



IFS Permissions Webinar

Webinar 6: Audits & Segregation
of Duties

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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
 - Conversion Services

	 <p>Audit of R&P set-up</p>	 <p>R&P Concept & Training & Templates</p>	 <p>R&P Conversion 10 → Cloud</p>	 <p>IFS Permissions Manager</p>
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

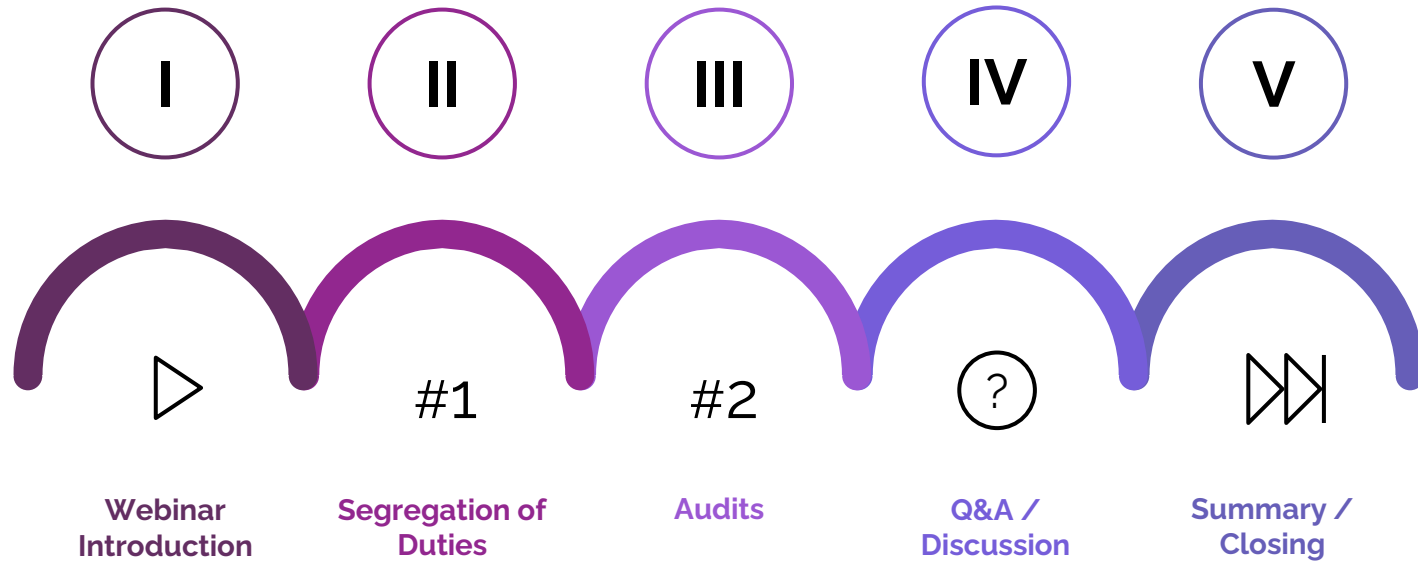
- Efficiency gains of 45% for routine tasks
- Acceleration of the initial set-up and testing due to templates
- Predefined reports for internal & external auditors
- Major reduction of effort when converting from IFS Apps 10 to IFS Cloud

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

Segregation of Duties

Topic 1

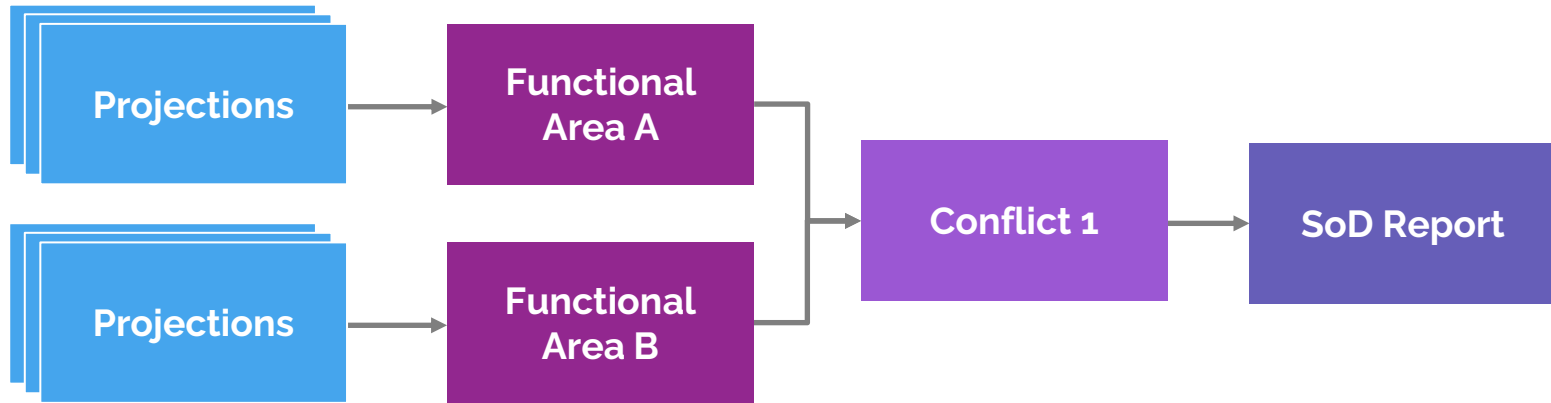
#	Topic
1	Functional Areas & Conflicts
2	SoD Report
3	Limitations & Setup Challenges
4	Tools for SoD Setup

