

HOPEX Explorer

User guide



HOPEX V3

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INTRODUCTION TO HOPEX EXPLORER



HOPEX Explorer offers an easy to navigate and user-friendly **HOPEX** desktop. Users have access to data specific to their connection profile.

HOPEX Explorer offers direct and dynamic access to **HOPEX** repositories. Users can query the **HOPEX** repository and dynamically generate reports according to their context and preferences.

HOPEX Explorer is available in tablet version.

CONNECTION TO HOPEX EXPLORER

HOPEX Explorer Connection Profiles

The **HOPEX Explorer** desktop is a simplified desktop that facilitates navigation. You access it in browse mode in a work environment adapted to you.

A profile and its associated lite profile have access to the same objects with the same rights.

HOPEX Explorer connection profile types

Two types of profiles provide access to the **HOPEX Explorer** desktop:

- **Browse type profiles**

Browse type profiles are used to browse in **HOPEX Explorer** and perform customization and collaboration actions that do not modify the objects of the **HOPEX** repository.

➤ See ["Functionalities Available to All Profiles", page 19](#).

In the properties pages of a browse type profile, its **Command Line** attribute contains /HV.

➤ See ["Products accessible on the license \(Command Line\)", page 45](#).

Example: Application Viewer Lite.

- **Contribution type profiles**

Contribution type profiles are used to navigate in **HOPEX Explorer**, perform customization actions without impacting the **HOPEX** repository, and perform modification actions that can modify the **HOPEX** repository objects.

➤ See ["Functionalities Available to All Profiles", page 19](#) and ["Additional Functionalities Available to Contribution Type Profiles", page 21](#).

In the properties pages of a contribution type profile, its **Command Line** contains /HC.

➤ See ["Products accessible on the license \(Command Line\)", page 45](#).

Example: Application owner lite.

Example of a browse type profile

The **Application Viewer Lite** profile is a browse type profile that provides access to:

- the **HOPEX Explorer** desktop in a work environment adapted to the **Application Viewer** profile.
- the same objects and the same functionalities as the **Application Viewer** profile.

Example of a contribution type profile

The **Application Owner Lite** profile is a contribution type profile that provides access to:

- the **HOPEX Explorer** desktop in a work environment adapted to the **Application Owner** profile.
- the same objects and the same functionalities as the **Application Owner** profile.

Accessing HOPEX Explorer

To connect to **HOPEX Explorer**:

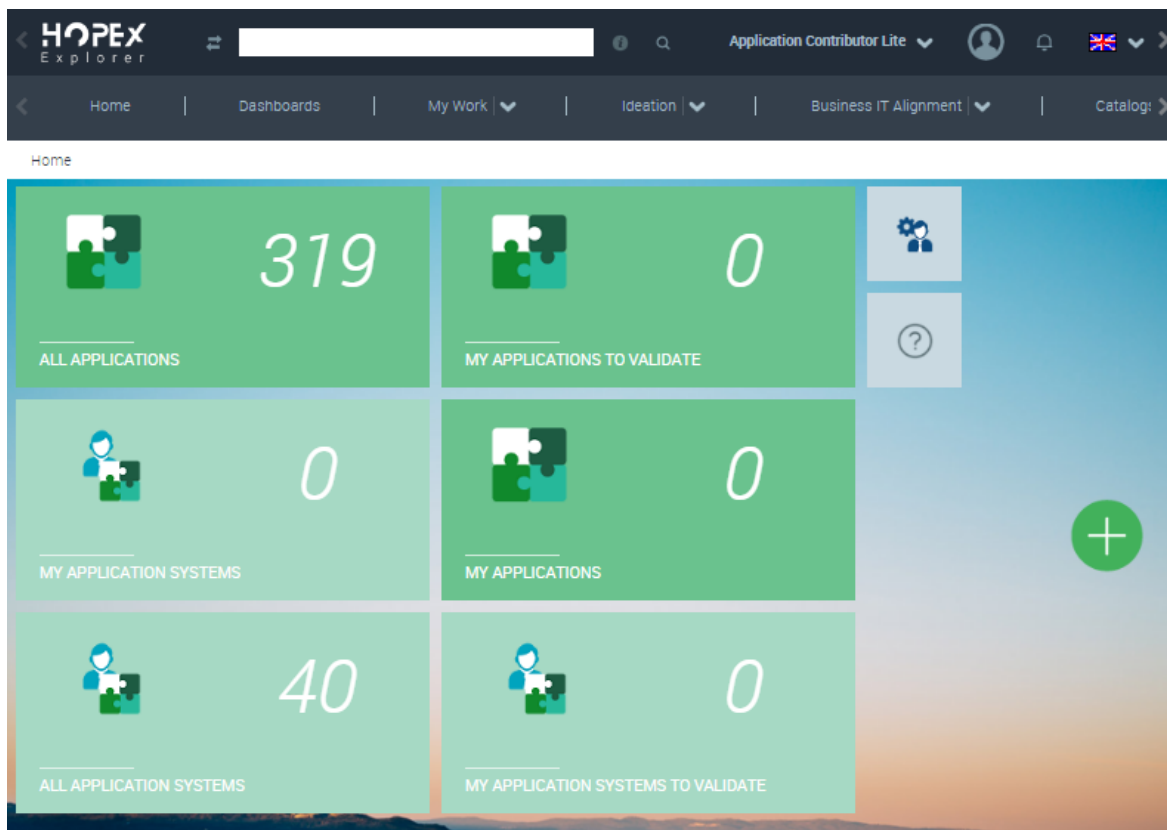
1. Connect to HOPEX (Web Front-End) with one of the **HOPEX Explorer** connection profiles.

➤ See ["Accessing HOPEX Web Front-End", page 26.](#)

➤ See ["HOPEX Explorer Connection Profiles", page 3.](#)

The home page of the **HOPEX Explorer** desktop appears and a session opens in browse mode.

➤ *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.*



The layout of the **HOPEX Explorer** desktop adapts to its support (PC or tablet).

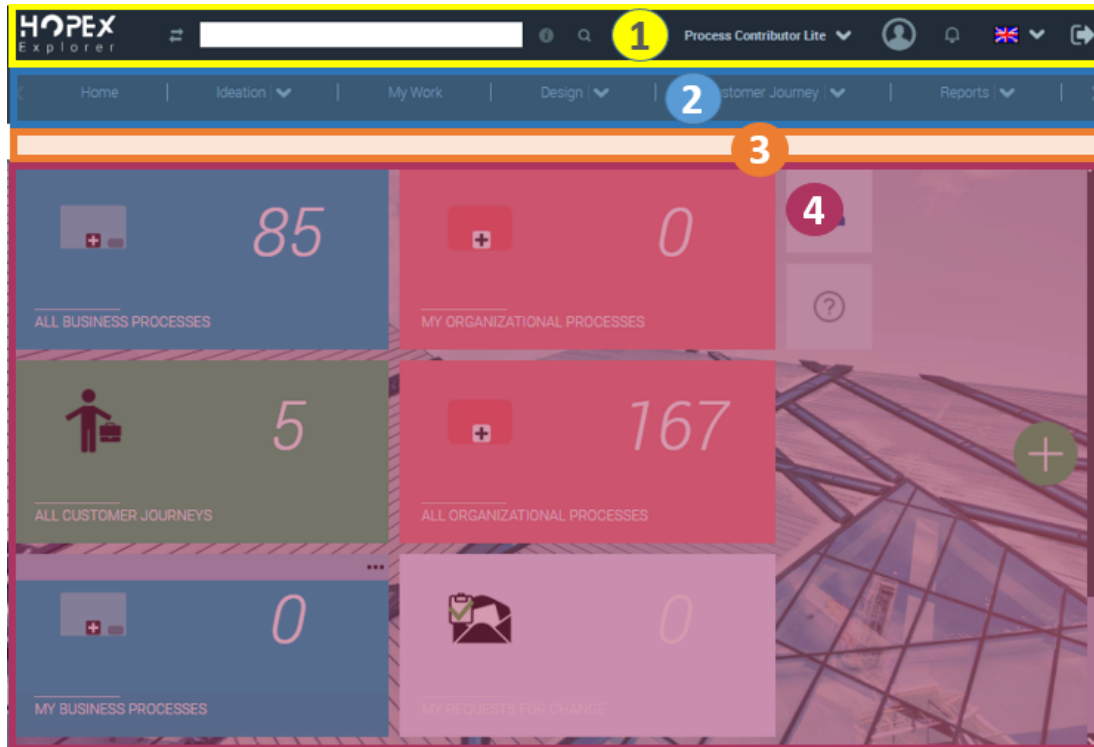
➤ See ["Description of the HOPEX Explorer Desktop", page 6.](#)

➤ See ["Description of the HOPEX Explorer Desktop \(tablet\)", page 11.](#)

The home page and the **HOPEX Explorer** menus are specific to the profile you used for connection.

DESCRIPTION OF THE HOPEX EXPLORER DESKTOP

All **HOPEX Explorer** desktops appear as follows:



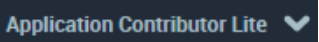
1: Toolbar, 2: Navigation tabs, 3: Breadcrumb, 4: Navigation zone (viewing or editing).

The **HOPEX Explorer** desktop includes:

- a **toolbar**
 - **navigation tabs** to display the lists and trees of available objects in the navigation zone.
 - a **breadcrumb** to access the last pages already viewed (in the same context).
 - a **navigation area** to view objects.
- By default, you are working in browse mode. If required, and depending on your profile, a button is available to switch to edit mode as necessary.

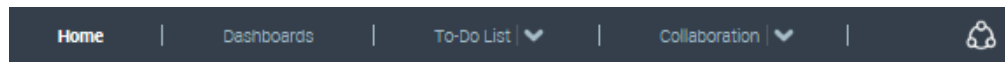
Toolbar

The toolbar is common to all **HOPEX Explorer** desktops and available in all pages of the **HOPEX Explorer** desktop.

