PURPLE SERVICES

2BCS

IFS Permissions Webinar

Webinar 1: Limitations of Permissions Management in IFS & Site-specific roles

27 February 2025

Dr. Martin Brogli
Jafar Sabadia

Dr. Martin Brogli

CEO & Founder

Personal

Year of birth:	1965
Nationality:	Swiss/USA
Residence:	Hauptwil (TG)
Marital status:	Married, 3 children

Academic title

Dr. oec. HSG

Languages

German	mother tongue
English	mother tongue
French	business fluent

Expertise

Industries: machinery, engineering, building, pharma, chemicals and cosmetics

Services: Application strategies, implementation and change management

Education

University of St. Gallen, focus on business information management

Doctorate at the University of St. Gallen

Career

2 years Foundation for Information Management

7 years Helbling Management Consulting

2 years BSG Management Consulting

Founded 2BCS AG in October 2006

Jafar Sabadia

Senior Consultant

Personal

Year of birth:	1992
Nationality:	Swiss
Residence:	Cham (ZG)
Marital status:	Married, 1 child

Academic title

M.A. Business Innovation HSG

Languages

German	mother tongue
English	mother tongue
Arabic	mother tongue
French	fluent

Expertise

Permissions management
Test management
ERP evaluations and implementation
IT-business-process optimization

Education

University of St. Gallen, Master in Business Innovation

Career

IT consulting at 2BCS since 2017
Work experience at misc. internet startups
1-year work experience in IT support

CERTIFIED
Project Manager
Business Software
CERTIFIED

2BCS and Purple Services

2BCS AG

- Consulting Company
- Focus on neutral ERP and evaluations and implementation support for SAP, Infor, IFS and D365
- 11 employees
- Cooperation with Trovarit, our common evaluation platform
- Since 2006
- In the Roles & Permissions area:
  - Concepts, audits, best practice, and hands-on support

