



IFS Permissions Webinar

Webinar 4: Permissions Testing
Best Practice & Environment
Management

28 August 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

Languages

German mother tongue
English mother tongue
French business fluent

Education

University of St. Gallen, focus on business information management
Doctorate at the University of St. Gallen

Academic title

Dr. oec. HSG

Expertise

Industries: machinery, engineering, building, pharma, chemicals and cosmetics
Services: Application strategies, implementation and change management

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

Languages

German mother tongue
English mother tongue
Arabic mother tongue
French fluent

Education

University of St. Gallen, Master in
Business Innovation

Academic title

M.A. Business Innovation HSG

Expertise

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

Career

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





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



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

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

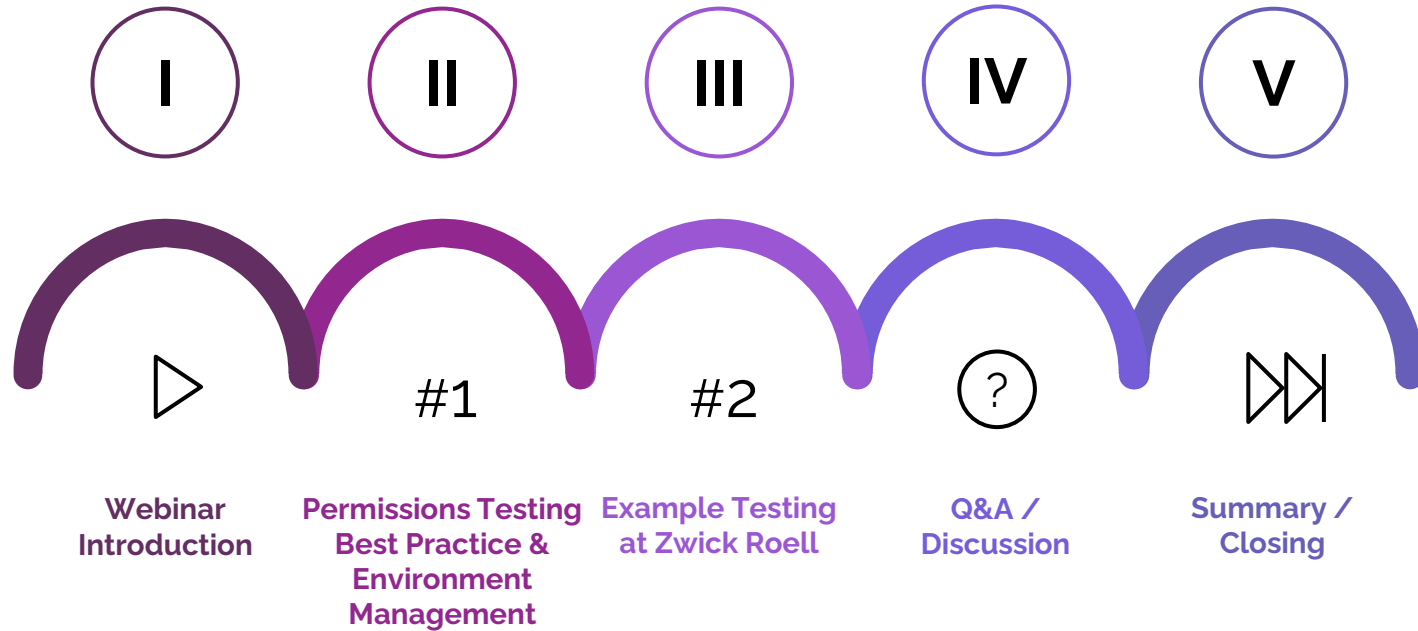
- Efficiency gains of 45% for routine tasks
- Acceleration of the initial set-up and testing due to templates
- Predefined reports for internal & external auditors
- Major reduction of effort when converting from IFS Apps 10 to IFS Cloud

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



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 Testing Best Practice & Environment Management

Topic 1



#	Topic
1	Webinar 3 (Example Structure) Recap
2	Permissions Testing Best Practice
3	Environment Management
4	Summary



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



1. Role Definition

Define roles with process responsables



2. Pre-Testing

Validate roles quickly with dummy users



3. Integration Testing



Test real processes using actual roles in cycles



4. Go-Live

Deploy stable roles to production

1) Role Definition

- Initial definition with project management and solution architects
- Further discussion and refinement with “permissions responsible” per process stream (process owner, key user)

