# Privoro Fulcrum Cloud Portal Administrator Guide V1.0



PRIVORO®

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# Overview

## The Privoro Portal allows you to manage and monitor your organization's SafeCase™ devices.

Through the Privoro Portal, you can:

- Assign SafeCases to users
- Establish policies governing SafeCase usage
- Push firmware updates to SafeCases
- Monitor SafeCase statuses
- Monitor policy violations

### PORTAL REQUIREMENTS

For the best experience, the Portal should be accessed using the latest version of the Firefox web browser on a desktop/laptop computer.

# Getting started

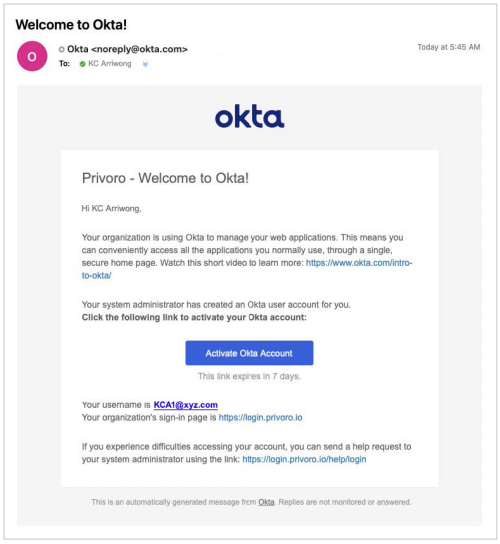
## ACTIVATE YOUR PORTAL ACCOUNT

After your Portal account has been established, you will receive an email from Okta (noreply@okta.com) providing you with a link for activating your account.

**To activate your Portal account:**

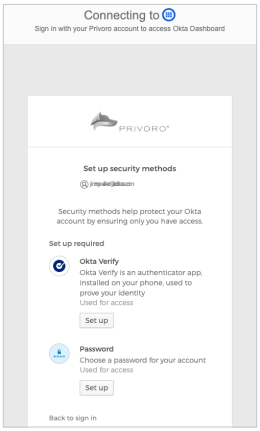
1. In the welcome email, click the link provided.

Note that this link expires after 7 days. If your link has expired, reach out to your Privoro administrator.




The account setup screen will open in your web browser.

2. On the account setup screen, click the **Set up** button under Okta Verify.



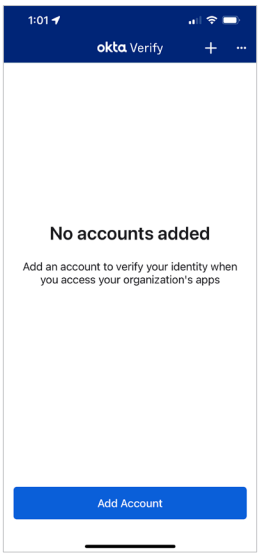

You will be prompted to set up two-factor authentication via the Okta Verify mobile app. The Portal will require you to enter a one-time password (a six-digit code) from this app each time you sign in, in addition to your password.

3. Follow the instructions provided on the screen:

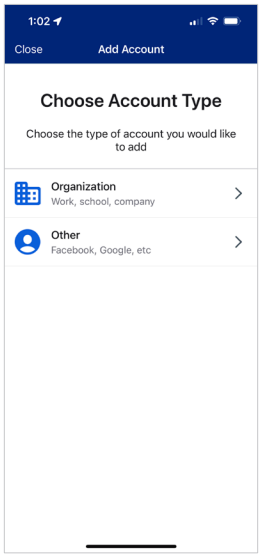
i. If you don't already have Okta Verify on your smartphone, download and install it via your phone's official app store.

ii. In Okta Verify:

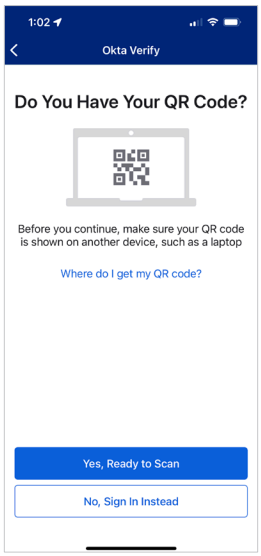
a. On the main screen, tap the **Add Account** button or **plus (+)** icon.



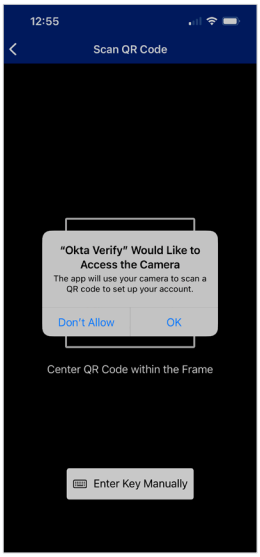
b. On the Choose Account Type screen, tap the **Organization** option.




c. On the Do You Have Your QR Code? screen, tap the **Yes, Ready to Scan** button.

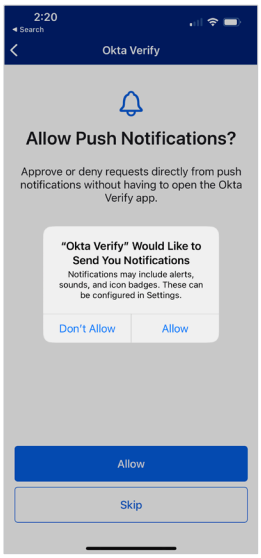


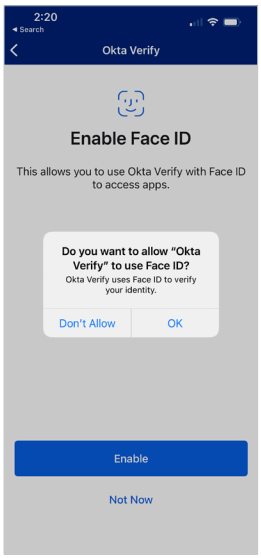

d. If prompted, grant camera access to the app.




e. From the Scan QR Code screen, use your phone's camera to scan the QR code that appears on the Okta setup screen.

f. If prompted, grant/deny access for notifications and/or facial authentication to the app.

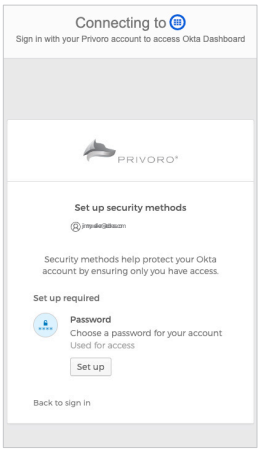



g. On the Account Added screen, tap the **Done** button.

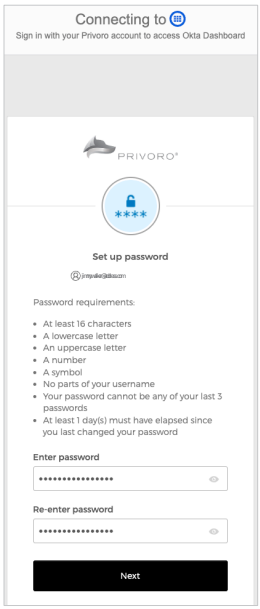
In Okta Verify, the Privoro token will be displayed in the app's main screen. In the Portal, the account setup screen will open.

