LIGHTBOX

RIMS®

Release Notes – 8.34.0

May 18, 2023

RIMS®

VERSION

8.34.0

Real Estate Information Management System (RIMS) Version 8.34.0 is a release for all RIMS 8 users.

These Release Notes provide a summary of selected bug fixes and performance improvements for the following noted areas:

QUALITY & USABILITY IMPROVEMENTS

Award Date

Award Date Issue After Rejected Award

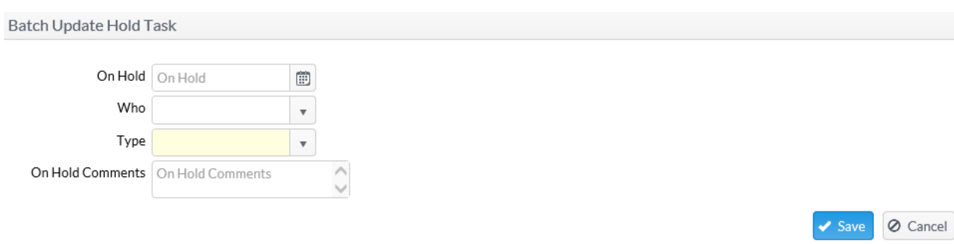
Resolved issue where the original award date was showing on Award Information after vendor rejected the original award on a job and then accepted a subsequent award on the same job.

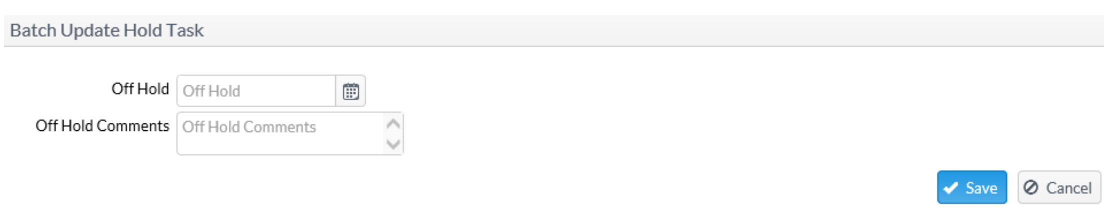
Batch Update

On Hold / Off Hold

Functionality added to place multiple tasks on hold and off hold in batch fashion. A Hold Task button has been added to the batch update main page where Jobs/Tasks are displayed.

After selecting tasks and clicking Hold Task button, Batch Update Hold Task modal appears with the entry fields to put tasks on hold.





Once tasks are on hold, there is no editing of the on hold details. A Hold Task column has been added to reflect the date a task is placed on hold. If a task is not on hold, the field will be blank. Only the on hold date is reflected in the Hold Task column.

Task Status	Hold Task	Task-Job Mgr
Contracted-Hold	Hold-05/12/2023	QA_JM3C QATester
Pending Receipt-Hold	Hold-05/12/2023	QA_JM3C QATester

There are checks in place to make sure that there is not a mismatch of on hold and off hold tasks.

There is a task that is On Hold and one that is Off Hold. Please select all On Hold or Off Hold tasks: 5/12/2023 1:03:36 PM ×

Notices and change log entries from the batch functionality will be the same as a single task on hold and off hold event.

Updated 1 task successfully. 1 notice sent.: 5/12/2023 1:07:06 PM ×

Add / Edit External Fees

Functionality added to add/edit external fees in batch update. Job change log will reflect external fee changes. If multiple tasks are selected and one of the tasks does not contain the option for an external fee, only the tasks with external fees will be updated.

Add / Edit Service Office (Job Field)

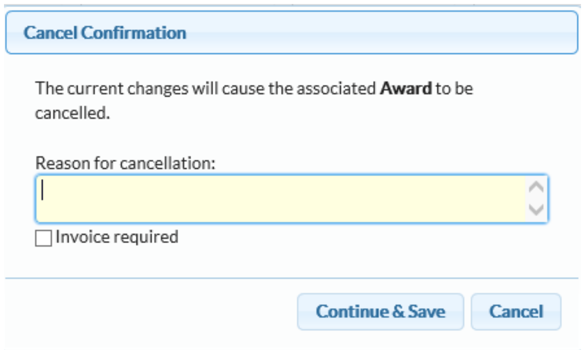
Functionality added to add/edit service office in batch update at the job level. A Service Office column has been added to the batch update main page where Jobs/Tasks are displayed. Job change log will reflect service office changes. Selecting only one task to batch update the service office will update the service office for all tasks because it is a job level field.