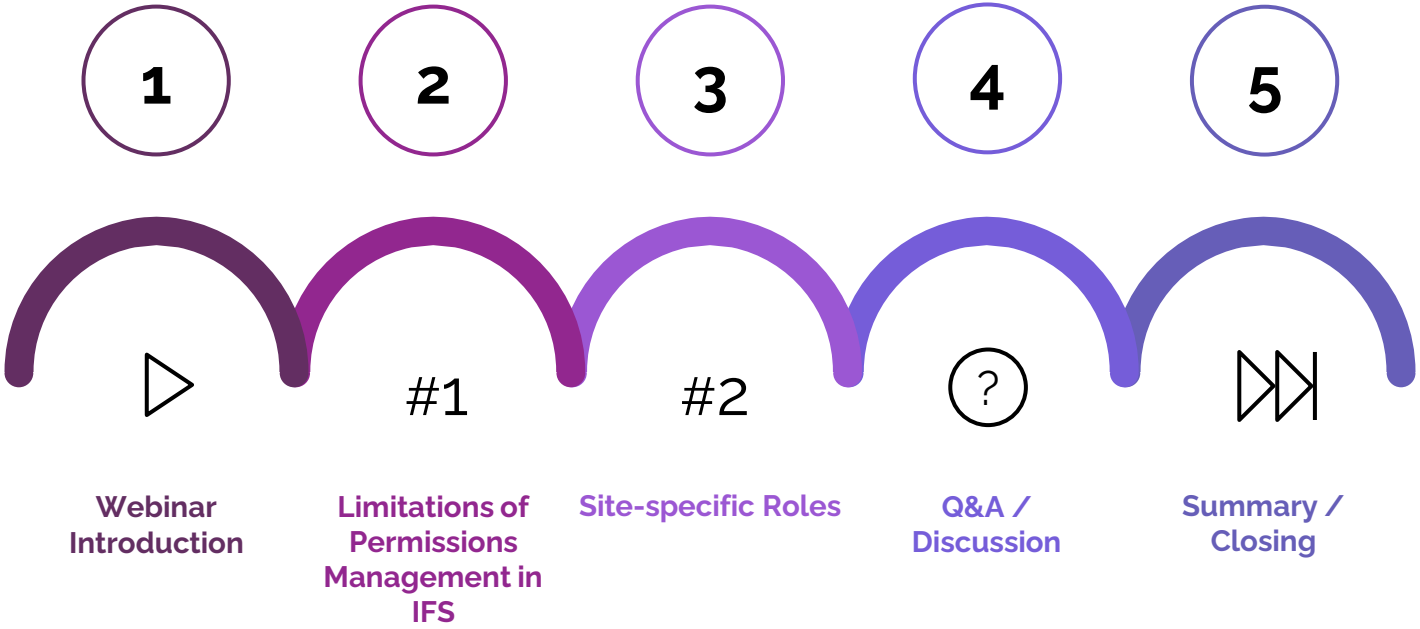
Purple Services AG

- Software Company
- Focus on designing, selling, and supporting the IFS Permissions Manager Tool
- 2 part-time employees from 2BCS
- Cooperation with Trivo, a software company in Sri Lanka
- Since 2022
- In the Roles & Permissions area:
  - Subscription of IFS Permissions Manager and Onboarding

Our Services in the Roles & Permissions (R&P) area

	Audit of R&P set-up	R&P Concept & Training & Templates	R&P Conversion 10 → Cloud	IFS Permissions Manager
Contents	Audit and recommendations to optimize your R&P concept, processes and set-up in IFS	Creation of an R&P concept and training based on client's situation and expectations	Semi-automatic conversion of R&P from IFS 10 to IFS Cloud incl. checks and corrections	The IFS Permissions Manager Tool including hosting and onboarding
Benefit	Best practice and proven improvement proposals	Efficient and correct start for your R&P concept, training and templates	Minimal effort and time needed to transform existing R&P into IFS Cloud R&P	The most effective way of managing IFS R&P incl. Reporting

Agenda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Webinar Introduction
Limitations of Permissions Management in IFS
Site-specific Roles
Q&A / Discussion
Summary / Closing

Webinar Introduction

1

NEW WEBINAR SERIES

Centered around the topic of Roles and Permissions in IFS

2

CHALLENGING TOPIC

In our experience this is a topic that is difficult to execute in IFS and almost every customer is affected by it

3

OUR GOAL