4. On the account setup screen, click the **Set up** button under Password.




You will be prompted to choose a new password for your Portal account. Your password must be at least 16 characters long and include at least one lowercase letter, one uppercase letter, one number and one special character (+_!@#$%^&*.,?). Consider using a password manager to help you generate a sufficiently complex password.

5. Enter a valid password in both the **Enter password** and **Re-enter password** fields and then click the **Next** button.

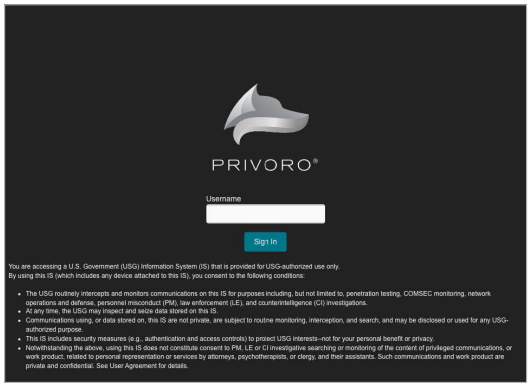



Your Okta dashboard will open.

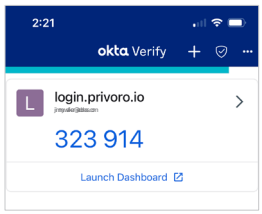
## SIGN IN FOR THE FIRST TIME

**To sign into the Portal for the first time:**

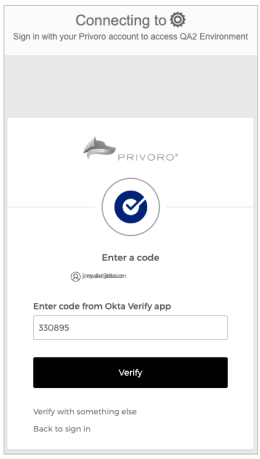
1. Open the Portal in your web browser. If using GovCloud, navigate to https://fulcrum.gc.privoro.com/; if using Commercial Cloud, navigate to https://fulcrum.cc.privoro.com/.
2. On the initial sign-in screen, click the **Sign In** button.



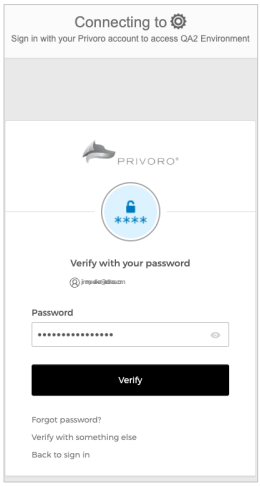

3. On the next screen, enter the one-time password.
   a. In Okta Verify, locate the current six-digit code displayed for the Privoro token. If the code is hidden, tap the eye icon and then authenticate as necessary.



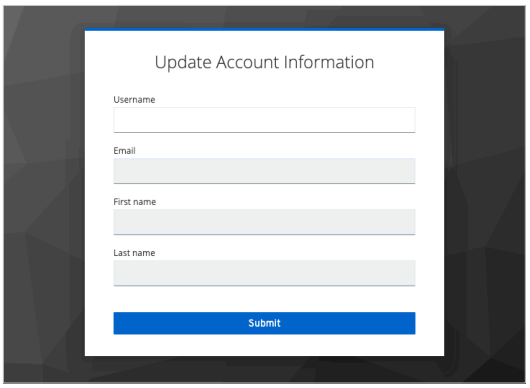
b. In the Portal, enter this six-digit code in the **Enter code from Okta Verify app** field and then click the **Verify** button.




4. On the next screen, enter your password in the **Password** field and then click the **Verify** button.




5. Finally, on the **Update Account Information** screen, enter your email address, first name and last name in the appropriate fields, and then click the **Submit** button.

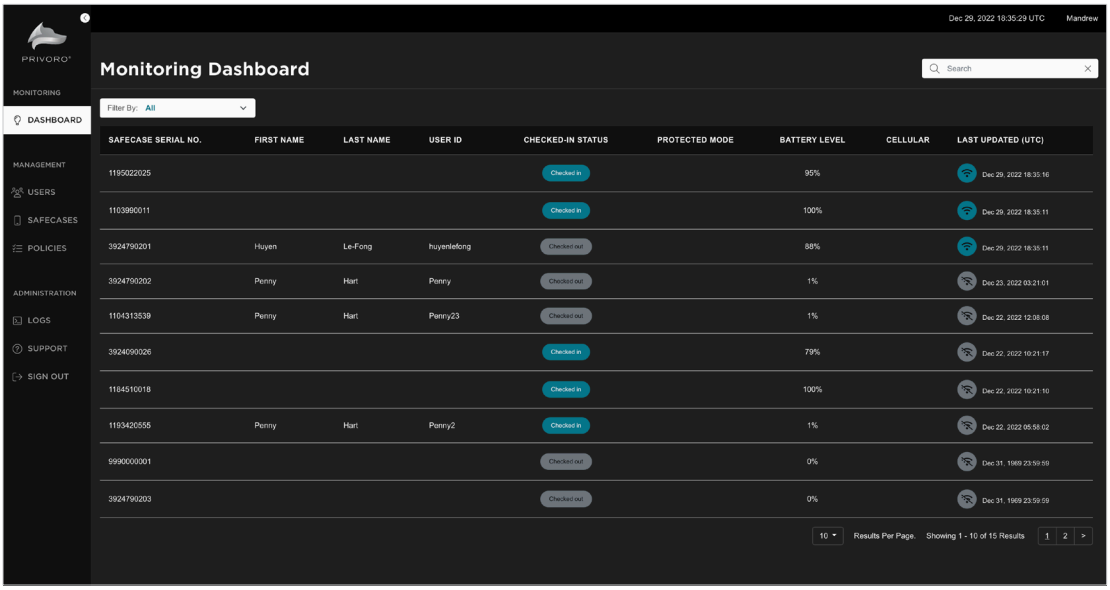



Upon successfully signing in, the Monitoring Dashboard view of the Portal will open.

# Using the Portal

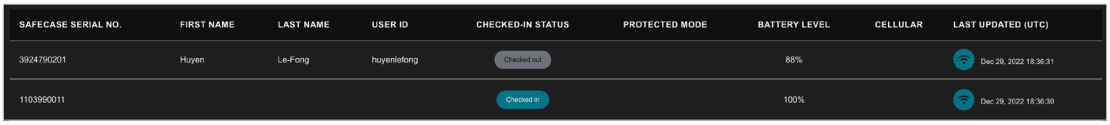
## USING THE MONITORING DASHBOARD

Within the Portal, the Monitoring Dashboard serves as the home screen, presenting key information for monitoring SafeCase activity.

