



Do business in every direction

Foundry Administrator Guide

Version 2.5.0.1



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Introduction

TrueCommerce Foundry is a responsive workspace environment that serves as principal login and user interface for the deployment of multiple integrated applications, data and resources.

This guide provides information about the different administrative responsibilities in the Foundry platform. For a quick summary of administrative roles and security settings, refer to the [Foundry Administration Overview](#) on page 12.

The intended audience of this guide is the TrueCommerce Foundry administrator. All described procedures require that you log on with either *Administrator* or *Security Administrator* account credentials.

Related Documentation

If you are not familiar with the Foundry user interface and want to learn about the layout and navigation, see [Online Help](#) on page 11. Note that there may be separate administrative tasks required for each of your licensed TrueCommerce products. Refer to your application-specific manuals for further details.

Navigating this PDF

This documentation is designed for on-screen viewing with interactive search and navigation capabilities.

Bookmarks

The bookmarks panel is a clickable *table of contents* on the left side of the PDF that provides quick navigation to anywhere in this document.

While this is standard feature in Acrobat Reader, you may need to activate bookmarks when using the native PDF reader of your browser.

Activating Bookmarks. In Chrome, click  *Document Outline*. In MS Edge, click  *Contents*.

Cross-References / Hyperlinks

Blue *hyperlinks* appear throughout the text wherever one topic references another. They also appear in generated lists, such as in the table of contents. In Acrobat Reader, you can also use the **Alt + Left Arrow** shortcut to jump back through previous hyperlinks.

Zoom

Use the zoom feature to enlarge text, screen shots and diagram details. Hold down the **Ctrl** key and use the *scroll wheel* (on your mouse) to zoom in or out of articles in the documentation.

Before you Begin

You must login to Foundry using the 'administrator' credentials provided to you by your TrueCommerce representative. This type of account is set up for configuring your applications and/or managing the accounts of all your users.

If you are new to TrueCommerce Foundry, following are the basics to get started:

- [Logging In](#), described below.
- [Navigating the User Interface](#), page 10
- [Online Help](#), page 11
- [Responsive Design](#), page 11.

Logging In

1. Enter the **Foundry** URL in your browser. The **Sign In** prompt displays.



Some organizations configure access to Foundry using a company-specific URL and single sign in prompt. The typical TrueCommerce Foundry URL and sign-in page is similar to the illustration above.

2. Do one of the following:

Basic Sign-In...

Type in your **User Name** and **Password** to complete the login. *Skip to step 7.*

Advanced Sign-In ...

Click the **Advanced View** control for the expanded list of login options. *Continue with step 3, next*

3. *Advanced View Only.* In the first drop-down field, select the method for validating the login:

Windows Authentication The system automatically logs you into Platform using your Windows username and password. No further username or password information is required.

Workspace Authentication The system uses the username and password associated with your TrueCommerce Foundry Platform user profile.

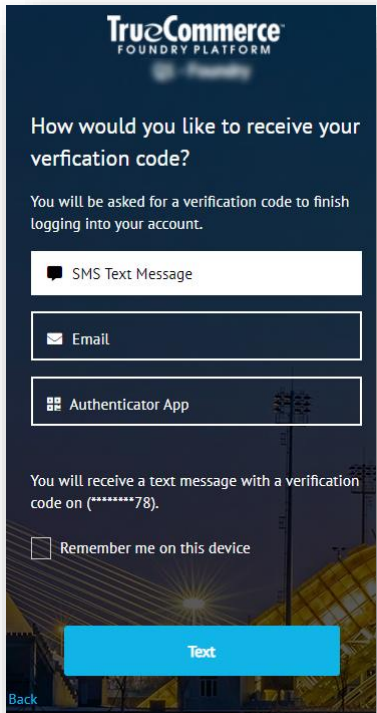
4. Type in your **User Name** and **Password**.
5. *Advanced View Only.* Type in your **Tenant**, if applicable.
6. *Advanced View Only.* In the last drop-down field, select the language in which you want the user interface to display.

If there is only one language, the system is always set to **Default**. If you added additional languages to your environment, **Default** assumes the language of your most recent Foundry session.

**NOTE**

Non-English languages are only available if you provide translations via [Localizations](#).

- Click the **Login** button. Authentication options display.



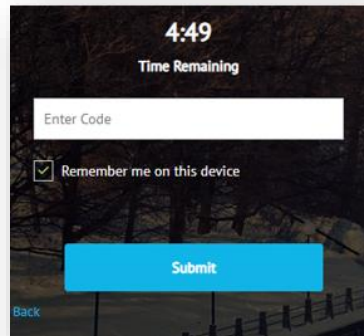
- Choose one of three methods to continue.

SMS - retrieve a validation code via the phone number listed in your user profile

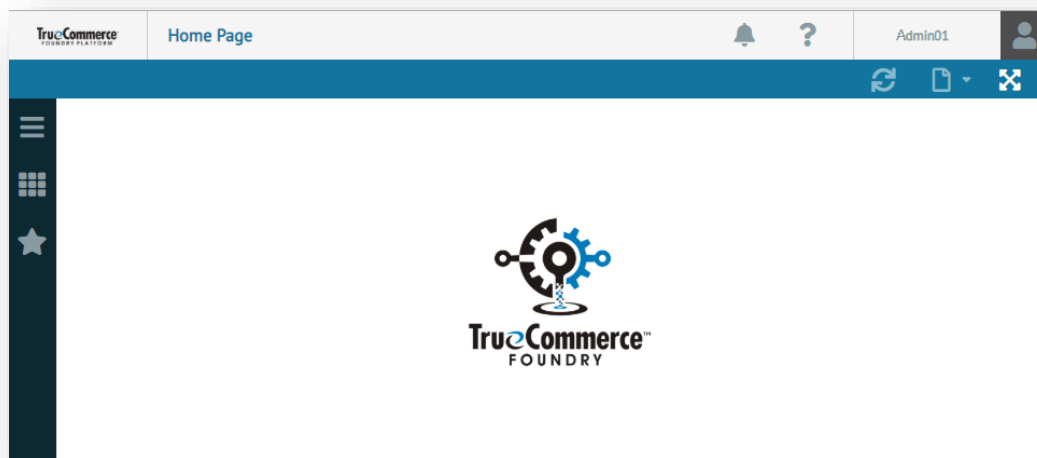
Email - retrieve a validation code via the email address listed in your user profile.

Authenticator App - retrieve a validation code via the authenticator app registered for your account.

The verification code text box displays.



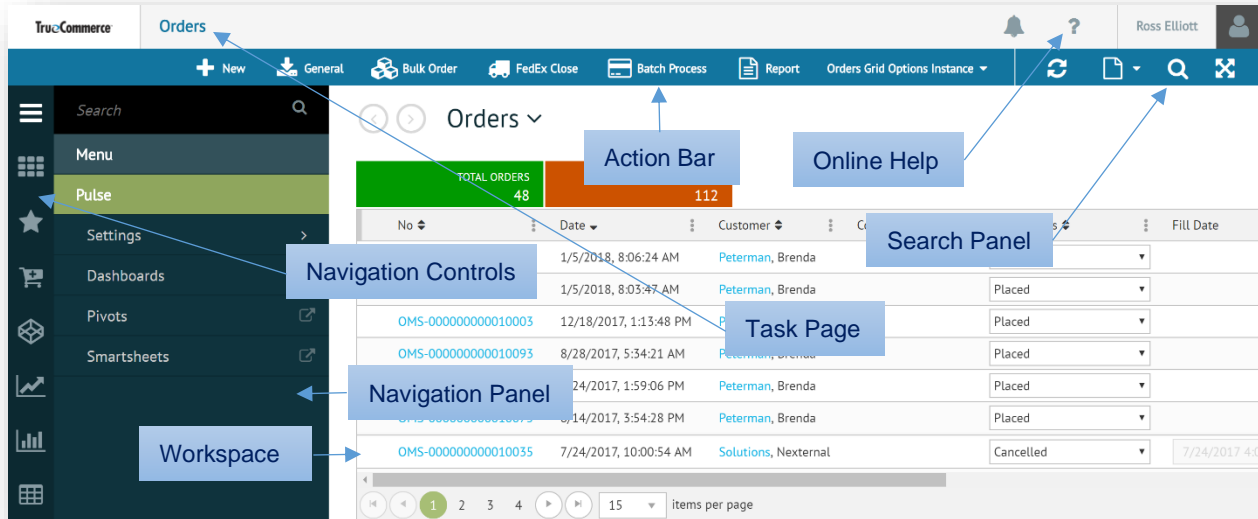
- Enter the code and click **Submit** to launch your **Home Page**:



Note that before your users can login and run their TrueCommerce applications, a Security Administrator must first authorize their access to Foundry as described under [Security and User Access](#) on page 12.











Navigating the User Interface

TrueCommerce Foundry is the common platform and user interface for all your TrueCommerce applications and task pages.



Common Functionality

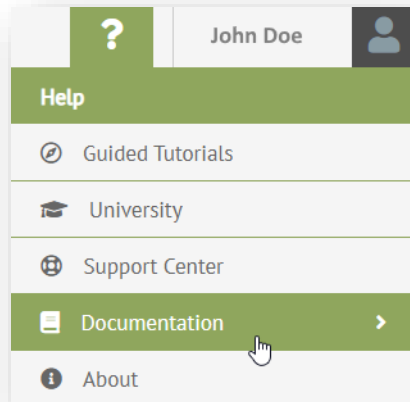
The layout and controls you see on each task page are dependent on the application; however, the overall navigation and display functionality will be the same no matter which application is running in the platform. Key features of the user interface include:

- The Foundry  navigation control opens the main **Menu** for access to your applications.
- Each menu link opens to a different task page under the selected application.
- A  symbol to the right of a menu link indicates a drop-down menu to more links.
- You can only work on one task page at a time in the Foundry workspace, but active pages may be saved to the background while you work on other pages.
- Click the  button next to the menu link to save a page to the background for access in the spaces menu.
- You can also set up  **Favorites** and *quick links* in the navigation panel for quick access to the pages you work with the most.
- The action bar contains all your application-specific buttons and controls.
- The  and  symbols on the action bar indicate a drop-down menu to more controls.
- If you need more room to work in a task page, use the  toggle to hide the navigation panel and page header from the Foundry workspace.
- To search, filter and organize what you see on a task page, click the  button.
- Event-triggered notifications are signaled by the on-screen  control. Application-specific notifications may appear as 'toast messages' at the bottom of your screen.
- To read more about Foundry, click the  button to invoke the online help menu, described below.

Online Help

If you need help with the platform user interface at any time during your Foundry session, click the **?** button, and then select **Documentation > Foundry User Interface** in the drop-down menu.

A variety of documentation and training options are available depending on your implementation and the TrueCommerce applications licensed under your tenant ID, including:



Guided Tutorials - walks through the steps, showing where to click or type, as you perform real tasks in the Foundry platform and within your applications.

University - launches the official TrueCommerce training site in a new browser tab.

Support Center - displays system notifications, queries issues and solutions, and connects you with customer support.

Documentation - invokes a drop-down menu for Foundry platform help and the most recent TrueCommerce product manuals for your implementation.

About - opens the **About** dialog for version details about Foundry and all the products licensed under your tenant.

Responsive Design

Foundry is optimized for multiple screen sizes via mobile phone, tablet, or desktop. The layout may be adjusted, where practical, based on the size and capabilities of the device. For example, on a smart phone, you may see content in a single column view; a tablet might show the same content in two columns. This also changes when devices are rotated to landscape mode.



NOTE

In this documentation, 'click' refers to the same action as 'tap' or 'touch' whether your device is equipped with trackpad, touch screen, or mouse-operated user interface.

Foundry Administration Overview

Administrators are responsible for the configuration, operation, and maintenance of their Foundry system, from managing user accounts to setting up TrueCommerce applications. This overview introduces you to the core concepts and administrative tasks in Foundry.

- [About Tenants](#), below
- [Security and User Access](#), page 12
- [System Roles](#), page 16
- [Administration Responsibilities](#), page 17

There are also unique administrative requirements for each of the TrueCommerce products you have licensed in Foundry. For more information, refer to the documentation associated with those applications.

About Tenants

Your TrueCommerce Foundry system and the applications that run on this platform are hosted on a multi-customer server, or 'cloud environment.' A TrueCommerce customer who can access Foundry is referred to as a named 'tenant'. This includes those with 'single sign-on' accounts. Tenants hold their own set of licenses for the Foundry platform, the Foundry-based products they purchased, and the number of users who can log in and use TrueCommerce products.

Partitioning of Foundry tenants is tightly controlled and secure. Users can only work with applications that are licensed by the tenant they log into. They can only access the resources and data to which they have been assigned, never another tenant or anything else installed on the hosted server. See below for more about [Security and User Access](#).

As administrator, you may come across references to a 'null' or 'central' tenant on certain configuration pages. This class of tenant is reserved for TrueCommerce service staff for product maintenance and development purposes only. See [Tenant](#), page 46.

Security and User Access

Foundry enforces strict security across tenants, by application, for groups, and at the individual user level. The platform authorization scheme allows Foundry tenants to license multiple integrated TrueCommerce applications and to manage access to resources and data for a variety of user accounts.

Your Foundry [Security Administrators](#) have tools to create user accounts and to determine which applications each user is permitted to access within your tenant. They can also monitor and control the number of concurrent Foundry platform and application [Sessions](#) available.

Pessimistic Policy. TrueCommerce maintains a 'pessimistic' security policy, where users will not be able to access anything unless explicitly granted by their *Security Administrator*.

Users and Roles

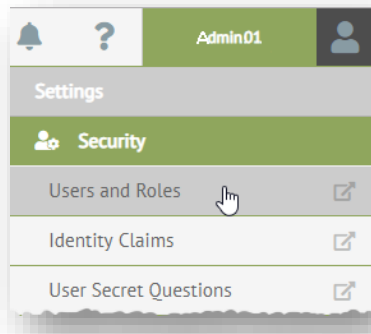
Authorization scenarios can be fairly complex depending on your implementation; however, once your [Application Settings](#) are in place, Foundry makes it very easy to maintain and replicate those settings across your user base. Security settings are established for different [Roles](#), and those Roles can then be assigned to any number of [Users](#) within your organization.

When it comes to Users and Roles, it is helpful to understand the following key concepts:

- Users are assigned one or more Roles to perform their work.
- Roles are configured to allow or deny access to specific applications, resources, and data.

- Users who have been assigned the same Role inherit all the security settings of that Role. When the settings are changed, they change for all Users with the same Role.
- You cannot change or delete [System Roles](#) but you can make copies, which in turn may be customized for a more specific purpose in your organization.
- Default Roles are often distributed with the applications you license. These would be for a generic implementation but you can make copies, which in turn may be customized for a more specific purpose in your organization.
- For security reasons, Users with multiple Roles will always inherit the *least privileged* access for the same authorization. For instance, a 'Deny' setting for an application feature in one Role overrides the 'Allow' setting placed by any other Role. The same policy applies to authorizations at the User level.

Following are the configuration pages for creating accounts and assigning access in Foundry.



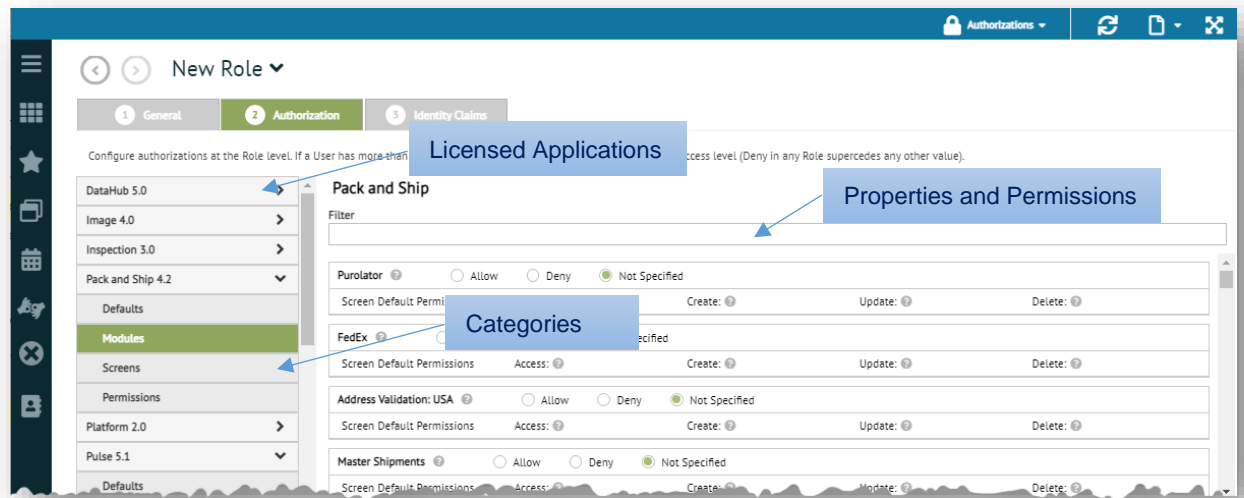
[Users](#). Assign login credentials and establish an initial profile. You can also assign one or more *Roles* to cover any application and security settings required.

[Roles](#). Authorize access to applications and apply *Identity Claims* to groups across your user base.

[Identity Claims](#). Create and configure application preferences specific to your implementation that can be enabled within Roles and, by extension, for any of the Users that have been assigned those Roles.

Application Settings

User access to all Foundry applications is defined via [Users and Roles](#). This section outlines the key [Properties](#) (task pages and features) for which [Permissions](#) must be granted.



The applications you license may include a set of preauthorized Roles that define 'generic' functionality for different types of users to perform their work. In addition to authorizations, you may need to use [Identity Claims](#) to configure certain aspects of the user experience for each application.

For documentation on the settings that apply specifically to the Foundry platform, see [Platform Settings](#) on page 43. See also [Administering Roles](#) on page 16.

Properties

When [Creating Roles](#), select an application on the **Authorization** panel, and then click on the **>** drop-down control to display the various properties for which authorization is required. Application properties are listed under the **Modules**, **Screens** and **Permission** categories, as described below.

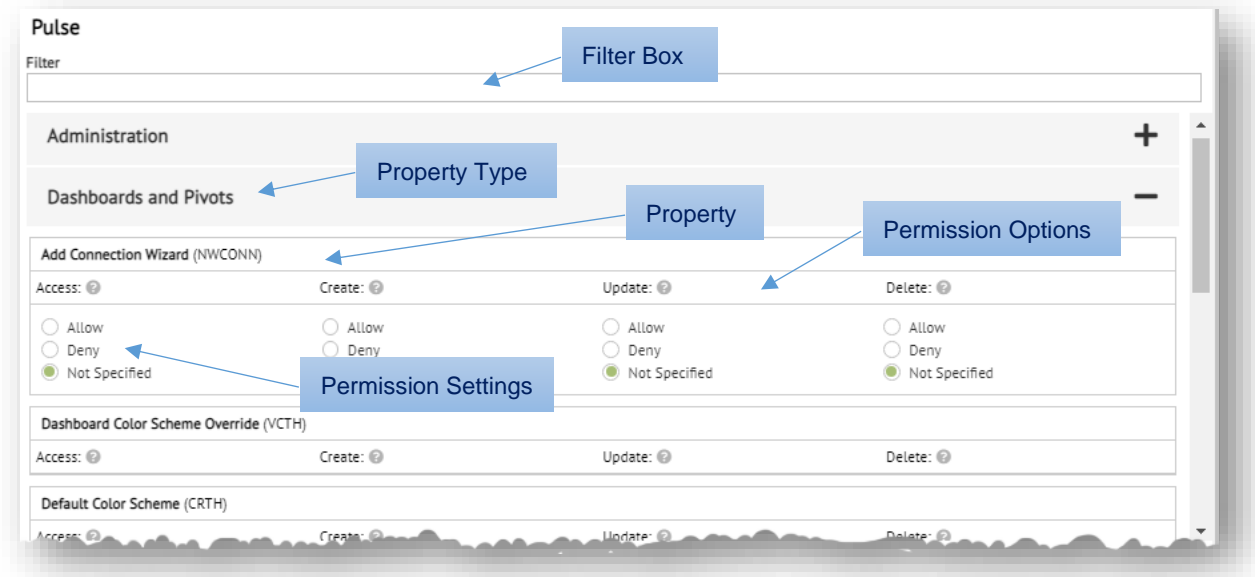
Table 1: Property Categories

Category	Description
Defaults	General settings under Application Permissions , Permission Defaults , and Screen Permissions .
Modules	Settings for separately licensed application modules, where applicable. Authorization is inherited by default, so user-specific settings may not be necessary.
Screens	Settings to access specific task pages in the application. Authorization is inherited by default, so user-specific settings may not be necessary.
Permissions	Custom settings for specific tasks and functionality, where applicable. Authorization is inherited by default, so user-specific settings may not be necessary.



NOTE

You can click **🔒 Authorizations** on the action bar to **🔒 Authorize Everything**, **🚫 Deny Everything**, or **? Inherit Everything** for the selected application.



Permissions

Select one of the [Property Categories](#) to see an application’s properties and the permissions for enabling those properties. If needed, click the **+** control on the property heading to expand the listed settings.

You can quickly locate specific properties using the **Filter** box at the top of the properties list. The search criteria you enter may be as simple as a single word (or even a partial word). Results appear in the property list as you type in the box.

Depending on the property, permissions may be limited to allow **Access** only, or it may also include the options to **Create**, **Update**, and/or **Delete**. Authorization is determined by the settings listed in Table 2.

Table 2: Permission Settings

Setting	Description
Allow	Permission is granted to access an application component or perform a task.
Deny	Permission is not granted to access an application component or perform a task.
Not Specified	Permission is automatically inherited from another source.

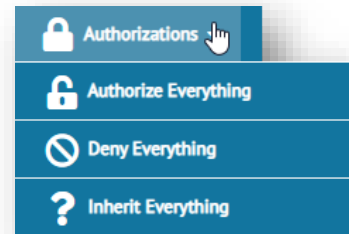


NOTE

By default, permissions are set to **Not Specified**, meaning **Allow** or **Deny** is automatically inherited from another source. However, if permission is **Not Specified** across *all sources*, **Deny** is assumed and Users will not be able to access those properties.

Optionally, you can click **Authorizations** on the action bar to **Authorize Everything**, **Deny Everything**, or **Inherit Everything**.

Depending on the application, it might be better to **Authorize Everything** and then **Deny** specific authorizations one at a time per your requirements. This helps prevent you from overlooking key components and functionality when you define a Role.



User Creation Tips

Foundry implementations may serve more than one type of User, where each requires different levels of access to applications, resources and data. Here are some tips for creating and managing new Users to ensure they include security settings for the purpose you intend.

Copy Users

When multiple Users are to be assigned the same set of Roles, try [Copying Users](#) to save time and effort.



CAUTION

Check for custom security settings before you commit to making a copy. You do not want a new user to inherit the wrong authorization by mistake. To ensure consistency, you can always [Create a Template](#) to copy from, described below.

Create a Template

Set aside one or more 'dummy' accounts in the [Users Page](#) to act as a *clean template* whenever you need to create identical copies of a particular class of User (basic, super user, manager, guest, etc.). This way, new Users copied from the template will always start out with the same Roles assigned to them. *The templates you create will not add to your tenant's user count unless someone logs in with them.*

Updating Existing Users

When [Editing Users](#) to expand their access to applications, data, and resources, look for existing Roles that are already configured with the authorizations you need. TrueCommerce applications may include preconfigured Roles to save you the time creating new ones yourself. Simply swap out the old Role for one that includes the security settings you require.

If you want to assign a new Role to multiple Users, go to the [Manage Users](#) grid, described on page 33. For more information about preconfigured Roles, refer to the documentation for those applications they are designed for. Otherwise, consult your TrueCommerce representative to see if any Roles have been set up for your implementation.

Administering Roles

As mentioned, the changes you make to a Role will be in effect for *all* Users that have been assigned that particular Role. Without careful planning, this can result in conflicting authorizations where recent changes override the settings in another Role (also true for custom User settings). Affected users can suddenly lose access to an application and/or be granted permissions they shouldn't have.

Following are some best practices to help avoid role conflicts:

- When creating or editing a User account, check for existing Roles that suit your intended purpose before attempting to create new ones “from scratch”. This prevents inconsistencies in your security settings, especially for more complex authorization and identity claims.
- When you have to create Roles, it is a good idea to authorize only one application per Role. Combining applications is *not recommended*, although some of the Roles provided by TrueCommerce may include components from multiple applications for integration purposes.
- Name (or rename) Roles to include the application (and functionality) in the description so they will be easier to identify on the [Roles Page](#).

Role conflicts can be hard to detect under certain circumstances. If you suspect there are Role conflicts, you may want to remove and reassign Roles using the [Manage Users](#) grid, described on page 33.

System Roles

As discussed in the previous section, some Roles come preset specific to your Foundry implementation. They may be default Roles that preauthorize a specific product, or *System Roles* that have been set up by TrueCommerce to be the starting point for different levels of access to Foundry.

The following System Roles are built into Foundry and cannot be deleted. Note that they are for Foundry ‘platform’ access only, so you will need to assign other Roles if you want Users to have access to your installed applications.

Security Administrators

Administrators who are assigned this Role are granted the highest level of security in Foundry. They assume all [Security Responsibilities](#) to create [Users and Roles](#) and to monitor [Sessions](#) in addition to the [General Responsibilities](#) of an administrator.

