MBSi CORP.
an Agero company

RC Office

Release Notes

V1.0.52.18 • 04/20/2018

Contents

User Stories

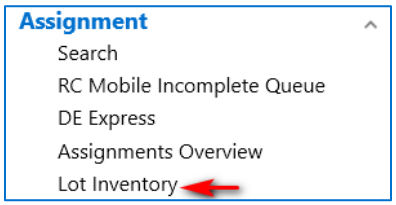
US 262 – RCO – Modify Lot Inventory UI

Introduction

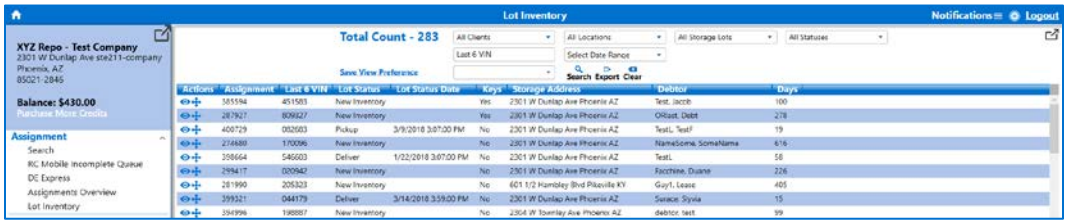
The **Lot Inventory** interface gives you the ability to view and manage post-inventory assets stored in your company's lot(s). Assets must be in the *Recovered* status to be displayed in the interface.

Lot Inventory Interface

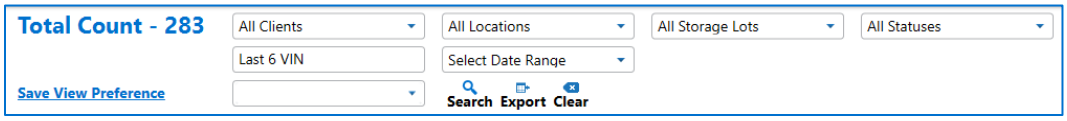
To access the interface, navigate to **Assignment** menu > **Lot Inventory**.



The **Lot Inventory** interface will display.



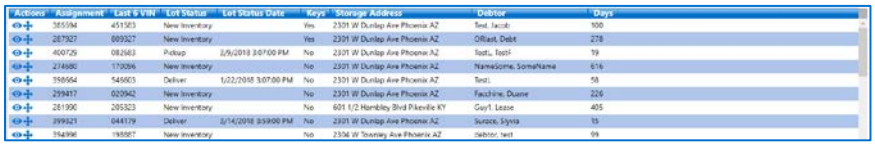
Within you'll find functionality to filter through the assets in your lot. The dropdowns on the top of the interface give you the ability to drill down into individual assets based on criteria such as:



- **Client Location**
- **Storage Lot**
- **Lot Status**
- **Last 6 of VIN**
- **Date range**

Search

Every dropdown selector on the interface is set to return results for all the values available on each dropdown by default. Click Search to display all the lot information available.

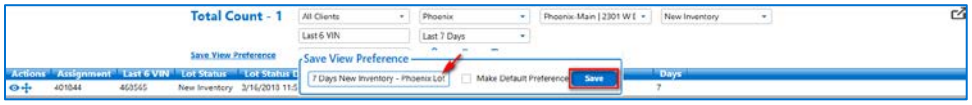


To narrow your search, make individual selections on one or more of the dropdowns. The more specific variables are selected, the more granular the search becomes, and the less results will be displayed on the grid.

Save View Preference

To keep an eye on a distinct set of assets in inventory you can use the **Save View Preference** feature. RC Office can remember a special set of search parameters so that you can quickly access that data.

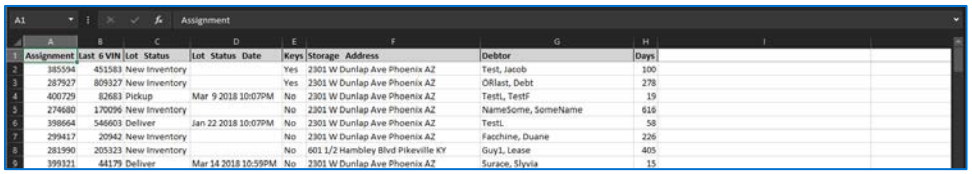
To create one of these searches, select parameters from one or more dropdowns and click **Search**. Review the grid results to ensure that the search returned the data set you are looking for and make any changes to the selections as needed. When the data set is complete, click Save View Preference . The Save View Preference field will display. Enter a name for the search and click **Save**.



To use this set of criteria to search for assets by default, select Make Default Preference .

Export

You can export results that are displayed on the **Lot Inventory Grid** by clicking Export. RC Office will open a Microsoft Excel document export of the grid results.



Lot Inventory Grid Functionality

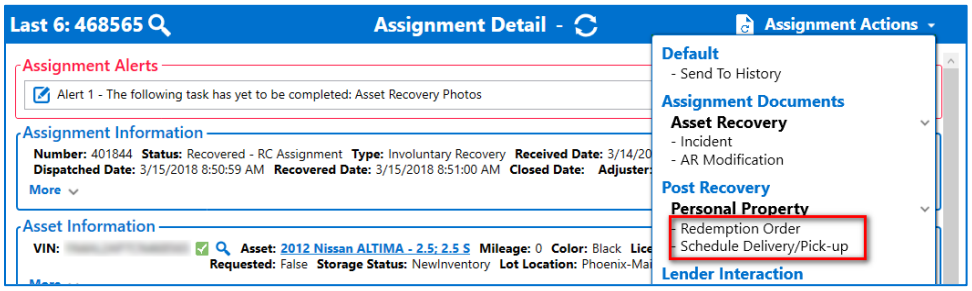
The **Lot Inventory Grid** has functionality to help you process assets as they go through the post-recovery disposition process.

Actions

The Actions column gives you tools to view and move assets in lot inventory.

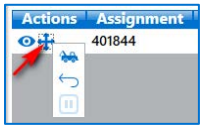
View

Click the **View** button to open the assignment. There you can access post recovery disposition forms on the **Assignment Actions** menu.



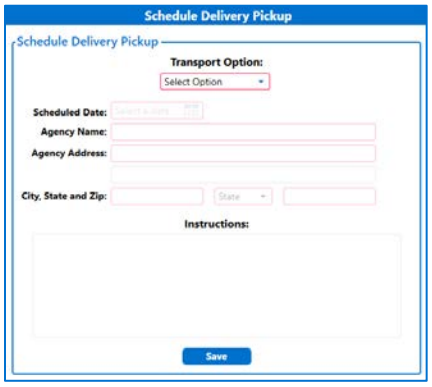
Move

The **Move** button gives you direct access to post recovery disposition forms without opening the assignment. When you click the button, a sub menu will display on the grid with the following options:



Schedule Delivery Pick Up

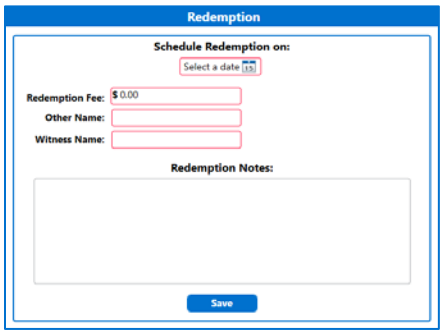
Click the **Schedule Delivery Pick Up** button to display the **Schedule Delivery Pick Up** form.



For more information on this form, please reference the Schedule Delivery Pick Up Form section of this document.

Asset Redemption

Click the **Asset Redemption** button to display the **Redemption** form.



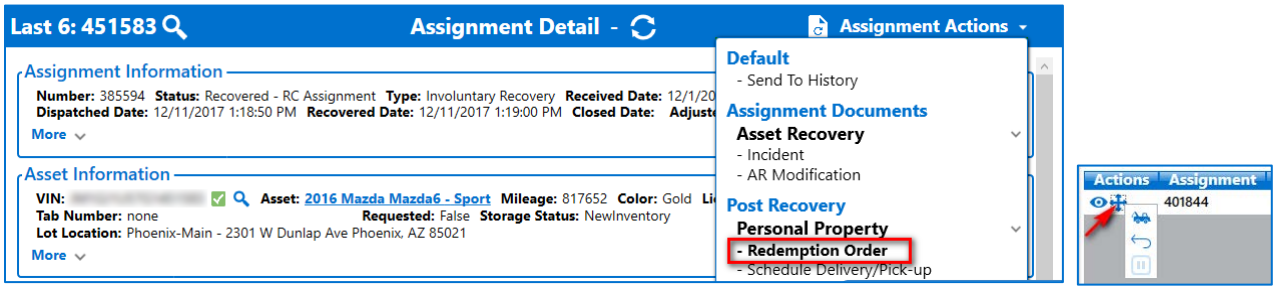
For more information on this form, please reference the Redemption Form section of this document.

