Use of the Genie Dashboard Platform

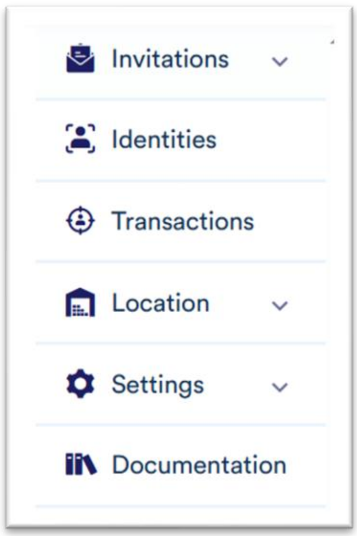
Contenido

1. General

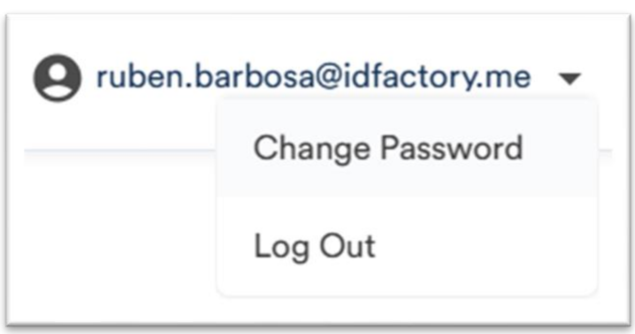
To access the Dashboard, you will need a username and password provided by the ADO support team. If you do not have a username yet, please request one at the following email address: support@idfactory.me.

The link to access the platform is https://dashboard.idfactory.me/login. If this is your first time logging into the system, it will prompt you to update your password. Please do so to gain access.

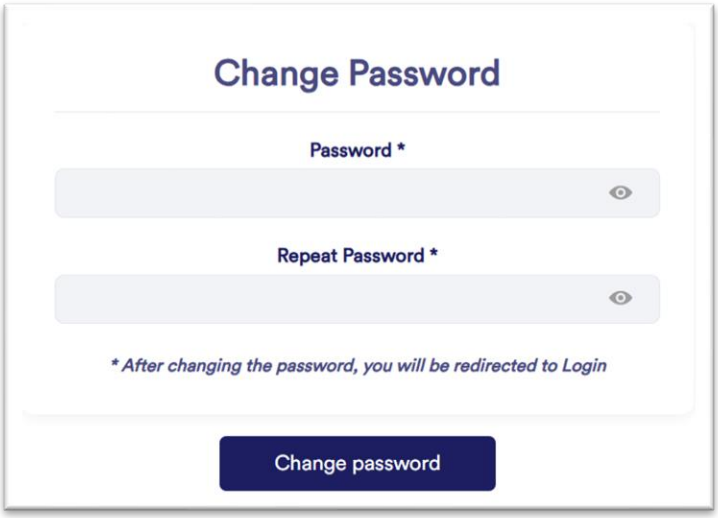
Once you have logged into the platform, you will see a navigation bar on the left side with the enabled options.



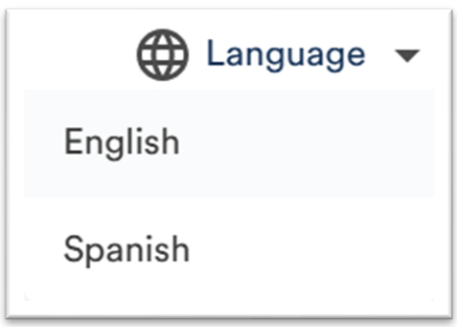
In the top right corner, you will find your username, where you have the option to update your password and log out.



When selecting the "Change Password" option, the system will allow you to change it by asking for your current password and the new password.



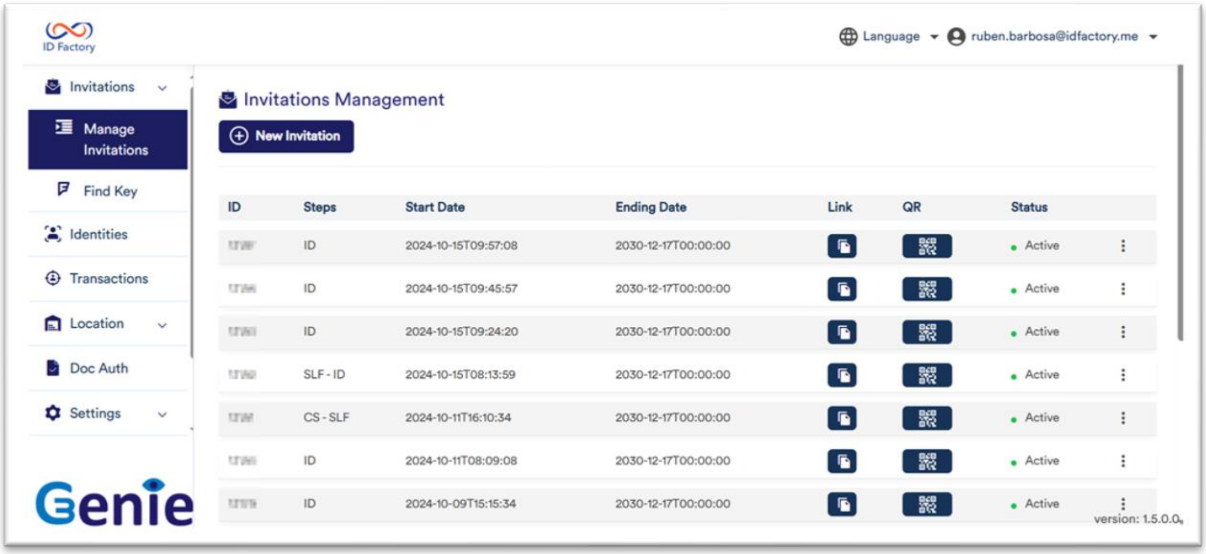
To the left of the username, you will find the option to change the language, with English and Spanish currently available.



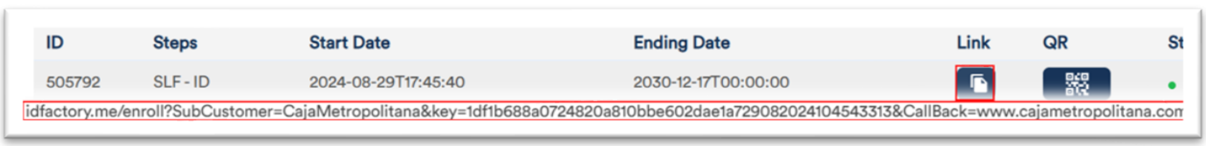
2. Invitations

In the “Invitations” section, under “Manage Invitations,” you will find a list of all the invitations created with some important information, such as: “ID,” “Steps,” “Start Date,” and “Ending Date.” The "ID" field refers to a unique and non-repeatable number that identifies each invitation. The "Steps" field refers to the steps and the order in which they were configured when the invitation was created. The abbreviations "CS" stand for Consent, "SLF" for Selfie, and "ID" for Document.

The "Start Date" and "Ending Date" columns refer to the period during which the invitation is valid. Outside of those dates, the invitation will not work.

