



IFS Permissions Webinar

Webinar 8: Data Access Control
in 25R1/25R2
& One Year of IFS Permissions
Webinars

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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

	 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

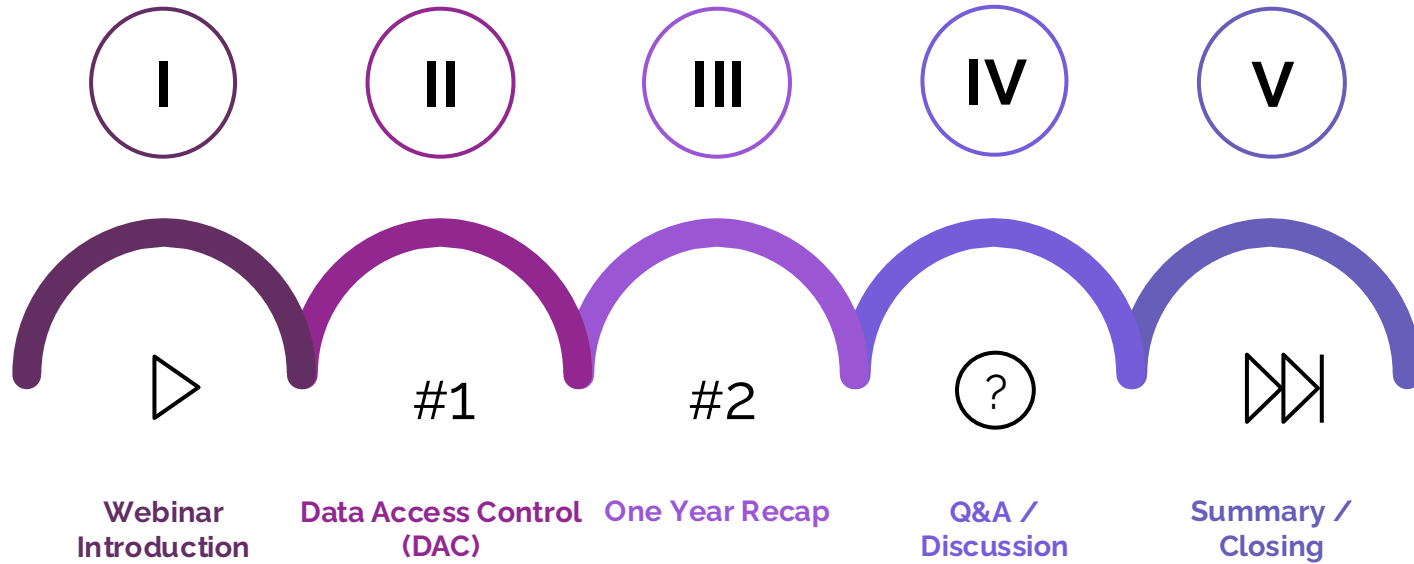
- Efficiency gains of 45% for routine tasks
- Acceleration of the initial set-up and testing due to templates
- Predefined reports for internal & external auditors
- Major reduction of effort when converting from IFS Apps 10 to IFS Cloud

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

ONGOING 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

- Two topics presented by 2BCS / Purple Services
- Series now in its second year
- 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

Data Access Control in 25R1/25R2

Topic 1

#	Topic
1	Security in IFS Cloud Before DAC
2	What DAC Is + Activation Mechanics
3	How DAC Works: ACLs and Configuration
4	Limitations & Decision Framework



Permission Sets at the Core

Users are granted access to projections through Functional Roles and End User Roles



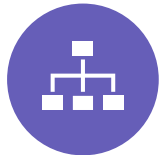
Projection-Level Access Control

Access is enforced at the API / projection layer, not at the UI layer



Coarse Data Filtering

Company and Site access is filtered per user, but not per record, entity, or field



No Row-Level or Field-Level Security

Customers often build custom solutions or accept broad data access within granted projections

