

HOPEX Explorer

User Guide



HOPEX V2

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INTRODUCTION TO HOPEX EXPLORER



Companies need to derive benefits from their investments in business process analysis and enterprise architecture projects. To achieve this, they communicate information on these initiatives to all their collaborators. These projects constitute a source of valuable information for the organization in terms of decision-making, alignment on objectives and impact analyses. Visibility plays a decisive role in assessing return on investment of these projects.

Using **HOPEX Explorer**, organization and IT managers are able to provide key information derived from enterprise business process and architecture analyses.

HOPEX Explorer is a Web application providing reports easily accessible via a Web portal to a large number of users, beyond just those with real modeling expertise. All enterprise stakeholders needing to access information relating to business process analysis and enterprise architecture can consult this Web portal.

HOPEX Explorer offers direct, dynamic access to **HOPEX** repositories. The Web portal delivers complete and up-to-date information. The user can query the **HOPEX** repository and dynamically generate reports according to his or her context and preferences.

CONVENTIONS USED IN THE GUIDE

 *Remark on the preceding points.*

 *Definition of terms used.*

 *A tip that may simplify things.*

 *Compatibility with previous versions.*

 **Things you must not do.**



Very important remark to avoid errors during an operation.

Commands are presented as seen here: **File > Open.**

Names of products and technical modules are presented in bold as seen here:
HOPEX.

CONNECTION TO HOPEX EXPLORER



With **HOPEX Explorer**, enterprise architecture and business process analysis project managers have a central location for grouping and delivering dynamic information adapted to user views. IT managers, operations directors, department heads and other decision-makers can consult the Web portal in their own context, and easily access global or specific views of the organization.

The following points are covered here:

- ✓ ["Connecting to HOPEX Explorer", page 4](#)
- ✓ ["Reinitializing Your Password", page 8](#)

CONNECTING TO HOPEX EXPLORER

See:

- ["Connection Profiles to HOPEX Explorer", page 4](#)
- ["Accessing HOPEX Explorer", page 4](#)

Connection Profiles to HOPEX Explorer

The following two profiles give access to the **HOPEX Explorer** Web application:

- **Explorer Reader**
The Explorer Reader profile gives read-only access to **HOPEX Explorer** application (**Explorer** desktop).
- **Explorer Writer**
The Explorer Reader profile gives writing access to **HOPEX Explorer** application (**Explorer (RW)** desktop).

For an overview of the functionalities available for Explorer Reader and/or Explorer Writer see ["Differences Between Explorer Reader and Explorer Writer", page 53](#).

Accessing HOPEX Explorer

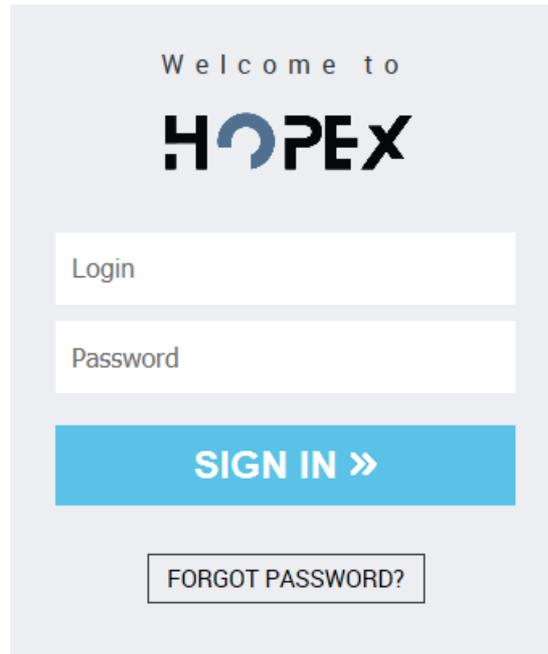
Connection to **HOPEX Explorer** is via the Web.

To connect to the **HOPEX Explorer** application:

1. Start the **HOPEX** application using its HTTP address.

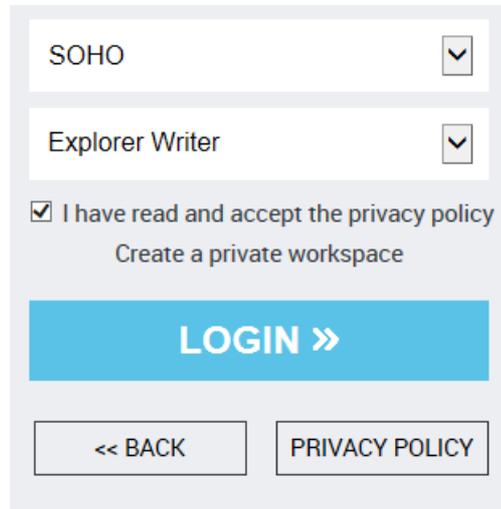
☛ *If you do not know this address, contact your administrator.*

The connection page appears.



2. In the **Login** field, enter your identifier.
3. (If you have a password) In the **Password** field, enter your password.
☛ *If you have lost your password, click **FORGOT PASSWORD**, see "Reinitializing Your Password", page 8.*
4. In the drop-down menu for environments, select your work environment.
☛ *If you can access one environment only, this is automatically taken into account and the environment selection field does not appear.*
5. Click **SIGN IN**.
When you have been authenticated, a new dialog box appears.
6. (If you belong to a person group) In the group drop-down menu, select the group with which you want to connect or "My assignments" to connect with one of your own assignments..
7. In the repository drop-down menu, select your work repository.
☛ *If you can access only one repository, this is automatically taken into account.*
8. In the profile drop-down menu, select the **Explorer Writer / Explorer Reader** profile with which you want to work.
☛ *If you have only one profile assigned, this is automatically taken into account.*
☛ *The profile you select defines the applications you can access.*

9. In the application drop-down menu, select the application to which you want to connect.
 - ☛ If you can access only one application with the selected profile, this is automatically taken into account and the application selection field does not appear.
10. Click **Privacy Policy**, read the confidentiality policy, then select **I have read and accept the privacy policy**. The **LOGIN** button is active.
 - ☛ When you have read and accepted the confidentiality policy, a certificate is automatically linked to your person and this step is not required again.



The screenshot shows a login interface with the following elements:

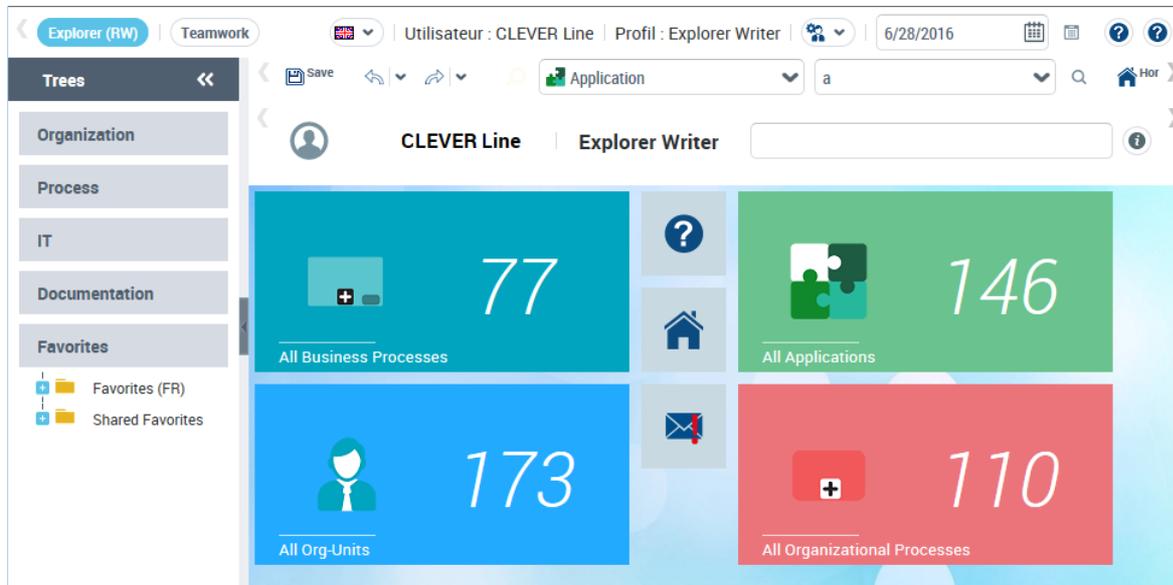
- A dropdown menu with "SOHO" selected and a downward arrow icon.
- A second dropdown menu with "Explorer Writer" selected and a downward arrow icon.
- A checked checkbox with the text "I have read and accept the privacy policy".
- The text "Create a private workspace" below the checkbox.
- A large blue button with the text "LOGIN »".
- Two buttons at the bottom: "<< BACK" and "PRIVACY POLICY".

11. Click **LOGIN**.

Click **BACK** if you want to return to the authentication dialog box.

The **HOPEX Explorer** home page appears and a session is opened.

After a certain period of inactivity, you are disconnected from **HOPEX Explorer**. To reconnect, repeat the steps of the procedure above. This inactivity period is configured by the portal administrator.



REINITIALIZING YOUR PASSWORD

If you have lost your password, you can reinitialize it (MEGA authentication case).

To reinitialize your password:

1. Open the connection page.
 - ☛ See "[Connecting to HOPEX Explorer](#)", page 4.
2. Under the connection dialog box, click **Lost password**.
The **Lost password** page appears.
3. In the **Environment** field, select your work environment.
 - ☛ *If you have access to only one environment, this is automatically selected and this field does not appear.*
4. In the **Login** field, enter your login.

