Hopex Power Studio

Technical Article

Hopex Aquila

Bizzdesign

Contents

HOPEX POWER STUDIO INTRODUCTION

Hopex Power Studio desktop is available with **Hopex Power Studio** technical module. It is dedicated to customization.

Hopex Report Studio is part of **Hopex Power Studio**.

- ✓ Prerequisite for any Customization
- ✓ Accessing Hopex Power Studio Desktop
- ✓ Hopex Power Studio Desktop

PREREQUISITE FOR ANY CUSTOMIZATION

Customizations must be performed in a development environment.

Before starting any customization, you must first install the **HOPEX Application Server customization** module.

> ☞ *For detailed information, see **MODULES > Customization Lifecycle Management** documentation.*

ACCESSING HOPEX POWER STUDIO DESKTOP

Customization Dedicated Profiles

You can access **Hopex Power Studio** desktop with *HOPEX Customizer* profile.

HOPEX Customizer profile enables in particular to:

- customize profiles
- customize permissions on object UI and general UI
- customize report definitions
  Although **Hopex Power Studio** and **HOPEX Report Studio** desktops include the same features regarding reporting, you should use **Hopex Customizer Publisher** dedicated profile rather than **Hopex Customizer**
- access reports
- manage custom packaging

For example, when creating Definitions (Report DataSet Definitions, TreeSet Definitions, GraphSet Definitions) you might need to create your own queries:

- **Hopex Customizer Publisher** profile prevents you from getting, in the IntelliSense feature, all administration attributes and links, which are not of interest in that case. Only business related attributes are proposed and thus you do not get a crowded list.
- with **Hopex Customizer** profile, you can still hide administration attributes and links: in **Options > Repository > Metamodel**, clear **Display repository administration properties and links** option.

  ☛ *See Advanced Search Options.*

Logging in to Hopex Power Studio Desktop

You can access **HOPEX Report Studio** desktop with **HOPEX Customizer** profile.

To log in to **Hopex Power Studio** desktop:

❯ See Accessing Hopex with **HOPEX Customizer** profile.
Once logged in, the **Hopex Power Studio** desktop appears and a session is opened.
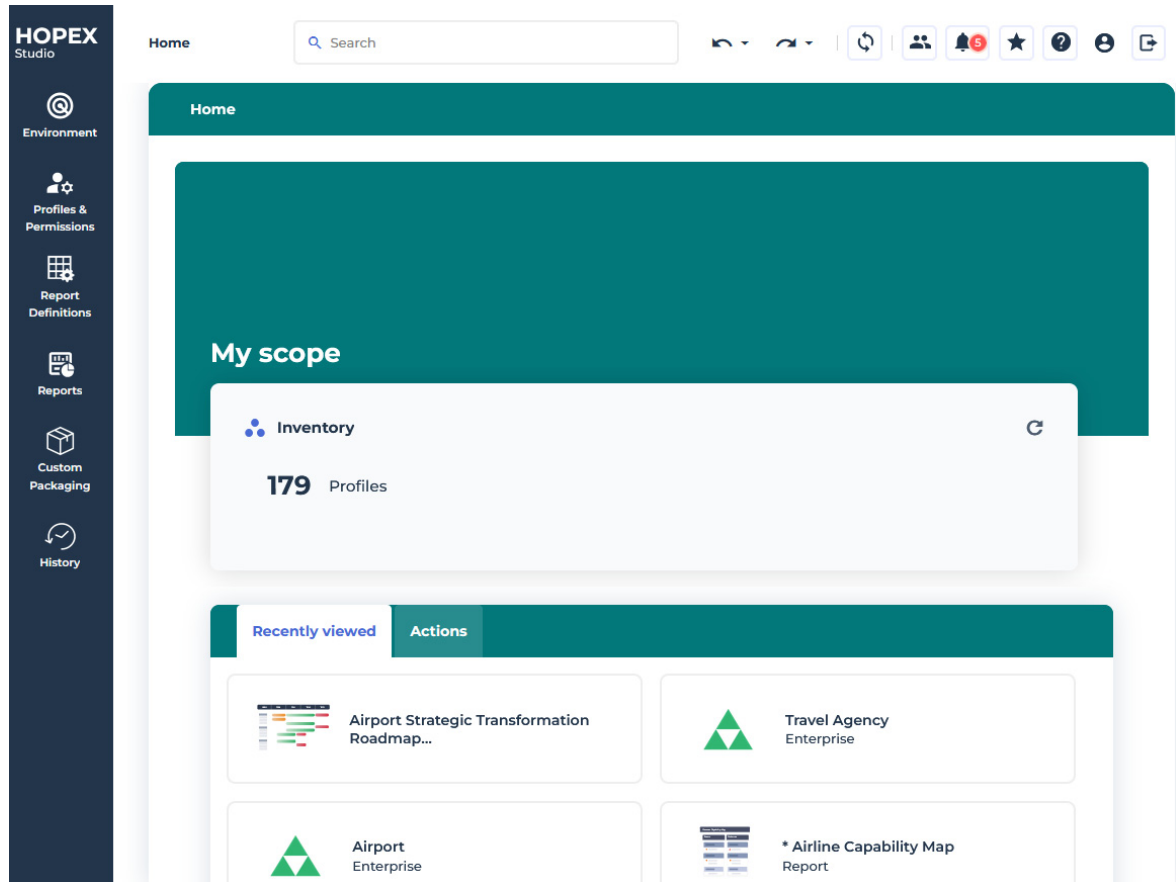
HOPEX POWER STUDIO DESKTOP

The **Hopex Power Studio** desktop includes the standard menus and tools of HOPEX desktops.

☛ *For information regarding HOPEX desktops, see* *Hopex Desktop.*

Hopex Power Studio Navigation Menus

The **Hopex Power Studio** desktop includes the following navigation menus:

- **Environment**: to manage Enterprises and Libraries
- **Profiles & Permissions**: includes all you need to create and customize profiles and their permissions.

    ☛ *See Profiles and Permissions.*

- **Report Definitions**: includes all you need to create and customize Report Templates.
    - **Report Templates**, definitions on which are based the reports
    - **Data Source Definitions**: Report DataSet Definitions,TreeSet Definitions, GraphSet Definitions
    - **Data Sources**: **Report DataSets** and **Queries**

        ☛ *For information regarding reporting, see HOPEX Report Studio documentation.*

- **Reports**: to access and create reports from Report Templates

    ☛ *For information regarding report creation, management and customization, see Common features > Documentation.*

- **Custom Packaging**: to manage your custom packages

    ☛ *For information regarding custom packages, see **MODULES > Customization Lifecycle Management** documentation*

- **History:** for a quick access to all of the objects you have accessed (e.g.: display of their property pages) or modified

    ☛ *For information regarding use of standard navigation menus, see Common features > The HOPEX Web Front-End desktop.*
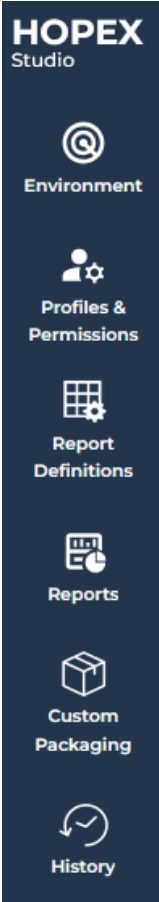
Profiles & Permissions Menu

From the **Profiles & Permissions** navigation menu you can especially access, create and customize profiles:

- **Profiles**

    ☛ *See Profiles.*

- **Permissions** including:

    ☛ *See Permissions to Access UIs.*

    - **Object UI Permissions**

        ☛ *See Managing Permissions on Object UI.*

    - **General UI Permissions**

        ☛ *See Managing Permissions on General UI.*
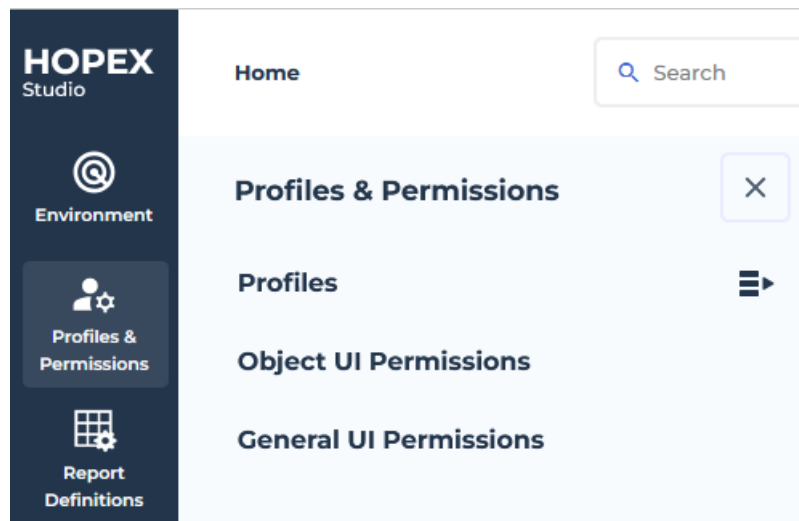
Report Definitions menu

Although **Hopex Power Studio** and **HOPEX Report Studio** desktops include the same features regarding reporting, you should use **Hopex Customizer Publisher** dedicated profile rather than **Hopex Customizer**.

