NotaryCam®

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 secure@notarycam.com to login any other time.

Sign in

Email *

Password *

☐ I agree to the eSign consent below and have read and accept the NotaryCam Terms of Service

Consumer Disclosure - Conducting business electronically, receiving electronic notices and disclosures, and signing documents electronically. Please read the following information. By proceeding

Sign In

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.
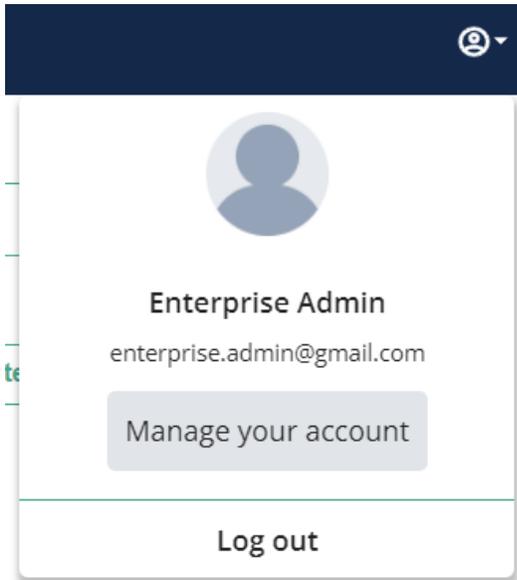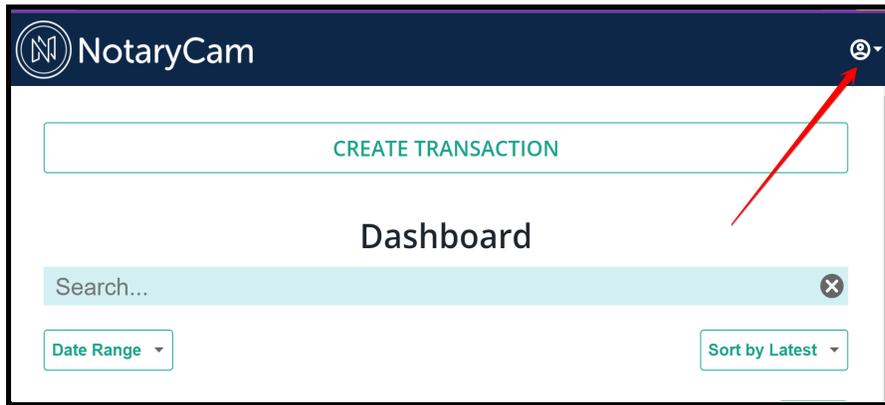
➢ Step 3: Once you click on the manage your account button, you will see the Notarycam Management System (NCM)
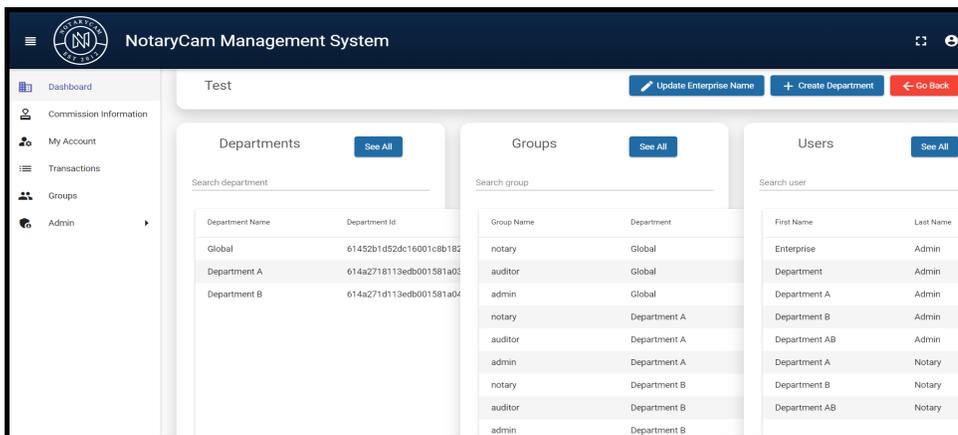
This screen allows all Enterprise administrators to add and create roles for other users. Only the Enterprise administrator will be able to see all of the different sections listed on the far left side under Dashboard. The available options for the Enterprise administrator to see and make changes to are as follows:
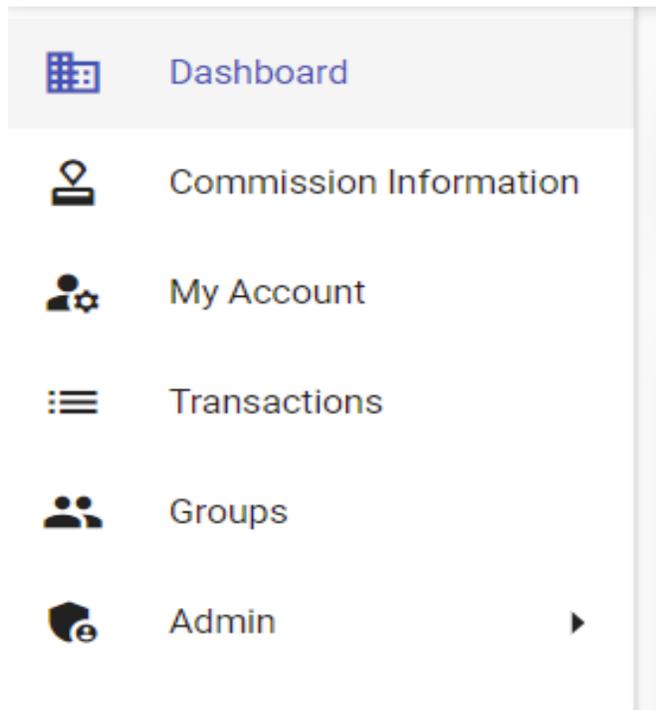
- ○ Commission Information
  - ■ This is where notaries house their licensing information, they are required to enter the below information before they can complete a transaction in the system
    - ● Commission County Name
    - ● E&O Expiration Date
    - ● Commision Expiration Date
    - ● E&O Amount
    - ● Commission Number Identifier
    - ● Bond Expiration Date
    - ● State Code
    - ● Bond Amount
    - ● Commission Seal
    - ● Identrust Certification in p12 format
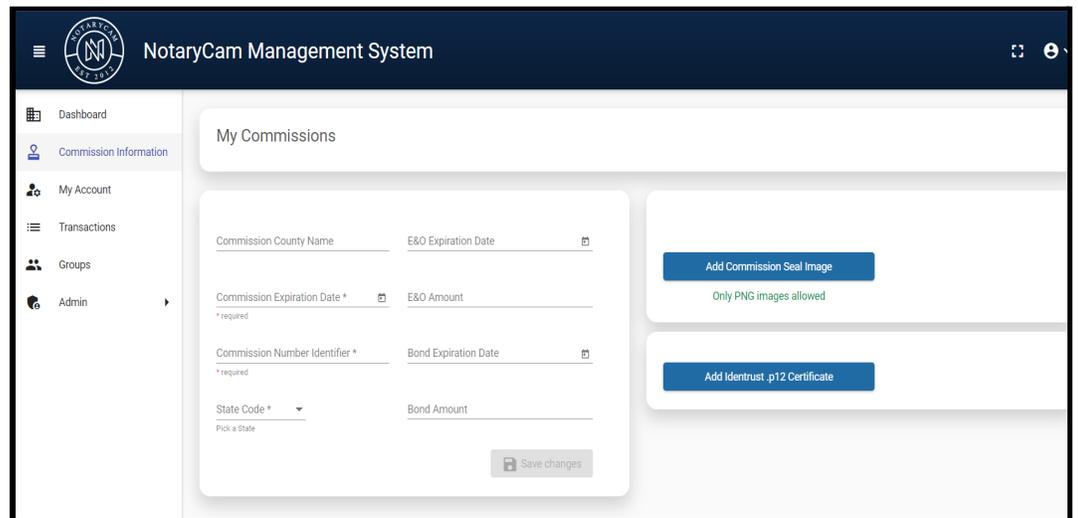
  - ■
- ○ My Account
  - ■ Below is the information that needs to be entered by each individual that is setup in the system.