- SoD is a key control in ERP security, it prevents fraud and errors by ensuring no user has full control over critical processes
- Required for audits (e.g. SOX), especially in finance-heavy or publicly listed environments
- Both IFS Apps 10 and Cloud support SoD in some form, but it must be configured – nothing works out of the box



Good access control ≠ good SoD unless conflict rules are defined

1) Functional Areas & Conflicts: Setup



- **Functional Areas** are sets of **projections** tied to a business activity (e.g. Supplier Payments, Purchase Orders)
- **Conflicts** are defined by **pairing two functional areas** and flagging them as *Warning* or *Not Allowed*
- Both IFS Apps 10 and Cloud support this structure
- Setup is projection-based and requires searching for each projection **manually**

1) Functional Areas & Conflicts: Examples & Use Cases

Functional Area A	Functional Area B	Why This Is a Conflict
Prepare Purchase Order	Approve Purchase Order	Same user can create and approve own PO
Maintain Supplier Bank Data	Approve Payments	Risk of fraud through self-edited vendor info
Assign User Roles	Maintain Master Data	Grants elevated access to sensitive data areas
Create Customer Orders	Approve Credit Notes	User could issue and reverse sales transactions
Maintain Inventory Adjustments	Approve Inventory Write-offs	Can manipulate stock levels undetected

Analyze Segregation of Duties

List of users with SoD conflicts

Analyze Segregation Areas						
<div><div></div><div>Details</div><div>View Functional Areas</div></div>		<div><div></div><div></div><div>24</div><div></div></div>				
(1)	User Id	Description	Conflict Name	Functional Area	Conflicting Area	Conflict Type
<div><input checked="" type="checkbox"/></div>	<div><div>MB</div>[USER ID]</div>	[Name]	[Conflict 1]	[Functional Area A]	[Functional Area B]	<div>Not Allowed</div>

Conflict Details

Which Functional Areas and permission sets are causing the issue

Conflict

[Conflict 1]

Functional Areas

[Functional Area A], [Functional Area B]

Conflict Type

Not Allowed

Affected User

MB

[USER ID]

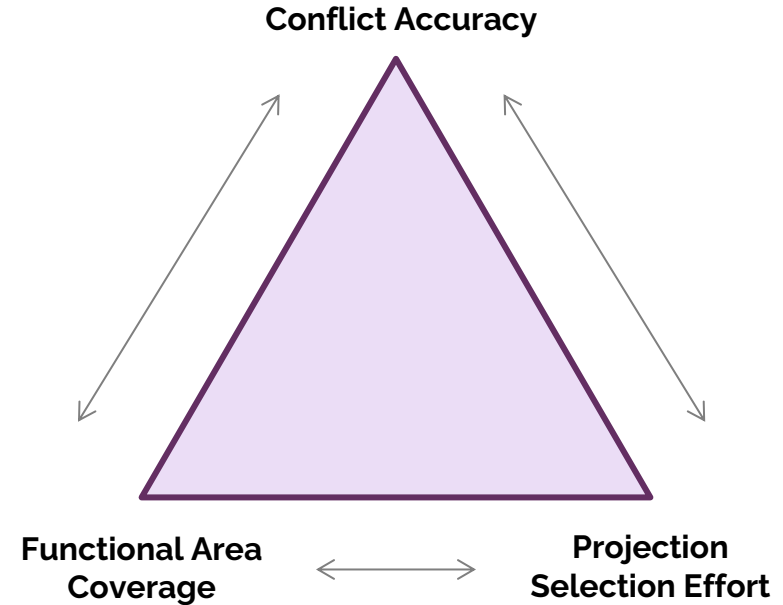
Grants causing the conflict

▼

✓	Permission Set	Security Object	Grant Type	Functional Area
<input type="checkbox"/>	: [Permission Set Name]	[Projection]	[Grant Type]	[Functional Area A]

