HOPEX Explorer

User guide

HOPEX V4

MEGA
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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.*

  In the properties pages of a browse type profile, its **Command Line** attribute contains /HV.
    - *See Products accessible on the license (Command Line).*

    `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 and Additional Functionalities Available to Contribution Type Profiles.*

  In the properties pages of a contribution type profile, its **Command Line** contains /HC.
    - *See Products accessible on the license (Command Line).*

    `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.*

   – See *HOPEX Explorer Connection Profiles.*

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.*
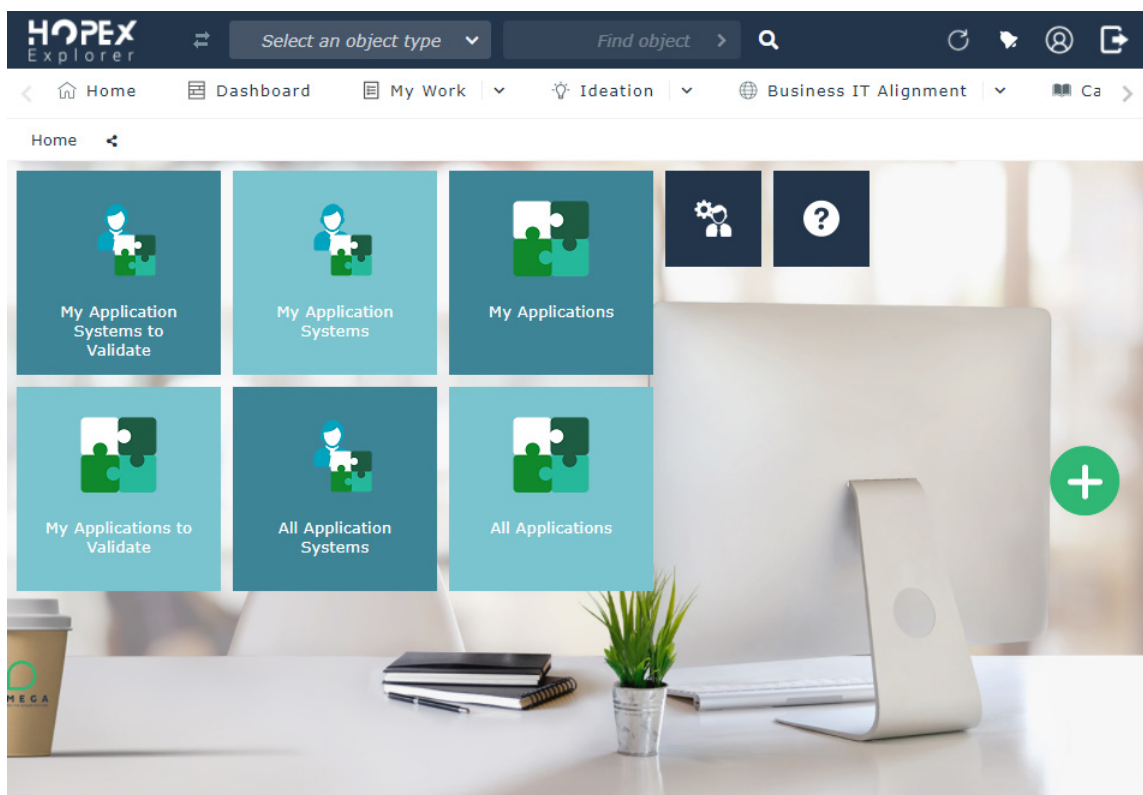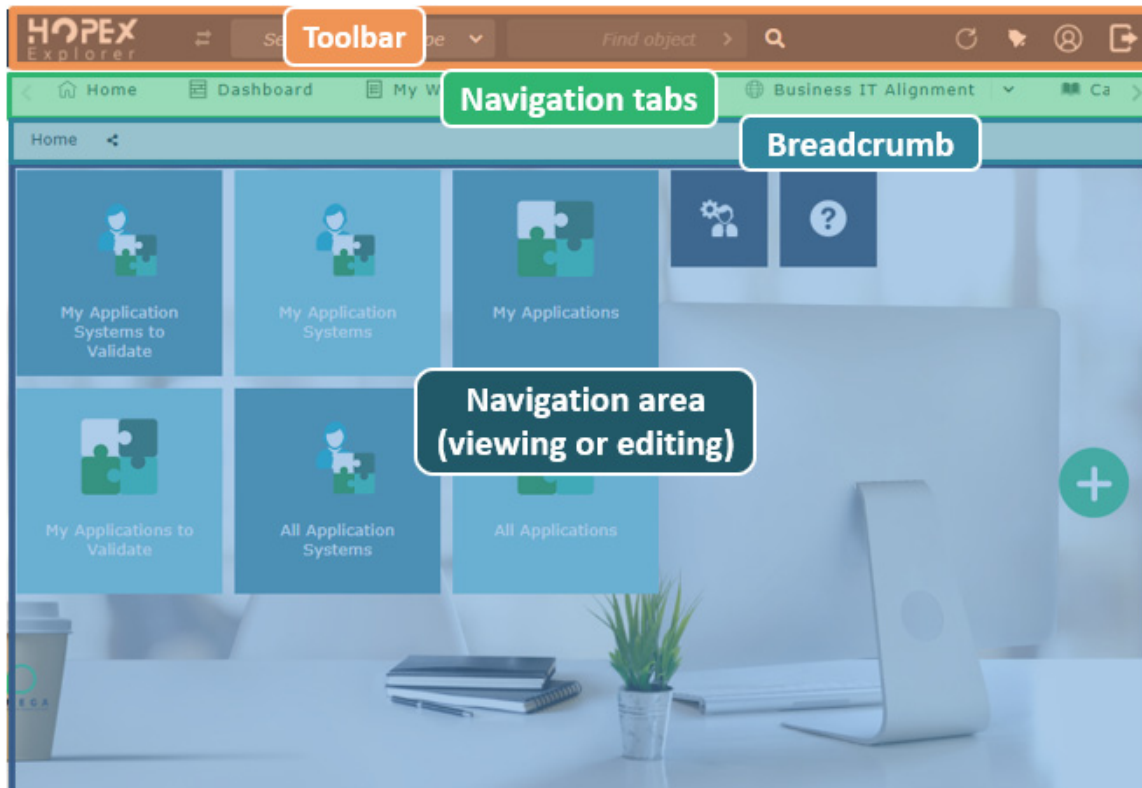

The layout of the **HOPEX Explorer** desktop adapts to its support (PC or tablet).

   – See *Description of the HOPEX Explorer Desktop.*

   – See *Description of the HOPEX Explorer Desktop (tablet).*

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:

The **HOPEX Explorer** (tablet) 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:

- ⇄ [   ] ⓘ 🔍 the quick search bar enables to perform:
  - full-text searches (the repository must be indexed). and
  - searches by object type.
    - *See Searching Objects (Web Front-End).*

- 🔄 **Refresh** enables to immediately update all the open windows in your desktop when you modify the name or value of an object attribute (trees, lists, property pages, diagrams).