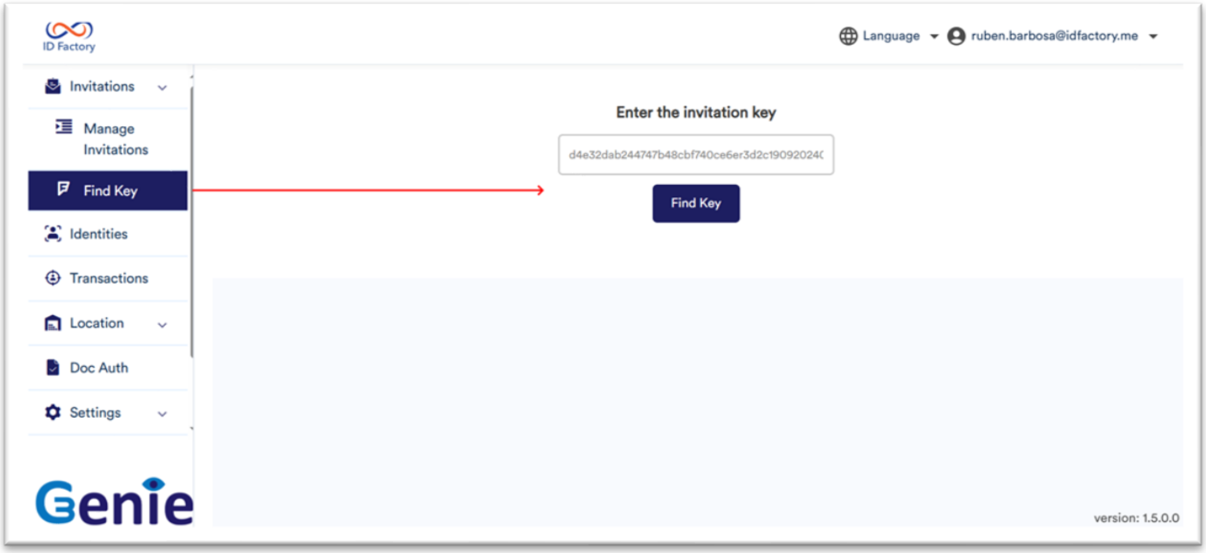


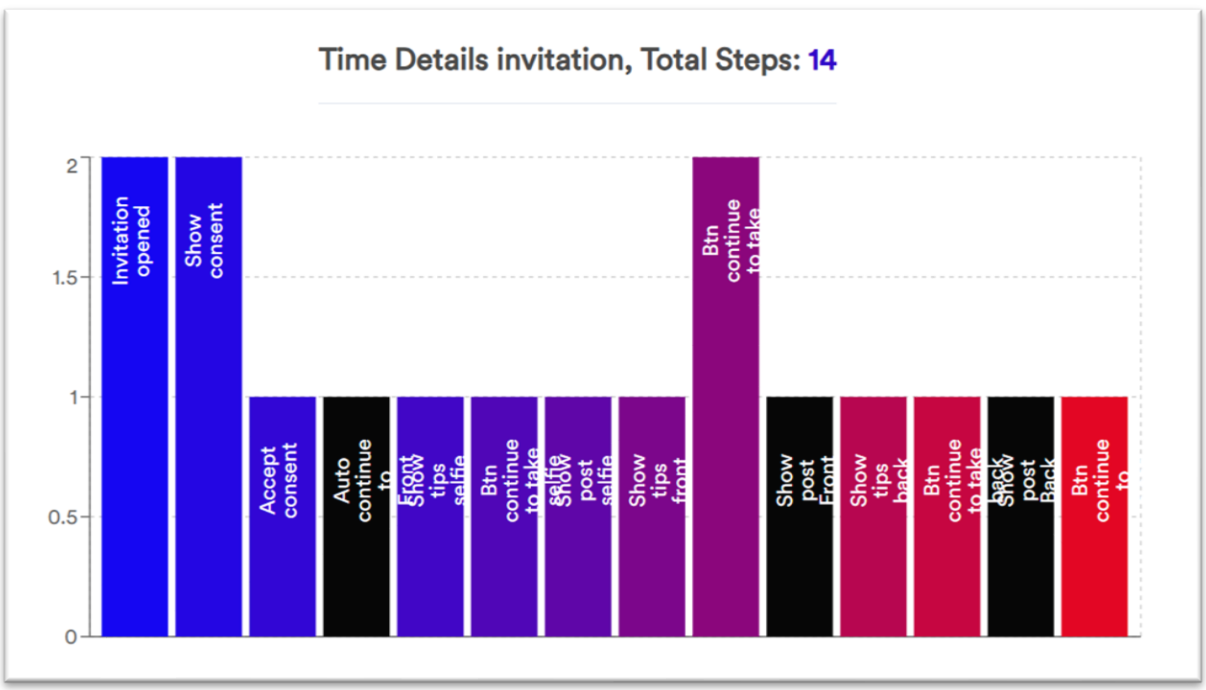
In the "Link" column, you will find a button. Clicking on it will copy the invitation URL, which can be pasted into a browser.



The "QR" column will have a button. Clicking it will open a QR code that you can scan with your phone's camera to open the invitation in the browser. Finally, in the "Status" column, you can see whether the invitation is active or inactive.

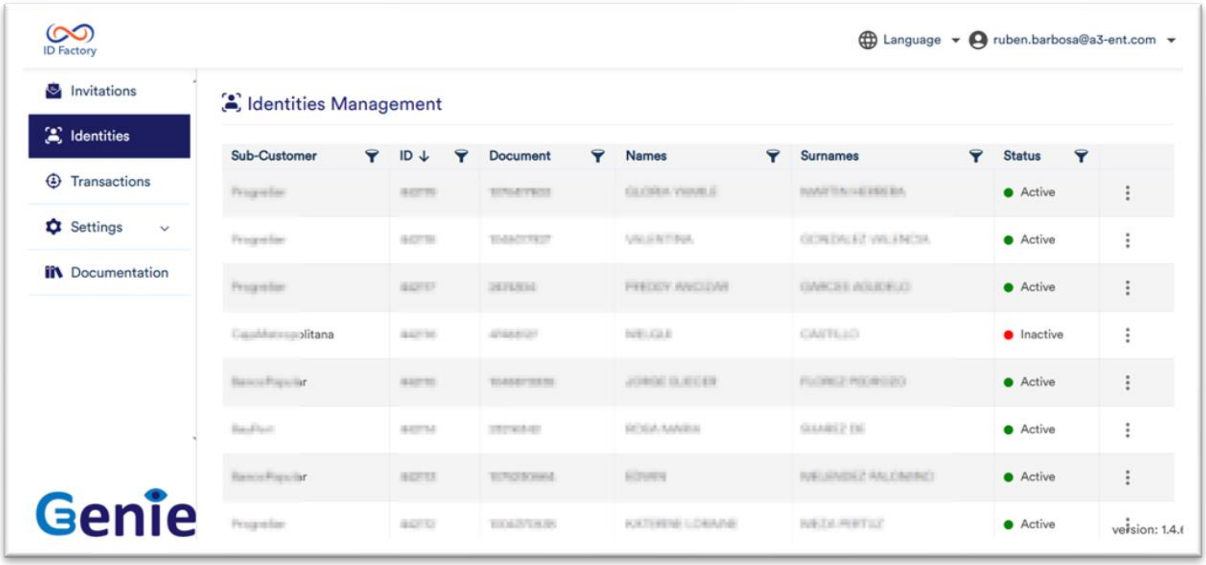
In the "Find Key" submenu, you can view the steps the user completed with a specific invitation. To see the steps, you need to paste the invitation key and click the "Find Key" button.



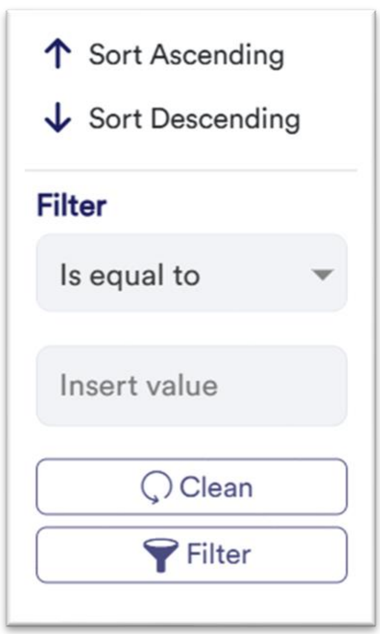


3. Identities

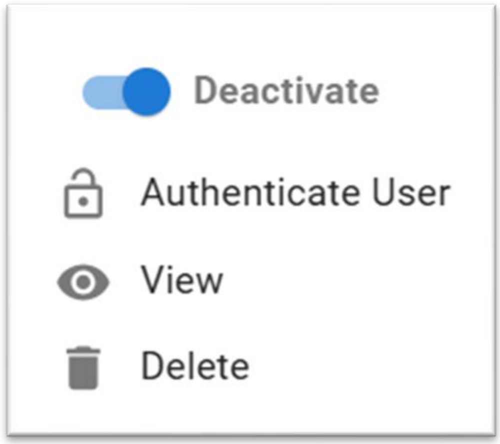
In the identities section, you will find a table with the clients enrolled in the system.



