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RIMS®
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Release Notes – 8.12.1

March 23, 2018

RIMS exactbid

VERSION

8.12.1

ExactBid's Real Estate Information Management System (RIMS) Version 8.12.1 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:

NOTE: Items marked with ** have been revised from the March 9th, 2018 version of this document, distributed prior to the RIMS8 UAT update to version 8.12.1.

NEW FEATURES & ENHANCEMENTS

Reporting

Vendor Service Summary Report Search Fields

The Nation, State, and City search fields in the Vendor Service Summary Report have been modified to make defining filters easier.

- *Nation* is now a drop-down and defaults to a blank selection. If Nation is not selected, results will not filter on Nation.

City and *State* are now editable text boxes. A partial match will be performed on the City field, if not blank. A partial match will be performed on the State field, if not Blank. Example: Mary, Maryland, and MD will all match Maryland.

Portfolio

Portfolio Amendment Templates

New default Amendment Templates for Portfolio have been added for each active Job type and enabled (activated) for all customers. The Amendment Templates have the same content as the non-Portfolio Amendment Templates with the following additions:

- New SmartFields available on Engagement Letter and Amendment Document Template editors:
    - Prior Award Fee
    - Prior Award Due Date
    - Award Fee (Portfolio)
    - Award Due Date (Portfolio)
    - Amended Award Fee (Portfolio)
    - Amended Award Due Date (Portfolio)
    - Prior Award Fee (Portfolio)
    - Prior Award Due Date (Portfolio)

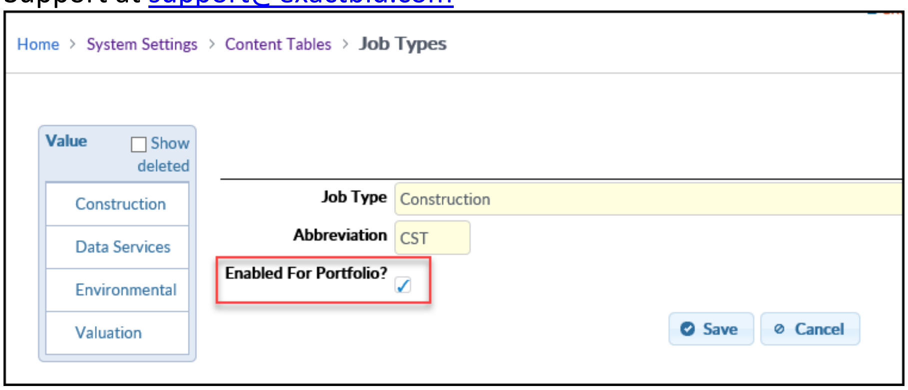
- The Details section contains a repeater of Property Address Full, Amended Award Fee, Prior Award Fee, Amended Award Due Date and Prior Award Due Date.
- Award Fee and Due Date rows using the new Portfolio SmartFields with prior data have been added.

A new field has been added to the Task Codes RFP labeled *Portfolio Amendment Template.* It is prepopulated with the default Portfolio Amendment Template when a Portfolio Template exists.

Portfolio Configuration by Job Type

For Portfolio enabled sites, a checkbox labelled *Enabled For Portfolio* has been added to the Job Types settings. Enabling this allows Tasks in Jobs of that Job Type to be included in a Portfolio Project. If Portfolio is disabled for a Job Type, existing active Portfolios that contain that Job Type will be visible in Portfolio Manager. However, the Job Type will not appear as a selection on new Portfolios.

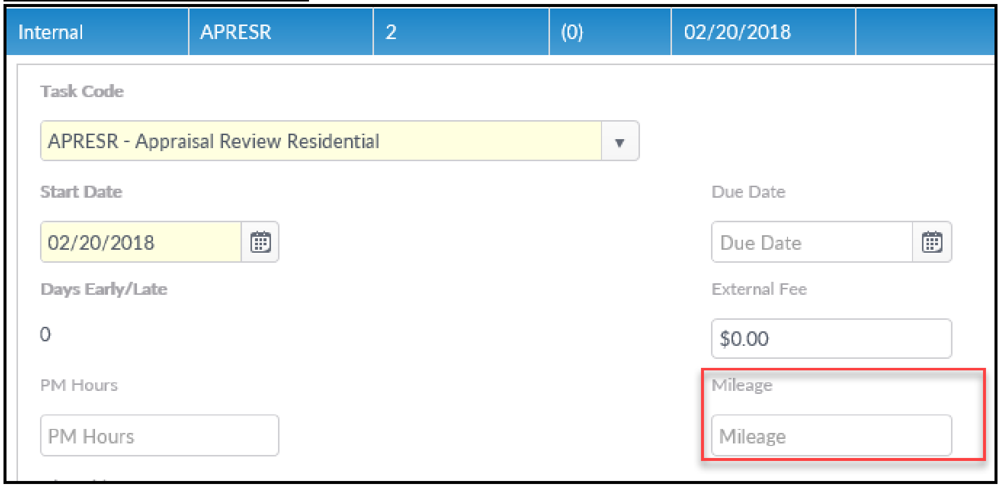
Please Note: To enable Portfolio Feature for the first time, please contact RIMS Support at support@exactbid.com



