

Encompass Anywhere User Supplement

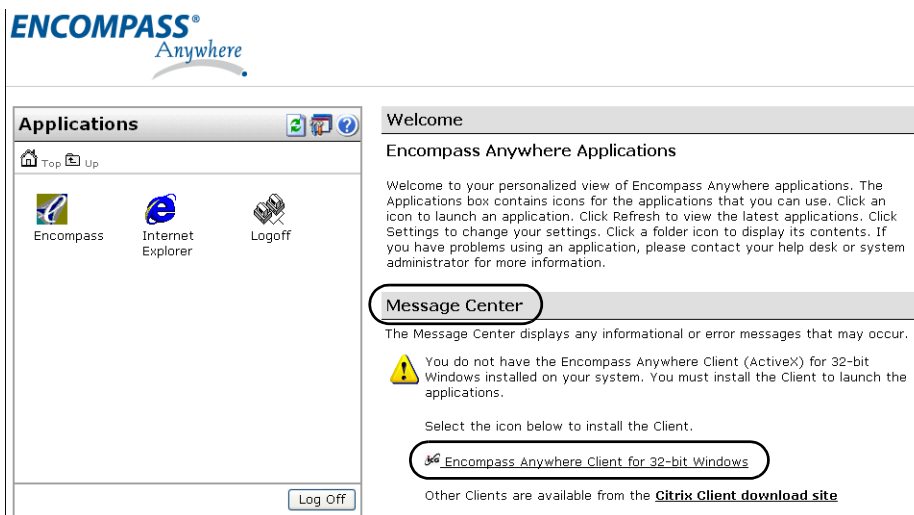
The purpose of this document is to supplement the Encompass online help and guides with information that is specific to the use of Encompass Anywhere. The following topics are addressed:

- Initial setup - page 1
- Logging in to Encompass Anywhere - page 3
- Importing contacts, loan files, and settings - page 5
- Exporting contacts - page 9
- Exporting to Fannie Mae format - page 9

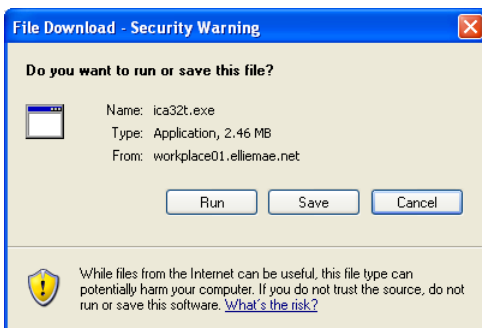
Initial Setup

Before you log in to Encompass Anywhere for the first time, you must install the *Encompass Anywhere Client for 32-bit Windows*. This is a one-time procedure.

- 1 Open your Web browser and enter the following address to open the Encompass Anywhere Applications page:
<http://www.GoToEncompass.com>



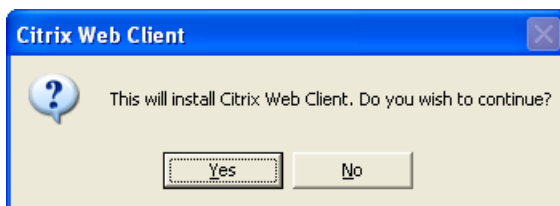
- 2 In the Message Center, click the **Encompass Anywhere Client for 32-bit Windows** link to begin.



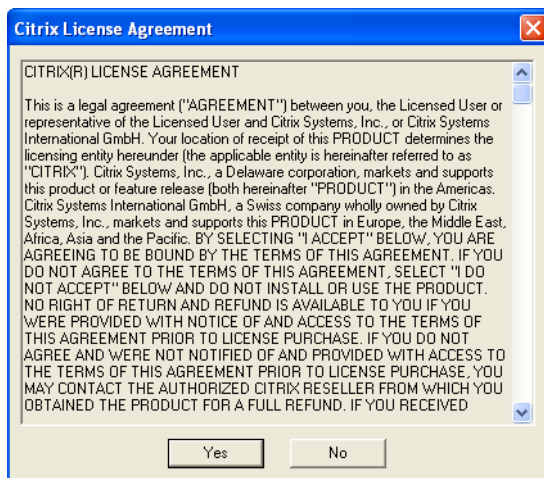
- 3 On the File Download - Security Warning window, click **Run**.



