

FIMS 14.60 (with April update) Release Notes

This document contains brief summaries of enhancements and issues resolved in the FIMS version 14.60 update dated **April 12th, 2018**. This release includes the previous 14.60 release content, as well as two additional fixes.

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Upgrade Overview

Host*Net clients are scheduled to be upgraded to the April 12th version of 14.60 on April 14th, 2018 during scheduled maintenance downtime. Please be advised the servers will be down from 5am to 6pm EST.

On Premise clients on version 12.50 or greater can self-update to 14.60 by downloading the installation package from [Blackbaud Downloads](https://www.blackbaud.com/support/downloads/downloads.aspx) (<https://www.blackbaud.com/support/downloads/downloads.aspx>), extracting the files, and running the **fims1460.exe** file.

The FIMS 14.60 version dated April 12, 2018 *includes* two fixes in the **FIMS 14.60 patch**. If you upgrade with the April 12, 2018 package, you do not need to also install the patch.

If you upgraded earlier with the 14.60 March package, you can optionally install the patch if you are impacted by the two issues resolved by the patch.

On Premise clients on a version earlier than 12.50 must contact FIMS Support.

FIMS Support

Need Help?

If you have questions or need assistance, please contact Support.

Online: Visit Case Central at <https://www.blackbaud.com/casecentral/casesearch.aspx>. Click the **Case** tab at the top and click **Create New Case**.

Phone: (800) 256-7772

Support Hours: M-F, 8:30 am – 8:00 pm ET

Enhancements

Support for Progress OpenEdge 11.6 and later

FIMS 14.60 added support for Progress OpenEdge version 11.6 or later. While Progress OpenEdge 10.2b continues to be supported, we recommend upgrading to version 11.6 or later.

Support for Crystal Reports 13 with Progress OpenEdge 11.6+

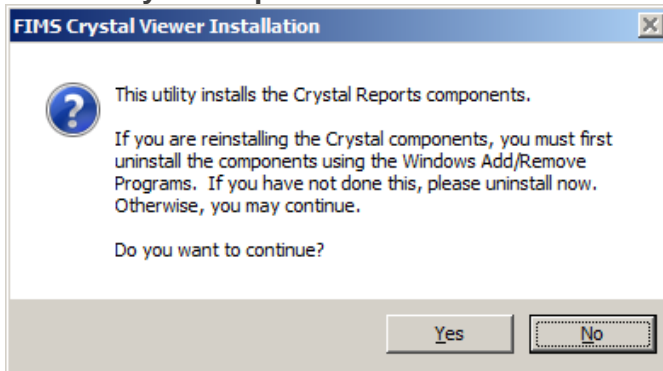
FIMS 14.60 supports Crystal Reports 13 runtime in a FIMS Crystal Reports Viewer for clients using Progress OpenEdge version 11.6 or later.

Crystal Reports written in Crystal 10 and 11.5 will still run with Crystal Reports 13 runtime.

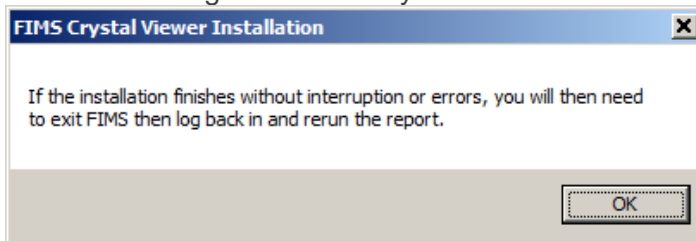
When on FIMS 14.60 and Progress OpenEdge 11.6, you'll be prompted to upgrade Crystal Reports when you launch from the FIMS Custom menus.

