

# Encompass SmartClient Installation and Login Instructions

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

## SmartClient Installation

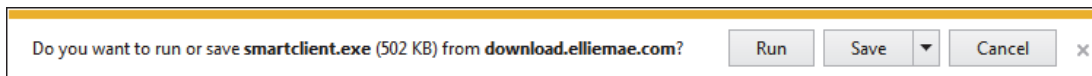
Before a user can log in to Encompass for the first time, the Encompass SmartClient components must be installed. This is a one-time-only procedure performed by a user logged on to the computer using a Microsoft® Windows account with “admin” privileges.

### Installation

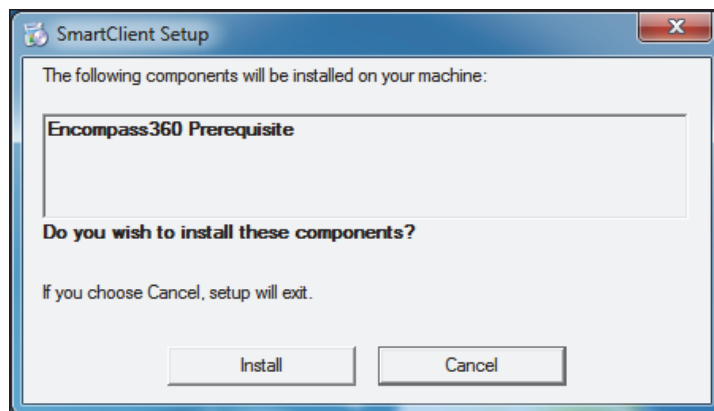
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#### To Install SmartClient:

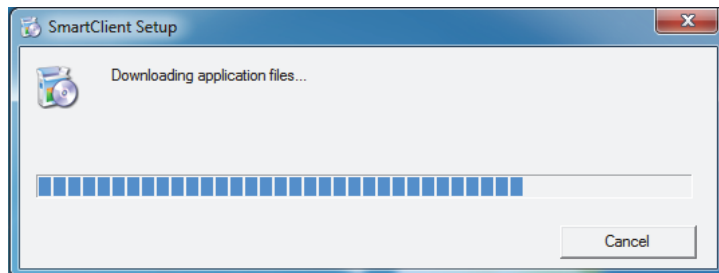
- 1 Log in to the computer using a Windows account with **admin** privileges.
- 2 Click the following link to start the installation process.  
<http://www.elliemae.com/getencompass360>
- 3 On the File Download - Security Warning window, click **Run**.



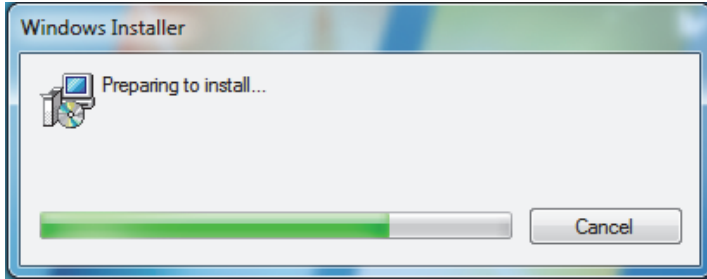
- 4 When prompted, click **Install** to confirm that you want to install the items required for the Encompass SmartClient.



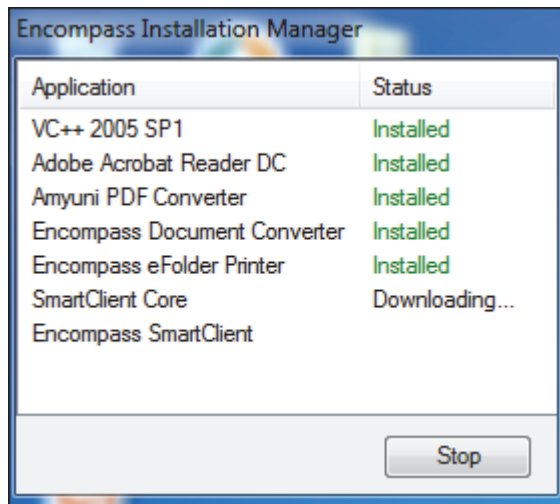
The application files are downloaded, and then the Installation Manager is loaded.



- 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.



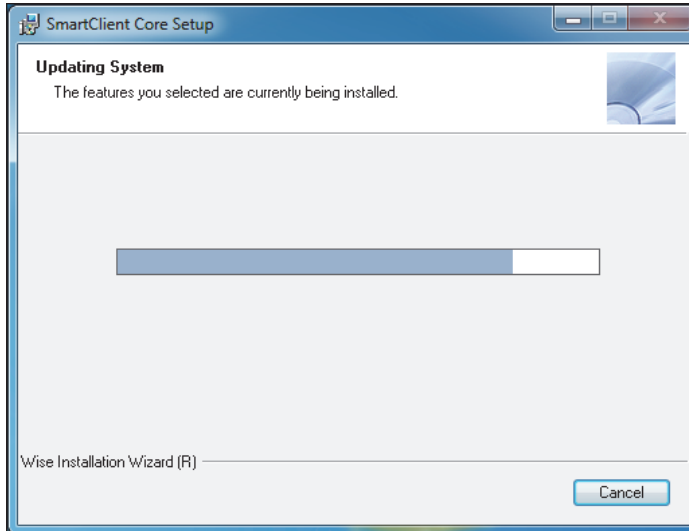
The Encompass Installation Manager installs each required application and displays the progress of the installation.



