LIGHTBOX

RIMS®

Release Notes – 8.36.0

November 16, 2023

RIMS®

VERSION

8.36.0

Real Estate Information Management System (RIMS) Version 8.36.0 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

API

RIMS API
Added project number search capability in RIMS API. Task and Job GET requests will now contain a link to their service request.

Dashboard

Sort Order
Resolved issue where the sort order for due date was not sorting correctly by date.

Engagement Letter and Invoice Management

Engagement Letter and Invoice Management
Resolved issue with logo image in an engagement letter template where customer firewalls would show a "HTTP Directory Traversal Request Attempt" warning.

File Link

Assignment Pages
Resolved issue where job attachment modal would not open on assignment pages.

Import Vendors

Login for Import Vendors
Resolved issue where users did not receive an error when they used an incorrect password. User will now receive an error when either the login ID or password are incorrect.

Insufficient Data

Insufficient Data
When task is in Insufficient Data status and the Disposition Type is set to a value, the user will get a confirmation prompt when the task gets saved.

```
Setting the disposition type will take the task out of insufficient data.
Do you want to continue?
[Yes] [No]
```

Selecting ‘Yes’ will submit the form as expected and the status changes to either Cancelled, Completed or Unpaid.

Selecting ‘No’ will reset the Disposition Type and Complete Date to blank and not submit the form.

Job Manager Delegation

RIMSCentral Email

Corrected sending of delegate email on Email Contact JM from RIMSCentral award page. The email will be sent individually to the two Job Managers unless vendor checks “Send Copy”. For “Send Copy”, the email will be sent as one for all recipients with vendor as the CC.

Notice Management

Rule for Job Type

Resolved issue where notice management rule for job type was not correctly filtering by job type.

Bid Authorization Response Past Due Scheduled Notice

Resolved issue where the bid authorization response past due notice was triggered when the Job Manager awarded the bid without bid authorization from the Account Officer. If the RFP has any award activity, the notice will not trigger.

Pay Invoice

Batch Column

Resolved issue in Pay Invoice where checking the Batch column would always show “No” in the previous payment(s) column.

Previous Payment(s)

G/L Account #	Invoice #	Invoice Date	Invoice Amount	Payment Date	Batch	Payment Comment	
987654	12345	06/23/2022	$300.00	11/08/2023	Yes	(Included in Batch ID #258 on 11/7/2023 4:26:39 PM PST)	
		Total:	$300.00				

Portfolio

RIMS SITE CHANGES FOR PORTFOLIO

The Create Portfolio page will order tasks by Job Type and Task Code by default to assist users in creating a portfolio of properties.

Added ‘Selected Task Count’ indicator to the Create Portfolio page.

Selected Task Count: 8

Only allow tasks with a status of ‘Not Started’ or ‘Not Started-Hold’ to be added to a portfolio.

- Fixed Task Number sorting to be dependent on actual numeric values of Job Sequence (if numeric) and Task Sequence. Job Sequence with non-numeric

values will be listed and sorted first before numeric values; they will be listed and sorted last if the sort is reversed.
- Relabeled ‘Project Number’ on Portfolio Manager to ‘Task Number’.
- Task Number column will always be present on Create/Edit Portfolio page and on Portfolio Manager top list.
- Added Task Number column on Bid Breakdown sections.
- Fixed spacing issue on Bid Breakdown modal.
- Removed portfolio Signatory and Office Location on View Bids grid, Award link page, View Awards, Bid Breakdown when it is a portfolio RFP.
- Removed filtering on Portfolio Manager top section grid for Task Number column.

Bid submitted and bid modified change logs on individual tasks in a portfolio have been updated to reflect allocated bid fee based on updated portfolio bid fee and total bid fees, like how task fees are set when an award is made.

Resolved subsequent issues in award workflow where customers removed a task from one portfolio and associated it with a different portfolio.

If Pre-Engagement Authorization question has been included at the service level and either “yes” or “no” has been selected, a new Pre-Engagement Authorization column will appear on View RFP, View Bids and View Award pages per property.

