



# **EPC Basic User Training**

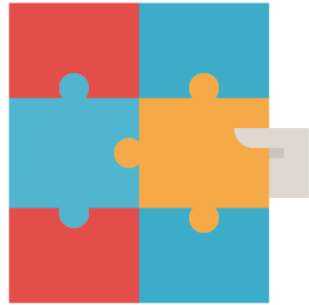
## **Configuration Options**

# Objectives: Configuration Options



## Profile

Learn how to configure profile settings.



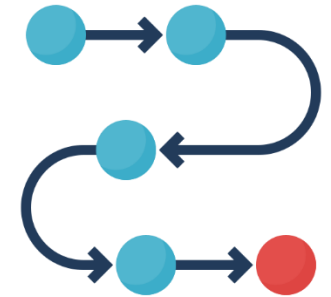
## Widgets

Learn how to configure widget layouts and settings.



## Lists

Learn how to configure list layouts and settings.

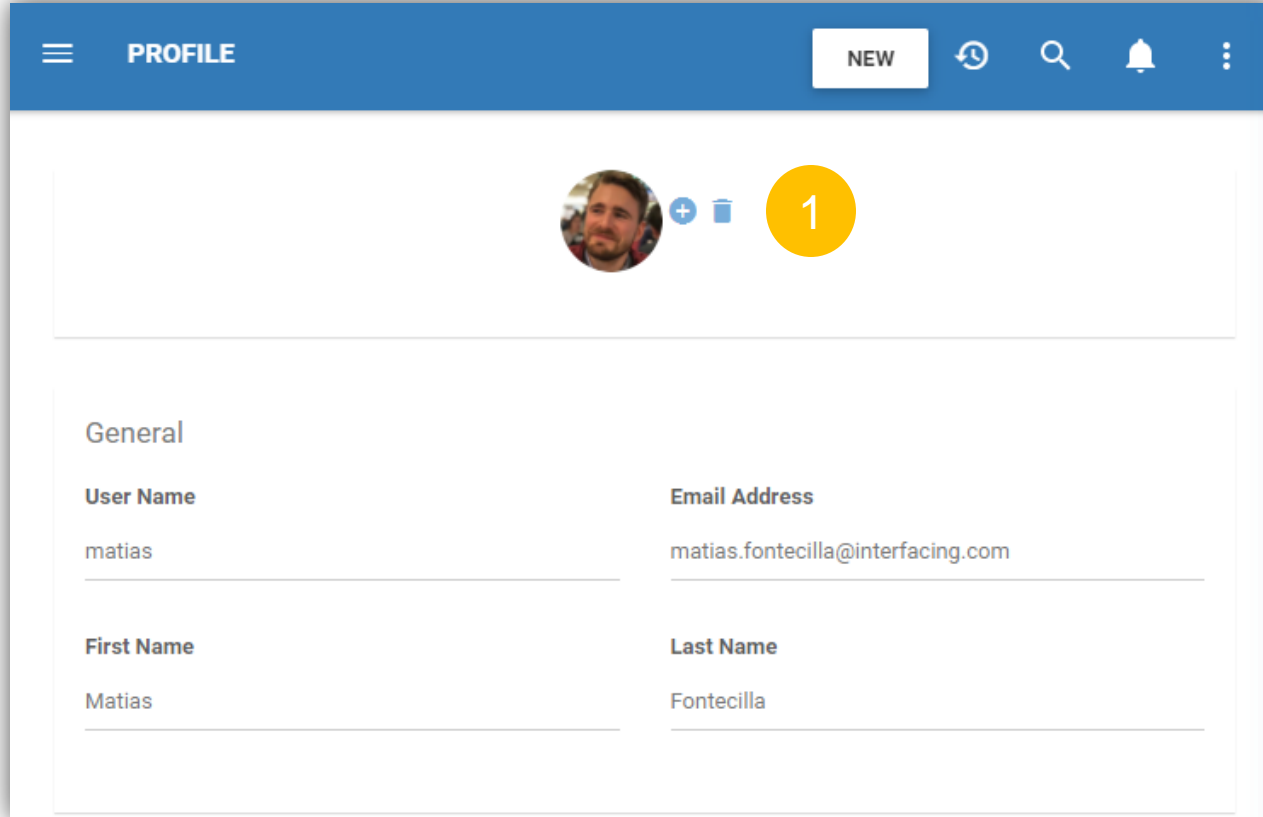


## Graphs

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.



**PROFILE** NEW

Profile Picture: [Profile Picture] + [Trash Icon] 1

**General**

<b>User Name</b>	<b>Email Address</b>
matias	matias.fontecilla@interfacing.com
<b>First Name</b>	<b>Last Name</b>
Matias	Fontecilla