- 📩 indicates the number of unread notifications and provides access to notifications.
  - *Managing my notifications.*

- 👤 **Main menu**:
  - displays the name of the **HOPEX** user used for mapping and its connection characteristics (profile, repository, environment).
  - enables to switch to another profile without logging out from **HOPEX**.
    - *See Customizing Your Personal Parameters.*
  - enables modification of data display language.
    - *See Changing the Data Display Language.*
  - gives access to settings: options, alerts, personal parameters reset, license information, **HOPEX** version.
  - gives direct access to **MEGA** Community page.

- ⬛ **Logout** enables disconnection from the **HOPEX Explorer** desktop.

Navigation Tabs

⟨   ⌂ Home   ⊞ Dashboard   ☼ Ideation   ⌄   ❖ Capability Mapping   ⌄   🗎 Process Design   ⌄   ⟩

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

- **Home**, which provides quick access to objects (via tiles), to the Documentation and to options.

- **Dashboard**, which provides access to your widgets.

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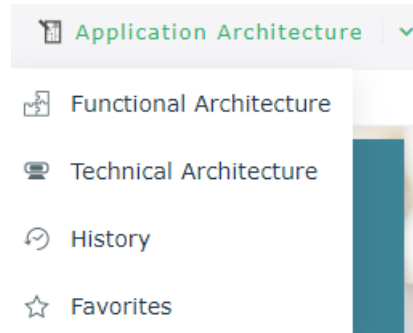
When you click the tab itself, it displays one of these pages.

Example: The **Application Architecture** tab displays the **Functional Architecture** page.

- Each menu is used to display the tiles that give access to the lists and trees of objects available with your connection profile.
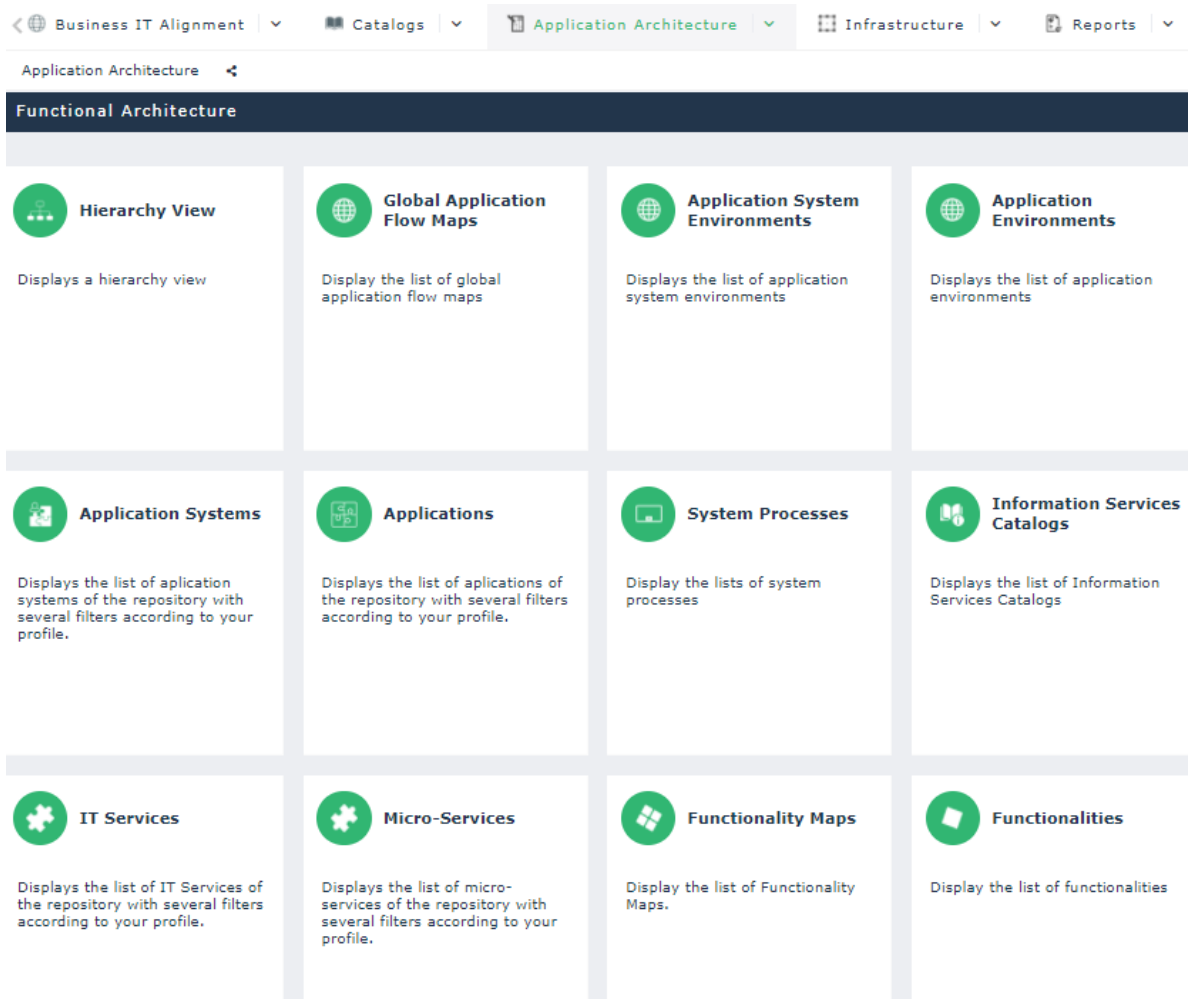
To the far right of the navigation menus, the **Collaboration** 🔗 menu enables to display the collaboration tabs.

- *See Displaying a Collaboration Feature.*

Breadcrumb

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.

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.*

- 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 online documentation.`

    > – *See Home Page.*

- an add tile button .

    > – *To customize your Home page, see Customizing the Home Page of Your Desktop.*

DESCRIPTION OF THE HOPEX EXPLORER DESKTOP (TABLET)