Task Code	Task Status	Pre-Engagement Authorization
APR	Contracted	
APR	Contracted	Bid Authorization Required
APR	Contracted	

Resolved issue where batch update allowed setting of the disposition type on Contract Pending or Contract Pending-Hold tasks.

Resolved issue where tasks were allowed to be deleted if they were part of a portfolio.

Removed Signatory Info and Office location information in the Bid Information section in Portfolio Manager.

Bid Information

Vendor Name
QA_VN3C QATester

Proposed Fee
$ 48,000.00

Proposed Delivery Date
01/15/2024

Prior Services
Yes

Bid Comments
Bid Comments1 portfolio =48,000

Added Signatory Info and Office location columns on Bid Breakdown in Portfolio Manager.

Bid Breakdown

Task Number	*Property Address*	*Signatory Info*	*Office Location*	*Delivery Date*	*Fee*	*Award Fee*
23-000157-01-1	341 Piercy Rd San Jose CA 95138	Portfolio Signatory Info1	Portfolio Office Location1	01/01/2024	$111.00	$79.57
23-000157-03-1	1201 South Main Place Livingston CA 96120	Portfolio Signatory Info1	Portfolio Office Location1	01/02/2024	$222.00	$158.25
23-000157-04-1	1202 South Main Place Rainbow CA 93940	Portfolio Signatory Info1	Portfolio Office Location1	01/03/2024	$333.00	$237.38
23-000157-05-1	1203 South Main Place Livingston CA 96120	Portfolio Signatory Info1	Portfolio Office Location1	01/15/2024	$1,111.11	$792.08

Removed Signatory Info and Office location columns on View Bids page in Portfolio Manager.

Approved	Vendor	Date Entered	Prior Service	Award	Rating	Proposed Fee
☑ Authorized	QA_VN3C QATester ExactBid Inc.	11/7/2023 5:43:40 PM EST	Yes	Cancel		~~$48,000.00~~

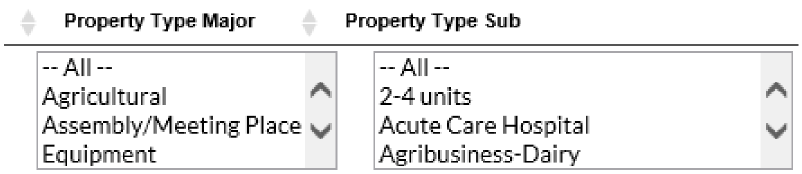
Resolved issue where user could create a portfolio with two tasks on the same property. In the portfolio creation screen, there can only be one task assigned to each property. The Select All box should not function if there is already a task of the same job type selected from a property previously.

Create/Edit portfolio screen will no longer block adding tasks with a different service office or no service office of the same job type.

Resolved issue where there was an error of “Could not find award” on a portfolio when “Accept On Behalf of Vendor” is selected.

Resolved issue where there was an error of “Could not find award” on a portfolio when “Accept On Behalf of Vendor” is selected and there is no engagement letter expected for the job.

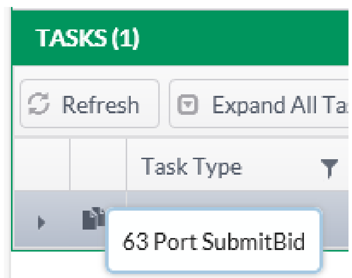
Added Property Type Major and Property Type Sub columns to create portfolio page. Columns can be filtered and the filters are multi-select.



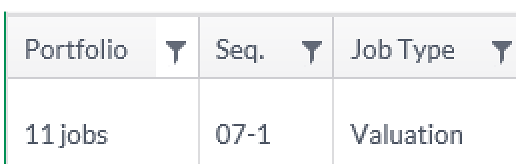
Deleted tasks will no longer show up on create/edit portfolio screen.

Added smart field for Portfolio Name in Create Invoice.

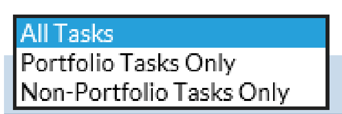
Added portfolio name when hovering on portfolio icon on the task.



Removed "PFL" next to Seq. value. Added Portfolio column on Batch Update grid which shows the Portfolio Name only if one of the tasks are part of a portfolio; otherwise, no Portfolio column.



