# FIMS 14.62 Release Notes

This document contains brief summaries for issues resolved in the FIMS version 14.62 patch release dated **August 25th, 2018**.

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## Upgrade Overview

**Host*Net** clients will be upgraded to 14.62 on August 25th, 2018 during scheduled maintenance downtime.

**On Premise** clients on version 14.60 or 14.61 can update to 14.62 by downloading the installation package from Blackbaud Downloads ( https://www.blackbaud.com/support/downloads/downloads.aspx), and following the installation instructions in the **FIMS Upgrade Guide**.

**Note:** Single-user FIMS clients cannot use the patch update. Contact Support for a full installation.

## Blackbaud Customer Support

**Need Help?**

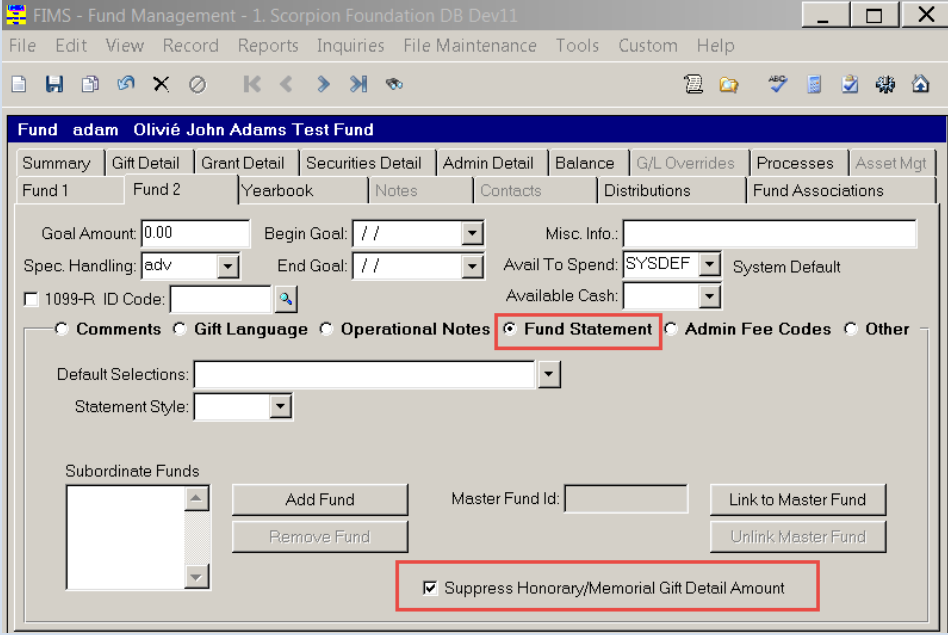If you have questions or need assistance, please contact Support.

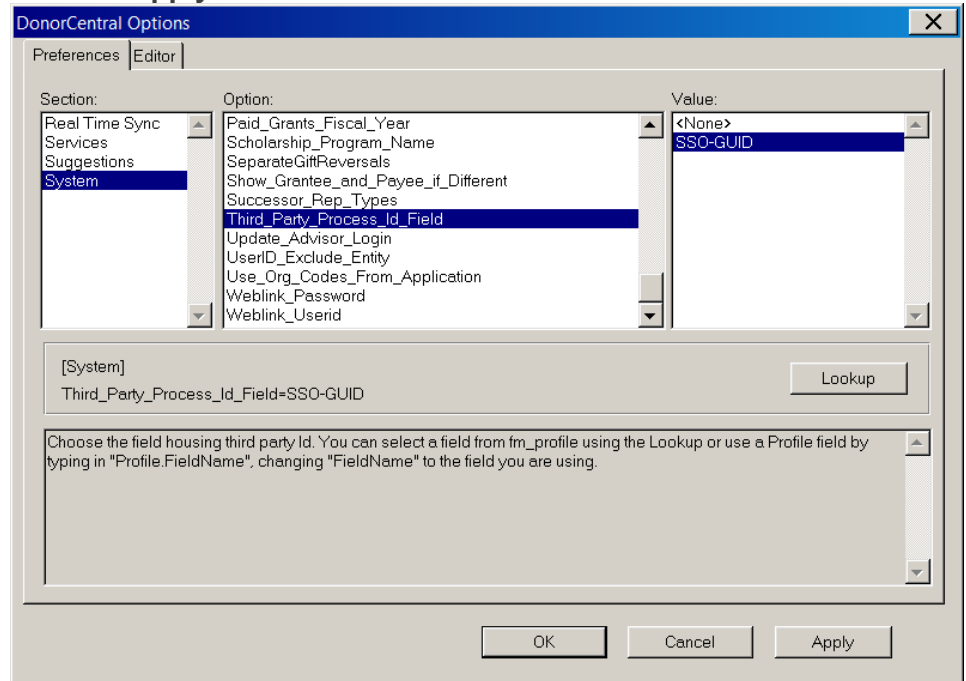| | |
|---|---|
| **Online:** | Visit Case Central at https://www.blackbaud.com/casecentral/casesearch.aspx. Click the **Case** tab at the top and click **Create New Case**. |
| **Phone:** | (800) 256-7772 |
| **Support Hours:** | M-F, 8:30 am – 8:00 pm ET |

