

FIMS 14.64 Upgrade Guide

Overview

This document provides details on the process of upgrading a local, on-premise Foundation Information Management System (FIMS) installation to the latest version.

Upgrade Notes

About 14.64

FIMS 14.64 is a patch release. **You must be on version 14.60 - 14.63 to upgrade to 14.64.** This patch includes updates shipped in 14.61 – 14.63.

The 14.64 patch release does not need to be installed from the database server, so other users do not need to exit FIMS during installation.

IMPORTANT: This patch release contains a required security certificate update for all FIMS clients who use **DonorCentral v2 or v4 with Progress 11**. Install this patch **before November 4th, 2018** to get the required certificate.

If you use Progress 11 and are on DonorCentral v2 or v4 and do not upgrade by November 4th, FIMS will be unable to connect to DonorCentral. This means you will be unable to pull suggestions from or upload Fund Statements. The required security certificate to keep FIMS and DonorCentral v2 or v4 connected is automatically installed when you upgrade to FIMS Version 14.64.

Progress Database

FIMS version 14.64 supports OpenEdge Progress version 10b, and version 11.6 and later. Check your Progress version in FIMS by clicking **Help > About FIMS**. Contact Support for any assistance needed with upgrading Progress.

Current IGAM Users

If your IGAM version is older than IGAM 5.5, do not perform the upgrade. Contact Support to schedule an IGAM update at (800) 256-7772.

Microsoft Windows Operating Systems

- Workstations must have Microsoft Windows 7, 8, or 10 installed. Windows 10 is recommended.
- Servers must have Microsoft Windows Server 2008 R2 or later installed. We recommend using Microsoft Windows 2012 or later. Microsoft Windows Server 2016 is supported.
- **Windows 8/8.1 users:** Please note that FIMS is not certified for touch-screen functionality. If you notice any issues, please disable the touch-screen feature when using FIMS.
- **FIMS CRM users:** You may be required to co-install Progress 11 for compatibility with some graphical reporting features. Please contact FIMS Support for more details.
- **DonorCentral users:** Your FIMS server must have Microsoft Windows Server 2008 or later to upload data to DonorCentral.
- **IGAM users:** IGAM 3 is not compatible with Windows 7 or later. If you are currently using IGAM 3 for FIMS and want to use Windows 7, you must upgrade to IGAM 5 or later. Please contact Blackbaud Support for more information.

Crystal Reports

If you use Crystal Reports, note that reports written in Crystal Reports earlier than version 9.0 cannot connect to Progress 10.x databases.

If you have reports written in an earlier version of Crystal, you must upgrade to Crystal 10 or higher and convert your reports to use them with FIMS version 14.x.

FIMS version 14.60 and later with Progress OpenEdge version 11 requires an upgrade to Crystal version 13. See the [14.60 Release notes](#) for information.

OS

OS updates are not automatically certified but are supported when the OS vendor guarantees backwards compatibility with the baseline OS level. Certification of OS updates may be performed if the backwards guarantee compatibility of the OS Service Pack / Maintenance Pack is questionable.

Microsoft Office

Office 365 users, please note that only a desktop installation of **Office 2007/2010/2013** connected to Office 365 is fully compatible.

Support

Need Help or Have Questions?

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

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

Phone: (800) 468-8996, option 1

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

Upgrading to a FIMS 14.64 patch

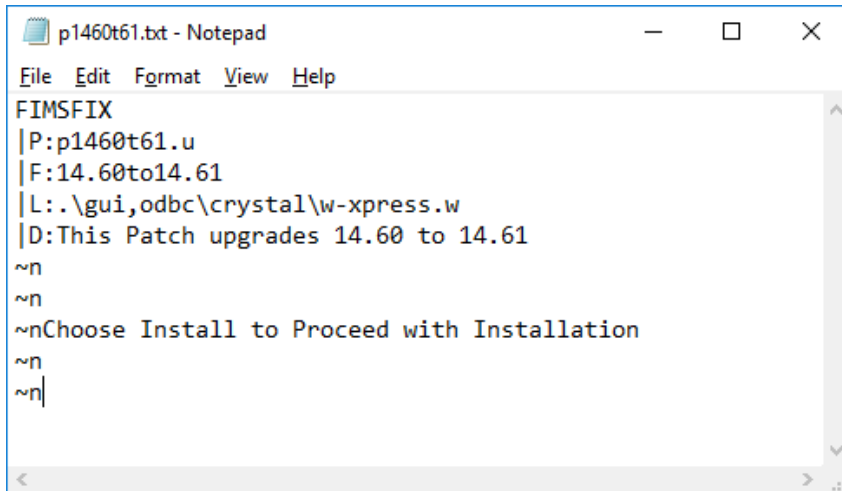
Prerequisite: You must be on version 14.60 – 14.63 to install 14.64.

1. Download **p1460t64.zip** from [Blackbaud Downloads](https://www.blackbaud.com/support/downloads/downloads.aspx) (<https://www.blackbaud.com/support/downloads/downloads.aspx>) to any workstation where you'll apply the update.
2. Copy the FIMS Patch file to a FIMS subfolder on the server or workstation on which the patch is being installed:
 - Server Location: X:\npo\found\FIMS (X is the letter of the drive where FIMS is installed)
 - Workstation location: N:\found\FIMS
3. Log in to FIMS.
4. Open **Tools > System Utilities > FIMS Update and Patch Utility**.
5. Click **Browse** and select the patch file named **p1460t64.zip**.
6. Click **Install**.
7. When a FIMS email prompt displays **Update Complete**, click **Send**.
8. In FIMS, select **Help> About FIMS** to verify the FIMS version is **14.64**.

Reference: Parts of a Patch

This section provides information about FIMS patches as reference only. There are no actions to take in this section.

FIMS patches have a .txt file with the same name as the .zip file. The first line of the .txt says **FIMSFIX**, followed by a vertical bar-separated list of instructions.



```
p1460t61.txt - Notepad
File Edit Format View Help
FIMSFIX
|P:p1460t61.u
|F:14.60to14.61
|L:.\gui,odbc\crystal\w-xpress.w
|D:This Patch upgrades 14.60 to 14.61
~n
~n
~nChoose Install to Proceed with Installation
~n
~n|
```

Additional parts of the patch include:

P: Contains the program to run from **Tools | Run Procedure** if the patch fails to run from the FIMS utility.

F: Displays the versions fixed by the patch. If the installed FIMS version is not listed, the patch will not run.

L: Lists a comma-delimited list of programs compiled by the patch. If necessary, this list can be copied, then go into **FIMS Compiler**, select **Files** radio set, and paste into path and file name.

C: Lists a program similar to the **P:** program, except it runs before unzipping anything but the patch txt file and the C: program. This can be used when necessary to backup the IGAM folder, do extra validation to see if the version can upgrade, delete .r files that would cause the upgrade to fail, etc.