Added filtering on All Current Assignments and My Assignments pages for All Tasks, Portfolio Tasks Only and Non-Portfolio Tasks Only.



Added the following portfolio events to the Project change log:

- Portfolio created
- Portfolio name change
- Portfolio description change

- Portfolio task(s) added
- Portfolio task(s) removed
- Portfolio deleted
- Portfolio RFP sent
- Portfolio RFP resent
- Portfolio RFP amended
- Portfolio RFP canceled
- Portfolio bid sent
- Portfolio bid fee updated
- Portfolio bid delivery date updated
- Portfolio bid canceled
- Portfolio bid sent for authorization
- Portfolio bid approved
- Portfolio bid awarded
- Portfolio award amended
- Portfolio award accepted
- Portfolio award rejected

Bid has been updated to be triggered when portfolio Fee/Delivery Date is modified, OR when any of the single bids' Fee/Delivery Date is updated. Cross out of fee on the grid only occurs when the portfolio fee is updated, not when an individual fee is updated instead, same thing with Delivery Date.

Fixed issue when Portfolio Bid Fee is not the same as Total Bid Fee which always was logging Bid Modified change log, even if there were no portfolio/single bid fee changes.

Create/edit portfolio screen will only display external tasks.

When placing or updating a bid, if Portfolio Signatory or Office Location is populated but the same field isn't filled out for every individual bid show a prompt to user:

Signatory Info is missing for some properties. Do you wish to apply the Portfolio Signatory Info to those properties?
Yes -> backfill individual bids with the portfolio level data
No -> ignore the prompt and place/update the bid
Cancel -> close the prompt

On Portfolio Manager -> View Bids -> Total Fees link modal

- Increased width to be 75% of available parent space.
- Made the modal resizable that can be maximized in the available parent space.

- Portfolio bid information on the left side will now show the field value below the field label (instead of next to each other).
- Added some spacing on the Bid Breakdown table.

On Portfolio Manager -> View Bids -> Award link
- Added some spacing on the Bid Breakdown table.

On Portfolio Manager -> View Award
- Added some spacing on Bid Breakdown table.

On Job Detail -> Bids (count) link modal
- Increased width of Bid Authorization modal to be 90% of available parent space, width of Portfolio bid information link ("here") modal 90% of Bid Authorization page.
- Made the modals resizable that can be maximized in the available parent space.
- Portfolio bid information on the left side will now show the field value below the field label (instead of next to each other).
- Added some spacing on the Bid Breakdown table.

RIMSCENTRAL SITE CHANGES FOR PORTFOLIO

Added 'Portfolio' column which displays the portfolio identifier/name on Awards, Bids, RFPs, History tabs. The column will be blank if a non-portfolio project. The portfolio column will only appear if there is at least one row with a portfolio project. The portfolio name has been appended to the project number and enclosed in parenthesis on the Award, Bid and RFP detail pages. This information will be backfilled on portfolio projects.

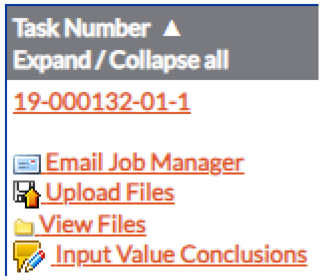
Project Number	Portfolio ▼
19-000132-PFL	Portfolio Test w/3 Properties

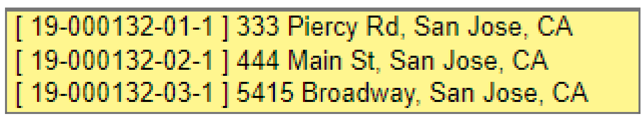
Project #: 19-000132-PFL (Portfolio Test w/3 Properties)

Resolved issue where vendor could not see the buttons at the bottom to select a file if too many files were already selected. Portfolio upload files modal on RIMSCentral will now display a vertical scrollbar when uploading many files at once.

- Fixed Task Number sorting to be dependent on actual numeric values of Job Sequence (if numeric) and Task Sequence. Job Sequence with non-numeric values will be listed and sorted first before numeric values; they will be listed and sorted last if the sort is reversed.
- Portfolio tasks on RIMSCentral and RIMS core side will show in the same order—Project Number, Job Sequence and Task Sequence.