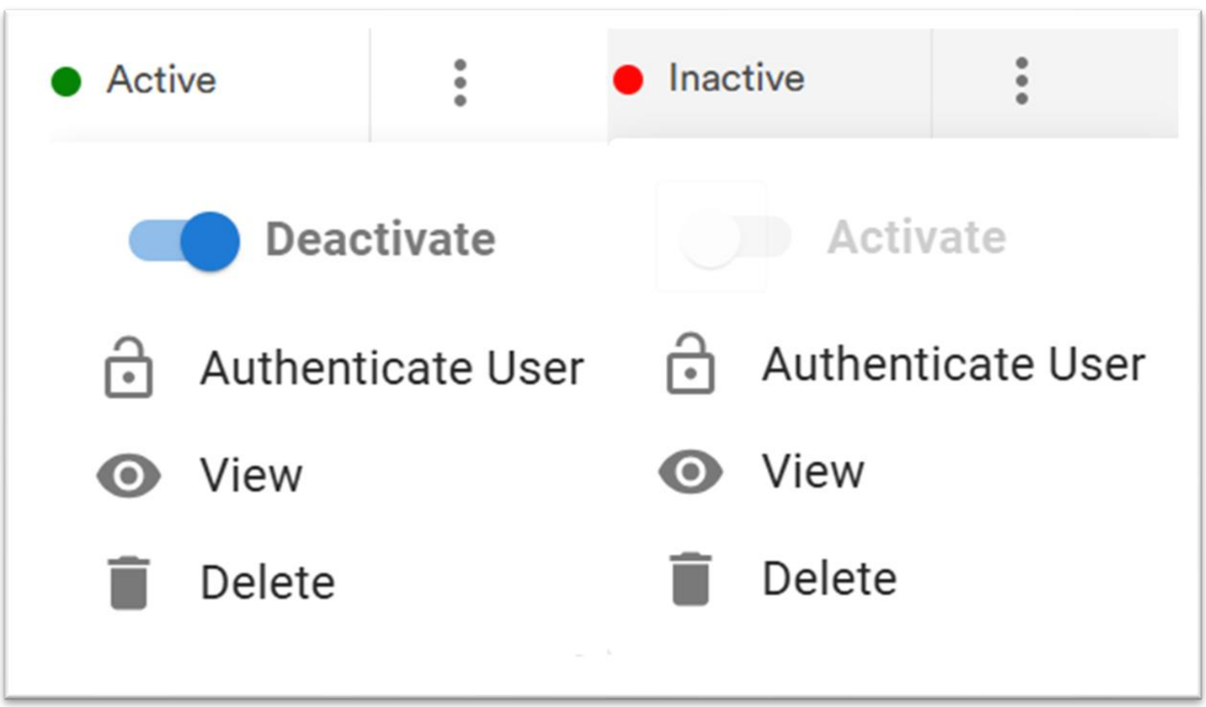
All the columns contain a filter that you can use to query information with more specific data or to organize the displayed information in ascending or descending order.



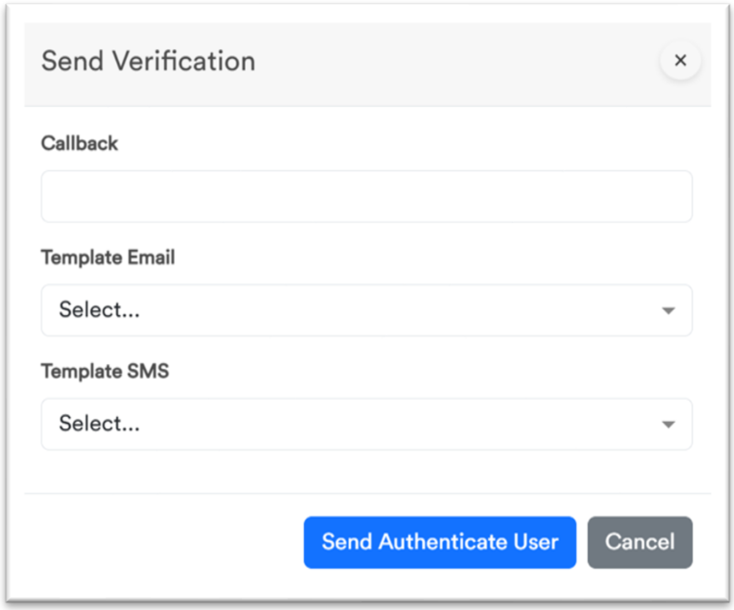
In the last column, you will see three dots for each row. Clicking on them will show you the available options.



The “Deactivate” option will inactivate the identity in the system. If the user is active, the option will appear as “Deactivate,” and if they are inactive, it will appear as “Activate.” The intermediate administrator role only allows for deactivating the identity:

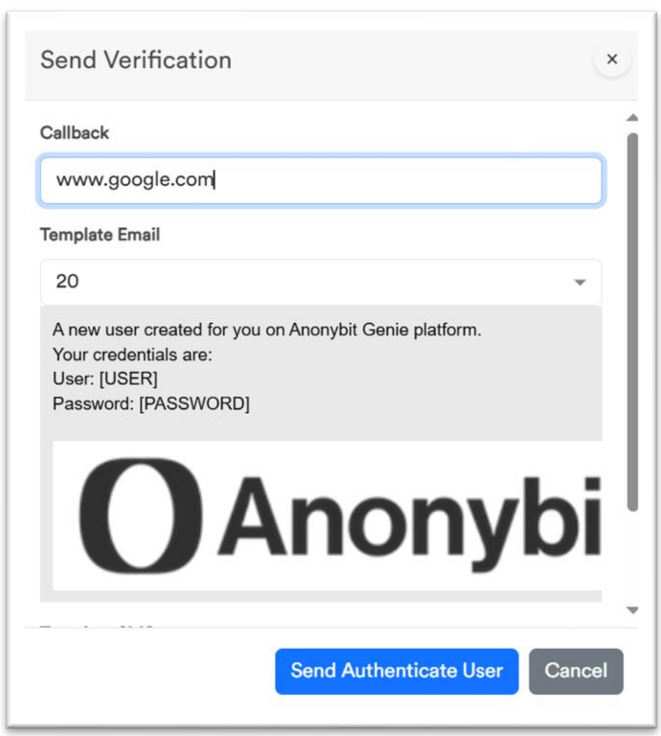


When you click on the “Authenticate User” option, a window will open showing you the following options:

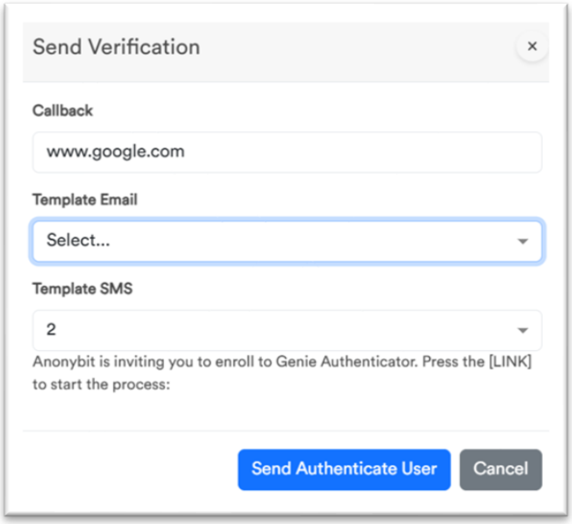


In the "Callback" section, you can enter the page to which you want the invitation to be redirected once the transaction has been completed.

In the "Template Email" section, you can select one of the created templates. This template can only be created by a system administrator, so please contact the support email to request its creation. When you select the template, a preview will be enabled at the bottom, allowing you to see which template has been selected.

