PURPLE SERVICES

2BCS

IFS Permissions Webinar

Webinar 3: Example Structure of Functional and End User Roles

26 June 2025

Dr. Martin Brogli
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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

	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

What is the IFS Permissions Manager

The IPM is the most advanced Roles & Permissions tool which supports customers in their day-to-day access management activities, in reporting, and in transitioning to IFS Cloud

Technical background

- The IPM is a web-based tool that connects to a customer's IFS environment
- The tool is a front-end that presents and enables changes to the roles & permissions in IFS
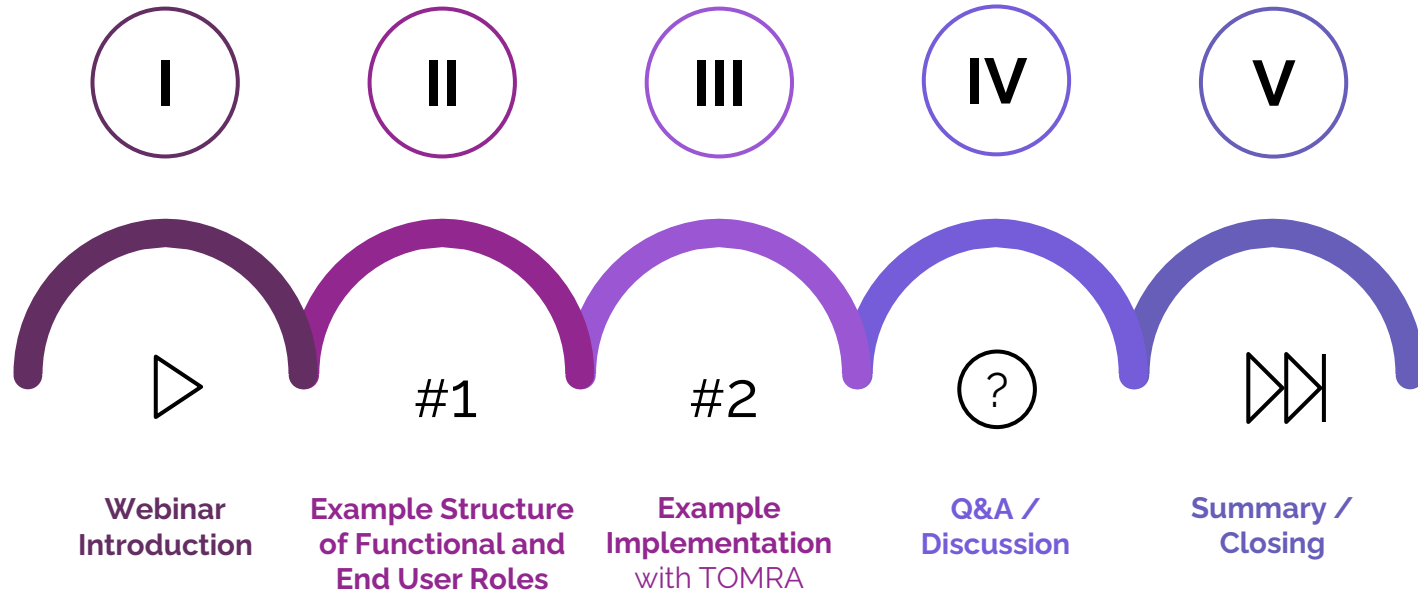- The IPM does not have its own data

Benefits

- Efficiency gains of 45% for routine tasks
- Acceleration of the initial set-up and testing due to templates
- Predefined reports for internal & external auditors
- Major reduction of effort when converting from IFS Apps 10 to IFS Cloud

Use Cases

- Simplifies the day-to-day management of a company's IFS users, roles and permissions incl. reporting on access management
- Has best practice templates which ease the initial set-up of roles and permissions
- Can convert IFS Apps 10 to IFS Cloud roles and permissions

Services associated with IPM

- Technical set-up connecting tool to IFS
- Business training on method and best practice
- Hands-on support optimizing customers set-up
- Audit services
- Technical services completing the conversion
- Bi-monthly webinars and knowledge center

