



Encompass/FiServ Interface

New User Setup

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Document Revisions

Date	Version	Name	Description
09/09/11	Draft	Deborah Holmes	Draft
09/12/11	Final	Deborah Holmes	Modifications made based on input from Paul Moseley.

ENCOMPASS - FISERV INTERFACE NEW USER SETUP

The Encompass - FiServ Interface is used to access borrower portfolios and board loans in Encompass. Once the user has access to the interface, s/he can look at borrowers and portfolios in FiServ and pull Borrower data into Encompass to board loans.

The Encompass - FiServ Interface requires the following applications be setup on the user's computer.

- .Net 3.5
- Encompass Application
- FiServ Application

Once these applications are setup for the user, access can then be completed for the Navigator application and the Servicing Persona can be setup in Encompass.

REQUESTING ACCESS FOR A NEW USER

Before a user can access servicing information in Encompass, installation requests must be sent to install the necessary client-side applications. Once the client-side applications are installed, the new user and applicable Persona can be setup in Encompass.

Send installation requests as follows:

- .Net 3.5 - Holly Yanushka
- Encompass to FiServ interface client-side app install – Holly Yanushka
- Encompass Application – Holly Yanushka
- Navigator – Paul Moseley

For now, send all Encompass installation requests directly to Holly Yanushka.

Send all Encompass new user requests to the Mortgage Systems group.

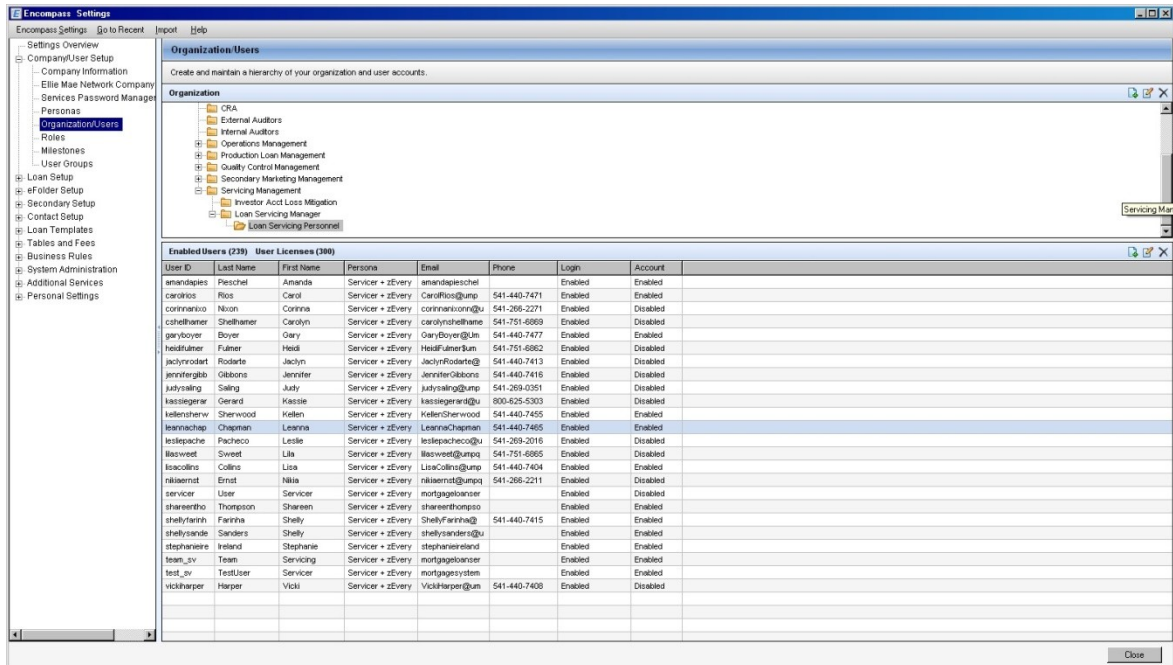
ADDING A NEW USER PERSONA IN ENCOMPASS

When requesting access for a new user, the person requesting access needs to verify the user is in the Servicing group and has access to all the same servicing information in Encompass.

TO ADD A NEW USER PERSONA IN ENCOMPASS


When adding a user Persona in Encompass, the *Servicer* Persona and the *0273 Team_SV* Group view rights must be included on the user profile.

