



IFS Permissions Webinar

Webinar 7: Permissions in 10 to
Cloud Upgrades
& Semi-Automated Conversion

26 February 2026

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

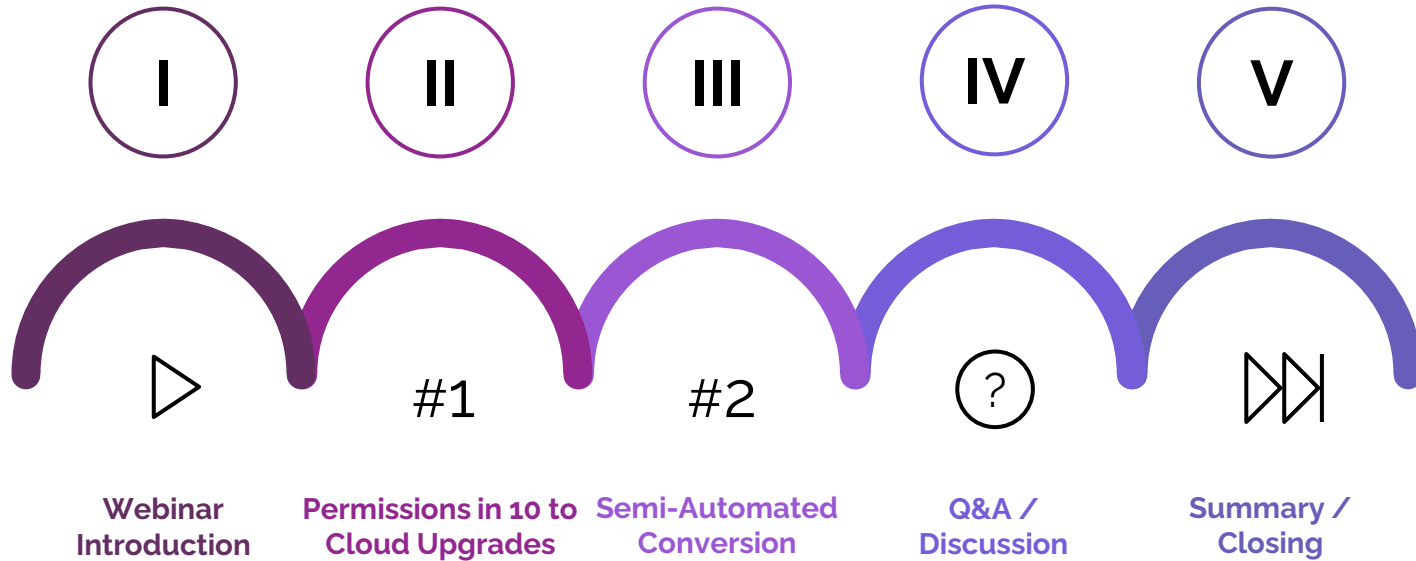
- Efficiency gains of 45% for routine tasks
- Acceleration of the initial set-up and testing due to templates
- Predefined reports for internal & external auditors
- Major reduction of effort when converting from IFS Apps 10 to IFS Cloud

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

- 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 in 10 to Cloud Upgrades

Topic 1

| # | Topic |
|---|--------------------------------------|
| 1 | Permissions as an Upgrade Workstream |
| 2 | The Model Shift: UI to API |
| 3 | Why Exports Don't Transfer |
| 4 | Greenfield vs Brownfield |



Authorization Gaps

Users can open pages but can't complete processes



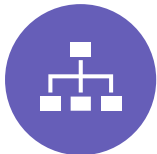
Structural Mismatch

Role structures don't carry over — Projections replace Presentation Objects



Hidden Coverage Gaps

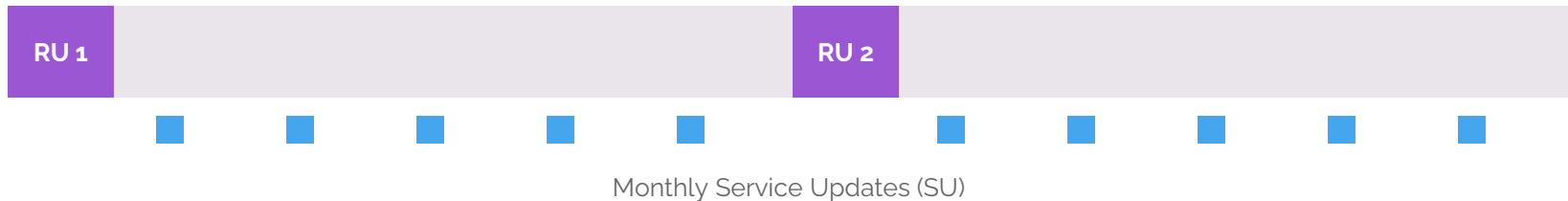
Everything worked in test, then broke in production because assistant/command-driven pages were missed



