



JD Edwards EnterpriseOne Best Practices for Menus

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Scope

This White Paper “Best Practices for Menus” will address the commonly held misconceptions around the usage of Task Views, the Task View structure and Menu Filtering in JD Edwards EnterpriseOne. We will also outline our best practices as well as the underlying reasons for our recommendations.

Executive Summary

Minimizing Effort, Maximizing Productivity

In order to simplify and streamline menu maintenance (and security maintenance which is related) and to maximize efficiency within your enterprise, it is important to implement some best practices around the usage of menu Task Views, menu travel, and Menu Filtering.

By utilizing a single menu (Task View) for all end users and by making use of best practices for menu travelling (the number of clicks used before launching a process) and by taking advantage of Menu Filtering (the actual view the user has of the menu), you can significantly reduce the amount of time needed to create and maintain your menus. You will also enhance the user experience when working with JD Edwards - thus improving user productivity and efficiency when using the system.

Introduction to Task Views

Task Views were introduced to JD Edwards with the advent of the Solution Explorer interface as an alternative to the old Menu/Custom Menu interface. Task views are delivered covering various system specific areas such as system administration (Life Cycle Tools), development (Content Development Tools), and end user tasks (EnterpriseOne Menus).

Task Views are the standard interface that users must use to navigate access to the programs and reports they need to perform their day to day jobs on all versions of JD Edwards EnterpriseOne (including 9.1). EnterpriseOne is delivered with a very comprehensive Task View (typically called EnterpriseOne Menus) that includes all of the available modules and programs organized into basic business processes. However, from the user's perspective there is a big drawback – the Task View is so huge that it is difficult to navigate.

In addition of course, since sites typically need to add their own custom software and versions to their users' menus (and since multiple Task Views are allowed), many sites choose to create additional custom Task Views.

Duplicate Tasks

Whether or not multiple Task Views are used, many sites manage the Task View in much the same way as menus were managed. In other words, entire folder/program structures are duplicated in multiple locations throughout the Task View (or indeed across multiple Task Views if they exist).

In doing this, sites are typically managing task views without benefiting from the tremendous power and advantages of the Solution Explorer interface and Menu Filtering. Through these tools, JD Edwards has provided the ability to present a single interface for all users while at the same time creating the ability to fully customize this interface and present only what is needed by each user to that user individually. There is typically no need for the same program/version combination to be accessible from multiple places in the Task View.

Where a company has created a new custom Task View to only include the modules and programs actually used by their company, many of the issues inherent in the original JD Edwards Task View have unfortunately still been propagated to the new Task View(s).

A perfect example of where unnecessary complexity has been created is with the Address Book and Customer Master functions. Many roles within EnterpriseOne need at least inquiry access to these functions. The result is that sites with multiple Task Views have tasks duplicated across Task Views, and sites using a single view will have the same function (or what appears to be the same function) in multiple places within the task view.

Commonly Encountered Issues

Maintenance Overhead

Where the same function has been made available from multiple places this leads to a maintenance and administration overhead. Indeed, some companies have increased their workload exponentially because they have been unable to find the time needed to simplify their Task Views.

While system administrators are too busy maintaining the Task Views, they aren't helping their users or fine tuning overall system performance. Meanwhile, the Task View has grown beyond the original JD Edwards delivered Task View!

User Frustration affecting Productivity

Complication creates a second issue because users need to take time to find what they need (and get frustrated when they need to make calls to IT asking where their functions are).