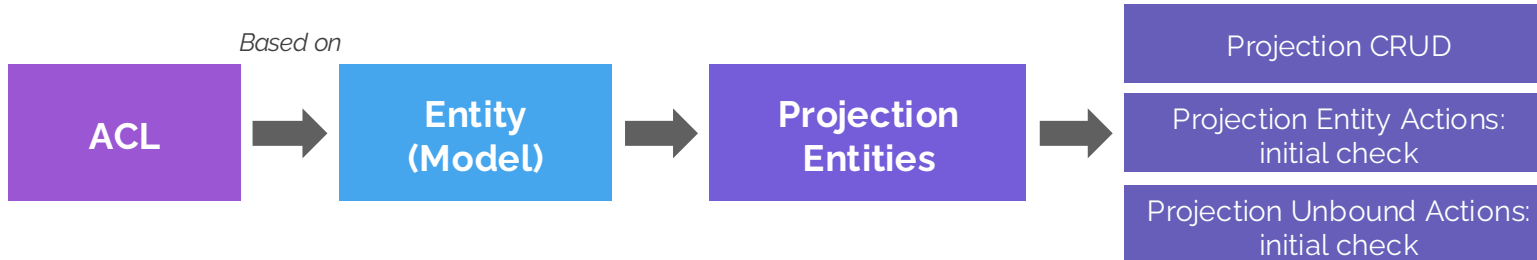
- Data Access Control (DAC) adds Access Control Lists (ACLs) on top of existing Permission Sets to restrict data access at the API level
- For Read, ACLs filter the data returned
- For Create / Update / Delete, ACLs serve as an initial check on whether the operation is allowed
- Introduced in 25R1; activated via the Data Access Control system parameter (ON/OFF). The APPOWNER user bypasses all ACL filters

2) DAC Architecture: Two Configuration Methods

Method 1: Based on Projection (specific projection)



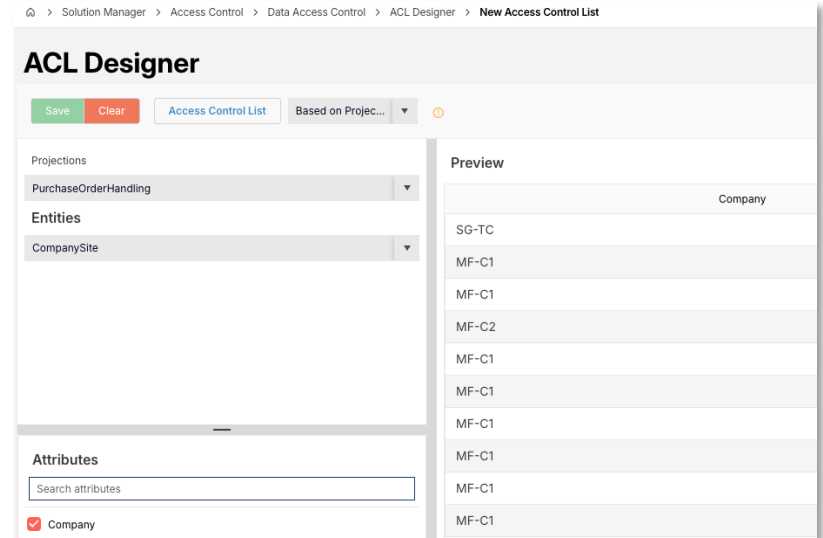
Method 2: Based on Entity (universal, multi-projection)



An ACL filters CRUD on the Projection Entity for Read, and serves as an initial check for Create / Update / Delete and for Actions



1. **Design ACL** in ACL Designer (choose Entity vs Projection source, select attributes, configure filter, save)
2. **Apply to Projections** via the "Apply Access Control list to Projections" assistant, this maps the ACL to specific Projection Entities, Entity Actions, and Projection Actions, and assigns CRUD operations
3. **Review** on Data Access Control for Projections page
4. **Publish** the projection (separate from "Apply"). Only published ACLs are evaluated at runtime; only unpublished projections can be edited.



