PURPLE SERVICES

2BCS

IFS Permissions Webinar

Webinar 2: Permissions Methodology & Details about 24R2

24 April 2025

Dr. Martin Brogli
Jafar Sabadia

Dr. Martin Brogli

CEO & Founder

Personal

Year of birth:	1965
Nationality:	Swiss/USA
Residence:	Hauptwil, Switzerland
Marital status:	Married, 5 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, Switzerland
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
- 14 employees
- Cooperation with Trovarit, our common evaluation platform
- Founded in 2006
- In the Roles & Permissions area:
  - Concepts, audits, best practice, and hands-on support

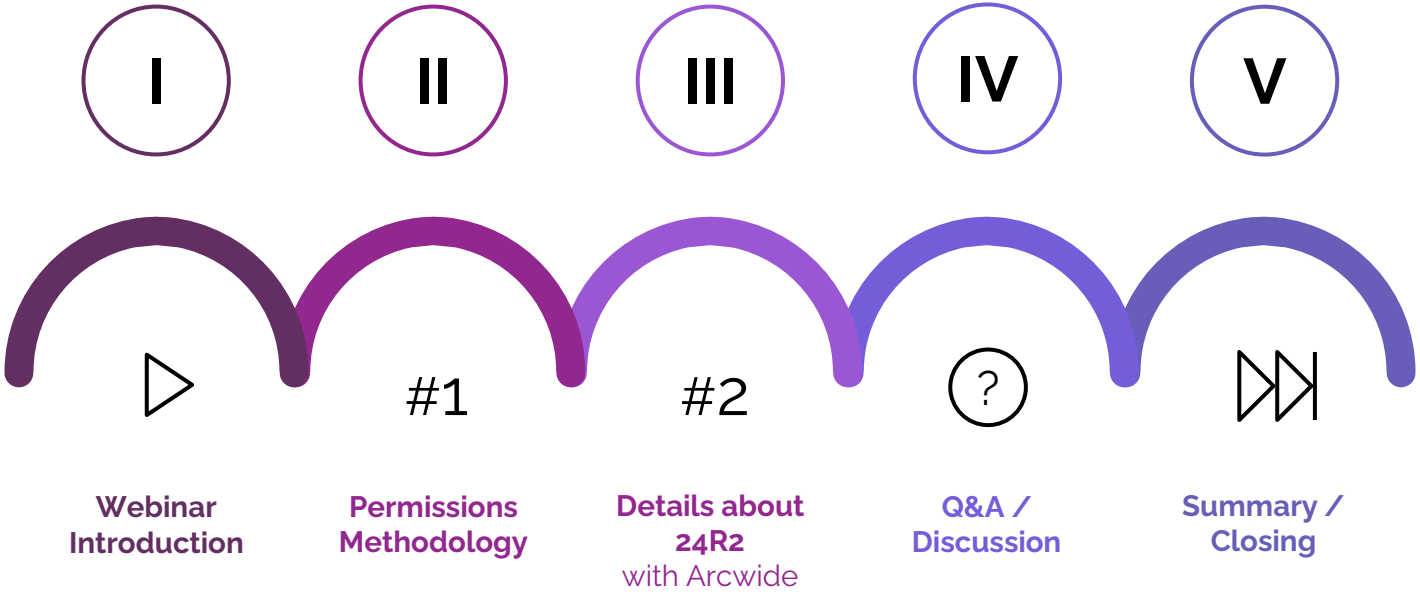
Purple Services GmbH

- 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
- Founded in 2022
- In the Roles & Permissions area:
  - Subscription of IFS Permissions Manager and Onboarding

Our Services in the IFS 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


I
II
III
IV
V
#1
#2
?
Webinar Introduction
Permissions Methodology
Details about 24R2 with Arcwide
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

Permissions Methodology

Topic 1

#	Topic
1	Flexibility vs. Complexity
2	Best-Practice Two-Layer Model
3	IFS Cloud vs. IFS Apps 10 – Key Differences
4	Best Practices for Reports and Lobbies (IFS Cloud)

- As discussed in Webinar 1, there is no official methodology for permissions setup in IFS
  - no recommended structure or best practices
- Flexible permission sets logic
- Common strategies: single-layer, two layers, multiple layers/ nested roles
- Mixed strategies often lead to confusion, redundancy

Limitations of Permissions Management in IFS

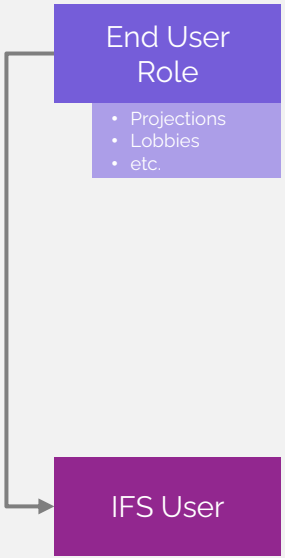
Discussed in Webinar 1

Limitation #1 No official methodology	Solutions/Workarounds

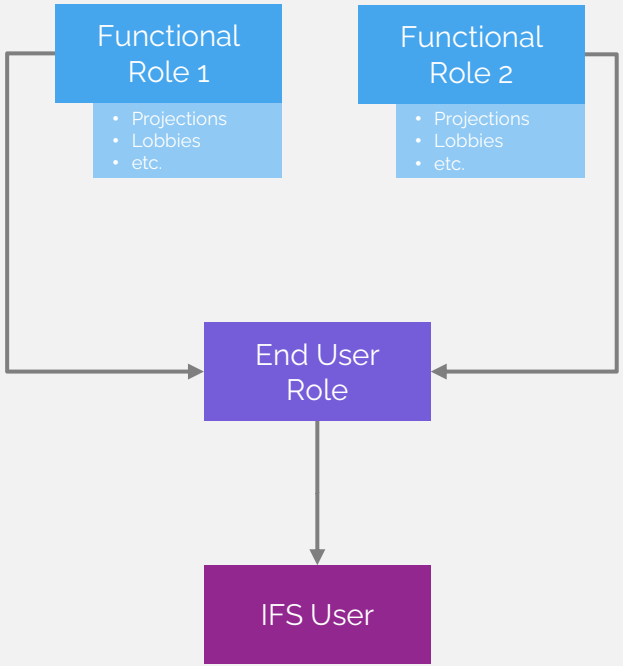
• flexible permission sets
• no recommended structure or best practices
• Every customer must define their own approach
	• Decide: develop a concept / structure internally or seek external expertise
	• KISS principle:
	  • role-based structure
	  • avoid deep hierarchies
	  • manageable number of end-user roles
	• More details in a later webinar