☛ *For detailed information regarding Report Definitions, see HOPEX Report Studio Introduction.*

For example, when creating Definitions (Report DataSet Definitions, TreeSet Definitions, GraphSet Definitions) you might need to create your own queries:

- **Hopex Customizer Publisher** profile prevents you from getting, in the IntelliSense feature, all administration attributes and links, which are not

of interest in that case. Only business related attributes are proposed and thus you do not get a crowded list.

- with **Hopex Customizer** profile, you can still hide administration attributes and links: in **Options > Repository > Metamodel**, clear **Display repository administration properties and links** option.

☞ See *Advanced Search Options.*

Hopex Power Studio Homepage

The **Hopex Power Studio** homepage gives direct access to:

- profiles
- recently viewed objects
- report creation
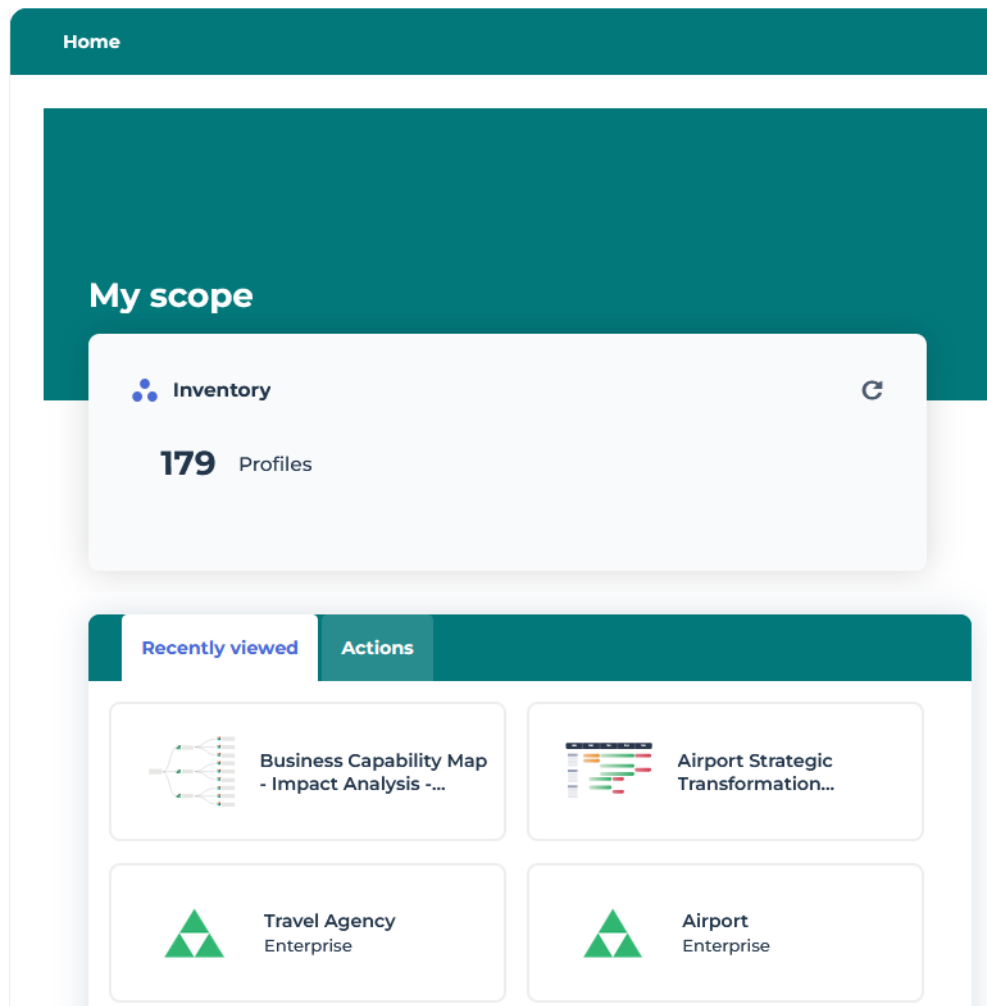
PROFILES AND PERMISSIONS

Managing profiles and permissions to access UI is restricted to **Hopex Customizer** profile.

PROFILES

☛ *Profile creation and customization is restricted to **Hopex Customizer** profile (with **Hopex Power Studio** technical module).*

Profiles are used by **Hopex** Administrators in the **Hopex Administration** desktop, to assign Profiles to persons or person groups.

The following points are covered:

- Introduction to Profiles
- Profile Properties
- Accessing the Profile Management Page
- Configuring a Profile
- Creating and Managing Profiles

Introduction to Profiles

A user access **Hopex** with a specific profile that determines the **Hopex** application and its associated desktop(s).

Profile definition

A profile defines the function of a person or person group in the enterprise.

```
E.g.: EA Functional Administrator, Enterprise Architect
```

☛ *See Accessing the Profile Management Page.*

The profile defines:

- the products accessible

    ☛ *See Products accessible on the license (Command Line).*

    ☺ *The command line of each profile is also described in the **Platform - Concepts > Profiles** documentation.*

    💣 **If a user already has restricted access rights to products (see Viewing the Characteristics of a Login), the products accessible to this user are at the intersection of the values of the Command Line attribute of the user login and profile.**

- the desktops to which the user can access

    ☛ *See Connection diagram.*

- the UI access rights (permissions) of the user

    ☛ *See Permissions to Access UIs.*

- the same options for all the users logged in with this profile

    ☛ *See Options.*

Profile assignment

The Hopex Administrator (or an Hopex Administrator of a Solution) must assign each person at least one profile so that this person can access **Hopex**.

Assigning a profile to a person or a person group defines:
- the repository concerned by the assignment
- the data (reading, writing) access rights of the person with this profile assignment
- (optional) the validity period of the assignment

☛ See *Assigning a profile to a person.*

☛ See *Assigning a profile to a person group.*

Connection diagram

Using a Working Environment Template (WET) enables to homogenize the display of the desktops.

☛ *For detailed information regarding the WET creation, see **Platform - Customization (Windows) > customizing the User Interface > Versatile Desktop** documentation.*

To access **Hopex**, a person must have:
- a login
- at least one profile assigned
  At least one WET (with one or several associated desktops) must be assigned to the profile. A desktop manager enables to define the desktops associated with this WET-profile assignment.

☞ *See Assigning a WET to a profile.*
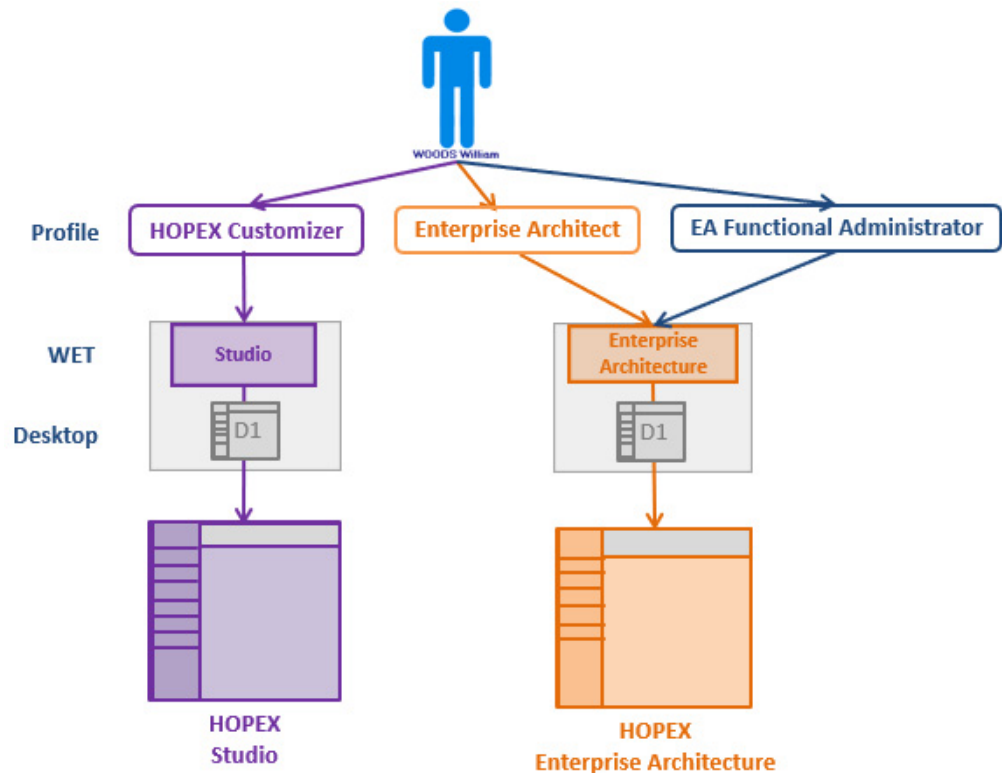
In the above example, William WOODS has an active login. He can access:
- **Hopex Studio** with the **Hopex Customizer** profile.
- **Hopex Enterprise Architecture** with the **Enterprise Architect** profile or with the **EA Functional Administrator** profile.

