

FIMS

Release Notes v14.41

Upgrade Overview

This document contains brief summaries of the enhancements included and issues resolved in the FIMS version 14.41 update.

Host*Net clients are scheduled to be upgraded on March 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 14.41. 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. 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 14.41: Enhancements

The following enhancements are included in this release.

Migrating to DonorCentral

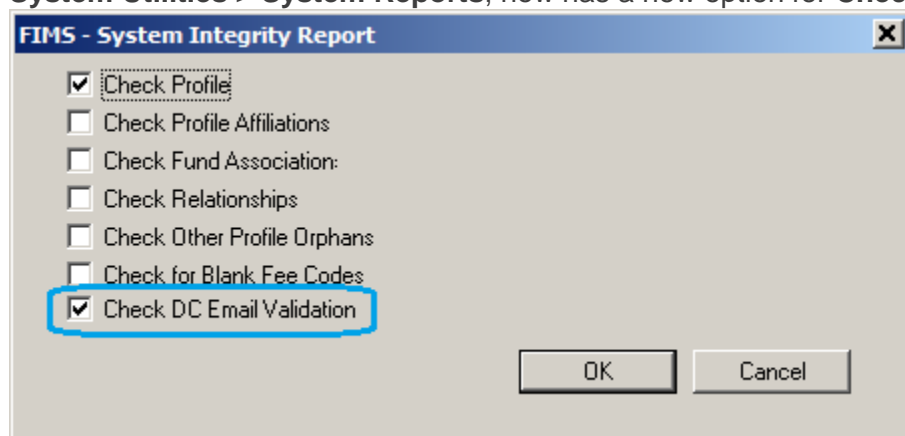
FIMS has been changed to support **DonorCentral**. Some of these changes apply to **DonorCentral** v4 and others are meant to continue to support **DonorCentral** v4, while **DonorCentral** is configured to go live.

Preparing for DonorCentral

Email addresses

DonorCentral requires all users to have a unique, non-blank email address on the **Profile 1 tab**. This is essential as the email address is the **UserID** for **DonorCentral**.

To help identify records that need adjustment, the FIMS **System Integrity Report**, located under **Tools > System Utilities > System Reports**, now has a new option for **Check DC Email Validation**.



- This new option checks emails for only **DonorCentral** Advisors and Staff.
- Clients should use this new option to clean up records with blank or duplicate emails before moving to **DonorCentral**.
- **DonorCentral** clients should also select **Check Profile** to ensure that email addresses are valid. See [FIMS 14.20 Release Notes](#) for more information on the **System Integrity Report**.
- The **Upload to the DonorCentral** and **Real Time Synchronization (RTS)** processes skip advisors having duplicate emails for the same tenant or blank email addresses. All **DonorCentral** advisors and staff will continue to upload for the **DonorCentral** v4 during the migration process.

Staff members who are also advisors

- Staff members who are also fund advisors can use the same email as the user ID.
- If you prefer not to, make sure the Profile 1 Tab uses a different email address than the Staff Code table.