- **Name**
- **Suffix**
- **First Name**
- **Middle Name**
- **Last Name**
- **Phone**
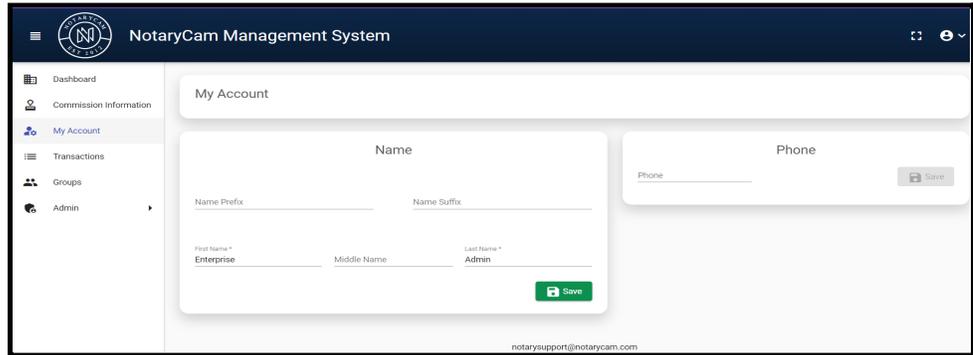
- ○ Transactions
  - ■ This area will show all transactions that have been created, the Enterprise administrator will be able to see all transactions within the system.
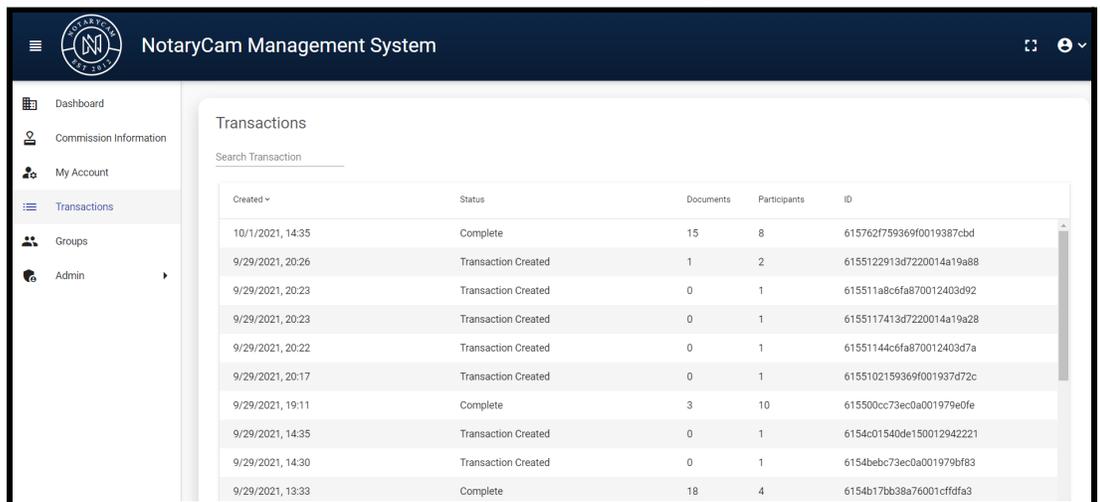
  - ■
- ○ Groups
  - ■ This section is where the Enterprise administrator can set up groups for their different categories like Global, Department A or Department B. The rows are listed out by name, department, users (total in that department) and ID. Roles that can be setup under the groups are listed below:
    - Department administrator
    - Auditor
    - Notary
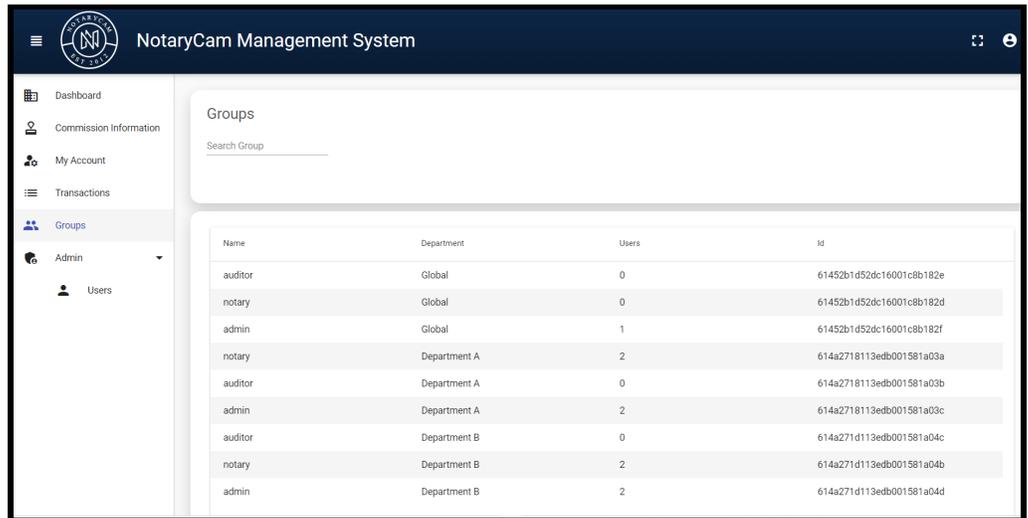
- ■
  - ○ Administrator
    - ■ Users - This section allows the users to filter by Notary, administrator , Auditor and None. The search allows for text to be entered to find the desired user along with the ability to create a user from scratch. The details for the users is listed below:
      - First Name
      - Last Name
      - Email Address
      - Group