Hold

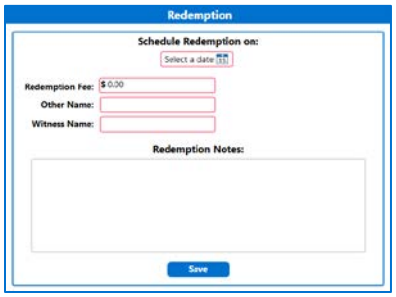
Click the **Hold** button to place a Redemption Order or Delivery/Pick Up form on hold.

Redemption Form

The **Redemption Order** form gives you functionality to record redemption information for an asset. You can access it via the **Assignment Actions** menu of the **Assignment Detail** interface or via the **Lot Inventory** interface.



The **Redemption** dialogue will display.

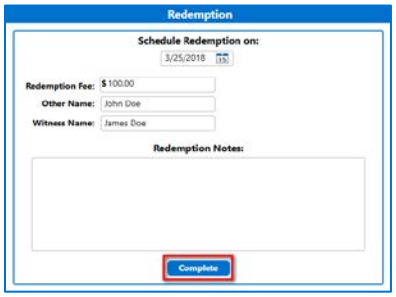


To create a Redemption Order (all fields highlighted in red are required):

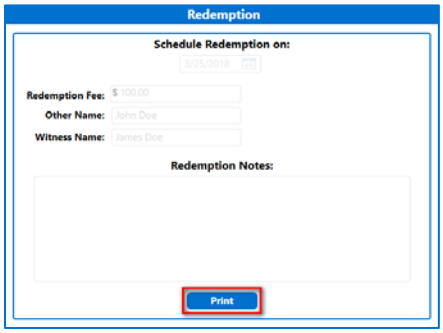
1. Pick a date from the calendar dropdown.
2. Enter the **Redemption Fee**.
3. Enter the **Other Name**.
4. Enter the **Witness Name**.
5. Enter **Redemption Notes** (optional).
6. Click Save.

The redemption has been scheduled.

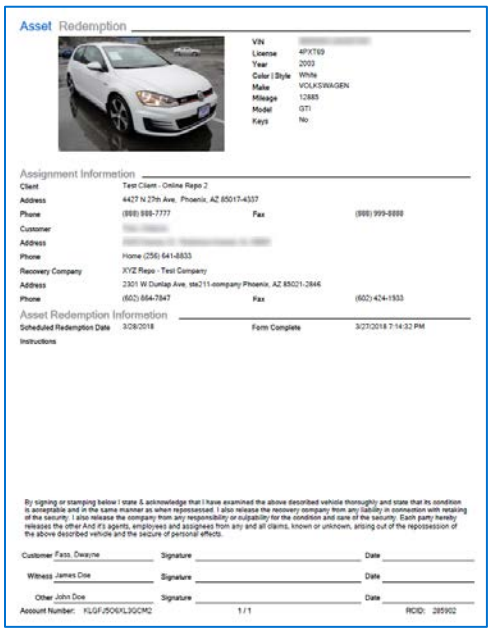
When the asset is going to be redeemed by the customer, reopen the Redemption order and click **Complete**.



To print the **Redemption Order**, open the form and click **Print**.

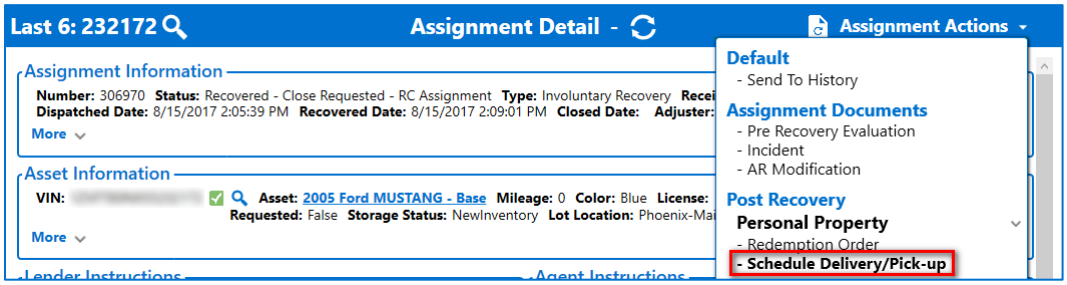


A PDF version of the form will display.

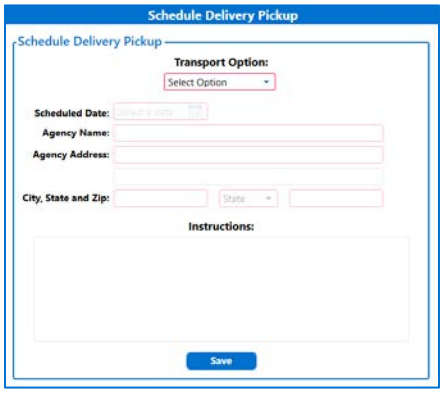


Schedule Delivery/Pick Up Form

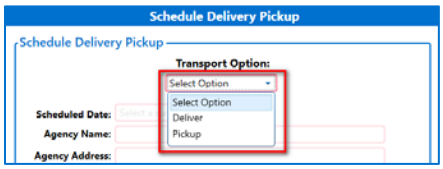
The **Schedule Delivery/Pick Up** form gives you functionality to record Delivery or Pick Up information for an asset. You can access it via the **Assignment Actions** menu of the **Assignment Detail** interface or via the **Lot Inventory** interface.



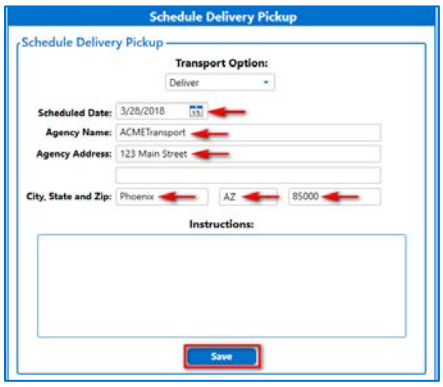
The **Schedule Delivery/Pick Up** dialogue will display.



Within you can create a Delivery or Pick Up form by selecting the proper option from the **Transport Option** dropdown.

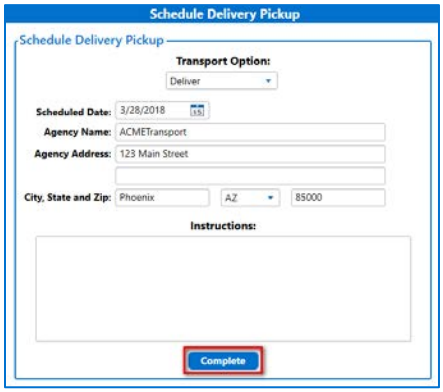


Select a **Scheduled Date**, then enter the **Agency Name**, **Agency Address**, **City**, **State**, and **Zip** information, then click **Save**.

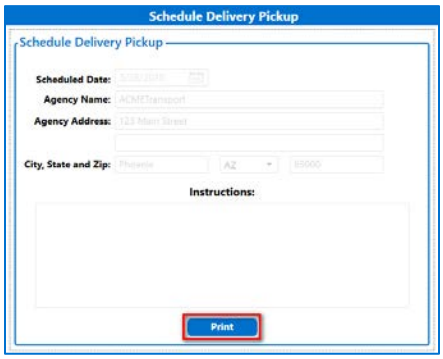


The delivery/pick up has been scheduled.