-    enables full-text search (the repository must be indexed) and object type search.
 See ["Searching Objects \(Web Front-End\)", page 265.](#)
-  indicates the connexion profile and enables to switch to another profile without exiting **HOPEX**.
 See ["Switching Between Profiles", page 30.](#)
-  displays the name of the **HOPEX** user used for mapping and its connection characteristics (profile, repository, environment).
-  indicates the number of unread notifications and provides access to notifications.
 ["Managing my notifications", page 522](#)
-  is used to modify the data display language.
 See ["Changing the Data Display Language", page 31.](#)
-  **Disconnection** is used to disconnect from the **HOPEX Explorer** desktop.

Navigation Tabs

 See ["Navigating in HOPEX Explorer", page 16.](#)

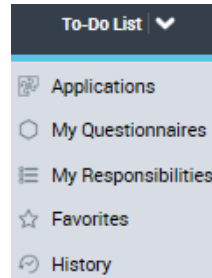


The following tabs are common to all **HOPEX Explorer** desktops:

- Home**, which provides quick access to objects (via tiles), to the Documentation, and to Notification Management.
 See ["The Home Page", page 38.](#)
 See ["Customizing the Home Page of your Desktop", page 67.](#)
- Dashboard**, which provides access to your widgets.
 See ["Customizing your Dashboard", page 69.](#)

The other navigation tabs are specific to the profile used for connection to **HOPEX Explorer**.

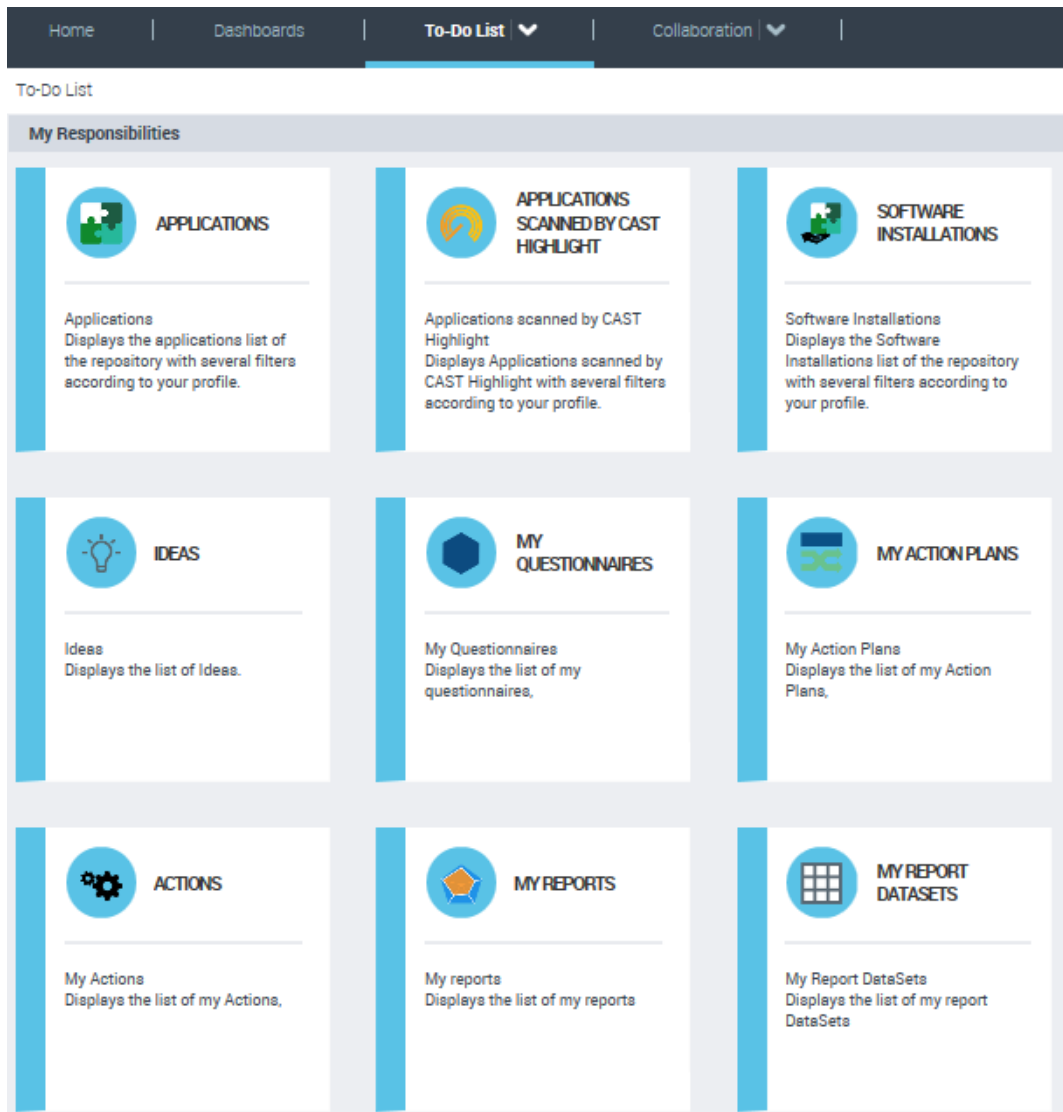
- Each navigation tab has a drop-down list; each menu thus provides access to a page with its associated tiles.



When you click the tab itself, it displays one of these pages.

Example: The **To-Do-List** tab displays **My Responsibilities** page.

- Each menu is used to display the tiles that give access to the lists and trees of objects available with your connection profile.



To the far right of the navigation menus, the **Collaboration**  menu enables to display the collaboration tabs.

➡ See ["Displaying a Collaboration Feature"](#), page 485.

Breadcrumb

... / Applications / Account Management / Sale to the professionals

The breadcrumb is available on all **HOPEX Explorer** desktops. It keeps the last pages (in the same context) that you viewed so you can reopen them easily if needed.

Only the last three pages viewed are displayed.

To access an older page:

- Click the ... and select the page you want to access.

The breadcrumb trail is reset when you change context.

Navigation Zone

By default, on connection to **HOPEX Explorer**, the desktop opens in browse mode and displays the **Home page** with:

See ["Work Modes in HOPEX Explorer", page 18](#).

- connection profile specific tiles, which give direct access to a list of objects.

Example: the list of all your applications.

- quick access generic tiles.

Eg.: the **Help** tile to access the documentation.

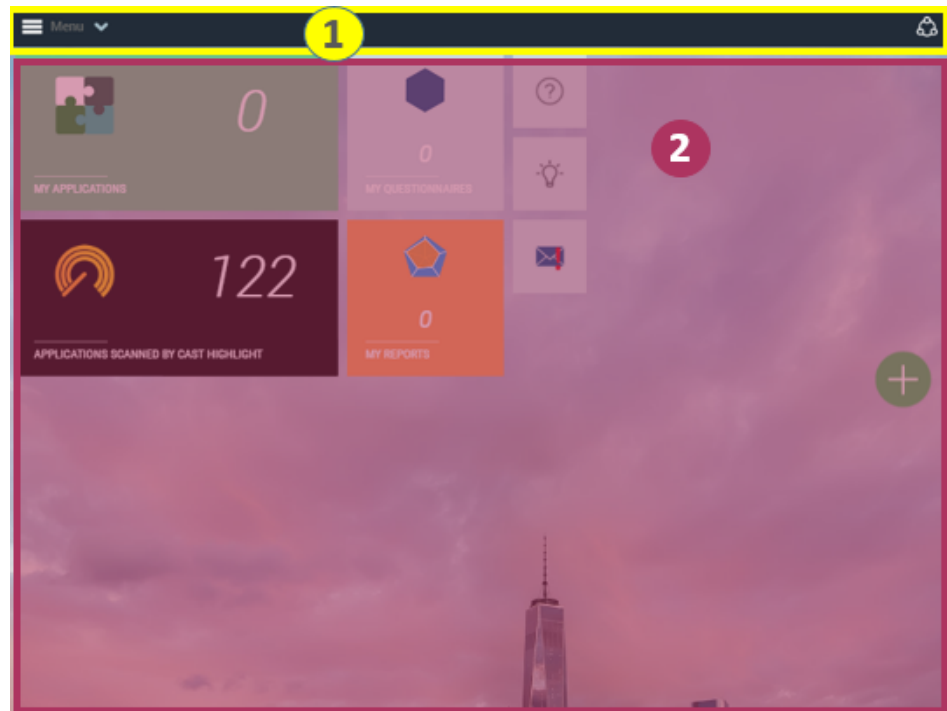
See ["The Home Page", page 38](#).

- an add tile button .

To customize your Home page, see ["Customizing the Home Page of your Desktop", page 67](#).

DESCRIPTION OF THE HOPEX EXPLORER DESKTOP (TABLET)

All **HOPEX Explorer** (tablet) desktops appear as follows:



1: Header bar, 2: Navigation zone (viewing or editing).

The **HOPEX Explorer** desktop (tablet) contains:

- a **header bar** to navigate and access the Collaboration features.
- a **navigation area** to view objects.

By default, you are working in browse mode. If required, and depending on your profile, a button is available to switch to edit mode as necessary.

👉 See ["Changing Work Mode", page 22](#).