3) Limitations & Setup Challenges

- No predefined functional areas or conflicts, customers must define all from scratch
- Requires projection-level knowledge – not linked to navigator
- Read/write distinction isn't built in (IFS Cloud) → high chance of false positives
- Functional area design is critical: too broad = overflagging; too narrow = blind spots
- Differences across sites: larger sites where users have broader access are more likely to show up in report



4) Tools for SoD Setup

- The **IFS Permissions Manager** (IPM) allows seamless SoD setup: functional areas, functional areas content, conflicts, SoD report
- Functional areas and conflicts are read from and written into IFS via API – no export/import
- Functional Areas can be defined using Navigator structure instead of manual projection search
- Generates SoD report and conflict lists in Excel format for auditors in a few clicks

		Functional Areas		
		Functional Area 1	Functional Area 2	
Navigator Entries	+ Accounting Rules			
	+ Financials			
	+ Financials - Planning			
	+ Financials - Consolidation			
	+ IOT Controller			
	- Procurement			
	+ Employee Self-Service Procurement			
	+ Requisition			
	+ Quotation			
	+ Supplier Schedule			
	+ Order			
	+ Receipt			
	+ Supplier Shipment			
	+ Authorization			

Audits

Topic 2

#	Topic
1	Auditor's Needs
2	How Companies Cope Today
3	How the IFS Permissions Manager can help
4	Summary (SoD & Audits)

Audit Question	Report they expect
Who has access to what, by process/module	User ↔ Role overview Role contents
How access changed over time	Provisioning/deprovisioning logs
Evidence of SoD monitoring and conflict resolution	SoD conflict report (with mitigation/exceptions)
Inactive or orphaned accounts and cleanup actions	Change history for critical roles/users

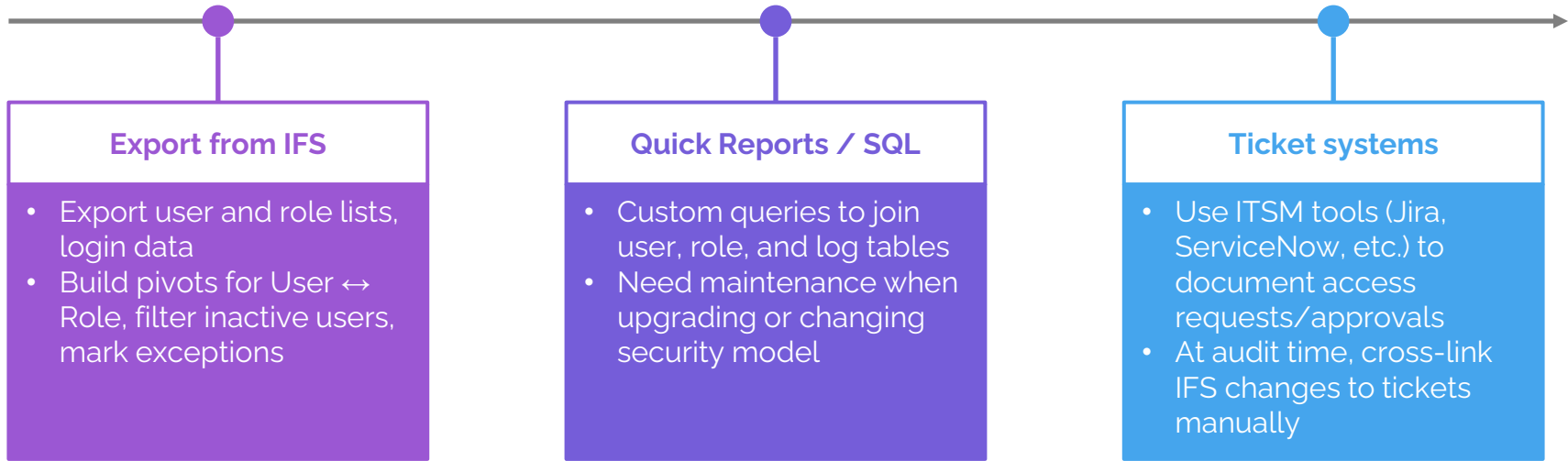
What IFS provides

- Role-based security model (functional & end user roles, user groups, SoD functional areas)
- Screens and basic reports to:
 - See which roles a user has
 - See which users have a particular role
 - Define SoD functional areas & conflicts and run an analysis
- Technical logs are available (history log, login history) if configured

Limitations from auditor's perspective

- **Fragmented**
 - Information is spread across multiple screens and logs, no single "security cockpit"
- **No standard User ↔ Role ↔ Permission matrix**
 - Need Excel, Quick Reports, or SQL to get a complete picture
- **Provisioning & deprovisioning not reported cleanly**
 - History exists in log tables, but no out-of-the-box "who changed what, when" report
- **Inactive users require workarounds**
 - Last login data can be derived, but no standard "Inactive Users > X days" report
- **SoD results are not auditor-friendly by default**
 - Analysis shows conflicts on-screen, exporting and documenting them is manual