Administrators

Administrators who are assigned this Role can assume [General Responsibilities](#) but will not have access to any **Settings > Security** menu options.

Everyone

This Role grants the most basic login access to Foundry.

External

This Role grants external access to Foundry applications.

Administration Responsibilities

Administrator accounts are assigned [System Roles](#), either *Administrator* or *Security Administrator*. Both roles may be assigned to the same account. Most administrative pages are accessible via the **Settings** drop-down menu under your username / profile picture as listed in Table 3 and Table 4 below.

For quick reference, these responsibilities also correspond to topic locations in the documentation.

Table 3: Security Responsibilities

Responsibility	Menu Location and Description
Users	Settings > Security > Users and Roles > USERS Security Administrators can create Foundry login accounts and assign Roles for access to specific applications, data and resources. See also Users and Roles on page 12.
Roles	Settings > Security > Users and Roles > ROLES Define group settings for multiple Users to access various applications, data and resources. See also Users and Roles on page 12.
Sessions	Settings > Security > Sessions Monitor Users and their active connections under a given tenant.
Identity Claims	Settings > Security > Identity Claims Set preferences for TrueCommerce applications and access to resources specific to your implementation.
User Secret Questions	Settings > Security > User Secret Questions Create the list of security questions available to all your Foundry users.
Platform Settings	Settings > Security > Users and Roles > ROLES Define security and user interface access properties for your users specific to the Foundry platform itself.

Table 4: General Responsibilities

Responsibility	Menu Location and Description
Tenant	Settings > Setup > Configure Tenant Define companywide settings for security, services, application licensing, email, and the Foundry platform user interface.
Print Stations	Settings > Setup > Print Stations Install and define print stations so that your Foundry users can access local printers
Scheduled Tasks	Settings > Setup > Scheduled Tasks Create and launch selected tasks to run at scheduled intervals.
Localizations	Settings > Setup > Localizations Translate or rename screen headings, labels, and data fields for Foundry application interfaces, specific to your language and/or local preferences.
User Defined Fields	Settings > Setup > User Defined Fields Add your own fields to Foundry Applications.

Responsibility	Menu Location and Description
<u>Alert Subscriptions</u>	<p>Settings > Alert Subscriptions</p> <p>Set up system wide notifications for when specified events occur in your TrueCommerce Foundry applications.</p>
<u>Logs</u>	<p>Settings > Logs</p> <p>Open the Log Viewer to monitor or troubleshoot activities on your TrueCommerce Foundry system.</p>
<u>Quick Links</u>	<p>Settings > Quick Links</p> <p>Create quick links that appear on all your Foundry user accounts.</p>

Users

Your tenant's [Security Administrators](#) are responsible for creating and managing all your user accounts for login access to Foundry platform and the applications you have installed in Foundry.

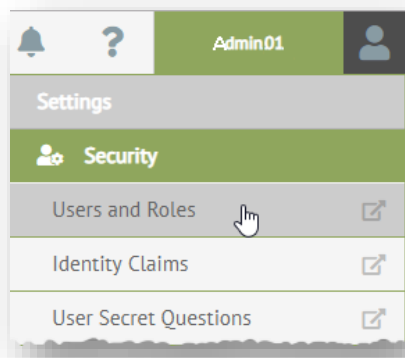
- [Users Page](#), below
- [Creating Users](#), page 20
- [Editing Users](#), page 24
- [Deleting Users](#), page 24
- [Copying Users](#), page 24
- [Downloading / Uploading User Files](#), page 25
- [Unlocking Users](#), page 26

For more on [Security and User Access](#) refer to the [Foundry Administration Overview](#), page 12.

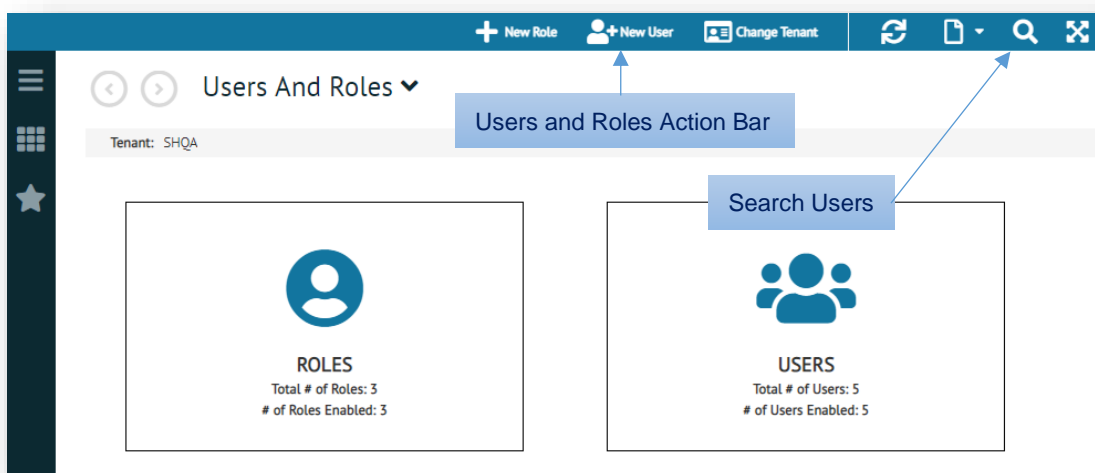
Users Page

User accounts are maintained via the **Users** ▼ page, which can be accessed by those who are assigned [Security Administrator System Roles](#). To access the **Users** ▼ page:

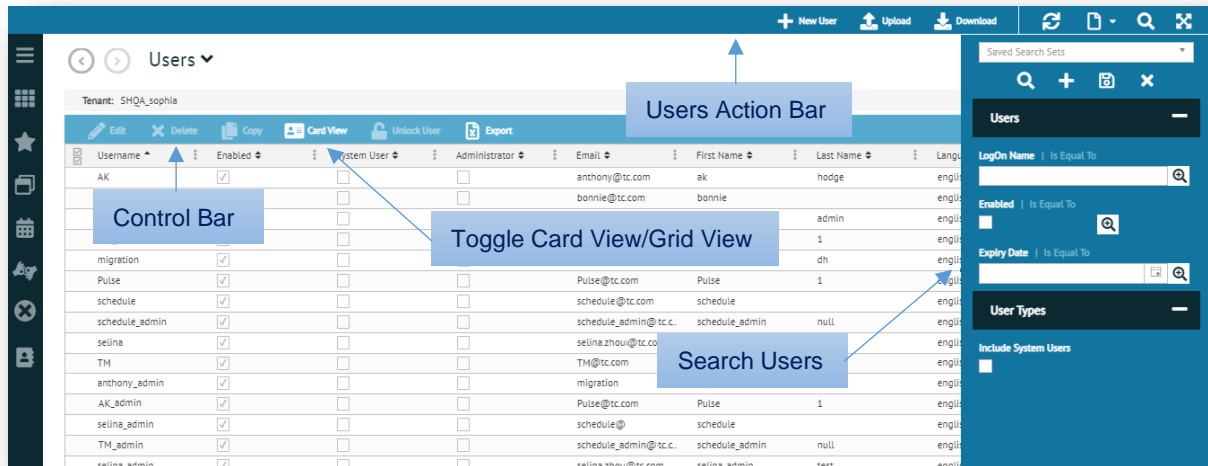
1. Click your username / profile picture on the top right corner of the Foundry page header.
2. Select **Settings > Security** from the drop-down menu.



3. Select **Users and Roles** from the drop-down menu to launch the **Users and Roles** ▼ page.



4. Select the **USERS** tile to open the **Users** page. From here, you can toggle between **Card View** and **Grid View**, illustrated below. **Card View** is required if you want to view the [User Summary](#). **Grid View** allows you to **Export** records from the grid to a spreadsheet file.



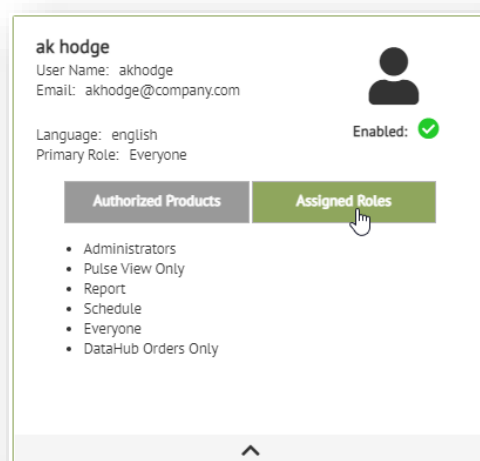
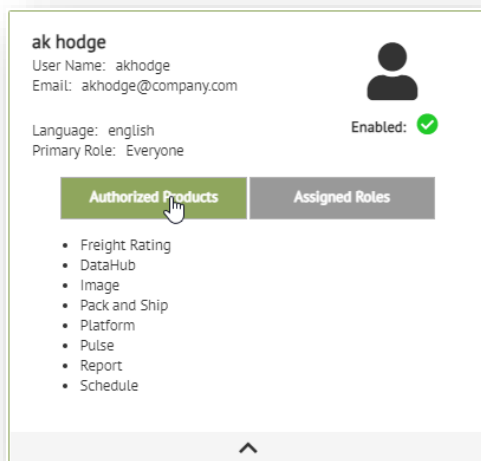
Search User Records

When you have several records listed on the [Users Page](#), you may need to search for the Users you want to edit, copy or delete. To locate specific user accounts, use the **Q** control on the **Users** action bar to access the search panel on the right side of the workspace. For more information on the search feature in Foundry, click the **?** button and select **Documentation > Foundry User Interface**.

User Summary


When the [Users Page](#) is in **Card View** you can access a drop-down summary of **Authorized Products** and **Assigned Roles** associated with the selected User.

Click the **▼** symbol to expand the summary. Select a tab to switch details. The products listed here may have been assigned via [Roles](#) or customized for this User in the [Authorization](#) panel.



Click the **▲** symbol to collapse the summary.

Creating Users


The most efficient method for creating users is by [Copying Users](#) that already have roles assigned for the purpose you intend. Otherwise, new users may be created via the **New User**  editor:


1. Open the [Users Page](#) and click **+ New User**. Alternately, you can click the  **New User** control directly on the **Users and Roles** action bar. The **New User**  editor will walk you through [General](#), [Roles](#), [Authorization](#), and [Identity Claims](#) panels for setting up a new user account.

General

2. Under **Profile Information**, fill in the **User Name**, **First Name**, **Last Name** and **Email** fields.
3. Under **Password**, fill in the **New Password** and **Confirm Password** fields.
4. Fill in any remaining details that may be required as per the field descriptions in Table 5.
5. Click **Next** to advance to the [Roles](#) panel. Otherwise, you can click **Finish** to exit the editor, which automatically assumes *default settings* for Roles, Authorization and Identity Claims.

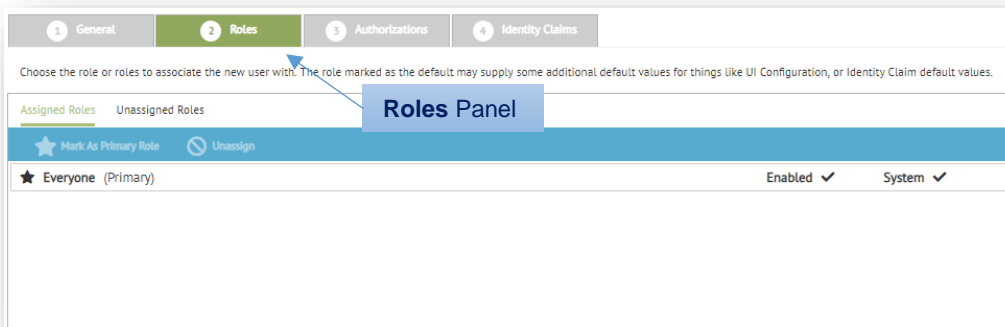
Table 5: User General Settings

Field	Description
Status	Toggle account activation.
User Name	<i>Mandatory.</i> Unique login username, registered once per tenant. Note that Email can be used as an alternate login (same password required).
Expiry Date	Sets a date for when this account is disabled. Click the  <i>calendar</i> control.
First Name	<i>Mandatory.</i> The first name of the user. <i>Can be changed by the user.</i>
Last Name	<i>Mandatory.</i> The last name of the user. <i>Can be changed by the user.</i>
Email	<i>Mandatory.</i> Unique email address; registered once per tenant. Can be used as an alternate to User Name for login (same password required).
Phone Number	Phone number of user for added security. <i>Can be changed by the user.</i>
Use HTML Email	Checkbox to indicate that this user can receive notifications as HTML. Otherwise, messages are sent using plain text.

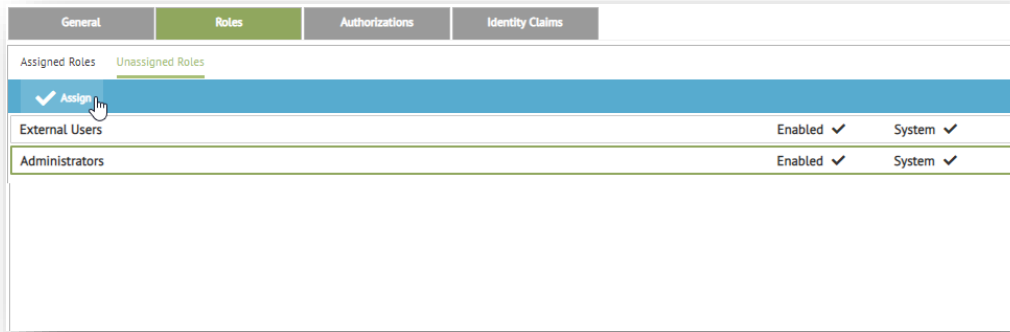
Field	Description
Profile Picture	Uploads the image (photo) that will appear alongside the User Name . <i>Can be changed by the user.</i>
Authentication	Type of authentication used to validate the user's login credentials. Foundry —User is required to enter the contents of their User Name and New Password fields in this form. Windows —Authentication via the user's Windows username and password. No further credentials required.
New Password	<i>Mandatory.</i> Sets the password required for access to Foundry when Authentication is set to Foundry . Note that password rules are configured under the Identity Claims panel.
Confirm Password	<i>Mandatory.</i> Verifies the password you enter in the New Password field matches the password entered in the Confirm Password field.
Force Change Password	Checkbox to indicate that the user will be forced to change their password upon next login once the password expires.
Language	Drop-down list of options for selecting the user's default language, if your system supports translation options.
Time Zone	Drop-down list of options for selecting the user's default time zone.
Inherit User UI	When in use, grid configuration, filter settings, and search sets will be inherited from the account selected. Click the  button to select a user from the grid, and then click OK .
Tenant	Tenant associated with the user. An account can only access applications related to this tenant.
Id	<i>System-generated.</i> Unique identifier for this account.
Service User Account	<i>Not Visible to Customers.</i> Checkbox to indicate that this an internal TrueCommerce account to be used for maintenance purposes only.

Roles

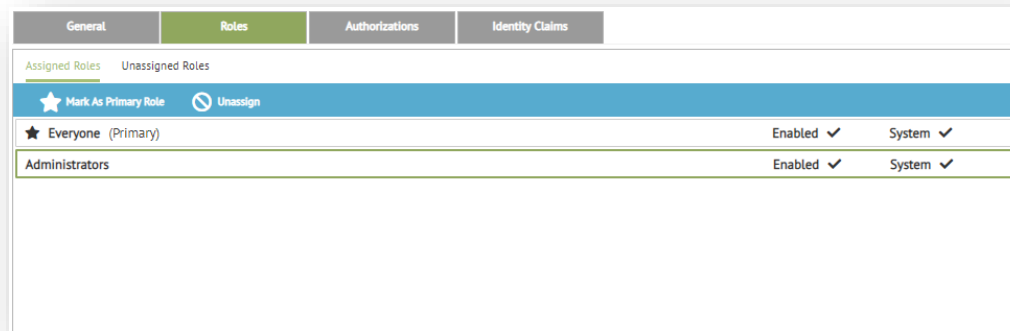
- On the **Roles** panel click on the **Unassigned Roles** tab to assign one or more [Roles](#) to a user. Assigning rebuilt Roles in this manner will minimize the need to customize [Authorization](#) and [Identity Claims](#) for individual users.



- Select a Role from the list and then click  **Assign** on the grid control bar. The Roles listed here are configured on the [Roles Page](#), which is documented on page 27.



The selected Role moves from **Unassigned Roles** to **Assigned Roles**.



8. *Optionally*, you can change the *Primary Role* by selecting a Role and then clicking **★ Mark as Primary Role** on the **Assigned Roles** grid control bar.
Primary Roles are used for identity claims and for **Inherit User UI** settings. Identity claims only apply to a user based on the primary Role and do not merge across Role assignments.
9. Click **Next** to advance to the [Authorization](#) panel. Otherwise, you can click **Finish** to exit the editor, which automatically assumes *default settings* for authorization and identity claims.

Authorization

10. Although not recommended, **Authorization** can be customized for individual users from what was established under their currently assigned [Roles](#). For example, you may need to extend some [Application Settings](#) on a temporary basis. Before you make changes to this panel at the user level, read the section on [Users and Roles](#) under the [Foundry Administration Overview](#), on page 12.
For more information, refer to the section on [Authorization](#) under [Creating Roles](#), page 30.
11. Click **Next** to advance to the **Identity Claims** panel. Otherwise, you can click **Finish** to exit the editor, which automatically assumes *default settings* for identity claims.



Identity Claims

12. Although not recommended, **Identity Claims** can be changed for individual users from what was established under their currently assigned [Roles](#). For example, you may need to extend some [Application Settings](#) on a temporary basis. Before you customize this panel at the user level, read the section on [Users and Roles](#) under the [Foundry Administration Overview](#), on page 12.
For more information, refer to the section on [Identity Claims](#), page 30.
13. Click **Finish** to exit the editor. The newly created user is added to the [Users Page](#).

Editing Users

Before you attempt to change existing user accounts, we recommend that you [Download](#) all your user records to local files. This ensures you have backups in case a recovery is needed.

To edit an existing user account:


1. Open the [Users Page](#) and select the user you want to edit.
2. Click  **Edit** on the card/grid control bar to launch the **Edit User** ▼ editor.
Note that the **New User** ▼ editor described under [Creating Users](#) is virtually identical to this editor except that some of the existing user's settings will already be filled in.
3. Update the necessary settings on the [General](#), [Roles](#), [Authorization](#), and [Identity Claims](#) panels.
4. Click  **Submit** on the action bar to exit the editor.

Changing Usernames

The username is typically tied to an email address and cannot be changed in the existing user record. The easiest way to “rename” a user is to copy the original account (to maintain the same authorization and assigned roles) and then save the copy under the new username. See [Copying Users](#), page 24.

Deleting Users

To delete a user:

1. Select the user you want to update on the [Users Page](#).
2. Click  **Delete** on the card/grid control bar.
3. When prompted, click the **Delete** button to confirm that you intend to delete the selected user.
The deleted user is removed from the [Users Page](#).

Copying Users


You can create a new user by making a copy of an existing account that already has the preferred [Roles](#), [Authorization](#), and [Identity Claims](#). Note that this is also the recommended option for changing a username.





CAUTION

Always check for custom authorization and identity claims that may have been changed at the user level before you commit to making a copy. See also [Create a Template](#), page 15.

To copy a user:

1. Open the [Users Page](#) and select the user you want to copy.
Click  **Copy** on the card/grid control bar. This launches the **New User** ▼ editor, described under [Creating Users](#).
2. Fill in all the [General](#) fields needed to create the new user and then click **Next** to advance.
3. The remaining panels contain the same settings as the user account that was copied. If you need to make some changes to the copy, you can update the required settings in the [Roles](#), [Authorization](#), and [Identity Claims](#) panels.
4. Click **Finish** to exit **New User** editor. The newly created user is added to the [Users Page](#).




Downloading / Uploading User Files

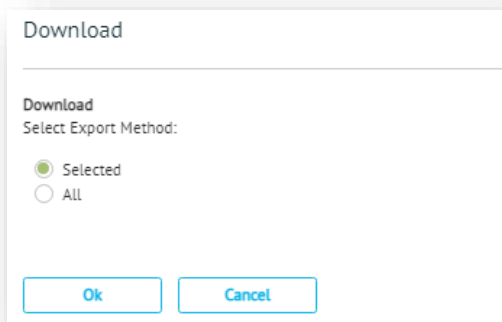
User configurations can also be backed up to files on a local computer via the  **Download** control. Note that this is not the same as the  **Export** control, which exports the grid to an XLSX file.

The steps to download and upload user configurations are provided below.

Download User File

To save user configurations to a file:

1. Switch from  **Card View** to  **Grid View** on the [Users Page](#).
2. Select one or more user records.
3. Click  **Download** on the action bar. The **Download** dialog displays.



4. Choose an export method and then click **OK**:

Selected

This downloads a single 'Selected User.ausers' file that contains configurations from each of the users selected on the [Users Page](#).



All

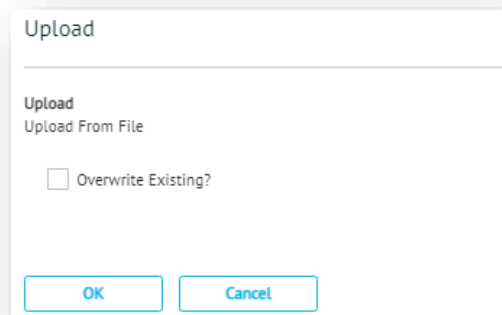
This downloads a single 'All Users.ausers' file that contains configurations from all the user records listed on the [Users Page](#).

5. Locate the 'downloads' folder used by your browser to retrieve the exported file on your computer.

Upload User File

To upload and retrieve user configurations from a file:

1. Switch from  **Card View** to  **Grid View** on the [Users Page](#).
2. Click  **Upload** on the action bar. The **Upload** dialog displays.




3. Select the **Overwrite Existing?** check box if you want existing users to be overwritten.
4. Click **OK**:
This launches your browser's **Open** dialog for retrieving an 'ausers' type file from your computer.
5. Locate and select a file with an 'ausers' extension and then click **Open**.
When the upload is complete, the imported users are added to the [Users Page](#).

Unlocking Users

As administrator, you have the ability to 'unlock' a user that has been locked out due to too many failed login attempts. Account lock out settings are maintained under Foundry identity claims

To unlock a user:

1. Select the user you want to unlock on the [Users Page](#).
2. Click  **Unlock User** on the card/grid control bar.
The selected user will be unlocked.

Roles

Roles allow [Security Administrators](#) to simplify permission management by assigning multiple [Users](#) with the same level of access to your applications, data and resources.

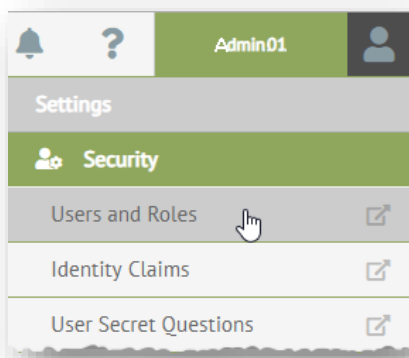
- [Roles Page](#), below
- [Creating Roles](#), page 28
- [Editing Roles](#), page 31
- [Deleting Roles](#), page 31
- [Copying Roles](#), page 32
- [Downloading / Uploading Role Files](#), page 32
- [Manage Users](#), page 33

For more on [Security and User Access](#) refer to the [Foundry Administration Overview](#), page 12

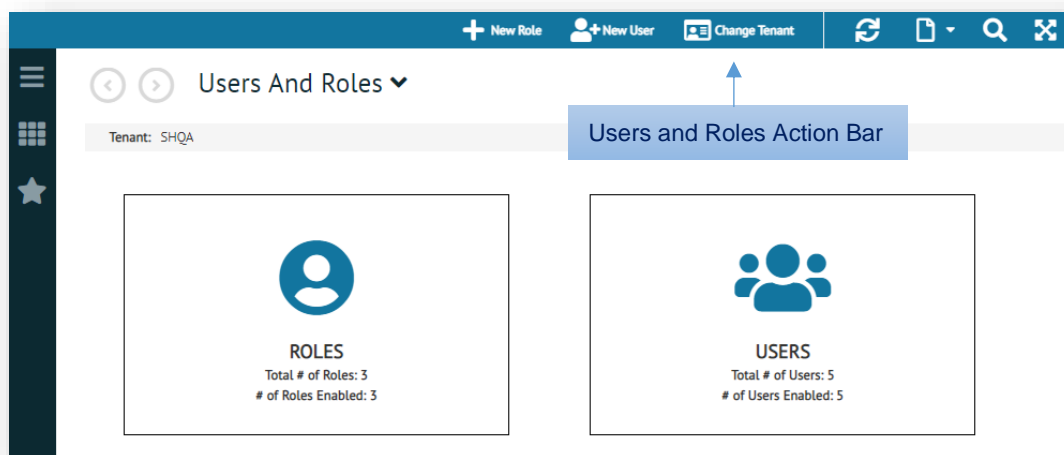
Roles Page

Roles are maintained via the **Roles** ▼ page, which can be accessed by those who are assigned *Security Administrator* [System Roles](#). To access the **Roles** ▼ page:

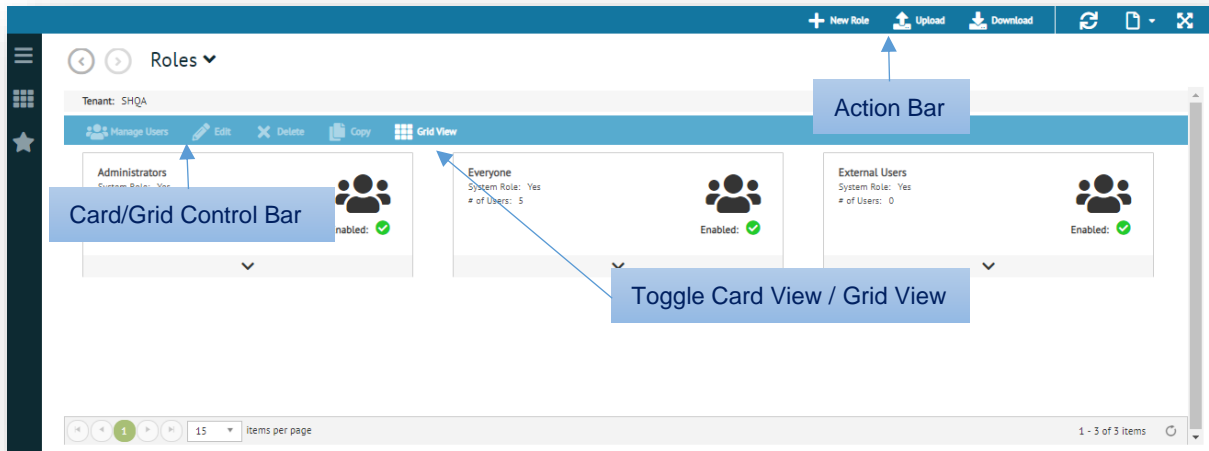
1. Click your username / profile picture on the top right corner of the Foundry page header.
2. Select **Settings > Security** from the drop-down menu.