Profile Properties

A profile enables definition of the same connection parameters and rights to a set of users.

☞ *See Profile Description.*

Name

The **Name** of a profile can comprise letters, figures and/or special characters.

Products accessible on the license (Command Line)

☛ *Hopex Administrator profile can also modify this field.*

☺ *The command line of each profile is described in the **Platform - Concepts > Profiles** documentation.*

The **Command Line** field enables definition of products that can be accessed by users with the current profile.

Format of the command is:

/RW'<accessible Product A code>;<accessible Product B code>;<...>'

For example: you have licenses for products **Hopex Business Process Analysis, Hopex IT Portfolio Management** and other **Hopex** products. To authorize only **Hopex Business Process Analysis** and **Hopex IT Portfolio Management** modules to users that have this profile, enter:

/RW'HBPA;APM'

☛ *To know the product code, see the online documentation: **Platform - Concepts > Products**.*

💣 **If a user already has access rights restricted by the Command Line attribute on his/her Login (see Viewing the Characteristics of a Login), the products accessible to this user are at the intersection of values of the Command Line attribute of the user login and profile.**

	Command Line	**Profile 1** **/RW'APM'**	**Profile 2** **none**
User A	/RW'APM;HBPA'	user A has access to **Hopex IT Portfolio Management**	user A has access to: **Hopex IT Portfolio Management** and **Hopex Business Process Analysis**
User B	/RW'HBPA'	user B cannot access any product	user B has access to **Hopex Business Process Analysis**
User C	none	user C has access to **Hopex IT Portfolio Management**	user C can access all of the products for which he has the license (**Hopex IT Portfolio Management** and **Hopex Business Process Analysis**)

Restrictions on products for users and profiles that have licenses for Hopex IT Portfolio Management and Hopex Business Process Analysis.

Profile display

A profile is provided by default at connection when it is not included in another profile.

The **Profile Display** attribute defines when the profile is provided at connection:
- "Always": the profile is provided at connection even if it is included in the definition of another profile,
- "If not included in another profile" (default value): the profile is provided at connection only if it is not included in another profile.

Profile status

☛ *Hopex Administrator profile can also modify this field.*

The **Profile Status** attribute is used to define the profile as inactive if necessary.
- "Active": the profile can be assigned and is provided at connection
- "Inactive": the profile cannot be assigned and is not provided at connection.

By default, at creation the **Profile Status** value is "Active".

Description

The **Description** field is used to describe the profile.

Administrator profile

💣 **For security reasons, Hopex Customizer cannot modify this field. It is restricted to Hopex Administrator profile.**

The **Administrator Profile** attribute defines the administration level of profiles.
- "Yes" defines the highest level of administration profile (like **Hopex Administrator** profile). It authorizes to:
  - assign an administrator profile to another user.
  - define a profile as administrator.

  That is, specify "Yes" value for the **Administrator Profile** attribute of any profile.

    ☛ *See HOPEX Administrator profile.*
- "Functional" defines a functional administration profile.

    ☛ *See Functional Administrator profile of a Solution.*
- "No" (default value) defines a profile that cannot perform any of the actions dedicated to administration profiles.

Assignable

The **Assignable** attribute defines if the profile is assignable to a Login or not.

This attribute enables filtering of profiles and improves visibility of profiles to be assigned.

By default at creation, the **Assignable** value is "No".

Covered domain

Covered Domain defines the domain covered by the profile. This domain defines in particular certain elements of the profile desktop homepage and diagram types proposed in the diagram creation wizard. The same **Covered Domain** can be used by several profiles.

Persons and Person Groups

The **Persons** and **Person Groups** pages list all the persons or person groups to whom the current profile is assigned.

Available types

The **Available Types** page enables definition of the specific objects available for the profile:
- Business Document Pattern
- Document category
- Report DataSet Definition
- Widget

☛ *See Defining the object available for a profile.*

Accessing the Profile Management Page

In **Hopex Studio**, the **Profiles & Permissions** navigation menu enables management of **Profiles**.

☺ *For a direct access to profiles, from Hopex Studio homepage, Inventory indicators, click Profiles.*

To access the **Profiles** management page:

1. Access **Hopex Studio** desktop (with **Hopex Customizer** profile).

☛ *See Accessing Hopex Power Studio Desktop.*

2. Click the **Profiles & Permissions** navigation menu.
   The **Profiles & Permissions** management sub-menus appear.
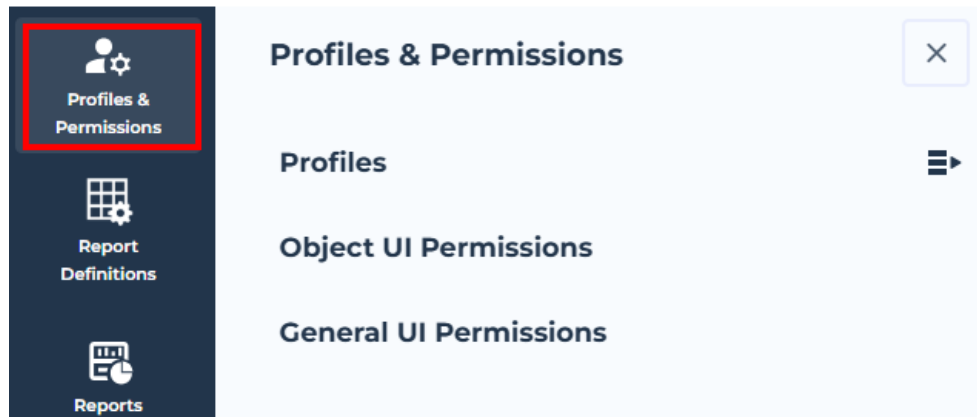
3. Select the **Profiles** sub-menu.

Viewing the Profile Properties

Hopex Customizer profile has access to all the profile properties (**Hopex Administrator** profiles have access to their main characteristics only).

To view a profile properties:

1. Access the **Profiles** management page.

   ☛ See *Accessing the Profile Management Page.*

2. In the edit page, click the profile name.

☺ *Use the list filtering tool to access the profile.*

The profile property pages display its complete **Characteristics** page.

☛ *See Profile Properties.*

Process Functional Administrator
🔹 Profile

| ‹ | General ⌄ | Characteristics | | › | | ⊞ Customize ⌄ | ⋮ |

Name*

> Process Functional Administrator

Command Line

> /RW'HBPA,HCJ,ERML,SUP,PPM,HSIM,BCM' /RO'DMO,ARC,SOIA,HITA'

Profile Display

> Always ⌄

Profile Status

> Active ⌄

Administrator Profile

> Functional ⌄

Assignable

> Yes ⌄

_GUIName

> Process Functional Administrator

Set of UI Access Rights

> Process Functional Administrator ›

Covered Domain

> Business Process Analysis ›

Homepage Report

☛ *See Configuring a Profile.*

Configuring a Profile

☛ *Profile customization is restricted to **Hopex Customizer** profile.*

Characteristics

In the **Characteristics** page of the profile you can define:

☛ *See Profile Properties.*

- the products accessible to users with the current profile (**Command Line**)

  ☛ *As a **Hopex Administrator** you can also modify the **Command Line** definition.*

- whether the profile is
  - available at connection (**Profile Display**)
  - active or not (**Profile Status**)

    ☛ *As a **Hopex Administrator** you can also modify this **Profile Status** value.*

  - **Assignable** or not
  - an **Administrator Profile** or not

    💣 **As a Hopex Customizer you cannot modify the Administrator Profile field. This action is restricted to a profile with Administrator Profile value set to "Yes", like Hopex Administrator profile.**

- ***Interface***
  - the profile display name in the interface (**_GUIName**)
  - the profile icon in the interface (**MetaPicture**)
- ***Options***
  - the options at profile level

    ☛ *See Modifying options for a profile.*

- ***Homepage***
  - the **Homepage** defining the homepage blocks for the current profile
  - the homepage header definition: **Covered Domain** (can be used by several profiles)
  - the default **Homepage Report** displayed on the homepage associated with the current profile

    ☛ *See Defining a default report on the homepage.*

Desktops

- the **Working Environment template (WET)** page defines the desktops to which the users of the profile have access.

