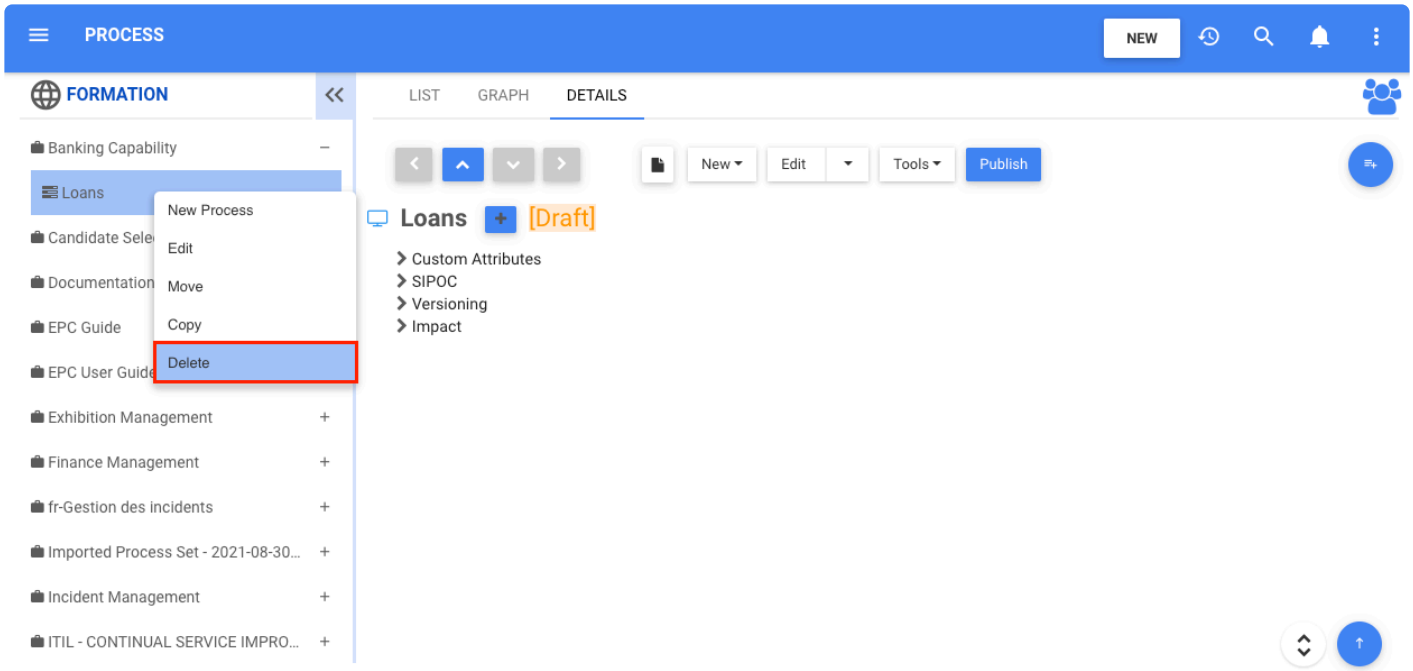
12.1.11.4 Right Click Actions – Delete Objects

Web Modelers can Delete objects by right-clicking on the Module on the tree.

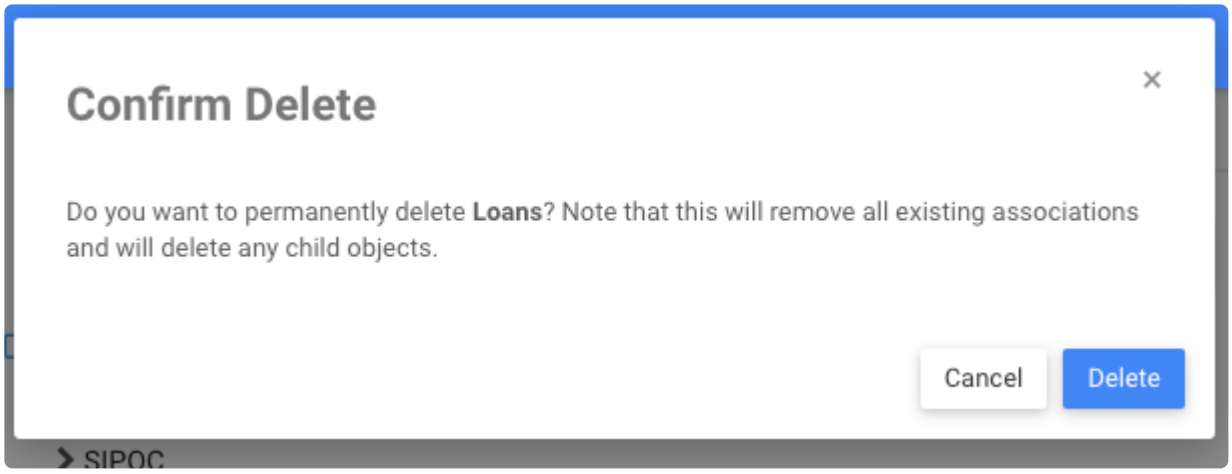
For example, Web Modeler can Delete Processes within the Process Modules quickly by right-clicking on the process.

1. Click on the Navigation Menu Button on the top left of your screen and navigate to the Process Module.

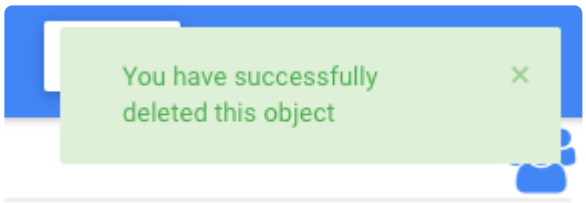
2. Right-click on a Process Set or Process and select Delete from the dropdown menu.



3. A request for confirmation of deletion will be requested, to prevent accidental deletion. Click on the **Delete** button.



3. A notification saying that the object was successfully deleted will appear.



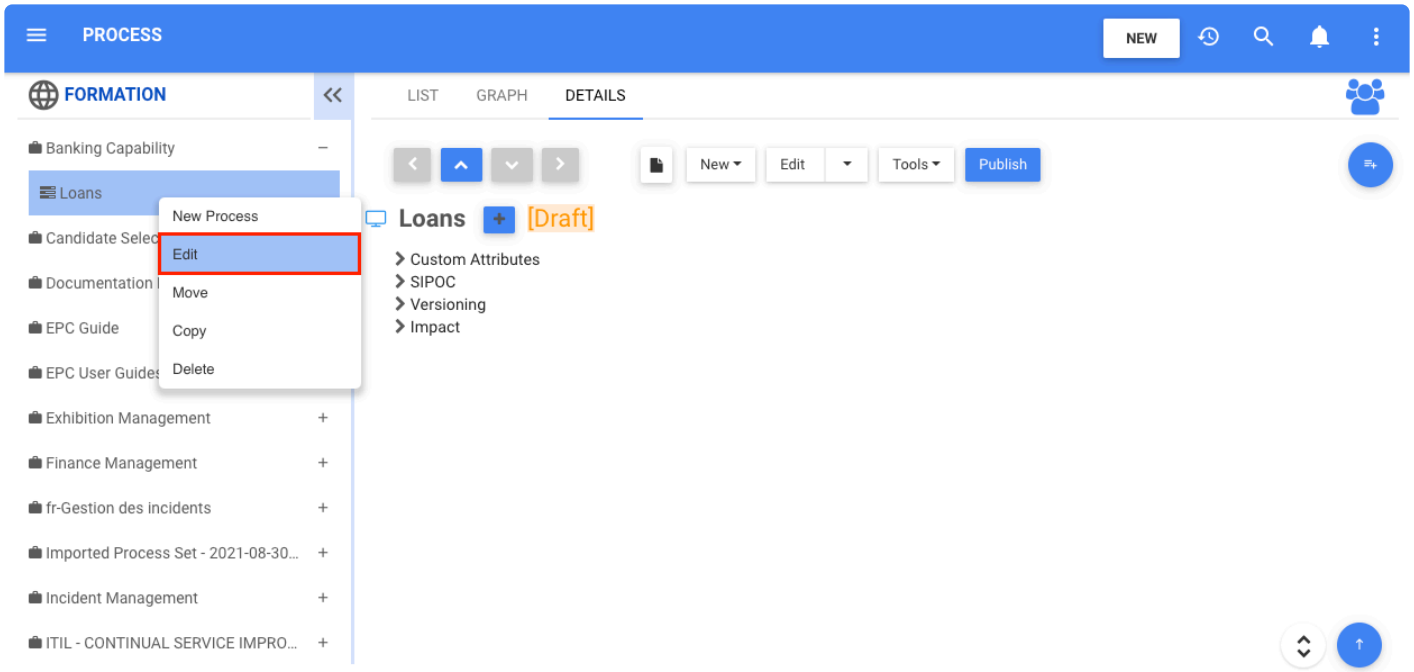
12.1.11.5 Right Click Actions – Edit Objects

Web Modelers can Edit objects by right-clicking on the Module on the tree.

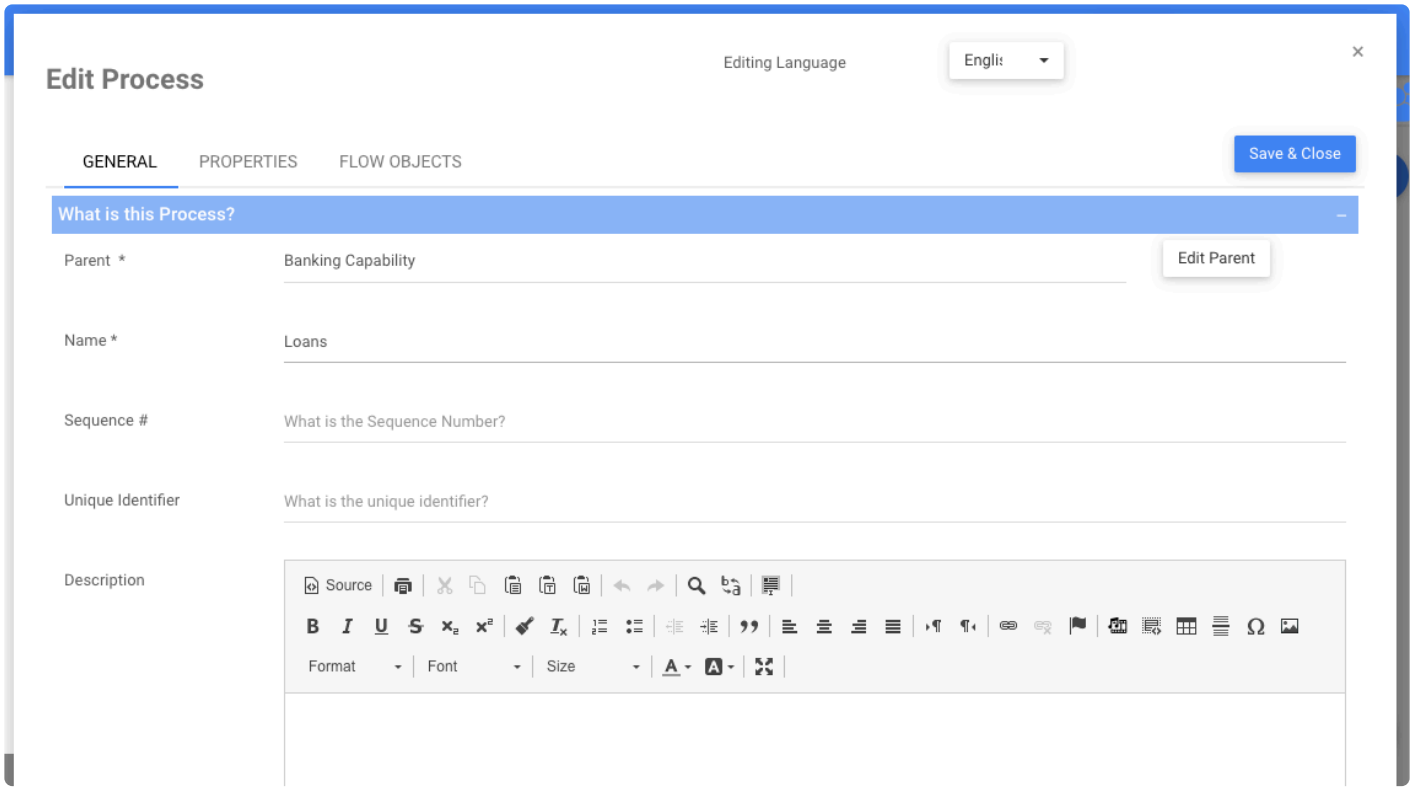
For example, Web Modeler can Edit Processes within the Process Modules quickly by right-clicking on the process.

1. Click on the Navigation Menu Button on the top left of your screen and navigate to the Process Module.

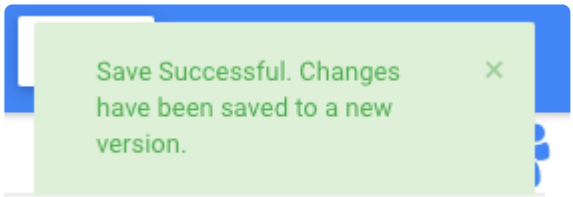
2. Right-click on a Process Set or Process and select Edit from the dropdown menu.



3. The Edit form will appear. When the desired changes have been made, click on the **Save & Close** button.



4. A notification of success will appear.



12.2 Process Edit

The Process Module of EPC allows users to create a process map that visually describes the flow of work within the activities of your company. Processes represent individual business processes or procedures and are comprised of sub-processes and activities.

Users given the permission to be Web Modelers, can map the processes directly on the WebApp.

EPC uses a process hierarchy to store business processes, where processes are contained within process sets. Processes are mapped out using BPMN shapes and BPMN properties. These shapes are used to represent the activities in your process map and to allow for greater flexibility in designs of your maps. Web Modelers can input the right information about the processes and its activities under the Details Section.

The Process Edit section will cover the following:

1. Create Process Objects
2. Edit Process Maps
3. Edit Process Details
4. Delete Process Objects
5. Publish Process Objects
6. Process Approval Cycle
7. Process Security

12.2.1 Create Process Objects

Web Modelers can create new Process Objects on the Web App. These objects can be Process Sets, Processes or Flow Objects. Web Modelers can create new process objects by clicking on the NEW icon or directly through the Details Page of a Process Set or Process.

This section will cover how to Create Process Objects on the EPC Web App:

1. Create a Process Set
2. Create a Process: New Button
3. Create a Process: Details Tab

12.2.1.1 Create a Process Set

Process Sets contain groups of related processes arranged in a hierarchical structure. Process sets enable Web Modelers to organize an organization's processes to simplify navigation.

Web Modelers can create new Process Sets on the WebApp.

To Create a **New Process Set**, please follow the Create Sets instructions.

12.2.1.1.2 Create a Process – New Button

A Process is an organized group of related activities, tasks and procedures, that together create a result of value to the customer, and once completed, will accomplish an organizational goal.

In the context of EPC, Processes can be under a set, or under another process as a sub-process. There can be many levels of processes; these are arranged in a hierarchical structure to simplify navigation and organization.

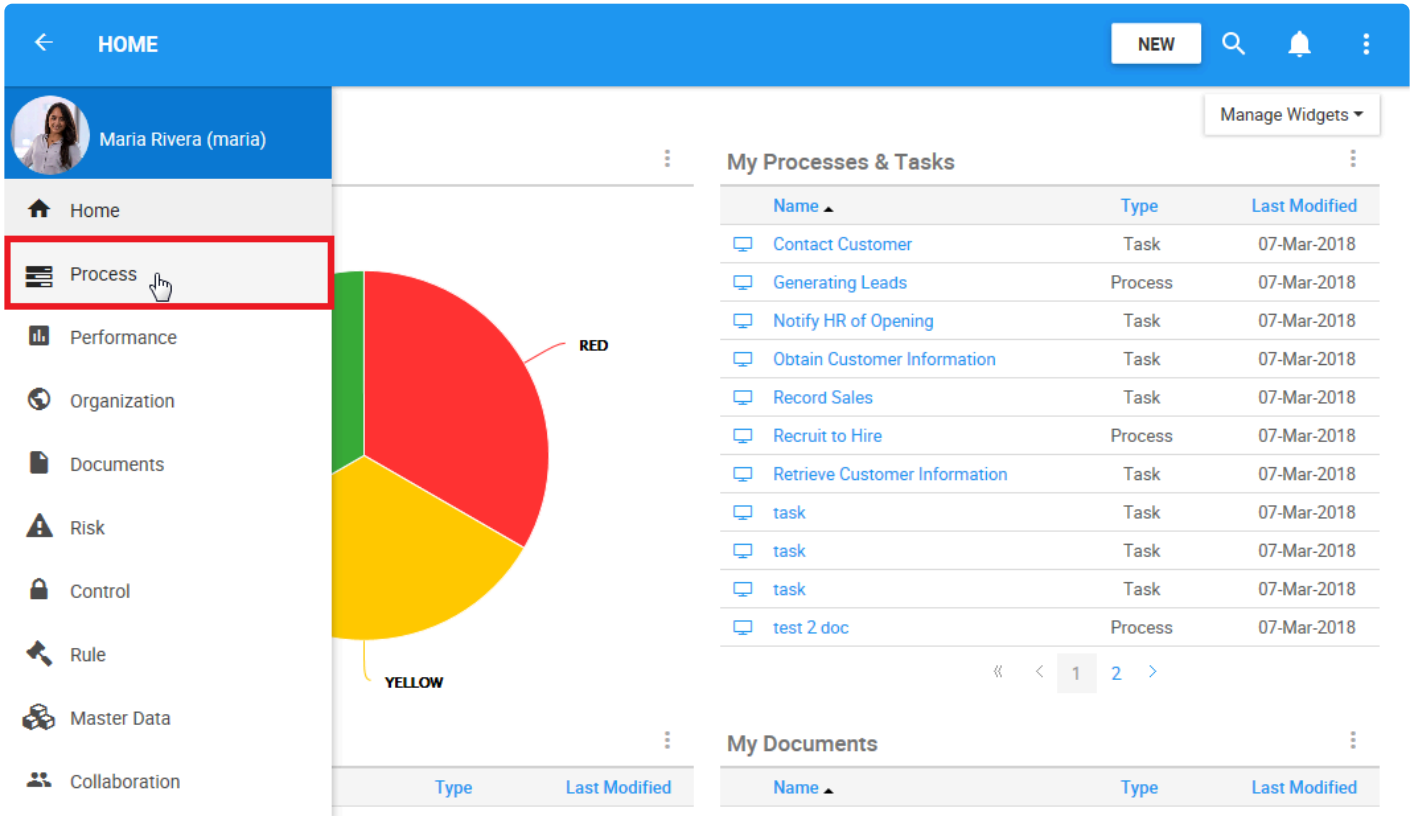
Web Modelers can create new Processes on the WebApp. There are two ways to create a Process:

1. Via the NEW on the top-right of the EPC WebApp
2. Via the Details tab of a Set or Process (to create a sub-process): Create a Process: Details Tab

To create a new Process using the **New** button, please follow the instructions below:

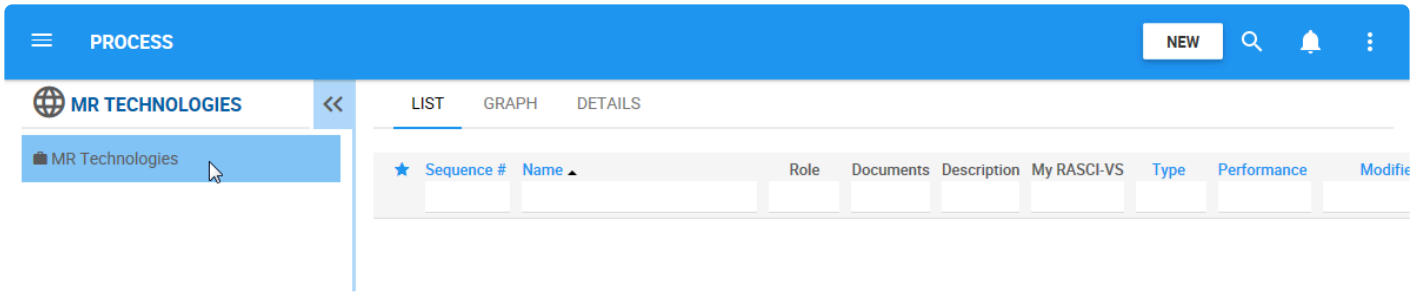
1. Click on the Navigation Menu Button on the top left of your screen and navigate to the Process Module

> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

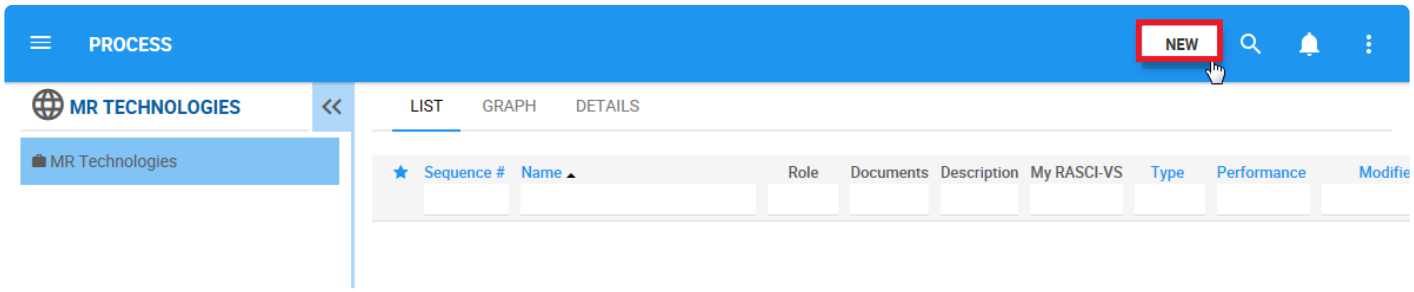


2. Choose the Process Set or Process (to create a sub-process) under which you would like to add the process

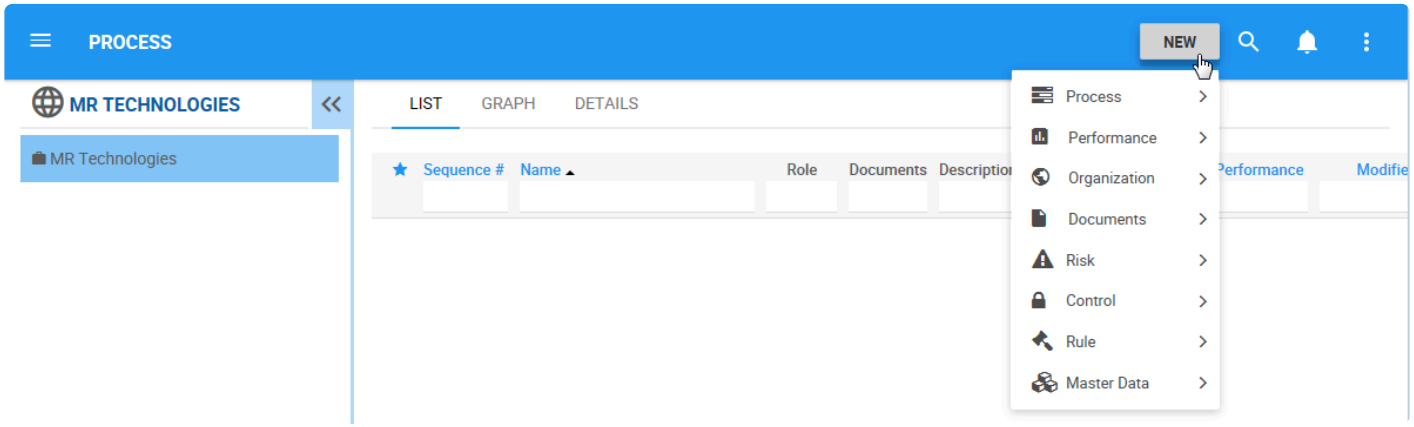
> It is very important you are under the right Process Set or Process in the structure, since it cannot be modified



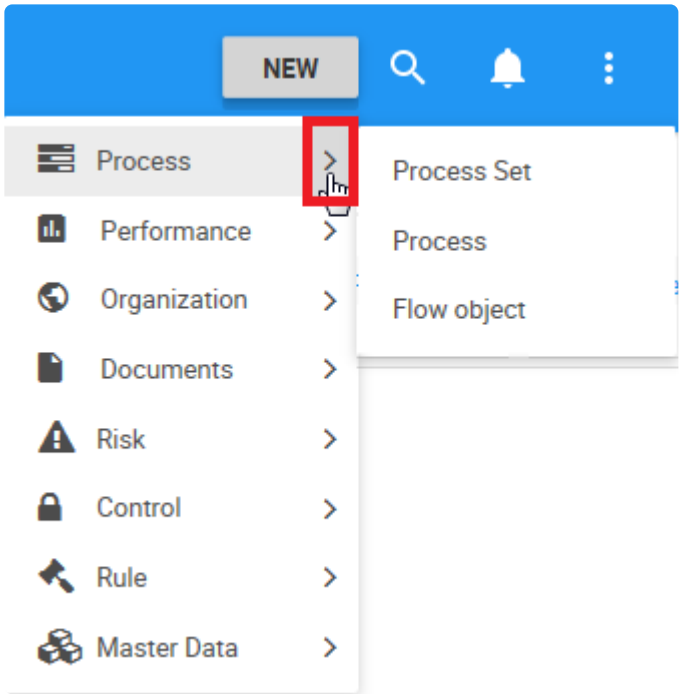
3. Navigate to the NEW button on the top-right of the EPC WebApp page.



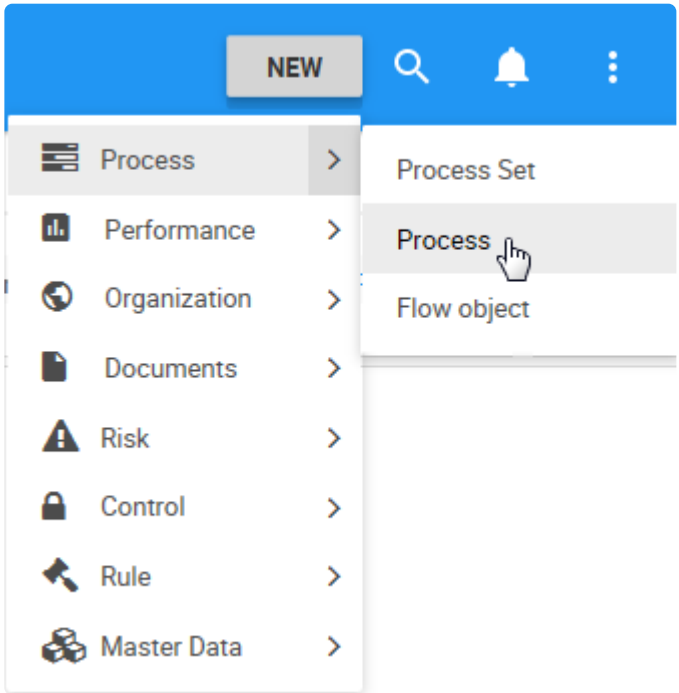
4. After clicking on the NEW button, a drop-down menu will appear with all the modules of the EPC where a new object can be created.



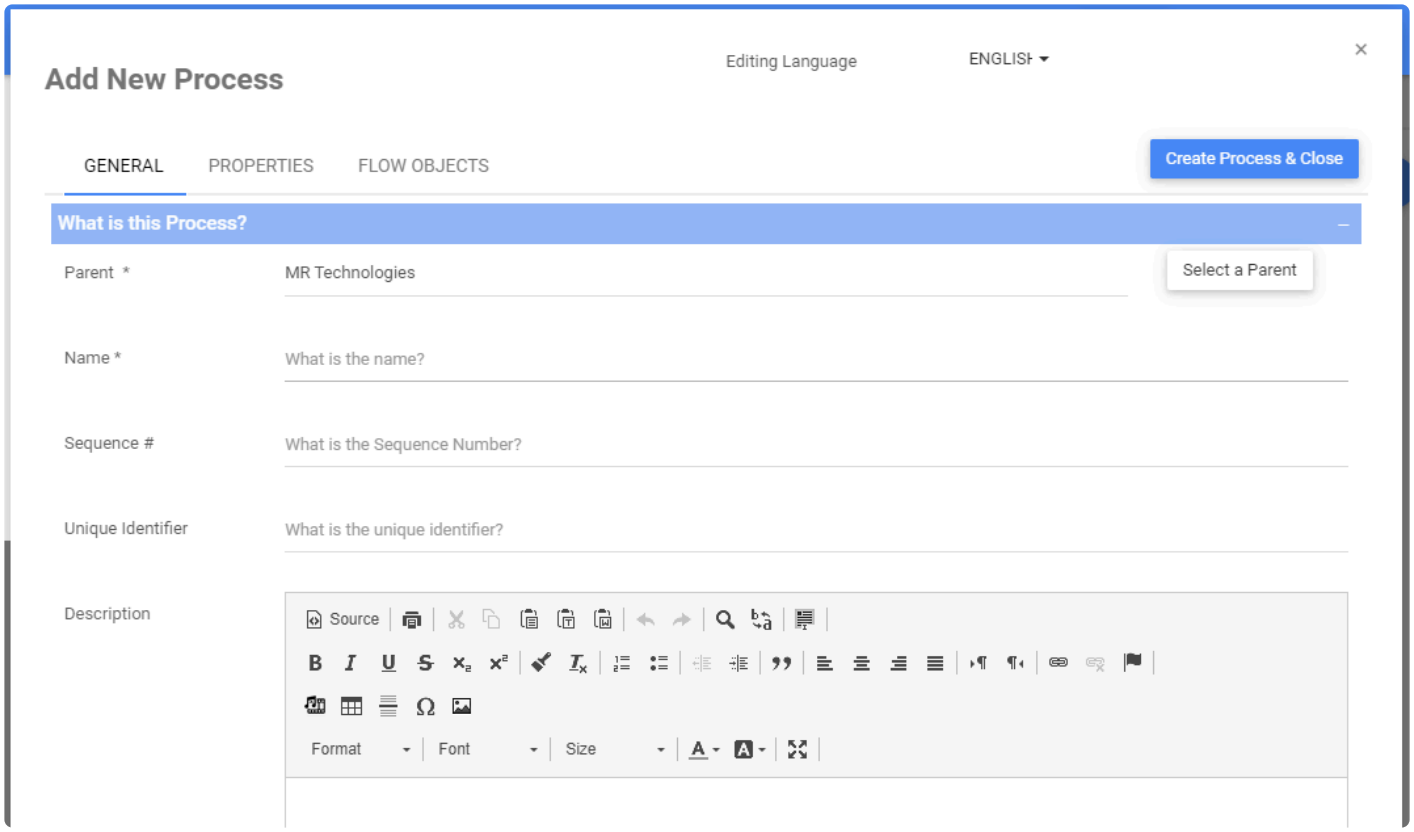
5. Navigate to the Process box and click on the > icon. Another drop-down menu will appear with the three different objects that can be created within the Process Module.



6. Click on the “Process” box to create a new Process



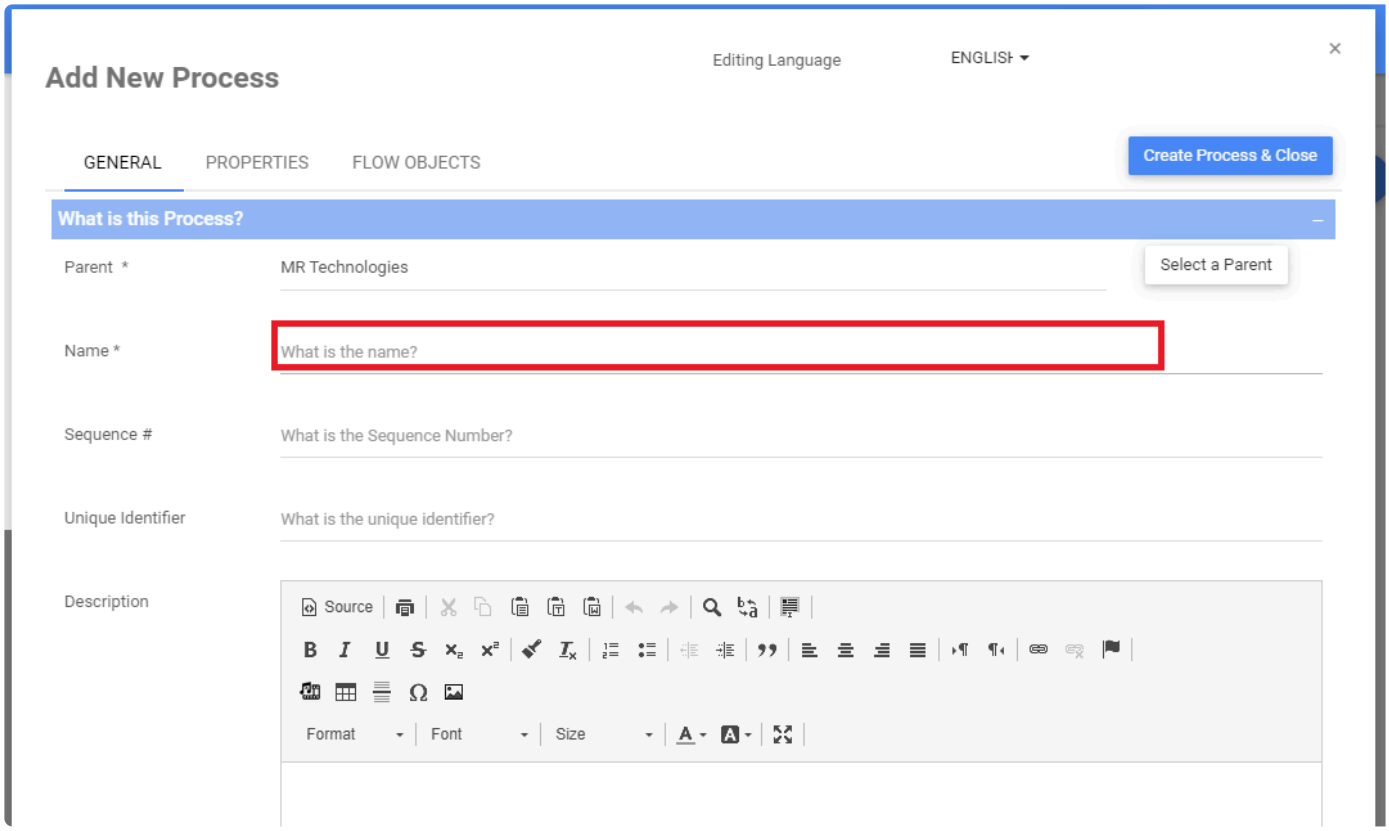
7. A window will be generated where you can input the information about the new Process



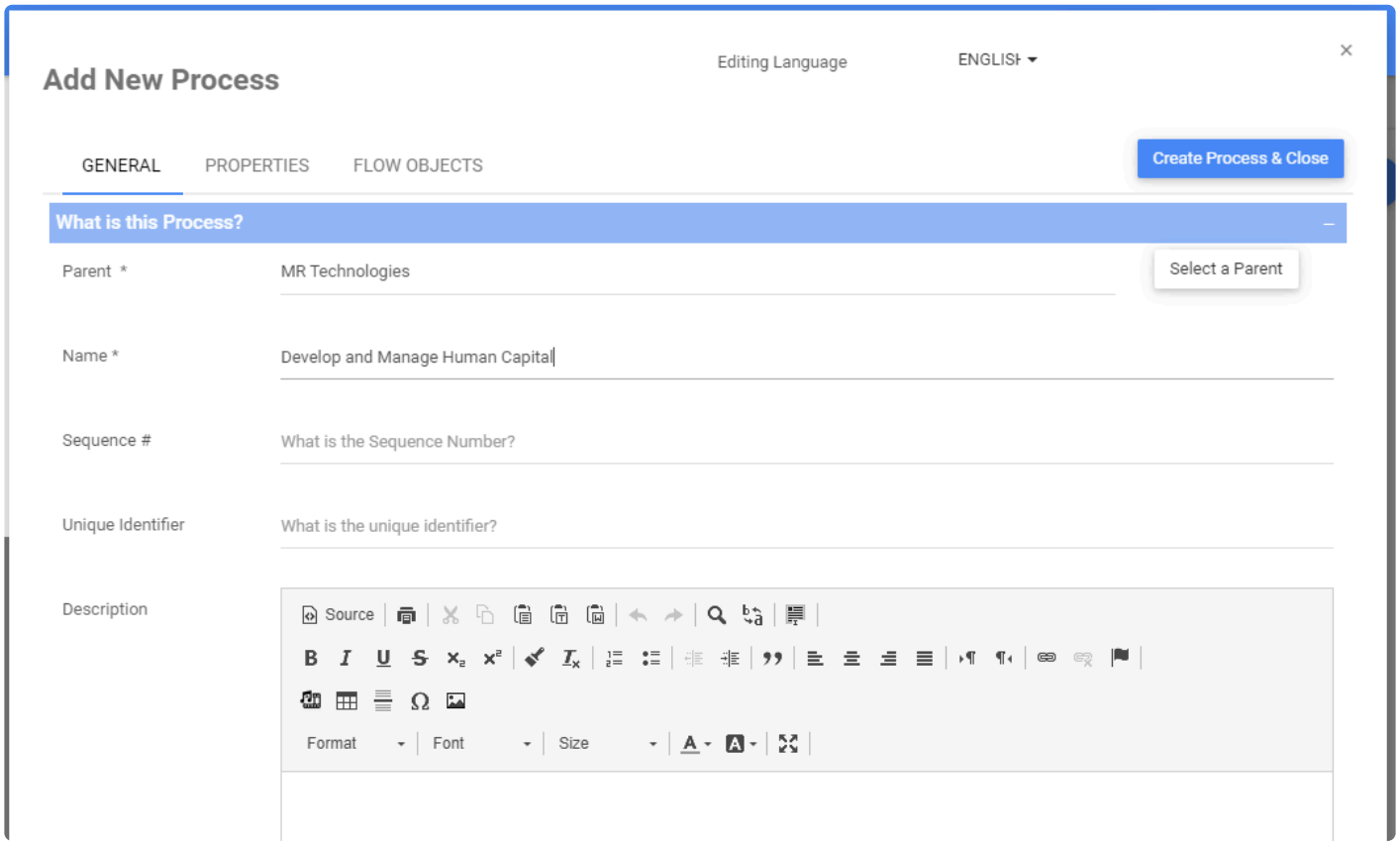
The EPC automatically assigns the Process Set or the Process as the Parent, which is the set or sub-process you selected. The Parent field is blocked and cannot be edited.

8. Type the name of the Process on the “What is the name?” field

It is **mandatory** for Web Modelers to input a name for the Process



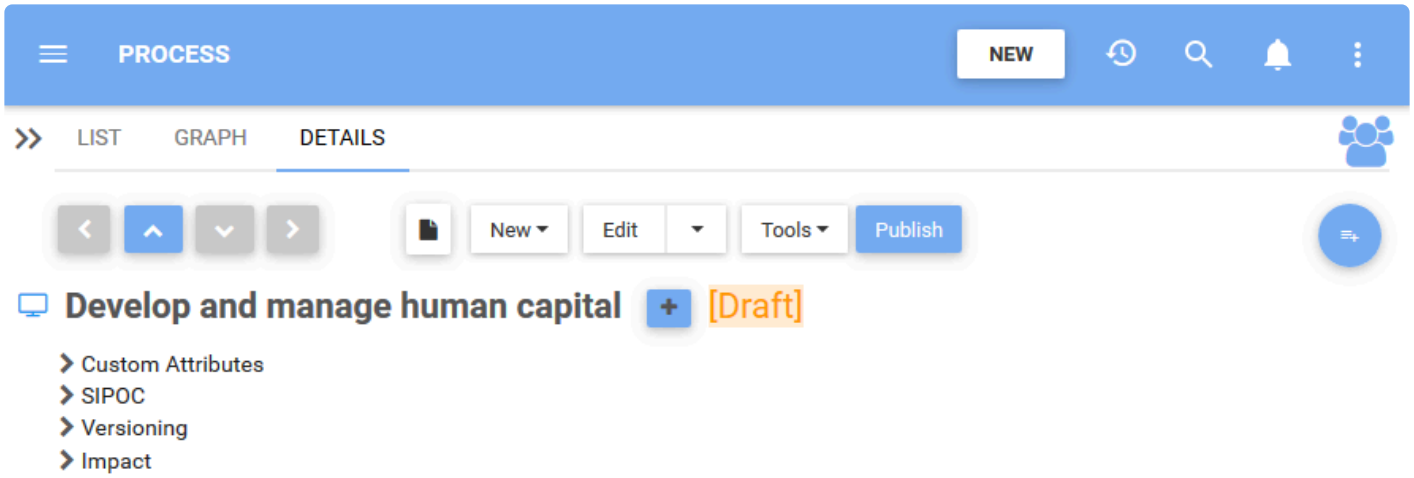
For this example, the name of the Process is “Develop and Manage Human Capital”



The new Process window has three tabs, General, Properties and Flow Objects. Under each tab there are different sections where the Web Modeler can input detailed information about the process. To learn more about about each section and how to input information, click here

9. Click on the button Create Process & Close to create the new Process

10. The new Process “Develop and Manage Human Capital” is now on the Process tree structure. This process is currently a draft. To learn how to publish Process objects, click here

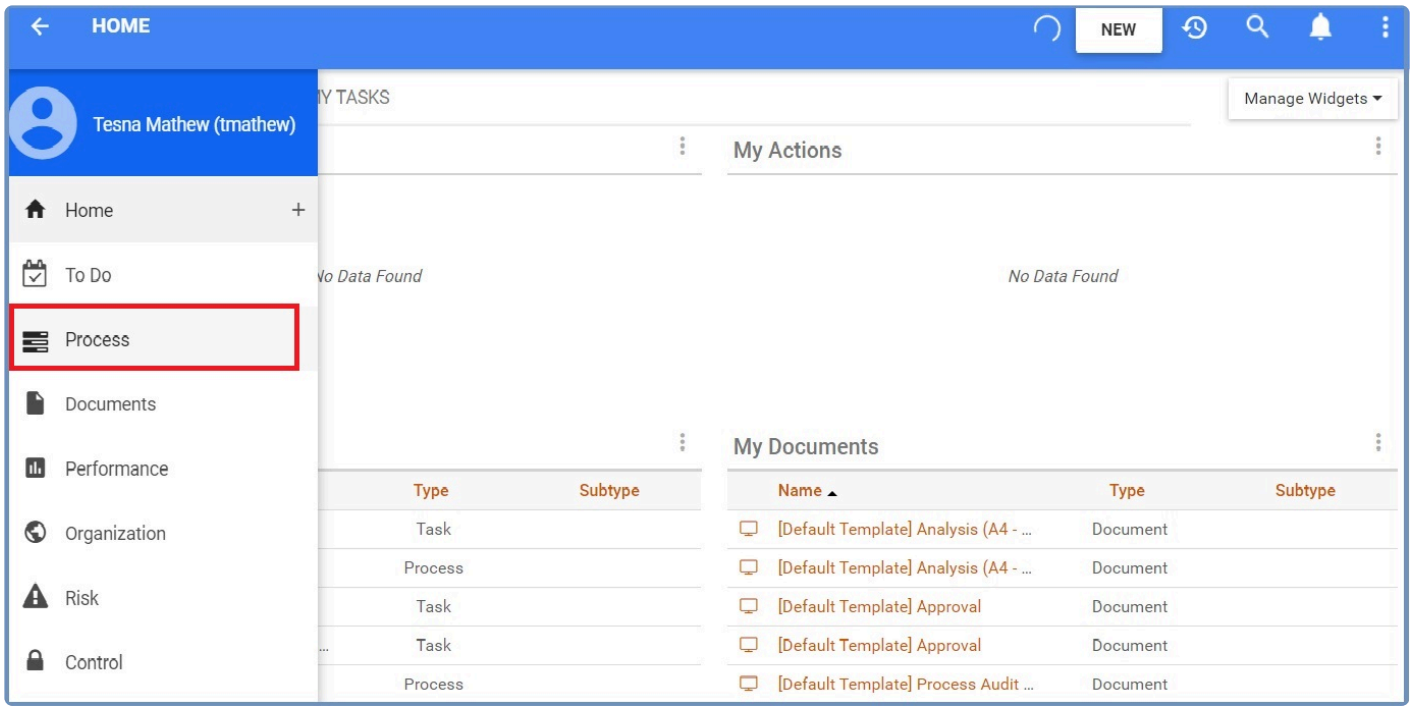

PROCESS
NEW
LIST
GRAPH
DETAILS
New
Edit
Tools
Publish
Develop and manage human capital
[Draft]
Custom Attributes
SIPOC
Versioning
Impact

12.2.1.1.2.1 Create a Process – Tree

Web Modelers can create, edit and delete the Processes quickly on the WebApp by right clicking on the process.

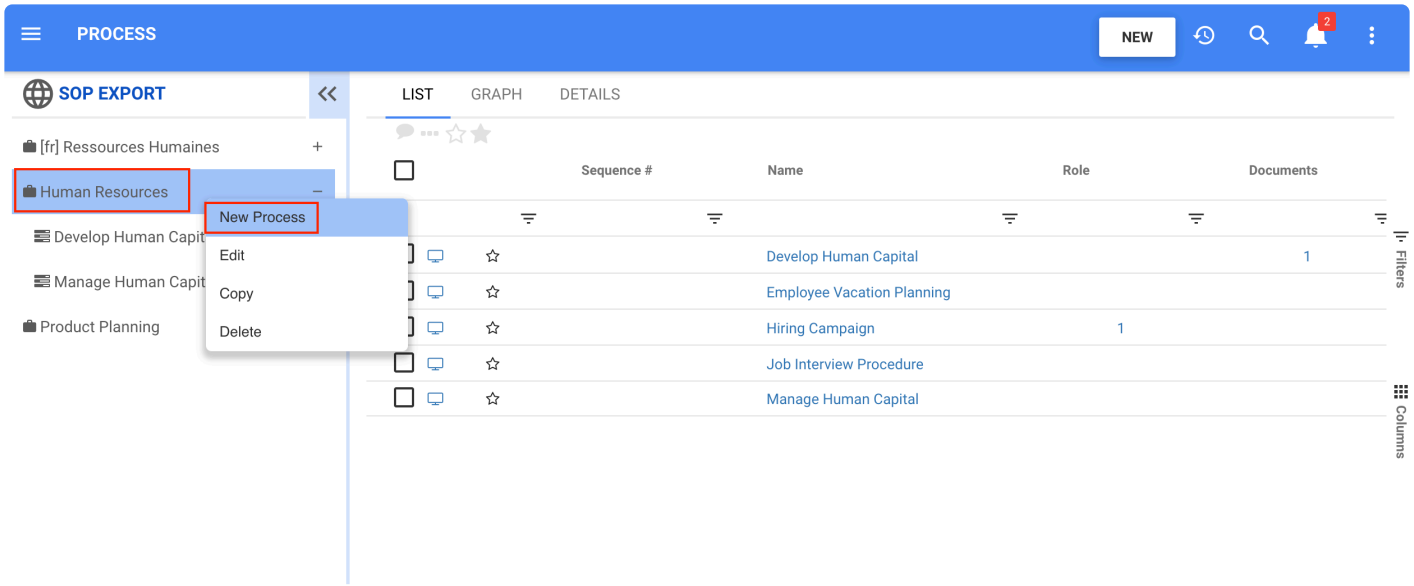
1. Click on the Navigation Menu Button on the top left of your screen and navigate to the Process Module.

> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.



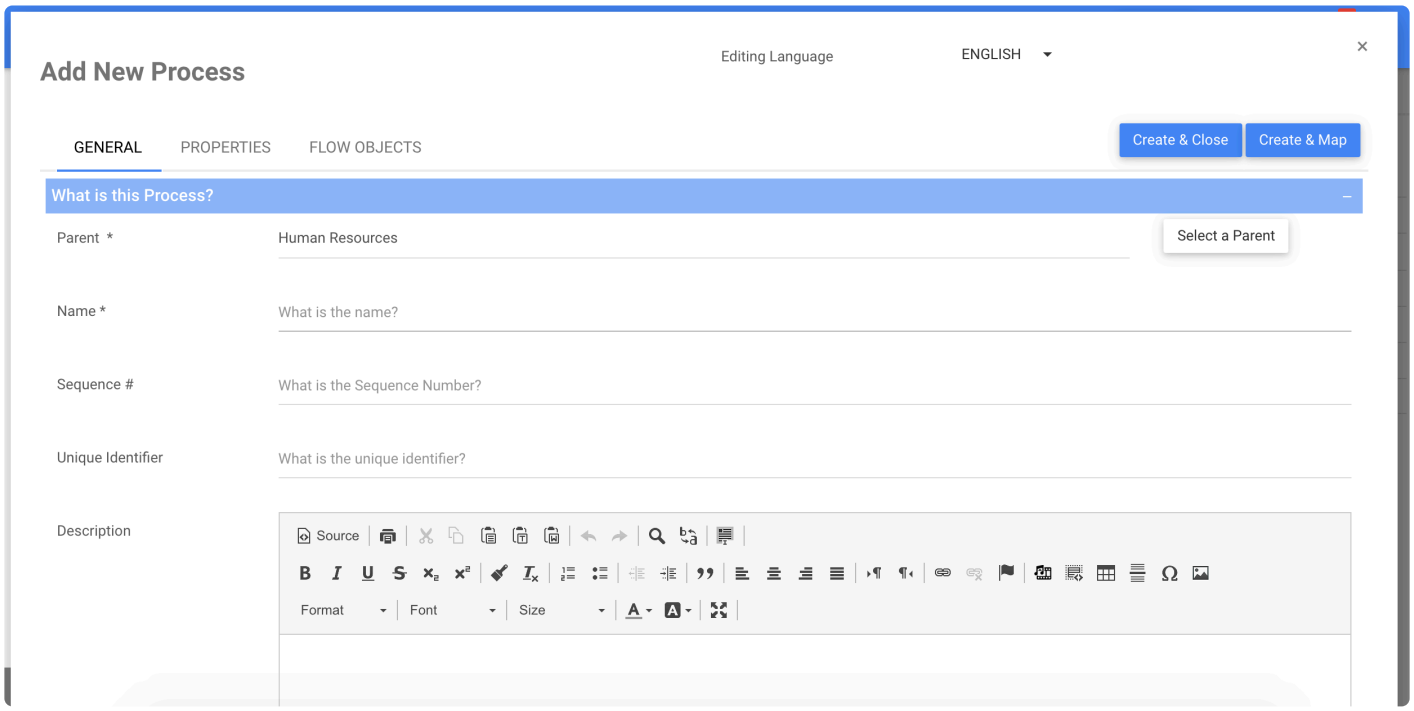
2. Choose the Process Set or Process.

3. Right-click and select one of the displayed menu options that will appear on the right side. For example, we can create a “New Process”.



4. Click on the New Process.

5. A window will be generated where you can input the information about the new Process.



> The EPC automatically assigns the Process Set or the Process as the Parent, which is the set or sub-process you selected. The Parent field is blocked and cannot be edited.

6. Add the information about the New process and click on the **Create & Close** button.

12.2.1.1.3 Create a Process – Details Tab

A Process is an organized group of related activities, tasks and procedures, that together create a result of value to the customer, and once completed, will accomplish an organizational goal.

In the context of EPC, Processes can be under a set, or under another process as a sub-process. There can be many levels of processes; these are arranged in a hierarchical structure to simplify navigation and organization.

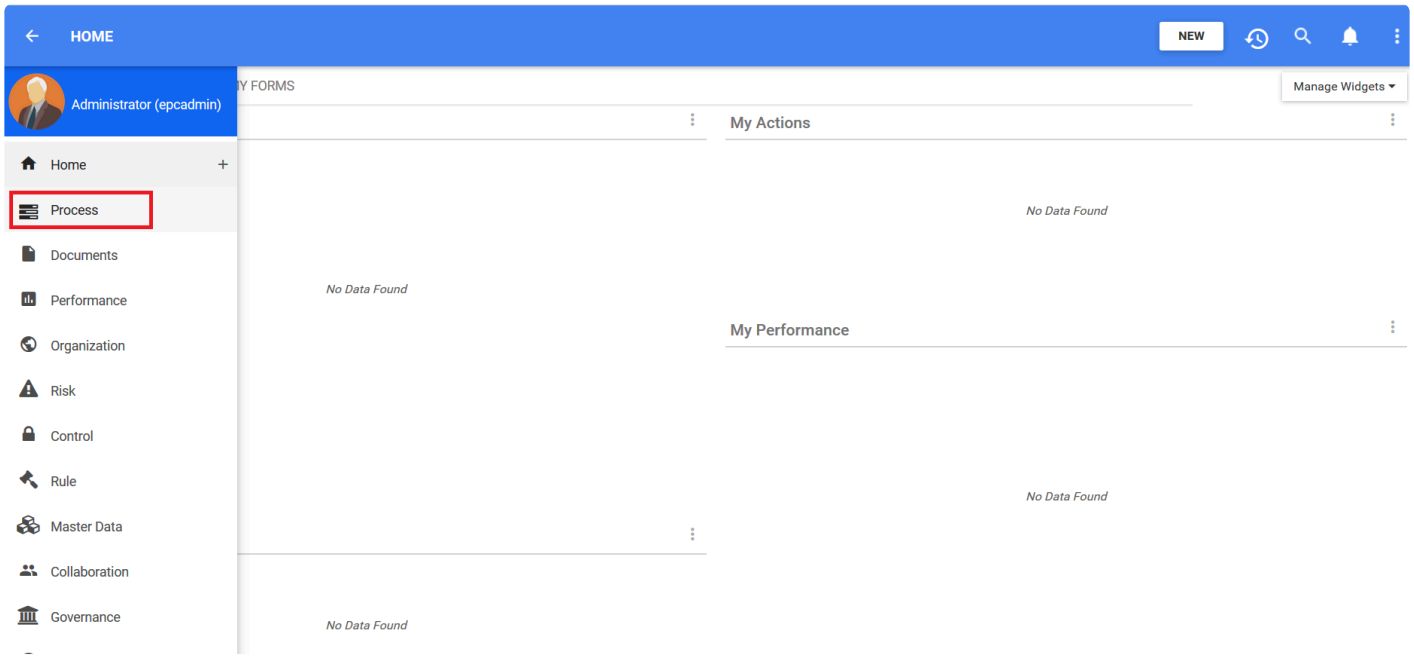
Web Modelers can create new Processes on the WebApp. There are two ways to create a Process:

1. Via the NEW on the top-right of the EPC WebApp: Create a Process – New Button
2. Via the Details tab of a Set or Process (to create a sub-process)

To create a new Process via the details tab of a set of sub-process, please follow the instructions below:

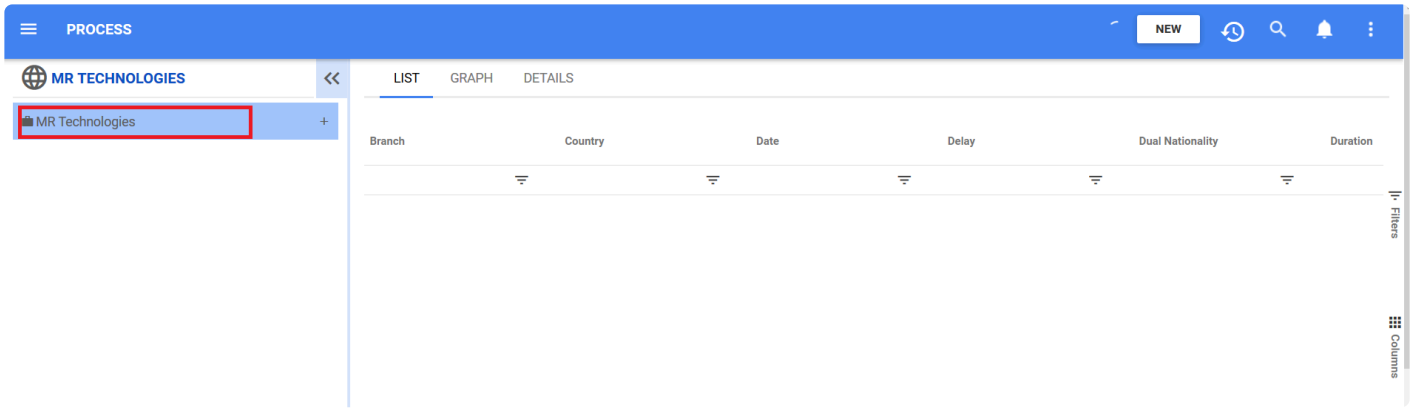
1. Click on the Navigation Menu Button on the top left of your screen and navigate to the Process Module

> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

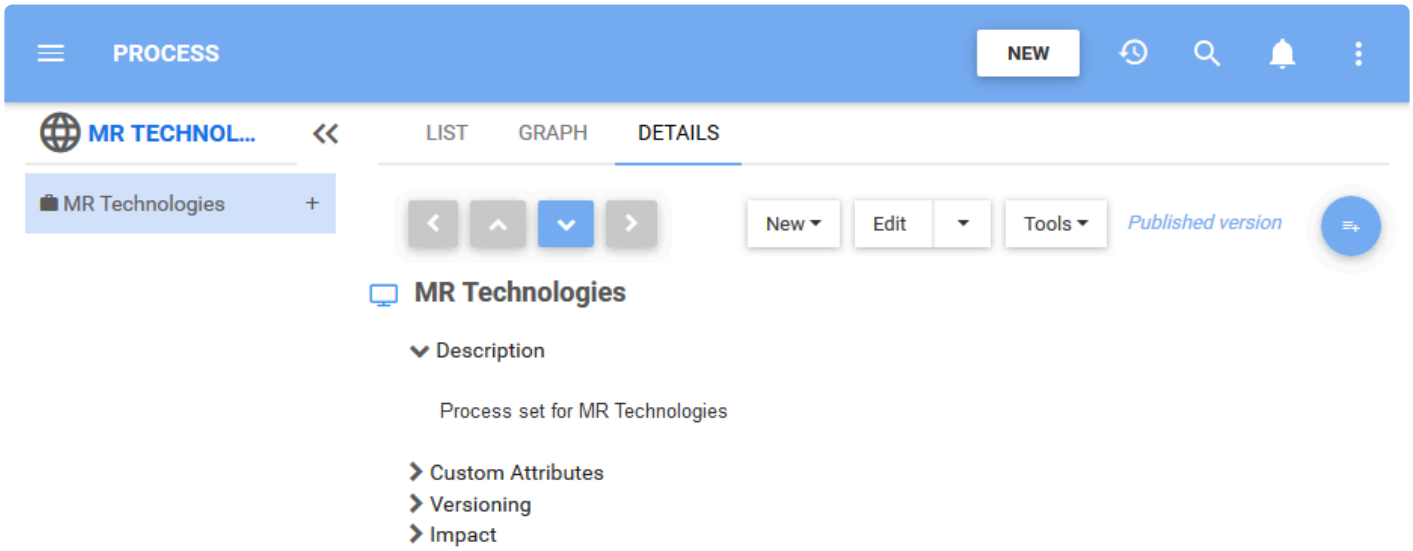


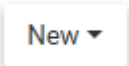
2. Choose the Process Set or Process (to create a sub-process) under which you would like to add the process

It is very important you are under the right Process Set or Process in the structure, since it cannot be modified

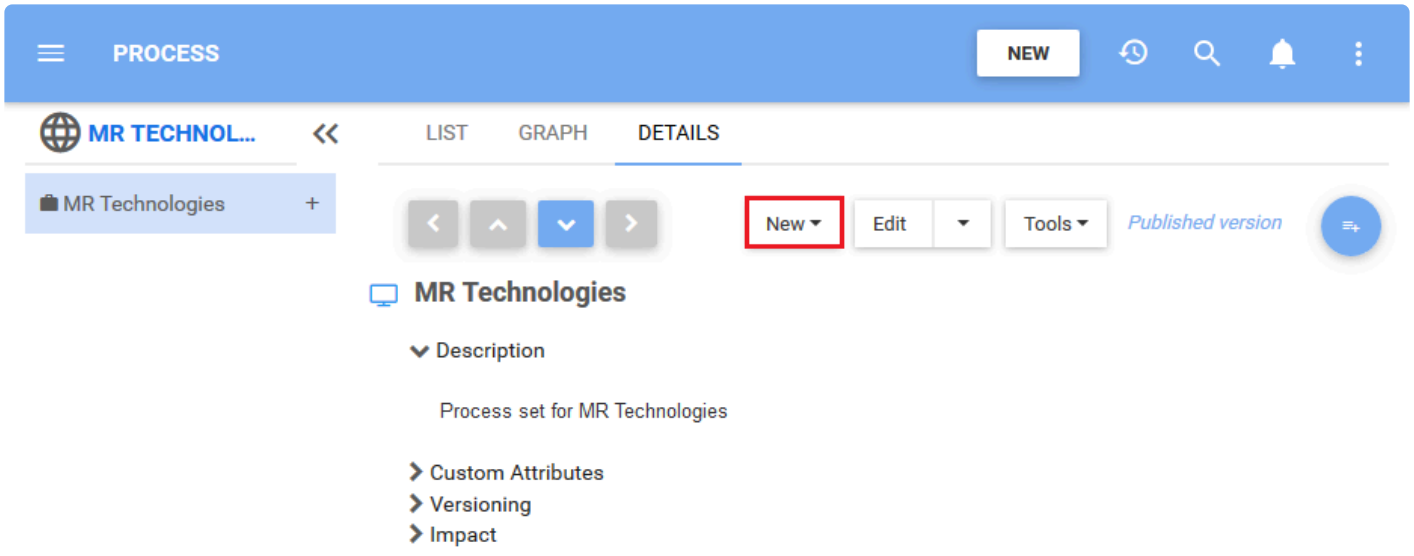


3. Navigate to the Details Tab of the Process Set or the Sub-Process

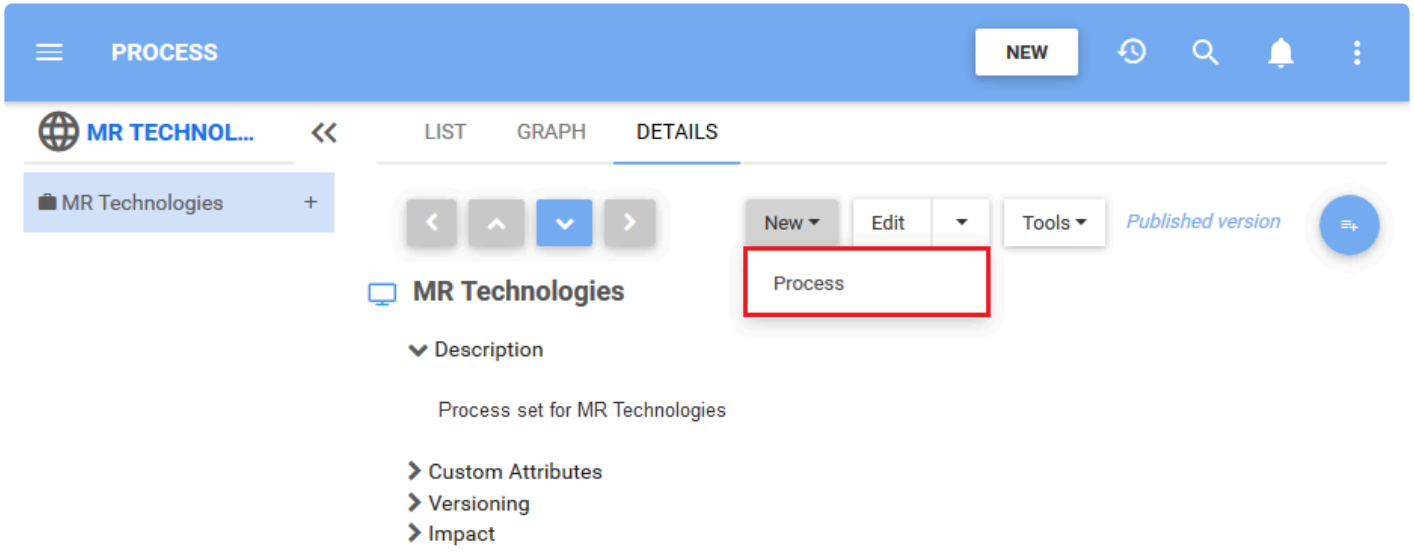


4. Navigate to the 

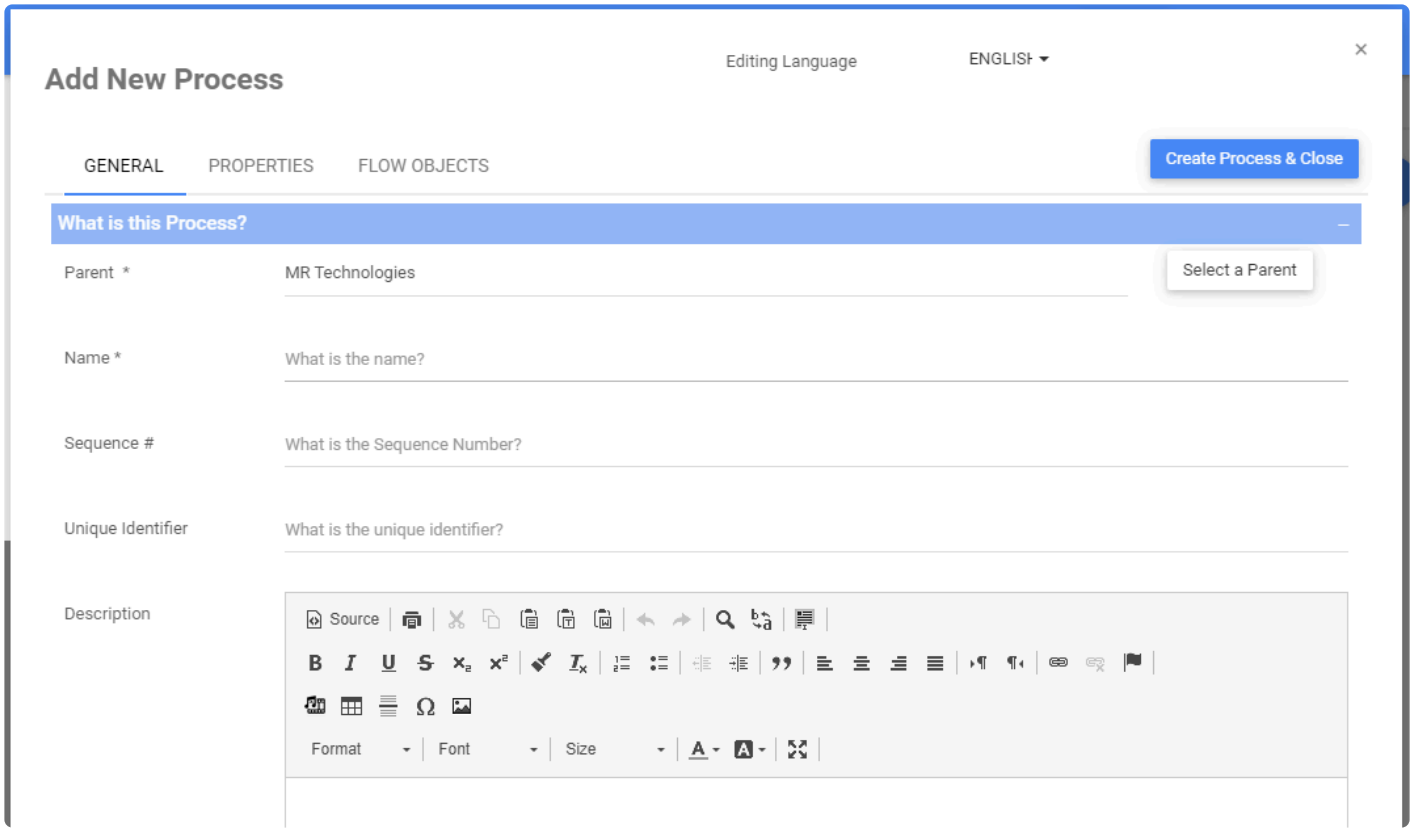
button



5. A drop-down will be generated. To add a new Process, click on the “Process” box



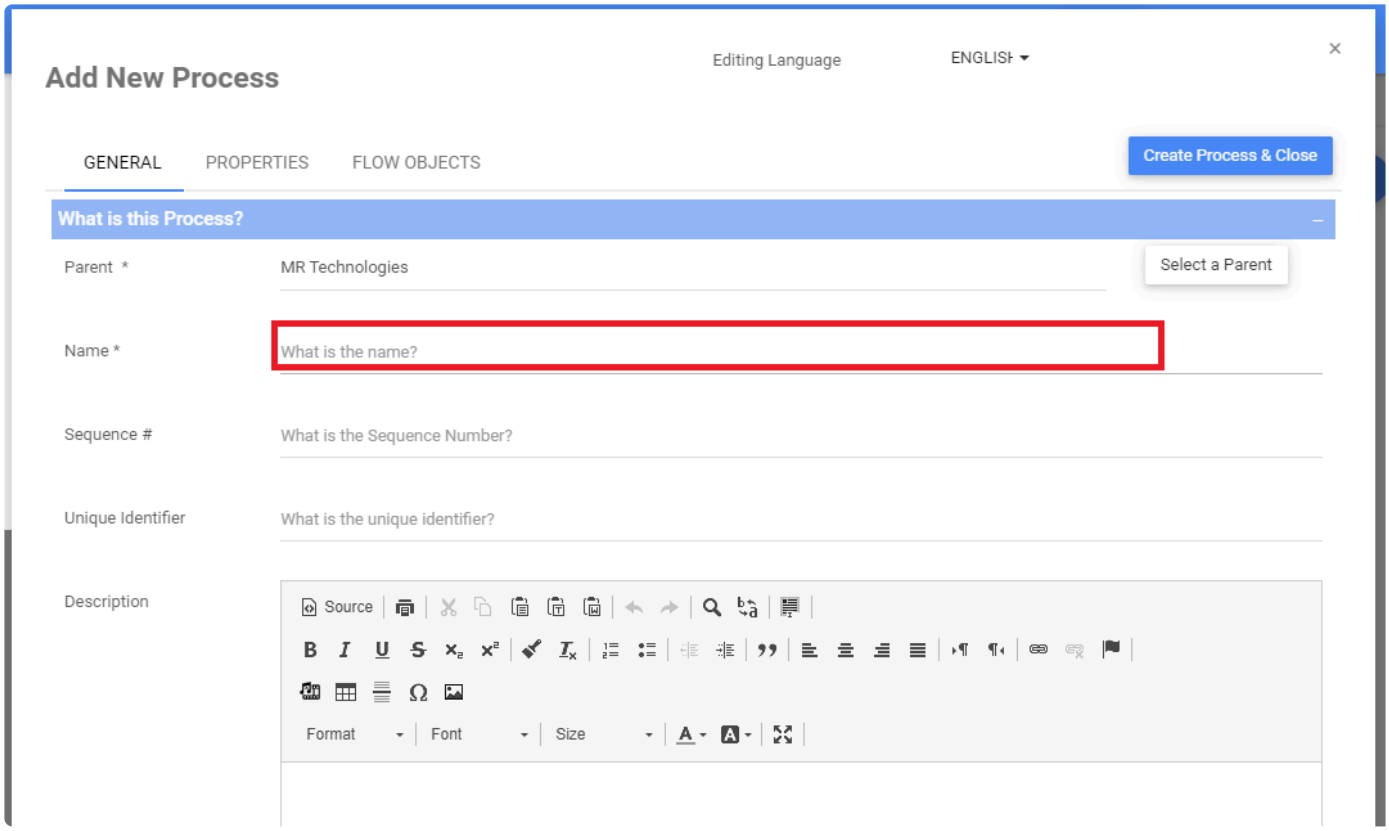
6. A window will be generated where you can input the information about the new Process



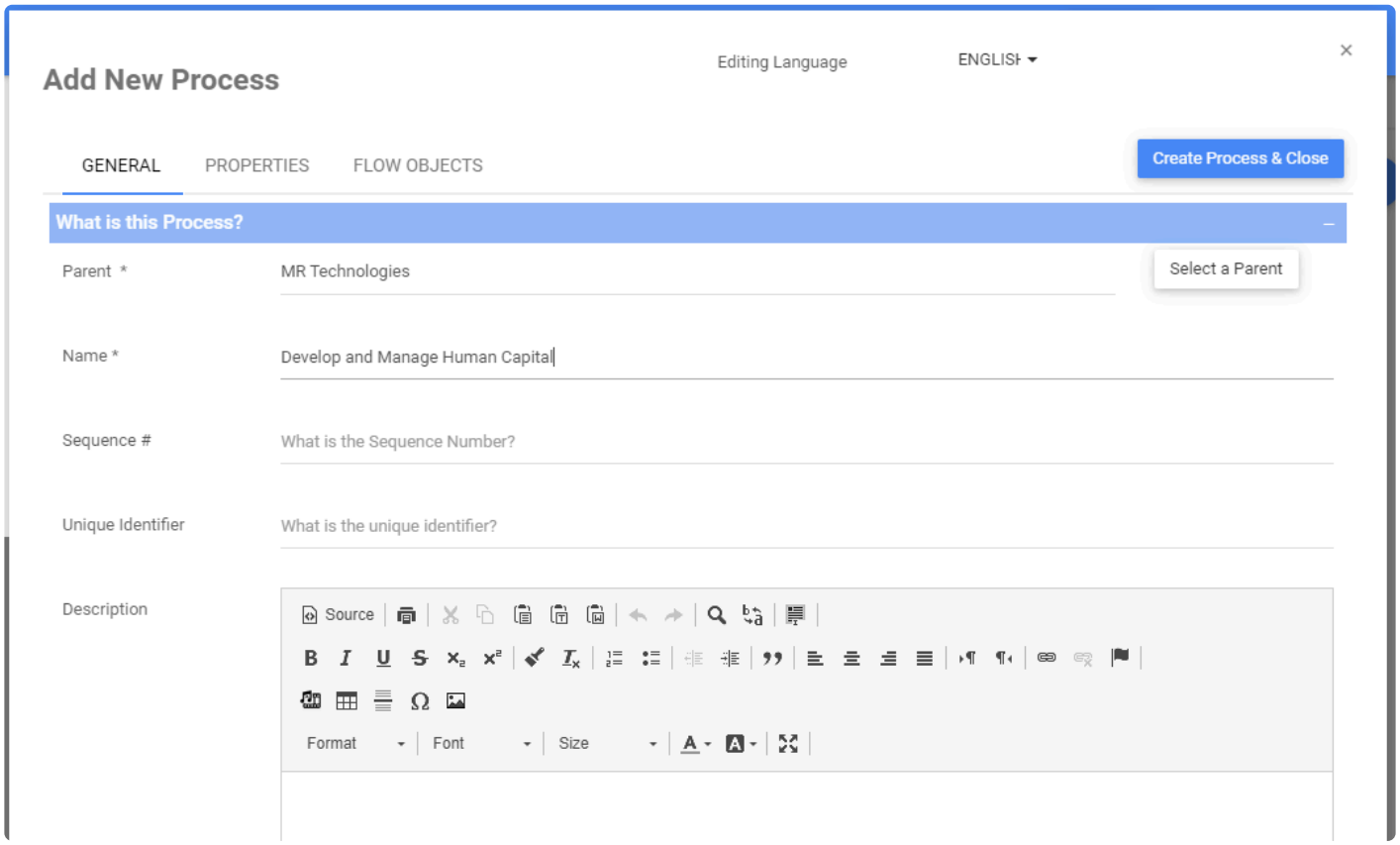
The EPC automatically assigns the Process Set or the Process as the Parent, which is the set or sub-process you selected. The Parent field is blocked and cannot be edited.

7. Type the name of the Process on the “What is the name?” field

It is **mandatory** for Web Modelers to input a name for the Process



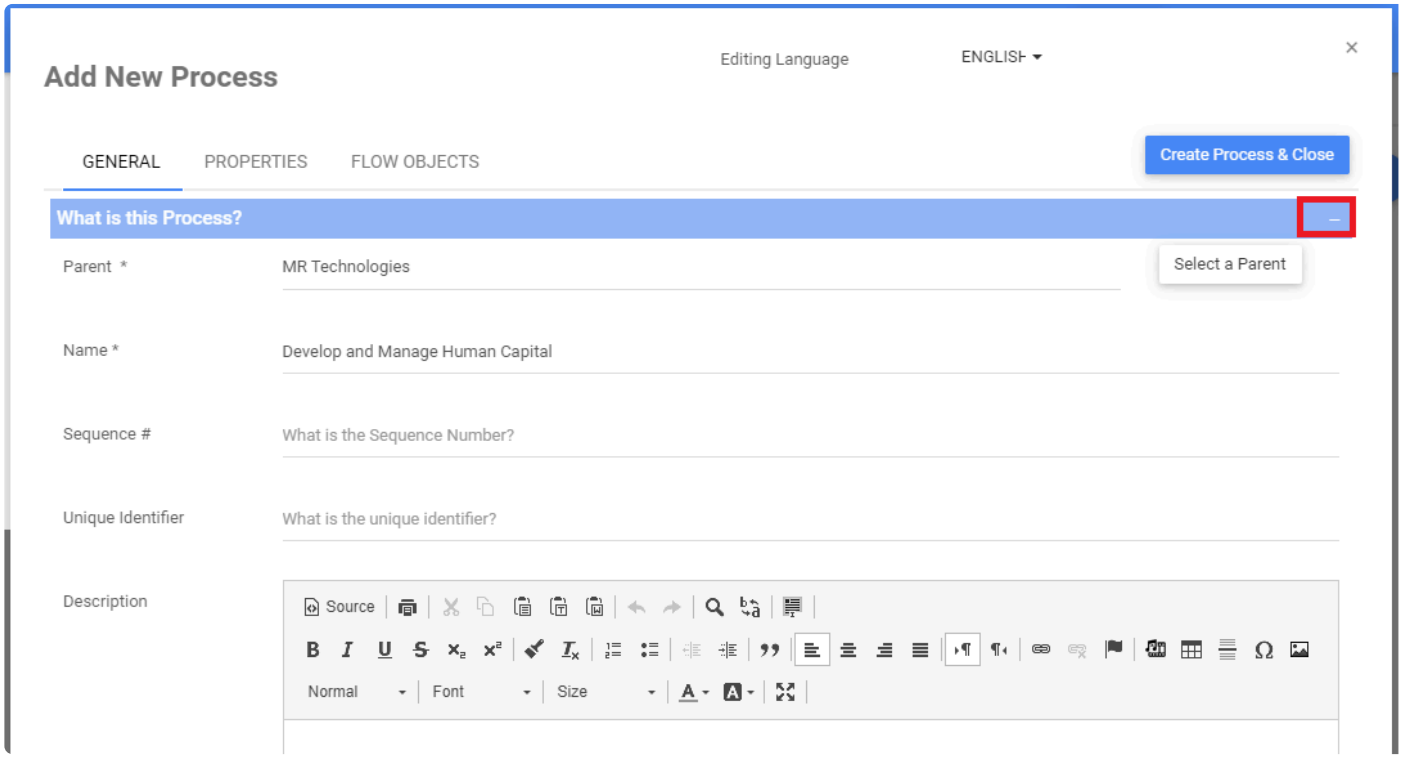
For this example, the name of the Process is “Develop and Manage Human Capital”



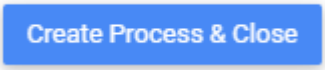
8. Use the + and − icons to expand and hide the different sections within the each tab of the New Process Window. Input the right information about the process in each section.

> The new Process window has three tabs, General, Properties and Flow Objects. Under each tab there are different sections where the Web Modeler can input detailed information about the process. To learn more about about each section and how to input information, click here

i) To hide sections, click on the − icon:

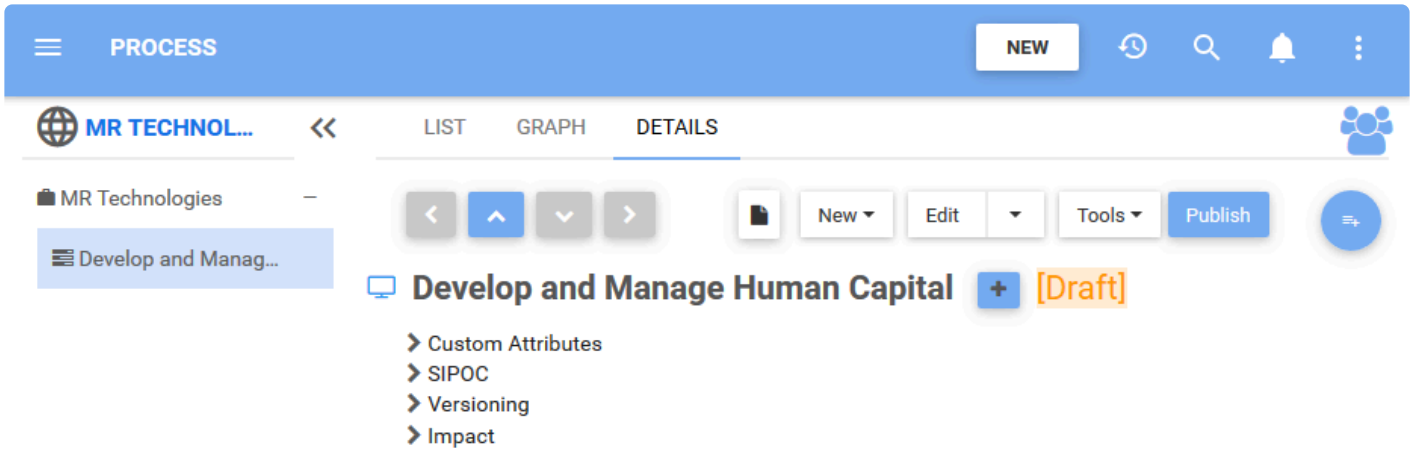


ii) To expand sections, click on the + icon:

9. Click on the button 

to create the new Process

11. The new Process “Develop and Manage Human Capital” is now on the Process tree structure. This process is currently a draft. To learn how to publish Process objects, click here


PROCESS
NEW
MR TECHNOL...
LIST
GRAPH
DETAILS
MR Technologies
Develop and Manag...
New
Edit
Tools
Publish
Develop and Manage Human Capital
[Draft]
Custom Attributes
SIPOC
Versioning
Impact

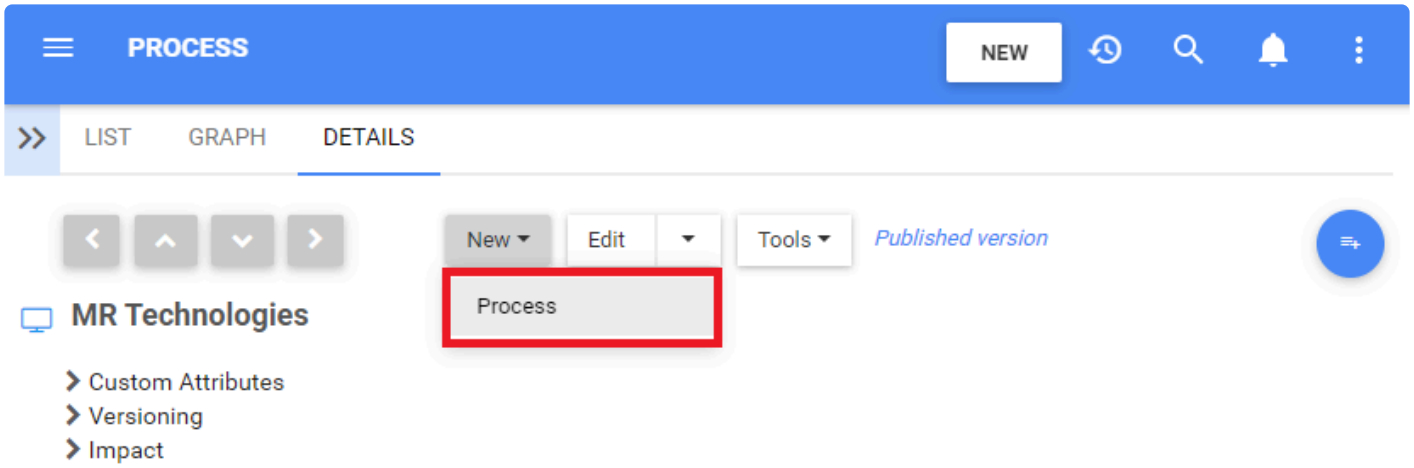
12.2.1.1.3.1 Create Flow Objects – Details Tab

This functionality allows users who aren't familiar with BPMN methodology's best practices to create flowobjects right from the details page of a new process.

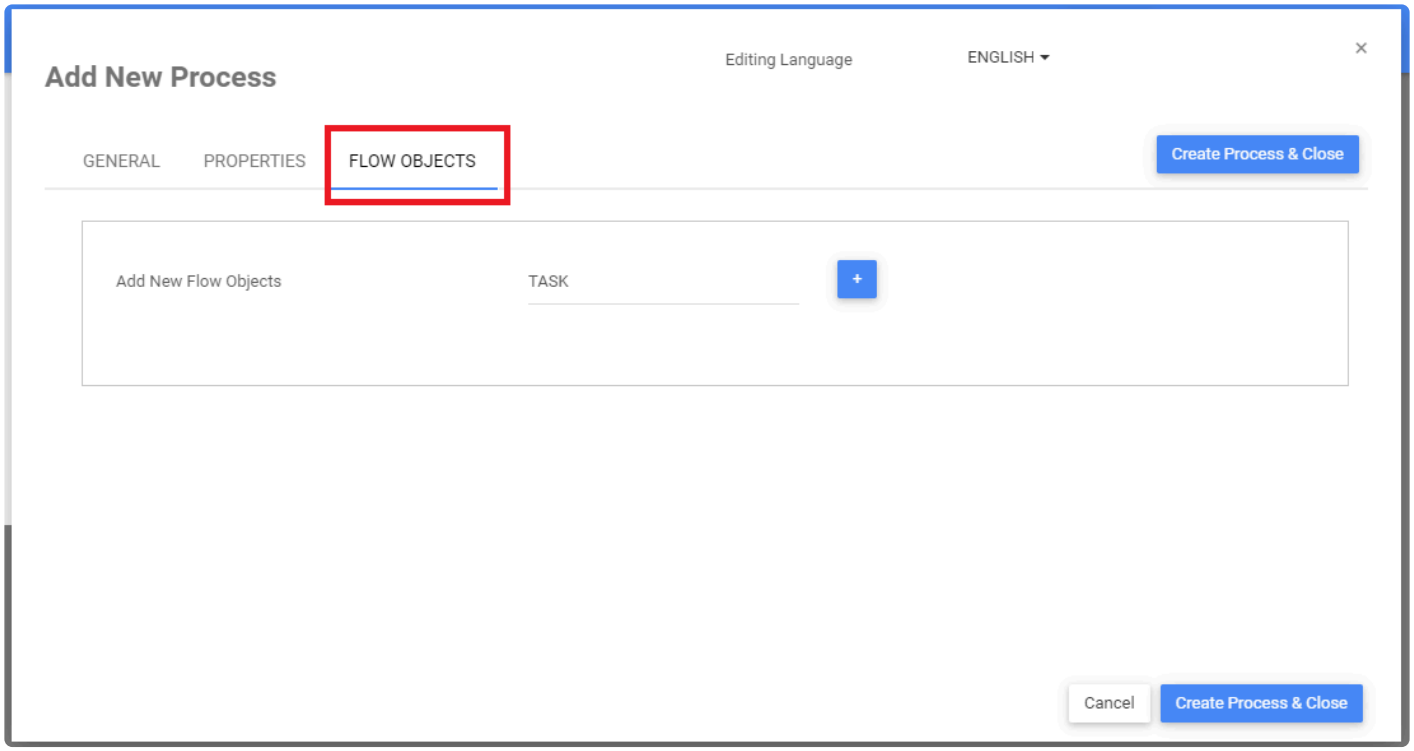
This component allows user to define:

- the type of flowobject: start event, task, gateways, sub process, or end event
- the description of the flowobject
- the role responsible for that flowobject

1. Click on new process from the details page

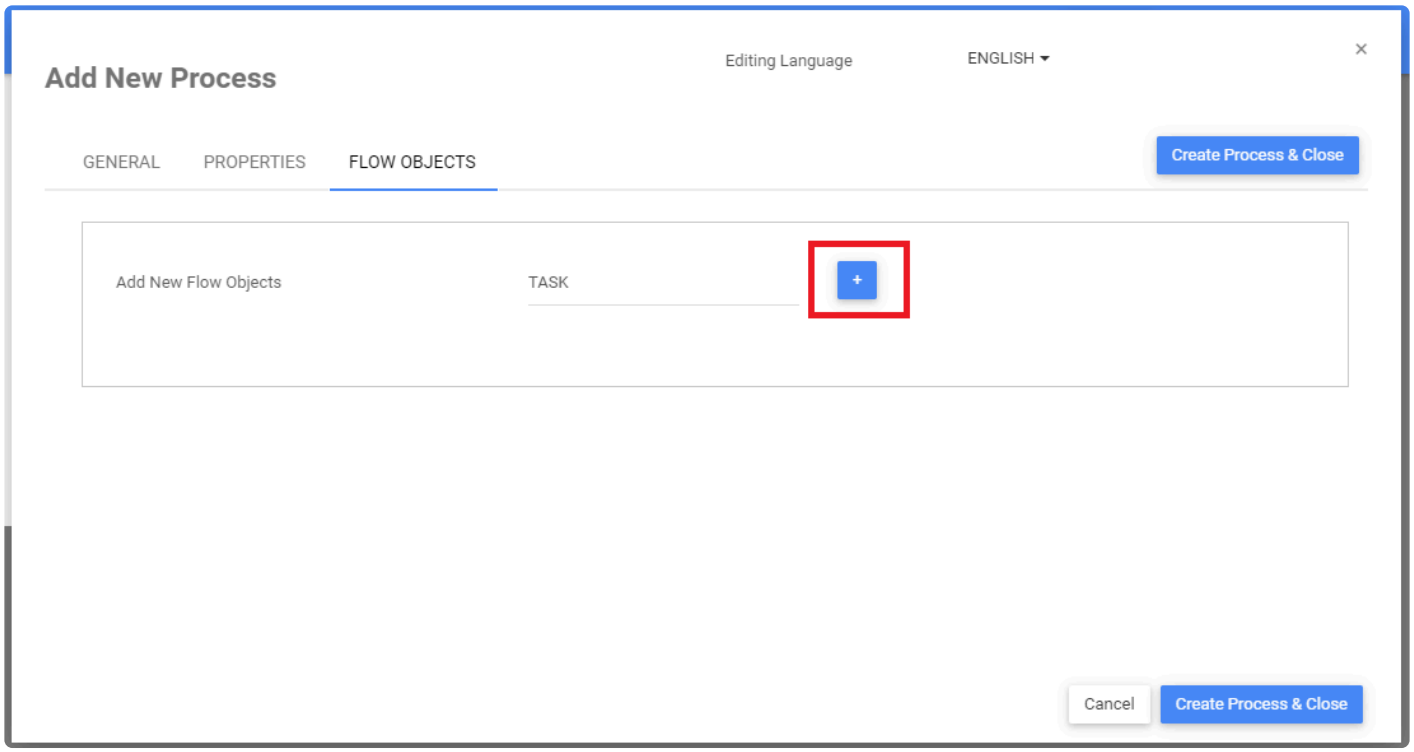


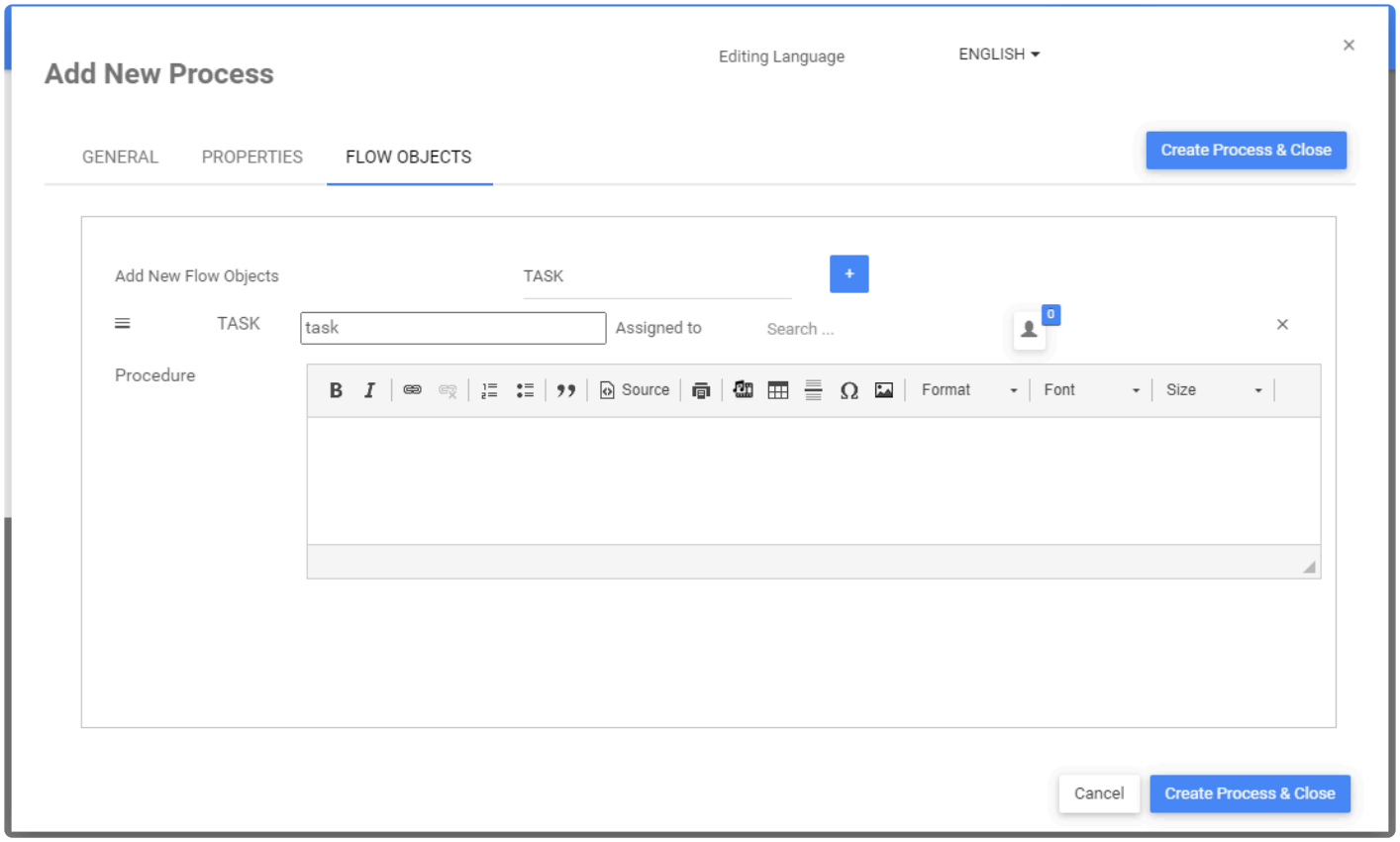
2. Navigate to the Flowobject Tab



3. Choose any of these flowobject options: start, end, task, gateway, sub process.

4. Click on the “+” button to add the new flow object.





You can modify the name of the flowobject, add a description & set roles as responsible for that flowobject.

12.2.2 Edit Process Graph

Web Modelers can map Processes on the Web App. They need to navigate to the Graph tab of the process and then click on the Edit button. They will be redirected to the Full Screen Edit Mode where they can map business processes using shapes.

Only users with the Web Modeler Permission will be able to see the Edit Button on the toolbar; the displayed content needs to be set to Show Latest, and the editing tool is the Web.

The Edit Process Graph section will cover the following:

1. Graph Edit Mode
2. Map a Process
3. Annotations
4. Boundary Events
5. BPMN Properties
6. IPLs
7. Edit Details
8. Inputs/Outputs

12.2.2.1 Graph Edit Mode

Web Modelers can map and edit graphs when they go on Edit Mode. Understanding how the Edit Mode works and the functions available to edit will allow Web Modelers to fully utilize the EPC.

To access the Edit Mode, Web Modelers will need to click on the Edit Button and they will be redirected to the Full Screen Edit Mode for graphs. Only users with the Web Modeler Permission will be able to see the Edit Button on the toolbar; the displayed content needs to be set to Show Latest, and the editing tool is the Web.

The Graph Edit Mode section will cover the following:

1. Edit Button for Graph
2. Edit Toolbar

12.2.2.1.1 Edit Button for Graph

The Edit Button is the function allowing Web Modelers to edit a graph. Only Web Modelers will be able to see this button on the toolbar. When clicking on this button, Web Modelers will go on **Edit Mode** and be redirected to the Full Screen Edit Mode where they can map and edit processes.

> To Edit a graph, Web Modelers need to be under the Graph tab, and the Map view

Edit Mode will open the Full Screen window to enable Web Modelers to have a bigger area to easily map graphs.

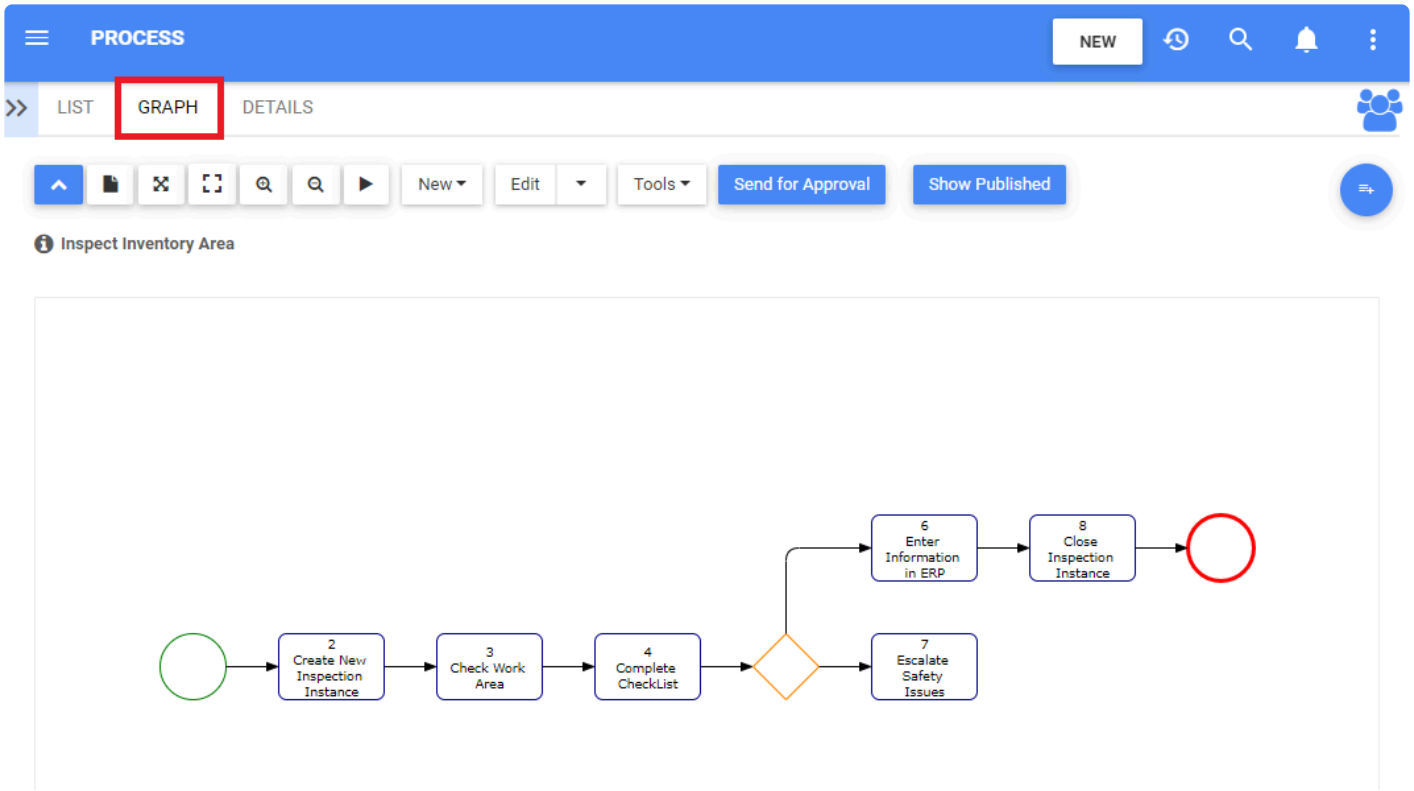
Only users with the Web Modeler Permission will be able to see the Edit Button on the toolbar; the displayed content needs to be set to Show Latest, and the editing tool is the Web.

> When you click on edit and If your user setting are different than the map's edit settings. Then the default user setting will be changed to the change to the map edit setting.

How to Use the Edit Button

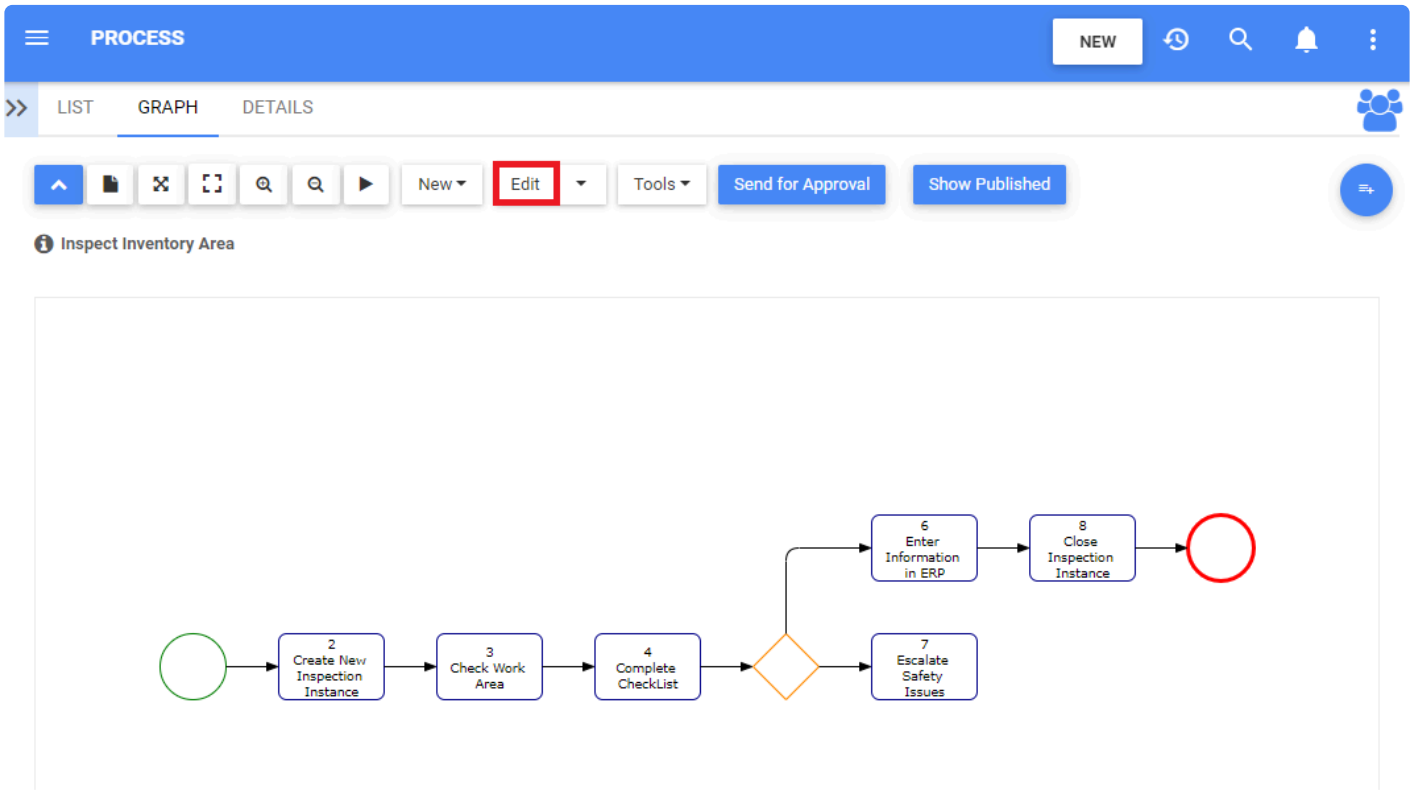
1. Navigate to the Process Module and choose the process you desire to edit

2. Navigate to the Graph section of the process. Ensure you are under the Map view

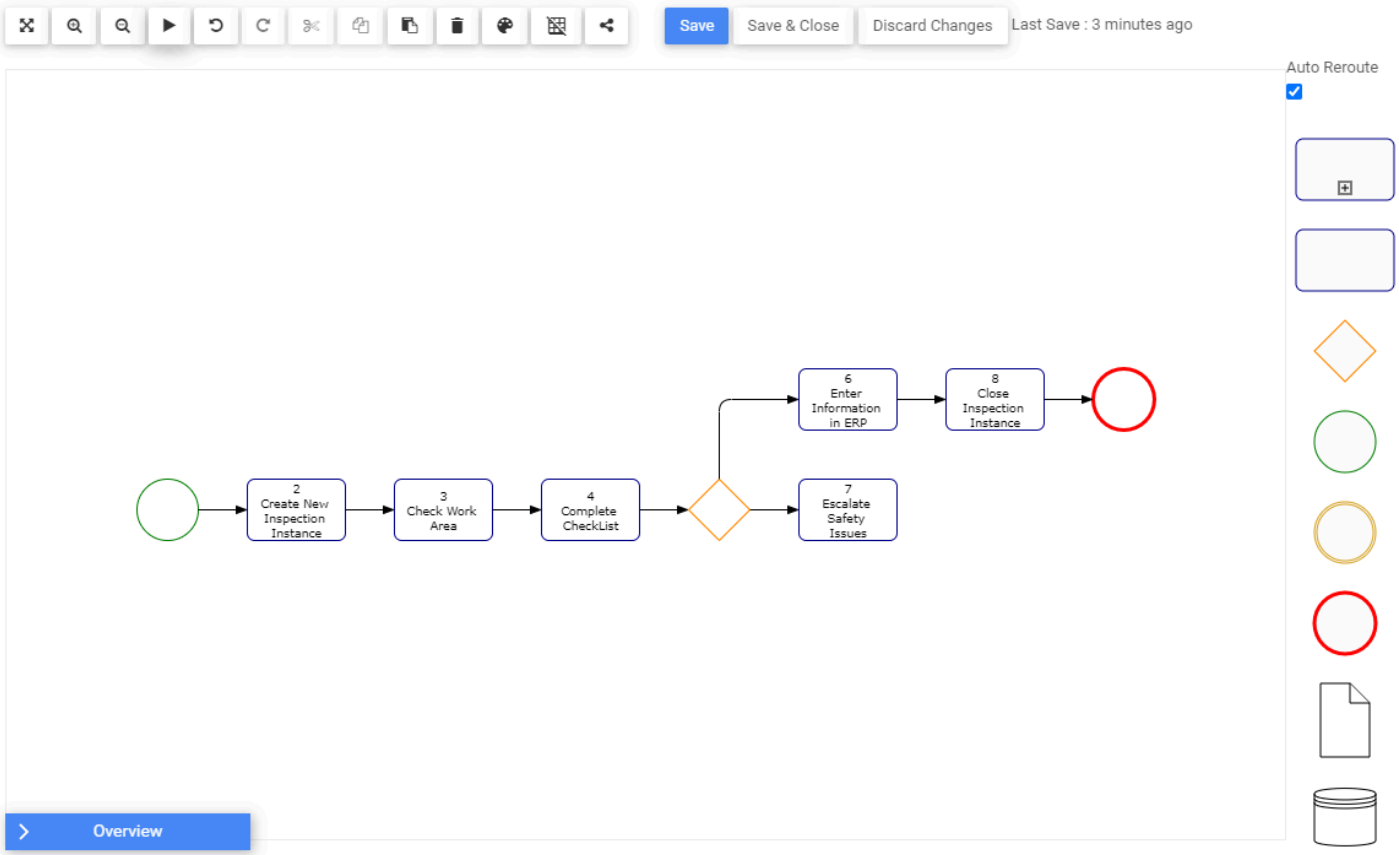


3. To edit the graph, click on the

button

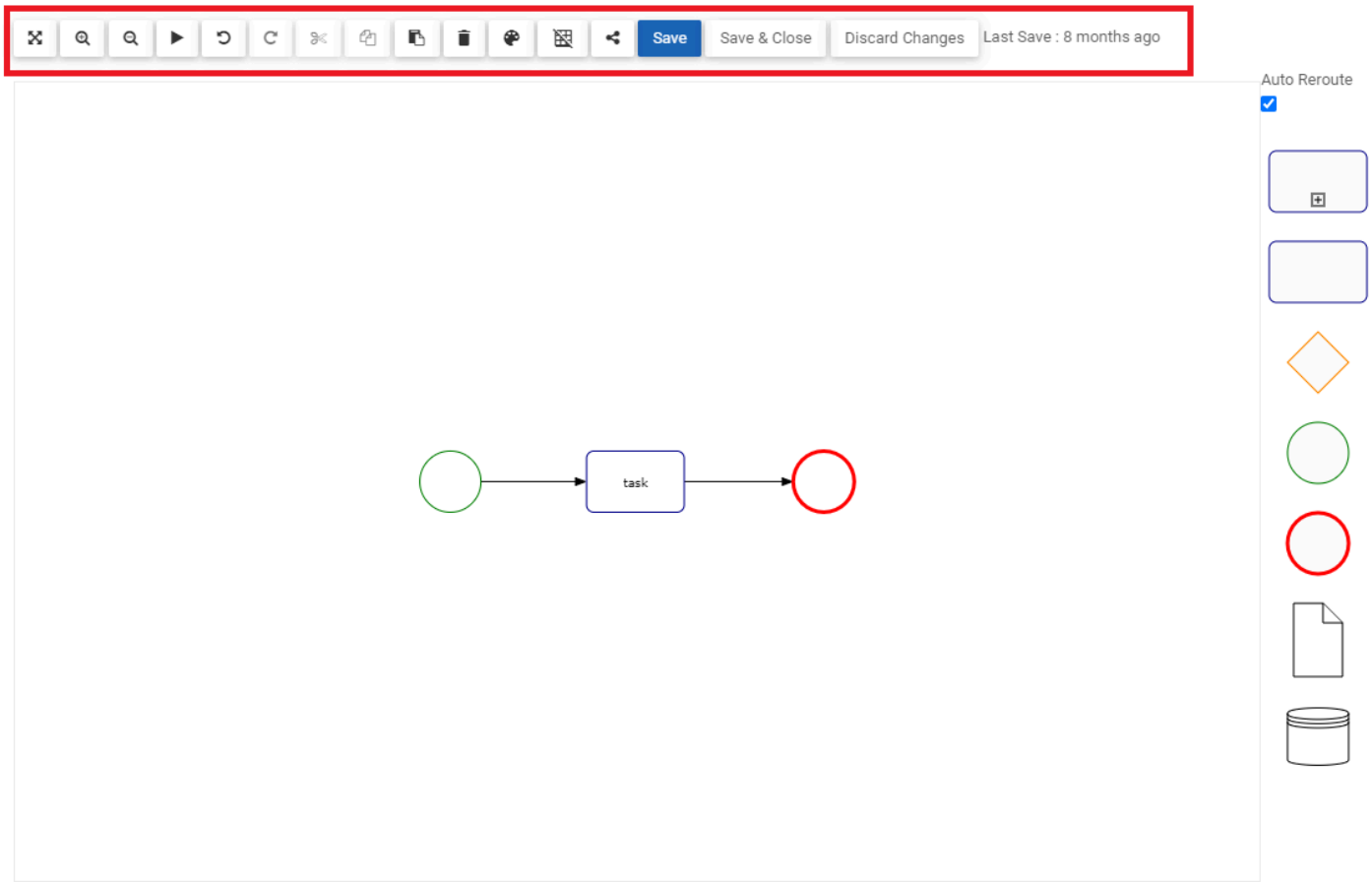


4. The Web Modeler will be redirected to the Full Screen Process Edit


Save
Save & Close
Discard Changes
Last Save : 3 minutes ago
Auto Reroute
2
Create New
Inspection
Instance
3
Check Work
Area
4
Complete
CheckList
6
Enter
Information
in ERP
8
Close
Inspection
Instance
7
Escalate
Safety
Issues
Overview

12.2.2.1.2 Graph Toolbar

The Graph Toolbar focuses on user viewing and on editing graph functionalities helping Web Modelers to map processes.



Please see the table below for a full list of items on the Graph Toolbar and description of each item:

Item	Icon	Description
Cut		Cut shapes from process map
Copy		Copy shapes from process map
Paste		Paste shapes to process map
Delete		Delete shapes from process map
Set Color		Change shapes color

Canvas		Design and rearrange flow object within the limits of a page
Fit Screen		Center the process on the Web Modeler screen
Zoom In		Zoom in to better view a process or item
Zoom Out		Zoom out to better view a process or item
Auto Layout		Re-organize the process flow objects to a computer generated layout
Save	Save	Save the process and continue mapping
Save & Close	Save & Close	Save the process and close edit mode
Discard Changes	Discard Changes	Discard any changes made on the process after the last save and close edit mode
Last Save	Last Save : Time ago	The last time the process was saved

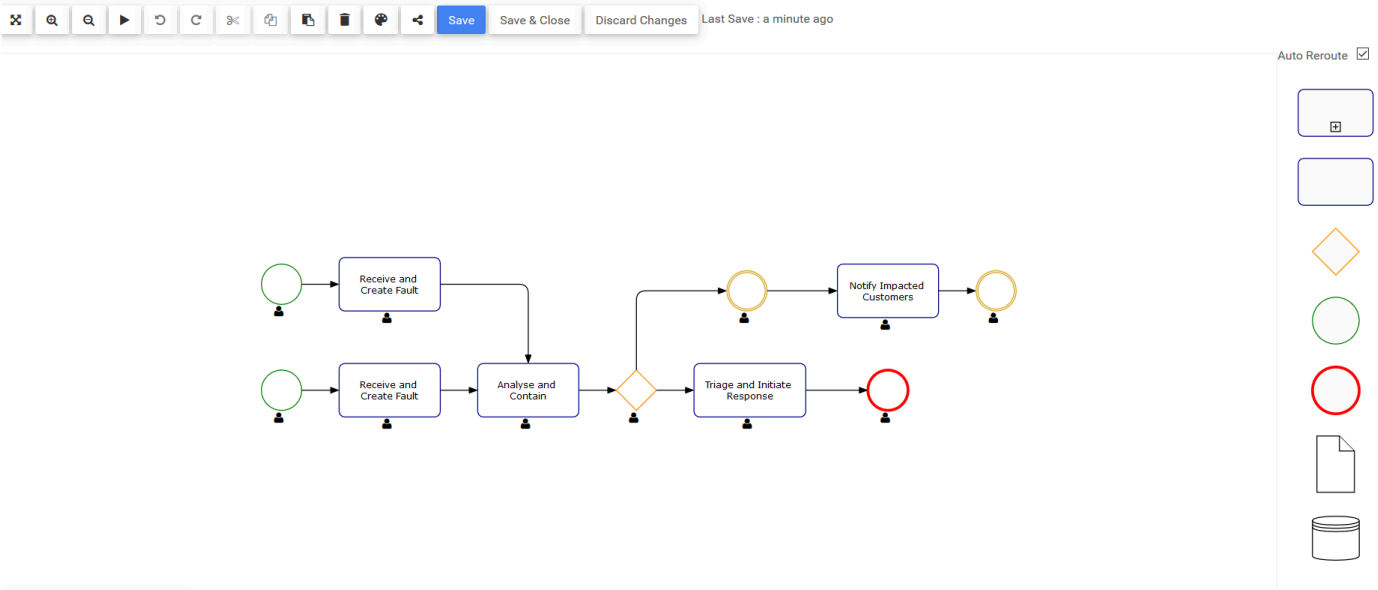
12.2.2.1.2.1 Cut

The Cut function allows Web Modelers to Cut shapes from the process map. The Cut button is located on the toolbar at the top-left of the Edit Screen.

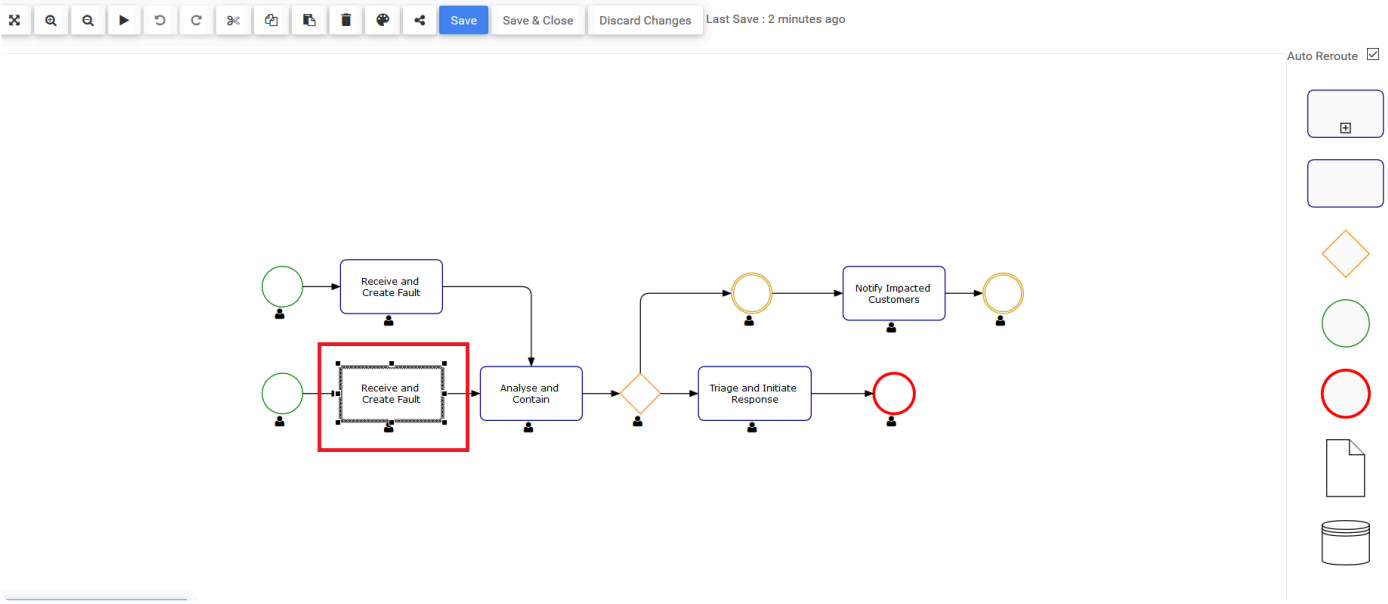
To use the Cut button, please see the following instructions.

> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

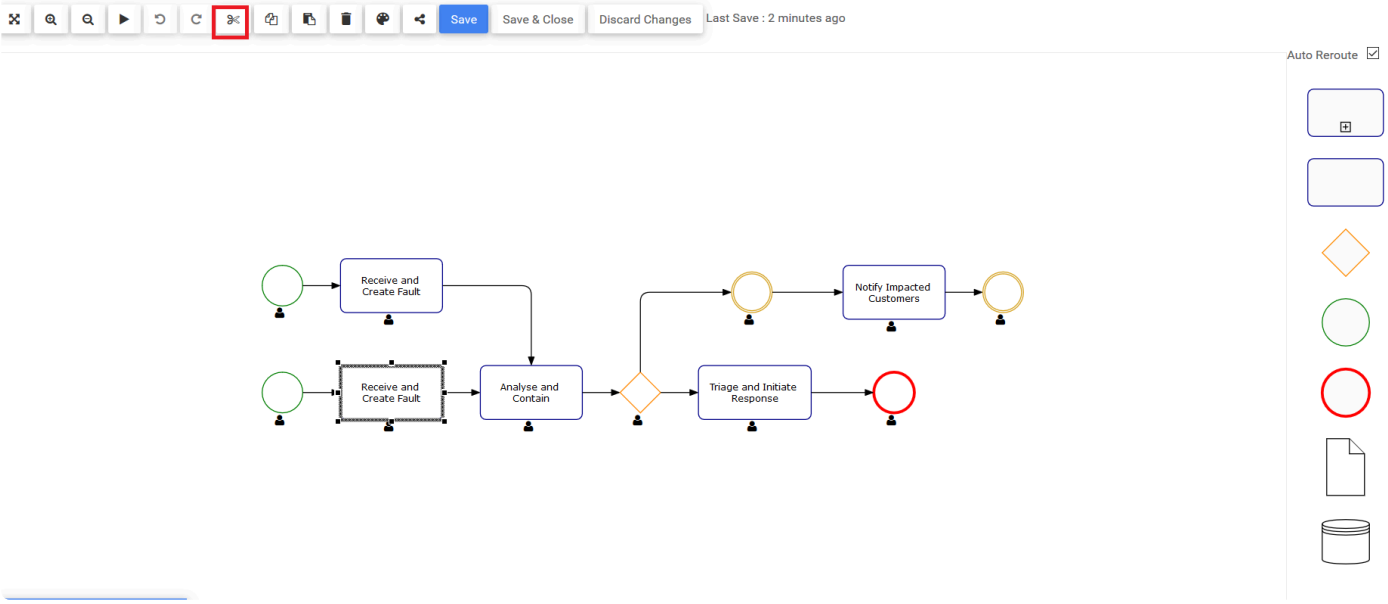
1. Navigate to the Full Screen Edit Mode using the Edit Button



2. Select the shape you want to cut



3. Click on button to cut the shape



Web Modelers can use keyboard shortcut to cut **Ctrl+X**

To cut multiple shapes, see section [Multi-Select Shapes]

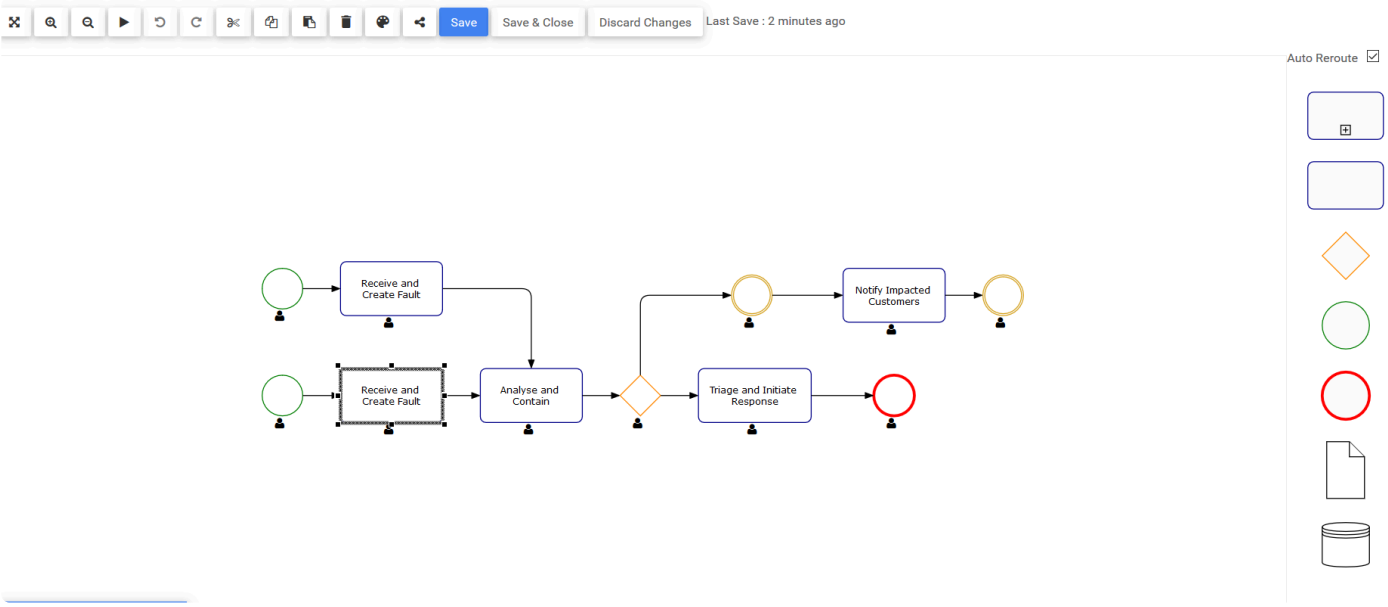
12.2.2.1.2.2 Copy

The Copy function allows Web Modelers to Copy shapes from the process map. The Copy button is located on the toolbar at the top-left of the Edit Screen or by right-clicking on your mouse and selecting the **Copy** option.

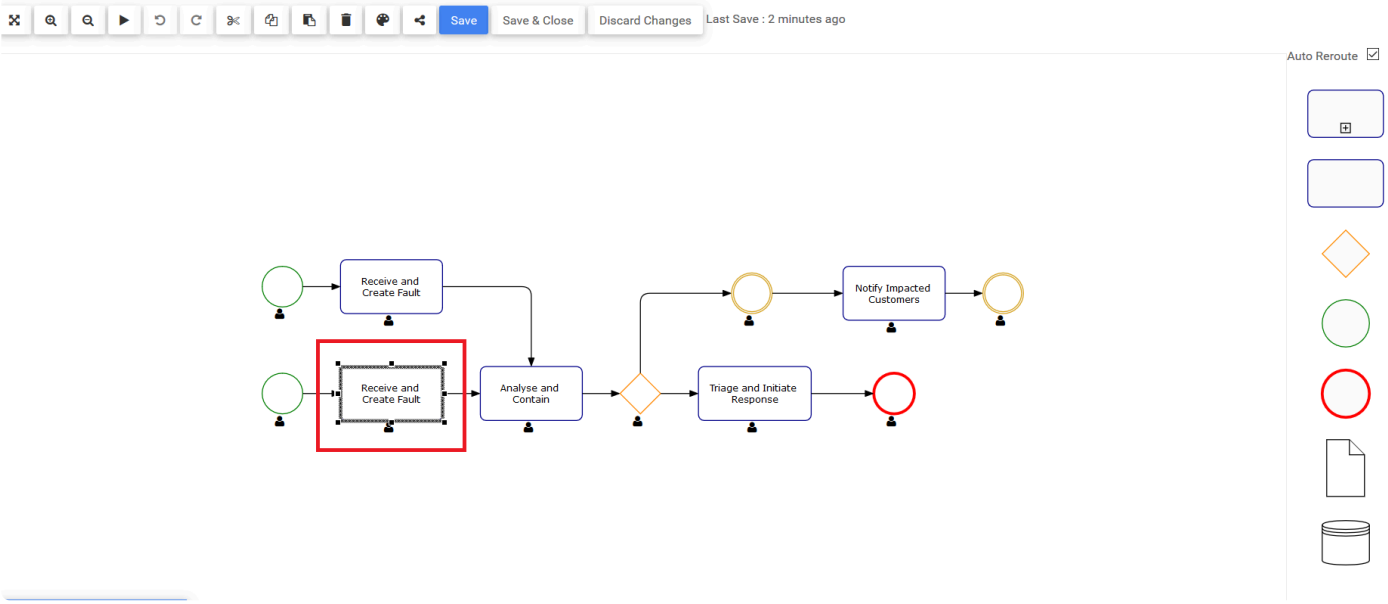
To use the Copy button, please see the following instructions.

> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

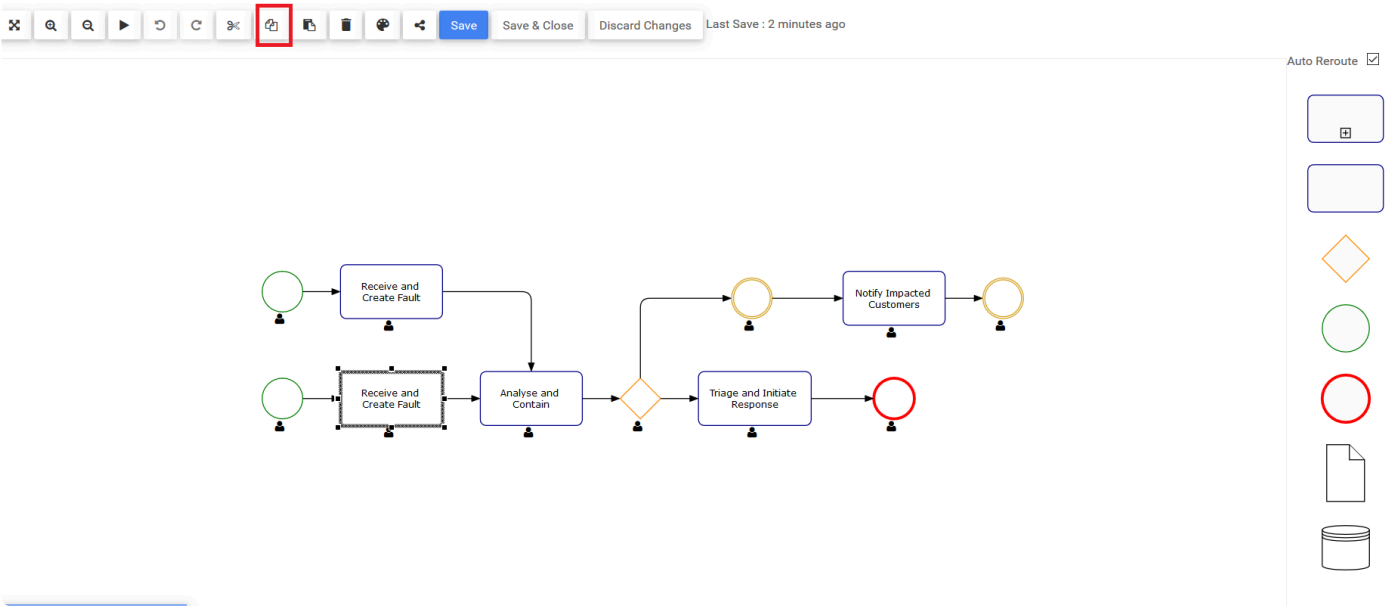
1. Navigate to the Full Screen Edit Mode using the Edit Button



2. Select the shape you want to copy



3. Click on button to copy the shape



> Web Modelers can use keyboard shortcut to copy **Ctrl+C** or right-click with their mouse and select **Copy**

To copy multiple shapes, see section [Multi-Select Shapes]

12.2.2.1.2.3 Paste

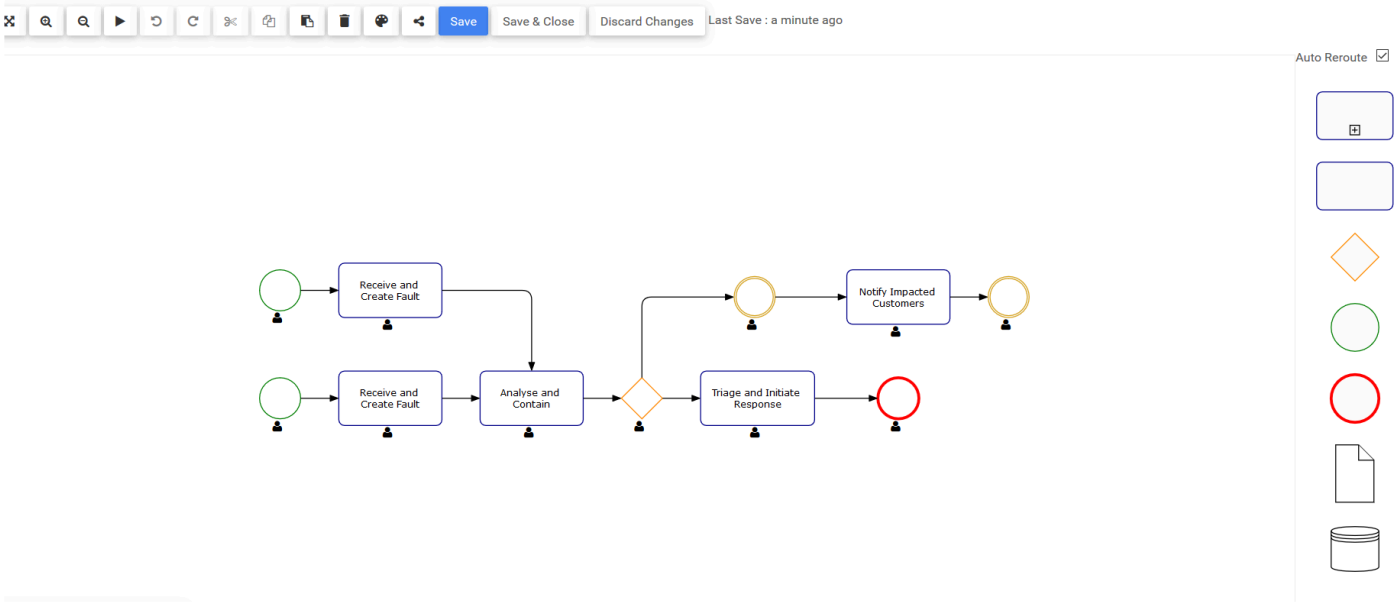
The Paste function allows Web Modelers to Paste shapes they previously copied or cut to the process map.

The Paste button is located on the toolbar at the top-left of the Edit Screen.

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

> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

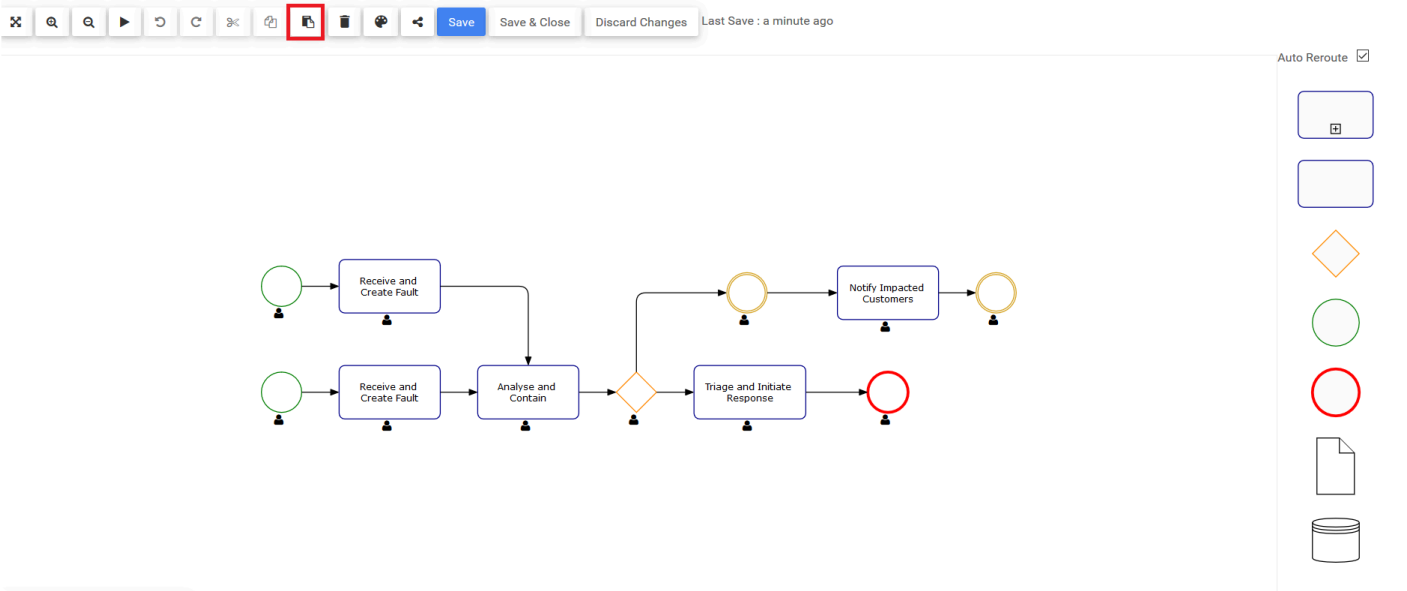
1. Navigate to the Full Screen Edit Mode using the Edit Button



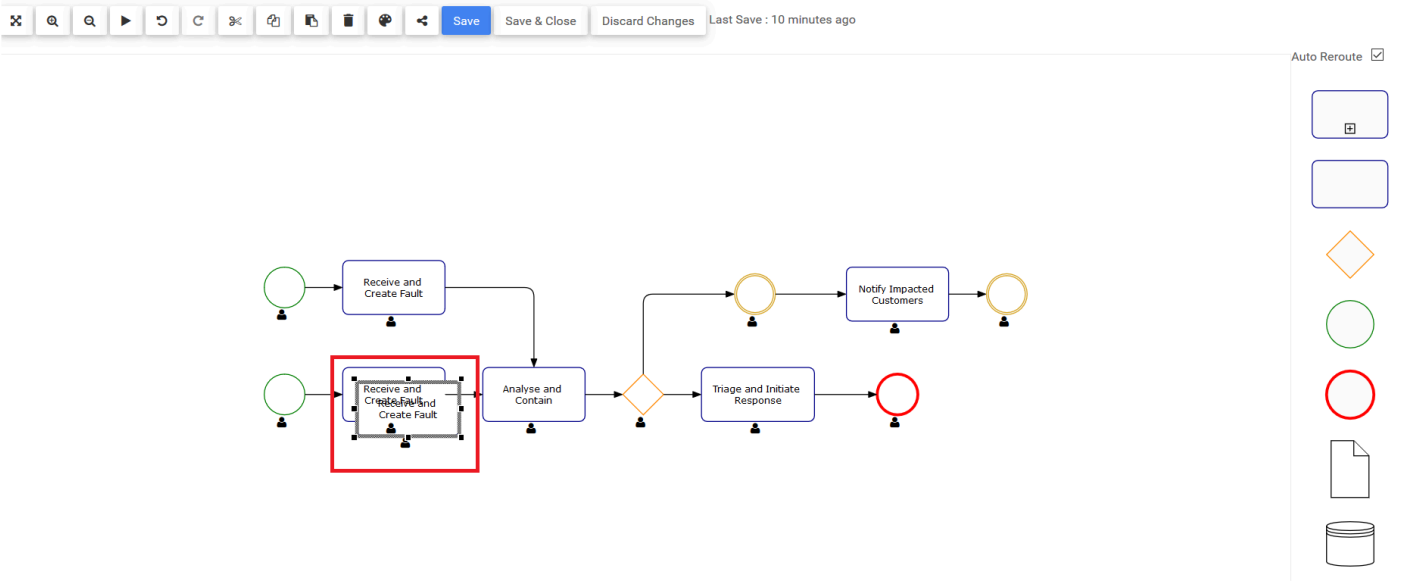
2. Cut or Copy a shape

> The Paste button will be disabled if no shape has been copied or cut.

3. Click on button to paste the shape.



4. The shape will be pasted on the process map.



The shape can be pasted multiple times.

Web Modelers can use keyboard shortcut to paste **Ctrl+V** or by right-clicking and selecting the **Paste** option.

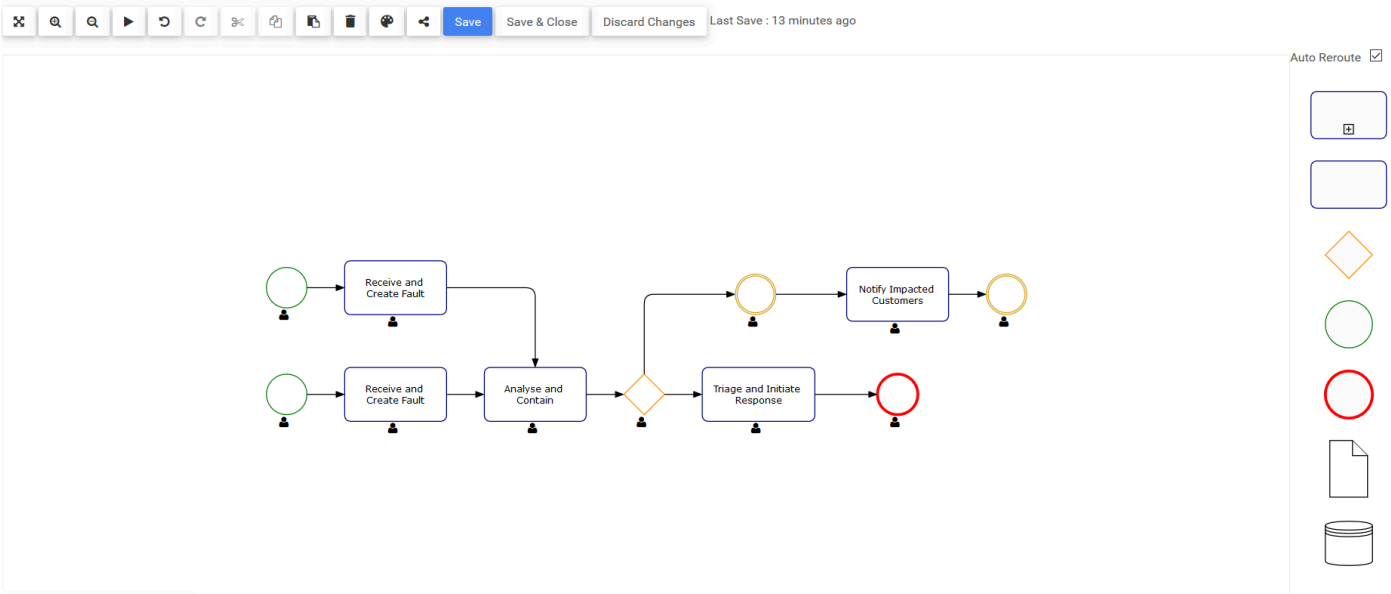
12.2.2.1.2.4 Delete

The Delete function allows Web Modelers to Delete shapes from the process map. The Delete button is located on the toolbar at the top-left of the Edit Screen.

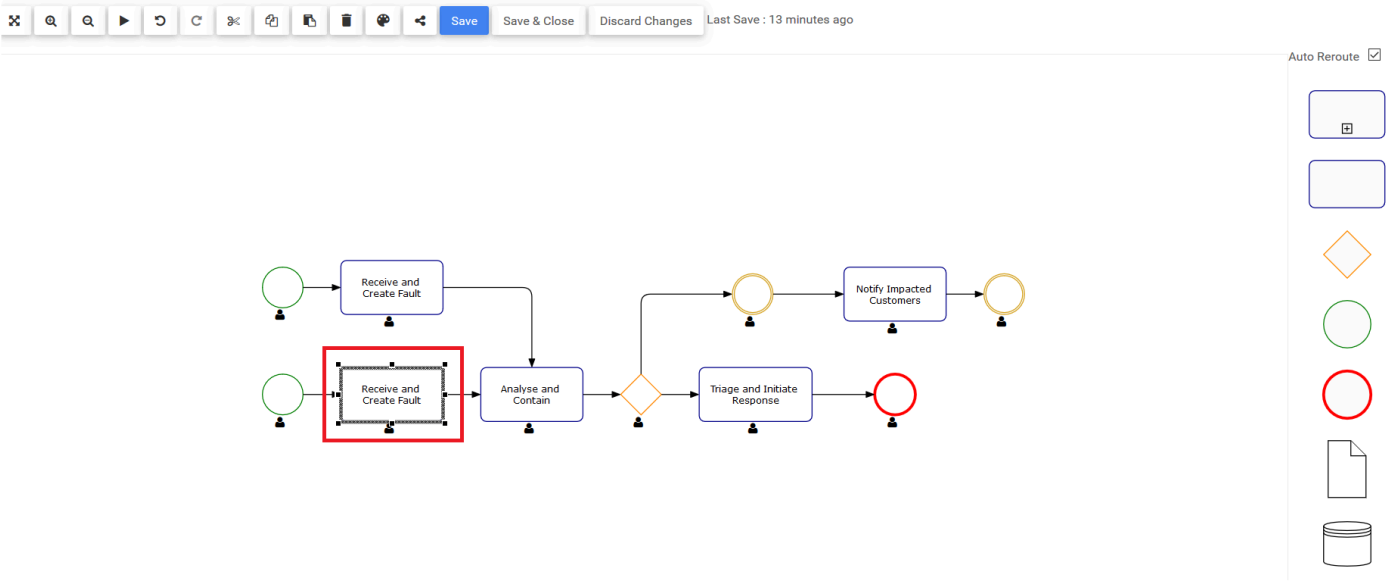
To use the Delete button, please see the following instructions.

> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

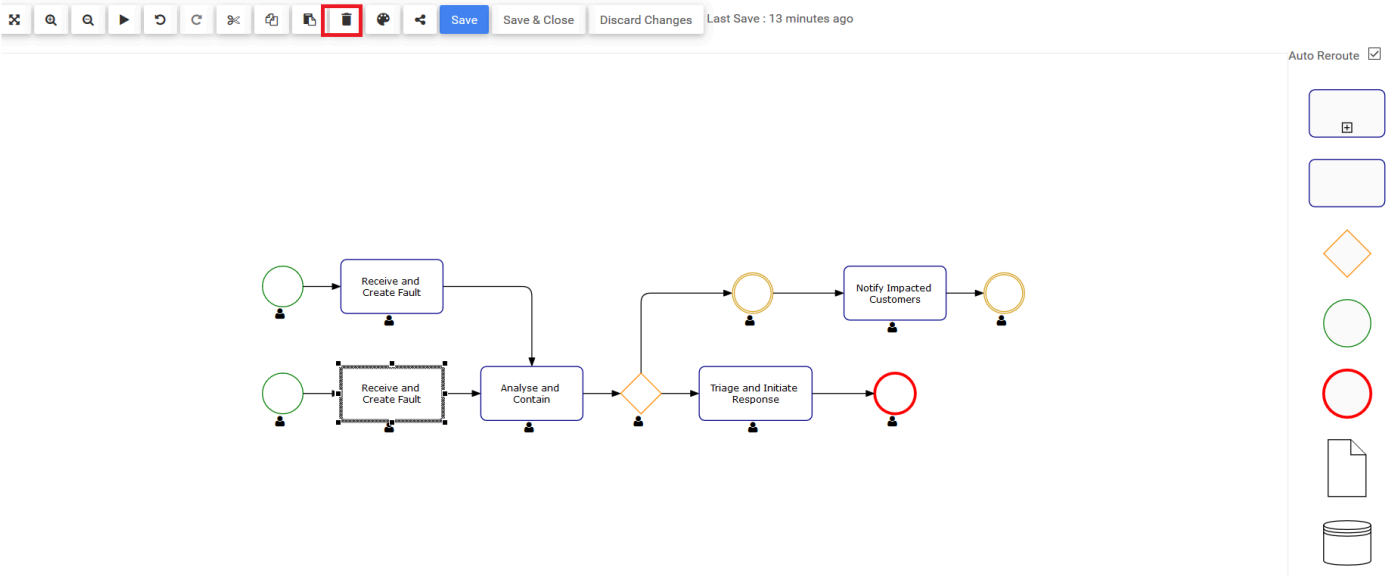
1. Navigate to the Full Screen Edit Mode using the Edit Button



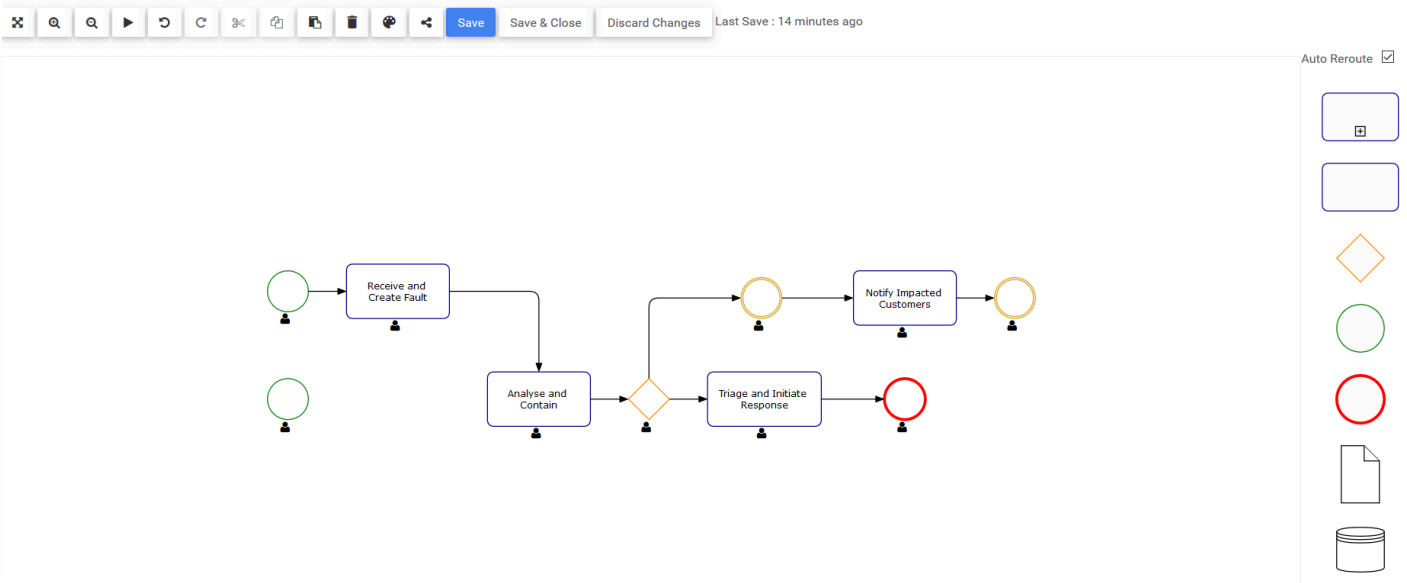
2. Select the shape you want to delete



3. Click on button to delete the shape



4. The shape was removed from the process map



Web Modelers can use the “Delete” key on keyboard to delete objects

If you unwillingly deleted a flow object and want to revert the changes since the last save, click “Cancel”.

To delete multiple shapes, see section Multi-Select Shapes

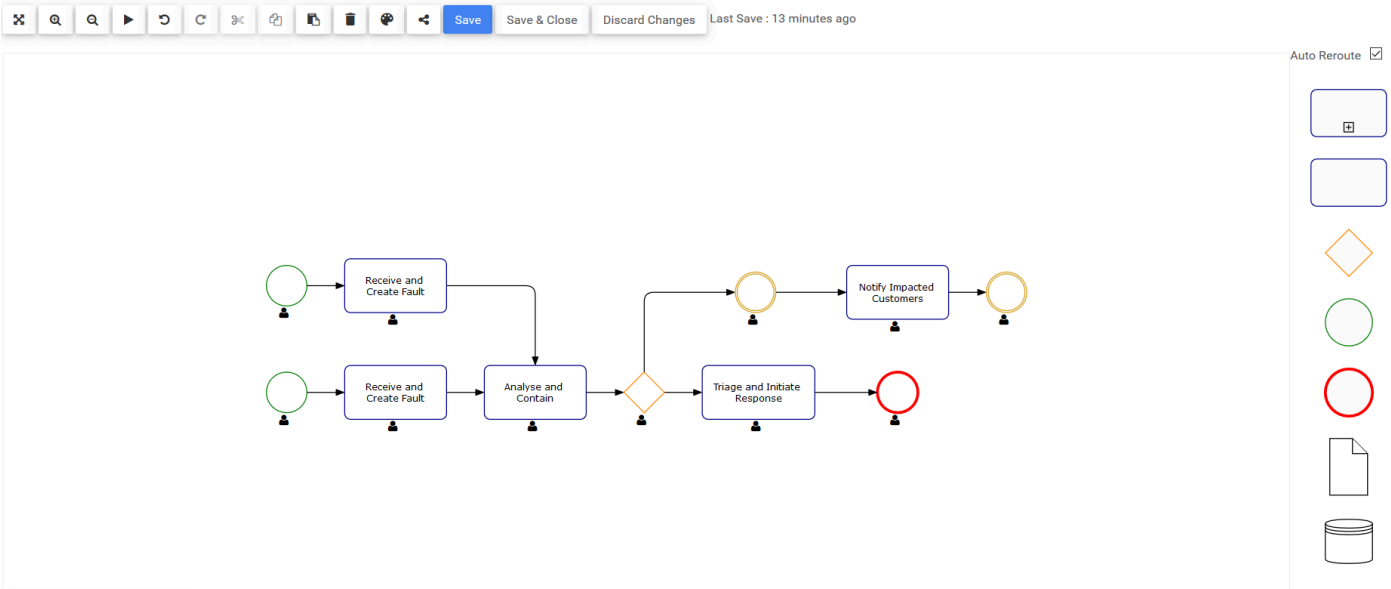
12.2.2.1.2.5 Fit Screen

The Fit Screen function has been implemented to assist Web Modelers at centering the selected process on the Edit screen. The Fit Screen can be accessed when Web Modelers go on Edit Mode. The Fit Screen button is located on the toolbar at the top-left of the Edit Screen.

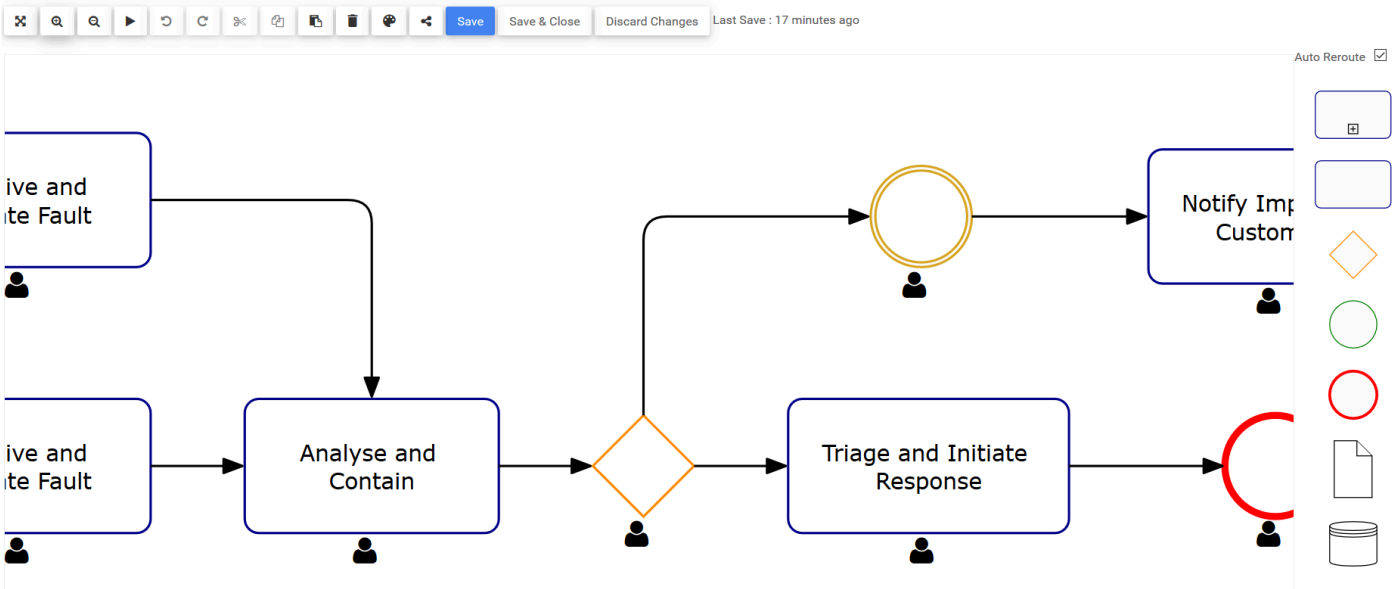
To use the fit screen button, please see the following instructions.

> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

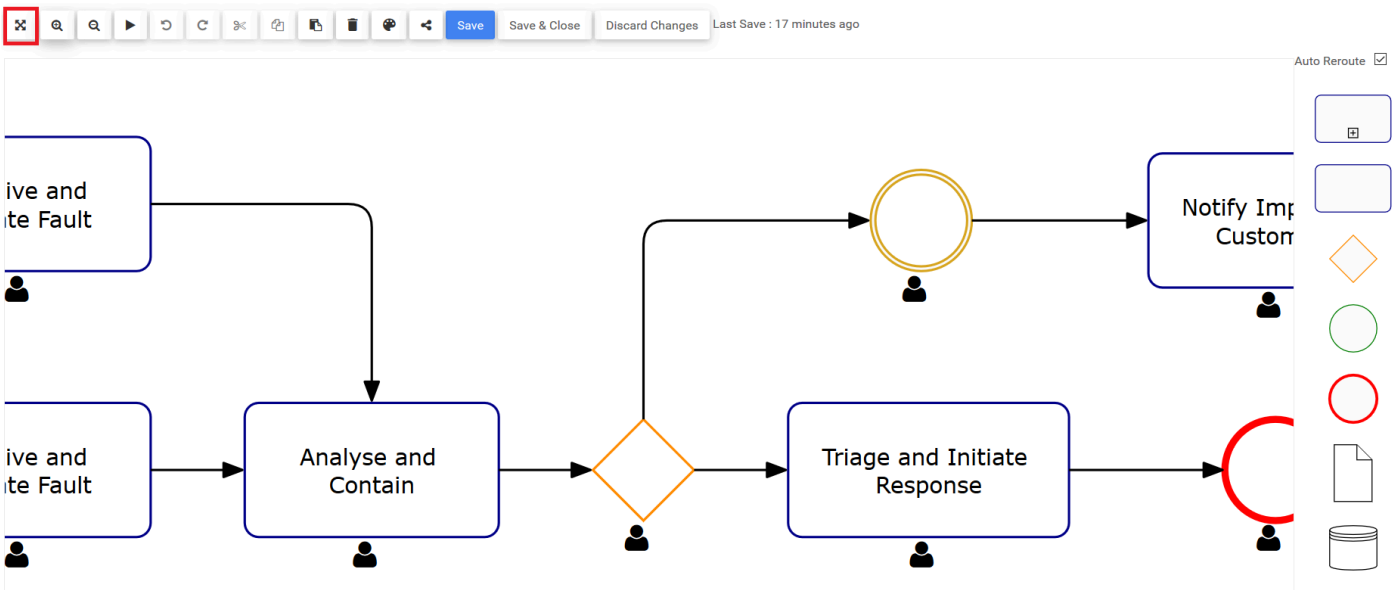
1. Navigate to the Full Screen Edit Mode using the Edit Button



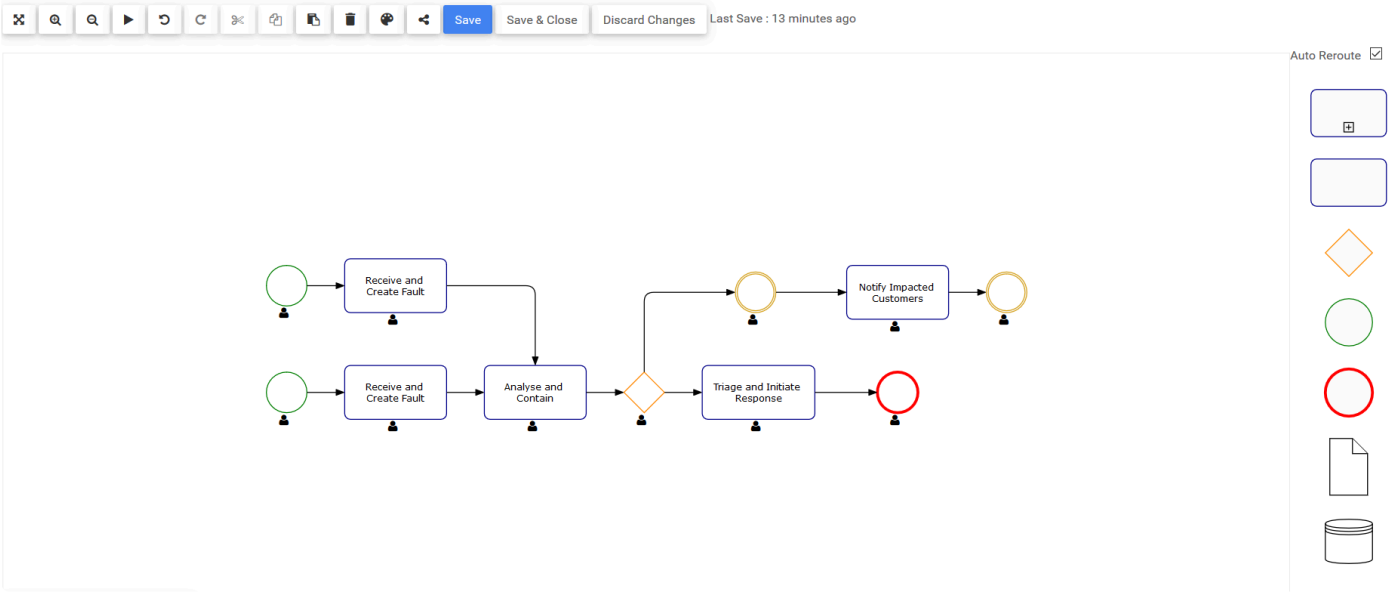
2. Alter the Graph (Zoom in, out or shift). Please see zoom in instructions below for further details.



3. Click on button to re-center the process



4. The process map will be re-centered on the Edit Screen


Save
Save & Close
Discard Changes
Last Save : 13 minutes ago
Auto Reroute
Receive and Create Fault
Receive and Create Fault
Analyse and Contain
Triage and Initiate Response
Notify Impacted Customers

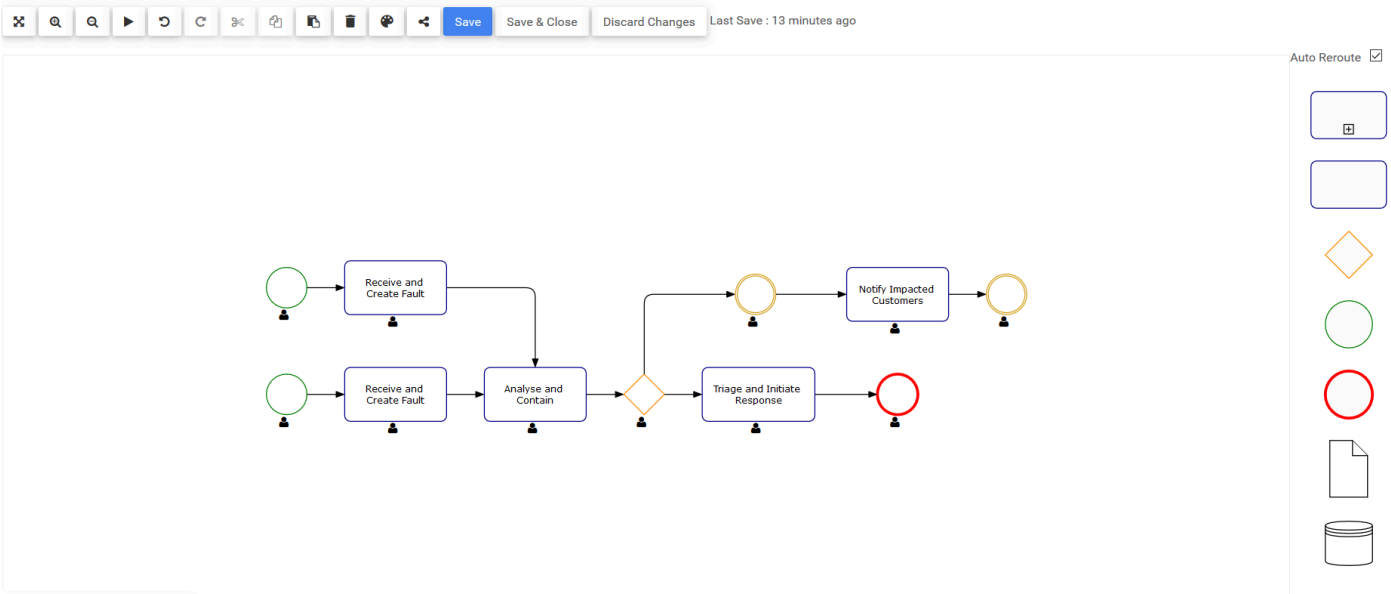
12.2.2.1.2.6 Zoom In

The Zoom In function has been implemented to assist Web Modelers to zoom in into specific items and get a better view of the process on the Edit Screen. The Zoom In button can be accessed when Web Modelers go on Edit Mode. The Zoom In button is located on the toolbar at the top-left of the Edit Screen.

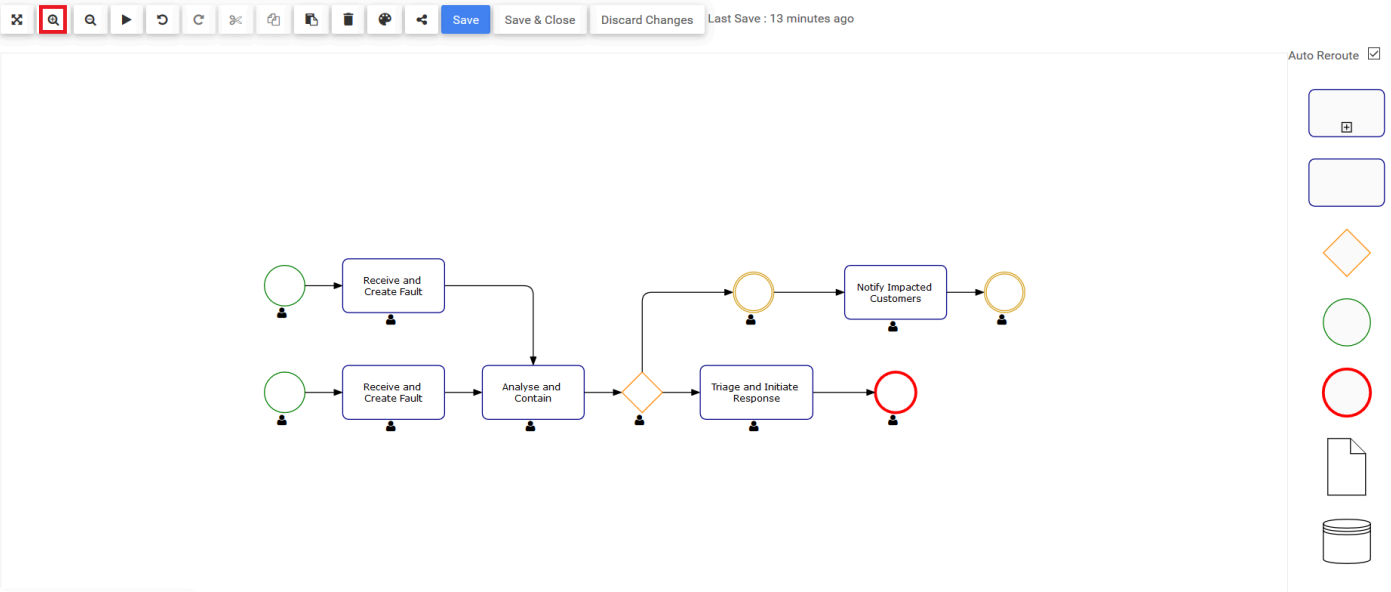
To use the Zoom In button, please see the following instructions.

> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

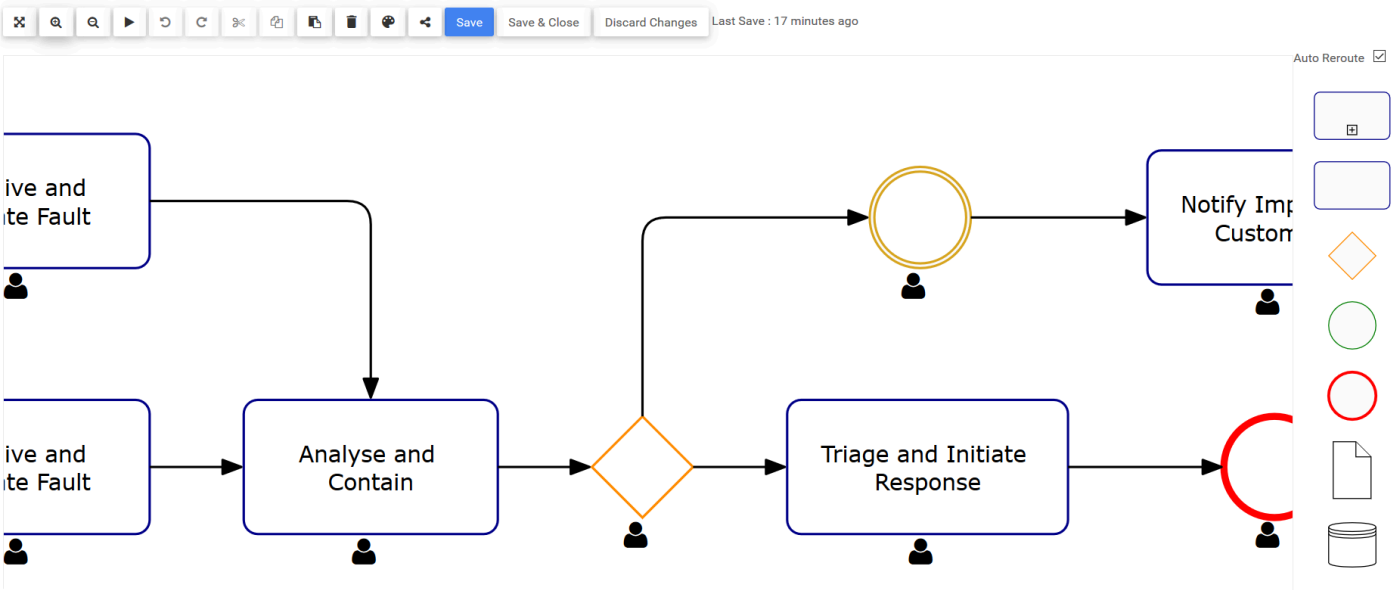
1. Navigate to the Full Screen Edit Mode using the Edit Button



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



3. Click on button until reaching desired Zoom



Web Modelers can use the Zoom Out or Fit Screen functions to bring back process map to normal size

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

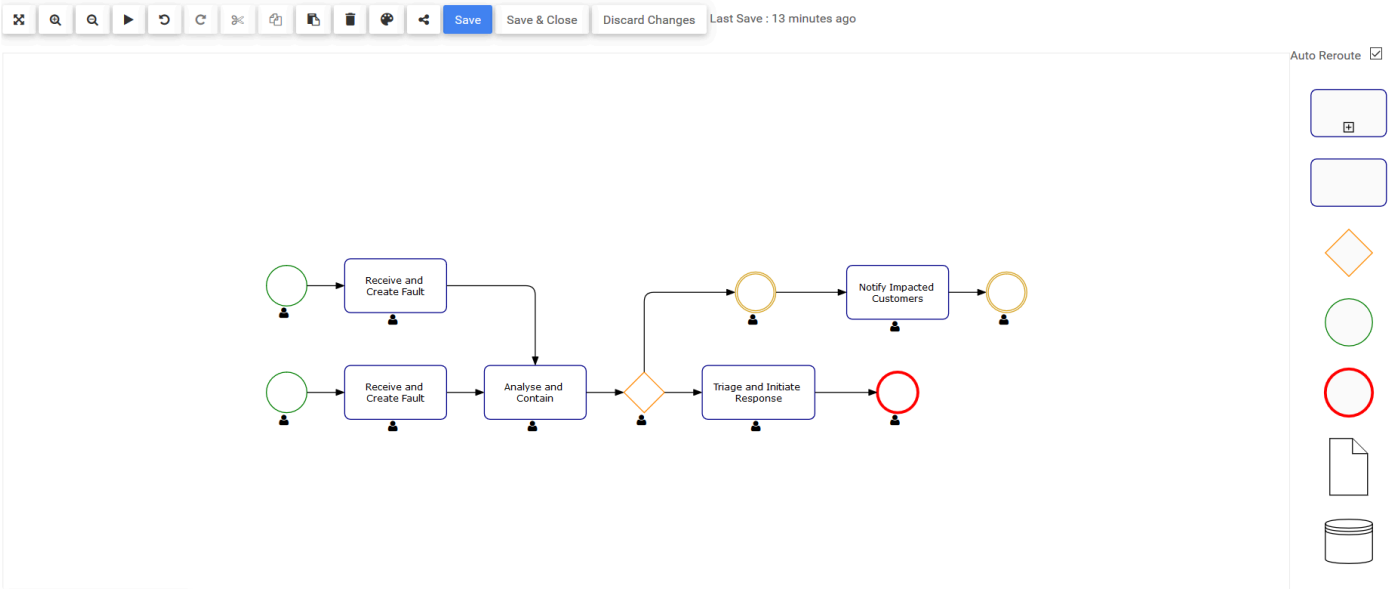
12.2.2.1.2.7 Zoom Out

The Zoom Out function has been implemented to assist Web Modelers to zoom out to get a better view of the process on the Edit Screen. The Zoom Out button can be accessed when Web Modelers go on Edit Mode. The Zoom Out button is located on the toolbar at the top-left of the Edit Screen.

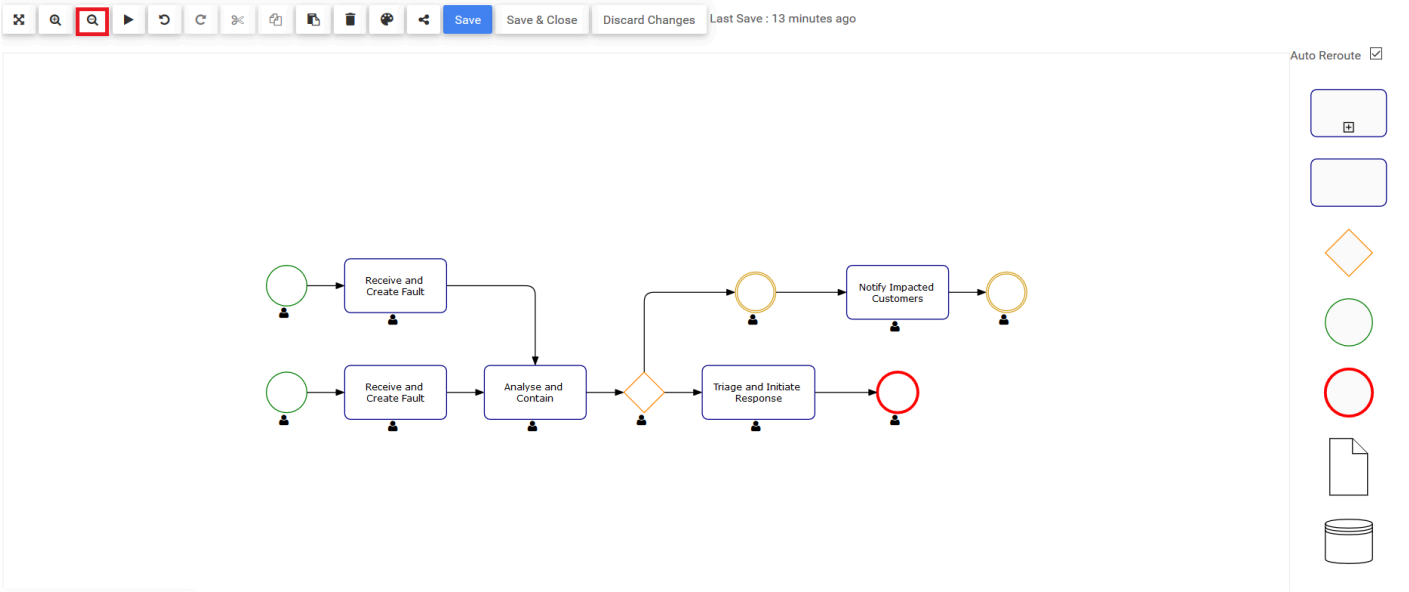
To use the Zoom Out button, please see the following instructions.

> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

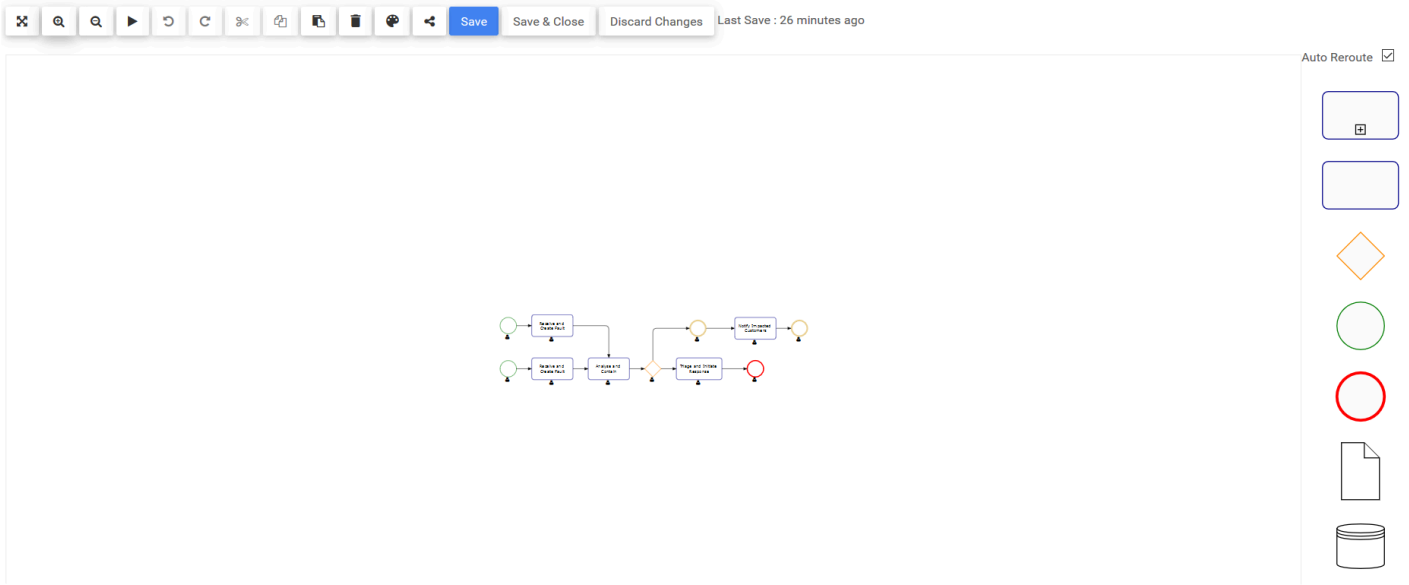
1. Navigate to the Full Screen Edit Mode using the Edit Button



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



3. Click on button until reaching desired Zoom



Web Modelers can use the Zoom In or Fit Screen functions to bring back process map to normal size

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

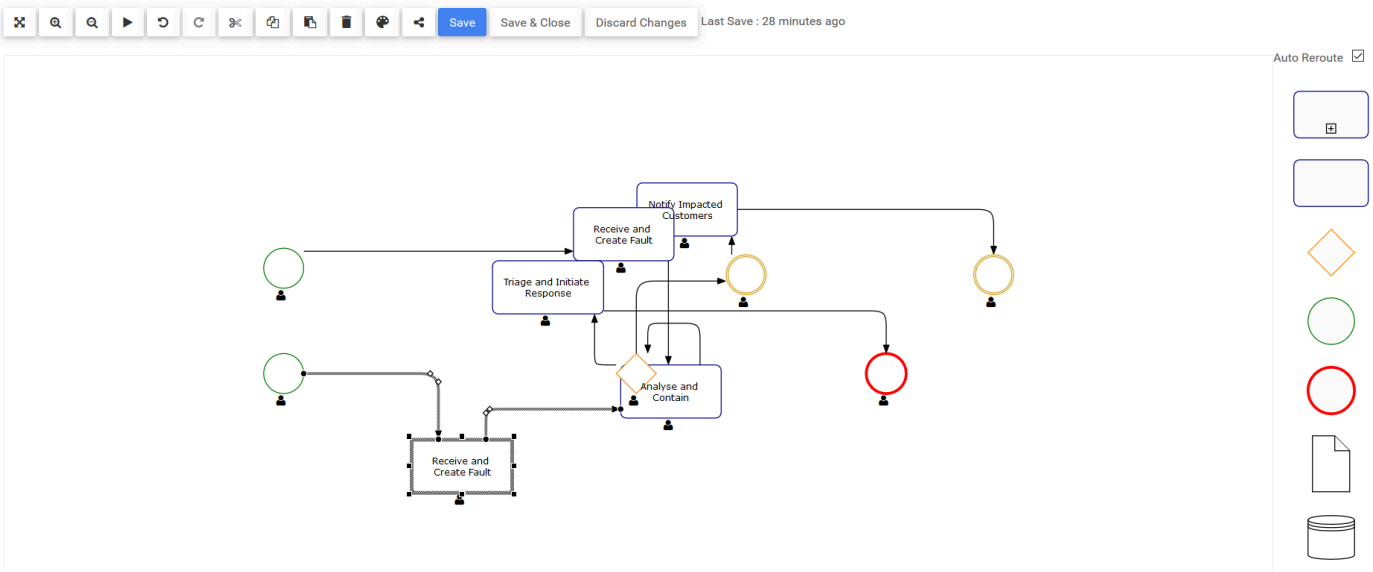
12.2.2.1.2.8 Auto Layout

The Auto Layout function has been added to optimize process layout after Web Modeler 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. The Auto Layout button can be accessed when Web Modelers go on Edit Mode. The Auto Layout button is located on the toolbar at the top-left of the Edit Screen.

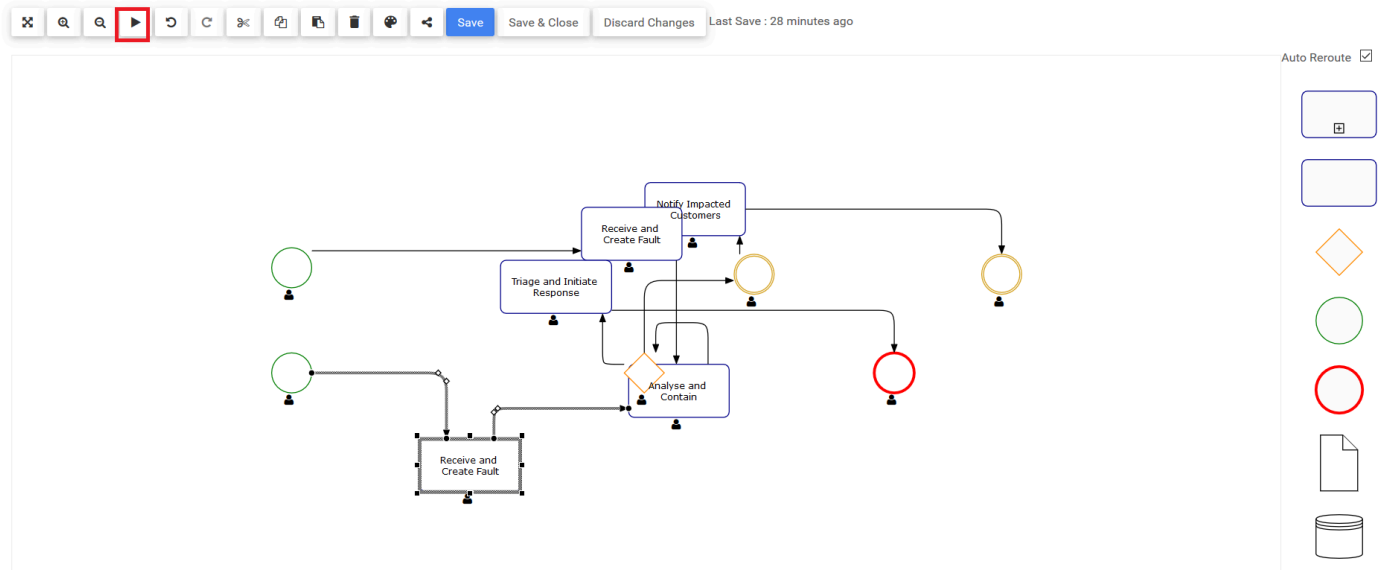
To use the Auto Layout button, please see the following instructions.

> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

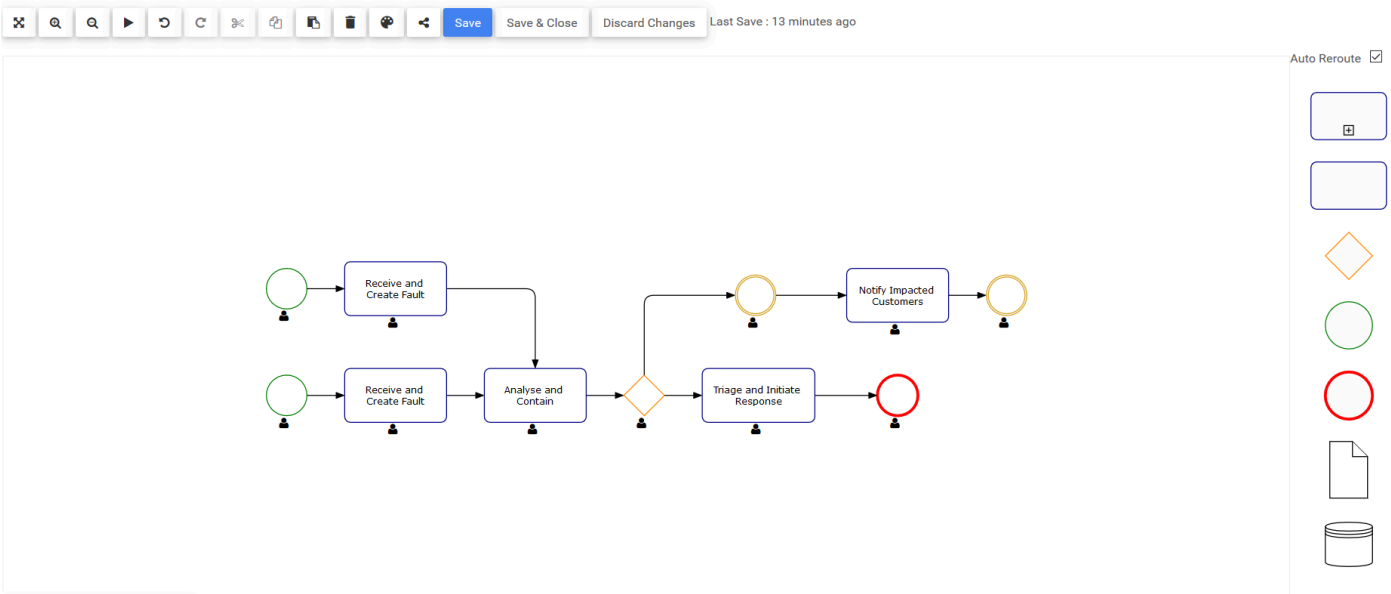
1. Navigate to the Full Screen Edit Mode using the Edit Button



2. Select Auto Layout button at the upper left corner of the page to optimize the layout



3. The layout will be reset



12.2.2.1.2.9 Save

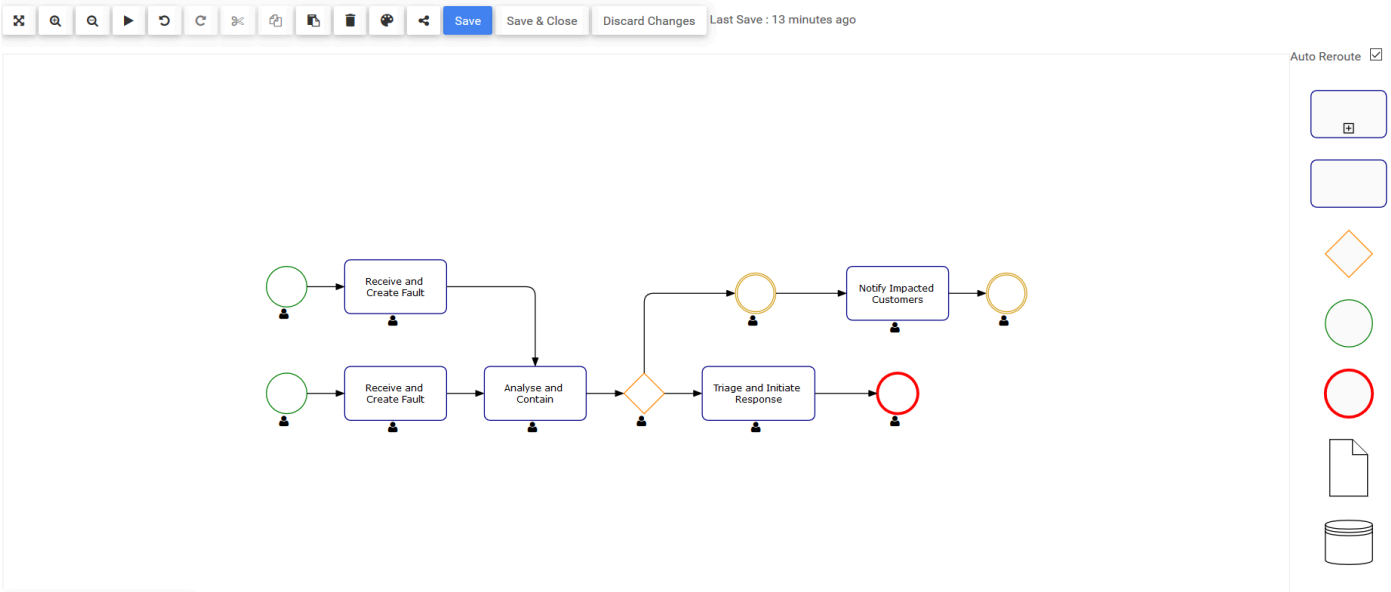
The Save function allows Web Modelers to save the process mapped and keep working on the it. This enables users to save the process and limit the risks of losing their work. The Save button can be accessed when Web Modelers go on Edit Mode. The Save button

is located on the toolbar at the top-left of the Edit Screen.

To Save a Process Map, please see the following instructions.

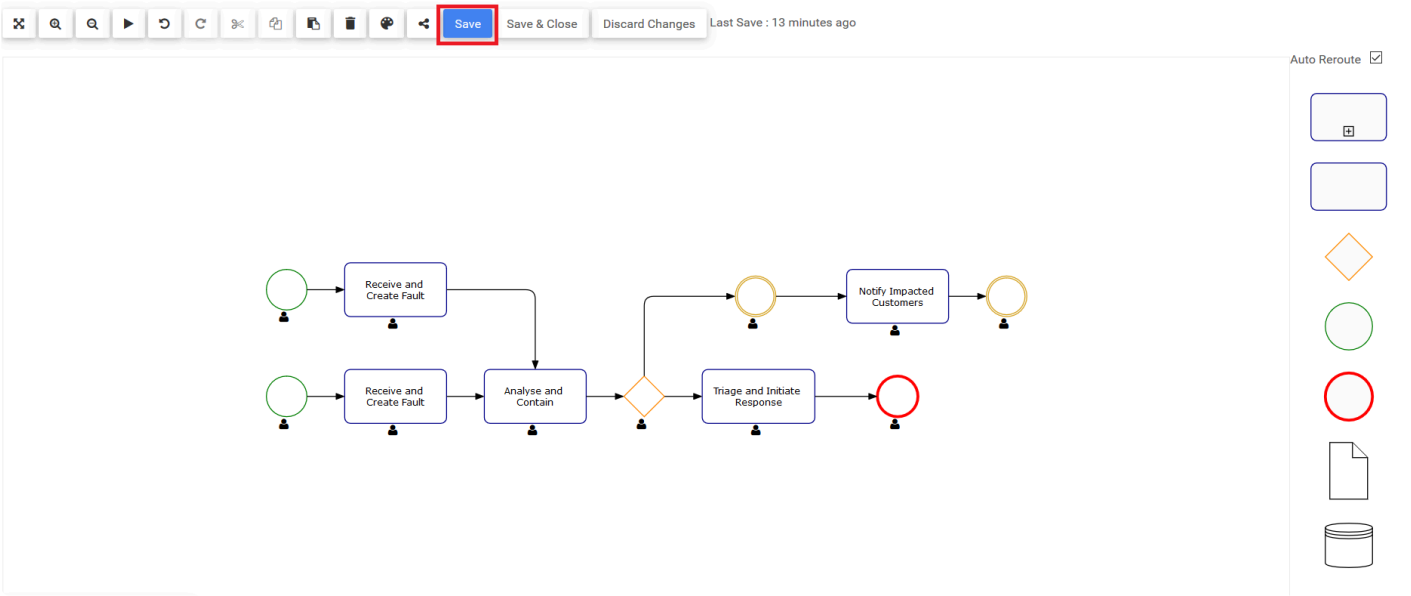
> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

1. Navigate to the Full Screen Edit Mode using the Edit Button

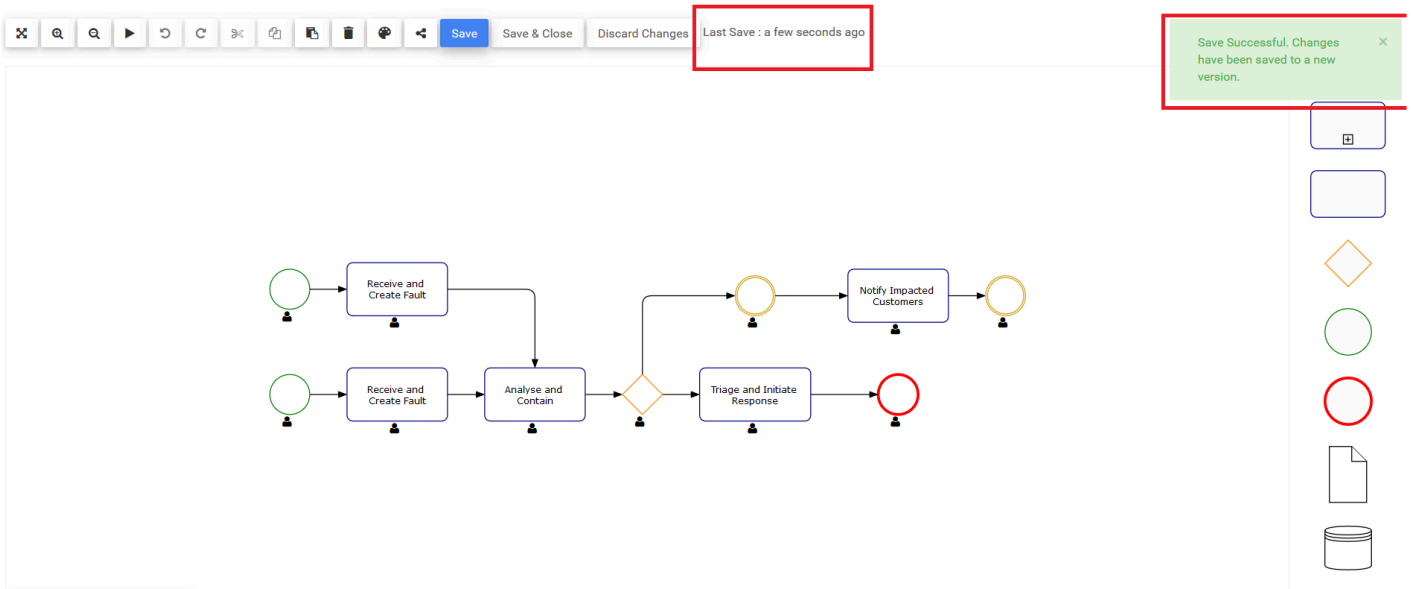


2. Click on button

to save the process map



3. The process map is saved as a draft with a new version. A notification will be generated saying the process map was saved successfully. The Last Save will now be “a few seconds ago.” To learn how to publish Process objects, [click here](#).



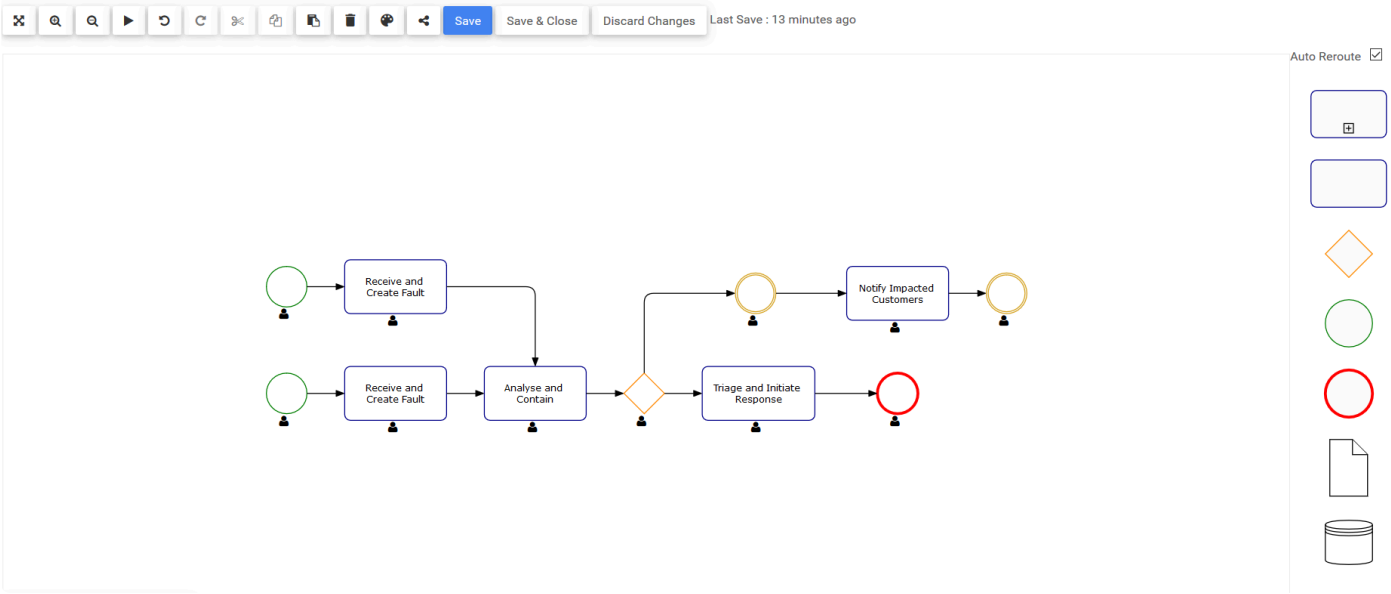
12.2.2.1.2.10 Save & Close

The Save & Close function allows Web Modelers to save the process mapped and leave the Full Screen Edit Mode window. The Save & Close button can be accessed when Web Modelers go on Edit Mode. The Save button Save & Close is located on the toolbar at the top-left of the Edit Screen.

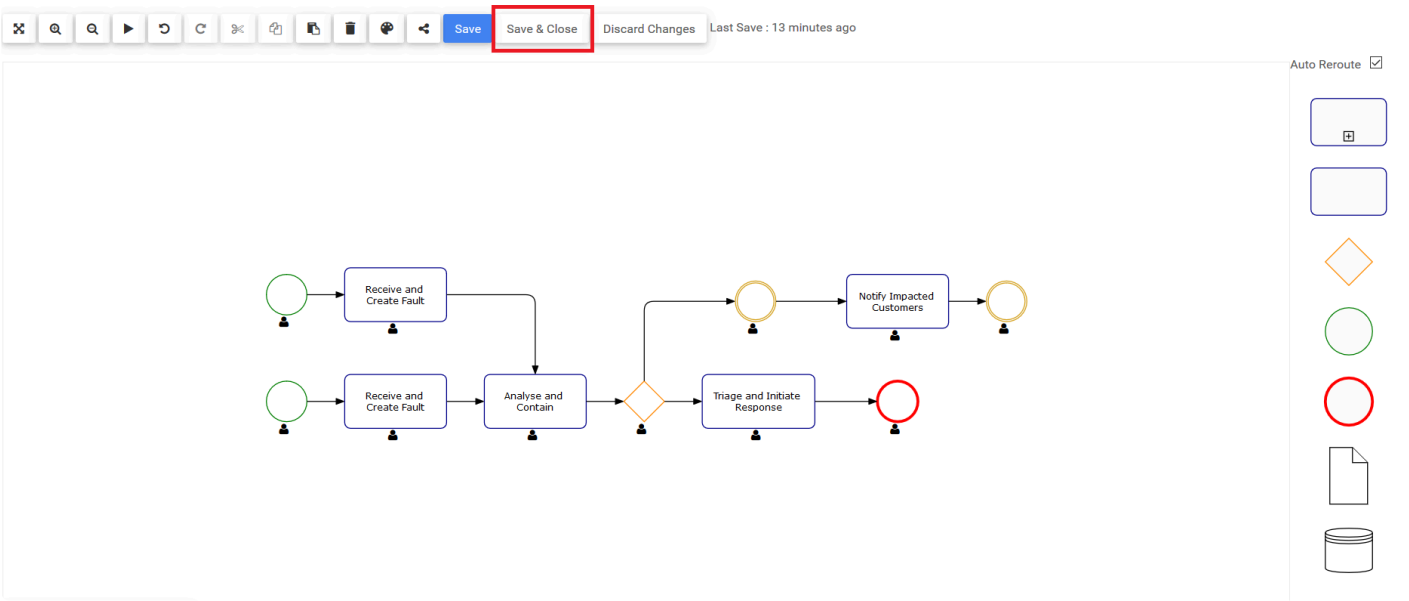
To Save & Close a Process Map, please see the following instructions.

> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

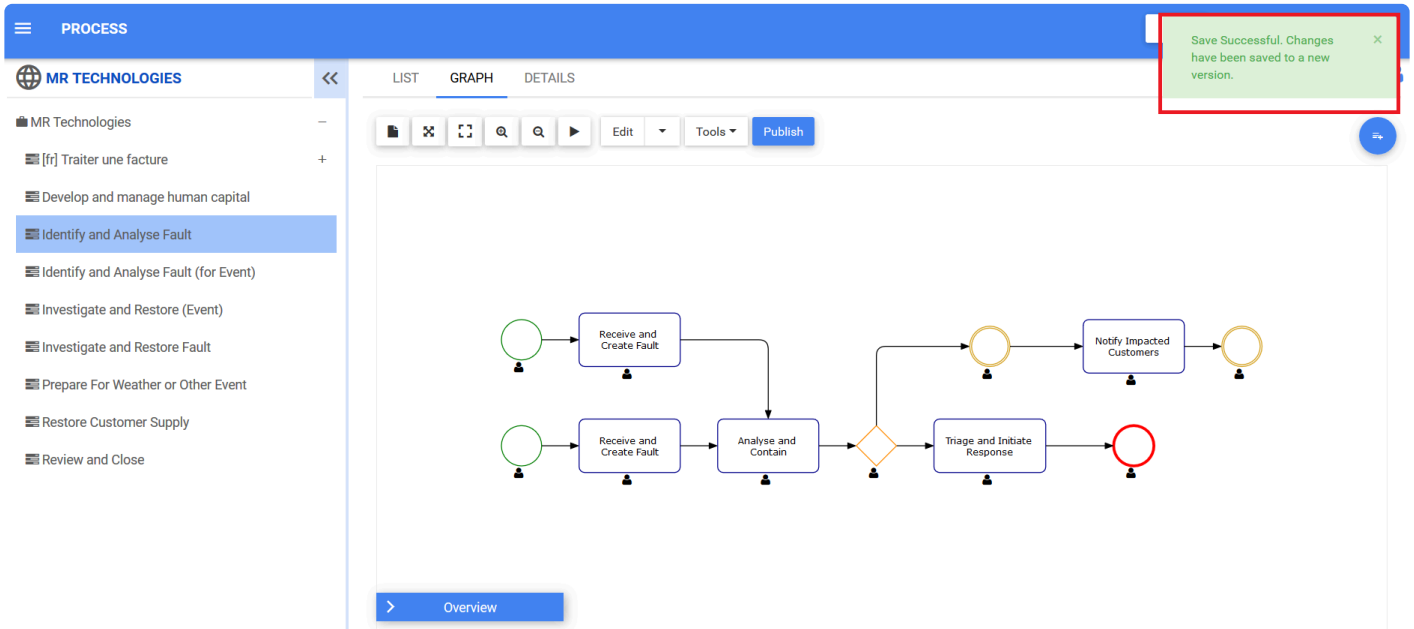
1. Navigate to the Full Screen Edit Mode using the Edit Button



2. Click on button Save & Close to save and close the process map



3. You will be redirected to the process Graph tab. A notification will be generated saying the process map was saved successfully. The process map is saved as a draft with a new version number. To learn how to publish Process objects, click here.



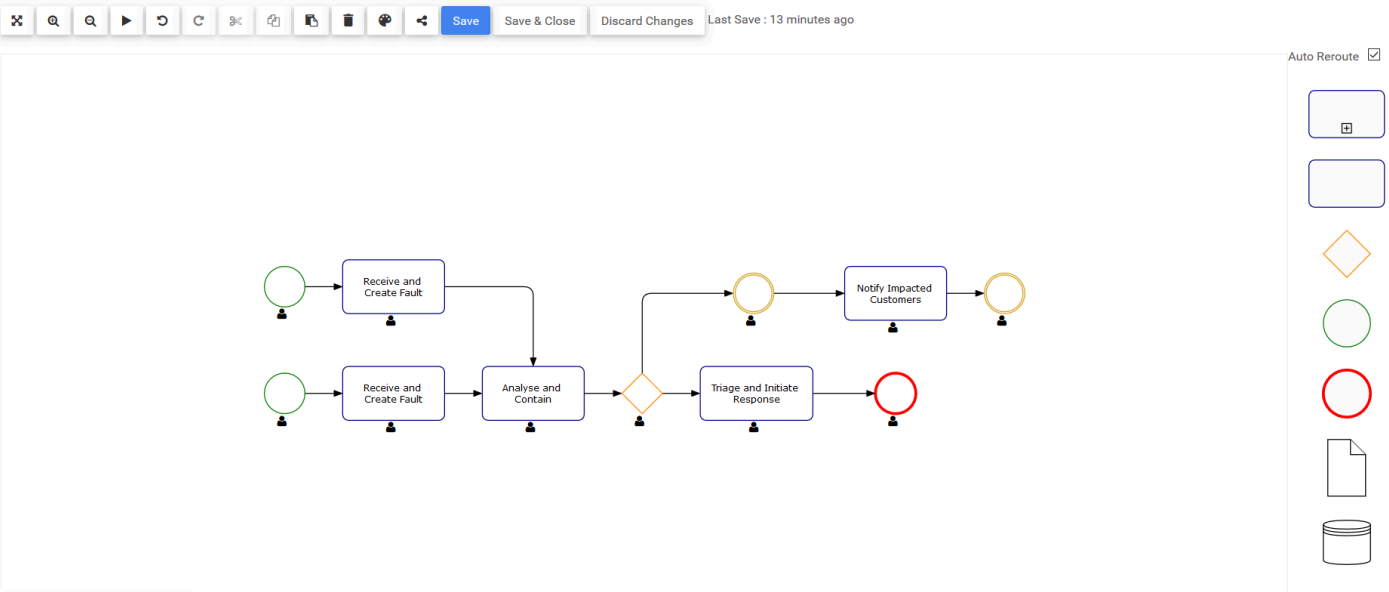
12.2.2.1.2.11 Discard Changes

The Discard Changes function allows Web Modelers to discard any changes made on the process after the last save and close edit mode. The Discard Changes button can be accessed when Web Modelers go on Edit Mode. The Discard Changes button Discard Changes is located on the toolbar at the top-left of the Edit Screen.