Jobs and Tasks

Mileage Field

A ten-character Mileage field is now available for Internal Tasks. When enabled, the field and its values will also be visible on the Job Manager Performance Summary Report. To enable this field, please contact RIMS Customer Support at support@exactbid.com



Engagement Letter

Engagement Letter Template SmartFields

Two new SmartFields have been added to the Engagement Letter Template:

- Credit Administrator Email
- Credit Administrator Phone Number

Three new Portfolio SmartFields are now available for all Engagement Letter Templates:

- Portfolio Name
- Portfolio Task Groups
- Project Number - No Job Sequence

QUALITY & USABILITY IMPROVEMENTS

Appraisal Summary

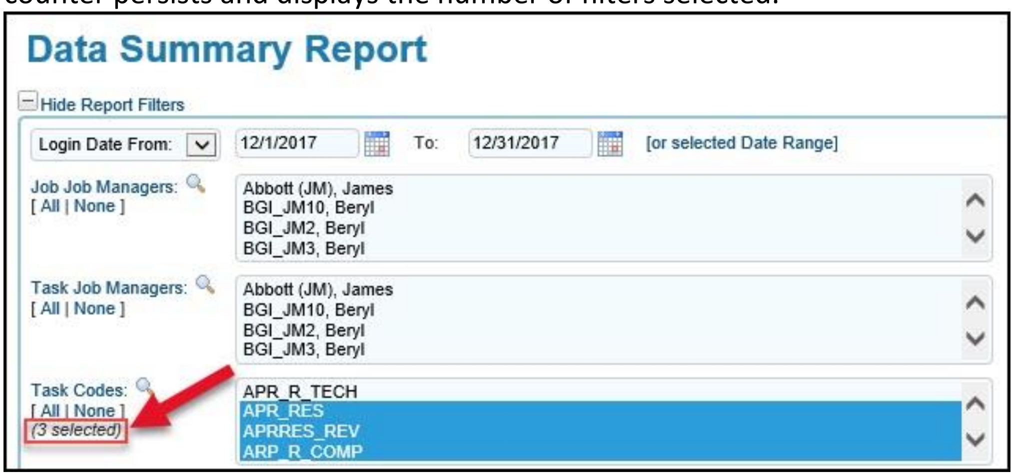
Premise Tabs on Appraisal Summary/Review

For RIMS sites with Multiple Modified Reasons enabled, users were unable to delete a Premise in the Appraisal Summary/Review. An error message would be displayed and the tab would not be deleted. This issue has been fixed; Premise Tabs may now be deleted.

Reporting

RIMS Report Filters

After running a Report, the counter that displayed the number of filters selected disappeared, though the filters would remain selected. This has been fixed; the counter persists and displays the number of filters selected.



Lender Summary Report Job Manager Filter

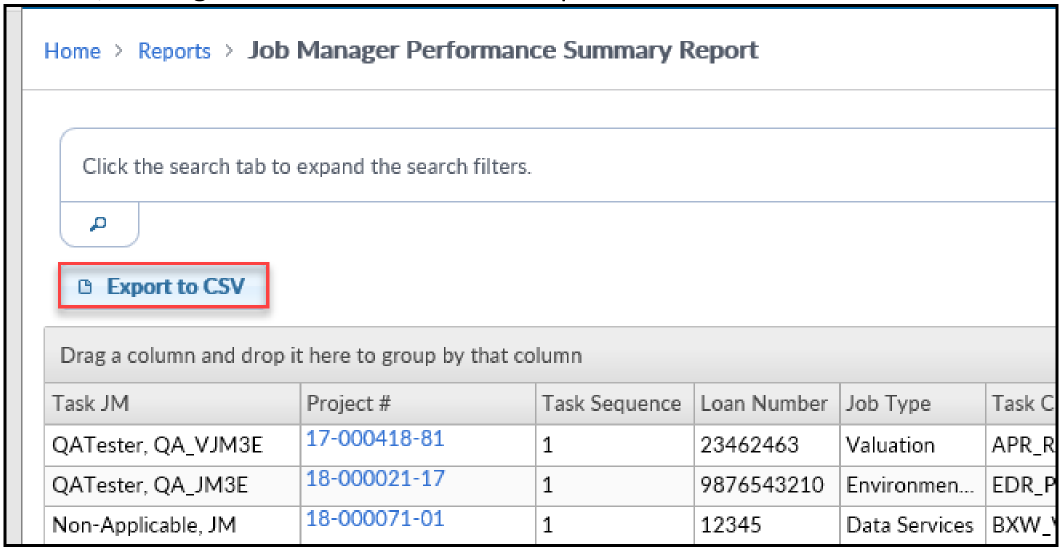
The Job Manager filter and column in the Lender Summary Report were for the Job Job Manager, rather than the Task Job Manager. The Job Manager column and filter have been retitled to *Job Job Manager.* Additionally, a filter and column titled *Task Job Manager* have been added to this Report.