  ☛ *See Assigning a WET to a profile.*

Objects

- (If needed) the **Terminology** page defines the Terminologies associated with the profile.

  ☛ *See Associating a terminology with a profile.*

- object types available.

  ☛ *See Defining the object available for a profile.*

You can also:

- customize profile UI access

  ☛ see *Customizing the permissions of an existing profile.*

- check that the profile complies with the connection regulation

  ☛ See *Checking profile compliance with connection regulation.*

Configuring profile characteristics

To configure a profile characteristics:

1. Access the properties of the profile.
   The **Characteristics** page displays.

   ☛ See *Viewing the Profile Properties.*

2. (Optional) In the **Command Line** field, enter the command defining products that can be accessed by users with the current profile.

   ☛ See *Products accessible on the license (Command Line).*

3. (If needed) In the **Profile Display** field, modify the value.

   ☛ *By default, the profile is provided at connection only if not included in another profile.*

   ☛ See *Profile display.*

4. (Optional) In the **Profile Status** field, modify the attribute value.

   ☛ *By default, the profile is active.*

5. (If needed) To modify the **Administrator Profile** field value, ask **Hopex Administrator** to perform the action, see *Configuring a Profile*.

   ☛ *By default, the profile is not an administrator type profile.*

   ☛ See *Administrator profile.*

6. (If needed) In the **Assignable** field, modify the attribute value.

   ☛ *By default, the profile is not assignable.*

   ☛ See *Assignable.*

7. (Optional) In the **Homepage Report** field, connect a report to the profile homepage.

   ☛ See *Defining a default report on the homepage.*

8. (Optional) In the **_GUIName** field, enter the profile name displayed in the interface.

9. (Optional) In the **MetaPicture** field, click the arrow and select **Connect MetaPicture**.
   - In the search field, enter the characters you want to find and click **Find**.
   - In the results list, select the icon and click **Connect**.

Assigning a WET to a profile

☛ *To see the connection diagram, see Connection diagram.*

☛ *For more details on the WET creation and its use with profiles, see* **Platform - Customization (Windows) > Customizing the user interface > Versatile Desktop**.

To complete the profile configuration, you must assign a WET to the profile and define the desktop associated with this WET assignment:

- the desktop ("Universal Desktop V6") defines the layout of the desktop (containers)
- the WET defines the content of the desktop

The **Local name** of the WET assignment to the profile is automatically filled according to your configuration in the following format:

       <Profile name>/<WET name>/<Desktop name>

You may define a **Name** to this assignment.

To assign a WET to a profile (standard version):

1. Access the properties of the profile.

       ☛ *See Viewing the Profile Properties.*

2. Display its **Working Environment Template Assignments** page.
3. Click **New** ➕.
4. In the **Assigned WET** field, select the WET you want to assign to the profile.
   The assigned WET is automatically added to the **Local Name**.
5. Keep the desktop selection mode: **Direct selection of desktop**.
6. In the **Assigned Desktop** field, select the desktop you want to assign to the profile.
   The assigned Desktop is added to the **Local name**.

7. (Optional) To name this assignment, click **Next** and enter a **Name**.

8. Click **OK**.
The selected WET is assigned to the profile and its associated layout is defined.

Modifying options for a profile

To modify a profile options:
1. Access the **Profiles** management page.

   ☛ See *Accessing the Profile Management Page.*

2. In the edit area, select the profile concerned.

   ☺ *You can use the list filtering tool to find the profile.*

3. In the list menu bar, click **Options**.
   The profile **Options** window pops up.
4. In the **Options** tree, expand the corresponding folder and in the right pane modify the option concerned.
5. Click:
   - **Apply** to validate your modifications and keep the **Options** window open.
   - **Ok** to validate your modifications and close the **Options** window.
   Options are modified for this profile.

Defining a default report on the homepage

You can define a default report on the homepage associated with the profile, for all the users connected with the current profile.

Each user can change this report.

To define a default report for a profile homepage:
1. Access the properties of the profile.

   ☛ See *Viewing the Profile Properties.*

2. In the **Characteristics** page, click the **Homepage report** arrow and select **Connect**.
3. Select the report and click **Connect**.
   The report is linked to the profile desktop homepage.

Associating a terminology with a profile

   📖 *A Terminology defines a set of terms used in a specific context instead of the standard term.*

   ☛ *For information on creating and managing a Terminology, see* **Hopex Power Studio - Renaming Hopex Concepts.**

To associate a terminology with a profile:
1. Access the properties of the profile.

   ☛ See *Viewing the Profile Properties.*

2. Display its **Terminology** page.

3. Click **Connect** 🔗.
   The terminology search tool appears.
4. (Optional) In the second field, enter the characters to search for.

5. Click **Find** 🔍 .
6. In the search results, select the terminology you want to connect.

☞ *You can select several terminologies.*

7. Click **Connect**.
The terminology is associated with the profile.

If you associate more than one terminology with the profile, you must define an order of priority for them.

To define the priority of the terminologies of a profile:

1. Access the properties of the profile.

☞ *See Viewing the Profile Properties.*

2. Display the **Terminology** page.

3. In the toolbar, click **Reorganize** ⊑Ξ .

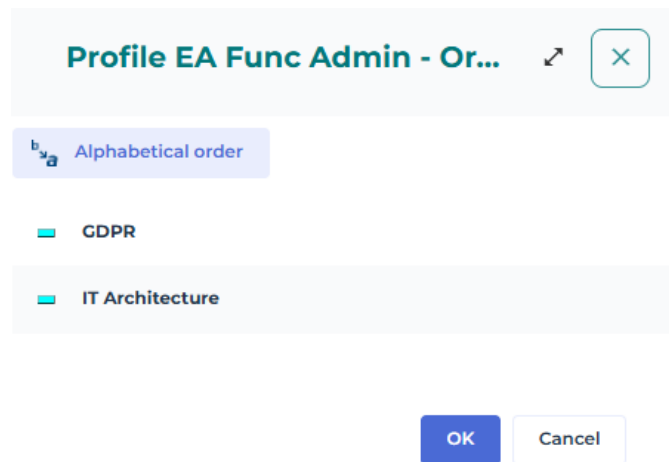4. Drag and drop the priority terminology at the top.

Profile EA Func Admin - Or... ↗ ☒

ᵇ𝄾ₐ Alphabetical order

▭ GDPR

▭ IT Architecture

OK   Cancel

```
In the example above, the terms of the IT Architecture
terminology are used when they are not defined in the GDPR
terminology.
```

Defining the object available for a profile

You can define which specific object are available for a profile:

• Business Document Pattern
• Document category
• Report DataSet Definition
• Widget

To define the object available for a profile:

1. Access the properties of the profile.

☞ *See Viewing the Profile Properties.*

2. In the **Available Objects** page, expand the folders.

3. In the toolbar, click **Connect** 🔗 .
4. The object type search tool appears.
5. (Optional) In the search tool, in the first field, select the object type category.
6. (Optional) In the second field, enter the characters to search for.
7. Click **Find** 🔍 .
8. In the search result, select the object types to make available for the profile.
9. Click **Connect**.
    The object types selected are made available for the profile.

Creating and Managing Profiles

The following points are covered:

*   Checking profile compliance with connection regulation
*   Customizing the permissions of an existing profile
*   Customizing the characteristics of an existing profile / Creating a profile from an existing profile
*   Creating a profile
*   Deleting a profile

Checking profile compliance with connection regulation

A profile must comply with modeling regulation.

To check that the profile complies with the connection regulation:

1. Access the **Profiles** management page.

    ☛ See *Accessing the Profile Management Page*.
2. In the **Profiles** list, right-click the profile concerned and select **Manage > Check > Regulation with propagation**.
3. Select **Connection regulation**.
4. Click **OK**.
    The connection regulation report for the selected profile is displayed.

Customizing the permissions of an existing profile

MEGA provides profiles adapted to each Solution or product. However, you might need to customize the permissions (UI access) of these profiles. For this purpose **MEGA** recommends you to create a **Set of UI Access Rights** from the **Set of UI Access Rights** of the profile concerned, then to customize it.

