RIMS®
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Release Notes – 8.2.6

August 12, 2016

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VERSION

8.2.6

ExactBid's Real Estate Information Management System (RIMS) Version 8.2.6 is a release for all RIMS 8 users.

These Release Notes provide a summary of bug fixes and performance improvements for the following noted areas:

NEW FEATURES & ENHANCEMENTS

API

API Search
- Added ability to search for jobs and tasks using API.

New Fields
- Additional Appraisal Summary information added to API
- Award added to API.
- RFP added to API.

Batch Invoice

Change Logging
- Added new job change log fields for vendor invoice moved to draft and vendor invoice removed from draft.

VJM External Fees
- For VJM external fees, batch invoice will pull secondary GL (if used) or primary GL if secondary GL is not used.

Configuration Settings

Account Officer Job Detail
- Account Officer Job Detail page is now configurable for MSP-related sites.

Content Administrator

RIMSCentral
- Task Codes - RFP: Option to configure Bid Type in RFP. CONTACT ACCOUNT MANAGER

Invoices
- Added logging when role is added to or removed from user profile.

Notices
- Disabled Account Notice added to Notice Management. This notice is enabled by default and required for site operation.

Project Console

Related Project Manager
- Project number is now a link that will take user directly to that project.

Logi Infrastructure

Ad Hoc Reporting
- Added Vendor Details to Ad Hoc Reporting.

Security

Bid Authorization
- In order to access the bid authorization page, the user needs to be logged into RIMS. The changer user indicated in the job/RFP change log is the user who accesses the page and authorizes the bid.

Content Administrator

Organizations
- Organization-enabled sites: When adding a new user with organization field exposed, lending group selections will filter by the organization.

Notices
- Resolved issue in notice management where a conditional statement was used within a repeater.

Engagement Letter
- Engagement Letter and Invoice Management: Resolved 'Toggle Full Screen Mode' icon that would not allow full screen mode to revert to original size.

CA Area
- When 'show deleted' checkbox is checked or unchecked, lookup table results will properly expose the expected records.
- When adding a new lookup item to a lookup table, the list will now be alphabetized after the save.

File Related

Job Comments
- On an upgraded RIMS 8 site, file attachments on legacy job comments will download successfully.

RIMSCentral
- Resolved issue where duplicate UAD files were showing on RIMSCentral after vendor upload.

General

Login Page
- Resized login box to prevent error and warning messages from overlapping with the confidentiality statement.

Engagement Letter
- Resolved issue where engagement letter did not appear as a Contract Document in attachments after Vendor accepted the award.

Related Project

Related Project Manager
- Resolved issue where AO and Borrower information was displayed from linked project.

Service Areas

RFP Manager
- Single county per state shows in RFP Recipients--Include Vendor Service Area selection.

Service Request Form

Printing
- Resolved SRF printing issues.

RIMSCentral

Engagement Letters
- Resolved issue where some engagement letters could not be downloaded.

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Awarding

RFP Manager
- Accept Award on Behalf of Vendor Link on RFP Manager > View Award can be controlled by a new permission under User Permissions at the master user type level or individual role level. By default, JM CA and PA will have the link available to them.

  Note: Contact Account Manager for MASTER USER TYPE SETTING.

Bid/Award

RFP Manager
- Printer icon now available on View Bid and View Award pages.

Project Console

Customization Framework
- Production Administrator field exposed on project summary section.
- Requester field exposed on project summary section.
- Property subtype is now included on property summary section of Project Console page.

Confirmation Messages
- Edit Job: Confirmation after save is removed; Notification pop-up in upper right if saving job is successful or if saving job results in an error.
- Job Comment: Success notification appears when adding and editing a Job Comment; Success notification appears when successfully removing a Job Comment.
- Job Status Comment: Success notification appears when adding and editing a Job Status Comment.
- Remove Task: Removed confirmation that task has been removed; Success notification appears when task is successfully removed; Error notification appears when removing task failed.
- Create Invoice: Success notification appears when invoice is created successfully.
- Edit Task: Removed confirmation if user saves task; Added notification when task is saved successfully.
- Hold Event - Removed confirmation when removing hold date; Added success notification when hold date is successfully removed; Removed confirmation when updating task hold date; Added success notification when hold date is successfully added.
- Pay Invoice: Removed save confirmation pop-up; Added success notification when done saving pay invoice; Added error notification to inform users that pay invoice failed to save/update.

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RFP

RFP Manager
- View Service Request Link added to RFP Manager screen. Printable view of SRF opens in new tab.

Related Project

Related Projects Manager
- Columns have been updated and will appear in the following order: Project #, Project Name, Property Address (including City and State), County, Borrower, Account Officer, Service Request, Active, Loan Number

  Note: When there are multiple properties, the project address will show "MULTI".

Reports

All Current Assignments
- Resolved issue where file icon did not consistently appear when a file existed.

All Current Assignments & My Assignments
- Resolved issue where incorrect projects were showing as Reports Received Awaiting Review.

All Current Assignments, All Assigned Tasks, Dashboard
- Status column label updated to Task Status.

Archived Appraisal Indices
- Selecting a property subtype will limit filtering of the major property type by the subtype selection(s). Selecting only a property major type will return all subtypes.

Disposition Activity
- Tasks assigned to VJMs are now included in report results.

Usability

Vendor Performance & Vendor Certifications
- Vendor email address is now a link.

Project Search
- Account Officer link on project search results is a link that can be clicked to display contact information in a pop-up.

Font Size
- Font size was increased from 9 pt to 10 pt on various pages affected by rebranding.

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File Related

Performance

- Improve file search functionality resulting in better performance/response time of files. Pages affected: Project Console--Job/Task Attachments; All Current Jobs/My Jobs--Files; any report showing the file icon; and RIMSCentral file download.

Jobs

Performance

- Performance improved on Account Officer My Jobs page when AO logs into the site.

Quick Search

Performance

- Improved performance of quick search.

Service Request Form

Performance

- Improved performance of SRF View Printable.

Task Related

Performance

- Improved performance on save new task functionality.

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