Agenda

I — II — III — IV — V

▷
Webinar Introduction

#1
Example Structure of Functional and End User Roles

#2
Example Implementation with TOMRA

?
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
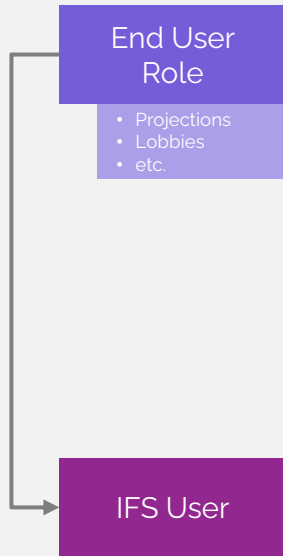on the webinar website

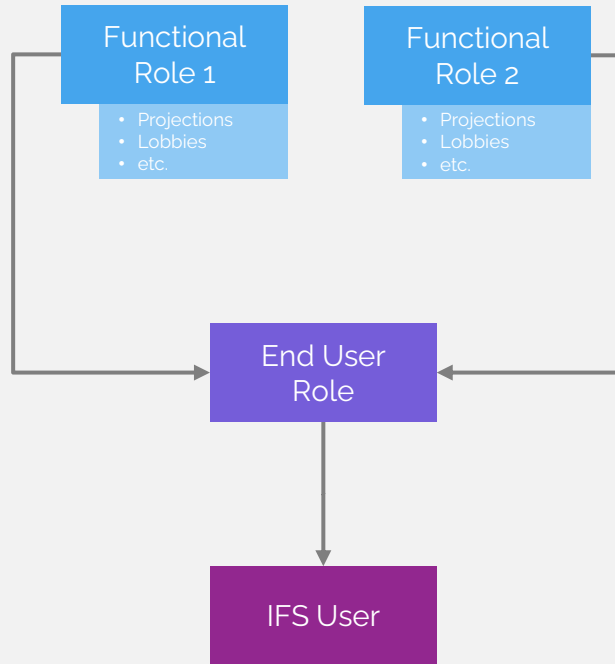# Example Structure of Functional and End User Roles

Topic 1

Example Structure of Functional and End User Roles

#	Topic
1	Webinar 3 (Methodology) Recap
2	Sales Example: Structure Principles
3	End User Roles
4	Functional Roles
5	End User Roles to Functional Roles Matrix
6	Summary

Single Layer

End User Role
- Projections
- Lobbies
- etc.

IFS User

Two Layers

Functional Role 1
- Projections
- Lobbies
- etc.

Functional Role 2
- Projections
- Lobbies
- etc.

End User Role

IFS User

Multiple Layers / Nested

Functional Role 1
- Projections
- Lobbies
- etc.

Functional Role 2
- Projections
- Lobbies
- etc.

End User Role 2
- Projections
- Lobbies
- etc.

End User Role 1
- Projections
- Lobbies
- etc.

