



# User Session Descriptions by Track

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## Encompass EXPERIENCE 2012 User Track and Session Descriptions

Attend a track or mix it up. Please indicate which sessions you would like to attend when registering for Encompass EXPERIENCE 2012.

### Six specialized tracks—diving deep into topics that matter to you the most

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#### User Track A

##### **Compliance: Achieving loan quality and compliance through better workflow**

Learn best practices for using Encompass360® and integrated services to establish an efficient workflow that helps foster compliant and quality loans.

#### User Track B

##### **Cutting Edge, Cutting Cost: Paperless, third-party origination and mobile solutions**

Discover how to cut costs and provide cutting edge service to your clients at the same time. Sessions include going paperless, third-party origination, mobile solutions and building repeat business.

#### User Track C

##### **Automation Acceleration: Using integrated products and services to drive efficiencies and the future of mortgage technology**

Explore some of our newest products and services and lend your own ideas about the future of mortgage technology and automation in a special town hall discussion.

#### User Track D

##### **Tips, Tricks, and Traps: What's new with the Encompass360 Fall 2012 Release, secondary marketing and Ellie Mae Network™. Plus something special for DataTrac® users**

Put more tools in your toolbox and learn the latest tips and tricks for using Encompass360 to accelerate the mortgage process. Topics include the Encompass360 Fall 2012 Release, new secondary marketing enhancements and what's new on the Ellie Mae Network. Plus: A special live case study for DataTrac clients.

#### User Track E

##### **Just for Techies: Optimizing the Encompass360 SDK and more**

For all CIOs, system administrators, and technology lovers alike. Learn how to use custom business rules, fields, and forms, as well as the Encompass SDK for maximum success. Share your knowledge and learn from your peers. Plus, show off your skills in our special contest.

#### User Track F

##### **Performance: Maximizing user performance through the Encompass360 eFolder, training and user access management**

Expert tips, tricks, and training that will help you take the "work" out of workflow. Topics include the Encompass360 eFolder, managing user access, maximizing channel flow and how Ellie Mae® can lend a hand with customized training and professional services.

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Choose all sessions in one track or mix and match sessions to get the EXPERIENCE you want.

## Schedule at a Glance

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### MONDAY, OCTOBER 1

8:00 a.m. - 9:00 p.m. Attendee arrival/registration open  
*Encompass® EXPERIENCE 2012 attendees are encouraged to arrive on October 1 and pick up their credentials. Attendees who pick up their credentials on October 1 will be entered into an early-arrival drawing to win special prizes.*

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### TUESDAY, OCTOBER 2

8:30 a.m. - 10:30 a.m. Opening general session featuring Sig Anderman, Ellie Mae® founder and CEO, and David H. Stevens, MBA president and CEO

10:00 a.m. - 4:00 p.m. Ellie Mae Partner Connection showcase and exhibits

10:00 a.m. - 4:00 p.m. EllieCares "Build-a-Bike," benefitting the Patrick Kelley Youth Foundation

10:30 a.m. - 11:00 a.m. Refreshment break

11:00 a.m. - 12:00 p.m. USER SESSIONS  
**User Track A: Compliance** | Riding the Regulatory Wave  
**User Track B: Cutting Edge, Cutting Cost** | Harnessing the Power of Paperless  
**User Track C: Automation Acceleration** | Turning Commissions Into Competitive Advantage  
**User Track D: Tips, Tricks, and Traps** | What's Next: The Encompass360® Fall 2012 Release  
**User Track E: Just for Techies** | Customizing Encompass360—Forms, Fields, Rules and More  
**User Track F: Performance** | Making Your Encompass360 Home Page Work for You

12:15 p.m. - 1:45 p.m. Lunch

2:00 p.m. - 3:00 p.m. USER SESSIONS  
**User Track B: Cutting Edge, Cutting Cost** | Spotlight: Third-Party Origination  
**User Track C: Automation Acceleration** | Spotlight: New Encompass Docs Solution  
**User Track D: Tips, Tricks, and Traps** | Tackling Lock Desk and Secondary Market Challenges  
**User Track E: Just for Techies** | Encompass360 System Administration  
**User Track F: Performance** | System Utilization and Best Practices

3:00 p.m. - 3:30 p.m. Refreshment break

3:30 p.m. - 5:00 p.m. Keynote session featuring Peter Navarro, economics and public policy professor at University of California, Irvine, and Barry Habib, vice president and chief market strategist, Residential Finance Corporation

