Encompass SmartClient Installation and Login Instructions

This document describes the process for installing the Encompass SmartClient and then logging into the desktop version of Encompass. The Encompass Server application runs on a server and is accessed by users who are running the Encompass SmartClient application on their computers.

Validate Your System Requirements

Before installing the Encompass SmartClient, please check the latest system requirements.

SmartClient Installation

Before a user can log into Encompass for the first time, the Encompass SmartClient components must be installed.
This is a one-time-only procedure performed by a user logged on to the computer using a Microsoft ® Windows account with "admin" privileges (i.e., the user who logs into Encompass with the *admin* user ID).

To Install SmartClient:

1 Log in to the computer using a Windows account with *admin* privileges (i.e., log into Encompass using the *admin* user ID).

2 Click the following link to start the installation process.

https://www.elliemae.com/getencompass360

3 On the File Download - Security Warning window, click **Run**.
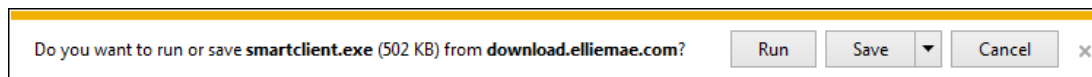
4 When prompted, click **Install** to confirm that you want to install the items required for the Encompass SmartClient.
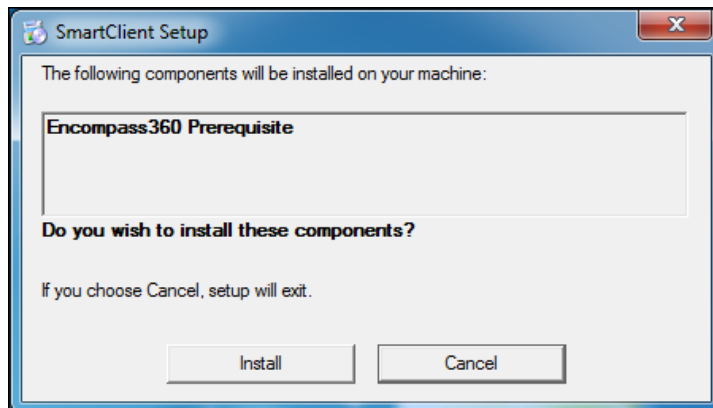
The application files are downloaded, and then the Installation Manager is loaded.
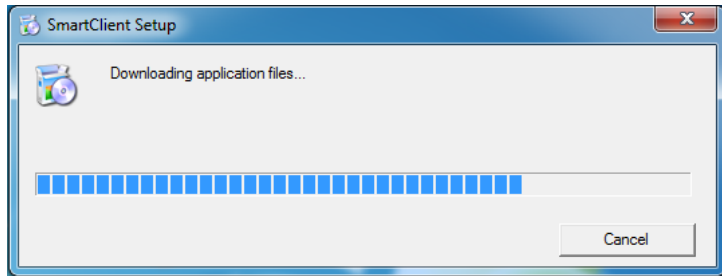
5 If the Internet Explorer - Security Warning window displays, click **Run**. The Windows Installer displays a **Preparing to install** message and then the Encompass Installation Manager is loaded.
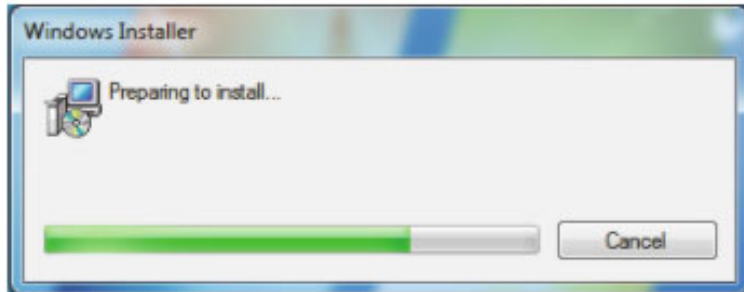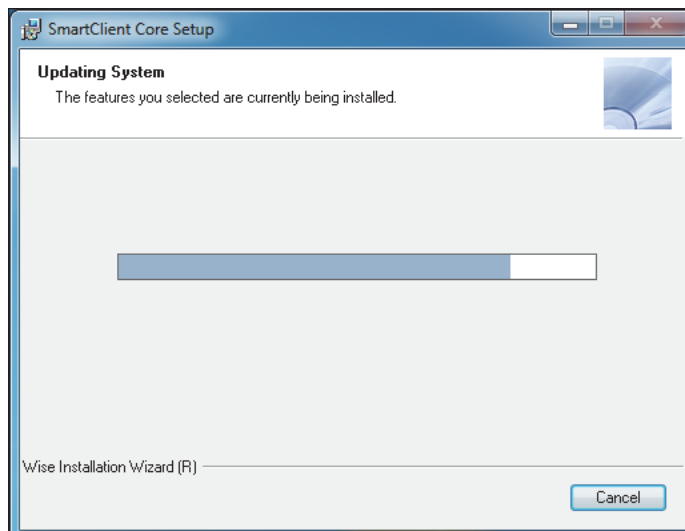

