

FIMS

Release Notes v14.40

Upgrade Overview

This document contains brief summaries of the enhancements included and issues resolved in the FIMS version 14.40 update.

WARNING: Customers using locally installed FIMS with FIMS Compass should not activate the complex password feature included in this patch. You can, however, still download and work in the 14.40 patch, just without complex password. The FIMS Compass/complex password issue will be addressed in a future patch release.

Host*Net clients are scheduled to be upgraded on February 11, 2017, during scheduled maintenance downtime.

As of February 13, 2017, clients who are on FIMS 12.8 or later may contact support and request the full FIMS upgrade to 14.40. See [FIMS Support](#) for contact details.

Clients with a version of FIMS prior to 12.8 should contact support online or by phone. See [FIMS Support](#) for contact details.

FIMS Support

Need Help or Have Questions?

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

Online: Login to PowerME at www.microedge.com. Click the **Case** tab at the top of the homepage and click 'Create New Case'.

Phone: (800)256-7772

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

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FIMS 14.40: Enhancements

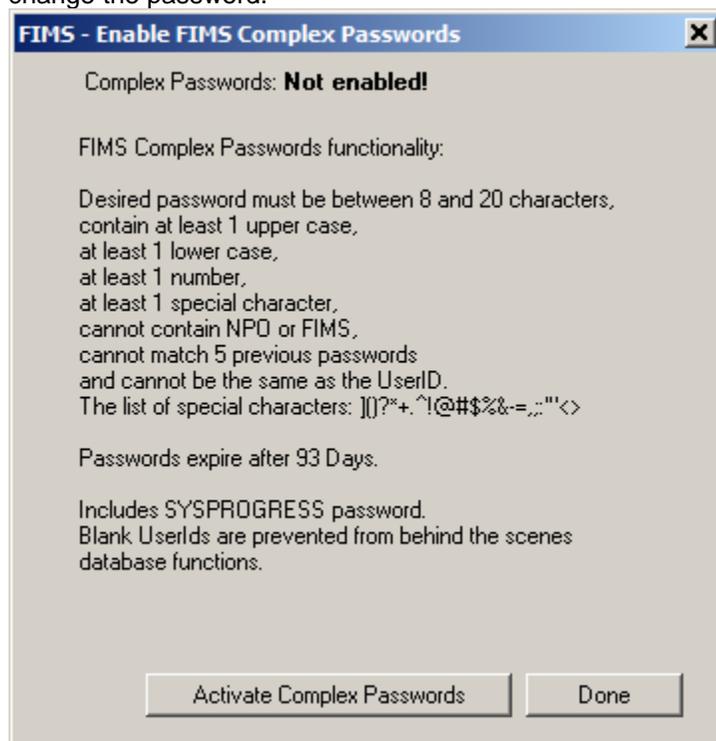
The following enhancements are included in this release.

New FIMS Complex Passwords Option

Note: Members of the support team occasionally need to utilize the npo login to perform FIMS tasks. Without this login we may not be able to assist with some items, so we encourage foundations to either contact Support with the npo login credentials or make sure users contacting Support for assistance have this information handy.

Tools >> System Utilities >> Enable FIMS Complex Passwords

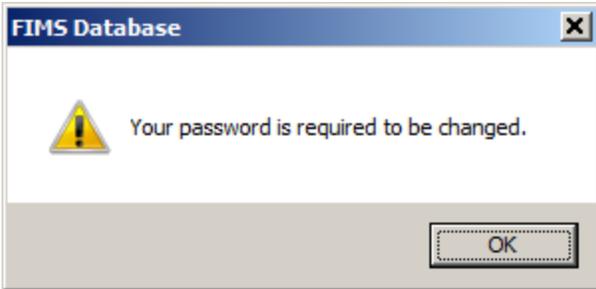
When enabled, the user is checked to see if the password has expired or needs to be reset. If so, the user is prompted to change the password.



When complex passwords are enabled, all users are required to change the password the next time they log in.

When the System Administrator adds a new user or changes their password through **Establish System Users** the user is required to change their password the next time they login in.

Example of user needing to change their password.



Example user not providing a proper complex password after changing.



Tools >> System Utilities >> System Reports >> System Users Report

The **System Users Report** now shows the Date Password last changed and 'Expired' next to users. The expired status appears if the user password has expired or the user hasn't changed the password since the administrator enabled complex passwords or added/changed the password in the **Establish System Users** tool in **Tools >> System Utilities**. The Date last changed will show whether or not Complex Passwords are enabled.

Special Notes regarding complex passwords

FIMS CRM: Enabling complex passwords changes the SFNPO password for FIMS CRM. This should have no effect unless you use a salesforce.pf different from the one that exists in the \Found\Configfiles directory.

SYSPROGRESS: Enabling complex passwords changes the SYSPROGRESS password. This may affect clients who setup their Crystal Reports Design Statements or FIMS Compass using the sysprogress credentials. Clients should use another userid and password for ODBC/SQL connections.