3. Select **Users and Roles** from the drop-down menu to launch the **Users and Roles** ▼ page.



- Select the **ROLES** tile to launch the **Roles** page. From here, you can toggle between **Grid View** and **Card View**, illustrated below. **Card View** is required if you want to view the [Role Summary](#). **Grid View** allows you to **Export** records from the grid to a spreadsheet file.

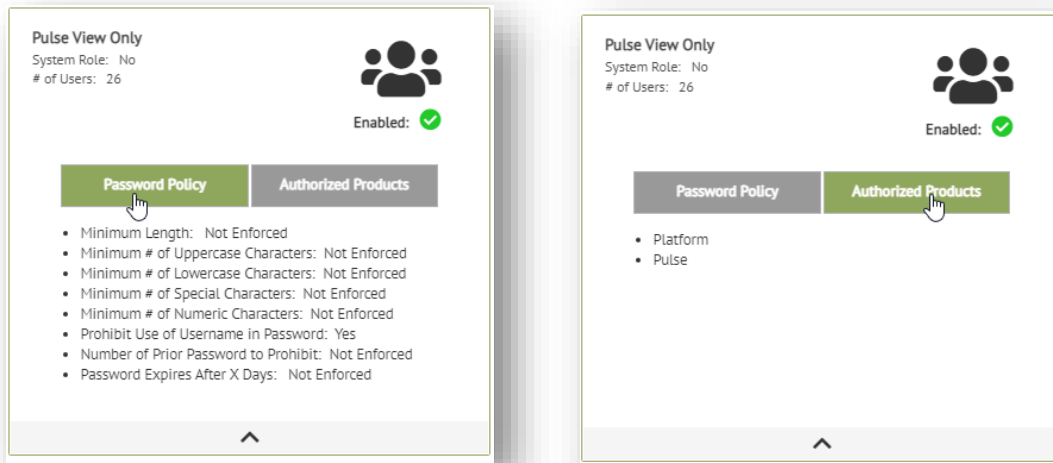


Note that the Roles listed here will be available for selection when [Creating Users](#).

Role Summary

When the [Roles Page](#) is in **Card View** you can access a drop-down summary of the associated **Password Policy** and **Authorized Products** of the selected Role.

Click the **▼** symbol to expand the summary. Select a tab to switch details.



Click the **▲** symbol to collapse the summary.

Creating Roles

The most efficient method for creating roles is by [Copying Roles](#) that are preconfigured with the necessary authorization and identity claims. Otherwise, new roles may be created via the **New Role** ▼ editor:

1. Open the [Roles Page](#) and click **+ New Role**. Alternately, you can click the **+ New Role** control directly on the **Users and Roles** action bar. The **New Role** ▼ editor will walk you through the [General](#), [Authorization](#), and [Identity Claims](#) panels for defining a new role:

General


The screenshot shows the 'New Role' editor with three tabs: 'General', 'Authorization', and 'Identity Claims'. The 'General' tab is active. Below the tabs, there is a instruction: 'Fill in the data as required in each section to create or update this role. Watch out for fields marked with an * as these are required.' The 'General' panel contains the following fields:

- Id**: 3c21c835-543f-103c-f192-d75b0b0502ed
- Tenant**: SHQA_bonnie1
- Description ***: An empty text input field.
- Enabled**: A checked checkbox.
- Inherit User UI**: A dropdown menu with a search icon and a refresh icon.

At the bottom of the panel are four buttons: 'Back', 'Next', 'Cancel', and 'Finish'.

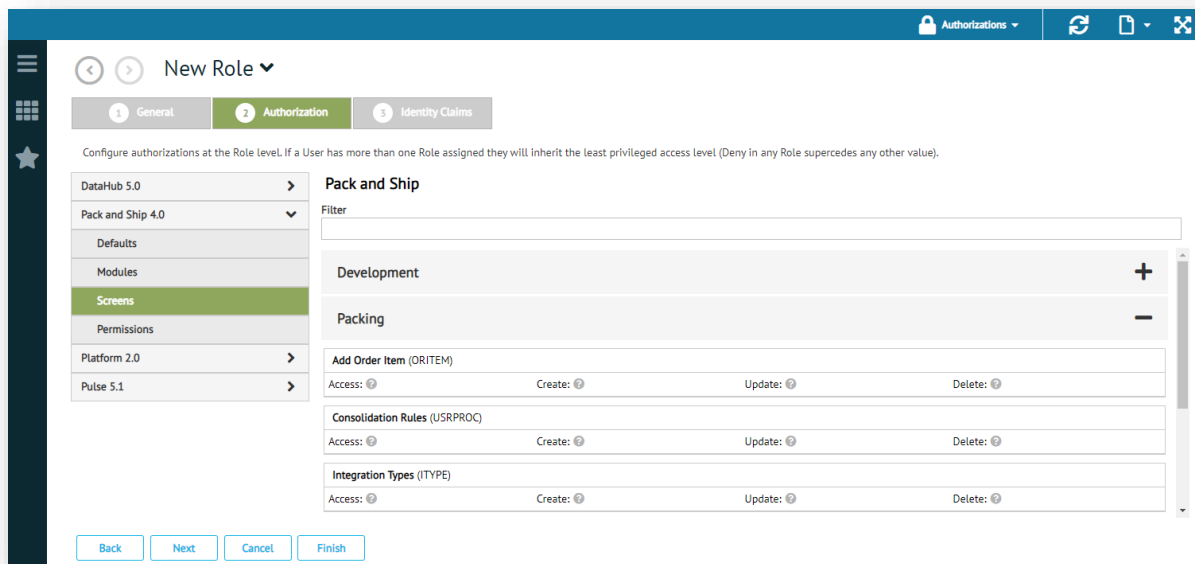
2. Fill in **General** details as per the field descriptions in Table 6.
3. Click **Next** to advance to the **Authorization** panel. Otherwise, you can click **Finish** to exit the editor, which automatically assumes *default settings* for authorization and identity claims.

Table 6: Role General Settings

Field	Description
Id	<i>System-generated.</i> Unique identifier for this Role.
Tenant	Tenant associated with the role. Users with this Role can only view applications that are associated with the tenant. Only the null tenant or central tenant of each environment can select a tenant from the drop-down list. All named tenants (everyone but the null tenant) see their respective tenant and the drop-down list as grayed out.
Description	<i>Mandatory.</i> Name of the Role. This description should identify which application and/or specific functionality will be authorized when Users are assigned this Role.
Enabled	Checkbox to activate the role for selection when Creating Users .
Inherit User UI	When in use, grid configuration, filter settings, and search sets will be inherited from the account selected. Click the  button to select a user from the grid, and then click OK .

Authorization

- Use the **Authorization** panel for settings that will apply to all Users assigned to this Role. Select an application from the menu, and then click on the **>** drop-down control to display the properties for which authorization is required.



- Click **Allow** or **Deny** to set [Permissions](#) for any of the [Properties](#) you need change. For more details, refer to [Application Settings](#) in the [Foundry Administration Overview](#), on page 13. For documentation on settings that apply specifically to the Foundry platform itself, see [Platform Settings](#) on page 43



NOTE

By default, authorization is set to **Not Specified**, meaning **Allow** or **Deny** is automatically inherited from another source. However, if authorization is **Not Specified** across *all sources*, **Deny** is assumed and Users will not have access to the application.

- Optionally, you can click **Authorizations** on the **New Role** action bar to **Authorize Everything**, **Deny Everything**, or **Inherit Everything**.
- Click **Next** to advance to the **Identity Claims** panel. Otherwise, you can click **Finish** to exit the editor, which automatically assumes *default settings* for identity claims.



Identity Claims

- Use the **Identity Claims** panel to select and enable any [Identity Claims](#) that may be required for this Role. Select an application from the menu, and then click on the **>** drop-down control to display the identity claims associated with that application.

For documentation on the identity claims that apply specifically to the Foundry platform (as opposed to applications that run in Foundry) see [Platform Settings](#) on page 43.

9. Complete the fields to apply any of the site preferences, ad hoc adjustments or supplemental logic that you may require for the selected application.
10. Click **Finish** to exit the editor. The newly created Role is added to the [Roles Page](#).

Editing Roles

If you need to customize roles, you should avoid editing them directly while they are in use. It is best to copy any active roles you need to change and then edit the copies, as described under [Copying Roles](#) on page 32. You can also [Download](#) roles to local files as an added precaution before attempting to make changes.

Any changes you make to an existing Role will affect any Users that have been assigned that Role.

To edit an existing role:

1. Open the [Roles Page](#) and select the role you want to edit.
2. Click **Edit** on the card/grid control bar to launch the **Edit Role** editor.

Note that the **New Role** editor described under [Creating Roles](#) is virtually identical to this editor, except that some of the existing role's settings will already be filled in.
3. Update the necessary settings in the [General](#), [Authorization](#), and [Identity Claims](#) panels.
4. Click **Submit** on the action bar to exit the editor.

Deleting Roles

Delete a role when it is no longer in use. If you delete a role assigned to existing users, the system removes the role from the user configuration.

To delete a role:


1. Select the user you want to update on the [Roles Page](#).
2. Click **Delete** on the card/grid control bar.
3. When prompted, click the **Delete** button to confirm that you intend to delete the selected role.

The deleted role is removed from the [Roles Page](#).

Copying Roles

You can create a new Role by making a copy of an existing Role that already has the preferred [Authorization](#) and [Identity Claims](#).

To copy a role:


1. Open the [Roles Page](#) and select the role you want to copy.
Click  **Copy** on the card/grid control bar. This launches the **New Role** ▼ editor, described under [Creating Roles](#).
2. Fill in all the [General](#) fields needed to create the new role and then click **Next** to advance.
3. The remaining panels contain the same settings as the role that was copied. If you need to make some changes, you can update the required settings in the [Authorization](#), and [Identity Claims](#) panels.
4. Click **Finish** to exit the **New Role** editor. The newly created role is added to the [Roles Page](#).

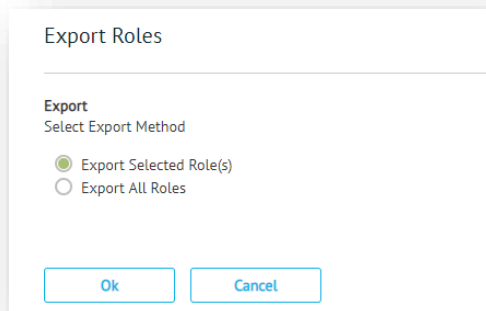
Downloading / Uploading Role Files

Your role configurations can also be backed up. The steps to export and import roles are provided below.

Download

To save role settings to a file:

1. If you are downloading specific settings, select one or more non-system roles on the [Roles Page](#).
2. Click  **Download** on the workspace action bar. The **Export Roles** dialog displays.



3. Choose an export method and **then** click **OK**:

Export Selected Roles(s)

This downloads a single 'Selected Roles' file that contains configurations from each of the roles selected in Step 1.


Export All Roles

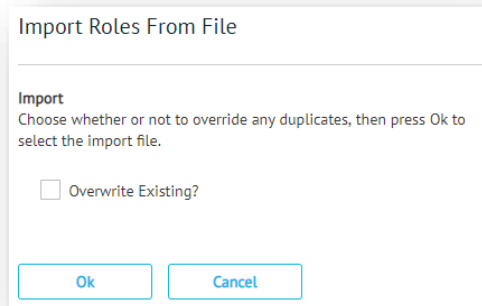
This downloads a single 'All Roles' file that contains configurations from all the non-system roles listed on the [Roles Page](#).

4. Locate the 'downloads' folder used by your browser to retrieve the exported file on your computer.

Upload


To import role settings from a file:

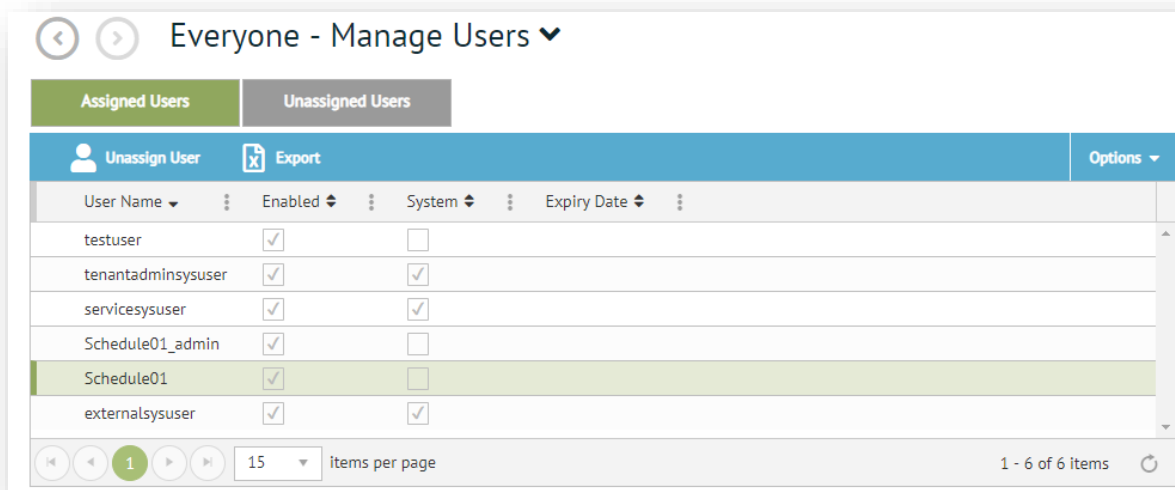
1. Open the [Roles Page](#) and click  **Upload** on the workspace action bar. The **Import Roles From File** dialog displays.





2. Select the **Overwrite Existing** check box if you want existing roles to be overwritten.
3. Click **OK**:
This launches your browser's **Open** dialog for retrieving an 'aroles' type file from your computer.
4. Select an 'aroles' file and click **Open**.
5. When the upload is complete, the imported roles are added to the [Roles Page](#).

Manage Users

The **Manage Users** grid lists all of the users that are currently assigned to a specific Role. It includes functionality to remove multiple users from the Role as well as add Users that are currently unassigned. To launch **Manage Users**, select a role on the [Roles Page](#), and then click  **Manage Users** on the card/grid control bar. All the users assigned to the selected role are listed under the **Assigned Users** tab.



Click  **Unassign User** under the **Assigned Users** tab to remove selected users from the role and place them under **Unassigned Users**. Once they are unassigned, those users will no longer have the attributes of that role. Note that you cannot remove users if that role is the only one assigned to them.

Click  **Assign User** under the **Unassigned Users** tab to assign selected (unassigned) users to the role, which moves them under **Assigned Users**.

Note that users can also be assigned/unassigned via the [Roles](#) panel when [Editing Users](#).

Sessions

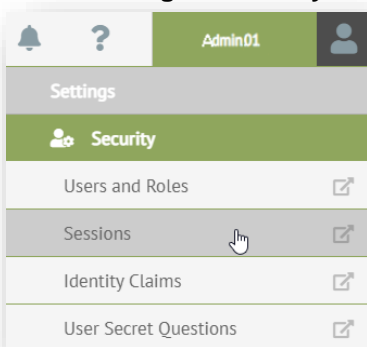
The **Sessions** page allows [Security Administrators](#) to monitor and maintain active Foundry sessions and all the connections that are currently in use on a per application basis for a given tenant.

- [Sessions Page](#), below
- [Connections](#), page 35
- [Managing Sessions](#), page 36

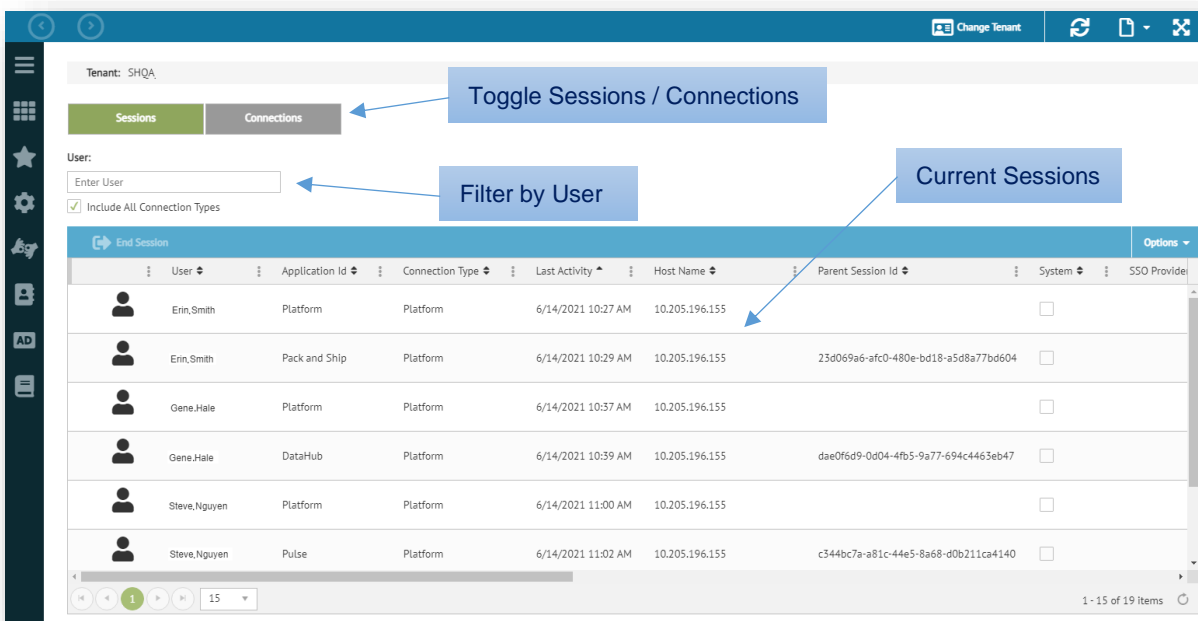
Sessions Page

Foundry sessions are managed from the **Sessions** ▾ page, which can be accessed by those who are assigned *Security Administrator* [System Roles](#). To access the **Sessions** ▾ page:

1. Click your username / profile picture on the top right corner of the Foundry page header.
2. Select **Settings** > **Security** from the drop-down menu.



3. Select **Sessions** from the drop-down menu to launch the **Sessions** ▾ page.



User	Application Id	Connection Type	Last Activity	Host Name	Parent Session Id	System	SSO Provider
Erin.Smith	Platform	Platform	6/14/2021 10:27 AM	10.205.196.155			
Erin.Smith	Pack and Ship	Platform	6/14/2021 10:29 AM	10.205.196.155	23d069a6-afc0-480e-bd18-a5d8a77bd604		
Gene.Hale	Platform	Platform	6/14/2021 10:37 AM	10.205.196.155			
Gene.Hale	DataHub	Platform	6/14/2021 10:39 AM	10.205.196.155	dae0f6d9-0d04-4fb5-9a77-694c4463eb47		
Steve.Nguyen	Platform	Platform	6/14/2021 11:00 AM	10.205.196.155			
Steve.Nguyen	Pulse	Platform	6/14/2021 11:02 AM	10.205.196.155	c344bc7a-a81c-44e5-8a68-d0b211ca4140		

Under the **Sessions** tab, the main grid lists all active sessions for each user as per the field descriptions in Table 7. See [Managing Sessions](#) for more information.

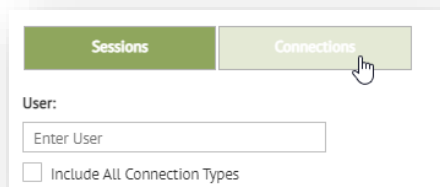
Table 7: Session Details

Field	Description
User	Foundry user in session. Enter a username in the User box to filter the list of sessions to a specific user.
Application ID	Application associated with the session. The 'Platform' application ID represents the initial login session for each user. Select Include All Connection Types to see the other applications they are using.
Connection Type	How the session was opened. All Foundry users connect via 'Platform'. Select Include All Connection Types to list other Connection Types .
Last Activity	Timestamp of the user's last activity.
Host Name	IP address of the connection.
System	Indicates if the session is a TrueCommerce System user.
SSO Provider	Provider ID if the session is a Foundry single sign-on account.
SSO Session	Session ID if the session is a Foundry single sign-on account.
Parent Session ID	Foundry platform session ID. This identifies the initial login session only when Include All Connection Types has been selected and there are multiple applications/sessions listed per user.
User ID	Unique ID for each user
Is Administrative Session	Indicates if the session is for TrueCommerce administrative purposes.

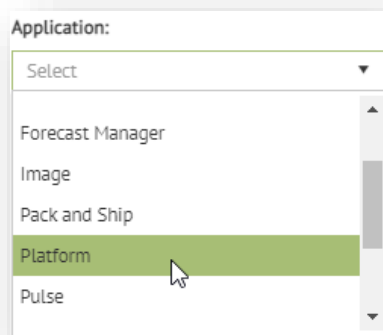
Connections

To see the number of connections associated with a specific application:

1. Click the **Connections** tab on the [Sessions Page](#).



2. Select an option from the **Application** drop-down field.



This populates the **Connections** grid as shown in the following example.

Connection Type	Total	Used	Available
Integration	5	0	5
Mobile	5	0	5
Platform	5	2	3
Service	5	0	5
Workspace	5	0	5

The connection type and the number of connections (**Total**, **Used**, and **Available**) are listed for the application selected. Only **Mobile** and **Platform** connections affect the simultaneous user count for a given tenant.

Table 8: Connection Types

Field	Description
Integration	System 'background' components, if applicable.
Mobile	Mobile app functionality.
Platform	Standard Foundry login sessions.
Service	TrueCommerce service users.
Workspace	TrueCommerce service users, legacy environment.

Managing Sessions

- You will need to click the *refresh* button to see the most recent session activity. Currently, there is no mechanism to refresh automatically.
- Sessions are directly related to the number of licenses purchased for a product, and will only allow the number of simultaneous users associated with those licenses.
- Each user is able to have multiple Platform sessions open within the same browser. This will allow them to open different applications in different windows at the same time. This can also be used to access different task pages from the same application without affecting the simultaneous user count.
- Some sessions remain listed even when they are not in use. This includes any task pages that have been added to the **Spaces** menu by the user.
- Use the **Connections** tab to monitor the number of individual connections for each application.
- Closing the main application ID (Platform) closes all the sessions for a given user.
- If needed, you can terminate a session by selecting **End Session** on the **Sessions** grid control bar. Ensure that you only close a session that is connected via 'Platform'

Identity Claims

Identity claims allow for site preferences, ad hoc adjustments or supplemental logic to be included with the Foundry applications you authorize for access in [Users and Roles](#). This section describes the functionality in Foundry that is available for configuring your own identity claims.

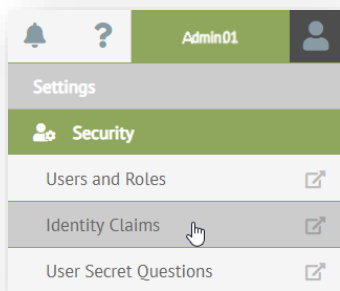
- [Identity Claims Page](#), below
- [Creating Identity Claims](#), page 38
- [Editing Identity Claims](#), page 39
- [Deleting Identity Claims](#), page 40

Note that identity claims can be *configured* with these settings but they must also be *enabled* via the [Identity Claims](#) panel and assigned to [Roles](#). If you need help creating identity claims, or you are unsure of their purpose, contact your TrueCommerce representative for assistance. For documentation on the identity claims that apply specifically to the Foundry platform (as opposed to applications that run in Foundry) see [Platform Settings](#) on page 43.

