interfacing.

EPC Basic User Training
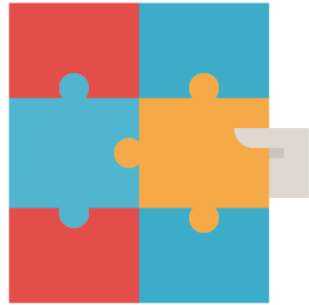Configuration Options

Objectives: Configuration Options

Profile
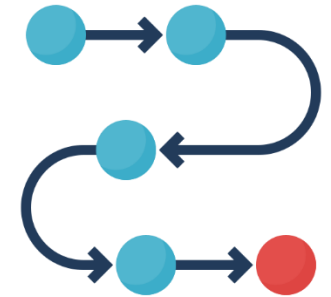Learn how to configure profile settings.

Widgets
Learn how to configure widget layouts and settings.

Lists
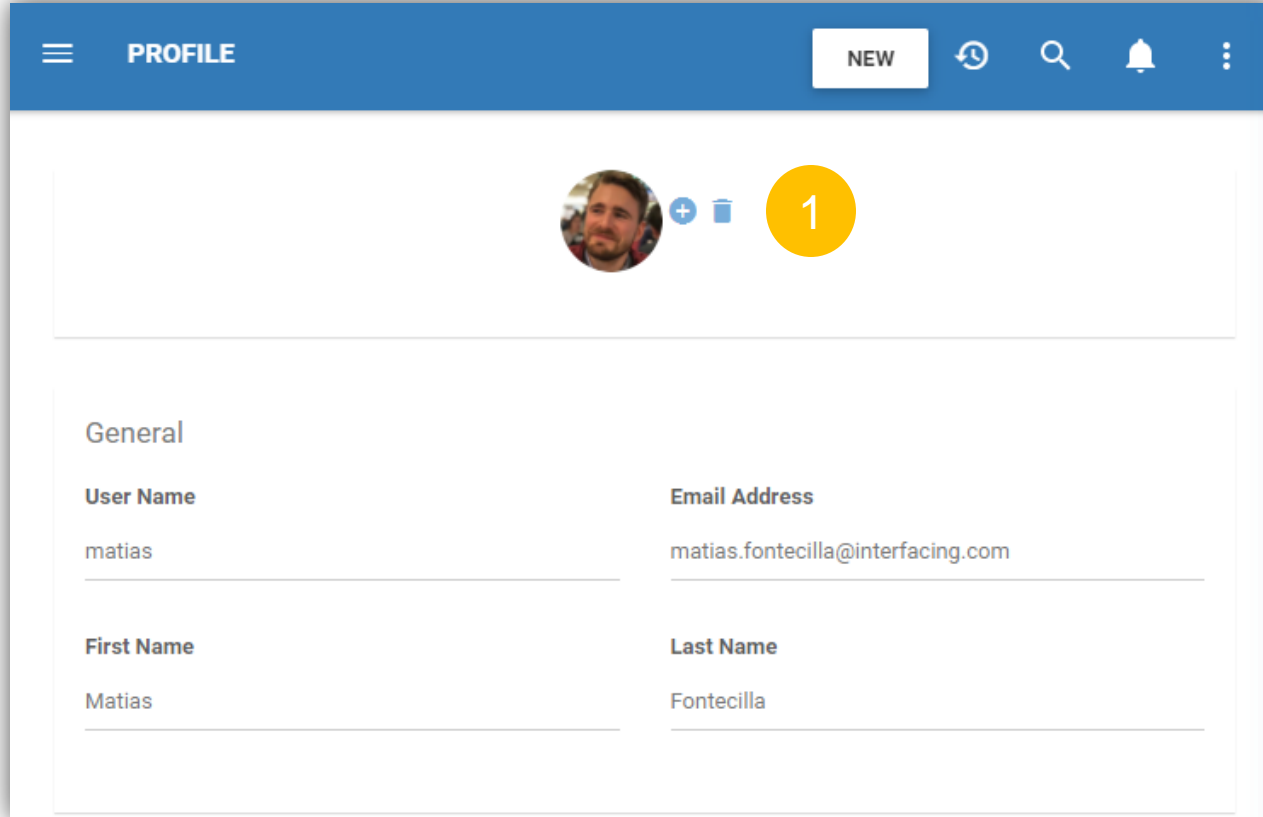Learn how to configure list layouts and settings.

Graphs
Learn how to configure Graph layouts and settings.

My Profile

The My Profile interface allows the user to configure some basic settings for their instance of EPC.
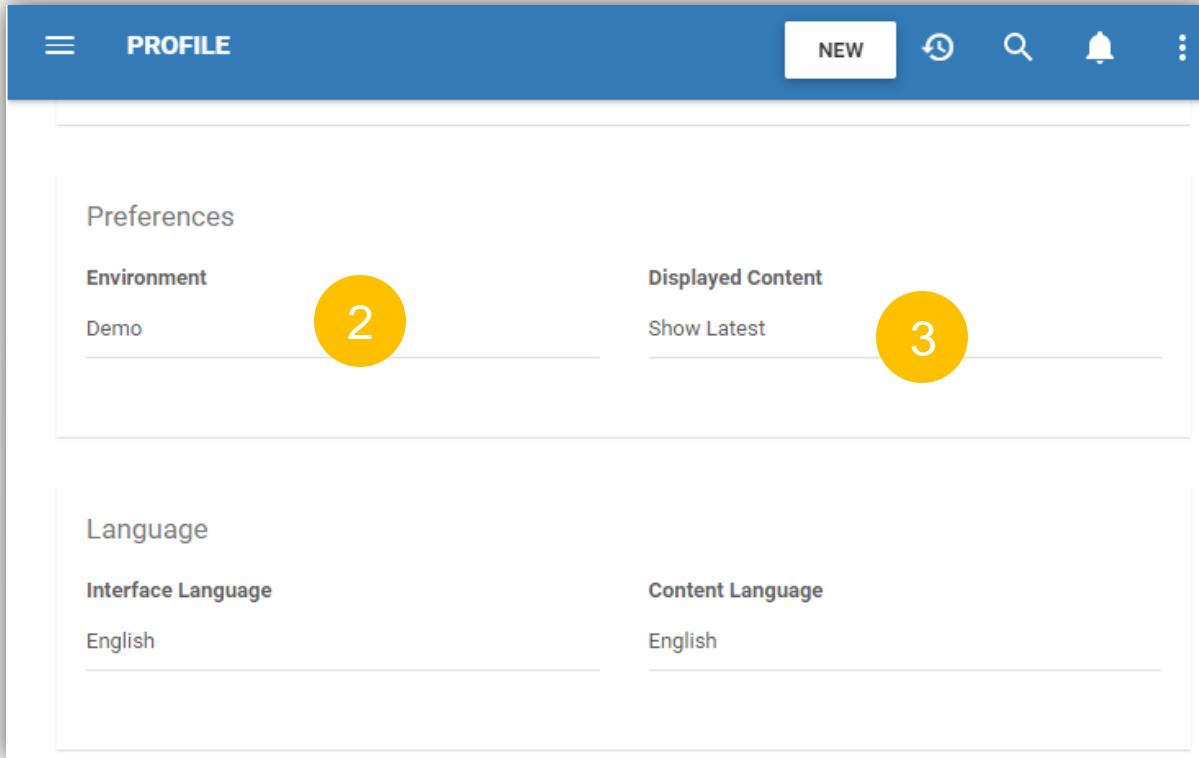

