

Updating to Encompass Custom and Banker Editions, Versions 3.0 or Later

This document contains preparation and installation guidelines for updating to Encompass Custom Edition and Banker Edition, versions 3.0 or later.

Note: *A high-speed Internet connection is strongly recommended when downloading Encompass updates.*

System Requirements

Server

- Computer - 3GHZ Dual Pentium 4 or Xeon Processor
- RAM - 2 GB
- Network Port - 1 GB
- Hard Drive Space - 1.5 GB of free space to accommodate Encompass and third-party applications
- Additional hard disk space for data
- MS SQL Server 2000 or 2005 Express
- Windows Operating System - 2000 Service Pack 4, XP, 2003 Server, or Vista

Client

- Computer - 2 GHZ Processor
- Monitor Resolution - 800 x 600 or greater
- RAM - 1 GB
- Hard Drive Space - 700 MB of free space to accommodate Encompass and the third-party applications
- Windows Operating System - 2000 Service Pack 4, XP, 2003 Server, or Vista

Third-party Applications

The third-party applications are installed during the update if the required version is not on your computer.

- Microsoft Internet Explorer - 6.0+
- Microsoft .NET framework 2.0
- Microsoft Visual J# 2.0
- Microsoft Office 2000 or newer

Notifying Your Users

Before the server update begins, all client users must be logged out of Encompass. The update program will do this automatically, but any unsaved data will be lost. It is advisable to notify your users well in advance of beginning the update, so they have time to save their data and log out of Encompass.

Encompass provides tools to notify users of impending updates, log users out of Encompass, and prevent users from logging in during updates. Some recommendations are provided below.

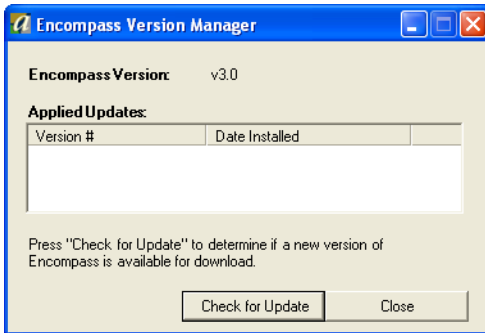
- **Notice to All Users** – Use the All User Information tool to send an email to all Encompass users in advance of the scheduled update. (From the Encompass Settings tab, select **System Administration** and then **All User Information**).
- **Disable Logins** – Before starting the update, use the Current Logins tool to stop users from logging in. (From the Encompass Settings tab, select **System Administration** and then **Current Logins**).
- **Notice to Logged In Users** – Send an email or broadcast message to logged-in users just prior to starting the update. Instruct users to save their work and log out of Encompass.
- **Log Users Out of Encompass** – Before starting the update, use the Current Logins tool to log any remaining users out of Encompass. Each user receives a message informing them that they have been logged out.

Installing the Update

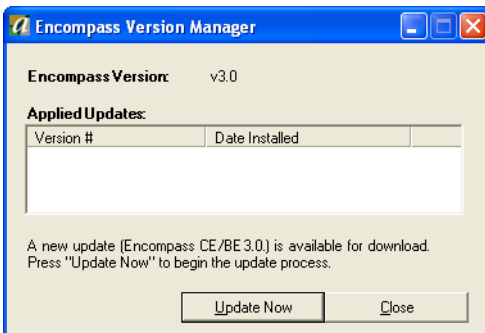
Use the Version Update Manager in the Encompass Admin Tools to update your server. When your users log on to client machines after the server is updated, they will be prompted to install the update.

Server Installation

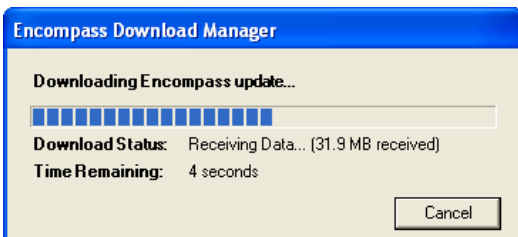
- 1 Click **Start**, point to **All Programs**, point to **Ellie Mae Encompass**, and then click **Admin Tools**.
- 2 Click the **Version Update** tool.



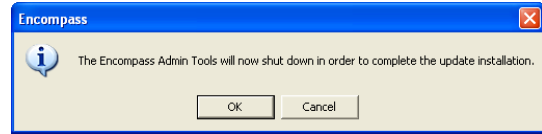
- 3 On the Encompass Version Manager window, click **Check for Update**.



