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RIMS®
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Release Notes – 8.15.0

December 4th, 2018

RIMS
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VERSION

8.15.0

ExactBid's Real Estate Information Management System (RIMS) Version 8.15.0 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

All Current Assignments

Report Received Date

An optional configuration has been added. When enabled, in All Current Assignments and My Assignments, the Internal Task will reflect the linked External Task's Report Received date when there is a value. This configuration is disabled by default. To enable, contact RIMS Support at support@exactbid.com

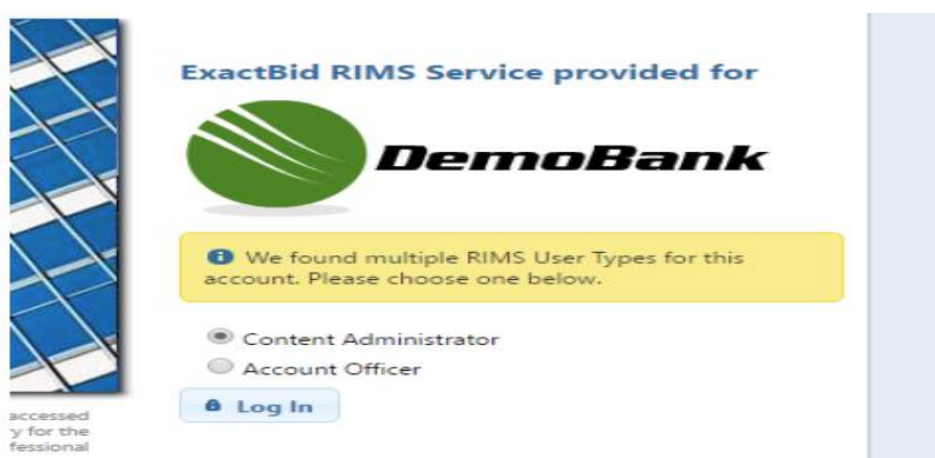
Loan Range Column

On sites for which Loan Range has been enabled, a *Loan Range* column has been made available in the All Current Assignments and My Assignments reports. To display *Loan Range* on these reports, users can update the columns by selecting the Change Report Settings link.

SAML/SSO

SAML/SSO User Type Selection

On sites with SAML/SSO enabled, a user picker has been made available on the login screen. If a user has more than one User Type, they would be presented with a radio button selection to choose which user type they want to log in as.



QUALITY & USABILITY IMPROVEMENTS

Batch Invoice

Invoice Editing

When the Invoice Number on a Vendor Invoice that was submitted to Batch Invoice was edited in the Vendor Invoice area of the Project Console page, the Vendor Invoice File link would be broken within Batch Invoice. Editing the same information in Batch Invoice would not break the link. This has been fixed; editing fields in Vendor Invoice does not break links within Batch Invoice.

Processing Large Batches

When processing a batch containing a large number of invoices, the process would appear to time out and an error message would be displayed. The invoices would still be processed. This has been fixed; when processing a large batch of invoices, the process will be completed without displaying an error message or appearing to time out.
Note: batches containing 300 or more invoices will take several minutes to process.

Change Log

Vendor Invoice Approval

Previously, when a Vendor Invoice was approved, it did not appear in the Job Change Log. This has been fixed; when a Vendor Invoice is approved, an entry is now created in the Job Change Log.

File Management

Request Document Uploaded Notification

When a Request Document (i.e. Property Document) was uploaded to a Project with multiple Properties and Jobs, not all Task Job Managers were notified. This has been fixed; the associated Job Job Manager and Task Job Manager for each Property will now receive the Notification.

Contract Document (Engagement Letter)

Previously, it was not possible to delete a Contract Document (Engagement Letter) from Job and Task Attachments. The Job Attachment Log would indicate that the file was deleted, but the document would continue to appear in Job and Task Attachments. This has been fixed; when the Contract Document file has been deleted, it no longer appears in Job and Task Attachments.

Invoices

Task Status

Previously, when an invoice was uploaded for less than the awarded amount, approved, and processed in Batch Invoice, the External Task status was *Unpaid.* Editing the External Fee to the amount of the vendor invoice, clicking Pay Invoice and marking as Paid in Full did not change the Task status from *Unpaid* to *Closed*. This has been fixed; when the sum of final invoices equals the external fees on a Task with a complete date, the Task Status transitions to *Closed*.

Job Manager Service Area

Job Manager Selection

For some sites, when selecting all Job Managers in the Job Manager Service Area, an error message would be displayed after 30 – 45 seconds. The Job Managers would not be selected. This has been fixed.

Lending Groups

Lending Group Selection on Cloned Service Requests

When a service is added to an existing Project on a site with Cloning enabled, a new Service Request with a new Project number is created. The Lending Group field does not change. In some cases, this caused an incorrect Lending Group to be associated with a Project. This has been fixed. If an Account Officer has more than one Lending Group, they will be prompted to select a Lending Group. If they do not have more than one Lending Group, the appropriate Lending Group is automatically selected.

