

Lender must have a **current (not expired)** Developer Connect addendum to the Lender's Encompass Master Service Agreement before an API Key will work when called.

The following workflow outlines the process for a partner to become a Supported Encompass Partner and **have access to a Lender's Encompass instance via the APIs:**

1. When the Lender receives the API Client ID, the Lender must create a new user profile for the Partner. The Lender takes the following steps within the Encompass Application:
 - On the Organization/Users screen, in the upper panel, click to select an organization folder to which to add the user. You may need to expand the hierarchy to locate the folder.
 - 2□ In the lower panel [Enabled Users], click the **New** icon.
 - 3□ On the User Details screen, in the left panel, type a User ID.
 - 4□ Select the **API User** check box.
 - 6□ Enter the Partner's **API Client ID**. This is the API Client ID that has been provided to the Partner by Ellie Mae. Your company's assigned Encompass Client ID cannot be used here.

The Lender follows the remaining steps in the Add a User process below as applicable. Note that only required fields (denoted with a red asterisk) need to be provided to save this new user.

- When adding a new user, the Lender is required to assign a persona to this user. The Lender can assign multiple personas, but at least one of the personas must be set up with permission to access LO Connect in order for this user to access the Lender's Encompass instance via the APIs.
(To enable LO Connect for a persona, in the Personas setting, select the persona, click the **Access** tab, select **Both Microsoft Windows Encompass Client and Encompass Mobile (LO Connect in a web browser)**, and click **Save**.)
Since the Supported Encompass Partner will be restricted from logging into Encompass, none of the access rights defined in the persona will come into play.
- Finally, remove from the "Not Accessible Column" on the Persona **any** field IDs required for use by the Partner during the integrated exchange of data.

New users indicated as an "API User" as described here count against the Lender's enabled user license limits. After the Lender creates the Partner API user, the Lender notifies the Partner that the Partner can now access the Lender's instance of Encompass using APIs.