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ITPM Excel Import Template

How to guide / FAQ

Product Ownership

Q2 2020

1. Objective and User Story

1.1. Objective

The ITPM Excel Import tool provides a mean to bulk load data in the HOPEX IT Portfolio Management solution application without having to develop specific data import tooling or use the API (e.g. GraphQL web API or java/vbscript/javascript server API) or Integration Factory tooling (e.g. Talend plug-in).

The only prerequisite is simple office tools manipulations (e.g. Copy / Paste).

It is primarily designed as a **one-shot import** only tool.

1.2. User Story

As Application Portfolio Manager or ITPM Functional Administrator, I am able to import all the possible ITPM data in the solution using a predefined and ready to use Excel template.

It is easy to copy paste readily available data from excel of office documents into the template without further technical manipulations (e.g. macros)

The Template covers:

- Baseline inventory data : Processes hierarchies, Business Lines, Sites, Capabilities, etc.
- ITPM ‘core’ data : Applications, Technologies, Applications Flows
- ITPM ‘deployment’ data : Software Installations, Deployed Technologies, Server (deployed)
- Governance Data : Portfolio, Assignments

All the required Data to perform a PoC or quick start / bootstrap an IT Portfolio Management initiative is included.

2. How to use the ITPM Excel import template

Check supported version information on the HOPEX Store page.

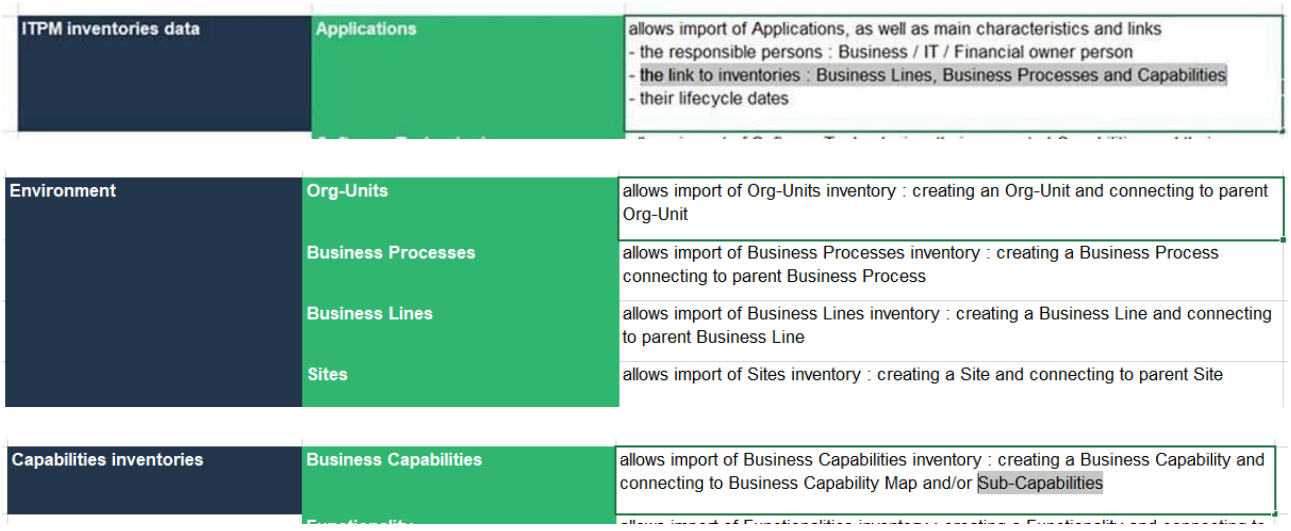
Install the Solution Pack as indicated in the HOPEX Store page and standard documentation.

The first '_README' worksheet contains a first level of self-documentation, detailing the purpose of each worksheet :

This HOPEX template provides means to bulk import ITPM data		
Environment	Org-Units	allows import of Org-Units inventory : creating an Org-Unit and connecting to parent Org-Unit
	Business Processes	allows import of Business Processes inventory : creating a Business Process connecting to parent Business Process
	Business Lines	allows import of Business Lines inventory : creating a Business Line and connecting to parent Business Line
	Sites	allows import of Sites inventory : creating a Site and connecting to parent Site
Capabilities inventories	Business Capabilities	allows import of Business Capabilities inventory : creating a Business Capability and connecting to Business Capability Map and/or Sub-Capabilities
	Functionality	allows import of Functionalities inventory : creating a Functionality and connecting to Functionality Map and/or Sub-Functionalities
	Technical Functionality	allows import of Technical Functionalities inventory : creating a Technical Functionality and connecting to Technical Functionality Map and/or Sub- Technical Functionalities

2.1. How to import inventories hierarchies

To link an application to inventories or to define sub-objects in inventories, it is possible to list *several objects* in a *single* cell.