Notifications

Email Popup Templates

When a change was made to the *Reply To* setting in the Email Popup templates of Notification Management, the change was not saved. After selecting *Current User's Address* or *Custom Address* and saving the template, the *Reply To* dropdown would revert to *Default Address.* This has been fixed; changes made to the *Reply To* setting of the Email Popup templates are retained.

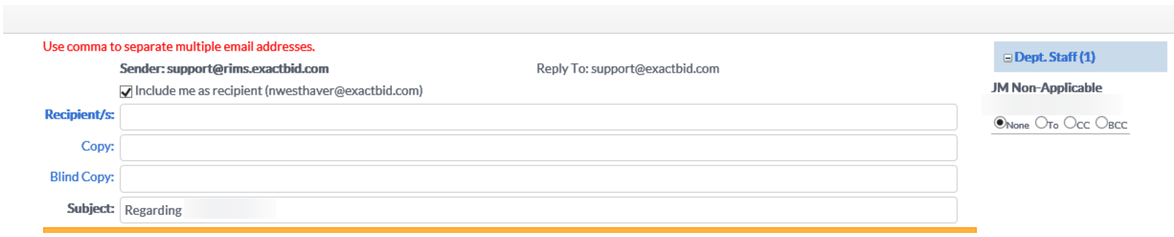
Email Recipients

On Projects with more than one Job Manager, the Email pop-up in the Project Console did not list all Job Managers associated with the Project as Recipients. This has been fixed; all Job Managers associated with a Project now appear in the *Recipient/s* field of the Email pop-up.

Email Address

For sites where a sub domain has been setup for use with RIMS emails, the Sender and Reply To addresses will be transformed to the current user's email or custom email based on Notification Template settings.

Additionally, the Reply To address will now appear in the email popup modal to users sending an email from RIMS. For assistance with sub domain email settings, contact RIMS Support at support@exactbid.com.



Project Search

Date Sent Field

When using the Quick Search to search by Project Number, the results listed a single date in the Date Sent field for Projects with multiple services. This has been fixed; Project Search results now list the SRF Sent Date for each Job row on the sent date for their respective services, instead of the earliest Project's send date.

Reporting

Bid Status Report

When viewing the Bid Status Report for Portfolio Projects, the Job Manager and Vendor Comment timestamps were incorrect. Additionally, the bid sequence, Overall Comment, and JM Comments did not display accurately. This has been fixed; the following changes have been made:

- Corrected Job Manager, Account Officer, and Vendor Comments timestamps
- Re-enabled the Job Manager Comment edit link.
- Inputs on Approved/Recommended checkboxes, Bid # textboxes, Overall Comments and Job Manager Comments on bids that are part of a Portfolio now apply to other Portfolio bids when submitted.
- Made Bid # textbox consistent on Portfolio bids. It is non-editable when sent for approval; it is editable and disabled when not sent.
- The formatting of comments has been made consistent on Bid Summary Report, View Bids, and Award Authorization.
- Fixed Overall Comments with past RFP cancel history on View Bids to include Account Officer comment when None/Any is checked on authorization and to exclude comments made in cancelled RFPs.
- Line breaks are honored on the View Bids page, Bid Authorization, and Bid Status report for Account Officer, Vendor, and External partner comments.

RIMSCentral

Job Attachment Status

When uploading a file from UCDP, the file would upload successfully to RIMS and be available for the bank. In RIMSCentral, the file would continue to display a status of "In Progress" indefinitely. This has been fixed; when a UCDP file has been successfully uploaded to RIMS the status in RIMSCentral reflects the correct status.

User Management

RIMSCentral Invite

In RIMS 8, when a new Vendor Profile was created and the invitation to join RIMSCentral was sent, it was not recorded in the Vendor's user profile change log. This has been fixed; when the invitation is sent, it is logged in the Vendor's user profile change log.

Engagement Letter

Engagement Letter Utility

The following changes have been made to the Engagement Letter Utility feature available to Content Administrators:

- When searching, only Projects where the vendor has accepted an award (or an award was accepted on behalf of the vendor) will be returned.
- The header, body and footer are now read only. If the content of an engagement letter needs to be changed, the Amend Award feature should be used. The 'Replace Smartfields' button has been removed.
- If an Engagement Letter fails to generate as a PDF, the Save button will recreate the Engagement Letter and attach the PDF file to the already accepted award.
- If the Save button is selected with an Active Engagement Letter, the existing Engagement Letter will be marked as deleted and recreated Engagement Letter will be saved and added to Task Attachments.
- If the active Engagement Letter document is deleted, the Engagement Letter Utility will allow a Content Administrator to Create an Engagement Letter. This Create option will automatically create the engagement letter template from the RFP Template and will no longer prompt the user to select the template from a list.
- For a Portfolio Project, the search results will return one row with the Project # as '18-000XXX-0X-0X-PFL'.
- For a Portfolio Project, the search results will return one with an 'x' where x is the number of properties in the portfolio.
- Within the Details link, the Engagement Letter file name will now be displayed.
- For a Portfolio Project, the Upload and Delete actions will now be stored in the Job Attachment Log.