FIMS 14.12

Upgrade Guide

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Upgrade Overview

In order to take advantage of the additional Syncing options in CRM 2.1, your FIMS install must be upgraded to version 14.12 or later.

- To request the upgrade pack, please send an email to upgrade_inquiries@microedge.com.

- This document refers to items included in the FIMS 14.12 Update Pack. Ensure this pack has been unzipped to a location on your server. As there are database schema changes, this update MUST be run from the server.

- For the purposes of this document, the path to FIMS is represented as **X:\NPO**. The actual path to FIMS on your server or workstation may be different. The InstallShield Wizard will check your current install location and adjust the path accordingly.

Update Preparations

IMPORTANT: This patch must be done from the server. No other users may be logged in during the process.

- Ensure your FIMS version is at least 12.5. To check, log in to FIMS and click **Help > About FIMS.** If currently at an earlier version, such as 12r03, contact FIMS Support to schedule an update.

- Clients who currently have FIMS version 12.5 or higher installed can download the upgrade pack from the PowerME portal and self-update to 14.12 by following instructions in the release package.

- Identify the location of your FIMS installation. This is typically X:\npo , D:\npo or E:\npo. **Not** the mapped N: drive.

  o My FIMS installation is at: _____

  o My FIMS Version is (*Help > About FIMS*): _____

FIMS Support

Please contact FIMS Support at (800)256-7772 if you have additional questions about updating your system to FIMS 14.12 or later.

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Upgrading to FIMS 14.12

Before beginning, ensure all users are logged off and all instances of the FIMS application are shut down. Your databases must remain running.

1. Extract the zip file and run the **Setup1412.exe** file to begin preparing the installation.

2. You will get a screen that looks like this.

3. Press **Next** to continue.

4. The FIMS installer will try to find where FIMS is currently installed and display that directory. If necessary, click **Change** to manually select a different location.

5. Click **Next**.

   The FIMS installer will verify the directory chosen. If the wrong directory was selected, an error message will be displayed.

   Clicking **OK** here will take you to a Finish screen and the upgrade will not be installed.

6. If the verification was successful, you will see the Progress directory window which should pre-populate with the correct path. If necessary, click **Change** to manually select a different location.

7. Click **Next**.

8. On the Setup Type screen, select which type of install is desired.
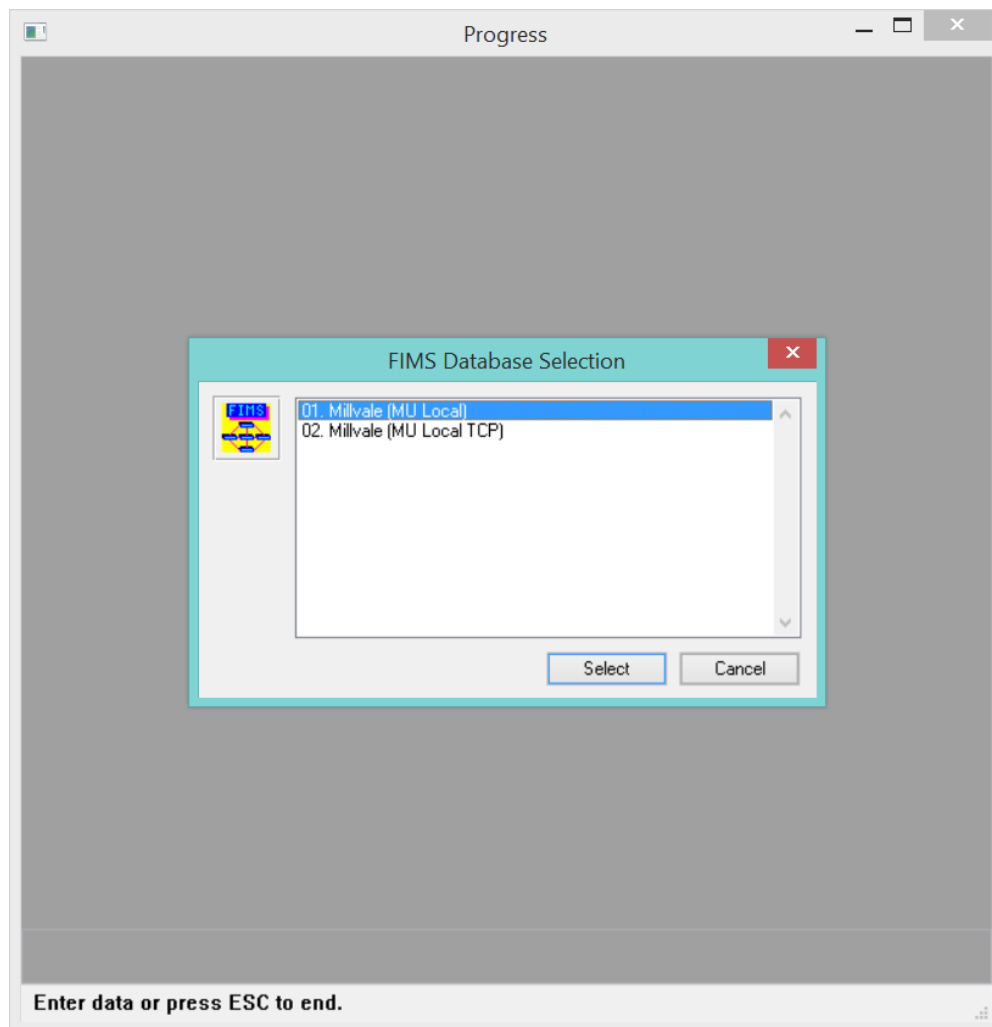
   The only difference between the three options is the backup process. Everything else installs the same.