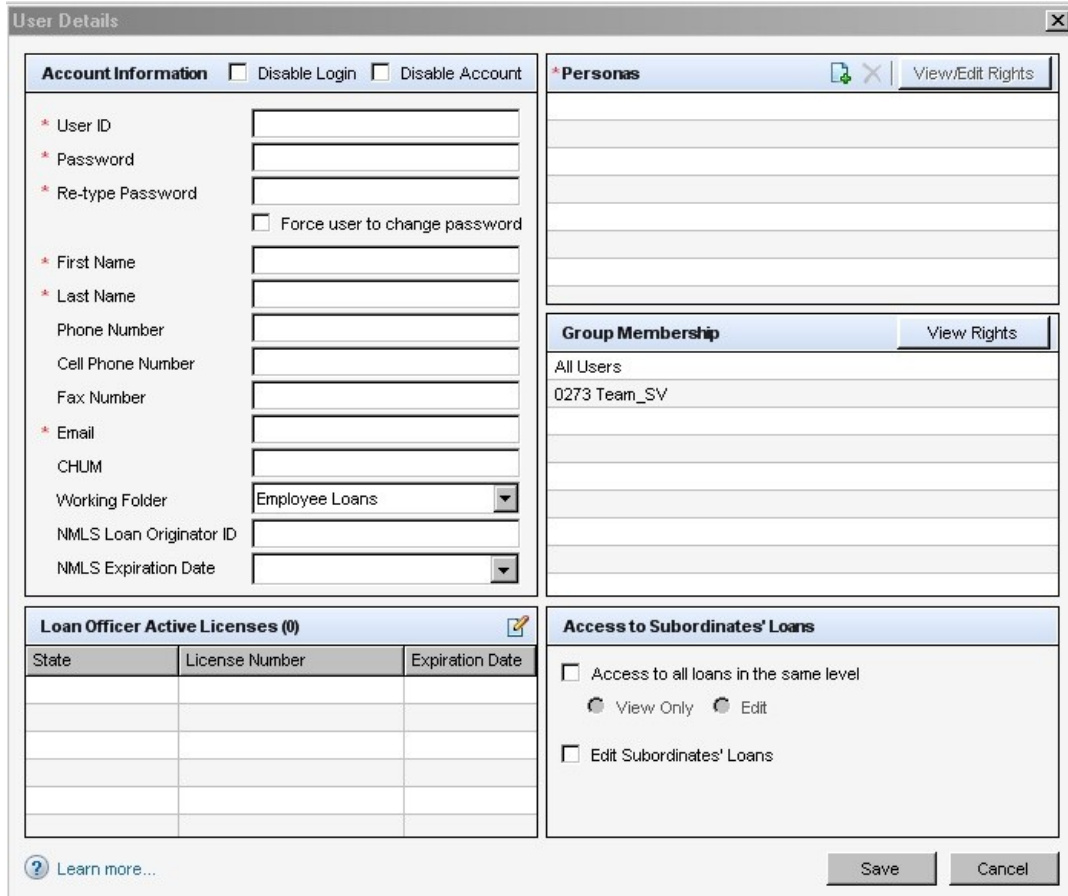
1. From Encompass, select *Encompass Settings > Organization/Users*



