LIGHTBOX

RIMS®

Release Notes – 8.38.0

May 23, 2024

RIMS®

VERSION

8.38.0

Real Estate Information Management System (RIMS) Version 8.38.0 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	**RFP: Multiple Selections in a Scope Item** Resolved issue to return selected scope option names rather than numeric values on scope items that allow multiple selections.
Content Tables	**Job Types** Removed ability of Content Administrators to add Job Types. NOTE: Job Types are controlled as part of the RIMS application.
Dashboard	**Snapshot View** Resolved issue where data was not refreshing correctly when snapshot view is enabled.
Files	**Batch Sharing Files with Related Projects** Added the following fields to Batch Share tab: • New File Short Name • New File Description • New Document Type If the new field(s) is/are filled with a value, the file shared with the other jobs/tasks/properties will use that value for upload dates, etc. If the new fields remain blank, the shared file will use the original file's value.
My Assignments & My Jobs	**Updated Permission** My Assignments and My Jobs will no longer be available to Content Administrators. The permissions have been updated to mention "My Assignments (for JM/VJM/PA users only)" and "My Jobs (for JM/VJM/AO users only)." Non-JM/VJM/PA users that have access to My Jobs or My Assignments will get redirected instead to All Current Jobs and/or All Current Assignments if they have permission to those pages.

Notices

Emailing From Scorecard

Updated emailing from scorecard.

Default email will come from scorecard notice template.

If a scorecard notice template is not active or there is no sender email address, the Email section in the scorecard will not be available.

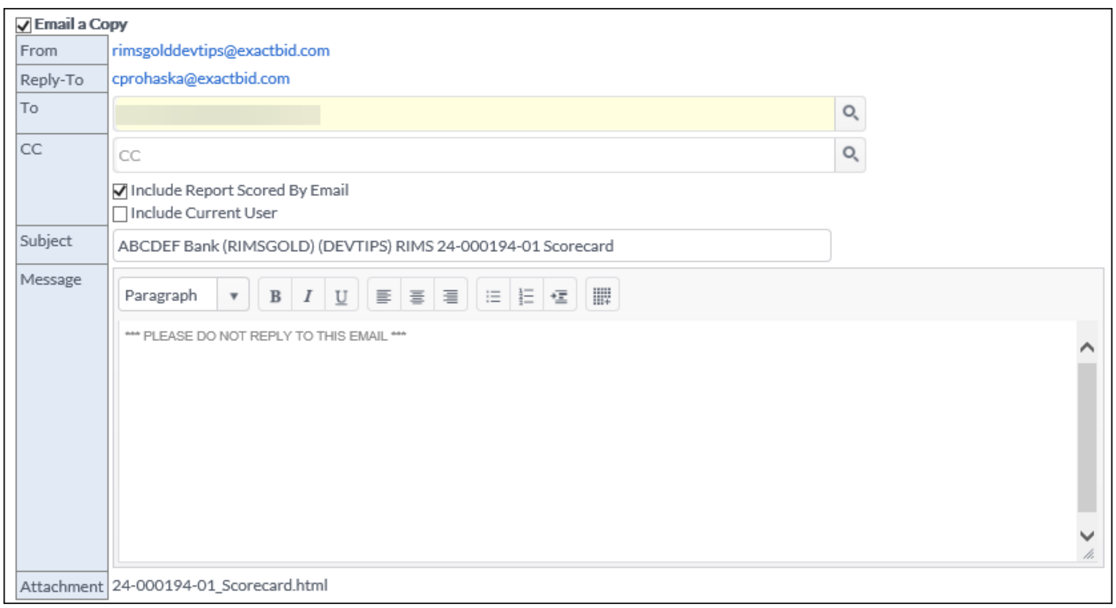
From row will be read only and follow defined bankEmailPolicy on customer's site. Contact Support or your CSM with any questions.