2) Setup in IFS

- Initial role setup in IFS, ideally using pre-existing roles (Functional and/or End User Roles)
- An existing library of tried and tested Functional Roles can make the setup a lot easier, even if End User Roles don't apply 1:1
- Refer to role structure best practice (see previous webinar, summary on next slide)



Two-layer model



Re-use(able) Functional Roles

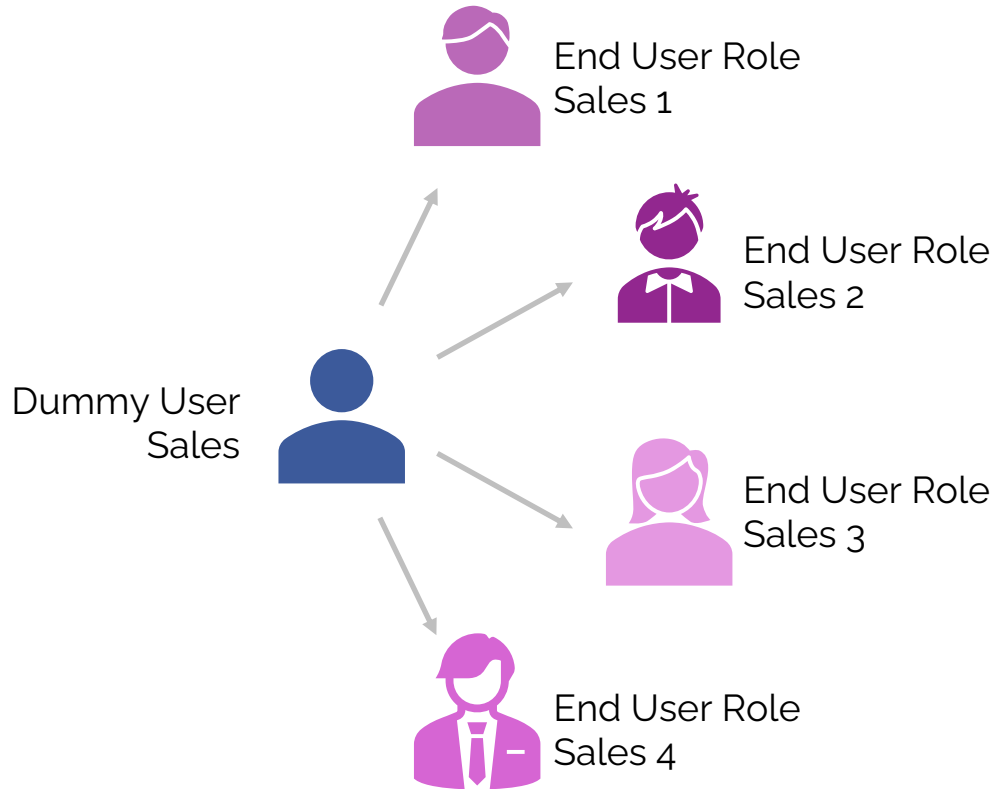


End User Roles = complete standalone roles

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

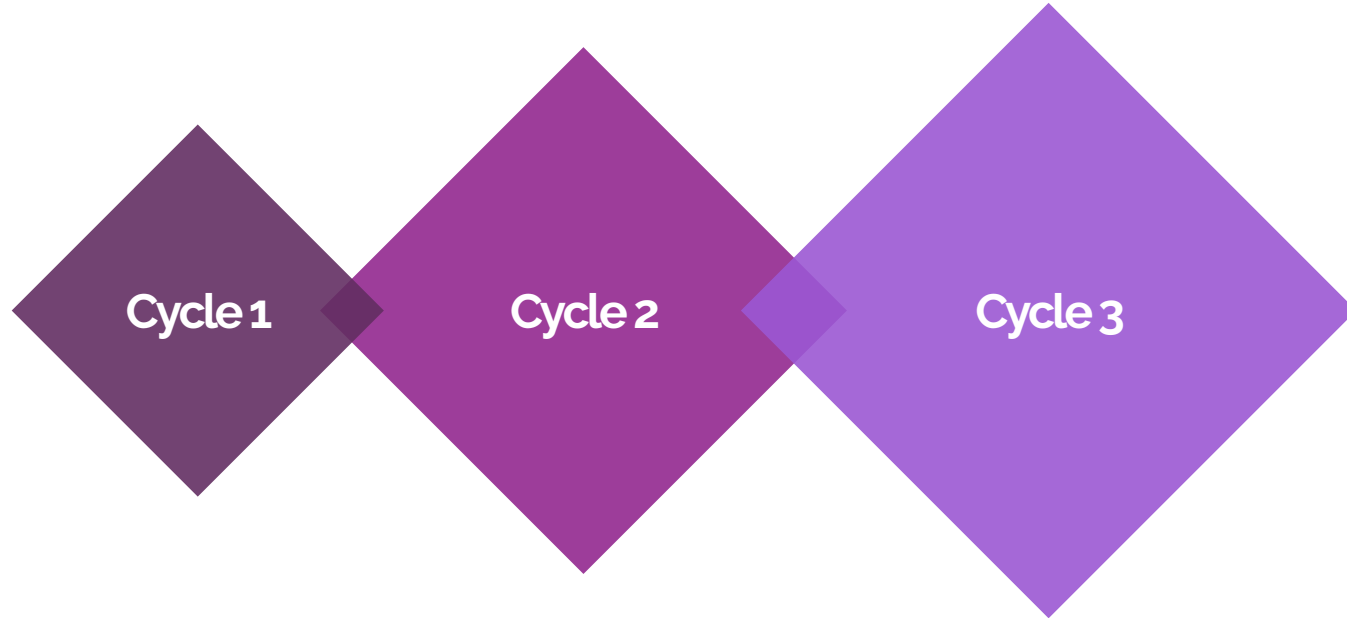
- **Business:** Focus on transactions, visibility, and management
- **Data:** Focus on master/basic data creation and maintenance