Header Bar

The header bar is common to all **HOPEX Explorer** (tablet) desktops and available in all pages of the **HOPEX Explorer** (tablet) desktop. It includes:

- a navigation menu 
- a breadcrumb
 - See ["Breadcrumb", page 10.](#)
- (landscape mode) a collaboration access button  that displays the collaboration tabs.
 - See ["Displaying a Collaboration Feature", page 485.](#)

Navigation menu

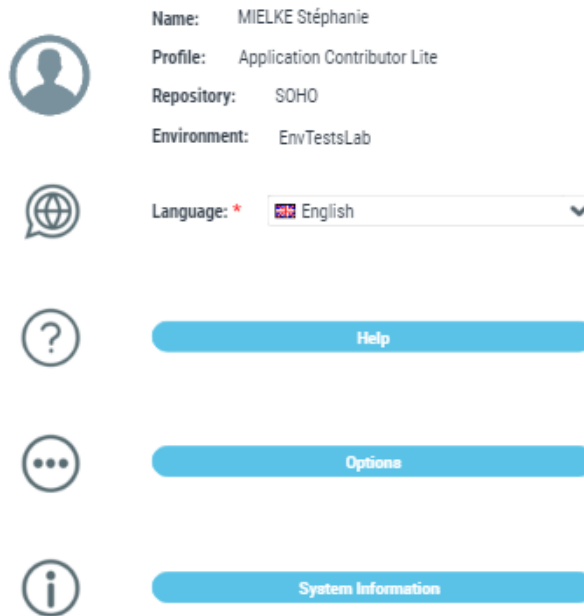
The navigation menu  gives access to:

- the full-text search  (the repository must be indexed).
 - See ["The Full-text Search.", page 268.](#)
- navigation panes common to all the **HOPEX Explorer** (tablet) desktops.
 - See ["Navigation panes common to all HOPEX Explorer \(tablet\) desktops", page 13.](#)
- navigation panes specific to the profile used for connecting to **HOPEX Explorer** (tablet).
 - See ["Profile-specific navigation panes", page 13.](#)

Navigation panes common to all HOPEX Explorer (tablet) desktops

The navigation menu provides access to the navigation panes common to all the **HOPEX Explorer** (tablet) desktops:

- **Home**, which provides quick access to objects (via tiles) and to the documentation.
 - ☛ See *"The Home Page", page 38.*
 - ☛ See *"Customizing the Home Page of your Desktop", page 67.*
- **Dashboard**, which provides access to your widgets.
 - ☛ See *"Customizing your Dashboard", page 69.*
- **Settings**, which displays the name of the **HOPEX** user used for mapping and its connection characteristics (profile, repository, environment). Use this page to:
 - modify the data display language (**Language**)
 - access the documentation (**Help**)
 - access options (**Options**)
 - access the information system report (**Information system**)



- **Exit**, to leave the **HOPEX Explorer** (tablet) application.

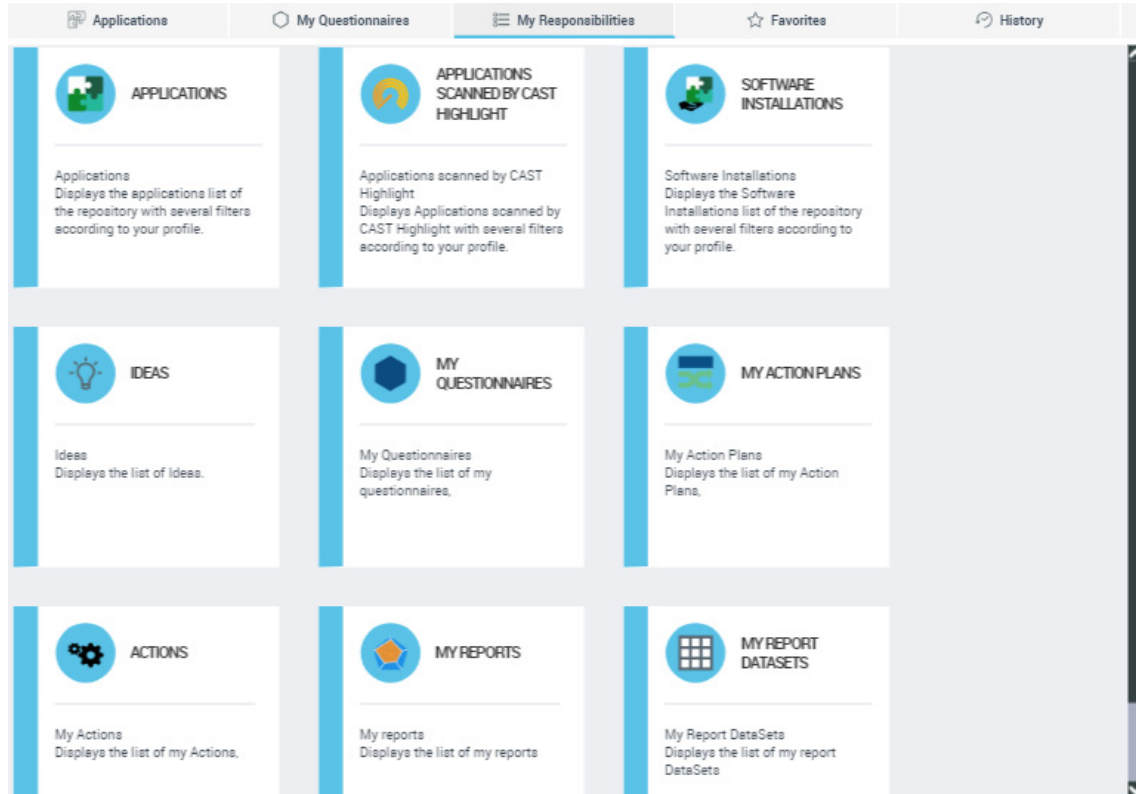
Profile-specific navigation panes

The navigation menu provides access to navigation panes, which are specific to the profile used for connection to **HOPEX Explorer** (tablet).

Each specific navigation pane contains one or more pages accessible via tabs. Each page displays its associated tiles.

When you click on a navigation pane, it displays the page of one of its tabs with its associated tiles.

Example: The **To-Do-List** navigation pane displays the **My Responsibilities** tab and presents its associated tiles.



Click another tab to display its tiles.

➡ See ["Navigating in HOPEX Explorer", page 16.](#)

Navigation Area

By default, on connection to **HOPEX Explorer**, the desktop opens in browse mode and displays the **Home page** with:

➤ See ["Work Modes in HOPEX Explorer", page 18.](#)

- connection profile specific tiles, which give direct access to a list of objects.

Example: the list of all your applications.

- quick access generic tiles.

Eg.: the **Help** tile to access the documentation.

➤ See ["The Home Page", page 38.](#)

- an add tile button .

➤ To customize your Home page, see ["Customizing the Home Page of your Desktop", page 67.](#)

WORKING IN HOPEX EXPLORER

Navigating in HOPEX Explorer

Irrespective of the support with which you are working, the pages you access are identical.

Navigation is slightly different depending on your support:

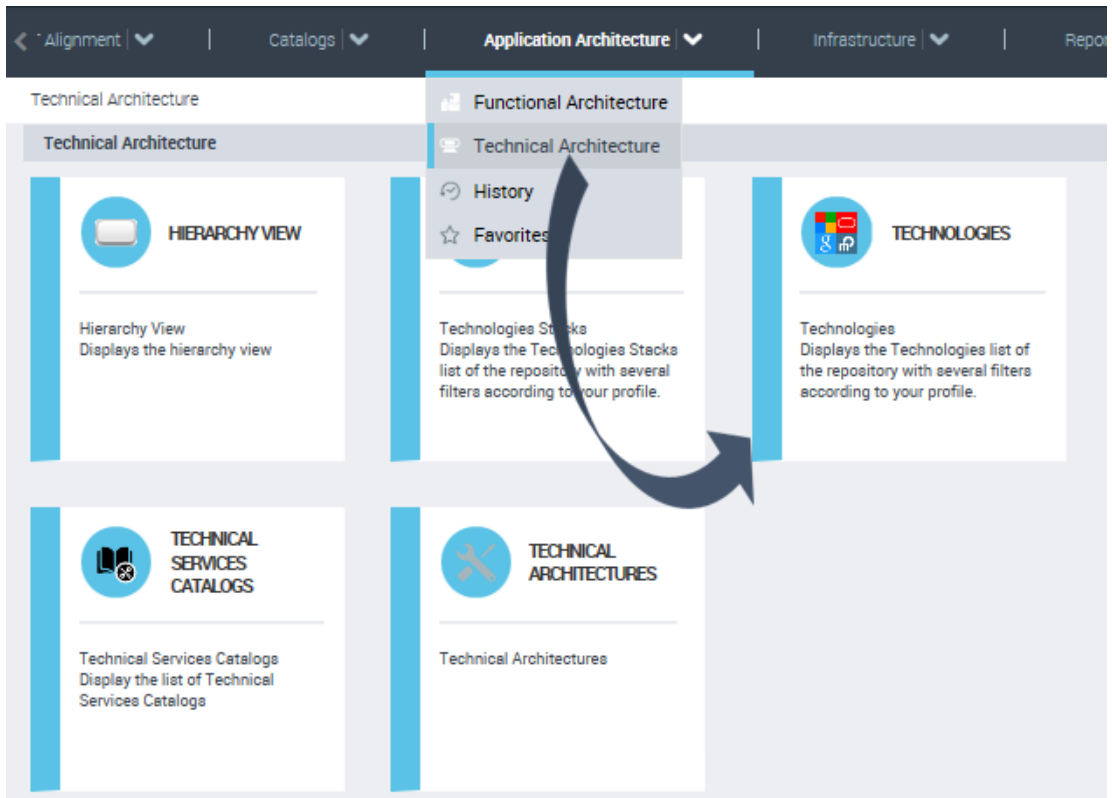
- In the **HOPEX Explorer** desktop, you navigate with navigation tabs.
- In the **HOPEX Explorer** (tablet) desktop, you navigate via the navigation **Menu** .

Example: Accessing technologies in HOPEX Explorer

To access technologies in **HOPEX Explorer** :

1. Connect to **HOPEX Explorer** with the **Application Contributor (lite)** profile.
2. In the **Application Architecture** tab, click the drop-down menu and select **Technical Architecture**.
The **Technical Architecture** page opens.