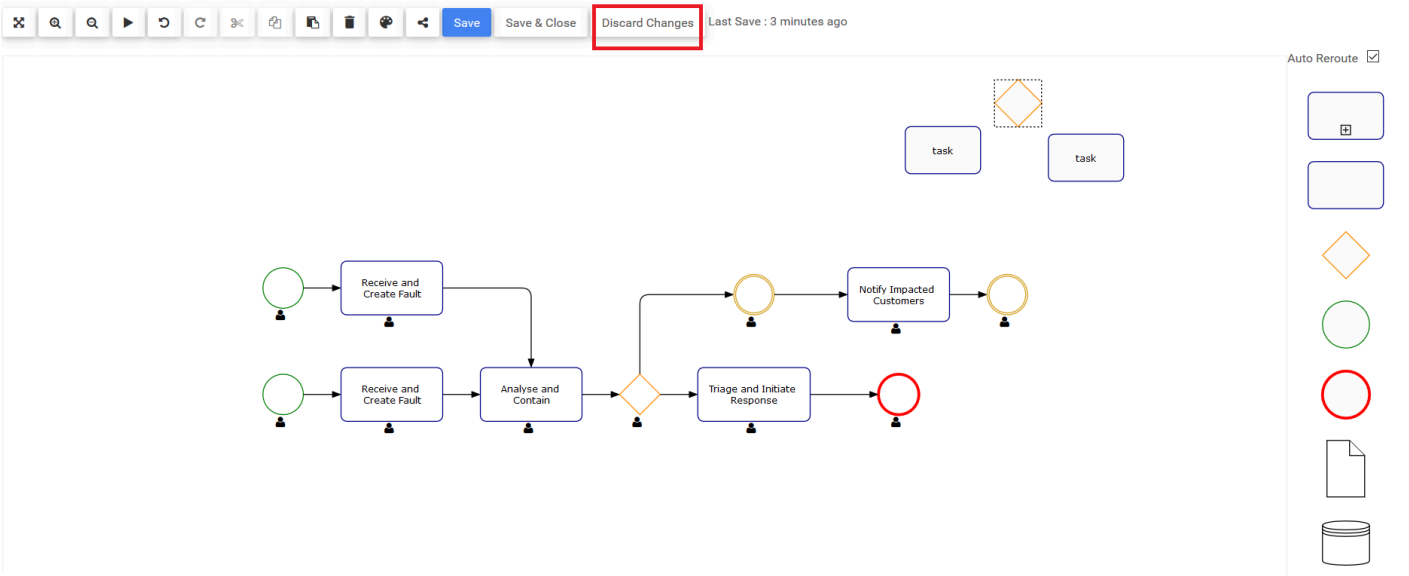
To Discard Changes made on a Process Map, please see the following instructions.

> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

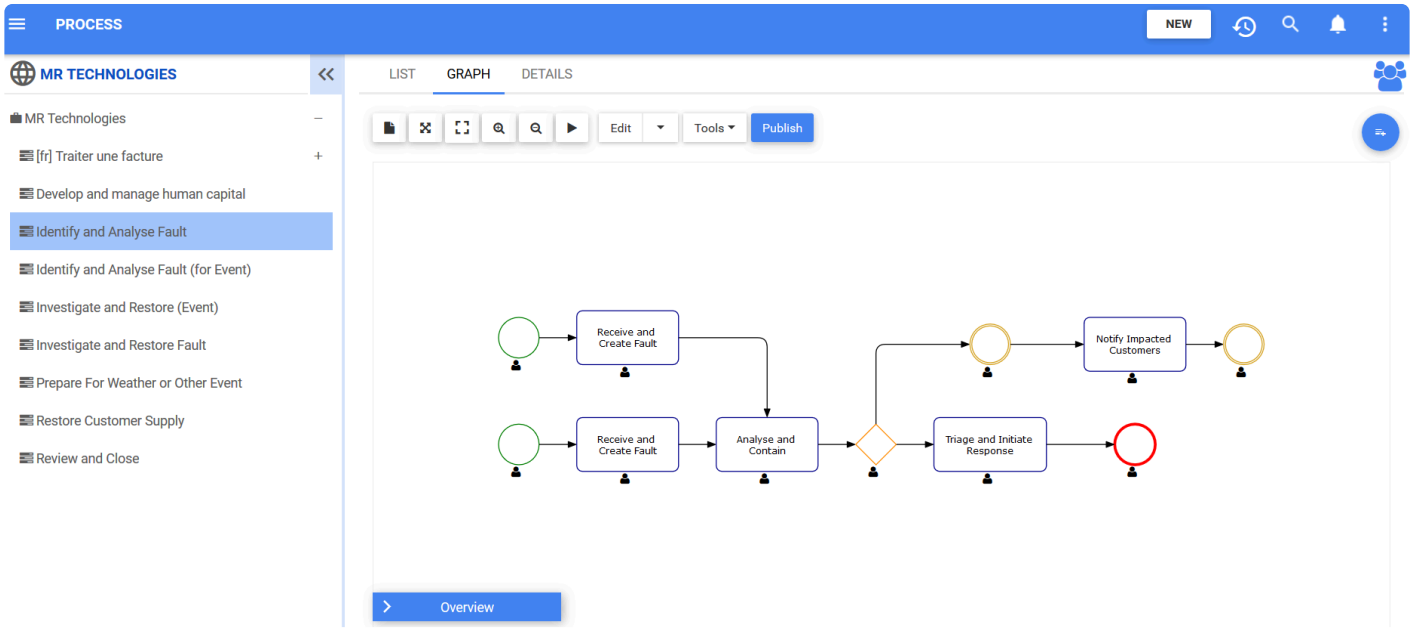
1. Navigate to the Full Screen Edit Mode using the Edit Button and modify the process map



2. Modify the process map, and click on button Discard Changes to discard changes made

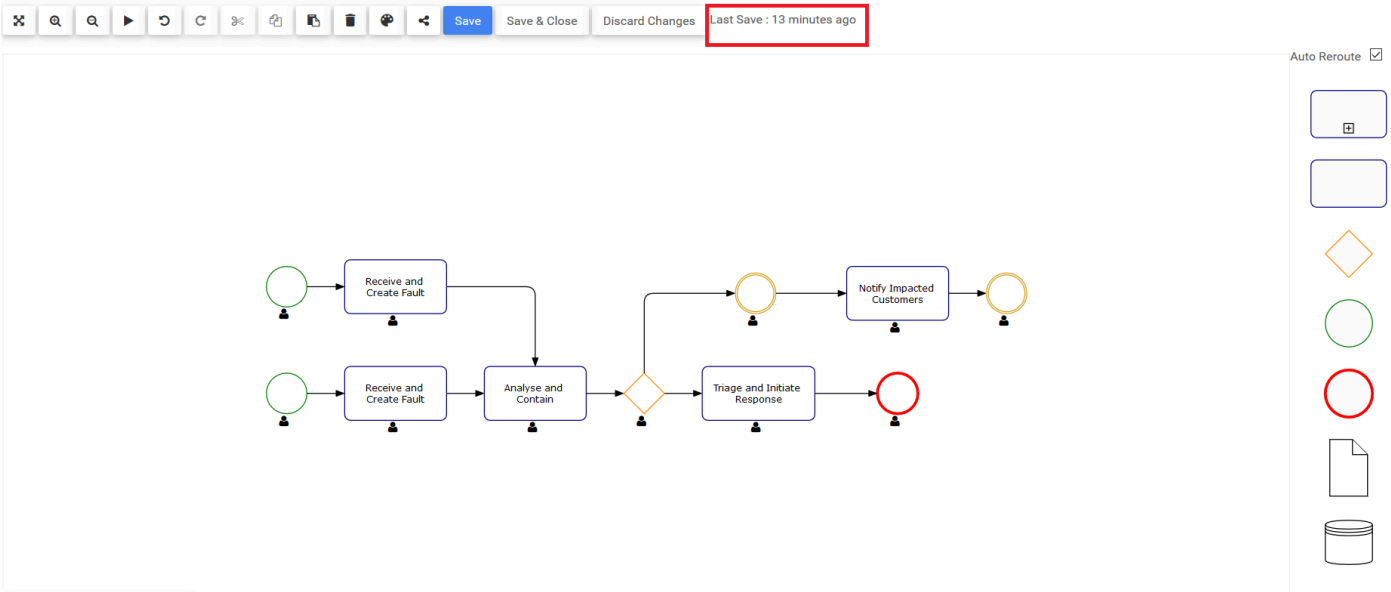


3. The changes made on the process map were not saved. You will view the last version of the map that was saved.



12.2.2.1.2.12 Last Save

Since you can save multiple times during an editing session, the **Last Save** serves to display when the latest version of this object was saved.



12.2.2.1.2.13 Undo

12.2.2.1.2.14 Redo

12.2.2.1.2.15 Text

The Text function allows Web Modelers to add a text annotation at the bottom of the process map. The Text button ICON IMAGE is located at the bottom left of the edit box.

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

> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

1. Navigate to the Full Screen Edit Mode using the Edit Button
   IMAGE
2. Select the Text icon at the bottom left of the Edit box.
   IMAGE
3. Type additional information necessary and click Save.

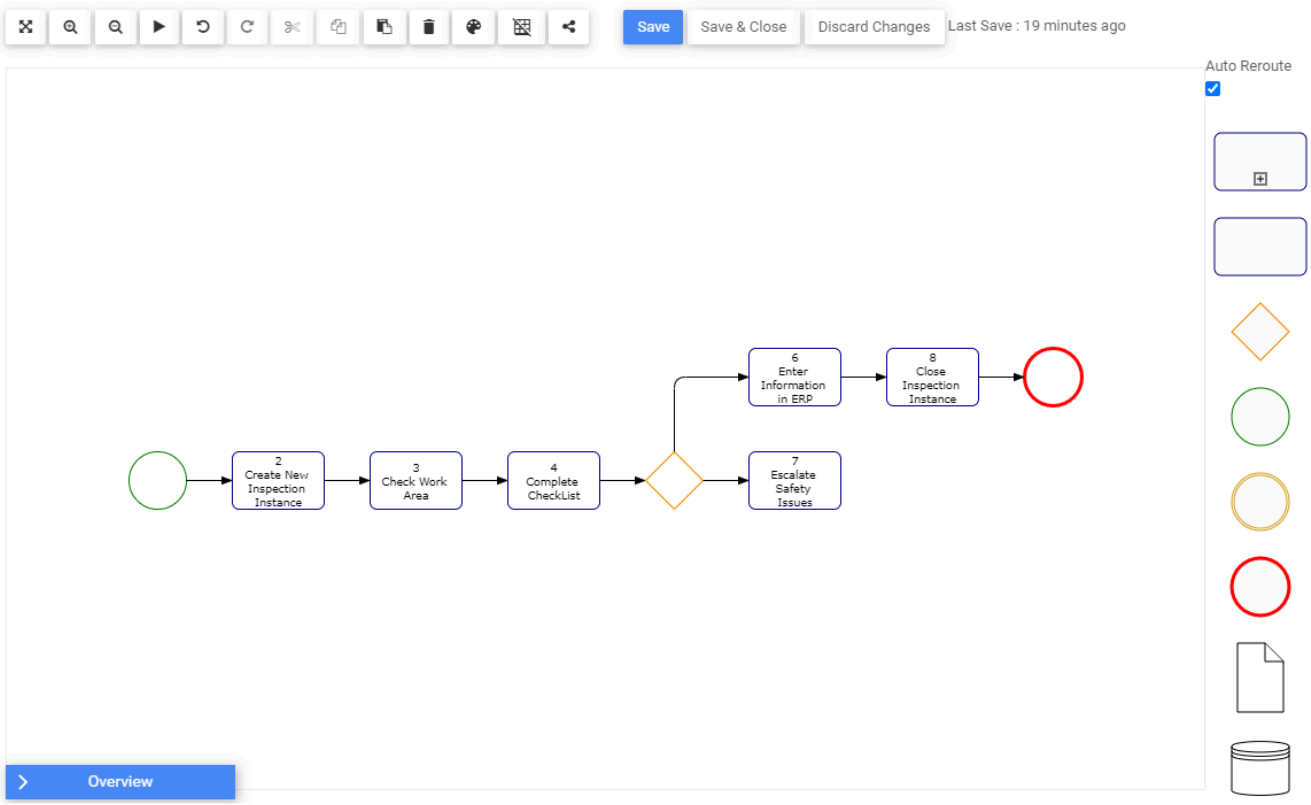
12.2.2.1.2.16 Set Colors

The Set Colors function allows Web Modelers to change the color of shapes. The Set Colors button is located on the toolbar at the top-left of the Edit Screen.

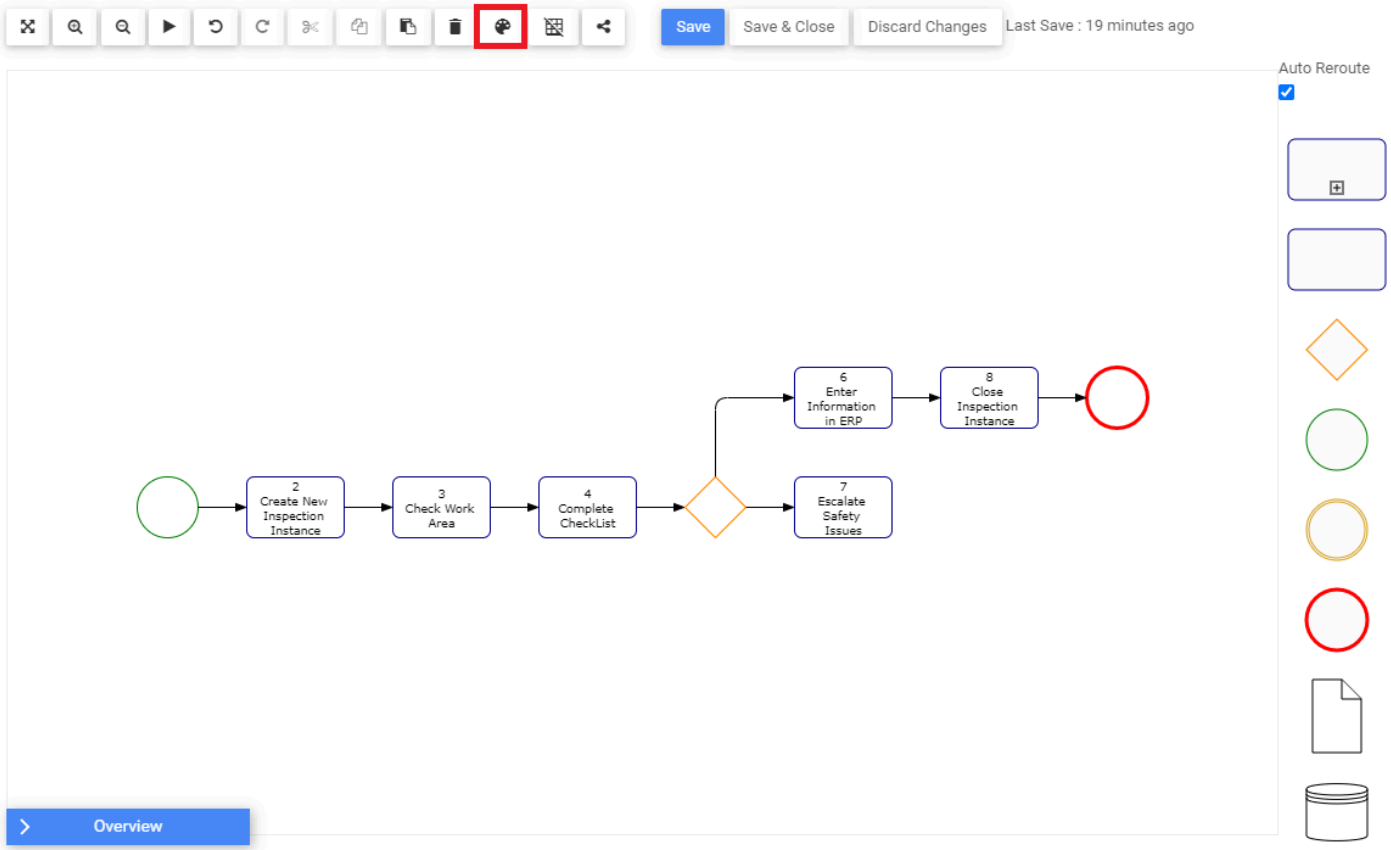
To use the Set Colors options, please see the following instructions.

> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

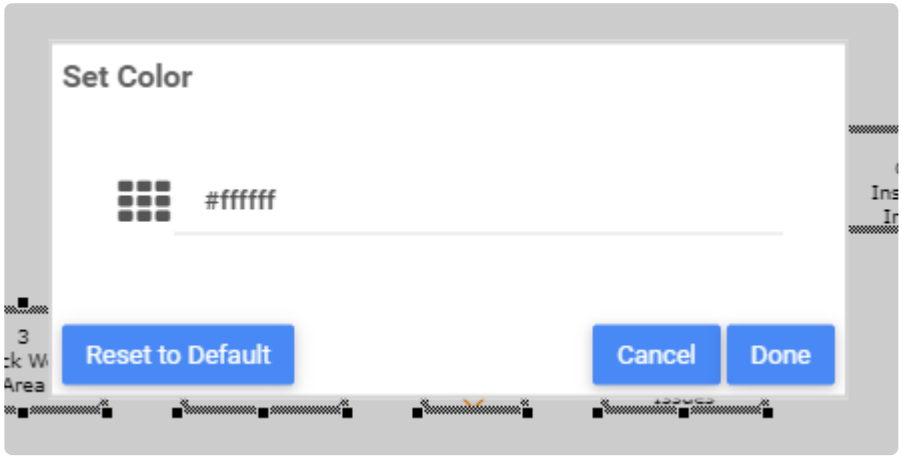
1. Navigate to the Full Screen Edit Mode using the Edit Button



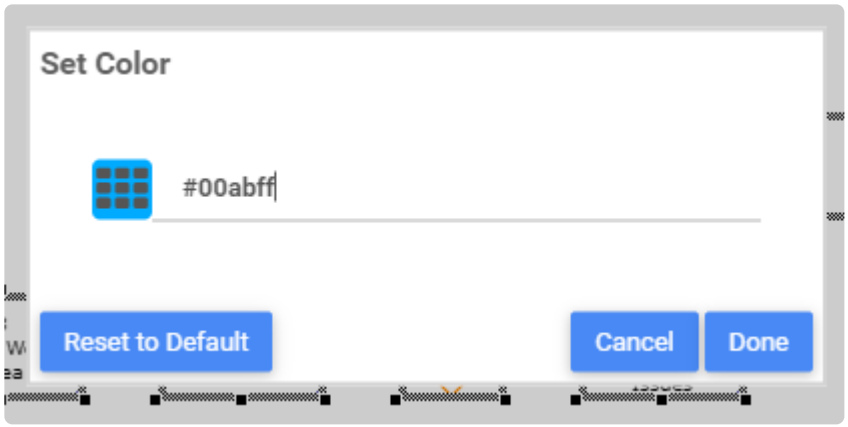
2. Click on the button to change the colors of the shapes.



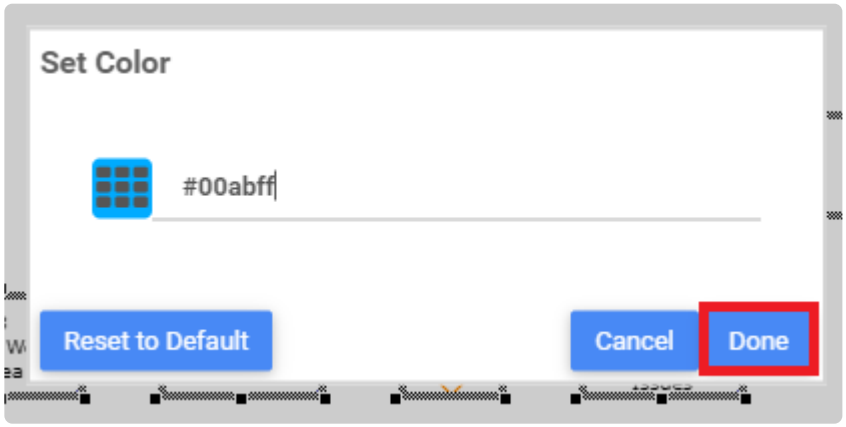
3. A window will appear to change the color of your shapes.



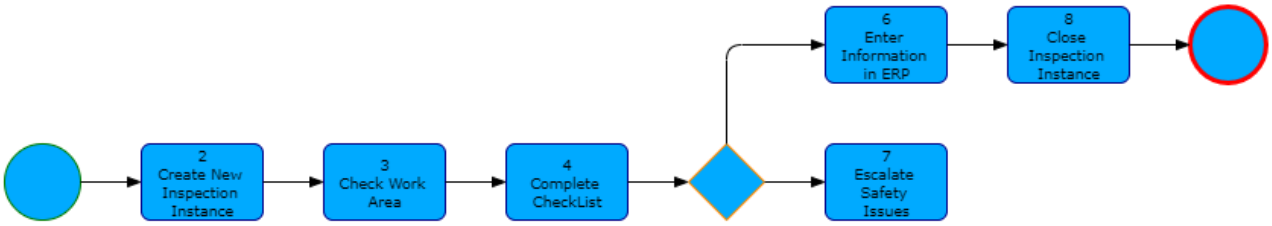
4. Select a color



5. Click on **Done**



6. The shape will change to the new color set by the user



12.2.2.1.2.17 Map Page-Break Canvas

The Canvas function has been implemented to assist Web Modelers at displaying page limits on the map editing canvas and designing maps or rearranging flow objects within its page size limits. The Canvas grid feature can be accessed when Web Modelers go on Edit Mode. The Canvas button is located on the toolbar at the top-left of the Edit Screen.

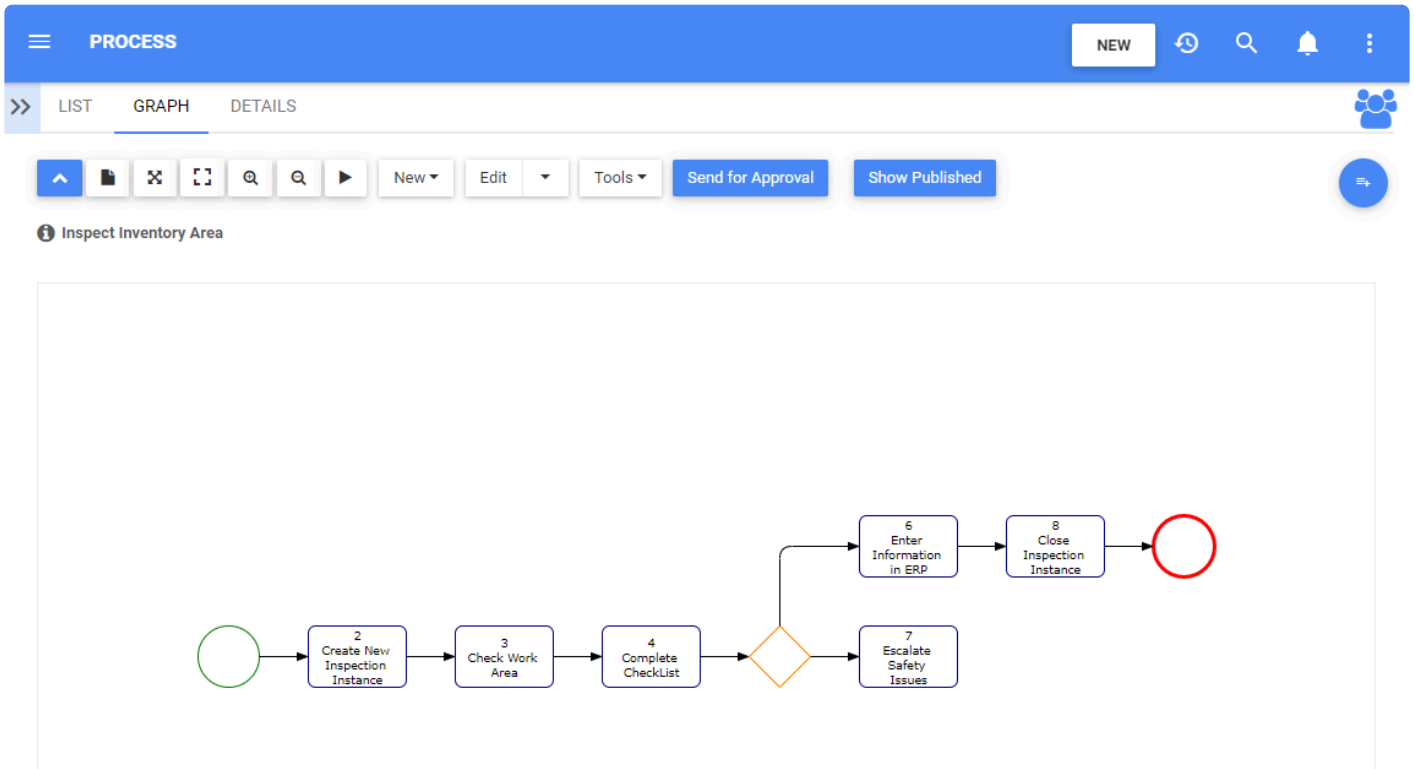
To use the canvas grid button, please see the following instructions.

> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

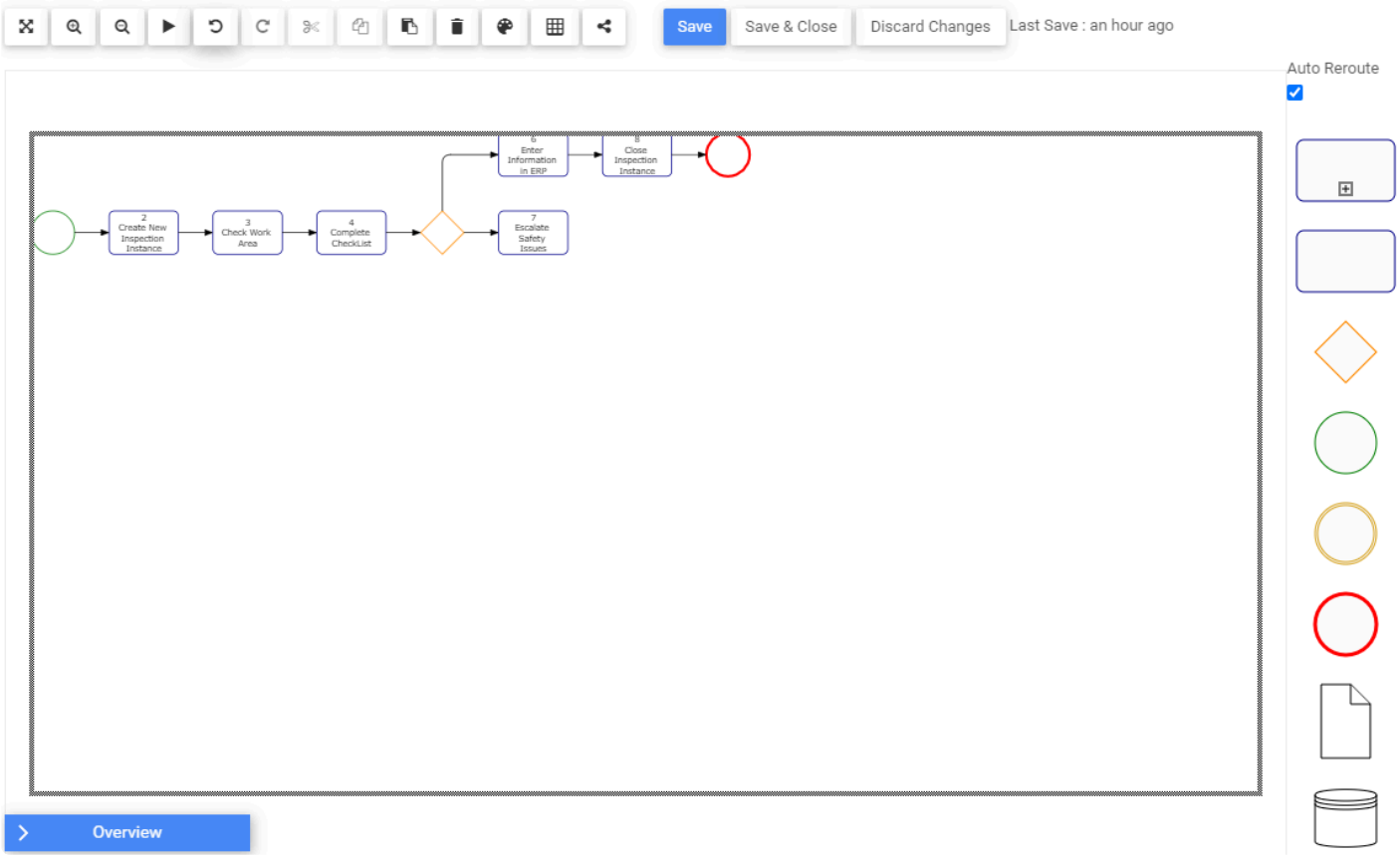
> By default, the canvas option is enabled and you can toggle it off by clicking on it.

> It is recommended to set your Default Page Orientation & Size from the Environment Admin Setting and maintain that standard throughout the organization.

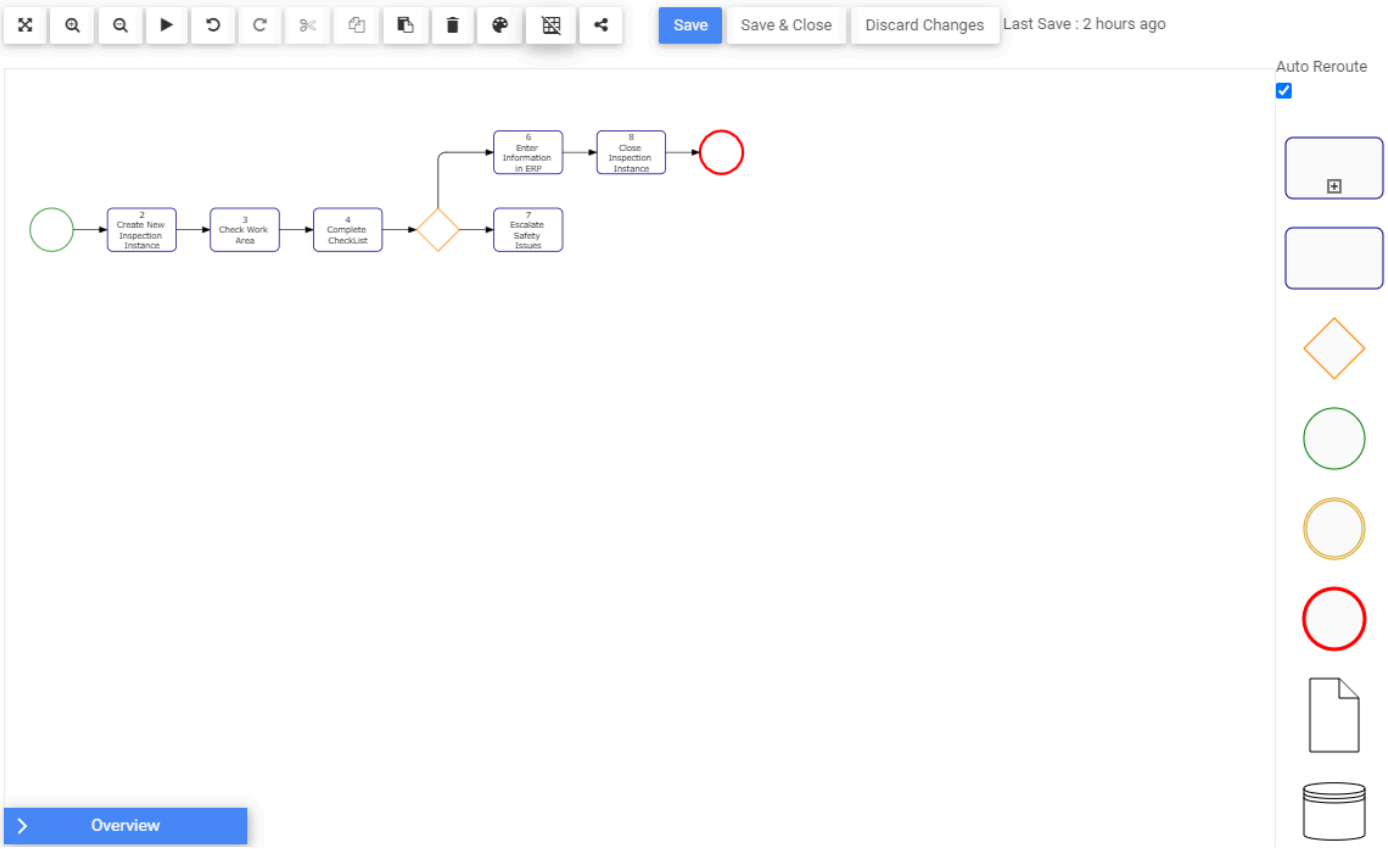
1. Navigate to the Full Screen Edit Mode using the Edit Button



2. By default the canvas is turned on

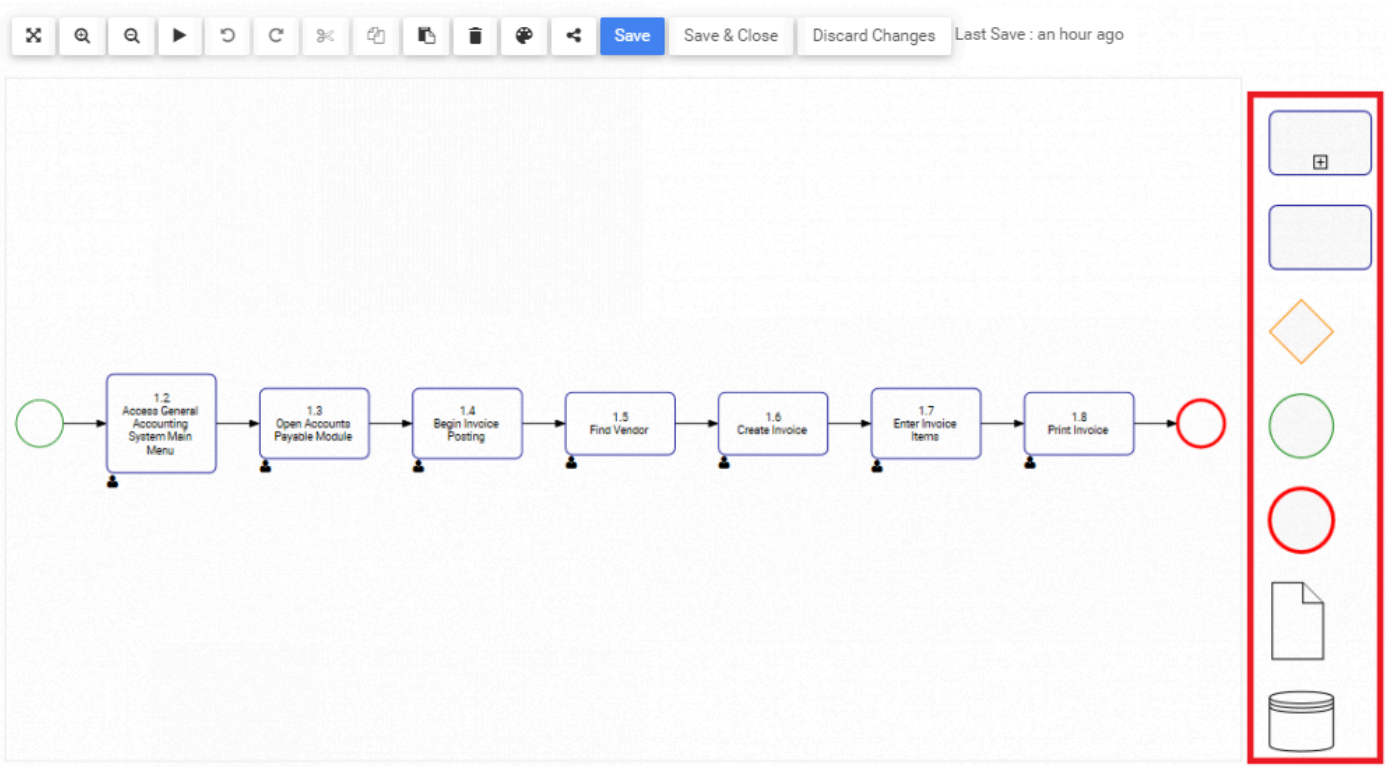


3. Click on the button to turn off the canvas grid

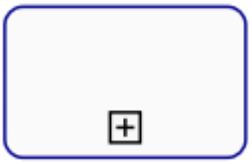

Save
Save & Close
Discard Changes
Last Save : 2 hours ago
Auto Reroute
2 Create New Inspection Instance
3 Check Work Area
4 Complete CheckList
6 Enter Information in ERP
7 Escalate Safety Issues
8 Close Inspection Instance
Overview

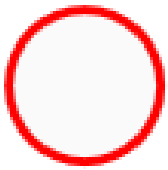
12.2.2.2 Map a Process

Web Modelers can directly map processes on the Web App. The Shape Menu is available in the Full Screen Edit Mode, these shapes are used to map the organization's processes. The EPC supports the BPMN 2.0 as its standardized modelling notation to graphically represent specific processes on a map.



Please see the table below for a full list and description for each shape:

Shape	Icon	Description
Sub Process Shortcut		A Sub Process is collection of activities that represent a business process A Shortcut is used to refer to a sub-process that is repeated in another process
Task		A Task is a single action that occurs in a business process

Gateway		A Gateway is used to control the divergence and convergence of multiple sequence flows
Start Event		A Start Event is the event that starts a business process
End Event		An End Event is the event that ends a business process
Artifact		Artifacts are data objects that represent data placed into the process, data resulting from the process, data that needs to be collected, or data that must be stored
Data Store		A data store is a place where the process can read or write data

The “Process Map Shapes” section will cover the following:

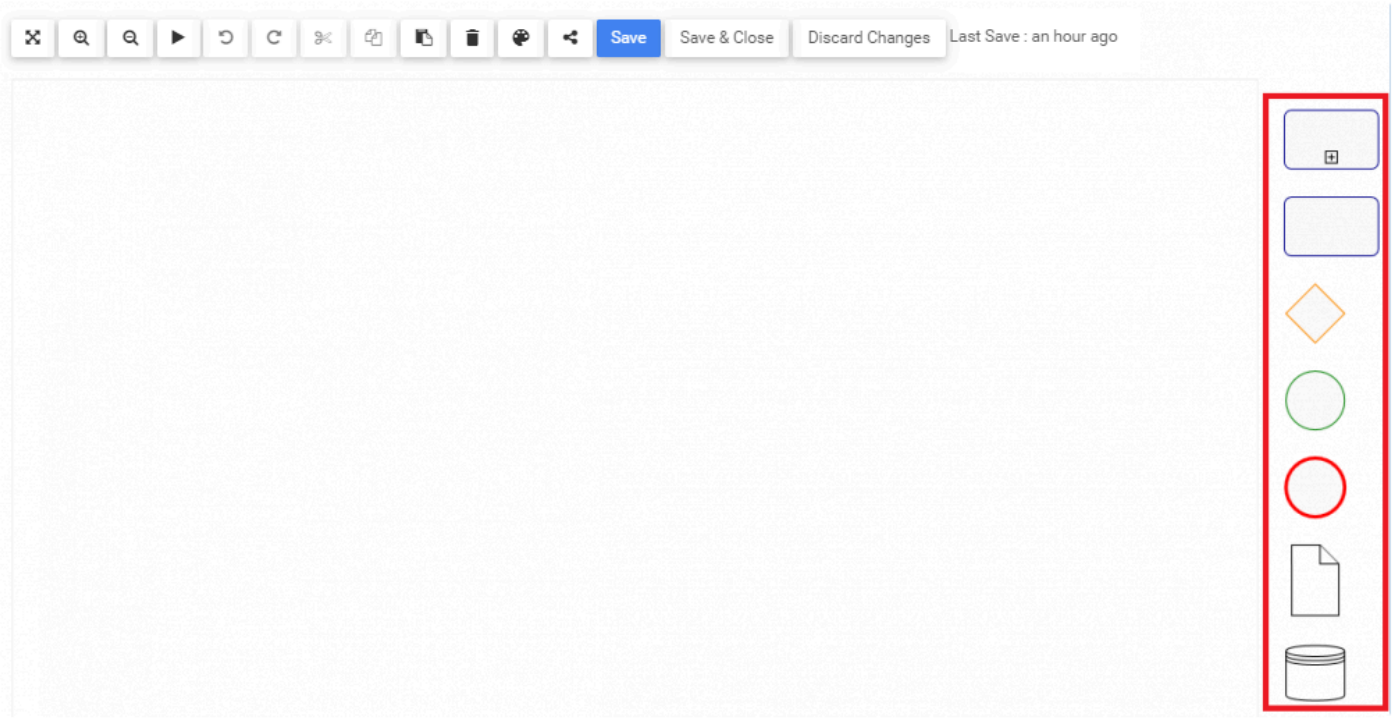
1. Add Shapes
2. Edit Shapes Name
3. Connect Shapes
4. Resize Shapes
5. Multi-Select Shapes
6. Move Shapes
7. Move a Process Map
8. Reroute a Flow
9. Delete Shapes and Flows
10. Associate Objects to Shapes

12.2.2.2.1 Add Shapes

To Add Shapes, please see the following instructions.

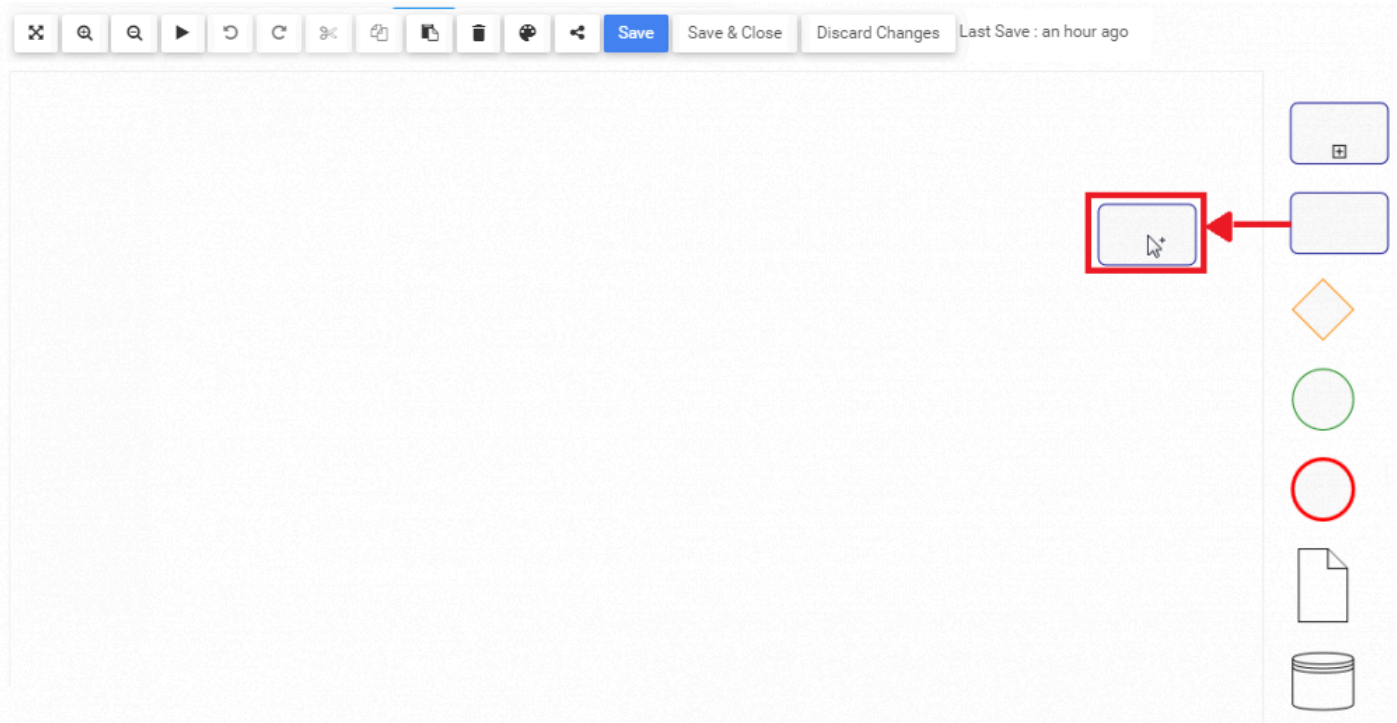
Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

1. Navigate to Full Screen Edit Mode, after clicking on Edit Button. Navigate to the shape menu

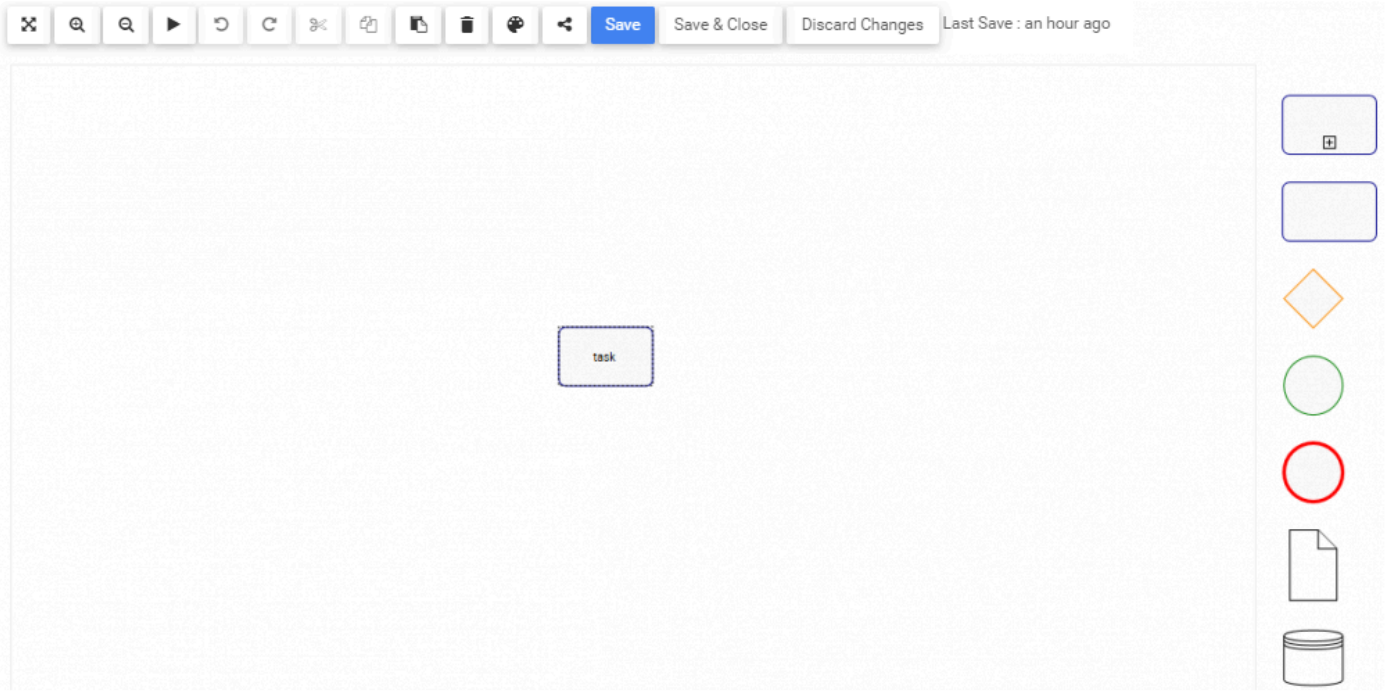


2. Choose the shape you desire to add. Grab it (left-click with mouse) and drag (hold left-click) it to the map. For this example, add a Task.

While you drag the shape to the map, you need to **constantly** hold the shape with a left-click on the mouse



3. Release the shape where you desire on the screen



To move shapes in the mapping canvas, click here

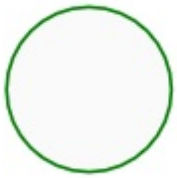
12.2.2.2.1.1 Quick Shape Mapping

Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

1.Navigate to the Graph section of the process.

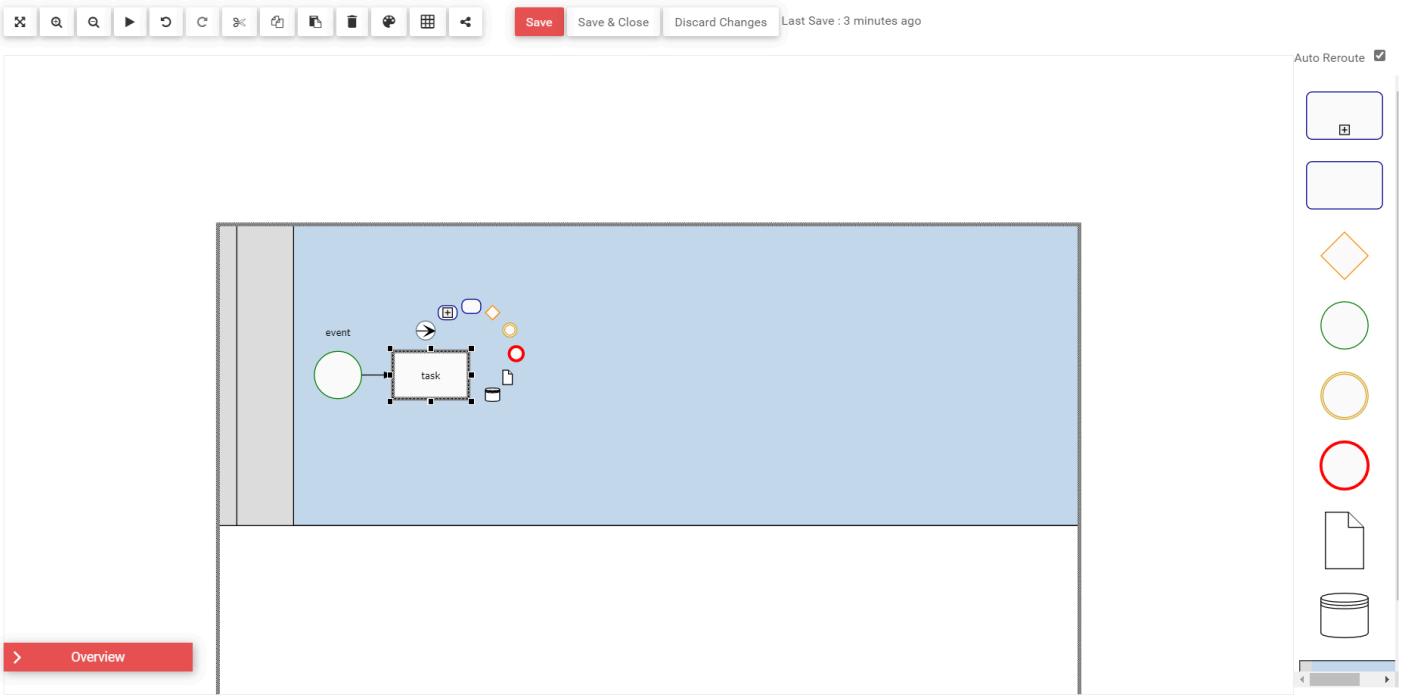
2.Click on the Edit button, directed to Full-Screen Edit mode.

3. Click left click on a flow object.

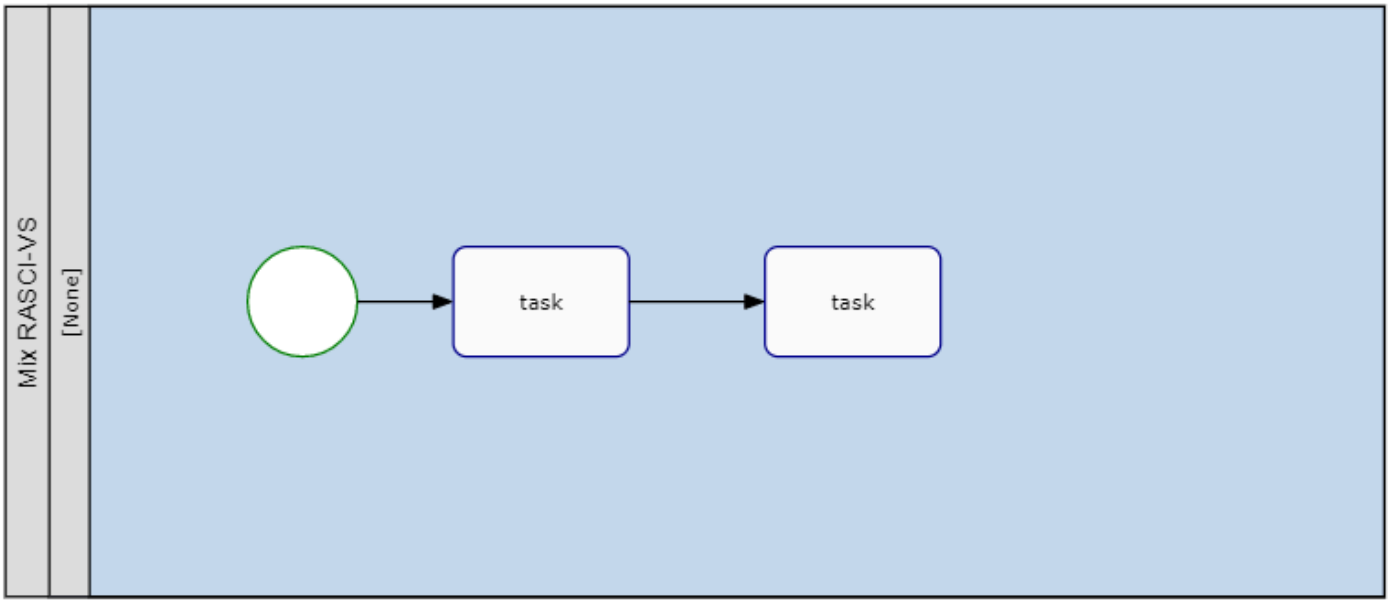


4. Then a BPMN 2.0 object types menu will appear around the flow object.

5. Select the object type you desire to add and place it.



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



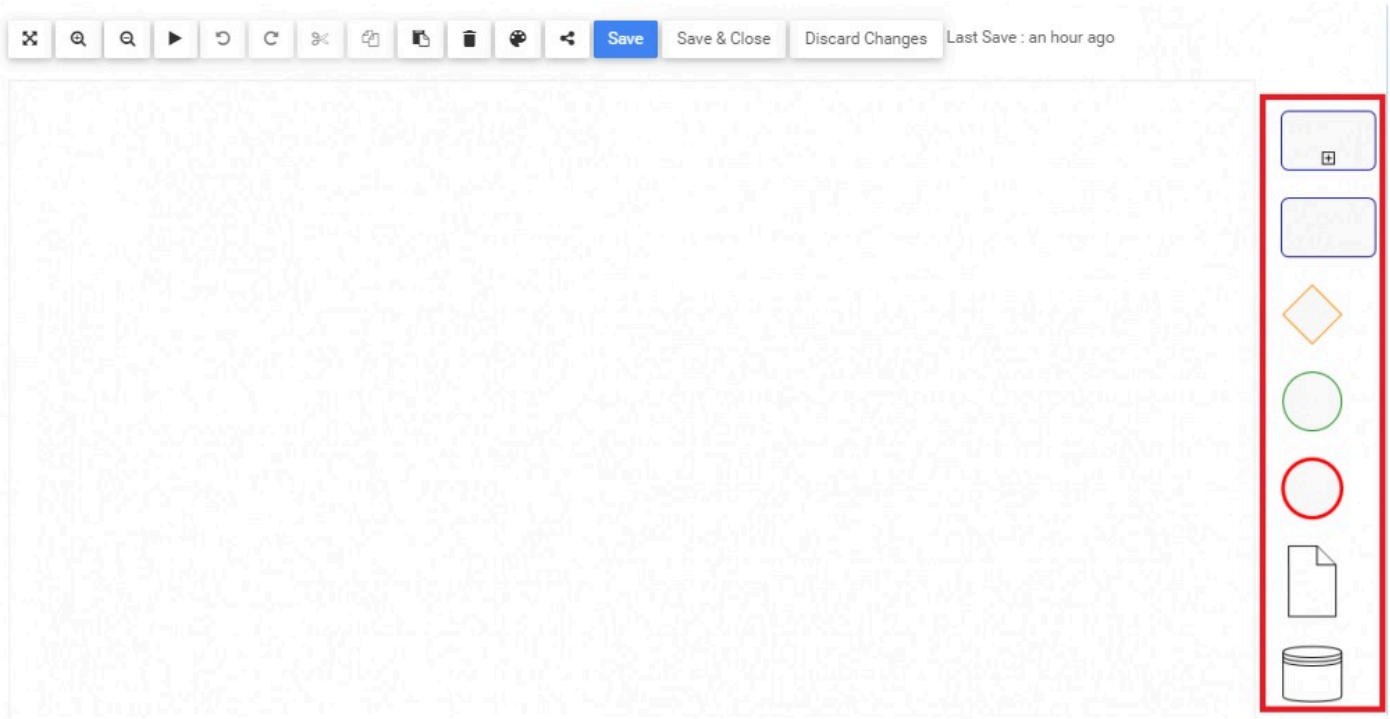
12.2.2.2.2 Edit Shapes Name

h3. To Edit Shapes Name, please follow the instructions.

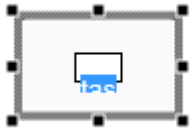
> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

1. Navigate to Full Screen Edit Mode, after clicking on Edit Button

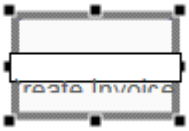
2. Double-click on the shape to in-line edit the name of the shape.



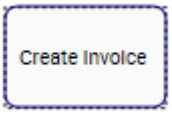
3. A box will be generated where you can type the name of the shape.



4. Type the name of the task. For this example, type “Create Invoice”



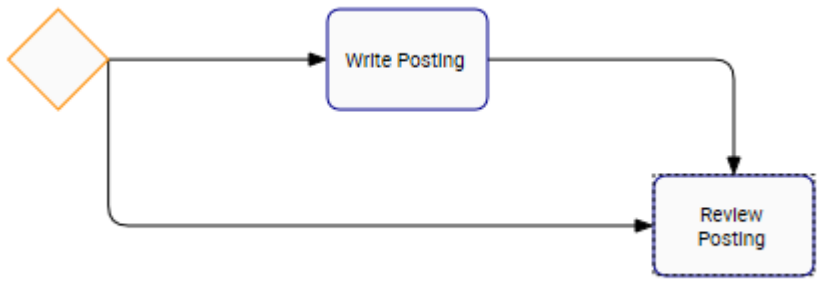
5. Click Enter on your keyboard after you finished editing the name.



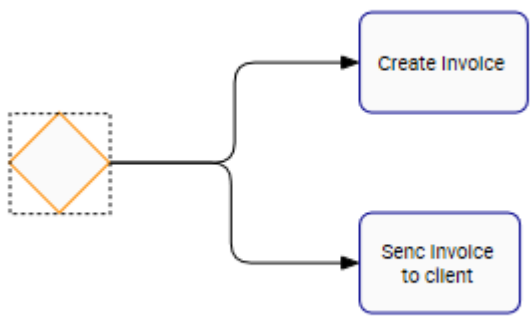
12.2.2.2.3 Connect Shapes

Web Modelers can connect flow objects in a proper sequential order to have a process flow. The transition flow leaves from a source shape to a target shape.

A Target shape can have one or many **incoming** flows:



A Source shape can have one or many **outgoing** flows:



> Start Events cannot be a target, and End Events cannot be a source

We recommend using BPMN 2.0 rules to map processes and connect shapes.

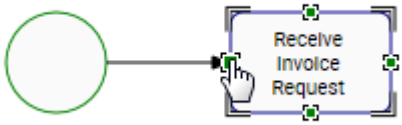
To Connect Shapes, please follow the instructions.

> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

1. Navigate to Full Screen Edit Mode, after clicking on Edit Button
2. Click on the Source shape (left-click on mouse). In this example, the start shape is “Start Event”

3. Drag out the flow (left-click hold) to the Target. In this example, drag the flow from the “Start Event” to the “Task: Receive Invoice Request”

4. The task shape will now have target port points (green squares). Connect the transition flow to the target port you desire.



While you drag the flow from and to shapes, you need to **constantly** hold the flow with a left-click on the mouse

5. Release the flow, once you dragged the flow to the target port

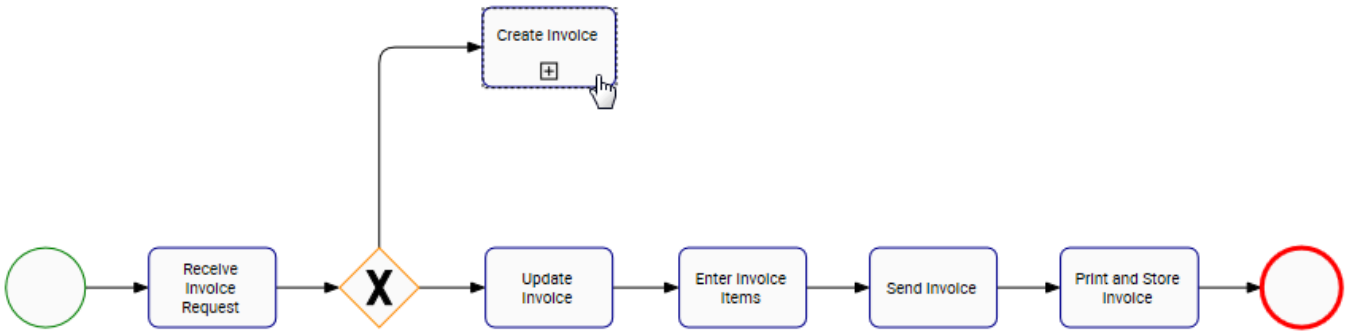
6. To differentiate transition arrows, you can also change their colors by right-clicking on the desired arrow and select “set color”.

IMAGE

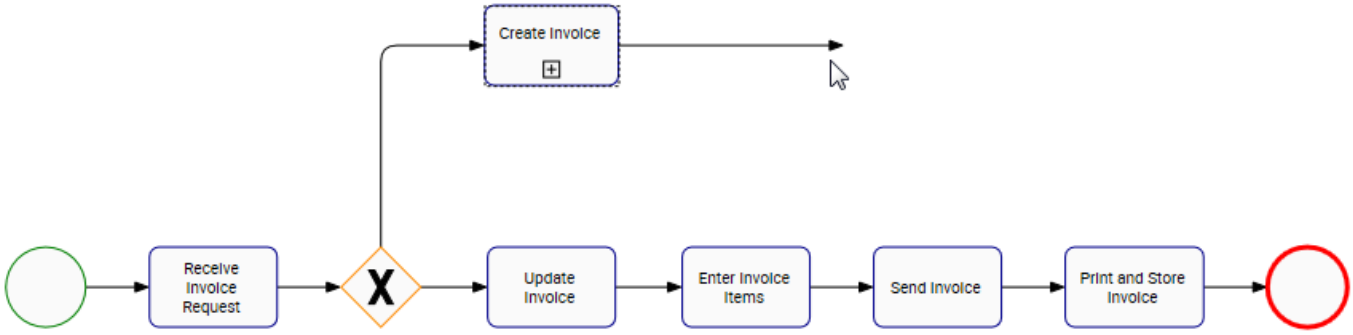
To Change the Direction of the Flow Shape, please follow the

instructions

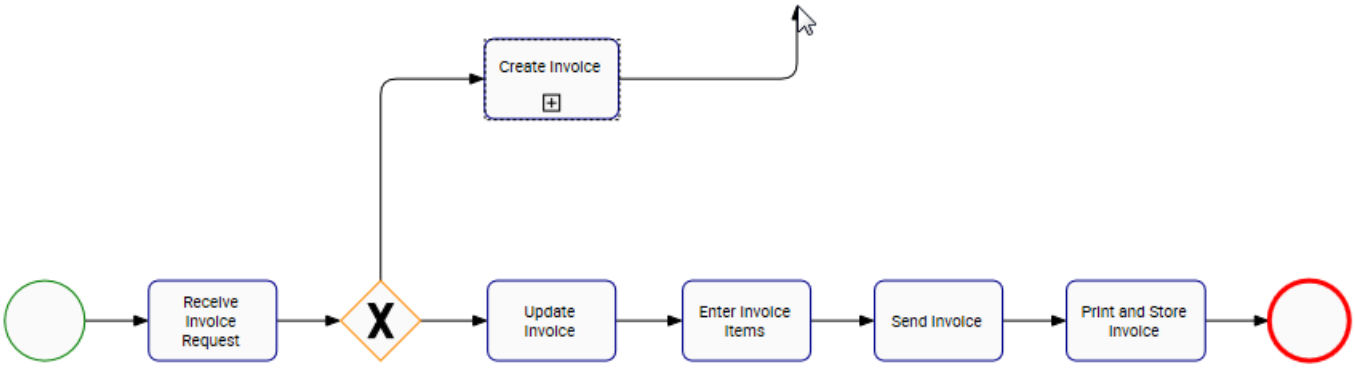
1. Click on the shape you want to start the connection (left-click on mouse). In this example, the start shape is “Start Event”



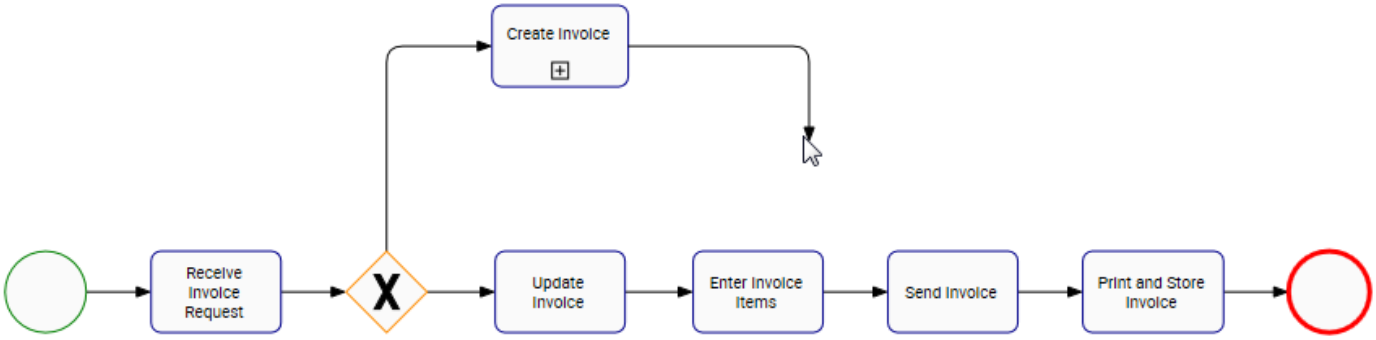
2. Drag out the flow (left-click hold)



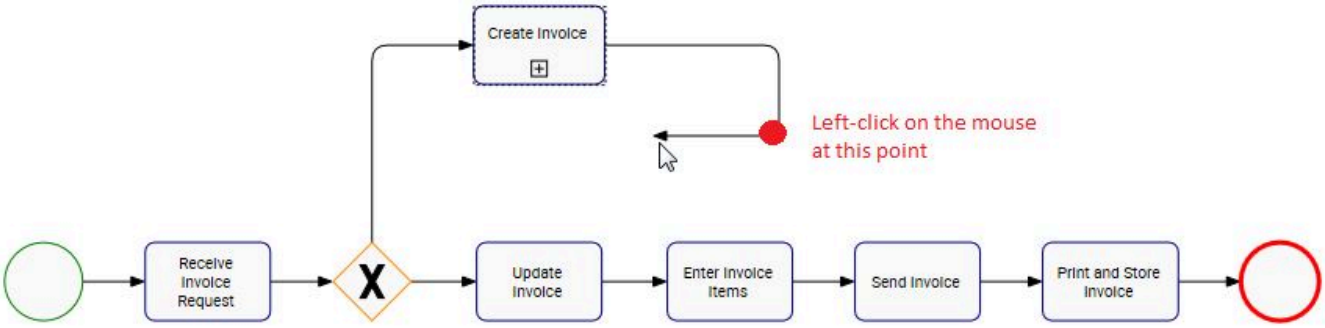
3. To change the direction of the flow to the left, move the mouse to the left



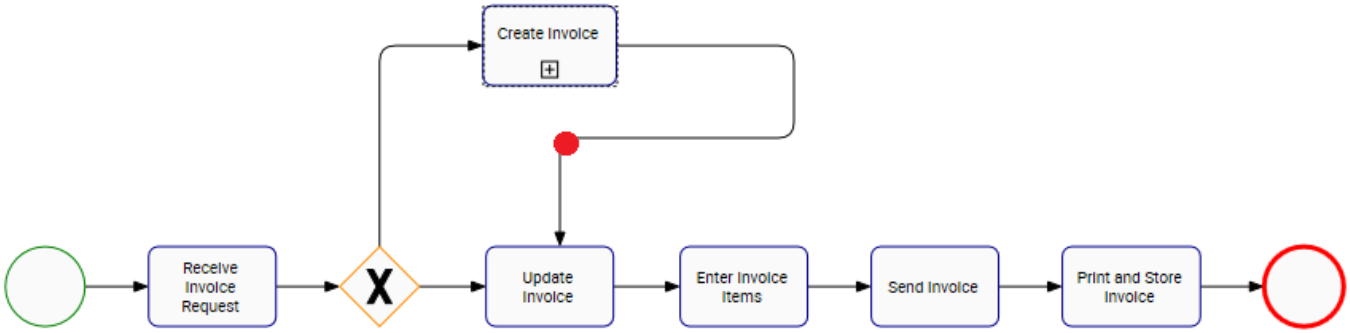
4. To change the direction of the flow to the right, move the mouse to the right



5. To make a break in the direction of the flow, left-click on your mouse and choose the new direction

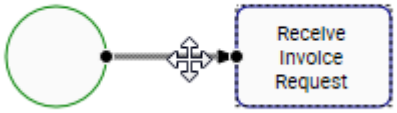


6. Make another flow break, and drag the flow to the task “Update Invoice”



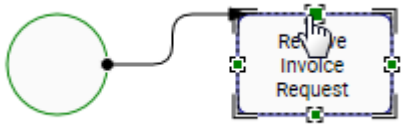
To Change the Source/Target Port, please follow the instructions

1. Navigate to the transition flow

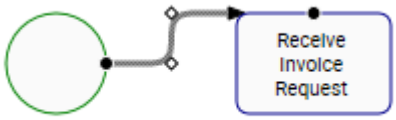


2. Navigate to the source/target port represented with a black circle. In this example, navigate to the target port in the task

3. Drag the target port to another port holding left-click on the mouse. The other ports will be green squares on the shape



4. Drop the flow on the new target port



To learn how to optimize the route of the Flow, navigate to the [Reroute a Flow]() section

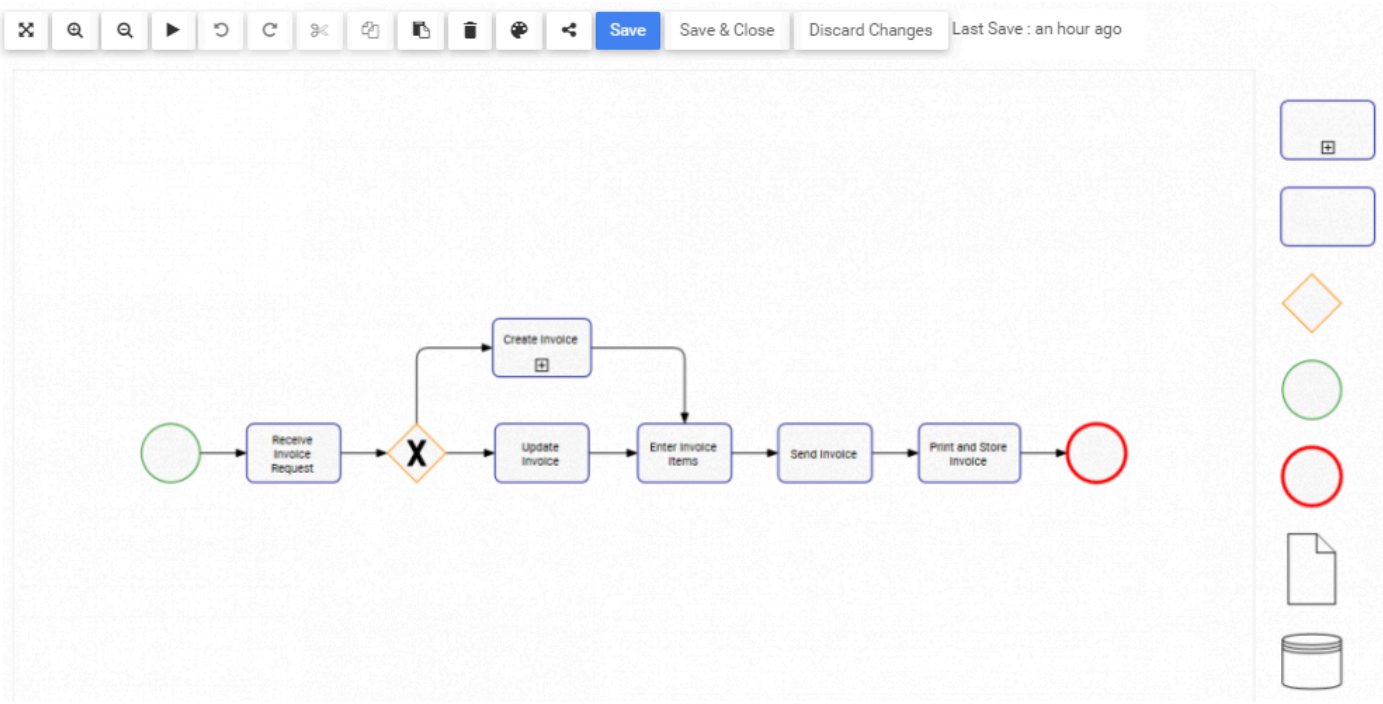
12.2.2.2.4 Resize Shapes

Web Modelers can resize shapes when mapping a process.

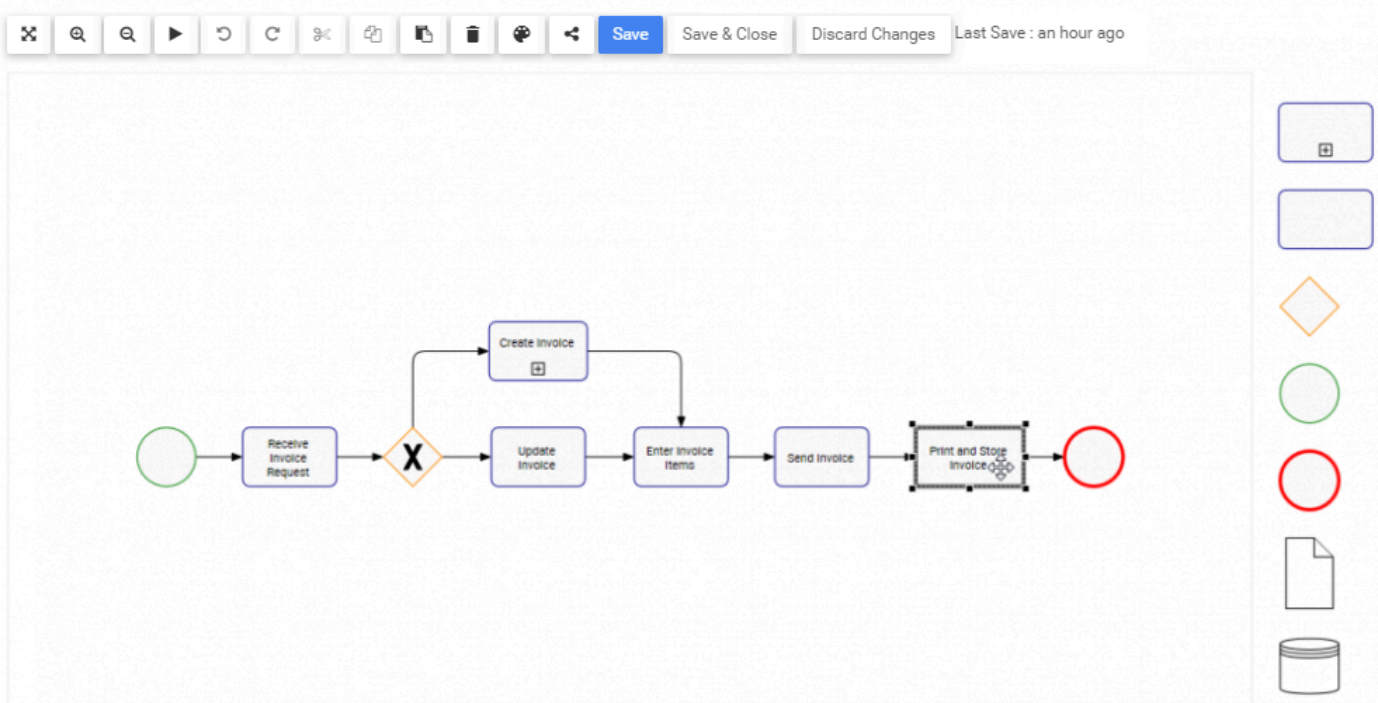
To Resize Shapes, please follow the instructions.

> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

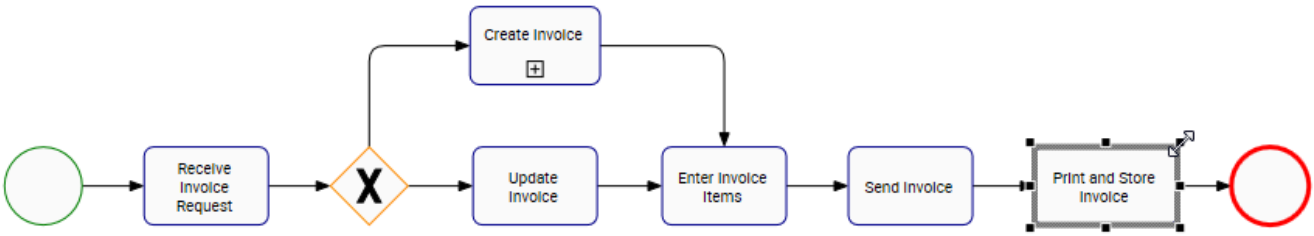
1. Navigate to Full Screen Edit Mode, after clicking on Edit Button



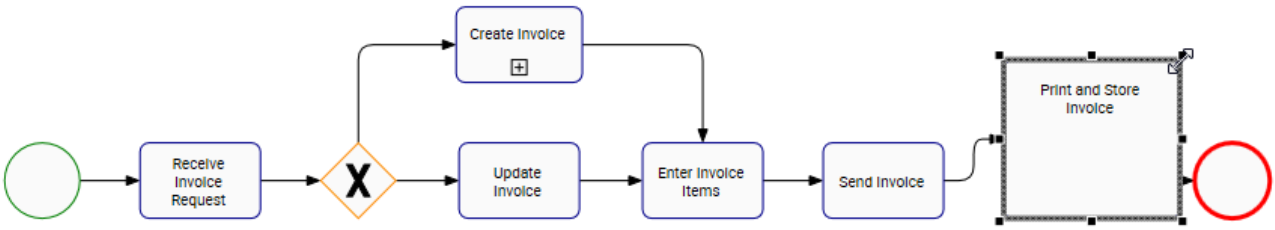
2. Select the shape you want to resize



3. Select one of the the squares that appear in the corners of the shape.



4. Drag the square of the shape to resize it



12.2.2.2.5 Multi-Select Shapes

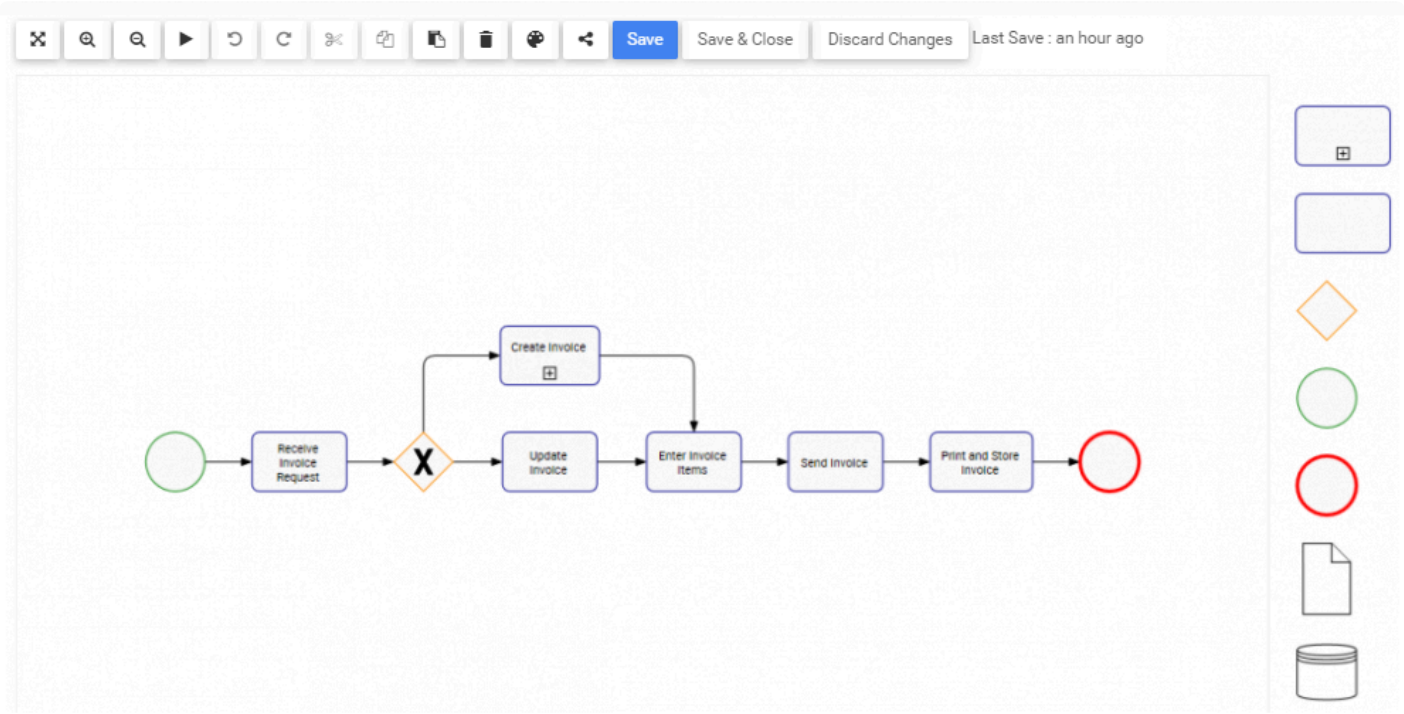
Web Modelers can Multi-Select shapes using the **Ctrl** key on your keyboard or click the left mouse button on the first item, hold the mouse button, move the cursor to the last item and then release the mouse button.

The Multi-Select function is useful when Web Modelers need to move, delete, copy, cut or assign responsibilities to multiple shapes.

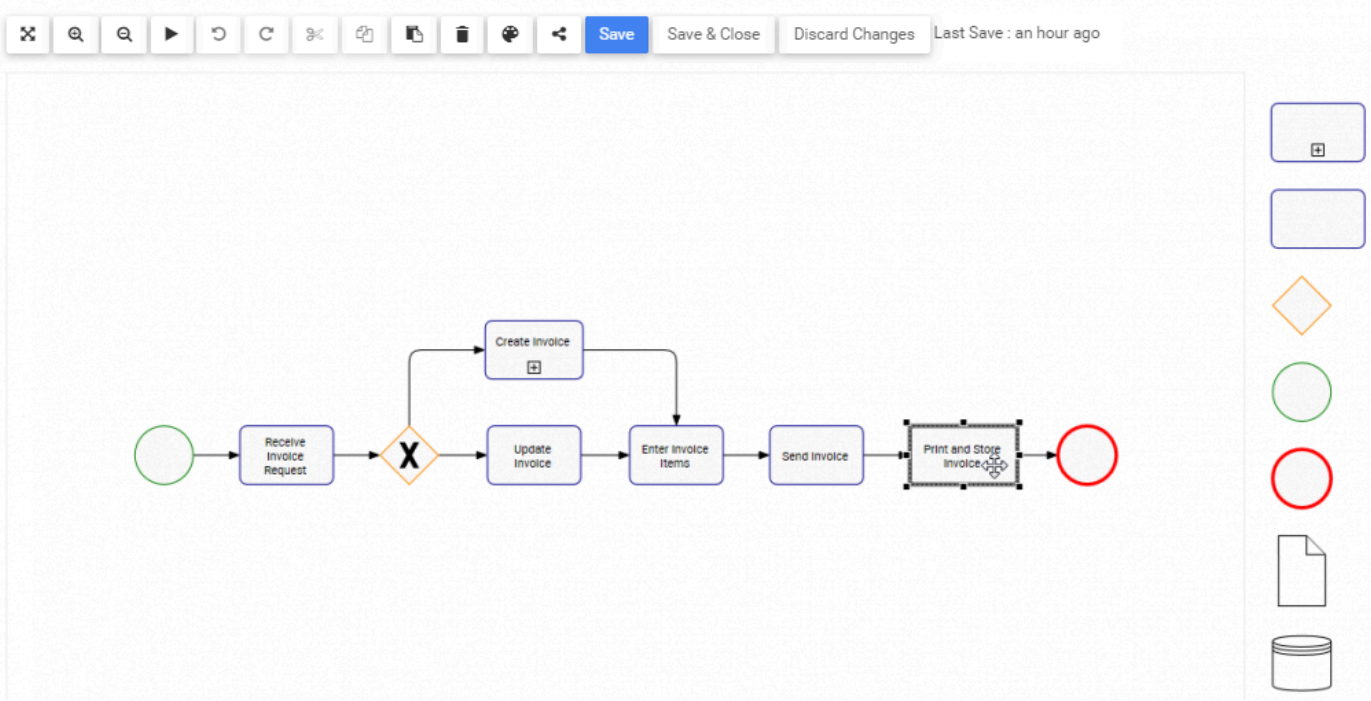
To Multi-Select Shapes, please follow the instructions.

> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

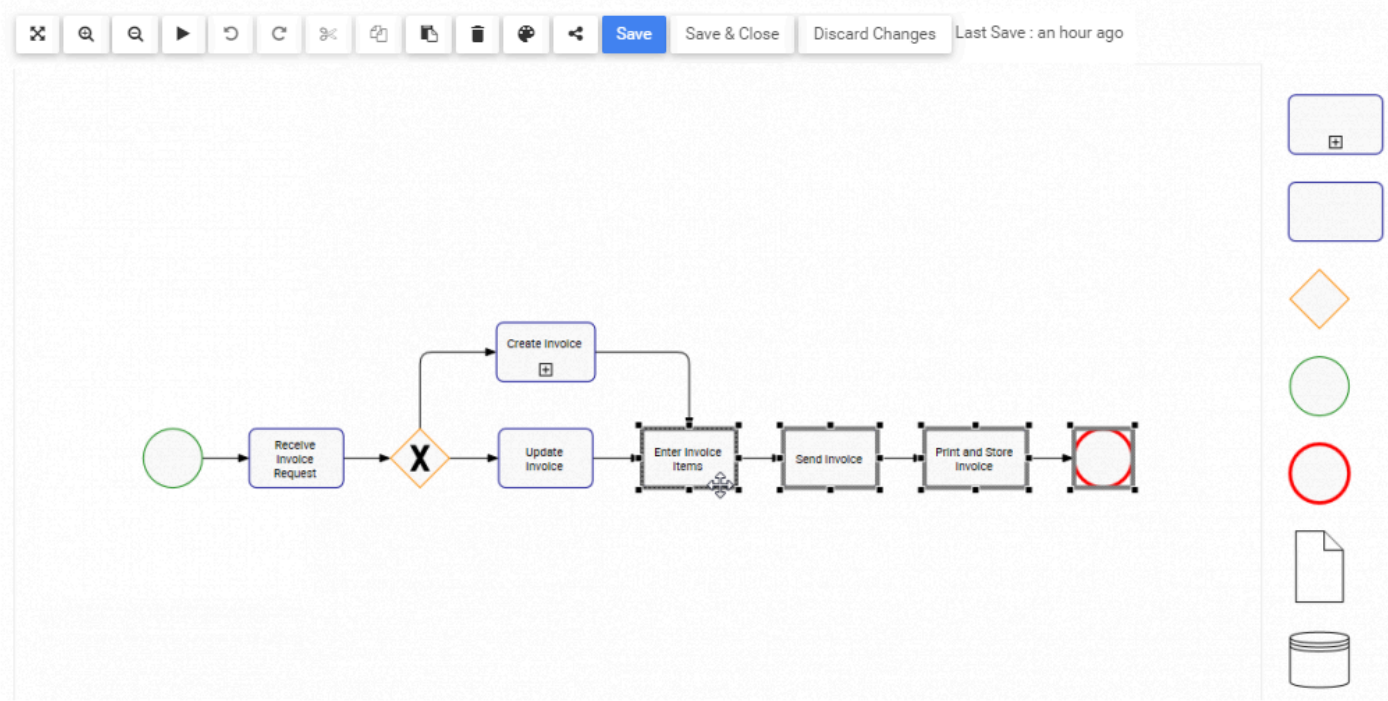
1. Navigate to Full Screen Edit Mode, after clicking on Edit Button



2. Select a shape on the map



3. Select more shapes on the map using the **Ctrl** key on your keyboard



4. Once you multi-selected shapes, you can move, copy, cut, delete or assign responsibilities to the shapes.

Function	Keyboard	Edit Toolbar

Multi-Select Copy	Ctrl+C	Ctrl+
Multi-Select Cut	Ctrl+X	Ctrl+
Multi-Select Delete	Ctrl+Delete	Ctrl+

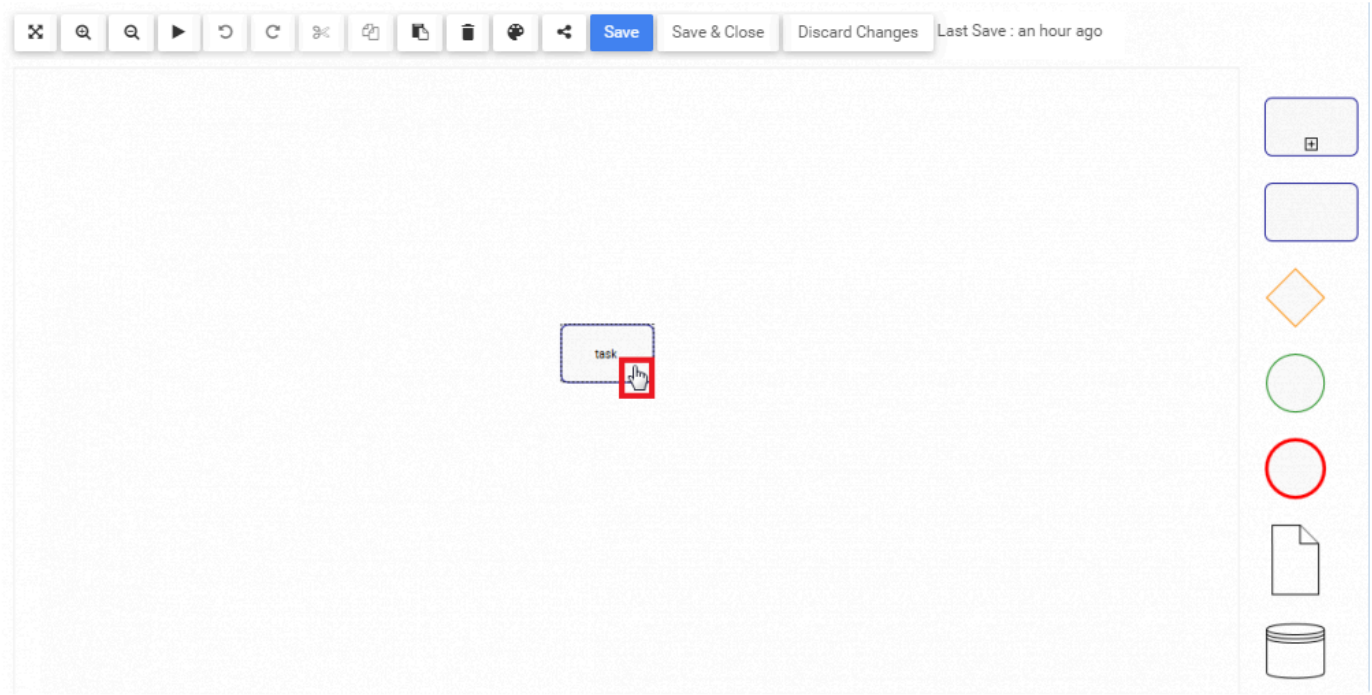
12.2.2.2.6 Move Shapes

To Move Shapes, please follow the instructions.

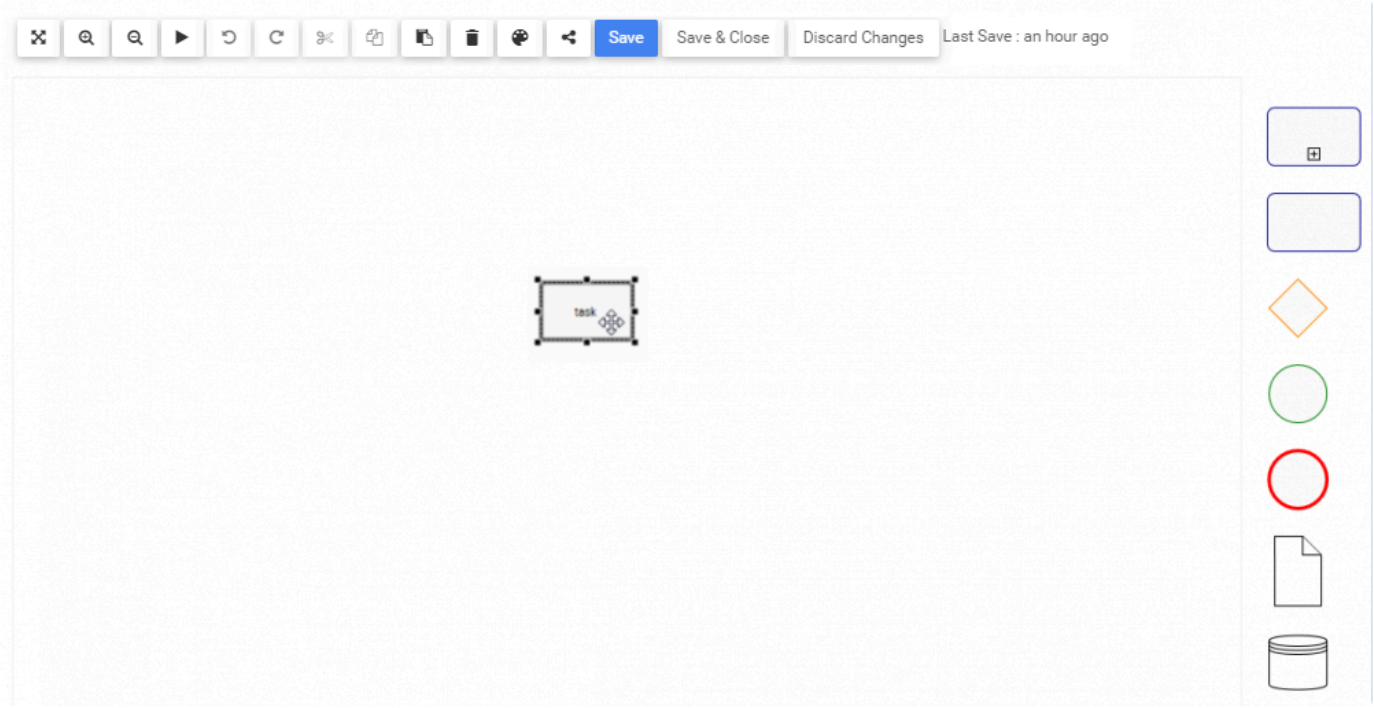
Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

1. Navigate to Full Screen Edit Mode, after clicking on Edit Button

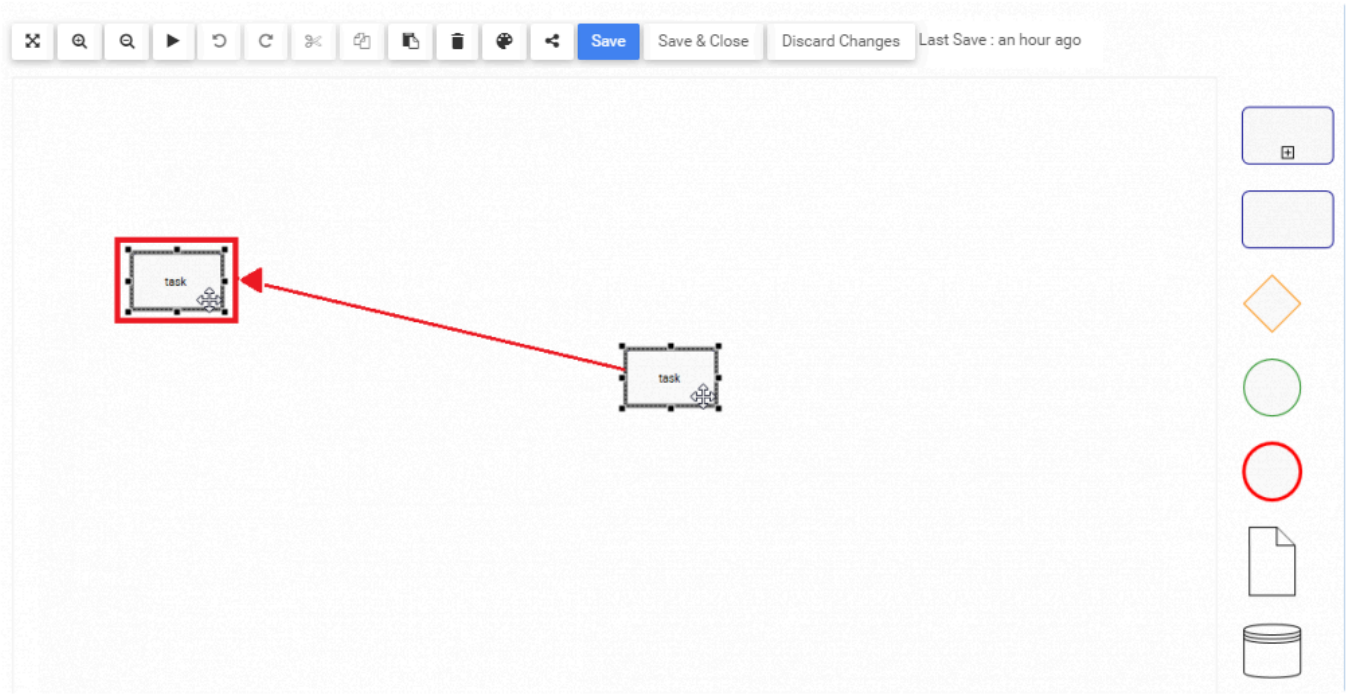
2. After you added shapes to the process map. Click on the shape you want to move.



3. The shape will now have end points enabling you to move it.



4. Grab the shape (left-click on mouse), and drag (hold left-click) it to the location you desire on the screen and then release it.



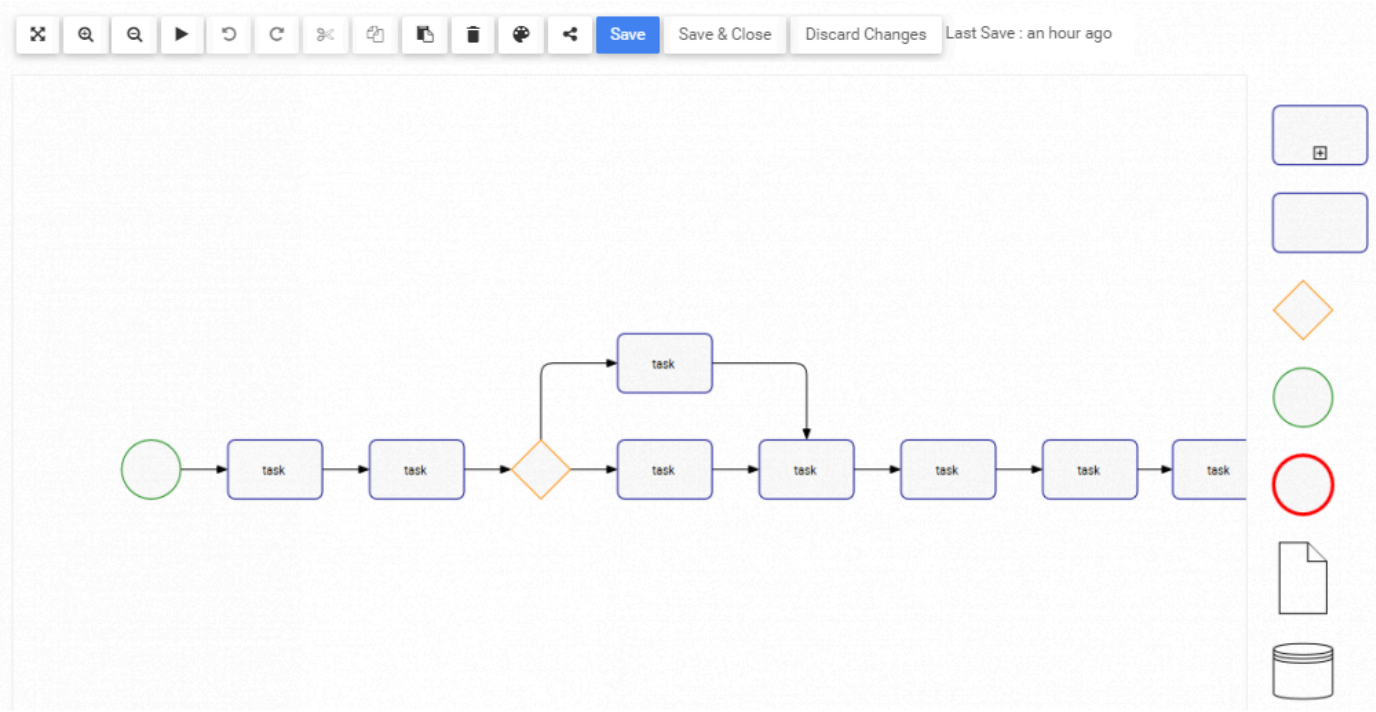
While you drag the shape to the map, you need to **constantly** hold the shape with a left-click on the mouse

The icon appears when you move shapes.

To Create More Space on the Canvas, please follow the instructions.

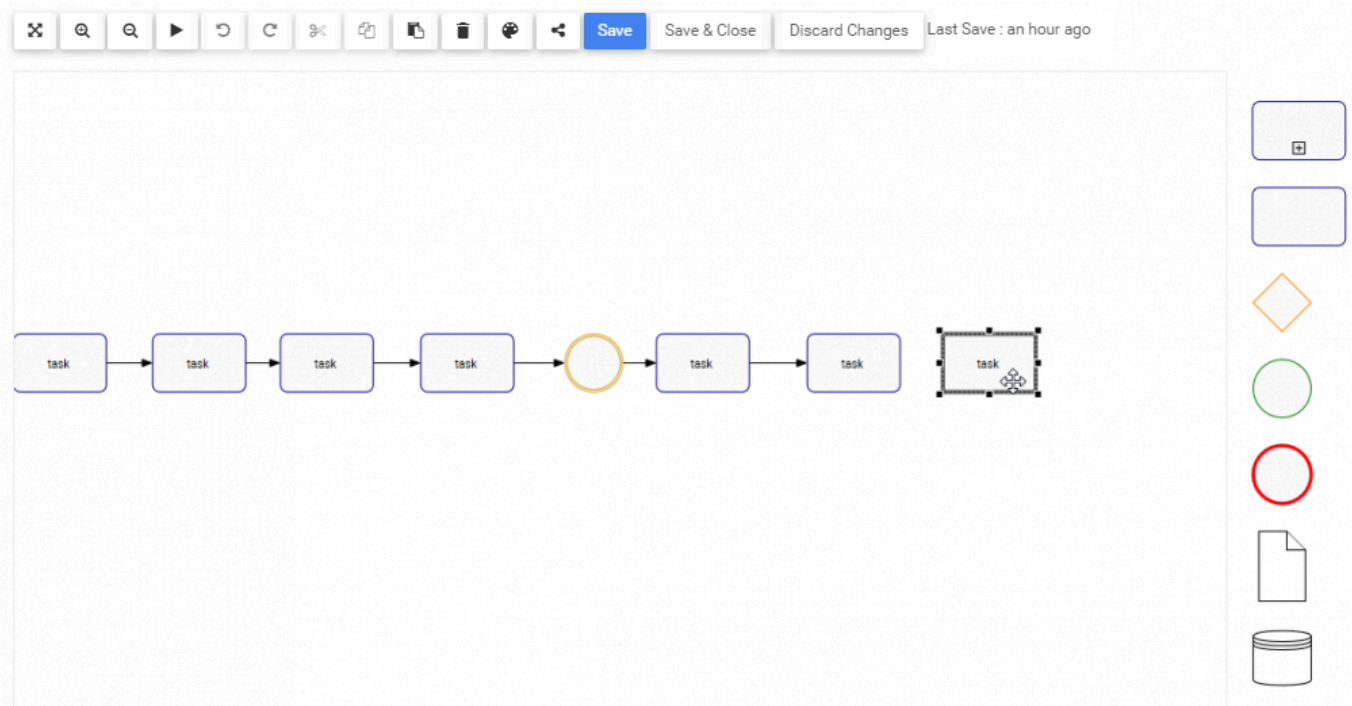
This function is used when Web Modeler are mapping large processes and need more space on the canvas.

1. Navigate to Full Screen Edit Mode, after clicking on Edit Button

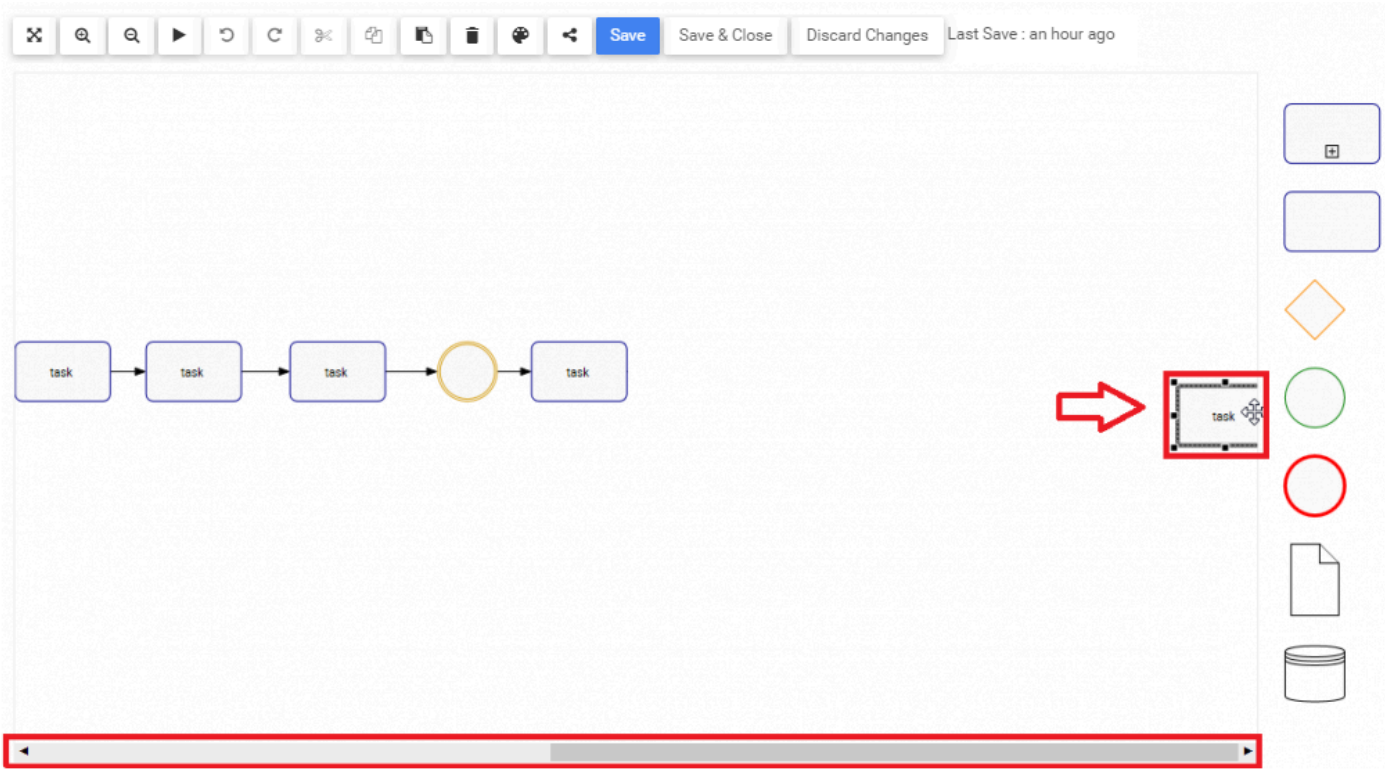


This process is large. The Web Modeler needs more space on the canvas to continue mapping

2. Navigate to a shape. In this example, a task

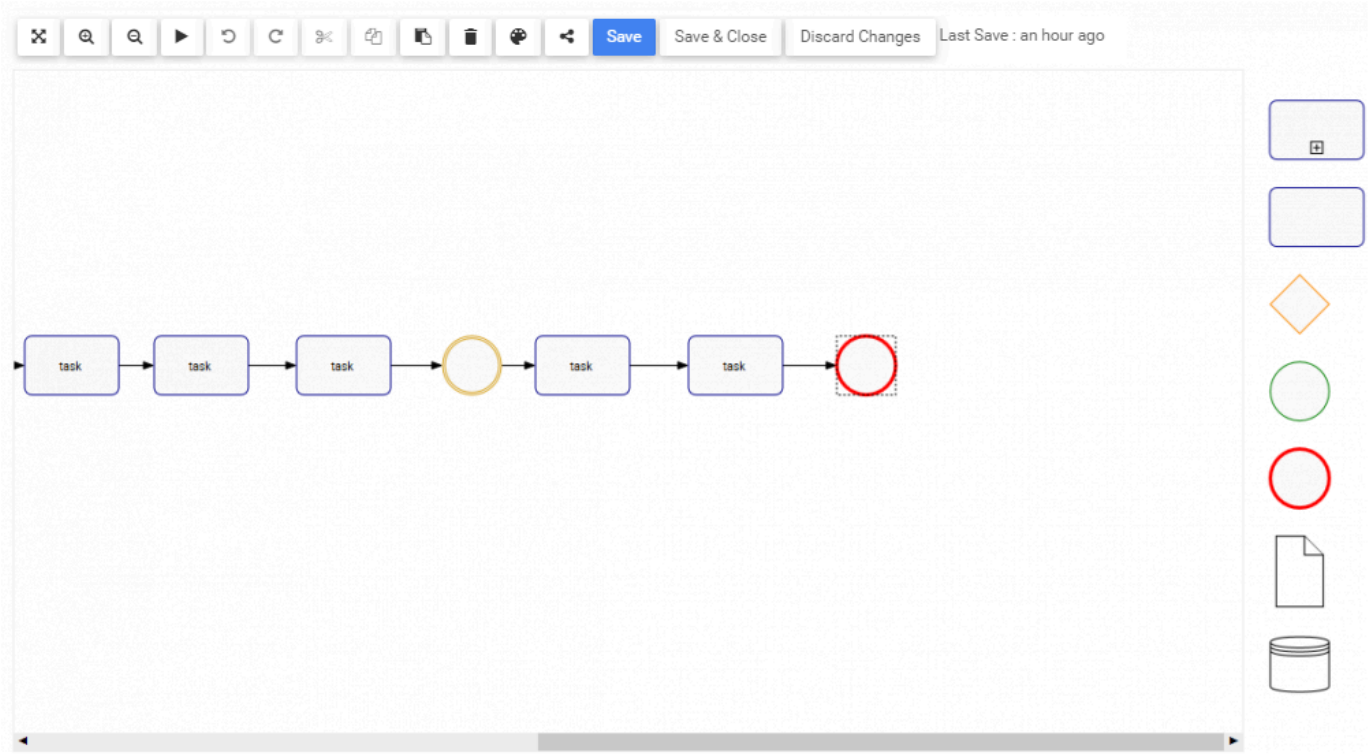


3. Drag the shape to the right. Release the right-click on your mouse when you have enough space to continue mapping.

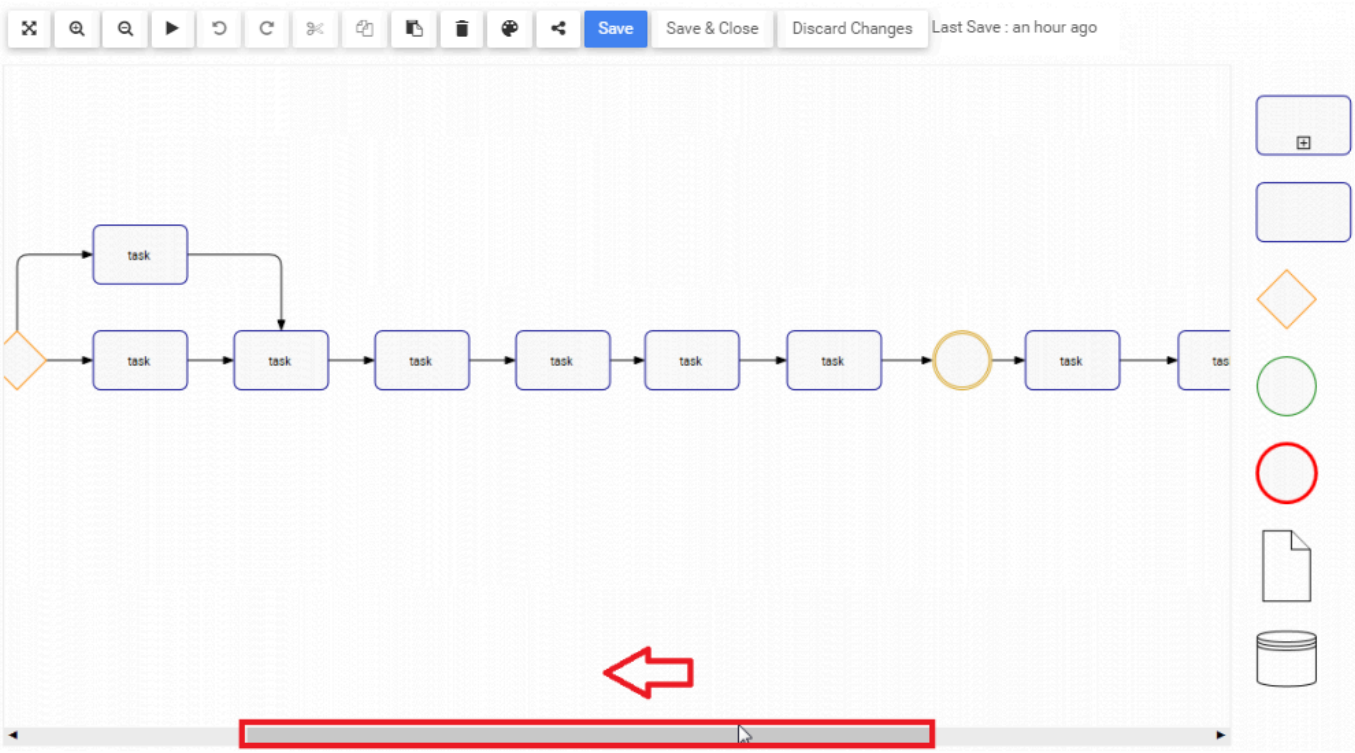


As you move the shape to the right, the space to map will increase, and the scroll-bar will expand

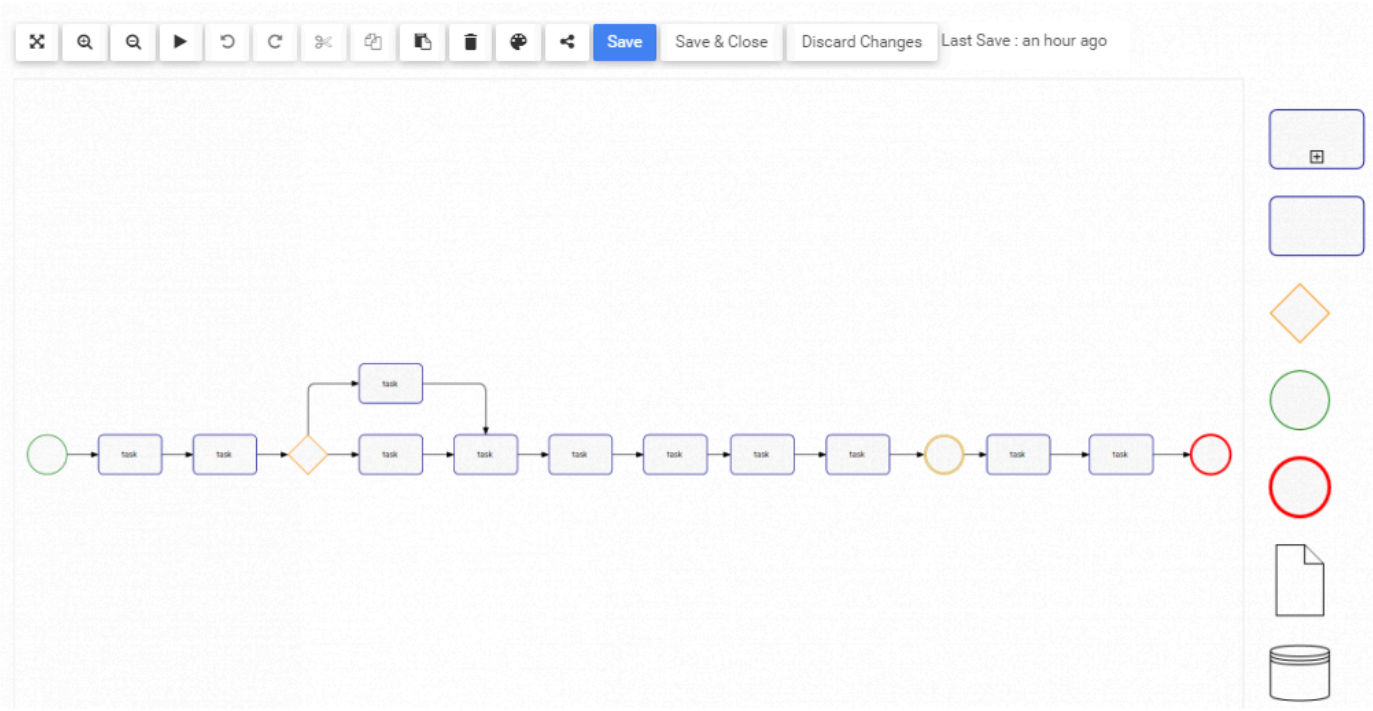
4. Finish mapping the process



5. Use the scroll-bar, and move it to the left to view other objects in the process



6. Use the Fit Screen button to view the entire process map


Save
Save & Close
Discard Changes
Last Save : an hour ago
task

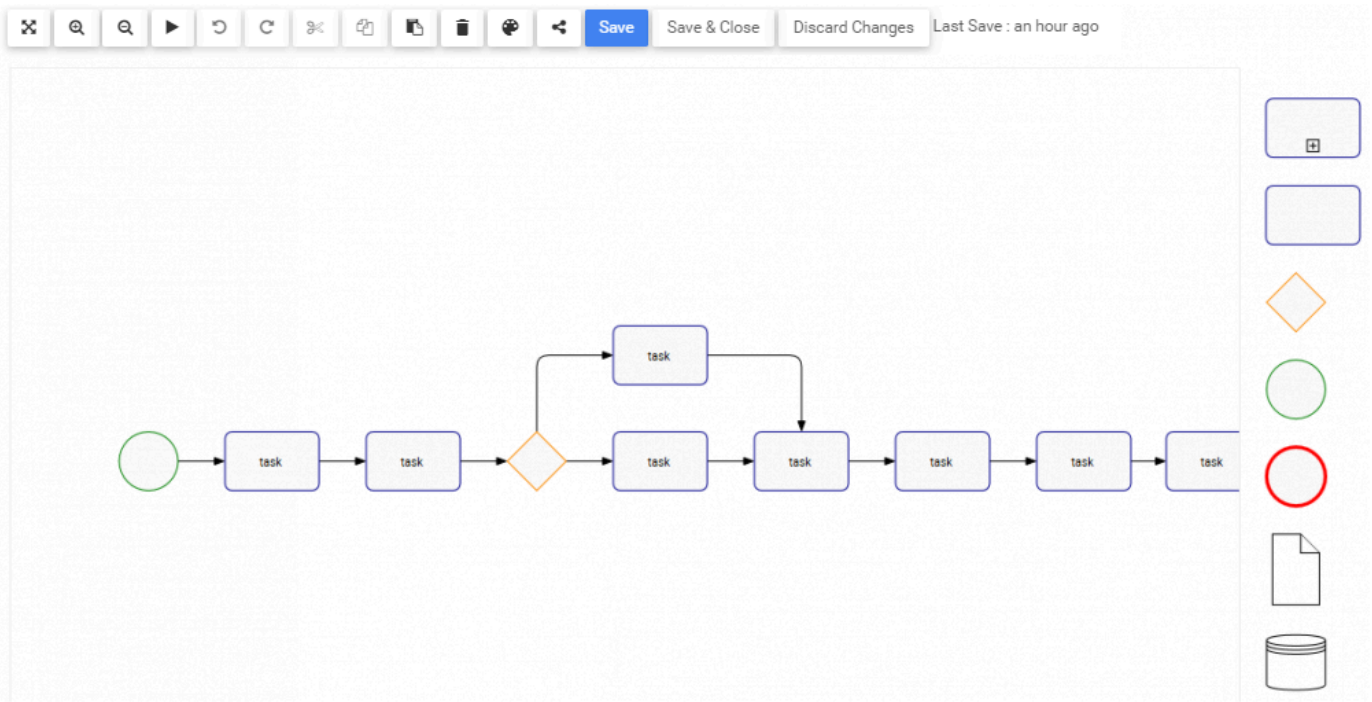
12.2.2.2.7 Move a Process Map

Web Modelers can move a process to create more space on the mapping canvas. This function is mostly used when Web Modelers are mapping large processes and need to drag the entire process map to navigate through it.

To Move a Process Map, please follow the instructions.

Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

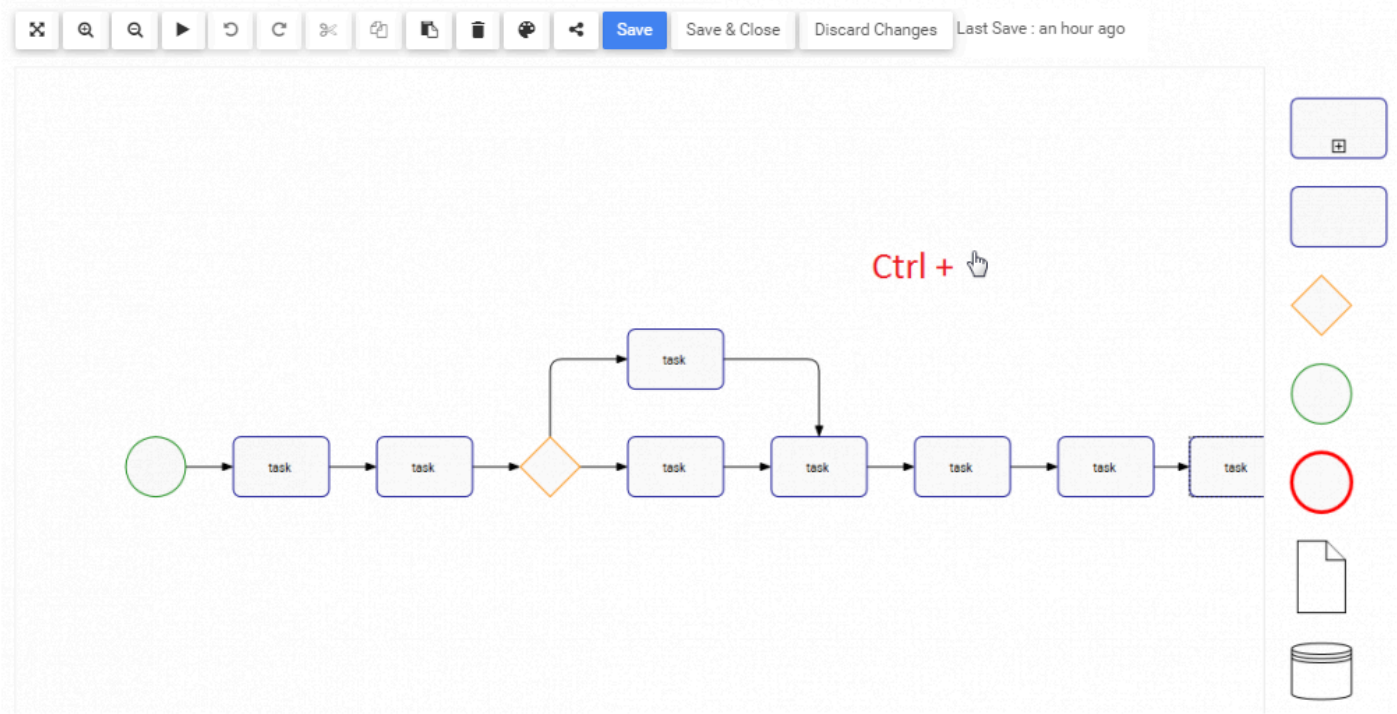
1. Navigate to Full Screen Edit Mode, after clicking on Edit Button



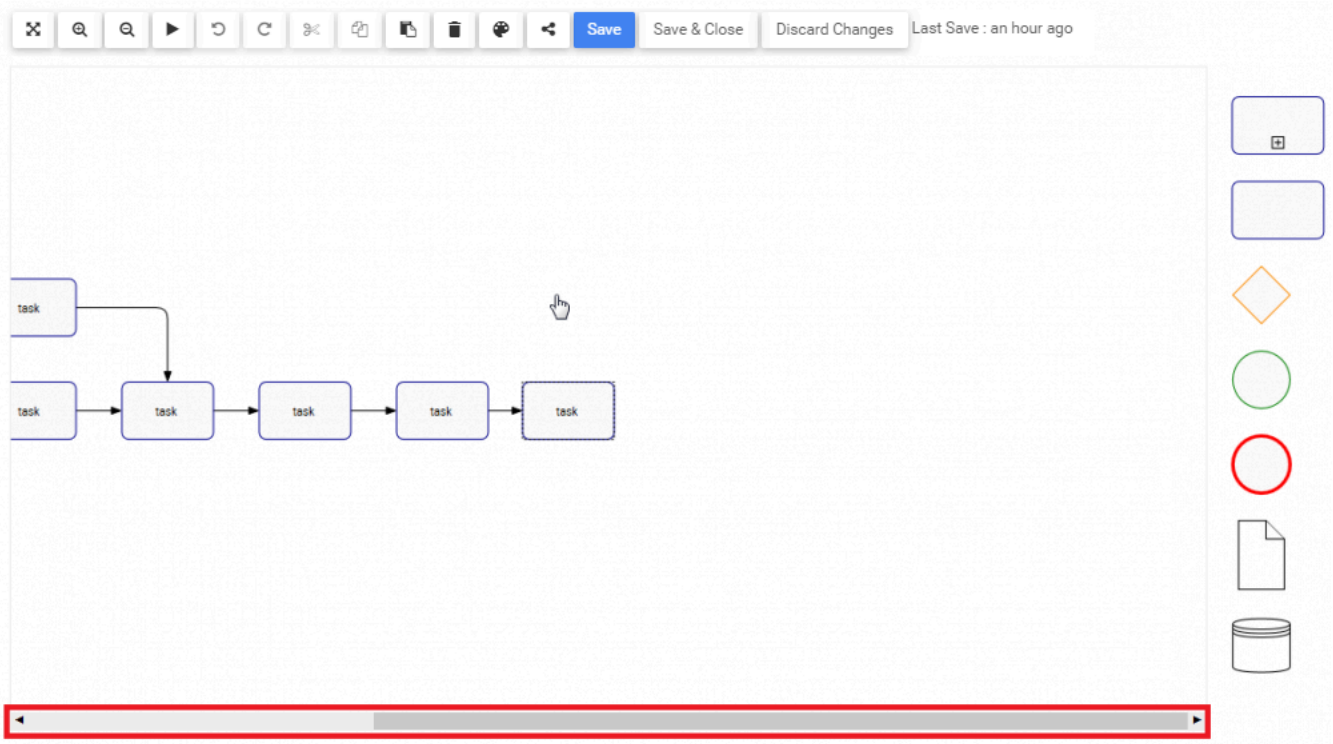
This process is large. The Web Modeler needs more space on the canvas to continue mapping

2. Select the **Ctrl** key on your keyboard, and right-click anywhere on the screen

Web Modeler can right-click on the process map or anywhere on the screen

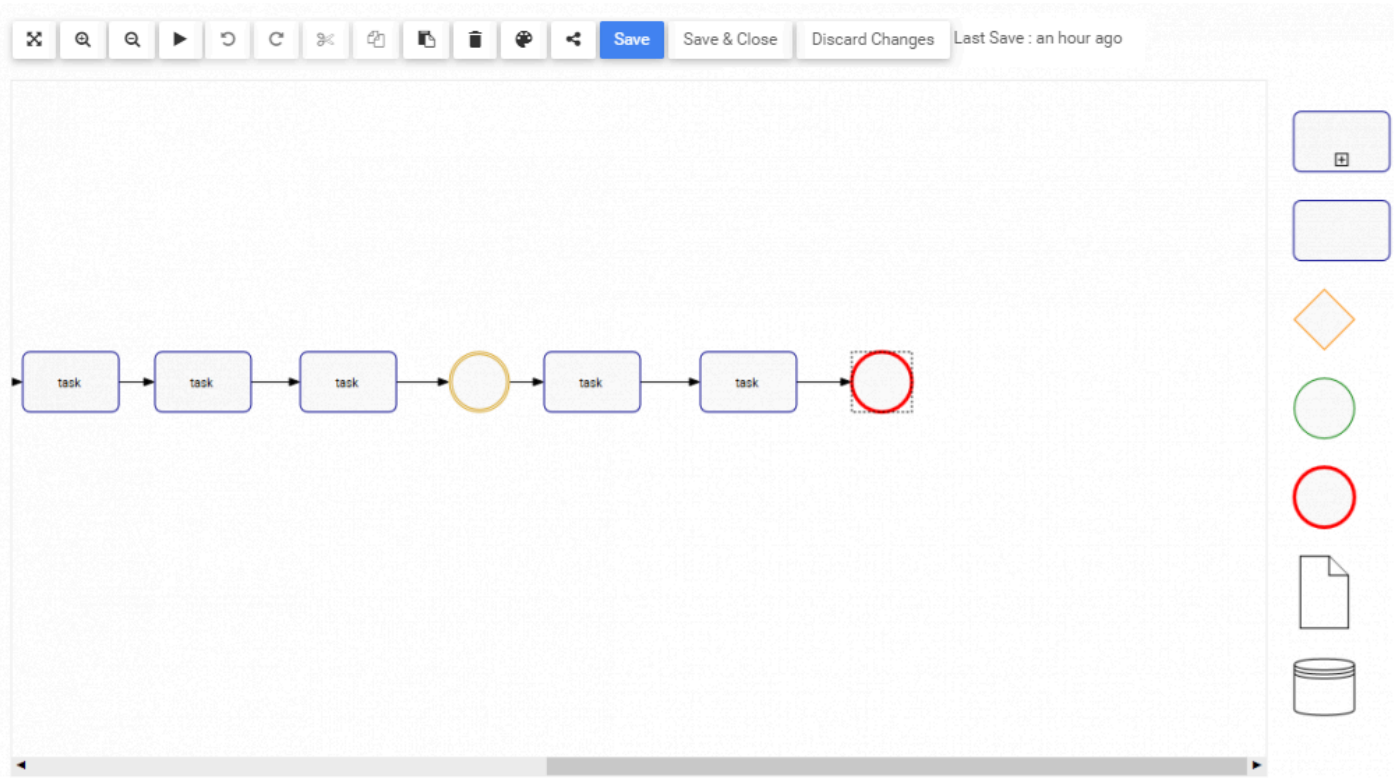


3. Hold the **Ctrl** key and hold the right-click on your mouse, and move the process map around. In this example, move the process map to left

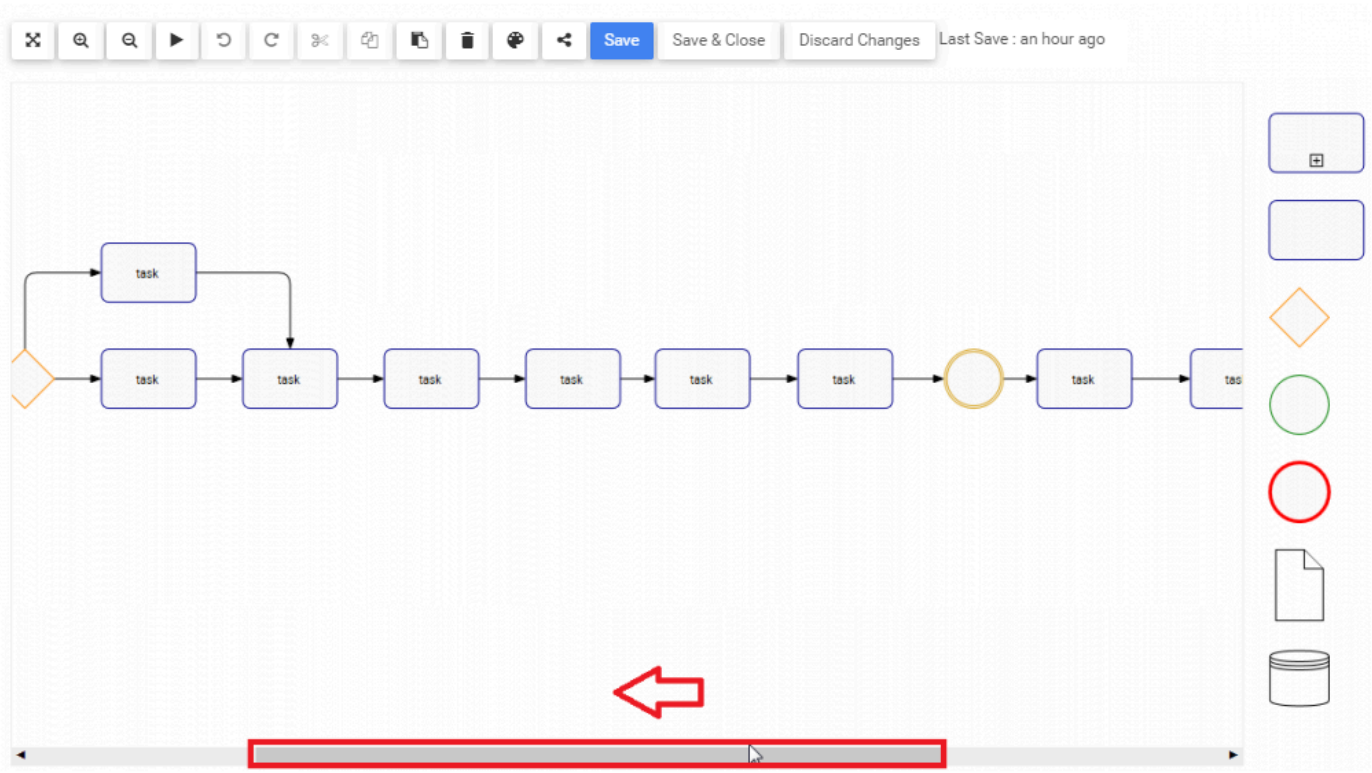


As you move the process map, the mapping canvas will expand, and a scroll-bar will appear on the screen.

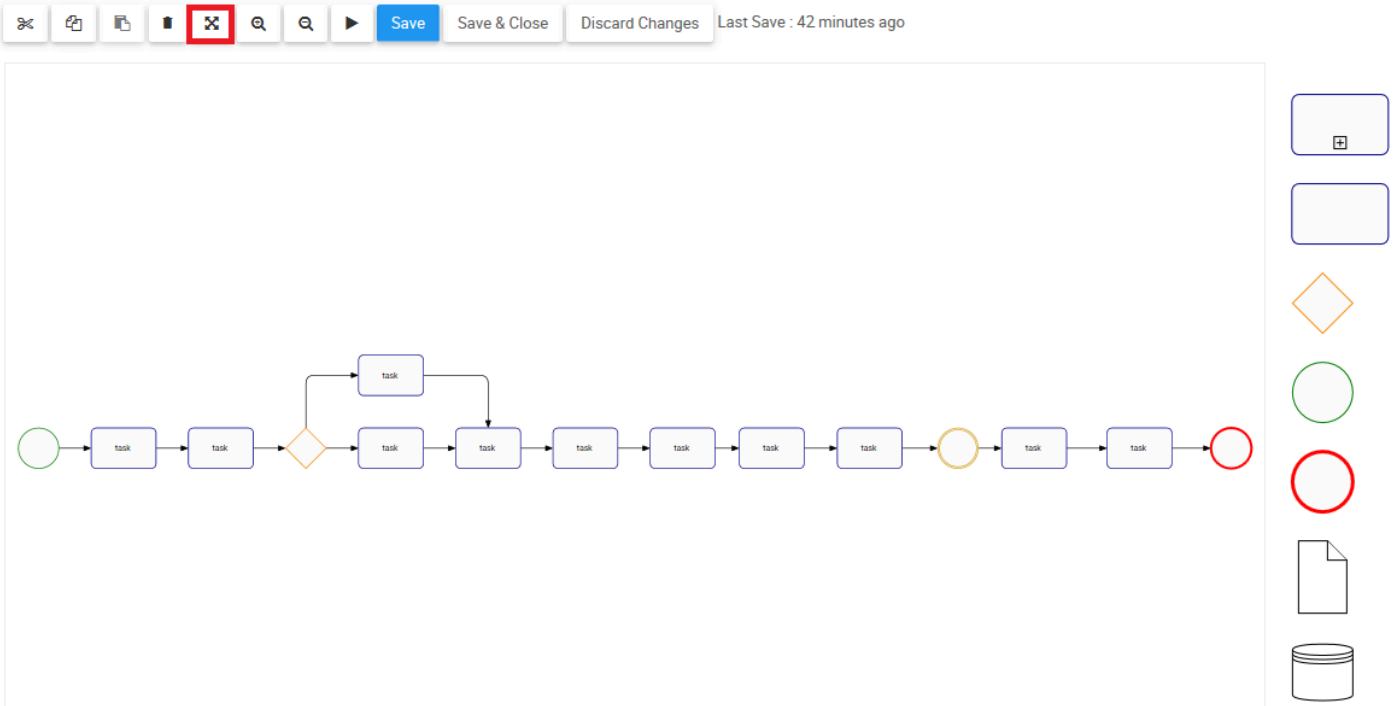
4. Finish mapping the process



5. Use the scroll-bar, and move it to the left to view other objects in the process



6. Use the Fit Screen button to view the entire process map



12.2.2.2.8 Reroute a Flow

The Reroute function allows Web Modelers to optimize the route of a flow in a process map.

Users have 3 Options to Reroute Process Flows. Users can

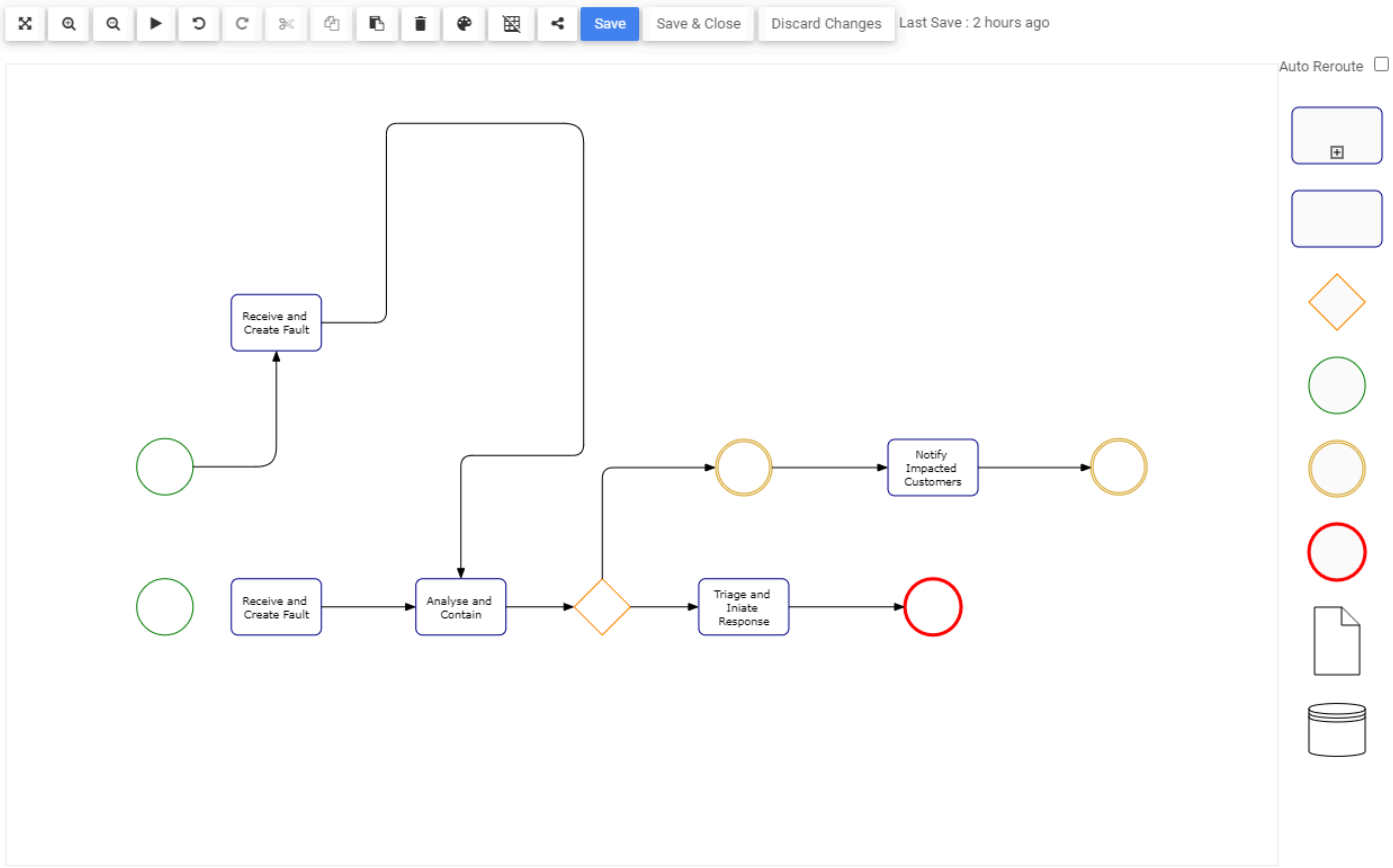
1. Manually Re-Route Process Flows
2. Auto-Layout Process & Flows
3. Use the Re-Route Feature

12.2.2.2.8.1 Manually Re-Route Process Flows

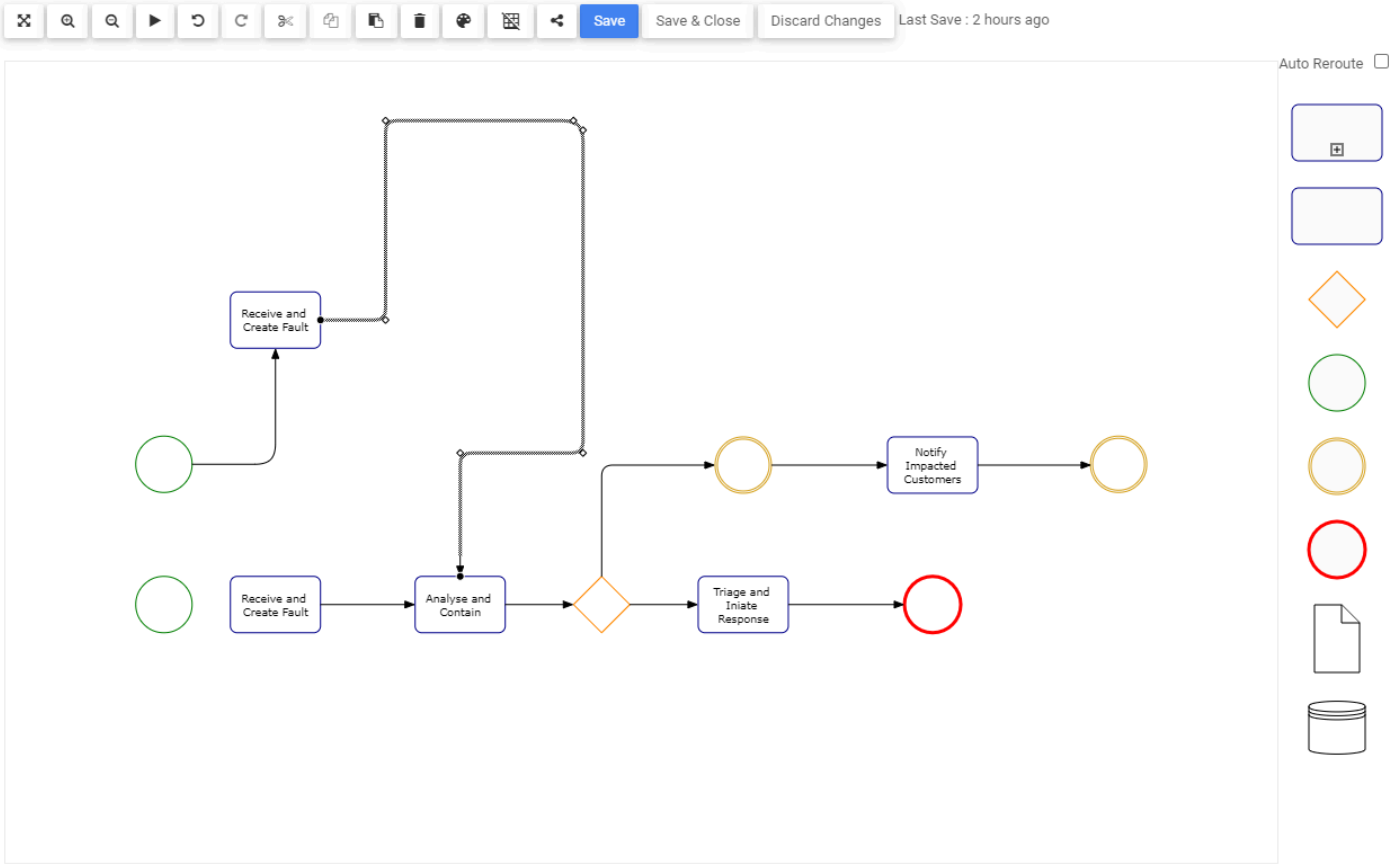
Users can Manually Re-Route Process Flows to customize and organize their process maps.

To reroute a flow object while keeping the initial location of your ports, please follow the instructions.

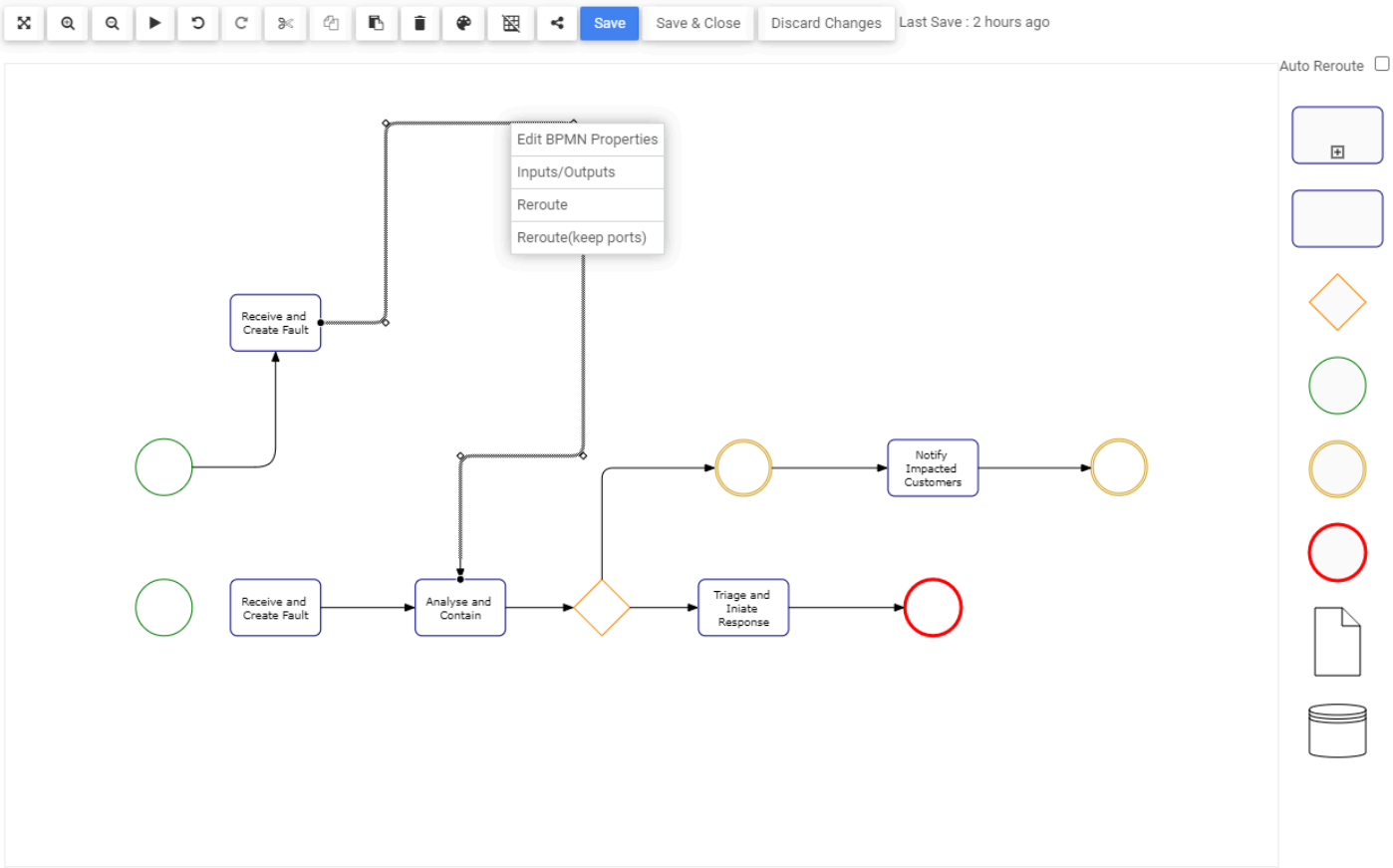
1. Navigate to Full Screen Edit Mode, after clicking on Edit Button



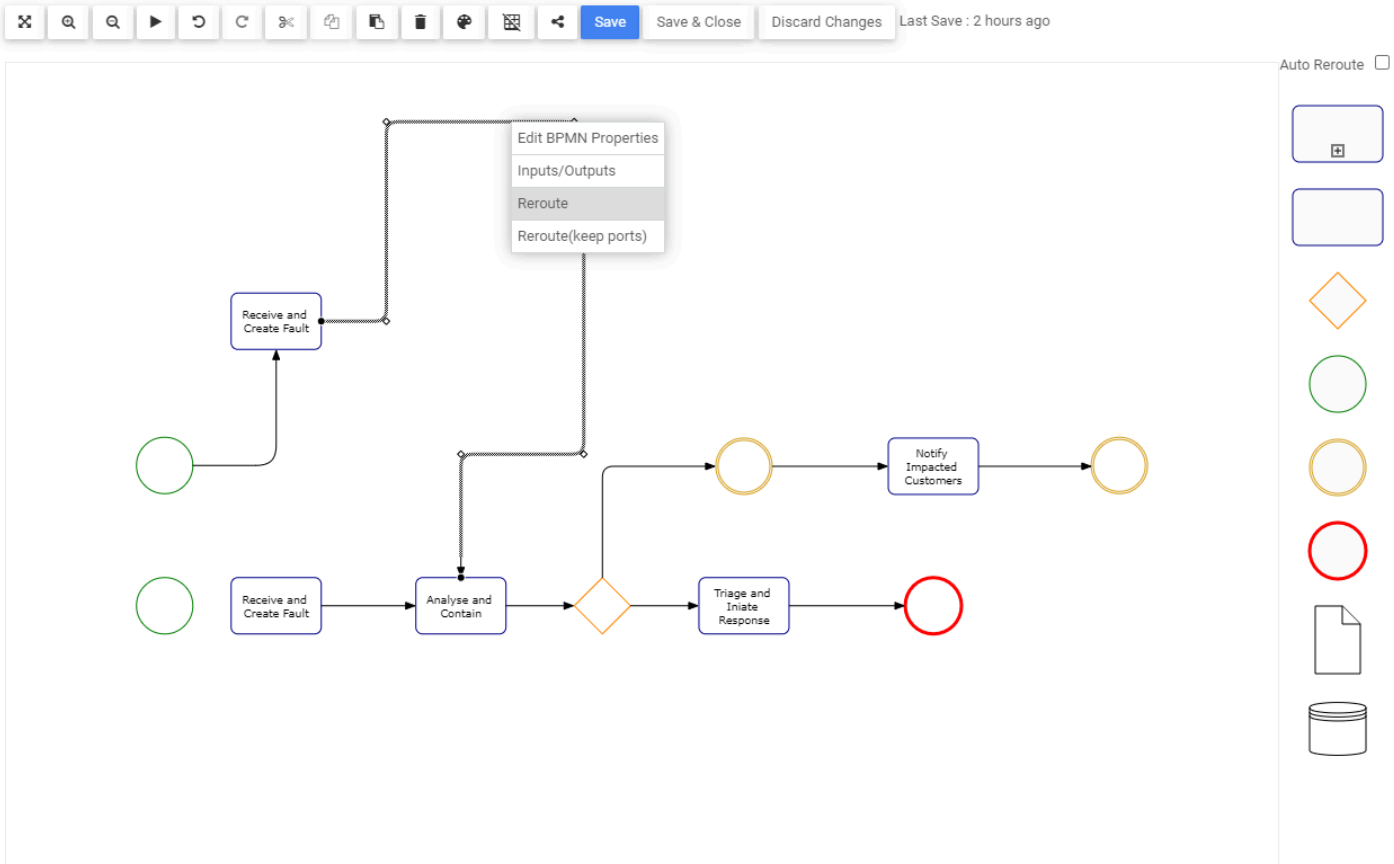
2. Select the Flow you want to Reroute



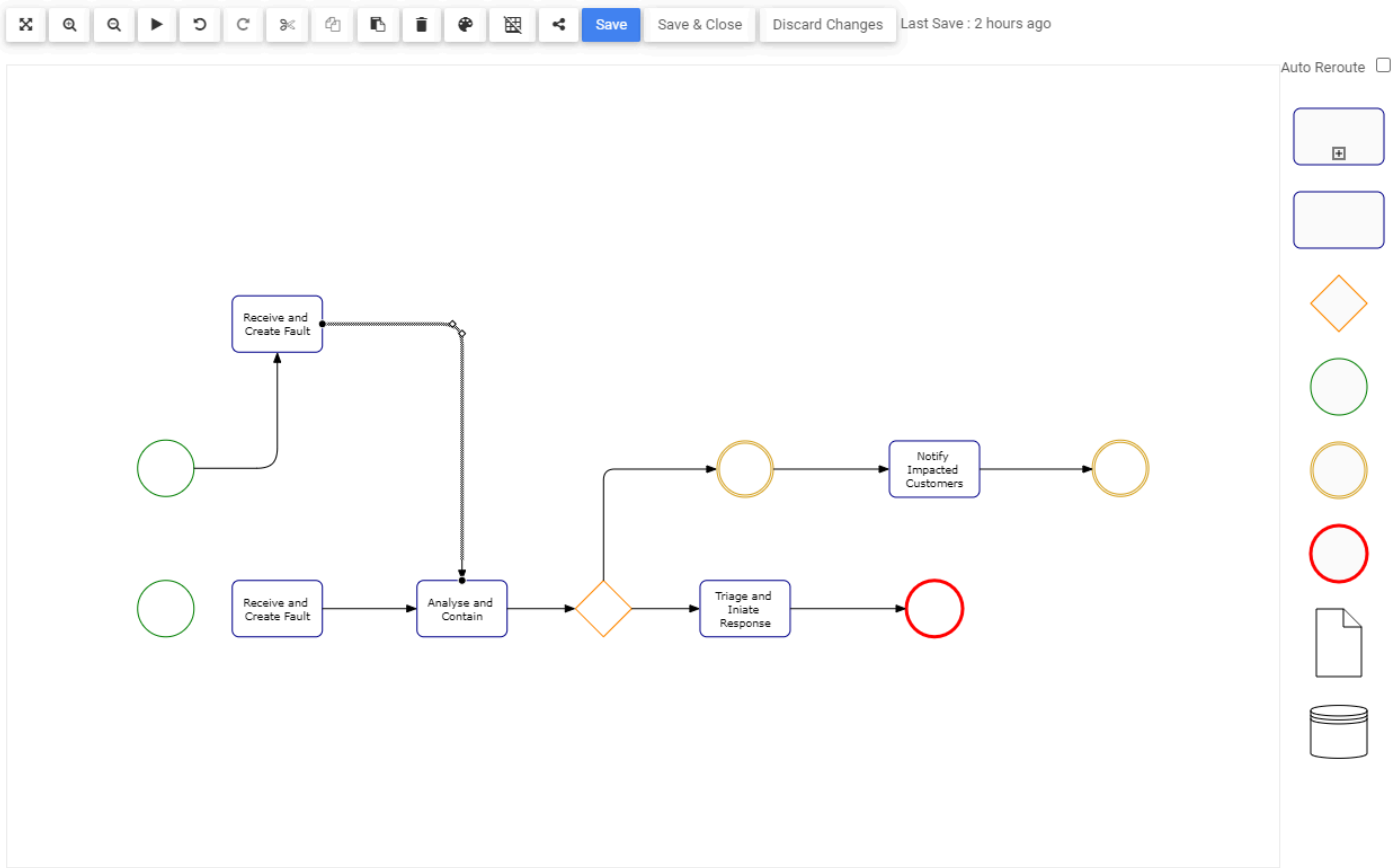
3. Right-click on the Flow. A drop-down menu will be generated



4. Select the “Reroute” box

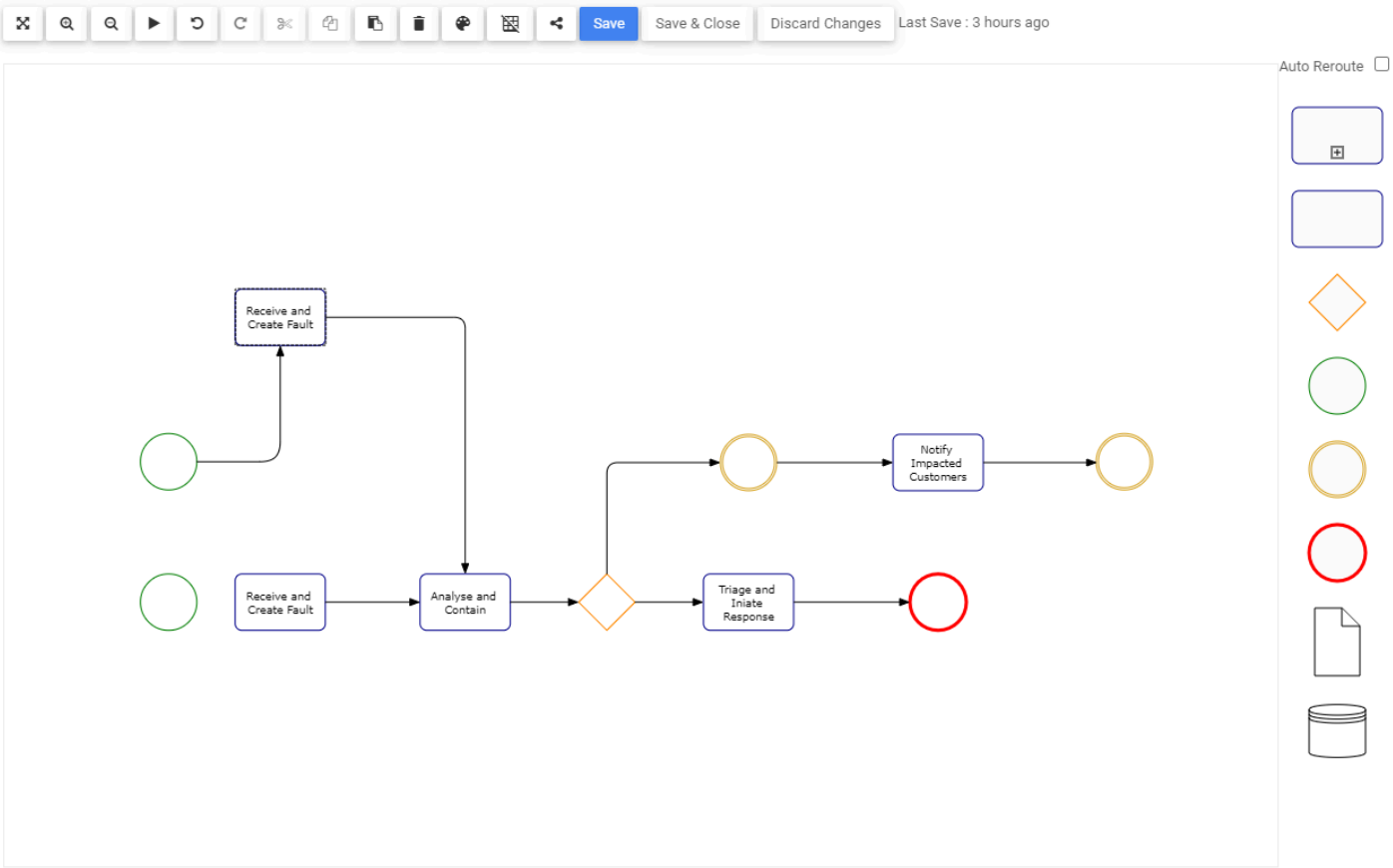


5. The route of the Flow will be optimized

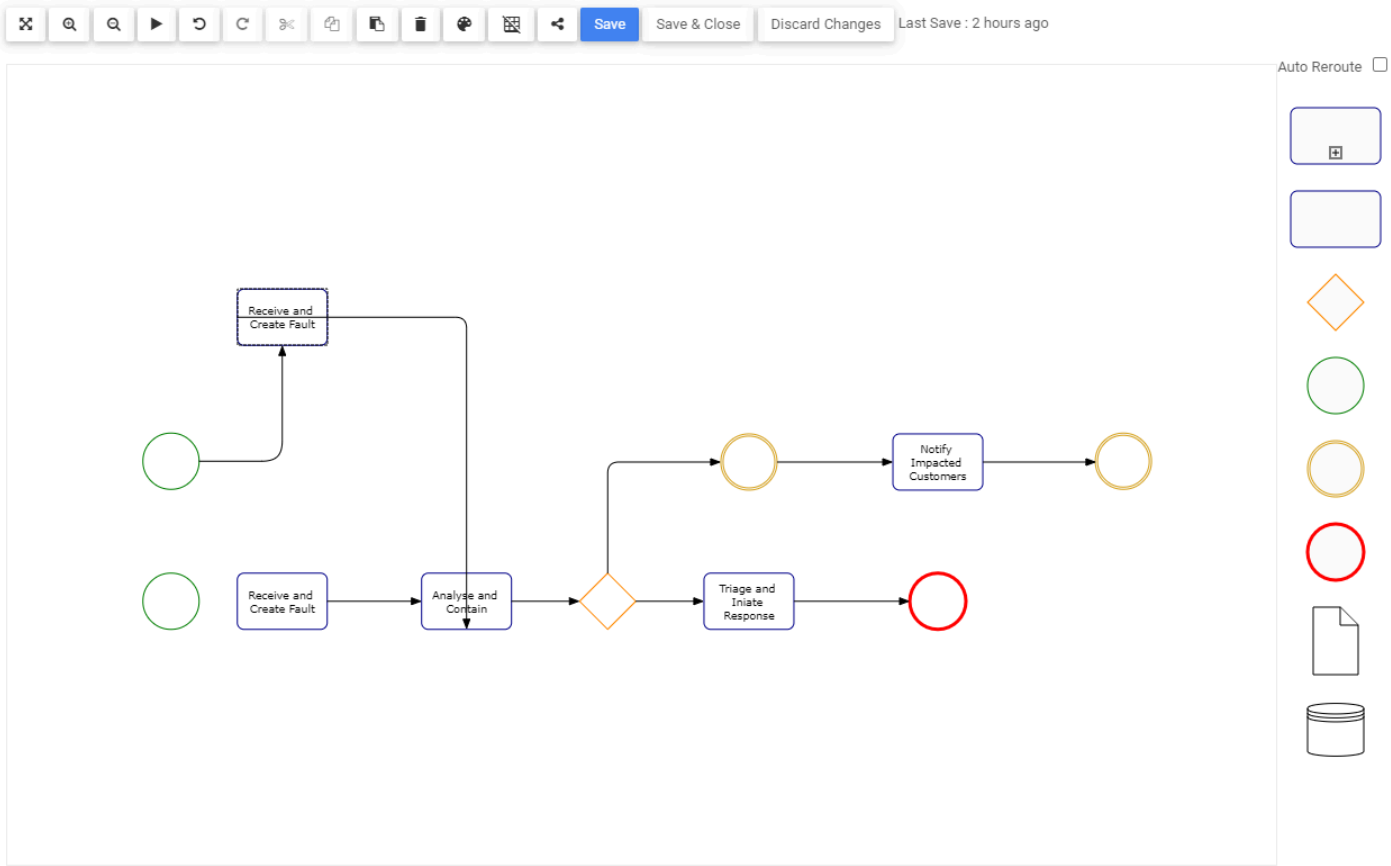


To reroute a flow object and adjusting the transitions based off the new location of the ports, please follow the instructions.

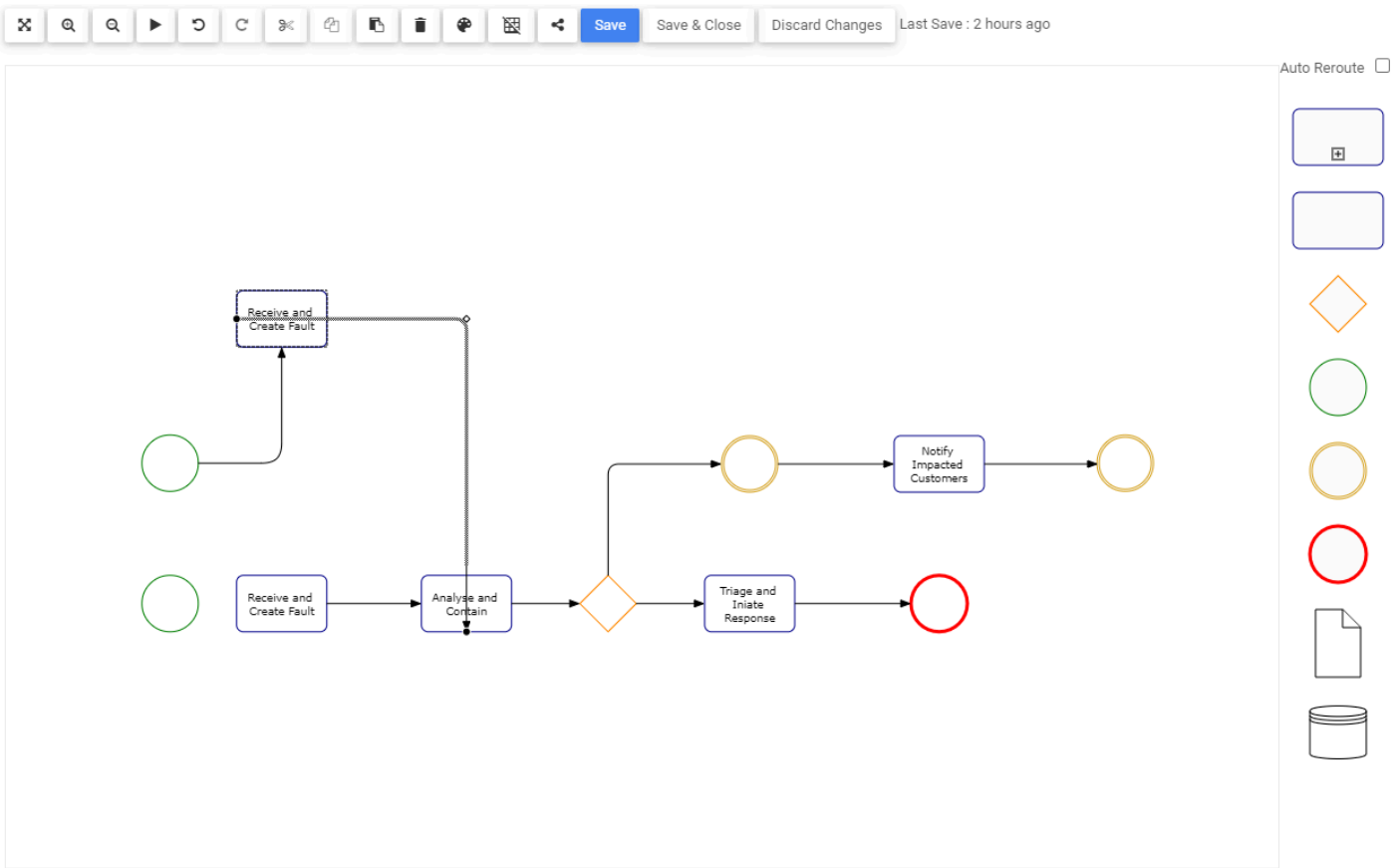
1. Navigate to Full Screen Edit Mode, after clicking on Edit Button



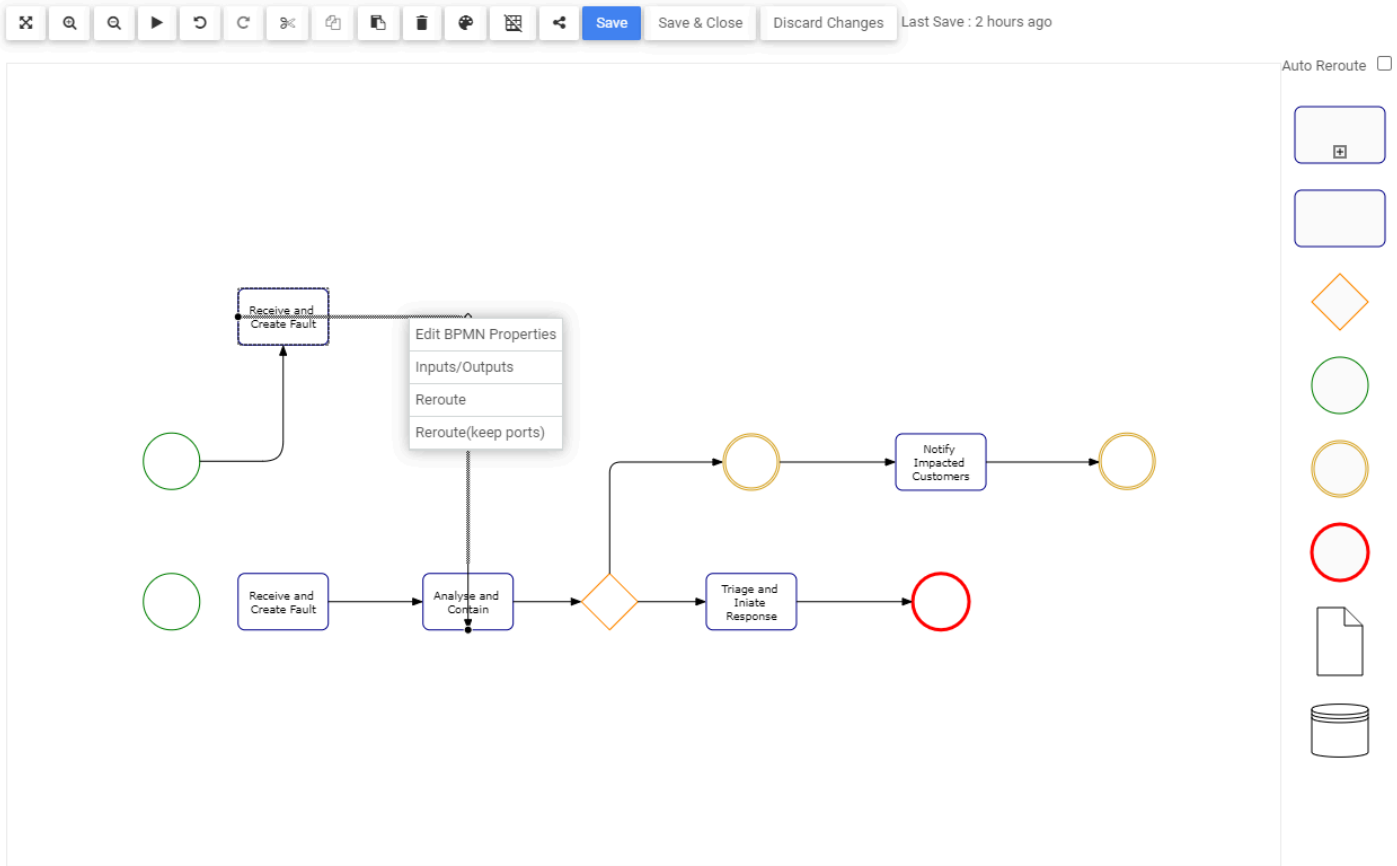
2. Change the location of the ports



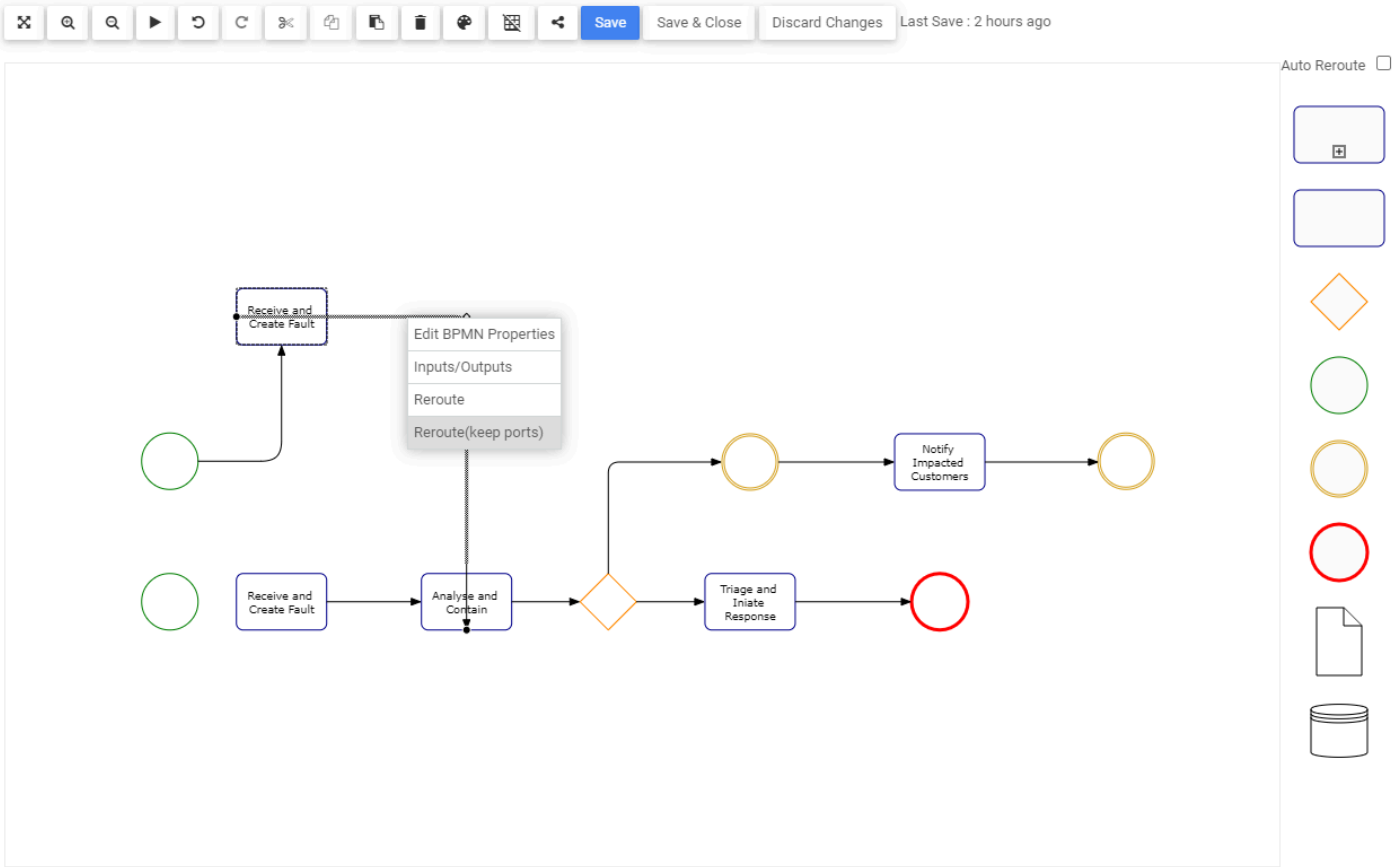
3. Select the Flow you want to Reroute



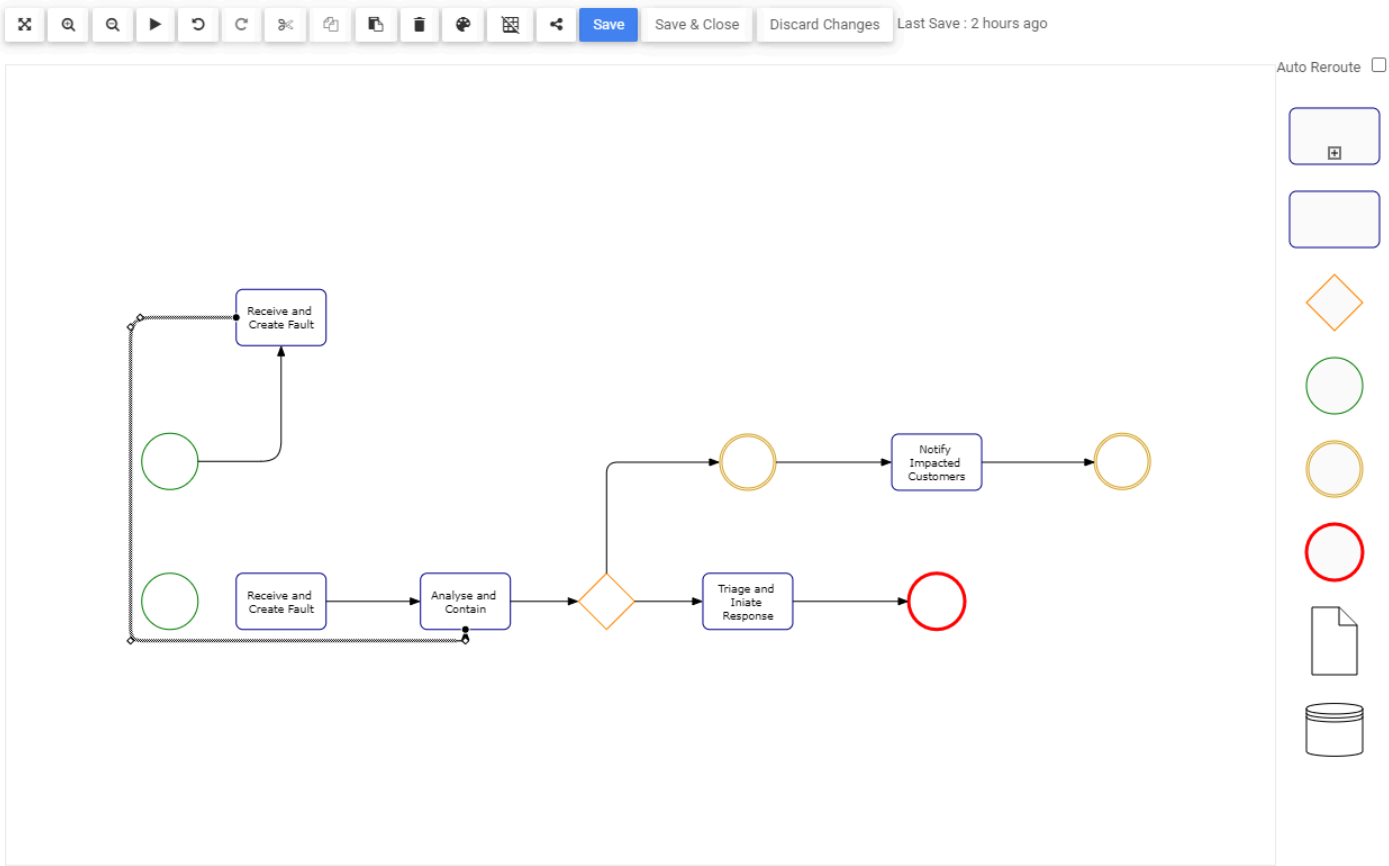
4. Right-click on the Flow. A drop-down menu will be generated



5. Select the “Reroute” box



6. The route of the Flow will be optimized

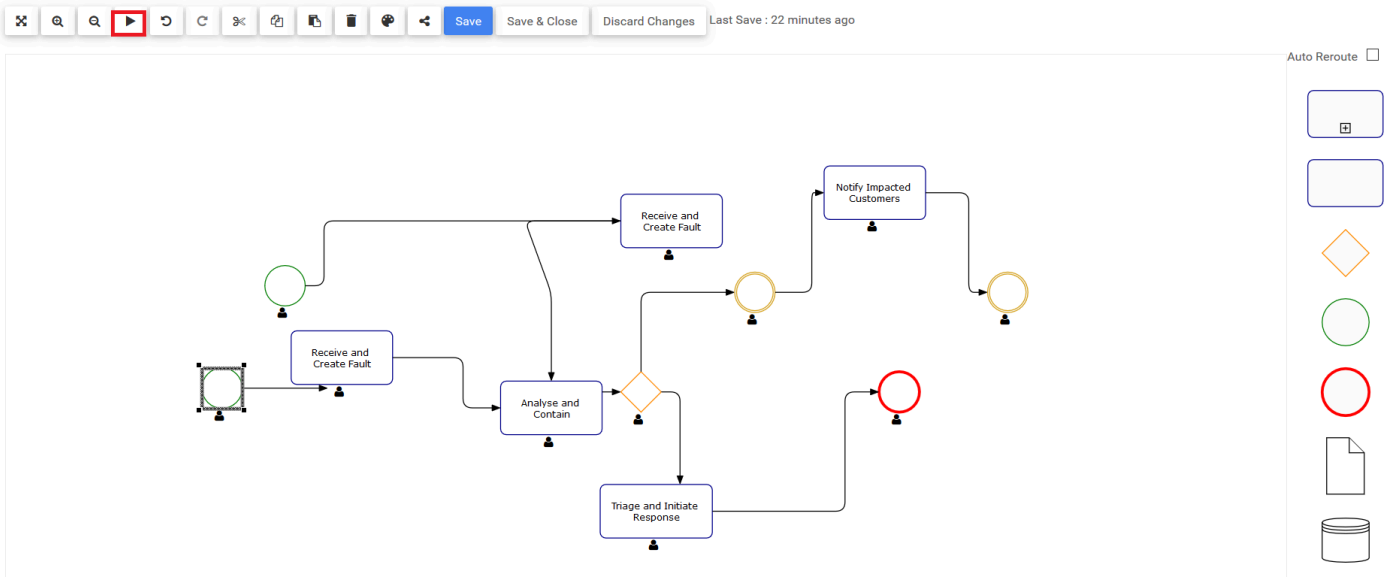


Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

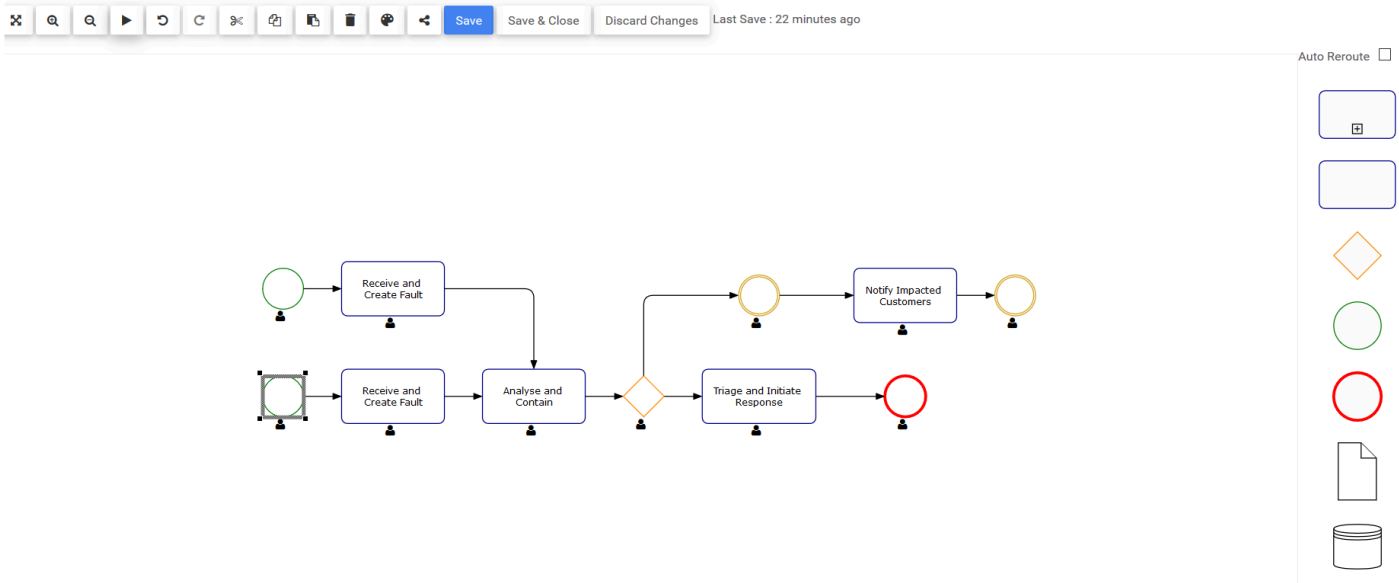
12.2.2.2.8.2 Auto-Layout Process and Flows

Users can re-organize their processes using the Auto-Layout feature available within Process Maps.

Users can re-organize their maps by clicking on:



The auto-layout feature will re-organize process maps using EPC's algorithm and logic, automatically cleaning up process maps.

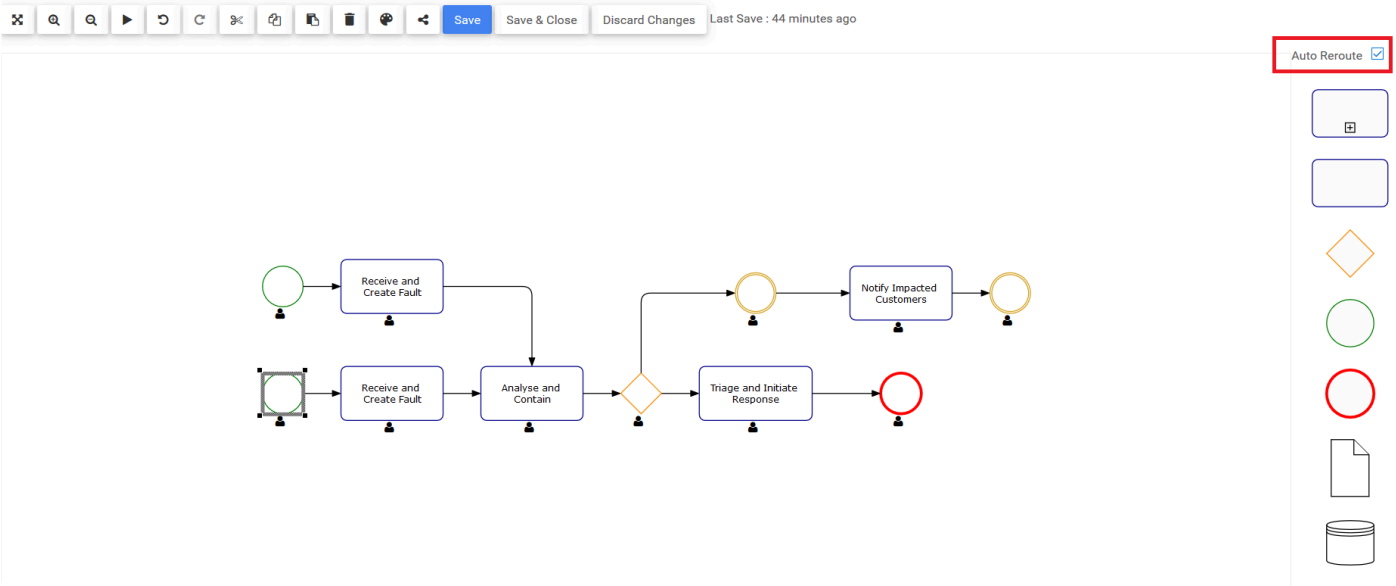


12.2.2.2.8.3 Auto Re-Route Feature

Users have the ability to Auto Re-Route their process flows, allowing the EPC to automatically re-route all flows within a process map, implementing both the most optimal and most logical path for these flows the follow. If enabled, the Auto Re-Route Feature will automatically re-organize process flows when:

1. Users add and manipulate flows
2. Users move objects in process maps

To enable the Auto Re-Route feature please check the “Auto Reroute” checkbox in the process map edit window. Your preference will be saved.



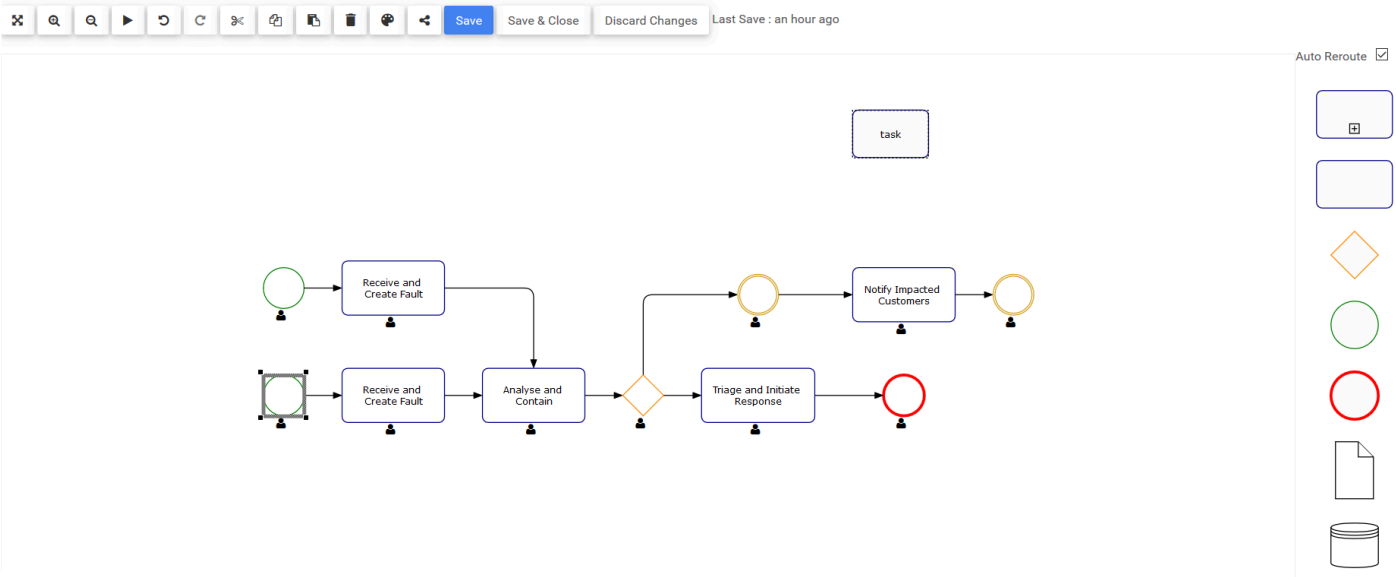
12.2.2.2.9 Delete Shapes and Flows

Web Modelers can delete shapes and flows from the map using the Delete Button on the edit Toolbar or the “Delete” key on the keyboard.

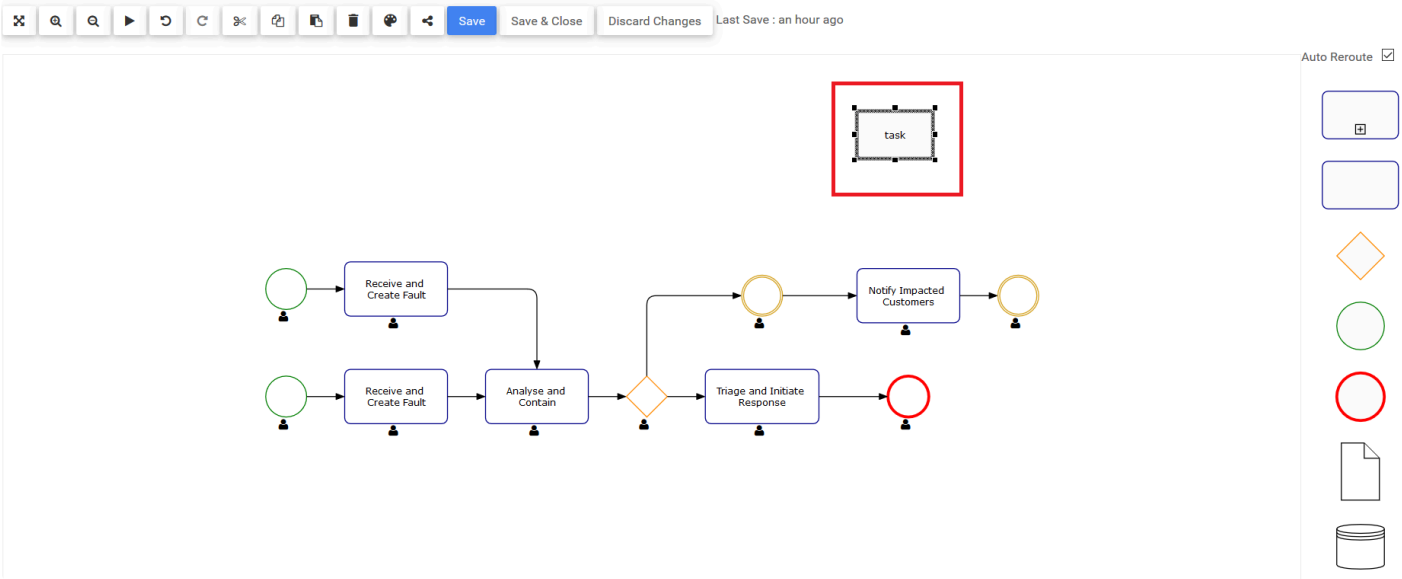
To Delete Shapes or Flows, please follow the instructions.

> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

1. Navigate to Full Screen Edit Mode, after clicking on Edit Button

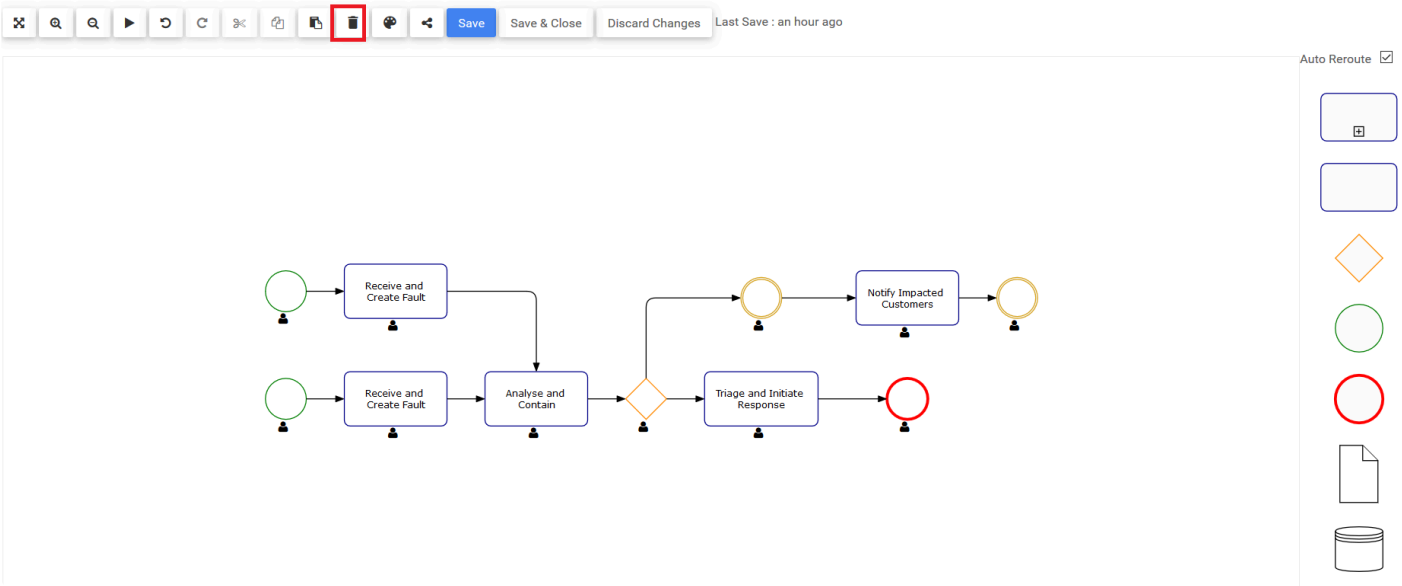


2. Select the shape or flow you want to delete. In this example, select a task.



3. To the delete a shape or flow, use the button on the toolbar or the “Delete” key on your keyboard.

> The task will no longer be on the process map. It will be no longer appear in the new version once you save the process.



> If you unwillingly deleted a flow object and want to revert the changes since the last save, click “Cancel”.

12.2.2.2.10 Associate Objects to Shapes

As process mappers and viewers, information richness improves overall understanding of the maps. One important aspect of this is visual information.

Web Modelers can associate objects to shapes display the flow of data through a process map.

The Associate Objects to Shapes section covers the following:

1. Associate Documents to Artifacts
2. Associate Assets to Data Stores

12.2.2.2.10.1 Associate Documents to Artifacts

As process mappers and viewers, information richness improves overall understanding of the maps. One important aspect of this is visual information.

For this reason, Web Modelers can add the shape of an Artifact and associate Documents to the shape to display how a document is affected and/or used during the execution of a process map.

Web Modelers can associate one or multiple documents to one Artifact.

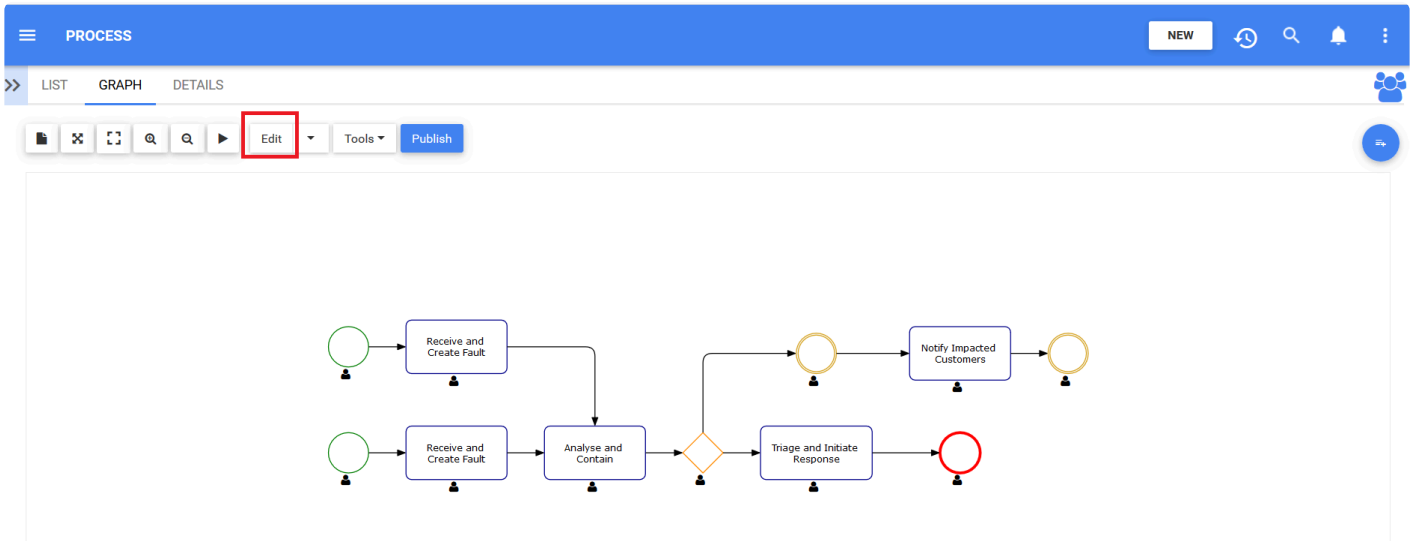
One Document:

Multiple documents:

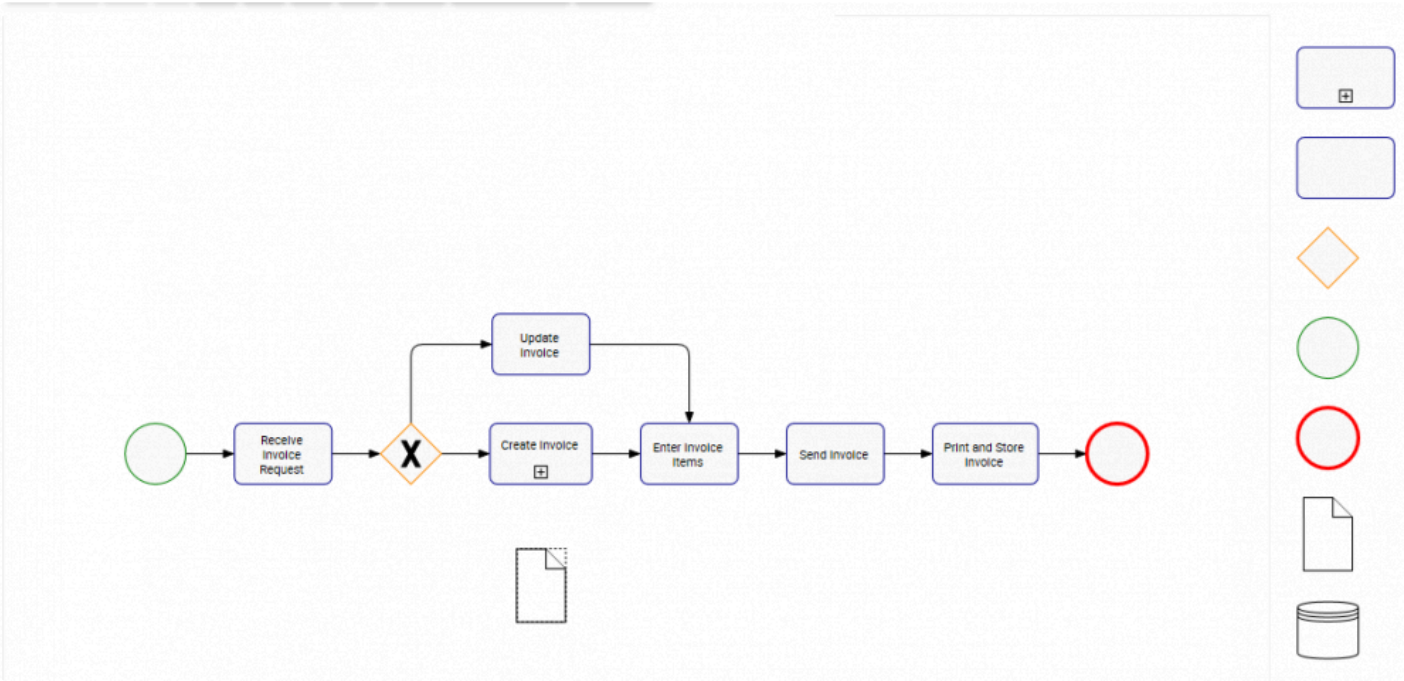
Artifacts are connected to shapes of the process map (Task, sub-process, gateways, events). Transitions can be made to and from the artifact object, meaning it can be a source of can be a target object.