Invoice Detail Report

The Invoice Detail Report was missing several columns, as well as the sorting and searching options. The Vendor Name, Service Office, and Deal No. fields have been added to this report. Additionally, the Sort and Search functions have been added to the Report.

Job Manager Performance Summary Report

Previously, the Export to CSV button was placed in the Search Filters section of the Report page. When the Report was run, that section would become minimized, hiding the Export to CSV button. That button has been moved outside of the Search Filters section, making it more visible once the Report has been run.



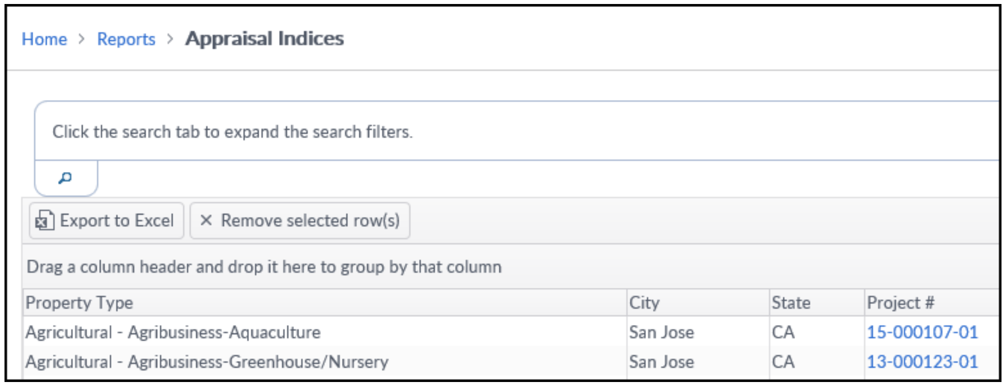
Insurance Report Expiration Date Range

In the Insurance Report, when the *Include Expiration Date Range* was set to NO, the Report still required values to be entered in the Expiration Date From/To fields. Attempting to run the Report without values in those fields produced a pop-up message that stated "Please type in valid Date Range entries." The Report would not run until dates were entered. This has been fixed; if NO is selected for *Include Expiration Date Range,* the Report can be run without values in the Expiration Date From/To fields.

Archived Appraisal Indices Report

After exporting the results of an Archived Appraisal Indices Report to .csv, it was no longer possible to filter or sort columns. Additionally, the display of the Report results prior to exporting would flow outside the table for some users. These items have been fixed and several other changes have been made to improve ease-of-use:

- *Export To CSV* was changed to *Export To Excel*. The generated file type was changed from .csv to .xslx, with column filtering enabled by default.
- *Export To Excel* and *Remove Selected Rows* buttons are moved from the filter area to the results table area.
- Validation alerts are now green/red and appear in the upper right-hand corner of the page. They do not require clicking OK.



Lending Groups

Changing Lending Group

For Organization enabled sites, Job Managers and Content Administrators within an Organization were unable to change the Lending Group for Projects. When attempting to change the Lending Group from View/Edit Project, only Lending Groups associated with the Account Officer's profile were presented. This has been fixed; those Job Managers and Content Administrators with the permission to change a Lending Group will now see all Lending Groups within the Organization and can select a different Lending Group.

User Management

Read-Only Field Navigation in Edit Contact Info

When in Edit Contact Info, pressing the backspace key while a read-only field was selected navigated the user to the previous page. This has been fixed; pressing the backspace key while in a read-only field no longer navigates the user to the previous page.

