Installing and Pairing PingID for Use With Encompass Loan Officer Connect (Two-Factor Authentication)

After Encompass Loan Officer Connect (Encompass LO Connect) access has been granted to your company, you can log in at http://www.encompassloconnect.com. As an added security measure, Encompass LO Connect utilizes a process known as two-factor authentication. When logging into Encompass LO Connect *for the first time*, you are prompted to install the Ping Identity (ID) app from the Google Play Store or the Apple App Store on your mobile device.

While this process is similar regardless of your device, there are differences. This guide provides instructions for using PingID on your Android device. Be sure to use the instructions intended for your device:

NOTE: These instructions are intended for use with an **Android** device. Instructions for installing and pairing PingID on an Apple iPhone or iPad are available here in a separate guide.

To Install PingID on your Mobile Device – Android

Installing PingID on Your Mobile Device

1. On your Android device, open the Chrome browser and navigate to the Encompass Loan Officer Connect site: http://www.encompassloconnect.com.

2. On the Log In page, tap the Client ID, User ID, and Password fields to enter your credentials, and then tap the **Login** button.
   NOTE: The Client ID is your SmartClient ID, which is provided by your Encompass administrator (for example, BE1234567*). This is not the same as your Client ID found under **Help** > **About Encompass** in the Encompass Desktop program.*
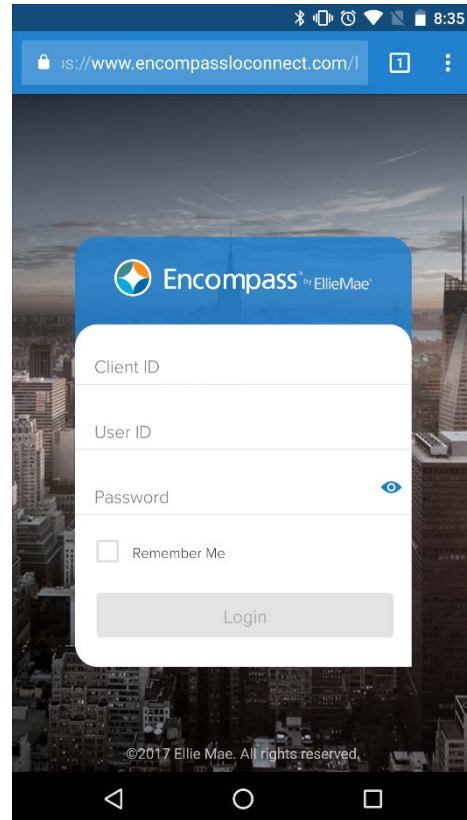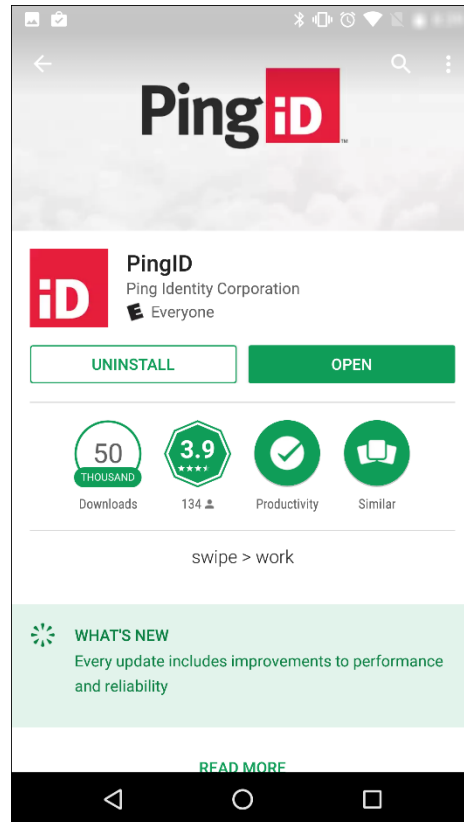
3. Upon logging in, and if this is the first time you are logging into Encompass LO Connect, you are prompted to install the PingID app. Tap the **Available for Android** button.
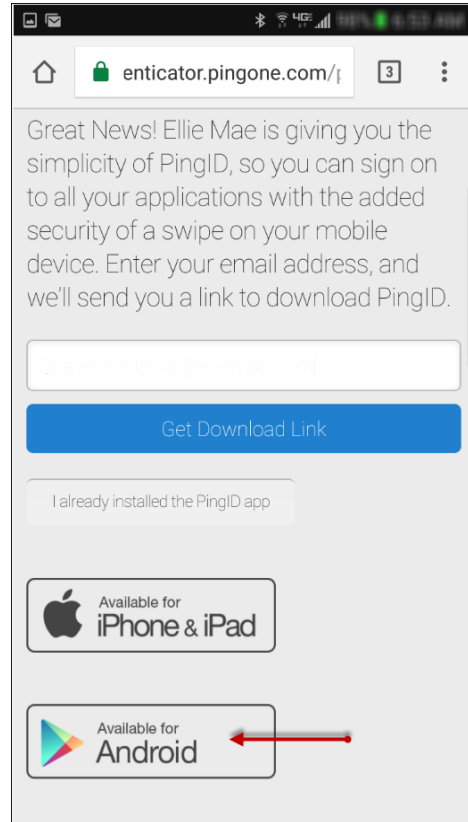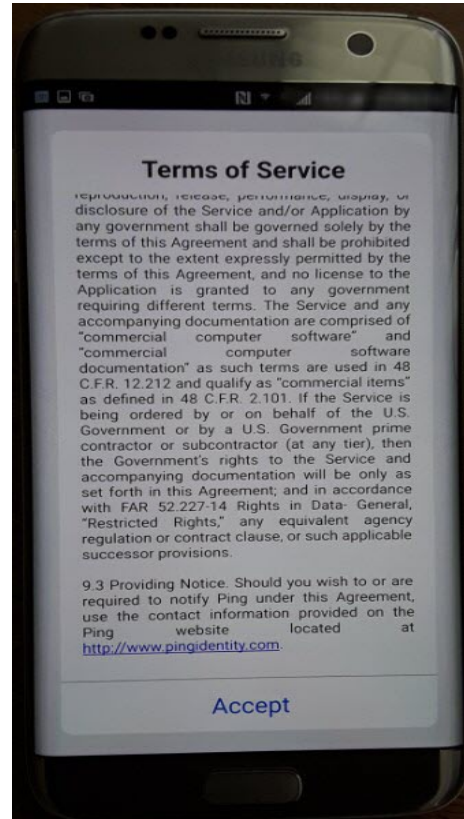
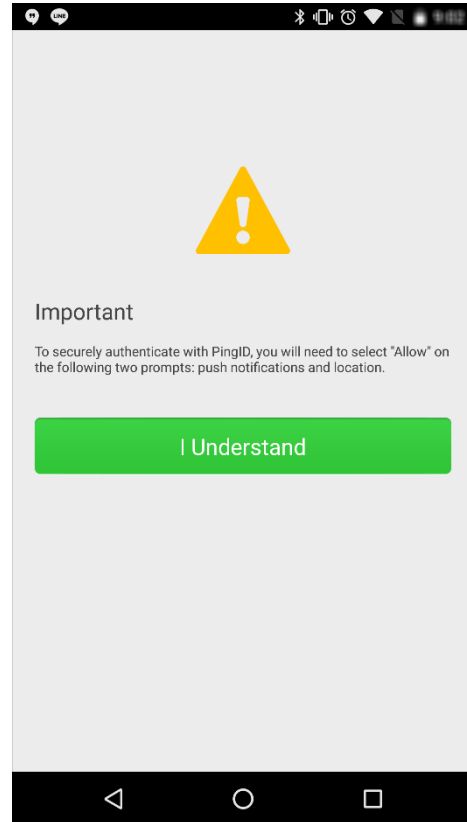4. On the Google Play Store screen, tap **Install**.
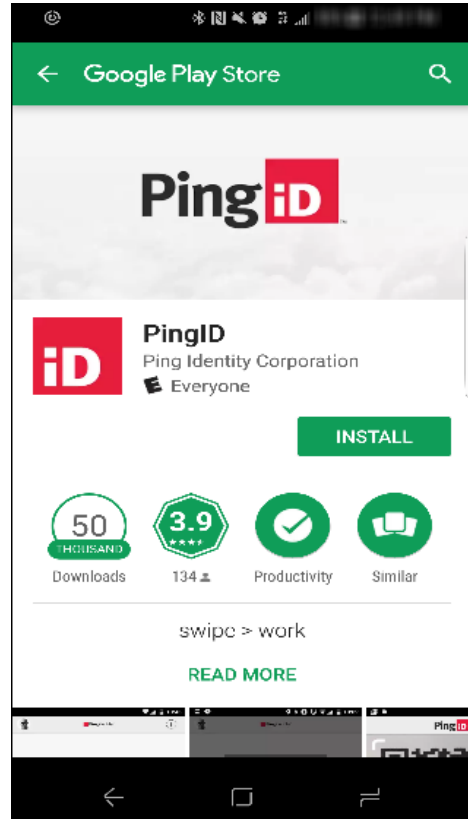
5. Tap **Open** to open the app.