Configuring uploads to both DonorCentral v4 and DonorCentral

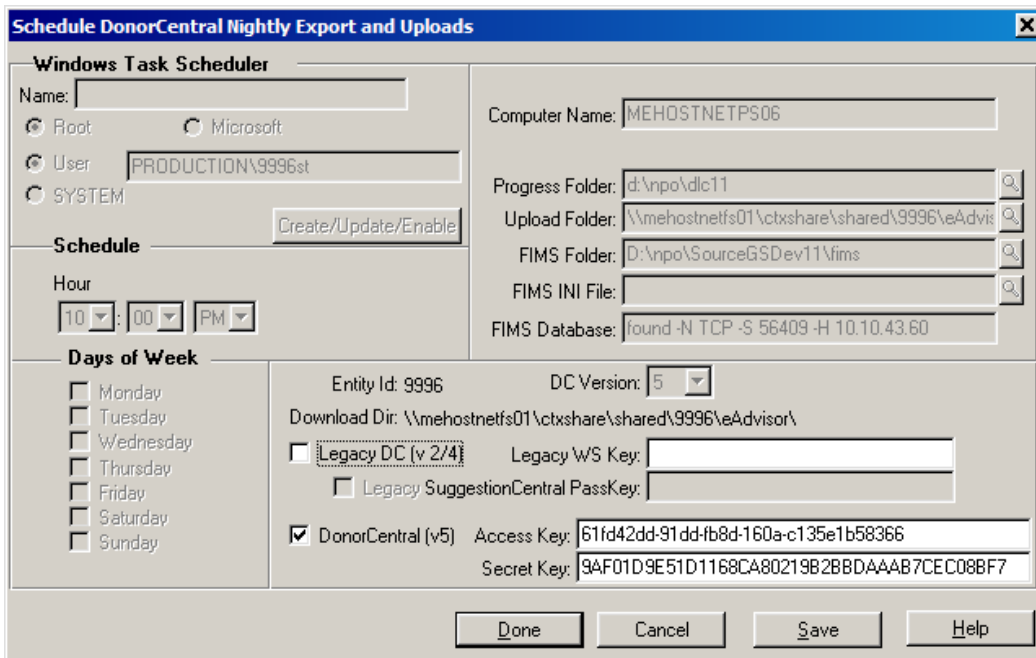
- **Tools > System Utilities > DonorCentral > Schedule Nightly Uploads**

- The **DonorCentral Schedule Nightly Uploads** utility now handles **DonorCentral** as well as the upload files for earlier versions of **DonorCentral**. Scheduling tasks has been corrected to handle the modern Windows **Task Scheduler**.
- When configuring for **DonorCentral** the first time, the utility reads the existing settings from FIMS and the **DonorCentral** v4 upload configuration.
- When the DonorCentral Tenant is created for your organization an NXT Access Key and Secret Key are provided and entered into this screen and saved.
- These keys are required for the **DonorCentral** (v5) check box.
- Both **DonorCentral** (v5) and **DonorCentral** (v 2/4) can be checked at the same time, while still using **eDonorCentral** to upload matching data to **DonorCentral**.
- When going live with **DonorCentral**, **DonorCentral** (v 2/4) should be cleared.

- 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.

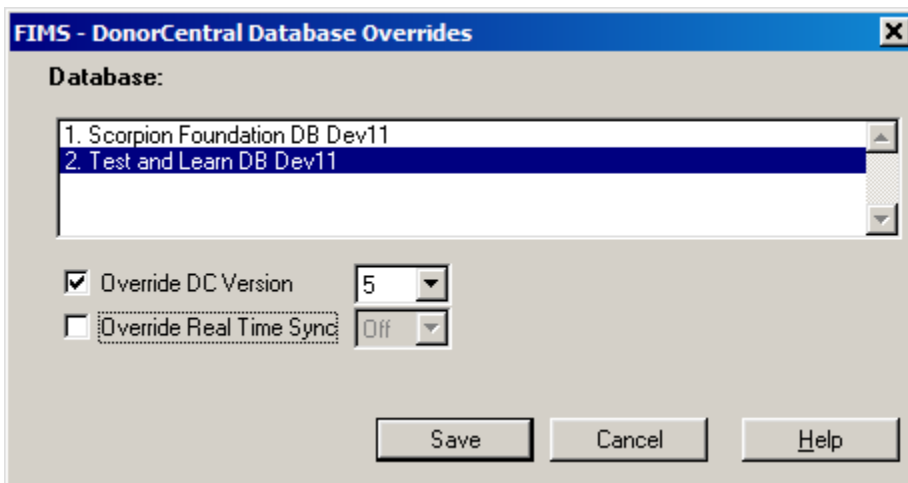
NOTE: Creating a scheduled task through this utility will likely require you to run FIMS as Administrator: right-click on FIMS shortcut.