To install Crystal Reports 13 runtime, complete the following steps:

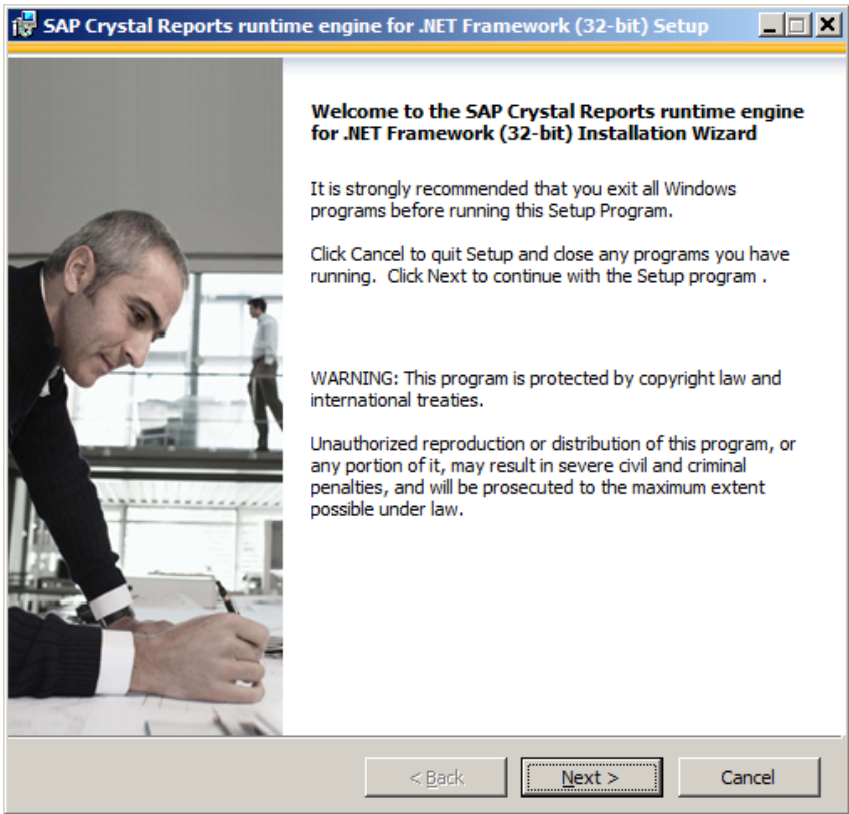
1. Use the Windows **Add/Remove** program to uninstall existing Crystal Reports components.
2. Launch the installer by doing one of the following options:
 - On each workstation, double-click **setup.exe** or **CRRuntime_32bit_13_0_20.msi** in the **...npo\found\install\Crystal\13** folder.--OR--
 - Launch **Crystal Reports** from the FIMS Custom menu, and when prompted, click **Yes**.



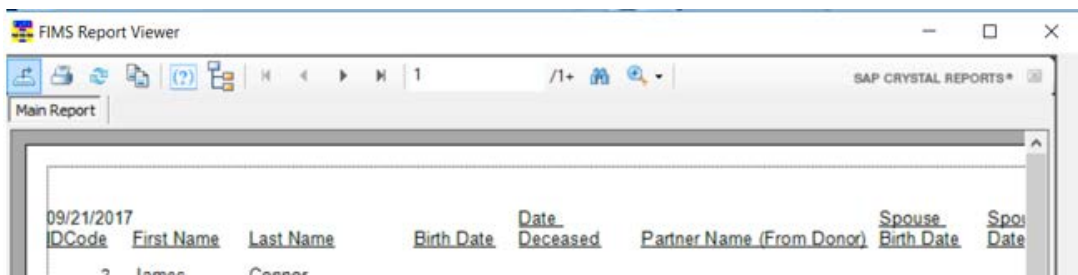
3. Click **OK** to acknowledge that after Crystal 13 runtime installs, you must restart FIMS.



4. Click **Next** to complete the setup.



5. Restart FIMS before accessing the Crystal Reports 13 FIMS Viewer.



Note: If your custom menu is set up to run Accounts Payables for older Crystal Reports, you must update those to use **odbc\crystal\RunCrystal.w**.

For example:

- **odbc\crystal\RunCrystal.w odbc\crystal\Crystal_BirthDeceased_Report.rpt**
- **odbc\crystal\RunCrystal.w D:\NPO\Crystal\odbc\crystal\DC_Quarterly_Fund_Statement.rpt**

Added Clarity to Crystal Reports in System Options

In **System Options > Fund Section**, clarity was added to Crystal reports.