1) Flexibility vs. Complexity

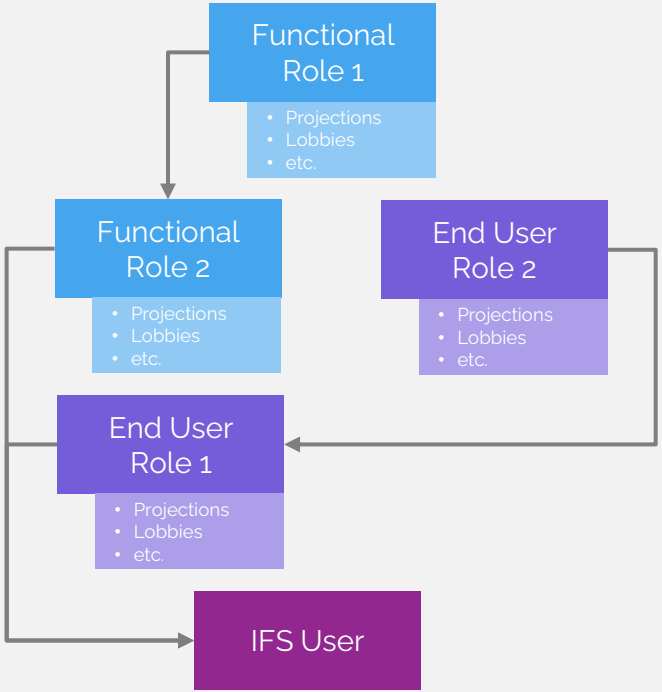
Single Layer



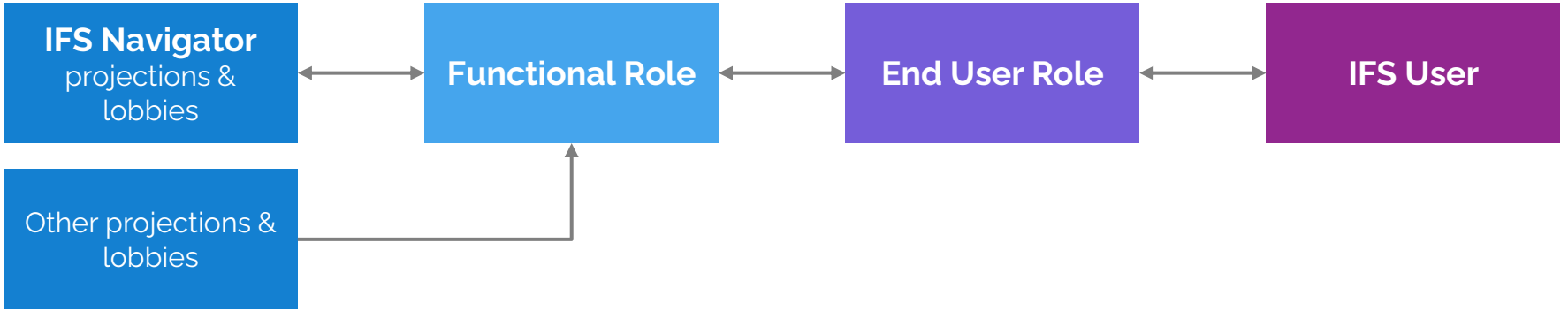
Two Layers



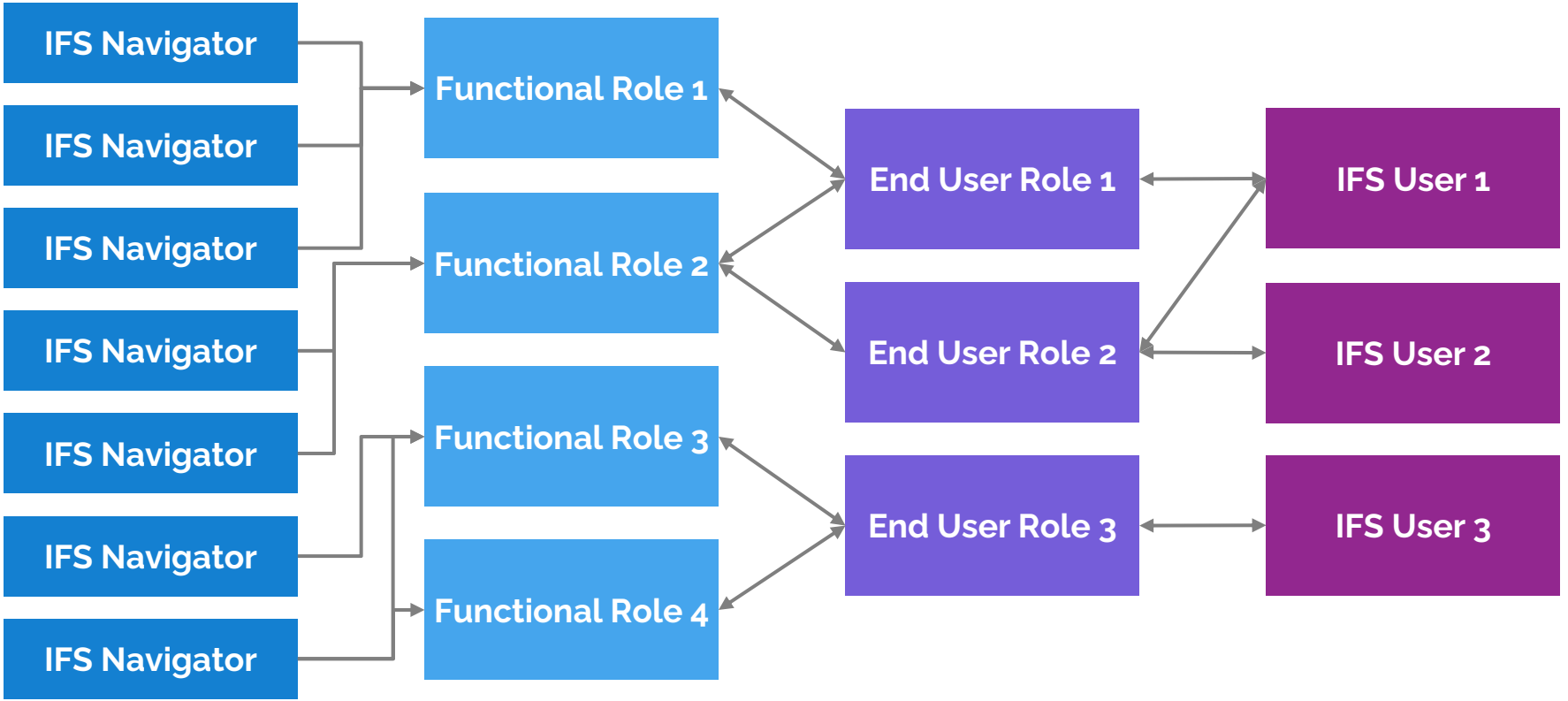
Multiple Layers / Nested



2) Best-Practice Two-Layer Model – Overview



2) Best-Practice Two-Layer Model – Detailed View



2) Best-Practice Two-Layer Model – Functional vs End User Roles

Functional Roles	End User Roles
• Contain projections, lobbies, and more • Do not contain other permission sets • Can be fine-grained (page-level), module-level or anything inbetween → more details in next webinar • Reusable across End User Roles • Maintained independently	• Contain only Functional Roles – no direct permissions • Role-based (job-level) • Assigned to users • Combines multiple Functional Roles to form a complete user role • Easy user management

2) Best-Practice Two-Layer Model – Design Principles

No nesting of Functional Roles

- Don't include permission sets inside functional roles
- Keeps the structure flat, auditable, and easier to troubleshoot

