LIGHTBOX

RIMS®

Release Notes – 8.35.0

August 17, 2023

RIMS®

VERSION

8.35.0

Real Estate Information Management System (RIMS) Version 8.35.0 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:

NEW FEATURES

Service Request Form (SRF)

NEW - Current NAICS Code & Historic NAICS Code

Current NAICS code and historic NAICS code fields have been added to the following areas:

- SRF Property Templates
- RIMSCentral Property fields
- Property Change Log
- Smartfields in Notice Management
- Smartfields in Engagement Letter and Invoice Management
- Bookmarks for Review Documents
- Columns in All Current Assignments/My Assignments/PA Assignments
- Data Summary Report
- Lender Summary Report
- Completed Services Summary Report
- Services Summary Report
- Ad Hoc Reporting in Project/Job/Task/Property and vw Property Details views

A configurable link to search for NAICS code has been added to the SRF property templates. A default website has been set.

To change the URL for the NAICS code lookup configuration, please contact RIMS Support at 866-319-7467 or support@exactbid.com.

Change Log-Project

NEW - Change Log Entries

Added new change log entries for UCDP workflow to **Project Change Log**.

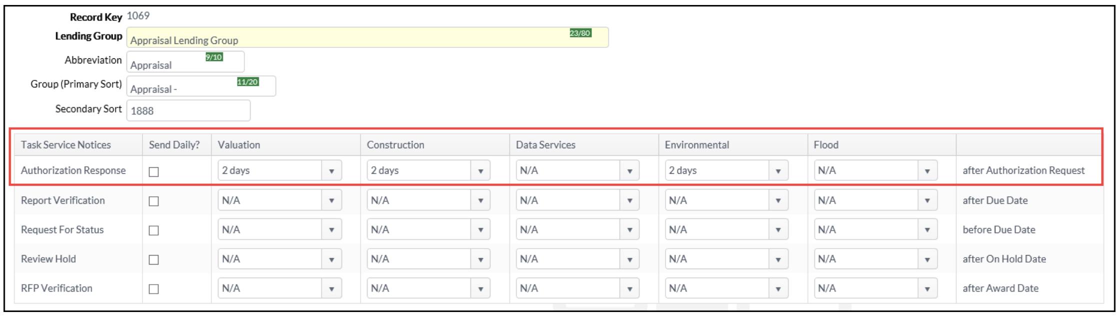
- UCDP Received
- UCDP Exception

- UCDP Rejected
- UCDP Processing Override
- UCDP In Progress
- UCDP Not Successful
- UCDP Completed/SSR Uploaded

Notices

NEW - Scheduled Notice for Bid Authorization Reminder

New Authorization Response notice added to Scheduled event notices in Notice Management. Default recipients are Account Officer, Requester, Job-Job Manager, and Task Job Manager. This notice is a Scheduled notice that will trigger after X number of days of a bid authorization being unanswered by an Account Officer user type. X is the number of days set at each Lending Group. The default setting is 2 days for Valuation, Construction and Environmental jobs. The Default template for the notice must be set as Active for the notice to be triggered.



