

# Install, setup and test AliceGo

v1.4

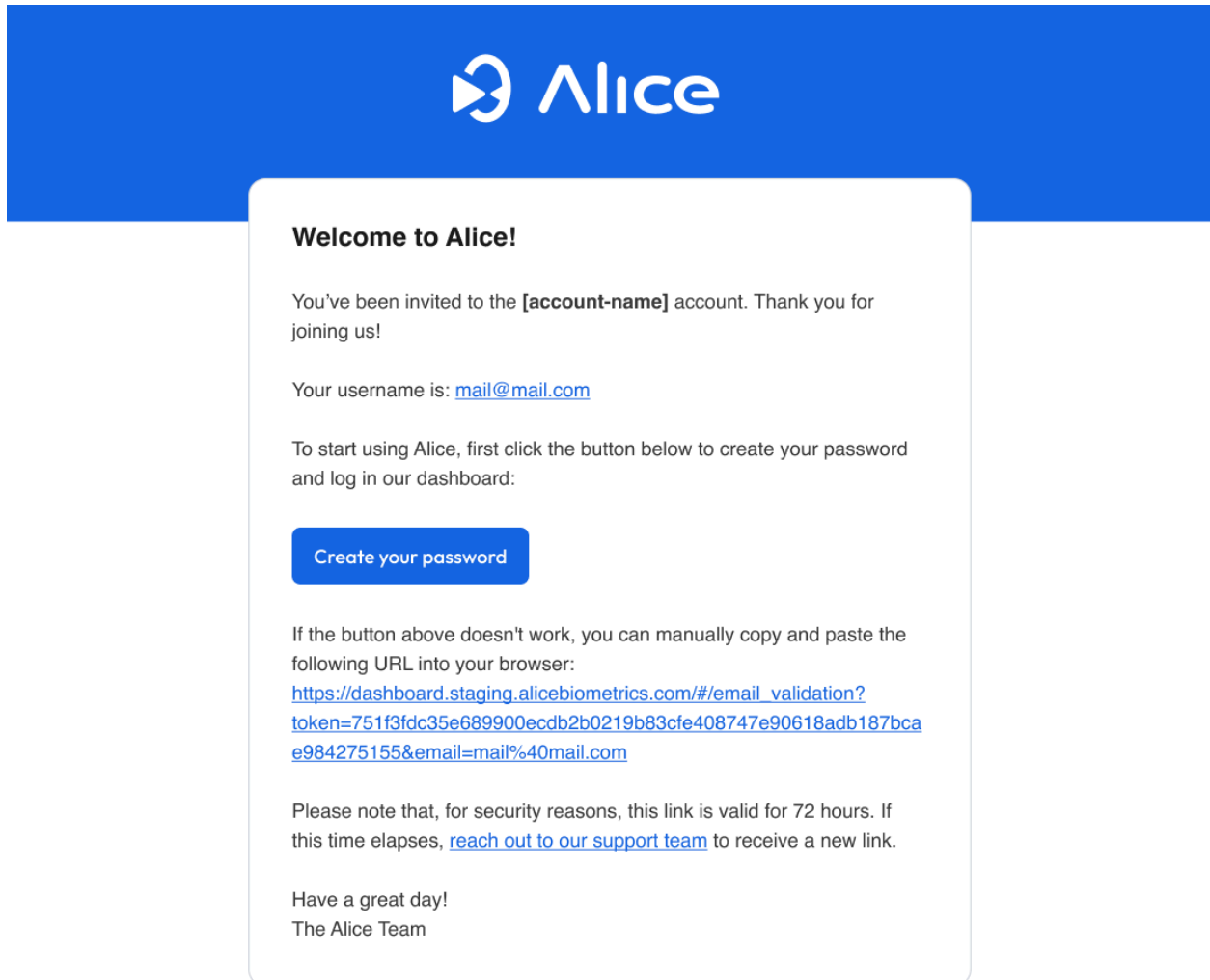


# Step by step

During this guide, we are going to describe all the steps a new AliceGo customer has to complete in order to be able to test and validate the solution.

## 1) Accept the invitation

When a new credential is generated, the user who had requested this access, receives an automatic mail which allows this user the access and use of the platform.



You are receiving this email because you got registered in our platform. If you didn't, please, ignore this email.

