RIMS®

# Release Notes (UPDATED) – 8.37.0

March 14, 2024

LIGHTBOX

RIMS®

VERSION

8.37.0

Real Estate Information Management System (RIMS) Version 8.37.0 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

### Document Management V2

#### Online Review Document (ORD)

A new tool to self-manage review documents within the RIMS application. Eliminate Internet Explorer requirement due to Active-X dependency in current process. New review documents created with ORD and updates to documents created with ORD are available immediately for use. Refer to the Help Index for instructions on creating the Document Template and Review Documents using the new Online Review Document (ORD) feature.

***Contact a CSM or Support to enable.***

## QUALITY & USABILITY IMPROVEMENTS

### API

#### RIMS API – Draft Functionality

Added ability to submit a draft service request form via the RIMS API. The Account Officer on the request via the API must be a user in the RIMS application. The Account Officer or Requester on the draft service request will need to complete submission of the draft service request in RIMS.

If interested in this feature in the RIMS API, please request link to the current API documentation.

#### RIMS API – File Attachment

Resolved issue where files were not able to be attached from the RIMS API.

NOTE: API User master role should have View/Add/Update permissions checked for Job Attachments. This must be done by a CSM or Support.

## Content Tables

### G/L Accounts

Resolved issue where two lending group columns were showing in the G/L Accounts lookup table page.

## Job Comments

### Files Attached to Job Comments

Improved performance when fetching files attached to Job Comments.

## Notice Management

### Rule for Job Type

Resolved issue where notice management rule for job type was not correctly filtering by job type. This was an additional fix after the 8.36.0 release changes.

## Portfolio

### Portfolio Identifier Name

Resolved issue where typing the same portfolio identifier name would wipe out all the selections.

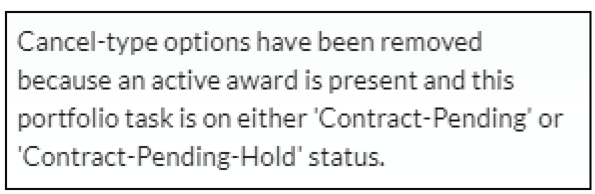

### Portfolio in RIMSCentral History Tab

Resolved issue where vendor was unable to open a portfolio in the History tab for portfolio projects moved to the History tab prior to the changes in the 8.36.0 release.

## ✱ Newly Added

### Cancel Disposition Type Options Not Allowed for Contract Pending Statuses

Removed cancel disposition type options in Disposition Type field when the task is part of a portfolio, and the task status is either Contract Pending or Contract Pending-Hold. A message shows up when cursor moves over the Disposition Type field: “Cancel-type options have been removed because an active award is present and this portfolio task is on either ‘Contract-Pending’ or ‘Contract-Pending-Hold’ status.”




## Reports

### Ad Hoc Reporting

View Only permission for AdHoc Reporting has been updated to hide Personal Reports and Global Reports tabs.

Resolved issue where Change Date field was no longer working in AdHoc Reporting.

- Report data’s time zone will be replaced with user’s time zone, except for scheduled reports which will always be in Pacific time zone.
- Redefined format of General Date as date with timestamp and time zone name

- Modified Change Date and Date RFP Sent To Reviewer to have format of General Date by default in new reports; existing reports that have these columns will keep the Short Date format

### Completed Services Summary Report, Services Summary Report, Vendor Scorecard Report

Resolved issue where Property Type link was not opening the expected modal window. Resolved issue when there is a selection on Job Manager or Account Officer.

Resolved same issue found in Task Codes – RFP when clicking on Property Type link.

### Detail Performance Report

Updated the report calculations for turn, hold, and variance days to match calculations used in the Job Manager Service Level Performance Report. The columns affected were:

- External Portion of the Job
  - Gross Ext. Turn Days
  - Net Days
  - Variance from Std.
- Internal Task Measurements
  - # of Days on Hold
  - Net Days
  - Int. Task Gross Turn Day
  - Variance from Std.
- Total Job Turn Times
  - Days on Hold
  - Total Turn Time
  - Net Days
  - Variance from the Std.

### Export Users Report

Resolved issue where Export Users Report was returning an error when Advanced Export Type was used.

