

VERICORD MTR VALIDATION

User Manual

Upload, validate, review, sign off, and manage mill test reports in the Vericord Portal, and administer billing and users

Release	Production release, effective November 2, 2026
Document Revision	Revised 10/16/2026
Applies To	MTR Validation, Billing Center, and Settings at iwb.revcard.com
Platform / Device	Current web browser; MTRs as PDF up to 10 MB
Audience	Organization Admins, Users, and Viewers
Purpose	Step-by-step use of every customer-facing feature in the production release

Contents

1. INTRODUCTION	1
1.1 What Is Validated	1
1.2 Roles	1
1.3 Requirements	1
2. GETTING STARTED	2
2.1 Sign In	2
2.2 Navigation	2
3. VALIDATING AN MTR	3
3.1 Step 1: Upload the Document	3
3.2 Step 2: Code Select	3
3.3 Step 3: Heat / Lot No	3
3.4 Step 4: Status Summary	4
3.5 Step 5: MTR Overview	4
3.6 The Exception Report	4
3.7 Resuming a Pending Scan	4
4. WORKING WITH SAVED RECORDS	5
4.1 The Documents List	5
4.2 Record Actions	5
4.3 Compliance Drill-Down	5
4.4 The Final Validation Report	5
5. ELECTRONIC SIGN-OFFS	6
5.1 Request Signatures	6
5.2 Sign or Decline	6
6. PROJECT FOLDERS AND SHARING	7
6.1 Create a Folder	7
6.2 Add Records to a Folder	7
6.3 Share a Folder	7
7. REPORTS DASHBOARD	8
8. BILLING CENTER (ADMINS)	9
8.1 How Billing Works	9
8.2 Buy Credits	9
8.3 Auto-Recharge	9
8.4 Ledger and Invoices	9
9. SETTINGS (ADMINS)	10
9.1 Organization Profile and Security	10
9.2 Invite Users	10
9.3 Manage Users and Groups	10
9.4 Email Settings	10
10. GETTING SUPPORT	11
10.1 Report an Issue	11
10.2 Support Hours and Response Times	11
10.3 Refunds and Disputed Results	11
10.4 Contact	11

1. INTRODUCTION

MTR Validation checks mill test reports (MTRs) against code requirements. You upload an MTR as a PDF. Commercial AI models read the reported values, and the Vericord Validation Engine compares them against the code requirements using deterministic rules built by subject matter experts from the code books. The model reads; it never rules.

For every evaluated property, the report shows the value found on the MTR, the value the code requires, the governing code section, the result, and the reason for any non-compliance. One failing value fails the MTR.

WARNING: MTR Validation is a decision-support tool. You must independently verify every result against the source MTR, the applicable code, and your contract requirements before any acceptance, compliance, or safety decision. Do not rely on it alone for safety-critical decisions.

1.1 What Is Validated

MTR Validation covers base-metal MTRs against specifications in ASME Boiler and Pressure Vessel Code Section II, Parts A and B, and widely used ASTM specifications that Vericord has encoded. Product forms are sheet, plate, strip, bar, tube, and pipe. Three categories of requirements are validated:

- Chemical composition
- Mechanical properties
- Heat treatment

The following are not validated in this release: filler metals, supplementary requirements, and any requirement not listed in Vericord's published coverage information. In-scope requirements the engine does not validate deterministically are listed in the Exception Report for manual verification (see 3.6).

1.2 Roles

Role	What the role can do
Organization Admin	Everything a User can do, plus Billing Center, Settings, user invitations, roles, groups, and organization security policy
User	Upload and validate MTRs, correct extracted values, save records, manage Project Folders, and send sign-off requests
Viewer	View only the Project Folders shared with them. Viewers cannot scan or validate MTRs. Each Viewer with folder access is billed \$12 per month to the organization wallet.

1.3 Requirements

- A current web browser and access to <https://iwb.revcard.com>
- MTRs in PDF format, up to 10 MB each
- Two-factor authentication, if your Admin requires it
- Your own licensed copies of the codes and specifications you rely on

2. GETTING STARTED

2.1 Sign In

Step 1: Open the Vericord Portal

1. Go to <https://iwb.revcord.com>.
2. Enter your username and password.
3. If prompted, review and accept the Vericord Terms and Conditions.
4. If your organization requires two-factor authentication and you have not enrolled, follow the enrollment steps shown at sign-in.