Reports

NEW - Ad Hoc Reporting User Type Roles

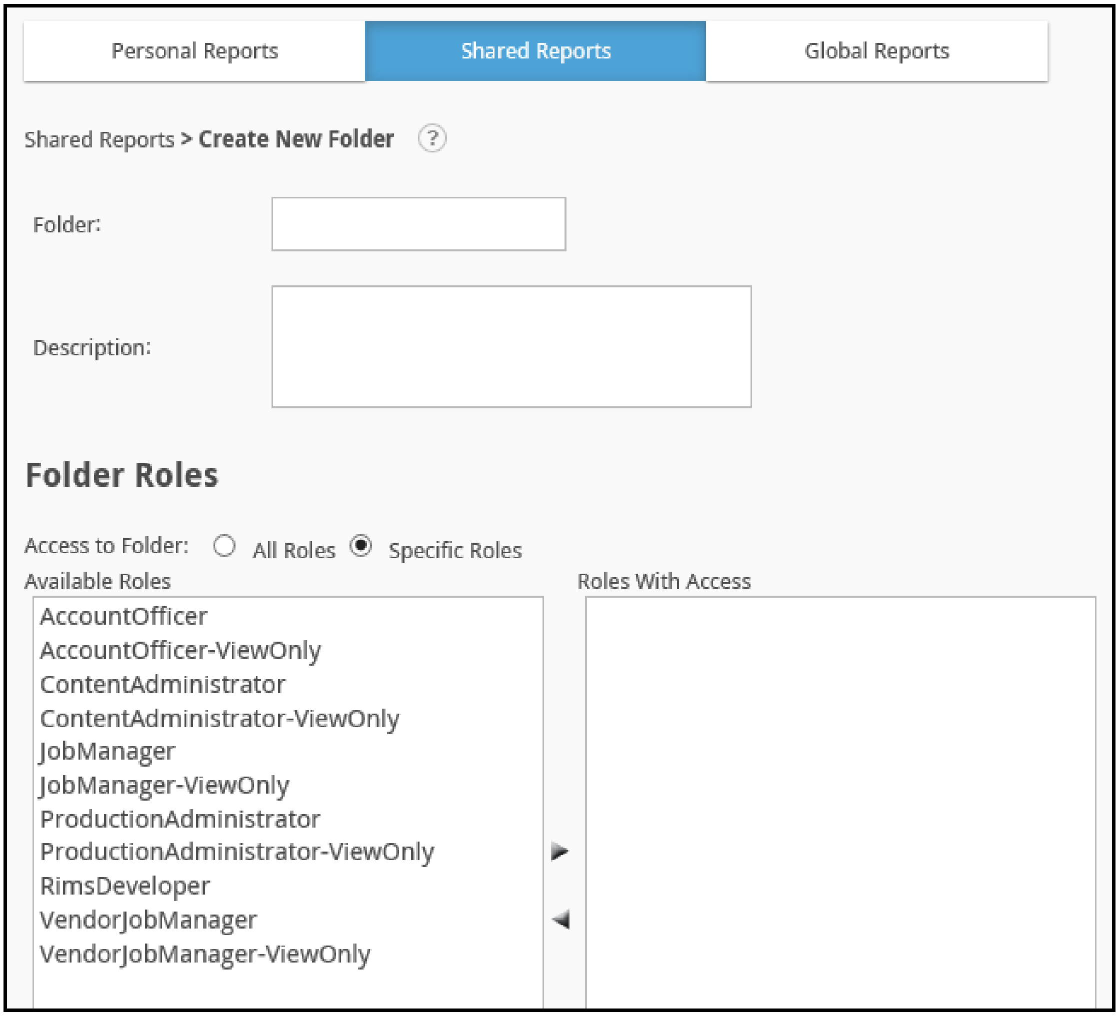
Added user type Roles when creating/editing a new Folder on the Shared Reports tab to limit shared reports to a specific group:

- ContentAdministrator
- ProductionAdministrator
- JobManager
- VendorJobManager
- AccountOfficer
- ContentAdministrator-ViewOnly
- ProductionAdministrator-ViewOnly
- JobManager-ViewOnly
- VendorJobManager-ViewOnly
- AccountOfficer-ViewOnly
- RimsDeveloper

Those suffixed with “ViewOnly” are users that only have View permission to AdHoc Reporting in Role Management.

When a folder is specified only for a few roles, only those users with that role can see the folder and the reports in the folder. It is important to note that when the user's user type is changed, they will no longer be able to access role-specific folders that are accessible to their previous role—even if they created them.

IMPORTANT NOTE: When creating folders only for specific roles, the current role is required to be included in the roles that will have access to that folder and the RimsDeveloper role must be included.



NEW - Views

NEW – User Change Log View.

NEW – Added views for portfolio elements.

Added new views and relationships to vw Task Details:

- Portfolio for Task

- Portfolio for Task (All)

Added new views and relationships to vw Task Details (Including Inactive):
- Portfolio for Task (Including Inactive)
- Portfolio for Task (Including Inactive) (All)

Added new views and relationships to Property/Job/Task/Property:
- Portfolio for PJT
- Portfolio for PJT (All)

QUALITY & USABILITY IMPROVEMENTS

API

RIMS API
Added Obligation field to RIMS API.
R8-19265 Glenda

Appraisal Summary/Review

Expand Allocations by Default
Added ability to expand Allocations by default on the appraisal summary/review page.

Change Log

Job Change Log
Fixed issue where job login date was displaying the time portion of the timestamp in the job change log.

Notification Log
Added order cancellation and failure notices to Notification Logs when these order status service events are set-up for the customer.

Removed the extra message at the bottom of the order cancellation notice about the reason if the message is not other than the order status.