Lost password

Environment

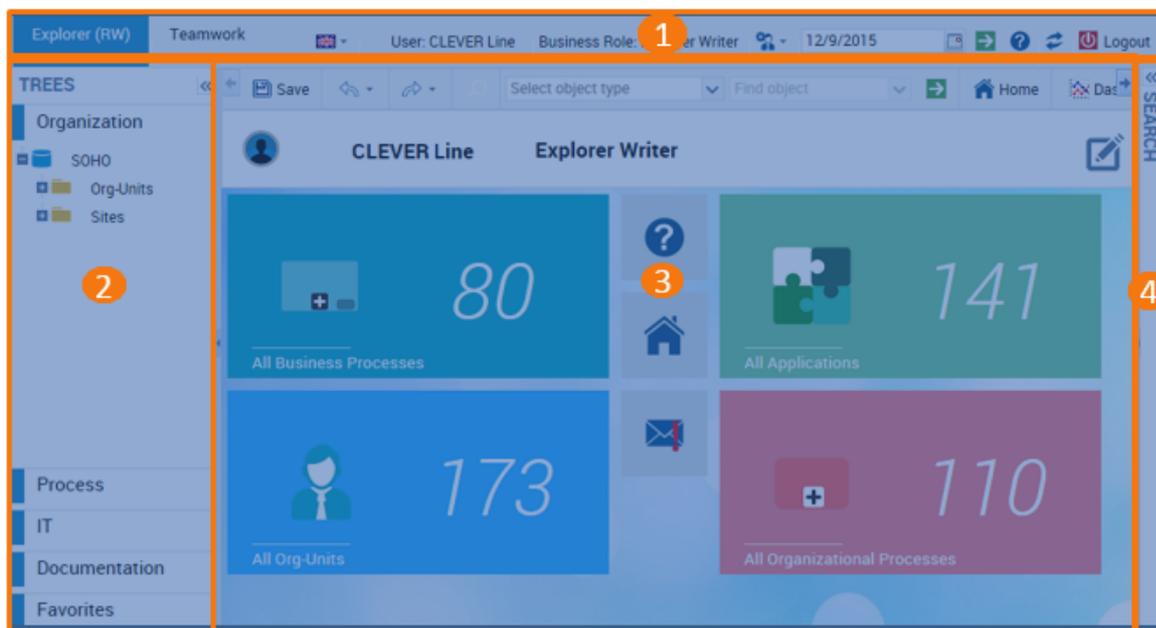
Login

5. Click **Continue**.
6. Answer the security question.
7. Click **Reinitialize**.
An e-mail containing a link with limited validity period is sent to you.
8. Click this link.
The **Change password** page appears.
9. Enter your password and answer the security question.
10. Click **Apply**.

HOPEX EXPLORER DESKTOP DESCRIPTION



Each page of **HOPEX Explorer** is presented as here:



1: toolbar, 2: navigation panes, 3: reading or writing area, 4: advanced search tool

The **HOPEX Explorer** desktop includes:

- at the top (1): a toolbar
 - ☛ See *"Toolbar"*, page 11.
- on the left (2): navigation panes displaying trees and objects to be consulted (**Explorer** desktop) or managed (**Explorer (RW)** desktop).
 - ☛ See *"Navigation Panes"*, page 13.
- in the middle (3), either:
 - a read area to consult objects (**Explorer** desktop) with **Explorer Reader** profile.
 - ☛ See *"Read and Edit Areas"*, page 14.
 - an edit area to manage objects (**Explorer (RW)** desktop) with **Explorer Writer** profile.
 - ☛ See *"Managing objects"*, page 22.
- on the right (4): an advanced search tool.
 - ☛ See *"Advanced Search Tool"*, page 16.

TOOLBAR



The toolbar is available in all pages of the **HOPEX Explorer** desktop:

- **Explorer (RW)** and **Teamwork** enable navigation between **Explorer** and **Teamwork** desktops.
 - ☛ The **Teamwork** desktop enables management of notifications, requests for change, tasks, workflows and validations via the Web; see **HOPEX Collaboration Manager**.
-  enables modification of data display language.
 - ☛ See *"Changing Data Display Language", page 28*.
- **User: CLEVER Line | Profile: Explorer Writer** indicates the name of the **HOPEX** user used for mapping and his/her profile.
-  **My account** gives access to your account to:
 - modify your password
 - ☛ *Your password must contain between 8 and 16 characters, with at least one letter, at least one figure and at least one special character.*
 - modify your options
 - ☛ *For information on options available at user level, see **HOPEX Administration - Supervisor Web** guide - chapter *Managing options*.*
 - modify the theme of your desktop
 - manage your alerts
 - ☛ See ***HOPEX Common Features** guide- chapter *Communicating in HOPEX*.*
 - obtain information on your licenses
 - diagnose the installation
 - ☛ *This information simplifies error diagnostics. It can help explain application slow response time.*
 - reinitialize your personal parameters
-   enables definition of a date (earlier than today's date) on which to consult repository state.
 - ☛ See *"Consulting Repository State at an Earlier Date", page 43*.
-  enables access to application online help.
-  **Logout** enables disconnection from the **HOPEX Explorer** desktop.

When the **HOPEX Explorer** page size is not sufficient to display the complete toolbar, arrows appear at the extremities of the toolbar.

To scroll the toolbar:

- to the left, click  .
- to the right, click  .

NAVIGATION PANES

Navigation panes enable access to trees containing environment objects.



Tree:

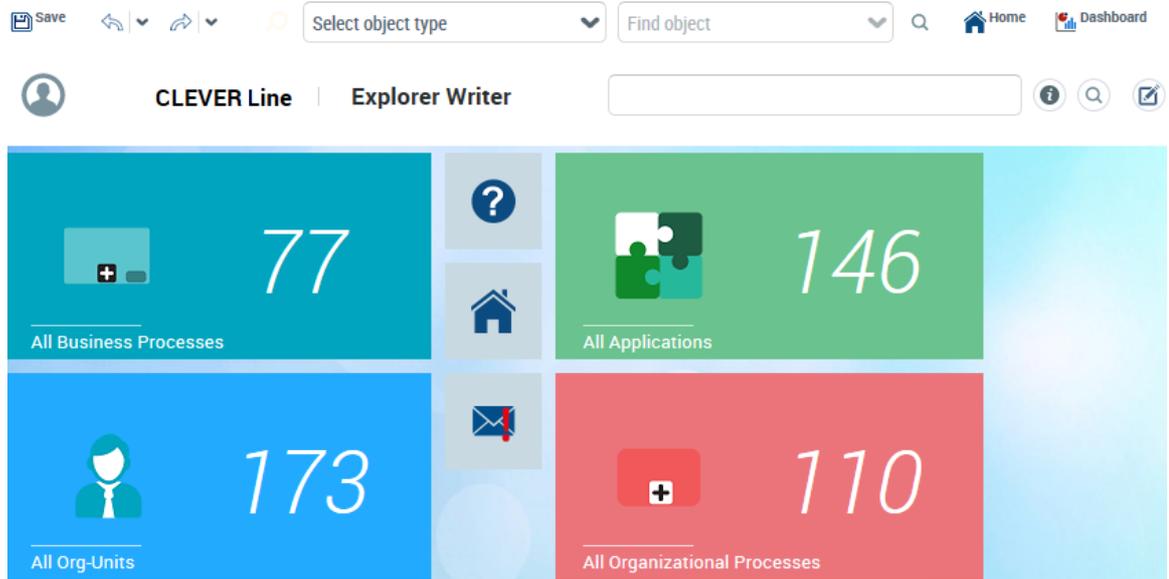
- **Organization** contains:
 - org-units
 - sites
- **Process** contains:
 - business processes
 - business functions
 - organizational processes
 - system processes
- **IT** contains:
 - applications
 - city plans
 - resource architectures
 - services
 - implementation projects
 - technical infrastructures
- **Documentation** contains:
 - books
 - dashboards
 - dictionary
 - keywords
 - reports
- **Favorites** (specific to **Explorer (RW)** desktop) contains:
 - user favorites
 - shared favorites

READ AND EDIT AREAS

With:

- **Explorer Reader** profile you access the read area
- **Explorer Writer** profile you access the edit area

At your desktop opening, the read/edit area displays the Home page.



Read/Edit Area Toolbar

When the size of the read/edit area is not sufficient to display the complete toolbar, arrows at its extremities scroll the toolbar to the left  or right .

The read/edit area toolbar contains:

-  : to access the advanced search tool
 ➤ See *"Advanced Search Tool Overview", page 16.*
-    : to perform a simple search.
 ➤ See *"Performing a Simple Search", page 36.*
-  : to return to the Home Page
-  to access your dashboard.
 ➤ See *"Customizing your Dashboard", page 46.*

The edit area toolbar also contains:

-  : to save your updates.
-  : to undo the last action executed.
-  : to redo the last action executed.

HOPEX Explorer Home Page

By default, the **HOPEX Explorer** desktop Home page includes:

- tiles, which give quick access to:
 - all the applications
 - all the processes
 - all the organizational processes
 - all the org-units
- **Help**  to access **HOPEX** online help
- **Home**  to display the Home page in full screen in the desktop
- **Alert management**  to access your alert management
 ➤ See *HOPEX Common Features* guide- chapter *Communicating in HOPEX.*

To customize your Home page, see HOPEX Common Features guide.

DESKTOP DISPLAY

You can show or hide navigation panes or search tools.