The Encompass Installation Manager installs each required application and displays the progress of the installation.
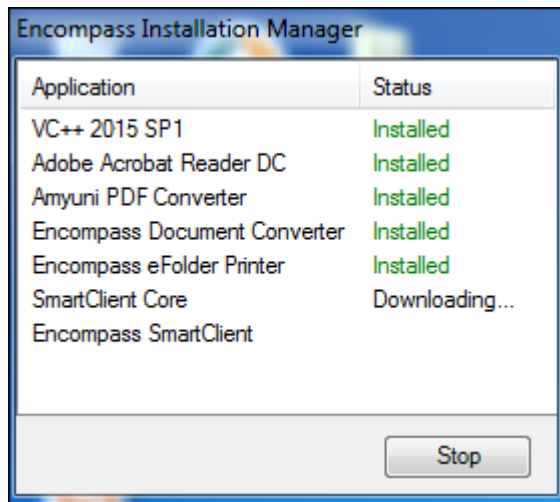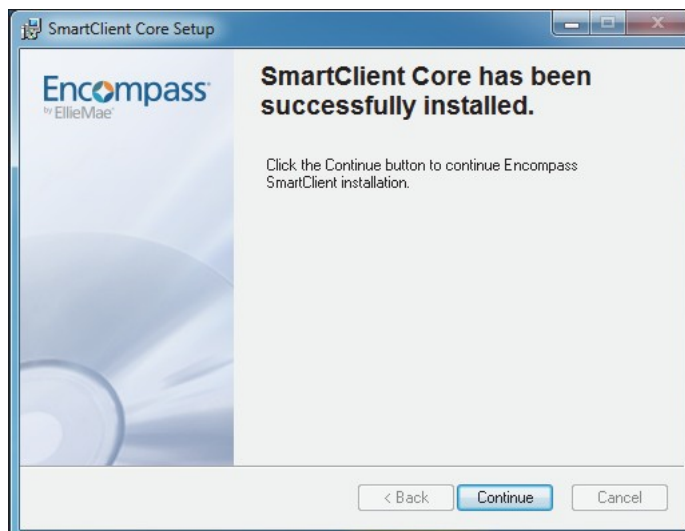
6 When the SmartClient Core Installation wizard opens, click **Next**.

7 The Updating System window shows the progress of the installation.

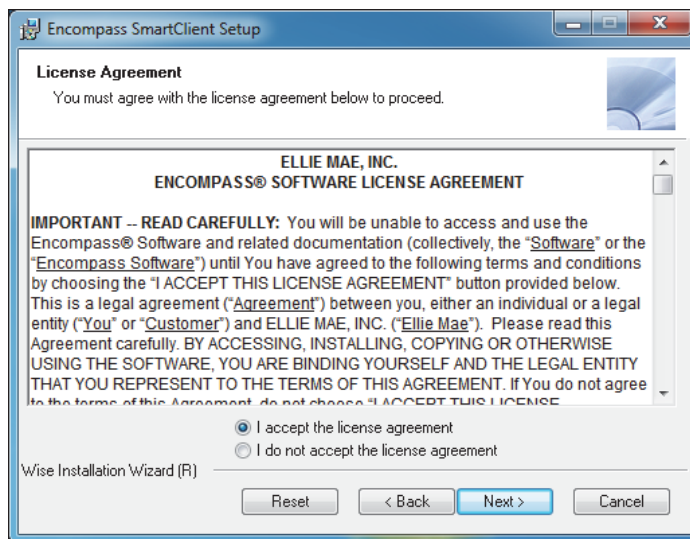**8** When the installation of the SmartClient Core is complete, click **Continue**.