All **HOPEX Explorer** (tablet) desktops appear as follows:
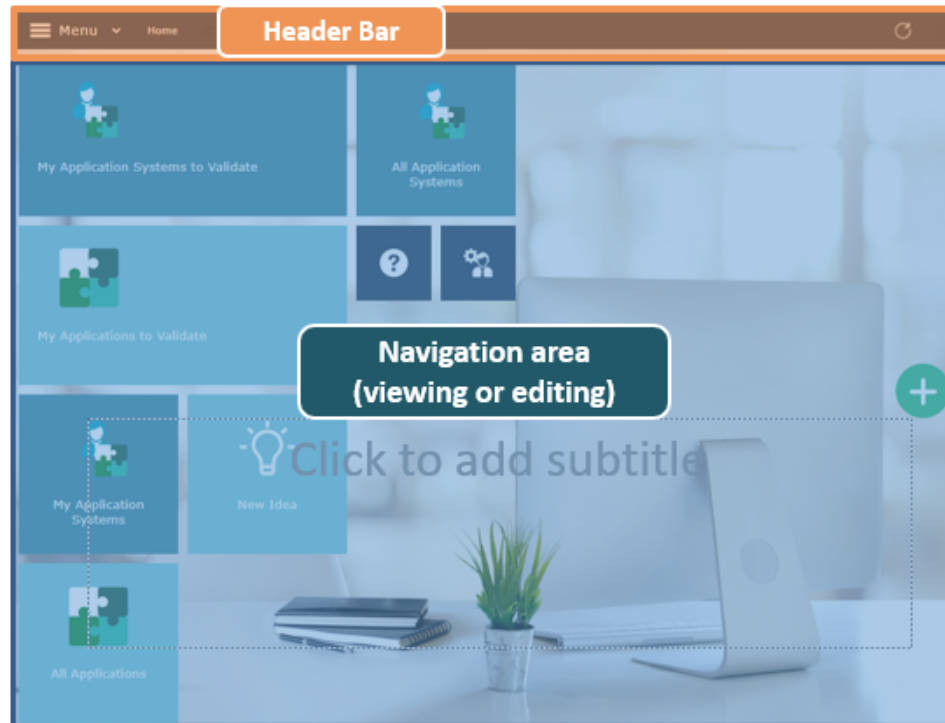
The **HOPEX Explorer** desktop (tablet) contains:
- a ***header bar*** to navigate, to refresh data and to access Collaboration features.
- a ***navigation area*** to view objects.
  By default, you are working in browse mode. If required, and depending on your profile, a button is available to switch to edit mode as necessary.
    - *See Switching Working Mode.*

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.*

- ⟳ a button to refresh data. It enables to immediately update all the open windows in your desktop when you modify the name or value of an object attribute (trees, lists, property pages, diagrams).
- (Landscape mode) a button to access collaboration features.
    - *See Displaying a Collaboration Feature.*

Navigation menu

The navigation menu ☰ gives access to:

- ⓘ Q the full-text search (the repository must be indexed).
    - *See Full-text Search.*
- navigation panes common to all **HOPEX Explorer** (tablet) desktops.
    - *See Navigation panes common to all HOPEX Explorer (tablet) desktops.*
- navigation panes specific to the profile used for connecting to **HOPEX Explorer** (tablet).
    - *See Profile-specific navigation panes.*

Navigation panes common to all HOPEX Explorer (tablet) desktops

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

- **Home**, which provides quick access to objects (via tiles) and to the documentation.
    - *See Home Page.*
    - *See Customizing the Home Page of Your Desktop.*
- **Dashboard**, which provides access to your widgets.
    - *See Customizing Your Dashboard.*
- **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 **HOPEX** version

Name:	CLEVER Line
Profile:	Application Contributor Lite
Repository:	SOHO
Environment:	EnvTestsLab_ _

Language:* 🇬🇧 English

Help

Options

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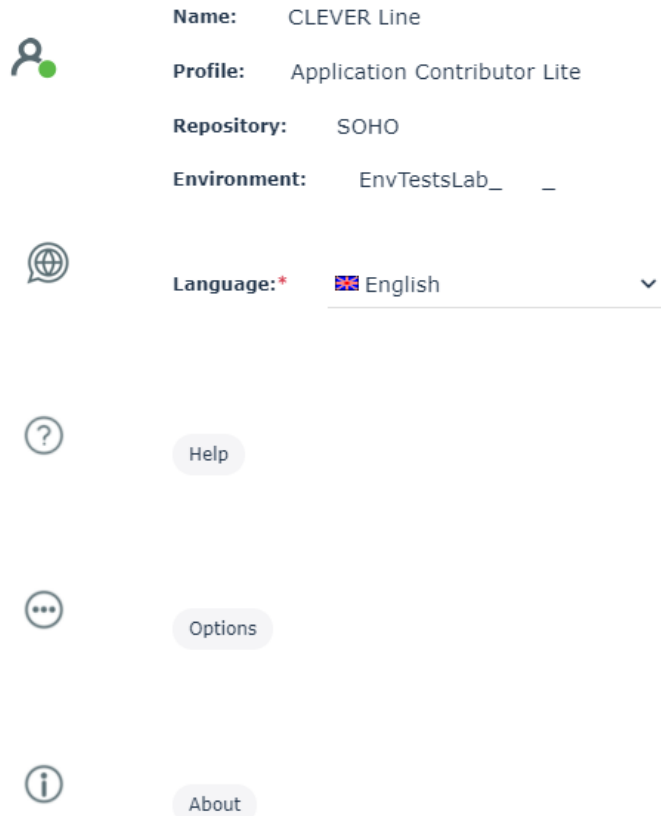
- **Exit**, to leave the **HOPEX Explorer** (tablet) application.

