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Release Notes – 8.13.0

June 15th, 2018

RIMS exactbid

VERSION

8.13.0

ExactBid's Real Estate Information Management System (RIMS) Version 8.13.0 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:

NOTE: Items marked with ** have been revised from the June 1st, 2018 version of this document, distributed prior to the RIMS8 UAT update to version 8.13.0.

NEW FEATURES & ENHANCEMENTS

Ad Hoc Reporting

Vw Valuation Data Extract

A new view has been added to Ad Hoc Reporting that allows the user to retrieve multiple appraisal summary records (up to six) for each Task that meets the Report's filter criteria.**

Amend Award

Scope Comments

The Scope Comments field character limit has been increased from 2,000 characters to 10,000 characters.

Configuration

Project Number Length

A setting has been added to control the length of Project Numbers for new Projects. Example: if Project Numbers are limited to four digits, all new Projects would appear with four digits after the dash, such as *00-0000*. If the Project Number is limited to six digits, it would appear as *00-000000*. This setting is optional; Project Number length will remain unchanged by default.

To change the Project Number length configuration setting, please contact RIMS Support at support@exactbid.com or 866.319.7467

Batch Invoice

Invoice Number in Batch Invoice

For sites with Batch Invoice enabled, the Invoice Number field in Batch Invoice is now editable. Click the pencil icon in the Edit column to open the Invoice Number field for editing.

Edit	Move to Draft	Invoice	Project Number	Company #	Cost Center	GL Number	Project Name	Lending Group	Invoice Number
	Attention ☐	View	17-000003-03-02	123	45454	123Sample	SRF fix test on 1/5/16	Carol Test Lending Group	56464654

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Security Questions

Previously, when registering as a new user, resetting a password, or unlocking an account, you would be forced to answer security questions. The security questions have been removed. Users will still be prompted to utilize the captcha in the same areas listed above.**

Single Sign-on

Job Type Restrictions

The RIMS SAML functionality now supports Job Type Restrictions. When a user with Job Type Restrictions logs in via SAML, those restrictions are honored.

For more information about enabling Job Type Restrictions and/or SAML, please contact RIMS Support at support@exactbid.com or 866.319.7467

Task Code - RFP

Scope Item Text Fields

The Text (2000, char) fields in Task Codes – RFP now allow all UTF-8 special characters, including but not limited to quotes, commas, and parenthesis.

QUALITY & USABILITY IMPROVEMENTS

Ad Hoc Reporting

EffectiveDOV Field

The EffectiveDOV field found in the *Project Details vw* displayed an error message. This error prevented the user from previewing the information when building an Ad Hoc Report. This has been fixed; the error message no longer displays when previewing an Ad Hoc Report that contains the EffectiveDOV field.

Batch Invoice

Cost Center Values

In some cases, the Cost Center number would not display correctly in Batch Invoice. They would erroneously display the database ID value, rather than the Cost Center number. In other cases, the leading zero in the Cost Center value would be dropped. These issues have been fixed; Cost Center values now appear correctly in Batch Invoice.

Contact Management

Last Login Date

Previously, the Last Login Date displayed on the User Summary Details page sometimes displayed the incorrect date and time. This has been fixed; the time displayed on the User Summary Details is now converted to the local time of the user who is viewing the User Summary Details.

Engagement Letter

Special Characters

Special characters, including but not limited to apostrophes, quotes, and ampersands, appeared as HTML, rather than plain text, in Engagement Letters. The creation of Engagement Letters has been updated to accept UTF-8 special characters for the following fields that are typically included in Engagement Letters:

- Amend Award Comments
- Award Comments
- Job Comments
- Job Status Comments
- RFP Comments
- Requestor Comments
- RFP Scope Comments
- Valuation Comments

RFP Scope Items

If more than one value was selected in an RFP Scope Item, the field would be truncated in the PDF Engagement Letter. This has been fixed; the PDF Engagement Letter no longer truncates RFP Scope Items with multiple values selected.