Note: Crystal Reports run directly from FIMS using the **FIMS Crystal Viewer** are not affected, as they always use the credentials of the person logged into FIMS.

FIMSInternal User: This user is added to all client databases during the upgrade to 14.40. The FIMSInternal User is used for scheduled tasks such as DonorCentral nightly upload and Offline Dashboard Refresh. It is also used with internal processes such as Field maker Commit, FIMS Compiler and SQL Widths Update.

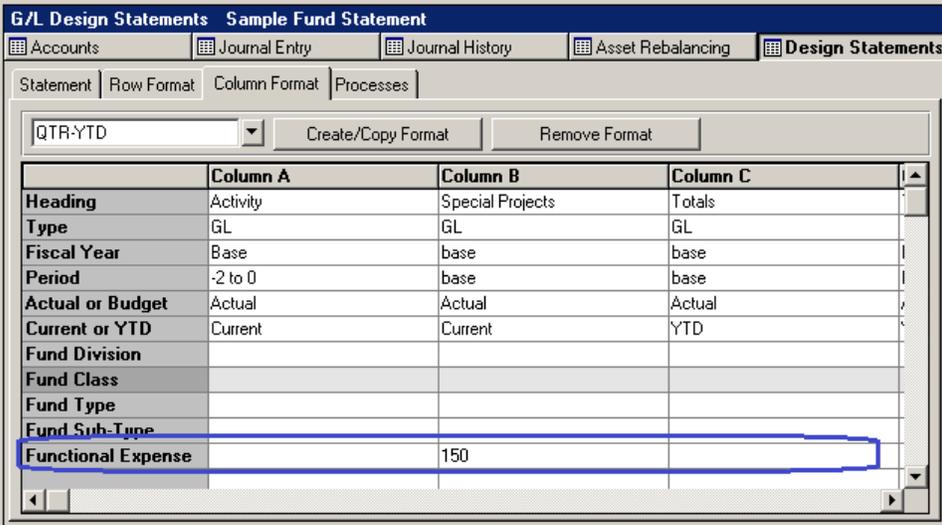
Note: Removing or changing the FIMSInternal User results in the failure of these types of system functions. Running FIMS processes externally through non-standard FIMS calls will not work when complex passwords are enabled.

Host*Net: During the upgrade to 14.40 SYSPROGRESS and FIMS CRM password updates have been automatically applied to Host*Net FIMS.

Enabling the Windows Task Scheduler to do the nightly upload is a separate step from saving. This should be done from the FIMS server or a machine that is known to always be running at the time the upload is scheduled.

NOTE: Creating a Scheduled Task through this utility will likely require FIMS to be run as Administrator (right-click on FIMS shortcut).

Other Enhancements

ID	Module	Description
11285	AP	Added ACH Institution Number and ACH Branch Number to the Check Export.
12001, 364269	GL	<p>Prior to FIMS 14.30, when you create a design statement from scratch, you could create a row format and a column format that would display the various account key segments in different columns by using the filters on the column. You were able to take a basic P&L row and marry it to a column that filtered on perhaps the various fund classes and totaled them up. This way you could see Endowed funds in column 1, Pass thru in 2, Operating in 3 and the Total in 4. You could also display department budgets in the various columns using the functional expense codes.</p> <p>With 14.40, fund statements now support Functional Expense Column Filtering.</p> <p><i>General Ledger >> Design Statements</i></p>  <p><i>File Maintenance >> General Ledger >> Fund Statement Designer >> Right-Click on desired Column >> Edit Column</i></p>

ID	Module	Description
		<p>The screenshot displays the FIMS Fund Statement Designer application. The main window is titled 'FIMS Fund Statement Designer' and contains several sections: <ul style="list-style-type: none"> Statement: Workshop 2 Description: Sample Fund Statement Base Year: 2015 Base Period: 13 Row: Robyn Column: QTR:YTD Saved Report Settings Us: ws2, Skip Prompts (checked), Preview button. Test Values Used for Disp: Fund ID: schnit, Display Values button. An 'Edit Column' dialog box is open in the center, with the following details: <ul style="list-style-type: none"> Heading: Special Projects Type: Calculation, GL (selected), Percentage Formula: [Searchable field] Options: Actual, Budget, Current, YTD Fiscal Year Relative to Base Year: 0, base External Statement: Absolute, Relative to Base, Period From: 0, Through: 0, Hide Column, Period: base Print Formatting: L1.00URight x4.25, Edit button. Column Filters: Functional Expense: [Dropdown menu] A context menu is visible on the right side of the main window, listing options: Edit Row, Add Row, Copy Row, Remove Row, and Edit Column (highlighted). Blue arrows and text annotations highlight the 'Edit Column' button in the context menu and the 'Column Filters' dropdown in the dialog box. A text box at the top of the screenshot reads: 'Right-click on a row or column to display additional options.' </p>