4) Limitations: What DAC Does Not Cover

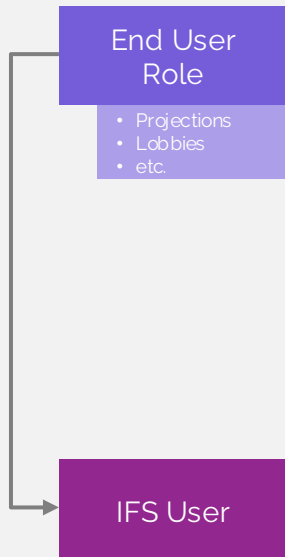
Area	DAC Coverage	Practical Impact
Queries	Not filtered by DAC	Projection Queries are not considered in this release (Projection Entities only)
Operational Reports	Not filtered by DAC	Operational Reports do not utilize APIs; restrict via Permission Sets / report design
Quick Reports	Not filtered by DAC	Quick Reports do not utilize APIs; restrict via Permission Sets / report design
Background Jobs	Not filtered by DAC	Background jobs do not utilize APIs and are not subject to DAC
SQL-Based Lobby Data Sources	Not filtered by DAC	API-based lobby data sources are supported; SQL-based sources need separate filtering
Direct Database Access	Bypasses DAC entirely	ACLs are enforced only for APIs; direct DB connections may show different data

One Year of IFS Permissions Webinars

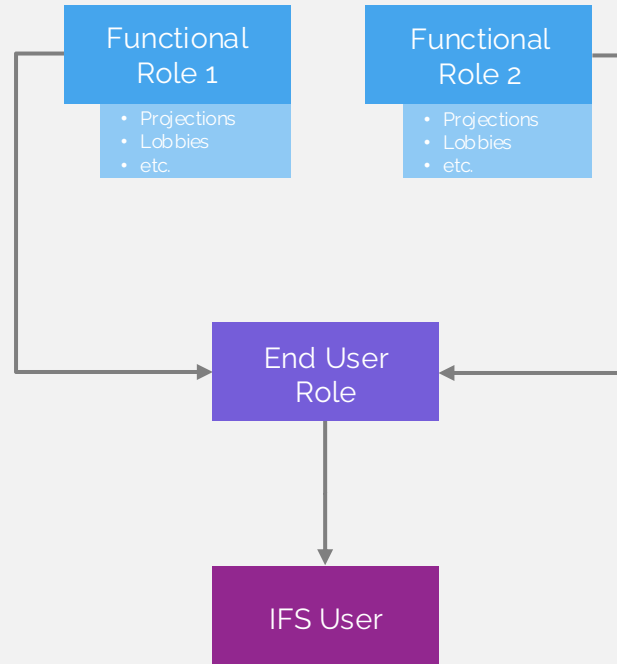
Topic 2

#	Topic
1	W1 & W2: Limitations and Methodology
2	W3: Example Role Structure
3	W4: Testing and Environment Management
4	W5, W6 & W7: Lobbies, SoD, Audits, Upgrades