Preview Engagement Letter

Previously, when an Award was accepted for a Portfolio, the Preview Engagement Letter link did not change to View Engagement Letter on the Award Information screen or the individual Tasks included in the Portfolio. This has been fixed; upon acceptance of the Award, Preview Engagement Letter becomes View Engagement Letter.

Engagement Letter & Invoice Management

Engagement Letter and Invoice Management Permissions

Several changes have been made to the user permissions for the Template Editor, which controls access to the Engagement Letter and Invoice Management:

- Users without the *Add* permission cannot see the Add New Template button on the Template list page
- Users without the *Update* permission cannot activate or deactivate Templates
- Users without the *Add* permission cannot see the Save New Template button on the Template Editor
- Users without either the *Update* or *Add* permissions cannot see the Add Header and Add Footer buttons

Holds

On Hold/Off Hold Notices

When an On Hold and an Off Hold status were set at the same time, only the On Hold Notice was sent. This has been fixed; a Notice is now sent for both the On Hold and Off Hold status. The On Hold Notice is sent first.

Lending Groups

Lending Group Selection

When a site was configured to allow the Requester to select from a list of all Lending Groups, the Requester's Lending Group selection would be ignored, reverting to the Lending Group stored in their User Account. This sometimes led to the incorrect Service Request Form being used when an Account Officer submitted a new Service. This has been fixed; the Requester's Lending Group selection is honored.

Deleted Lending Groups

Lending Groups that were deleted from the Content Tables continued to appear as valid selections on the Project Console screen and in the Edit Project modal. This has been fixed; deleted Lending Groups no longer appear as possible selections on the Project Console screen or in the Edit Project modal.

Notifications

Character Limits

The Company and Title fields used in Notice Management were limited to 32 characters. This sometimes truncated a user's Title and Company values in their RIMS email signatures. This has been fixed; the Company field now supports 80 characters and the Title field supports 64 characters.

Portfolio

Amendment Files

Previously, when an Amendment was created for a Portfolio, the Portfolio Engagement Letter and Amendment Documents were not added to all Tasks in the Portfolio. This has been fixed; those documents appear in the Task Attachments for each Task in the Portfolio.

Portfolio Permissions

Previously, Job Managers without Batch Update permissions were unable to close Portfolio Projects. When attempting to add a Complete Date and set a *Completed* disposition, an error message would be displayed and the user would be logged out of RIMS. This has been fixed; Job Managers without Batch Update permissions can now close Portfolio Projects.

View and Preview Engagement Letter

Previously, the Preview Engagement Letter did not appear for every Task included in the Portfolio when the Award was made. Instead, the button appeared for only a single Task within that Portfolio. The same applied to the View Engagement Letter button, which only appeared for a single Task in a Portfolio for which an Award had been made. This has been fixed; all Tasks within a Portfolio display the appropriate Preview Engagement Letter or View Engagement Letter button.

Project and Property Search

Project Search for Account Officers

When an Account Officer used the Project Quick Search after values had been entered and a search was run using Advanced Search, the results returned ignored the new Quick Search values, instead using the Advanced Search values. This has been fixed; Advanced Search no longer takes precedence over Quick Search. The results returned are sorted in descending order and include inactive Projects.