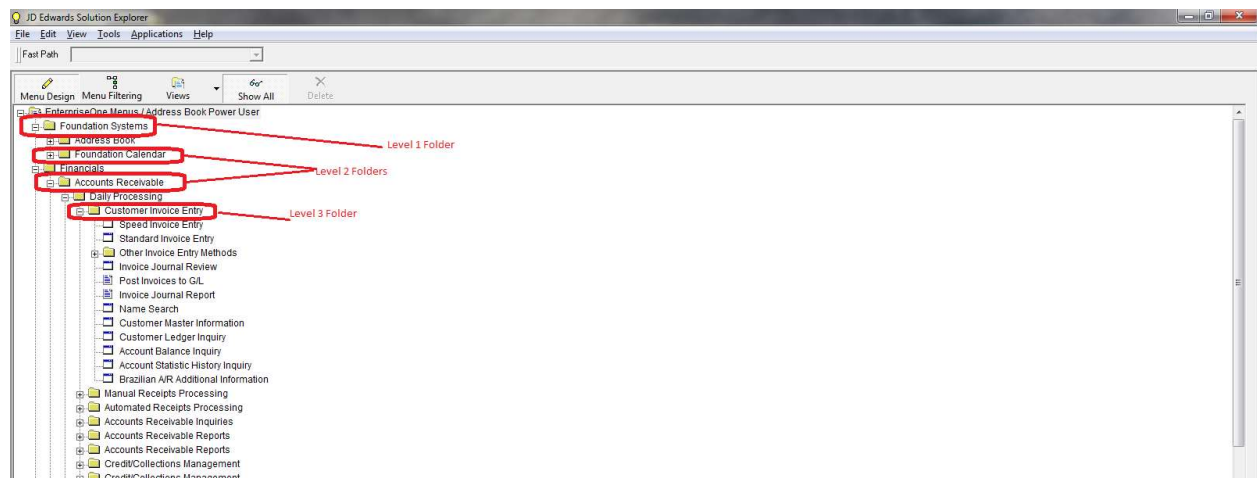
If every time a user needs to run a different process they need to take a minute more to launch it, and they need to run a new process every hour, that is an extra 5-10 minutes every day (per user) that the business (and the users) are losing in wasted time.

Data Integrity Errors

The result of confusion for the user is the risk that users run the wrong version of a process. Very often, the solution applied to prevent such confusion from reoccurring is to create better (in other words more lines of) security. However, while security is necessary and needs to be implemented effectively, it is also true that a simpler menu structure will drastically lessen the risks of unnecessary errors due to new or distracted users running an incorrect version of a process.

Solutions

Let's define some basic terminology to avoid confusion. A level 1 folder is a folder that is accessible directly from the Task View. A level 2 folder is a folder that is accessible from a level 1 folder and so on.



A Single Task View – Minimizing Duplication

In order to simplify how your users access the programs they need, as well as reducing the system maintenance required, it is recommended that a single Task View be utilized.

A single Task view is an advantage because while it is technically possible to apply security to force users to see just a specific Task View, it is not very easy to achieve or to maintain such security. (For advice on implementing this security contact hazel.jackson@ALLOutSecurity.com).

This single Task View should contain all of the programs and reports for all divisions and areas of a company. It should be organized by functional area, and in such a way that there is no duplication of tasks within functional areas.

In other words, it is not necessary to duplicate Address Book inquiry within Accounts Payable as well as in General Ledger, and even Purchasing. Programs and reports that will be utilized across multiple functional areas should be organized into their own folder structure and placed in a level 1 folder structure that will be easily accessible to all users.

