RIMS®

Release Notes – 8.18.0

September 20th, 2019

RIMS®

VERSION

8.18.0

ExactBid's Real Estate Information Management System (RIMS) Version 8.18.0 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:
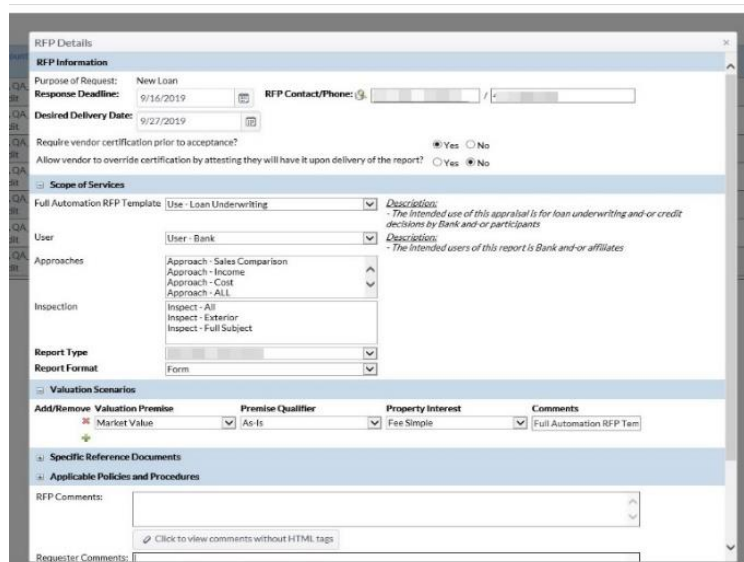
NEW FEATURES & ENHANCEMENTS

Automation

User Management

When a new Job Manager or Vendor Job Manager account is created, an Automation Time Zone field in the user's account is automatically populated with their time zone, if the user has a valid U.S. address. If an existing user changes their address and that address is in a different time zone than the original address, the Automation Time Zone field in their user account will be updated to reflect the change. This will resolve the time zone issue which occurred in Direct-Awarding to the next Vendor after a Vendor rejected an Award.

RIMS API

The RIMS API now supports automation processing. When submitting a Service Type that supports automation, either in a new Service Request or when adding a new Service to an existing Property, it is processed automatically. If on the My Jobs page, the Project number is appended with "Incomplete," this means that the user needs to complete the RFP via the modal.

Third Party Services

Submit Files to UCDP

The Fannie Mae and Freddie Mac UCDP file submission interface now allows the user to submit a revised file up to two times. After submitting the original version of the file, a new button will appear: *Update Submission*. Click to upload a revised version of the original file.

QUALITY & USABILITY IMPROVEMENTS

Ad Hoc Reporting

Report Generation and Output

Previously, some reports failed to run or failed to export successfully to .csv. A timeout error message would be displayed. This has been fixed; the timeout limit has been increased from 90 seconds to 300 seconds.

Award Automation Service

Business Hours

On sites using Full Automation, when a Vendor rejected an Award made using the Automation system, in some cases RIMS did not immediately Award another Vendor. If the Award was rejected outside of the lender's Automation business hours in the Pacific time zone, no new Award would be made until the start of the next day's Automation business hours in the Pacific time zone. This has been fixed; when a Vendor rejects an Award made via the Automation service, RIMS immediately Awards another Vendor. When an Award is made to a Vendor, that Vendor has X hours to accept or reject the Award, where X is the acceptance hours defined in the lender's Automation rules. When determining whether the acceptance hours have elapsed, RIMS uses the Task Job Manager's time zone, rather than defaulting to the Pacific time zone.

Certification Enforcement in Bid Awarded Email

On sites using Full Automation, when a Vendor was awarded an assignment and had no valid state certification, they were allowed to accept the Award without adding or updating their state certification. This has been fixed; when the Vendor clicks on the *Accept Award* link, they will get the following message: "*Acceptance of this award requires that you add/update your property state certification information in RIMSCentral.* Click here to log on to RIMSCentral.com Failure to update your state certification information now could cause you to lose your opportunity to accept this award." Clicking on the logon link will either direct the user to the RIMSCentral login page, which should then redirect the user to the Award page, or if the RIMSCentral user is already logged in, redirect the user to the Award page. If the RFP does not include a certification check or is set to not require a valid state certification, the awarded Vendor will see the standard Accept or Reject options.

Change Log

Change Log for Batch Invoice

Paying an Invoice either partially or fully through Batch Invoice was not logging the information in the Change Log until the disposition was set on the Task. This has been fixed; new/updated Batch Invoice logging has been added to the Change Log which will occur at the time of the event:

- Creating a batch draft file - 'Vendor Invoice Draft File Created' replaces 'Vendor Invoice moved to Draft'
- Committing a batch file - 'Partial Payment Processed' or 'Payment Processed changed'

Cloning

Require Update

When adding Services that would trigger Tier 2 Cloning, whether *Require Update* was checked or not for the Account Officer and Requester on the SRF Template, the Account Officer and Requester were changed to the logged in user. This has been fixed. When *Request Update* is not checked, the Account Officer and Requester information does not change. When *Request Update* is checked, the Account Officer and Requester information is blank, requiring the user to select an Account Officer and Requester.

Engagement Letter

RFP Valuation Scenarios

Previously, the order of RFP valuation scenarios was automatically re-sorted in alphabetical order on the engagement letter. This has been fixed; valuation scenarios will be displayed on the engagement letter in the same order as they appear in the RFP Manager.