Maximize reuse of Functional Roles

- Design Functional Roles to be modular and broadly applicable
- Avoid duplication of nearly identical sets for different roles

Build for scalability and change

- Structure roles so that adding new users or permissions doesn't require restructuring
- New functions = new Functional Roles → assign to relevant End User Roles, nothing else changes

3) IFS Cloud vs. IFS Apps 10 – Key Differences

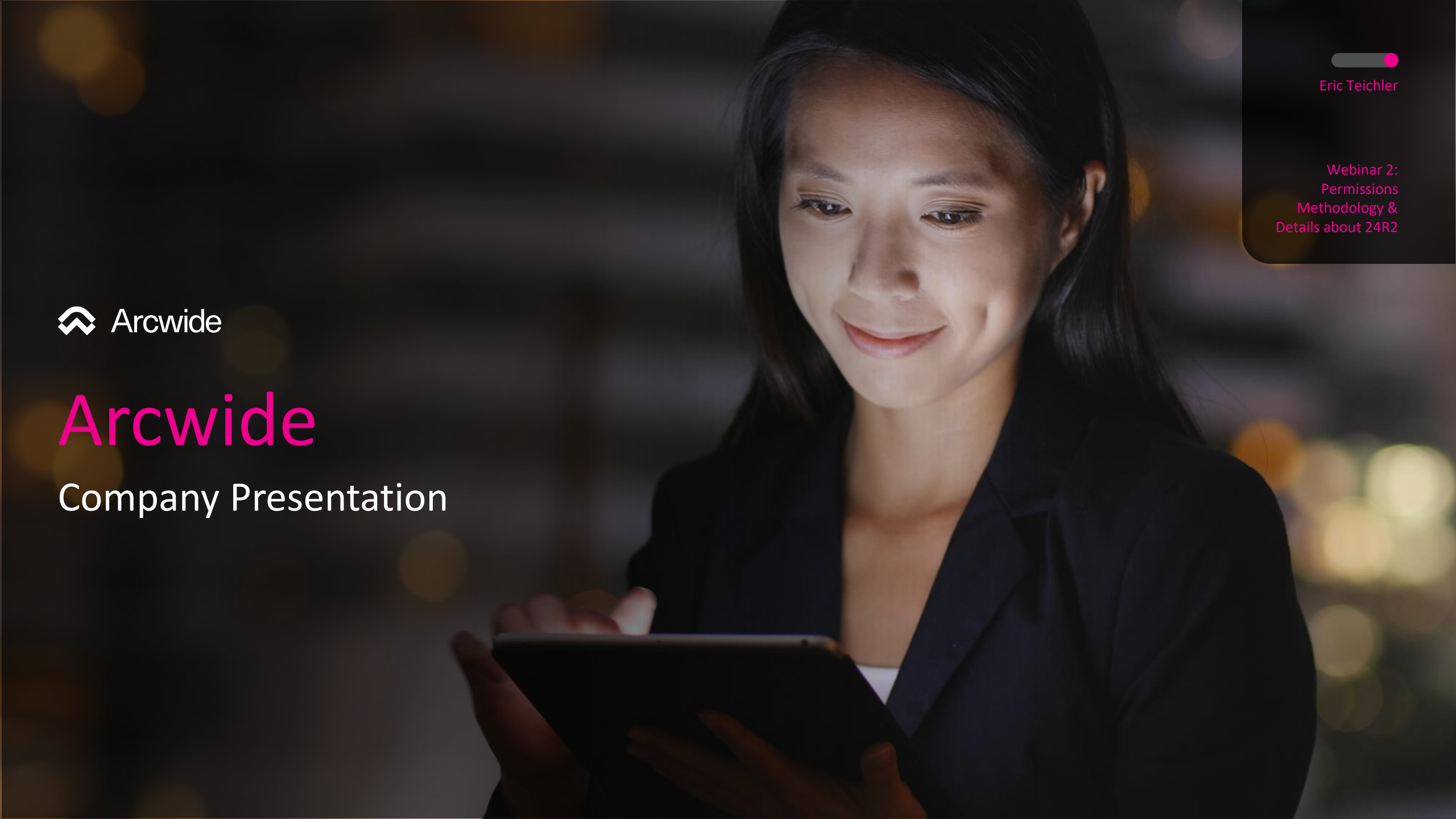
	IFS Applications 10	IFS Cloud
Security Model Foundation	UI-based – permissions tied to Presentation Objects (forms, windows, reports)	API-based – permissions granted via Projections (REST-based business logic layer)
Lobbies & Reports	Granted like screens in permission sets; tied to presentation objects	Lobbies tied to projections. Lobbies must include read access to data sources. Reports (Quick Reports, BR) granted via Functional or system roles.
Types of Securable Objects	Presentation Objects, Activities, IALs, Lobby pages	Projections, Lobby pages, System Privileges