Added Reply-To address (always read only) if different from the From email address. If the same as From, the row will not show up. This field will show based on a configuration. Contact Support or your CSM with questions on the configuration setting for your site.

Added checkboxes to Include Me (current user) and Include Report Scored By in CC. If one of the email matches the default recipients when the page is loaded, they will be marked as checked.

Added Message textbox which contains the default template content.

Added Attachment row which indicates the file name of the scorecard page to be attached to the email.



Job Type Rules

Resolved issue with notices recognizing job type rule. The issue was related to multiple conditions tied to a notification template and one of the recipients is a Task

JM or Job JM with an active delegate user. The delegate user was picking the template used for the first condition even if the main JM is not using the same template.

RIMSCentral Report Upload Notice

Resolved issue RIMSCentral report upload notice was not pulling in address line correctly.

Online Review Document

Document Template Editor

Resolved issue where the user was unable to get the cursor below a table if there is no text below the table. Added a toolbar button to “Insert Space Below Table”.

Listed for Sale & Pending Sale Smart Fields

Corrected data populating “Property Listed For Sale” and “Property Pending Sale” smart fields.

Print Button

Updated label on Print button to Export to PDF.

Review Documents V2 Button

Resolved issue where Review Documents V2 button did not display on Data Services job type review task.

Review Document Hard Page Breaks

When creating a review document, hard page breaks will be visible in Chrome or Edge. The page break indicators will not be visible in Edge with IE enabled.

Reviewer License Smart Fields

Resolved issues with reviewer license smart fields.
Reviewer Certifications: Renamed to Reviewer Cert Comments (all). This field shows all the comments for each state certification in the reviewer’s profile.
Reviewer License Expiration Date: Displays the Expiration Date for the license associated with the state on the property.
Reviewer License Number: Displays the Reviewer License Number associated with the state on the property.
Reviewer License State: If the Reviewer has a license for that state, the smart field will display the state of the current property.

Smart Fields - New

Added new smart fields:

- Lien Position Amount
- Lien Comments
- Collateral Loan Number Other

Source Code Copy

Resolved issue where default radio buttons “checked” values did not carry over when Support or CSM copied Source Code from UAT to Production site.

Portfolio

Bid Authorization Approval

When the Account Officer is authorizing a bid for a portfolio, the Project Number will not include the job sequence. Only the base project number will be displayed for that field.

Create RFP Portfolio Task Code Name

Adjusted column size of Job Type and Task code in RFP Manager grid for portfolios to accommodate larger task code names.

Delivery Date Field and Portfolio Delivery Date Field

Updated Delivery Date fields on portfolio bid to accept non-date values when configuration is enabled. Contact Support or your CSM to enable the configuration.

Property Window Opening on Portfolio of Sizable Number of Properties

Resolved issue where property window was opening without data on portfolios with a sizable number of properties.

RFP/Award History on Portfolio View Bids

Added portfolio change logs in the RFP/Award History on portfolio View Bids page.

RIMSCentral Prior Service and Comments

On the RFP Portfolio Bid page in RIMSCentral, the following changes were made:

- Added a new column for Prior Service/Bid Comments that opens a modal to enter information for individual bids.
- Added “Apply to all bids” next to the Prior Service and Bid Comments inputs at the bottom of the page. Using this button will apply the information in these fields to all bids.
- Added a Message next to the “View” Button that shows if Prior Service is marked Yes or No. If it shows an asterisk, that means the question has not been answered. If it shows a Yes, that means Prior service is marked Yes but there is no bid comment.

- The text for the prior service has been updated based on the type of job that the portfolio is attached to. This value can be updated through a configuration by Support or your CSM.
- Requiring a response for Prior Service and Comments is also controlled by a configuration which can be updated by Support or your CSM.