To customize the permissions of a profile:
1. Access the properties of the profile.
    ☛ See *Viewing the Profile Properties.*

Process Functional Administrator
🔖 Profile

Characteristics ∨	▦ Customize ∨	⋮

Name*

Process Functional Administrator

Command Line

/RW'HBPA,HCJ,ERML,SUP,PPM,HSIM,BCM' /RO'DMO,ARC,SOIA,HITA'

Profile Display

Always   ∨

Profile Status

Active   ∨

Administrator Profile

Functional   ∨

Assignable

Yes   ∨

_GUIName

Process Functional Administrator

Set of UI Access Rights

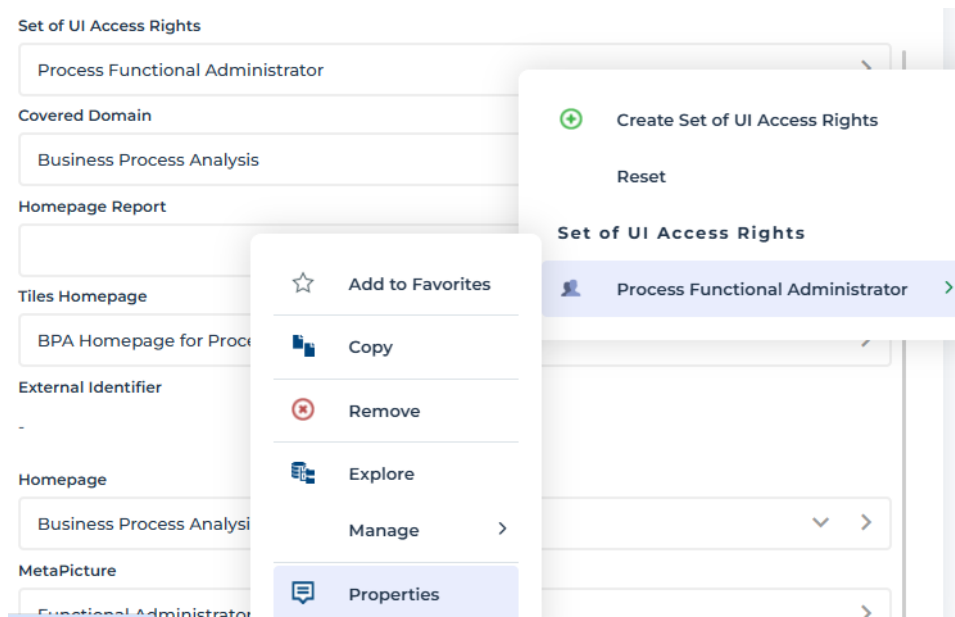Process Functional Administrator   >

Covered Domain

Business Process Analysis   >

2. In the **Set of UI Access Rights** field, click the arrow and access its **Properties**.

3. In the **Characteristics** page, click the arrow of the **Customizing Set of UI Access Rights** and select **Create Set of UI Access Rights**.

The name format of the Set of UI Access Rights is predefined as:

```
<Name of the Set of UI Access Rights of the profile
concerned> (Custom)
```

Creation of Set of UI Access Rights -... ↗ ✕

Local name*

Process Functional Administrator (Custom)

Used Set of UI Access Rights

The Set of UI Access Rights list is not populated yet.
To populate the list, click:

🔗 Connect

OK   Cancel

4. (If needed) Modify its **Name**.

5. Click **OK**.
The set of UI access rights you created is predefined with the same UI access rights as those defined for the profile concerned.

6. Customize the permissions of the set of UI Access rights you just created.

☞ See *Managing Permissions on Object UI* and *Managing Permissions on General UI* and in the **Access Rights** field select the Set of UI access rights you just created.

Customizing the characteristics of an existing profile / Creating a profile from an existing profile

MEGA provides profiles adapted to each Solution or product. However, you may need to customize the characteristics of a profile provided by **MEGA** (for example connect a terminology).

☺ *To customize a profile provided by MEGA, MEGA recommends to create a profile and base its Set of UI access rights on those of the profile you want to customize.*

To customize the characteristics of a profile provided by **MEGA**:

1. Create a profile and configure its **Set of UI Access Rights** by aggregating the set of UI access rights of the profile on which is based your profile.

   ☛ See *Creating a profile.*

2. Configure the profile.

   ☛ See *Configuring a Profile.*

Creating a profile

☛ *Profile creation is only available with the **Hopex Power Studio** technical module (MTS2).*

Users with the same profile share common characteristics (e.g.: options, authorized products, UI access rights).

To create a profile you must define:

- its name
- its set of UI access rights

   ☛ *Defining UI access rights might be tricky. To facilitate the definition, you can use one (or several) **Set of UI access rights** already defined.*

   The set of UI access rights created inherits from all of the permissions defined on the Sets of UI access rights you have connected to it.

- its characteristics

   ☛ *At creation a profile is not assignable, do not forget to set **Assignable** to "Yes" when its configuration is ready.*

- its assigned WET

   ☛ *For detailed information on a WET, see **Customization (Windows) > Customizing the User Interface > Versatile Desktop >Using a Working Environment Template documentation**.*

To create a profile:

1. Access the **Profiles** management page.

   ☛ See *Accessing the Profile Management Page.*

2. In the **Profiles** page, click **New** ➕.
3. In the profile creation window, enter the **Name** of the profile.

   ☛ *By default the **Name** of the profile is created in format "Profile-x" (x is a number that increases automatically).*

4. In the **Set of UI Access Rights** field, click the arrow and select **Create Set of UI Access Rights**.

5. In the **Name** field, enter a name for the Set of UI access rights of the profile.

6. (Optional, to use one or several Sets of UI access rights already defined)

Click **Connect** 🔗:

- (Optional) In the search field, enter the character string to be searched for.

- Click **Find** 🔍 .

- In the list, select the Set of UI access rights on which you want to base the Set of UI access rights of your profile.

  ☛ *You can select several Sets of UI access rights.*

  The set of UI access rights you are creating inherits from the permissions defined on all the sets of UI access rights you connected to it.

- Click **Connect**.

7. Click **OK**.
The new profile is listed in the **Profiles** page.

8. Configure the profile characteristics.

  ☛ *See To configure a profile characteristics:.*

  `E.g.: in the` **Characteristics** `page, set the` **Assignable** `parameter to "Yes", and connect a` **Tiles Homepage.**

9. Assign a WET to the profile.

  ☛ *See Assigning a WET to a profile.*

10. (If needed) Define the Set of UI access rights of the profile.

  ☛ *See Managing UI Access (Permissions).*

Deleting a profile

You may want to delete a profile you created.

💣 **If you delete a profile that is the only profile assigned to a person, this person can no longer access Hopex.**

To delete a profile:

1. Access the **Profiles** management page.

  ☛ *See Accessing the Profile Management Page.*

2. In the list, select the profile concerned.

  ☛ *You can select several profiles.*

3. In the list menu bar, click **Remove** ⊖ .

4. The selected profiles are removed and

PERMISSIONS TO ACCESS UIs

Introduction to Permissions

Prerequisites and definitions

Profile

Managing permissions to access UI is restricted to **Hopex Customizer** profile.

Permissions

Permissions (or access rights) of a **Profile** are defined by its associated **Set of UI access rights**.

You can manage:

- object UI Permissions

  📖 *Object UI permission defines user rights on creation, reading, update, and deletion on these objects and their tools. By default, object UI permissions have *CRUD value (C: create, R: read, U: update, D: delete, *: default value).*

  ☛ *For information on management of workflow UI accesses, see the Hopex Power Studio > Customizing Workflows > Managing permissions on Workflows documentation.*

- general UI Permissions

  📖 *General UI permission defines if tools are available or not. By default, general UI accesses have *A value (A: Available, *: default value).*

Performance

For optimum performance, after modifying permissions you must compile the permissions.

☛ *Permission compilation is recommended in a production environment, see the Hopex Administration > Managing Environments > Compiling an environment documentation.*

Accessing the Permissions management pages

The **Profiles & Permissions** navigation menu enables management of UI access for the complete environment and for each Set of UI access rights:

- **Object UI Permissions** details its access to UI of objects and its access to tools specific to these objects.

  ☛ See *Object UI Permision Values.*

  ☛ See *Managing Permissions on Object UI.*

- **General UI Permissions** details its access to general UIs.

