



IFS Permissions Webinar

Webinar 5: Handling of
Projections Outside of the
Navigator & Lobbies

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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

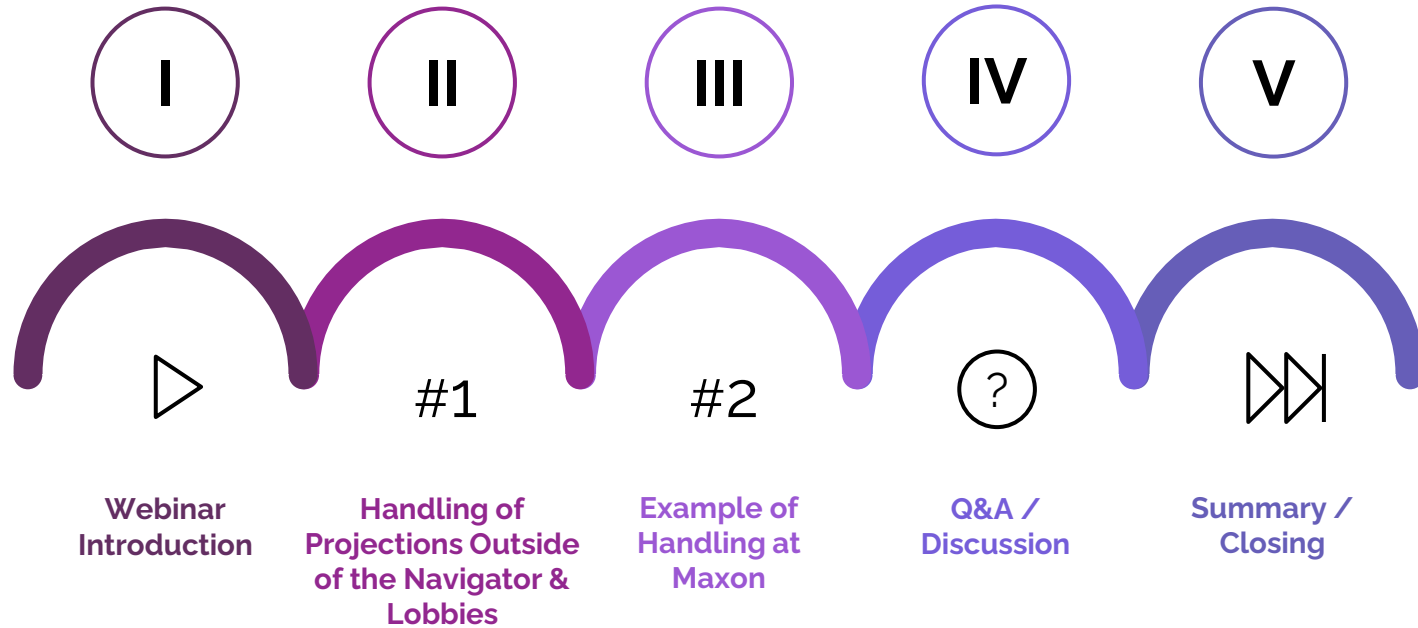
- Efficiency gains of 45% for routine tasks
- Acceleration of the initial set-up and testing due to templates
- Predefined reports for internal & external auditors
- Major reduction of effort when converting from IFS Apps 10 to IFS Cloud