1. Profile Picture

- Set your profile picture
- Use a professional head shot if possible

Profile Pictures allow for more personable interactions within applications.

My Profile

The My Profile interface allows the user to configure some basic settings for their instance of EPC.

2. Environment
- Users can toggle environments they have access to here
- In most cases, users only have access to a single Production Environment
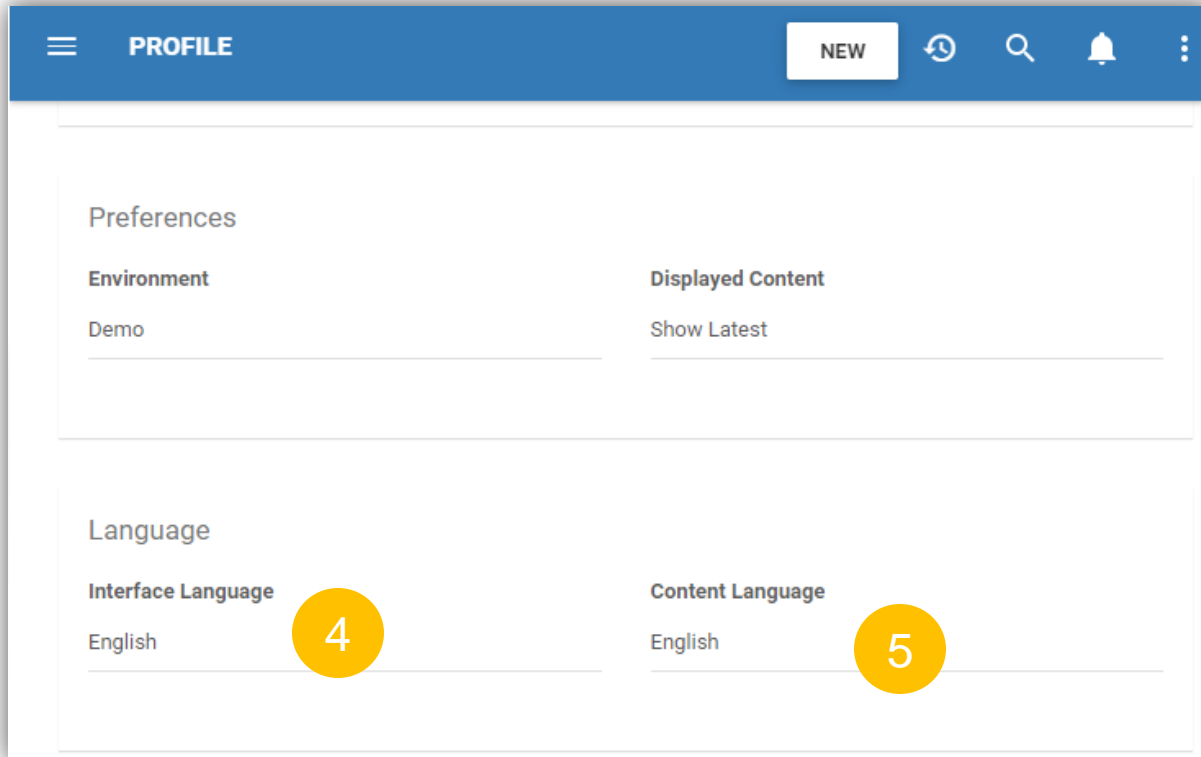
3. Displayed Content
- EPC has a Latest (private) and Published (public) database.
- This allows end-users to have a clean library of only published information.
- If provided access, a user can toggle databases here.

Preference settings are pre-configured by Administrators. End users only need to toggle databases when Endorsing/approving unpublished versions.

My Profile

The My Profile interface allows the user to configure some basic settings for their instance of EPC.

4. Interface Language
- Defines the language of your EPC user interface

5. Content Language
- Defines the language in which uploaded content is presented
- If you operate in a multi-lingual organization, content may be written in more than one language

Default Language settings are set by Administrators. Most of the time, content is managed in a single language.