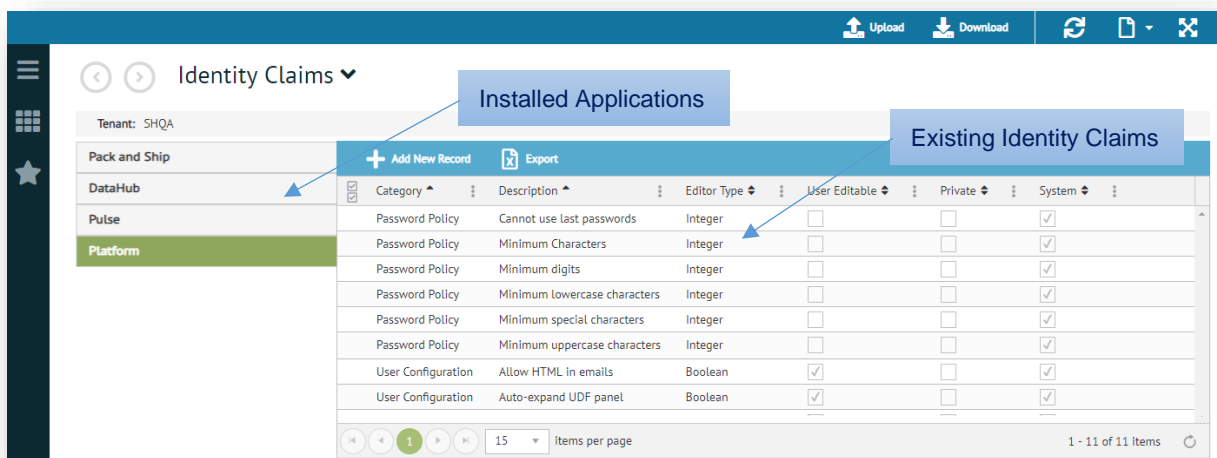
Identity Claims Page

Identity claims are created and maintained via the **Identity Claims** ▾ page, which can be accessed by those who are assigned *Security Administrator* [System Roles](#). To access the **Identity Claims** ▾ page:

1. Click your username / profile picture on the top right corner of the Foundry page header.
2. Select **Settings > Security** from the drop-down menu.



3. Select **Identity Claims** from the drop-down menu to launch the **Identity Claims** ▾ page.



4. Use the navigation menu on the left of the **Identity Claims** ▾ grid to access identity claims associated with each of the applications installed on your system.

Creating Identity Claims

To create an identity claim for a selected application:

1. From the [Identity Claims Page](#), select **+ Add New Record** on the grid control bar to launch the **New Identity Claim** ∇ panel.

2. Select the **General**, **Classification**, **Value** and **Access Control** drop-downs and fill in the remaining details as per the field descriptions in Table 9. Note that some field options are *cascading*, which means that the option you select in one field changes the list of options available in subsequent fields.

Table 9: Identity Claim Settings

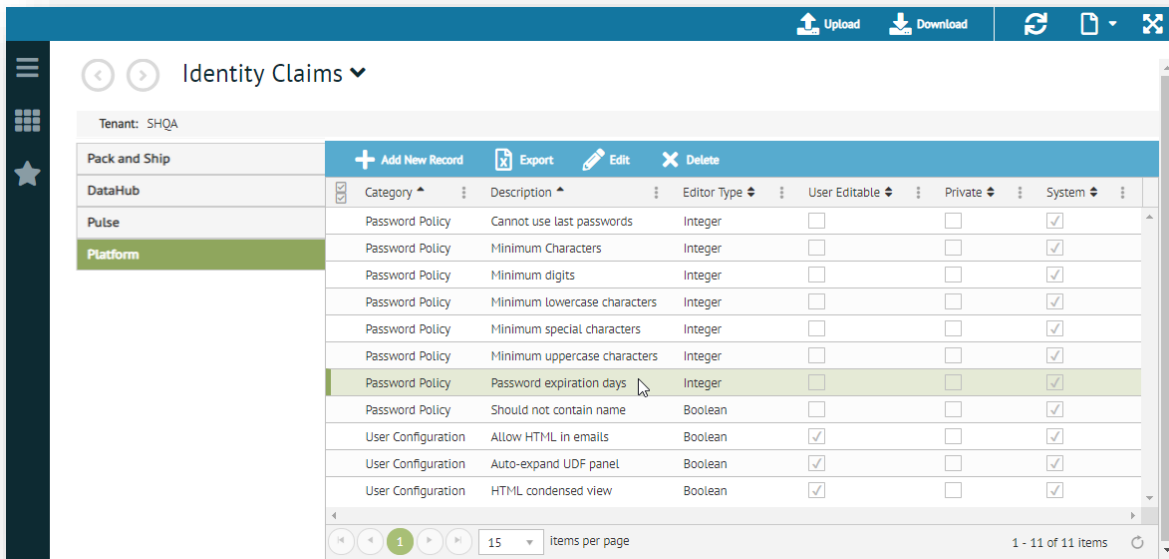
Field	Description
Id	<i>System-generated.</i> Unique identifier for this identity claim.
Application	<i>System-generated.</i> Name of application to which these settings apply.
Tenant	<i>System-generated.</i> Tenant associated with the identity claim.
Category	Classification that drives the identity claim hierarchy within the selected application.
Description	Name of the identity claim.
Tag	Label used by developers for locating predefined identity claims.
Data Type	Type of value for the identity claim, such as Text, Numeric Integer, Numeric Decimal, Boolean, etc. For more information, refer to the application's administrator guide.
Default Value	Default value for the identity claim.
User Editable	Check box to indicate that identity claim is editable by the user. When selected, this allows the user can see and edit the identity claim.

Field	Description
Private	Check box to indicate whether another application can see the identity claim. When selected, other applications cannot see the status of the identity claim.
System	Check box to indicate whether the system uses the following to validate values.
Required by System Roles	Values used by the system for the identity claim

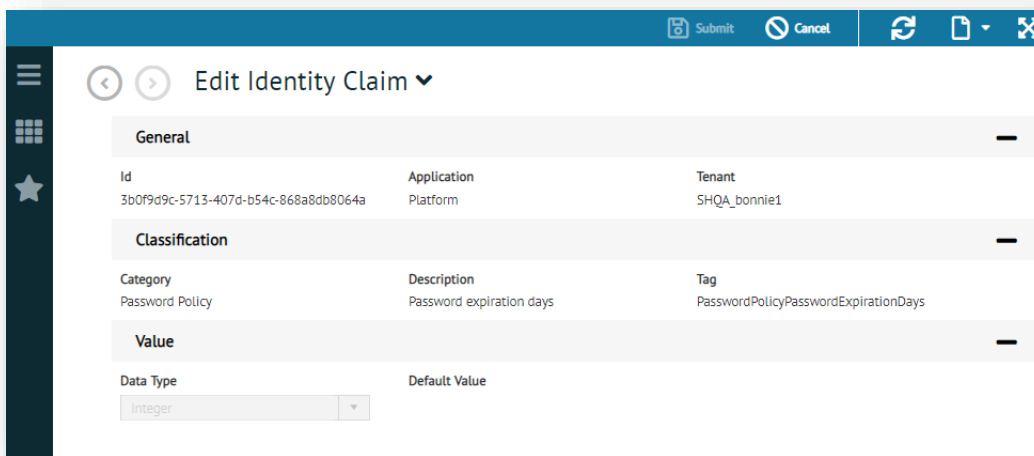
Editing Identity Claims

To edit an existing identity claim:

1. Use the navigation menu on the left of the [Identity Claims Page](#) to select the application for which you want to edit an identity claim. The application's identity claims grid displays.



2. Select the identity claim you want to update.
3. Double-click on the record or click **Edit** on the grid control bar to launch the **Edit Identity Claim** editor.



4. Select the identity claim you want to update.
5. Update the necessary fields as per the field descriptions in Table 9.
6. Click **Submit**.

Deleting Identity Claims

To delete an identity claim:

1. Use the navigation menu on the left of the [Identity Claims Page](#) to select the application for which you want to delete an identity claim. The application's identity claims grid displays.

Tenant: SHQA

Category	Description	Editor Type	User Editable	Private	System
Password Policy	Cannot use last passwords	Integer	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Password Policy	Minimum Characters	Integer	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Password Policy	Minimum digits	Integer	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Password Policy	Minimum lowercase characters	Integer	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Password Policy	Minimum special characters	Integer	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Password Policy	Minimum uppercase characters	Integer	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Password Policy	Password expiration days	Integer	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Password Policy	Should not contain name	Boolean	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
User Configuration	Allow HTML in emails	Boolean	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
User Configuration	Auto-expand UDF panel	Boolean	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
User Configuration	HTML condensed view	Boolean	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

1 - 11 of 11 items



2. Select the identity claim you want to delete.
3. Click **Delete** on the grid control bar.
4. When prompted, click the **Delete** button to confirm that you intend to delete the selected identity claim. The deleted identity claim is removed from the grid.

User Secret Questions

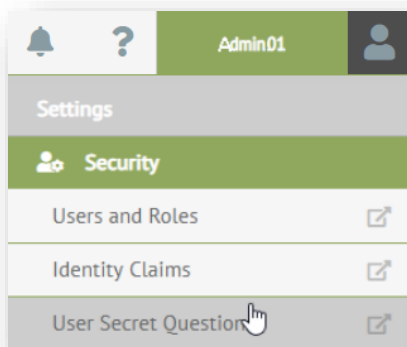
Secret questions are required for users to reset their passwords. The questions display when the user selects **Secret Questions** under their **My Profile** menu. Note that the number of questions asked is determined by the **Force Secret Questions #** setting on the [Tenant Configuration Page](#).


- [User Secret Questions Page](#), below
- [Creating User Secret Questions](#), page 42
- [Editing User Secret Questions](#), page 42
- [Deleting User Secret Questions](#), page 42

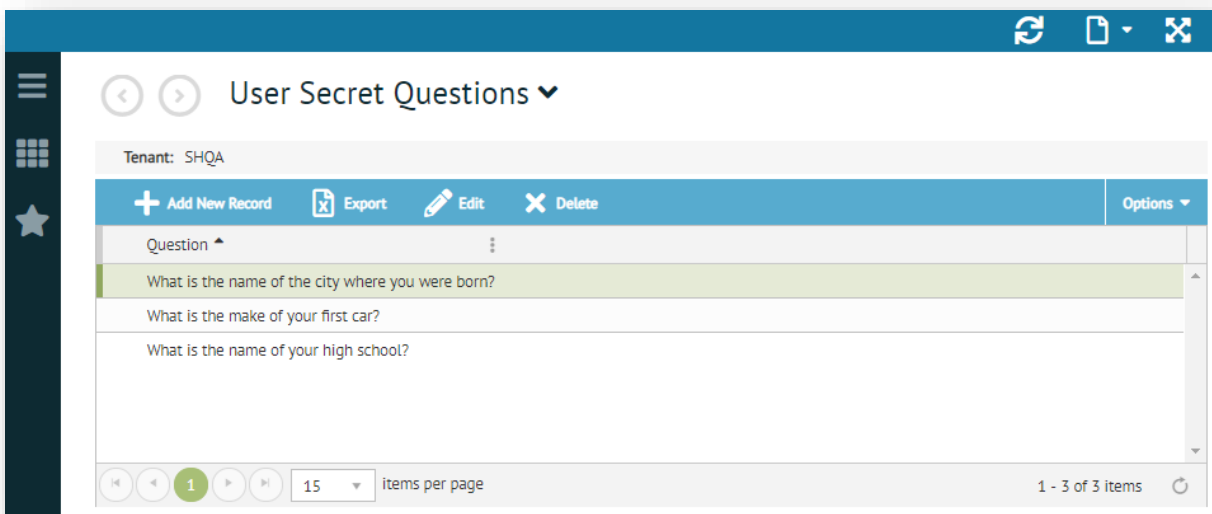
User Secret Questions Page

You can create and maintain the list of questions for your system via the **User Secret Questions**  page, which can be accessed by those who are assigned *Security Administrator* [System Roles](#). To access the **User Secret Questions**  page:

1. Click your username / profile picture on the top right corner of the Foundry page header.
2. Select **Settings > Security** from the drop-down menu.



3. Select **User Secret Questions** from the drop-down menu to launch the **User Secret Questions**  page.



Creating User Secret Questions

To create a list of secret questions:

1. From the [User Secret Questions Page](#), select **+ Add New Record** on the grid control bar. This opens a new blank line on the grid.

2. Type in a question and press **Enter** to add the question to the list.
3. Repeat until your question list is complete.

Editing User Secret Questions

To edit a question:

1. From the [User Secret Questions Page](#), select the question you want to edit.
2. Double-click on the record or click **Edit** on the grid control bar to make the selected question editable.
3. Update the selected question.
4. Click **Save** on the grid control bar.

Deleting User Secret Questions

To delete a question:

1. From the [User Secret Questions Page](#), select the question you want to delete.
2. Click **Delete** on the grid control bar.
3. When prompted, click the **Delete** button to confirm that you intend to delete the selected question. The deleted question is removed from the grid.

Platform Settings

Much like other TrueCommerce products, the Foundry platform includes its own [Application Settings](#) for defining [Users and Roles](#). [Platform Authorization](#) determine access to specific task pages, features, and functionality. [Platform Identity Claims](#) allow you to configure aspects of the user experience in Foundry.

Platform Authorization

Security Administrators can change platform specific settings for their Users by selecting the 'Platform' > drop-down on the [Authorization](#) panel when creating or editing [Roles](#). Table 10 lists all the [Properties](#) in the Foundry platform for which [Permissions](#) must be granted to access or use.

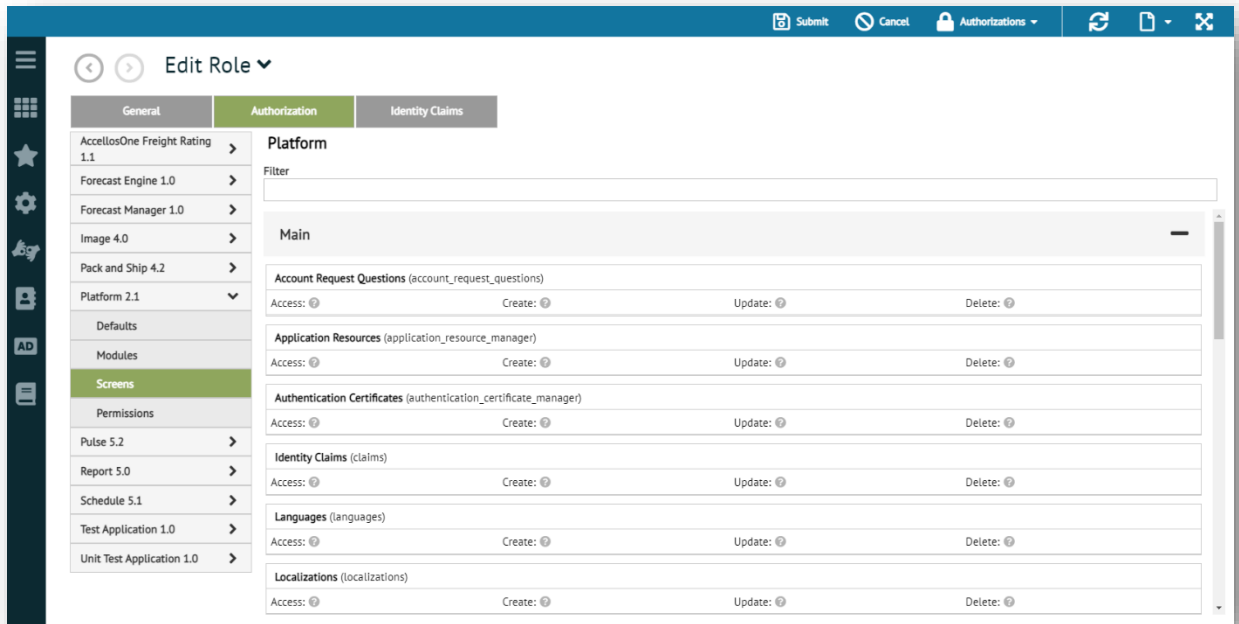


Table 10: Platform Authorization

Category	Properties
Modules	<ul style="list-style-type: none"> • Live Support Chat • Development Tools • Main
Screens	<p>Main</p> <ul style="list-style-type: none"> • Account Request Questions • Application Resources • Authentication Certificates • Identity Claims • Languages • Localizations • Logs • Logs Management • Mobile Screens • Network Mutexes

Category	Properties
	<ul style="list-style-type: none"> • Plugins • Print Stations • Scheduled Tasks • Service Screens • Sessions • System Configuration • Tenant • User Defined Fields • User Secret Questions • Users and Roles • Web Help
Permissions	<ul style="list-style-type: none"> • Permissions Default State <i>User Interface</i> <ul style="list-style-type: none"> • Access Workspace Full Application Menu • Advanced Filtering • Allow Add Dock Windows • Allow Close Dock Windows • Configure Alert Subscription Query • Configure Alert Subscription Templates • Configure Alert Subscriptions • Configure Identity Claims Inherited From Role • Configure UI Preferences • Configure UI Preferences Inherited From Role • Configure Workspace Screen Link • Customize Workspace Application Menu • Edit Advanced Filters • Edit Query Filters • Edit Query Filter Sets • Modify Custom Permissions • Modify Screen Layout • Modify Workspace <i>Workflows\Alertable</i> <ul style="list-style-type: none"> • Alertable Workflow

Platform Identity Claims

Security Administrators can enable Foundry platform specific identity claims for their users by selecting the 'Platform' > drop-down on the [Identity Claims](#) panel when creating or editing [Roles](#). Table 11 lists the identity claim parameters used to configure the platform user experience.

Table 11: Platform Identity Claims

Category	Field
Account Lockout	<ul style="list-style-type: none"> Duration (minutes) Reset Counter After (minutes) Threshold (attempts)
Multiple Selection	<ul style="list-style-type: none"> Multiple selection
Password Policy	<ul style="list-style-type: none"> Cannot use last passwords Minimum Characters Minimum digits Minimum lowercase characters Minimum special characters Minimum uppercase characters Password expiration days Should not contain name
User Configuration	<ul style="list-style-type: none"> Allow HTML in emails Auto-expand UDF panel Auto-hide Navigation panel External Id HTML condensed view Idle Timeout (minutes)

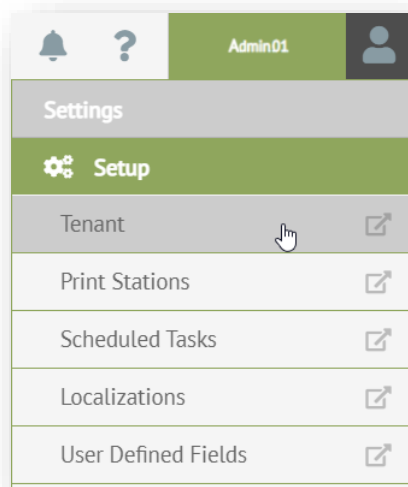
Tenant

Every customer that has access to Foundry on the same hosted server is referred to as a 'tenant'. See [About Tenants](#) on page 12. At the tenant level, administrators are able to define various organizational settings for services, application licensing, email, and the Foundry user interface.

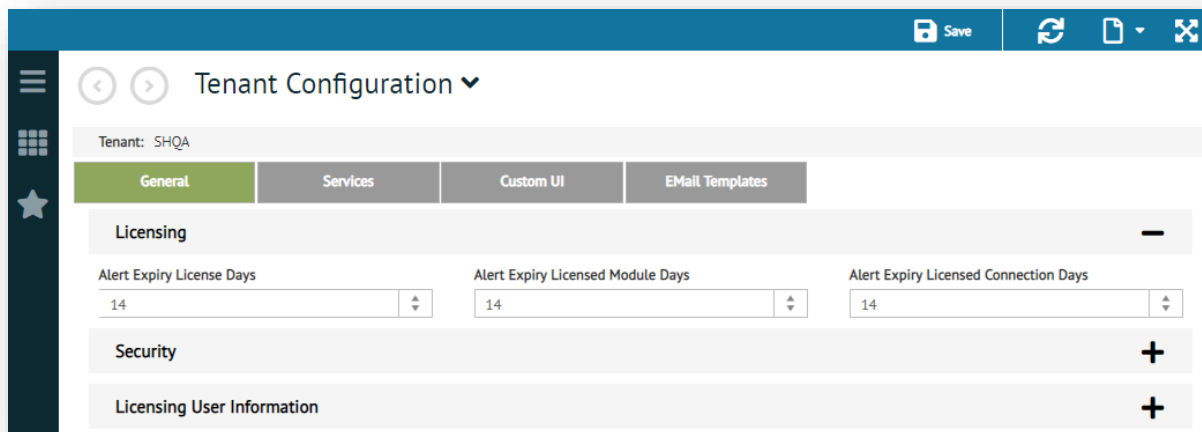
Tenant Configuration Page

Tenant settings are located on the **Tenant Configuration** ▼ page, which can be accessed by those who are assigned Administrator [System Roles](#). To access the **Tenant Configuration** ▼ page:

1. Click your username / profile picture on the top right corner of the Foundry page header.
2. Select **Settings > Setup** from the drop-down menu.



3. Select **Tenant** from the drop-down menu to launch the **Tenant Configuration** ▼ page.



4. Use the tabbed panels on the **Tenant Configuration** ▼ page to access various settings under the [General](#), [Services](#), [Custom UI](#), and [Email Templates](#) panels, as documented below.
5. When your tenant configuration is complete, click **Save** on the action bar.

General

The **General** panel comprises three collapsible sections for **Licensing**, **Security** and **Licensing User Information**. Expand each of the sections and fill in the details as per the field descriptions in Table 12.

The screenshot shows the 'Tenant Configuration' interface for tenant 'SHQA_bonnie1'. It features a navigation bar with tabs for 'General', 'Services', 'Custom UI', and 'Email Templates'. The 'General' tab is active and contains three collapsible sections: 'Licensing', 'Security', and 'Licensing User Information'. Each section has a minus sign icon on the right for collapsing. The 'Licensing' section is expanded, showing three input fields: 'Alert Expiry License Days' (value: 14), 'Alert Expiry Licensed Module Days' (value: 14), and 'Alert Expiry Licensed Connection Days' (value: 14). The 'Security' section is collapsed, showing 'Force Secret Questions #' (value: 0). The 'Licensing User Information' section is collapsed, showing 'User' (value: SHQA_bonnie1) and 'Password' (masked with dots). A blue callout box with an arrow points to the minus sign of the 'Licensing' section, containing the text 'Click to expand/collapse details'.

Table 12: Tenant General Settings

Field	Description
Alert Expiry License Days Alert Expiry License Module Days Alert Expiry License Connection Days	Number of days in which the tenant be notified by email prior the expiration of TrueCommerce licenses.
Force Secret Questions #	Number of secret questions to be answered upon password reset, etc.
User	Name of tenant associated with Foundry license. <i>Do not change.</i>
Password	User's password. <i>Do not change.</i>

Services

The **Services** panel comprises four collapsible sections covering **SMTP Server**, **Microsoft Translation Servicer**, **SMS Gateway** and **Tenant URL Prefix Settings**. Expand each of the sections and fill in the details as per the field descriptions in Table 13.

The screenshot shows the 'Tenant Configuration' interface for tenant 'SHQA_bonnie1'. The 'Services' tab is active. It contains four main sections, each with a collapse/expand icon (a horizontal line with a minus sign) on the right side:

- SMTP Server:** Includes fields for Host (smtp.mycompany.com), Port (25), Domain (my domain), User Name (user), User Password (masked with dots), Email From (alerts@mycompany.com), and a 'Use SSL' checkbox.
- Microsoft Translation Service:** Includes a 'Secret Key' field.
- SMS Gateway:** Includes an 'SMS Gateway License' field (with a refresh icon), a 'Use Secure Connection' checkbox, and a 'Max Messages Per Text' dropdown menu set to 1.
- Tenant URL Prefix Settings:** Includes a 'Register DNS Suffix' button, a 'Delete DNS Suffix' button, a 'DNS Prefix' field, and a 'Tenant URL' field.

A blue callout box with an arrow points to the collapse/expand icon of the SMTP Server section, containing the text: 'Click to expand/collapse details'.

Table 13: Tenant Services Settings

Field	Description
Host	SMPT server from which notifications are sent via email.
Port	SMPT server port
Domain, User Name, User Password	Credentials of email from which notification messages are sent.

Field	Description
Use SSL	Checkbox to indicate SSL encryption.
Email From	Email address used in the 'from' line of notification messages.
Secret Key	Subscription key for access to your Microsoft translation service. This is necessary when using Foundry localizations and you require assisted translations into different languages. See https://www.microsoft.com/en-us/translator/ for subscription information about this service.
SMS Gateway License Use Secure Connection Max Messages Per Text	License and details associated with the use of SMS notification messages. See https://cdyne.com/ for gateway licensing details.
Tenant URL	Tenant specific URL Contact your TrueCommerce representative if you want to set up access to Foundry via your own company URL.

Custom UI

The **Custom UI** panel comprises collapsible sections for customizing **Browser**, **Logon** and **Foundry** images and text. Expand each of the sections to make the changes as per the field descriptions in Table 14.