- The **Task Scheduler** function is not available on Host*Net.



Using FIMS Test & Learn Database

- The FIMS Test & Learn Database allows you to test importing grant suggestions without bringing the import data into your live foundation database.
- We have provided a way to save the **DonorCentral** version and Real Time Sync enablement in the FIMS INI, so when the Live database is copied to the Test & Learn those settings are not lost.
- To run this process, select **Test & Learn Database>Override DC Version** and choose “5.”



NOTE: The **FIMS Real Time Sync** options are stored in the FIMS database, so long as your foundation has **Real Time Sync** enabled and the Live database copied to the Test & Learn are set up so that anyone making changes in the Test & Learn would be automatically synced with the Live DonorCentral. **This enhancement is available whether migrating from DonorCentral v4 to DonorCentral or not.**

- To run this process, select **Test & Learn Database>Override Real Time Sync** and confirm it is set to “Off.”

WARNING: If you are migrating to *DonorCentral* you can leave Real Time Sync on for Test & Learn because it will be syncing with *DonorCentral*. Once *DonorCentral* is live, it is best to override Test & Learn so that it doesn’t sync to the Live DonorCentral.

FIMS changes when Live with DonorCentral

DonorCentral is no longer visible on the **Profile 2** tab as it now uses the email address from the Profile 1 tab.

New View

FIMS - Profile Management - 01. FIMS12 MU DEV-FOUND116

File Edit View Record Reports Inquiries File Maintenance Tools Custom Help

Profile 2697 100 Black Men Inc - Boston Chapter

Donor + Giving History Promises Grantee Grantee History Vendor Vendor History Fund Associations

Profile 1 Profile 2 Salutations + Affiliations Alternate Addresses Contacts Notes Relationship

Special Mailing and Handling Controls

Solicit Spec. Handling:

Allow Mail Mail To:

Bulk Mail Recipient: 2696 100 Black Men Inc - Boston Cha

User-Defined Codes

Newsletter:

Ann Report:

Mail Type:

Carrier Rt:

Partner

Prefix: First: M.I.:

Gender: Unknown Last: Suffix:

Work:

Partner Email:

Partner Nickname:

Profile Added: 02/19/2013 Changed: 06/18/2015 By: npo

Check box to enable Solicit.

DonorCentral v4 view has not changed

FIMS - Profile Management - 01. FIMS12 MU DEV-FOUND116

File Edit View Record Reports Inquiries File Maintenance Tools Custom Help

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Allow Mail Mail To:

Bulk Mail Recipient: 2696 100 Black Men Inc - Boston Cha

User-Defined Codes

Newsletter:

Ann Report:

Mail Type:

Carrier Rt:

Partner DonorCentral

Prefix: First: M.I.:

Gender: Unknown Last: Suffix:

Work:

Partner Email:

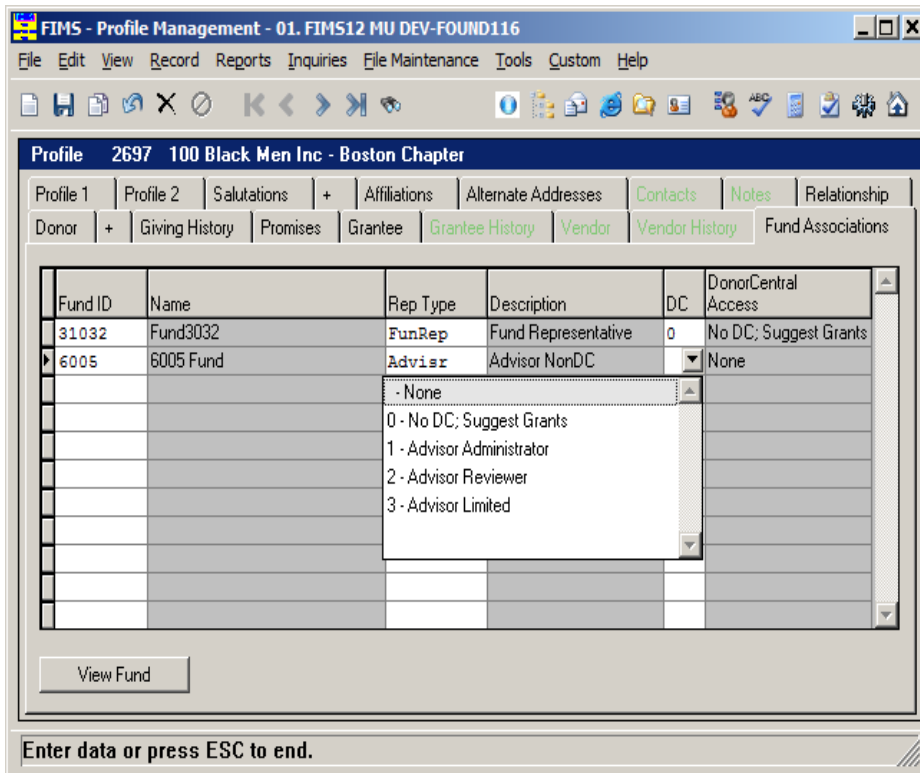
Partner Nickname:

Profile Added: 02/19/2013 Changed: 06/18/2015 By: npo

Check box to enable Solicit.

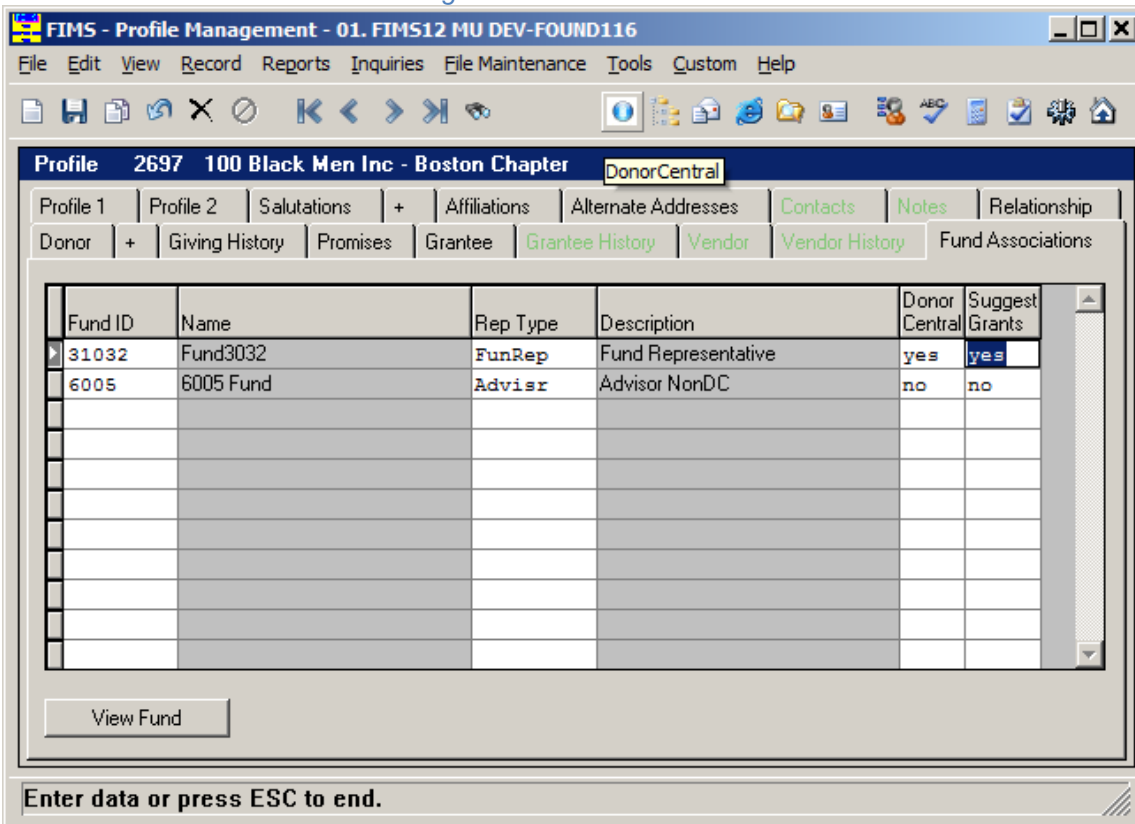
The Fund Associations tab in the Profile and Fund modules has changed in **DonorCentral**.

