

Pocket Card (Version 1) Application User Guide - Administrator Tool

User Guide for the Pocket Card Application

DRAFT - Version 1.0 - DRAFT

1. Introduction

1.1 Purpose

The Pocket Card (PC) application consists of two components: an administrator tool and a mobile application. The purpose of this document is to familiarize the user with the important features and navigational elements of the PC Administrator Tool.

1.2 Overview

The PC Administrator Tool is a web-based application designed to allow users manage electronic pocket cards. Pocket cards are short and simple information guides covering a variety of topics, making it easy to reference information on-the-go. Each pocket card is assigned a title, keywords, and a location, thereby helping PC mobile application users locate relevant pocket cards. The PC Administrator Tool allows users to add, remove, or update pocket card content files as needed. Updates are then automatically pushed to the mobile application so users receive updates in a timely manner.

1.3 Project References

1.3.1. Information

Point of Contact	Type	Email Address
VA OIT Mobile Development Team	Development Team	[REDACTED]

1.3.2. Coordination

Access to the PC Administrator Tool is dependent upon coordination with the VA's Identity and Access Management (IAM) system. When users navigate to the PC Administrator Tool through its main URL ([https://sta\[REDACTED\]](https://sta[REDACTED])), the IAM screen will appear, prompting users to take action to complete the authentication process. Once validated, users will be redirected to the PC Administrator Tool.

1.3.3. Help Desk

Point of Contact	Type	Phone
WMS Mobile Service Desk	Help Desk	[REDACTED]

1.4 Organization of the Manual

Section 3: Getting Started - This section instructs the user on how to start the application, basic application navigation, and how to exit the application.

Section 4: Scenario - This section provides the user with step-by-step instructions explaining how to perform various application functions.

1.5 Acronyms and Abbreviations

Acronym	Definition
MAE	Mobile Application Environment

or reactivate both User Managers and Card Managers. They also have the ability to create, edit, or delete all pocket cards in the system; therefore, allowing them to manage pocket cards when a Card Manager is unavailable. User Managers can also reassign the owner of a pocket card.

2.3.2 Card Managers

The primary responsibility of a Card Manager is to add, update, and delete pocket cards where they are listed as the owner. Card Managers are, by default, the owners of cards they create. Card Managers can also view, but not edit, cards that are owned by other Card Managers. Card Managers are responsible for keeping card content up-to-date and removing unsafe information in a timely manner.

2.4 Contingencies and Alternate Modes of Operation

Not applicable to the PC Administrator Tool.

3. Getting Started

This section provides a general walkthrough of PC Administrator Tool, from logging into the application, navigating through the main menu options, and exiting the application.

3.1 Logging On

After signing in, Card Managers will be taken to the home screen with the card management user interface displayed. User Managers will be taken to the home screen with the user management interface displayed. User Managers can easily switch the home screen interface to display the card management interface.

The PC Administrator Tool is designed to function in a desktop browser window. A valid and active VA Active Directory Account and VA PC Administrator Tool account are required to access the PC Administrator Tool.

1. Establish a connection to the VA Network.
2. Access the PC Administrator Tool through its main URL [REDACTED]
3. Complete the VA Identity and Access Management System (IAM) authentication process using one of the following methods:
 - a. VHA Network User ID and Password
 - b. PIV Card
 - c. Windows Authentication (VA Issued Computers Only)

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VA Identity and Access Management System (IAM)

Select Log In Method to Access: [https://](#)

VA Network User ID and Password

Enter your VA Active Directory (AD) user ID (i.e. vhaismsmithj) and password below, then click Login.


User ID

Password

Login

PIV Card

Insert your PIV card into your card reader and click Login. Please enter your PIN when prompted.



Login

Windows Authentication

This option allows you to login using your current Windows session. This option is only available for users logged onto a VA issued computer. Click Login to authenticate.

Login


If authentication failed using your VA Network ID and Password, your PIV card, or for general questions regarding the IAM authentication service, please contact the National Service Desk Support, VBA Philadelphia, at 855-673-4357 (Option 3) or email at ITSC@va.gov.