- Options beginning with **Fund_Statements_Crystal_** (plural statements) are intended for use with the utility that saves Crystal Fund Statements to fund folders. This utility is not found on the menus, but can be run from Custom Menus or Run Procedure (**odbc\crystal\w-statex.w**).
- Options beginning with **Fund_Statement_Crystal_** (not plural) are intended for use with the **Fund Statement** shortcut button in the **Fund Module**.

Note: The **Fund Statement** shortcut feature is unavailable in Progress 11.

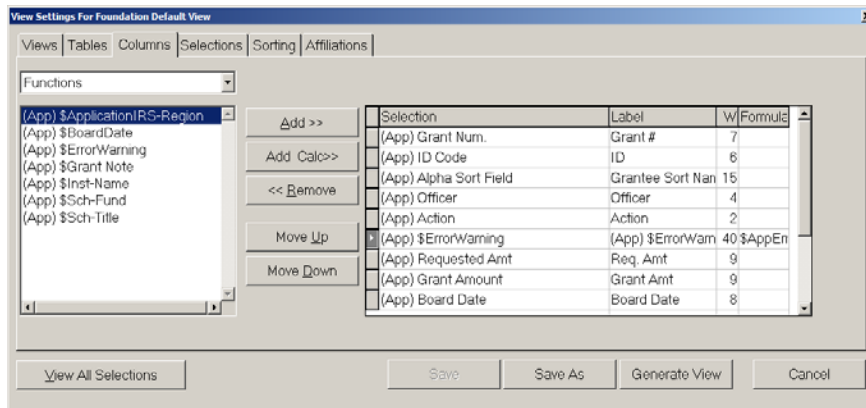
Grants, Scholarships, and Accounts Payable

View errors and warnings

In the Data Grid for **Unposted Applications** in Grants and Scholarships, and for **Open Items** in Accounts Payable, we've added an error column so you can review issues that require action. With this new feature, you no longer need to run edit reports to view data issues.

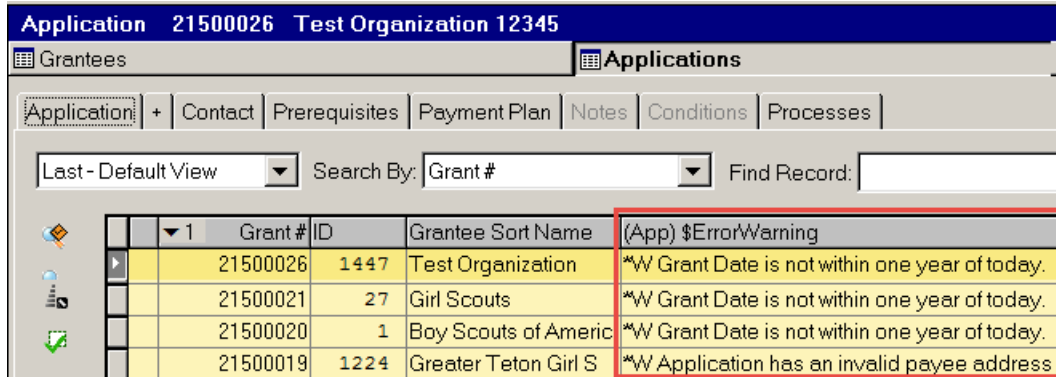
To see errors and warnings in the Data Grid:

- Go to:
 - Grants > Applications**
 - Scholarships > Applications**-- OR --
 - Accounts Payable > Open Items.**
- To the left of the Data Grid, click the **View Settings** icon.
- Choose to edit or copy an existing view, or add a view in which to add the column.
- Click the **Columns** tab.
- Choose **Functions** from the drop-down list.
- Select the error column option:
 - For Grant or Scholarship Unposted Applications, select **(App) \$ErrorWarning**.
 - For Accounts Payable Open Items, select **(Open A/P) \$ErrorWarning**.
- Click **Add>>**.