Widgets Overview
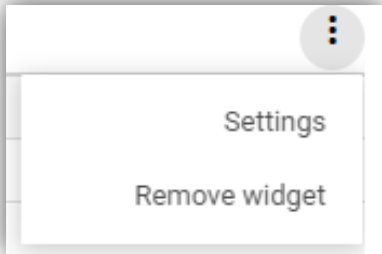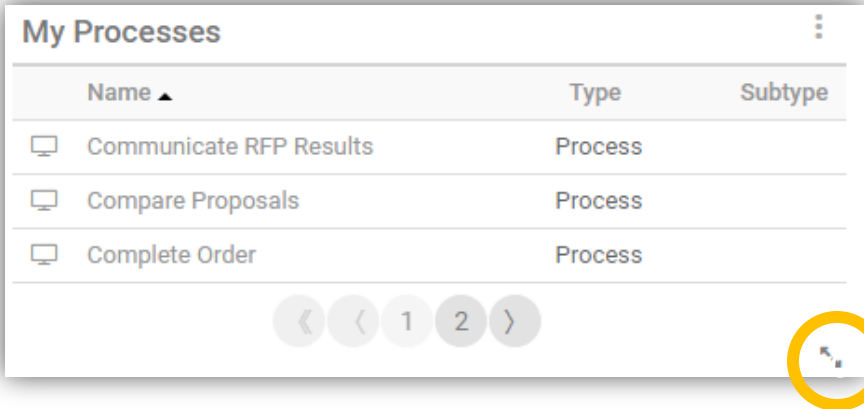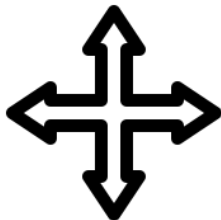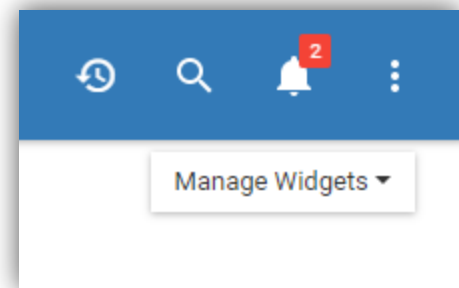
Add New
Add a widget via the Manage Widgets Button.

Move
Move the widget by hovering over it and click to drag.

Resize
Resize the widget by dragging the Resize button located in the widget's bottom right corner.

Settings
Customize the widget by accessing the Settings button located in the widget's top left corner.

Add Widgets

Add Widgets to access personalized content from your home page.

1. Click on the Manage Widgets dropdown on the top right of your home screen
2. Click on the Dashboard Manager option
3. A popup will open with all available widgets. Click on Add to insert a new widget.

My Objects
My Objects widget allows users to view a list of objects associated to the processes they are tied to within EPC
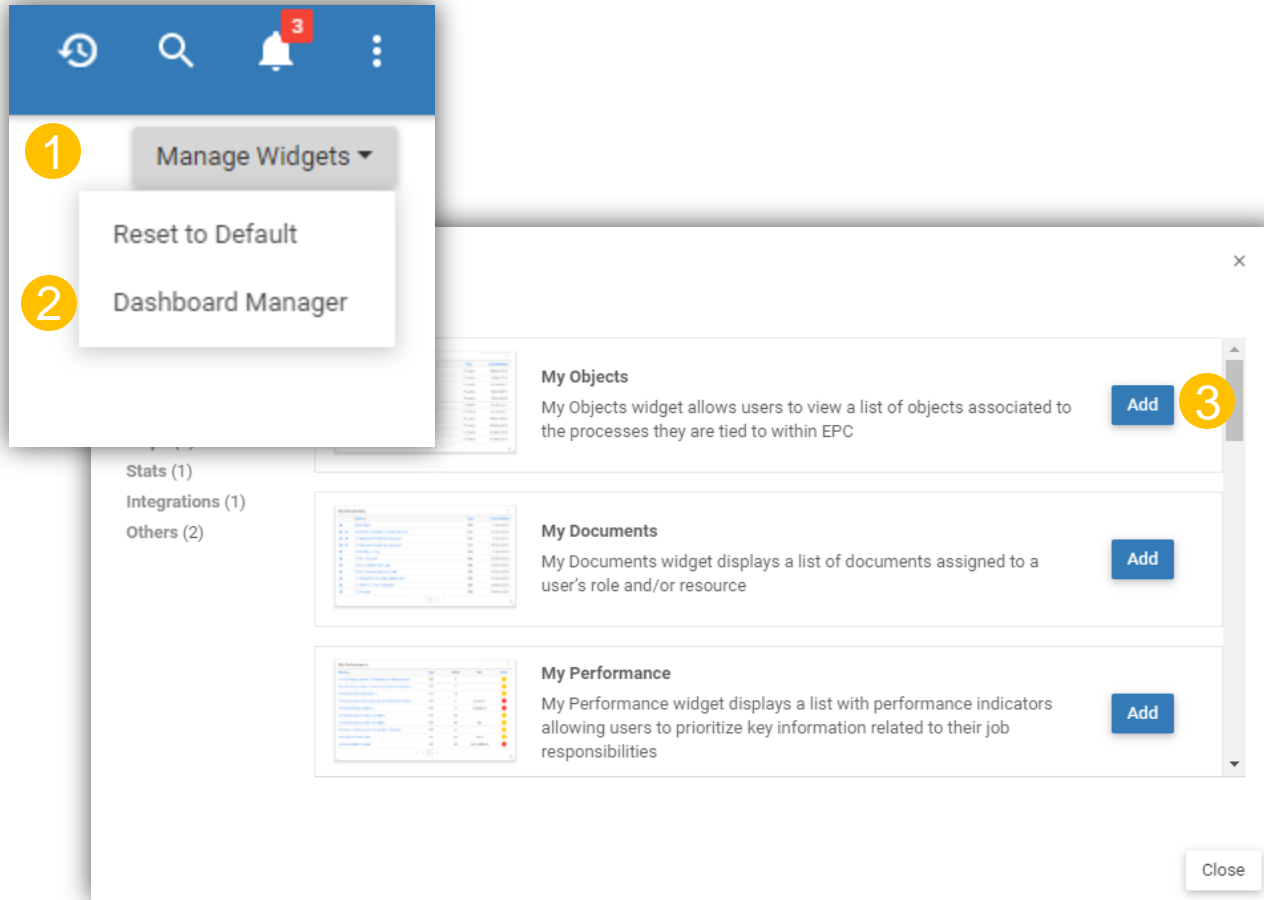
Stats (1)
Integrations (1)
Others (2)

My Documents
My Documents widget displays a list of documents assigned to a user's role and/or resource

My Performance
My Performance widget displays a list with performance indicators allowing users to prioritize key information related to their job responsibilities

The My Objects widget has the most configuration options.