FIMS 14.40: Resolved Issues

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

ID	Module	Description
14105, 367745	DC	A grant paid in multiple years with the same check number (common for interfund grants) was combining the grant on DC and showing it once even if coming from multiple funds.
11217	DC	Quarterly Market Values were not being uploaded correctly for clients on a non-calendar fiscal year that didn't end June 30 but uploading at calendar year.
16305	DC	The DonorCentral Option Scholarship_Use_Grantee_Or_Student_Name has been removed. Previously the name showed up differently for outstanding scholarships than it did for paid scholarships. Paid scholarships were ignoring this option. The option was in conflict with the Show_Grantee_and_Payee_if_Different option. Now the grantee is shown whether it is outstanding or not. Or both payee and grantee is shown with the second option. The student name is normally displayed from the Program Name so there is no loss of information on DonorCentral.
11217	DC RTS w/ FIMS CRM	Clients who had FIMS CRM with DC Real Time Sync enabled were getting a SFNPO*fd_master.txt file after every sync.
13295, 366264	FIMS CRM	Mapping Salesforce Check Box fields to FIMS fields was preventing any FIMS CRM Syncing. Now the FIMS CRM Sync Mapping prompts when you map a FIMS logical field to a Salesforce check box field.
12692	FIMS CRM	In the past when FIMS was unable to connect to the Salesforce web service, the response was logged. This has now been restored. Below is a sample logged response. <i>10/25/2016 11:01:35.471 Unable to connect to salesforce web service.(LOGIN) Web service operation login generated a SOAP Fault. SOAP faultstring is: INVALID_LOGIN: Invalid username, password, security token; or user locked out. (11506)</i>
12879	FIMS CRM	The compare FIMS to FIMS CRM process was generating errors if any of the key fields had double quotes. An example would be an affiliation code of "Y" meeting.
11279, 363056	FIMS CRM	When affiliation codes are removed from FIMS for the same profile that changes were made on SF, the FIMS removals were ignored. Now the affiliation code removals are synced to SF. Then during the subsequent sync SF changes are synced to that profile.
15571, 371285	Funds	Fixed an issue with a bad pop-up message being displayed before values were keyed in when creating a new fund distribution record.
11213	Funds	Fund Representative Type Code Maintenance allowed users to change the Rep Type Code or delete it altogether when Fund Associations existed with that Rep Type Code. Now users can no longer change the code and can only delete it if no Fund Associations exist that use that code. FIMS Code Listings for Rep-Type shows the appropriate columns based on whether DonorCentral is enabled and DC version.
8386, 357372	Gift Imports	Gift and Kimbia Imports where assigning an idcode of 0 for Memorial and CC Id Codes when it should have been blank. Memorial ID caused a warning on the gift import and CC ID code didn't allow gifts to be created.
12443, 364849	Gifts	Donor History Soft Credit donor name field had the wrong value displayed if gift donor was an organization profile.

ID	Module	Description
13181, 366135	Gifts	Some clients reported that while searching through Gift History, they would get a message that a record had changed and were prompted to Save. It was comparing the gift GL Account's fund coding to the gift date year and if they didn't match, FIMS wanted to change it. The difference was likely caused by users doing a fund code change for some years but not all. This occurred in Unposted Gifts as well. Also corrected Unposted Gifts to change the GL Account's fund coding when changing the gift date to a different year where the fund coding is different.
12531, 365038	GL Statements	Fund Statements Export and Consolidated Financial Statement Export had the wrong column names if the column was hidden. This has now been fixed. Note: All columns are exported in the fund statement export.
9497, 359354	Grants	Fixed issues adding a Grantee Contact Person with an alpha-numeric idcode and no first and last name.
11813, 363524	Grants	Fixed issue with Paid Fund Adjustment when changing the fund and amount and placing the balance in another fund.
13547, 367052	Grants	Fixed confusing Scroll Bar and Repositioning issues with Grant Adjustments when adding additional lines. Issues seemed to be more prevalent on Windows 10.
14074	Grants	ACH information was not pulling correctly when using Grant Import. ACH information was pulling from the first line in the grant import and placing that profile's ACH information on all subsequent applications.
15461, 370860	Grants	Alt Contact field was not flowing to the imported application when designated for Grant Import.
12172	Grants	Widen Grantee Status Lookup so there are no horizontal scroll bars.
11235, 362997	Profiles	Commas were not being placed into the report name or joint or alternate name when there was a suffix. It was been working correctly on the individual name.
12879	System	Could not upgrade, do a Fieldmaker Commit, or update SQL Views because of Progress Enterprise Database connection issue. This only affected clients who had Progress settings beyond what FIMS Support and Services delivers.
13429	System	Solved issues updating SQL Views when the FIMS folder is write protected. An issue on Host*Net because the FIMS folder is write protected.