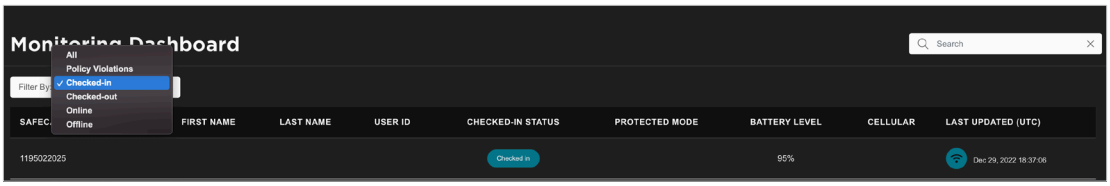


The Monitoring Dashboard lists recent SafeCase event data. Events include policy violations, checking into (or out of) a facility and starting (or stopping) a cloud connection.

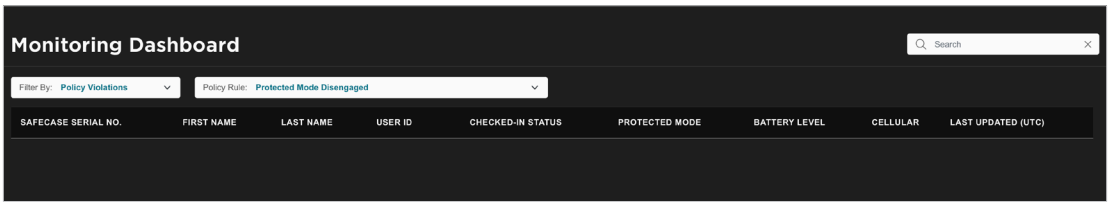
Within the listing for a single event, you can see the associated SafeCase and user along with SafeCase status information for checked-in mode, policy rules violated (if applicable) and most recent cloud connection.




To filter by event type, select it from the **Filter By** dropdown menu.

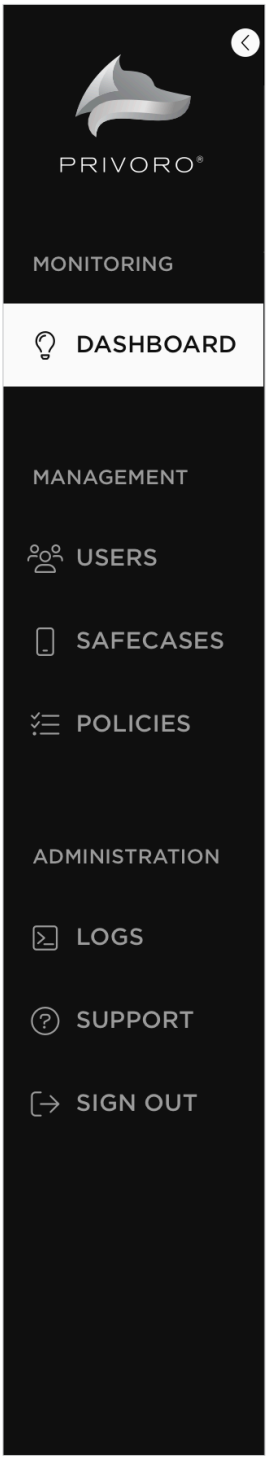



If filtering by policy violations, you can also filter for the policy rule violated by selecting it from the **Policy Rule** dropdown menu.



## NAVIGATE TO OTHER SCREENS

You can use the navigation menu on the left side of the Portal to navigate to other screens.

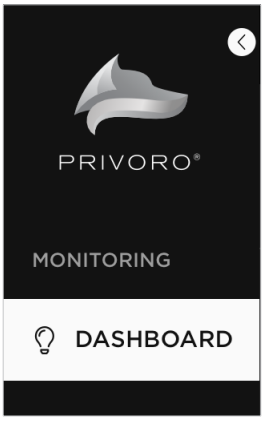



The main screens and their available actions are listed in the following table:

| Screen | Actions |
|---|---|
| Manage Users | • View all users under your supervision<br>• Search for a user<br>• Add a user (individually or in bulk)<br>• Edit or delete a user |
| Manage SafeCases | • View all SafeCases under your supervision<br>• Search for a SafeCase<br>• Assign a user to (or unassign from) a SafeCase<br>• Assign a policy (or unassign from) a user-SafeCase pair<br>• Update firmware for a SafeCase (individually or in bulk) |
| Manage Policies | • View all created policies<br>• Search for a policy<br>• Add a policy<br>• Edit or delete a policy |
| Logs | • View the statuses of bulk actions (user imports and firmware updates) |
| Support & Help | • Submit a support ticket to Privoro |

## MINIMIZE THE NAVIGATION MENU

You can hide the navigation menu if wanting more workspace. To do so, click the left arrow to the upper right of the menu.




To expand the navigation menu back to full size, click the right arrow to the upper right.

## SIGN OUT

To sign out of the Portal, click the **Sign Out** option at the bottom of the navigation menu.

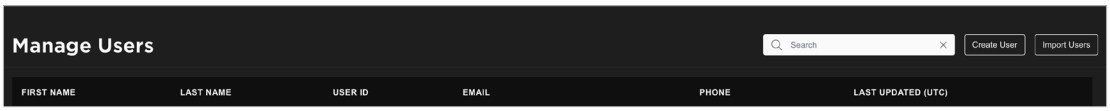
Note that you will be automatically signed out of the Portal after 15 minutes of inactivity.

## WORKING WITH LISTS

Items are displayed in list format throughout the Portal, including on the Manage Users, Manage SafeCases and Manage Policies screens.

## SEARCH WITH A LIST

To search within a list, enter a pertinent search term in the search box. Partial search terms are acceptable.

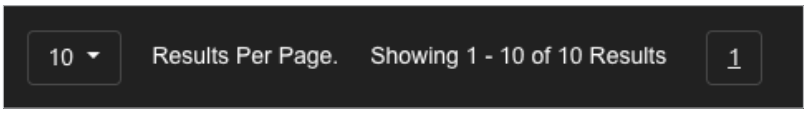



Pertinent search terms are listed in the following table:

| Screen | Search term(s) |
|---|---|
| Manage Users | First name, last name, user ID |
| Manage SafeCases | SafeCase serial number, user ID, policy name |
| Manage Policies | Policy name |