3. Click the **Technologies** tile.



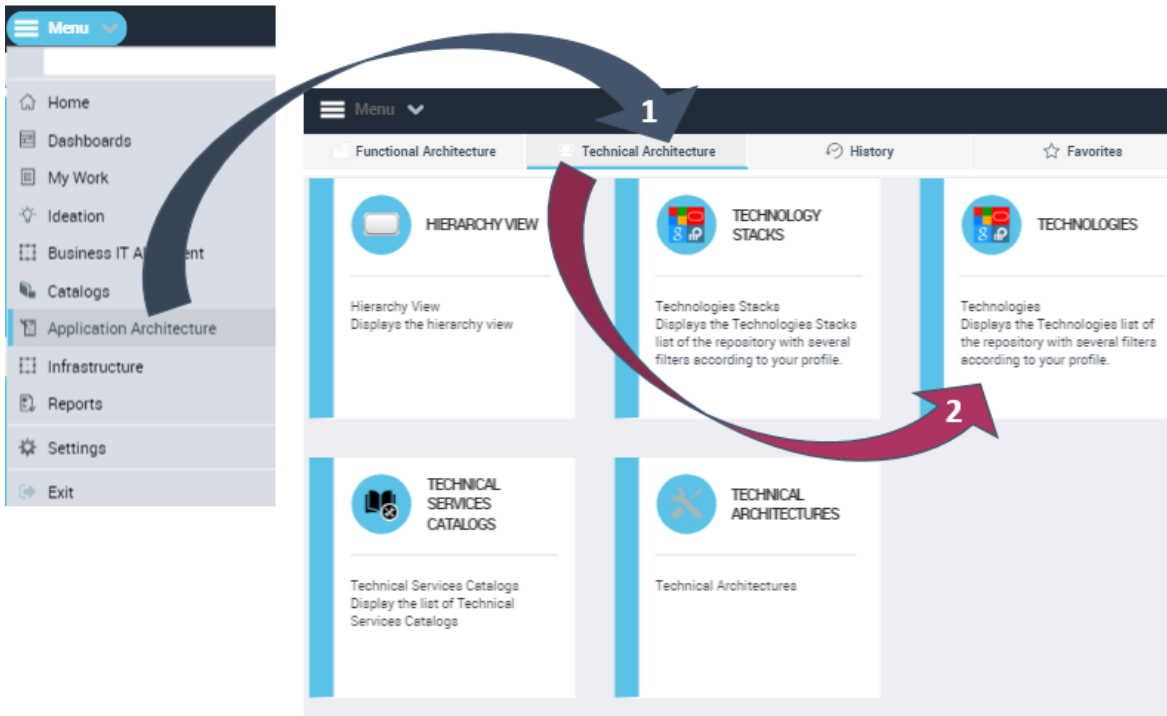
The list of technologies is displayed.

Example: Accessing technologies in HOPEX Explorer (tablet)

To access Technologies in **HOPEX Explorer** (tablet):

1. Connect to **HOPEX Explorer** (tablet) with the **Application Contributor (lite)** profile.
2. Click the navigation **Menu**  and select **Application Architecture**. The **Application Architecture** navigation pane appears in the **Functional Architecture** tab.
3. Click the **Technical Architecture** tab. The **Technical Architecture** page opens.

- Click the **Technologies** tile.



The list of technologies is displayed.

Work Modes in HOPEX Explorer

The **HOPEX Explorer** desktop is a simplified desktop that offers two work modes.

- Browse mode (default)
- Edit mode

To change your work mode, see ["Changing Work Mode", page 22](#).

Browse mode

This is the current work mode for all profiles.

Irrespective of your profile for connecting to **HOPEX Explorer**, you access your desktop in browse mode. You can:

- browse and view objects.
Eg.: search objects, view diagrams.
- perform actions that do not modify the objects in the repository.
Eg.: create instant reports, add tags, add review notes.

See ["Functionalities Available to All Profiles", page 19](#).

You cannot update objects in the repository in browse mode.

Edit mode

With an edit type profile (connection to **HOPEX Explorer**), you can switch as necessary to edit mode to modify, create, and delete objects.

Property page fields are editable.

Eg.: modify the value of an object attribute.

➤ See ["Additional Functionalities Available to Contribution Type Profiles", page 21.](#)

Functionalities Available to All Profiles

By default, irrespective of your profile for connecting to the **HOPEX Explorer** desktop, you access your desktop in browse mode.

The functionalities available on the **HOPEX Explorer** desktop can be restricted according to the permissions defined for the profile used for connection.

Example: Process Contributor Lite

➤ See ["Managing UI Access \(Permissions\)", page 183.](#)

Functionalities Available in the HOPEX Explorer Desktop

In browse mode in the **HOPEX Explorer** desktop, the following functionalities are available:

- full-text search on objects
➤ See ["The Full-text Search.", page 268.](#)
- object type search
➤ See ["The Search by Object Type", page 277.](#)
- your home page customization: adding and removing tiles.
➤ See ["Customizing the Home Page of your Desktop", page 67.](#)
- your dashboard customization: adding and removing widgets.
➤ See ["Customizing your Dashboard", page 69.](#)
- access to options: viewing and modifying
➤ See ["Navigation Tabs", page 7.](#)
- favorite management.
➤ See ["Managing Favorites", page 185.](#)
- access to reports.
➤ See ["Accessing Analysis Reports", page 342.](#)
- access to your notifications on objects.
➤ See ["Managing my notifications", page 522.](#)
- access to the **Collaboration** window.
➤ See ["Displaying a Collaboration Feature", page 485.](#)

Functionalities available in a diagram

In browse mode in the **HOPEX Explorer** desktop, the following functionality is available for a diagram:

- viewing the diagram.
 See *"Opening a Diagram", page 32* and *"Handling a Diagram", page 34*.

Functionalities available in a report

In browse mode in the **HOPEX Explorer** desktop, the following functionalities are available in the reports:

- viewing
- exporting in Excel format
- printing
- refreshing
 See *"Accessing Analysis Reports", page 342*.

Functionalities available on an object

In browse mode in the **HOPEX Explorer** desktop, the following functionalities are available on an object in a list:

- accessing object properties (modification not available).
 See *"Accessing Object Properties", page 172*.
- viewing the reports available on the object (creation not available).
 See *"Specific reports embedded in an object", page 343*.
- accessing the diagrams that contain the object.
 See *"Opening a Diagram", page 32*.
- customizing: adding the object to the home page or to favorites.
 See *"Actions on an object from the Local Name of a list", page 62*.
- accessing the diagrams describing or containing the object.
 See *"Actions on an object from the Local Name of a list", page 62*.
- instant report creation.
 See *"Launching an instant report from a list", page 397*.
- Social: liking and following the object.
- accessing the Workflow transitions.
- Excel export.
- use of all the collaboration functionalities on an object:
 See *"Accessing collaboration in HOPEX", page 482*.
- Review notes
 See also *"Specificity regarding the review notes", page 28*.
- Workflow transitions
- Activity feed
- Social: tags, liking and following an object
- Ideation.

Functionalities available on a list of objects

In browse mode on the **HOPEX Explorer** desktop, the following functionalities are available on a list of objects:

- instant report creation.
➤ See *"Launching an instant report from a list", page 397.*
- accessing the Workflow transitions.
➤ See *"Using Workflows", page 551.*
- Excel export.
➤ See *"Exporting an object List in Excel Format", page 245.*

Additional Functionalities Available to Contribution Type Profiles

- See *"HOPEX Explorer Connection Profiles", page 3.*

Functionalities available on objects

In edit mode, the following additional functionalities are available on objects with contribution type profiles:

- object creation.
- object deletion.
- object property modification.
- accessing the pop-up menu of an object (in a list or in its properties page) and all associated commands (e.g.: Copy, Manage, History).
- modification of diagrams via tabular input (diagram editing not available).
- report creation.

Functionalities available on diagrams

In edit mode, the following additional functionality is available on diagrams with contribution type profiles:

- export in PPT format (Documentation > Export the Diagrams)
➤ See *"Exporting Diagrams to PowerPoint", page 155.*

Functionalities available on report

In edit mode, the following additional functionalities are available for reports with contribution type profiles:

- editing the report
- adding notes to existing reports
- report discovery
- creating reports
➤ See *"Creating an Analysis Report", page 347.*

Functionalities Not Available in HOPEX Explorer

Some functionalities are not available with the **HOPEX Explorer** desktop, for example:

- import
- creating and updating diagrams
- canceling/restoring
- advanced searches
- saving requests

Changing Work Mode

By default, you are working in browse mode in your **HOPEX Explorer** desktop.

With a contribution type profile, you can modify repository objects. For this, you must work in edit mode.

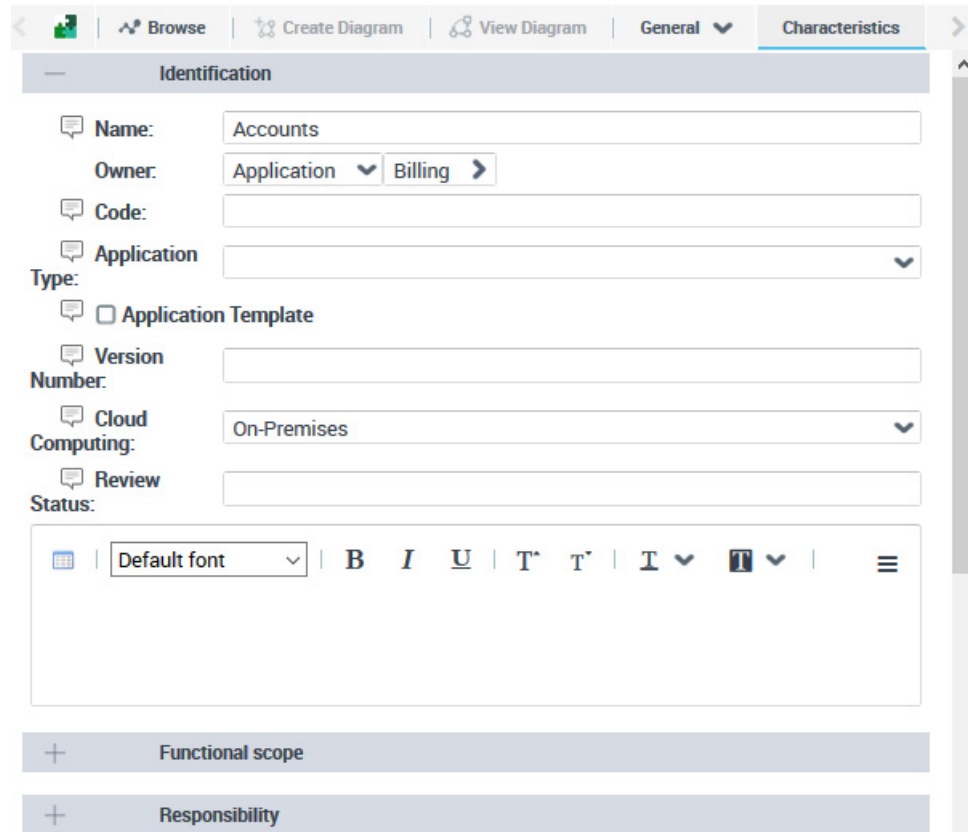
➡ See ["Additional Functionalities Available to Contribution Type Profiles", page 21.](#)

To change work mode (contribution type profile):

1. In your **HOPEX Explorer** desktop, to change work mode, you must be in a location that allows this option and have the appropriate permission:
 - Under the breadcrumb, click **Edit** .
 - or
 - In the tab bar of the properties pages, click **Edit** .