2) Testing: Pre-Testing with Dummy Users & Fixes



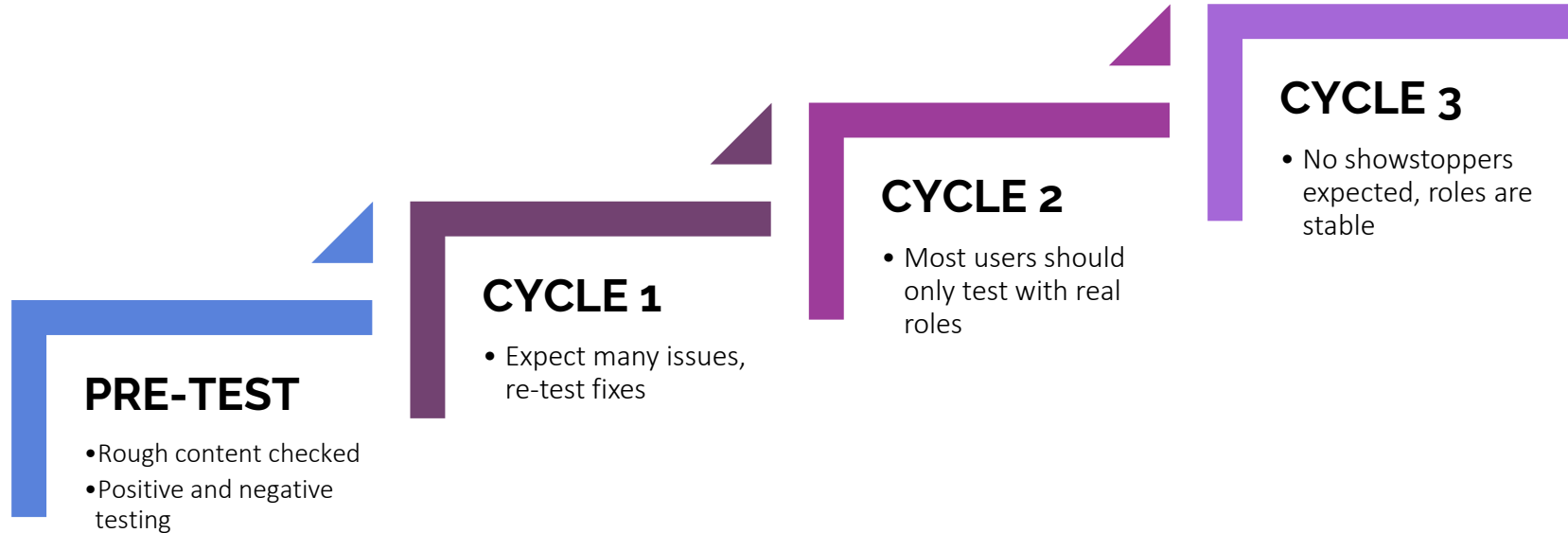
- One dummy user per process stream (e.g. Sales, Procurement, Finance)
- Permissions responsible assigns/reassigns roles to dummy, tests, and documents issues
- Issues corrected in CFG; optional 2nd round if large gaps are found