## CHANGE THE NUMBER OF RESULTS DISPLAYED ON EACH PAGE

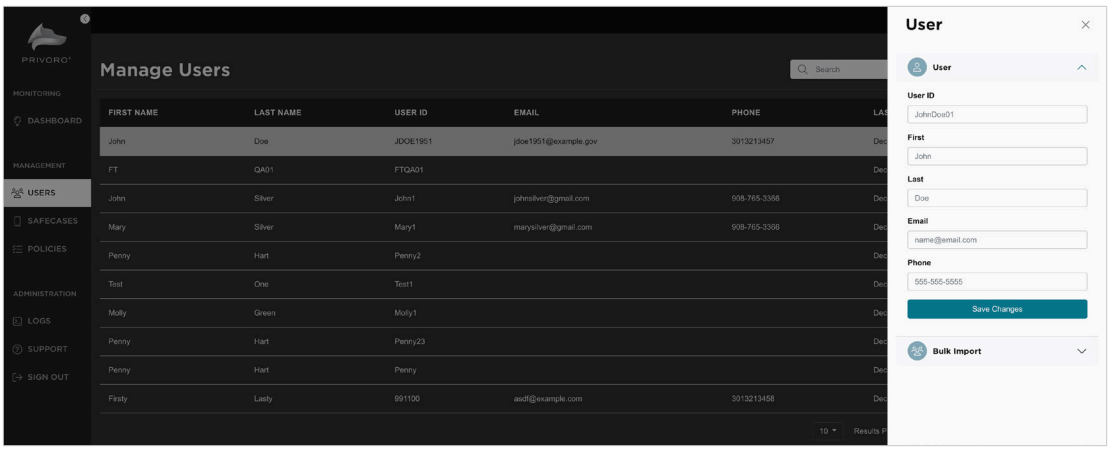
By default, the Portal displays 10 search results per page. If wanting to display more items, select a new number (20, 50 or 100) from the **Results Per Page** dropdown menu below the results.




Changing the number of results per page on one screen will apply the change globally.

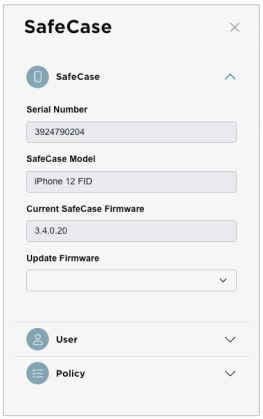
## WORKING WITH DETAIL PANES

Clicking a listing on the three management screens (Manage Users, Manage SafeCases and Manage Policies) will open a detail pane on the right side of the Portal. Here, you can make edits. On a SafeCase detail pane, you can make user and policy assignments.




Within a SafeCase detail pane, you can click a section name to expand that section.

To close the detail pane, you can click the X in the upper right corner or click anywhere on the area to the left of the detail pane.




## RECEIVING SUCCESS MESSAGES

When you have successfully performed an action within the Portal, such as adding a user, a success message featuring a green checkmark will temporarily display in the lower left corner of the screen. You can click the message to discard it; otherwise, the message will disappear after three seconds.

# Initial workflow

The following is a typical workflow for getting your organization up and running with SafeCase:

1. Privoro adds your organization's purchased SafeCases to the Portal upon order fulfillment.
2. You add all of your organization's SafeCase users to the Portal in bulk (see Section 5: Managing users).
3. You assign a user to a SafeCase (see Section 6: Managing SafeCases).
4. You create one or more policies governing SafeCase usage (see Section 7: Managing policies).
5. You assign a policy to each user-SafeCase pair as necessary (see Section 6: Managing SafeCases).
6. Once SafeCases are in use, you monitor for policy violations via the Monitoring Dashboard (see Section 7: Managing policies).

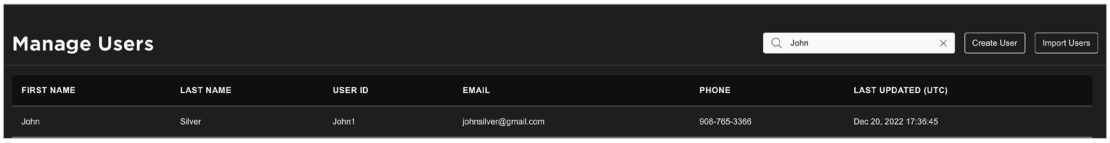
# Managing users

A user is any person who uses or will use a SafeCase.

## VIEW USER INFORMATION

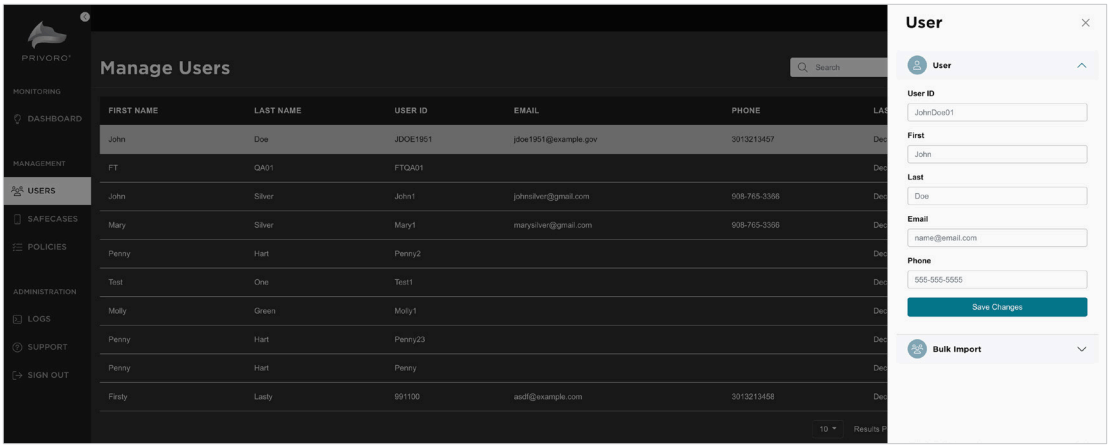
The Manage Users screen lists all of the users under your supervision.

Within the listing for a single user, you can see the person's first name, last name, user ID, email address, phone number and time of last user update.




To view additional information about a user, click the user's listing.

The user's detail pane will open.



## ADDING USERS

From the Manage Users screen, you can add users individually or in bulk (via a formatted CSV file).

### Option 1: Add a user individually

**To add a user individually:**

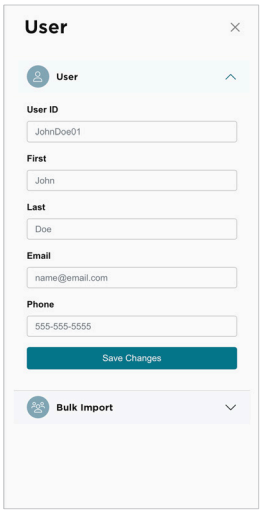
1. On the Manage Users screen, click the **Create User** button in the upper right corner.

   A User pane will open on the right side of the Portal.

2. In the the User pane:

   i. Enter the user's information (user ID, first name, last name, email address and phone number) in the appropriate fields. Note that only the user ID is required. For the sake of simplicity, you may want the user ID to mirror the username from the person's email address.

   ii. When finished, click the **Save Changes** button.




   After saving the user, a success message will display.