➡ To return to browse mode, click **Browse** .

Example: In a property page, fields are editable.



The screenshot shows the 'Identification' properties page in the HOPEX Explorer. The top navigation bar includes 'Browse', 'Create Diagram', 'View Diagram', 'General', and 'Characteristics'. The 'Characteristics' tab is active. The 'Identification' section contains the following fields:

- Name:** Accounts
- Owner:** Application (dropdown) | Billing (dropdown)
- Code:** (text input)
- Application Type:** (dropdown menu)
- Application Template:** ☐
- Version Number:** (text input)
- Cloud Computing:** On-Premises (dropdown)
- Review Status:** (text input)

Below the fields is a rich text editor with a toolbar containing icons for font color, font family, bold, italic, underline, text color, text background color, and list/bulleted points. At the bottom, there are two expandable sections: 'Functional scope' and 'Responsibility'.

2. Perform your update.
When you change pages, you return automatically to **Browse** mode.
➡ To stay on the same page and return to browse mode, click **Browse** .

Switching to another Desktop without Logging Out

In your **HOPEX Explorer** desktop, at anytime, you can switch to another desktop without logging out. Thus, you quickly access another desktop and other functionalities.

To switch to another desktop:

1. In your **HOPEX Explorer** desktop, in the tool bar, click your current profile drop-down list.
 See ["Toolbar", page 7](#).
2. Select the profile with which you want to connect.
3. (If you made modifications in your private workspace) Click:
 - **Yes**, to save your modifications in the repository.
 - **No**, if you do not want to save in the repository the modifications you made since your last dispatch. Modifications to your desktop are also lost.
 Click **Cancel** to stay in your private workspace.

The profile corresponding desktop is displayed.

USING HOPEX EXPLORER



See:

- ✓ ["Managing Objects", page 27](#)
- ✓ ["Changing the Data Display Language", page 31](#)
- ✓ ["Using Diagrams", page 32](#)
- ✓ ["Managing Favorites in HOPEX Explorer", page 37](#)

MANAGING OBJECTS

You can perform actions from objects contained in different type 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 27](#)
- ["Accessing Object Properties pages", page 27](#)
- ["Modifying Object Properties \(Contribution type profile\)", page 29](#)
- ["Managing Objects", page 29](#)

Accessing Objects

In **HOPEX Explorer**, you can for example access an object from:

- a search result
 - See ["Quick Search \(Web Front-End\)", page 267](#).
- a diagram
 - See ["Using Diagrams", page 32](#).
- a property page
 - See ["Accessing Object Properties pages", page 27](#).
- a tree
 - See for example the tree of your favorites, ["Accessing your favorites", page 38](#).
- a list
 - For example, in your desktop home page, click a tile that displays a list of objects.

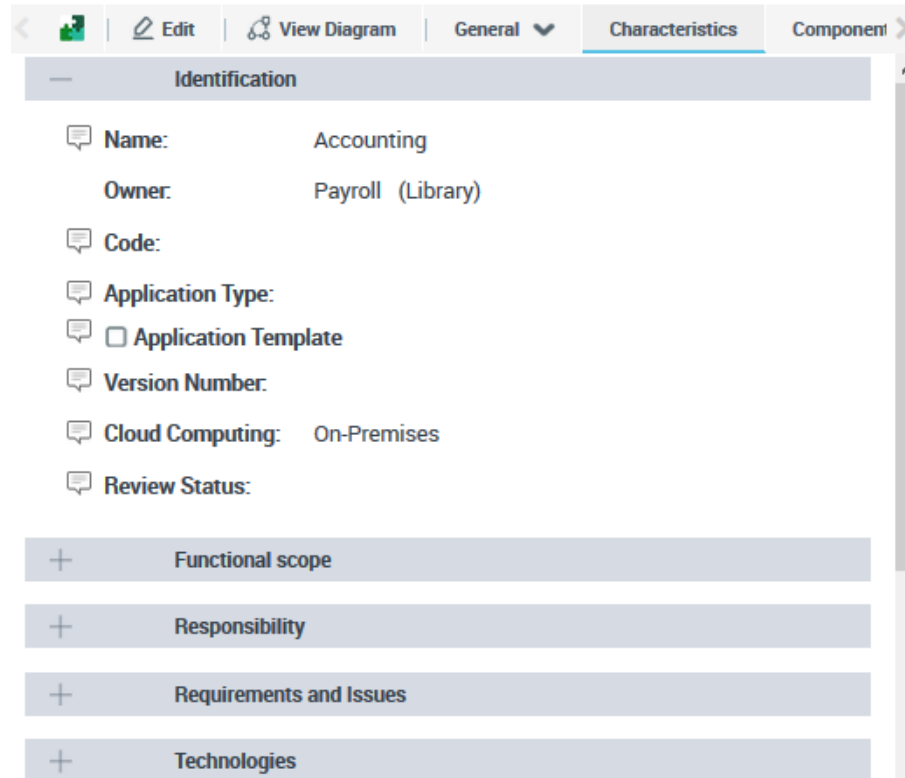
Accessing Object Properties pages

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

To access Properties pages of an object:

1. Access the object, see ["Accessing Objects", page 27](#).

2. Click the object.
The object properties appear in the navigation 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.



From the object Properties page, you can:

- consult the object properties
- (edit mode) add review notes
- (Contribution type profile) modify the object properties
 See ["Modifying Object Properties \(Contribution type profile\)", page 29.](#)
- (Contribution type profile) perform actions on this object
 See ["Managing an object from its property pages \(contribution profile type \)", page 29.](#)

Specificity regarding the review notes

In **HOPEX Explorer**, in the property pages of an object, the icon:

-  indicates that you can display or create a review note on the object attribute alongside.
-  indicates the object attribute concerned by the review note.

Modifying Object Properties (Contribution type profile)

In **HOPEX Explorer**, with a contribution type profile you can modify object properties.

➤ See ["HOPEX Explorer connection profile types", page 3](#).

To modify an object properties:

1. Access the Properties pages of the object.

➤ See ["Accessing Objects", page 27](#).

2. Click **Edit**  to switch to edit mode.
Fields are editable.

➤ See ["Changing Work Mode", page 22](#).

3. Modify the object properties.

4. If necessary, display other Properties pages of the object to modify its properties.

➤ As long as you remain in the object Properties pages, you remain in edit mode.

😊 To navigate to another object, use the breadcrumb trail; see ["Breadcrumb", page 9](#).

Managing Objects

In **HOPEX Explorer**, the functionalities available on objects depends on your **HOPEX Explorer** connection profile type.

➤ See ["Working in HOPEX Explorer", page 16](#).

Managing objects from a diagram

To manage an object from a diagram, see ["Handling a Diagram", page 34](#).

Managing an object from its property pages (contribution profile type)

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

- **Diagrams Containing Object** to access the diagrams containing the object.
- **New** to create a new object.
- **History** to consult the history of actions performed on the object.
- **Documentation > Report Discovery** or **New Report (MS Word)** to find a report or create a Report (MS Word) on the object.
- **Copy** to copy the object.
- **Add to Favorites** to add the object to your favorites list.
- **Remove** to delete the object from the repository.
- **Explorer** to explore the object.
- **Manage** for example to duplicate, add to home page, compare and align, merge, send a request for change.

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

1. Access the Properties pages of the object.
 See ["Accessing Objects", page 27.](#)
2. Click **Edit**  to switch to edit mode.
Fields are editable.
 See ["Changing Work Mode", page 22.](#)
3. From the Properties page menu bar, click the object icon and select the action you want to perform.
 *Actions that are available depend on the object. Actions not available on the object are grayed.*

Managing an object from a list

You can manage an object from a list.

 See ["Actions on a List of Objects", page 57.](#)

To manage an object from a list:

1. Display a list.
 *For example, in your home page click a tile that displays a list of objects.*
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.*
3. In the menu bar of the list, click the action you want to perform.
 Click  to access hidden actions.

CHANGING THE 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  language abbreviation in the desktop toolbar.

➤ See ["Toolbar", page 7](#).

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

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

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

USING DIAGRAMS

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

See:

- ["Opening a Diagram", page 32](#)
- ["Handling a Diagram", page 34](#)

Opening a Diagram

You can open a diagram:

- in the navigation area
- (Contribution type profile) in a floating window

Opening a diagram in the navigation area (any profile type)

For example, you can open a diagram in the navigation area from:

- an object search result (click the result)
 ➤ See ["Presentation of the Quick Search Tool", page 182](#).
- the tree of your favorites (click the link alongside the  icon)
 ➤ See ["Accessing your favorites", page 38](#).
- a list of objects (**Local Name** column)

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

To open a diagram concerning an object:

1. In **HOPEX Explorer**, display an object list.
2. Select the object concerned.
3. Roll the mouse over the object row concerned.
The icons are displayed in the **Local Name** cell.
4. In the object **Local Name** cell, click:

➤ If needed, click **More**  to access the button.

- **Open/Preview the diagram**  to open the diagram describing the object. Several diagrams can describe the object.

The diagrams describing the object are displayed in the navigation area.

- **Diagrams Containing Object**  to open the diagram including the object. Several diagrams can include the object.

The diagrams including the object are displayed in the navigation area.

➤ See ["Navigating between diagrams", page 35](#).