New View



- Rather than having separate columns for **DonorCentral** and **Suggest Grants**, we added a new column labeled **DonorCentral Access** that provides the following choices: **None-No DC**, **Suggest Grants**, **Advisor Administrator**, **Advisor Reviewer**, and **Advisor Limited**.
 - **DC** column remains blank until it is assigned
 - **DonorCentral Access** column displays the access
 - **DonorCentral** will upload based on the **DonorCentral** v4 hidden fields
 - There is a utility that fills in the blank values, but it should not be run until **DonorCentral** is live
 - The first four choices are existing functionality based on the columns no longer seen on the Fund Associations tab
 - **NOTE:** The fields still exist and are updated when changing **DonorCentral Access**, and so are existing reports, data grids, merge documents, and etc.
 - The "Advisor Limited" option is an additional level of access in **DonorCentral**
 - When adding or updating a Fund Association in the Profile or Fund modules, FIMS does not allow the **DonorCentral** option to be enabled if it has an invalid or duplicate email. So it can only be saved as None or 0 - No DC; Suggest Grants
 - Please refer to **DonorCentral** documentation for more information on this new level of access

DonorCentral v4 view has not changed



- For clients not using DonorCentral or are still using eDonorCentral v4, the columns for the Fund Associations tab have not changed.
- Fund Representative Type Code Maintenance has received the same screen changes as mentioned above. As usual, if the user changes the DC Access, they are prompted to change the fund associations with that Rep Type Code.
- When changing a Fund Representative Type in Fund Code Maintenance to enable DonorCentral, it does not enable DonorCentral for profiles with blank or duplicate email addresses.

- **DonorCentral** uses the email for the User Id. Therefore, DC User ID and Password are removed from Staff Code Maintenance when **DonorCentral** is upgraded.

New View

The screenshot shows a window titled "FIMS - Staff Code Maintenance" with a menu bar containing "New", "Save", "Copy", "Undo", "Delete", and "Cancel". Below the menu bar is a table with the following columns: Code, Description, E-Mail, ID Code, FIMS User ID, Active, and DonorCentral Admin Type. The table contains the following data:

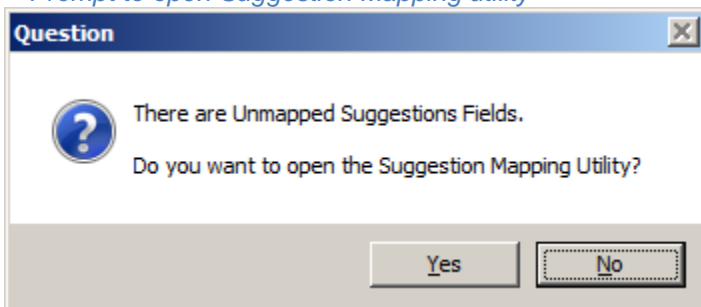
| Code | Description | E-Mail | ID Code | FIMS User ID | Active | DonorCentral Admin Type |
|------|--------------------|--------------------------|---------|--------------|--------|-------------------------|
| ATL | Andrea T. Lindholm | | | | yes | |
| BJL | Betty J. Lester | | | | yes | |
| CCT | Carolyn C. Tyler | | | | yes | |
| CH | Chris Hlusak | chlusak@microedge.com | | | yes | L |
| CM | Cate Mulvey | cmulvey@microedge.com | | | yes | S |
| JG | Jody Grengs | jgrengs@microedge.com | | | yes | S |
| LAP | Laurie Parmentier | lparmentier@microedge.co | | | yes | R |
| RAC | Ruth Carney | rcarney@microedge.com | | | yes | S |
| RMJ | Robyn M. Jaskolka | rjaskolka@microedge.com | | NPO | yes | S |

A "Close" button is located at the bottom right of the window.

