

## Upgrade Overview

This document contains brief summaries of the enhancements and issues resolved in FIMS version 14.21.

### Upgrading to FIMS 14.21

**Host\*Net clients** are scheduled to be upgraded on Feb 20, 2016. Please be advised, the servers will be down from 8am to 5pm EST.

The General Release of FIMS 14.21 is scheduled for February 22, 2016.

Clients who are currently using FIMS version 12.5 or higher and wish to upgrade to FIMS 14.21, may send an upgrade request to the [upgrade\\_inquiries@microedge.com](mailto:upgrade_inquiries@microedge.com) mailbox. You will be able to self-update to 14.21 by downloading the installation zip file from MicroEdge and running the Setup.exe file once extracted.

Clients with a version of FIMS prior to 12.5 must request the upgrade by emailing [fimssupport@microedge.com](mailto:fimssupport@microedge.com).

### Progress 11.6 for CRM Clients

Please be advised that in early 2017 Salesforce.com will be upgrading the security on their production sites by requiring the use of TLS 1.1 or higher for connections to salesforce.com and their API.

To be compatible with this change, FIMS Support will be contacting CRM clients soon to schedule time to install Progress OpenEdge 11.6 alongside the current 10.2b version. This install enables the more secure communication between FIMS and Salesforce.com.

**Internet Browsers:** Users should not experience an impact accessing Salesforce in browser(s) unless they are using a non-supported browser or the supported encryption protocols in the browser have been disabled. To quickly test browser compatibility, users can visit the Salesforce [test site](#), which has TLS 1.0 disabled. If they are able to view the site without errors, access to Salesforce via your browser should not be impacted by this change.

For more details, please refer to the compatibility guidelines in the following article: <https://help.salesforce.com/apex/HTViewSolution?id=000221207>.

## FIMS Support

### Need Help or Have Questions?

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

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

**Phone:** (800)256-7772

**Email:** [fimssupport@microedge.com](mailto:fimssupport@microedge.com)

**Online:** Login to PowerME at [www.microedge.com](http://www.microedge.com). Click the **Case** tab at the top of the homepage and click 'Create New Case'.

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## New Features

FIMS 14.21 provides enhancements in several areas that can make your experience easier and more efficient.

### Minor Enhancements

ID	Module	Description
339162	Accounts Payable	The IRS_Transmitter_Control_Code can now be set in System Options for AP. If not set, 09Y29 will be used. The code can be used in both of the 1099 Vendor reports.
319706	Data Grids	Inquiries>Dynamic Data Grid Added GL Chart for use in Dynamic Datagrid Inquiry.
320659	Datagrids and Reports/Exports	This allows you to select the State from a drop-down instead of typing in the value without a table reference.
TFS 17521	FACTS	FACTS>Processes>Unitization Report Reports>FACTS>Unitization History report Improved the output to spreadsheet with Display Book Values by separating <i>Realized Gain Loss</i> and <i>Unrealized Gain Loss</i> into different columns.
332261	Funds	Funds>Distributions tab>Payment fields Added a <b>Clear Payee</b> button to the Fund Distributions tab to clear the Primary Payee Contact. This matches the functionality found on the Grantee and Vendor tabs elsewhere in the system.
TFS 07973	General Ledger	Titles and subtitles will now center correctly for the basic layout in Columnar, Fund Statements and Consolidated Statements no matter how many columns are in the report.
TFS 15956	General Ledger	The number of class codes displayed in the Master Chart has been increased to 40 from the original 20.
332376	Gifts	Added a new column to combine Gift and Non-Gift in the Special Donor Export Listing. If Gift plus Non-Gift total is zero, the system will include the gift in the gift count.
TFS 17717	Grants	Grants>Application History>Adjustments>Correction - Grant Date>Help button The Help button text for Correction - Grant Date now reminds users to make Journal Entries when the date adjustment crosses fiscal years. "If the date change spans fiscal years it may be necessary to create manual adjusting journal entries."
TFS 16579	Reports: Grants	Reports>Grants>Foundation Center Survey Export Due to updated requirements by the Foundation Center, <b>Fund Name</b> and <b>Grantee Email Address</b> columns have been added to the export.
323190	Scholarships	Reports>Scholarships>Export Application History The following options have been added to the App History list on the Selections tab: <ul style="list-style-type: none"> <li>• ID Code</li> <li>• Institution ID</li> <li>• Student ID Code</li> </ul>
TFS 13542	System	Tools>System Utilities>Admin Utilities>SQL Tools>ODBC 92 Configuration Improved the message for the ODBC 92 Configuration when the user does not have permission to update the Registry.

