



IFS Permissions Webinar

Webinar 9: Permissions in the
Evergreen Release Cycle
& IFS Unleashed 2026

27 August 2026

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

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

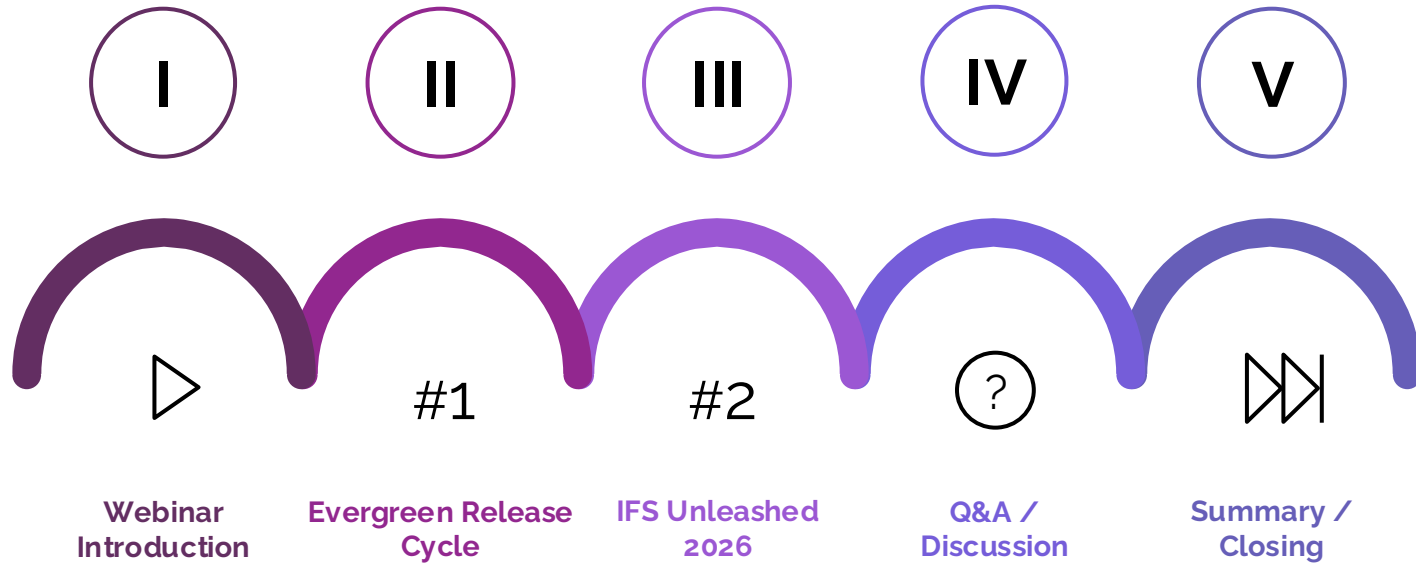
- Efficiency gains of 45% for routine tasks
- Acceleration of the initial set-up and testing due to templates
- Predefined reports for internal & external auditors
- Major reduction of effort when converting from IFS Apps 10 to IFS Cloud

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

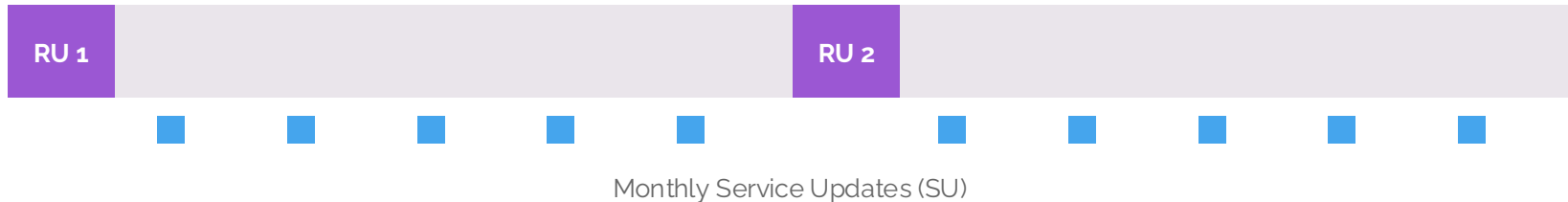
The webinar will be recorded and will be shared on the webinar website

Permissions in the Evergreen Release Cycle

Topic 1

#	Topic
1	The Evergreen Cadence and Its Effect on Permissions
2	What Actually Changes in an Update
3	Detection: Finding What Changed
4	A Realistic Update Routine

- **Two Release Updates a year**, with Service Updates every month in between. Both can change what sits inside a projection
- **Updates arrive on IFS's schedule.** In Apps 10 you chose when to upgrade; in Cloud the date is set for you
- **A permission set is a snapshot** taken against one version of the data model, and that model moves twelve times a year



What you granted in March is not necessarily what your users hold in September

1) What Typically Goes Wrong

No Owner

Update testing covers functional and technical checks. Permission sets are assumed to carry over, with no owner assigned to verify them.