RIMS Core Prior Service and Comments

Bid information on portfolio view Bids & View Award updated:

- On the breakdown table, columns Prior Services and Bid Comments were added between columns Office Location and Delivery Date.
- Proposed Fee and Proposed Delivery Date were moved from the left side to the top of the breakdown table.
- Remaining left-side data which contained portfolio-level information was removed.
- Bid Breakdown header row was removed.
- Vendor Name was moved to the Bid Information header on View Bids > Total Fee popup (RFP Response Detail).
- Initial width/height of View Bids > Total Fee popup (RFP Response Detail) was increased when it loads, and size can still be adjusted as before.
- If all Prior Services value are blank, the column will not show.

Report

AdHoc Reporting

Corrected vendor first name on Logi AdHoc Invoice for Task view.

Resolved issue where the user was unable to select a specific report on the dashboard panel.

AdHoc Reporting - New Roles With Restrictions

- Added “AdHoc Reporting – Global Reports Access” under “AdHoc Reporting” to Role Permissions/User Permissions list.
- Any View/Deny changes on “AdHoc Reporting” will apply to “AdHoc Reporting – Global Reports Access”.
- If “AdHoc Reporting” Deny is checked, “AdHoc Reporting – Global Reports Access" Deny will be checked as well and View unchecked (View cannot be checked).
- If "AdHoc Reporting" View is checked, "AdHoc Reporting - Global Reports Access" View will also be checked. "AdHoc Reporting For existing roles with full access on "Adhoc Reporting", "Adhoc Reportiing - Global Reports Access" View will be checked by default.- Global Reports Access" can be changed to Deny or View can be unchecked afterwards.
- If "AdHoc Reporting" View is unchecked, "AdHoc Reporting - Global Reports Access" View will be unchecked as well.

- "AdHoc Reporting - Global Reports Access" Add/Update/Delete will not be editable and remain unchecked.
- For existing roles with only Deny or View checked on "AdHoc Reporting", "AdHoc Reporting - Global Reports Access" Deny will be checked by default. This will be consistent with hiding Personal Reports and Global Reports tabs for users with View Only permission to AdHoc Reporting.

AdHoc Reporting -Shared Reports New Folder Roles

Added new Logi AdHoc permissions "Basic RIMS User – View Only With Global Reports" and "Basic RIMS User – Without Global Reports".

Added the following new Logi AdHoc roles that match up to the related new Logi permissions.

- ContentAdministrator-ViewOnly-With-Global-Reports
- ProductionAdministrator-ViewOnly-With-Global-Reports
- JobManager-ViewOnly-With-Global-Reports
- VendorJobManager-ViewOnly-With-Global-Reports
- AccountOfficer-ViewOnly-With-Global-Reports
- ContentAdministrator-Without-Global-Reports
- ProductionAdministrator-Without-Global-Reports
- JobManager-Without-Global-Reports
- VendorJobManager-Without-Global-Reports
- AccountOfficer-Without-Global-Reports

Applied the same Shared Folder setting as default of the following roles to the new Logi AdHoc roles:

- {UserType} -> {UserType}-Without-Global-Reports
- {UserType}-ViewOnly -> {UserType}-ViewOnly-With-Global-Reports

Applied new Logi AdHoc roles based on the AdHoc Reporting and AdHoc Reporting - Global Reports Access permissions.

All Current Assignments / All Current Jobs / My Jobs / Dashboard

If any of the Assignments menu links (All Current Assignments, All Current Jobs, My Jobs, Dashboard) are accessed by a bookmark as a default page upon logging in or upon clicking the link, and the user has no View access to the specific page, the following is the order of pages the user gets redirected to depending on the user's View access on the expected page. If the user has no View access to the first page, they get redirected to the next on the list instead, and so on:

1. Assignments > My Jobs (JM, VJM, AO) – if redirected from Dashboard or My Assignments only
2. Assignments > My Assignments (JM, VJM, PA) – if redirected from My Jobs only

3. Assignments > All Current Assignments (PA, CA) – if redirected from My Assignments only
4. Assignments > All Current Jobs (PA, CA)
5. System Settings
6. Reports
7. Tools > Reference Documents
8. Page saying “You are logged into RIMS”

Other changes:

- If user has no access to any report, the Reports on the top menu will be unavailable
- On Role Management permissions, “My Jobs (for JM/VJM/PA only)” renamed as “My Jobs (for JM/VJM/AO only)”

Archived Appraisal Indices Report

Resolved issue where an error was returned when an Account Officer clicked on the project number in the results of the report. The fix also resolved an issue with Account Officer project search.