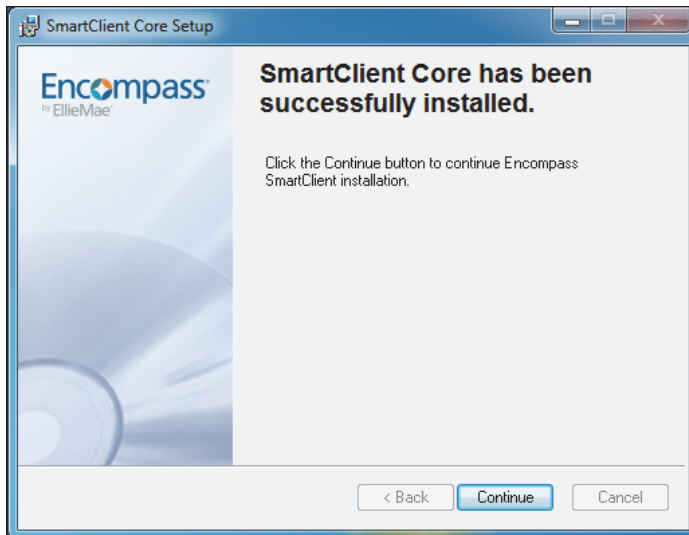
- 6 When the SmartClient Core Installation wizard opens, click **Next**.



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



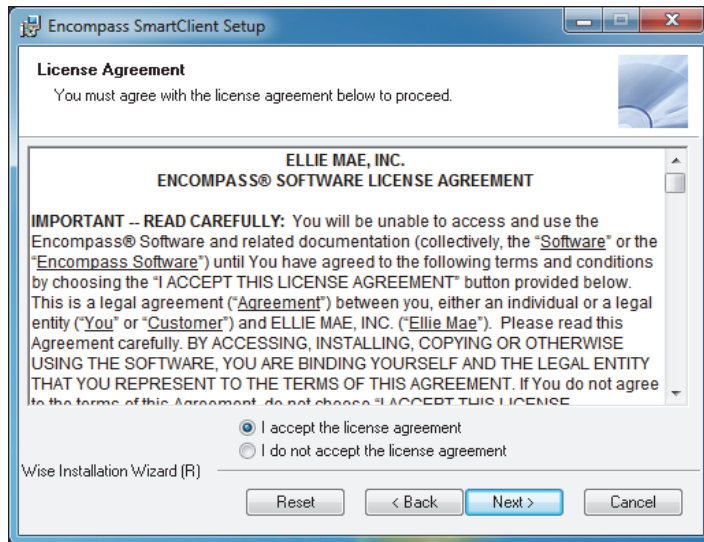
8 When the installation of the SmartClient Core is complete, click **Continue**.



9 When the Encompass360 SmartClient Installation wizard opens, click **Next**.

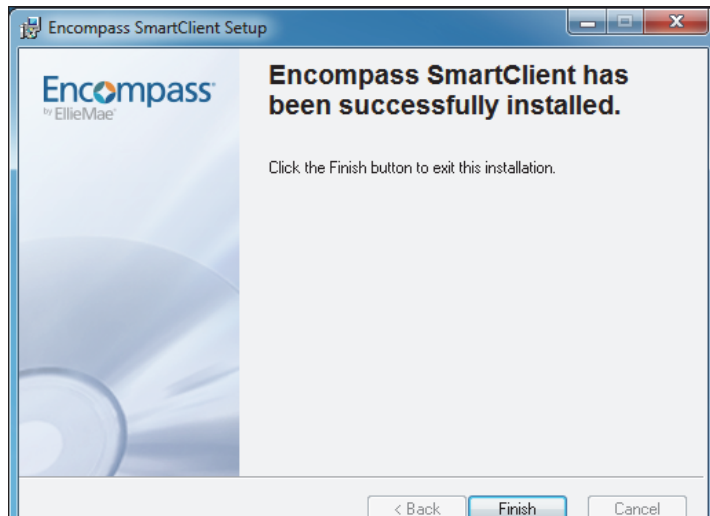


10 On the License Agreement window, click **I accept the license agreement**, and then click **Next**.



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


The SmartClient Installation Wizard and the Installation Manager will automatically close.



## Log In to Encompass

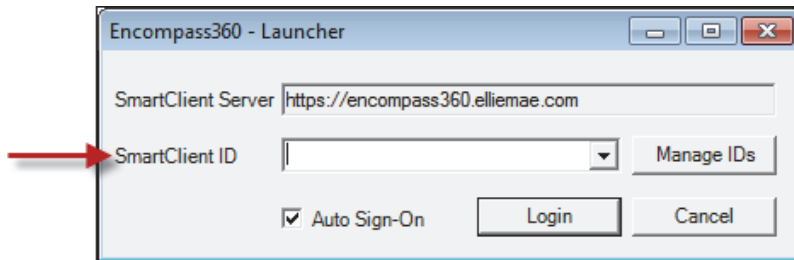
The first time you log in to Encompass, the Encompass - Launcher opens. For all following logins, you will be taken directly to the Encompass Log In window where you will enter your Encompass User ID and Password. Contact your system administrator if you do not already have this information.

**IMPORTANT:** Before logging in for the first time, make sure your Encompass administrator has provided you with the SmartClient 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**.



- 5 On the Encompass Log In window, enter your Encompass **User ID** and **Password**, and then click **OK**. The **Networked** Connection option will be selected by default and the Server information will already be populated.



# 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.

- **Tutorials**

The Tutorial 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.

- **Documentation Library**

The Documentation Library contains the latest versions of Encompass documentation, including user guides, release notes, quick reference guides, white papers, and tutorials.

- **Training Schedule**

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.