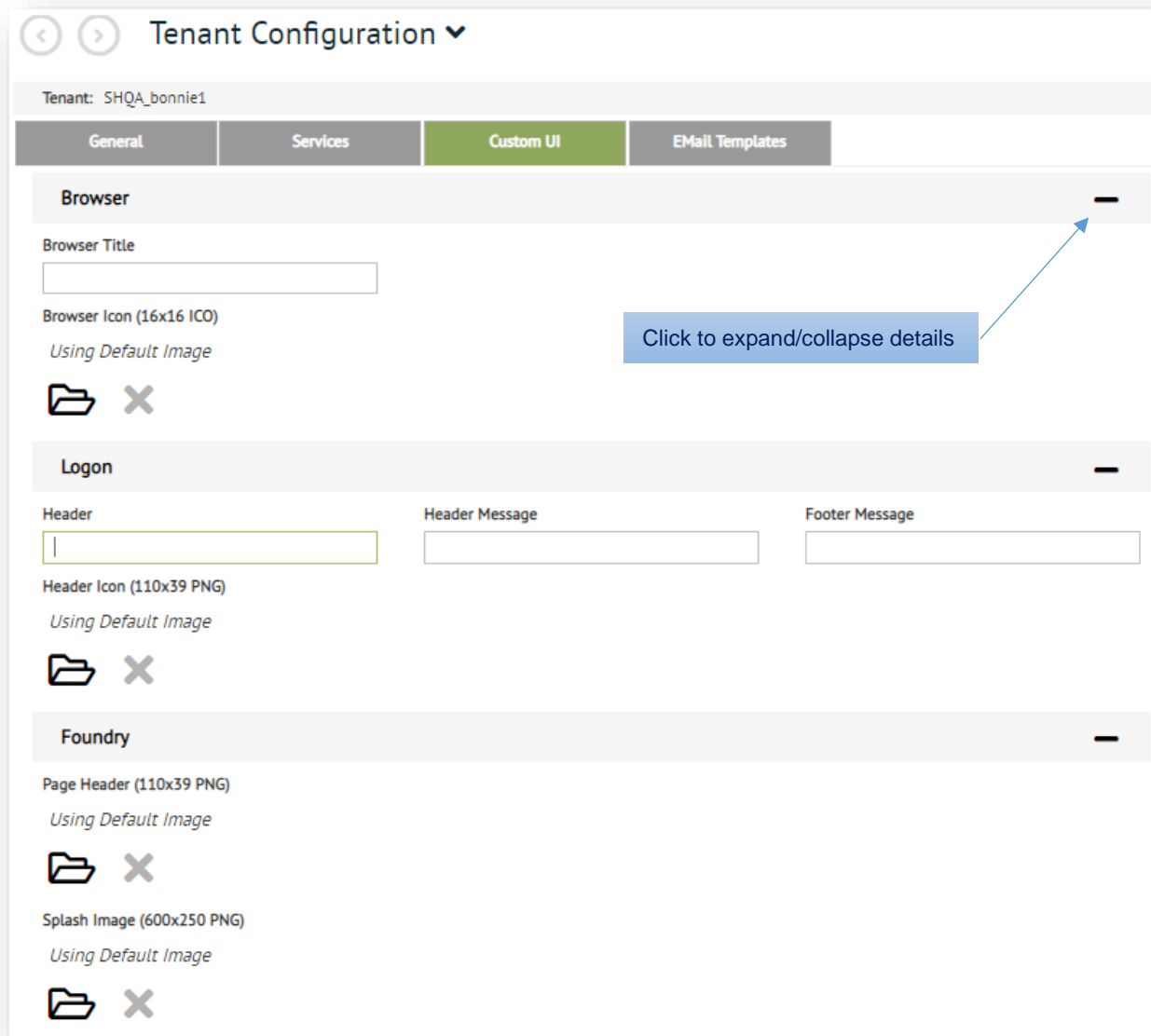






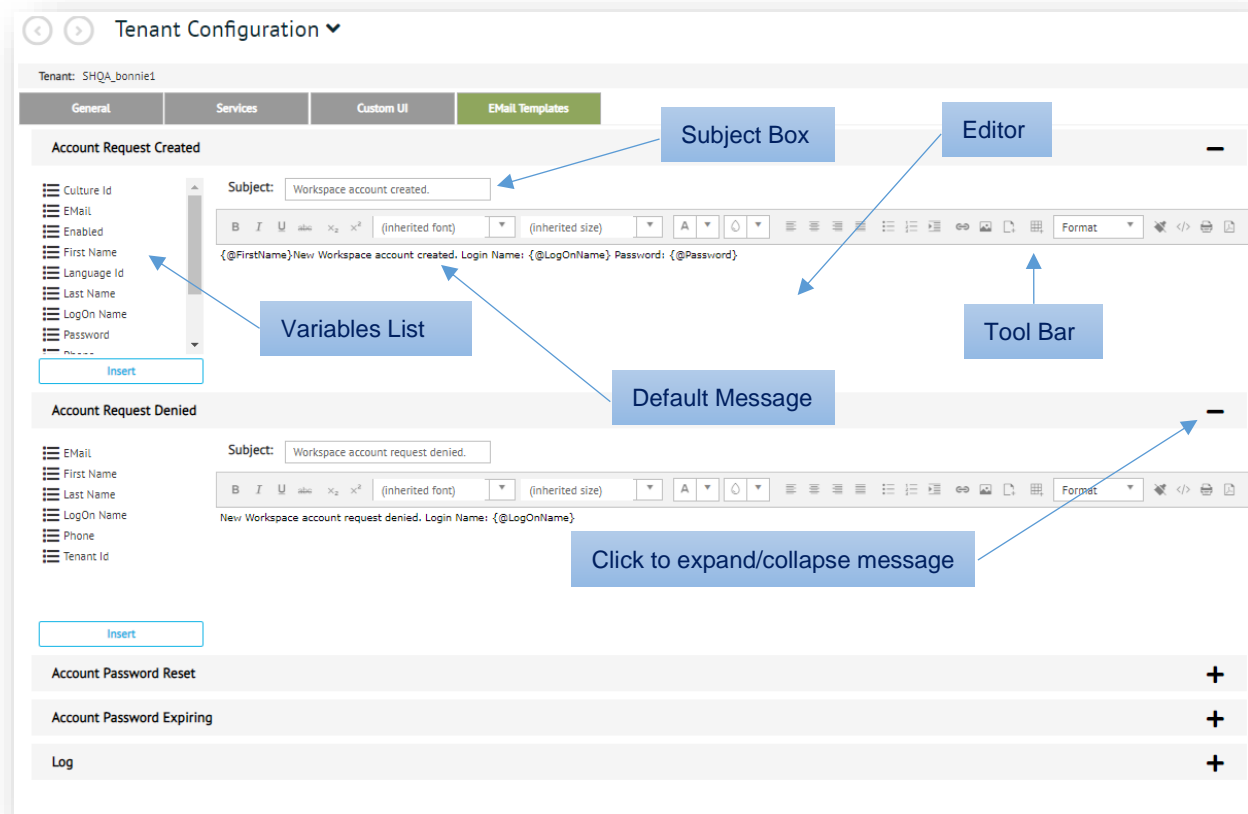
Table 14: Tenant Custom UI Settings

Field	Description
Browser Title	Changes the default title on the browser tab.
Browser Icon	Overrides the default browser icon. Click the  control to upload a 16 x 16 ICO image file from a local folder.
Header	Changes the default header text on the sign-in page (tenant-specific URLs only)
Header Message	Changes the default header message on the sign-in page (tenant-specific URLs only)

Field	Description
Footer Message	Changes the default footer message on the sign-in page (tenant-specific URLs only)
Header Icon	Overrides the default header icon on the sign-in page (tenant-specific URLs only). Click the  control to upload a 110 x 39 PNG image file from a local folder.
Page Header	Overrides the default logo on the page header. Click the  control to upload a 110 x 39 PNG image file from a local folder.
Splash Image	Overrides the default workspace splash image. Click the  control to upload a 600 x 250 PNG image file from a local folder.

Email Templates

The **Email Templates** panel comprises five collapsible sections for editing the standard auto response email messages that result from **Account Request Created**, **Account Request Denied**, **Account Password Reset**, **Account Password Expiring**, and **Log** events.



If required, use the message editor to change default subject and message text. You can apply formatting using various controls on the tool bar. Select from available variables to embed event-specific details, such as {@LogOnName} or {@UserId}.


Print Stations

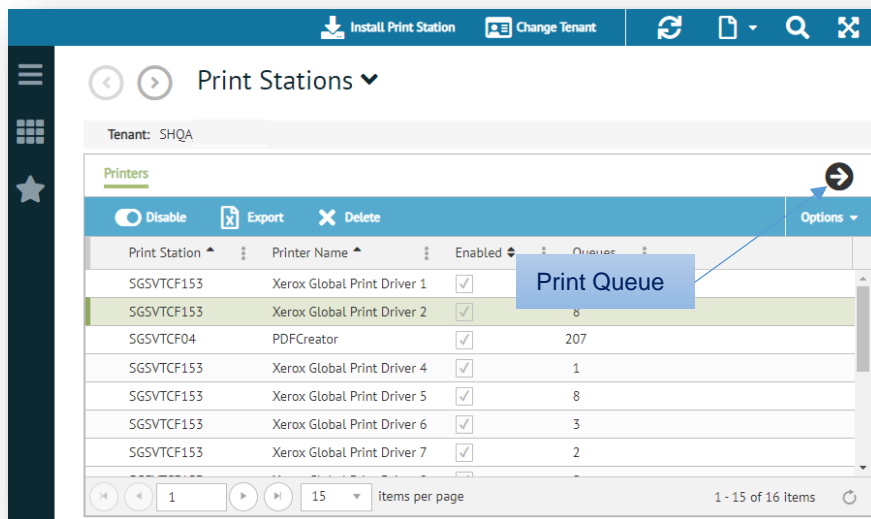
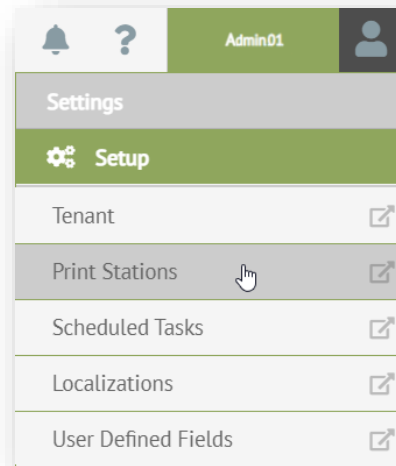
The **Print Stations** ▾ page is where you manage printers and their print queues in TrueCommerce Foundry. Note that every computer used to access Foundry applications must have a print station installed and configured if you plan to print from it. See [Print Station Utility](#), below.

To access the **Print Stations** ▾ page:

1. Click your username / profile picture on the top right corner of the Foundry page header.
2. Select **Settings > Setup** from the drop-down menu.
3. Select **Print Stations** to launch the **Print Stations** ▾ page.

This displays the list of printers available for the selected Tenant ID.

Click the  button on the top right corner of the grid to open the print queue for the selected printer.



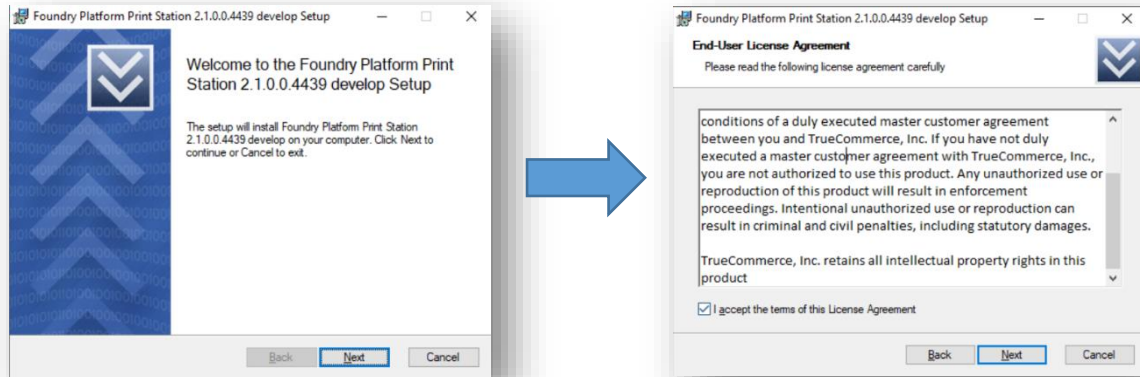
Print Station Utility

Before you can start printing labels and reports from your TrueCommerce applications, you will need to install the print station utility on your computer (*Windows operating systems only*). The instructions below assume you are adding printers for the first time. To add to an existing print station, see [Other Considerations](#), page 55.

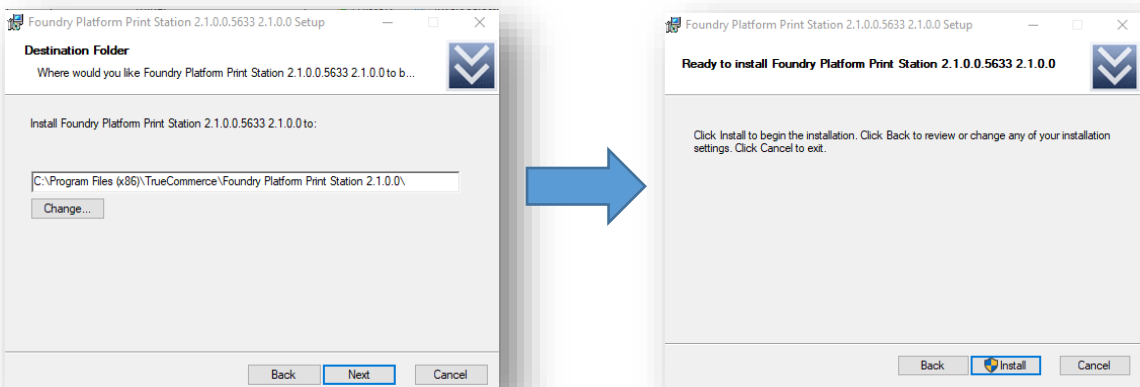
Note that some Foundry applications, such as Pack & Ship, may include a link to install the print station utility directly from their configuration menu; otherwise, the remaining instructions will be the same.

Install Print Station and Printers

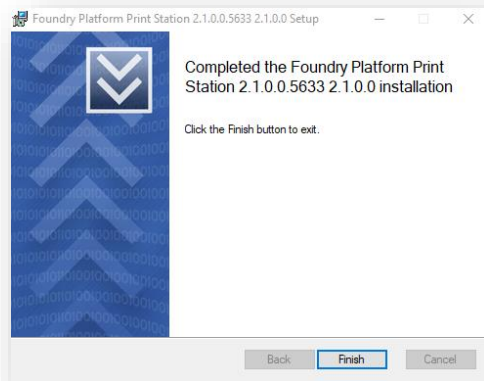
1. Select the  **Install Print Station** on the **Print Stations** action bar to save the installation file to a folder on your Windows computer.
2. Click on the downloaded file (Foundry Platform_PrintStation_XXXXXX.msi) to run the set up wizard.



3. If you accept the terms of the license agreement, select the check box, and then click **Next** to proceed with the installation.
4. Leave the file path as default or click **Change** to choose a different folder.
5. Click **Next** and then **Install**.

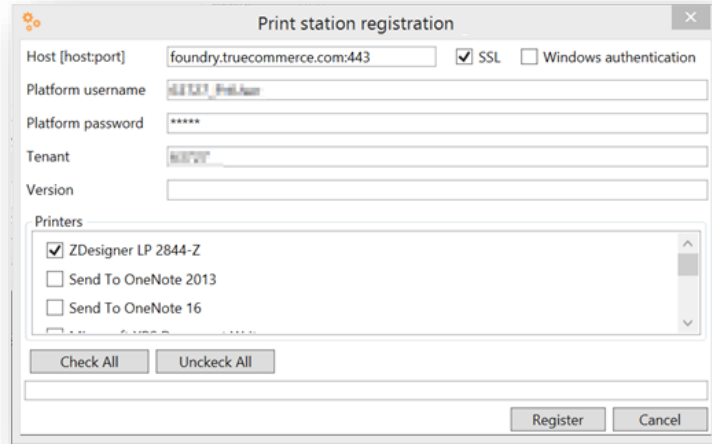


You will receive confirmation that the installation has completed successfully.

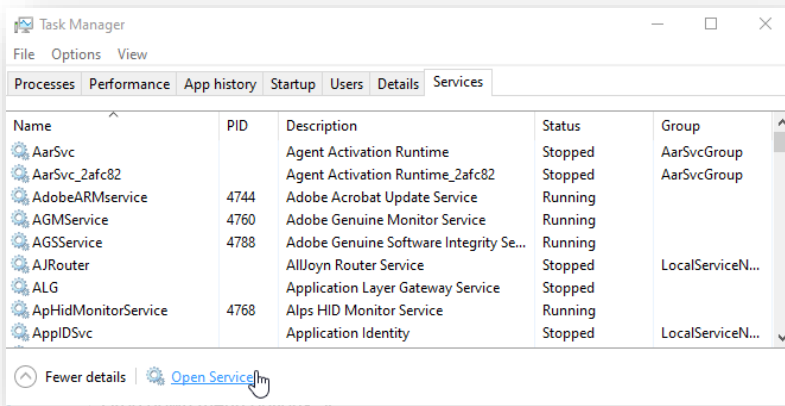


6. Click **Finish** to exit the installation wizard. This launches the print station registration.

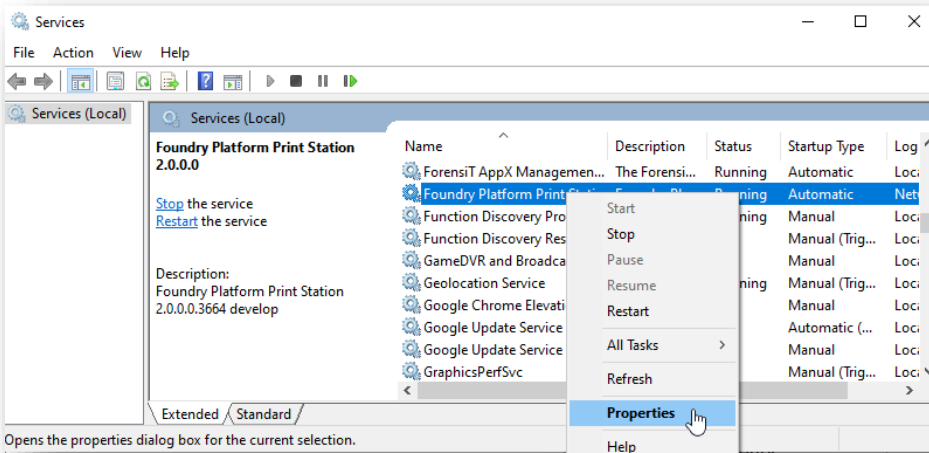
7. Fill out key registration details:
Host:
Platform Username:
Platform Password:
Tenant:
8. Select the **SSL** checkbox.
9. Select printers listed in the **Printers** box that you will be using and then click **Register**. Once the print station is registered, further steps are required to ensure the printer service is set to automatic delayed start.




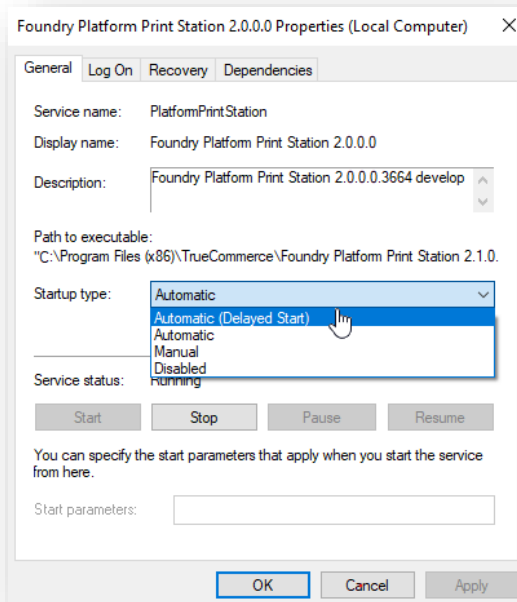
10. Open **Task Manager**, select the **Services** tab and then click **Open Services**.



11. Right-click the **Foundry Platform Print Station** service, and then click **Properties**.



12. When the properties dialog box displays, ensure the **General** tab is selected.
13. Click the **Startup type** drop-down field.
14. Select **Automatic (Delayed Start)**.
15. Click **Apply**, and then **OK** to exit the properties dialog.
16. Close the **Services** dialog, and then exit the **Task Manager**.
17. Return to the **Print Stations** ▼ page in TrueCommerce Foundry.
18. Click the  *refresh* button on the action bar to see that the new printers show up as options.



Other Considerations

- The Foundry Platform Print Station utility runs on Windows only.
- Every computer used to access Foundry applications must have the print station installed and configured if you plan to print labels and reports from it.
- You can add or remove printers from your computer's print station at any time.
- To access the print station utility on your computer after the initial install, locate the folder *C:\Program Files (x86)\HighJump\Foundry Platform Print Station 1.5.0.0\Management* and run *Accellos.Printing.PrintStationAdmin.exe*. Note that you may need to run this program in Windows administrator mode.



NOTE

Some Foundry applications, such as Pack & Ship, will have their own printer settings that need to be adjusted before you attempt to print.

Scheduled Tasks

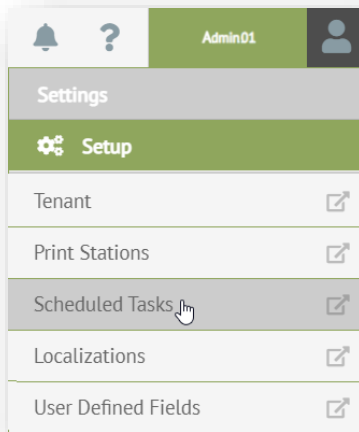
The scheduled tasks feature in Foundry allows you to create and setup jobs to run at scheduled intervals. For example, you may need to purge daily logs every day at a specific time. You can automate this type of activity by creating a scheduled task.

- [Scheduled Tasks Page](#), below
- [Creating Scheduled Tasks](#), page 58
- [Editing Scheduled Tasks](#), page 62
- [Deleting Scheduled Tasks](#), page 62

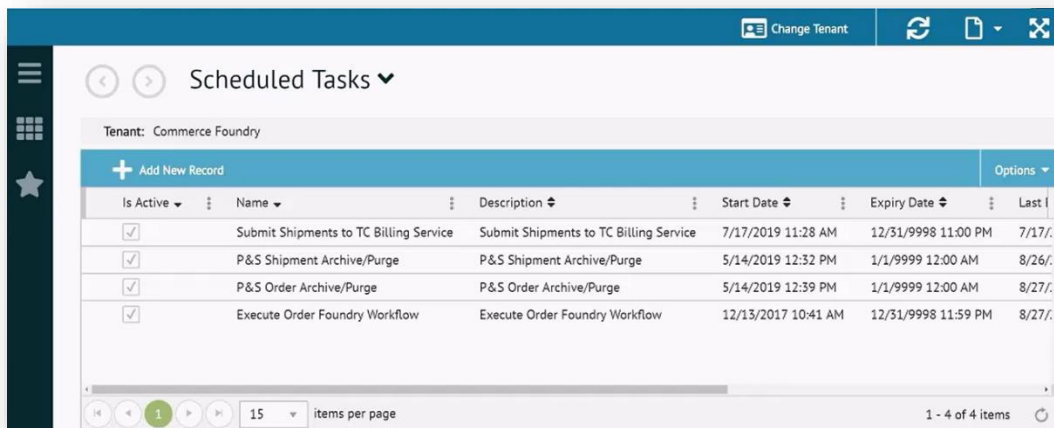
Scheduled Tasks Page

Scheduled tasks are created and maintained via the **Scheduled Tasks** ▾ page, which can be accessed by those who are assigned Administrator [System Roles](#). To access the **Scheduled Tasks** ▾ page:

1. Click your username / profile picture on the top right corner of the Foundry page header.
2. Select **Settings > Setup** from the drop-down menu.



3. Select **Scheduled Tasks** to launch the **Scheduled Tasks** ▾ page.



From here, you can add a new scheduled task. You can also select a task to run, edit, delete, view its jobs or view its execution history as outlined in the sections that follow.

Run a Task

To run a task immediately:

1. From the [Scheduled Tasks Page](#), select the task you want to run.
2. Click **▶ Run** on the grid control bar.

View History

To view the execution history of the scheduled task:

1. From the [Scheduled Tasks Page](#), select the task you want to view.
2. Click **↺ View History** on the grid control bar expand the list of previous events panel.