WARNING
WARNING
WARNING

You have accessed a United States Government computer. Unauthorized use of this computer is a violation of federal law and may subject you to civil and criminal penalties. This computer and the automated systems, which run on it, are monitored. Individuals are not guaranteed privacy while using government computers and should, therefore, not expect it. Communications made using this system may be disclosed as allowed by federal law.

[Department of Veterans Affairs](#) | [Privacy Policy](#)

4. Once successfully authenticated through IAM, users will see the home screen associated with each role.
 - a. User Managers will see the Home Screen - User Management Interface screen.


Pocket Card

[Metrics](#)
[About](#)
[Help](#)
Kevin Donovan


Manage Users

[Home](#)

Search/Filter List:
Search By Id:

Last Name	First Name	ID	Email	Status	Effective Date
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- b. Card Managers will see the Home Screen - Card Management Interface screen.


Pocket Card

[Metrics](#)
[About](#)
[Help](#)
Kevin Donovan

Manage Cards

[Home](#) / [Manage Cards](#)

Search/Filter List:
Search By Title:
Just My Cards: ☒

3.2 System Menu

3.2.1 Primary Navigation Menu

Menu Option	Description	Reference
About	Opens the About screen; provides information about the application	See Section 4.1.1
Help	Opens the Help information; explains the functionality of the application	See Section 4.1.2
Metrics	Opens the Metrics screen; explains the statistics for application usage	See Section 4.1.3
User Name	Displays the current user's name; provides options pertaining to actions for a user's account	N/A
Exit (via User Name)	Exits the user from the VA Pocket Card Administrator Tool The user will still be logged into IAM's SSOi service	See Section 3.4

3.2.2 Home Screen - User Management Interface

The user management interface is only accessible to User Managers.

Menu\Button Option	Description	Reference
Manage Cards	Replaces the user management interface with the card management interface	See Section 4.3
Add User	Opens the User Detail Screen to add a new user	See Section 4.2.1
View User	Opens the selected User Profile Screen to view or edit user information	See Section 4.2.2

3.2.3 User Profile Screen

Menu\Button Option	Description	Reference
Edit User	Activates editing capabilities for the selected user profile (Only visible when the screen is in read-only mode)	See Section 4.2.2
Save User Changes	Saves the changes and returns to read mode (Only visible when the screen is in edit mode)	See Section 4.2.2
Cancel	Discards the changes and returns to previous screen	See Section 4.2.2

3.2.4 Home Screen - Card Management Interface

The card management interface is accessible to both User Managers and Card Managers.

Menu\Button Option	Description	Reference
Manage Users	Replaces the user management interface with the card management interface (Only viewable to User Managers)	See Section 4.2
Add Card	Opens the Card Detail Screen to add a new card	See Section 4.3.1

View Card	Opens the selected Card Detail Screen to view or edit card information	See Section 4.3.2
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3.2.5 Card Detail Screen

Menu\Button Option	Description	Reference
Edit Card	Activates editing capabilities for the card (Only visible when the screen is in read-only mode)	See Section 4.3.2
Show Edit History	Opens the Card Activity screen for the current card	See Section 4.3.5
Card Content Metrics	Opens the card-specific metrics screen; allows users to search for metrics within a specified date range	See Section 4.3.7
Cancel	Discards the actions/changes and returns to previous screen	See Section 4.3.2
Save Card Changes	Saves the changes made to the card and returns the card to read-only mode (Only visible when the screen is in edit mode)	See Section 4.3.2
Download File	Downloads the current content file (Only visible if a content file has been added to the pocket card record)	See Section 4.3.4
Show File	Displays the current content file in a new browser window or tab (Only visible if a content file has been added to the pocket card record)	See Section 4.3.4
Add Content File	A checkbox that activates the content file upload capabilities for a card (Only visible if a content file has not been added to the pocket card record)	See Section 4.3.1 and Section 4.3.2
Replace Content File	A checkbox that activates the content file upload capabilities for a card (Only visible if a content file has been added to the pocket card record) Selecting this option and NOT selecting a new file allows the user to remove the content file	See Section 4.3.2

3.3 Changing User ID and Password

All requests to change VA network passwords, PIV pins, or Windows authentication credentials are outside the scope of the PC Administrator Tool.