Remove Widgets

Remove widgets you no longer require.

My Processes

Name ▲	Type	Subtype
Communicate RFP Results	Process	
Compare Proposals	Process	
Complete Order	Process	

1

Settings

Remove widget

2
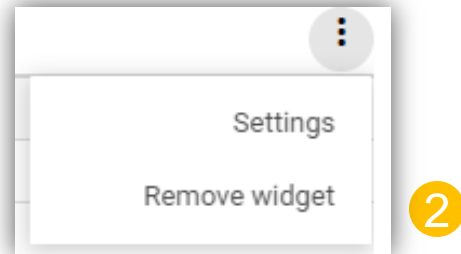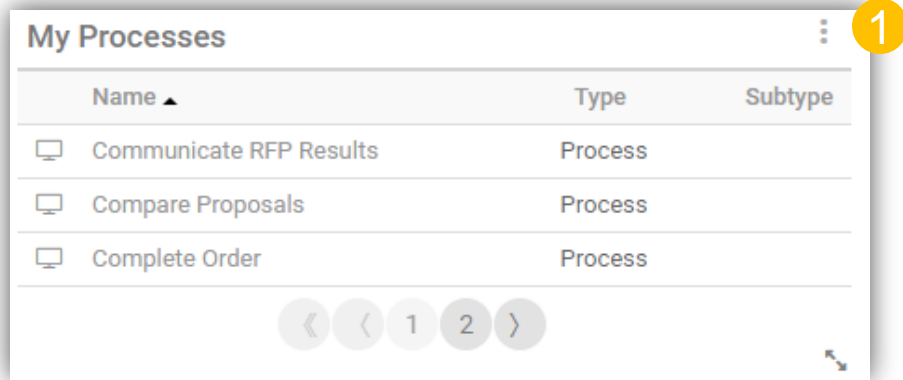
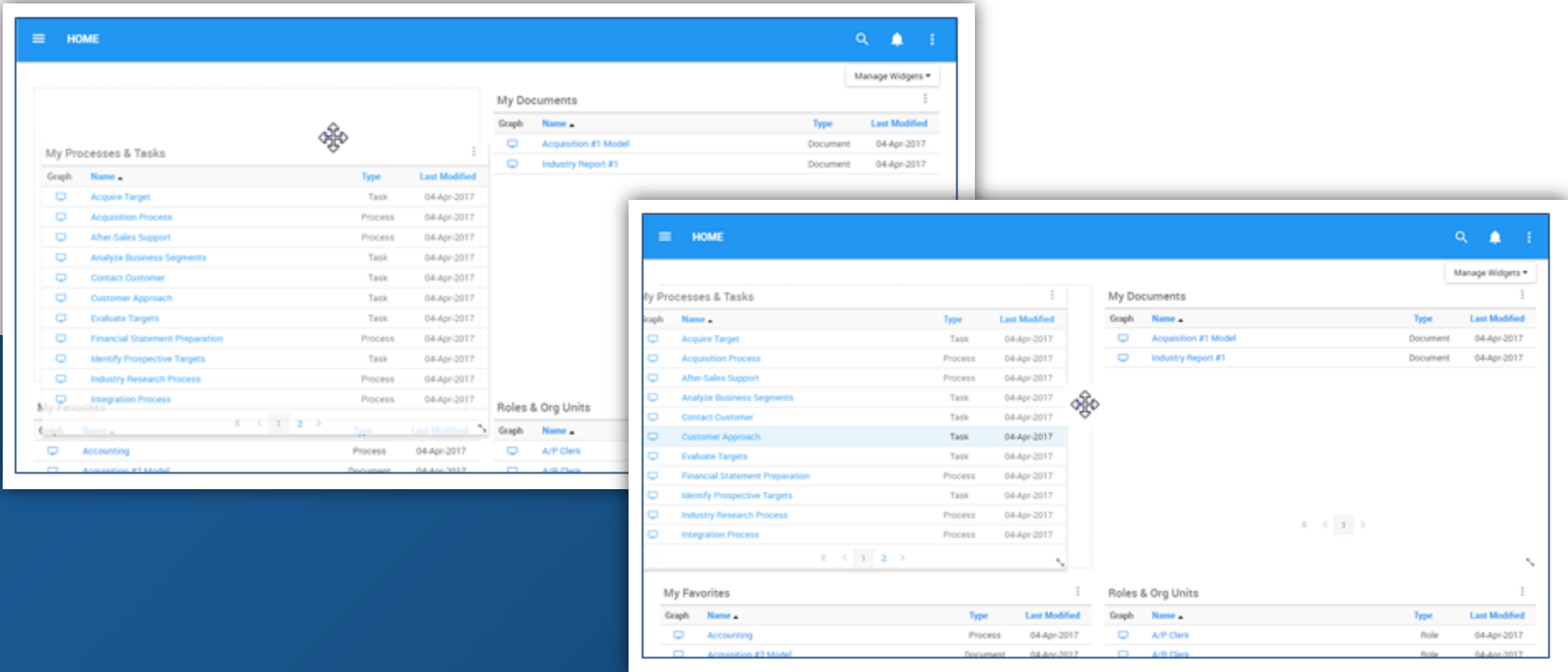1. Click on the ellipsis button at the top right of the widget you wish to delete.
2. Click on Remove Widget

Move Widgets

Move widgets around by clicking on one of its extremities and drag-dropping it to your desired location.

Resize Widgets

Select the Resize icon and resize the Widget by moving the cursor around on the screen.