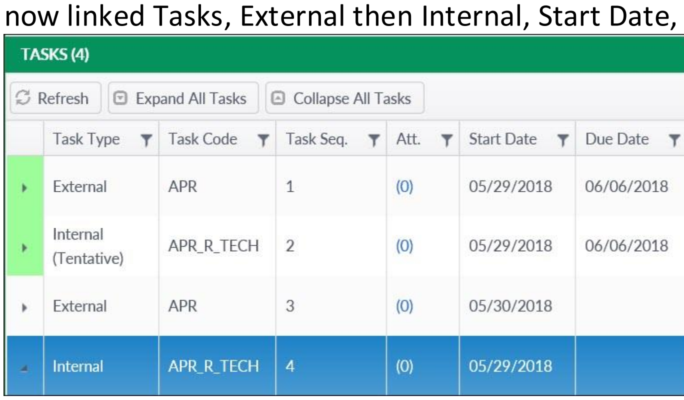
Project Console Page

Pasting Text from MS Word

When pasting text from Microsoft Word that included apostrophes, dashes, single quotation marks or double quotation marks into the Job Comments, RFP Scope Items, or RFP Comments/Requester Comments, the apostrophes, dashes, and quotation marks appeared as question marks. This has been fixed; when pasting those symbols from Word into the Job Comments, RFP Scope Items, and RFP Comments/Requester Comments fields, they appear correctly.

Sorting of Linked Tasks

On the Project Console Page, Tasks were automatically sorted by Start Date. In some cases, this would break up linked Tasks. This has been fixed; the sort order priority is now linked Tasks, External then Internal, Start Date, Task sequence.


TASKS (4)

Refresh | Expand All Tasks | Collapse All Tasks

Task Type	Task Code	Task Seq.	Att.	Start Date	Due Date
External	APR	1	(0)	05/29/2018	06/06/2018
Internal (Tentative)	APR_R_TECH	2	(0)	05/29/2018	06/06/2018
External	APR	3	(0)	05/30/2018	
Internal	APR_R_TECH	4	(0)	05/29/2018	

Load Time for Edit Task

For sites with the Organization feature enabled, the Task modal sometimes took up to 60 seconds to load for Job Managers with access to multiple Organizations. This only occurred in the UAT environment. This has been fixed; the load time for Edit Task has been significantly reduced.

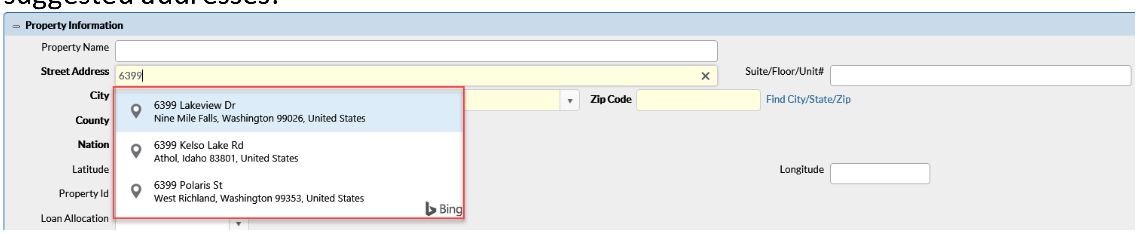
Project Purpose and Cost Center Fields

For Organization-enabled sites, when a Job Manager or Content Administrator changed the Account Officer associated with a Project, the Cost Center field would be automatically changed and the Project Purpose field would be cleared. This has been fixed; changing the Account Officer associated with a Project no longer changes the Project Purpose or Cost Center fields.

Property Address

Address Normalization

When entering a Property address in the Service Request Form on sites with Address Normalization enabled, users will now be presented with a more accurate list of suggested addresses.**



Reporting

Job Manager Performance Summary Report - Vendor Job Managers

When entering a Vendor Job Manager's name in the Task Job Manager filter of the Job Manager Performance Summary Report, the Vendor Job Manager did not appear in the drop-down menu as expected. This has been fixed; Vendor Job Manager names now populate correctly.

Job Manager Service Level Performance Report

The Days on Hold column did not return results, displaying 0 for each row. This has been fixed; the Days on Hold column now returns the correct results.**

Data Summary Report Task Job Managers

When running the Data Summary Report with the Task Job Manager filter set to *All*, some Task Job Managers were not included in the results. This has been fixed; when the Task Job Manager filter is set to *All,* all Job Managers are returned in the results, if they also meet other filter criteria.

