

Ellie Mae®

COMPANY WEBSITE

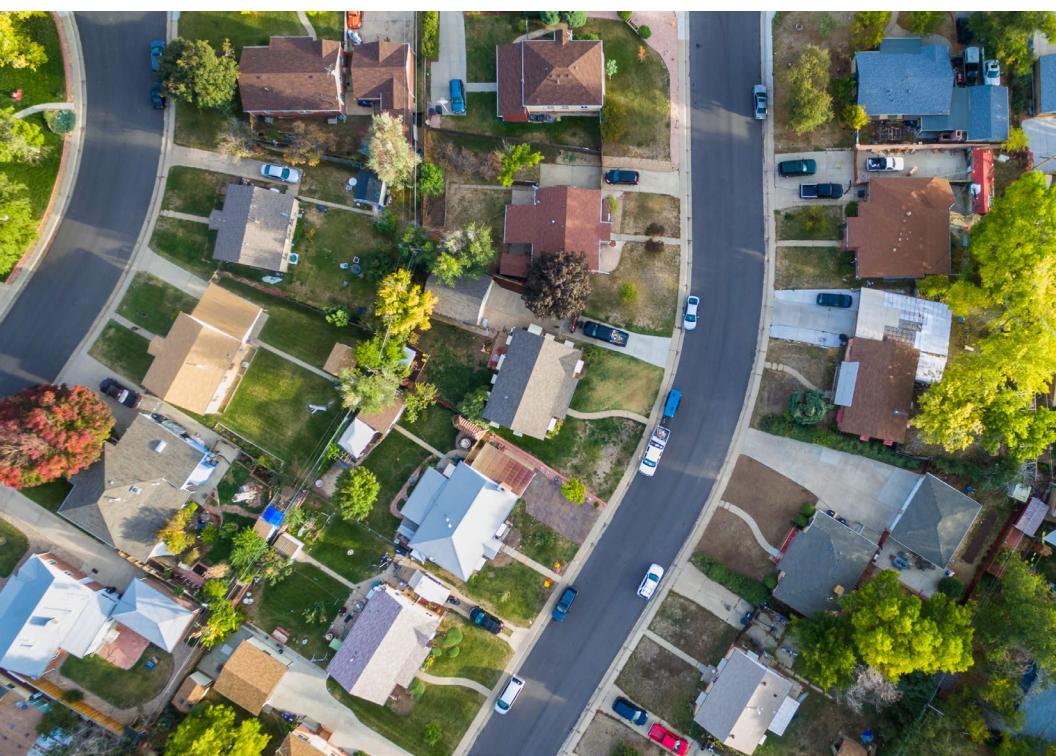
www.elliemae.com

LOCATION

Pleasanton, CA

INDUSTRY

Software | Residential Mortgage



Ellie Mae, Leading Cloud-Based Solutions Innovator for the Mortgage Finance Industry, Streamlines Delivery of Modern HTML5-Based Online Help Using MadCap Flare

GOALS

- Modernize online Help by producing an HTML5-based website featuring top navigation and a responsive design that adapts to users' screens—from desktops and notebooks to mobile phones and tablets.
- Streamline the development and delivery of Ellie Mae's documentation to multiple outputs by standardizing on one tool for single-source, multi-channel publishing.
- Make it easier and more intuitive for users to navigate and find the information they need.

SOLUTIONS

- MadCap Flare native XML single-source, multi-channel content authoring software.

BENEFITS

- **Efficiency** — MadCap Flare's topic-based authoring and single-source publishing simplify the creation and delivery of a comprehensive online Help system plus supporting PDFs—cutting the time to make updates from days to minutes.
- **Easy Customization** — Variables, conditional tags, and cascading style sheets in MadCap Flare enable Ellie Mae to customize content and graphics for different customer groups and product versions.
- **Intuitive User Experience** — MadCap Flare's ability to produce HTML5-based Help with responsive design, top navigation, and embedded videos creates a modern, intuitive web experience.
- **Easy Navigation** — Frameless HTML5 output and drop-down text in MadCap Flare allow users to easily navigate through the documentation and find the information they need.