Widget Settings

Configure your widget settings so that they can present the content that matters most to you.
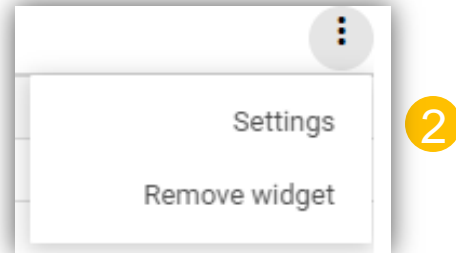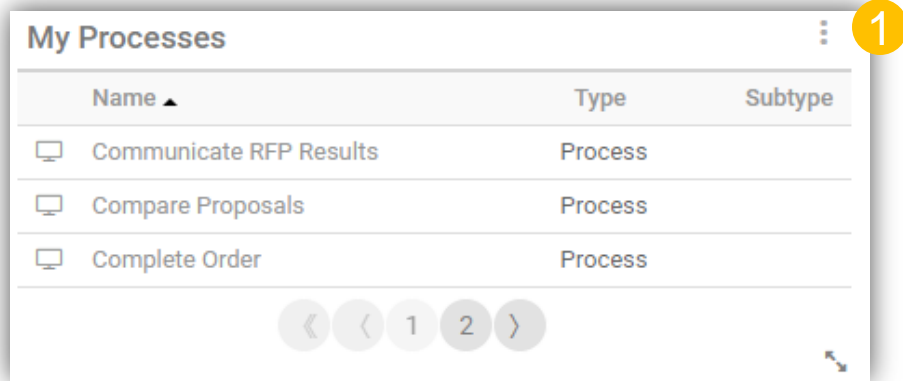
1. Click on the ellipsis button at the top right of the widget you wish to delete.
2. Click on Settings
3. A popup will open offering several Configuration options depending on the type of widget you chose.

Widget Settings (My Objects Widget)

The My Objects widget has the most configuration options.

My Objects

General

(1) Name :   My Processes

(2) Object Type :   PROCESS

Object Sub-type :   NOTHING SELECTED

Categories :   NOTHING SELECTED

Hide name :   ☐

My Options

(3) Assigned to me as :   BUYER   My RASCI-VS :   RESPONSIBLE, ACCOUNTABLE

(4) Filter for My Favorites :   ☐

Filter for My Subscriptions :   ☐

More Options

(5) Assigned to   👤 0   FILTER TYPE   ▼   Filter ...

Assigned to as   RASCI-VS: NOTHING SELECTED

Close   Save changes

My Objects Widget Settings

1. Give the Widget a name or hide the name.
2. Filter for your preferred object types
3. Filter for objects directly assigned to you or one of your roles. Additionally filter for different responsibility types.
4. Filter to only show your favorites or subscriptions.
5. Filter to only show content associated to other roles or organizational units. Additional filter for different responsibility types.

Reset Widget Settings

Reset your Widget settings to the default set by Environment Administrators
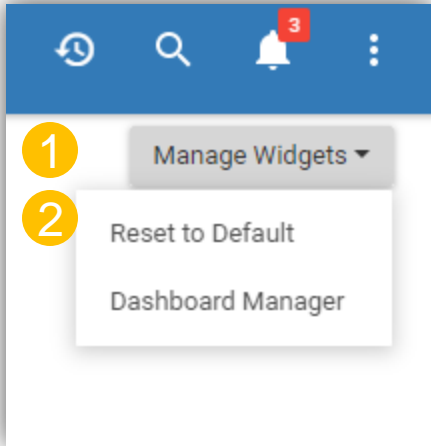
1. Click on the Manage Widgets dropdown on the top right of your home screen
2. Click on the Reset to Default Button
3. A popup will open as a validation request. Click on Delete to finalize the Widget Reset
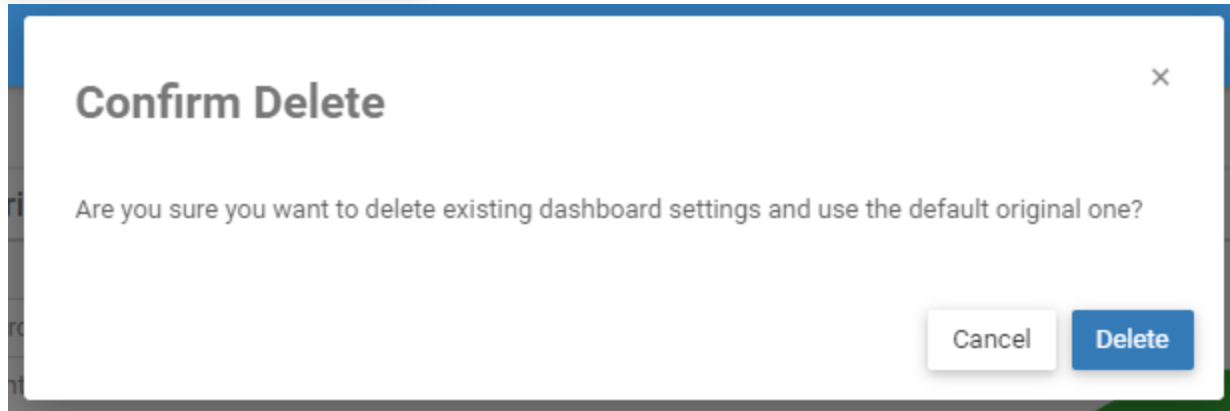
Environment Administrators may inform you if they have pushed new default settings that you may want to reset to.

List Tab

You can reorder/show/hide columns and change hierarchy filter settings.

The list tab's columns and hierarchy filter settings can be configured to your preferences.

List Tab

You can reorder/show/hide columns and change hierarchy filter settings.
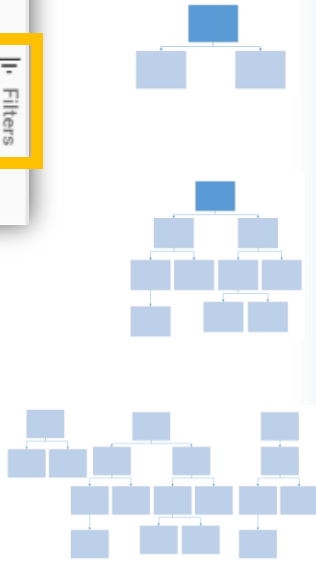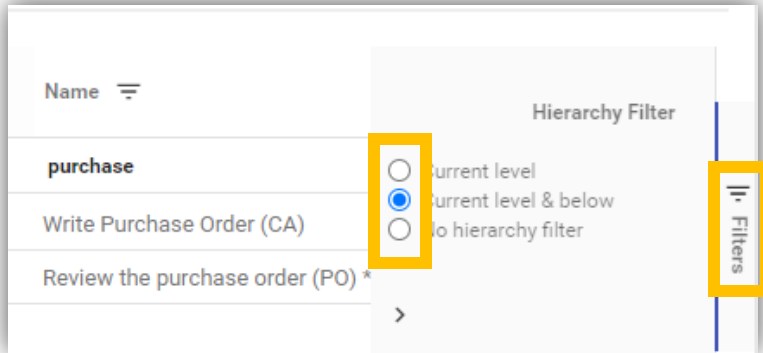
Hierarchy filtering

- **Current Level**: Lists objects <u>one level below</u> the object selected in the Tree.