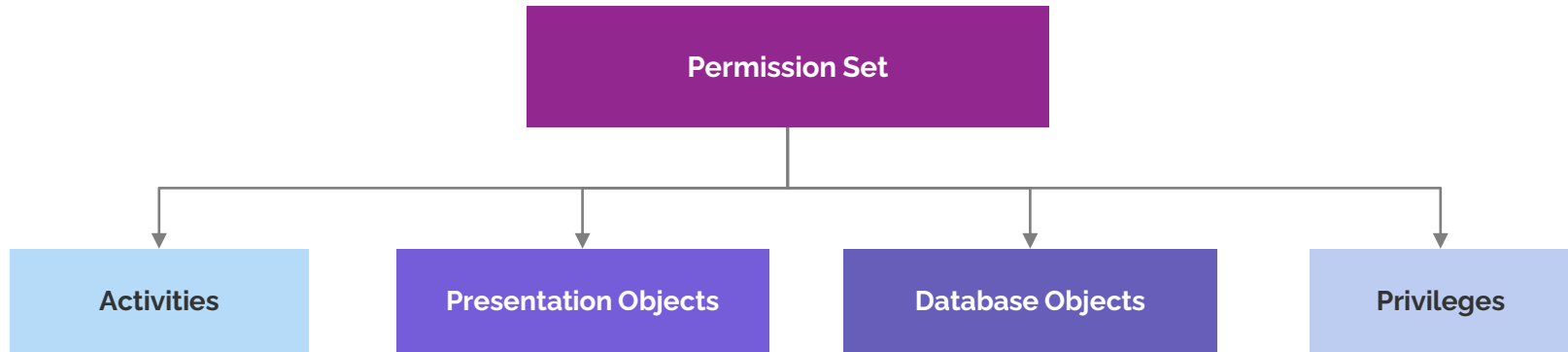
No Dedicated Workstream

Go-live permissions firefighting consumed weeks of unplanned effort

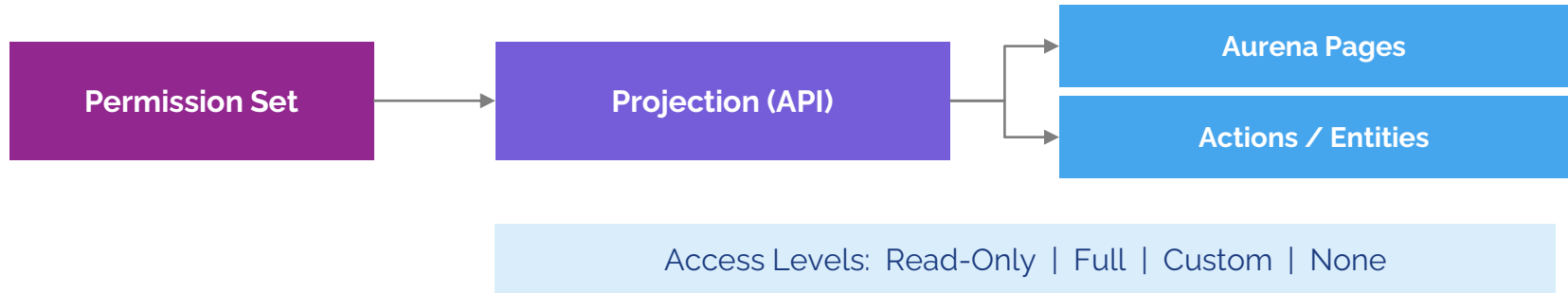
- IFS Cloud uses a **twice-yearly Release Update (RU)** cadence supported by **monthly Service Updates (SU)**
- Security must be governable continuously, not only at go-live – each RU/SU can introduce **new projections**, rename pages, or alter behavior
- Permission regression becomes part of evergreen governance – **high-risk roles and critical processes** need validation after every update



Focus regression on: critical business processes + high-risk roles + new/changed projections



- Permission sets are the **base unit** for administering authorities in IFS Applications
- Presentation Objects represent **UI parts (forms, tabs)** and simplify permission set maintenance by grouping underlying database objects
- Permission sets can be **exported/imported as XML** (useful for Apps-to-Apps migration, but not for Cloud)
- Security administration is strongly **tied to the UI layer**



