

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 (<u>https://www.blackbaud.com/support/downloads/downloads.aspx</u>), 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 <u>https://www.blackbaud.com/casecentral/casesearch.aspx</u>. 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

ID	Module	Description
968029	DonorCentral	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. To hide individual Honorary or Memorial Gifts: 1. Go to Funds > Fund 2 tab. 2. Select the Fund Statement option. 3. Check the Suppress Honorary Memorial Gift Detail Amount option. 4. Click the Save icon in the upper-left corner. Fine Edit View Record Reports Inquires File Maintenance Tools Custom Help Fine Edit View Record Reports Inquires File Maintenance Tools Custom Help Find Adams Test Fund Summary Git Detail Green Detail Securities Detail Admin Detail Belance Git. Overrides Processes Asset Mathematical System Details Good Amount, 000 Begin Gool 77 Avail To Spend SySDEF System Default 1993-R ID Code Compared Coperational Notes Fund Statement Admin Fee Codes Other Bedin Statement Syle Statement Syle St
993525	DonorCentral NXT	 Previously, Foundations could have a Profile Fieldmaker field, fm_Profile, with the SSO or third-party ID information <i>for advisors</i> but couldn't identify the value when exporting to DonorCentral NXT. 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. To include the profile Fieldmaker field in the advisor record export:

The following enhancements were added to this release.

		 Go to Tools > System Utilities > DonorCentral > DonorCentral Options. In the Section field, select System. In the Option field, select Third_Party_process_Id_Field. In the Value field, choose the existing profile Fieldmaker field to create a cross-reference. (Optional) Click Lookup to change the value selection. Click Apply or Ok. Preferences Editor Preferences Schort FisceLYeer Services Editor Separate Giffeverals Successor_Rep_Types None> Update Arkisor_Login None> System Successor_Rep_Types Update Arkisor_Login Successor_Rep_Types Update Arkisor_Login Lookup Update Arkisor_Login Successor_Rep_Types Update Arkisor_Login Update Arkisor_Login Update Arkisor_Login Lookup Update Arkisor_Login Update Arkisor_Login Update Arkisor_Login Lookup Update Arkisor_Login Lookup </th
999421	DonorCentral NXT	In DonorCentral Suggestion Field Mapping, columns are now resizable so you can see content at a glance. To resize columns: 7. Go to Tools > System Utilities > DonorCentral > DonorCentral Suggestion Field Mapping. 8. In the header column, mouse over the vertical borders to stretch or shorten a column width. <u>FIMS - DonorCentral Suggestion Field Mapping</u> <u>• Form C Unmapped © System C All</u> <u>• Form C C C C C C C C C C C C C C C C C C C</u>

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. To hide zero value rows in Funds or General Ledger: Open the fund information: In Funds, click the Asset Mgt tab. In General Ledger, click Asset Rebalancing > Fund Targets tab. Choose one of the following options: Show All Rows – shows all rows Only Rows with Values – hides rows with a zero value
		Fund adam Olivié John Adams Test Fund Fund 1 Fund 2 Yearbook Notes Contacts Distributions Fund Associations Summary Gift Detail Grant Detail Securities Detail Admin Detail Balance G/L Overrides Processes Asset Mgt Year: 2018 Period: 12 Strategy: Aggressive Aggressive Growth Sweep Clearing Distribution Type: Target % © Show All Rows © Only Rows with Values Account GL Acct. Description GL Balance Current % Target % Fixed \$ Distribution % 11000 Checking - Sweep 160.362.00 25.39% 0.00% 0.00 0.00% 14000 Assets in Pool A (Equity) 343.594.96 56.54% 0.00% 0.00 0.00% 14100 Assets in Fixed Pool B 103.716.23 17.07% 0.00% 0.00 0.00% Using a ? in the Fixed \$ Column will allow a pool to be skipped. Total GL Balance for Pools: 607,673.19 Clear Targets Build Targets Strategy Total FACTS Market 607,673.19 Build Targets
1002420	Profile	 The <u>Run Watchlist Check</u> feature now works with Progress 11. To run the check: In Profile, click the gear icon on the left-hand side. Select Run Watchlist Check. Click OK.

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Reports	In the <u>Users Connected Listing</u> , the Device (computer name) column was widened so you can see more characters of a long device name.

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 <u>Graphical Viewer</u> 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.