4) Best Practices for Reports and Lobbies (IFS Cloud)

	(Quick) Reports	Lobbies
Commonalities in Permissions Handling	• Granted via Functional Roles, not to End User Roles • Recommended to group logically per business area	
Differences in Permissions Handling	• (Quick) Reports are individual projections • Recommendation: one Functional Roles per report or report group	• Lobbies are their own permission set objects • Requires access to Lobby page + all referenced projections • Recommendation: Lobby Functional Role includes lobby + all needed read access

Details about 24R2

Topic 2



Arcwide

Arcwide

Company Presentation

Eric Teichler

Webinar 2:
Permissions
Methodology &
Details about 24R2

Arcwide

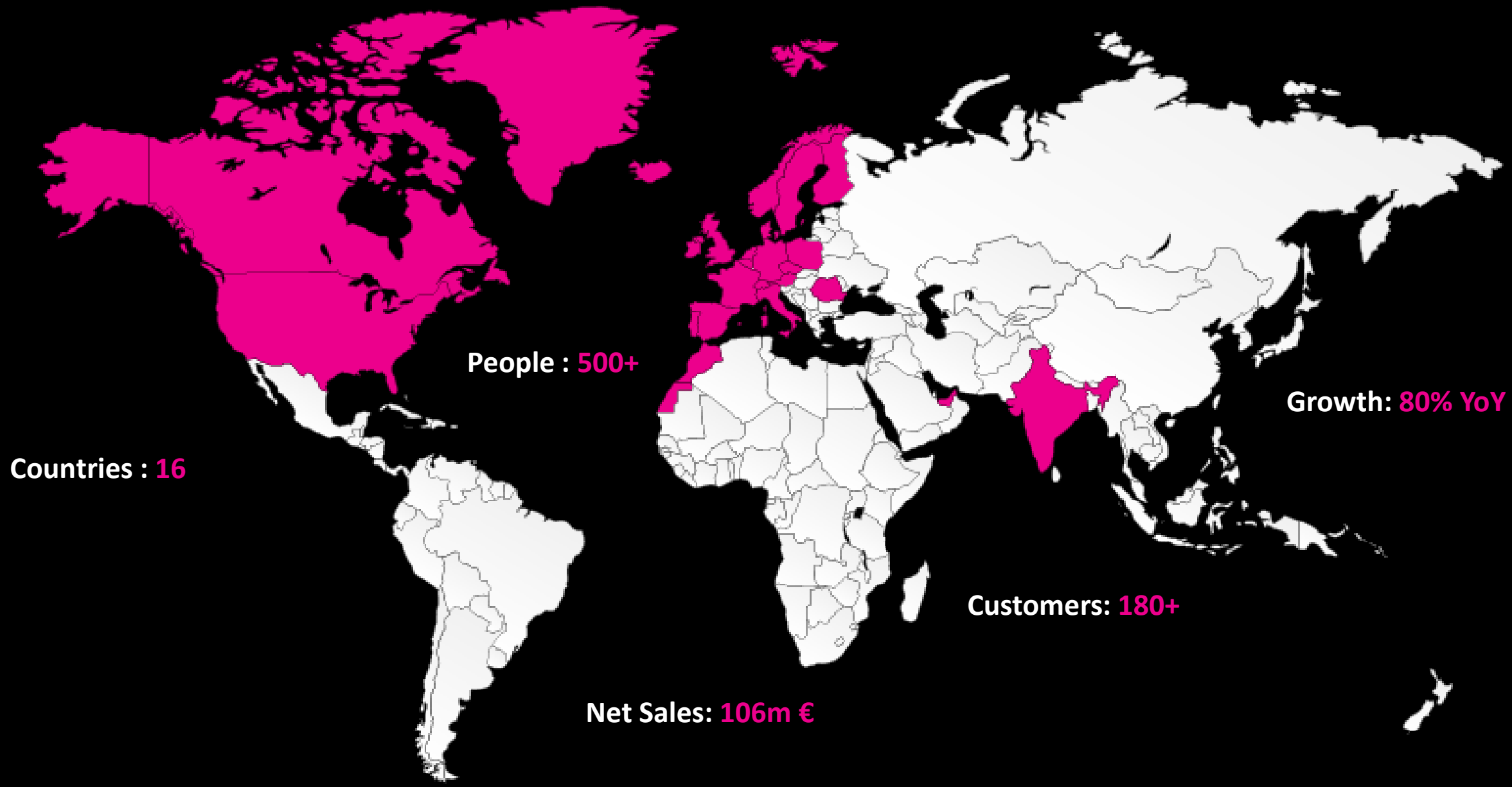
Arcwide the Unique IFS Cloud Systems Integrator

The Largest Global IFS Cloud Dedicated Business Partner

Arcwide - as a joint venture between IFS and BearingPoint - is an IFS Platinum Channel & Services Partner, offering comprehensive expertise across the entire IFS solution portfolio. Our capabilities span Enterprise Resource Planning, Enterprise Asset Management, Field Service Management, Enterprise Service Management, and ‘Best-of-Breed’ solutions such as POKA, IFS Assyst, IFS Ultimo, and Copperleaf.