ITPM inventories data	Applications	allows import of Applications, as well as main characteristics and links - the responsible persons : Business / IT / Financial owner person - the link to inventories : Business Lines, Business Processes and Capabilities - their lifecycle dates

Environment	Org-Units	allows import of Org-Units inventory : creating an Org-Unit and connecting to parent Org-Unit
	Business Processes	allows import of Business Processes inventory : creating a Business Process connecting to parent Business Process
	Business Lines	allows import of Business Lines inventory : creating a Business Line and connecting to parent Business Line
	Sites	allows import of Sites inventory : creating a Site and connecting to parent Site

Capabilities inventories	Business Capabilities	allows import of Business Capabilities inventory : creating a Business Capability and connecting to Business Capability Map and/or Sub-Capabilities

The following sections explain the most typical use cases.

/!\ Technical Functionalities are available in HOPEX IT Portfolio Management starting from HOPEX v3.2 ; in V3, the concept is available in HOPEX IT Architecture V2 (HITA)

2.1.1. How to import a Capability hierarchy

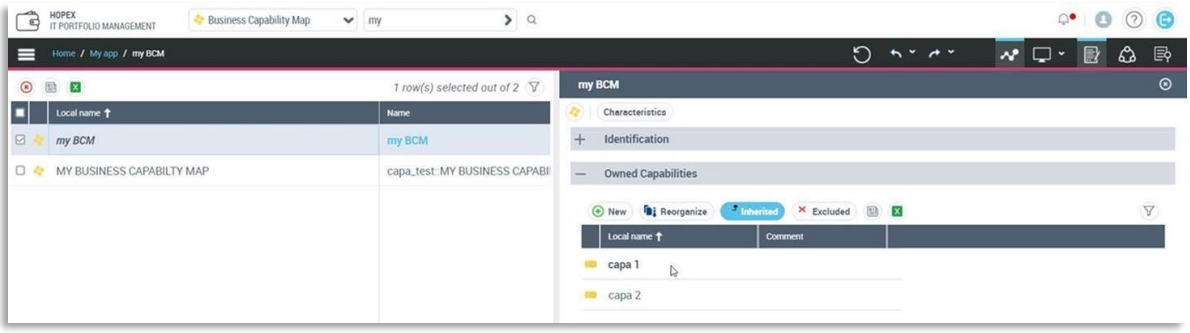
For instance, to define a Business Capability hierarchy :

- Here the capabilities 'capa 1' and 'capa 2' are "level 1" capabilities directly under the 'my BCM' Business Capability Map
- 'capa 1' level 1 capability breakdowns into 'capa 1.2' and 'capa 1.2' "level 2" capabilities

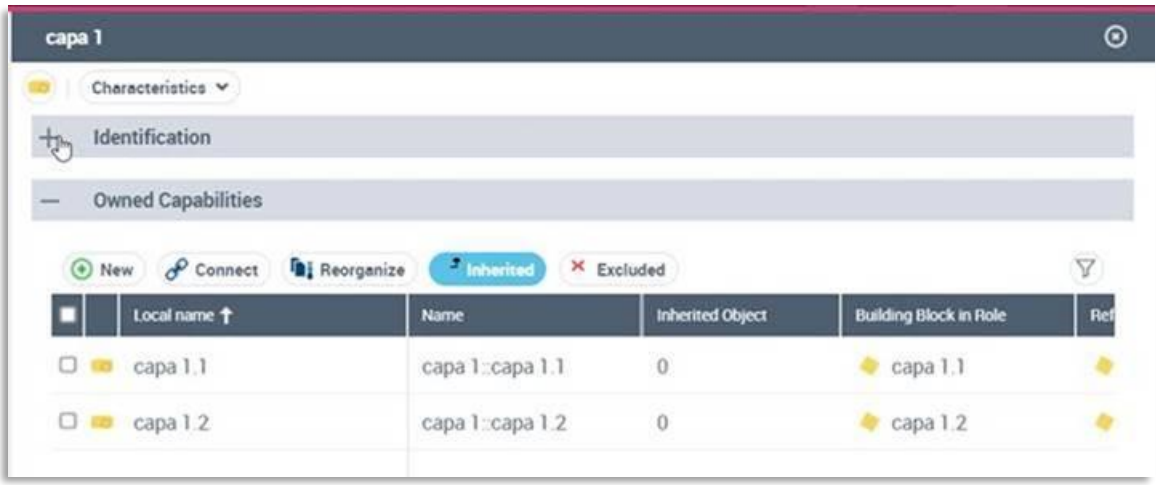
Business Capability	Short Name	Comment	Capability Map	Sub-Capabilities
	capa 1		my BCM	capa 1.1 capa 1.2
	capa 2		my BCM	

