FIMS 14.70 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 using a .exe file.

Clients on FIMS version 12.5 or higher can download the installation package from Blackbaud Downloads (https://www.blackbaud.com/support/downloads/downloads.aspx), and follow the instructions in this document.

Upgrade Notes

About 14.70

FIMS 14.70 is a full release. You must be on version 12.50 or later to upgrade to 14.70.

Note: At times during the 14.70 upgrade, upgrade progress can seem to stall even though it is still progressing. For large databases, the upgrade can take 2-3 hours to complete, which is expected for large databases. When the upgrade completes, the text, "Press any key to continue . . ." displays.

Progress Database

Beginning with FIMS 14.70, the minimum supported version of Progress OpenEdge is version 11.6.4. For information about upgrading to Progress 11.6.4 or later, see Knowledgebase article 189200, or to learn about moving your data to Blackbaud's hosted environment in Host*Net, contact Blackbaud.

Check your Progress version in FIMS by selecting **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.

Compatibility Notes

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 2007/2010/2013/2016** 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**.
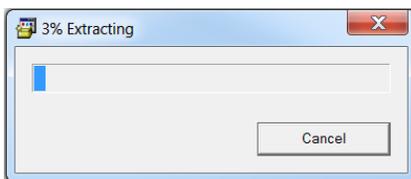
Upgrading FIMS

Before beginning, ensure all users are logged off, and all instances of FIMS are closed, meaning that FIMS is not open on any machine. The database, however, must be running.

Please see the following Prep Guide that may help avoid common upgrade issues:
https://kb.blackbaud.com/articles/Article/117534

Note: Version 14.70 is a full upgrade, not a patch. The upgrade must run on the FIMS database server, not a workstation.

1. On the FIMS database server (not workstation), double-click the **FIMS1470.exe** file to begin the installation.
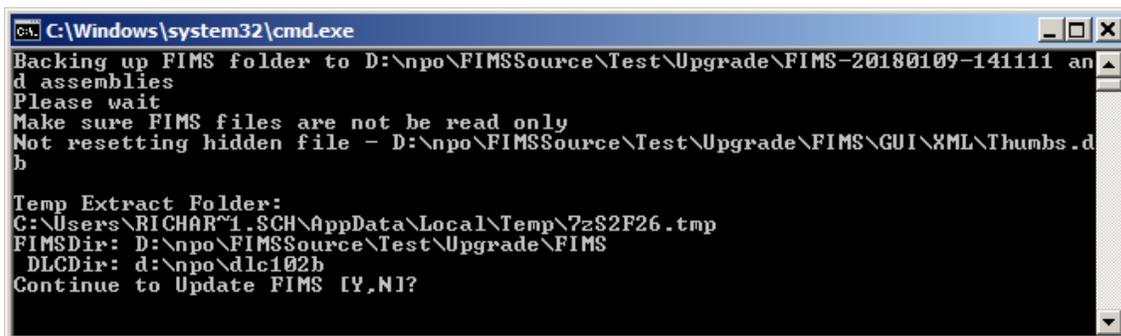

   Tip: If your browser or operating system ask whether you want to continue, choose to agree.

2. Click **Yes** to continue.

   The automated installer runs and performs the following actions:

   - Determines the last FIMS folder used
   - Determines the last DLC folder used
   - Backs up the FIMS folder
   - Removes the Read Only attribute in existing FIMS files

3. When prompted, choose **Y** to continue.

4. After the files finish copying, the FIMS Database Selection window displays. Click on the database you want to update and click **Select**.

5. The upgrade is complete when the screen prompt displays **Press any key to continue . . .** Press a key to continue. The program closes the window and deletes the temp folder.
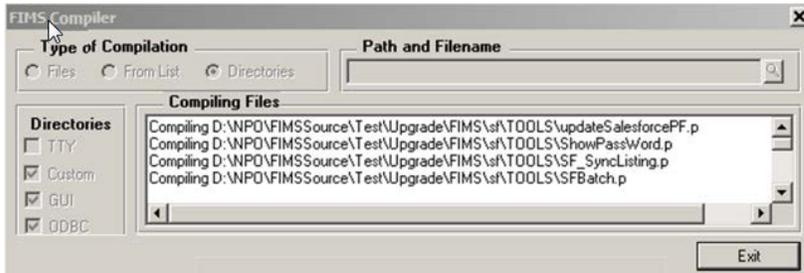
   Depending on the size of your database, the update process may take some time to complete.

```
C:\Windows\system32\cmd.exe                                    - □ X

Backing up FIMS folder to D:\npo\found-14.70\fims-20190516-100529 and assemblies ▲

Please wait
Make sure FIMS files are not read only

Temp Extract Folder:
C:\Users\laurie.parmentier\AppData\Local\Temp\7zS4F14.tmp
FIMSDir: D:\npo\found-14.70\fims
 DLCDir: d:\npo\dlc102b06
Continue to Update FIMS [Y,N]?Y
Copying files to D:\npo\found-14.70\fims

Change Directory From:
C:\Users\laurie.parmentier\AppData\Local\Temp\7zS4F14.tmp
To:
D:\npo\found-14.70\fims
Updating Assemblies
assemblies\Newtonsoft.Json-v10.dll
1 File(s) copied
Assemblies Copied

Starting FIMS Database upgrade.
FIMS database selection screen will come up shortly.
Please select your primary database for the FIMS upgrade.
Press any key to continue . . .                                ▼
```
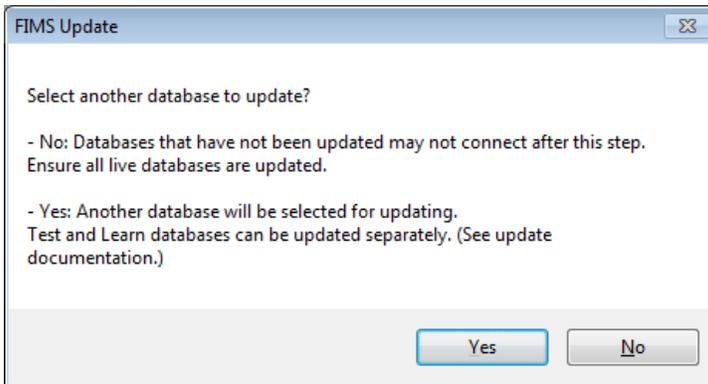
6. On the FIMS Compiler window, click **Exit**.

7. If you have multiple databases, the screen below displays. Click **Yes** to go back to repeat the above steps so you can choose the next database to update.

    NOTE: Choosing **No** may require FIMS Support to update the other databases in the future.

8. When the upgrade is complete, close the window to finish.

Updating Test & Learn Databases - Updated November 14, 2018

Note: Do not stop your live or demo database before doing this task.

The live database *must be running* to complete the **Copy Live to Demo** task. The task automatically regulates the stopping and starting of the Demo database for you.

1. On the desktop of the FIMS database server, double-click the **Copy Live to Demo** icon.

   Tip: If you don't have the icon, follow these instructions to create the task icon:
   https://kb.blackbaud.com/articles/Article/103103

2. Type in **Y** and press Enter when prompted in the command window. A backup of the live database completes, then a list of files displays. The live database backup restores to Demo, then the Demo database restarts.