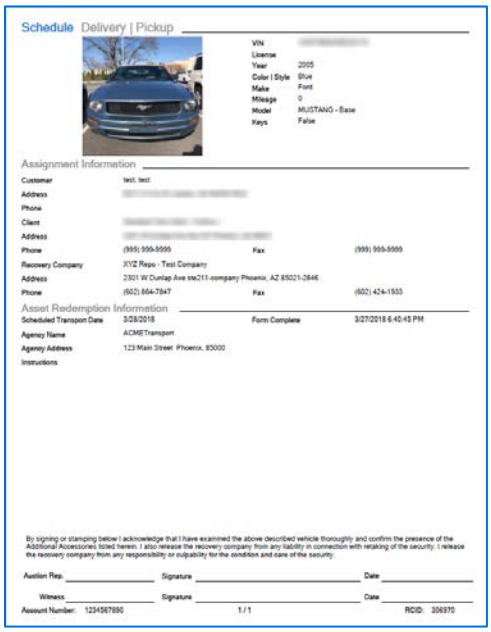
When the asset is going to be delivered or picked up for transport, reopen the form and click **Complete** to finish the delivery/pickup process.



Once the delivery/pick up is completed, you can print the delivery/pick up form by reopening the **Schedule Delivery/Pick Up** dialogue and clicking **Print**.



A PDF version of the form will display.



Resetting a Redemption or Delivery/Pick Up (MBSi Admins Only)

MBSi Admin users can reset a Redemption Order or Delivery Pick Up Form. Resetting the form will remove the *Completed* from the form and reset it. To reset a form:

1. Login in to RCO using your MBSi login.
2. Navigate to **Admin Portal** > **Administration**.
3. Enter the **ReprosID** of the assignment where the form you wish to reset resides and click **Search**.
4. The interface will load basic assignment information, confirm you have the right assignment.
5. Select the form to reset from the **Select Option** dropdown.
    a. There are three options:
        i. *Reset PRE-Eval/OnHook/AR*
        ii. *Reset Redemption*
        iii. *Reset Delivery/Pick Up*
6. Click **Action**.

US 263 – RCO/RCM Device Licenses

Introduction

A change has been made to the billing structure for the RC Mobile App. As of v2.11 RC Mobile will be billed using a per user license model as opposed to a per user model. What this means is that each individual user must have an active license purchased for each device that they use to access RC Mobile. The price of the license will be the same as is currently billed ($4.95 monthly) per user license.

This guide contains manager and end user functionality in relation to RC Mobile user licensing.

As always, if after reading this user Guide you should need any assistance, please contact MBSi Support at Support@mbsicorp.com or by calling (602) 864-7847.

Administrative Functionality

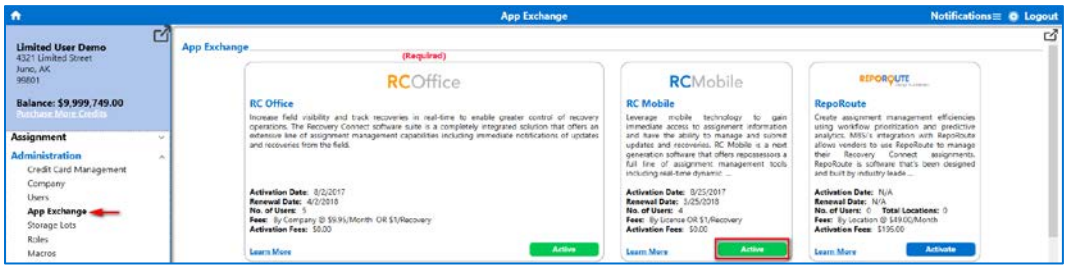
Manager level (and higher) users can purchase new RC Mobile User licenses, unregister existing licenses from user profiles, and delete licenses on RC Office using the **Recovery Connect App Exchange**.

Purchasing User Licenses

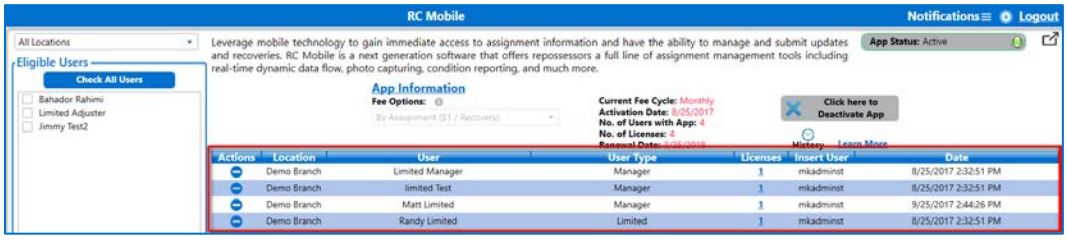
You can purchase User Licenses in two different circumstances:

1. If you have a new user that you wish to use RC Mobile.
2. If you have an existing user that you wish to use RC Mobile on more than one device. In this case each user license will incur its own fee.

RC Mobile user license purchasing functionality can be accessed on the **Recovery Connect App Exchange** (**Administration** Menu > **App Exchange**) by clicking **Active** on the **RC Mobile** section.



The **RC Mobile App Activation Interface** will display. Any active RC Mobile users prior to the billing change will be converted to users with one license.



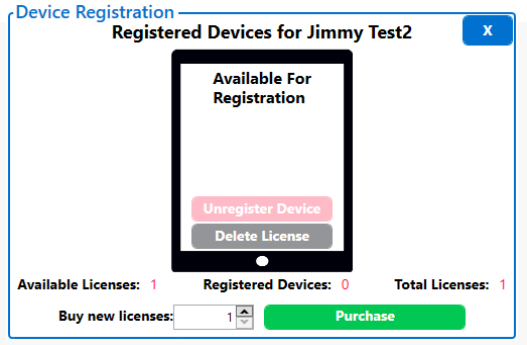
New User

To add a new user, select the user(s) from the **Eligible Users** section and click **Activate Selected Users**. The credit card associated with the company's Recovery Connect account will be billed. Each new user that is added comes with their own license.

The user will be added to the **RC Mobile Activation Grid**. The **License** column on the grid will display a "1", signifying that the user has one user license to associate with a mobile device.

Click the number on the **License** column on the user's line item to review their licensing information.

The **Device Registration** dialogue will display. It contains licensing information such as how many licenses are available, how many registered devices are associated with the user, and the total number of licenses for the user. It also houses license purchasing functionality.

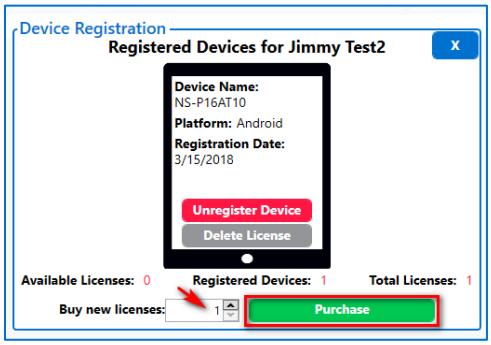


Since this is a new user, no devices have been associated to the purchased license and the dialogue shows that the license is "Available for Registration". The registered user can now use their login credentials to log into RC Mobile and register their device to their user license.

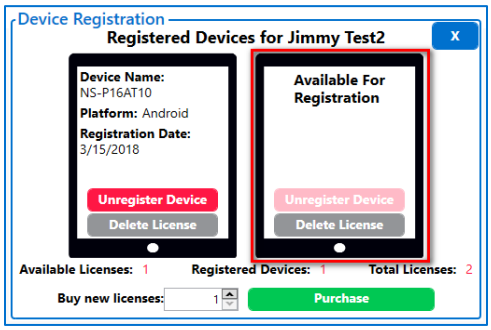
Additional Licenses for Existing Users

If you have an existing user that you desire to use RC Mobile on more than one device, go to the user's line item on the **RC Mobile App Activation Grid** and click the number link on the **Licenses** column.

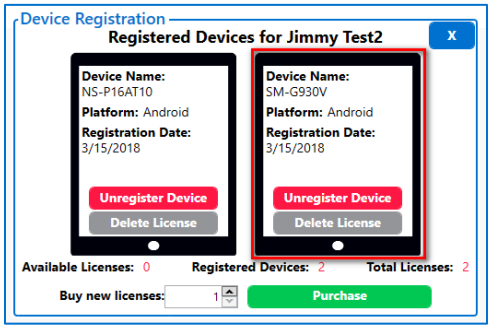
The **Device Registration** dialogue will display. Select the number of licenses to purchase from the **Buy New Licenses** field and click **Purchase**.



The credit card on file for the company will be billed, and upon completion, the **Device Registration** interface will display an additional user license slot in the “Available for Registration” status.

