

NOTARY CAM ON BOARDING

Account Set up and User Creation

Welcome to NotaryCam! Your Enterprise Account is now ready for set up. The administrator for your account will receive an email once your account has been created.Once the administrator has logged in to the account, additional administrator accounts, notary accounts, and auditor accounts can be created and shared to all participants. This guide will outline how to set up these accounts, views and permissions for each user.

Enterprise administrator Account Review:

Step 1: Locate your Welcome Email in your email for first time login and password creation
 Visit <u>secure@notarvcam.com</u> to login any other time.

Sign in	
Email *	
Password *	
I agree to the aSign consent below and have read and accept the NotaryCam Terms of Service Consumer Disclosure - Conducting business electronically, receiving electronic indices and disclosures, and signing documents electronically.	*
Forgot password? Reset password NotaryCam Notary Sign In	

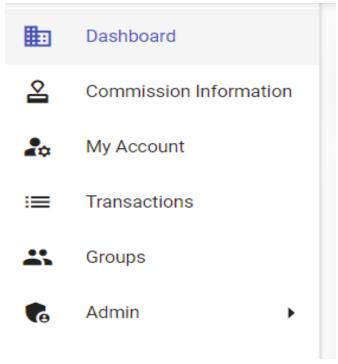
Step 2: The user Dashboard will appear once you are logged in. This is where all the transactions that occur will display, but first we need to set up the account. Select the dropdown on the upper right hand side of the screen by the icon and select manage account.

	NotaryCam	@~
	CREATE TRANSACTION	
	Dashboard	
	Search	8
0	Date Range 🔻	Sort by Latest 🔻
	•	
	Enterprise Admin enterprise.admin@gmail.com	
	Manage your account	
	Log out	

Step 3: Once you click on the manage your account button, you will see the Notarycam Management System (NCM)

≡	Notary	/Cam Management	System				:: e
	Dashboard	Test			🧪 Update Enterprise Nam	e + Create Department	← Go Back
2	Commission Information						
20	My Account	Departments	See All	Groups	See All	Users	See All
:=	Transactions	Search department		Search group	_	Search user	
	Groups	search department		search group		Search user	
•	Admin 🕨	Department Name	Department Id	Group Name	Department	First Name	Last Name
		Global	61452b1d52dc16001c8b182	notary	Global	Enterprise	Admin
		Department A	614a2718113edb001581a03	auditor	Global	Department	Admin
		Department B	614a271d113edb001581a04	admin	Global	Department A	Admin
				notary	Department A	Department B	Admin
				auditor	Department A	Department AB	Admin
				admin	Department A	Department A	Notary
				notary	Department B	Department B	Notary
				auditor	Department B	Department AB	Notary
			_	admin	Department B		

This screen allows all Enterprise administrators to add and create roles for other users. Only the Enterprise administrator will be able to see all of the different sections listed on the far left side under Dashboard. The available options for the Enterprise administrator to see and make changes to are as follows:



- Commission Information
 - This is where notaries house their licensing information, they are required to enter the below information before they can complete a transaction in the system
 - Commission County Name
 - E&O Expiration Date
 - Commision Expiration Date
 - E&O Amount
 - Commission Number Identifier
 - Bond Expiration Date
 - State Code
 - Bond Amount
 - Commission Seal
 - Identrust Certification in p12 format

Dashboard					
Commission Inform	My Commissions				
Arr My Account					
:≡ Transactions	Commission County Name	E&O Expiration Date	Ē		
Groups				Add Commission Seal Image	
G Admin	Commission Expiration Date *	E&O Amount		Only PNG images allowed	
	Commission Number Identifier * * required	Bond Expiration Date	Ē	Add Identrust .p12 Certificate	
	State Code * 👻	Bond Amount			
		Sav	e changes		

- My Account
 - Below is the information that needs to be entered by each individual that is setup in the system.

- Name
- Suffix
- First Name
- Middle Name
- Last Name
- Phone

	Notar	yCam Manageme	nt System				п ө ~
	Dashboard						
2	Commission Information	My Account					
20	My Account						
.=	Transactions		Name			Phone	
	Groups				Phone		Save
	Admin 🕨	Name Prefix	Name S	uffix			
		fini Nama * Enterprise	Middle Name	Last Name * Admin Reg Save	arycam.com		

Transactions

This area will show all transactions that have been created, the Enterprise administrator will be able to see all transactions within the system.