Hiding Navigation Panes

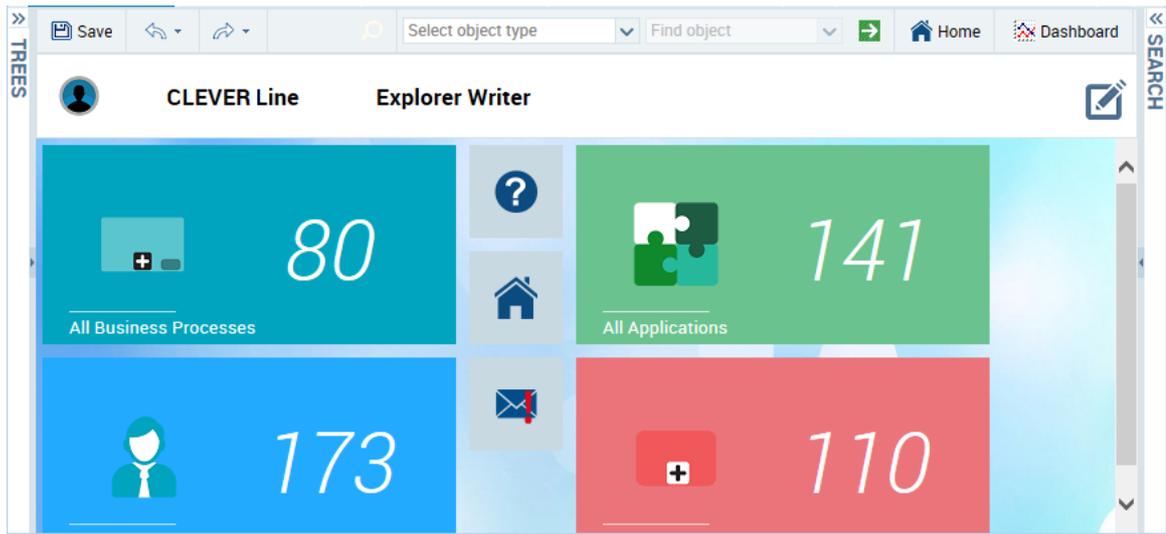
To enlarge the read/edit area, you can hide desktop navigation panes.

To hide navigation panes:

- › click the small central arrow on the right-hand edge of the navigation pane, or
- › click the double arrow in the **Trees** header.



The navigation panes are hidden.



Unfolding the Advanced Search Tool Pane

To unfold the advanced search tool pane:

- › click the small central arrow on the left-hand edge of the **Search** pane, or
- › click the double arrow at the top of the **Search** pane.



USING HOPEX EXPLORER



The following points are covered here:

- ✓ ["Managing objects", page 22](#)
- ✓ ["Changing Data Display Language", page 28](#)
- ✓ ["Consulting Books", page 29](#)
- ✓ ["Managing Diagrams", page 30](#)
- ✓ ["Searching for Objects", page 36](#)
- ✓ ["Consulting Repository State at an Earlier Date", page 44](#)
- ✓ ["Managing Favorites \(Explorer \(RW\) desktop\)", page 45](#)
- ✓ ["Customizing your Dashboard", page 47](#)
- ✓ ["Using Report in HOPEX Explorer", page 50](#)

MANAGING OBJECTS

You can execute actions from objects contained in the pages of **HOPEX Explorer**, for example from an object in a tree, a list, a diagram, a search result or a Properties page.

See:

- ["Accessing Objects", page 22](#)
- ["Accessing Object Properties pages", page 23](#)
- ["Managing Objects \(specific to Explorer \(RW\) desktop\)", page 24](#)

Accessing Objects

You can access an object in **HOPEX Explorer** from:

- trees in navigation panes
See ["Accessing Objects", page 22](#).
- a search result
See ["Searching for Objects", page 36](#).
- a diagram
See ["Managing Diagrams", page 30](#).
- a Properties page
See ["Accessing Object Properties pages", page 23](#).

To access an object from a tree:

1. Select a navigation pane.

Example: Organization

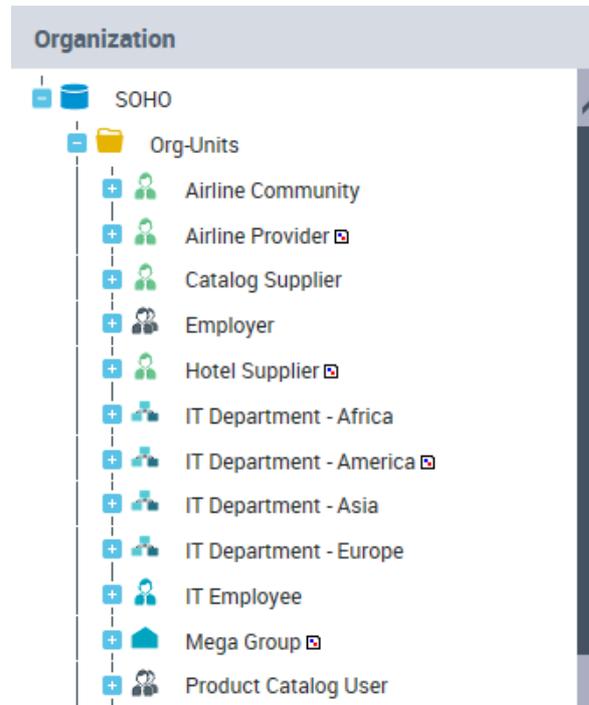
The tree of objects contained in the selected menu appears.

Example: Org-Units and Sites folders of the environment appear.

- Expand the folder corresponding to the required object type.

Example: Org-Units.

Objects contained in the selected folder appear.



- Navigate in the tree, expand folders to display the objects.
- Click the object that interests you.
The object properties appear in the read/edit area.

From the object properties page, you can execute actions on the object, see ["Managing Objects \(specific to Explorer \(RW\) desktop\)", page 24](#).

Accessing Object Properties pages

To consult or modify characteristics of an object, you must display the object properties pages.

To access Properties pages of an object:

- Access the object, see ["Accessing Objects", page 22](#).

2. Click the object.

The object properties appear in the read/edit area.

By default, the **Characteristics** page appears. It displays the local name of the object and its owner library. Properties vary according to the object.

Managing Objects (specific to Explorer (RW) desktop)

You can execute actions from objects in the different pages of the **Explorer (RW)** desktop.

Managing objects from a diagram

To manage an object from a diagram, see ["Handling a Diagram", page 32](#).

Managing an object from the menu bar of its Properties pages

You can execute different actions from the menu bar of the properties of an object. Certain actions are specific to the object, others are generic, for example:

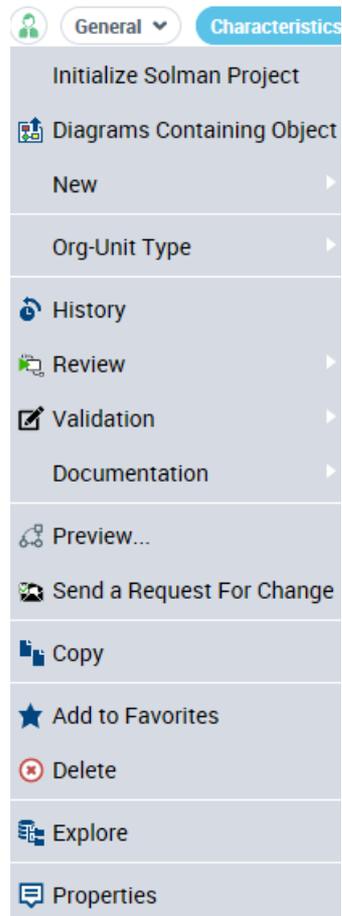
- **New** to create a new object or a report (MS Word)
- **Connect** to connect the object to another object
- **History** to consult the history of actions executed on the object
- **Report Discovery** to create a report on the object
- **Copy** to copy the object
- **Add** to Favorites to add the object to your favorites list
- **Delete** to delete the object from the repository
- **Diagrams Containing Object** to access diagrams describing the object
- **Properties** to display properties of the object in a floating window.

To manage an object from the menu bar of its Properties pages:

1. Access the properties pages of the object.
See ["Accessing Objects", page 22](#).

- From the properties of the object, click the icon of the object and select the action you want to execute.

☛ *Actions that are possible depend on the object. Actions not available on the object are grayed.*



Managing an object from a list of a table

You can manage an object from a list. For example a list is displayed in the Properties pages of the object or in a search result.

To manage an object from a list of a table:

- Display a list.

☛ *For example: access Properties pages of an object (see "[Accessing Objects](#)", page 22) or access a search result (see "[Searching for Objects](#)", page 36).*

2. In the list, select the check box alongside the object you want to manage.
 - ☛ You can select several objects.
 - ☛ Select the box in the **Local Name** header to select all objects in the list.

<input type="checkbox"/>	Name	GUI Name
<input type="checkbox"/>	Description	Description
<input checked="" type="checkbox"/>	Application	Application
<input checked="" type="checkbox"/>	Hosted Technical Infrastructure	Hosted Technical Infrastruct...
<input type="checkbox"/>	Org-Unit	Org-Unit

3. In the menu bar of the table, click the action you want to perform.
 - ☛ Click  to access hidden actions.

CHANGING DATA DISPLAY LANGUAGE

The **HOPEX Explorer** application is a multilingual Web site. The **Language** option available on the desktop allows you to view data in your preferred language. The available languages are defined in the **HOPEX** repository by the administrator.

The data display language is defined by the flag  in the desktop toolbar.

➤ See "[Toolbar](#)", page 11.

To change the data display language in the **HOPEX Explorer** desktop:

- 1 In the toolbar, select the language in the drop-down menu of the flag. Data is displayed in the selected language.