User Change Log
Resolved issue where user change logs were showing numeric values for user permissions (Preferences) rather than text descriptions.

Content Tables

Lending Groups
Resolved issue where user change log will show invalid and/or duplicate lending groups when replacing a deleted lending group.

Create Invoice

Add Column for VHF Sales Tax
Added VHF Sales Tax column to Create Invoice pop-up for sites with VHF sales tax.

Emails/Notices

Auto Award Notice to Vendor
Changed the language on the auto award notice to vendor from Bid Awarded to Award Opportunity to respond to customer concerns over the verbiage.

Insufficient Data Cancellation Notice
Resolved issue where job cancelled due to insufficient data notices were not consistently generating.

NOTE: The recipients of this notice are controlled by the Database Team. If you wish your recipients changed, please contact RIMS Support at 866-319-7467 or support@exactbid.com.

Send Docs Notice
Disabled 'Send Email' button after email addresses are validated and button is clicked for the first time.

Update SMTP Connections to Leverage SendGrid SMTP (Replace IceWarp SMTP)
Updated mail relay provider from IceWarp to SendGrid. This affects customers who have DKIM setup.

IMPORTANT NOTE: This item is dependent on specific customers making the necessary changes to their DNS records.

Portfolio

Cancelling Portfolio Task
Resolved issue where cancelling one task on a portfolio did not cancel all of the other tasks.

Project Console

Job Summary
Resolved issue where 'Handling Fee Sales Tax' was not included in 'Total Internal Fees' and 'Total Fees' in Job Summary.

Task Cancellation
Removed "Invoice Required" checkbox from Cancel Confirmation popup if the customer's site does not track invoice payments.

Reports

Ad Hoc Reporting
Added "Comment" column to vw Vendors

Added "Is Automation" column to vw Change Log

Added relationship from Project/Job/Task/Property View to App Summary Details View

Added “Service Type” and “Service Type Description” columns to vw Job Details and vw Serv Request Details

How to return deleted projects, job and tasks in an AdHoc Report?

For deleted projects:
Added “Removed” column to vw Project Details
Added “Project Removed” column to Project/Job/Task/Property view

Task, job and property details already contain “Active” column which tells user whether the record is deleted.

- Active = True means NOT deleted
- Active = False means IS deleted

Fixed issue where “Date Authorized” field was returning NULL in RFP Details and RFPs for Task views.

Added new columns to vw RFP Details and RFPs for Task views:

- Bid Authorizer First Name
- Bid Authorizer Last Name
- Bid Authorizer User ID
- Authorization Type

Added “Request for Authorization to Authorized Business Days” column to Task Details view.

Added User Login Data for User Details view which can join with vw User Details view.

Added “Total Job Fees” column to vw Job Details and added “Total Project Fees” column to vw Project Details.

Fixed typo in “LoginDate” column label in Project/Job/Task/Property view. New reports will reflect this fix, old reports can be fixed by using column configuration.

Added “Designation” column to vw Vendors.

Deprecated the following columns in vw ServRequestDetails view and added those columns to vw Property Details and Project/Job/Task/Property view.

- Renov Demo
- Renov Demo True
- Is Ground Lease
- Is For Sale

- Is Pending Sale

Added new views and relationship to vw RFP Details:
- Task for RFP
- Task (Including Inactive) for RFP

Added new view and relationship to vw Bid Details:
- RFP for Bid

Added “Cancelled” column to vw RFP Details view. This will allow customers to filter for cancelled RFPs using filter.
- Cancelled = False means NOT cancelled
- Cancelled = True means IS cancelled

Change Date in change log view will now always show date and time portion regardless of set date format in report. The date and timestamp will show in PDT time (was previously UTC time).

Added “JM Comment” column to vw Award Details and vw Bid Details views

Resolved issue where “JM Comment” column was not displaying correctly in vw Bid Details and vw Awards Details views.

Resolved issue where “Cost Centers” column in vw User Details view was missing leading characters.

Marked “Organization” column in vw User Details as DO NOT USE because Organizations column will display data regardless of whether user has one or many organizations associated with them.

Resolved issue where users received error message when selecting ‘exclude duplicate rows’ on the following views:

- vw Award Details
- vw Project Details
- vw RFP Details
- vw User Details
- vw Valuation Data Extract
- Project/Job/Task/Property

Added “Interest Appraised” column to vw App Summary Details view.