	Nota	ryCam Management Sy	stem				0	e ~
≣ 2 ₽	Dashboard Commission Information My Account	Transactions Search Transaction						
:=	Transactions	Created ~	Status	Documents	Participants	ID		
	Groups	10/1/2021, 14:35	Complete	15	8	615762f759369f0019387cbd		-
	Admin 🕨	9/29/2021, 20:26	Transaction Created	1	2	6155122913d7220014a19a88		
6	Admin 🕨	9/29/2021, 20:23	Transaction Created	0	1	615511a8c6fa870012403d92		
		9/29/2021, 20:23	Transaction Created	0	1	6155117413d7220014a19a28		
		9/29/2021, 20:22	Transaction Created	0	1	61551144c6fa870012403d7a		
		9/29/2021, 20:17	Transaction Created	0	1	6155102159369f001937d72c		
		9/29/2021, 19:11	Complete	3	10	615500cc73ec0a001979e0fe		
		9/29/2021, 14:35	Transaction Created	0	1	6154c01540de150012942221		
		9/29/2021, 14:30	Transaction Created	0	1	6154bebc73ec0a001979bf83		
		9/29/2021, 13:33	Complete	18	4	6154b17bb38a76001cffdfa3		

- Groups
 - This section is where the Enterprise administrator can set up groups for their different categories like Global, Department A or Department B. The rows are listed out by name, department, users (total in that department) and ID. Roles that can be setup under the groups are listed below:
 - Department administrator
 - Auditor
 - Notary

	Notar	yCam Managemer	nt System		:
iii & I∾ iii	Dashboard Commission Information My Account Transactions	Groups Search Group			
**	Groups	Name	Department	Users	Id
C e	Lusers	auditor	Global Global	0	61452b1d52dc16001c8b182e 61452b1d52dc16001c8b182d
		admin notary	Global Department A	1	61452b1d52dc16001c8b182f 614a2718113edb001581a03a
		auditor admin	Department A Department A	0	614a2718113edb001581a03b 614a2718113edb001581a03c
		auditor	Department B Department B	0	614a271d113edb001581a04c 614a271d113edb001581a04b
		admin	Department B	2	614a271d113edb001581a04d

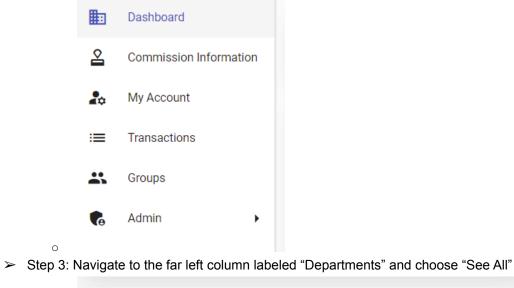
- Administrator
 - Users This section allows the users to filter by Notary, administrator, Auditor and None. The search allows for text to be entered to find the desired user along with the ability to create a user from scratch. The details for the users is listed below:
 - First Name
 - Last Name
 - Email Address
 - Group

≡	Notary	Cam Management	System			∷ ⊖ ~
₽	Dashboard					
2	Commission Information	Search a user	Filter by Group:	Notary Admin Auditor	None	+ Create User
20	My Account					
:=	Transactions	First Name	Last Name	Email	Group(s)	
*	Groups	Enterprise	Admin	enterprise.admin@gmail.com	none	
•	Admin 👻	Department	Admin	global.department.admin@gmail.com	admin	
	Lusers	Department A	Admin	departmenta.admin@gmail.com	admin	
		Department B	Admin	departmentb.admin@gmail.com	admin	
		Department AB	Admin	departmentab.admin@gmail.com	admin	
		Department A	Notary	departmenta.notary@gmail.com	notary	
		Department B	Notary	departmentb.notary@gmail.com	notary	
		Department AB	Notary	departmentab.notary@gmail.com	notary	

Enterprise administrator - How to create departments

If your account has a use case where there are multiple departments, you can create these departments within NotaryCam. If you do not have a use case for departments and everything will be global, you can bypass this step.