Cost Center Field on Export Users Report

When using the Export Users Report to download a list of Account Officers, the Cost Center field would be null if the Account Officer User Profile had multiple Cost Centers listed. This has been fixed; if an Account Officer User Profile has multiple Cost Centers listed on their profile, all Cost Centers will appear in a semicolon-separated list in the Cost Center column of the exported Report.

Construction Costs Report

For sites with Costing Indices enabled, the Construction Costs Report had several related issues, including incomplete results, incorrect formatting, and dysfunctional checkboxes in the filters area. All issues have been fixed; the Report now functions as expected.

Lender Summary Report Job Comments

When running the Lender Summary Report, if the Job Comments column was included and those Job Comments contained special characters, such as the ampersand, the Report would fail. An error message would state "There was an error while processing your request." This has been fixed; special characters in the Job Comments column do not cause the Report to fail.

Lender Summary Report Score Field

Previously, the Score field in the Lender Summary Report failed to return data in some cases. This has been fixed; the Report now returns the Score in the *Score* column or in the *Scorecard Overall Rating* column, based upon your Scorecard configuration. In addition to the new Scorecard Overall Rating Field, two other fields have been added: Scorecard Score Date and Scorecard Scoree.**

Lender Summary Report Columns

Several columns have been added to the Lender Summary Report:

- Service Office
- Int. Complete Date
- Tech Hours
- Year Constructed
- Number of Stories
- Parking Type
- Is This A Participating Loan?
- Is Bank The Agent?
- Deal Number

Count, Total, and Average rows have also been added to the Report.

To enable these fields on your Lender Summary Report, please contact RIMS Support at support@exactbid.com or 866.319.7467.**

Vendor Service Area Report Results

In some cases, when the data in the Special Programs field of the Report was too long, the Report returned no results. This issue has been fixed; the Report now returns results correctly, regardless of the length of the Special Programs field.

Job Attachments File Report

Previously, the Job Attachments File Report returned no results when the File Upload Date filter was used. Additionally, when the Job Login Date filter was used, the filter was incorrectly labelled as Job Logout Date in the results. These issues have been fixed; the Report now returns results when File Upload Date filter is used if there is data to display. When the Job Login Date filter is used, it is correctly labelled as such in the results.

RIMS API

Loan Amount Field

A change to the RIMS API caused Service Request Forms submitted through the API to have blank Loan Amount field(s). This has been fixed; SRFs submitted through the API retain any values entered in the Loan Amount field(s).

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Certifications

Vendors with more than one certification for a state were unable to synchronize relationships with customers. The *Resolve conflict* tool did not fix the issue, instead reloading the same page without any other change. This has been fixed; the *Resolve conflict* tool that appears when there is a certification conflict now functions as expected.

Role Management

Hold Permissions

Users with permission to Edit Holds, but without the permission to Delete Holds, were still able to Remove (delete) Holds on Tasks. This has been fixed; the Delete permission is now honored and Users with Edit permission will no longer be able to Remove (delete) Holds.

Role Management for Ad Hoc

The *LogiAdHoc Basic* and *LogiAdHoc Admin* Role permissions did not function and were removed. The *AdHoc Reporting* permissions are now controlled within Role Management. Users with *View, Add, Edit,* and *Delete* permissions may view, create, edit and delete Ad Hoc Reports in their *Personal* or *Shared* folder. Users with *View* permissions only may view Ad Hoc Reports, but cannot create or edit Reports. Users with *Deny* permissions cannot access Ad Hoc Reports. Existing permissions settings will not be impacted by this change.

To change the default *AdHoc Reporting* user permissions, please contact RIMS Support at support@exactbid.com or 866-319-7467.**

Service Charge Summary

Service Charge Dates

In some cases, the Service Charge Summary listed an incorrect date. The Notification Log and email listed the correct date, while the Service Charge Summary listed a date one day in the future. This has been fixed; all dates are now accurate and display in the user's local time.