The result looks as follows :

- Two capabilities 'capa 1' and 'capa 2' are added to the business capability map "my BCM"



- Two sub-capabilities are defined below the capability 'capa 1'

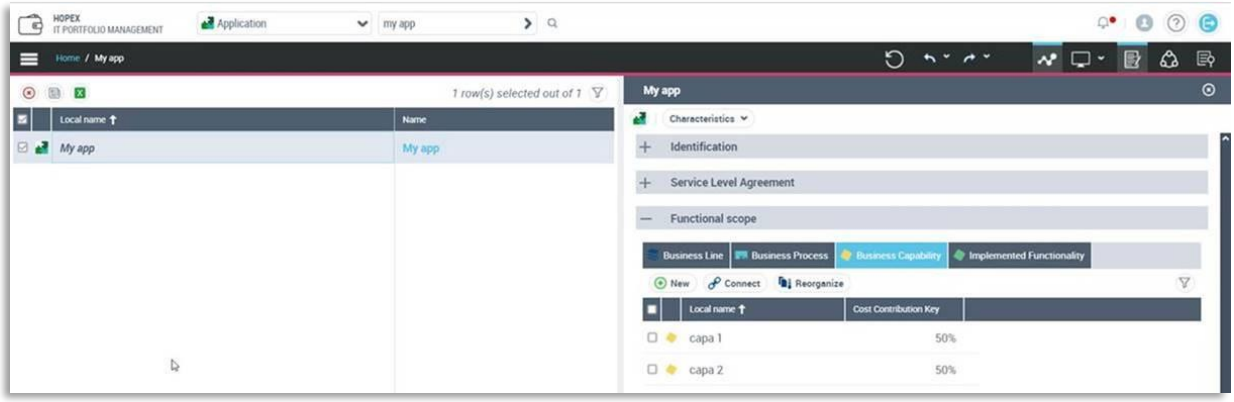


2.1.2. How to link an Application to Capabilities

To link an application to several business capabilities, the capabilities should be listed in a single cell with carriage return:

	A	B	C	N
1	Application	Short Name	Comment	Business Capabilities
3		My app		capa 1 capa 2

Result :



Notes:

- If the Business Capability has not been created beforehand in the Capability worksheet, it will be created from this worksheet; It is already there, it will be reused.
- Repeating the application in several lines with one capability per line also works
- The linked object name must be unique in the repository

  e.g. in the example above, if there is another business capability of 'capa 1' short name in the repository (e.g. in a separate library), an error will be thrown

2.2. How to import additional information types

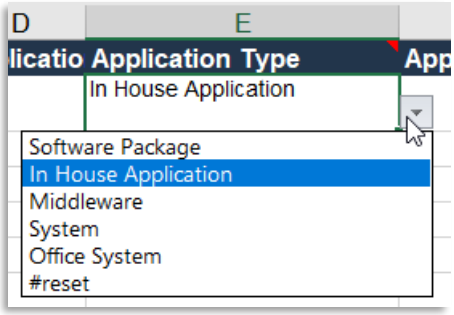
The worksheets of ITPM 'core' or 'deployment' objects contains additional information of various kind, with sometimes a specific behavior.

In most cases, the name of columns matches the name of the corresponding field in the User Interface, so that it is a good idea to check at the solution UI first!

2.2.1. How to set / reset enumerated properties

Several fields have predefined values: they are proposed with a drop-down list in excel.

E.g. 'Application Type' in 'Application' worksheet



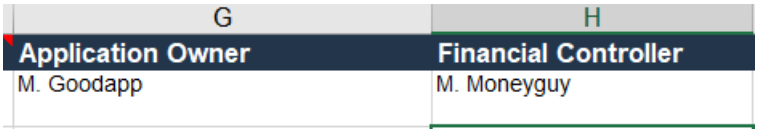
/!\ Note: using '#reset' option will reset the value to null in case of new import of the same file.