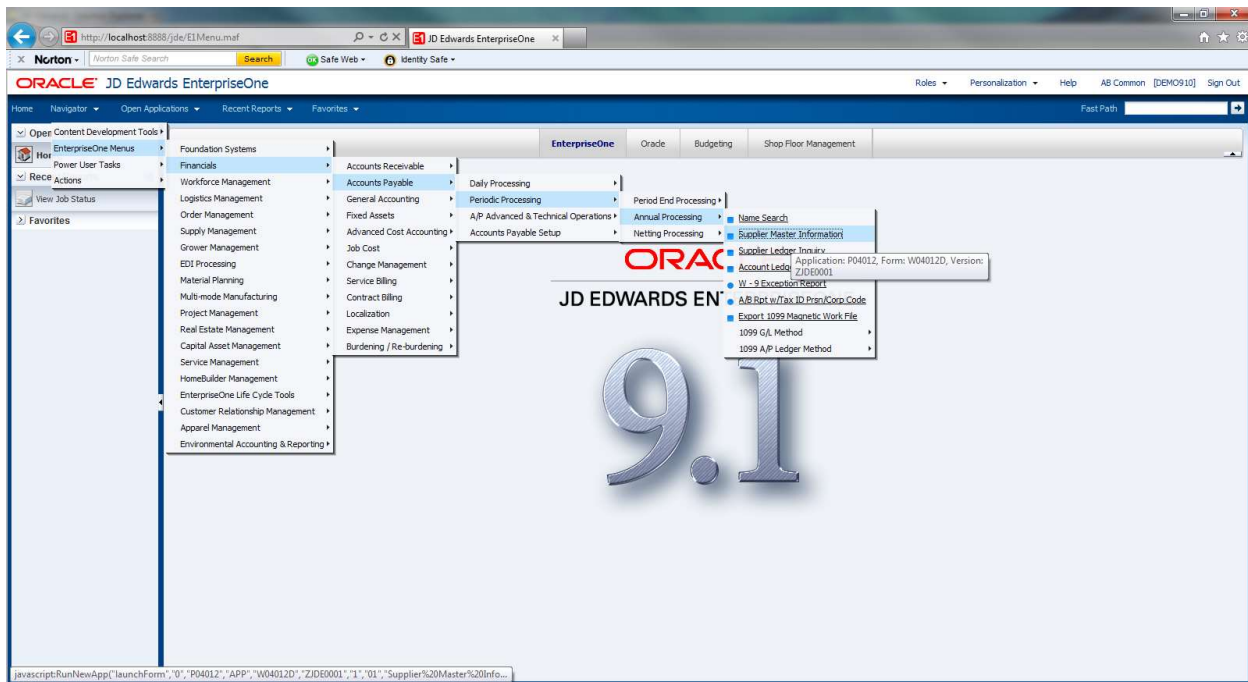
The critical trade-off here is that by removing the duplication in your Task View (and ensuring that you have only one Task View) you are putting the long-term interests of both your users and your administrators before any instincts that your business analysts and administrators may have to stick with what they know. This is because while learning new concepts is always an extra task to anyone (typically unwelcome to fit in within an already busy schedule). Anyone who has worked with Menu Filtering knows that it is both very easy to set up and maintain and it is very effective at enabling your users to just see the folders and programs they require to perform their duties in an otherwise uncluttered screen.

‘3 Clicks Gets You There’ - Limiting Menu Depth

‘Menu depth’, is the number of nested folders that you need to navigate before you get to an executable program or report. In the delivered Task Views this can vary from a depth of 2 to up to 12! The deeper your menus go, the more clicks your users have to make before they get to an actual program. More clicks equates to more time needed to get the job done, and more likelihood of confusion when you are trying to get to where you need to be.

In order to speed things up, it is recommended you adopt a policy of no more than 3 clicks to launch a program or report. This means that your menus will need to be relatively shallow, with no more than 2 levels of folders before getting to a program or report. This is especially important in light of the latest release of EnterpriseOne.

In Enterprise One 9.1 the new web interface is no longer persistent. Once a user has clicked on a program, the entire navigation path is hidden. Having deep menus also now makes it a much longer process to launch multiple programs from the same folder.