## Minor Enhancements

The following enhancements were added to this release.

| ID | Module | Description |
|---|---|---|
| **968029** | DonorCentral NXT | You can now choose to hide the value of Honor and Memorial gifts when viewed individually. When enabled, the total value still includes all gift amounts.<br><br>To hide individual Honorary or Memorial Gifts:<br><br>1. Go to **Funds > Fund 2** tab.<br>2. Select the **Fund Statement** option.<br>3. Check the **Suppress Honorary Memorial Gift Detail Amount** option.<br>4. Click the **Save** icon in the upper-left corner.<br><br> |
| **993525** | DonorCentral NXT | Previously, Foundations could have a Profile Fieldmaker field, **fm_Profile**, with the SSO or third-party ID information *for advisors* but couldn't identify the value when exporting to DonorCentral NXT.<br><br>Now, in **DonorCentral Options**, a new option, **Third_Party_process_Id_Field** is available so you can export and identify GUIDs that exist on a Fieldmaker field when exporting advisor data to DonorCentral NXT.<br><br>To include the profile Fieldmaker field in the advisor record export: |

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| | | 1. Go to **Tools > System Utilities > DonorCentral > DonorCentral Options**.<br>2. In the **Section** field, select **System**.<br>3. In the **Option** field, select **Third_Party_process_Id_Field**.<br>4. In the **Value** field, choose the existing profile Fieldmaker field to create a cross-reference.<br>5. (*Optional*) Click **Lookup** to change the value selection.<br>6. Click **Apply** or **Ok**.<br><br> |
| **999421** | DonorCentral NXT | In **DonorCentral Suggestion Field Mapping**, columns are now resizable so you can see content at a glance.<br><br>To resize columns:<br><br>7. Go to **Tools > System Utilities > DonorCentral > DonorCentral Suggestion Field Mapping**.<br>8. In the header column, mouse over the vertical borders to stretch or shorten a column width.<br><br> |

| 996766 | Fund Asset Management | When viewing funds in Funds and General Ledger, you can now hide rows with zero value, so you can more easily see the rows that have a monetary value. This feature is available for both Progress 10 and 11.<br><br>To hide zero value rows in Funds or General Ledger:<br>1. Open the fund information:<br>    • In **Funds**, click the **Asset Mgt** tab.<br>    • In **General Ledger**, click **Asset Rebalancing > Fund Targets** tab.<br>2. Choose one of the following options:<br>    • **Show All Rows** – shows all rows<br>    • **Only Rows with Values** – hides rows with a zero value<br><br> |
|---|---|---|
| 1002420 | Profile | The Run Watchlist Check feature now works with Progress 11.<br><br>To run the check:<br>1. In **Profile**, click the gear icon on the left-hand side.<br>2. Select **Run Watchlist Check.**<br>3. Click **OK**. |
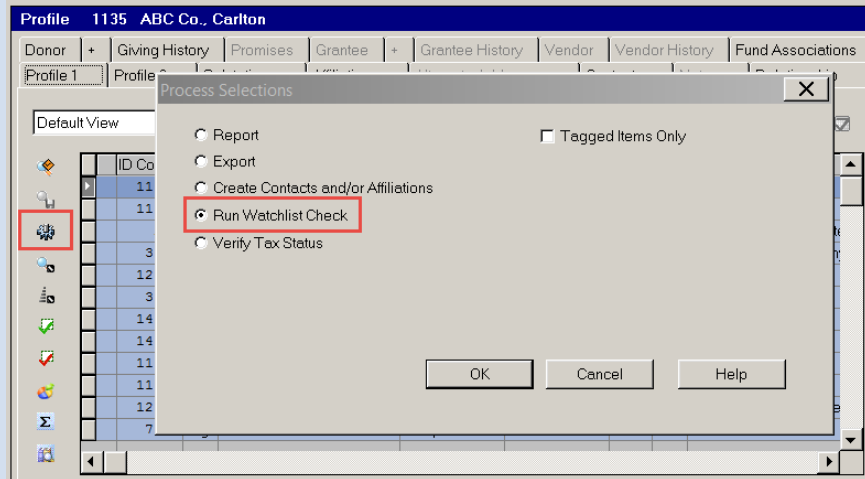
4. On the **Check Watchlist for Reported ID Codes** window, check the **ID Code** box and click **OK**.
5. With the results, you can **Create Contacts** or **View Report**.
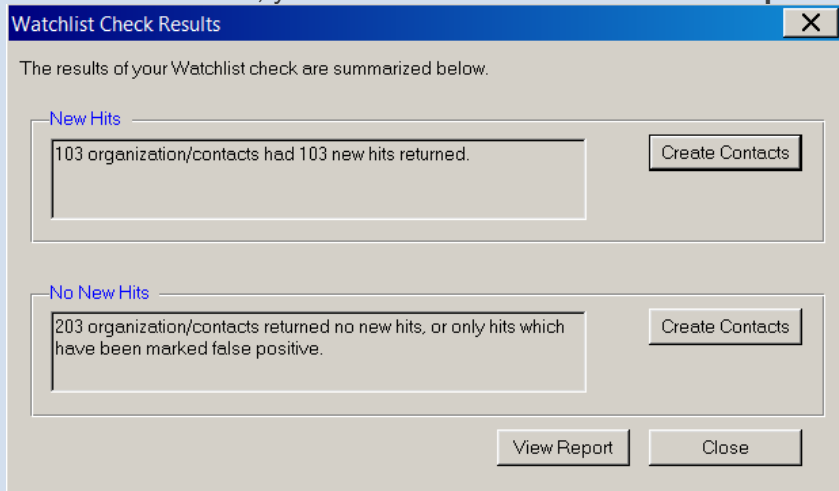