To Associate Document to Artifacts, follow these instructions

1. Navigate to Full Screen Edit Mode, after clicking on Edit Button

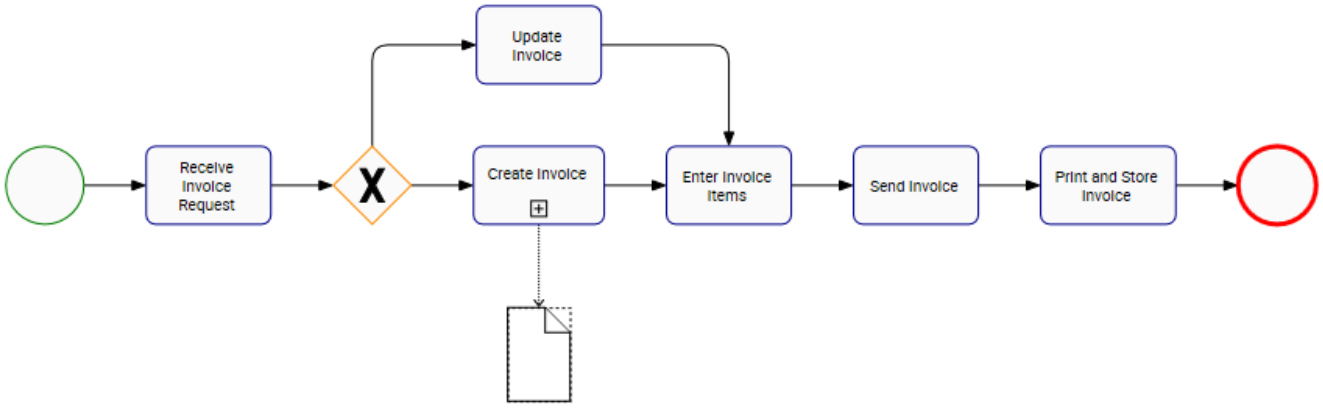


2. Add an Artifact shape to the map

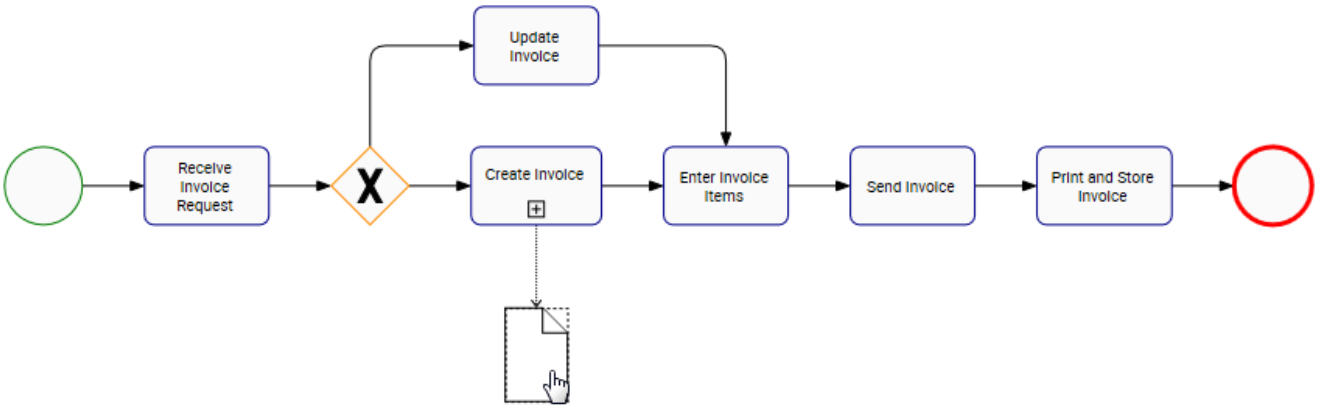


3. Connect the Artifact to a shape in the process map. In this example, add a flow from the sub-process "Create an Invoice" to the artifact

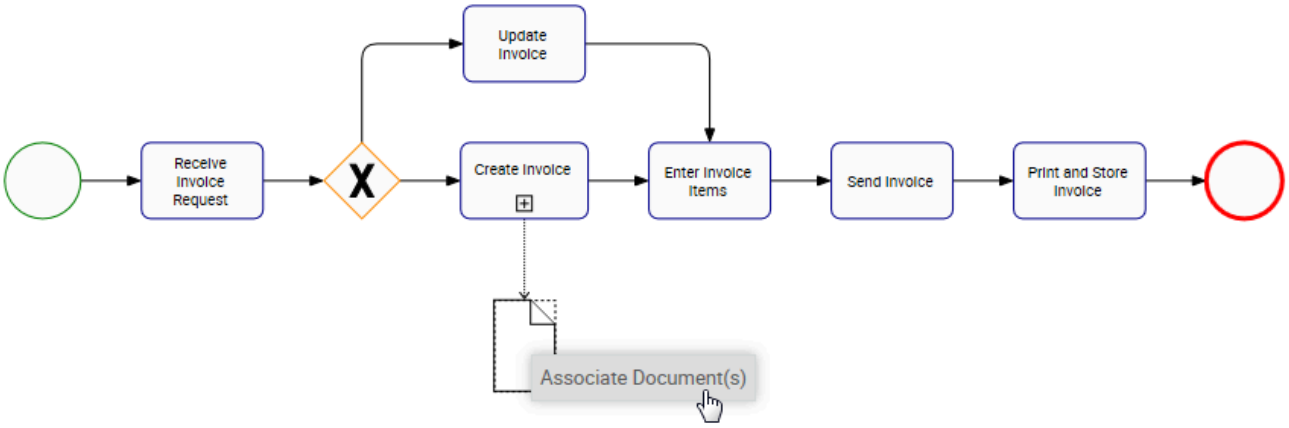
> By default, the transition type is Directed Association, and cannot be modified



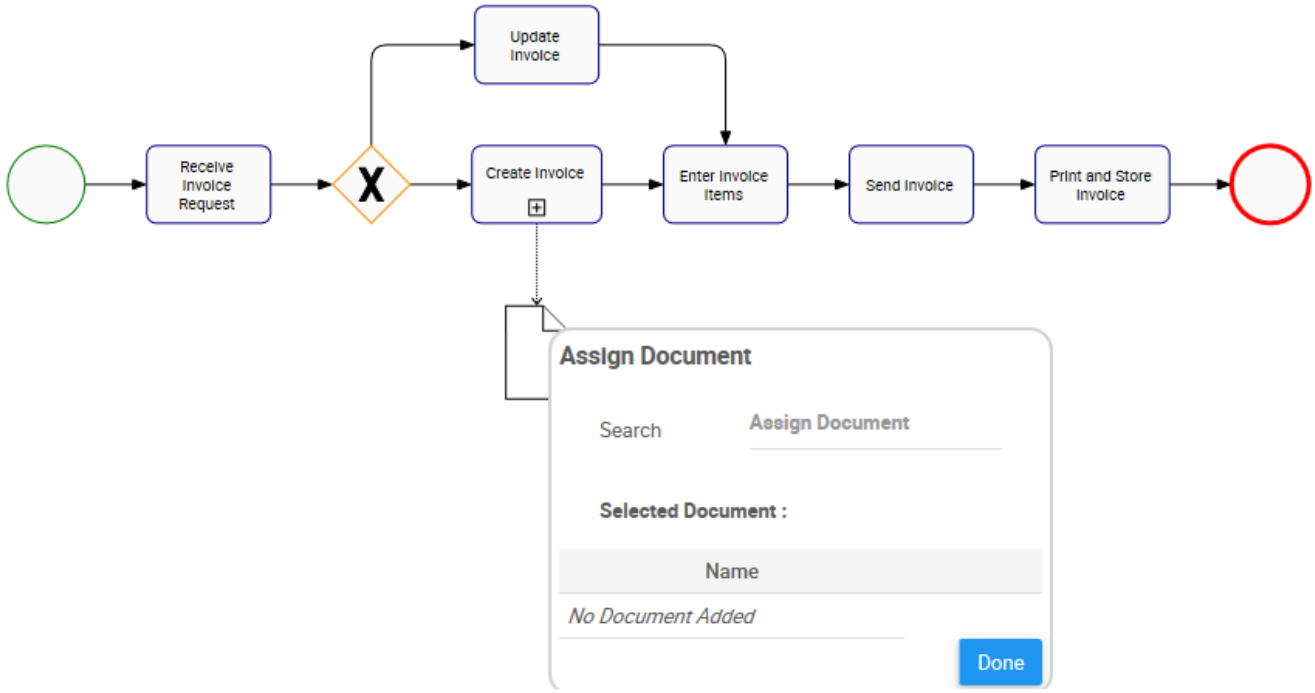
4. Navigate to the Artifact shape



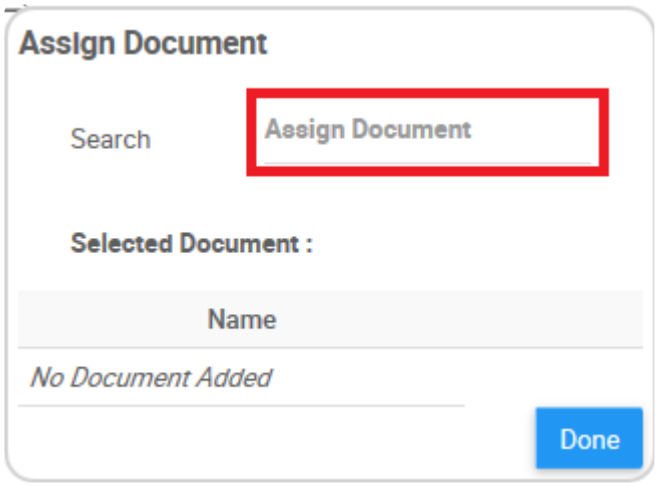
5. Right-click on the Artifact and choose the “Associate Document(s)” box



6. A pop-up will be generated allowing you to assign documents to the Artifact

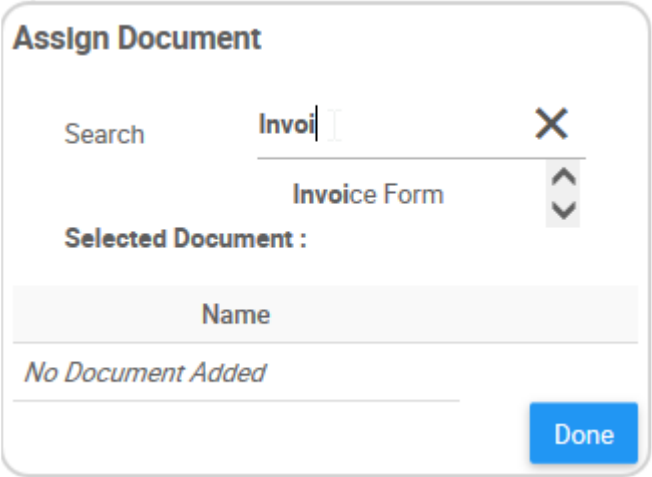


7. Navigate to the “Search” field

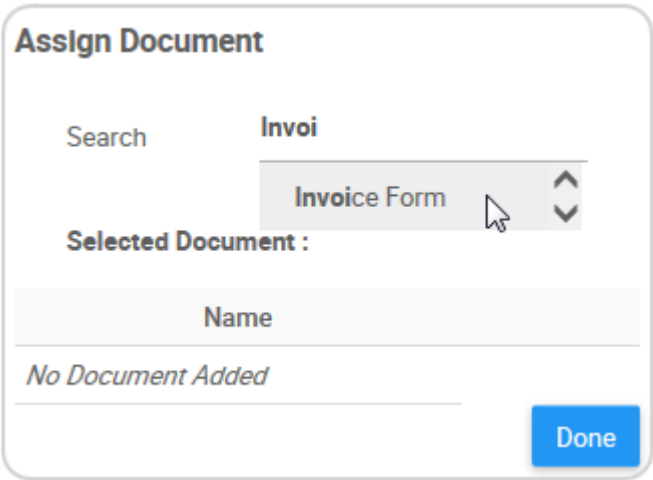


8. Type the name of the Document

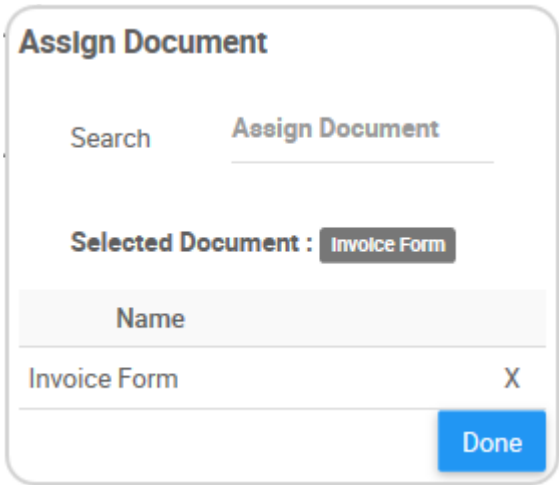
> The list of suggestions will populate based on key word typing



9. Select the document you want to add to the Artifact. In this example, the document is “Invoice Form”

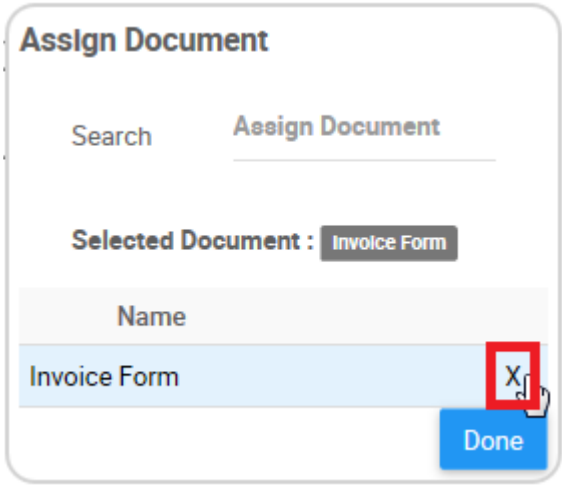


10. The Document “Invoice Form” will be on the table

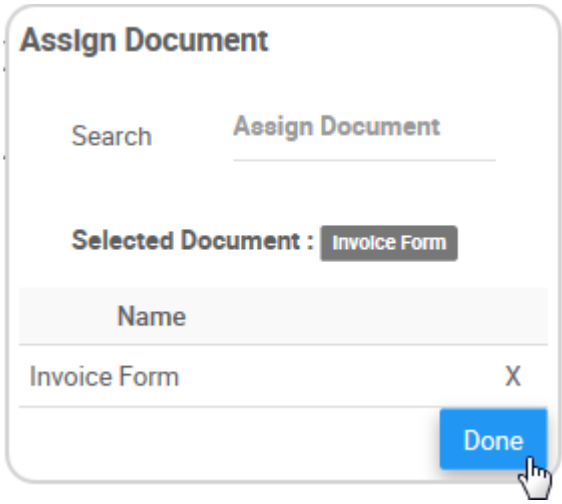


To assign multiple documents, repeat steps 7-10

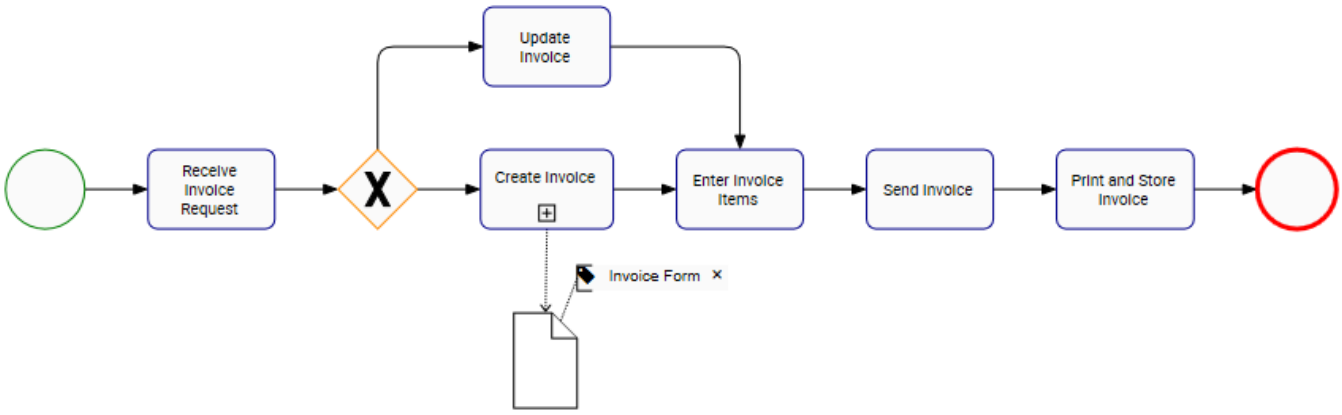
11. Click on the “X” to remove the Document from the Artifact



12. After assigning the Document to the Artifact, click on the Done box to close the pop-up



13. The Document will now associated to the Artifact on the process map. The name of the Document will be displayed inside of an annotation



12.2.2.2.10.2 Associate Assets to Data Stores

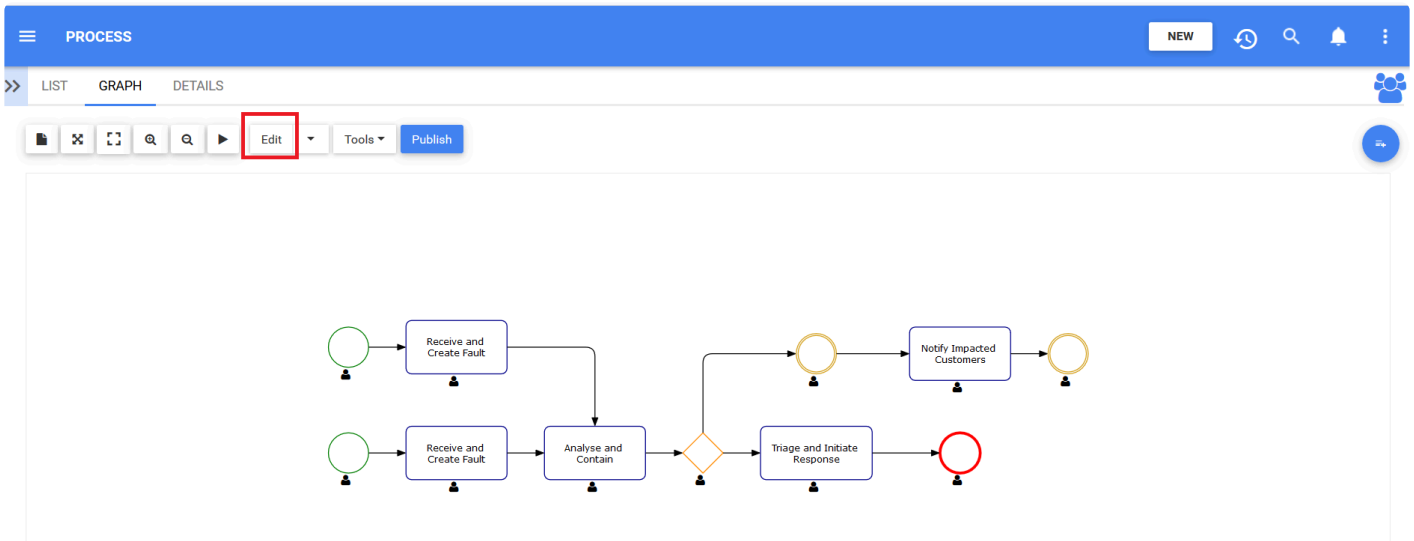
As process mappers and viewers, information richness improves overall understanding of the maps. One important aspect of this is visual information.

For this reason, Web Modelers can add the shape of a Data Store and associate an Asset to the shape to display the transfer of data through a process map.

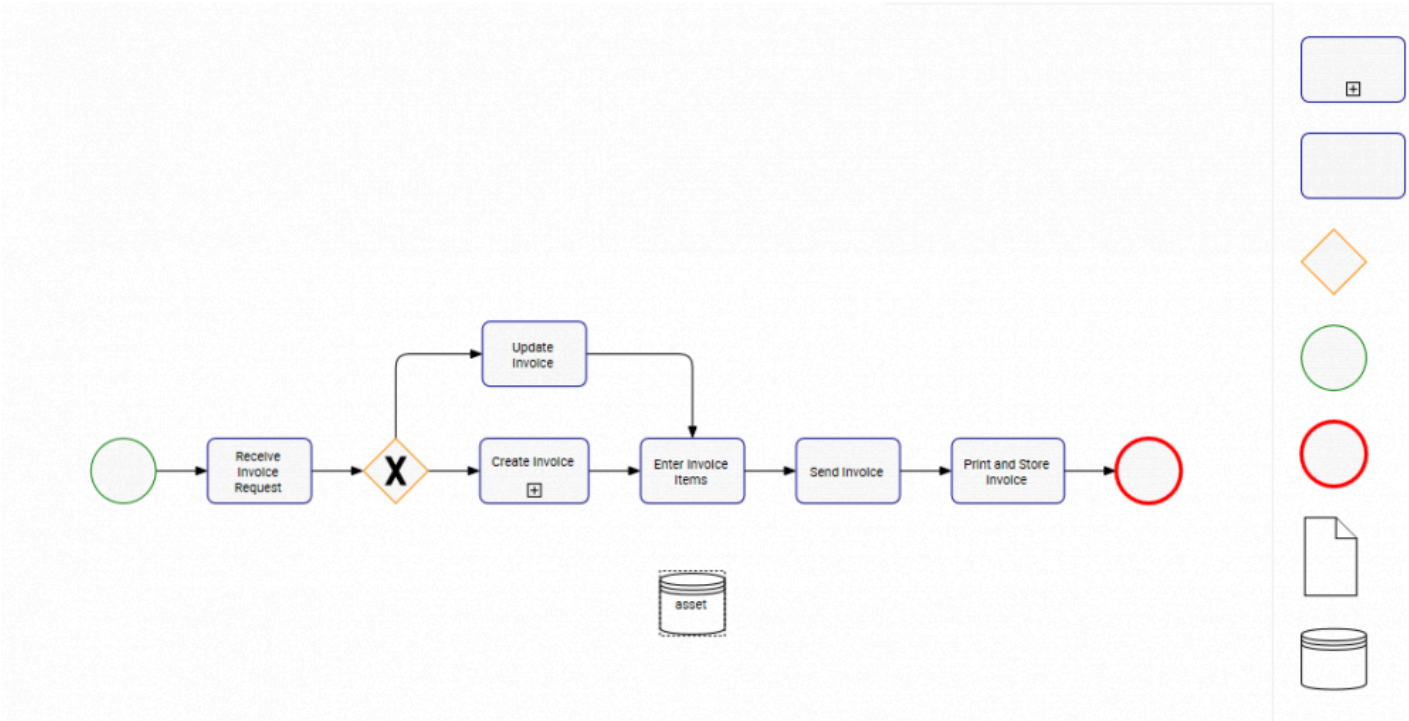
Data Objects are connected to shapes of the process map (Task, sub-process, gateways, events). Transitions can be made to and from the artifact object, meaning it can be a source or target object. Transitions cannot be made between two artifact or data store objects. Data Stores require at least one incoming or outgoing transition from or to a flow object.

To Associate Assets to Data Stores, follow these instructions

1. Navigate to Full Screen Edit Mode, after clicking on Edit Button

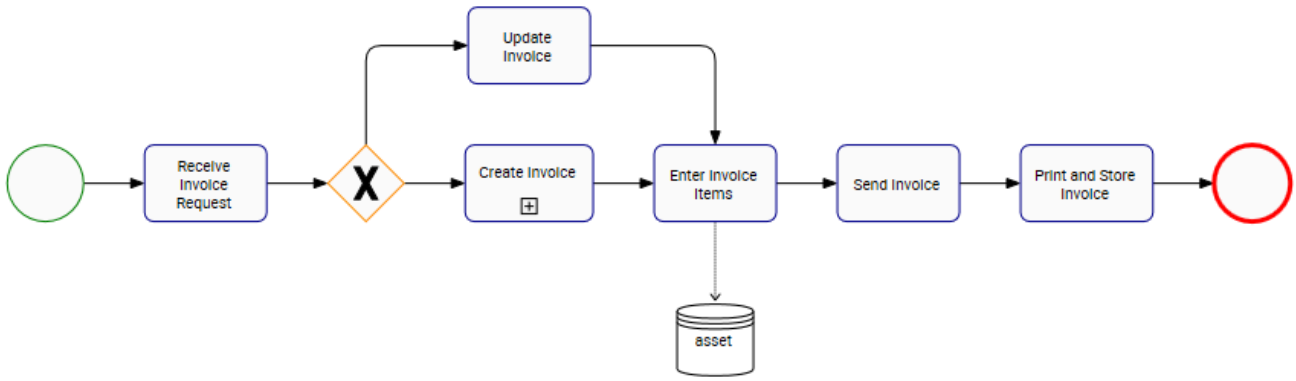


2. Add a Data Store shape to the map

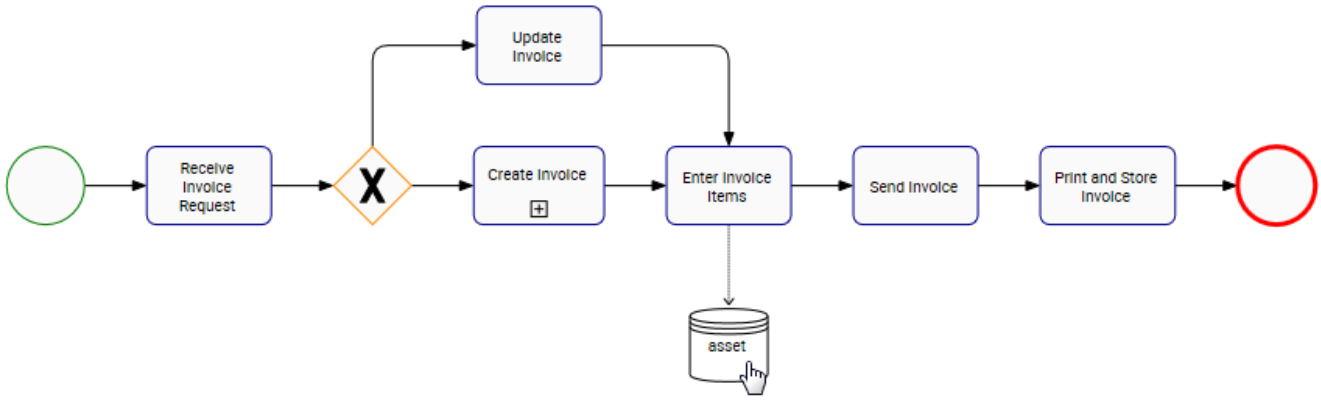


3. Connect the Data Store to a shape in the process map. In this example, add a flow from the sub-process “Create an Invoice” to the Data Store

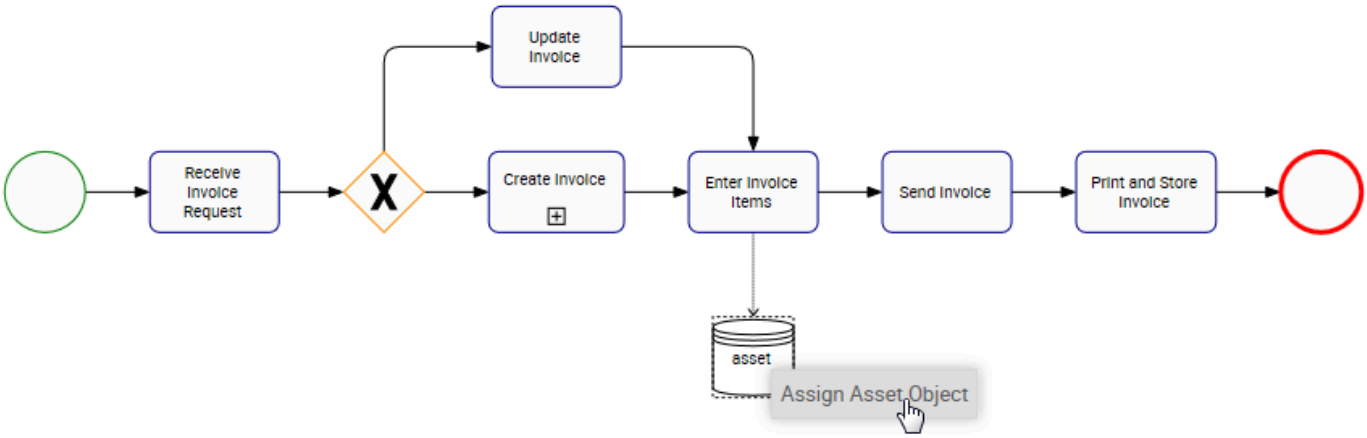
> By default, the transition type is Directed Association, and cannot be modified



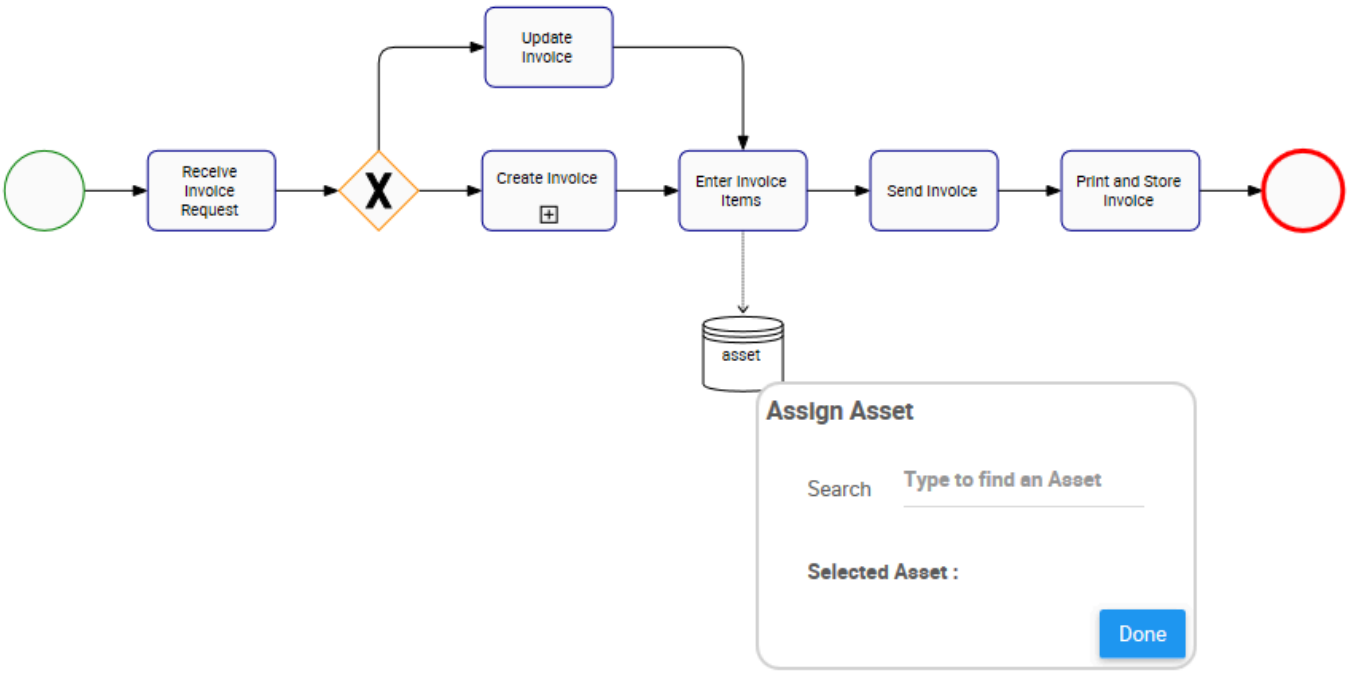
4. Navigate to the Data Store shape



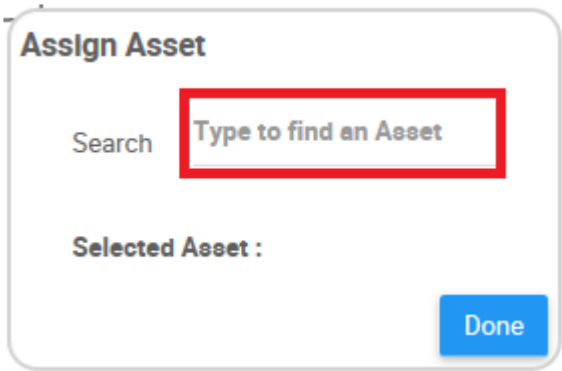
5. Right-click on the Data Store and choose the “Assign Asset Object” box



6. A pop-up will be generated allowing you to assign Assets to the Data Store

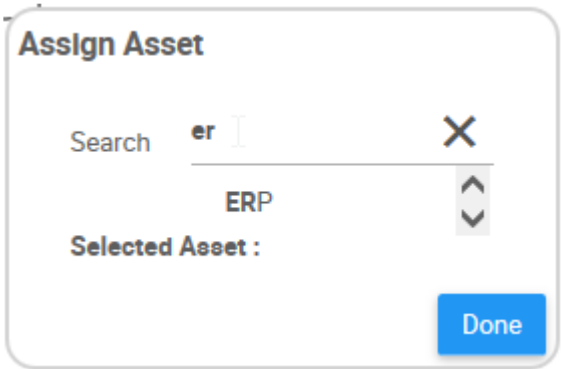


7. Navigate to the “Search” field

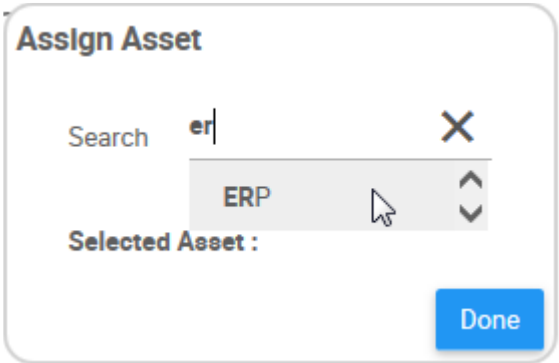


8. Type the name of the Asset

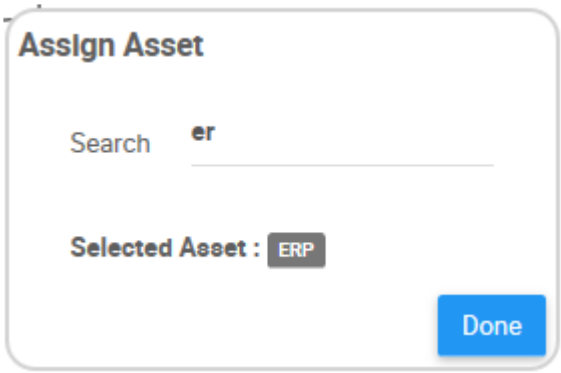
> The list of suggestions will populate based on key word typing



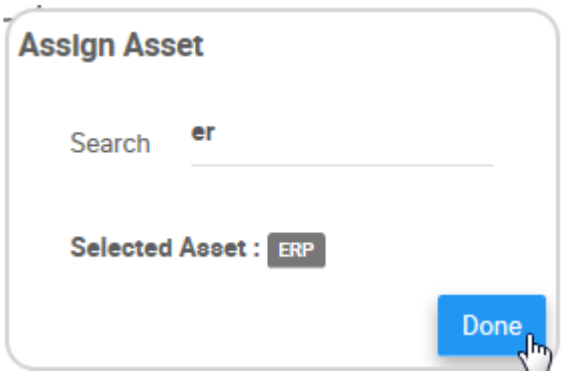
9. Select the Asset you want to add to the Data Store. In this example, the asset is “ERP”



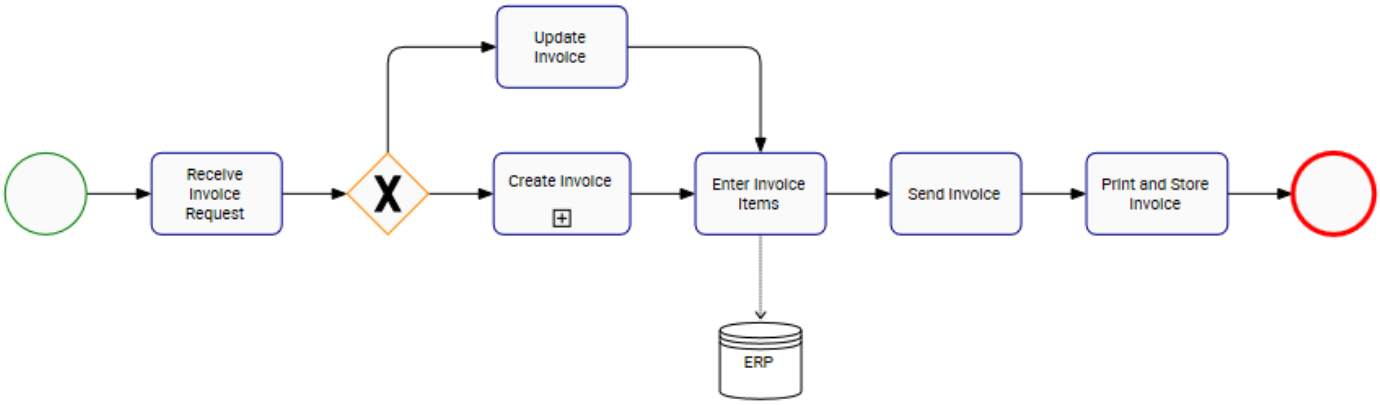
10. The Asset “ERP” will be selected



11. After assigning the Asset to the Data Store, click on the Done box to close the pop-up



12. The Asset will now associated to the Data Store on the process map. The name of the Asset will be displayed inside of the shape



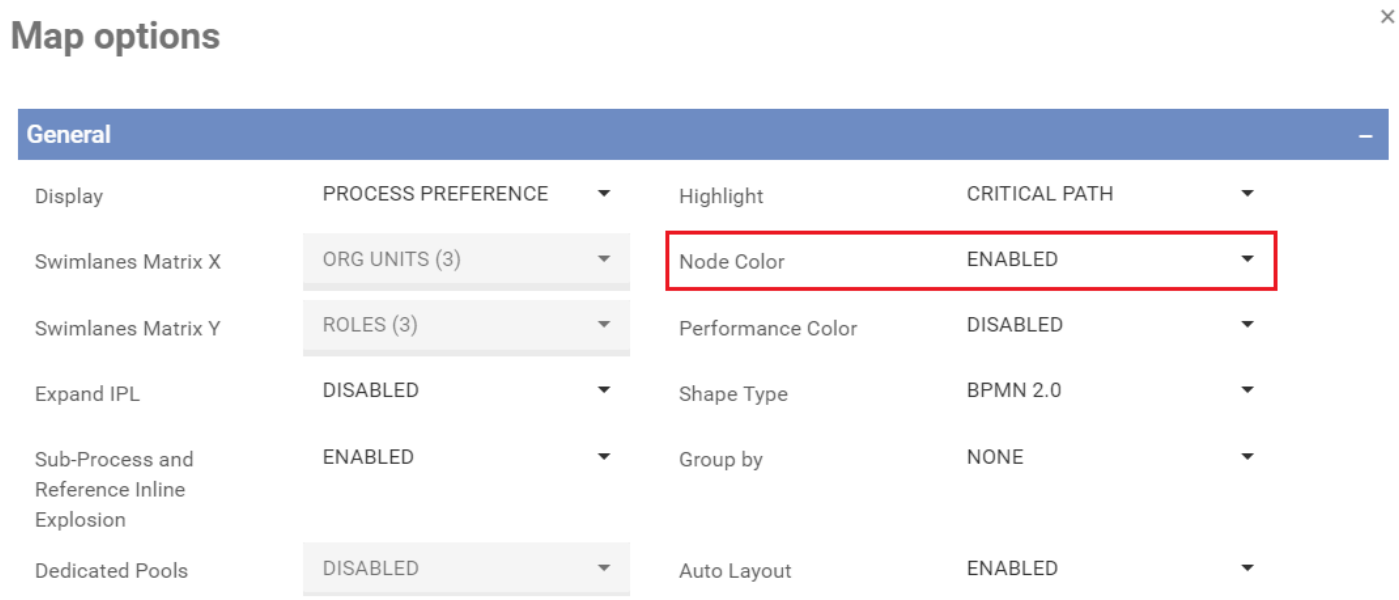
To delete the Data Store, click here.

12.2.2.2.11 Add Node Colors

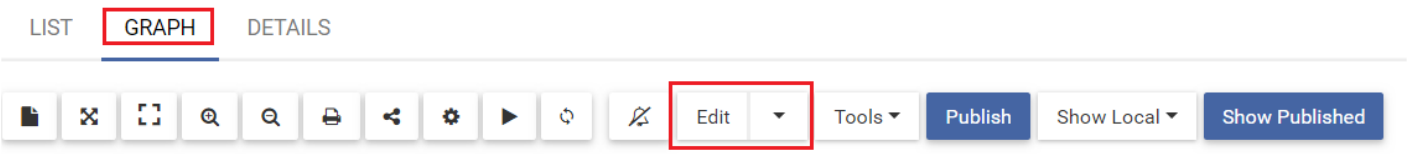
Node colors can be added to maps for a variety of different reasons. One company might have a specific color legend associated to controls or specific roles, while another might use color to distinguish possible paths within a process map. Adding colors to a map adds a visual element that is immediately distinguishable, and allows users to group or specify patterns to flow objects.

Assigning Node Colors

1. Make sure Node Color is enabled in the Map Options. For more information on Map Options, click here. If node color is disabled, make sure that Performance Color is disabled. These 2 options are not compatible.

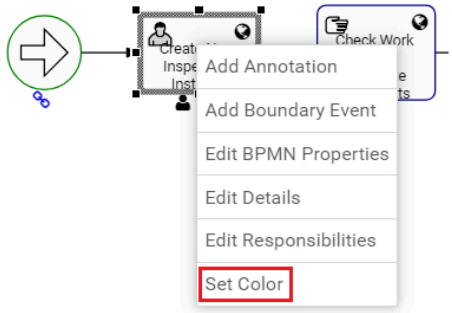


2. Navigate to a process, and go into graph edit mode.



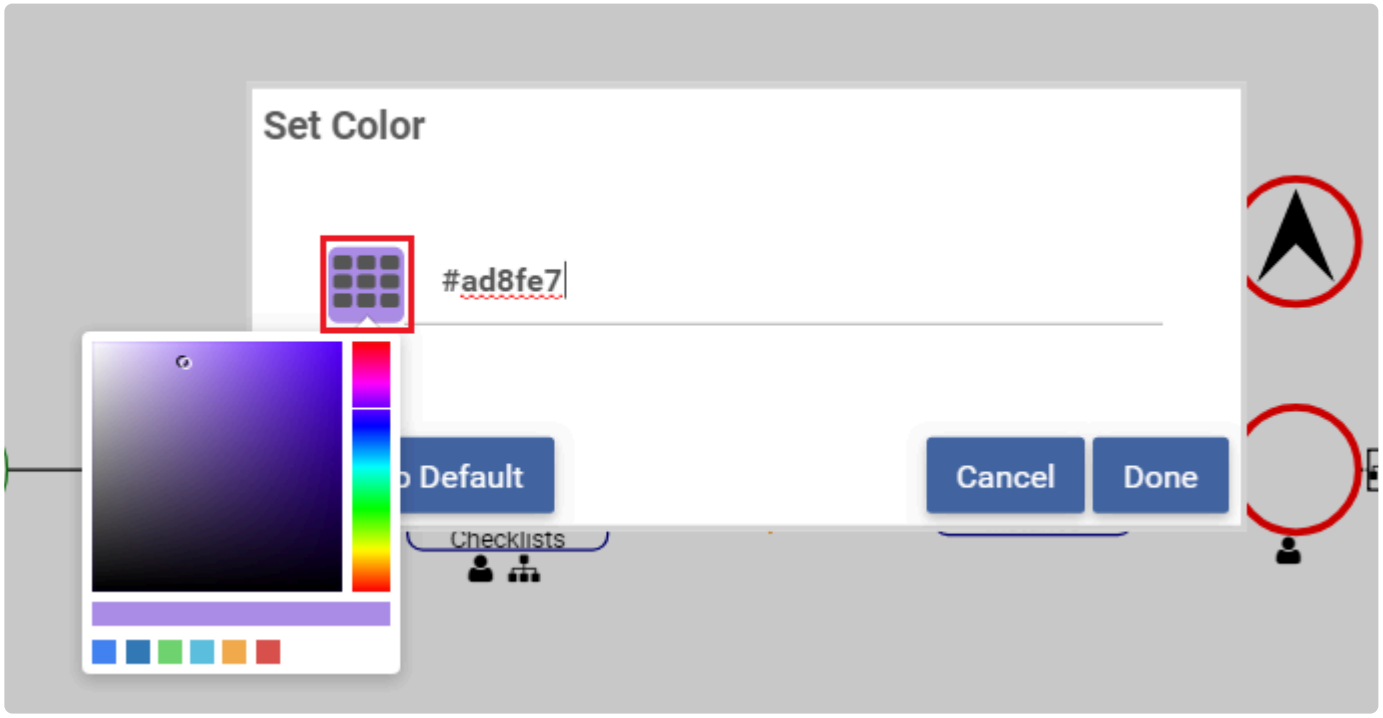
3. Select and right click on a task, event or gateway OR right click on a blank space to select all flow objects. Within the popup menu, click on “Set Color”. Alternatively, you can also click on the palette button on the toolbar to access the color menu.

> To select multiple shapes, hold down the ctrl key on your keyboard and select the shapes.



OR

4. Enter a color code (hex format), or click on the color picker to open it and select a color



5. When done, click on “Done” to apply the color

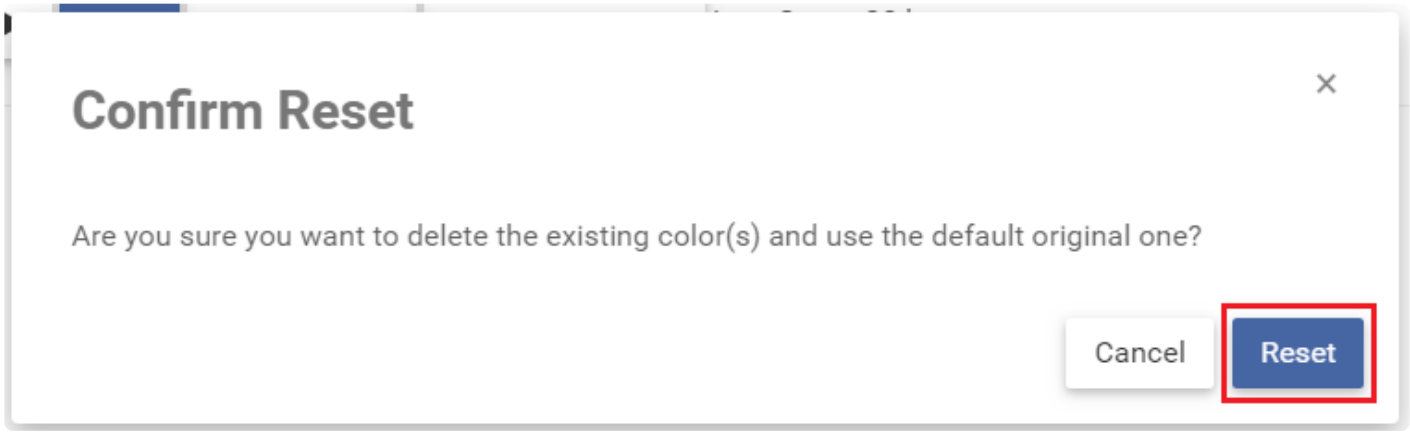
Resetting Colors to Default

To reset a node color:

1. Select and right-click on a flow object OR right click on a blank space to select all flow objects and click “Set Color”

2. Click on “Reset to Default”

3. You will be asked to confirm the reset. Click “Reset”



4. The selected flow objects will now be reset to their default color.

12.2.2.2.12 Mapping with Flowchart Shapes

A flowchart is a type of diagram that represents a workflow, process or algorithm. They are often used in designing and document simple processes or diagrams. They provide a simpler alternative to BPMN 2.0, as flowchart shapes do not have as many notation rules and workflow semantics.

> NOTE: The main notation for process mapping within the EPC is BPMN 2.0. Some features will not work for flowchart maps, such as process books. They will always generate in BPMN 2.0)

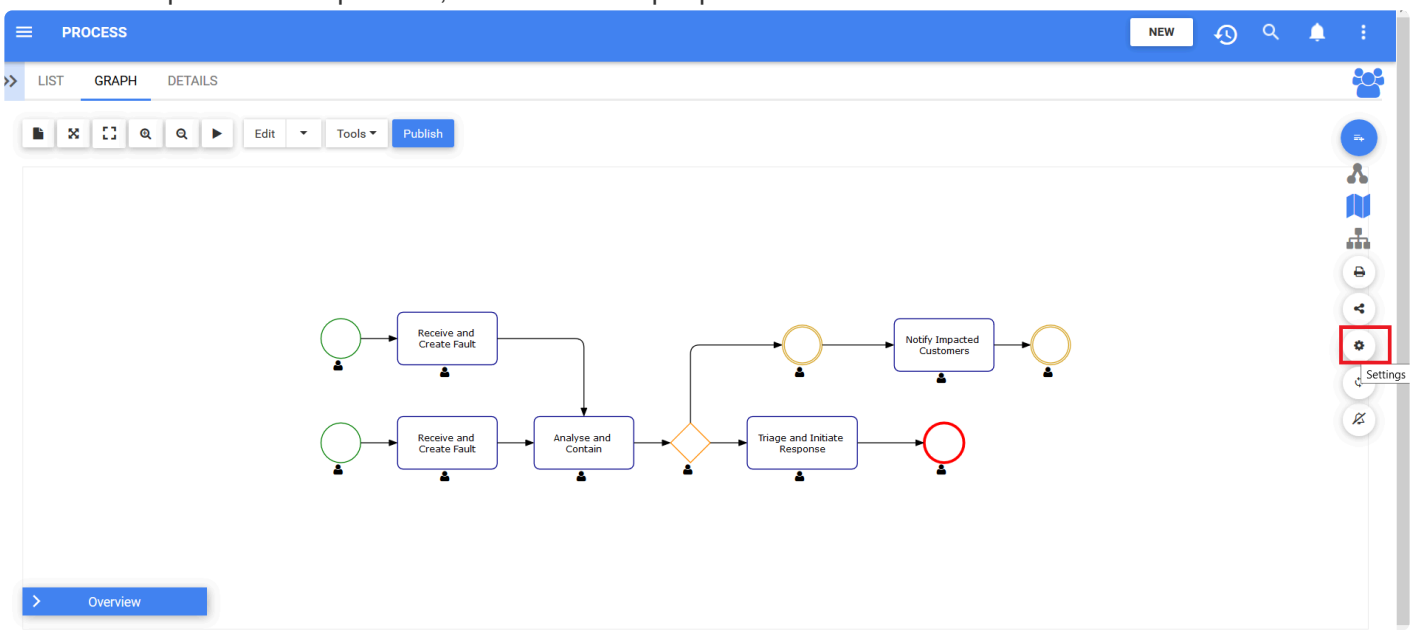
Flowchart Mapping

https://www.youtube.com/embed/OScl-tjwwzk?rel=0

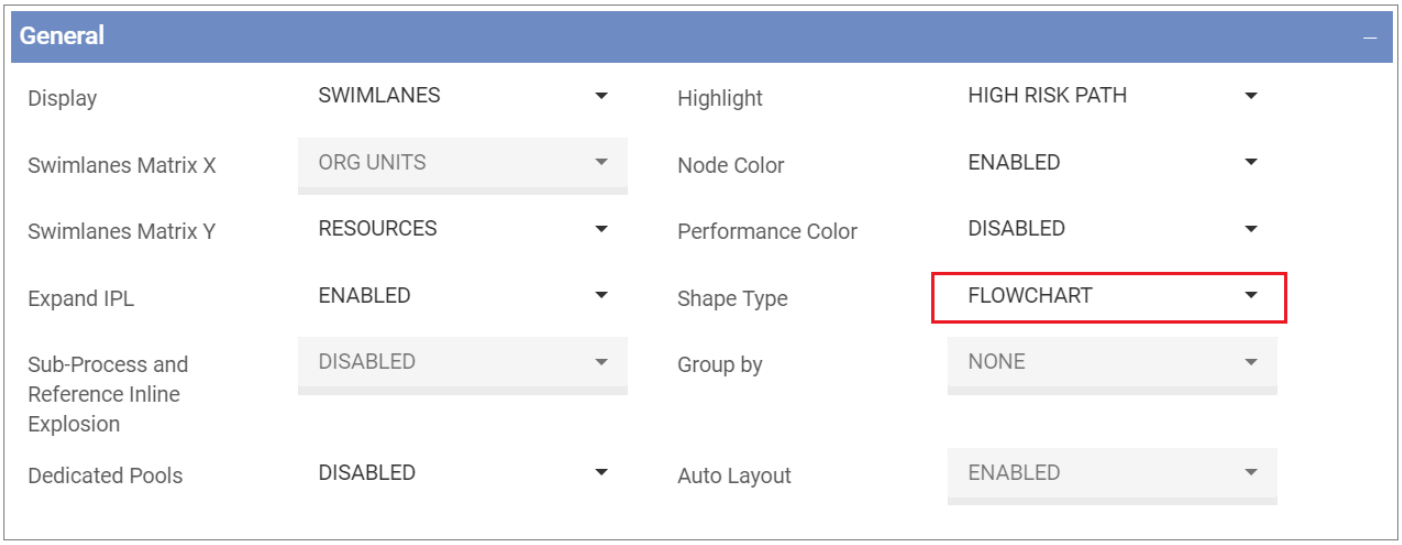
To switch the shapes and the stencil to flowchart:

> The flowchart setting must be enabled in the System Administration settings. If it is disabled, you will not be able to map in flowchart. Contact your System Administrator.

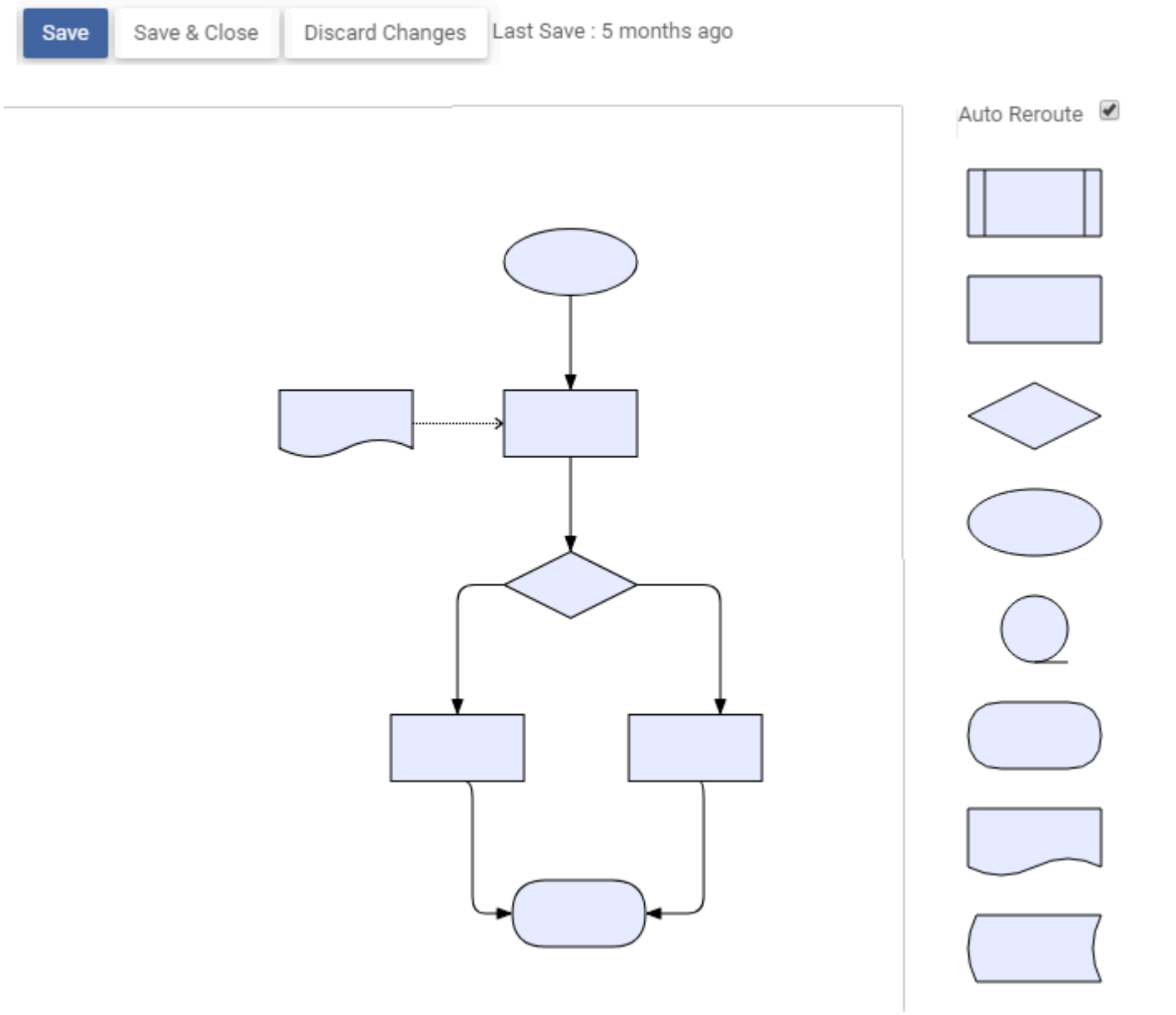
1. In the Graph View of a process, click on the Map Options



2. In the General map options, under **Shape Type**, select **Flowchart**

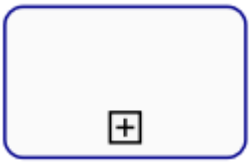


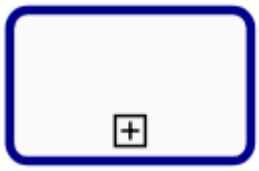
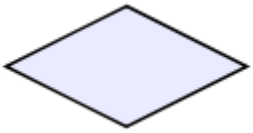
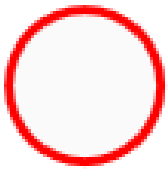
3. The shapes and mapping stencil will be switched to Flowchart



Flowchart Shapes

All flowchart shapes are mapped to their respective BPMN 2.0 shapes. When the map display is switched to flowchart, all BPMN shapes will be converted to flowchart, and vice versa.

Shape	BPMN Icon	Flowchart Icon	Description
Sub Process			A Sub Process is a collection of activities that represent a business process

Shortcut			A Shortcut is used to refer to a sub-process that is repeated in exactly the same way in another process. Shortcuts will be shown as regular sub processes in flowchart
Reference			A Reference is used to refer to a sub-process that is repeated in another process that share similarities but share some differences. References may be edited like a regular sub process. References will be shown as regular sub processes in flowchart.
Task			A Task is a single action that occurs in a business process
Gateway			A Gateway is used to control the divergence and convergence of multiple sequence flows
Start Event			A Start Event is the event that starts a business process
Intermediate Event			An intermediate event that supports the progress of a business process
End Event			An End Event is the event that ends a business process
Artifact			Artifacts are data objects that represent data placed into the process, data resulting from the process, data that needs to be collected, or data that must be stored

Data Store			A data store is a place where the process can read or write data

Note that some BPMN 2.0 elements will not be carried over to flowchart, such as:

- Boundary Events
- BPMN Properties on transitions, BPMN shapes

The mapping functionality is the same whether you are mapping in BPMN or Flowchart. See this section for more information on mapping.

12.2.2.2.13 Assign Existing Object (Shortcut)

Once a task or a shortcut has been created in EPC, modelers can choose to assign an existing object to create a shortcut. The result is a shortcut object that has all the associations and content of the original object. There are 2 types of shortcuts:

- Process Shortcut
- Task Shortcut

Shortcuts allow you to re-use existing content across your application, while centrally managing the object in 1 location. Shortcuts allow you to re-use exact content on multiple instances. If further customization is needed when you re-use content, check out our reference feature here, which will allow you to re-use, and customize existing content.

In addition, both task shortcut and process shortcut can be either created in graph view or in swimlane view.

Shortcuts & References Video

https://www.youtube.com/embed/lLqjEX73GzI?rel=0

https://www.youtube.com/embed/lLqjEX73GzI?rel=0

Rules of Shorcuts in Swimlane Mapping

Because in swimlane, the layout and the lanes created are dependent on the responsibility of their flow object, there are rules to follow when assigning a task shortcut or a process shorcut.

When I create a shortcut that its source has a RASCi set to Responsible and there is a lane with a similar RASCI of Responsible, then it will move that shortcut to that lane.

When the shortcut is dropped outside a none lane, in our map, then it will go back to the NONE lane without an auto layout

When the shortcut is dropped outside of its designated lane, then it will return back to its lane without an auto layout

When a shortcut is already set to a lane , but then the rasci in the definition has changed from Responsible to any of the other: Accountable, Supportive, Consulted, Informed, then it will move to none lane

When a shortcut is already set to a lane with role A, then a second role B was added to the same lane, then it will create a new lane with the same rasci with only role A and move the shortcut there

Assume there are 2 lanes with role A and role B respectively. and each lane has multiple objects. Assume role A has a shorcut but then we decide to change the rasci of the definition(shortcut) from role A to role B, then it will move the shortcut to the lane with role B and take the best route

When you move, shortcut & general flow objects out of lanes then they should go back to their previous lane

When you move shortcut & general flow objects between lanes, then shortcuts should go back to its previous lane and the other object will be in the new lane

When you assign a new RASCI to a lane that already has shorcuts and flow objects, then it will create a new lane for all the flow objects, but the shortcut will remain on its first rasci lane

When you assign a new RASCI to a lane that only has shortcuts, then it will create a new empty lane with the new rasci, but all the shortcuts will remain on its first rasci lane

When you remove all rasci from a lane that has shortcut and flow object, then the shortcut keeps the rasci and the lane, but all the rest of the flow objects go to none lane

When you remove part of the rasci from a lane that has shortcut and flow object, then the shortcuts keeps the rasci and the lane, but all the rest of the flow objects go to the new lane with all new rasci

When try to remove RASCI from lane which contains shortcut ONLY, by clicking on the “x”, then you won’t be able to remove the racis, the “Edit Responsibility” window will close and you will receive a message stating: “You cannot remove a rasci from a lane that only has shortcut(s)”

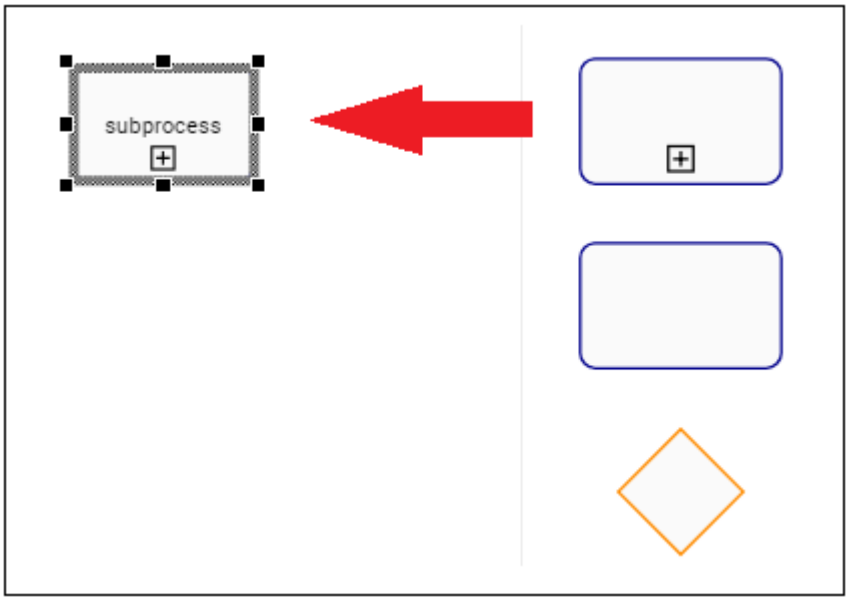
12.2.2.2.13.1 Assign Existing Process (Process Shortcut)

If a process has been defined in an environment, modelers have the option to re-use the process by creating a shortcut. Process shortcuts are useful if a process is repeated multiple times in other processes; the modeler does not have create the same process for each time it is repeated.

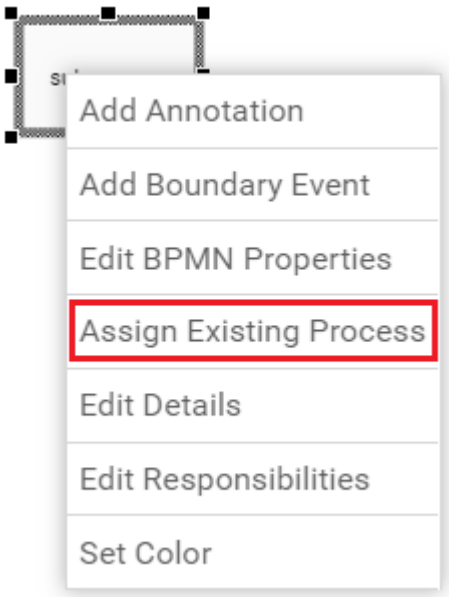
> The shortcut is not a copy of the process. It is an EPC Object that is linked to the assigned process. You cannot edit the details of the shortcut itself.

To create a process shortcut:

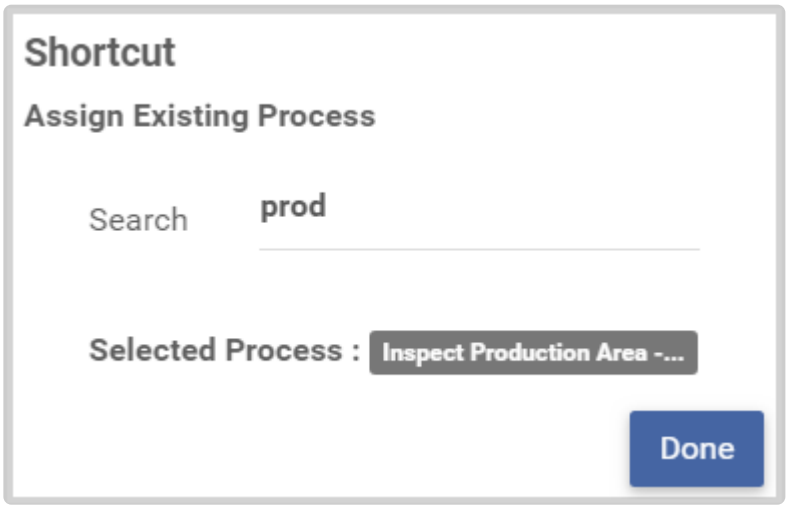
1. Drag a process shape onto the map



2. Right-click on the process shape
3. Select “Assign Existing Process”



4. Type search for the process. To select a process, simply click on it.



4. Click on “Done” once an existing process has been selected
5. The shortcut will be created (the shape is outlined by a blue bolded border)

Editing a Process Shortcut

You cannot edit the details of a process shortcut. You can however assign a sequence

number and a color to the process shortcut.

12.2.2.2.13.2 Assign Existing Task (Task Shortcut)

If a task has been defined in an environment, modelers have the option to re-use the task by creating a shortcut. Task shortcuts are useful if a task is repeated multiple times in other processes; the modeler does not have create the same task for each time it is repeated.

> The shortcut is not a copy of the task. It is an EPC Object that is linked to the assigned task. You cannot edit the details of the shortcut itself.

Shortcuts & References Video

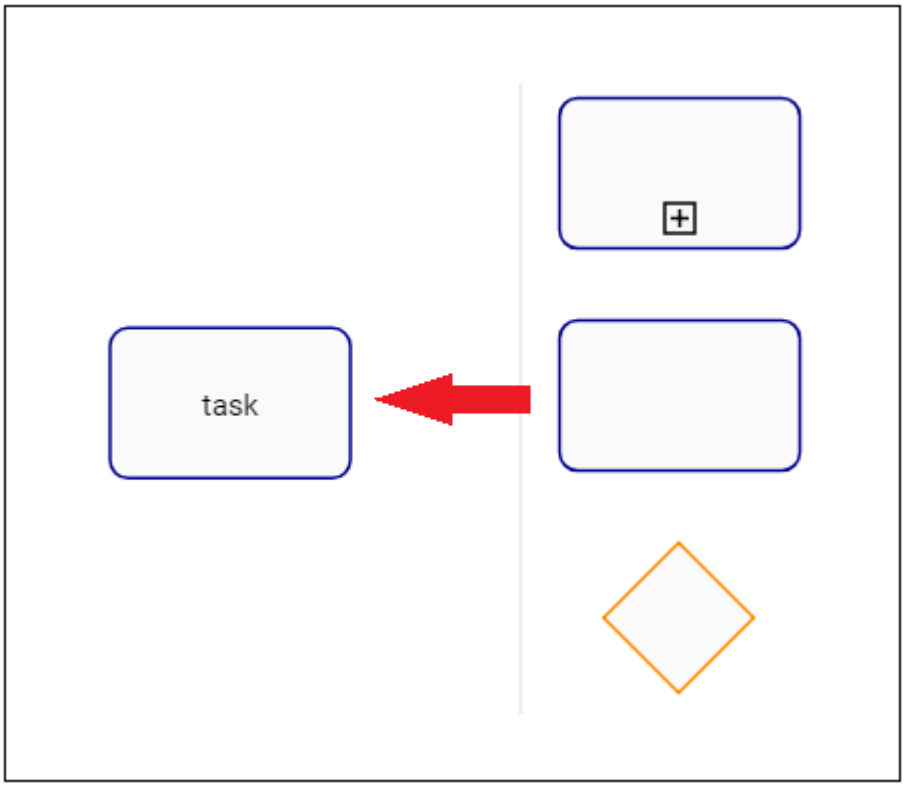
https://www.youtube.com/embed/lLqjEX73GzI?rel=0

https://www.youtube.com/embed/lLqjEX73GzI?rel=0

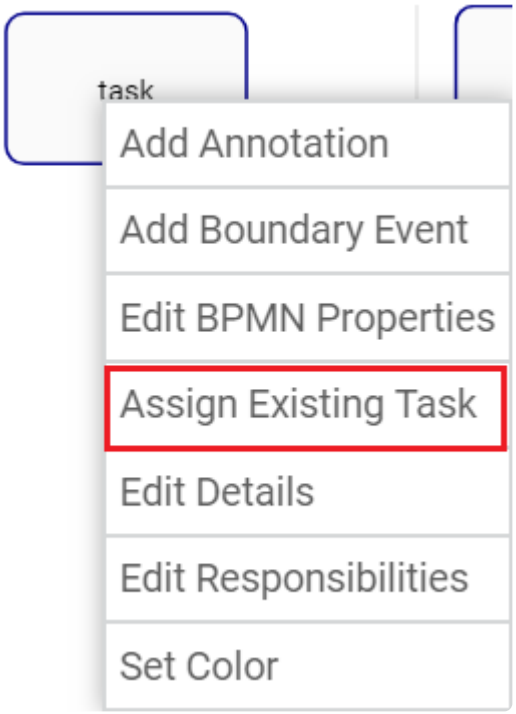
https://www.youtube.com/embed/lLqjEX73GzI?rel=0

To create a task shortcut:

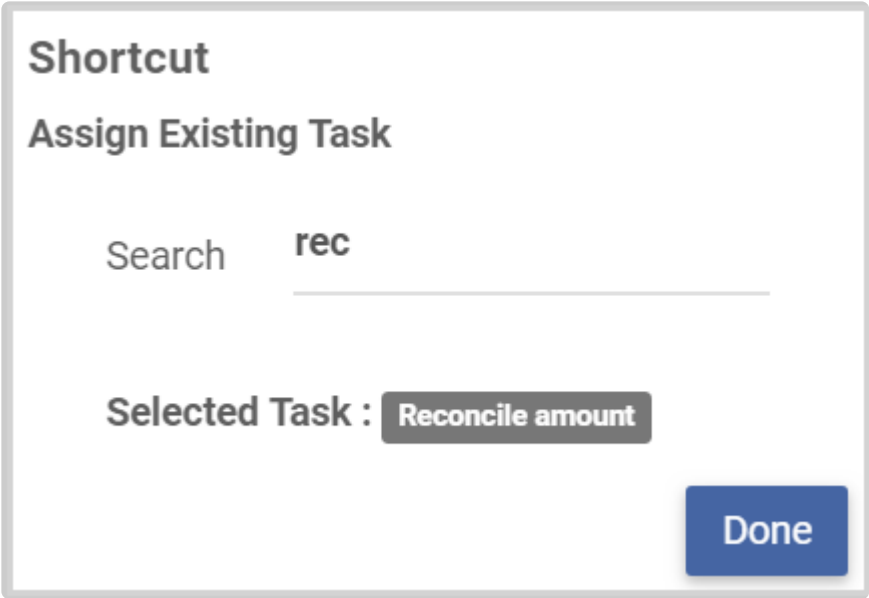
1. Drag a task onto the map



2. Right-click on the task
3. Select “Assign Existing Task”



4. Type search for the task. To select a task, simply click on it.



4. Click on “Done” once an existing task has been selected
5. The shortcut will be created (the shape is outlined by a blue bolded border)

Editing a Task Shortcut

You cannot edit the details of a task shortcut. You can however assign a sequence number and a color to the task shortcut.

12.2.2.2.14 Saving Annotation Locations

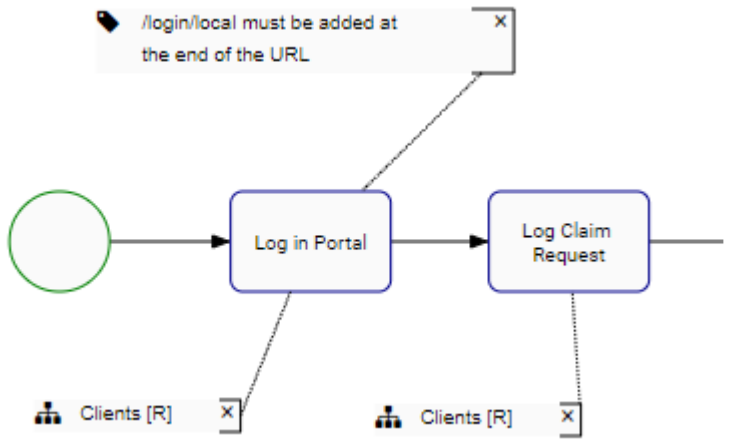
Users can save annotation position by dragging them on the canvas.

Annotations can be moved and saved for all of the following:

- All EPC object associations
- Boundary Events
- Event & Gateway Name
- Inputs/Outputs
- Annotation
- Categories
- Description
- IPLs

In Graph Edit

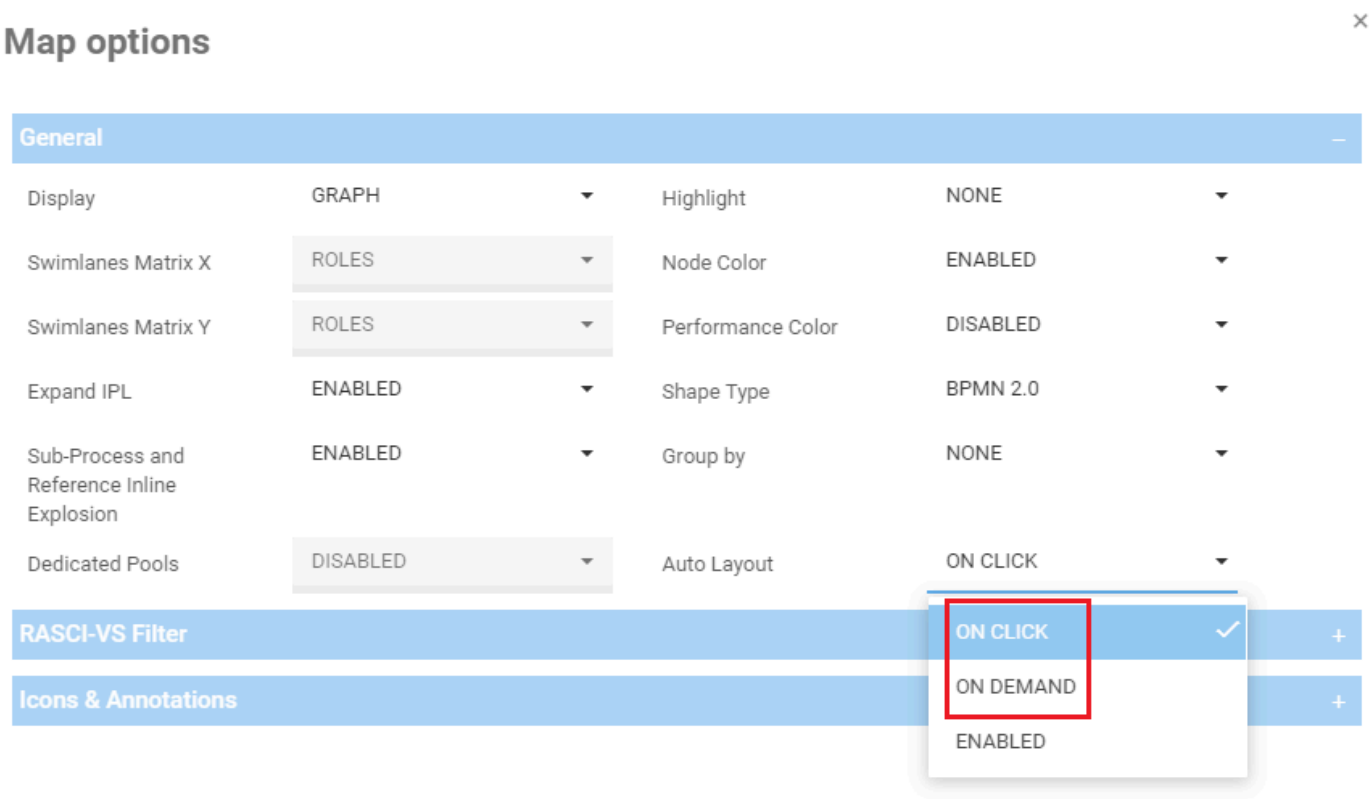
To save an annotation's position, drag the annotation label to the desired position and save the graph



> ! If auto-layout is run when editing the process graph, all annotations will go back to their original position.

In Graph View

Users will see the map as it was saved while the auto-layout options is set to "On Click" or "On Demand".



! If the user's map options is set to "Enabled", auto-layout will automatically be run and the annotations will go back to their default position. To view annotations in their saved location, change the auto-layout option to "On Click" or "On Demand" and refresh the page.

12.2.2.3 Annotations

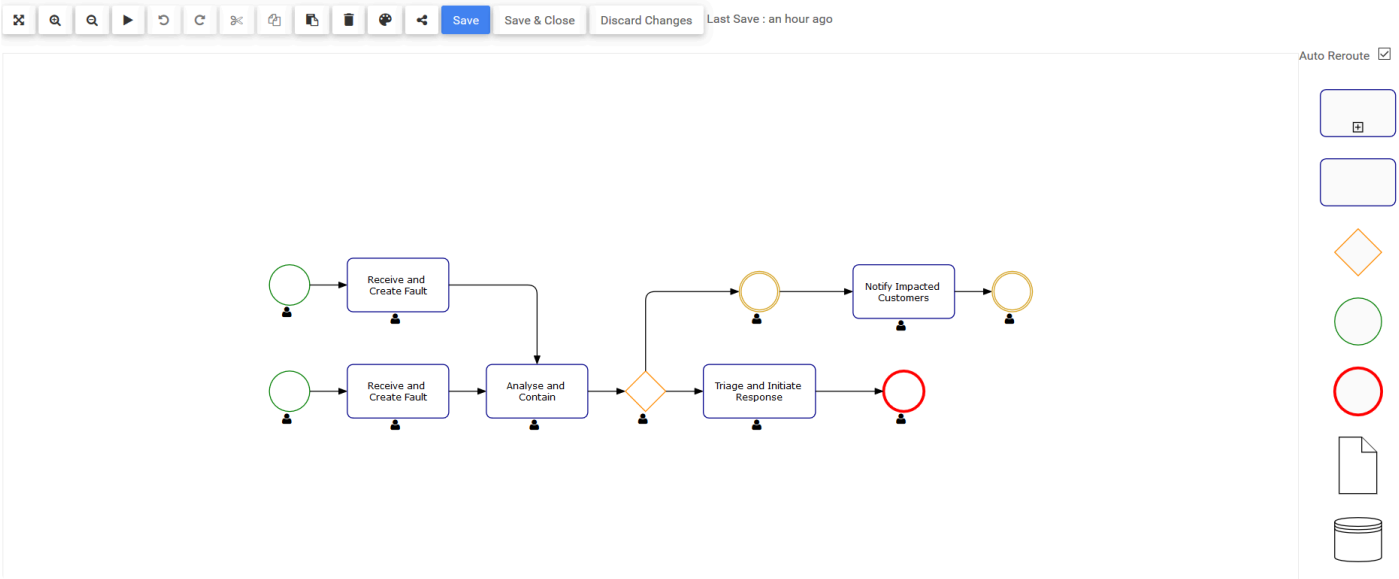
Annotations allow the Web Modeler to describe additional flow parts of the shape.

Annotations are available for:

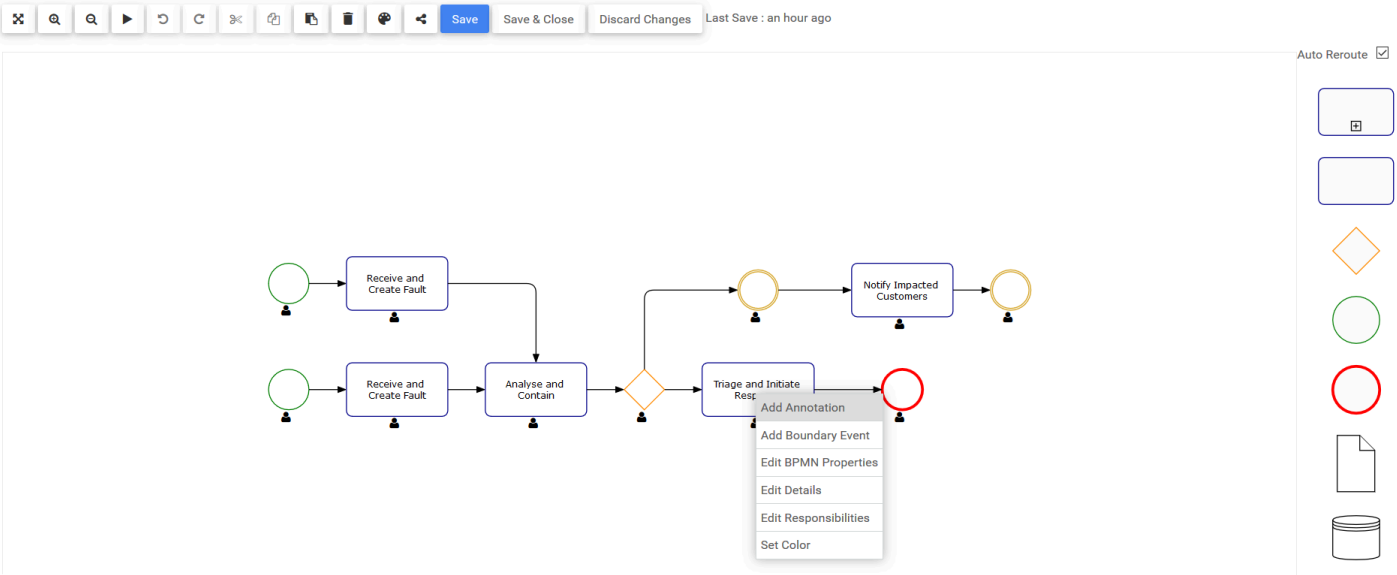
- Task
- Sub-process
- Gateway
- Start event
- End Event

Add an Annotation

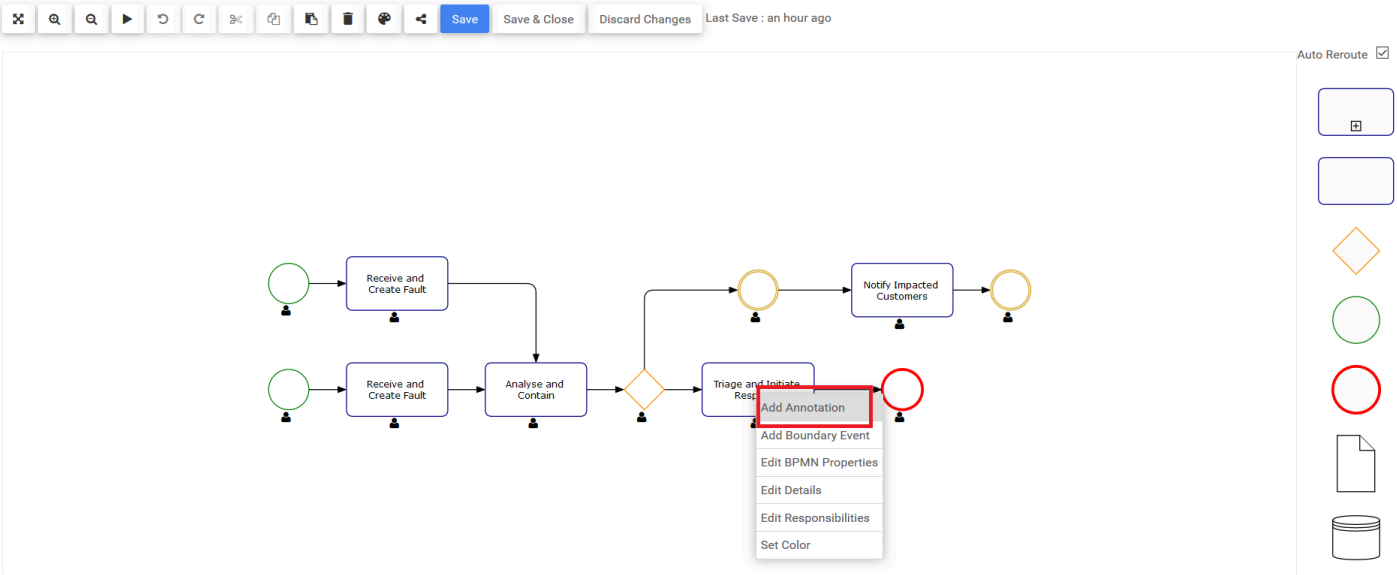
1. Navigate to the shape you would like to add an Annotation to. In this example, a task



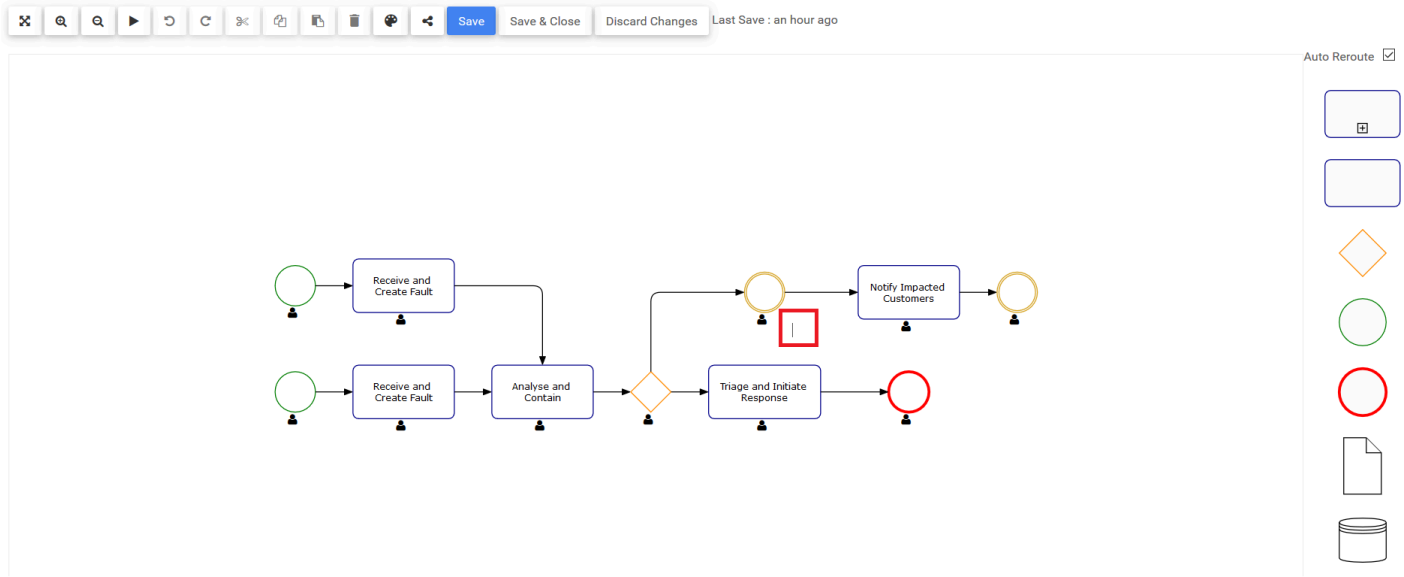
2. Right-click on the shape. A drop-down menu will be generated



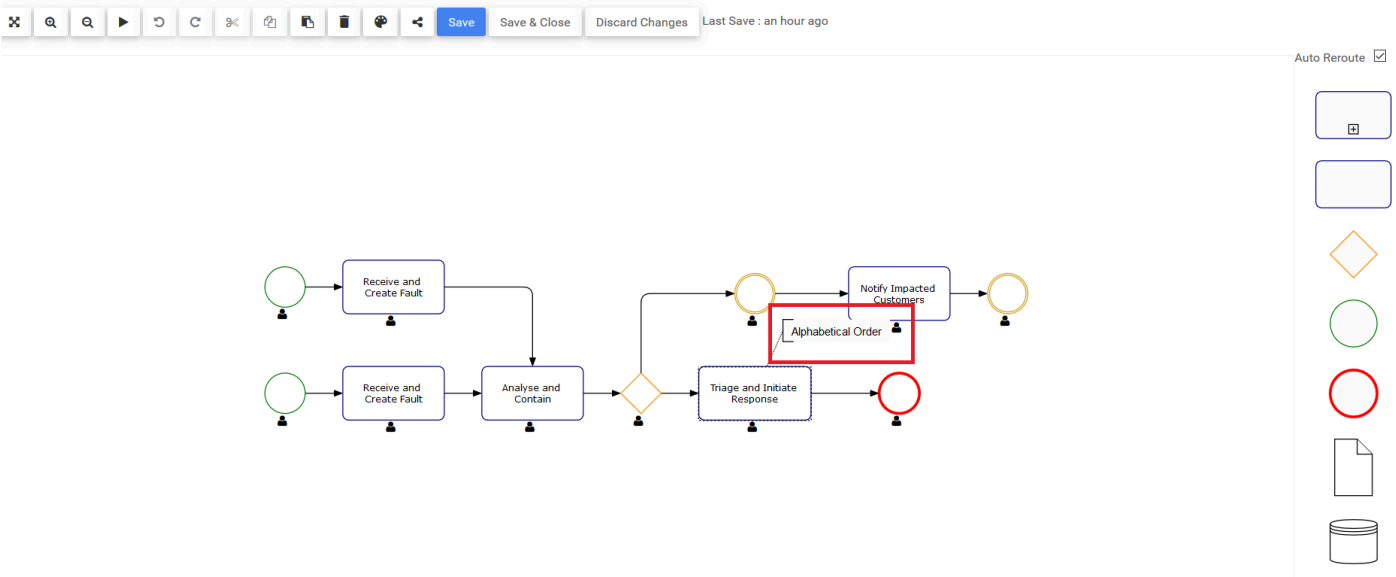
3. Choose the “Add Annotation” box



4. The Annotation box will appear on top of the shape

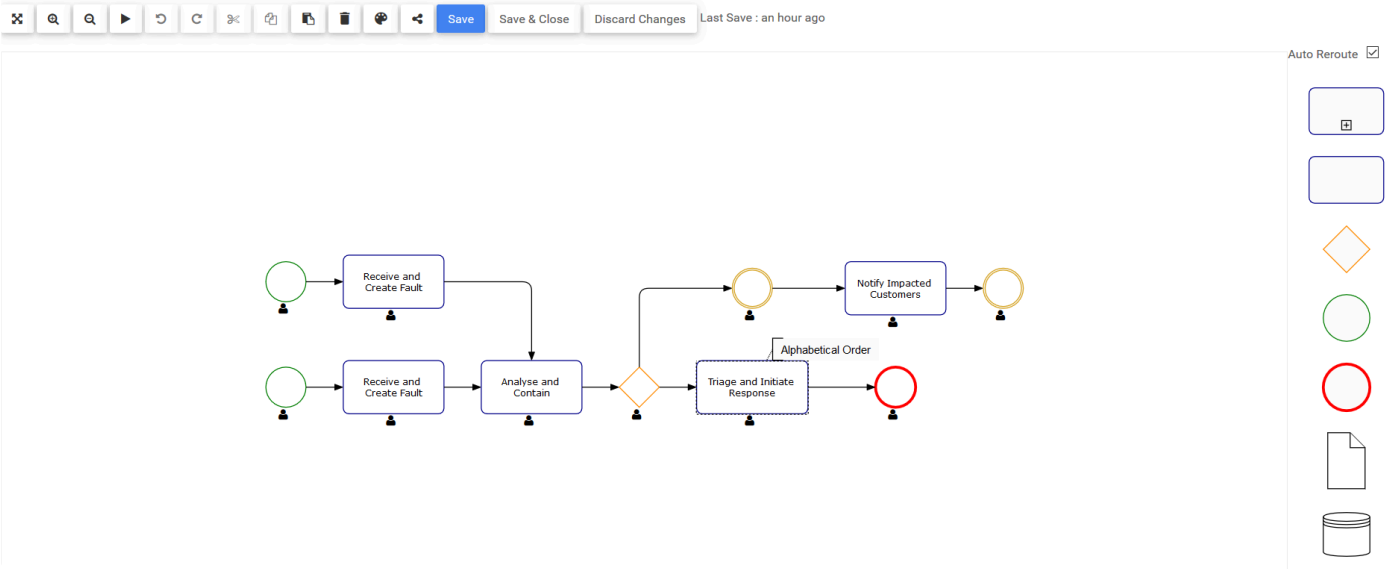


5. Type the Annotation inside the input field. Click enter on your keyboard when finished

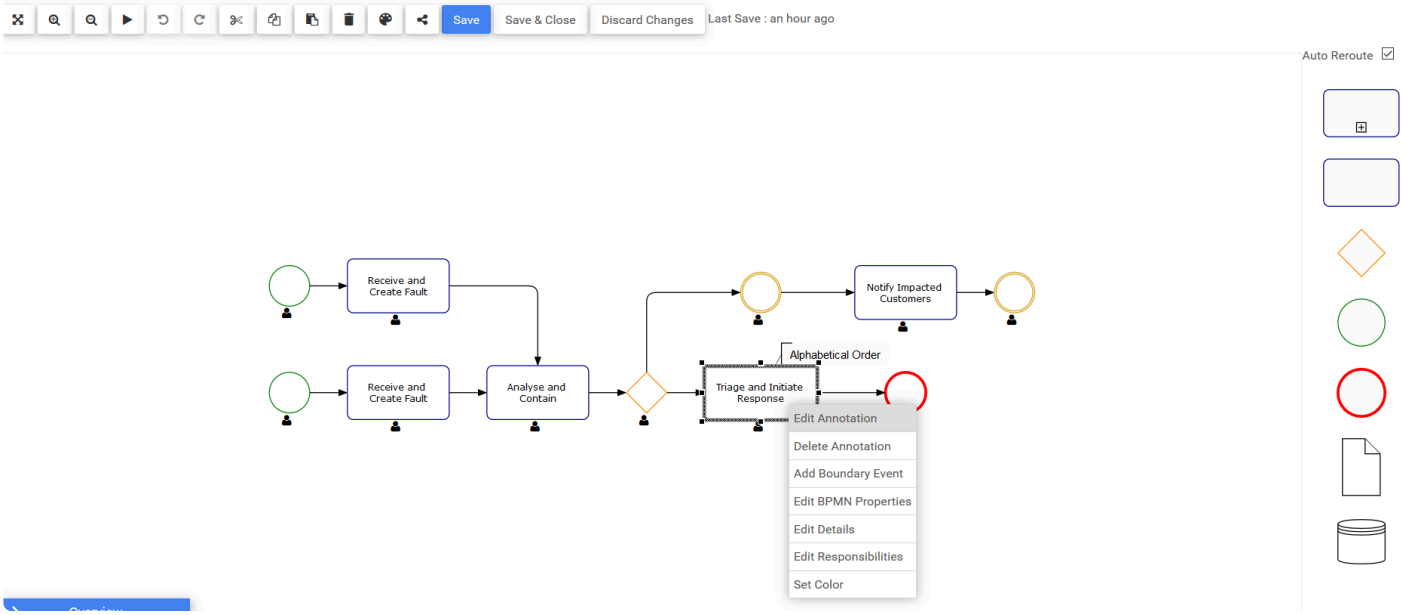


Edit an Annotation

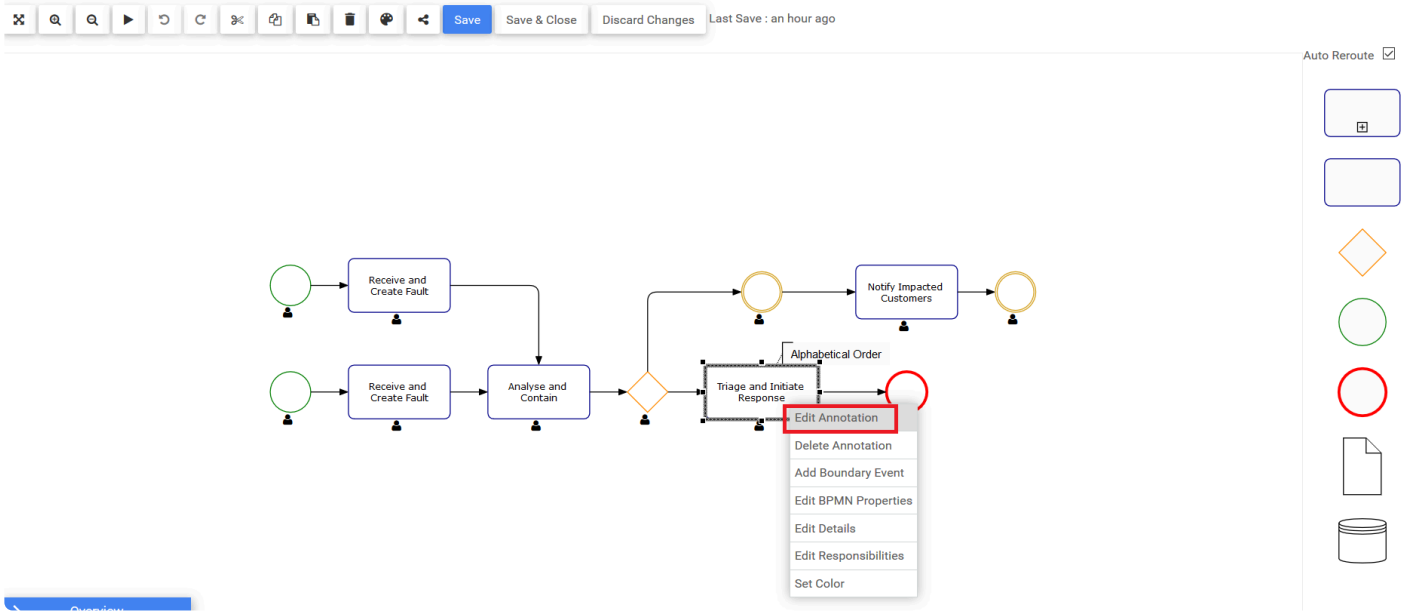
1. Navigate to a shape with an Annotation



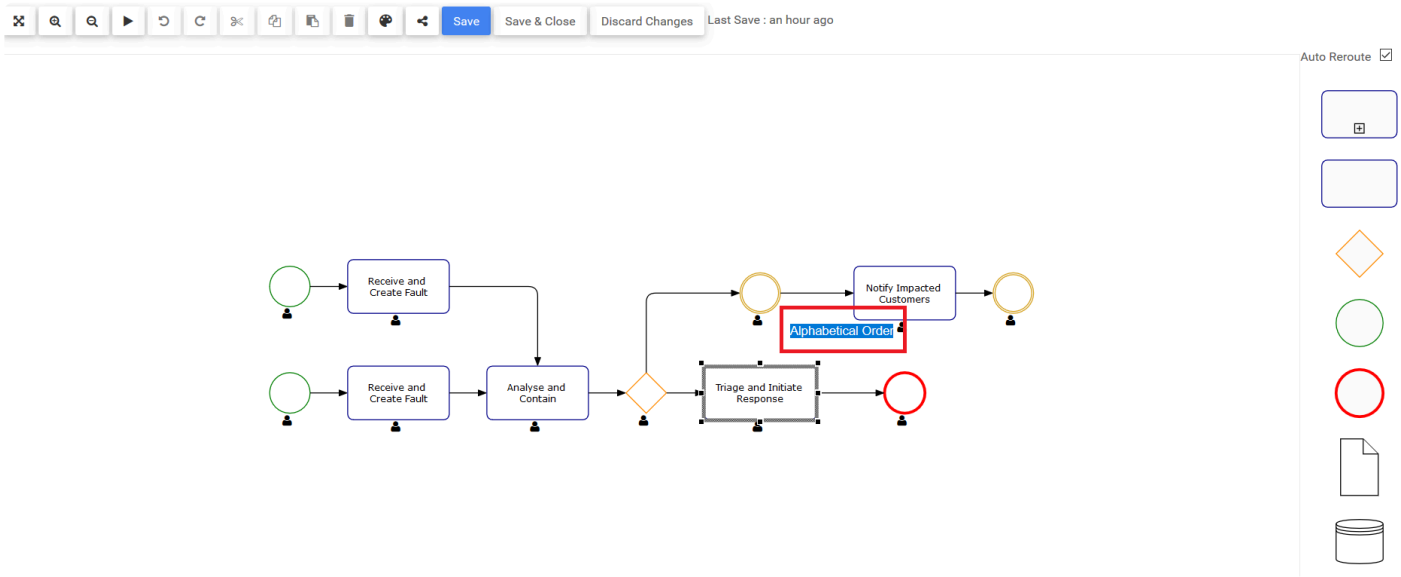
2. Right-click on the shape. A drop-down menu will be generated



3. Choose the “Edit Annotation” box

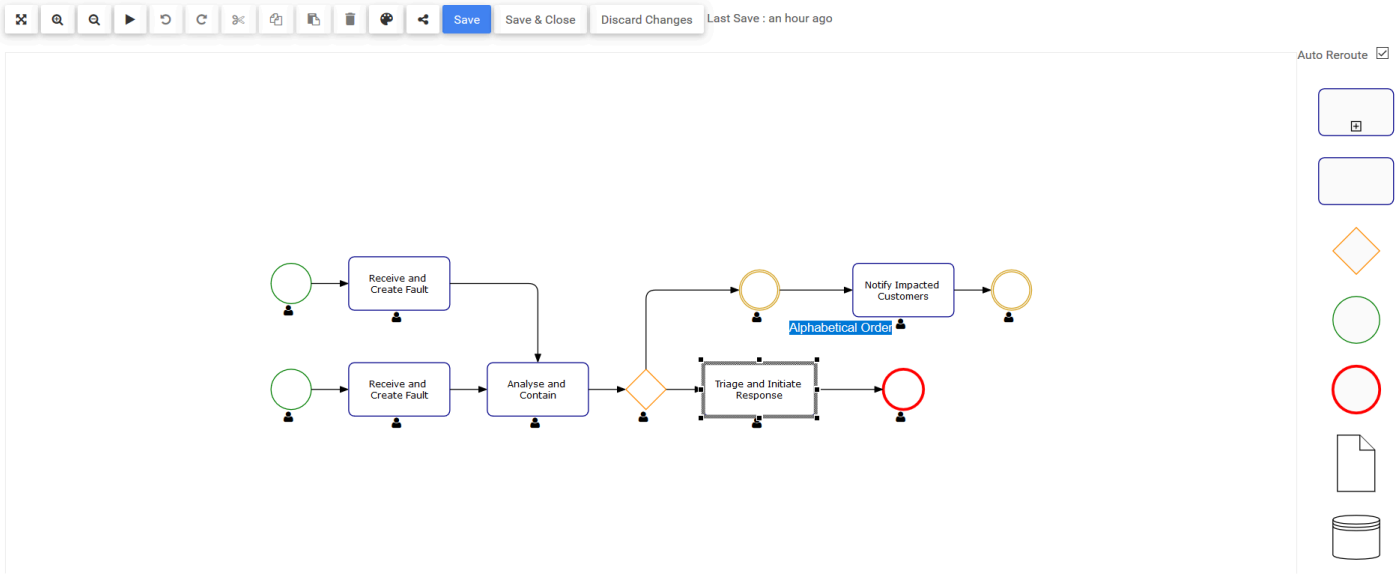


4. Edit the Annotation inside the input field. Click enter on your keyboard when finished

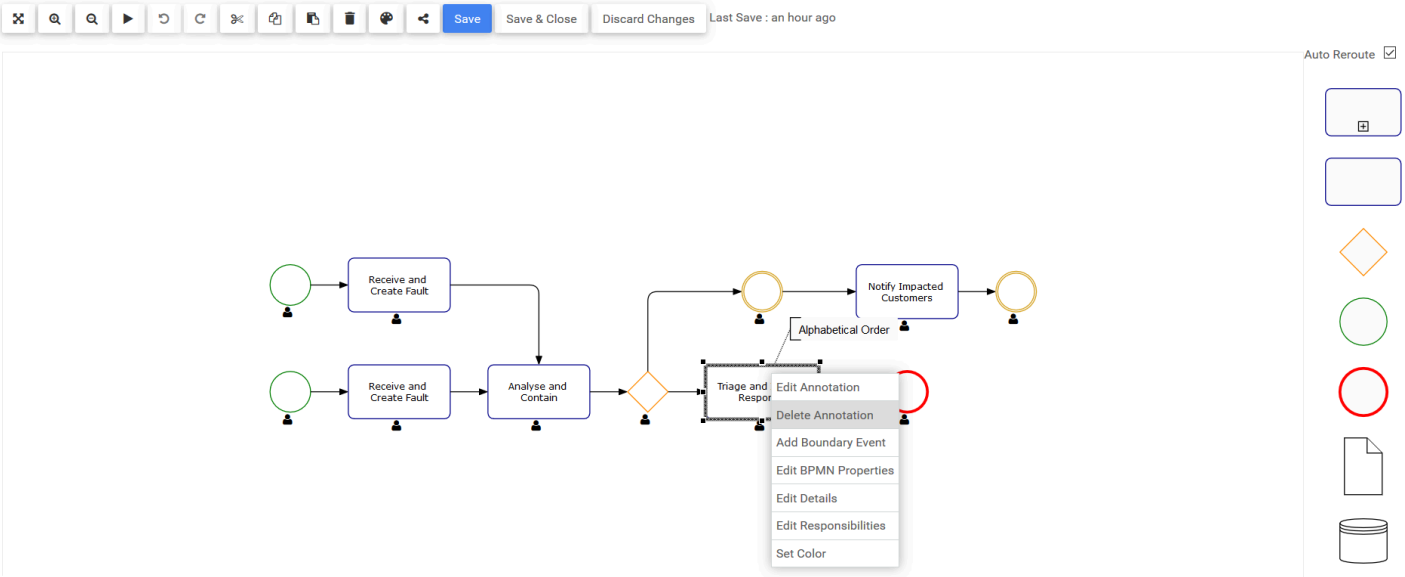


Delete an Annotation

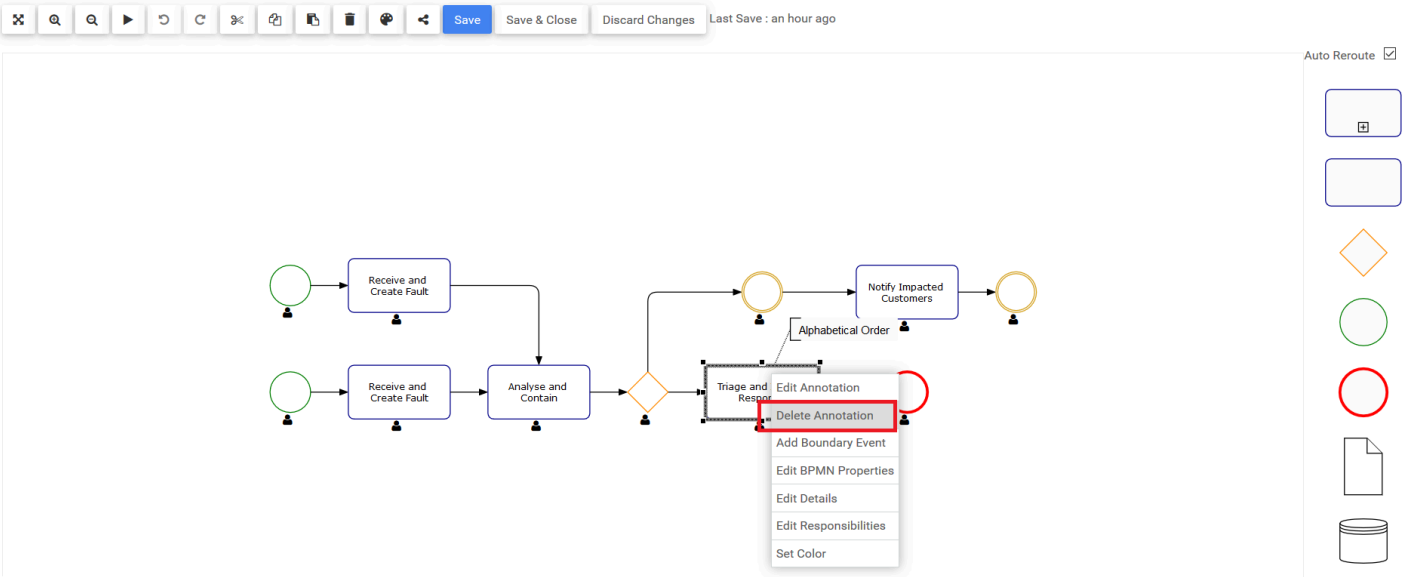
1. Navigate to a shape with an Annotation



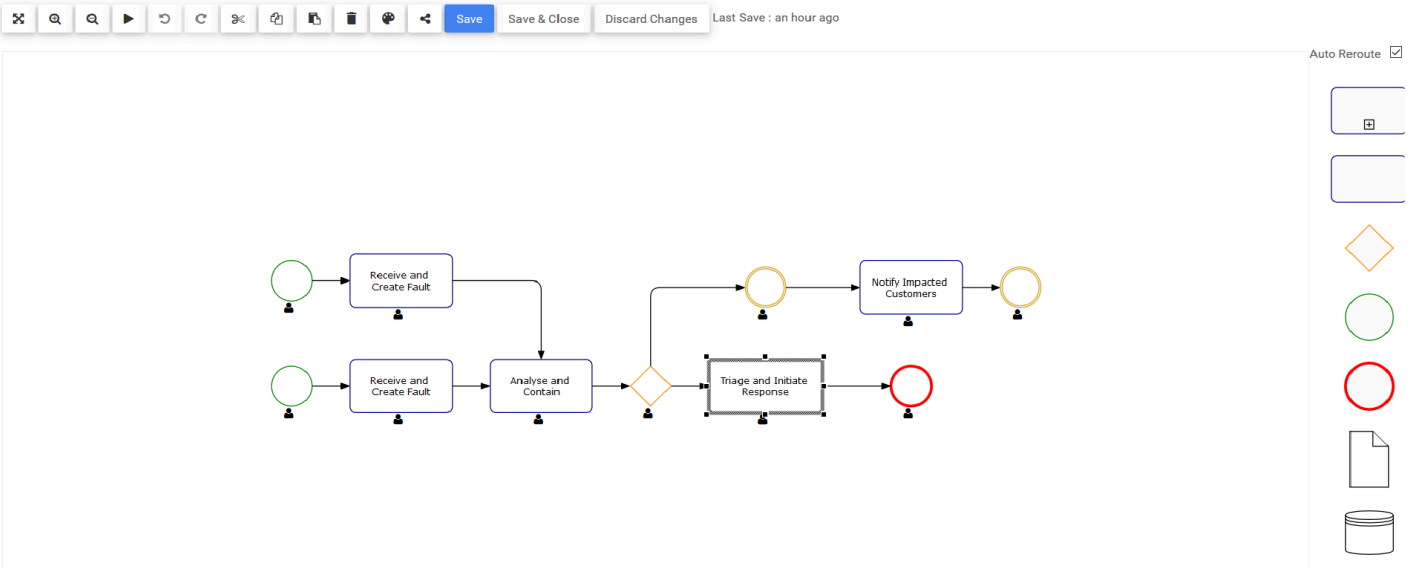
2. Right-click on the shape. A drop-down menu will be generated



3. Choose the “Delete Annotation” box



4. The Annotation is deleted



12.2.2.4 Boundary Events

Boundary events are used to handle exception events that occur throughout a process on a specific activity. When an interrupting boundary event is triggered, the activity is stopped and the flow of the boundary event is taken. When a non-interrupting boundary event is triggered, the flow of the boundary event runs in parallel with the normal process flow.

Web Modelers can assign the Boundary Events to Sub-Processes and Tasks when mapping processes on Graph Edit Mode.

This table explains the different characteristics and types of the Boundary Events:

Boundary Events	Symbol
Event Characteristic	Interrupting: Non-Interrupting:
Event Type	None Message: Timer: Escalation: Conditional: Link: Error: Cancel: Compensation: Signal: Multiple: Parallel Multiple:

The Boundary Events section will cover:

1. Add Boundary Events
2. Edit Boundary Events
3. Remove Boundary Events

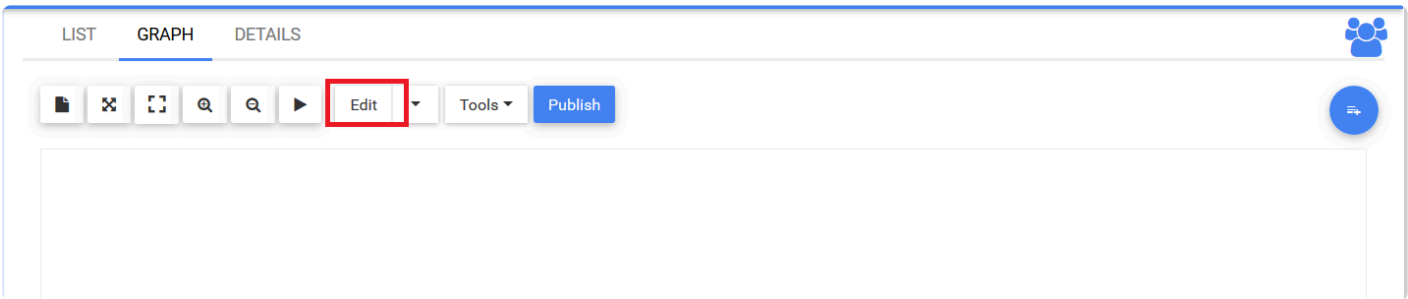
12.2.2.4.1 Add Boundary Events

Web Modelers can assign Boundary Events to Sub-Process and Task shapes while working on Graph Edit Mode.

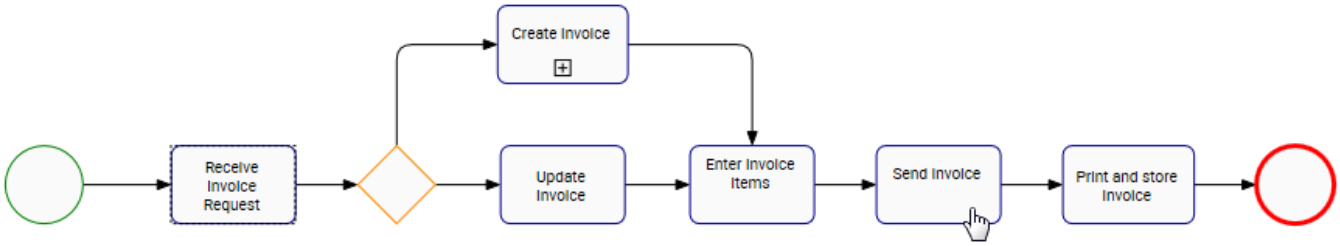
To Add a Boundary Event, please follow the instructions.

> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

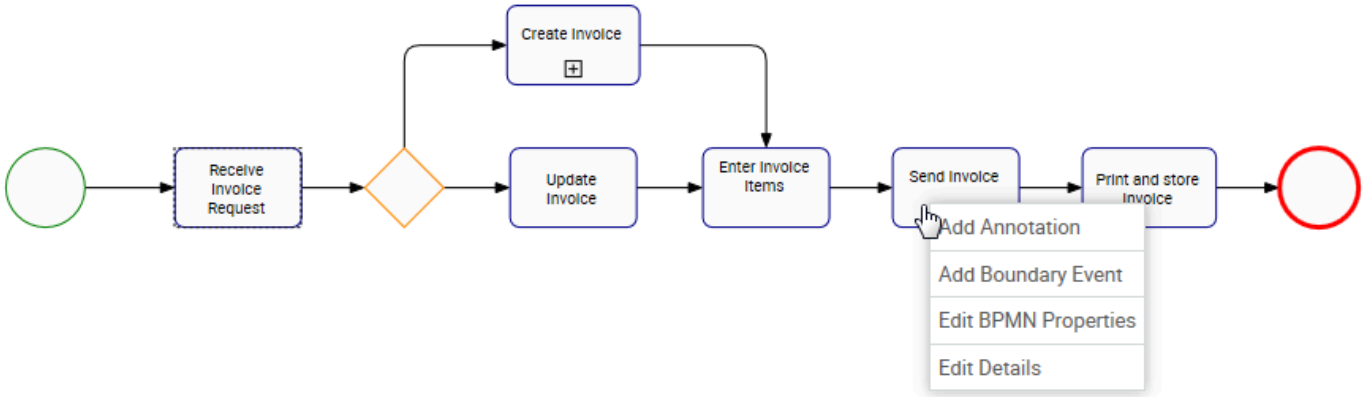
1. Navigate to Full Screen Edit Mode, after clicking on Edit Button



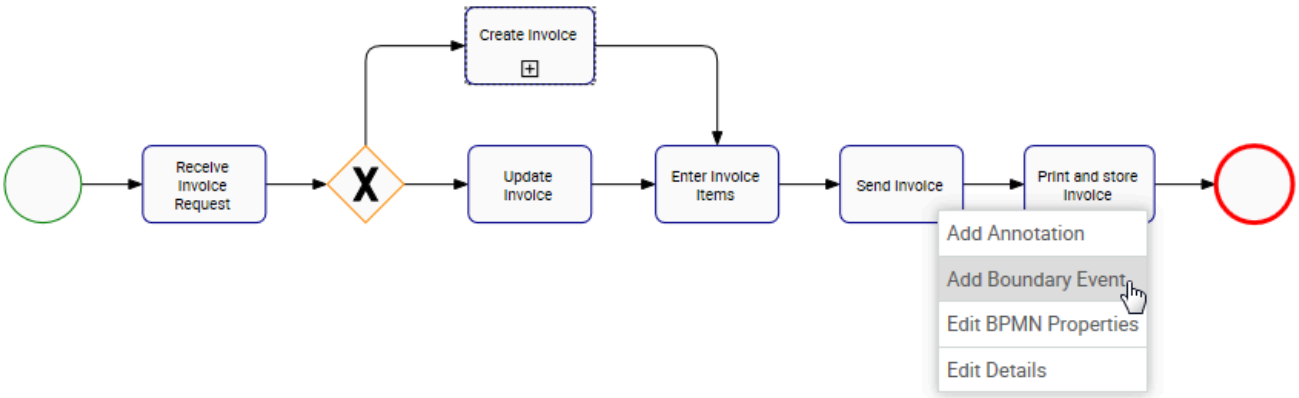
2. Navigate to a Sub-Process or Task shape. In this example, navigate to a task



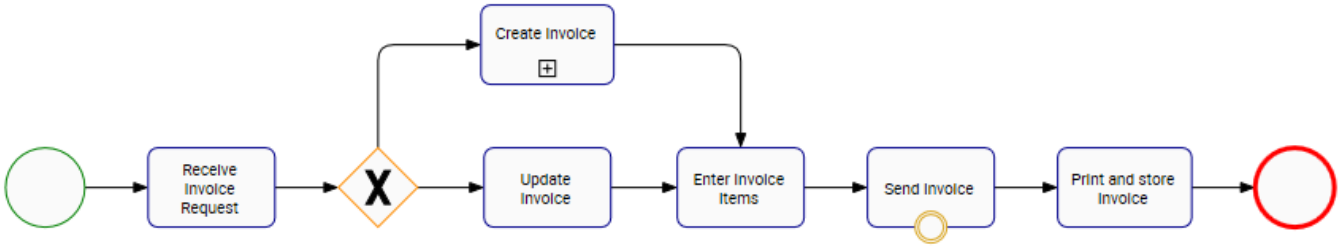
3. Right-click on the Task shape. A drop-down menu will be generate



4. Choose the “Add Boundary Event” box



5. The Boundary Event icon will appear on the task shape



To edit boundary events, click here

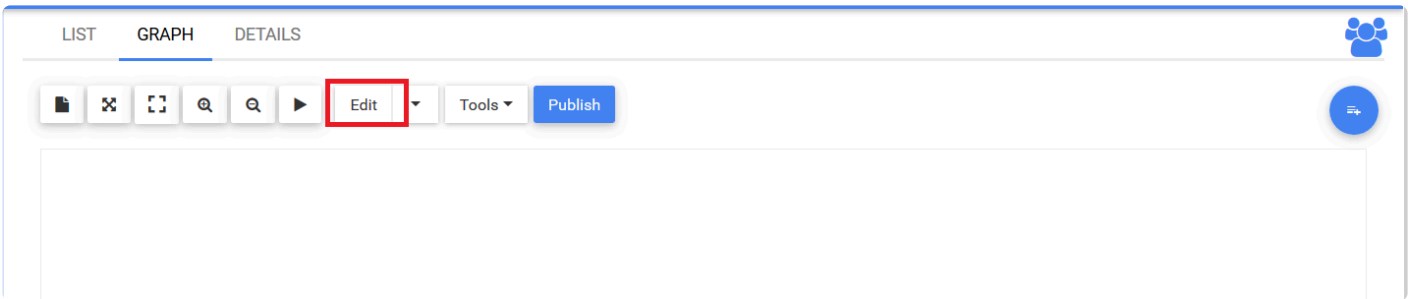
12.2.2.4.2 Edit boundary events

Web Modelers can edit the characteristic and type of the Boundary Events assigned to Sub-Processes and Tasks.

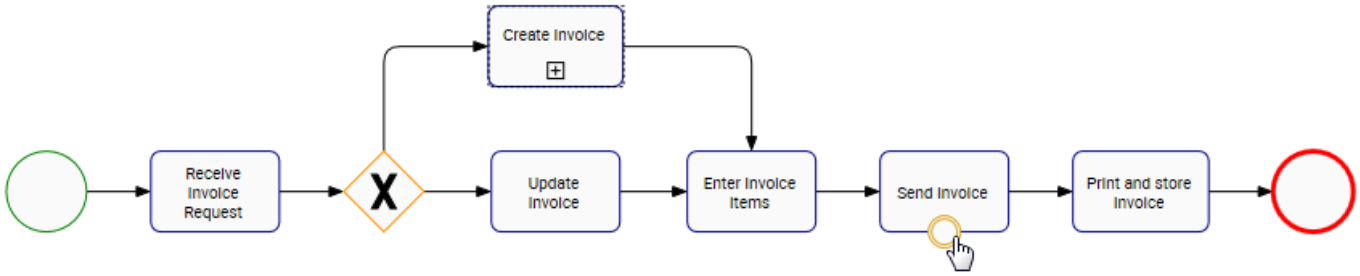
To Edit a Boundary Event, please follow the instructions.

> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

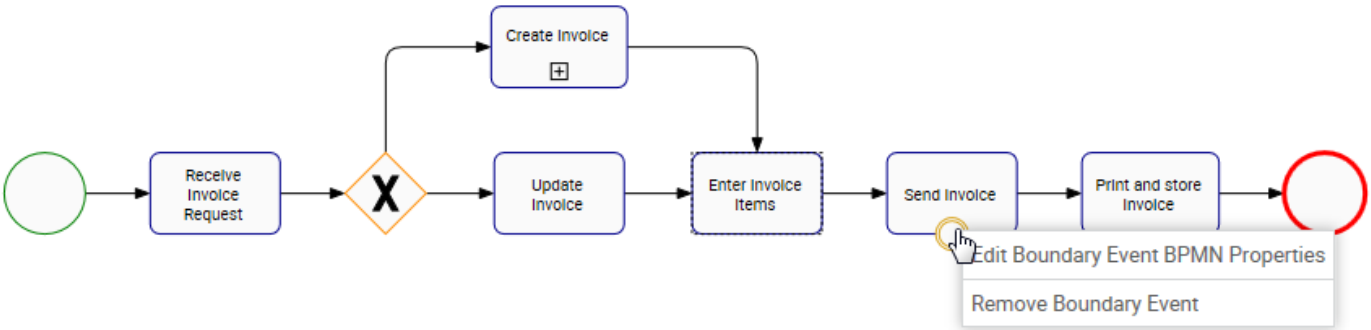
1. Navigate to Full Screen Edit Mode, after clicking on Edit Button



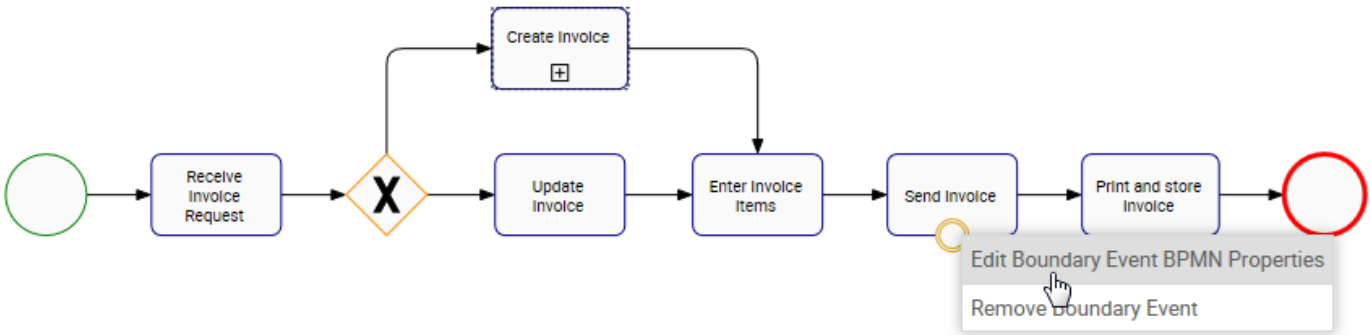
2. Navigate to the icon of the Boundary Event



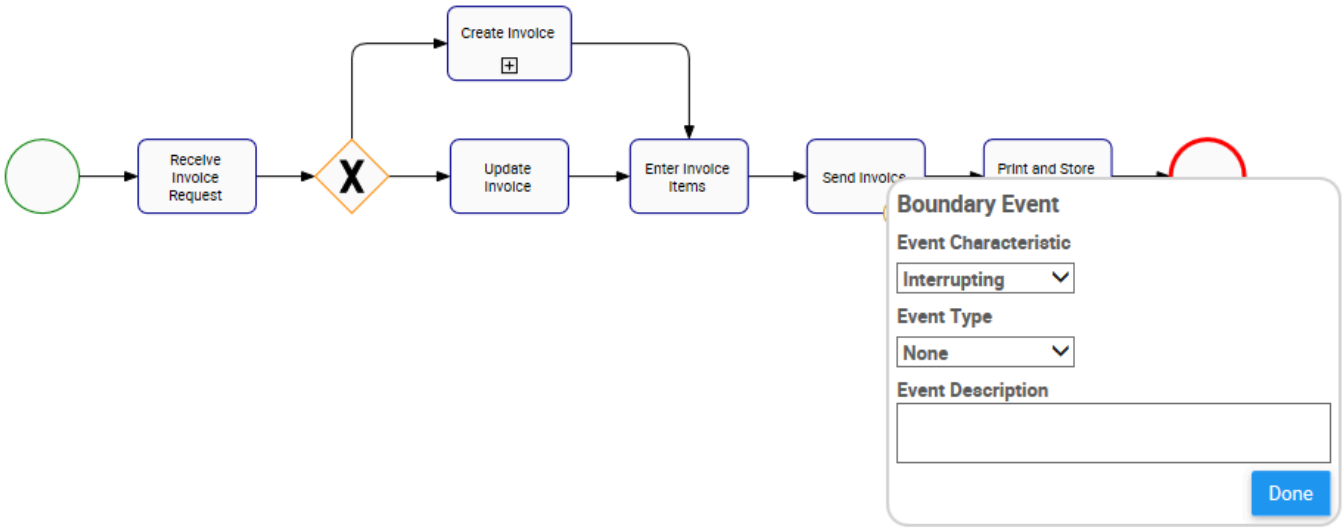
3. Right-click on the Boundary Event. A drop-down menu will be generated



4. Choose the “Edit Boundary Event BPMN Properties” box

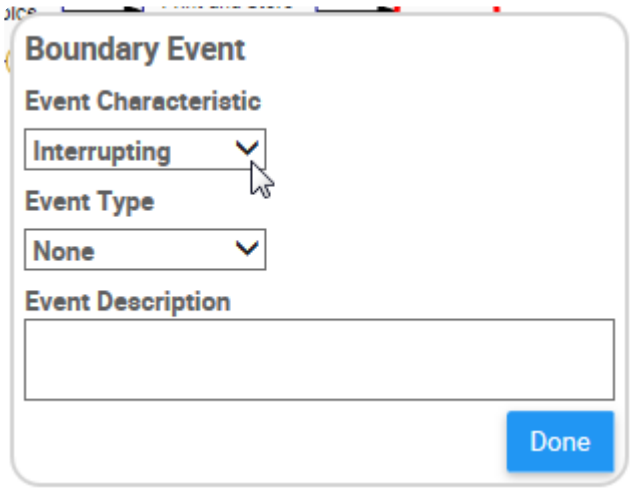


5. A pop-up will be generated allowing you to choose the Boundary Event BPMN Properties for the task

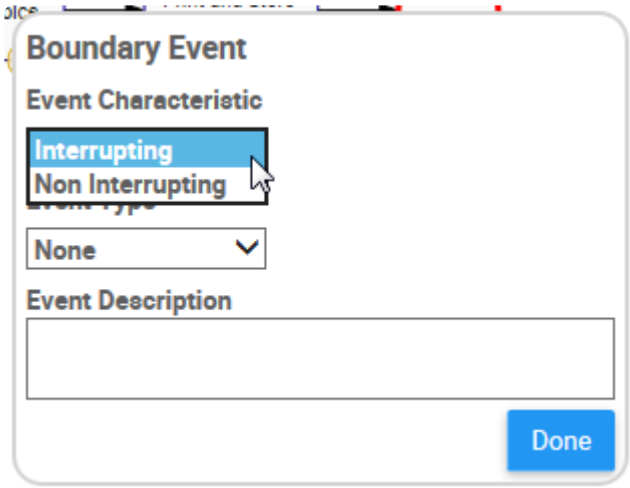


Event Characteristic

i) Navigate to the “Event Characteristic” box

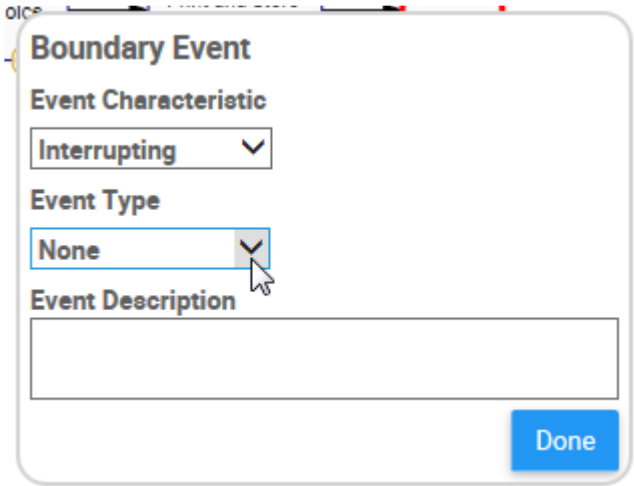


ii) A drop-down list will be generated. Choose the Loop Characteristic for the task

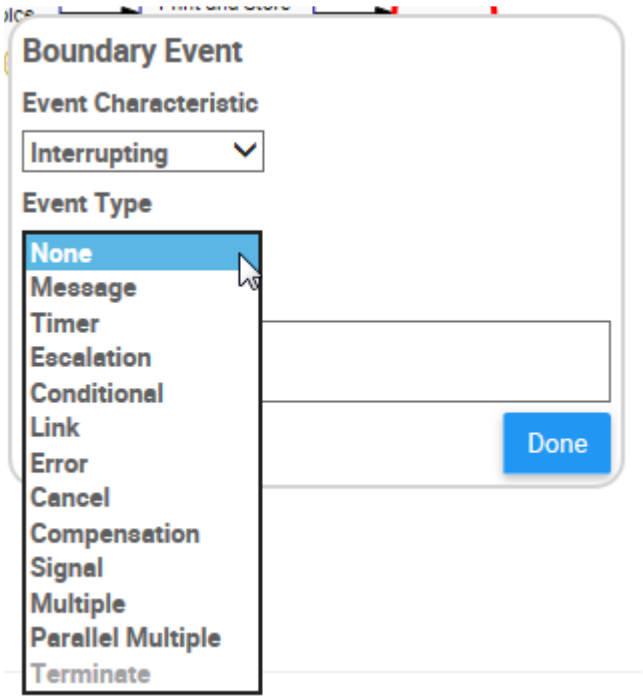


Event Type

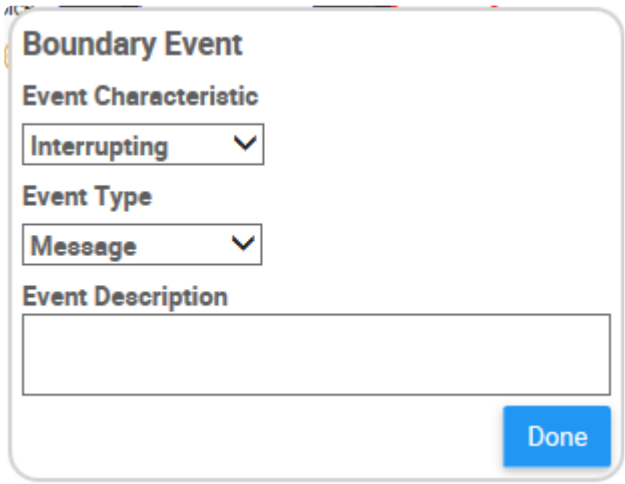
i) Navigate to the “Event Type” box



ii) A drop-down list will be generated

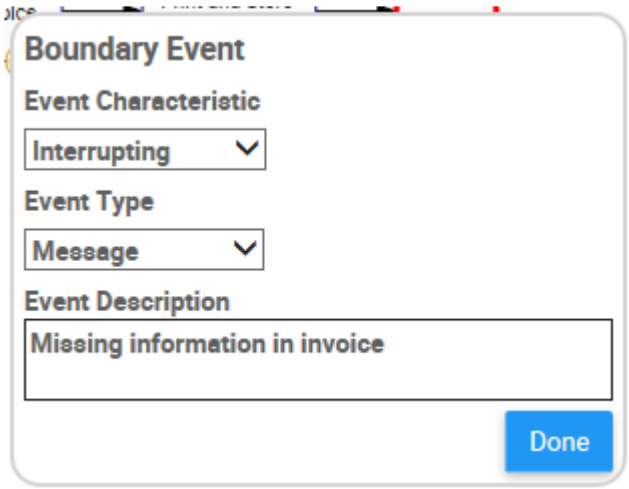


iii) Choose the Event Type

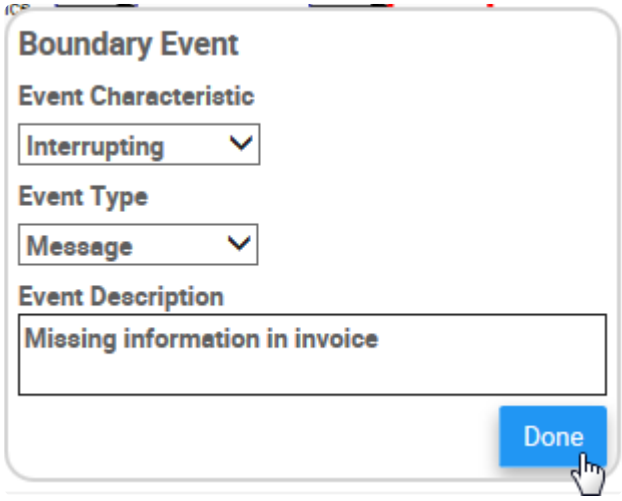


Event Description

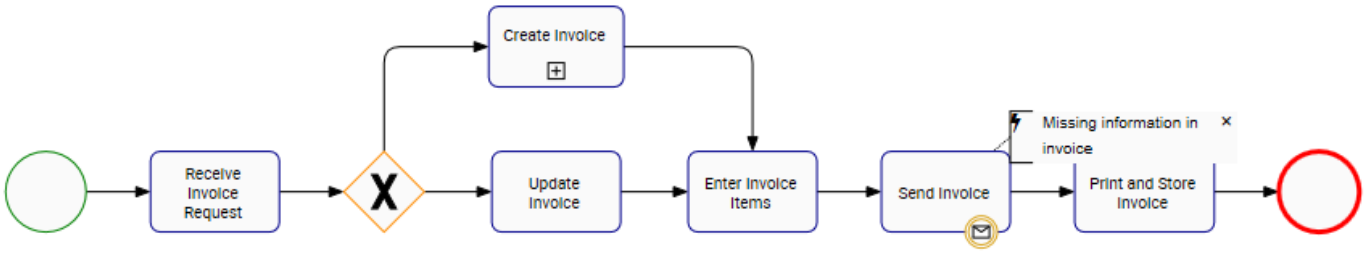
i) Type the Event Description



6. After assigning the Boundary Event BPMN properties, click on the Done icon to close the pop-up



7. The Boundary Event will be displayed on the process map



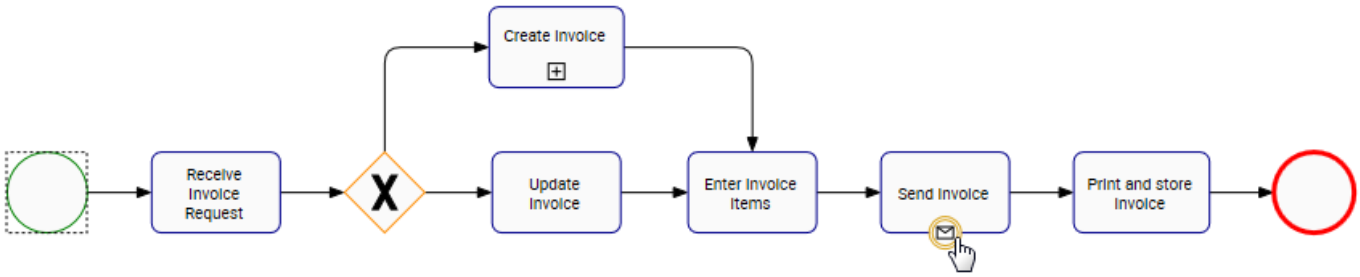
12.2.2.4.3 Remove Boundary Events

To Remove a Boundary Event, please follow the instructions.

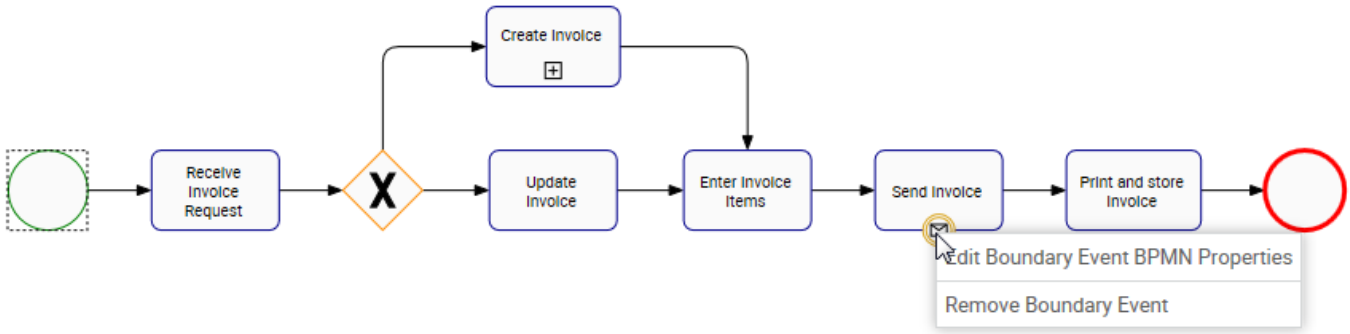
> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

1. Navigate to Full Screen Edit Mode, after clicking on Edit Button

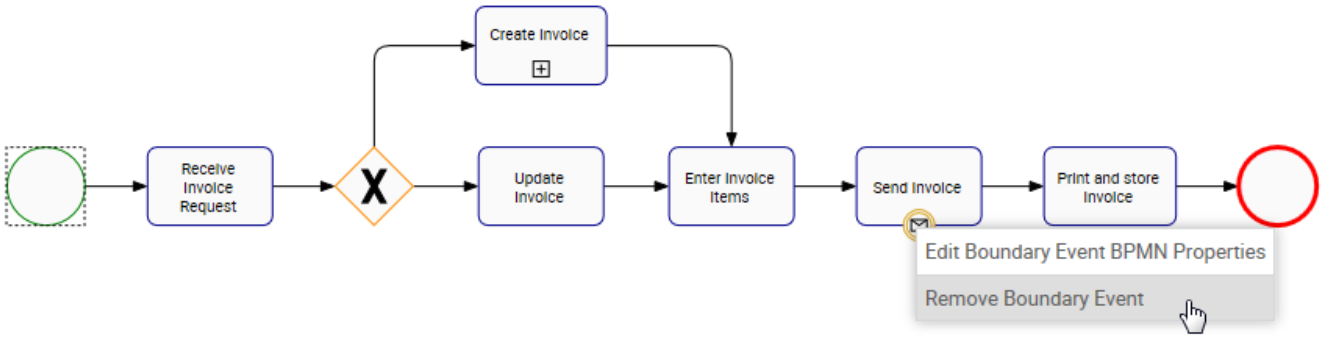
2. Navigate to the icon of the Boundary Event



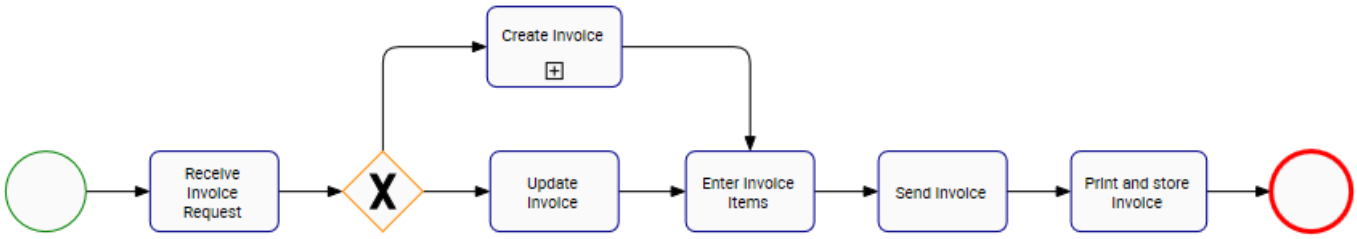
3. Right-click on the Boundary Event. A drop-down menu will be generated



4. Choose the “Remove Boundary Event” box



5. The Boundary Event is removed



12.2.2.5 BPMN Properties

Business Process Modeling Notation (BPMN) is a diagramming notation for business process models. It is emerging as the largest, most widely accepted business process modeling in the industry. BPMN creates a functional flow chart of different processes.

Web Modelers can assign the BPMN properties to Flow Objects when mapping processes on Graph Edit Mode to define business process behaviors.

BPMN Property	Symbol	Flow Object
Ad-hoc	~	Sub-process Task
Compensation		Sub-process Task
Loop Characteristic	Loop: Parallel: Sequential:	Sub-process Task
Task Type	Abstract: no symbol Send: Receive: User: Manual: Business Rule: Service: Script:	Task
Gateway Type	None: no symbol Exclusive: Inclusive: Parallel: Complex: Exclusive – Event Based: Exclusive – Event Based – Start: Parallel – Event Based – Start:	Gateway

Event Characteristic	Start – Interrupting – Catching: Start – Non-Interrupting – Catching: Intermediate – Interrupting – Catching: Intermediate – Non-Interrupting – Catching: Intermediate – Interrupting – Throwing: End – Throwing:	Event
Event Type	None: no symbol Message: Timer: Escalation: Conditional: Link: Error: Cancel: Compensation: Signal: Multiple: Parallel Multiple: Terminate:	Event
Transition Type	Sequence flow: Default Flow: Conditional Flow: Message Flow: Association: Directed Association: Bidirected Association:	Transition

	Conversation:	

Different event types are available depending on the event characteristic selected

This section will cover how to assign BPMN Properties for the following shapes:

1. Sub-Process
2. Task
3. Gateway
4. Event
5. Transition

To learn more about the BPMN methodology and BPMN properties, click here.

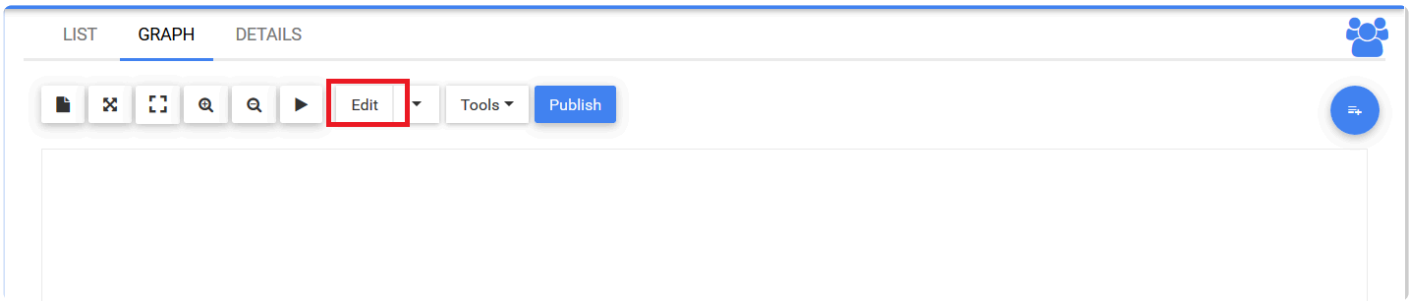
12.2.2.5.1 Sub-Process

Web Modelers can assign the BPMN properties while working on Graph Edit Mode directly to the flow objects.

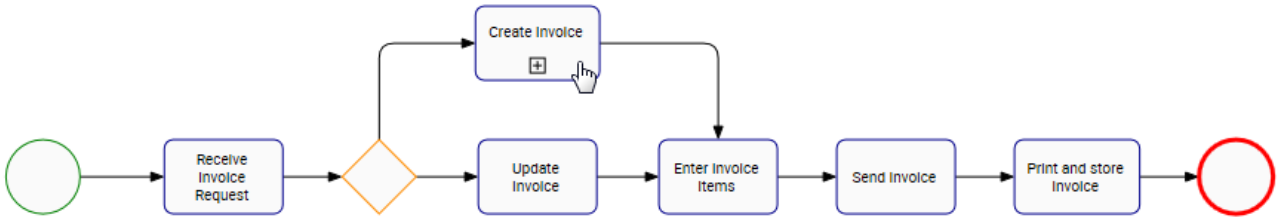
To Assign BPMN Properties to a Sub-Process, please follow the instructions.

> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

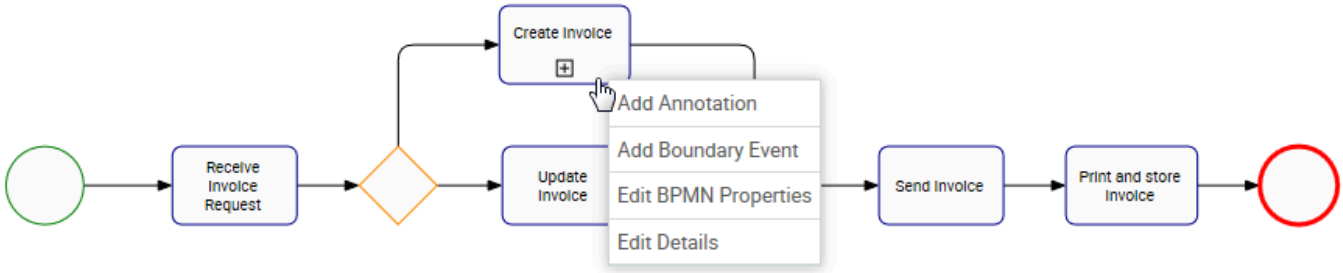
1. Navigate to Full Screen Edit Mode, after clicking on Edit Button



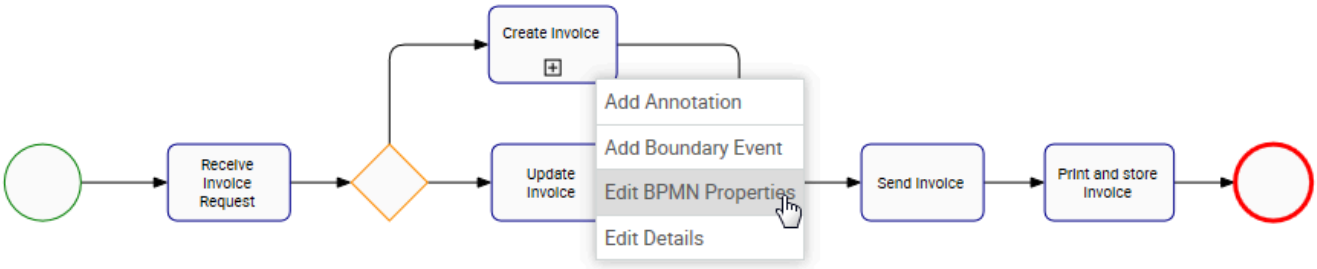
2. Navigate to a Sub-Process shape



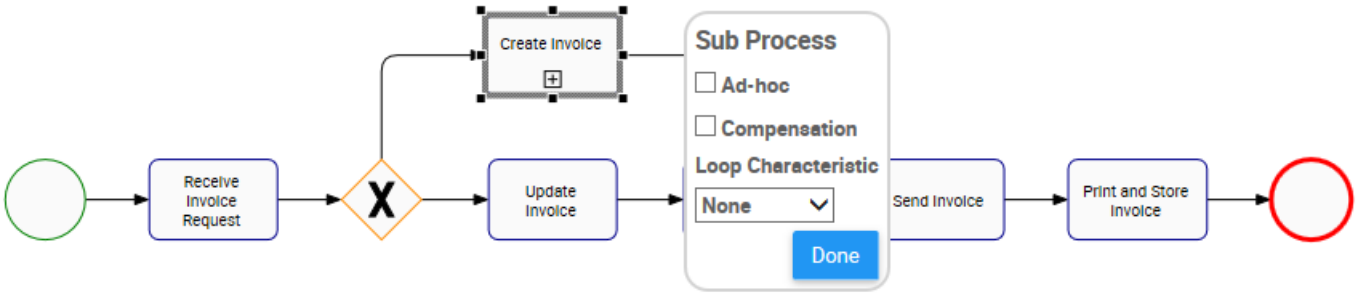
3. Right-click on the Sub-Process shape. A drop-down menu will be generated



4. Choose the “Edit BPMN Properties” box

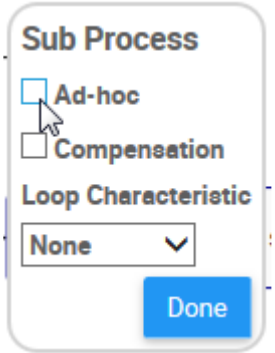


5. A pop-up will be generated allowing you to choose the BPMN Properties for the sub-process

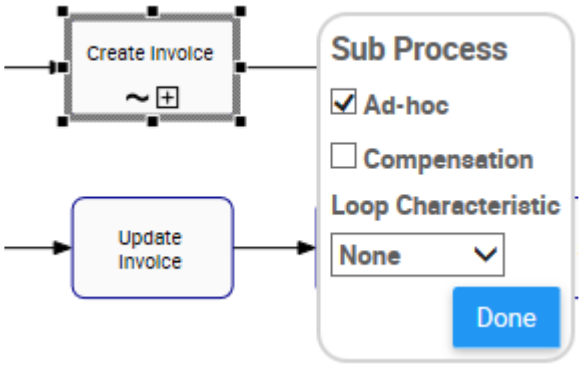


Ad-Hoc

i) Navigate to the “Ad-Hoc” box

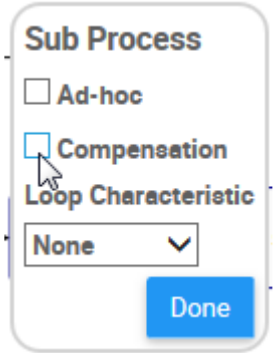


ii) Click on the box to check the sub-process with the Ad-Hoc property.

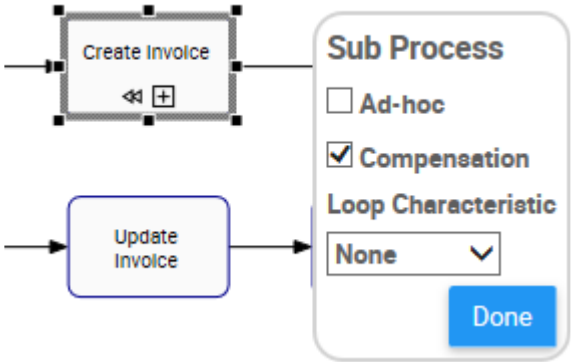


Compensation

i) Navigate to the “Compensation” box

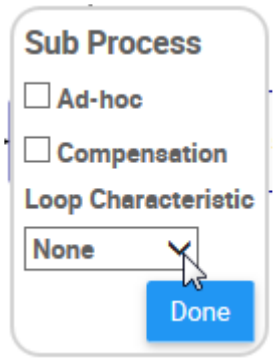


ii) Click on the box to check the sub-process with the Compensation property.

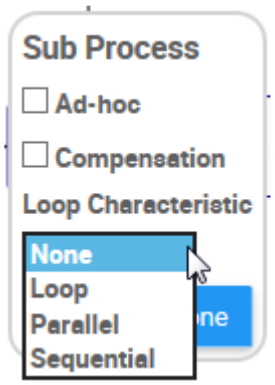


Loop Activity

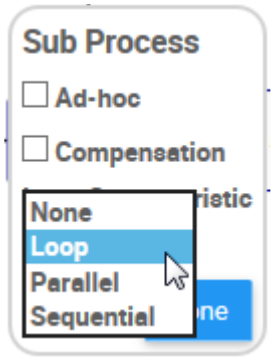
i) Navigate to the “Loop Characteristic” box



ii) A drop-down list will be generated

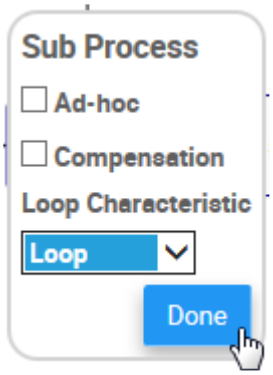


iii) Choose the Loop Characteristic for the sub-process



6. After assigning the BPMN properties for the Sub-Process, click on the

button to close the pop-up


Sub Process
Ad-hoc
Compensation
Loop Characteristic
Loop
Done

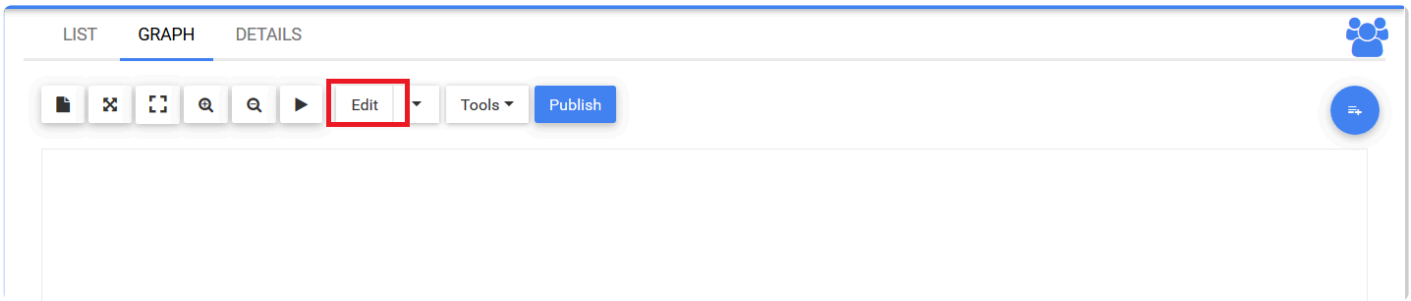
12.2.2.5.2 Task

Web Modelers can assign the BPMN properties while working on Graph Edit Mode directly to the shapes.

To Assign BPMN Properties to a Task, please follow the instructions.

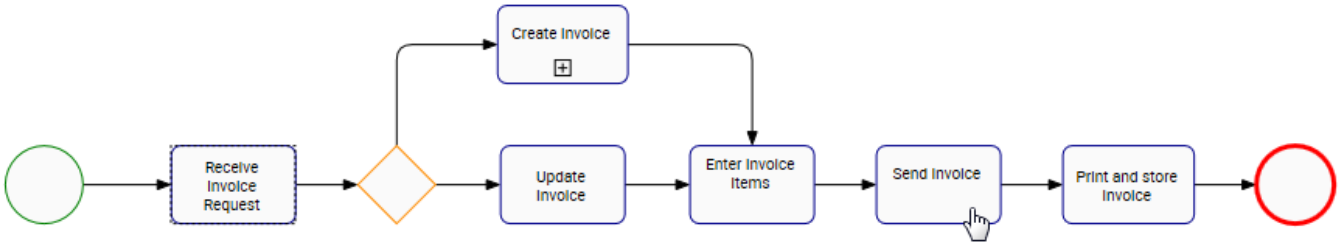
> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

1. Navigate to Full Screen Edit Mode, after clicking on Edit Button

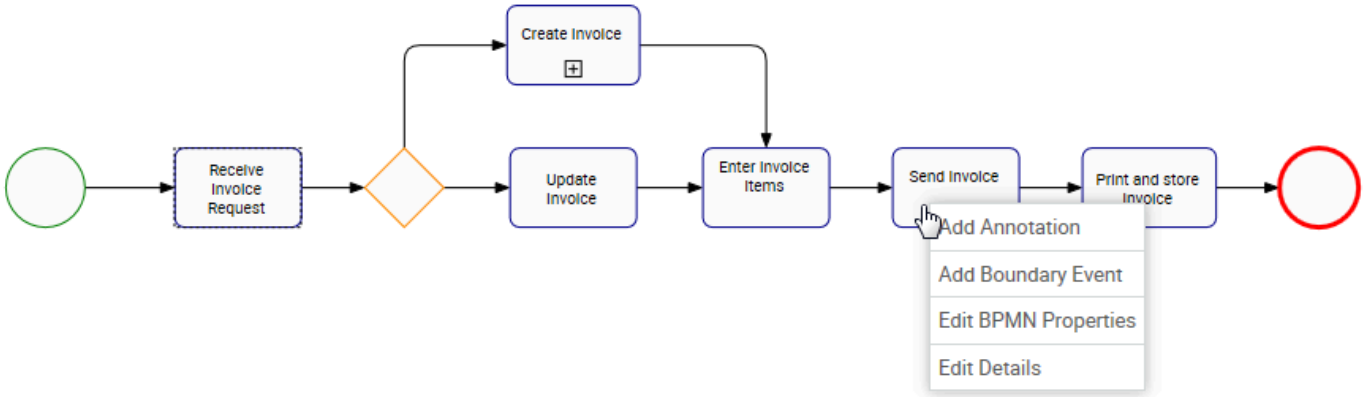


}!

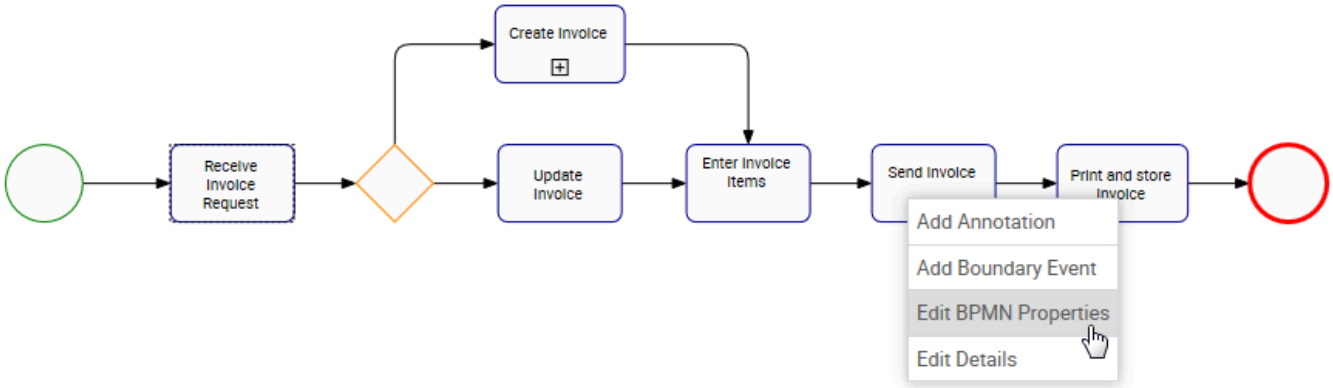
2. Navigate to a Task shape



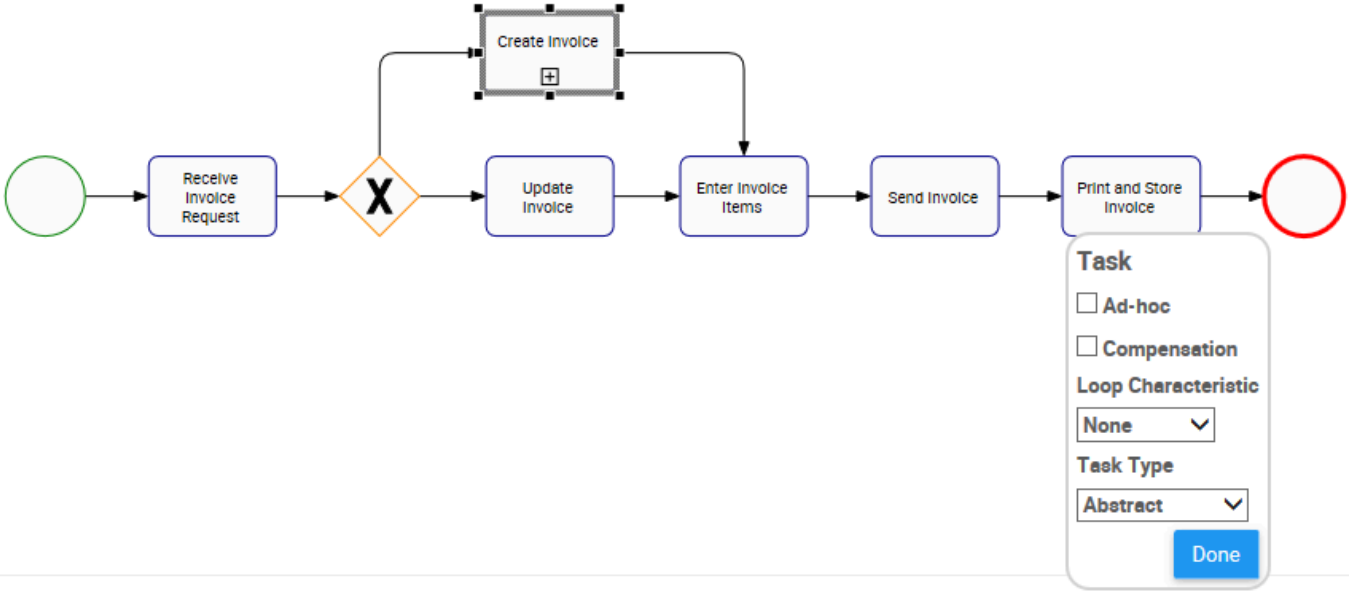
3. Right-click on the Task shape. A drop-down menu will be generated



4. Choose the “Edit BPMN Properties” box

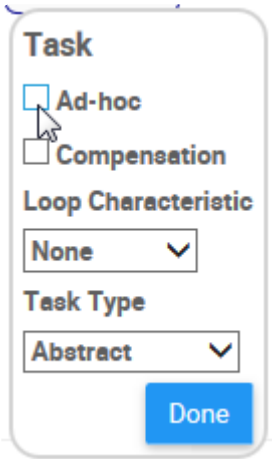


5. A pop-up will be generated allowing you to choose the BPMN Properties for the task

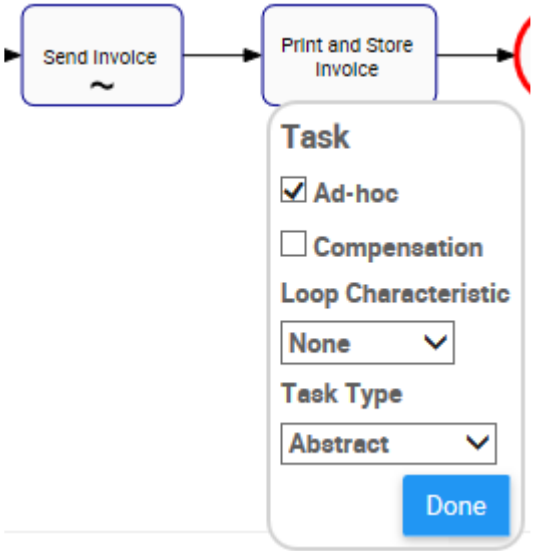


Ad-Hoc

i) Navigate to the “Ad-Hoc” box

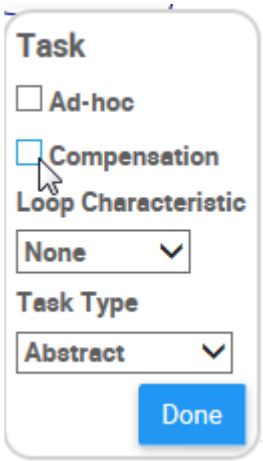


ii) Click on the box to check the task with the Ad-Hoc property.

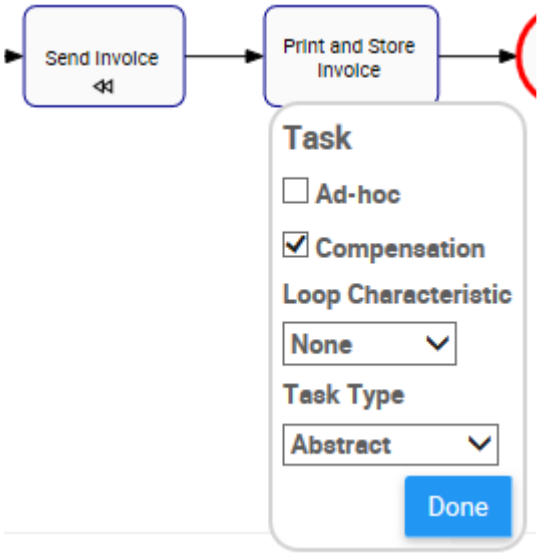


Compensation

i) Navigate to the “Compensation” box

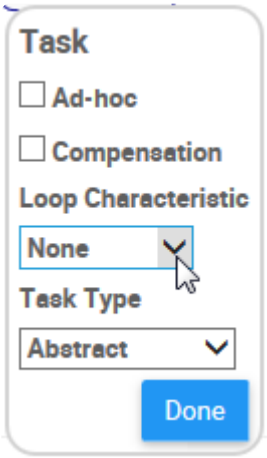


ii) Click on the box to check the task with the Compensation property.

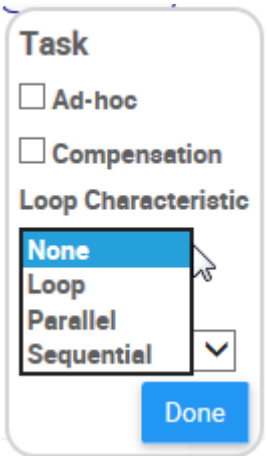


Loop Activity

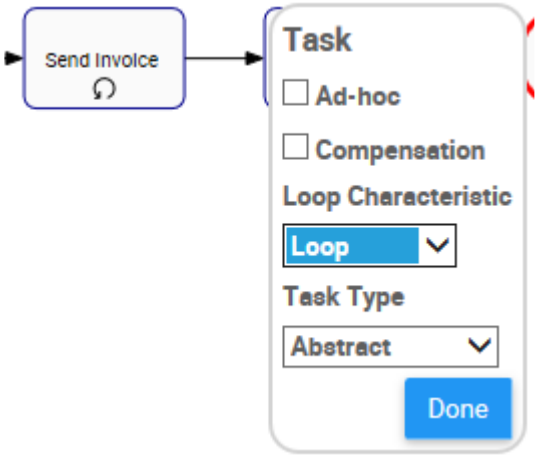
i) Navigate to the “Loop Characteristic” box



ii) A drop-down list will be generated

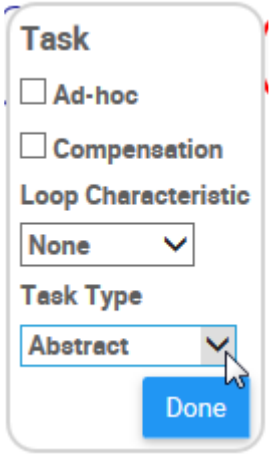


iii) Choose the Loop Characteristic for the task

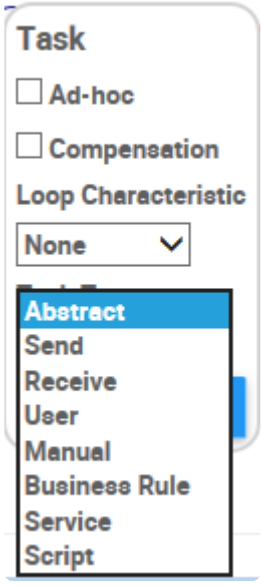


Task Type

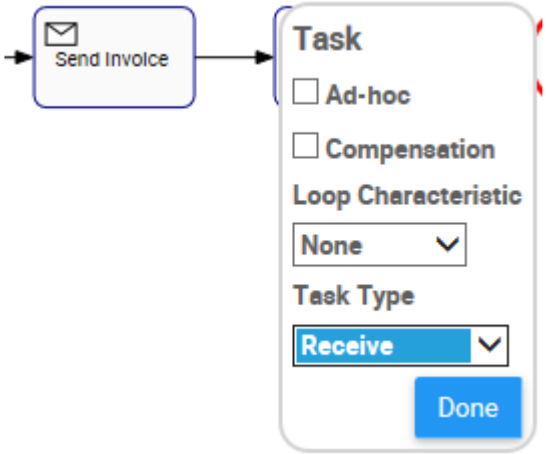
i) Navigate to the “Task Type” box



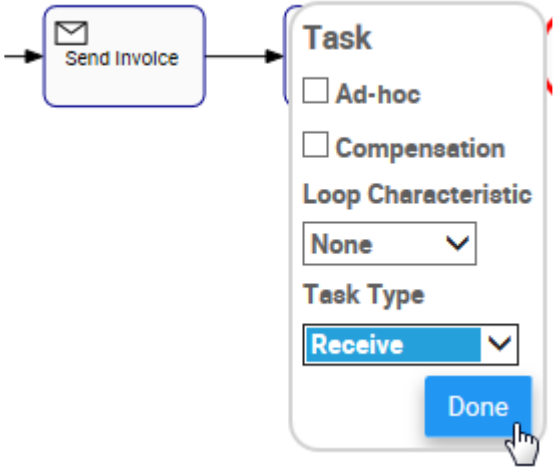
ii) A drop-down list will be generated



iii) Choose the Task Type



6. After assigning the BPMN properties for the Task, click on the Done button to close the pop-up



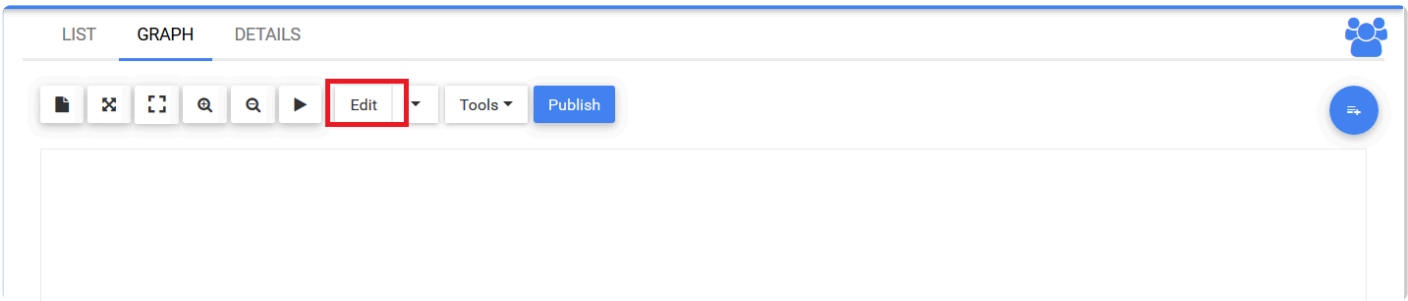
12.2.2.5.3 Gateway

Web Modelers can assign the BPMN properties while working on Graph Edit Mode directly to the shapes.

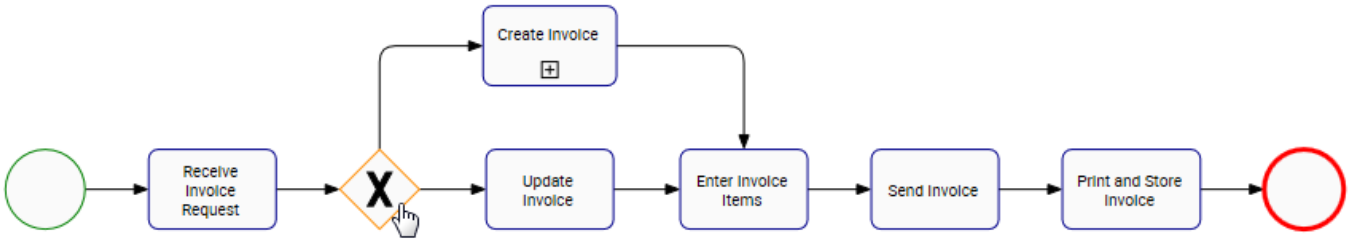
To Assign BPMN Properties to a Gateway, please follow the instructions.

> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

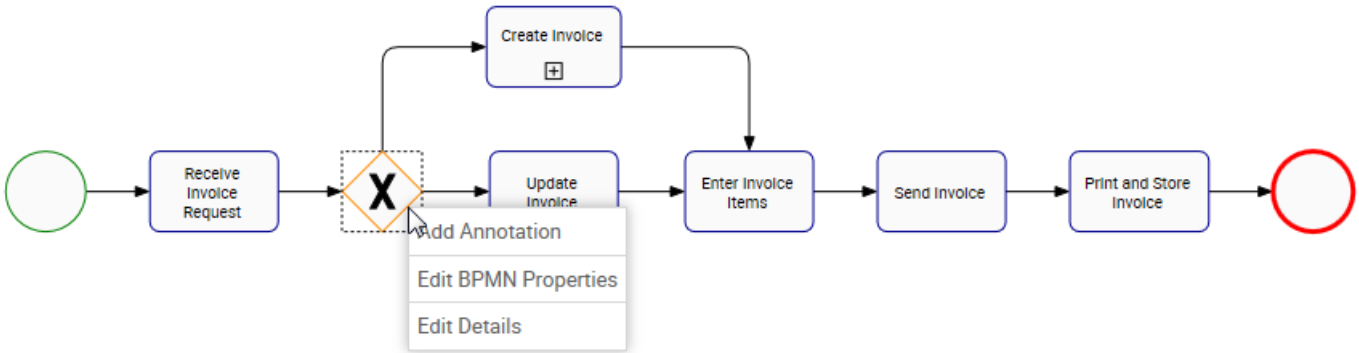
1. Navigate to Full Screen Edit Mode, after clicking on Edit Button



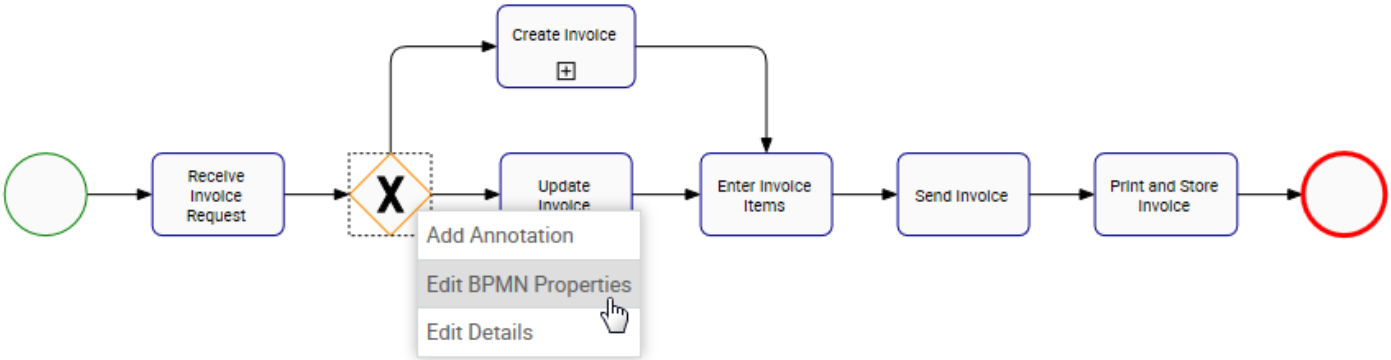
2. Navigate to a Gateway shape



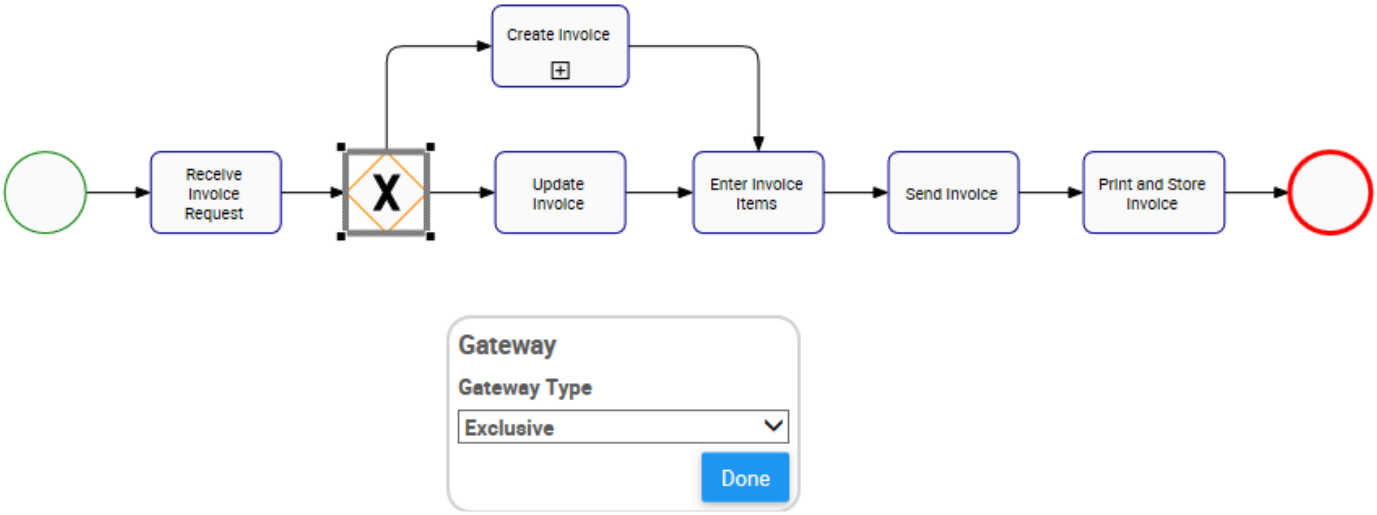
3. Right-click on the Gateway. A drop-down menu will be generate



4. Choose the “Edit BPMN Properties” box

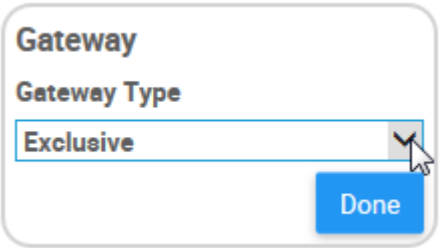


5. A pop-up will be generated allowing you to choose the BPMN Properties for the gateway

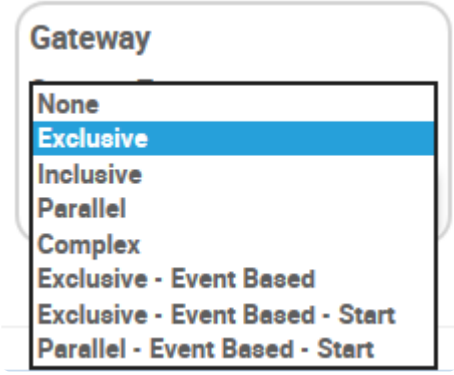


Gateway Type

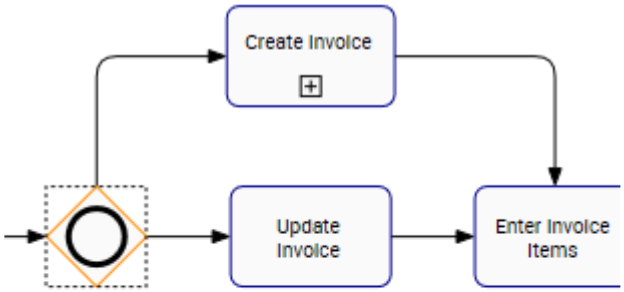
i) Navigate to the “Gateway Type” box

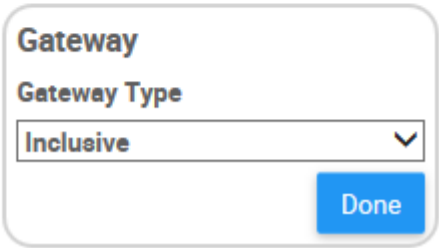


ii) A drop-down list will be generated

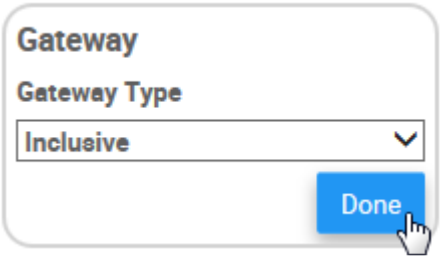


iii) Choose the Gateway Type





6. After assigning the BPMN properties for the Gateway, click on the Done button to close the pop-up



12.2.2.5.4 Event

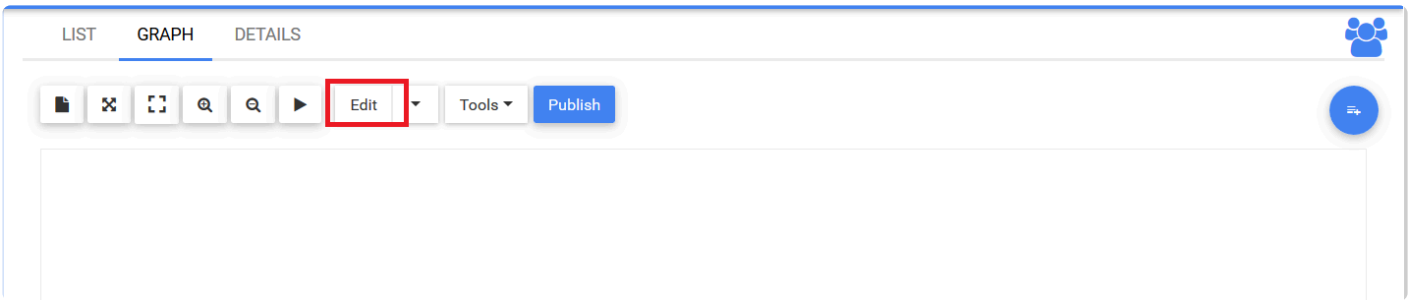
Web Modelers can assign the BPMN properties while working on Graph Edit Mode directly to the shapes.

To Assign BPMN Properties to an Event, please follow the instructions.

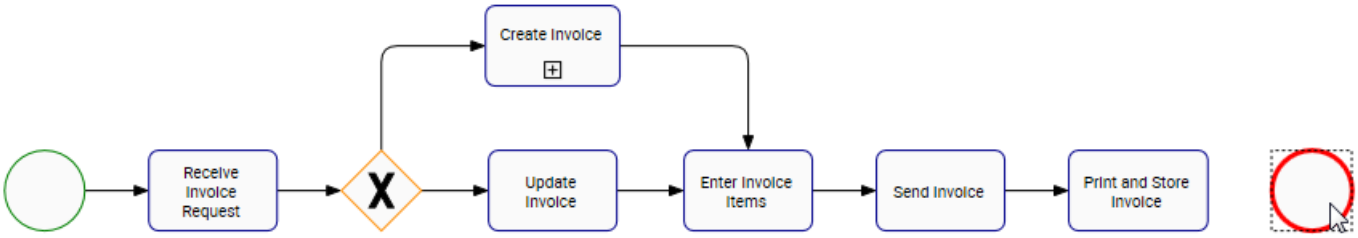
> The same instructions apply to a Start or End event

> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

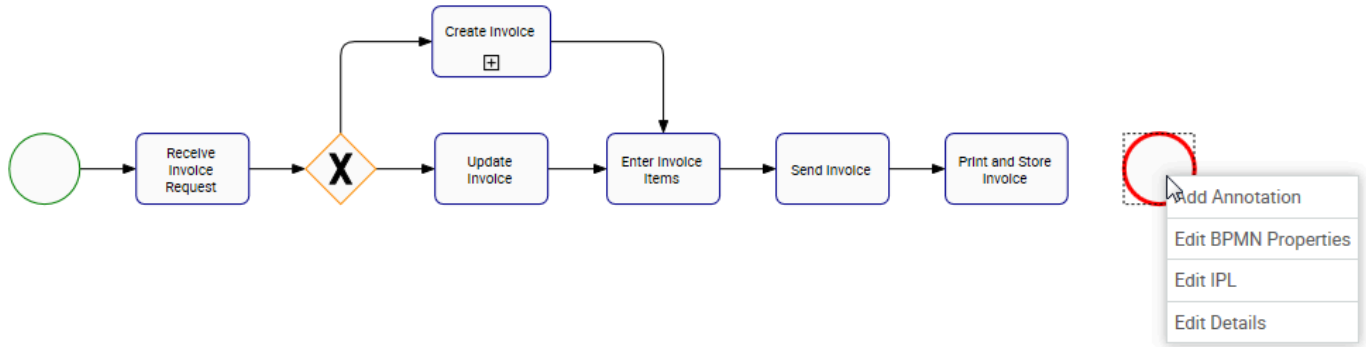
1. Navigate to Full Screen Edit Mode, after clicking on Edit Button



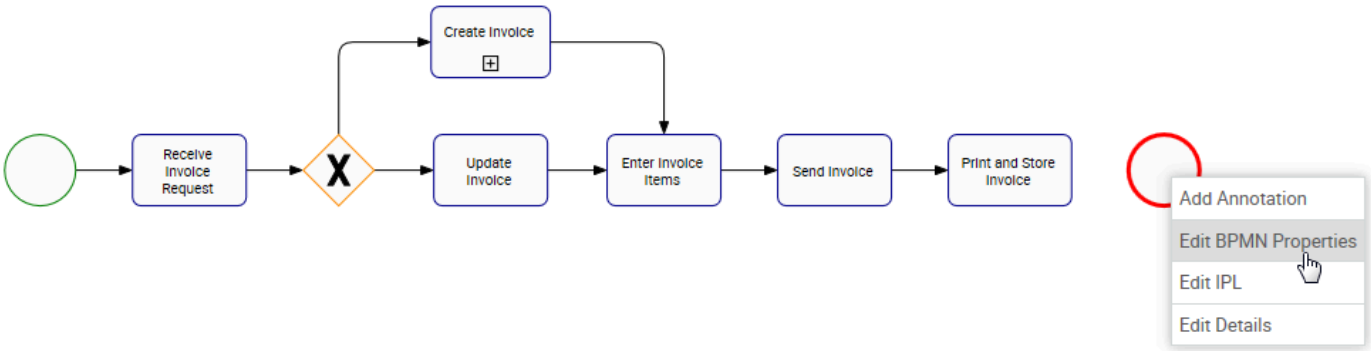
2. Navigate to an Event shape



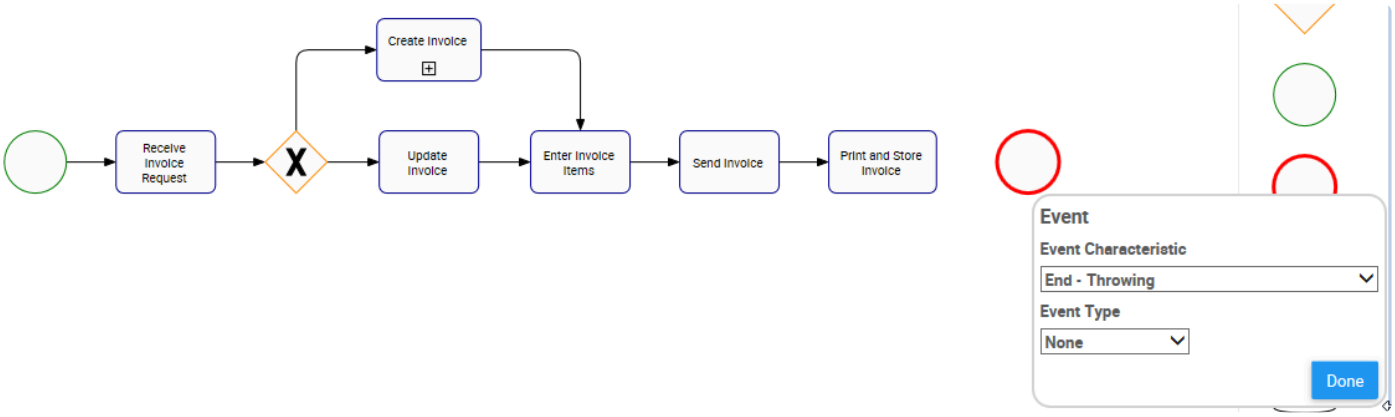
3. Right-click on the Event shape. A drop-down menu will be generate



4. Choose the “Edit BPMN Properties” box

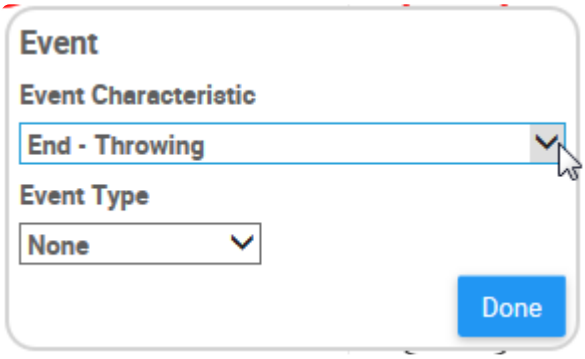


5. A pop-up will be generated allowing you to choose the BPMN Properties for the event

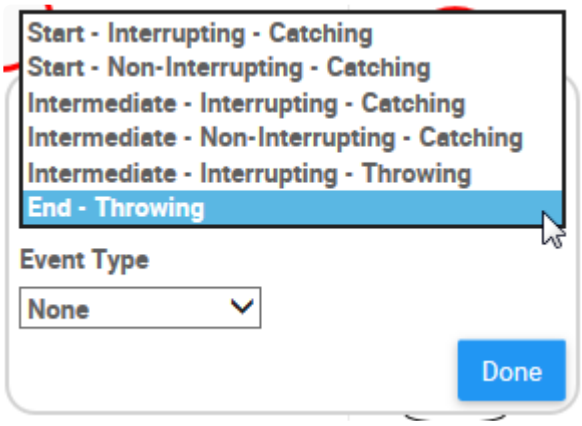


Event Characteristic

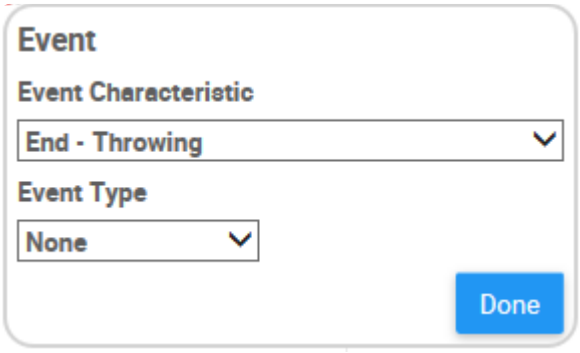
i) Navigate to the “Event Characteristic” box



ii) A drop-down list will be generated



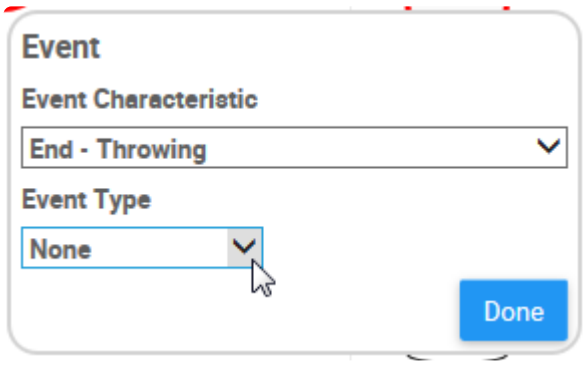
iii) Choose the Event Characteristic



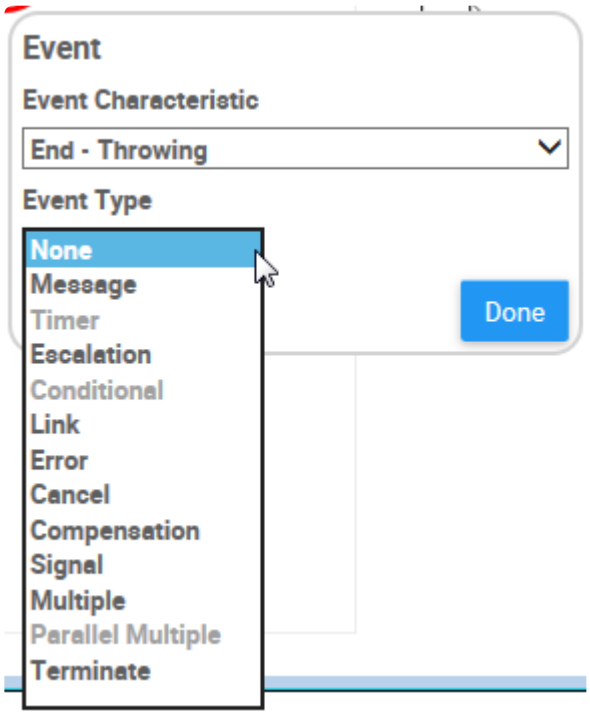
If there is a source or target transition from or to the Event shape, you will not be able to modify the Event Characteristic.

Event Type

i) Navigate to the “Event Type” box

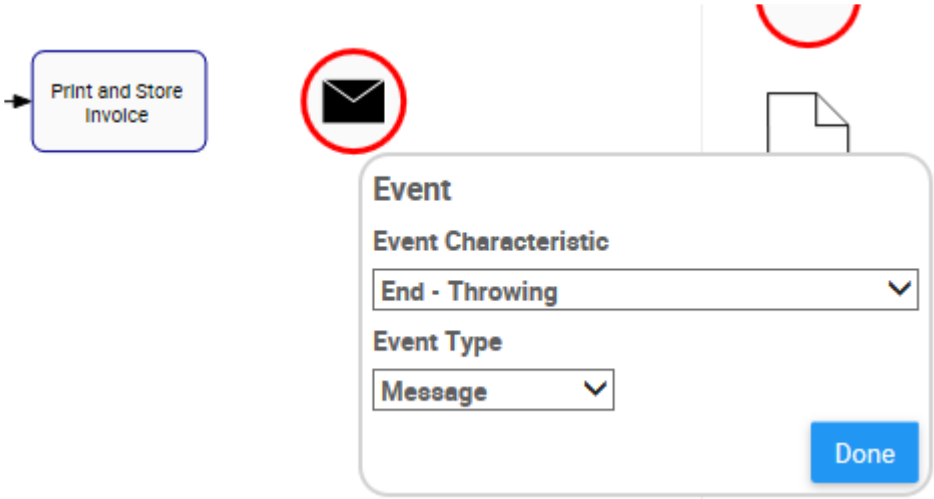


ii) A drop-down list will be generated

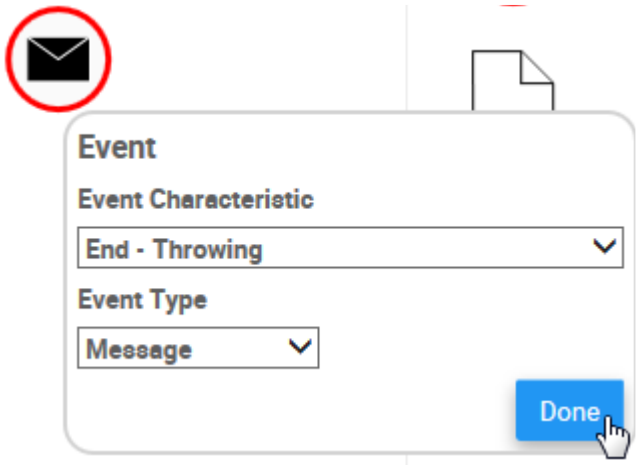


Different event types are available depending on the event characteristic selected

iii) Choose the Event Type



6. After assigning the BPMN properties for the Event, click on the ✕ icon to close the pop-up



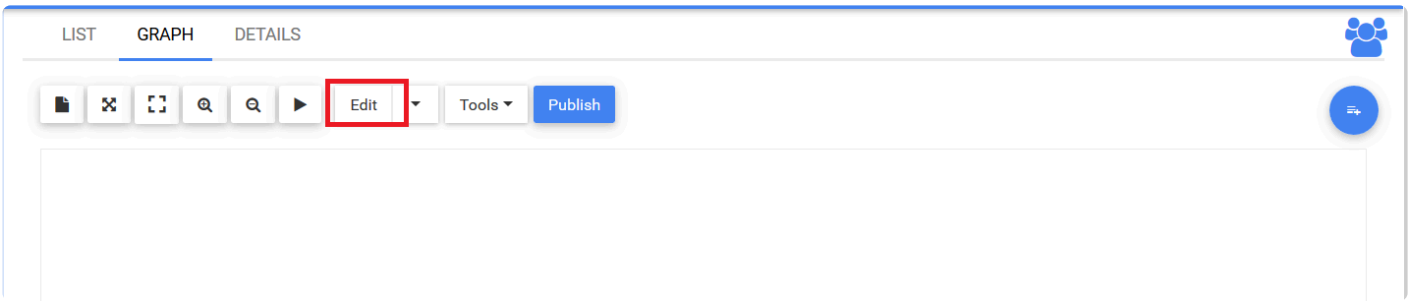
12.2.2.5.5 Transition

Web Modelers can assign the BPMN properties while working on Graph Edit Mode directly to the shapes.

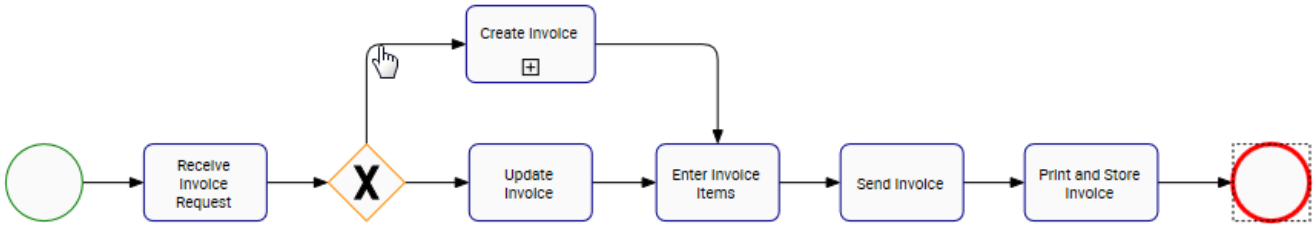
To Assign BPMN Properties to a Transition, please follow the instructions.

> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

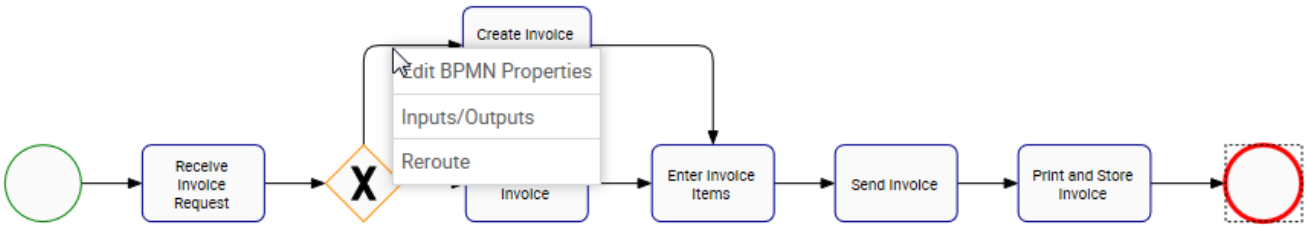
1. Navigate to Full Screen Edit Mode, after clicking on Edit Button



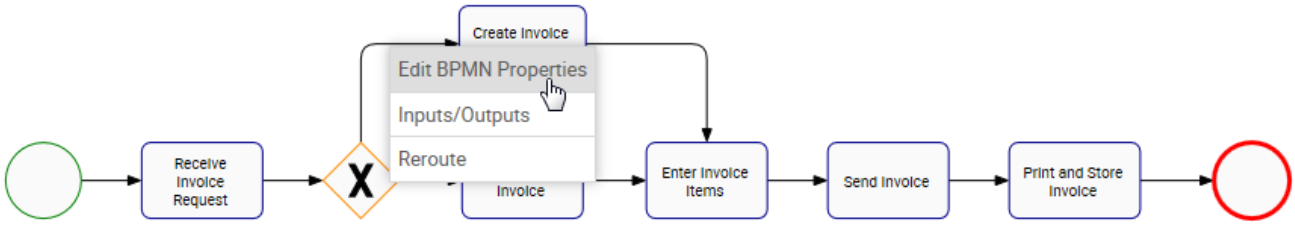
2. Navigate to a Transition



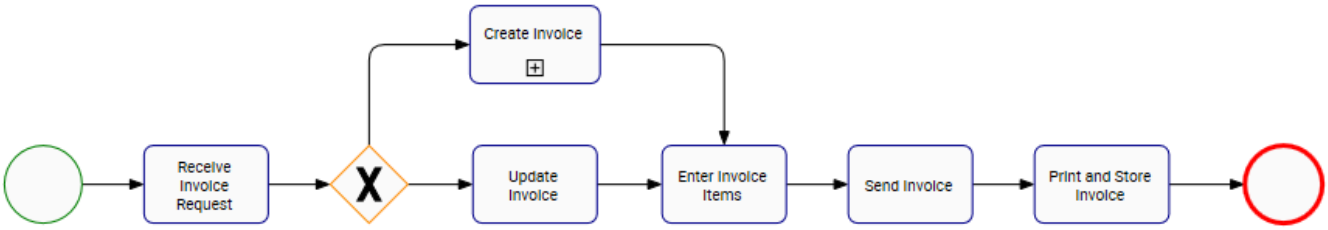
3. Right-click on the Transition. A drop-down menu will be generate

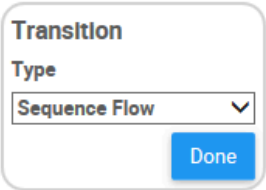


4. Choose the “Edit BPMN Properties” box



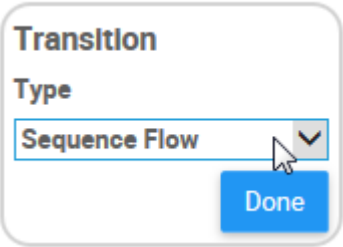
5. A pop-up will be generated allowing you to choose the BPMN Properties for the transition



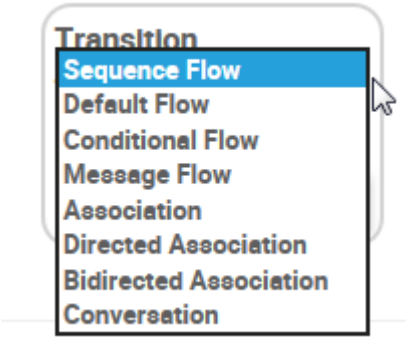


Type

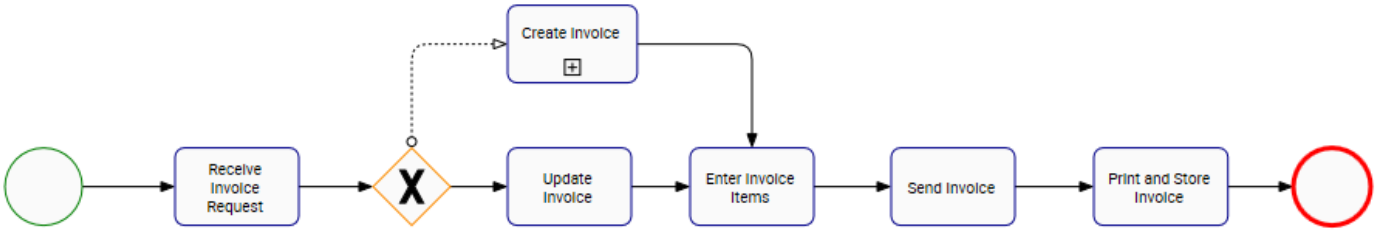
i) Navigate to the “Type” box

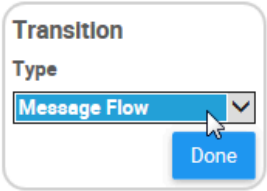


ii) A drop-down list will be generated

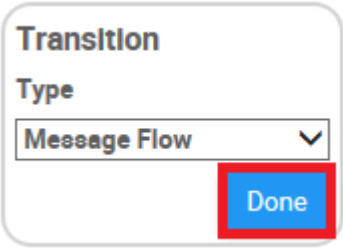


iii) Choose the Event Characteristic for the gateway





6. After assigning the BPMN properties for the Event, click on the Done box to close the pop-up



Transitions connected to an artifact or database will automatically have the directed association type, and it cannot be modified

12.2.2.6 IPLs

Inter-process links (IPL) are used to link one BPMN Shape (Flow Object) to another.

IPLs originate from the **Source** of the link (End Events) and are connected to the **Target** of the link (Start Events). This can be done within the same process as a Intra-Process Link or from one Process to another as a Inter-Process Link.

> Intra-Process Links are useful to avoid clutter within a map where a BPMN Shape later in the process must loop back to somewhere in the beginning or vice-versa. It avoids having a transition that crosses the entire map from one shape to another.

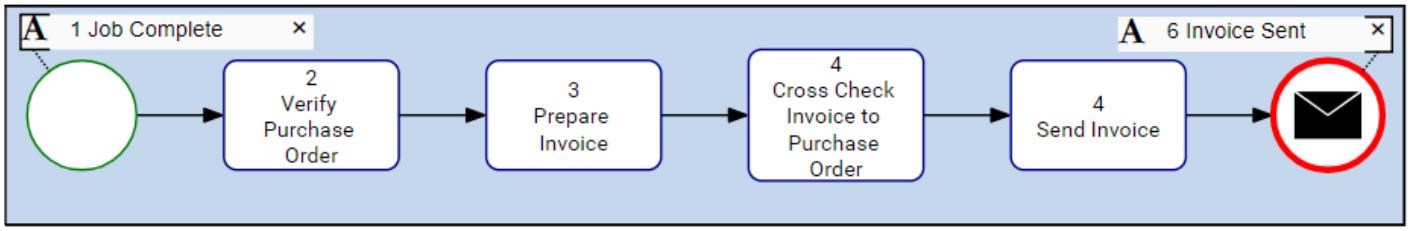
Web Modelers can create IPLs on Start and End events when mapping processes in Graph Edit Mode.

Create IPLs

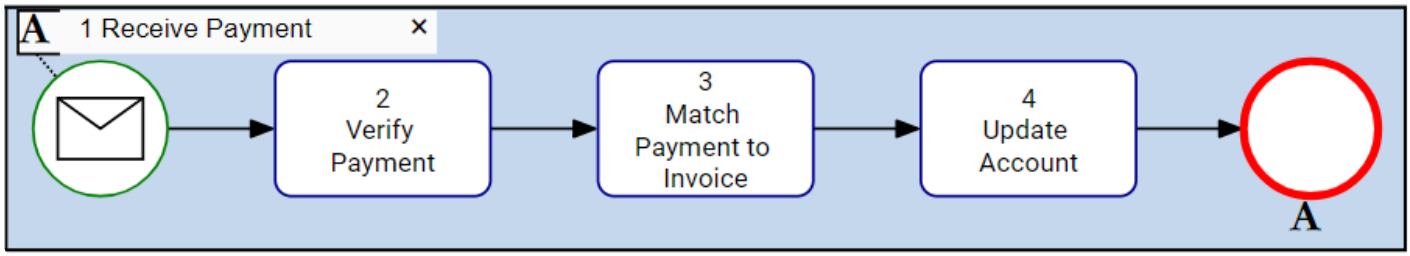
1. Identify the processes and shapes you will link

In this example, an IPL will be created between the End event “Invoice Sent” of the “Send Invoice to Client” process, and the Start event “Receive Payment” of the “Receive Payment” process (shown below).

Send Invoice to Client



Receive Payment



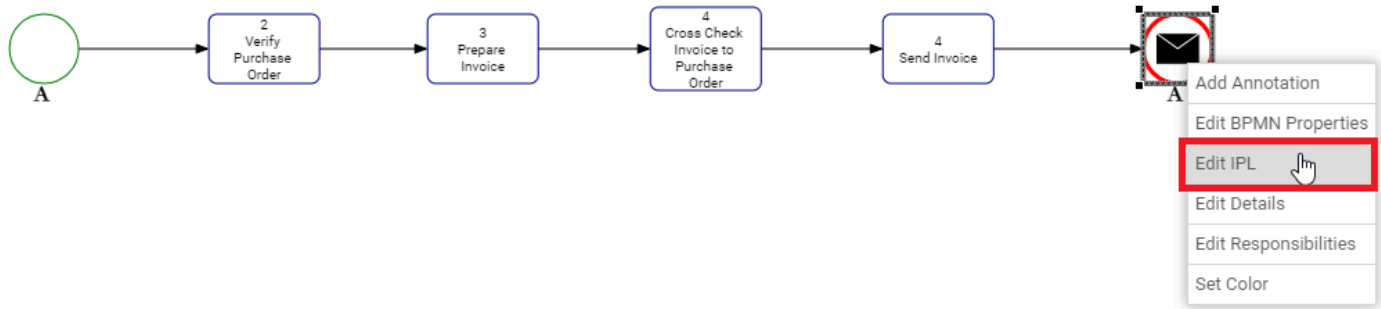
2. Select the Source End event or the Target Start event

You can create the IPL from either the Source or Target event.