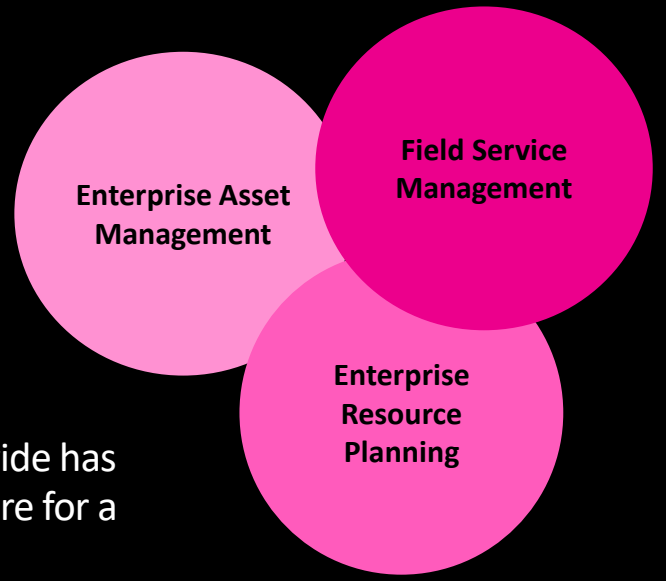
With a team of 500+ professionals across 23 offices in 16 countries, we leverage hundreds of years of combined IFS expertise. Our premium services cover the entire journey—from solution evaluation and procurement to business consulting, implementation, application management, and value enablement.

Our global reach and consulting network enables us to deliver worldwide



Arcwide

We are no strangers to your industry

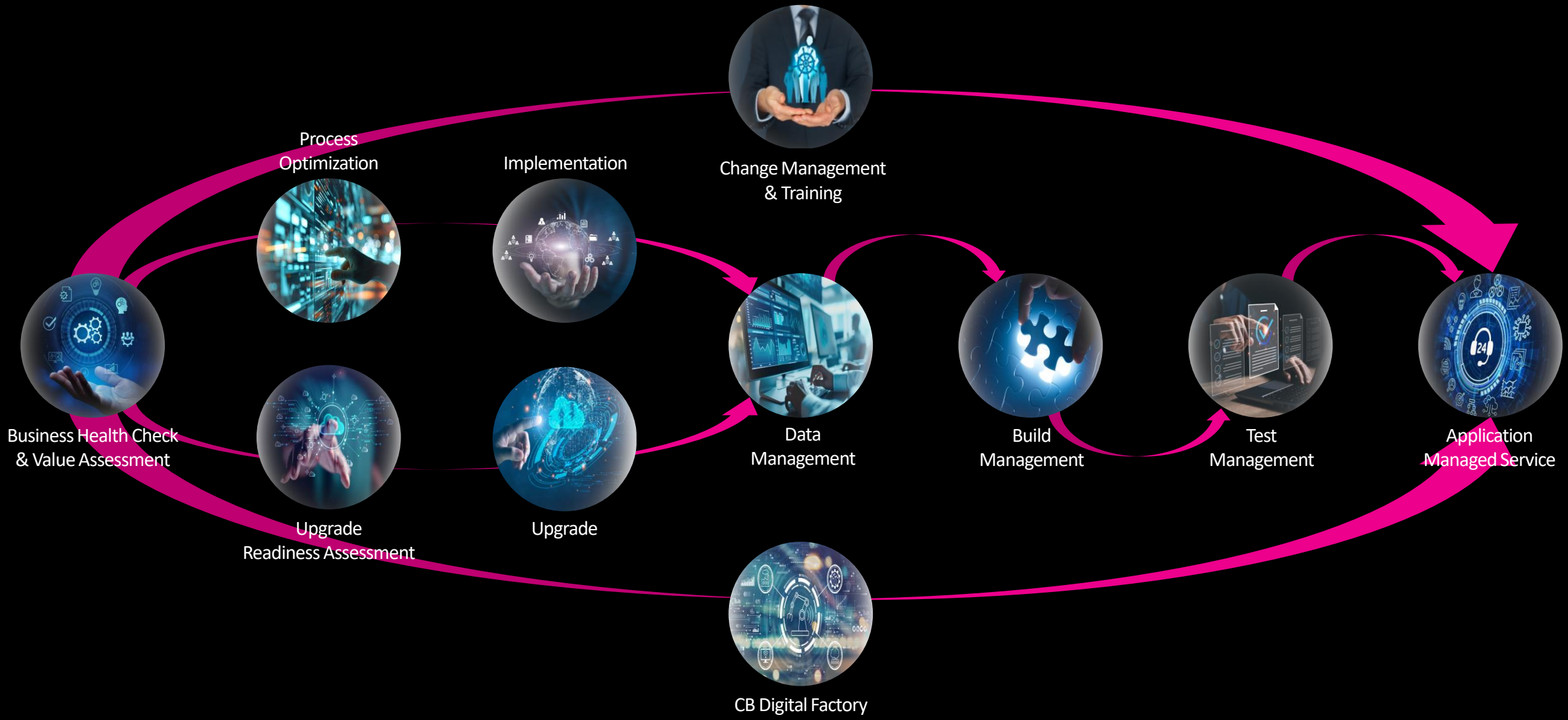


IFS Cloud is driving profitability, efficiency, transformation, and sustainability across multiple industries. Arcwide has extensive expertise and capabilities in all of these industries, and we understand today's challenges to prepare for a better and more sustainable tomorrow.