- **Current Level & Below**: Lists <u>all levels below</u> the object selected in the Tree.

- **No Hierarchy filter**: Lists <u>All items in the module</u> regardless of the object selected in the Tree.

Remember that a change to these settings is applied and saved across every module.

List Tab

You can reorder/show/hide columns and change hierarchy filter settings.

Column Configuration

1. Add/remove columns by clicking on the checkboxes
2. Reorder columns by drag and dropping them
3. Resize columns by dragging the columns' extremities
4. Save your changes
5. Reset your settings to default

Default column configurations are saved by administrators.

Graph Settings

The same EPC map can be adjusted in many different ways to extract insights from it. Here are a few examples:

Swimlane Mode
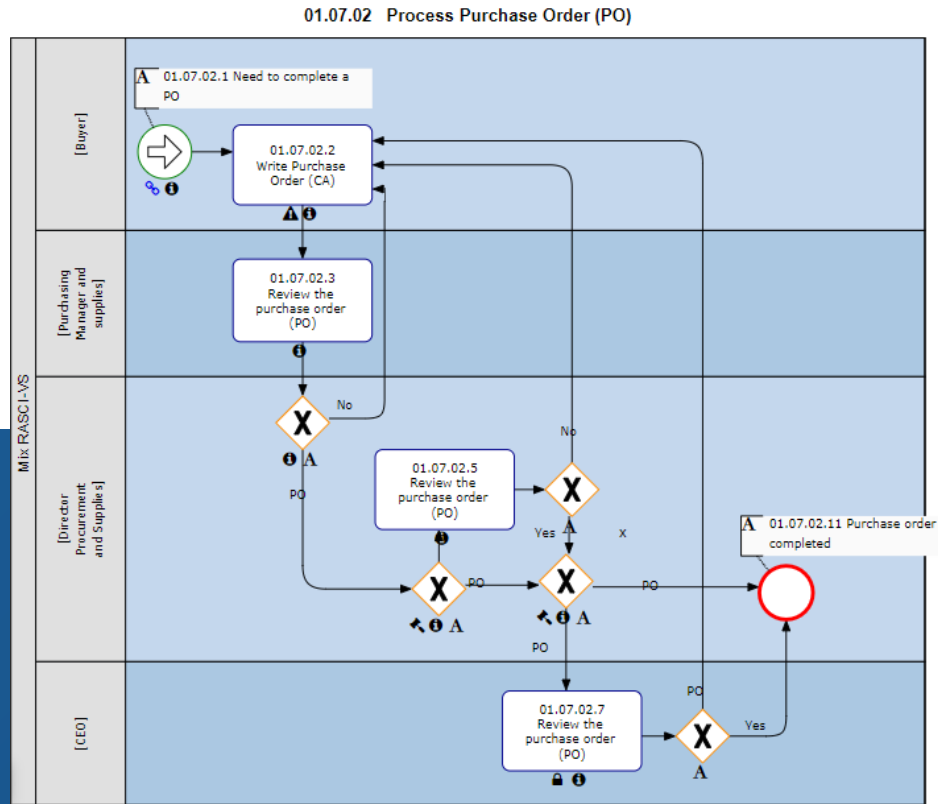
Graph Mode – No Icons
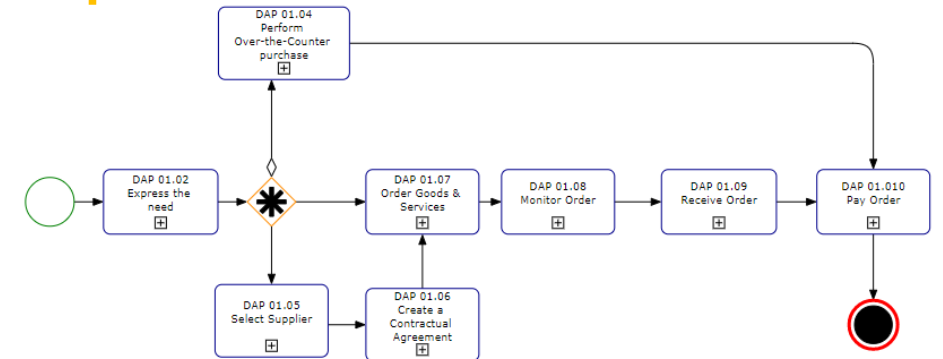
Graph Mode with Icons and KPI color
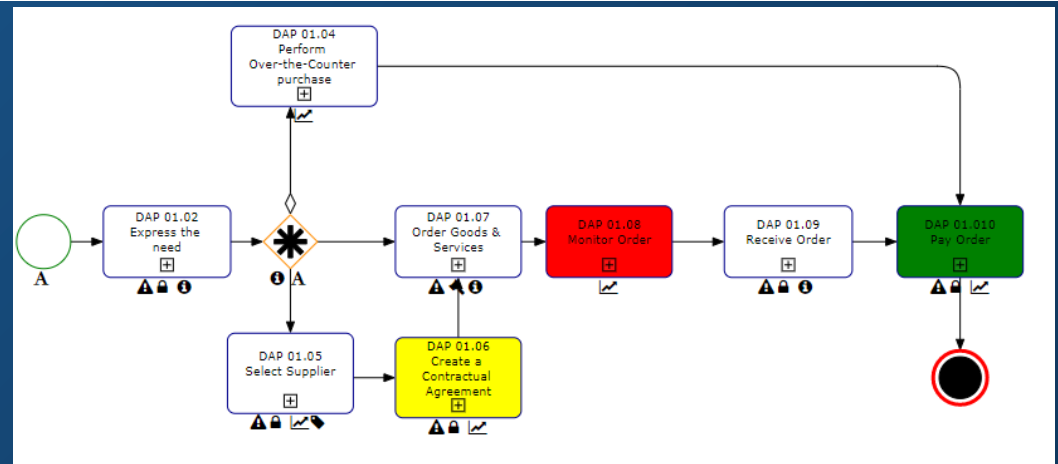
Change map settings to configure map layouts, enable/disable functionalities, and show/hide content.
Full list of options here: https://www.interfacing.com/help/epc10-webapp/12.1/en/topic/4-4-3-2-4-graph-customization