## 1. Profile Picture

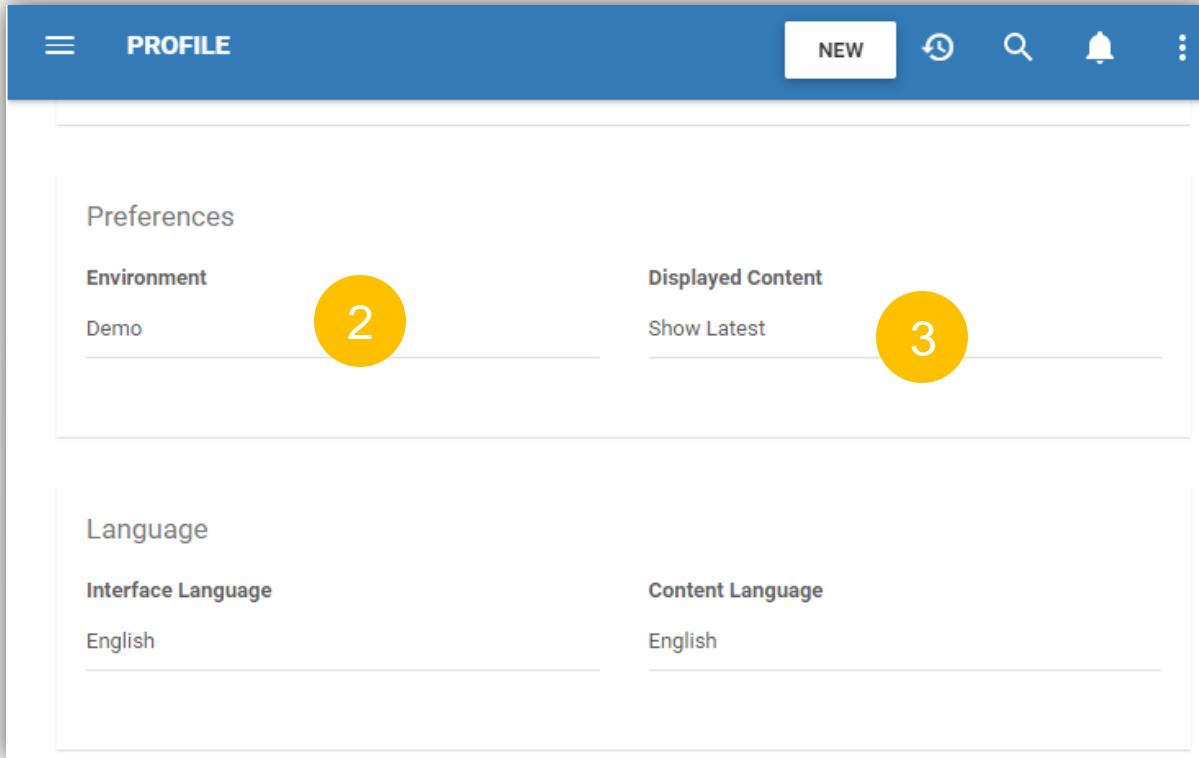
- Set your profile picture
- Use a professional head shot if possible



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.



The screenshot shows the 'My Profile' interface with a blue header bar containing a menu icon, the word 'PROFILE', a 'NEW' button, and icons for refresh, search, notifications, and a settings menu. The main content area is divided into two sections. The top section, titled 'Preferences', contains two columns. The left column is titled 'Environment' and shows 'Demo' with a yellow circle containing the number '2' next to it. The right column is titled 'Displayed Content' and shows 'Show Latest' with a yellow circle containing the number '3' next to it. The bottom section, titled 'Language', contains two columns. The left column is titled 'Interface Language' and shows 'English'. The right column is titled 'Content Language' and shows 'English'.

## 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

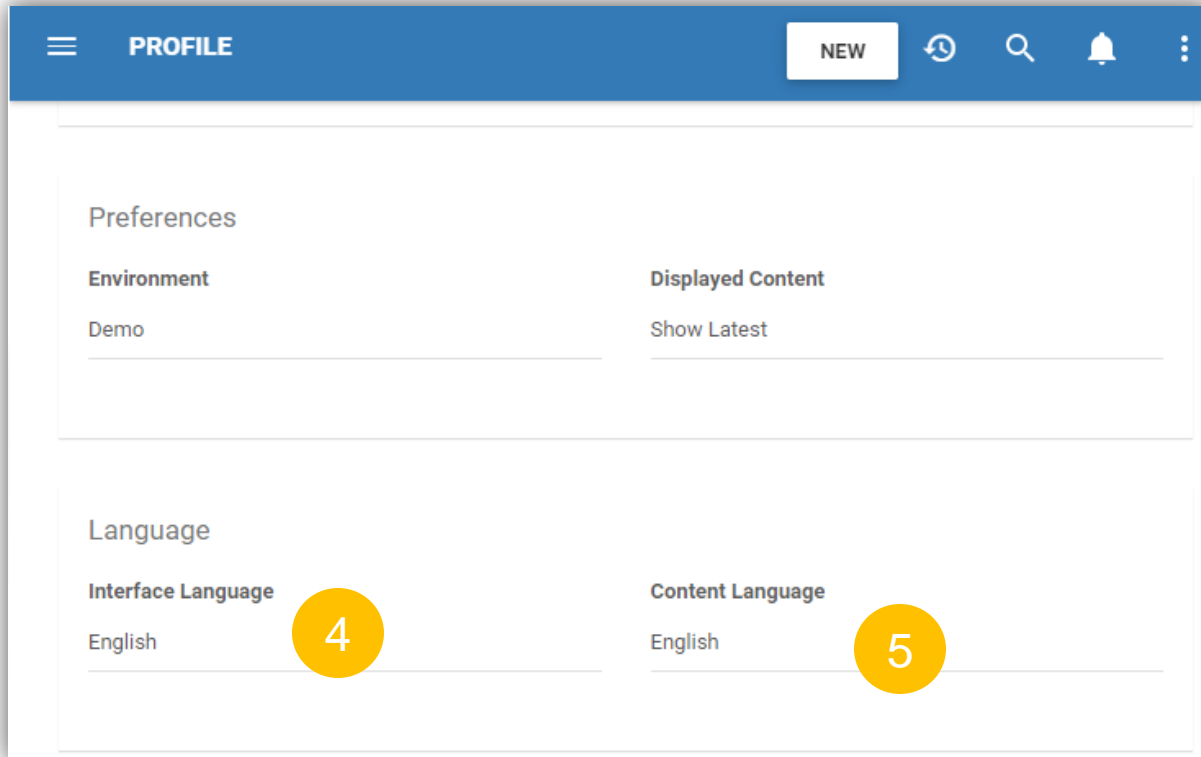
- EPC has a Latest (private) and Published (public) database.
- This allows end-users to have a clean library of only published information.
- If provided access, a user can toggle databases here.



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.



The screenshot shows the 'My Profile' interface with a blue header bar containing a menu icon, the word 'PROFILE', a 'NEW' button, and icons for refresh, search, notifications, and a settings menu. The main content area is divided into two sections. The top section, titled 'Preferences', contains two columns: 'Environment' with a dropdown menu showing 'Demo' and 'Displayed Content' with a dropdown menu showing 'Show Latest'. The bottom section, titled 'Language', contains two columns: 'Interface Language' with a dropdown menu showing 'English' and 'Content Language' with a dropdown menu showing 'English'. A yellow circle with the number '4' is overlaid on the 'Interface Language' dropdown, and a yellow circle with the number '5' is overlaid on the 'Content Language' dropdown.