GL Account	Service Office	Property Type	Property SubType
987654	Default Service Office	Retail-Commercial	Day Care Facility/Nursery
987654	Default Service Office	Retail-Commercial	Day Care Facility/Nursery

Cancel Non-portfolio Contracted Tasks

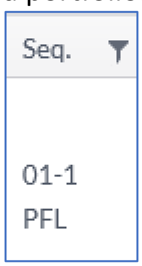
Functionality added to cancel non-portfolio contracted tasks in batch update. When task statuses are not all 'contracted' status, selecting a cancel disposition type will cause a pop-up message explaining the status inconsistency issue and will revert the option to unselected. Notices and change log entries from the batch functionality will be the same as a single task cancel event.

If there will be any fees due to the vendor(s), it is important to have the vendor(s) upload their invoice(s) before the cancellation. Once the task is cancelled, the award will be cancelled, and the vendor will not have access to upload the invoice in RIMSCentral. Make sure to check 'Invoice required' checkbox so that the task will appropriately transition to unpaid (if appropriate). Don't forget to adjust the fee on the task. Consider an amend award to document a partial fee change.



Portfolio Indicator

A portfolio indicator has been added to the Sequence value in the batch update main page. The Sequence value will be suffixed with 'PFL' indicating that the task is part of a portfolio.



Content Tables

Lookup Tables

Appraisal Premise, Appraisal Premise Qualifier, Disposition Types, G/L Accounts and Interest Appraised lookup tables moved to Content Tables.

Delete/undelete functionality added to Appraisal Premise, Appraisal Premise Qualifier and Interest Appraised lookup tables.

Added RecordKey, Description and Sort Order fields if both or either are available in the table.

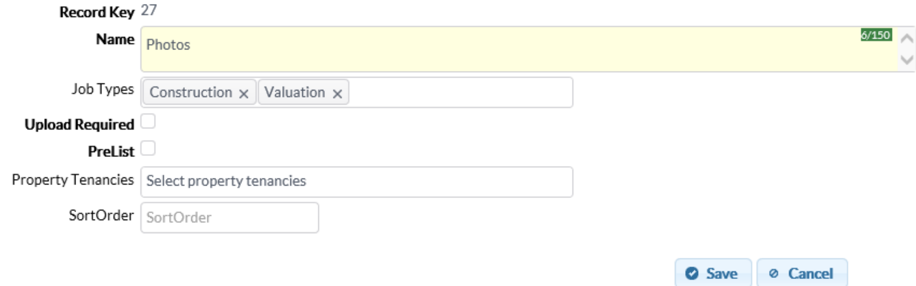
Added character counter on text fields and text areas with a defined maximum length. (Excludes Disposition Types and G/L Accounts)

Lookup tables sort order valid entry value from 1 up to 255, except for Lending Groups and Task Codes which allow sort order up to 9,999.

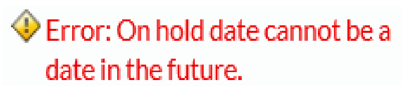
Property Tenancy Items removed from Property section of Content Tables.

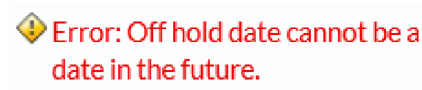
Document Labels

Updated document label lookup table to show job types in drop-down list rather than checkboxes. Added Record Key and SortOrder.



Hold Events	**Hold Dates** Except for Content Administrators, hold dates in the future will be blocked with an alert message.





Job Change Log

Insufficient Data Cancel Event

Resolved issue where the job change log was not logging the job status change when a task was cancelled for insufficient data. Job status change will now be logged.

Job Manager Delegation

Job Manager Delegation

Job Manager delegation will now allow the start and end date to be the same date. The end date represents the last date of the delegation period.

For new service requests created during the delegation period, the Job-Job Manager will follow the job manager service area routing and the Task-Job Manager will become the delegatee on all tasks of the job.

During the delegation period while the Job-Job Manager is the delegator on a job, notices for the Task-Job Manager will generate to both the Task-Job Manager and the Job-Job Manager (delegator).