6. Read the Terms of Service, and then tap **Accept**.

7. This screen explains that you will be prompted to "Allow" the PingID app to access your device's camera and use its location services, and that you must agree to this in order to successfully use the PingID app. Tap **I Understand** to continue.

8. Tap **Allow** when prompted to allow PingID to access your device's location when you are using the PingID app.
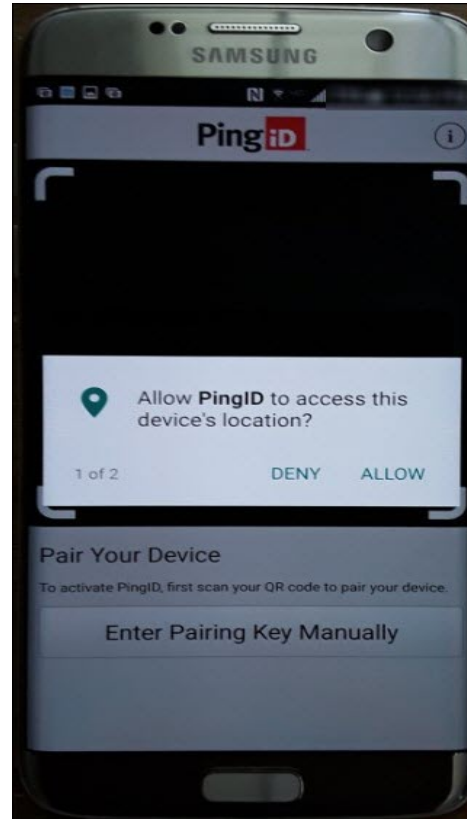
9. When prompted to allow PingID to access the camera, tap **Allow**. (The camera is required to scan the unique QR code that is required for pairing your device with PingID and Encompass LO Connect.)
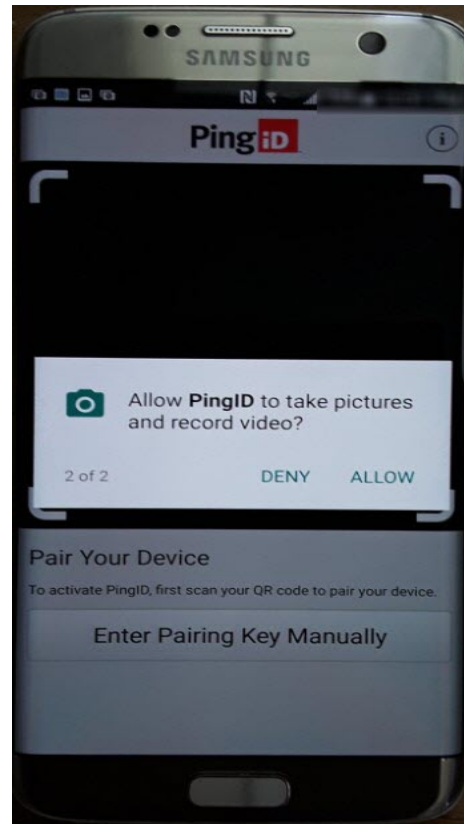
Pairing PingID with Your Mobile Device

After installing PingID and closing the settings screen as discussed in the previous steps - and if you have allowed PingID to access your device's camera- the Pair Your Device screen is displayed and your device is automatically set to camera mode.
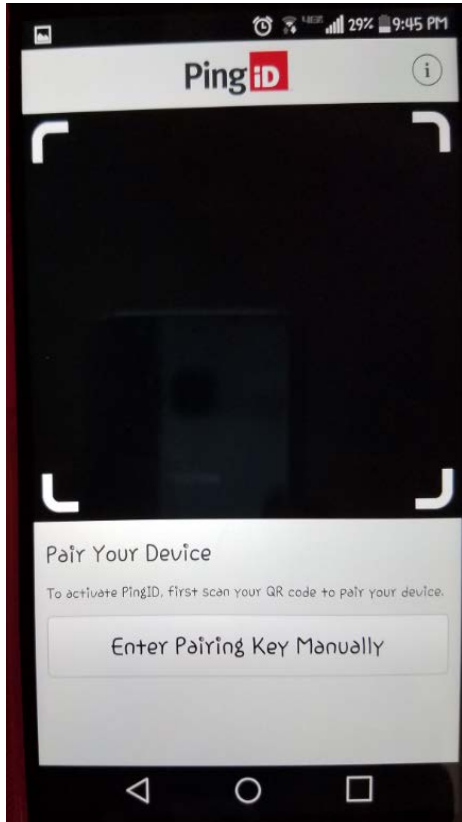
At this point you have several options to pair your device with PingID depending on your proximity to a computer and your email account. With these scenarios in mind, four pairing procedures are provided in this guide. Click a link to jump to the pairing procedure you want to use.

- Pairing using your mobile device and a computer (no email)
- Pairing using your mobile device and a computer (with email)
- Pairing using your mobile device only (no email)
- Pairing using your mobile device only (with email)

## Pairing using your mobile device and a Computer (no email)

From this screen you have the choice pair your device by scanning a QR code or by manually entering a pairing key.

1. On your computer (not your mobile device), open your browser and navigate to http://www.encompassloconnect.com. The PingID authenticator screen is displayed.
   NOTE: You may need to log in to Encompass LO Connect again by entering your Client ID, User ID, and Password before this screen is displayed.
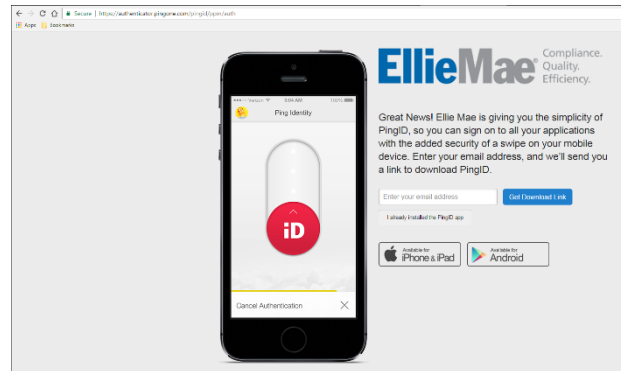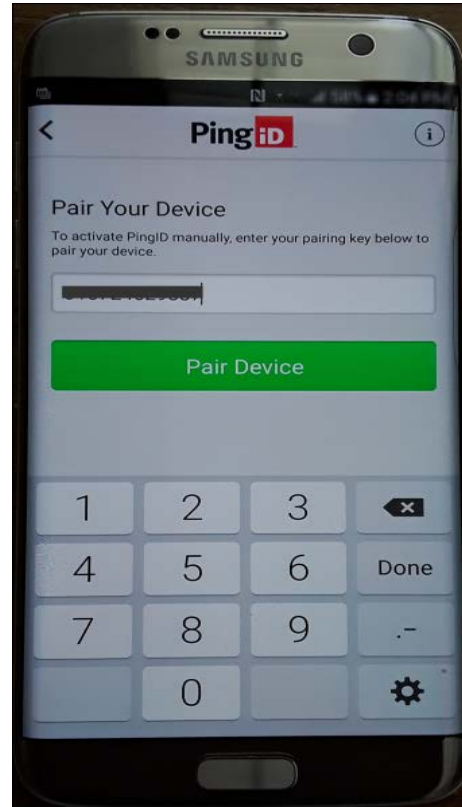

