



Release Notes – 8.2.7

November 2, 2016



VERSION

8.2.7

ExactBid's Real Estate Information Management System (RIMS) Version 8.2.7 is a release for all RIMS8 users.

These Release Notes (including 8.2.6.1 & 8.2.6.2) provide a summary of bug fixes and performance improvements for the following noted areas:

NEW FEATURES & ENHANCEMENTS

Notice Management

Invoices

- New Invoice Processed notice that can be used with full payment of invoice in batch invoice. (8.2.6.1)

Reports

Ad Hoc Reporting

- Decrypted the data for BorrowerFirstName, BorrowerLastName, BorrowersName and LoanNumber in the following Ad Hoc views: vwLAdHocProjectDetails and Project / Job / Task / Property.
- Enhanced ad hoc view with vendor information from scorecard, last task complete date, last RFP award date and last RFP send date.
- Users with access to Ad Hoc Report should see the Global folder. Reports can be copied from the Global folder to user's Personal folder.

All Current Assignments

- The file attachment icon will appear for all projects regardless of whether there is an attachment.

Lender Summary Reports

- Organization filter added for organization-enabled sites.

Service Request Form (SRF)

Property Documents

- Added project number at top of page.
- Page accessed through link within a property section shows specific property address at top of page.
- Page accessed through link next to Send Selected Services button shows a drop-down to allow selection of property address.
- Property address includes full address (Street Address, Address 2, City, State, Nation).
- Page Options: Save-Return to Services, Add Row Without File, Add Document.
- Multiple documents can be highlighted and uploaded at one time.
- Description is displayed in job and task attachment pages and job attachment log.



FHA Portal

FHA Case

- FHA Case # field available via Project Console, Additional Required Fields on Service Types, Engagement Letters, and Ad Hoc Reporting at the project view. FHA Case # is editable in the Submit to FHA portal.

RIMS System

Text Field Limits

- The following text fields show the number of characters used and character limit and restrict the user from typing beyond the character limit: (1) property legal, (2) property/collateral description, (3) additional property comments, (4) transaction comments, and (5) job status comments.



QUALITY IMPROVEMENTS

Account Officer (AO)

Project Search

- AO project search returns projects without an alert. (8.2.6.1)

Change Log

Job Change Log

- Job change log updated to reflect the changer as the logged in user rather than System CA or default Job Manager for the following events: award, direct award, bid authorization, cancel award and cancel RFP.

Email

Pop-up Notice

- Resolved issue where email pop-up caused an error on a project with one external task and two internal review tasks that were all linked. (8.2.6.2)
- When user selects REPLY TO on an email popup email, the TO line will use sender's email rather than default address. (8.2.6.1)

NOTE: This is based on a specific configuration and does not apply to all customers.

Engagement Letter

Invalid Character Strings

- Resolved issues in version 2 and version 3 engagement letters related to invalid characters failing when loading the XML. (8.2.6.1)

International

Accessibility

- Non-US countries accepted in RIMSCentral vendor address, vendor Remit To and vendor certification information.

Lending Group Notices

Report Verification Notice

- Report Verification Notice generates as expected.

Lookup Tables

Property Types

- Content Administrators can edit the following property type default field settings in the property types lookup table: Improvement Size Primary Measure Unit, Improvement Size Secondary Measure Unit and Land Size Measure Unit. Other fields are read only.

Notices

Legacy Links

- Updated link in several legacy notices.

Pay Invoice

Date Fields

- Date fields will allow data entry in addition to use of date modal on pay invoice page.



Reports

Data Summary Report

- Vendor upload date will capture the first vendor upload to the final report tab in RIMSCentral. Deleting the file attachment will not change the Vendor Upload Date captured in the report.

Vendor Service Summary Report

- If a filter selection exceeds 500 characters, the message 'Filter selection exceeds 500 chars - not displayed to allow export to Excel' appears on result page and Excel report parameters tab rather than displaying the individual elements.

RIMSCentral

Certification Request

- Resolved issue where non-appraisal vendors were being asked to enter certification information. (8.2.6.1)

Email Address Formatting

Special Characters

- Resolved issue where a special character in an email address did not function correctly in project and job email, RFP recipient email, group messaging, notices, RIMSCentral login and borrower email on service request form.

NOTE: There is an unresolved issue when using the radio button in project and job email when a user has an apostrophe (') in their email address. The user can still be selected as a recipient.

Service Request Form (SRF)

Property Page

- Resolved issue where carriage return caused an error when validating legal description field. (8.2.6.2)



USABILITY IMPROVEMENTS

Contact/Vendor Search

Search Results

- Paging adding to contact/vendor search results. Toggling "show deleted" returns user back to first page of users.

Project Console

User Selection Tool

- Users can now choose from a drop-down list or search tool to select job managers and vendor on the project console page.

Information Formatting

- Project, property, job and task information displayed in larger and darker font. Headings are smaller and lighter font.
- Up/down arrow in lower right of screen to toggle user to top or bottom of the page.
- Action Bar: Relevant actions to the page will display in the page specific action bar.
- Collapsible Sections: Project Summary, Property Summary, Job Summary and Tasks are now individual collapsible sections.
- New Toolbar Menu: Menu items are now readily available in the new toolbar menu.
- Grouped Menu Items: Some related menu items may be grouped.
- Responsive Layout: New redesigned layout to allow information to display and wrap accordingly regardless of screen size.
- Buttons to either expand or collapse all tasks.
- New window actions on View/Edit Project, Service Request, SRF Printable View and RFP Manager pages.
- Snap to left or right of screen: Window will take up to 100% of the height and 50% of the width.
- Snap to top or bottom of screen: Window will take up to 50% of the height and 100% of the width.
- Open in new tab: Window will open in new browser tab and close the modal window.
- Taskbar: New taskbar feature that will show minimized windows. You will also be able to pin commonly visited pages for quick access.