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 Application Architecture navigation pane
displays the Functional architecture tab and shows its
associated tiles.
```
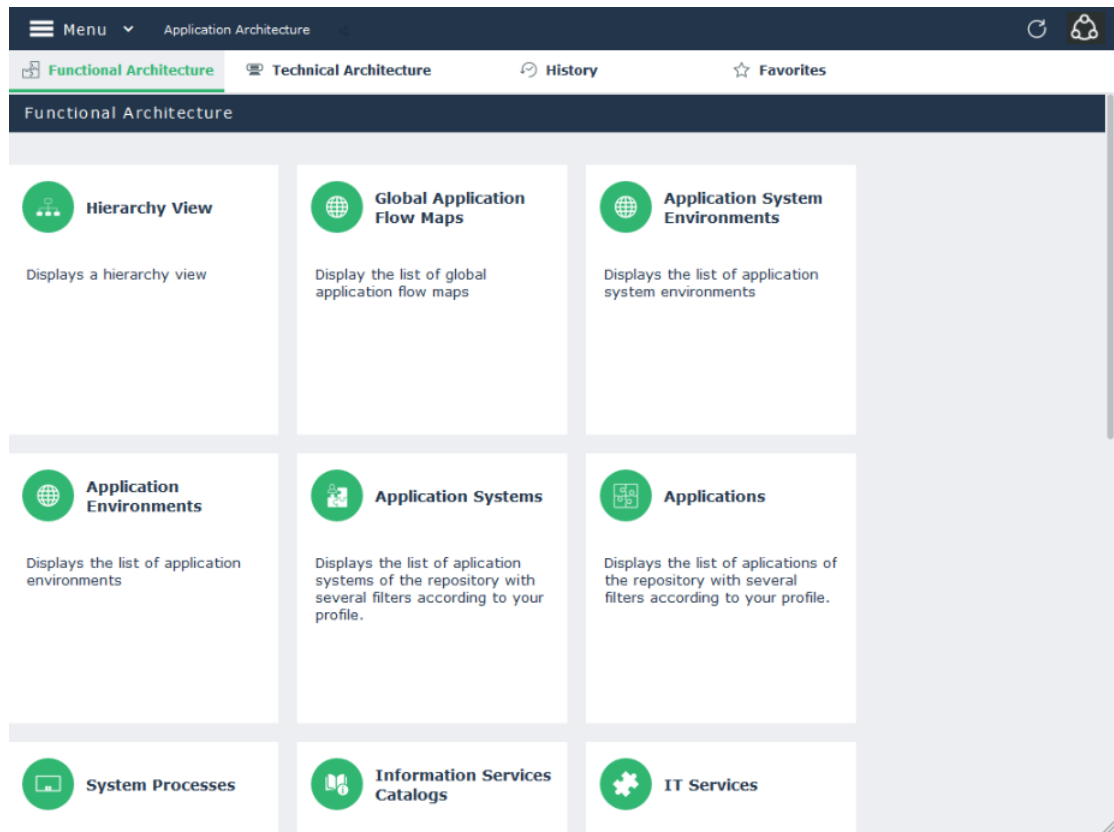

Click another tab to display its tiles.

- See *Navigating in HOPEX Explorer.*

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.*

- 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 Home Page.*

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.
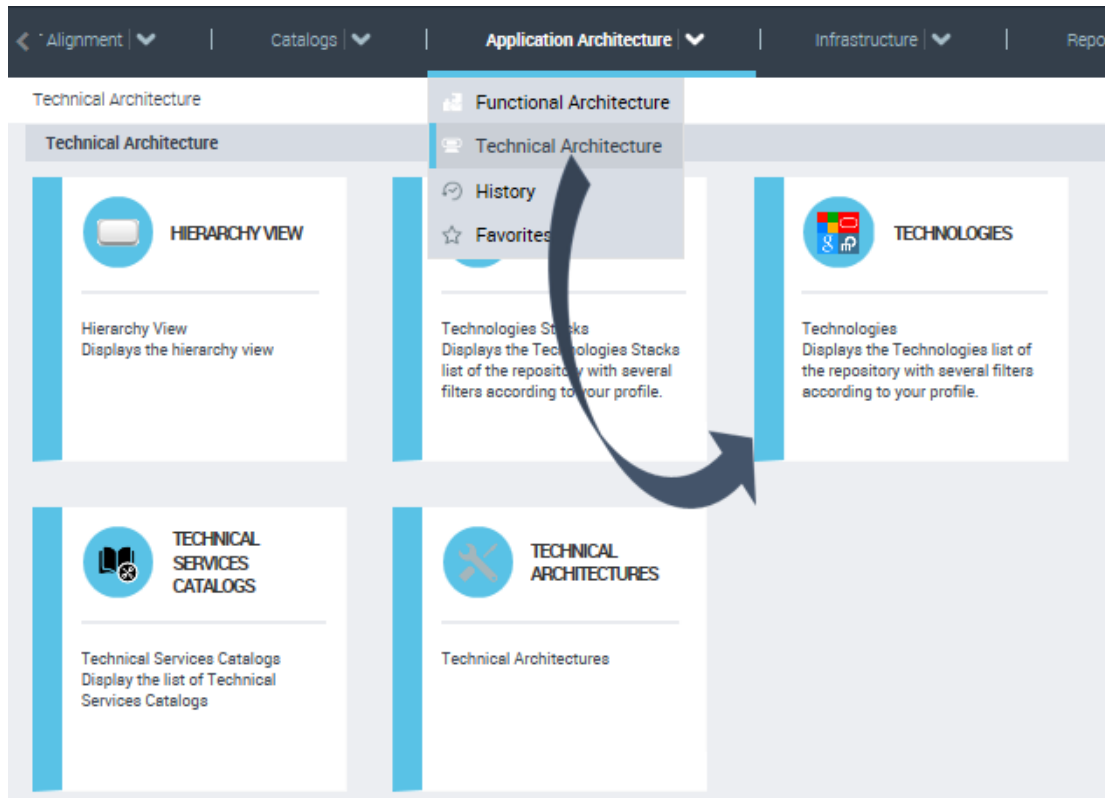
The list of technologies is displayed.

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.

4. Click the **Technologies** tile.
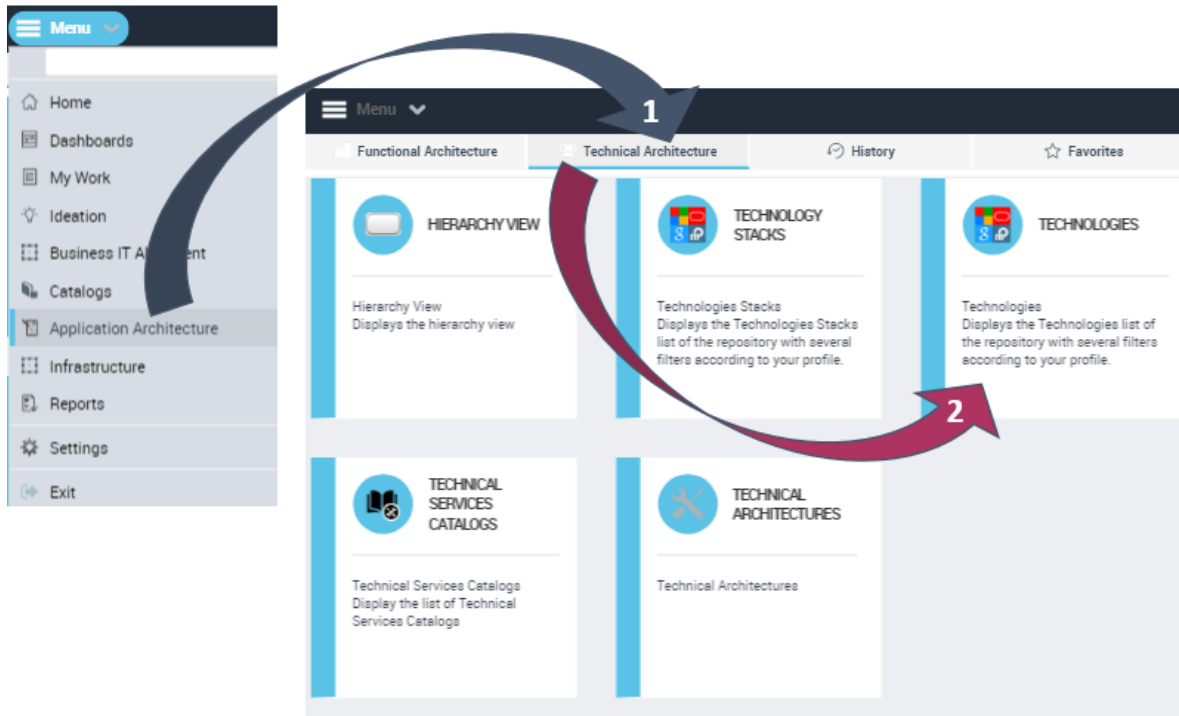
The list of technologies is displayed.

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 Switching Working Mode.

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.*

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.*

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).*

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 *Full-text Search.*
- search by object type.
    - – See *Search by Object Type.*
- your home page customization: adding and removing tiles.
    - – See *Customizing the Home Page of Your Desktop.*
- your dashboard customization: adding and removing widgets.
    - – See *Customizing Your Dashboard.*
- access to options: viewing and modifying
    - – See *Navigation Tabs.*
- favorite management.
    - – See *Managing Favorites.*
- access to reports.
    - – See *In the list of reports of the solution or the list of your reports, select the report in question and click the Properties button associated with the edit window. Accessing Analysis Reports.*
- access to your notifications on objects.
    - – See *Managing my notifications.*
- access to the **Collaboration** window.
    - – See *Displaying a Collaboration Feature.*

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 and Handling a Diagram.*

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 In the list of reports of the solution or the list of your reports, select the report in question and click the Properties button associated with the edit window. Accessing Analysis Reports.*

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.*

    - viewing the reports available on the object (creation not available).

        – *See Specific reports embedded in an object.*

    - accessing the diagrams that contain the object.

        – *See Opening a Diagram.*

- customizing: adding the object to the home page or to favorites.

    – *See Actions on an object from the Local Name of a list.*

- accessing the diagrams describing or containing the object.

    – *See Actions on an object from the Local Name of a list.*

- instant report creation.

    – *See Launching an instant report from a list.*

- 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.*

    - Review Notes

        – *See also Review note specificity.*

    - 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.*
- accessing the Workflow transitions.
  - See *Using Workflows.*
- Excel export.
  - See *Exporting an object List in Excel Format.*

Additional Functionalities Available to Contribution Type Profiles

  - See *HOPEX Explorer Connection Profiles.*

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.*

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.*

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

Switching Working Mode

By default, you are working in browse mode in your **HOPEX Explorer** desktop.
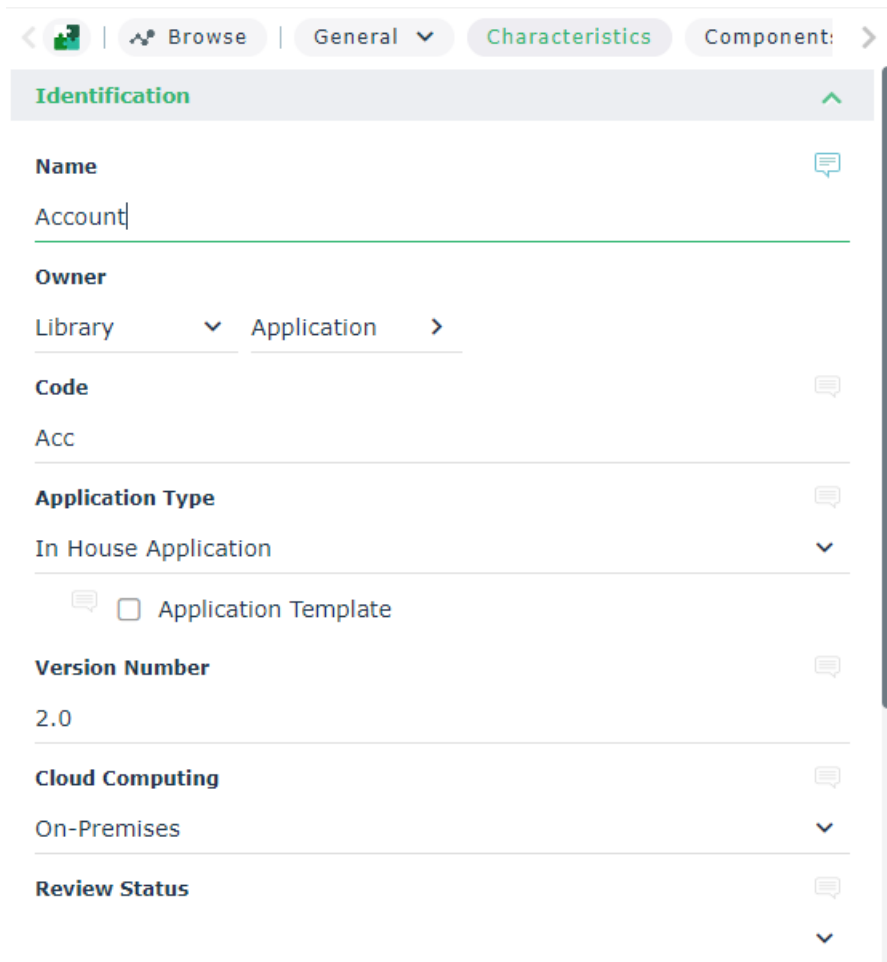
With a contribution type profile, you can modify repository objects. For this, you must work in edit mode.

- See *Additional Functionalities Available to Contribution Type Profiles.*

To switch the working mode (contribution type profile):

1. On your **HOPEX Explorer** desktop, to switch the working 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 and actions like **New** or **Connect** are available.

2. Perform your update.
When you move to another page, you automatically return to **Browse** mode.

    – *To stay on the same page and return to browse mode, click* ***Browse*** .

Switching Desktop without Logging out

In your **HOPEX Explorer** desktop, at any time, you can switch to another profile 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.*

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 desktop associated with the selected profile is displayed.

USING HOPEX EXPLORER

See:

- 6 Managing Objects
- 6 Changing the Data Display Language
- 6 Using Diagrams
- 6 Managing Favorites in HOPEX Explorer

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