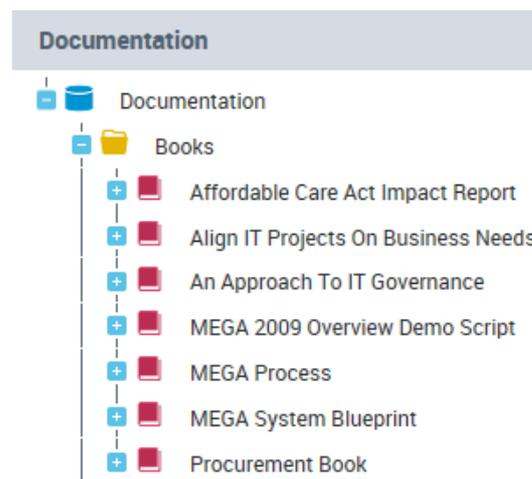
➤ Before **HOPEX** objects can appear in the required language, they must first be translated in the repository.

CONSULTING BOOKS

A book in **HOPEX** is a document comprising text, diagrams, and reports, structured in chapters and paragraphs. It can be used to generate RTF and PDF documents. You can consult books from **HOPEX Explorer**.

To access books available to you:

1. Select the **Documentation** navigation pane.
 - See "[Navigation Panes](#)", page 13.
2. In the documentation tree, expand the **Books** folder. The available books appear.



3. Click the book that interests you to consult its details.

MANAGING DIAGRAMS

In **HOPEX Explorer**, you can view the diagrams that contain or describe an object.

See:

- ["Opening a Diagram", page 30](#)
- ["Handling a Diagram", page 32](#)

Opening a Diagram

You can open a diagram from:

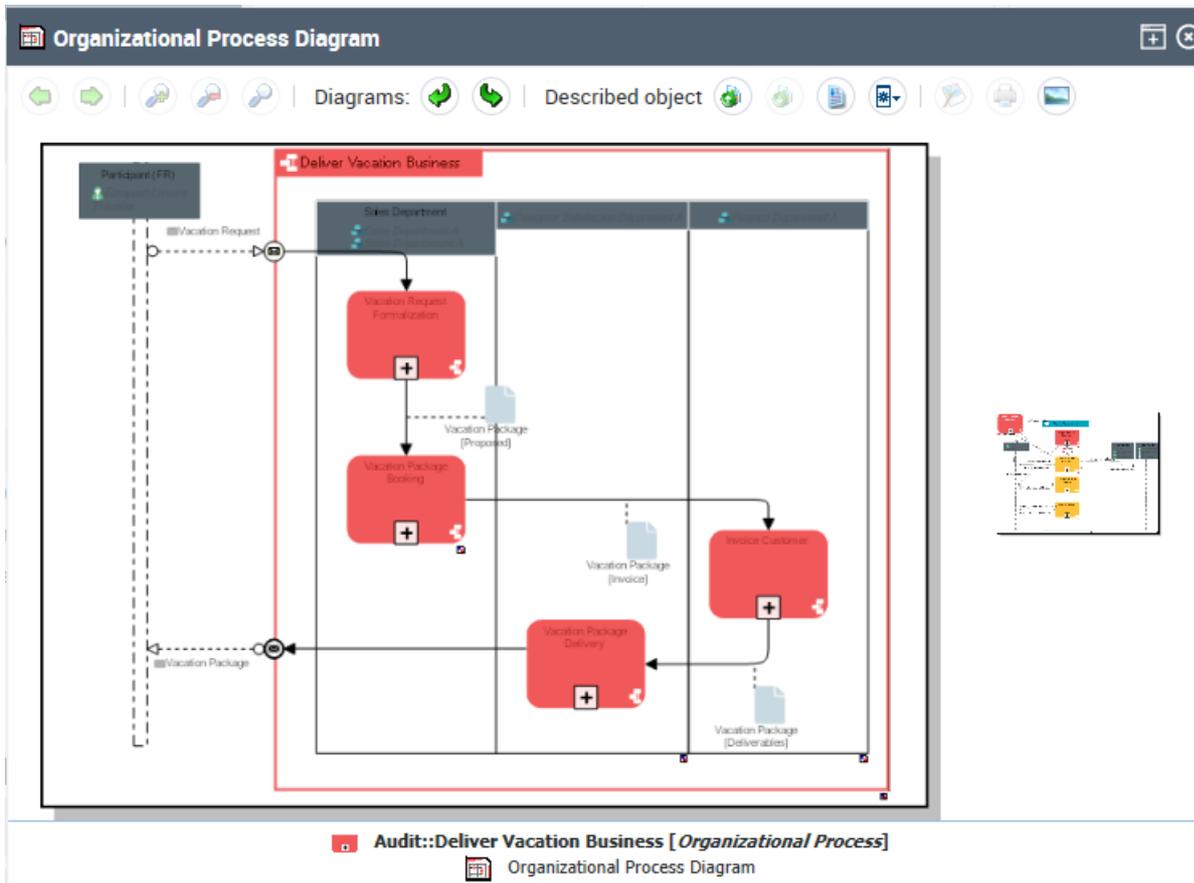
- Properties pages of an object
- results of a search on an object
- results of a search on the **Diagram** object

Opening a diagram from the Properties pages of an object

To open a diagram from object Properties pages:

1. Access the Properties pages of the object described by the diagram.
➡ See ["Accessing Object Properties pages", page 23](#).

- From the properties of the object, click the icon of the object and select **Diagrams Containing Object**. All the diagrams containing the selected object appear in a window.



- Click the desired diagram. The diagram is displayed.
 - See ["Navigating between diagrams", page 34](#).

Opening a diagram from the search results on an object

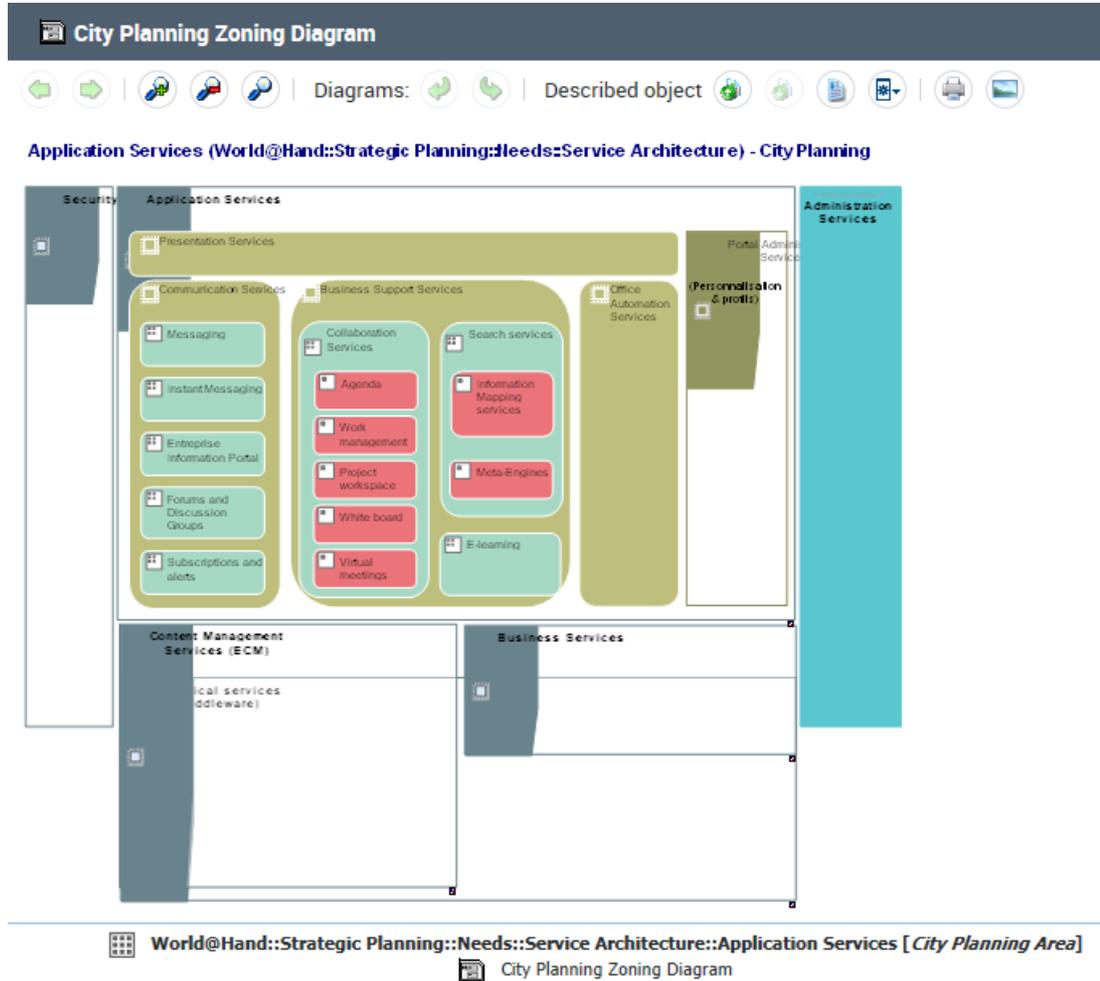
To open a diagram from search results on an object:

- Right-click the object and select **Diagrams Containing Object**. All the diagrams containing the selected object appear in a window.
 - See ["Navigating between diagrams", page 34](#).

Opening a diagram from the search results on the Diagram object

To open a diagram from search results on the **Diagram** object:

- 1 Click the diagram.
The diagram is displayed in the edit/read area.



The diagram name and type are indicated at the bottom of the page.

Handling a Diagram

You can perform actions on the diagram or on an object described in the diagram:

- from the toolbar specific to the diagram
- from the pie menu that appears when you select an object.

