

RIMS University: Notice Management

September 26, 2017

Presented by: Greg Crews, VP Product Management

Subject: Notice Management

- Overview

RIMS Notice Management allows Content Administrators to manage the content and recipients of your RIMS generated email notices, as well as the ability to set conditional rules for sending of notices.


- Topics for this session

- Enabling or Disabling Notices
- Adding, Editing or Removing Recipients
- Adding and Editing Content and Subject Lines
- Understanding Events
- Understanding and Using Conditional Rules
- Use Cases
 - *Editing Recipient*
 - *Editing Content and 'Save as New Template'*
 - *Enabling a Scheduled Notice*
 - *Using a Conditional Rule*
- Questions

RIMS Notice Management

How to Enable or Disable a Notice

- As a Content Administrator select Settings and Notice Management
- From the Template Search Filters select Search
- All Notices will be shown
- To Enable a Notice – check the Box in the Active Column
- To Disable a Notice – uncheck the Box in the Active Column



Service Request ▾
Assignments ▾
Reports ▾
Settings ▾
Tools ▾
Help ▾

Projects ▾

Advanced ▾

Home > System Settings > Notice Management

Template Search Filters

Event:

- ALL TYPES -
Additional document uploaded after award
Award gets cancelled
Award is made - losing bids
Award is made - winning bid
Bid Authorization Request
Bid Authorization Response (any/no bid selected)
Bid Authorization Response (with selected bid)

Recipients:

- ALL TYPES -

☒ With or without recipients
☐ With recipients only
☐ Without recipients only

Name:

Default Templates:

☒ Ignore
☐ Default only
☐ Non-default only

Active:













☒ Ignore
☐ Active only
☐ Non-active only

Template Name	Description	Event	Recipients	Version	Active
AWARD (9)					
NM: Award Cancelled (default)	Base template to use when award is cancelled	Award gets cancelled		1.012.0	<input checked="" type="checkbox"/>
NM: Portfolio Award Cancelled (default)	Base template to use when award is cancelled (portfolio only)	Award gets cancelled		2.012.0	<input type="checkbox"/>
NM: Bid Awarded (default)	Base template to use when award is sent	Award is made - winning bid		1.008.0	<input checked="" type="checkbox"/>
Bid Awarded (AO Version) with fee (default)	Base template to use for AO recipient when award is sent	Award is made - winning bid		3.008.0	<input checked="" type="checkbox"/>
NM: Bid Awarded (AO Version) (default)	Base template to use when award is sent (AO Version)	Award is made - winning bid		3.008.0	<input type="checkbox"/>
NM: Portfolio Bid Awarded (default)	Base template to use when award is sent (portfolio only)	Award is made - winning bid		2.008.0	<input type="checkbox"/>

RIMS Notice Management

How to Add a Recipient

- Search for the Notice you wish to change a recipient on
- Click on the person wizard in the recipients column
- From the Edit Recipients page, select the person wizard in the 'Default' Rules Row
- In the Add Recipients pop-up, select the Level, Type, and Recipient and then Save
 - The Recipient will now be listed on the Edit Recipients page





Template Name	Description	Event	Recipients	Version	Active	
AWARD (4)						
NM: Award Cancelled (default)	Base template to use when award is cancelled	Award gets cancelled		1.012.0	<input checked="" type="checkbox"/>	 
NM: Bid Awarded (default)	Base template to use when award is sent	Award is made - winning bid		1.008.0	<input checked="" type="checkbox"/>	 
Bid Awarded (AO Version) with fee (default)	Base template to use for AO recipient when award is sent	Award is made - winning bid		3.008.0	<input checked="" type="checkbox"/>	 
NM: Vendor Bid Regrets (default)	Base template to use to vendors with losing bids when award is sent	Award is made - losing bids		1.009.0	<input checked="" type="checkbox"/>	 



Edit Recipients

Template: **NM: Bid Awarded (v. 1.008.0)**
 Event: **Award is made - winning bid**

Recipients under DEFAULT group will always receive the notice. Apply limitations by moving Recipient under a Rule Group.

Changes to Rule Groups and Rule Items will apply to other templates as well: Since a Rule Group is always composed of at least one Rule Item, removing the only Rule Item in the Rule Group will remove the Rule Group. Removing the Rule Group will remove all Recipients listed under it in all existing templates.