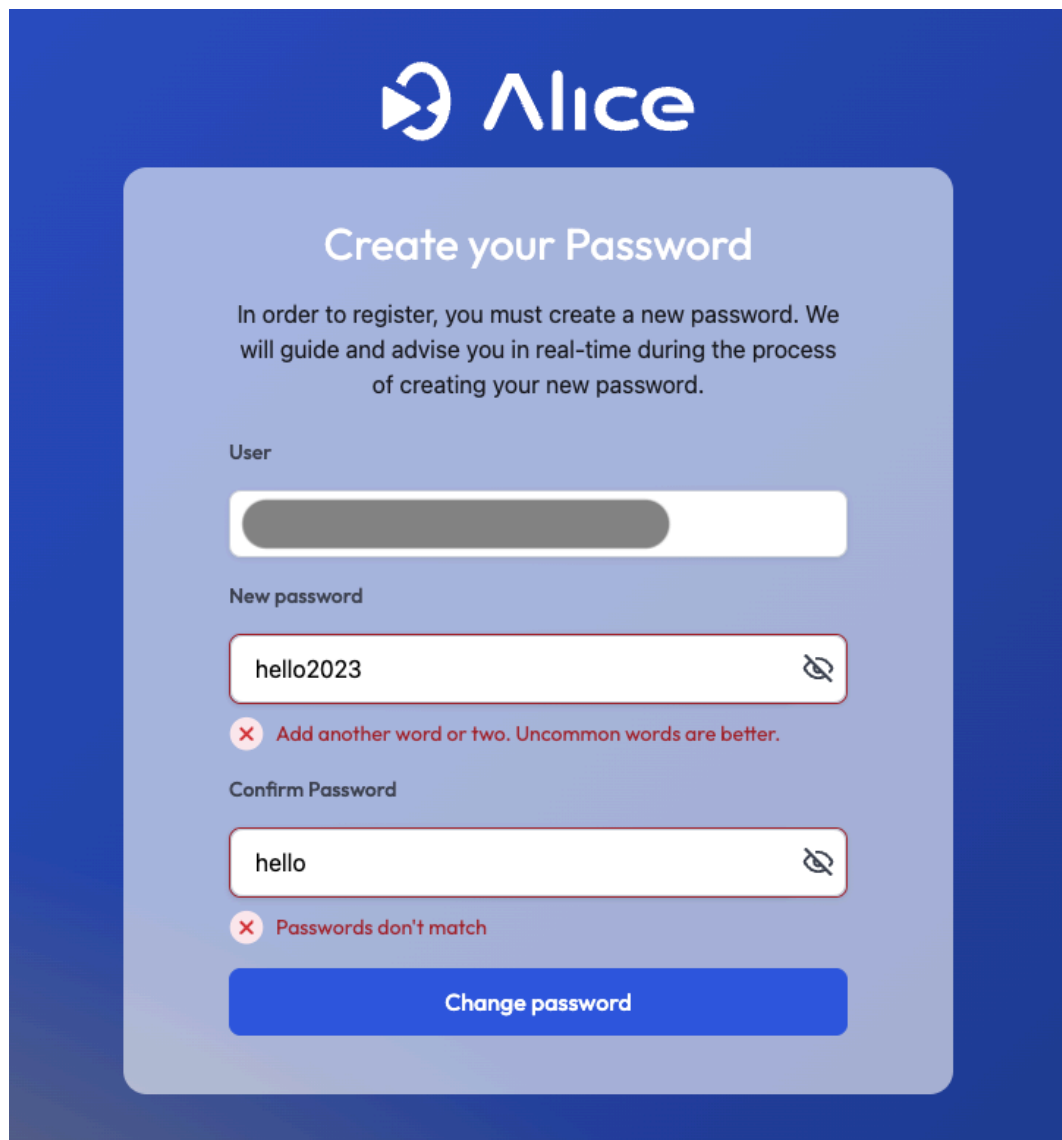
Alice Biometrics S.L.

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## 2) Set a password

Users must set a valid password to associate it with its account. The password needs to follow a minimum requirement. Concretely;