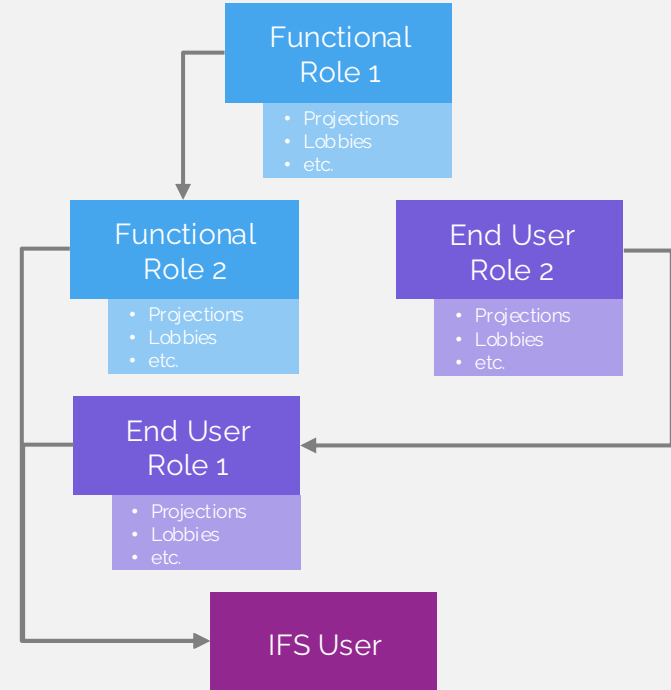
Single Layer



Two Layers



Multiple Layers / Nested



Functional 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

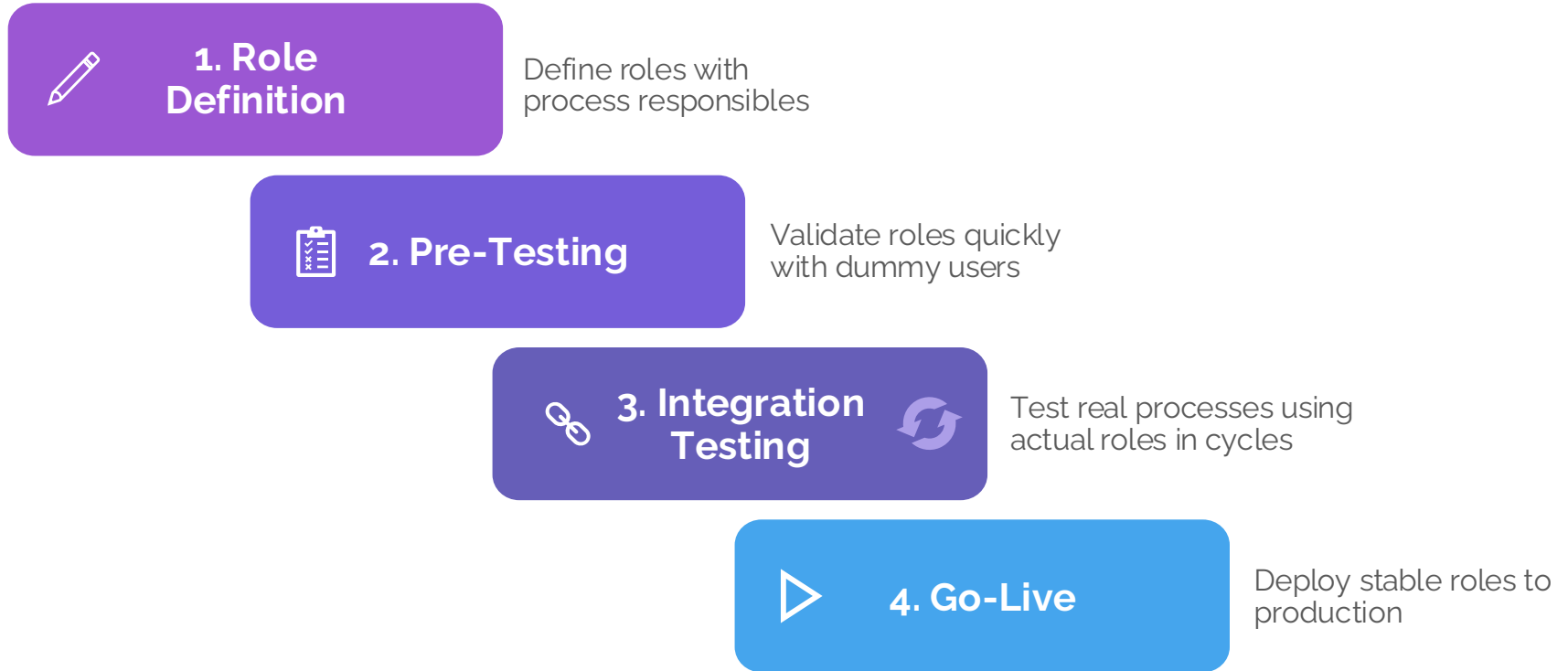
End User Roles

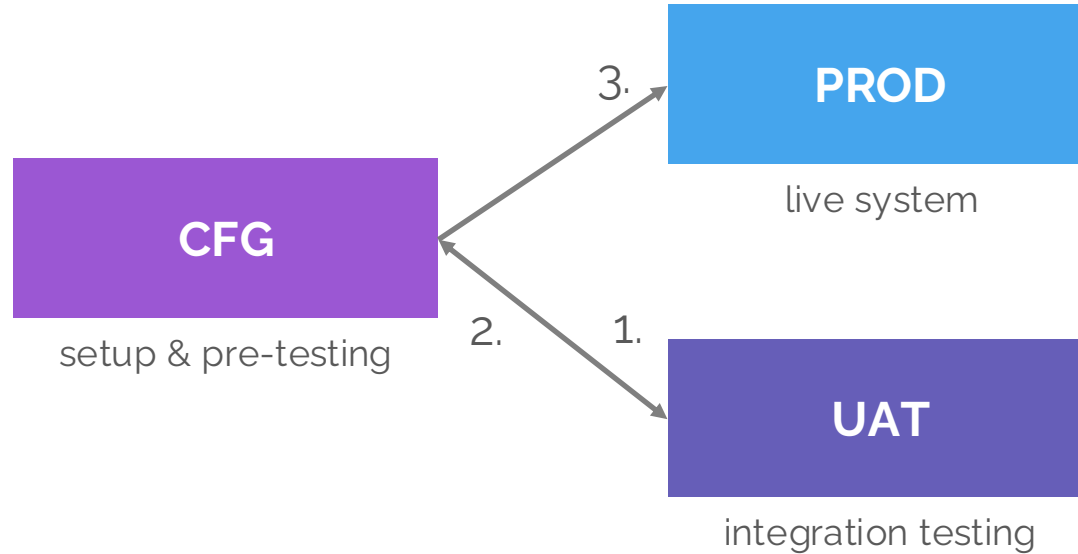
- Contain only Functional Roles – no direct permissions
- Role-based (job-level)
- Assigned to users
- Combines multiple Functional Roles to form a complete user role
- Easy user management

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)