No Warning

IFS issues no notification when an update changes a granted projection.

Too Much to Retest

Full regression across every role and permission set after each update exceeds available capacity in most organisations.

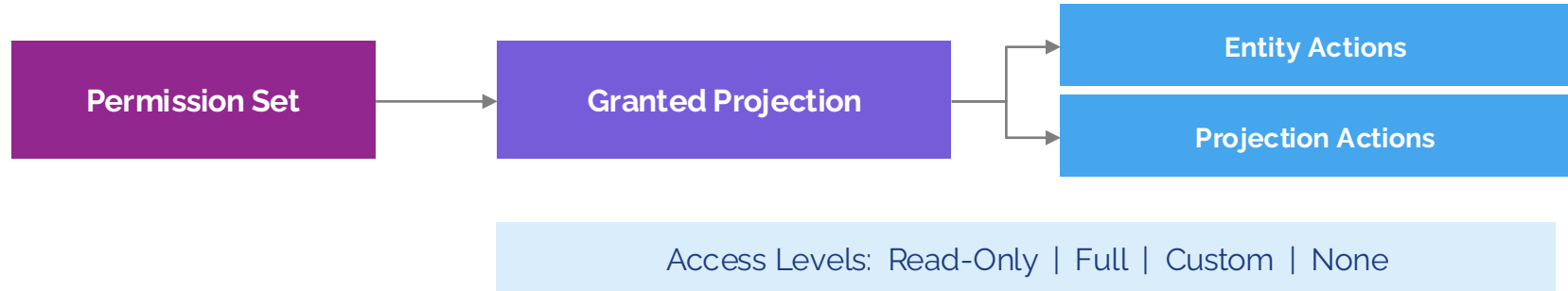
Found by the User

Access problems reach the team as individual production tickets, days or weeks after the update.

2) What Actually Changes in an Update

What IFS Does	What You See	What Your Users Experience
Adds an action or entity to a granted projection	Access Level can no longer read Full, so it shows as Custom	Users keep what they had. They do not get the new function.
Adds a new projection or page	Nothing. It is granted to nobody.	No access on a feature the release notes promised. Navigator-based sets do not pick it up.
Deprecates a projection or API you grant	An entry in the IFS deprecation log, if it is being tracked	Nothing yet. This is the advance notice for the row below.
Removes a projection	The grant disappears	The process breaks. No permissions fix exists; the process itself has to be redesigned.

2) "Custom" Is Your Only Change Signal



- **Full** grants every Entity Action and Projection Action in that projection. Read Only grants none of them
- **Custom** is what the system displays when the grant is no longer uniform. It is never a level you choose
- **A release that adds an action you have not granted** can only render as Custom. Nothing notifies you, so you have to go and look

2) What People Assume, and What Actually Happens

The Common Assumption

Permission sets are wiped by a release upgrade

Re-importing the backup restores the correct state

If nothing errors at update time, nothing changed

The release notes list what needs checking

Testing the critical processes afterwards is enough

Nothing errors, so nobody looks

What Actually Happens

They persist. IFS documents no wipe anywhere

It also overwrites every correction made since the export

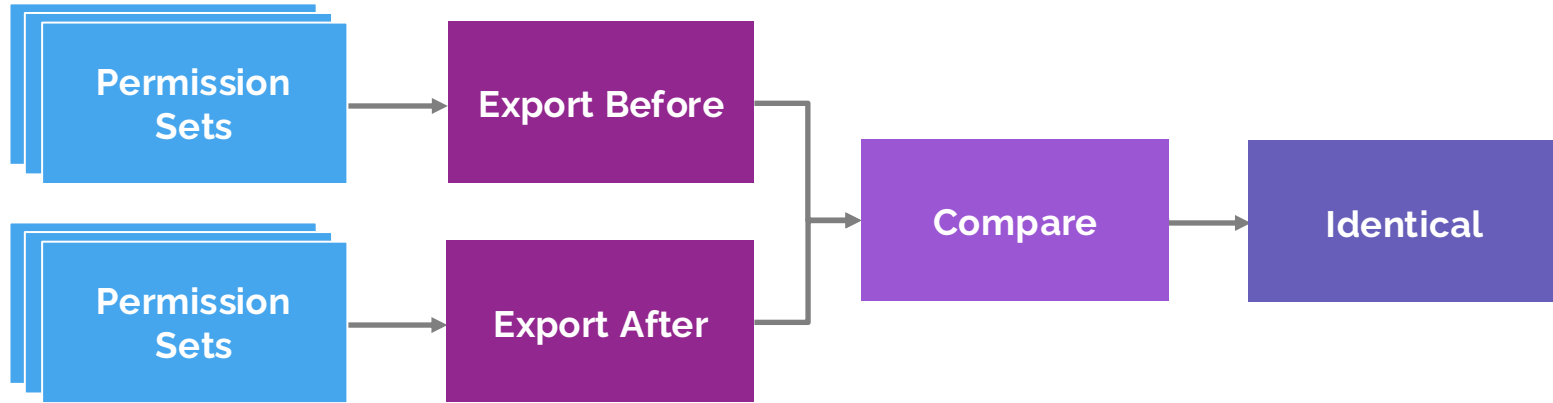
Grants move to Custom silently, and grants against removed projections disappear