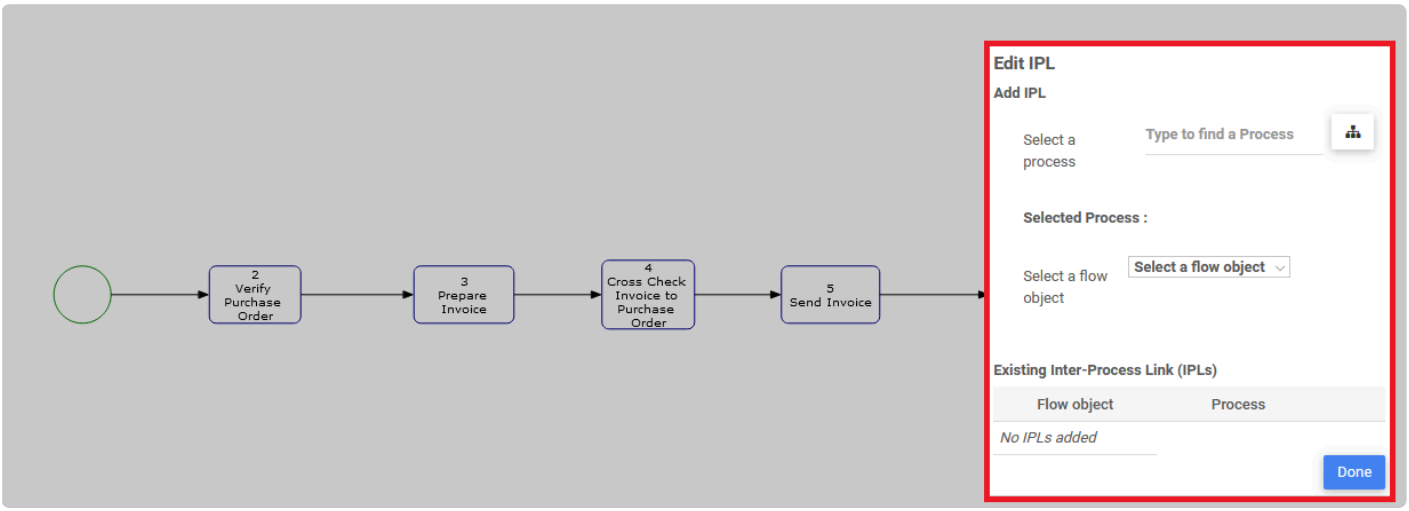
In this example, the Source End event will be used to create the IPL, but the same instructions apply if you select the Target Start event.

3. Edit IPL

Right click on the Source or Target event and select **Edit IPL**.



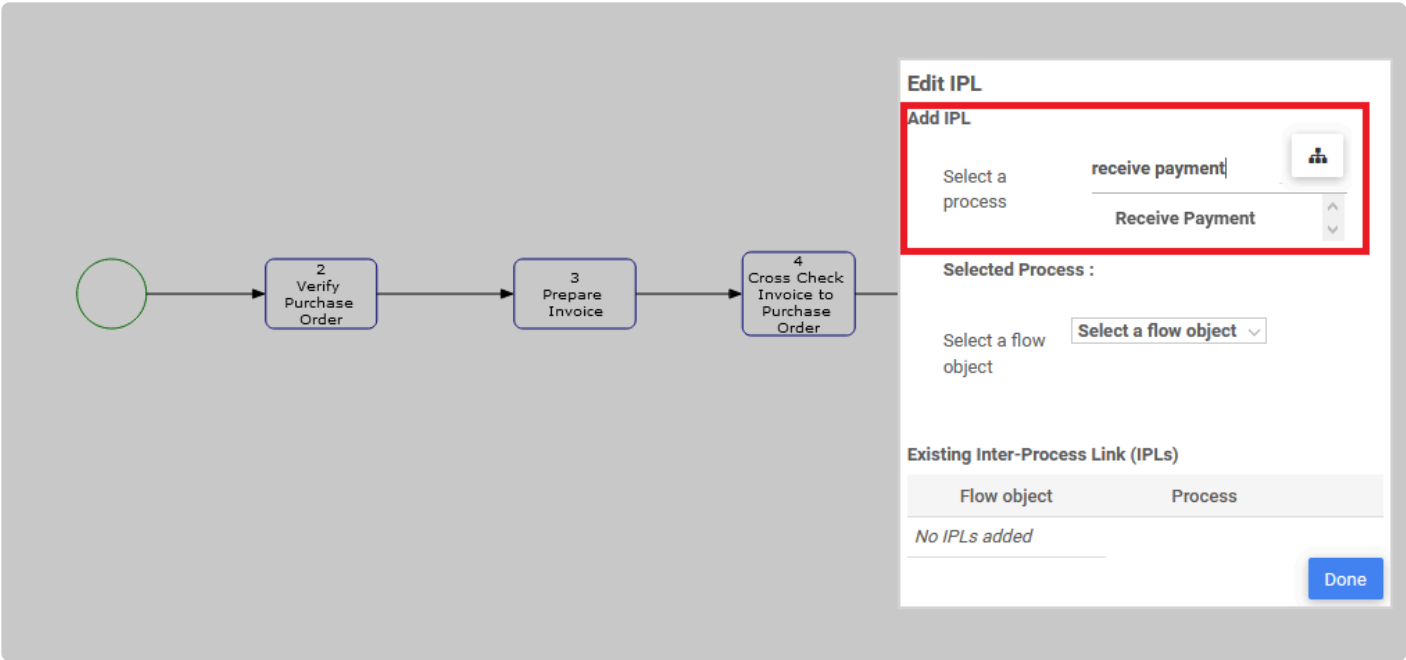
This will open the **Edit IPL** interface.



4. Search for the process

Type the name of the process in the search bar or click on the tree selector to choose a process.

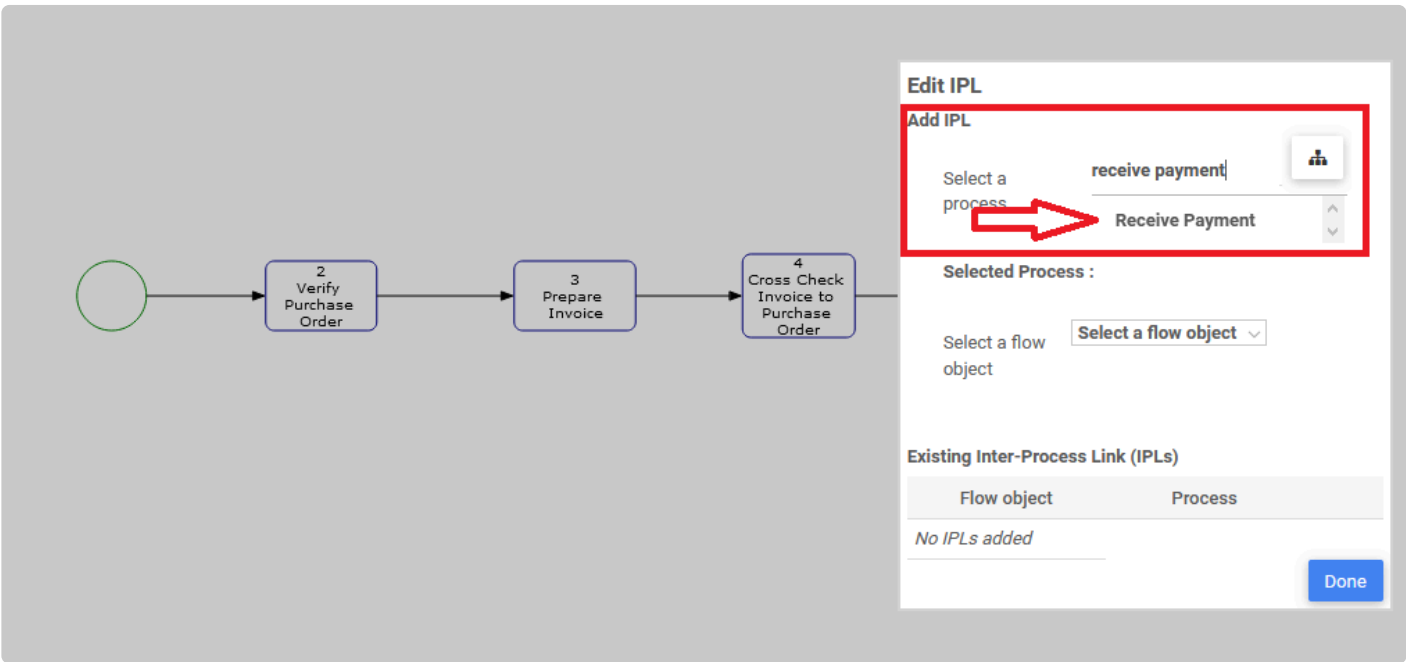
In this example, we are linking the source end event “Invoice Sent” to the target start event “Receive Payment” of the process **“Receive Payment”**.



5. Select the process

In the list of search suggestions for processes, click to select the desired process.

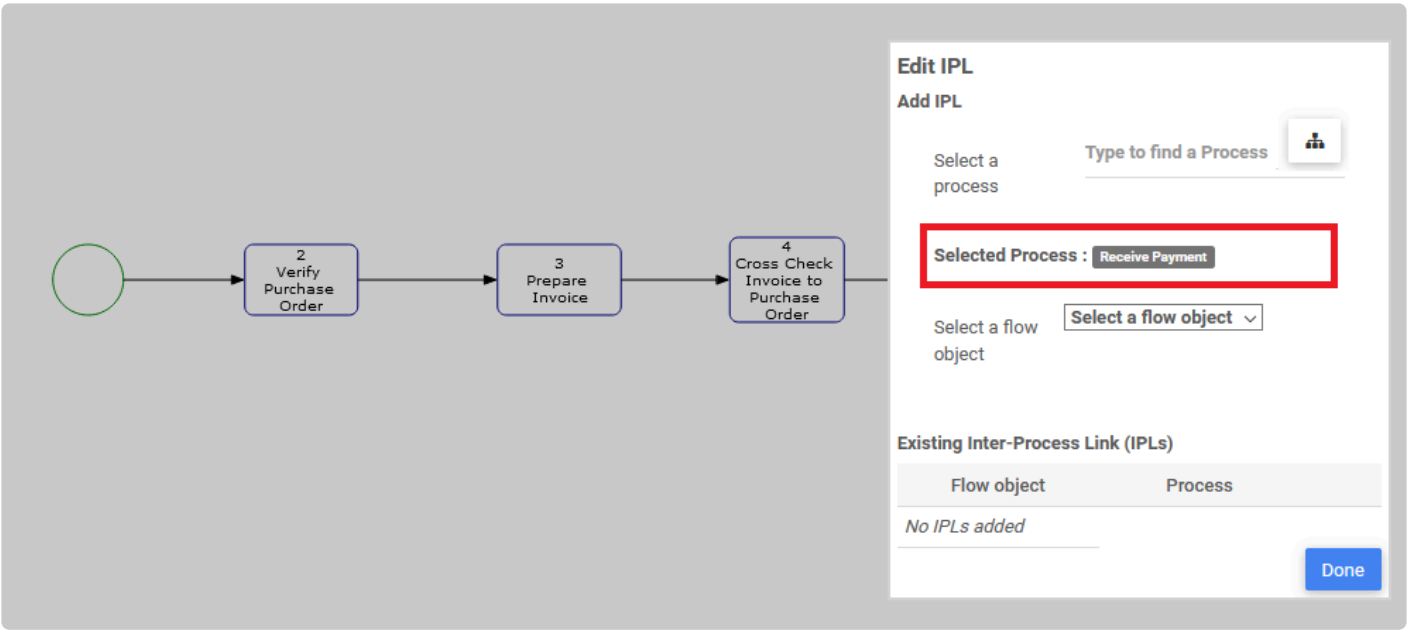
You will see the selected process name appear here.



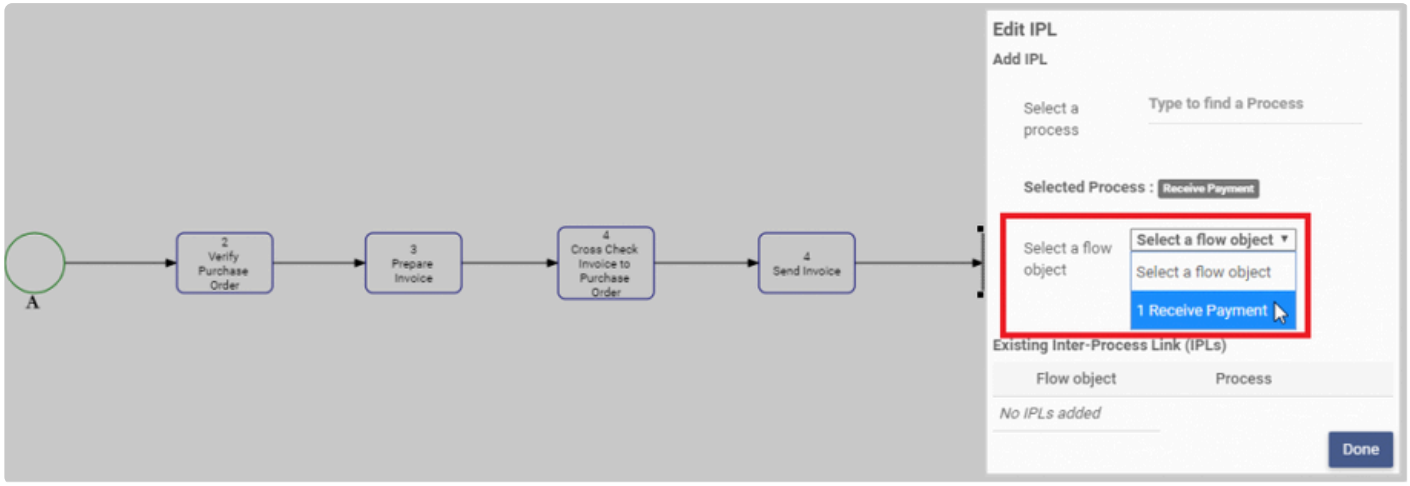
6. Select the Source or Target event

Once the process is selected, the drop-down menu for “Select a Flow Object” will display all Start and End events of the selected process.

In this example, the Start event “Receive Payment” will be selected.

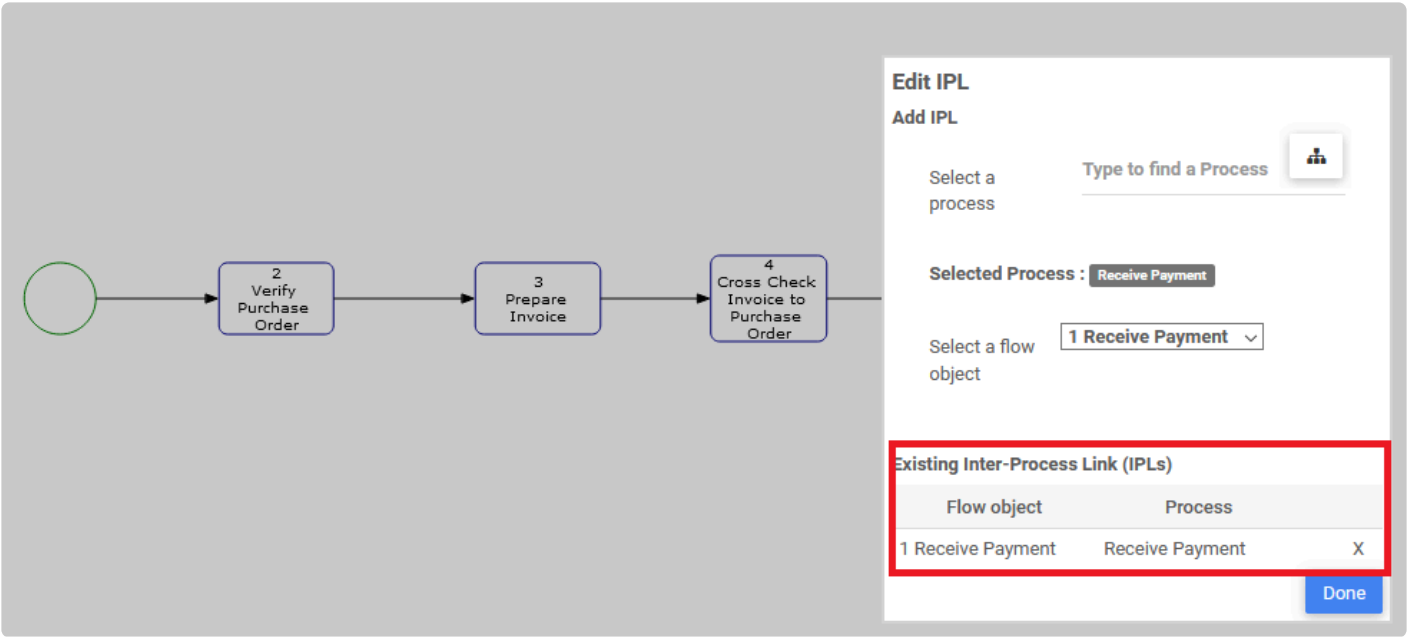


The Source or Target event will appear in the table under “Existing Inter-Process Links”

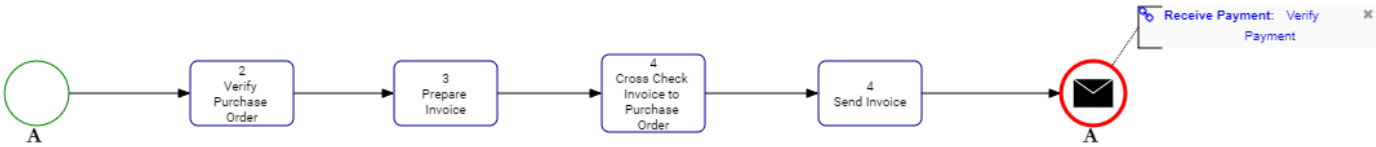


7. Click “Done”

Once the IPL is created, you will see the annotation appear on the relevant Start or End event. The annotation contains a hyperlink with name of the Process and Start or End event on the other end of the IPL as shown below.



If you save and close edit mode and navigate to the process on the other end of the IPL, you will see a similar annotation containing the hyperlink to the other process.



> The same event can have one or more IPLs to other processes and events. To create another IPL, repeat steps 1 to 7 above.

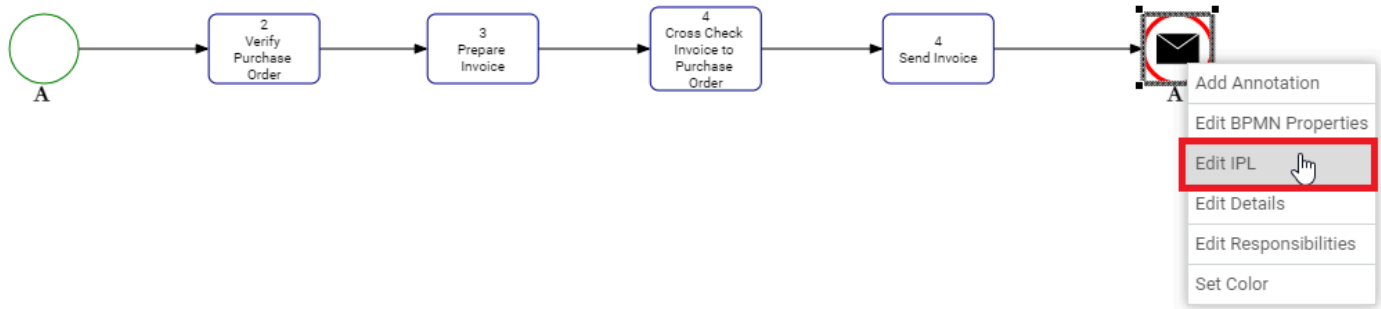
Remove IPLs

1. Select the Source End event or the Target Start event

Select the Source or Target event where containing the IPL you want to remove.

2. Edit IPL

Right click on the Source or Target event and select **Edit IPL**.



3. Remove the IPL

In the table under “Existing Inter-Process Links”, identify the flow object for the IPL you want to remove and click the **“X”** to remove it.

4. Click “Done”

Once the IPL is removed, it will no longer appear in the IPL annotation for the process.

Rules for assigning processes

- Under process, on the left or right side, you can only select below the process set level
- A user cannot select and assign the same process to itself, and if a user tries then they will receive an error message
- Only valid process can be selected, if not the user will receive an error message
- A user can only select process, not flowobjects, and not the entire process folder
- A user can only select a flowobject event after the user choose the process either from the tree selector or by typing in the name
- A user can only select one flowobject per IPL
- The behaviour of swimlane map and flat map should be the same as it is currently is when it comes to linking two process through IPL
- The behaviour of rasci with swimlane is to stay the same when linking two process with the same rasci or different rasci
- The graph view preference will always depend on the first process and the linked IPL process will be converted to that view

12.2.2.7 Edit Details

Web Modelers can access the Edit Details Window while they map processes in Graph Edit Mode.. The Edit Details window will appear in the Graph Edit Mode, and the EPC automatically saves the latest version of the map.

This section will cover the following:

1. Edit the details for a shape on the map
2. Edit the details for the process

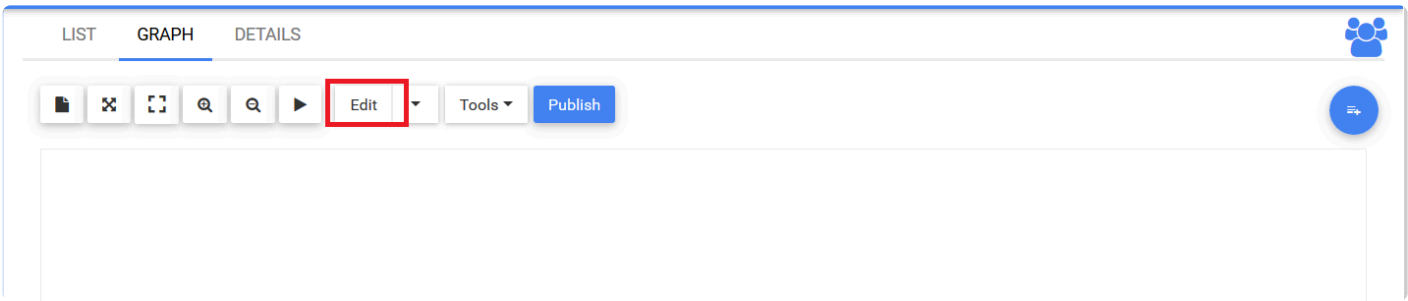
12.2.2.7.1 Edit Shape Details

Web Modelers can edit the Details of any shape while mapping a process on Graph Edit Mode.

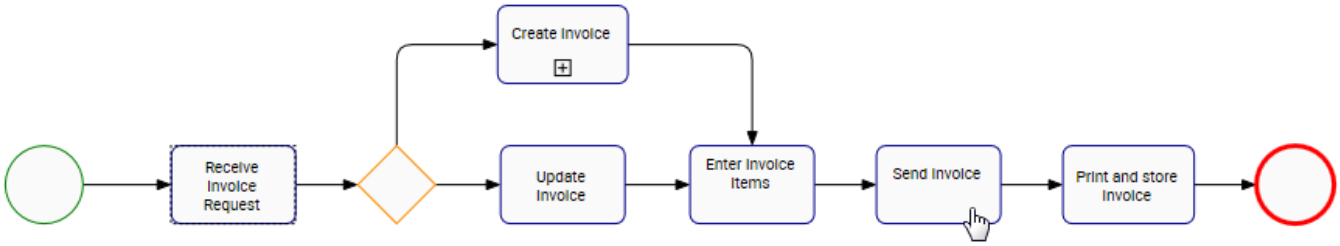
To Edit the Details of a Shape, please follow the instructions.

> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

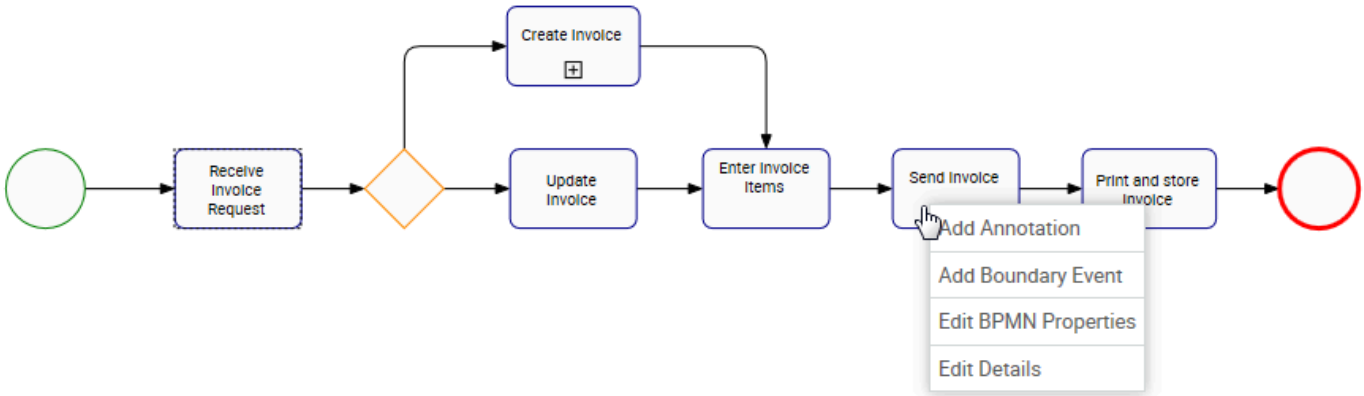
1. Navigate to Full Screen Edit Mode, after clicking on Edit Button



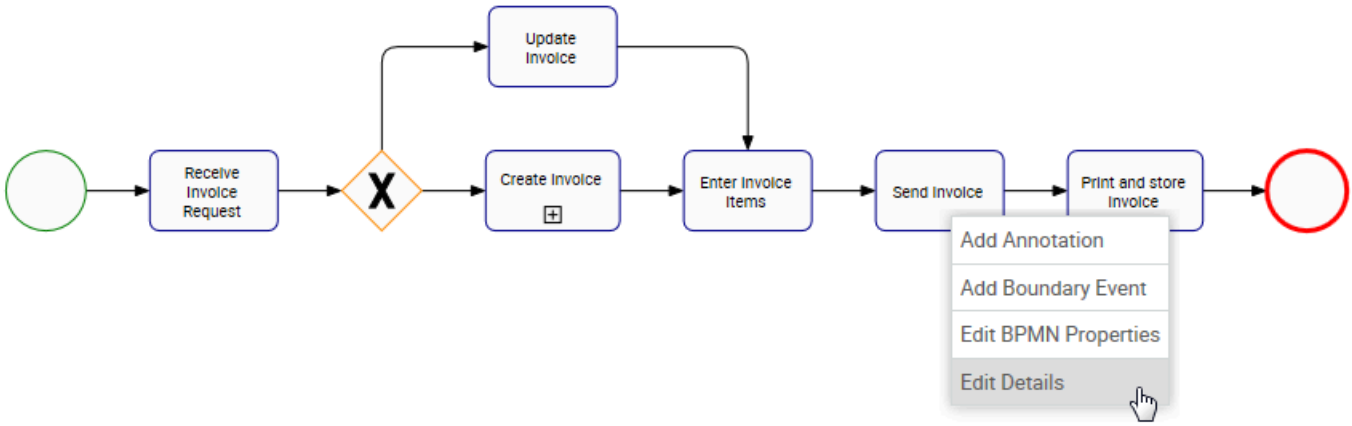
2. Navigate to a shape. In this example, to a task.



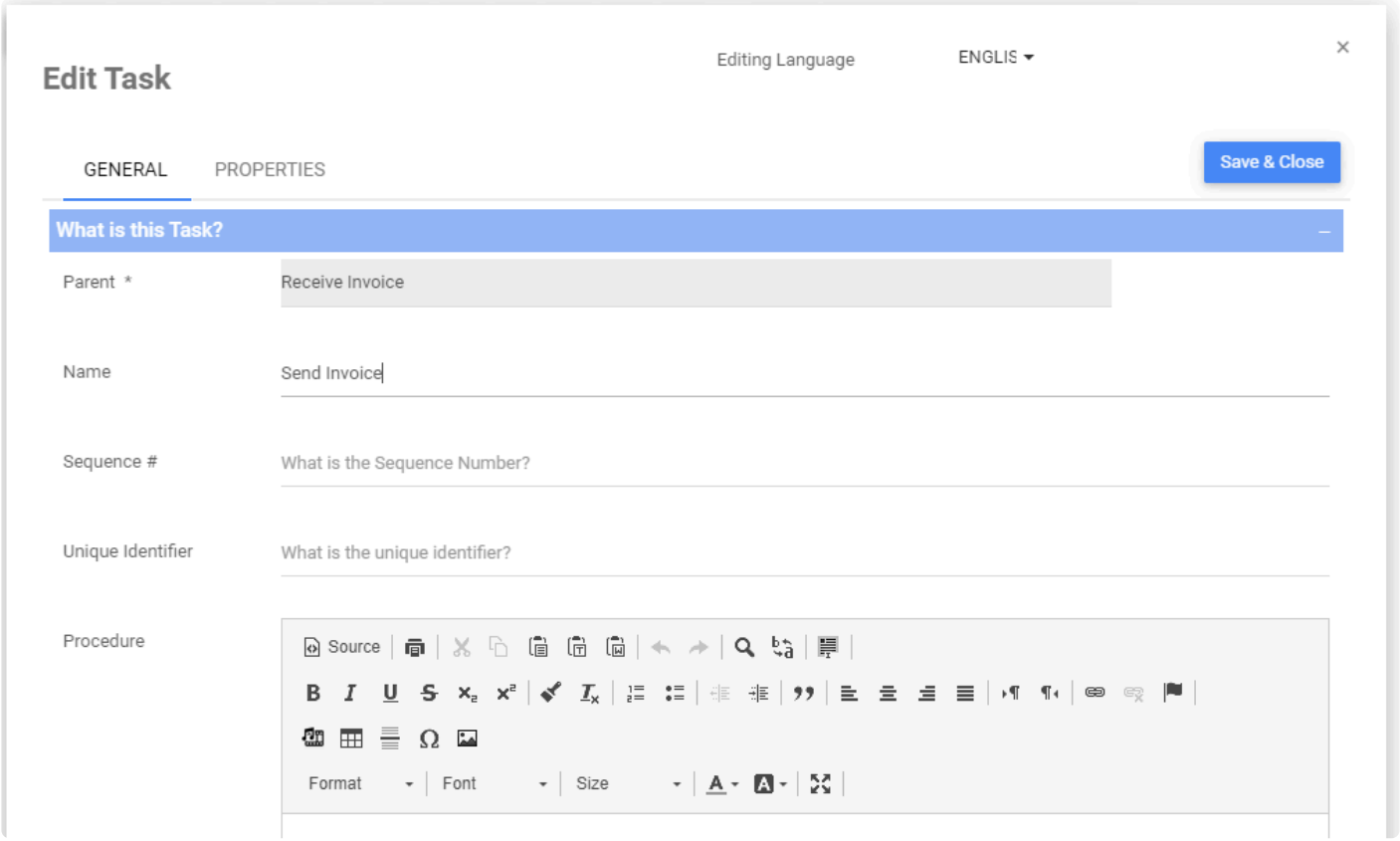
3. Right-click on the Task shape. A drop-down menu will be generate



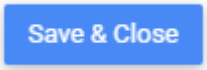
4. Choose the “Edit Details” box

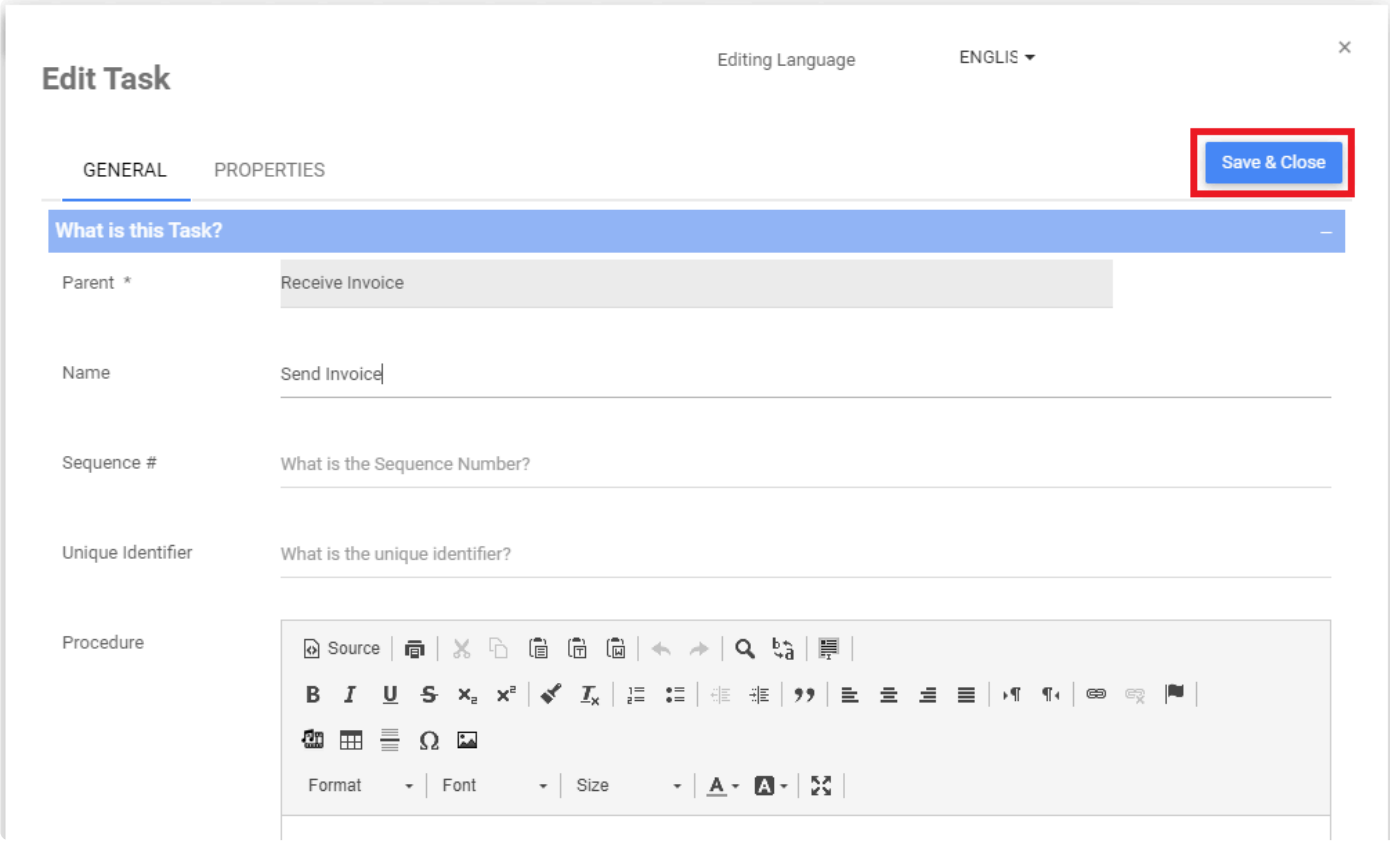


5. The Edit Task Window will be generated. You will receive a notification saying all changes made in the map were saved to a new version.

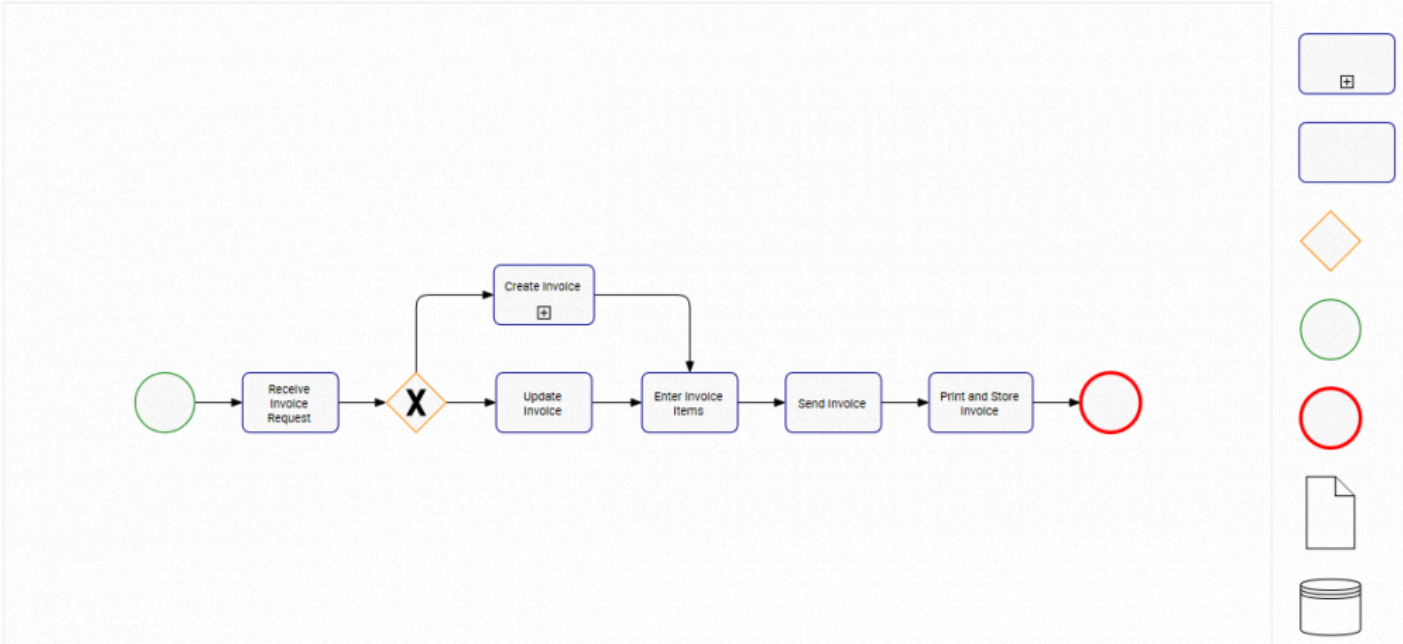


Refer to the “Edit Process Objects” to edit the sections within the General and Properties tab

6. After inputting the information about the Task, click on 



7. You will be redirected to the Full Screen Edit Mode



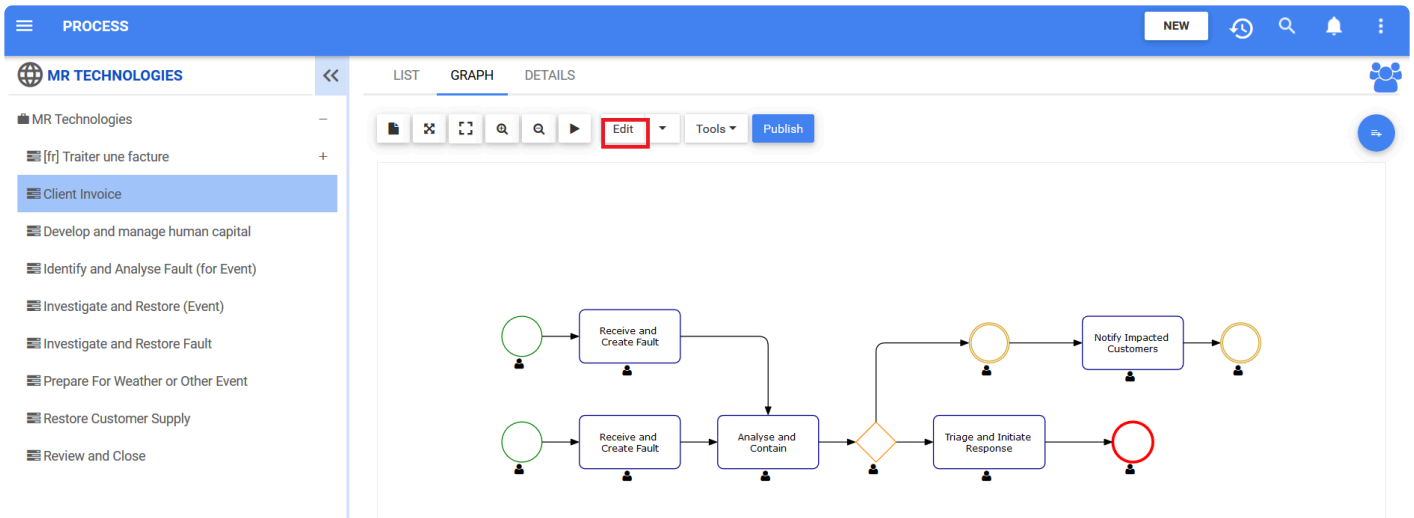
12.2.2.7.2 Edit Process Details

Web Modelers can edit the Details of a process while mapping the process in Graph Edit Mode.

To Edit the Details of a Process, please follow the instructions.

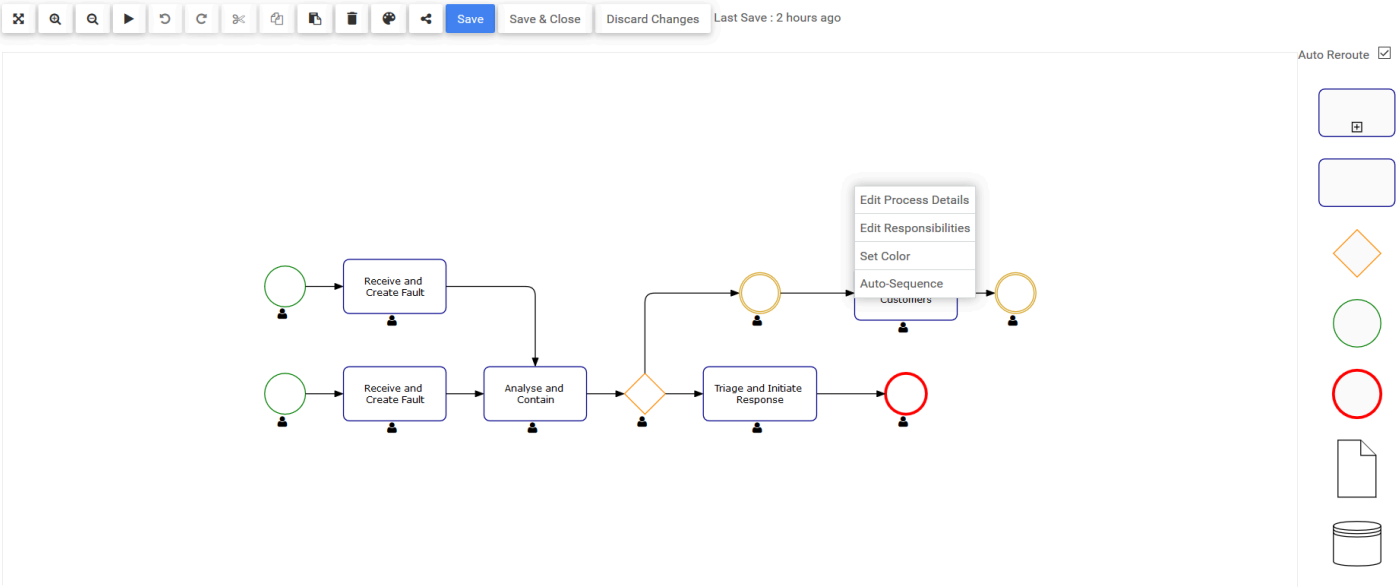
> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

1. Navigate to Full Screen Edit Mode, after clicking on Edit Button

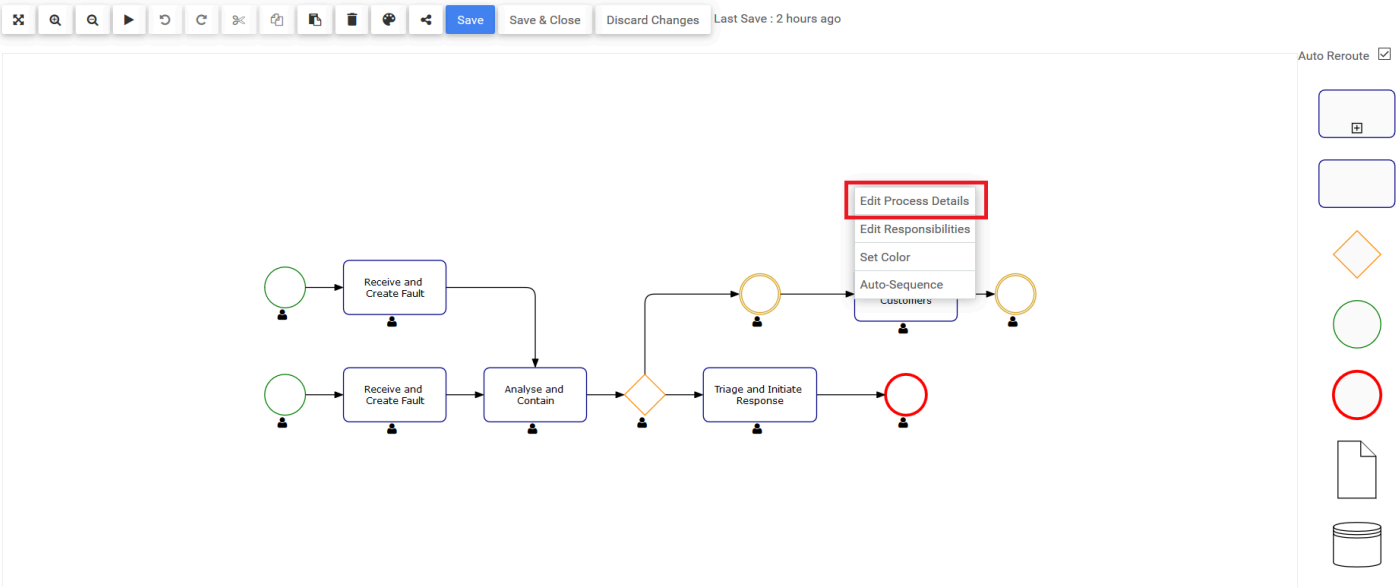


2. Right-click anywhere in the screen. A drop-down menu will be generate

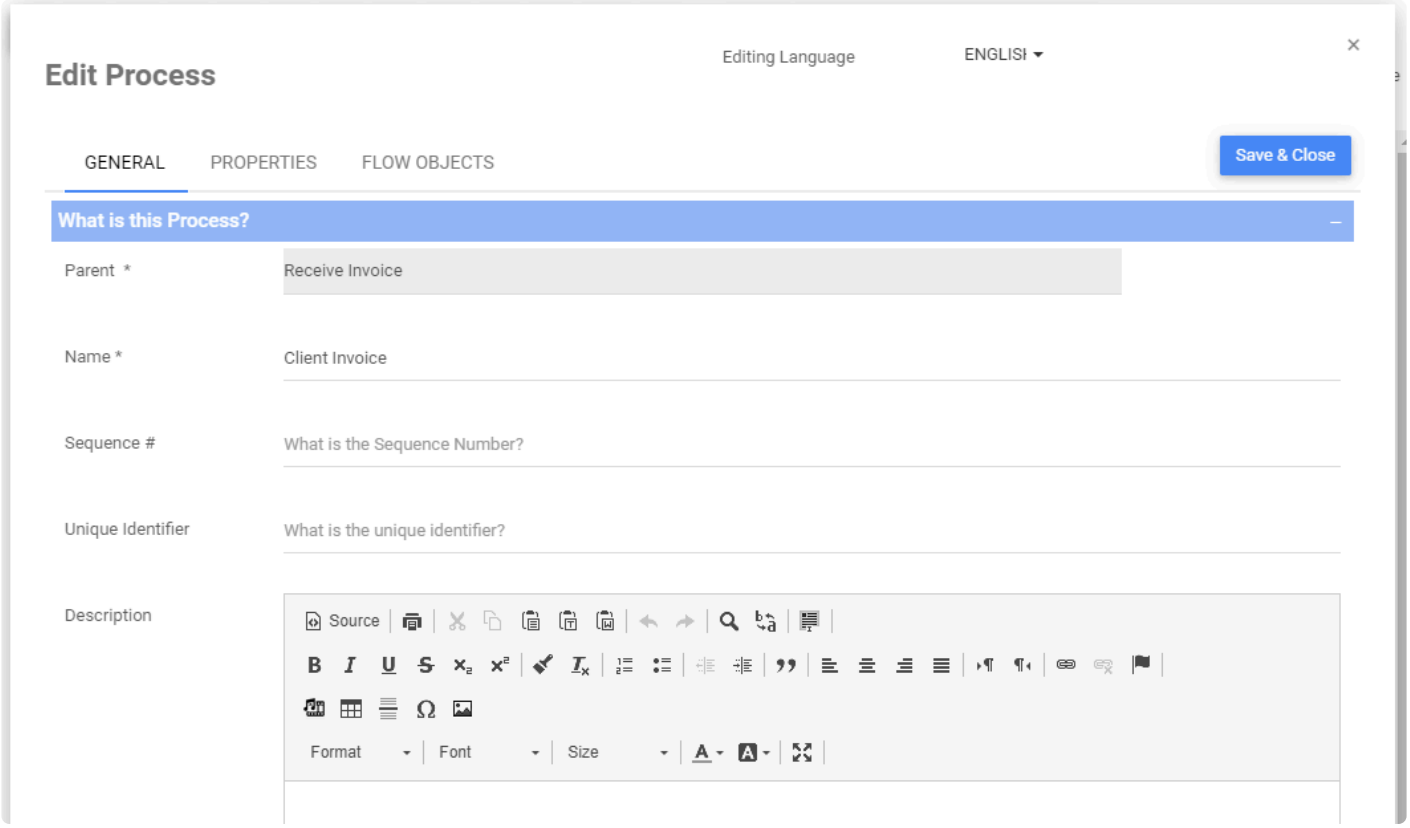
> To access the “Edit Process Details” window, Web Modelers can right-click anywhere in the screen where **there is not any shape**



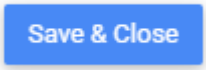
3. Choose the “Edit Process Details” box

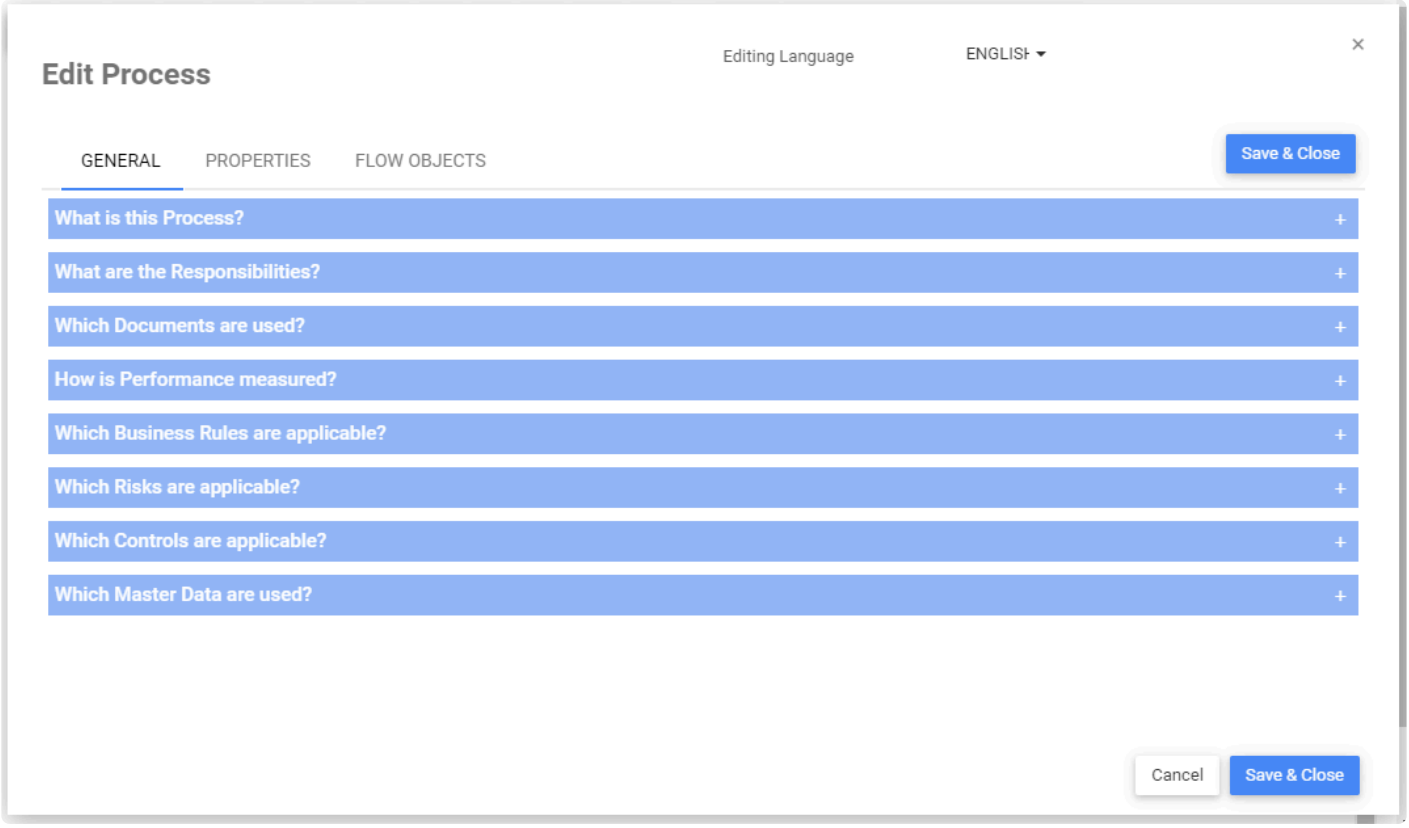


4. The Edit Process Window will be generated. You will receive a notification saying all changes made in the map were saved to a new version.

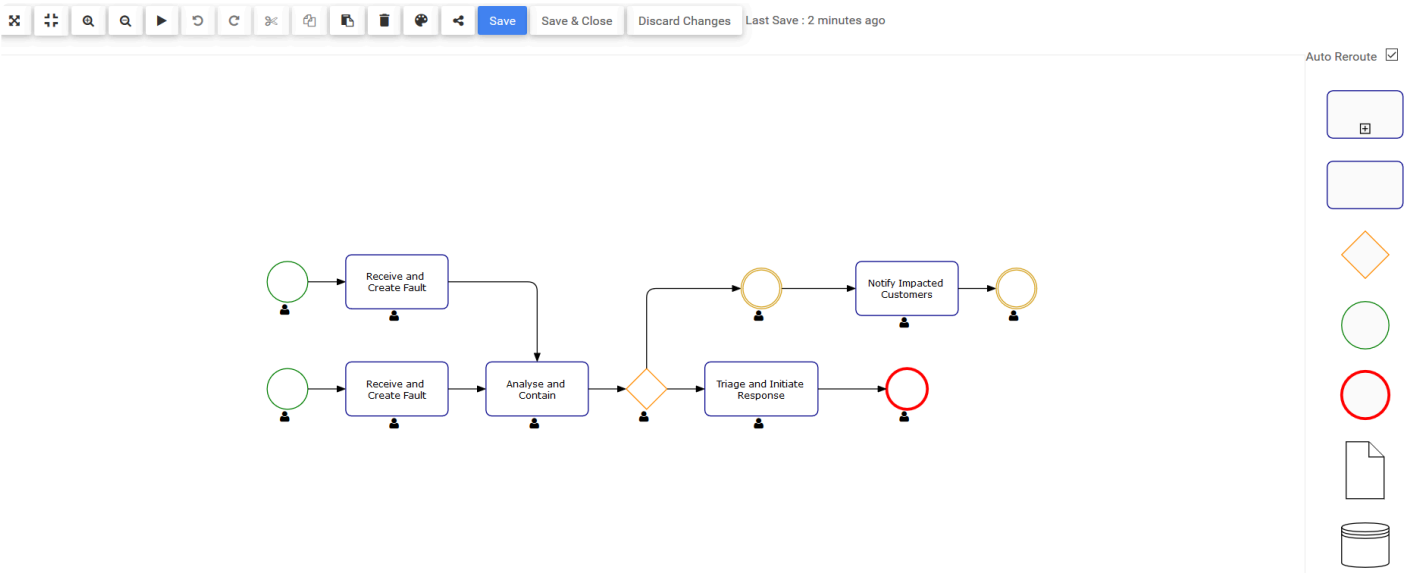


Refer to the "Edit Process Objects" to edit the sections within the General and Properties tab

5. After inputting the information about the Process, click on 



6. You will be redirected to the Full Screen Edit Mode



12.2.2.8 Inputs and Outputs

Inputs and Outputs define the flow of work between the shapes within a process. They represent the inputs required to start an activity and the outputs produced once the activity is completed.

Web Modelers can assign Inputs and Outputs to the flows of a process map when mapping processes on Graph Edit Mode.

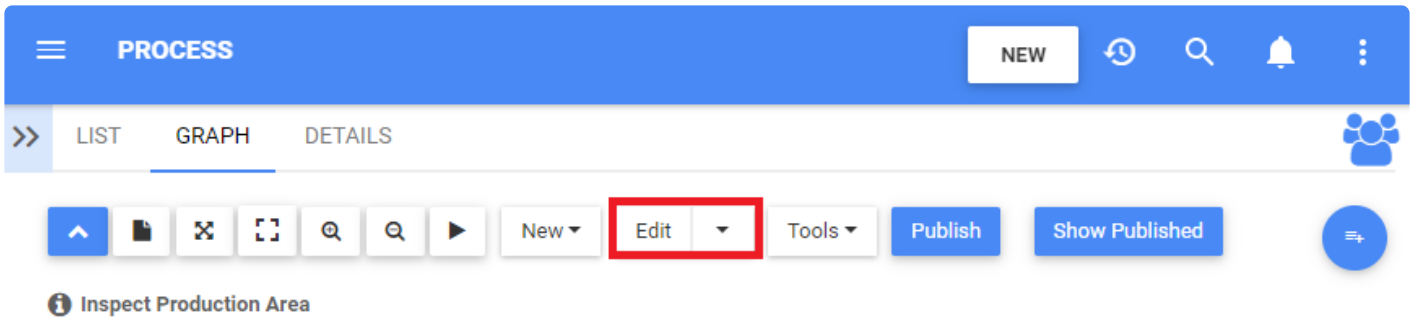
The end-user will be able to see the inputs and outputs directly when viewing the process map under the Graph tab, and under the SIPOC section in the Details tab of a Process.

The following table will explain the SIPOC concept:

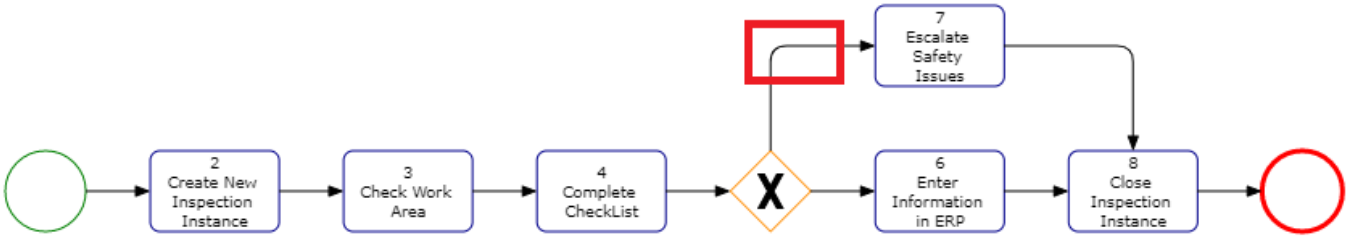
Name	Description	Example
Supplier	Entity that provides input(s) to a process	Client, call center, email
Inputs	All that is used to produce one or more outputs from a process	Calls, order, invoice
Processes	Steps or activities carried out to convert inputs to one or more outputs	Verify customer's identity, calculate invoice, fill order form
Outputs	Users can view the outputs emerging from a process	Resolution of customer issue, invoice sent, order completed
Customers	Users can view the entity that uses the outputs generated from the process	End customer, client, organization

1. Instructions to Assign Inputs and Outputs to a flow on the fly

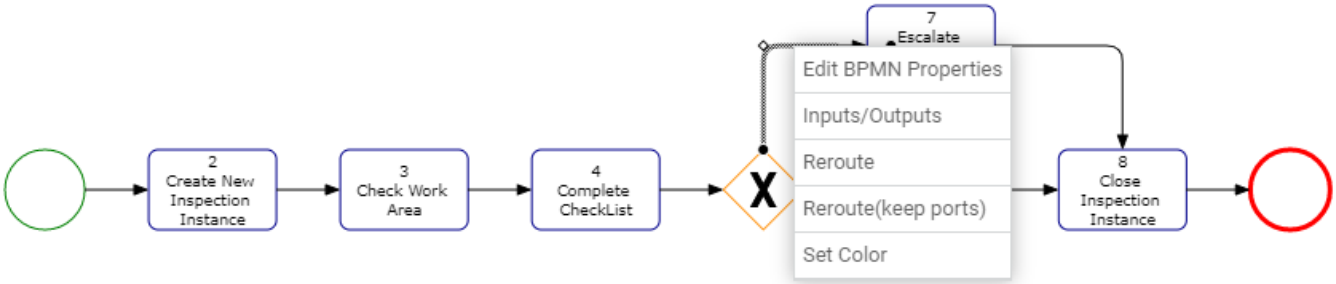
1. Navigate to Full Screen Edit Mode, after clicking on Edit Button



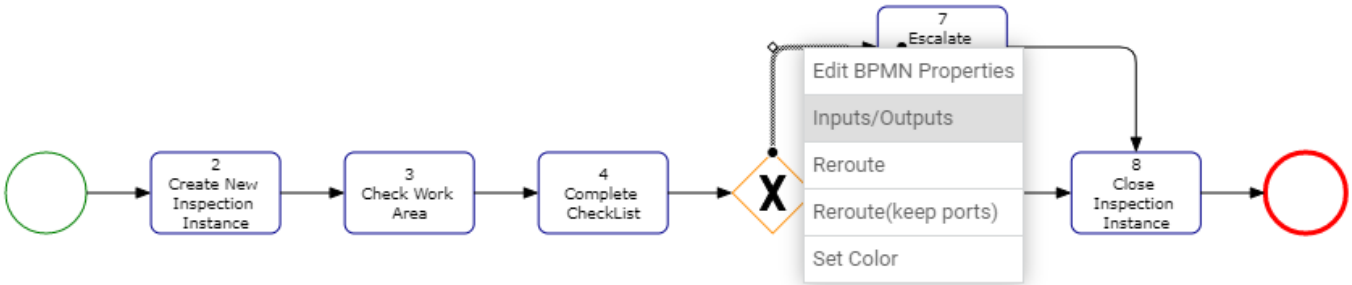
2. Navigate to a Flow



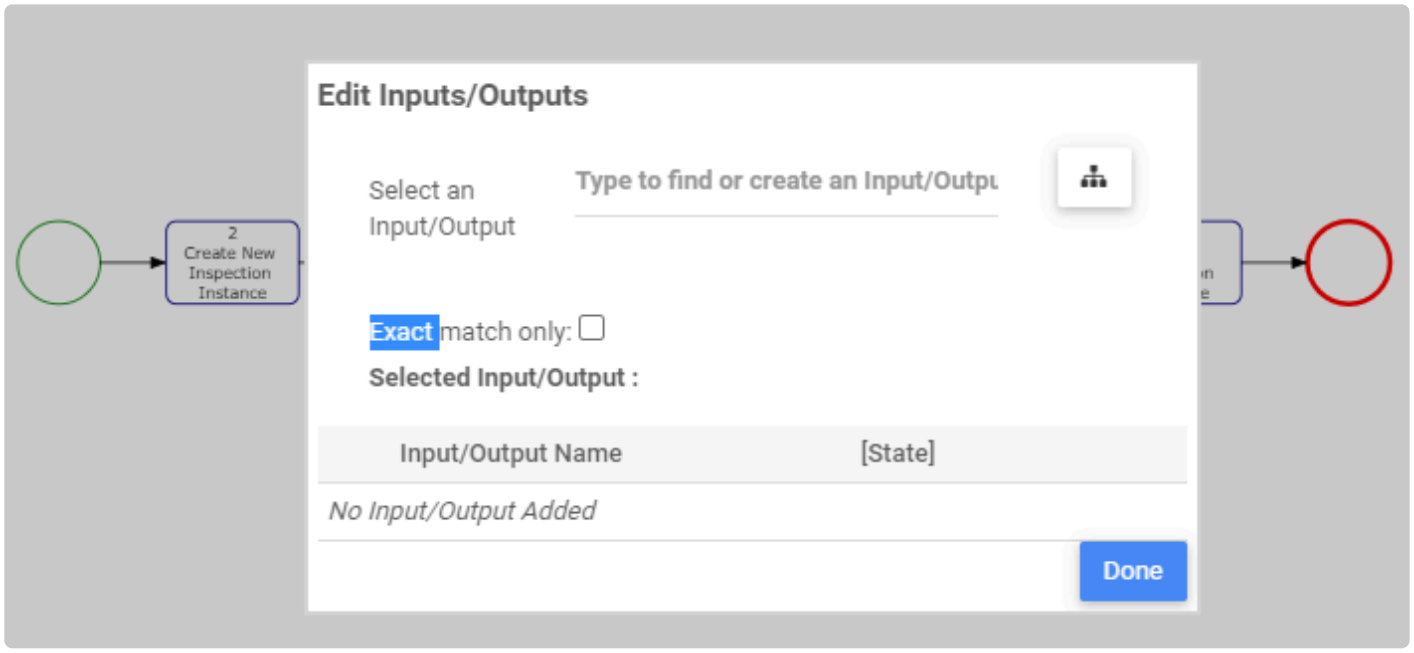
3. Right-click on the Flow. A drop-down menu will be generated



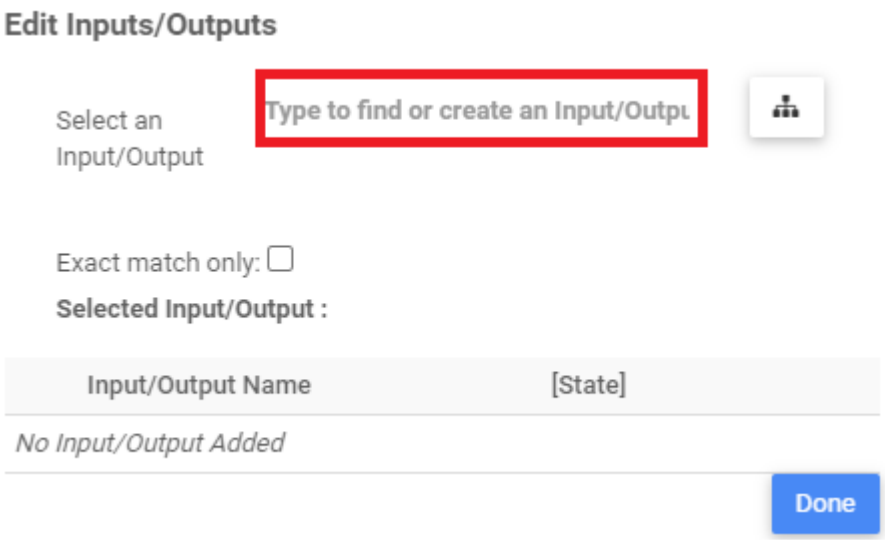
4. Choose the “Inputs/Outputs” box



5. A pop-up will be generated allowing you to edit the Inputs and Outputs for the Flow



6. Navigate to the “Select an Input/Output” field

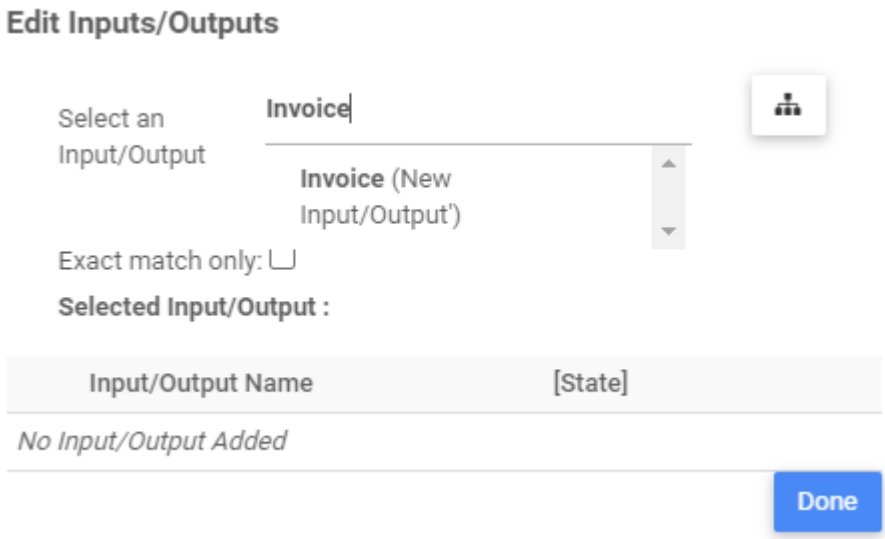


7. Type the name of the Input/Output

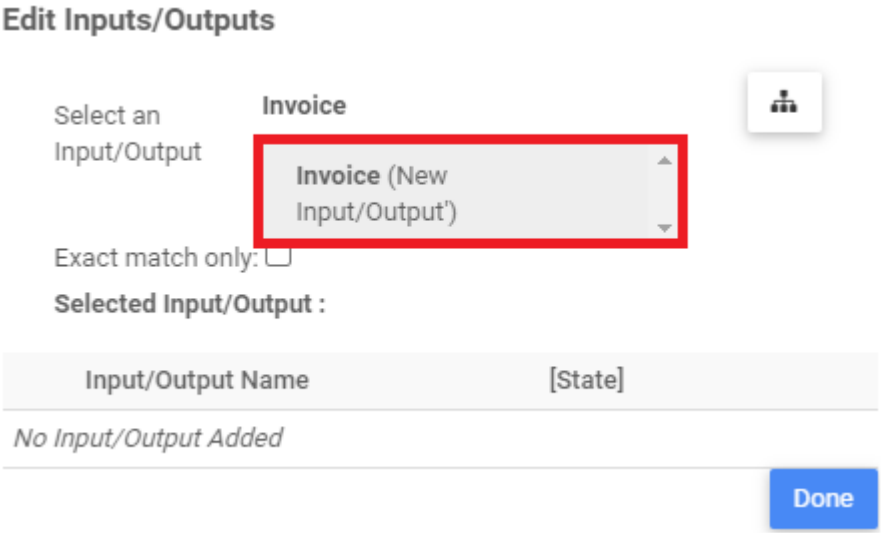
> The list of suggestions will populate based on key word typing

<u>New Input/Output</u>

i) Type the name of the **new** material

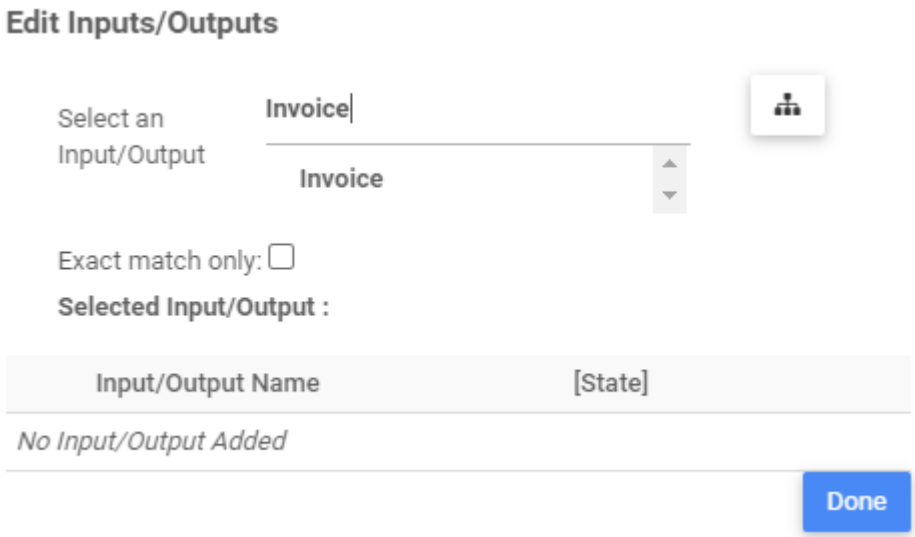


ii) Select the **new** material

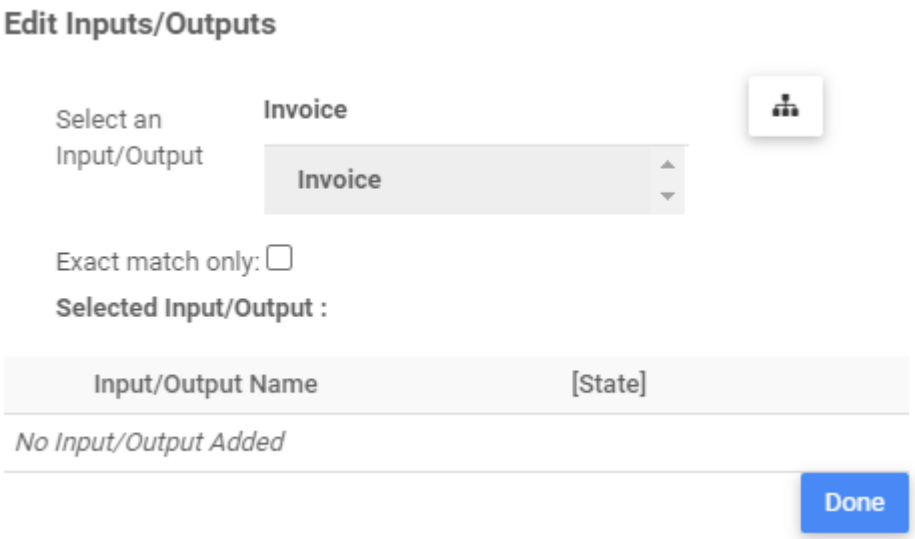


<u>Existing Input/Output</u>

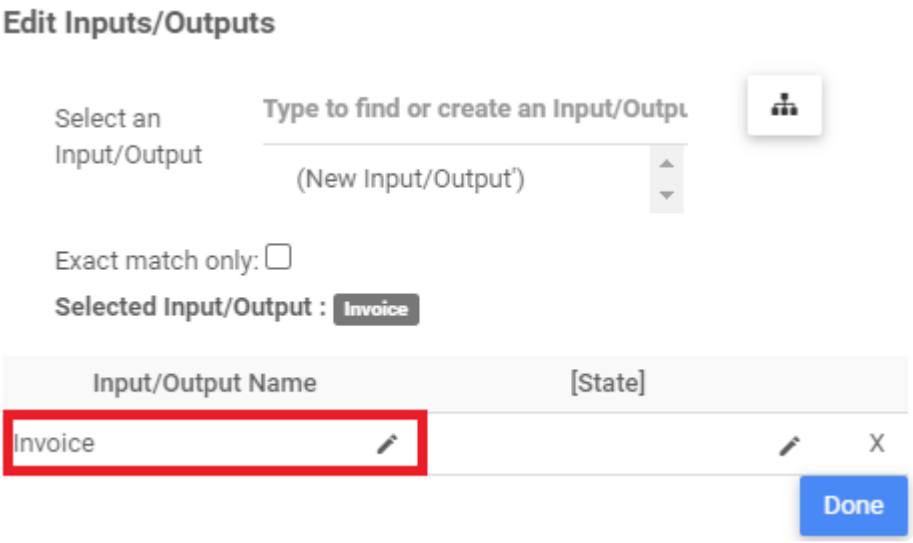
i) Type the name of the **existing** material



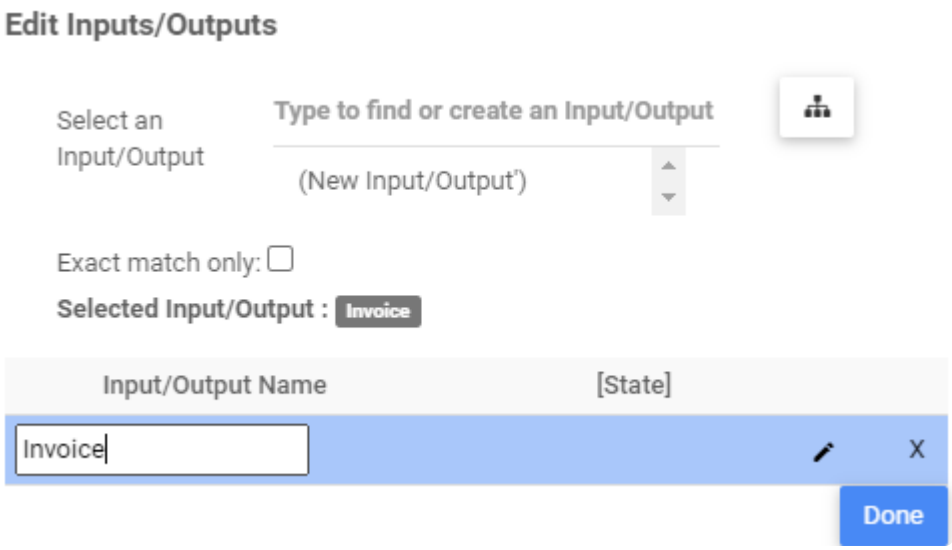
ii) Select the **exiting** material



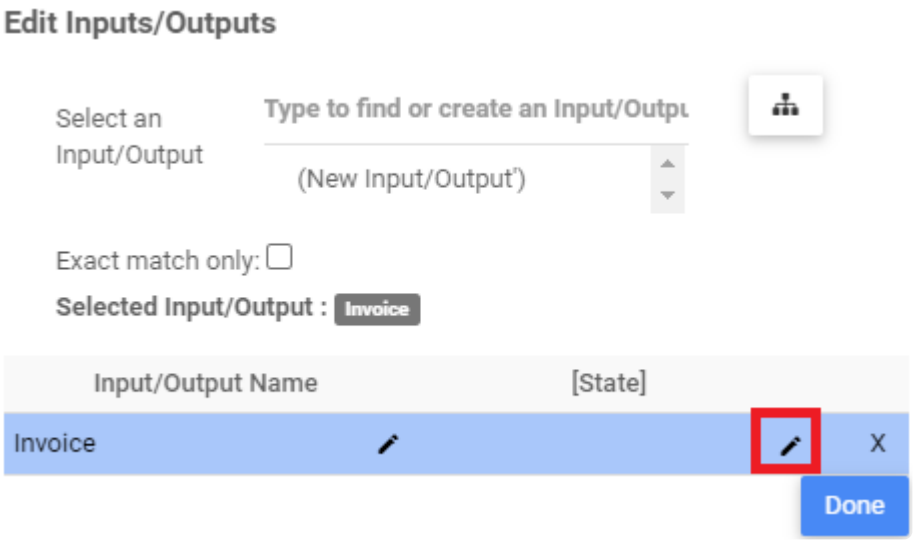
8. The Input/Output, “Invoice,” will be on the table



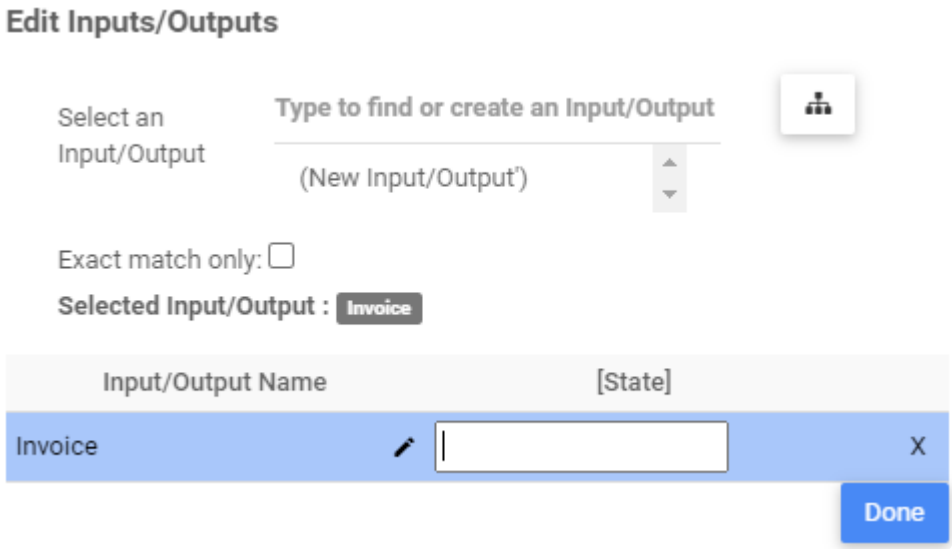
9. Navigate to the icon to edit the name of the Input/Output



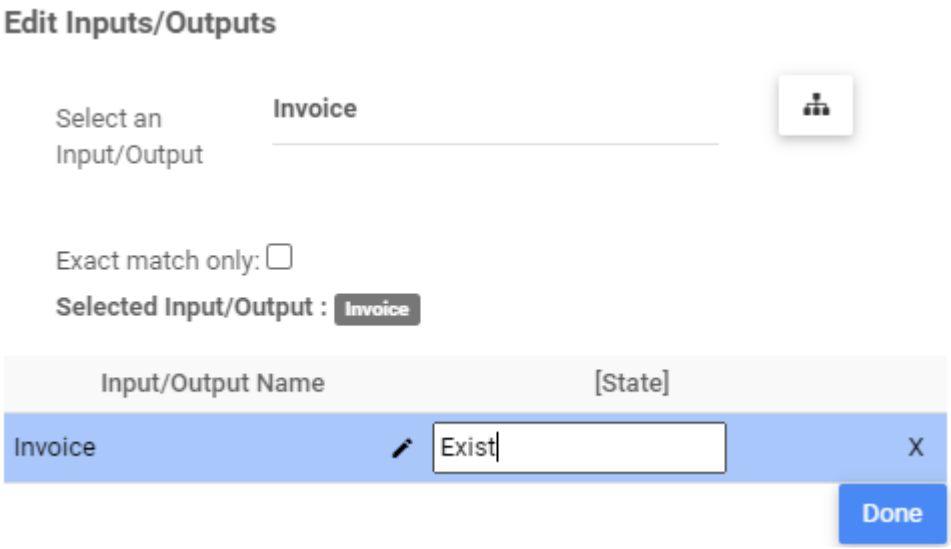
10. Edit the name of the Input/Output



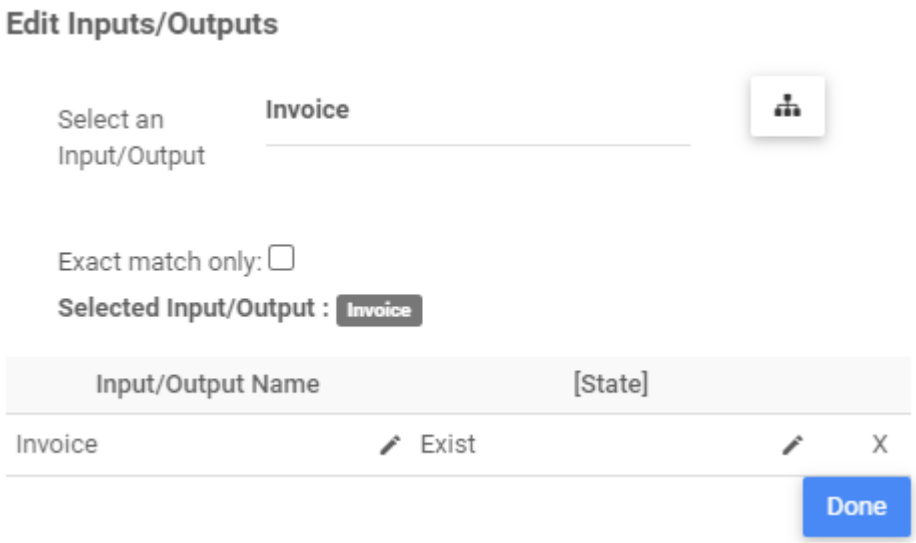
11. Navigate to the icon to edit the state of the Input/Output



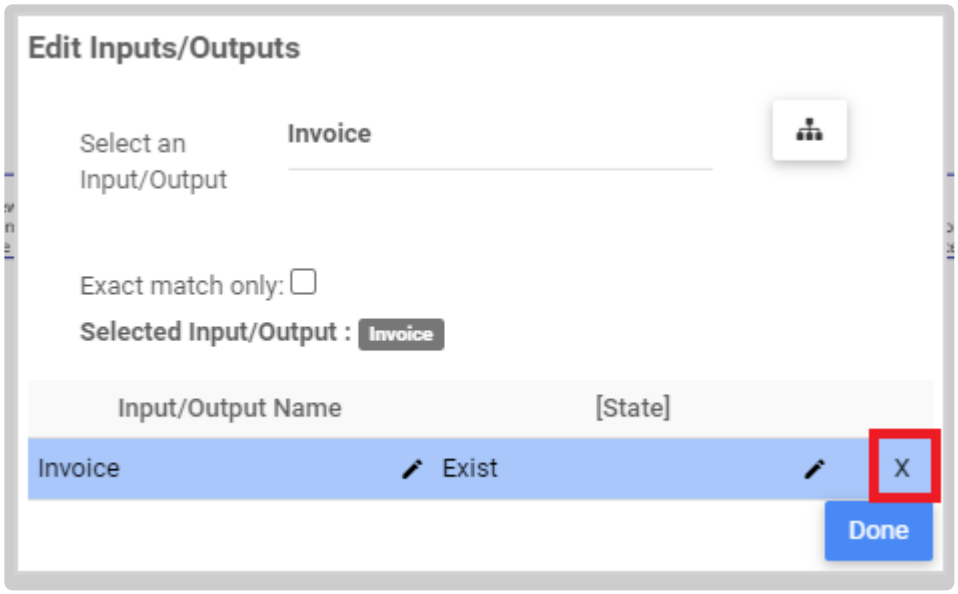
12. Type the state of the Input/Output



In this example, the state of the “Invoice” is “Exists”

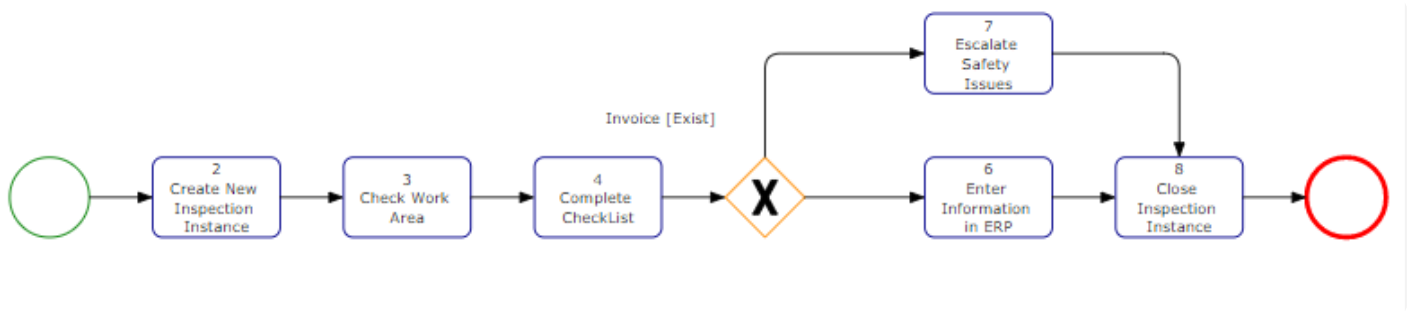


13. Click on the “X” to remove the Input/Output



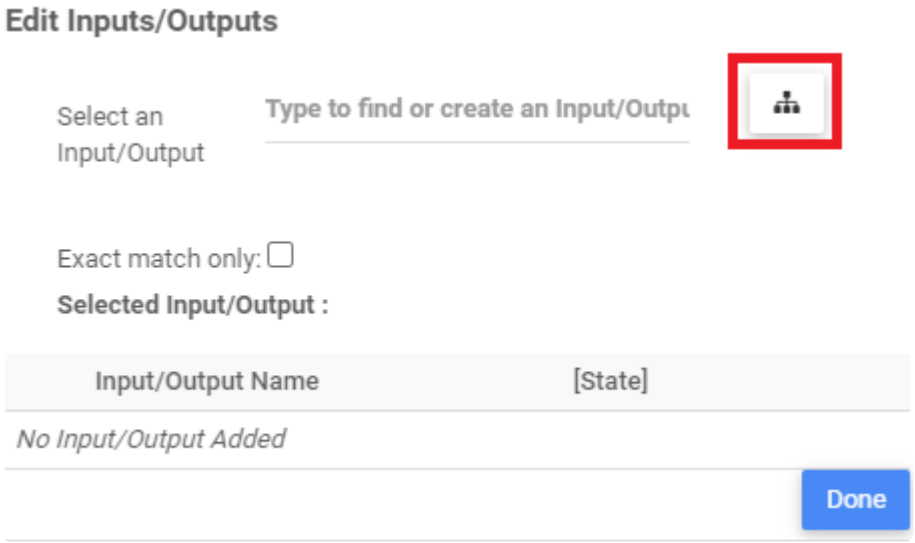
14. After assigning the Input/Output to the Flow, click on the Done box to close the pop-up

15. The Input/Output will now be displayed on the Flow on the process map inside of an annotation



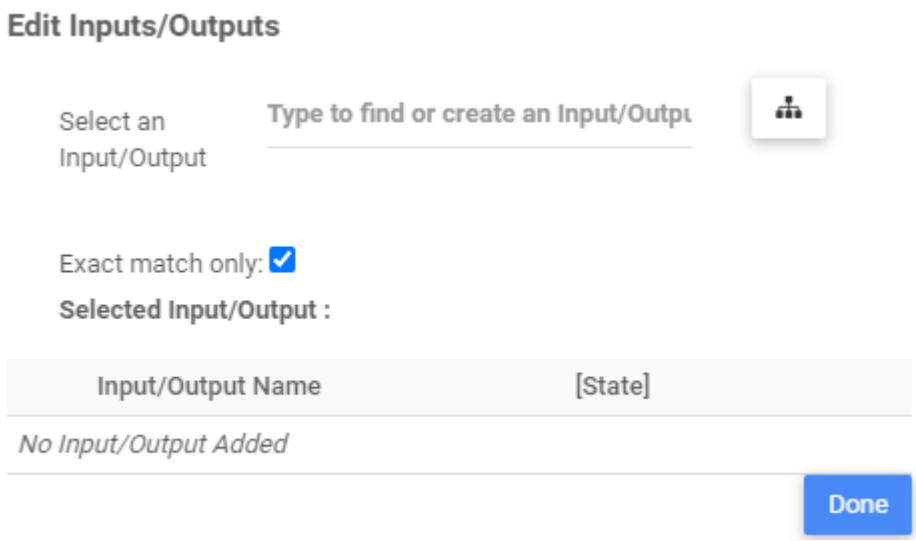
2. Tree selector

Assigning Inputs and Outputs to a flow, Creating, Deleting and Merging new Inputs/Outputs can be done through the tree selector. It also regroups all the Inputs/Outputs created on the fly like shown previously under the Unclassified folder.



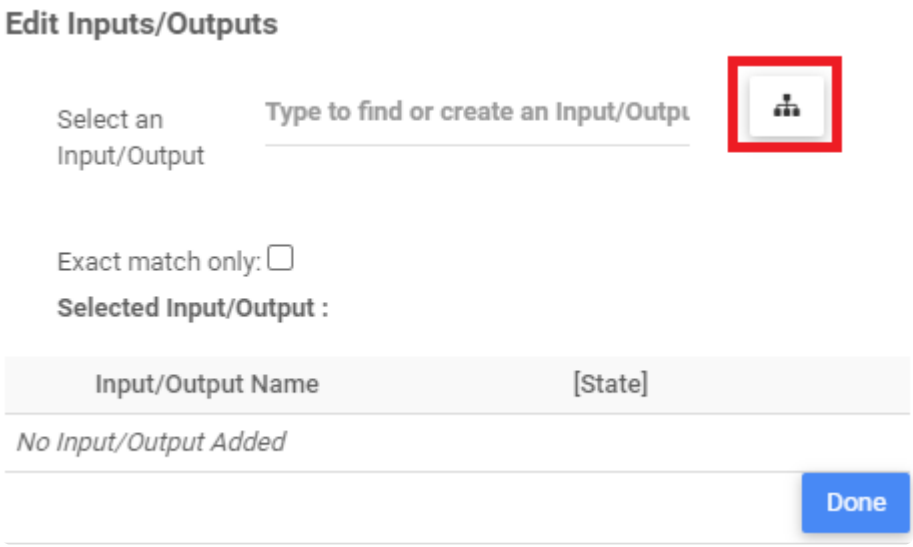
Exact Search Result

Users can leverage the search function to easily find items within the Web App. The search function, allows users to search through all uploaded items to which they have access to. User can either limit the suggested results by turning on the “Exact match only” checkbox to search for a specific item or key word or tuning it off to search partial results.

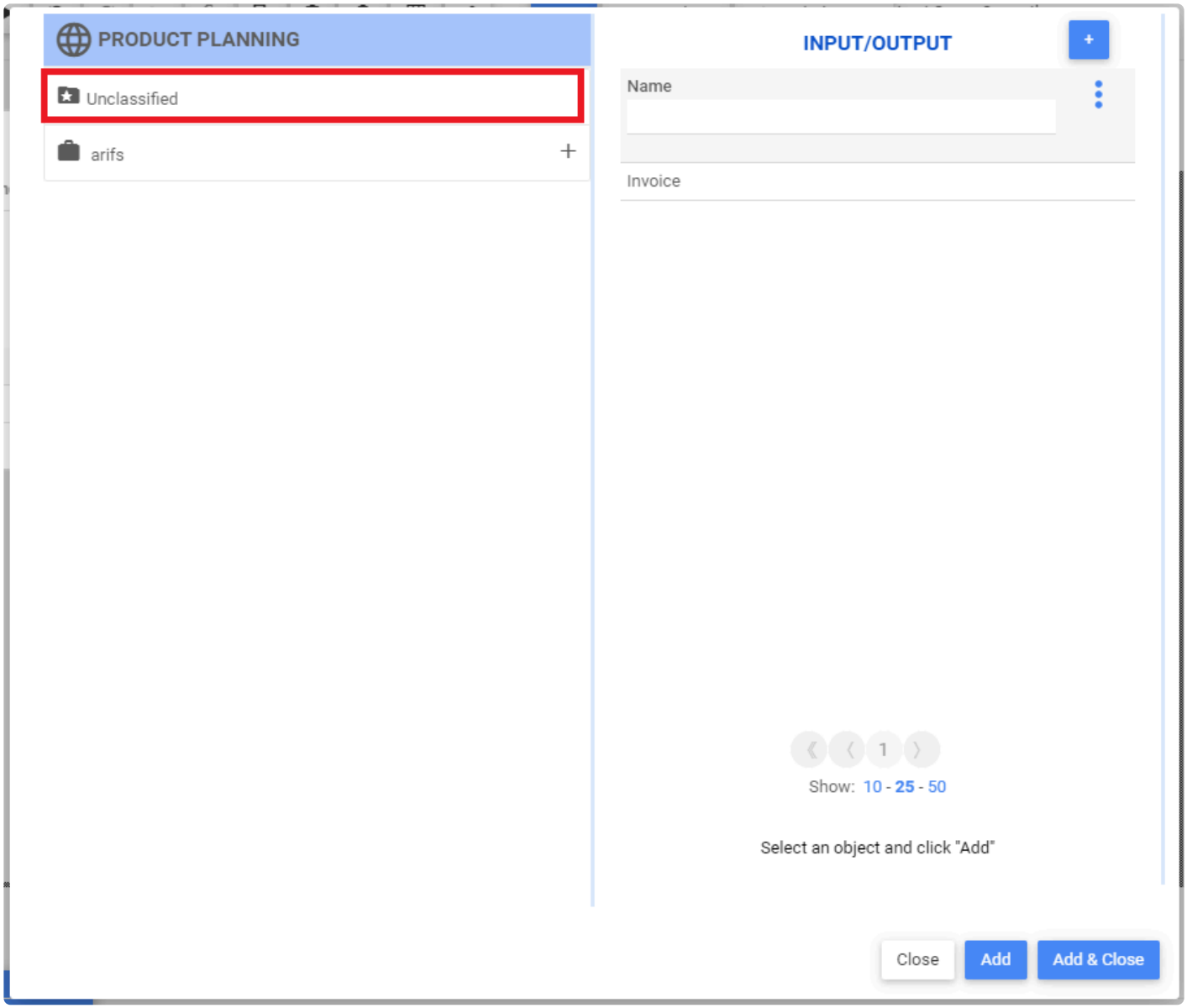


12.2.2.8.1 Tree selector – Unclassified Inputs and Outputs

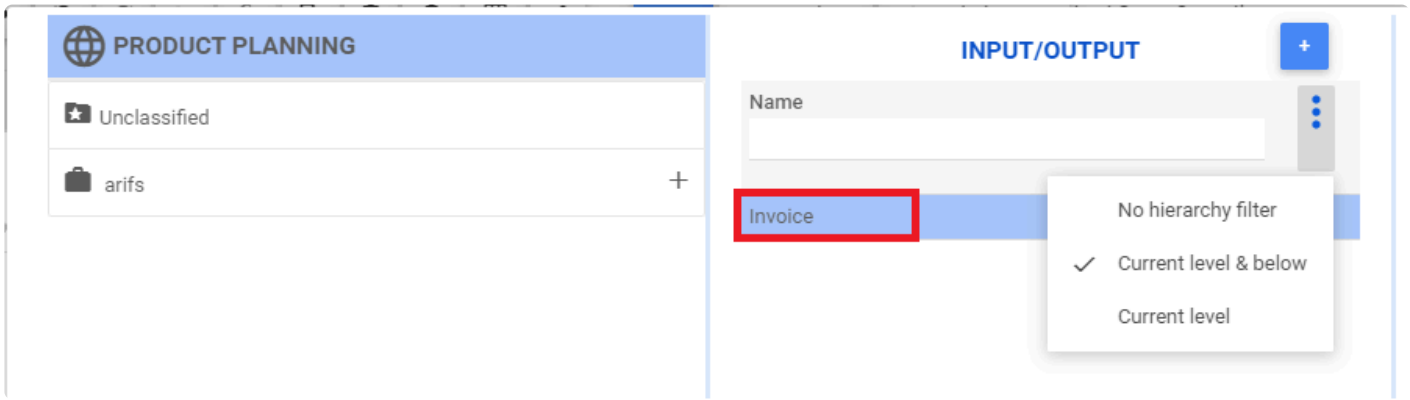
To reach the Unclassified folder, you need to access the tree selector window, by clicking on the following button. Steps to get there are detailed in Inputs and Outputs.



The Unclassified folder exists by default in the tree selector pop-up window. This “folder” allows the creation on the fly of inputs/outputs without having to reach the tree selector window.

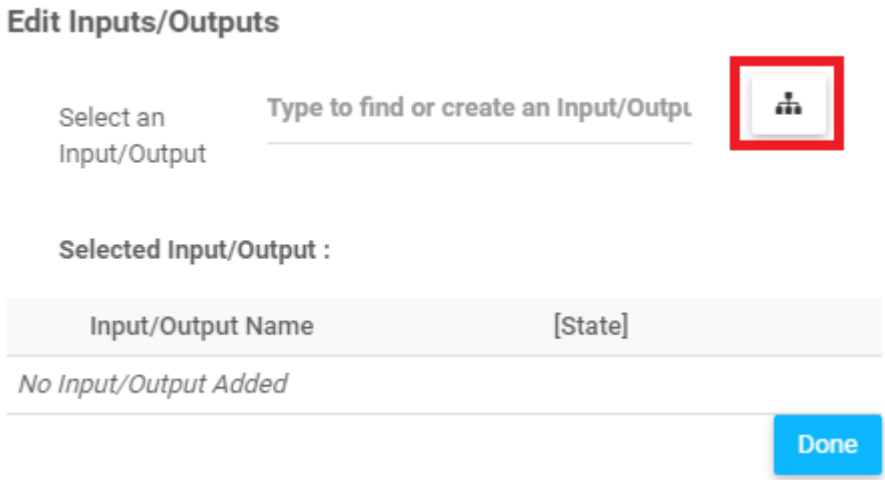


All inputs/outputs previously created will be displayed in the list section, as shown below. They can always be found quicker by having the list option set as “Current Level & Below”. It is also possible to filter the name of the input/output of interest.



12.2.2.8.2 Tree selector – Create Inputs and Ouputs

To reach the tree selector window, you need to click on the following button. Steps to get there are detailed in Inputs and Outputs.

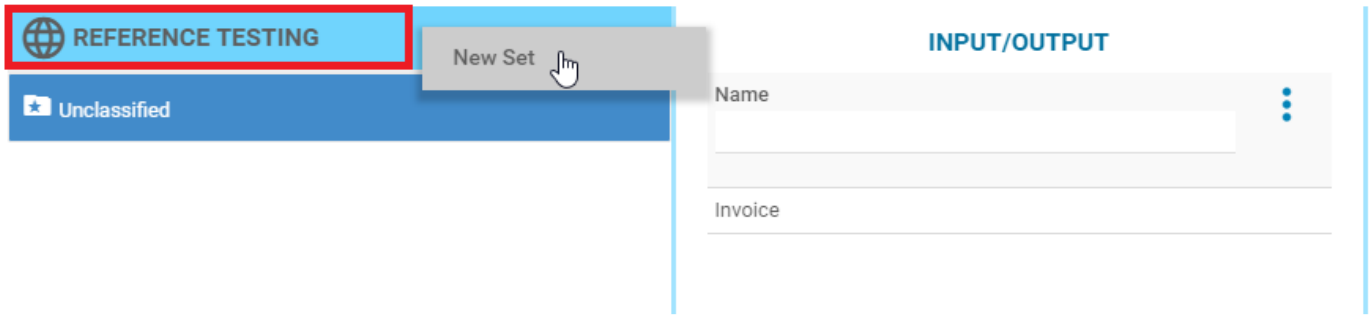


To create new content, **everything** is done through **right-clicking**, or by using the + button.

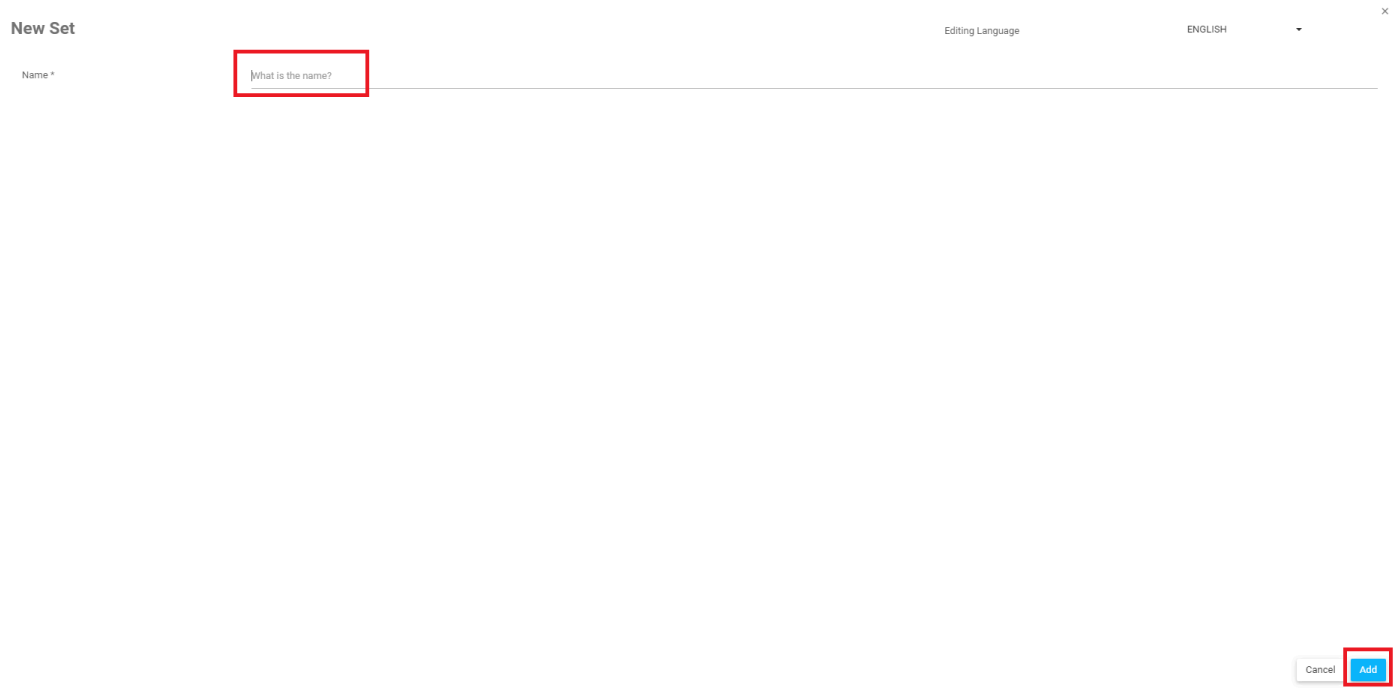
Instructions to create content

> These steps only have to be followed in order for the first time content is created. Once there is existing content, the right-clicking can be done from any object.

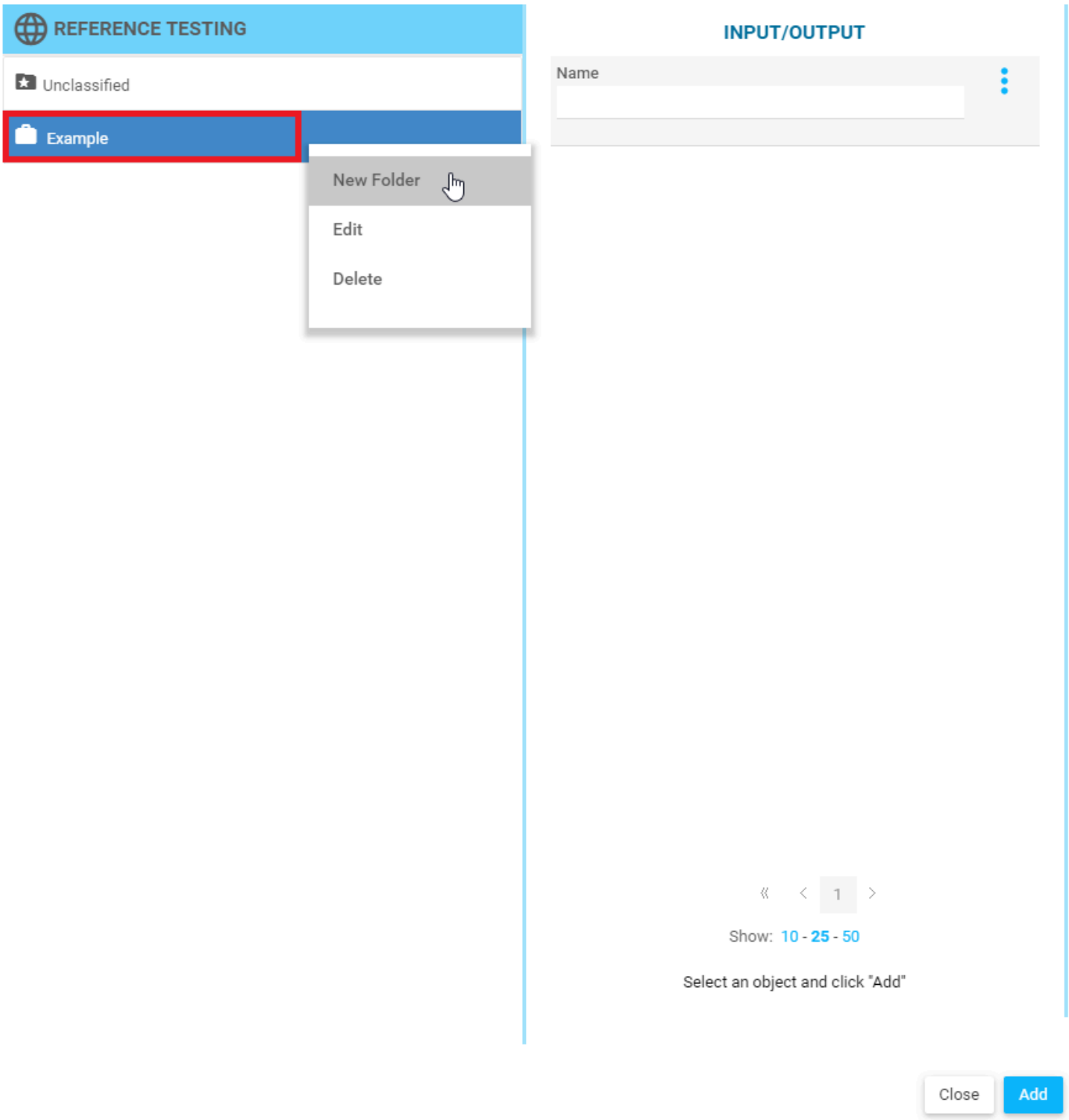
1. Right-click on the “Reference Testing” header and click on the “New Set” option.



2. Enter the name of the “New Set” and click on the **Add** button.

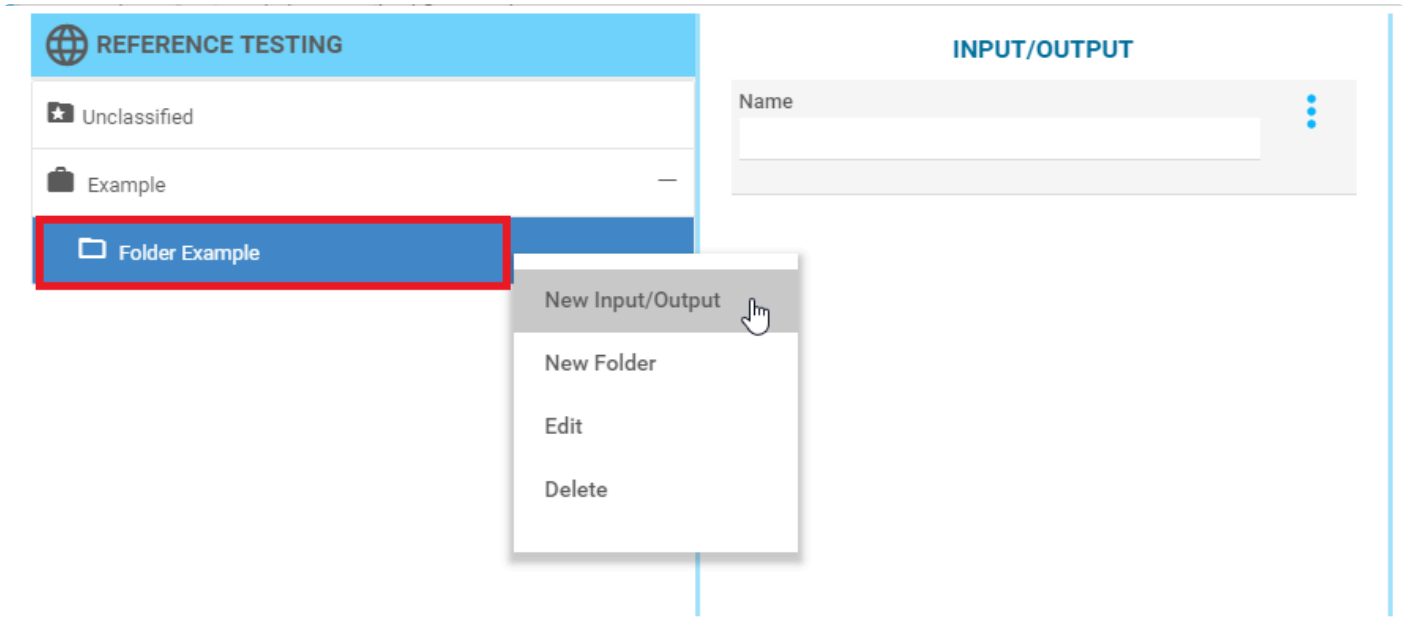


3. Right-click on the set and click on “New Folder” option.

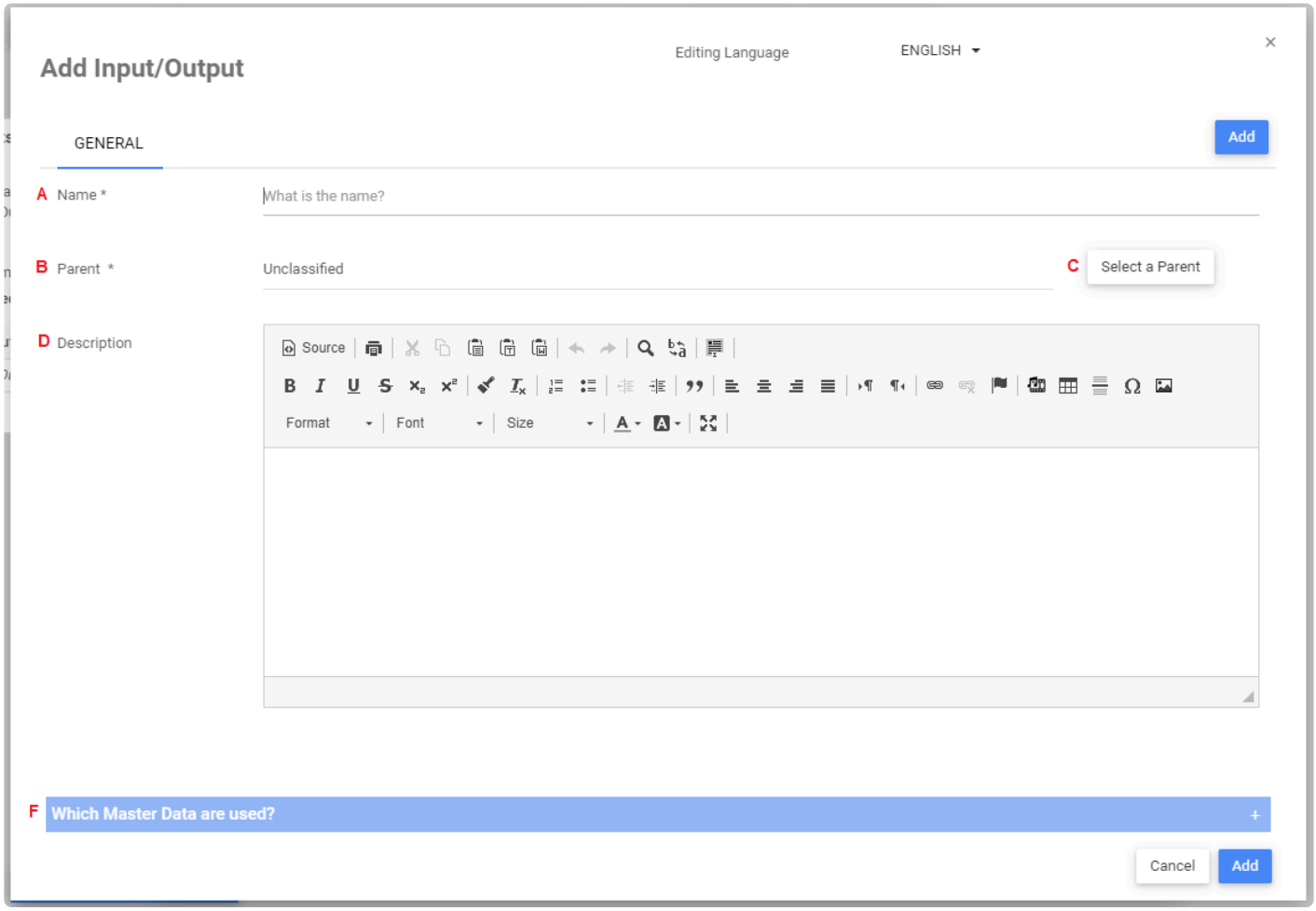


4. The same way you did for the set, you can enter the name of the “New Folder” and click on the **Add** button.

5. Right-click on the folder and click on “New Input/Output”.



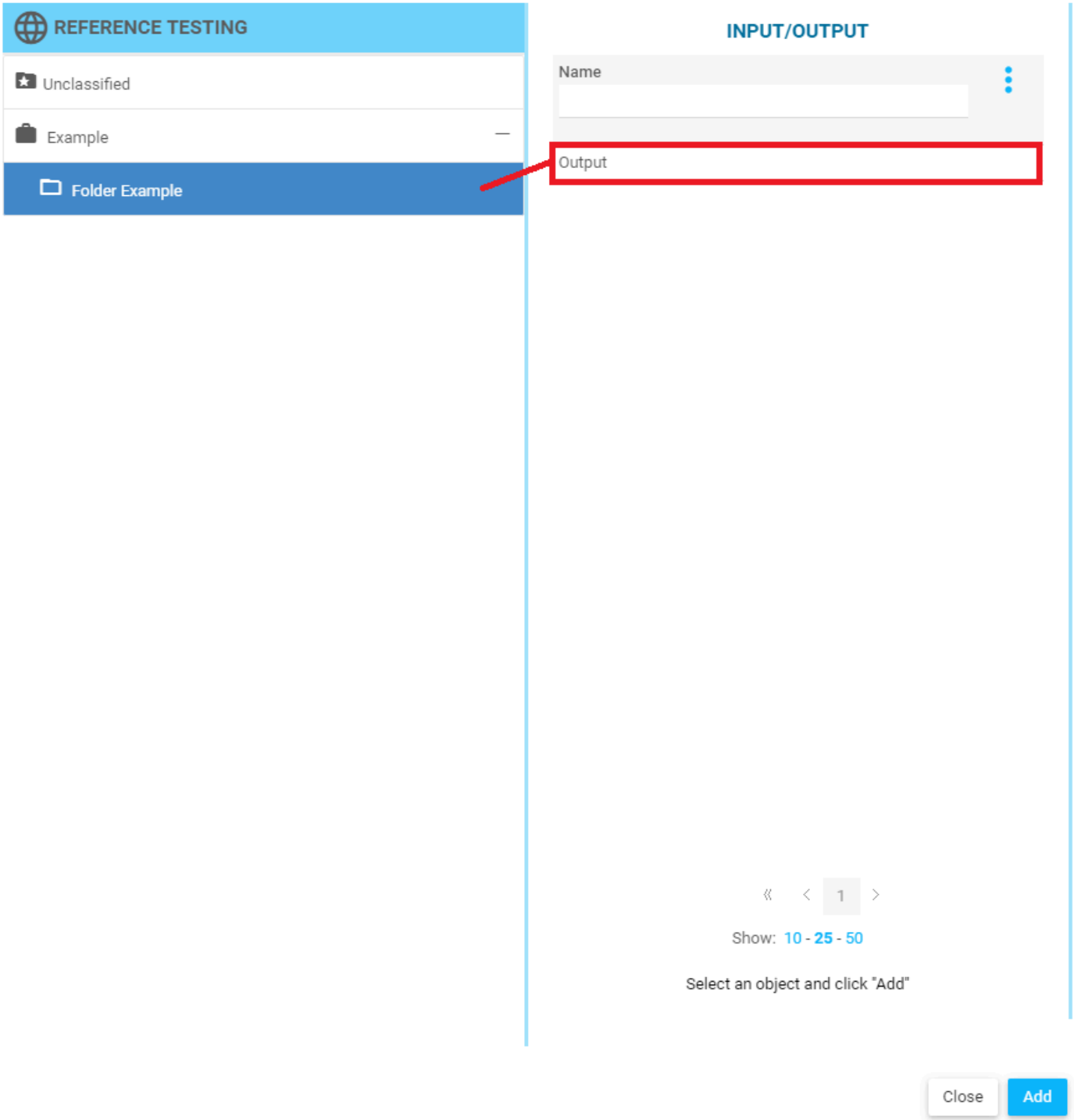
6. You can view and change different options in the page that opens:



A	The name of the input/output

B	Display of the selected folder, that will become the parent of the input/output
C	The option to select another available parent
D	The description of the input/output
E	The association to Master Data

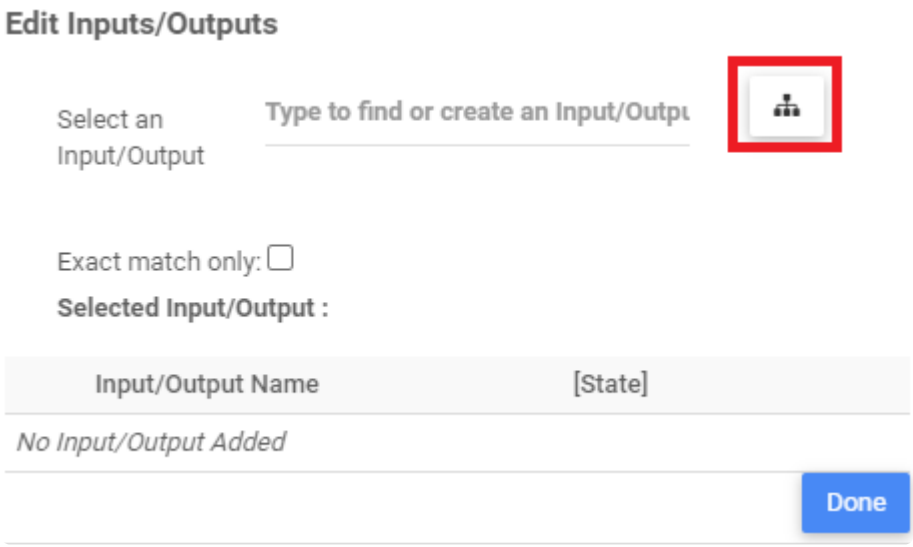
7. Once the input/output is created, it will be found in the list, under the selected parent.



Once a set is created, the option to create folders will always be available under folders and sets. This allows the creation of a tree structure for the inputs/outputs.

12.2.2.8.3 Tree selector – Delete Inputs and Outputs

To reach the tree selector window, you need to click on the following button. Steps to get there are detailed in [Inputs and Outputs](#).

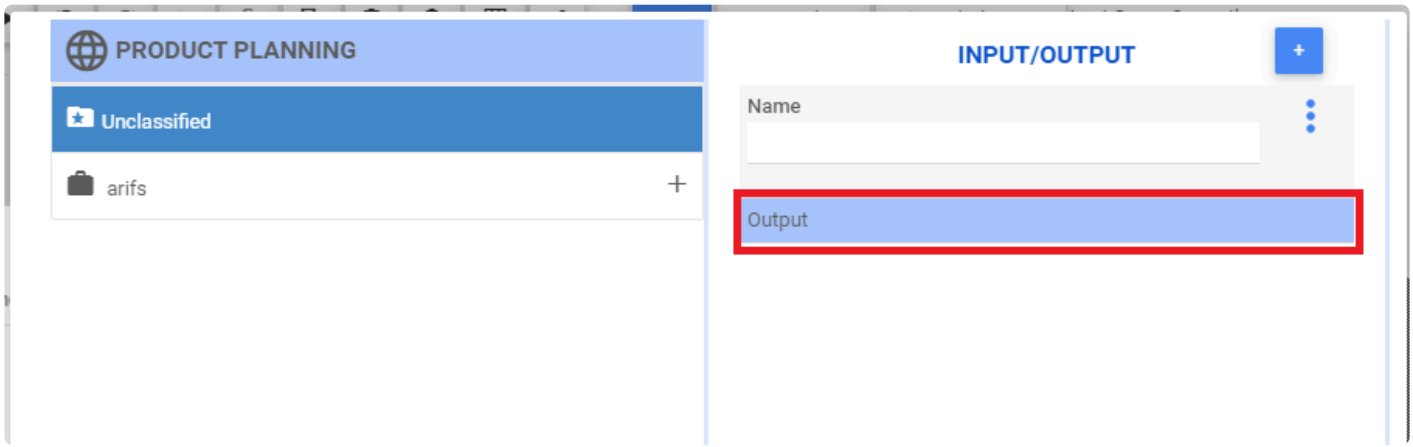


To delete content, **everything** is done through **right-clicking**.

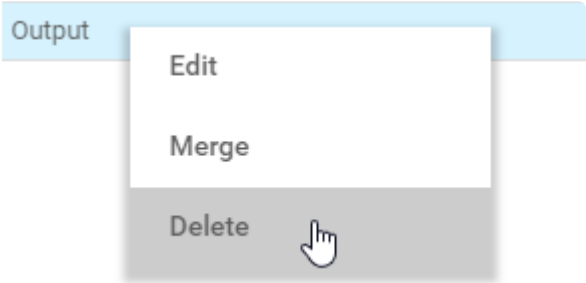
Instructions to delete content

> The delete action is available for every objects that exists in the tree. the only object that can't be deleted in the Unclassified folder, that is there by default.

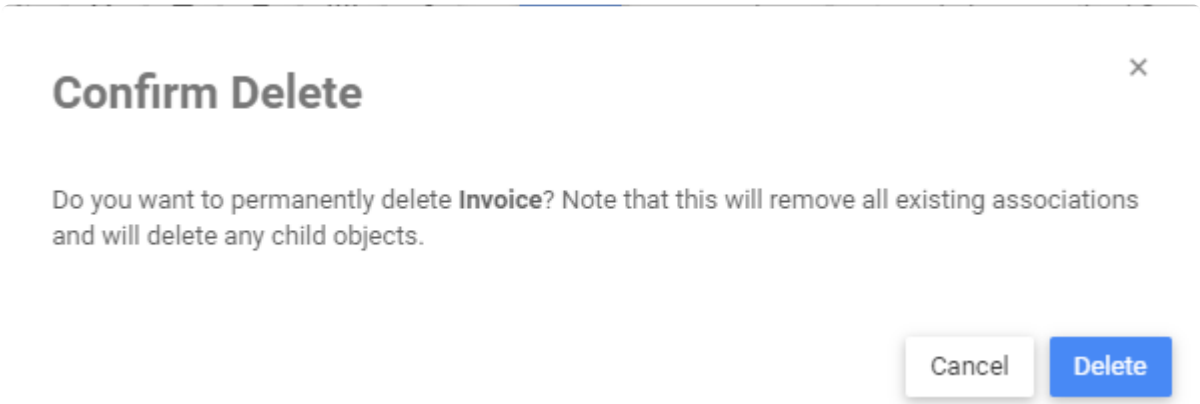
1. Right-click on the object of interest that you want to delete. The example will be done for an input/output, but it works the same way for folders and sets.



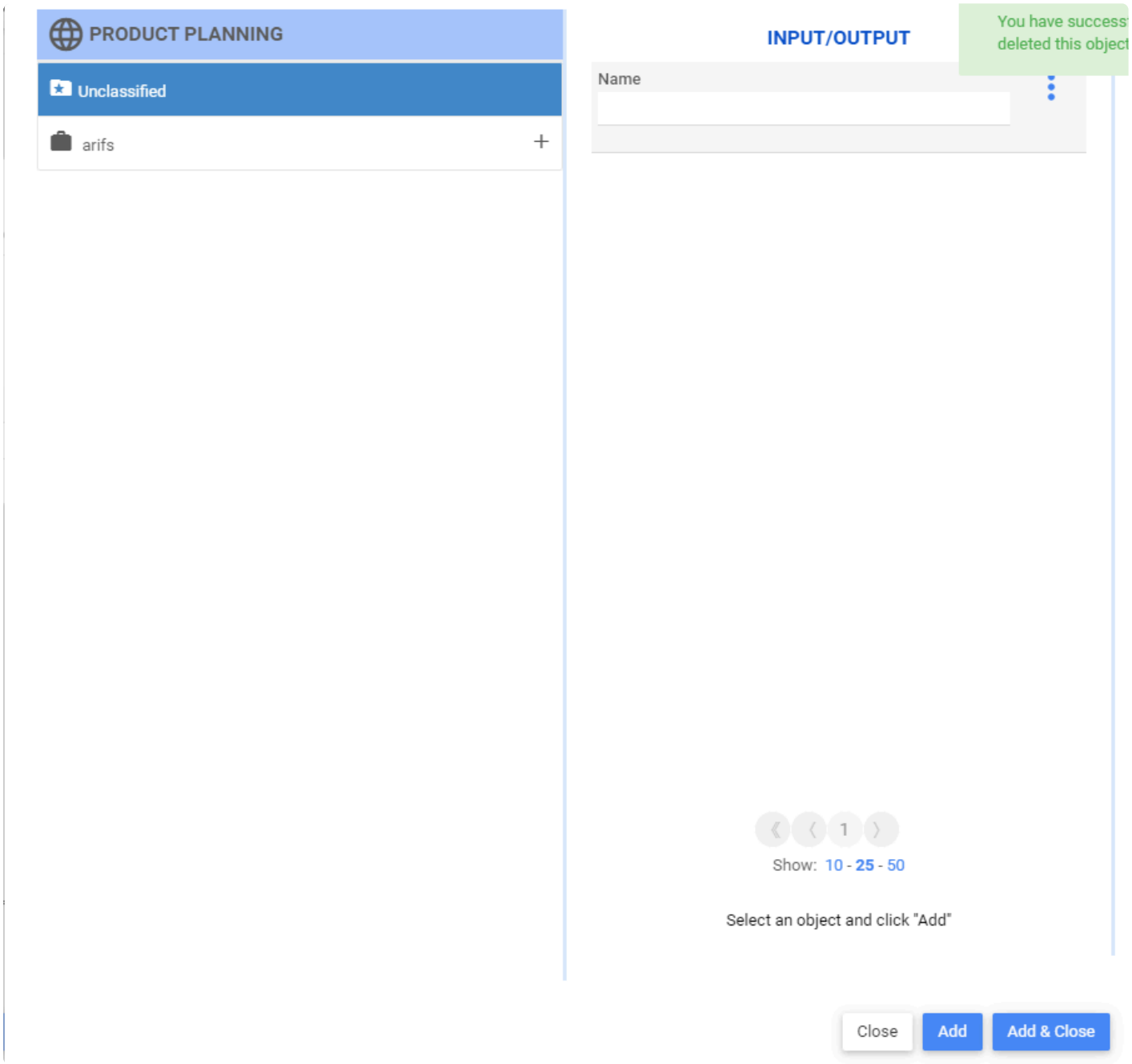
2. Click on the “Delete” option.



3. A confirmation pop-up will appear. Click on “Delete”.



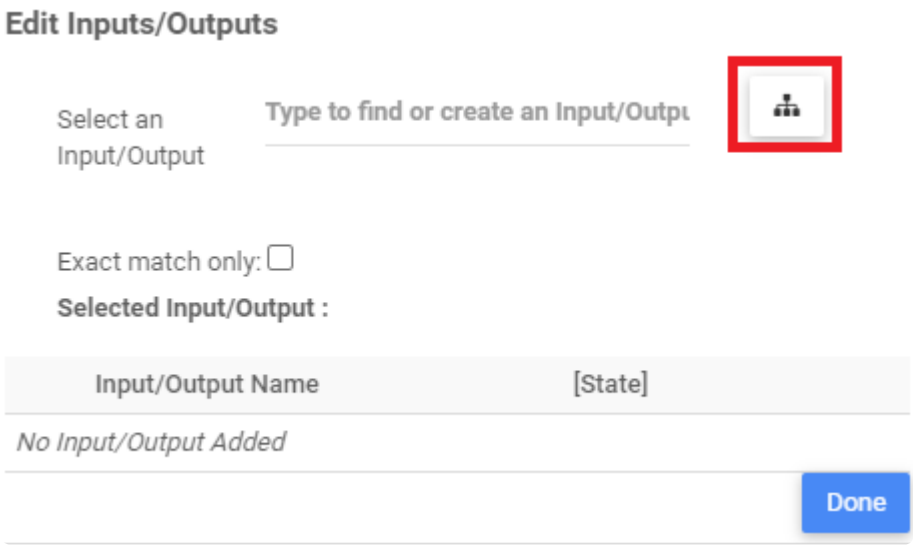
4. The list won’t display the input/output that has been deleted.



When deleting a folder or a set, all the content within will also be deleted, like anywhere else in the WebApp.

12.2.2.8.4 Tree selector – Merge Inputs and Outputs

To reach the tree selector window, you need to click on the following button. Steps to get there are detailed in [Inputs and Outputs](#).

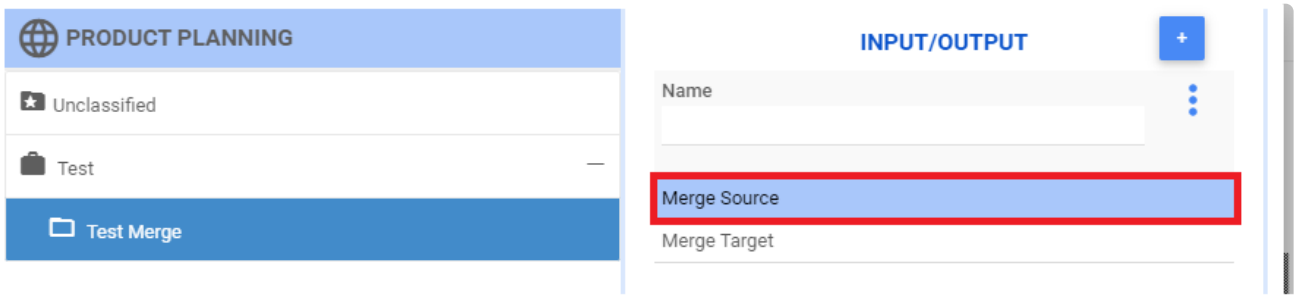


To merge content, **everything** is done through **right-clicking**.

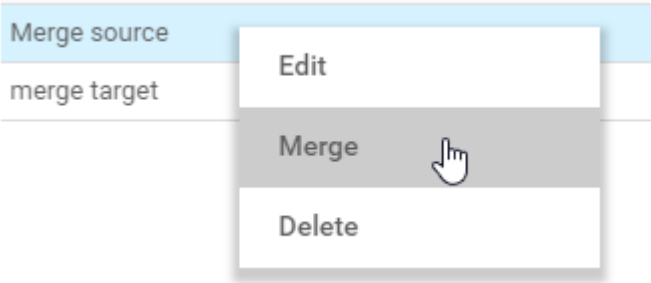
Instructions to merge content

> The merge action is available only for the inputs/outputs.

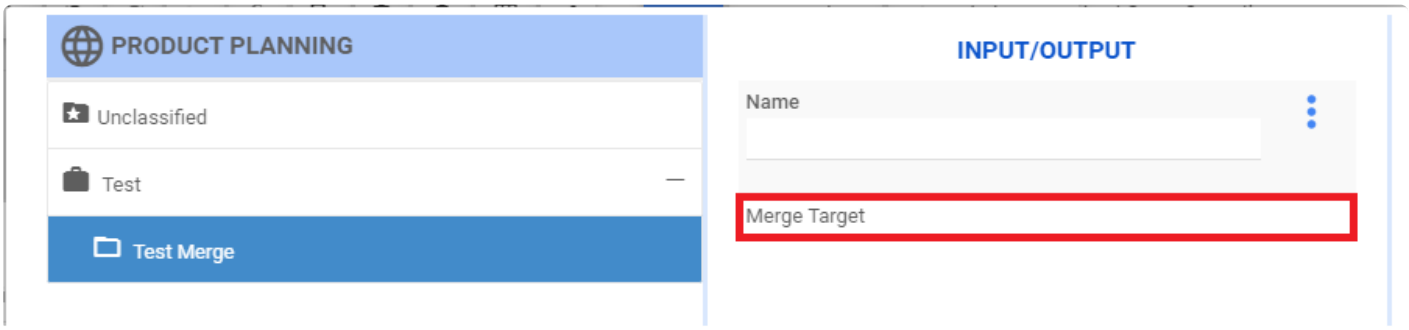
1. Right-click on the object of interest that you want to merge to another input/output.



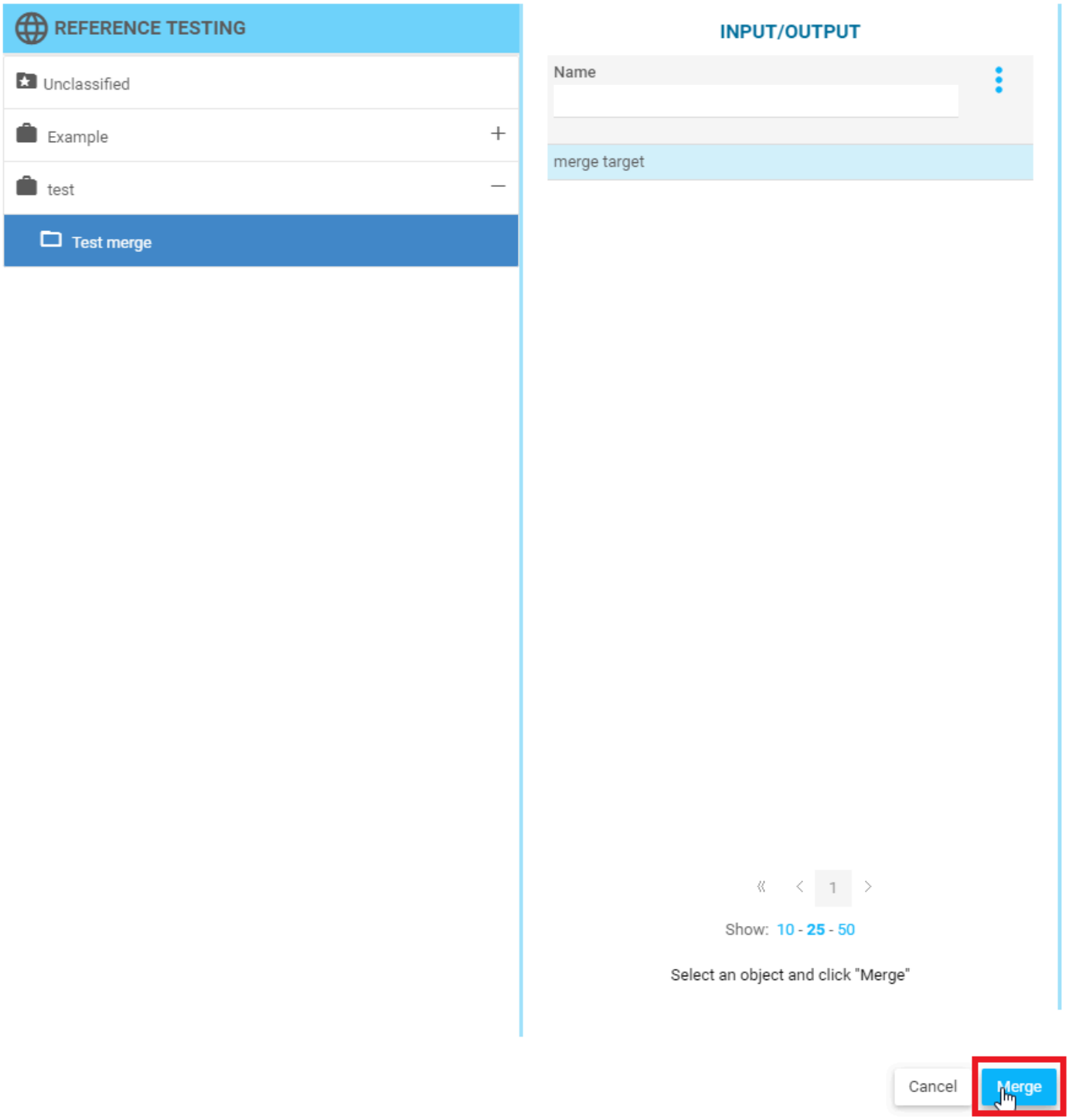
2. Click on the “Merge” option.



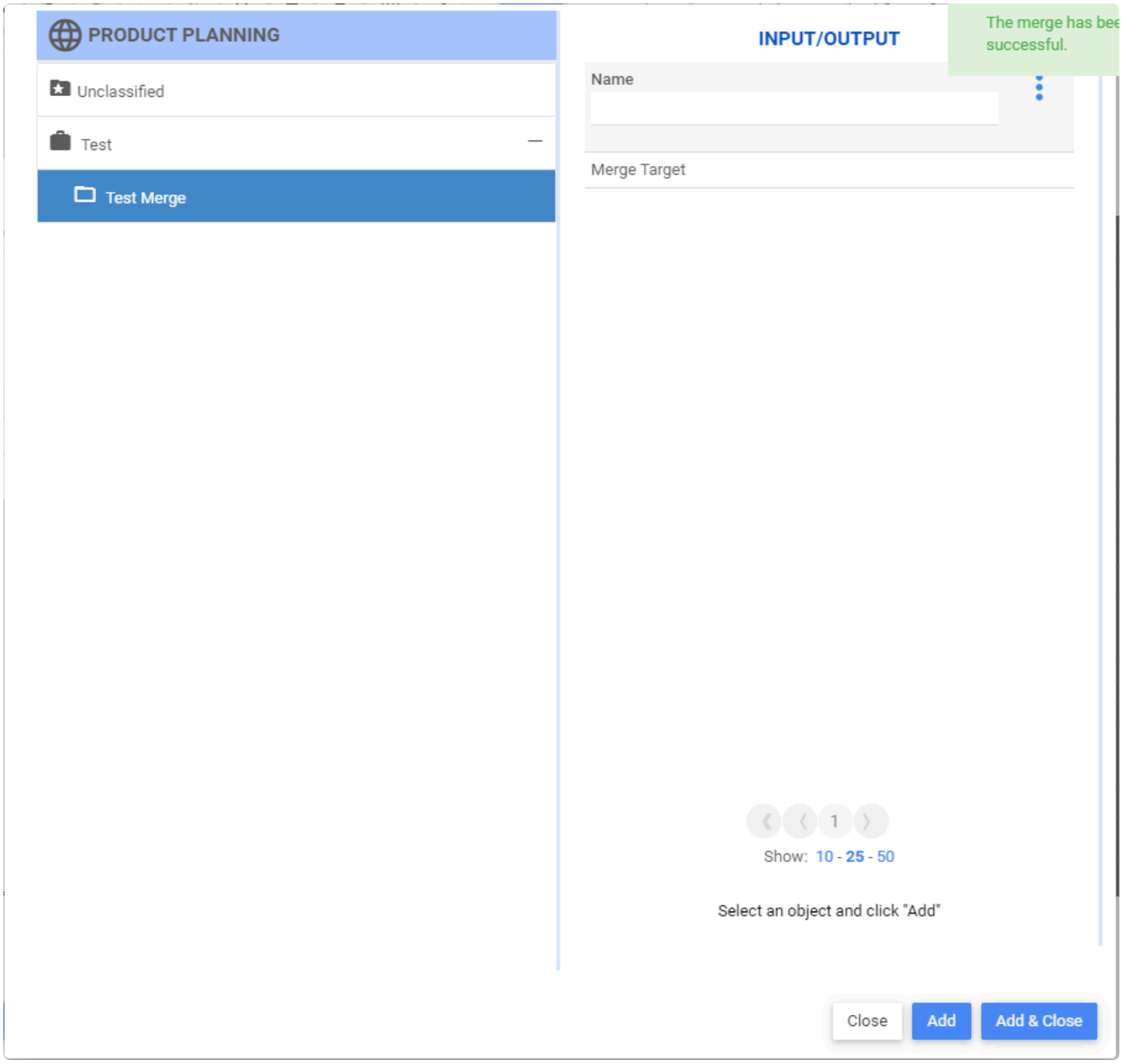
3. A second tree selector will open. The input/output selected is filtered out of the list. Select the input/output that you want your first selected input/output to be merged to.



4. Click on the “Merge” button.



5. The list won't display the input/output that has been merged.


PRODUCT PLANNING
Unclassified
Test
Test Merge
INPUT/OUTPUT
The merge has bee
successful.
Name
Merge Target
1
Show: 10 - 25 - 50
Select an object and click "Add"
Close
Add
Add & Close

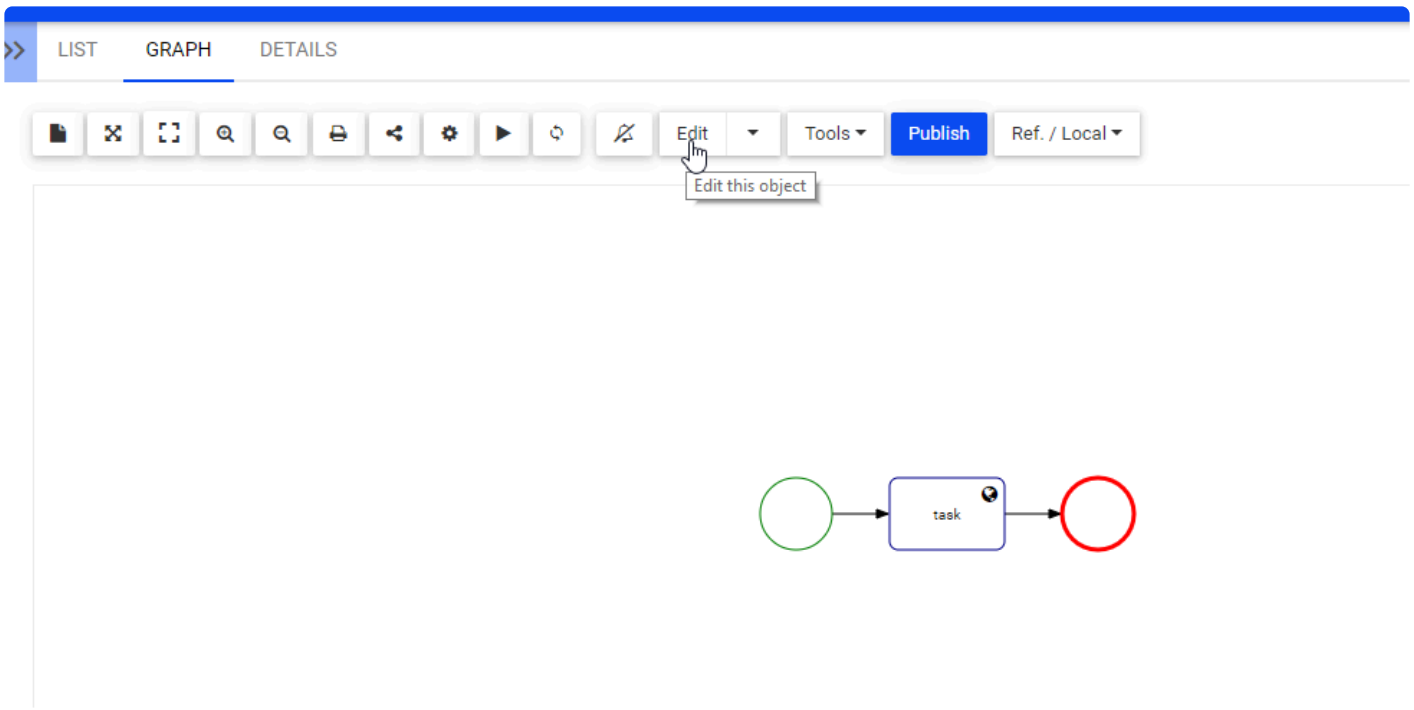
12.2.2.8.5 Tree selector – Plus “+” button

In the tree selector, different actions can be managed through the right-click option, including the creation of new objects. But the creation can also be done through the “+” button that is located at the top right of the tree selector window.

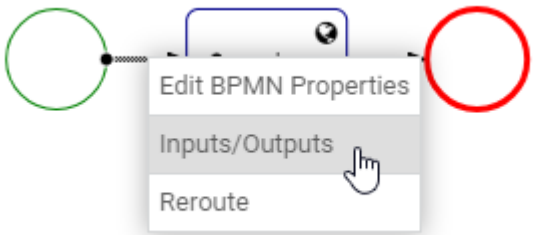
The button displays the option according to the existing content. It also takes into consideration if objects are selected or not.

> The following steps only have to be followed in order for the first time content is created. Once there is existing content, the “+” button will list all potential objects.

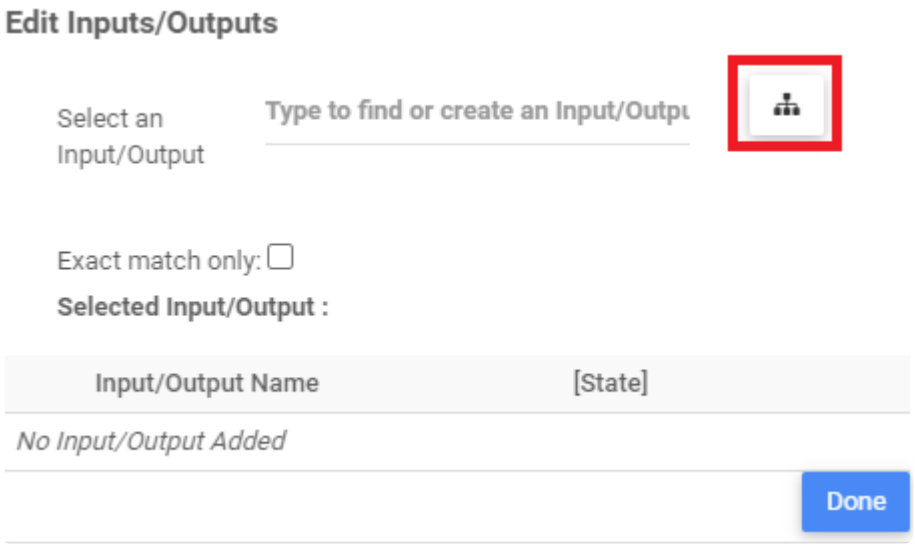
1. Access a process in which you want to add an input/output.



2. Right-click on a transition and click on “Inputs/Outputs”.



3. Select the tree selector icon.

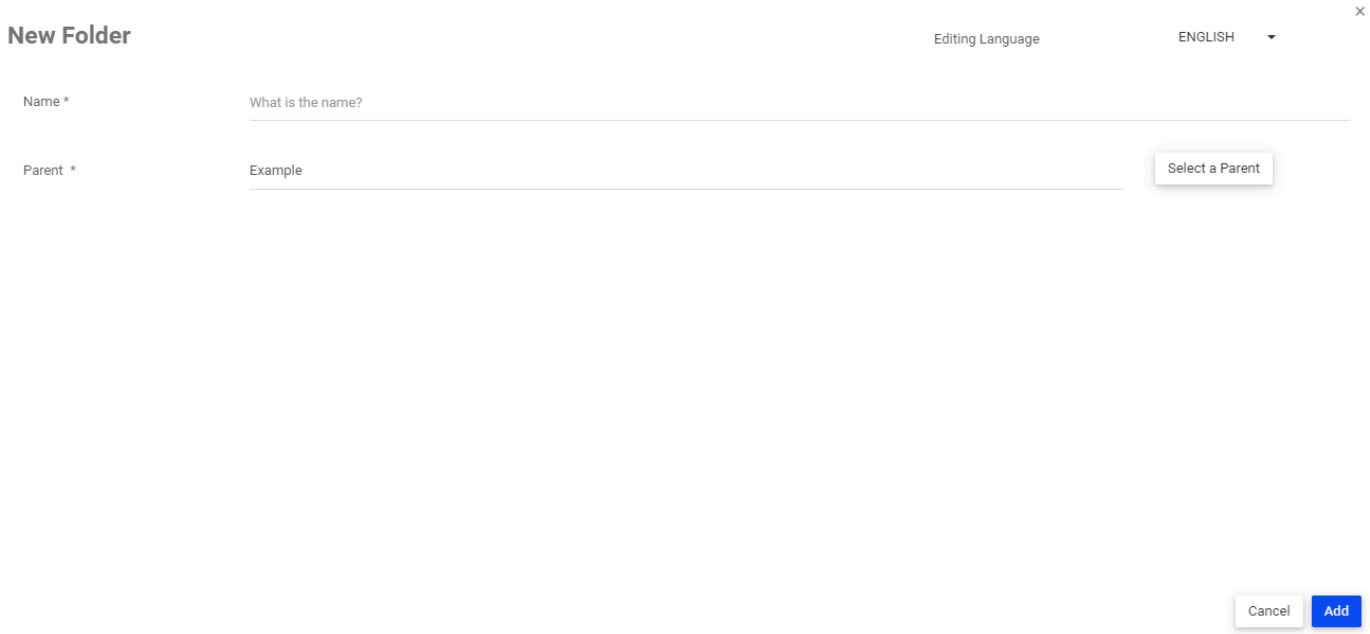


4. Click on the “+” button. Select “New Set”.

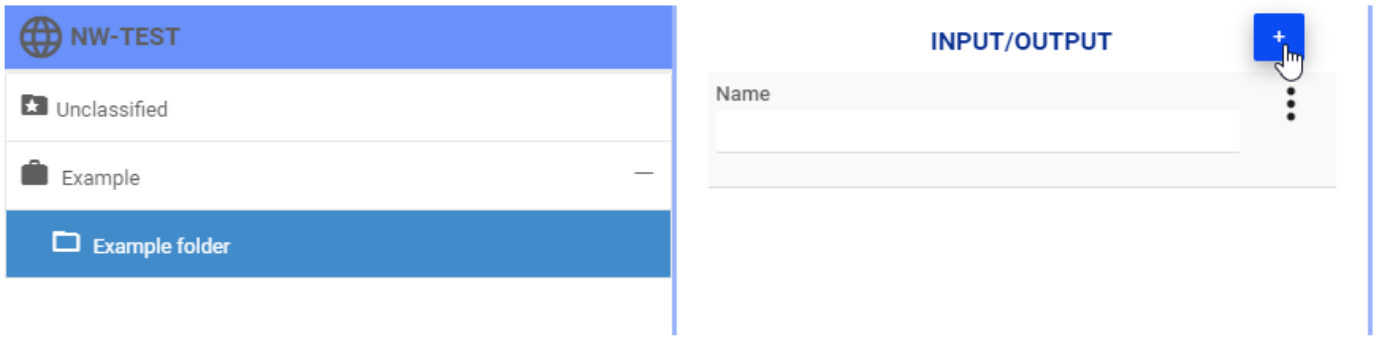
5. The New Set page opens up. Enter the name of the “New Set” and click on the **Add** button.

6. Select the Set and click on the “+” button.

7. The New Folder page opens up. The same way you did for the set, you can enter the name of the “New Folder” and click on the **Add** button.



8. Select the Folder and click on the “+” button. Select “New Input/Output”.



9. The New Input/Output page opens up. The same way you did for the set and folder, you can enter the name of the “New Input/Output” and click on the **Add** button.

10. You can view and change different options in the page that opens:

- The name of the Input/Output
- Display of the selected Folder, that will become the parent of the input/output
- The option to select another available parent

11. Once the Input/Output is created, it will be found in the list, under the selected parent.

When nothing is selected, the “+” button will list all possible options that can be created, according to existing content.

12.2.2.9 Edit Responsibilities From Graph Edit

Modelers are able to add roles, organizational units, resources, assets and assign a responsibilities to them directly in Graph Edit mode. Modelers are able to assign responsibilities to one flow object at a time or to multiple flow objects at the same time. Responsibilities are organized in the form of a RASCI-VS matrix.

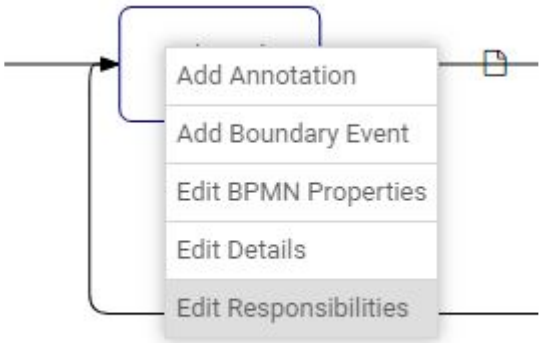
Editing responsibilities directly from the Graph increases mapping speed; users no longer have to open up the details page for each flow object to assign responsibilities.

> Changes in responsibilities using the RASCI widget are saved in memory. It is important to save the graph after assigning responsibilities from the graph edit to reflect the changes

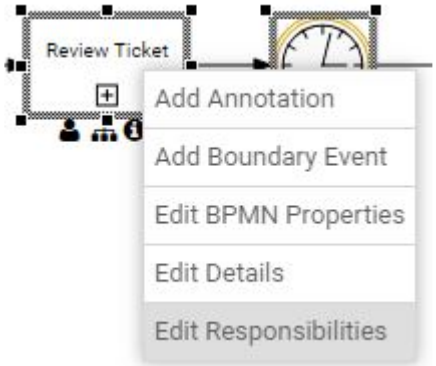
See the instructions to edit responsibilities below.

1. Users have 3 options for editing responsibilities from the map:

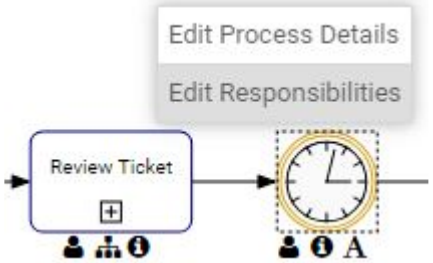
- To edit responsibilities for a single flow object, right-click on a single flow object and click on “Edit Responsibilities”



- To edit responsibilities for multiple shapes, hold down the control key and select the desired shapes and click on “Edit Responsibilities”

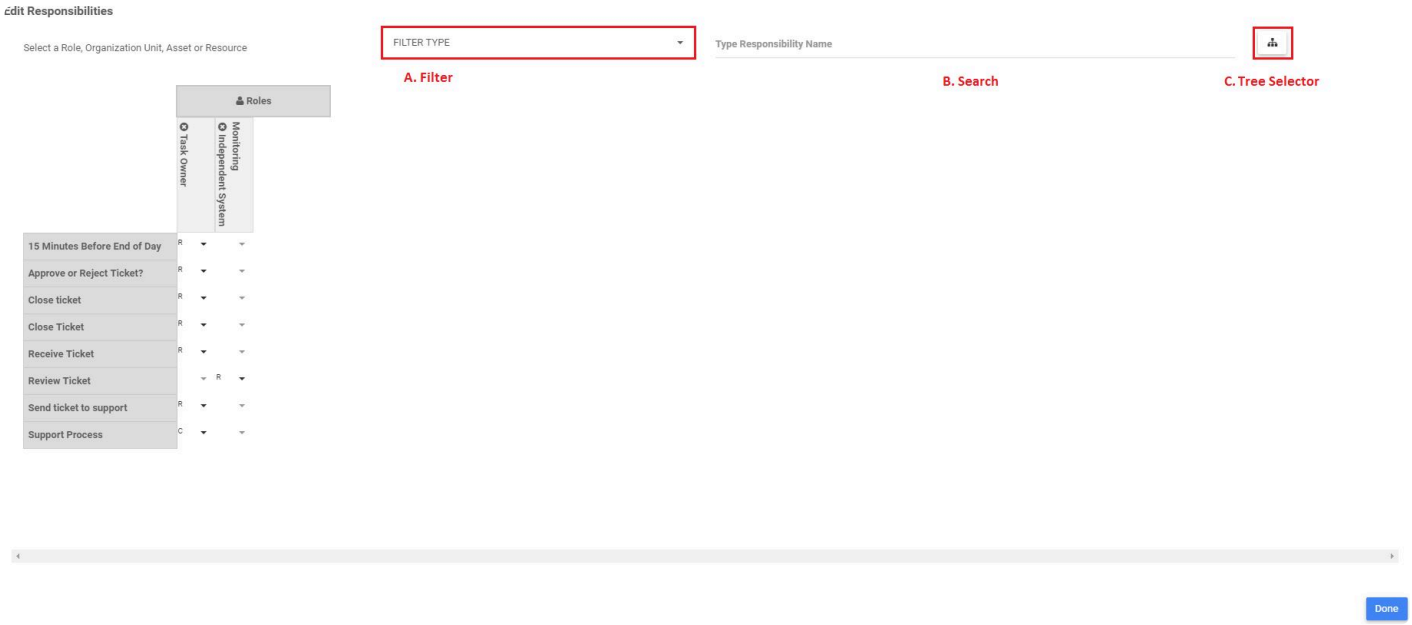


- To edit the responsibilities for ALL shapes, right click on an empty space in the map and click on “Edit Responsibilities”



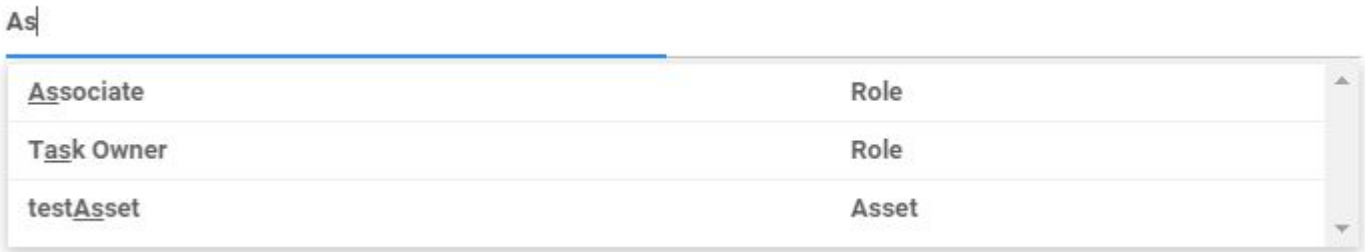
2. To select a role, use the search or the tree selector.

> **!** If no responsibilities are assigned to the flow object, the widget will display “No Responsibilities Assigned”, regardless of the amount of flow objects selected. After a role, resource, organizational unit is added, the flow object name will appear on the vertical axis.

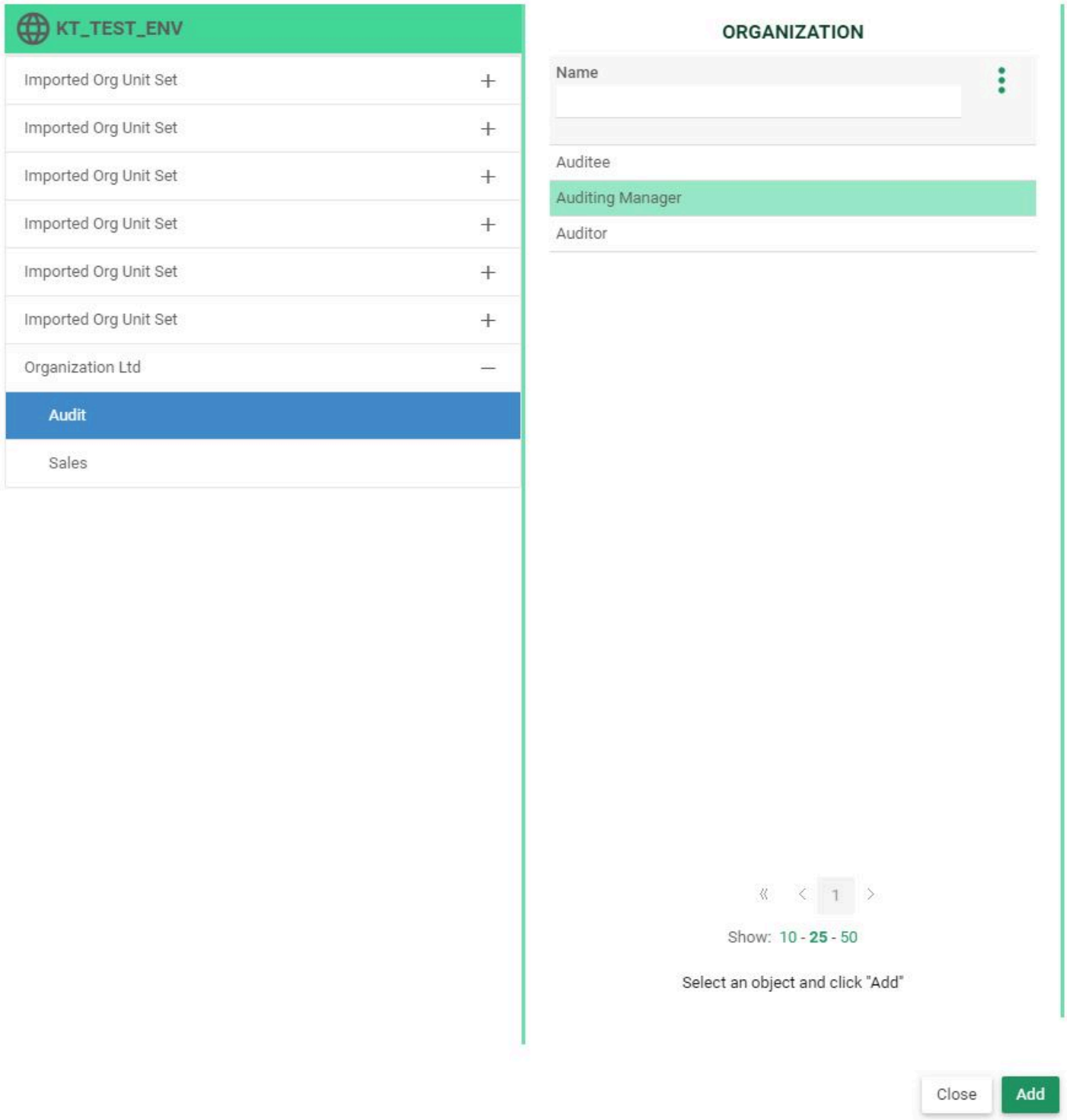


2A. The filter allows the user to select a resource, role, asset or organizational role. When selected, only organizational objects of that type will be displayed in the search bar

2B. The search allows users to type in search values. The search values will be displayed in a dropdown as the values are being typed.



2B. The tree selector allows users to browse organizational objects and select them



3. After a role, resource, organizational unit or asset has been selected, select the responsibility by clicking on the ▼ button in the empty cell to bring up the RASCI-VS dropdown.

4. Click “Done” or outside of the widget to close the responsibility widget

12.2.2.10 Auto-Sequence

Sequence number are normally numerical values that are assigned to flow objects that dictates the order or flow of the process. It allows the user to easily read a map, as well as identify the order of events when viewing the process in the details page.

Users have the ability to automatically add sequence numbers to all flow objects within a process map. This provides a quicker alternative to editing each flow object individually to assign sequence numbers. It also allow

Auto-Sequence will assign sequence numbers to:

- Tasks
- Sub-processes
- Events (Start, Intermediate, End)
- Shortcuts & References

The priority of sequence number assignment is as follows:
1. Flow objects to the leftmost part of the map
2. Flow objects to the topmost part of the map

The position of flow objects is taken according to the top left corner position of the flow object. See below for an example of how flow objects will be sequenced.

Flow objects within a sub-process will automatically inherit the parent's sequence numbers if the user auto-sequences.

e.g. subprocess A has sequence number 2.3. If the user uses auto-sequence inside subprocess A, the flow objects will have sequence number 2.3.1, 2.3.2, etc automatically.

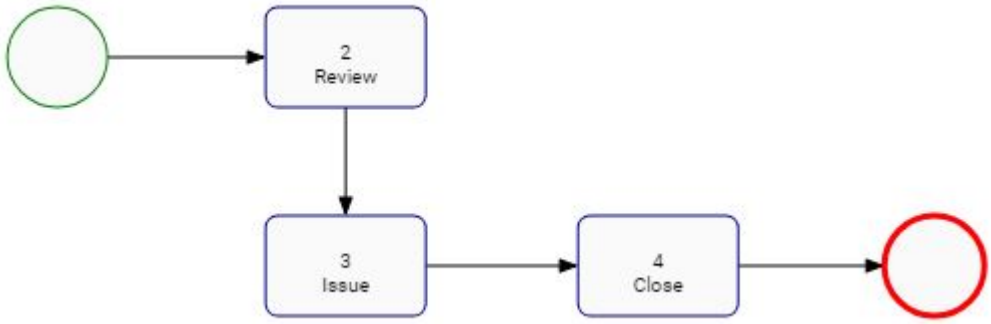
> If users want a specific format for a sequence number of a parent process, it can be done through the details page of the sub-process. E.g. parent process' sequence number is AB; its children flow objects will be numbered AB1, AB2, etc. See Edit Details for more information. However, custom sequence numbers must be done manually.

To auto-sequence a process:

1. Make sure you are in graph edit mode

2. Right-click on a blank space
3. Click on Auto-Sequence

The flow object to the left-topmost part of the map will be given the first sequence number, then the second flow object to the left-topmost flow object, etc.



12.2.2.11 Swimlane

With the map process setting set to Swimlane, Web Modelers can directly map a processes within lanes and pools.

The way to map a process is slightly different than when to map in graph view.
How to map a process: Map a process

In this section, you'll learn:

- How to change the display from graph to Swimlanes
- When/why new lanes are added automatically to the map
- Rules of the RASCI-VS
- Assets and Artifacts are independent of RASCI-VS

12.2.2.11.1 Display

To modify the display from graph to swimlanes or Matrix:

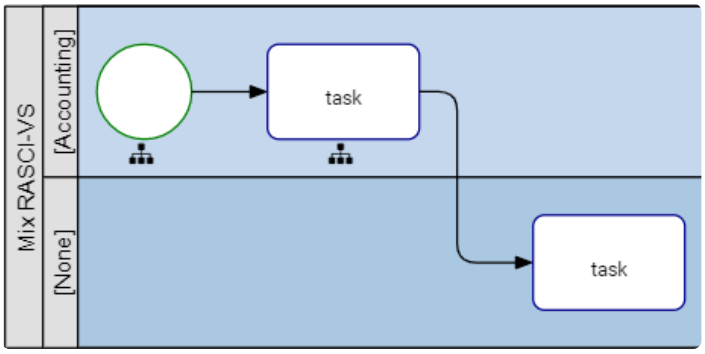
Map display

Process display preference

12.2.2.11.2 New lane added automatically

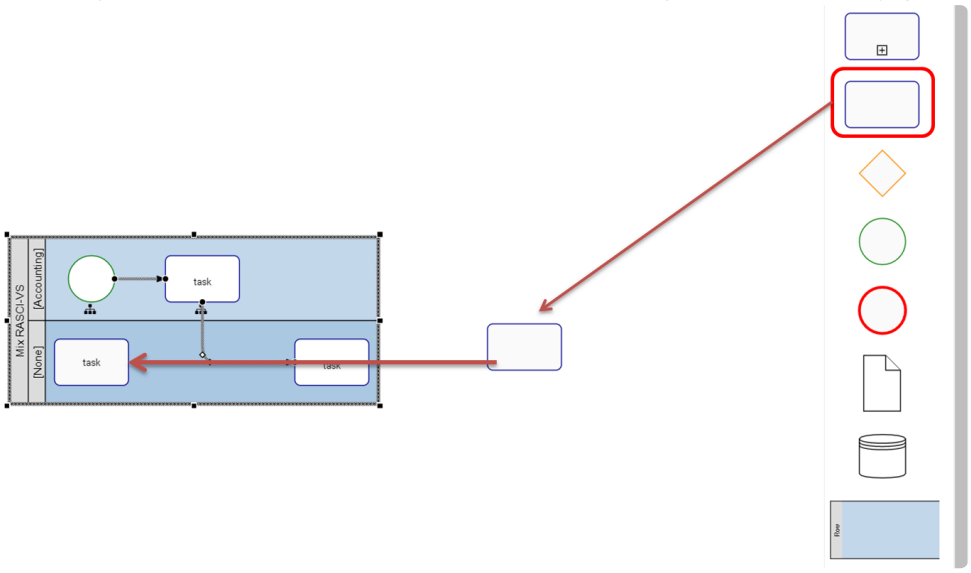
In swimlane, there is four ways that a lane is added automatically:

1. When an object does not have an “R” assign to it, then it’s automatically move to a new lane label “None”;

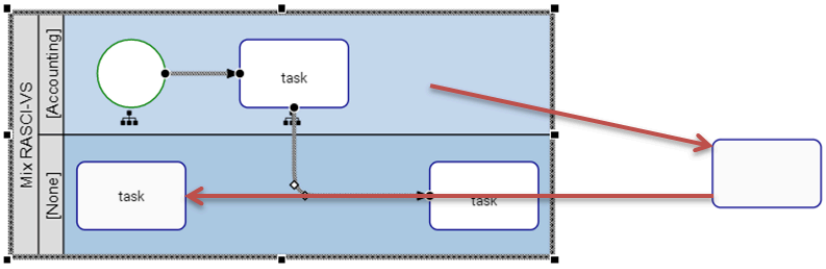


> ! Asset and Artifacts cannot have a RASCI assign to them. Will automatically go to a “None” Lane.

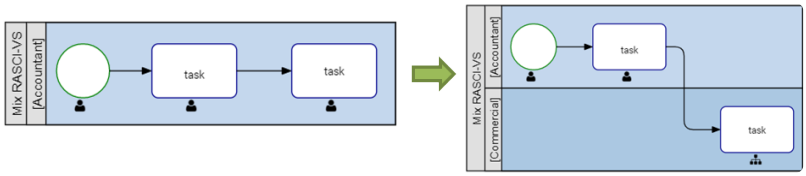
2. If an object is added outside the lanes, then that object automatically goes into a lane label “None”;



3. If an object is drop from a lane to outside the graph, this object goes into the “none” lane.



4.When another R is added, the system will add a new lane automatically.

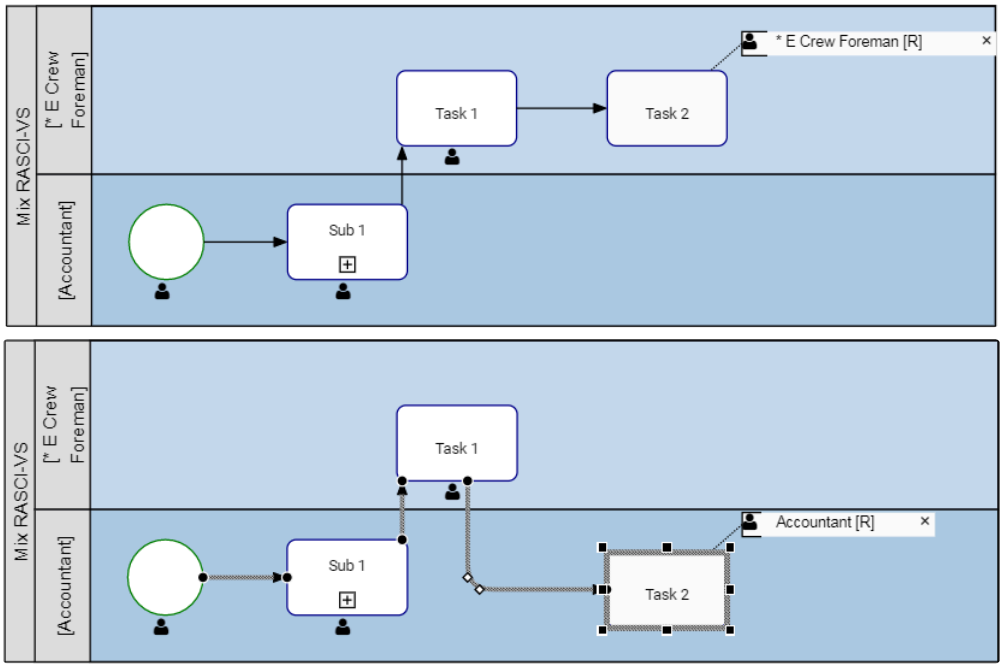


When a lane only have 1 object and the Lane already has an ‘R’, if another RASCi of “R” type is added, then it won’t create a second lane. * *To add multiple lanes, a lane must have at least 2 objects.

12.2.2.11.3 Rules of the RASCI “R”

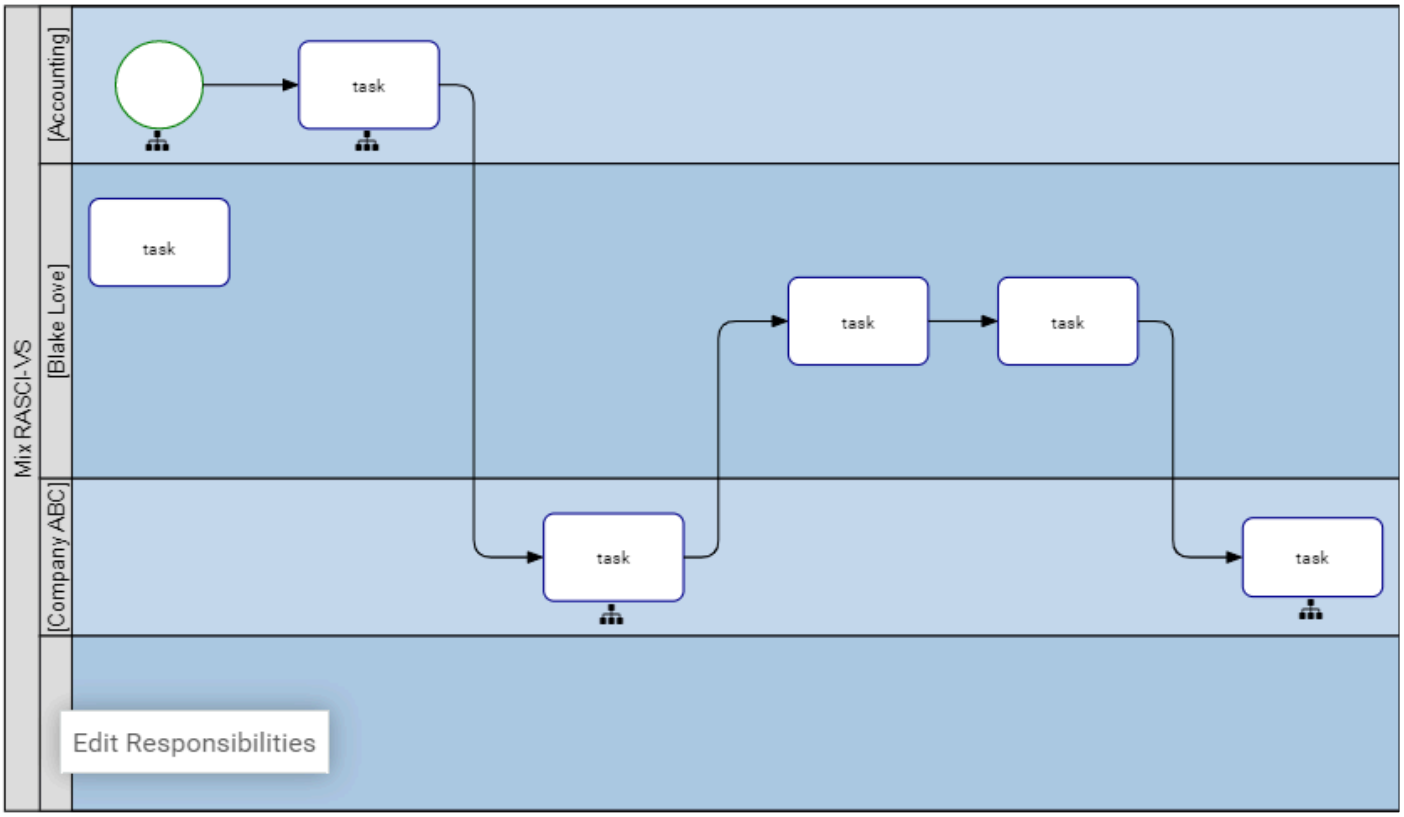
Changing objects from one lane to another

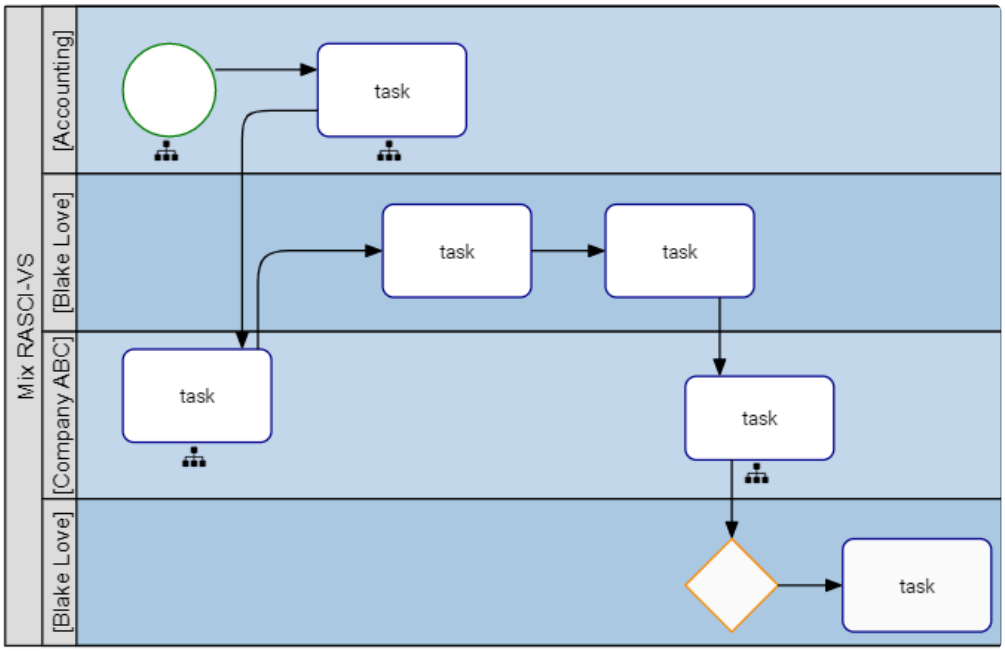
If another RASCI is added after the “R” and I change this object to another lane, this object keeps the other type of RASCI as is but the type “R” will change to be the same as the new lane. No matter how many times I switch lanes, the “R” will always update to the new one.



2 lanes with the same “R”

If a lane is added manually and then the responsible is added directly on the lane (there is no object in the lane yet), the system allows having 2 lanes with the same “R”, but won’t let you save the graph. If the responsible is added to the object, then the system will merge the objects in the same lane.


Mix RASCI-VS
[Accounting]
[Blake Love]
[Company ABC]
task
task
task
task
task
task
Edit Responsibilities


Mix RASCI-VS
[Accounting]
[Blake Love]
[Company ABC]
[Blake Love]
task
task
task
task
task
task

12.2.3 Edit Process Objects

Web Modelers can edit the Details of a Process. They need to navigate to the Edit button of the process to access the Edit Details window. The Edit Details window has three tabs, General, Properties, and Flow Objects. Under each tab there are different sections where the Web Modeler can input detailed information about the Process.

Web Modelers can choose the editing language in the Edit Details window.

Only users with the Web Modeler Permission will be able to see the Edit Button on the toolbar; the displayed content needs to be set to Show Latest, and the editing tool is the Web.

This section will cover the following:

1. Edit Process General Details
2. Edit Flow Object General Details
3. Edit Process Objects Properties Details
4. Edit Process Flow Object Details

12.2.3.1 Edit Process General Details

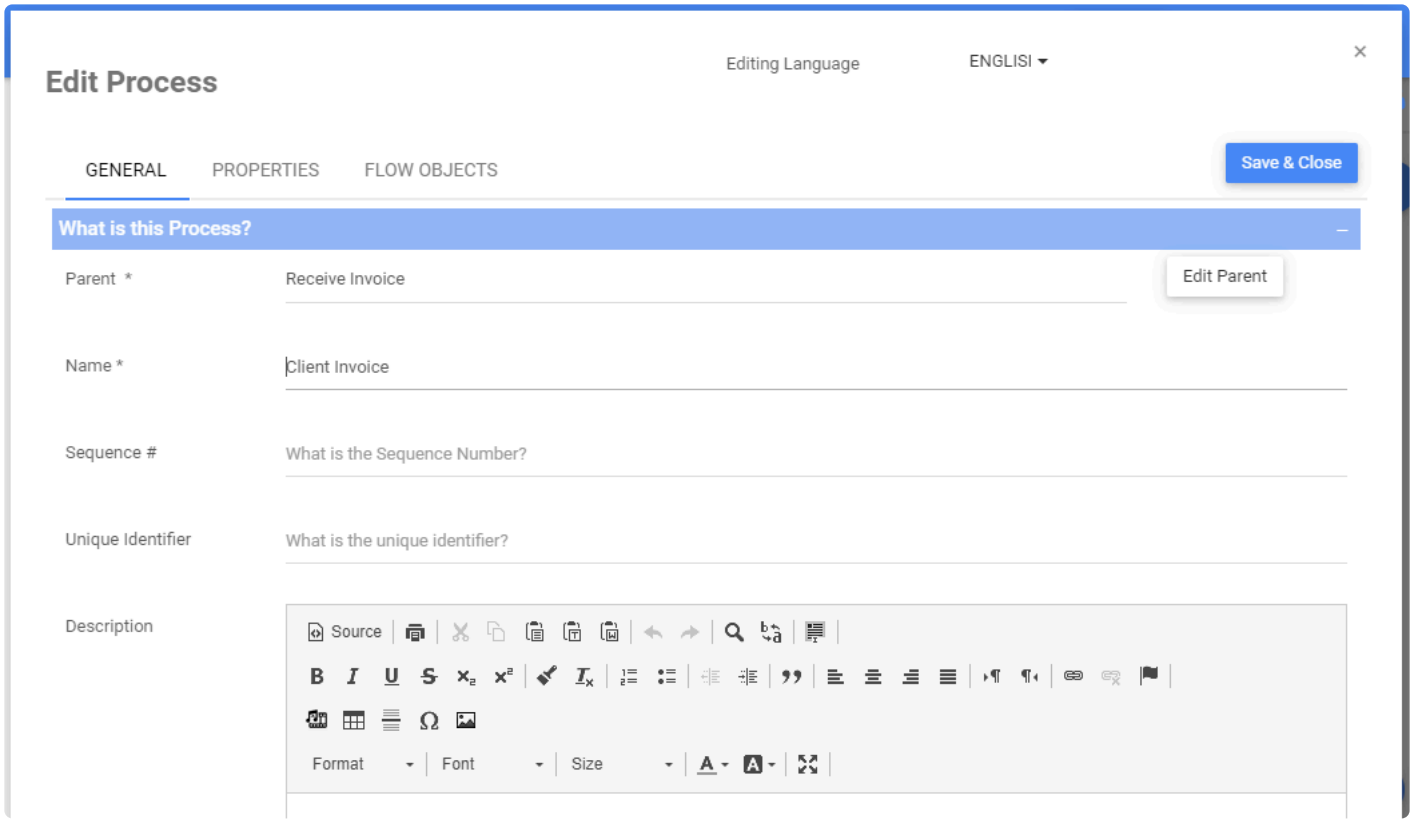
The General tab contains a section for the basic information about a process, as well as the Responsibilities and Associations sections.

What is this Process?

This table below describes the fields of this section.

Field	Description
Parent Set/ Process	The Parent Set or Process under which this process is nested.
Name	The name of the Process. A name is **mandatory** for all objects.
Sequence #	The Sequence Number of the process. This is a numerical value and normally reflects the flow of processes and activities.
Unique Identifier	The Unique Identifier of the process. This serves to uniquely identify the Process as per your company protocol.
Description	This field describes the process in detail, including the process procedures. The rich text format allows for text formatting, images, URLs, tables, etc.

Goal	The Goal of the process. The rich text format allows for text formatting, images, URLs, tables, etc.



h2. Responsibilities and Associations

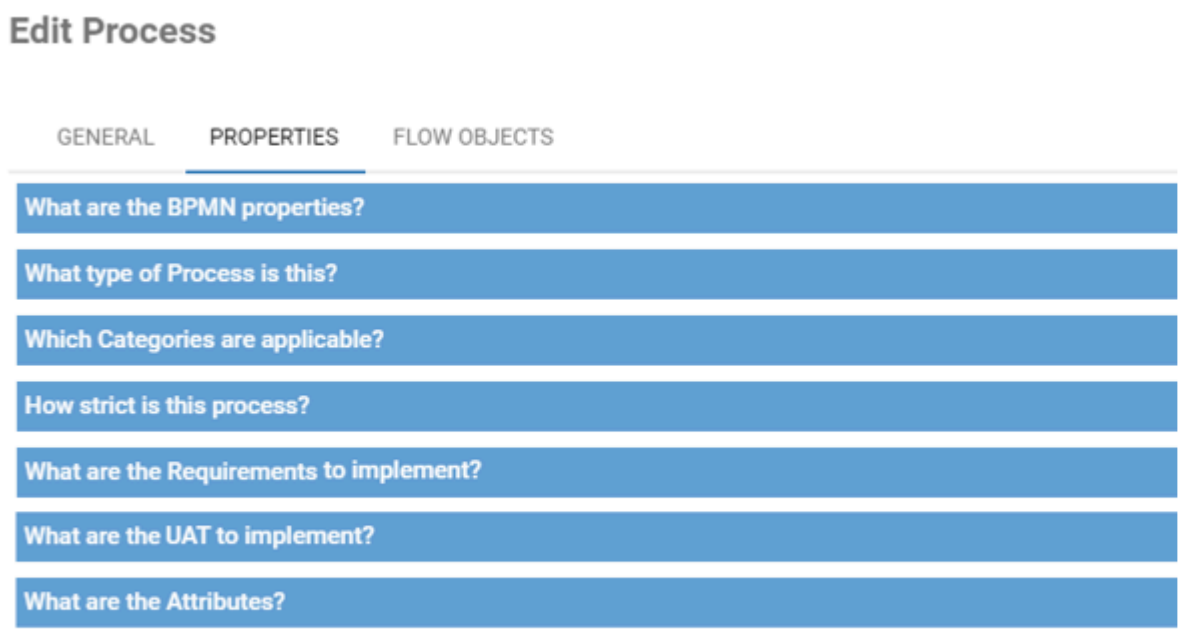
Since the Responsibilities and Associations sections are common to many EPC objects, the instructions have been centralized in the Associations section of the user manual. You can find direct links to instructions for specific sections below.

Section	Instructions
What are the Responsibilities?	Assign Responsibilities
Which Documents are used?	Associate Documents
How is Performance Measured?	Associate Performance
Which Business Rules are Applicable?	Associate Business Rules
Which Risks are Applicable?	Associate Risks
Which Controls are Applicable?	Associate Controls

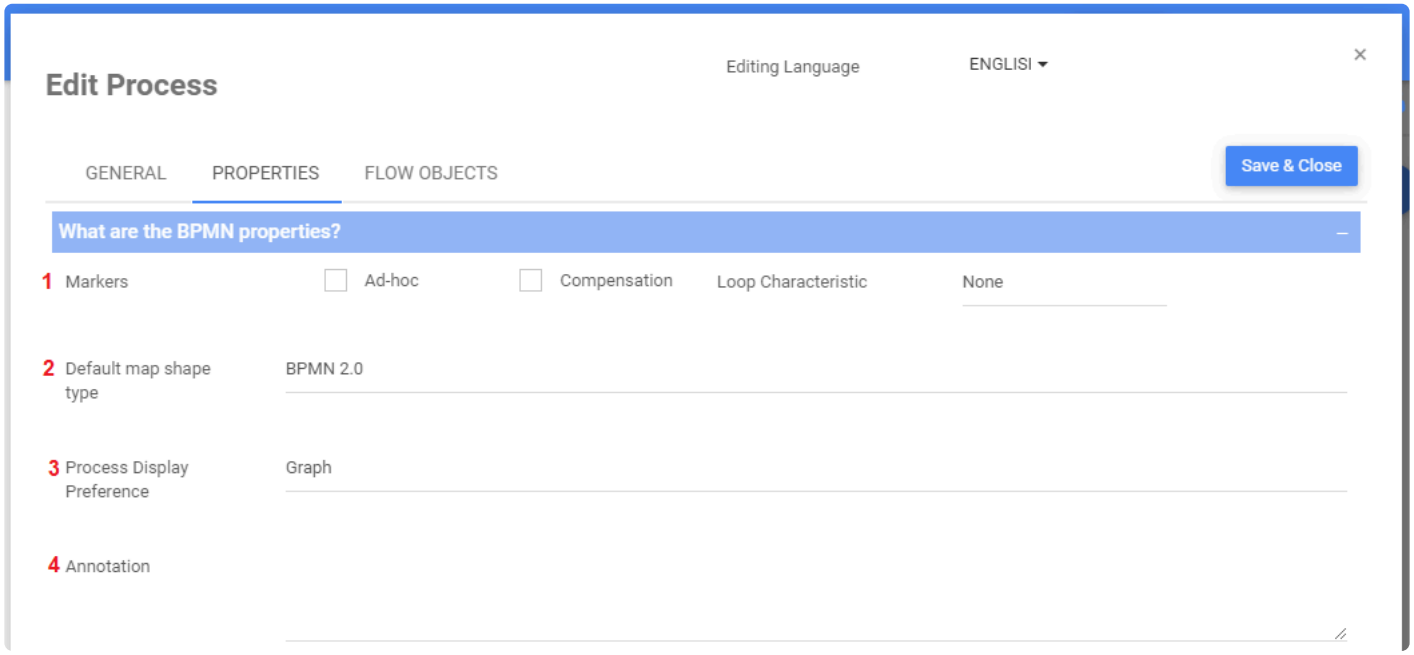
12.2.3.2 Edit Process Objects Properties Details

The Properties tab for Processses contains sections for the BPMN Properties, the type, the categories applicable and the attributes.

The Properties tab for Flow Objects contains sections for the categories applicable and the attributes.



What are the BPMN Properties?



1. Markers

Process shapes can have various markers to denote special characteristics. Markers are part of OMGs BPMN 2.0 Standard. Find the name, icon, and a brief description of each marker below.

Marker	Icon	Description
Ad Hoc		A process that can occur at any moment. Is not a predecessor or successor in a sequence of processes or activities.
Compensation		A process that serves to compensate for a compensation-type event.
Loop Characteristic: Loop		A process that repeats until a specific trigger stops it.

Loop Characteristic: Parallel		The same process runs in parallel, executed by different performers.
Loop Characteristic: Sequential		The process is executed in a sequential order.

> The viewing user must be viewing the process shape in “BPMN 2.0” shape type. This can be toggled on the “Shape Type” in process map options.

2. Default Map Shape Type

As a Web Modeler, you can define the default shape type of the process shape in the process map. See the table below for the option name and description.

Shape Type	Description
BPMN 2.0 (default)	Standard BPMN Flow Objects **with** Icons
Simple BPMN	Standard BPMN Flow Objects **without** Icons
VSM	Standard Value Stream Mapping Shapes
Custom	Custom Flowchart Shapes

> The viewing user must have the map option “Shape Type” as “Modeler Default” for maps to appear with the default shape type. See Map Options for instructions on how to change this setting.

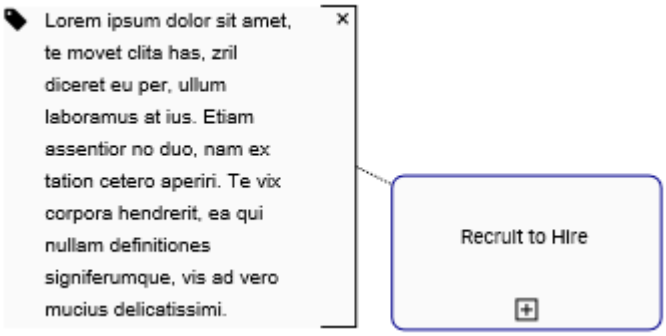
3. Process Display Preference

Process Display Preferences allow a modeler to set a “preferred view” for a specific process. When the map option “Process Preference” is selected by any user, the EPC will refer to this field to display this process map accordingly. The possible choices are:

- Graph
- Swimlanes
- Matrix Swimlanes

4. Annotation

Annotations serve as textual support on the process map. Each Process and Flow Object can have one annotation, which will display the text input in this field on the map attached to the relevant shape as show below.



> To see the Annotation expanded in the process map by default. The “Annotation” option must be set to “Annotation” in process map options. Otherwise if it set to “Icon”, the user must expand it by clicking on it.

Properties

Since all Properties sections are common to many EPC objects, the instructions have been centralized in the Properties section of the user manual. You can find direct links to instructions for specific sections below.

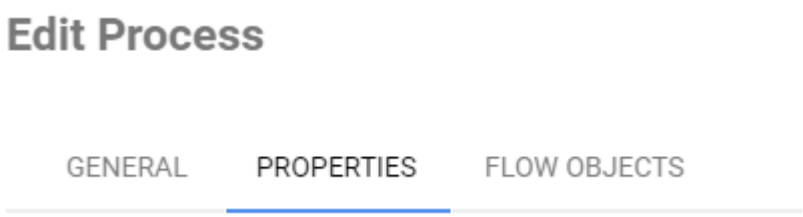
Section	Instructions
What type of [Object] is this?	Object Type
Which Categories are applicable?	Object Categories
How strict is this [Object]?	Data Harmonization
What are the Attributes?	Object Attributes

Object Requirements

The Object Requirements serves as a list of functions and rules the object is required to adhere by to ensure the Business Requirement is met.

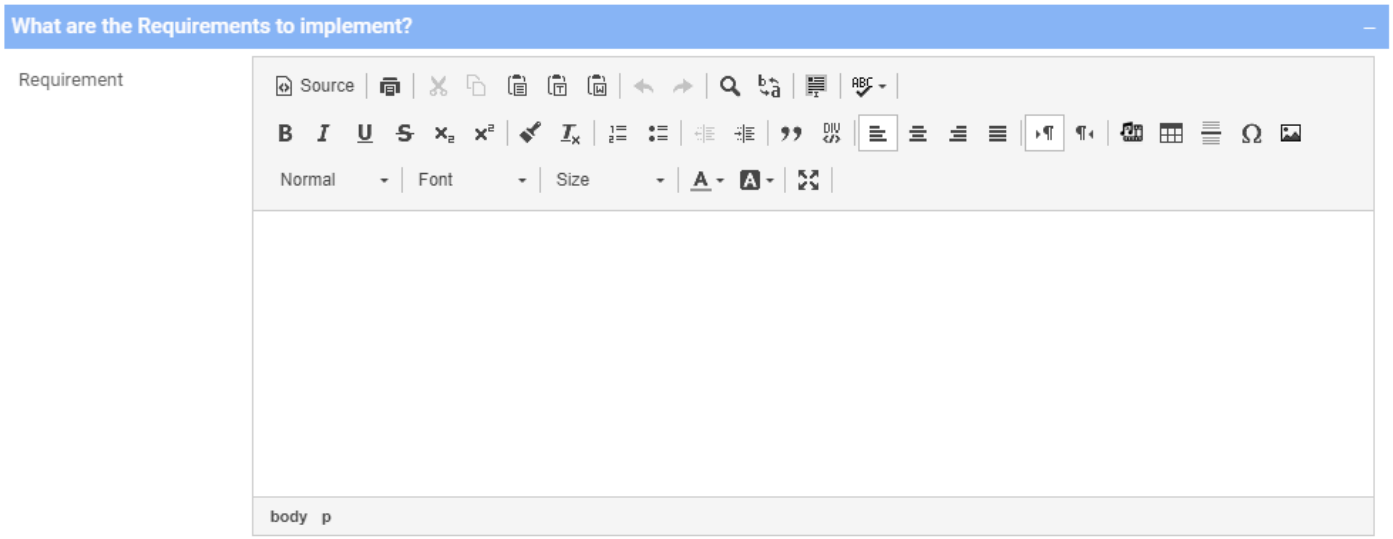
To use the Object Requirement feature, please see the following steps:

1. Navigate to the Properties’ tab of the “Details” page of a process



2. Click on What are the Requirements to implement ?

*3. Type the desired Requirements in the rich text box.

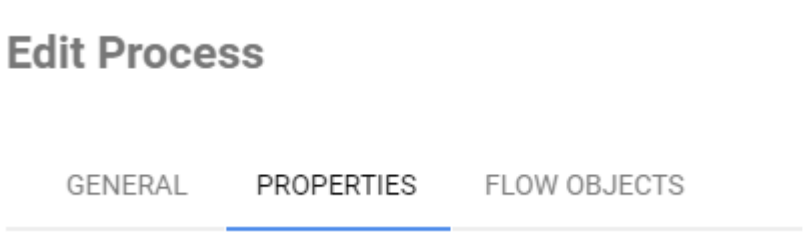


4. Click on the Save button

Object User Acceptance Test

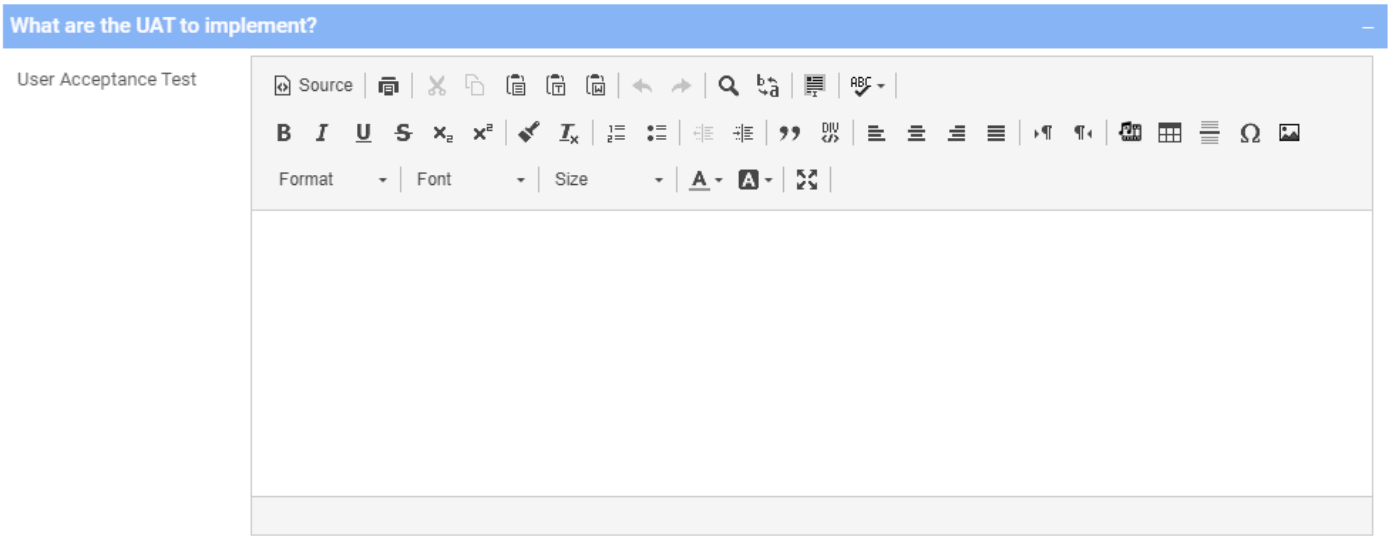
The Object User Acceptance Test serves as a check list of tests that are required to be passed to ensure the Business Requirement functions properly.

1. Navigate to the Properties' tab of the "Details" page of a process



2. Click on What are the UAT to implement?

3. Type the desired tests in the rich text box



4. Click on the Save button

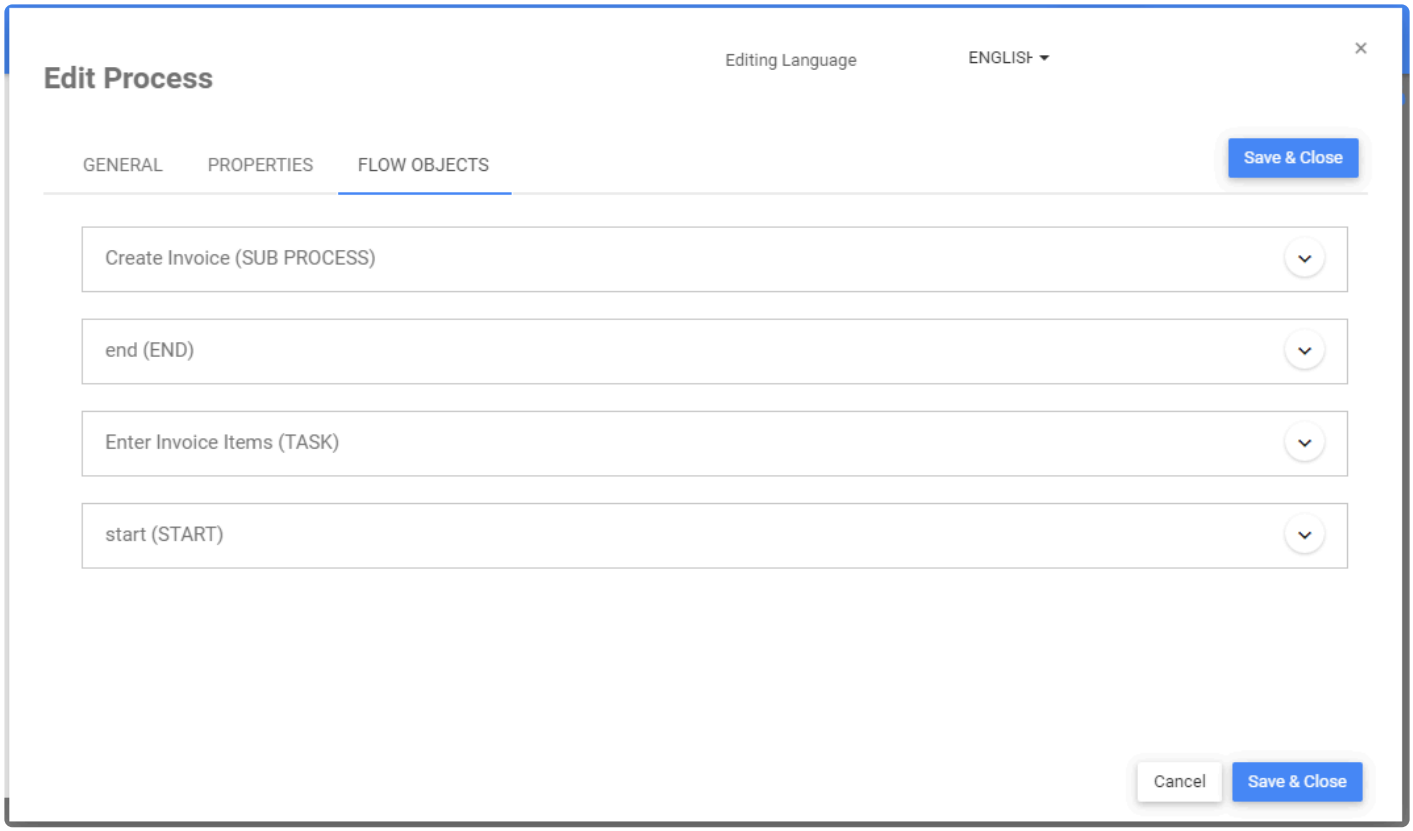
12.2.3.3 Edit Process Flow Objects Details

The Flow Objects tab contains all flow objects used in a process map. Web Modeler can edit the basic information about the flow object, its Responsibilities, its Associations, and its properties.