Our goal is to share knowledge, build up a community and help people get in touch with each other

4

WEBINAR FORMAT

- Primary topic presented by 2BCS / Purple Services
- Secondary topic by guest speaker
- Q&A and discussion at the end

5

QUESTION MANAGEMENT

Submit questions anytime via the Q&A feature in Teams, we will address them during the Q&A section at the end

6

RECORDINGS

The webinar will be recorded and will be shared on the webinar website

Limitations of Permissions Management in IFS

Topic 1

Limitations of Permissions Management in IFS

#	TYPE	LIMITATION	IFS VERSION
1	**General**	**No official methodology**	**All**
2	**General**	**No standard roles or templates**	**All**
3	**General**	**Limited consulting support**	**All**
4	**Technical**	**IFS updates disrupt permission sets**	**Cloud**
5	**Technical**	**Missing projections in "Manage by Navigator“**	**Cloud**
6	**Technical**	**Permissions are site-neutral**	**All**
7	Technical	Lobbies dependencies	Cloud
8	Technical	Inadequate reporting features	All
…	*Both*	*Many others …*	*All*

Limitation #1
No official methodology

- flexible permission sets
- no recommended structure or best practices
- Every customer must define their own approach

Solutions/Workarounds

- Decide: develop a concept / structure internally or seek external expertise
- KISS principle:
  - role-based structure
  - avoid deep hierarchies
  - manageable number of end-user roles
- More details in a later webinar

Limitation #2
No standard roles or templates

- There are some predefined technical roles
- But there are no process-based templates
- Roles must be built from scratch