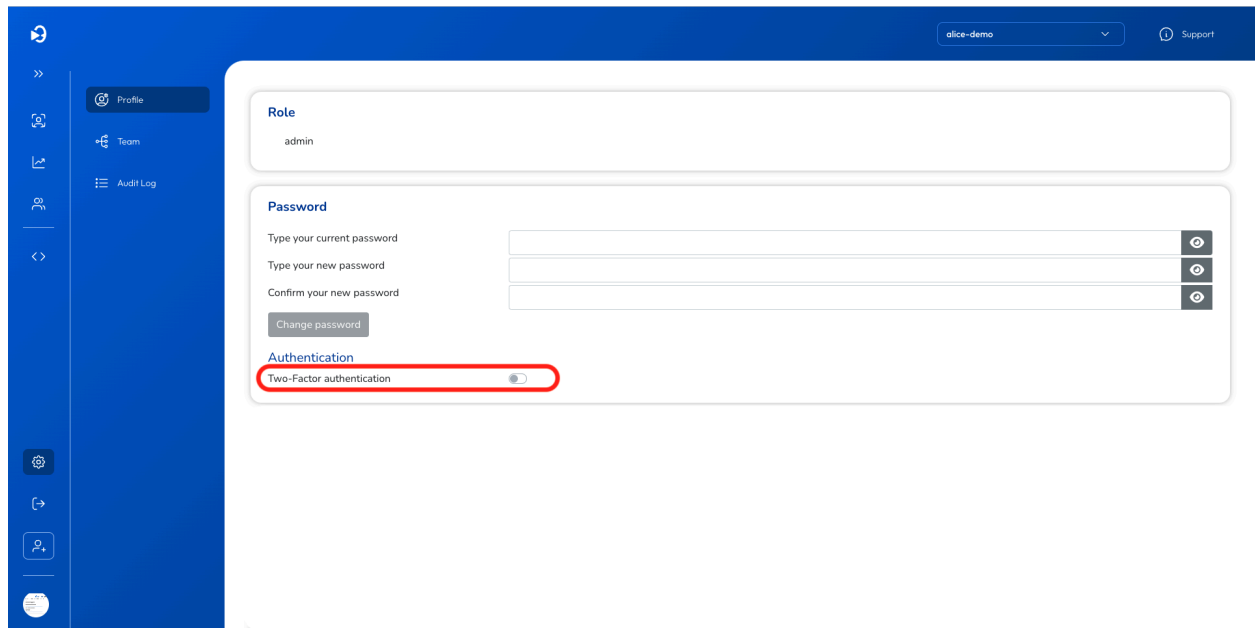
- Minimum length of 8 characters.
- There are no excluded characters, all are allowed.
- The chosen password must follow the following rules (the tool itself will give feedback to the user if any of them fail):
  - Do not use common words
  - More than a single word
  - Do not repeat words or characters
  - Don't use sequences
  - Do not use dates



The screenshot shows a web interface for creating a password. At the top, the 'Alice' logo is displayed. Below it, the heading 'Create your Password' is centered. A message states: 'In order to register, you must create a new password. We will guide and advise you in real-time during the process of creating your new password.' The form consists of three main sections: 1. 'User' with a text input field. 2. 'New password' with a text input field containing 'hello2023' and a red error message below it: 'Add another word or two. Uncommon words are better.' 3. 'Confirm Password' with a text input field containing 'hello' and a red error message below it: 'Passwords don't match'. At the bottom of the form is a blue button labeled 'Change password'.

### 3) User should enable 2FA mechanism to secure its Dashboard access

Once inside the Dashboard, it is recommended to enable the 2FA mechanism. To do this, you must access the profile (account/profile or icon located at the bottom left) and activate it from there. In this way, it is guaranteed that each time you enter the Dashboard, you are asked to enter an OTP key, thus verifying the identity of the user by having to insert the key available in your 2FA application.



The screenshot displays a user profile dashboard with a blue sidebar on the left. The sidebar contains icons for navigation and a user profile icon at the bottom. The main content area is white and contains the following sections:

- Role:** A box showing the role as "admin".
- Password:** A section with three input fields for "Type your current password", "Type your new password", and "Confirm your new password". Each field has a toggle icon on the right. Below the fields is a "Change password" button.
- Authentication:** A section with a toggle switch for "Two-Factor authentication". The toggle is currently turned off, and the entire section is highlighted with a red rectangle.

#### 4) User can invite to the rest of its team from “Add colleagues” Dashboard button

Dashboard section where an admin user can manage its teammates access: invite, revoke, change role, etc.

There are three user roles:

- Viewer → can see general information, but can't perform any action. Hidden sections for viewers users: team and credentials.
- Editor → can see general information and perform certain actions. Hidden sections for editors users: team and credentials.
- Administrator → can see and perform all available information and actions in the system.

Additionally, there is a permission called “Auditor” which can be enabled for any kind of user by an admin. If some user has this property activated will see a new section in the lateral menu “Account/Audit Log” where all actions performed by the team are shown.