    - ■
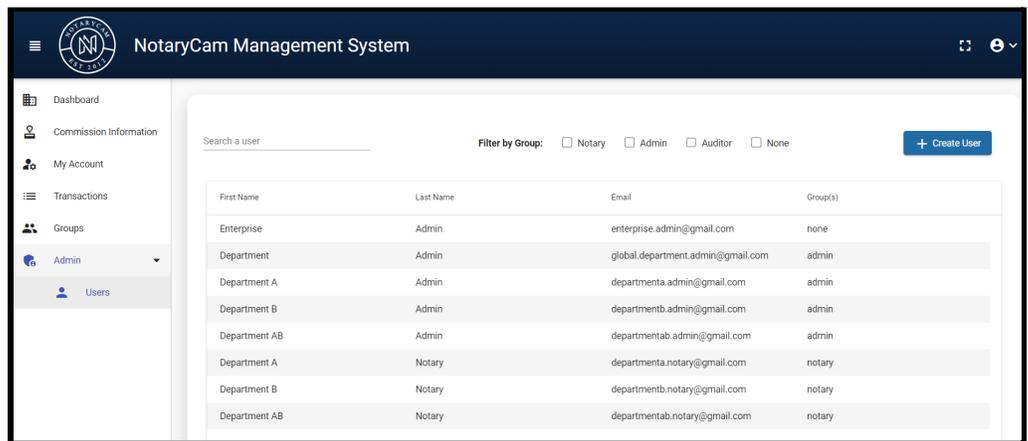
Enterprise administrator - How to create departments