Service Request Form

County Field

Previously, the County field was not validated when completing and submitting a Service Request Form. This made it possible for an Account Officer to enter an erroneous value in the County field. This is fixed; the County field is now checked against the Zip Code field. If an incorrect value is entered in the County field, it will be automatically updated.

New Money Field of the Project Summary

When a Job Manager or Content Administrator edited an *Existing Loan* Project, changing *Existing Loan* to *New Loan* and entering a loan amount, the Project Summary erroneously continued to list the Project as *New Money.* Additionally, when the status was changed from *New Loan* to *Existing Loan,* without any new funds, the Project Summary incorrectly listed the Project as *New Money.* These issues have been fixed; New Money correctly displays Yes or No when a Job Manager or Content Administrator edit Existing/New Loan, or Loan Amount.

Borrower Email

When the Borrower's email address was a required field at the Service level of the Service Request Form, an error caused the email address entered to not be saved when the Service was sent. This has been fixed; the Borrower email address is now saved when the Service is sent.

Due Date

When the Service Request Form was configured to create new Services with a blank Due Date field, it was not possible to send the Services with that field blank. A red error message would state "X request has not been sent," where X was the number of Services. This has been fixed; it is possible to submit new Services with a blank Due Date field.

To configure your site to allow this field to be blank, please contact RIMS Support at support@exactbid.com or 866.319.7467.

Short Form Service Request Template

After submitting a Service Request, Account Officers were able to edit some Transaction and Property Fields. This only occurred with the Short Form Service Request Template. This has been fixed; Account Officers can only edit when resubmitting or when the Job Manager has sent the Request back for Insufficient Data.

Task Code - RFP

Additional Documents (Accessory Documents)

The list of Document Types available in the Additional Documents section of the Task Code - RFP template listed Document Types multiple times. When clicking *Back to List* an error would occur, stating "Additional Documents – Document Type is required." This has been fixed; Document Type entries are no longer duplicated and selecting *Back to List* saves the Document Type(s) selected.

Third-Party Services

Insight Permissions

Users with Deny permissions for the Insight third-party service were able to see the Insight link. This has been fixed; users with the Deny permission are no longer able to see the Insight link.

Veracheck Orders from SRF

When submitting a Veracheck order from the Service Request Form, the email address of the user making the order was erroneously deleted. This caused the order to fail. The error message stated "There is an exception for this order." This issue has been fixed; it is now possible to place a Veracheck order from the Service Request Form without error.

Task Holds

Previously, third party service orders automatically closed manual Holds in the event of specific Status changes. For example, if an order changed an On-Hold Task's Status to *Contracted,* the system would automatically remove the Hold and set an Off Hold date one day in the future. This has been fixed; third party service orders no longer remove Holds that were created by a User, except in cases where the order changes the Task Status to *Closed* or *Cancelled.*

InsideValuation/LRES Job Status

When an Account Officer submitted an InsideValuation/LRES Service, the Task was created with a Status of *Contracted* rather than *Not Started.* This has been fixed; InsideValuation/LRES orders begin with a *Not Started* Status. When the Job Manager submits the order the Status changes to *Contracted*.

InsideValuation/LRES Complete Dates

Previously, the Complete Date for InsideValuation/LRES orders was based on Greenwich Mean Time (GMT). In some cases, this led to a Complete Date that was one day in the future. For example, and order completed at 8:30 PM EST on 5/1 would be recorded as 5/2 because 8:30 PM EST is 12:30 GMT. This has been fixed; the Complete Date for InsideValuation/LRES orders is now based on the user's local time. Please note this will only apply to new orders, not historical orders.

Vendor Scorecard

Scorecard Weighting

For sites utilizing a weighted Scorecard, the Overall Rating (Final Grade) was corrected to display the actual calculated value in reports.