

RIMS®

Release Notes – 8.17.0

June 14th, 2019

RIMS®

VERSION

8.17.0

ExactBid's Real Estate Information Management System (RIMS) Version 8.17.0 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

Project / Job / Task / Property View

The following fields have been added to the *Project / Job / Task / Property* view:

- Loan Admin Full Name
- Loan Admin Login ID
- Credit Admin Full Name
- Credit Admin Login ID

RFP Details View

A new column has been added to the *RFP Details* view: Date RFP Sent to Reviewer. This reflects the date on which an RFP has been sent for review, prior to being sent to vendors for bids. Please note: Because an RFP can be sent more than once, there is a high likelihood of duplicate rows appearing when this column is used or joined with other views containing RFP data. To reduce the chance of this happening, the report creator can check "Exclude Duplicate Rows."

For assistance configuring the date format, please contact RIMS Support at 866-319-7467 or support@exactbid.com

Vw User Details

Three new columns have been added to *vw User Details*:

- Account Created By
- Business Line
- Assigned Roles

Service Request Form

Service Request Link

If a user clicks the Service Request link on the SRF Printable view or the Service Request page, the user will be returned to the Transactions page of the SRF.

QUALITY & USABILITY IMPROVEMENTS

Ad Hoc Reporting

Scorecard and Vendor Details Views

Reports created with both the *Vendor Scorecard* view and either the *Vendor Details for Task* or the *Vendors for Tasks* view failed to populate the Vendor Address columns. This has been fixed.

Award Automation

Enable RFP Details on Request

On sites with Full Automation enabled, if Enable RFP Details on Request was checked at the Task Code level, it could interfere with the Full Automation cycle. This has been fixed.

Engagement Letter Generation

On sites with Full Automation enabled, performance was improved to help generate the Engagement Letter upon acceptance by the vendor in RIMSCentral.

SRF Auto Award Business Rule

On sites with Full Automation enabled, if the SRF Auto Award Business Rule for the *Assign Initial Job Manager* field was set to anything other than "Using JM Service Area," and the Task Job Manager was changed, the Task Job Manager would revert back to the Auto Award Business Rule for the Task Job Manager when Full Automation kicked in again. This has been fixed.

Batch Update

Batch Update Without GL Account

Previously, the Batch Update feature did not work as expected on sites without a visible GL account. Upon attempting an update and clicking Save, nothing happened. This has been fixed; the feature works regardless of whether or not there is a visible GL account.

Cloning

Service Sent Date

When attempting to add services to an unsent SRF, RIMS used the date the SRF was drafted to determine if services could be added or if the SRF would be cloned. For SRFs that were in draft mode for an extended period of time, this caused cloning to be triggered when adding services was the desired functionality. This has been fixed; the cloning trigger is now based on the date the last service was sent, rather than the SRF draft date.

Dashboard

Dashboard Results

Clients with Task Code Record Keys exceeding 32767 encountered an error with All Current Assignments and My Assignments. When a Task Code that exceeded the Record Key limit of 32767 was assigned, the user to whom it was assigned would not see any assignments in All Current Assignments or My Assignments. This has been fixed.

Engagement Letter	Apostrophe in Property Contact Name Previously, when the Property Contact Name (First/Last) contained an apostrophe, the Engagement Letter failed to generate. This has been fixed.
Hold Status	Hold Status Comment When adding a long On Hold comment, text would carry over to the Off Hold comment. If Off Hold comment text had been entered into the Off Hold comment text box, the long On Hold comment would be truncated. This has been fixed.
Job Attachment Log	Job Attachment Log Entries Previously, multiple non-related project entries would be listed for <i>Manual Doc Received</i> in the Job Attachment Log when only a single entry should have been listed. This has been fixed.
Portfolio	Report Type and Report Format For Portfolio Projects with two or more Properties and two or more RFPs, the Engagement Letter failed to populate the <i>Report Type</i> and <i>Report Format</i> fields for all Properties after the first. Instead, those fields would populate a blank space. This has been fixed; the <i>Report Type</i> and <i>Report Format</i> fields now populate correctly for all Properties in the Engagement Letter.
Project Console Page	Project Deletion Previously, it was possible to delete a Project containing Jobs/Tasks that had not been closed or cancelled. This has been fixed; when attempting to delete a Project containing open Jobs/Tasks, the user is presented with a warning message that states: "There are Unpaid or Open tasks/jobs on this Project. All tasks and jobs must be Closed or Cancelled prior to removal of the Project." The user will be prohibited from deleting the Project until all Tasks and Jobs have been closed or cancelled. Property Batch Import When a Job Manager or Content Administrator used a .csv file to add additional Properties and associated Task to the Project, they would receive an error message. This has been fixed. For more information on the Property Batch Import feature, contact RIMS Support at 866-319-7467 or support@exactbid.com
Project Search	Obligation Field Search When searching by the <i>Obligation</i> field in Advanced Project Search, Account Officer users received search results that ignored the <i>Obligation</i> field value. This has been fixed.

RIMSCentral

Phone Number for Subscription Services

The email sent to RIMSCentral users when their subscription was automatically billed listed an incorrect phone number for RIMSCentral Support. This has been fixed.

Value Conclusions

For customers who have Executive Summary enabled, vendors on RIMSCentral were not presented with a link on the value conclusions page to return to the award details page. This has been fixed; a link to the award details page has been added to the right sidebar on the value conclusions page. Additionally, when accessing the value conclusions page from the file upload page, a link back to the file upload page will be visible.

Scorecard

Environmental Scorecard Values

When a rating was left null on the Environmental scorecard, a default value of 4 would be entered in place of that null value. This value would not be included in the Overall score calculation. This has been fixed.

Service Request Form

Property Information Fields

Previously, when an Account Officer edited one of the editable fields on the Property Information page of a submitted SRF, the *Property Status*, *Green Certification*, *Parking Types*, *Property Tenancy*, and *Property Contacts* field entries were deleted. This has been fixed.

SRF Printable

SRF Printable Sent Date

The SRF Printable Sent Date value did not account for Daylight Savings Time, causing a discrepancy with the Job Created Date value in the Job Change Log, which did account for DST. This has been fixed; the SRF Printable Sent Date value is now adjusted for Daylight Savings Time.

Single Sign-On

Employee ID

Previously, users with employee IDs exceeding 16 characters were unable to log into RIMS via single sign-on (SSO). When attempting to log in, they encountered an error message stating authentication failed. This has been fixed; the employee ID character limit has been increased to 60 characters.

Third-Party Services

On Hold Status with Third-Party Services Orders

When submitting a third-party services order, the Task transitioned to Not Started-Hold, before transitioning to Contracted. Any subsequent change to the Task caused the Task status to include “-Hold.” This has been fixed; the On Hold/Off Hold events are now formally logged in the Job Comments and the Change Log.

Duplicate First American Requests

In some cases, there was a delay of up to a minute after clicking Send Services to submit a Service Request to First American. If the Account Officer clicked Send Services again, a

duplicate Service Request would be sent. This has been fixed; the user will be prevented from placing a new First American order if an order ID already exists.