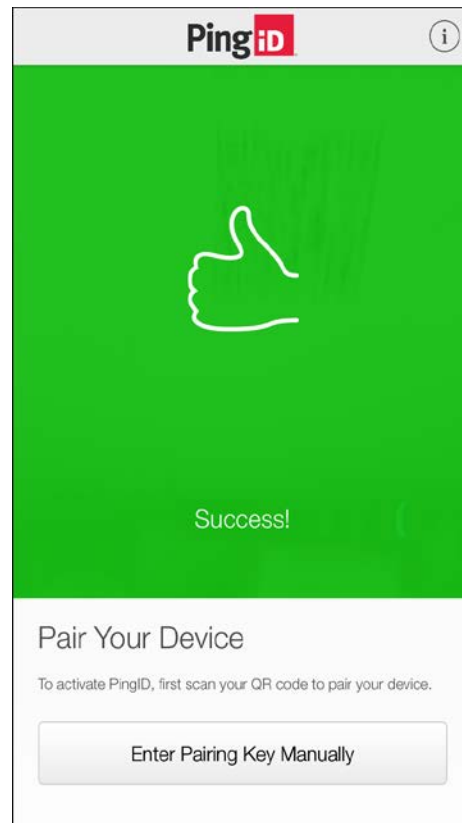2. Click the **I already installed the PingID app** button.
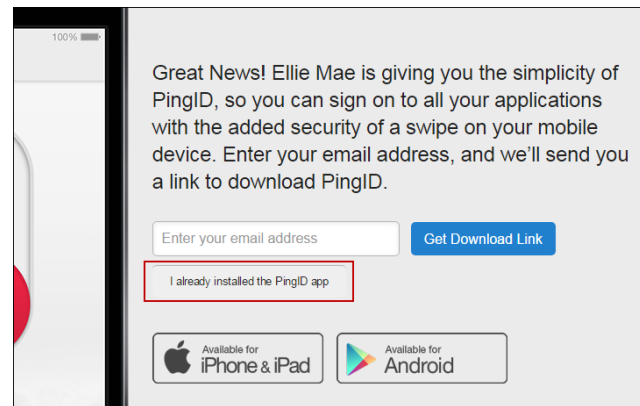
3. Your unique QR code is displayed. On your mobile device, open the PingID app and use the QR code scanner (i.e., your device's camera) to scan the QR code.
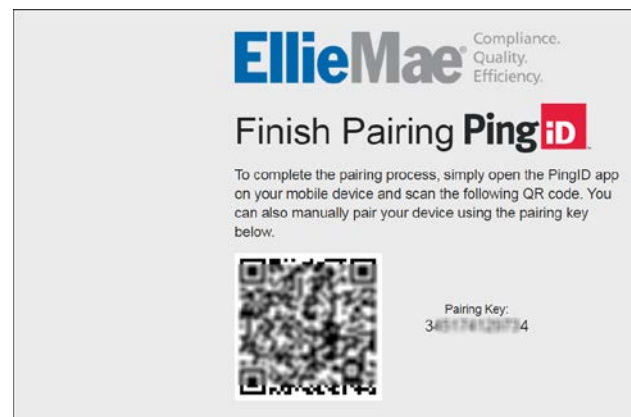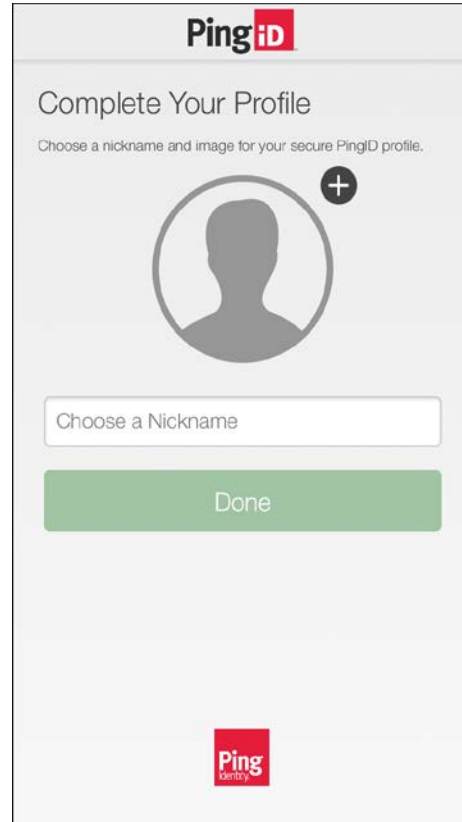
NOTE: *If you prefer, instead of scanning the QR code, tap the* **Enter Pairing Key Manually** *button that is displayed on your mobile device when it's in QR code scanner mode, and then enter the Pairing Key that is displayed next to the QR code on the Finish Pairing PingID screen on your computer. After entering the Pairing Key, tap* **Pair Device**.

You have now successfully paired your device with PingID.

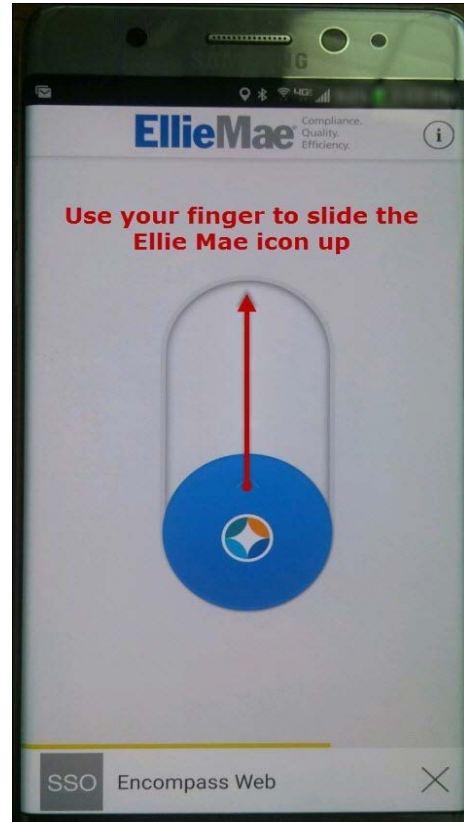4. To complete your profile, you may add a photo (optional) and a nickname (required) to your PingID profile.

- To add a photo, tap the **Plus** sign (+), and then take a new photo or choose an existing photo to add.
- To add a nickname, tap the **Choose a Nickname** field, enter a nickname, and then tap **Done**.
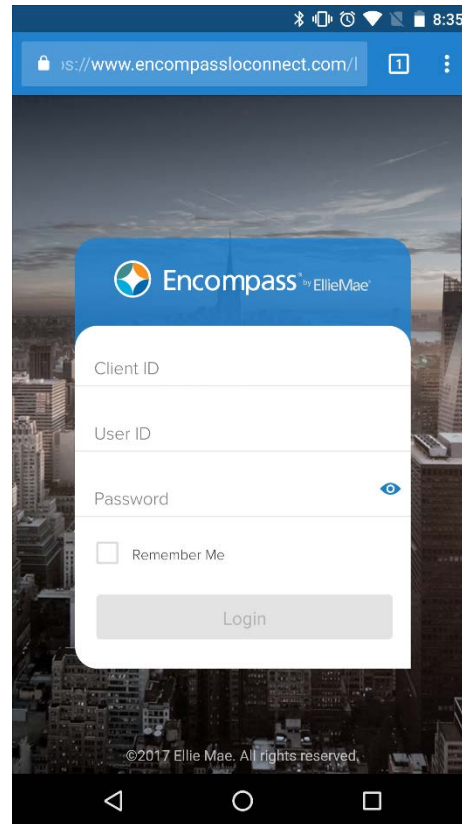
- Here you are presented with an Encompass slider. Use your finger to slide the Encompass logo up towards the top of the screen.
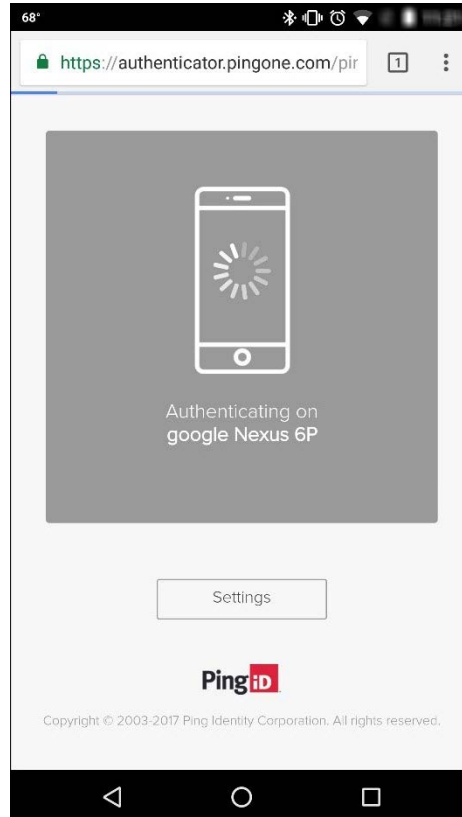
  Once you slide the logo up, your device is authenticated.

- On your mobile device, open the Chrome browser, and then navigate to the Encompass LO Connect log in page: http://www.encompassloconnect.com
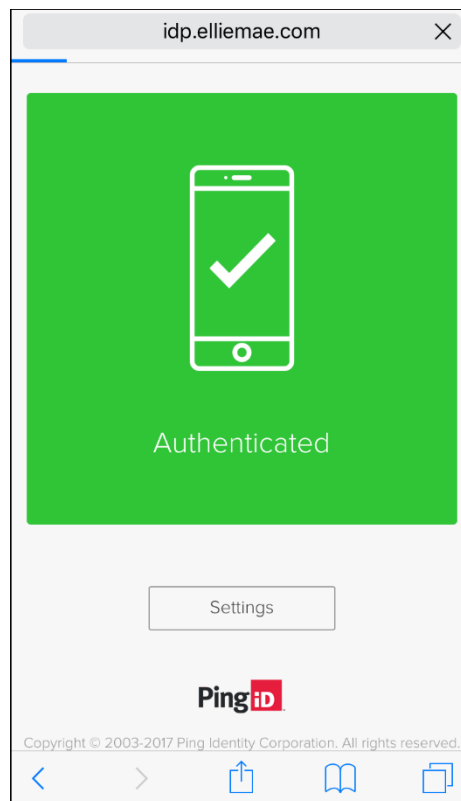- Enter your Client ID, User ID, and Password, and then tap **Login**.