- Accessing Object Properties pages
- Modifying Object Properties (Contribution type profile)
- Managing Objects

Accessing Objects

In **HOPEX Explorer**, you can for example access an object from:
- a search result
  - *See Quick Search.*
- a diagram
  - *See Using Diagrams.*
- a property page
  - *See Accessing Object Properties pages.*
- a tree
  - *See for example the tree of your favorites, Accessing your favorites.*
- 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.

   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. Properties vary according to the object.

From the object Properties page, you can:

- consult the object properties
- add review notes
- (Contribution type profile) modify the object properties
  - See *Modifying Object Properties (Contribution type profile)*.
- (Contribution type profile) perform actions on this object
  - See *Managing an object from its property pages (contribution profile type)*.

Review note specificity

In **HOPEX Explorer**, in an object property pages, 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.*

To modify an object properties:

1. Access the Properties pages of the object.

    – See *Accessing Objects.*

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

    – See *Switching Working Mode.*

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.*

    M   *To navigate to another object, use the breadcrumb trail; see Breadcrumb.*

Managing Objects

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

– See *Working in HOPEX Explorer.*

Managing objects from a diagram

To manage an object from a diagram, see Handling a Diagram.

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.
*   **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.*

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

   – *See Switching Working Mode.*

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.*

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 More ⋮ to access hidden actions.*

CHANGING THE DATA DISPLAY LANGUAGE

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

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

1. In the toolbar, click the **Main menu**.
2. Select **<current language> > <new language>**.
   Data is displayed in the selected target language.

   – *Before your* **HOPEX** *objects appear in the required language, they must first be translated in the repository. Non translated objects are displayed with a suffix (<language code>).*

USING DIAGRAMS

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

See:
- Opening a Diagram
- Handling a Diagram

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.*
- the tree of your favorites (click the link alongside the 🔗 icon)
  - *See Accessing your favorites.*
- 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.*
     - *See Handling a Diagram.*

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.*

2. Click **Edit** ✎ to switch to edit mode.
   - See *Switching Working Mode.*

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.

Payroll::Payroll Management System [*Application System*]
Application System Structure Diagram Exploded

4. Click the diagram you want to access.
   The diagram is displayed.
   - See *Navigating between diagrams.*

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 over the object.

Available options are are dark grey.
The selected option is blue.
Non available 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 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 place 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.*

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

2. Navigate between diagrams using the mouse wheel.

MEGA::Mega I::TO - BE::Payment requests processing (Outsourced Data) [*Application System*]
Applicative Architecture Structure Diagram
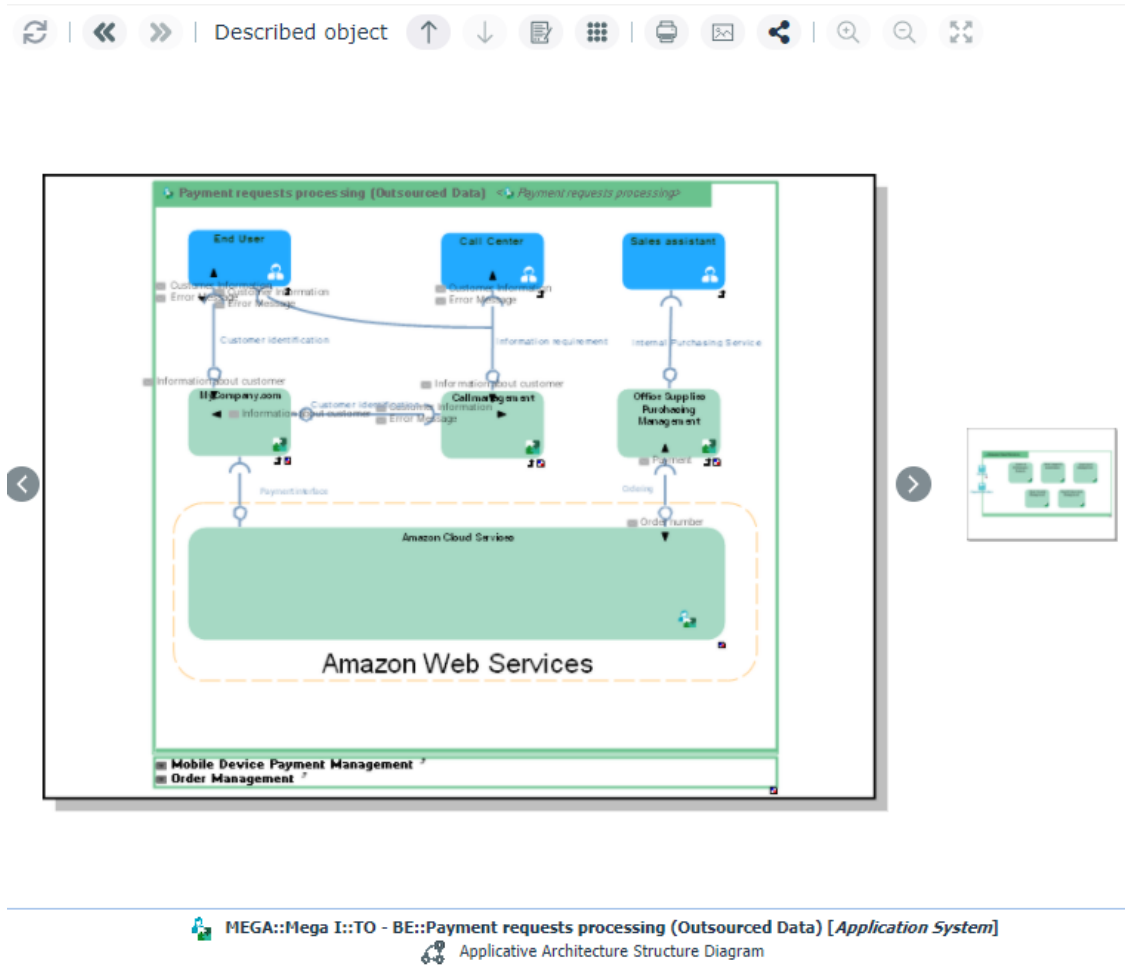
3. Click the diagram you want to display full size.

MANAGING FAVORITES IN HOPEX EXPLORER

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

See:
- Adding Favorites
- Accessing your favorites

Adding Favorites

You can add an object to your favorites from:
- a list of objects
- (contribution type profile) the object properties pages

> Ᵽ **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 mouth 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.*

   > Ᵽ **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.*

3. Click **Edit** ✐ to switch to edit mode.

    – *See Switching Working Mode.*

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.*

Accessing your favorites

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

You can display your favorites in the form of:

*   a tree
    You can manage and classify your favorites in sub-folders.
*   a list
    You benefit from functionalities available for an object in a list (e.g.: diagram creation, property access).

    – *See Common Actions on Repository Objects.*

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 appears.
2. Click **Hierarchy View**, and expand **My Favorites** folder to access your favorites.
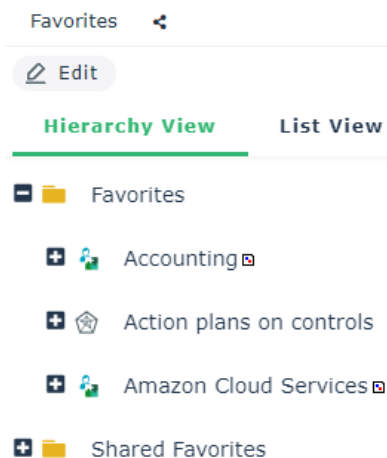
3. Click the favorite you want to view.
The Properties page of the favorite is displayed in the navigation area.

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

4. To access the pop-up menu for an object, click **Edit**, then right-click the object.

5. 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.
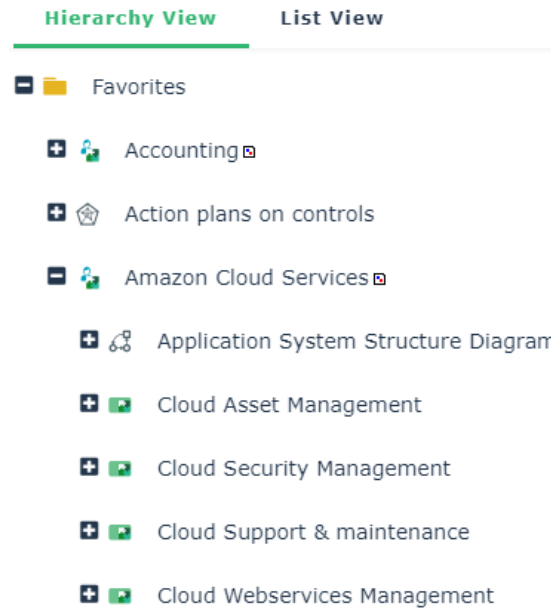
6. To benefit from the functionalities available for an object in a list, click the **List View** tab.
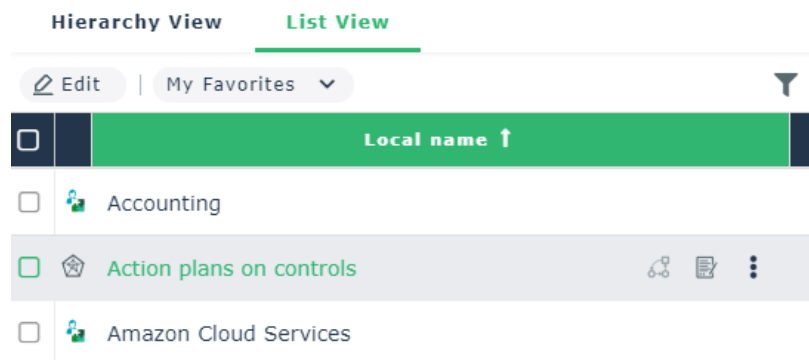
THE IRM CONTRIBUTOR DESKTOP

A specific desktop enables you to contribute to IRM (Integrated Risk Management) concerns.

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

- **HOPEX Enterprise Risk Management (ERM)**
- **HOPEX Internal Audit (Audit)**
- **HOPEX Internal Control (CI)**
- **HOPEX LDC LDC**
  - *You can access the features and menus of the solution(s) used.*

PRESENTATION OF THE IRM CONTRIBUTOR DESKTOP

Accessing the IRM Contributor Desktop

To access the IRM Contributor Desktop:

1. See Accessing HOPEX Explorer.
2. Login with the "IRM Contributor" profile.

   – *For more details on how to use* **HOPEX Explorer***, see* *Managing Objects*.

Object Types by Solutions Used

Find below the object types and features available depending on the solution used.

Features/Solutions	ERM	IC	LDC	Audit
Generalities - Viewing the environment (Viewing your Environment) - Viewing and exporting dashboard reports - Full-text search	X	X	X	X
Risks - Identifying risks - Answering assessment questionnaires (See: Answering a Questionnaire)	X			
Controls - Creating Controls - Answering assessment questionnaires (See: Answering a Questionnaire)	X	X		
Control Execution - Completing Execution Check-Lists (See Completing Assessment Check-lists).		X		
Action Plans /Actions - Viewing and following-up action plans - Creating actions (See Managing Action Plans and Actions).	X	X	X	
Recommendations - Viewing recommendations (See Managing Recommendations).				X
Incidents - Declaring incidents (See Managing Incidents).			X	

Home Page

For a general description of an Explorer desktop, see Description of the HOPEX Explorer Desktop.

The **HOPEX Explorer** home page 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.*
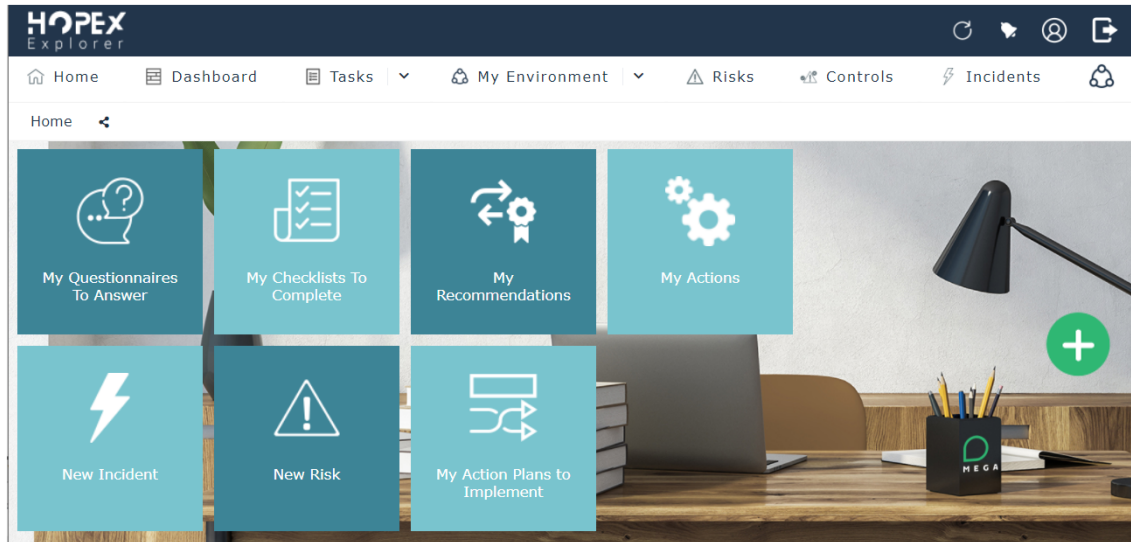
You can, for example, answer questionnaires or enter a progress percentage for your action plans.

Dashboard

You can add widgets adapted to various IRM issues.

See:

- Customizing Your Dashboard
- Dashboard and Widgets

Tasks

From here you can access objects of interest and on which you may have to perform an action.

See:

- Managing Questionnaires and Check-lists
- Executing controls
- Managing Recommendations
- Managing Action Plans and Actions

My Environment

In this section you find the objects which can populate the scope of the objects you work with.

- Business processes
- Organizational processes
- Applications
- Business lines
- Entities
- Requirements: all the requirements constraining the elements for which you are responsible

For more details, see Viewing your Environment.

Risks

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

This menu enables you to access:

- Your risks: the risks you own
- Risks within your scope: risks for which you are an assessor in the context of at least one of the objects of your scope

For more details on the characteristics of risks, see Describing Risks.

Controls

This menu lists all the controls for which you are responsible (for at least one of the entity in your scope).

) *Un contrôle est un moyen de maîtrise d'un ou plusieurs risques permettant de s'assurer qu'une exigence légale, réglementaire, stratégique ou interne à l'entreprise est respectée.*

For more details, see Control Characteristics.

Incidents

This menu lists the incidents:

- you declared
- within your scope: incidents related to at least one object in your scope

) *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.*

For more details, see Managing Incidents.

VIEWING YOUR ENVIRONMENT

To access the objects of your environment:

> › Click **My Environment** then the sub-menu of interest to you.
>
>> – *For a detailed description of these objects, see Managing your IRM Environment.*