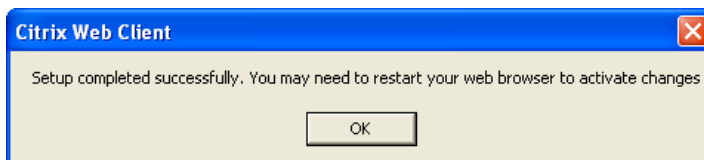
- 4 On the Internet Explorer - Security Warning window, click **Run**.



- 5 Click **Yes** to install the Citrix Web Client.



- 6 Read the Citrix License Agreement and then, if you accept the agreement, click **Yes** to continue.

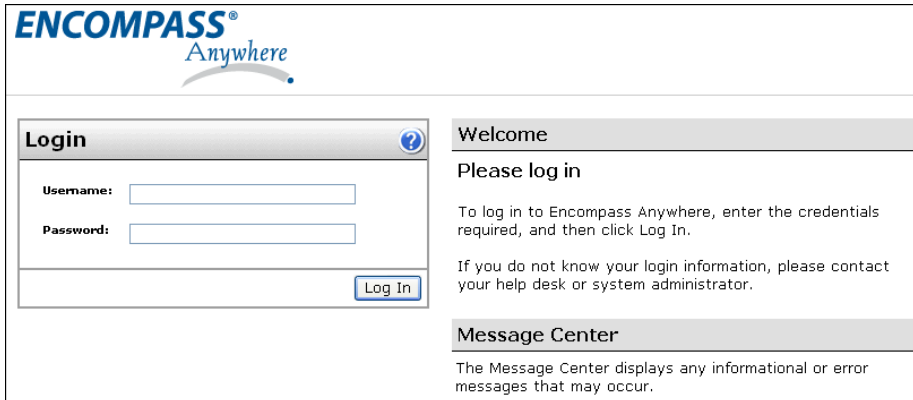


- 7 Click **OK** in response the completion message.
- 8 Close your Web browser.

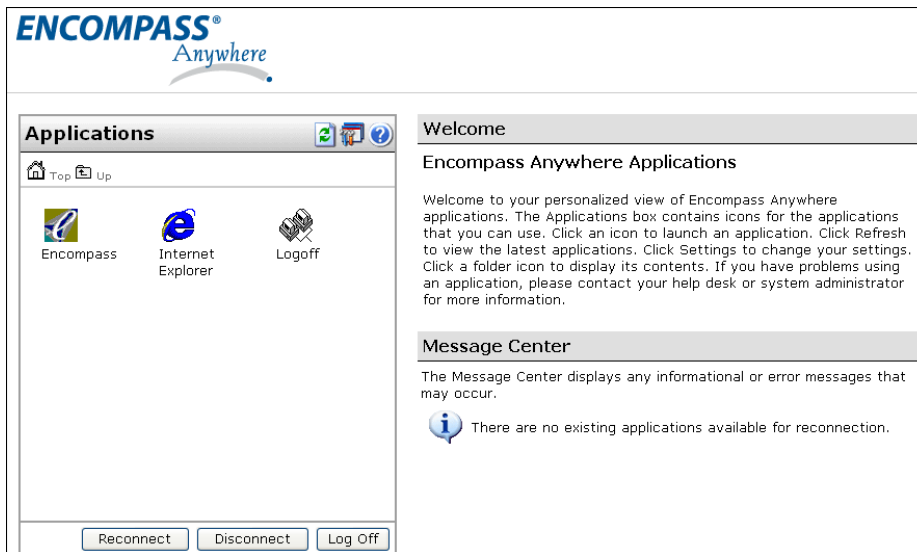
Logging in to Encompass Anywhere

Before you can log in to Encompass Anywhere, you must have a Username and Password. Contact your system administrator to obtain this information.

- 1 Open your Web browser and then enter the following address to open the Encompass Anywhere Login page:
http://www.GoToEncompass.com



- 2 On the Login page, enter your assigned **Username** and **Password**, and then click the **Log In** button.



- 3 On the Applications page, click the **Encompass** icon.

NOTE: If you receive the error message "ICA file not found", complete the following steps, and then click the Encompass icon again. If the problem is not resolved, contact Ellie Mae Customer Support.