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

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

Handling of Projections Outside of the Navigator & Lobbies

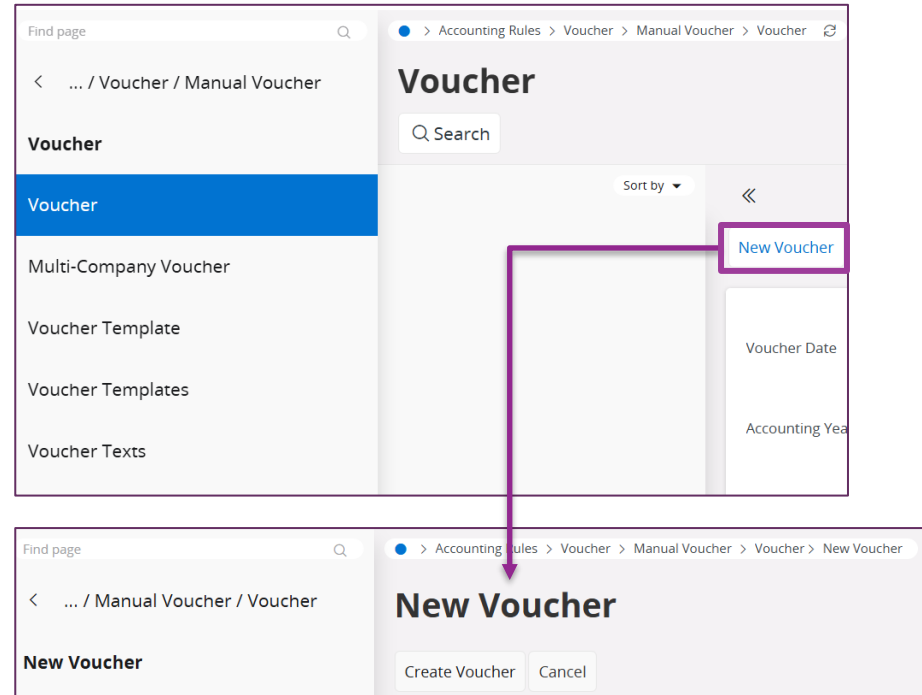
Topic 1



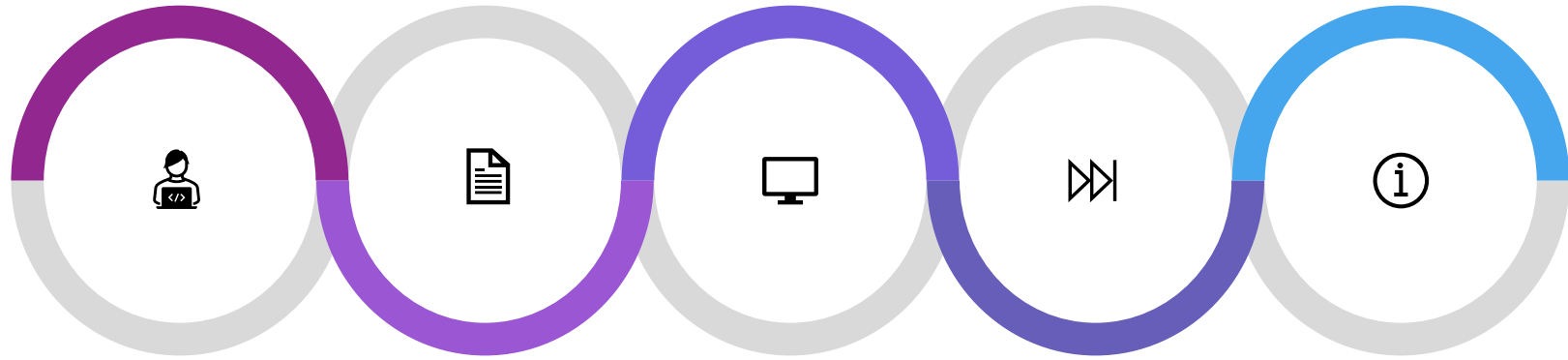
#	Topic
1	Navigator vs. Hidden Projections
2	Finding & Fixing Missing Projections
3	Lobbies
4	Best Practices & Summary

1) Navigator vs. Hidden Projections: How IFS Permissions Work

- Permissions are granted at **projection level**
- “Manage by Navigator” only displays projections **included in the default navigator**
- Any projection not tied to a navigator node won't be listed → not granted
- These missing projections often block access to downstream pages



2) Finding & Fixing Missing Projections: Using Developer Mode to Identify Hidden Projections



1. Enable Developer Mode

Open the IFS Cloud tab in DevTools

2. Navigate to Page

Navigate to the page you want to analyze (e.g. Voucher)

3. Check Panel

Projection: shows projection (e.g. VoucherHandling)