Goal: Ensure what the tester sees roughly matches expectations – not full detail yet

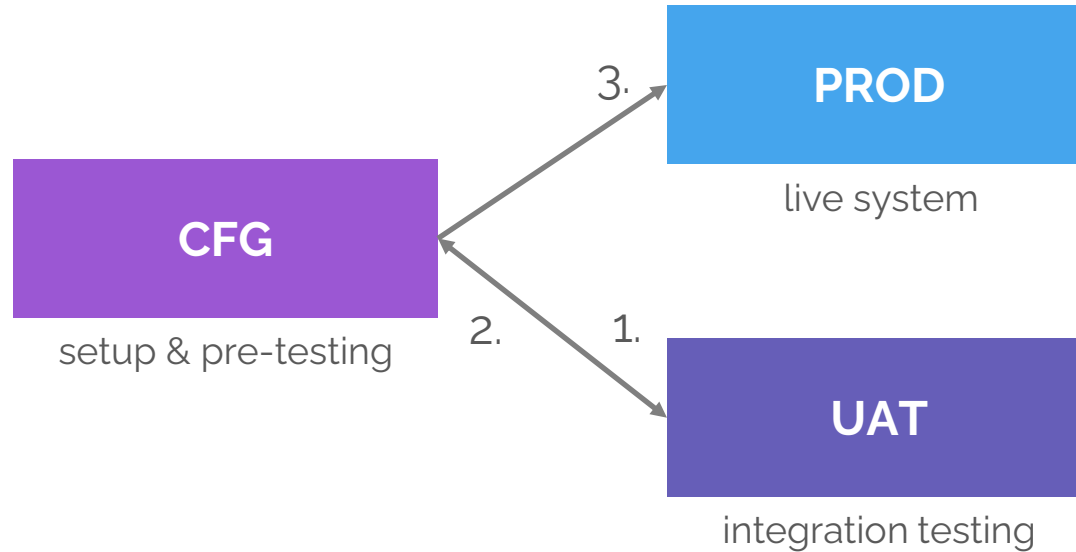


- Ideally the project planning includes multiple cycles of integration testing (E2E processes)
- The goal is for testers to use their actual roles instead of full access
- If a showstopper arises:
 - Quick fix if possible (adjust EUR/FR, add projection/lobby)
 - If not → grant full access temporarily, document issue for later fix

2) Testing: Phased Maturity of Roles



3) Environment Management: Environment Management Flow



1. Export/import roles between CFG & UAT
2. Consolidate corrections back into CFG
3. Final export from CFG to PROD before go-live



Align role definition with process responsables



Use dummy users for efficient pre-tests



Gradually phase out full access by integration testing cycle 2



Always re-test fixed issues before next cycle



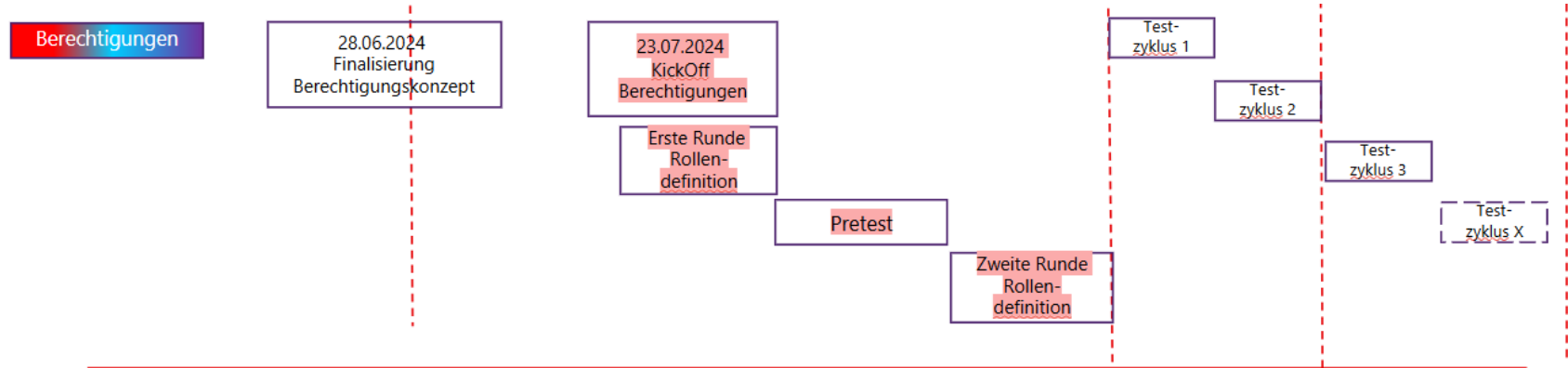
Keep CFG as the “master” for corrections, not UAT