Added following columns to vw User Details and vw Vendors views:

- Tax ID
- Remit Name
- Remit Street Address
- Remit Street Address 2
- Remit City
- Remit State
- Remit Zip Code

Added “Request for Authorized to Authorized Business Days” column to vw Task Details (Include Inactive).

Added Misc Charges, Misc Charge Type Id and Misc Charge Type to vw Job Details.

Bid Status Report

Resolved issue where JM Comment box was displaying at the bottom of the bid list rather than next to JM comment link.

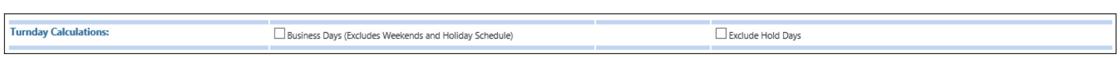
Export User Report

Added the following fields to Basic and Advanced type of Export Users when Vendor or Vendor Job Manager is included as a user type. “Remit To” and “Remit Address” are based on visibility and labels set on Customization Framework for the user type.

- Remit To
- Remit Address
- Remit Address City
- Remit Address State
- Remit Address Zip Code

Lender Summary Report

Ext. Turndays and Int. Turndays are based on calendar days. Added checkboxes for ‘Business Days (Excludes Weekends and Holiday Schedule)’ and ‘Exclude Hold Days’ so that customer has control of the turnday calculation in the report.



RFP

Amend RFP

Resolved issue where amend RFP was not working when RFP had multiple scopes and a scope record was deleted on RFP amendment.

Hard Copy Distribution Area of RFP

The addressee and hard-copy distribution area of the RFP will now prompt if zip code length exceeds the maximum allowed.

Report Type and Report Format
Resolved issue where Report Type and Report Format would not show in View/Edit RFP and review documents.

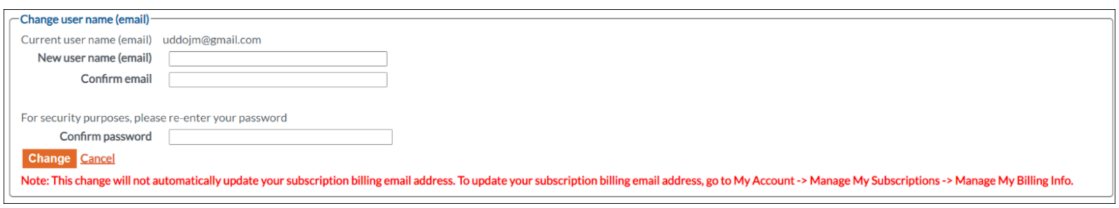
Valuation Scenario Sort Order
Resolved issue where the valuation scenario sort order was not maintained in the RFP based on the RFP template.

View Bids
Resolved issue where JM Comment box was displaying at the bottom of the bid list rather than next to JM comment link.

RIMSCentral

Change User Name (Email)
When a vendor updates their user name (email), it does not update their billing email for a subscription above the basic edition which is free. A message will now appear advising them that they may need to update the billing email information.

"Note: This change will not automatically update your subscription billing email address. To update your subscription billing email address, go to My Account -> Manage My Subscriptions -> Manage My Billing Info."



'Get Insight – what's this?' Link
Resolved issue where clicking link showed 'x' instead of images.

Situs Insight Cancellation
Fixed issue where vendor could not cancel/downgrade their RIMSCentral subscription at the same time they wanted to cancel their Situs Insight subscription. The vendor will now be directed to cancel the subscriptions separately.

Situs Insight Screenshots
Updated Situs Insight screenshots.

View Payment History
View Payment History page is now shown regardless of subscription level.

Service Request Form (SRF)

Minimum Desired Delivery Date

Added bank DateMinValue to Date fields. When this or DateMaxValue fields are set to 0 or a positive integer, it will validate against the current date, even on existing projects.

Service Page Submit

Resolved issue where services page would show "Resubmit Selected Services" when there was a canceled task. The page will now show "Send Selected Services".

SRF Batch Import

Resolved issue where deleted projects and properties were considered in SRF batch import.

Resolved issue where project number on a deleted project would get reused when creating a new SRF.

Third-party Orders

File in Task Attachments

Resolved the issue where some third-party files were showing an error when trying to download.

Update Order Cancellation Workflow for Third-party Vendors

Updated note on SRF service and added the note on the project console View Order when waiting for an order status update. The wait period has been updated from 3 minutes to 15 minutes which reflects the actual time that the system queues the third-party vendor for a status update.