Rules	Actions
DEFAULT	 Add Recipient  Add Rule Item  Edit  Remove

Recipient Type	Recipient	Level	Actions
User By Assignment	Vendor	To	 

Add Recipient

Rule Group: DEFAULT

Level: To

Type: User By Assignment













Recipient: Task - Job Manager

Save Cancel

RIMS Notice Management

How to Remove a Recipient

- Search for the Notice you wish to remove a recipient from
- Click on the person wizard in the recipients column
- From the Edit Recipients page, select the 'X' next to the recipient you wish to remove
- Click Ok to Confirm

Template Name	Description	Event	Recipients	Version	Active	
AWARD (4)						
NM: Award Cancelled (default)	Base template to use when award is cancelled	Award gets cancelled		1.012.0	<input checked="" type="checkbox"/>	 
NM: Bid Awarded (default)	Base template to use when award is sent	Award is made - winning bid		1.008.0	<input checked="" type="checkbox"/>	 
Bid Awarded (AO Version) with fee (default)	Base template to use for AO recipient when award is sent	Award is made - winning bid		3.008.0	<input checked="" type="checkbox"/>	 
NM: Vendor Bid Regrets (default)	Base template to use to vendors with losing bids when award is sent	Award is made - losing bids		1.009.0	<input checked="" type="checkbox"/>	 

Edit Recipients

Template: NM: Bid Awarded (v. 1.008.0)





Event: Award is made - winning bid

Recipients under DEFAULT group will always receive the notice. Apply limitations by moving Recipient under a Rule Group.


Changes to Rule Groups and Rule Items will apply to other templates as well: Since a Rule Group is always composed of at least one Rule Item, removing the only Rule Item in the Rule Group will remove the Rule Group. Removing the Rule Group will remove all Recipients listed under it in all existing templates.