Handling a diagram from the diagram toolbar

To handle diagrams, in the diagram toolbar click:

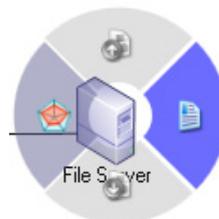
- **Back**  / **Forward**  to navigate between diagrams that are open.
- **Next**  / **Previous**  to navigate between diagrams containing or describing the object.
The mouse wheel also enables navigation between diagrams.
- **Zoom in**  to enlarge the image.
- **Zoom out**  to reduce the image.
- **Show all**  to return to the original size of the image.
You can also zoom in and out using the mouse wheel or using keyboard scroll keys (previous page and next page).
- **Diagrams containing described object**  to access diagrams containing the described object.
The object blinks when it appears in another diagram.
- **Diagrams describing described object**  to access diagrams describing the object selected in the diagram.
- **Analyze described object**  (specific to **Explorer (RW)** desktop) to generate a report on the described object.
- **Properties of described object**  to open the properties page of the object selected in the diagram.
- **Print this diagram**  to save the diagram in pdf format.
- **Save the picture as**  to save the diagram in image format (png, svg, emf, jpeg).

 *Unavailable options are grayed.*

Handling an object from its pie menu

To handle a diagram object from its pie menu:

1. Select an object in the diagram.
A pie menu appears on the object.



Available options are mauve.
The selected option is violet.
Unavailable options are grayed.

2. Click the part that represents the action you want to execute:

- access object Properties 
- create a report on the object 
- open other diagrams containing the object 
- open other diagrams describing the object .

Adjusting position of diagram in the window

You can adjust position of diagram in the window. This can be useful for instance when you zoom and want to view a particular part of the diagram.

To move the image on the page:

1. Click in an empty part of the diagram.
2. Hold the mouse button down and move the pointer.
3. Release the mouse button where you want to view the diagram.

Navigating between diagrams

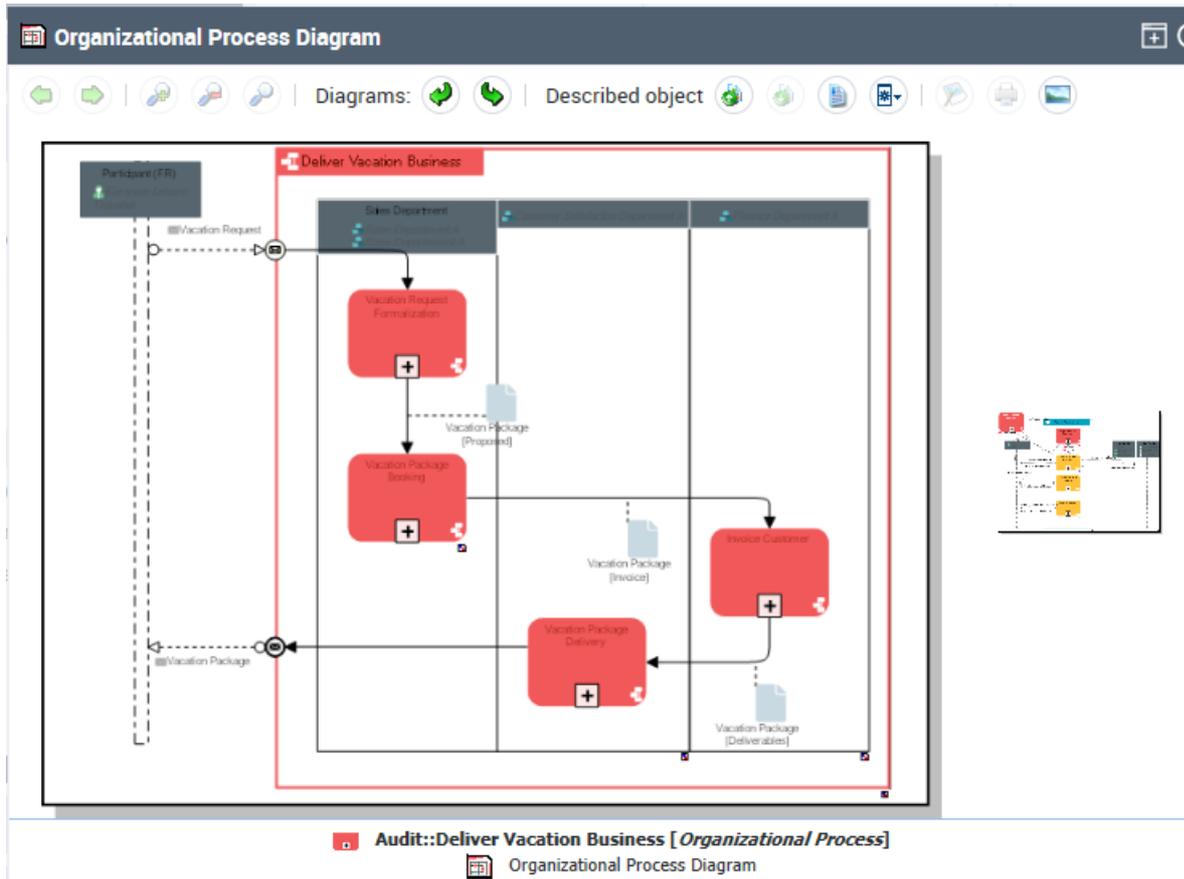
When several diagrams are available for the same object, they are all displayed in the same window.

To navigate between diagrams:

1. Open the diagram window from an object.
➡ See *"Opening a Diagram"*, page 30.

The window opens and displays all the diagrams containing the object.

2. Navigate between diagrams using the mouse wheel.



3. Click the diagram you want to display full size.

SEARCHING FOR OBJECTS

The search tool in **HOPEX Explorer** enables the execution of dynamic searches on objects in the **HOPEX** repository. Searches can be of a simple type or carried out using queries.

See:

- ["Performing a Simple Search", page 36](#)
- ["Performing an Advanced Search", page 37](#)
- ["Search and Confidentiality", page 42](#)

Performing a Simple Search

Simple searches are based on either:

- the object name
- a name in the comment of the searched object

To perform a simple search:

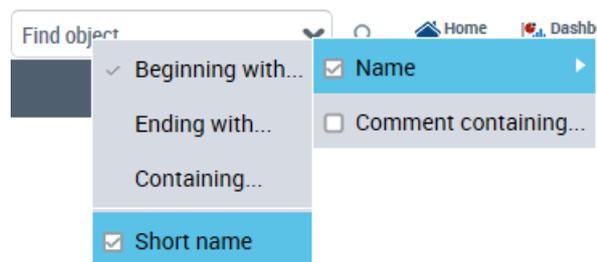
1. Access the reading area (**Explorer** desktop) or edit area (**Explorer (RW)** desktop).

☛ See ["Read and Edit Areas", page 14](#).

2. In the **Select Object Type** drop-down menu, select the object type to which your search relates.
3. By default the search relates to the **Name, Beginning with** the character chain you will enter.

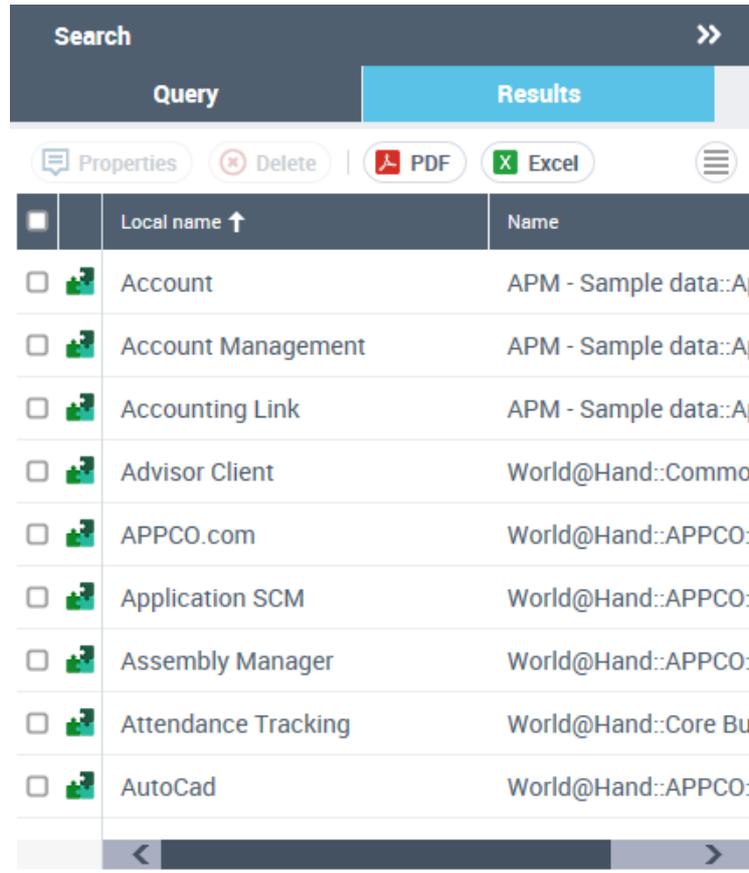
To modify these parameters, in **Find Object** field, click the arrow and select the option on which you want to base your search: **Name** and/or **Comment containing**.

☛ You can also execute a search on a **Name Ending with** or **Containing** the character chain you will enter, or on a long name.



4. In the **Find Object** field, enter the character chain on which your search is based.

- Click **Find**  to start the search.
Search results appear in the **Results** tab of the **Search** tool.



- Select the object you want to consult.
The Properties pages of the object appear in the reading/edit area.
 Click another object in search results to display its properties. The Properties of the previous object are replaced.

