

fintech **OS**

AriadNext 21.2.2000

User Guide

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Overview

The AriadNext automation processor facilitates customer verification processes by validating identity documents and automatically populating entity records in FintechOS applications with text extracted from document scans or photos. Customers can take a picture of their ID card or upload an existing one from their device. The identity data is then captured, examined, and validated based on the automation processor's settings. Once the scanning process is complete, the customer's record populates with their personal information.

IMPORTANT!

All document scans that AriadNext handles are processed and transferred under strict, GDPR compliant, safety policies. Data from AriadNext can be deleted manually from the AriadNext account.

This solution benefits banking and insurance scenarios such as digital onboarding, Know Your Customer (KYC) processes, identity verification processes, and much more.

Key Features

- The ID validation process prevents identity fraud with document verification and facial biometrics.
- Data extracted from documents no longer needs to be added manually.
- Speeds up Know Your Customer (KYC) processes.
- ID cards and documents are captured and checked in real-time without any manual intervention.

Applications

AriadNext can be implemented to simplify paper-driven financial or insurance processes, such as:

- Customer onboarding
- Account opening
- Loan applications
- Compliance related processes
- Claims handling
- Mortgage processing

Installation

IMPORTANT!

Before proceeding with the installation, customers must set up an AriadNext account. The user name and password is obtained from the AriadNext platform. Additional information can be discussed with FintechOS sales representatives.

1 Install the SysPacks

Make sure you have the **SysPacks v.21.2.2000** installed on your system. To do so:

1. Using a web browser, log in to your [FintechOS Community](#) account.
2. Select the **Release Hub**.
3. Open the **FintechOS 22.W** release.
4. Open the **HPFI** folder.
5. Download the **SySDigitalSolutionPackages v21.2.2000.zip** archive.
6. Unzip the archive and follow the instructions in the **How to install FintechOS SysPacks v21.2.2000.pdf** file to install the SysPacks.

2 Set up the AriadNext service subscription key

On the FintechOS Portal or B2C environment, open the **web.config** file in a text editor and add the following entries in the `<appSettings>` section:

```
<add key="FTOSServicesAriadNextEndpoint" value="https://"/>
<add key="FTOSServicesAriadNextAppId" value="AppID"/>
<add
key
="FTOSServicesAriadNextSubscriptionKey" value="SubscriptionKey"/>
```

Key	Value
FTOSServicesAriadNextEndpoint	DCS web app endpoint URL provided by FintechOS.
FTOSServicesAriadNextAppId	ID for the AriadNext service subscription.
FTOSServicesAriadNextSubscriptionKey	Subscription key for the AriadNext service.

Setting up the AriadNext Automation Processor

The AriadNext automation processor consists of a custom flow, a server side script, and two endpoints. Follow the below steps when configuring the processor.

1 Create a generic processor settings group

The AriadNext automation processor must be hosted inside a generic processor settings group. A generic processor settings group can include multiple automation processors and is typically used as a container for the automation processors called by a specific digital journey.

If you already have a generic processor settings group you wish to host your AriadNext automation processor, skip to "[2 Add the AriadNext automation processor to a generic processor settings group](#)" on the next page. Otherwise, follow the instructions below to create a new generic processor settings group:

1. In Innocation Studio, go to **Main Menu > Digital Journeys > Digital Flow Processing**. The **Flow Settings List** page opens.
2. In the **Flow Settings List** page, click the **Insert** button at the top right corner to add a new digital flow settings group. The **Add Digital Flow Settings** page opens.
3. In the **Add Digital Flow Settings** page, enter a **Name** for your digital flow settings group.
4. If you already have a digital journey set up where you wish to call the AriadNext automation processor, select it from the **Digital Journey** drop-down box.

5. Click the **Save and Close** button at the top right corner to save your flow settings group.

2 Add the AriadNext automation processor to a generic processor settings group

1. In Innocation Studio, go to **Main Menu > Digital Journeys > Digital Flow Processing**. The **Flow Settings List** page opens.
2. In the **Flow Settings List** page, double click the desired digital flow settings group.
3. In the **Processor Settings** section, click the **Insert** button.
4. Fill in the following fields:

Field	Description
Name	Enter a name for the processor settings.
Flow Settings	Leave the default value.
Digital Processor Type	Select AriadNext .
Settings	JSON code for the automation processor's settings. For details, see "AriadNext Settings" on the next page .
Mapping	JSON code for the automation processor's mappings. For details, see "AriadNext Mappings" on page 13 .

5. Click **Save and Close** at the top right corner of the screen.

AriadNext Settings

The AriadNext settings are defined in JSON format as key-value pairs. The following settings are available:

Setting	JSON Key	Description
UID File	FileUIDAttribute	The name of the source entity attribute on which the unique ID of the AriadNext file is saved. Later it can be used to retrieve reports. By default, it is generated as "file-" + "recordID" of the entity source.
Workflow entity	SourceEntityPrimaryAttributeName	The name of the attribute on which the primary key is stored for the source entity, written without a slash. Example: FTOSTestProcessorsId.