Access to Graph Settings
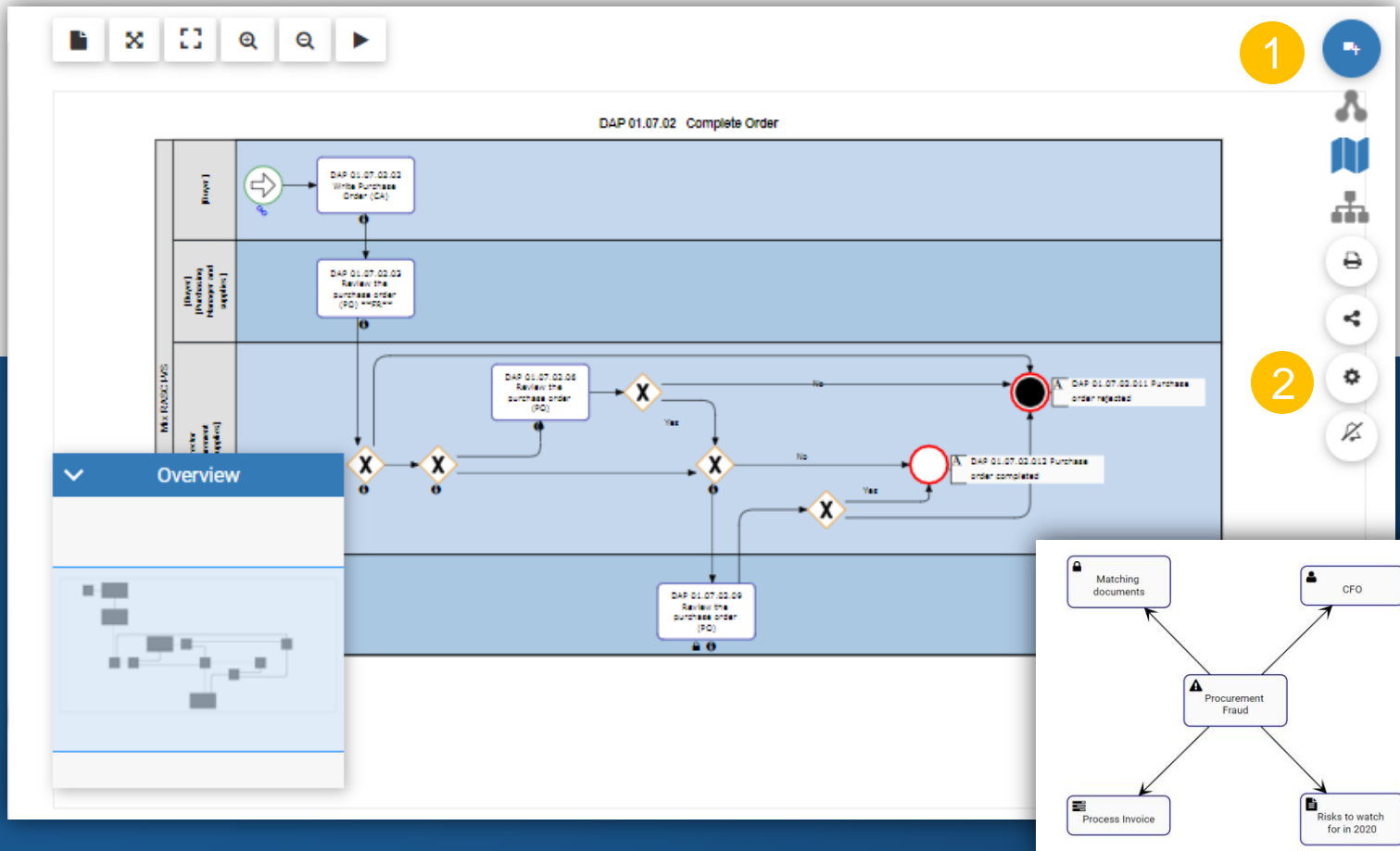
Graph Settings:

1. Click on the More Features button
2. Click on the Settings button
3. A form will pop up with several settings to adjust, depending on the type of graph being adjusted.

Map Graph Settings

You can configure map layouts, enable/disable functionalities, and show/hide content.

Map options

General

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

	Purpose
A	Toggle between Graph formats (Graph View, Swimlanes, Matrix Swimlanes, Process Preference)
B	Select item to be feature on Swimlane X-axis (Matrix Swimlane only)
C	Select item to be feature on Swimlane Y-axis
D	Enable IPLs expansion
E	Enable sub-processes expansion within a current process map
F	Isolate specific roles, resources, assets and org units into separate pools
G	Highlight specific paths (Critical Path, High Risk Path, Value Added, My Tasks, Manual vs. Automated)
H	Enable or disable pre-set node colors
I	Enable or disable pre-set performance colors
J	Toggle between process viewing formats (BPMN 2.0, Simple BPMN, VSM, Modeler Default)
K	Classify process and flow items into categories (e.g. Core Process vs. Support Process)
L	Enable auto-layout on click, on annotation or have the setting constantly applied

💡 Full list of options here:
https://www.interfacing.com/help/epc10-webapp/12.1/en/topic/4-4-3-2-4-graph-customization

Map Graph Settings

You can configure map layouts, enable/disable functionalities, and show/hide content.