Performing an Advanced Search

Advanced searches are searches carried out by means of queries, either:

- with the help of a wizard
- via a registered query
- by manual entry of query parameters

 To execute searches in the form of queries, you must know the names of the object types handled, and be familiar with query syntax, see HOPEX Power Studio.

See:

- "Performing an advanced search with the wizard", page 38
- "Performing an advanced search on a registered query", page 39
- "Performing an advanced search in ERQL mode", page 40

Performing an advanced search with the wizard

With **Wizard mode**, you can execute more detailed searches. Detail can relate to:

- object attributes and/or
- Object properties

To perform an advanced search with the wizard:

1. Open the advanced search tool.

☛ See "[Starting the Advanced Search Tool](#)", page 16.

The advanced search tool appears.

2. In the **Select Object Type** drop-down menu, select the object type to which your search relates.
3. Click the **Wizard mode** pane.
4. (Optional) In the **Attributes** tab, specify the operator and value defining the attribute to which the search relates:
 - Click in the **Operator** field of the attribute to which the search relates and select the required operator.

☛ *Attributes in the drop-down list come directly from **HOPEX** and exist in English only.*

☛ *With the "Like" operator, the result contains the specified value, while with the "=" operator, the result is exactly the specified value.*

- Click in the **Value** field of the attribute and enter the character chain to search for.

☛ *Each specified **Operator** or **Value** is highlighted by a small red triangle at top left of its cell.*

5. (Optional) Configure another attribute, repeat step 4.

6. To include link conditions in your search, select the **Links** tab and specify the link characteristics to which the search relates.
 - In the **Links** tab, specify as in step 4 the **Operator** and **Value** fields of the link to which the search relates.
 - (Optional) Configure another link, repeat step 6.

Name	Operator	Value
End life date		
Freeze past Time Period		
Headcount		
Hourly Rate		
Internal/External	=	Internal Org-Unit
Life Cycle Definition		
Local name		

7. Click **Find** to start the search. The list of results appears in the **Results** tab.
8. Select the object you want to consult. Properties of the object appear in the read/edit area.

Performing an advanced search on a registered query

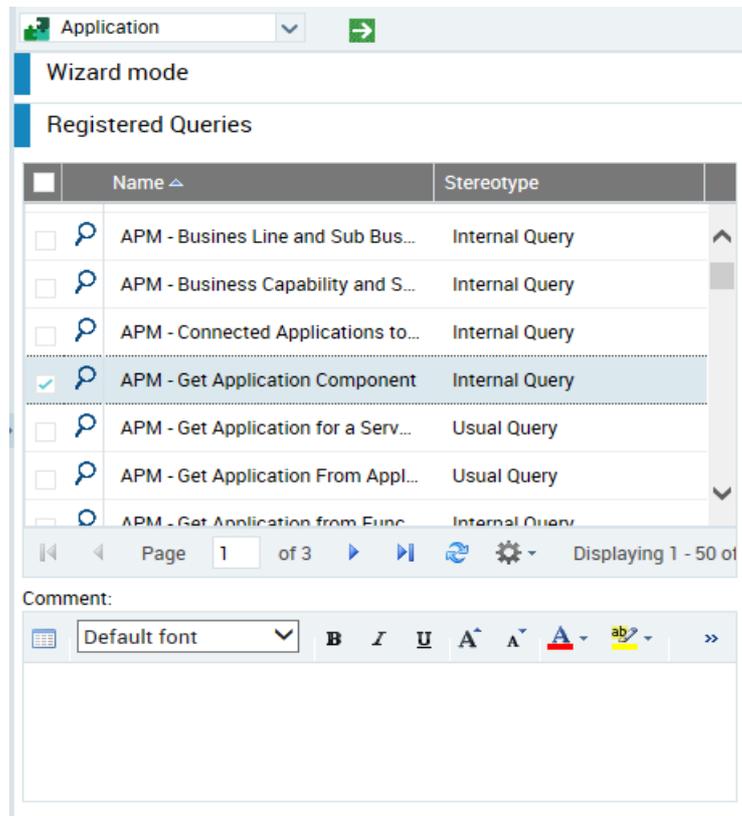
You can perform a search on registered queries linked to an object, and run the query.

To perform an advanced search from a registered query:

1. Open the advanced search tool.
 - See ["Starting the Advanced Search Tool", page 16](#).

The advanced search tool appears.
2. In the **Select Object Type** drop-down menu, select the object type to which your search relates.
3. Click the **Registered Queries** pane. The list of registered queries relating to the selected object appears.

4. Select the query that interests you.
In the **Comment** tab, the comment associated with the query is displayed (if a comment exists).



5. Click **Find**  to run the query.

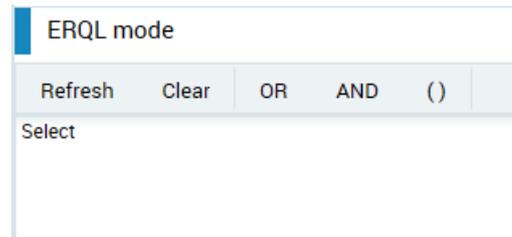
Performing an advanced search in ERQL mode

To perform an advanced search in ERQL mode:

1. Open the advanced search tool.
 - ➔ See ["Starting the Advanced Search Tool"](#), page 16.

The advanced search tool appears.
2. In the search tool, click the **Query** tab.

- Click the **ERQL mode** pane.



- Enter a query.

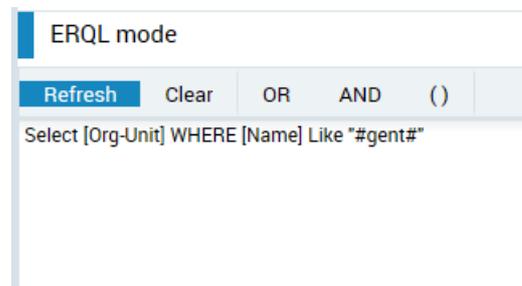
☛ See HOPEX Power Studio - Query Syntax.

Example: "Select Org-Unit Where Name like "#agent#" finds org-units whose name contains agent.

- Click **Find**  to start the search.
The list of results appears in the **Results** tab.
- Select the object you want to consult.
Properties of the object appear in the read/edit area.

To simplify data entry, you can build a query from properties selected in the wizard:

- In the **Select Object Type** drop-down menu, select the object type to which your search relates.
- Select the query parameters in the **Wizard mode**.
- When you have selected your parameters, select the **ERQL mode** pane.
- In the command bar of the **ERQL mode** pane, click .
The syntax of the search query appears.



- Complete the syntax.
- Click **Find**  to run the query.
The list of results appears in the **Results** tab.
- Select the object you want to consult.
Properties of the object appear in the read/edit area.

Search and Confidentiality

Certain modeling projects may be confidential or contain confidential or sensitive data (Example: costs, risks, controls). The administrator may therefore decide to hide certain objects so that they are only visible to authorized users.

Visibility of objects by a user is managed in **HOPEX** by reading accesses. A reading access level is associated with each user, which enables restriction of his/her visibility of data.

➤ For more details on data reading access, see the **HOPEX Administration - Supervisor** guide.

The **HOPEX Explorer** search tool operates in dynamic mode. Searches take into account the reading access area of the user. Depending on the reading access area, the search results can therefore vary and display different numbers of objects.

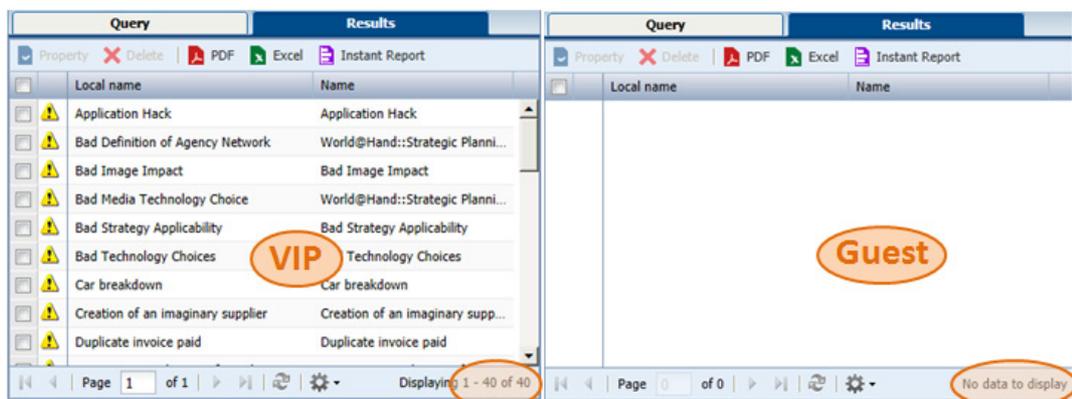
Objects not available in diagrams due to their reading access level appear in search results, but cannot be accessed by the user.

Search example

Take the example of a search for risks with two distinct users and their associated reading access level:

- "Guest" (standard level)
- "VIP" (maximum level)

Search on the **Risk** object returns 0 objects for the "Guest" user and 40 objects for the "VIP" user.



On the following "Geographical Risk Map":

- for the "Guest" user, risks are grayed and their details are not accessible.
- having the maximum reading access level, the "VIP" user can access all risks in the diagram.



CONSULTING REPOSITORY STATE AT AN EARLIER DATE

The **HOPEX Time Machine** function allows you to consult repository state at an earlier date.

To consult repository state at an earlier date, a repository snapshot must have been previously created on this date.

☛ *The repository snapshot creation function is available with **HOPEX Collaboration Manager**.*

☛ *To create a repository snapshot, see **HOPEX Collaboration Manager**.*

Consulting Repository View at an Earlier Date

To consult the view of the repository at an earlier date:

1. In the menu bar, click the calendar and select a date.

☛ *The date must be earlier than today's date.*

2. Click **Time Machine** .

You have a read-only view of the repository on the selected date.