  ☛ See *Object UI Permision Values.*

  ☛ See *Managing Permissions on General UI.*

To access the Permissions management pages:

1. Log in to the **Hopex Studio** desktop with the **Hopex Customizer** profile.

   ☛ *See Logging in to Hopex Power Studio Desktop.*

2. Click the **Profiles & Permissions** navigation menu.
   The **Profiles & Permissions** management sub-menus appear.
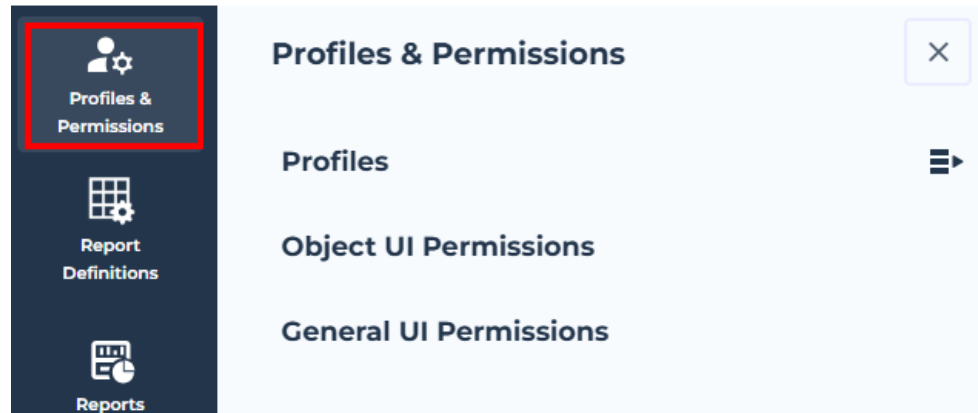
3. Select the sub-menu:
   - **Object UI Permissions** to manage access to object UI
   - **General UI Permissions** to manage access to general UI

Object UI Permision Values

Object UI Permissions enable definition of user permissions on the selected metamodel.

- Preceding the value of a permission, the character:
  - * indicates that the value is directly inherited from the default value.
  - - indicates that the value is inherited from an element hierarchically higher in the same profile or sub-profile.
- Empty value means that the user has no permission on the element. The element is not visible to the user.
  When a MetaClass is hidden to a user, it is not available in the repository.

      For example, if the "Package" MetaClass is hidden for a
      user, this user cannot use packages in modeling work since
      this object type is not accessible in the interface.

Permissions on MetaClass occurrences

By default, the permission on occurrences of a MetaClass takes *CRUD value:
- C: Create
- R: Read
- U: Update
- D: Delete
- S: available in the quick Search tool

A permission on occurrences of a MetaClass can take combinations of values:
- **RS**: read and search occurrences of the MetaClass
- **CRUS**: create, read, update, and search occurrences of the MetaClass
- **CRUDS**: create, read, update, delete, and search occurrences of the MetaClass
- **RUS**: read, update, and search occurrences of the MetaClass
- **RUDS**: create, read, update, delete, and search occurrences of the MetaClass
- **R**: read occurrences of the MetaClass
- **CRU**: create, read and update occurrences of the MetaClass
- **CRUD**: create, read, update and delete occurrences of the MetaClass
- **RU**: read and update occurrences of the MetaClass
- **RUD**: create, read, update and delete occurrences of the MetaClass
- <empty>: the MetaClass is not available

Permissions on a MetaAssociationEnd

By default, the permission on a MetaAssociationEnd takes *CRUD value:
- C: Connect
- R: Read
- U: Update
- D: Disconnect
- M: Mandatory

A permission on a MetaAssociationEnd can take combinations of values:
- R
- CRU
- CRUD
- RU
- RUD
- <empty>: the MetaAssociationEnd is not available

Permissions on a MetaAttribute

By default, the permission on a MetaAttribute takes *RU value.
- R: Read
- U: Update
- M: Mandatory

A permission on a MetaAttribute can take combinations of values:

- R: the MetaAttribute is visible
- RU: the MetaAttribute is visible and modifiable
- RUM: the MetaAttribute is visible, modifiable and mandatory
- <empty>: the MetaAttribute is not available

Permissions on a tool

A tool can be available or not.

By default, availability on a tool is: *A.

The permission on a tool can take value:

- A: the tool is available
- <empty>: the tool is not available

Managing Permissions on Object UI

☛ *For information on management of accesses to user interface workflows, see the* ***Hopex Power Studio - Workflows*** *guide.*

The UI access rights (permissions) of a profile are defined by its associated Set of UI access rights.

For a new Set of UI access rights, by default its access permissions on an object are:

- inherited from the access permissions defined on the Set(s) of UI access rights it uses.

   ☛ *See:*

   - Customizing the permissions of an existing profile and

   - Customizing the characteristics of an existing profile / Creating a profile from an existing profile.

   ☛ *See also Rules on permissions while aggregating Sets of UI access rights.*

   For example the "Process Functional Administrator" Set of UI access rights (of the **Process Functional Administrator** profile) inherits from the permissions defined on the "Action Plan Manager", "Demand Creator", "Project Portfolio

Manager", and "User Management Administrator" Sets of UI access rights.

Process Functional Administrator
👤 Set of UI Access Rights

| General ⌄ | Characteristics | Texts | ⚙ | ⋮ |

Name*

Process Functional Administrator

Used Set of UI Access Rights

[⊆ Reorganize]   [📄 Instant Report ⧉]   [⋮]   ▼

	Local name	External Identifier	Customizing Set of UI Access Rights
👤	Action Plan Manager		
👤	Demand Creator		
👤	Project Portfolio Manager		
👤	User Management Administrator		

« ‹ | Page [1] of 1 | › » | ↻ | Show [50] ⌄ elements   Displ

Customizing Set of UI Access Rights

[›]

External Identifier

-

- • Inherited from the permissions defined by default (<Hopex default>), if it does not use any Set of UI access rights.
   ☞ See *Creating a profile.*

In the **Object UIs** page:

- the **Access Rights** field enables to select the **Set of UI access rights** for which you want to view or modify the permissions.
- the **MetaModel** field enables filtering of MetaClasses displayed in the **MetaClass** frame according to the selected MetaModel.
  - "All" value lists all existing MetaClasses.
  - value Extensions lists all MetaClasses that are not stored in standard Metamodels (MEGA Products products)

To define access permissions on objects, see:

- Modifying access permissions on occurrences of a MetaClass.
- Modifying access permissions on MetaAttributes of a MetaClass.
- Modifying access permissions on tools of a MetaClass.
- Modifying access permissions of a link around a MetaClass.
- Modifying access permissions on links around a MetaClass.

Modifying access permissions on occurrences of a MetaClass

To modify access permissions on occurrences of a MetaClass:

1. Access the UI access management pages and select the **Object UI Permissions**.

   ☞ See *Accessing the Permissions management pages.*

2. in the **Access Rights** field, use the drop-down menu to select the Set of UI access rights.

    ☞   *<Hopex Default> defines default access permissions of each MetaClass, MetaAttribute, MetaAssociationEnd and tool.*

3. In the **MetaModel** field, select the MetaModel concerned.
    In the **MetaClass** frame, the listed MetaClasses are filtered according to the selected MetaModel.

    ☞   *By default **Concrete MetaClasses** are displayed, click **Abstract MetaClass*** ⬒ *to display abstract MetaClasses.*

Object UIs

Access Rights:*	👤 Process Functional Administrator (Custom)	⌄

MetaModel:*	📁 HOPEX Business Process Analysis	⌄

MetaClass

⬒ ⬒   ▼

	Name ↑	Permission	
⚙	**Action (Action Plan)**	*CRUD	
🔀	**Action Plan**	CRUD	
🏭	**Application**	CRUDS	
🔗	**Application System**	CRUD	
🎓	**Assessment Campaign**	CRUD	
📅	**Assessment Session**	CRUD	
🟦	**BPMN Data Store Read Association**	*CRUD	

---

4. In the **MetaClass** frame, select the MetaClass for which you want to modify configuration of access permissions.

    ☞   *By default, its configuration is that inherited from <Hopex Default>.*

5. In the **Permission** field, enter the new value.

☛ *See Permissions on MetaClass occurrences.*

6. Press "Enter".
The value of the MetaClass permission is modified.

In the **MetaAttributes/MetaAssociationEnds/Tools** frame, the values of permissions of elements of the MetaClass are also modified.

☛ *To return to the default value of the permission on the MetaClass, enter the character *.*

MetaClass

Name ↑	Permission	
☐ Operation	CRUDS	
Operational Service Taxonomy	*CRUD	
Org-Unit	*	

☺ *To obtain information on inheritance of the value, enter the character ?.*

MetaClass

Name ↑	Permission	
☐ Operation	CRUDS	
Operational Service Taxonomy	*CRUD	
Org-Unit	?	