	Purpose
M	Show/Hide roles, org units, resources and assets depending on their RACSuI-Vs
N	Show/hide associated objects and choose whether to display them as icons or annotations

Full list of options here:

Impact Graph Settings

You can configure which impacted objects to include.
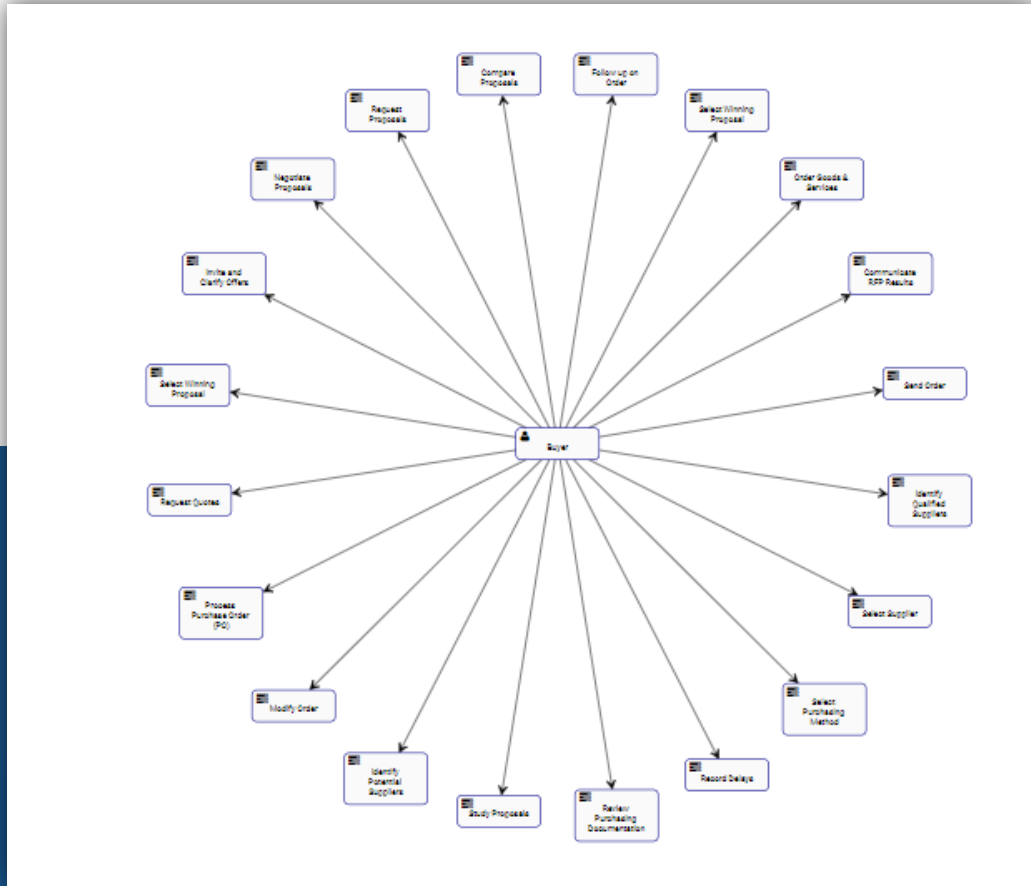
Use this setting to filter through impacted objects.

Reset Graph Settings

Click on Reset to default to restore the defaults set by your Environment Administrators.

See Also – My Profile and Widgets

Here are some useful help files relating to what we have covered so far.

My Profile

1. Add Profile Picture: https://www.interfacing.com/help/epc10-webapp/12.1/en/topic/8-1-1-1-add-user-profile-picture
2. Environments: https://www.interfacing.com/help/epc10-webapp/12.1/en/topic/8-2-1-environment
3. Displayed Content: https://www.interfacing.com/help/epc10-webapp/12.1/en/topic/8-2-2-displayed-content
4. Language: https://www.interfacing.com/help/epc10-webapp/12.1/en/topic/language
5. Theme Settings: https://www.interfacing.com/help/epc10-webapp/12.1/en/topic/theme-color-setting
6. Authorizations: https://www.interfacing.com/help/epc10-webapp/12.1/en/topic/authorizations
7. E-Signature: https://www.interfacing.com/help/epc10-webapp/12.1/en/topic/8-7-add-edit-signature

Widget:

1. Overview: https://www.interfacing.com/help/epc10-webapp/12.1/en/topic/4-2-1-widgets
2. Access to Dashboard Manager: https://www.interfacing.com/help/epc10-webapp/12.1/en/topic/4-2-1-1-1-access-dashboard-manager
3. Widget Types: https://www.interfacing.com/help/epc10-webapp/12.1/en/topic/4-2-1-1-default-widgets
4. Add Widget: https://www.interfacing.com/help/epc10-webapp/12.1/en/topic/4-2-1-2-how-to-add-widgets-from-home-page
5. Customize widget settings: https://www.interfacing.com/help/epc10-webapp/12.1/en/topic/4-2-1-4-how-to-customize-widgets
6. Customize Home Page Layouts: https://www.interfacing.com/help/epc10-webapp/12.1/en/topic/4-2-1-6-how-to-relocate-widgets-within-home-page
7. Resize Layouts: https://www.interfacing.com/help/epc10-webapp/12.1/en/topic/4-2-1-7-resizing-widgets
8. Move Widgets: https://www.interfacing.com/help/epc10-webapp/12.1/en/topic/4-2-1-6-2-moving-widgets-within-a-home-page

Click through these for even more information on module components.

See Also – List and Graph

Here are some useful help files relating to what we have covered so far.

List

1. Overview: https://www.interfacing.com/help/epc10-webapp/12.1/en/topic/4-2-2-list
2. Sorting: https://www.interfacing.com/help/epc10-webapp/12.1/en/topic/4-4-2-1-sorting
3. Filtering: https://www.interfacing.com/help/epc10-webapp/12.1/en/topic/4-4-2-2-filtering

Graph

1. Navigation: https://www.interfacing.com/help/epc10-webapp/12.1/en/topic/4-4-3-1-1-navigating-in-graphs
2. Map Options: https://www.interfacing.com/help/epc10-webapp/12.1/en/topic/4-4-3-2-4-graph-customization

Click through these for even more information on module components.

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EPC Basic User Training
Configuration Options
End