In the instance when a user's VA network ID changes, the user should contact the [WMS Mobile Service Desk](#) to request an update to their PC Administrator Tool account information.

3.4 Exit System

1. Click the User Name option from the primary navigation menu to reveal a sub-menu
2. Click on Exit to leave the Pocket Card Administrator Tool application
3. A message will appear confirming the exit from the application

3.5 Special Instructions for Error Correction

Not applicable to the PC Administrator Tool.

3.6 Caveats and Exceptions

Not applicable to the PC Administrator Tool.

4. Scenarios

4.1 General Scenarios

4.1.1 How to learn about the application

To learn more about the PC Administrator Tool, click on About in the navigation menu. The About screen includes information such as the current application version, release date, contact information, etc.

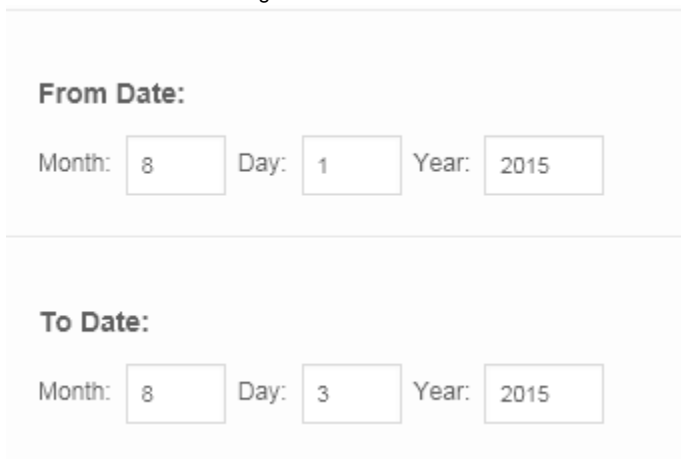
4.1.2 How to get help using the application

To browse help categories for the PC Administrator Tool, click on Help in the navigation menu. The Help screen includes additional application information and guidance.

To seek out additional help, users may also contact the WMS Mobile Service Desk at 1-855-500-2025.

4.1.3 How to view card meta-data metrics

1. To obtain application metrics, click on Metrics in the navigation menu to reveal a drop-down menu.
2. Click on the Card Meta-Data Metrics option to open the metrics search screen.
3. Select the desired date range



The screenshot shows a web form for selecting a date range. It is divided into two sections: 'From Date:' and 'To Date:'. Each section contains three input fields: 'Month', 'Day', and 'Year'. In the 'From Date:' section, the values are Month: 8, Day: 1, and Year: 2015. In the 'To Date:' section, the values are Month: 8, Day: 3, and Year: 2015. The form is light gray with a thin border.

4. Click on the Download Data button to generate the metrics report
5. Open or Save the .csv file containing the metrics report

4.2 User Manager Scenarios

Note: Only users assigned the role of User Manager will be able to perform the following activities.

4.2.1 How to add a new user

1. Navigate to the Manage Users screen
2. Click the Add User button (located at the bottom of the list of current users)
3. Populate the following fields:
 - a. First Name
 - b. Last Name
 - c. Email
 - d. System ID
4. Select the User Type: User Manager or Card Manager
5. Select the Initial Status: Active or Inactive

First Name: *	<input type="text" value="Sample"/>
Last Name: *	<input type="text" value="User"/>
Email: *	<input type="text" value="sample.user@va.gov"/>
System ID: *	<input type="text" value="vhausersample"/>
User Type: *	<input type="text" value="Card Manager"/>
Initial Status *	<input type="text" value="Active"/>
<input type="button" value="Add User"/> <input type="button" value="Cancel"/>	