## 4. Interface Language

- Defines the language of your EPC user interface

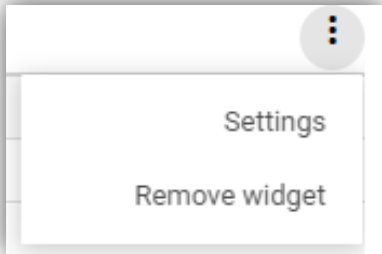
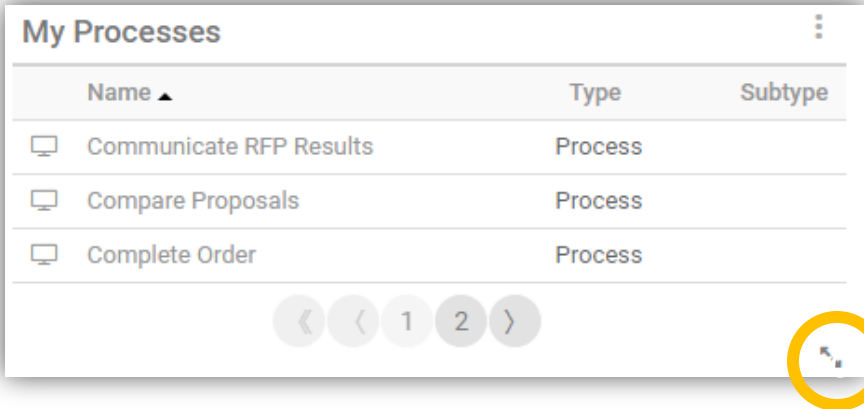
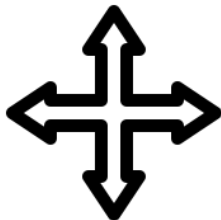
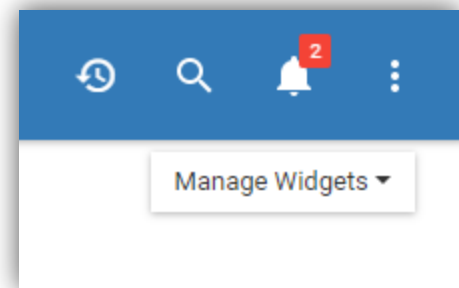
## 5. Content Language

- 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

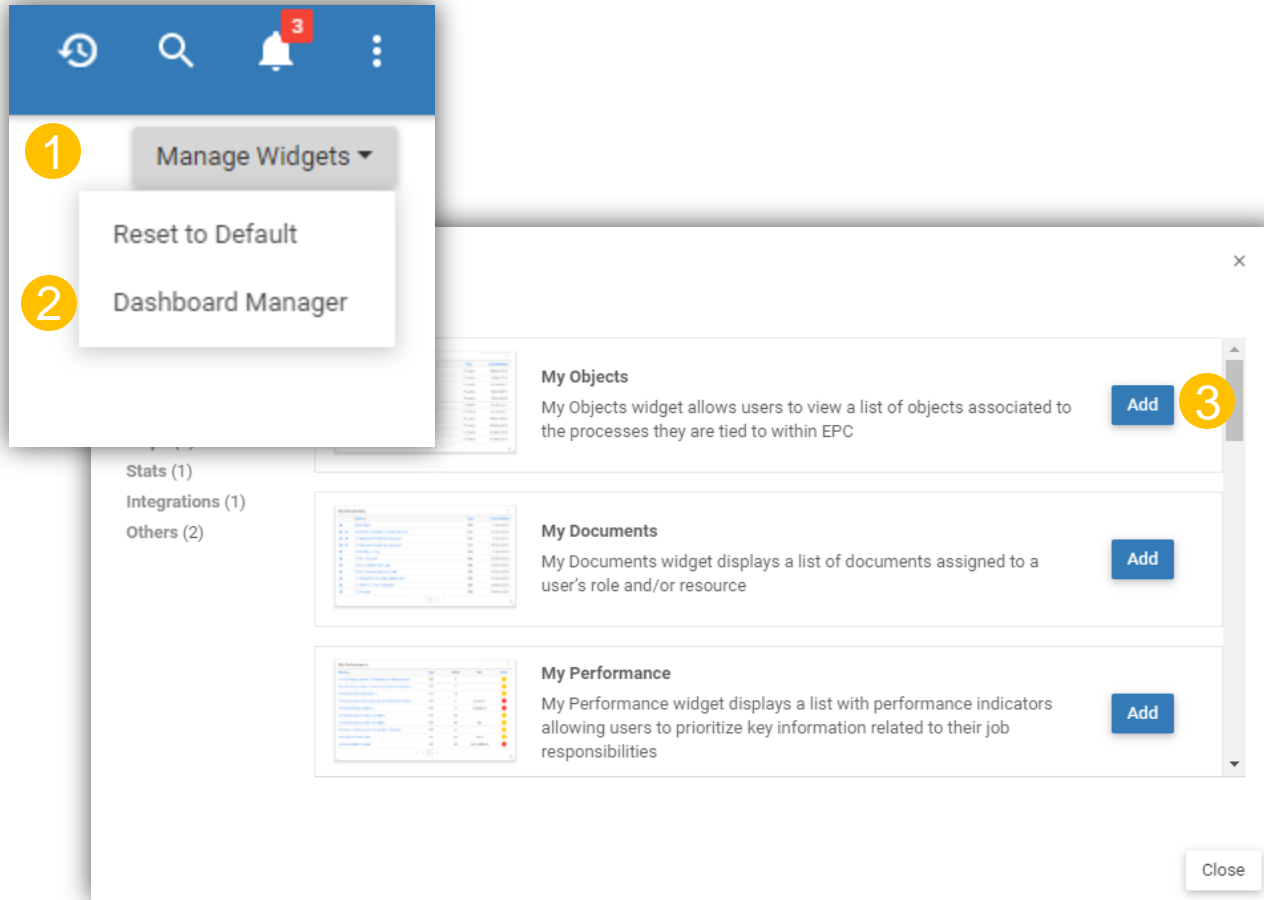
Resize the widget by dragging the Resize button located in the widget's bottom right corner.