8. Click **Save**.

Errors and warnings now display in the Data Grid. Errors are prefaced with an “*E” and display first. Errors require action. Warnings are prefaced with an “*W.” Warnings may need action.



Tip: If the error or warning does not display fully, you can drag the cell borders to widen or heighten the cell. To save the current view, right-click and choose **Save View Settings**.

Errors and warnings for Grants and Scholarships **Unposted Applications:**

Error or Warning	Description
Error	Missing Profile record for Grantee
Error	Missing Grantee Record or Grantee Flag is Off
Warning	Grantee is flagged ACH and Application is not flagged ACH
Warning	Grantee Status - Check status before awarding
Error	Grantee Status - No grants allowed
Error	Payee not found on grantee/vendor table
Error	Application History Record exists with the same Grant Number
Error	Application may not have a blank IdCode
Error	Missing Profile Record for Mail-to
Error	Missing Mail Check to for Application
Error	Missing Profile Record for Student (<i>Scholarships only</i>)
Warning or Error	Missing Fund Scholarship Record (<i>Scholarships only</i>)
Error	Grant Number may not be less than 10000.

Error or Warning	Description
Error	Grant Amount is Zero
Warning	Grant Amount is Less than Zero
Error	Interfund grant amount does not equal Interfund gift amount.
Error	Interfund grant amount does not equal posted Interfund gift amount.
Error	Grant Date cannot be blank.
Error	Posting to a closed period.
Warning	Grant Date is not within one year of today.
Warning	Possible Duplicate Grant. Review Posted Grant #<number>
Warning	Possible Duplicate Application. Review UnPosted Application #<number>
Error	Renewal Date must be in the Future (<i>Scholarship only</i>)
Warning	Fund in application does not match any in payment plan (<i>Scholarship only</i>)
Warning	Fund was retired on <date>
Error	Missing Fund record
Error	Invalid Payment Date
Warning	Payment date is prior to Today.
Error or Warning	Grant amount exceeds balance available.
Error or Warning	Cannot match grant to available gifts.
Error or Warning	Granted amount exceeds avail to spend for <value>
Error	Autopay option invalid. Multiple lines with different payment dates or cash accounts.
Error	Line Items don't match Grant amount
Error or Warning	Application denied or withdrawn and grant amount > 0
Warning	Application has a blank payee name
Warning	Application has an invalid payee address

Errors and warnings for Accounts Payable **Open Items:**

Error or Warning	Description
Error	No voucher history record available.
Error	Missing Grantee/Vendor Record
Error	Grantee Flag is Off
Error	Vendor Flag is Off
Warning	Grantee/Vendor is flagged ACH and Voucher is not flagged ACH
Error	No A/P Line Item History record exists for Voucher=
Error	There has been an Internal Data mismatch for Open Item
Error	No General Ledger Cash Account exists for Account Key
Error	No General Ledger Payables Account exists for Account Key
Error	This voucher will exceed the available cash amount for . . .
Error or Warning	Un-met conditions for Voucher/App #:<number>

Accounts Payable

Sort Payment report by fund

In Accounts Payable, you can now sort the **Payment Selection Report** by **Fund** so you can easily view all payments to a specific fund. You can now also rerun the report.

1. In Accounts Payable, click **Reports**.
2. Choose **Payment Selection Report**.
3. In the **Selection Criteria**, choose the **Sort by Fund** option.

The screenshot shows a dialog box titled "Sims - Payment Selection Report". Under the "Selection Criteria" section, there are several fields and options:

- Pay Through Date: 01/23/2018
- Discount Date: / /
- Voucher Types: All
- ACH Payments: All Payments
- Radio buttons: Enter Natural Account Key, Enter Full G/L Account Key
- Natural Account Key: [text field]
- Program Officer: [dropdown]
- Payee Id Codes: [text field] Through: 222222
- Checkboxes: Display Fund Detail, Sort by Fund (highlighted with a red box), Released Items Only, Held Items Only
- Batches: [text field] Through: 22222222

 At the bottom are "OK" and "Cancel" buttons.