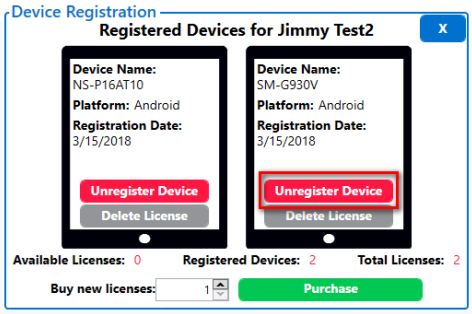


Notify the user that they can register the additional device(s). When the user completes the registration process on the new device, the **Device Registration** will display the pertinent information about the new device.

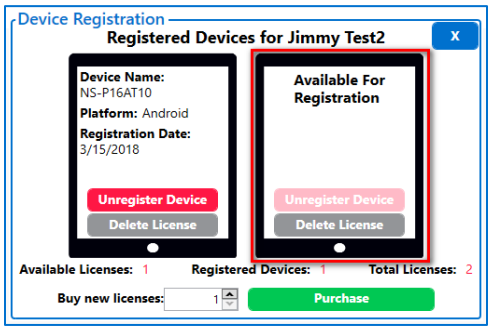


Unregistering a Device via RC Office

In situations where a device is lost, stolen, or damaged, Administrative users can unregister the device on the **Device Registration** dialogue by clicking **Unregister Device**.



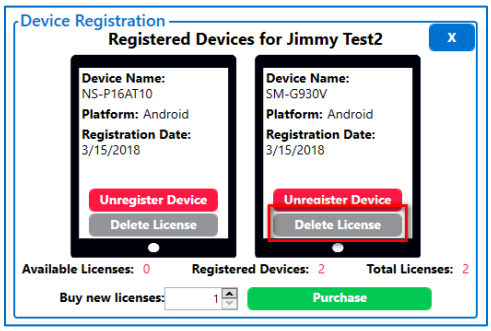
The device will be unregistered, and the user license seat will display the “Available for Registration” status.



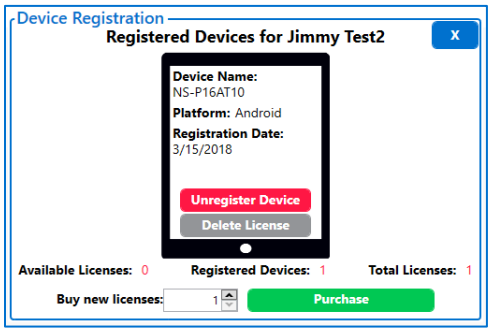
Once the user is ready to associate another device, the open user license seat will be assigned to the new device.

Deleting a User License

If a user license is no longer required for a user, you can delete it on the **Device Registration** dialogue by clicking **Delete License**.



The user license seat will be removed from the user’s profile.

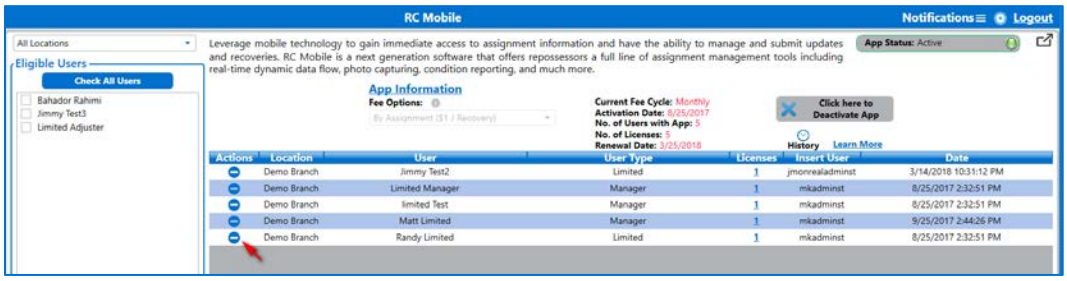


Once deleted, it is gone permanently. The only way to reverse this action is to purchase another seat for the user.

Removing a User from the RC Mobile App Activation Grid

When you use the **Remove** functionality within the **RC Mobile App Activation Grid** to remove a user, RC Office will remove the user and their corresponding user license(s). User licenses cannot be

transferred between users. You must purchase new licenses to regain access to a comparable number of licenses as were deleted with the removal of the user.



End User Functionality

RC Mobile has been updated to enforce license-based user access.

How License-based Access is Implemented within RC Mobile

User license-based access is enforced upon login to RC Mobile. The login procedure is designed to handle situations where users attempt to login without a license, a licensed user attempts login on an unregistered device, and when a licensed user wishes to use a different device than the one on which their user license is registered.

Users Without a License

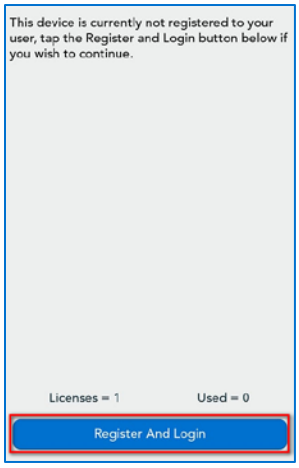
When a user who doesn't have a license purchased for them attempts to log into RC Mobile, the following dialogue will display:

Tap **OK** and contact your Recovery Connect administrator to request a user license be purchased on your behalf.

Registering a Device

Note: if you desire to have multiple users utilizing the same device to access RC Mobile they can do so using the license associated with their profile. This also applies when users from different companies use the same device.

If your Recovery Connect administrator has purchased a license for your but you have not associated a device with that license, log into RC Mobile with your user credentials. The screen below will display after you log in. Tap **Register and Login** to register the device to your user license.



A confirmation dialogue notifying you that the device was registered successfully will display. Tap **OK**.

You will be required to enter your login information again. You may be required to accept a Terms of Service Agreement (TOS), and/or End User License Agreement (EULA), etc. upon login. When the process is complete the **Main Menu** will display.

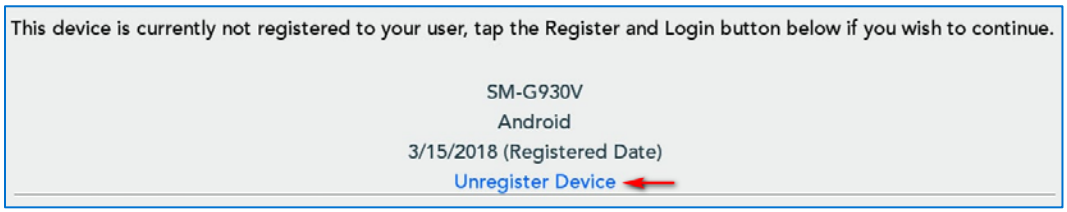
The license that comes with your user profile can be utilized to access RC Mobile on more than one device, but you will have to unregister the license from the current device and register it to the new device each time you switch devices (you can find instructions on unregistering a device below).

To avoid having to register/unregister the device each time you switch devices, you can purchase a license for the additional device. Contact the Recovery Connect Administrator for your company to have them purchase the additional license(s).

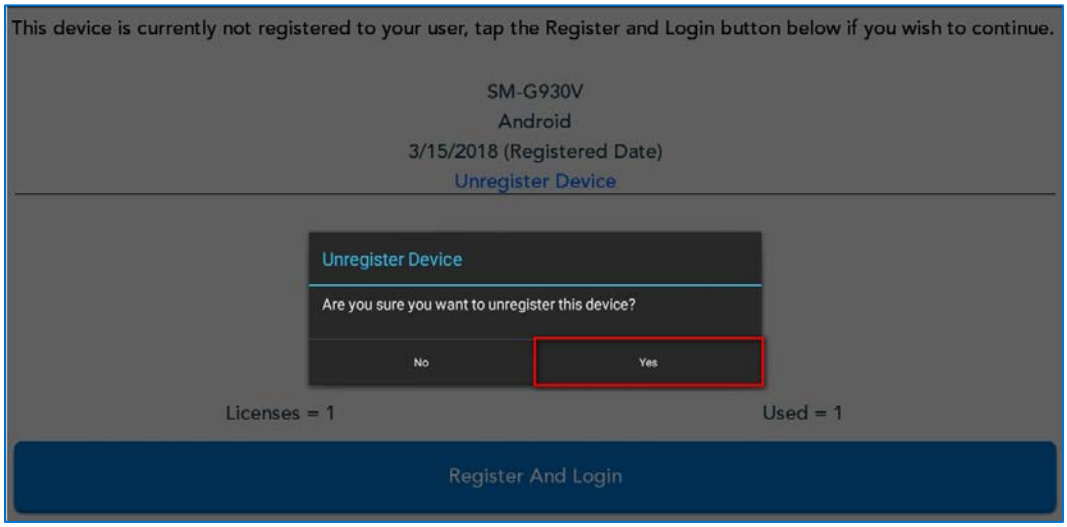
Unregistering a Device via RC Mobile

If you have a purchased user license that is already associated to a device, but you wish to use that same license on a different device, you can unregister the associated device and associate your license to the new device. Simply log into the new device with your RC Mobile login credentials. A screen will display, informing you that this device is not currently registered to your user, and provide information about the device registered to your user profile.