Release notes are not mapped to permission sets

It does not show whether the update widened access

One snapshot of the live Access Level catches all of it

3) What the Export Does and Doesn't Give You



- **Export before every update anyway.** It is your restore point and your record of what you granted
- **What it cannot give you is the Access Level**, which is derived by comparing your grants against what the model currently offers
- **That comparison is not in the file.** An update changes the model, not your grants, so both exports match even where levels have moved
- **For drift you need a snapshot of the derived Access Level**, taken from the live system and kept outside it

Access Level exists only in the live system, so the scan has to run there



Browser, not a file

Access Level is Custom

Against your snapshot

Only what is new

So it survives

1. **Paste an OData URL into the browser**, signed in to IFS. No SQL access, no database, no dev tools
2. **Filter to Custom.** In a live environment with 400 functional roles that is 3,636 of 38,147 projection grants, about one in ten
3. **Compare against your last snapshot.** Anything Custom now that was not Custom then is the investigation list
4. **Investigate only the new ones.** Each is either an action IFS added, or a change somebody made
5. **Document what was deliberate.** Otherwise the next person resets it to Full

3) Two Kinds of Custom, One Badge

Deliberate	Drift	Identical on Screen	One in Ten
Someone revoked specific actions on purpose. The set is doing exactly what it should.	A release added an action that nobody granted. The level moved on its own.	Both show the same Custom badge. Nothing records which one you are looking at.	In a live 400-role environment, 3,636 of 38,147 projection grants sit at Custom.

The permission set Description is the only field IFS gives you to record why. One query returns the Custom grant and its description together.

3) What IFS Gives You, and What It Doesn't

What You Need	IFS Cloud Standard	The Gap
Notification that a projection changed	Nothing in the security area	Impact Analyzer and Update Analyzer cover customizations, not permissions
See what a release changed in a permission set	Compare Permission Sets, with Compare with Original	Detects grant differences between two sets. An update changes neither set's grants, so it reports nothing.
A fingerprint to spot changed sets	A HASH element in the export file	Keys on the projection list only. Blind to Access Level.
Find who is affected by a changed projection	Projection Summary, available since 25R1	Reverse lookup at last. Manual, one projection at a time.
Access Level history	Nothing. It exists live only.	Permission Set Grant Reports cover roles to users, not projections.