Resolved issue where report was not recognizing state filter.

Detail Performance Report

Detail Performance Report will now correctly show “Report Upload Date” column with the upload date using the first occurrence of any of the following:

- Vendor uploads file to final report tab in RIMSCentral
- User on RIMS core side sets document type on file as Vendor Upload document type
- User on RIMS core side sets document type on file as Vendor Final Report document type

Calculation for “Report Received To Task Start” now uses the correct date from “Report Upload Date” column.

RFP Manager

Removed Scope Items

Resolved issue where RFP Manager page was not showing selected scope items that have been removed from template. The removed scope items will now be suffixed with “(Removed from template)”.

Added scope required logic on RFP edit page.

RIMSCentral

Exception Message in RIMSCentral Payment Management

Updated the error message in RIMSCentral when an alert message is returned from the payment service provider (PayPal).

Scorecard	**Updated Gross Turn Days, Net Turn Days & Variance Calculations** Gross Turn Days = Calendar days between task Start Date and Complete Date. Net Turn Days = Business days (excluding weekends and holidays from customer RIMS Holiday Schedule) between Start Date and Complete Date less number of days on hold. Variance = Calendar days between task Due Date and Complete Date. The task mentioned is the completed External Task either linked to the Review Task or is the actual Review Task. If that task does not exist and if the review task is a completed internal task, the computation will use that task's Start Date, Complete Date and Due Date. If the task is not completed (no Complete Date), the values for the three fields will be zero.
Service Request Form	**Cloning** Resolved issue when a project is being cloned and the project Account Officer's city has two records in the database. Resolved issue where selecting Cancel on search for Account Officer window while cloning a project returned a blank page. Hitting the Cancel button on the Account Officer Search on the create SRF page will now take the user back to the page they were previously on. **Services Page – Desired Delivery Date Calendar** Resolved issue where clicking on a second calendar icon on the services page caused the service fields to disappear. **Situs Insight** Vendor has discontinued Situs Insight product. Removed all references to Situs Insight on RIMSCentral.
Third-party Service	**First American Vendor** Resolved issue where the Resubmit Page on unsuccessful order submission could not be submitted if information is missing. If required data is missing, the user will be presented with a list of fields that need to be filled out. Updated property information gets sent in the order request to third-party vendor. Changed property information is updated in RIMS. Resolved issue where First American tasks were not transitioning from on hold to off hold task status after being in Received in Research order status.

Updated First American logo on Project Console 3rd Party Status, Order Form and Service Page.

Flood Vendor

Resolved issue where a flood service could not be submitted for missing information in fields. If required data is missing, user will be presented with a list of fields the user needs to fill out.

Ascribe (formerly LRES) Vendor

Added SBA Investment (Yes/No) to a new Ascribe order request if the project SBA Involvement (Yes/No Drop-down) has a selection. If the field is blank, the order request will not have SBA Involvement reference.

Changed file names, image files, class names and method names using name InsideValuation or LRES to Ascribe.

Boxwood Means Vendor

Updated Boxwood Means logo on Project Console 3rd Party Status, Order Form and Service Page.

CoreLogic Vendor

Updated CoreLogic logo on Project Console 3rd Party Status, Order Form and Service Page. Updated Flood Order Form to contain header like base Order Form. Header contains Service Provider Logo, Service Name and Service Description.

Vendor Profile

Vendor Performance

Resolved issue where scorecard comments would not display after sorting the project numbers in vendor performance on vendor profile.