- Relabeled ‘Job Number’ column to ‘Task Number’.
- Added Task Number to property list on portfolio file upload when selection of property is needed, sorted by the Task Number.

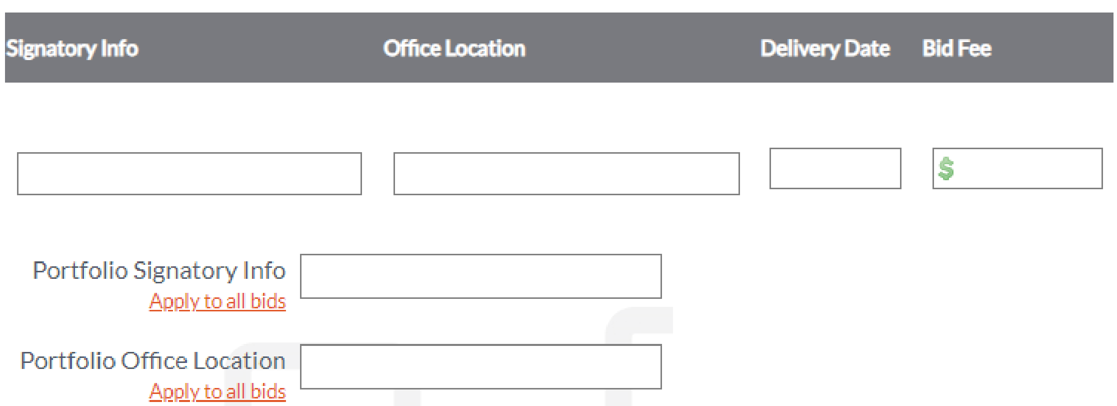




Resolved issue where RIMSCentral was showing the incorrect number for the portfolio count when amending a portfolio RFP.

Resolved issue where Portfolio Invoice did not display the properties if there were more than 27 properties.

Added Signatory Info and Office Location columns to each individual bid row on portfolio RFP/Bid pages. Moved portfolio Signatory Info and Office Location textboxes to the same area with the portfolio Bid Fee and Delivery Date where user can apply value to all bids.



Project Console

Property Summary

Added Address2 field in the property summary section. The field will only show if the Address2 field is populated on the property page.

Address | Address2
355 Golden Knights Blvd | Unit 2

Project Search

Project Search

Account Officers can now search for projects containing & or # in the project name. Project search results will now preserve any extra spaces between words in columns for Project Name, Address, Borrower Name, AO Name and Requester.

Reports

Ad Hoc Reporting

Corrected ‘vw bid details’ Fee field to correctly reflect portfolio bid fee rather than individual bid fee.

Added following columns to ‘vw property details’ and ‘project/job/task/property’ view

- Ground Lease Description
- Flood Plain Surveyed
- Is Flood Plain
- Flood Plain Description
- Flood Plain Size
- Green Certifications

Added columns to ‘vw App Summary Details’, each new field has 3 versions—Appraiser, Revised and Reviewer

- Estimated F,F&E
- Estimated Value (net of Land and F, F&E)
- All allocation fields

All Current Assignments/My Assignments/Dashboard

For customers using All Current Assignments snapshot view, the snapshot date and time will be displayed on the All Current Assignments/My Assignments (default/side-by-side) and in Excel format, as well as snapshot date/time next to the individual status reports. On Dashboard, instead of the time from when data was cached upon login and a refresh button, it will display the time based on snapshot date/time with no refresh button as “Information snapshot as of (time elapsed from snapshot date time)”.

Report Snapshot As Of: 11/15/2023 9:50:04 AM EST

NEW As Of 11/15/2023 9:50:04 AM EST

Snapshot interval can be set in multiples of 5 minutes.

Bid Status Report

Resolved issue where attempting to sort fee columns caused an error. Columns that can be sorted should now sort properly on the report.