Consolidate fixes after each test cycle back into CFG

Example Testing at Zwick Roell

Topic 2



1. General permissions concept and role definition
2. Pretesting
3. Second round role definition
4. Integration testing
5. Go-Live (pending)

ZR_IFS_Permissions_Konzept

9 Testing

9.1 Negative Tests

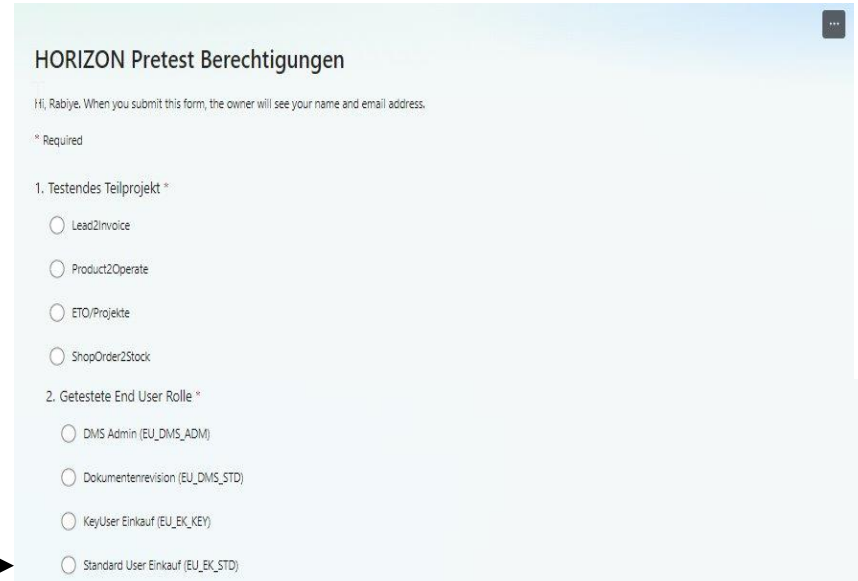
Negative Tests werden frühestens während des CST3 durchgeführt. Die spezifischen Testfälle werden von den POs und 2BCS nach CST2 vorbereitet. Die folgenden Inputs werden für die Erstellung der Testfälle verwendet:

- Interviews mit POs
- Anforderungen an sensible Daten (ZR-Management, HR, Finanzen)
- rechtliche Aspekte
- sich gegenseitig ausschließende Berechtigungen ("segregation of duties")

9.2 Positive Tests

Positive Tests werden im Rahmen der regulären CST-Testzyklen erfasst.

- Duration of 3 weeks in total
- One Dummy User per End User Role
- Two main questions for PO's:
 - Am I able to see everything that I need?
 - Am I able to see things that I don't need?
- Feedback via Forms Submission
- Review and adjustments afterwards



HORIZON Pretest Berechtigungen

Hi, Rabiye. When you submit this form, the owner will see your name and email address.