User ID	Last Name	First Name	Persona	Email	Phone	Logn	Account
anandapies	Pieschel	Amanda	Servicer + zEvery	anandapieschel		Enabled	Enabled
carolrios	Rios	Carol	Servicer + zEvery	Carolfrios@ump	541-440-7471	Enabled	Enabled
corinnaco	Nixon	Corinna	Servicer + zEvery	corinnaco@ump	541-269-2271	Enabled	Disabled
carolynshel	Shelhamer	Carolyn	Servicer + zEvery	carolynshelname	541-751-6969	Enabled	Disabled
garyboyer	Boyer	Gary	Servicer + zEvery	GaryBoyer@ump	541-440-7477	Enabled	Enabled
heidfulmer	Fulmer	Heidi	Servicer + zEvery	HeidiFulmer@ump	541-751-6962	Enabled	Disabled
jaclynrodar	Rodarte	Jaclyn	Servicer + zEvery	JaclynRodarte@ump	541-440-7413	Enabled	Disabled
jenniferjgib	Gibbons	Jennifer	Servicer + zEvery	JenniferGibbons	541-440-7416	Enabled	Disabled
justysalng	Salng	July	Servicer + zEvery	Justysalng@ump	541-269-0561	Enabled	Disabled
kassiegerard	Gerard	Kassie	Servicer + zEvery	kassiegerard@ump	800-625-5303	Enabled	Enabled
kellerherwo	Sherwood	Kellen	Servicer + zEvery	KellerSherwood	541-440-7455	Enabled	Enabled
leannachap	Chapman	Leanna	Servicer + zEvery	LeannaChapman	541-440-7465	Enabled	Enabled
lestepachec	Pacheco	Lesse	Servicer + zEvery	lestepacheco@ump	541-269-2016	Enabled	Disabled
lisaoswee	Sweet	Lisa	Servicer + zEvery	lisaoswee@ump	541-751-6965	Enabled	Disabled
lucacollins	Collins	Lisa	Servicer + zEvery	LisaCollins@ump	541-440-7404	Enabled	Enabled
naliaemst	Ernst	Nalia	Servicer + zEvery	naliaemst@ump	541-269-2211	Enabled	Disabled
servicer	User	Servicer	Servicer + zEvery	nortgage@loanser		Enabled	Enabled
sharentho	Thompson	Shareen	Servicer + zEvery	shareenthomps		Enabled	Enabled
shellyfarrin	Farrina	Shelly	Servicer + zEvery	ShellyFarrina@ump	541-440-7415	Enabled	Enabled
shellysande	Sanders	Shelly	Servicer + zEvery	shellysander@ump		Enabled	Enabled
stephanieis	Inland	Stephanie	Servicer + zEvery	stephanieisland		Enabled	Enabled
team_sv	Team	Servicing	Servicer + zEvery	nortgage@loanser		Enabled	Enabled
test_sv	TestUser	Servicer	Servicer + zEvery	nortgage@system		Enabled	Enabled
vickharper	Harper	Vicki	Servicer + zEvery	VickiHarper@ump	541-440-7408	Enabled	Enabled

2. Drill down to select the Loan Servicing Personnel Folder under Servicing Management | Loan Servicing Personnel. The User ID, Name, Personal, Email, and Phone details appear in the Enabled Users | User Licenses pane.

- Click the Add icon  to open the **User Details** dialog.



The **User Details** dialog box is divided into several sections:

- Account Information:** Includes fields for * User ID, * Password, * Re-type Password, * First Name, * Last Name, Phone Number, Cell Phone Number, Fax Number, * Email, CHUM, Working Folder (dropdown menu), NMLS Loan Originator ID, and NMLS Expiration Date. There are also checkboxes for "Disable Login" and "Disable Account", and a checkbox for "Force user to change password".
- Personas:** A table with a "View/Edit Rights" button.
- Group Membership:** A table with a "View Rights" button. It lists "All Users" and "0273 Team_SV".
- Loan Officer Active Licenses (0):** A table with columns for State, License Number, and Expiration Date.
- Access to Subordinates' Loans:** Includes checkboxes for "Access to all loans in the same level" (with radio buttons for "View Only" and "Edit") and "Edit Subordinates' Loans".

At the bottom, there is a "Learn more..." link and "Save" and "Cancel" buttons.

- Enter the required Account Information details for the new user in the applicable fields.
- Enter any applicable optional information in the remaining fields.
- Select *My Pipeline* from the Working Folder drop-down list.

7. Click the Personas *Add* icon; the Persona Selection dialog opens.



8. Scroll down and select the *Servicer* persona. Click *OK*. The selection made appears in the Persona list in the User Details dialog.
9. Click *Save* to finish. The new user and applicable Persona appears in the Enabled Users | User Licenses pane.



When a user requires additional access, the manager requesting access must do the following:

- Fill out the Access Change form
- Send the form via e-mail to the Systems Services group
- Ask for C-Station and specify the C-Station be allocated to the Mortgage group



REQUESTING ADDITIONAL ACCESS

Requesting additional access is completed via the *Access Change Form*. The manager requesting access must fill out the **Access Change** form, and send the form to the Systems Services group.

To access the Access Change form

Before filling out the access change form, send the request for the c-station assignment to Ricky Silvas - TAG.