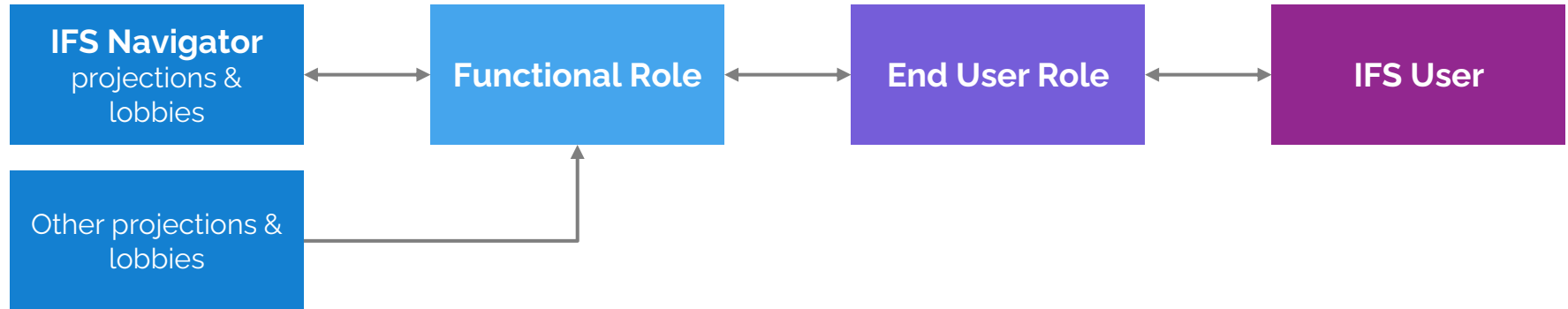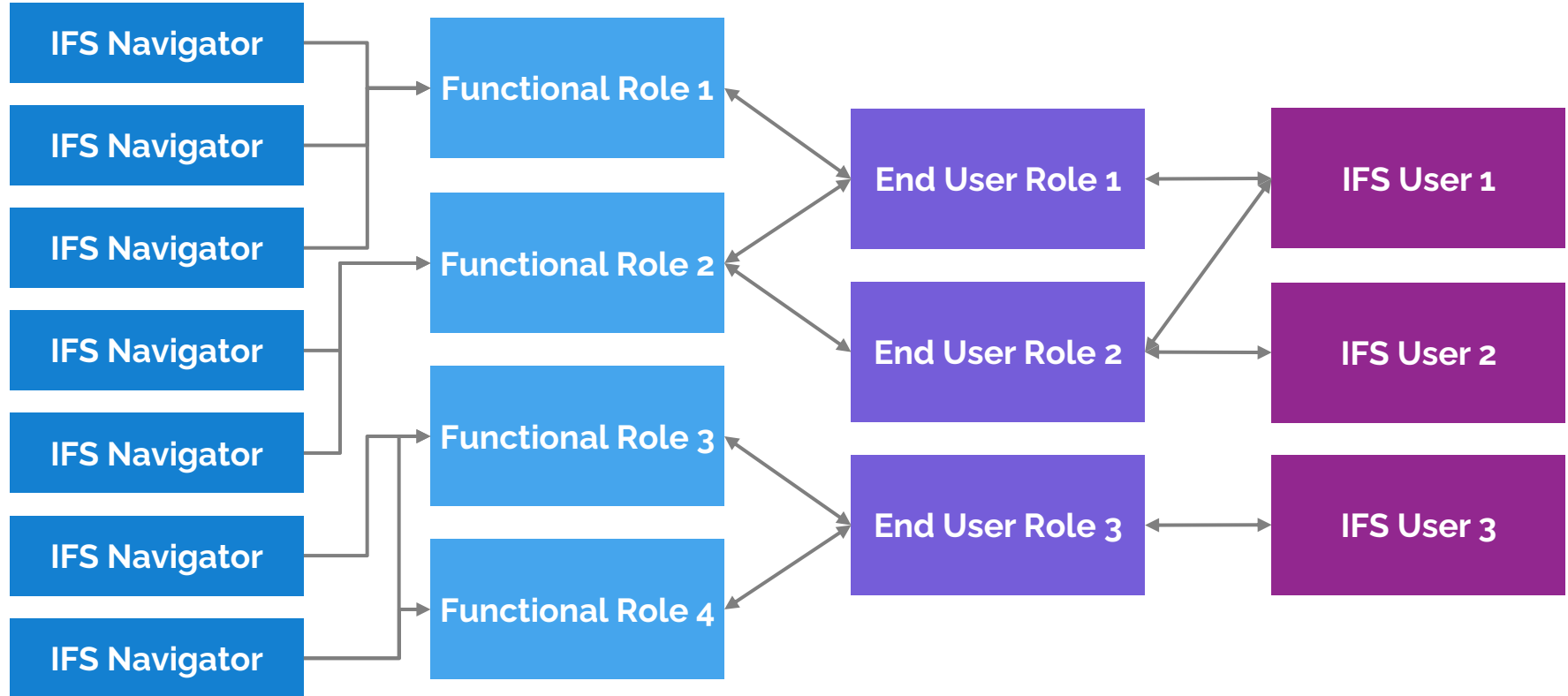IFS User
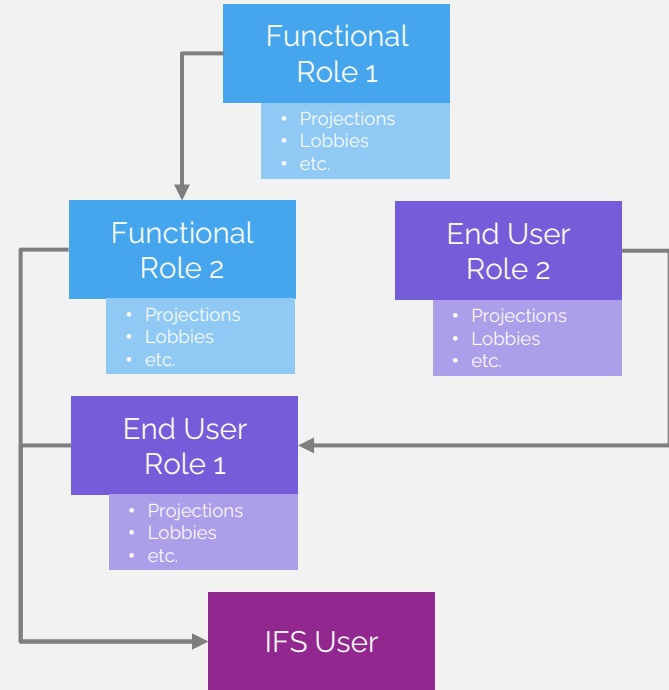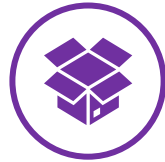
1) Webinar 3 (Methodology) Recap