Notice Management

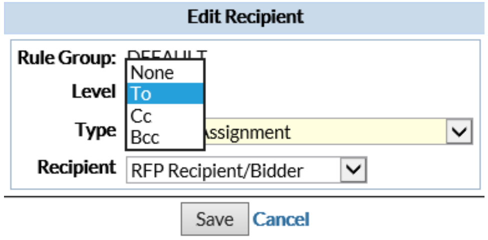
New Notice – New Job Assignment (not from SRF)

A new notice has been added to send to the Job Manager when assigned to a job (not from the Service Request Form). When the Job Manager is changed on the Job, this notice will notify the Job Manager that they have a new job assigned to them. Jobs assigned via the service request routing will remain unchanged.

Job change log will reflect the change Job-Job manager change. Project and job notification logs will show the notice delivery.

RFP Recipients Email Notice

Added ‘None’ option to default selection on RFP recipients email notice.



Portfolio

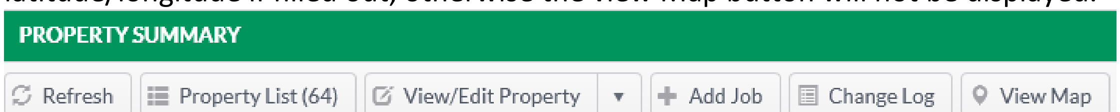
Portfolio RFP Page

Resolved issue where users could encounter an error on the portfolio RFP page.

Property Maps

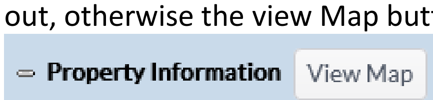
View Maps Link Property Summary

A View Map button will appear in the toolbar of the property summary section of the view project page. The View Map button will link to Google maps with the full address when the address is valid. If the address is not valid, it will use the latitude/longitude if filled out, otherwise the view Map button will not be displayed.



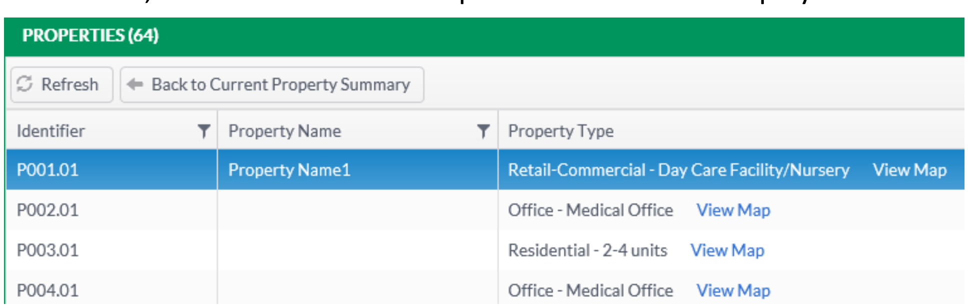
View Maps Link Property Page

The View Map button will appear next to the property information header on the SRF creation page, as well as when the property is edited from the View/Edit Property page. The View Map button will link to Google maps with the full address when the address is valid. If the address is not valid, it will use the latitude/longitude if filled out, otherwise the view Map button will not be displayed.



View Maps Link List of Properties

View Map link appears next to the properties on the property page when viewing the list of properties. The View Map button will link to Google maps with the full address when the address is valid. If the address is not valid, it will use the latitude/longitude if filled out, otherwise the view Map button will not be displayed.