6:30 p.m. - 9:30 p.m. Networking reception and Ellie Mae Hall of Fame celebration at TRYST Nightclub

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Subject to change without notice

## Schedule at a Glance

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### WEDNESDAY, OCTOBER 3

- 8:00 a.m. - 9:00 a.m. USER SESSIONS  
**User Track A: Compliance** | Town Hall: The Regulatory Roadmap  
**User Track C: Automation Acceleration** | Spotlight: New Encompass Docs Solution  
**User Track D: Tips, Tricks, and Trap** | DataTrac Client Case Study: Making the Move to Encompass360  
**User Track E: Just for Techies** | Contest: How Tech are You?  
**User Track: Performance** | WebCenter How to...
- 9:15 a.m. - 10:45 a.m. Keynote session featuring Ron Insana, CNBC senior analyst and commentator
- 10:30 a.m. - 3:00 p.m. EllieCares "Build-a-Bike," benefitting the Patrick Kelley Youth Foundation
- 10:30 a.m. - 7:30 p.m. Ellie Mae Partner Connection showcase and exhibits
- 10:45 a.m. - 11:15 a.m. Refreshment break
- 11:15 a.m. - 12:15 p.m. USER SESSIONS  
**User Track A: Compliance** | Using Encompass Compliance Service to Facilitate Compliance  
**User Track B: Cutting Edge, Cutting Cost** | Town Hall: What Do You Want from a Mobile Solution?  
**User Track C: Automation Acceleration** | Turning Commissions Into Competitive Advantage  
**User Track D: Tips, Tricks, and Traps** | Spotlight: Automated Product and Pricing  
**User Track E: Just for Techies** | Customizing Encompass360—the SDK Advantage  
**User Track F: Performance** | Paperless Operations—How to Make Your Work Flow
- 12:30 p.m. - 2:00 p.m. Lunch
- 2:15 p.m. - 3:15 p.m. USER SESSIONS  
**User Track A: Compliance** | An Easier Path to Loan Quality  
**User Track B: Cutting Edge, Cutting Cost** | Improving Customer Experience  
**User Track C: Automation Acceleration** | Town Hall: The Future of Mortgage Automation  
**User Track D: Tips, Tricks, and Traps** | Achieving Efficiency through The Ellie Mae Network  
**User Track E: Just for Techies** | Eye on API—System Configuration and More  
**User Track F: Performance** | Effectively Managing Encompass360 User Access
- 3:15 p.m. - 3:45 p.m. Refreshment break
- 4:00 p.m. - 5:30 p.m. Closing general session with Ellie Mae Founder and CEO Sig Anderman and Radian Group CEO S.A. Ibrahim
- 5:30 p.m. - 7:30 p.m. Closing Networking reception

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Subject to change without notice

## User Track A: Compliance

**USER TRACK A: Compliance** **Tuesday** **10.2.2012** **11:00 a.m. - 12:00 p.m.**

**TITLE: Riding the Regulatory Wave—Without Wiping Out on ULDD, Dodd-Frank or QM**

Strategic insight into what’s new (ULDD, UAD, UCDP), what’s on the horizon (Dodd-Frank’s UDAP, QM/QRM, and TILA/RESPA integrated disclosure) and what it all means for your business’ present and future. Plus, an in-depth exploration of the latest RESPA changes and Ellie Mae’s plans for supporting your business.

**Suggested for:** Management, Operations managers, Loan officers and processors, Compliance managers

**Ellie Mae presenters:** Angela Cheek, senior director, product compliance; John Haring, compliance enablement manager

**USER TRACK A: Compliance** **Wednesday** **10.3.2012** **8:00 a.m. - 9:00 a.m.**

**TITLE: Compliance Town Hall: The Regulatory Roadmap—Uncovering Opportunities Beneath the Challenges**

Join Ellie Mae compliance experts and peers from across the country and share your thoughts about the current and upcoming regulatory landscape and our strategies for helping keep you compliant.