4. Choose other options for the report. See [Payment Selection Report](#) for help.
5. Click **OK**.
6. Verify the **Send To** destination, and click **Run Report**. The report displays in the FIMS Viewer with totals showing by fund.

Tip: Click **Rerun Report** to regenerate this report without needing to reenter values.

FIMS Viewer - Payment Selection Report						
File		Edit		Rerun Report		
ID	Grantee \ Vendor	OPEN	INVOICE AMT	SELECTED AMT	DISC TAKEN	
DOC #	DUE DATE	INVOICE #				
bass	John Bass Memorial Fund					
1183	Ralston Youth Center	Payee:	1183 Ralston Youth Center			
2006001601	11/04/04	20060016	20,000.00	0.00	0.00	
27	Girl Scouts	Payee:	27 Girl Scouts			
2006002401	06/19/04	20060024	1,200.00	0.00	0.00	
1181	Business Resource Ce	Payee:	1181 Business Resource Center			
2006003801	06/19/04	20060038	10,000.00	0.00	0.00	
1183	Ralston Youth Center	Payee:	1183 Ralston Youth Center			
2006004901	11/04/04	20060049	45,000.00	0.00	0.00	
27	Girl Scouts	Payee:	27 Girl Scouts			
2006005201	10/19/04	20060052	10,000.00	0.00	0.00	
1179	Schlademan House	Payee:	1179 The Schlademan House			
2006005501	10/19/04	20060055	14,000.00	0.00	0.00	
Total for fund: bass			100,200.00	0.00	0.00	
blon	Olivié Blondet Education Fund					
16	Keene State Univers	Payee:	16 Keene State University			
2006002201	03/19/04	20060022	2,000.00	0.00	0.00	
16	Keene State Univers	Payee:	16 Keene State University			
2006002202	09/19/04	20060022	1,300.00	0.00	0.00	
16	Keene State Univers	Payee:	16 Keene State University			
2006003201	07/31/04	20060032	20,000.00	0.00	0.00	
Total for fund: blon			23,300.00	0.00	0.00	

FIMS Graphical Reports

Graphical Report changes

The graphical reporting engine used by FIMS to display graphical reports was updated. The graphical reports will continue to look and function as before.

To ensure proper resolution for reporting issues, Graphical Reporting for Posting reports was removed. Use Screen views for Posting reports.

General Ledger and FACTS

Support for entries in the billions of dollars

Users can now enter a single Journal Entry for over a billion. Screens and Reports in General Ledger and FACTS were updated to handle the larger transaction amount.

DonorCentral Suggestion Import

Special Character support

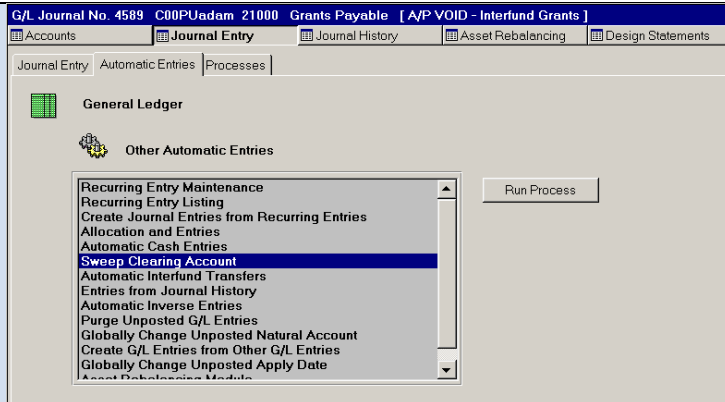
DonorCentral Import now supports special characters, such as accents or tildes. This now matches the rest of FIMS which previously supported special characters.

For any user has set a value for DonorCentral_Download_Directory, to enable this functionality and all latest functionality, that user should go to **FIMS > Tools > System Utilities > DonorCentral > Setup DonorCentral Upload** and click **Save** to refresh the tool.