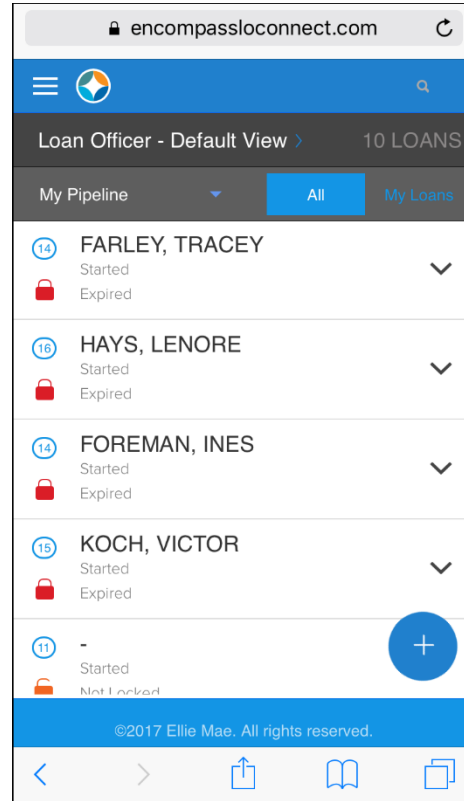Your device is checked for authentication.

The PingID application opens on the mobile device and you are presented with an Encompass slider. Use your finger to slide the Encompass logo up towards the top of the screen. Once you slide the logo up, your device is authenticated.

Your device is now authenticated.

You are automatically routed to the Encompass LO Connect Pipeline.

## Pairing using your mobile device and a Computer (with email)

From this screen you have the choice pair your device by scanning a QR code or by manually entering a pairing key.

1. On your computer (not your mobile device), open your browser and navigate to http://www.encompassloconnect.com. The PingID authenticator screen is displayed.
NOTE: You may need to log in to Encompass LO Connect again by entering your Client ID, User ID, and Password before this screen is displayed.
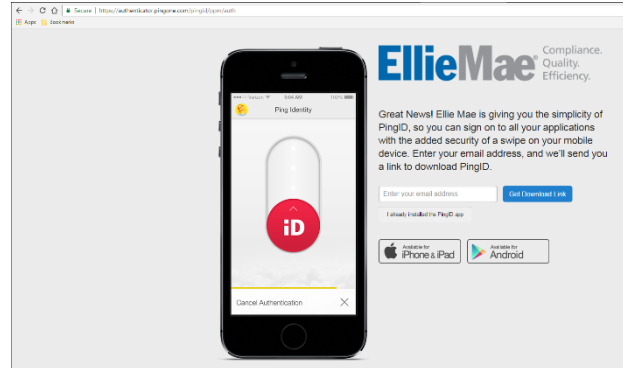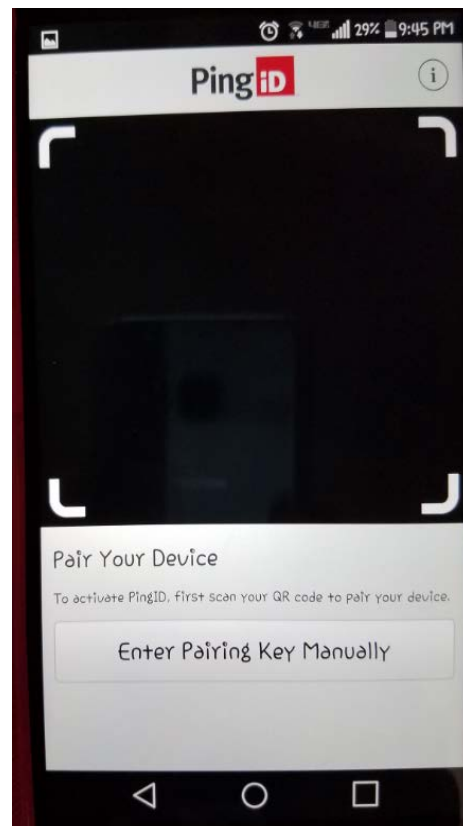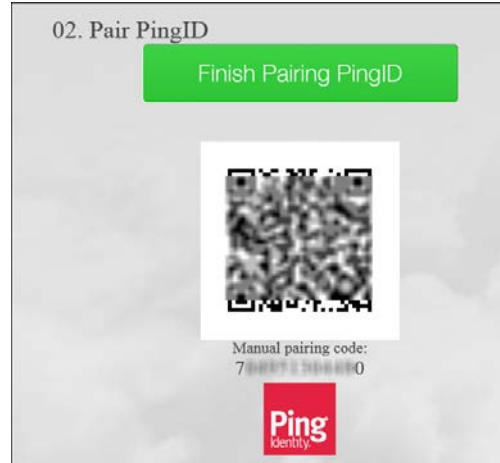
2. Enter your email address, and then click the **Get Download Link** button.
   - An email is sent to your email address. Go to your Inbox and open the email. (The subject line is *Welcome to PingID*).
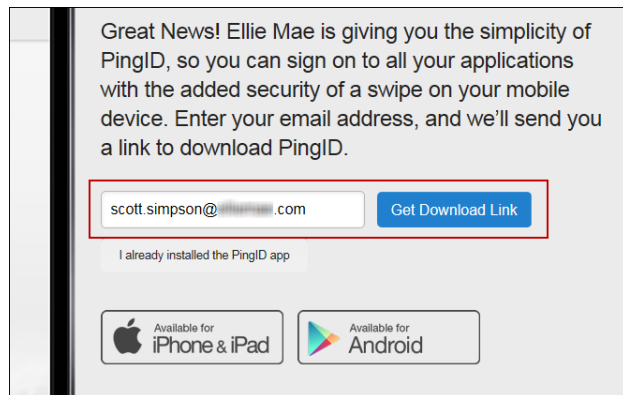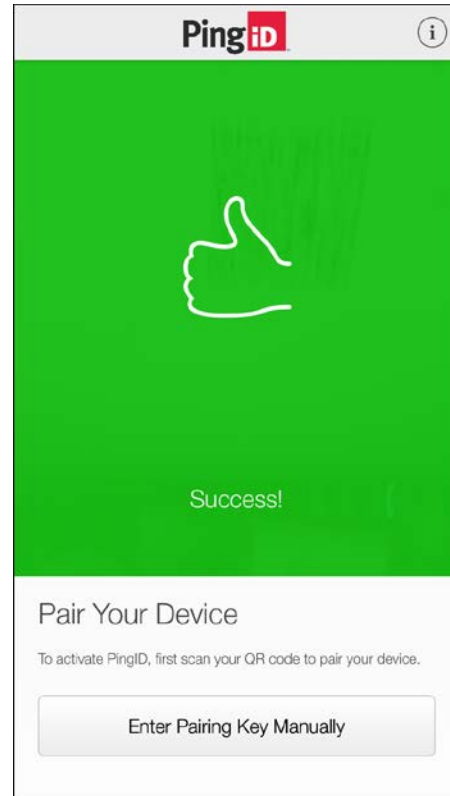
3. Your unique QR code is displayed in the body of the email. On your mobile device, open the PingID app and use the QR code scanner (i.e., your device's camera) to scan the QR code.
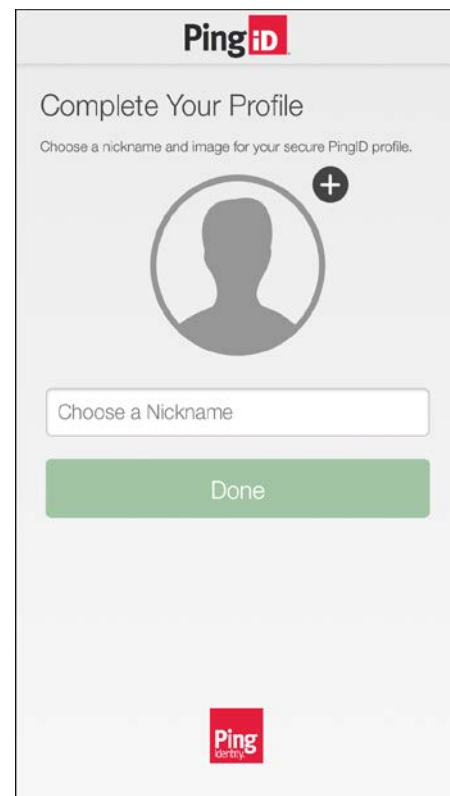
Installing and Pairing PingID   *page 16*