Two-layer model

Re-use(able) Functional Roles

End User Roles = complete standalone roles

Sales example: distinction between business and data focused End User Roles

- **Business:** Focus on transactions, visibility, and management

- **Data:** Focus on master/basic data creation and maintenance

Business Focus	**Sales Director**	basic IFS permissions, access to **sales** (without any basic/master data), certain areas in **procurement**, **GL** read only access in **finance**, **AR** read only access, specific **lobbies, manager services**
	Sales Manager	basic IFS permissions, access to **sales** (without any basic/master data), certain areas in **procurement**, **sales-related** read only access in **finance** (including **AR**)
Data Focus	**Master Data**	basic IFS permissions, read & write access to sales-related **master data** (customer, contact, price lists, credit management, customer agreements)
	Basic Data	basic IFS permissions, read & write access to sales-related **basic data**)

3) End User Roles – Detailed View

Topic / Role	Sales Director EU_SLS_DIRECTOR	Sales Manager EU_SLS_MANAGER	Sales Master Data EU_SLS_MDA	Sales Basic Data EU_SLS_BDA
Basic IFS Permissions	✓	✓	✓	✓
Sales (no master/basic data)	✓	✓		
Finance: Sales-related		✓		
Finance: GL	✓			
Purchase Requisitions	✓	✓		
Purchase Orders	✓	✓		
Sales Director Lobbies	✓			
Sales Master Data			✓	
Sales Basic Data				✓
Manager Services	✓			

4) Functional Roles – Overview

Topic	Functional Roles needed
Basic IFS Permissions	Basic Permission Set
Sales (no master/basic data)	Sales: No Master/Basic Data Read & Write
Finance: Sales-related	Accounts Receivable Read Only, Customer Credit Management Read Only, Customer Invoice Read Only, Fixed Assets Read Only, Supplier Invoice Read Only
Finance: GL	General Ledger Read Only
Purchase Requisitions	Purchase Requisition Read & Write
Purchase Orders	Purchase Order Read & Write
Sales Director Lobbies	Lobbies for Sales Director (custom)
Sales Master Data	Sales Master Data Read & Write, Sales Master Data Read Only
Sales Basic Data	Sales Basic Data Read & Write, Sales Basic Data Read Only
Manager Services	Manager Services

4) Functional Roles – Detailed View

Functional Roles	Domain	Permission Set Name	IFS Navigator Contents
Basic Permission Set	General	FR_IFS_BASIC	Document Management, HCM Self-Service, Procurement Self-Service
Sales: No Master/Basic Data Read & Write	Sales	FR_SLS_SALES_NO_MDA_BDA_RW	Sales (excluding master/basic data)
Accounts Receivable Read Only	Finance	FR_FIN_AR_RO	Accounts Receivable
Customer Credit Management Read Only	Finance	FR_FIN_CUST_CREDIT_MGT_RO	Customer Credit Management
Customer Invoice Read Only	Finance	FR_FIN_CUST_INV_RO	Customer Invoice
Fixed Assets Read Only	Finance	FR_FIN_FIXED_ASSETS_RO	Fixed Assets
Supplier Invoice Read Only	Finance	FR_FIN_SUPP_INV_RO	Supplier Invoice
General Ledger Read Only	Finance	FR_FIN_GL_RO	General Ledger
Purchase Requisition Read & Write	Procurement	FR_PRC_PUR_REQ_RW	Requisition
Purchase Order Read & Write	Procurement	FR_PRC_PUR_ORDER_RW	Order (Procurement)
Lobbies for Sales Director	Lobby	FR_SLS_LOBBY_DIRECTOR	
Sales Master Data Read & Write	Sales	FR_SLS_SALES_MDA_RW	Customer, Contact, Price Lists, Customer Credit Management, Customer Agreement
Sales Master Data Read Only	Sales	FR_SLS_SALES_MDA_RO	Customer, Contact, Price Lists, Customer Credit Management, Customer Agreement
Sales Basic Data Read & Write	Sales	FR_SLS_SALES_BDA_RW	Sales Basic Data
Sales Basic Data Read Only	Sales	FR_SLS_SALES_BDA_RO	Sales Basic Data
Manager Services	HCM	FR_HR_MGR_SERVICES	Manager Services