NOTE: New users receive an email invitation from an Admin. You set your own username and password when you accept the invitation. Invitations expire after 7 days.

2.2 Navigation

The sidebar contains the following areas. What you see depends on your role.

Area	Contents
MTR Validation › Documents	The list of all MTR records and the Add New Document wizard
MTR Validation › Sign-Offs	Signature requests you need to sign or have sent
MTR Validation › Folders	Project Folders and sharing
MTR Validation › Reports	The MTR Summary analytics dashboard
Support Tickets	Issues you have reported and their status
Billing Center	Wallet, credits, Auto-Recharge, ledger, and invoices (Admins)
Settings	Organization profile, users and groups, and email settings (Admins)

3. VALIDATING AN MTR

Validation runs in a five-step wizard: Document, Code Select, Heat / Lot No, Status Summary, and MTR Overview.

CAUTION: Running a scan is billable. A successful scan costs \$25 for the first three pages plus \$2 for each additional page. Failed scans are not charged. Check that you have the right file before you run the scan.

3.1 Step 1: Upload the Document

1. Go to **MTR Validation** › **Documents** and click **+ Add New Document**.
2. Drag the PDF into the **Upload Document** zone, or click to select it. Click the **X** to remove a file.
3. Enter a **Name** (required, up to 255 characters). The name is not filled in from the file name.
4. Leave **MTR Type** set to **Base Metals**.
5. Enter a **Description** if you want one (optional, up to 255 characters).
6. Use the viewer on the left to check the document: **Prev** and **Next** to change pages, **-**, **Fit**, and **+** to zoom, and **Rotate 90°** for sideways pages.
7. Click **Run Vericord MTR Validation**. The button is available once a file is uploaded and a name is entered.

Processing takes about 30 seconds to 3 minutes, depending on the size of the MTR.

NOTE: To leave the wizard, click the back arrow. There is no discard prompt. Folders are assigned after you save, not in this step.

3.2 Step 2: Code Select

The code sections detected on the MTR are listed, all selected. Deselect any section you do not want validated, then continue. If only one code section is detected, this step is skipped.

3.3 Step 3: Heat / Lot No

The heats detected on the MTR are listed, all selected. Compare each heat number with the PDF, deselect any you do not want validated, then continue. If only one heat is detected, this step is skipped.

3.4 Step 4: Status Summary

This is where you review results. The original MTR appears on the left and a summary by heat and grade on the right. Non-compliant sections open automatically.

1. Read the summary matrix. Each row is an MTR section and each column is a selected code section. Every cell shows compliant or non-compliant.
2. Click any indicator to open the breakdown. Each property shows the value found on the MTR, the code-required value, and the result.
3. Compare every flagged or low-confidence value with the PDF.
4. To correct a value the system read incorrectly, edit it in place. The system re-validates that property against all relevant code sections for the heat and grade and updates the summary.
5. To have a Vericord engineer review a result you believe is wrong, click **Report Issue** and describe the problem.

NOTE: Every correction is logged with the previous value, the new value, the user, and the time. The log appears in the Audit Log of the final report.

3.5 Step 5: MTR Overview

1. Review the header information: Unique ID, grade, class, product form, dimensions, and heat numbers.
2. Review the validation data for each code section.
3. If non-compliances remain, the system warns you. Confirm to continue, or go back and review.
4. If an Exception Report appears, review it and verify each listed requirement manually (see 3.6).
5. Save the record.

3.6 The Exception Report

An Exception Report appears when the selected code sections contain requirements the engine does not validate deterministically. It lists those requirements for each code section.

WARNING: You must manually verify every item in the Exception Report against the MTR and the applicable code. These requirements were not validated by the system, and the record can be saved without them being checked.

Exceptions are not the same as non-compliances. A record can have non-compliant values and no exceptions. In that case, no Exception Report appears.