- On the Internet Explorer menu bar, click **Tools** and then select **Internet Options**.
- Click the **Advanced** tab. In the **Security** section, clear the **Do not save encrypted pages to disk** check box.
- Click the **General** tab. Click the **Delete Files** button, and then click **OK** on the Delete Files message box.
- When the deletion of temporary Internet files is complete, click **OK** to close the Internet Options window.



- 4 On the User Login window, enter the Encompass **User Name**, **Password**, and **Server** provided by your Encompass system administrator, and then click **OK**.

NOTE: Your User Name and Password may or may not be the same as your Encompass Anywhere Username and Password.

Using Encompass

Once you are logged in to Encompass, the online help provides overviews and detailed instructions for using Encompass. To access the online help, click the **Help** button in the upper-right corner of any Encompass screen.

There are some procedures that are different when you use Encompass Anywhere. These procedures are described in the remainder of this document with references to the complete procedure in the online help.

Session Disconnect and Log Off

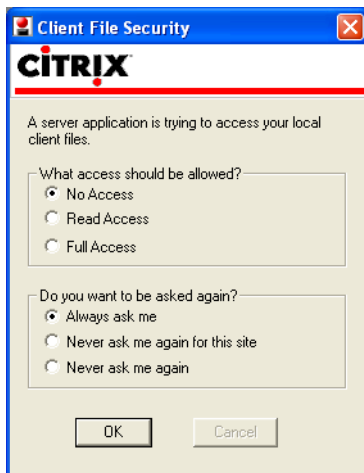
Your Encompass Anywhere session is set to automatically disconnect if it is idle for 30 minutes. If you reconnect within 30 minutes of the when the session was disconnected, you can resume working without any loss of data. If you do not reconnect within 30 minutes, the session is logged off and all unsaved data is lost.

To prevent unintended loss of data, make sure to regularly save your work.

Importing Contacts, Loan Files, and Settings

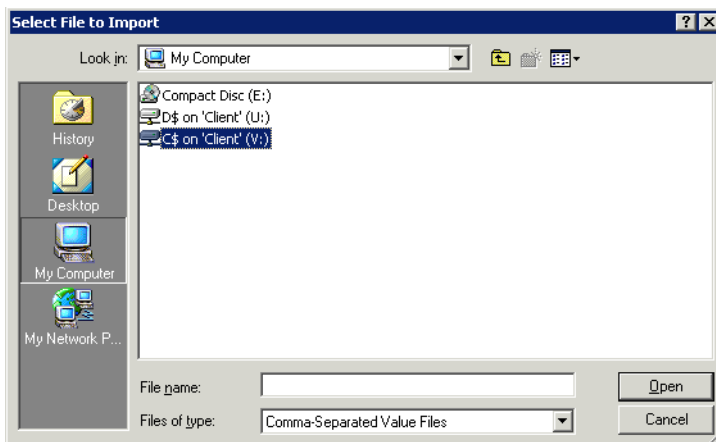
When you import contacts, loan files, and settings into Encompass from your computer, you will use a slightly different procedure to select the location of the files than that which is detailed in the Encompass online help.

- At the point in the import procedure that you are asked to browse to the location of the file(s), you will need to navigate to the drive called **C\$ on 'Client' (V:)**, and then locate the specific file(s) within that drive.
- When you are navigating to the C\$ on 'Client' (V:) drive, the Client File Security window may open. Select **Full Access** and **Never ask me again**, and then click **OK**.



Importing Contacts

When you import contacts, use the same procedure as described in the online help topic, "Import a Contact - From a CSV File." Navigate to the **C\$ on 'Client' (V:)** drive to locate the CSV file to import as shown below.



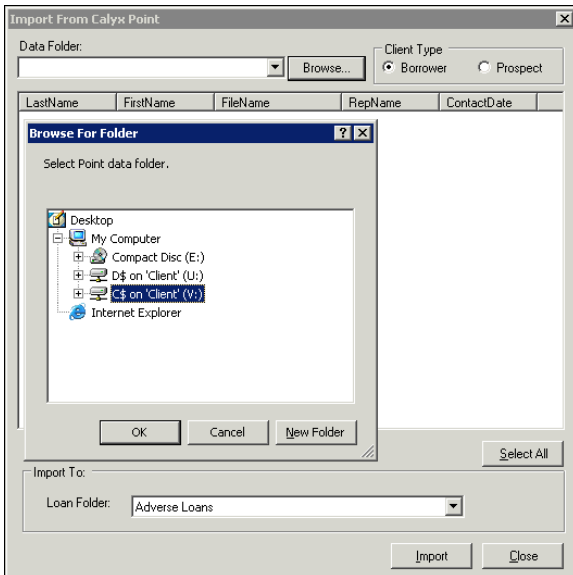
NOTE: You can only import contacts that have been saved to a Comma-Separated Values (CSV) file. To import contacts from Microsoft® Outlook®, you must first export the contacts from Outlook to a CSV file.