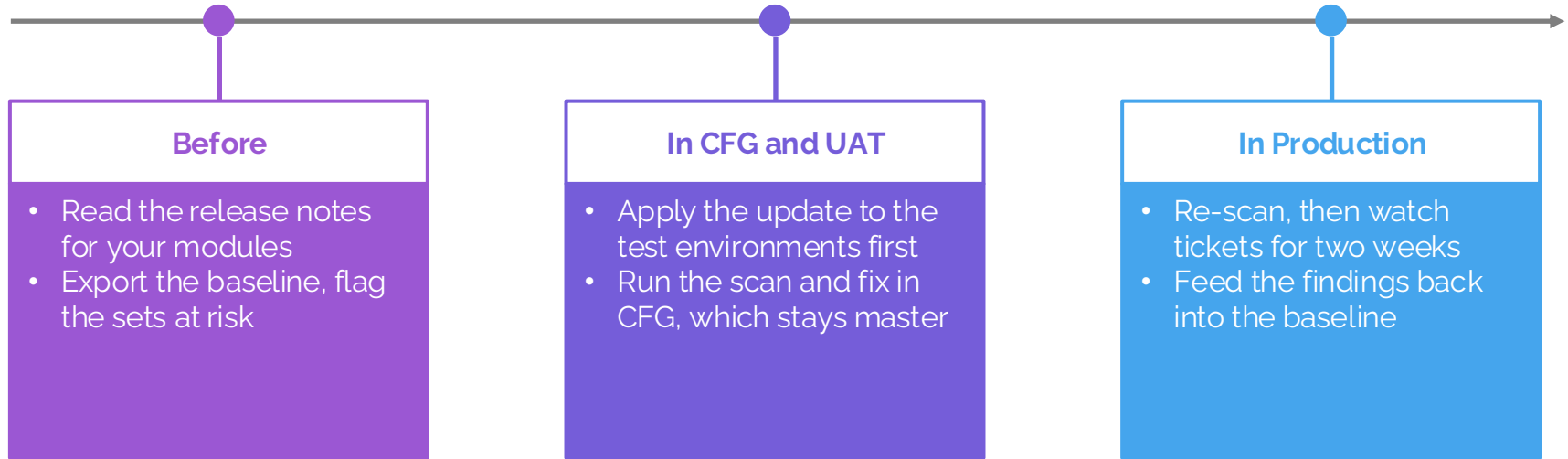
Always Test

- Roles touching any module named in the release notes
- High blast radius roles, the ones many users hold
- Roles carrying SoD-sensitive content
- Any set where a new Custom appeared

Rotate the Rest

- One process stream per month, so each is covered twice a year
- Full routine on Release Updates, a light scan on Service Updates
- Negative tests: did this update widen anyone's access?
- That one surfaces in an audit, not in a ticket

4) The Update Routine



Cadence:

- Full routine on the two Release Updates each year
- A light scan on the monthly Service Updates

4) Projection Summary: The Reverse Lookup

Projection Summary

Q Search

AccountGroupsHandling

Category: Users

AccountHandling

Category: Users

AccountingPeriodsHandling

Category: Users

AccountsHandling

Category: Users

AccountTypesHandling

Category: Users

AccrualNavigator

Category: Users

AdditionalCodePartsHandling

Category: Users

ApprovalCombinationRuleHandling

Category: Users

ApproverAssigningRuleHandling

Category: Users

AccountGroupsHandling

Grant to Permission Sets

Name: AccountGroupsHandling No of Pages: Multi Page Category: Users Component: ACCRUL

Description: Account Groups Handling

PAGES PERMISSION SETS GRANTING THIS PROJECTION USERS GRANTED THIS PROJECTION USER GROUP USERS GRANTED THIS PROJECTION

View Page

(t)	Page Name	Technical Name	Page Type	In Navigator
☐	Copy To Companies	CopyToCompaniesAssistant	Assistant	No
☒	Account Groups	List	Page	Yes
☐	Account Groups	MultiCompanyList	Page	No

- **Four tabs, one projection.** Its pages, the permission sets granting it, the users, and the user group users
- **In Navigator: Yes / No.** Per page. Two of the three pages here are not reachable from the navigator
- **Grant to Permission Sets.** Fix the gap from the same page where you found it
- **Available since 25R1, and never announced.** Absent from the What's New, and In Navigator is named in the docs without explanation

(1)	Page Name	Technical Name	Page Type	In Navigator
☐	Copy To Companies	CopyToCompaniesAssistant	Assistant	No
☒	Account Groups	List	Page	Yes
☐	Account Groups	MultiCompanyList	Page	No

1) Name an Owner

- In Webinar 7 the message was that permissions needs its own workstream in an upgrade. The same is true in run mode, and it is missed far more often
- One of our webinar guests runs permissions for 2,500 users with a single person, effectively full-time

2) Put It in the Runbook

- Add the post-update scan to the standard update runbook, so it happens without anyone having to decide
- Budget it as recurring effort rather than as an incident
- Catching a broken grant in CFG costs a fraction of catching it as a production ticket



A permission set is a snapshot of a model that moves 12x a year



Four things change in an update, only Custom is visible



Access Level is derived, not stored, so exports cannot show drift



Scope regression by risk, and document deliberate Custom

IFS Unleashed 2026

Topic 2

#	Which topic should we cover next?
1	Governance and organisational setup of roles & permissions
2	Joiner, mover, leaver: user lifecycle and provisioning
3	Using (or not using) user groups for permissions management
4	Troubleshooting: finding what is actually missing
Post your pick in the Q&A now, or use the feedback form in the follow-up email	

Q&A / Discussion

Summary / Closing

- We looked at what an update does to a permission set, and why the move to Custom is the only signal
- We covered why an export cannot serve as a baseline, the post-update scan, and how to scope a realistic regression test
- We looked at Projection Summary in 26R1, and at the difference between a deliberate Custom and drift
- Our guest gave a preview of IFS Unleashed 2026 in Orlando, 12 to 16 October. Both of us will be there
- The next webinar is on 29 October at the same time. Tell us which topic you want in the feedback form
- We are always open for further topic suggestions – let us know!

THANK YOU

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