- Click the Add User button

4.2.2 How to edit a user

- Navigate to the Manage Users screen
- Browse or search the list of current users to locate a user
- Click the radio button to the left of the chosen user
- Click the View User button to open the user profile

<input checked="" type="radio"/>	Williams	Tony	vbahinwillit	tony@va.gov	active	2015-05-28 07:58
						<input type="button" value="View User"/> <input type="button" value="Add User"/> <input type="button" value="Manage Cards"/>

- Click the Edit User button at the bottom of the user profile screen

<input type="button" value="Edit User"/>	<input type="button" value="Cancel"/>
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- Edit the user profile (as needed)
- Once changes are made, click the Save User Changes button

<input type="button" value="Save User Changes"/>	<input type="button" value="Cancel"/>
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4.2.3 How to search for a user

- Navigate to the Manage Users screen
- Define the scope of the search. There are two options to choose from:
 - To search by first name, last name, system ID, or email address, enter the key information into the Search/Filter field

Search/Filter List:	<input type="text" value="vwi"/>	Search By Id:	<input type="text"/>			
<input type="radio"/>	Last Name	First Name	ID	Email	Status	Effective Date
<input type="radio"/>	Williams	Tony	vbahinwillit	tony@va.gov	active	2015-05-28 07:58
						<input type="button" value="Update User"/> <input type="button" value="Add User"/> <input type="button" value="Manage Cards"/>

- To limit the scope of the search, enter the user's system ID into the Search ID field

Search/Filter List:	<input type="text"/>	Search By Id:	<input type="text" value="vbi"/>			
<input type="radio"/>	Last Name	First Name	ID	Email	Status	Effective Date
<input type="radio"/>	Williams	Tony	vbahinwillit	tony@va.gov	active	2015-05-28 07:58
						<input type="button" value="Update User"/> <input type="button" value="Add User"/> <input type="button" value="Manage Cards"/>

4.2.4 How to deactivate a user

1. Navigate to the Manage Users screen
2. Browse or search the list of current users to locate a user
3. Click the radio button to the left of the chosen user
4. Click the View User button to open the user profile

<input checked="" type="radio"/>	Williams	Tony	vbahinwillit	tony@va.gov	active	2015-05-28 07:58
						Update User Add User Manage Cards

5. Click the Edit User button at the bottom of the user profile screen

[Edit User](#) [Cancel](#)

6. Change the value in the Status drop-down menu to Inactive

Initial Status:

Inactive

▼

7. Click the Save User Changes button

[Save User Changes](#) [Cancel](#)

4.2.5 How to edit the owner of a card

1. Navigate to the Manage Cards screen
2. Browse or search the list of current users to locate a user
- Note:** To ensure that the full list of cards is shown, uncheck Just My Cards
3. Click the radio button to the left of the chosen user
4. Click View Card to open the card profile

<input checked="" type="radio"/>	XYZ Card	Card Description	Published	1.3	Changing Owner
					View Card Add Card Manage Users

5. Click the Edit Card button at the bottom of the card profile

[Edit Card](#) [Show Edit History](#) [Card Content Metrics](#)

6. Check the Replace Owner checkbox to reveal a drop down menu box next to the checkbox.
7. Scroll down the list until you locate the new desired card owner
8. Click the name of the desired card owner to make the selection

Owned By: Tony Williams

Replace Owner: ☒ Kevin Donovan

▼

 Select New Owner


9. Update the Version Number and Version Comment fields using the below guidance:
 - a. If the card is previously unpublished and remains unpublished, the Version Number and Version Comment fields are optional
 - b. If the card changes from unpublished to published, the Version Number and Version Comment fields are required

Version:	1.2
Version Comment:	Publishing the card
Current File:	None
Add Content File:	<input checked="" type="checkbox"/> <input type="text" value="C:\Users\ [REDACTED]"/> <input type="button" value="Browse..."/> <input type="button" value="Clear File"/>
Published Status:	<div>Published</div>

c. If the card changes from published to unpublished, only the Version Comment field is required

Version:	1.1
Version Comment:	Unpublishing the card
Current File:	None
Add Content File:	<input type="checkbox"/>
Published Status:	Unpublished

d. If the card is previously published and remains published, the Version Number and Version Comment fields are required

Version:	1.3
Version Comment:	Update the card's tags
Current File:	test.htm
Replace Content File:	<input type="checkbox"/>
Published Status:	Published 

10. Click the Save Card Changes button

Save Card Changes	Cancel
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4.3 Card Manager Scenarios

Note: Users assigned the role of User Manager or Card Manager will be able to perform the following activities.