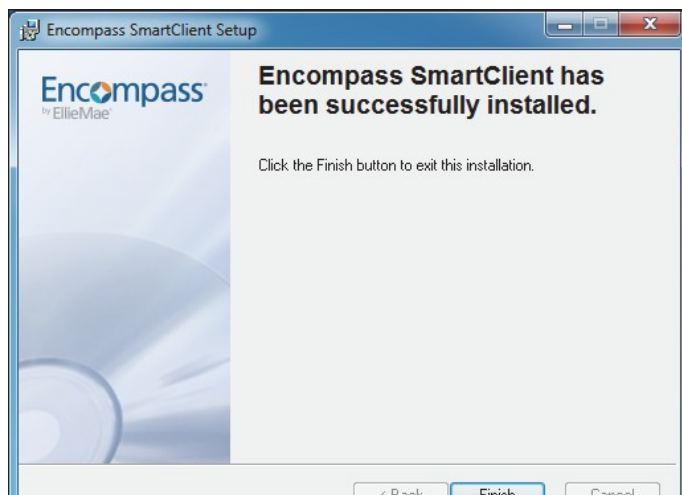**9** When the Encompass SmartClient Installation wizard opens, click **Next**.

10 On the License Agreement window, click **I accept the license agreement**, and then click **Next**.

11 When the installation is complete, click **Finish**.

The SmartClient Installation Wizard and the Installation Manager will automatically close.
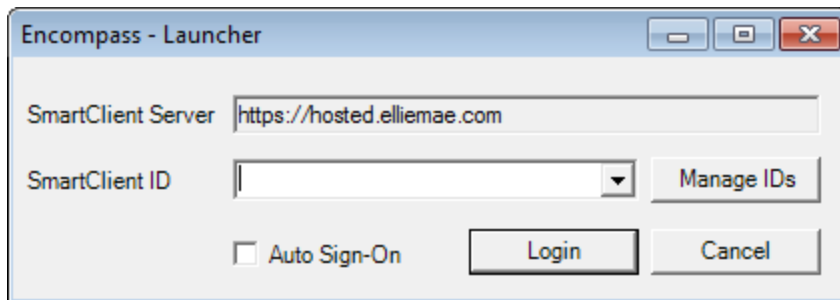
Log In to Encompass

The first time you log in to Encompass, the Encompass - Launcher opens. For all following logins, you will be taken directly to the Encompass Log In window where you will enter your Encompass User ID and Password. Contact your system administrator if you do not already have this information.

IMPORTANT: Before logging in for the first time, make sure your Encompass administrator has provided you with the Instance ID that is required for this procedure.

1 Double-click the **Encompass** icon on your desktop.

2 On the Encompass - Launcher, enter the **SmartClient ID** provided by your system administrator.

3 The **Auto Sign-On** check box is selected by default.

    • If the check box is selected, the Encompass - Launcher will not display on future logins.

    • If the check box is cleared, the Encompass - Launcher will display each time you log in.

    *NOTE:If you need to log on to different Encompass environments, for example test and production environments, use the **Manage IDs** button to add, delete, or reorder the SmartClient IDs for the different Encompass environments that are available for selection from the drop-down list. Make sure you clear the **Auto Sign-On** check box so that the launcher displays each time you log on, allowing you to select the SmartClient ID for the appropriate environment.*

4 Click **Login**.

Your Encompass administrator has the option of setting up different Single Sign-On options for Encompass users: Restricted Access and Full Access.

Logging in with Restricted Access:

Users with Restricted Access must log in using their company's chosen Identity Provider service (IdP) credentials.

1 On the Encompass Log In screen, enter your Instance ID, and then click **Next**.

    • The Instance ID is your Encompass SmartClient ID, which is provided by your Encompass administrator. (It is not the Client ID found under Help > About Encompass in Encompass). Example SmartClient ID: BE111XXXXX.

    • After providing your Instance ID and successfully logging in once, this ID will be cached and automatically provided each time the user logs in moving forward.

2 Click the **Login via Single Sign On (SSO)** button to go to your IdP log in screen.

3 On your IdP log in screen, enter the required credentials provided by your company, and then click **Sign In**.

    • Identity provider credentials must be supplied to the user by the Encompass administrator since your company is managing the relationship with the Identity provider.

    • After you have entered valid IdP credentials, you are logged into Encompass.