NOTE: *If you prefer, instead of scanning the QR code, tap the* **Enter Pairing Key Manually** *button on your mobile device, and then enter the Manual pairing code that is displayed under the QR code in the email. After entering the Pairing Key, tap* **Pair Device***.*
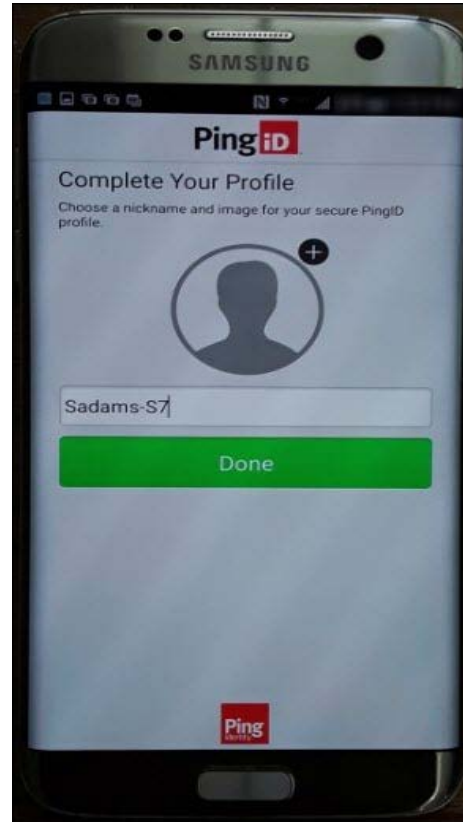
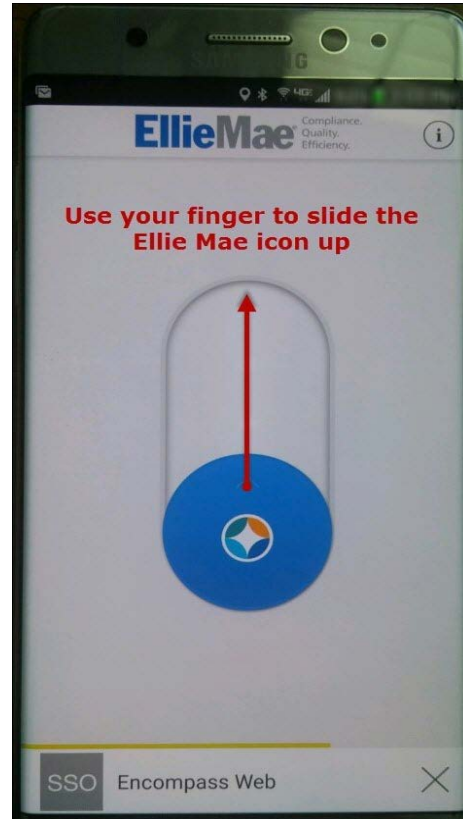You have now successfully paired your device
with PingID.

4. To complete your profile, you may add a
   photo (optional) and a nickname (required)
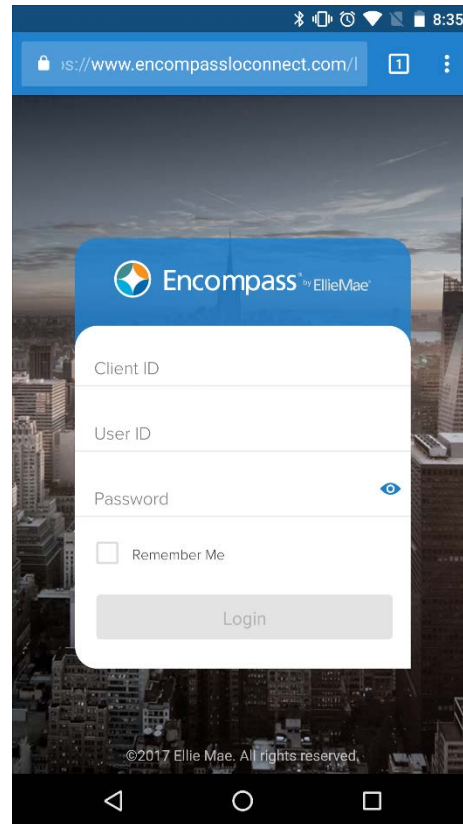   to your PingID profile.

- To add a photo, tap the **Plus** sign (+), and then take a new photo or choose an existing photo to add.
- To add a nickname, tap the **Choose a Nickname** field, enter a nickname, and then tap **Done**.
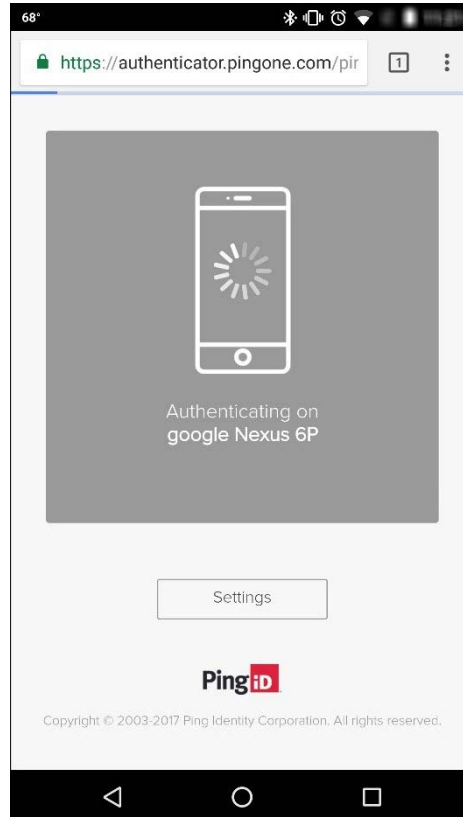

5. Here you are presented with an Encompass slider. Use your finger to slide the Encompass logo up towards the top of the screen. Once you slide the logo up, your device is authenticated.

- On your mobile device, open the Chrome browser, and then navigate to the Encompass LO Connect log in page: http://www.encompassloconnect.com
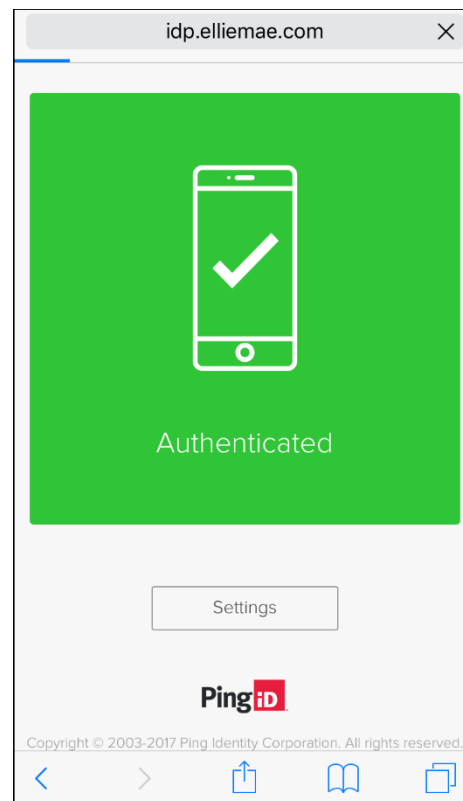 - Enter your Client ID, User ID, and Password, and then tap **Login**.

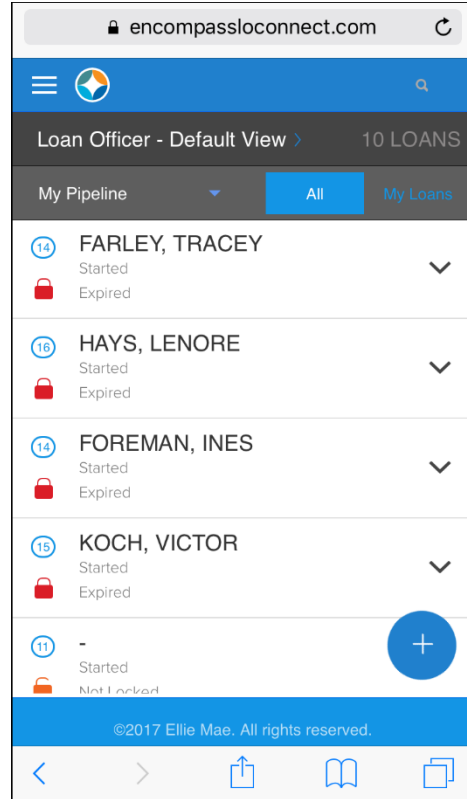Your device is checked for authentication.