**Suggested for:** Management, Operations managers, Loan officers and processors, Compliance managers

**Special guest speaker:** Tim Lange, senior director, policy – Conference of State Bank Supervisors

**Ellie Mae presenters:** Parvesh Sahi, vice president, compliance solutions; Angela Cheek, senior director, product compliance; Michael Black, product manager; John Haring, compliance enablement manager

**USER TRACK A: Compliance** **Wednesday** **10.3.2012** **11:15 a.m. - 12:15 p.m.**

**TITLE: Using Encompass Compliance Service to Facilitate RESPA, SARS and Dodd-Frank Compliance**

An in-depth exploration of the latest and upcoming Encompass Compliance Service enhancements and best practices for leveraging these updates to facilitate compliance with the latest regulations. Recommended for companies currently using Encompass Compliance Service or those interested in automating their compliance management procedures.

We’ll cover:

- Enhanced RESPA support
- Suspicious activity reports support (SARS)
- Disclosure updates
- Dodd-Frank
  - RESPA/TILA disclosure integration
  - Loan originator compensation
  - Ability-to-repay/qualified mortgage (QM)
  - Fair lending/UDAAP

**Suggested for:** Management, Operations managers, Loan officers and processors, Compliance managers

**Ellie Mae presenters:** Parvesh Sahi, vice president, compliance solutions; Michael Black, product manager; John Haring, compliance enablement manager; Cheryl Hemingway, compliance solutions specialist

**USER TRACK A: Compliance** **Wednesday** **10.3.2012** **2:15 p.m. - 3:15 p.m.**

**TITLE: An Easier Path to Loan Quality**

“Quality over quantity” has never been truer for how lenders and investors work together to buy and sell loans. But what exactly defines a quality loan? We’ll explain why and explore the latest best practices for using business rules, workflow controls and Ellie Mae’s Total Quality Loan program to drive loan quality in Encompass360 when it counts the most.

**Suggested for:** Management, Operations managers, Loan officers and processors, Compliance managers, Secondary marketing managers, Underwriters

**Ellie Mae presenters:** Lisa Schreiber, vice president, lender business development; Lori Wahl, solutions specialist; Ronyelle Banks, business analyst

## User Track B: Cutting Edge, Cutting Cost

**USER TRACK B: Cutting Edge, Cutting Cost**      **Tuesday**      **10.2.2012**      **11:00 a.m. - 12:00 p.m.**

**TITLE: Harnessing the Power of Paperless with Electronic Document Management**

Best practices and in-depth demonstration for using Encompass360’s electronic document management (EDM) capabilities to drive efficiencies and performance in a paperless environment. Recommended for current electronic document users or any business considering converting to a paperless workflow. Learn the ins and outs and the must haves for succeeding in a paperless environment, including:

- Executive endorsement
- Image at document receipt
- Investor collaboration
- Distribution procedures
- Secure portals and transports for borrower interaction
- Barcode and automated identification risk and rewards
- Disclosure tracking

Recommended for current electronic document users or any business considering converting to a paperless workflow.

**Suggested for:** Management, System administrators, Operations managers, Loan officers and processors, Underwriters

**Ellie Mae presenters:** Troy Coggiola, director, product management; Frank Colson, product manager

**USER TRACK B: Cutting Edge, Cutting Cost**      **Tuesday**      **10.2.2012**      **2:00 p.m. - 3:00 p.m.**

**TITLE: Spotlight: Third-Party Origination**

Do you have the right procedures in place to manage the performance of third-party originators? We’ll discuss best practices for implementing and establishing third-party origination controls in order to maximize or kick start your third-party origination efforts. Plus: An in-depth preview of upcoming Encompass TPO WebCenter enhancements.

**Suggested for:** Correspondent lenders, Wholesale lenders, Management, Operations managers, Loan officers and processors

**Ellie Mae presenters:** Jeff English, director, product management; Srilatha Davuluri, product manager

**USER TRACK B: Cutting Edge, Cutting Cost**      **Wednesday**      **10.3.2012**      **11:15 a.m. - 12:15 p.m.**

**TITLE: Town Hall: What Do You Want from a Mobile Solution?**

Join Ellie Mae’s product team and peers from across the country and help us shape the future of our web and mobile solutions. What do you want see developed? What do you need out of a mobile solution? Have your say and get one of the first looks at Ellie Mae’s mobile solution prototypes.