5) End User Roles to Functional Roles Matrix

Permission Set Name	Sales Director EU_SLS_DIRECTOR	Sales Manager EU_SLS_MANAGER	Sales Master Data EU_SLS_MDA	Sales Basic Data EU_SLS_BDA
FR_IFS_BASIC	✓	✓	✓	✓
FR_SLS_SALES_NO_MDA_BDA_RW	✓	✓		
FR_FIN_AR_RO	✓	✓		
FR_FIN_CUST_CREDIT_MGT_RO		✓		
FR_FIN_CUST_INV_RO		✓		
FR_FIN_FIXED_ASSETS_RO		✓		
FR_FIN_SUPP_INV_RO		✓		
FR_FIN_GL_RO	✓			
FR_PRC_PUR_REQ_RW	✓	✓		
FR_PRC_PUR_ORDER_RW	✓	✓		
FR_SLS_LOBBY_DIRECTOR	✓			
FR_SLS_SALES_MDA_RW			✓	
FR_SLS_SALES_MDA_RO	✓	✓		
FR_SLS_SALES_BDA_RW				✓
FR_SLS_SALES_BDA_RO	✓	✓		
FR_HR_MGR_SERVICES	✓			

Clear separation of business vs. data responsibilities
Distinct End User Roles reduce overlap and clarify accountability

Modular Functional Roles reused across End User Roles
Increases consistency and efficiency (also across areas)

End User Roles are standalone
No stacking or mixing required at user level required (but possible)

Functional Roles mapped to navigator elements, not org units
Example: finance-related access split by function (AR, GL, etc.), not by department

Naming convention supports transparency
Prefixes (EU_, FR_) and domain-based suffixes make role intent immediately clear

Actual Implementation at TOMRA

Topic 2

Implementation of permission manager from 2BCS at Tomra Recycling – Mining

Luc Maystadt

Agenda

Introduction

Set-up we used
In practice

Tomra group has 3 divisions

- Collection (reverse vending machine)

- Food

- Recycling – Mining

We are talking about Recycling – Mining,

We will go live in 5 days from now with +/- 1100 users on 14 sites
- 2 production sites
- 12 Sales and service sites

We used the permission manager provided by 2BCS to manage the permissions

Agenda

Introduction

Set-up we used
In practice

There are basically 3 types of permission sets

- **Functional permission** sets which are used to grant access to single functions (for example creating reading and updating manual vouchers)
Those functional permission set cannot be allocated directly to a user

- **End user role** can contain functional permission sets, end user roles and direct access to projections,…
They can be allocated to users!

- **IFS managed permission sets** which can not be changed and can be of both type mentioned above

➔ We are using the 2-step approach as proposed by 2BCS

- EU_xxxx name of an end-user role (for example EU_FIN_AR)

- FC_XXXX name of functional permission set, which grant direct access to projections, lobbies, reports,…
FC_GL_MANV for example allowing to manage manual vouchers

- We also reuse the standard permission sets delivered by IFS.
They don't follow our naming convention.
They are easily recognizable as none of them starts with EU_ or FC_

We have about 70 end user roles

We have about 200 functional permission sets

TOMRA

Agenda

Introduction

Set-up we used
In practice

Practical example

EU_FIN_AR_CLERK	grant access to the role account receivable
FC_GL_BASIC	allows to access some basic functions to be able to make postings
FC_GL_EINVOICE	allow to monitor einvoicing
FC_WHSE_APPRO_COUNTLINE	allows to view and approve unconfirmed counting lines
FC_WHSE_INTRTAT	allows to generate Intrastat report
FC_SLS_ORDER_MGT	Allow to manage order and quotes
FC_GL_ACC_MATCHING	allow to handle unmacht accounts
FC_FIN_CUST_INV	creation and managing cutomer invoice
FC_CM_CASH_BOOK	allows to manage cash functions
FC_FIN_LOBBY	allow to access Lobbies relevant for finance
FC_CM_MIXED_PAY	allow to make mixed payments
FC_AR_REMINDER	allow to make reminders dunning letter and customer statements

