



Menu Filtering by User ID

By Carlos Sebaaly

Editor's Note: So, you have users with similar roles—but maybe not all the same the permissions. While Fine Cut and Menu Filtering are great for assigning roles, what about individual users who may need minor changes? Carlos Sebaaly demonstrates an alternative menu filtering method using the Security Workbench that provides flexibility to assign tasks to both roles and users.

Solution Explorer provides end-users with the means to access JD Edwards® EnterpriseOne® applications easily and rapidly. This is accomplished by setting up tasks and task views and assigning them to users based on their roles. Tasks are the most discrete units in Solution Explorer that provide shortcuts to JD Edwards EnterpriseOne applications and are grouped under task views in a way that can help users find the functions related to the business system they need. With recent releases of JD Edwards EnterpriseOne, new methods were brought in to simplify the refining process of these tasks. Fine Cut is a feature that was introduced to selectively enable or disable tasks by role in a task view. Later, Fine Cut was replaced by a similar feature called Menu Filtering, which has been used starting with release 8.11.

These features, Fine Cut and Menu Filtering, are based on role profiles. That is, any refined menu can be assigned to a role, but not to an individual user profile. This creates a challenge for many administrators while filtering menus, since users with similar roles might sometimes need minor changes to their menus that don't quite justify the effort needed to create new specific roles as it happens frequently with your purchasing module team who all have the same privileges, except one who has an additional right to manage approvals.

In this white paper, I will present an alternative menu filtering method that provides the flexibility of assigning tasks to both roles and users by using Security Workbench. The intended audience of this article is those responsible for creating and assigning menus to users on versions of JD Edwards EnterpriseOne - 8.9 and above.

Each task and task view is assigned two unique identifiers: the Task ID (TMTASKID), which is a collection of letters and numbers called GUID, and the Short Task ID (TMTASKNM), which is used in the Fast Path. These tasks are stored in table F9000, which can be found under Control Tables of a given environment.

Why am I starting with these details? Because you will be using it along with Security Workbench (P00950) for setting the required filtering to any of JD Edwards EnterpriseOne menus. Therefore, to accomplish this, you need to set Row Security for a specified Task ID or Short Task ID in order to hide its corresponding task or task view from the menu.

Next I'll go through the process of hiding tasks and task views using Security Workbench (P00950); this consists of three major steps:

1. Enable Row Security for a TaskID data item.
2. Determine the Task ID for a task or task view.
3. Use Security Workbench to secure the TaskID.

Enable Row Security for TaskID Data Item

Before you can set up row security, you must activate row security in Data Dictionary Design for Data Item TaskID. If row security is not enabled for this data dictionary, you will not be able to



Menu Filtering by User ID

proceed with Step 3 (Use Security Workbench to Secure Tasks) and you'll receive this error in Security Workbench: "Data Item not setup for row security" (See Figure 1).

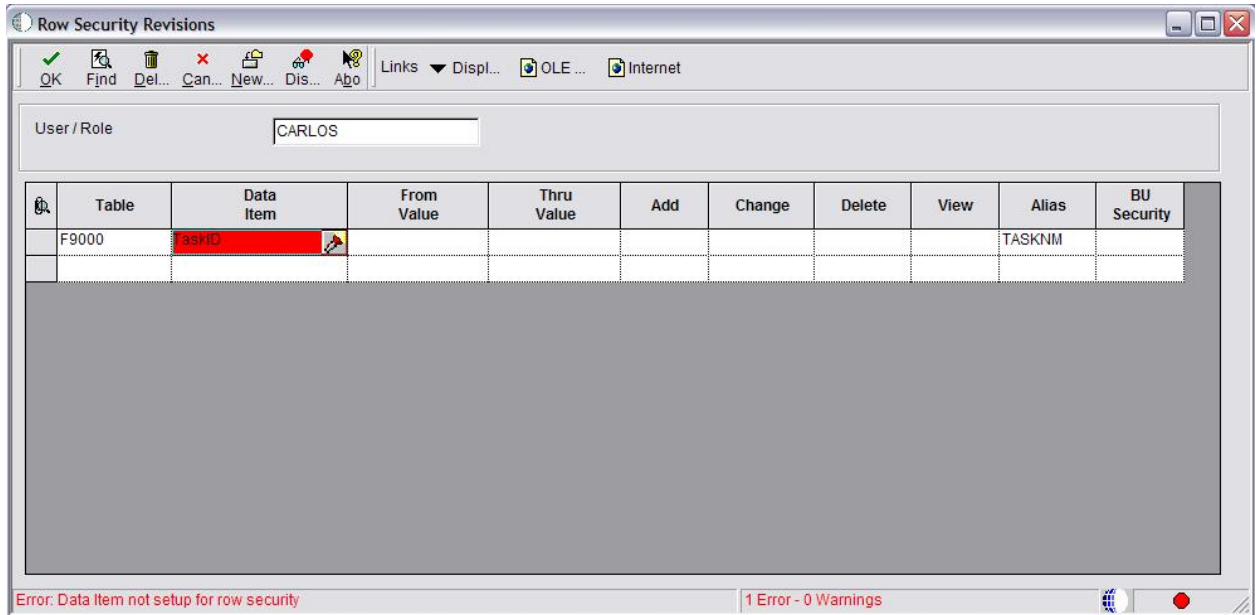


Figure 1: Data Item Error in Security Workbench

This Article Continues...

Subscribers, log in from our main search page to access the full article:

www.JDEtips.com/MyAccess.html

Not a Subscriber? Gain access to our full library of JDE topics:

www.JDEtips.com/JD-Edwards-Library

Visit www.JDEtips.com for information on the JDEtips University schedule, private training and consulting, and our Knowledge Express Document Library.

License Information: The use of JDE is granted to JDEtips, Inc. by permission from J.D. Edwards World Source Company. The information on this website and in our publications is the copyrighted work of JDEtips, Inc. and is owned by JDEtips, Inc.

NO WARRANTY: This documentation is delivered as is, and JDEtips, Inc. makes no warranty as to its accuracy or use. Any use of this documentation is at the risk of the user. Although we make every good faith effort to ensure accuracy, this document may include technical or other inaccuracies or typographical errors. JDEtips, Inc. reserves the right to make changes without prior notice.

Oracle and J.D. Edwards EnterpriseOne and World are trademarks or registered trademarks of Oracle Corporation. All other trademarks and product names are the property of their respective owners.

Copyright © by JDEtips, Inc.