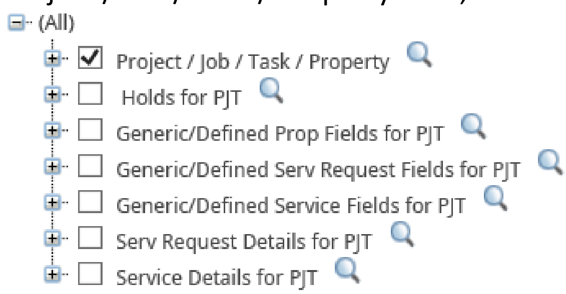
Reports

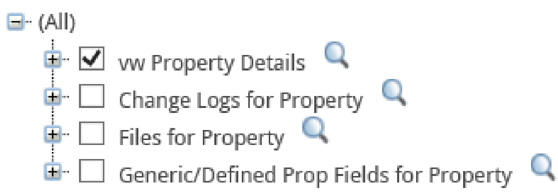
AO RFP and Bid Count Report

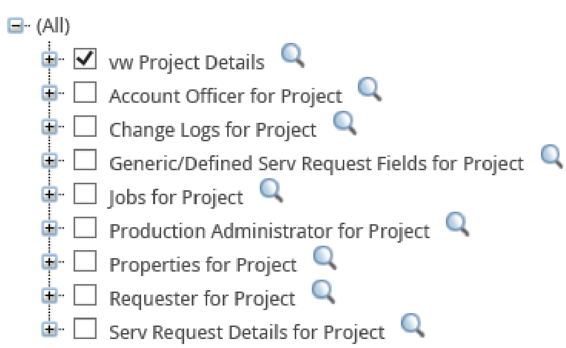
Resolved issue where the AO RFP and Bid Count Report did not include results where the project is Inactive. Added Task Status column to result set of report.

Ad Hoc Reporting –Generic/Defined Fields on SRF

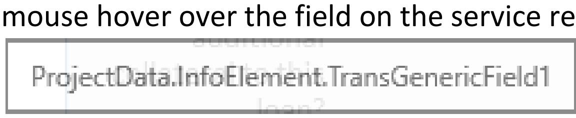
Added views for Generic/Defined fields under the following views:
Project / Job / Task / Property view, vw Property Details and vw Project Details







Permission has been granted to Content Administrators, Production Administrators and Job Managers to view the generic database name for the generic fields using a mouse hover over the field on the service request template.



Ad Hoc Reporting – Scorecard Views

Updated scorecard views to include scorecard information of both the review task and linked external order task.

Lender Summary Report

Resolved issue where task hold dates were not showing in the Lender Summary Report.

Vendor Handling Fee Report

Column header for 'Sales Tax' has been renamed to 'Calc. Sales Tax'.

If there are both external fee and external Vendor Job Manager fee handling fees in the task, Calc. Sales Tax value will be the calculated sales tax per handling fee and display in separate rows.

NOTE: Sales tax will only be calculated from the point the sales tax configuration was enabled on the site.

Resubmit Option

Resubmit Button/Link on Cancelled Tasks

Resolved issue where the resubmit button was available for tasks that were cancelled. The resubmit button should only appear for tasks that were cancelled for insufficient data. The job status of Canceled will only appear in red if it was cancelled for insufficient data.

RFP Manager

Unable to Create RFP

Resolved issue where multiple RFP rejections, amendments and cancellations would cause the page to get stuck at the Create RFP page and unable to send an award.

Valuation Scenarios in RFP

Resolved issue where valuation scenarios were not showing when a task was canceled on an RFP that was previously awarded.

RIMSCentral

Non-portfolio $0 Bid Vendor Response

Added text in RIMSCentral to provide assistance to vendors in responding to an RFP where they do not want to place a bid.

Message content: *For Single Property Types (NOT PORTFOLIO): If you are not placing a bid, you may enter a $0 bid to the customer with an explanation in the 'Bid Comments'. All required fields need to be completed.*

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Quality Check Results

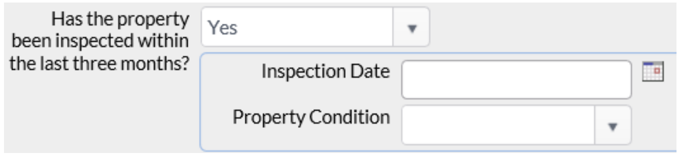
Resolved issue where the Quality Check Results was not displaying the details for the PDF generation resulting from appraisal uploads in RIMSCentral.

Service Request Template

Service Request Form (SRF) - Property Field Changes

SRF property date fields will allow dates in the past.

Added Inspection Date calendar selector field to property inspection question field with ‘Yes’ response.



To enable any of the new fields, please contact RIMS Support at 866-319-7467 or support@exactbid.com.

Property Contact Affiliations

Added ‘Attorney/Counsel’ to property contact affiliation drop-down list.

Show $/Hour Detail & Job Details

Sales Tax Column

Updated settings to only show the Sales Tax column when sales tax is applicable to a customer’s site.

Single Sign On (SSO)

View Permissions for Account Officer User Profiles Created with Auto Provisioning

Enhanced SSO auto provisioning functionality to include Account Officer permissions with account creation.