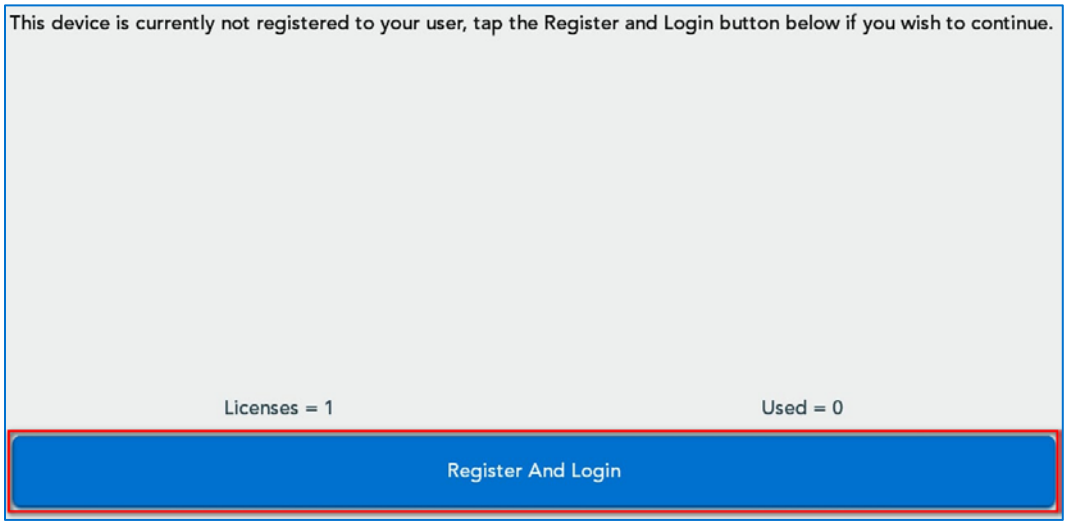
Tap **Unregister Device**.



A confirmation dialogue will display. Tap **Yes** to unregister the previous device.



The screen will no longer display the previous device. Tap **Register and Login** to register the device to your user license.



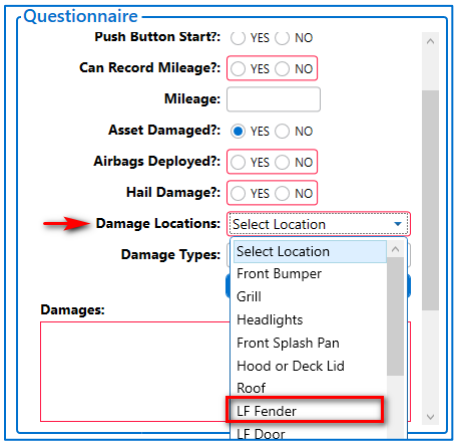
A confirmation dialogue notifying you that the device was registered successfully will display. Tap **OK**.

You will be required to enter your login information again. You may be required to accept a Terms of Service Agreement (TOS), and/or End User License Agreement (EULA), etc. upon login. When the process is complete the **Main Menu** will display.

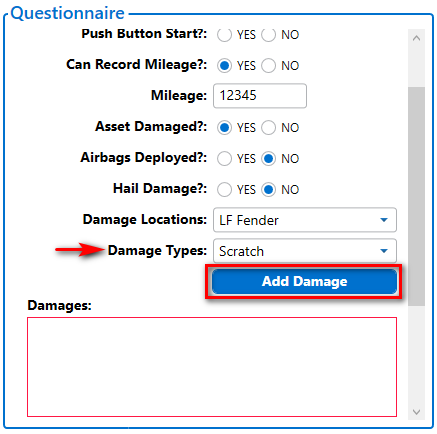
US 264 – RCO – Pre-Asset Recovery Picture Requirement

The following changes have been made to the Pre-Recovery Evaluation task:

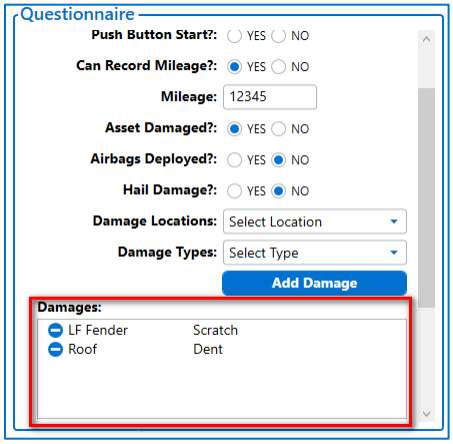
1. When *Yes* is selected for the **Asset Damaged** question:
   - A **Damage Locations** dropdown has been added that allows you to report the areas on the asset where the damage was found. Select the location of the damage.



   - Select the **Damage Type**.
   - Click **Add Damage**



- The selected damage location and type will be added to the **Damages** grid. Repeat the steps above to add additional damage locations and types.



When the **Pre-Asset Recovery Form** is submitted the interface will refresh and provide a list of pictures that will be required to successfully submit the form. Among those pictures, images of the damage location and type(s) you entered on the form will be required.

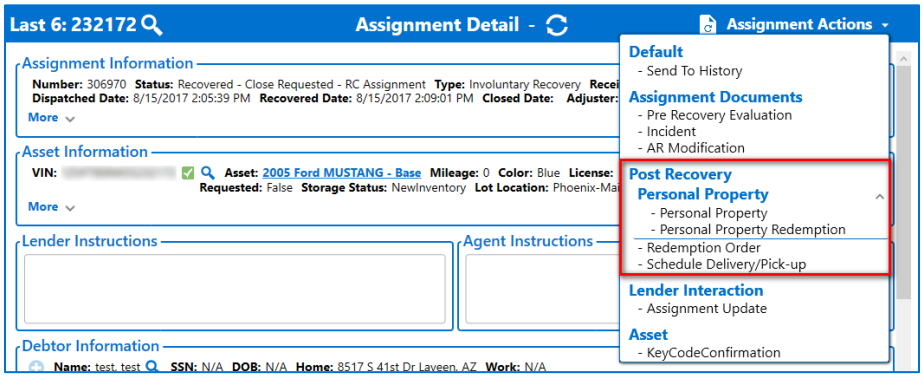
2. When submitting the Pre-Asset Recovery form after the initial completion of the form, the following pictures will be required:
   - *Front Driver Side Corner*
   - *Front Center*
   - *Front Passenger Side Corner*
   - *Side Passenger Side*
   - *Rear Passenger Side Corner*
   - *Rear Center*
   - *License Plate*
   - *Rear Driver Side Corner*
   - *Side Driver Side*

- *VIN*
- *Damage Pictures (see #1 above)*

3. The photos taken on a Pre-Asset Recovery Form must be retaken when at the time of **Asset Recovery Photos** form completion.