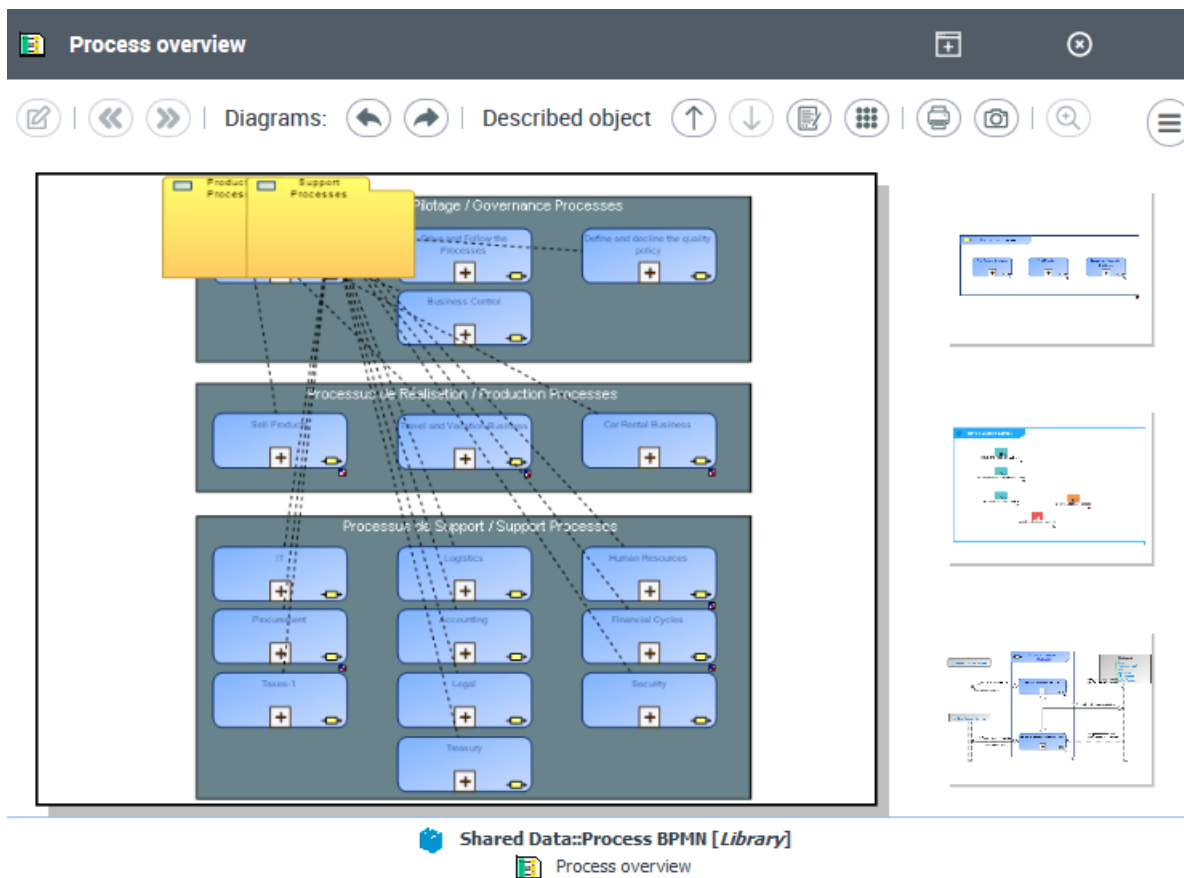
➤ See ["Handling a Diagram", page 34](#).

Opening a diagram in a floating window (contribution type profile)

From an object Properties pages, you can open the diagrams containing the object, in a floating window.

To open a diagram in a floating window (contribution type profile):

1. Access the Properties pages of the object concerned.
 ➤ See ["Accessing Object Properties pages", page 27.](#)
2. Click **Edit**  to switch to edit mode.
 ➤ See ["Changing Work Mode", page 22.](#)
3. In the object Properties page menu bar, click the object icon and in the drop down list select **Diagrams Containing Object** .
 A window appears with all the diagrams that include the selected object.



4. Click the diagram you want to access.
 The diagram is displayed.
 ➤ See ["Navigating between diagrams", page 35.](#)

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.
- **Previous**  / **Next**  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.
- **Properties of described object**  to open the properties page of the object selected in the diagram.
- **Menu**  to access the pop-up menus of the object described by 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 dark grey.

The selected option is blue.

Unavailable options are light grey.

2. Click the part that represents the action you want to perform:
 - access object properties 
 - create a report on the object 
 - open other diagrams containing/citing 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

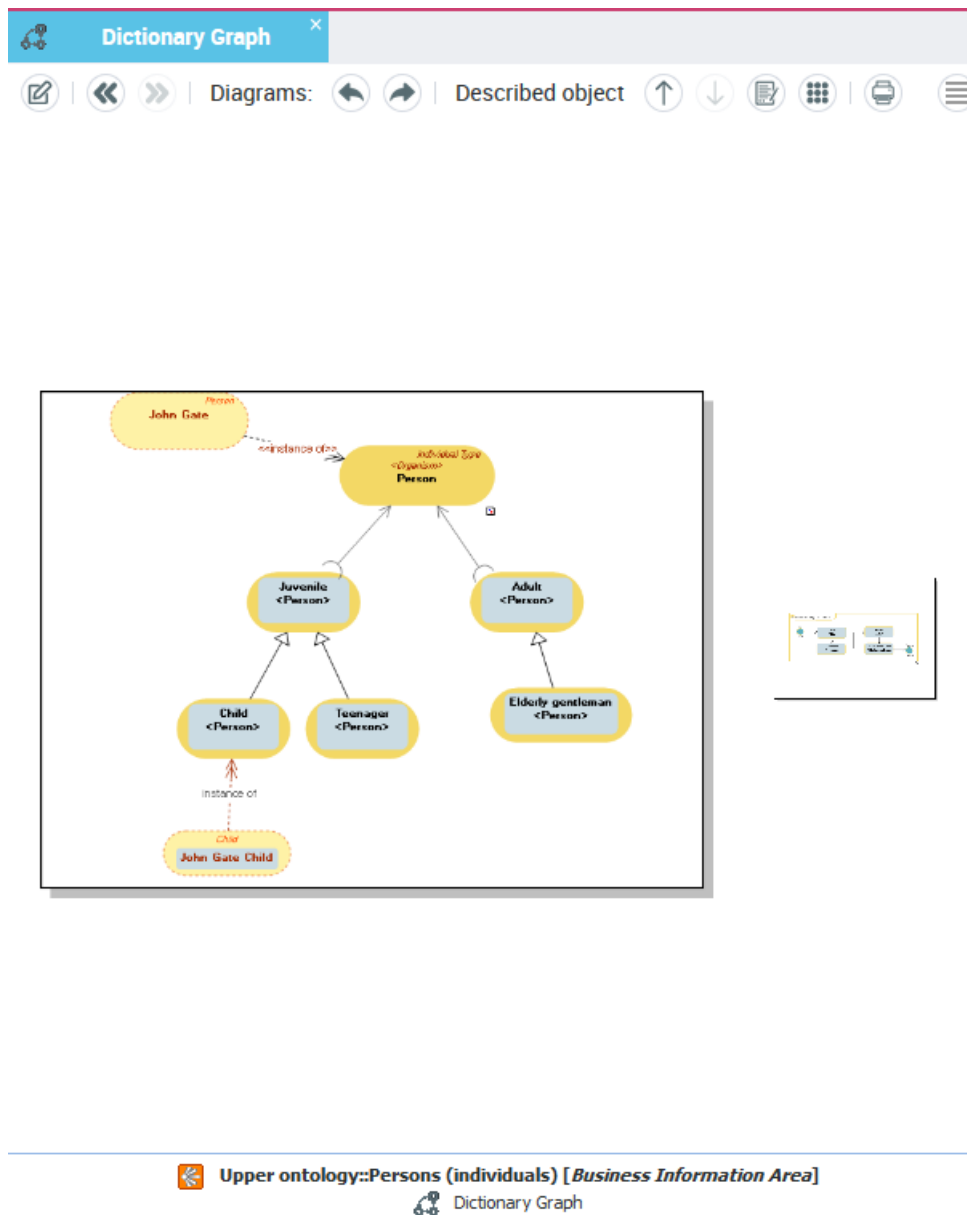
When several diagrams are available for the same object, they are all displayed in the same window.

To navigate between diagrams:

1. Open the diagram.
 See *"Opening a Diagram"*, page 32.

This window provides an overview of all the diagrams describing the object.

2. Navigate between diagrams using the mouse wheel.



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

MANAGING FAVORITES IN HOPEX EXPLORER

In **HOPEX Explorer**, managing favorites is available irrespective of your connection profile type.

See:

- ["Adding Favorites", page 37](#)
- ["Accessing your favorites", page 38](#)

Adding Favorites

You can add an object to your favorites from:

- a list of objects
- (contribution type profile) the object properties pages

 **Once an object is added to your favorites, you cannot remove it from your **Favorites** folder.**

Adding an object to your favorites

Irrespective of your connection profile type, you can add an object to a list of your favorites.

To add an object to your favorites from a list:

1. Connect to **HOPEX Explorer**.
2. Display the list of objects.

Example: In your home page click a tile that displays a list of objects.

3. Select the object that you want to add to your favorites.

 *You can only add a single object to your favorites at a time.*

4. Roll the mouse over the object row.

5. In the **Local Name** cell of the object, click **Plus**  and select **Add to Favorites** .

The selected object is added to your favorites folder.

 *To consult your favorites, see ["Accessing your favorites", page 38](#).*

 **You cannot remove the object from your favorites.**

Adding an object to your favorites (contribution type profile)

With a contribution type profile, you can also add an object to your favorites using the Properties pages.

To add an object to your favorites (contribution type profile):

1. Connect to **HOPEX Explorer** with a contribution type profile.

2. Access the Properties pages of the object.
☛ See ["Accessing Objects", page 27](#).
3. Click **Edit**  to switch to edit mode.
☛ See ["Changing Work Mode", page 22](#).
4. In the properties pages toolbar of the object, click the object icon and select **Add to Favorites**.
The object is added to your favorites.
☛ To consult your favorites, see ["Accessing your favorites", page 38](#).

