RIMS®

exactbid

Release Notes – 8.14.0

August 24th, 2018

RIMS exactbid

VERSION

8.14.0

ExactBid's Real Estate Information Management System (RIMS) Version 8.14.0 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 & ENHANCEMENTS

Ad Hoc Reporting

Hold Details

A new vw (view) has been added for Hold Details. It includes the following fields:

- Project Number
- Project ID
- Property ID
- Job ID
- Task ID
- Task Hold Log Id
- Hold By
- On Hold Date
- Off Hold Date
- Hold Type
- Hold Comments
- Date Entered

Portfolio

Closing Tasks

Previously, it was not possible to select a disposition for a single Task in an active Portfolio Project. When attempting to set the Disposition for a single Task to *Completed*, the user was presented with the option to update every Task in the Portfolio with the same Disposition or to not proceed with the Disposition change. This has been changed; it is now possible to select a Disposition for a single Task in a Portfolio by following the prompts. If the selected Disposition type is non-cancel and the Portfolio is already awarded and Vendor has accepted the Award:

- If the user selects Yes, it will update all Tasks in the Portfolio to the same Disposition type and complete date.
- If the user selects No, it will update only the Task being changed.
- If the user selects Cancel, it will close the prompt so the user is taken back to the Task Edit form.

Reporting

Bid Status Report Comments Field

Bid Comments made by Vendors in RIMSCentral are now visible in the Bid Status Report for Portfolio and non-Portfolio RFPs.

QUALITY & USABILITY IMPROVEMENTS

Accessory Documents

Account Officer Smartfields

When creating or modifying an Accessory Document in the Engagement Letter and Invoice Templates feature, Account Officer-related Smartfields were not available for selection. This has been fixed; Account Officer-related Smartfields are now available for selection when creating or editing an Accessory Document template. These fields include:

- Account Officer:
- First Name
- Middle Initial
- Last Name
- Full Name
- Department Name
- Address1
- Address2
- City
- State
- Zip Code
- Company
- Title
- Suffix
- Lending Group
- Mail Code
- Phone Number
- Alternate Phone Number
- Fax Number
- Email

Accessory Document Generation

When an RFP with an associated Accessory Document was cancelled, or when an Award made for that RFP was cancelled, the Accessory Document would not generate when a new Award was made or when the RFP was resent. This has been fixed; when an RFP has an associated Accessory Document that is set for *Upon RFP* or *Upon Award,* the document is generated every time an RFP or Award is sent. Cancelling an RFP or Award does not impact the document's subsequent generation.

Address Normalization

County Field

Entry of inaccurate county data on a Service Request Form caused some Projects to be routed to an incorrect Job Manager. This has been fixed; the County field is now read-only and can only be filled by selecting a value from the auto suggest drop-down menu or from the *find city state zip* list. The address fields, city, state, county, zip, nation, and latitude and longitude of existing properties are also now disabled; they can be re-enabled by clicking on the street address fields.

Please note this applies to U.S. addresses only.

Ad Hoc Reporting

Default Value Selection

The Ad Hoc report builder allows a default value to be preset for reports with picklist filters. It is useful when a particular value is selected from the picklist by report users more frequently than other values, as it saves users extra clicks when running reports. This functionality did not work as designed - while the builder still allowed a user to preset the default for the picklist filters, when the report was run the default value was not selected. Instead, the last value from the picklist was always pre-selected, which forced the user to pick the proper value from the picklist filter. This has been fixed - the default value for picklist filters is properly pre-selected, saving the user from having to make the selection manually.

Assignment Views and Reports

Private Project Visibility in All Current Jobs

For sites with Private Projects enabled, users without the Private Project permission setting on their account were able to see private Projects when viewing Projects from All Current Jobs, All Current Assignments, and My Assignments. This has been fixed; the permissions for Private Projects are now honored in these reports.

Bid Workflow

Bid Dates

The Bid Date shown in the Bid Status Report did not always match the Bid Date shown in the RFP Manager and Notification Log due to the user's local time zone. This has been fixed; the Bid Date will be identical in all locations. The Bid Date will always be shown in the user's local time zone.