## 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.



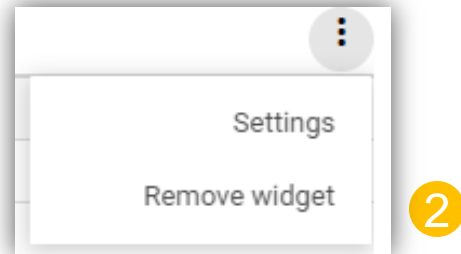
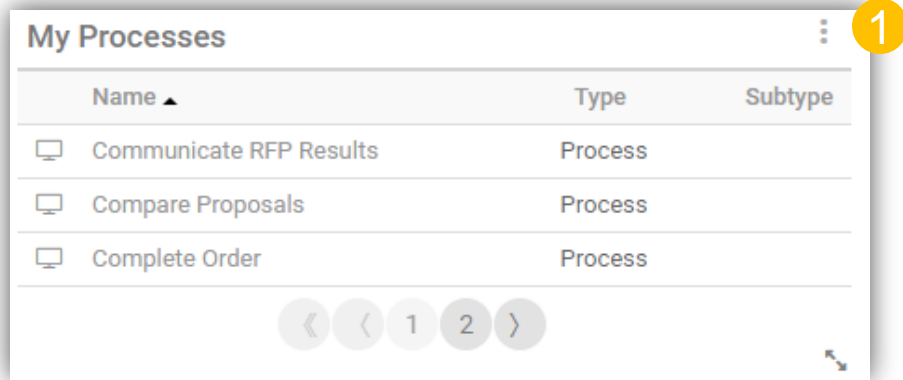
1. Click on the Manage Widgets dropdown on the top right of your home screen
2. Click on the Dashboard Manager option
3. A popup will open with all available widgets. Click on Add to insert a new widget.



The My Objects widget has the most configuration options.

# Remove Widgets

Remove widgets you no longer require.

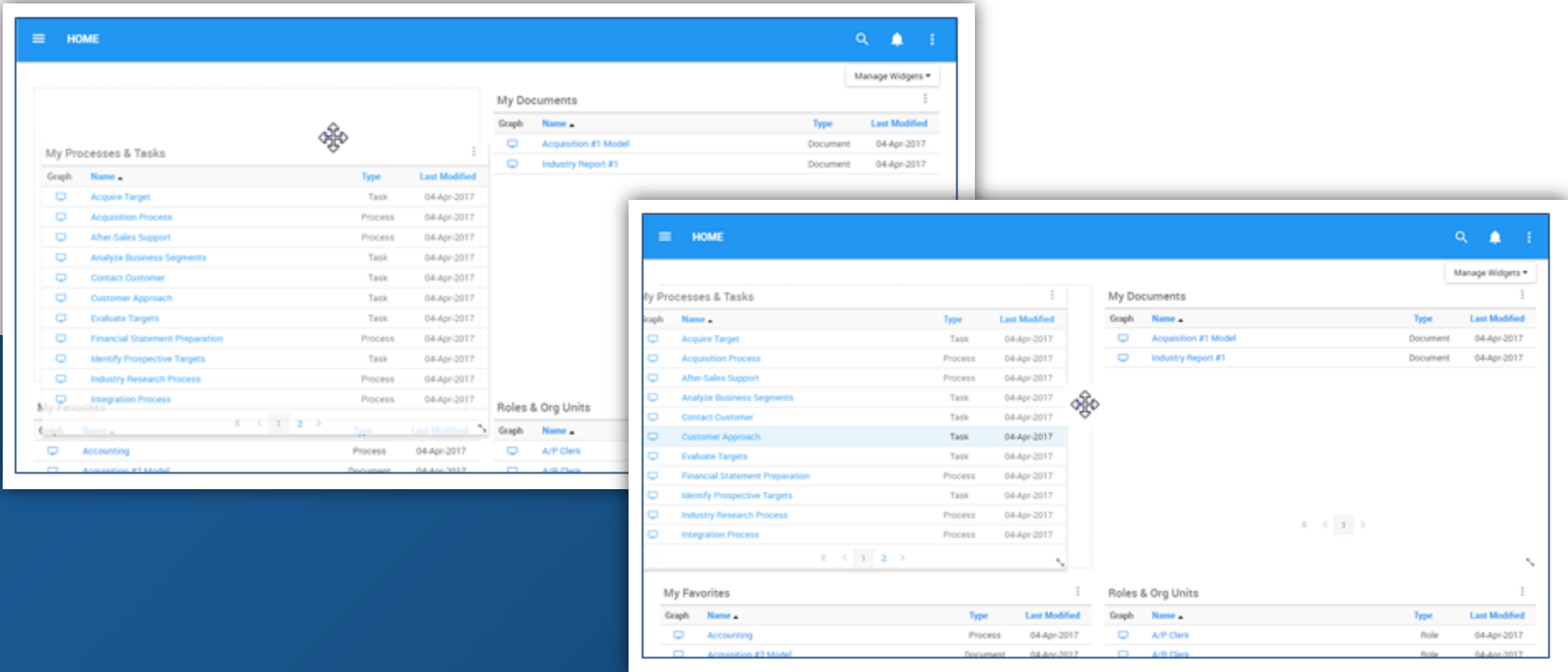


1. Click on the ellipsis button at the top right of the widget you wish to delete.
2. Click on Remove Widget



# 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.

The image displays two screenshots of a dashboard interface, illustrating the process of resizing a widget.

**Top Screenshot:** The dashboard shows three widgets: "My Process", "My Performance", and "My Documents". The "My Process" widget is highlighted with a red box around its bottom-right corner, indicating the location of the resize handle.

**Bottom Screenshot:** The same dashboard is shown, but the "My Process" widget has been resized to a smaller size. A red box highlights the resize handle, and a red arrow points to it, indicating the direction of the resize action.

