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RIMS®

Release Notes – 8.20.0

February 21, 2020

RIMS®

VERSION

8.20.0

ExactBid's Real Estate Information Management System (RIMS) Version 8.20.0 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:

QUALITY & USABILITY IMPROVEMENTS

RFP/Bids

Authorizing Bids

There have been issues surrounding the Account Officer (AO) authorizing bids and the status transition when a new or updated bid is received from vendors. Task Status transitions have been updated to show as follows:

Bid Created/Updated – RFP (Bids) (regardless of whether approved/authorized)

- If prior to this, AO has already sent their authorization response and this bid was authorized, AO would get a message in red text on bid authorization page "The list of previously authorized bids has changed and needs new authorization. Please review the highlighted rows of modified (bid(s)."

Bid Cancelled:
- RFP – If no other bid present
- RFP (Authorized) – If not approved with other bids present – no status change if approved with another authorized bid present
- RFP (Notified) – If approved with only other approve bids present
- RFP (Notified) – If authorized with only other approved bids present
- RFP (Bids) – If authorized with only other non-approved bids present
- If prior to this, AO has already sent their authorization response and this bid was authorized, AO would get a message in red text on bid authorization page "The list of previously authorized bids has changed and

Bid sent for authorization – RFP (Notified)
- If prior to this, AO has already sent their authorization response and the list of approved authorized bids has changed, AO would get a message in red text on bid authorization page "The list of previously authorized bids has changed and needs new authorization."

AO authorizes any/all bids – RFP (Authorized)

AO authorizes no bid – RFP (Bids)

Bid Status Report
Task Status has been added to the Bid Status Report. In addition, a flag will appear next to the Task Status when the Account Officer has sent an authorization response prior to the Job Manager resending bids for approval (when list of authorized bids has changed), or an authorized bid gets modified or cancelled.

RIMSCentral

Valid Certification Message
When trying to accept an award in RIMSCentral, vendors are frequently confused when they receive an error message stating they have no valid certification. Fixed the issue by improving the displayed message. Message displayed will be:

"You do not have a valid certification for this state linked to this lender relationship. In order to accept this award, you must add a valid certification, or if you already have an unexpired certification for the relevant state, you may need to edit the certification on the Certifications page and ensure the checkbox for this lender is checked. Click **here** to view your current certification on file."

Engagement Letter & Invoice Management

Reference Number SmartField
A new SmartField has been added to Engagement Letter & Invoice Management. It is a property field in the database labeled 'ReferenceNumber'. The SmartField name is 'Reference Number'. Many customers have applied a user friendly name to the field such as Property ID, NAICS Code, etc.

Payment Processing

Pay Invoice
When a Job Manager or Content Administrator did not fill in the required fields for a new payment, the pay invoice page did not allow the user to save and close. In addition, this caused an issue when deleting an existing payment. The issue is fixed to allow the user to delete a blank invoice payment row before saving and closing the page. If user attempts to save and close the page without deleting the blank invoice payment row, a modal will appear directing the user to delete the blank row.

Portfolio RFP/Bids

VHF Fee Calculation
On portfolio RFP/Bids, the VHF fee was being calculated using the aggregate of bid fees. The issue is resolved to display the VHF fee in the portfolio bids total.

Notifications

Award Authorization
The link in the award authorization notice to the Account Officer was expiring in 7 days. The link is no longer restricted by an expiration date.

Third-Party Services

Report Received notices were not generating when the report was uploaded. Issue has been resolved so that the Report Received notice gets sent only upon the successful upload of a third-party file to RIMS.

Reports

User Permissions Report

The User Permissions Report was including roles that were deleted from a user profile. The issue has been resolved so that only roles currently checked on the user profile display in the report.

RIMSCentral Bid Activity Report

Some vendors were experiencing a timeout when viewing their Bid Activity Report. Issue was resolved by updating the production RIMSCentral configuration to use the same report URL that RIMS 8 core uses.

Property Batch Import

Property Batch Import Template Job Sequencing

There was an issue with the property batch import template where jobs were created without a job sequence greater than '99'. The issue was resolved to accurately generate job sequence numbers equal to and greater than '100'.

Job Attachment Log

External Document Received

When clicking the External Document Received button, the job attachment log was showing rows of information that were not related to the job/task. The issue was resolved to show only a log for a particular file record.

Hold Events

Modified On Date/Timestamp

When a hold event was modified, the time reflected in the 'Modified On' column was using GMT rather than local time. This could cause the date to appear as the next day. The issue was resolved to reflect the user's local time in the column.