Example

Permission Set	Description
AAAS_ADMINISTRATOR	Analysis Models Power BI - Administrator - End User
AAAS_DL_USER	Analysis Models Power BI - Data Lake - End User
AAAS_UPLOAD_USER	Analysis Models Power BI - Upload Model - End User
ABSENCE_INTEGRATIO...	Role needed for Absence Integration user
AC_CONFIG_CON_BOARD	Full access grants for Allowable Configuration Control Board
AC_CONFIG_SPECIALIST	Full access grants for Allowable Configuration Config Specialist
AC_ENG_SERVICE_PART...	Full access grants for Allowable Configuration Engineering Service Partner

Solutions/Workarounds

- Decide: develop a roles internally or seek external expertise
- KISS principle:
  - role-based structure
  - avoid deep hierarchies
  - manageable number of end-user roles
- More details in a later webinar

Limitation #3
Limited consulting support

- IFS and its partners typically do not offer non-technical consulting for permissions — though this might differ from one region to another
- Customers must either build expertise in-house or find external consulting support

Solutions/Workarounds

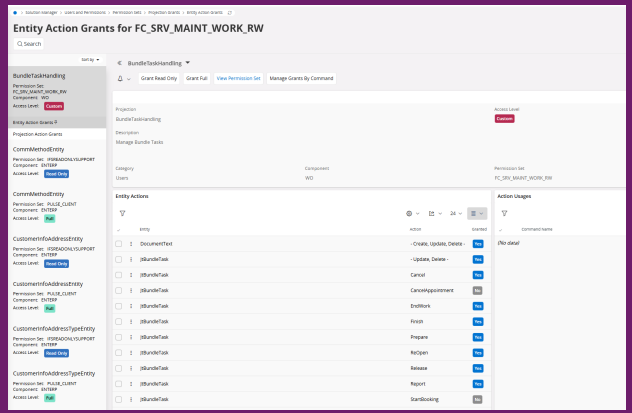
- Decide early: manage permissions internally or work with non-IFS consultants
- If managing internally:
  - dedicate enough resources — especially critical during implementation and upgrades
  - network with other IFS customers to exchange insights and best practices

Limitation #4

IFS updates disrupt permission sets

- Updates can change projection structures
- Example: A "read-only" projection changes to "custom"
- Indication that something has changed, usually requires manual review and adjustments