The screenshot displays the Admin dashboard interface. On the left is a blue sidebar with navigation icons and links for Profile, Team, and Audit Log. The main content area is titled 'Admin' and features a table of users. Below the table is a pagination control showing 'Previous', '1', '2', and 'Next'. At the bottom of the main area is an 'Add user' form with fields for Email and Role (set to Viewer), a description of the Viewer role, and an 'Add user' button.

Email	Created at	Last login	Role	Auditor permission	State	Verified	Delete
	2021-06-23 15:38:24	2023-09-22 10:50:57	Admin	<input checked="" type="checkbox"/> Active	<input checked="" type="checkbox"/> Active	<input checked="" type="checkbox"/>	
	2021-08-27 13:58:41	2023-04-28 09:47:59	Admin	<input type="checkbox"/> Inactive	<input checked="" type="checkbox"/> Active	<input checked="" type="checkbox"/>	
	2019-01-01 01:00:00	2023-09-25 15:49:47	Admin	<input checked="" type="checkbox"/> Active	<input checked="" type="checkbox"/> Active	<input checked="" type="checkbox"/>	-
	2022-11-08 13:08:16	2023-01-27 10:27:42	Admin	<input type="checkbox"/> Inactive	<input checked="" type="checkbox"/> Active	<input checked="" type="checkbox"/>	
	2022-12-16 12:58:31	2023-06-16 10:30:18	Admin	<input type="checkbox"/> Inactive	<input checked="" type="checkbox"/> Active	<input checked="" type="checkbox"/>	

Previous 1 2 Next

**Add user**

Email

A verification email will be sent to this address

Role

The Viewer role is oriented to reviewers who do not need to interact during the onboarding process through the dashboard. It allows to review user data but not to perform any action

**Add user**

## 5) Access to Flow configuration settings

Firstly, you need to define your onboarding flow before starting with your first user onboarding. Alice creates one configuration by default, so you can edit/override it or create a new one.

The screenshot shows the 'Alice Flows' configuration page. On the left is a dark blue sidebar with navigation icons and labels: '>>', 'Developers', 'Flows' (highlighted), 'Demos', '<>', a settings gear, a share icon, a user icon with a plus sign, and a profile picture. The main content area has a top bar with 'cliente-dev' and a 'Support' link. Below this, the title 'Alice Flows' is followed by a '+ New onboarding flow' button and a placeholder text 'Lorem ipsum dolor sit amet'. A table lists the existing flows:

Name	Onboarding steps	Onboarding flow ID	Actions
National onboarding		e92a20e4-7f66-42ef-9e02-028d62ca2abd	
International onboarding		e92a20e4-7f66-42ef-9e02-028d62ca2abd	

## a) Onboarding steps

You must define which steps will be asked to the user. For a usual Onboarding scenario, we suggest a selfie plus an ID card. The process will end once the user uploads all this evidence configured.

The screenshot shows the 'National onboarding' configuration interface. On the left is a sidebar with navigation icons and a menu with 'Developers', 'Flows', and 'Demos'. The main area has a 'Back' button and an 'Edit information' link. Below the title, there's a description placeholder. The '1. Onboarding steps' section contains a text area with placeholder text and a blue '+' button. To the right, a 'Select a new onboarding step' panel lists three options: 'Document capture' (with a document icon), 'Selfie capture' (with a person icon), and 'Selfie with document challenge' (with a person and document icon).

This screenshot shows the same configuration screen after adding steps. The '1. Onboarding steps' section now contains three items: 'Document capture ID Card', 'Document capture Drivers License', and 'Selfie capture', each with its respective icon. A blue '+' button is still present. The 'Select a new onboarding step' panel is now titled 'Document capture' and shows a 'Type of document' section with radio buttons for 'ID Card' (selected), 'Drivers license', 'Passport', 'Residence permit', and 'Other trusted document'. A 'Delete step' button with a trash icon is located at the bottom right of the steps list.

## b) Decision criteria

When users finish their onboarding processes, they go to “To Review” state. However, you can define the criteria to move them to “Accepted” or “Rejected” states, configuring its logic.