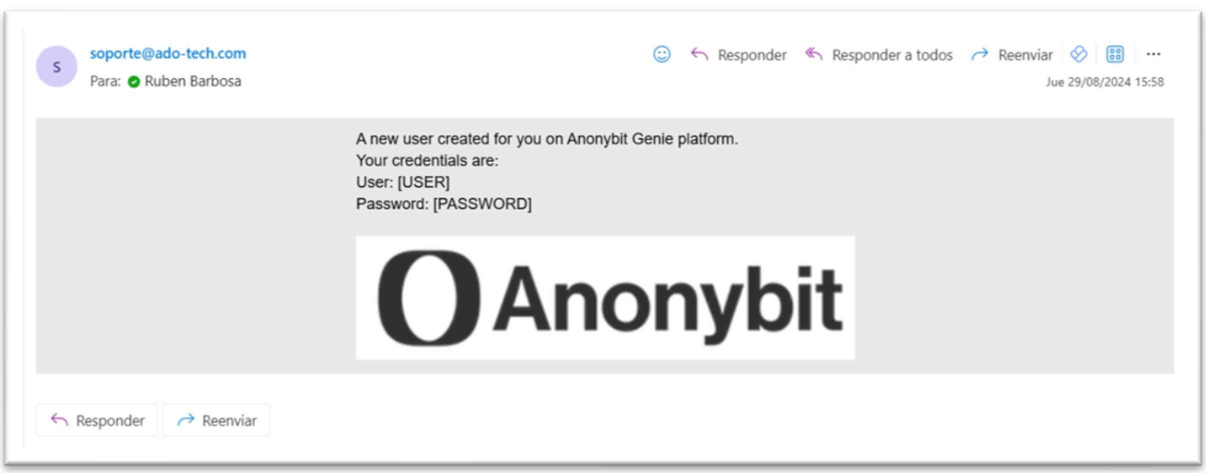


In the “Template SMS” section, you can select a text message template, and when selected, a preview will be enabled at the bottom, allowing you to see which template has been selected.

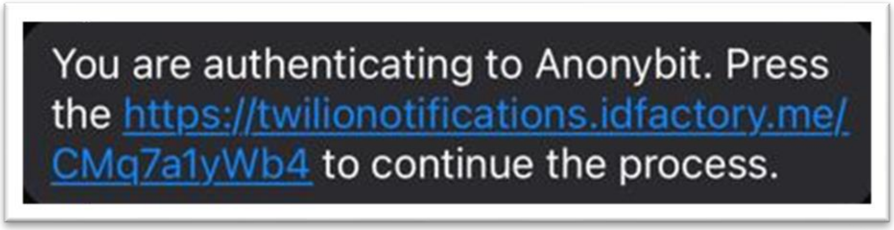


Once you select the Email and/or SMS template and click on “Send Authenticate User,” an email and/or text message will be sent to the email address and cell number, provided that they were configured when creating the enrollment invitation.

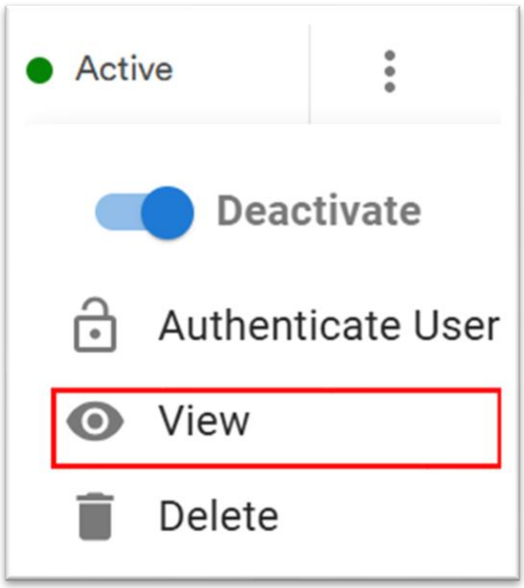
Example of an email after clicking on “Authenticate User”:



Example of SMS sent to the cell number:



The third available option is "View".



Clicking on the option will open a new window with the information of the selected identity. You will be able to see images of the document used for enrollment in the system and the selfie (the selfie will only be visible if the Selfie service was selected when creating the invitation).

Additionally, you will see a table at the bottom containing the following information, listing how many transactions are performed by the person.

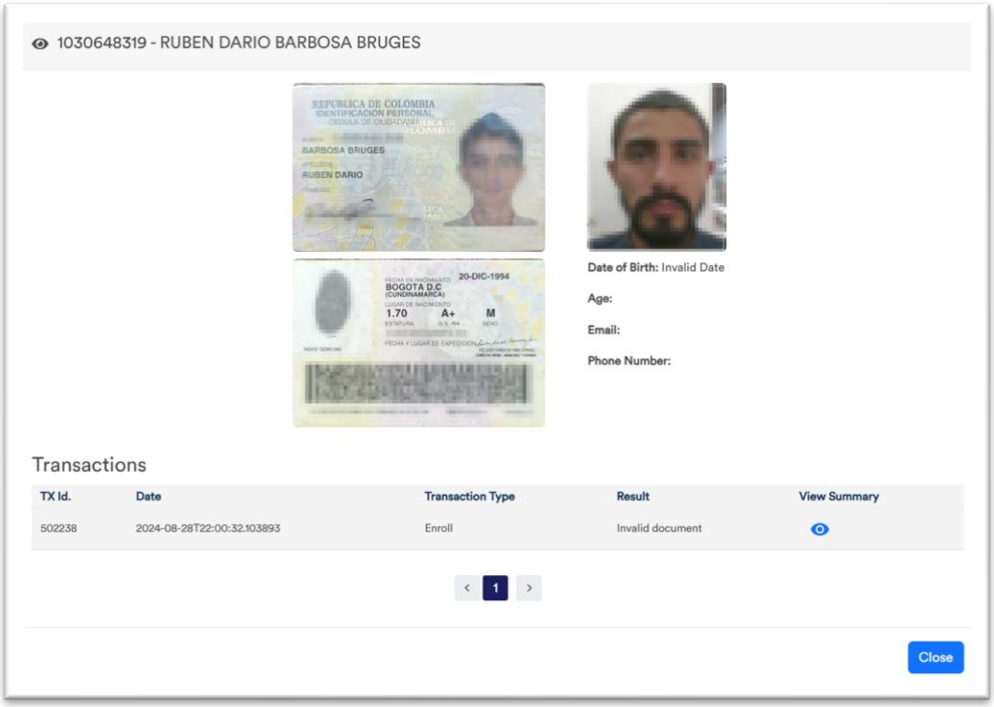
TX ID: Unique and non-repeatable identifier of the transaction.

Date: Date and time when the transaction was executed.

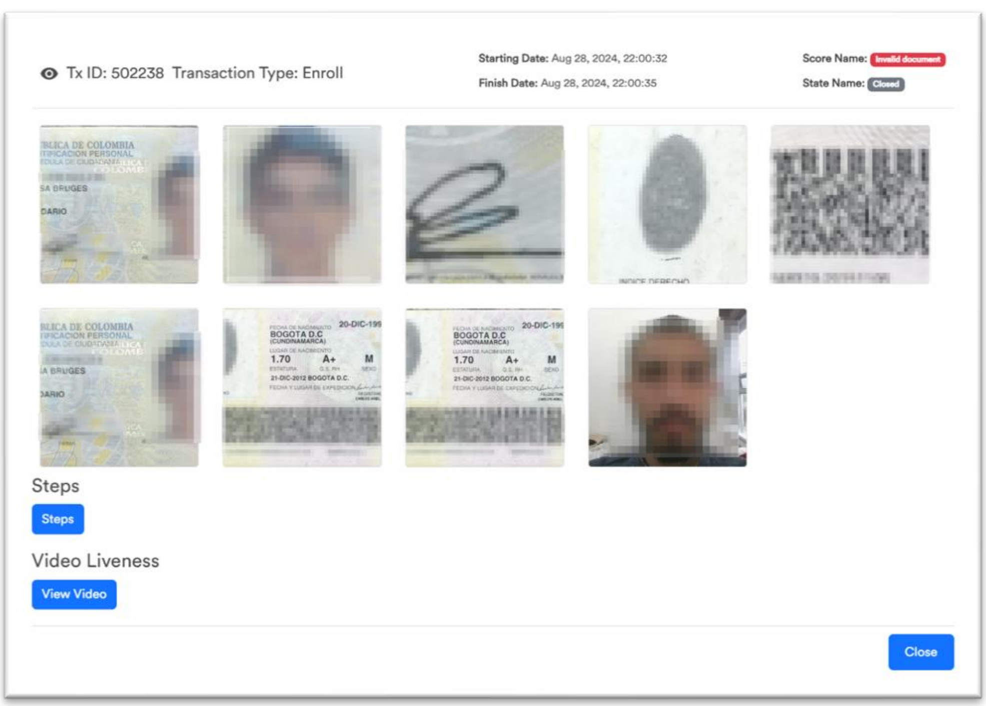
Transaction Type: Can be either Enroll or Verify.