US 276 – RCO – Add Post Recovery Assignment Action Section

A new section called, **Post Recovery** has been added to the **Assignment Actions** menu within the **Assignment Detail** interface. The forms that will be displayed on the submenu will be controlled by role setting. The forms are as follows:



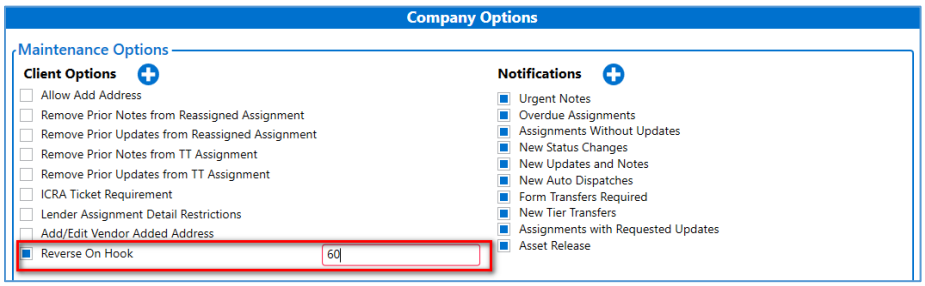
- **Personal Property**
  - *Personal Property*
  - *Personal Property Redemption*
- **Redemption Order**
- **Schedule Delivery/Pick-Up**

US 277 – RC – Pre-Recovery Evaluation – Issue When Forwarded to Multiple Vendors

When an assignment has been forwarded to multiple vendors and one of the vendors completes the Pre-Recovery Evaluation form, the assignments placed with the other vendors remain active; an On-Hook or Asset Recovery action can be completed on them. Once an assignment goes into the *Recovered* status with one of vendors, all the other forwarded assignments are closed to prevent unintended recoveries.

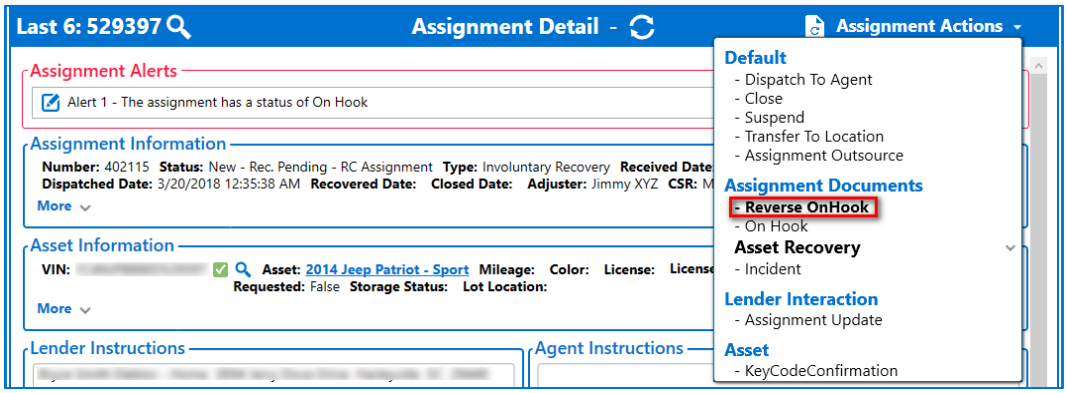
US 278 – RCO – Allow Vendor to Reverse On Hook within Allowed Hours

On the **Company Options** interface for an online client, within the **Client Options** field of the **Maintenance Options** section, a **Reverse On Hook** checkbox has been added.



When selected, you will be required to add a numeric value of hours. Save the values.

This functionality will enable your vendor users to use RC Office to remove an *On Hook* action on your assignments for the length of time you designated. When they open the assignments the **Reverse OnHook** item will be displayed in the **Assignment Actions** menu.



To remove the functionality, deselect the **Reverse On Hook** checkbox.

US 279 – RC – Custom Forms Items Priority

On post recovery forms that are eligible for Custom Form statements, when a Lender has marked a field as optional on their custom form setup, vendors can use their custom form setup to make that field required.

US 280 – RCO – AR Reset Modification

MBSi Admin users can reset a **Pre-Recovery Evaluation**, **Asset Recovery,** or **On-Hook** action. Resetting the form will take remove the condition report record and attachment relationship from the form and reset it. To reset a form:

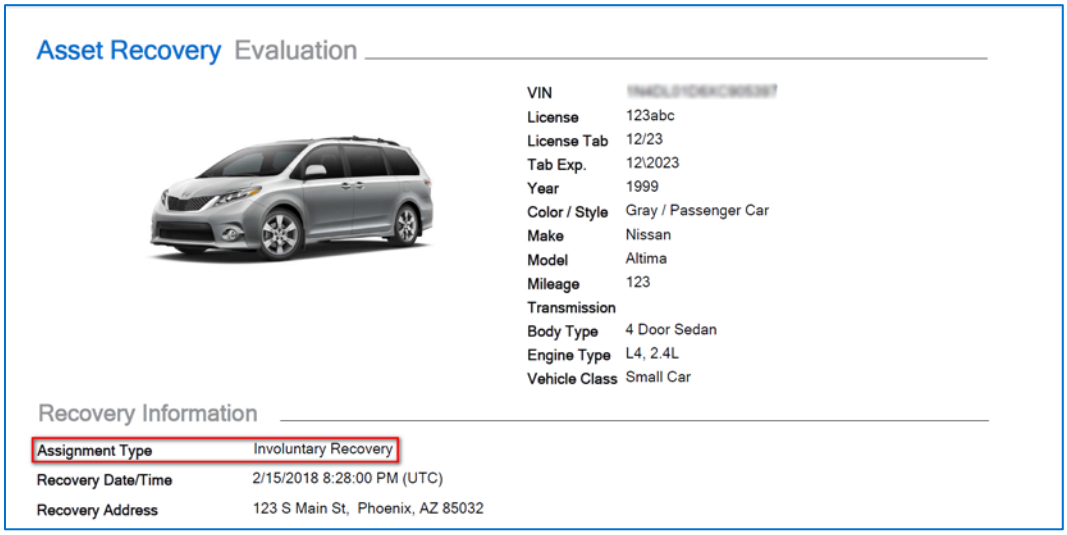
1. Login in to RCO using your MBSi login.
2. Navigate to **Admin Portal** > **Administration**.
3. Enter the **ReprosID** of the assignment where the form you wish to reset resides and click **Search**.
4. The interface will load basic assignment information, confirm you have the right assignment.
5. Select *Reset Pre-Eval/OnHook/AR* from the **Select Option** dropdown.
6. Click **Action**.

US 281 – RC Add Training Required to Rules DLL

The “Training Required” special rule has been added to the RC Office “Rules” DLL.

US 284 – RC – Add Recovery Type to AR PDF

The **Assignment Type** has been added to the **Recovery Information** section of the printable **Asset Recovery Evaluation**.



US 285 – RC – Tooltip Validation Table

A validation table was created on the database to store action menu tooltip text. Tooltips throughout the application will reference the table to display the appropriate information. This change was developed to eliminate the need for a release whenever tool tips needed to be updated as they were previously hard coded.

US 286 – WS – Branch Out Certification Rule (User)

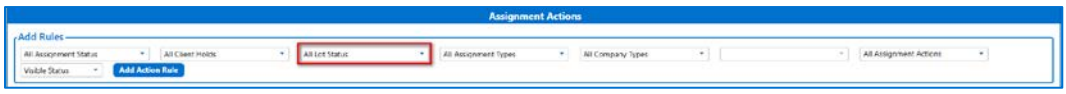
The Training/Certification Requirement has been from the Recovery Connect Web Service to the “Rules” DLL file of the application. Because of this change, you will not be able to access assignments if you have any pending training requirements. When you attempt to open an assignment under this scenario, a dialogue box stating “Cannot open the assignment. You have not successfully completed the Lender’s Assignment Training Requirements. Please contact MBSi Support for more information” will display.

US 287 – Move User Access Restrictions to Rules DLL

The code controlling User Access Restrictions has been moved to the “Rule” DLL file.

US 289 – RCO – Add Lot Status to Assignment Action Setup

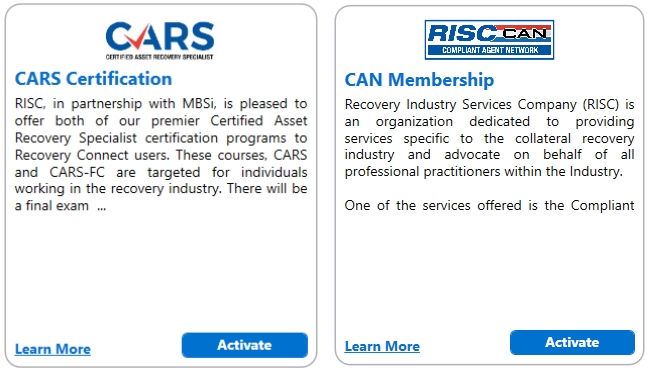
On the **MBSi Admin Portal**, within the **Assignment Actions** interface (**Admin Portal** > **Assignment Actions**), a **Lot Status** dropdown has been added.