The screenshot shows the 'Scheduled Tasks' interface for the 'Commerce Foundry' tenant. The main table lists tasks with columns for 'Is Active', 'Name', 'Description', 'Start Date', 'Expiry Date', and 'Last Modified'. The tasks listed are:

Is Active	Name	Description	Start Date	Expiry Date	Last Modified
<input checked="" type="checkbox"/>	Submit Shipments to TC Billing Service	Submit Shipments to TC Billing Service	7/17/2019 11:28 AM	12/31/9998 11:00 PM	7/17/2019 11:28 AM
<input checked="" type="checkbox"/>	P&S Shipment Archive/Purge	P&S Shipment Archive/Purge	5/14/2019 12:32 PM	1/1/9999 12:00 AM	8/26/2019 12:32 PM
<input checked="" type="checkbox"/>	P&S Order Archive/Purge	P&S Order Archive/Purge	5/14/2019 12:39 PM	1/1/9999 12:00 AM	8/27/2019 12:39 PM
<input checked="" type="checkbox"/>	Execute Order Foundry Workflow	Execute Order Foundry Workflow	12/13/2017 10:41 AM	12/31/9998 11:59 PM	8/27/2019 10:41 AM

Below the main table is a 'Task Jobs' section with a table showing the execution details for the selected task:

Description	Application Id	Running Timeout	Timeout
Submit Shipments to TC Billing Service	Pack and Ship	0.0:0.0	0.0:0.0

View Jobs

To view jobs associated with a scheduled task:

1. From the [Scheduled Tasks Page](#), select the task you want to view.
2. Click **≡ View Jobs** on the grid control bar to expand the **Task Jobs** panel.

This screenshot is similar to the previous one but includes a callout box pointing to the 'View Jobs' button (represented by a list icon) in the grid control bar. The callout text reads: "One or more jobs associated with task".

Creating Scheduled Tasks

To create a scheduled task:

1. From the [Scheduled Tasks Page](#), select **+ Add New Record** on the grid control bar to launch the **Edit Schedule Task** editor. Use the tabbed panels to access [General](#), [Occurrence](#), and [Jobs](#) settings for configuring the scheduled task.
2. When the configuration under each of these tabs is complete, click **Save** on the action bar to save the scheduled task and exit the editor. The newly created scheduled task is added to the [Scheduled Tasks Page](#).

General

Fill in the details under the **General** tab as per the field descriptions in Table 15.

The screenshot shows the 'Edit Scheduled Task' form with the 'General' tab selected. The form contains the following fields and values:

- Id:** 86882e07-8fe3-663d-dab7-d1a7f971dd58
- Active:**
- Name:** [Empty text box]
- Description:** [Empty text box]
- Start Date:** 9/10/2019
- Expiry Date:** [Empty date picker]
- Max # of Executions:** [Empty spinner]
- Current # of Executions:** 0
- Task Timeout (dd.hh:mm:ss):** 0 : 0 : 5 : 0

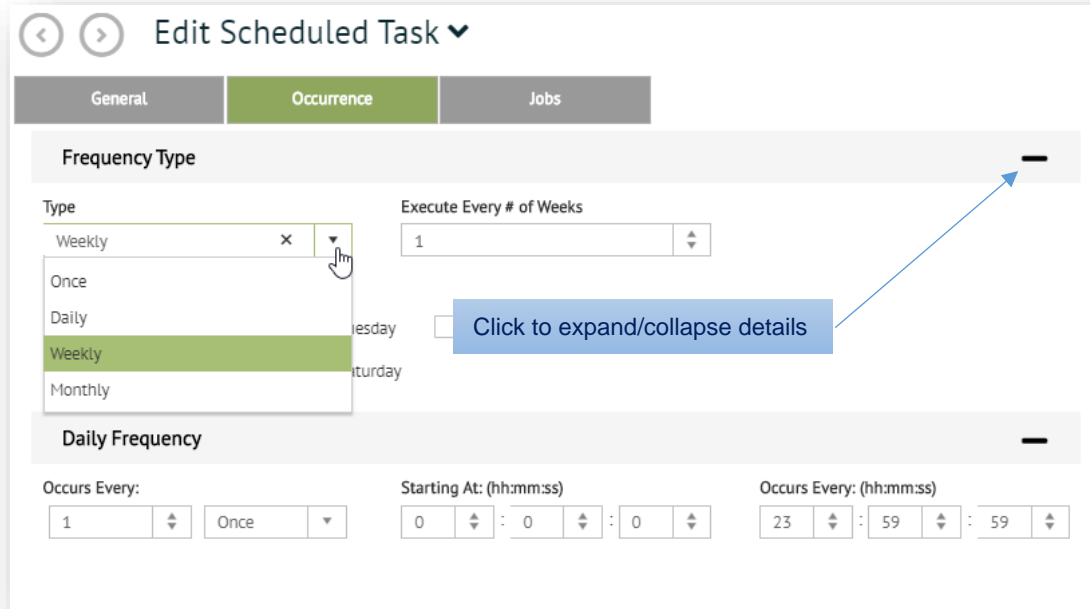
Table 15: Scheduled Task General Settings

Field	Description
Id	System-generated unique identifier for the scheduled task
Is Active	Check box to indicate if the scheduled task is active
Name	Unique name of the scheduled task
Description	Description of the scheduled task. For example, include the name of the job that runs and the frequency
Start Date	Start date of the scheduled task
Expiry Date	Expiration date of the scheduled task
Max Executions #	Maximum number of times that the task should run. When you leave the field blank, the task continues to operate until the expiry date.



Field	Description
Current Executions #	Number of times the job has run according to its schedule. Newly created tasks have a current executions value of zero.
Timeout	Length of time in days, hours, minutes, and seconds for the task to timeout if it fails to run

Occurrence

The **Occurrence** panel determines how often the scheduled event occurs. Expand each of the sections to fill in the details required. The **Frequency Type** determines the options available in subsequent fields.

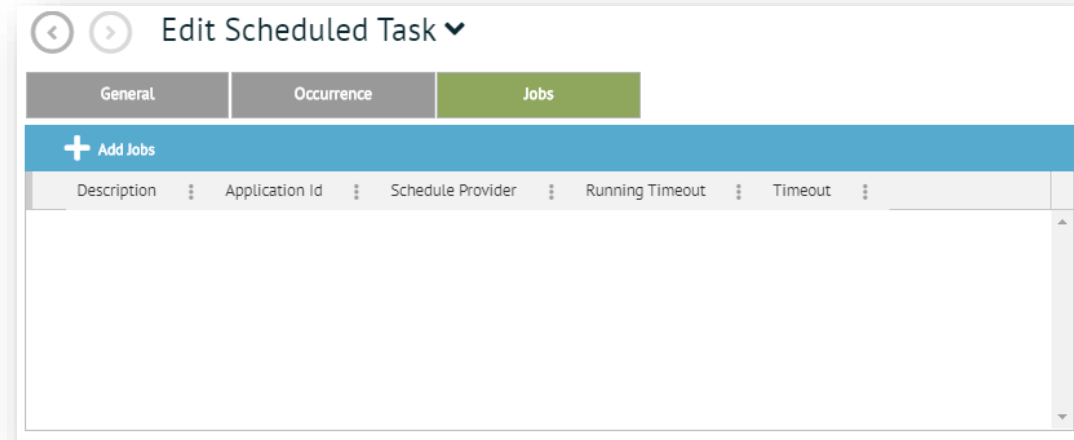


Select an option from the **Type** drop-down list. Use the information below to determine the remaining steps based on the frequency type selected:

- Once** Use the  *calendar* and  *time* controls to set a date and time that the job should run.
- Daily** 1. Select a number for **Execute Every # Days** if you want the task to run every # days.
2. Complete the **Daily Frequency** section.
- Weekly** 1. Select a number for **Execute Every # Days** if you want the task to run every # weeks.
2. Select one or more days of the week to **Execute On**.
3. Complete the **Daily Frequency** section.
- Monthly** 1. Select a number for **Execute Every # Days** if you want the task to run every # months.
2. Select one or more days of the month to **Execute On**.
3. Complete the **Daily Frequency** section.

Jobs

The **Jobs** tab is where you can add one or more jobs to the scheduled task.

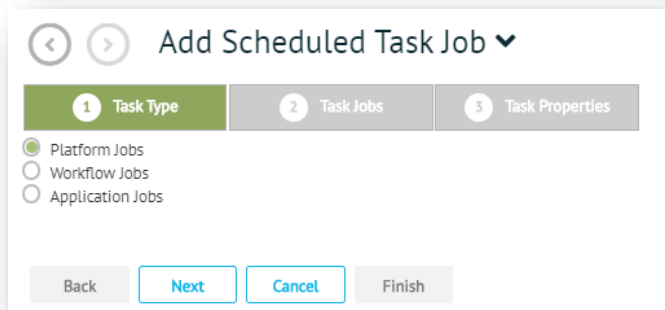


To add a task job:

1. Select **+ Add Jobs** on the grid control bar to display the **Add Scheduled Task Job** editor. The editor walks you through the [Task Type](#), [Task Jobs](#), and [Task Properties](#) panels for setting up the job.

Task Type

2. Select a **Task Type** as per the descriptions below.



Platform Jobs Internal jobs related to TrueCommerce Foundry platform.

Workflow Jobs Workflow jobs are any of the following:

- Related to Foundry
- Related to a specific application
- Shipped with the product
- Built by an Implementation Consultant or a customer

Note

The workflow job must have the Schedulable Category set for it to display in the list.

Application Jobs Jobs related to applications. When you select this job type, you must also select the Provider for the application.

3. Click **Next** to advance to the **Task Jobs** panel.

Task Jobs

- Select a **Task Job** from the options available.

The screenshot shows the 'Add Scheduled Task Job' dialog box with three tabs: 'Task Type', 'Task Jobs', and 'Task Properties'. The 'Task Jobs' tab is active. It lists two jobs: 'Bonnie1WF-Schedulable' (unchecked) and 'UpdateOrderStatus' (checked). Below the job list, the 'Method Name' is 'UpdateOrderStatus'. The 'Timeout (dd.hh:mm:ss)' is set to 0:10:00. The 'Job Parameters' section has two empty text input fields labeled 'fromStatus' and 'toStatus'. At the bottom, there are buttons for 'Back', 'Next', 'Cancel', and 'Finish'.

- Fill in the **Timeout** and **Job Parameters** that relate to the selected jobs.



NOTE

The **Timeout** for scheduled tasks is the time allowed for the job to finish before the schedule server stops it. Also note that some jobs do not provide parameter options other than the **Timeout**.

- Click **Next** to advance to the **Task Properties** panel.

Task Properties

- Type in a **Description** of the job and select the **Running Timeout** and the **Timeout** values.



The screenshot shows the 'Add Scheduled Task Job' dialog box with the 'Task Properties' tab active. The 'Job Properties' section is expanded. It contains a 'Description' text input field, an 'Application Platform' dropdown menu, a 'Running Timeout (dd.hh:mm:ss)' spinner set to 0:10:00, and a 'Timeout (dd.hh:mm:ss)' spinner set to 0:10:00. At the bottom, there are buttons for 'Back', 'Next', 'Cancel', and 'Finish'.

- Click **Finish** to exit the **Add Scheduled Task Job** editor. The job is added to the **Jobs** grid.
- Repeat the process to add more to the [Jobs](#) grid.

To make changes to jobs, double-click on a record to make it editable. To delete a selected record, click **✕ Delete** on the grid control bar. Click **✓ Save** on the grid control bar to save your changes.


Editing Scheduled Tasks

To edit a scheduled task:

1. From the [Scheduled Tasks Page](#), select the task you want to edit.
2. Double-click on the record or click  **Edit** on the grid control bar to launch the **Edit Schedule Task** editor.
3. Use the tabbed panels to access [General](#), [Occurrence](#), and [Jobs](#) settings panels as described under [Creating Scheduled Tasks](#).
4. When your changes are complete, click  **Save** on the action bar to save the updated configuration and exit the editor.

Deleting Scheduled Tasks

To delete a scheduled task:

1. From the [Scheduled Tasks Page](#), select the task you want to delete.
2. Click  **Delete** on the grid control bar.
3. When prompted, click the **Delete** button to confirm that you intend to delete the selected task.

The deleted task is removed from the grid.

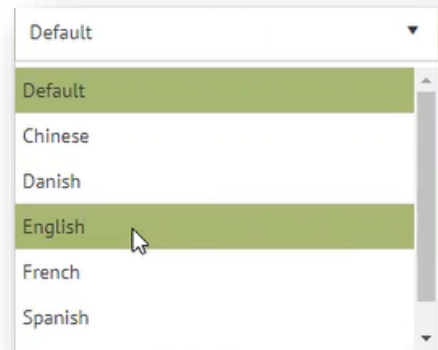
Localizations

Localizations allow you to translate the Foundry UI to a different language or rename headings, labels, and other text objects to be consistent with terminology used in your business operation.

Users are able to select from available languages under **Advanced View** below the Foundry **Sign In** prompt. See [Logging In](#), page 8. Note that once a user makes the switch, that localization becomes their **Default** until another option is selected.

This section covers how to create and edit localizations.

- [Localizations Page](#), below
- [Setting Localizations](#), page 64
- [Deleting Localizations](#), page 66



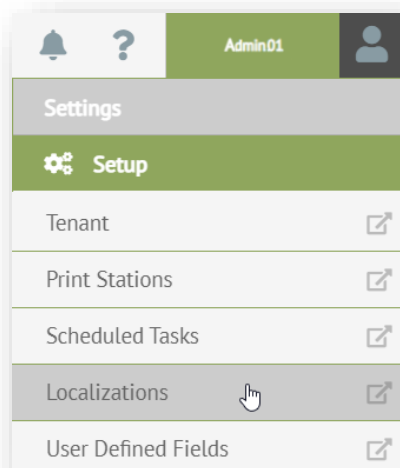
Localizations Page

Localization is set up and maintained via the **Localizations** ▼ page, can be accessed by those who are assigned Administrator [System Roles](#).

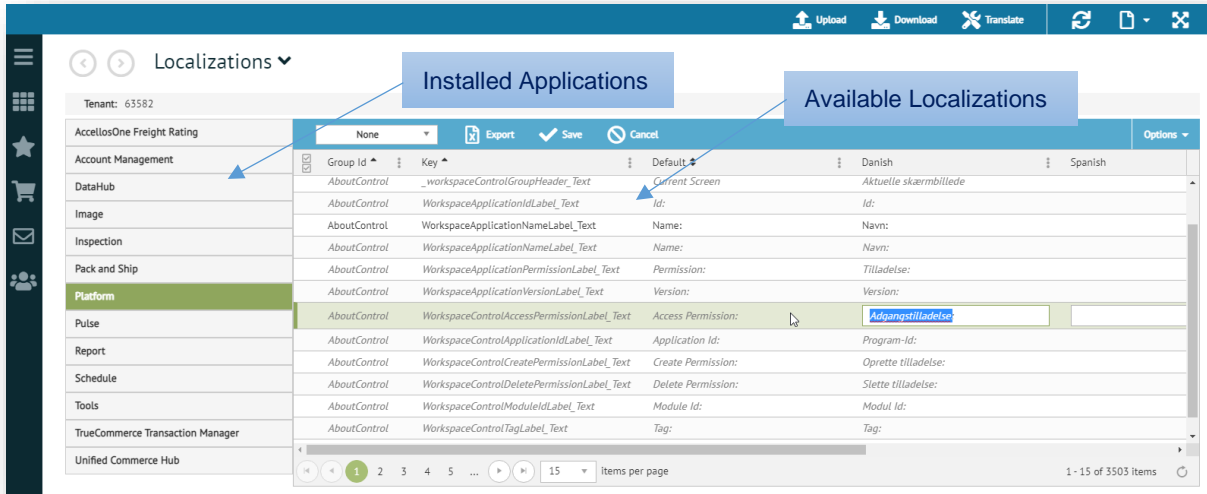
This is where you can specify which Foundry and application interfaces you want to rename local to your organization and/or translate to different languages.

To access the **Localizations** ▼ page:

1. Click your username / profile picture on the top right corner of the Foundry page header.
2. Select **Settings > Setup** from the drop-down menu.



3. Select **Localizations** from the drop-down menu to launch the **Localizations** ▼ page.



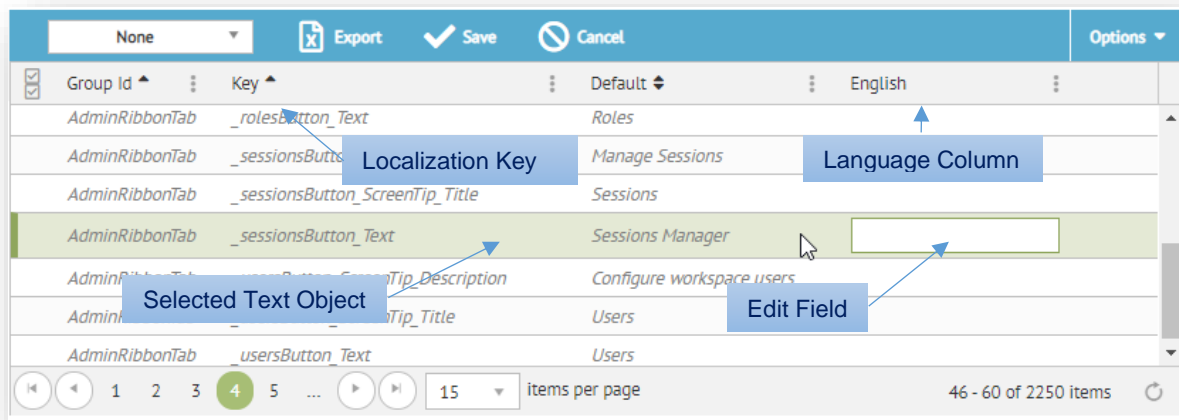
4. Use the navigation menu on the left of the **Localizations** grid to access all of the applications installed on your system for which you can rename or translate headings, labels, and other text objects.

Setting Localizations

All localizations are applied using the same process, whether you are renaming local to your organization or translating to a different language.

To set localization for selected text objects:

1. Use the navigation menu on the left of the [Localizations Page](#) to select the installed application for which you want to add or change localizations. The application's localizations grid displays.
2. Use the localization keys to locate each text object you want to rename or translate.
3. Double-click or click **Edit** on the grid control bar to make the selected record editable.



4. Use the edit fields under each of the language columns to enter alternate text or to [Translate](#) the text objects you want changed. For more information about the localization grid, translation options and renaming default text objects, refer to the [Localization](#), below.
5. Click **Save** on the grid control bar to save changes for the record selected.
6. Repeat for any other localizations you want changed.


The new localized headings, labels, and other text objects will display for users when they log in and select the language where you made those changes. See [Logging In](#) on page 8.

Localization Notes


It might be helpful to understand the following concepts when setting localizations in Foundry:

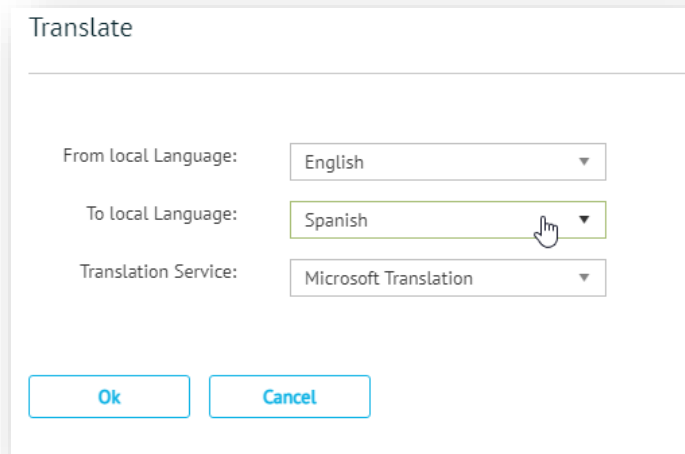
- The localizations grid lists the common languages for which you can [Translate](#) objects. These are the languages available via drop-down when users are [Logging In](#).
- Language columns are defined at the system level. If you require a language that is not listed on the grid, contact your TrueCommerce representative to make the change.
- If you want to rename rather than translate the English default for a selected text object, add the new text under the **English** column. For example, you may have reason to change a label from *Created Date* to *Date Created*. To see this change, your users would need to select **English** from the drop-down when [Logging In](#).
- Switching languages only works for text objects that have been translated or renamed in the localizations grid; otherwise, the system defaults remain in place regardless of the selected language.
- System defaults are the text objects displayed in gray italics on the localization grid. Your localized text is displayed in non-italicized font.

Translate

You can enter translations manually or use the  **Translate** control to auto translate selected objects. This feature requires a subscription to a translation service such as Microsoft Translation, which must be configured under [Services](#) on the [Tenant Configuration Page](#), described on page 46.

To translate selected headings, labels, and other text objects:

1. Select an object for editing as described under [Setting Localizations](#), page 64.
2. Place your cursor in the edit field in the appropriate language column.
3. Click  **Translate** on the **Localizations** action bar. The **Translate** dialog displays.

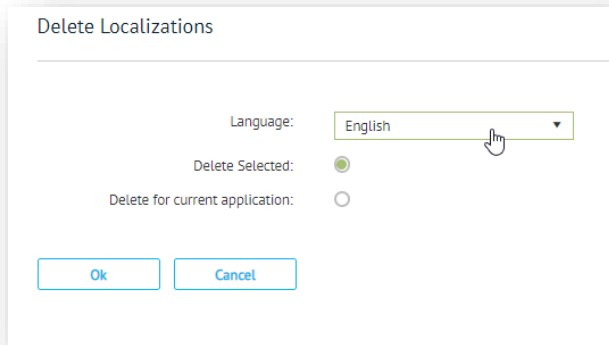


4. Choose your **From Local Language** and your **To Local Language** from the drop-down fields.
5. Select your translation service (if you have more than one) and **then** click **OK**.
The new translated text object will display in the selected edit field.

Deleting Localizations

To delete localizations:

1. Use the navigation menu on the left of the [Localizations Page](#) to select the application for which you want to delete localizations.
2. Select a localization record and then click **X Delete** on the grid control bar. The **Delete Localizations** dialog displays.



3. Choose the language of the localization you want to delete.
4. Choose a deletion method and then click **OK**.
The deleted localization is removed from the grid for the language selected.

User Defined Fields

Administrators have the ability to add custom data fields to your TrueCommerce applications for entering, capturing and displaying information that may be required for your implementation.

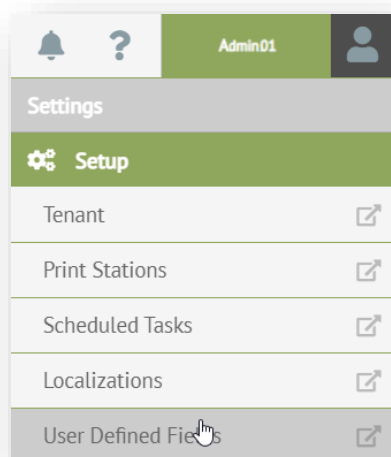
- [User Defined Fields Page](#), below
- [UDF Grid](#), page 67
- [Working with UDFs](#), page 68
- [UDF Example](#), page 72

User Defined Fields Page

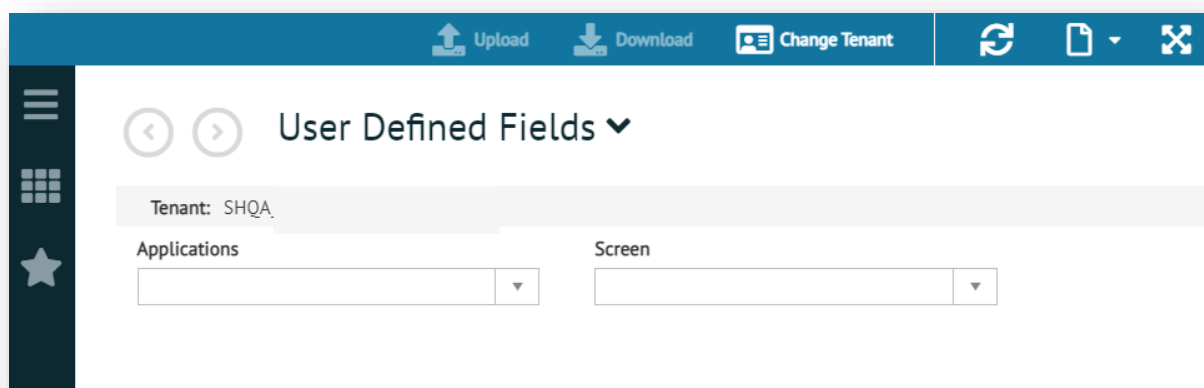
User Defined Fields (UDFs) are created and maintained via the **User Defined Fields** ▼ page, which can be accessed by those who are assigned Administrator [System Roles](#).

To access the **User Defined Fields** ▼ page:

1. Click your username / profile picture on the top right corner of the Foundry page header.
2. Select **Settings** > **Setup** from the drop-down menu.