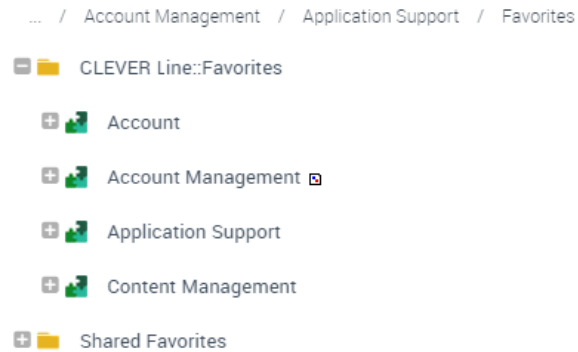
Accessing your favorites

In **HOPEX Explorer**, all the navigation tabs (except the **Home page** and the **Dashboard**) provide direct access to your favorites.

To access your favorites:

1. In your **HOPEX Explorer** desktop, click the drop-down menu of a navigation tab and select **Favorites**.
The favorite page is displayed as an object tree.
2. Expand the **<Your user name>::Favorites** folder.

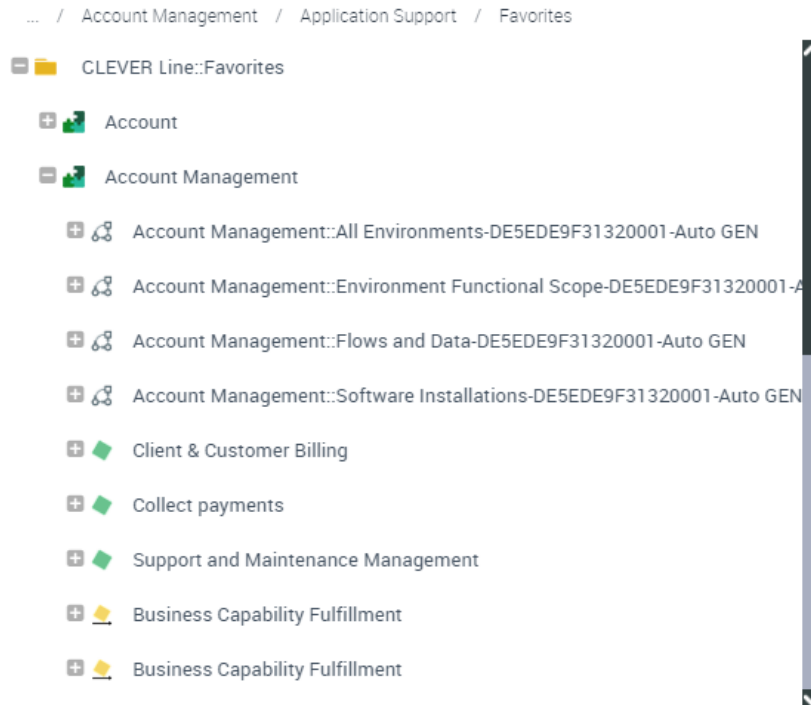
3. Click the favorite you want to view.



The Properties page of the favorite is displayed in the navigation area.

☛ To return to the tree of your favorites, in the breadcrumb click **Favorites**.

☛ To access to objects linked to the favorite, expand the favorite and click the object concerned. The object properties are displayed in the navigation area.



THE GRC CONTRIBUTOR DESKTOP



A specific desktop enables you to contribute to GRC (Governance Risk and Compliance) concerns.

To access the GRC Contributor Desktop:

1. See "[Accessing HOPEX Explorer](#)", page 6.
2. Connect with the "GRC Contributor (Lite)" profile.

➤ For more details on how to use **HOPEX Explorer**, see "[Managing Objects](#)", page 28.

This desktop is available to business users of the following solutions:

- **HOPEX Enterprise Risk Management (ERM)**
- **HOPEX Internal Audit (Audit)**
- **HOPEX Internal Control (IC)**
- **HOPEX LDC (ERM)**

➤ You can access the features and menus of the solution(s) used.

PRESENTATION OF THE GRC CONTRIBUTOR DESKTOP

Accessing the GRC Contributor Desktop

To access the GRC Contributor Desktop:

1. See ["Accessing HOPEX Explorer", page 6.](#)
2. Connect with the "GRC Contributor (Lite)" profile.

This is a profile of "Contribution" type. For more details on the different query profiles, see:

- ["HOPEX Explorer Connection Profiles"](#)
- ["Working in HOPEX Explorer"](#).

GRC contributor rights

The "GRC Contributor (Lite)" profile is a single point of access to GRC issues. It has the same rights as the following profiles available in GRC solutions:

- Action Owner
- Business User (Compliance)
- Business User (IC)
- Business User (ERM)
- Incident Approver
- Recommendation Correspondent
- Recommendation Owner
- Risk Assessor

Features available by solution

Features/Solutions	ERM	IC	LDC	Audit
General - View environment - View and Export Reports - Full text search	X	X	X	X
Risks - Identify risks - Answer assessment questionnaires	X			
Controls - Create controls - Answer assessment questionnaires	X	X		
Control Execution - Completing check-lists		X		

Features/Solutions	ERM	IC	LDC	Audit
Action Plans/Actions - View and edit action plans - Create actions	X	X	X	
Recommendations - View recommendations				X
Incidents - Declare incidents			X	

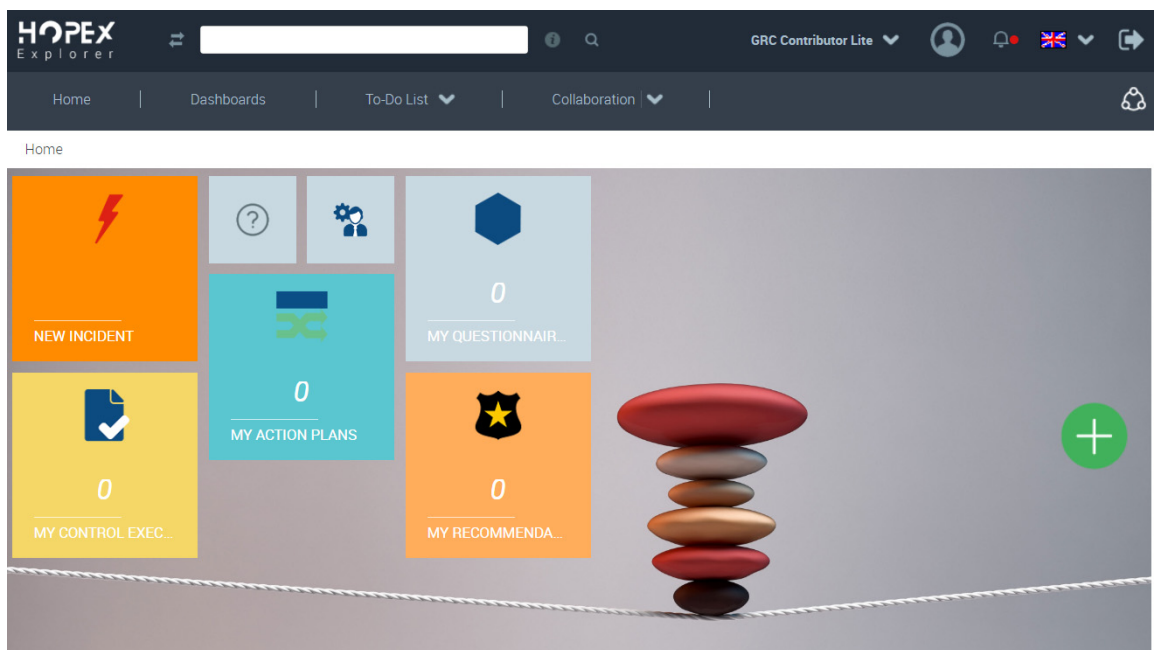
THE GRC CONTRIBUTOR GUI

Home Page

For a general description of an Explorer desktop, see ["Description of the HOPEX Explorer Desktop"](#), page 7.

The home page **HOPEX Explorer** provides tiles that you can use to perform the most common tasks on the objects that you work with.

🖱️ *The tiles and menus displayed depend on the solution(s) used.*



You can, for example, answer questionnaires or enter a progress percentage for your action plans.

Use the navigation tabs to access:

- your **Dashboard**
You can add widgets adapted to various GRC issues.
🖱️ See ["Customizing your Dashboard"](#).
- your **To-Do List**
🖱️ For more details, see ["Liste de tâches"](#), page 3.
- the **Collaboration** functionalities common to all products **HOPEX**.
🖱️ For more details, see ["Accessing a Collaboration Feature"](#).

List of GRC contributor tasks

Use the **To-Do List** navigation tab to access:

- the objects **directly assigned to you** and on which you must perform an action. Workflows may be in progress and you may be required to perform an action.
 For more details and an example, see ["Accessing Your Objects", page 5.](#)
- the **objects within your scope** but which are not directly connected to you.
 For more details and an example, see ["Accessing the objects within your scope", page 5.](#)

Accessing Your Objects

To access your objects:

1. Click **To-Do List** then select one of the following menus:
 - **My Questionnaires**
 See ["Managing Questionnaires", page 14.](#)
 - **My Recommendations**
 See ["Managing Recommendations", page 12.](#)
 - **My Action Plans**
 See ["Managing Action Plans and Actions", page 9.](#)
 - **My Actions**
 See ["Managing Action Plans and Actions", page 9.](#)
 - **My Incidents**
 See ["Managing incidents", page 7.](#)

To access your business processes/organizational processes, org-units and requirements:

1. Click **To-Do List > My Scope** then select the sub-menu of interest to you.

Accessing the objects within your scope

Objects within your scope are objects which depend on objects for which you play a specific role.

The requirements of your scope are, for example, the requirements that concern the department in which you work. You do not necessarily need to perform an action on these requirements. They are basically within your scope for your information.