The PingID application opens on the mobile device and you are presented with an Encompass slider. Use your finger to slide the Encompass logo up towards the top of the screen. Once you slide the logo up, your device is authenticated.

Your device is now authenticated.

You are automatically routed to the Encompass LO Connect Pipeline.

## Pairing using your mobile device only (no email)

From this screen you will copy and paste or manually enter a pairing key to pair your mobile device.

1. On your mobile device, open the Chrome browser and navigate to http://www.encompassloconnect.com. The PingID authenticator screen is displayed.
*NOTE: You may need to log in to Encompass LO Connect again by entering your Client ID, User ID, and Password before this screen is displayed.*
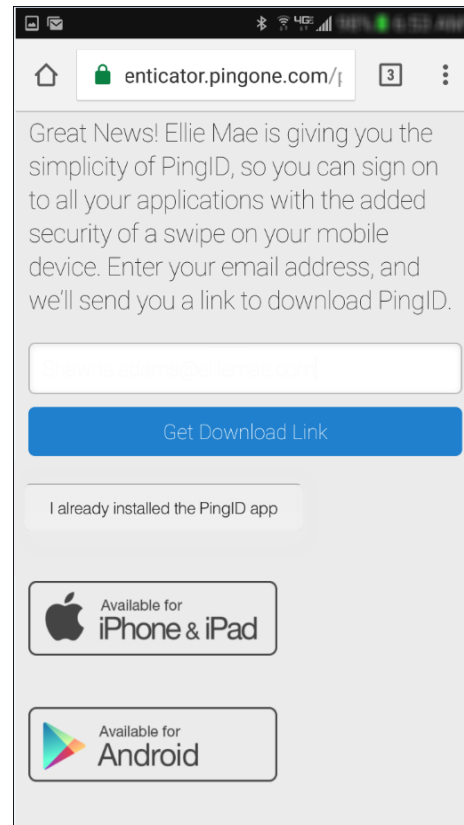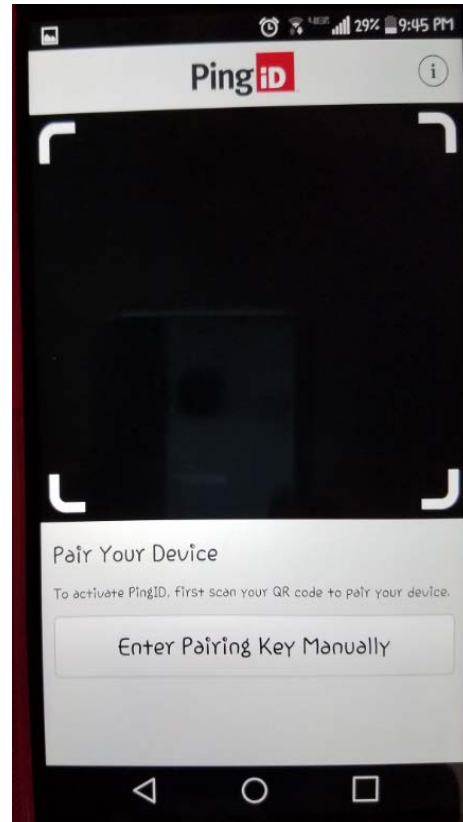
2. Tap the **I already installed the PingID app** button.
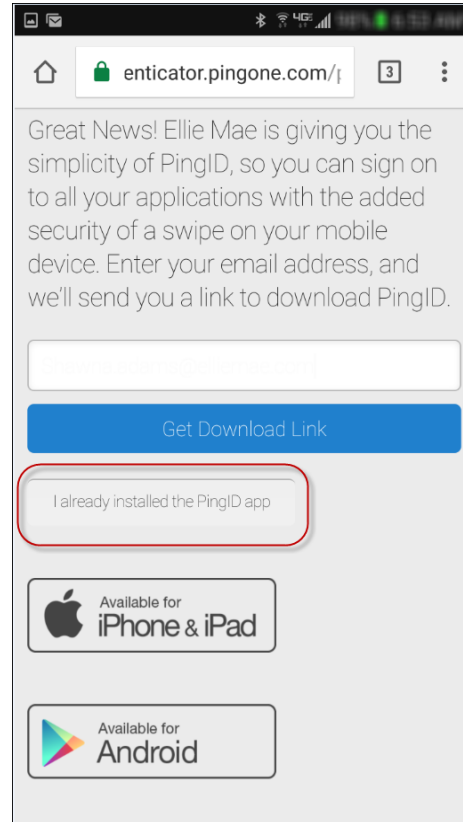
3. On the Finish Pairing PingID screen, your unique Pairing Key is displayed. Either write down this Pairing Key or tap once, steadily on the Pairing Key until the Copy option pops-up.
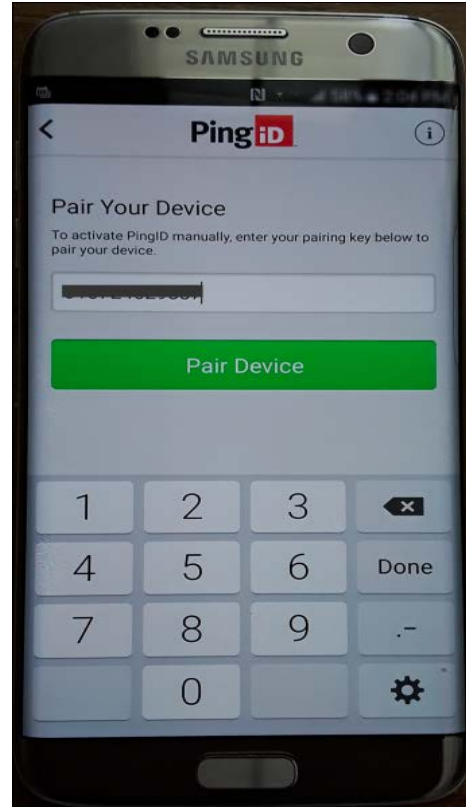4. Tap **Copy**.
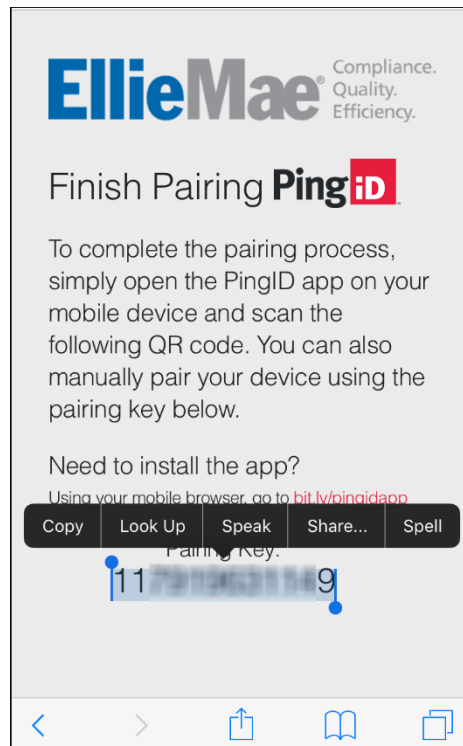
5. On your mobile device, open the PingID app.
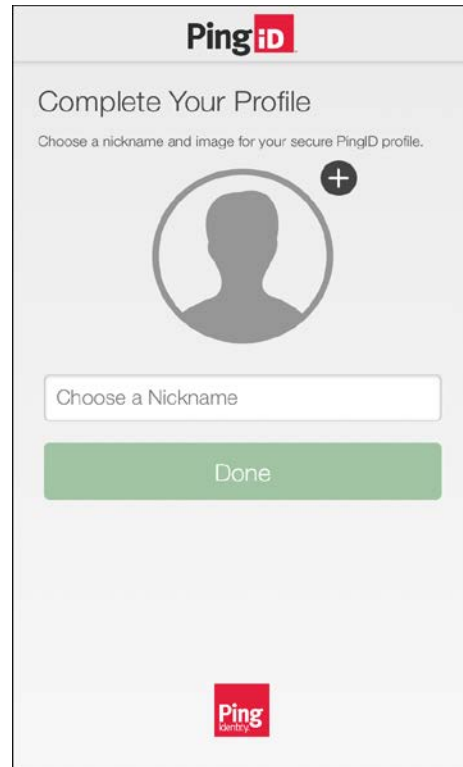6. Tap the **Enter Pairing Key Manually** button on your mobile device.