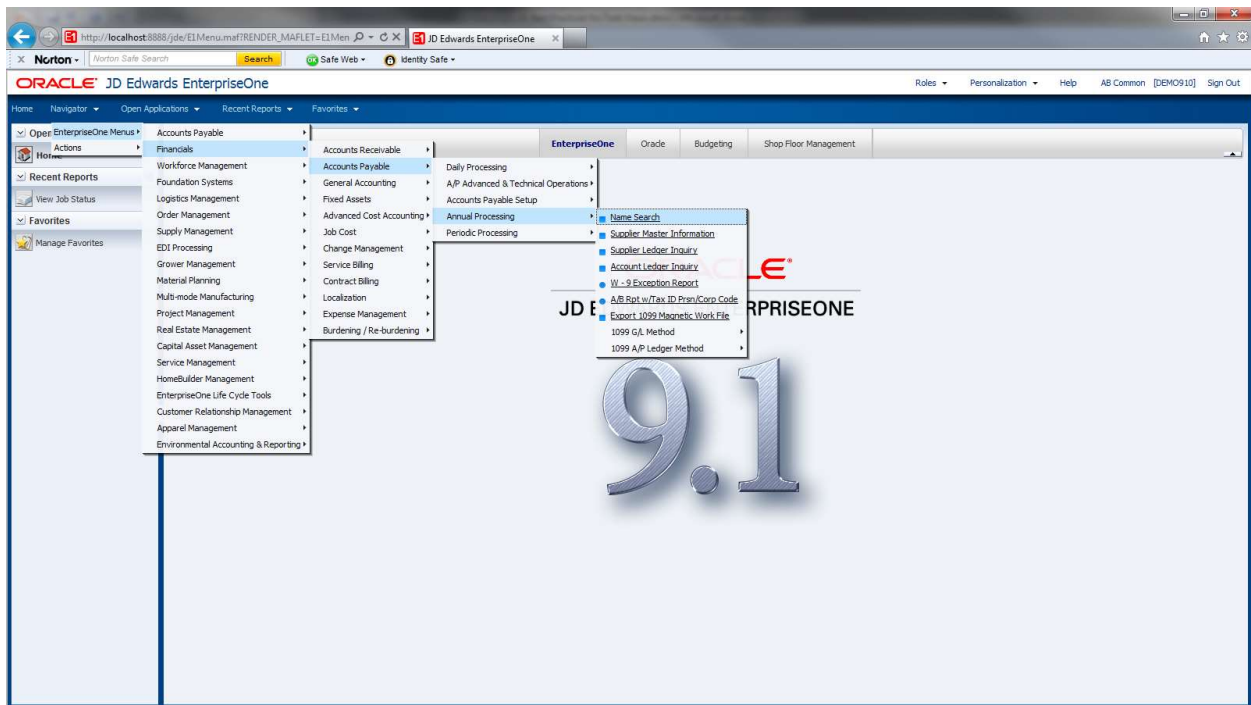
Menu Filtering (Fine Cut) – Decluttering the Interface

Menu filtering is the cornerstone to the final appearance of the Task Views to your users – in our view it is essential to both maximize user satisfaction with the system and to maximize speed (productivity) and minimize errors (by showing only the right version of a program).

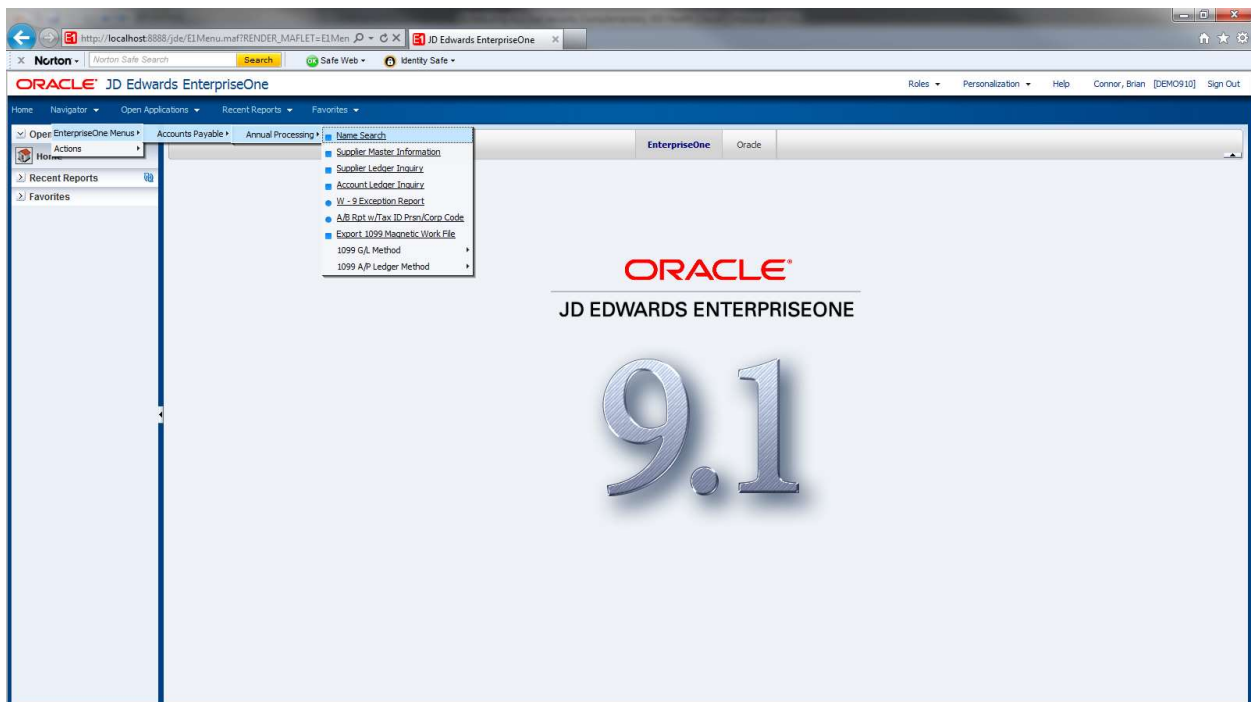
The great thing about it from the IT perspective is how simple and easy it is to set up. Note that Menu Filtering was formally known as Fine Cut in Xe and that there is indeed no difference whatsoever between what is known as Menu Filtering in later versions of JD Edwards and the original Fine Cut used by Xe systems.