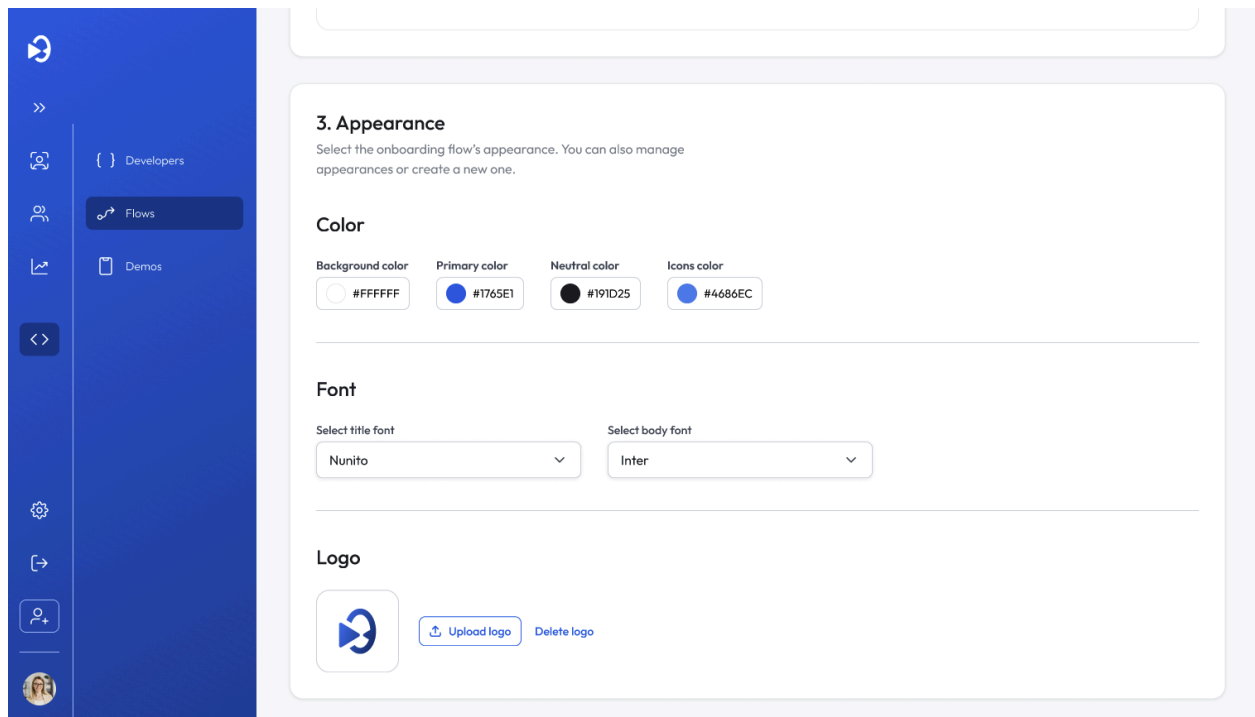
The screenshot displays a configuration interface for decision criteria. On the left is a blue sidebar with navigation icons and labels: 'Developers', 'Flows', and 'Demos'. The main content area is divided into three sections:

- Auto KO criteria** (indicated by a red icon and text):
  - IF  Document security
  - OR  Selfie security
  -
- Auto OK criteria** (indicated by a green icon and text):
  - IF  Document security
  - AND  Selfie security
  - AND  Proces security
  - AND  Document read
  -
- To review** (indicated by an orange icon and text):
  - ELSE



## c) Appearance

You also can define the visual appearance and set your company branding.



## 6) Verify the identity of your users

Once you set your configuration, you are ready to verify the identity of your users.  
You can create the users manually from Alice Dashboard just by clicking on “Create User”.

The screenshot shows the AliceGo Users dashboard. At the top, there is a header bar with filters, a search bar, and a '+ Create user' button. A red arrow points from the 'Create user' button to a modal form titled 'Create user'. The modal form contains the following fields:

- Email:
- Name:
- Last name:
- Flow:
- Appearance:

At the bottom of the modal, there are 'Cancel' and 'Ok' buttons.

Once the user is created you will be able to send the Onboarding process copying the link from the Dashboard or sending directly and standar email from Alice.

The screenshot shows the AliceGo Users dashboard with a table of users. A red arrow points from the 'AliceGo' button in the table to a modal form titled 'AliceGo Link'. The modal form contains the following fields:

- Link:

At the bottom of the modal, there are 'Copy' and 'Send email' buttons.

## **7) User goes to Alice's Dashboard in order to check the onboarding result**

After the onboarding process is completed, the user has to go to Alice's Dashboard to check the result.

From the Dashboard users list (<https://dashboard.alicebiometrics.com/#/users>), the onboarding can be searched using the email identifier that was previously used. Once it is found, the customer can see the onboarding result only by clicking on it.

Alice offers another guide called "Use guide" where all information related with the onboarding processes and how it should be interpreted is explained.



**Alice**

[www.alicebiometrics.com](http://www.alicebiometrics.com)