DonorCentral Suggestion Field Mapping and Import

- The Suggestion Import process has not changed for clients who still using **eDonorCentral** v4.
- When choosing **Import Grants** in the Grant Module or selecting **Retrieve Suggestions** from **DonorCentral** on the **Tools > DonorCentral** menu, FIMS first checks for any new suggestions. A message appears indicating the number of new suggestions retrieved from **DonorCentral**.
- If there are any fields that have not been mapped, the user is prompted to open the **DonorCentral** Suggestion Field Mapping utility.


Prompt to open Suggestion Mapping utility



Suggestion Mapping Utility

| Type | DC Field | FIMS Table | FIMS Field | Data Type |
|------|--------------------------------|--------------|------------|-----------|
| Form | fm-application-Whoareparticipa | <Not Mapped> | ? | character |
| Form | ProgramName | <Not Mapped> | ? | character |
| Form | Purpose | <Not Mapped> | ? | character |
| Form | Purpose | <Not Mapped> | ? | character |
| Form | somelogicalfield | <Not Mapped> | ? | logical |
| Form | SpecialRequest | <Not Mapped> | ? | character |

NOTE: Click the **Help** button in the application to access the help file for more information.


- If there are any unmapped fields, the Field Mapping utility displays them.
- When the **DonorCentral** form field comes from the Default Grant Form or has the API Property Name set the same as an Application or Application Field Maker field, then the Intelli-map button on the right is enabled. For default Grant Form fields, Grant Purpose, and Special Request, FIMS suggests mapping based on the now obsolete Suggestion Central Options.
 - *GrantPurpose_15_Box*
 - *GrantPurpose_15_FM*
 - *SpecialRequest_16_Box*
 - *SpecialRequest_16_FM*
- In the **DonorCentral** Grant Form Administration the you can specify the field's API Property Name by clicking  then choosing Field API.

Example specifying Grant Form field's API Property Name


- After clicking  navigate to the API then update Property Name field to match FIMS.

Text Area Component

Display
Data
Validation
API
Layout
Conditional

Property Name 

Whoareparticipants

Field Tags 

- Fields can be mapped to Application, Application Field Maker, and Grant Notes.
- Fields can also be mapped to Profile, Grantee, Profile Field Maker, and Grantee Field Maker for new charities.
- Here are some guidelines for intelligent mapping to understand which field in FIMS to map to.

NOTE: Not following these guidelines is not a problem, as the user can manually map the fields.

- For Application or Field Maker for Application choose the API Property Name that is the same as the FIMS field name.
- For Grant Notes, use grantnote-txt.
- New charities need to prefix the field with the table, or profile or grantee, and dash. An example would be grantee-grcomment. For grantee or profile fieldmaker use fm-profile-SomeFieldName, and so on.
- Fields can be ignored and not imported into FIMS. This is preferable to leaving the field as <Not Mapped>, so users are not prompted every time suggestions are imported.
- A **DonorCentral** Grant Form field can be mapped to more than one FIMS field by clicking the **Additional Mapping** field then mapping to the desired FIMS Table and Field.
- The **DonorCentral** Grant Form field mapping makes the following **Suggestion Central Options** obsolete.
 - GrantPurpose_15_Box
 - GrantPurpose_15_FM
 - SpecialRequest_16_Box
 - SpecialRequest_16_FM
 - PaymentType_23_Coding
 - Donor_24_Box
 - Project_Description_61_Line
 - GrantPurpose_60_Code
 - GrantPurposeCode_60_FM
 - Project_Description_61_FM
 - Comment_97_Box

- Contact_Address
- Payee_Address
- Contact_Name
- Payee_Attention
- The **DonorCentral Suggestion Import** has been changed to use a FIMS data grid.
- The Default View shows suggestions where grant applications have not been created, sorted by Donor IDCode then by Date Submitted Descending.