On the contrary, The "My Requirements" sub-menu displays the requirements that you have created or on which you must specifically take action (because there is an ongoing workflow for example).

To access the objects in your scope:

- 】 Click **To-Do List > My Scope** then one of the tiles corresponding to the objects you want to access:

- **Requirements in my scope**



A requirement is a need or expectation explicitly expressed, imposed as a constraint to be met within the context of a project. This project can be a certification project or an organizational project or an information system project.

- **Controls in my scope**



A control is a set of rules and means enabling the assurance that a legal, regulatory, internal or strategic requirement is respected.

- **Risks in my scope**



A risk is a hazard of greater or lesser probability to which an organization is exposed.

- **Incidents in my scope**



You can also access reports and Report Datasets of objects in your scope.



*You can access your business processes and organizational processes, org-units and requirements (which are directly directed to you) from **To-Do List > My scope**.*

For a detailed description of these objects, see ["Defining the Environment for Solutions", page 641](#).

Accessing your reports

To access your reports:

- 】 Click **To-Do List > My Scope** and select:

- **My reports**
- **My Report Datasets**

MANAGING INCIDENTS

An incident is an event occurrence, internal or external, that has an impact on the organization. It is the basic element for collection of data concerning operational risk.

☛ Incidents are available with **HOPEX LDC**. For more details, see [Collecting Incidents](#).

Use the "GRC Contributor (Lite)" profile to:

- Create an incident, modify it before submission or delete it.
- Analyze incidents (context and losses)
- Approve an incident that has just been declared
- Define and implement action plans.

☛ For more details, see ["Managing Action Plans and Actions", page 9](#).

Creating incidents

To create an incident:

1. See ["Accessing the GRC Contributor Desktop"](#).
2. In the Home page, click **New Incident**.
3. Select the **Declarant's Entity**.
4. Click **Connect** then **OK**.

For more details on incidents, see the documentation for the HOPEX LDC solution. [Collecting Incidents](#).

Accessing your incident dashboard

Two reports are provided for you to view:

- Incidents evolution per month
- Net loss evolution per month

To add these reports to your dashboard:

1. Click **Dashboard**.
2. see ["Adding a widget to your dashboard", page 70](#).

Accessing incidents

To access your incidents:

- 】 From the desktop, click **To-Do List > My incidents**.
The incidents you have created appear.

To access the incidents associated to your objects:

1. From the desktop, click **To-Do List > My Scope** then **Incidents in my scope**.
The incidents associated to the objects you are in charge of appear.

2. In the page that appears, in the drop-down list, you can display:

- your incidents

☛ *The incidents that appear in the **My incidents** list are those that you have created.*

- the incidents to approve

MANAGING ACTION PLANS AND ACTIONS

An action plan comprises a series of actions, its objective being to reduce risks and events that have a negative impact on company activities.

Overview of action plans

Two types of workflows are available for action plans:

- top-down
- bottom-up

The actions that you can perform using the contributor desktop depend on the solution that you are using and the workflow implemented in your enterprise.

Business function	Detailed documentation
Compliance	Managing Action Plans and Actions with HOPEX Compliance
Internal Control	Managing Action Plans for Internal Control

Context for action plan creation

As a contributor, you may have to create an action plan, under different contexts, for example:

- In the "bottom-up" approach, you can create an action plan when you answer a requirement questionnaire.
 You can submit it via the workflow so an approver can validate it.
- An auditor may detect an issue and asks you to create an action plan in order to remediate it.
 In this case you need to connect the issue to the action plan.

Accessing action plans

To access action plans:

1. See ["Accessing the GRC Contributor Desktop"](#).
2. In the home page, click on **My Action Plans**.

 You can also access action plans from the **To-Do List > My Action Plans** menu.

Creating action plans

To create an action plan:

1. See ["Accessing action plans"](#), page 9.

2. In the page that appears, click **Edit**.
You can now access the buttons used to modify the repository.
3. Click **New**.

☛ To return to navigation mode, click **Navigate**.

Connecting an issue to an action plan

To connect an issue to an action plan:

1. See "[Accessing action plans](#)".
2. In the line corresponding to the action plan, click the **Properties** button.



3. In the action plan property page, click **Edit**.
4. Expand the **Scope** section and select the **Issues** tab.
5. Click **Connect**.

☛ You can also create an issue if needed.

Indicating action plan progress

You must indicate the progress statuses for your action plan. To do this, you can create states regularly.

To indicate progress:

1. See "[Accessing action plans](#)", page 9.
2. Click on an action plan to open its properties window.
3. In the properties pages bar, click **Edit** .
4. Expand the **Action Plan Progress** section, and in the **Progress Update** frame, click **New**.
5. Specify a **Progress Update Percentage**.
6. Specify the progress **Evaluation**.
You can specify whether the action plan is:
 - on time, or
 - delayed

Managing actions

Within the context of the internal audit or testing activities, you may, as a manager or action correspondent, be required to:

- specify the actions to take to ensure recommendation follow-up
☛ See "[Implementing recommendations](#)", page 12.
- ensure actions are correctly implemented

To access your actions:

1. See "[Accessing the GRC Contributor Desktop](#)".
2. In your Explorer desktop, click **To-Do List > My actions**.

See also ["Creating an action within the framework of a recommendation"](#), page 12.

MANAGING RECOMMENDATIONS

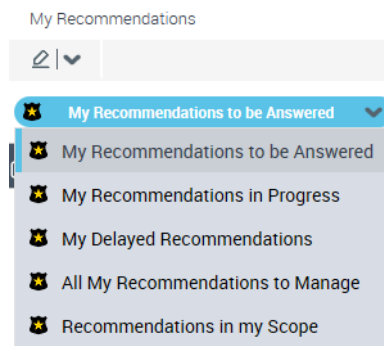
A recommendation describes what must be done to correct a noncompliance detected during an audit.

Accessing recommendations

To access your recommendations:

1. See "[Accessing the GRC Contributor Desktop](#)".
2. In your Explorer desktop home page, click **My Recommendations**.

Recommendations are classified according to their status:



The recommendations to be answered are those for which you must:

- submit an action plan, or
- specify a progress percentage for the action

Implementing recommendations

You may be required to manage recommendations following testing activities or production of the final audit report.

As a recommendation owner, you may:

- create actions whose objective is to implement the recommendations.
- specify a progress percentage for the actions

For more details on recommendations, see "[Implementing Recommendations](#)".

Creating an action within the framework of a recommendation

To create an action:

1. See "[Accessing recommendations](#)", page 12.
2. In the properties of the recommendation, select the **Action Plan** tab.
3. In the **Actions** section, click **New**.
4. Open the properties of the action created.

5. Modify its name if necessary, enter a date limit and an action **Owner**.

☛ The list available in the **Owner** field corresponds to the list of auditees defined on the audit.

Submitting action plans

Actions created and assigned to appropriate users constitute an action plan.

You may submit the action plan to the lead auditor or the audit director via the recommendations workflow.

To do this:

1. See "[Accessing recommendations](#)", page 12.
2. Right-click the recommendation name and select **Action Plan to be Submitted > Submit Action Plan**.

☛ The lead auditor or audit director validates the action plan by return.

MANAGING QUESTIONNAIRES



An assessment questionnaire is a list of questions relating to a particular object and addressed to users.

You may be required to respond to questionnaires concerning:

- controls (within the context of internal control)
- requirements (within the context of compliance management)

Accessing Questionnaires

To access questionnaires:

1. See ["Accessing the GRC Contributor Desktop"](#).
2. In your Explorer desktop home page, click **My Questionnaires**.

In the page that appears, the questionnaires are classified as follows:

- My Questionnaires
- Late questionnaires
- My control execution check-lists

 *Check-lists are questionnaires dedicated to the HOPEX Internal Control solution and used within the context of control execution. See ["Completing Assessment Check-lists"](#), page 15.*

Answering Questionnaires

To complete a questionnaire:

1. See ["Accessing Questionnaires"](#), page 14.
2. Select the questionnaire that interests you and click **Display Questionnaire**.
3. Select the questions in turn and reply to these in the lower part of the window.
4. Click Save.
5. Close the questionnaire display window.
6. Click the questionnaire in the questionnaires list and select **Assessment Questionnaire (To Be Completed) > Submit Answers**.

After viewing the contents of a questionnaire, you can, as a respondent:

- Close the questionnaire without answering.
- Request transfer of the questionnaire to another respondent.
- Delegate all or part of a questionnaire to another person.
- Accept the questionnaire and answer.

From the questionnaire pop-up menu you can:

- Delegate all or part of a questionnaire to a third party (if, for example, you are not the person best qualified to answer certain questions).
 - Make a transfer request.
 - Closing Questionnaires
- Having selected the appropriate check boxes, several choices are available to the respondent:
- Save answers without sending them immediately; this allows you to return complete the questionnaire at a later time.
 - Submit the answers for validation.

 A questionnaire can be opened and closed several times before submission.

Completing Assessment Check-lists

Controls are executed periodically by process managers, to check that operational processes have been executed correctly and that their results comply with expectations.

As a business user, you need to access controls in the form of check-lists.

 Check-lists are specific questionnaires.

To complete the check-lists addressed to you:

1. In your Explorer desktop home page, click **My execution check-lists**.
2. Click **Edit**.
3. Select an element in the list and click **Display Check-Lists**.
4. In the list that appears, select an object to be assessed and answer the check-list questions in the lower frame.
5. Select another object to be assessed and answer the questions.
6. Click the **Save** button.
7. When you have answered all the questions, in the check-list pop-up menu, click **Automatic Assessment Questionnaire (To Be Completed) > Complete**.

 You can modify answers for as long as you do not click **Complete** in the Check-List pop-up menu.

If you receive a questionnaire by mistake, you can ask the session manager to transfer the questionnaire to another person.

To make a transfer request:

1. Click the icon of a questionnaire and select **Assessment Questionnaire (To Be Completed) > Transfer Request**.
The questionnaire switches to the "To Reassign" status.
The manager is informed by e-mail and must reassign the questionnaire to another person.

 For more details on control execution, see [Execute controls](#) in the **HOPEX Internal Control** documentation.