Importing Loan Files

When you import loan files, use the same procedure as described in the online help topic, "Import Loan Files." Navigate to the **C\$** on '**Client**' (**V:**) drive to locate the file(s) to import as shown below.

NOTE: To import loan files from Genesis 2000[®], contact Ellie Mae Customer Support.

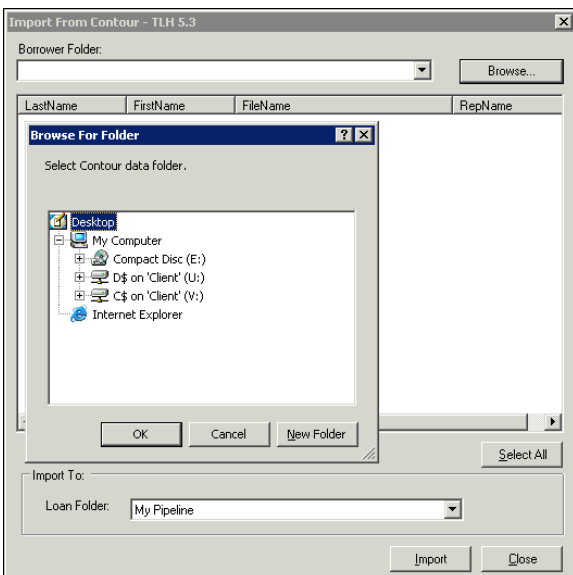
Calyx[®] Point[®] Files



After you select **C\$** on '**Client**' (**V:**), the default paths for the location of the loan files is:

- V:\PNTDATA\BORROWER

Contour TLH[®] Files



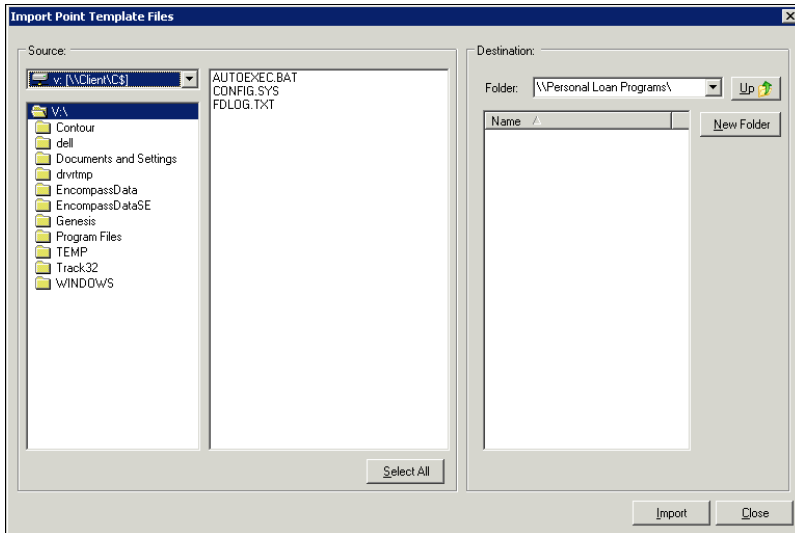
After you select **C\$** on '**Client**' (**V:**), the default paths for the location of the loan files is:

- V:\Contour\Loans\Samples

Importing Calyx Point Programs and Settings

When you import Calyx Point Programs and Settings, use the same procedure as described in the online help topic, "Import Calyx Point Data." Navigate to the **C\$** on '**Client**' (**V:**) drive to locate the file(s) to import as shown below.