TOMRA

Agenda

Introduction

**Set-up we used
In practice**

	EU_ENG_TECH_WRITER	EU_FIN_AP_CLERK	EU_FIN_AR_CLERK	EU_FIN_CM_CLERK	EU_FIN_CTRL	EU_FIN_FA_CLERK	EU_FIN_MANAGER	EU_FIN_MANV	EU_FIN_PAY	EU_FIN_REPORT	EU_HCM_CARD	EU_HCM_EMP_TA	EU_HCM_MAN_TA	EU_HCM_PAYROLL	EU_IFS_ADMIN_TEMP	EU_ISM_DMS_ADMIN	EU_ISM_DOCMGT	EU_ISM_ENGINEERING	EU_ISM_FINANCE	EU_ISM_PROCUREMENT	EU_ISM_REPORTING	EU_ISM_SALES
FC_FA_MANAGEMENT						✓	✓															
FC_FIN_CURRENCY																						
FC_FIN_CUST_INV			✓				✓			✓												
FC_FIN_GEL_REPORT							✓			✓												
FC_FIN_LOBBY		✓	✓	✓	✓	✓	✓	✓	✓													
FC_FIN_PERIODIC_ROUTINES							✓			✓												
FC_FIN_PROJECT		✓								✓												
FC_FIN_QUICKREPORTS		✓	✓	✓	✓	✓	✓	✓	✓	✓												
FC_FIN_SUPPL_REP		✓																				
FC_FIN_TAGETIK					✓		✓			✓												
FC_GL_ACC_MATCHING		✓	✓				✓			✓												
FC_GL_ADVANCED							✓	✓		✓												
FC_GL_APPROVE_VO							✓	✓		✓												
FC_GL_BASIC		✓	✓	✓		✓	✓	✓		✓												
FC_GL_BASIC_DATA																			✓			
FC_GL_BASIC_RO				✓																		
FC_GL_EINVOICE		✓	✓				✓			✓												
FC_HCM_CARD											✓											
FC_HCM_PERSON														✓								
FC_HCM_QUICKREPORTS														✓								