Ellie Mae is the leading cloud-based solution provider for the mortgage finance industry. Ellie Mae's technology solutions enable lenders to originate more loans, reduce origination costs, and shorten the time to close, all while ensuring the highest levels of compliance, quality and efficiency. The mission to automate everything automatable for the residential mortgage industry is the guiding force behind the company's flagship product Encompass®, an all-in-one, fully integrated mortgage management solution that covers the entire loan lifecycle. It provides one system of record, keeping data secure and documentation accurate.

To help customers optimize their use of the Encompass solution, Ellie Mae delivers a range of product documentation. Today, the company relies on MadCap Flare's single-source, multi-channel publishing capabilities to deliver this information both as PDFs and as responsive HTML5 Help that automatically adjusts to users' screens, from desktops to mobile devices.

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Goal: Streamline Documentation Delivery

For years, Ellie Mae used a combination of MadCap Flare, Adobe® FrameMaker and Microsoft® Word to produce its online Help and PDF-based documentation. However, maintaining content in three different places was redundant and inefficient.

"We were working with multiple Word and FrameMaker files, which were essentially the same information that we had in Flare, and it was confusing trying to manage them all," recalled Scott Simpson, director of technical publications at Ellie Mae. "It was extremely time-intensive to manually edit these files for each product release, and it became clear that we needed to move to single-source publishing of our documentation as multiple outputs."

At the same time, the technical writing team wanted to revamp the company's Help system to look less like traditional, standalone documentation, as well as unify all of their content in one place to make it easier for customers to navigate. When the team learned of the new frameless top navigation feature available with MadCap Flare 11, they saw an opportunity to move from their traditional tripane Help and produce a new online Help system that looked like a modern website.

"Since we were redesigning our Help, it was also time to reevaluate the tools we were using," Simpson explained. "We engaged with a MadCap consultant to learn more about the features that came with the latest version of Flare, and it checked off all of our requirements, including single sourcing and top navigation. We decided it would be more efficient to move away from using three tools and just rely on Flare for our authoring and publishing needs."

Single-Source Publishing with MadCap Flare

Today, Ellie Mae provides customers with a comprehensive HTML5-based Help website containing documentation on how to effectively use its flagship product, Encompass. From this main site, users can access additional Help systems for over 20 of the company's other products, many of which are linked to one another for easy navigation. Additionally, the website provides links to PDF and video files that complement the web content.

By taking advantage of MadCap Flare's topic-based single-source publishing, Ellie Mae's writers have been able to significantly speed the process of creating and delivering content.

"Being able to publish to multiple outputs from a single source with Flare has been the biggest benefit for our writers," Simpson noted. "Because we can now store, develop, and edit content centrally in a single Flare project, we're able to reuse content that's similar across different products, as well as prevent duplicate information and ensure consistency."

The ability to create and publish content in one place instead of using three different tools, has also simplified the process of updating documentation for new product releases. Now, the writers can just make one update, build targets for the different outputs, and then generate those outputs with the click of a button.



The overall process is just so much more efficient using Flare; what used to take days at a time can now be completed in a matter of minutes. This is a huge plus since we have to maintain both our new and existing documentation.

SCOTT SIMPSON

Director, Technical Publications | Ellie Mae

"We're able to update information more quickly across multiple outputs at the same time, which has helped us to drastically cut down project time," Simpson observed. "The overall process is just so much more efficient using Flare; what used to take days at a time can now be completed in a matter of minutes. This is a huge plus since we have to maintain both our new and existing documentation."

Fostering Content Reuse and Customization

Ellie Mae has also gained significant efficiencies through the extensive use of snippets, variables, and conditional tags in MadCap Flare.

"Since a lot of our products are add-ons for our Encompass solution and therefore share similar content, the ability to use snippets in Flare allows us to maximize content reuse and eliminate redundant efforts," Simpson said. "It's a huge time-saver since we don't have to worry about manually retyping the content for all the different Help systems."

The team also relies on variables to automate changes for different versions of the company's printed material.