☛ *To return to the current view, see ["Returning to the Current View of the Repository"](#), page 44.*

Returning to the Current View of the Repository

To return to the current view of the repository:

1. In the menu bar, click the calendar .

2. Under the calendar, click **Today**.

The current view of the repository is displayed in writing mode (**Explorer (RW)** desktop) or in reading mode (**Explorer** desktop).

MANAGING FAVORITES (EXPLORER (RW) DESKTOP)

The favorite management function is specific to the **Explorer Writer** profile.

See:

- ["Adding Favorites", page 45](#)
- ["Accessing Favorites", page 45](#)
- ["Removing an object from favorites", page 45](#)

Adding Favorites

To add an object to your favorites:

1. Access the Properties pages of the object.
See ["Accessing Objects", page 22](#).
2. From the Properties of the object, click the icon of the object and select **Add to Favorites**.

The selected object is added to your list of favorites.

☛ To consult your favorites, see ["Accessing Favorites", page 45](#).

Accessing Favorites

From the **Favorites** navigation pane, you can access your own favorites and shared favorites.

To access a favorite:

1. Select the **Favorites** navigation pane.
2. Expand the **My Favorites** or **Shared Favorites** folder.
3. Click the favorite you want to consult.



The Properties page of the favorite appear in the edit area.

Removing an object from favorites

You can remove an object from favorites.

To remove an object from favorites:

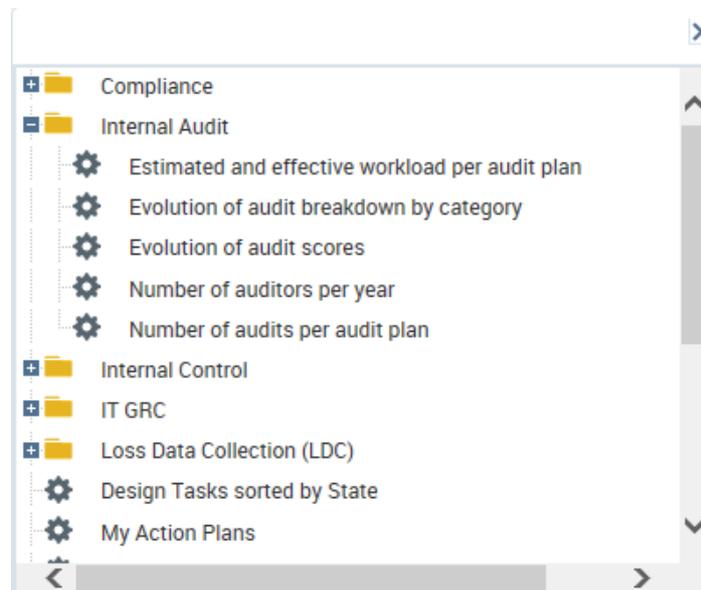
1. Access the favorite.
See "[Accessing Favorites](#)", page 45.
2. Right-click the favorite you want to remove from the list and select **Disconnect**.
The object is removed from the list of favorites.

CUSTOMIZING YOUR DASHBOARD

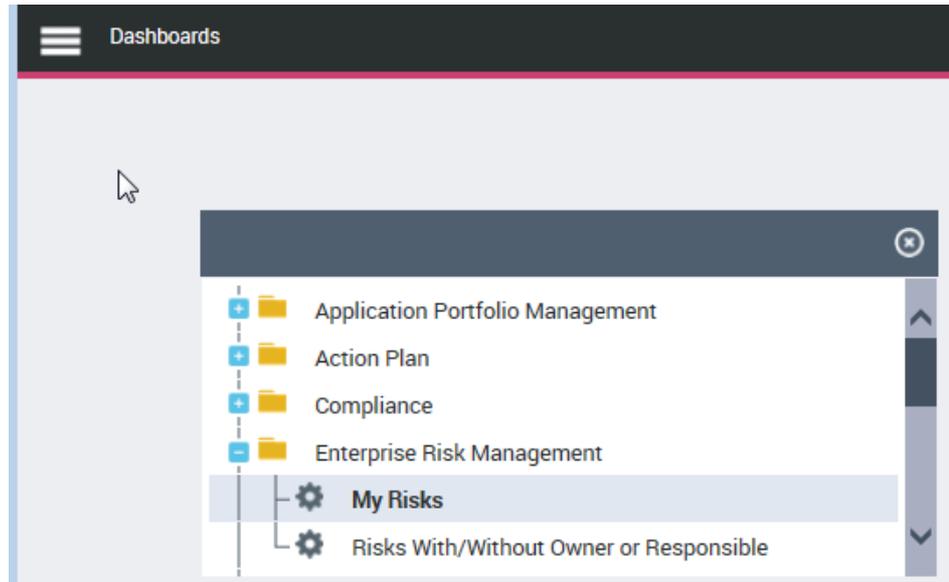
You can customize your dashboard to quickly access your frequently used elements.

To customize your dashboard:

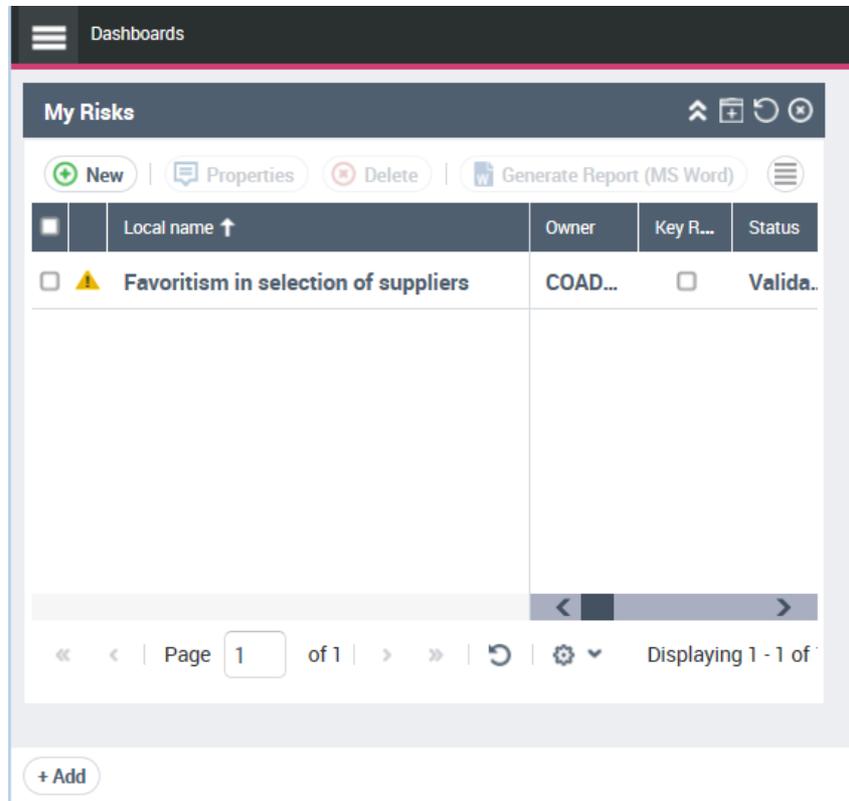
1. In the read/edit area, click **Dashboard** .
2. In the read/edit area, click **Add**.
The list of elements you can display in your dashboard appears.



3. Select an element and drag-and-drop it to the dashboard.
 - ➡ *Expand folders if necessary.*

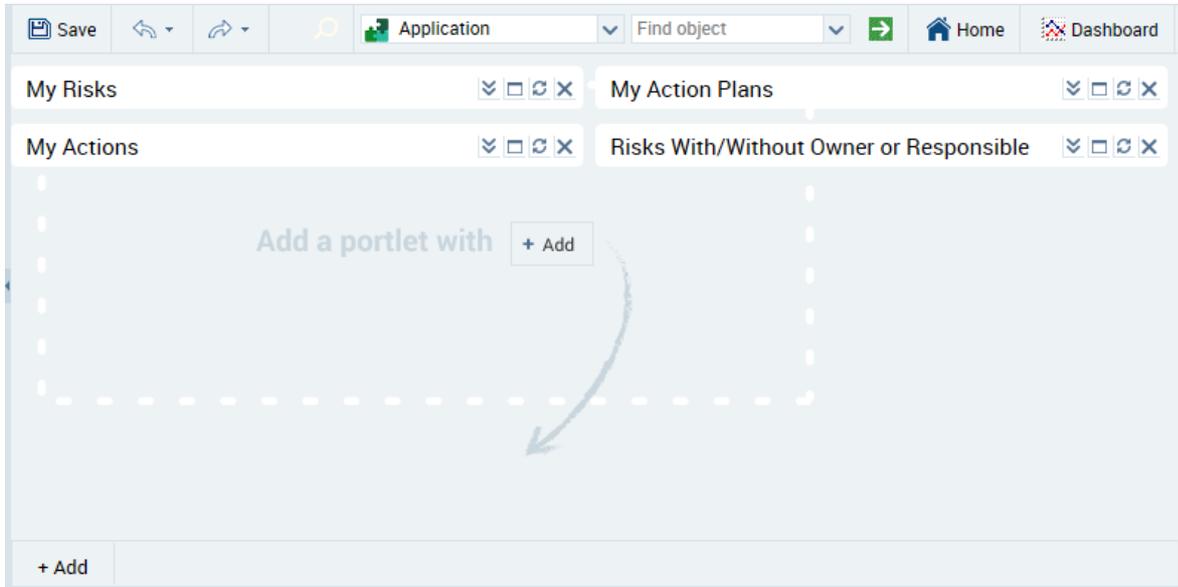


The element is displayed in your dashboard.