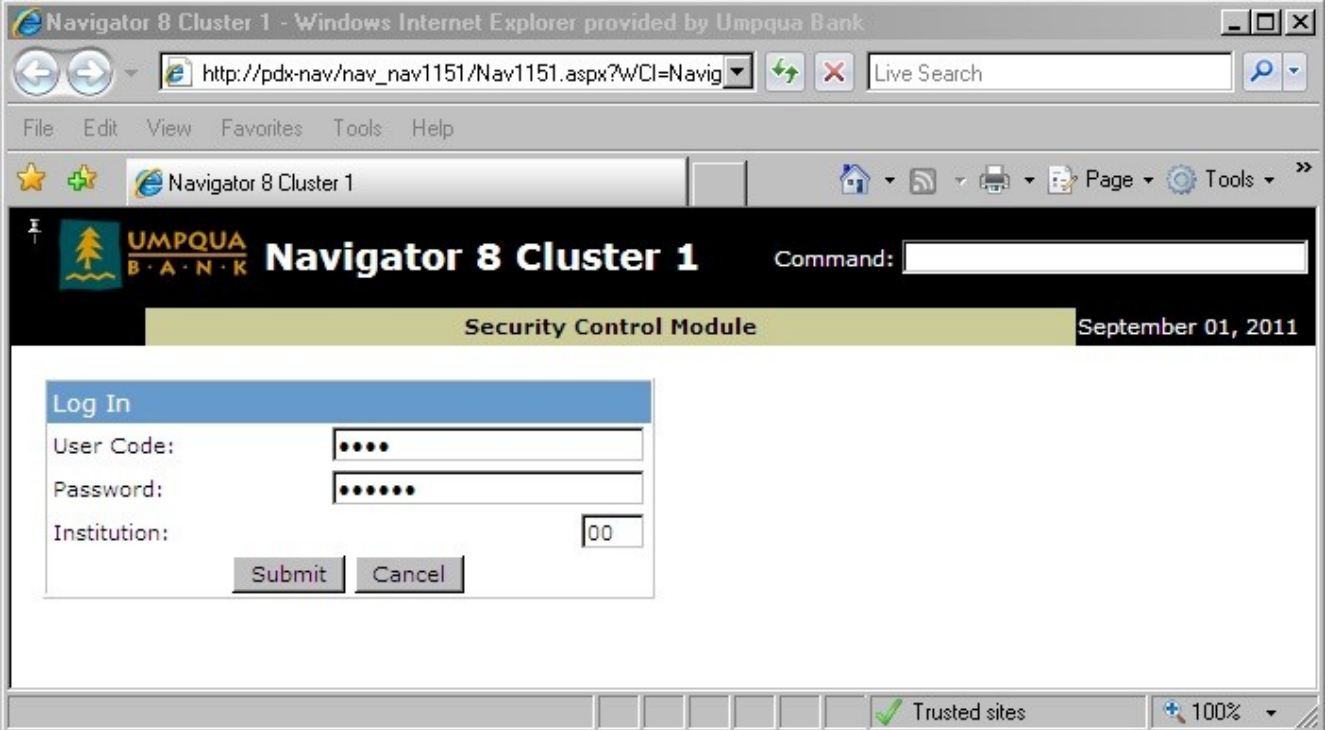
1. From the Umpqua Intranet, select *Forms > Associates > New or Changes*
2. Select the *Access Change (Navigator, Director & Premier Teller)* link.
3. Select *Open* from the File Download dialog. The form opens on your computer.
4. Fill out the form and e-mail to Systems Services group.
Be sure to include all details of the changes being requested.

FiSERV INTERFACE - NAVIGATOR APPLICATION

Access to the FiServer Interface requires login credentials to the Navigator application. The Systems Services group is responsible for assigning login credentials to the Navigator application.

Before obtaining access to the FiServ Interface, be sure the new user has access in the servicing system to complete inquiries and board new loans.

The Navigator Application requires a 4 digit user code and a 6 digit password.



