

User Guide for Administrators

PocketCred allows users to upload their CDC card information to receive their custom Health Check QR Code. The Health Check QR Code can be accessed through any browser stored on a mobile device or printed as a PDF, and is used by credential holders to confirm their vaccine status with administrators. This user guide is intended to walk the user through the process of setting up your organization, inviting users and assigning roles, and reviewing credential submissions.

Registration:

This section walks through the process of creating a PocketCred account.

- 1) Open the PocketCred Invitation email and open the hyperlink to the PocketCred website, highlighted in blue. This redirects you to the Registration page of the PocketCred website.
- 2) Complete the registration form and submit. Use the same email that the invitation email was delivered to.
- 3) Verify your email by following the message prompts.
- 4) Select Home. This redirects you to the home page, indicating successful registration.

User Profile:

Selecting User Profile from the side menu redirects you to your account details, including your User Profile, Roles, and User ID's. Here, you can update your personal details as well as customize your Light and Dark Mode settings with the sun and moon icon in the upper right-hand corner. To review the various roles and their access, see [here](#).

My Organization Setup:

Upon registering, you may get started managing your organization. Navigate to the Organization page from the side menu.

The following page introduces the basic customization feature of PocketCred.

Organization basic setup page:

Organization: ACME

1. Users >

2. Invites >

3. Trust Network

4. Privacy

5. Manual Uploads

6. MyIR

Trust Network

VCI Network

Trust Smart Health Cards issued by the [VCI Network](#).

Privacy

Privacy Statement ?

By checking this box, I agree to share this information with Pravici LLC.

Manual Uploads

MyIR

@ Auto-Approved Domains

Billing

1. Allows the PocketCred Verifier to verify QR codes generated by other trusted entities
2. Customize the privacy statement here
3. Allows users to manually input their CDC card information
4. Allows users to confirm their credentials by signing into MyIR*
5. Allows users with a specified email domain to join your organization automatically*
6. Allows for automatic billing*

*only available for organizations subscribed to the Enterprise Plan

Invites:

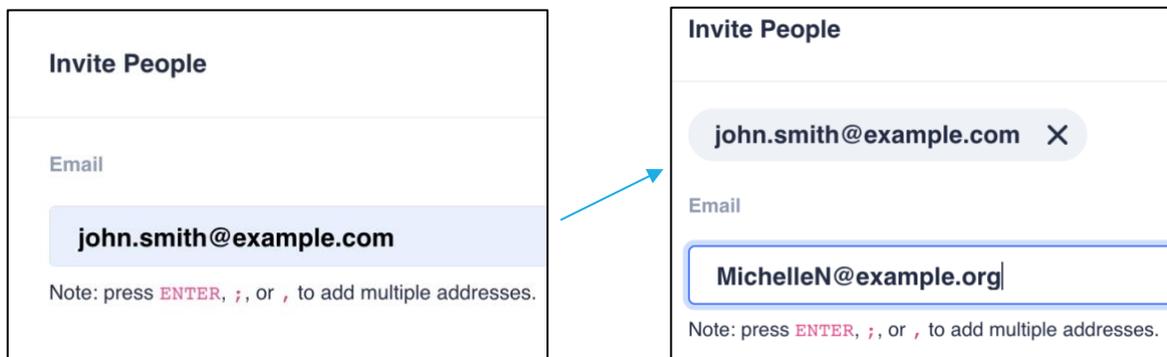
Navigate to Invites within the Organization Settings page. This opens a list view of all the users who have been invited to join the organization. Switch between the Pending and Accepted tabs to review Users' join status.

Invite Users:

Selecting Invites from the Organization Setting page redirects you to a list of all the current pending and accepted invitations to the organization.

There are three ways a user can join your organization:

- 1) Invite a specific email
 - a. Select the Invite People button in the upper right-hand corner.
 - b. Input the email of the user you would like to invite and hit enter. The email you just entered moves out of the text box, allowing you to enter the next email. If a mistake was made while typing, simply select the x to delete the entry.



- c. Once you have input all of the users you would like to invite, select the Invite button to send them an invitation email.
- 2) Share an invitation URL
 - a. Select the Invite People button in the upper right-hand corner.
 - b. Select the Copy Invite Link button.

You can customize the invite link by adding an expiration period or limiting the number of users that can join with the link. Deactivating the link makes the link invalid from further use.
 - c. Send the invitation URL to the users you would like to invite to the organization. They will be prompted to join the organization after registration.
- 3) Set up email domain (only available for organizations enrolled in the Enterprise plan). This feature allows any user with the specified domain to automatically join your organization.
 - a. Navigate to My Organization from the side menu.

- b. Toggle the @ Auto-Approved Domains to enable the feature.
- c. Enter the domain that you would like to pre-approve and hit enter.
- d. When you are finished adding domains, select Save. To cancel automatic approval of domains, either toggle the feature off or select the x by the domain name.