Project and Property Search

Advanced Search County and State Filters

When logged in as an Account Officer, the Advanced Project Search ignored the County filter, returning results outside the selected County. Additionally, after performing an Advanced Search, the filters set for State and County were not retained. This has been fixed; the Project Search results will now only include Projects within the selected County when the County filter is used. If State or County filters are used, the selections will be retained after the search has been run.

All Current Jobs

All Current Jobs

Previously, the All Current Jobs view would not display Jobs for all Job Managers by default. This configuration setting has been corrected and the All Current Jobs view can now be configured to display Jobs for all Job Managers by default.

Insufficient Data

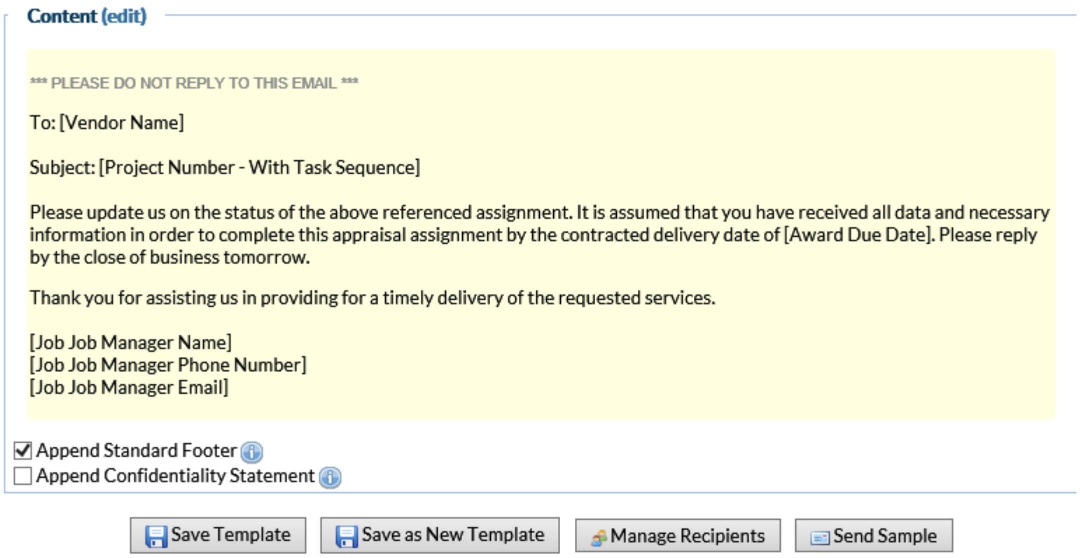
Insufficient Data for New (Tentative) Tasks

The Internal Review Task was prematurely transitioning out of Insufficient Data when the linked External Task was changed. This resulted in the Account Officer being unable to see the details of Insufficient Data or Resubmit the Service Request. This has been fixed; the Status will now continue to be Insufficient Data until the Account Officer resubmits the corrected Service Request or the Job Manager manually removes the Insufficient Data. Once the Insufficient Data Status has been removed, the Task Status will resolve according to the state of the Task.

Notifications

Request for Status Notification Template

Previously, the Request for Status Notification default template displayed the Award Date. This has been fixed; the Notification now displays the Award Due Date.**



Holiday Schedule

Holiday Schedule

Previously, Content Administrators limited to *View* access for the Holiday Schedule were able to view, add and delete holiday entries. This has been fixed; Content Administrators with *View* permissions may now view the Holiday Schedule, but are not permitted to add or delete holiday entries.

Request Documents

Request Document

For sites with Full Automation enabled and Request Document to Assignment Info Conversion disabled, when an Account Officer uploaded more than one Request Document, all Request Documents converted to Assignment Info. This has been fixed; a new configuration has been added for Full Automation that disables the auto-transition of Request Documents to Assignment Info when a new Property Attachment is added to a Service Request or when a new External or Internal Task is added at the Project Console page.

Service Request Form

SRF Printable View

The SRF Printable View screen sometimes failed to load in Projects that started with a Project Number of “12-.” When this happened, a message displayed “An error occurred while processing your request.” This has been fixed; the SRF Printable View loads correctly for all Projects.

Interest Appraised and Property Override Selection of the SRF

Changes made in the *Interest Appraised* and *Property Override* Content Tables, such as editing and deleting items, were not reflected in the Service Request Form in some cases. This has been fixed; users completing an SRF will now see changes to the *Interest Appraised* and *Property Override* fields.