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NOTE: It may take up to 15 minutes before order status is accurately reflected on this page.
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Added the following job change logs:

Order submitted – Changer is the current user when the order is successfully received.

Order updated - Changer is the system user when the order is received and the user completes the requirements on the provided third-party page like Boxwood Means and EDR, or the order data updates with the third-party identifier like with Flood, or the order status changes before it completes.

Order completed – Changer is the system user when the order has completed on the third-party side. It could mean report is still pending upload.

Order cancellation requested – Changer is the current user. This is not applicable to LRES and EDR orders.

Order cancelled – Changer is the current user for LRES and EDR orders, and system user for other orders when the completion of cancellation is delayed on the third-party side.

The new change logs New Value will include the Order # the third-party uses to identify the order when order is successfully received.

The existing change logs related to the service/order being submitted will also register the person who triggered the change as the Changer.

On SRF side when order submission returns an InputInvalid status like on Boxwood, allow the order to be resubmitted. The Cancel Order button also should not show up when the current status is an exception or InputInvalid.

On the project console side when the order is already submitted and is not completed/cancelled/pending cancellation, there will be a Cancel Order button visible which will open the same View Order button page which shows the Cancel Order button.

Clicking on Cancel Order button on this modal will send the cancellation request to the third-party (or tag it as already cancelled for LRES and EDR) and log the appropriate logs as when cancelled through service request.

Cancellation of orders on SRF or project console will trigger cancellation of the task. A Job Cancellation notice will be sent out if the task is the only active task in the job.

Update RIMS task status mapping of Cancelled for this third-party when the order status received is Cancellation in Progress.

Cancellation of order is only allowed when all the following conditions are met:

- There is an order sent
- The associated task does not have a Disposition Type set yet
- The order status is not completed, cancelled, cancellation in progress, input invalid or exception
- For Flood, there must also be a Flood Certification ID already received from CoreLogic

NOTE: Disposition Type and Complete Date fields are disabled when there is an order in progress. When user hovers on the fields, they will see a message "This field is not available to be modified because an order is in progress."

For EDR: Updated EDR order form and accounts page to be styled similarly as other RIMS forms.

Added a request for order cancellation notice sent to lendersupport@lightboxre.com when a user cancels an order with Task Job Manager and Job-Job Manager getting CC'd. Non-production environments send to a different email address.

For Boxwood Means: When an order submission fails, the error is more descriptive especially when the data needs to be updated prior to the submission.

For CoreLogic Flood: Updated Flood order form and accounts page to be styled similarly as other RIMS forms.

Cancellation is available only after we receive the Flood Certification ID. CoreLogic mentioned that 90% of the time, they already have the report existing for a property address, so they could send back the report right away. Typically, there is no chance to cancel an order.

For orders that remain in progress for a while, typically orders in research status, that is when RIMS is able to receive the Flood Certification ID. Once we receive the Flood Certification ID, the Cancel Order button should be made available.

User Management

Account Officer Single-select Lending Group

Added option for single-select lending group versus standard multi-select lending group.

NOTE: If you wish lending group option changed from multi-selection to single-selection, please contact RIMS Support at 866-319-7467 or support@exactbid.com.

Account Officer & Vendor Job Manager User Attachment Permission

Updated Job Attachment Permission option labels for Account Officer (AO) and Vendor Job Manager (VJM):
0 – No access;
1 – Download only;
2 – Upload only;
3 – Download on any job, (VJM-Upload on open jobs only) / (AO-Upload on open properties only);
4 – Download/Upload;
10 – Assigned Projects only - Download only;

11 – Assigned Projects only - Upload only;
12 – Assigned Projects only - Download on any job, (VJM-Upload on open jobs only) / (AO-Upload on open properties only);
13 – Assigned Projects only – Download/Upload;

An open job or open property means an active task exists with no Complete Date yet. An open property can also mean the property is not tied to any active task.

User who has no edit permission on any of the property attachment rows on service request form not has upload permission will only be able to see Return to Services button.

Resolved issue to address the download/upload issue for AOs with Job Attachment Permission dealing with upload on open projects only. NOTE: This will now be open properties rather than open projects.

Account Officer & Vendor Job Manager User Permission Save Button

Resolved issue on User Permissions page with Save button not showing when only Job Attachment is the only available option that can be set, like on Vendor Job Manager's profile.

Vendor User Profiles

Resolved issue where filters were not working for Vendor Insurance and Appraiser Certification on vendor user profiles.