Other views delivered with 14.41.

- All Suggestions
 - Sorted by Date Submitted Descending
- Default Fund
 - Only shows suggestions where grant applications have not been created
 - Sorted by Fund ID then by Date Submitted Descending
- New Apps by Grantee Allow Apps
 - This includes only new applications for existing grantees that have a Grantee Status Code
 - If using Grantee Status is something new to your foundation and very few Grantee records have a Grantee Status code assigned, a Grantee Status code can be added through File Maintenance with a blank code
 - Sorted by Grantee Status Allow Apps then by Date Submitted Descending
- New Apps from Allowed Grantees
 - This only includes new applications for existing grantees that have a Grantee Status Code with Allow Applications set to "A"
 - Sorted by Grantee IDCode then by Date Submitted Descending
- New Apps from New Charities
 - This includes only new applications from which the recommender chose a new charity
 - Sorted by Date Submitted Descending

Because users can create their own data grids, sorted however they wish, and these can be saved as a Foundation Default View or as a User Default View, the following Suggestion Central Options are obsolete.

- OrgExistsSort
- Sort_Requests_Ascending

Users can create applications one at a time like **eDonorCentral** or right-click on the data grid and select **Create Applications** to create one, some, or all applications in the data grid, similar to placing records on/off hold in other modules.

DonorCentral Suggestion Import

| Donor IDCode | Donor Name | Date Submitted | Requested Amount | Grantee IDCode | Grantee Name | Fund ID | Fund Name |
|--------------|-------------------------------|-------------------------|------------------|----------------|--------------|--------------|--------------------------------------|
| 362 | Mr. Richard P. Schnitzler Jr. | 03/02/2017 20:46:13.514 | 2.00 | 1499 | abcde | defgh40abcde | wilson The Wilson 14 point fund Fund |
| 362 | Mr. Richard P. Schnitzler Jr. | 03/02/2017 20:42:07.861 | 1.00 | 1499 | abcde | defgh40abcde | wilson The Wilson 14 point fund Fund |
| 362 | Mr. Richard P. Schnitzler Jr. | 03/02/2017 17:37:05.001 | 2.00 | 134 | Alaska | wilson | The Wilson 14 point fund Fund |
| 362 | Mr. Richard P. Schnitzler Jr. | 03/02/2017 17:35:27.281 | 22.00 | 1135 | ABC C | wilson | The Wilson 14 point fund Fund |
| 362 | Mr. Richard P. Schnitzler Jr. | 03/02/2017 16:30:51.941 | 111.00 | 134 | Alaska | wilson | The Wilson 14 point fund Fund |
| 362 | Mr. Richard P. Schnitzler Jr. | 03/01/2017 19:14:55.721 | 2.00 | A New | | wilson | The Wilson 14 point fund Fund |
| 362 | Mr. Richard P. Schnitzler Jr. | 03/01/2017 19:13:32.951 | 1.00 | 1499 | abcde | defgh40abcde | wilson The Wilson 14 point fund Fund |
| 362 | Mr. Richard P. Schnitzler Jr. | 02/28/2017 21:48:01.771 | 2,222.00 | 7467 | Gouch | wilson | The Wilson 14 point fund Fund |
| 362 | Mr. Richard P. Schnitzler Jr. | 02/27/2017 16:26:10.851 | 200.00 | | Great I | wilson | The Wilson 14 point fund Fund |
| 362 | Mr. Richard P. Schnitzler Jr. | 02/23/2017 16:44:02.031 | 3,333.33 | 134 | Alaska | wilson | The Wilson 14 point fund Fund |
| 362 | Mr. Richard P. Schnitzler Jr. | 02/23/2017 16:09:20.381 | 1.00 | 134 | Alaska | wilson | The Wilson 14 point fund Fund |
| 362 | Mr. Richard P. Schnitzler Jr. | 02/23/2017 15:28:43.701 | 800.00 | 2796 | The N | gram | wilson The Wilson 14 point fund Fund |
| 362 | Mr. Richard P. Schnitzler Jr. | 02/15/2017 16:20:13.861 | 375.00 | 2796 | The N | gram | adam00 The Adams Family Fund |
| 362 | Mr. Richard P. Schnitzler Jr. | 02/15/2017 14:20:26.481 | 50.00 | 1499 | abcde | defgh40abcde | wilson The Wilson 14 point fund Fund |
| 362 | Mr. Richard P. Schnitzler Jr. | 02/15/2017 14:15:22.551 | 900.00 | 2716 | New H | d | wilson The Wilson 14 point fund Fund |
| 362 | Mr. Richard P. Schnitzler Jr. | 02/09/2017 17:23:55.001 | 300.00 | 230285 | CHRIS | A NEW JERSEY | wilson The Wilson 14 point fund Fund |