Rules

Actions

 Add Recipient |  Add Rule Item |  Edit |  Remove

DEFAULT

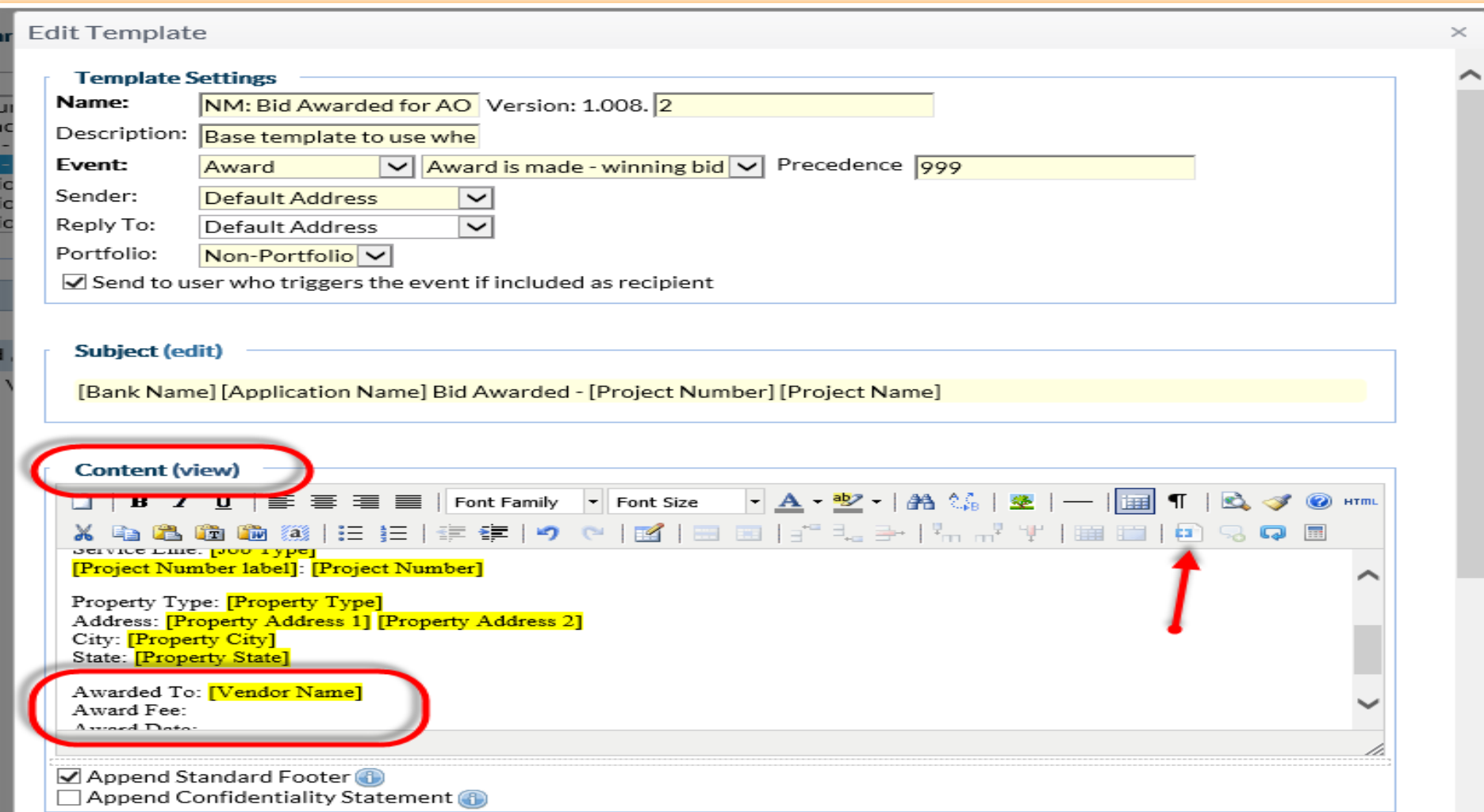


Recipient Type	Recipient	Level	Actions
User By Assignment	Vendor	To	 
User By Assignment	Task - Job Manager	To	 

RIMS Notice Management

How to Add or Edit Subject Lines, Content and Footers

- From the Template Search Filters select Search to see all notices
 - Use the Name, Active Event Filter options to limit this search, if desired
- Select the Edit Pencil to open the notice
- From the Subject or Content select the 'Edit' link
- Edit the text and/or update the smart fields as desired
- Select **Save as New Template**
 - Each Notice must have a Unique Name



Edit Template

Template Settings

Name: NM: Bid Awarded for AO Version: 1.008. 2

Description: Base template to use whe

Event: Award Award is made - winning bid Precedence 999

Sender: Default Address

Reply To: Default Address

Portfolio: Non-Portfolio

☒ Send to user who triggers the event if included as recipient

Subject (edit)

[Bank Name] [Application Name] Bid Awarded - [Project Number] [Project Name]

Content (view)

Service Line: [Project Type]
 [Project Number label]: [Project Number]

Property Type: [Property Type]
 Address: [Property Address 1] [Property Address 2]
 City: [Property City]
 State: [Property State]