Global capabilities

Arcwide

Our proven end-to-end transformation services encompass:



IFS Cloud Update 24R#
Permission Related

IFS Managed Permission Sets for easy User Access Management

IFS Managed Permission Sets for easy User Access Management

Background

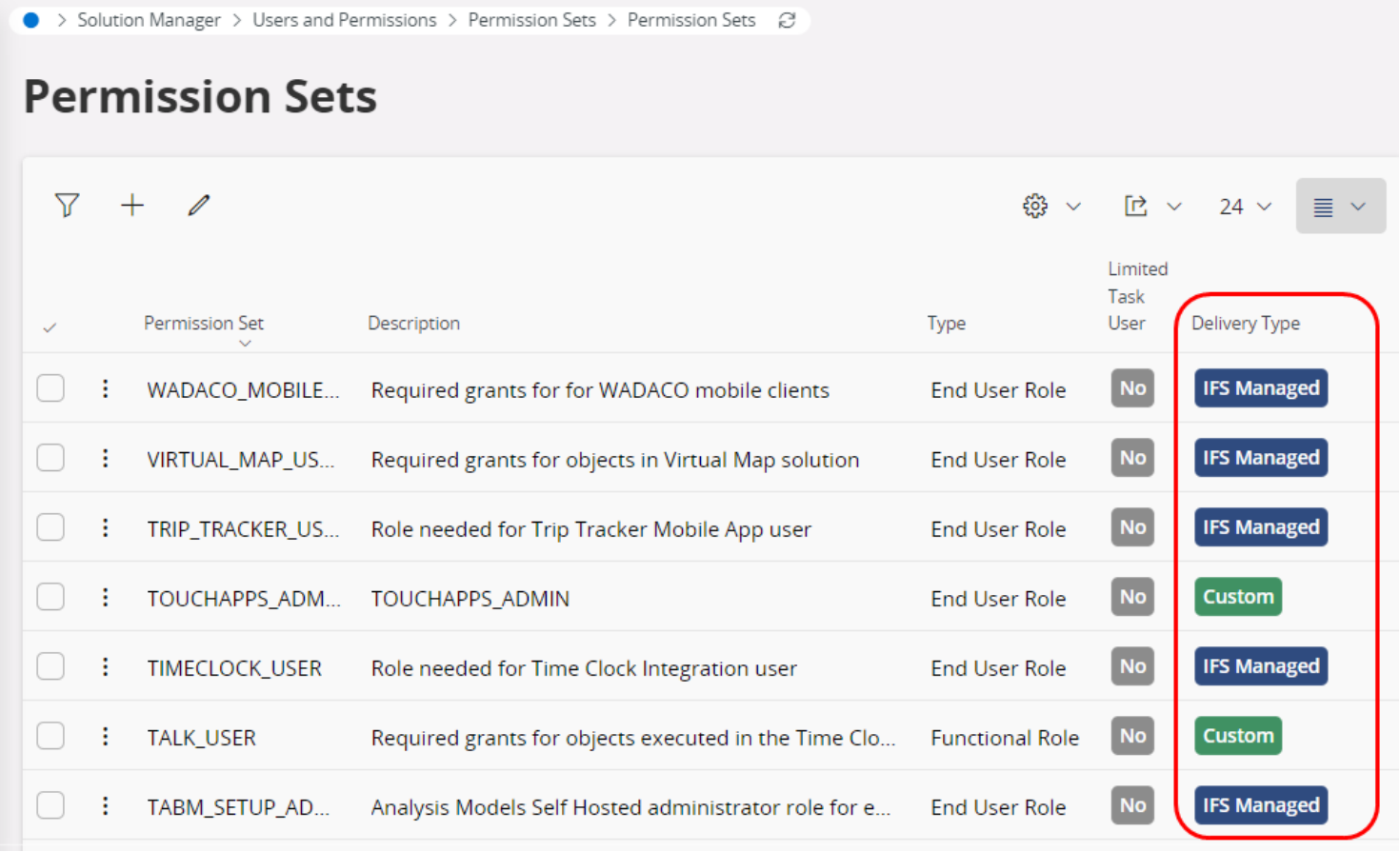
The IFS Permission Sets framework provides a flexible mechanism for managing access control in IFS Cloud. It enables administrators to tailor permissions for the unique requirements of individual users or groups within your organization.

Setting up the permission set for an organization is a time-consuming task. Hence, IFS deliver a set of IFS Managed permission sets ready to use. Since IFS manage those permission sets, there is much less maintenance needed by customers.

In 24R1, the tooling and process for managing permission sets are improved.

IFS Managed Permission Sets for easy User Access Management

Concept



IFS Managed Permission Sets for easy User Access Management

Benefits

- IFS Managed permission sets will save time on the initial set up.
- Customers can efficiently utilize them to enhance operational effectiveness.
- Decreased maintenance efforts will ensure smoother ongoing operations.

IFS Managed Permission Sets for easy User Access Management

Solution

Permission Set Delivery Types are used to differentiate IFS predefined permission sets from others. There are 3 delivery types – I**FS Managed Base**, **IFS Managed**, and **Custom**.

I**FS Managed Base** - These are the base permission sets which are delivered and maintained by IFS Frameworks. They are used to handle general authorization and are also allowed to grant to LTU permission sets.

IFS Managed - These are IFS standard permission sets that are delivered and maintained by IFS. These permission sets cover specific business flows.

Custom - These are all the permission sets that are created in the application by the customer. The entire life cycle of these permission sets can be managed through Solution Manager.

Only Custom Delivery Type permission sets are allowed to be created and modified in Solution Manager.