**Suggested for:** Management, System administrators, Operations managers, Loan officers and processors, Compliance managers, Closers/Funders, Lock desk managers, Secondary marketing managers

**Ellie Mae presenters:** Jonas Moe, vice president, product strategy; Jeff English, director, product management

**USER TRACK B: Cutting Edge, Cutting Cost**      **Wednesday**      **10.3.2012**      **2:15 p.m. - 3:15 p.m.**

**TITLE: Improving Customer Experience: Stepping Into the Borrower’s Shoes**

Understanding the borrower’s mindset and how you can use it and Encompass360 to forge stronger relationships and the best customer experience. We’ll explore:

- How the borrower prepares to apply for a loan
  - What information do they need?
  - What information do they think they need?
- How they apply for a loan
  - Are online applications the answer?
- The borrower’s role during processing
  - Disclosure inundation
  - Service appointments
- How is the borrower communicated to throughout the process?
- During closing
  - What’s next?

**Suggested for:** Operations managers, Loan officers and processors, Compliance managers, Closers

**Ellie Mae presenters:** Frank Colson, product manager; Srilatha Davuluri, product manager

## User Track C: Automation Acceleration

<b>USER TRACK C: Automation Acceleration</b>	<b>Tuesday</b>	<b>10.2.2012</b>	<b>11:00 a.m. - 12:00 p.m.</b>
<b>USER TRACK C: Automation Acceleration</b>	<b>Wednesday</b>	<b>10.3.2012</b>	<b>11:15 a.m. - 12:15 p.m.</b>

**TITLE: Turning Commissions Into Competitive Advantage—“Did We Pay the Right Amount?”**

How to move beyond spreadsheets and manual calculations to help eliminate potential inaccuracies and hidden costs of commissions management and enforce and document compliance. Plus, live demonstration and client case study for using Encompass Commissions to:

- Automate compensation calculation
- Streamline plan payouts
- Simplify approval workflow
- Automate eligible loan payouts
- Overlay payouts for management overrides

**Suggested for:** Management, Accounting/payroll, System administrators, Operations managers, Loan officers

**Special guest speaker:** Janet Fell, vice president, William Raveis Mortgage, LLC

**Ellie Mae presenters:** Sue Sroka, vice president, client services; Alex Gillette, product manager; Tom Lyons, pricing solutions sales specialist

<b>USER TRACK C: Automation Acceleration</b>	<b>Tuesday</b>	<b>10.2.2012</b>	<b>2:00 p.m. - 3:00 p.m.</b>
<b>USER TRACK C: Automation Acceleration</b>	<b>Wednesday</b>	<b>10.3.2012</b>	<b>8:00 a.m. - 9:00 a.m.</b>

**TITLE: Spotlight: New Encompass Docs Solution (WILL REPEAT WEDNESDAY 8:00 A.M.)**

See how our new, integrated Encompass Docs Solution™ provides better performance, greater visibility into your document data, increased flexibility and control of document packages, and comprehensive compliance tests so you can draw initial and closing documents confidently and in less time. Plus, live demonstration and client case studies for using Encompass Docs Solution to:

- Automate initial disclosures and closing documents
- Include comprehensive audit tests and plan code comparisons
- Configure stacking orders
- Use custom plan codes and link to specific loan programs
- Use form selection logic or lender and investor overrides
- Identify overflow fields
- Track documents using document order logs
- Access more than 1,800 forms

**Suggested for:** Management, System administrators, Operations managers, Loan officers and processors, Closers/Funders, Compliance managers

**Ellie Mae presenters:** Rich Feinberg, director, product management; Cheryl Hemingway, solutions specialist; Karen Whitcomb, business analyst

<b>USER TRACK C: Automation Acceleration</b>	<b>Wednesday</b>	<b>10.3.2012</b>	<b>8:00 a.m. - 9:00 a.m.</b>
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**TITLE: Town Hall: The Future of Mortgage Automation**

**USER TRACK C: Automation Acceleration**

What challenges today will turn into opportunities tomorrow? What keeps you up at night? What’s the next boundary mortgage technology can break? Bring your unique perspective, share your thoughts and ideas, and join Ellie Mae’s product experts and peers from across the country to discuss the future of mortgage automation and the ongoing evolution of Encompass360.