**Dashboard Data:**

**My Process**

Name	Type	Last Modified
Approve payments	Process	11-Aug-2017
Audit invoices and key data in AP system	Process	11-Aug-2017
Process Invoice	Process	18-Aug-2017

**My Performance**

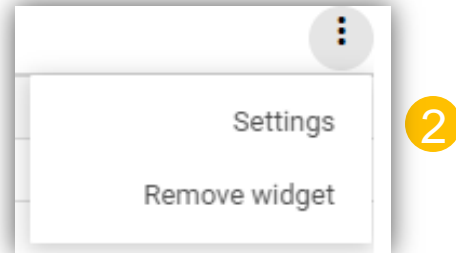
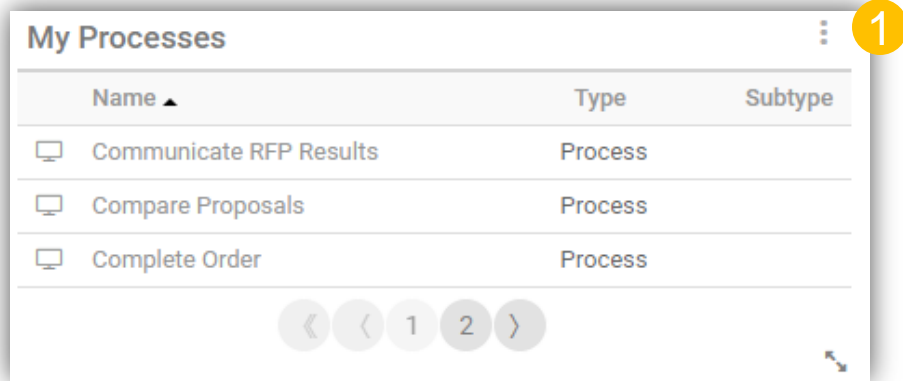
Name	Type	Value	Unit	Color
# of A/P personnel per 100\$ million in...	KPI	0		Green
# of days to fill an employment requis...	KPI	8	days	Yellow
# of goods returned per month	KPI	5	Items	Green
# of invoices including errors per week	KPI	11.24	Items	Red
% of goods shipped on time	KPI	75	%	Red

**My Documents**

Name	Type	Last Modified
*SOP - Accounts Payable	Document	25-Jan-2017
[es] Auditoría del rendimiento mensual	Document	10-Aug-2017
[es] Matriz de riesgo.HTML	Document	10-Aug-2017

# 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

4

Filter for My Favorites :

☐

Filter for My Subscriptions :

☐

More Options

5

Assigned to

0

Assigned to as

FILTER TYPE

Filter ...

RASCI-VS:

NOTHING SELECTED

Close

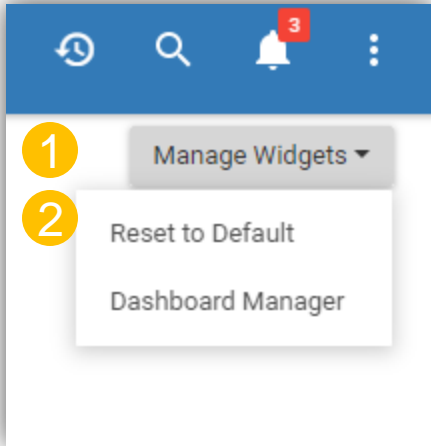
Save changes

## My Objects Widget Settings

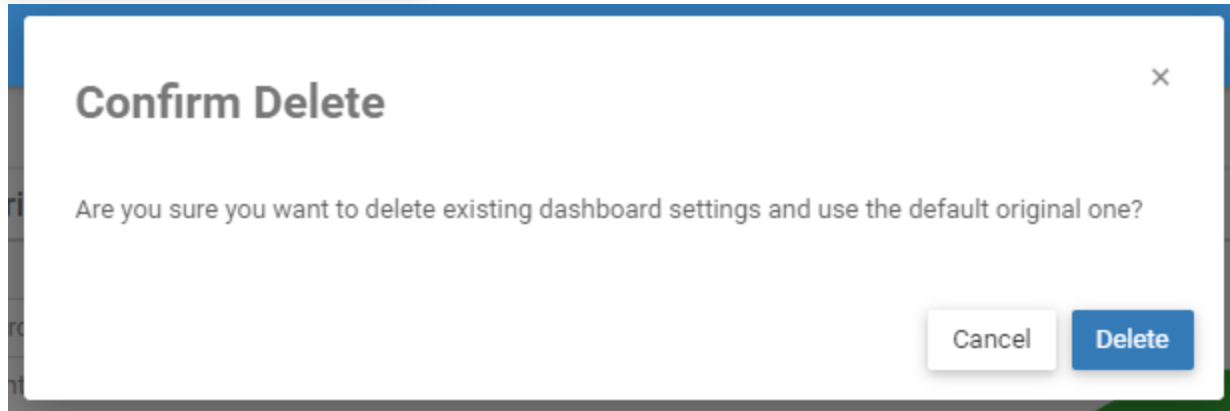
1. Give the Widget a name or hide the name.
2. Filter for your preferred object types
3. Filter for objects directly assigned to you or one of your roles. Additionally filter for different responsibility types.
4. Filter to only show your favorites or subscriptions.
5. Filter to only show content associated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