Result: Result of the transaction.

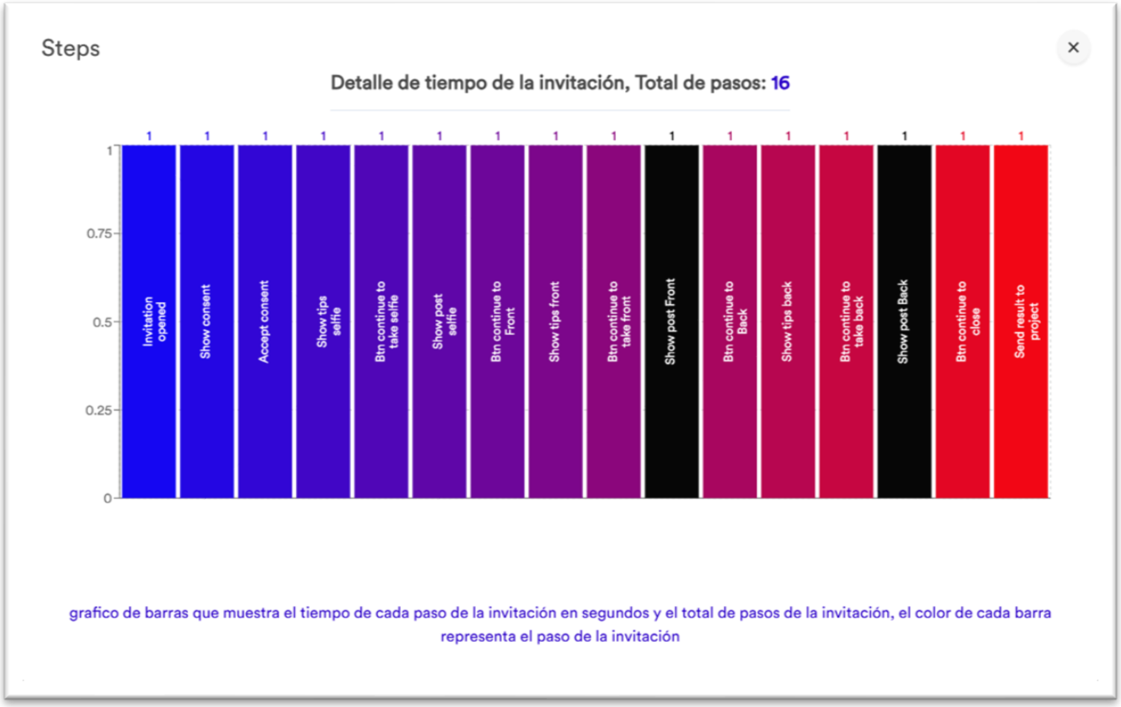
View Summary: You will be able to see the summary of the transaction.



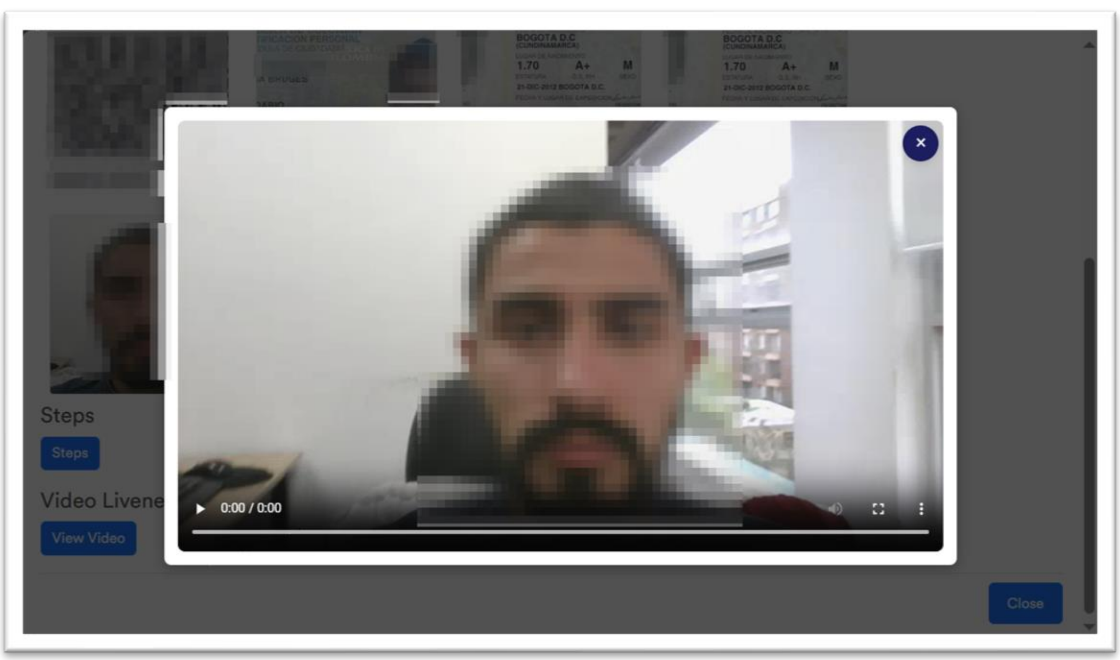
Clicking on “View Summary” will allow you to see more information about the transaction and two additional options: “Steps” and “View Video”.



Clicking on “Steps” will allow you to see a graph of the steps that were taken and the count. This count may vary depending on how many times the step is repeated, whether due to refreshing the page, leaving the process and then continuing, or simply repeating any of the steps.

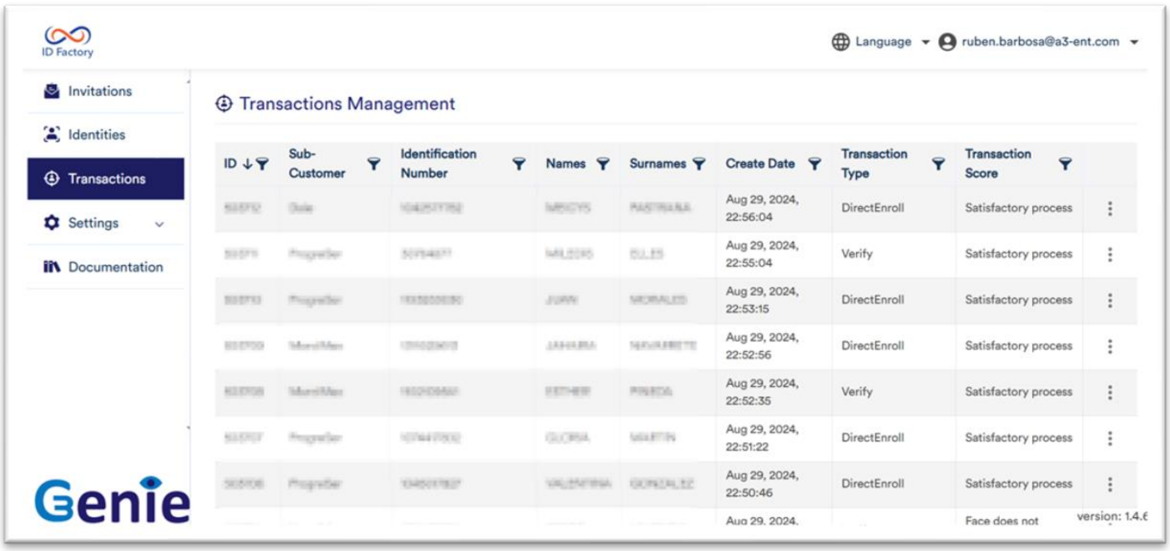


If the “View Video” option appears, it means that the “Selfie” step was used for authentication or enrollment. You will be able to see a short recording of the moment when the person was enrolled or verified, which will show proof of life.