7. Manually enter the Pairing Key or tap once, steadily on the entry field until the Paste option pops-up. Tap **Paste** to paste the Pairing Key in the field.
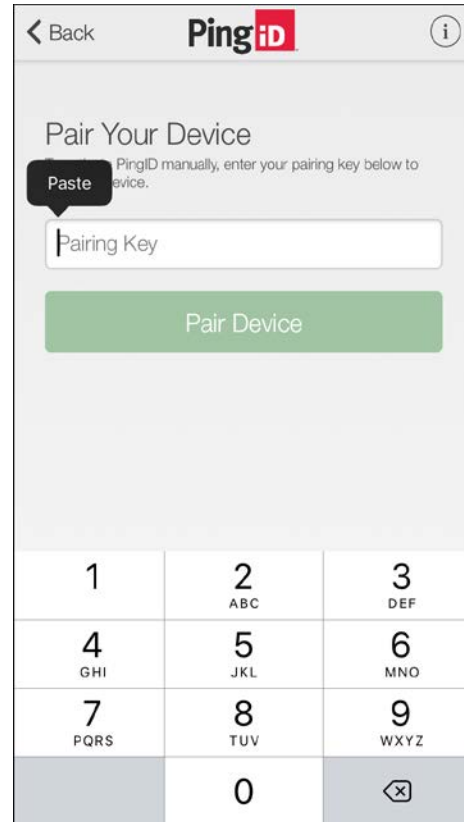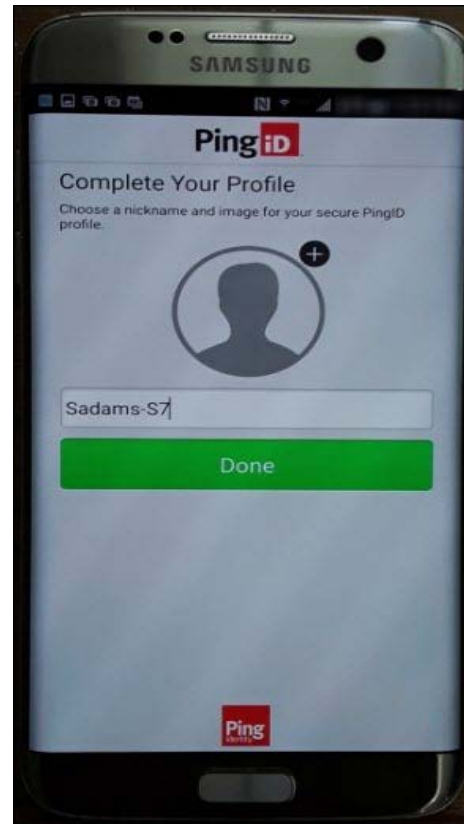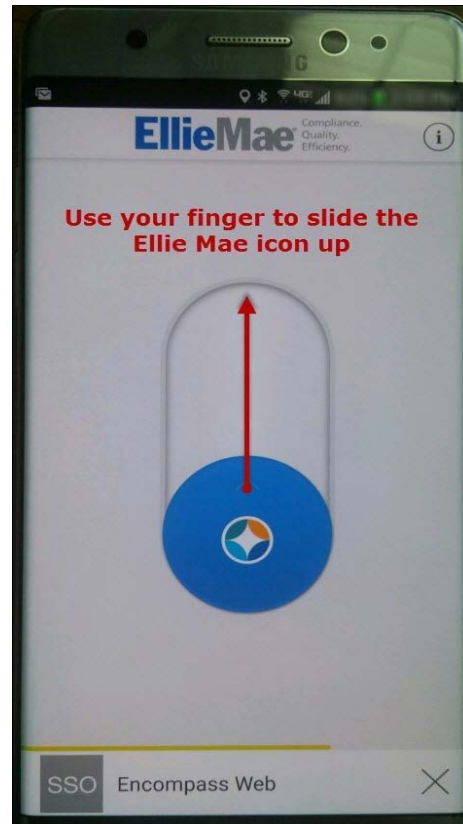
8. Tap **Pair Device**.

9. To complete your profile, you may add a photo (optional) and a nickname (required) to your PingID profile.
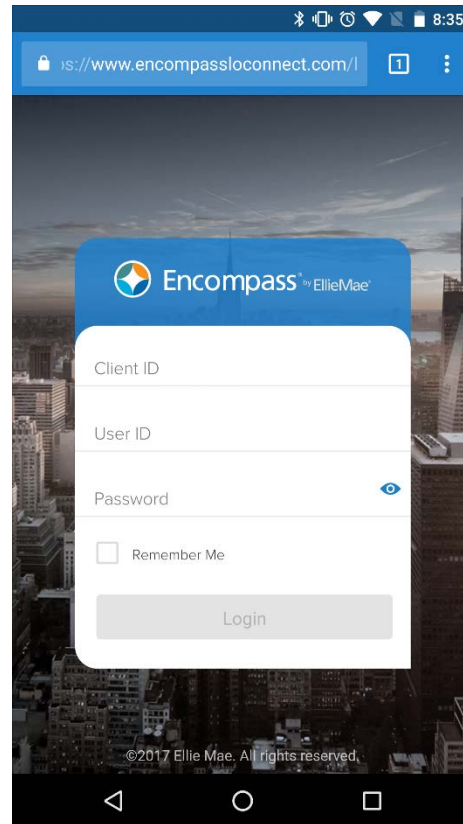
- To add a photo, tap the **Plus** sign (+), and then take a new photo or choose an existing photo to add.
- To add a nickname, tap the **Choose a Nickname** field, enter a nickname, and then tap **Done**.
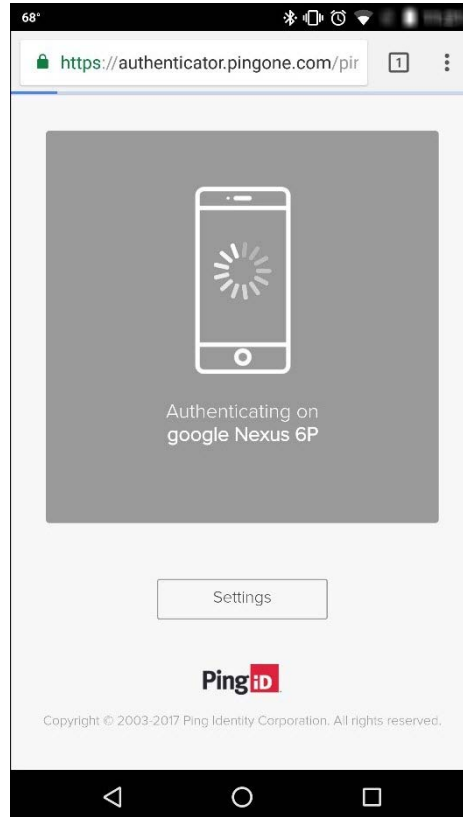
- Here you are presented with an Encompass slider. Use your finger to slide the Encompass logo up towards the top of the screen. Once you slide the logo up, your device is authenticated.

- On your mobile device, open the Chrome browser, and then navigate to the Encompass LO Connect log in page: http://www.encompassloconnect.com
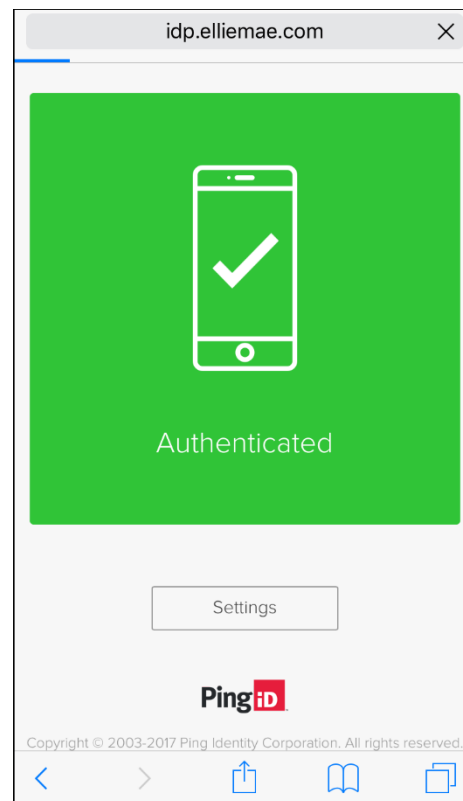- Enter your Client ID, User ID, and Password, and then tap **Login**.

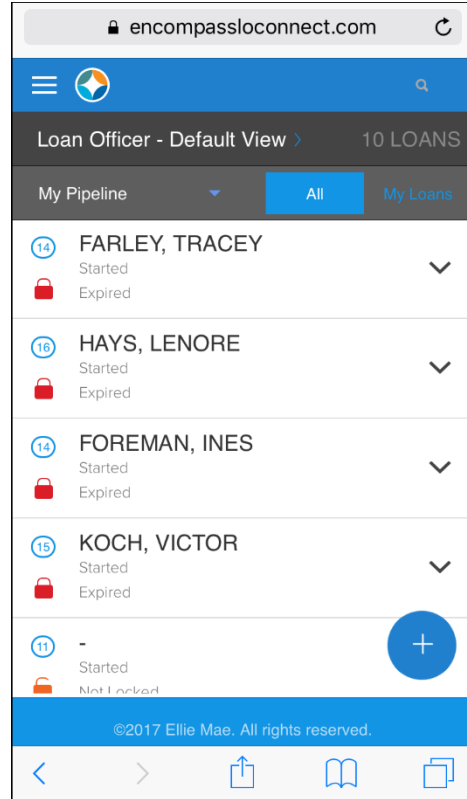Your device is checked for authentication.