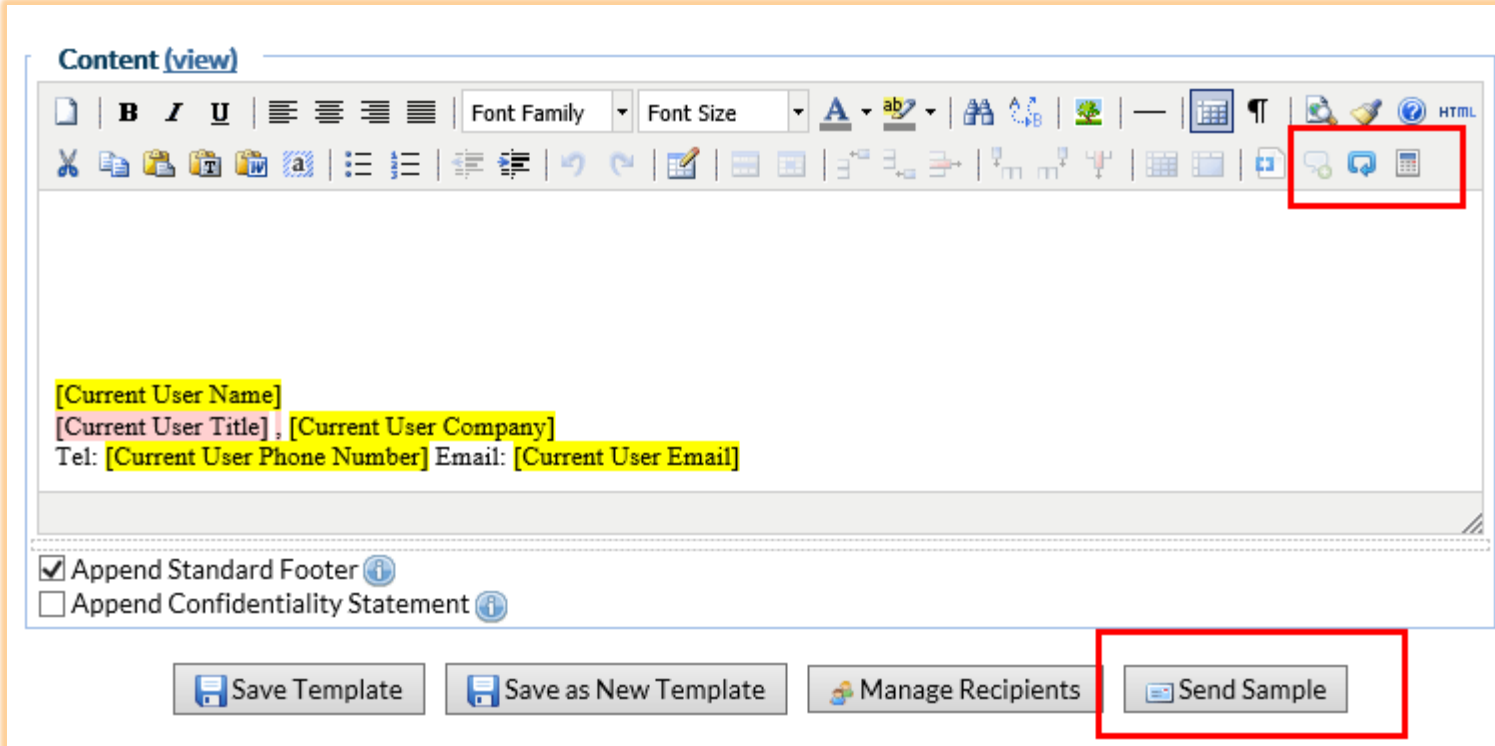
Awarded To: [Vendor Name]
 Award Fee:
 Award Date:

☒ Append Standard Footer
☐ Append Confidentiality Statement

RIMS Notice Management

Additional Features when Editing Content of Notice Templates

- Send Sample
 - Use this feature to send yourself the notice you have edited
 - Be sure to Save before selecting Send Sample
- Inserting Conditional Statements
 - Choose to show a field such as User Title, only when field is present in profile
- Inserting Repeat Containers
 - Choose to bring in information on multiple tasks/jobs or other repeating elements (valuation scenarios)
- Inserting Calculations
 - Choose to display all Fees associated with Job as a Sum Total vs Individual Fees by Task



Content (view)

Font Family Font Size

[Current User Name]
 [Current User Title], [Current User Company]
 Tel: [Current User Phone Number] Email: [Current User Email]