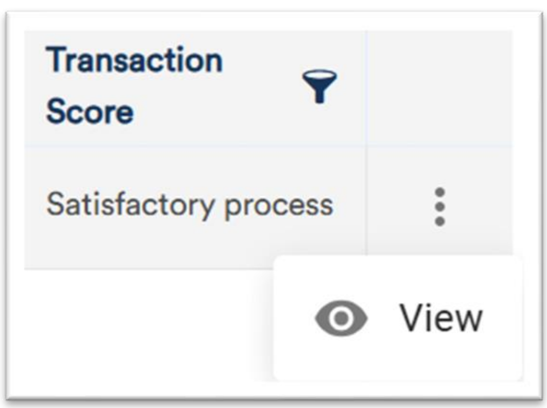


4. Transactions

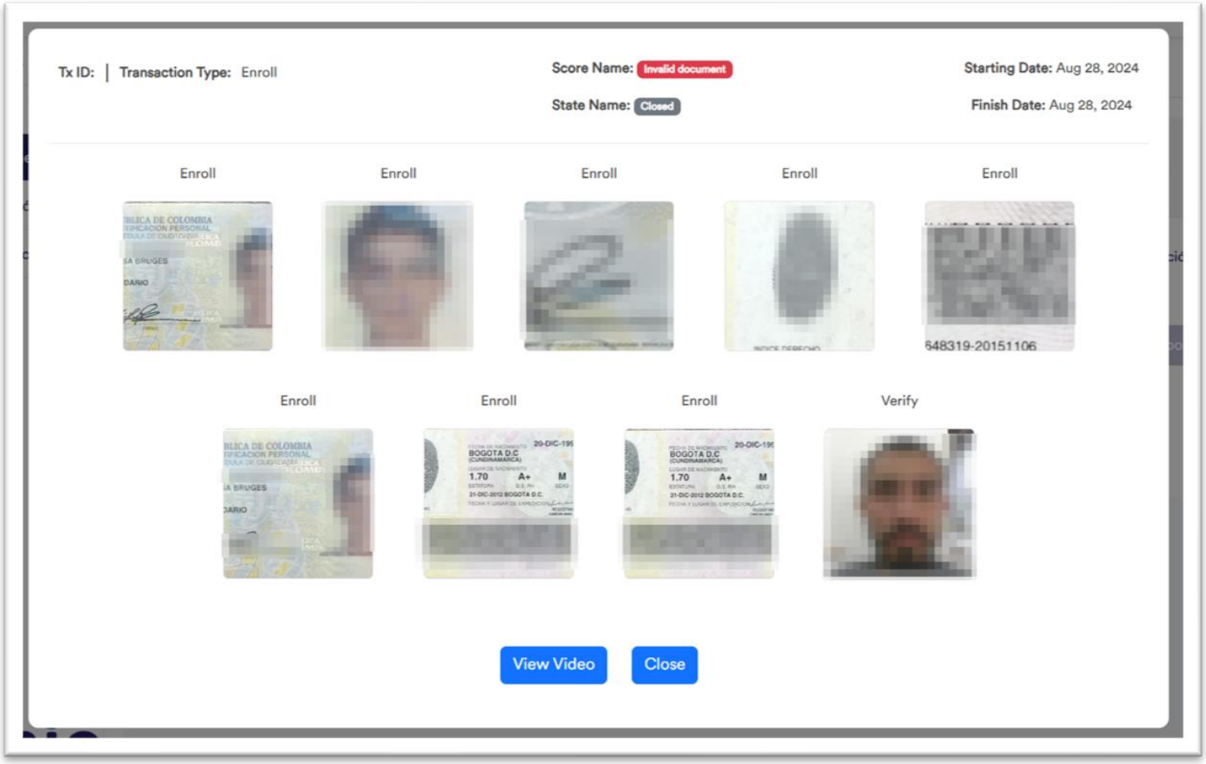
In this section, only the transactions of the client or clients associated with your user will be listed. It contains the same filtering and sorting options.



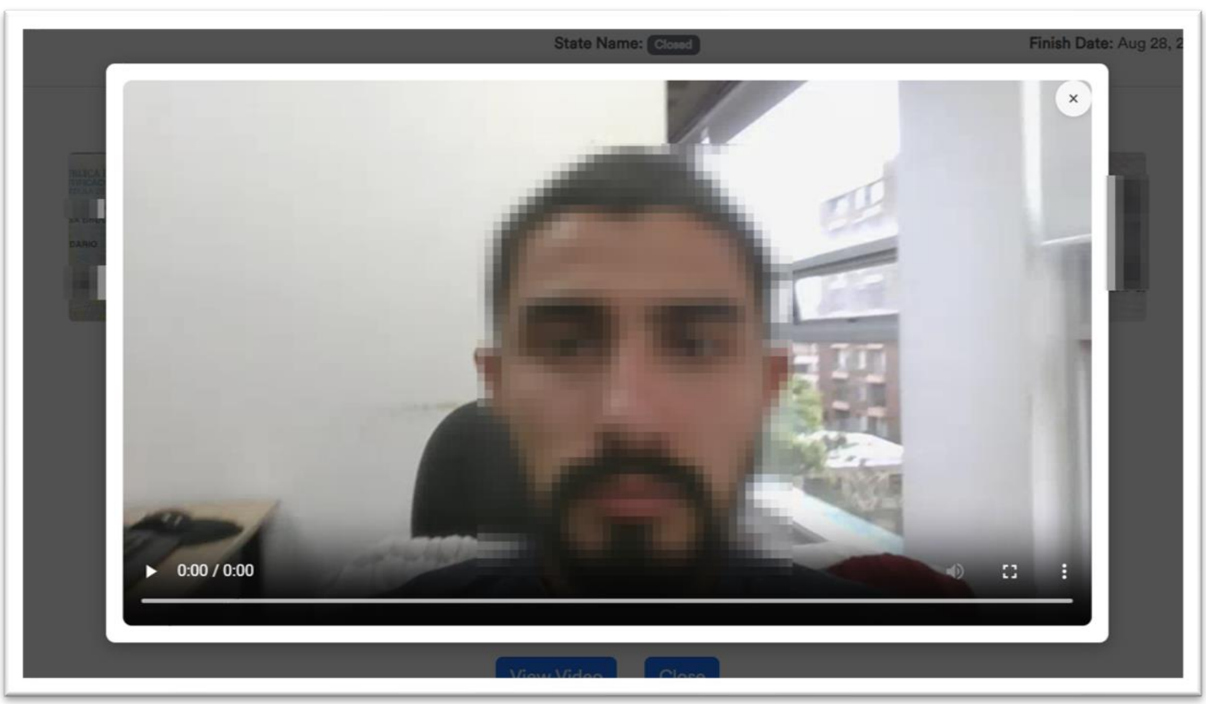
In the last column, you will see three dots with the option to "View.".



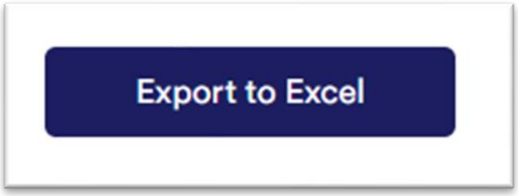
Clicking on "View" will allow you to see the details of that transaction.