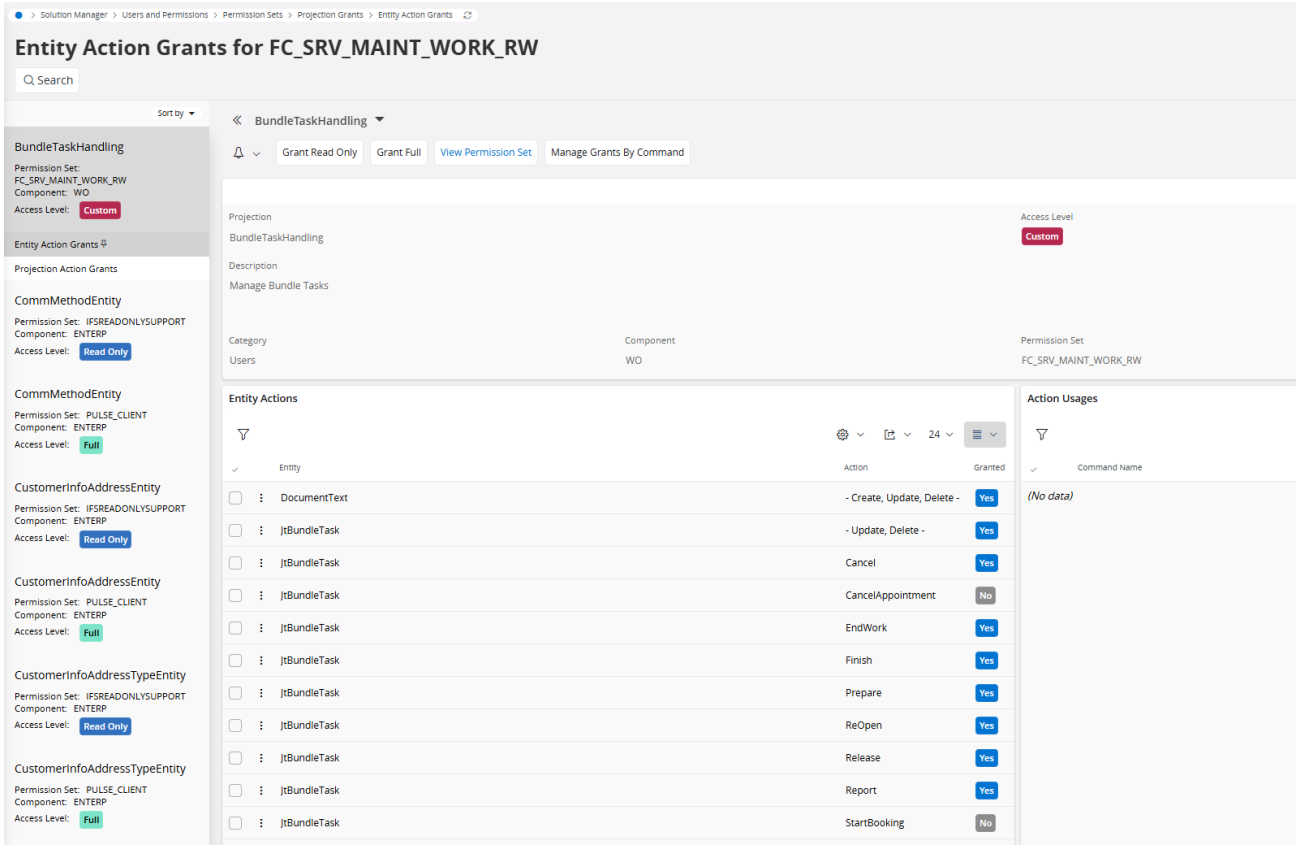
Example



Solutions/Workarounds

- Use clear naming conventions and documentation
- E.g. the name "Purchase Order Read & Write" along with a clear documentation that tells you what is granted with which access level
- This lets you know what to adjust after an update

Limitations of Permissions Management in IFS



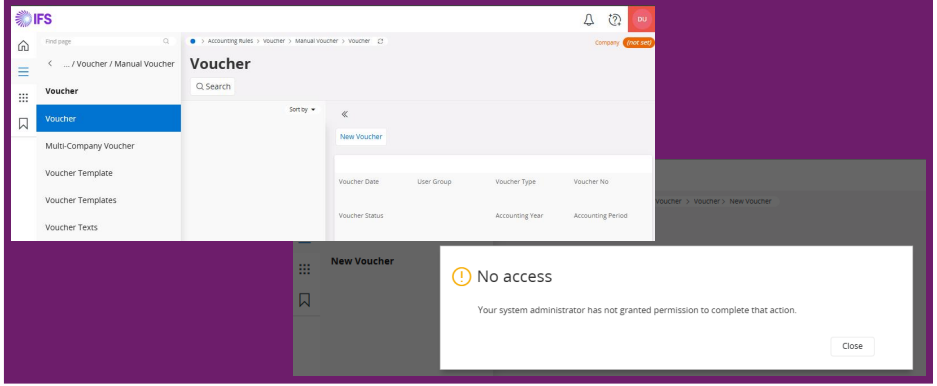
Limitation #5

Missing projections in "Manage by Navigator"

- Some projections are not visible in the Navigator
- Accessible only via specific URLs or by navigating through multiple pages
- Permission sets could miss key projections
- Often found only after extensive testing or live usage