☒ Append Standard Footer
☐ Append Confidentiality Statement

Save Template Save as New Template Manage Recipients **Send Sample**

RIMS Notice Management

Understanding Events

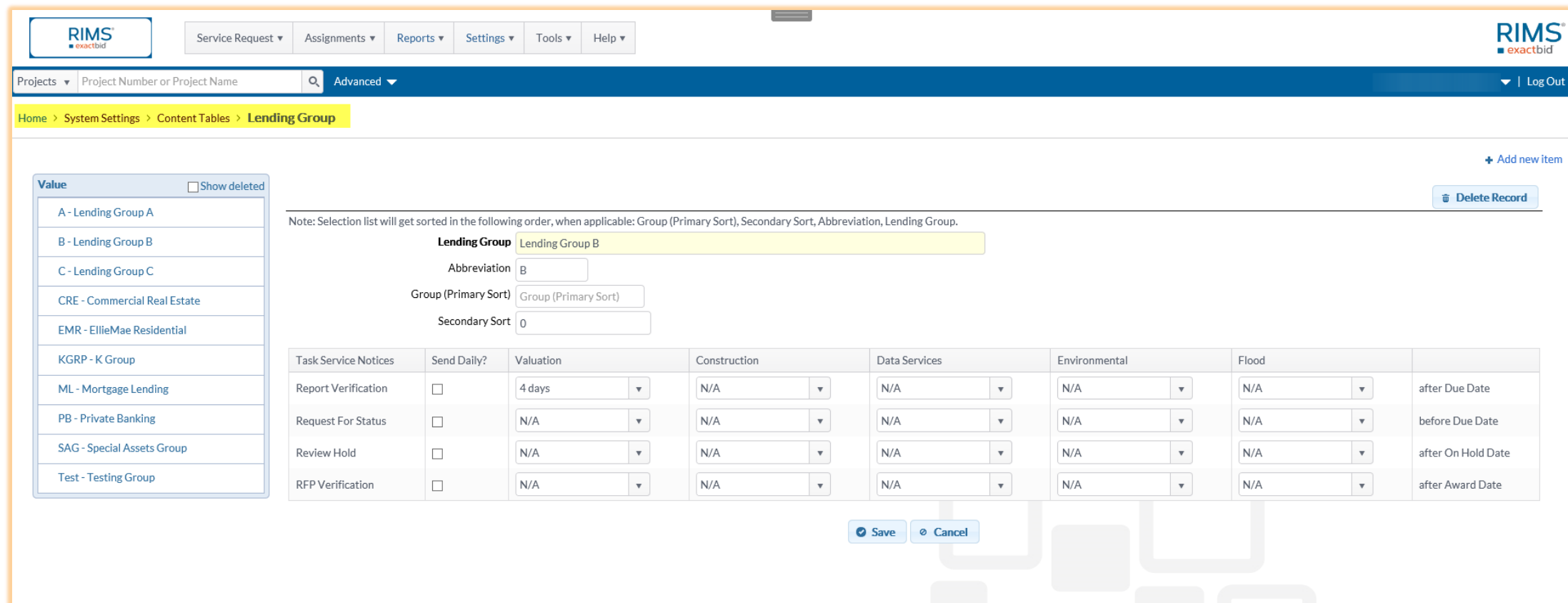
- All Types
 - Notices for Events that occur during an Award, Job, Project, RFP, Service Request and Task status change
 - These follow the typical RIMS Workflow
- Sampling
 - Feature specific
- General
 - Such as Delegation Notices or Disabled User Accounts
- Schedule (or Task Service Notices)
 - Notices to be used for 'status' checks such as Report Verification (Late Report)
 - Will also need to set the Lending Group and Job Type(s) for these to send

Template Name	Description	Event	Recipients	Version	Active	
<div>  SCHEDULE (1) </div>						
NM: Report Verification (default)	Base template to use when a report is late	Report Verification		1.089.0	<input checked="" type="checkbox"/>	 

RIMS Notice Management

Enabling a Scheduled Notice

- A Scheduled Notice requires two steps
 - Activate at Notice Management and Set Recipients
 - Select # of Days for each schedule notice to be sent for each Lending Group
 - Navigate to Settings > Content Tables > Lending Group and for every Lending Group and every Scheduled Notice you Activated in Notice Management, use the drop-down to set the # of Days for each Job Type
- Setting by Lending Group allows Scheduled Notices to be sent at different intervals for your lines of business.



The screenshot shows the RIMS Notice Management interface. The top navigation bar includes links for Service Request, Assignments, Reports, Settings, Tools, and Help. The breadcrumb trail indicates the current location: Home > System Settings > Content Tables > Lending Group. A sidebar on the left lists various lending groups, including A - Lending Group A, B - Lending Group B, C - Lending Group C, CRE - Commercial Real Estate, EMR - EllieMae Residential, KGRP - K Group, ML - Mortgage Lending, PB - Private Banking, SAG - Special Assets Group, and Test - Testing Group. The main content area displays the configuration for 'Lending Group B'. It includes fields for Abbreviation (B), Group (Primary Sort) (Group (Primary Sort)), and Secondary Sort (0). Below these fields is a table with columns for Task Service Notices, Send Daily?, Valuation, Construction, Data Services, Environmental, Flood, and a final column for timing. The table contains four rows of data for different tasks: Report Verification, Request For Status, Review Hold, and RFP Verification. Each row has a checkbox for 'Send Daily?' and a dropdown for 'Valuation'. The 'Construction', 'Data Services', 'Environmental', and 'Flood' columns also have dropdowns. The final column specifies the timing for each task: 'after Due Date', 'before Due Date', 'after On Hold Date', and 'after Award Date'. At the bottom of the form are 'Save' and 'Cancel' buttons.

Note: Selection list will get sorted in the following order, when applicable: Group (Primary Sort), Secondary Sort, Abbreviation, Lending Group.