ID	Module	Description
TFS 17079	System	The 'FIMS Manual' button on the F2 page has been updated to 'FIMS Online Help' and now takes the user to the current online help webpage.

## 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
329132	Accounts Payable	The Clear Fully Paid from Open Items utility in the File Maintenance>Accounts Payable menu has been improved to removed old \$0 debit memos. Due to changes in functionality, \$0 debits shouldn't be created now.
TFS 15863 16960	Affiliations	After loading a saved report or selecting a datagrid view that had affiliations, the user was not able to reliably change the include/exclude option for those affiliations.
323538	Data Grids	Corrected an issue where Graphical Reports from Data Grids were not showing data for fields with a # sign in the field name.
TFS 18751	Funds	Resolved issue where the Date Changed, Date Added, or User Changed by fields were not being updated when the Fund Class Description in Fund Class File Maintenance was changed.
309857	Gifts	If the Soft Credit Type table was empty, an error occurred when trying to add a new code. This has been fixed.
322851	GL	It is now possible to modify the Master Chart even if the fund class size in the compiled code is different. This situation would arise in only one or two FIMS implementations with multiple databases installed. ( not Live and Demo)
TFS 15621 16957	GL	Fixed a refresh issue when changing row/column on statement layout view in the Fund Statement Designer.
TFS 17611	GL	The <i>Reconcile Subsidiary Modules with G/L</i> report displayed incorrect column labels when only the Grant Expense or Grant Payable sections were checked
TFS 17346	GL	Fixed an issue in the Fund Statement Designer which caused loss of General Ledger rows and columns when a detail section had the page option set and user attempted to save.
TFS 17940	GL	Fixed two issues in the Fund Statement Designer: <ul style="list-style-type: none"> <li>In the Detail sections, the No Detail text and Section Title were switched.</li> <li>The "Save As" function was not refreshing the FSD screen afterwards.</li> </ul>
TFS 17454	GL	Fix receiving subscript out of range error for Columnar Financial Statement Maintenance when all columns are defined.
316884	Grants	The IRS Code Table allows more than 10 characters but only up to 10 characters were saved in Grantee and Applications or imported into the field.
333177	Grants	Errors occurred in the All Application report if user tried to uncheck the Use Received Date box on the front screen.
335196	Grants	Grant Import - The Primary Payee Contact Name from the fiscal sponsor was not flowing to the payee side of the application when appropriate.
335793	Grants	Loading saved reports in the Outstanding Grants by Fund report was not working for reports saved in previous versions of FIMS due to the additional

ID	Module	Description
		Display zero end balances option. This option was also not being saved when checked for newly saved reports.
319930	Interfund	The Anonymous settings on the Donor record were not flowing to the Gift when created in the Interfund module. The workaround had been to click the Anonymous box after creation. It now flows in the same manner as a regular non Interfund gift.
329310	Profile	When clicking on Profile>File Maintenance>Address maintenance, some users received 'cannot fit in frame' errors.
324113	Reports	Selecting "Format report using one line per fund" was not showing Fund Balance columns in the graphical viewer.
332626	Reports	Users received error 'Incompatible data types' and error in src\template\preslct.i when running the All Applications report if the project codes were numeric.
252140	System	SQL Views & Width Checker did not work for Query Only Progress licenses and caused upgrades to fail for some clients.
317815	System	Change Fund Codes was not updating the fund-class field in the GLYR table. This would cause issues in Crystal and Compass reporting
TFS 16961 16037	System	Corrected Canadian and British spelling of 'cheque' in many places.
TFS 17158	System	FIMS installed with Query Only Progress could not compile programs from the FIMS menu.
338287	System	<p>When exporting to PDF from Fund Statements&gt;External Statement&gt;Preview a DLL error occurred for "wPDF400A.dll was not found".</p> <p><b>Workaround:</b> Go to n:\found\fims and right-click on P10_DLL.CMD then Run as Administrator. If Run as Administrator is not available try double-clicking to apply the changes. If neither works, the network's IT staff will have to solve issue by mapping the N: drive to the NPO folder.</p>