The PingID application opens on the mobile device and you are presented with an Encompass slider. Use your finger to slide the Encompass logo up towards the top of the screen. Once you slide the logo up, your device is authenticated.

Your device is now authenticated.

You are automatically routed to the Encompass
LO Connect Pipeline.

## Pairing using your mobile device Only (with email)

From this screen you will copy and paste or manually enter a pairing key to pair your mobile device.

1. On your mobile device), open your Chrome browser and navigate to http://www.encompassloconnect.com. The PingID authenticator screen is displayed.

NOTE: You may need to log in to Encompass LO Connect again by entering your Client ID, User ID, and Password before this screen is displayed.
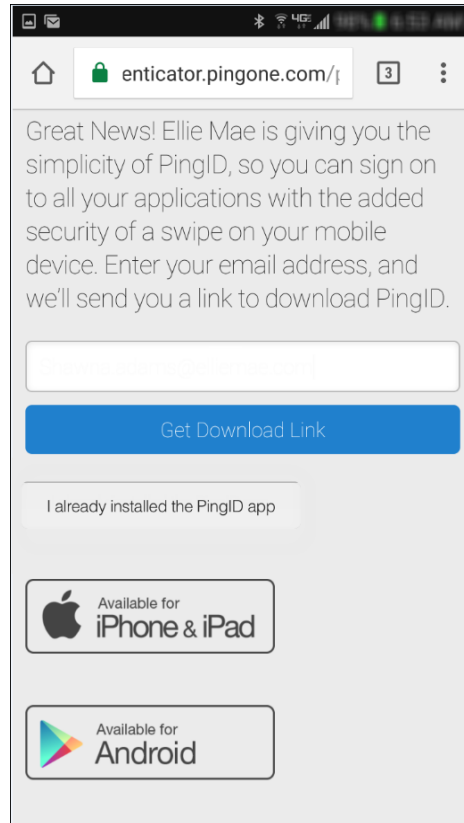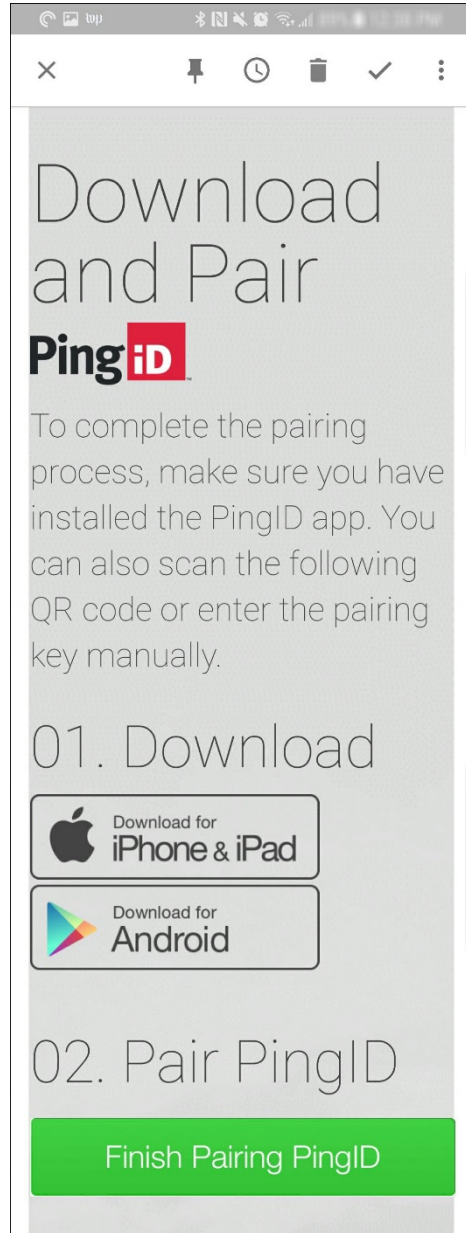
2. Enter your email address, and then tap the **Get Download Link** button.
   - An email is sent to your email address.
   - Go to your Inbox and open the email on your mobile device. (The subject line is *Welcome to PingID*).
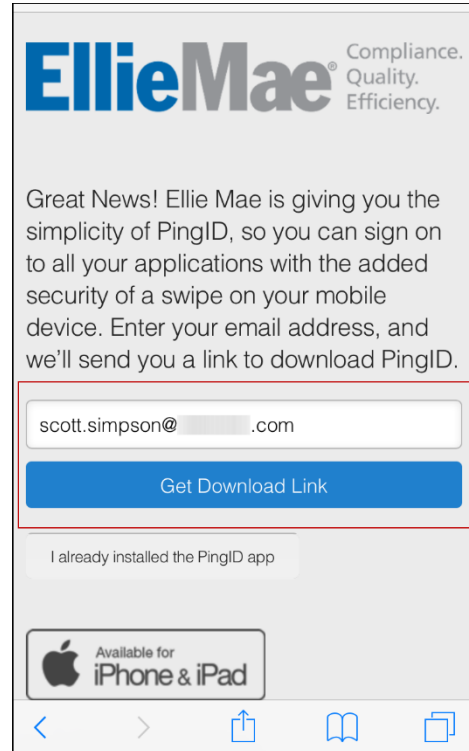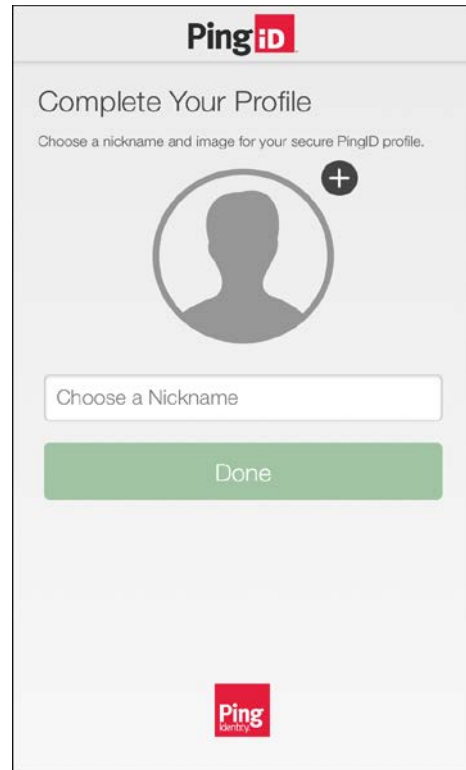
3. In the body of the email, tap the green **Finish Pairing PingID** button. If prompted with an *Open with* dialogue window, select the PingID application.

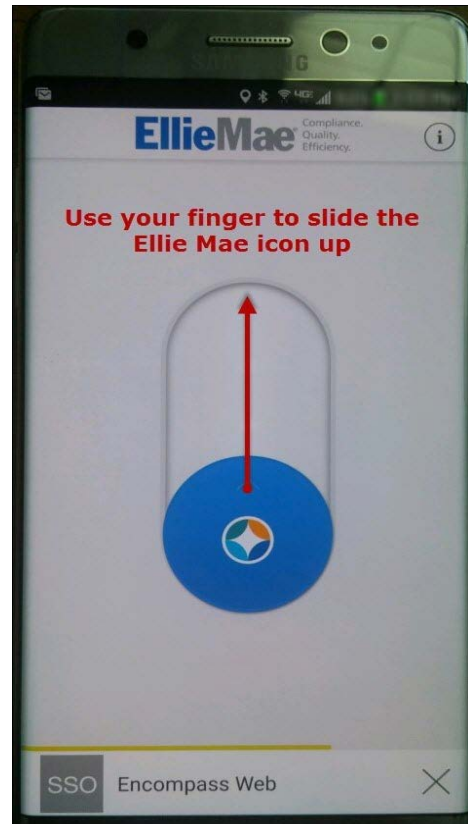You have now successfully paired your device with PingID.

4. To complete your profile, you may add a photo (optional) and a nickname (required) to your PingID profile.

- To add a photo, tap the **Plus** sign (+), and then take a new photo or choose an existing photo to add.
- To add a nickname, tap the **Choose a Nickname** field, enter a nickname, and then tap **Done**.

5. Here you are presented with an Encompass slider. Use your finger to slide the Encompass logo up towards the top of the screen. Once you slide the logo up, your device is authenticated.

You are automatically routed to the Encompass LO Connect Pipeline.