Users:

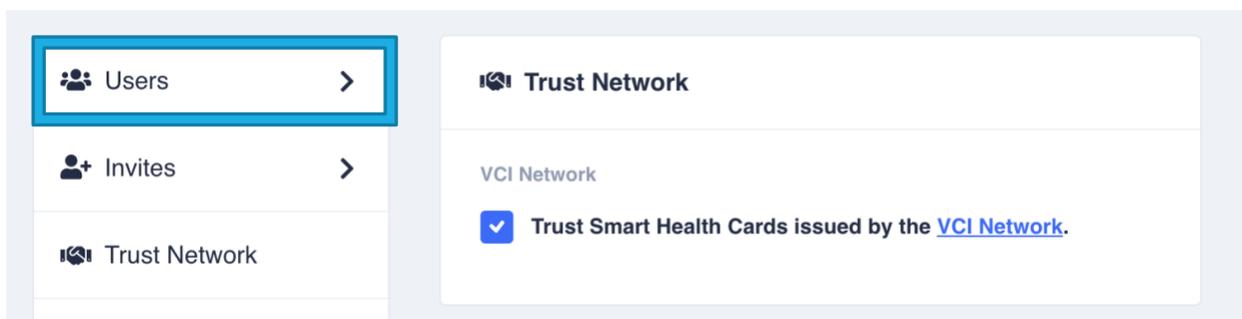
Navigate to Users within the Organization Settings page. This opens a list view of all of the users who have joined your organization, whether they have verified their email and the roles that they have been assigned. The green check indicates that the user has been verified.

#	✓	Email	Display Name	Roles	
1	✓	acme.approver@pravici.com	ACME Approver	case:read	

Self-manage, Assign Roles:

This section walks through the process of assigning roles to users. To review the various roles and their access, see [here](#).

- 1) Login to PocketCred.
- 2) Navigate to My Organization from the side menu.
- 3) Select Users within the Organization Settings. This opens a list view of all the users who have joined your organization.



- 4) Locate the user whose roles you would like to edit, and select the edit button on the far right. This opens a window, with two drop down options.
- 5) Specify the roles and select update. The Roles tags update. You may select the X to delete a role. A user may only have two active roles, one for the Case category and another for the Org category.
- 6) Select Save to implement the change.

Roles

case:read X

Role Name: Organization

Role Value: Role Value

UPDATE

Read

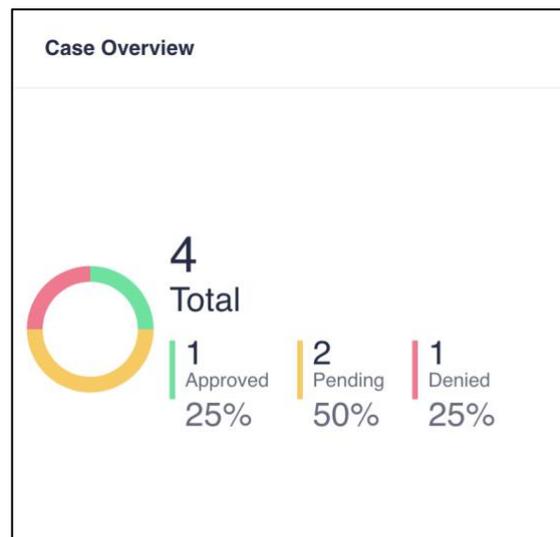
Write

Admin

SAVE

Dashboard:

Selecting the Dashboard from the side menu provides an overview of all credential confirmation submission, showing the stats of pending, approved, and denied cases.



Review Credential Submissions:

This section walks through the process of reviewing credential submissions.

1. Log in to your PocketCred account
2. Reveal the side menu by selecting the hamburger icon in the upper left-hand corner.
3. Select Cases.
This reveals a page that lists all of the credential submissions. You can switch between lists of Approved, Pending, and Denied cases by toggling the buttons in the top right of the card.
4. To review a case, select the case number. A case contains the user's personal information, vaccine information, and photo uploads. Enlarge photos by clicking on the photo you want to view. To minimize, either select the X in the upper right corner or click anywhere outside of the photo box. Compare the information in the photo uploads with the provided information.
 - a. Approve Request:
 - i. If all information provided matches the information presented in the photo uploads, select Approve for each card.
 - ii. Once all Approve cards have been approved, you can then select Approve Request.
This sends an email notification to the user that their credential has been approved, issuing them their custom Health Check QR Code.
 - b. Deny Request:
 - i. If any information provided is not correct or invalid, select Deny Request.

COVID Verifier:

COVID verifier used to scan and verify the Health Check QR Codes that have been processed in your organization.

- 1) Access the COVID Verifier at beta.pocketcred.com/covid-vaccine-verification
OR select the Open Smart Health Card Verifier at login
OR after login, select COVID Verifier from the Links section from the side menu
- 2) Select Open Camera or Use Scanner to begin scanning the Health Check QR Code
- 3) Upon scanning, a success or fail message will be returned with details of the credential.

Roles:

A user's role defines their authorization access to the organization. The following tables outline the functions accessible to each role. A user not assigned with a role can only upload credentials.

Case	case:read	case:write	case:admin
View "Dashboard"	✓	✓	✓
View "Cases"	✓	✓	✓
View "Case Details"	✓	✓	✓
Approve case		✓	✓
Deny case		✓	✓

Organization	org:read	org:write	org:admin
View "My Organization"	✓	✓	✓
View "Users"	✓	✓	✓
View "Invites"	✓	✓	✓
Update trust network		✓	✓
Update privacy statement		✓	✓
Update manual uploads		✓	✓
Update MyIR		✓	✓
Update auto-approved domains			✓
Update user (roles)			✓
Create invite			✓
Cancel invite			✓
Create invite link			✓
Update invite link			✓
Deactivate invite link			✓