3. Select **User Defined Fields** from the drop-down menu to launch the **User Defined Fields** ▼ page.

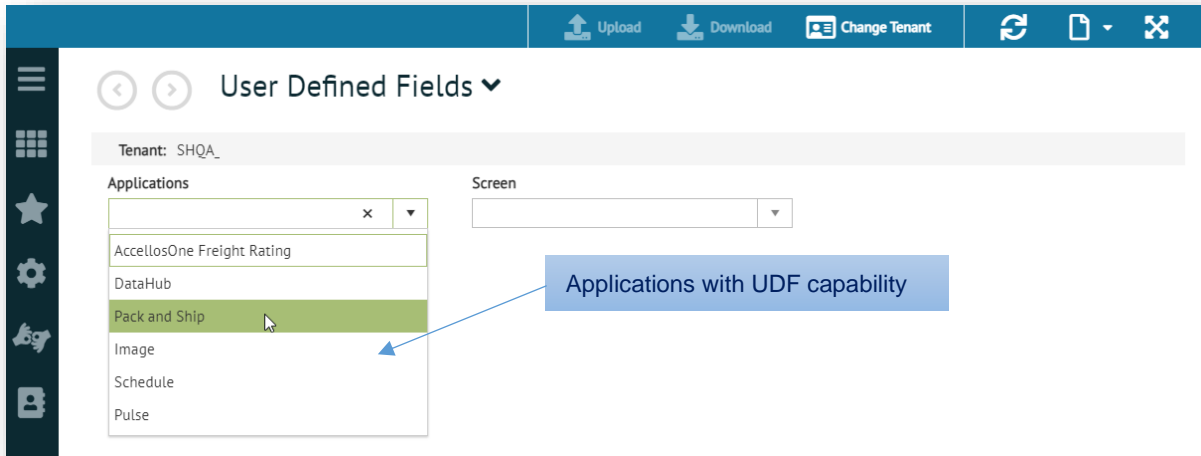


From here you can choose from the various applications that have UDF capability to create customized fields on data screens (grids or forms) as described in the sections that follow.

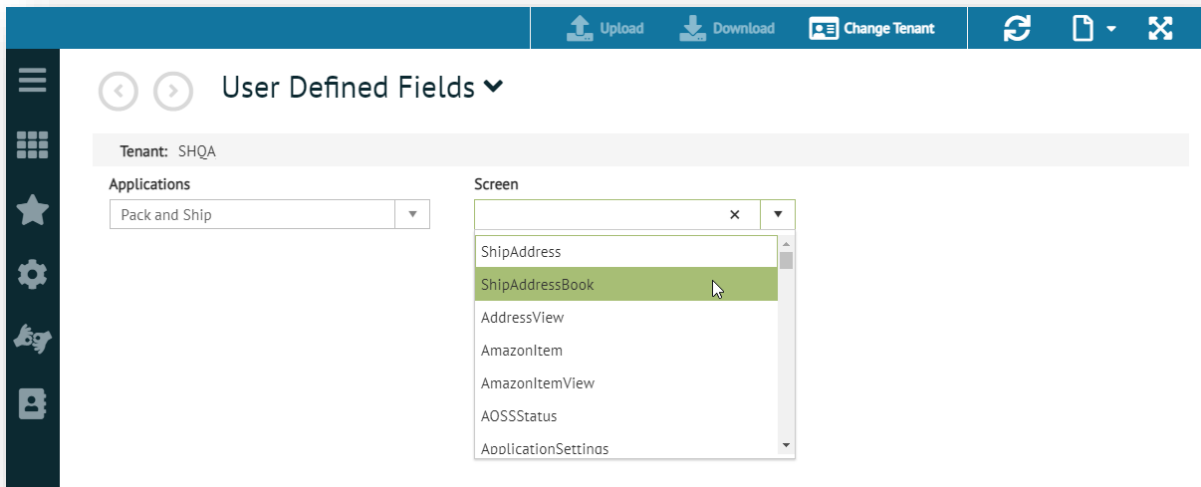
UDF Grid

To access the UDF options available within a selected application and screen:

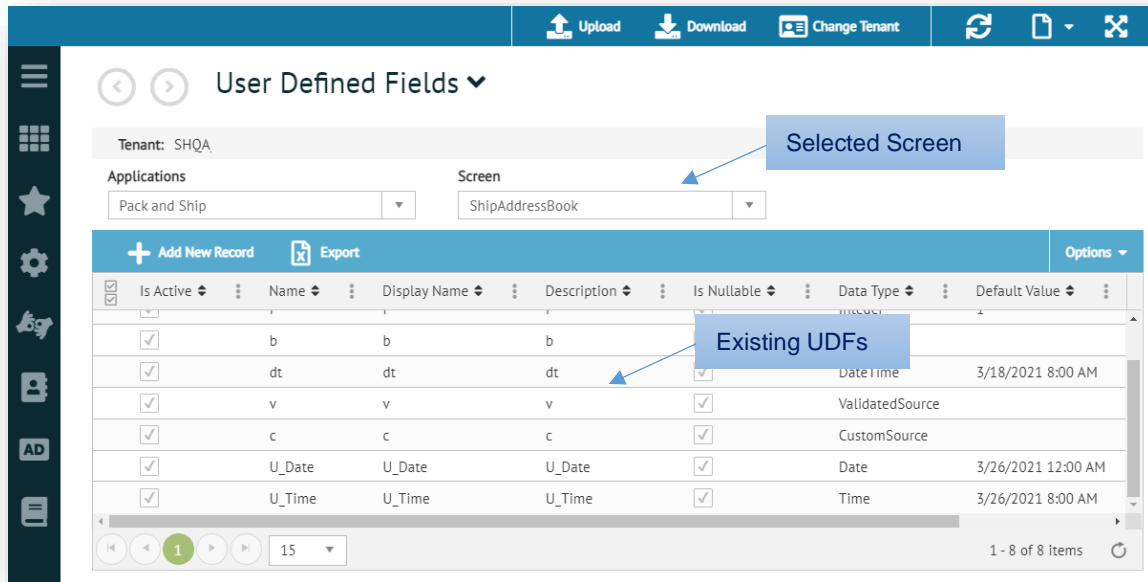
1. From the [User Defined Fields Page](#), select an application from the **Applications** drop-down menu.



2. Select a task page component from the **Screen** drop-down menu.



This opens the UDF grid for the selected screen showing the user defined fields (if any) that have been created for your implementation.



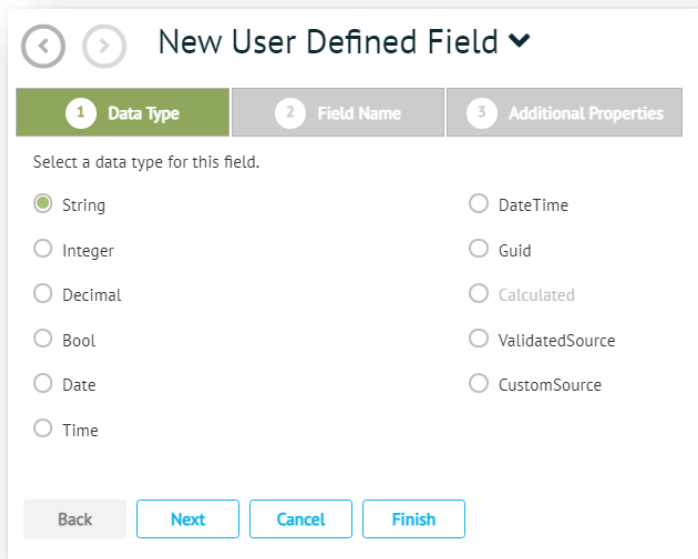
Working with UDFs

Creating UDFs

To create a new User Defined Field:

1. From the [UDF Grid](#), select **+ Add New Record** on the grid control bar to launch the **New User Defined Field** editor. The editor walks you through the tabbed panels for defining your new UDF.

Data Type



2. Select a data type for this field.
3. Click **Next** to advance to the **Field Name** panel.

Field Name

4. Type in a unique **Name** and **Display Name**, and include a brief **Description** for this field.
5. Click **Next** to advance to the **Additional Properties** panel.

Additional Properties

6. Fill in any other parameters that may be required to define the field, including a default value.
7. Click **Finish** to exit the editor. The newly created UDF is added to the [UDF Grid](#).


Editing UDFs

To edit an existing UDF:

1. Select the UDF you want to update from the [UDF Grid](#).
2. Click **Edit** on the grid control bar to launch the **Edit User Defined Field** panel.
3. Update the necessary settings in the tabbed panels as described under [Creating UDFs](#).
4. Click **Submit** on the action bar to save the updated UDF and exit the editor.

Deactivating UDFs


To deactivate a UDF:

1. Select the UDF you want to deactivate on the [UDF Grid](#).
2. Click  **Deactivate** on the grid control bar.

The **Is Active** checkbox is deselected for that record on the UDF grid and the UDF will no longer be available on the selected application and screen. If you need to *activate* a UDF, select the **Is Active** checkbox on the [Additional Properties](#) panel as described under [Editing UDFs](#).



Deleting UDFs

To delete a UDF:

1. Select the UDF you want to delete on the [UDF Grid](#).
2. Click  **Delete** on the grid control bar.
3. When prompted, click the **Delete** button to confirm that you intend to delete the selected UDF.

The deleted UDF is removed from grid and no longer appears on the selected application and screen.


Downloading / Uploading UDFs

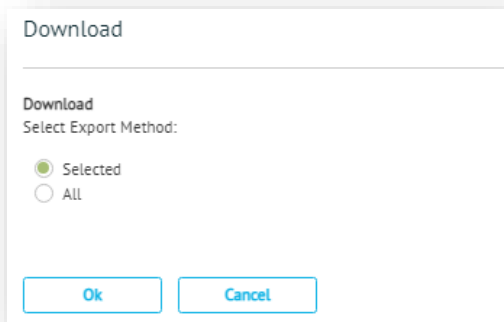
UDF configurations can also be backed up to files on a local computer via the  **Download** control. Note that this is not the same as the  **Export** control, which exports the grid to an XLSX file.

The steps to download and upload UDF configurations are provided below.

Download UDFs

To save UDFs to a file:

1. Select an application and screen on the [User Defined Fields Page](#).
2. Select one or more UDF records on the [UDF Grid](#).
3. Click  **Download** on the action bar. The **Download** dialog displays.



4. Choose an export method and then click **OK**:

Selected

This downloads a single 'SelectedUDFs_<screen>.TCUDFs' file that contains configurations from each of the UDF records selected on the [UDF Grid](#) for <screen>.


All

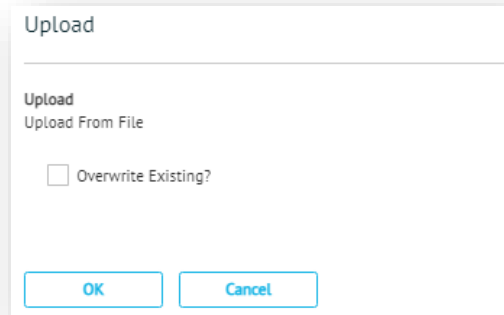
This downloads a single "SelectedUDFs_<screen>.TCUDFs" file that contains configurations from all the UDF records selected on the [UDF Grid](#) for <screen>.

5. Locate the 'downloads' folder used by your browser to retrieve the exported file on your computer.

Upload UDFs

To upload and retrieve UDFs from a file:

1. Select an application and screen on the [User Defined Fields Page](#).
2. Click  **Upload** on the action bar. The **Upload** dialog displays.



3. Select the **Overwrite Existing?** check box if you want existing UDFs to be overwritten.
4. Click **OK**:
This launches your browser's **Open** dialog for retrieving a 'TCUDFs' type file from your computer.
5. Locate and select a file with a 'TCUDFs' extension and then click **Open**.
When the upload is complete, the imported UDFs are added to the [UDF Grid](#).

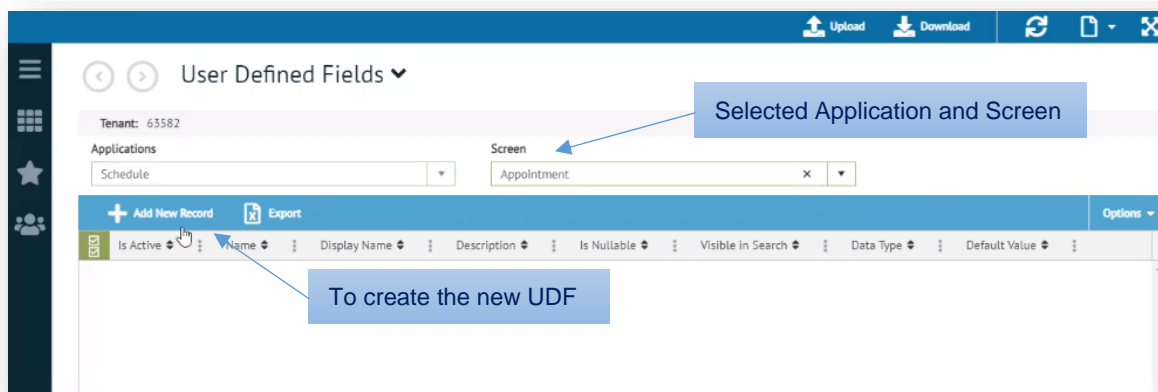
UDF Example

Most Foundry based applications are designed to accept a number of data fields created via the [User Defined Fields Page](#). UDFs play a key role in configuring data requirements that are specific to the organization licensing an application.

The following example explains how to add a new field to appointments in TrueCommerce Schedule.

To create the new field via the [User Defined Fields Page](#):

1. Select Schedule from the **Applications** drop-down menu.
2. Select Appointment from the **Screen** drop-down menu.
3. Select **+ Add New Record** on the grid control bar as illustrated below.



This launches the **New User Defined Field** editor.

4. Select the **Data Type** and click **Next** to advance to the **Field Name** tab.

New User Defined Field

1 Data Type 2 Field Name 3 Additional Properties

Select a data type for this field.

- String
- Integer
- Decimal
- Bool
- Date
- Time
- DateTime
- Guid
- Calculated
- ValidatedSource
- CustomSource

Back Next Cancel Finish

5. Type in a **Name**, **Display Name**, and **Description** for the new field.

New User Defined Field

1 Data Type 2 Field Name 3 Additional Properties

Enter User Defined Field name and description.

Name: UDF01 Display Name: UDF01DISPLAYNAME

Description: UDF01_DESCRIPTION

Back Next Cancel Finish

In this example, no **Additional Properties** will be required.

6. Click **Finish** to exit the editor. The new record is added to the Schedule/Appointment UDF grid.

User Defined Fields

Tenant: 63582

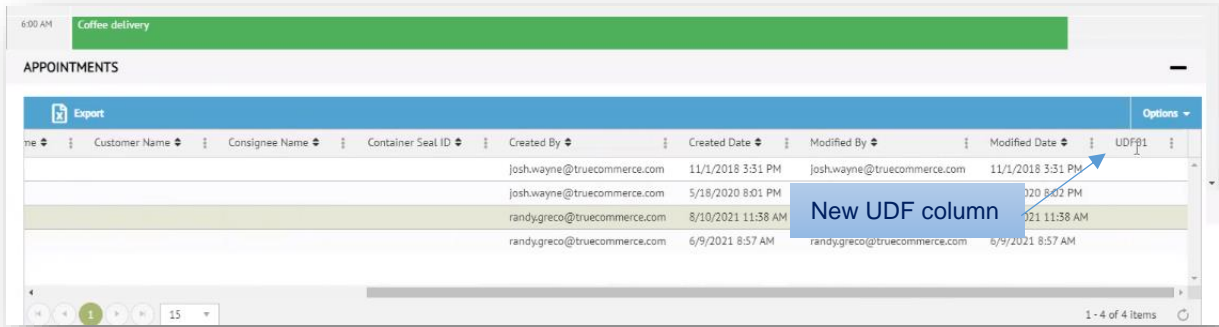
Applications: Schedule Screen: Appointment

Is Active	Name	Display Name	Description	Is Nullable	Visible in Search	Data Type	Default Value
<input checked="" type="checkbox"/>	UDF01	UDF01_DISPLAYNAME	UDF01_DESCRIPTION	<input checked="" type="checkbox"/>	<input type="checkbox"/>	String	

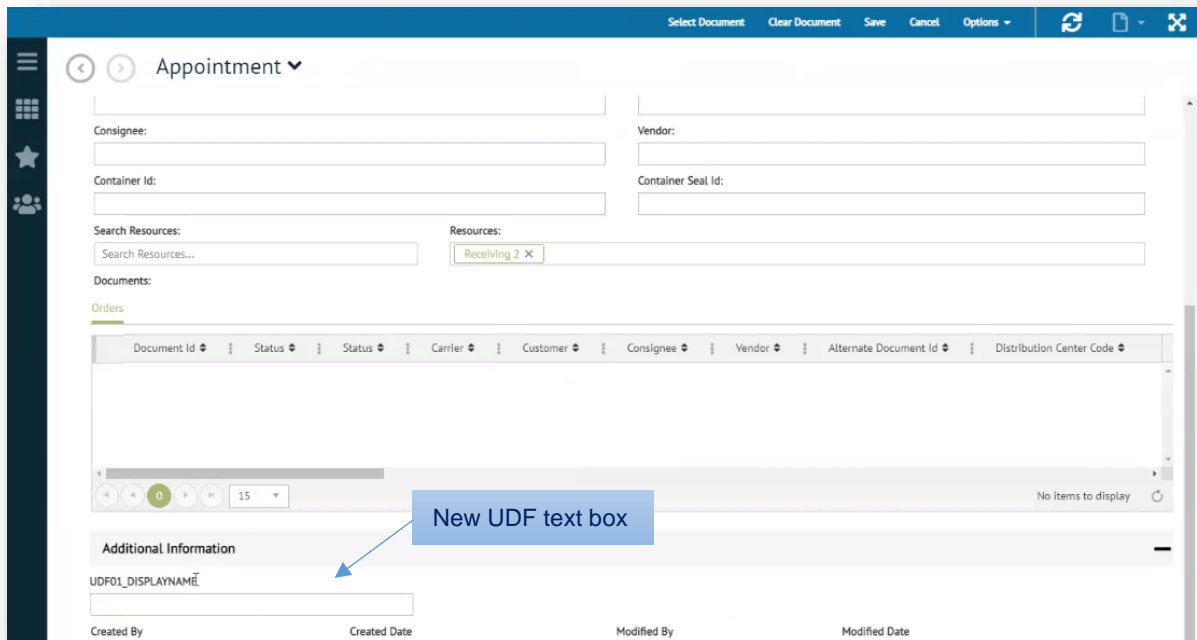
New UDF record

Note that it may be necessary to log out and then back into Foundry for the new UDF to become visible in the application.


- Open the **Main Schedule View** in Schedule.
The new field/column is listed at the end of each appointment record on the **Appointments** grid.




When you add or edit an appointment, you will be able to enter data in the new UDF text box, which has been placed under **Additional Information** at the bottom of the **Appointment** editor.



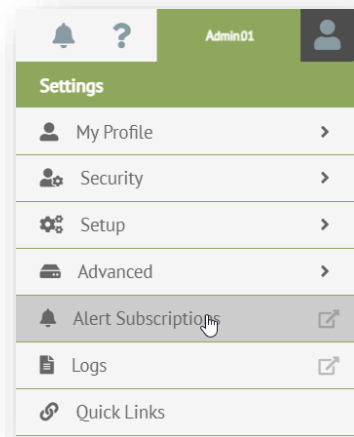
Alert Subscriptions


Alerts provide notifications when specified events occur in TrueCommerce Foundry applications. This functionality in Foundry allows you to set up the criteria for event-triggered alerts and determine which follow up action should happen once they occur. For example, the alert may place a notification under the Foundry on-screen  control, send a text or email, activate a workflow, or run a SQL script.

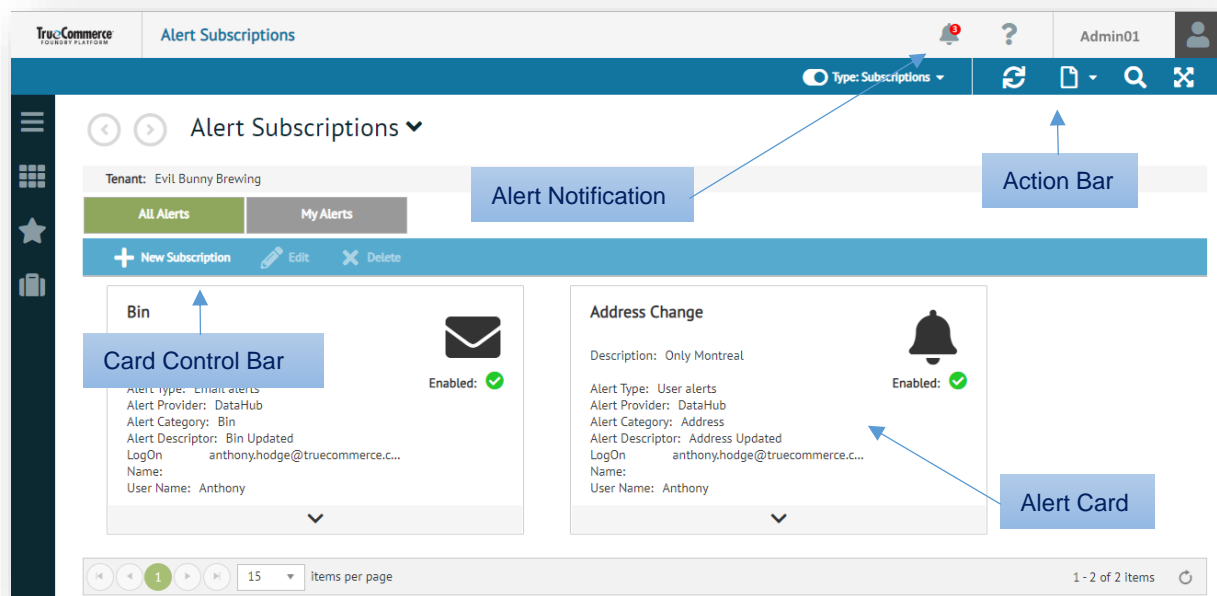
Alert Subscriptions Page

Alerts are set up and maintained via the **Alerts Subscriptions**  page, which contains tabs for **All Alerts** (tenant wide alerts) and **My Alerts** (user specific alerts). To access **Alerts Subscriptions**:

1. Click your username / profile picture on the top right corner of the Foundry page header.



2. Select **Settings > Alert Subscriptions** from the drop-down menu to launch the **Alert Subscriptions**  page. Existing alert cards are displayed under the **All Alerts** and **My Alerts** tabs.



From here you can set up and maintain the criteria for event-triggered alerts, as described in the sections that follow.

Creating Alerts

To create an alert subscription:

1. From the [Alert Subscriptions Page](#), select **+ New Subscription** on the alerts control bar to launch the **New Alert Subscription** editor. The editor walks you through the tabbed [General](#), [Filters](#), [Parameters](#), [Content](#), and [Summary](#) panels for defining a new alert subscription:


General

2. Fill in **General** details as per the field descriptions in Table 16. Field options in this panel are cascading, which means that the option you select in one field may change the list of options available in subsequent fields.
3. Click **Next** to advance to the **Filters** panel. Otherwise, you can click **Finish** to exit the editor.

Table 16: Alert Subscription General Settings

Field	Description
I want to alert to ...	<i>Mandatory.</i> Drop-down list of alert actions, including trigger a workflow, show an on-screen notification, send an email, send an SMS message, run a SQL script. Note that the Parameters panel is required to accomplish the action selected in this field.
Generate an Alert in ...	<i>Mandatory.</i> Drop-down list of installed applications. <i>The application you select here determines the options available in subsequent fields.</i>
When the	Drop-down list of alertable events associated with the application selected in the previous field.
Use Template	Checkbox to switch the next field from Has been to Templates .
Has been Templates	<i>Mandatory.</i> Drop-down list of options to complete the 'When the' statement, either Has been or Templates depending on the selection in the previous checkbox.

Filters

- If you want to add filter criteria to the alert, click on the  control to select from properties based on the application you selected in the second field of the [General](#) panel.

- Highlight one of the properties listed in the **Select Property** dialog and click **Select**.

- Complete the statement by adding a filter rule (and value if necessary) for the selected property.
- Click **Add** to submit the statement using the filter criteria you selected.

The assembled statement displays at the bottom of the **Filters** panel to indicate that your filter criteria has been added to the alert.

The screenshot shows the 'New Alert Subscription' interface in the 'Filters' panel. The 'Advanced' tab is selected. A 'Filter Code Editor' is visible, showing the assembled statement: '[newitem].Active' Equals To true. The interface includes navigation tabs (General, Filters, Parameters, Content, Summary), a 'Basic/Advanced' toggle, a 'Filter Code Editor' with an 'Add' button, a list of filter items with 'Edit' and 'Delete' actions, and a list of assembled statements. At the bottom are 'Back', 'Next', 'Cancel', and 'Finish' buttons.



NOTE

You have the option to click the **Advanced** control if you want to select a property and write the statement 'manually' using the filter code editor.



- Click **Next** to advance to the **Parameters** panel. Otherwise, you can click **Finish** to exit the editor.