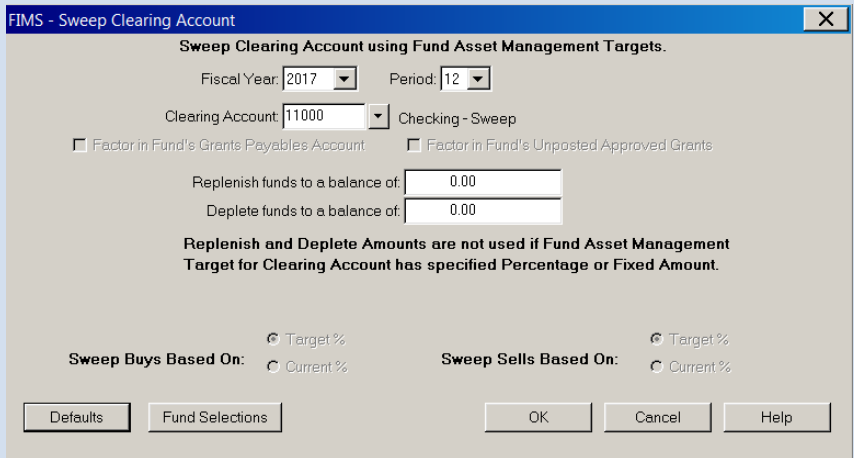
Minor Enhancements

The following minor enhancements were also added to this release.

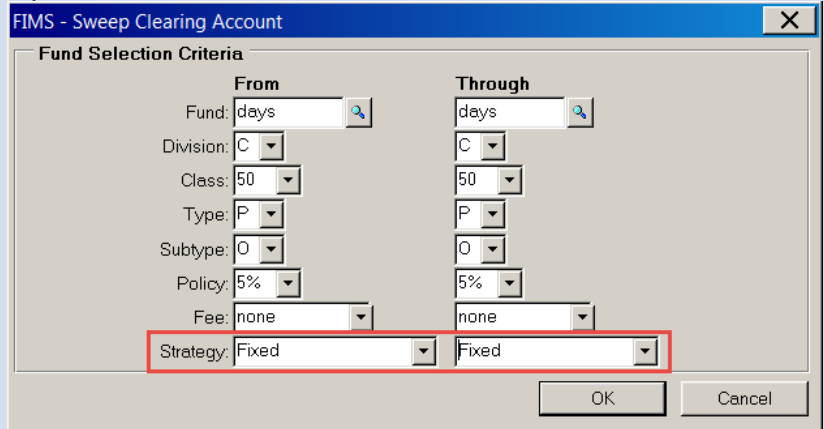
ID	Module	Description
881500	DonorCentral	In FIMS, the link to DonorCentral documentation (Help > DonorCentral Help Online) now opens to the new location for Blackbaud DonorCentral: https://www.blackbaud.com/files/support/helpfiles/donor-central/admin/dc-welcome.html
897471	DonorCentral	The Canadian charity number now displays when viewing charity information in DonorCentral and in confirmation emails.
852425	General Ledger	In General Ledger > Journal Entry , you can now choose an Asset Strategy Code and Rerun Process for some Automatic Entries so you can filter by the code. You can also now rerun the process of Sweep Clearing Account. To see the new options: <ol style="list-style-type: none">1. Go to General Ledger > Journal Entry > Automatic Entries.2. Choose one of the following options:<ul style="list-style-type: none">• Sweep Clearing Account• Automatic Cash Entries• Allocations and Entries



3. Click **Run Process**.



4. Specify options on the screen, then click **OK**.



5. To sort by Asset Strategy Code, select a **Strategy**.

6. Click **OK**.

7. Click **Run Report**.

8. (Optional) On **Sweep Clearing Account**, to rerun the process, click **Rerun**.

Tip: Automatic Cash Entries and Allocations and Entries previously offered the **Rerun** option.