## Option 2: Add users in bulk

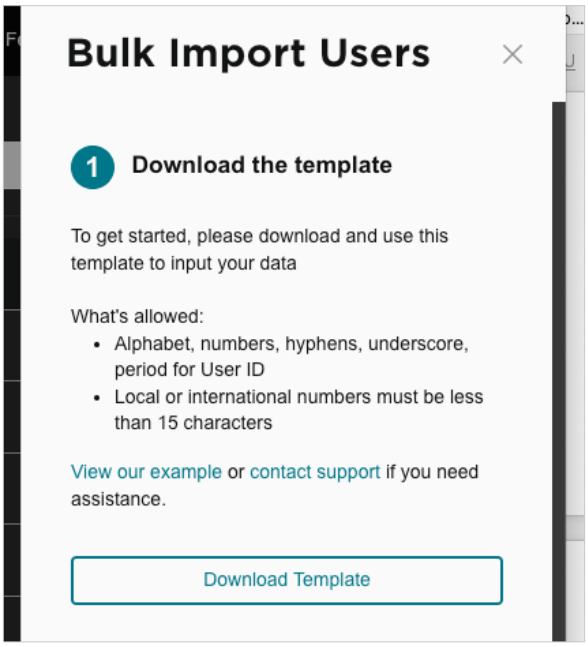
You can add up to 1,000 users to the Portal at a time using the bulk user upload feature. This method requires a precisely formatted CSV file that lists all of the users to be added.

**To add users in bulk:**

1. On the Manage Users screen, click the **Import Users** button in the upper right corner.

   A Bulk Import Users pane will open.

2. If you don't already have a CSV template for bulk user uploads, click the **Download Template** button in the Bulk Import Users pane and then save the file to a desired location.




   You may want to create a copy of the template for your bulk user upload so that you have the original for future use.

3. In a spreadsheet program (such as Microsoft Excel):

   i. Open the new CSV file.

   ii. Add each user to be added to a new row, making sure to include the pertinent information in the appropriate format under each column. The formatting of this file must be as follows:

      - The column names and order cannot be changed
      - User ID is the only required field
      - For the user ID, acceptable characters include letters, numbers, hyphens, underscores and periods
      - The user ID must be a unique identifier across the organization
      - The phone number must be numbers only (i.e., without spaces or hyphens)

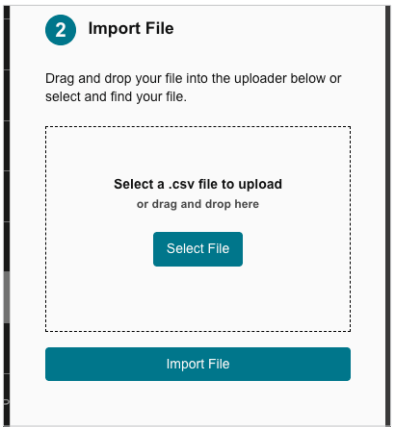
   iii. When finished, save the file.

| | A | B | C | D | E | F |
|---|---|---|---|---|---|---|
| 1 | User ID | First Name | Last Name | Email | Phone | |
| 2 | john.doe | John | Doe | john.doe@example.com | 4805550001 | |
| 3 | jane.doe | Jane | Doe | jane.doe@example.com | 4805550002 | |

4. Back in the Portal:

   iv. Select the newly created CSV file, either by clicking the **Select File** area and selecting from a file browser or by dragging the file from your computer and dropping into the area.

   v. Click the **Import File** button.



After starting the bulk user upload, a success message will display.

5. Verify that the bulk user upload was successful.

   i. Navigate to the Logs screen.

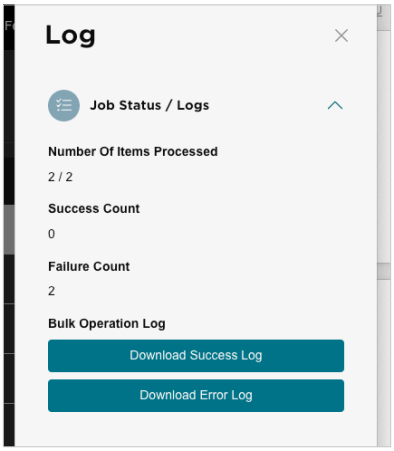
On the Logs screen, a new listing for the bulk user upload will appear. Under the **Status** column, the status will be displayed as “In Queue” before the upload starts, followed by a progress bar during the upload and finally “Completed” when the upload has finished.

   ii. When the bulk user upload has finished, click the listing.

A Log pane will open.

   iii. In the Log pane, verify that all users were successfully uploaded.

   If any of the users failed to upload, click the **Download Error Log** button to download a CSV file with specifics.

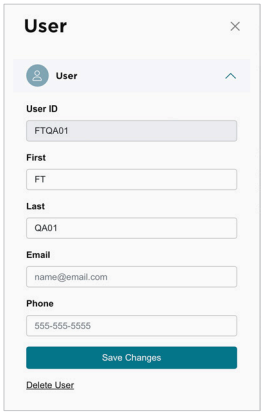


## EDIT A USER'S INFORMATION

You can edit a user's first name, last name, email address and phone number. Their user ID cannot be changed.

**To edit a user's information:**

1. In the user's detail pane:
   i. Edit any of the available fields.
   ii. When finished, click the **Save Changes** button.



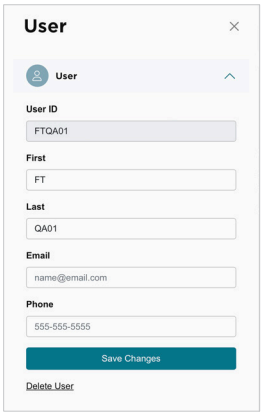

After saving, a success message will display.

## DELETE A USER

You can delete a user if they're no longer a SafeCase user or a member of your organization. When deleted, a user's SafeCase will be unassigned.

**To delete a user:**

1. In the user's detail pane, click the **Delete User** link.




After deleting the user, a success message will display.

# Managing SafeCases

SafeCase is Privoro's security device for mobile devices. SafeCases are added to the Portal by a Privoro administrator upon fulfillment of an order and will remain active in the Portal throughout the license period.