Help

Profile :Project Portfolio Manager
Perspective :(Default)
Org-Unit :CRUDS
Meta permission for 'Org-Unit' : CRUD

Licence and CommandLine permission for 'Org-Unit' : CRUDS

OK

For example here:

The permission of **Process Functional Administrator (Custom)** on the **Org-Unit** MetaClass is inherited from the Set of UI Access Rights **Project Portfolio Manager**: CRUDS.

The permission of the **Org-Unit** MetaClass is CRUD, the command line of the **Process Functional Administrator** profile for the **Org-Unit** MetaClass is not restrictive: CRUDS.

You can also modify the MetaAttributes/MetaAssociationEnds/Tools of a MetaClass, see:

- Modifying access permissions on MetaAttributes of a MetaClass.
- Modifying access permissions on tools of a MetaClass.
- Modifying access permissions of a link around a MetaClass.
- Modifying access permissions on links around a MetaClass.

Modifying access permissions on MetaAttributes of a MetaClass

To modify access permissions of MetaAttributes of a MetaClass:

1. Access the UI access management pages and select the **Object UI Access**.

    ☛ See *Accessing the Permissions management pages.*

2. in the **Access Rights** field, use the drop-down menu to select the Set of UI access rights.

    ☛ *<Hopex Default> enables to define default access permissions of each MetaClass, MetaAttribute, MetaAssociationEnd and tool.*

3. In the **MetaModel** field, select the MetaModel concerned.
   In the **MetaClass** frame, the listed MetaClasses are filtered according to the selected MetaModel.

4. In the **MetaClass** frame, select the MetaClass concerned.

5. In the toolbar of the **MetaAttributes/MetaAssociationEnds/Tools** frame, click **MetaAttribute** ▭ .
   The MetaAttributes of the MetaClass are listed.

6. Select the MetaAttribute for which you want to modify permissions.
7. In the **Permission** field, enter the new value.

> ☛ *See Permissions on a MetaAttribute.*

MetaAttributes / MetaAssociationEnds / Tools

Name ↑	Permission
IRM - Residual Risk	*RU
IRM - Risk Control Level	R

8. Press "Enter".
The value of the MetaAttribute permission is modified.

> ☛ *To return to the default value, enter the character *.*

> ☺ *To obtain information on origin of an inherited value, enter the character ?.*

Modifying access permissions on tools of a MetaClass

A tool can be available or not.

To modify access permissions on tools of a MetaClass:

1. Access the UI access management pages and select the **Object UI Access**.

> ☛ *See Accessing the Permissions management pages.*

2. in the **Access Rights** field, use the drop-down menu to select the Set of UI access rights.

> ☛ *<Hopex Default> enables to define default access permissions of each MetaClass, MetaAttribute, MetaAssociationEnd and tool.*

3. In the **MetaModel** field, select the MetaModel concerned.
In the **MetaClass** frame, the listed MetaClasses are filtered according to the selected MetaModel.
4. In the **MetaClass** frame, select the MetaClass concerned.
5. In the toolbar of the **MetaAttributes/MetaAssociationEnds/Tools** frame, click **Tools** 🔧 .
6. Select the tool for which you want to modify access permissions.

7. In the **Permission** field, enter the new value.

> ☛ *See Permissions on a tool.*

MetaAttributes / MetaAssociationEnds / Tools

Name ↑	ToolMetaclassIdentifier	Availability
IRM - Risk Audit	MetaPropertyPage	
IRM - Risk Characteristics	MetaPropertyPage	*A
IRM - Risk Incidents	MetaPropertyPage	*A

8. Press "Enter".
   The value of the tool access permission is modified.

> ☛ *To return to the default value, enter the character *.*
>
> ☺ *To obtain information on inheritance of the value, enter the character ?.*

Modifying access permissions of a link around a MetaClass

To modify access permissions of a link around a MetaClass:

1. Access the UI access management pages and select **Access Object UIs**.

   > ☛ *See Accessing the Permissions management pages.*

2. in the **Access Rights** field, use the drop-down menu to select the Set of UI access rights.

   > ☛ *<Hopex Default> enables to define default access permissions of each MetaClass, MetaAttribute, MetaAssociationEnd and tool.*

3. In the **MetaModel** field, select the MetaModel concerned.
   In the **MetaClass** frame, the listed MetaClasses are filtered according to the selected MetaModel.

4. In the **MetaClass** frame, select the MetaClass concerned.

5. In the toolbar of the **MetaAttributes/MetaAssociationEnds/Tools**
   frame, click **MetaAssociationEnd** 🗃 .

6. Select the MetaAssociationEnd for which you want to modify link access permissions.

7. In the **Permission** field, enter the new value.

☛ *See Permissions on a MetaAssociationEnd.*

MetaAttributes / MetaAssociationEnds / Tools

Name	SlaveMetaClass ↑	Link Permission
🔲 Property contained	🔲 Abstract Property	-
🔋 Account	🔲 Account	*CRUD
⚙️ Action	🔲 Action (Action Plan)	RUD
✖️ Action Plan	🔲 Action Plan	*CRUD

8. Press "Enter".
    The value of the link access permission is modified.

☛ *To return to the default value, enter the character *.*

☛ *To obtain information on inheritance of the value, enter the character ?.*

See also Modifying access permissions on links around a MetaClass.

Modifying access permissions on links around a MetaClass

You can modify access permissions on:
- the link according to the MetaClass accessed via the link
- one of the MetaAttributes of the link
- one of the MetaClasses accessed via the link

```
Example: You can grant rights to connect (but not to create)
an IT Service to an Application via this same link.
```

To modify access permissions on links around a MetaClass:

1. Select the MetaAssociationEnd.

☛ *See Modifying access permissions of a link around a MetaClass, steps 1 to 6.*

2. In the menu bar of the **MetaAttributes of MetaAssociationEnds/ Slave MetaClasses/MetaAssociations**, click **MetaAttribute** 🔲 , **MetaClass** 🔲 , or **MetaAssociation** 🔍 .

3. In the list, select the MetaAttribute, MetaClass or MetaAssociation concerned.

4. In the **Permission** field, modify the permission value.

☛ *See Permissions on a MetaAttribute.*

☛ *See Permissions on MetaClass occurrences.*

5. Press "Enter".
The value of the access permission is modified.

☞ *To return to the default value, enter the character *.*

☞ *To obtain information on origin of an inherited value, enter the character ?.*

Rules on permissions while aggregating Sets of UI access rights

When a **Set of UI access rights** uses one or several Sets of UI access rights, its permissions are defined by addition of permissions defined on the Sets of UI access rights it uses.

```
Example:

The Sets of UI access rights S1 and S2 are connected to the
Set of UI access rights S3 of the profile P3.

If the permission value on an object A of the Set of UI
access rights S1 is CR and the one of the Set of UI access
rights S2 is RUD, then this permission value on object A for
the Set of UI access rights S3 is CRUD.
```

Attention to default values

A permission value with * means that this value is the default permission value and that it has not been specifically defined. Only those values specifically defined are taken into account in aggregation.

```
Example:

The Sets of UI access rights S1 and S2 are connected to the
Set of UI access rights S3 of the profile P3.

If the permission value on an object A of the Set of UI
access rights S1 is *CRUD and the one of the Set of UI
access rights S2 is R, then this permission value on object
A for the Set of UI access rights S3 is R.
```

Generating Reports on Permissions

The following Report Templates enable to generate permissions related reports:

- **Profile Permissions comparison Report** enables to compare permissions of several profiles.
- **Profile Permission report** enables to generate the detail of permissions for a given profile.
- **Workflow Permissions** enables to generate the detail of permissions for a given workflow.

Generating a report comparing profile permissions

Report content

All MetaClasses of the selected metamodel appear in the report.

For each MetaClass, the report displays:
- (in rows) all MetaAttributes, Tools, MetaAssociations (and MetaAttributes of MetaAssociations) of the MetaClass.
- (in columns) permissions for all selected profiles.

To generate a report comparing permissions of profiles:

1. Access the **Profiles** management page.

   ☛ See *Accessing the Profile Management Page.*

2. In the **Profiles** list select the profiles you want to compare.

   ☺ *Use the list filtering tool to find the profiles.*

   ☛ *Select at least two profiles. If needed you can add more profiles step 5.*

3. In the list menu bar, click **Instant Report** 📰 .

   ☛ *To generate the instant report in a new tab click ↗ .*

4. Select **Profile Permission comparison Report** and click **OK**.

5. Configure the **Parameters**:

   - in the **MetaModel** list, click **Connect** 🔗 and select the metamodel concerned

   - (if needed) in the **Profile** list, click **Connect** 🔗 to add profiles

     ☺ *For a faster result, do not select a large number of profiles.*

     ☛ *If you have already generated the report with other profiles, these profiles might still be connected, click **Remove** ⛔ to remove them if needed.*

6. Click **Apply Parameters**.
The report is generated as a table.

☛ *Generation may take some time depending on the parameters selected.*

☺ *Display in full page for more readability.*

E.g. the permission comparison report of **Application Viewer** and **EA Functional Administrator**.