Third-party Services

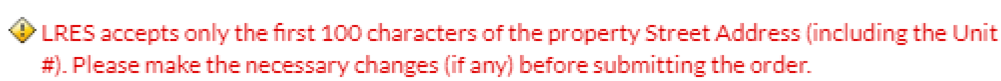
First American Orders

Resolved issue where completed First American orders were completed but remaining on hold on RIMS.

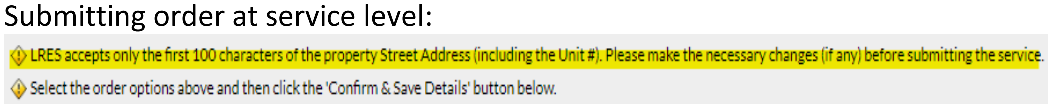
LRES Address Character Restriction

LRES only accepts the first 100 characters of Street Address + (space) + Suite/Floor/Unit#. If the value exceeds 100 characters, only 100 characters will be sent to LRES.

If the 100 characters is exceeded as noted above, an alert message will be presented before the user submits the order.
Submitting order at task level:

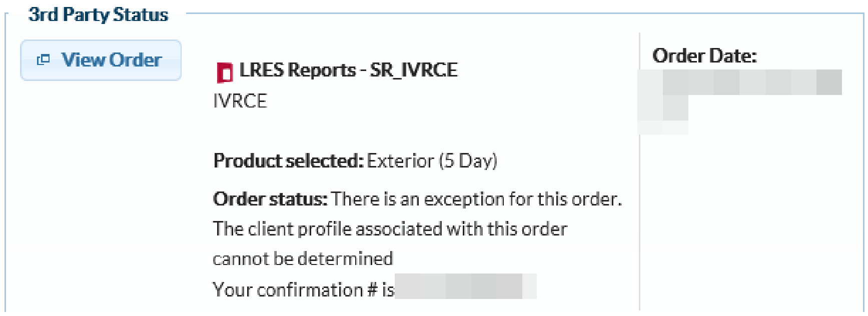


Submitting order at service level:

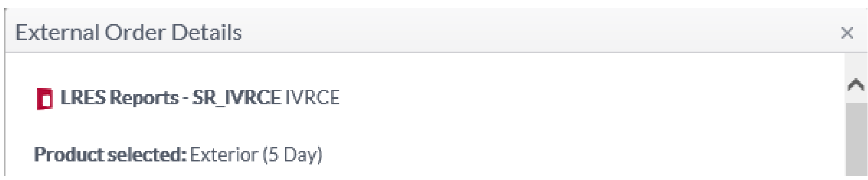


Report/Package Order Selection

When a third-party service/task has a report/package order selection, an indicator of the product selected has been added on the project console page with the 3rd Party Status and the view order button that takes user to the External Order Details.
'Product selected' on project console page showing 3rd Party Status:



'Product selected' on External Order Details:



Third-party Names

Updated names in third-party labels on project console page after logo:

Old	New
First American RAPTOR Reports	First American Reports
Boxwood Means Mercury Reports	Boxwood Means Reports
InsideValuation InsideValuation Reports	LRES Reports
Veracheck Veracheck Reports	VERAcheck Reports

Updated names in third-party permissions in Role Management and Permissions and Privileges:

Old	New
Boxwood Permission	Boxwood Means Permission
FACL Permissoin	CoreLogic Permission
FHA	FHA Permission
FirstAmerican Permission	First American CLEAR Permission
FirstAmerican RAPTOR Permissoin	First American Permission
InsideValuation Permission	LRES Permission
UCDP	UCDP Permission
Veracheck Reports	VERAcheck Permission

Updated portion of task code name with 'FARAPTOR' to 'FA'.

Updated Raptor report task attachments from 'FAMRAPTOR' to 'FA'.

Vendor Job Manager Fees

Sales Tax on Vendor Handling Fee of Vendor Job Manager Fee

In states where customers are responsible for sales tax on the vendor handling fee and the Vendor Job Manager task has vendor handling fee assessed, issue was resolved to calculate the sales tax and include in the Job Summary section of the project console page, Show $/Hour Detail page and Account Officer Job Detail page.

Vendor Job Manager Fees on Job Summary

Updated Job Summary section of the project console page to include external Vendor Job Manager fees (if applicable) in external fees, handling fees, sales tax (if applicable) and total fees.