   - **Typical:**   Backup database and FIMS directory (recommended)
   - **Minimal:**   Do not backup either
   - **Custom:**   Choose one or both to backup

   Do not skip the backups unless you are very confident in your current database and FIMS directory backups. If something goes wrong, you may not be able to recover without these.
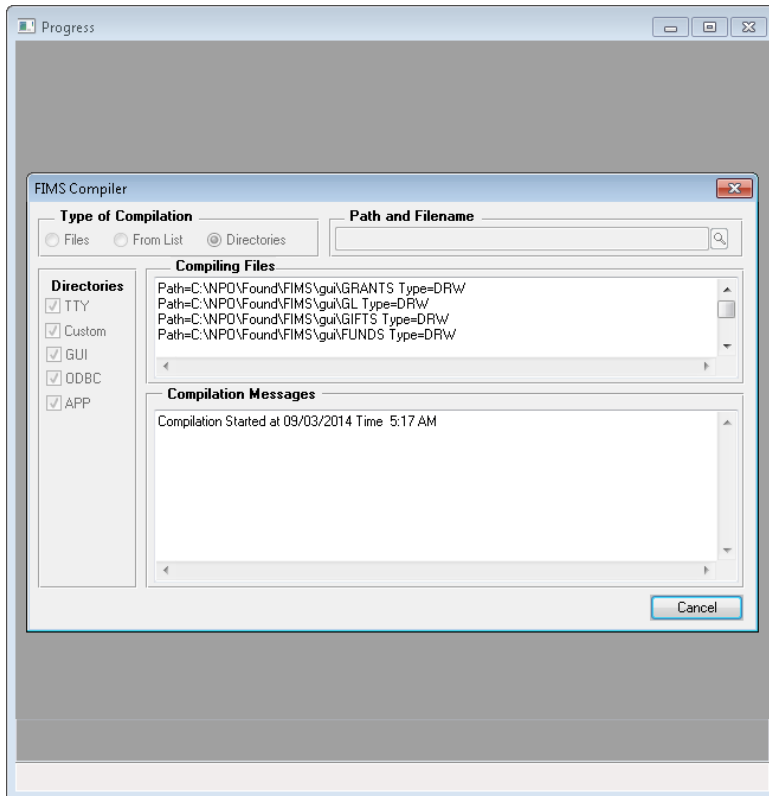
9. Click **Next** and you will go to the Ready to Install the Program screen.

10. Click **Install** and the setup will begin backing up your FIMS directory. Depending on the size of your directory, it may take a few minutes.