Web Modelers can edit the following Flow Objects:

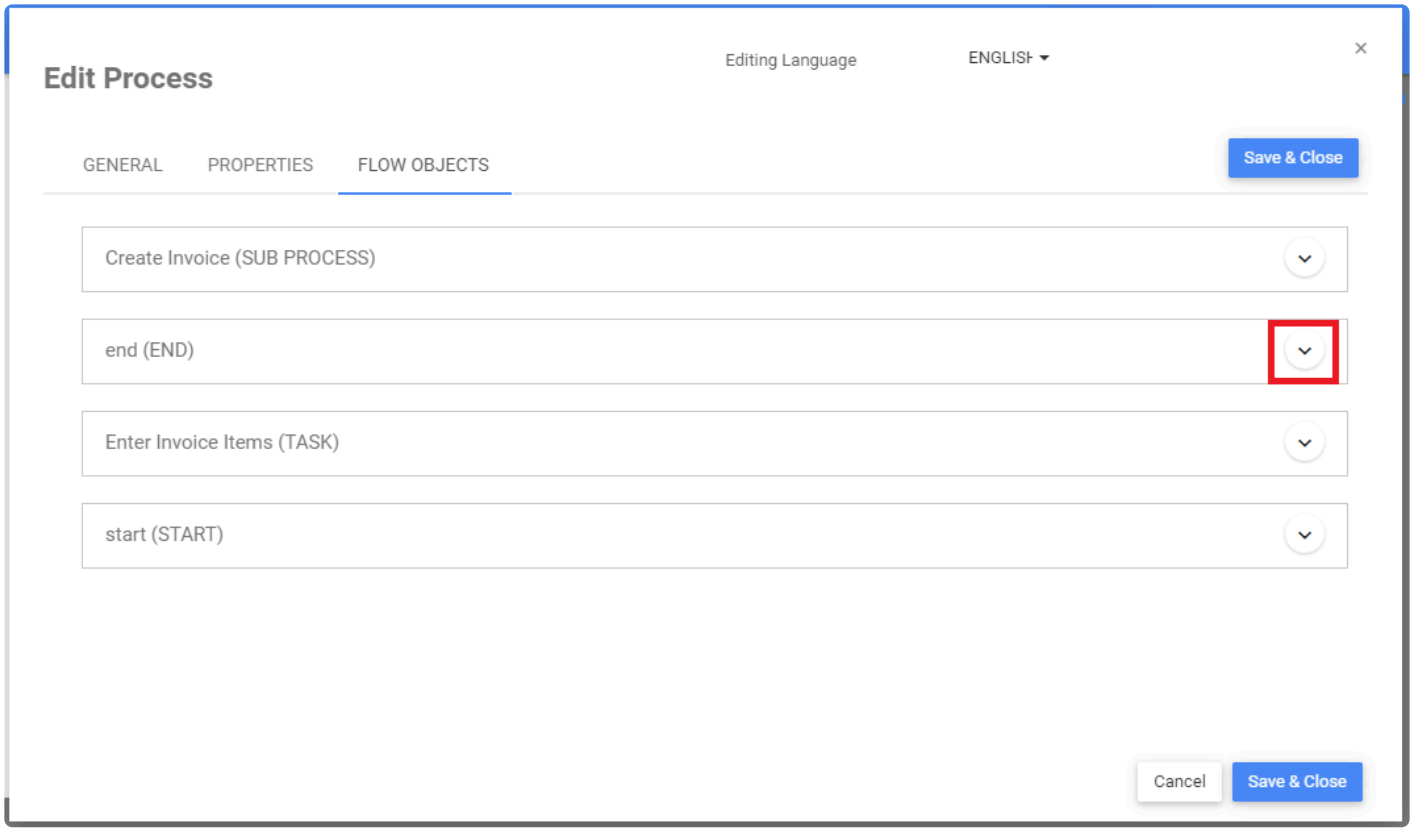
- Task
- Gateway
- Events

To edit Sub-Processes details, the Web Modeler needs to access the Edit button on the Details Page of the Sub-Process

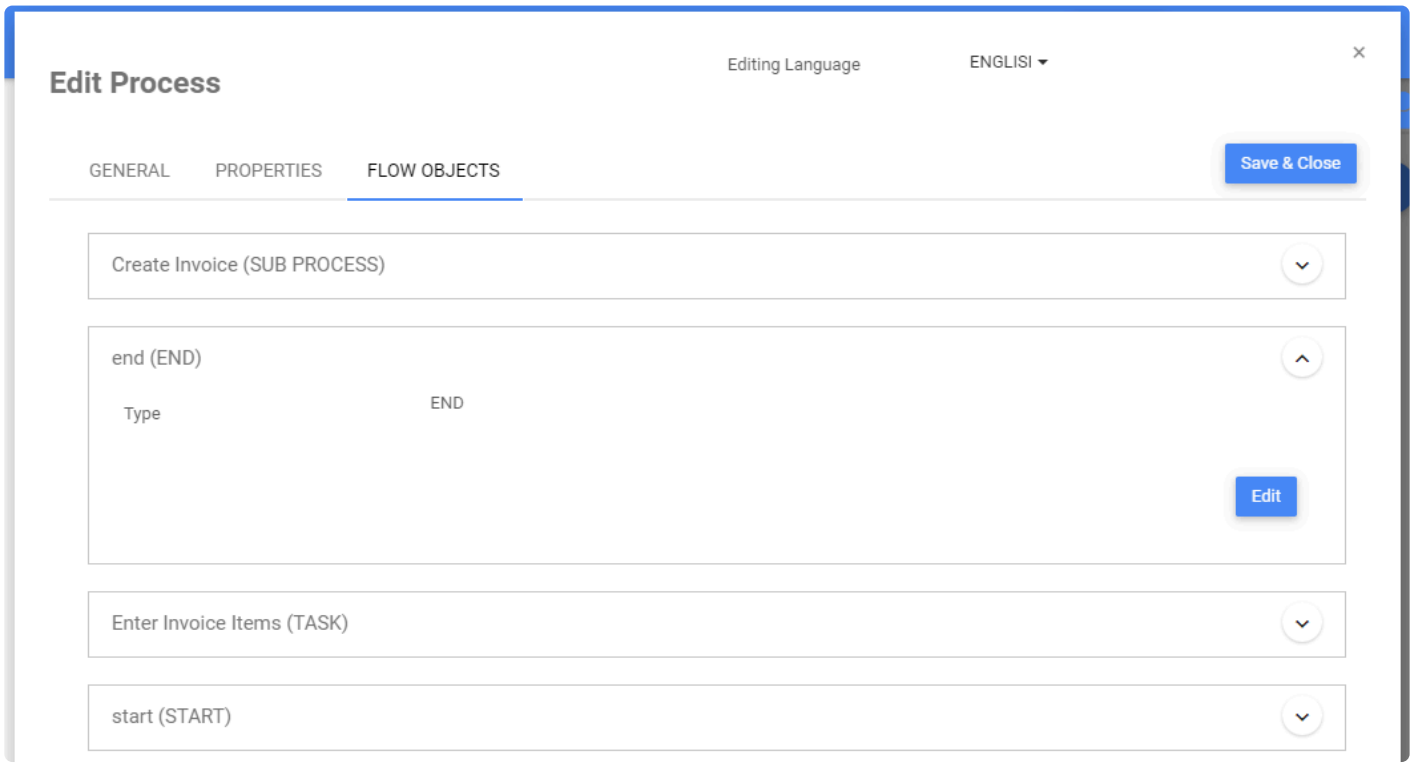


Edit a Flow Object

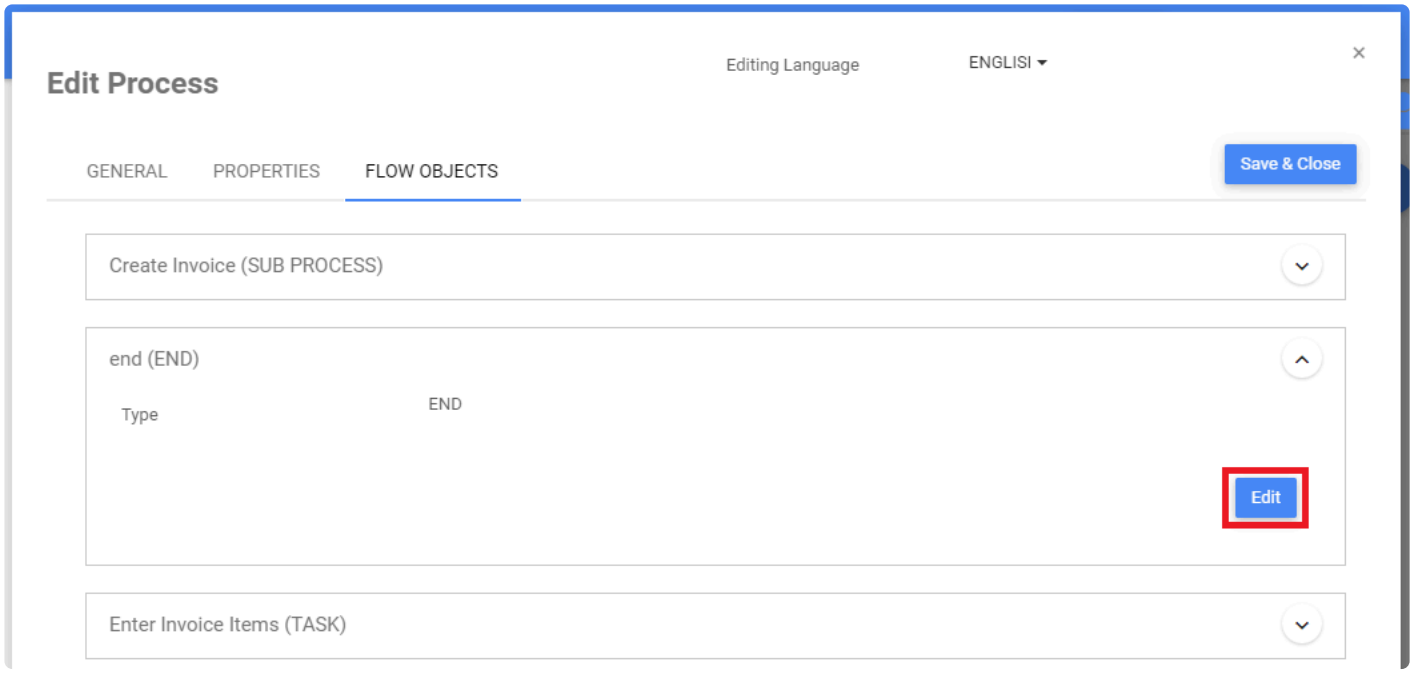
1. Click on the icon of the Flow Object you want to edit. In this example, a task



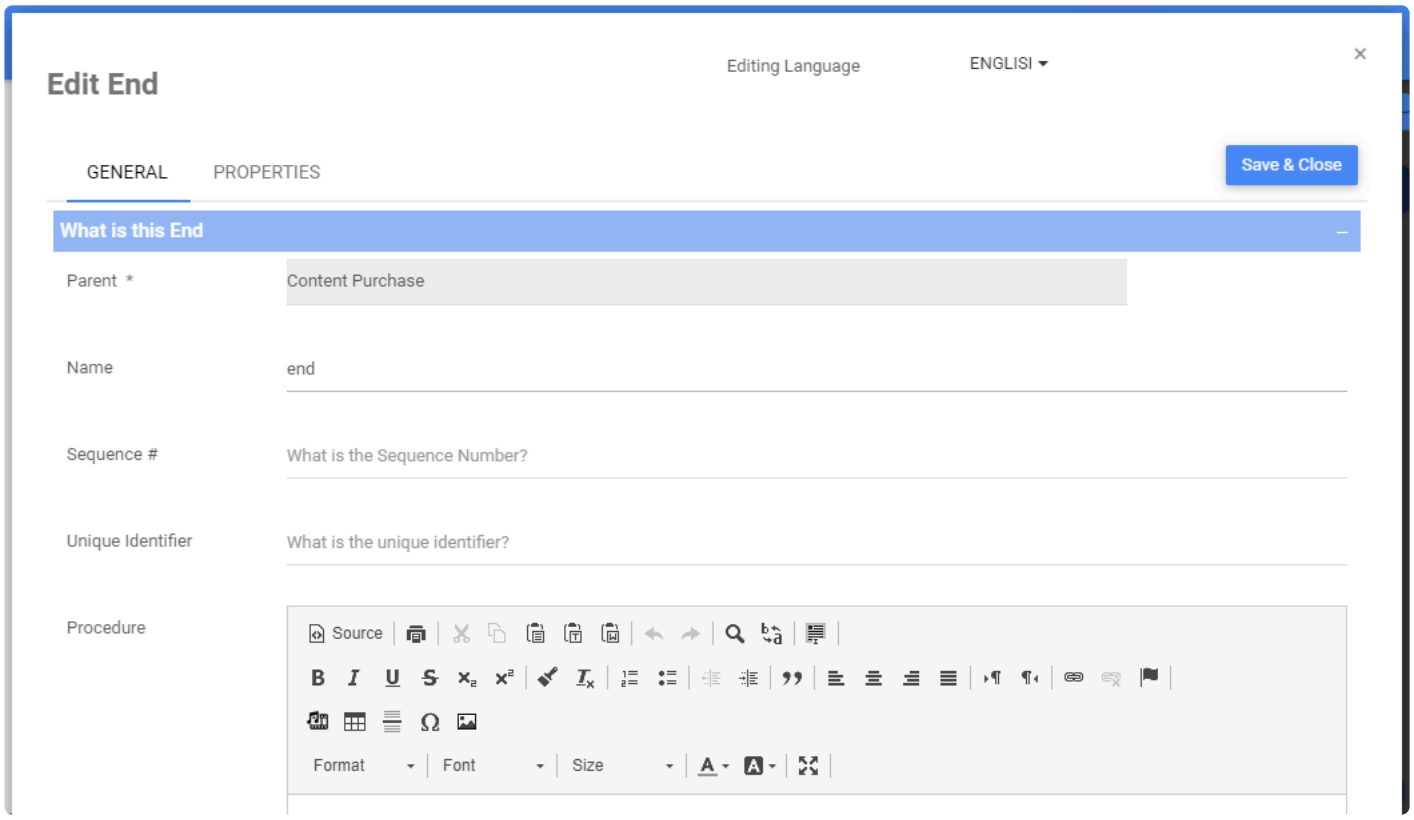
2. The box of the Flow Object will be expanded



3. Click on the Edit box to edit the Task



4. You will be redirected to the Edit General Details tab of the Flow Object



Navigate to the Edit Flow Object General Details and Edit Process Objects Properties Details to find instructions on how to edit Flow Object details

12.2.3.3.1 Edit Flow Object General Details

The General tab contains a section for the basic information about the Flow Object, as well as the Responsibilities and Associations sections.

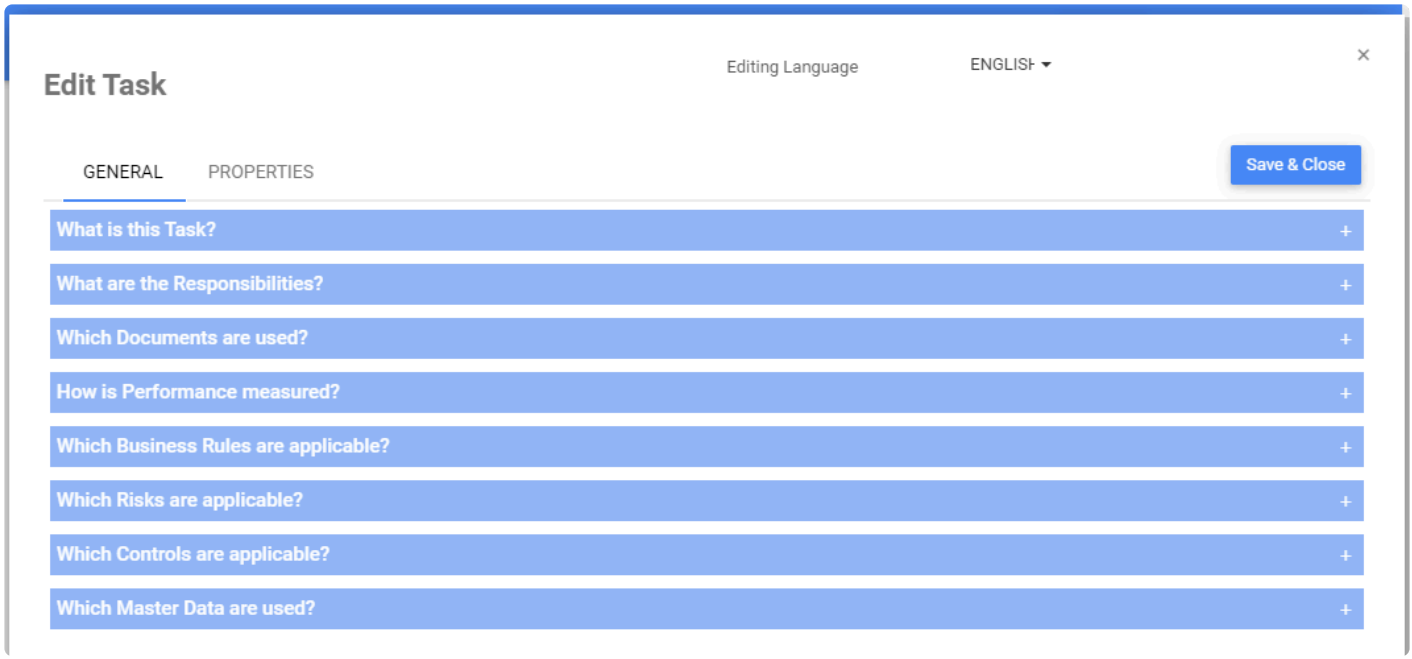
Web Modelers can access the Edit Details window for a Flow Object through:

1. The Edit button on the Flow Object's Details tab
2. The Flow Object tab of a Process Edit Details window
3. The Edit Details box when editing a process map on Graph Edit Mode

Flow Objects that can be edited:

- Task
- Gateways
- Events

Example of "Edit Task"



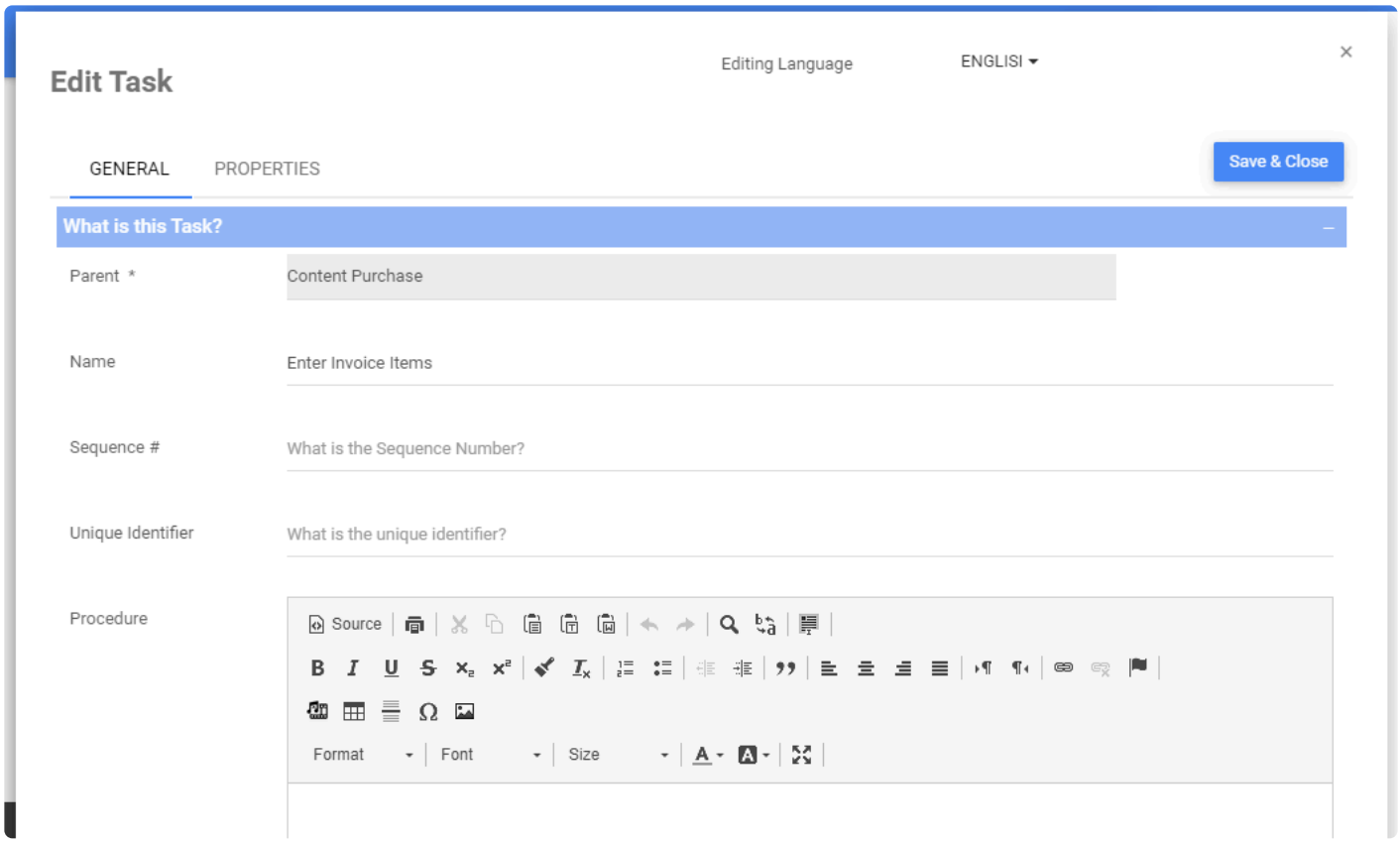
What is this [Flow Object]?

This table below describes the fields of this section.

Field	Description
Parent Set/ Process	The Parent Process under which this Flow Object is nested.

Name	The name of the Flow Object.
Sequence #	The Sequence Number of the Flow Object. This is a numerical value and normally reflects the flow of processes and activities.
Unique Identifier	The Unique Identifier of the Flow Object. This serves to uniquely identify the Flow Object as per your company protocol.
Description	This field describes the procedures and steps of the Flow Object. The rich text format allows for text formatting, images, URLs, tables, etc.
Goal	This field describes the objective of the Flow Object. The rich text format allows for text formatting, images, URLs, tables, etc.

Example of “What is this Task?”



Responsibilities and Associations

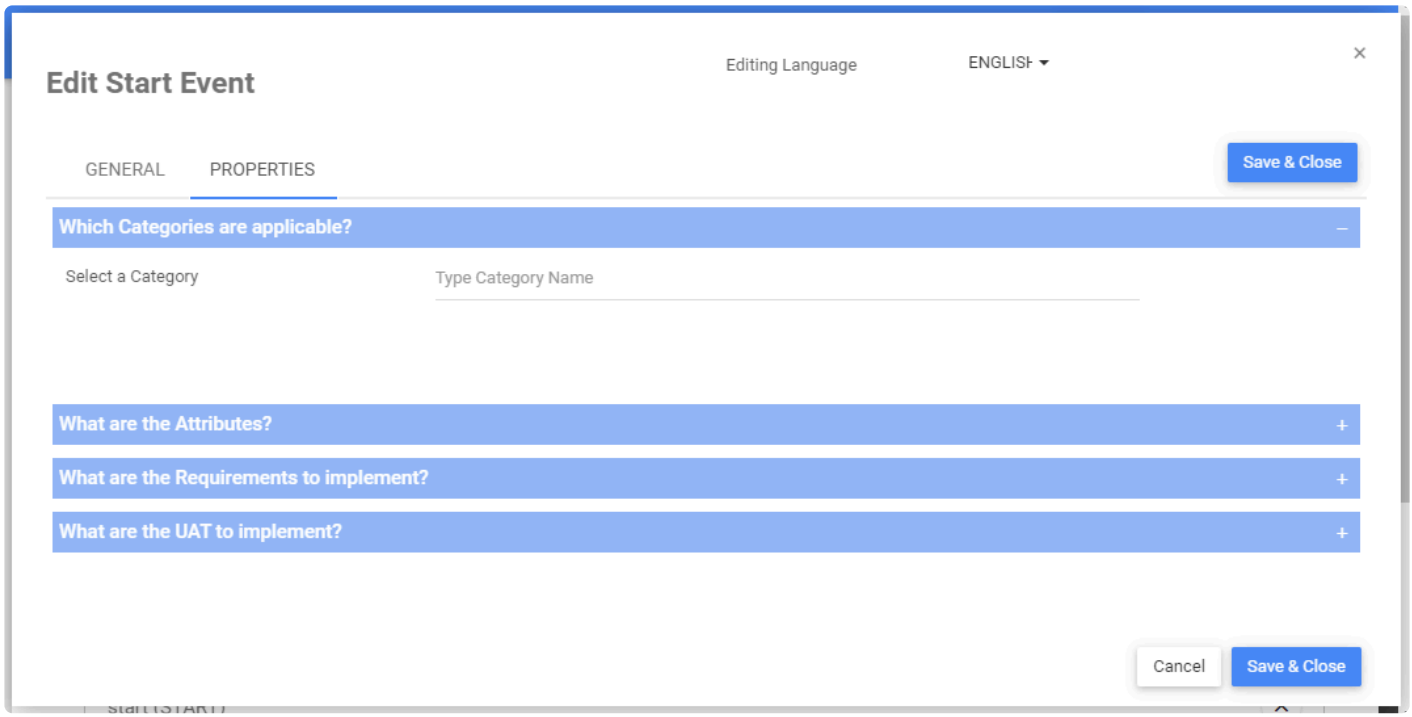
Since the Responsibilities and Associations sections are common to many EPC objects, the instructions have been centralized in the Associations section of the user manual. You can find direct links to instructions for specific sections below.

Section	Instructions

What are the Responsibilities?	Assign Responsibilities
Which Documents are used?	Associate Documents
How is Performance Measured?	Associate Performance
Which Business Rules are Applicable?	Associate Business Rules
Which Risks are Applicable?	Associate Risks
Which Controls are Applicable?	Associate Controls

12.2.3.3.2 Edit Flow Objects Properties Detail

The Properties tab for Flow Objects contains sections for the categories applicable, the attributes, the requirements to implement, and user acceptance to implement.



Properties

Since all Properties sections are common to many EPC objects, the instructions have been centralized in the Properties section of the user manual. You can find direct links to instructions for specific sections below.

Section	Instructions
Which Categories are applicable?	Object Categories
What are the Attributes?	Object Attributes

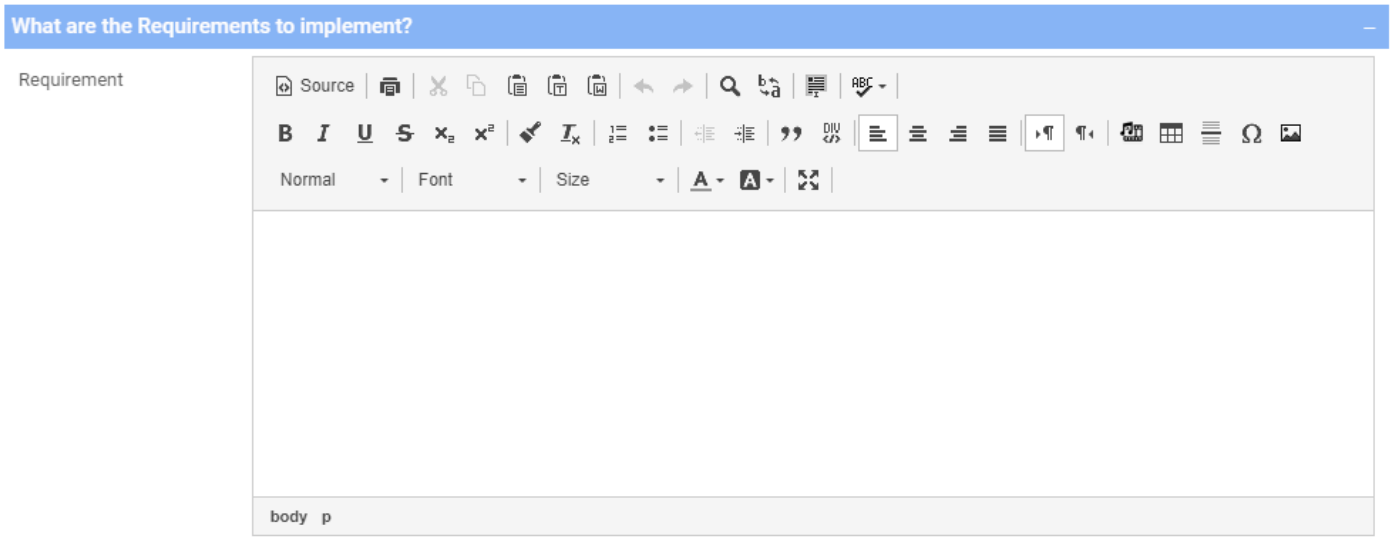
Object Requirements

The Object Requirements serves as a list of functions and rules the object is required to adhere by to ensure the Business Requirement is met.

1. Navigate to the Properties' tab of the "Details" page of a process

2. Click on What are the Requirements to implement ?

3. Type the desired Requirements in the rich text box.

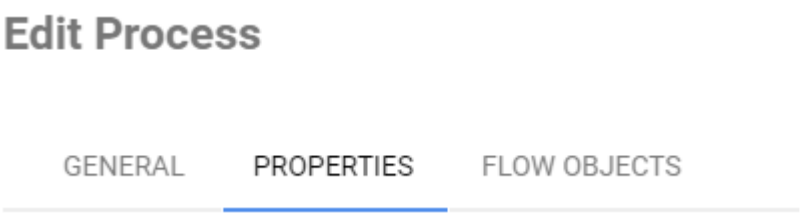


4. Click on the Save button

Object User Acceptance Test

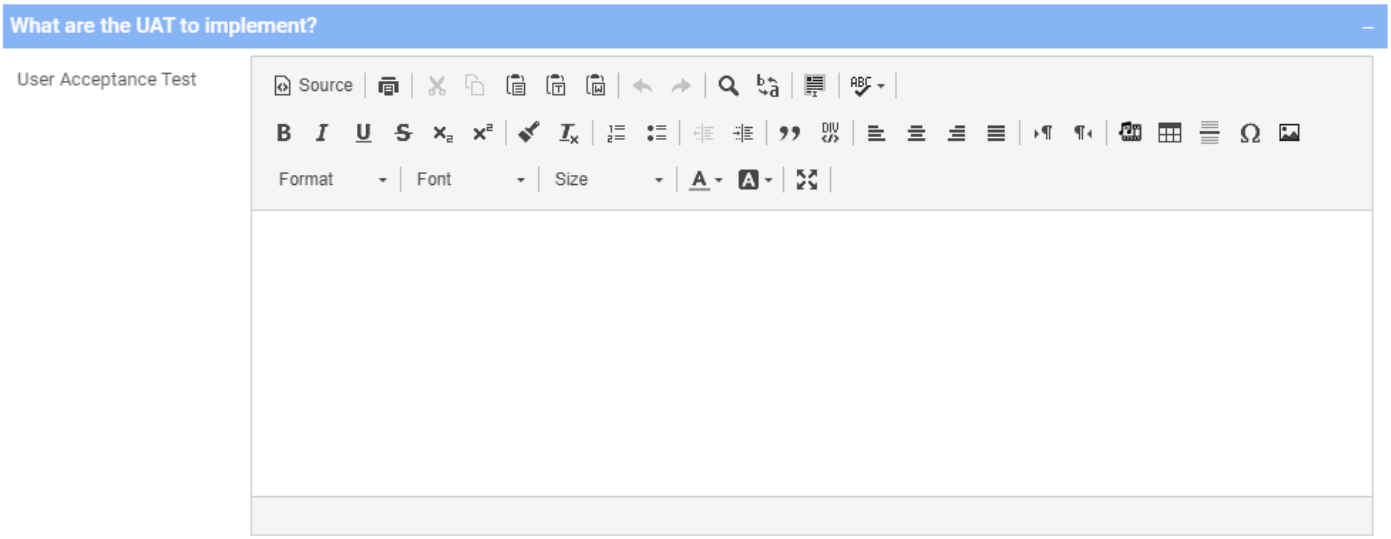
The Object User Acceptance Test serves as a check list of tests that are required to be passed to ensure the Business Requirement functions properly.

1. Navigate to the Properties' tab of the "Details" page of a process



2. Click on What are the UAT to implement?

3. Type the desired tests in the text-box.



4. Click on the Save button

12.2.4 Delete Process Objects

While Web Modelers use the Edit option to map their processes on the EPC Webapp, they can also delete the objects they no longer want. These objects can be shapes, items and flows within process maps.

> Only users given the permission to be Web Modelers and the Delete security permission will be able to use the Delete function.

> The delete object button should only be available for EPC modelers in “Show Latest”

Web Modelers can use two different options to delete process objects:

1. Delete Process Sets, Processes and Flow Objects using the Delete button, in the Details tab of the object
2. Delete Flow objects and shapes on the Full Screen Edit Mode using the Delete Key

12.2.5 Publish Process Objects

Once Web Modelers finished creating Process objects and mapping Processes, they can publish it and allow all users with rights to view the process.

To learn how to publish objects, click here

12.2.6 Process Approval Cycle

Web Modelers can set Approval Cycles on Process Objects.

To learn how to set Approval Cycles, click here

12.2.7 Process Security

Web Modelers that are System Admins, Environment Admins, have Full Control Allow permission or have Read + Write + Delete Permission can set security permissions on Process Objects.

To learn how to set security on an object, click here.

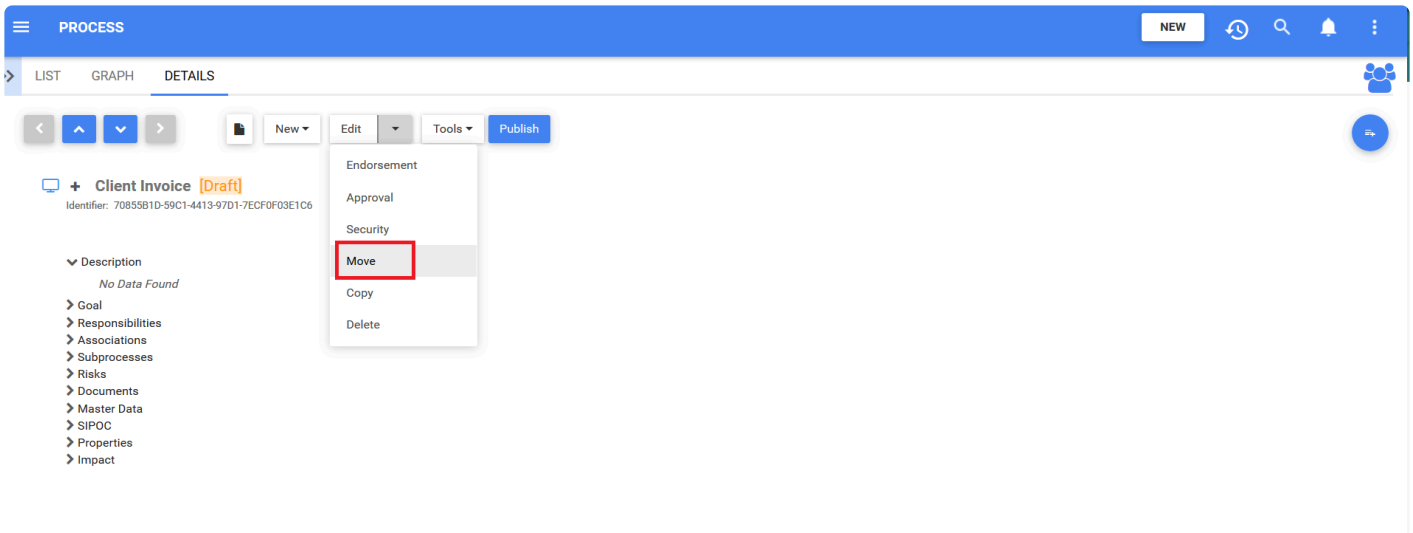
12.2.8 Move Process Objects

Users can move Processes within the Process Module, facilitating updates, changes and minimizing any unnecessary work repetition.

In Edit Mode, processes can be moved from:

1. Sub-Process to Sub-Process
2. Sub-Process to Process Set (or vice versa)
3. Process Set to Process Set

To move processes, navigate to the processes Map Graph or details page. Within the “Edit” dropdown, select “Move”.



You can find further detail on Moving Objects in the EPC here.

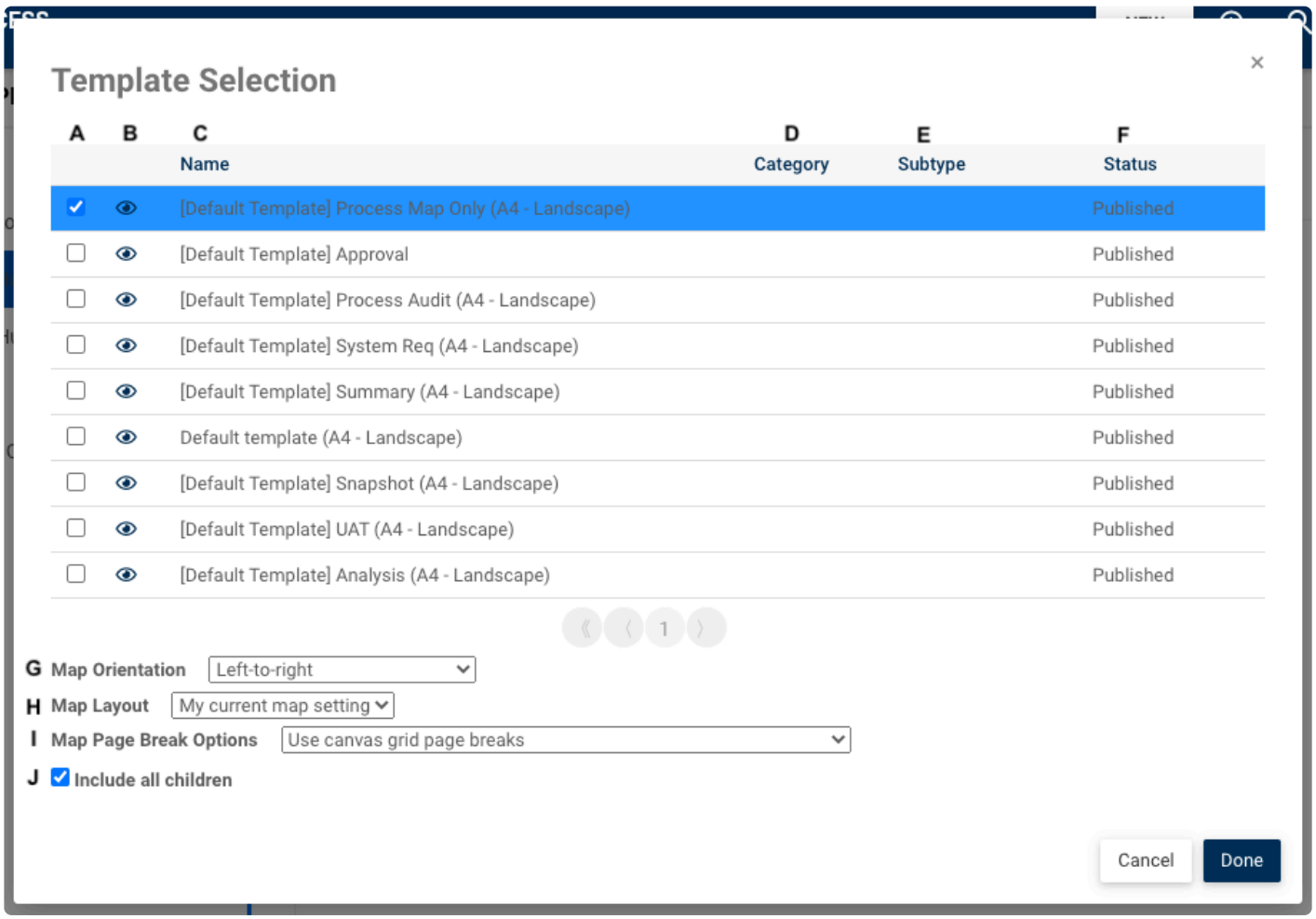
12.2.9 Generating a Process Book

After creating and uploading custom templates, users are able to generate a process book based on the template they have selected. The template will be populated based on the process the user generates the process book on. The process book will then be downloaded on your computer in a Word Document (.docx) format.

To generate a process book:

1. Navigate to a process. In the details or graph view, click on the Process Book icon located on the toolbar.

2. The template selection prompt will appear:



Letter	Column	Description
A	Checkbox	Selects the template

B	Preview	Preview the template in a pop-up view
C	Name	The name of the template
D	Category	Categories assigned to the template
E	Subtype	Types assigned to the template
F	Status	Indicates whether the template is a published or draft version
G	Auto Layout Orientation	Prints the process map using a left-to-right or top-to-bottom auto layout configuration
H	Include all children	Includes all subprocesses in a drilldown
I	Shrink to Fit in single page	Shrinks the process map to fit in 1 page
J	Saved Map Layout	Use the save map layout

3. Select the desired template and click “Done”

4. The prompt will close, and the document will be downloaded to your computer

> If the size of the process is big, there may be a delay for the download.

Include all Children

If you wish to generate a muti-level process book, select this option. The resulting output will include all sub-processes of n-levels. Given the following process:

- 2 Manufacturing
  - 2.1 Process Raw Materials
    - 2.1.4 Item Check
  - 2.2 Manufacture Product
  - 2.3 Receive Raw Materials

	Exclude Children	Include Children
Processes included	2 Manufacturing	2 Manufacturing 2.1 Process Raw Materials

		2.1.4 Item Check 2.2 Manufacture Product 2.3 Receive Raw Materials

12.2.10 Process Object Endorsement Cycle

Web Modelers can set Endorsement Cycles on Process Objects.

To learn how to set Endorsement Cycles, click here

12.3 Performance Edit

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.

Users given the permission to be Web Modelers, can create and edit Performance objects directly on the WebApp.

The Performance Edit section will cover the following:

1. Create Performance Objects
2. Edit Performance Objects
3. Delete Performance Objects
4. Publish Performance Objects
5. Performance Objects Approval Cycle
6. Performance Objects Security

12.3.1 Create Performance Objects

Web Modelers can create new Performance Objects on the Web App. These objects can be Performance Sets, Objectives, and Indicators, such as Key Performance Indicators (KPI), Key Risk Indicators (KRI) and Key Control Indicators (KCI). Web Modelers can create new Performance objects by clicking on the button NEW or directly through the Details Page of a Performance Set or Objective.

The Create Performance Objects section will cover the following:

1. Create a Performance Set
2. Create an Objective
3. Create an Indicator

12.3.1.1 Create a Performance Set

Performance sets link and store all company objectives and indicators within the organization's database.

Web Modelers can create new Performance Sets on the WebApp.

To Create a New Performance Set, please follow the Create Sets instructions.

12.3.1.2 Create an Objective

An Objective is a textual definition of what needs to be achieved in the company. Objectives can be flexibly defined as anything from company-wide mission statements to more granular, low-level objectives.

In the context of EPC, Objectives can be under a Performance Sets, or under another Objectives as a sub-objective. All indicators (KPIs, KRIs and KCIs) are found within Objectives.

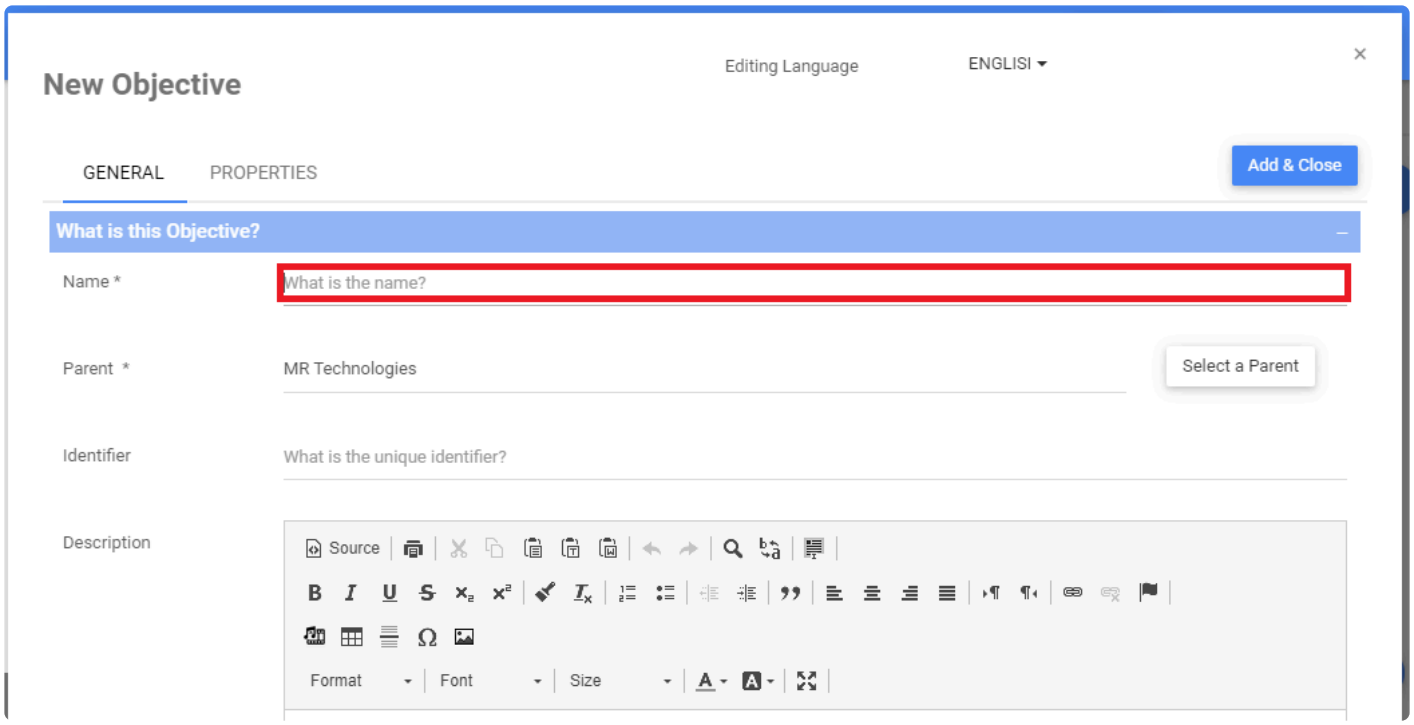
For instructions on how to create a new Objective, see the Create Objects section.

Filling out a New Objective form

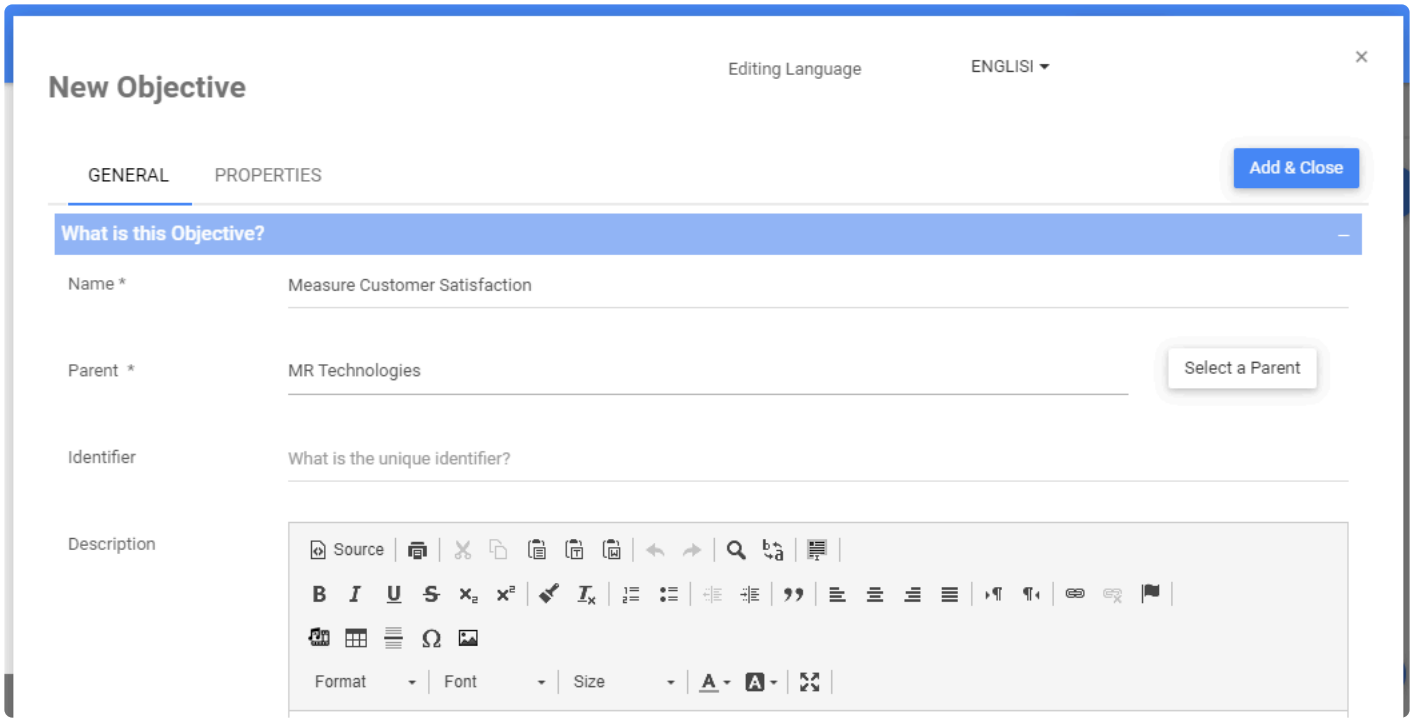
Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

1. Type the name of the Objective on the “What is the name?” field

It is **mandatory** for Web Modelers to input a name for the Indicator



For this example, the name of the Objective is “Measure Customer Satisfaction”

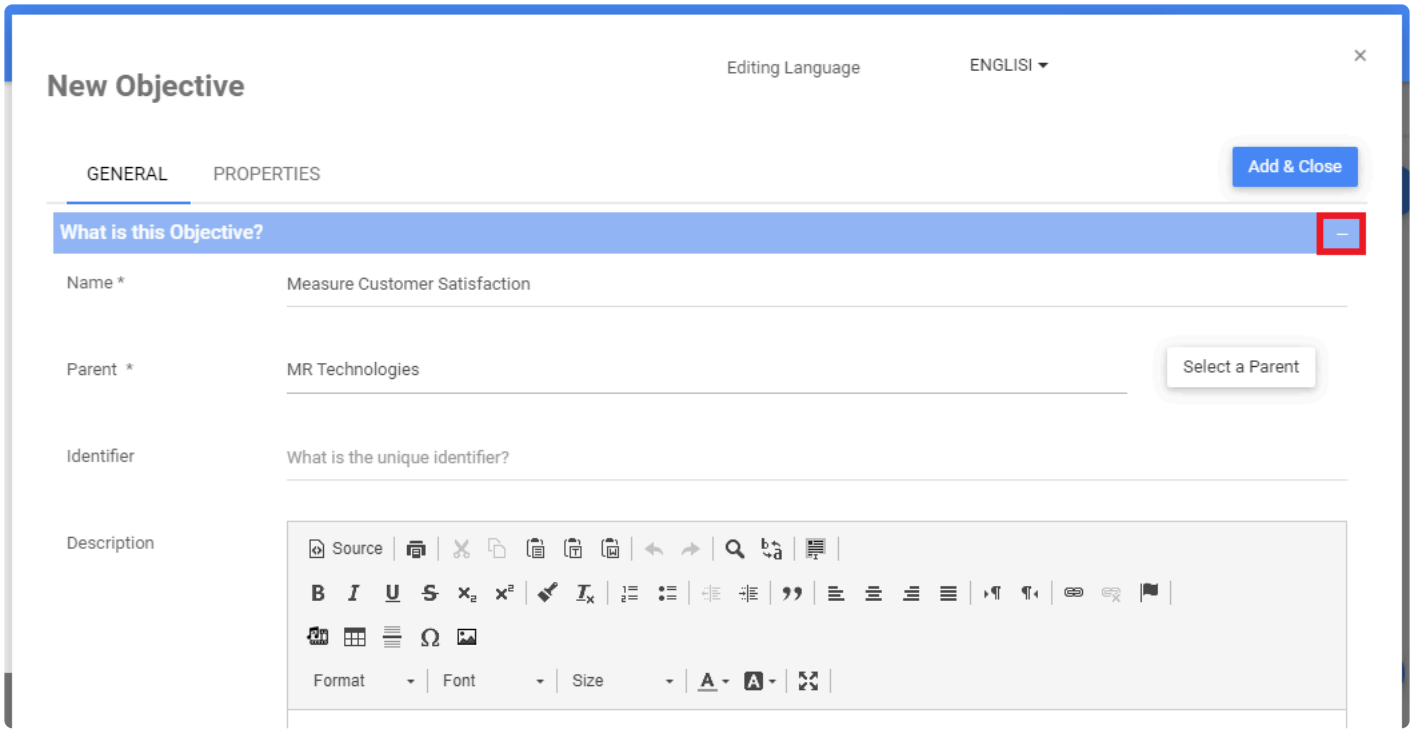


> The EPC automatically assigns the Set or Objective as the Parent, which is the set or objective you selected. The Parent field is blocked and cannot be edited.

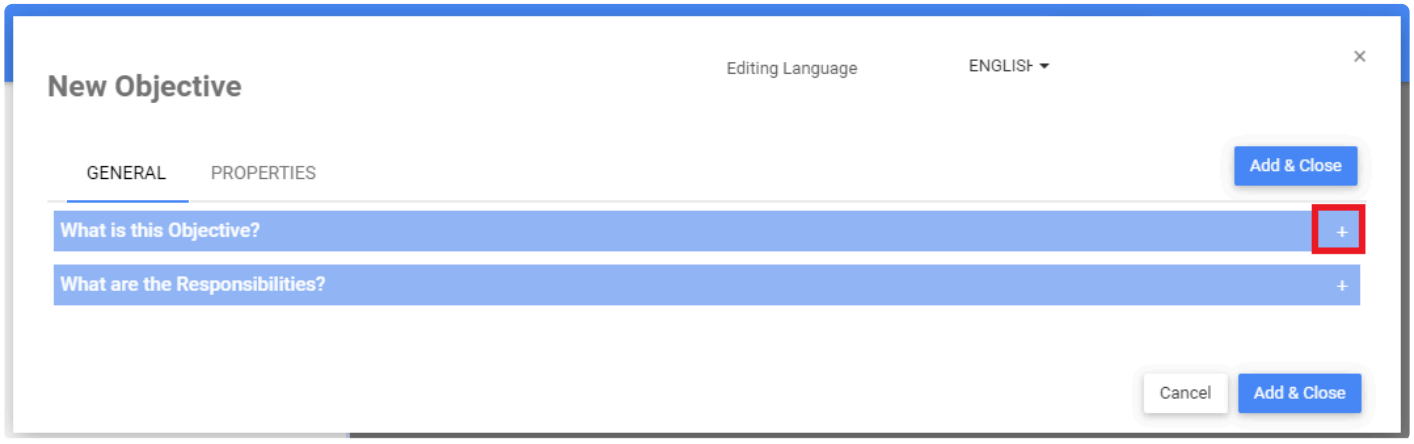
2. Use the + and − icons to expand and hide the different sections within each tab of the New Objective Window. Input the right information about the Objective in each section.

> The new Objective window has two tabs, General and Properties. Under each tab there are different sections where the Web Modeler can input detailed information about the Indicator. To learn more about about each section and how to input information, click here

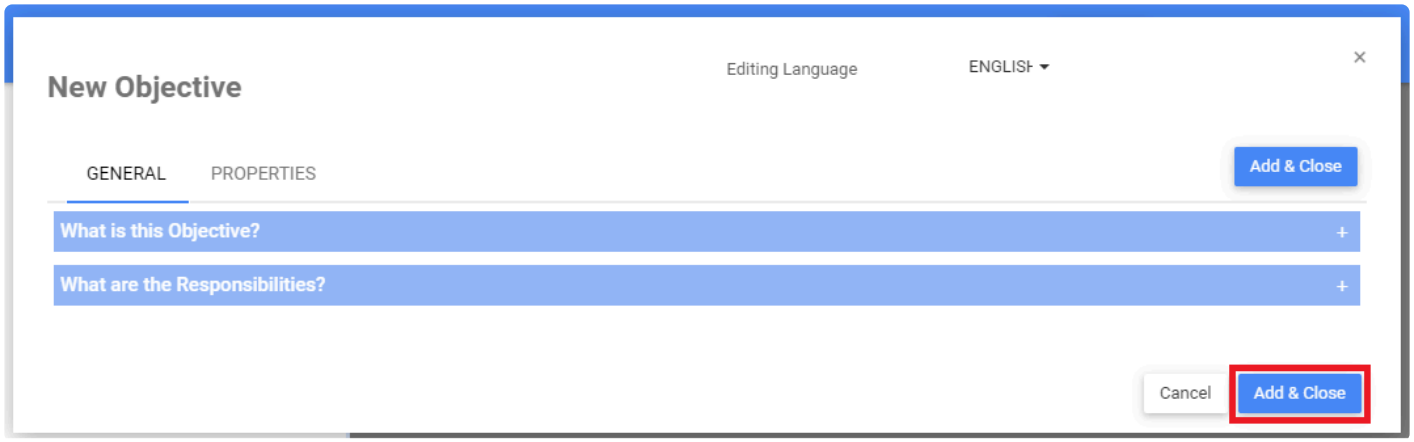
i) To hide sections, click on the − icon:



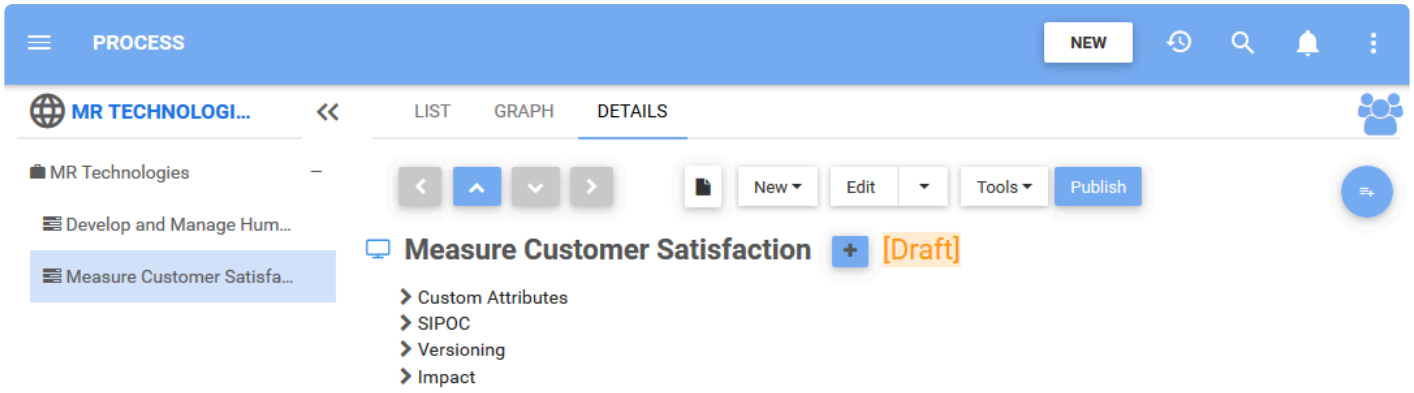
ii) To expand sections, click on the + icon:



3. Click on the button Add & Close to create the Objective



4. The new Objective “Measure Customer Satisfaction” is under the Performance set. This Objective is currently a draft. To learn how to publish Performance objects, click here



12.3.1.3 Create an Indicator

The different types of Indicators are:

Abbreviation	Indicator	Definition
KPI	Key Performance Indicator	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.
KRI	Key Risk Indicator	An indicator which is used by organizations to help define its risk profile and monitor changes in that profile.
KCI	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.

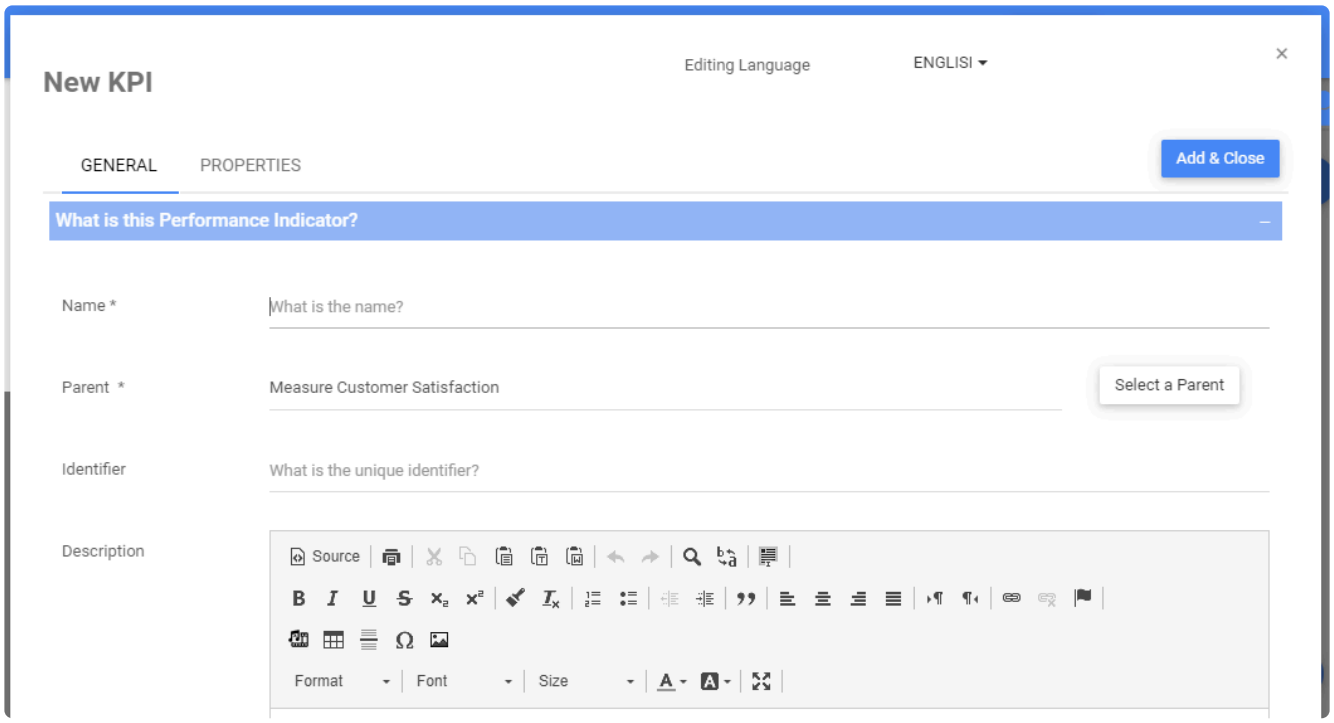
Web Modelers can create Indicators on the WebApp and organize them within Objectives.

For instructions on how to create a new Indicator, see the Create Objects section.

Filling out a New Indicator form

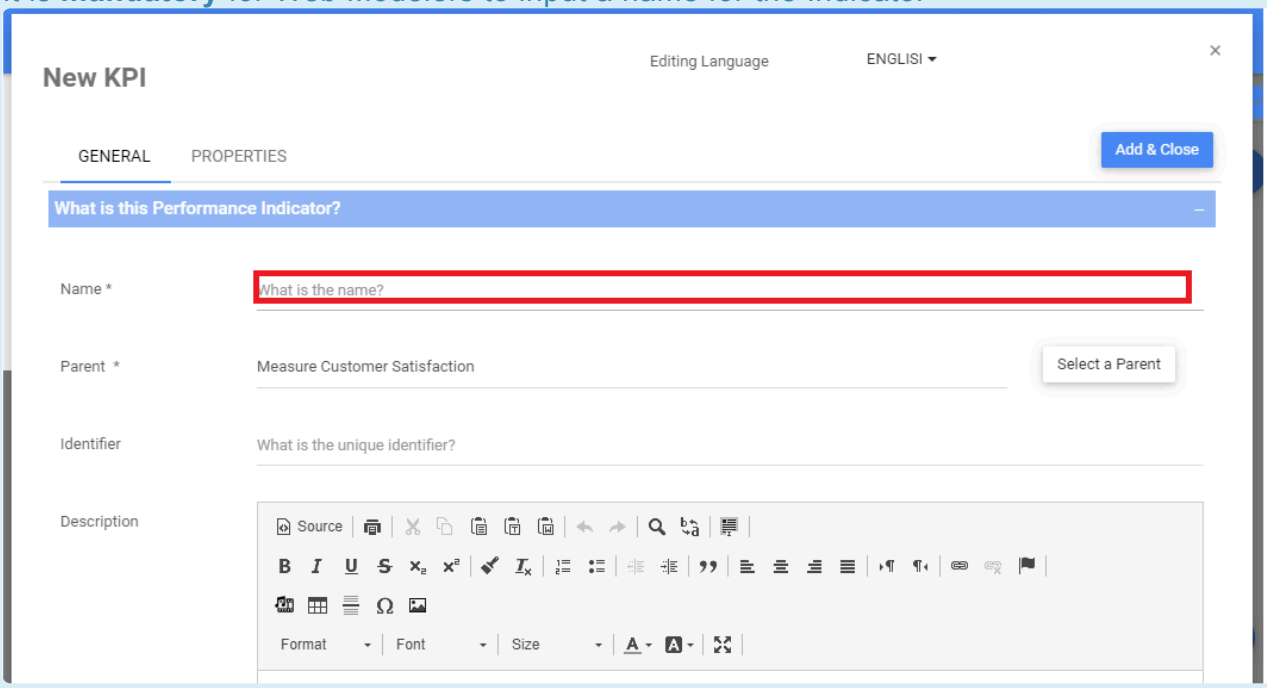
Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

1. Click on New KPI

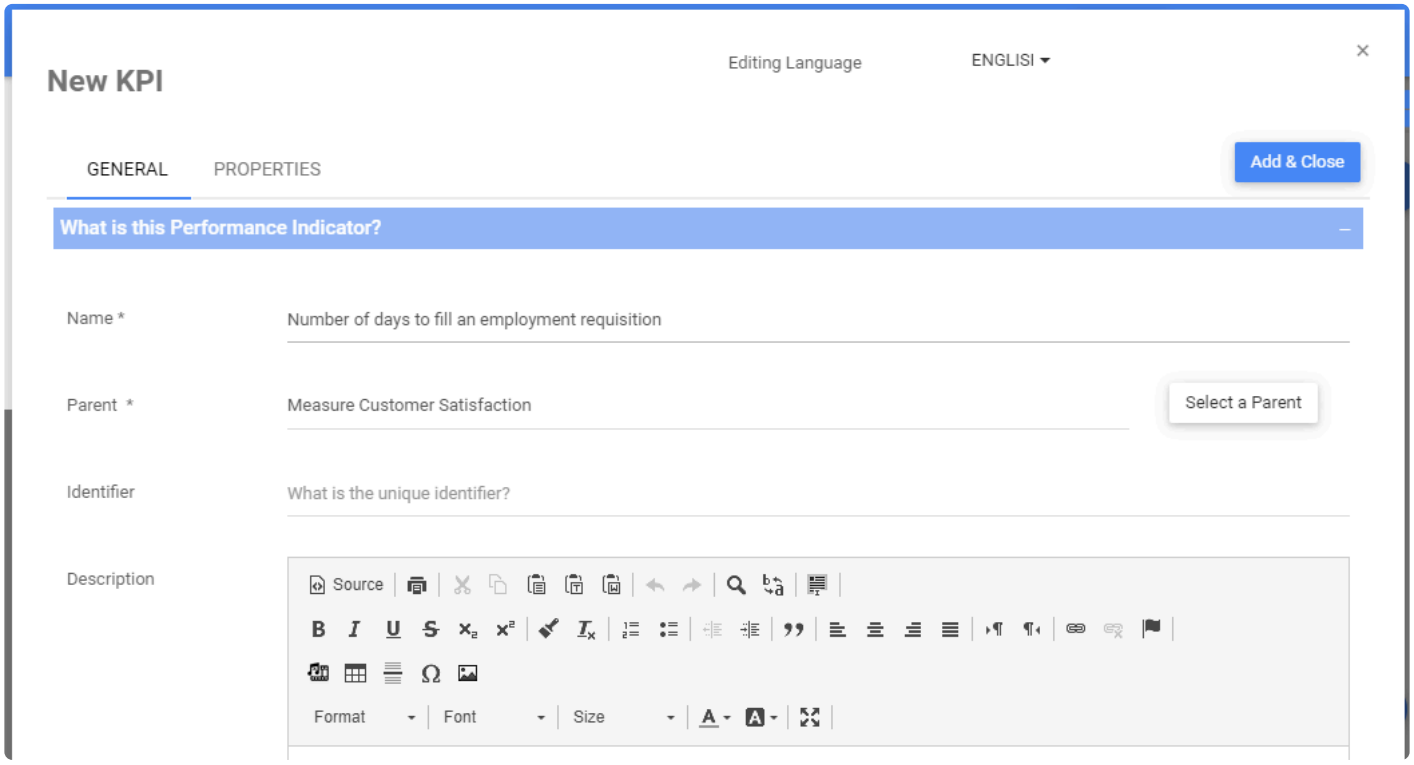


2. Type the name of the Indicator on the “What is the name?” field

It is **mandatory** for Web Modelers to input a name for the Indicator



For this example, the name of the Indicator is “Number of days to fill an employment requisition”

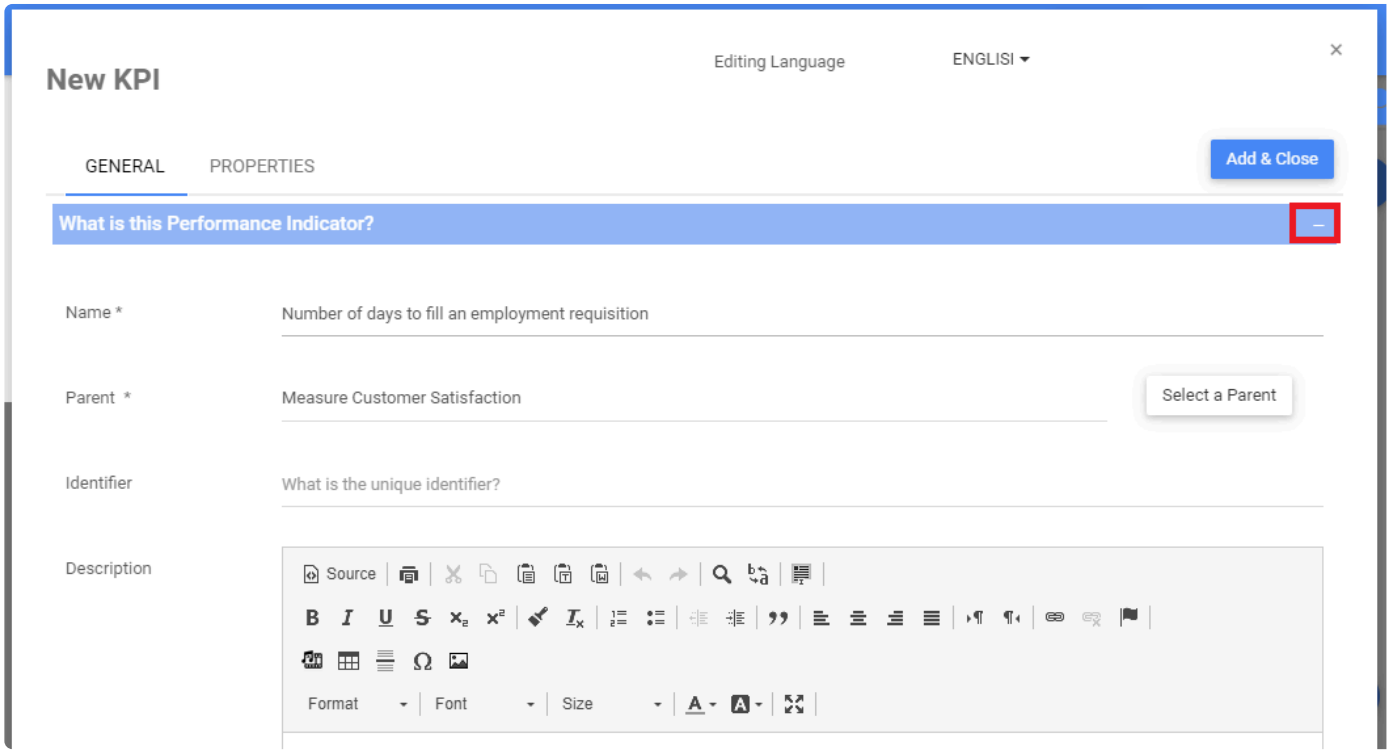


p(banner tip). The EPC automatically assigns the Objective as the Parent, which is the objective or sub-objective you selected. The Parent field is blocked and cannot be edited.

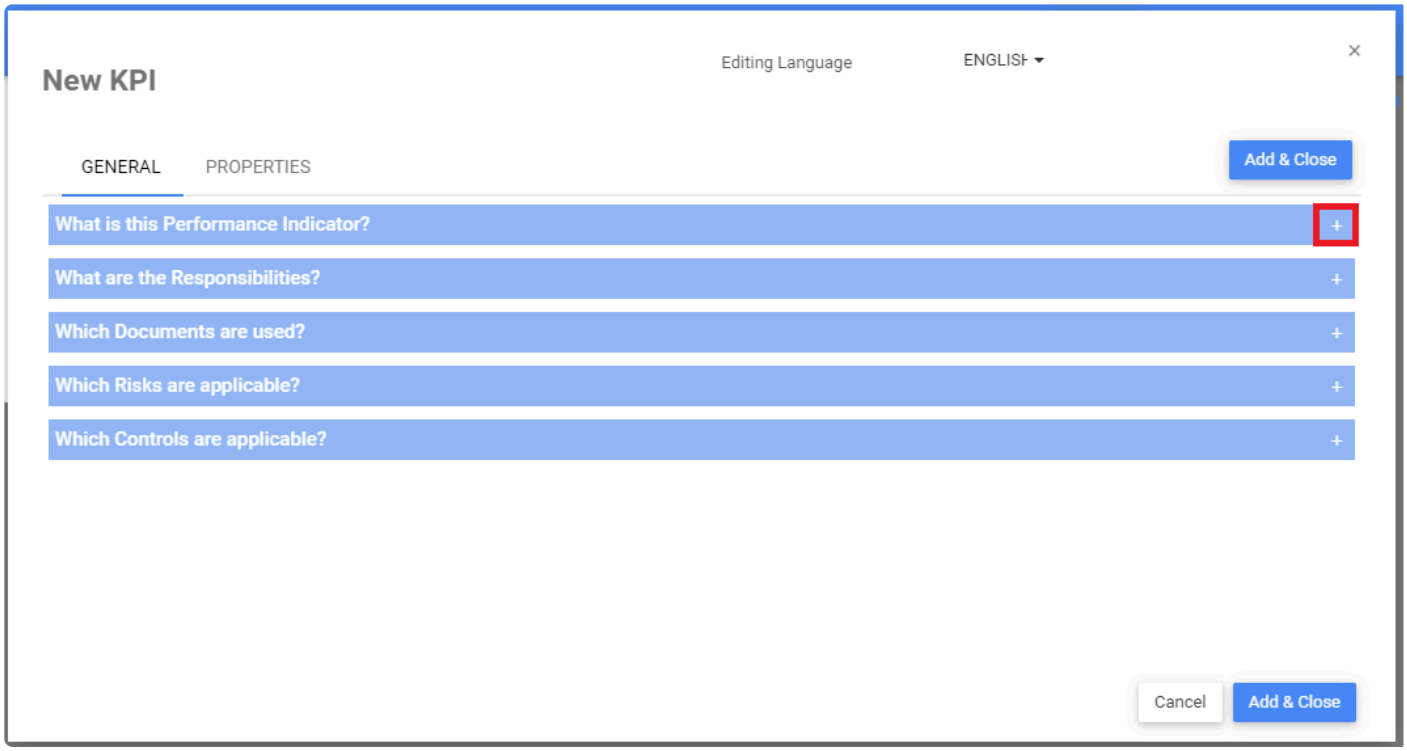
3. Use the + and − icons to expand and hide the different sections within each tab of the New Indicator Window. Input the right information about the Indicator in each section.

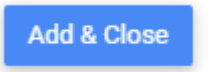
> The new Indicator window has two tabs, General and Properties. Under each tab there are different sections where the Web Modeler can input detailed information about the Indicator. To learn more about about each section and how to input information, click here

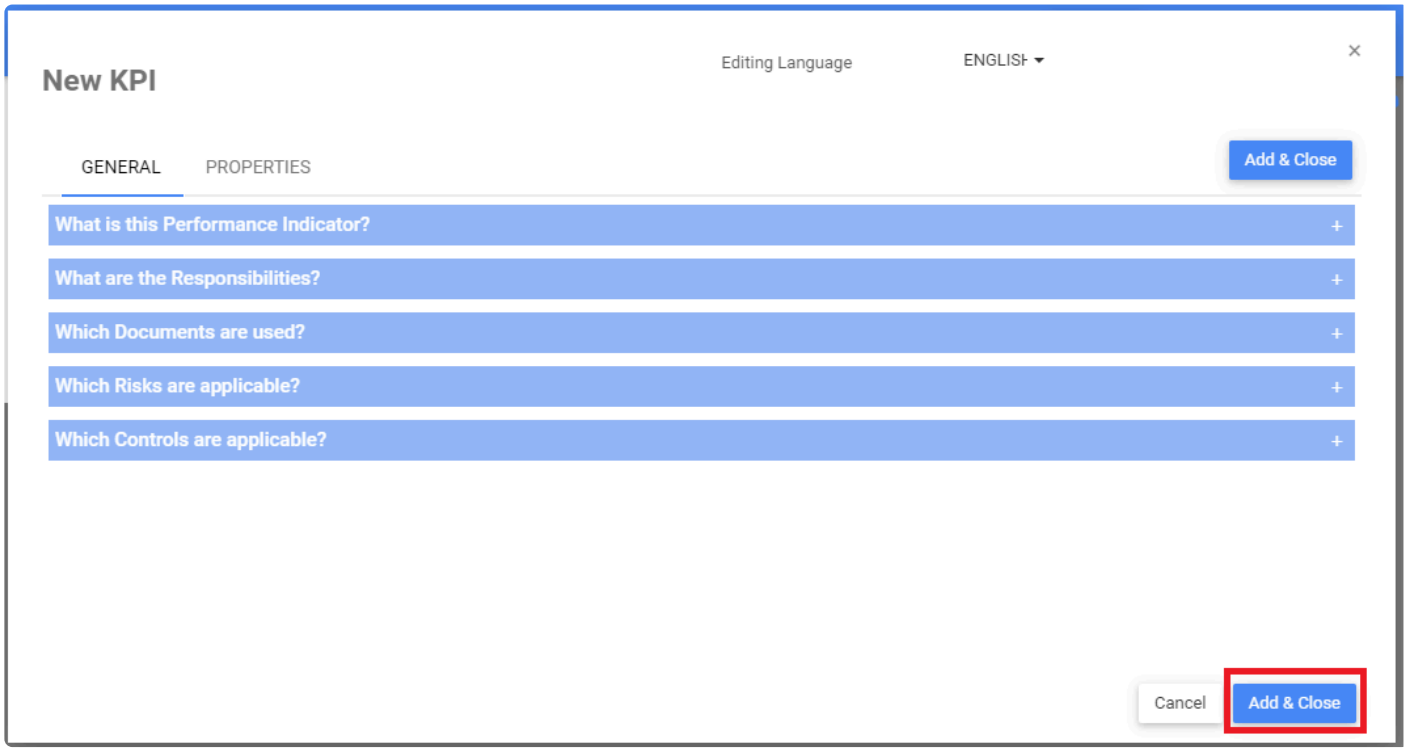
i) To hide sections, click on the − icon:



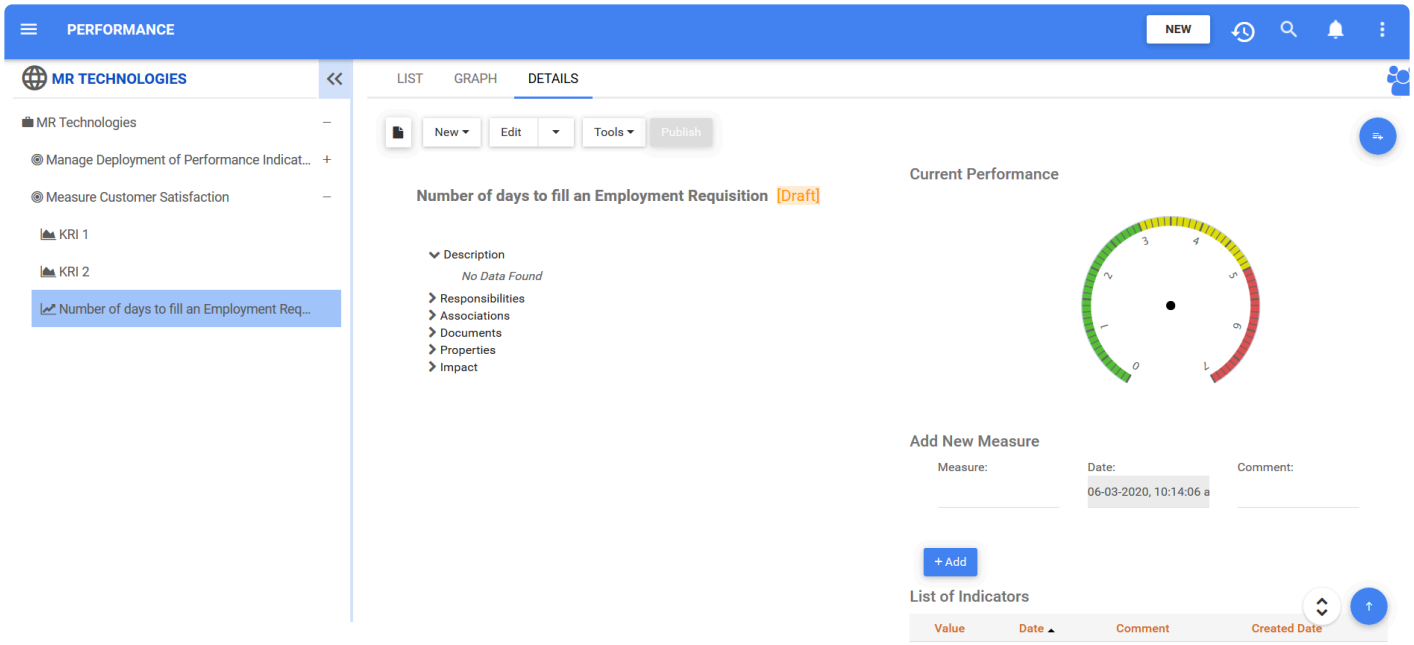
ii) To expand sections, click on the + icon:



4. Click on the button  to create the Indicator



5. The new KPI “Number of days to fill an employment requisition” is now inside of the “Manage deployment of personnel” Objective. This KPI is currently a draft. To learn how to publish Performance objects, click here


PERFORMANCE
NEW
MR TECHNOLOGIES
MR Technologies
Manage Deployment of Performance Indicat...
Measure Customer Satisfaction
KRI 1
KRI 2
Number of days to fill an Employment Req...
LIST
GRAPH
DETAILS
New
Edit
Tools
Publish
Number of days to fill an Employment Requisition [Draft]
Description
No Data Found
Responsibilities
Associations
Documents
Properties
Impact
Current Performance
Add New Measure
Measure:
Date:
06-03-2020, 10:14:06 a
Comment:
+ Add
List of Indicators
Value
Date
Comment
Created Date

12.3.2 Edit Performance Objects

Web Modelers can edit the Details of Performance Objects. They need to navigate to the Edit button of the object to access the Edit Details window. The Edit Details window has two tabs, General and Properties. Under each tab there are different sections where the Web Modeler can input detailed information about the Performance object.

Web Modelers can choose the editing language in the Edit Details window.

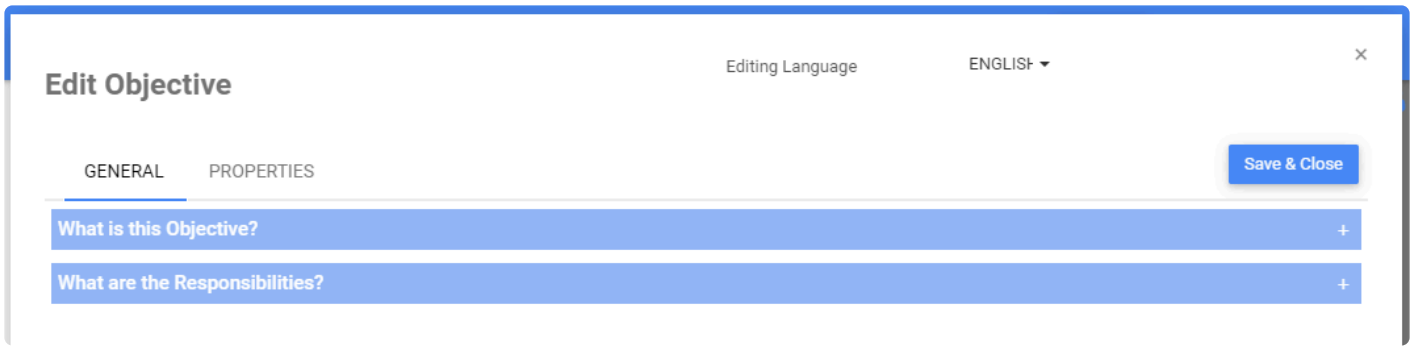
Only users with the Web Modeler Permission will be able to see the Edit Button on the toolbar; the displayed content needs to be set to Show Latest, and the editing tool is the Web.

This section will cover the following:

1. Edit Objective General Details
2. Edit Performance Indicator General Details
3. Edit Performance Objects Properties Details

12.3.2.1 Edit Objective General Details

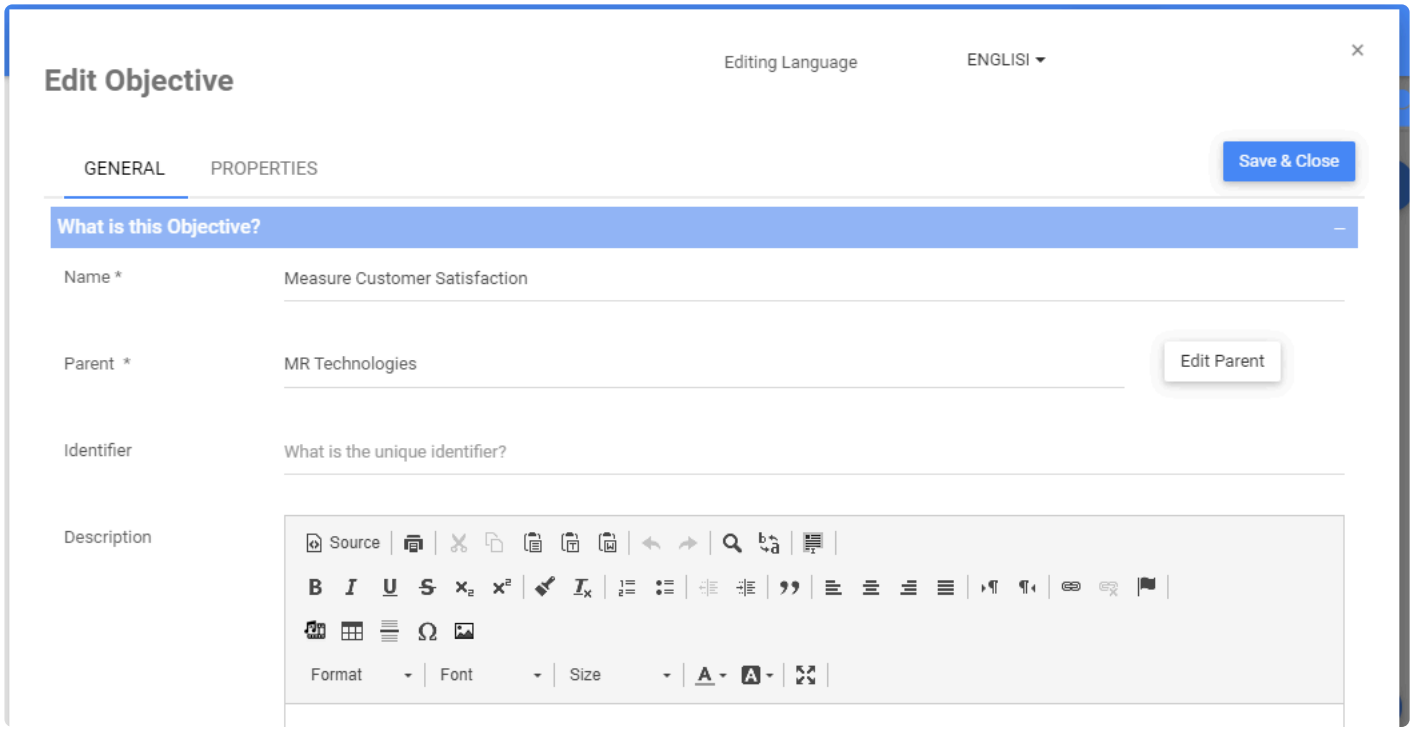
The General tab contains the basic information about the Objective as well as the Responsibilities and Associations sections.



What is this Objective?

This table below describes the fields of this section.

Field	Description
Name	The name of this Performance Indicator. The name should summarize what is being measured. A name is **mandatory** for all objects.
Parent Performance Set or Objective	The Performance Set or Objective under which this Objective is nested.
Identifier	The Unique Identifier of this Objective. This serves to uniquely identify the Objective as per your company protocol.
Description	This field describes the indicator in detail. The rich text format allows for text formatting, images, URLs, tables, etc.



h2. Responsibilities

Since the Responsibilities and Associations sections are common to many EPC objects, the instructions have been centralized in the Associations section of the user manual. You can find direct links to instructions for specific sections below.

Section	Instructions
What are the Responsibilities?	Assign Responsibilities

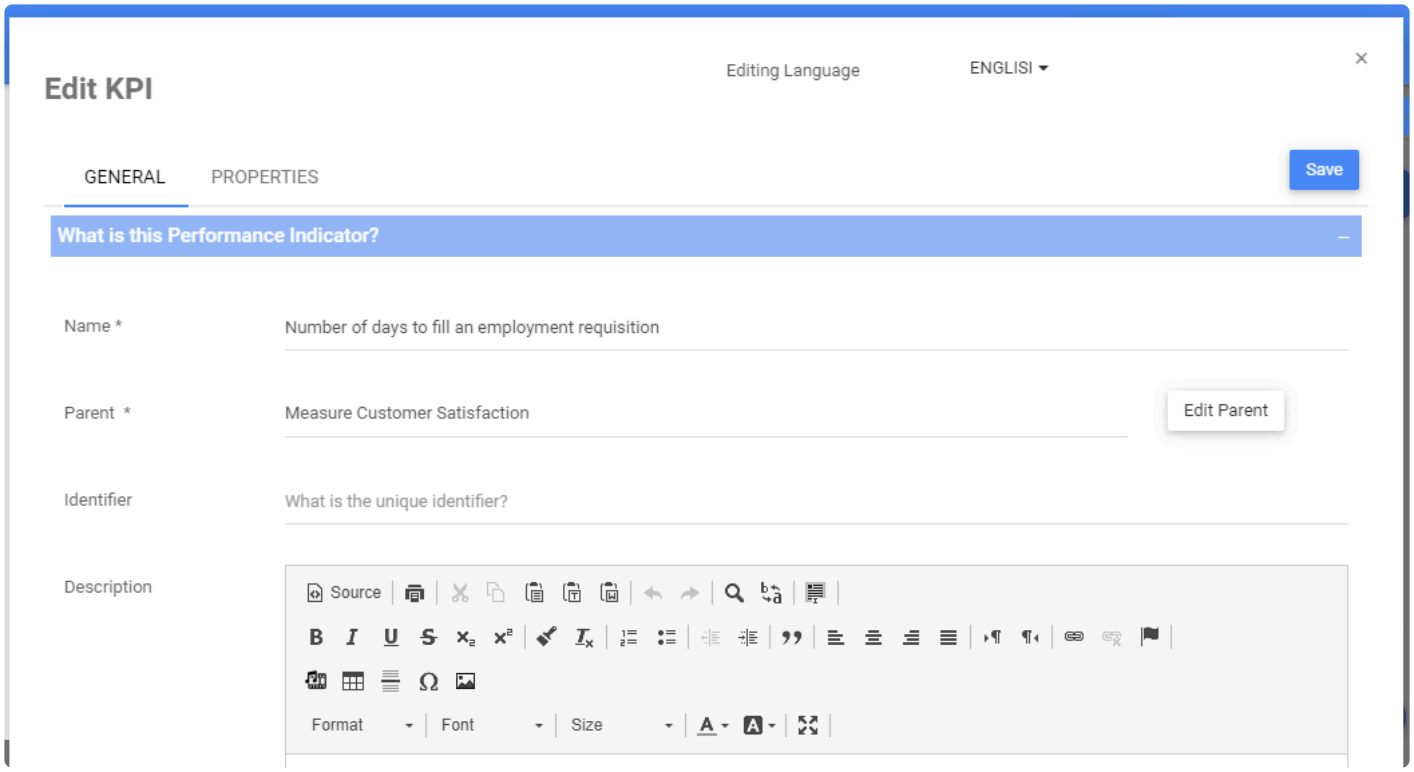
12.3.2.2 Edit Performance Indicator General Details

The General tab contains a section for the basic information about the Performance indicator, where the performance threshold can be assigned, as well as the Responsibilities and Associations sections.

What is this Performance Indicator?

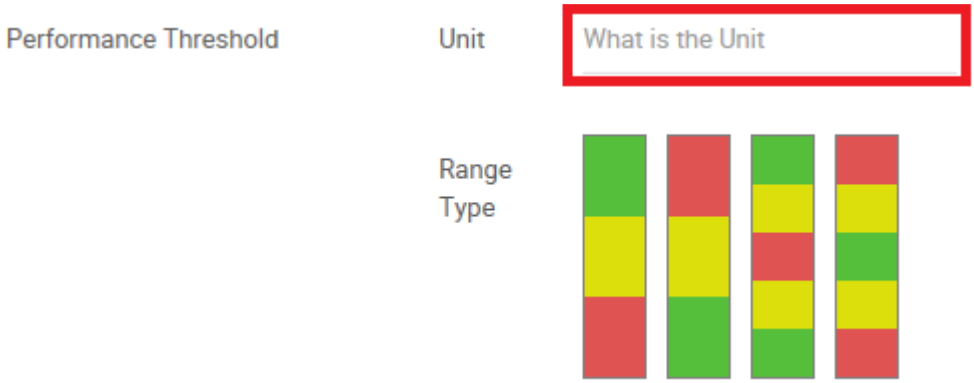
This table below describes the fields of this section.

Field	Description
Object Type	Use the drop-down menu to select the **Type** of Performance Indicator: KCI, KPI, or KRI. This cannot be edited after the first save.
Name	The name of this Performance Indicator. The name should summarize what is being measured. A name is **mandatory** for all objects.
Parent Objective	The Objective under which this Indicator is nested.
Identifier	The Unique Identifier of this Performance Indicator. This serves to uniquely identify the Indicator as per your company protocol.
Description	This field describes the indicator in detail. The rich text format allows for text formatting, images, URLs, tables, etc.
Performance Threshold	You can build custom threshold ranges for this Indicator and define the Unit of measure. See below for detailed instructions.

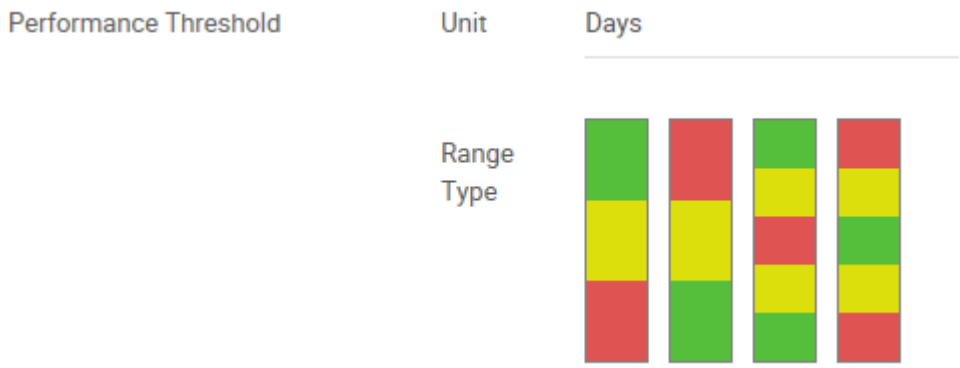


Performance Threshold

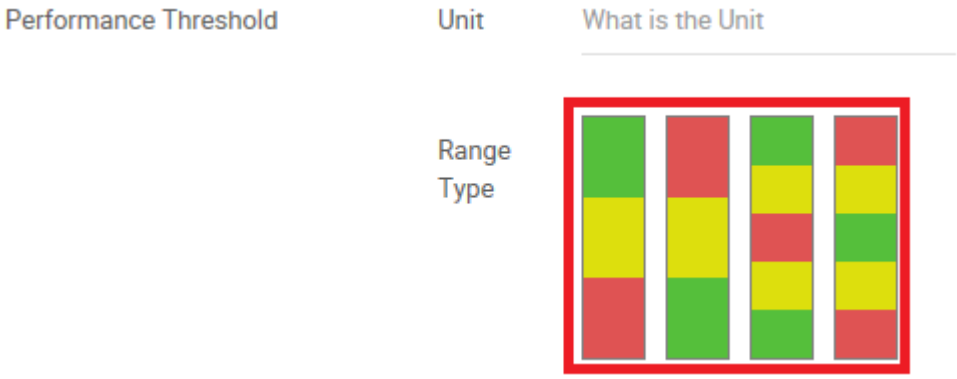
1. Input the Unit for the Performance Indicator on the “What is the Unit” box.



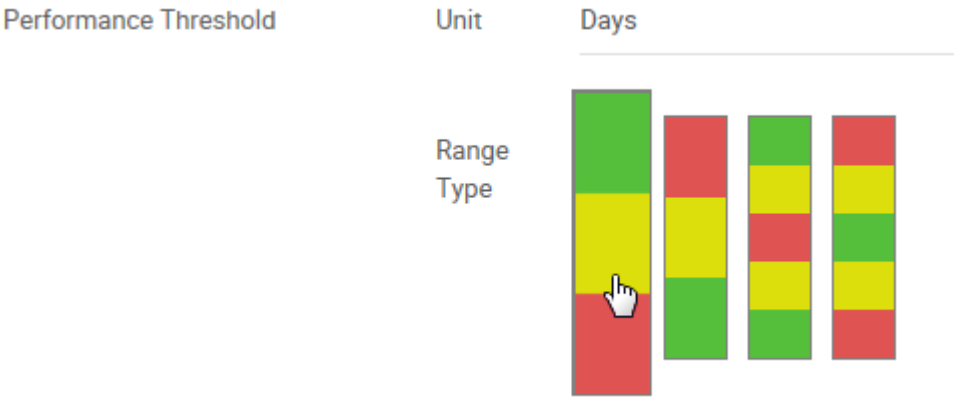
2. In this example, the unit is days



3. Choose the Range Type



4. In this example, click on the first range type



5. Assign the range numerical values in the two boxes

6. In this example, the maximum range is 15 days and the minimum range is 5 days

Responsibilities and Associations

Since the Responsibilities and Associations sections are common to many EPC objects, the instructions have been centralized in the Associations section of the user manual. You can find direct links to instructions for specific sections below.

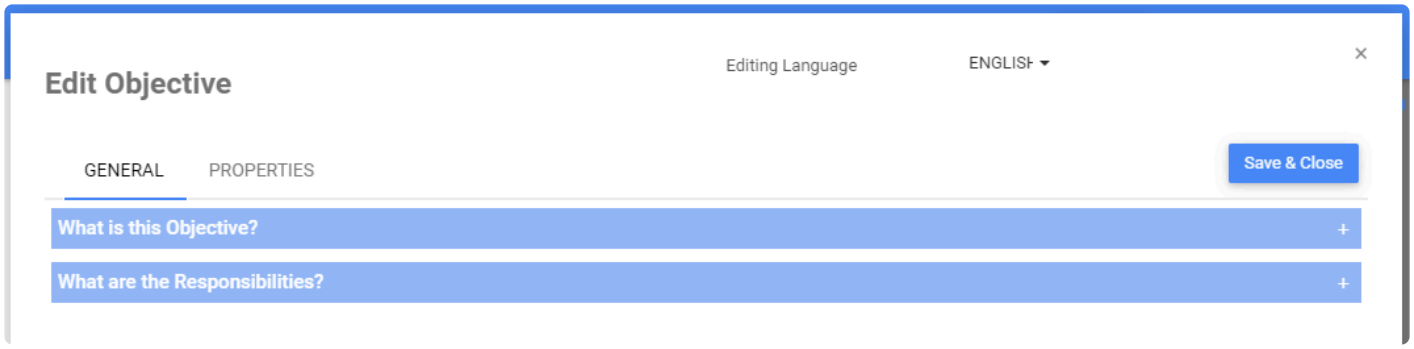
Section	Instructions
What are the Responsibilities?	Assign Responsibilities
Which Documents are used?	Associate Documents
Which Risks are applicable?	Associate Risks
Which Controls are applicable?	Associate Controls

12.3.2.3 Edit Performance Objects Properties Details

The Properties tab contains sections for the type, the categories applicable and the attributes.

The Properties tab is available for the following Performance Objects:

- Objectives
- Performance Indicators



Since the Properties sections are common to many EPC objects, the instructions have been centralized in the Properties section of the user manual. You can find direct links to instructions for specific sections below.

Section	Instructions
What type of [Object] is this?	Object Type
Which Categories are applicable?	Object Categories
What are the Attributes?	Object Attributes

12.3.3 Delete Performance Objects

Web Modelers can Delete Performance Objects if they have Delete security permission.

To learn how delete objects, click here

12.3.4 Publish Performance Objects

Once Web Modelers finished creating Performance Objects, they can publish it and allow all users with rights to view the objects.

To learn how to publish objects, click here

12.3.5 Performance Objects Approval Cycle

Web Modelers can set Approval Cycles on Performance Objects.

To learn how to set Approval Cycles, click here

12.3.6 Performance Objects Security

Web Modelers that are System Admins, Environment Admins, have Full Control Allow permission or have Read + Write + Delete Permission can set security permissions on Performance Objects.

To learn how to set security on an object, click here.

12.3.7 Move Performance Objects

Users can move Objectives and Performance Indicators (KPI, KRI, KCI) within the Performance Module

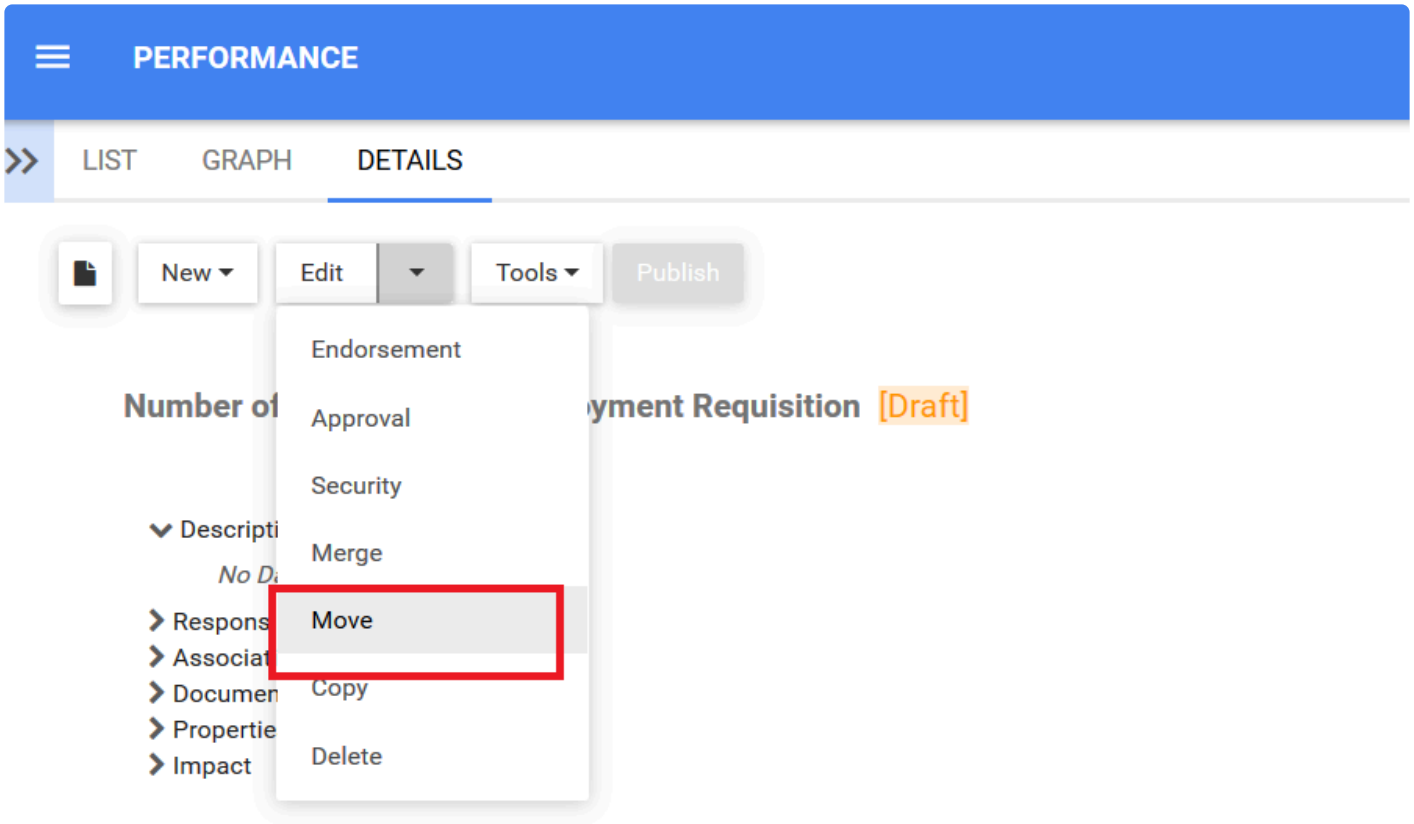
In Edit Mode, Objectives can be moved from

1. Objective to Objective
2. Objective to Performance Set (and Vice Versa)
3. Performance Set to Performance Set

Performance Indicators can be moved from

1. Objective to Objective
2. Objective to Performance Indicator (and Vice Versa)
3. Performance Indicator to Performance Indicator

To move Performance Objects, navigate to the item's details page. Within the "Edit" dropdown, select "Move".



You can find further detail on Moving Objects in the EPC here.

12.3.8 Merge Performance Objects

Users can merge similar objects in the EPC, allowing you to combine multiple objects into one. This action will allow you to remove duplicate items while maintaining their content and relationships in the application.

This capability is typically used in some of the following scenarios:

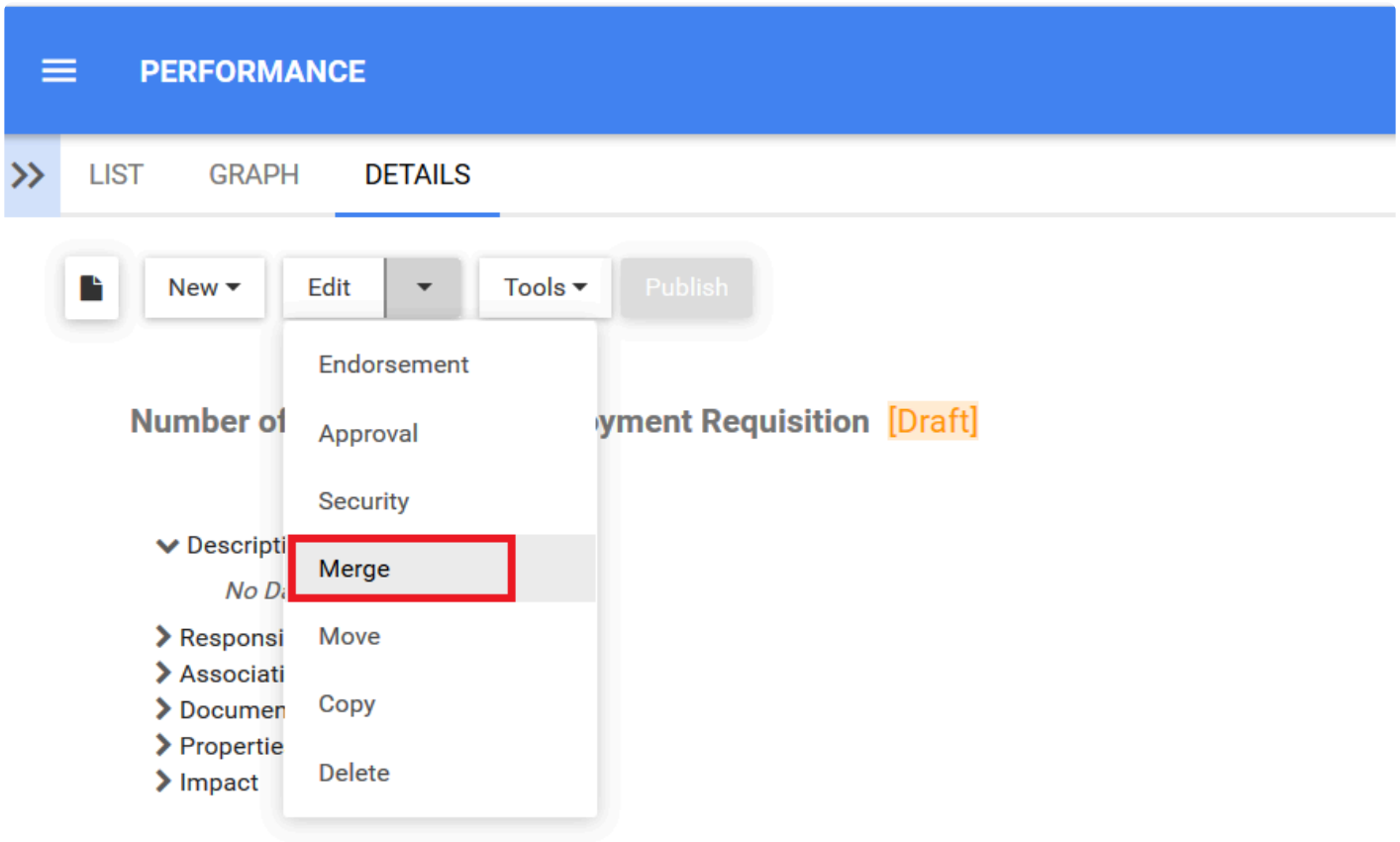
1. Remove duplicated items
2. Consolidate similar items
3. Adjust EPC content based on corporate restructurings and item re-definition

Within the Performance Module users can

1. Merge Objectives
2. Merge KPIs
3. Merge KRIs
4. Merge KCIs

> Please note that you can only Merge identical objects (i.e. KPIs can be merged with other KPIs, Objectives can be merged with other Objectives)

Users can find this feature on the details page of items. For further instructions on how to use our **Merge** feature, please see the work instructions here.


PERFORMANCE
LIST
GRAPH
DETAILS
New
Edit
Tools
Publish
Endorsement
Approval
Security
Merge
Move
Copy
Delete
Number of
yment Requisition
[Draft]
Descripti
No D
Responsi
Associati
Documen
Propertie
Impact

12.3.9 Generate Performance Books

Your EPC now features object book generation, allowing you to leverage your EPC to dynamically create object specific reports and documents. After your editors have created and uploaded [document templates](#) you can now uses these templates for the following modules:

These reports can be generated at:

a) The object level – allowing you to create reports about a specific object

b) The folder, process or org unit level – allowing you to create reports about objects INCLUDING there child objects

c) The Set level – allowing you to create large, summary documents including their child objects

For more information on how to generate object books, click [here](#)

12.3.10 Performance Object Endorsement Cycle

Web Modelers can set Endorsement Cycles on Performance Object Endorsement Cycle.
To learn how to set Endorsement Cycles, click here

12.4 Organization Edit

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.

Users given the permission to be Web Modelers, can create and edit Organization objects directly on the WebApp.

The Organization Edit section will cover the following:

1. Create Organization Objects
2. Edit Organization Objects
3. Delete Organization Objects
4. Publish Organization Objects
5. Organization Objects Approval Cycle
6. Organization Objects Security

12.4.1 Create Organization Objects

Web Modelers can create new Organization Objects on the Web App. These objects can be Organization Unit Sets, Organization Units, Roles, Resources, and Assets. Web Modelers can create new Organization objects by clicking on the NEW button or directly through the Details Page of an Organization Unit Set or an Organization Unit.

The Create Organization Objects section will cover the following:

1. Create an Organization Unit Set
2. Create an Organization Unit
3. Create a Role
4. Creating an Asset
5. Import users

12.4.1.1 Create an Organization Unit Set

Organization Unit Sets are containers that hold all organization's objects. The best practice is to have one large organization set for the entire enterprise, and separate sets for the different types of external entities. Web Modelers can are responsible to create Organization Unit Sets on the Web App, and organize the hierarchical structure of the enterprise.

To Create a New Organization Unit Set, please follow the Create Sets instructions.

12.4.1.2 Create an Organization Unit

Organization Units represent the various branches and departments within the enterprise. Divisions within departments can be reflected by creating organization units within higher level organization units. In the context of EPC, Organization Units can be under a set, or under another units as a sub-unit. There can be many levels of Units, each with objects within.These objects can be roles, resources and assets.

Organization Units contains all the roles, resources, and assets that are used within the unit. Web Modelers arrange Organization Units in a manner that is the most appropriate to the organization's hierarchical structure.

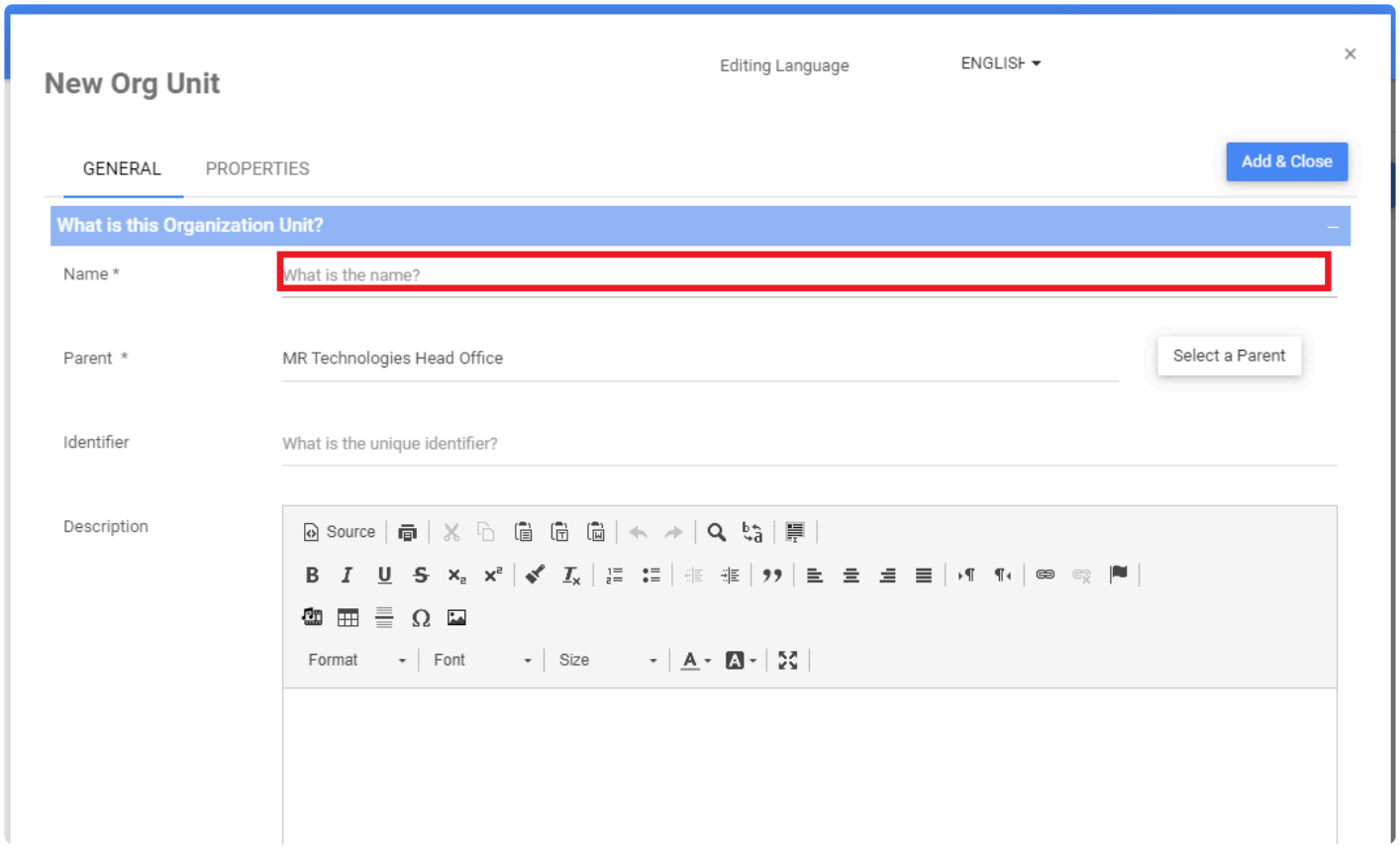
For instructions on how to create a new object, see the Create Objects section.

Filling out a New Organization Unit form

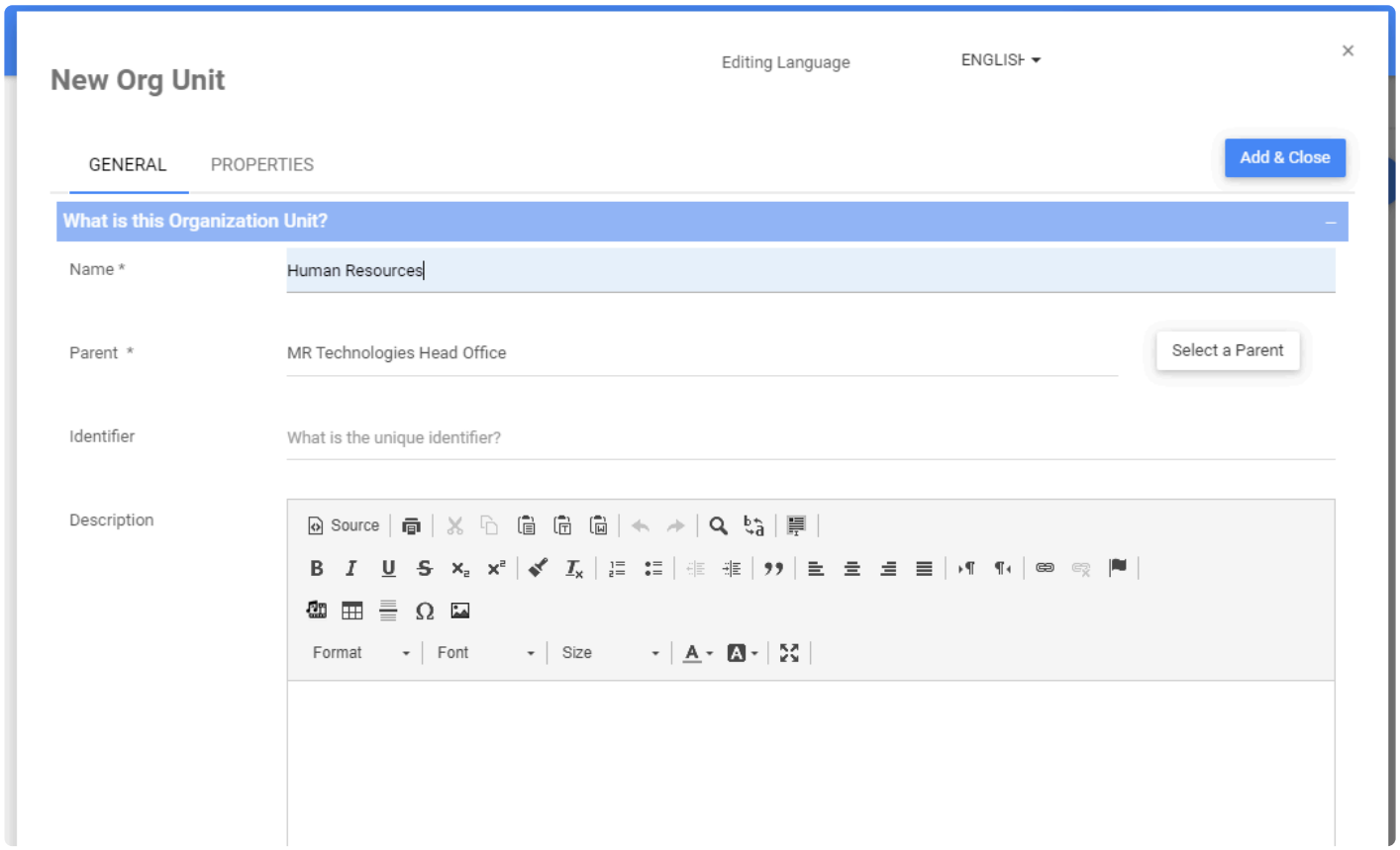
Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

1. Type the name of the Organization Unit on the "What is the name?" field

The Name field is **mandatory** for all objects.



For this example, the name of the Organization Unit is “Human Resources”

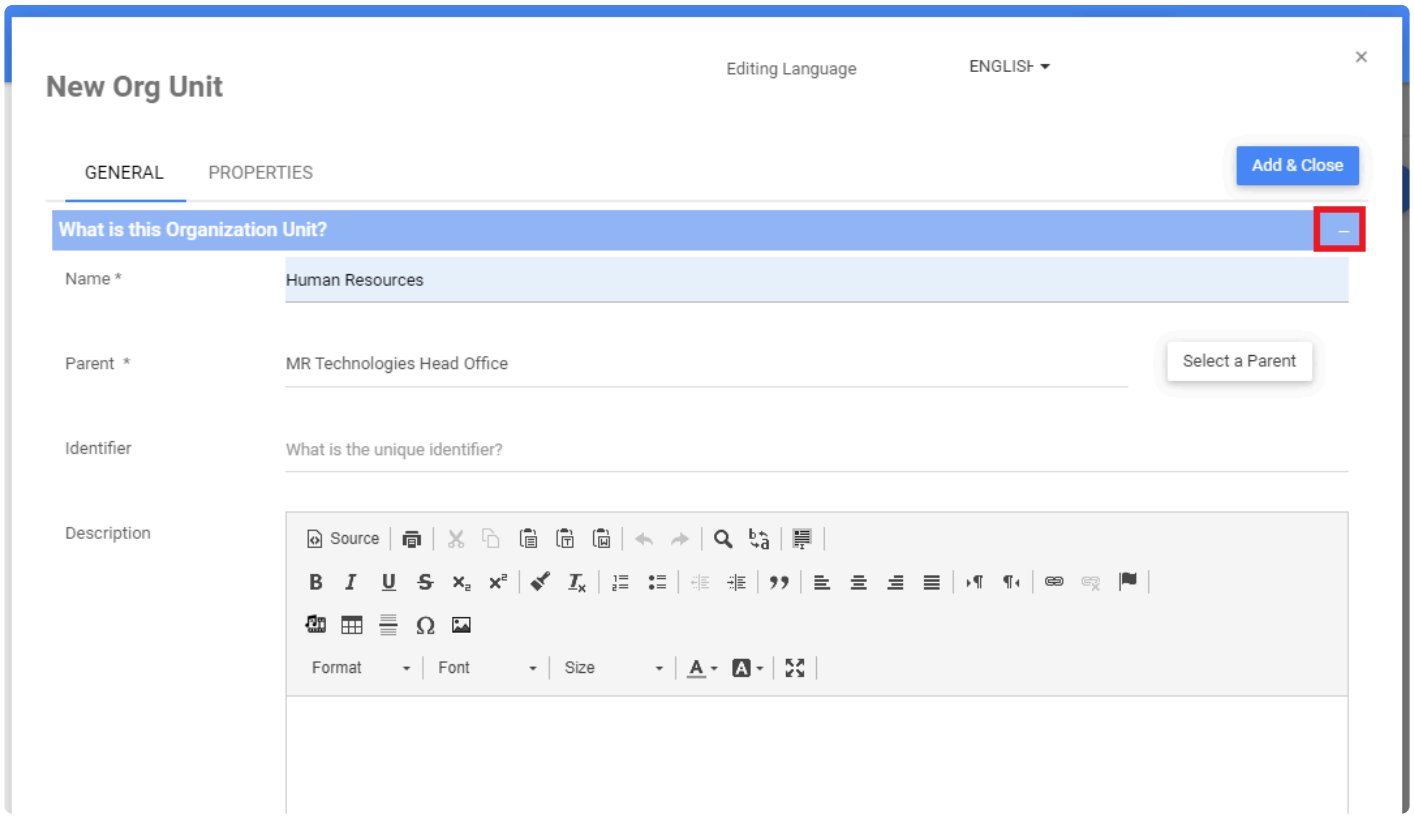


The EPC automatically assigns the Folder as the Parent, which is the Set or Unit you selected in Step 2 above. The Parent field is blocked and cannot be edited.

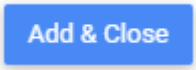
2. Use the + and − icons to expand and hide the different sections within the each tab of the New Organization Unit Window. Input the right information about the unit in each section.

The new Organization Unit window has two tabs, General and Properties. Under each tab there are different sections where the Web Modeler can input detailed information about the Organization Unit. To learn more about about each section and how to input information, see the Edit Organization Objects section.

i) To hide sections, click on the − icon:

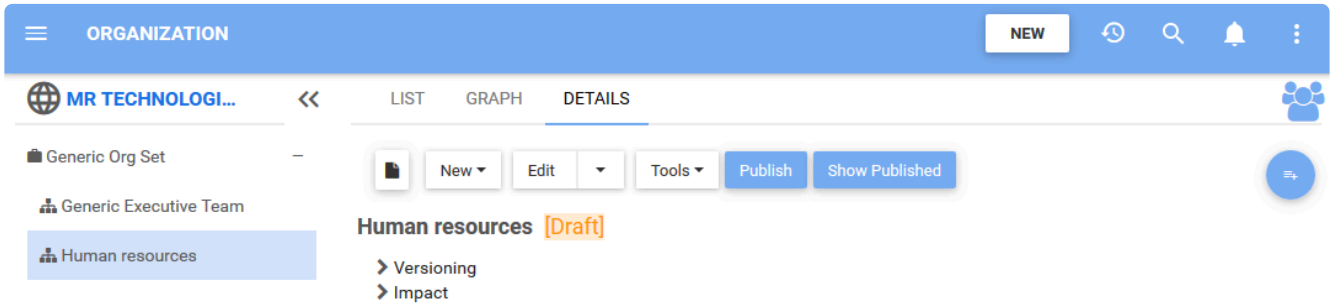


ii) To expand sections, click on the + icon:

3. Click on the button 

to create the Organization Unit

4. The new Organization Unit “Human Resources” is now on the Organization tree structure. This organization unit is currently a draft. To learn how to publish Organization objects, click here



12.4.1.4 Create a Role

Roles represent specific skill sets, responsibilities and positions within an organization. They define the requirements needed to perform an activity without ascribing them to a specific individual. One resource may have different responsibilities and job, therefore, one resource can have many roles within the company.

Roles are found within the Units of the Organization.

Examples of Roles:

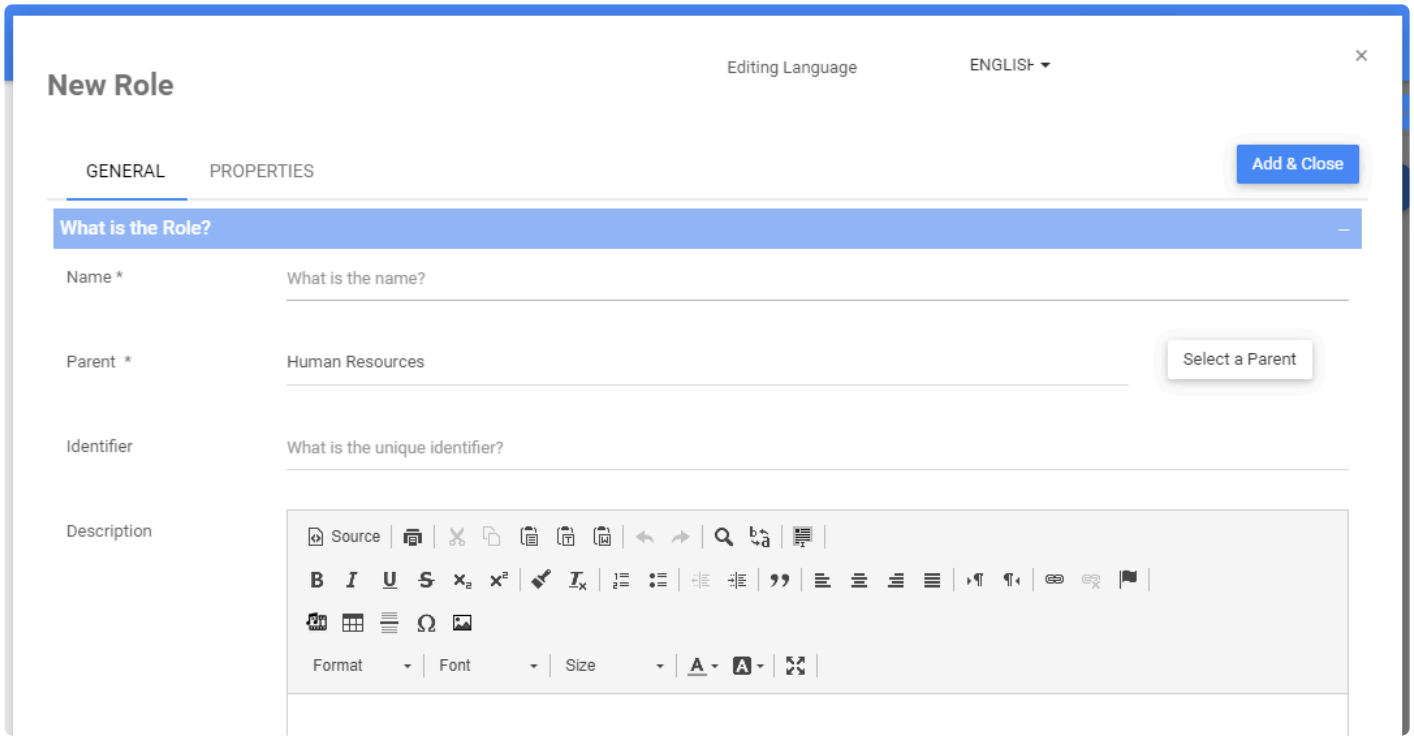
For instructions on how to create a new Role, see the Create Objects section.

Filling out a New Role form

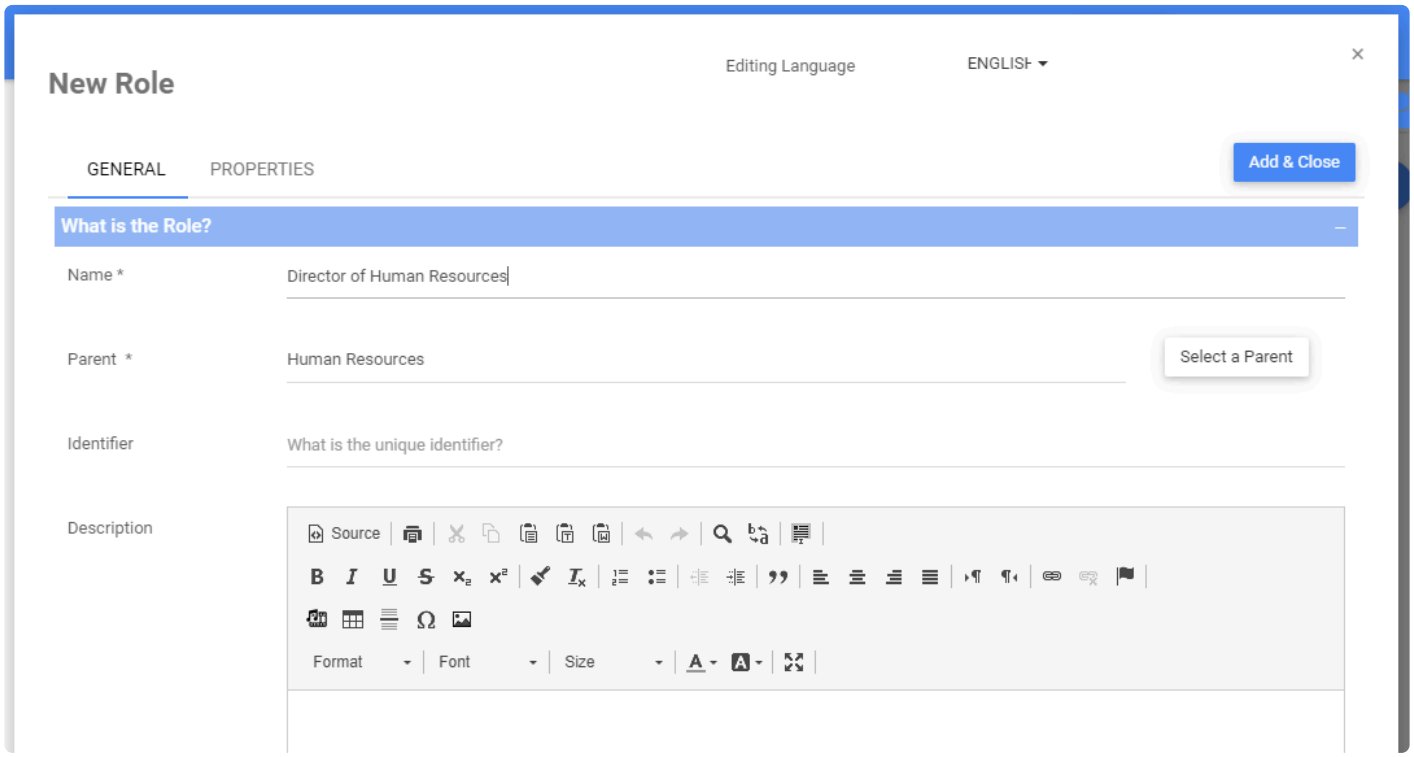
> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

1. Type the name of the Role on the “What is the name?” field

> The Name field is **mandatory** for all objects.



For this example, the name of the Role is “Director of Human Resources”

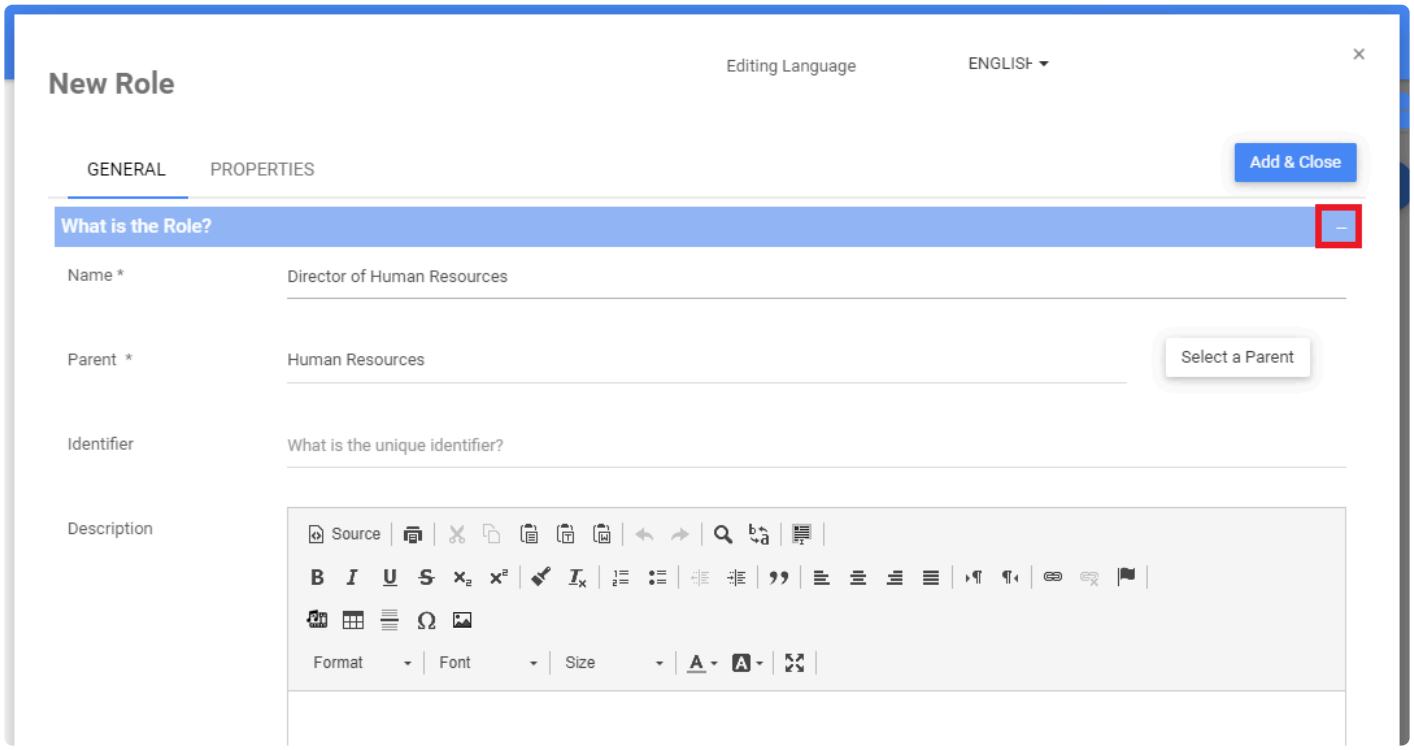


p(banner tip). The EPC automatically assigns the Unit as the Parent, which is the Organization Unit you selected. The Parent field is blocked and cannot be edited.

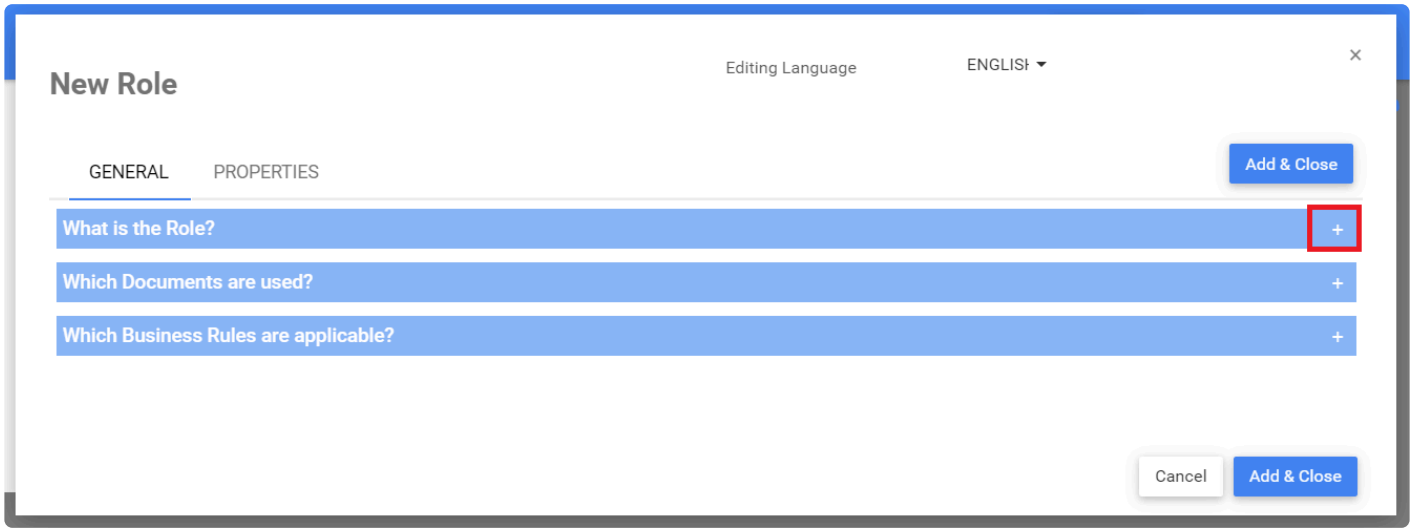
2. Use the + and − icons to expand and hide the different sections within the each tab of the New Role Window. Input the right information about the Role in each section.

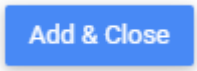
The new Role window has two tabs, General and Properties. Under each tab there are different sections where the Web Modeler can input detailed information about the Role. To learn more about about each section and how to input information, see the Edit Organization Objects section.

i) To hide sections, click on the icon:

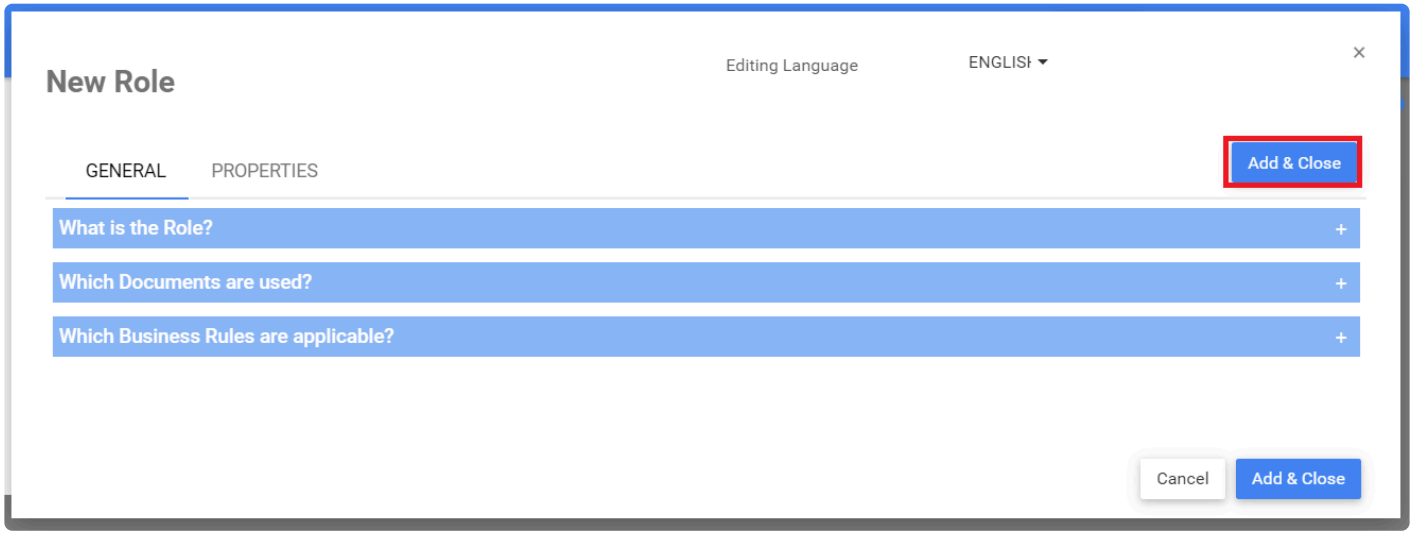


ii) To expand sections, click on the icon:

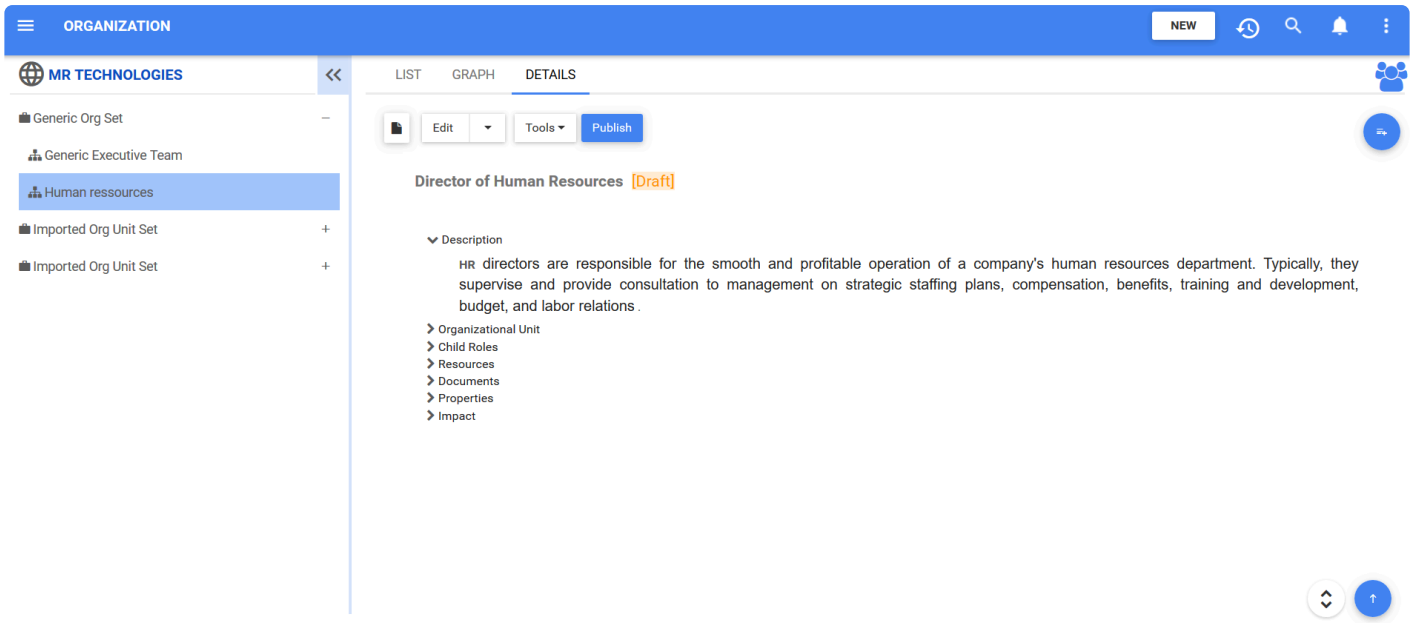


3. Click on the button 

to create the Role



4. The new Role “Director of Human Resources” is now on the Organization tree structure. This role is currently a draft. To learn how to publish Organization objects, click here



12.4.1.5 Create an Asset

Assets represent non-human entities that perform work or are utilized by Resources to perform work within the organization. Assets are pieces of equipment essential to the business, and help automating tasks.

Assets are found within the Units of the Organization.

Examples of Assets:

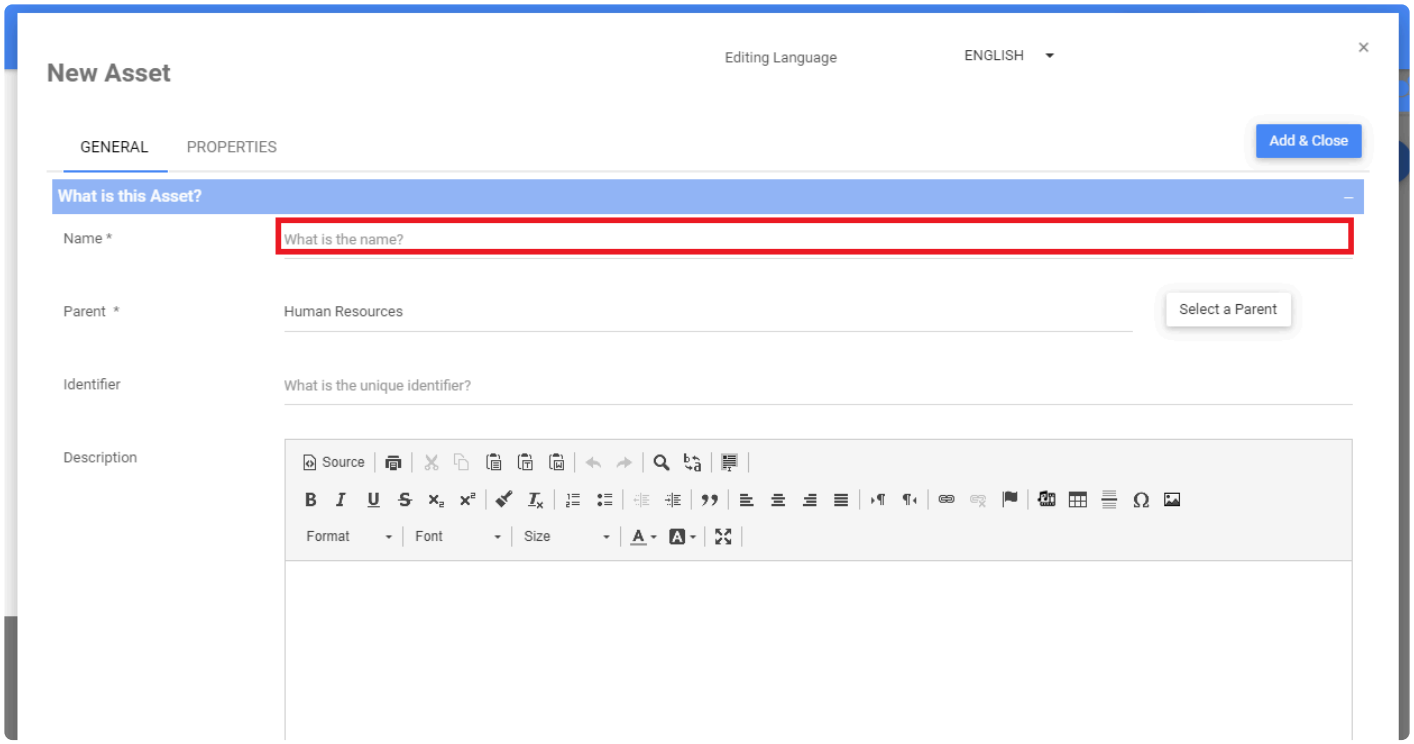
For instructions on how to create a new Asset, see the Create Objects section.

Filling out a New Asset form

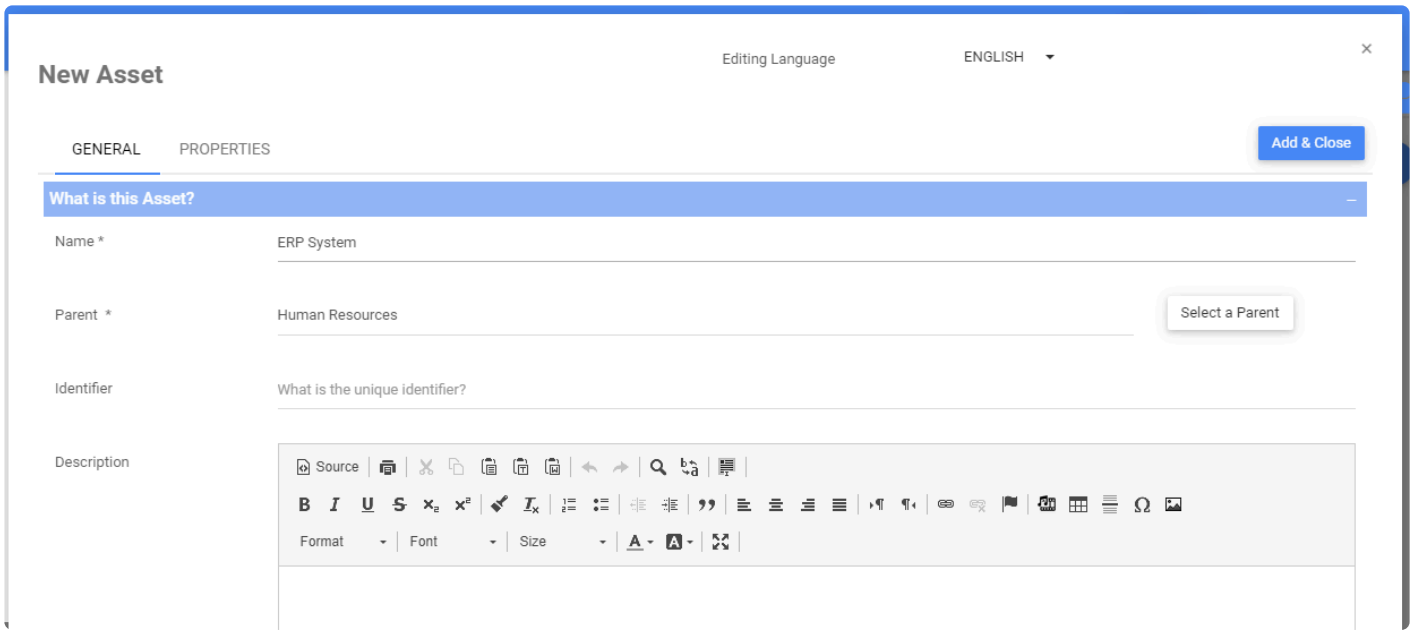
> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

1. Type the name of the Asset on the “What is the name?” field

> The Name field is **mandatory** for all objects.



For this example, the name of the Asset is “ERP System”

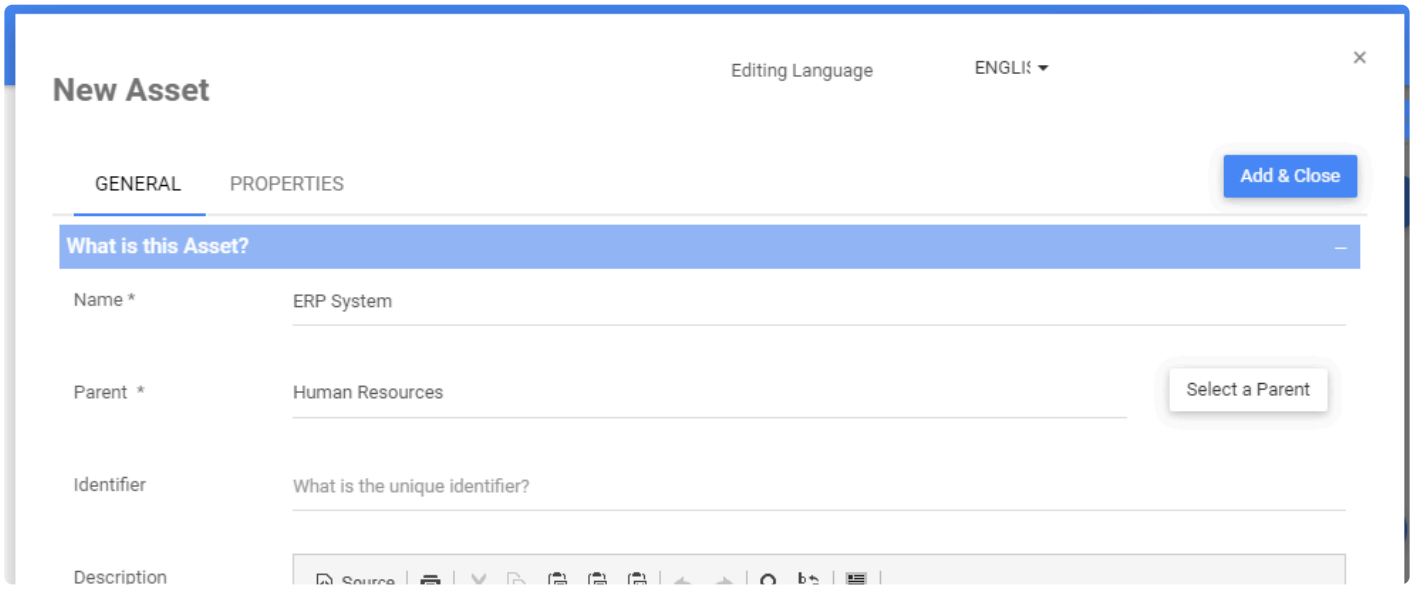


The EPC automatically assigns the Unit as the Parent, which is the Organization Unit you selected. The Parent field is blocked and cannot be edited.

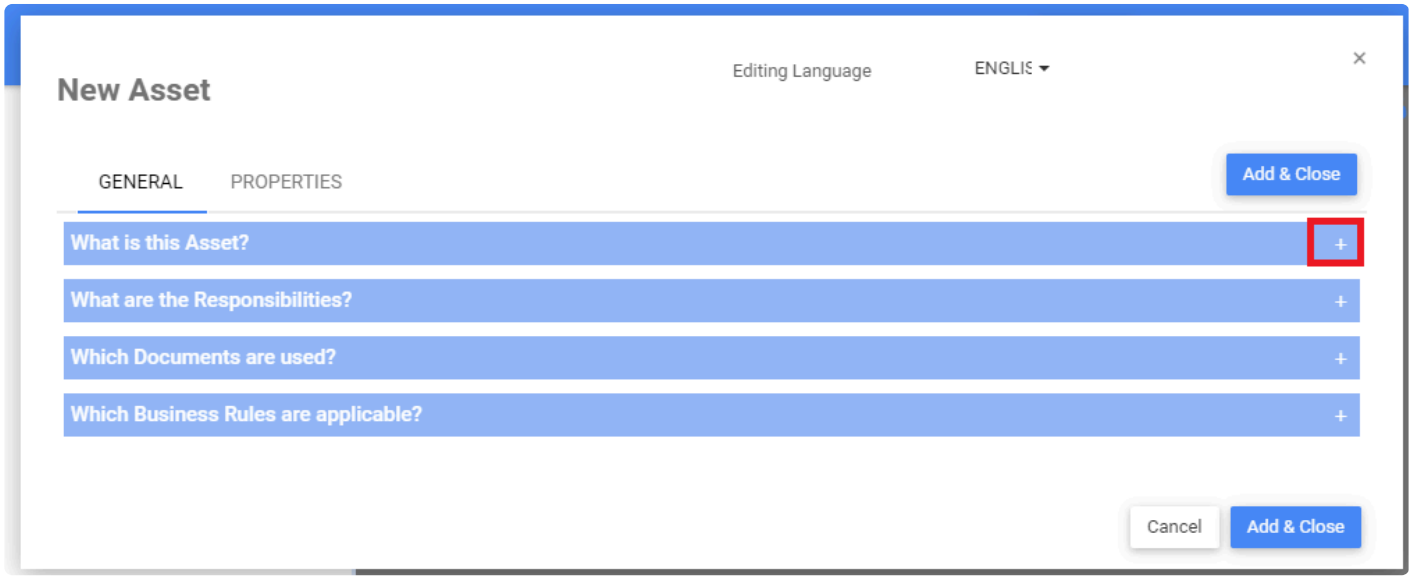
2. Use the + and − icons to expand and hide the different sections within the each tab of the New Asset Window. Input the right information about the Asset in each section.

> The new Asset window has two tabs, General and Properties. Under each tab there are different sections where the Web Modeler can input detailed information about the Asset. To learn more about about each section and how to input information, see the Edit Organization Objects section.

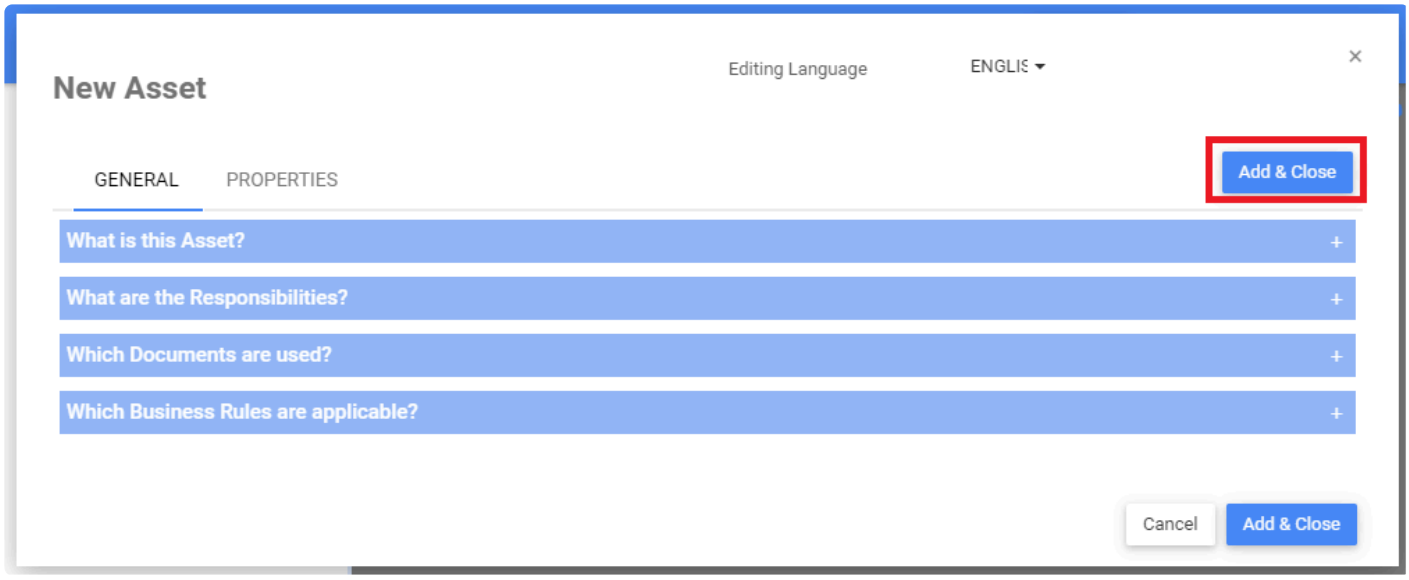
i) To hide sections, click on the − icon:



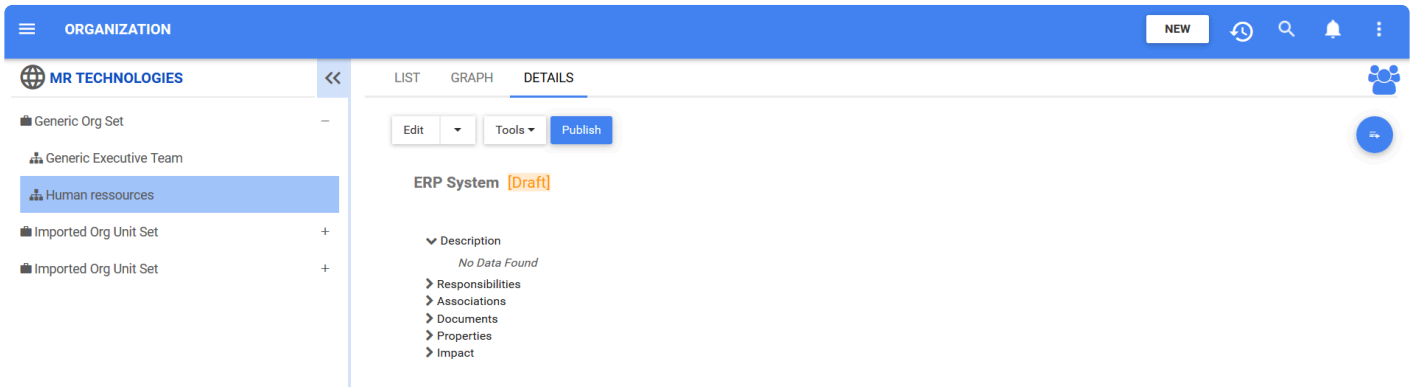
ii) To expand sections, click on the + icon:



3. Click on the button Add & Close to create the Asset

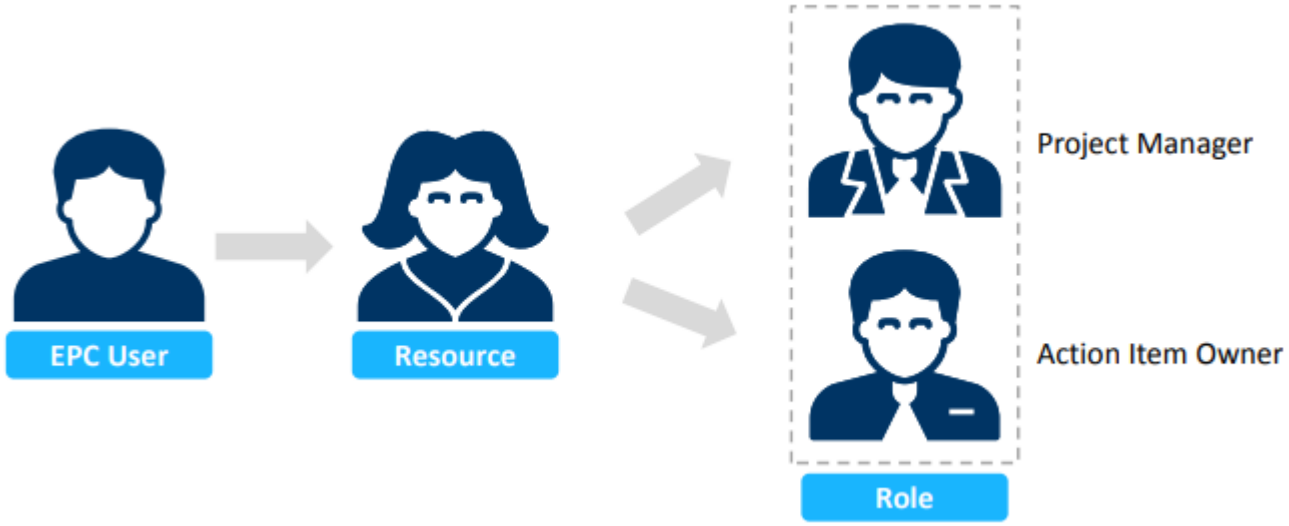


4. The new Asset “ERP System” is now on the Organization tree structure. This asset is currently a draft. To learn how to publish Organization objects, click here



12.4.1.8 Import Users as Resources

A resource represents a physical person (Employee) that performs work and executes activities in an organization. Resources in EPC can be associated to one or multiple roles. Multiple resources can also have the same role.

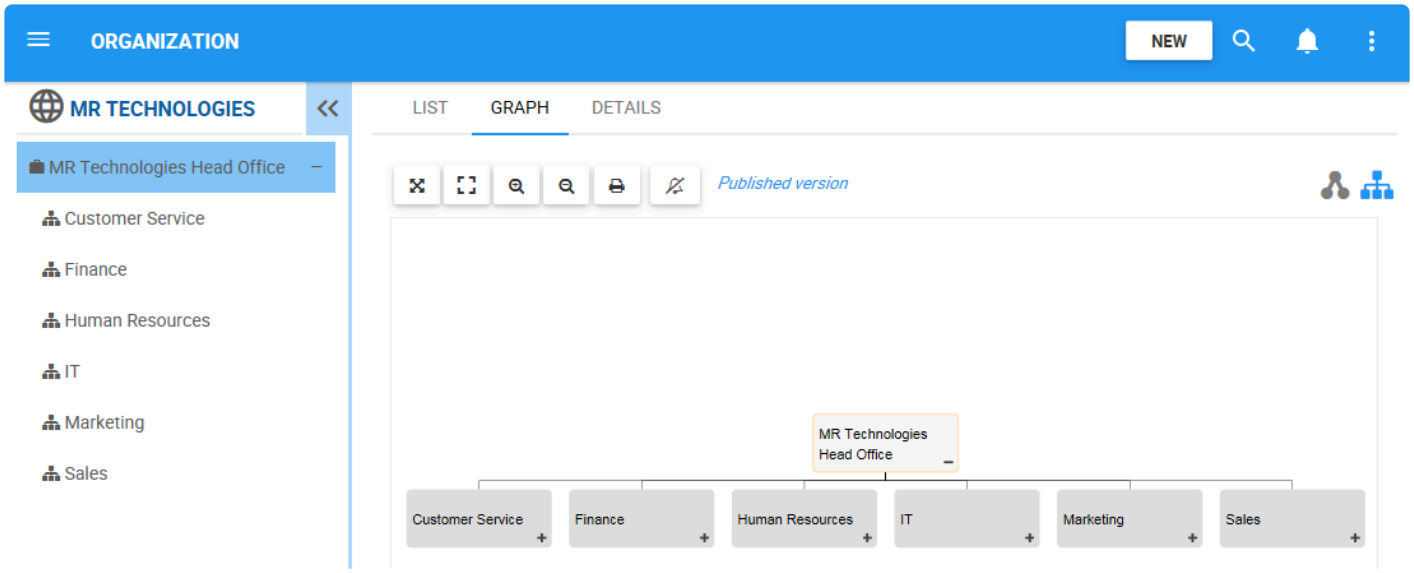


Web Modelers can import EPC users as Resources. EPC will import all the users who have environment permissions. Resources will be created for all users that have been granted access to this environment, which are not yet assigned to a resource in the current environment.

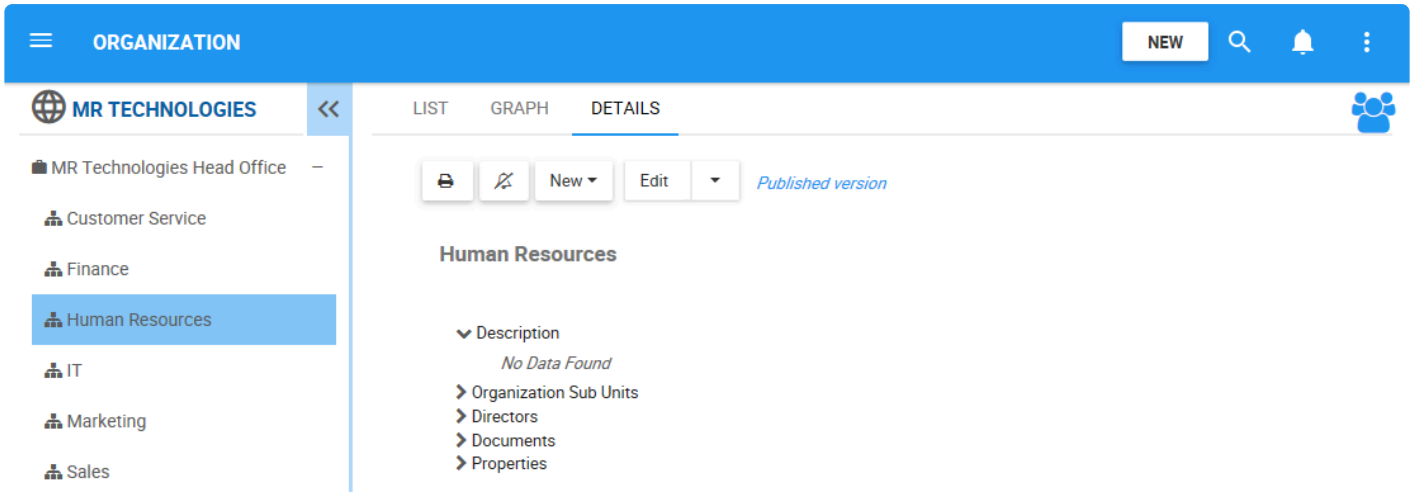
Import Users as Resources

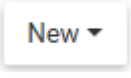
> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

1. Navigate to the Organization Module

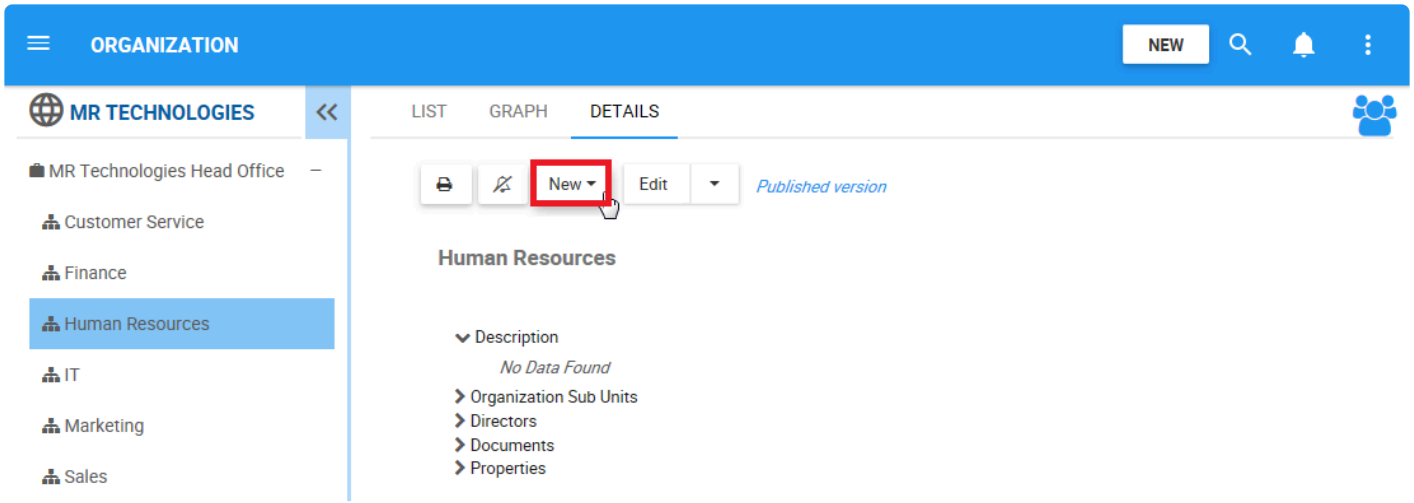


2. Navigate to the details section of the Organization Unit you would like to import users to. In this example, the Organization Unit is “Human Resources”

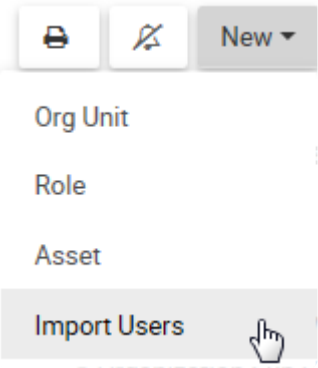


3. Navigate to the 

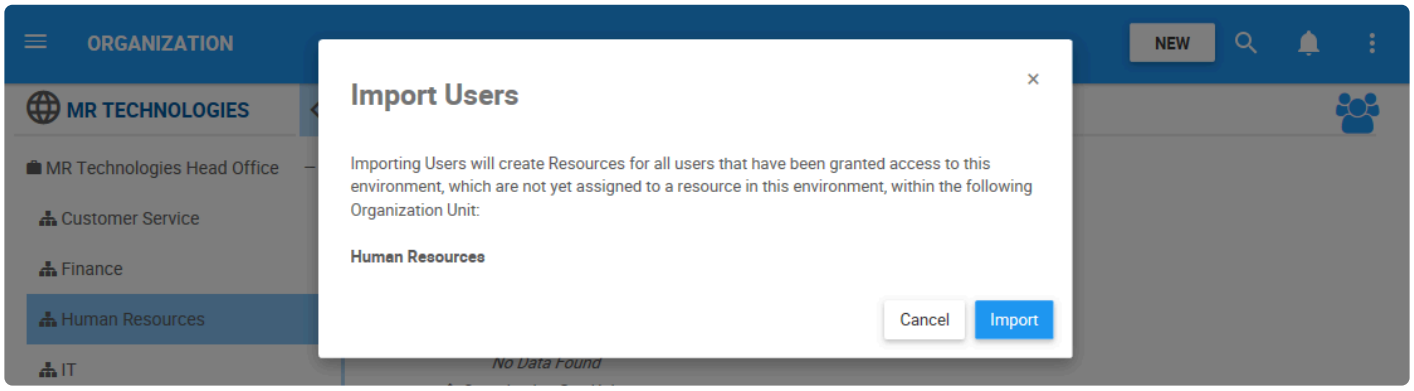
button



4. A drop-down will be generated. Select the “Import Users” option

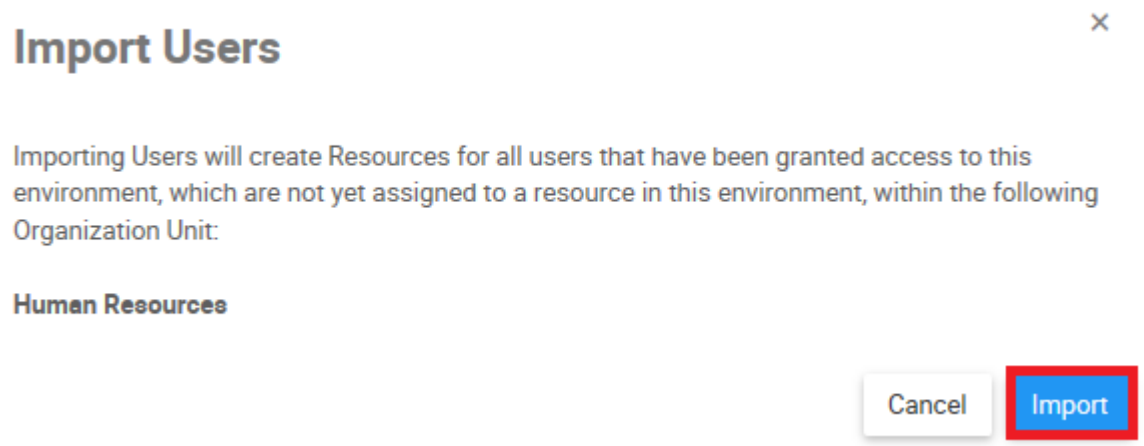


5. A window will be generated explaining that users will be imported as resources

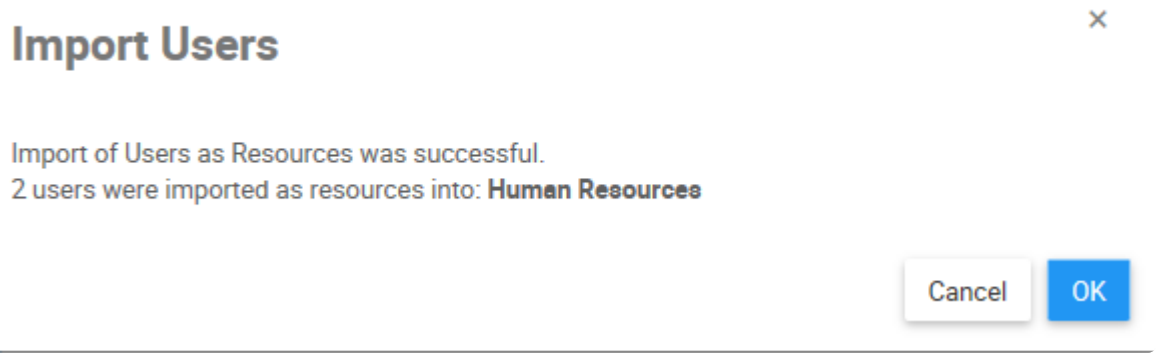


6. Click on

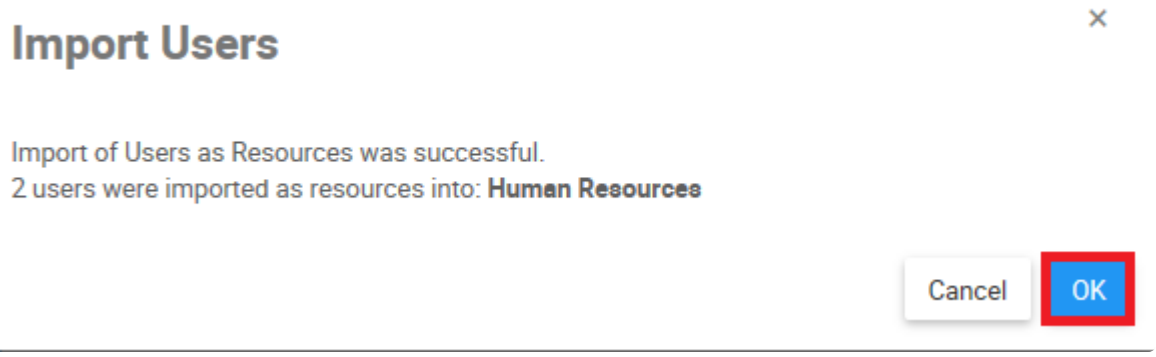
to import users to the “Human Resources” unit



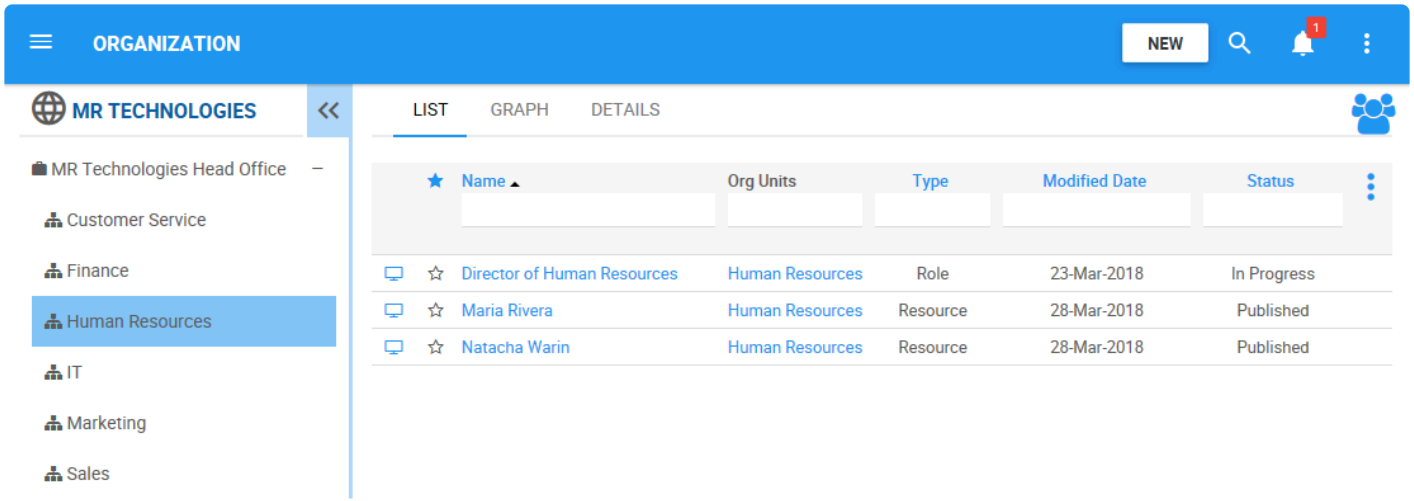
7. A window will be generated once users were successfully imported as resources. In this example, two users were imported



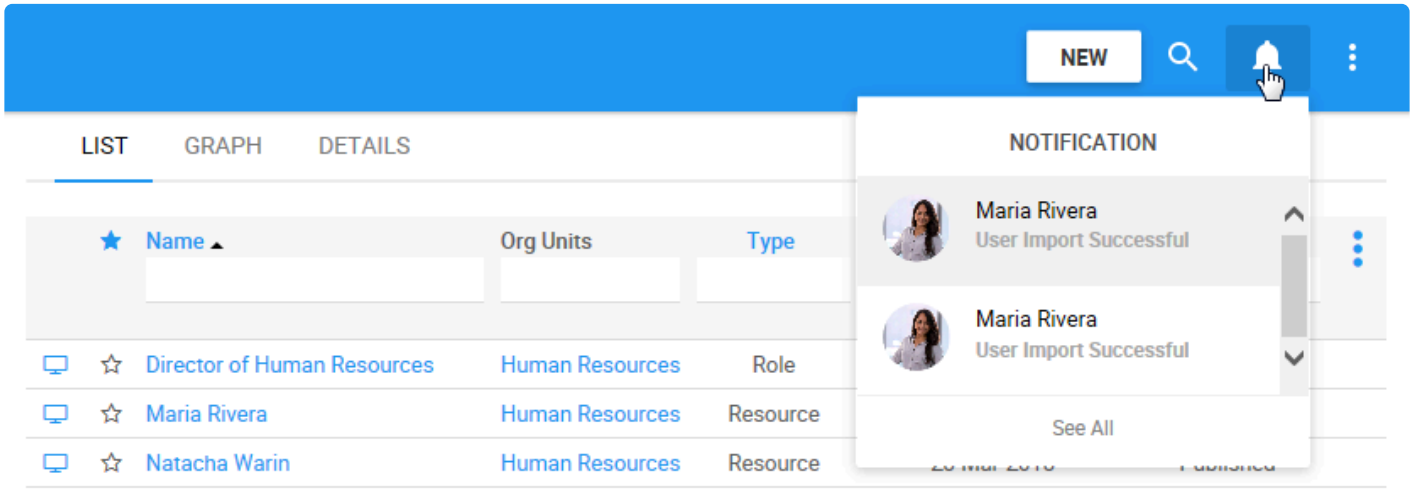
8. Click on the “Ok” button



9. The new resources will be under the “Human Resources” unit



10. You will receive a notification saying the user import was successful



To edit resources and assign roles to them, click here.

12.4.2 Edit Organization Objects

Web Modelers can edit the Details of Organization objects. They need to navigate to the Edit button of the Organization object to access the Edit Details window. The Edit Details window has two tabs, General, and Properties. Under each tab there are different sections where the Web Modeler can input detailed information about the Organization object.

Web Modelers can choose the editing language in the Edit Details window.

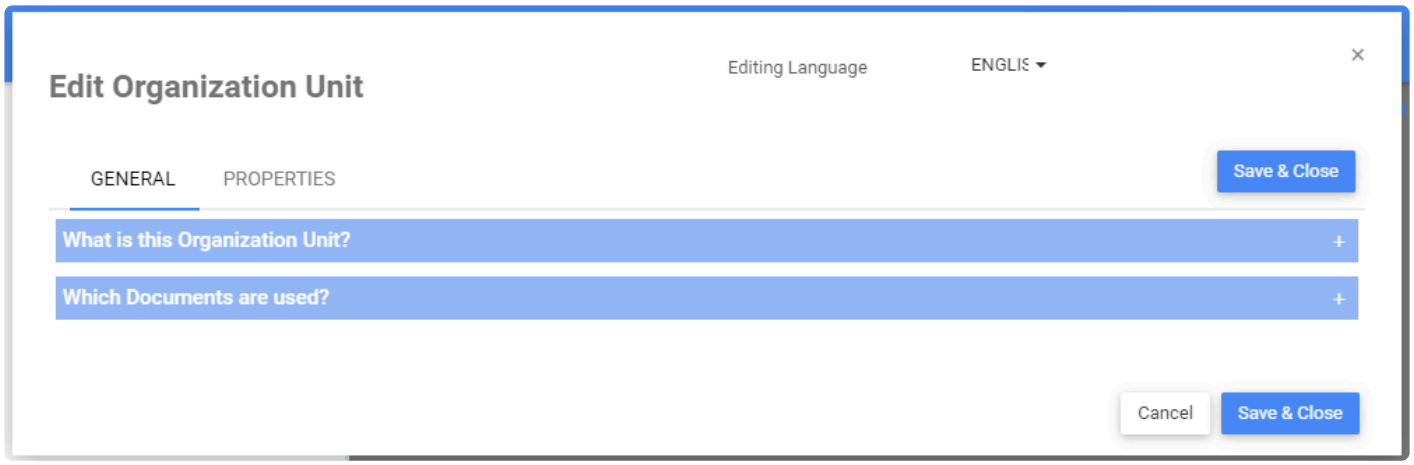
Only users with the Web Modeler Permission will be able to see the Edit Button on the toolbar; the displayed content needs to be set to Show Latest, and the editing tool is the Web.

This section will cover the following:

1. Edit Organization Unit General Details
2. Edit Role General Details
3. Edit Asset General Details
4. Edit Resource General Details
5. Edit Organization Objects Properties Details

12.4.2.1 Edit Organization Unit General Details

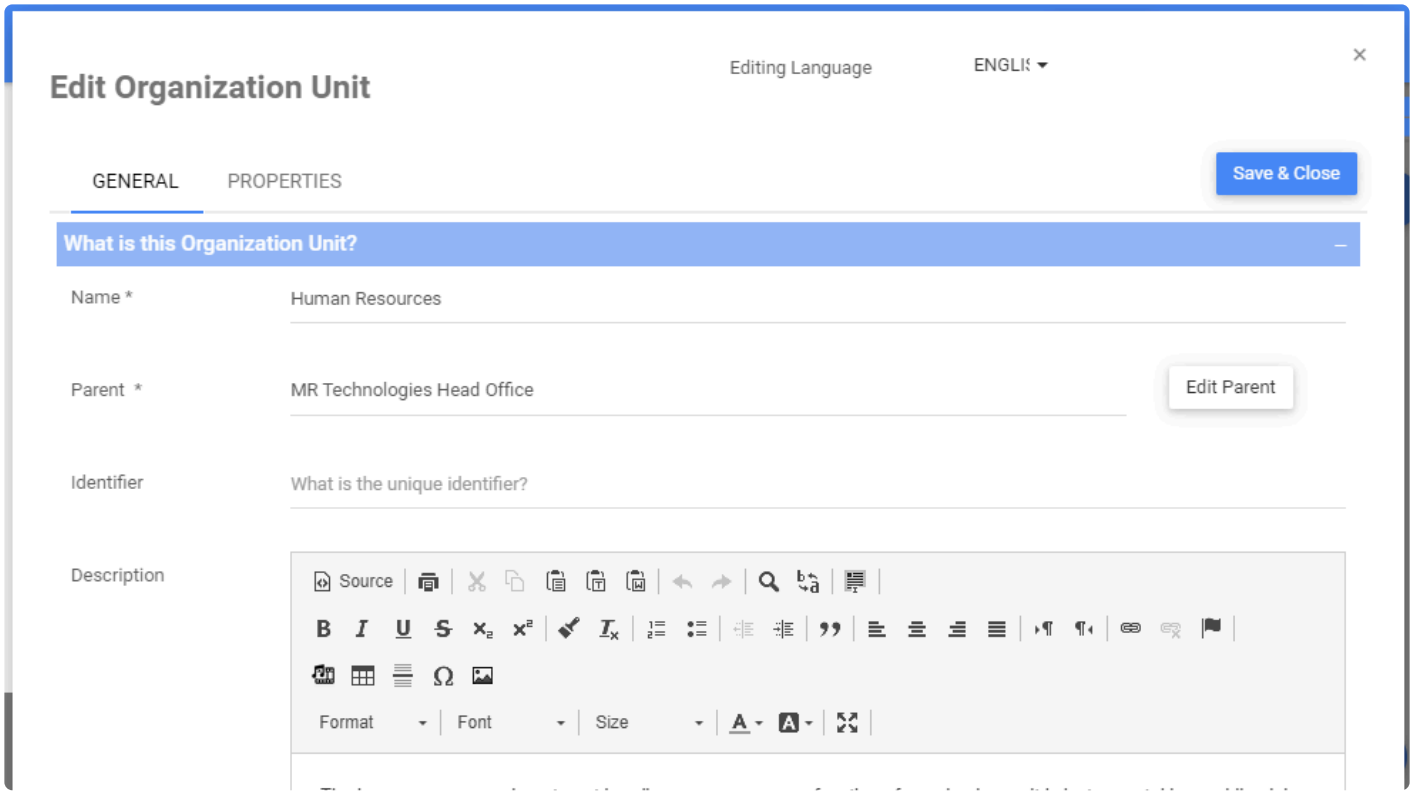
The General tab contains a section for the basic information about the Organization Unit, as well as the Document Association.



What is this Organization Unit?

This table below describes the fields of this section.

Field	Description
Name	The name of the Organization Unit. A name is **mandatory** for all objects
Parent Set/ Process	The Parent Set or Organization Unit under which this unit is nested
Identifier	The Identifier of the Organization Unit. This serves to uniquely identify the Unit as per your company protocol.
Description	This field describes the Organization Unit in detail. The rich text format allows for text formatting, images, URLs, tables, etc.



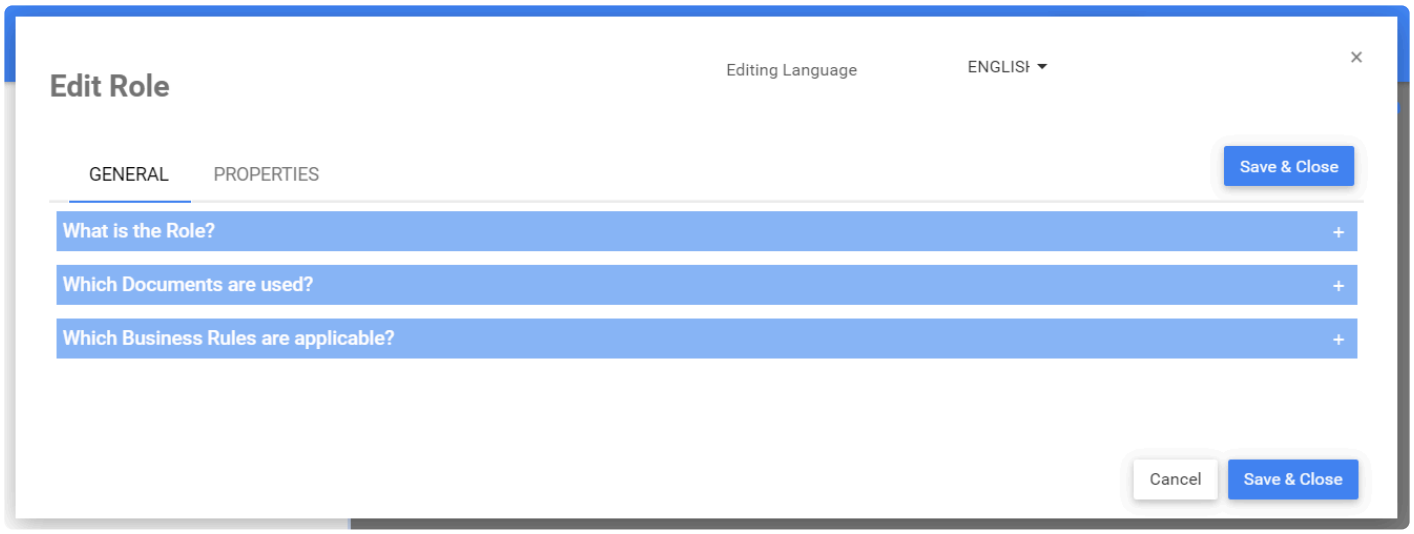
h2. Associations

Since the Associations sections are common to many EPC objects, the instructions have been centralized in the Associations section of the user manual. You can find direct links to instructions for specific sections below.

Section	Instructions
Which Documents are used?	Associate Documents

12.4.2.2 Edit Role General Details

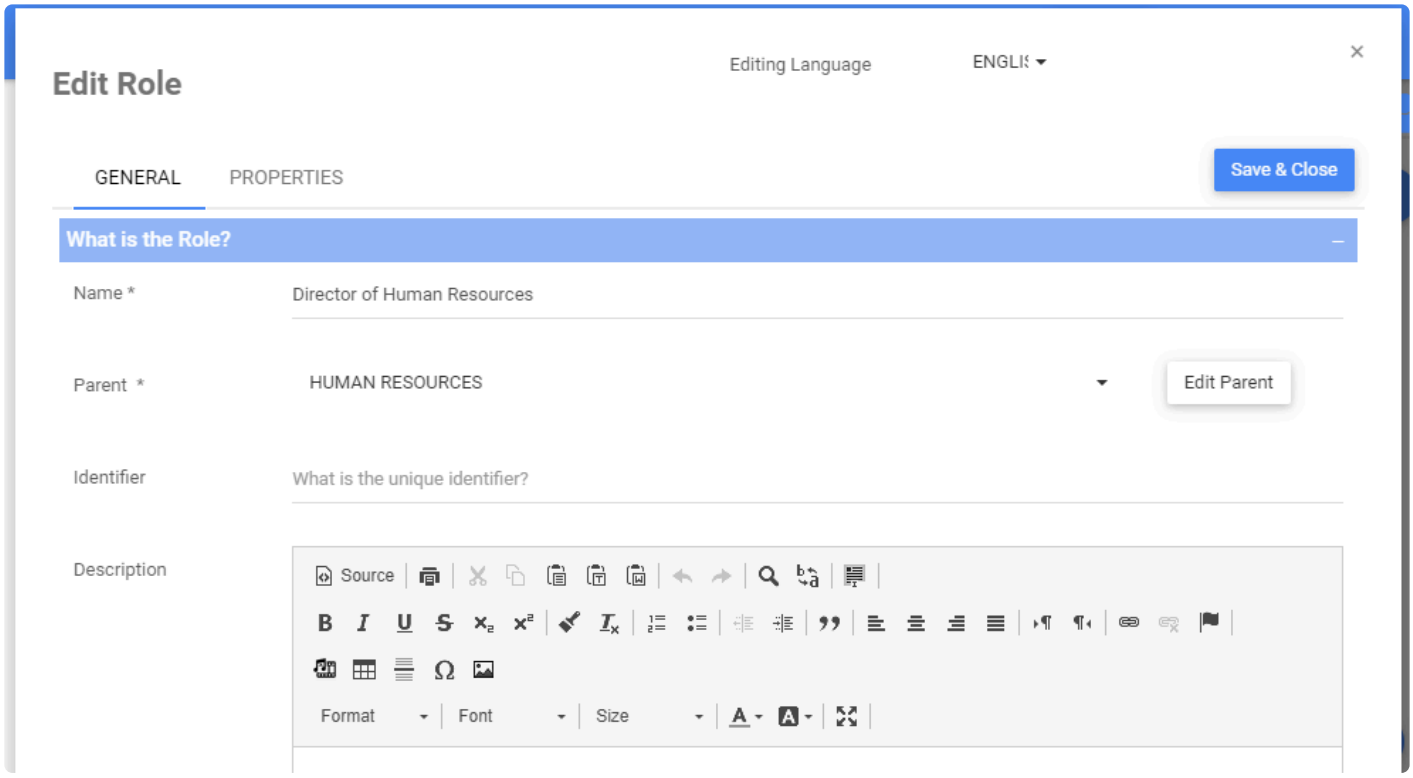
The General tab contains a section for the basic information about the Role, as well as the Associations section.



What is this Role?

This table below describes the fields of this section.

Field	Description
Name	The name of this Role. A name is **mandatory** for all objects.
Parent Organization Unit	The Organization Unit under which this Role is nested.
Identifier	The Unique Identifier of this Role. This serves to uniquely identify the Role as per your company protocol.
Description	This field describes the Role in detail, such as the qualifications required for the role. The rich text format allows for text formatting, images, URLs, tables, etc.



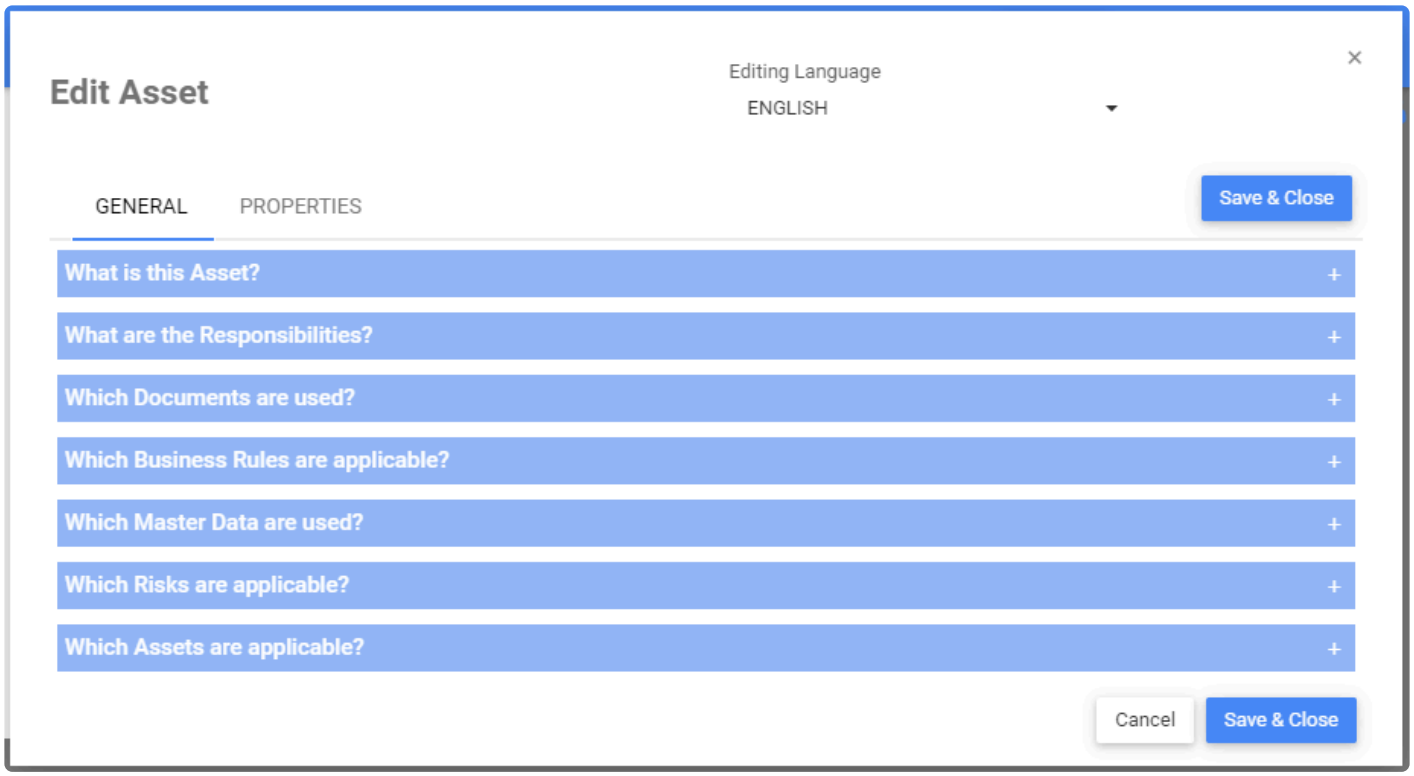
Associations

Since the Associations section is common to many EPC objects, the instructions have been centralized in the Associations section of the user manual. You can find direct links to instructions for specific sections below.

Section	Instructions
Which Documents are used?	Associate Documents
Which Business Rules are applicable?	Associate Business Rules

12.4.2.3 Edit Asset General Details

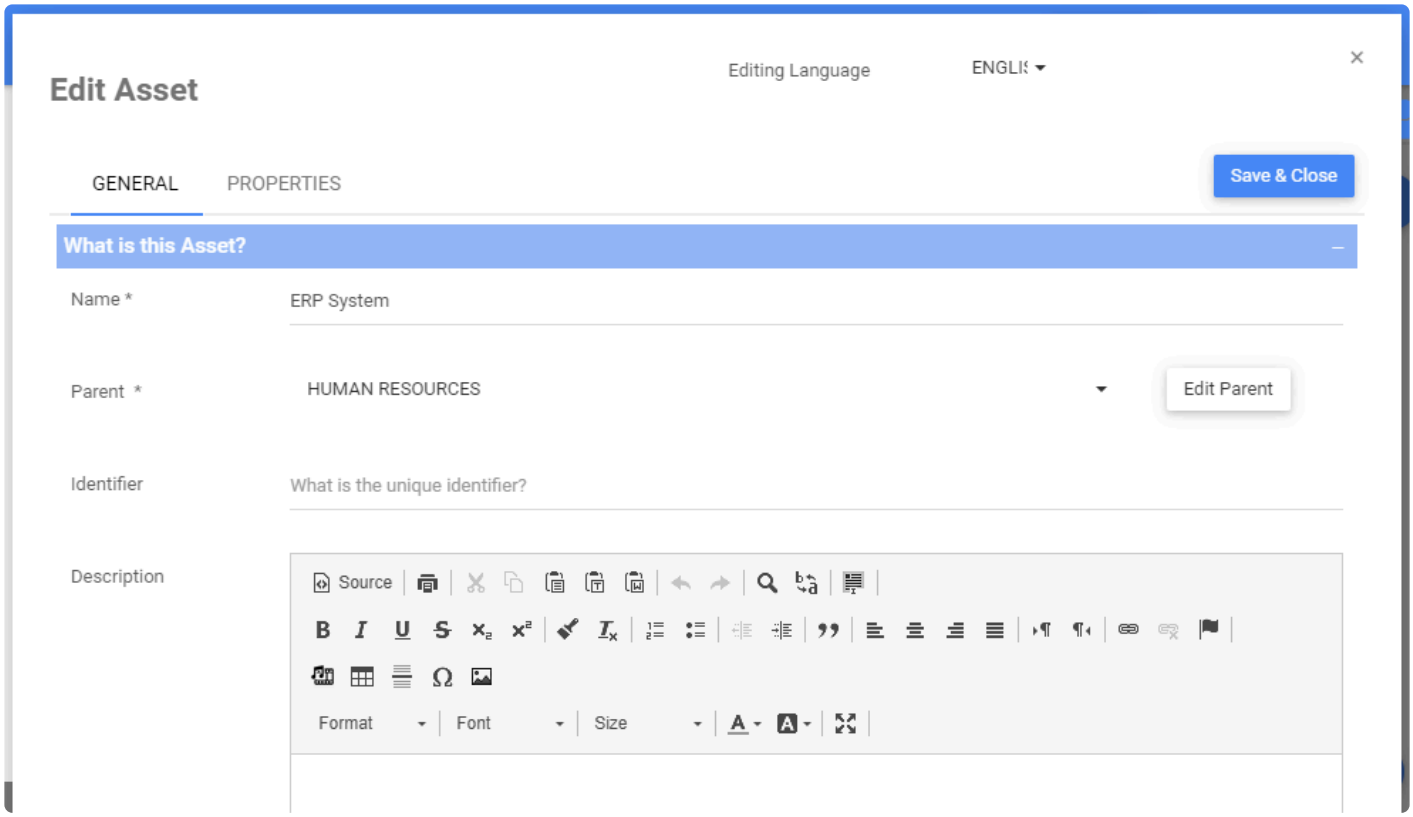
The General tab contains a section for the basic information about the Asset, as well as the Responsibilities and Associations sections.



h2. What is this Asset?

This table below describes the fields of this section.

Field	Description
Name	The name of this Asset. A name is **mandatory** for all objects.
Parent Organization Unit	The Organization Unit under which this Asset is nested.
Identifier	The Unique Identifier of this Asset. This serves to uniquely identify the Role as per your company protocol.
Description	This field describes the Asset in detail. The rich text format allows for text formatting, images, URLs, tables, etc.



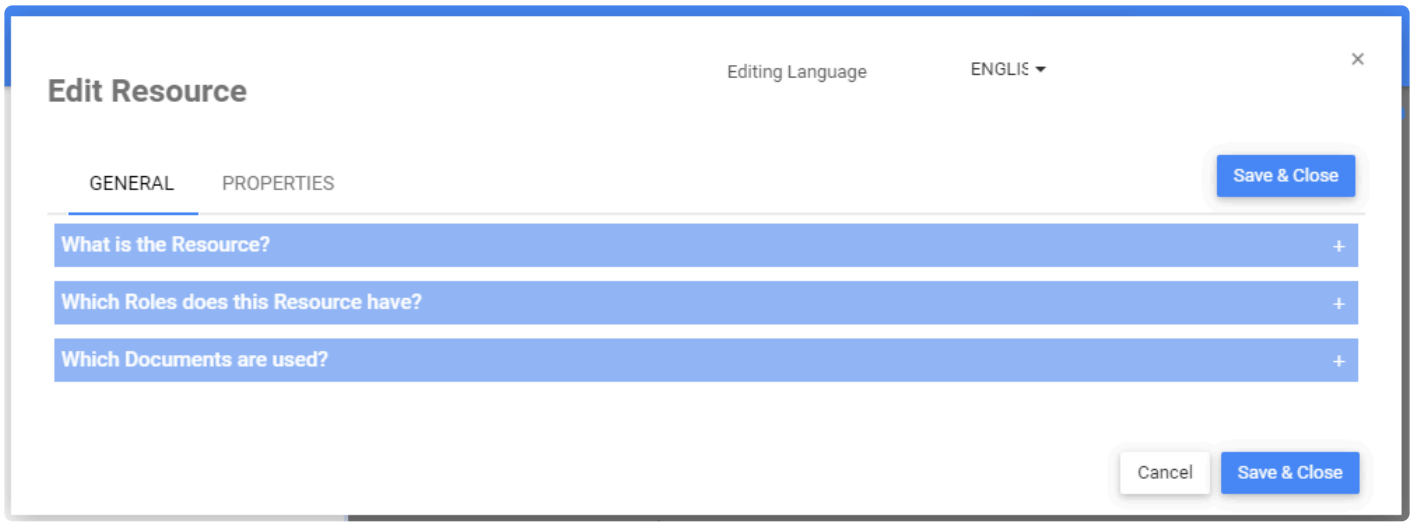
h2. Responsibilities and Associations

Since the Associations section is common to many EPC objects, the instructions have been centralized in the Associations section of the user manual. You can find direct links to instructions for specific sections below.

Section	Instructions
What are the Responsibilities?	Assign Responsibilities
Which Documents are used?	Associate Documents
Which Business Rules are Applicable?	Associate Business Rules
Which Master Data are used?	Associate Master Datas
Which Risks are Applicable?	Associate Risks
Which Asset are Applicable?	Associate Assets

12.4.2.4 Edit Resource General Details

The General tab contains a section for the basic information about the Resource, as well as the Responsibilities and Associations sections.