Business and organizational processes

) *A business process represents a system that offers products or services to an internal or external client of the company or organization. At the higher levels, a business process represents a structure and a categorization of the business. It can be broken down into other processes. The link with organizational processes will describe the real implementation of the business process in the organization. A business process can also be detailed by a functional view.*

) *An organizational process describes how to implement all or part of the process required to make a product or handle a flow.*

For more details, see Managing Processes.

Applications

) *An application is a set of software tools coherent from a software development viewpoint.*

For more details, see Managing Applications.

Business lines

) *A business line is a skill or grouping of skills of interest for the enterprise. It corresponds for example to major product segments, to distribution channels or to business activities.*

For more details, see Managing Business Lines.

Entities

) *Assessment is a mechanism enabling sending of questionnaires to an identified population to obtain assessments (qualitative or quantitative) on identified objects. The assessment is then supplemented by results analysis tools.*

For more details, see Managing Entities.

Requirements

) *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.*

Requirements constraining objects within your scope appear in columns with the following information:

- **Priority**
- Parent **Regulation framework**

  > ⟩   *A regulation framework is a set of directives, compulsory or not, defined by a government in a law, by standard bodies as "best practices" or as an internal policy in an organization.*

- Number of concerned processes (business or organizational), entities and applications

For more details, see Regulatory Environment.

DASHBOARD AND WIDGETS

Your dashboard enables you to add general or IRM-specific widgets.

To add widgets to your dashboard:
1. Click **Dashboard**.
2. Click the + sign to add a widget to your desktop.
3. Select a widget from the list.
   The widget appears in your desktop.

Widgets for Action Plans

– *Widgets for action plans are made available in all IRM solutions.*

Action Plan Gantt Chart

This chart presents your action plans in the form of a Gantt chart.
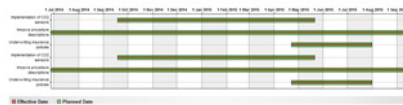
Action plans by progress

This pie chart displays progress breakdown of "in progress" actions you are responsible for.

Action plans by status

This bar chart displays breakdown by status of actions plans you are responsible for.
- To start
- In progress
- Completed
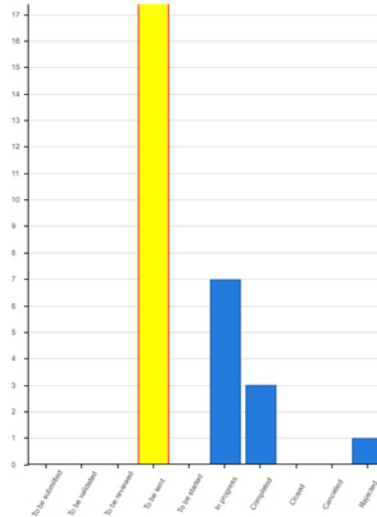
Action plans by progress

This pie chart presents action plan breakdown according to their progress status.
- Delayed
- On Time
- No due date
- To be due within 30 days
- Canceled
- Closed
- Delayed

Action plan dashboard

This pie chart displays "delayed" and "on time" actions you are responsible for.

*** Action plans priority ***

Action plans priority

This pie chart presents action plan breakdown according to their priority.
- Critical
- High
- Medium
- Low
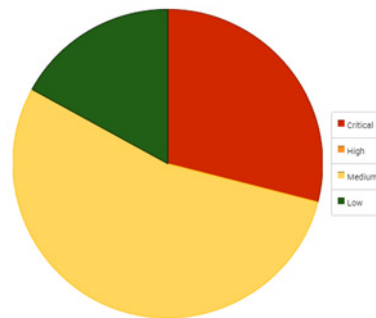
Widgets specific to IRM

Risks by status: this pie chart displays breakdown by status for risks owned by the IRM contributor.

Widgets specific HOPEX Internal Audit

See Viewing recommendation widgets.

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.*

The "IRM Contributor" profile enables you 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.*

Creating incidents

To create an incident:

1. See Accessing the IRM 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 incidents

To access your incidents:

> › From the desktop, click **Incidents > My incidents**.
> The incidents you have created appear.

To access the incidents associated to your objects:

1. From the desktop, click **Incidents** .
2. From the drop-down least that appears, click **Incidents in my scope**.

> – *Incidents withing your scope are objects which depend on objects for which you play a specific role. You do not necessarily need to perform an action on these incidents. They are displayed here for your information only.*

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.

> – *Action plans are used across all IRM solutions, except in **HOPEX Internal Audit** where recommendations and actions are used instead.*

Context for action plan creation

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.

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 IRM Contributor Desktop.