<p>100116 854546</p>	<p>DonorCentra l</p>	<p>Improvements were made for updates to Profile Management's Profile 1 tab:</p> <ul style="list-style-type: none"> When changing a name field in the newest version of DonorCentral, the following message no longer displays: <div data-bbox="678 422 1333 663" data-label="Image"> </div> <ul style="list-style-type: none"> When removing an email address from a Profile, a message displays to remind the administrator that the deletion removes login access to DonorCentral for the user: <div data-bbox="678 831 1287 1106" data-label="Image"> </div> <p>Note: Removing an email address from the Profile 1 tab updates the Fund Associations tab removing DonorCentral access.</p>
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April 12 Release Resolved Issues

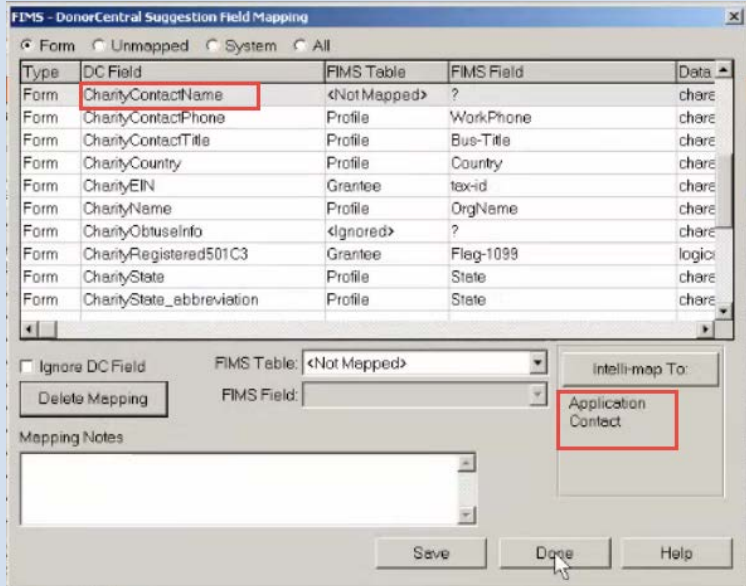
The 14.60 FIMS release dated April 12th includes resolution of the following two issues. Continue to the next Resolved Issues section to view additional fixes included in the initial 14.60 release.

ID	Module	Description
944419	Grant Imports	For those who upgraded to 14.60 with the March release version, two payment lines were created when importing Grants from DonorCentral NXT. This is now resolved.
953599	Tax Status Plus	Using the Tax Status Plus feature in FIMS no longer causes an error and works as expected.

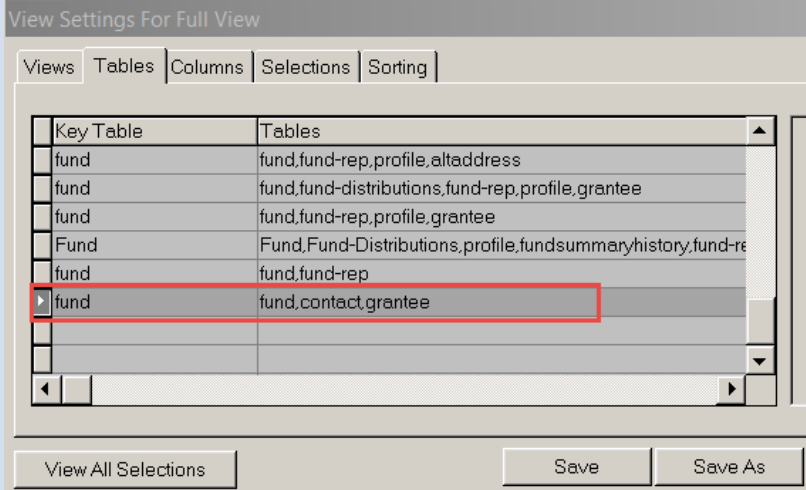


Resolved Issues

The following issues are resolved in this release. We have provided the case numbers for internal referencing along with a description of the issue.