4.3.1 How to add a new card

1. Navigate to the Manage Cards screen
2. Click the Add Card button (located at the bottom of the list of cards)
3. Complete required card information fields:
 - a. Title (must be less than 50 characters long)
 - b. Description (short summary to describe the card)
 - c. Tags (searchable words or phrases to help identify the card)
 - d. Organization or Office (organization code or office code)

Title:	XYZ Card
Description:	Card Description
Tags:	VHA, Medical
Organization or Office:	VHA

4. Update the Content File, Published Status, Version Number, and Version Comment fields using the below guidance:
 - a. The Published Status for newly entered cards automatically defaults to Unpublished
 - b. A Content File is required for a card to be published (click Add Content File)

5. Click the Save Card button

4.3.2 How to edit a card

Just My Cards: ☒

Card Manager Interface	Card Name	Description	Status	Version	Comments
<input checked="" type="radio"/>	XYZ Card	Card Description	Unpublished	1.0	Comments about this version of the card

1. Click the Edit Card button at the bottom of the card profile screen

Edit Card	Show Edit History	Card Content Metrics	Cancel
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2. Edit the card profile (as needed)
3. Update the Published Status (as needed)
4. Update the Version Number and Version Comment fields using the below guidance:
 - a. If the card is previously unpublished and remains unpublished, the Version Number and Version Comment fields are optional
 - b. If the card changes from unpublished to published, the Version Number and Version Comment fields are required

Version:	1.2	
Version Comment:	Publishing the card	
Current File:	None	
Add Content File:	<input checked="" type="checkbox"/>	<input type="text" value="C:\Users\ [REDACTED] \Desktop\ [REDACTED] .pdf"/> Browse... <input type="button" value="Clear File"/>
Published Status:	<div>Published</div>	

- c. If the card changes from published to unpublished, only the Version Comment field is required

Version:	1.1
Version Comment:	Unpublishing the card
Current File:	None
Add Content File:	<input type="checkbox"/>
Published Status:	Unpublished

- d. If the card is previously published and remains published, the Version Number and Version Comment fields are required

Version:	<input type="text" value="1.3"/>
Version Comment:	<input type="text" value="Update the card's tags"/>
Current File:	<input type="text" value="test.htm"/>
Replace Content File:	<input type="checkbox"/>
Published Status:	<div>Published </div>

5. Click the Save Card button

4.3.3 How to search for a card

1. Navigate to the Manage Cards screen
2. Define the search pool. There are two options to choose from:
 - a. To search all possible cards, uncheck the Just My Cards box
 - b. To limit the search to editable cards, check the Just My Cards box

Just My Cards: ☒

3. Define the scope of the search. There are two options to choose from:
 - a. To search card titles and tags, enter the keyword or phrase into the Search/Filter List field

Search/Filter List:	<input type="text" value="x "/>	×	Search By Title:	<input type="text"/>	Just My Cards: <input checked="" type="checkbox"/>
<input type="radio"/>	Title	Description	Status	Version	Version Comment
<input type="radio"/>	XYZ Card	Card Description	Published	1.3	Changing Owner
				<input type="button" value="Update Card"/>	<input type="button" value="Add Card"/>

- b. To search card titles only, enter the keyword or phrase into the Search Just Title field

Search/Filter List:	<input type="text"/>	×	Search By Title:	<input type="text" value="x "/>	Just My Cards: <input checked="" type="checkbox"/>
<input type="radio"/>	Title	Description	Status	Version	Version Comment
<input type="radio"/>	XYZ Card	Card Description	Published	1.3	Changing Owner
				<input type="button" value="Update Card"/>	<input type="button" value="Add Card"/>