PROCESS

P2P

Procure-to-Pay

DAP 01 Manage Purchases and Supplies

DAP 01.02 Express the need

DAP 01.04 Perform Over-the-Counter purchase

DAP 01.05 Select Supplier

DAP 01.06 Establish Agreement

DAP 01.07 Order Goods & Services

DAP 01.07.02 Complete Order

DAP 01.07.03 Send Order

DAP 01.07.04 Modify Order

DAP 01.08 Monitor Order

DAP 01.09 Receive Order

DAP 01.010 Pay Order

DAP 01.010.02 Receive and Record Invoice

DAP 01.010.04 Consult Purchase Agreement

DAP 01.010.05 Process Invoice

DAP 01.010.05.7 Enter Invoice Into System

DAP 01.010.06 Pay Supplier

DAP 01.010.07 Close Order

LIST

GRAPH

DETAILS

	Type	Sequence #	Name ↓	Description	Role	Asset	Modified Date
<input type="checkbox"/>	Start	DAP 01.07.02.01			1	1	15-Jan-2020
<input type="checkbox"/>	Task	DAP 01.07.02.02	Write Purchase Order (CA)		1	1	15-Jan-2020
<input type="checkbox"/>	Gateway	DAP 01.07.02.08	Third signature required?		1	1	15-Jan-2020
<input type="checkbox"/>	Gateway	DAP 01.07.02.5	Second signature required?		1	1	15-Jan-2020
<input type="checkbox"/>	Task	DAP 01.07.02.03	Review the purchase order (PO) **FR**		2	1	15-Jan-2020
<input type="checkbox"/>	Task	DAP 01.07.02.09	Review the purchase order (PO)		1	1	15-Jan-2020
<input type="checkbox"/>	Task	DAP 01.07.02.06	Review the purchase order (PO)		1	1	15-Jan-2020
<input type="checkbox"/>	End	DAP 01.07.02.012	Purchase order completed		1	1	15-Jan-2020
<input type="checkbox"/>	Gateway	DAP 01.07.02.04	Purchase order approved?		1	1	15-Jan-2020
<input type="checkbox"/>	Gateway	DAP 01.07.02.010	Purchase order approved?		1	1	15-Jan-2020

<<

Page 1 of More

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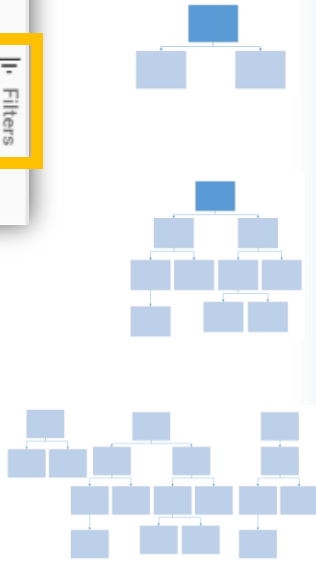
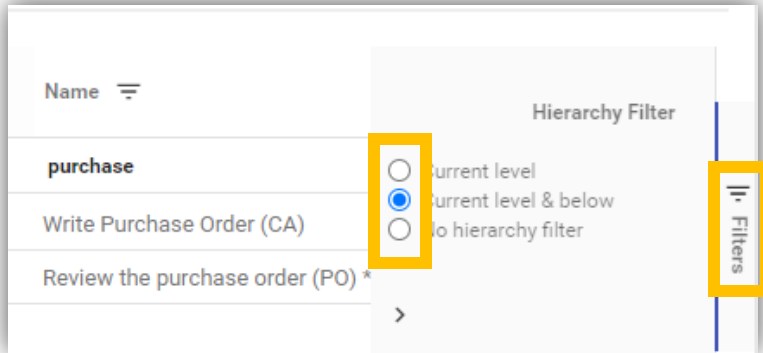
Show: 10 - 25 - 50



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 one level below the object selected in the Tree.
- **Current Level & Below:** Lists all levels below the object selected in the Tree.
- **No Hierarchy filter:** Lists All items in the module 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.

The screenshot shows the 'List Tab' configuration interface. On the left, a sidebar contains a 'Filters' section with a list of checkboxes for various fields: Select Box, Graph, Favorite, Type, Sequence #, Role, Description, Modified Date, Name, Identifier, Subtype, Categories, and Org Units. A yellow box highlights the 'Columns' section in the sidebar. Below the sidebar, there are three buttons: 'Save Columns', 'Save Columns Environment Default', and 'Reset to Default'. On the right, a preview of the list view is shown. A yellow box highlights a 'Type' column header with a drag handle icon. A yellow box highlights a 'Name' column header with a drag handle icon. A yellow box highlights a 'Task' column header with a drag handle icon.

1. Select Box  
2. Graph  
3. Favorite  
4. Type  
5. Sequence #  
6. Role  
7. Description  
8. Modified Date  
9. Name  
10. Identifier  
11. Subtype  
12. Categories  
13. Org Units

4. Save Columns  
5. Save Columns Environment Default  
6. Reset to Default

2. Type  
3. Name  
4. Task

## 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



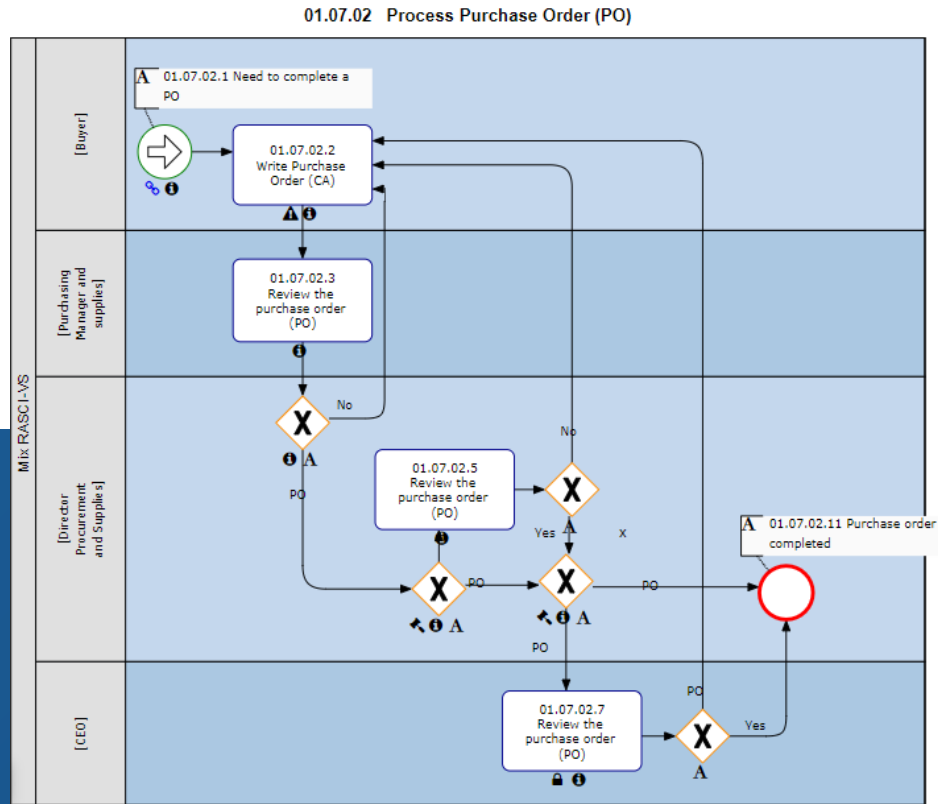
Default column configurations are saved by administrators.