### Job Manager Service Level Performance Report

Fixed date being used to populate Vendor Upload or Task Complete column. The column now shows the upload date of the final report from the vendor (Vendor Upload (A), (C) or ( E)). If no Vendor Upload document type, the task complete is shown when the task is completed.

### Vertical Scorecard Report

Resolved issue were report results were not providing all tasks in the date range. Modified report such that only active (non-deleted) jobs/task are returned, and include only review tasks with vendor scores, and tasks linked to review tasks with vendor scores.

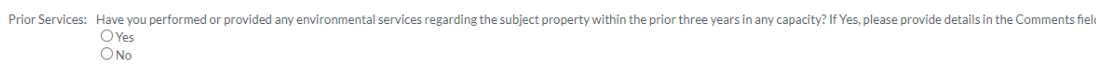
## RIMSCentral

### Contact Information Phone Numbers

When vendor removes a phone number from their contact information in RIMSCentral, a message will display if the user did not click the Save button at the bottom of the page to complete the operation.

### Prior Service Question When Submitting Bid for Non-Appraisal Job Type

Added ability to expose 'Prior Services' question in Bid section for environmental and construction job types. Environmental ex.: 'Have you performed or provided any environmental services regarding the subject property within the prior three years in any capacity? If Yes, please provide details in the Comments field.'




***Contact a CSM or Support to enable.***
***NOTE: The message can be customized to your desired verbiage.***

## Service Request Form (SRF)

### Edit Special Condition Fields

Resolved issue where a change to a Special Condition field was not saving when using View/Edit to update the information on a submitted SRF.

## System Settings

### Engagement Letter and Invoice Management
### Notice Management

HTML Source on Engagement Letter and Invoice Management and Notice Management is limited to Support and CSM users only.

## Third-party Orders

### Task Cancellation If Order Has Not Been Received By Third-party Vendor

Resolved issue where user could not cancel a third-party order when the third-party vendor had not received the order. If "Order submitted" does not exist in the job change log and the order is not in a received status, the task may be cancelled.

### Update LRES Name & Logo to Ascribe

**LIGHTBOX UPDATED THE FOLLOWING FOR VENDOR NAME CHANGE TO ASCRIBE**
PROJECT CONSOLE 3$^{RD}$ PARTY STATUS:
Update logo.
Update "LRES Reports" to "Ascribe Reports".

CREATE/VIEW ORDER POP-UP:
Update logo.
Update “LRES Reports” to “Ascribe Reports”.
Logo Message referencing Street Address limit now references Ascribe.

SERVICE PAGE:
Update logo.
Logo Message referencing Street Address limit now references Ascribe.
Updated verbiage to read “Comments to Ascribe”.

CONTENT TABLES – TASK CODES:
Updated Service Provider option to Ascribe.

UPDATED PERMISSION NAME:
Ascribe Permission.

RECEIVED REPORTS:
Received reports will be attached to RIMS tasks prefixed with “ASCRIBEREPORTS”.

**CUSTOMER RESPONSIBILITIES FOR VENDOR NAME CHANGE TO ASCRIBE**
VENDOR PROFILE:
Update Vendor Company Name on vendor profile.
Update email address per Ascribe direction on vendor profile.

SERVICE REQUEST TEMPLATE:
Update Service Request Template Group heading(s), if necessary.
Update Service Name(s), as appropriate.

CONTENT TABLES – TASK CODE(S):
Update Task Code Name(s) and description(s), as appropriate.

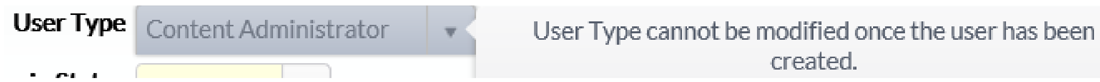
***Contact a CSM or Support with any additional questions regarding LRES name change to Ascribe.***

## User Management

### Block Changing User Type

Resolve issue where Content Administrators have changed user type on a user which causes an issue trying to retrieve that user’s information as the original user type and other issues resulting from user type changes.

The User Type drop-down will now be read-only on the edit user modal. Once a user is created, the Content Administrator will be blocked from changing the User Type.




### User Change Log

Resolved issue where browser agent and IP where not displaying in the change log when user preferences were updated.