- **Projections** are self-contained web APIs and the main point for security decisions in Cloud
- Granting a projection makes all **Aurena pages** using that projection available
- **Security** is enforced at the API layer, not at the UI layer as in Apps 10

2) Model Shift: Presentation Objects vs Projections

| Dimension | Apps 10 | IFS Cloud (Aurena) |
|-----------------------------------|--------------------------------|----------------------------------|
| Primary Security Unit | Presentation Objects (UI) | Projections (API) |
| What It Represents | Visual UI parts: forms, tabs | Self-contained web APIs |
| Permission Scope | UI components + DB objects | Data access + allowed actions |
| Access Levels | Grant / Grant query / no grant | Read-Only / Full / Custom / None |
| Where Security Is Enforced | Client-side UI layer | API / middleware layer (OData) |

1

Different security objects

Cloud uses **projections** and projection actions, **not presentation objects**. An Apps 10 export is built around legacy security objects that do not map 1:1 to Cloud grants.

2

Different granting behavior

Cloud pages are granted through projections. **Not all pages appear in the navigator** – some are only reachable through commands or workflows. An Apps 10 model built around the navigator will miss these flows.

3

Functional drift

IFS has renamed, removed, and added pages and projections in Cloud. There is **no guaranteed 1:1 copy** of Apps 10 role structures into Cloud.

Replace the "export/import" mindset with a "map / rebuild / validate" mindset

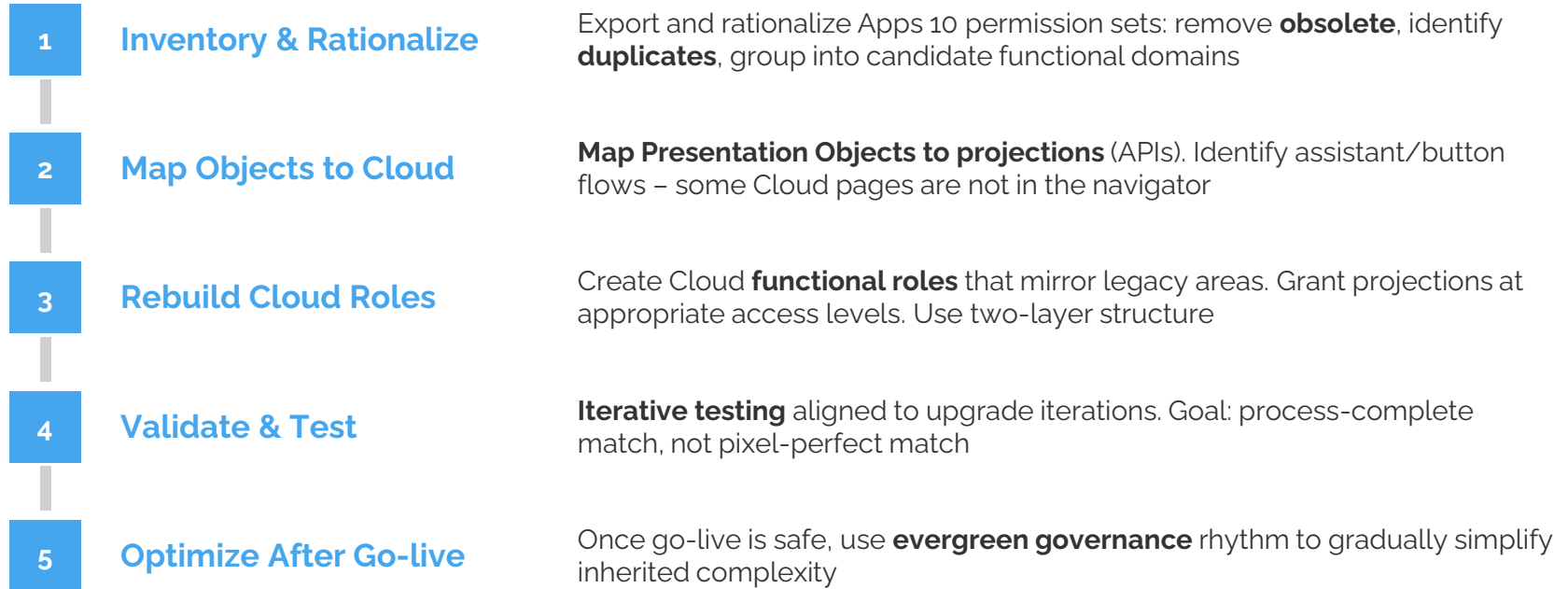
4) Greenfield vs Brownfield: Decision Factors