No Assistants section visible
→ indicates this page is part of the navigator

4. Open Next Page

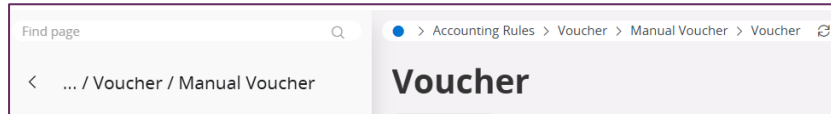
Click an action button (e.g. New Voucher)

5. Assistants Section

Assistants section now appears → not listed in the navigator

1) Navigator vs. Hidden Projections: Voucher / New Voucher

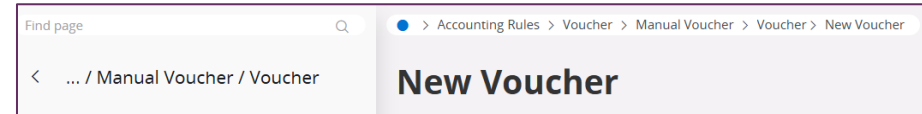
1. Admin grants "Accounting Rules / Voucher" in Manage by Navigator
2. User opens Voucher page → works fine
3. User clicks "New Voucher" → *No Access* error
4. Cause: "VoucherEntryAssistantHandling" projection missing



Page info

Main page:

Entity (LU Name): Voucher
Projection: **VoucherHandling**
Projection Entityset: VoucherSet
Projection Entity: VoucherEntry
View: VOUCHER
Component: ACCRUL

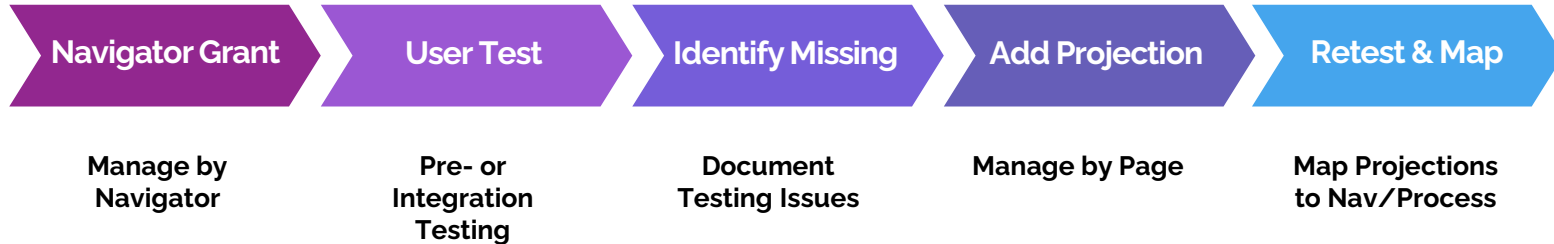


Page info

Main page:

Entity (LU Name): VoucherEntry
Projection: **VoucherEntryAssistantHandling**
Projection Entityset: VoucherSet
Projection Entity: VoucherEntry
View:
Component: ACCRUL

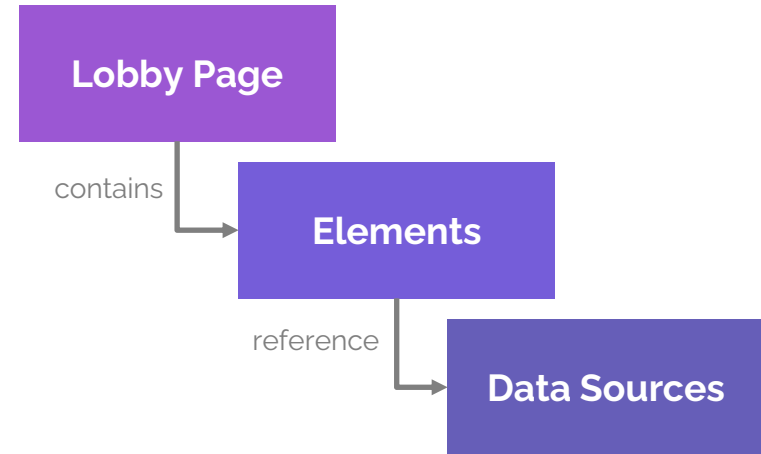
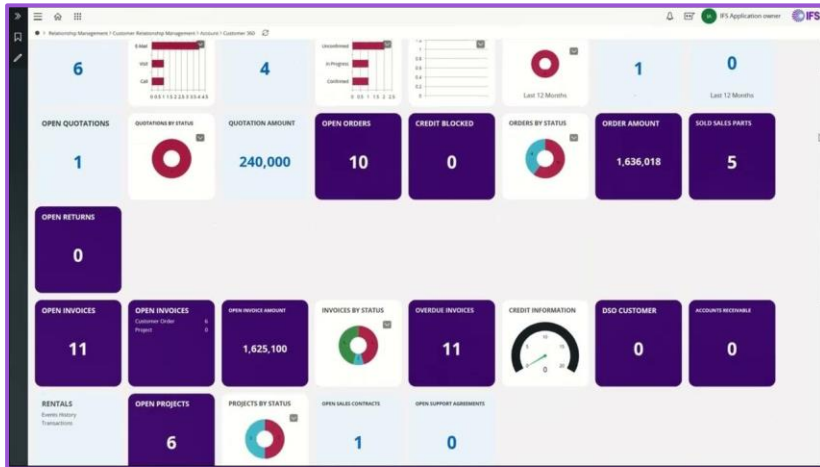
Recommended cycle for managing missing projections