In the "View Video" option, you will also be able to see the video of the moment of the transaction, whether it is enrollment or verification, which will provide proof of life to demonstrate that it is not fraudulent.



In the lower left corner, you will see the option to export the data.

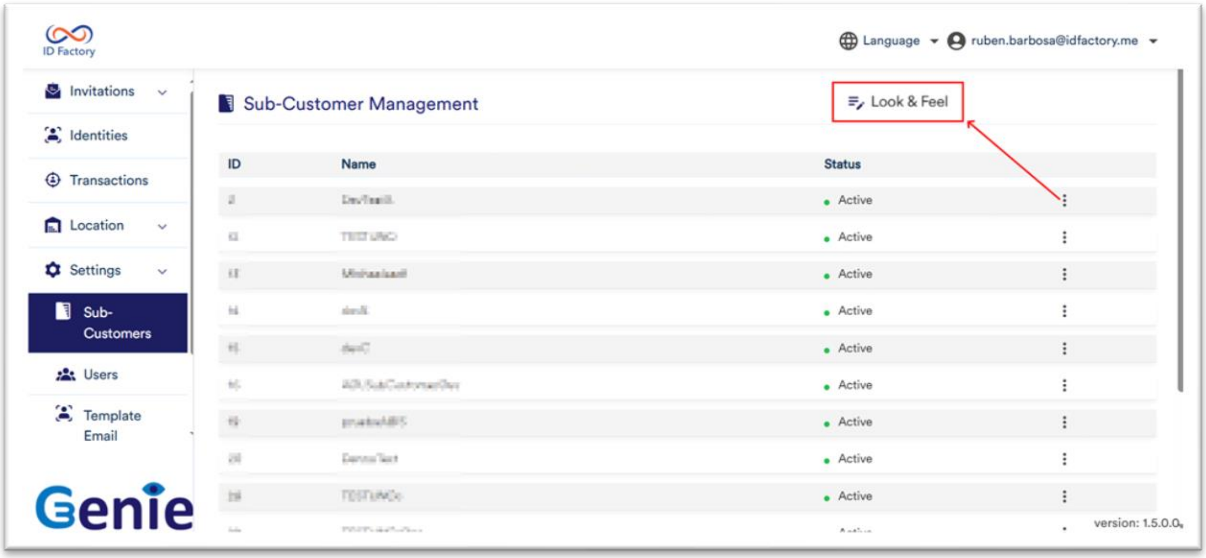


5. Settings

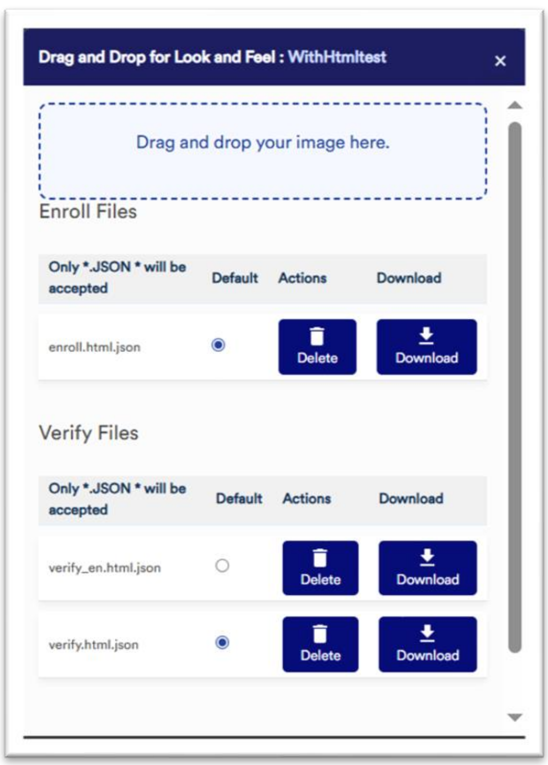
This option has a dropdown list; clicking on it will show you the options for “General,” “Customers,” “Sub-Customers,” “Users,” “Template Email,” and “Template SMS”.

Clicking on “General” will allow you to view and configure all the general options of the platform. You will need to expand the section you need to view or configure and make the necessary adjustments.

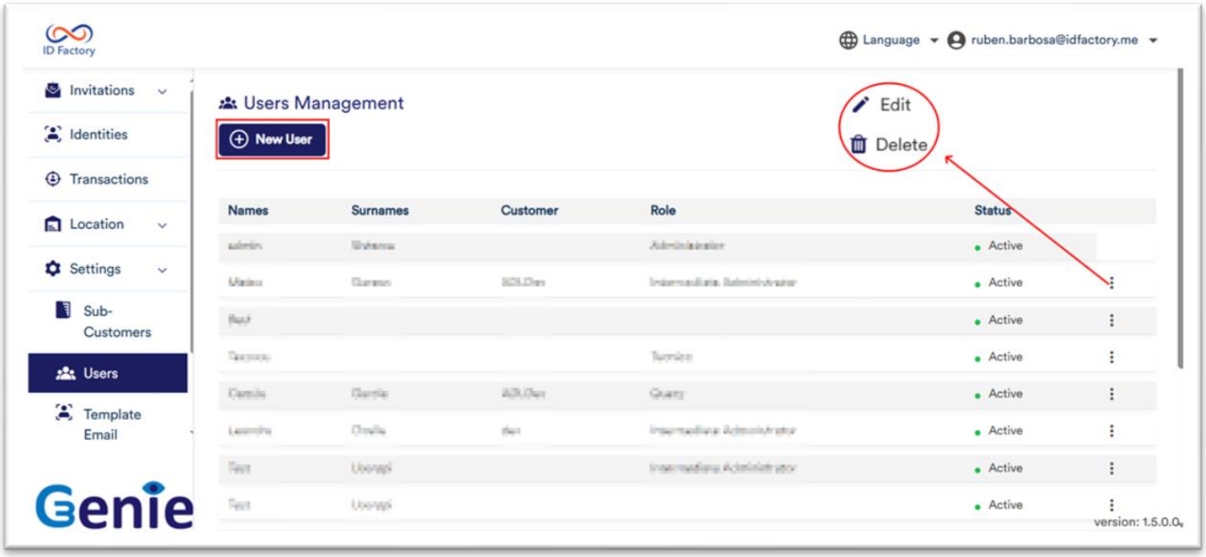
In the “Sub-Customers” option, the system will display a list of all the sub-customers created and active to date. Clicking on the three dots at the end of each line will enable three options: “Edit,” “Look & Feel,” and “Delete”.



The “Look & Feel” option will allow you to upload the HTML files for the sub-customer for verify and enroll, and you must set at least one as default in each routine. The system allows multiple file uploads.

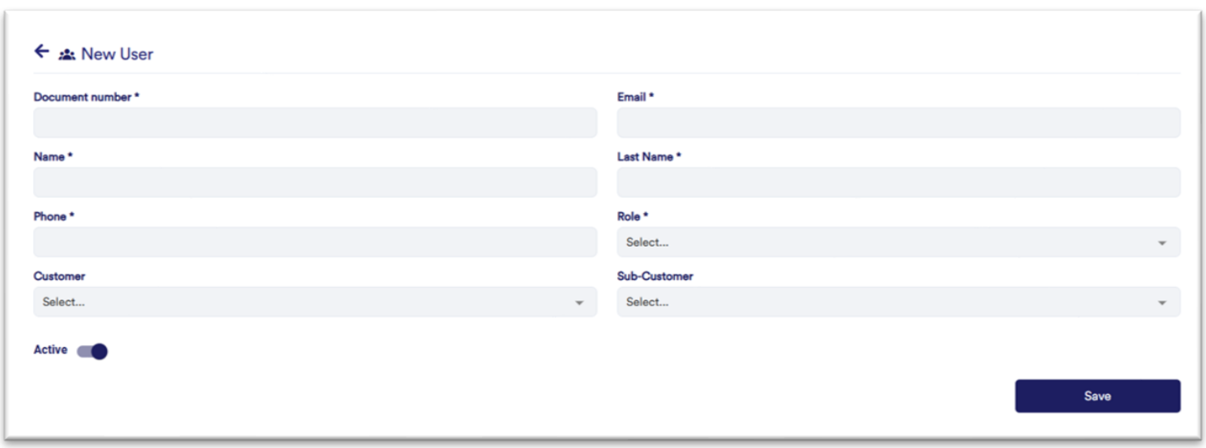


The “Users” submenu will display a list of all active users created in the system. It will also allow you to create, edit, and delete a sub-customer based on the option you click.