## VIEW SAFECASE INFORMATION

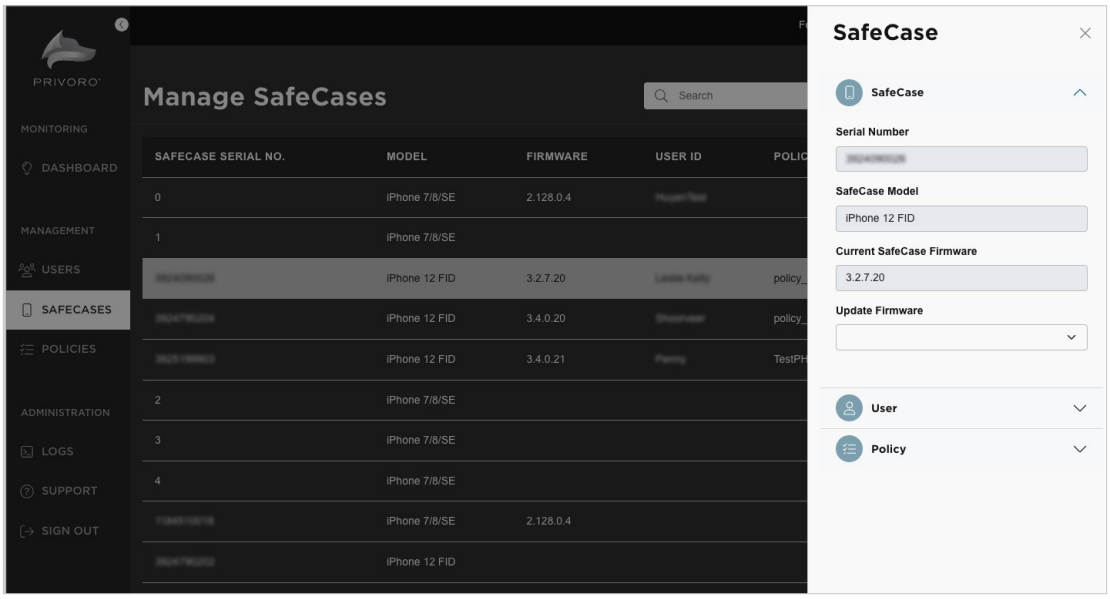
The Manage SafeCases screen lists all of the SafeCases under your supervision.

Within the listing for a single SafeCase, you can see the device's serial number, model, firmware version, assigned user (user ID), assigned policy and time of last SafeCase update.

| SAFECASE SERIAL NO. | MODEL | FIRMWARE | USER ID | POLICY | LAST UPDATED (UTC) |
|---|---|---|---|---|---|
| 3924790201 | iPhone 12 | 3.4.0.20 | huyenlefong | | Dec 29, 2022 19:07:58 |

To view additional information about a SafeCase, click the device's listing.

The SafeCase's detail pane will open.




Additional information includes the following:

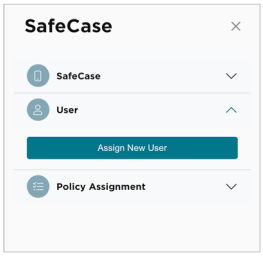
| Section | Additional information |
|---|---|
| User | First name, last name, email address, phone number |
| Policy | Policy rules |

## ASSIGN A USER TO A SAFECASE

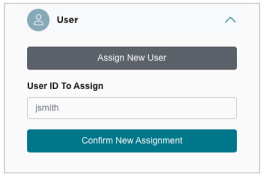
Before assigning a user to a SafeCase, the SafeCase must be added to the Portal by Privoro.

**To assign a SafeCase to a user:**

1. In the SafeCase's detail pane:
   i. Click the **User** dropdown menu to expand that section.
   ii. Click the **Assign New User** button.




   iii. Enter the user's user ID in the **User ID To Assign** field.
   iv. Click the **Confirm New Assignment** button.

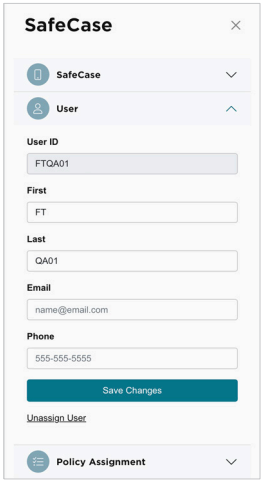



After assigning the SafeCase to the user, a success message will display.

## UNASSIGN A USER FROM A SAFECASE

**To unassign a SafeCase from a user:**

1. In the SafeCase's detail pane:
   i. Click the **User** dropdown to expand that section.
   ii. Click the **Unassign User** link.



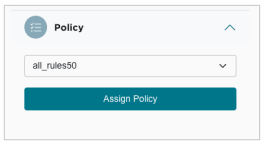

After unassigning the SafeCase from the user, a success message will display.

## ASSIGN A POLICY TO A USER-SAFECASE PAIR

Before assigning a policy to a user-SafeCase pair, the policy must be added to the Portal (see Section 7: Managing policies).

**To assign a policy to a user-SafeCase pair:**

1. In the SafeCase's detail pane:
   i. Click the **Policy** dropdown to expand that section.
   ii. Select the policy to assign from the **Select Policy** dropdown menu.
   iii. Click the **Assign Policy** button.

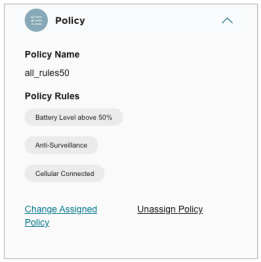



After assigning the policy to the user-SafeCase pair, a success message will display.

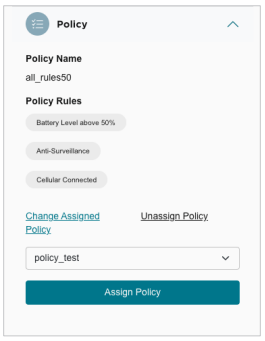
## CHANGE A USER-SAFECASE PAIR'S ASSIGNED POLICY

**To change a user-SafeCase pair's assigned policy:**

1. In the SafeCase's detail pane:
   i. Click the **Policy** dropdown to expand that section.
   ii. Click the **Change Assigned Policy** link.



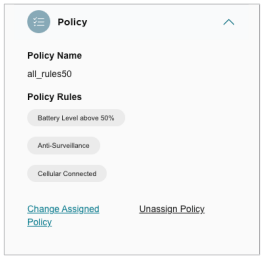

   iii. Select the policy to assign from the **Select policy** dropdown menu.
   iv. Click the **Assign Policy** button.




After changing the user-SafeCase pair's assigned policy, a success message will display.

**To unassign a policy from a user-SafeCase pair:**

1. In the SafeCase's detail pane:
   i. Click the **Policy** dropdown to expand that section.
   ii. Click the **Unassign Policy** link.




After unassigning the policy from the user-SafeCase pair, a success message will display.

## PUSHING FIRMWARE UPDATES

Privoro periodically releases new firmware for each SafeCase model. For security and stability purposes, it is important to keep SafeCase updated with the latest firmware.

After pushing a firmware update to a SafeCase, the user will receive a push notification via their Privoro app notifying them that an update is about to occur.

From the Manage SafeCases screen, you can push firmware updates to a single SafeCase or to all devices.

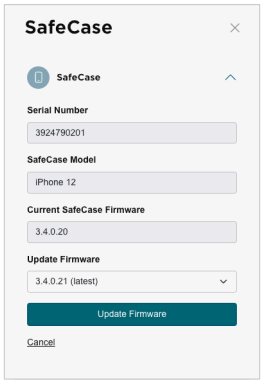
## Option 1: Push a firmware update to a single SafeCase

**To push a firmware update to a single SafeCase:**

1. In the SafeCase's detail pane:

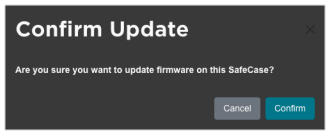
   i. Select the desired firmware version from the **Update Firmware** dropdown menu. The most recent version will be marked "latest."

   ii. Click the **Update Firmware** button.