**Suggested for:** Management, System administrators, Operations managers, Loan officers and processors, Compliance managers, Closers/Funders, Lock desk managers, Secondary marketing managers

**Ellie Mae presenters:** Jonas Moe, vice president, product management; Troy Coggiola, director, product management; Jeff English, director, product management; Rich Feinberg, director, product management



## User Track D: Tips, Tricks, and Traps

**USER TRACK D: Tips, Tricks, and Traps**      **Tuesday**      **10.2.2012**      **11:00 a.m. - 12:00 p.m.**

**TITLE: What's Next: The Encompass360 Fall 2012 Release**

Join us for an in-depth preview of the updates and enhancements coming November 2012 with the Encompass360 Fall 2012 release, including:

- Workflow enhancements, compliance changes, new features in secondary and trade management, electronic document management, product and pricing and more.

**Suggested for:** Management, System administrators, Operations managers, Loan officers and processors, Compliance managers, Closers/Funders, Lock desk managers, Secondary marketing managers

**Ellie Mae presenters:** Jonas Moe, vice president, product strategy; Jan Wilgus, director, product marketing

**USER TRACK D: Tips, Tricks, and Traps**      **Tuesday**      **10.2.2012**      **2:00 p.m. - 3:00 p.m.**

**TITLE: Tackling Lock Desk and Secondary Market Challenges**

Are you tracking trade details and percentage completion? Are you tying loan trades to MBS trades? How are you managing mandatory and AOT details? We'll explore these questions and more and detail best practices for using Encompass360 to fortify your lock desk workflow and manage secondary market challenges, including:

- Profit management
  - Reconciling purchase advices: Are you leaving money on the table?
- Time management
  - Are manual processes clogging your workflow?
- Encompass360 best practices
  - Advanced pricing grids
  - Purchase advice recognition
  - Integration with Encompass Product and Pricing Service

**Suggested for:** Management, System administrators, Operations managers, Secondary marketing managers, Lock desk

**Ellie Mae presenters:** Troy Coggiola, director, product management; Tom Lyons, pricing solutions sales specialist; Jenee Robinson, business analyst

**USER TRACK D: Tips, Tricks, and Traps**      **Wednesday**      **10.3.2012**      **8:00 a.m. - 9:00 a.m.**

**TITLE: DataTrac Client Case Study: Making the Move to Encompass360**

Hear from an Ellie Mae client who recently made the move from DataTrac to Encompass360 and size up the two solutions for yourself. Plus: Get the inside scoop on the future implementation of DataTrac functionality into Encompass360.

**Suggested for:** DataTrac clients, Management, System administrators, Operations managers, Loan officers and processors, Compliance managers, Closers/Funders, Lock desk managers, Secondary marketing managers

**Special guest speaker:** Tad Hensley, secondary manager, AmeriPro Funding

**Ellie Mae presenters:** Joe Tyrrell, vice president, strategic relationships; Jonas Moe, vice president, product strategy





## User Track D: Tips, Tricks, and Traps

<b>USER TRACK D: Tips, Tricks, and Traps</b>	<b>Wednesday</b>	<b>10.3.2012</b>	<b>11:15 a.m. - 12:15 p.m.</b>
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**TITLE: Spotlight: Automated Product and Pricing**

An in-depth look at the growing importance of automated product and pricing engines to the mortgage process. Plus: in-depth demonstration for leveraging Encompass Product and Pricing Service in Encompass360 for optimum success. And: Overview of recent Encompass Product and Pricing Service enhancements, including:

- Support for Fannie Mae and Freddie Mac programs and pricing
- Ability to price leads from mobile and web sources and push seamlessly into Encompass360
- Additional investor support

**Suggested for:** Management, Loan officers, Secondary marketing managers, Lock desk

**Ellie Mae presenters:** Troy Coggiola, director, product management; Tom Lyons, pricing solutions sales specialist; Jenee Robinson, business analyst

<b>USER TRACK D: Tips, Tricks, and Traps</b>	<b>Wednesday</b>	<b>10.3.2012</b>	<b>2:15 p.m. - 3:15 p.m.</b>
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**TITLE: Achieving Efficiency through The Ellie Mae Network**

**USER TRACK D: Tips, Tricks, and Traps**

Encompass360 users use the Ellie Mae Network inside Encompass360 more than 700,000 times on average every month to access the services they need to originate and manage mortgages. Discover what’s new on the Network and learn the latest best practices for securing the services you need right inside Encompass360. We’ll cover:

- Understanding the benefits of connecting electronically with service providers
- Service types and providers available in Encompass360
- How to gain workflow efficiencies
- Introduce new service providers available on the Ellie Mae Network

**Suggested for:** Management, System administrators, Operations managers, Loan officers and processors, Compliance managers, Closers