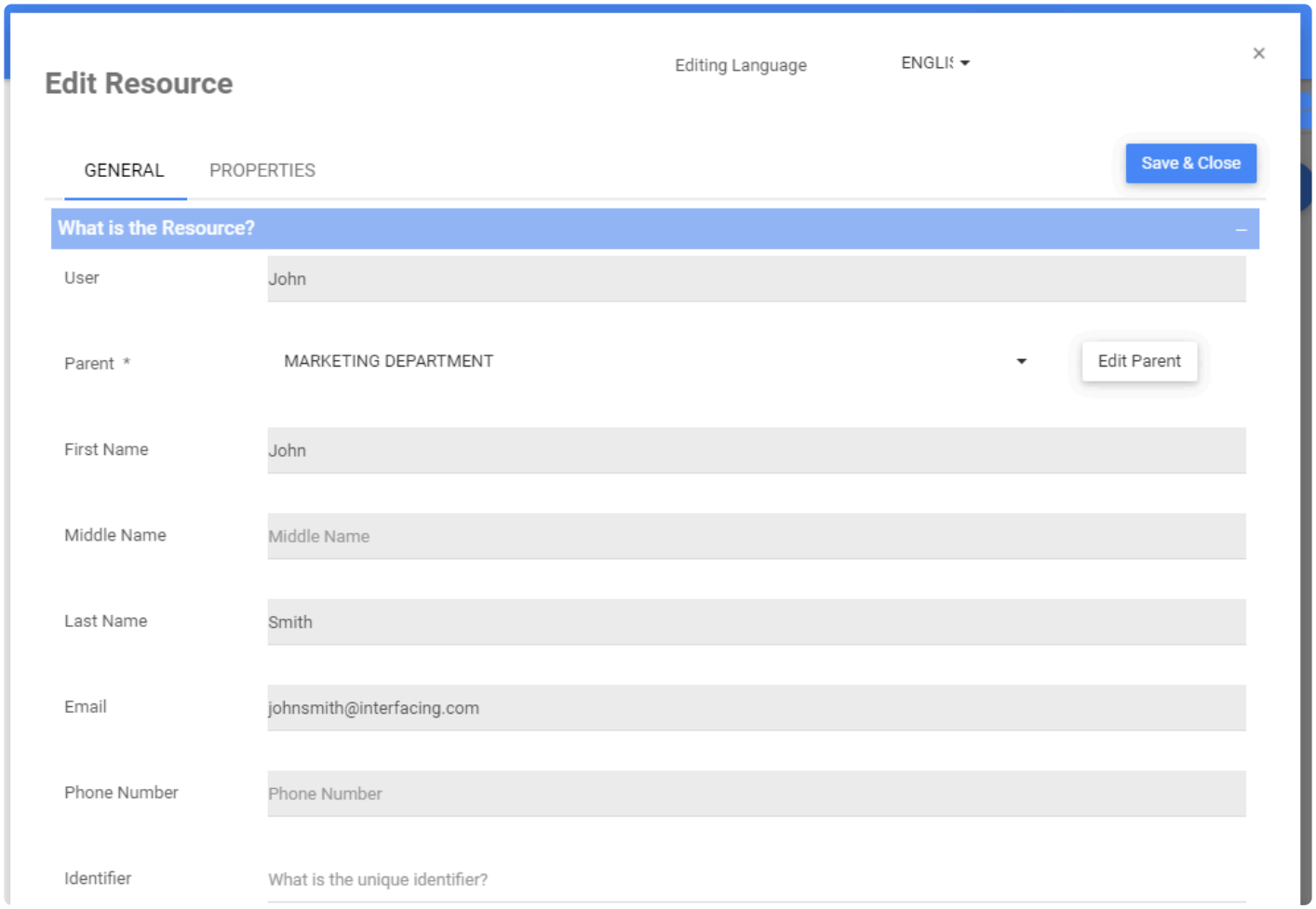


What is this Resource?

This table below describes the fields of this section.

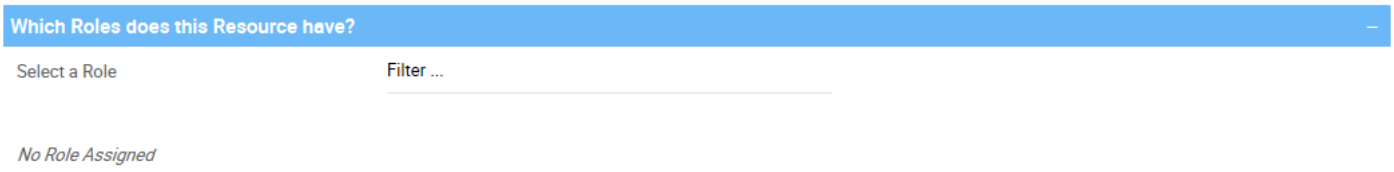
Field	Description
User	The name of the user
Parent Organization Unit	The Organization Unit under which this Resource is nested.
First Name	First Name of the user.
Middle Name	Middle Name of the user.
Last Name	Last Name of the user.
Email	Email of the user.
Phone Number	Phone number of the user.
Identifier	The Unique Identifier of this Resource. This serves to uniquely identify the Resource as per your company protocol.
Description	This field describes the Resource in detail. The rich text format allows for text formatting, images, URLs, tables, etc.

The first 7 fields contain specific information about the user; these fields are blocked, and can only be edited in the System Admin > User section

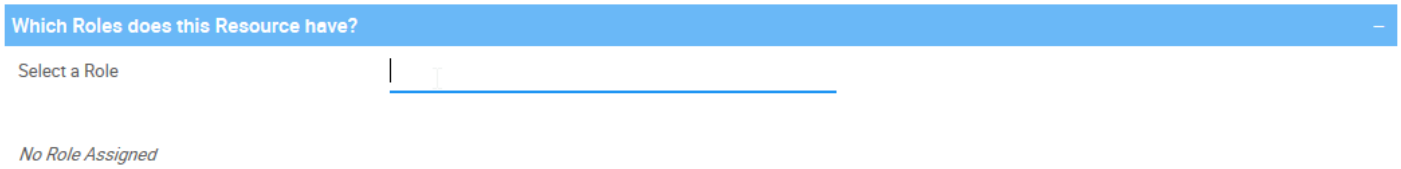


Which Roles does this Resource have?

Resources have one or many Roles in the Organization. In this section, the Web Modeler can assign the roles for a resource.

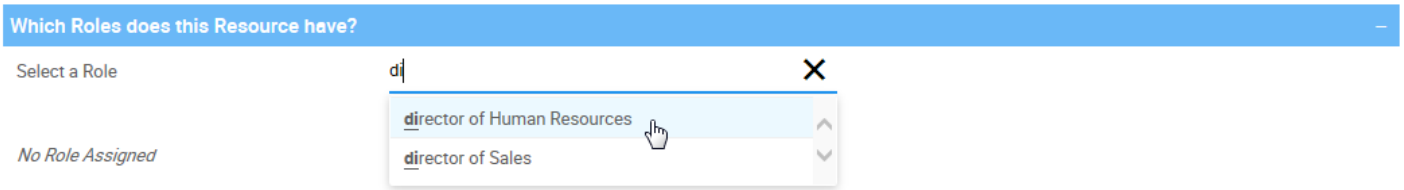


1. Navigate to the “Select a Role” field

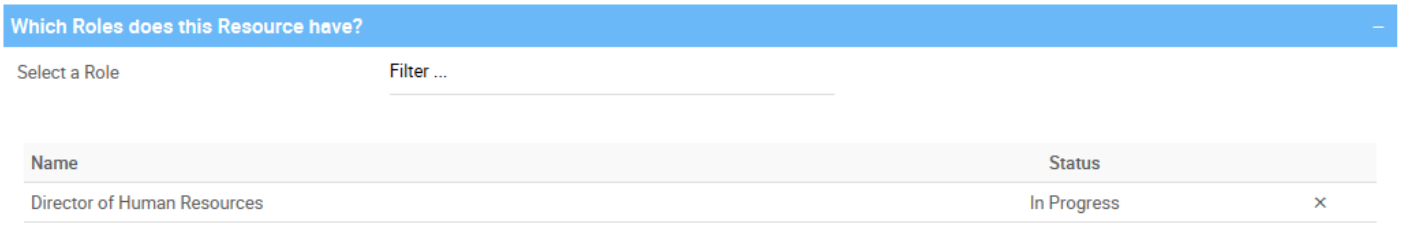


2. Type the name of the Role you want to associate. From the search suggestions, click to select the Role you want to associate.

> The list of roles will populate based on key word typing



3. The Role(s) will appear in a table displaying the name of the role, and its status



Associations

Since the Associations section is common to many EPC objects, the instructions have been centralized in the Associations section of the user manual. You can find direct links to instructions for specific sections below.

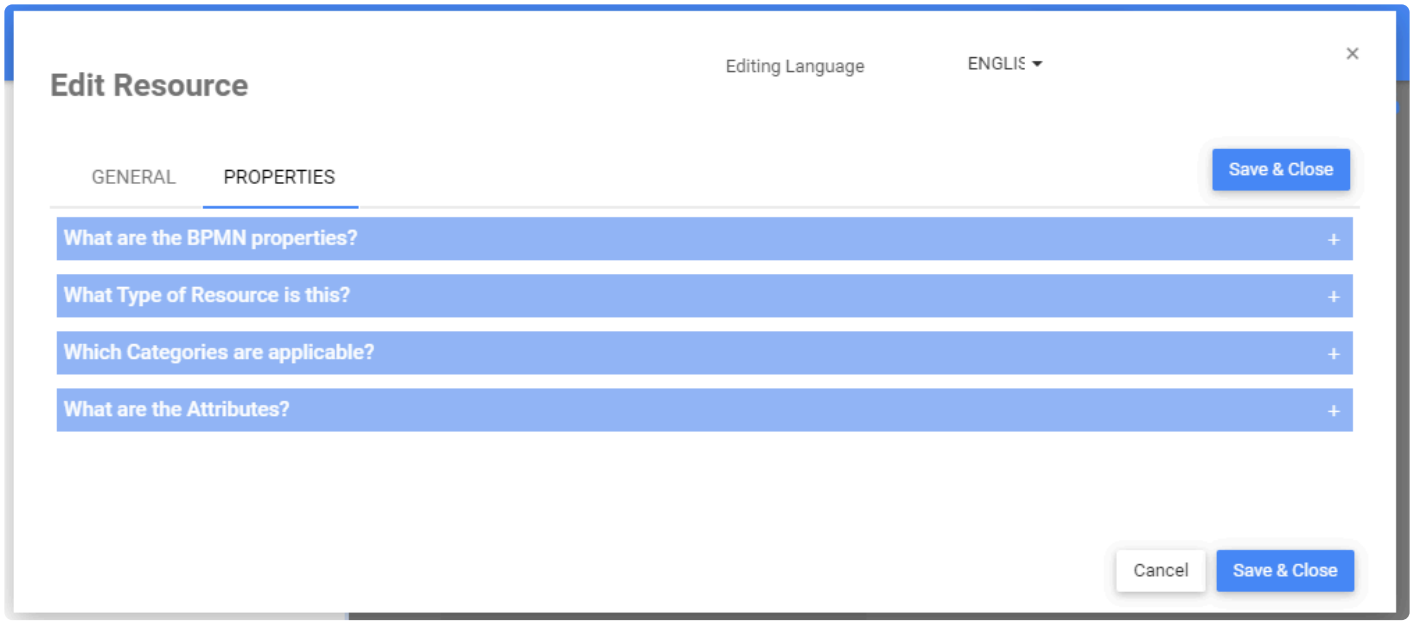
Section	Instructions
Which Documents are used?	Associate Documents

12.4.2.5 Edit Organization Objects Properties Details

The Properties tab contains sections for the BPMN Properties, the type, the categories applicable and the attributes.

The Properties tab is available for the following Organization Objects:

- Organization Units
- Roles
- Assets
- Resources



What are the BPMN Properties?

Dedicated Pool

Dedicated Pools allows Web Modelers to isolate specific Organization objects into separate swimlanes. Users can isolate Organization Units, Roles, and Assets by selecting the Dedicated Pool checkbox.

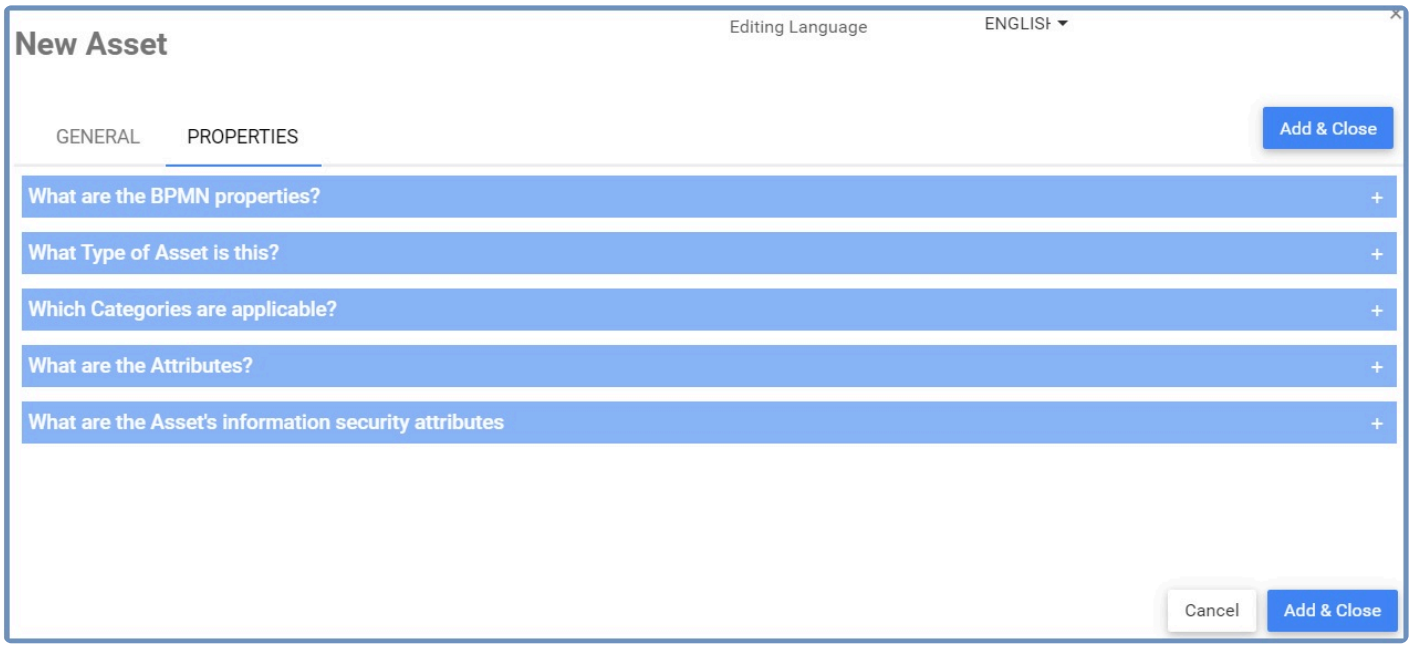
Properties

Since the Properties sections are common to many EPC objects, the instructions have been centralized in the Properties section of the user manual. You can find direct links to instructions for specific sections below.

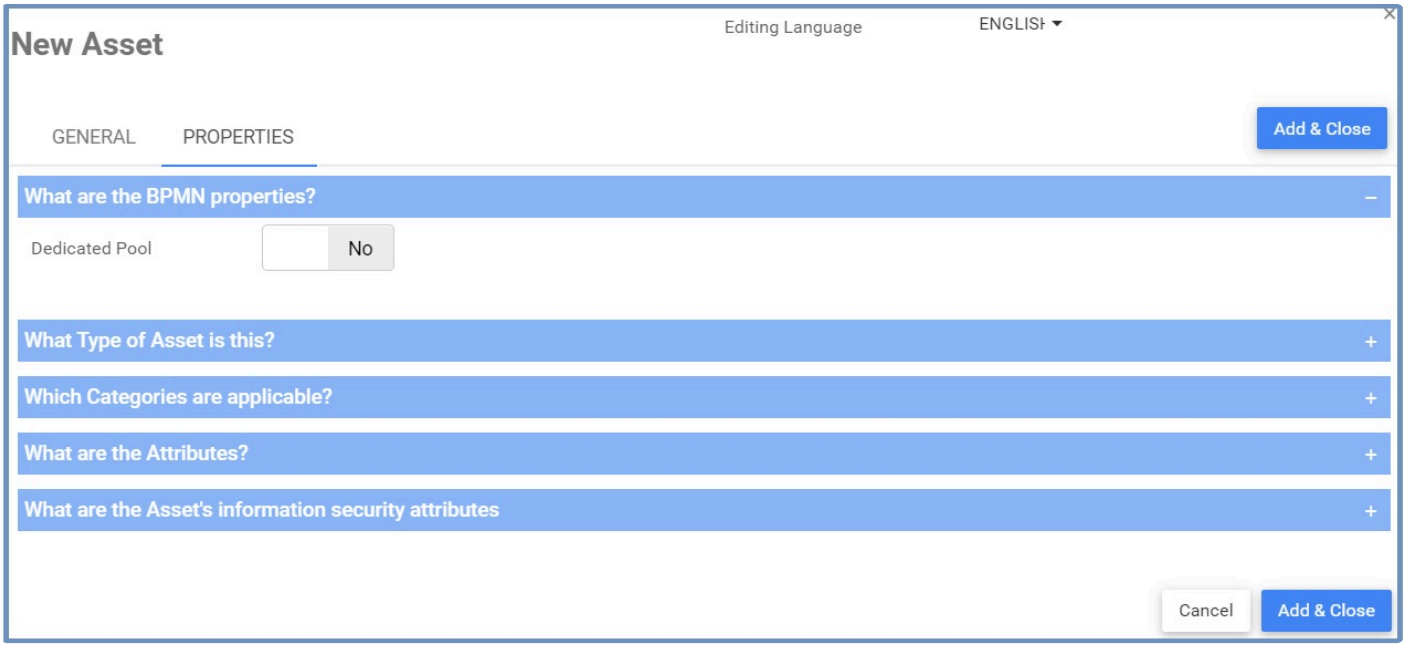
Section	Instructions
What type of [Object] is this?	Object Type
Which Categories are applicable?	Object Categories
What are the Attributes?	Object Attributes

12.4.2.6 Edit Asset Properties Detail

The Properties tab contains sections for the BPMN Properties, the type, the categories applicable, the attributes and the Asset's information security attributes.



What are the BPMN Properties?



Dedicated Pool

Dedicated Pools allows Web Modelers to isolate specific Organization objects into separate swimlanes.

Users can isolate Organization Units, Roles, and Assets by selecting the Dedicated Pool checkbox.

What are the Asset's Information Security Attributes

SLA

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

RTO

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

RPO

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

Business Priority

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

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

Business Impact

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

Security Rating

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

Service Hours

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

Serial Number

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

Data Sensitivity

Web Modeler can define the Data Sensitivity attribute in the Asset's Information Security attribute and It is a single select static dropdown field that consists of some predefined values that allow a modeller to select only one value at a time from the dropdown.

Personal Information

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

Vendor/Technology Supplier

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

Current Release Version

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

Vendor Release Status

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

Delivery Model

Web Modeler can define the Delivery Model attribute in the Asset's Information Security attribute and It is a single select static dropdown field that consists of some predefined values that allow a modeller to select only one value at a time from the dropdown.

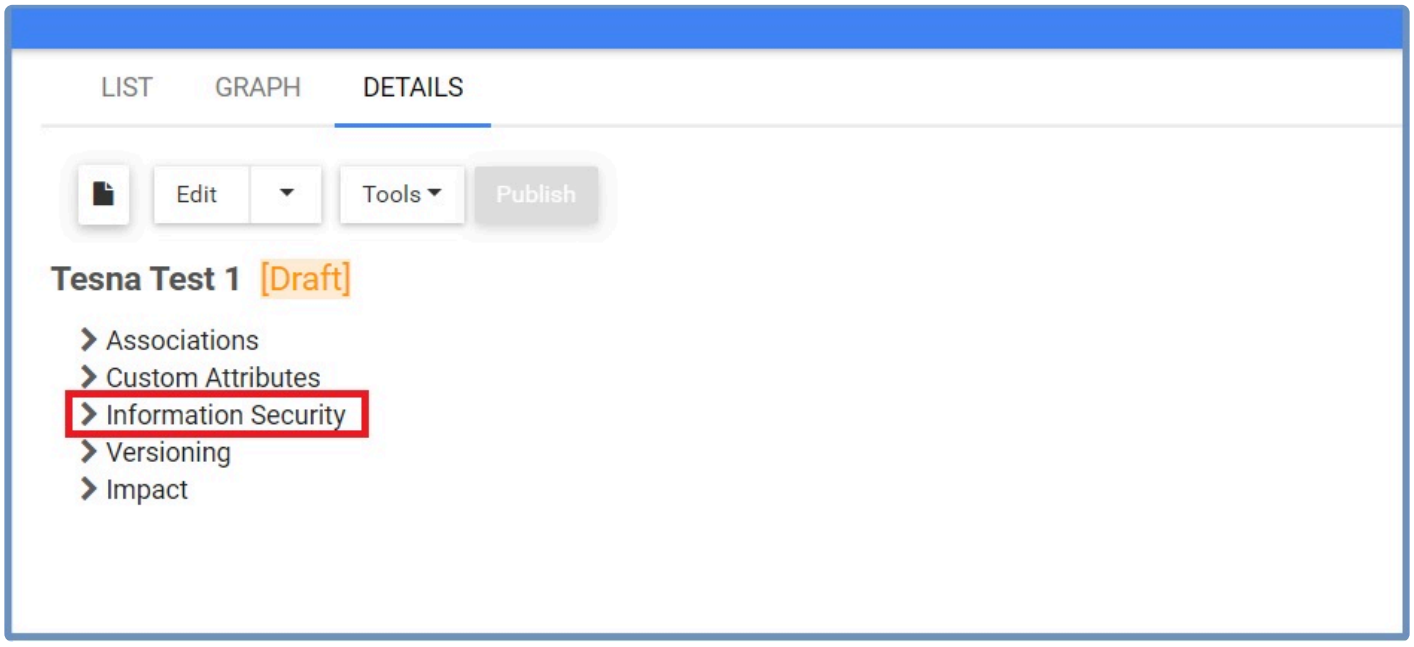
Environment

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

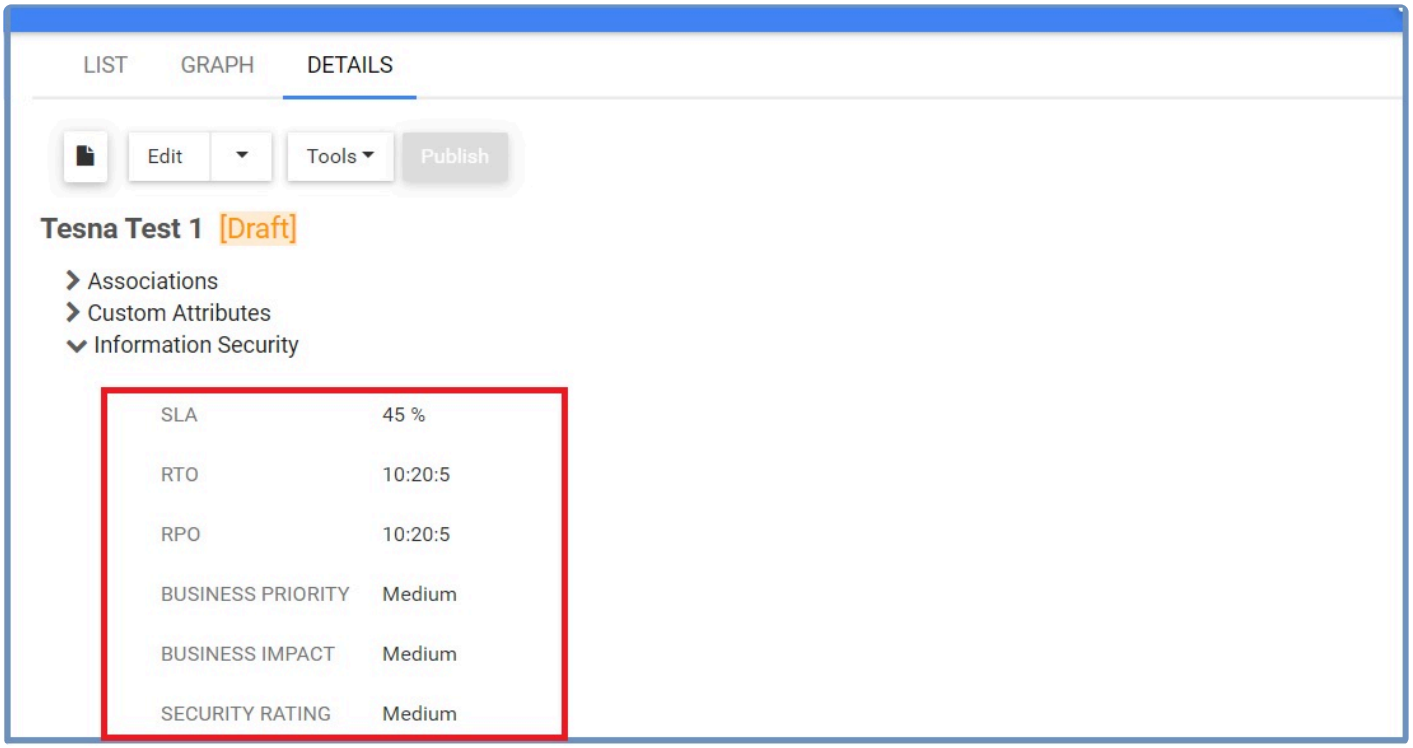
Life Cycle Status

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

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



The User can view only the not-empty attribute from the **Information Security** section of the detail page.


LIST
GRAPH
DETAILS
Edit
Tools
Publish
Tesna Test 1 [Draft]
Associations
Custom Attributes
Information Security
SLA 45 %
RTO 10:20:5
RPO 10:20:5
BUSINESS PRIORITY Medium
BUSINESS IMPACT Medium
SECURITY RATING Medium

12.4.3 Delete Organization Objects

Web Modelers can Delete Organization Objects if they have Delete security permission.

To learn how delete objects, click here

12.4.4 Publish Organization Objects

Once Web Modelers finished creating Organization Objects, they can publish it and allow all users with rights to view the objects.

To learn how to publish objects, click here

12.4.5 Organization Objects Approval Cycle

Web Modelers can set Approval Cycles on Organization Objects.

To learn how to set Approval Cycles, click here

12.4.6 Organization Objects Security

Web Modelers that are System Admins, Environment Admins, have Full Control Allow permission or have Read + Write + Delete Permission can set security permissions on Organization Objects.

To learn how to set security on an object, click here.

12.4.7 Move Organization Objects

Users can move Org Units, Roles, Resources and Assets within the Organization Module in the EPC.

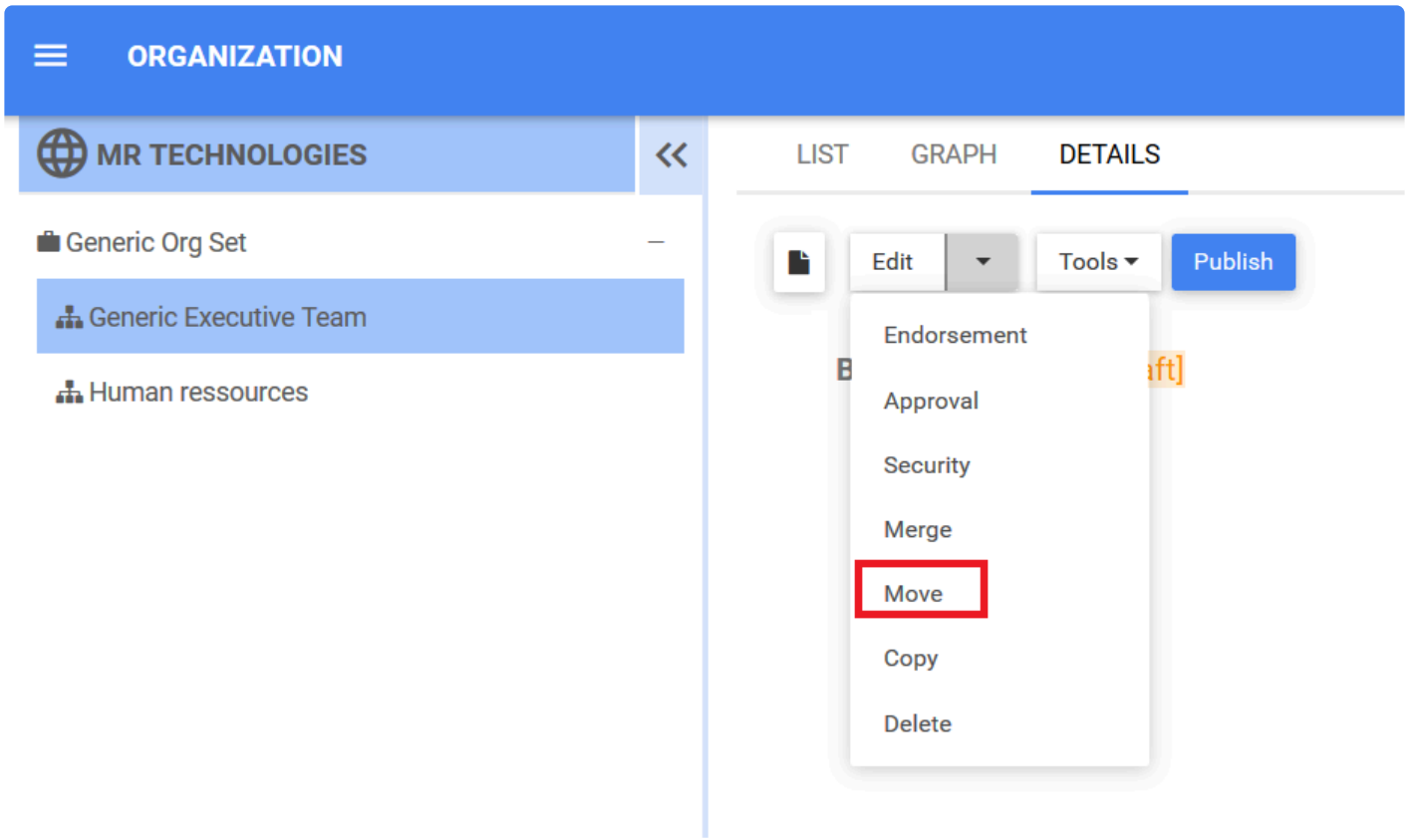
In Edit Mode, Org Units can be moved from:

1. Org Unit to Org Unit
2. Org Unit to Org Set (and Vice Versa)
3. Org Set to Org Set

Roles, Resources and Assets can be moved from

1. Org Unit to Org Unit

To move Organization Objects, navigate to the item's details page. Within the "Edit" dropdown, select "Move".



You can find further detail on Moving Objects in the EPC here.

12.4.8 Merge Organizational Objects

Users can merge similar objects in the EPC, allowing you to combine multiple objects into one. This action will allow you to remove duplicate items while maintaining their content and relationships in the application.

This capability is typically used in some of the following scenarios:

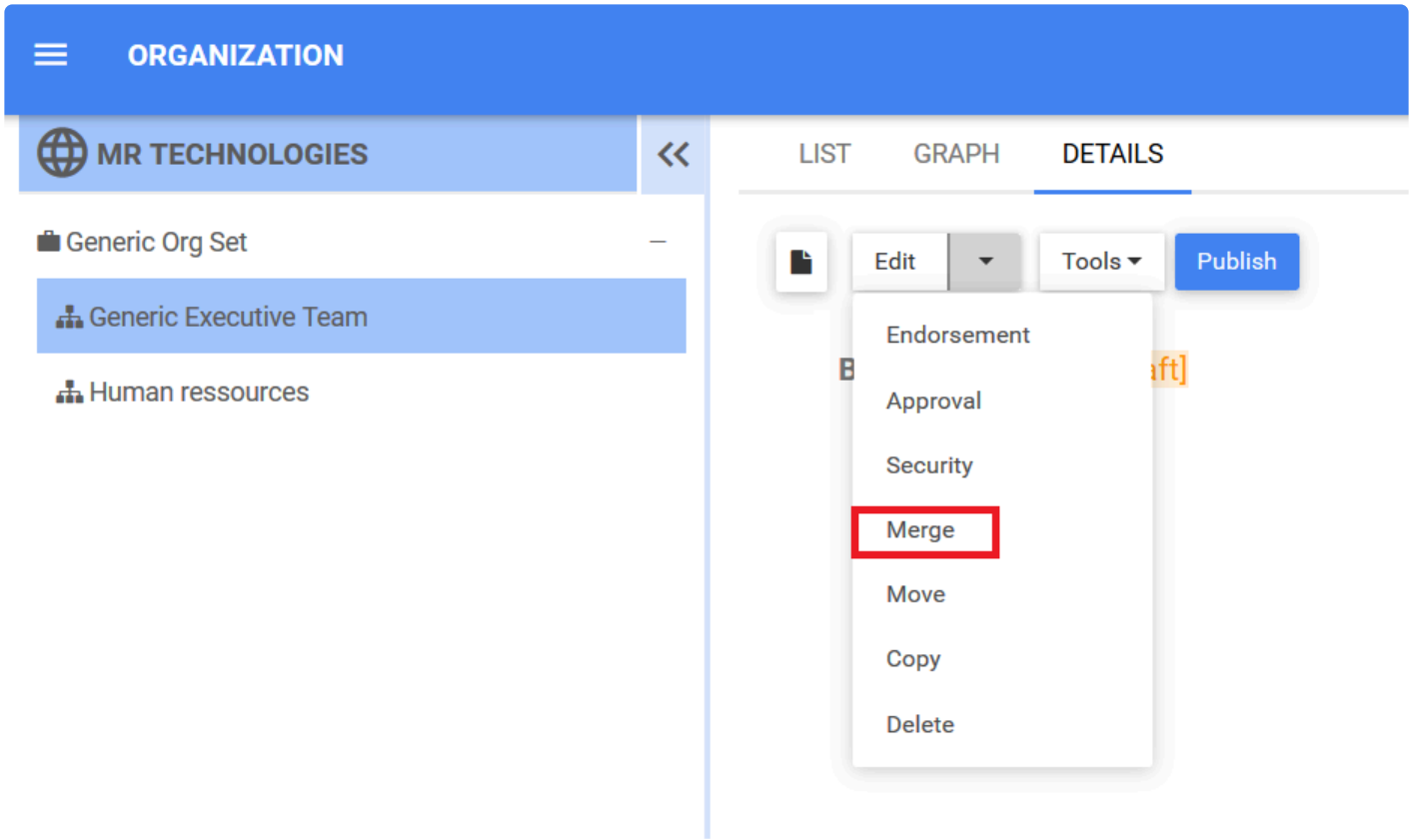
1. Remove duplicated items
2. Consolidate similar items
3. Adjust EPC content based on corporate restructurings and item re-definition

Within the Organization Module users can

1. Merge Org Units
2. Merge Roles
3. Merge Resources
4. Merge Assets

> Please note that you can only Merge identical objects (i.e. KPIs can be merged with other KPIs, Objectives can be merged with other Objectives)

Users can find this feature on the details page of items. For further instructions on how to use our **Merge** feature, please see the work instructions here.


ORGANIZATION
MR TECHNOLOGIES
Generic Org Set
Generic Executive Team
Human ressources
LIST
GRAPH
DETAILS
Edit
Tools
Publish
Endorsement
Approval
Security
Merge
Move
Copy
Delete

12.4.9 Generate Organization Books

Your EPC now features object book generation, allowing you to leverage your EPC to dynamically create object specific reports and documents. After your editors have created and uploaded document templates you can now uses these templates for the following modules:

These reports can be generated at:

a) The object level – allowing you to create reports about a specific object

b) The folder, process or org unit level – allowing you to create reports about objects INCLUDING there child objects

c) The Set level – allowing you to create large, summary documents including their child objects

For more information on how to generate object books, click here

12.4.10 Organization Object Endorsement Cycle

Web Modelers can set Endorsement Cycles on Organization Objects.
To learn how to set Endorsement Cycles, click here

12.5 Documents Edit

The Document Module of the EPC allows users to store all relevant documents to an organization's business activities on a centralized, secured, and manageable repository.

Web Modelers can add Document objects to the EPC Web App and use EPC's Document hierarchy with Document sets and Document folders as an organization tool. Web Modelers can choose a structure to classify documents in a manner that best suits the organization's needs.

The different Document objects can be Document Sets, Document Folders, and Documents (File, URL, File link)

The Document Edit section will cover the following:

1. Creating New Document Objects
2. Editing Document Objects
3. Deleting Document Objects
4. Publishing Document Objects

12.5.1 Create Document Objects

Web Modelers can create new Document Objects on the Web App. These objects can be Document Sets, Document Folders and Documents, such as Files, File Links, and URLs. Web Modelers can create new Document objects by clicking on the button NEW or directly through the Details Page of a Document Set or Document Folder.

The Create Document Objects section will cover the following:

1. Create a Document Set
2. Create a Document Folder
3. Upload a Document

12.5.1.1 Create a Document Set

Document Sets link and store all documents within the organization's database. Document Sets enable Web Modelers to organize an organization's documents in a hierarchical structure, and have a centralized repository.

Web Modelers can create new Document Sets on the WebApp.

To Create a New Document Set, please follow the Create Sets instructions.

12.5.1.2 Create a Document Folder

A Document Folder contains all of the documents uploaded to the document repository. Web Modelers arrange Document Folders in a manner that is the most appropriate to the organization's structure and use them as organization tools.

Document Folders are found within a Set or Folder (as a sub-folder) and are arranged in a hierarchical structure to simplify navigation and organization. It is recommended to organize Document folders by having Folders for each Organization Unit or Folders for each Value Stream/Process.

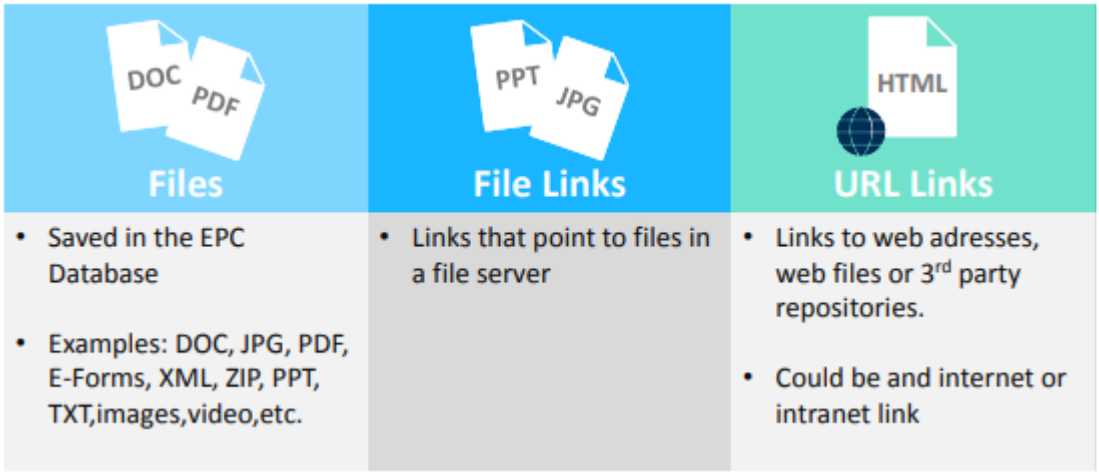
Web Modelers can create new Document Folders on the WebApp.

To create Document Folders, please follow Create Folders instructions.

12.5.1.3 Create a Document

Unlike other EPC objects, Documents are not created within the EPC Web App. Documents are uploaded from your local system to the EPC document repository. For this reason, any kind of file, file link, or URL can be added to the document repository.

The different types of basic Documents are:



Web Modelers can upload Documents on the WebApp and organize them within Document Folders.

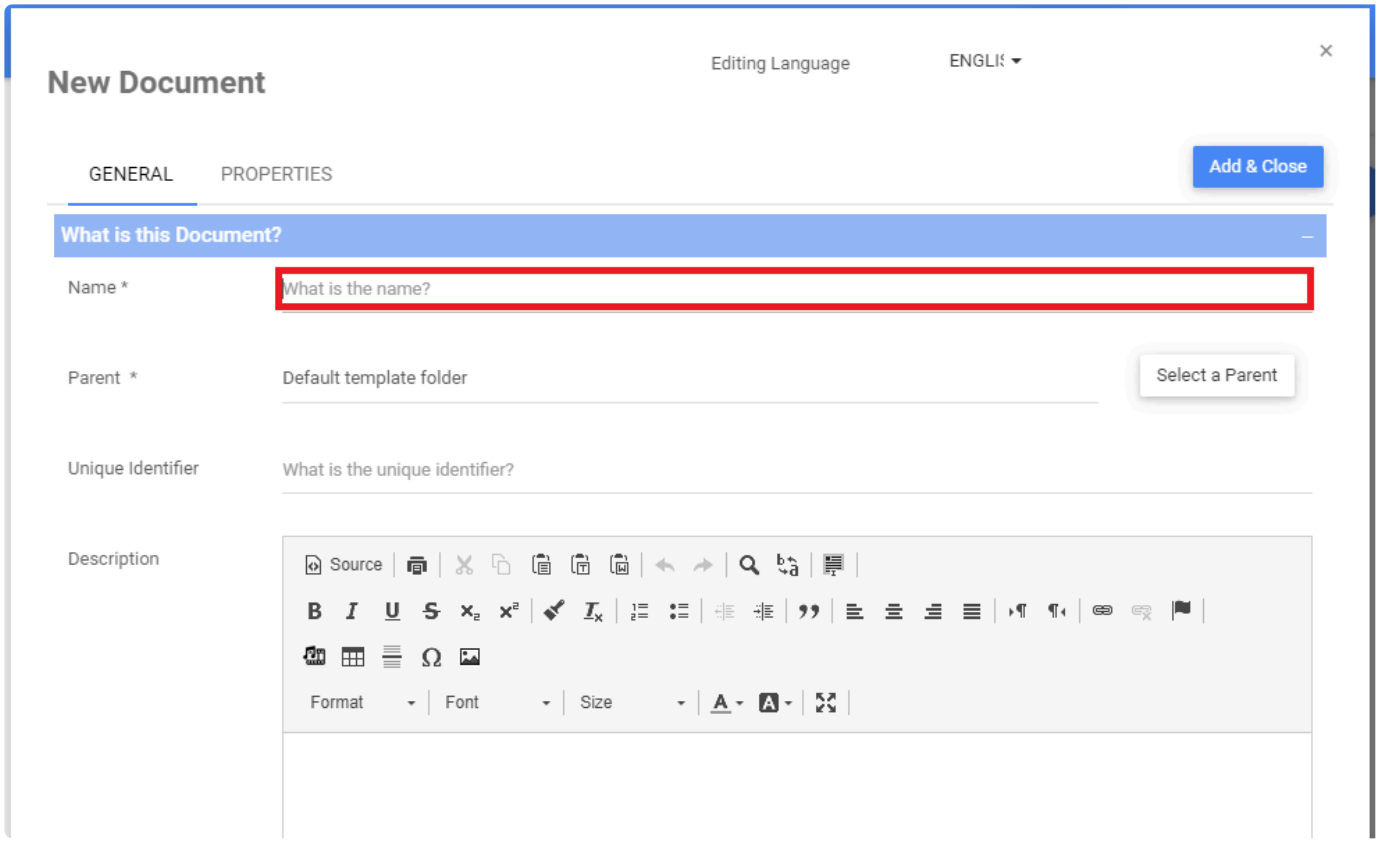
For instructions on how to create a new Document, see the Create Objects section.

Filling out a New Document form

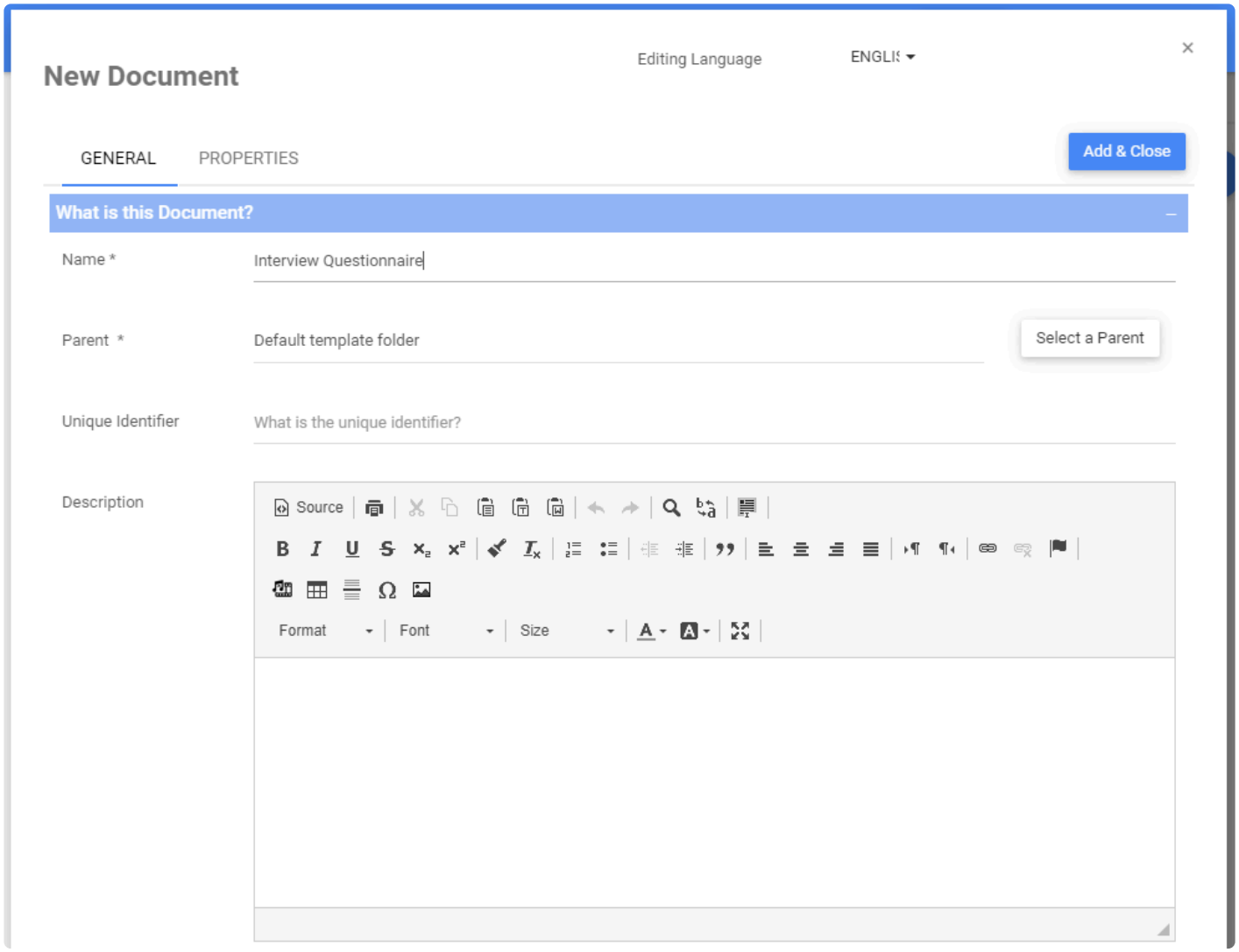
> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

1. Type the name of the Document on the “What is the name?” field

> It is **mandatory** for Web Modelers to input a name for the Document



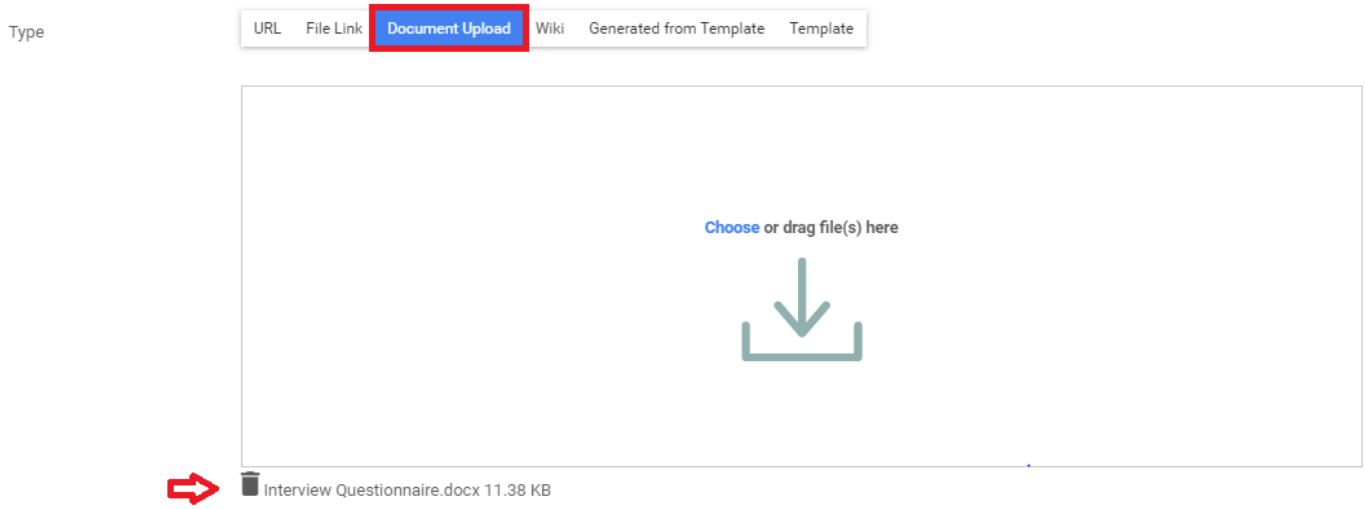
For this example, the name of the Document is “Interview Questionnaire”



The EPC automatically assigns the Folder as the Parent, which is the Document folder or sub-folder you selected. The Parent field is blocked and cannot be edited.

2. Choose the type of Document and upload it

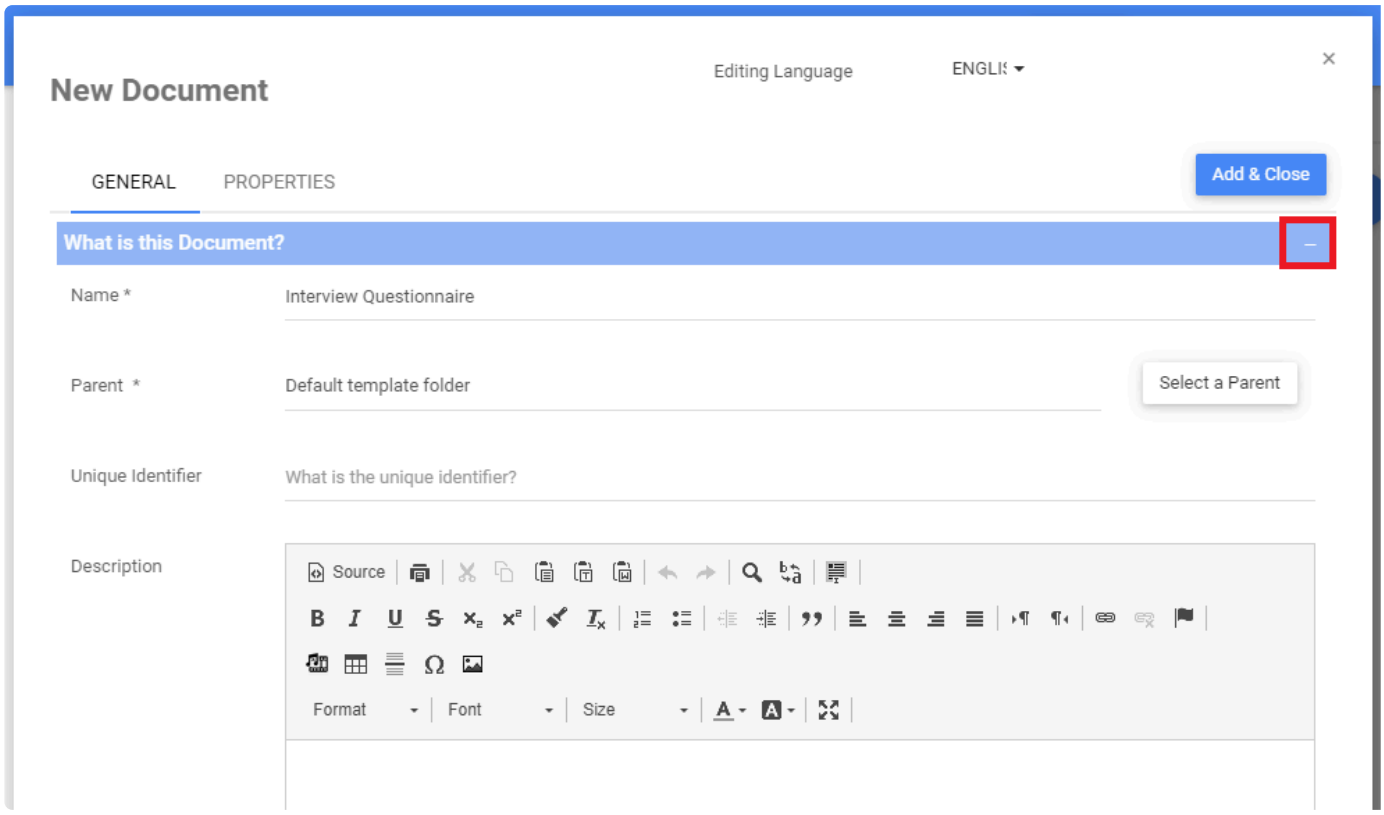
To learn how to upload Documents, click here



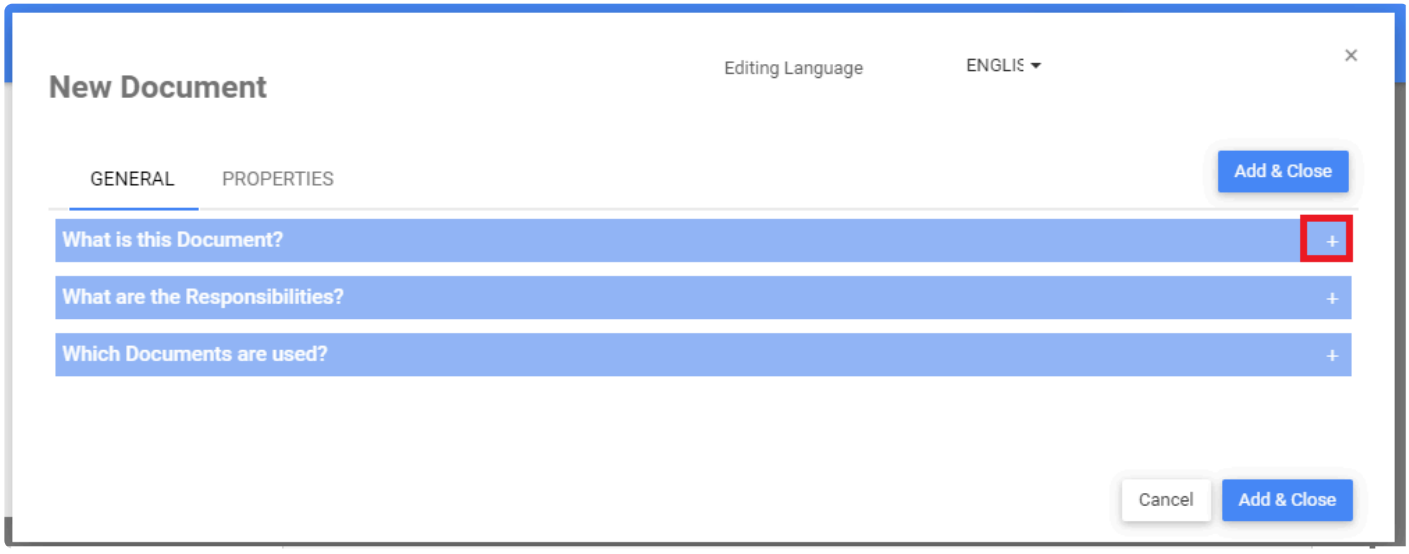
3. Use the + and − icons to expand and hide the different sections within each tab of the New Document Window. Input the right information about the Document in each section.

> The new Document window has two tabs, General and Properties. Under each tab there are different sections where the Web Modeler can input detailed information about the Document. To learn more about about each section and how to input information, click here

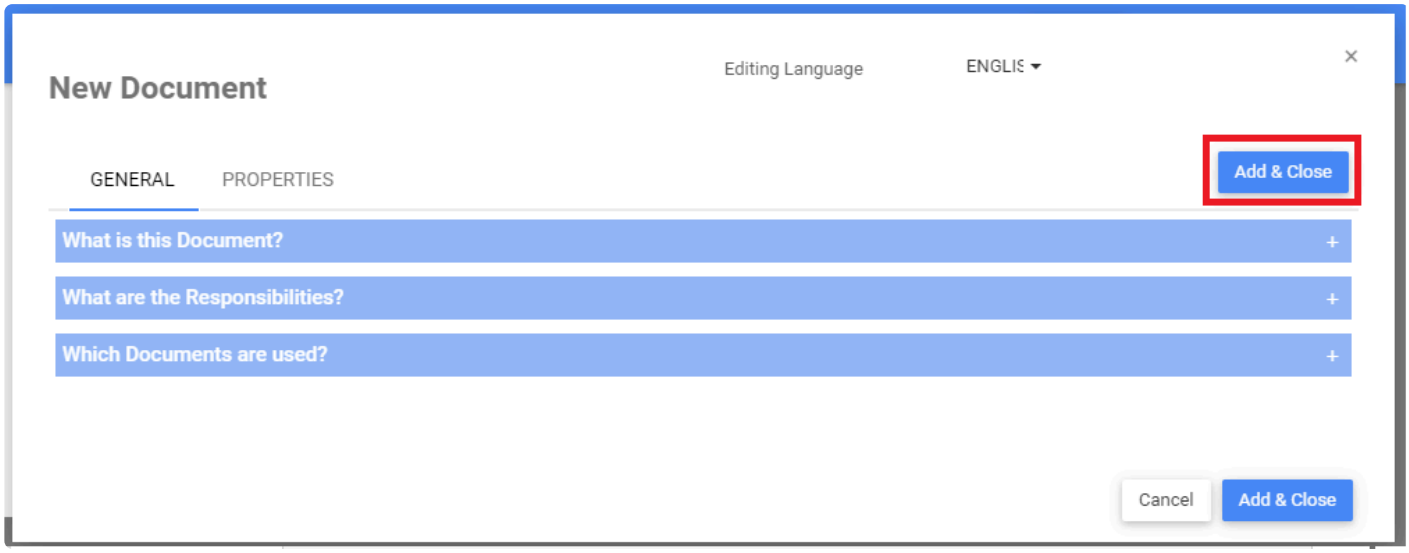
i) To hide sections, click on the − icon:



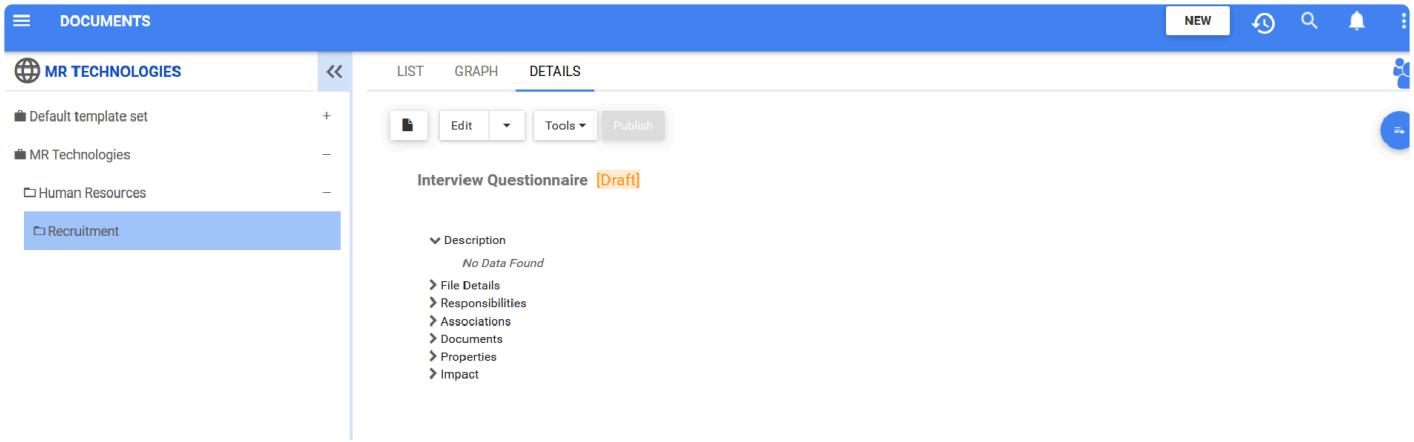
ii) To expand sections, click on the + icon:



4. Click on the button Add & Close to create the Document



5. The new Document “Interview Questionnaire” is now inside of the “Recruitment” Document Folder. This Document is currently a draft. To learn how to publish Document objects, click here.


DOCUMENTS
NEW
MR TECHNOLOGIES
LIST
GRAPH
DETAILS
Default template set
MR Technologies
Human Resources
Recruitment
Edit
Tools
Publish
Interview Questionnaire [Draft]
Description
No Data Found
File Details
Responsibilities
Associations
Documents
Properties
Impact

12.5.1.3.1 Uploading Multiple Documents (Mass Upload)

12.5.1.3.2 Compatible Document Types

Compatible File Types for Document Upload

Most file types can be uploaded into the EPC using the Document Upload feature.

List of compatible document types:

- .docx
- .doc
- .ppt
- .pptx
- .xls
- .pdf
- .xlsx
- .png
- .jpeg
- .gif
- .mp4
- .avi
- .html
- .zip

The preview feature will only be available for readable formats, such as .doc/x, .ppt/x, .xls/x, .pdf, .jpeg, etc

Compatible File Types for Templates

The EPC uses the docxtemplater to generate template based documents. As such, the only format used to upload templates should be in .docx format.

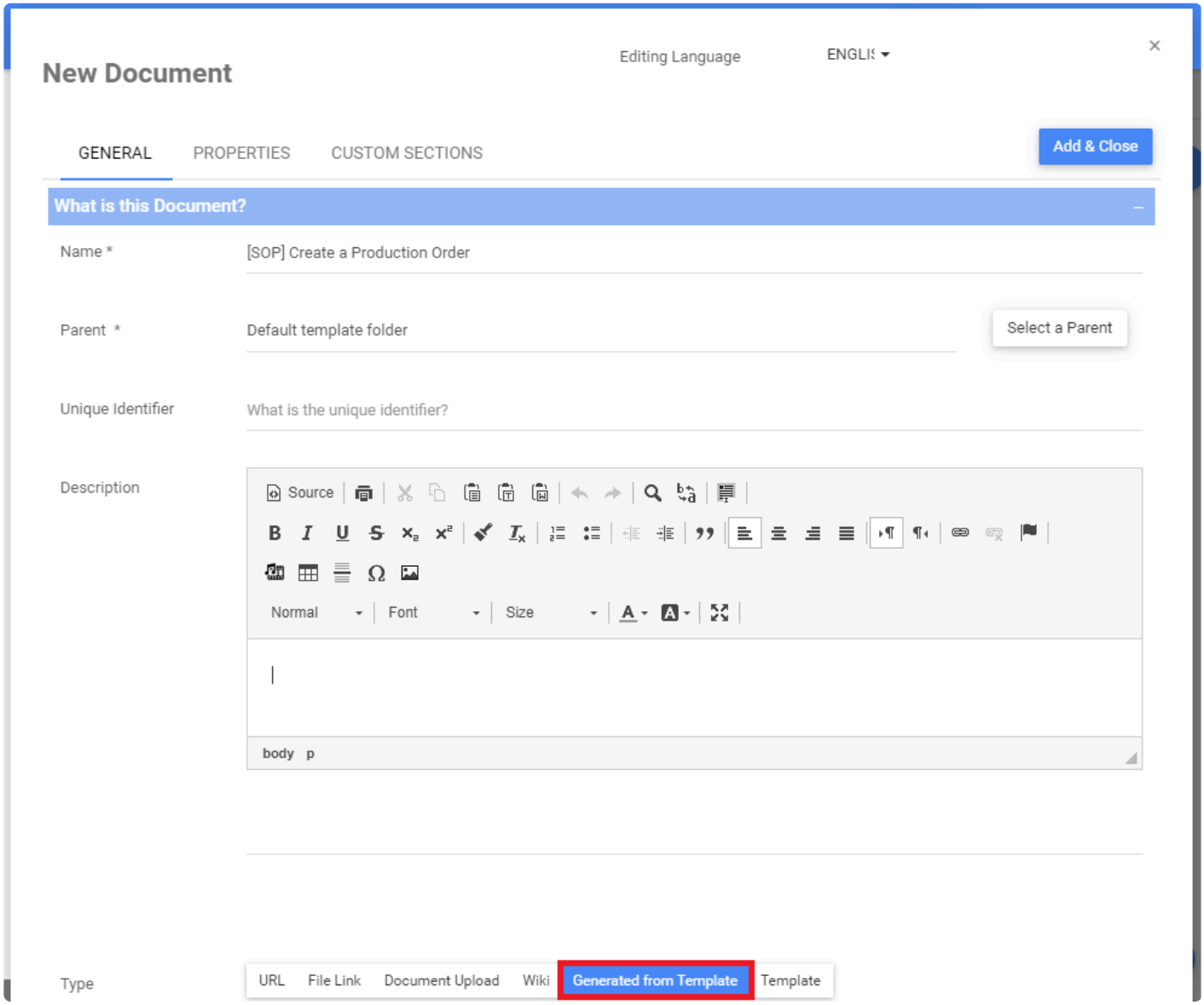
For more information on templates, please see Creating a Template

12.5.1.3.3 Generated from Template

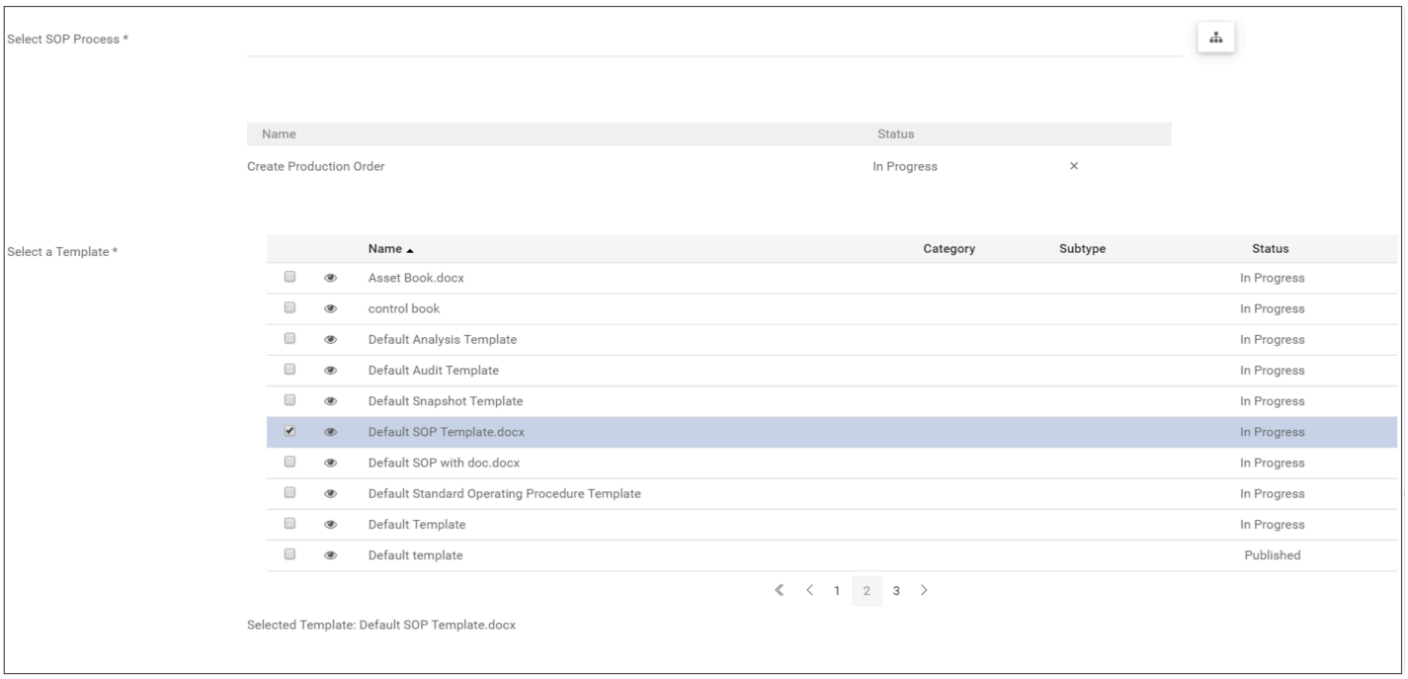
Generated from Template documents are a special type of documents that allow users to generate Standard Operating Procedures using a template and a process. It can be used to generate various custom documents depending on the chosen template.

Creating a Generated from Template document

1. Create a new document and select **Generated from Template** as the type. Refer to the section on document creation for more details



2. Select a process that will be used to generate the document. The content of the document will be populated with information from the selected process. After selecting the process, choose a template that the document will be generated from.



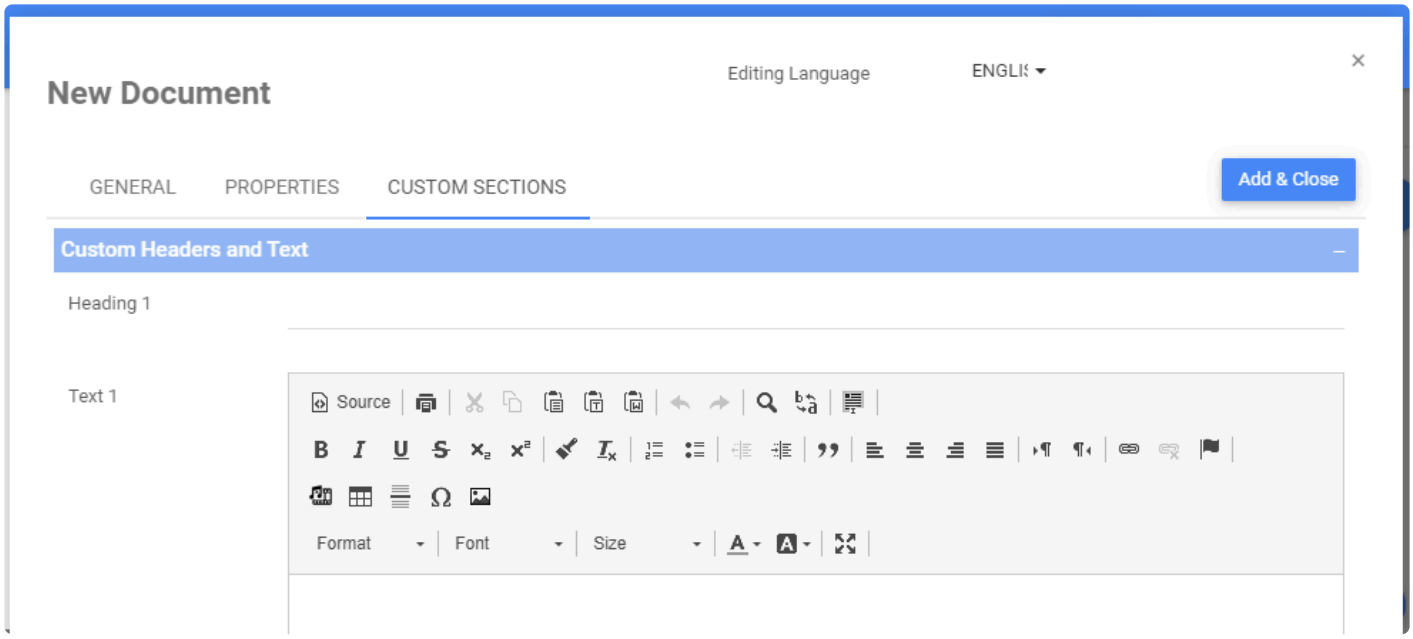
3. Save the document

> You can add associations, type, category and UDAs to Generated from Template documents.

Custom Sections

There is a third tab labelled “Custom Sections”. This allows users to enter headers and custom richtext that will be injected into the resulting output. This feature can be used as an alternative to hard-coding content in the templates when generating a Standard Operating Procedure. Static content can be put in these section and quickly modified depending on business needs.

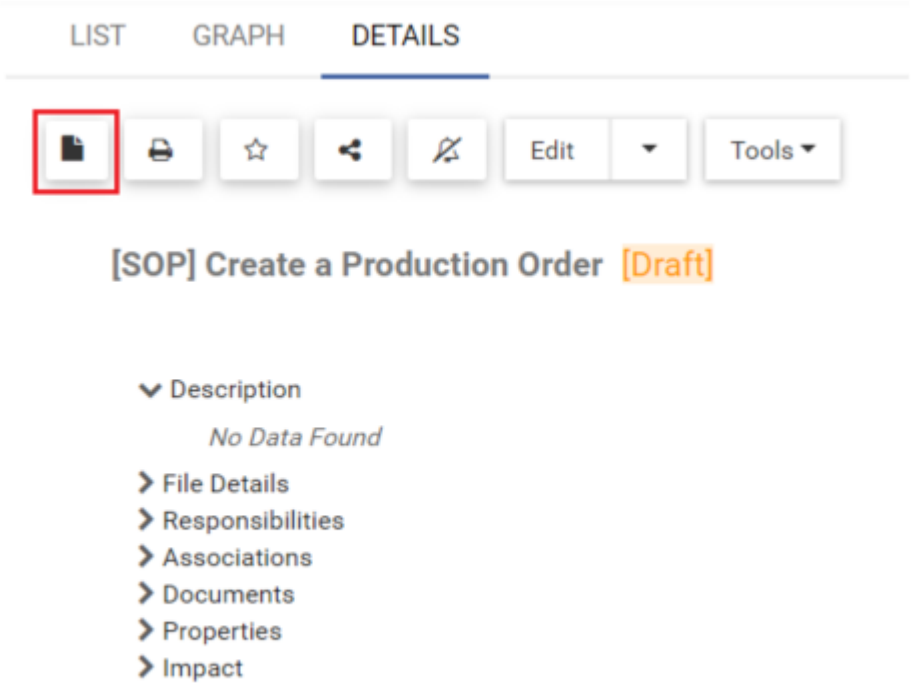
> Tags must be inserted inside the template to inject these custom content. Refer to the Generated from Template Tags for more information. If you do not see the content entered in this tab in the output, ensure the tags corresponding to the header/text section is present in the template.



Generating the Document

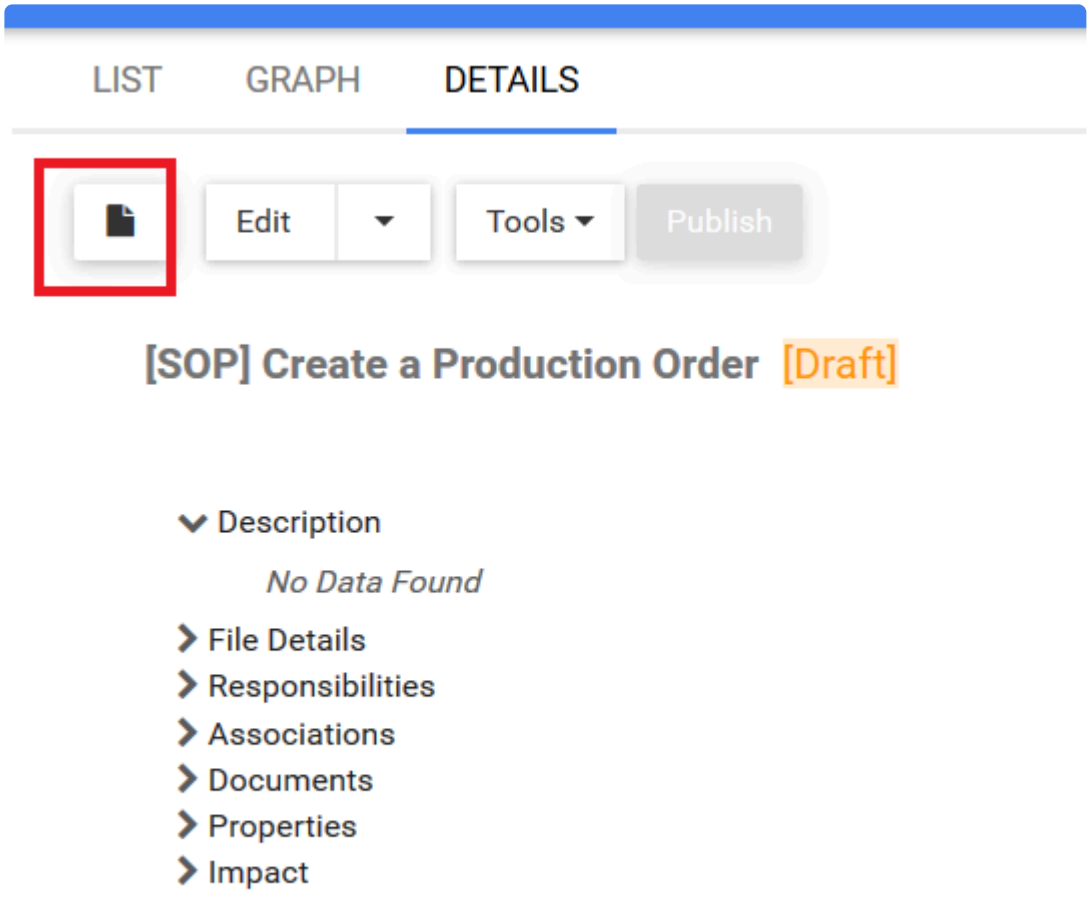
To generate the document, make sure you are on the Generated from Template details or graph page

1. Click on the **Generate from Template** button



2. The document will be downloaded directly to your computer

If the process is large, this may take a few minutes.



12.5.1.4 Creating a Template

Users are able to create their own customizable templates to use when generating Process Books, Object Books or Standard Operating Procedures. This allows them to only include information they need and to adapt various templates to different formats and purposes.

The EPC uses the Docxtemplater library for SOP generation within the web application. Refer to the Docxtemplater library for documentation and for how-to's. Note that the EPC does not use the commercial version of Docxtemplater.

> Upload templates in a folder dedicated for templates for easier management.

Note that templates are environment locked; users are not able to use nor see templates uploaded into an environment of which they are not a part of.

Creating a template

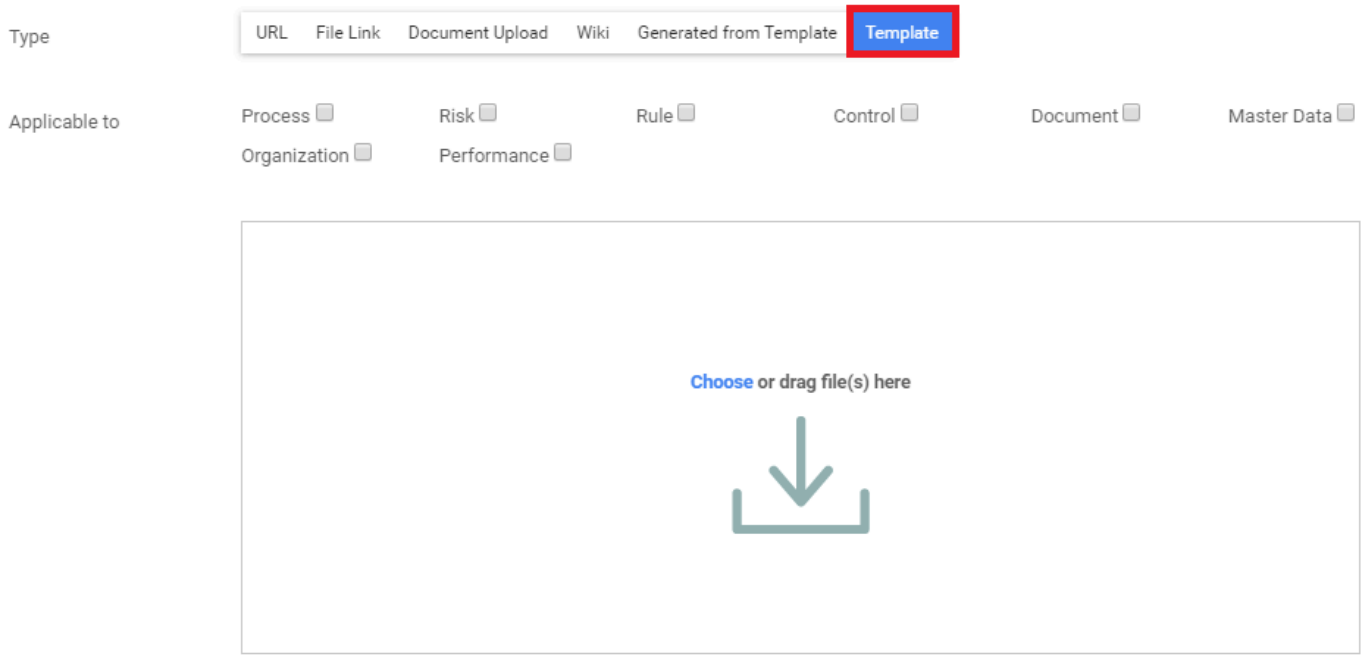
To create a template for custom document generation, Microsoft Office Word is required, as templates must be uploaded in the EPC as a .docx file.

For more information on how template tags work and how to include them, refer to Template Tags

Uploading a template

Once the template has been created, it can uploaded into the EPC similarly to other documents. Refer to Create Objects for information on creating objects within the EPC

The document type must be template. This is how the EPC identifies templates.



Drag a file or click on the upload space to select a document. Once the document has been successfully uploaded, click on Add.

Once the template has been uploaded, the user will be able to use that template to generate documents.

Default Templates

Default Templates are provided to you to download at this following link: EPC Template Downloads

12.5.1.4.1 Template Syntax

Documentation adapted from https://docxtemplater.readthedocs.io/en/latest/tag_types.html#sections

Tags are close between curly brackets. For example, given (in .docx):

```
This Procedure is for {name}
```

And the data (in .json)

```
{
     "name": "Sales Process"
}
```

The output in the .docx will be

```
This Procedure is for Sales Process
```

Sections

Sections begin with a pound (#) and end with a slash (/). For example, {#process} begins a “process” section while {/process} ends it.

Depending on the type of the data, sections will behave differently.

Type of Data	Behaviour	Scope
boolean	Conditional – section is shown if true	unchanged
empty array	Section not shown	–
non empty array	For each element of the array	element of the array
object	Section is displayed once for the object	object

Conditionals

Conditionals start with a pound (#) and end with a slash (/). Conditionals can be used to show content based on a whether an attribute is true or false.

Given this syntax in the template (.docx)

```
This role is {#responsible}Responsible{/responsible}{#accountable}Accountable{/accountable}
```

And this data (.json)

```
{
     "responsible": false
     "accountable": true
     "name": "Accounting Clerk"
}
```

The following will be rendered

```
This role is Accountable
```

In addition to using free text, you can also use tags within conditional statements to dynamically display information. For example, give this syntax:

```
Who is responsible for this task? {#accountable}{name}{/accountable}
```

And the same data given above, the following will be rendered

```
Who is responsible for this task? Accounting Clerk
```

If we had replaced `{#accountable}...{/accountable}` with `{#responsible}...{/responsible}`, “Accounting Clerk” would not have been printed, since responsible is false.

Loops

The syntax for loops and conditionals are the same. Loops should be used where data is stored in arrays. Given this syntax (in .docx):

```
{#rules}
     {name}
{/rules}
```

and the following data (in .json)

```
{
     "rules":[
          { "name": "Perform Background Checks" },
          { "name": "Sign Contract on First Day" },
```

```
            { "name": "Change Employee Passwords every 3 Months" }
      ]
}
```

The rendered output will be:

```
Perform Background Checks
Sign Contract on First Day
Change Employee Passwords every 3 Months
```

Inverted Sections

Inverted sections start with a caret (^) and ends with a slash (/). An inverted section is essentially an else statement. Give this syntax (in .docx)

```
{#goal}goal{/goal}
{^goal}No goal  has been defined{/goal}
```

and this data (in .json)

```
{
      "goal": null
}
```

The following output will be rendered

```
No goal has been defined
```

12.5.1.4.2 EPC Tag Structure

Once the user has opened up a Word document, tags must be added in order for information from a process or object to appear in the document being generated. The syntax used to include the tags can be found at https://docxtemplater.com/. This section will explain how to use the syntax with the appropriate tags.

Where Does the Information Come From?

When an user generates a document the tags in the Word document are replaced with information coming from the EPC.

For example, if the user wishes to include the version of the process, the tag {version} must be inserted into the Word document. When the SOP is generated, the EPC will find the {version} tag and replace it with the appropriate version number.

Data Structure

The data is structured in a specific manner. The proper syntax and logic must be used to ensure the right output. See below for the general data structure.


```
▼ {
  ▼ "templaterConfig": {
    ▼ "subject": {
      ▶ "object": { … }, // 78 items
        "versions": [],
        "approvalEntries": [],
      ▶ "properties": [ … ], // 10 items
      ▶ "impact": { … }, // 17 items
        "nodes": null,
      ▶ "improvementRequests": [ … ] // 1 item
      },
      "includeChildren": false,
    ▶ "templateDocument": { … }, // 60 items
      "templateContent": "UEsDBBQABgAIAAAAIQAJJIeCgQE
  ▼ "objects": [
    ▼ {
      ▶ "object": { … }, // 78 items
        "versions": [],
        "approvalEntries": [],
      ▶ "properties": [ … ], // 10 items
      ▶ "impact": { … }, // 17 items
      ▶ "nodes": [ … ], // 7 items
      ▶ "improvementRequests": [ … ] // 1 item
      }
    ]
  }
```


Object	Level	Parent	Type	Description

templaterConfig	1	N/A	Object	This top level object will contain information on the subject on which the document is being generated on and the template being used to generate the document
objects	1	N/A	Array	The data for objects such as rules, risks, controls, documents, etc, will be in this top level array when the user generates an document. The array can contain multiple objects
subject	2	templaterConfig	Object	The subject object contains the various properties relating to the EPC object you are generating a document on (name, version history, attributes, impacts, etc.)
templateDocument	2	templaterConfig	Object	The templateDocument object contains information about the template being used to generate the document
object	3	subject, objects array	Object	Base information like name, current version and associations of the EPC object
versions	3	subject, objects array	Array	Version history of the EPC object
approvalEntries	3	subject, objects array	Array	Approval entries/history of the EPC object
properties	3	subject, objects array	Array	User defined attributes of the EPC object
impact	3	subject, objects array	Object	Impacts of the EPC object
nodes	3	subject, objects array	Array	Flow Object information in the process (only for documents being generated on processes)
improvementRequests	3	subject, objects array	Array	Improvement Requests on the EPC object

The last 7 elements (object, versions, approvalEntries, properties, impact, nodes, improvementRequests) constitute an EPC object. For example, if a document is being generated on a process:

- **object**: base information on the process and its associations
- **versions**: the version history of the process
- **properties**: the UDAs their values related to the process
- **impact**: impacts of the process
- **nodes**: flow object base information and associations within the process
- **improvementRequests**: improvement requests raised on the process

In this case, we could use “object” to output the name and description of the process. “version” could be used to print the version history of the process. “nodes” would print the name and description of the flow objects within the process. Those 6 elements constitute a “block” of properties that define an EPC object. This block can be repeated multiple times if a document is being generated to include sub-items (such as all documents within a folder)

Which EPC objects is included where will be based on the context of the document generation. The table below explains which object(s) will be included under templaterConfig/subject and objects

templaterConfig/subject will always only have 1 object under it, whereas objects is an array and can have multiple objects. If sub-items are not included, the content in templaterConfig/subject vs objects will be the same. The table assumes that sub-items are always included.

Document Generation On	templaterConfig/subject	objects
Process	Contains: only the main process	Contains: main process + all sub processes
Set (any)	Contains: only the set	Contains: all objects under the Set excluding folders
Folder (any)	Contains: only the folder	Contains: all documents under the folder
Objective	Contains: only the objective	Contains: The objective + child objectives, KPIs, KRIs, KCIs under the objective
KPI, KRI, KCI	Contains: only the indicator	Contains: The indicator + child indicators
Org Unit	Contains: only the org unit	Contains: the org unit + child org objects
Any EPC Object with no sub-items*	Contains: only the EPC object	Contains: only the EPC Object

*EPC objects without sub-items include documents, roles, assets, resources, risks, controls, rules, entities and attributes.

Displaying Information

To display information, the name of the object from which we want the information from must be specified. Referring to to the block of code above, if we want the name of the role associated to a process, we have to specify from which object it is coming from. However, that object can also belong to another object at a higher level, which also must be specified. In the example below, we specify from the top level object down to the object property we want printed.

```
{#objects}{#object}{name}{/object}{/objects}
```

12.5.1.4.3 Cover Pages

Users can easily create their own stylized cover pages to suit business needs.

To create a cover page:

1. On the first page of the Word Document, insert a section break (disregard if there is already one)

2. Open a section for templaterConfig, then subject, then the object itself
{#templaterConfig}{#subject}{#object}

```
{#templaterConfig}{#subject}{#object}

{name}

{version}

{/object}{/subject}{/templaterConfig}
```

3. Insert the desired tags (refer to the table below) within the loop. Close the object, subject and templaterConfig loops {/object}{/subject}{/templaterConfig}

4. Insert images and change fonts to your liking

{#templaterConfig}{#subject}{#object}

Process Book

{name}

interfacing.

{version}

{/object}{/subject}{/templaterConfig}

Cover Page Tags

Some commonly used tags are listed below; refer to the General Tags section for the full list of tags.

Tag Name	Description
{nodeType}	The object type (PROCESS, RULE, RISK, CONTROL, etc…)
{name}	The name of the object
{version}	The version of the object
{creationDate}	The creation date of the object
{modificationDate}	The modification date of the object
{userSubTypeName}	The type of the object

Output Example

Given the above example, the generated output will look like this:

The Name and Version tags have been replaced with the appropriate values.

12.5.1.4.4 Custom Document Tags

Users can generate object books on the following EPC Objects:

- Process
- Performance (Objective, KPI, KRI, KCIs)
- Organization (Org Unit, Resources, Assets, Roles)
- Documents
- Risks
- Controls
- Rules
- Master Data

High Level Tags

The table below is a recap of the 6 elements that constitute an EPC object (process, risk, control, etc).

Element	Description
object	An object that contains the base information of the risk, rule, etc and its associations
versions	The version history of the object
approvalEntries	Approval Cycles and comments associated to the object
properties	The UDAs (user-defined attributes) of the object
impact	The impact list of the object
nodes	Flow objects within the process

This block of 6 elements can be found in 2 locations:

1. Under templaterConfig -> subject.
2. Under the objects array. This block can repeat multiple times in the objects array if the document is being generated on multiple items.

```
▼ {
  ▼ "templaterConfig": {
    ▼ "subject": {
      ▶ "object": { … }, // 78 items
        "versions": [],
        "approvalEntries": [],
      ▶ "properties": [ … ], // 10 items
      ▶ "impact": { … }, // 17 items
        "nodes": null,
      ▶ "improvementRequests": [ … ] // 1 item
      },
      "includeChildren": false,
    ▶ "templateDocument": { … }, // 60 items
      "templateContent": "UEsDBBQABgAIAAAAIQAJJIeCgQE
  ▼ "objects": [
    ▼ {
      ▶ "object": { … }, // 78 items
        "versions": [],
        "approvalEntries": [],
      ▶ "properties": [ … ], // 10 items
      ▶ "impact": { … }, // 17 items
      ▶ "nodes": [ … ], // 7 items
      ▶ "improvementRequests": [ … ] // 1 item
      }
    ]
  }
```


All tags in the subsequent sections will be wrapped around either templaterConfig or objects (see below).

templaterConfig

To access the object under templaterConfig (the base object on which you are generating a document on; e.g. a document folder), you must specify the location of the property you want to print. To print the name of the documents folder, you would need to write the following:

```
{#templaterConfig}{#subject}{#object} {name} {/object}{/subject}{/templaterConfig}
```

Note that templaterConfig/subject contains the same 6 elements (object, versions, approvalEntries, properties, impact and nodes) as the objects array. The syntax is therefore the same for this section and the “Objects” section of the help manual. Considering the example above, you could also print out the version history of a document folder (remember that templaterConfig contains the data of the object you are generating a document on):

```
{#templaterconfig}{#subject}{#versions} {version} {/versions}{/subject}{/templaterConfig}
```

Alternatively, if you were to print the version history of the documents inside the document folder (while templaterConfig contained data for the documents folder, objects will contain the data for all the documents themselves):

```
{#objects}{#version} {version} {/versions}{/objects}
```

Notice that the only thing that changes between templaterConfig/subject and objects are the opening sections. {#versions} {version} {/versions} follows the same syntax regardless of the context.

> Use the templaterConfig and subject section for cover pages, Generated from Template or when you just want the 1st level object you are generating a document. For any other purpose, use the objects array (explained below).

Objects

The body of your template should use the objects array. The example below is for a template that will print the name, version and description of an EPC object:

```
{#objects}{#object} //Opening a section for objects, then looping through the obj
ect array to print all elements within the array
{name} //The name of the EPC object
{version} //The version of the EPC object
@@richTextDescription:{nodeId}@@ //The description of the EPC object
{/object}{/objects} //Closing the object loop and the objects section
```

Note: The comments (//) are there for explanations – anything not enclosed by curly braces ({ }) will be printed in the resulting output.

Refer to the General Object Tags for a list of common tags to include inside templaterConfig/subject and objects. The remaining sections will explain module-specific tags.

12.5.1.4.4.1 General Object Tags

High Level Tags

Note that all examples in this page must be written inside a loop/section for objects or templaterConfig/subject

For example, if you want to access data within the “object” object:

objects:
```
{#objects}{#object} {name} {/object}{/objects}
```

templaterConfig/subject:
```
{#templaterConfig}{#subject}{#object} {name} {/object}{/subject}{/templaterConfig}
```

The same concept is applicable to the other 6 elements (version, properties, etc). They must be written inside a loop/section for objects or templaterConfig/subject

Object

The “object” object contains the base information and associations of the object. The properties and attributes of this object will depend on the type (for example, “defaultView” is an attribute specific to process). For tags relating to each EPC Object, refer to the page specific to that EPC Object.

All tags under this header (including associations – risks, rules, etc) must be within a section for object:

```
{#object} {name} {/object}
```

Tag	Description
{nodeType}	The type of node
{name}	The name of the object
{version}	The version of the object
{creationDate}	The date and time the object was created
{modificationDate}	The date and time the object was last modified
{nodeStatus}	Status of the object (published vs in progress)
{checkinDate}	The date and time when the object was published
{checkinComment}	The comment associated with the publication for the object

{referenceNumber}	The object's unique identifier
{#parent}{name}{/parent}	Name of the object's parent
{#checkinBy}{username}{/checkinBy}	Username of the user who last published the object
{#checkinBy}{firstName}{/checkinBy}	First name of the user who last published the object
{#checkinBy}{middleName}{/checkinBy}	Middle name of the user who last published the object
{#checkinBy}{lastName}{/checkinBy}	Last name of the user who last published the object
{#checkinBy}{name}{/checkinBy}	Full name & username of the user who last published the object
{#checkinBy}{email}{/checkinBy}	Email of the user who last published the object
{#checkinBy}{phone}{/checkinBy}	Phone Number of the user who last published the object
{checkinComment}	Comment made by the publisher of the object (current version)

Associated Roles & Responsibilities Tags

The tags in the table below are tags common across org units, resources, assets and roles.

Each of the tags above must be included within the appropriate loop

- Roles: {#roles}{/roles}
- Org Units: {#orgUnits}{/orgUnits}
- Resources: {#resources}{/resources}
- Assets: {#assets}{/assets}

> The loop must be inside the object section

```
{#object}{#roles}{#target} {name} {/target}{/roles}{/object}
```

Tag	Description
{#target}{name}{/target}	Name of the org unit, role, asset or resource
{#target}{version}{/target}	Version of the org unit, role, asset or resource
{#target}{nodeType}{/target}	The type of the object (role, resource, asset, org unit)
{#target}{creationDate}{/target}	Date of creation of the org unit, role, asset or resource
{#target}{modificationDate}{/target}	Last modification date of the org unit, role, asset or resource

{#target}{nodeSubTypeName}{/target}	The type of org unit, role, asset or resource
{#target}{nodeStatus}{/target}	The status of the org unit, role, asset or resource (in progress vs published)
{#target}{checkinDate}{/target}	The date of publication of the org unit, role, asset or resource
{#target}{#checkinBy}{username}{/checkinBy}{/target}	The username of the user who last published the object
{#target}{#checkinBy}{firstName}{/checkinBy}{/target}	The first name of the user who last published the object
{#target}{#checkinBy}{middleName}{/checkinBy}{/target}	The middle name of the user who last published the object
{#target}{#checkinBy}{lastName}{/checkinBy}{/target}	The last name of the user who last published the object
{#target}{#checkinBy}{name}{/checkinBy}{/target}	The full name and username of the user who last published the object
{#target}{#checkinBy}{email}{/checkinBy}{/target}	The email of the user who last published the object
{#target}{#checkinBy}{phone}{/checkinBy}{/target}	The phone number of the user who last published the object
{#target}{reviewFrequency}{/target}	The set review frequency of the org unit, role, asset or resource
{#target}{nextReviewDate}{/target}	The next review date of the org unit, role, asset or resource
{#target}{#categories}{name}{/categories}{/target}	The categories in which the object is grouped in
{responsible}	Boolean value for Responsible (RASCI-VS)
{accountable}	Boolean value for Accountable (RASCI-VS)
{support}	Boolean value for Support (RASCI-VS)
{consulted}	Boolean value for Consulted (RASCI-VS)
{informed}	Boolean value for Informed (RASCI-VS)
{verifier}	Boolean value for Verifier (RASCI-VS)
{signatory}	Boolean value for Signatory (RASCI-VS)

Associated Documents Tags

These tags can be used to display information about any documents associated to the object. The tags in

the section below must be included in a loop for documents:

The loop must be inside the object section

```
{#object}{#documents}{#target} {name} {/target}{/documents}{/object}
```

Tag	Description
{#target}{nodeType}{/target}	The type of object (document)
{#target}{name}{/target}	The name of the document
{#target}{version}{/target}	The version of the document
{#target}{creationDate}{/target}	The creation date of the document
{#target}{modificationDate}{/target}	The last modification date of the document
{#target}{nodeSubTypeName}{/target}	The type of document
{#target}{nodeStatus}{/target}	The status of the document (in progress vs published)
{#target}{referenceNumber}{/target}	The document's unique identifier
{#target}{checkinDate}{/target}	The date the document was published
{#target}{#checkinBy}{username}{/checkinBy}{/target}	The username of the user who last published the document
{#target}{#checkinBy}{firstName}{/checkinBy}{/target}	The first name of the user who last published the document
{#target}{#checkinBy}{middleName}{/checkinBy}{/target}	The middle name of the user who last published the document
{#target}{#checkinBy}{lastName}{/checkinBy}{/target}	The last name of the user who last published the document
{#target}{#checkinBy}{name}{/checkinBy}{/target}	The full name and username of the user who last published the document
{#target}{#checkinBy}{email}{/checkinBy}{/target}	The email of the user who last published the document
{#target}{#checkinBy}{phone}{/checkinBy}{/target}	The phone number of the user who last published the document
{#target}{reviewFrequency}{/target}	The set review frequency of the document
{#target}{nextReviewDate}{/target}	The next review date of the document

{#target}{#categories}{name}{/categories}{/target}	The category under which the document is grouped under
{#target}{documentType}{/target}	The type of document (URL, file, template, file link)
{#target}{url}{{/target}	The URL of the document (only for URL and file link types)
{#target}{#fileInfo}{name}{/fileInfo}{/target}	The name of the uploaded file (only for file uploads and templates)
{#target}{#fileInfo}{extension}{/fileInfo}{/target}	The extension of the file (only for file uploads and templates)

Associated Risks Tags

These tags can be used to display information about any risks associated to the process. The tags in the section below must be included in a loop for risks:

> The loop must be inside the object section

```
{#object}{#risks}{#target} {name} {/target}{/risks}{/object}
```

Tag	Description
{#target}{name}{/target}	Name(s) of the risk(s) associated to the process
{#target}{nodeType}{/target}	The type of the object (risk)
{#target}{version}{/target}	The version of the risk
{#target}{creationDate}{/target}	The date of creation of the risk
{#target}{modificationDate}{/target}	The last modification date of the risk
{#target}{nodeSubType}{/target}	The type assigned to the risk (user defined)
{#target}{nodeStatus}{/target}	The status of the risk (in progress vs published)
{#target}{referenceNumber}{/target}	The risk's unique identifier
{#target}{checkinDate}{/target}	The risk's date of publication
{#target}{#checkinBy}{username}{/checkinBy}{/target}	Username of the user who last published the risk
{#target}{#checkinBy}{firstName}{/checkinBy}{/target}	First name of the user who last published the risk
{#target}{#checkinBy}{middleName}{/checkinBy}{/target}	Middle name of the user who last published the risk
{#target}{#checkinBy}{lastName}{/checkinBy}{/target}	Last name of the user who last published the risk

{#target}{#checkinBy}{name}{/checkinBy}{/target}	Full name & username of the user who last published the risk*
{#target}{#checkinBy}{email}{/checkinBy}{/target}	Email of the user who last published the risk
{#target}{#checkinBy}{phone}{/checkinBy}{/target}	Phone Number of the user who last published the risk
{#target}{grossImpact}{/target}	Gross impact of the risk
{#target}{grossLikelihood}{/target}	Gross likelihood of the risk
{#target}{grossDetectability}{/target}	Gross detectability of the risk
{#target}{residualImpact}{/target}	Residual impact of the risk
{#target}{residualLikelihood}{/target}	Residual likelihood of the risk
{#target}{residualDetectability}{/target}	Residual detectability of the risk
{#target}{overrideRollup}{/target}	Boolean value for whether the risk values are overriden
{#target}{analysisJustification}{/target}	Analysis justification for the risk
{#target}{#causalities}{cause}{/causalities}{/target}	Cause of the risk (Cause & Effect)
{#target}{#causalities}{effect}{/causalities}{/target}	Effect of the risk (Cause & Effect)
{residualScore}	The residual score after controls have been factored in
{residualPriority}	The level (numerical) of residual priority
{residualPriorityText}	The level (textual) of residual priority (medium, high, etc)
{residualPercentage}	The residual percentage of the risk
{reviewFrequency}	The set review frequency for the risk
{nextReviewDate}	The next review date for the risk
{#processControls}{controlName}{/processControls}	The name of the control associated with the risk
{#processControls}{impact}{/processControls}	The impact of the control on the risk
{#processControls}{likelihood}{/processControls}	The likelihood of the control on the risk
{#processControls}{detectability}{/processControls}	The detectability of the control on the risk
{#processControls}{priority}{/processControls}	The priority of the control on the risk
{#processControls}{score}{/processControls}	The score of the control on the risk
{#processControls}{percentage}{/processControls}	The percentage of gross risk for the control

{#processControls}{priorityText}{/processControls}	The priority level (textual) of the control (medium, high, etc)
{#processControls}{excluded}{/processControls}	Whether the control is excluded from the risk or not

Associated Controls Tags

These tags can be used to display information about any controls associated to the process. The tags in the section below must be included in a loop for controls:

> The loop must be inside the object section

```
{#object}{#controls}{#target} {name} {/target}{/controls}{/object}
```

Tag	Description
{#target}{name}{/target}	The name of the control
{#target}{nodeType}{/target}	The type of the object (control)
{#target}{version}{/target}	The version of the control
{#target}{creationDate}{/target}	The creation date of the control
{#target}{modificationDate}{/target}	The last modification of the control
{#target}{nodeSubTypeName}{/target}	The assigned type of the control
{#target}{nodeStatus}{/target}	The status of the control (in progress vs published)
{#target}{referenceNumber}{/target}	The control's unique identifier
{#target}{checkinDate}{/target}	The date of the control's last publication
{#target}{#checkinBy}{username}{/checkinBy}{/target}	The username of the user who last published the control
{#target}{#checkinBy}{firstName}{/checkinBy}{/target}	The first name of the user who last published the control
{#target}{#checkinBy}{middleName}{/checkinBy}{/target}	The middle name of the user who last published the control
{#target}{#checkinBy}{lastName}{/checkinBy}{/target}	The last name of the user who last published the control
{#target}{#checkinBy}{name}{/checkinBy}{/target}	The full name and username of the user who last published the control
{#target}{#checkinBy}{email}{/checkinBy}{/target}	The email of he user who last published the control

{#target}{#checkinBy}{phone}{/checkinBy}{/target}	The phone number of the user who last published the control
{#target}{checkinComment}{/target}	The comment attached to the last publication action
{#target}{reviewFrequency}{/target}	The set review frequency for the control
{#target}{nextReviewDate}{/target}	The next review date for the control
{#target}{#categories}{name}{/categories}{/target}	The name of category(ies) under which the control is grouped under
{#target}{keyControl}{/target}	Boolean value for whether the control is a key control
{#target}{frequency}{/target}	The frequency classification of the control
{#target}{effectStyle}{/target}	Preventive or detective control
{#target}{operationType}{/target}	Manual or computer control
{#target}{itControl}{/target}	Boolean value for whether the control is an IT control or not
{#target}{itControlType}{/target}	The type of IT control
{#target}{itAssertionCompleteness}{/target}	IT control assertion – boolean value for completeness
{#target}{itAssertionAccuracy}{/target}	IT control assertion – boolean value for accuracy
{#target}{itAssertionValidity}{/target}	IT control assertion – boolean value for validity
{#target}{itAssertionAuthorization}{/target}	IT control assertion – boolean value for authorization
{#target}{internalEnvironment}{/target}	COSO component – boolean value for internal environment
{#target}{objectiveSetting}{/target}	COSO component – boolean value for objective setting
{#target}{eventIdentification}{/target}	COSO component – boolean value for event identification
{#target}{riskAssessment}{/target}	COSO component – boolean value for risk assessment
{#target}{riskResponse}{/target}	COSO component – boolean value for risk response
{#target}{informationCommunication}{/target}	COSO component – boolean value for information & communication
{#target}{monitoring}{/target}	COSO component – boolean value for monitoring
{#target}{controlActivities}{/target}	COSO component – boolean value for control

	activities
{#target}{controlActivityType}{/target}	COSO component – control activity type
{#target}{existenceOccurrence}{/target}	Financial Assertion – boolean value for existence & occurence
{#target}{completeness}{/target}	Financial Assertion – boolean value for completeness
{#target}{rightsObligations}{/target}	Financial Assertion – boolean value for rights & obligations
{#target}{presentationDisclosure}{/target}	Financial Assertion – boolean value presentation & disclosure
{#target}{valuationAllocation}{/target}	Financial Assertion – - boolean value for valuation & allocation
{#target}{accuracy}{/target}	Financial Assertion – boolean value under Value & Allocation for accuracy
{#target}{classification}{/target}	Financial Assertion – boolean value under Value & Allocation for classification
{#target}{timingCutOff}{/target}	Financial Assertion – boolean value under Value & Allocation for timing or cut-off
{#target}{postingSummarization}{/target}	Financial Assertion – boolean value under Value & Allocation for posting & summarization
{#target}{detailTieIn}{/target}	Financial Assertion – boolean value under Value & Allocation for detail tie-in
{#target}{realizableValue}{/target}	Financial Assertion – boolean value under Value & Allocation for realizable value
{#target}{balanceSheet}{/target}	Financial Statements Impacted – Balance Sheet
{#target}{retainedEarnings}{/target}	Financial Statements Impacted – Retained Earnings
{#target}{incomeStatement}{/target}	Financial Statements Impacted – Income Statement
{#target}{financialStatement}{/target}	Financial Statements Impacted – Financial Statement

Associated Rules Tags

These tags can be used to display information about any rules associated to the process. The tags in the table below must be included in a loop for rules:

> The loop must be inside the object section

```
{#object}{#rules}{#target} {name} {/target}{/rules}{/object}
```

Tag	Description
{#target}{nodeType}{/target}	The type of object (rule)
{#target}{name}{/target}	The name of the rule
{#target}{version}{/target}	The version of the rule
{#target}{creationDate}{/target}	The creation date of the rule
{#target}{modificationDate}{/target}	The last modification date of the rule
{#target}{nodeSubTypeName}{/target}	The assigned type of the rule
{#target}{nodeStatus}{/target}	The status of the rule (in progress vs published)
{#target}{referenceNumber}{/target}	The rule's unique identifier
{#target}{checkinDate}{/target}	The date of publication of the rule
{#target}{#checkinBy}{username}{/checkinBy}{/target}	The username of the user who last published the rule
{#target}{#checkinBy}{firstName}{/checkinBy}{/target}	The first name of the user who last published the rule
{#target}{#checkinBy}{middleName}{/checkinBy}{/target}	The middle name of the user who last published the rule
{#target}{#checkinBy}{lastName}{/checkinBy}{/target}	The last name of the user who last published the rule
{#target}{#checkinBy}{name}{/checkinBy}{/target}	The full name and username of the user who last published the rule
{#target}{#checkinBy}{email}{/checkinBy}{/target}	The email of he user who last published the rule
{#target}{#checkinBy}{phone}{/checkinBy}{/target}	The phone number of the user who last published the rule
{#target}{reviewFrequency}{/target}	The set review frequency for the rule
{#target}{nextReviewDate}{/target}	The next review date for the control
{#target}{#categories}{name}{/categories}{/target}	The name of the category(ies) in which the rules are grouped under
{#target}{source}{/target}	The source of the rule
{#target}{history}{/target}	The history of the rule
{#target}{example}{/target}	The example provided for the rule

Associated Objective, Performance, Control & Risk Indicators Tags

The tags below are common to objective, performance, control and risk indicators

Each of these tags must be included in a loop for the desired object:

> The loop must be inside the object section

- {#objectives}{/objectives} – for objectives
- {#controlIndicators}{/controlIndicators} – for KCI
- {#performanceIndicators}{/performanceIndicators} – for KPI
- {#riskIndicators}{/riskIndicators} – for KRI

```
{#object}{#controlIndicators}{#target} {name} {/target}{/controlIndicators}{/object}
```

Tag	Description
{#target}{name}{/target}	The name of the indicator
{#target}{version}{/target}	The version of the indicator
{#target}{creationDate}{/target}	The creation date of the indicator
{#target}{modificationDate}{/target}	The last modification date of the indicator
{#target}{nodeSubTypeName}{/target}	The assigned type of the indicator
{#target}{status}{/target}	The status of the indicator (in progress vs published)
{#target}{referenceNumber}{/target}	The indicator's unique identifier
{#target}{checkinDate}{/target}	The publication date of the indicator
{#target}{#checkinBy}{username}{/checkinBy}{/target}	The username of the user who last published the indicator
{#target}{#checkinBy}{firstName}{/checkinBy}{/target}	The first name of the user who last published the indicator
{#target}{#checkinBy}{middleName}{/checkinBy}{/target}	The middle name of the user who last published the indicator
{#target}{#checkinBy}{lastName}{/checkinBy}{/target}	The last name of the user who last published the indicator
{#target}{#checkinBy}{name}{/checkinBy}{/target}	The full name and username of the user who last published the indicator
{#target}{#checkinBy}{email}{/checkinBy}{/target}	The email of the user who last published the indicator
{#target}{#checkinBy}{phone}{/checkinBy}{/target}	The phone number of the user who last

	published the indicator
{#target}{checkinComment}{/target}	The comment made at the time of the last publication
{#target}{#categories}{name}{/categories}{/target}	The name of the category(ies) under which the indicator is grouped under
{#target}{indicatorType}{/target}	The type of indicator (not compatible with objectives)
{#target}{thresholdTarget1}{/target}	The first threshold of the indicator (not compatible with objectives)
{#target}{thresholdTarget2}{/target}	The second threshold of the indicator* (not compatible with objectives)
{#target}{thresholdTarget3}{/target}	The third threshold of the indicator (not compatible with objectives)
{#target}{thresholdTarget4}{/target}	The fourth threshold of the indicator (not compatible with objectives)
{#target}{unit}{/target}	(not compatible with objectives)
{#target}{measureDate}{/target}	The last measurement date for the indicator (not compatible with objectives)
{#target}{measureValue}{/target}	The last measurement value for the indicator (not compatible with objectives)
{#target}{#performanceScore}{score}{/performanceScore}{/target}	The performance score of the indicator (not compatible with objectives)
{#target}{#performanceScore}{color}{/performanceScore}{/target}	The current color of the indicator (not compatible with objectives)

*If the indicator only has 2 threshold values, the 2nd value will be thresholdTarget2, while 3 and 4 will be null.

Master Data Tags (Entities & Attributes)

These tags can be used to display information about any master data objects associated to the process. These tags are applicable to both entities and attributes

Each of the tags above must be included in a loop for the desired object:

- {#entities}{/entities} – for entities
- {#attributes}{/attributes} – for attributes

The loop must be inside the object section

```
{#object}{#entities}{#target} {name} {/target}{/entities}{/object}
```

Tag	Description
{#target}{nodeType}{/target}	The type of object (entity or attribute)
{#target}{version}{/target}	The version of the object
{#target}{creationDate}{/target}	The creation date of the object
{#target}{modificationDate}{/target}	The last modification date of the object
{#target}{nodeSubTypeName}{/target}	The assigned type of the object
{#target}{nodeStatus}{/target}	The status of the object (in progress vs published
{#target}{referenceNumber}{/target}	The object's unique identifier
{#target}{checkinDate}{/target}	The date the object was published
{#target}{#checkinBy}{username}{/checkinBy}{/target}	The username of the user who last published the object
{#target}{#checkinBy}{firstName}{/checkinBy}{/target}	The first name of the user who last published the object
{#target}{#checkinBy}{middleName}{/checkinBy}{/target}	The middle name of the user who last published the object
{#target}{#checkinBy}{lastName}{/checkinBy}{/target}	The last name of the user who last published the object
{#target}{#checkinBy}{name}{/checkinBy}{/target}	The full name and username of the user who last published the object
{#target}{#checkinBy}{email}{/checkinBy}{/target}	The email of the user who last published the object
{#target}{#checkinBy}{phone}{/checkinBy}{/target}	The phone number of the user who last published the object
{create}	Boolean value for the object's Create permission (CRUD)
{read}	Boolean value for the object's Read permission (CRUD)
{update}	Boolean value for the object's Update permission (CRUD)

© 2020 Interfacing Technologies Corporation

{delete}	Boolean value for the object's Delete permission (CRUD)

Descriptions

Descriptions can be inserted for an object in EPC. The tags for descriptions are as follows:

```
@@richTextDescription:{nodeId}@@
```

The tag must be inserted in the appropriate loop/section. For example, if you want to print the description of a rule associated to an EPC object, you would need to write the following:

```
{#objects} //open a loop for the objects array
{#object} //open a section for the object
{#rule}{#target} //specify that you want the rule associated to the object
@@richTextDescription:{nodeId}@@ //nodeId will be replaced with the ID of the rul
e and its description will be inserted
{/target}{/rule} //close the section/loop for rules
{/object} //close the section for the object
{/objects} //end the loop through the objects array
```

The description of objects is dependent on the Node ID. You must ensure to insert the tag in the appropriate section.

> Descriptions will not work within tables in Word.

> The printed descriptions will take on Word's default font. To change the default font, please refer to Microsoft Office's official website.

Versions

This array may contain multiple objects for each version (e.g. if a rule has 5 published versions, the array will contain 5 objects, one corresponding to each version). Tags in this section must be included in a loop using the "versions" array:

All tags under this header must be within a loop for versions:

```
{#versions}  {version}  {/versions}
```

Tag	Description
{version}	The version of the object
{checkinDate}	The publication date of the object
{checkinBy}	An object containing information on the user who published the object
{#checkinBy}{username}{/checkinBy}	The username of the user who published the object
{#checkinBy}{firstName}{/checkinBy}	The first name of the user who published the object
{#checkinBy}{middleName}{/checkinBy}	The middleName of the user who published the object
{#checkinBy}{lastName}{/checkinBy}	The lastName of the user who published the object
{#checkinBy}{name}{/checkinBy}	The name of the user who published the object (FName LName (username))
{#checkinBy}{email}{/checkinBy}	The email of the user who published the object
{#checkinBy}{phone}{/checkinBy}	The phone of the user who published the object

Approval Entries

The approvalEntries array contains the approval cycles done on an object. This array may contain multiple objects per approval cycle.

All tags under this header must be within a loop for approval entries:

```
{#approvalEntries}{#user}{username}{/user}{/approvalEntries}
```

Tag	Description
{#target}{nodeType}{/target}	The type of object being reviewed
{#target}{name}{/target}	The name of the object being reviewed
{#user}{username}{/user}	The username of the user who approved/rejected the cycle
{#user}{username}{/user}	The username of the user who approved/rejected the cycle
{#user}{username}{/user}	The username of the user who approved/rejected the cycle
{#user}{username}{/user}	The username of the user who approved/rejected the cycle
{#user}{username}{/user}	The username of the user who approved/rejected the cycle
{#user}{username}{/user}	The username of the user who approved/rejected the cycle
{#user}{username}{/user}	The username of the user who approved/rejected the cycle

{comment}	The comment associated with the approval cycle
{status}	The status of the approval cycle (approved/rejected)
{entryTime}	The time of approval/rejection
{chainType}	The type of approval cycle (serial/parallel)

Properties

The properties array contain all the UDAs of the object. Each object within the array corresponds to 1 UDA. Tags in this section must be included within a loop using “properties”:

```
{#properties} {attributeName}: {attributeValueText} {/properties}
```

Tag	Description
{attributeName}	The name of the attribute
{attributeValueText}	The text or number value of single value attributes
{mandatory}	Boolean for whether the attribute is mandatory
{type}	The type of UDA (Duration, Number, Text, Multi List, Currency)
{listItems}	Array for values of the UDA for Multi List attributes
{#listItems}{indexOrder}{/listItems}	The index order of the multi-value attribute
{#listItems}{defaultSelection}{/listItems}	Boolean indicating if this UDA is mandatory
{#listItems}{name}{/listItems}	The selected value(s) of the UDA

Impact

The impacts object contains the impacts of an EPC Object. In this case, the impact list will leave out direct associations since they are already present in the object. For example, roles associated to a risk will not appear in this section, but processes associated to the risk will. There is one array per EPC object type within this section.

```
"impact": {
    "processes": [],
    "flowObjects": [],
    "materials": [],
    "documents": [],
    "orgUnits": [],
    "roles": [],
    "resources": [],
    "assets": [],
    "objectives": [],
    "controlIndicators": [],
    "performanceIndicators": [],
    "riskIndicators": [],
    "rules": [],
    "risks": [],
    "controls": [],
    "entities": [ ... ],
    "attributes": []
},
```

Tags in this table must be included in the “impact” section then looped through the appropriate object type:

```
{#impact}{#processes} {name} {/processes}{/impact}
```

Object types include:

- Process: {#processes}…{/processes}
- Flow Objects: {#flowObjects}…{/flowObjects}
- Materials: {#materials}…{/materials}
- Documents: {#documents}…{/documents}
- Org Units: {#orgUnits}…{/orgUnits}
- Roles: {#roles}…{/roles}
- Resources: {#resources}…{/resources}
- Assets: {#assets}…{/assets}
- Objectives: {#objectives}…{/objectives}
- KCIs: {#controlIndicators}…{/controlIndicators}
- KPIs: {#performanceIndicators}…{/performanceIndicators}
- KRIs: {#riskIndicators}…{/riskIndicators}
- Rules: {#rules}…{/rules}
- Risks: {#risks}…{/risks}
- Controls: {#controls}…{/controls}

- Entities: {#entities}…{/entities}
- Attributes: {#attributes}…{/attributes}

Tag	Description
{nodeType}	The impacted EPC Object type
{name}	The name of the impacted EPC Object
{nodeStatus}	The status (published vs in progress) of the impacted EPC Object
{parent}	Object of the parent of the impacted EPC Object
{#parent}{name}{/parent}	The name of the parent
{#parent}{nodeType}{/parent}	The object type of the parent

Improvement Requests

The improvement request array will contain IR's raised on the particular EPC Object. Note that only IRs that are "To Implement" will appear in this array.

All tags in the table below must be included in a section for Improvement Requests: {#improvementRequests} …{subject}… {/improvementRequests}

Tag	Description
{#author}{username}{/author}	The username of the IR author
{#author}{firstName}{/author}	The first name of the IR author
{#author}{lastName}{/author}	The flast name of the IR author
{#author}{middleName}{/author}	The middle name of the IR author
{#author}{name}{/author}	The full name + username of the IR author
{#author}{email}{/author}	The email name of the IR author
{#author}{phone}{/author}	The phone name of the IR author
{#target}{nodeType}{/target}	The type of object the IR was raised on
{#target}{name}{/target}	The name of the object the IR was raised on
{nodeStatus}	The status (published vs in progress) of the impacted EPC Object
{postDate}	The IR's date of posting
{subject}	The IR's subject line
{postType}	The collaboration type (IMPROV_REQ in this case)

{systemId}	The IR's unique identifier (the format will follow IR-YYYY-## where YYYY is the year and ## is the number of the IR
{status}	The current status of the IR
{priority}	The priority of the IR
{impact}	The impact of the IR
{value}	The value of the IR
{numberOfReplies}	The number of replies on the IR
{#fileInfos}{name}{/fileInfos}	The name of the attached file
{#fileInfos}{contentLength}{/fileInfos}	The file size (in bytes) of the attached file
{#fileInfos}{extension}{/fileInfos}	The extension of the attached file (.docx, .jpeg, .png, etc)
{description}	The description of the IR
{#children}…{/children}	Replies to the IR*

For replies of the improvement request, insert the tags in the table above within {#children}…{/children}

12.5.1.4.4.2 Process Book Tags

The following tags belong to the “object” object, and must be written inside a section for “object” (See the first section (Object) of General Object Tags)

> Remember that you must write all tags within a higher level tag(s): templaterConfig/subject or objects

```
{#objects}{#object} {sequenceNumber}{name} {/object}{/objects}
     OR
{/#templaterConfig}{#subject}{#object} {sequenceNumber}{name} {/object}{/subjec
t}{/templaterConfig}
```

General Process Tags

Tag	Description
{sequenceNumber}	The sequence number of the process
{annotation}	The annotation attached to the process
{goal}	The goal of the process
{loopProcess}	Boolean value for process type = loop
{parallelProcess}	Boolean value for process type = parallel
{sequentialProcess}	Boolean value for process type = sequential

{compensationProcess}	Boolean value for process type = compensation
{adHocProcess}	Boolean value for process type = ad hoc
{#boundaryEvents}{eventType}{/boundaryEvents}	The event type of the boundary event
{#boundaryEvents}{characteristic}{/boundaryEvents}	The characteristic of the boundary event
{#boundaryEvents}{description}{/boundaryEvents}	The description of the boundary event
{#boundaryEvents}{#boundaryTargets}{name}{/boundaryTargets}{/boundaryEvents}	Name of the boundary event's target
{#boundaryEvents}{#boundaryTargets}{nodeType}{/boundaryTargets}{/boundaryEvents}	Type of the boundary event's target
{#boundaryEvents}{#boundaryTargets}{sequenceNumber}{/boundaryTargets}{/boundaryEvents}	Sequence number of the boundary event's target

Process Description, Map & RACI (RASCI-VS) Matrix Table

To insert the process description, map,or a(RASCI-VS) Matrix use these following tags. They are slightly different than the other tags due to richtext. Simply copy paste and insert into the the .docx document. Note that these tags must be included in the proper loop that has a description/map of the desired object:

```
For Description:
```

```
@@richTextDescription:{nodeId}@@
For Process Map:
@@map:{nodeId}@@
For RASCI Matrix Table:
@@rasciMatrix:{nodeId}@@
```

Here is an example below – the process description and map will be printed.

```
{#objects} //loop through all elements inside the objects array
{#object} //open a section for the object (in this case, the process we want the
description and map of)
Process Description: @@richTextDescription:{nodeId}@@ //the nodeId will get repla
ced by the ID of the process, and the description of the process will be inserte
d into the document.
Process Map: @@map:{nodeId}@@ //the nodeId will get replaced by the ID of the pro
cess, and the map of the process will be inserted into the document.
RASCI Matrix Table: @@rasciMatrix:{nodeId}@@  //the nodeId will get replaced by t
he ID of the process, and the rasci matrix of the process will be inserted into t
he document.
{/object} //close the section for the object
{/objects} //end the loop for the objects array
```

Process Analysis Tags

Tag	Description
{averageActualTime}	Average actual time for the process
{averageWaitingTime}	Average waiting time for the process
{averageInventoryTime}	Average inventory time for the process
{averageTransportTime}	Average transport time for the process
{averageChangeOverTime}	Average change over time for the process
{cost}	Cost of the process
{averageActiveOperators}	Average Active Operators
{averageExecutions}	Average Executions
{currentMaturityLevel}	Current Process Maturity Level
{#maturityTargets}{targetLevel}{/maturityTargets}	Target maturity level
{#maturityTargets}{targetDate}{/maturityTargets}	The target date of the targeted maturity level

12.5.1.4.4.3 Flow Object Tags

The following tags belong to the “nodes” object, and must be written inside a section for “nodes” (See the first section (Object) of General Object Tags)

> Remember that you must write all tags within a higher level tag, in this case the “objects” array {#objects}{#nodes} {/nodes}{/object}. If cannot include nodes under templaterConfig/subject because nodes will always be null for this section.

```
{#objects}{#nodes} {sequenceNumber}{name} {/object}{/objects}
```

Nodes are the individual flow objects within the process.

Relevant tags for flow objects are listed below and include

- General flow object information (flow object name, description, type, etc)
- IPLs
- Events
- Sub-Processes and Tasks
- Gateways
- Flow object analysis information

General

Tag	Description
{graphNodeType}	The type of flow object (event, gateway or activity)
{nodeType}	The type of flow object (more specific than graphNodeType)
{name}	The name of the flow object
{sequenceNumber}	The sequence number of the flow object
{annotation}	The annotation

	attached to the flow object
{#boundaryEvents}{eventType}{/boundaryEvents}	The event type of the boundary event
{#boundaryEvents}{characteristic}{/boundaryEvents}	The characteristic of the boundary event
{#boundaryEvents}{description}{/boundaryEvents}	The description of the boundary event
{#boundaryEvents}{#boundaryTargets}{name}{/boundaryTargets}{/boundaryEvents}	Name of the boundary event's target
{#boundaryEvents}{#boundaryTargets}{nodeType}{/boundaryTargets}{/boundaryEvents}	Type of the boundary event's target
{#boundaryEvents}{#boundaryTargets}{sequenceNumber}{/boundaryTargets}{/boundaryEvents}	Sequence number of the boundary event's target
{#templaterProcesses}{#nodes}@@richTextDescription:{nodeId}@@{/nodes}{/templaterProcesses}	Flow Object description

IPLs

Tag	Description
{#processLinks}{#followingGraphNodes}{name}{/followingGraphNodes}{/processLinks}	The name of the proceeding flow object in map of the target
{#processLinks}{#followingGraphNodes}{nodeType}{/followingGraphNodes}{/processLinks}	The type of the proceeding flow object in the map of the target
{#processLinks}{#targetGraphNode}{name}{/targetGraphNode}{/processLinks}	The name of the flow object that

	the IPL is pointing to
{#processLinks}{#targetGraphNode}{nodeType}{/targetGraphNode}{/processLinks}	The type of flow object that the IPL is pointing to (start, end)
{#processLinks}{#targetProcess}{name}{/targetProcess}{/processLinks}	The name of the target process
{#processLinks}{#targetProcess}{nodeType}{/targetProcess}{/processLinks}	The type of the target process (the type will always be process)

Events

Tag	Description
{characteristic}	The characteristic of the event
{eventType}	The BPMN type of the event

Sub-Processes & Tasks

Tag	Description
{actvityType}	The type of activity (process or subprocess)
{loopCharacteristic}	The activity's loop type (loop, sequential, parallel)
{compensationProcess}	Boolean value for whether the activity is compensating
{adHocTask}	Boolean value for whether the activity is ad hoc
{taskType}	For tasks only – the type of task (manual, user, script, service, etc)

Gateways

Tag	Description
{gatewayType}	The BPMN type of the gateway

Flow Object Analysis Tags

Tag	Description

{averageActualTime}	Average actual time for the flow object
{averageWaitingTime}	Average waiting time for the flow object
{averageInventoryTime}	Average inventory time for the flow object
{averageTransportTime}	Average transport time for the flow object
{averageChangeOverTime}	Average change over time for the flow object
{cost}	Cost of execution for the flow object
{averageActiveOperators}	Average Active Operators
{averageExecutions}	Average Executions

12.5.1.4.4.4 Organization Book Tags

Templates for Organization Books follow the same structure as other object, with a few differences. Refer to the General Tag section for non-specific tags. Users can filter the Organization objects that will go into the Org Book. For example, you can generate a book on an org unit without including sub-items. The resulting output will contain information on the org unit only. Alternatively, you can generate a book and include sub-items, and specify which objects you want. For example, you can generate a book on an org unit that include sub-items, and specify that you only want roles and assets.

This section will list tags specific to Org Objects. Note that only the contents of a Resource object will be different. A table for Resources will be provided below.

> The proper syntax for tags in this section is the same as tags for all Object Books: {#objects}{#object} {firstName} {/object}{/objects}

Tags common across all Org Objects

Tag	Description
{dedicatedPool}	Boolean that indicates whether this object should be in a dedicated pool
{parentOrgUnits}	An array containing info on the object's parent
{#parentOrgUnits}{#target}{name}{/target}{/parentOrgUnits}	The name of the object's parent
{#parentOrgUnits}{#target}{version}{/target}{/parentOrgUnits}	The version of the object's parent
{#parentOrgUnits}{#target}{creationDate}{/target}{/parentOrgUnits}	The creation date of the object's parent
{#parentOrgUnits}{#target}{modificationDate}{/target}{/parentOrgUnits}	The last modification date of the object's parent
{#parentOrgUnits}{#target}{nodeStatus}{/target}{/parentOrgUnits}	The status of the object's parent (published, in progress)
{#parentOrgUnits}{#target}{nodeSubTypeName}{/target}{/parentOrgUnits}	The type associated to

	the object's parent
{#parentOrgUnits}{#target}{checkinDate}{/target}{/parentOrgUnits}	Last publication date of the object's parent
{#parentOrgUnits}{#target}{checkinComment}{/target}{/parentOrgUnits}	Comments associated to the publication
{#parentOrgUnits}{#target}{#checkinBy}{name}{/checkinBy}{/target}{/parentOrgUnits}	The name/username of the user who last published the object's parent

parentOrgUnits is not available for Org Units

Resources

Tag	Description
{firstName}	The first name of the resource
{lastName}	The last name of the resource
{middleName}	The middle name of the resource
{email}	The email of the resource
{phone}	The phone number of the resource

12.5.1.4.4.5 Performance Book Tags

Templates for Performance Books follow the same structure as other objects, with a few differences. Refer to the General Tag section for non-specific tags. Users can filter the performance objects that will go into the Performance Book. For example, you can generate a book on an objective without including sub-items. The resulting output will contain information on the objective only. Alternatively, you can generate a book and include sub-items, and specify which objects you want. For example, you can generate a book on an objective that include sub-items such as KPIs, KRIs and KCIs

This section will list tags specific to Indicators (KCI, KRI, KPI), with the exception of Objectives. You will find all tags that are applicable to objectives in the General Tag section. Note that tags in this section are applicable to all 3 types of indicators.

> The proper syntax for tags in this section is the same as tags for all Object Books: {#objects}{#object} {indicatorType} {/object}{/objects}

Indicator Tags

Tag	Description
{indicatorType}	The type of indicator (KPI, KCI, KRI)
{thresholdTarget1}	The lowest threshold of the indicator
{thresholdTarget2}	The lowest middle threshold of the indicator (Note: this will be the highest threshold if you only have 2 thresholds)
{thresholdTarget3}	The highest middle threshold of the indicator (Note: this will be null if you only have 2 thresholds)
{thresholdTarget4}	The highest threshold of the indicator (Note: this will be null if you only have 2 thresholds)
{unit}	The unit of measurement
{measureDate}	The last date of measurement of the indicator
{measureValue}	The last value of the latest measurement of the indicator
{performanceScore}	The performance score object. Contains the value and color of the score.
{#performanceScore}{score}{/performanceScore}	The value of the performance score of the indicator
{#performanceScore}{color}{/performanceScore}	The color (text) of the performance color of the indicator

12.5.1.4.4.6 Document Book Tags

Templates for Document Books follow the same general structure of the other object books. Refer to the General Tags section for general tags. This section will describe tags that are specific to documents.

Tags in this section start from the root array “objects” and are within the “object” object.

> The proper way to write tags in this section is the same as for all Object Books: {#objects}{#object} {fileInfo} {/object}{/objects}

Tag	Description
{documentType}	The type of the document (URL, FILE, TEMPLATE, etc.)
{url}	The value of the URL (type must be URL)
{fileInfo}	An object containing the document information
{#fileInfo}{name}{/fileInfo}	The name o f the document
{#fileInfo}{extension}{/fileInfo}	The extension of the file (.pdf, .docx, .pptx, etc)
{#fileInfo}{previewable}{/fileInfo}	Boolean for whether the document is previewable

© 2020 Interfacing Technologies Corporation

12.5.1.4.4.7 Risk Book Tags

Templates for Risks Books follow the same general structure of the other object books. Refer to the General Tags section for general tags. This section will describe tags that are specific to risks

Tags in this section start from the root array “objects” and are within the “object” object.

> The proper syntax for tags in this section is the same as any other object book: {#objects}{#object} {grossImpact} {/object}{/objects}

Tag	Description
{grossImpact}	Value of the risk’s gross impact
{grossLikelihood}	Value of the risk’s gross likelihood
{grossDetectability}	Value of the risk’s gross detectability
{residualImpact}	Value of the risk’s residual impact
{residualLikelihood}	Value of the risk’s residual likelihood
{residualDetectability}	Value of the risk’s residual detectability
{overrideRollup}	Boolean value for whether residual values are automatically or manually set
{analysisJustification}	Risk Analysis justification
{grossScore}	Value of the risk’s gross score
{grossPriority}	Value of the risk’s gross priority
{residualScore}	Value of the risk’s residual score
{residualPriority}	Value of the risk’s residual priority
{residualPercentage}	Value of the risk’s residual percentage
{causalities}	An array containing causes and effects
{#causalities}{cause}{/causalities}	Causes of the risk
{#causalities}{effect}{/causalities}	Effects of the risk
{controlRisks}	An arrary that contains controls associated to the risk***
{#controlRisks}{controlName}{/controlRisks}	The name of the associated control
{#controlRisks}{impact}{/controlRisks}	The impact value of the associated control

{#controlRisks}{likelihood}{/controlRisks}	The likelihood value of the associated control
{#controlRisks}{detectability}{/controlRisks}	The detectability value of the associated control
{#controlRisks}{priority}{/controlRisks}	The priority value of the associated control
{#controlRisks}{score}{/controlRisks}	The score value of the associated control
{#controlRisks}{percentage}{/controlRisks}	The percentage off gross risk of the associated control
{#controlRisks}{priorityText}{/controlRisks}	The priority text value of the associated control (Low, Medium High)
{#controlRisks}{excluded}{/controlRisks}	Boolean value for whether the control is excluded from calculations

***For controls associated to the risk, you can also use the controls array (#controls}…{/controls}. See the General Tags section for more details. The controls array will have more descriptive attributes, whereas the controlRisks array will have the risk analysis value attributes.

12.5.1.4.4.8 Control Book Tags

Templates for Control Books follow the same general structure of the other object books. Refer to the General Tags section for general tags. This section will describe tags that are specific to controls.

Tags in this section start from the root array “objects” and are within the “object” object.

> The proper syntax for tags in this section is the same as any other object book: {#objects}{#object} {keyControl} {/object}{/objects}

Tag	Description
{keyControl}	Boolean for the key control attribute
{frequency}	The frequency classification of the control
{effectStyle}	Preventive or detective control
{operationType}	Manual or computer control
{itControl}	Boolean value for whether the control is an IT control or not
{itControlType}	The type of IT control
{itAssertionCompleteness}	IT control assertion – boolean value for completeness
{itAssertionAccuracy}	IT control assertion – boolean value for accuracy
{itAssertionValidity}	IT control assertion – boolean value for validity
{itAssertionAuthorization}	IT control assertion – boolean value for authorization
{internalEnvironment}	COSO component – boolean value for internal environment
{objectiveSetting}	COSO component – boolean value for objective setting
{eventIdentification}	COSO component – boolean value for event identification
{riskAssessment}	COSO component – boolean value for risk assessment
{riskResponse}	COSO component – boolean value for risk response
{informationCommunication}	COSO component – boolean value for information & communication
{monitoring}	COSO component – boolean value for monitoring
{controlActivities}	COSO component – boolean value for control activities
{controlActivityType}	COSO component – control activity type
{existenceOccurrence}	Financial Assertion – boolean value for existence & occurence

© 2020 Interfacing Technologies Corporation

{completeness}	Financial Assertion – boolean value for completeness
{rightsObligations}	Financial Assertion – boolean value for rights & obligations
{presentationDisclosure}	Financial Assertion – boolean value presentation & disclosure
{valuationAllocation}	Financial Assertion – - boolean value for valuation & allocation
{accuracy}	Financial Assertion – boolean value under Value & Allocation for accuracy
{classification}	Financial Assertion – boolean value under Value & Allocation for classification
{timingCutOff}	Financial Assertion – boolean value under Value & Allocation for timing or cut-off
{postingSummarization}	Financial Assertion – boolean value under Value & Allocation for posting & summarization
{detailTieIn}	Financial Assertion – boolean value under Value & Allocation for detail tie-in
{realizableValue}	Financial Assertion – boolean value under Value & Allocation for realizable value
{balanceSheet}	Financial Statements Impacted – Balance Sheet
{retainedEarnings}	Financial Statements Impacted – Retained Earnings
{incomeStatement}	Financial Statements Impacted – Income Statement
{cashFlowStatement}	Financial Statements Impacted – Cash Flow Statement
{financialStatement}	Financial Statements Impacted – Financial Statement

© 2020 Interfacing Technologies Corporation

12.5.1.4.4.9 Rule Book Tags

Templates for Rule Books follow the same general structure of the other object books. Refer to the General Tags section for general tags. This section will describe tags that are specific to rules.

Tags in this section start from the root array “objects” and are within the “object” object.

> The proper syntax for tags in this section is the same as any other object book: {#objects}{#object} {source} {/object}{/objects}

Tag	Description
{source}	Value for “What is the source of this Rule?”
{history}	Value for “What is the history of this Rule?”
{example}	Value for “What is an example of this Rule?”

12.5.1.4.4.10 Master Data Book Tags

Templates for Master Data follow the same general structure of the other object books. Refer to the General Tags section for general tags. This section will describe tags that are specific to Master Data

Note that for Master Data, you are able to filter which types of object will be included in the document (Entity or Attribute).

Tags in this section start from the root array “objects” and are within the “object” object.

> The proper syntax for tags in this section is the same as any other object book: {#objects}{#object} {namespace} {/object}{/objects}

Entities

Note: Other than Process, Entities is the other EPC object to have attributes as associations. Refer to General Tags for tags for all associative objects.

Tag	Description
{namespace}	The namespace in which the entity is implemented
{rolePermissions}	An array containing all roles and their CRUD permissions
{#rolePermissions}{#target}{name}{/target}{/rolePermissions}	Name of the role that has CRUD permissions
{#rolePermissions}{#target}{nodeType}{/target}{/rolePermissions}	Object Type that has CRUD permissions (in this case always ROLE)
{#rolePermissions}{create}{/rolePermissions}	Boolean for Create permission for the role
{#rolePermissions}{read}{/rolePermissions}	Boolean for Read permission for the role
{#rolePermissions}{update}{/rolePermissions}	Boolean for Update permission for the role
{#rolePermissions}{delete}{/rolePermissions}	Boolean for Delete permission for the role
{resourcePermissions}	An array containing all resources and

	their CRUD permissions
{#resourcePermissions}{#target}{name}{/target}{/resourcePermissions}*	Name of the resource that has CRUD permissions
{#resourcePermissions}{create}{/resourcePermissions}	Boolean for Create permission for the resource
{#resourcePermissions}{read}{/resourcePermissions}	Boolean for Read permission for the resource
{#resourcePermissions}{update}{/resourcePermissions}	Boolean for Update permission for the resource
{#resourcePermissions}{delete}{/resourcePermissions}	Boolean for Delete permission for the resource

See the General Object Tags section for more tags on roles and resources. You can insert more information between {#target}…{.target}; for example, the creation date of the role or resource by writing {#target}{creationDate}{/target}. The same is applicable to attributes.

Attributes

Tag	Description
{complexEntity}	Boolean indicating if the attribute is a complex entity
{rolePermissions}	An array containing all roles and their CRUD permissions
{#rolePermissions}{#target}{name}{/target}{/rolePermissions}	Name of the role that has CRUD permissions
{#rolePermissions}{#target}{nodeType}{/target}{/rolePermissions}	Object Type that has CRUD permissions (in this case always ROLE)
{#rolePermissions}{create}{/rolePermissions}	Boolean for Create permission for the role
{#rolePermissions}{read}{/rolePermissions}	Boolean for Read permission for the role
{#rolePermissions}{update}{/rolePermissions}	Boolean for Update permission for the role
{#rolePermissions}{delete}{/rolePermissions}	Boolean for Delete permission for the

	role
{resourcePermissions}	An array containing all resources and their CRUD permissions
{#resourcePermissions}{#target}{name}{/target}{/resourcePermissions}*	Name of the resource that has CRUD permissions
{#resourcePermissions}{create}{/resourcePermissions}	Boolean for Create permission for the resource
{#resourcePermissions}{read}{/resourcePermissions}	Boolean for Read permission for the resource
{#resourcePermissions}{update}{/resourcePermissions}	Boolean for Update permission for the resource
{#resourcePermissions}{delete}{/resourcePermissions}	Boolean for Delete permission for the resource

12.5.1.4.4.11 Template Document Tags

In addition to object information, users are able to include information on the template used to generate the document. Note that you can also print the associations of the template. Refer to the General Object Tags section – the templateDocument object contains the same data as a document object.

> ! The tags listed below must be included in a section for templaterConfig **AND** templateDocument:

```
{#templaterConfig}{#templateDocument}...{/templateDocument}{/templaterConfig}
```

Template Tags

Tag	Description
{name}	The name of the template
{version}	The version of the template
{creationDate}	The creation date of the template
{modificationDate}	The last modification date of the template
{nodeSubTypeName}	The assigned type of the template
{nodeStatus}	The status of the template (in progress vs published)
{referenceNumber}	The template's unique identifier
{#parent}{name}{/parent}	The folder in which the template is stored
{checkinDate}	Date of the most recent publication
{#checkinBy}{username}{/checkinBy}	Username of the user who last published the template
{#checkinBy}{firstName}{/checkinBy}	First name of the user who last published the template
{#checkinBy}{middleName}{/checkinBy}	Middle name of the user who last published the template
{#checkinBy}{lastName}{/checkinBy}	Last name of the user who last published the template
{#checkinBy}{name}{/checkinBy}	Full name and username of the user who last published the template
{#checkinBy}{phone}{/checkinBy}	Phone number of the user who last published the template
{#checkinBy}{email}{/checkinBy}	Email of the user who last published the template
{checkinComment}	Comment made by the publisher at the time of publication

© 2020 Interfacing Technologies Corporation

12.5.1.4.4.12 Generated from Template Tags

Generated from Template documents are a special type of documents that allow users to create more detailed Standard Operating Procedures or similar types of documents. Refer to the Generated from Template section for more information. This section of the help manual will explain the tags that are applicable to Generated from Template documents

> Note that Generated from Template documents work the same way as a regular document, so all tags in the General Tags section as well as the Document Tags section are also applicable to Generated from Template documents. You can print file information, version history, impacts, etc.

This section is particular because tags for these types of document must always be written inside the templaterConfig/subject sections. It will not work if the tags are specified in the objects array. The structure is the same as all other objects – the document is composed of 6 properties: object, properties, versions, impacts, approvalEntries and nodes. For example, to print the name of the document:

```
{#templaterConfig}{#subject}{#object} {name} {/object}{/subject}{/templaterConfig}
```

Generated from Template Tags

Tag	Description
{documentType}	The type of document (in this case SOP)
{template}	An object containing information about the associated template
{#template}{name}{/template}	The name of the template associated to the document
{heading1}	The first heading in the custom section of the document*
{processes}	An object containing information about the associated process
{#proceses}{#target}{name}{/target}{/processes}	The name of the associated process

> There are 10 heading sections. To print the other sections, simply specify the number of the heading, e.g. {heading2}, {heading3}, etc.

Custom Sections

To insert custom text sections into the output, use the following tag:

```
@@text:1@@
```

There are 10 custom text sections. To print the other sections, simply specify the number of the custom text section after the colon (:). The tag would then be text:2, text:3, etc.

12.5.1.4.5 Template FAQs

Troubleshooting

Why am I getting a syntax error when I am trying to generate a document?

Syntax errors means there is a mistake in the template. There can be a variety of errors that cause a syntax error:

- A loop or section that is opened and not closed/closed but not opened
- Forgetting a pound (#) or slash (/) when opening/closing a section/loop
- Tags for an opening and closing loop do not match (e.g. {#process}…{/processes}
- A loop being opened outside a table but closed inside a table (the reverse is also true)
- An inverted section ({^process}…) not being closed

Why do I see undefined in the output for some fields?

If a value is null, the resulting output will be “undefined”. To avoid this, use an inverted section.

My tags are too long and messes up the formatting of the output

If your tags are too long (e.g. within a table), you can reduce the font size of the opening and closing tags for loops or sections ({#loop)…{/loop})

My table is repeating multiple times instead of the rows expanding

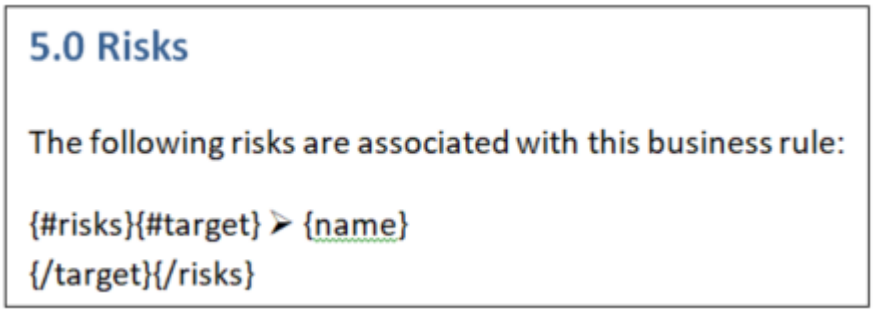
You must open and close the loop inside the table. If you open and close your loop outside the table, the table will repeat for each element in the object.

The sections in my output are looping multiple times for each object (e.g. There is an intro, description, associations section, but each section repeats multiple times before moving on to the next).

Verify your loops. If you open and close a loop and include only 1 section (e.g. intro), the introduction will be repeated for as many objects as there are in the loop before moving on to the description section. You must enclose all sections you want to repeat per object in a single loop.

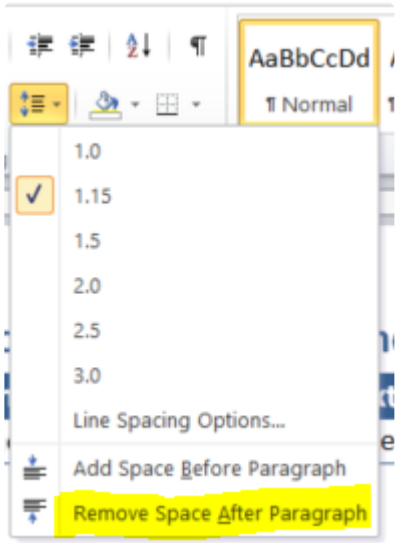
My lists does not skip a line in the resulting output and everything is on a single line

If use a loop on the same line without a line break, the resulting output will be all list items being printed on that line. Break the loop with a line break.



My lists skip a line in the resulting output. I would like the lists to have one item on each line

Refer to the image above. Remove all the space between the first and the second line by clicking on the first line and removing the space after the paragraph, then clicking on the second line and removing the space before the paragraph.



Why can't I see my custom headers and text in my Generated from Template output?

If you do not see your custom headers and text in the output, make sure that the appropriate tags are inserted for the corresponding header/text section in the template. Refer to Generated from Template Tags for more information.

Tips

- You do not need to open and close a loop for every section/attribute. Mutliple tags can be inserted in a single loop. See the code block below for an example

```
{#objects} //opening a loop for objects
{#object} //opening a section for the object. Insert as many tags as you want wit
hin this section
```

```
Process Name: {name}
Creation Date: {creationDate}
{#roles}{#target}Responsible: {name}{/target}{/roles}
{/object} //closing the loop for the object
{#nodes}Task Name: {name} //opening a loop for the flow objects. Insert as many t
ags as you want within this section
{/nodes} //closing the loop for flow objects
{/objects} //closing the loop for objects
```

This code block will generate the following output:

```
Process Name: 1.0 Shipping
Creation Date: 2018-08-12
Responsible: Warehouse Manager
Space
Task Name: 1.1 Find items in order
Task Name: 1.2 Load into shipping crate
Task Name: 1.3 Send shipping crate
```

- New lines are kept inside of the loop. Given

```
{#nodes}
    {name}
{/nodes}
```

The following output will be generated:

```
Space
Task Name: 1.1 Find items in order
Space
Space
Task Name: 1.2 Load into shipping crate
Space
Space
Task Name: 1.3 Send shipping crate
Space
```

12.5.1.4.6 Obtaining Payloads for Template Building

When building templates from scratch, it is always better to know what data is available to you. In the first sections of the help manual on templates, you were explained that a data input file is merged with a word document containing tags to dynamically generated an output. The EPC uses a JSON file as a data input file. If you compare an existing template to the JSON, you will notice that the tags match exactly with the attributes within the JSON. This means that building a template is simply taking the attribute name in the JSON, enclosing it in curly braces and adding a layer of logic and formatting.

List of Requests

To obtain the data input file, paste the following URLs directly into your browser. You will get the data input file in a raw JSON format.

For most URLs:

- Replace the first ID (the long string of letters and numbers separated by dashes) by the ID of the object you want to obtain the payload.
- Replace the second ID by the ID of a valid template.
- For Generated from Template, replace the ID with the ID of the Generated from Template document

> You must be logged in EPC before pasting the URL in your browser. Otherwise you will get an error.

Object	Request Example
Process	https://example.interfacing.com/api/v1/process/items/11AA111A-A111-111A-11AA-AA111AA1A111/templat payload?draft=true&language=en&templateId=11AA111A-A111-111A-11AA-AA111AA1A111&includeChild
Organization	https://example.interfacing.com/api/v1/organization/items/11AA111A-A111-111A-11AA-AA111AA1A111/ter payload?templateId=11AA111A-A111-111A-11AA-AA111AA1A111&includeChildren=true&language=en&draft=true&types=ORG_UNIT&types=ROLE&types=
Document	https://example.interfacing.com/api/v1/document/items/11AA111A-A111-111A-11AA-AA111AA1A111/temp payload?templateId=11AA111A-A111-111A-11AA-AA111AA1A111&includeChildren=true&language=en&d
Performance	https://example.interfacing.com/api/v1/performances/items/11AA111A-A111-111A-11AA-AA111AA1A111/te payload?templateId=11AA111A-A111-111A-11AA-AA111AA1A111&includeChildren=true&language=en&draft=true&types=KCI&types=KPI&types=KRI&types
Risk	https://example.interfacing.com/api/v1/risk/items/11AA111A-A111-111A-11AA-AA111AA1A111/templater-payload?templateId=11AA111A-A111-111A-11AA-AA111AA1A111&includeChildren=true&language=en&d

Control	https://example.interfacing.com/api/v1/control/items/11AA111A-A111-111A-11AA-AA111AA1A111/template payload?templateId=11AA111A-A111-111A-11AA-AA111AA1A111&includeChildren=true&language=en&d
Rule	https://example.interfacing.com/api/v1/rule/items/11AA111A-A111-111A-11AA-AA111AA1A111/templater-payload?templateId=11AA111A-A111-111A-11AA-AA111AA1A111&includeChildren=false&language=en&c
Master Data	https://example.interfacing.com/api/v1/masterData/items/11AA111A-A111-111A-11AA-AA111AA1A111/tem payload?templateId=11AA111A-A111-111A-11AA-AA111AA1A111&includeChildren=true&language=en&draft=true&types=ENTITY&types=ATTRIBUTE
Generated from Template	https://example.interfacing.com/api/v1/document/documents/11AA111A-A111-111A-11AA-AA111AA1A111 payload?draft=true

Request Parameters

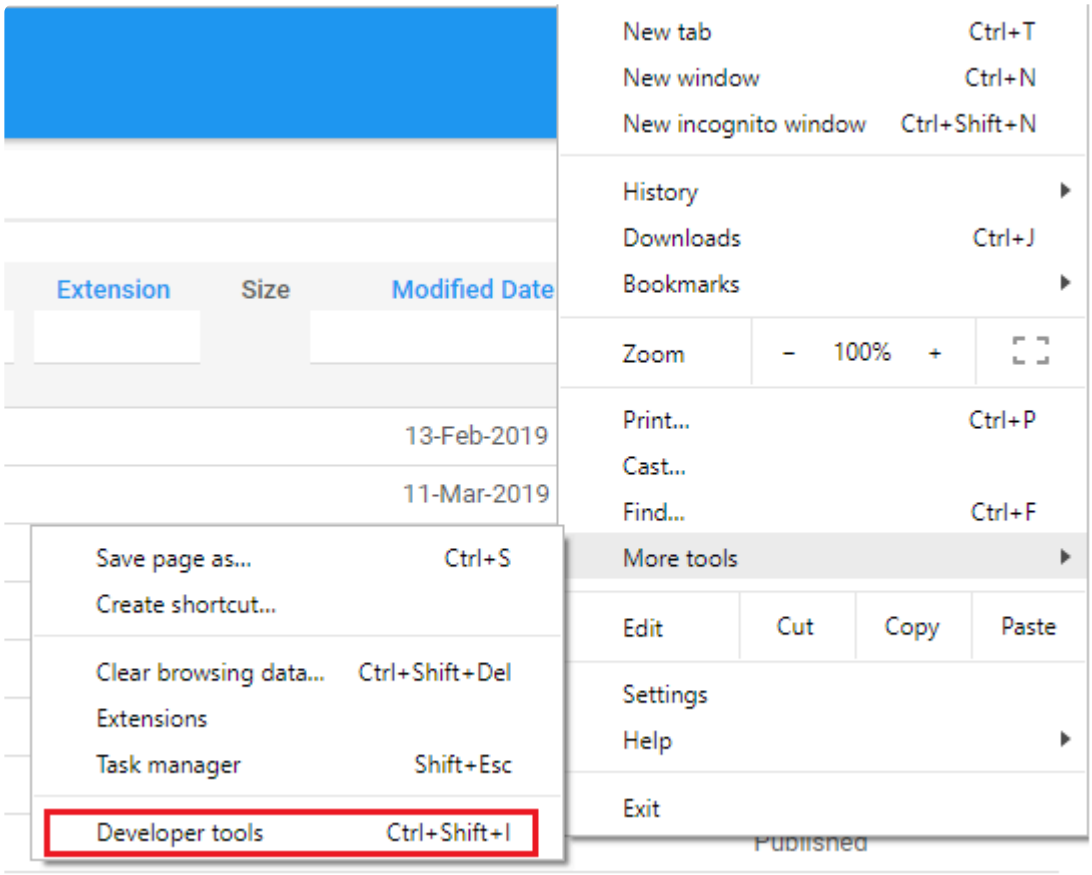
Parameter	Description
draft	To obtain the payload of the published version of the object, set draft to true. To obtain the latest version, set draft to false.
language	To obtain the payload of the object in a specific language, set language to the 2 letter ISO2 language code.
includeChildren	To obtain the payload of the object and all its sub items, set includeChildren to true. To obtain only the object without sub items, set it to false.
types	To filter the payload to obtain only items of a certain type, add or remove types (&types=[OBJECT_TYPE]). This filter only applies to the Organization, Performance and Master Data modules.

Alternative method of obtaining payloads

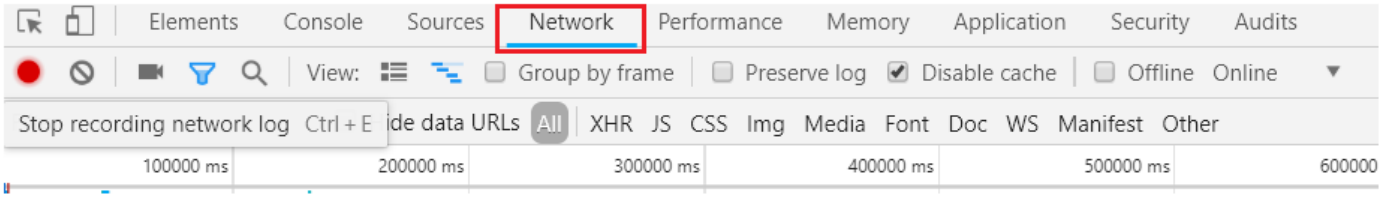
The steps described below applies to Google Chrome.

An alternative to copy/pasting the URL into your browser from the list in the help manual is to do via the Google Chrome DevTools (or any other tool that can intercept network requests)

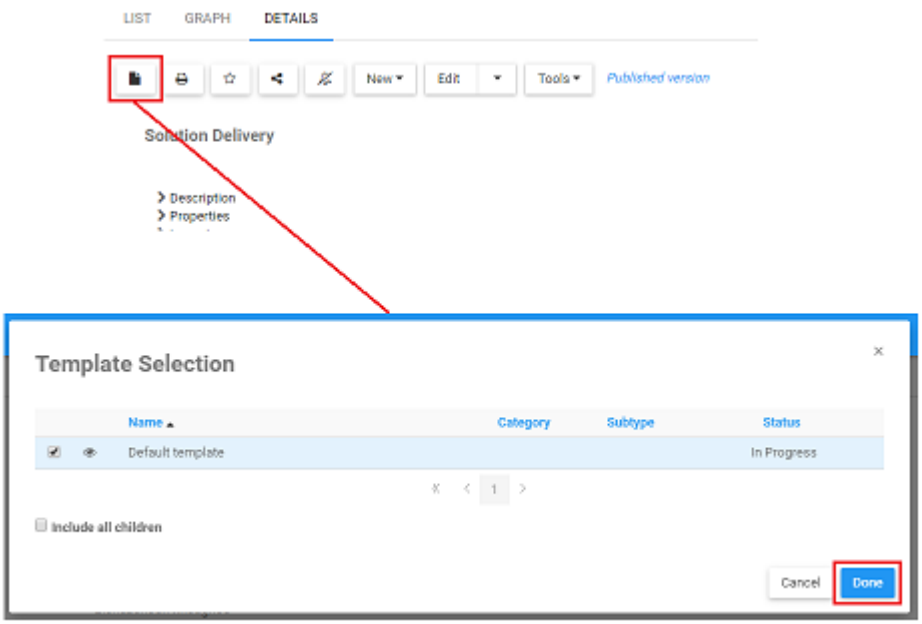
1. Navigate to the module you want the data input file for
2. Open up the Google DevTools by pressing the F12 key on your keyboard. Alternatively, click on your browser options > More Tools > Developer Tools



3. In the Developer Tools, navigate to the Network tab



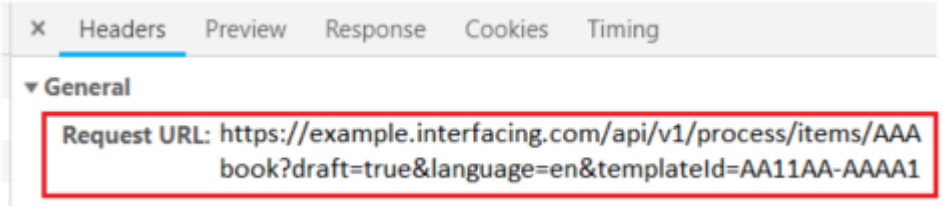
4. In the EPC, generate a document by selecting any template in the prompt. The purpose is to intercept a request in order to look at the data input file.



5. Back in the Developer Tools, search for a POST request that starts with “book?” (“sop?” for Generated from Template}

Name	Method
items?page=1&per_page=10&sort_by=name&order=ASC&...	GET
collect?v=1&_v=j73&a=1859583973&t=event&_s=151&dl=...	GET
collect?v=1&_v=j73&a=1859583973&t=event&_s=152&dl=...	GET
data:image/svg+xml;...	GET
data:image/svg+xml;...	GET
book?draft=true&language=en&templateId=BCB15775-378...	POST

6. Click on the POST request. A window to the right side of the tool will appear. Under the “Headers” tab, copy and paste the Request URL into your browser and change “book” to “templater-payload” in the address bar of your URL (see request table above)



Reading payloads

After copying the URL in your browser, the result is a raw unformatted JSON file. To make the format easily readable, there are a variety of options:

1. Download the JSON formatter extension directly on your browser (for Google Chrome)
2. Copy paste the entire JSON and paste it in an online JSON viewer
3. Copy paste the entire JSON into an IDE that can format JSON into a readable format

12.5.1.4.7 Custom Object Book Templates

Default Templates are provided to you to download at this following link for the different modules: EPC Template Downloads

12.5.2 Edit Document Objects

Web Modelers can edit the Details of Document Objects. They need to navigate to the Edit button of the object to access the Edit Details window. The Edit Details window has two tabs, General and Properties. Under each tab there are different sections where the Web Modeler can input detailed information about the Document object.

Web Modelers can choose the editing language in the Edit Details window.

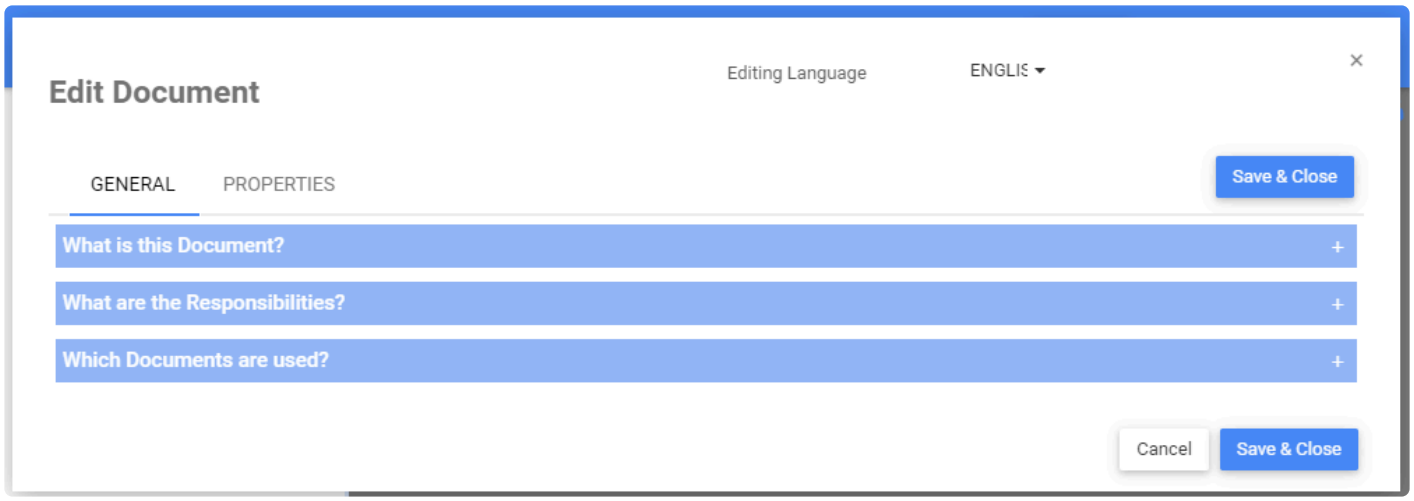
Only users with the Web Modeler Permission will be able to see the Edit Button on the toolbar; the displayed content needs to be set to Show Latest, and the editing tool is the Web.

This section will cover the following:

1. Edit Document General Details
2. Edit Document Properties Details

12.5.2.1 Edit Document General Details

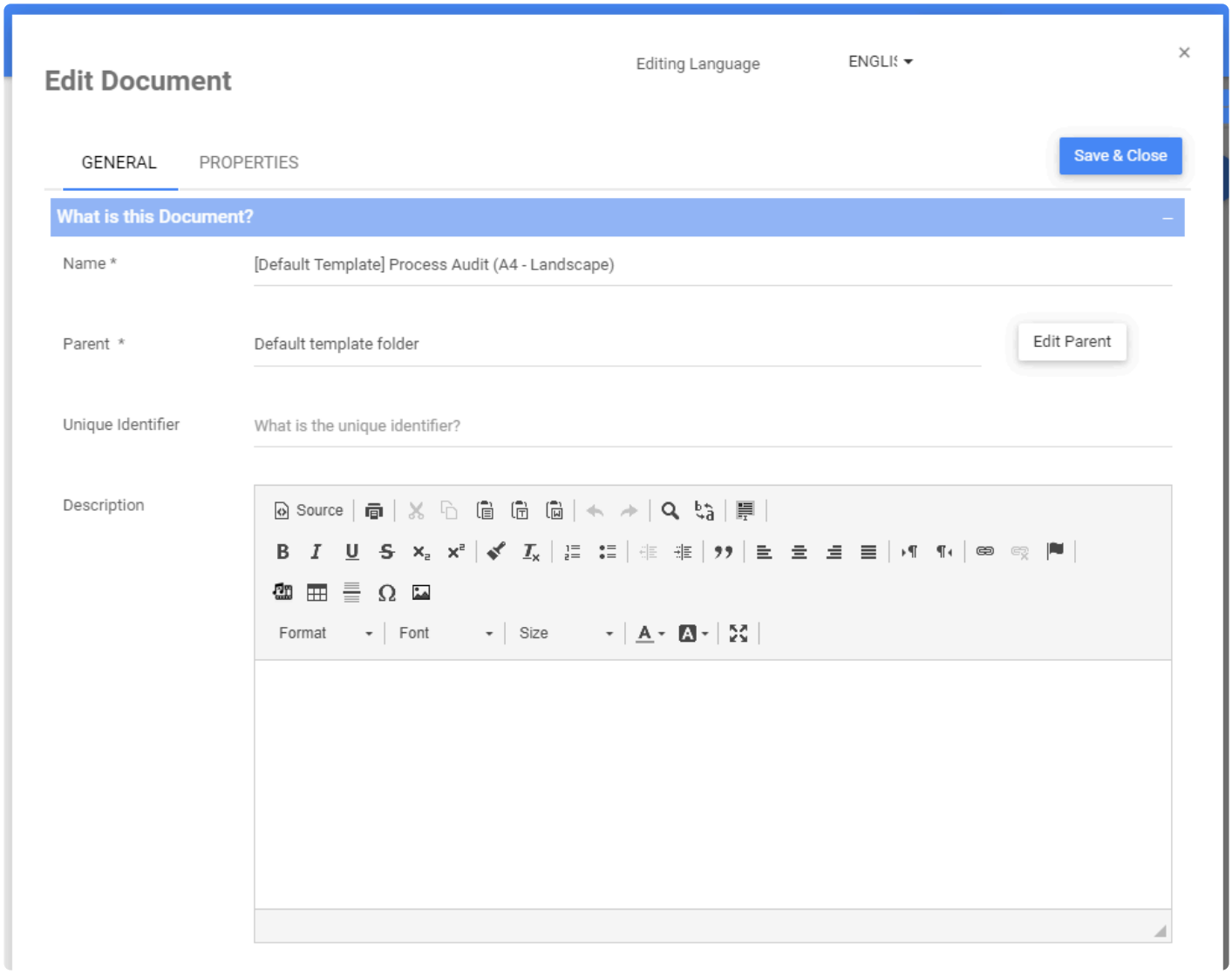
The General tab contains a section for the basic information about the Document, where the document can be uploaded, as well as the Responsibilities and Associations sections.



What is this Document?

This table below describes the fields of this section.

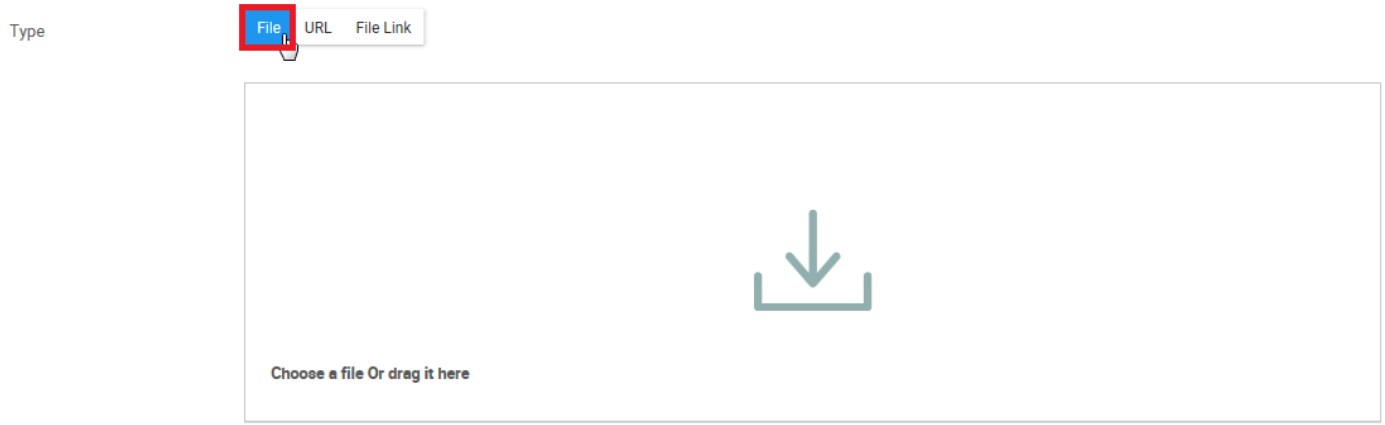
Field	Description
Name	The name of this Document. A name is **mandatory** for all objects.
Parent Folder	The Folder under which this Document is nested.
Unique Identifier	The Unique Identifier of this Document. This serves to uniquely identify the Document as per your company protocol.
Description	This field describes the document in detail. The rich text format allows for text formatting, images, URLs, tables, etc.
Type	The type of document (File, URL, File Link). See below for detailed instructions on how to upload a document.



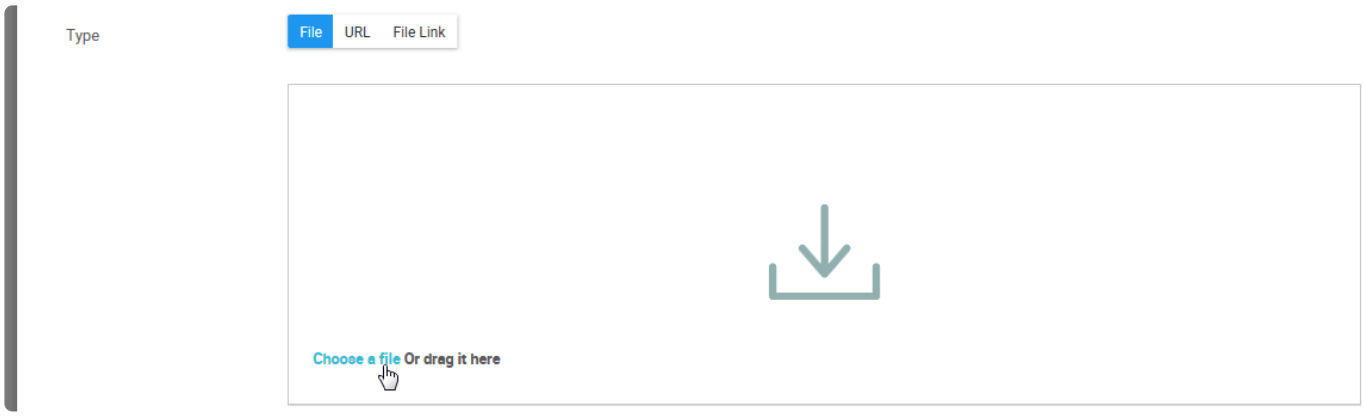
Upload a Document (File, URL, File Link)

To Add a File

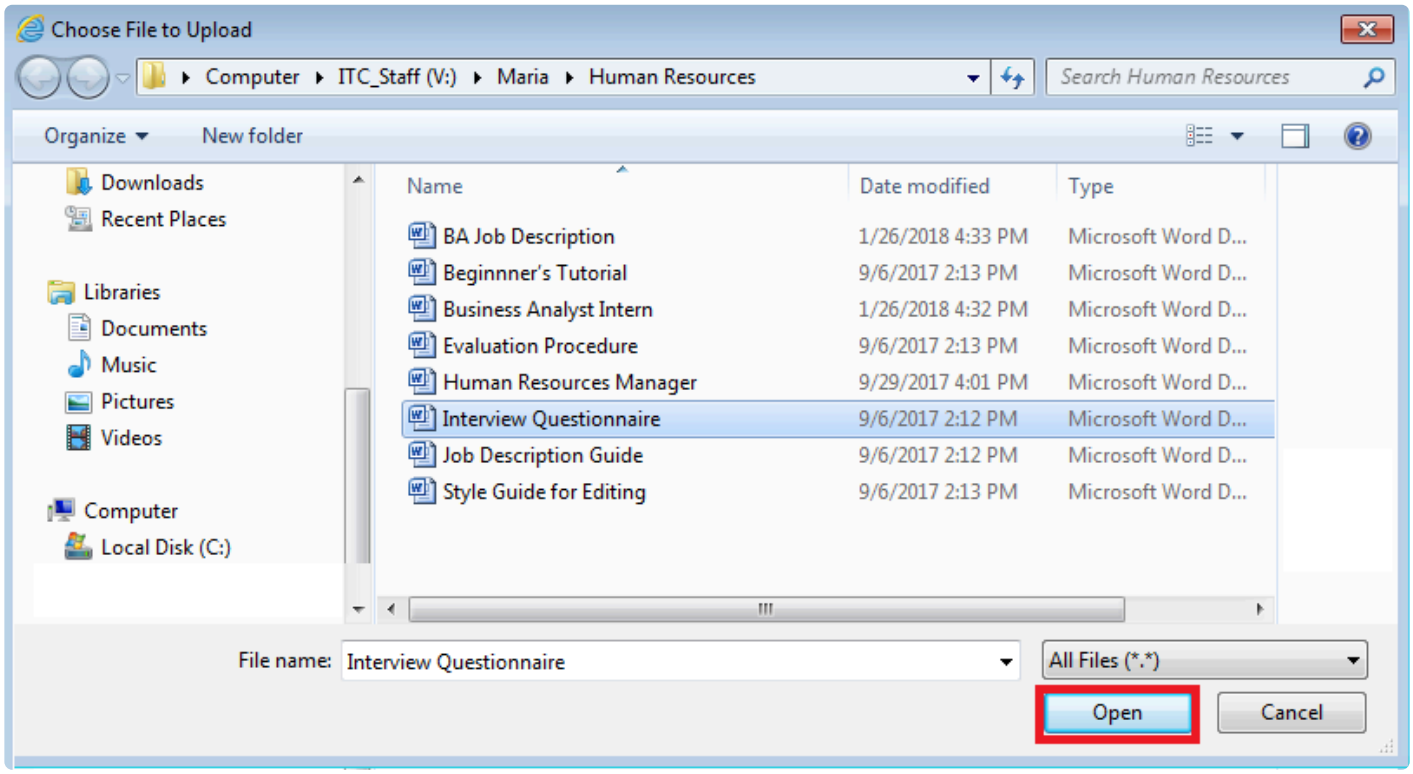
i) Navigate to the “Type” sub-section, and click on the “File” box



ii) Click on “Choose a file” to choose the file you want to upload



iii) A window will be generated where you can choose the file you want to upload

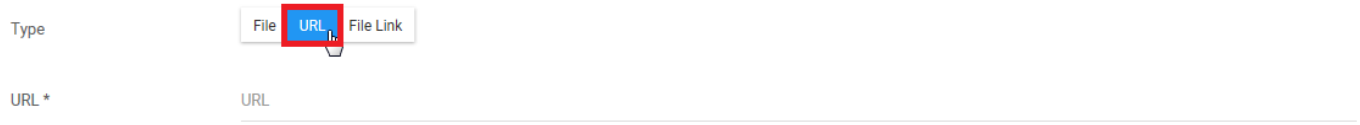


<u>Or</u>

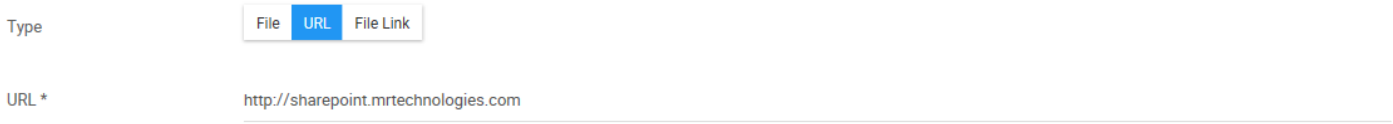
iv) Drag the file you want to upload to the box

To Add a URL

i) Navigate to the “Type” sub-section, and click on the “URL” box

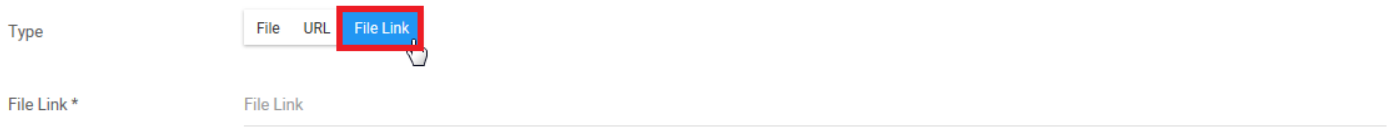


ii) Type or Paste the URL you want to upload

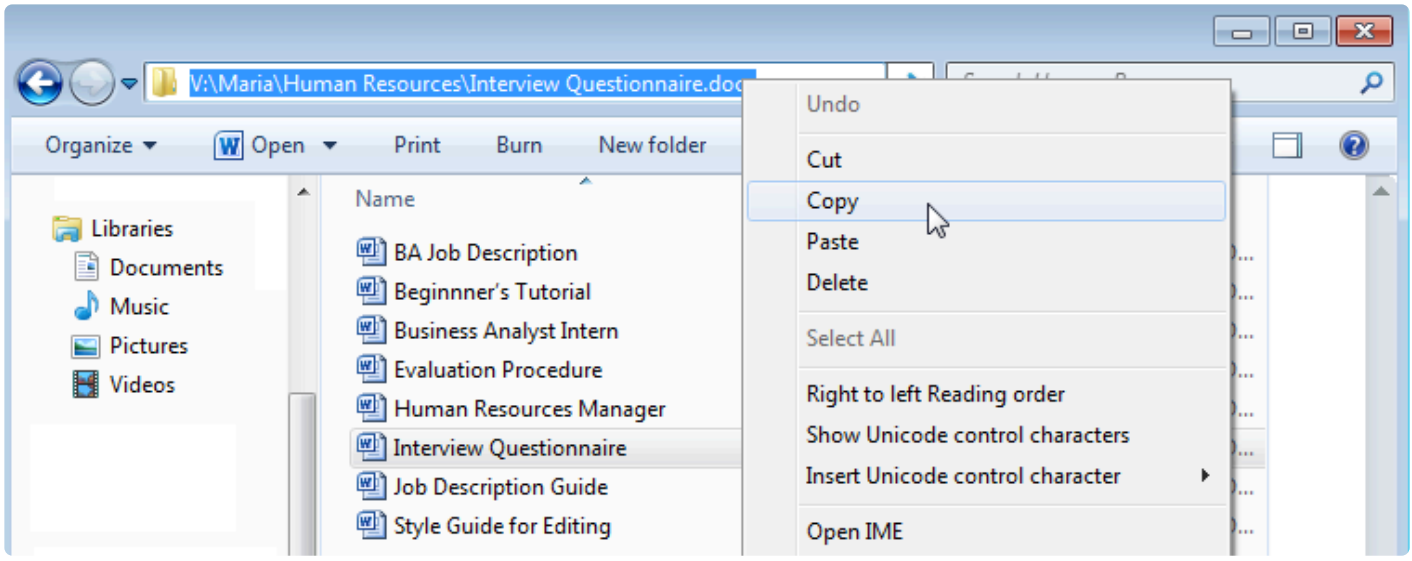


To Add a File Link

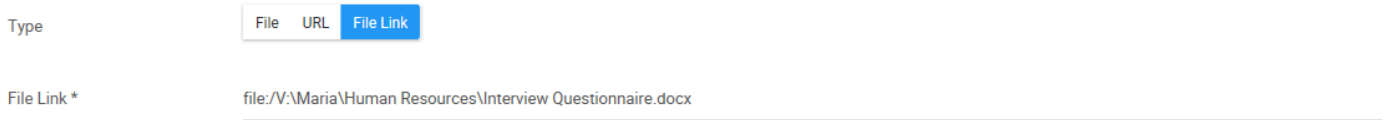
i) Navigate to the “Type” sub-section, and click on the “File Link” box



ii) Copy the File Link of the file you want to upload



iii) Paste the File Link you want to upload



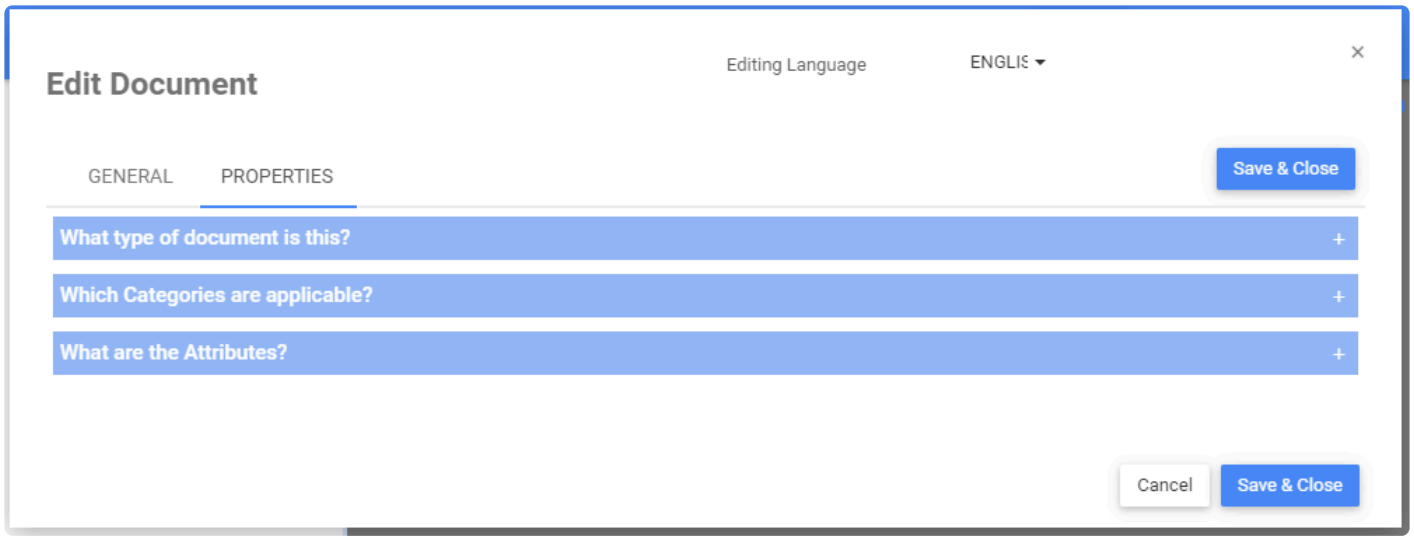
Responsibilities and Associations

Since the Responsibilities and Associations sections are common to many EPC objects, the instructions have been centralized in the Associations section of the user manual. You can find direct links to instructions for specific sections below.

Section	Instructions
What are the Responsibilities?	Assign Responsibilities
Which Documents are used?	Associate Documents

12.5.2.2 Edit Document Properties Details

The Properties tab contains sections for the type, the categories applicable and the attributes.



Since the Properties sections are common to many EPC objects, the instructions have been centralized in the Properties section of the user manual. You can find direct links to instructions for specific sections below.

Section	Instructions
What type of [Object] is this?	Object Type
Which Categories are applicable?	Object Categories
What are the Attributes?	Object Attributes

12.5.3 Delete Document Objects

Web Modelers can Delete Document Objects if they have Delete security permission.

To learn how delete objects, click here

12.5.4 Publish Document Objects

Once Web Modelers finished creating Document Objects, they can publish it and allow all users with rights to view the objects.

To learn how to publish objects, click here

12.5.5 Document Objects Approval Cycle

Web Modelers can set Approval Cycles on Document Objects.

To learn how to set Approval Cycles, click here

12.5.6 Document Objects Security

Web Modelers that are System Admins, Environment Admins, have Full Control Allow permission or have Read + Write + Delete Permission can set security permissions on Document Objects.

To learn how to set security on an object, click here.

12.5.7 Move Document Objects

Users can move Documents and Document Folders within the Documents Module in the EPC.

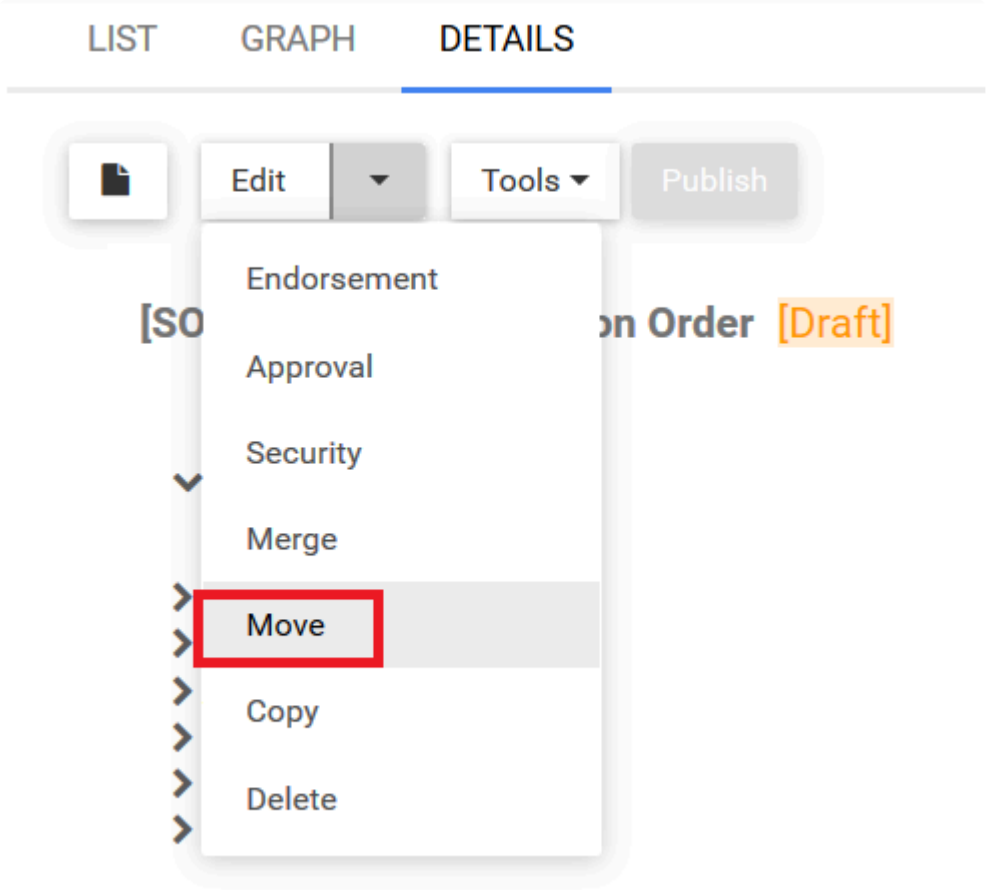
In Edit Mode, Document Folders can be moved from:

1. Folder to Folder
2. Folder to Set (Vice Versa)

Documents can be moved from

1. Folder to Folder

To move Document Objects, navigate to the item's details page. Within the "Edit" dropdown, select "Move".



You can find further detail on Moving Objects in the EPC here.

12.5.8 Merge Document Objects

Users can merge similar objects in the EPC, allowing you to combine multiple objects into one. This action will allow you to remove duplicate items while maintaining their content and relationships in the application.

This capability is typically used in some of the following scenarios:

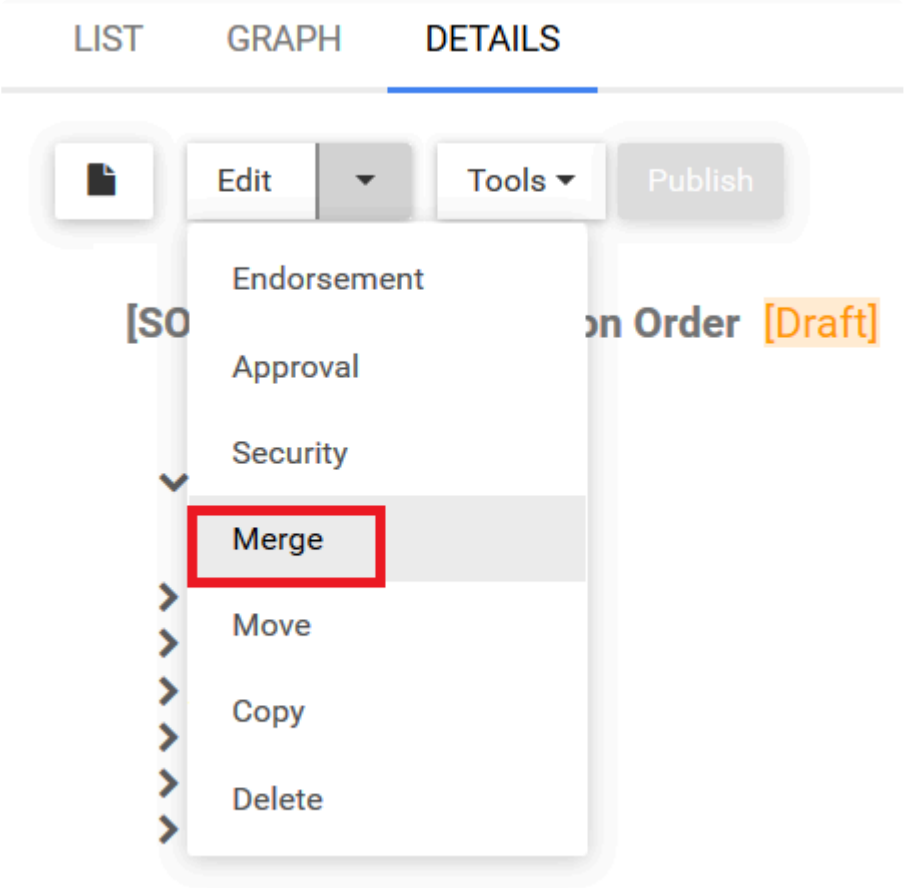
1. Remove duplicated items
2. Consolidate similar items
3. Adjust EPC content based on corporate restructurings and item re-definition

Within the Documents Module users can

1. Merge Documents

> Please note that you can only Merge identical objects (i.e. KPIs can be merged with other KPIs, Objectives can be merged with other Objectives)

Users can find this feature on the details page of items. For further instructions on how to use our **Merge** feature, please see the work instructions here.



12.5.9 Generate Document Books

Your EPC now features object book generation, allowing you to leverage your EPC to dynamically create object specific reports and documents. After your editors have created and uploaded document templates you can now uses these templates for the following modules:

These reports can be generated at:

a) The object level – allowing you to create reports about a specific object

b) The folder, process or org unit level – allowing you to create reports about objects INCLUDING there child objects

c) The Set level – allowing you to create large, summary documents including their child objects

For more information on how to generate object books, click here

12.5.10 Document Object Endorsement Cycle

Web Modelers can set Endorsement Cycle on Document Objects.
To learn how to set Endorsement Cycles, click here

12.6 Risk Edit

Risks of all levels can be documented, organized into library structures and communicated to stakeholders via the Web App. The EPC allows users to manage the risks that affect and influence the organization, as well as to identify, monitor, and measure them.

Users given the permission to be Web Modelers, can create and edit Risk objects directly on the WebApp.

The Risk Edit section will cover the following:

1. Create Risk Objects
2. Edit Risk Objects
3. Delete Risk Objects
4. Publish Risk Objects
5. Risk Approval Cycle
6. Risk Security

12.6.1 Create Risk Objects

Web Modelers can create new Risk Objects on the Web App. These objects can be Risk Sets, Risk Folders, and Risks. Web Modelers can create new Risk objects by clicking on the button NEW or directly through the Details Page of a Risk Set or Risk Folder.

The Create Risk Objects section will cover the following:

1. Create a Risk Set
2. Create a Risk Folder
3. Create a Risk

12.6.1.1 Create a Risk Set

Risk Sets store all risks within the organization's database. Risk Sets enable Web Modelers to organize an organization's risks in a hierarchical structure, and have a centralized repository.

Web Modelers can create new Risk Sets on the WebApp.

To Create a New Risk Set, please follow the Create Sets instructions.

12.6.1.2 Create a Risk Folder

A Risk Folder contains Risk objects. Web Modelers arrange Risk Folders in a manner that is the most appropriate to the organization's structure and use them as organization tools.

Risk Folders are found within a Set or Folder (as a sub-folder) and are arranged in a hierarchical structure to simplify navigation and organization. It is recommended to organize Risk folders by having Folders for each Organization Unit or Folders for each Value Stream/Process.

Web Modelers can create new Risk Folders on the WebApp.

To create Risk Folders, please follow Create Folders instructions.

12.6.1.3 Create a Risk

A Risk is an EPC object that models potential risks within an enterprise.Risks can come from uncertainty in financial markets, project failures, legal liabilities, credit risk, accidents, natural causes and disasters as well as deliberate attacks from an adversary. 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.

Web Modelers can create Risks on the WebApp and organize them within Risk Folders.

For instructions on how to create a new Risk, see the Create Objects section.

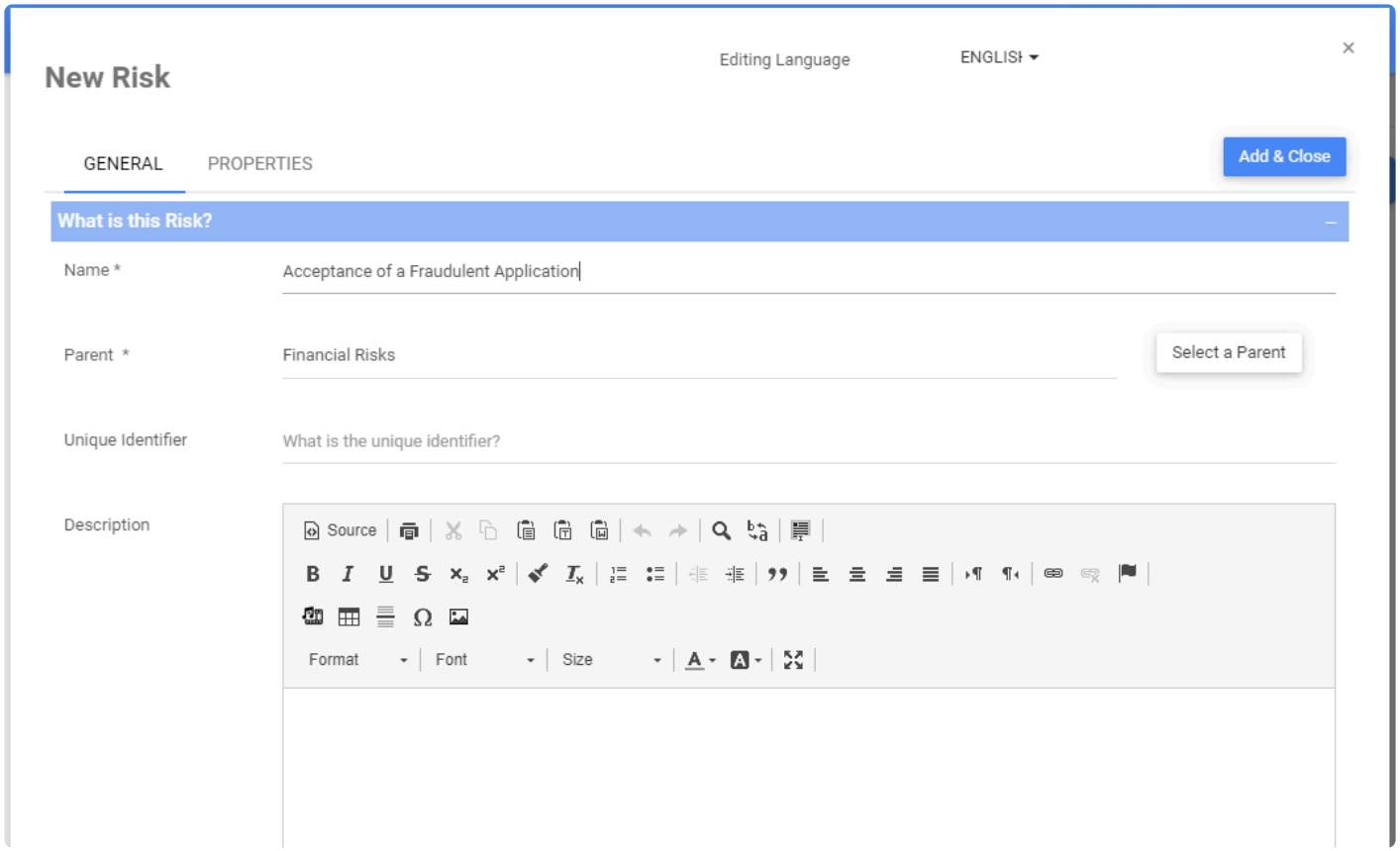
Filling out a New Risk form

> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

1. Type the name of the Risk on the “What is the name?” field

> It is **mandatory** for Web Modelers to input a name for the Risk

For this example, the name of the Risk is “Acceptance of a Fraudulent Application”

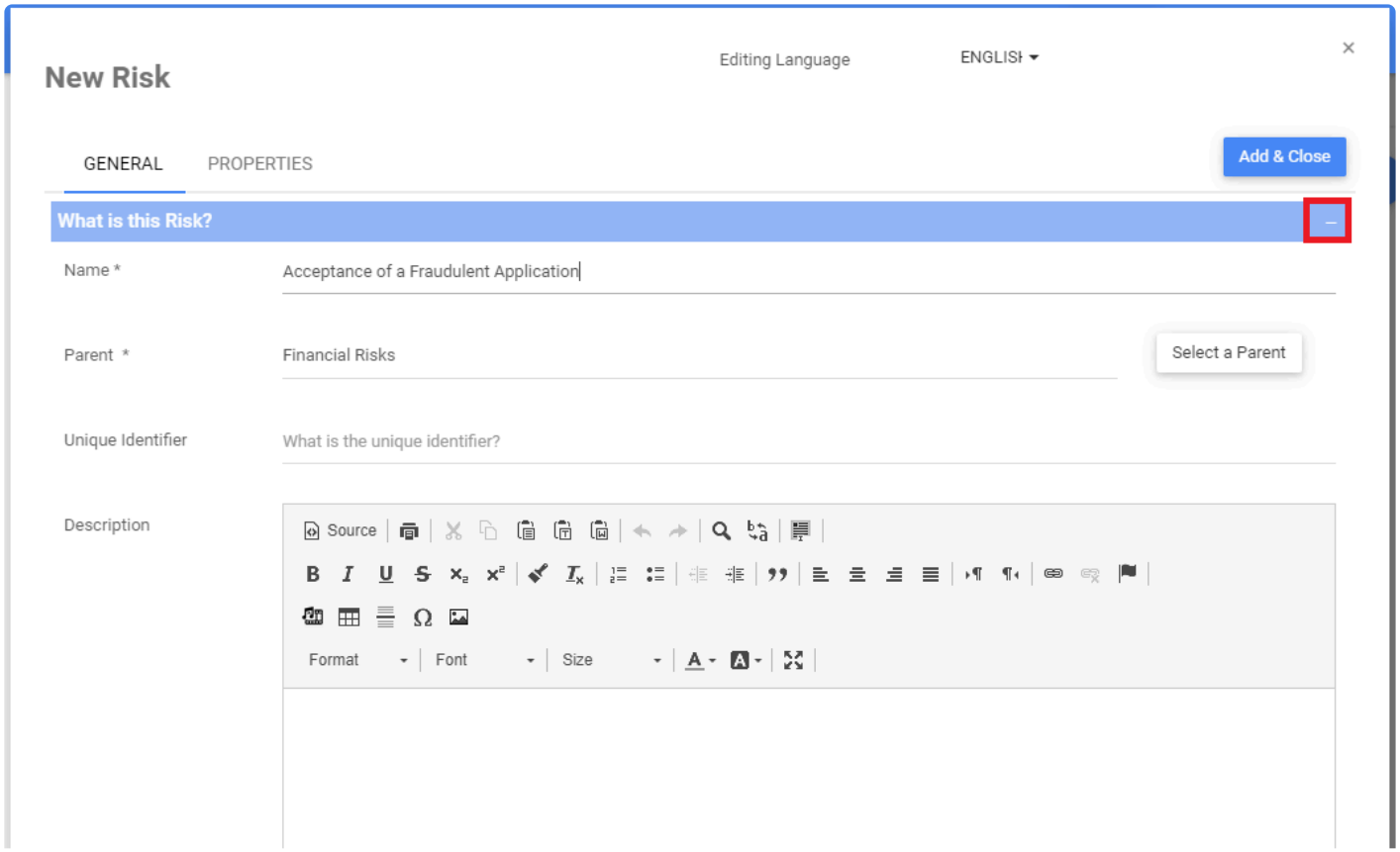


The EPC automatically assigns the Risk Folder as the Parent, which is the folder or sub-folder you selected. The Parent field is blocked and cannot be edited.

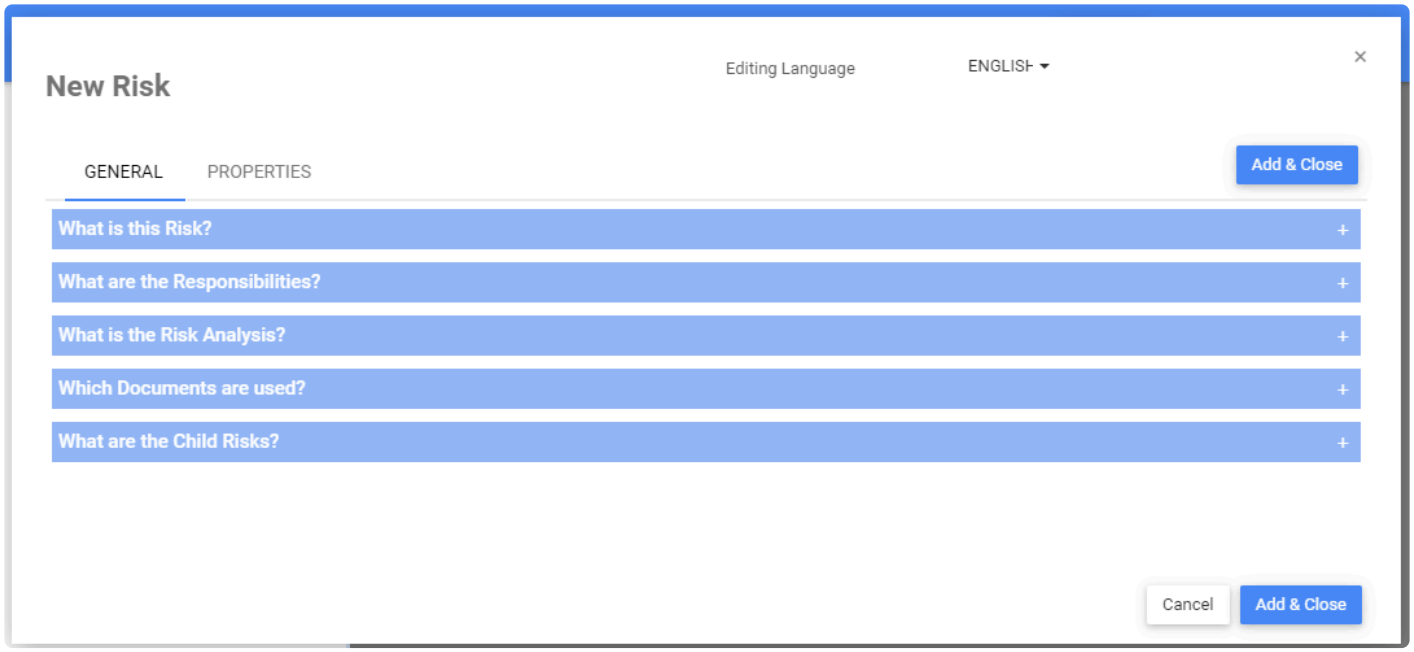
2. Use the + and − icons to expand and hide the different sections within each tab of the New Risk Window. Input the right information about the Risk in each section.

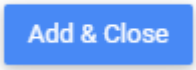
The new Risk window has two tabs, General and Properties. Under each tab there are different sections where the Web Modeler can input detailed information about the Risk. To learn more about about each section and how to input information, click here

i) To hide sections, click on the − icon:



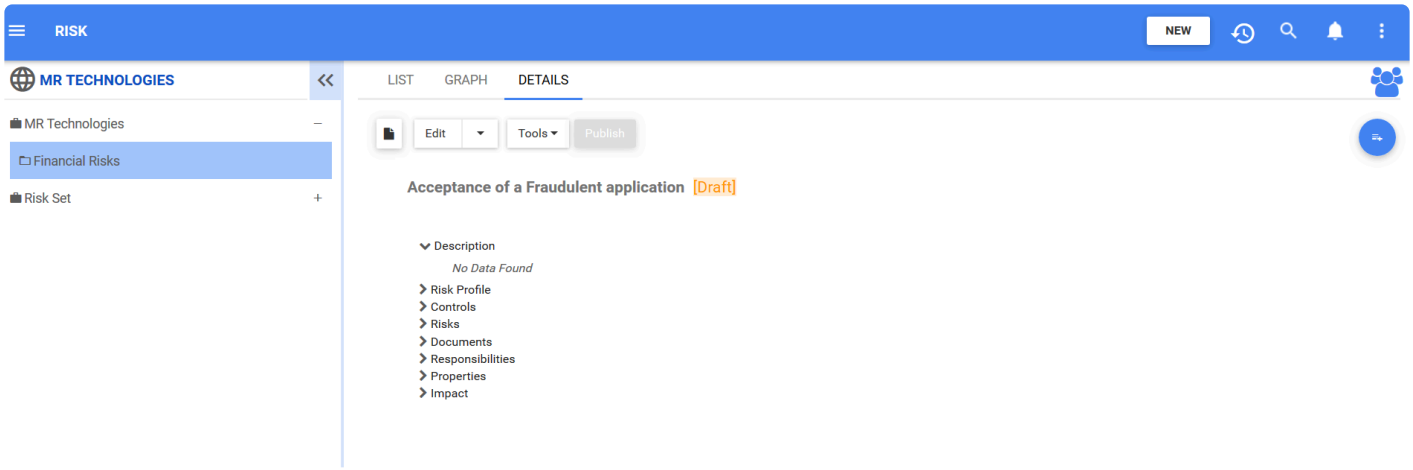
ii) To expand sections, click on the + icon:



3. Click on the button 

to create the Risk

4. The new Risk “Acceptance of a fraudulent application” is now inside of the “Financial Risks” folder. This Risk is currently a draft. To learn how to publish Risk objects, click here


RISK
NEW
MR TECHNOLOGIES
MR Technologies
Financial Risks
Risk Set
LIST
GRAPH
DETAILS
Edit
Tools
Publish
Acceptance of a Fraudulent application [Draft]
Description
No Data Found
Risk Profile
Controls
Risks
Documents
Responsibilities
Properties
Impact

12.6.2 Edit Risk Objects

Web Modelers can edit the Details of Risk Objects. They need to navigate to the Edit button of the object to access the Edit Details window. The Edit Details window has two tabs, General and Properties. Under each tab there are different sections where the Web Modeler can input detailed information about the Risk object.

