8.2.5 Release Notes

ExactBid's Real Estate Information Management System (RIMS) Version 8.2.5 is a release for all RIMS 8 users.
The 8.2.5 release introduces new features and addresses identified issues with RIMS functionality and performance.

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

NEW FEATURES   Integration with ERS (Environmental Record Search) to provide environmental reports including LenderCheck, Certified LenderCheck, Environmental Risk Summary Report, and Record Search with Risk Assessment

USABILITY   Job Comments and Job Status Comments
- Added "Click to view comments without HTML tags" button and "Save and Clean" button to cleanup HTML and linefeeds
- "Close" button changed to "Cancel"

RFP Comments and Requester Comments
- Added "Click to view comments without HTML tags" button
- Save RFP will automatically clean HTML; View RFP and Edit RFP links will display the formatting correctly

Create Invoice - Confirmation message added after successful document creation

Group Messaging - Maximum number of users returned limited to improve performance of search results

Items in each category alphabetized on Reports page

Paging now appears above column headings of report results and horizontal scroll bars are always available. This change is associated with reports designated as "Logi" reports. (Examples of Logi reports are the Data Summary Report and Lender Summary Report)

Removed "Include App Premise Column" button from Vendor Service Summary Report, Vendor Handling Fee Report and Bid Summary Report

All Current Jobs / My Jobs - Paging added to improve performance; page limit is 100 rows per page

Resolved issue where password fields fell below login area

Help Menu - Removed "Help for This Page" menu option

Job attachment icon will always appear on AO My Jobs page

Uploading a file from AO My Jobs job attachment icon now defaults to Document Type of Request Document

Changing Borrower Name from View/Edit Project correctly updates SRF Borrower Name at

the top, PJT-Project Summary, PJT-Project Email (if Borrower Name is included in subject), PJT-Change Log and Project Search Results

Email Pop-up - Resolved configuration setting issue where "Sender" became customer's email address but "Reply To" did not appropriately become logged in user's email address

Review Document - Creating a Review Document from Appraisal Summary/Review page no longer causes an error. This issue was user specific and was resolved by adjusting Internet Explorer settings. Internet Options > Advanced Tab > Security > Uncheck "Do not save encrypted pages to disk"

Scorecard - Resolved issue where users encountered an error opening a completed environmental scorecard on a closed task

Semi Automation - Resolved issue where vendor selection did not rotate to the next pre-selected vendor

ADVANCED SEARCH

Resolved issue related to searches including Vendor and where users received inconsistent project search results

PASSWORD

Added old password entry as a requirement to changing user password

ENGAGEMENT LETTER CHANGES

Engagement Letter
- Clicking "Accept on Behalf of Vendor" will change "Preview Engagement Letter" to "View Engagement Letter" and the Engagement Letter (Contract Document) will be created in Task Attachments

- Engagement Letter - Until a Vendor accepts an award, the engagement letter link will show as "Preview Engagement Letter" on the Award Information page and Action Menu. The engagement letter (Contract Document) will become a task attachment when the Vendor accepts the award.

CONTENT ADMINISTRATION

"Changes saved successfully" message appears and fades after a "Save" to a lookup table in the Content Tables area

Items under each category on the Content Tables page are alphabetized

User Management
- "Nation" and "Type" save correctly when editing/adding JM State Certification

- Email not required when Notification Method is set to "None"

NOTICE RELATED

Hold notice correctly generates with Hold Comments, Hold Date and Reason for Hold

Report received notice is now delivered to Review Task Job Manager when chosen as a recipient

Amend RFP properly generates an email notice to the recipients

PROJECT CONSOLE

Appraisal Summary/Review - Corrected Reviewer Overall PGIM or OPGIM in the Calculated Values section. Overall PGIM should be Reviewer PGIM divided by Reviewer Occupancy. Reviewer OPGIM = (Reviewer Estimated Value Total) / (Reviewer Potential Gross Income * Reviewer Occupancy)

Award - When changing the amount of a submitted bid on an award, the fee will save correctly

Task Related - Resolved issue where external fees were being wiped out

REQUEST FOR PROPOSAL

RFP - Specific Contractual Requirements (if used) in an RFP are now carried over to RIMSCentral

RFP Recipients--Include Concentric Search - Added "Limit results by Concentric Search" checkbox to limit/filter all of the results by the Concentric Search selection

RFP Recipients
- Renamed "Include Service Area" to "Include Vendor Service Area *"

- Updated verbiage for Pre-Selected Vendors and Vendor Service Area to update depending upon checked items, configuration setting and loan allocation values (if used by customer)

REPORTS

Appraiser Expiry Report
- Email Address column sorts correctly

Disposition Activity Report
- Added option to export to Excel the data contained in the disposition category modal
- Clicking project number link in category modal takes user to the related project page

Export Users Report
- Content Administrator is available as a user type selection

Tax Assessment Summary Report
- Validation message added if State filter is not selected

Vendor Scorecard Report
- Relabeled "Appraisal ScoreCard" column name to "Vendor ScoreCard"

Data Summary Report
- Appraisal Score column relabeled to Vendor Score
- Borrower column corrected to show as FirstName LastName or LastName, FirstName
- A default column order was created; this will only apply to users who have not already saved their defined layout
- Column headings can be moved and saved as the layout for future reports
- Interest Appraised column added to Appraisal Premise columns

- Improvement Size Primary column shows maximum of two decimals
- GL Number field clarified to show GL Account Number and GL/Loss Share when applicable to a customer site
- Job Manager filter split into Job Job Manager and Task Job Manager (also applied to 8.2.4 build)
- By default (i.e. without selecting any filters), data is returned for deleted Lending Groups, Task Codes, and Job Statuses
- Vendor Upload Date column reflected on external task--not internal task
- Fixed columns with incorrect formatting and missing/incorrect values
- The following calculated columns will now be split into two values--Appraiser/Revised value and Reviewer value: Operating Expense, PGIM, EGIM, OPGIM, EOAR, CAOAR, IAOAR, MAOAR

Job Manager Performance Summary Report
- Added Job Manager Groups filter
- Valuation Scenarios selection is no longer required, but still limited to maximum of two Valuation Scenarios
- Added Task Sequence column to the report
- Added checkbox to "Include Jobs with Excluded Fees"
- Corrected Premise Qualifier Amount, Variance and Variance % to reflect decimal values as shown on Appraisal Summary
- Deleted Task Codes are available in drop-down filter list
- Relabeled "Job Manager" filter to "Task Job Manager" and relabeled "Job Manager" column name to "Task JM"

Job Manager Service Level Performance Report
- 'Login to Task Start Std' and 'Report Received to Task Start Std' now accept '0' as a valid entry
- AO Hierarchy filter works correctly now
- Added 'None' option to Account Officer filter selection
- External Task Measures / Vendor Task Award to Complete section: "Task Complete" column relabeled to "Vendor Upload or Task Complete" to reflect data populating in that field
- Reformatted Avg. Net Days/Percent field to include two decimal places
- Gross Turn Days and Hold Days calculations are now configurable in this report. There are two ways to count "the number of working days in a range", either for hold days or gross turn days. There is an EXCLUSIVE counting mode and an INCLUSIVE one. *CONTACT YOUR ACCOUNT MANAGER FOR MORE INFORMATION*.
- Footnote added that explains how gross turn days and hold days are being calculated (inclusive vs exclusive) and/or warning that the calculations for each component may not equal the value in the totals column

RIMS CENTRAL   Reference Documents - RIMSCentral vendors are now able to download older reference documents

Additional Information

For additional details or questions regarding RIMS 8.2.5, contact your ExactBid Account Manager or email support@exactbid.com.