Property Contacts Phone Extensions

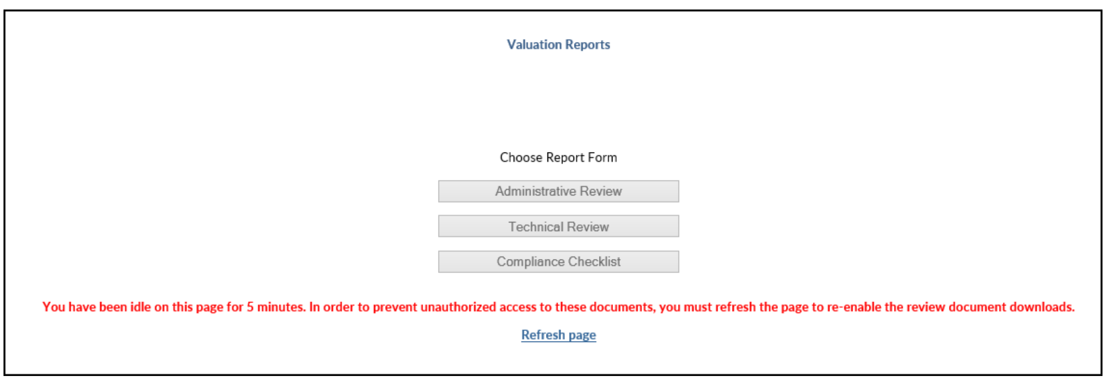
Previously, the phone number fields for Service Request Form Property Contacts did not allow extensions. A configuration setting has been added to allow phone extensions for those fields, increasing the character limit for the fields to 25. By default, this new configuration setting is disabled. To enable this setting, please contact support@exactbid.com

Review Documents

Review Documents

A session timer has been added to the Review Documents creation page. The time limit for this session timer is configurable. Once the Review Documents creation page has been open and idle for more than the specified time limit, the buttons will become inactive, a message will announce the screen is locked, and a *Refresh Page* button will appear. To reactivate the buttons on the Review Documents creation page, click the *Refresh Page* button. The default session timer is set to 5 minutes, please contact support@exactbid.com to change this timeframe.

Please Note: the Review Documents session timer is separate from the general RIMS session timer.



Quick Access

Quick Access Permissions

The Quick Access feature allowed users to upload Document Types for which they had *View* or *NULL* permissions, while they should only have been allowed to upload Document Types for which they had *Add* permissions. This has been fixed; Quick

Access users with *View* permissions will be able to view/download documents and Quick Access users with *View + Add* permissions will be able to view and upload documents.

Quick Access Email Formatting

When including a "-" (dash) in an email address in the Quick Access feature, the email address was interpreted as invalid. A warning would display to the user "Please enter a valid email address. Acceptable characters (A-Z, a-z, 0-9,_,.,@)" and the Quick Access email would not be sent. This has been fixed; the Quick Access feature now accepts email addresses with special characters, including the following: .!#$%&'*+\/=?^_`{|}~-.

RFP Management

RFP Report Distribution Copies Field

Using the number pad to enter a numeric value in the *Copies* field in the Report Distribution section of the RFP Manager produced an error stating "Please enter a valid number." This has been fixed; it is now possible to enter up to three numeric values in the *Copies* field using the number pad or the numbers at the top of the keyboard. If a non-numeric value is entered in the field an alert message stating "Please enter a valid number" will be displayed.

Logs

Change Log Time Offset

The Change Log did not correctly offset the time to display items in the user's local time zone. This has been fixed; the Change Log correctly converts the time zone.

User Change Log Large Values Format

Values greater than or equal to $1M in the Vendor Insurance field were displayed in an exponential format rather than a dollar format in the User Change Log. This has been changed; Vendor Insurance values now display in dollar format, regardless of size.

Job Attachment Log

Previously, the Job Attachment Log did not include a record of the Property Documents attached to the initial Service Request Form. This has been fixed; Property Attachments are now recorded in the Job Attachment Log for both existing and new submitted Service Requests.

Engagement Letter

Appraisal Engagement Letter Inspection Requirements and Approaches to Value

The SmartFields for Inspection Requirements and Approaches to Value, did not populate correctly in some Engagement Letters, showing blank space instead of the defined values. This has been fixed; Inspection Requirements and Approaches to Value now populate as expected in the Appraisal Engagement Letter.

Project Console Page

BLOC Information Fields

The BLOC (Builders Line of Credit) Property fields were missing from the Project Console Service Request button, SRF Printable View, and View/Edit Project after the

Service was sent. This has been fixed; when enabled, the BLOC section now appears on the Project Console Service Request and View/Edit Project buttons, as well as on the SRF Printable View.