"Although product release notes are HTML5-based, we still want to provide users the option of accessing them via PDFs," Simpson explained. "Being able to automate changes via variables in Flare has helped us to produce all these different outputs with consistency and minimal effort."

Meanwhile, Ellie Mae takes advantage of conditional tags to customize content for two different versions of its Encompass product: one for bankers and another for brokers. Previously, the technical writers had to maintain separate Help systems and guides for the two different audiences since there was different content related to each group's particular business processes. By using conditional tags, the team can now change specific sections of the documentation to tailor them to the different product versions.

"Flare makes it so easy for us to apply conditions so that, depending on the types of users accessing the documentation, they can choose if they want the broker or banker edition, and the content will adjust to only show what's applicable to them," Simpson explained. "It's been a real help in streamlining our processes."

Top Navigation and Responsive Design for a Modern Web Experience

For Ellie Mae's customers, the most dramatic difference is the modern web experience provided by the redesigned online Help system, which features top navigation and a responsive design.

The screenshot shows the homepage of the Encompass Help website. At the top, there's a header with the Encompass logo and a search bar. Below the header is a large orange banner with the title "Encompass Help" and a subtitle "Everything you need to know to successfully set up and use Encompass". There are two buttons: "Get Started" and "What's New?". To the right of the banner is a decorative graphic of speech bubbles containing icons for search, communication, and system management. Below the banner are four main categories: "Release Notes", "Quick Reference Guides", "Videos", and "Guides & Documents", each with a brief description and an icon. At the bottom of the page is a copyright notice for 2017, mentioning various Ellie Mae trademarks.

Welcome Page of HTML5-based Help Site for Encompass



Using Flare, we were able to move away from the traditional tripane format of online Help to the frameless top navigation output for HTML5. As a result, our Help website now features a cleaner, state-of-the-art web layout.

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Director, Technical Publications | Ellie Mae

"Using Flare, we were able to move away from the traditional tripane format of online Help to the frameless top navigation output for HTML5," Simpson noted. "As a result, our Help website now features a cleaner, state-of-the-art web layout, creating a more intuitive and consistent experience for users."

Additionally, the use of top navigation has helped the writers to consolidate information so that there's no longer repeated content in different places. This has helped customers to locate information more quickly.

The screenshot shows the Encompass by Ellie Mae product release notes for Version 17.3. The top navigation bar includes links for Release Notes, Get Started, Loans, Features, Additional Info, and Settings. A search bar is also present. The main content area features a section titled "Feature Enhancements in Version 17.3" with a link to a PDF version. Below this, there is a section for "Support for FHA 203(k) Loans" with a callout box explaining why the update was made. The sidebar on the right lists various release notes and other resources.

Why we made this update: This update provides a more streamlined user interface to facilitate data entry of 203(k) purchase and refinance scenarios into the FHA's mandated 203(k) calculator. These updates also provide lender control over updates to prior closed loan data.

- + Updates to the FHA 203k Tab on the FHA Management Form
- + New Fields Added to the FHA 203k Tab on the FHA Management Input Form
- Pop-up Window for Existing Debt Added to FHA Management Form for FHA 203(k) Refinance Loans

Updates have been made to Step 2a on the **FHA 203(k)** tab in the FHA Management form to enable users to enter data that will be used to calculate the existing debt amount for entry on the FHA Connection website. Previously the field for the existing debt (field ID 3052) was a calculated value based on data entered in the loan file. Field 3052 has been replaced by a new field for the existing debt (field ID MAX23K.X132), which is now used instead of field 3052 in calculations that include the existing debt amount.

The new existing debt field is populated based on data entered in a new 203K Existing Debt pop-up window, which is accessed by clicking a new **Edit** icon that has been added in Step 2A.