Change Log

Mileage Action Entry

When editing a Task on a site without a visible Mileage field, an erroneous Mileage entry was created in the Change Log. This has been fixed; a Mileage entry only appears in the Change Log when the Mileage field is visible on the Project Console page and a change is made to the field value.

Task Holds

When an On-Hold Task was deleted, the Task Code name appeared in the Change Log. This has been fixed; when deleting a Hold record that only has an On Hold Date, the On Hold Date is logged in the Old Value column of the Change Log. When deleting a Hold record with On Hold and Off Hold Dates, both dates will be logged in the Old Value column.

Engagement Letter

Engagement Letter Function Fields

Engagement Letters did not display the "&" symbol when that symbol was from a Function SmartField, such as *Property Contact* or *Addressees*. Instead of displaying the ampersand symbol, the Engagement Letter would display "amp;". This has been fixed; the ampersand symbol is now displayed correctly in Engagement Letters.

Property Contact

When a Service Request was submitted to RIMS via an API, such as a Loan Origination System, the Property Contact did not populate on the Engagement Letter PDF. This has been fixed; when the Property Contact field is included in the Engagement Letter template, the Property Contact will appear on the Engagement Letter PDF.

Executive Summary

Value Conclusions Page

When accepting an Award on behalf of a Vendor in RIMS, the system did not properly update some data in RIMSCentral. This made the Vendor unable to complete and save the value conclusions page (executive summary) in RIMSCentral, preventing the invoice from being uploaded and submitted. This has been fixed; the Vendor is able to complete and save the value conclusions page in RIMSCentral when the Award has been accepted on behalf of the Vendor within RIMS.

File Management

File Upload Error

When uploading a file that includes a prohibited special character in the file name, no notice of the failure would be displayed. Instead, it would appear as if the system was slow. This has been fixed; if a file containing a special character in the file name is uploaded, an error message will appear.

Group Messaging

Group Messaging Recipients Search

Clicking the Recipients search modal in the Group Messaging feature displayed an error message and then made users unable to access RIMS for up to one day. This has been fixed; the Recipients search modal now works as expected.

Job Details

Reimbursement Processed

Previously, the Job Details page contained a typo: "Reimbursed Processed." This has been fixed; it now reads "Reimbursement Processed."

Notifications

Additional Documents Uploaded Notice

When a Document is changed from Request Document to an *Assign Info D*ocument Type, an Additional Document Uploaded Notice is generated. This Notice includes a SmartField titled Uploaded File Name, which displays the name of the file. Previously, this SmartField did not function as expected, displaying 'Not Available' instead of the file name. This has been fixed; the file name is displayed correctly in the Notice.

Project Console Page

Due Date Validation

Setting a Due Date that fell on a weekend or holiday failed to trigger a warning. This has been fixed; when a Due Date that falls on a holiday or weekend is set, a warning notification appears in the top-right corner of the screen. Please note, this is just a warning message and will not prevent the user from selecting that date.

Linked Task Codes

Previously, removing a linkable Task Code in the Content Tables would remove the ability to unlink a Task on the Project Console page. This has been fixed; the Project Console page now allows users to unlink currently linked Tasks, even if they are no longer linkable Task Codes.

RFP Workflow

RFP Comment Formatting

Upon saving an RFP, the paragraph spacing entered by the Job Manager in the RFP Comments section was removed when the RFP Comments were opened for editing. This has been fixed; paragraph spacing is retained when RFP Comments is opened for editing.

Reporting

Vendor Handling Fee Report Totals

Previously, the Vendor Handling Fee Report did not include the Total, Average, or Average2 summary fields for Vendor Fee. This has been fixed; the Vendor Handling Fee Report now includes Total, Average, and Average2 summary fields for Vendor Fee.

Archived Appraisal Indices Report

The Site Size and Improvement Size fields only accepted whole numbers. This has been fixed; the Site Size and Improvement Size fields now accept values with up to two decimal places.

Insufficient Data Report

Previously, the Insufficient Data Report did not return results for dates past June 2017. This has been fixed; results are now returned for dates after June 2017.

Data Summary Report

When running the Data Summary Report, results were not returned for Environmental Jobs with completed Vendor Scorecards. This has been fixed; results are returned for all Job types specified by the parameters.