IFS

IFS Managed Permission Sets for easy User Access Management : Duplicate Permission Sets

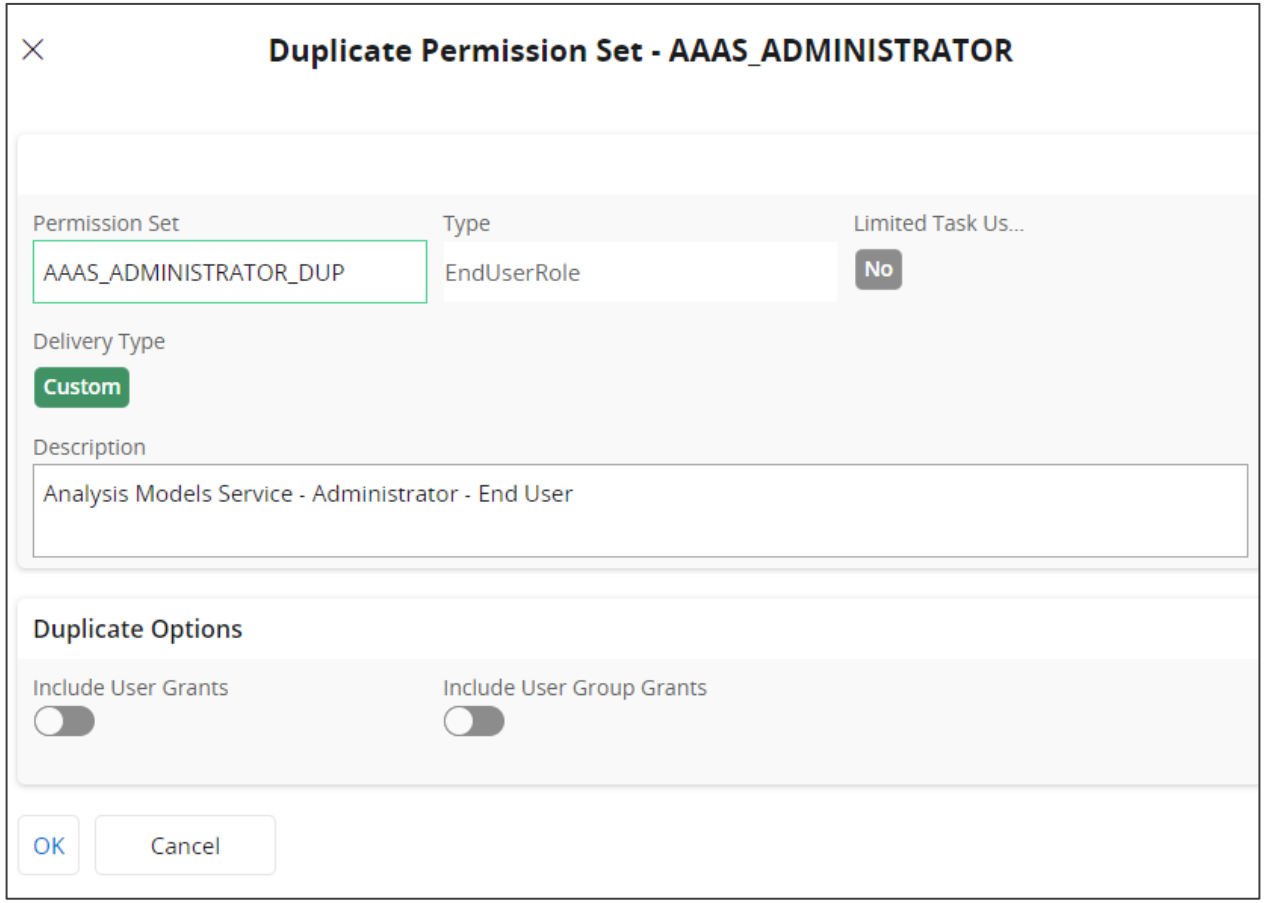
IFS Managed Permission Sets for easy User Access Management - Duplicate Permission Sets

Background

IFS Managed permission sets provide access to a defined flow. Optionally, you can duplicate and customize those permission sets to provide fine-grained access to users according to your organization’s needs. The duplicate option is not limited to IFS Managed permission sets.

IFS Managed Permission Sets for easy User Access Management - Duplicate Permission Sets

Concept



IFS Managed Permission Sets for easy User Access Management - Duplicate Permission Sets

Benefits

- Less time for creating a new permission set that should be similar to another
- Duplicate and modify grants in IFS Managed permission sets

IFS Managed Permission Sets for easy User Access Management - Duplicate Permission Sets

Solution

With this solution the entire permission set can now be duplicated. It also provides an option to have same users and user groups granted the new permission set.

IFS Managed Permission Sets for easy User Access Management : Compare Permission Sets

IFS Managed Permission Sets for easy User Access Management - Compare Permission Sets