2.2.2. How to link persons ?

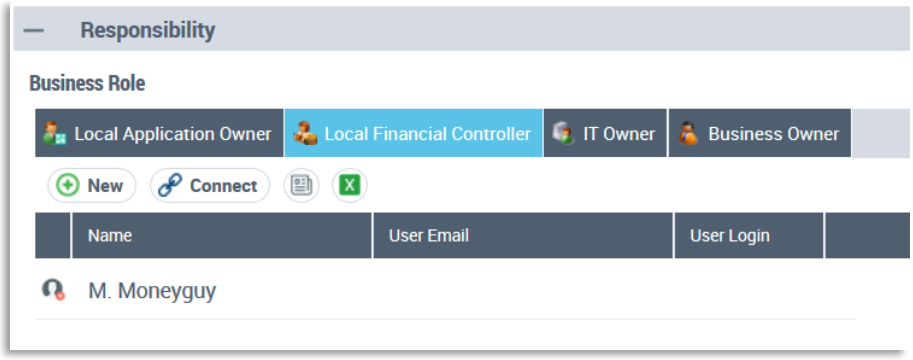
Persons managing / owner of some objects can be defined in the applicable columns

/!\ persons must already exist in the repository, they should be created beforehand and are not created by this import file

E.g. for the 'Application Owner' or 'Financial Controller' columns in 'Application' worksheet



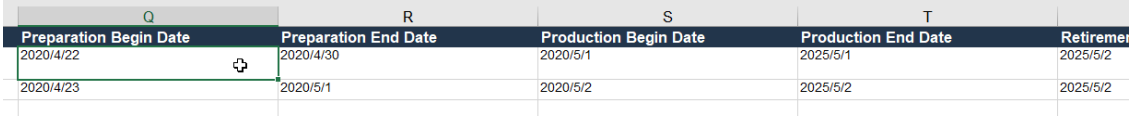
Result :



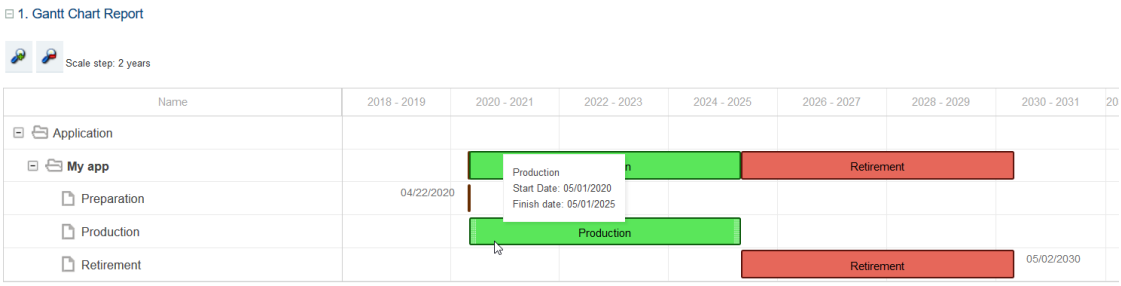
2.2.3. How to set Data format

Several fields correspond to defined dates used to generate the lifecycle objects

- Expected date format is YYYY/MM/DD to avoid confusion among local systems
- The excel template provides its own custom date format for the dates related columns, so data can easily be entered accordingly



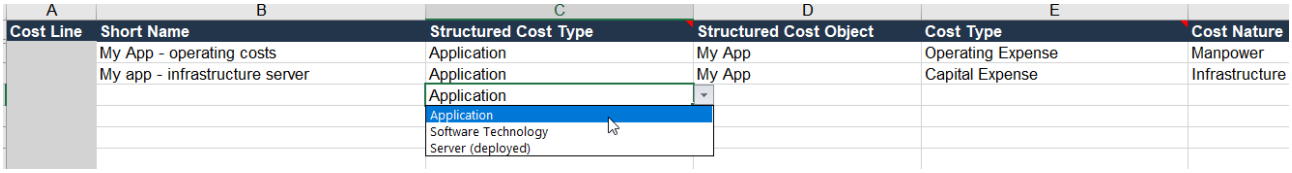
Result :



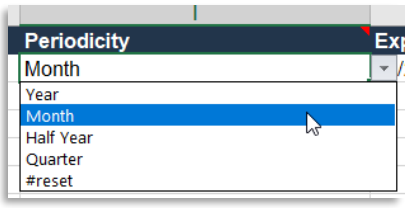
2.2.4. How to define costs ?

