

RIMS[®]

Release Notes – 8.23.0

October 30, 2020

RIMS®

VERSION

8.23.0

ExactBid's Real Estate Information Management System (RIMS) Version 8.23.0 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

Engagement Letter Utility

Job Attachment Log

When an Engagement Letter (Contract Document) was deleted and created using the Engagement Letter Utility, the Job Attachment Log was logging the wrong user. The issue was resolved to log the current logged-in user when either Accept on Behalf of Vendor on RFP Manager is clicked or created through the Engagement Letter Utility. When the Contract Document is deleted, it will log the logged in user as the Changer for File Deleted log.

Notices

Task Completed Notice (Version 1.075.x)

The Task Completed Notice was not generating when the external task was in an Unpaid status. Resolved the issue by adding Unpaid task status as a trigger to generate the Task Completed Notice.

Task Assignment Notice & SRF Acknowledgement Notice

On large projects with numerous jobs (e.g. 90 jobs), all of the Task Assignment and SRF Acknowledgement Notices would not generate. The issue resulted from a time limit to process all service data from the user submission. The issue was resolved by limiting the number of services sent to the service at a time and making multiple calls to the service.

NOTE: User needs to wait for the page to complete until it shows that all selected services have been processed.

Reports

Ad Hoc Reporting

Added Task Code Description to the following views where Task Code is also returned:

- Project / Job / Task / Property
- Task Code Description

- vw Int Ext Task Details
 - Internal Task Code Description
 - External Task Code Description
- vw Linked Task Details
 - Task Code Description – Task1
 - Task Code Description – Task2
 - Task Code Description – Task3
 - Task Code Description – Task4
 - Task Code Description – Task5
- vw Task Details
 - Task Code Description
- vw Task Details (Including Inactive)
 - Task Code Description
 - Internal Task Code Description
 - External Task Code Description

Ad Hoc Reporting

Added the following fields to vw Change Log:

- Change User Login ID
- Changer user First Name
- Changer User Last Name
- Changer User Name

Ad Hoc Reporting

The following should show on Tasks (Including Inactive), whether selected after Job Details or not:

- Awards for Task
- Files for Task
- Holds for Task
- Invoice for Task
- RFPs for Task
- Task Job Manager for Task
- Vendor Details for Task
- Vendor for Task
- Vendor Scores for Task
- Vendor Scores for Task (All)
- Added missing relationship of “vw Task Details (Including Inactive)” with “Holds for Task (Including Inactive)”
- Relabeled “Files for Tasks” relationship with “vw Task Details (Including Inactive)” and “Tasks (Including Inactive) for Job” to “Files for Tasks (Including Inactive)”

- Instead of deleting, to not break reports using them, the following incorrect relationships have been relabeled with prefix 'DO NOT USE'. Corrected relationships have been added. **PLEASE CORRECT ANY REPORTS IF ANY OF THE 'DO NOT USE' VIEWS ARE SELECTED IN A REPORT:**
 - old "Tasks (Including Inactive) for Job" with "Jobs for Project" which was actually tying "Jobs for Project" with "Jobs for Project" -> "DO NOT USE – Jobs for Project"
 - "vw Task Details (Including Inactive)" and "Tasks (Including Inactive) for Job" with "Files for Tasks (Including Inactive)" mapping TaskID to JobID -> "DO NOT USE – Files for Tasks (Including Inactive)"

RFP/Award History

Award Accepted on Behalf of Vendor Logging

Added logging for "Award accepted on behalf of vendor". When a user accepts an award on behalf of a vendor, it will log on the Job Change Log and on RFP Manager – View Bids – RFP/Award History.

RIMSCentral

Proposed Delivery Date

When a vendor used a decimal point in their proposed delivery date, the fee amount would not carry over into the award and the due date would not calculate correctly. Non-portfolio bids have been updated in RIMSCentral to append "weeks" if the vendor enters a numeric value (with or without a decimal), or a range (e.g. 1-5), followed by any of the following time period reference texts and will auto-compute the award delivery date:

- YEAR (converted to 365.25 days) = 'year', 'years', 'yr', 'yrs', 'yr.', 'yrs.', 'y'
- MONTH (converted to 30 days) = 'month', 'months', 'mo', 'mos', 'mo.', 'mos.', 'm'
- DAY = 'day', 'days', 'd'
- WEEK (converted to 7 days) = DEFAULT if none of the above are used

The date will be converted to the computed date in calendar days. If the computed date is a holiday or weekend, it will be moved to the next business day. The exception to counting calendar days is when the user specifies "business day" after the numeric value (e.g. "4 business days or 1 bus day"). Business time period, other than "days", is considered a calendar time period. Ranged delivery dates like "1-5 days" or "1 to 2 weeks" will use the last mentioned numeric value to compute the award delivery date ("5 days" and "2 weeks"). Note this will resolve a range of different time periods to use only the first time period found e.g. "1 day to 2 weeks" resolved as "1 day". If the format is not date or first part is not numeric, the Award Delivery Date will be blank.

No change to Portfolio Bid Delivery Dates.

Bidding Without a Certification

Some vendors were receiving a message that their certification was expired and were unable to place a bid. The issue was related to a RIMSCentral configuration that checks for expired state certifications. The issue was resolved. When RFP is sent as requiring state certification ('Require vendor certification prior to acceptance = Yes' or configuration 'bankRFPTemplateRequireCert = False'), state certification should be required only at the time the vendor opens the award page and the vendor has no existing state certification.

Scorecard**Weighted Score Calculation**

The overall score was not calculating correctly when scorecard was set to compute selected rows only and N/A selection was getting included as '0' in overall rating. Resolved issue so that rows that are not selected or N/A is selected are not included in the score average computation for overall rating. If rating is a calculated value based on visible sub score ratings, the script was updated to recalculate scores when scorecard configuration is changed.

NOTE: As part of the 8.23.0 deployment, the overall ratings will be corrected on lender scorecards when the scorecard configuration is set to compute selected rows only.

Service Request**Cross Collateralization Field**

When 'IsCrossCollateralization' field contained more than 167 characters, the SRF printable view would display the text as running off the page. The issue was resolved by removing nowrap styling on dependent fields on the SRF printable page.

SRF Addressees for Report

When multiple addressees for reports were entered on the service request, the last addressee entry would duplicate in all the rows when the page was saved. Resolved the issue so that the original list of addressees will save properly.