Create Applications pop-up

- Users can retrieve additional new suggestions from **DonorCentral** or open up the **Field Mapping** utility on the processes tab.
- **Suggestion Field Mapping** utility has also been added to the **Tools > System Options > DonorCentral** menu. The **DonorCentral** menu has been rearranged so periodic activities show up in the first section and typically one time configuration is in the second section.

Updated DonorCentral Menu

| |
|---------------------------------------------|
| DonorCentral Options |
| DonorCentral Export |
| Retrieve Suggestions from DonorCentral |
| Crystal Fund Statements Export |
| Upload DC Fund Statements |
| DonorCentral Suggestion Field Mapping |
| Setup DonorCentral Upload |
| Setup Documents for Advisor Fund Statements |
| SuggestionCentral Code Maintenance |
| DonorCentral Database Overrides |
| DonorCentral Help Online |

Other Enhancements

| ID | Module | Description |
|-------|--------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 7078 | AP | Added Find Record to Accounts Payable > Reconciliation > Transactions tab . |
| 12141 | Grant | <p>Anonymous Check Box on Application > Contact Tab > Advisor section has been enabled for everyone. Prior to 14.41 it was only enabled if the DonorCentral Option ASSIGN_ANONYMOUS_DONOR_IDCODE was true.</p> <p>Some clients have built their grant and check letter templates with the logic that uses a blank Advisor ID Code and Name to indicate donor anonymity. Such logic prevents the foundation from recording in the standard FIMS field who recommended the non-competitive grant, which makes it difficult to send cc letters to the donor.</p> <p>Clients should review and verify in Test & Learn how donor anonymity is handled on their grant and check letters before filling in Advisor ID Code and Name</p> |

FIMS 14.41: 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 |
|--------|------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 17778 | FACTS | Fixed rounding issues with Begin of Day flag when setting on transactions for funds that were not being closed. Also removed Close a Fund . This is due to data corruption caused when used improperly. If this a function that is used by your foundation then it can be added to the custom menu. |
| 7065 | FACTS | Fixed issue filtering data grids by Investment Account Code |
| 372403 | FIMS CRM | Fixed issue not logging errors when Profiles not Syncing to FIMS CRM due to invalid data. |
| 377059 | Profile | Profile Address Maintenance utility was not updating address for Open AP Items used to print checks. This has been fixed. |
| 16988 | Inter-Fund | Added back ability to set Inter-Fund Flag for Gifts and Grants in Global Change Program. |
| 375388 | Profile | Profile Affiliation records could not be deleted when DonorCentral Real Time Sync is enabled for Grantees with no Grantee Contact Person assigned or in 14.40 no Grantee Status Code assigned. This has been fixed. |