Web Modelers can choose the editing language in the Edit Details window.

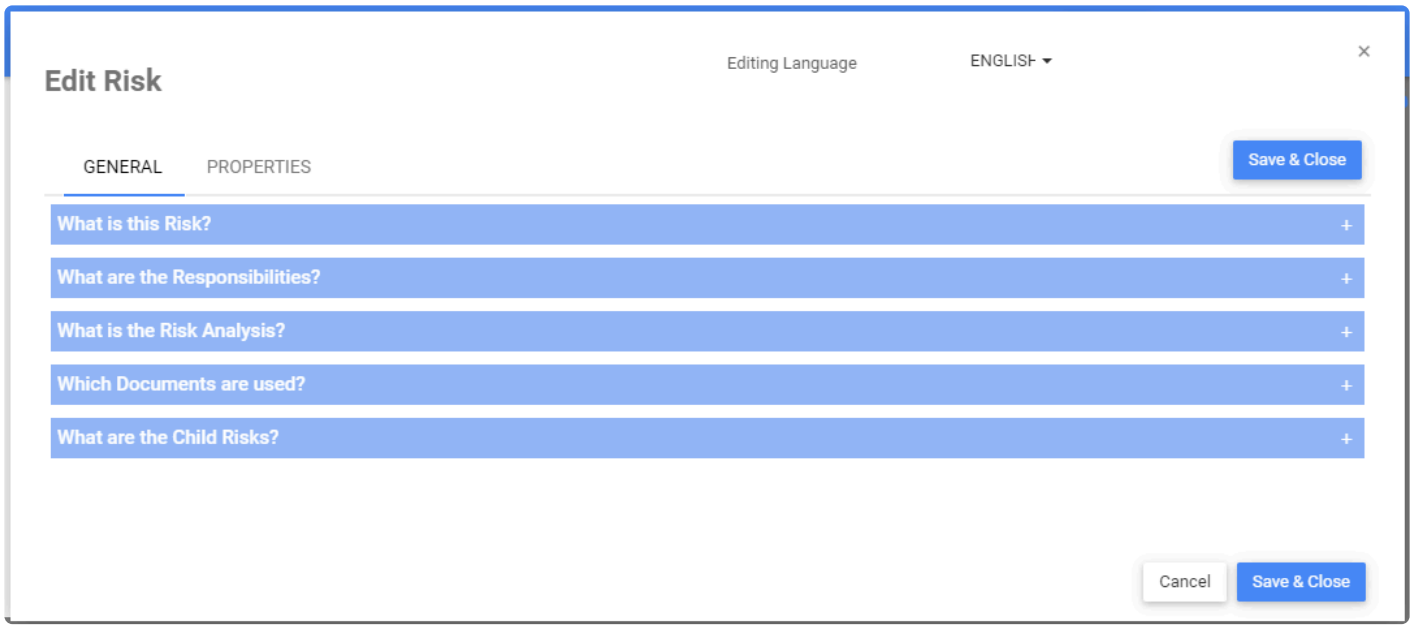
Only users with the Web Modeler Permission will be able to see the Edit Button on the toolbar; the displayed content needs to be set to Show Latest, and the editing tool is the Web.

This section will cover the following:

1. Edit Risk General Details
2. Edit Risk Properties Details

12.6.2.1 Edit Risk General Details

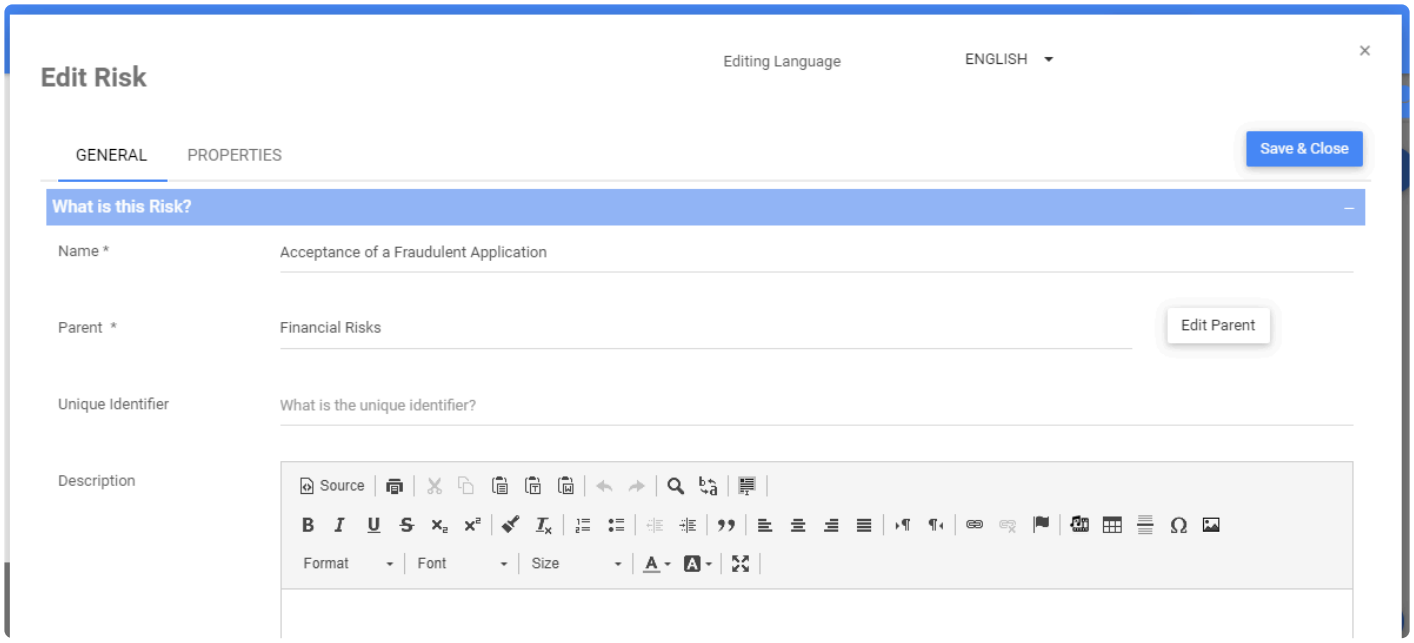
The General tab contains a section for the basic information about the Risk, as well as the Responsibilities and Associations sections.



What is this Risk?

This table below describes the fields of this section.

Field	Description
Name	The name of this Risk. The name should summarize what the risk is. A name is **mandatory** for all objects.
Parent Folder	The Folder under which this Risk is nested.
Identifier	The Unique Identifier of this Risk. This serves to uniquely identify the Risk as per your company protocol.
Description	This field describes the Risk in detail. The rich text format allows for text formatting, images, URLs, tables, etc.



Responsibilities and Associations

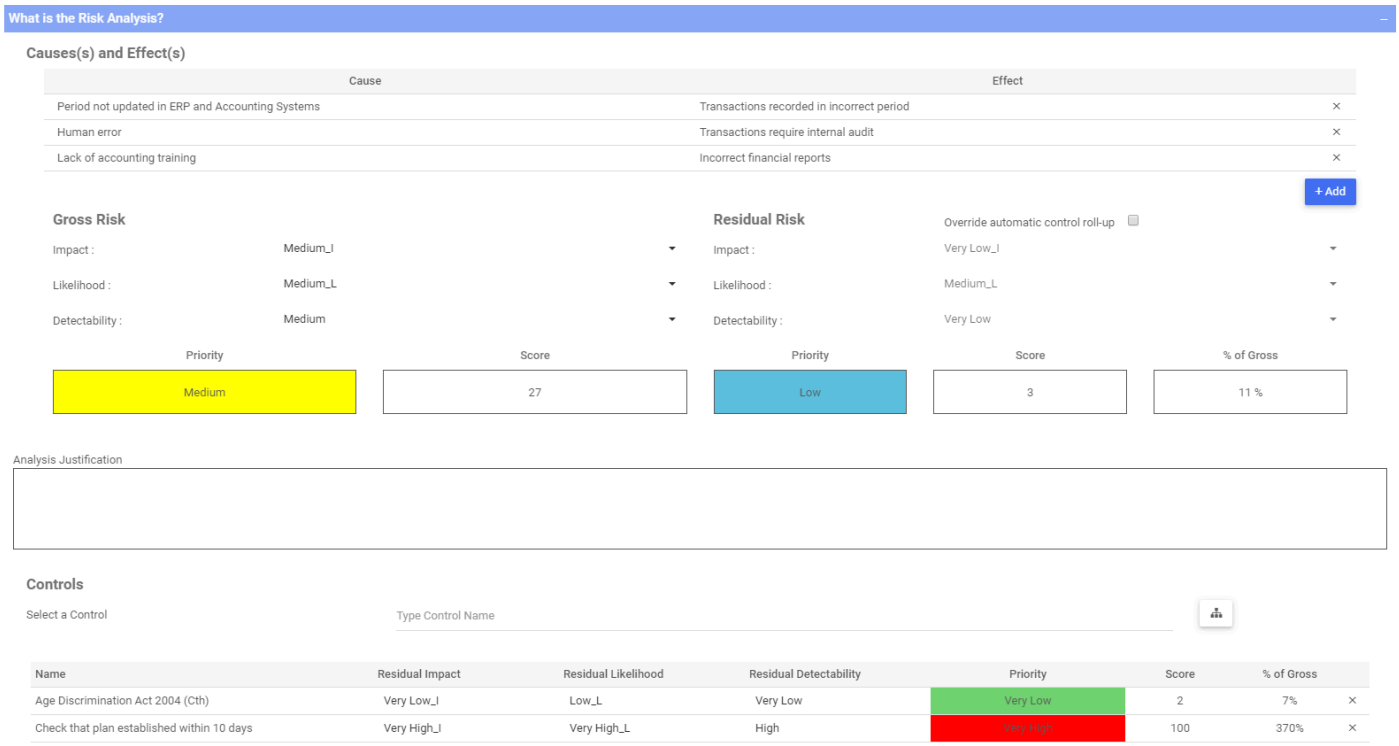
Since the Responsibilities and Associations sections are common to many EPC objects, the instructions have been centralized in the Associations section of the user manual. You can find direct links to instructions for specific sections below.

Section	Instructions
What are the Responsibilities?	Assign Responsibilities
Which Documents are used?	Associate Documents
What are the Child Risks?	Associate Risks

12.6.2.2 Risk Analysis

The EPC allows users to analyze, quantify and manage their organziational risks throught the Risk Analysis section in the Risk Module. This Risk Analysis component allows users to:

1. Input Causes & Effects of Risks
2. Calculate Gross Risk Scores
3. Associate Controls to Risks
4. Calculate Residual Risk Scores
5. Override Residual Risk Scores



12.6.2.2.1 Edit Causes & Effects

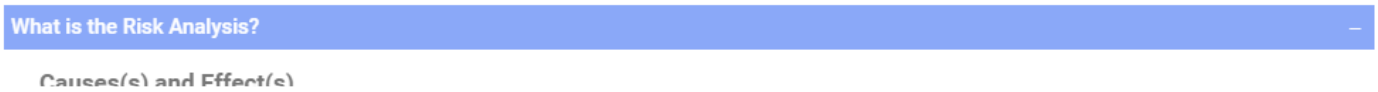
EPC's Risk Module allows users to input the Causes & Effects of Organizational risks, allowing Risk Managers to understand how risks behave in their organizations. Understanding how these risks behave, allows organizational members to view and understand the risks of the company, and where these risks present themselves.

To Edit the Causes & Effects of Risks:

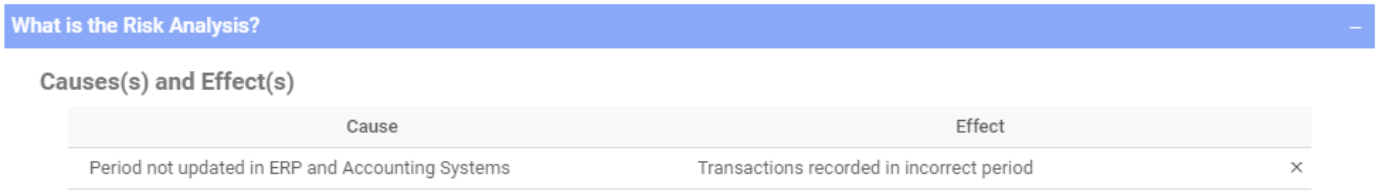
1) Navigate to the details of a Risk

2) Select **Edit**

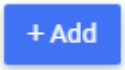
3) Expand the **What is the Risk Analysis** Section



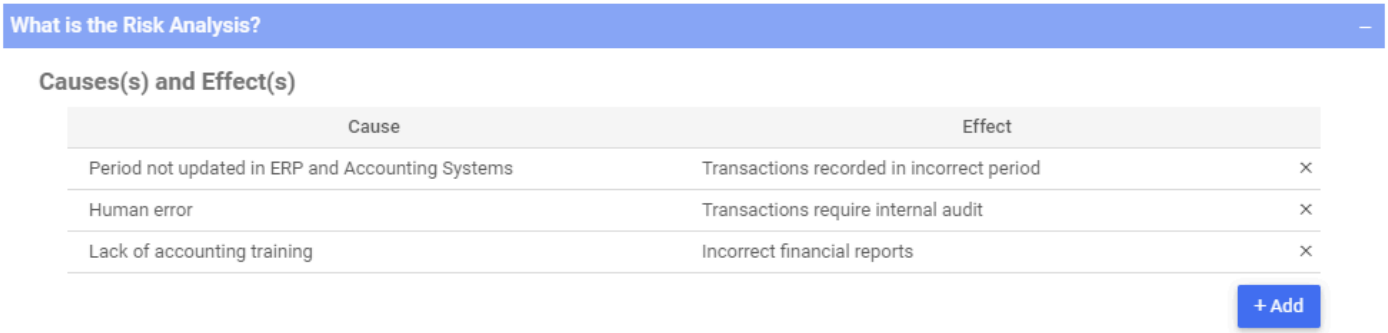
4) Click on the section you wish to populate and type in your Causes & Effects



5) To Add additional Causes & Effects, select the Add button



6) View your Causes & Effects



12.6.1.3.1.2 Edit Gross Risk

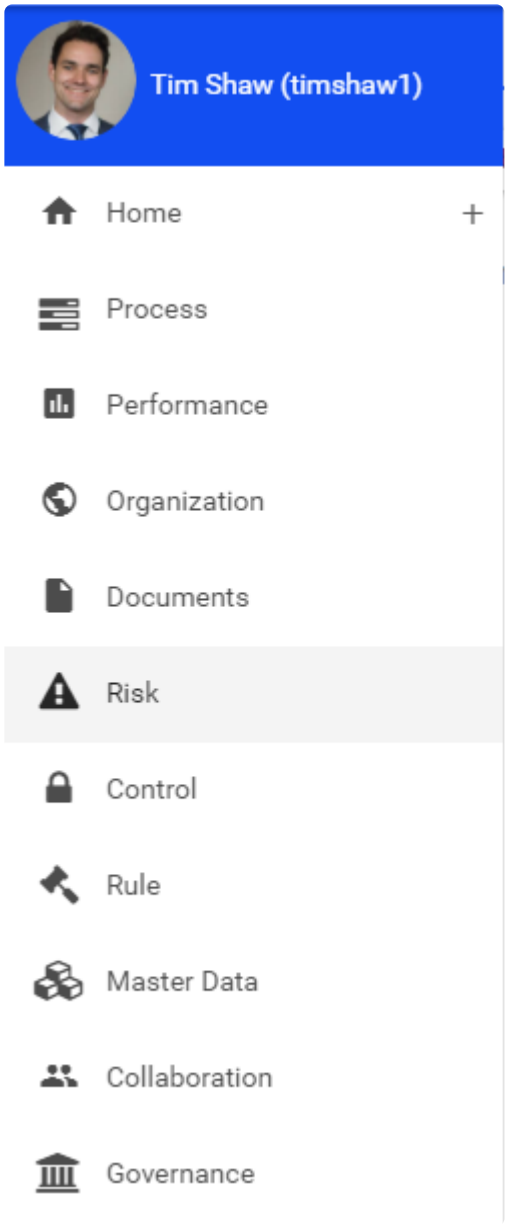
The Enterprise Process Center (EPC) provides users with Risk Management, Tracking, Scoring and Analysis capabilities, making the system a fully functional risk management tool. This tool allows users to create and assess Risks, as well as analyze the relationship that Risks have with Controls and Processes.

Key Definitions
Gross Risk: The risk to the company in the absence of any actions (e.g. Business Rules, Controls)
Residual Risk: The risk to the company remaining after corrective actions have been implemented to reduce the impact and likelihood, and increase the detectability of a risk within the organization
Impact (Risk): Severity of the consequences varies in terms of cost and potential loss on health, human life, or other critical factors.
Likelihood (Risk): Probability of occurrence
Detectability (Risk): The probability of detecting the fallout and/or consequences associated with the Risk

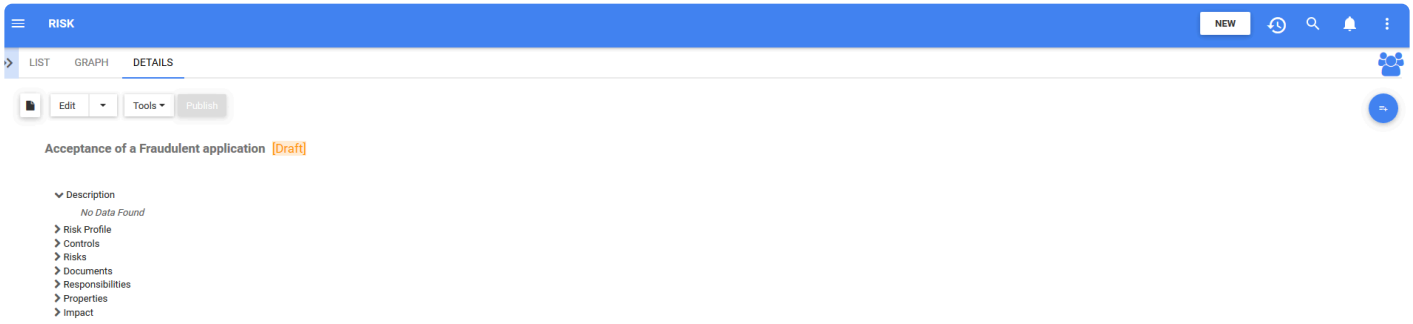
After creating a risk in the system, users can go in and define the Gross Risk Scores based on parameters defined by your System Administrators. When scoring Risks, users can set the values for Impact, Likelihood and Detectability, which in turn will calculate a Gross Risk Score, representing the aggregate score of the risk prior to corrective action.

To Set the Gross Risk Score

1) Navigate to the Risk Module

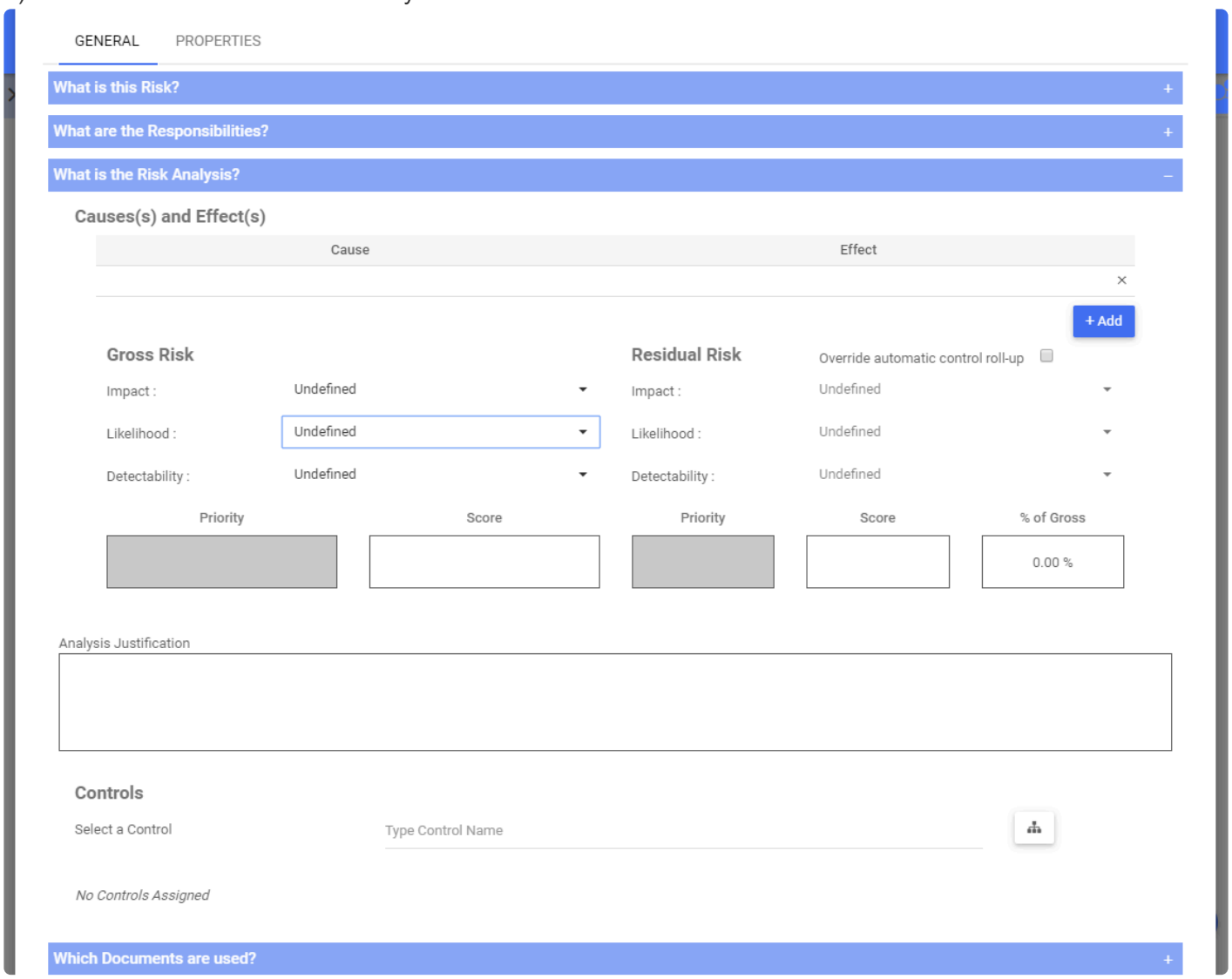


2) Select the Risk you wish to utilize and navigate to the object's Details page

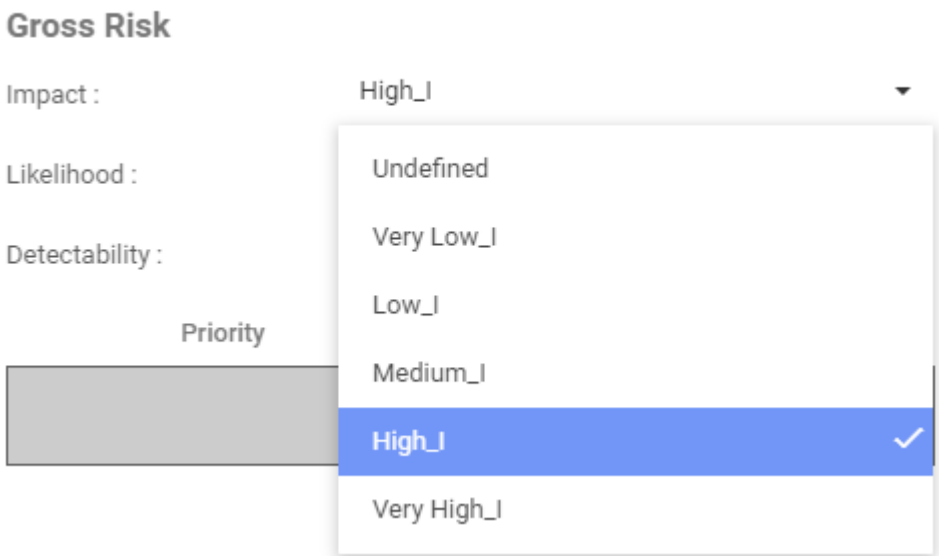


3) Click on the 'Edit' button to open the Edit form for the object

4) Select the 'What is the Risk Analysis' section

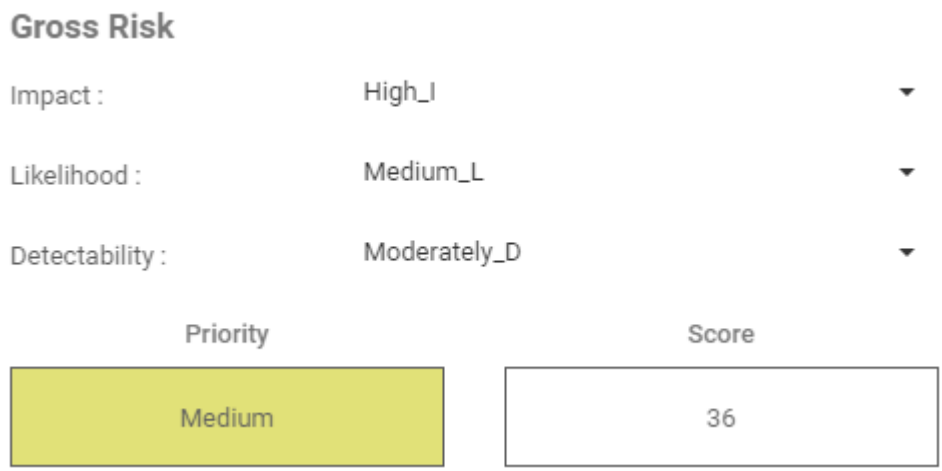


5) Within the form, set values for Impact, Likelihood and Detectability



Note that if you do not set a value for Impact or Likelihood, a score will not be generated.

6) Observe the score generated under the Gross Risk section.



7) Click ‘Save’ to save your changes for the Risk.

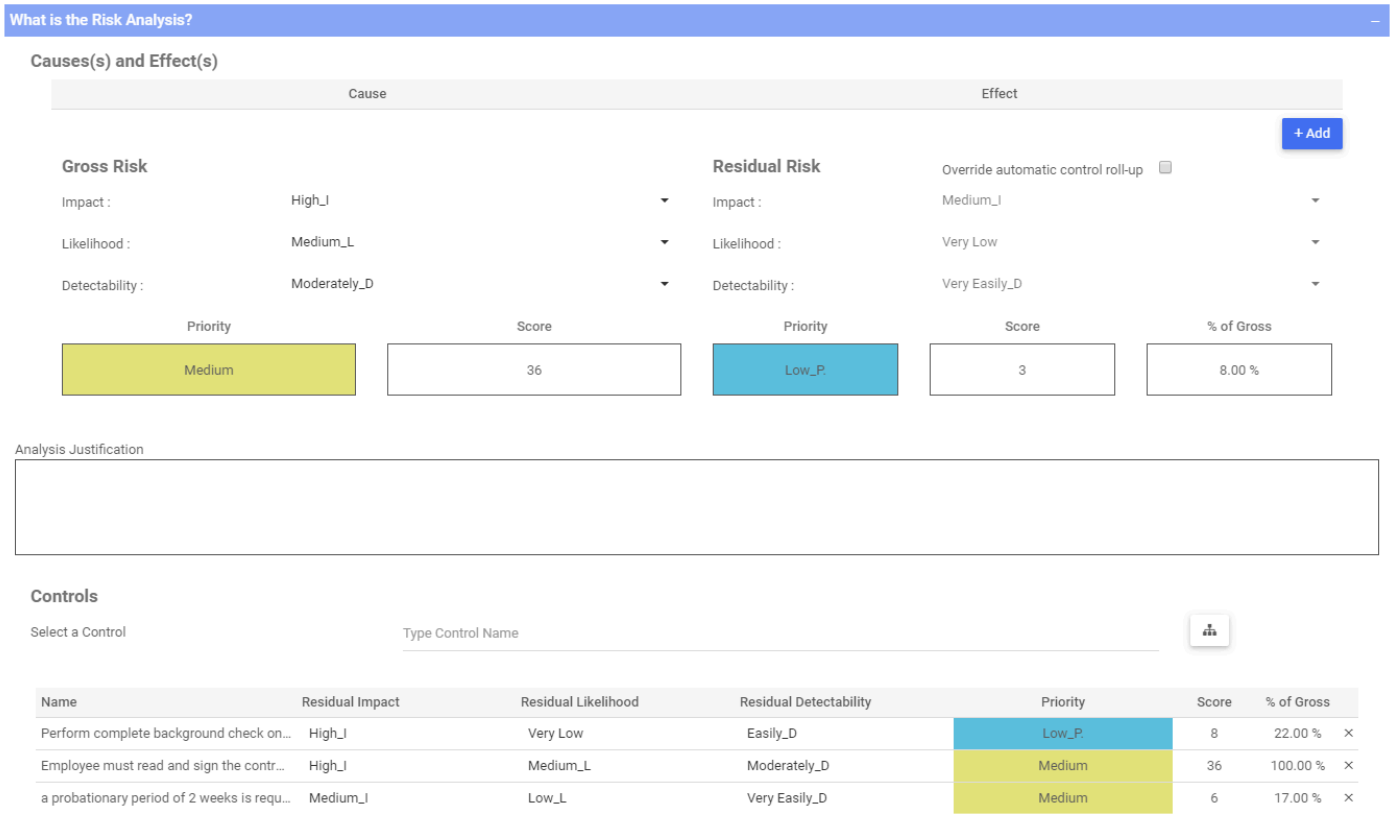
12.6.1.3.1.3 Edit Residual Risk

The Enterprise Process Center (EPC) provides users with Risk Management, Tracking, Scoring and Analysis capabilities, making the system a fully functional risk management tool. This tool allows users to create and assess Risks, as well as analyze the relationship that Risks have with Controls and Processes.

Key Definitions
Gross Risk: The risk to the company in the absence of any actions (e.g. Business Rules, Controls)
Residual Risk: The risk to the company remaining after corrective actions have been implemented to reduce the impact and likelihood, and increase the detectability of a risk within the organization
Impact (Risk): Severity of the consequences varies in terms of cost and potential loss on health, human life, or other critical factors.
Likelihood (Risk): Probability of occurrence
Detectability (Risk): The probability of detecting the fallout and/or consequences associated with the Risk

Within the EPC, there are 2 ways to calculate Residual Risk Scores within the EPC

1. **System Generated Calculation**: After determining the values for your Gross Risk Score, you apply controls which allow you to determine the residual values for Impact, Likelihood and Detectability. The EPC takes these residual values and calculates your Residual Risk Scores. For work instructions on applying Controls, see the section here.
2. **Manual Override Rollup**: Users can override the system calculation and determine their own residual values for Impact, Likelihood and Detectability. These values are used to determine the Residual Risk Scores. For work instructions on how to override the system generated score, see the section here.



Note that to change to Residual Risk values you will have to either 1) Apply controls or 2) Override the Risk Score

12.6.1.3.1.4 Assign Controls to Risks

The Enterprise Process Center (EPC) provides users with Risk Management, Tracking, Scoring and Analysis capabilities, making the system a fully functional risk management tool. This tool allows users to create and assess Risks, as well as analyze the relationship that Risks have with Controls and Processes.

Key Definitions
Gross Risk: The risk to the company in the absence of any actions (e.g. Business Rules, Controls)
Residual Risk: The risk to the company remaining after corrective actions have been implemented to reduce the impact and likelihood, and increase the detectability of a risk within the organization
Impact (Risk): Severity of the consequences varies in terms of cost and potential loss on health, human life, or other critical factors.
Likelihood (Risk): Probability of occurrence
Detectability (Risk): The probability of detecting the fallout and/or consequences associated with the Risk

Applying Controls to Risks allows companies and users to mitigate how the risk affects the organization. As such, the EPC allows users to apply controls directly to Risks, which in turn allows users to develop a new and updated Score for the risk. When applying controls users can:

1. Update Residual Impact Values
2. Update Residual Likelihood Values
3. Update Residual Detectability Values

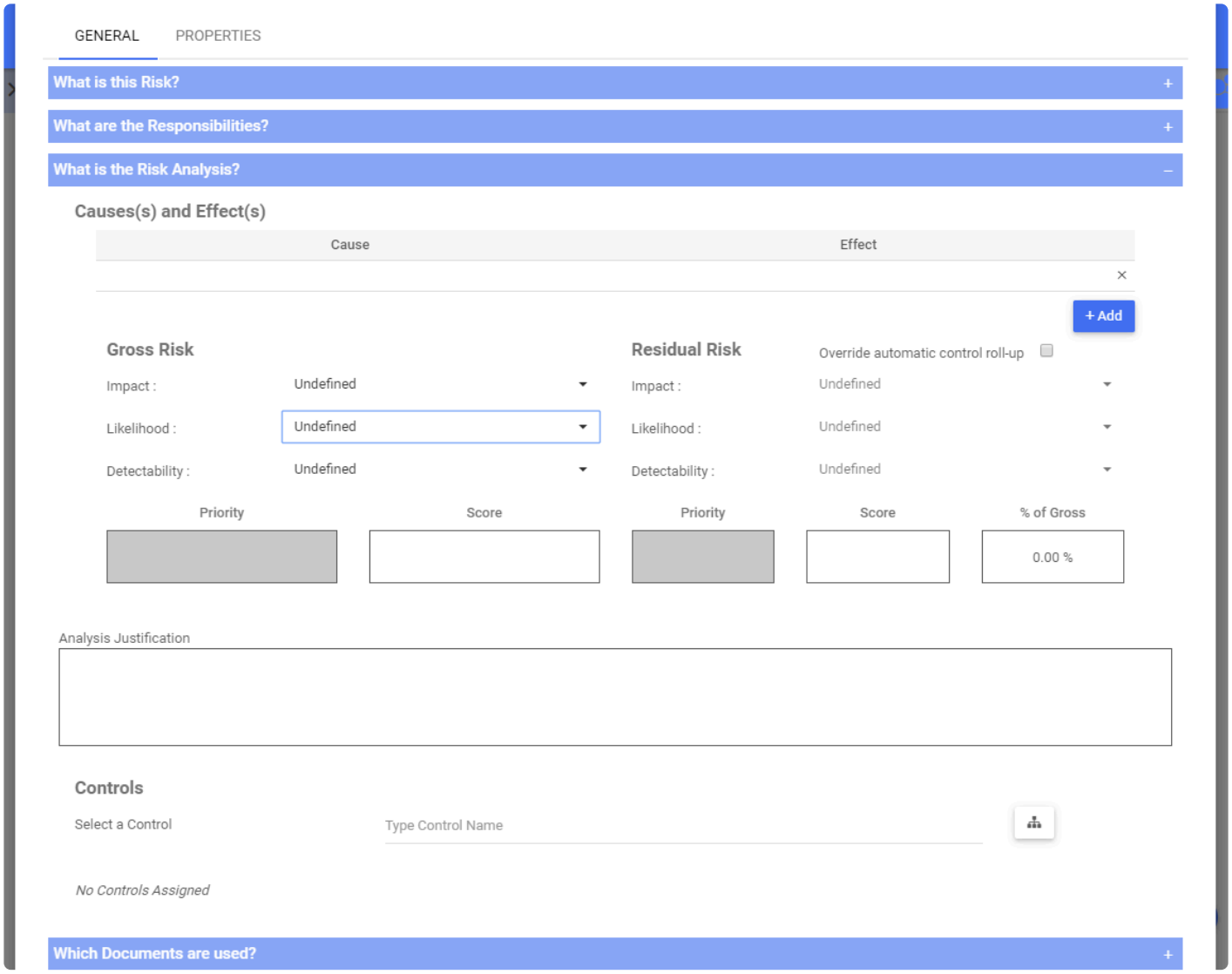
Updating these values will generate the following:

- **Generate a New Priority Score:** This represents the Priority the Risk has after the specific control is applied
- **Generate a New Score for the Control:** This Score reflects the Residual Risk Score that would apply if ONLY this control were applied to the Risk
- **Generate a % of Gross Score:** This is a percentage of the Residual score of the specific control relative to the Gross Risk Score
- **Update the Residual Risk Scores**: These updates are leveraged by the system to generate a system calculated Residual Risk Score

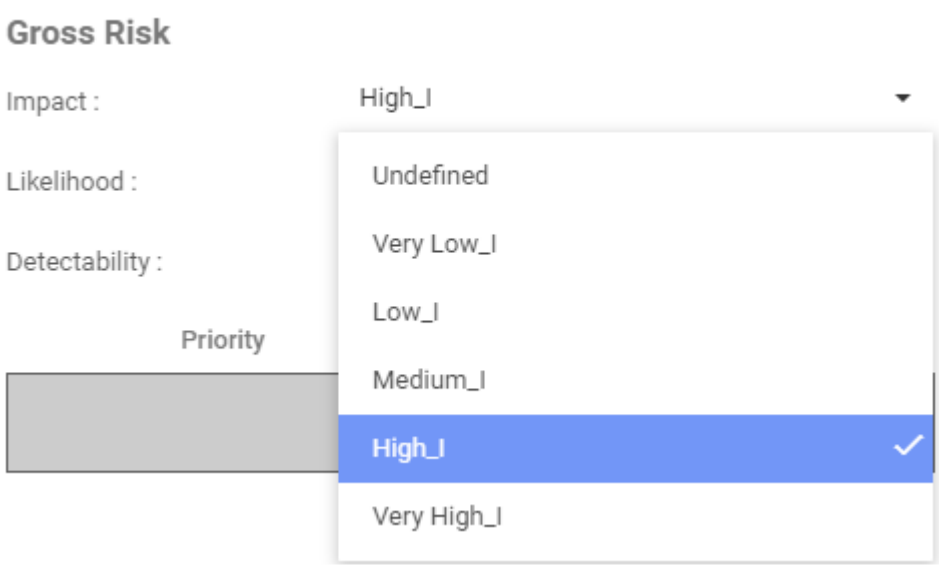
To apply Controls to Risks:

1) Open the Edit form for the Risk you wish to use by clicking on the ‘Edit’ button

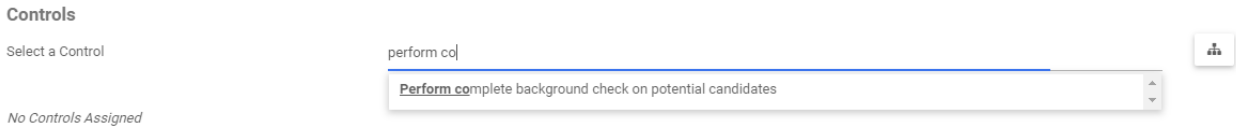
2) Expand the ‘What is the Risk Analysis’ section



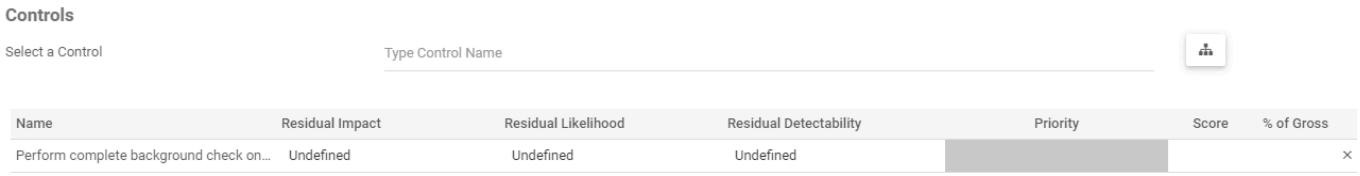
3) Input your Gross Risk values for Impact, Likelihood and Detectability



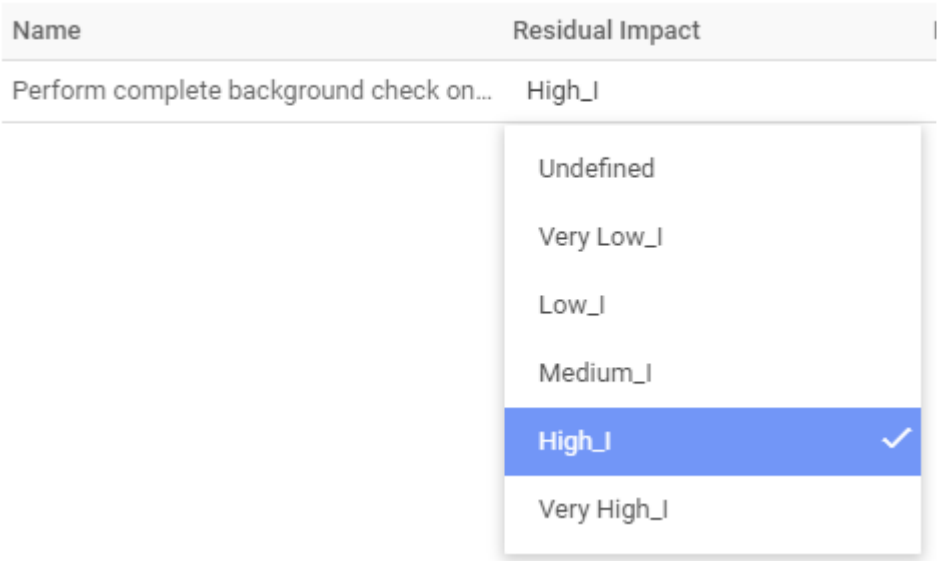
4) In the ‘Select a Control’ bar, type to search for the control you wish to add or use the **Object Selector** to find the Control you wish to apply

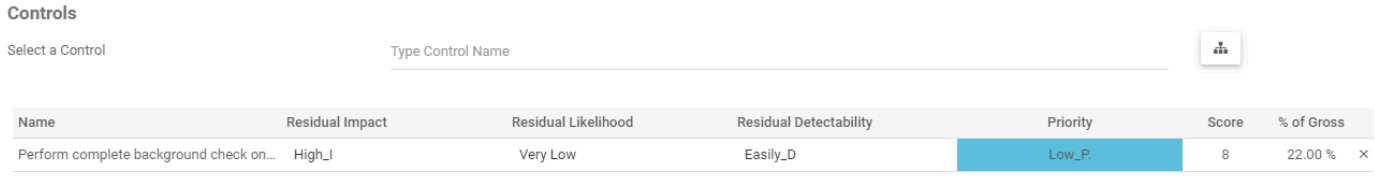


5) Click on the Control you wish to apply



6) Click on the sections under ‘Residual Impact, Likelihood and Detectability’ to assess the new Residual Values using the dropdown





7) Repeat the steps until you have added all the Controls you wish to apply

Controls

Select a Control Type Control Name

Name	Residual Impact	Residual Likelihood	Residual Detectability	Priority	Score	% of Gross	
Perform complete background check on...	High_I	Very Low	Easily_D	Low_P.	8	22.00 %	×
Employee must read and sign the contr...	High_I	Medium_L	Moderately_D	Medium	36	100.00 %	×
a probationary period of 2 weeks is requ...	Medium_I	Low_L	Very Easily_D	Medium	6	17.00 %	×

8) Review the scores and the newly generated Residual Risk Scores above

What is the Risk Analysis?

Causes(s) and Effect(s)

Cause	Effect

+ Add

Gross Risk

Impact : High_I

Likelihood : Medium_L

Detectability : Moderately_D

Priority	Score
Medium	36

Residual Risk

Override automatic control roll-up

Impact : Medium_I

Likelihood : Very Low

Detectability : Very Easily_D

Priority	Score	% of Gross
Low_P.	3	8.00 %

Analysis Justification

Controls

Select a Control Type Control Name

Name	Residual Impact	Residual Likelihood	Residual Detectability	Priority	Score	% of Gross	
Perform complete background check on...	High_I	Very Low	Easily_D	Low_P.	8	22.00 %	×
Employee must read and sign the contr...	High_I	Medium_L	Moderately_D	Medium	36	100.00 %	×
a probationary period of 2 weeks is requ...	Medium_I	Low_L	Very Easily_D	Medium	6	17.00 %	×

9) Click ‘Save’ to save your changes to the risk

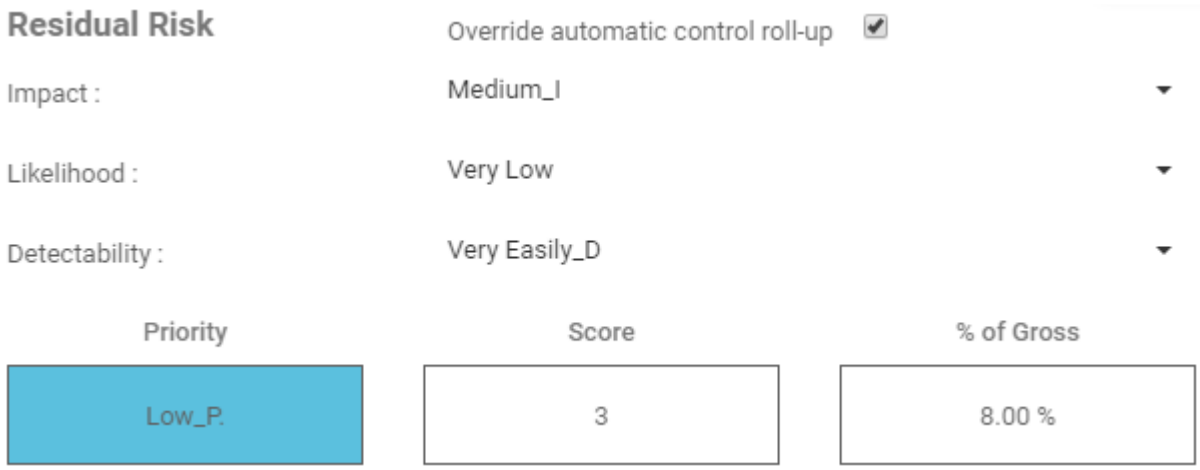
Save

12.6.1.3.1.5 Residual Risk Override

The Enterprise Process Center (EPC) provides users with Risk Management, Tracking, Scoring and Analysis capabilities, making the system a fully functional risk management tool. This tool allows users to create and assess Risks, as well as analyze the relationship that Risks have with Controls and Processes.

Key Definitions
Gross Risk: The risk to the company in the absence of any actions (e.g. Business Rules, Controls)
Residual Risk: The risk to the company remaining after corrective actions have been implemented to reduce the impact and likelihood, and increase the detectability of a risk within the organization
Impact (Risk): Severity of the consequences varies in terms of cost and potential loss on health, human life, or other critical factors.
Likelihood (Risk): Probability of occurrence
Detectability (Risk): The probability of detecting the fallout and/or consequences associated with the Risk

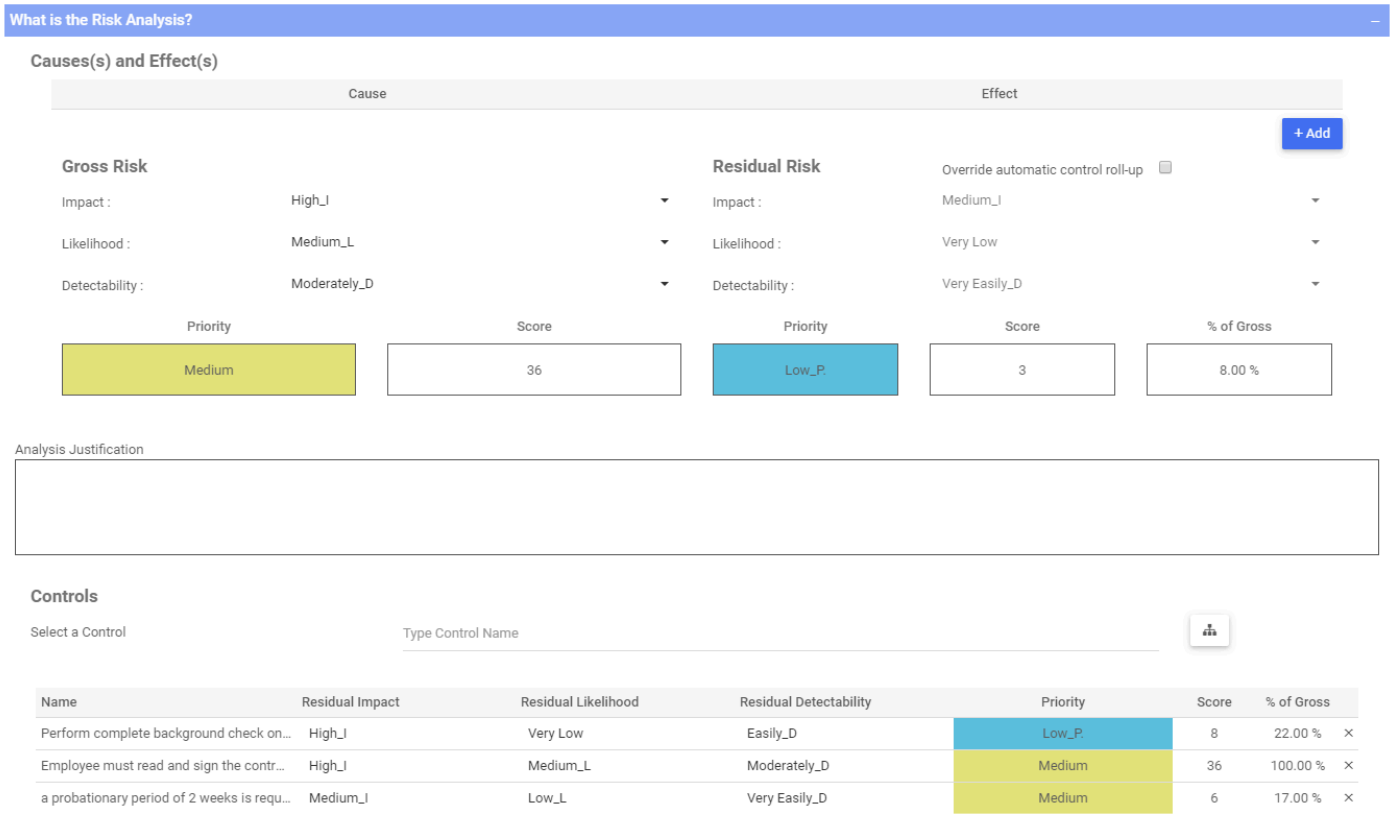
In cases where users desire to set their own Residual Risk Scores (disagree with system score), users can manually override the system generated score and set their own respective Residual Impact, Likelihood and Detectability scores. To do so, users will have to click on the **Override automatic control roll-up** checkbox. This will allow a user to manually set the values they desire.



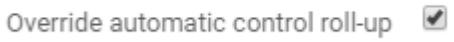
To Override the Residual Risk Scores:

1) Select the Risk you wish to view and open the Edit form by selecting the ‘Edit’ button

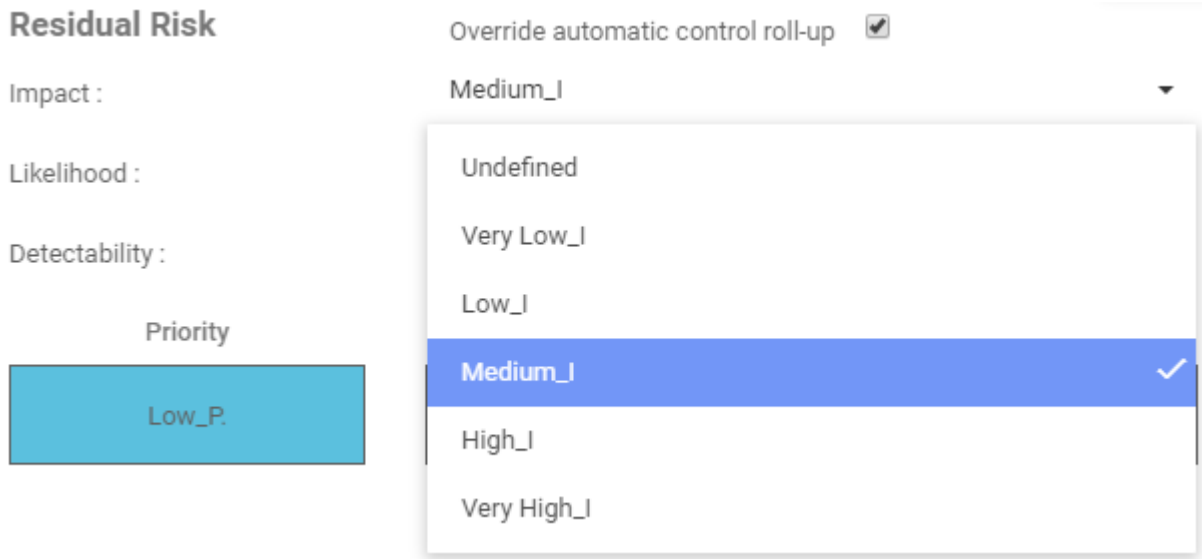
2) Expand the ‘What is the Risk Analysis’ section



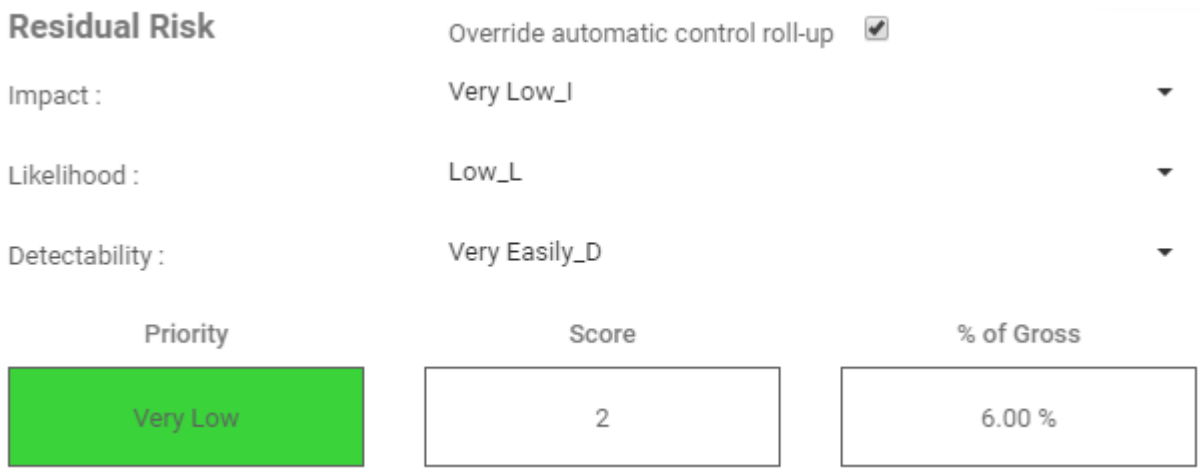
3) Select the **Override automatic control roll-up** checkbox



4) Input your new values for Residual Impact, Likelihood and Detectability



5) Observe and verify your new Residual Risk Scores

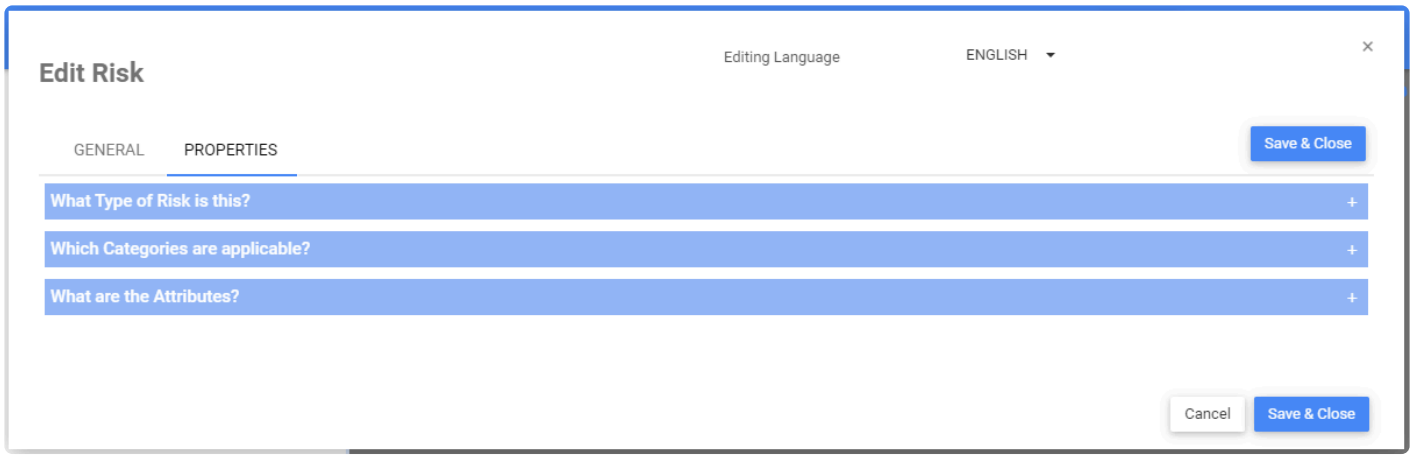


6) Select 'Save' to save the changes made to the risk

Note that by un-checking the **Override automatic control roll-up**, you will revert to the system generated calculation.

12.6.2.3 Edit Risk Properties Details

The Properties tab contains sections for the type, the categories applicable and the attributes.



Since the Properties sections are common to many EPC objects, the instructions have been centralized in the Properties section of the user manual. You can find direct links to instructions for specific sections below.

Section	Instructions
What type of [Object] is this?	Object Type
Which Categories are applicable?	Object Categories
What are the Attributes?	Object Attributes

12.6.3 Delete Risk Objects

Web Modelers can Delete Risk Objects if they have Delete security permission.

To learn how delete objects, click here

12.6.4 Publish Risk Objects

Once Web Modelers finished creating Risk Objects, they can publish it and allow all users with rights to view the objects.

To learn how to publish objects, click here

12.6.5 Risk Objects Approval Cycle

Web Modelers can set Approval Cycles on Risk Objects.

To learn how to set Approval Cycles, click here

12.6.6 Risk Objects Security

Web Modelers that are System Admins, Environment Admins, have Full Control Allow permission or have Read + Write + Delete Permission can set security permissions on Risk Objects.

To learn how to set security on an object, click here.

12.6.7 Move Risk Objects

Users can move Risks and Risk Folders within the Risk Module in the EPC.

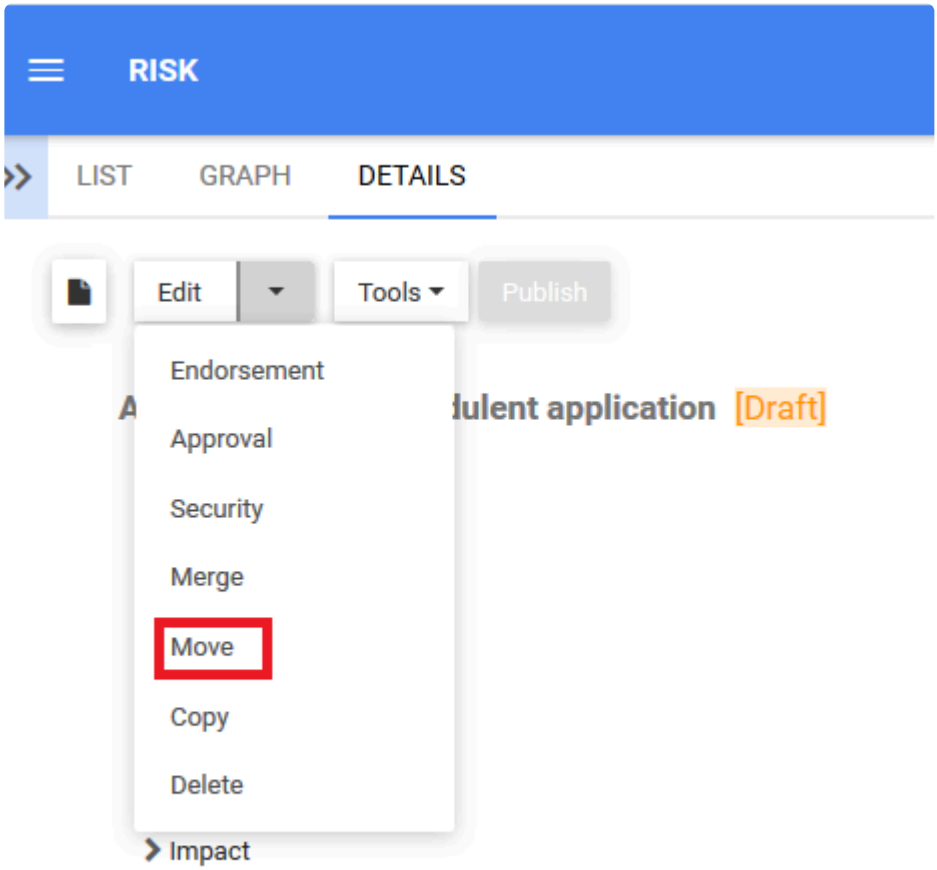
In Edit Mode, Risk Folders can be moved from:

1. Folder to Folder
2. Folder to Set (Vice Versa)

Risks can be moved from

1. Folder to Folder

To move Risk Objects, navigate to the item's details page. Within the "Edit" dropdown, select "Move".



You can find further detail on Moving Objects in the EPC here.

12.6.8 Merge Risk Objects

Users can merge similar objects in the EPC, allowing you to combine multiple objects into one. This action will allow you to remove duplicate items while maintaining their content and relationships in the application.

This capability is typically used in some of the following scenarios:

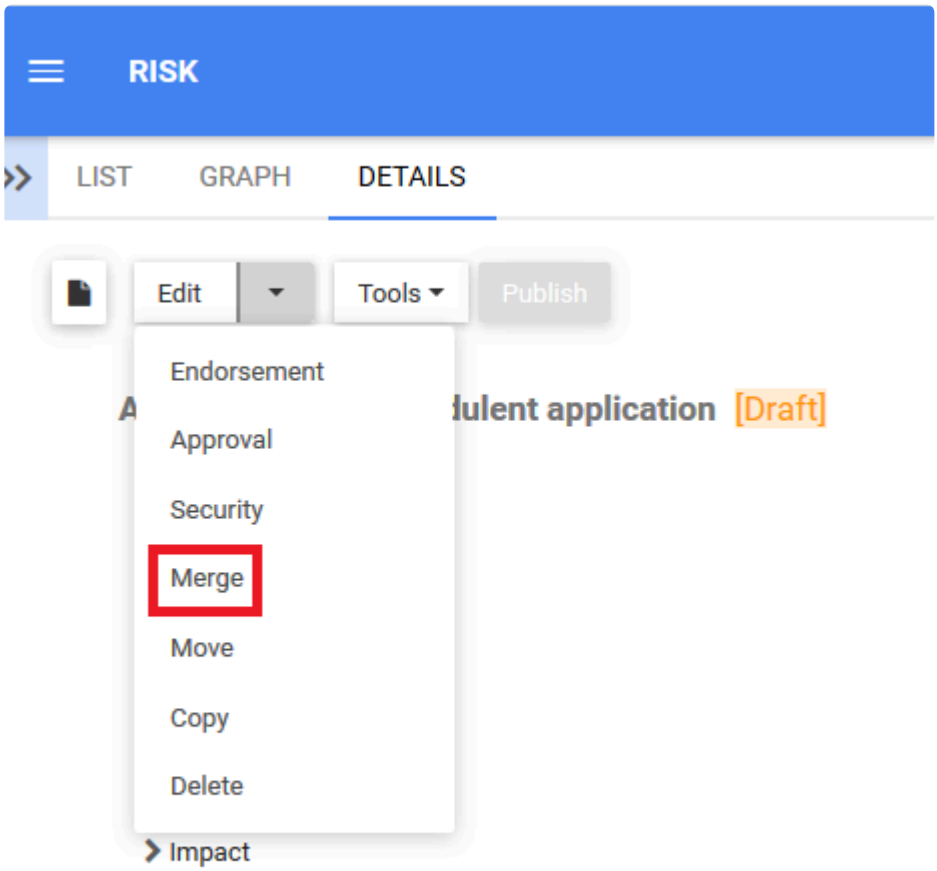
1. Remove duplicated items
2. Consolidate similar items
3. Adjust EPC content based on corporate restructurings and item re-definition

Within the Risk Module users can

1. Merge Risk

> Please note that you can only Merge identical objects (i.e. KPIs can be merged with other KPIs, Objectives can be merged with other Objectives)

Users can find this feature on the details page of items. For further instructions on how to use our **Merge** feature, please see the work instructions here.


RISK
LIST
GRAPH
DETAILS
Edit
Tools
Publish
Endorsement
Approval
Security
Merge
Move
Copy
Delete
Impact
[Draft]

12.6.9 Generate Risk Book

Your EPC now features object book generation, allowing you to leverage your EPC to dynamically create object specific reports and documents. After your editors have created and uploaded [document templates](#) you can now uses these templates for the following modules:

These reports can be generated at:

a) The object level – allowing you to create reports about a specific object

b) The folder, process or org unit level – allowing you to create reports about objects INCLUDING there child objects

c) The Set level – allowing you to create large, summary documents including their child objects

For more information on how to generate object books, click [here](#)

12.6.10 Risk Object Endorsement Cycle

Web Modelers can set Endorsement Cycles on Risk Objects.
To learn how to set Endorsement Cycle, click here

12.7 Control Edit

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.

Users given the permission to be Web Modelers, can create and edit Control objects directly on the WebApp.

The Control Edit section will cover the following:

1. Create Control Objects
2. Edit Control Objects
3. Delete Control Objects
4. Publish Control Objects
5. Control Objects Approval Cycle
6. Control Objects Security

12.7.1 Create Control Objects

Web Modelers can create new Control Objects on the Web App. These objects can be Control Sets, Control Folders, and Controls. Web Modelers can create new Control objects by clicking on the button NEW or directly through the Details Page of a Control Set or Control Folder.

The Create Control Objects section will cover the following:

1. Create a Control Set
2. Create a Control Folder
3. Create a Control

12.7.1.1 Create a Control Set

Control Sets link and store all controls within the organization's database. Control Sets enable Web Modelers to organize an organization's controls in a hierarchical structure, and have a centralized repository.

Web Modelers can create new Control Sets on the WebApp.

To Create a New Control Set, please follow the Create Sets instructions.

12.7.1.2 Create a Control Folder

A Control Folder contains Control objects. Web Modelers arrange Control Folders in a manner that is the most appropriate to the organization's structure and use them as organization tools.

Control Folders are found within a Set or Folder (as a sub-folder) and are arranged in a hierarchical structure to simplify navigation and organization. It is recommended to organize Control folders by having Folders for each Organization Unit or Folders for each Value Stream/Process.

Web Modelers can create new Control Folders on the WebApp.

To create Control Folders, please follow Create Folders instructions.

12.7.1.3 Create a Control

A Control is an EPC object that that models the specific measures implemented to mitigate potential risks within an enterprise. 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.

Web Modelers can create Controls on the WebApp and organize them within Control Folders.

For instructions on how to create a new Control, see the Create Objects section.

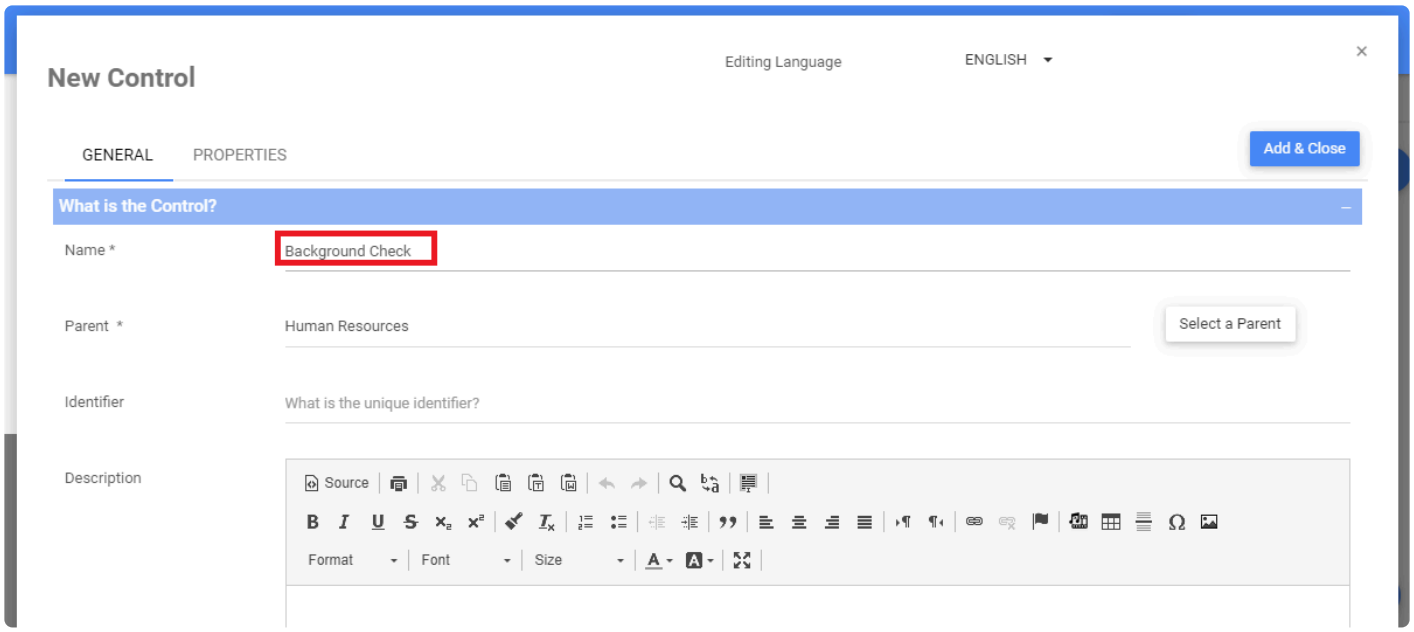
Filling out a New Control form

Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

1. Type the name of the Control on the "What is the name?" field

It is **mandatory** for Web Modelers to input a name for the Control

For this example, the name of the Control is "Background Check"



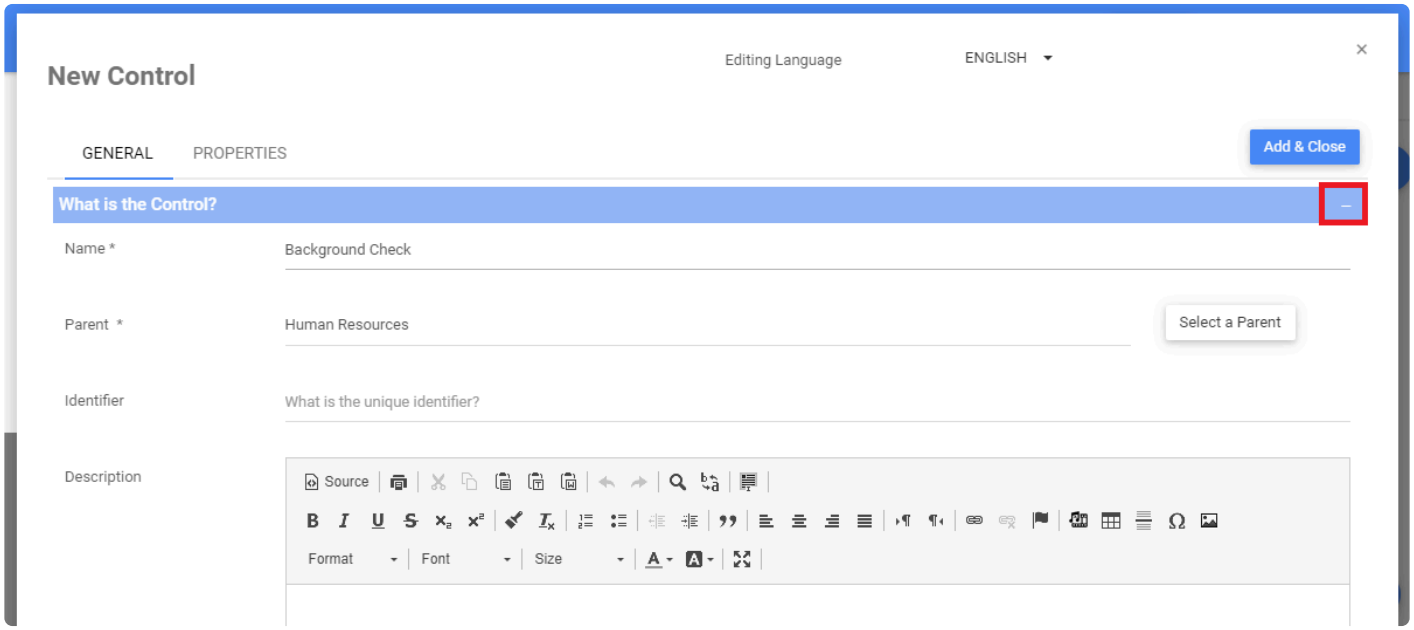
The EPC automatically assigns the Control Folder as the Parent, which is the folder or sub-

folder you selected. The Parent field is blocked and cannot be edited.

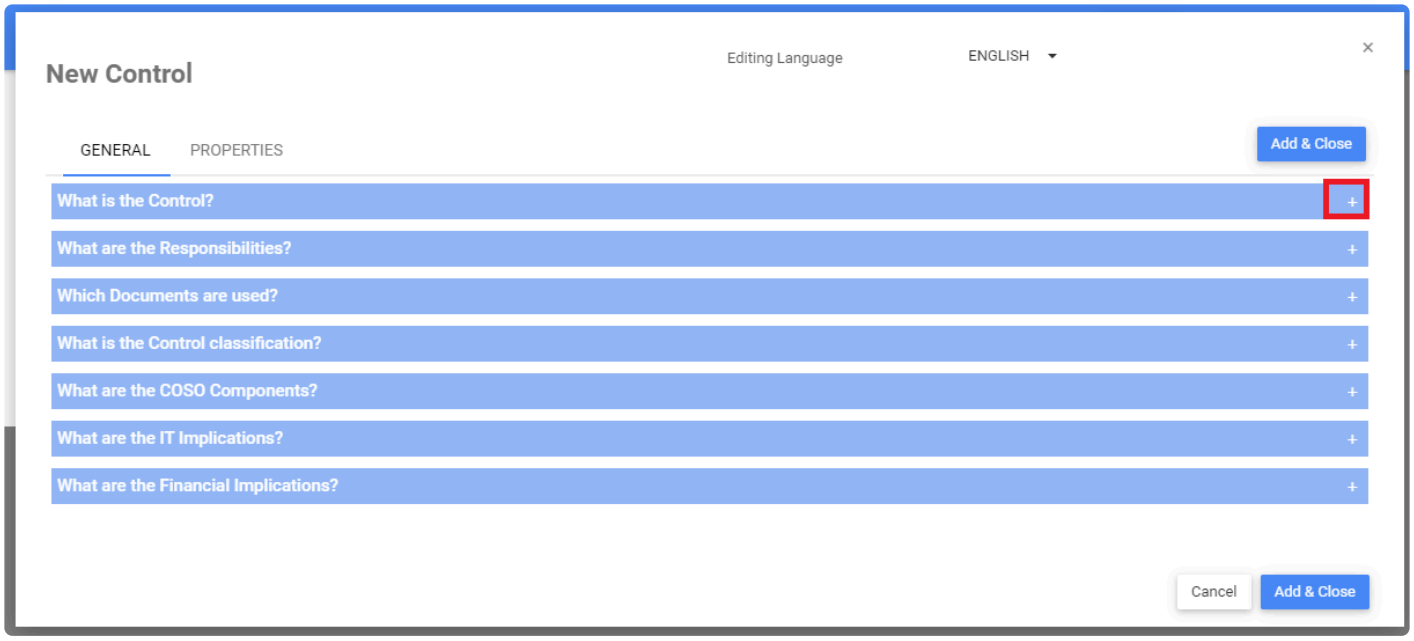
2. Use the + and − icons to expand and hide the different sections within each tab of the New Control Window. Input the right information about the Control in each section.

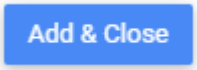
The new Control window has two tabs, General and Properties. Under each tab there are different sections where the Web Modeler can input detailed information about the Control. To learn more about about each section and how to input information, click here

i) To hide sections, click on the − icon:

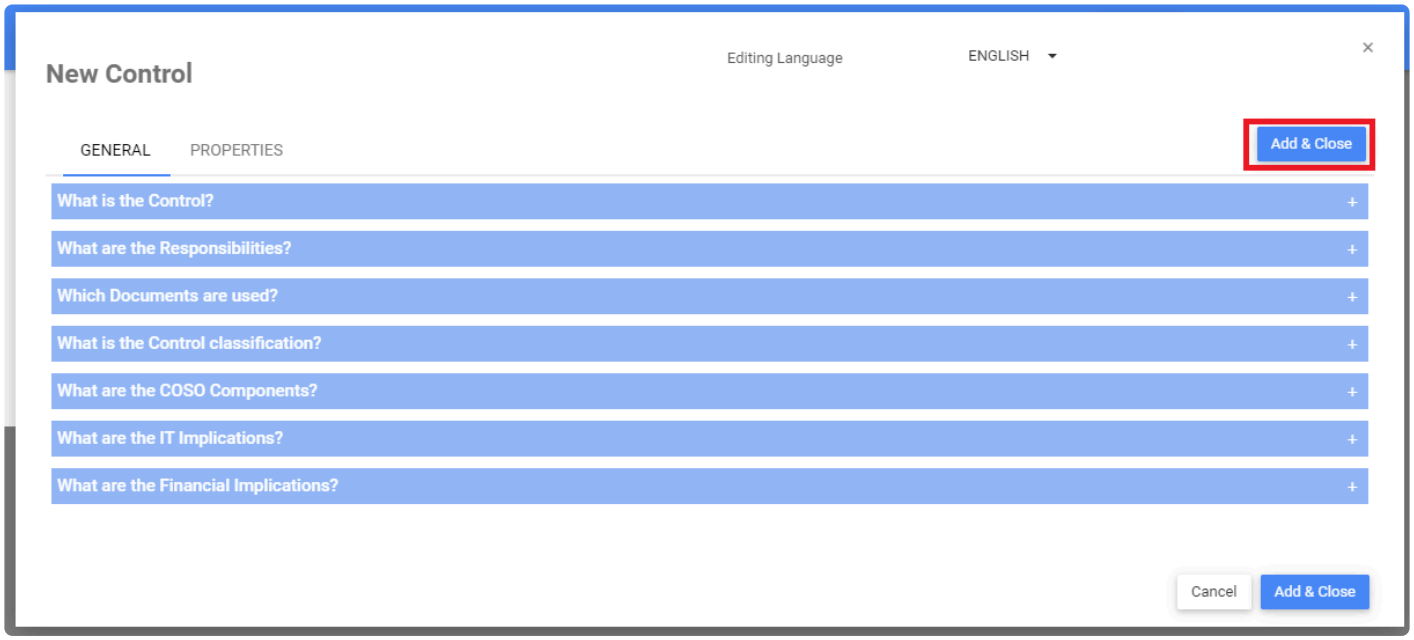


ii) To expand sections, click on the + icon:

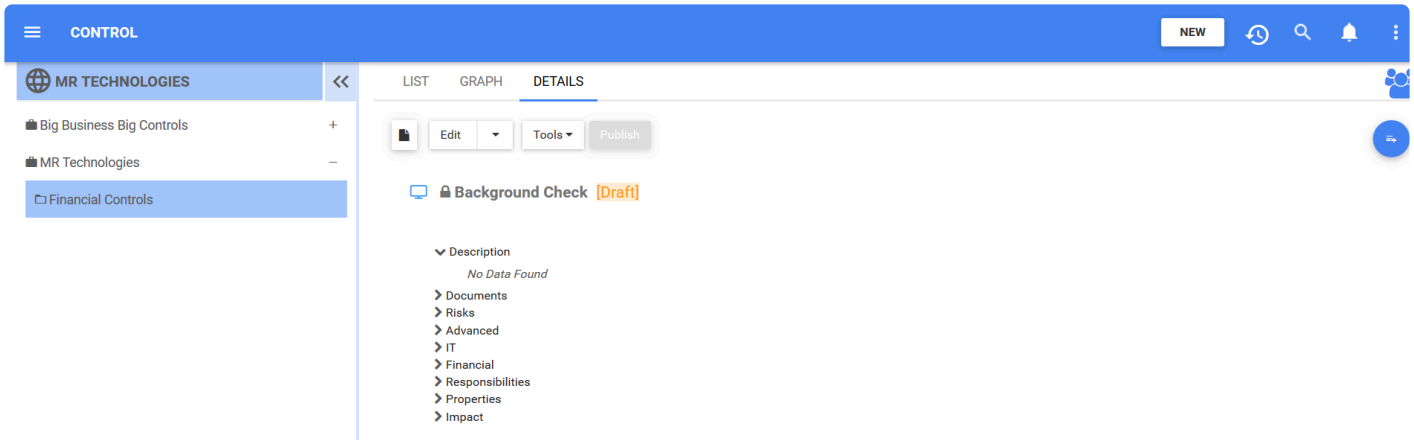


3. Click on the button 

to create the Control



4. The new Control “Acceptance of a fraudulent application” is now inside of the “Human Resources” folder. This Control is currently a draft. To learn how to publish Control objects, click here


CONTROL
NEW
MR TECHNOLOGIES
Big Business Big Controls
MR Technologies
Financial Controls
LIST
GRAPH
DETAILS
Edit
Tools
Publish
Background Check
[Draft]
Description
No Data Found
Documents
Risks
Advanced
IT
Financial
Responsibilities
Properties
Impact

12.7.2 Edit Control Objects

Web Modelers can edit the Details of Control objects. They need to navigate to the Edit button of the Control object to access the Edit Details window. The Edit Details window has two tabs, General, and Properties. Under each tab there are different sections where the Web Modeler can input detailed information about the Control object.

Web Modelers can choose the editing language in the Edit Details window.

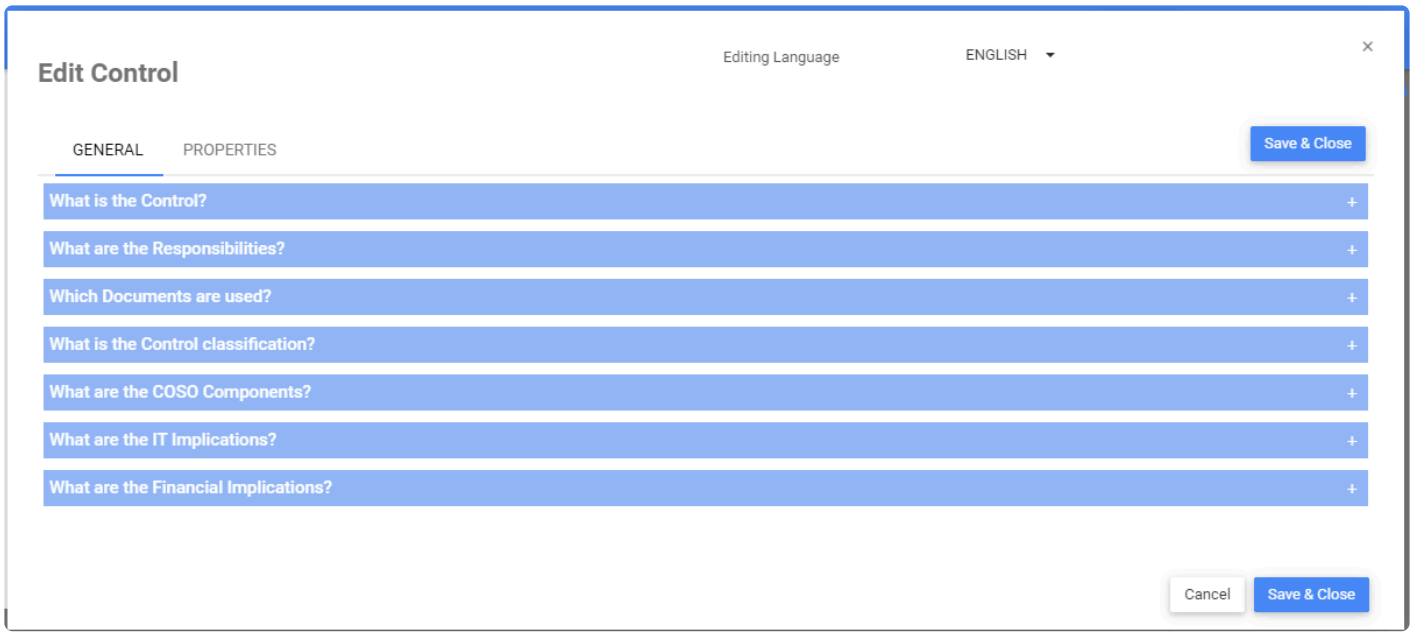
Only users with the Web Modeler Permission will be able to see the Edit Button on the toolbar; the displayed content needs to be set to Show Latest, and the editing tool is the Web.

This section will cover the following:

1. Edit Control General Details
2. Edit Control Properties Details

12.7.2.1 Edit Control General Details

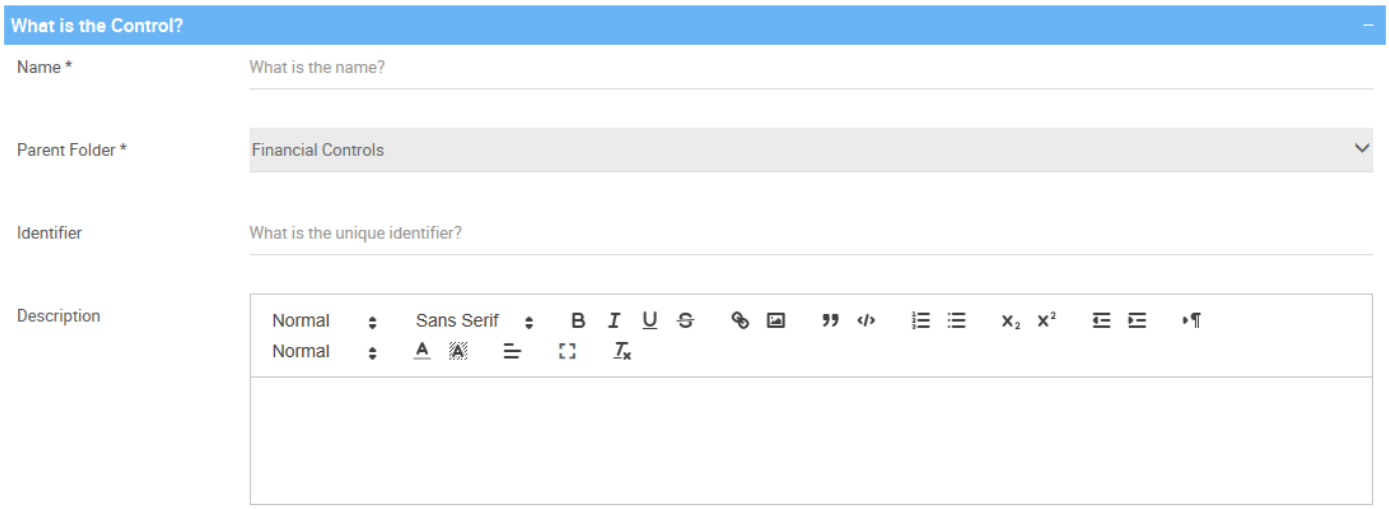
The General tab contains a section for the basic information about the Control, as well as the Responsibilities and Associations sections.



What is this Control?

This table below describes the fields of this section.

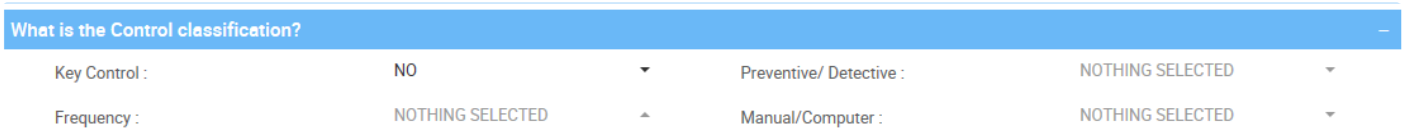
Field	Description
Name	The name of this Control. The name should summarize what is being controlled. A name is **mandatory** for all objects.
Parent Folder	The Folder under which this Control is nested.
Identifier	The Unique Identifier of this Control. This serves to uniquely identify the Control as per your company protocol.
Description	This field describes the Control in detail. The rich text format allows for text formatting, images, URLs, tables, etc.



What is the Control Classification?

This table below describes the fields of this section.

Field	Description	Options
Key Control	Displays if this is a Key Control	Yes, No
Frequency	How frequently the Control is done	N/A, Transaction, Daily, Weekly, Bi Monthly, Monthly, Quarterly, Yearly, When Required, Semi-Annually
Preventive/ Detective	Displays if the Control is Preventive or Detective	N/A, Preventive, Detective
Manual/ Computer	Displays if the Control is done Manually or by Computer	N/A, Manual, Computer

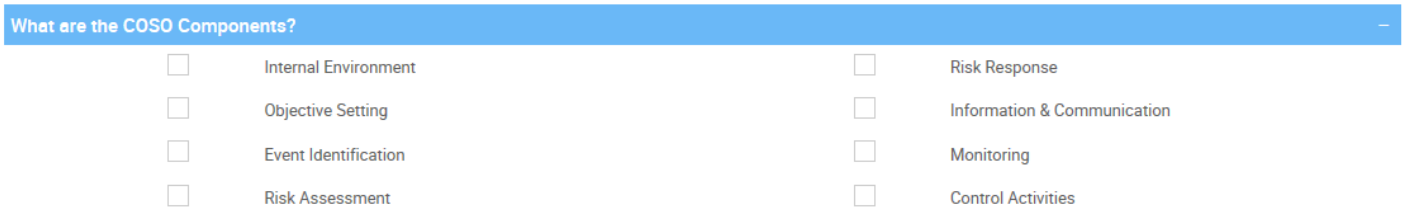


What are the COSO Components?

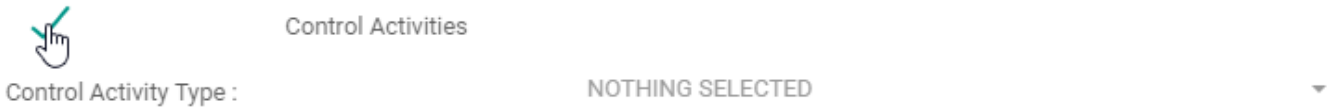
This table below lists the fields of this section.

Field
Internal Environment
Objective Setting
Event Identification

Risk Assessment
Risk Response
Information & Communication
Monitoring
Control Activities



When **Control Activities** is checked, another drop-down option is displayed to select a **type** of Control Activity.



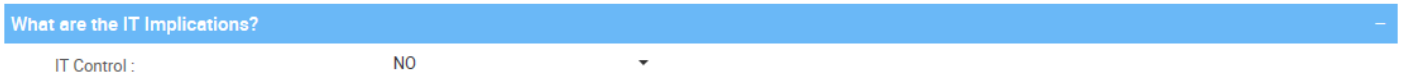
The drop-down includes the following options:

Control Activity Type
Authorization
Configuration/Account Mapping
Exception/Edit Report
Interface/Conversion Controls
Key Performance Indicators
Management Review
Reconciliation
Segregation of Duties
System Access

What are the IT Implications?

This table below describes the fields of this section.

Field	Description	Drop-down Options
IT Control	Is the control related to IT Security, Purchasing, Use, Distribution, etc.	Yes, No

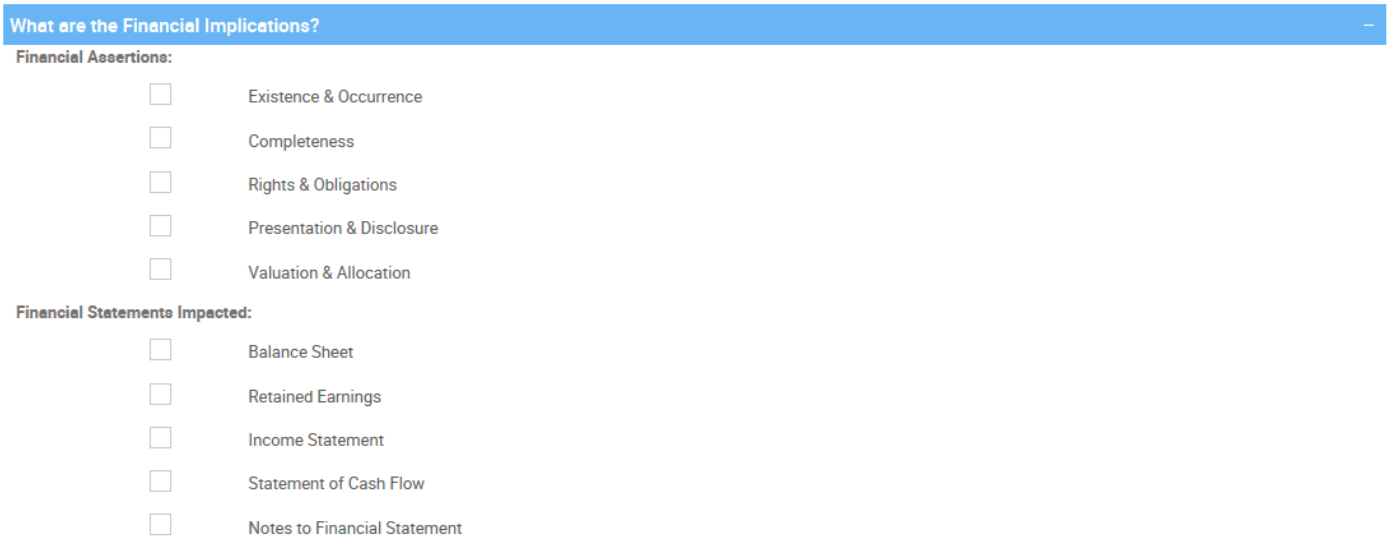


The following options are displayed when **IT Controls = YES**

Field	Description
Completeness	Controls that ensure all records were processed from initiation to completion.
Accuracy	Controls that ensure information remains accurate from initiation to completion.
Validity	Controls that ensure only valid data is input or processed.
Authorization	Controls that ensure only approved business users have access to the application system.

What are the Financial Implications?

There are two categories of **Financial Implications**: 1. **Financial Assertions** and 2. **Financial Statements Impacted**



1.Financial Assertions
Existence & Occurrence
Completeness

Rights & Obligations
Presentation & Disclosure
Valuation & Allocation

When **Valuation & Allocation** is checked, additional options are available:

Valuation & Allocation:

- [ ] Objective Setting
- [ ] Classification
- [ ] Timing or Cut-Off
- [ ] Posting & Summarization
- [ ] Detail Tie-In
- [ ] Realizable Value

Valuation & Allocation
Objective Setting
Classification
Timing or Cut-Off
Posting & Summarization
Detail Tie-In
Realizable Value

2.Financial Statements Impacted
Balance Sheet
Retained Earnings
Income Statement
Statement of Cash Flow
Notes to Financial Statement

Responsibilities and Associations

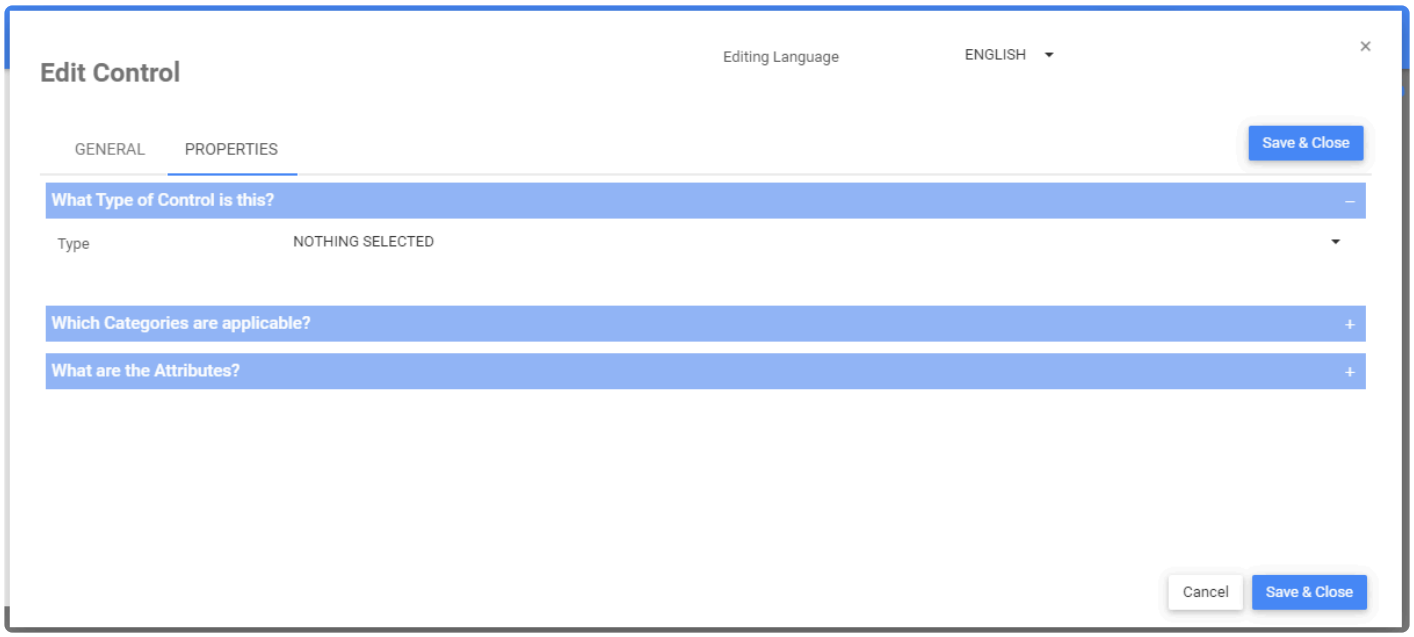
Since the Responsibilities and Associations sections are common to many EPC objects, the instructions

have been centralized in the Associations section of the user manual. You can find direct links to instructions for specific sections below.

Section	Instructions
What are the Responsibilities?	Assign Responsibilities
Which Documents are used?	Associate Documents
Which Business Rule are applicable?	Associate Rules
Which Controls are applicable?	Associate Controls

12.7.2.2 Edit Control Properties Details

The Properties tab contains sections for the type, the categories applicable and the attributes.



Since the Properties sections are common to many EPC objects, the instructions have been centralized in the Properties section of the user manual. You can find direct links to instructions for specific sections below.

Section	Instructions
What type of [Object] is this?	Object Type
Which Categories are applicable?	Object Categories
What are the Attributes?	Object Attributes

12.7.3 Delete Control Objects

Web Modelers can Delete Control Objects if they have Delete security permission.

To learn how delete objects, click here

12.7.4 Publish Control Objects

Once Web Modelers finished creating Control Objects, they can publish it and allow all users with rights to view the objects.

To learn how to publish objects, click here

12.7.5 Control Objects Approval Cycle

Web Modelers can set Approval Cycles on Control Objects.

To learn how to set Approval Cycles, click here

12.7.6 Control Objects Security

Web Modelers that are System Admins, Environment Admins, have Full Control Allow permission or have Read + Write + Delete Permission can set security permissions on Control Objects.

To learn how to set security on an object, click here.

12.7.7 Move Control Objects

Users can move Controls and Control Folders within the Control Module in the EPC.

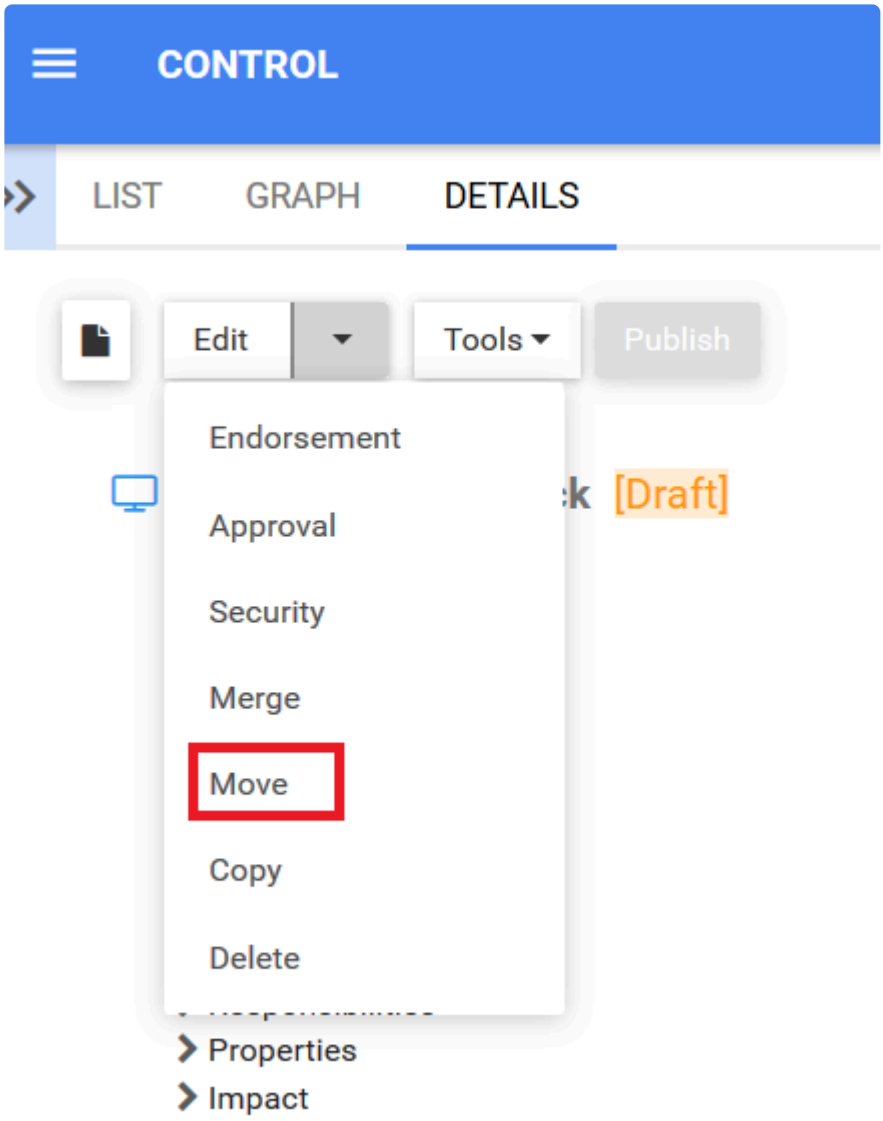
In Edit Mode, Control Folders can be moved from:

1. Folder to Folder
2. Folder to Set (Vice Versa)

Controls can be moved from

1. Folder to Folder

To move Control Objects, navigate to the item's details page. Within the "Edit" dropdown, select "Move".



You can find further detail on Moving Objects in the EPC here.

12.7.8 Merge Control Objects

Users can merge similar objects in the EPC, allowing you to combine multiple objects into one. This action will allow you to remove duplicate items while maintaining their content and relationships in the application.

This capability is typically used in some of the following scenarios:

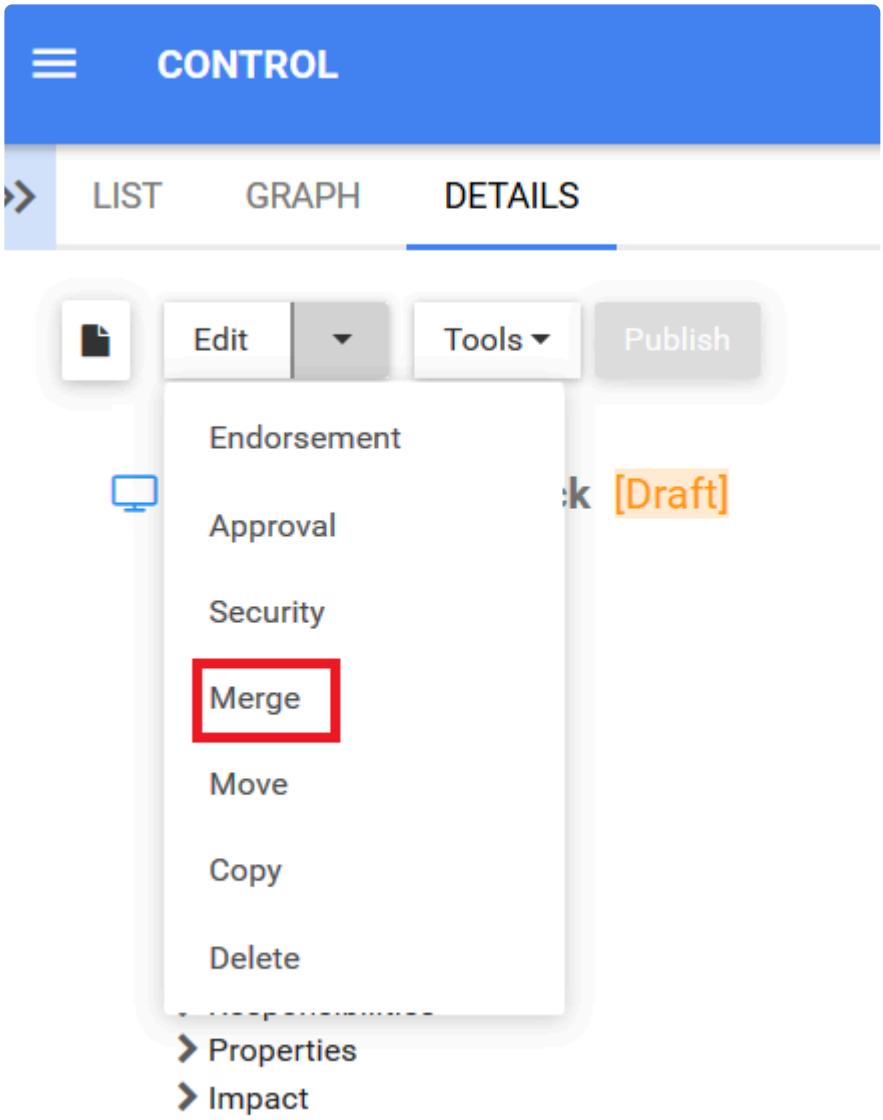
1. Remove duplicated items
2. Consolidate similar items
3. Adjust EPC content based on corporate restructurings and item re-definition

Within the Control Module users can

1. Merge Controls

> Please note that you can only Merge identical objects (i.e. KPIs can be merged with other KPIs, Objectives can be merged with other Objectives)

Users can find this feature on the details page of items. For further instructions on how to use our **Merge** feature, please see the work instructions here.


CONTROL
LIST
GRAPH
DETAILS
Edit
Tools
Publish
Endorsement
Approval
Security
Merge
Move
Copy
Delete
[Draft]
Properties
Impact

12.7.9 Generate Control Books

Your EPC now features object book generation, allowing you to leverage your EPC to dynamically create object specific reports and documents. After your editors have created and uploaded document templates you can now uses these templates for the following modules:

These reports can be generated at:

a) The object level – allowing you to create reports about a specific object

b) The folder, process or org unit level – allowing you to create reports about objects INCLUDING there child objects

c) The Set level – allowing you to create large, summary documents including their child objects

For more information on how to generate object books, click here

12.7.10 Control Object Endorsement Cycle

Web Modelers can set Endorsement Cycles on Control Objects.
To learn how to set Endorsement Cycles, click here

12.8 Rule Edit

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.

Users given the permission to be Web Modelers, can create and edit Rule objects directly on the WebApp.

The Rule Edit section will cover the following:

1. Create Rule Objects
2. Edit Rule Objects
3. Delete Rule Objects
4. Publish Rule Objects
5. Rule Objects Approval Cycle
6. Rule Objects Security

12.8.1 Create Rule Objects

Web Modelers can create new Rule Objects on the Web App. These objects can be Rule Sets, Rule Folders, and Rules. Web Modelers can create new Rule objects by clicking on the button NEW or directly through the Details Page of a Rule Set or Rule Folder.

The Create Rule Objects section will cover the following:

1. Create a Rule Set
2. Create a Rule Folder
3. Create a Rule

12.8.1.1 Create a Rule Set

Rule Sets link and store all Rules within the organization's database. Rule Sets enable Web Modelers to organize an organization's rules in a hierarchical structure, and have a centralized repository.

Web Modelers can create new Rule Sets on the WebApp.

To Create a New RuleSet, please follow the Create Sets instructions.

12.8.1.2 Create a Rule Folder

A Rule Folder contains Rule objects. Web Modelers arrange Rule Folders in a manner that is the most appropriate to the organization's structure and use them as organization tools.

Rule Folders are found within a Set or Folder (as a sub-folder) and are arranged in a hierarchical structure to simplify navigation and organization. It is recommended to organize Rule folders by having Folders for each Organization Unit or Folders for each Value Stream/Process.

Web Modelers can create new Rule Folders on the WebApp.

To create Rule Folders, please follow Create Folders instructions.

12.8.1.3 Create a Rule

A Rule is an EPC object that model the structural facts, terms, invariant and constraints by which a company operates. 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.

Web Modelers can create Rules on the WebApp and organize them within Rule Folders.

For instructions on how to create a new Rule, see the Create Objects section.

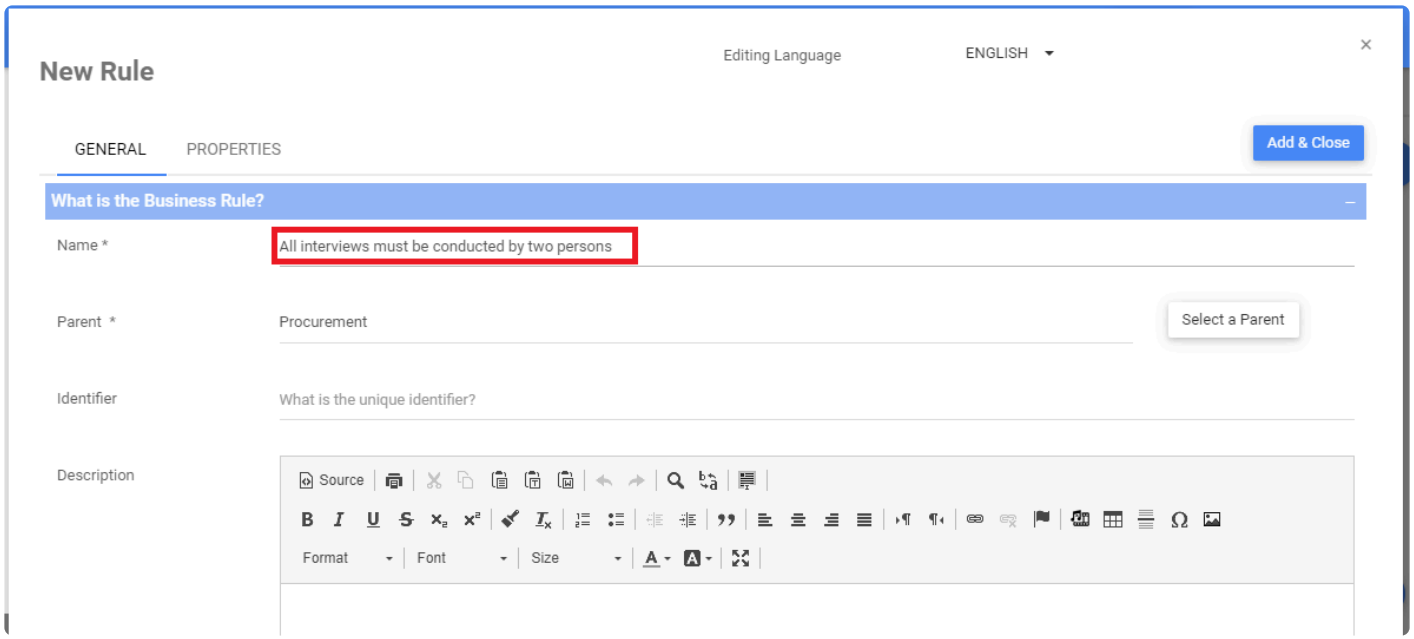
Filling out a New Rule form

> Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

1. Type the name of the Rule on the “What is the name?” field

> It is **mandatory** for Web Modelers to input a name for the Rule

For this example, the name of the Rule is “All interviews must be conducted by two persons”

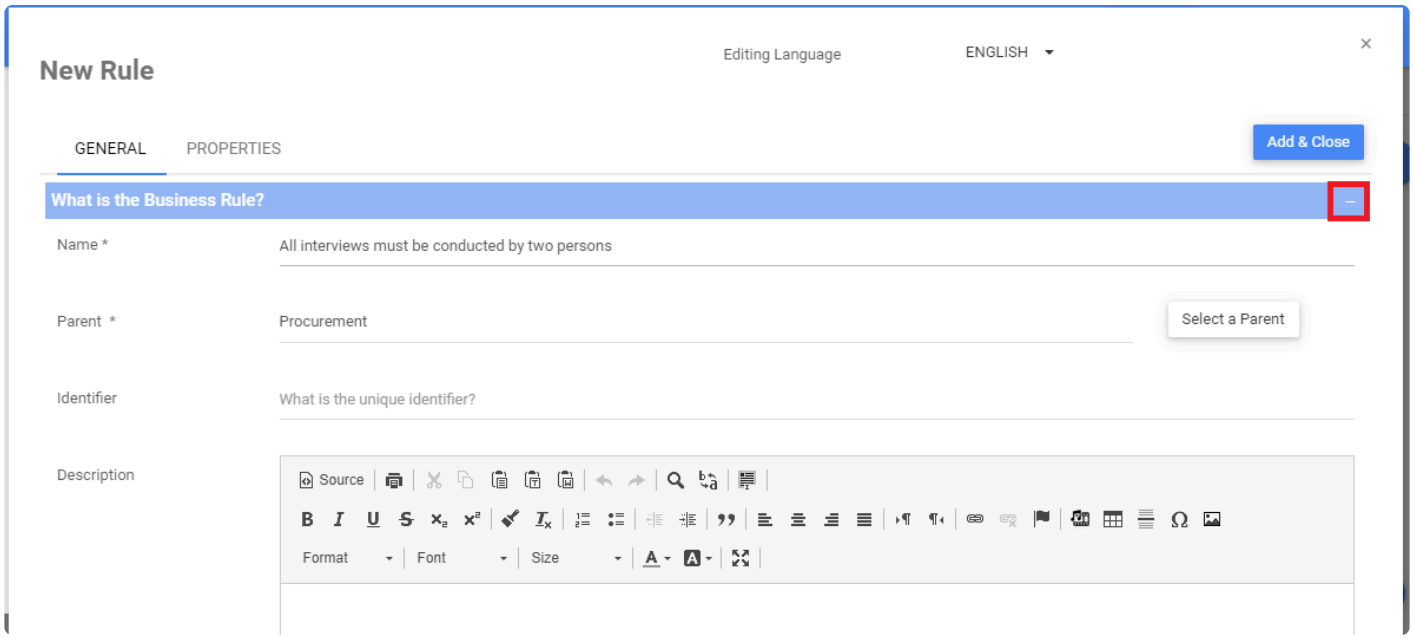


> The EPC automatically assigns the Rule Folder as the Parent, which is the folder or sub-folder you selected. The Parent field is blocked and cannot be edited.

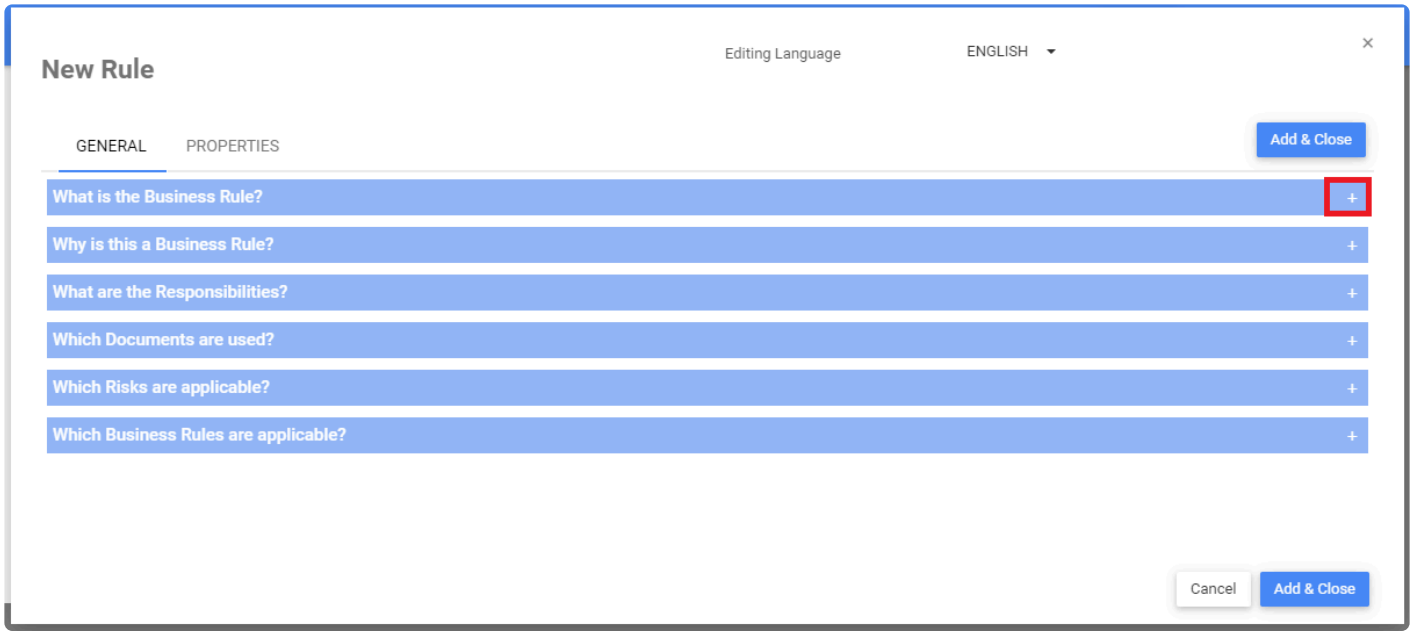
2. Use the + and − icons to expand and hide the different sections within each tab of the New Rule Window. Input the right information about the Rule in each section.

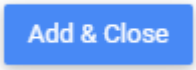
> The new Rule window has two tabs, General and Properties. Under each tab there are different sections where the Web Modeler can input detailed information about the Rule. To learn more about about each section and how to input information, click here

i) To hide sections, click on the − icon:

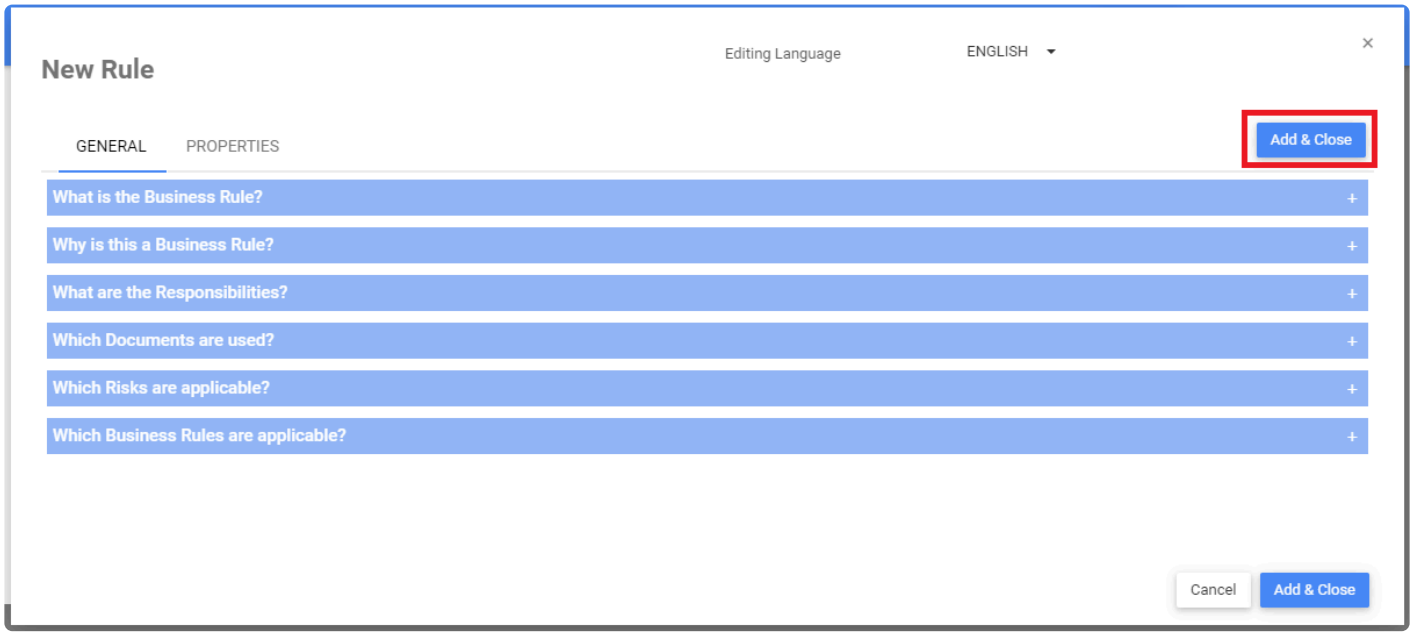


ii) To expand sections, click on the + icon:

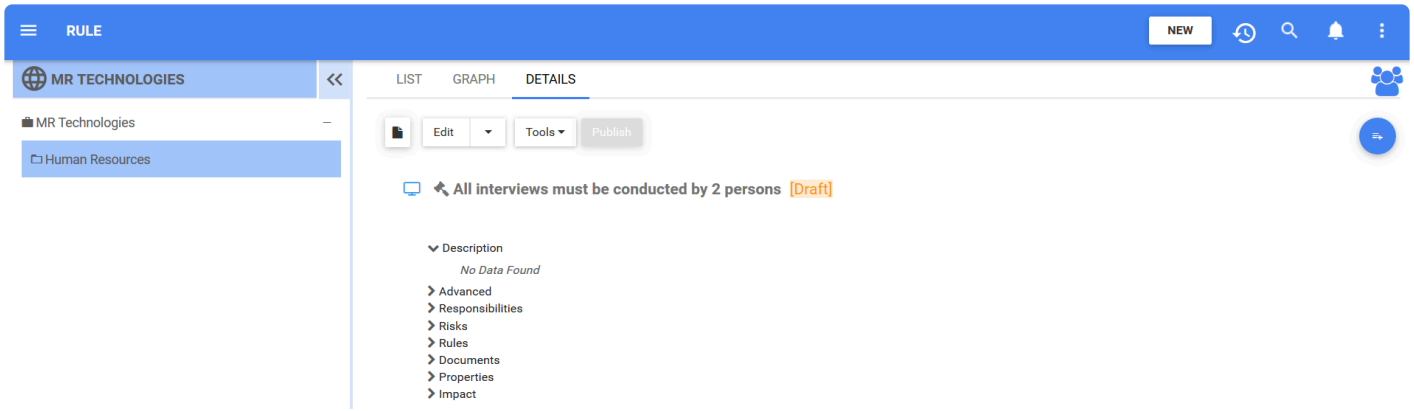


3. Click on the button 

to create the Rule



4. The new Rule “All interviews must be conducted by two persons” is now inside of the “Human Resources” folder. This Rule is currently a draft. To learn how to publish Rule objects, click here


RULE
NEW
MR TECHNOLOGIES
MR Technologies
Human Resources
LIST
GRAPH
DETAILS
Edit
Tools
Publish
All interviews must be conducted by 2 persons [Draft]
Description
No Data Found
Advanced
Responsibilities
Risks
Rules
Documents
Properties
Impact

12.8.2 Edit Rule Objects

Web Modelers can edit the Details of Rule objects. They need to navigate to the Edit button of the Rule object to access the Edit Details window. The Edit Details window has two tabs, General, and Properties. Under each tab there are different sections where the Web Modeler can input detailed information about the Rule object.

Web Modelers can choose the editing language in the Edit Details window.

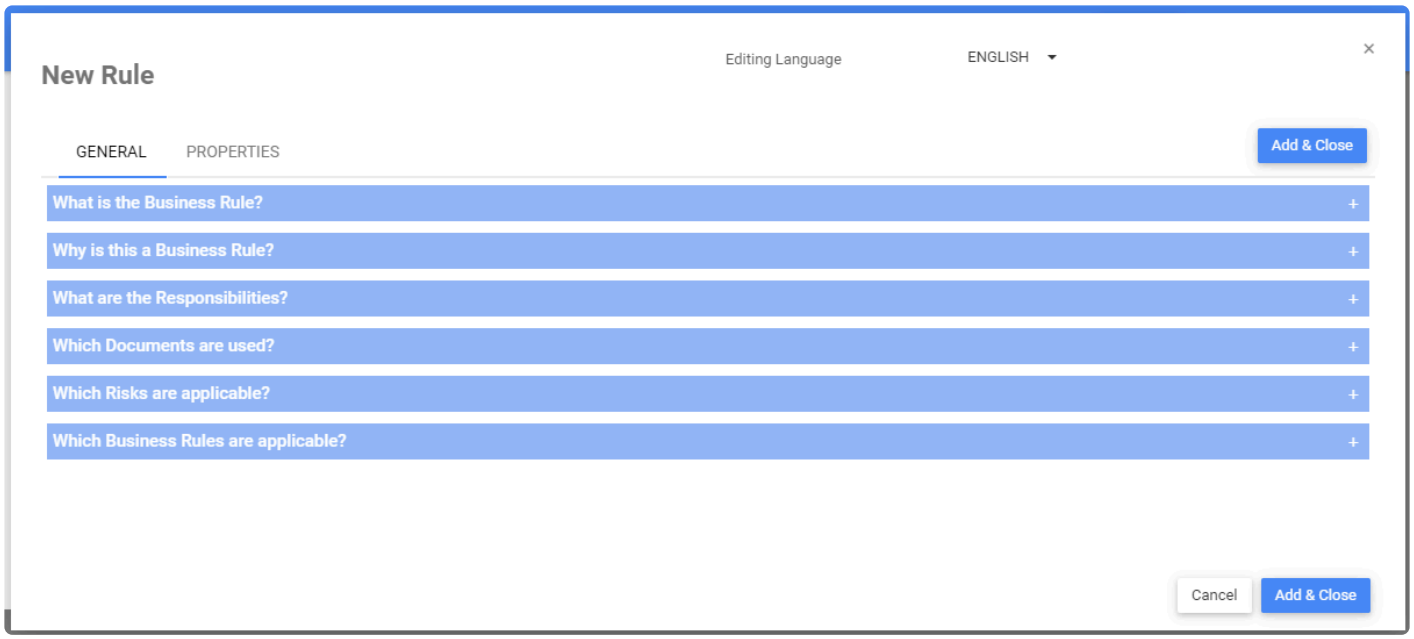
Only users with the Web Modeler Permission will be able to see the Edit Button on the toolbar; the displayed content needs to be set to Show Latest, and the editing tool is the Web.

This section will cover the following:

1. Edit Rule Unit General Details
2. Edit Rule Properties Details

12.8.2.1 Edit Rule General Details

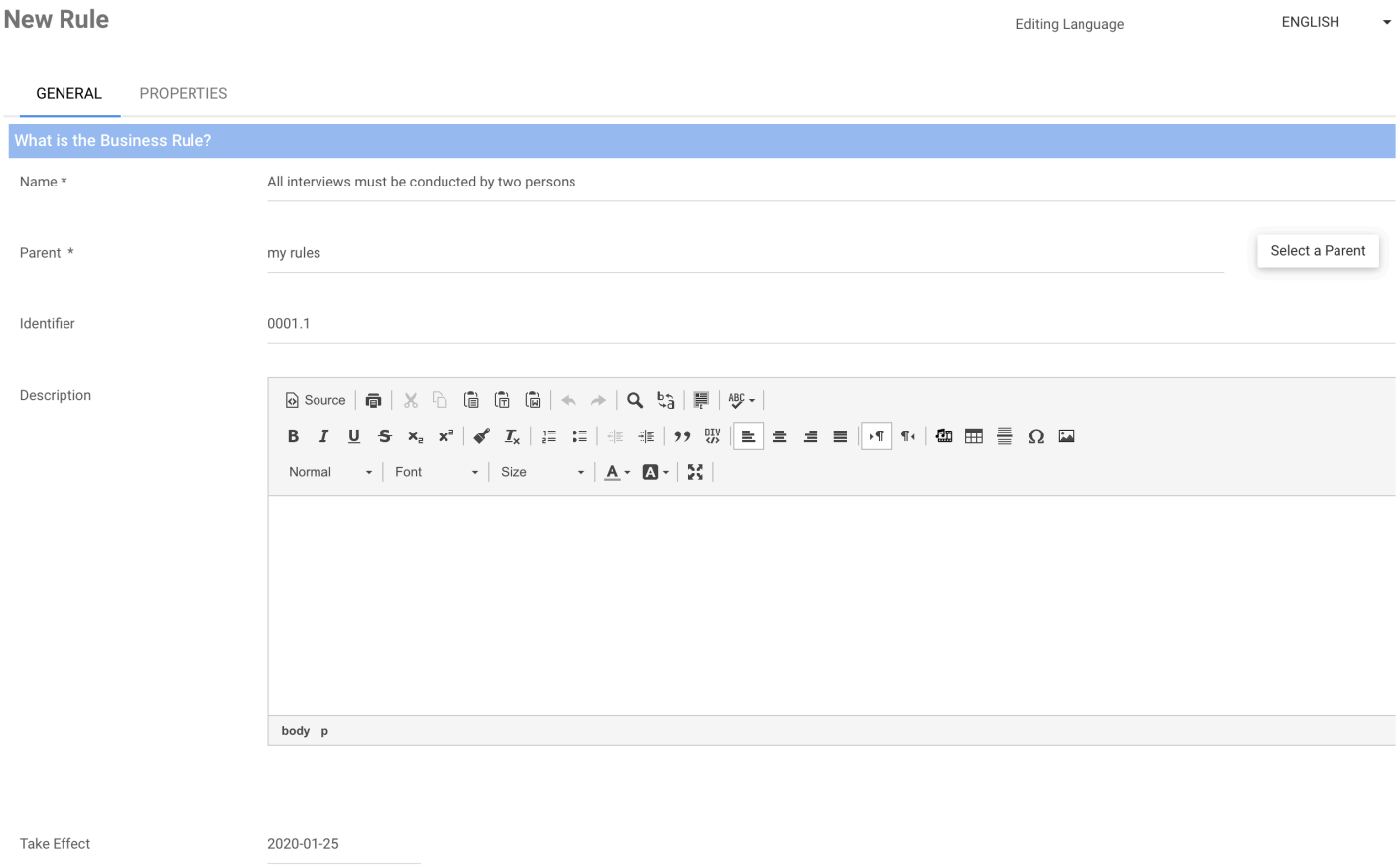
The General tab contains a section for the basic information about the Rule, as well as the Responsibilities and Associations sections.



What is the Business Rule?

This table below describes the fields of this section.

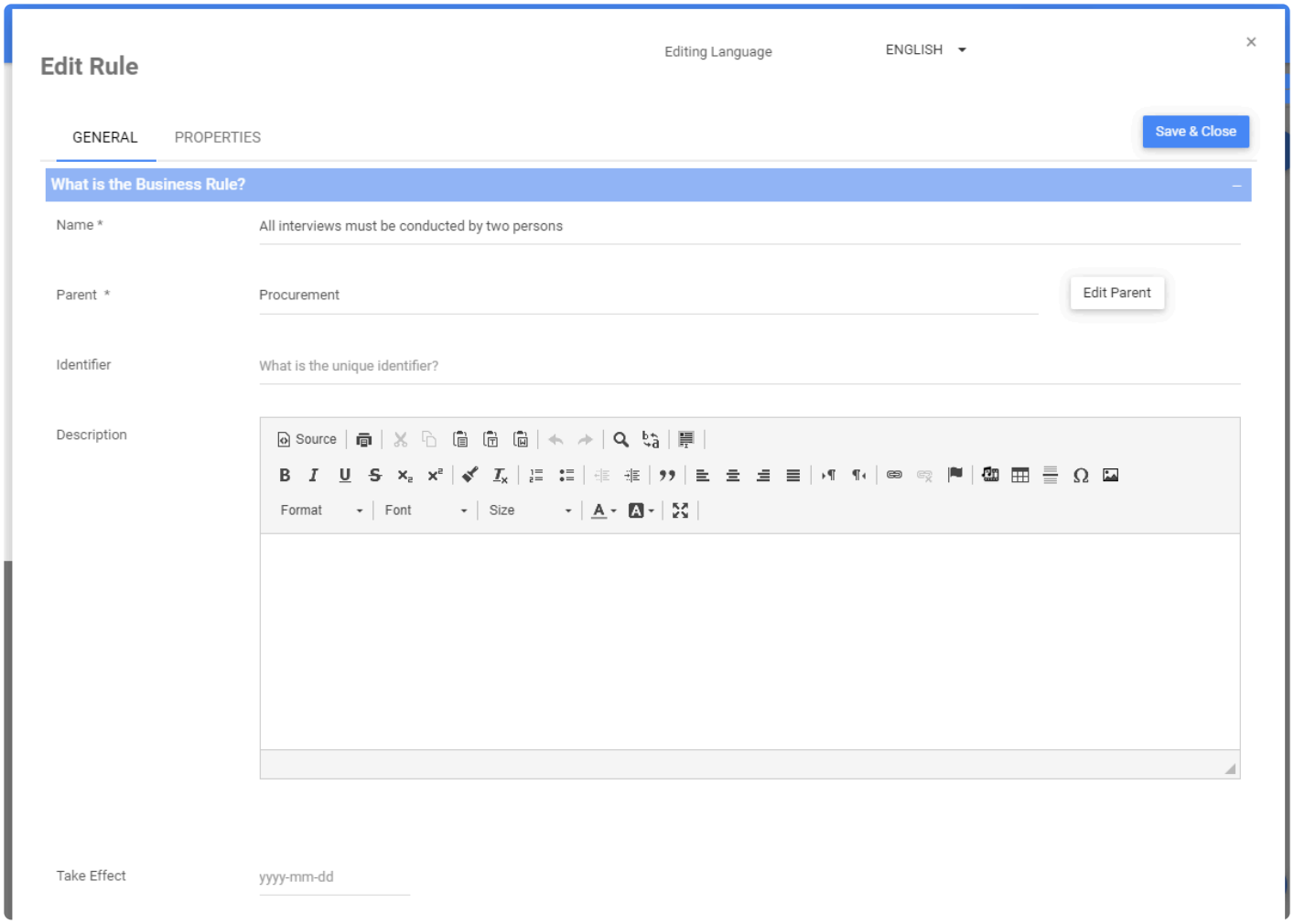
Field	Description
Name	The name of this Business Rule. The name should summarize what the Business Rule is. A name is **mandatory** for all objects.
Parent Folder	The Folder under which this Business Rule is nested.
Identifier	The Unique Identifier of this Business Rule. This serves to uniquely identify the Business Rule as per your company protocol.
Description	This field describes the Business Rule in detail. The rich text format allows for text formatting, images, URLs, tables, etc.
Take Effect	This date indicates when the rule will come into force



Why is this a Business Rule?

This table below describes the fields of this section.

Field	Description
What is an example of this Rule?	Field to input an example of the rule
What is the history of this Rule?	Field to input the history of the rule
What is the source of this Rule?	Field to input the source of the rule



Responsibilities and Associations

Since the Responsibilities and Associations sections are common to many EPC objects, the instructions have been centralized in the Associations section of the user manual. You can find direct links to instructions for specific sections below.

Section	Instructions
What are the Responsibilities?	Assign Responsibilities
Which Documents are used?	Associate Documents
Which Risks are applicable?	Associate Risks
Which Business Rules are applicable?	Associate Business Rules

12.8.2.2 Edit Rule Properties Details

The Properties tab contains sections for the type, the categories applicable and the attributes.

Since the Properties sections are common to many EPC objects, the instructions have been centralized in the Properties section of the user manual. You can find direct links to instructions for specific sections below.

Section	Instructions
What type of [Object] is this?	Object Type
Which Categories are applicable?	Object Categories
What are the Attributes?	Object Attributes

12.8.3 Delete Rule Objects

Web Modelers can Delete Rule Objects if they have Delete security permission.

To learn how delete objects, click here

12.8.4 Publish Rule Objects

Once Web Modelers finished creating Rule Objects, they can publish it and allow all users with rights to view the objects.

To learn how to publish objects, click here

12.8.5 Rule Objects Approval Cycle

Web Modelers can set Approval Cycles on Rule Objects.

To learn how to set Approval Cycles, click here

12.8.6 Rule Objects Security

Web Modelers that are System Admins, Environment Admins, have Full Control Allow permission or have Read + Write + Delete Permission can set security permissions on Rule Objects.

To learn how to set security on an object, click here.

12.8.7 Move Rule Objects

Users can move Rules and Rule Folders within the Rule Module in the EPC.

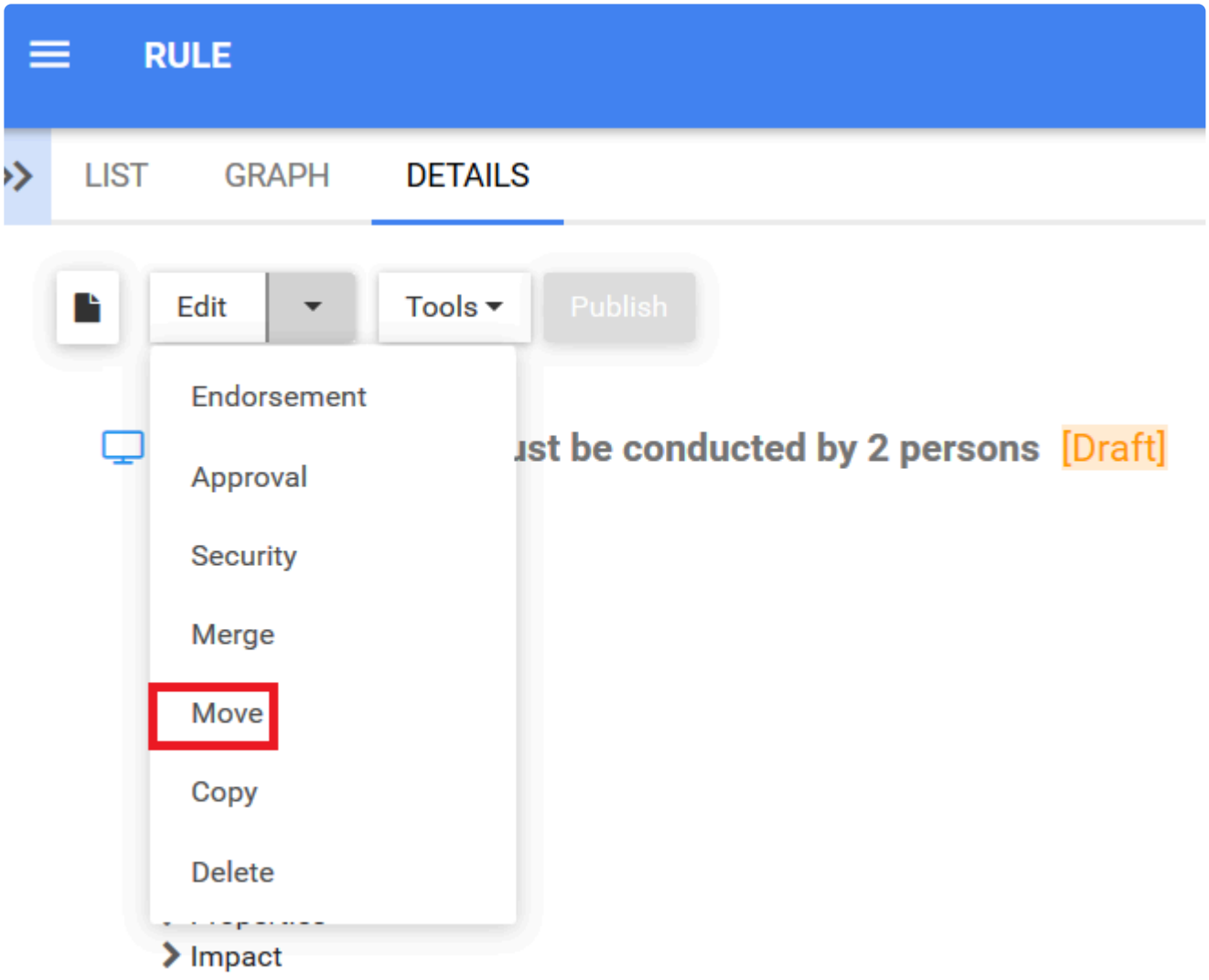
In Edit Mode, Rule Folders can be moved from:

1. Folder to Folder
2. Folder to Set (Vice Versa)

Rules can be moved from

1. Folder to Folder

To move Rule Objects, navigate to the item's details page. Within the "Edit" dropdown, select "Move".



You can find further detail on Moving Objects in the EPC here.

12.8.8 Merge Rule Objects

Users can merge similar objects in the EPC, allowing you to combine multiple objects into one. This action will allow you to remove duplicate items while maintaining their content and relationships in the application.

This capability is typically used in some of the following scenarios:

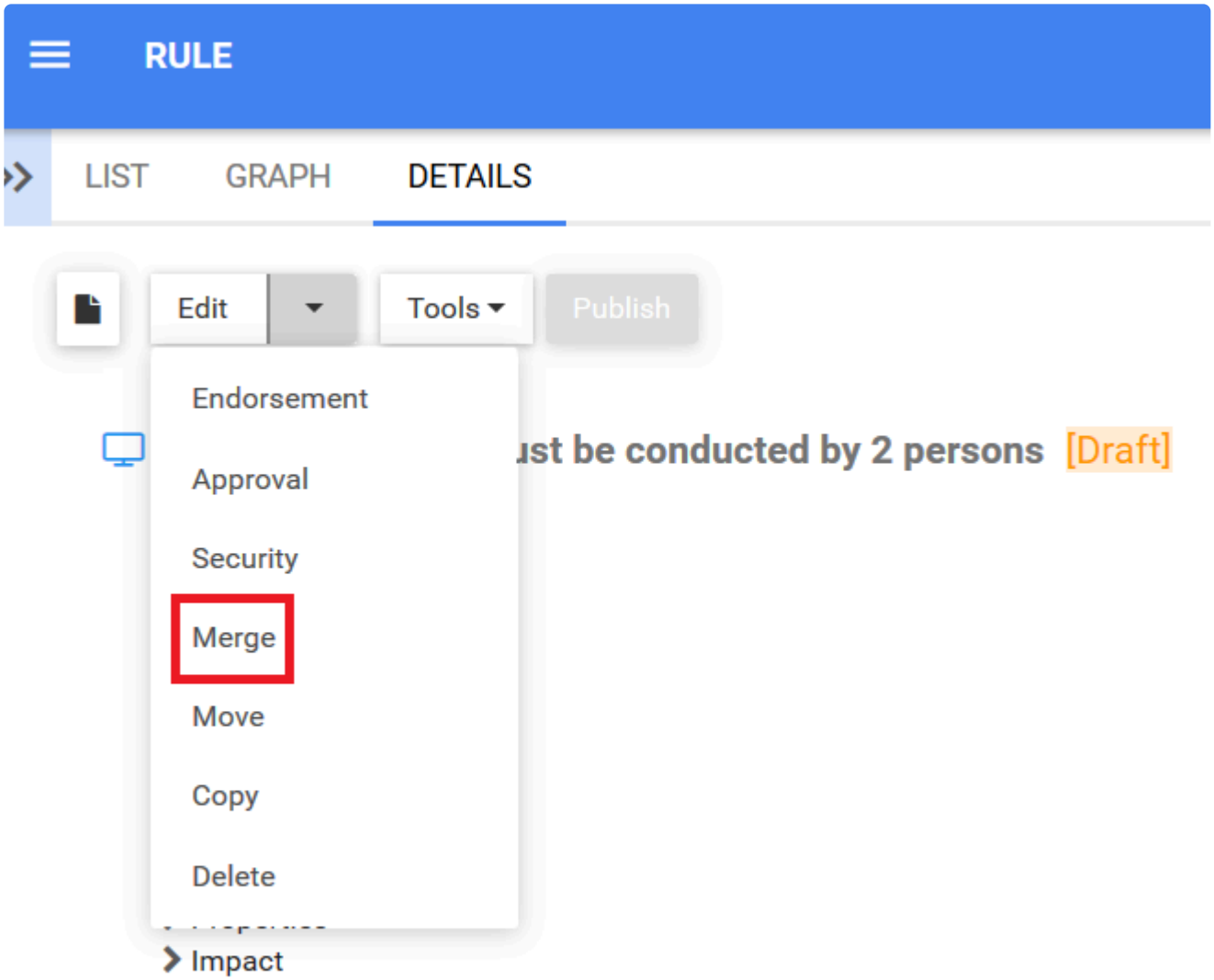
1. Remove duplicated items
2. Consolidate similar items
3. Adjust EPC content based on corporate restructurings and item re-definition

Within the Rules Module users can

1. Merge Rules

> Please note that you can only Merge identical objects (i.e. KPIs can be merged with other KPIs, Objectives can be merged with other Objectives)

Users can find this feature on the details page of items. For further instructions on how to use our **Merge** feature, please see the work instructions here.


RULE
LIST
GRAPH
DETAILS
Edit
Tools
Publish
Endorsement
Approval
Security
Merge
Move
Copy
Delete
ust be conducted by 2 persons
[Draft]
Impact

12.8.9 Generate Rule Books

Your EPC now features object book generation, allowing you to leverage your EPC to dynamically create object specific reports and documents. After your editors have created and uploaded [document templates](#) you can now uses these templates for the following modules:

These reports can be generated at:

a) The object level – allowing you to create reports about a specific object

b) The folder, process or org unit level – allowing you to create reports about objects INCLUDING there child objects

c) The Set level – allowing you to create large, summary documents including their child objects

For more information on how to generate object books, click [here](#)

12.8.10 Rule Objects Endorsement Cycle

Web Modelers can set Endorsement Cycles on Rule Objects.
To learn how to set Endorsement Cycles, click here

12.8.11 Assign To

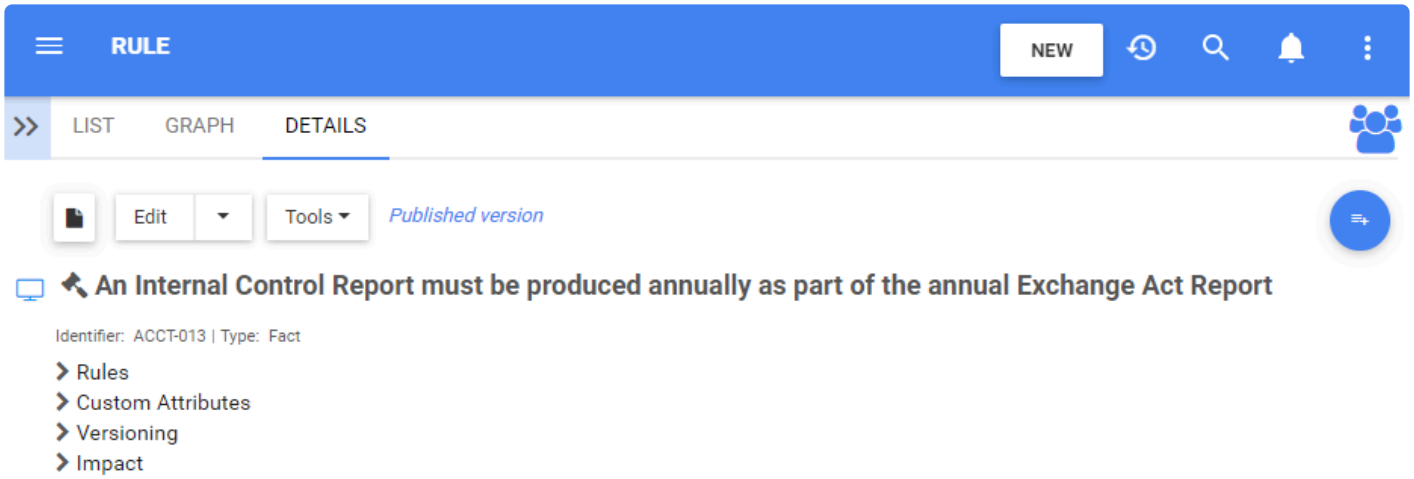
Web Modelers can assign a rule objects on the Web App to other EPC objects directly from a rules' detail page. These are the following objects a rule can be assigned to: Process, Flow Object, Controls, Rules, Asset, Attribute & Entity.

Web Modelers can assign objects to a rule by clicking on the button "Assign To" from the Edit dropdown menu directly through the details page of a Rule.

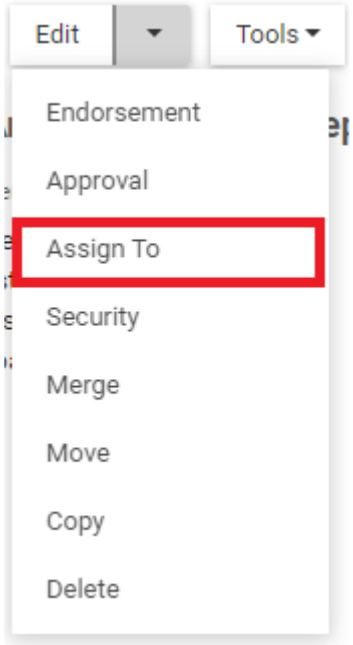
When you select an object, then it will automatically be assigned to that object

When a rule is assigned to an object, the rule will appear on the objects impact list and impact graph

1. Navigate to the details page of a rule



2. Click on the arrow next to the "Edit" button and select "Assign To"

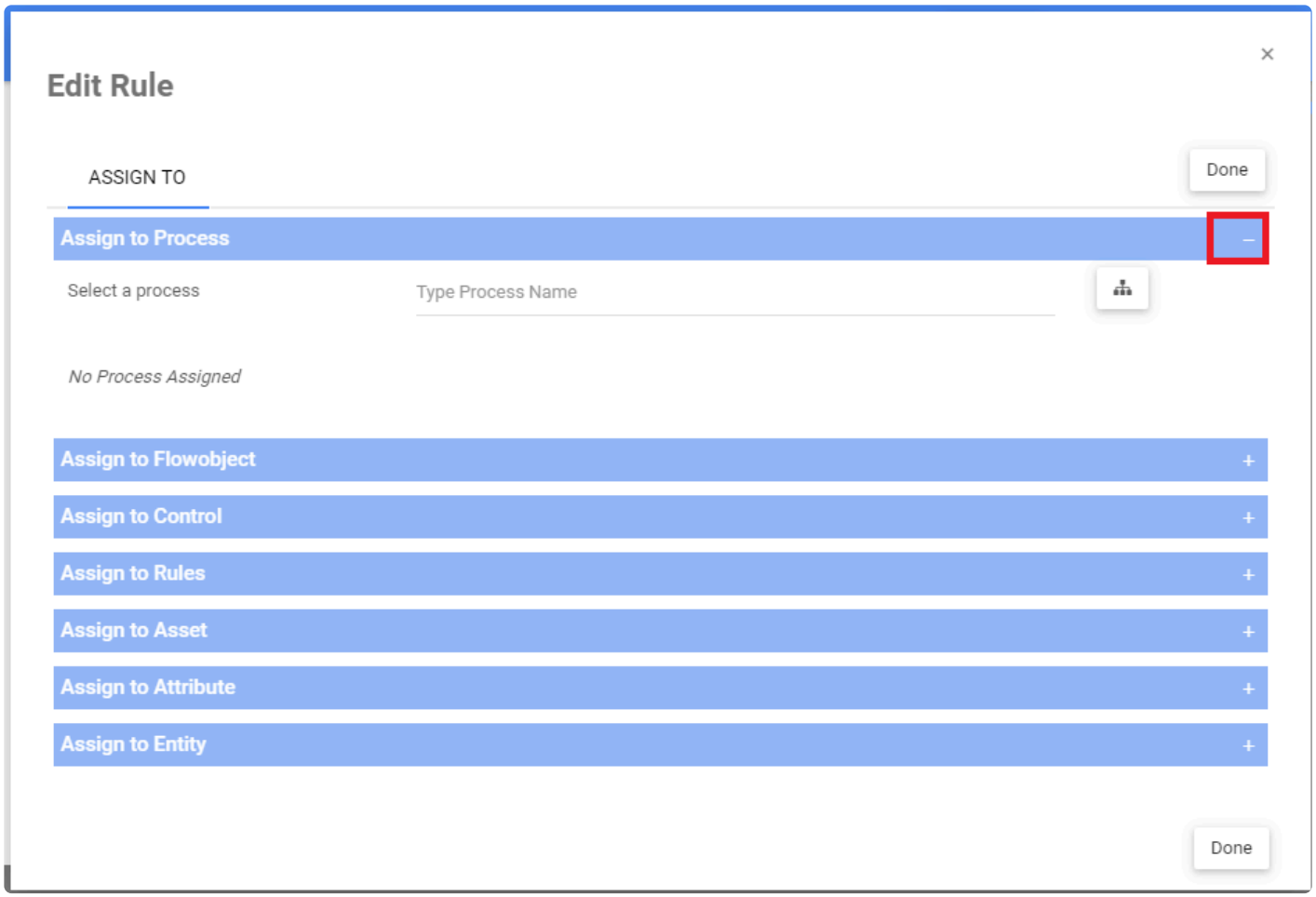


3. A window will be generated where you can select the objects you want your rule assigned to

4. Use the + and − icons to expand and hide the different sections within the each tab of the Assigned

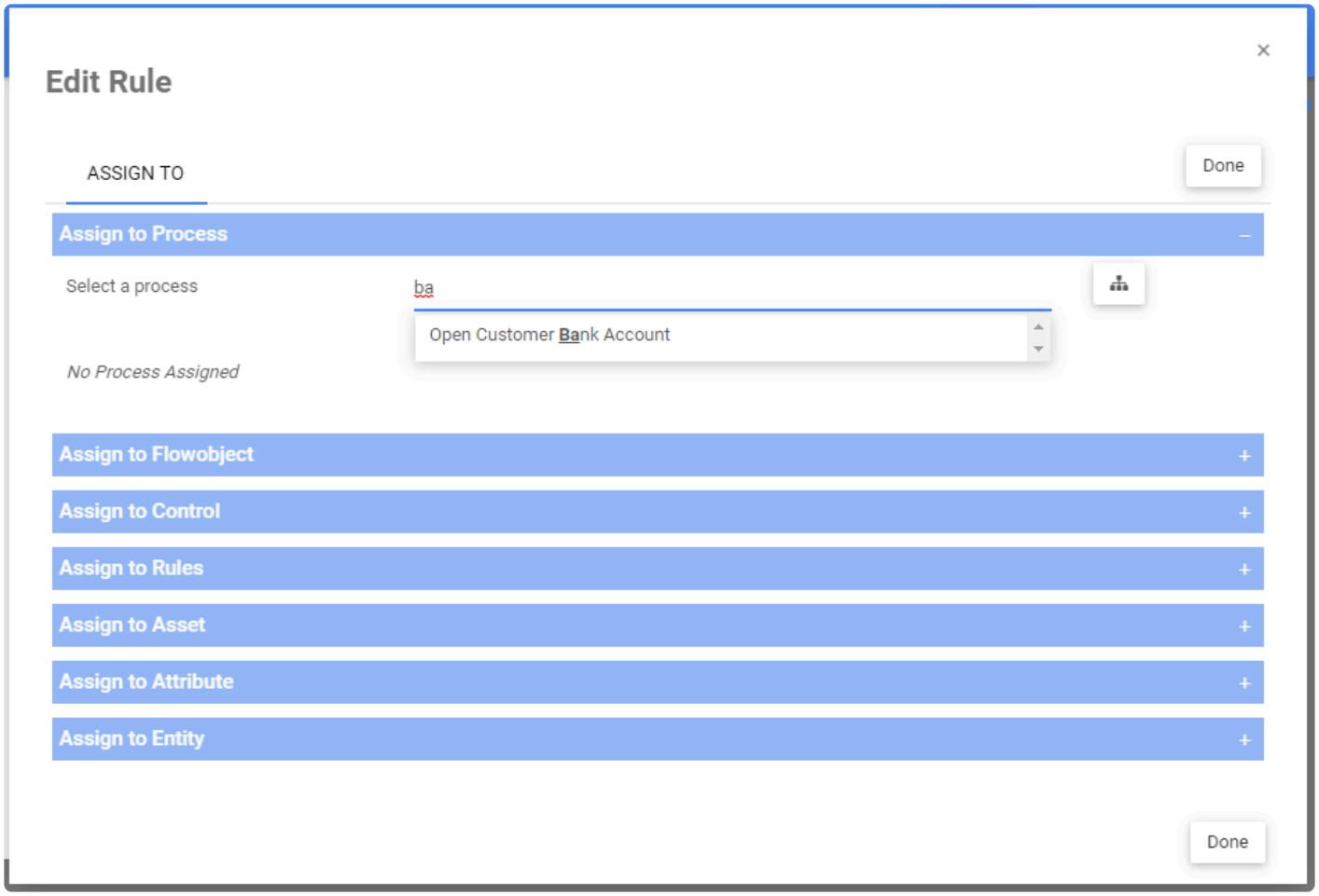
Window.

i) To hide sections, click on the icon:

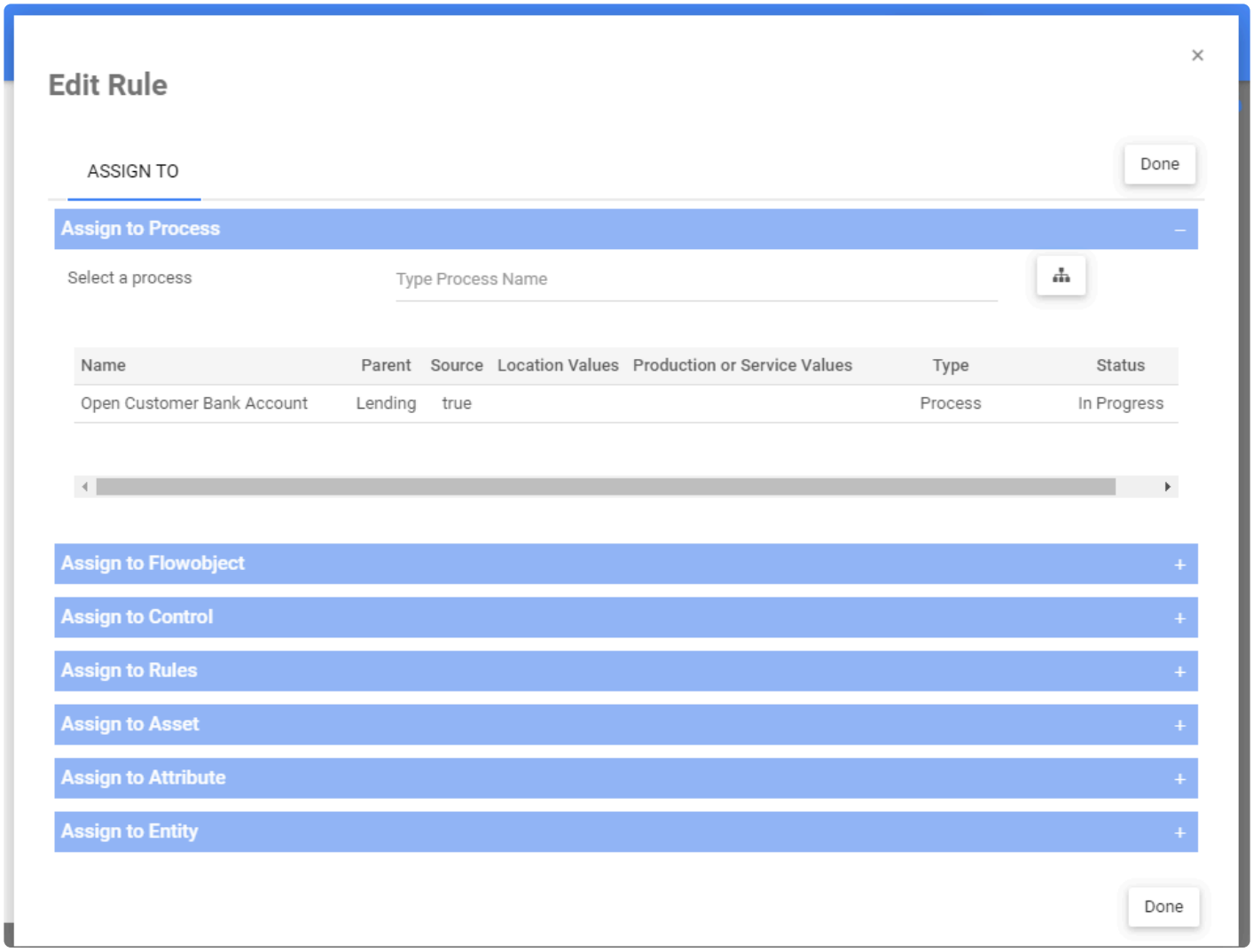


i) To expand sections, click on the icon:

5. To assign a object (e.g., a process), expand the section & search for the object by either typing or by using the tree selector



6. After you assigned, the object name, parent name, type & status will appear under a table.


Edit Rule
ASSIGN TO
Done
Assign to Process
Select a process
Type Process Name
Name
Parent
Source
Location Values
Production or Service Values
Type
Status
Open Customer Bank Account
Lending
true
Process
In Progress
Assign to Flowobject
Assign to Control
Assign to Rules
Assign to Asset
Assign to Attribute
Assign to Entity
Done

12.9 Master Data Edit

The Master Data Module in EPC manages your company's data by defining and sorting entities and attributes. Entities allow the user to define the specific object types that are passed along through your processes. Attributes contain the individual pieces of data that make up the object types. Master Data standardizes information, it enables the integration of data throughout an organization's business processes.

Users given the permission to be Web Modelers, can create and edit Master Data objects directly on the WebApp.

The Master Data Edit section will cover the following:

1. Create Master Data Objects
2. Edit Master Data Objects
3. Delete Master Data Objects
4. Publish Master Data Objects
5. Master Data Approval Cycle
6. Master Data Security

12.9.1 Create Master Data Objects

Web Modelers can create new Master Data objects on the Web App. These objects can be Master Data Sets, Master Data Folders, Entities, and Attributes. Web Modelers can create new Master Data objects by clicking on the button NEW or directly through the Details Page of a Master Data Set or Master Data Folder.

The Create Master Data Objects section will cover the following:

1. Create a Master Data Set
2. Create a Master Data Folder
3. Create an Entity
4. Create an Attribute

12.9.1.1 Create a Master Data Set

Master Data Sets are the top level of your Master Data hierarchy. Master Data Sets contain all Master Data folders, which in turn contain the appropriate Entities and Attributes. Organizations can have a centralized Master Data repository.

Web Modelers can create new Master Data Sets on the WebApp.

To Create a New Master Data Set, please follow the Create Sets instructions.

12.9.1.2 Create a Master Data Folder

A Master Data Folder contains all Entities and Attributes. Web Modelers arrange Master Data Folders in a manner that is the most appropriate to the organization's structure and use them as organization tools.

Master Data Folders are found within a Set or Folder (as a sub-folder) and are arranged in a hierarchical structure to simplify navigation and organization.

Web Modelers can create new Master Data Folders on the WebApp.

To create Master Data Folders, please follow Create Folders instructions.

12.9.1.3 Create an Entity

Entities are Master Data objects. Entities allow the user to define the specific object types that are passed along through an organization's processes, allowing the user to fully integrate and reuse the objects.

You can find Entities within the Master Data Folders. Attributes are contained in an Entity; Entities are qualified by their attributes.

For instructions on how to create a new Entity, see the Create Objects section.

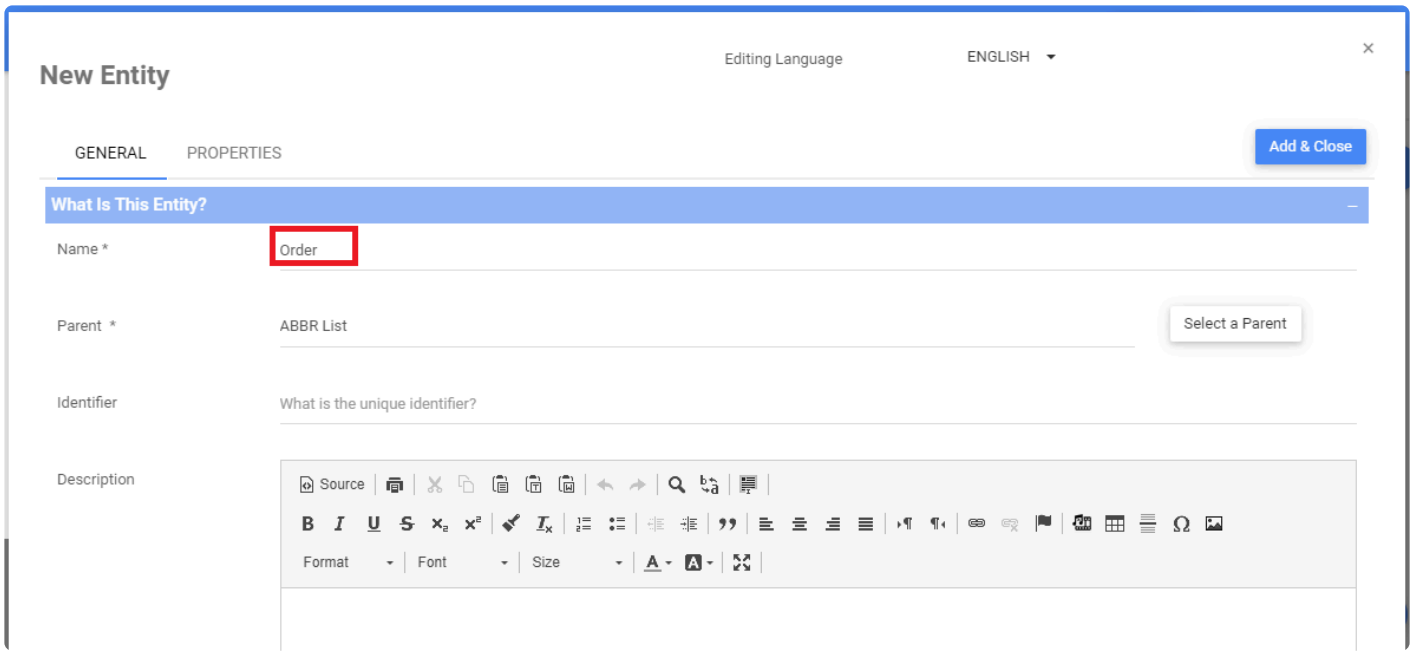
Filling out a New Entity form

Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

1. Type the name of the Entity on the "What is the name?" field

It is **mandatory** for Web Modelers to input a name for the Entity

For this example, the name of the Entity is "Order"



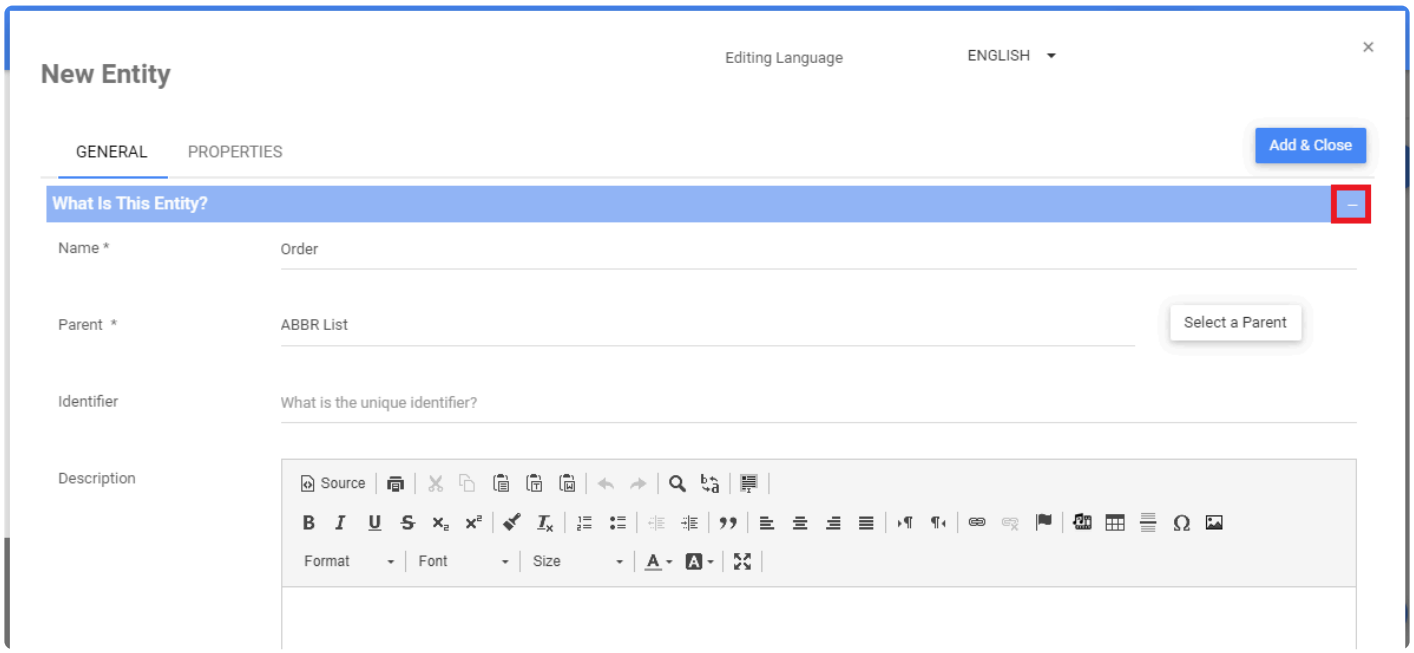
The EPC automatically assigns the Master Data Folder **you selected** as the Parent. If you

wish to assign a different parent, click on the Select a Parent box.

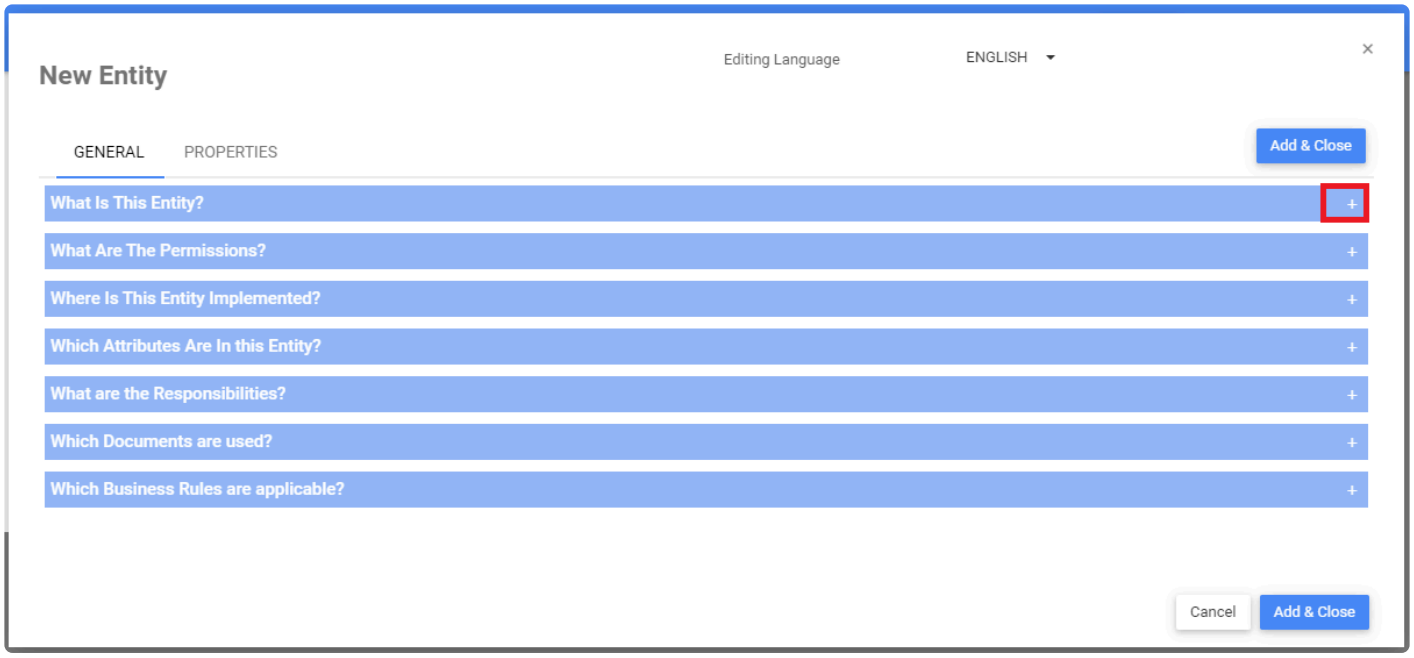
2. Use the + and − icons to expand and hide the different sections within each tab of the New Entity Window. Input the right information about the Entity in each section.

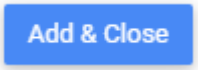
The New Entity window has two tabs, General} and Properties. Under each tab there are different sections where the Web Modeler can input detailed information about the Entity. To learn more about about each section and how to input information, click here

i) To hide sections, click on the − icon:

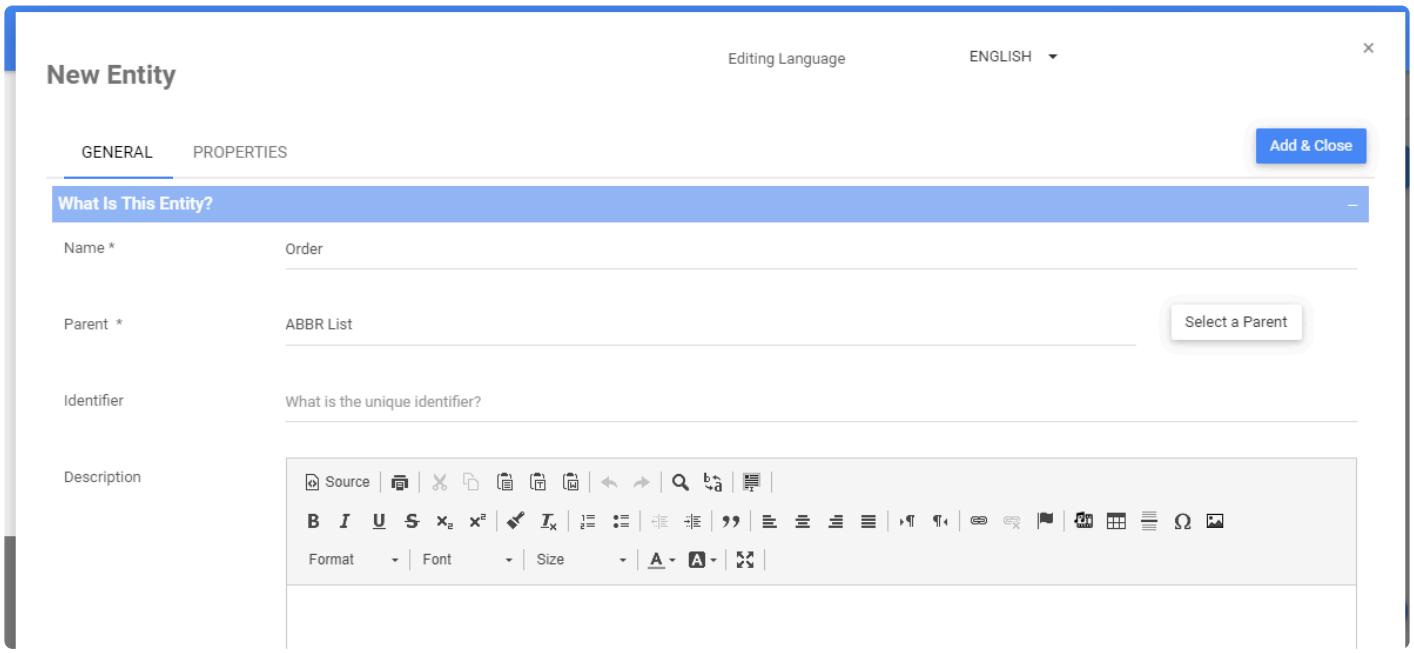


ii) To expand sections, click on the + icon:

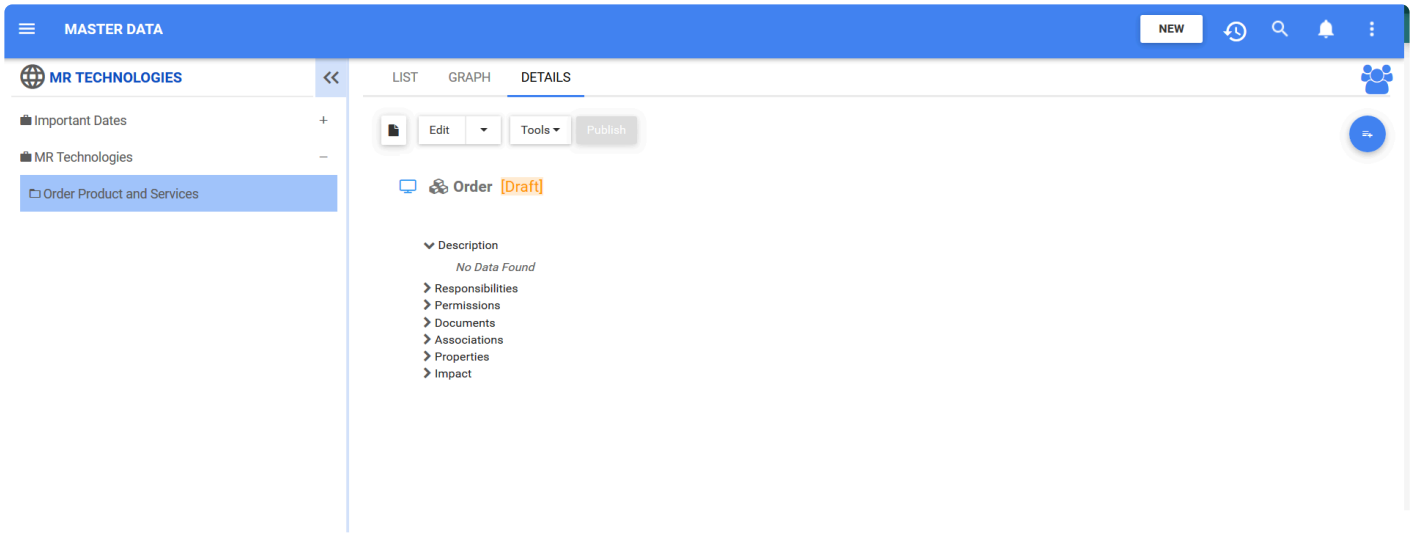


3. Click on the button 

to create the new Entity



4. The new Entity “Order” is now inside of the “Order Product and Services” folder. This Entity is currently a draft. To learn how to publish Master Data objects, click here


MASTER DATA
NEW
MR TECHNOLOGIES
Important Dates
MR Technologies
Order Product and Services
LIST
GRAPH
DETAILS
Edit
Tools
Publish
Order [Draft]
Description
No Data Found
Responsibilities
Permissions
Documents
Associations
Properties
Impact

12.9.1.4 Create an Attribute

Attributes represent individual, atomic pieces of data. Entities contain Attributes, and Web Modelers are responsible to assign the Attributes to their respective Entity.

In the Master Data structure, Attributes are found within Master Data Folders.

For instructions on how to create a new Attribute, see the Create Objects section.

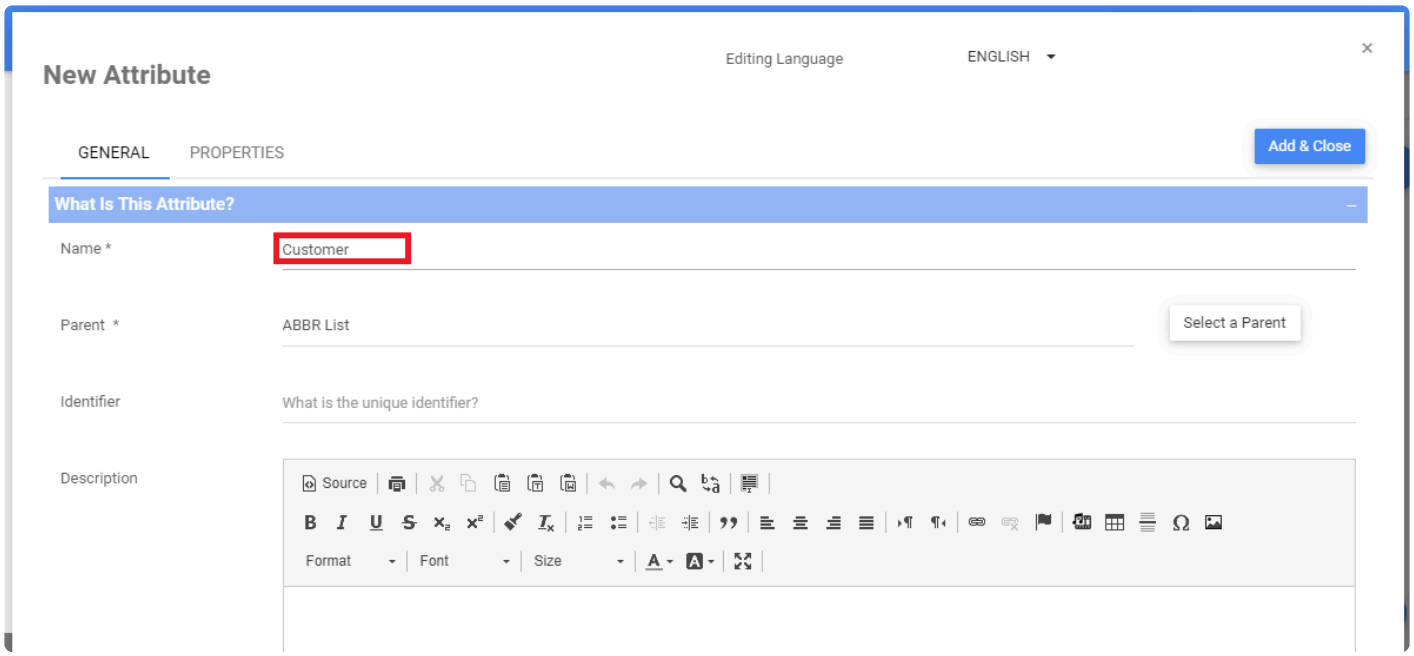
Filling out a New Attribute form

Ensure you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

1. Type the name of the Attribute on the “What is the name?” field

It is **mandatory** for Web Modelers to input a name for the Attribute

For this example, the name of the Attribute is “Customer”

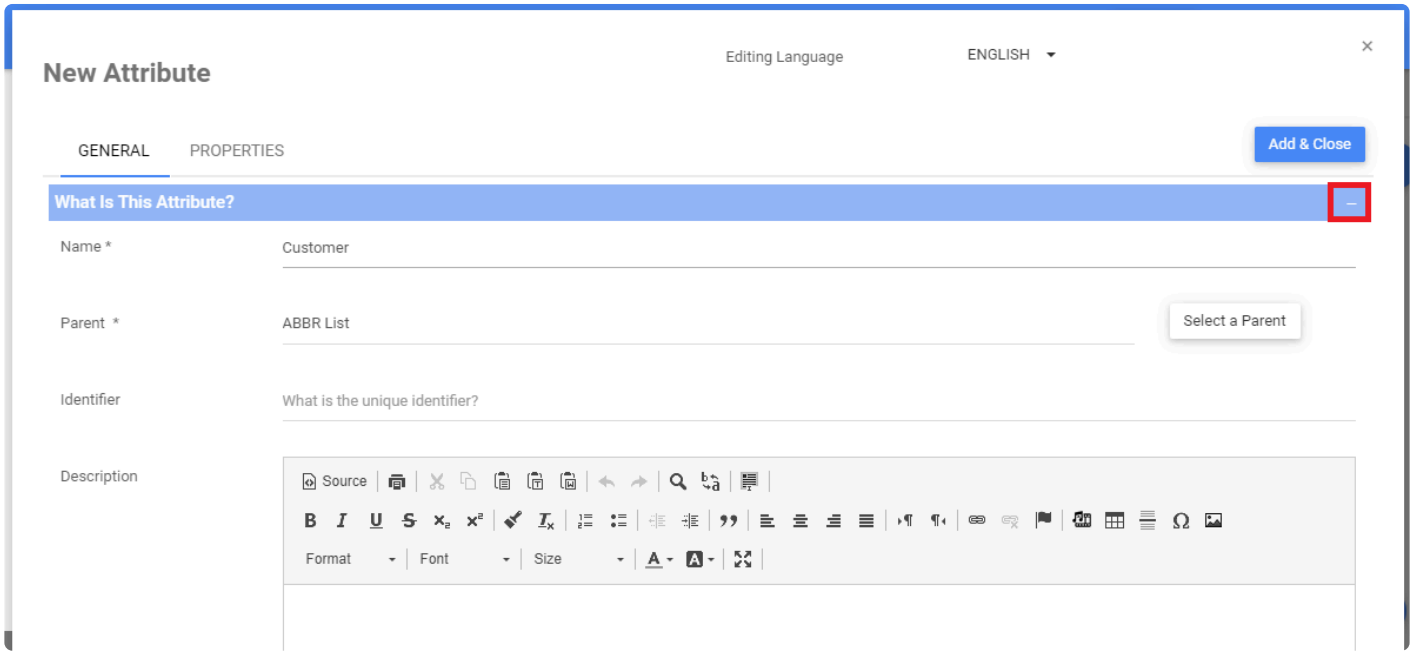


The EPC automatically assigns the Master Data Folder **you selected** as the Parent. If you wish to assign a different parent, click on the Select a Parent box.

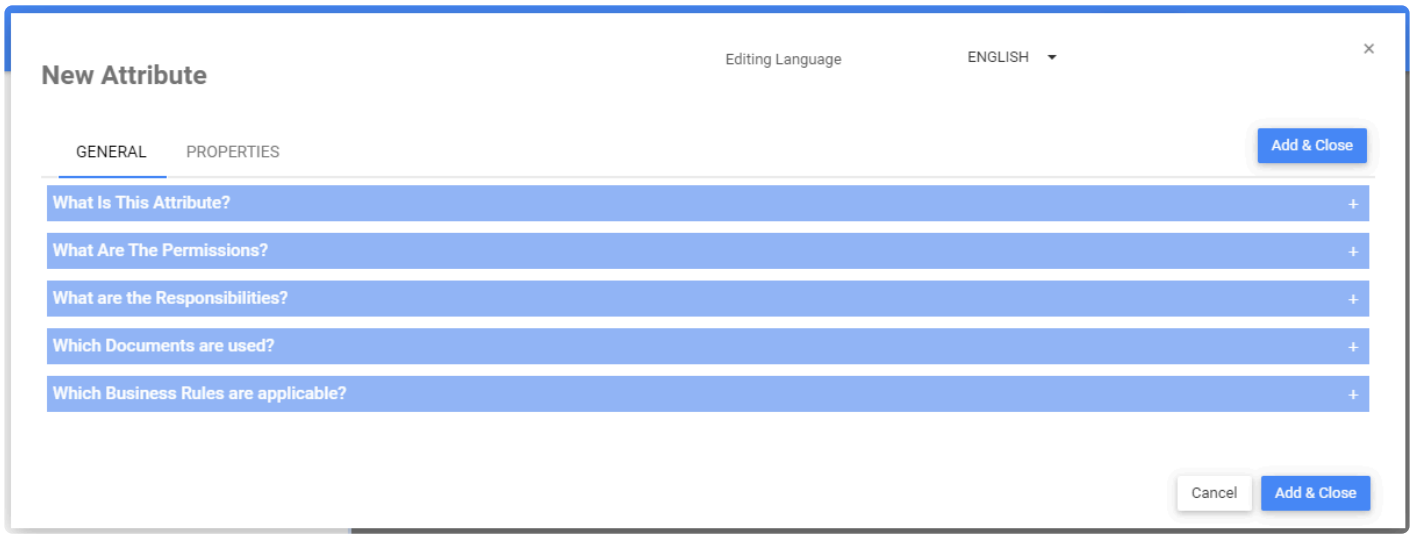
2. Use the + and − icons to expand and hide the different sections within each tab of the New Attribute Window. Input the right information about the Attribute in each section.

> The New Attribute window has two tabs, **General** and **Properties**. Under each tab there are different sections where the Web Modeler can input detailed information about the Attribute. To learn more about about each section and how to input information, click here

i) To hide sections, click on the − icon:

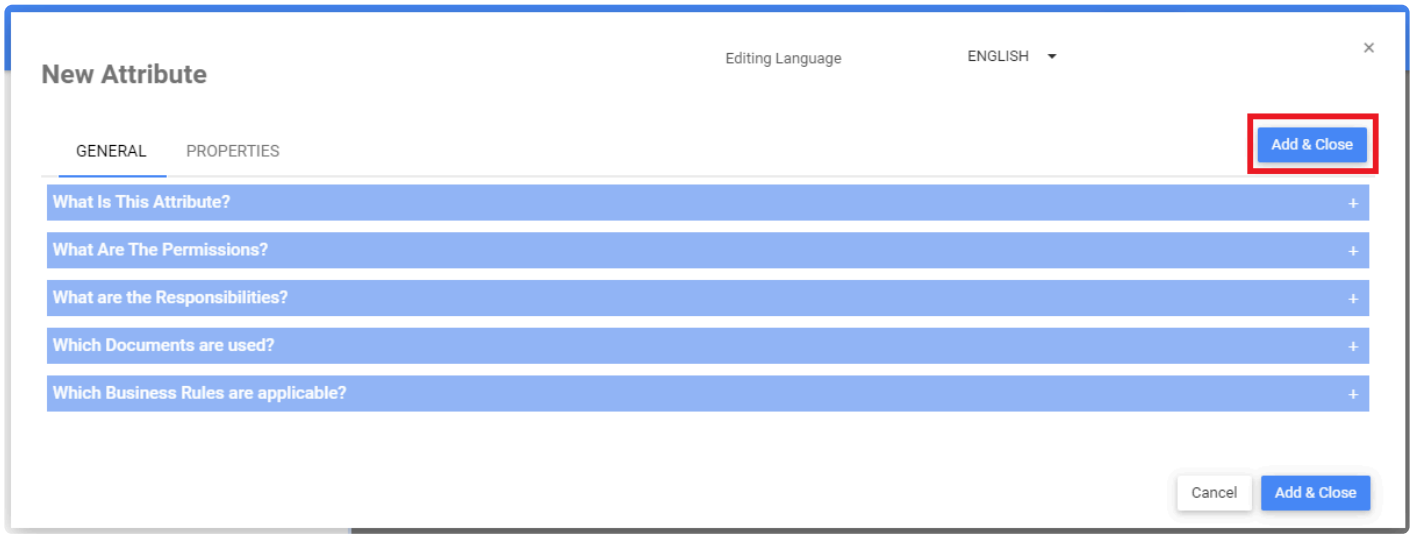


ii) To expand sections, click on the + icon:

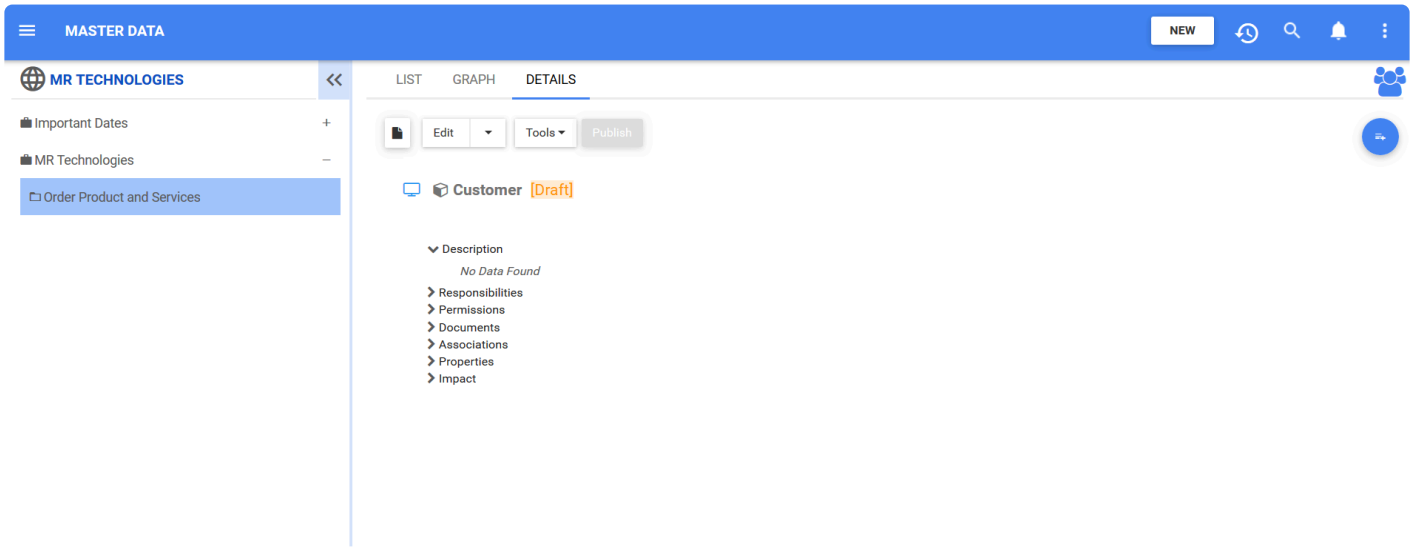


3. Click on the button

to create the new Attribute



4. The new Attribute “Customer” is now inside of the “Order Product and Services” folder. This Attribute is currently a draft. To learn how to publish Master Data objects, click here



12.9.2 Edit Master Data Objects

Web Modelers can edit the Details of Master Data objects. They need to navigate to the Edit button of the Master Data object to access the Edit Details window. The Edit Details window has two tabs, General, and Properties. Under each tab there are different sections where the Web Modeler can input detailed information about the Master Data object.

Web Modelers can choose the editing language in the Edit Details window.

Only users with the Web Modeler Permission will be able to see the Edit Button on the toolbar; the displayed content needs to be set to Show Latest, and the editing tool is the Web.

This section will cover the following:

1. “Edit Master Data General Details”
2. “Edit Master Data Properties Details”

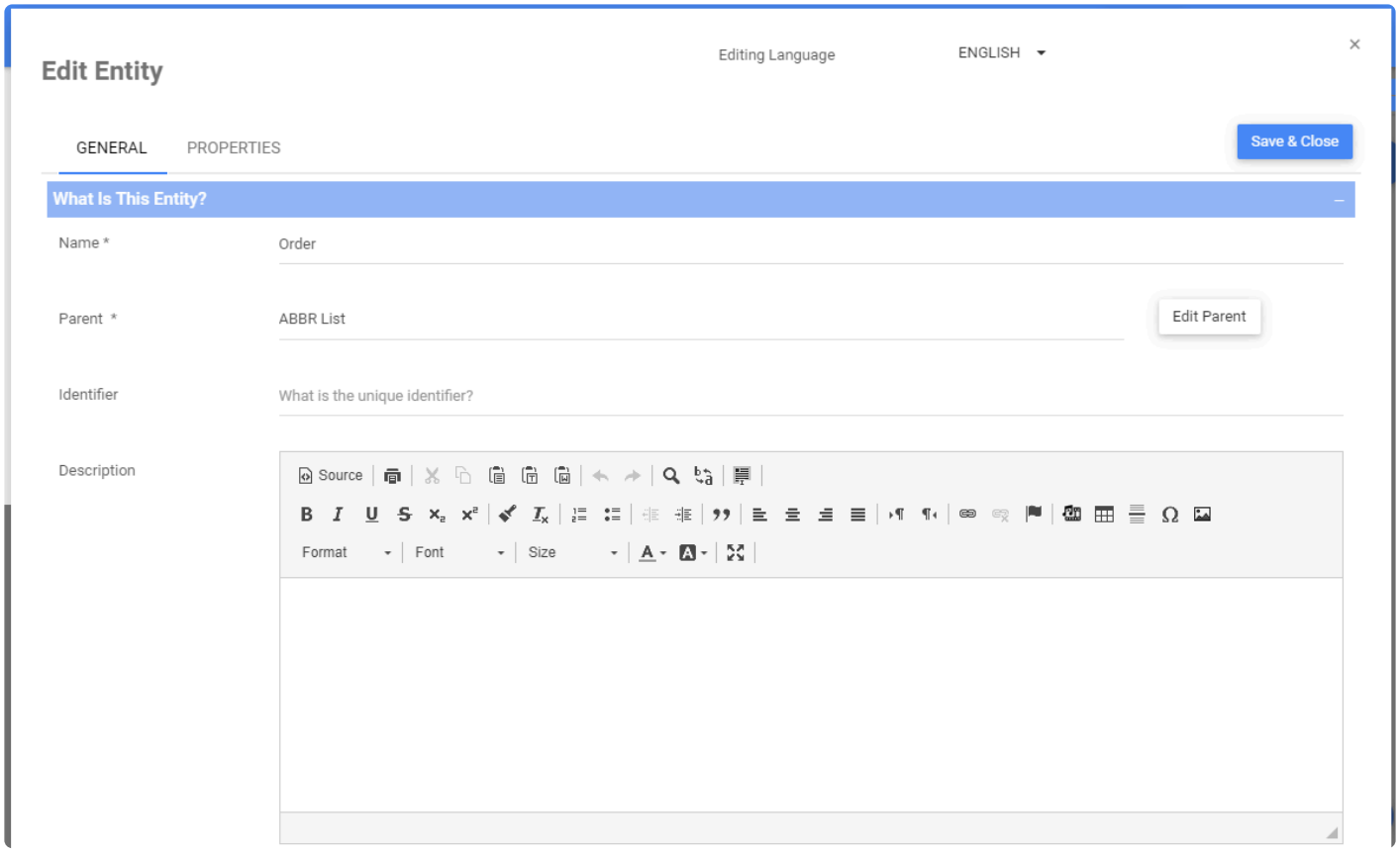
12.9.2.1 Edit Entity General Details

The General tab contains a section for the basic information about the Entity, the Entity's permissions, the location where the Entity is implemented, the attributes contained in the Entity, as well as the Responsibilities and Associations sections.

What is this Entity?

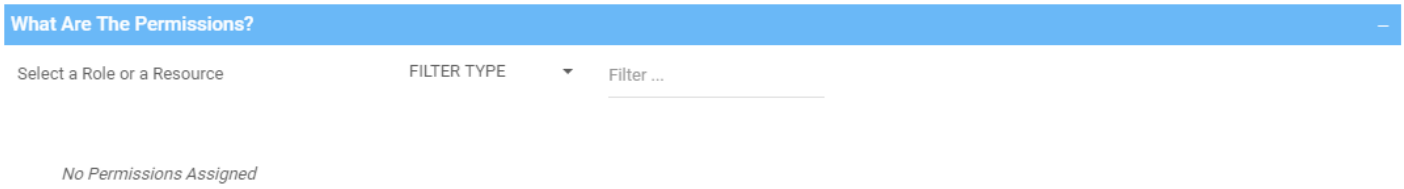
This table below describes the fields of this section.

Field	Description
Name	The name of this Entity. A name is **mandatory** for all objects.
Parent Folder	The Master Data Folder under which this Entity is nested. To learn how select a parent, click here
Identifier	The Unique Identifier of this Entity. This serves to uniquely identify the Entity as per your company protocol.
Description	This field describes the Entity in detail. The rich text format allows for text formatting, images, URLs, tables, etc.

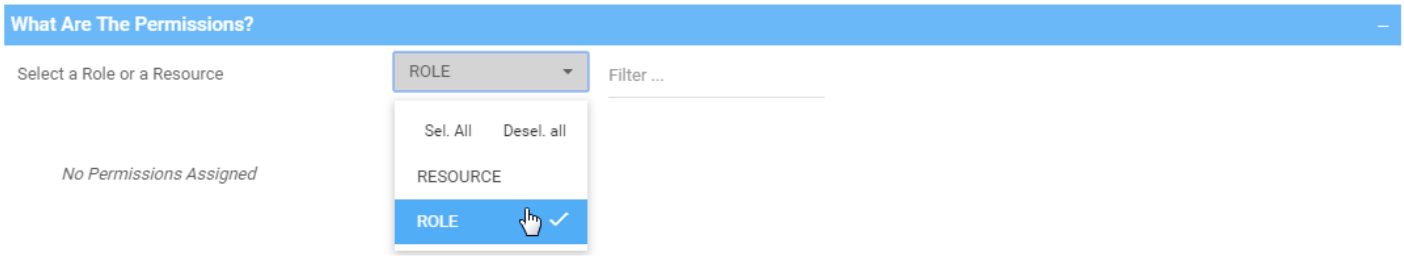


What Are The Permissions?

Web Modelers can assign the Roles or Resources that have permissions to access Entities. The type of association can be further specified using the Create, Read, Update, Delete (CRUD) options.

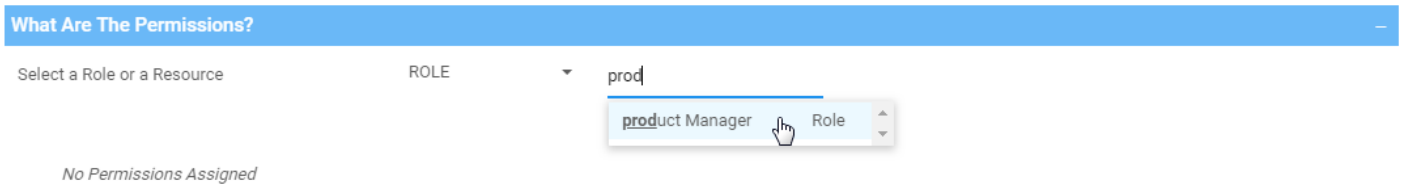


1. Choose the “Role” filter from the drop-down menu

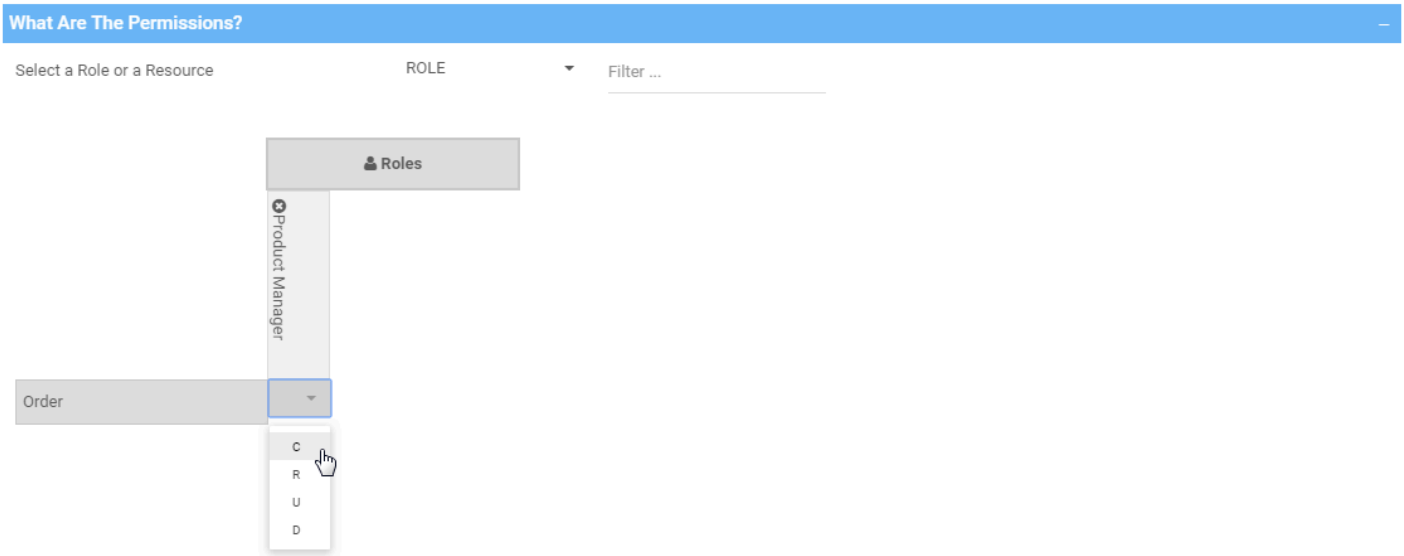


2. Navigate to the “Select a Role or a Resource” field, and type the name of the Role you want to associate. From the search suggestions, click to select the Role you want to associate.

The list of roles will populate based on key word typing

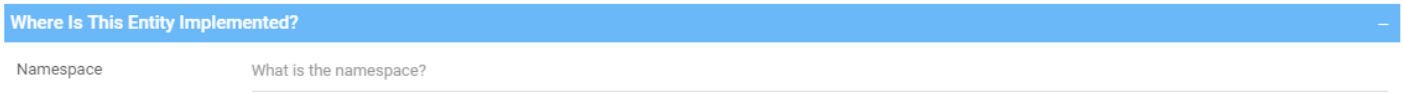


3. The Role will be associated. Navigate to the drop-down box to choose the level of CRUD



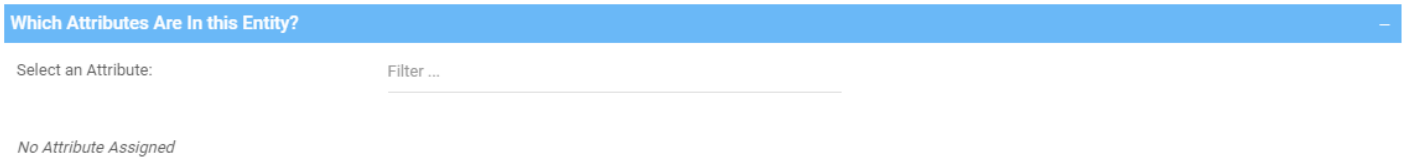
Where is This Entity Implemented?

This section allows users to specify a namespace in order to differentiate between various entities that may have the same name.

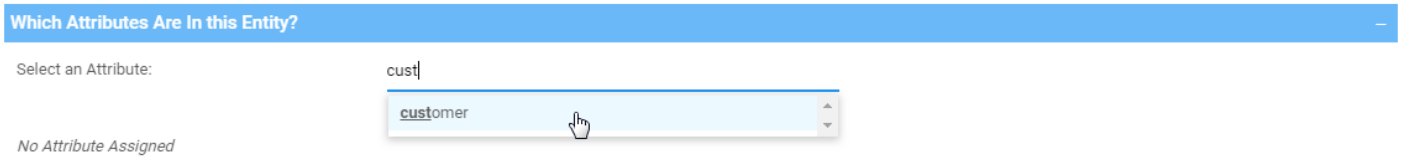


What Attributes are in this Entity?

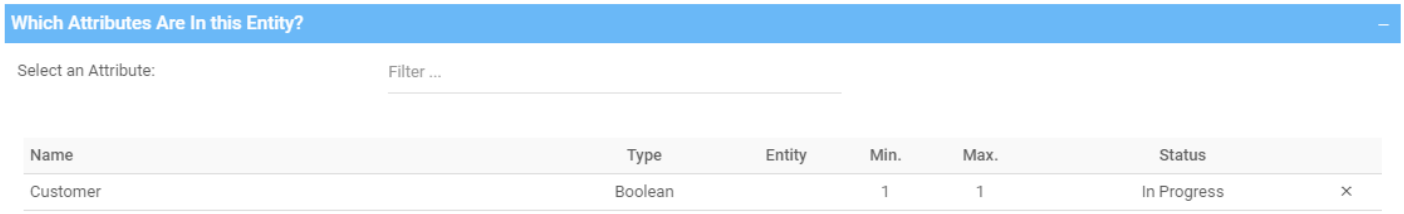
This section allows users to associate the Attributes that are related to the Entity.