ID	Module	Description
100463 854683	Graphical Reporting	The Send To tab in Reports with Graphical Reporting now automatically includes the .xml extension when choosing an XML file.
887273	Graphical Reporting	Opening Report Template Maintenance no longer produces an error message, and image files, such as logos, are available once again in Graphical Reports.
99599	DonorCentral	<p>When mapping the CharityContactName in the FIMS Suggestion Field Mapping, the suggested mapping now defaults to Application Contact name instead of Grantee Contact Name 1, which is an unused field in FIMS.</p>  <p>If you have already mapped to use Grantee Contact Name 1, update the mapping to use Application Contact instead. To remap:</p> <ol style="list-style-type: none"> 1. Go to Tools > System Utilities > DonorCentral > DonorCentral Suggestion Field Mapping. 2. Click the Additional Mapping button. 3. Locate Grantee Contact Name 1 and remap it to Application Contact. 4. Click Save.
100349 854853	DonorCentral	Imports from the newest version of DonorCentral now include the Grant Letter Code for the Fund.

ID	Module	Description
100466 854878	DonorCentral	<p>Import suggestions were improved so that when FIMS encounters a problem with a record, it continues handling the other records.</p> <p>To apply the change after upgrade, go to Tools > System Utilities > DonorCentral > Setup DonorCentral Upload, and click Save.</p> <p>Tip: Retrieve suggestions before removing access to DonorCentral for any Fund Representatives.</p> <p>To import suggestions, go to:</p> <ul style="list-style-type: none"> • Tools > System Utilities > DonorCentral > Retrieve Suggestion from DonorCentral • Grants Module > Import Grants shortcut button
853355	DonorCentral	<p>In the latest version of DonorCentral, the Userid and Password is no longer shown when viewing Staffer Code Listings.</p> <p>Staffer Code Listings can be viewed by going to Reports > FIMS Code Listings > Profiles > Staffer.</p>
877013	DonorCentral	<p>In Funds > Gift Detail, exports to DonorCentral (Tools > System Utilities > DonorCentral > DonorCentral Export) no longer omit the city, state, and zip code from the address information.</p>
887314	DonorCentral	<p>FIMS enhanced error messages when unable to create a Profile or Grantee for a new charity in DonorCentral Suggestion Import.</p> <p>The following areas were updated:</p> <ul style="list-style-type: none"> • Grants Module > Import Grants Shortcut • Tools > System Utilities > DonorCentral > Retrieve Suggestions from DonorCentral
100059 854829 100667 854856	Imports	<p>Validation was added to ensure that Import Record Updates do not allow imports to unused fields.</p>
854446	Data Grid	<p>In the Data Grid view, improvements were made to text wrapping and column widths to improve readability.</p>
15074 854622	Data Grid	<p>In Funds and Profiles, a new grantee query is available:</p> <ul style="list-style-type: none"> • Funds: Join of Fund, Grantee, and Contact • Profiles: Join of Profile, Grantee and Contact <p>To access the new queries:</p> <ol style="list-style-type: none"> 1. Open Profiles or Funds. 2. To the left of the Data Grid, click the View Settings icon.

ID	Module	Description
		<p>3. Select a Full view. 4. Click the Tables tab. 5. Choose the new query:</p> <ul style="list-style-type: none"> • In Profiles: profile.grantee.contact • In Funds: fund.contact.grantee  <p>For more information, see Configuring View Settings.</p>
28236 854940	Grant Payables	In Accounts Payable > Open Items > Open Item , when opening a voucher and changing the Payee to a school, the due/invoice date no longer changes from the original date to the date of a previous voucher.
27609 854942	Accounts Payable	Clicking Edit Transaction in Accounts Payable > Reconciliation > Transactions no longer causes the Transaction Date to change value.
13878340	Profile	<p>On some Windows displays, sending group emails through Address Listing with Labels & Email or the Process Selections button on Data Grids resulted in a “Do not fit in frame” message. This has been resolved.</p> <p>Updated areas include:</p> <ul style="list-style-type: none"> • Reports > Profiles > Address Listing with Labels & Email • Data Grids > Processes Tab > Labels & Email