11. When the backup is complete, a status screen will be displayed with the progress bar.

12. Additional black screens may pop up, such as the one below, as the process continues.

13. After the files finish copying, if you have more than one database, you will see a screen that looks like this. Choose your live database and click **Select**.
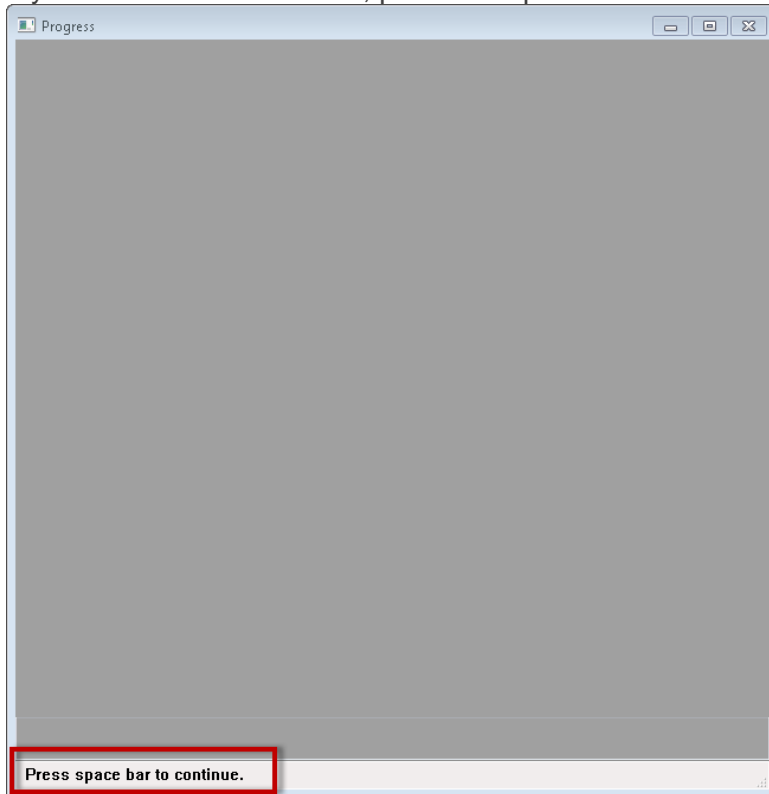

14. The FIMS Update Process screen will now state that you are about to start the update process. It will display your current version and the version you will be updating to.

15. Click the **Yes** button and wait for the screens to finish. This is updating the FIMS programs and applying all changes to the database. ***Depending on the size of your database, this process may take some time to finish executing.***

16. If you see the screen below, press the space bar and allow the window to close.

17. After FIMS is updated, if you have more than two *live* databases, you will be asked if you wish to update another database. Click on **Yes** to be brought back to step 13 above so that you can choose the next database to update.

    NOTE: Choosing **No** will most likely require FIMS Support to help update the additional databases.

18. When complete, a FIMS EMail screen with 'Update Complete!' will pop-up. Click **Send**.
    NOTE: If you get a security prompt from Microsoft Outlook, click **Allow**.
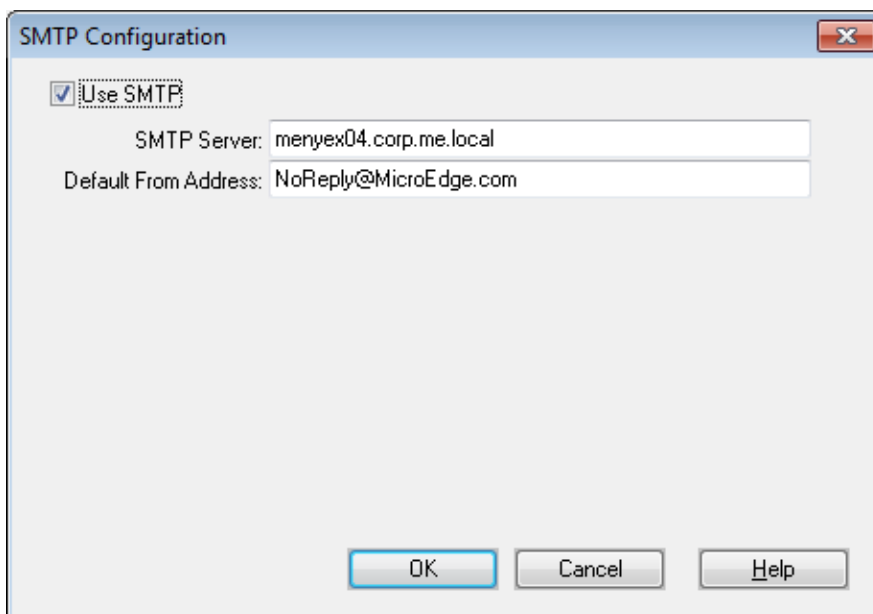
    NOTE: If your server does not have an email client installed, you have two options:

    (1) Configure SMTP in FIMS; or

    (2) Copy the Body to another document such as MS Word, Notepad or WordPad then email from a workstation.

    Configuring SMTP

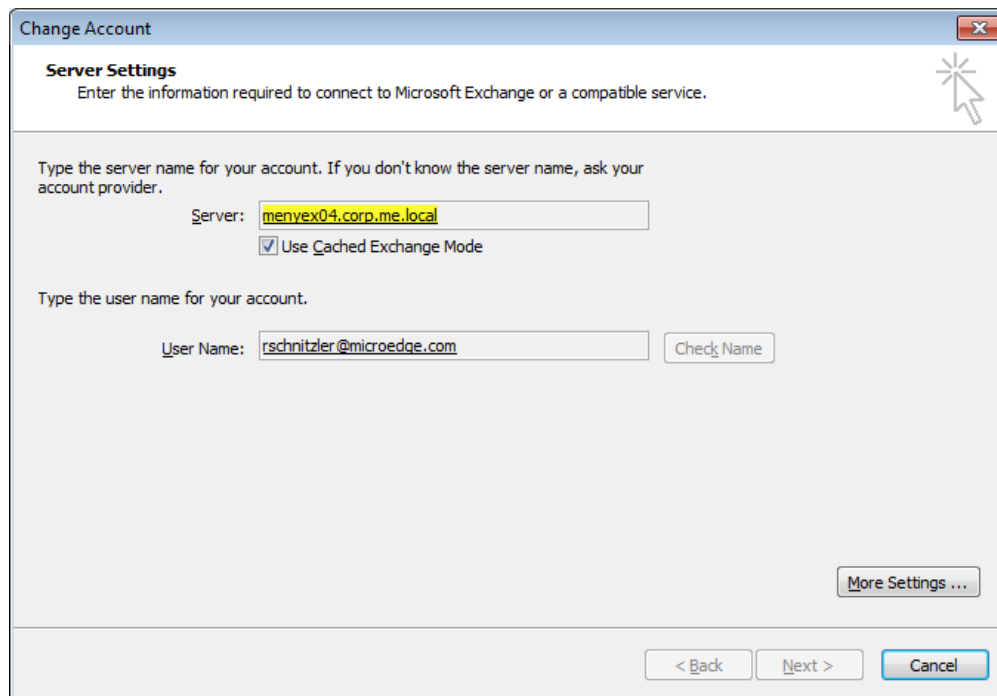   Click **Configure SMTP** and enter the **SMTP Server** and a **Default From Address**.

    If you do not know your SMTP Server, you can go into Mail Account Settings through your Email Client or through Control Panel and click on **Change Account**.

    (continued on next page)

The information in the **Server** field will be your SMTP Client.

Make sure to click **Cancel** when done.

19. When the InstallShield Wizard Completed message is displayed, click **Finish**.

20. Windows may need to register some behind the scenes controls that were updated. To do this, you just need to log in to FIMS and execute the steps below on the server. Log in to FIMS on the server and click the **Profiles** button.

21. A *FIMS 14.x Upgrade* prompt will be displayed.

22. Allow this process to run to completion and then the Profiles module will appear.

Updating Test & Learn Databases

1. Double click **Stop All DBs** shortcut on the server desktop.

    a. Wait about 30 seconds. It takes a moment for the databases to fully shut down.

2. Double click **Copy Live to Demo.**

3. Type in **y** and press **Enter.**

4. Once the DOS window has closed double click **Start All DBs.**