2) How Companies Cope Today



Result:

- Process can work but is slow, error-prone, and person-dependent
- Bigger pain for public companies with recurring audits



IFS PERMISSIONS MANAGER



Available Reports

- List of End User Roles per User
- Navigator to Functional Role Matrix
- End User Role Breakdown
- SoD Navigator to Functional Area Matrix Editor & Excel Report

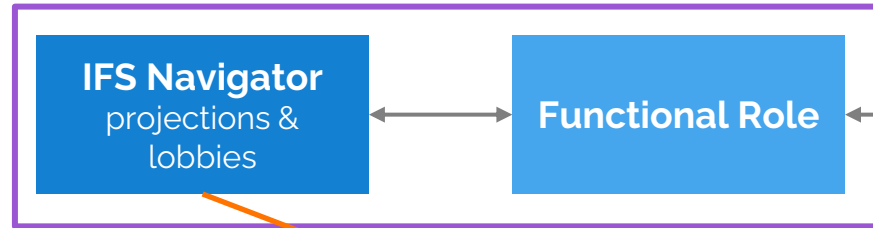


Coming Soon

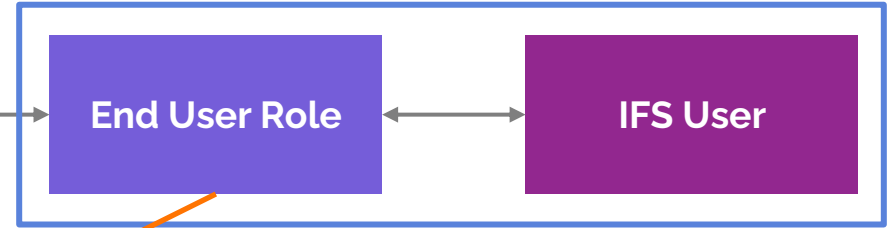
- User Activity Log
- Audit Trail Report
- User Provisioning & Deprovisioning Report
- Inactive User Report

3) How the IFS Permissions Manager can help: Structure

1) Navigator to Functional Role Matrix



2) Users by End User Role (also in IFS)



3) End User Role Breakdown Matrix

= Navigator x End User Role (via Functional Roles)

3) How the IFS Permissions Manager can help: End User Role Breakdown

Top Level View

Navigator Structure		
	EU_FIN_KEY	EU_FIN_STD
Solution Manager		
My Administration		
Document Management		
Human Capital Management	●	●
Technician Portals		
Training		
Reporting	✓	✓
Application Base Setup	●	●
Accounting Rules	●	●
Financials	●	●
Financials - Planning	●	●
IOT Controller		
Procurement	●	●
Sales	●	●
Shipment Management	●	●
Warehouse Management	●	●
Part Master Data	●	●
Relationship Management	●	●
Engineering	●	●
Supply Chain Planning	●	●
Manufacturing	●	●
MRO and Fleet Operations		
Quality Management	●	●
Contract Management	●	●
Project Management	●	●
Resource Management	●	●
Service	●	●
Maintenance	●	●
Developer Tools		

Drill-down

Navigator Structure		
	EU_FIN_KEY	EU_FIN_STD
Financials - Planning	●	●
Business Planning	✓	✓
Planning Unit	✓	✓
Planning Transactions	✓	✓
Business Plan	✓	✓
Business Plans	✓	✓
Planning Units	✓	✓
Planning Unit Structure	✓	✓
General Planning Basic Data	✓	✓
Personnel Planning Basic Data	✓	✓
Business Planning Administration	✓	✓
Business Planning Administrators	✓	✓
Planning Unit Administrator Groups	✓	✓



SoD is only as good as your Functional Areas and Conflicts



Projection-based setup is not intuitive – IPM helps with Navigator matrix



Expect false positives unless you scope Functional Areas carefully



Standard IFS outputs rarely match auditor formats out of the box



Most teams rely on exports, pivots, and manual evidence trails



IPM consolidates access and SoD views into audit-ready reports

Q&A / Discussion

Summary / Closing

- We showed how **SoD** in IFS relies on well-designed functional areas and conflicts, and how tools like the **IFS Permissions Manager** (IPM) can simplify setup and ongoing maintenance
- We highlighted why **standard IFS reporting** is often not **audit-ready** and how structured approaches and supporting tools are needed to produce clear, repeatable audit evidence
- We hope that you were able to get some **new insights and ideas**
- **Next year's webinars** are being planned and prepared. We will **update** you at the beginning of the new year
- We are always open for further **topic suggestions** – let us know!
- If there are any specific issues that you would like to discuss individually, feel free to **reach out to us**

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