3.7 Resuming a Pending Scan

If a scan was run but never saved, an amber banner on the Documents list shows the file name, page count, time, and the charge already billed. Click **Resume** to finish the review and save. Resuming does not charge again.

4. WORKING WITH SAVED RECORDS

4.1 The Documents List

MTR Validation > Documents lists every MTR record. Each record has a Unique ID in the format **IWB-MTR-YYYYMMDD-NNNN**.

- **Filters:** Document Name, Alias, and a Certificate filter that searches any field or one of Heat No, Lot No, Grade, Code Section, ASME, or ASTM. Click **Search** to apply and **Reset Filter** to clear.
- **Columns:** click **More columns** to add Codebook · Edition, Class, Product Form, Dimensions, Country, and QA Approval.
- **Rows per page:** 10, 20, 50, or 100.

4.2 Record Actions

Action	What it does
Edit	Changes the Document Name and Alias / Description only. Results cannot be edited.
Sign Request	Sends the record for electronic signature (see Section 5)
View	Opens the Final Validation Report with the original MTR attached, in a new tab
Request Report	Appears when no report exists yet
Add to Project Folder	Adds the record to one or more folders
View Original	Opens the uploaded PDF alone
View Sign-Off	Lists the record's signature requests

NOTE: Saved records are locked and cannot be deleted from the list. To request deletion of a record, an Admin must send a written request to support@vericord.co.

4.3 Compliance Drill-Down

Hover over a record's **Compliance** badge to see the count of non-compliant fields. Click the badge to expand a read-only breakdown with totals, then one block per section, such as Chemical, Mechanical, and Heat Treatment. Failing sections open automatically. Each row shows KDP, Symbol, Input, Standard, Status, and, for failures, the Reason.

4.4 The Final Validation Report

The report contains, in order:

1. A banner with the Unique ID, scan date, and last-edited time.
2. MTR Overview tiles: codebook validated against, MTR code edition, grade, class, UNS, heat numbers, QA approval, product form, and dimensions.
3. For each code section and heat, Chemical Composition, Mechanical Properties (in dual units, such as PSI and MPa), and Heat Treatment, with Input, Standard, Reason, and Status. Non-compliant rows are shown in red.
4. Exception Report subsections, when exceptions exist.
5. The Change Log and the Audit Log of field-level corrections.
6. A Notes disclaimer and the original MTR pages.

5. ELECTRONIC SIGN-OFFS

5.1 Request Signatures

1. On a record, click **Sign Request**.
2. Review the **Title**, which defaults to "MTR sign-off: <name>", and add a **Description** if needed.
3. Check **Sign in order** (sequential) if signers must sign one after another.
4. Set **Expires in (days)**.
5. Add signers from your organization's users, or by external email with an optional name.
6. Send the request.

CAUTION: Before you add an external signer, confirm that the person has agreed to sign electronically. Your organization is responsible for that consent under the Terms and Conditions.

5.2 Sign or Decline

Go to **MTR Validation > Sign-Offs**. Tiles show requests you need to sign, requests you sent that are awaiting signature, and requests signed, rejected, or expired in the last 30 days.

1. Open the request and click **Sign** or **Decline**.
2. Choose **Click**, **Type**, or **Draw**, and add notes if needed.
3. Confirm that you agree to sign electronically, then sign.

Signing records your name, the time, and your IP address against the request. Each request keeps an audit trail and PDF history.

6. PROJECT FOLDERS AND SHARING

6.1 Create a Folder

1. Go to **MTR Validation** › **Folders** and click **New Folder**.
2. Enter a **Folder Name** (required) and an optional **Description**.

6.2 Add Records to a Folder

On the Documents list, click **Add to Project Folder** on a record, then click **+ Add** next to the folder. A record can belong to more than one folder.

6.3 Share a Folder

1. Open the folder and click **Share**, or click **Manage sharing** on the folder row.
2. On the **Add Users** tab, choose **View** or **Edit**, then search for and add users.
3. On the **Current Access** tab, change or revoke access.

Folders can be shared only with users in your organization. To share with someone outside it, an Admin must first invite them (see 9.2).

NOTE: Inviting an outside person as a Viewer adds a \$12 per month charge to the organization wallet once they have access to a folder.