The costs worksheet works for all types of objects with costs. It contains cost lines.

- The 'structured cost type' column defines which type of object (Application, Software Technology or Server) is set in the next 'structured cost object' column
    - E.g. adding costs lines for the 'My App' application



- To define a periodic cost line, fill in the following :
    - 'Periodic cost' with recurring cost amount for a period (currency is defined in options, there is a single currency for all costs)
    - 'Periodicity', to define the pending period



    - 'Expense begin date', to define the date from which costs are applied

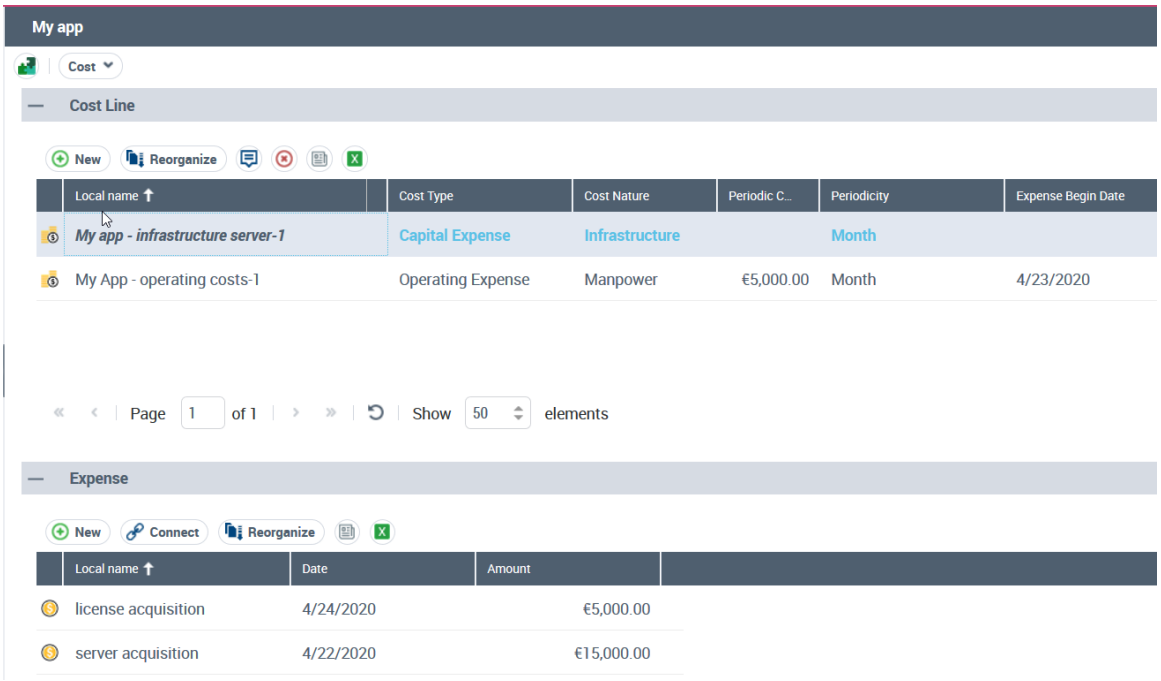
Structured Cost Object	Cost Type	Cost Nature	State	Periodic Cost	Periodicity	Expense Begin Date
My App	Operating Expense	Manpower	Production	5000	Month	2020/4/23
My App	Capital Expense	Infrastructure	Production			

- To define an 'expense' cost line fill in the following columns:
    - 'fixed expenses' : name for the expense
    - 'expense amount' : punctual amount spent
    - 'expense date' : date of the expense

L	M	N
Fixed Expenses	**Expense Amount**	**Expense Date**
server acquisition	15000	2020/04/23
license acquisition	5000	2020/04/25

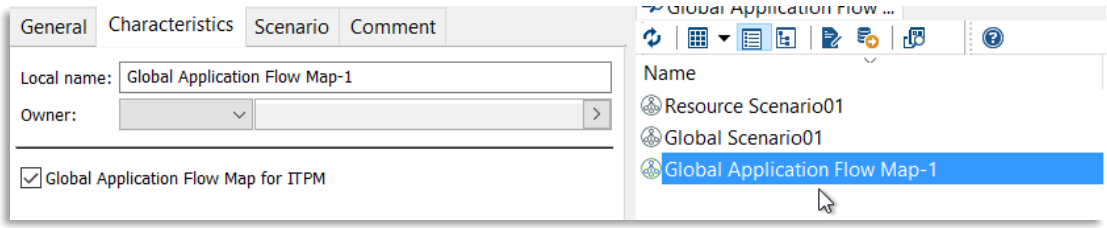
Note: to add multiple expenses for a cost line, use carriage return within cells