Data Summary Report Hold Dates

On Hold Date and *Off Hold Date* field entries continued to appear in the Data Summary Report after those Holds had been removed from the Task. This has been fixed; when a Hold is removed from a Task, it no longer appears in the Data Summary Report *On Hold Date* and *Off Hold Date* fields.

Job Manager Performance Summary Report Permissions

Previously, if a user had access to the Job Manager Performance Summary Report (JMPSR) and it was then set to Deny, the JMPSR would no longer appear in RIMS. However, if the user had the link to the report as a browser bookmark or in their history, they could still access the report. This has been fixed; if a User has the Deny permission for the JMPSR, they will not be able to access it through any means.

Lender Summary Report

Previously, when running the Lender Summary Report with the *Task Complete Date* or *Award Date & Task Complete Date* filter, Tasks that had been completed were not included in the results if one or more Tasks on the same Job were not completed. This has been fixed; the results returned include all Tasks that fall within the filter parameters.

Bid Status Report

The Bid Status Report did not accurately provide values for some fields in Portfolio Projects. This has been fixed; the following fields now display correctly if included as part of a Portfolio bid:

- Prior Service
- Bid Sequence
- Office Location
- Signatory Information
- JM Remarks
- AO Remarks
- Overall Comments
- Whether approved or not
- Whether recommended or not (if column is available)

Lender Summary Report – EOTHER_REV

Previously, the EOTHER_REV Task Code was not returned in the Lender Summary Report. This has been fixed: all Task Codes will now be returned in the Lender Summary Report.

Vendor Performance Summary Report

Previously, checking the "Include Vendors Without Scores" filter in the Vendor Performance Summary Report caused the other filter settings to be disregarded. This has been fixed; the Vendor Performance Summary Report now honors all filter settings.

RIMSCentral

Restrict Syncing of Contact Information

Previously, bank settings that prohibited Vendors from syncing their RIMSCentral contact information with their RIMS contact information were not honored. This has been fixed; a Vendor will see a lock symbol and no longer be able to edit their contact information in their synchronized relationship with a bank that has restricted them from doing so.

Role Management

Loan Amount Access

Several reports did not honor the Hide Loan Amount setting in Role Management, allowing users to see that field when they had the Deny permission. This has been fixed. The following reports now honor the permission:

- Job Manager Performance Summary
- Workflow Task Job Summary Report
- Billing Transaction Report
- Fee Recovery
- All Current Contracted Report

Service Request Form

Appraisal Premise Qualifier

Previously, when the Services page of the Service Request Form included Premise Qualifiers, they were presented in alphabetical order. This has been fixed; the Premise Qualifiers now appear in a left-to-right sort order based on their sort order from the Content Table. If no sort order is set in the Content Table, the Premise Qualifiers will sort alphabetically.

Confirm & Save Details

When submitting a Service Request, a message stated "…click Confirm & Save Details." There is no button labeled "Confirm and Save Details." This has been fixed; the message now states "…click Save Details."

Third-Party Services

Submitting Files to UCDP and FHA

When submitting UCDP and FHA, not all valid files were displayed to Account Officers with the permission to submit files to UCDP or FHA. This has been fixed; all valid files are now available for selection and submission by the relevant user types.

First American, EDR, and CoreLogic Orders

Previously, when an Account Officer submitted an SRF that included an EDR, First American, or CoreLogic order, the Service Request was sent but the third party service order was not. This has been fixed; third party service orders are now submitted by the Account Officer as expected.

User Management

Changing Lending Groups

Account Officers with permission to change their Lending Group were unable to do so. When attempting to change Lending Groups, Account Officers were only presented with the Lending Group they were currently in. This has been fixed; Account Officers with permission to change their Lending Group are now presented with the entire list of valid selections.

Vendor Certification

Vendor Certification Sync

When a new Vendor synced their account, the certification information was not updated, even though they included it in the sync. This has been fixed; when a Vendor syncs their account, RIMSCentral automatically includes the bank (customer relationship) on the certification.

Vendor Import

Vendor Relationship

When using the Vendor Import feature, the Vendor account was created on the RIMS core site, but the relationship was not automatically established with the Vendor's RIMSCentral account. This has been fixed; when using the Vendor Import feature, a Vendor account is created and a relationship with the corresponding RIMSCentral account is automatically created.