Export Users Report

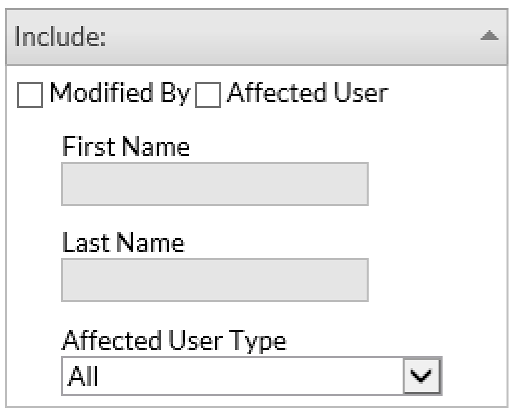
Job Manager and Vendor Job Manager will now show their certifications under the Certification Type column. This change resolved the variance between Basic and Advanced records for Job Manager user type.

Added certification license number information after the type of certification in the Certification Type column in the report.

CA-Licensed - Residential - 1111 (05/18/2017)
KY-Certified - Residential - 10142014 (10/28/2016), CA-Certified - Residential - 3142016 (03/31/2016), AK-Certified - General - 3152016 (03/31/2016)
GA-Certified - Residential - 1234 (04/28/2016), CA-Certified - Residential - 123 (03/31/2016)

User Change Log Report

Added User Type filter and User Type column to User Change Log report.



User Type column in the User Change Log Report is now visible and called Affected User Type.

Date and Time	Modified By	Affected User	Affected User Type	Action	Old Value	New Value
11/8/2023 1:59:24 PM...	QA_CA3 QATester	SSO_JM_14Char1 te...	Job Manager	Deleted	Undeleted	Deleted
11/8/2023 1:58:42 PM...	QA_CA3 QATester	SSO_JM14_Char1 Te...	Job Manager	LastName	Test	Tester1
11/8/2023 1:58:24 PM...	QA_CA3 QATester	SSO_JM14_Char1 Te...	Job Manager	Address	111 SSO JM4 Auto Ave	SSO 14 char
11/8/2023 1:58:24 PM...	QA_CA3 QATester	SSO_JM14_Char1 Te...	Job Manager	FirstName	SSO_JM4	SSO_JM14_Char1
11/8/2023 1:58:24 PM...	QA_CA3 QATester	SSO_JM14_Char1 Te...	Job Manager	Login ID	SSO_JM4	SSO_JM14_Char1

Vendor Handling Fee Report

Added 'Service Office at Project/Job:' label to field in filter area of report.

RIMSCentral

CAPTCHA Image

Resolved issue where CAPTCHA image was not showing for vendors in RIMSCentral.

Service Request Template (SRF)

Service Types

Resolved issue where groups could not be sorted on the Service Types page.

Short Form Services

Added a comment line on Additional Requirements page regarding a short form service:
“For a short form service, fields checked to display on this Additional Requirements page MUST be checked on the appropriate Service Request or Property page in order to store data in the database.”

Third-party Orders

Job Change Log for Boxwood Order

Resolved issue where the job change log for Boxwood orders was reflecting the Product ID as the fee initially. Fees and change logs will be corrected on Boxwood tasks.

Cancel LRES Third-party Order

Resolved issue where users in RIMS could not cancel a LRES third-party order if LRES had canceled the order on their side. RIMS will now allow the user to proceed with the cancellation. In the order status, the user will see this message:

```
There has been no further action from LRES based on the status of the order, please confirm the cancellation with
LRES at your discretion.
```

UCDP Submissions

Optimized UCDP Submission Time

Improved turnaround time for UCDP/FHA orders.

User Management

Account Officer User Attachment Permission

Changed the definition of an open property to mean being either associated with an active task with no Complete Date, not associated with an active task, or associated with an unsent service. For example: An Account Officer adding a new service to a property with no open tasks will be able to upload attachments to the new service on the property.

Job Manager Automation Time Zone

Resolved issue where Automation Time Zone for Mountain Time failed converting the data type value causing an issue with the user change log.

Resolved separate issue where Automation Time Zone was not using the correct time zone for a TN zip code.

User Change Log

When lending group is changed on a user profile, the logs will now reflect the modifying user instead of System CA.

Resolved issue with ‘Browser’ and ‘IP’ column were not always showing in the User Change Log.