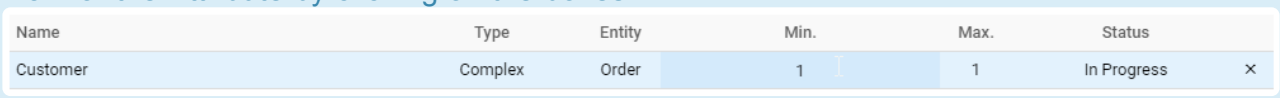
1. Navigate to the "Select an Attribute" field, and type the name of the Attribute. From the search suggestions, click to select the Attribute you want to associate.



2. The Attribute is now associated displayed on the table, along with the Attribute Type, the Entity, its Min, its Max, and its status.



If the Attribute's type is **Complex**, you will be able to in-line edit the cardinalties min and max for the Attribute by clicking on the boxes.



Associations

Since the Associations section is common to many EPC objects, the instructions have been centralized in the Associations section of the user manual. You can find direct links to instructions for specific sections below.

Section	Instructions
What are the Responsibilities?	Assign Responsibilities
Which Documents are used?	Associate Documents
Which Business Rules are Applicable?	Associate Business Rules

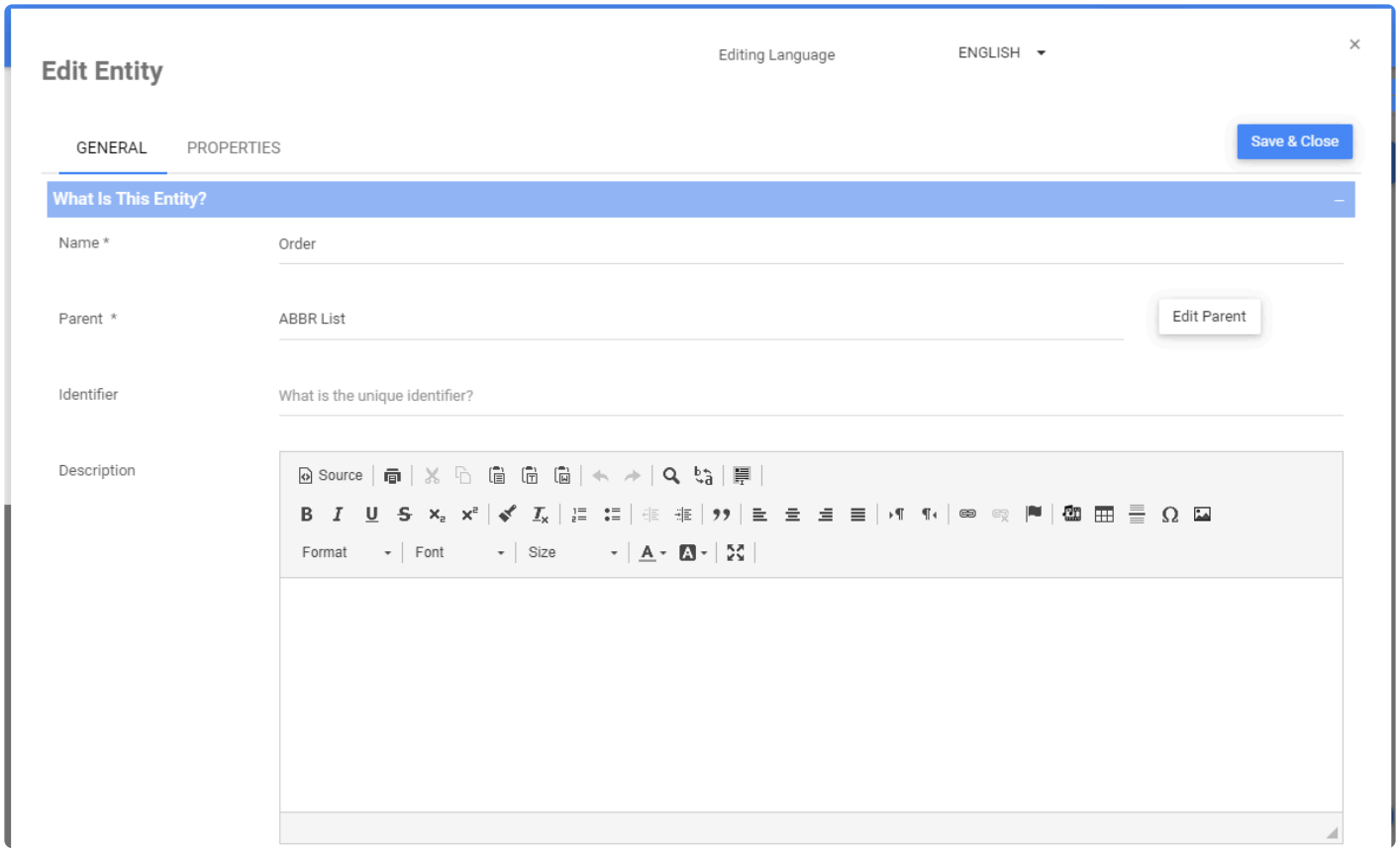
12.9.2.2 Edit Attribute General Details

The General tab contains a section for the basic information about the Attribute, the Attribute's permissions, as well as the Responsibilities and Associations sections.

What is this Attribute?

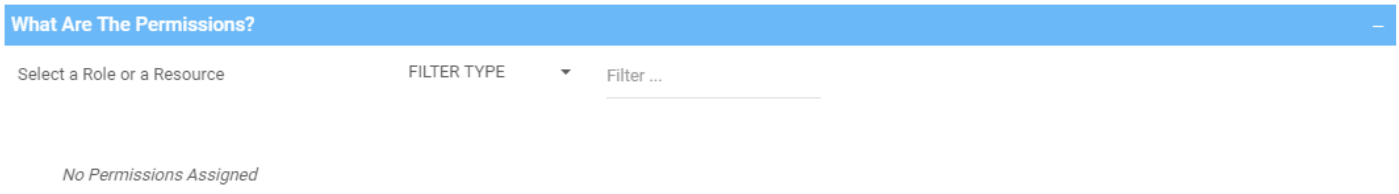
This table below describes the fields of this section.

Field	Description
Name	The name of this Attribute. A name is **mandatory** for all objects.
Parent Folder	The Master Data Folder under which this Attribute is nested. To learn how select a parent, click here
Identifier	The Unique Identifier of this Attribute. This serves to uniquely identify the Attribute as per your company protocol.
Description	This field describes the Attribute in detail. The rich text format allows for text formatting, images, URLs, tables, etc.

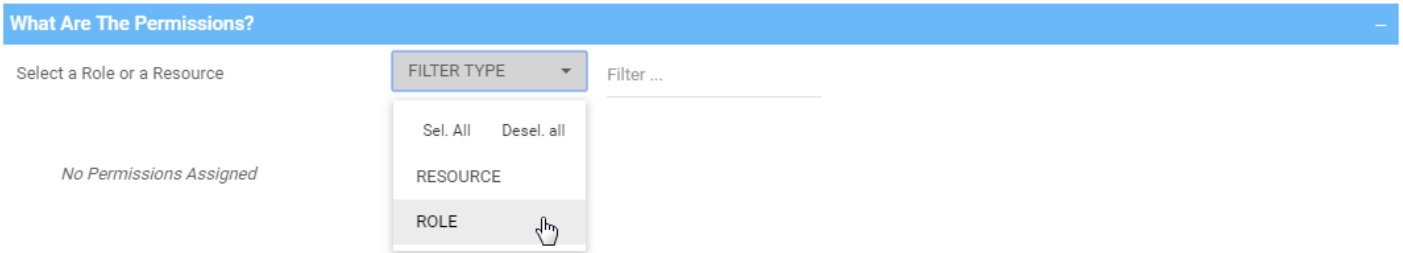


What Are The Permissions?

Web Modelers can assign the Roles or Resources that have permissions to access Attributes. The type of association can be further specified using the Create, Read, Update, Delete (CRUD) options.

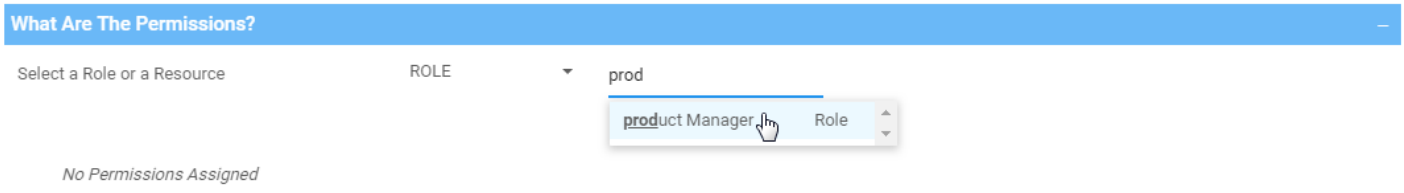


1. Choose the “Role” filter from the drop-down menu

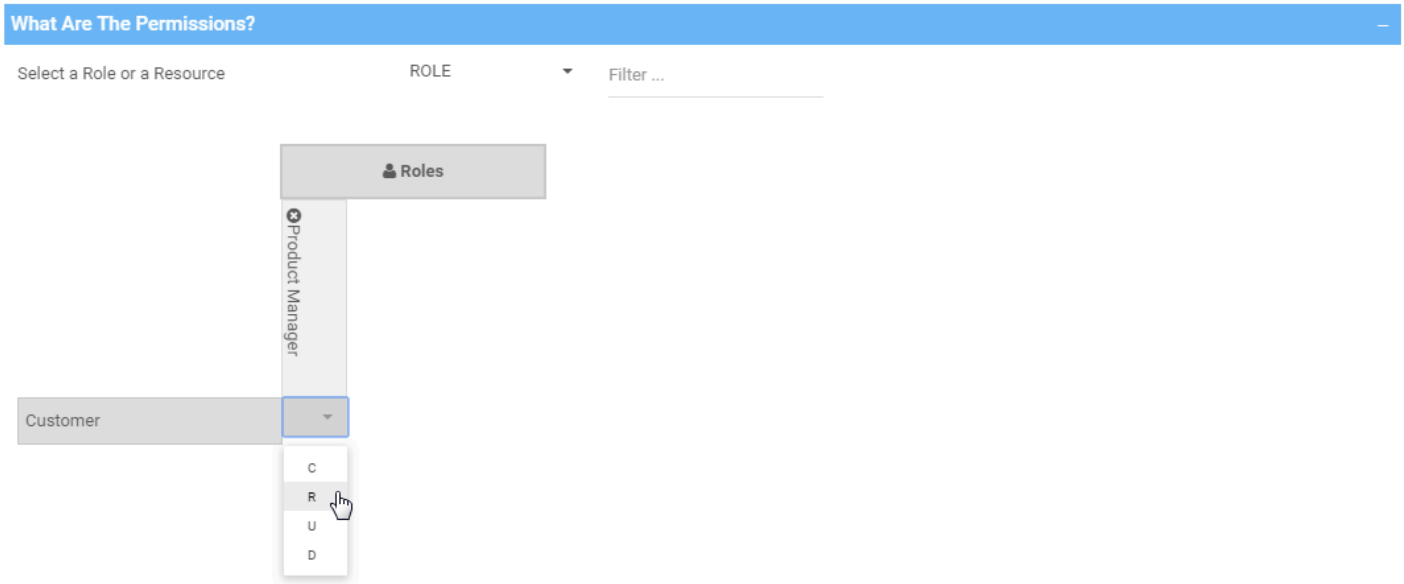


2. Navigate to the “Select a Role or a Resource” field, and type the name of the Role you want to associate. From the search suggestions, click to select the Role you want to associate.

The list of roles will populate based on key word typing



3. The Role will be associated. Navigate to the drop-down box to choose the level of CRUD



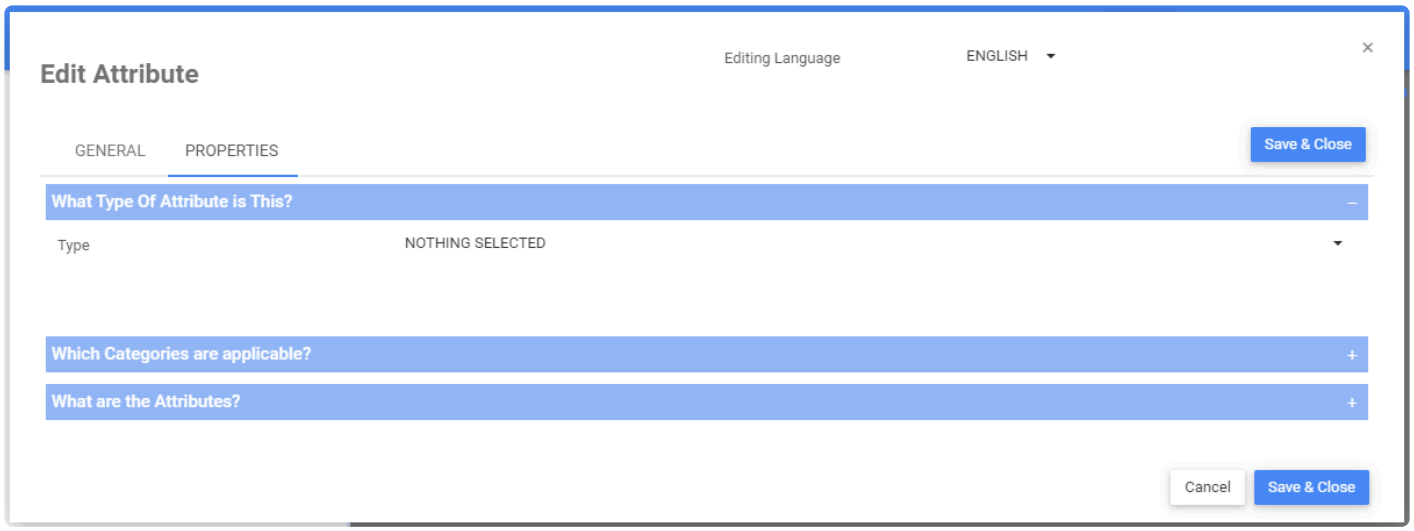
Associations

Since the Associations section is common to many EPC objects, the instructions have been centralized in the Associations section of the user manual. You can find direct links to instructions for specific sections below.

Section	Instructions
What are the Responsibilities?	Assign Responsibilities
Which Documents are used?	Associate Documents
Which Business Rules are Applicable?	Associate Business Rules

12.9.2.3 Edit Master Data Objects Properties Details

The Properties tab contains sections for the type, the categories applicable and the attributes.



Since the Properties sections are common to many EPC objects, the instructions have been centralized in the Properties section of the user manual. You can find direct links to instructions for specific sections below.

Section	Instructions
What type of [Object] is this?	Object Type
Which Categories are applicable?	Object Categories
What are the Attributes?	Object Attributes

12.9.3 Delete Master Data Objects

Web Modelers can Delete Master Data Objects if they have Delete security permission.

To learn how delete objects, click here

12.9.4 Publish Master Data Objects

Once Web Modelers finished creating Master Data Objects, they can publish it and allow all users with rights to view the objects.

To learn how to publish objects, click here

12.9.5 Master Data Objects Approval Cycle

Web Modelers can set Approval Cycles on Master Data Objects.

To learn how to set Approval Cycles, click here

12.9.6 Master Data Objects Security

Web Modelers that are System Admins, Environment Admins, have Full Control Allow permission or have Read + Write + Delete Permission can set security permissions on Master Data Objects.

To learn how to set security on an object, click here.

12.9.7 Move Master Data Objects

Users can move Entities, Attributes and Master Data Folders within the Rule Module in the EPC.

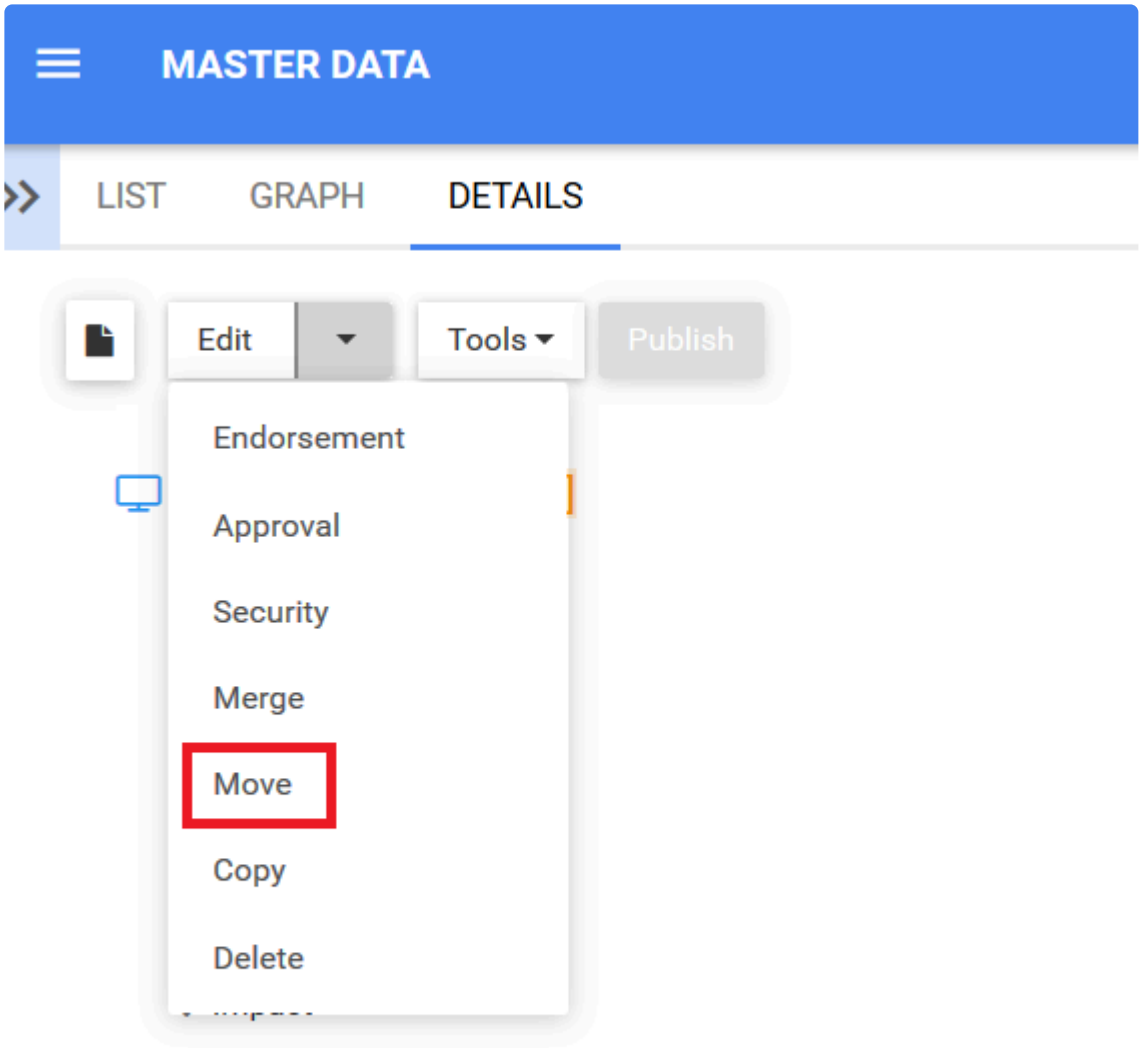
In Edit Mode, Master Data Folders can be moved from:

1. Folder to Folder
2. Folder to Set (Vice Versa)

Entities & Attributes can be moved from

1. Folder to Folder

To move Master Data Objects, navigate to the item's details page. Within the "Edit" dropdown, select "Move".



You can find further detail on Moving Objects in the EPC here.

12.9.8 Merge Master Data Objects

Users can merge similar objects in the EPC, allowing you to combine multiple objects into one. This action will allow you to remove duplicate items while maintaining their content and relationships in the application.

This capability is typically used in some of the following scenarios:

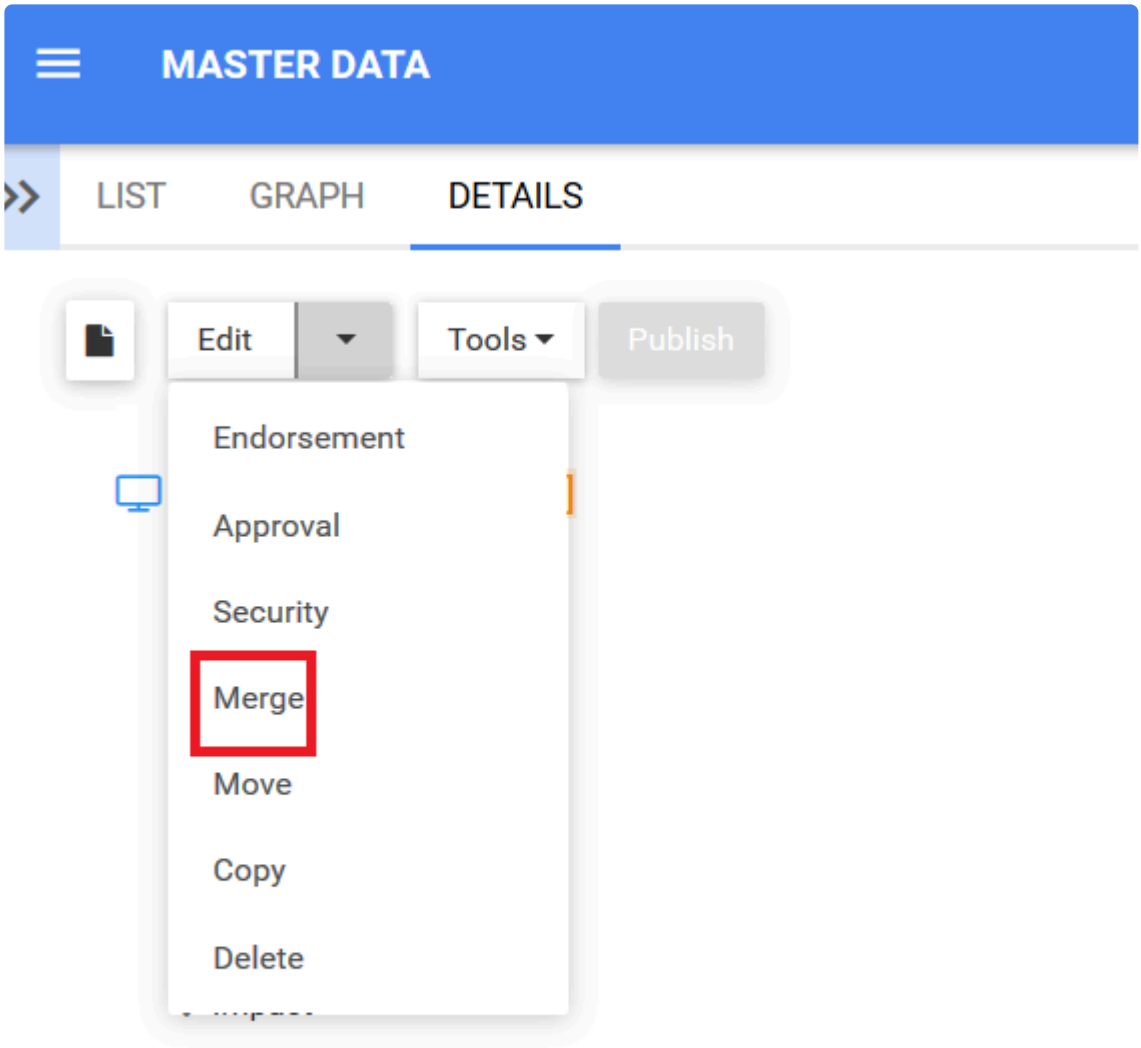
1. Remove duplicated items
2. Consolidate similar items
3. Adjust EPC content based on corporate restructurings and item re-definition

Within the Master Data Module users can

1. Merge Entities
2. Merge Attributes

> Please note that you can only Merge identical objects (i.e. KPIs can be merged with other KPIs, Objectives can be merged with other Objectives)

Users can find this feature on the details page of items. For further instructions on how to use our **Merge** feature, please see the work instructions here.


MASTER DATA
LIST
GRAPH
DETAILS
Edit
Tools
Publish
Endorsement
Approval
Security
Merge
Move
Copy
Delete

12.9.9 Generate Master Data Books

Your EPC now features object book generation, allowing you to leverage your EPC to dynamically create object specific reports and documents. After your editors have created and uploaded [document templates]() you can now uses these templates for the following modules:

These reports can be generated at:

a) The object level – allowing you to create reports about a specific object

b) The folder, process or org unit level – allowing you to create reports about objects INCLUDING there child objects

c) The Set level – allowing you to create large, summary documents including their child objects

For more information on how to generate object books, click [here]()

12.9.10 Master Data Object Endorsement Cycle

Web Modelers can set Endorsement Cycles on Master Data Objects.
To learn how to set Endorsement Cycle, click here

12.10 Collaboration Edit

Web Modelers are responsible edit Collaboration objects.

The Collaboration Edit section will cover the following:

1. Implement Improvement Requests

12.10.1 Implement Improvement Requests

Web Modelers are responsible to implement Improvement Requests.

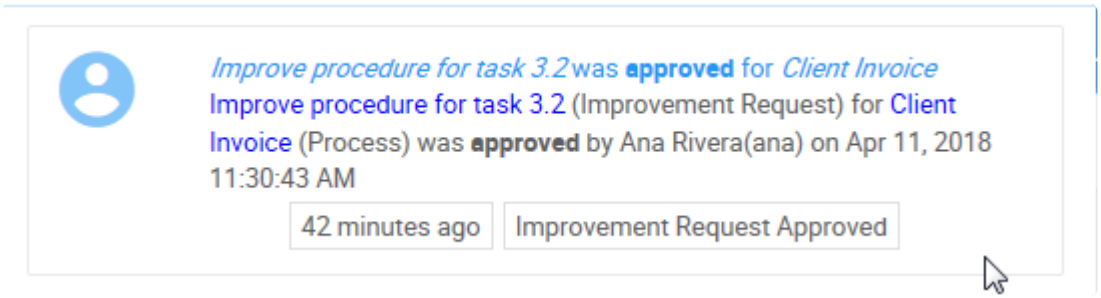
Users will create new Improvement Requests in the Collaboration section of objects. The Accountable user will approve or reject the request and then assign the Web Modeler implementer. After this step, the Web Modeler will be able to implement the Improvement Request.

Navigate to the Improvement Request section, to learn more about this collaboration topic.

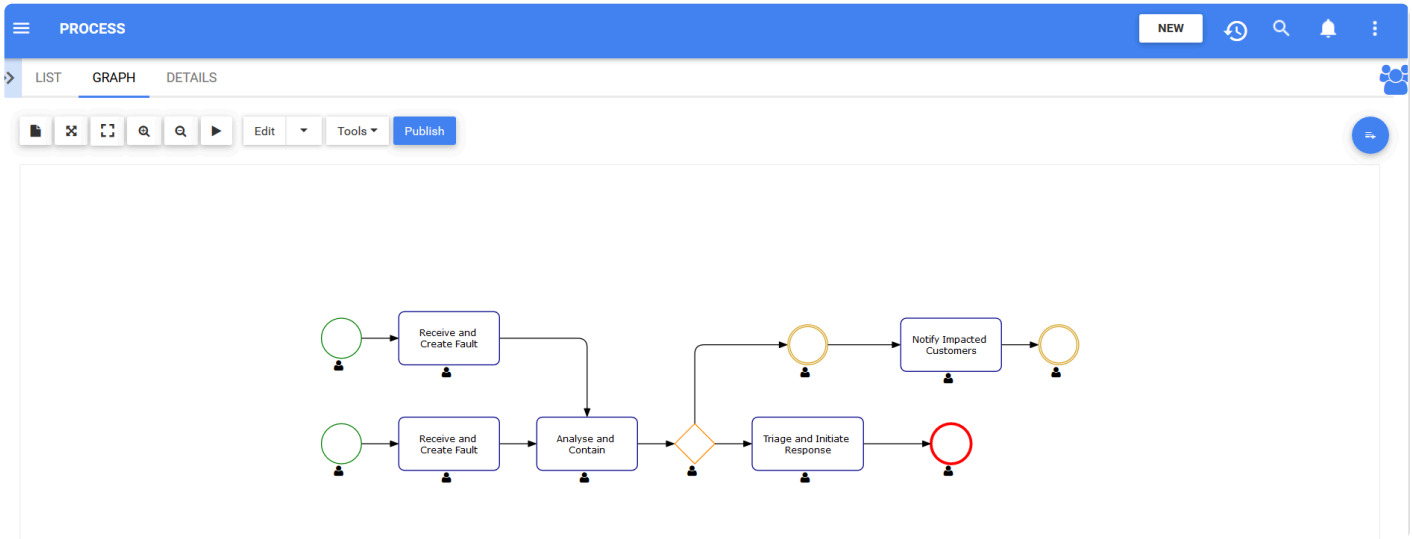
To Implement Improvement Requests, follow these steps

> Ensure you were assigned as IR Implementer, you are given the permission to be a Web Modeler, the displayed content is set to Show Latest, and your editing tool is the Web.

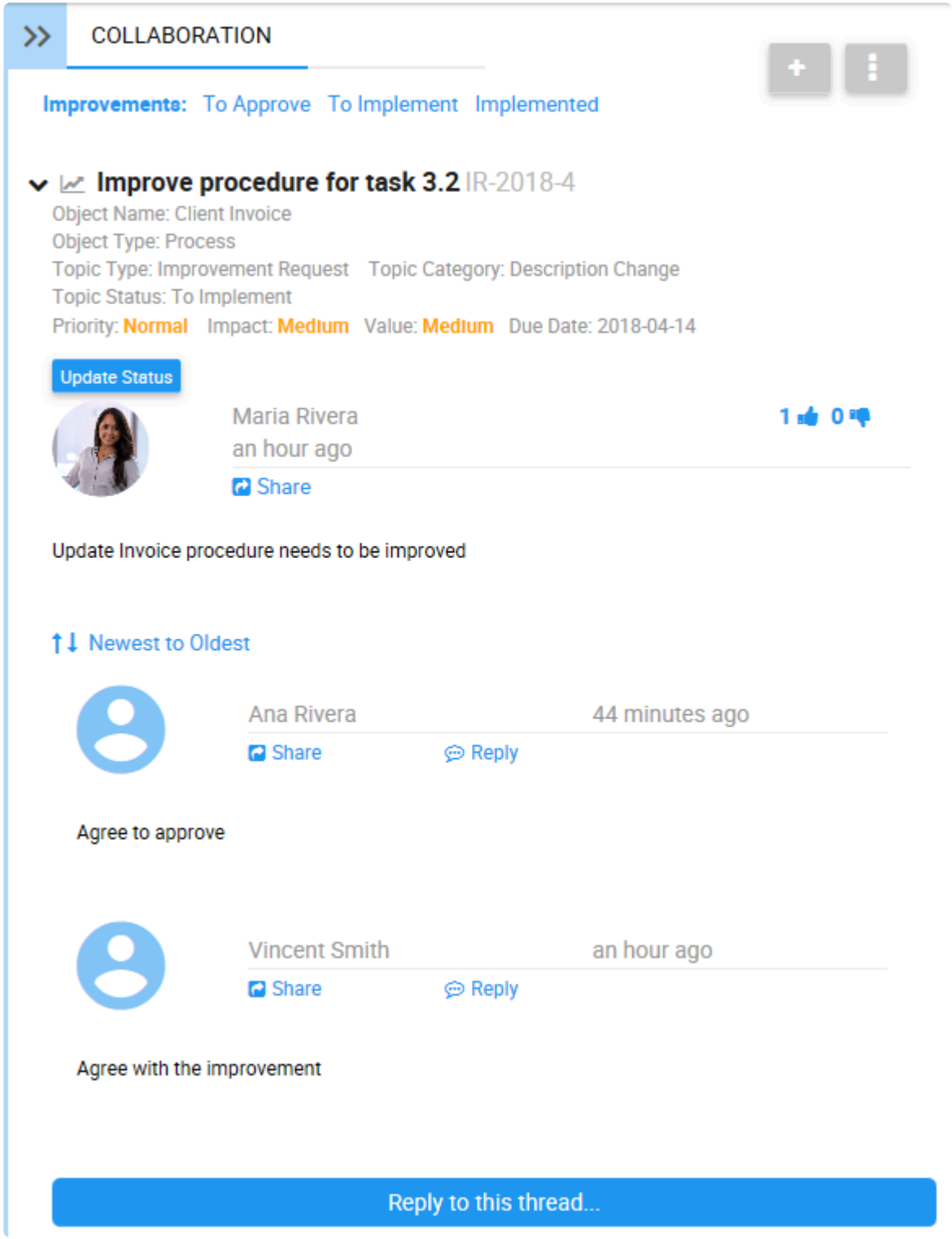
1. The Web Modeler assigned as IR Implementer will receive a notification

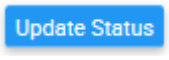


2. Navigate to the object where the Improvement Request was made. Use the Edit button to edit the object and implement the changes. In this example, the object is a process

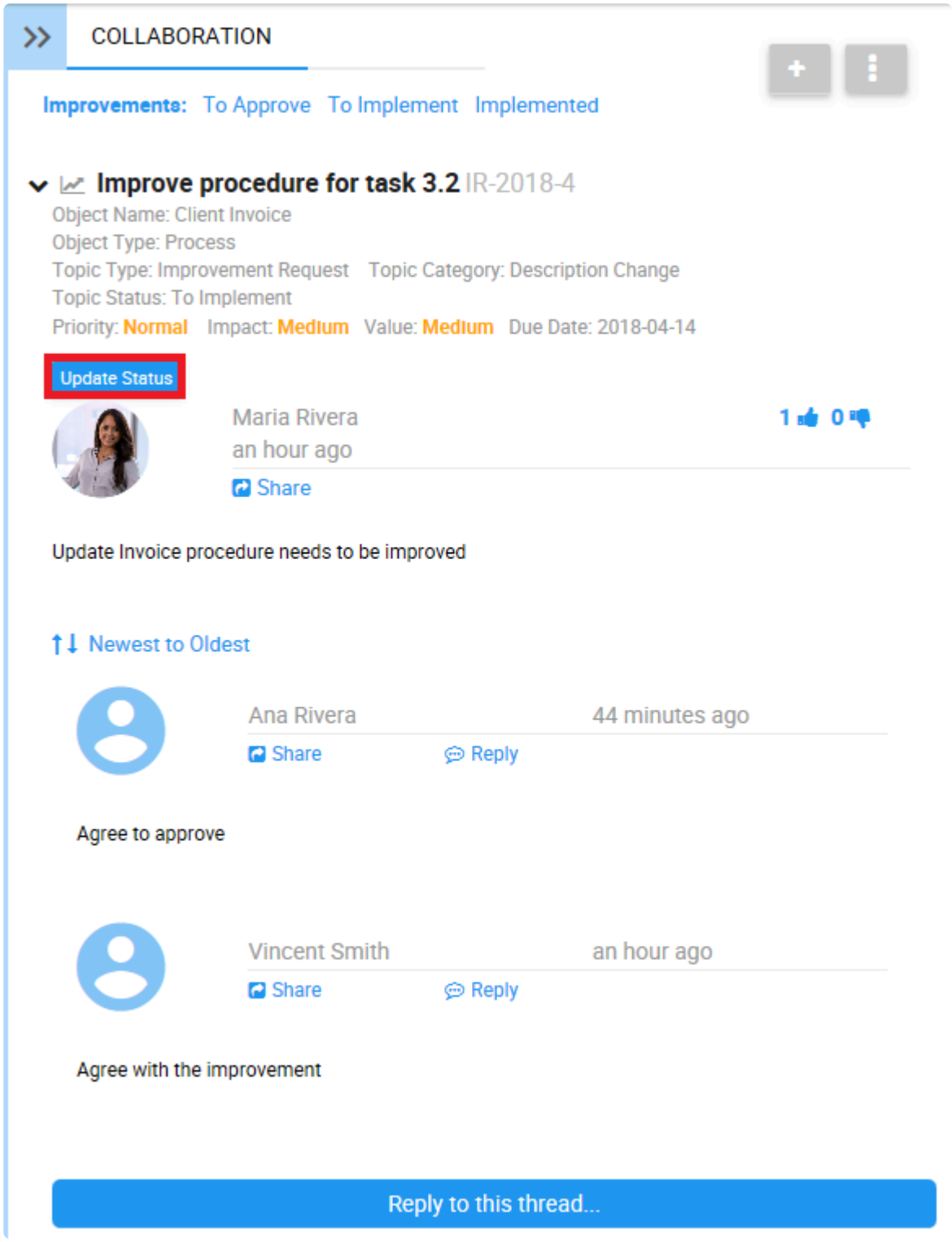


3. After Improvement Request was implemented, navigate to the Collaboration tab

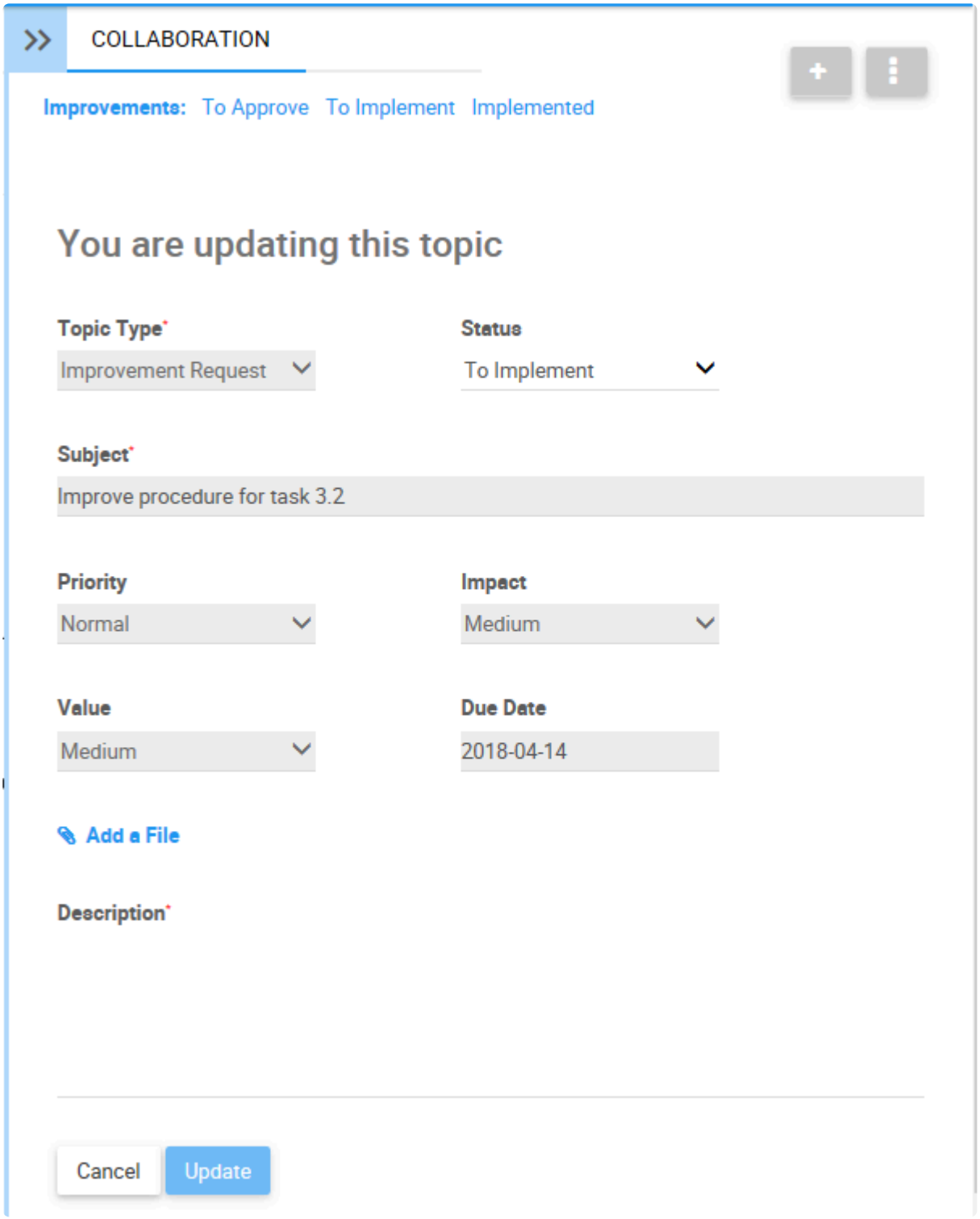


4. Click on the 

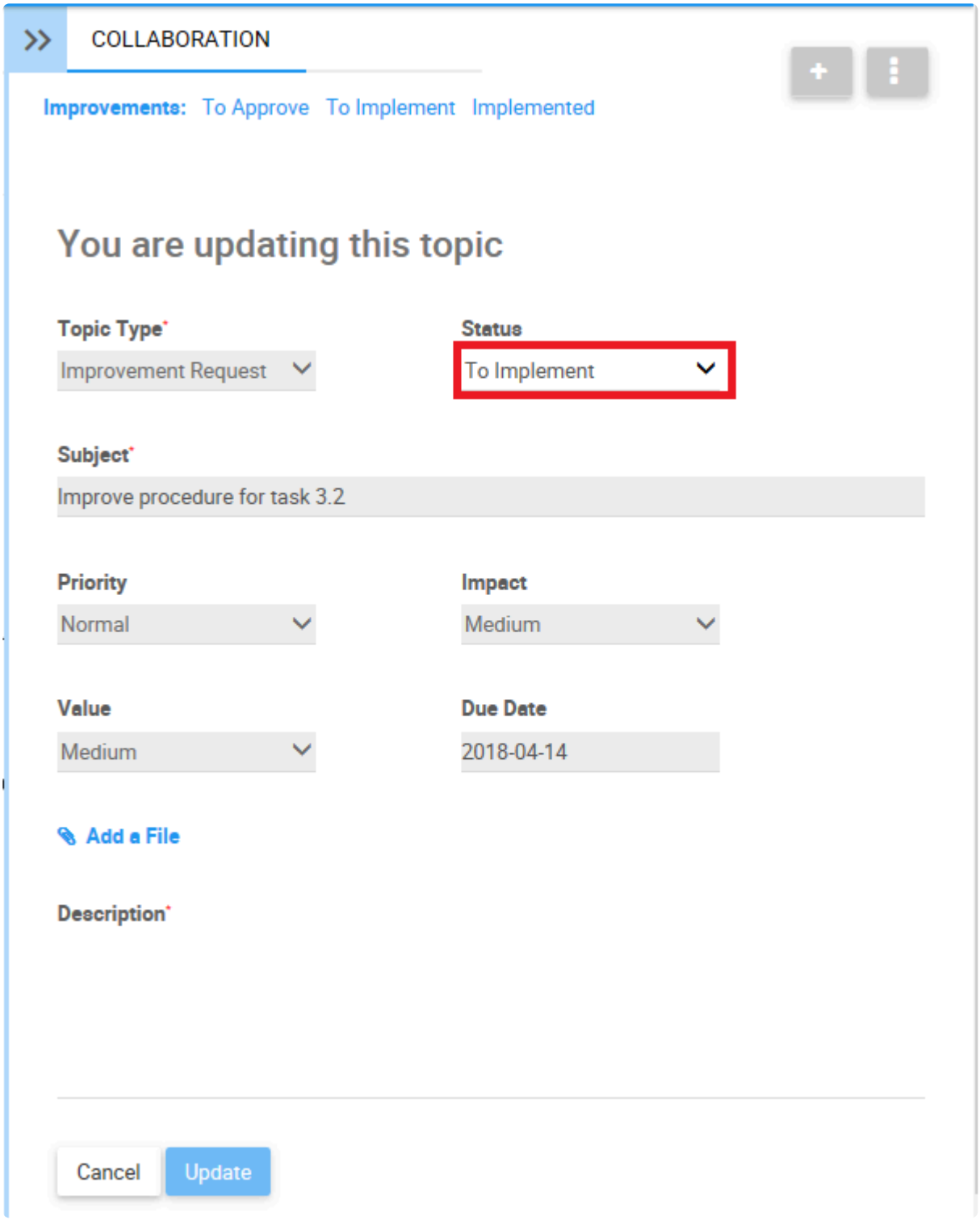
box



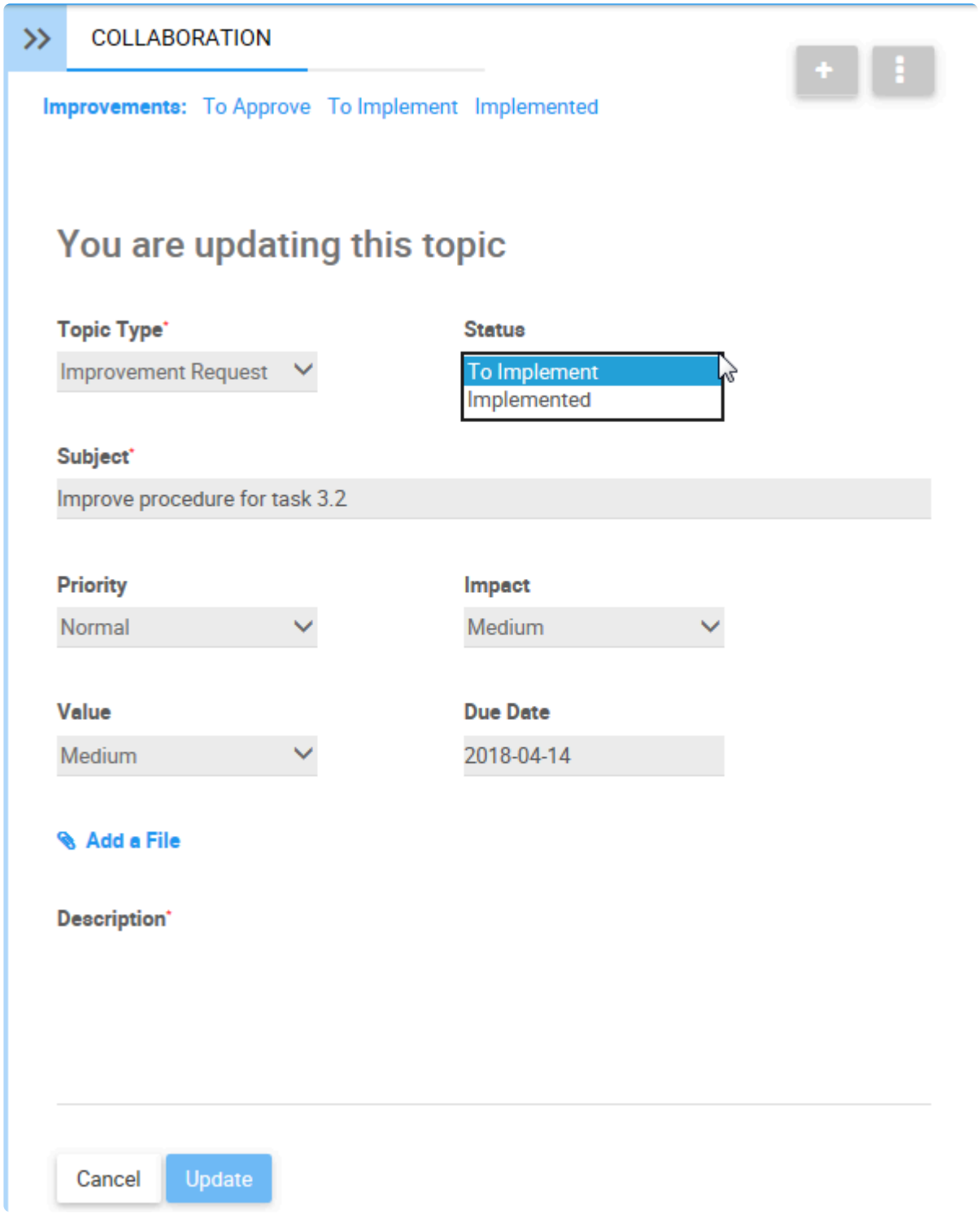
5. You will be redirected to the window where you can update the status of the IR



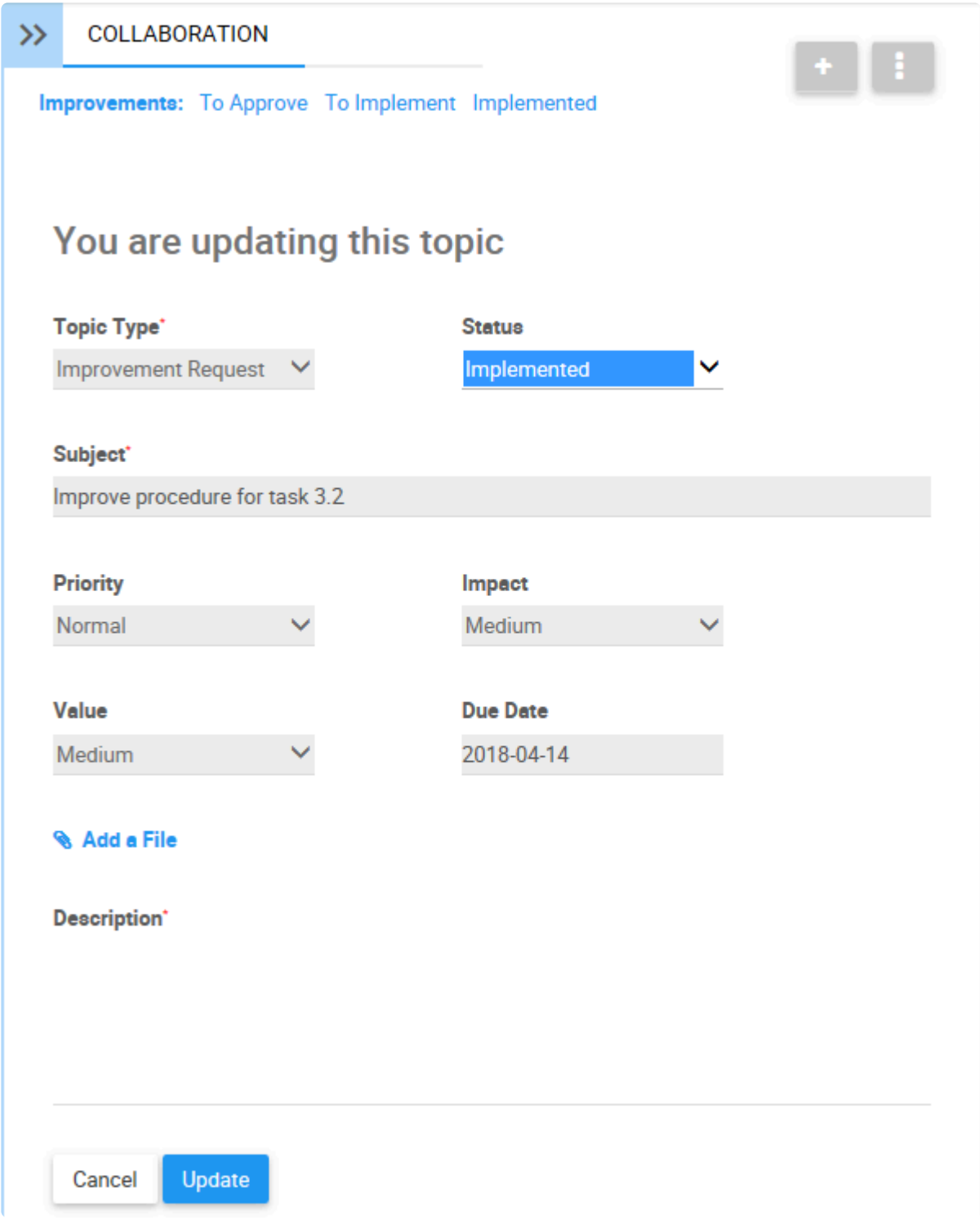
6. Click on the Status box



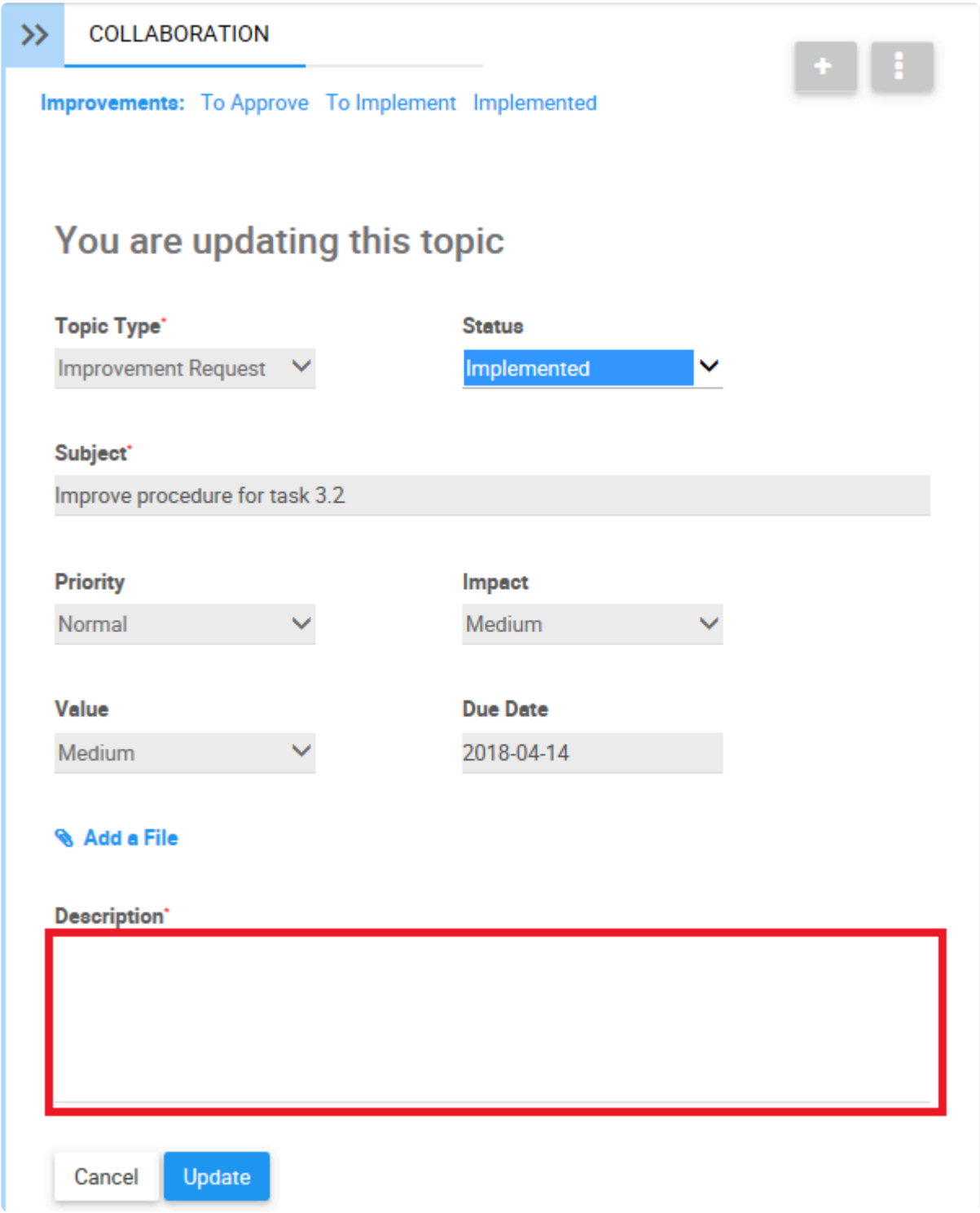
7. A drop-down menu will be generated



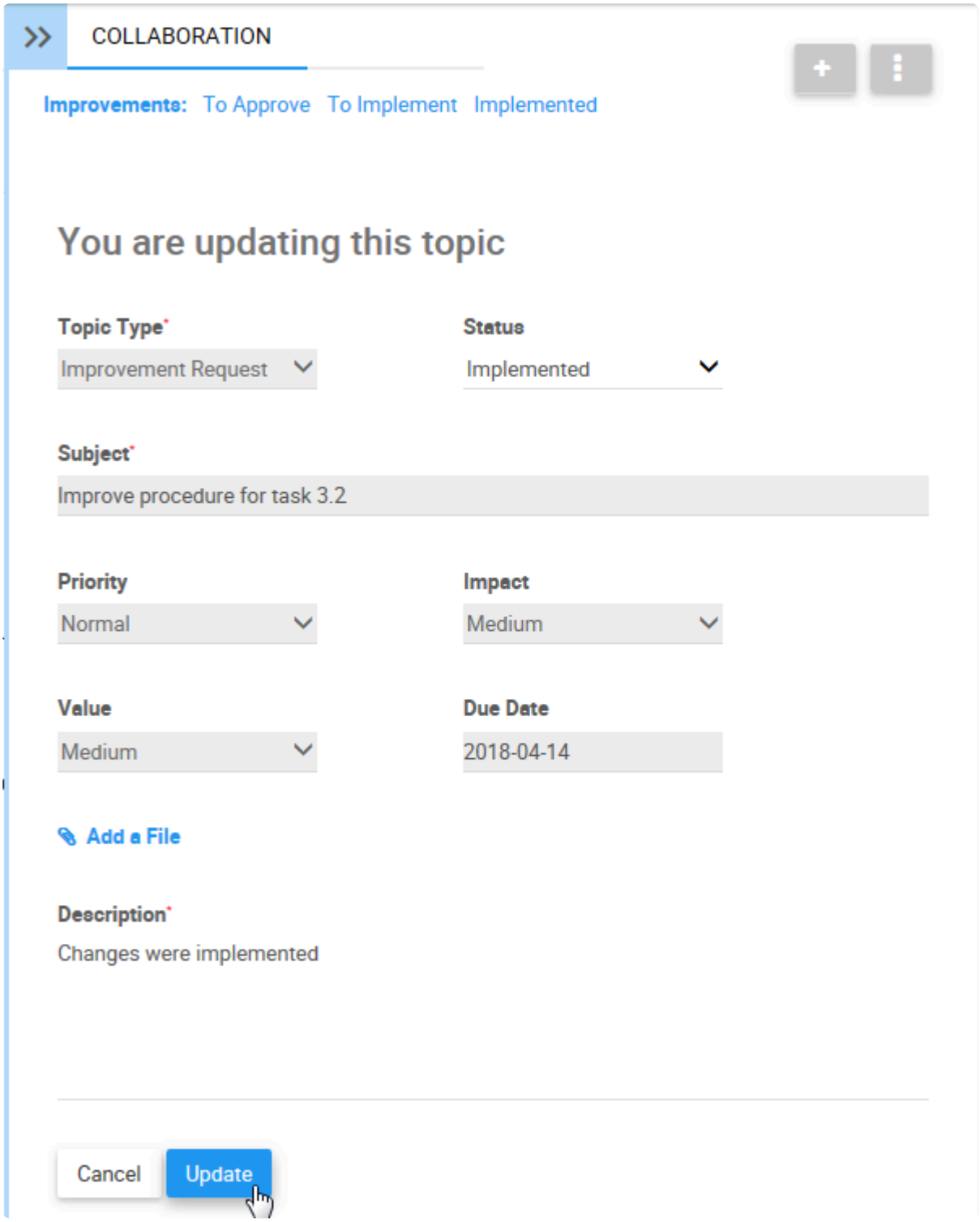
8. Change the status to “Implemented”



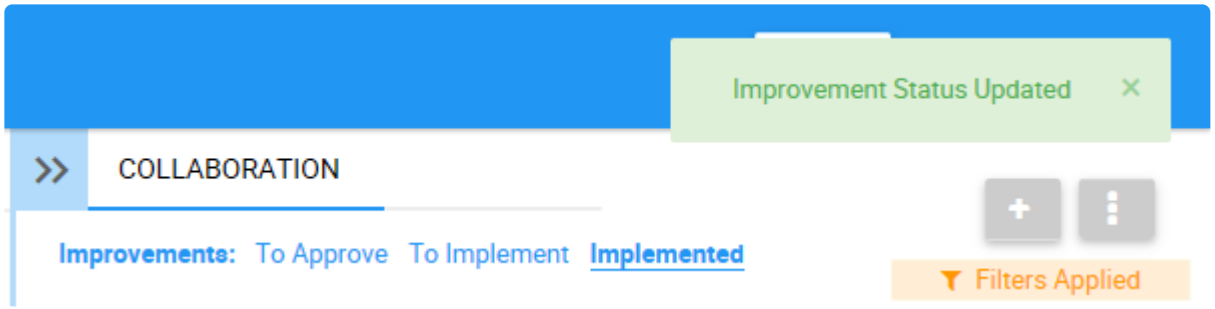
9. Input a description



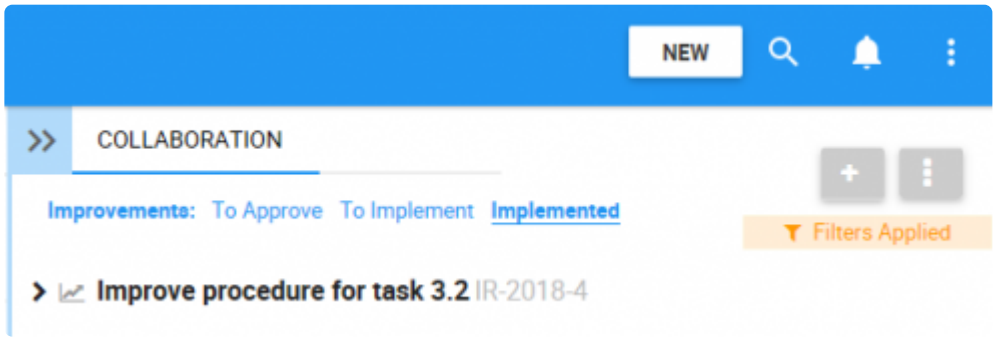
10. Click on the Update box to updated the status of the Improvement Request



11. You will receive a notification saying the topic updated successfully



12. The topic was moved to the “Implemented” section of the collaboration window



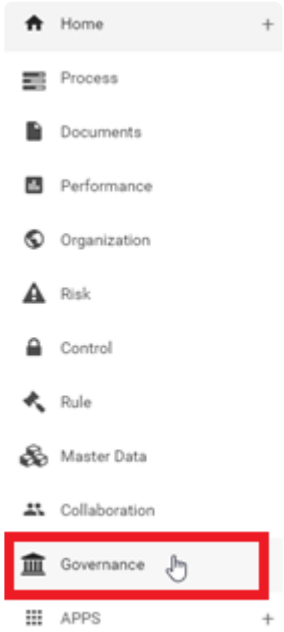
Note: to close the Improvement Request, please publish the updated object.

12.11 Governance Edit

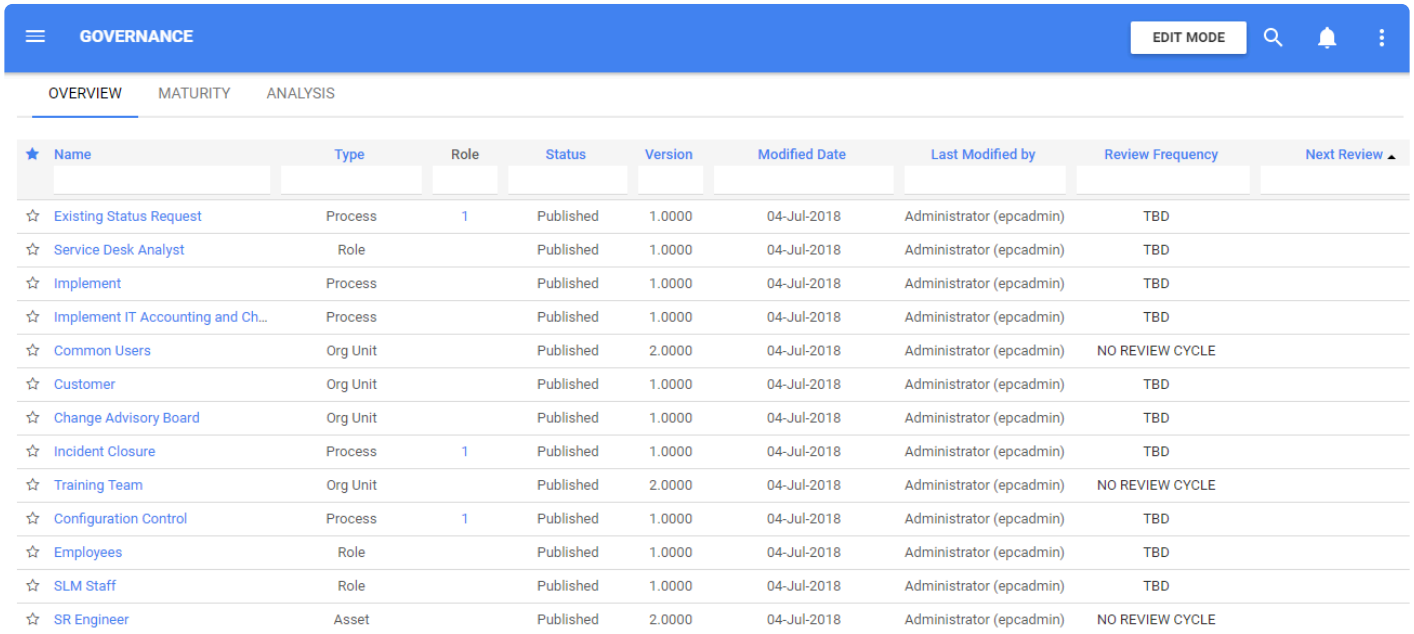
The Governance Module is a centralized place to edit and analyze different elements that are directly related to the processes. This module regroups a lot of information, and allows process owners to have better control, and to add real-time data to their processes. To access the Governance Module, you need to:

1. Click on the icon located at the top-left of the EPC page

2. Click on the Governance Module



3. You are directly on the Overview Tab of the module



Name	Type	Role	Status	Version	Modified Date	Last Modified by	Review Frequency	Next Review
Existing Status Request	Process	1	Published	1.0000	04-Jul-2018	Administrator (epcadmin)	TBD	
Service Desk Analyst	Role		Published	1.0000	04-Jul-2018	Administrator (epcadmin)	TBD	
Implement	Process		Published	1.0000	04-Jul-2018	Administrator (epcadmin)	TBD	
Implement IT Accounting and Ch...	Process		Published	1.0000	04-Jul-2018	Administrator (epcadmin)	TBD	
Common Users	Org Unit		Published	2.0000	04-Jul-2018	Administrator (epcadmin)	NO REVIEW CYCLE	
Customer	Org Unit		Published	1.0000	04-Jul-2018	Administrator (epcadmin)	TBD	
Change Advisory Board	Org Unit		Published	1.0000	04-Jul-2018	Administrator (epcadmin)	TBD	
Incident Closure	Process	1	Published	1.0000	04-Jul-2018	Administrator (epcadmin)	TBD	
Training Team	Org Unit		Published	2.0000	04-Jul-2018	Administrator (epcadmin)	NO REVIEW CYCLE	
Configuration Control	Process	1	Published	1.0000	04-Jul-2018	Administrator (epcadmin)	TBD	
Employees	Role		Published	1.0000	04-Jul-2018	Administrator (epcadmin)	TBD	
SLM Staff	Role		Published	1.0000	04-Jul-2018	Administrator (epcadmin)	TBD	
SR Engineer	Asset		Published	2.0000	04-Jul-2018	Administrator (epcadmin)	NO REVIEW CYCLE	

The Governance Module is divided in three tabs with specific content for each of them, to categorize the different elements that can be viewed and modified. In the following tabs, you can respectively edit and analyze your Review Dates, your Process Maturity and your Process Analysis:

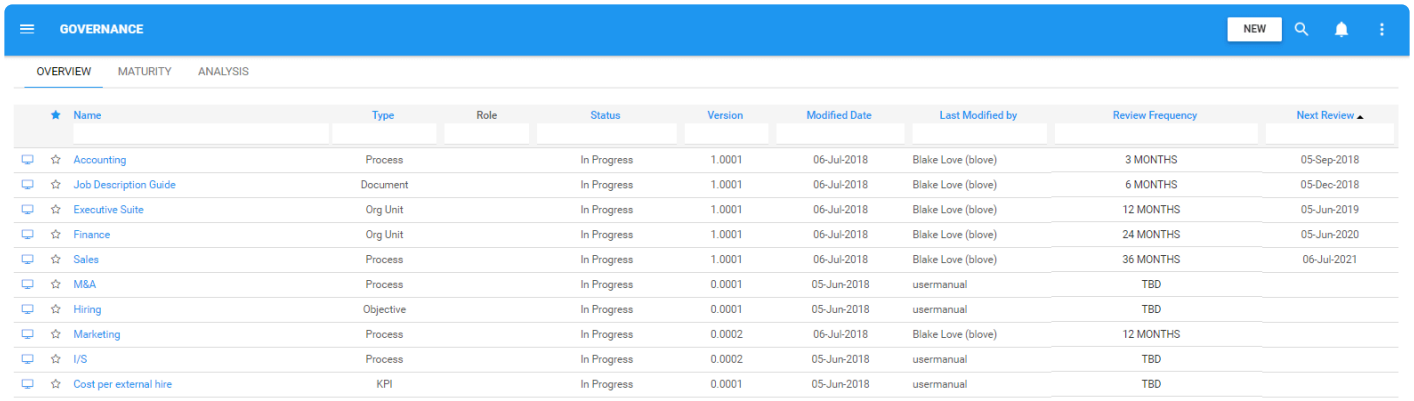
- 12.11.1 Review Dates
- 12.11.2 Process Maturity
- 12.11.3 Process Analysis

Lock

Any element that can be edited in the Governance module will be prevented if the object is locked. The user will receive an error message.

12.11.1 Overview Tab

The Overview tab of Governance lists all EPC objects and allows for edit and analysis of their review frequencies. Review cycles serve an important need for organizations seeking to fulfill compliance requirements, and thanks to EPC's automated generation of review dates, object owners are advised when an object review is approaching, and when it is overdue.



Name	Type	Role	Status	Version	Modified Date	Last Modified by	Review Frequency	Next Review
Accounting	Process		In Progress	1.0001	06-Jul-2018	Blake Love (blove)	3 MONTHS	05-Sep-2018
Job Description Guide	Document		In Progress	1.0001	06-Jul-2018	Blake Love (blove)	6 MONTHS	05-Dec-2018
Executive Suite	Org Unit		In Progress	1.0001	06-Jul-2018	Blake Love (blove)	12 MONTHS	05-Jun-2019
Finance	Org Unit		In Progress	1.0001	06-Jul-2018	Blake Love (blove)	24 MONTHS	05-Jun-2020
Sales	Process		In Progress	1.0001	06-Jul-2018	Blake Love (blove)	36 MONTHS	06-Jul-2021
M&A	Process		In Progress	0.0001	05-Jun-2018	usermanual	TBD	
Hiring	Objective		In Progress	0.0001	05-Jun-2018	usermanual	TBD	
Marketing	Process		In Progress	0.0002	06-Jul-2018	Blake Love (blove)	12 MONTHS	
I/S	Process		In Progress	0.0002	05-Jun-2018	usermanual	TBD	
Cost per external hire	KPI		In Progress	0.0001	05-Jun-2018	usermanual	TBD	

What EPC objects have review cycles?

All EPC business objects can have review cycles. This gives you the most flexibility possible to manage reviews based on your compliance requirements. The following objects can have a review cycle:

- Processes
- Organization Units
- Roles
- Resources
- Assets
- Documents
- Business Rules
- Risks
- Controls
- Performance Objectives
- KPIs
- KCIs
- KRIs
- Master Data Entities
- Master Data Attributes

Who can edit the Review Frequency?

You must have EPC Modeler privilege, and have Write permissions on the object.

Who is expected to review an object?

Object owners are responsible for object reviews. Therefore, any user who is Accountable (A) of the Responsibilities (RASCI-VS) on an object is expected to manage the revision of the object.

What Review Frequencies are available?

- No Review Cycle
- 3 Months
- 6 Months
- 12 Months
- 24 Months
- 36 Months

How are review dates generated?

Review dates are generated based on the **publish date** of the most current published version of the object. Therefore, when an object has a defined Review Frequency, each time it is published, the Review Date is recalculated as:

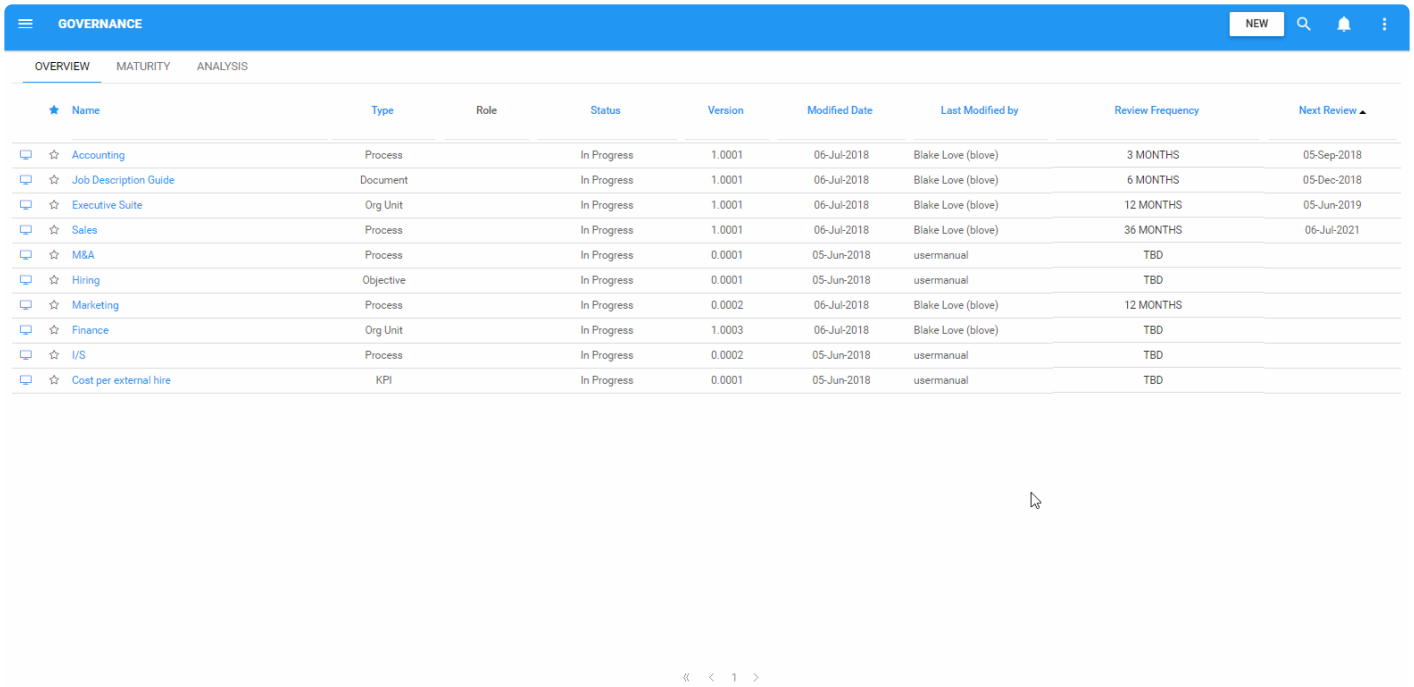
Review Date **=** Publish Date **+** Length of Review Frequency

Edit the Review Frequency

1. Access the Governance Overview Tab
2. Find the object for which you wish to add a Review Frequency
    a. You can use Sorting and Filtering to help you isolate the object
3. You can select a Review Frequency by hovering your cursor in the review frequency cell of the object and clicking within
    a. If the object has already been published, the Review Date will be calculated and displayed in the Next Review column.
    b. If the object has never been published, the Review Date will not be displayed in the Next Review column. It will be generated as soon as the object is published for the first time.

Example

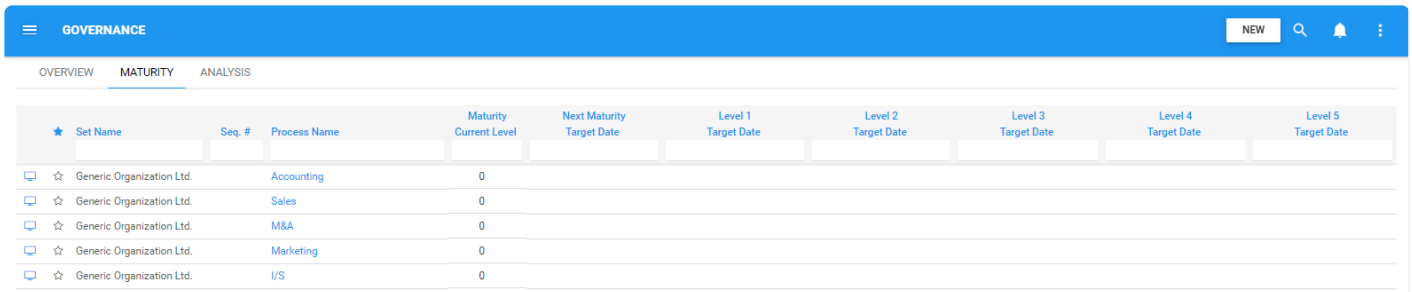
Here, the user filters the Name column with the word **Finance**, then adds a Review Frequency of **3 Months**. Since the object has aleady been published, the system has calculated a date 3 months later than the date of the latest **Published** version.



Name	Type	Role	Status	Version	Modified Date	Last Modified by	Review Frequency	Next Review
Accounting	Process		In Progress	1.0001	06-Jul-2018	Blake Love (blove)	3 MONTHS	05-Sep-2018
Job Description Guide	Document		In Progress	1.0001	06-Jul-2018	Blake Love (blove)	6 MONTHS	05-Dec-2018
Executive Suite	Org Unit		In Progress	1.0001	06-Jul-2018	Blake Love (blove)	12 MONTHS	05-Jun-2019
Sales	Process		In Progress	1.0001	06-Jul-2018	Blake Love (blove)	36 MONTHS	06-Jul-2021
M&A	Process		In Progress	0.0001	05-Jun-2018	usermanual	TBD	
Hiring	Objective		In Progress	0.0001	05-Jun-2018	usermanual	TBD	
Marketing	Process		In Progress	0.0002	06-Jul-2018	Blake Love (blove)	12 MONTHS	
Finance	Org Unit		In Progress	1.0003	06-Jul-2018	Blake Love (blove)	TBD	
I/S	Process		In Progress	0.0002	05-Jun-2018	usermanual	TBD	
Cost per external hire	KPI		In Progress	0.0001	05-Jun-2018	usermanual	TBD	

12.11.2 Maturity Tab

From the Maturity tab of Governance, you can edit and analyze all Process Maturity information.



What EPC objects have Maturity Levels?

All processes and sub processes

Who can edit Maturity information?

You must have EPC Modeler privilege, and have Write permissions on the Process.

What is Process Maturity?

Processes evolve through stages of maturity, where each level is attained by fulfilling a certain set of criteria with regards to its quality of documentation, its ubiquity within the organization, its measures of performance, its level of automation, and its rate of continuous improvement, among other factors specific to industries and organizations.

What Maturity levels are available?

Maturity Levels range from 0 to 5, 0 representing the lowest level of maturity, and 5 representing the highest level of maturity.

What are Maturity Target Dates?

To help track and plan process maturity initiatives you can input a target date where each level of maturity is expected to be achieved for a given process. As the *Current Maturity Level" level increases, the *Next Maturity Target Date" will represent the date where the next Maturity Level is expected to be achieved.

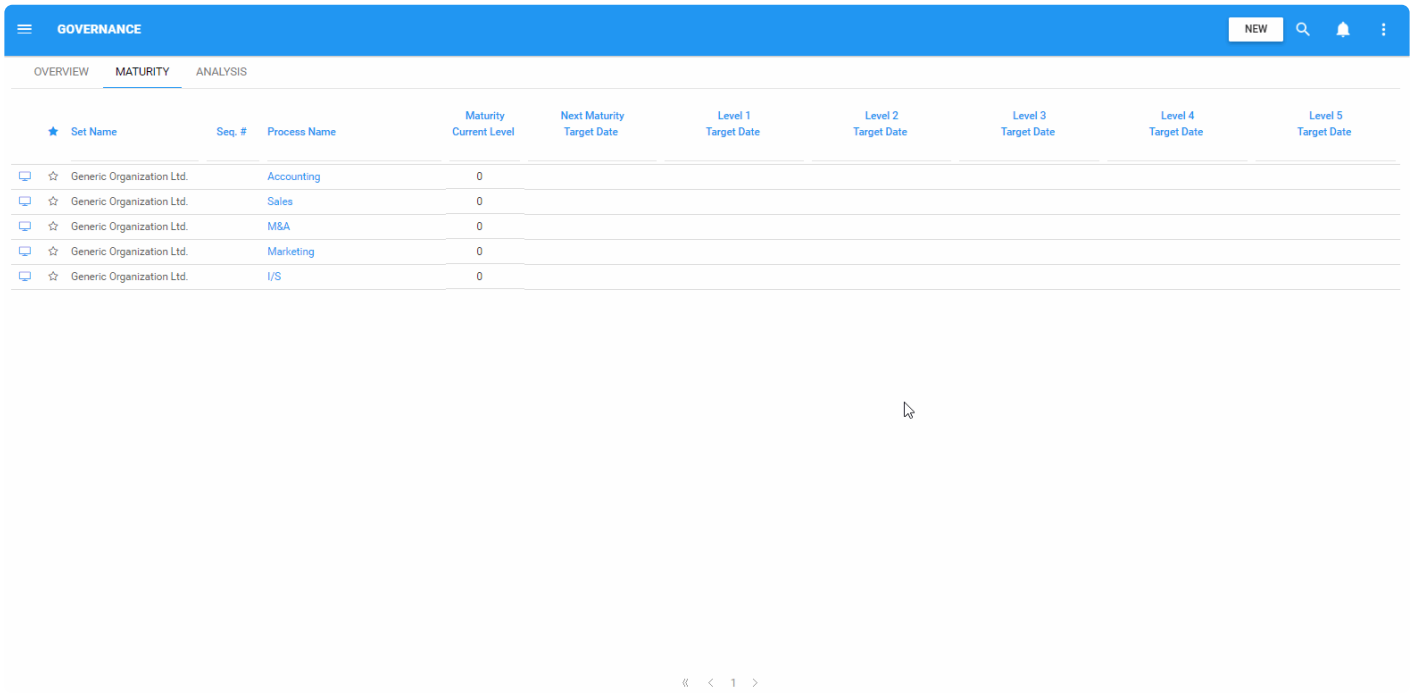
Note
When the **Current Maturity** level reaches 5, the "Next Maturity Target Date" will be blank since there are no more levels to achieve.

Edit Process Maturity

1. Access the Governance Maturity Tab
2. Find the Process for which you wish to edit Maturity information
    a. You can use Sorting and Filtering to help you isolate the object
3. You can edit the following column cells by hovering your cursor in the desired cell and clicking within
    a. Maturity Current Level
    b. Level 1 Target Date
    c. Level 2 Target Date
    d. Level 3 Target Date
    e. Level 4 Target Date
    f. Level 5 Target Date

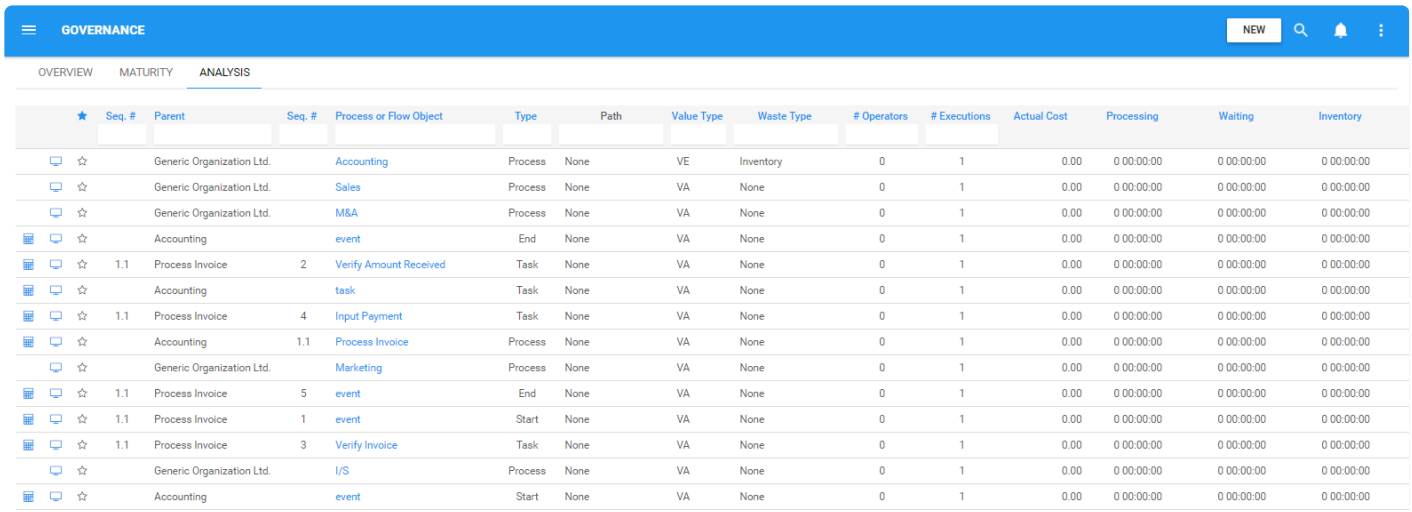
Example

The **Accounting** process has just been created in EPC and therefore has a **Maturity Level** of **0**. The user therefore inputs a **Level 1 Target Date**. Notice that since Current Maturity = 0, the **Next Maturity Target Date** is immediately populated with the same date since Level 1 is the next target. The user will then add Level 2,3,4, and 5 Target Dates, and then incrementally increase the **Current Maturity Level**. Note how the **Next Maturity Target Date" changes as *Current Maturity Level** increases.



12.11.3 Analysis Tab

From the Analysis tab of Governance, you can edit, analyse all Process Analysis information. From here, you can also produce a Process Analysis report dynamically generated from the existing Process Analysis information.



Seq. #	Parent	Seq. #	Process or Flow Object	Type	Path	Value Type	Waste Type	# Operators	# Executions	Actual Cost	Processing	Waiting	Inventory
	Generic Organization Ltd.		Accounting	Process	None	VE	Inventory	0	1	0.00	0 00:00:00	0 00:00:00	0 00:00:00
	Generic Organization Ltd.		Sales	Process	None	VA	None	0	1	0.00	0 00:00:00	0 00:00:00	0 00:00:00
	Generic Organization Ltd.		M&A	Process	None	VA	None	0	1	0.00	0 00:00:00	0 00:00:00	0 00:00:00
	Accounting		event	End	None	VA	None	0	1	0.00	0 00:00:00	0 00:00:00	0 00:00:00
1.1	Process Invoice	2	Verify Amount Received	Task	None	VA	None	0	1	0.00	0 00:00:00	0 00:00:00	0 00:00:00
	Accounting		task	Task	None	VA	None	0	1	0.00	0 00:00:00	0 00:00:00	0 00:00:00
1.1	Process Invoice	4	Input Payment	Task	None	VA	None	0	1	0.00	0 00:00:00	0 00:00:00	0 00:00:00
	Accounting	1.1	Process Invoice	Process	None	VA	None	0	1	0.00	0 00:00:00	0 00:00:00	0 00:00:00
	Generic Organization Ltd.		Marketing	Process	None	VA	None	0	1	0.00	0 00:00:00	0 00:00:00	0 00:00:00
1.1	Process Invoice	5	event	End	None	VA	None	0	1	0.00	0 00:00:00	0 00:00:00	0 00:00:00
1.1	Process Invoice	1	event	Start	None	VA	None	0	1	0.00	0 00:00:00	0 00:00:00	0 00:00:00
1.1	Process Invoice	3	Verify Invoice	Task	None	VA	None	0	1	0.00	0 00:00:00	0 00:00:00	0 00:00:00
	Generic Organization Ltd.		I/S	Process	None	VA	None	0	1	0.00	0 00:00:00	0 00:00:00	0 00:00:00
	Accounting		event	Start	None	VA	None	0	1	0.00	0 00:00:00	0 00:00:00	0 00:00:00

What EPC objects have Process Analysis information?

All Process, Sub Processes, and their Flow Objects

Who can edit Process Analysis information?

You must have EPC Modeler privilege, and have Write permissions on the Process.

What is Process Analysis?

Process analysis involves the measurement of Process activity Costs, Human Resources, Executions, and Durations. Below is a table with the names, descriptions and format/option of each process analysis attribute.

Analysis Attribute	Description	Format / Option
Path	If the process or activity is on the Critical (longest) path **and/or** on the High Risk Path	None, Critical, High-Risk
Value Type	An activity can be either Value-Added (VA), Value Enabling (VE), or Non Value-Added (NVA)	Value-Added (VE) (default), Value Enabling (VE), Non Value-Added (NVA)

Waste Type (available if Value Type = VE or NVA	Indicates what factor is responsible for creating waste	None, Defects, Inventory, Motion, Over Processing, Over Production, Skills, Transport, and Waiting
Number of Operators	The average number of Human Resource Operators execute this process in a given period	Input a whole number
Number of Executions	The average number of executions of this activity are performed in a given period	Input a whole number
Actual Cost	The Actual Cost of executing this process once	Input a dollar amount with up to 2 decimal places
Processing Time	The average duration of time consumed by Processing for the activity	Input a duration in format DDDD HH:MM:SS
Waiting Time	The average duration of time consumed by Waiting during the activity	Input a duration in format DDDD HH:MM:SS
Inventory Time	The average duration of time consumed by Inventory acquisition or stocking during the activity	Input a duration in format DDDD HH:MM:SS
Transport Time	The average duration of time consumed by Transporting objects or people during the activity	Input a duration in format DDDD HH:MM:SS
Change Over Time	The average duration of time consumed by Change Over between operators for the activity	Input a duration in format DDDD HH:MM:SS

Edit Process Analysis information

1. Access the Governance Analysis Tab
2. Find the Process or Flow Object for which you wish to edit Process Analysis information
    a. You can use Sorting and Filtering to help you isolate the object
3. You can edit the following column cells by hovering your cursor in the desired cell and clicking within
    a. Path
    b. Value Type
    c. Waste Type
    d. # of Operators
    e. # of Executions
    f. Actual Cost
    g. Average Process Time
    h. Average Waiting Time
    i. Average Inventory Time

j. Average Transport Time
k. Average Inventory Time

Process Analysis Report

The Process Analysis Report is a Microsoft Excel (.xlsx) report dinamically generated based on the Process Analysis data for all Flow Objects within a process. The report produces 3 sheets within the file, one for general analysis, one for the Critical Path, and one for the High Risk Path.

Generate a Process Analysis Report

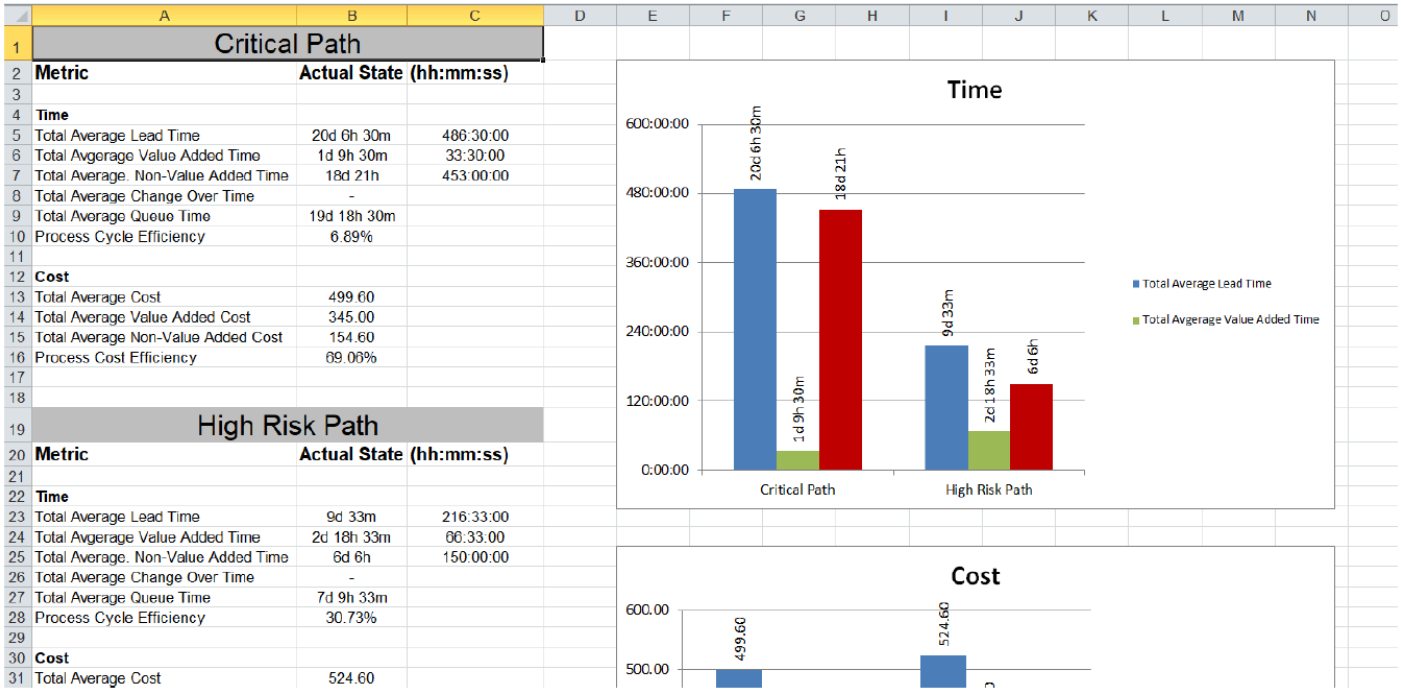
1. Access the Governance Analysis Tab
2. Find the **Parent Process** for which you wish to generate the Process Analysis Report
    a. You can use Sorting and Filtering to help you isolate the object
3. Click on the Calculator Icon to the left of the **Parent Process**
    a. The report will be generated by EPC and downloaded by your internet browser

12.11.3.1 Process Analysis

The Process Analysis Report is a Microsoft Excel (.xlsx) report dynamically generated based on the Process Analysis data for all Flow Objects within a process. The report produces 3 sheets within the file, one for general analysis, one for the Critical Path, and one for the High Risk Path.

Users can:

1. Create a Process Analysis Report featuring information from the specific process
2. Create Customized Process Analysis Report featuring ONLY information from selected flow objects. (Note that to use this feature, users will have to select flow objects in process maps, and generate the report from the process module)



Critical Path		
Metric	**Actual State (hh:mm:ss)**	
Time		
Total Average Lead Time	20d 6h 30m	486:30:00
Total Avgerage Value Added Time	1d 9h 30m	33:30:00
Total Average. Non-Value Added Time	18d 21h	453:00:00
Total Average Change Over Time	-	
Total Average Queue Time	19d 18h 30m	
Process Cycle Efficiency	6.89%	
Cost		
Total Average Cost	499.60	
Total Average Value Added Cost	345.00	
Total Average Non-Value Added Cost	154.60	
Process Cost Efficiency	69.06%	

High Risk Path		
Metric	**Actual State (hh:mm:ss)**	
Time		
Total Average Lead Time	9d 33m	216:33:00
Total Avgerage Value Added Time	2d 18h 33m	66:33:00
Total Average. Non-Value Added Time	6d 6h	150:00:00
Total Average Change Over Time	-	
Total Average Queue Time	7d 9h 33m	
Process Cycle Efficiency	30.73%	
Cost		
Total Average Cost	524.60	

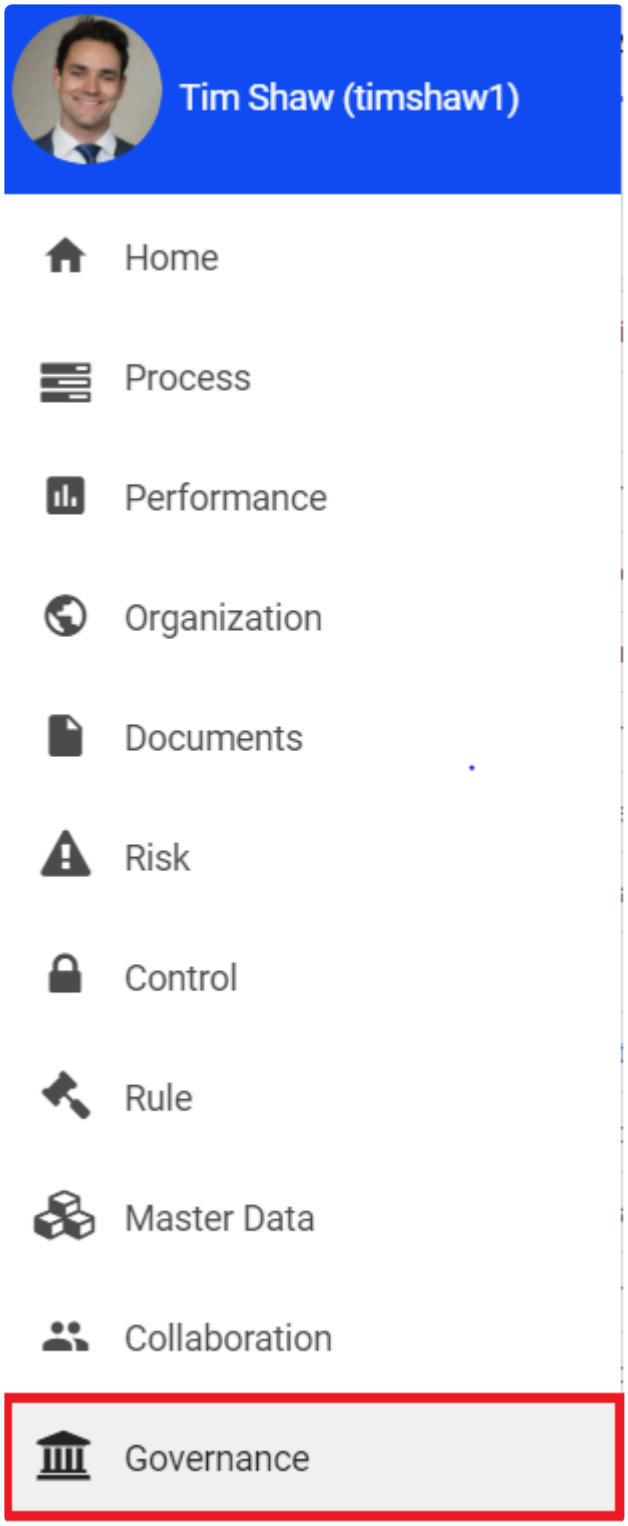
12.11.3.1.1 General Process Analysis Report

Users can generate General Process Analysis Reports, generating an Excel (.xlsx) report with detailed information about Critical Paths, Hight Risk Paths, and detailed timelines.

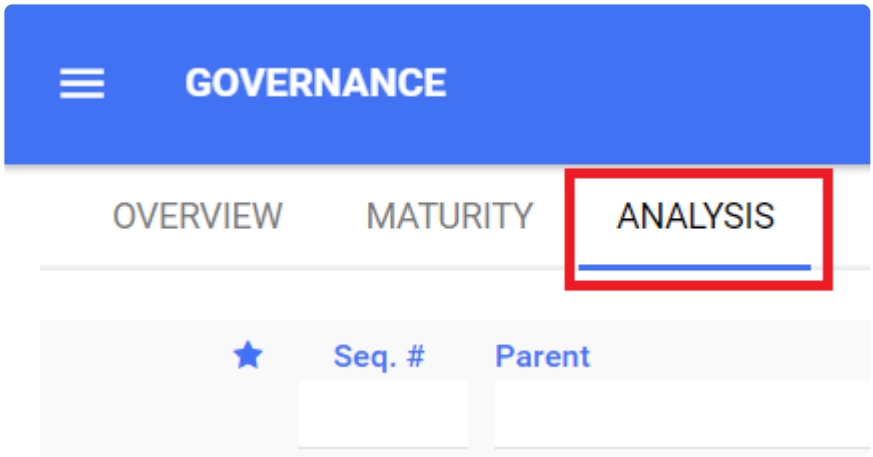
Users have 2 ways of generating these reports:

1 In the Governance Module

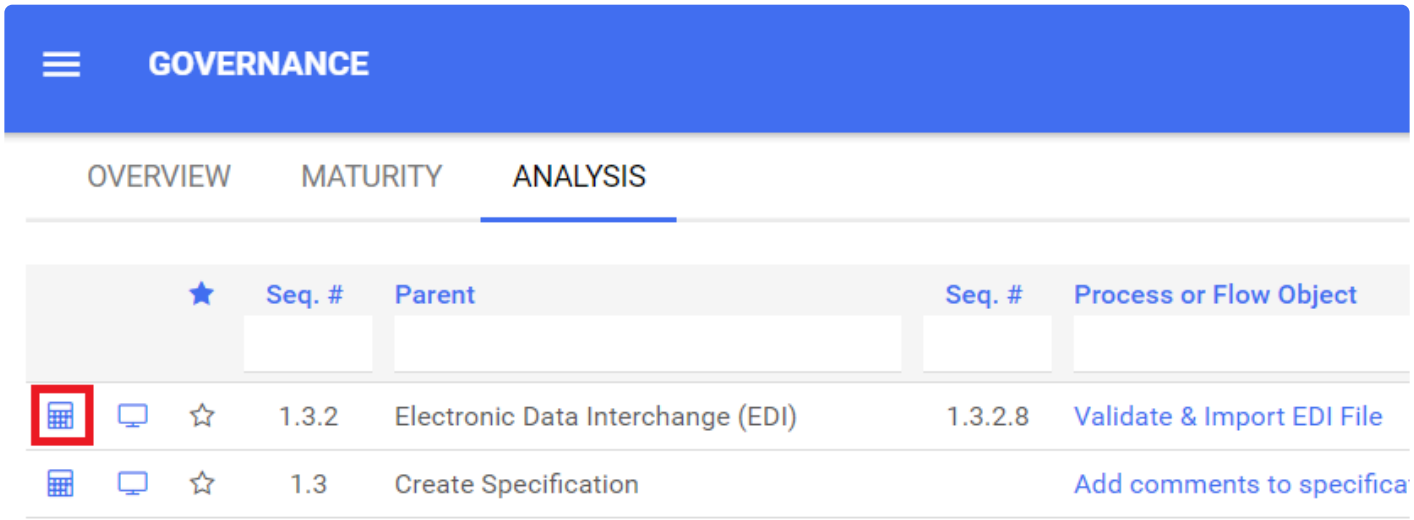
a) Navigate to the Governance Module



b) Select the Analysis Tab



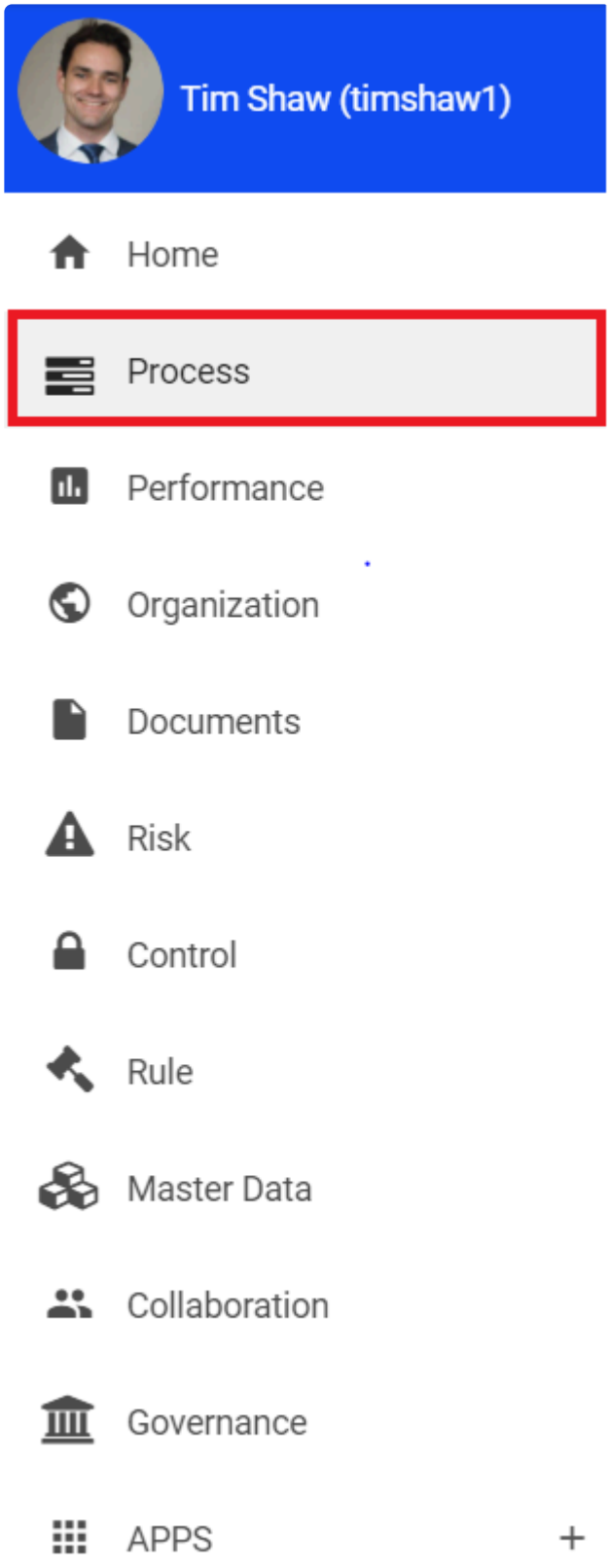
c) Select the Process Analysis Workbook icon



Note that the report generate will contact the process analysis information of all immediate child objects. The report will revolve around the contents of the process.

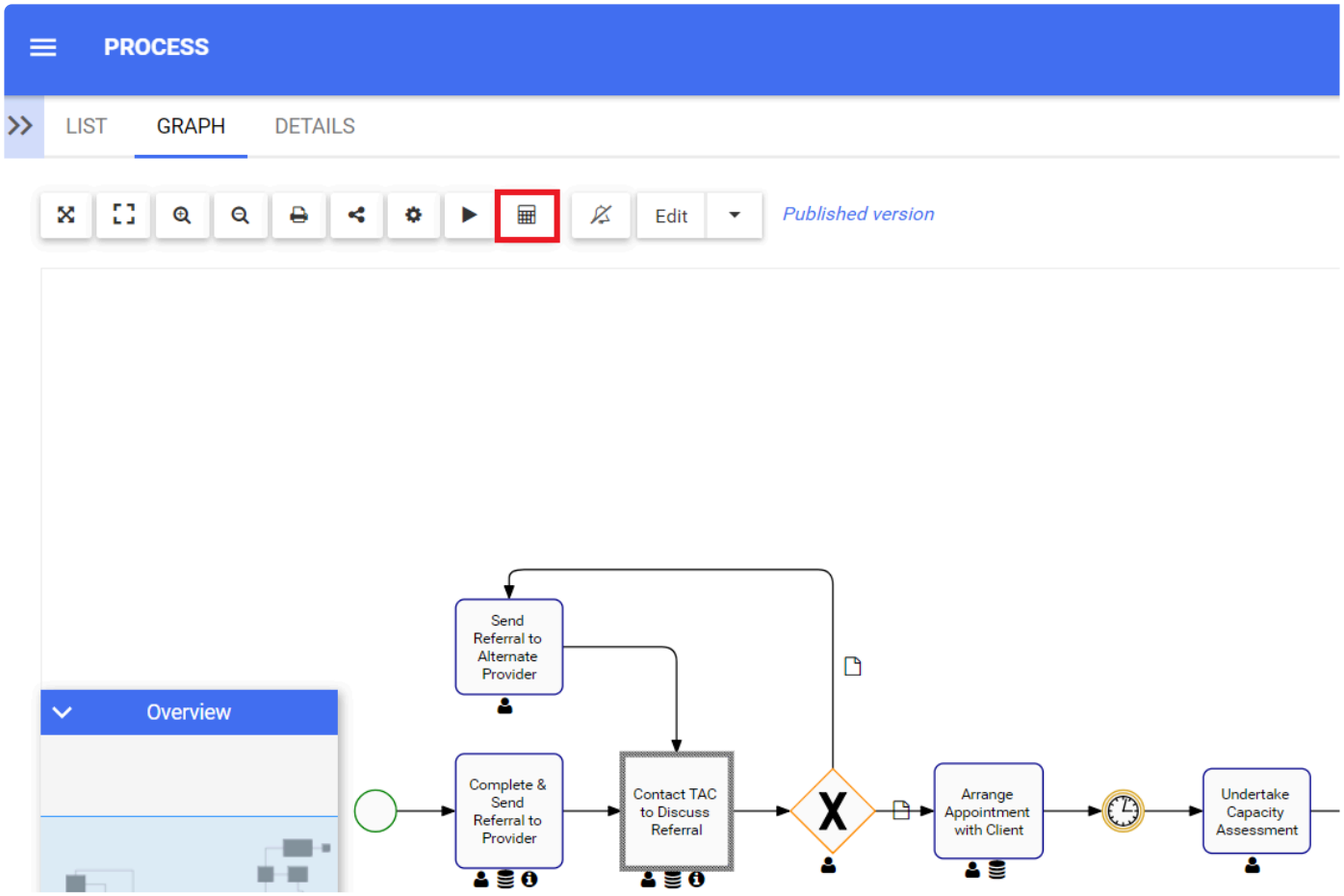
2 In the Process Module

a) Navigate to Process Module



b) Navigate to the Process Page

c) Select the Proces Analysis Icon


PROCESS
LIST
GRAPH
DETAILS
Edit
Published version
Overview
Send Referral to Alternate Provider
Complete & Send Referral to Provider
Contact TAC to Discuss Referral
Arrange Appointment with Client
Undertake Capacity Assessment

12.13 Capability Edit

The Capability Module is a structured viewing model, allowing users to view what the business supports and/or offers and to get better insights.

The Capability Analysis helps users fully understand how to change/improve the business' capabilities and allows users to plan and prioritize their work in the most effective way possible.

Users given the permission to be Web Modelers can create and edit Capability objects directly on the WebApp.

The Capability Edit section will cover the following:

1. Create Capability Objects
2. Edit Capability Objects
3. Delete Capability Objects
4. Publish Capability Objects
5. Capability Objects approval cycle
6. Capability Objects Security

12.13.1 Create Capability Objects

Web Modelers can create new Capability Objects on the Web App. These objects can be Capability Sets, or Capabilities. Web Modelers can create new capability objects by clicking on the NEW icon or directly through the Details Page of a Capability Set or Object.

This section will cover how to Create Capability Objects on the EPC Web App:

1. Create a Capability set
2. Create a Capability

12.13.1.1 Create Capability Set

Capability Sets are the top level of your Capability hierarchy. Capability Sets contain all Capabilities.

Web Modelers can create new Capability Sets on the WebApp.

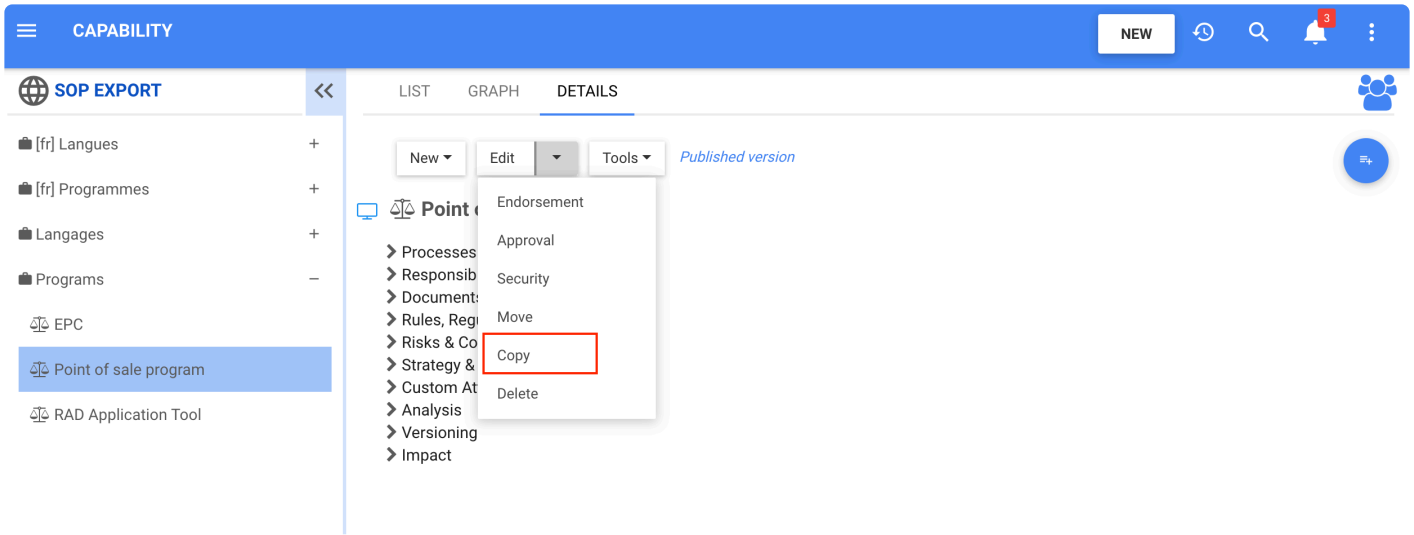
To Create a New Capability Set, please follow the Create Sets instructions.

12.13.2.5 Copy/paste Capability Objects

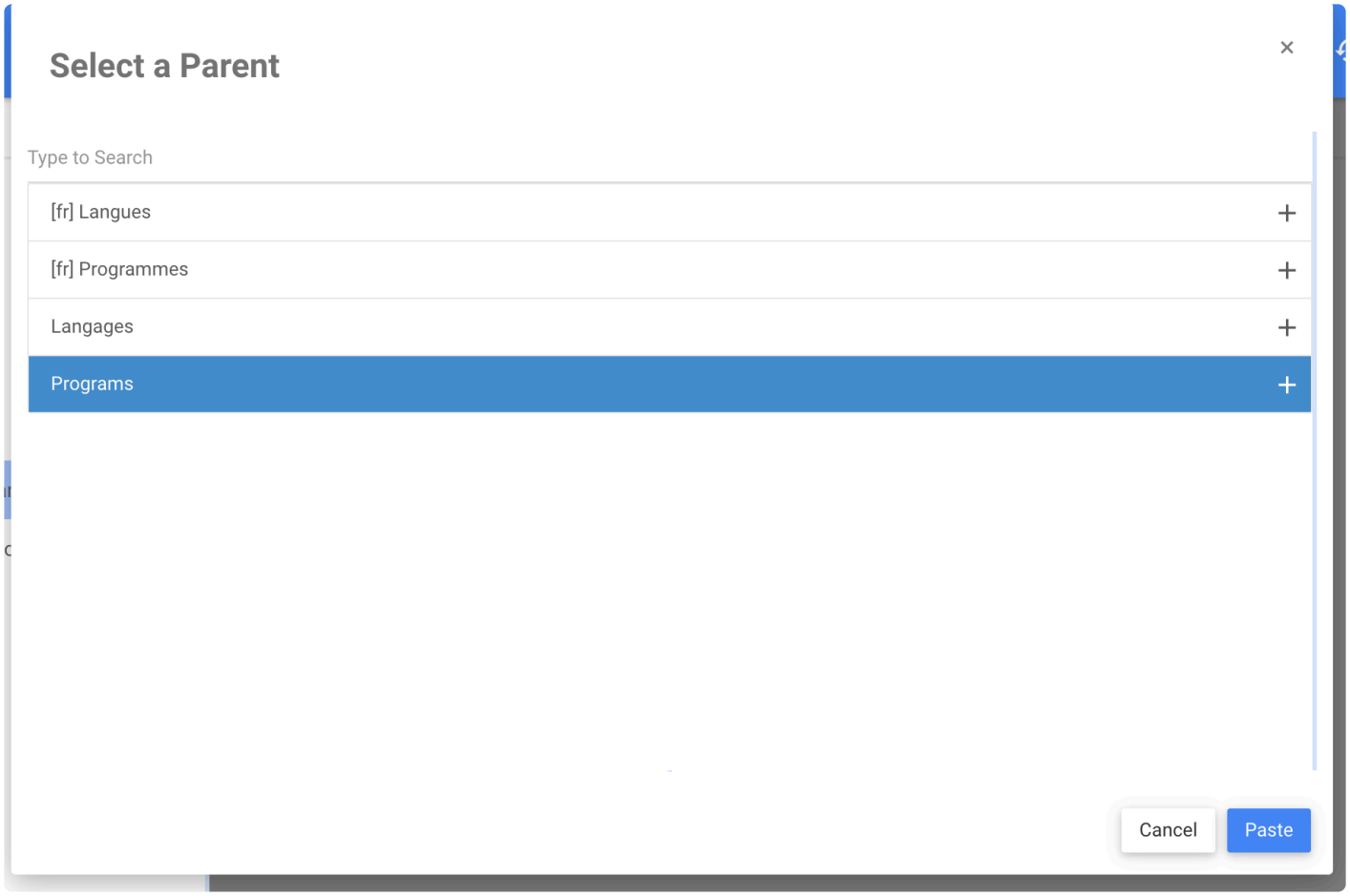
To Copy and paste an object, please see the instructions below:

1. Navigate to the Graph or Details page of the object you wish to copy.

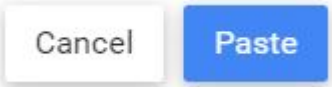
2.Click on the **Edit** dropdown and select the **Copy** option from the dropdown menu.



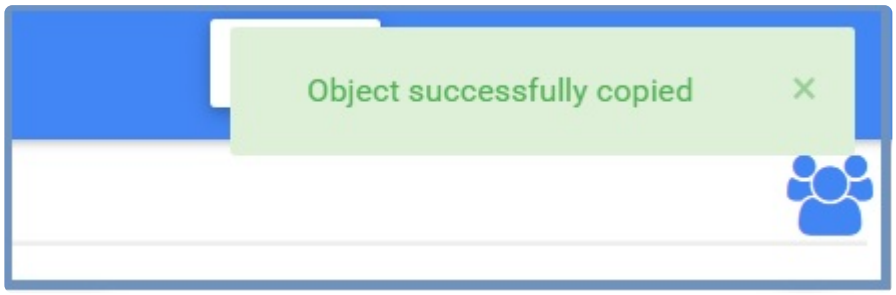
3.Select the logical parent where you wish to Paste the object.



4.Click on the Paste button.



5.You will receive a notification saying the object successfully Copied.



13.0 Parser

The new Parser Application will allow users to upload a document and to break it into EPC objects that are ready to be exported to the EPC WebApp.

The goal is to simplify the conversion from text format to EPC objects and to improve the quality of the exported EPC Objects.

The Parser User Manual will cover the following:

- Upload a document
- Template selection/creation
- Parsing
- Rule Builder
- Export

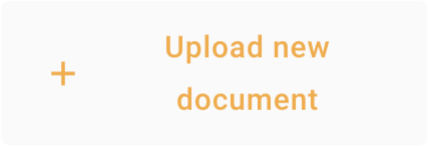
13.1 Upload a document

Document Upload

The first step to be able to use the Parser, is to upload the document that will be parsed and exported to EPC.

How ?

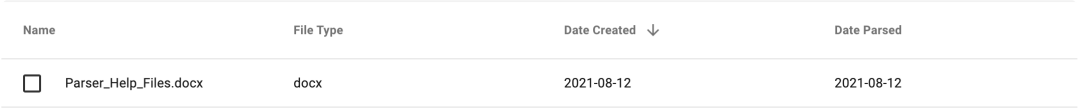
1. To start parsing a document, users have to upload it first. This action is possible by clicking on the “ + Upload new document” button.



After clicking, an upload pop up will appear to select the document to Parse. Only one document at the time can be parsed. Multiple document parsing is not supported yet by the Parser.

> Only Word type documents are supported at the moment.

2. Once the document is uploaded, user will make sure they downloaded the right one, and then select it.



Name	File Type	Date Created	Date Parsed
Parser_Help_Files.docx	docx	2021-08-12	2021-08-12

3. When the document is selected, user will click on the “Next” button to navigate to the following step : Template selection/creation

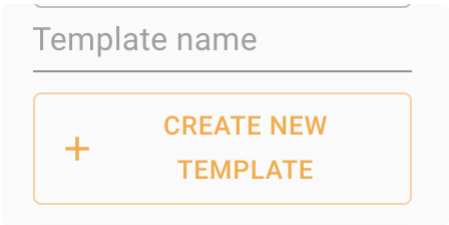
13.2 Template selection/creation

Templates

Users can create their own template based on their document standards with the goal to save time in the future document to parse.

In this second step the user will be asked to select (if existing) a template or to create one if no template is selected.

Creating a template



If users decide to **create a template**, he will be asked to name it to be able to advance to the next step.

The template will be created based on the document tagging.

If user decides to use an **existing template** the template will automatically applied on the following step. The tagging will be based on the previously created template.

Delete a template

In this step users can find any template that is saved in the environment. Users can also delete a template if needed by clicking “Delete Template”

13.3 Parsing

Parsing a document

After selecting a document and template, users will be redirected to the Parsing page.

Users who selected to create a new template will have to start tagging the document from the start.

Users with an existing template will see it applied to the document and can still make edits if needed before the export.

These are the main possible actions while parsing a document :

- Manual Tagging
- Auto Tagging
- Rule Selection
- Parsing Feature

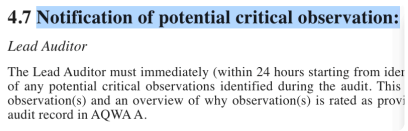
13.3.1 Manual Tagging

Tagging Data

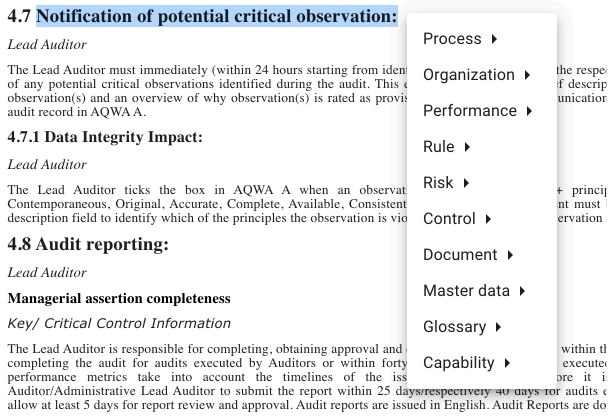
The manual tagging is an important step while creating or editing a template : it will define how the objects will be treated in the next parsing while using the newly crafted template.

To tag the document

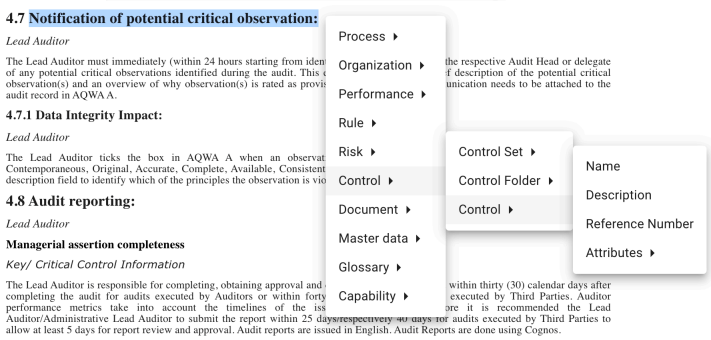
1. Select the text that needs to be tagged



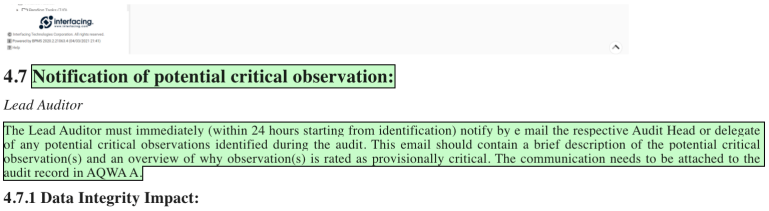
2. Once selected, a contextual menu will appear on the screen



3. Select the the type and level of the object tagging



Tagged objects


4.7 Notification of potential critical observation:

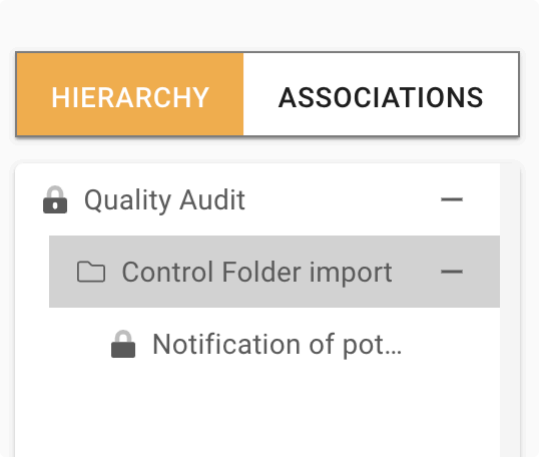
Lead Auditor

The Lead Auditor must immediately (within 24 hours starting from identification) notify by e mail the respective Audit Head or delegate of any potential critical observations identified during the audit. This email should contain a brief description of the potential critical observation(s) and an overview of why observation(s) is rated as provisionally critical. The communication needs to be attached to the audit record in AQWA A.

4.7.1 Data Integrity Impact:

> ! When creating a new template, it's important to tag correctly the first document. The template creation and tagging might take some time depending on the complexity of the document – this steps will define the accuracy of the template for future parsings.

Parser will automatically link the objects from the same type. The hierarchy and associations can be validated as the tagging is being made, on the left of the screen.



> * If user doesn't select a set name, a default object set will be created for the child object that had been tagged

4. Table tagging

When user need to tag a table in the Parser. Two options are available:

+ ription	Assigned Roles & Document Reference
6.4.1 Review and comment start review process in LifeDoc in case of ADVANCE review for correctness and feasibility check stop review workflow in LifeDoc	PM GSOP 103
6.4.2 Evaluate comments out of review evaluate comments out of review according to regulatory requirements, operational feasibility, aspect of standardization, timelines of revision incorporate results from evaluation into the document send document to BO for finalization **Remarks** if necessary, the PM contacts the DT for final evaluation of comments	PM DT
6.4.3 Finalize document check the document for completeness and consistency prepare document for approval design BPM flows according to final document draft	BO

By clicking on on the “ + “ two options will appear

Description	Assigned Roles & Document Reference
6.4. Select header ▸ Entire table nt n LifeDoc in case of ADVANCE review for bility check in LifeDoc	PM GSOP 103
6.4.2 Evaluate comments out of review evaluate comments out of review according to regulatory requirements, operational feasibility, aspect of standardization, timelines of revision incorporate results from evaluation into the document send document to BO for finalization **Remarks** if necessary, the PM contacts the DT for final evaluation of comments	PM DT
6.4.3 Finalize document check the document for completeness and consistency prepare document for approval design BPM flows according to final document draft	BO

- Entire Table : will allow user to tag the whole table as an object that can be found later in rich text in EPC data

Description	Assigned Roles & Document Reference
6.4.1 Review and comment start review process in LifeDoc in case of ADVANCE review for correctness and feasibility check stop review workflow in LifeDoc	PM GSOP 103
6.4.2 Evaluate comments out of review evaluate comments out of review according to regulatory requirements, operational feasibility, aspect of standardization, timelines of revision incorporate results from evaluation into the document send document to BO for finalization **Remarks** if necessary, the PM contacts the DT for final evaluation of comments	PM DT
6.4.3 Finalize document check the document for completeness and consistency prepare document for approval design BPM flows according to final document draft	BO

- Select header : will allow the user to define what type of header is the table “ Columns header or Rows Header”.

Description	Assigned Roles & Document Reference
6.4.1 Review and comment start review process in LifeDoc in case of ADVANCE review for correctness and feasibility check stop review workflow in LifeDoc	PM GSOP 103
6.4.2 Evaluate comments out of review evaluate comments out of review according to regulatory requirements, operational feasibility, aspect of standardization, timelines of revision incorporate results from evaluation into the document send document to BO for finalization **Remarks** if necessary, the PM contacts the DT for final evaluation of comments	PM DT
6.4.3 Finalize document check the document for completeness and consistency prepare document for approval design BPM flows according to final document draft	BO

Once this first step is done, user will tag cells as individual objects.

Description	Assigned Roles & Document Reference
6.4.1 Review and comment ▯ start review process in LifeDoc in case of ADVANCE review for correctness and feasibility check ▯ stop review workflow in LifeDoc	PM GSOP 103
6.4.2 Evaluate comments out of review ▯ evaluate comments out of review according to regulatory requirements, operational feasibility, aspect of standardization, timelines of revision ▯ incorporate results from evaluation into the document ▯ send document to BO for finalization **Remarks** ▯ if necessary, the PM contacts the DT for final evaluation of comments	PM DT
6.4.3 Finalize document ▯ check the document for completeness and consistency ▯ prepare document for approval ▯ design BPM flows according to final document draft	BO

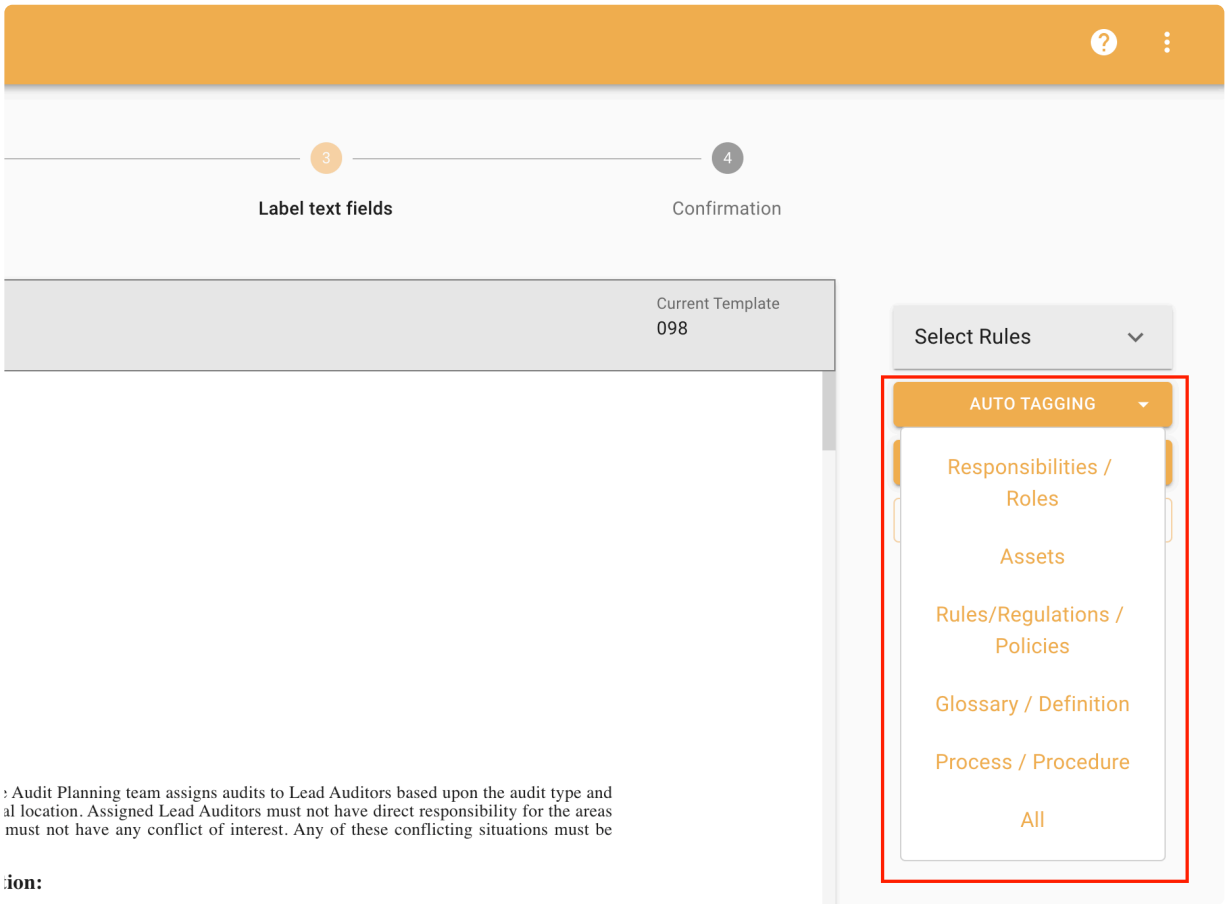
When the table tagging is completed, when parsed, all the tables with the same structure will be tagged accordingly to the initial tagging.

13.3.2 Auto Tagging

Auto Tagging

User can use the Auto Tagging feature where the Parser will automatically identify data to be tagged.

By default, the Parser is able to detect generic Responsibilities, Roles and Assets – if the feature is used without any custom entry

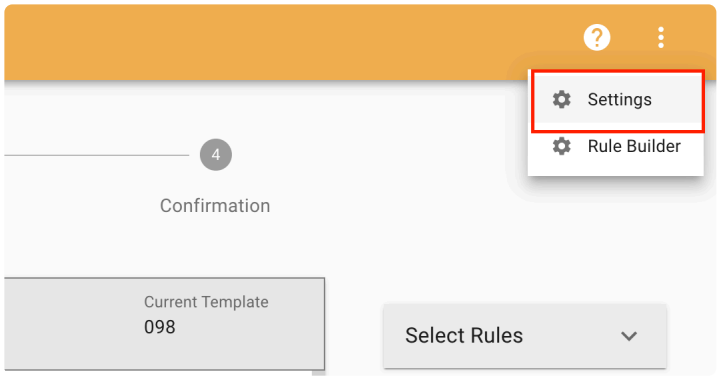


Custom List – Auto Tags

Users can predefine a list of tags that are used in the documents.

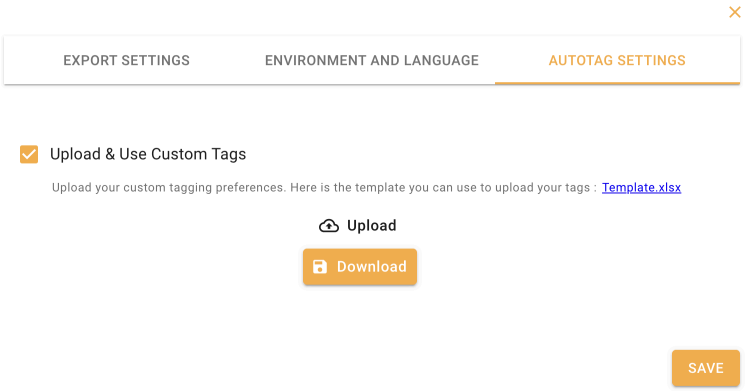
To set up the list of the Auto Tag feature :

1. Go to Settings
On the top right of the screen users can find the settings window



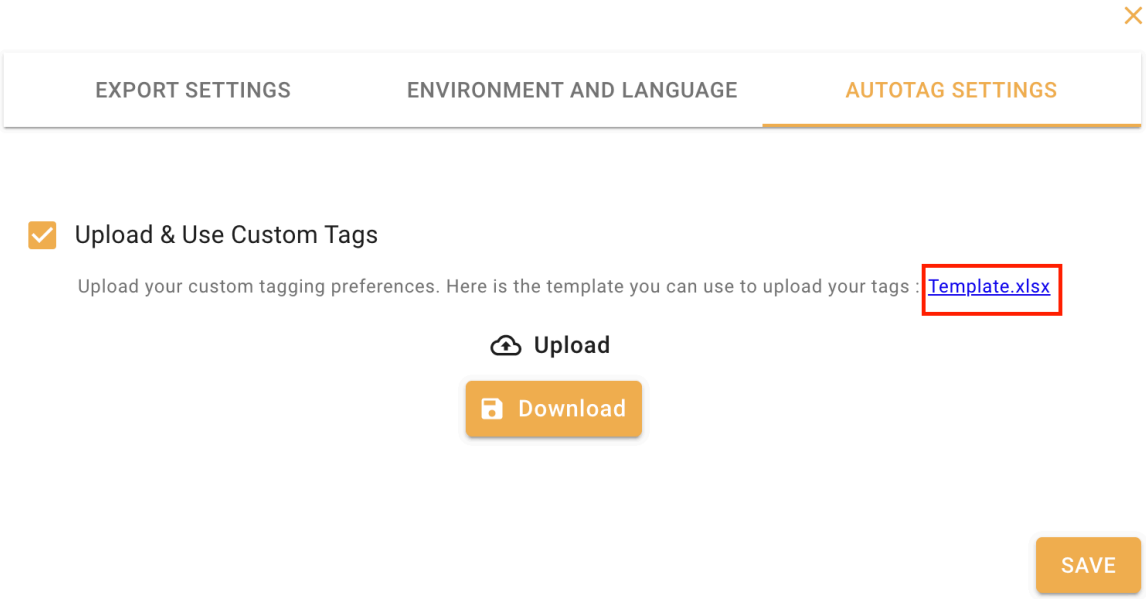
2. Select Auto Tag Settings and check "*Upload & Use Custom Tags*"

When checking the option, the Parser will use the uploaded document with the custom tags for the Auto tags



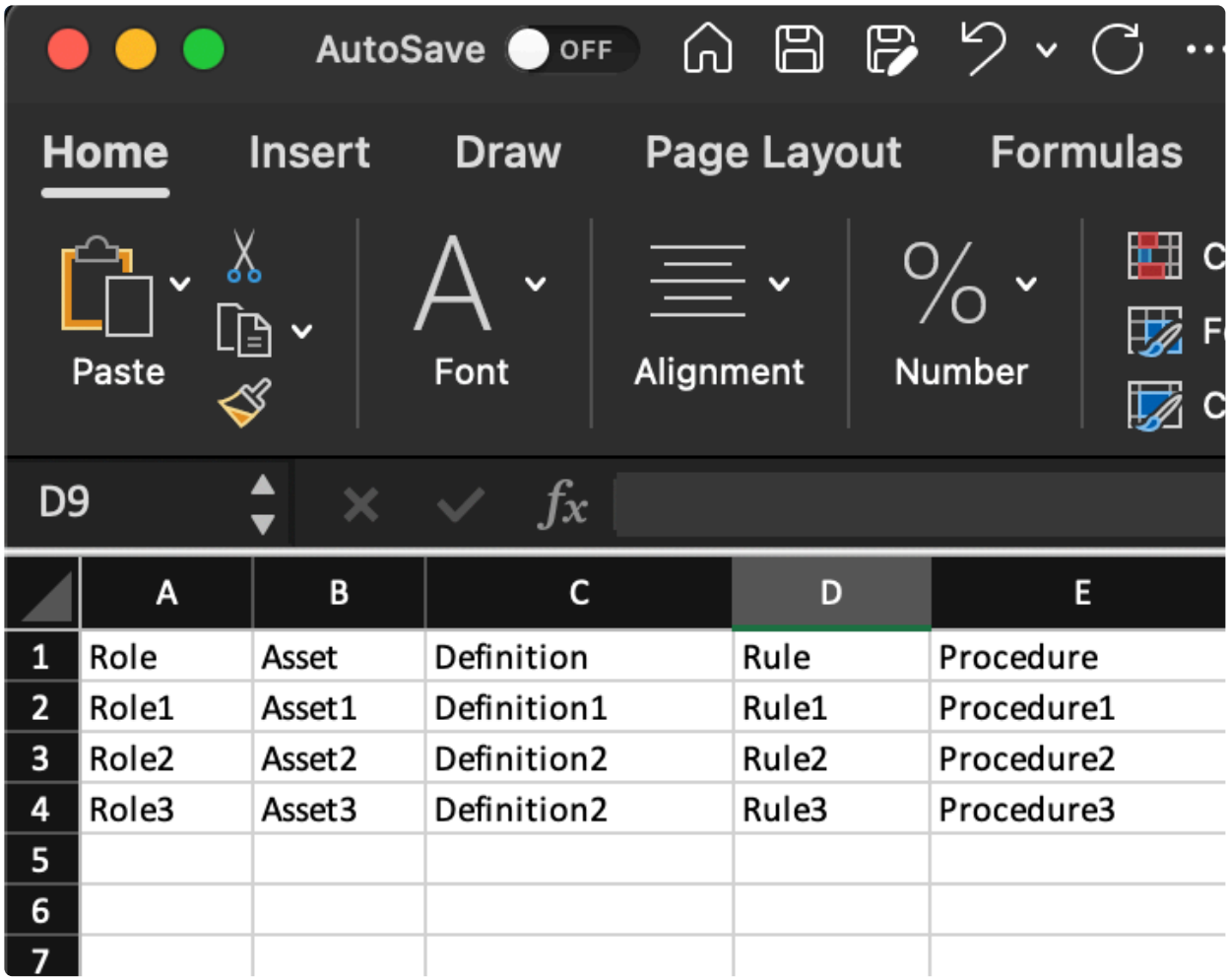
3. Download Auto Tag template

Users have access to a default template and it'S available for download in the pop up as illustrated below.



4. Add the custom tags

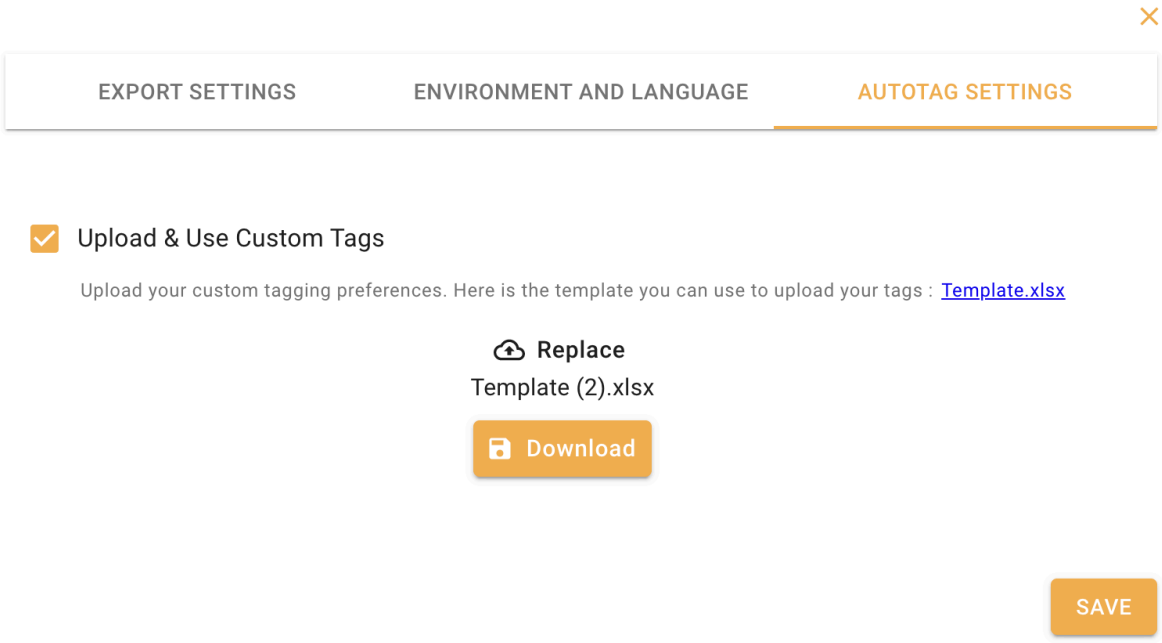
To add the custom tags, users have to list them under the header of each auto tag object type.



	A	B	C	D	E
1	Role	Asset	Definition	Rule	Procedure
2	Role1	Asset1	Definition1	Rule1	Procedure1
3	Role2	Asset2	Definition2	Rule2	Procedure2
4	Role3	Asset3	Definition2	Rule3	Procedure3
5					
6					
7					

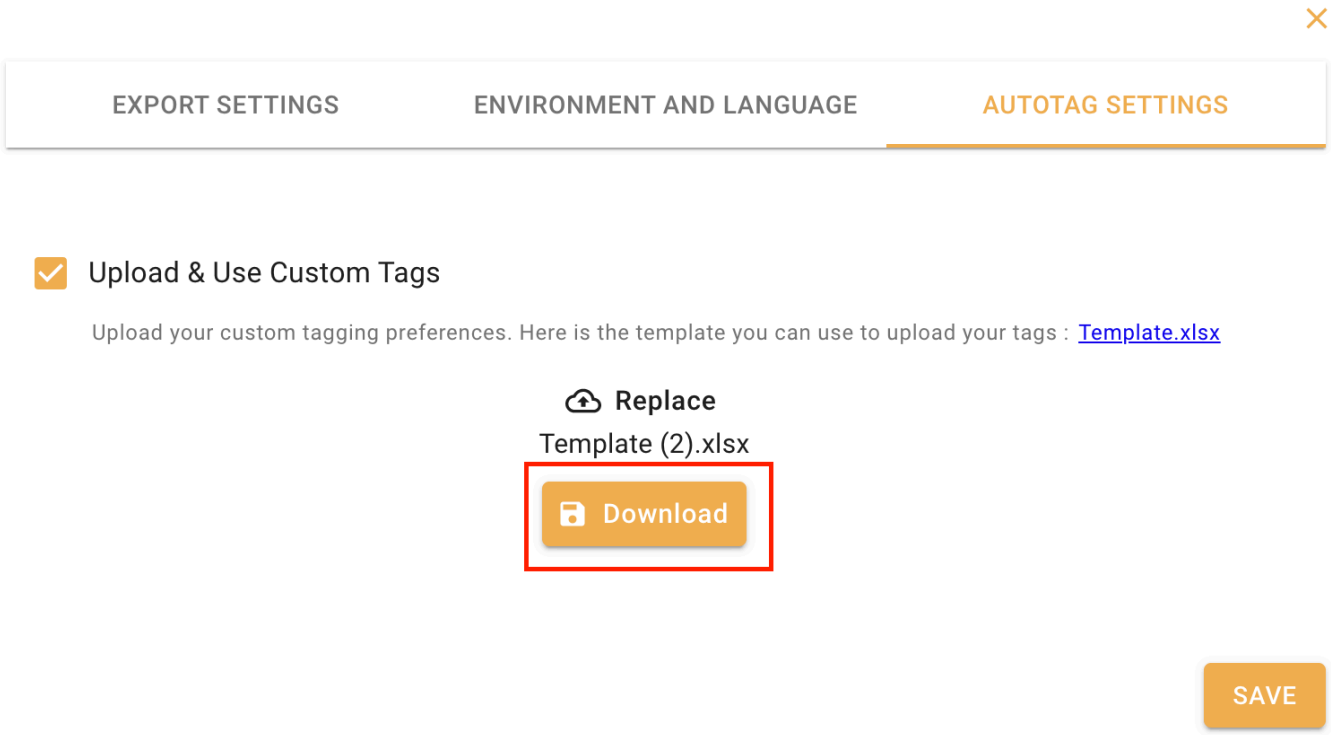
5. Upload the the Custom Tags

When all the custom tags are added, users will upload the new file.



6. Download the custom file to edit/add tags

The custom tags file will always be available for download if users have to edit or adjust their list of tags.

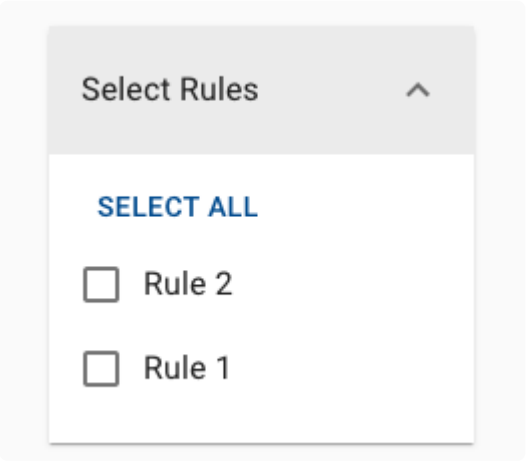


After uploading the custom tags, users can click on the desired type of Auto Tag to see the concerned data converted into EPC objects

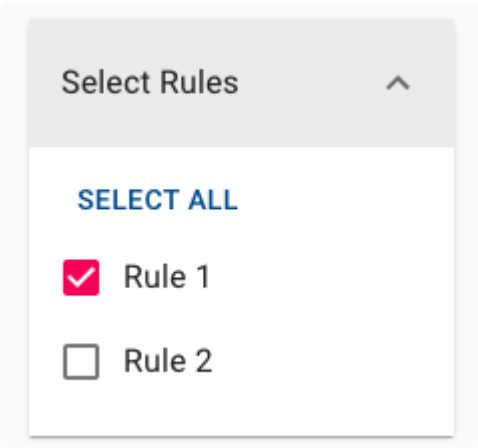
13.3.3 Rule Selection

Select Rules Dropdown

If users previously created Parsing rules, they will be available in this section.



Users will have the possibility to apply them or not, by checking or unchecking each rule.



By checking or unchecking them, users will be able to see in real time how the rule is applied or not to the data.

> We recommend applying the Parsing before the rules to identify the parts of the document that will need to be adjusted by the rules

13.3.4 Parsing Feature

Parsing the document

Once the document is uploaded and the tagging is in progress, user might apply the parsing to retrieve the data in the document.

For a better quality parsing, users should follow this few best practices :

Document original format

The Parser will use the original document formatting as a pattern to be able to process the document data. The result will always be more optimal if the original document has a structured content. A special attention is required for: Information Hierarchy (h1, h2, etc.), lists, bold vs light formats, table structures, etc.

Tagging Hierarchy

When creating a template or tagging a document for the first time, it’s important to think about the data hierarchy.

> We recommend to always try to tag the objects by order of hierarchy. For example, top to bottom tagging : Process Set Name > Process Set Description > Process Name > Process Name Description > Task Name > Task Name Description.

When tagging the document, users should always validate the data on the Hierarchy and Association table on the left of the Screen.

Tagging objects

It’s recommended to tag the integrality of the text as objects. Partially tagged objects might result in errors when the data will be exported.

Example on how to tag the text:

Original text

5 Purpose and Process

5.1 Purpose of Process Management

The purpose of Process Management is to define and continuously improve integrated and effective end-to-end processes and a documentation architecture built on high performing processes in time and quality to ensure compliant processes reflecting the newest stage of regulatory requirements.

In this example, the Sequence numbers were tagged separately and just before the object names. It’s important to tag the whole object description but always avoiding to tag unnecessary spaces.

5 Purpose and Process

5.1 Purpose of Process Management

The purpose of Process Management is to define and continuously improve integrated and effective end-to-end processes and a documentation architecture built on high performing processes in time and quality to ensure compliant processes reflecting the newest stage of regulatory requirements.

The following image represent what a wrong tagging looks like that can result in data errors. In this example, Sequence numbers are merged with object names and unnecessary spacing is tagged at the end of the paragraph.

5 Purpose and Process

5.1 Purpose of Process Management

The purpose of Process Management is to define and continuously improve integrated and effective end-to-end processes and a documentation architecture built on high performing processes in time and quality to ensure compliant processes reflecting the newest stage of regulatory requirements.

Example on how to correctly tag cells in a table for the parsing:

User can only tag the first row of cells

Description	Assigned Roles & Document Reference
6.4.1 Review and comment ▯ start review process in LifeDoc in case of ADVANCE review for correctness and feasibility check ▯ stop review workflow in LifeDoc	PM GSOP 103
6.4.2 Evaluate comments out of review ▯ evaluate comments out of review according to regulatory requirements, operational feasibility, aspect of standardization, timelines of revision ▯ incorporate results from evaluation into the document ▯ send document to BO for finalization **Remarks** ▯ if necessary, the PM contacts the DT for final evaluation of comments	PM DT
6.4.3 Finalize document ▯ check the document for completeness and consistency ▯ prepare document for approval ▯ design BPM flows according to final document draft	BO

After clicking on Parse, all tables with the same structure will be tagged accordingly to what was indicated in the first row

Description	Assigned Roles & Document Reference
6.4.1 Review and comment ▯ start review process in LifeDoc in case of ADVANCE review for correctness and feasibility check ▯ stop review workflow in LifeDoc	PM GSOP 103
6.4.2 Evaluate comments out of review ▯ evaluate comments out of review according to regulatory requirements, operational feasibility, aspect of standardization, timelines of revision ▯ incorporate results from evaluation into the document ▯ send document to BO for finalization **Remarks** ▯ if necessary, the PM contacts the DT for final evaluation of comments	PM DT
6.4.3 Finalize document ▯ check the document for completeness and consistency ▯ prepare document for approval ▯ design BPM flows according to final document draft	BO

6.5 Approve Document

Description	Assigned Roles & Document Reference
6.5.1 Approve content ▯ prepare the document for GMP/GDP – Decision Board **Remark:** ▯ in case of monodivisional document: start the approval workflow directly to Head of divisional QA without presentation to GMP/GDP Decision Board. GMP/GDP Decision Board is informed about approved monodivisional documents afterwards by the QARP	PM, BO, QARP
6.5.2 Approve or reject document ▯ approve content of document by GMP/GDP Decision Board ▯ approve process flows in myBPM by GPO	GMP/GDP – Decision Board GPO (PM)

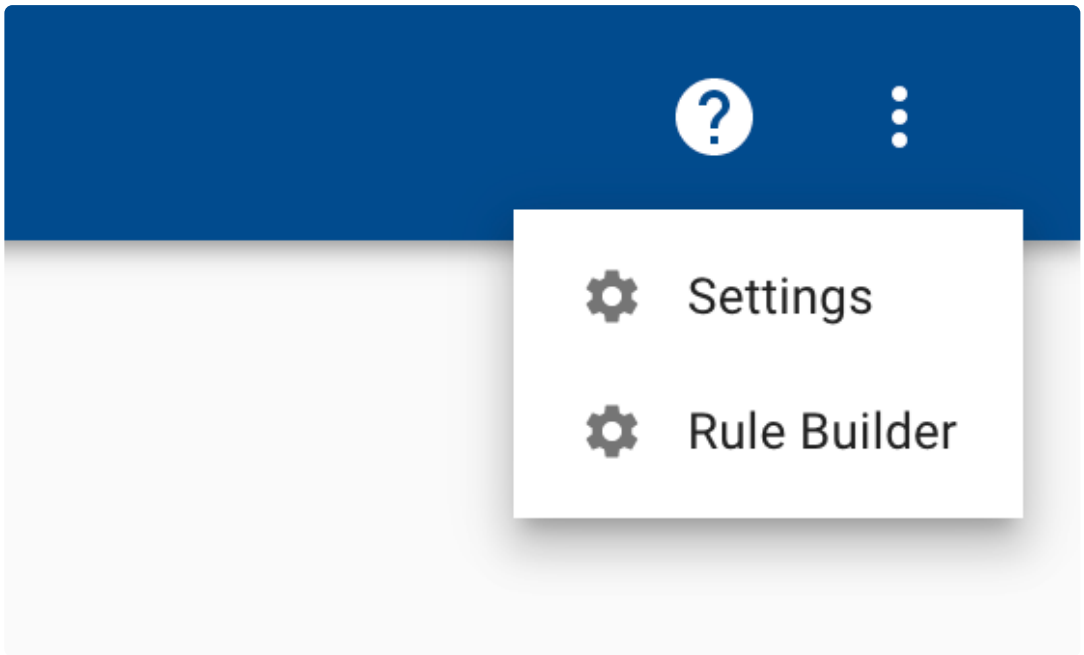
13.4 Rule Builder

Introduction to the Rule builder

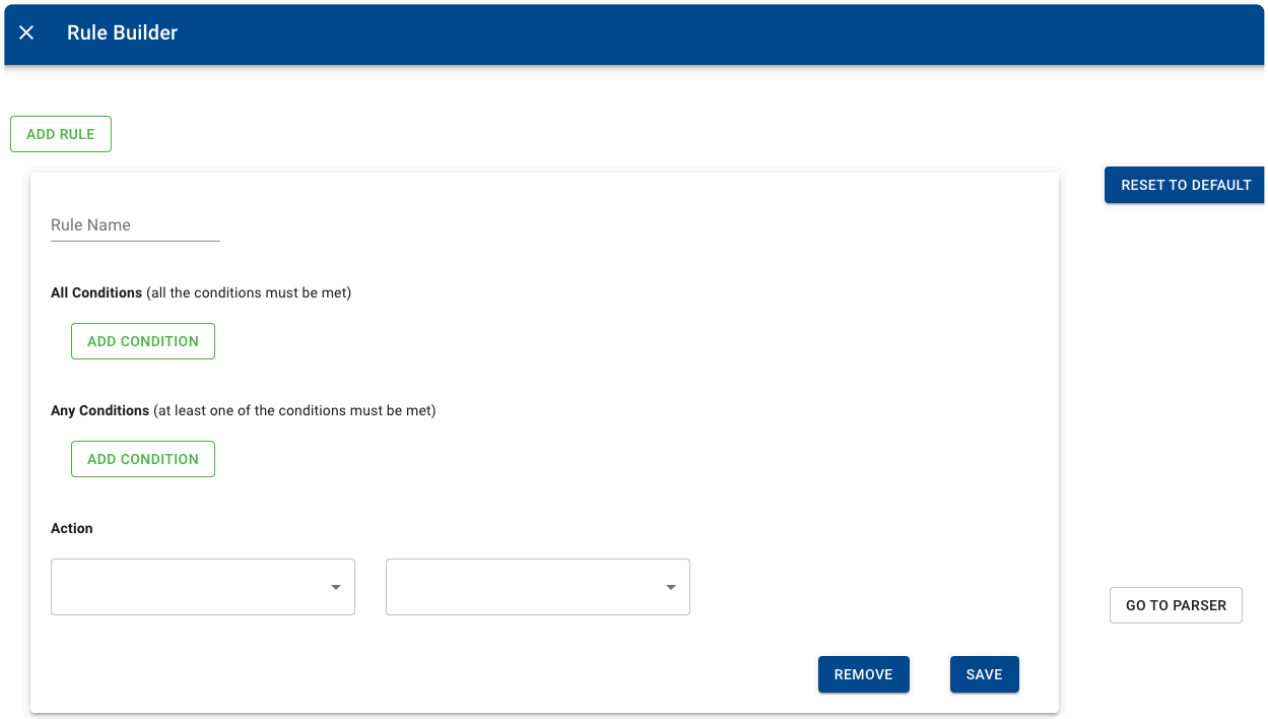
In this advanced section of the Parser, user will be able to create rules that can improve the quality of the parsing. These rules are helpful for different cases. For example : when the original document is not formatted correctly, when users want to mass replace objects that are already tagged, ignore some specific tags, etc.

To access the Rule builder

Users will click on the three dotted menu on the top right corner of the screen and then click on “Rule Builder”



The user will be taken to the Rule Builder :



Add New Rule

By clicking “Add Rule” users will be able to add another set of rules that they can apply to the parsing. Parser will apply the rules one by one, in the order of creation.

Rule Name

This field will let user to name each rule. This will help differentiate the in the parsing screen, where users can check or uncheck them so the can be applied to the text.

All Conditions

This section will allow the users to be able to to create a set of rules/conditions : All conditions must be met, to be able to apply the rule and the action.

Any Conditions

This section will allow the users to create rules/conditions : At least one of the conditions is met to apply the action.

Actions

Actions available :

Action	Definition
Tag as	This action triggers a new field to let the user to choose an EPC Object that will replace the object previously selected in the conditions

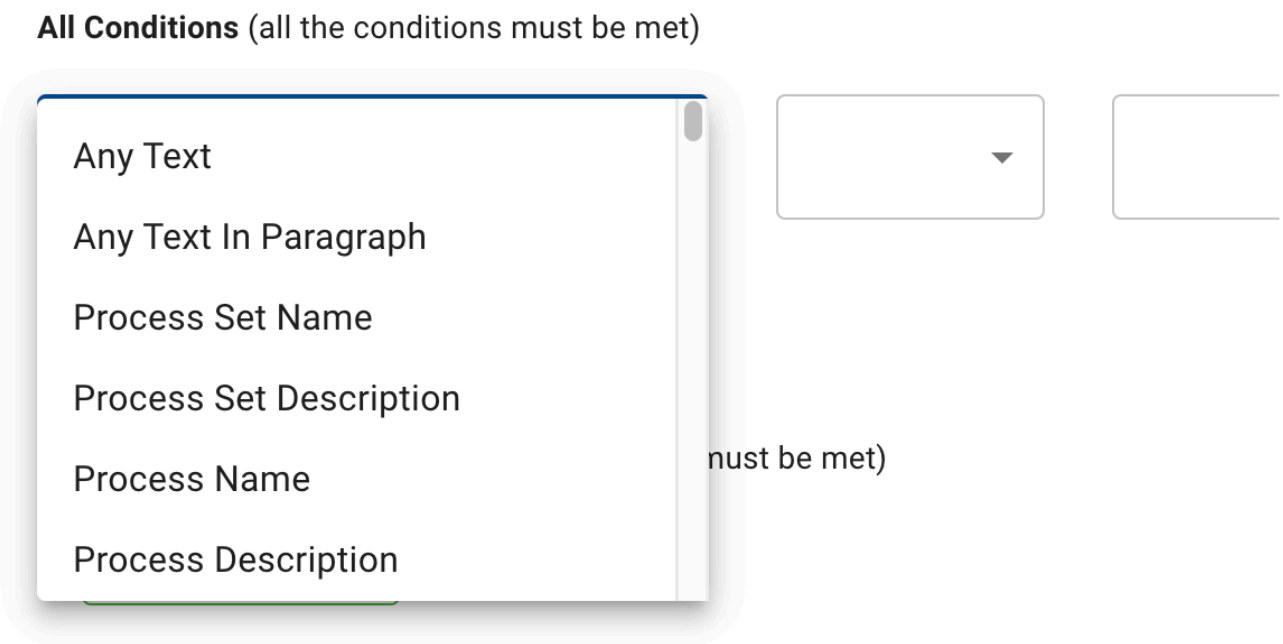
Ignore Tag	This action doesn't need to open the second field and it will just ignore the tag of the selected object
Ignore in Export	This action doesn't need to open the second field and the tag will remain in the Parser but it will be ignored in the export

Remove & Save

- Remove : Will delete the rule
- Save : Saves the rule

Building a rule

First field will contain the following:

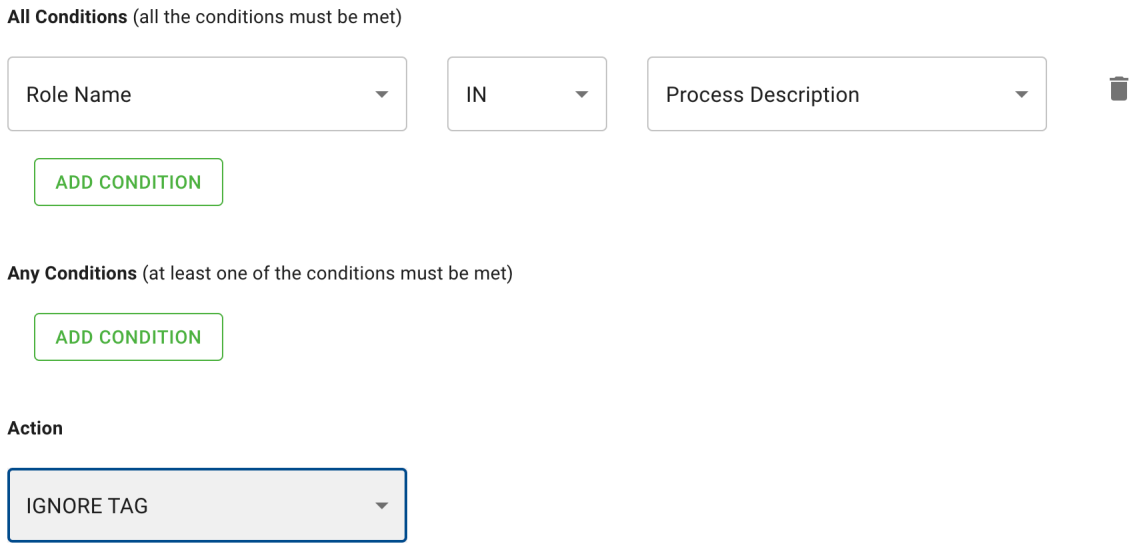


Objects: All first and second level objects that are available in EPC
Any text: Refers to any text without considering the formatting or the paragraphs. This is mostly used when users need to specify sections in the text where the rule will be apllied

Second field will contain the condition itself:

– IN: This condition will mostly be used in a scenario where users want to target specific Object Names IN (or inside) Object Description.

A common scenario can be while using the auto tag option. In this case we can find a situation where users want to ignore some of the tags for various reasons. An example of rule for this scenario can be :



– BEFORE: This condition will be useful to users that need to target specific parts of the document using an object or an element as a point of reference.

This rule can be used combining the previous rule illustrated above. Here's an example if user needs ro ignore all Roles Names that are in a Process Description **AND** also, they have to be **before** a Process Goal in the document:

– AFTER: This condition will be useful to users that need to target specific parts of the document that are after an object or an element as a point of reference.

– BETWEEN: This condition works as a combination of BEFORE and AFTER.

Third Field can contain Objects or Custom Text:

Once user set the condition in the second field they can close the rule with an object or with custom text.

The custom text fields can be really useful when users have to target specify start and/or end of points of references in the document.

Here's an example in a document where the users weren't able to table process roles and their description due to the document formatting :

PM	Process Manager
QINT	Quality International

4 Resposibilities and Assigned roles

- Process Manager (PM): responsible to create processes and respective documents according to the defined process lifecycle by drafting, review and attribution of the document.
- External Author (EA): responsible to contribute with content e.g. of monodivisional documents without editor rights in LifeDoc. System Owner of IT-systems also act as EA and are responsible for updating the content of the respective operational manuals.
- Back-Office (BO): responsible to process documents in LifeDoc during the approval and distribution phase of the document including the formal checks of the document.
- Drafting Team (DT): responsible to actively provide input in drafting processes and documents, consisting of members such as Subject Matter Experts (SMEs), Business and System Owner according to CP 2001 in case IT system specific regulations
- Quality Area Responsible Person (QARP): responsible to
  - align with other QMS functions regarding QMS structure and content
  - approve cross divisional Supplements, Change Requests (CRs) and cross divisional Best Practice documents
- GMP/GDP Decision Board (DB): responsible to
  - approve the content of the QMS GMP/GDP processes/documents
  - approve the annual Quality Planning and its revisions/ updates over the year
- Divisional/ Business Unit/ Development Q Heads, Head of PKM, Head of QINT: responsible to approve global documents in LifeDoc
- GPO approves processes in myBPM and ensures alignment between QMS und myBPM process flows

5 Purpose and Process

5.1 Purpose of Process Management

The purpose of Process Management is to define and continuously improve integrated and effective end-to-end processes and a documentation architecture built on high performing processes in time and quality to ensure compliant processes reflecting the newest stage of regulatory requirements.

If user select Process Manager (PM): as a role name and the rest of the paragraph as a role description :

4 Resposibilities and Assigned roles

- Process Manager (PM): responsible to create processes and respective documents according to the defined process lifecycle by drafting, review and attribution of the document.
- External Author (EA): responsible to contribute with content e.g. of monodivisional documents without editor rights in LifeDoc. System Owner of IT-systems also act as EA and are responsible for updating the content of the respective operational manuals.
- Back-Office (BO): responsible to process documents in LifeDoc during the approval and distribution phase of the document including the formal checks of the document.

But if parsed, the current result will be that everything is tagged as a Role name :

Resposibilities and Assigned roles

- Process Manager (PM): responsible to create processes and respective documents according to the defined process lifecycle by drafting, review and attribution of the document.
- External Author (EA): responsible to contribute with content e.g. of monodivisional documents without editor rights in LifeDoc. System Owner of IT-systems also act as EA and are responsible for updating the content of the respective operational manuals.
- Back-Office (BO): responsible to process documents in LifeDoc during the approval and distribution phase of the document including the formal checks of the document.
- Drafting Team (DT): responsible to actively provide input in drafting processes and documents, consisting of members such as Subject Matter Experts (SMEs), Business and System Owner according to CP 2001 in case IT system specific regulations
- Quality Area Responsible Person (QARP): responsible to
  - align with other QMS functions regarding QMS structure and content
  - approve cross divisional Supplements, Change Requests (CRs) and cross divisional Best Practice documents
- GMP/GDP Decision Board (DB): responsible to
  - approve the content of the QMS GMP/GDP processes/documents
  - approve the annual Quality Planning and its revisions/ updates over the year
- Divisional/ Business Unit/ Development Q Heads, Head of PKM, Head of QINT: responsible to approve global documents in LifeDoc
- GPO approves processes in myBPM and ensures alignment between QMS und myBPM process flows

Purpose and Process

Purpose of Process Management

Rule to make the tagging work correctly:

Rule 1

Rule Name
Rule 1

All Conditions (all the conditions must be met)

Any Text	BETWEEN	Custom Text	Custom Text: 4 Responsabilities and
Custom Text: 5 Purpose and Process			
Any Text In Paragraph	BEFORE	Custom Text	Custom Text: :

ADD CONDITION

Any Conditions (at least one of the conditions must be met)

ADD CONDITION

Action

TAG AS	Role Name

Rule 2

Rule Name

Rule 2

All Conditions (all the conditions must be met)

Any Text	BETWEEN	Custom Text	Custom Text: 4 Responsabilities and
Custom Text: 5 Purpose and Process			
Any Text In Paragraph	AFTER	Custom Text	Custom Text: :

ADD CONDITION

Any Conditions (at least one of the conditions must be met)

ADD CONDITION

Action

TAG AS	Role Description

After applying the two rules, this is the correct result :

QINT Quality International

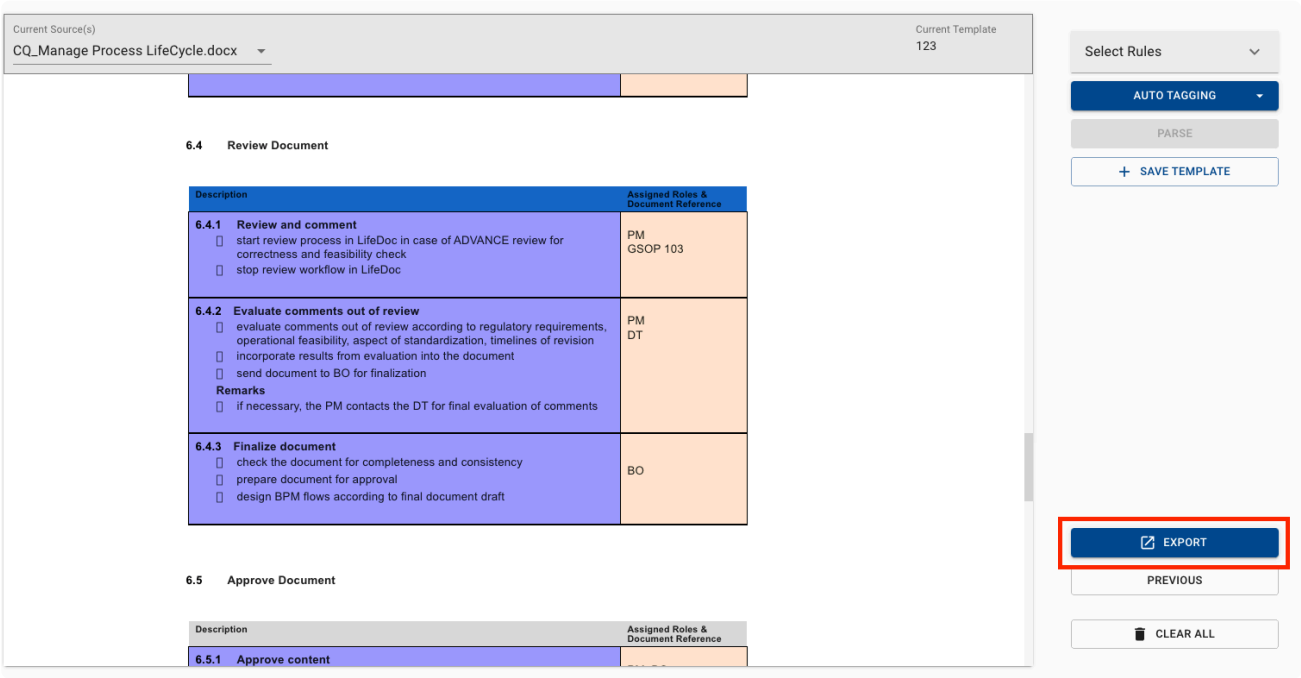
4 Resposibilities and Assigned roles

- Process Manager (PM): responsible to create processes and respective documents according to the defined process lifecycle by drafting, review and attribution of the document.
- External Author (EA): responsible to contribute with content e.g. of monodivisional documents without editor rights in LifeDoc. System Owner of IT-systems also act as EA and are responsible for updating the content of the respective operational manuals.
- Back-Office (BO): responsible to process documents in LifeDoc during the approval and distribution phase of the document including the formal checks of the document.
- Drafting Team (DT): responsible to actively provide input in drafting processes and documents, consisting of members such as Subject Matter Experts (SMEs), Business and System Owner according to CP 2001 in case IT system specific regulations
- Quality Area Responsible Person (QARP):

13.5 Export

Export Data to EPC

To Export the data to EPC, users can click on the Export button. The action is available after the first tag of the document :



The most important part of the Parser is being able to export the date to EPC.

The export feature is simple to use and will give the possibility to the user to have more flexibility on the different export settings based by preferences. Two important aspects to consider for the Export :

1. Export Settings Menu
2. Environment & Language Menu

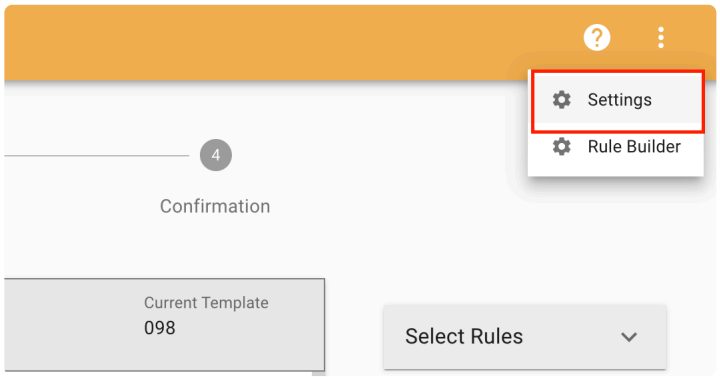
13.5.1 Export Settings

Export settings for Parser

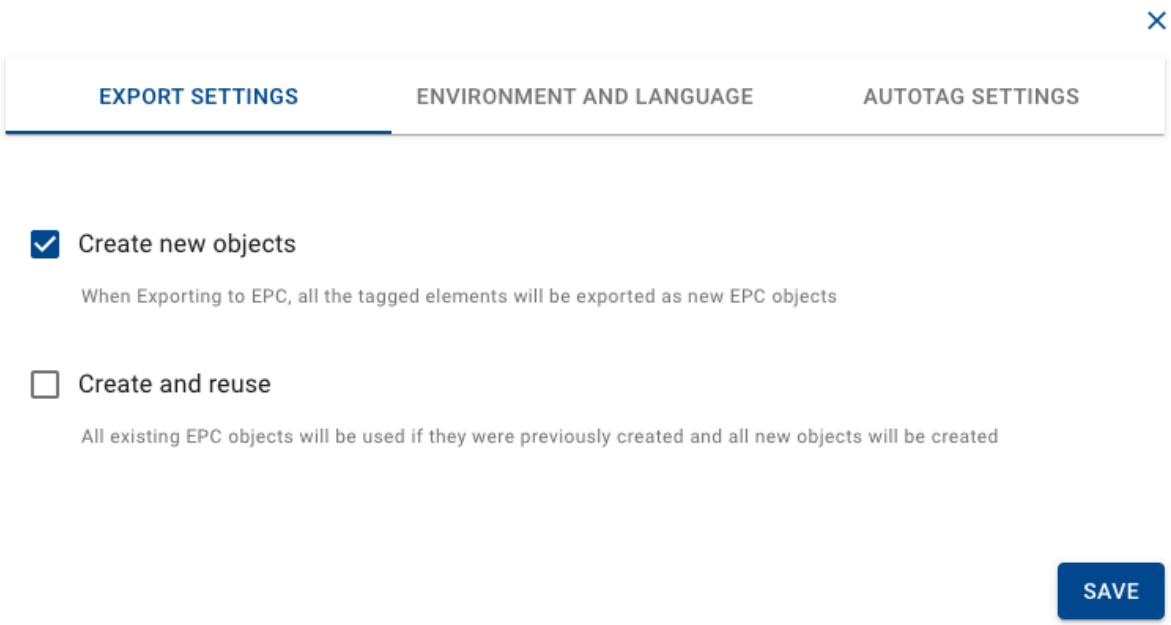
When a document is parsed, and the user is ready to export his data to EPC he needs to be able to choose between 2 options : Create New objects or Create and re-use

To set up the Export :

1. Go to Settings
On the top right of the screen users can find the settings window



2. Find the export tab



The two available options :

- Create new object : When Exporting to EPC, all the tagged elements will be exported as new EPC objects

- Create and Reuse : All existing EPC objects will be used if they were previously created and all new objects will be created

Example of behaviours

Given we tagged the words “Billing Process” As “Process Name” in Parser and we export the Object :

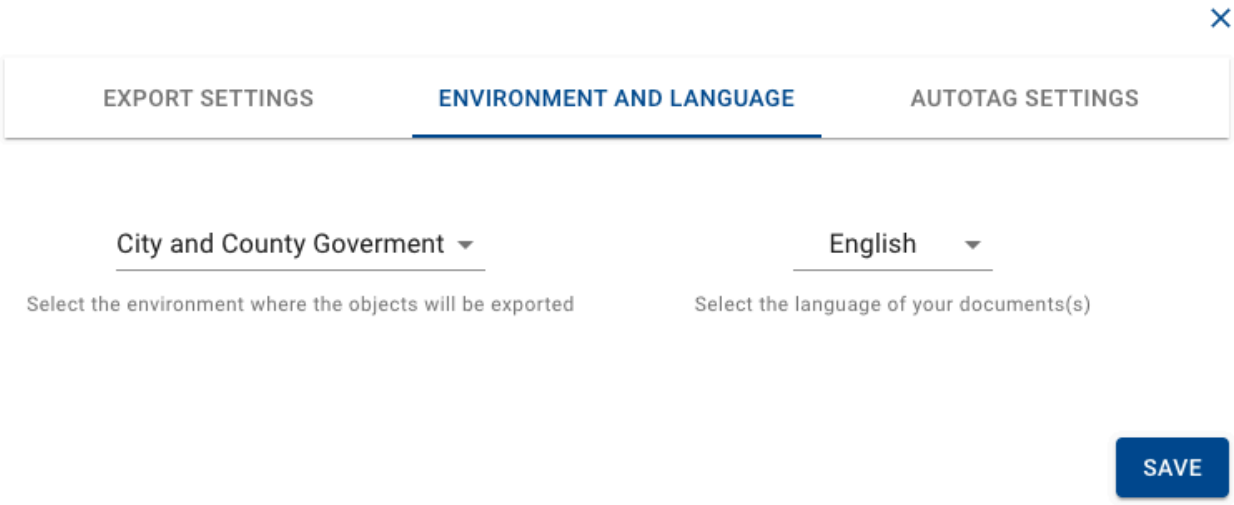
1. IF the object is already existing in EPC (Object_Name= Billing Process AND Object_Type = Process Name) : It will be matched and will not create a new object

2. IF the object doesn’t have a description in EPC. While, in Parser – As a user, I associated a Process Description to the Process Name (Billing Process) : It will update the existing object with the new Description.

13.5.2 Environment & Language

Export settings for Parser

In the settings pop up, the user will find the Environment & Language tab.



- Environment : This dropdown to select the environment where the objects will be exported.

- Language : This dropdown to select the language of destination documents(s).

14.0 Middleware Bi-Directional Integration Sync Manager

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

As of now, EPC supports:

- Atlassian Jira
- Essential Projects

14.1 Atlassian Jira Two-way Integration

Building a bridge between BAs, Dev, QA and UAT with EPC and Atlassian Jira.

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

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

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

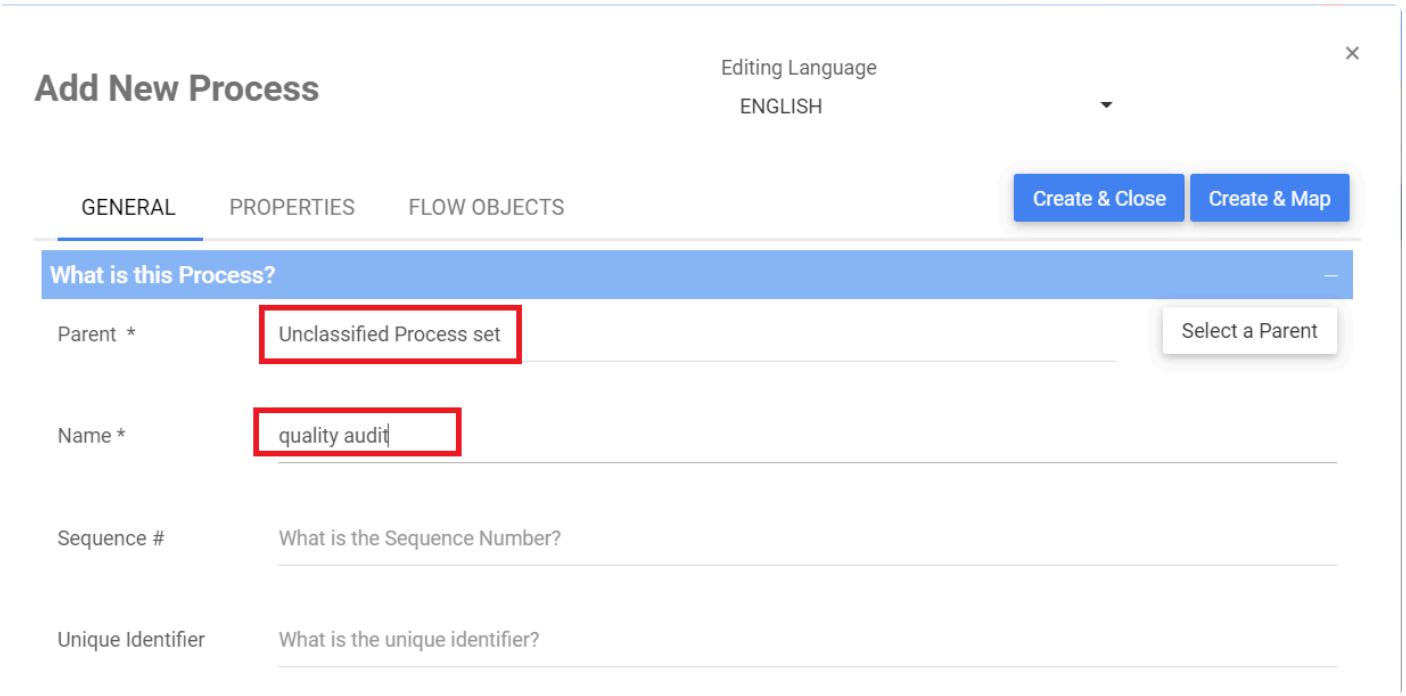
14.1.1 Creating a Jira Epic and Story From EPC

If a user updates a task in Jira (e.g. adding requirements), the information is automatically updated in the corresponding task in EPC. Similarly, when creating a Story in Jira and tagging the Item by EPC, users will find an object created in the document folder. The object will have the Jira link associated as an URL. This is how both systems are able to communicate and ensure the synchronization between business and the development.

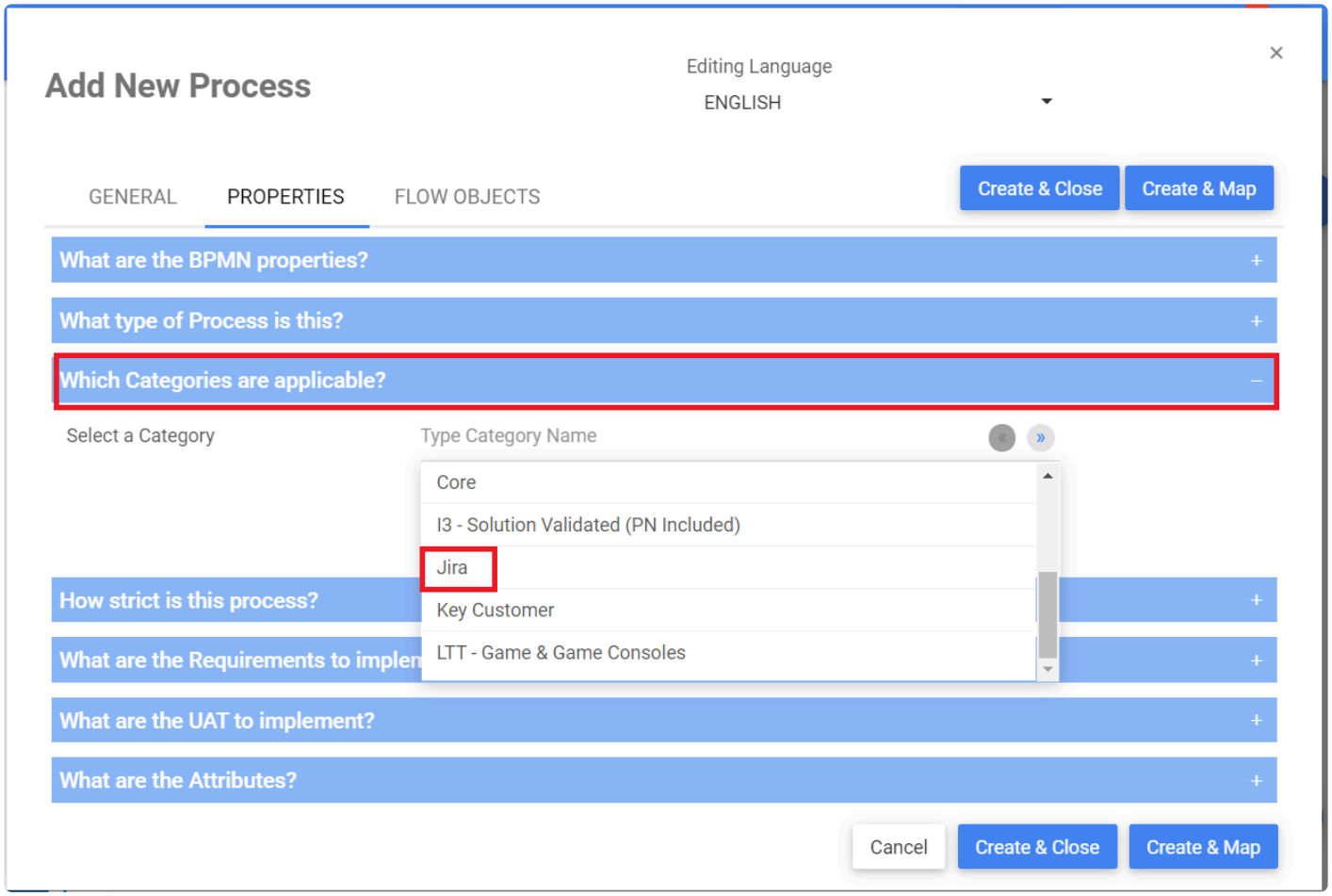
> ! Depending on the version of Jira you are using, some rich text formatting or images may not be supported.

To create a Jira Epic:

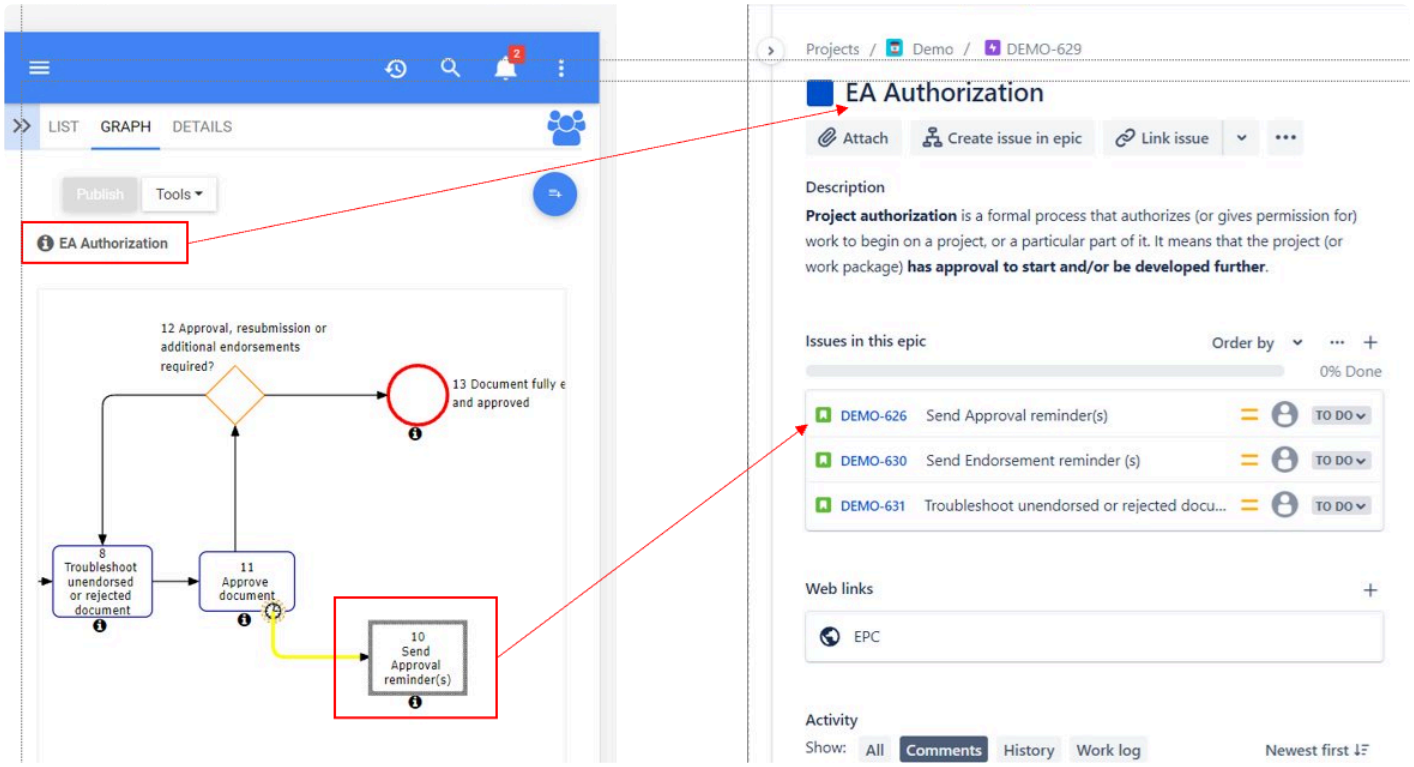
Create a process in EPC and add a name and a description.



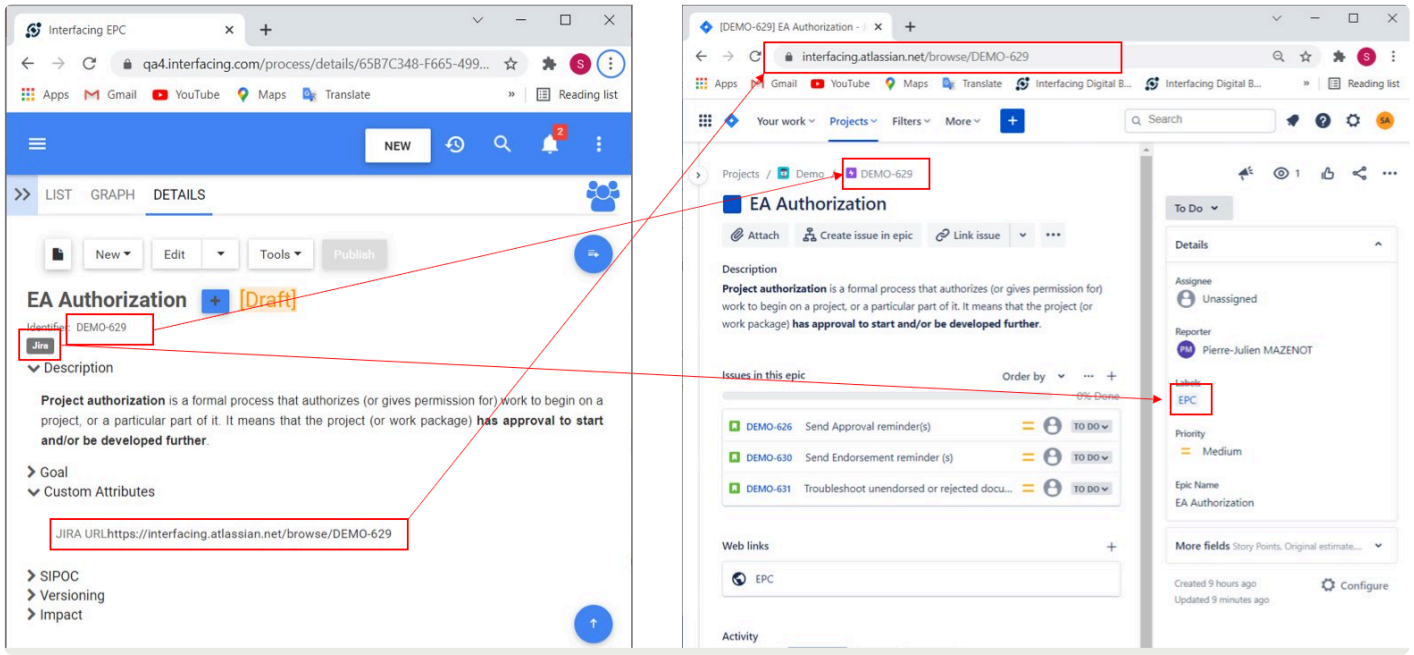
Go to the Proprieties tab, in the Categories section, and select Jira in the dropdown menu.



When clicking on “Create a Process”, the Epic will automatically be created in Jira. Each process associated to Jira will create an epic and each flow object will be created as a User Story if associated by the tag. Then, if users add any flow object to the process, the new task in Jira appears as new User Story under the Process Epic.



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



14.2 Essential Projects Two-way Integration

Building a bridge between IT Enterprise Architects and Business (BA, QM, Employees)

Essential projects is a great tool for developing in-depth technical IT enterprise architecture asset and data blueprints, however, it lacks the process alignment, functionality for managing quality, compliance and improvement initiatives and isn't a tool made for the everyday employee to do their work (training, SOPs, WI, continuous improvement). The IT department have documented and are responsible for managing certain informational entities like assets, and meta data within their EA solution. Business requires this information to align it with the business processes, documents, regulations, risks, controls, capabilities, etc., however, they do not want to duplicate the effort to manage it in another location and it isn't within their responsibility to manage these information entities either.

Interfacing's Essential Project middleware bi-directional sync automatically updates the EPC whenever an IT asset is created or updated and inversely creates and updates the relationships of those assets within Essential to other business informational entities (eg. Processes, tasks, roles/responsibilities, documents, regulations, risks, controls, capabilities, etc) so that IT benefits also benefits from the insight into the touchpoints across the business without requiring any additional analysis work by their team.

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

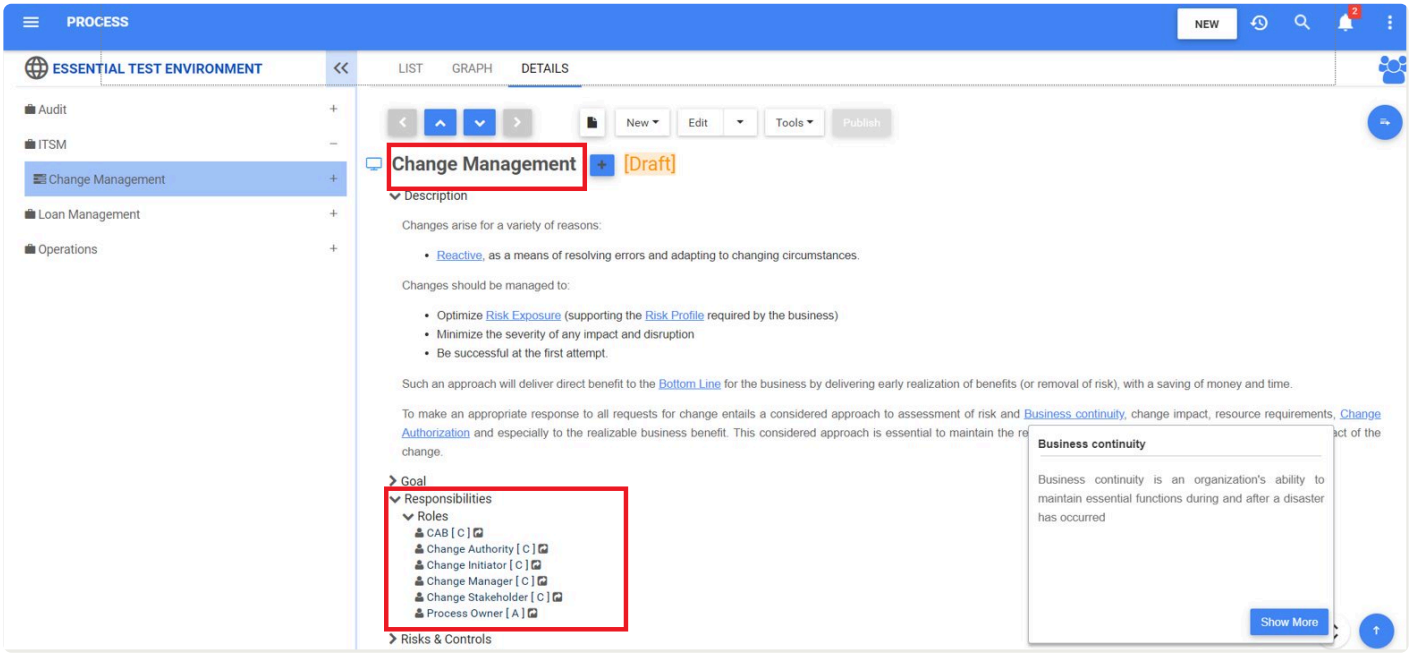
- Synchronize Resources, Organization units, Assets and Systems
- Synchronize object attributes
- Add, manage and synchronize relationships between various objects (process, assets, resources, etc.)

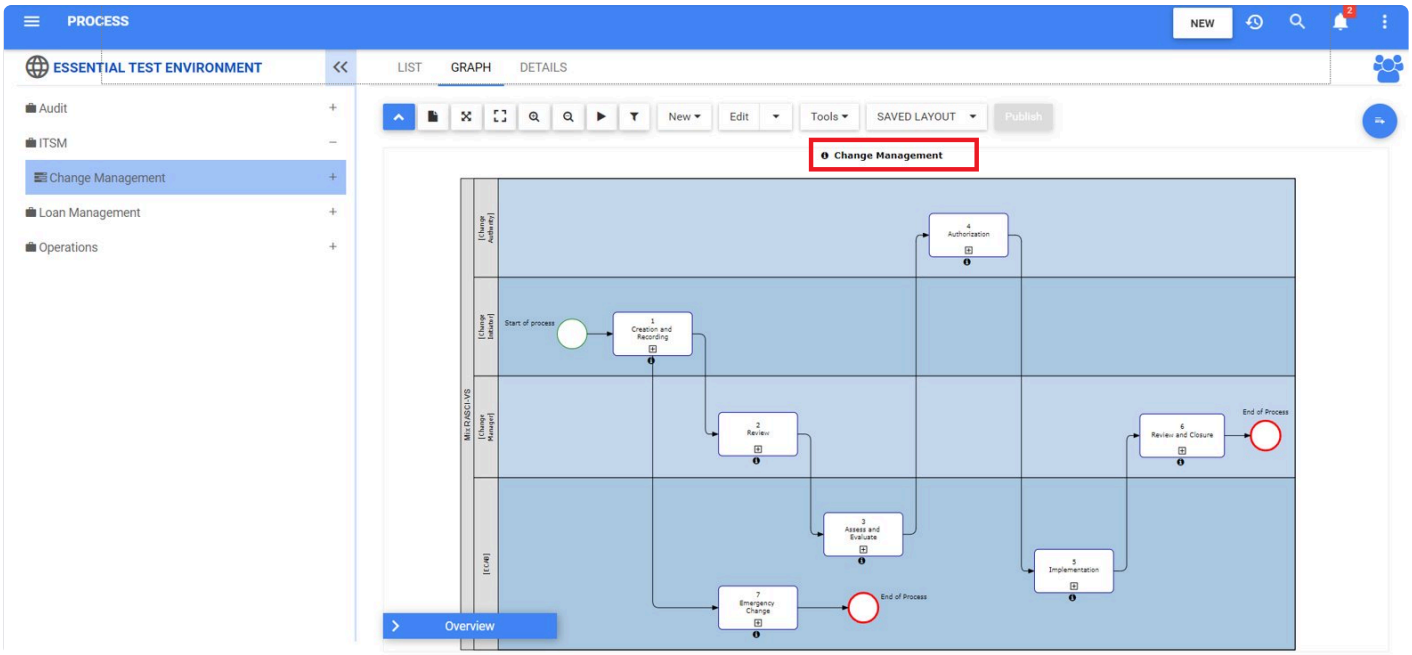
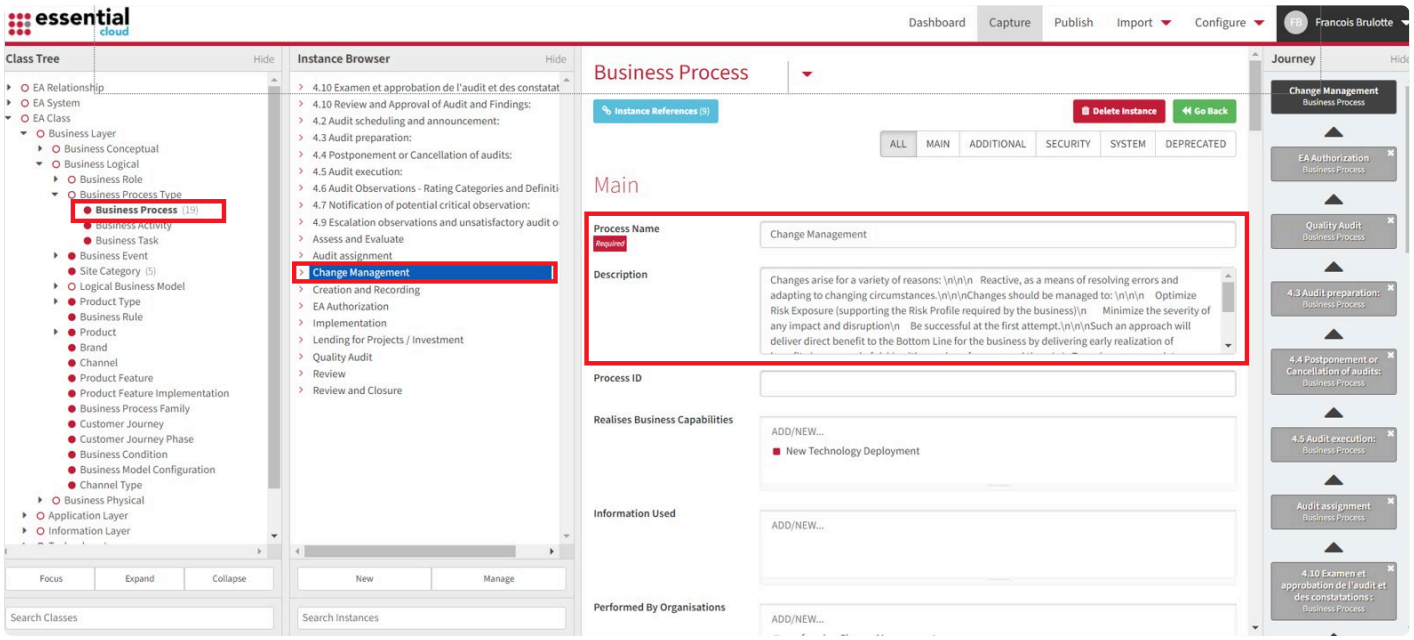
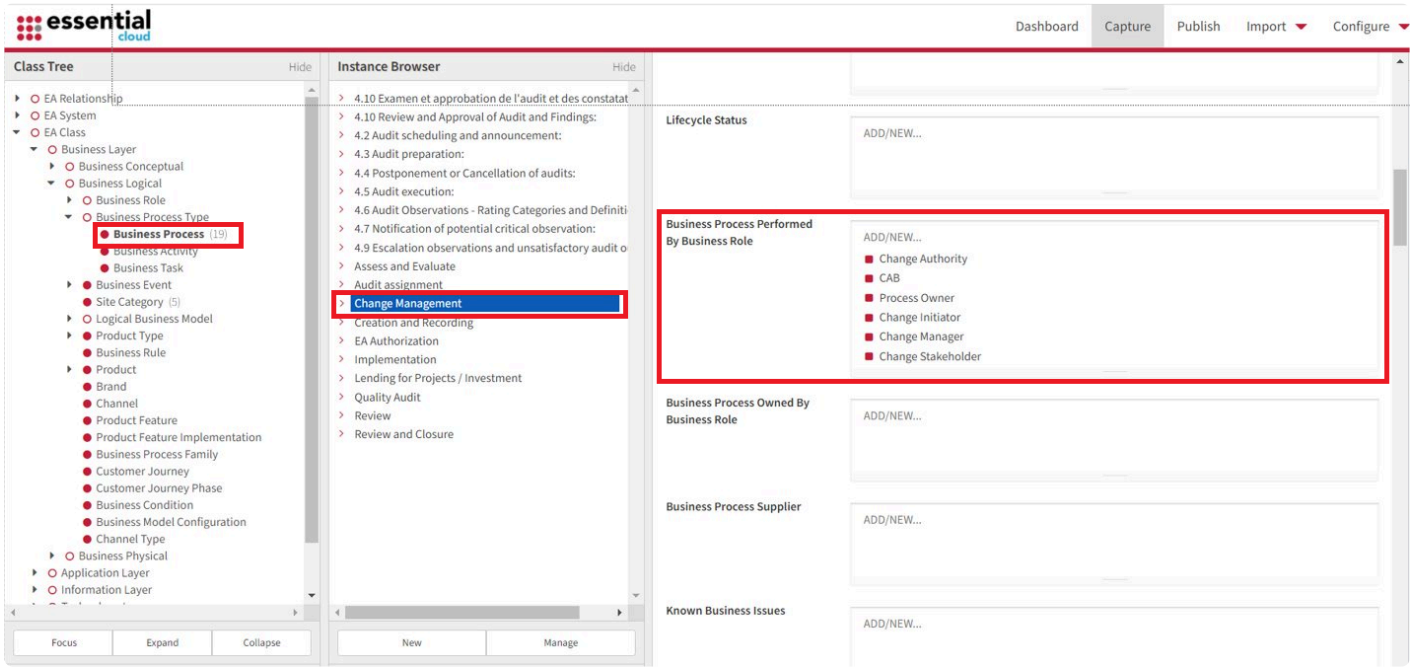
14.2.1 Creating an EA Solution From EPC

If users create a process in EPC and create the relationships to that process (e.g. org unit, resource, asset, role), those objects will be created automatically within Essential Project. Furthermore, objects that are created in EAS will be created in EPC. This is how both systems are able to communicate and ensure synchronization.

To create an EA Solution:

Create a process in EPC and add the process' respective responsibilities.





The Process will be created, with all its relationships, in Essential Projects.