| 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 |

4) Greenfield vs Brownfield: Greenfield Approach

- 1 Role Discovery** Run workshops per business area to **define job roles** and core tasks
- 2 Structure Design** Define naming conventions, domain boundaries, **two-layer model**: functional roles → end user roles
- 3 Permission Construction** Build functional roles by **granting projections** with correct access levels (Read-Only / Full / Custom)
- 4 Controls-First Design** Embed **least privilege** and Segregation of Duties from day one – easier than retrofitting brownfield roles
- 5 Iterative UAT** **Test early**, fix, retest – include command/assistant-driven pages, not just navigator
- 6 Evergreen Handover** Define post-go-live **governance**: regression after every RU and selective SU cycles

Greenfield wins on long-term maintainability: modular role library that survives Cloud releases



Brownfield wins on speed-to-familiarity: users keep roughly the same role structure at go-live

4) Greenfield vs Brownfield: Common Surprises

| | Access Levels | Hidden Pages | Process Testing |
|---------|---|--|--|
| Symptom | Users can view but not execute actions, or vice versa | Process fails after a button click despite menu access working | Permission gaps discovered late, causing rework in iterations |
| Cause | Cloud distinguishes Read-Only / Full / Custom. Custom is triggered by partial action/entity grants. | Not all pages appear in the navigator – some are only reachable through commands or assistants | Permission validation must follow end-to-end processes, not only menu-based navigation |

Semi-Automated Conversion

Topic 2

Manual Workload

Converting Apps 10 permission sets to Cloud-compatible ones involves **extensive manual effort** without suitable tooling

High Volume

Instances often have **hundreds of permission sets**, making a manual conversion time-consuming and error-prone

Mapping Complexity

No clear mapping exists between IEE windows and Cloud projections – requires deep technical knowledge

New Features

IFS Cloud introduces renamed, removed, and **new projections** that have no direct Apps 10 equivalent

For companies choosing a brownfield approach, converting existing permission sets is a significant workload that benefits from automation.

Manual Brownfield Conversion

- Export Apps 10 permission sets manually
- Manually identify matching Cloud projections for each grant
- Rebuild every permission set from scratch in Cloud
- Research renamed, removed, and new IFS objects one by one
- Test, find gaps, fix, repeat across 300+ permission sets

Weeks to months of effort, error-prone, person-dependent

With Conversion Service

- Select Apps 10 permission sets in IPM
- Conversion engine maps and converts 70–80% of contents automatically
- Purple Services specialists complete the remaining grants
- Imported directly into target Cloud environment
- Expert consulting available on demand

Bulk of mapping automated, specialists handle the rest

Reduces Manual Effort

Automation handles the bulk of the mapping work. Your team focuses on validation and business decisions, not projection-level grunt work.

Handles Scale

Whether you have 100 or 500+ permission sets, the engine processes them consistently. Manual conversion at that scale is impractical.

Built on Real Mapping

Purple Services maintains a functional and technical mapping of Apps 10 to Cloud that reflects actual IFS changes across releases.

End-to-End Delivery

You provide access to your Apps 10 permission sets. You receive Cloud-ready permission sets in your Cloud environment – including manual completion and a verification consultation.



Permissions shift from UI objects to API projections is a structural change, not renaming



Apps 10 exports don't transfer to Cloud — map, rebuild, and validate instead



Greenfield vs Brownfield: depends on role quality, compliance, and timeline



Evergreen cadence means permission governance continues post-go-live



IPM can accelerate the conversion and simplify ongoing maintenance

Q&A / Discussion

Summary / Closing

- We showed why Apps 10 permissions **cannot simply be transferred to Cloud** and what the shift to projection-based security means for **upgrade strategy** (greenfield vs. brownfield).
- We explained why **brownfield conversion becomes a major workstream** and how structured, semi-automated mapping reduces effort and risk.
- We hope that you were able to get some **new insights and ideas**
- The next webinar is scheduled to take place on **30 April** at the same time. Invites will be sent out shortly. The topic is **LTU Permission Sets Contents & How to Benefit from Pre-Defined Roles**
- 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**



| | |
|------------------------------|---------------|
| DACH (Munich): | 10 March |
| France (Paris): | 2 April |
| Benelux (De Rijtuigenloods): | 8 April |
| Nordics (Gothenburg): | 23-24 April |
| UK & Ireland (Silverstone): | 29 April |
| Unleashed (Orlando): | 12-16 October |

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