**Ellie Mae presenters:** Michelle Robinson, director of business development; Cathy Grossi, senior product marketing manager

## User Track E: Just for Techies

**USER TRACK E: Just for Techies** **Tuesday** **10.2.2012** **11:00 a.m. - 12:00 p.m.**

**TITLE: Customizing Encompass360, Part One – Forms, Fields, Rules and More** (PART TWO IS WEDNESDAY 11:15 A.M.)

Plus live demonstration and client case study covering:

- Post-closing checklists
- Underwriting comparisons
- Milestone tracking
- Automatic milestone completion for brokered loans
- Custom fee management
- Compliance “hard stop” rules
- USDA Guarantee Fee automation
- Dynamic pricing management to discount points

**Suggested for:** System administrators, IT managers, Operations managers

**Special guest speaker:** Heidi Wlasiuk, systems administration, George Mason Mortgage

**Ellie Mae presenters:** Devin Daly, vice president, solution sales; Troy Tomas, solutions engineer

**USER TRACK E: Just for Techies** **Tuesday** **10.2.2012** **2:00 p.m. - 3:00 p.m.**

**TITLE: Encompass360 System Administration: Setting Yourself Up for More Success**

Practical solutions, tips, and tricks for optimizing Encompass360 for your company. Plus: Provide your unique perspective and share your ideas in an interactive discussion with other Encompass360 system administrators from across the country. What’s the ideal setup? What configuration works best? Software vs. hardware? What are the pros and cons of SaaS? Have your say.

**Suggested for:** System administrators, IT managers, Operations managers

**Ellie Mae presenters:** Devin Daly, vice president, solution sales; Craig Anderson, solutions engineer; Troy Tomas, solutions engineer

**USER TRACK E: Just for Techies** **Wednesday** **10.3.2012** **8:00 p.m. - 9:00 a.m.**

**TITLE: Contest: How Tech Are You?**

Sign up for this session and we’ll contact you before Encompass EXPERIENCE 2012 with a specific business issue in Encompass360. Your assignment: Use your own technical skills to develop a solution to address a business need in one of the categories below and submit it to us prior to the Summit.

Contest categories:

1. Custom input forms
2. Workflow automation
3. Integrations with third-party software

Solutions will be evaluated for creativity and effectiveness. Winners will receive an exciting prize and be invited to present their solution to the audience during this session.

**Suggested for:** System administrators, IT managers, Operations managers

**Ellie Mae presenters:** Ken Kolda, software architect; Troy Tomas, solutions engineer; Craig Anderson, solutions engineer

## User Track E: Just for Techies

**USER TRACK E: Just for Techies**      **Wednesday**    **10.3.2012**      **11:15 a.m. - 12:15 p.m.**

**TITLE: Customizing Encompass360, Part Two – The SDK Advantage** (PART ONE IS TUESDAY 11:00 A.M.)

Explore the latest best practices and knowhow for leveraging the Encompass Software Development Kit (SDK) to connect Encompass360 with external applications and expand your technology reach and capabilities. Plus live demonstration and client case study covering:

- Loan exporter utilities
- Auto-locking a loan
- Batch loan updates
- Closing calendar automation and Sharepoint integration

**Suggested for:** System administrators, IT managers, Operations managers

**Special guest speaker:** Alan Rabideau, chief information officer/IT director, Residential Finance Corporation

**Ellie Mae presenters:** Devin Daly, vice president, solution sales; Troy Tomas, solutions engineer

**USER TRACK E: Just for Techies**      **Wednesday**    **10.3.2012**      **2:15 p.m. - 3:15 p.m.**

**TITLE: Eye on API—System Configuration and More**

Join us as we discuss Ellie Mae's open architecture vision and the future enhancements to the Encompass API, including expanding access to system configuration features, exposing partner services, and providing alternative interfaces such as WSDL-compliant web services. Provide your input and insight during this open discussion and help us align our strategy with your company's direction and define which features are of most value to your organization's continued success. We'll cover:

- Increasing exposure of Encompass360 business objects and processes
  - New database extensibility features
  - Programmatic access to services
  - Other considerations
    - Performance
    - .NET 4.0
- Next generation
  - Improved web and mobile support
  - WSDL/REST (version independent)
  - JSON

**Suggested for:** System administrators, IT managers, Operations managers

**Ellie Mae presenters:** Ken Kolda, software architect; Troy Tomas, solutions engineer

## User Track F: Performance

**USER TRACK F: Performance** **Tuesday** **10.2.2012** **11:00 a.m. - 12:00 p.m.**

**TITLE: “Home Page Sweet Home Page”—Making Your Encompass360 Home Page Work for You**

Learn how to optimize your individual Encompass360’s Home Page, pipeline and dashboard capabilities to keep real-time information that’s vital to your specific role and company’s bottom line at your fingertips.