This dropdown works in the same way as the **Assignment Status** dropdown and requires a value to be selected to add an action rule. It allows you to select “All Lot Status” or an individual lot status for which the rule will apply.

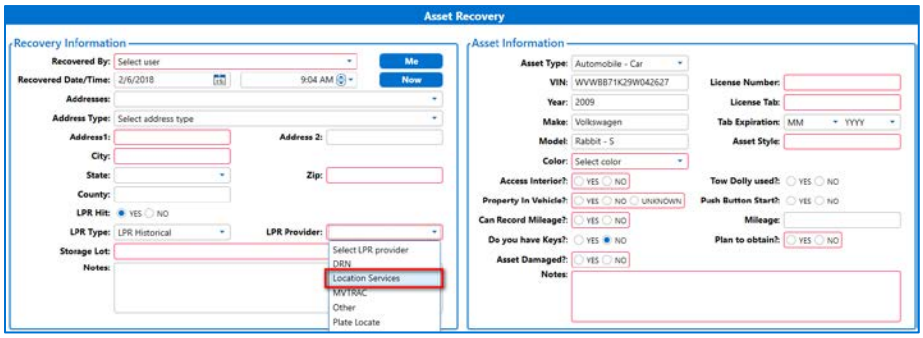
US 290 – RCO – Update CARS & CAN Logos

On the **Recovery Connect App Exchange** the logos for CARS Certification and CAN Membership have been updated with their latest versions as provided by RISC.



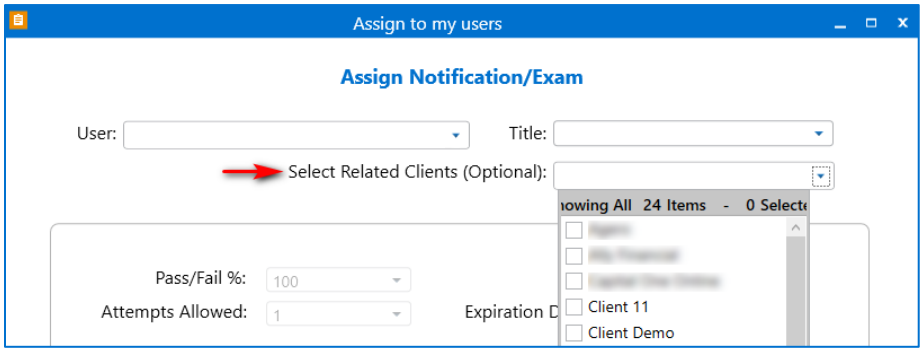
US 291 – RC – LPR Provider Rename

The name of the LPR Provider on the LPR Provider validation table has been changed from “PRA” to “Location Services”.



US 1276 – TC – Specify Client on Send

On the **Assign to My Users** dialogue, the **Select Related Clients** dropdown allows you to select a specific client or clients for which the Notification/Exam program that you are assigning will apply.



US 1278 – TC – MBSi Notification

Training Comply functionality has been modified so that it will work for MBSi user logins to be able to send Notifications/Exams to externally to companies using Training Comply. MBSi Internal notifications are not currently available.

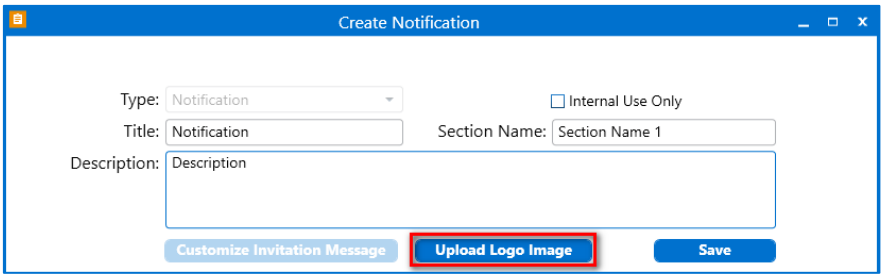
US 1279 – TC – Notifications/Exams Open Tracking

Training Comply will now track the following information when a user opens a Notification or Exam:

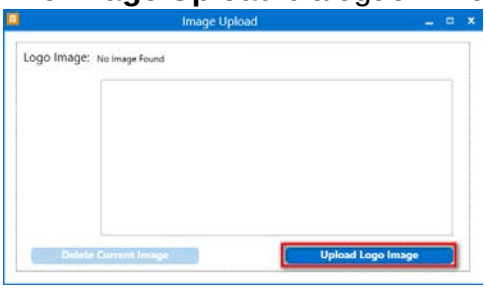
1. User ID
2. Date and Time
3. Notification or Exam name.

US 1281 – TC – Logo Upload

On the **Create Exam** and **Create Notification** interfaces, the **Upload Logo Image** button gives Lenders and Forwarders/Outsourcers the ability to upload an image of their company's logo to include with the Notification/Exam.

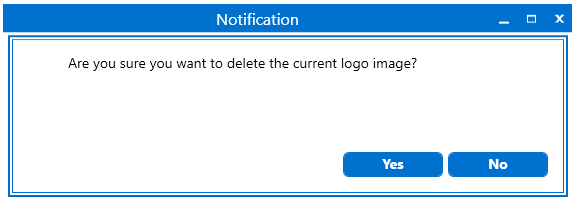


The **Image Upload** dialogue will display. Click **Upload Logo Image**.



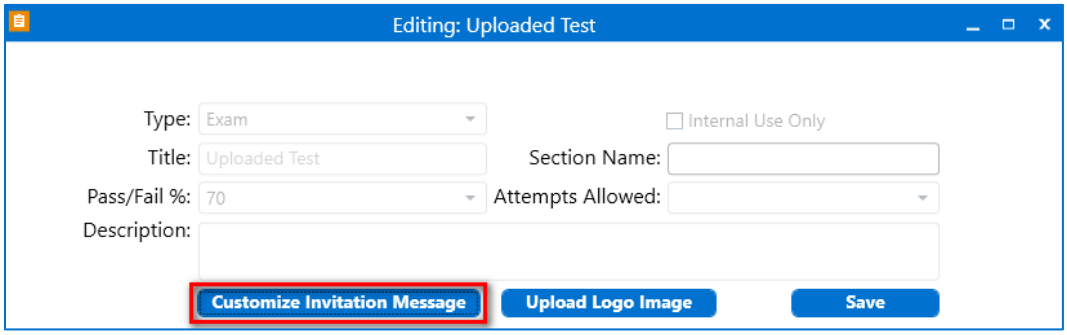
Select the logo from the **Select Logo Image File** dialogue and click **Open**. The image will now display on the **Image Upload** dialogue.

The **Delete Current Logo** image can be used to remove the current version of the logo. When clicked, a confirmation dialogue will display. Click **Yes**.

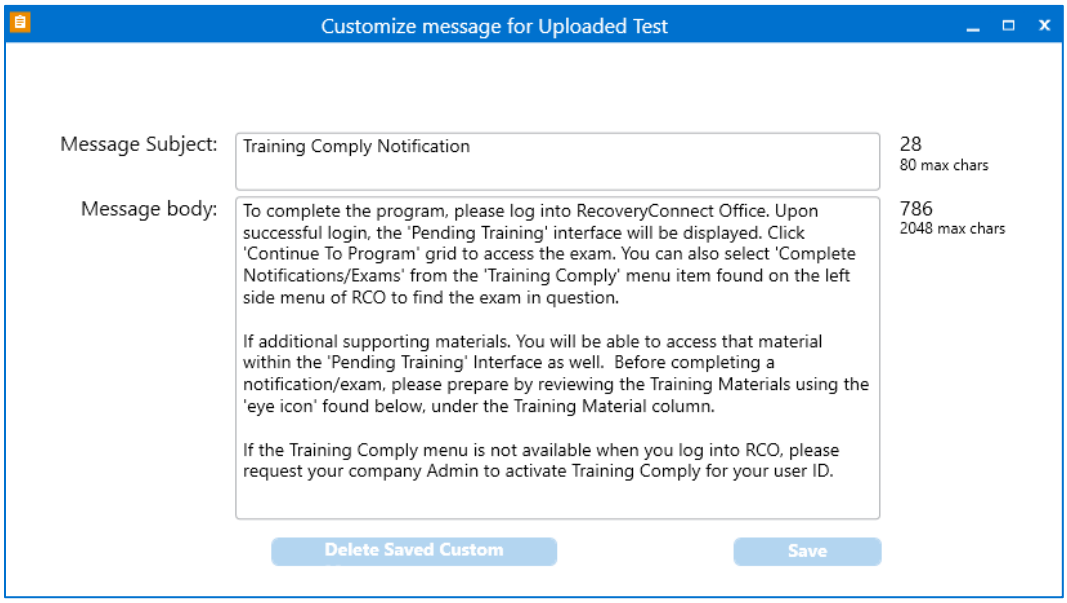


US 1282 – TC – Custom Email Notification

On the **Editing Uploaded Test** interface click the **Customize Invitation Message** button to create personalize emailed text for the Notification/Exam email.