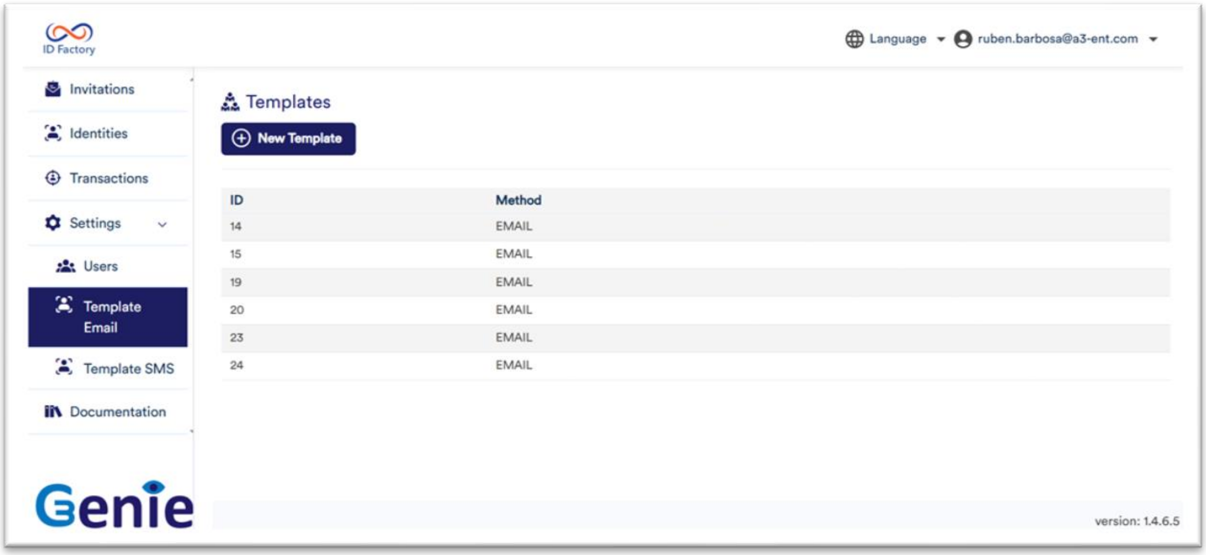


When you click on “New User,” the system will open a window with the necessary fields to create a user. In the “Role” option, the roles that you can assign to the new user will be listed. In “Customer” and “Sub-Customer,” you will see the list of enabled clients and sub-customers that can be assigned to the user.

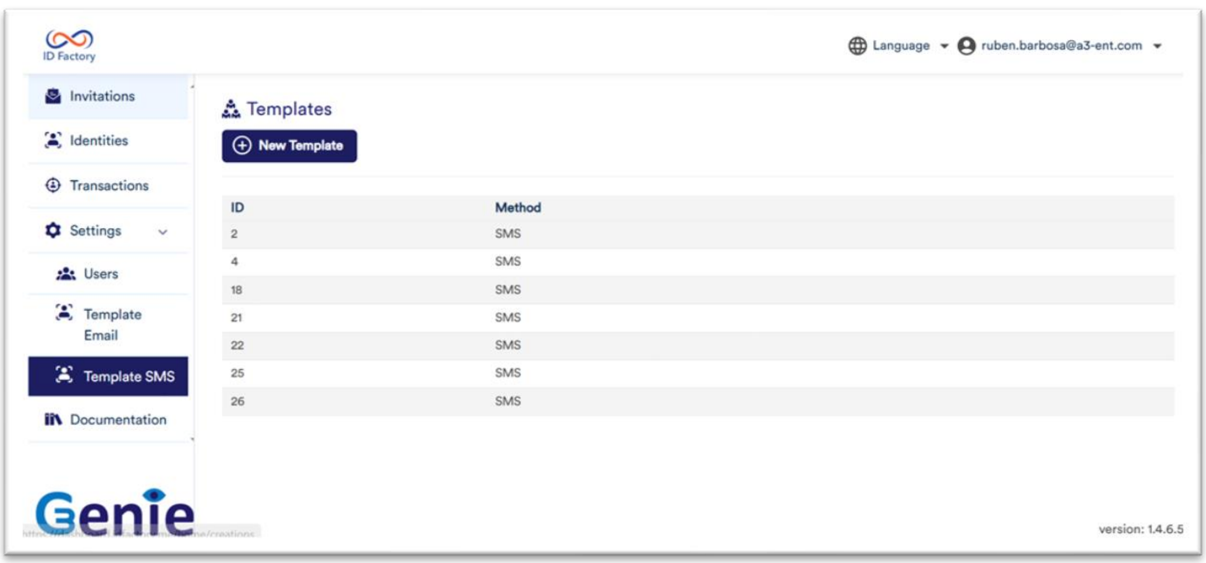
The fields marked with an asterisk are mandatory.



Clicking on “Template Email” will display a list of the templates that will be used when creating an invitation or performing a verification.

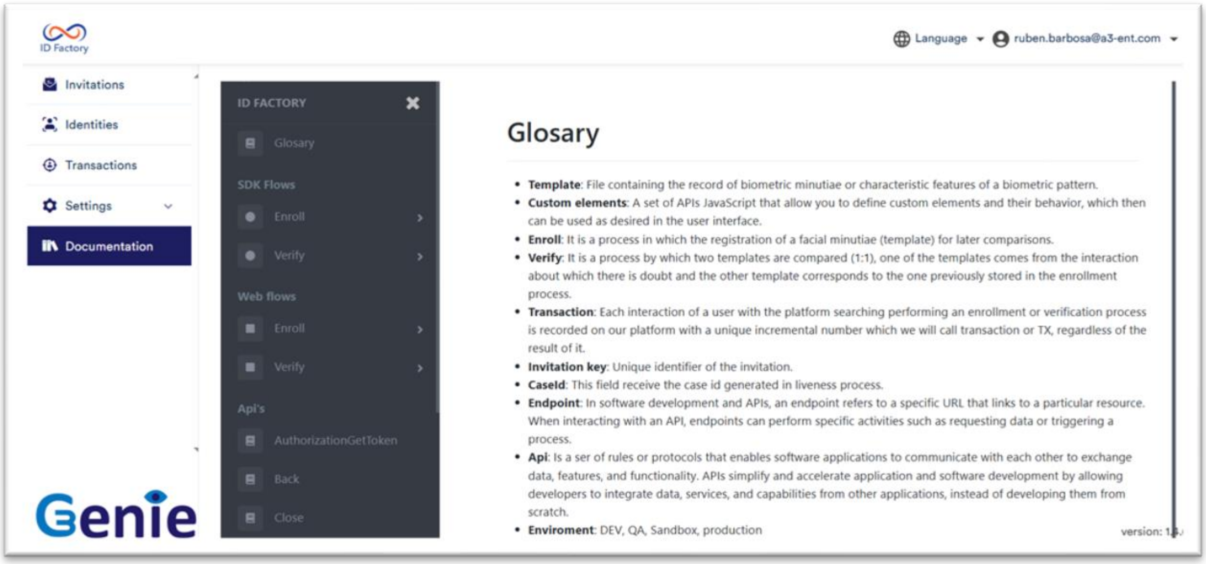


Clicking on “Template SMS” will display a list of the templates that will be used when creating an invitation or performing a verification.



6. Documentation

This option provides access to the technical documentation needed to understand the processes of the platform.



Creado por	Fecha	Versión
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Rubén Barbosa	11/10/2024	1