Menu filtering is done at the role level rather than at the user level. To apply Menu Filtering, you hide the folders and/or programs you do not want a particular role to see. If Menu Filtering is not utilized, your users will have a dizzying array of choices amongst all of the modules. By filtering the menu, your users are left with only those folders that lead to a program or report that they need as part of their job duties. This makes navigation clean and simple.

This is a view without any Menu Filtering:



This is a view with Menu Filtering utilizing a '3 clicks gets you there' approach:



Menu Filtering and Security

It is important to remember that Menu Filtering is NOT security. If you are using an open security model, users can still get to almost any program through the use of form and row exits.

So while Menu Filtering is a great tool to simplify user access it is NOT the panacea to security exposure and cannot secure your users from unauthorized access to programs and reports. To achieve security, a “deny all”, or closed security model is required. For more information on how to achieve a closed security model, contact hazel.jackson@ALLOutSecurity.com or request the dedicated white paper.

In addition however, note that the effects of not using Menu Filtering ARE to complicate the security requirements that your business may later request. For example, if you do not use Menu Filtering, there is more likelihood that your users will be confused by multiple versions of programs on their menus which will in turn lead to requests to activate version level security.

Can ALLOut Help?

You bet – we wouldn't have put time into creating software that didn't speed up and simplify maintenance and project activities. ALLOut offers a variety of software programs designed to help including WYSIWYG (“what you see is what you get”) grids that you can simply type into:

- A grid that allows you to maintain (and upload spreadsheets of) Task Views
 - A grid that allows you to maintain (and upload spreadsheets of) Tasks
- A grid that enables you to compare security and Fine Cut for roles
 - A grid that allows you to upload spreadsheets of Fine Cut

If you are like most EnterpriseOne sites and are not following some or all of the above best practices, it's time to get in touch with ALLOut Security so we can show you how easy it can be to change how you do things. Contact Sales@ALLOutSecurity.com for more information.

Conclusion

Task Views are not Menus! While this seems to be self evident, many EnterpriseOne implementations have structured their Task Views just like their old custom menus. It's time to change the way you look at your Task Views and follow these 3 simple best practices:

- Use a single Task View for ALL users
- 3 clicks should 'get you there'. A user should not have to click more than 3 times before launching a process
- Menu filtering is your friend. Use Menu Filtering in conjunction with security to limit what your users can see. This makes navigation easier, and users more productive.

For sites coming from a menu based user interface, it can be difficult to make the transition from using a custom menu for each department to all users utilizing a single Task View - so it is important for decision makers, as well as end users, to understand the concepts as well as the benefits realized from this approach. The alternative is that decisions can be taken that detract from the user experience (thus adversely affecting user productivity) and that long-term maintenance requirements will be increased unnecessarily.

New with Enterprise One 9.1

The latest Tools Release introduces a new navigation process for all web users. If you currently have lots of Task Views, or very deep menus, your users will now take even longer to get to their applications and reports. While the new pages may ease the burden eventually (in the same way as 'Favorites' can) it will ultimately be the Task View structure that simplifies or complicates your company's use of JD Edwards.