7. REPORTS DASHBOARD

MTR Validation › Reports › MTR Summary shows activity for a selected date range: Total Documents, Reports Ready, Compliant, and Non-Compliant, with panels for Document Types, Compliance Breakdown, Report Status, Monthly Upload Trend, Top Failing Fields, Spec / Grade Matrix, and Product Form Coverage. Click a row to drill down.

8. BILLING CENTER (ADMINS)

8.1 How Billing Works

Your organization pays from a prepaid wallet. Credit never expires while your account is active.

Charge	Amount
Successful scan, first 3 pages	\$25.00
Each additional page	\$2.00
Viewer with access to at least one folder	\$12.00 per month
Failed scan	No charge

When the wallet cannot cover a scan, scans are blocked until credit is added. Viewer charges are still owed when the wallet is short; the shortfall is taken from the next purchase. Viewer access is never cut off for insufficient funds.

8.2 Buy Credits

1. Go to **Billing Center** › **Overview** and choose **Buy Credits**.
2. Pick \$25, \$100, \$500, or \$1,000, or enter an amount from \$5 to \$5,000.
3. Complete payment on the secure hosted payment page. Card details never reach Vericord.

The wallet is credited when payment clears.

8.3 Auto-Recharge

Auto-Recharge buys credit automatically when the balance falls to a threshold (default \$50.00). Set the recharge amount (\$100 to \$5,000), the card, and an optional monthly cap. No more than 5 recharges run in 24 hours.

1. Enable **Auto-Recharge** and set the threshold, amount, card, and cap.
2. Read and accept the authorization shown on screen.

Changing the threshold or cap does not need a new authorization. Changing the card does. Every authorization is kept in the Auto-Recharge Authorizations history. If a recharge fails, Admins see a banner and receive an email.

8.4 Ledger and Invoices

The **Usage & Credit Ledger** lists every deposit, scan charge, viewer charge, and refund or adjustment, with the balance after each. Filter by date and click **Export CSV** to download. **Invoices** lists receipts and monthly usage rollups, each with **Download PDF**.

9. SETTINGS (ADMINS)

9.1 Organization Profile and Security

Update your organization's name, email, phone, address, and locations. To require two-factor authentication for every member, enable the security policy. You must enroll in two-factor authentication yourself first. Members who have not enrolled are guided through it at their next sign-in.

9.2 Invite Users

1. Go to **Settings** › **Users & Groups** and click **Invite User**.
2. Enter **First Name**, **Last Name**, **Email**, and **Role**.
3. Send the invitation.

If you choose **Viewer**, the system warns you about the monthly charge. The invitee does not see it. Track invitations on the **Pending Invites** tab, where you can **Resend** or **Cancel**.

9.3 Manage Users and Groups

On the **All Users** tab, you can edit a user's name and role, disable or enable the account, reset the password, and reset two-factor authentication. Use **+ Create Group** and **Manage Members** to organize users into groups. A user can belong to any number of groups. New accounts join the default group, **General**.

9.4 Email Settings

To send notifications from your own mail server, enter your SMTP host, port, username, password, from email, and from name, set SSL/TLS, and click **Send Test**. If you do not configure this, Vericord's mail service is used.

10. GETTING SUPPORT

10.1 Report an Issue

Click **Report Issue** at any step of the validation wizard and describe the problem. A ticket is created with the details of your scan. Track it under **Support Tickets**.

10.2 Support Hours and Response Times

Priority	Examples	First response
Critical	The Vericord Portal is down, or no one in your organization can upload, validate, or open records	Within one business hour
Normal	A single failed scan, a disputed result, a billing question, or a refund request	Within one business day

Support hours are 8 a.m. to 5 p.m. Central Time on business days.

10.3 Refunds and Disputed Results

If a scan was charged but did not produce a usable result because of a system error, or you were charged incorrectly, report it through **Report Issue** within 30 days of the charge. Approved refunds are credited to your wallet. Admins cannot issue refunds. If you believe a result is wrong, report it the same way; a Vericord engineer reviews disputed results.

10.4 Contact

Support and legal notices: support@vericord.co. Put "Legal Notice" in the subject line for formal notices.

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