Report Parameters Table

MetaModel	Profile
HOPEX IT Portfolio Management	• Application Viewer • EA Functional Administrator

Concrete MetaClass CRUD

CRUD	⌄

	Profile	
Metaclass	Application Viewer	EA Functional Administrator
Action (Action Plan)	-R	*CRUD
Action Plan	R	CRUD
Advice	*	*CRUD
Aggregated Result	*	*CRUD
Application	RS	CRUDS
Application Advice	*	*CRUD
Application Decision	-R	*CRUD
Application Environment	R	CRUD

7. (If needed) In **Concrete MetaClass CRUD** or **MetaAttributes CRUD**, filter the report according to permission values.

   `E.g.: filter on "R" permissions.`

8. To save the report, in the report tool bar, click **More** ⋮ **> Save as Report** 🖻 .

   ☛ See *Saving an Instant Report.*

Generating a report on a profile permissions

Report content

All MetaClasses of the selected metamodel appear in the report.

For each MetaClass, the report displays:
- (in rows) all MetaAttributes, Tools, MetaAssociations (and MetaAttributes of MetaAssociations) of the MetaClass.
- (in columns) permissions for the selected profile

To generate a report on profile permissions:

1. Access the reports.

    ☛ *See Creating a Report*

2. Click `+ Create a report` .

3. In the **Search by name filter**, enter "permission"

4. Select the report template concerned.

    E.g.: `Profile Permissions Report.`

5. Click **Next**.

6. Select the report parameters:

    *   in the **MetaModel** list, click **Connect** 🔗 and select the metamodel concerned.

        ☛ *For the **Workflow Permissions** report template, in the **Workflow** list, click **Connect** 🔗 and connect the Worflow Definition.*

    *   in the **Profile** list, click **Connect** 🔗 and select the profile concerned.

7. Click **Preview**.
The report is generated as a table.

E.g. the permission report of **Control and Risk Architect.**

Profile Permission Report-1

Report Parameters Table

MetaModel	Profile
HOPEX Enterprise Risk Management	• Control and Risk Architect

Concrete MetaClass CRUD

CRUD ⌄

MetaClass	CRUD
Account	*
Action (Action Plan)	CRUDS
Action Plan	CRUDS
Application	CRUDS
Assessment Aggregation	*CRUD
Assessment Campaign	CRUDS
Assessment Session	CRUDS
Audit Item	*
Business Line	CRUDS
Business Policy	CRUDS

8. (If needed) In **Concrete MetaClass CRUD** or **MetaAttributes CRUD**, filter the report according to permission values.

    E.g.: filter on "RU" permissions on MetaAttributes CRUD.

MetaAttributes CRUD

MetaClass	MetaAttribute	CRUD
	Comment	*RU
	Current Workflow Status	*RU
	Machine translation update date	*RU
	Name	*RU
	Planned Begin Date	*RU
Action (Action Plan)	Planned End Date	*RU
	Action Progress	*RU
	Reading access area	*RU
	Real Begin Date	*RU
	Real End Date	*RU
	Version of name server	*RU

9. Click **Continue** to configure and save the report.

    ☛ *See Creating a Report.*

Managing Permissions on General UI

You can manage general UI access for a profile. General UIs are classified by category, like:

- desktop
- command category
- command group
- general command
- property page
- tree
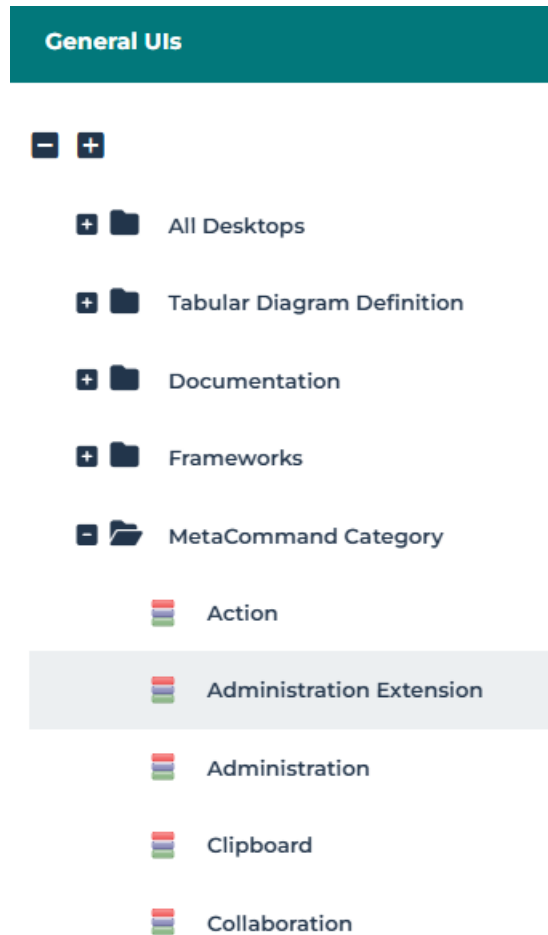- Working Environment Template (WET)

To manage general UI access:

1. Access the UI access management pages and select **General UI Access**.

☛ *See Accessing the Permissions management pages.*
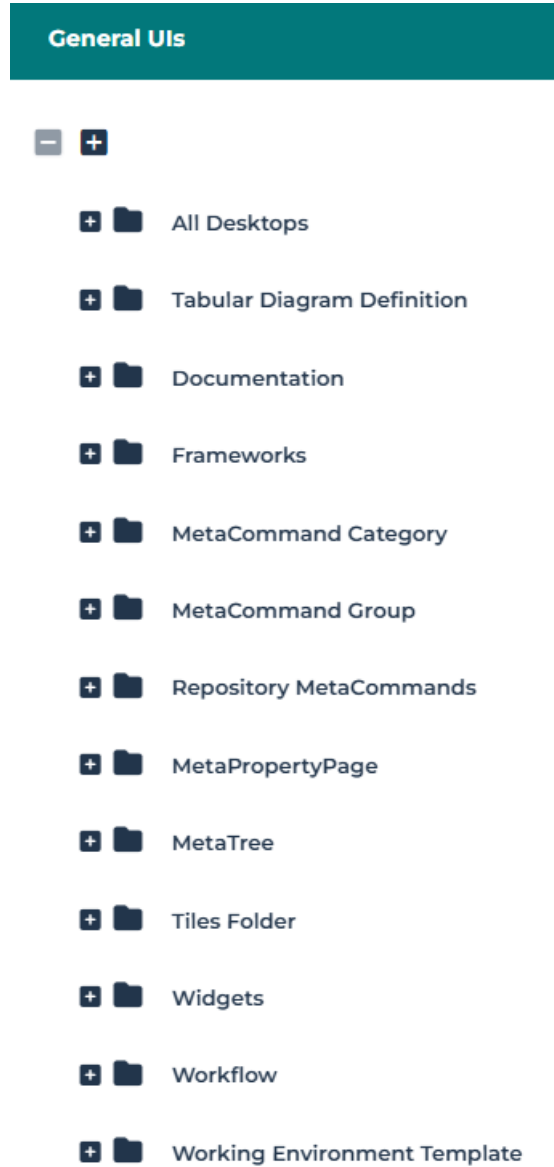
2. Expand the folder of the category concerned.

3. In the list, select the tool concerned.

General UIs

- ➖ ➕

  - ➕ 📁 All Desktops

  - ➕ 📁 Tabular Diagram Definition

  - ➕ 📁 Documentation

  - ➕ 📁 Frameworks

  - ➖ 📂 MetaCommand Category

    - ▤ Action

    - ▤ Administration Extension

    - ▤ Administration

    - ▤ Clipboard

    - ▤ Collaboration

4. In the **Access rights and Availability** pane, select the Set of UI access rights for which you want to modify access on the tool.

☺ *You can use the list filtering tool to help you find the Set of UI access rigth concerned.*

5. In the **Tool Availability** field, modify the availability value.

Access rights and Availability

Workflows ⌄

Name ↑	Perspective	Tool Availability	
🔍 viewer	🔍	🔍	
Application Viewer Lite	📜 <Default>	*A	
Data Viewer	📜 <Default>	*A	
DoDAF Viewer	📜 <Default>	*A	

6. Press "Enter".
The value of tool availability is modified.

☛ *To return to the tool availability default value, enter the character *.*

☛ *To obtain information on origin of an inherited value, enter the character ?.*