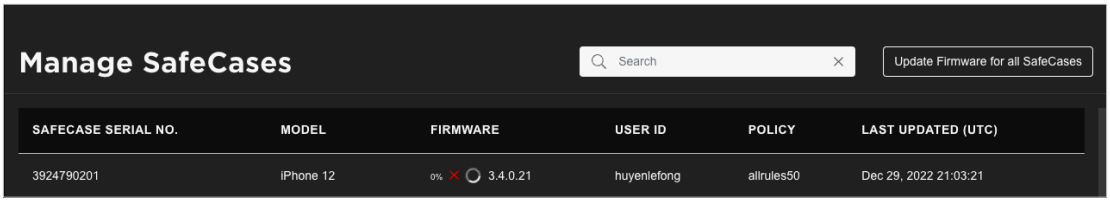



   A verification window will open.

2. In the verification window, click the **Confirm** button.



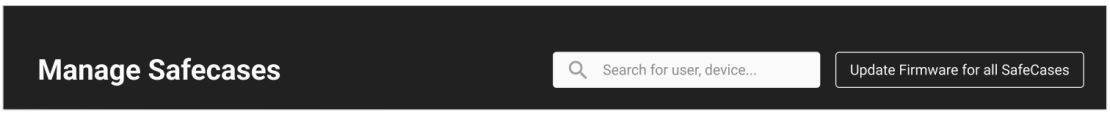

   The progress of the update will be displayed under the **Firmware** column for the SafeCase. Once the update is complete, the column will display the new firmware version.



## Option 2: Push a firmware update to all SafeCases

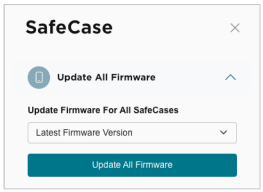
Only the latest firmware version can be pushed to all SafeCases.
**To push a firmware update to all SafeCases:**

1. On the Manage SafeCases screen, click the **Update Firmware for all SafeCases** button in the upper right corner.




   A SafeCase pane will open on the right side of the Portal.

2. In the SafeCase pane, click the **Update All Firmware** button.



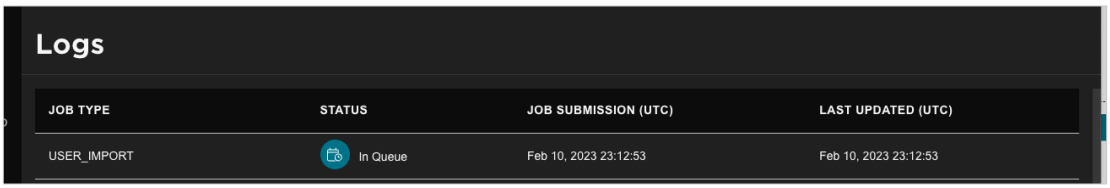

   After starting the bulk firmware update, a success message will display.

3. Verify that the bulk firmware update was successful.

   i. Navigate to the Logs screen.

      On the Logs screen, a new listing for the bulk firmware update will appear. Under the **Status** column, the status will be displayed as "In Queue" before the update starts, followed by a progress bar during the update and finally "Completed" when the update has finished.

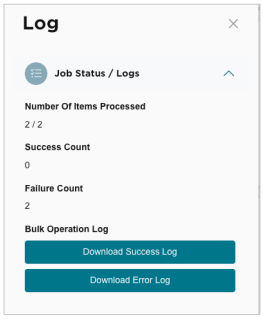
   ii. When the bulk firmware update has finished, click the listing.




A Log pane will open.

   iii. In the Log pane, verify that all SafeCases were successfully updated.

      If any of the SafeCases failed to update, click the **Download Error Log** button to download a CSV file with specifics.



# Managing policies

A policy is a rule or set of rules governing SafeCase usage. When a policy is violated, the policy violation will be displayed on the Monitoring Dashboard.

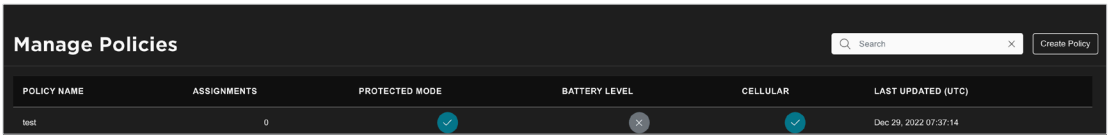
Examples of rules include the following:

- SafeCase must remain in protected mode (i.e., phone cameras and microphones are disabled).
- The phone's cellular radio must be turned off.
- SafeCase battery level must remain above a specified threshold (10-50%).

## VIEW POLICY INFORMATION

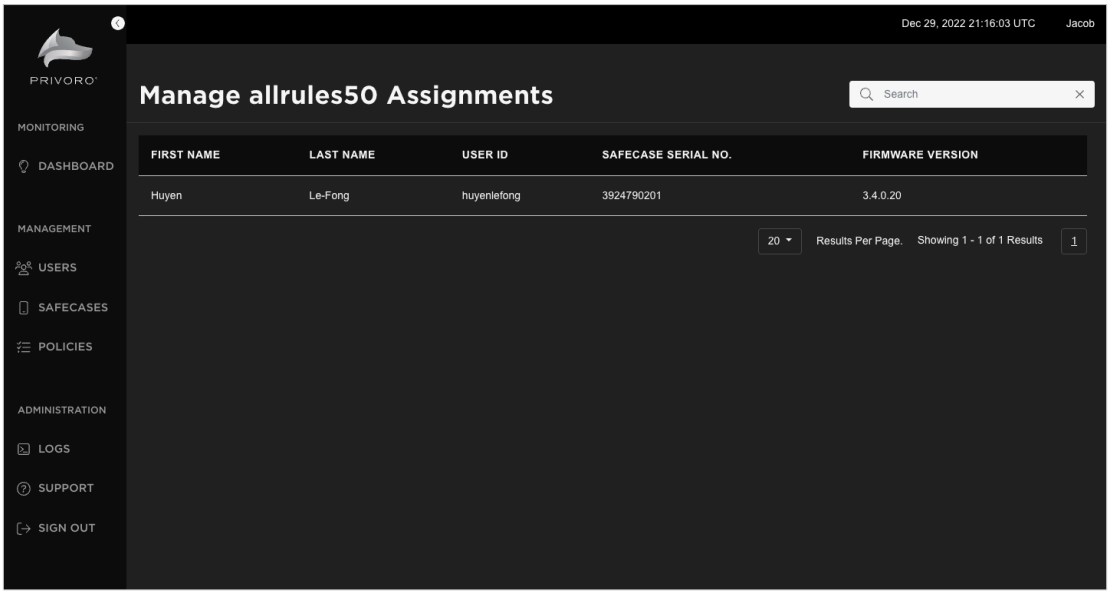
The Manage Policies screen lists all of the created policies

Within the listing for a single policy, you can see the policy's name, number of user-SafeCase pairs assigned to the policy, the policy's rules and the time of last policy update.