4.3.4 How to view or download the content file for a card

1. Navigate to the Manage Cards screen
2. Browse or search the list of cards to locate a card
3. Click the radio button to the left of the chosen card
4. Click the View Card button to open the card profile

<input checked="" type="radio"/> XYZ Card	Card Description	Unpublished	1.0	Comments about this version of the card
				<button>Update Card</button> <button>Add Card</button>

5. There are two options to choose from:
 - a. Click Show File to view the current card content file
 - b. Click Download File to save the current card content file

<button>Download File</button>	<button>Show File</button>
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4.3.5 How to view the edit history of a card

1. Navigate to the Manage Cards screen
2. Browse or search the list of cards to locate a card
3. Click the radio button to the left of the chosen card
4. Click the View Card button to open the card profile

<input checked="" type="radio"/> XYZ Card	Card Description	Unpublished	1.0	Comments about this version of the card
				<button>Update Card</button> <button>Add Card</button>

5. Click the Show Edit History button

<button>Edit Card</button>	<button>Show Edit History</button>	<button>Card Content Metrics</button>	<button>Cancel</button>
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6. Select the tab associated with the desired card version

Card Activity

Home / Manage Cards / Selected Card / Card Activity

Record 1	Record 2	Record 3	Record 4	Record 5	Record 6	Record 7
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Title: XYZ Card

7. Scroll down to review the card activity

4.3.6 How to publish/unpublish a card

1. Navigate to the Manage Cards screen
2. Ensure the Just My Cards box is checked

Just My Cards: <input checked="" type="checkbox"/>
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3. Browse or search the list of cards to locate a card
4. Click the radio button to the left of the chosen card
5. Click the View Card button to open the card profile

<input checked="" type="radio"/> XYZ Card	Card Description	Unpublished	1.0	Comments about this version of the card
				<button>Update Card</button> <button>Add Card</button>

6. Click the Edit Card button at the bottom of the card profile screen

Edit Card

Show Edit History

Card Content Metrics

Cancel

7. Use the Published Status drop-down menu to change the status to either Published or Unpublished

8. Based on the Publish Status selected:

- a. If Published is selected, update the Version Number and Version Comment fields

Version:	1.2
Version Comment:	Publishing the card
Current File:	None
Add Content File:	<input checked="" type="checkbox"/> <div>C:\Users [redacted] Browse... Clear File</div>
Published Status:	<div>Published</div>

- b. If Unpublished is selected, update the Version Comment fields to describe why the card is being removed

Version:	1.1
Version Comment:	Unpublishing the card
Current File:	None
Add Content File:	<input type="checkbox"/>
Published Status:	Unpublished

4.3.7 How to view card-specific metrics

1. Navigate to the Manage Cards screen
2. Ensure the Just My Cards box is checked

Just My Cards: ☒

3. Browse or search the list of cards to locate a card
4. Click the radio button to the left of the chosen card
5. Click the View Card button to open the card profile

<input checked="" type="radio"/>	XYZ Card	Card Description	Unpublished	1.0	Comments about this version of the card
					Update Card Add Card

6. Click the Card Content Metrics button at the bottom of the card profile screen

[Edit Card](#) [Show Edit History](#) [Card Content Metrics](#) [Cancel](#)

7. Select the desired date range

From Date:

Month: Day: Year:

To Date:

Month: Day: Year:

8. Click on the Download Data button to generate the metrics report

[Download Data](#) [Cancel](#)

9. Open or Save the .csv file containing the metrics report

5. Troubleshooting

5.1 How to delegate my cards to another user?

To delegate, or reassign, the ownership of a card to another user, contact the WMS Mobile Service Desk at 1-855-500-2025.

5.2 How to get a PC Administrator Tool user account?

To obtain a PC Administrator Tool user account, contact the WMS Mobile Service Desk at 1-855-500-2025.

Template last updated 9/10/2014