TO LOG IN TO NAVIGATOR,

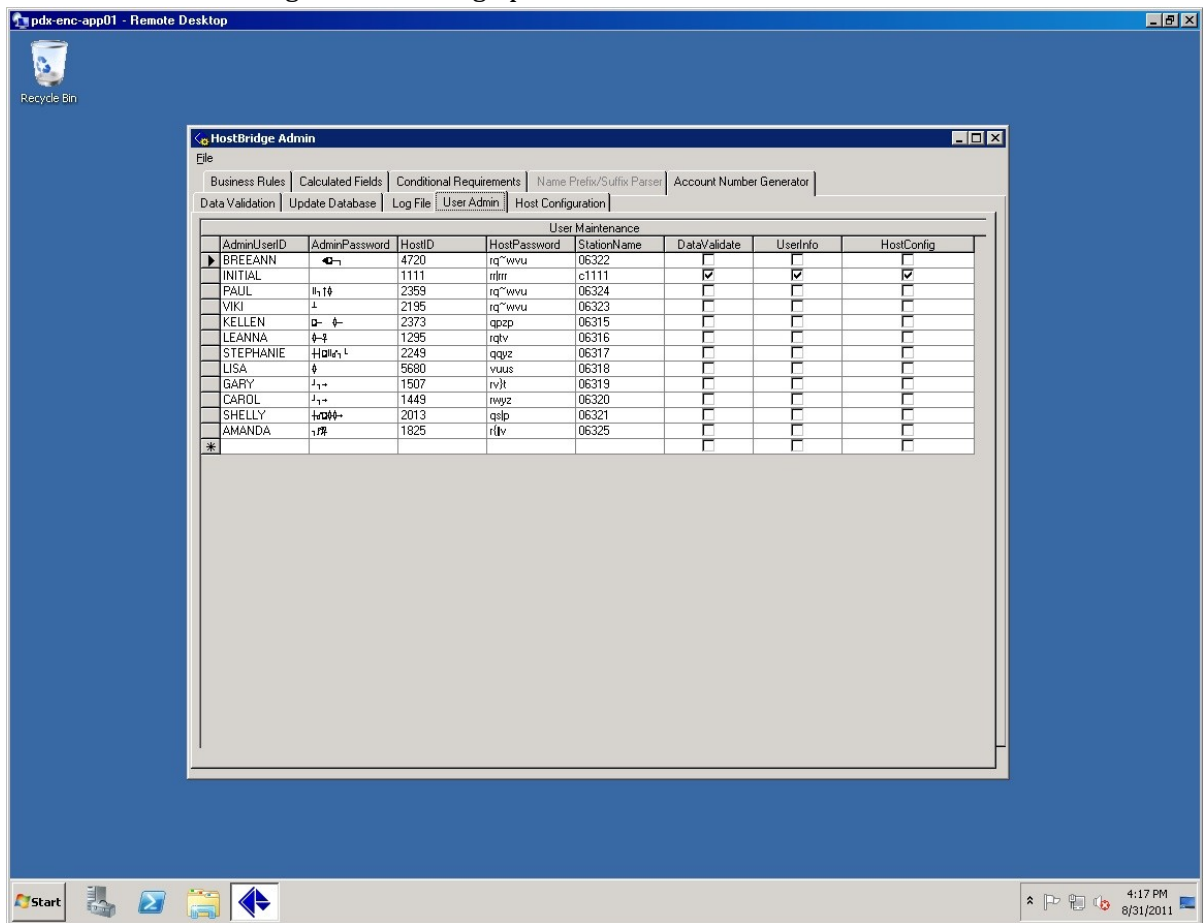
1. Select *Applications > Umpqua - Navigator* link. The Navigator 8 Cluster 1 Security Control Module opens.
2. Enter the *User Code > Password*
3. Click *Submit*

ADDING A USER TO THE INTERFACE

The CCMCBridge is used to add a user to the Encompass-FiServ Interface. Paul Moseley – TAG is responsible for adding users to the interface. When requesting access to the interface, the request must include the C-Station name, which should already be sent and received from Ricky Silvas - TAG.

TO ADD A USER TO THE INTERFACE

1. Open a web browser, and type the URL using the remote computer's name or IP address.
2. On the Remote Desktop Web Connection logon screen, *type the server name* (the remote computer name), and then click *Connect*.
3. Type your *user name and password*, and then click *OK*.
4. Select *Start > All Programs > CCMC > HostBridge > "host" > HostBridge Admin*. The Bridge Admin Login dialog opens.
5. Enter the *User Name and Password*.
6. Click *OK*. The HostBridge Admin dialog opens.



7. Enter the *Host ID > Navigator ID > C-Station ID*. (Repace the C with a 0 when entering the station ID).