To view the user-SafeCase pairs to which the policy has been assigned, click the number under the Assignments column within the policy's listing.

An **Assignments** page listing the user-SafeCase pairs assigned to the policy will open.



## CREATE A POLICY

**To create a policy:**

1. In the Manage Policies screen, click the **Create Policy** button in the upper right corner.

   A Policy pane will open on the right side of the Portal.

2. In the Policy pane:

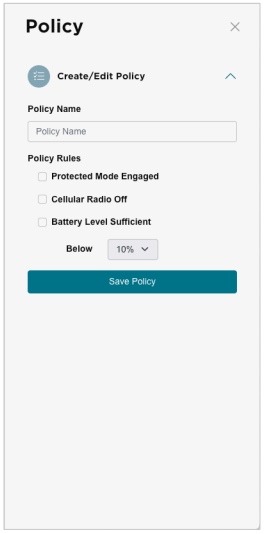
   i. Enter a name summarizing the policy in the **Policy Name** field.

   ii. Check the box for each applicable policy rule: **Protected Mode Engaged** if SafeCase protected mode is required, **Cellular Radio Off** if the phone's cellular radio must be turned off, and **Battery Level Sufficient** if battery level must remain above a specific threshold.

   - If Battery Level Sufficient is selected, select the percentage (10, 20, 30, 40 or 50) from the **Below** dropdown menu.

   iii. When finished, click the **Save Policy** button.

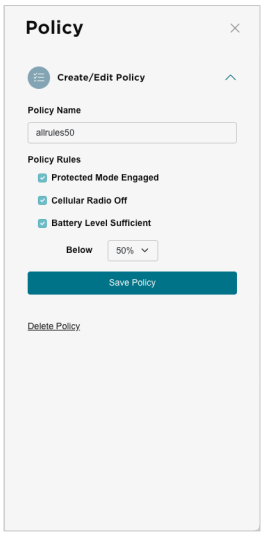
   After saving the policy, a success message will display.



## EDIT A POLICY

**To edit a policy:**

1. In the policy's detail pane:
   i. Edit the policy's name and/or rules.
   ii. When finished, click the **Save Policy** button.



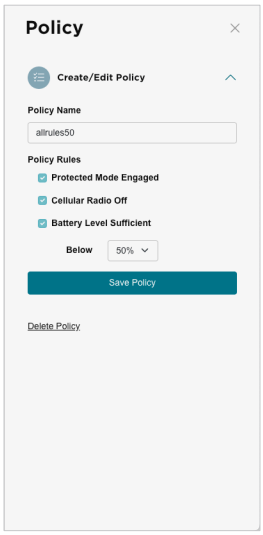

After saving the policy, a success message will display.

## DELETE A POLICY

Before deleting a policy, ensure that all user-SafeCase pairs assigned to the policy have been unassigned.

**To delete a policy:**

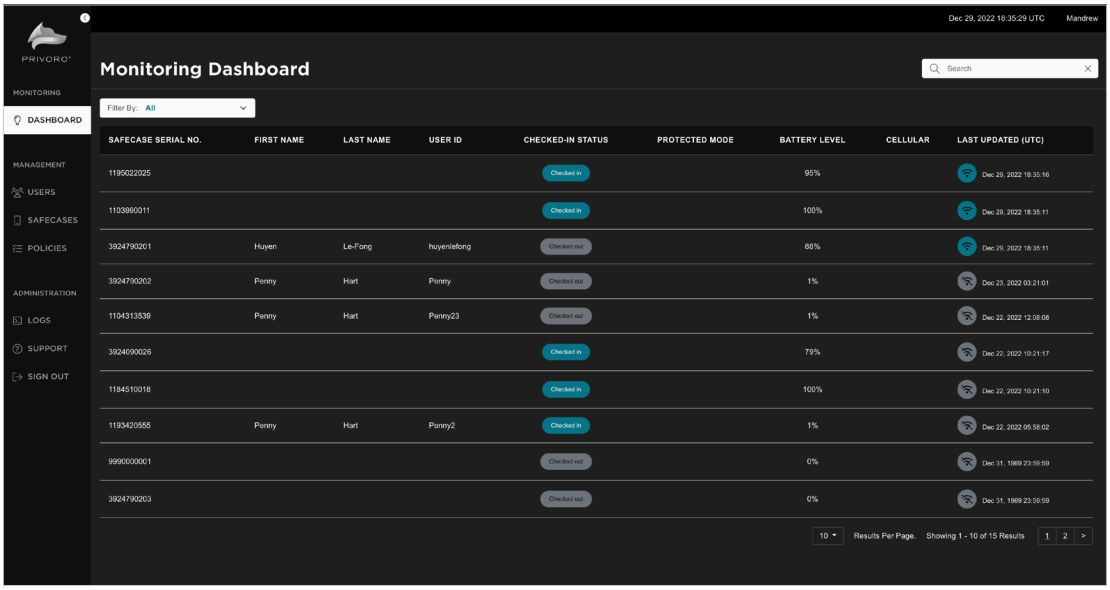
1. In the policy's detail pane, click the **Delete Policy** link.




After deleting the policy, a success message will display.

## WORKING WITH POLICY ALERTS

The Monitoring Dashboard lists recent alerts of policy violations (and other key SafeCase events), presented chronologically.




Policy violations may also be included in summary data provided to your organization's security information and event management (SIEM) system.

Depending on your organization's procedures, you may choose to follow up on an alert by researching the event within the Portal or SIEM system, reaching out to your security team or contacting the user in question.

# Submitting a support ticket to Privoro

If you or a member of your team have an issue using the Privoro Portal, SafeCase or Privoro app or encounter a bug, you can submit a support ticket to Privoro.

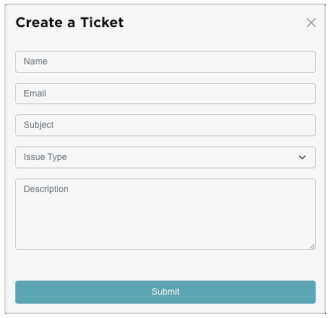
**To submit a support ticket to Privoro:**

1. On the Support & Help screen, click the **Create a Support Ticket** button in the upper right corner.

   A Create a Ticket window will open.

2. In the Create a Ticket window:

   i. Enter your name and email address in the pertinent fields.
   ii. Enter a brief summary of your issue in the **Subject** field.
   iii. Select the pertinent system (SafeCase, Privoro app, or Portal) or category from the **Issue Type** dropdown menu.
   iv. Enter a detailed description of the issue in the **Description** field. Include step-by-step directions for recreating the issue, if applicable. Also include as many specifics as possible – your browser version if a Portal issue, the serial number if a SafeCase issue or the app version if an app issue.
   v. When finished, click the **Submit** button.




   After submitting the ticket, a success message will display.

   You will receive an email confirmation with your ticket number. A Privoro support member will work on your ticket and get back to you with any updates.

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