The **Customize message for uploaded text** dialogue will display. Enter the **Message Subject** (80 character max) and the **Message Body** (2048 character max), and click **Save**.



US 1283 – TC – Track Attachment Open

Training Comply will now track the following information when a user opens an attachment on a Notification or Exam program:

1. User ID
2. Date and Time
3. Notification or Exam name.
4. Name of the Attachment.

US 1626 – RCO – Master Lockout Assignment Access Restriction

When a user attempts to access an assignment, RCO will check the “Rules” DLL file for any Assignment access restrictions recorded on the Master Lockout Table for the lender on the assignment. If the user is restricted from accessing the assignment, a dialogue will display, explaining the reason for the restricted access. This user story covers the modification made to the “Rules” DLL file to accommodate this change in RCO.

Defects

Defect 1329 – RCO Add Credits UI – History Not Clearing on Logout

Addressed an issue that manifested during testing which was causing information displayed on the **Add Credits History** grid from one user to be displayed to a different user when another user logged in using the same computer.

Defect 1330 – RC – Vendor Vetting Lock Out MBSi Admin

Fixed the logic governing the user restrictions during the vendor vetting process to ensure that MBSi Users of the type “MBSi Admin” are not locked out because of vendor vetting restrictions.

Defect 1332 – RCO – Storage Lots with Lot Inspections Being Edited by Regular Users

Made a change to the code governing the display of vendor lot locations to restrict the ability to save any changes to lots that have an inspection associated with them.

Defect 1333 – RCO – Purchase More Credits – Purchase History Crash

Addressed an issue within the **Purchase More Credits History** feature that was causing the application to cease responding when start date and/or end date parameters were deleted prior to searching or exporting searches.

Defect 1334 – RCO – User Options for Assignment Detail Options are not Saved

Addressed a logic issue that was causing users to be unable to save **Assignment Detail Options** under the **User** settings feature when users were editing other users.

Defect 1335 – RC – Training Comply – Expired Exam/Notification

Made changes to the **Complete Notifications/Exams** to ensure that expired tests remain on the interface for 45 days after the expiration, previously when the Notification/Exam expired, it would be removed from the interface.

Defect 1336 – RCO – CARS Certification Number Not Saving in User’s Profile

Fixed an issue that was occurring during the save procedure of the **User** interface that was causing a user’s newly entered CARS Certification number to not be stored upon save.

Defect 1338 – RC – L+L Update Parent Recovery Record as Well as child with Recovery Address Coordinates

When completing the Asset Recovery Form on outsourced assignments, additional code was added to ensure that latitude and longitude coordinates are recorded on the original (parent) assignment and not just the outsourced (child) assignment.

Defect 1808 – Rules DLL errors while Outsourcing Due to Null Email

Addressed an issue that was causing a “System.ArgumentNullException” error when outsourcing an assignment when the user creating the outsource assignment did not have a recorded email address on their profile.

Defect 1872 – TC – Modify Manage Notification/Exam Company Filter

The **Company** dropdown on the **External View** tab of the **Manage Notifications/Exams** interface has been modified to exclude any companies that are disabled on the outsource company relationships table.

Defect 2021 – RCO Search – Last 10 Searches shows more than last 10

Changed code on the **Search** interface to address an issue that was causing more than the last 10 searches to display on the **Last 10 Searches** field.

Defect 2022 – RCO Search – Error on Save Search Criteria

Fixed an “Object Not Set to an Instance of an Object” error on the **Search** interface when attempting to save search criteria.

Defect 2045 – TC – User unable to view existing programs

Addressed an issue that was causing the system to cease responding and display a blank dialogue when a user attempted to click the **View** button on the standalone version of TC under the **Create Notifications/Exams** interface.

Defect 2047 – TC – Create program edit crashing RCO

Fixed an issue that was causing RC Office to cease responding when users would click the **Edit** button on the **Create Notifications/Exams** interface.

Defect 2048 – TC – Assign Programs UI error loading grid

Fixed an “Object not set to an instance of an object” error that users were encountering when attempting to access the Assign **Notifications/Exams** interface.

Defect 2050 – TC – Error opening Program Library UI

Addressed a “System.NullReferenceException” error that was being generated when attempting to select the **Programs** dropdown on the **Notifications/Exams Library**.

Defect 2051 – TC – Manage Programs UI error

Addressed an “Object Not Set to an Instance of an object” error that was being generated when users attempted to open the **Manage Notifications/Exams** interface.

Defect 2052 – TC – Complete Programs Error

Fixed an issue that was causing an “Error occurred while loading grid” dialogue to display when attempting to open the **Complete Notifications/Exams** interface.

Defect 2053 – TC Home button

Removed the **Home** button from the Training Comply interface that was leading to a dead link.

Defect 2066 – TC – Test available pop-up page not showing

Addressed an issue that was causing the **Complete Notifications/Exams** interface to fail to display when the user had a pending Notification/Exam assigned to them.

Defect 2071 – TC unable to open exams and notifications

Addressed an “Application Error” that was occurring on the **Complete Notifications/Exams** interface when users were trying to click on the **Actions** button to take an exam.

Defect 2072 – Error trying to complete program through create program view action

Fixed a “Value Cannot Be Null” error that was being generated when users where attempting to complete a program on the Create Notifications/Exams interface.

Defect 2166 – TC – Manage Program – External view error

Fixed a “System.InvalidCastException” error that was being generated on the **Manage Notifications/Exams** when the **External View** tab was selected and you were logged in as a Client, Forwarder or Outsourcer.

Defect 2321 – TC – Multiple TC windows causing errors

Addressed an issue that occurred when multiple instances of a TC session were opened concurrently. Only the currently focused instance was connected, the other sessions were logged out.

Defect 2335 – RCO/RCM Error uploading pictures

Fixed the procedure for completing AR Photos by addressing an issue that caused RC Office and RC Mobile to generate “Nullable object must have a value” errors because an Asset Type was not selected when the assignment was created.

Defect 2340 – TC – Multiple Notification Assigns Allowed

Made changes to the logic that governs the Notification/Exam interface to fix logic that was allowing user to assign multiple instances of the same Notification/Exam to be assigned to the same user.

Defect 2352 – TC – Assign Externally wrong user displayed

Addressed an issue that was causing incorrect **Information** dialogue information to display when attempting to assign a training program to a user that already has that program assigned to them.

Defect 2686 – RCO – Training Comply General Issues

This defect was created to fix the following issues:

1. When logged in as a forwarder/outsourcer the **External View** Search button was causing RC Office to cease responding when clicked.

2. A “System.NullREferenceException” error was being generated when the **Assign Notificaitons/Exams** interface and the user logged out or closed the interface.
3. A “System.IndexOutOfRangeException” error was being generated when users clicked **Cancel** on the **Upload Image** dialogue within the **Create Notification/Exam** interface.
4. When clicking the **Remove Current Image** button and closing the **Upload Image** dialogue of the **Create Notification/Exam** interface was causing the photo to be removed when it wasn’t supposed to.
5. On the **Manage Notifications/Exams** interface, the **Internal View** tab was visible to vendors, when it should only be available to forwarders/outsourcers.

Defect 2748 – Add Updates Defect

Made changes to the logic behind the **Add Updates** interface to fix an issue with Address Updates incorrectly reporting the asset as recoverable when the user actually selected “No” as the answer to the “Is unit Recoverable” question.

Defect 2750 – Police City/State Issue

On Client Web Service v1, the Get Recoveries method has been modified to ensure that when Police city and state information is being retrieved, it will now use the column “szRecoveryNotificationCity” to retrieve this information.