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

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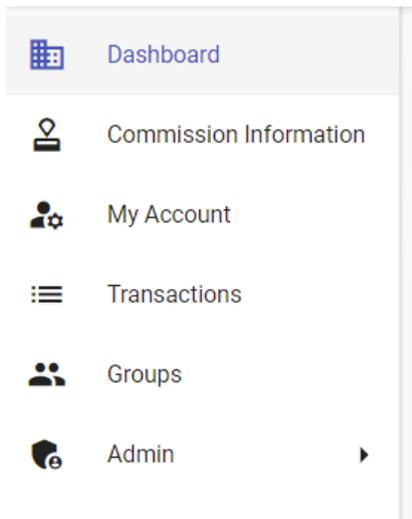
➢ Step 3: Navigate to the far left column labeled "Departments" and choose "See All"

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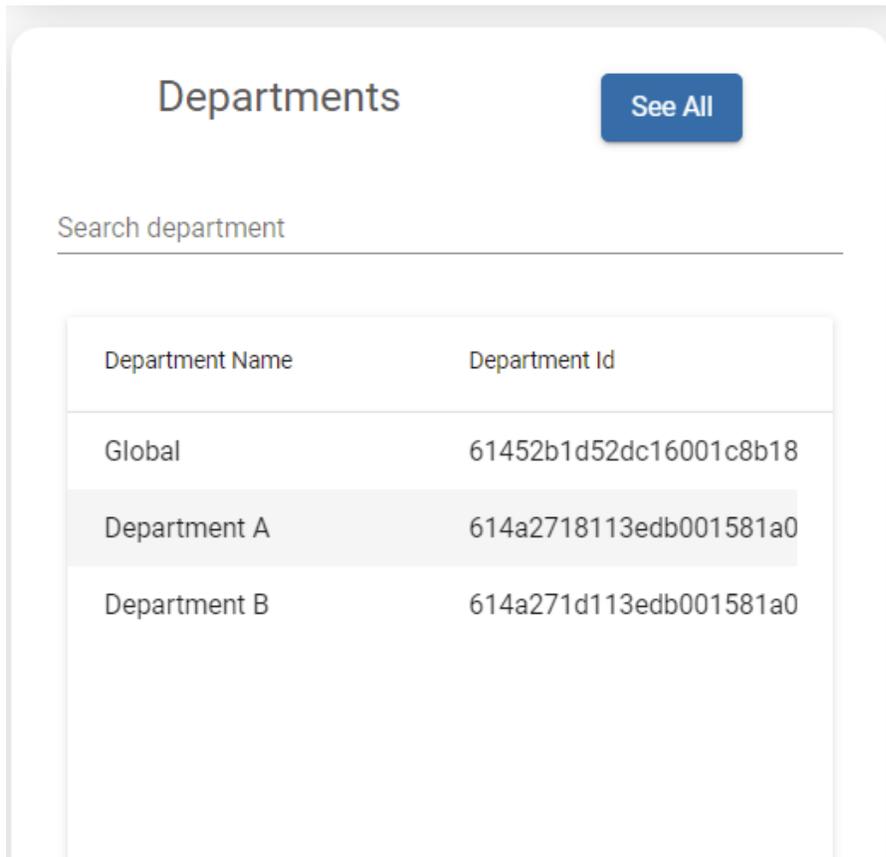
➢ Step 4: Click "Create Department" on the far right