Setting	JSON Key	Description
Workflow entity	SourceEntityName	<p>The entity associated with the business workflow (digital journey) that calls the OCR process.</p> <p>Needed only if the OCR process is used on an edit form (to alter an existing record) to update the workflow entity's business status after the scan (see BusinessStatusSuccess and BusinessStatusFail).</p> <p>If the OCR process is used on an insert form (to create a new record), this key is not needed.</p>
Redirect in case of success	MaskNextStepUrlSuccess	<p>Location in the user interface where the user is redirected after a successful scan.</p> <p>entity – Entity name.</p> <p>form – Form name of the above entity.</p> <p>section – Optional parameter for the section name of the above form.</p>

Setting	JSON Key	Description
Redirect in case of failure	MaskNextStepUrlFail	<p>Location in the user interface where the user is redirected after the maximum number of failed scan attempts (see "MaxRetry" below).</p> <p>entity – Entity name.</p> <p>form – Form name of the above entity.</p> <p>section – Optional parameter for the section name of the above form.</p>
Maximum number of scan attempts	MaxRetry	<p>If this number of failed scans is reached, the user will be redirected according to the specifications in the MaskNextStepUrlFail.</p>
Business status update in case of success	BusinessStatusSuccess	<p>Business workflow status update of the Workflow entity if the scan is successful.</p> <p>Needed only if the OCR process is used on an edit form (to alter an existing record).</p> <p>If the OCR process is used on an insert form (to create a new record), this key is not needed.</p>

Setting	JSON Key	Description
Business status update in case of failure	BusinessStatusFail	<p>Business workflow status update of the Workflow entity if the scan fails.</p> <p>Needed only if the OCR process is used on an edit form (to alter an existing record).</p> <p>If the OCR process is used on an insert form (to create a new record), this key is not needed.</p>

Example

Sample JSON code for AriadNext settings

```
{
  "FileUIDAttribute": "fileUID",
  "SourceEntityPrimaryAttributeName":
  "FTOSTestProcessorsId",
  "SourceEntityName": "FTOS_Test_Processors",

  "maskNextStepURLSuccess": {
    "entity": "FTOS_Test_Processors",
    "form": "AriadNext",
    "section": "SuccessStep"
  },
  "maskNextStepURLFail": {
    "entity": "FTOS_Test_Processors",
    "form": "AriadNext",
    "section": "ErrorStep"
  }
}
```

AriadNext Mappings

The AriadNext mappings match the field names as returned by the OCR processor (keys) with the populated entities' attributes (values).

Setting Name	Description
DocumentsMapping	Holds attribute mappings for various types of scanned documents.
Type	Scanned document type as defined in the list of "AriadNext Settings" on page 9.
Map	Key-value pairs that match the field name as returned by the OCR processor (the key) to the attribute name in the destination entity (the value).

Example

Sample JSON code for AriadNext mappings

```
{
  "DocumentsMapping": [
    {
      "type": "IdRom",
      "Map": {
        "LastName": "lastName",
        "GivenName": "firstName",
        "DocumentNumber": "IdCardSeries",
        "StreetType": "streetType",
        "PersonalNumber": "PIN",
        "BirthDate": "dateOfBirth",
        "PlaceOfBirthBody": "placeOfBirth",
        "BirthCountryBody": "birthCountry",
        "Address": "fullAddress",
        "Sex": "gender",
        "DistrictCode": "DistrictId",
        "Nationality": "nationality",
      }
    }
  ]
}
```

```
    "City": "CityId",
    "Street": "StreetName",
    "StreetNo": "StreetNo",
    "Storey": "FloorNo",
    "Stairway": "Stairway",
    "ApartmentNo": "ApartmentNo",
    "ApHouse": "BuildingNo",
    "IssuedBy": "IdIssueInstitution",
    "IssuedAt": "IdIssueDate",
    "IssuedUntil": "IdExpirationDate",
    "IssuingCountry": "issuingCountry"
  }
}
]
```

Adding AriadNext to a Digital Journey

1. Open the digital journey in Innocation Studio.
2. Make sure that the form you want to populate includes a button to call the AriadNext automation processor.
3. Click the **Advanced** tab.
4. Click the **After Events** subtab.
5. Add the following code in the **After Events** window:

```
var dfpHelper = ebs.importClientScript('FTOS.DFP');
var p = {};
p.flowSettingsName = formData.FlowSettings;
p.processorSettingsType = 'AriadNext';
p.processorSettingsName='AriadNext_Settings';
var recordId = formData.id;
var rec2= ebs.getCurrentEntityId();
ebs.callActionByName("FTOS_DFP_FlowProcessorSettingsByType",
p, function(e)
{
    var processorSettingsId =
e.UIResult.Data.ProcessorSettingsId;
    dfpHelper.loadComponent("FTOS_DFP_AriadNext",
processorSettingsId, ebs.getCurrentEntityId(), false);
});
```

6. Click the **Save and Close** button at the top right corner to save the digital journey.