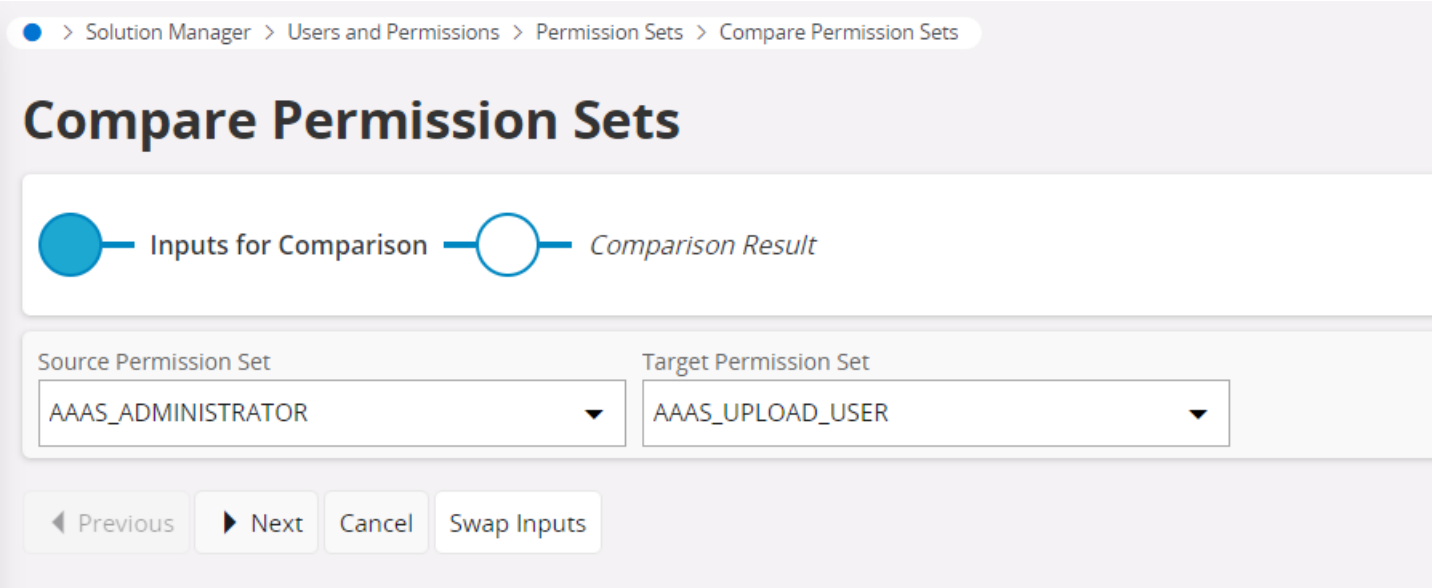
Background

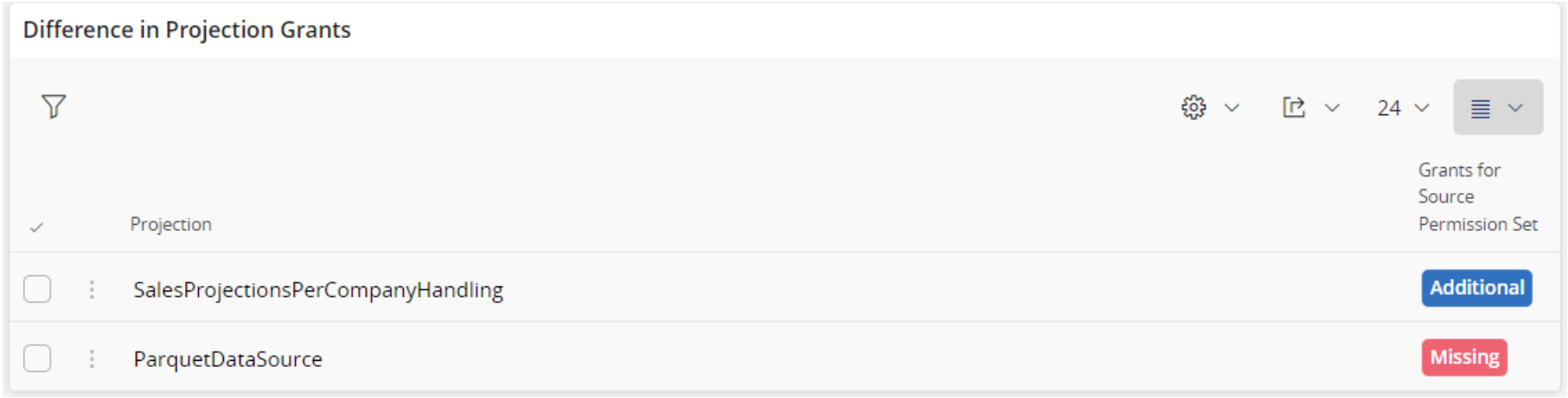
For any IFS Cloud Administrator or Developer, there is a requirement to compare Permission Sets to determine if there are any differences.

This will help when there is a new version of an IFS Managed permission sets, when updating to a new IFS Cloud release, to compare the new version with any copies made.

IFS Managed Permission Sets for easy User Access Management - Compare Permission Sets

Concept





IFS Managed Permission Sets for easy User Access Management - Compare Permission Sets

Benefits

- Straightforward way to compare two permission sets in the Application.
- Once the comparison is made, the appropriate action can be taken to either replace or merge the permission sets based on the results obtained.

IFS Managed Permission Sets for easy User Access Management - Compare Permission Sets

Solution

Two permissions sets can be compared and the options to replace and(or) merge are provided after comparing.

When comparing, all items in the permission sets are considered, such as Projections, Projection Entities, Projection Entity Actions, Projection Actions, Workflows, Lobbies, Background Jobs.

IFS Managed Permission Sets for easy User Access Management : Import Permission Sets using IFS Installer

IFS Managed Permission Sets for easy User Access Management - Import Permission Sets using IFS Installer

Background

If you prefer not to import Permission Sets manually through Solution Manager, you can use IFS Cloud Installer to import them through a delivery.

IFS Managed Permission Sets for easy User Access Management - Import Permission Sets using IFS Installer

Benefits

- Eliminates the need for manual work, saving time and reducing the risk of errors during the import process.
- Simplifies the go-live process by automating permission set import, ensuring a smoother transition.
- Allows for proper source control of permission sets, facilitating version tracking and easier rollback if necessary.
- When dealing with existing permission sets, the installer use the "Replace" option, preventing unintended modifications.
- In case of errors during import for a specific permission set, the installer logs the error and proceeds with importing the next permission set, maximizing efficiency.

IFS Managed Permission Sets for easy User Access Management - Import Permission Sets using IFS Installer

Solution

By adding the permission sets to *Server / Permissions* folder in a delivery, the installer will import your permission sets.

When working with existing permission sets, the installer will only consider the **Replace** option. If there are any errors in the file or import for a Permission Set, the installer will log the error and continue to the next Permission Set.

Arcwide
Accelerating business value with IFS Cloud

Q&A / Discussion

Summary / Closing

Summary / Closing

- **IFS doesn't come with its own methodology** for roles & permissions – but we have highlighted a possible **two-layer approach**
- We hope that you were able to get some **new insights and ideas**
- Jafar will be at IFS Connect in Germany. Martin will be at IFS Connect in Stockholm. Let's meet at these events!
- The next webinar is scheduled to take place on **26 June** at the same time. Invites will be sent out shortly.
- The topic is **Example Structure of Functional and End User Roles & AD Integration**
- 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

Martin Brogli
+41 79 355 85 16
martin.brogli@2bcs.ch

Jafar Sabadia
+41 78 767 53 66
jafar.sabadia@2bcs.ch

2BCS AG
Unterrietstrasse 2a
CH-8152 Glattbrugg
Switzerland

T +41 43 233 79 78
www.2bcs.ch

Purple Services GmbH
Untere Rebrainstrasse 7
CH-9213 Hauptwil
Switzerland

T +41 71 552 52 55
www.purple-services.ch