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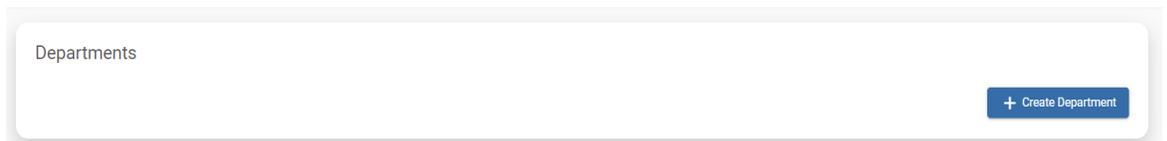
➢ Step 5: In put the department name and click Create New Department

Create Department

Department Name *
_____
* required

[Create New Department] [Cancel]

  ○
➢ Repeat steps 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

    ♟ Commission Information

    👤⚙ My Account

    ☰ Transactions

    👥 Groups

    🛡 Admin   ▶
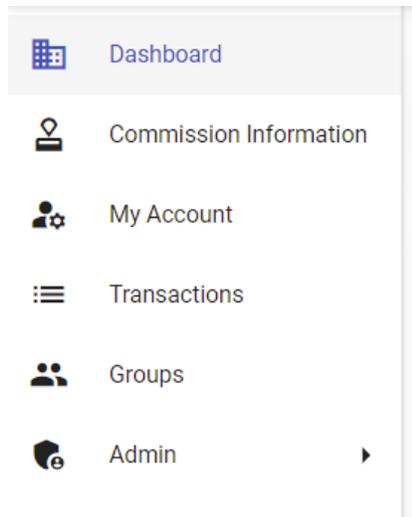
  ○
➢ Step 3: Navigate to the far right column labeled "Users" and choose "See All"

Users   [See All]

Search user
_____
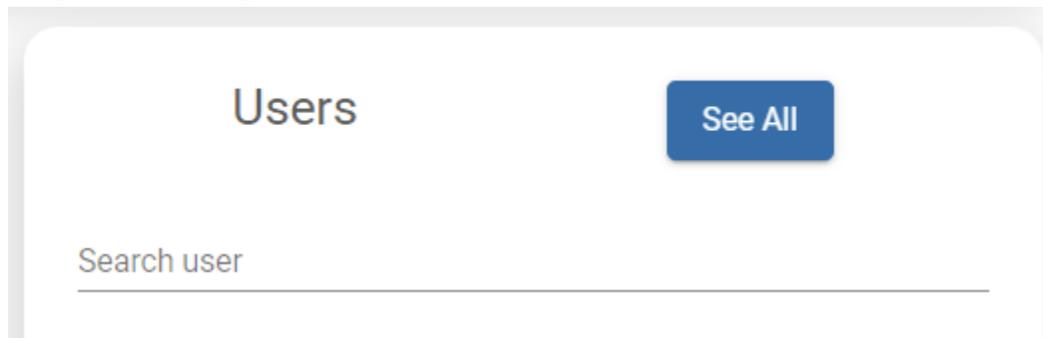
  ○
➢ Step 4: Click "Create User" on the far right

Search a user _____   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

○

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

○

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

○

➢ 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.

➢ 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

First Name ⌄	Last Name	Email	Id	Action
Department AB	Notary	departmentab.notary@gmail.com	614a6aac26465a2031af355f	⋮
Department A	Notary	departmenta.notary@gmail.com	614a6a7e26465a2031af355d	⋮

Users

Users Assigned To This Group

+ Assign Users

⊖ 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
  ○ 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.