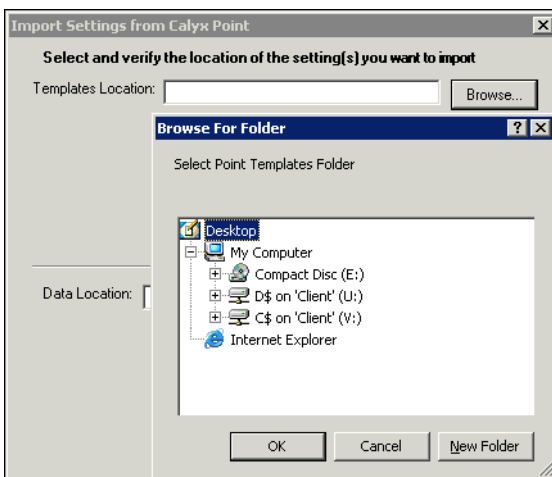
Calyx[®] Point[®] Programs and Templates



After you select **C\$** on '**Client**' (**V:**), the default paths for the location of the programs and closing costs are as follows:

- **Loan Programs:** V:\PNTEMPL\LOANPROG
- **Closing Costs:** V:\PNTEMPL\CCS

Calyx[®] Point[®] Settings

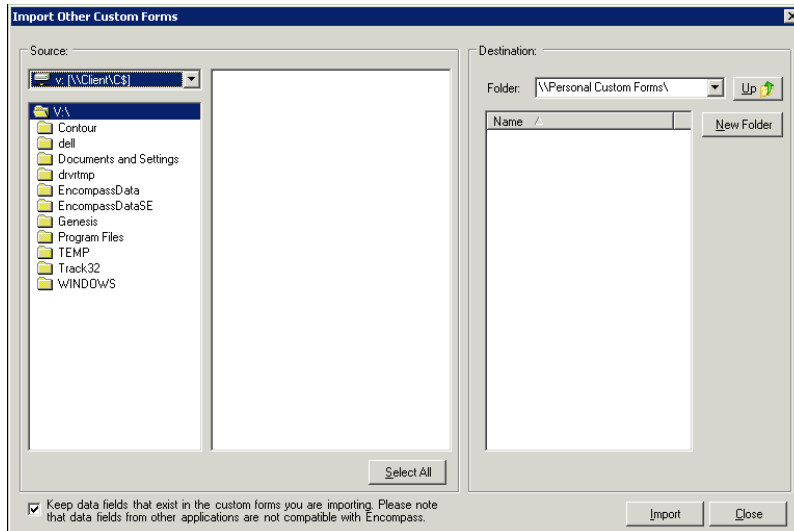


After you select **C\$** on '**Client**' (**V:**), the default paths for the location of the settings are as follows:

- **V:\PNTEMPL** and **V:\PNNTDATA**

Importing Custom Forms

When you import custom forms from Calyx or another location, use the same procedure as described in the online help topic, "Import a Custom Form." Navigate to the **C\$** on **'Client' (V:)** drive to locate the form(s) to import as shown below.

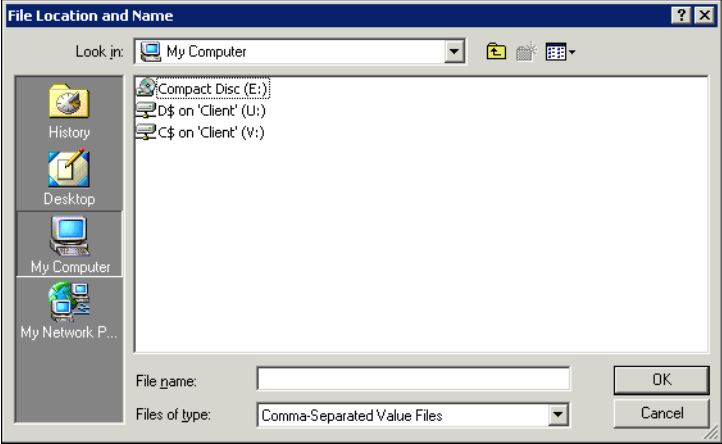


After you select **C\$** on **'Client' (V:)**, the location of the non-Calyx custom forms is dependant on where you have stored them. The default path for the location of Calyx custom forms is:

- V:\PNTEMPL\CUSTOMDOC

Exporting Contacts

When you export contacts, use the same procedure as described in the online help topic, "Export a Contact." Navigate to the **C\$ on 'Client' (V:)** drive to save the new CSV file as shown below.



Exporting to Fannie Mae Format

When you export a loan file to Fannie Mae format, use the same procedure as described in the online help topic, "Export a Loan File to Fannie Mae DU Format." When the Save as window opens, navigate to the **C\$ on 'Client' (V:)** drive to save the file as shown below.