Step 2: Establishing Value

Adjusted As-Is Value	\$ 350.00
A. Existing Debt on property being refinanced	
B. Total Rehabilitation Costs, Fees and Reserves (Step 1 Total)	

Product Release Notes Created with MadCap Flare

The screenshot shows the Encompass by Ellie Mae custom print forms page. The top navigation bar includes links for Release Notes, Get Started, Loans, Features, Additional Info, and Settings. A search bar is also present. The main content area features a section titled "Custom Print Forms" with a "Watch the Custom Forms Tutorial" button. The sidebar on the right lists various custom print form options.

Custom Print Forms

Watch the Custom Forms Tutorial

Use the Custom Print Forms tool to create custom templates for forms, letters, and other documents. You can include references to fields such as Borrower Last Name, Loan Number, and Loan Amount, so that the appropriate loan-specific values are automatically added to the printed form.

To create a custom print form, you can start a new form, copy an existing custom form, or import .doc or .rtf formatted forms from Calyx Point or other sources.

Note: The Custom Print Forms feature does not support the use of variable fields within text boxes.

About public and personal print forms

To Create a New Form:

- On the menu bar, click **Encompass**, and then click **Settings**.
- On the left panel, click **Loan Setup**, and then click **Custom Print Forms**.
- On the Custom Print Forms setting, select the **Public** or **Personal** folder in which you want to add the custom form.
- Click the **New** icon, type the name of the custom form, and then (with the new form selected) click the **Edit** icon.
 - Microsoft Word and the Insert Fields window open.
- Create the form content, layout, and formatting as required.
- Use the Insert Fields window to add variable fields as follows:
 - Select the type of field you want to add from the Category list.
 - Select the name of the field from the Field Name list.
 - Click **Insert** to add the field to the form.

Example of Topic in HTML5 Top Navigation Output



Flare's HTML5 responsive design functionality provides users the flexibility to access content in their format of choice, which is important given the increasing number of people that use mobile devices.

SCOTT SIMPSON
Director, Technical Publications | Ellie Mae

"Users love having the option to use HTML; it's a lot easier to search than trying to navigate through PDF files," Simpson said. "In the past, if they wanted to find something in the release notes, they'd have to open every single PDF and look through all the content. Now, no matter where they are on the website, they can just type a particular term in the search bar and it'll show up. It's been a huge benefit of switching to top navigation with Flare."

Also popular with customers is the responsive design of Ellie Mae's online Help, which can automatically adjust to users' different screens—from desktops, to notebooks, tablets and smart phones.

"Flare's HTML5 responsive design functionality provides users the flexibility to access content in their format of choice, which is important given the increasing number of people that use mobile devices rather than their desktops or laptops to access the Internet," Simpson explained. "Also, it's great that Flare's responsive design functionality aligns with our desire to roll out more mobile-specific product offerings and move to a more agile design."

Visually Enhancing Online Help

Ellie Mae's technical writers rely on additional features in MadCap Flare to enhance the user experience and improve access to information. Among these features are drop-down text, cascading style sheets (CSS), and multimedia support.

"The ability to expand and collapse a section of content with Flare has made it significantly easier for users to scan for more information," said Simpson. "In the past, it was overwhelming for users to scroll through all of the content just to find the topic they were looking for. Now, when they click on a heading or title, the text expands, and they can quickly jump to their desired content."

Meanwhile, the team takes advantage of cascading style sheets (CSS) in MadCap Flare to align more closely with the corporate branding standards on Ellie Mae's website.

"Now with CSS, users don't feel like they're going to a completely different area when looking for Help," Simpson observed. "The content has a familiar look-and-feel and follows the same path they're used to when they're on other parts of our website."

Additionally, the new Ellie Mae online Help utilizes MadCap Flare's ability to embed videos along with Help topics into the documentation.

"Flare's multimedia support is a great feature that allows us to provide a more interactive, visual learning experience for customers," Simpson explained. "Overall, we've been really happy with the results of using MadCap Flare to reinvent our online Help. It was everything we had hoped for—HTML5 and top navigation has made a world of difference for our customers. Now, any time a professional colleague asks what authoring tool we use, we point them to Flare."

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For more success stories on ways smart companies are increasing productivity, reducing costs, and streamlining content delivery, visit:
www.madcapsoftware.com/successstories



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