2. In the home page, click **Tasks > Action Plans**.

Creating action plans

To create an action plan:

1. In the home page, click **Tasks > Action Plans**.
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. In the home page, click **Tasks > 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. In the home page, click **Tasks > Action Plans**.
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.*

   • ensure actions are correctly implemented

To access your actions:
1. See Accessing the IRM Contributor Desktop.
2. In your Explorer desktop, click **Tasks > Actions**.

See also Creating an action within the framework of a recommendation.

MANAGING RECOMMENDATIONS

– *Recommendations are used within the framework of **HOPEX Internal Audit**.*

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

Accessing recommendations

To access your recommendations:

› In the home page, click **Tasks > Action Plans**.

Recommendations are classified according to their status:

- Recommendations
- Delayed recommendations

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 recommendations.
- specify a progress percentage for the actions

For more information on recommendations within the framework of **HOPEX Internal Audit**: see Implementing Recommendations.

Creating an action within the framework of a recommendation

To create an action:

1. See Accessing recommendations.
2. In the properties of the recommendation, select the **Action Plan** page.
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 an action plan (consisting of recommendations)

Actions created and assigned to appropriate users constitute an action plan within the framework of **HOPEX Internal Audit**.

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.

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.*

Viewing recommendation widgets

Recommendations and actions by recommendation owner

This table displays recommendations together with the following information in columns:

- recommendation Owner
- due date
- progress rate
- actions representing the recommendation, together with the action owner and due date.

Recommendations by status and year

This bar chart displays recommendations:

- By year
- By status (each color corresponding to a distinct status)
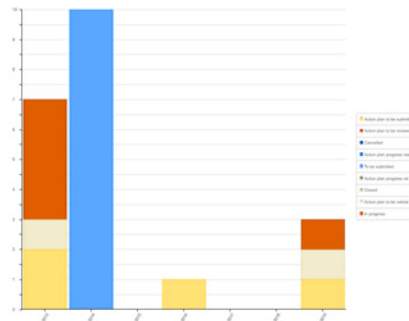
Recommendations by status and audit

This bar chart displays recommendations:

- By audit
- By status (each color corresponding to a distinct status)

Recommendation Dashboard

This dashboard displays action breakdown by progress for all "in progress" recommendations you are responsible for.

- Delayed
- On Time

MANAGING QUESTIONNAIRES AND CHECK-LISTS

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

You may be requested to complete questionnaires about controls within the framework of internal control activities.

⟩ *A check-list is a specific type of questionnaire used in **HOPEX Internal Control** for control execution.*

Accessing Questionnaires

To access questionnaires:

1. See Accessing the IRM Contributor Desktop.
2. In your Explorer desktop home page, click **My Questionnaires**.

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

- Questionnaires
- Late questionnaires

Answering a Questionnaire

To complete a questionnaire:

1. See Accessing Questionnaires.
2. Click the questionnaire you are interested in.
3. Select the questions in turn and reply to these in the lower part of the window.
4. Click **Save**.
5. 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.
- Close 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

- *Check-lists are questionnaires dedicated to the HOPEX Internal Control solution and used within the context of control execution.*

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.

To complete the check-lists addressed to you:

1. In your Explorer desktop home page, click **My check-lists to complete**.
2. Click **Edit** then on an element of the list.
3. In the list that appears, select an object to be assessed and answer the check-list questions in the lower frame.
4. Select another object to be assessed and answer the questions.
5. Click the **Save** button.
6. 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:

- › 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 contextualization see Executing controls.*

CREATING RISKS AND CONTROLS

To create a risk in the IRM Contributor desktop:

› In the Home page, click **New Risk**.

– *For more details on users, see Managing Risks.*

To create a control in the IRM Contributor desktop:

1. In the home page, click **Controls**.
2. Click the **Edit** button then on **New**.

– *For more details, see Managing Controls.*