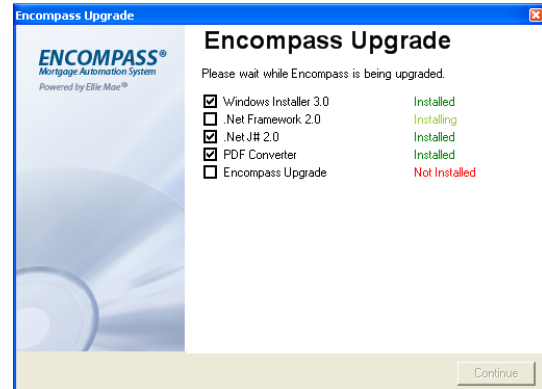
- 4 When a message is returned indicating that an update is available, click **Update Now**.



The Encompass Download Manager shows the progress of the download.



- 5 When the download is complete, click **OK** to close the Admin Tools and continue the installation.



If the installation program determines that any of the third-party applications need to be updated, the Encompass Upgrade window opens. The window will remain open and track the progress of the installation.

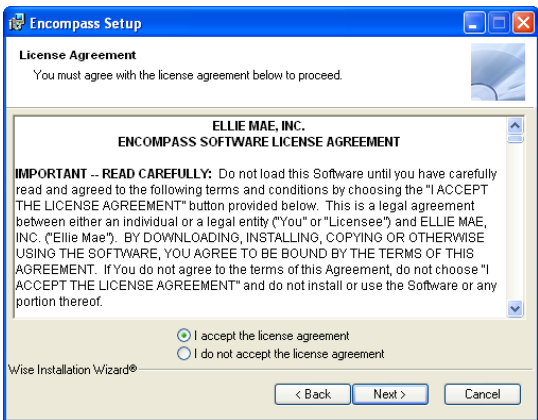
The required third-party applications will be installed prior to starting the Encompass update process.

If only Encompass needs to be updated, the installation program moves directly to the Encompass Installation Wizard.

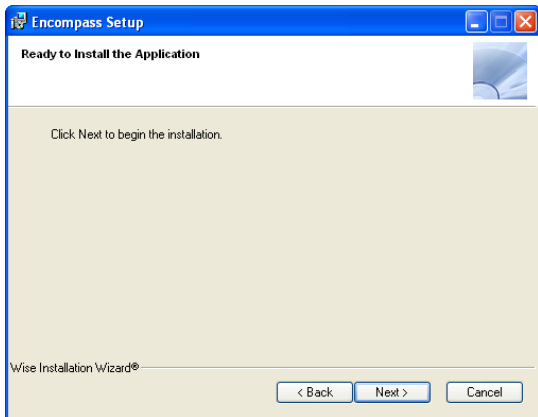




6 Close all Windows applications and click **Next**.

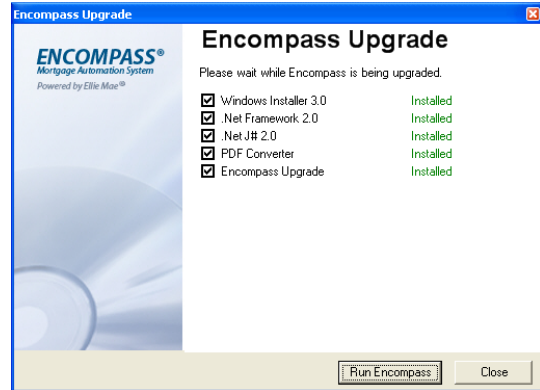


7 On the License Agreement window, review the agreement. If you agree, select **I accept the license agreement**, and then click **Next** to proceed.



8 On the Encompass Setup window, click **Next** to begin the installation.

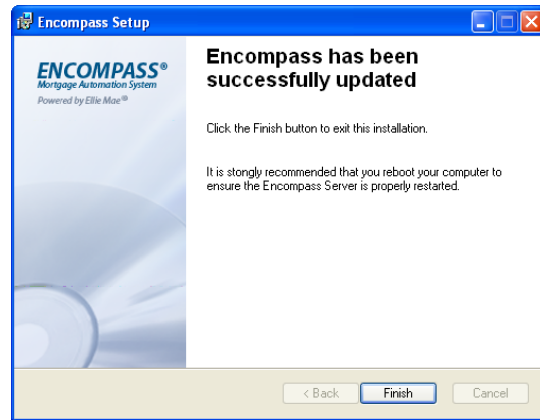
The installation will take several minutes. During that time, messages will describe the tasks being performed and the progress of the installation.



When the installation is complete, if third-party applications were also installed, the status window indicates that all components have been installed.

9 Click **Run Encompass** to exit the installation program and log on to Encompass, or click **Close** to exit the installation program.

If only Encompass was updated, the following window opens when the installation is complete.



10 Click **Finish** to exit the installation program.

Client Installation

The first time your users try to log on to Encompass after the server is updated, the Version Update window opens. Users cannot log on to Encompass without installing the update.

To Update a Client:

- 1 On the client computer, on the Version Update window, click **Update Now**.
- 2 The client installation proceeds through the same process as described above for the server installation.