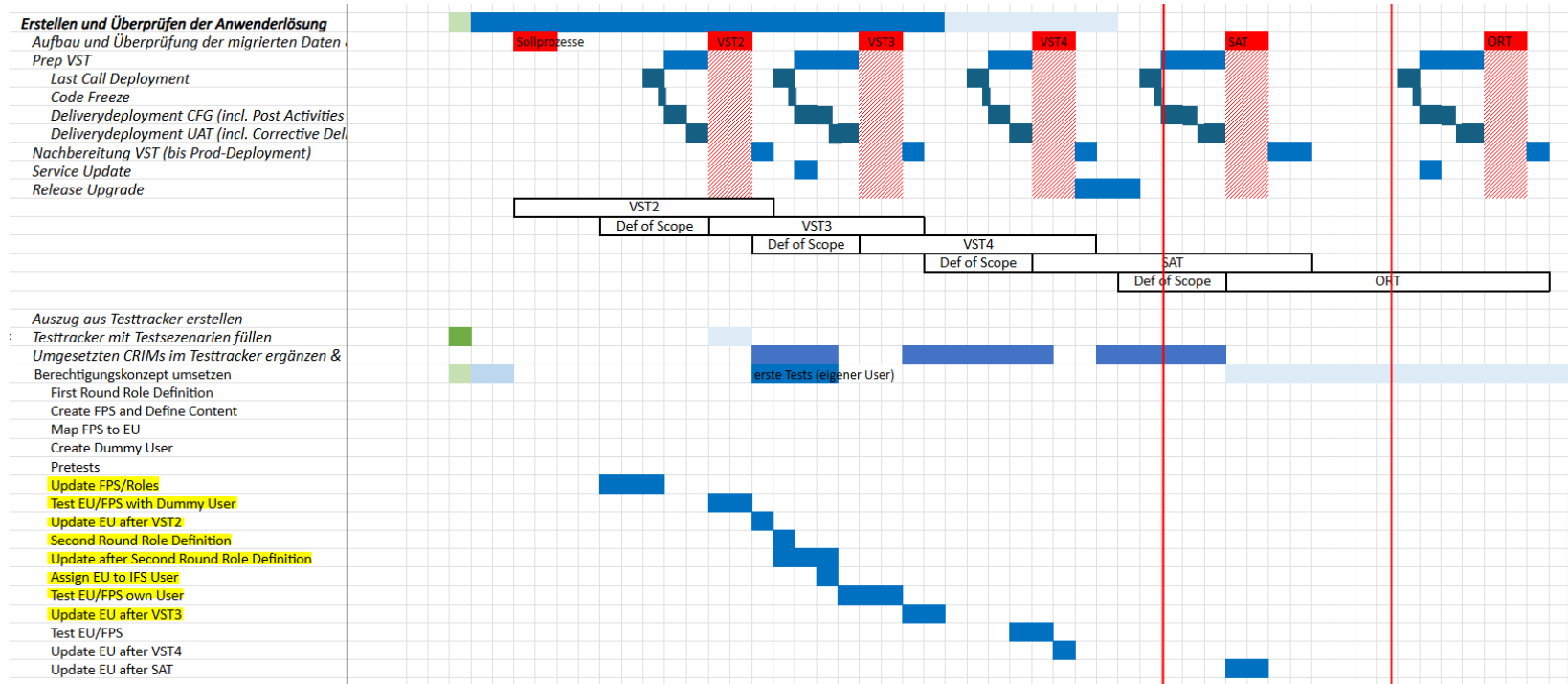
* Required

1. Testendes Teilprojekt *

- ☐ Lead2Invoice
- ☐ Product2Operate
- ☐ ETO/Projekte
- ☐ ShopOrder2Stock

2. Getestete End User Rolle *

- ☐ DMS Admin (EU_DMS_ADM)
- ☐ Dokumentenrevison (EU_DMS_STD)
- ☐ KeyUser Einkauf (EU_EK_KEY)
- ☐ Standard User Einkauf (EU_EK_STD)



VST3

VST3 Checkliste

Vorbereitungswochen

	Fälligkeit	L2O	O2O	P2O	ETO	SO2S	P2PO	P2S	IM	I2P	S2I	I2R	FICO	QM	IC	DMS	HR	ZRF	Dokument	Potenziale	Aufgaben
Berechtigungen für UAT-System über Sharepoint anfragen		Offen Erledigt	Offen Erledigt	Offen Erledigt	Offen Erledigt	Offen Erledigt	Offen Erledigt	Offen Erledigt	Offen Erledigt	Offen Erledigt	Offen Erledigt	Offen Erledigt	Offen Erledigt	Offen Erledigt	Offen Erledigt	Offen Erledigt	Offen Erledigt	Offen Erledigt	Dokument	Potenziale	Aufgaben
		● ●	● ●	● ●	● ●	● ●	● ●	● ●	● ●	● ●	● ●	● ●	● ●	● ●	● ●	● ●	● ●	● ●	● ●	● ●	● ●

- Testing will be carried out using VST3 with your personal IFS user
- Requesting permissions for test users via Sharepoint in preparation for the VST
- Carrying out the test and reporting the results in the IFS Test Tracker
- Fallback users for emergencies are provided
- Post-processing directly during and after each VST

Q&A / Discussion

Summary / Closing

- We outlined a best-practice approach for **permissions testing**, starting with **pre-tests** by process responsables and progressing to **integration testing** with real roles.
- We demonstrated how to manage **permissions across environments** by keeping **CFG as the master**, exporting to **UAT for testing**, and ensuring consistency through iterative cycles.
- We hope that you were able to get some **new insights and ideas**
- The next webinar is scheduled to take place on **30 October** at the same time. Invites will be sent out shortly
- The topic is **Handling of Presentation Objects and Projections outside of the Navigator & Lobbies**
- 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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