| | Reports | In the Users Connected Listing, the **Device** (computer name) column was widened so you can see more characters of a long device name. |
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## Resolved Issues

The following issues are resolved in this release. We've provided case numbers for internal referencing.

| ID | Module | Description |
|---|---|---|
| 994630 | Crystal Reports | For Progress 11, Crystal Reports Viewer now passes credentials to subreports. |
| 1001869 | Crystal Reports | For Progress 11, Crystal Reports Viewer now prompts for parameters. |
| 915293 | DonorCentral NXT | When importing grants using **DonorCentral NXT Suggestion Import**, the **Donor Advisor Email** is now populated. |
| 953667 | DonorCentral NXT | When importing grants using **DonorCentral NXT Suggestion Import**, ACH details now populate correctly. |
| 1001412 | DonorCentral NXT | DonorCentral NXT now checks the "UnusedAddressBlock" column and displays the donor address according to the FIMS setting. |
| 1020893 | DonorCentral NXT and Progess 11 | When creating an application from an imported suggestion from DonorCentral NXT after an upgrade to Progress 11, the error, "You may not compile programs that update the database in this version," no longer occurs. |
| 914864 | FACTS | When printing the **FACTS > Reconciliation > Processes > Account Reconciliation Report**, the date no longer wraps on the page. |
| 945023 | FACTS | In FACTS, the **Unitization** and **Unitization History Reports** no longer wrap numbers when printed as seen in FIMS version 14.60. |
| 1006988 | FIMS and Progress 11 | Upon FIMS startup with Progress 11, errors related to the Progress 11.6 prox.dll no longer occur. |
| 992265 | FIMS CRM Sync | For the FIMS CRM Sync, the fund name is now limited to 80 characters to match the limit set by Salesforce. |
| 965581 | General Ledger | When running the Fund Statement Designer, the description now displays when the column is added into the Admin Detail section. |
| 1006273 \| 998061 | Grants | When using Real-time sync, adjusting a Grant in FIMS no longer causes a "marksuggestionasprocessed" error. |

| ID | Module | Description |
|---|---|---|
| **934607** | Grant Import | When importing grants from Grantmaking (Gifts Online), the Grant Import now handles encoded characters and line breaks, no longer causing the "The value is too large for the field," error. |
| **962020** | Graphical Viewer | When running fund statements through Graphical Viewer after a 14.60 upgrade, the viewer is no longer blank. |
| **954854** | Reports | In **Fund Statement Export > Export To** tab, the **Browse** button for **Securities Detail** now works. |
| **979694** | Reports | For on premise customers, the List Funds within a Pool report now works as expected in Query Only Progress. |
| **991810** | | On Host*Net, SQL Views and Widths Checker, we now support ODBC_PORT like the ODBC 92 Configuration. |
| **1006988** | | The Contact screen now allows unposted applications to be entered. |