Example

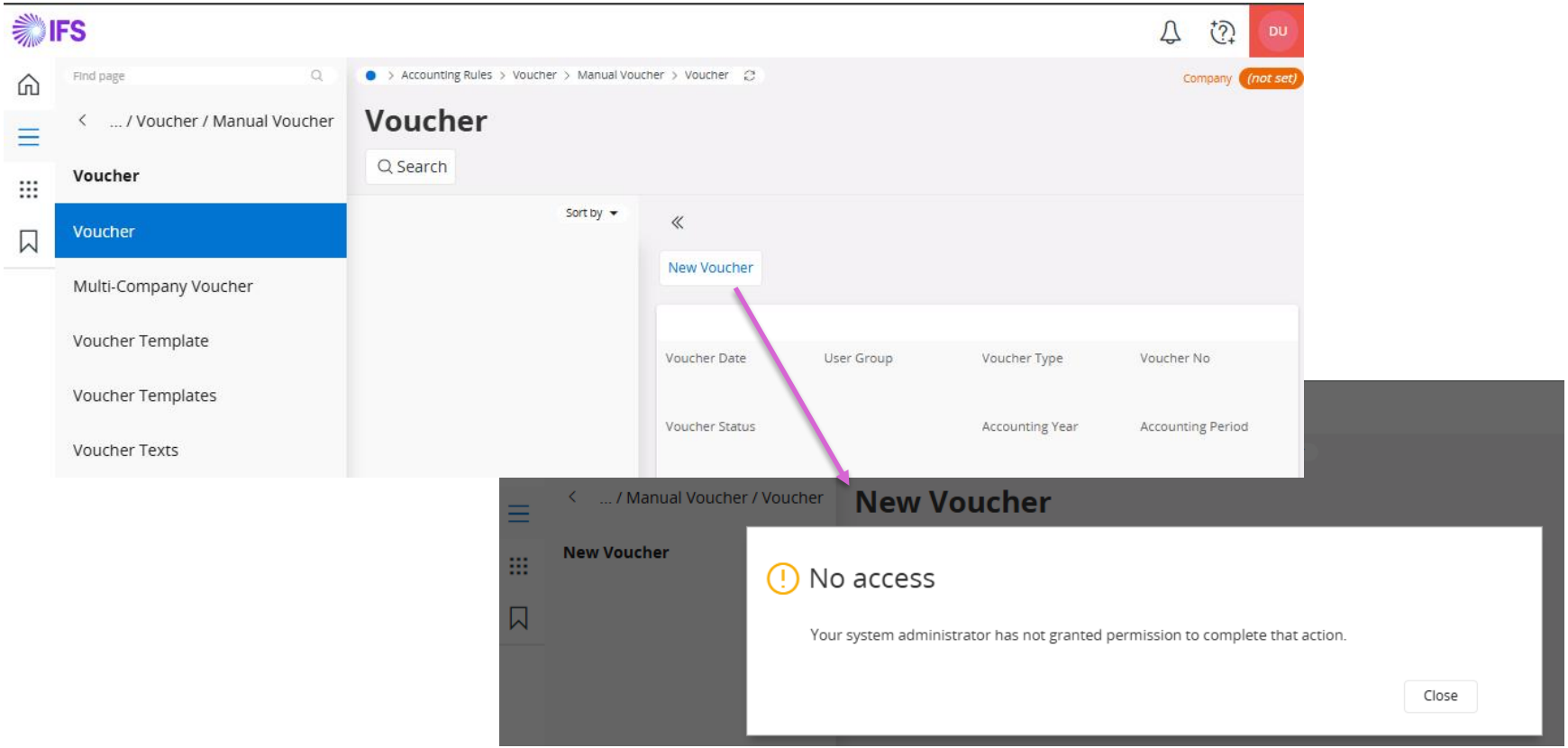
This permission set grants full access to everything under “Financials“ and “Accounting Rules” via Manage by Navigator



Solutions/Workarounds

- Thorough testing before go-live is critical for identifying missing projections
- Alternatively, purchase predefined, tried and tested permission sets to reduce manual troubleshooting