Task Service Notices	Send Daily?	Valuation	Construction	Data Services	Environmental	Flood	
Report Verification	<input type="checkbox"/>	4 days	N/A	N/A	N/A	N/A	after Due Date
Request For Status	<input type="checkbox"/>	N/A	N/A	N/A	N/A	N/A	before Due Date
Review Hold	<input type="checkbox"/>	N/A	N/A	N/A	N/A	N/A	after On Hold Date
RFP Verification	<input type="checkbox"/>	N/A	N/A	N/A	N/A	N/A	after Award Date

RIMS Notice Management

Understanding Conditional Rules

When Adding, Editing, or Removing Recipients from Notices, you want to consider the Conditional Rules as these will determine if/when notices are sent to recipients

- Default
- Task Status
- Logged in User Type
- Job Type

Edit Recipients

Rules	Actions								
DEFAULT	Add Recipient Add Rule Item Edit Remove								
<table border="1"> <thead> <tr> <th>Recipient Type</th> <th>Recipient</th> <th>Level</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>User By Assignment</td> <td>Vendor</td> <td>To</td> <td> </td> </tr> </tbody> </table>		Recipient Type	Recipient	Level	Actions	User By Assignment	Vendor	To	
Recipient Type	Recipient	Level	Actions						
User By Assignment	Vendor	To							
INCLUDED ON OPEN AWARDED STATUS									
<table border="1"> <thead> <tr> <th>Rule Item</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>TASK STATUS is in [Contract Pending, Contract Pending-Hold, Contracted, Contracted-Hold, Received, Received-Hold]</td> <td> </td> </tr> </tbody> </table>	Rule Item	Actions	TASK STATUS is in [Contract Pending, Contract Pending-Hold, Contracted, Contracted-Hold, Received, Received-Hold]						
Rule Item	Actions								
TASK STATUS is in [Contract Pending, Contract Pending-Hold, Contracted, Contracted-Hold, Received, Received-Hold]									
INCLUDED WHEN USER IS CA, MANAGER, PA, JM, OR VJM									
<table border="1"> <thead> <tr> <th>Rule Item</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>LOGGED-IN USER TYPE is in [Content Administrator, Manager, Production Administrator, Job Manager, Vendor Job Manager]</td> <td> </td> </tr> </tbody> </table>	Rule Item	Actions	LOGGED-IN USER TYPE is in [Content Administrator, Manager, Production Administrator, Job Manager, Vendor Job Manager]						
Rule Item	Actions								
LOGGED-IN USER TYPE is in [Content Administrator, Manager, Production Administrator, Job Manager, Vendor Job Manager]									
TEST JOB TYPE									
<table border="1"> <thead> <tr> <th>Rule Item</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>JOB TYPE is in [APPR]</td> <td> </td> </tr> </tbody> </table>	Rule Item	Actions	JOB TYPE is in [APPR]						
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Recipient Type	Recipient	Level	Actions						
User By Assignment	Account Officer	To							

+ Add Rule Group

Consider the “On Hold” and “Off Hold” Notices as an example of conditional rules (logic) for notices.

- Edit Recipients

Edit Recipients

Template: **NM: On Hold (v. 1.036.0)**

Event: **Task is put on hold**

Recipients under DEFAULT group will always receive the notice. Apply limitations by moving Recipient under a Rule Group.

Changes to Rule Groups and Rule Items will apply to other templates as well: Since a Rule Group is always composed of at least one Rule Item, removing the only Rule Item in the Rule Group will remove the Rule Group. Removing the Rule Group will remove all Recipients listed under it in all existing templates.

Rules	Actions
DEFAULT	Add Recipient Add Rule Item Edit Remove

Recipient Type	Recipient	Level	Actions
User By Assignment	Account Officer	To	
User By Assignment	Requester	To	

INCLUDED ON OPEN AWARDED STATUS

Rule Item	Actions
TASK STATUS is in [Contract Pending, Contract Pending-Hold, Contracted, Contracted-Hold, Received, Received-Hold]	

Recipient Type	Recipient	Level	Actions
User By Assignment	Vendor	To	

Questions

What's Next?

- Next RIMS University Session will provide an Introduction to RIMS on **Tuesday, October 24th at 4pm EDT** (*Invite coming soon*)
- If you have a suggestion for a future training topic email adanes@exactbid.com
- Have additional questions about Reporting? Email us at support@exactbid.com



Thank You