Parameters

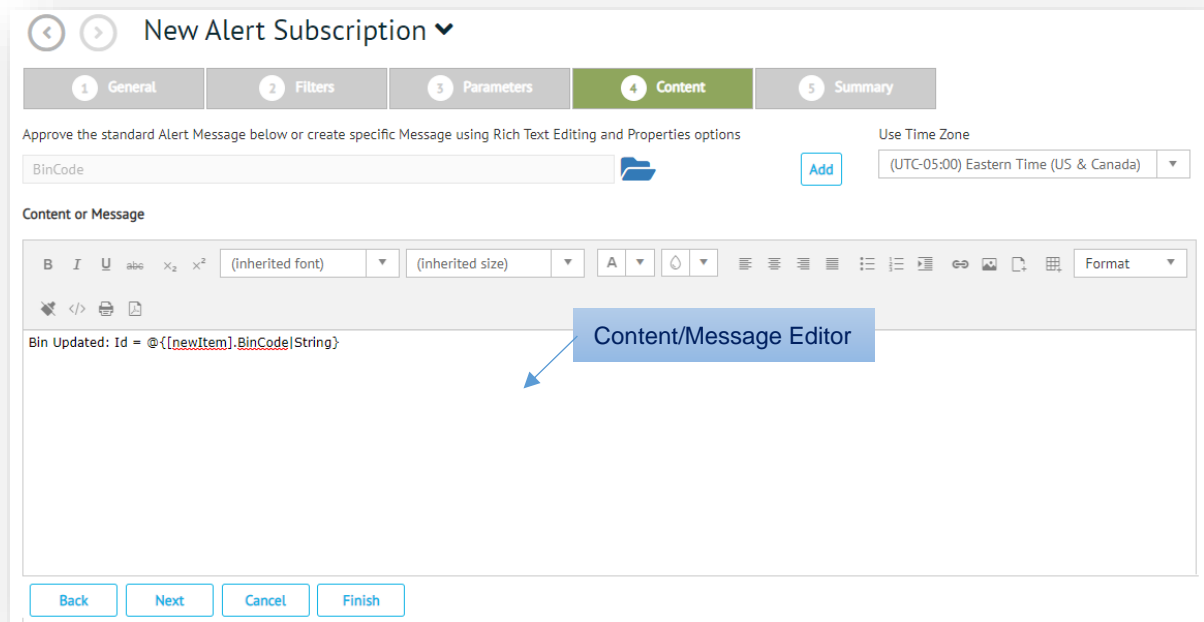
The screenshot shows the 'New Alert Subscription' interface in the 'Parameters' panel. The 'Parameters' tab is selected. The screen prompts the user to enter deliverer parameters. A 'Select Property to Apply' field shows 'BinCode' with an 'Add' button. Below is a 'Database connection string' field. At the bottom are 'Back', 'Next', 'Cancel', and 'Finish' buttons.

- Fill in any parameters that may be required to accomplish the action following the alert. The parameter fields and options available depend on which type of action is selected under 'I want to alert to ...' in the [General](#) panel, as outlined in Table 17, below.
- Click **Next** to advance to the **Content** panel. Otherwise, you can click **Finish** to exit the editor.

Table 17: Alert Parameter Options

Action	Parameter Options
trigger a workflow	Select from a list of available workflow definitions
show an on-screen notification	Enter delivery parameters Payload Header and Payload Preview in the fields provided
send an email	Select recipient email addresses and then enter a subject line for the resulting message.
send an SMS message	Click on the  control to select from properties based on the application you selected in the General panel and then enter the phone number where the message is to be sent.
run a SQL script	Click on the  control to select from properties based on the application you selected in the General panel and then enter the database connection string for the SQL script.


Content



New Alert Subscription






1 General 2 Filters 3 Parameters 4 Content 5 Summary





Approve the standard Alert Message below or create specific Message using Rich Text Editing and Properties options

BinCode  Add

Use Time Zone
(UTC-05:00) Eastern Time (US & Canada)

Content or Message


B I U abc x₂ x² (inherited font) (inherited size) A      Format

Bin Updated: Id = @{{newItem}.BinCode|String}

Content/Message Editor

Back Next Cancel Finish

- Submit content for the alert message by editing the generated option provided and/or by adding your own message text.
To create your own message, click on the  control to select from properties base on the application you selected in the [General](#) panel and then enter your own text to the string using the content/message editor.
- Click **Next** to advance to the **Summary** panel.

Summary

The screenshot shows the 'New Alert Subscription' form with the 'Summary' tab selected. The form is divided into five tabs: General, Filters, Parameters, Content, and Summary. The 'Summary' tab is highlighted in green. The form contains the following fields and sections:

- Alert Name:** Bin
- Description:** Bin Updated
- Review your Alert information below:**
 - Generate an Alert in ...:** DataHub when the Bin has been Bin Updated
 - I want the Alert to:** User alerts
 - Applied Filters:** "[newItem].Active" Equals To true
 - Parameters:**
 - Payload Header:** Bin Alert
 - Payload Preview:** Bin Alert Preview
 - Time Zone:** Eastern Standard Time
 - Message:** Bin has been changed to 'active' &@[[newItem].BinCode|String]
- Buttons:** Back, Next, Cancel, Finish

13. Enter an optional name and description for the alert subscription.
14. Review details of the alert entries and then click **Finish** to exit the editor. The newly created role is added to the [Alert Subscriptions Page](#).

Editing Alerts

To edit an existing alert subscription:

1. Select the alert you want to update on the [Alert Subscriptions Page](#).
2. Click **Edit** on the card control bar to launch the **Edit Alert Subscription** page.
3. Update the necessary settings in the [General](#), [Filters](#), [Parameters](#), [Content](#), and [Summary](#) panels as described under [From here](#) you can set up and maintain the criteria for event-triggered alerts, as described in the sections that follow.
4. Creating Alerts.
5. Click **Submit** on the action bar to save the updated alert and exit the editor.

Deleting Alerts

To delete an alert subscription:

1. Select the alert you want to update on the [Alert Subscriptions Page](#).
2. Click **Delete** on the card control bar.
3. When prompted, click the **Delete** button to confirm that you intend to delete the selected alert.

The deleted alert is removed from the [Alert Subscriptions Page](#).

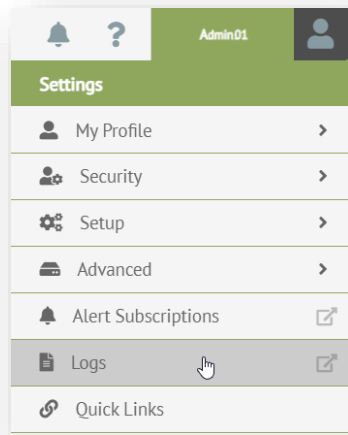
Logs

As administrator, you may need to use the **Log Viewer** to troubleshoot flagged events related to the applications and services installed on your TrueCommerce Foundry system.

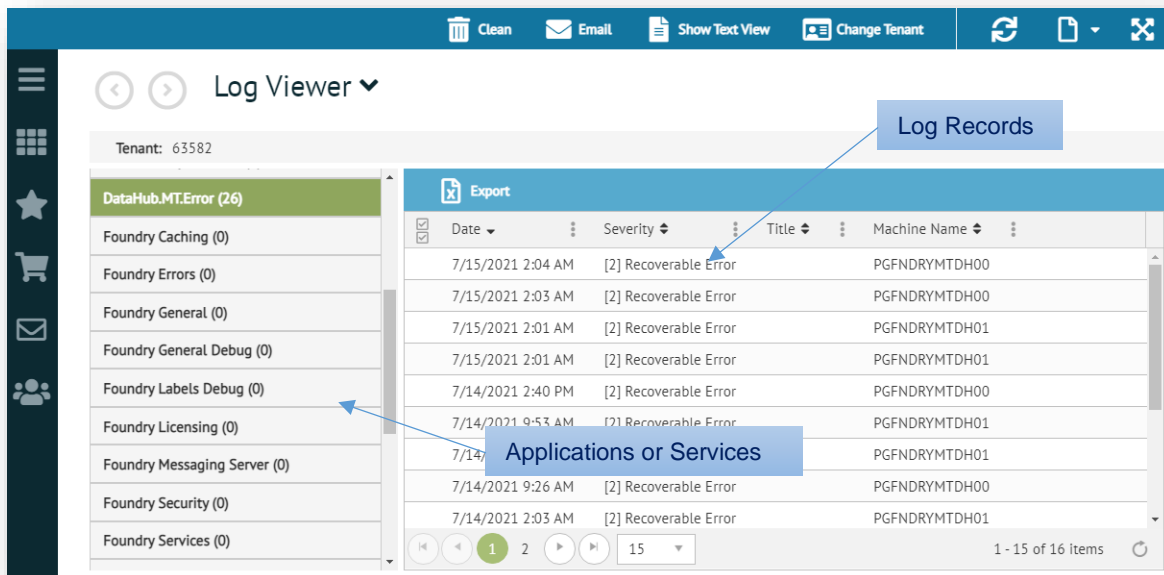
Log Viewer

To navigate and view logs in the **Log Viewer**:

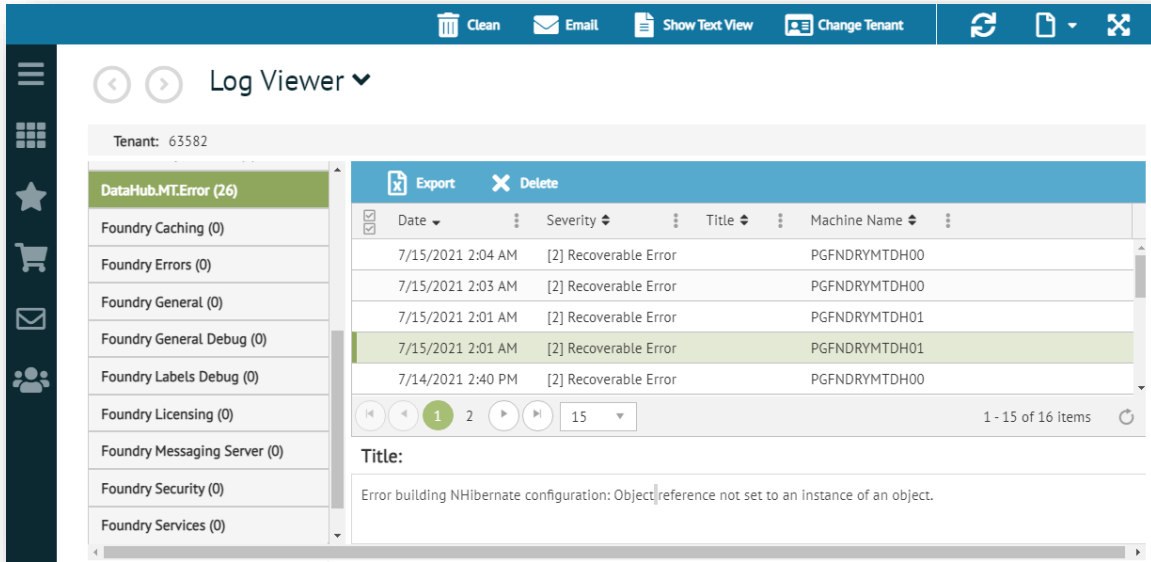
1. Click your user name / profile picture on the top right corner of the Foundry page header.
2. Select **Settings** from the drop-down menu.



3. Select **Logs** to launch the **Log Viewer**. The viewer lists all the applications and services deployed on your system.



4. Use the navigation menu on the left of the **Log Viewer** panel to access the log generated for a specific TrueCommerce Foundry application or service.

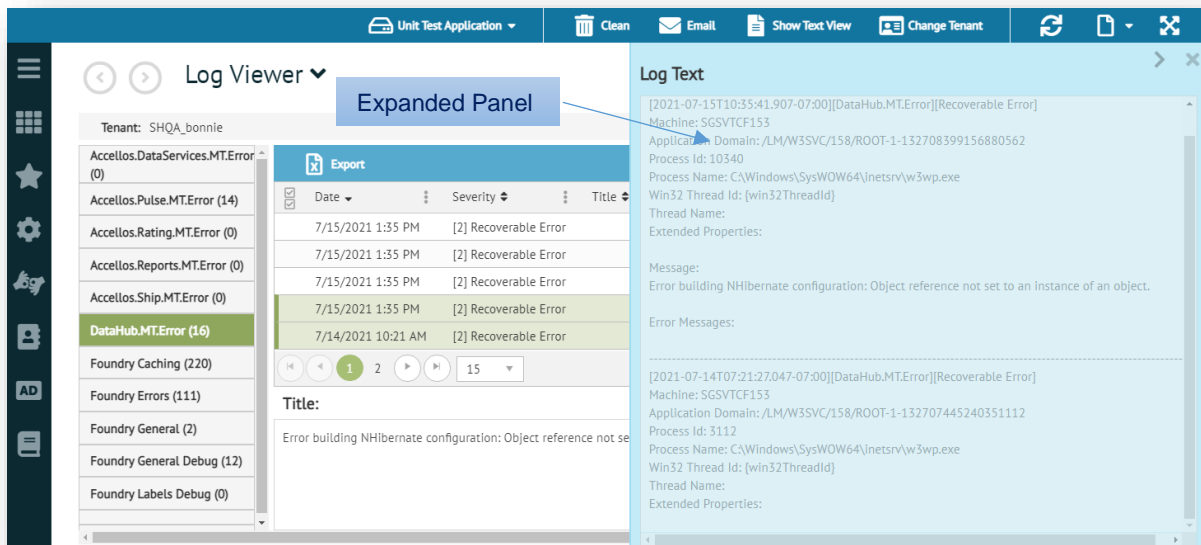


From here, you can click on a record to view a summary message of the logged event, display full details, email selected logs, and clean up records on the grid, as described in the sections that follow.

Show Text View

To display full log details in the **Log Text** panel.


1. In the [Log Viewer](#), use the navigation menu to access the log generated for a specific TrueCommerce Foundry application or service.
2. Select one or more log records from the grid.
3. Click **Show Text View** on the **Log Viewer** action bar to expand the **Log Text** panel on the right side of the workspace. This displays log text for each of the selected records.

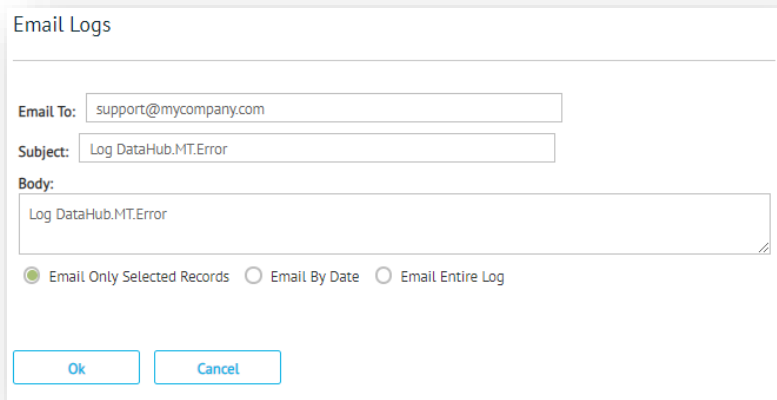


If you click **Show Text View** before selecting any log records, the **Log Text** panel displays log text for all records in the grid. If you click **Show Text View** before selecting an application or service, the **Log Text** panel will be blank.

Emailing Log Records

To share selected logs via email:

1. In the [Log Viewer](#), use the navigation menu to access the log generated for a specific application or TrueCommerce Foundry service.
2. Select one or more log records from the grid.
3. Click  **Email** on the **Log Viewer** action bar to launch the **Email Logs** dialog.

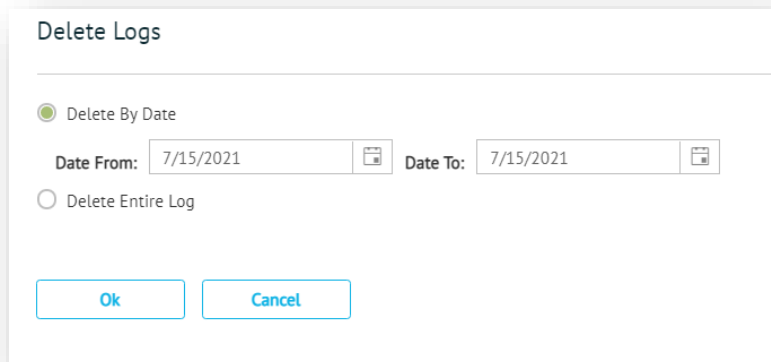


4. Fill in your email details and then choose from the options to email the log records that are currently selected, define a date range, or package the entire log.
5. Click **OK** to deliver the message containing the selected log records.

Cleaning Logs

To delete log records across all applications and services:

1. Click the  **Clean** control on the [Log Viewer](#) action bar to launch the **Delete Logs** dialog.



2. Choose a cleaning method and then click **OK**:

Delete by Date

This deletes any records in your application and service logs that fall within the date range defined.

Delete Entire Log

This empties all application and service logs.

Deleting Selected Records

To delete selected log records:

1. In the [Log Viewer](#), use the navigation menu to access the log generated for a specific TrueCommerce Foundry application or service.
2. Select one or more log records from the grid.
3. Click **✕ Delete** on the grid control bar.
4. When prompted, click the **Delete** button to confirm that you intend to delete the selected log records.

The deleted records are removed from the grid.

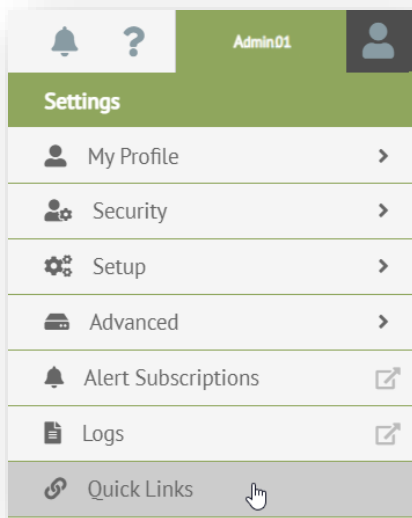
Quick Links

Creating quick links under Administrator account credentials adds quick links to the menu bar that will display for all users. Use them to customize your Foundry navigation to reflect the needs of your business operation. Only Administrators can rename or delete administrator-created links, not your users.

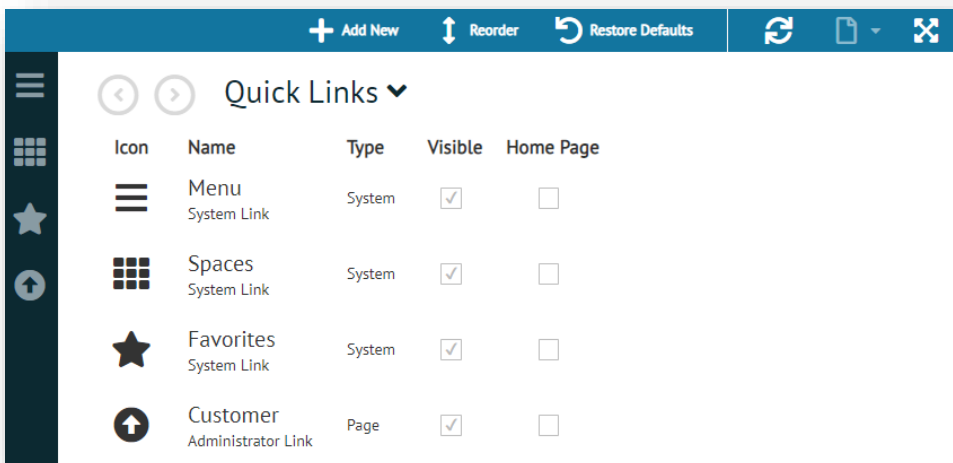
Quick Links Page

Quick links are created and maintained via the **Quick Links** ▾ page:

1. Click your username / profile picture on the top right corner of the Foundry page header.
2. Select **Settings** from the drop-down menu.



3. Select **Quick Links** from the drop-down menu to launch the **Quick Links** ▾ page.

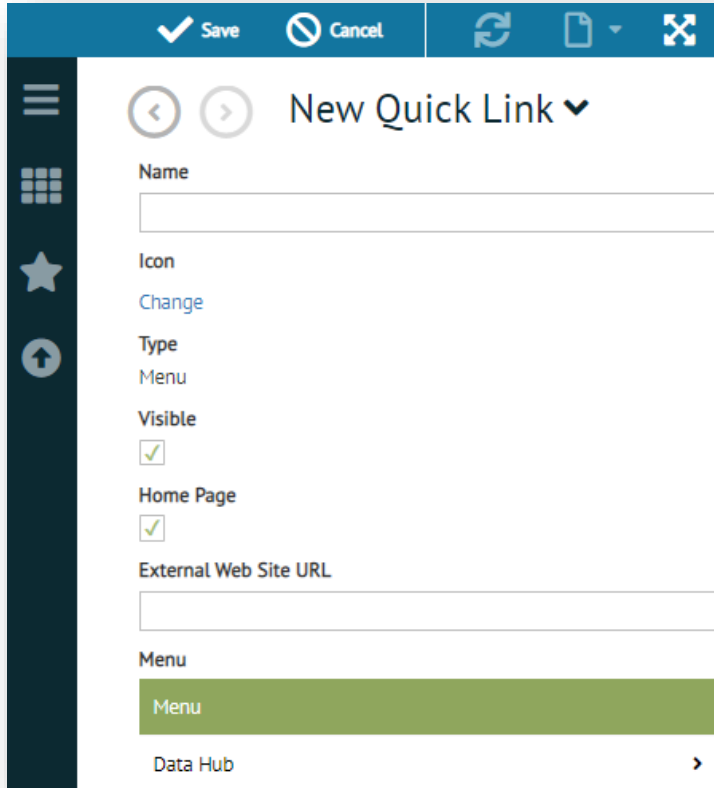


From here you can set up, rename and delete administrator-created quick links, as described in the sections that follow.

Creating Quick Links

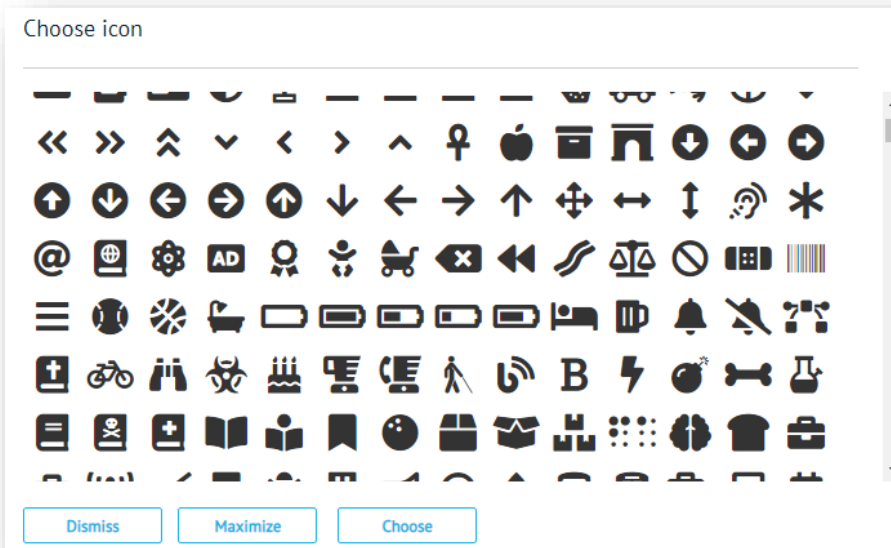
To create a quick link:

1. On the [Quick Links Page](#), select **+ Add New** on the action bar to launch the **New Quick Link** editor.
2. Type in a unique **Name** for this quick link.



The screenshot shows the 'New Quick Link' editor interface. At the top, there are buttons for 'Save', 'Cancel', and a refresh icon. Below the title 'New Quick Link', there are several fields and options: 'Name' (a text input field), 'Icon' (with a 'Change' link), 'Type' (set to 'Menu'), 'Visible' (checked), 'Home Page' (checked), 'External Web Site URL' (a text input field), and 'Menu' (a dropdown menu currently showing 'Menu'). At the bottom, there is a 'Data Hub' section with a right-pointing arrow.

3. Select **Change** to select an Icon for the quick link.
This invokes the **Choose Icon** dialog.



- Select an icon from the options available and click **Choose** to exit the dialog.
The icon is assigned to the quick link.
- Fill in the remaining fields required for your implementation as per the descriptions in Table 18.
- Click **Save** on the action bar to save the new link and exit the editor.
The newly created quick link is added to bottom of the list on the menu bar.

Table 18: Quick Link Settings

Field	Description
Name	<i>Mandatory</i> – Name of the quick link.
Icon	<i>Mandatory</i> – Icon assigned to the quick link. Click Change to invoke the Choose Icon dialog.
Type	<i>Automatic</i> – Link type based on the destination selected, web page or menu
Visible	Check box to indicate that the quick link is visible. Deselect to hide the icon on the menu.
Home Page	Check box to indicate that Foundry will open to the link when you exit this editor.
External Web Site URL	URL of an external web site as destination.
Menu	Menu link as destination.

Reordering Quick Links

To reorder quick links on the menu bar:

- On the [Quick Links Page](#), click **Reorder** on the action bar.
Only Administrator Links can be moved.
- Click to highlight each link you want to move, and then drag it up or down to a new location.
- When your quick links are in the preferred order, click **Save** on the action bar.
The reordered quick links display on the menu bar.

Editing Quick Links

To edit an existing quick link:

- On the [Quick Links Page](#), double click on the quick link you want to edit.
This displays the current details of the link.
- Click **Edit** on the action bar to make the details editable.
- Update the necessary fields as per the descriptions in Table 18.
- Click **Save** on the action bar to save the updated link and exit the editor.

Deleting Quick Links

To delete a quick link:

1. On the [Quick Links Page](#), double click on the quick link you want to delete.
This displays the current details of the link.
2. Click **✕ Delete** on the action bar.
3. When prompted, click the **Delete** button to confirm that you intend to delete the selected quick link.
The deleted quick is no longer listed on the [Quick Links Page](#) and is removed from the menu bar.



NOTE

You can remove links from the menu *temporarily* by deselecting the **Visible** check box when [Editing Quick Links](#). Invisible links remain listed on the [Quick Links Page](#).