- > Step 1: Locate the Notarycam Management System using Steps 1-3 above.
- > Step 2: Navigate to the dashboard within the NotaryCam Management System



		Departmen	ts See All	
	Se	earch department		_
		Department Name	Department Id	
		Global	61452b1d52dc16001c8b18	
		Department A	614a2718113edb001581a0	
		Department B	614a271d113edb001581a0	
∘ ➤ Step 4: 0	Click "C	Create Department" on th	ne far right	
Ο	Depar	tments		+ Create Depart

 \succ Step 5: In put the department name and click Create New Department

	Create Department	
	Department Name *	
	* required	
		Cancel
0		
> Repeat s	teps until all departments are set up	

Enterprise administrator - How to create a new user account

- > Step 1: Locate the Notarycam Management System using Steps 1-3 above.
- > Step 2: Navigate to the dashboard within the NotaryCam Management System

		Dashboard	
	2	Commission Information	
	20	My Account	
	:=	Transactions	
	*	Groups	
	6	Admin	
∘ ≻ Step 3: I	Vavigat	ate to the far right column labeled "Users" and choose "See All"	
		Users See All	
	<u> </u>	Search user	
∘ ≻ Step 4: 0	Click "C	Create User" on the far right	
0	Search a user	er Filter by Group: Notary Admin Auditor None	+ Create User

Step 5: Input all required information for account creation (Name and email). Choose the department if you have several departments. If you would like to allow this account to all departments, global will need to be chosen.

Create Notary				Cancel 📄 Create
,				
Email *				
* required				
Name Prefix	First Name *		Middle Name	
	 required 			
Last Name *			Name Suffix	
* required				
Phone			Date of Birth	
Department(s) *				
Global		*	Group(s)	

Step 6: Once the department or global is chosen, choose the role of the new account (administrator or auditor)

		Global
Department(s) * Global	•	notary
* Required		auditor
		admin
	notarysupport@notar	rycam.com

0

0

Step 7: Click Create User in the top right corner.

	Cancel	Create User
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- 0
- > Step 8: New User will receive a welcome email with instructions on how to login
- ➤ Step 9: Repeat steps for all users

How to decommission a user

When needing to remove a notary from your using your enterprise account follow the steps below. This will not revoke them from logging in, but it will prevent them from creating any further transactions. The notary must still have access to any previous transactions completed.

=	Notary	yCam Management System			:: 0 ~
	Dashboard				
2	Commission Information	Groups			
20	My Account	Search Group			
:=	Transactions				
	Groups	Name	Department	Users	Id
6	Admin				
	LUsers	auditor	Global	0	61452b1d52dc16001c8b182e
	-	notary	Global	0	61452b1d52dc16001c8b182d
		admin	Global	1	61452b1d52dc16001c8b182f

- > Step1: Navigate to your NotaryCam Management System and toggle down to Groups
- > Step 2: Search for the notary that needs decommissioned
- ➤ Step 3: Select the notary
- Step 4:Click the three dots and choose remove user

Users				
Users Assigned To This Group				+ Assign User
First Name ~	Last Name	Email	Id	Action
Department AB	Notary	departmentab.notary@gmail.com	614a6aac26465a2031af355f	:
Department A	Notary	departmenta.notary@gmail.com	614a6a7e26465a2031af355d	:
				e Remove User

User Permissions and Functions

- > Administrator Insight to all transactions globally
 - Create User Roles
 - Create Department Roles
 - Download All Locked Docs
 - View All Docs
 - View All Recordings
 - View All Notary Journal
 - View All Audit History
 - View All Room Status
- > Department administrator -Insight to all transactions within their department
 - o Create Department Roles and users within their department
 - Download Locked Docs within their department
 - View Docs within their department
 - View Recordings within their department
 - View Notary Journal within their department
 - View Audit History within their department
 - View Room Status within their department
- > Auditor Insight to all transactions globally
 - Create and complete their own transactions
 - Review their own transactions including recording, journal, and audit trail.
 - Download All Locked Docs within the enterprise
 - View All Docs within the enterprise
 - View All Recordings within the enterprise
 - View All Notary Journal within the enterprise
 - View All Audit History within the enterprise
 - View All Room Status within the enterprise
- > Department Auditor-Insight to all transactions within their department
 - Create and complete their own transactions
 - Review their own transactions including recording, journal, and audit trail.
 - Download Locked Docs within their department
 - View Docs within their department
 - View Recordings within their department
 - View Notary Journal within their department
 - View Audit History within their department
 - View Room Status within their department

- > Notary Account solely for completing notarizations
 - Create and complete transactions
 - Review transactions including recording, journal, and audit trail.