Limitations of Permissions Management in IFS



Limitation #6
Permissions are site-neutral

- IFS does not allow different permissions for the same user across different sites
- This is different from many other ERP systems, where user permissions can vary by site

Solutions/Workarounds

- The simplest option is to accept this limitation and hope for future improvements
- Some customers, like Doppelmayr, use a workaround: creating separate IFS users for each site

Site-Specific Roles

Topic 2

IFS-Permission Special-User Handling

IFS Permissions Webinar: Limitations of Permissions Management in IFS & Site-specific roles

DIJ, Februar 2025

Agenda

1. Doppelmayr as Group
2. ERP-Organisation
3. User Management
4. IFS Special-User

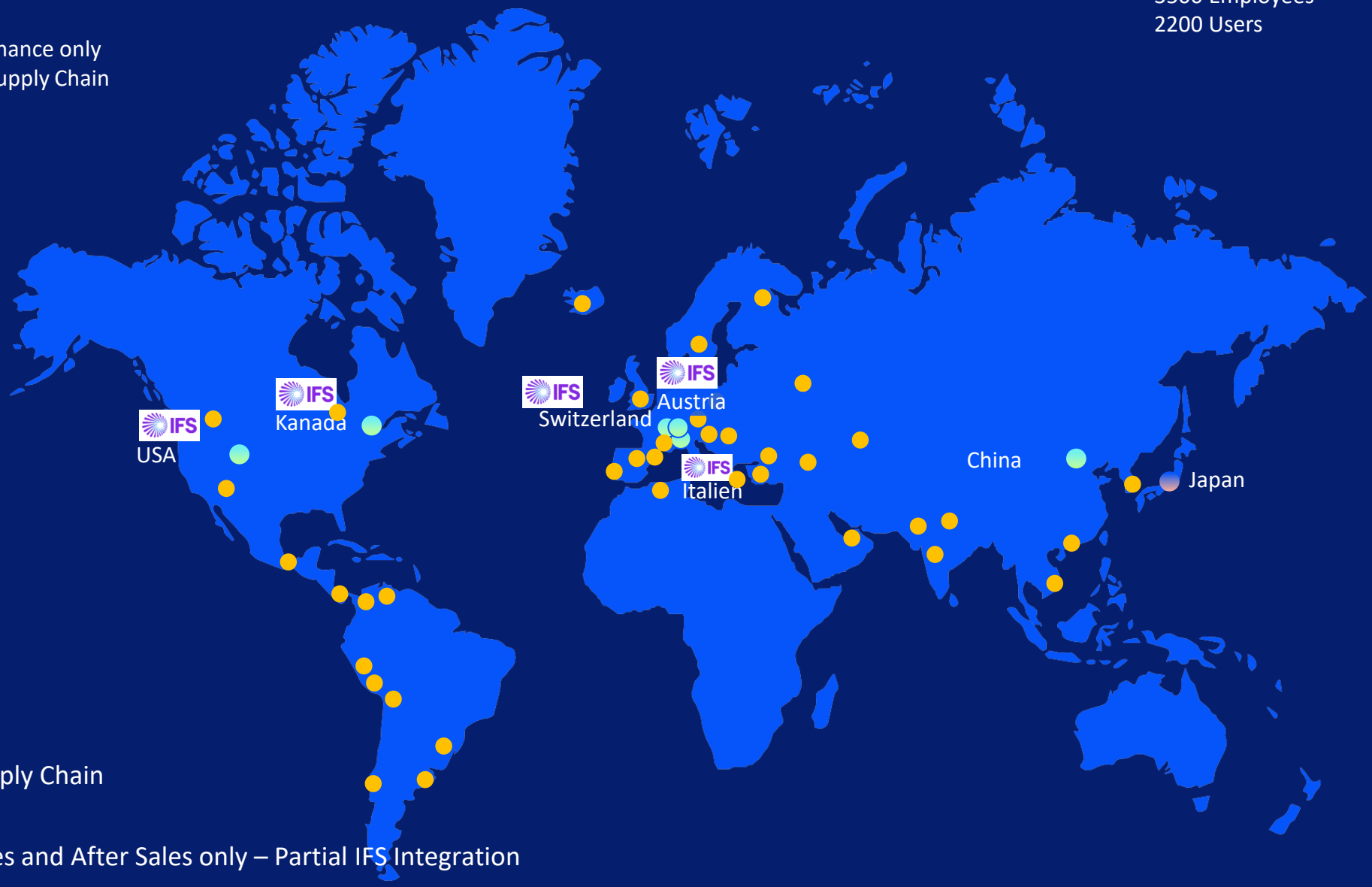
Doppelmayr as Group

IFS related

Doppelmayr Group Worldwide

40 Companies with IFS Finance only
13 Companies with IFS Supply Chain

3500 Employees
2200 Users



- Companies with Supply Chain
- Licence-Locations
- Companies with Sales and After Sales only – Partial IFS Integration

IFS-Environments and Installation

IFS V10 Update 25 as On Premise installation in Wolfurt

Only one instance worldwide

IFS Cloud Upgrade Project got started

Employees / Users

Relation between employees and users of engineering and/or manufacturing oriented IFS companies

Users / Employees in %	IFS Companies	IFS Companies Locations
97	Doppelmayr Cable Car GmbH	Austria
97	Doppelmayr Transport Technology GmbH	Austria
79	Frey AG Stans	Switzerland
67	Gassner Stahlbau GmbH	Austria
64	Garaventa AG	Switzerland
64	LTW Intralogistics GmbH	Austria
62	CWA Constructions SA	Switzerland
60	Doppelmayr Seilbahnen GmbH	Austria
55	DOPPELMAYR CANADA LTD.	Canada
45	Doppelmayr Italia Srl con socio unico	Italy
39	Doppelmayr USA, Inc.	USA