Project Console Page

Parking Types and Green Certifications

When a Job Manager attempted to remove a Parking Type or Green Certification from the Property Summary, the edit(s) would not be applied. The Parking Type and/or Green Certification would continue to be listed for the Property in RIMS and RIMSCentral. This has been fixed.
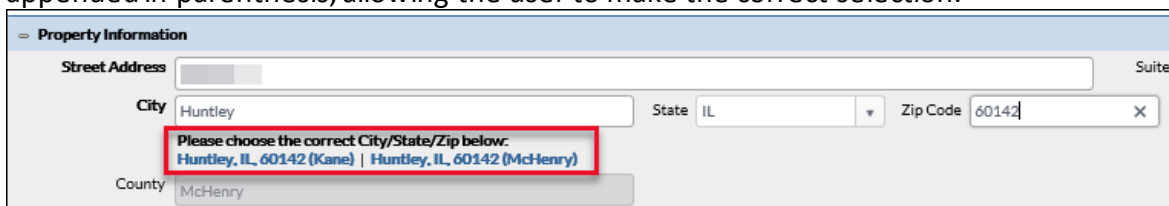
Property Batch Import

Job Job Manager and Task Job Manager

When adding additional properties to a Project using the Property Batch Import Tool, the Job Manager settings from the Property Batch Import Template were ignored. The Job Job Manager and Task Job Manager were populated as "JM Non-Applicable." This has been fixed; the Job Job Manager and Task Job Manager are populated with the correct information from the Property Batch Import Template.

Property Detail Management

County Selection

When a user entered an address that had more than one county associated with it and then selected the correct county, the system would sometimes automatically switch to a different county upon saving. This has been fixed. When an address has more than one county associated with it, each possible selection will appear with the county name appended in parenthesis, allowing the user to make the correct selection.
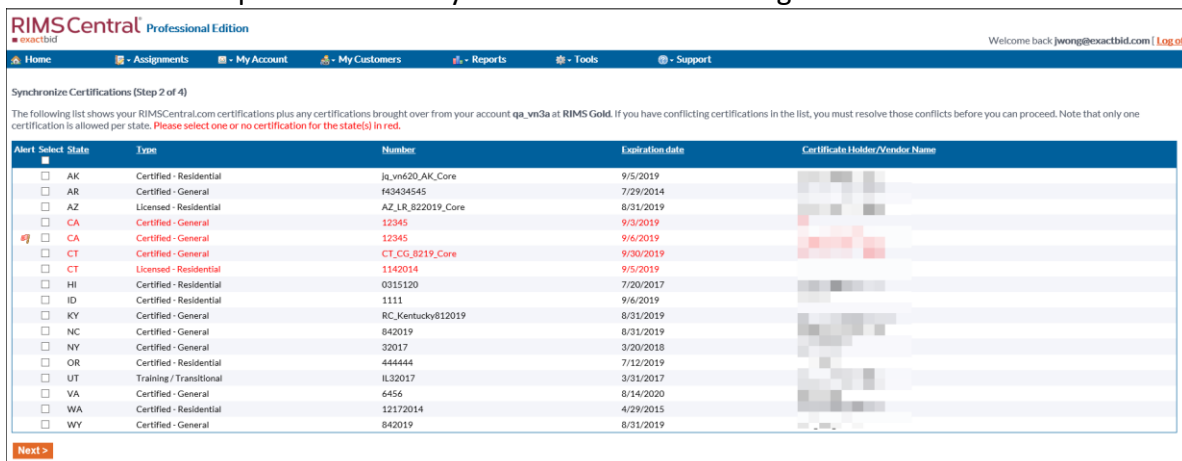
RIMSCentral

Same-State Certifications

In some cases, a RIMSCentral user with multiple certifications in the same state was unable to synchronize their relationship with a bank. This has been fixed. RIMSCentral users are now presented with a single page listing all their certifications, including those added in RIMS. When synchronizing with a bank, the RIMSCentral user may only select a single certification to synchronize for each state. Any certification from the RIMS Core site that the Vendor chooses not to synchronize is removed from the RIMS Core site.

Note: The Vendor should have the best knowledge of their certification information and this should not impact the accuracy of the information being stored on the RIMS Core site.

Third-Party Services

First American Property Type Major and Property Subtype

Previously, First American did not receive the Property Type Major and Property Subtype included in RIMS orders. This has been fixed.

First American County Information

In some cases, the county information included in First American orders in RIMS was not automatically validated against the First American county list. This delayed the order processing and required the submitting user to complete additional steps. This has been fixed; the RIMS county database has been updated with the FIPS county codes.

Task Holds

In some cases, when a user manually placed a Task for an ordering service -- such as Boxwood, First American, or LRES -- On Hold, the service would remove the Hold status after a few days. This has been fixed; the Task will remain On Hold until the order is Completed/Cancelled. When the order is set to Completed/Cancelled, if the Task is On Hold, an Off Hold Date will be populated and the Task Status will be set to Closed/Cancelled.

User Management

Last Login Date

When a Content Administrator modified a user's profile information, that user's Last Login Date value would change to 12/31/0000. After navigating away from that user's page and then returning to it, the Last Login Date would revert to the correct value. This has been fixed; editing a user's profile information no longer changes the Last Login Date value.

Vendor Performance Screen

Previously, the Vendor Performance screen would be blank for Vendors with a large number of records in their profile. This has been fixed; the number of records displayed on the Vendor Performance screen is now limited to 2000, with priority given to *In Progress* records. On profiles with more than 2000 records, a message states that the records exceed the threshold and are truncated prior to the Complete Date. If more than 2000 records are *In Progress,* a message will state that the records have been truncated to 2000.