TOMRA

Agenda

Introduction

**Set-up we used
In practice**

Agenda

Introduction

**Set-up we used
In practice**

	A	B	C	D	E	F	G
1	UserName	First Name	Last Name	Complete Name	User Creation Date	Status	End-User role
2	MLITWIN	Marcin	Litwin	Marcin Litwin	2025-02-06	TRUE	PROD_CONSULTANT
3	KWIACEK	Krzssztof	Wiacek	Krzssztof Wiacek	2024-10-09	TRUE	PROD_CONSULTANT
4	KSZROMBA	Krzyszto	Szromba	Krzyszto Szromba	2024-10-09	TRUE	PROD_CONSULTANT
5	CNC_TOMRAPEOPLE	CNC_TOMRAPEOPLE		CNC_TOMRAPEOPLE	2025-02-03	TRUE	
6	DSCHMID	David	Schmid	David Schmid	2025-02-06	TRUE	EU_HCM_EMP_TA
7	DSCHMID	David	Schmid	David Schmid	2025-02-06	TRUE	EU_HCM_MAN_TA
8	DSCHMID	David	Schmid	David Schmid	2025-02-06	TRUE	EU_ENG_RD_ENG
9	DSCHMID	David	Schmid	David Schmid	2025-02-06	TRUE	EU_ALL_USER
10	ADLAMINI	Andile	Dlamini	Andile Dlamini	2025-02-06	TRUE	EU_HCM_MAN_TA
11	ADLAMINI	Andile	Dlamini	Andile Dlamini	2025-02-06	TRUE	EU_HCM_EMP_TA
12	ADLAMINI	Andile	Dlamini	Andile Dlamini	2025-02-06	TRUE	EU_PM_STD
13	ADLAMINI	Andile	Dlamini	Andile Dlamini	2025-02-06	TRUE	EU_ALL_USER
14	HDOHR	Heike	Döhr	Heike Döhr	2025-02-06	TRUE	EU_FIN_AP_CLERK
15	HDOHR	Heike	Döhr	Heike Döhr	2025-02-06	TRUE	EU_ALL_USER
16	HDOHR	Heike	Döhr	Heike Döhr	2025-02-06	TRUE	EU_HCM_EMP_TA
17	HDOHR	Heike	Döhr	Heike Döhr	2025-02-06	TRUE	EU_FIN_MANV
18	KDOMBDERA	Kerstin	Dombdera	Kerstin Dombdera	2025-02-06	TRUE	EU_HCM_EMP_TA
19	KDOMBDERA	Kerstin	Dombdera	Kerstin Dombdera	2025-02-06	TRUE	EU_FIN_CTRL
20	KDOMBDERA	Kerstin	Dombdera	Kerstin Dombdera	2025-02-06	TRUE	EU_ALL_USER
21	MDORN	Moritz	Dorn	Moritz Dorn	2025-02-06	TRUE	EU_ALL_USER
22	MDORN	Moritz	Dorn	Moritz Dorn	2025-02-06	TRUE	EU_ENG_RD_ENG
23	MDORN	Moritz	Dorn	Moritz Dorn	2025-02-06	TRUE	EU_HCM_EMP_TA
24	LDREXEL	Lucas	Drexel	Lucas Drexel	2025-02-06	TRUE	EU_HCM_EMP_TA
25	LDREXEL	Lucas	Drexel	s Drexel	2025-02-06	TRUE	EU_ALL_USER
26	LDREXEL	Lucas	Drexel	Lucas Drexel	2025-02-06	TRUE	EU_SERV_TECHNICIAN
27	ODRONOV	Oleksandr	Dronov	Oleksandr Dronov	2025-02-06	TRUE	TRM_TIME_ATTENDANCE

	A	B
343	MKOCHKRAJCOVICOVA	
344	SSAREMYPOUR	
345	TGRAEFF	
346	USCHRODER	
347	⊟ EU_ISM_DMS_ADMIN	
348	MSEBO	
349	⊟ EU_ISM_DOCMGT	
350	MSEBO	
351	⊟ EU_ISM_ENGINEERING	
352	CCREMER	
353	MSEBO	
354	⊟ EU_ISM_FINANCE	
355	KBRUNCAKOVA	
356	SGEORGES	
357	⊟ EU_ISM_PROCUREMENT	
358	JKORISTOVA	
359	⊟ EU_ISM_REPORTING	
360	DPANCRAZI	
361	LMAYSTADT	
362	TBUSS	
363	TKORN	
364	⊟ EU_ISM_SERVICE	
365	SKHAN	
366	⊟ EU_ISM_USER_PERMISSION	

4	⊟ AALMUSA
5	EU_ALL_USER
6	EU_SERV_TECHNICIAN
7	⊟ AALVAREZ
8	EU_ALL_USER
9	EU_SERV_ADMIN
10	EU_SERV_TECHNICIAN
11	⊟ AAPRINCE
12	EU_ALL_USER
13	EU_CPM_PROJECTM
14	EU_HCM_EMP_TA
15	EU_SERV_ADMIN
16	EU_SLS_INSIDE
17	EU_TIMECLOCK
18	⊟ ABAAK
19	EU_ALL_USER
20	EU_ENG_RD_ENG
21	EU_HCM_EMP_TA
22	⊟ ABEREDA
23	PROD_CONSULTANT
24	⊟ ABETANE
25	EU_ALL_USER
26	EU_HCM_EMP_TA
27	EU_SERV_ADMIN
28	⊟ ABHARGAVA
29	EU_ALL_USER
30	EU_SLS_SALEP
31	⊟ ABOGUSZ
32	EU_ALL_USER
33	EU_HCM_EMP_TA
34	EU_HCM_MAN_TA

Q&A / Discussion

Summary / Closing

- We explored how to apply a **two-layer model** using clearly defined, **standalone End User Roles** and **modular, reusable Functional Roles**

- The **Sales example** demonstrated how to structure roles with a clear distinction between **business-focused and data-focused** responsibilities, supported by consistent naming and traceable mappings

- We hope that you were able to get some **new insights and ideas**

- The next webinar is scheduled to take place on **28 August** at the same time. Invites will be sent out shortly

- The topic is **Permissions Testing Best Practice & Environment Management**

- 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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