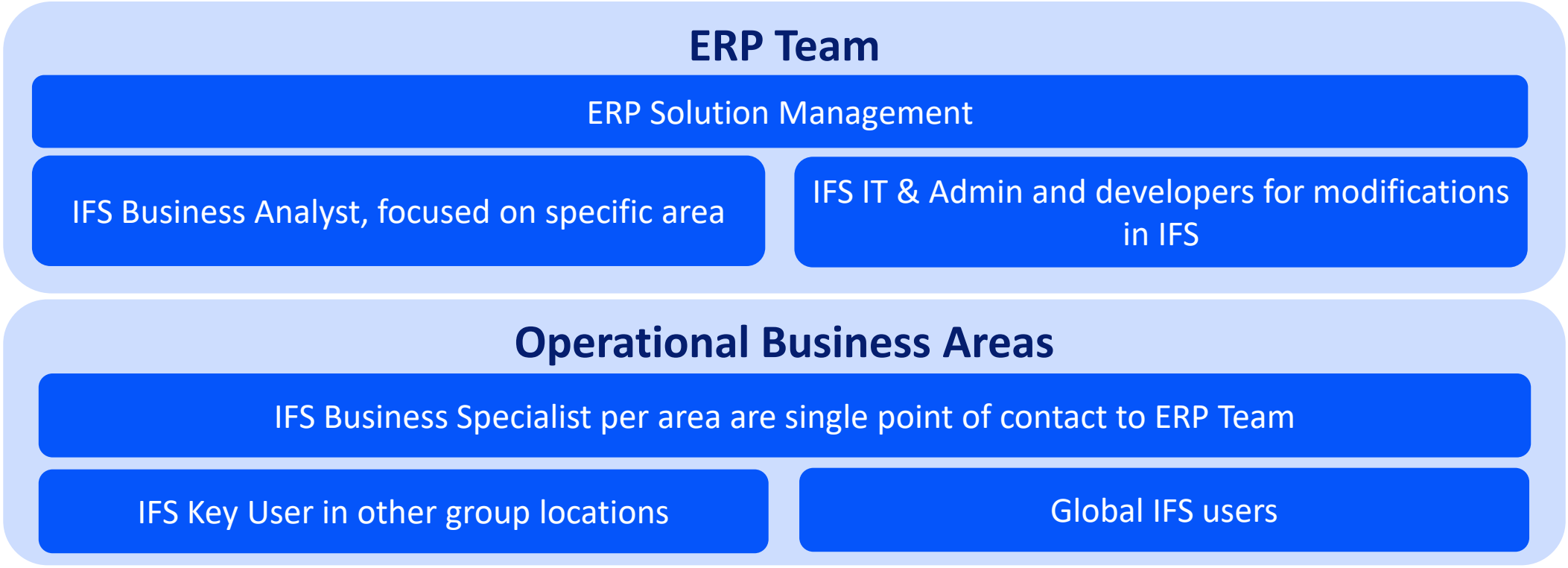
ERP Organisation

ERP Organisation

ERP Organisation of the Group

ERP Team with around 20 people – split in Business Analysts and ERP Developers

The operational Business is divided into 10 areas - one or two Business Specialists (Super Key User) per area and regular Key User in other group locations.



ERP Organisation

Environments and Modification Costs

Around 1000 Developer Days for modifications per year

=> Very high effort for preparing and testing the changes

ERP Organisation

IFS Tasks of the operational business

In the areas are installed

- Business Specialists
  - Employees of DM-Seilbahnen and DM-Garaventa
  - Single point of contact regarding the ERP Team
  - Responsible for First/Second-Level-Support worldwide
  - Responsible for testing the modification in the responding environment
  - Input of new requirements and developments

  => Extended permissions in IFS are required and needed
- Key-User
  - User in all other global locations
  - Contact person for Business Specialists

  => No special permissions are needed for their daily business

User Management

User Management

Single-Point of Truth

- User Management and permission handling not in IFS
- External tool is in use for permissions and user management (User Life Cycle) and user configurations
  - Configurations – basic data and master data (Coordinator, Buyer, Default Site, …)
  - External tool creates a script to executle in IFS
  - E-Roles and F-Roles get managed
  - Read / Write and Revoke definitions get managed
- Different permissions and configurations per environment and User is possible to handle
  - Different permissions sets per user in different environments
- Relation of User – Permission – Configuration – User Groups are visualised

IFS Special User

IFS Special User

Definition of Special User

- Special Users are created for ERP Team and Business Specialists → not or only selected Key Users
- Special Users are also used for Interfaces into IFS
- Special User are configured for the specific usage → Special Users can also be created as IFS Employee
- One IFS Person can reference to several IFS Users
- Special Users are not part of the daily business

IFS Special User

Background and Reasons for Special User

- Business Specialists are responsible for global support and modification testing
  - Extended permissions are required
  - Access to all companies are required
- Interfaces use also Special Users or System Users
  - Extended permissions are required
  - Access to all companies are required
- All activities, done with Special Users are saved in History Logs and Transactions

IFS Special User

Consequences of Special User

- Special User has to be licensed as a regular user → higher costs
- Doppelmayr uses an Enterprise Licence → is helpful
- Special User can be handled as regular user of the regular user management
- Special User helps also for audits and report → Special User = Special Permissions

Thank You

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Doppelmayr

Q&A / Discussion

Summary / Closing

- Permissions Management in IFS has **many shortcomings and limitations** – there are some viable **workarounds** in some cases
- We hope that you were able to get some **new insights and ideas**
- The next webinar is scheduled to take place on **24 April** at the same time
- The topic is **Permissions Methodology** & Details about **24R2** with a guest speaker from **Arcwide**
- If there are any specific issues that you would like to discuss individually, feel free to **reach out to us**
- We are always open for further **topic suggestions** – let us know!

THANK YOU

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