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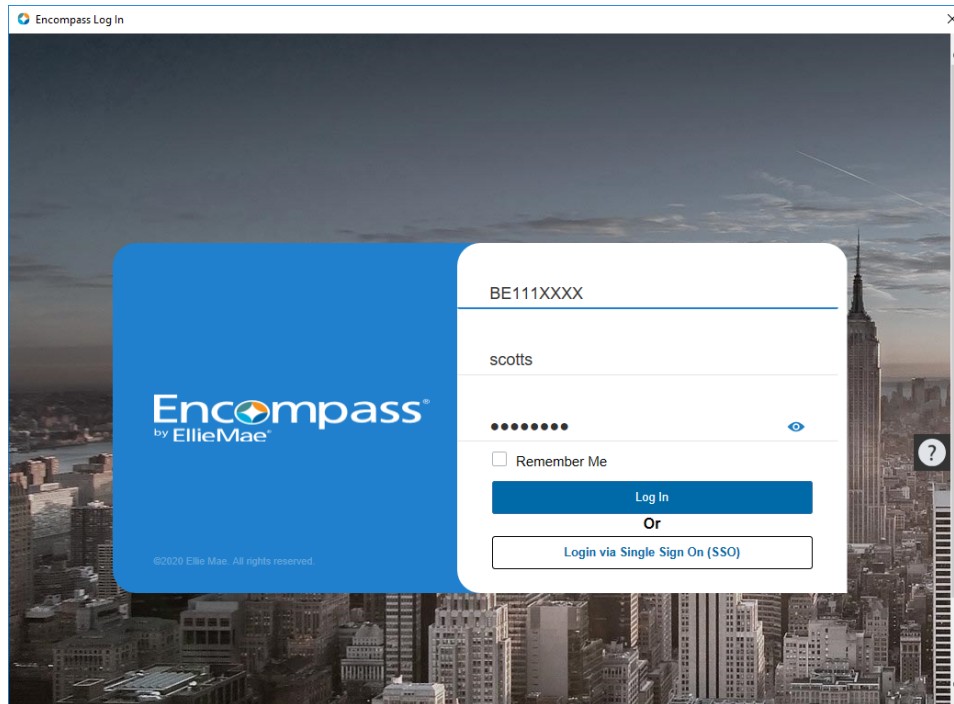
Logging in with Full Access

Users with Full Access can log in using their IdP credentials or their Encompass user name and password.

1   On the Encompass Log In screen, enter your **Instance ID**.

   • The Instance ID is your Encompass SmartClient ID, which is provided by your Encompass administrator. (It is not the Client ID found under Help > About Encompass in Encompass). Example SmartClient ID: BE111XXXXX.

   • After providing your Instance ID and successfully logging in once, this ID will be cached and automatically provided each time the user logs in moving forward.

2   To log in using your Encompass credentials, enter your Encompass user ID and password in the fields provided, and then click the **Log In** button.

OR

1   Click the **Login via Single Sign On (SSO)** button to go to your IdP log in screen.

2   On your IdP log in screen, enter the required credentials provided by your company, and then click **Sign In**.

NOTE: Identity provider credentials must be supplied to the user by the Encompass administrator since your company is managing the relationship with the Identity provider.

Refer to the *Setting Up SSO in Encompass* guide for more information about single sign-on options for Encompass.

How to Get Up and Running with Encompass

To quickly learn about Encompass, take advantage of the **Ellie Mae Resource Center** and all it has to offer. You can access the Resource Center at: https://resourcecenter.elliemae.com/resourcecenter/. You will be asked to log in with your Encompass client ID, user ID, and password. You can also connect directly from the Encompass software via your Encompass Home Page.

The Knowledge Base, Encompass Help site, and online videos are available 24x7 in Encompass and via the Resource Center. To take a tour of these resources you can view the Getting Help with Encompass tutorial.

The Compliance Center is your resource for information related to regulatory and GSE policy changes that affects Encompass and related products. The Compliance Center can be found in the Resource Center.

Your Encompass System Administrator will designate named key contacts within your organization that will have the ability to contact Technical Support. Instructions on designating your organization's named key contacts have been provided to your Encompass System Administrator.

Getting Help with Encompass

Many resources are available to help you learn and use Encompass. All can be easily accessed from the Encompass Help menu after you have logged in to Encompass.

The Encompass Help Menu

The Help menu at the top of your Encompass window contains options that take you directly to the information you need. Each option is described below.

- **Encompass Help**

  The online help system provides comprehensive Encompass information, including detailed descriptions of features and tools, step-by-step instructions, and tutorial videos. You can also open the online help by pressing the **F1** key.

- **Videos**

  The Tutorials menu contains a selection of video tutorials that teach you to use Encompass features such as the Pipeline, eFolder, and Dashboard.

- **Glossary**

  The Glossary contains definitions of the terminology and features used in Encompass.

- **Guides & Documents**

  The Guides & Documents menu contains the latest versions of Encompass documentation, including user guides, release notes, quick reference guides, white papers, and tutorials.

- **Encompass Training**

  The Training website contains detailed information on the programs and options available to help you learn Encompass. You can watch video tutorials, sign up for online classes, and learn about onsite and custom class offerings.

- **Technical Support Options**

  The Technical Support website contains a searchable database of how-to articles and problem solutions, as well as a user forum, and options for contacting our support team.

- **Release Notes**

  The Release Notes page includes links to both current and past release notes.