Result :



2.2.5. How to import flows

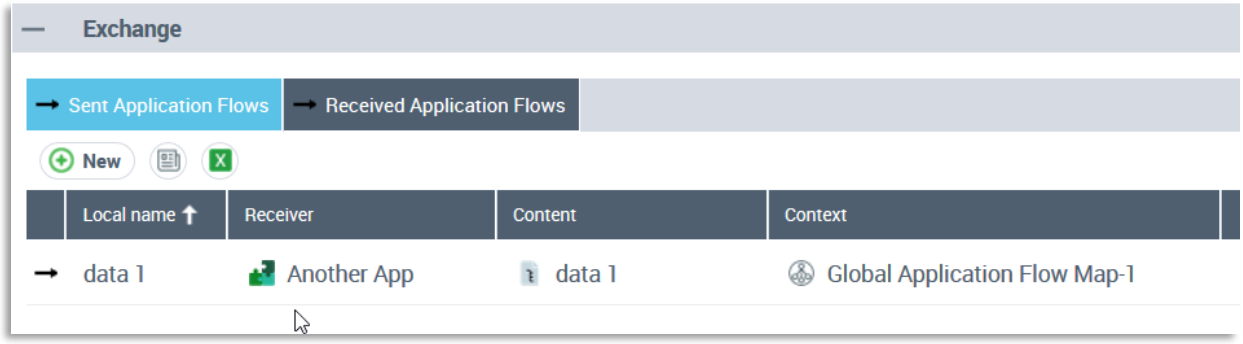
- 'Application Flow' name is optional
- Flows can be imported in a global scenario (in ITPM, this is the default behavior) or in a specific scenario of flows object
  - To use the 'Global Scenario', you need to identify the correct one thanks to the mark 'Global Application Flow Map for ITPM' in the on object properties in HOPEX

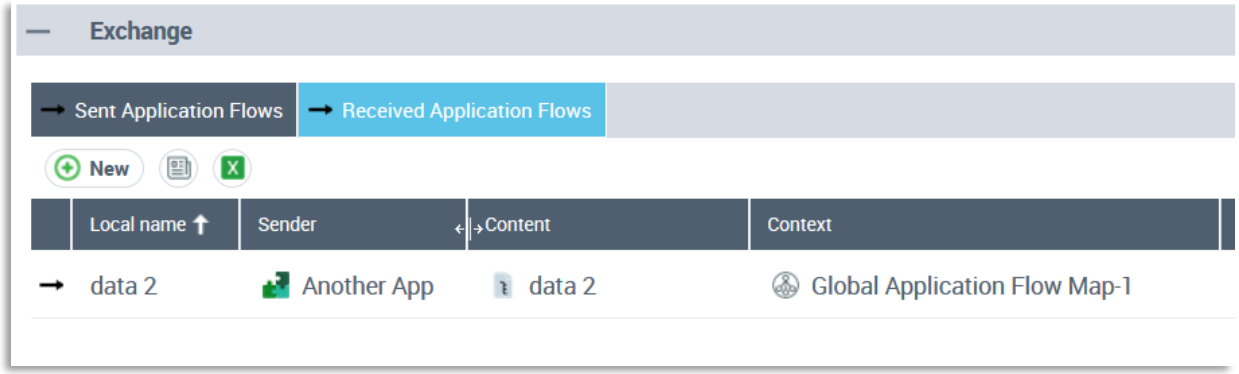


  - To select a specific scenario of flows, define 'scenario of flows' in the 'context type' column and define the holding object (e.g. an application) in the 'resource scenario' column

	A	B	C	D	E	F
	Application Flow	Content	Sender Application	Receiver Application	Context Type	Resource Scenario
		data 1	My App	Another App	Global Scenario	
		data 2	Another App	My App	Global Scenario	
					Scenario Of Flows	
					Global Scenario	

Result :





MEGA International

Headquarters: 9 avenue René Coty - 75014 Paris, France
Phone +33 (0)1 42 75 40 00 - Fax +33 (0)1 42 75 40 95 - www.mega.com