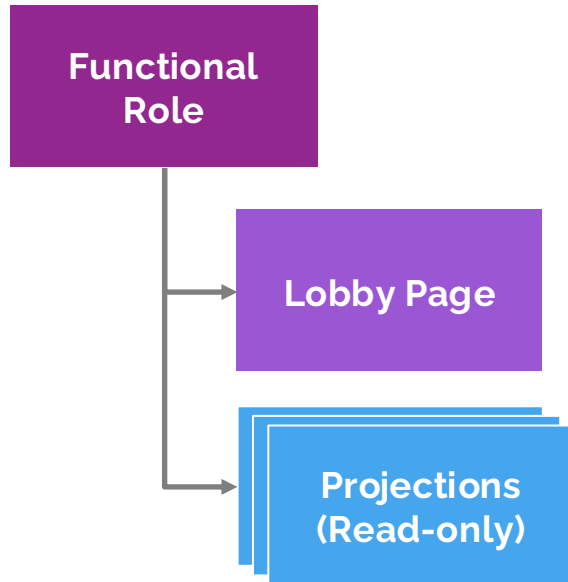
2) Webinar 3: Example Role Structure

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	✓			

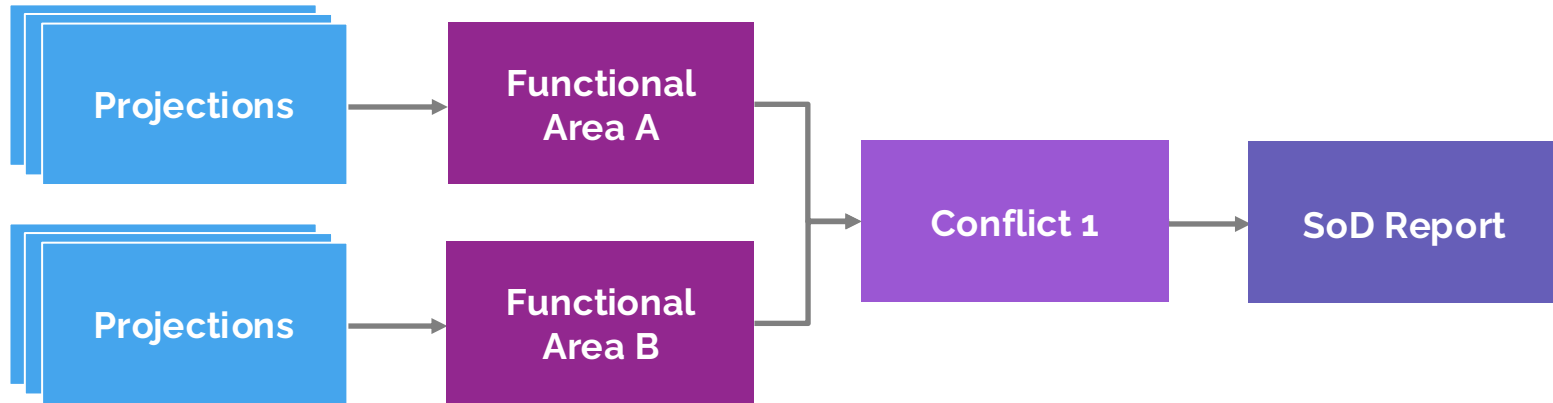




1. Export/import roles between CFG & UAT
2. Consolidate corrections back into CFG
3. Final export from CFG to PROD before go-live



1. **Identify the Lobby Page:** *Solution Manager* → *Configuration* → *Lobby* → *Lobbies*
2. **Create a new Functional Role** for this lobby (e.g. FR_SLS_LOBBY_SALES_DASHBOARD)
3. **Add the Lobby Page** under *Permission Set* → *Lobby Pages*
4. **Add all referenced Projections** under *Projections* tab (read-only access is usually sufficient)
5. **Test with a user** assigned only to this Functional Role (indirectly, using an End User Role) → verify all tiles populate correctly and are clickable without error



- **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**

Decision Factor	Greenfield	Brownfield
Current Role Quality	High debt / bloated roles → clean reset	Clean, well-maintained roles → carry forward
Compliance / SoD	Easier to design around least privilege & SoD	Inherit existing controls, adapt incrementally
Timeline Pressure	Higher upfront effort, faster post-go-live	Faster to go-live, slower post-go-live cleanup
Process Standardization	Standard processes → clean job roles	Many exceptions → replicate pragmatically
Internal Knowledge	Structured workshops to rebuild	Leverages existing knowledge of legacy roles
Evergreen Readiness	Modular, testable, governable from day one	Requires scheduled optimization after go-live



DAC adds an ACL layer on top of Permission Sets for fine-grained data access control



An ACL is based on a Model entity and applied to qualifying Projection Entities; activated via system parameter



The two-layer methodology from W2 / W3 remains the foundation for any IFS Cloud permission setup



Testing, Navigator gaps, SoD, audits, and upgrades are the recurring themes across the series

Q&A / Discussion

Summary / Closing

- We walked through Data Access Control (DAC), the new ACL layer in IFS Cloud 25R1 and 25R2, how it layers on top of Permission Sets, and the coverage gaps to be aware of.
- We recapped one year of IFS Permissions Webinars: methodology, example role structures, testing, Navigator and lobbies, SoD and audits, and 10-to-Cloud upgrades.
- We hope that you were able to get some **new insights and ideas**
- The next webinar is scheduled to take place on 25 June at the same time. Invites will be sent out shortly. The topic is IFS Cloud 26R1 Updates & Updates on IFS Permissions Manager
- 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

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