4. (Optional) Select other elements.

☺ If you selected a large number of elements, in the element title bar click  to reduce the element. Click  to unfold the element.



USING REPORT IN HOPEX EXPLORER

A company repository can contain a large number of objects. Generating reports that can identify and analyze repository data provides a clearer view of this information.

Reports relate to groups of repository objects and study their interactions.

Example: You can analyze a set of applications to determine their level of functional compatibility with a corresponding city plan.

The analysis platform can be accessed via the Web to enable users to generate reports relating to their own input data.

HOPEX Explorer offers a certain number of ready-to-use reports.

See:

- ["Opening a Report in HOPEX Explorer", page 50](#)
- ["Creating Reports \(Explorer \(RW\) specific\)", page 50](#)
- ["Updating Report Contents", page 53](#)
- ["Converting a report in PDF, RTF, or Excel format", page 53](#)

Opening a Report in HOPEX Explorer

The list of reports and report templates is available in the **Documentation** pane.

To open a report:

1. Select the **Documentation** navigation pane.
2. In the documentation tree, expand the **Reports** folder.
Folders of available **HOPEX** repository report templates appear.
3. Expand the report template folder of which you want to open a report.
4. Click the desired report to open it.
The report is displayed in the read/edit area and comprises report chapters that vary according to the report template.

Creating Reports (Explorer (RW) specific)

☛ *When you have created a report in **HOPEX Explorer**, this report is not saved. You must recreate it if you want to access it later.*

Accessing reports available on an object

On each repository object you can display:

- the list of report templates relating to the object, from which you can create new reports.
- any existing reports.

To access report templates and reports available on an object:

1. Open the properties pages of the object to which the report relates.

Example: an Application.

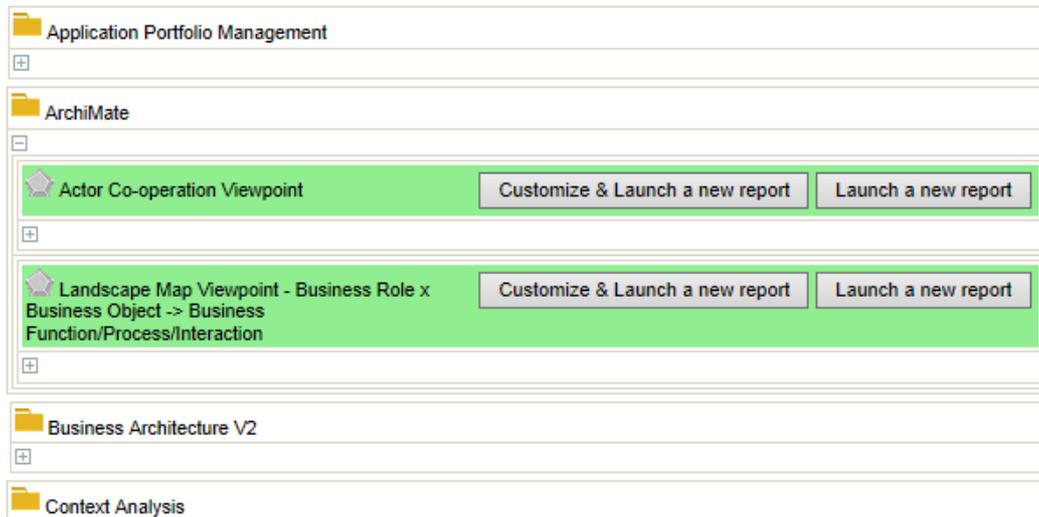
➔ See "[Accessing Object Properties pages](#)", page 23.

2. Click the icon of the object at the left of the different menus and select **Documentation > Report Discovery**.

The list of report templates is displayed in the edit area. They are classified by folders corresponding to different categories.

3. Click  under the folder to view the proposed report templates.

2. Available Reports



Example of report templates available on an application

Report templates can contain one or several parameters. Certain parameters are defined automatically with the value of the selected object. Other parameters must be specified. Depending on the report template, you can:

- directly launch the report
- modify default values and launch the report
- enter missing parameters and launch the report.

➔ See "[Launching a report](#)", page 51.

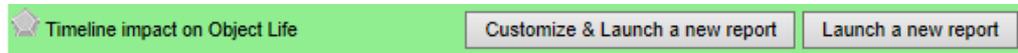
Launching a report

To launch a report:

1. Access the reports available for the object.

➔ See "[Accessing reports available on an object](#)", page 50.

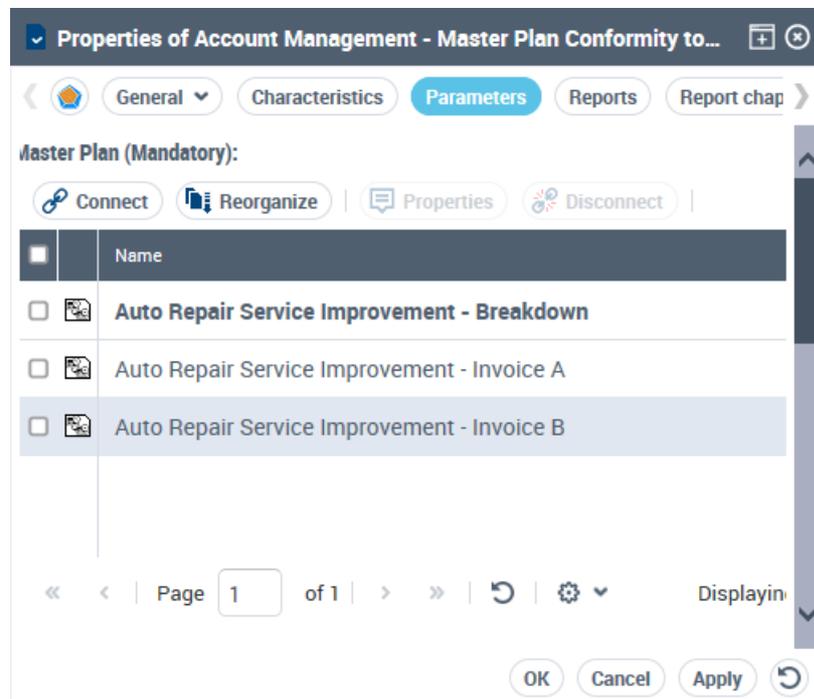
2. If your report template includes only one required parameter, this parameter is automatically entered with the selected object. You can either:
 - launch the report directly (click **Launch a new report**)
The report is displayed in the edit area.
 - modify parameter data to customize the report before launching it (click **Customize & Launch a new report**).
 See step 3.



If your report template includes several mandatory parameters, you must complete the report before launching it (click **Complete**).
See step 3.



3. (optional) When you complete or modify parameters before launching the report, the report **Properties** window appears. The **Parameters** page enables definition of report input data. The parameters define the object groups and their relationship setting in the report. They vary depending on the report template.



☛ For detailed information on how to customize or complete your report, see the **HOPEX Common Features** guide.

4. Click **OK**.
The report results appear in the edit area.

Report chapters that appear vary according to the report template.

1. Click the chapter titles to open them.

Updating Report Contents

If the described object is modified, the report is updated when next opened.

To update an existing report:

1. Click the refresh button  associated with:
 - the report title to regenerate the complete page.
 - the chapter title to regenerate only part of the page.

Converting a report in PDF, RTF, or Excel format

When you open a report, this appears in an HTML page.

To generate this report in PDF, RTF, or Excel format:

1. Access the report.
 - See *"Opening a Report in HOPEX Explorer", page 50*.
2. Click respectively , , or  to the right of the title of the report.
 - *The first time you open a separate window, your navigator may request authorization to open unexpected windows. If this is the case, accept.*

DIFFERENCES BETWEEN EXPLORER READER AND EXPLORER WRITER



Functionalities available or not available for each Explorer Reader and Explorer Writer business role/profile are described here:

- ✓ ["Functionalities Available on the Desktop", page 53](#)
- ✓ ["Functionalities Available Using Diagrams", page 54](#)
- ✓ ["Object Functionalities Available", page 54](#)
- ✓ ["Report Functionalities Available", page 54](#)

Functionalities Available on the Desktop

Desktop functionalities available for Explorer Reader and Explorer Writer are:

- request for change
- workflow
- tile
- time machine
- alerts
- view/add widget
- advanced search

Desktop functionalities available for Explorer Writer only are:

- manage favorites
- manage user options
- widget: update

Desktop functionalities not available are:

- save requests
- import/export tool

Functionalities Available Using Diagrams

Diagram functionality available for Explorer Reader and Explorer Writer is:

- view diagrams

The diagram functionality available for Explorer Writer only is:

- export diagrams

Diagram functionalities not available are:

- create and update diagrams
-

Object Functionalities Available

Object functionalities available for Explorer Reader and Explorer Writer are:

- consult object properties
- save in Excel or PDF format
- create instant reports
- view wall (from the object properties)

Object functionalities available for Explorer Writer only are:

- create objects (excluding diagrams)
- modify object properties
- print wall (from the object properties)
- duplicate/delete/add objects
- copy/paste
- cancel/restore
- dependence and impact
- history
- explore
- check
- manage favorites
- diagram containing object
- transfer

Object functionalities not available are:

- create and update diagrams
-

Report Functionalities Available

Report functionalities available for Explorer Reader and Explorer Writer are:

- view existing reports, books and business documents
- export reports in RTF, Excel, or PDF format

Report functionalities available with Explorer Writer only are:

- edit existing reports, books and business documents
- add notes to existing reports
- report discovery
- create new reports
- edit the PDF print layout