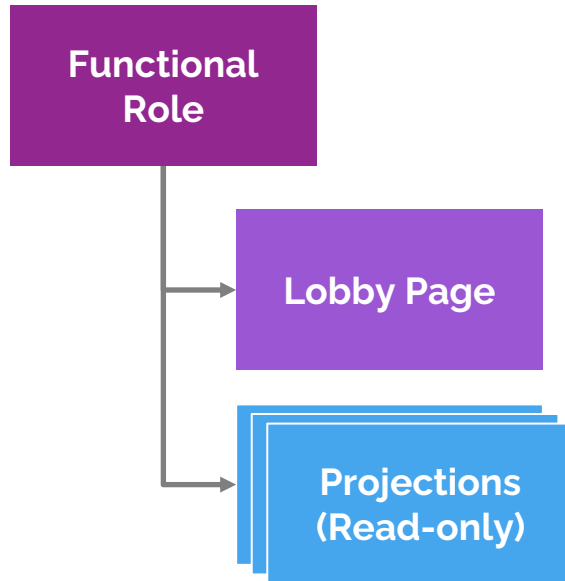


1. Build roles with **Manage by Navigator** first (fast baseline)
2. **Test** all major workflows with restricted user accounts
3. Document **missing projections** once identified for future updates
4. Supplement using **Manage by Page** to cover assistants/dialogs
5. **Retest** and maintain internal **mapping** of process → projections

3) Lobbies: Understanding Lobbies in IFS Cloud

- Lobbies are interactive dashboards composed of **pages, elements, and data sources**
- All granted lobbies are visible under **My Lobbies** (some also appear in the **Navigator**)





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

3) Lobbies: Best Practice

DO	DON'T
One Functional Role per Lobby	Reuse random module roles
Group related lobbies into domain sets	Mix edit + read-only access
Keep projection access read-only	Leave projections ungranted
Maintain a short lobby registry	



Not all projections are visible in navigator → hidden pages exist



Use Page Info, testing, and Manage by Page to uncover them



Combine convenience (navigator) with completeness (manual grants)



Continuous improvement: refine permission sets as new releases add content



Always grant the Lobby Page + all referenced projections (read-only)



Create one Functional Role per Lobby ("Lobby Package")

Example of Handling at Maxon

Topic 2

Q&A / Discussion

Summary / Closing

- We demonstrated how to identify and resolve **hidden projections** by combining **Navigator-based** setup, **Developer Mode** analysis, and page-level grants to achieve complete role coverage
- We outlined a structured approach for managing **Lobbies** through **dedicated Functional Roles**, ensuring each dashboard and its referenced projections remain consistent, secure, and upgrade-proof
- We hope that you were able to get some **new insights and ideas**
- The next webinar is scheduled to take place on **18 December** at the same time. Invites will be sent out shortly.
- The topic is **Audits & Segregation of Duties**
- 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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