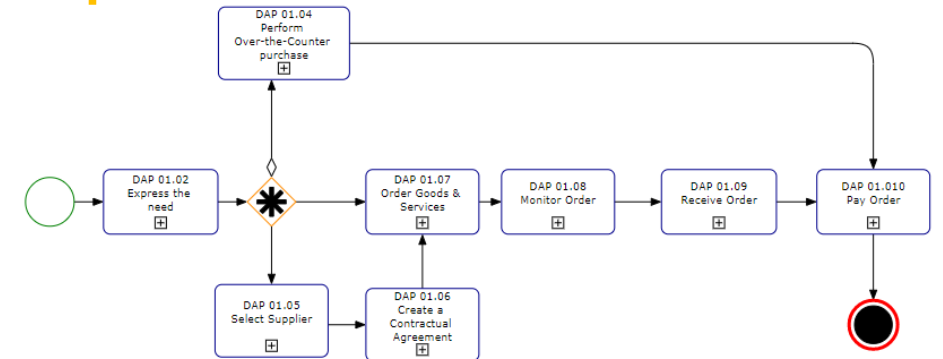
# Graph Settings

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

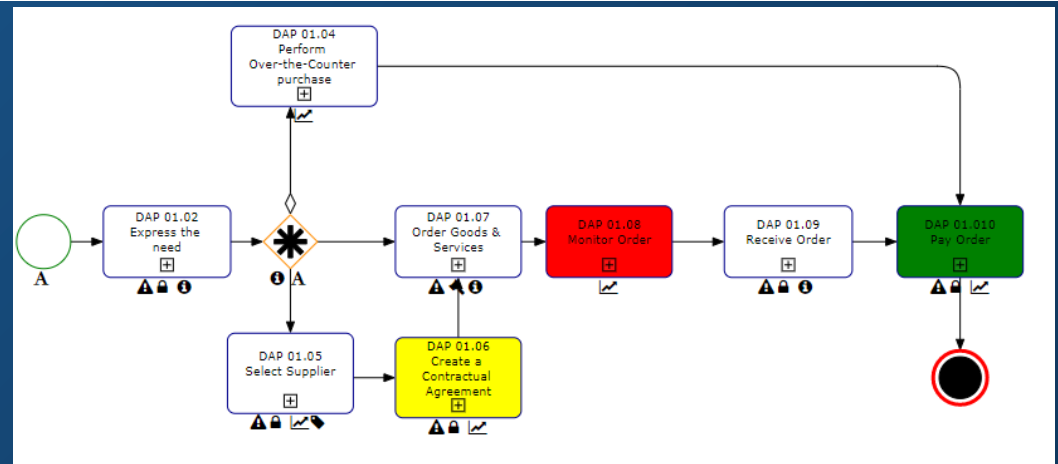
## Swimlane Mode



## Graph Mode – No Icons



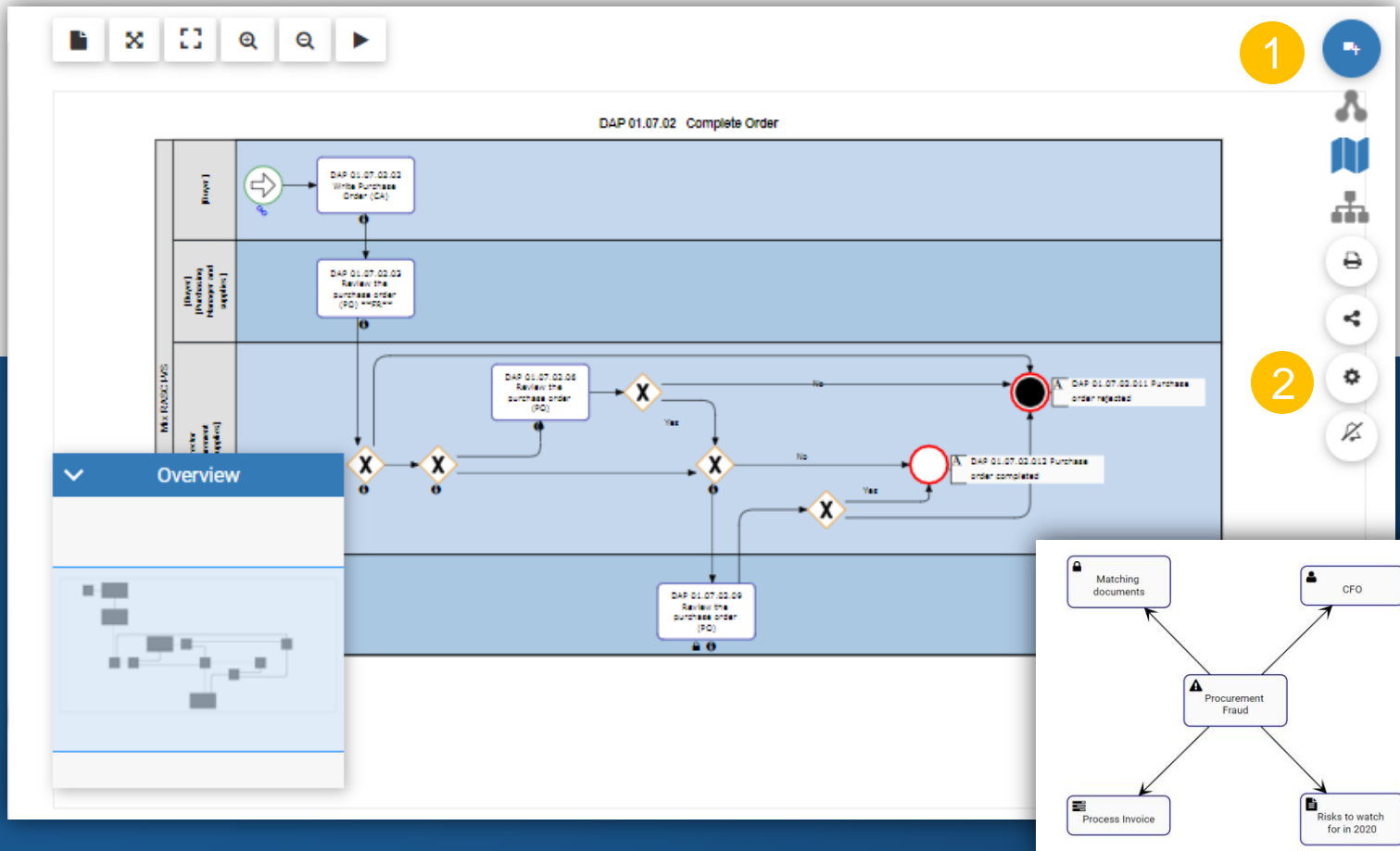
## Graph Mode with Icons and KPI color



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.

M

RASCI-VS Filter

Roles	RESPONSIBLE	▼	Assets	RESPONSIBLE	▼
Resources	RESPONSIBLE	▼	Org Units	RESPONSIBLE	▼

N

Icons & Annotations

Analysis	NONE	▼	Annotation	ANNOTATION	▼
Assets	NONE	▼	Attributes	ICON	▼
Boundary Events	NONE	▼	Categories	NONE	▼

Reset to Default

Close

Save changes

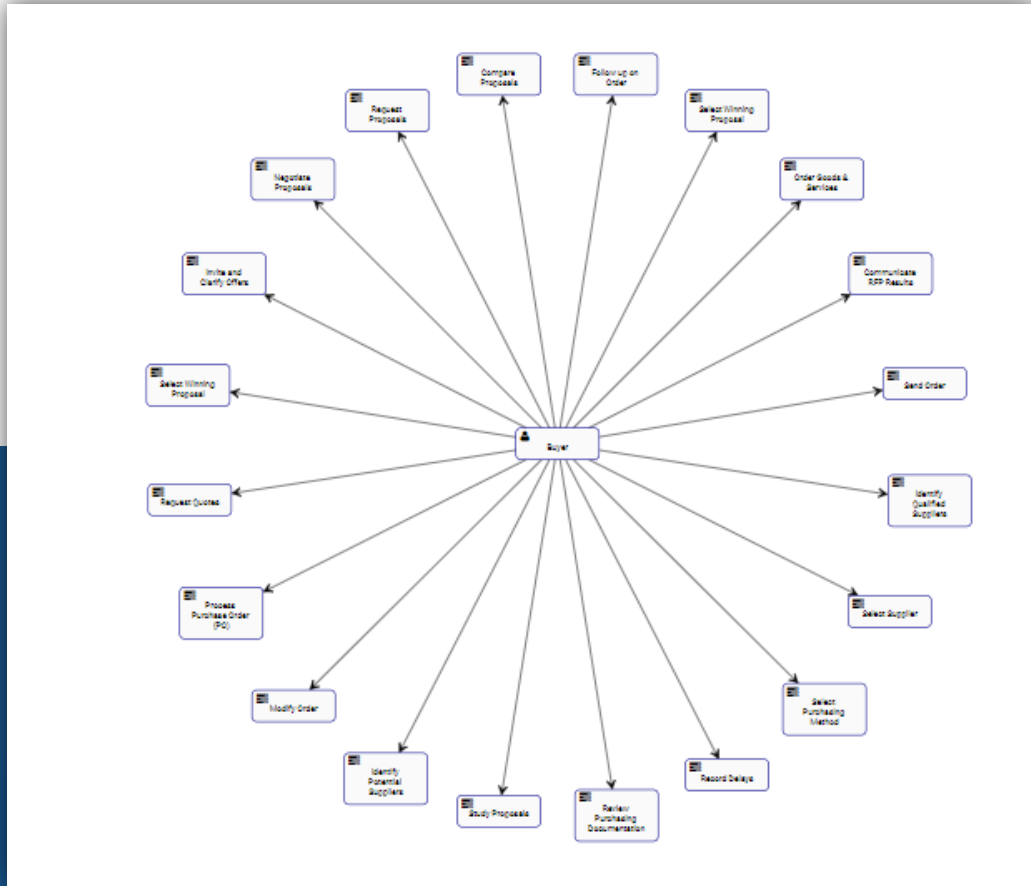
	Purpose
M	Show/Hide roles, org units, resources and assets depending on their RACSul-Vs
N	Show/hide associated objects and choose whether to display them as icons or annotations



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

# Impact Graph Settings

You can configure which impacted objects to include.



### Map options

General

Filter

PROCESS

Select All Deselect All

ORG UNIT

PROCESS ✓

RESOURCE

RISK

ROLE

RULE

SERVICE

SHORTCUT

Reset to Default

Close

Save changes



Use this setting to filter through impacted objects.

# Reset Graph Settings

RASCI-VS Filter

Roles	RESPONSIBLE		Assets	RESPONSIBLE	
Resources	RESPONSIBLE		Org Units	RESPONSIBLE	

Icons & Annotations

Analysis	NONE		Annotation	ANNOTATION	
Assets	NONE		Attributes	ICON	
Boundary Events	NONE		Categories	NONE	

Reset to Default

CloseSave changes

Map options

General

Filter

PROCESS

Select AllDeselect All

ORG UNIT

PROCESS

RESOURCE

RISK

ROLE

RULE

SERVICE

SHORTCUT

Reset to Default

CloseSave changes



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.





# **EPC Basic User Training**

## **Configuration Options**

### **End**