**Suggested for:** Management, Operations managers, System administrators, Loan officers, Processors, Underwriters

**Ellie Mae presenters:** Lisa Evans, senior trainer; Annie Jacobson, curriculum developer

**USER TRACK F: Performance** **Tuesday** **10.2.2012** **2:00 p.m. - 3:00 p.m.**

**TITLE: System Utilization and Best Practices**

You don’t know what you don’t know... So learn how to best connect with Ellie Mae to identify potential efficiency, loan quality, and compliance gains that can be achieved through optimization, training, or other methods. We’ll discuss:

- Business challenges
  - Adopting new software tools
  - Maximizing use of software
  - Leveraging security access
  - Employee retention
  - Keeping current on lending requirements
  - Leveraging technology
  - Acceptance of new workflow
  - Incorporating paperless concepts
  - Keeping current on software changes
- Optimizing software use
  - Aware of available software tools and services
  - Streamline delivery to borrowers
  - Workflow management
  - Document your policies and procedures
  - Ongoing training
  - Compliance controls
  - Integrate it into your business model
  - Leveraging specialized applications
  - Support your staff
  - Appropriate equipment to run the software
- Services at your finger tips
  - Consulting, custom training, health checks, etc.

**Suggested for:** Operations managers, System administrators

**Ellie Mae presenters:** Sue Sroka, vice president, client services; Traci Andrews, training manager

**USER TRACK F: Performance** **Wednesday** **10.3.2012** **8:00 a.m. - 9:00 a.m.**

**TITLE: WebCenter How to...**

**USER TRACK F: Performance**

Best practices and understanding for how the Encompass WebCenter communicates with the Encompass360 eFolder and Status Online to facilitate data requests, eSigning and status updates for your borrowers. We’ll discuss:

- Borrowers
  - How they visit your WebCenter, fill out applications, or request consultation
  - How they send, receive, and eSign documents
  - How they upload signed documents
- Loan officers/processors
  - How to retrieve loan applications and consultation requests from Encompass360
  - How to use eFolder to request documents from borrowers
  - How to send eDisclosure packages
  - When and how to send status online updates
  - How to retrieve eDisclosure packages

**Suggested for:** Operations managers, Loan officers, Processors

**Ellie Mae presenters:** Lisa Evans, senior trainer; Annie Jacobson, curriculum developer

## User Track F: Performance

**USER TRACK F: Performance**      **Wednesday**      **10.3.2012**      **11:15 a.m. - 12:15 p.m.**

### **TITLE: Paperless Operations—How to Make your Work Flow**

Best practices for maximizing Encompass360's eFolder to achieve an efficient and compliant paperless workflow. We'll detail how to tackle common challenges—like outstanding conditions, document changes, use of document sets—and explore best practices for converting to a paperless environment without overhauling your current workflow. We'll discuss:

- Paperless challenges
  - Poor lending workflow
  - Insufficient equipment
  - Staff buy-in
  - Lack of training
- Converting to a paperless operation
- Document naming conventions
- Using document sets
- Keys to optimizing persona access
- Using business rules

**Suggested for:** Operations managers, System administrators, Loan officers and processors

**Ellie Mae presenters:** Sue Sroka, vice president, client services; Tracy Farber, manager, client services; Pam Faulkner, implementation project manager

**USER TRACK F: Performance**      **Wednesday**      **10.3.2012**      **2:15 p.m. - 3:15 p.m.**

### **TITLE: Effectively Managing Encompass360 User Access**

Learn how to use personas, user groups, business rules, and organizational hierarchy inside Encompass360 to help reinforce workflow requirements, control system access and ensure a secure, fluid origination process. Additional topics and demonstration include best practices for utilizing user profiles, roles and milestones.

**Suggested for:** Management, System administrators, Operations managers

**Ellie Mae presenters:** Lisa Evans, senior trainer; Annie Jacobson, curriculum developer