

FIMS 14.65 Upgrade Guide

Overview

This document provides details on the process of upgrading a local, on-premise Foundation Information Management System (FIMS) installation to the latest version using a .exe file.

Clients on FIMS version 12.5 or higher can download the installation package from [Blackbaud Downloads](https://www.blackbaud.com/support/downloads/downloads.aspx) (<https://www.blackbaud.com/support/downloads/downloads.aspx>), and follow the instructions in this document.

Upgrade Notes

About 14.65

FIMS 14.65 is a full release. You must be on version 12.50 or later to upgrade to 14.65.

IMPORTANT: The FIMS 14.64 patch and 14.65 release both contain a **required security certificate update** for FIMS clients who use **DonorCentral v2 or v4 with Progress 11**. To get the required certificate, install either the 14.64 patch or 14.65 release **by November 4th, 2018**.

If you've already installed the 14.64 patch, you have the required certificate and can upgrade to 14.65 at your convenience.

If you use Progress 11 and are on DonorCentral v2 or v4 and do not upgrade by November 4th, FIMS will be unable to connect to DonorCentral. This means you will be unable to pull suggestions from or upload Fund Statements. The required security certificate to keep FIMS and DonorCentral v2 or v4 connected is automatically installed when you upgrade to FIMS Version 14.64 or 14.65.

Progress Database

FIMS version 14.65 supports OpenEdge Progress version 10b, and version 11.6 and later. Check your Progress version in FIMS by clicking **Help > About FIMS**. Contact Support for any assistance needed with upgrading Progress.

Current IGAM Users

If your IGAM version is older than IGAM 5.5, do not perform the upgrade. Contact Support to schedule an IGAM update at (800) 256-7772.

Compatibility Notes

Microsoft Windows Operating Systems

- Workstations must have Microsoft Windows 7, 8, or 10 installed. Windows 10 is recommended.
- Servers must have Microsoft Windows Server 2008 R2 or later installed. We recommend using Microsoft Windows 2012 or later. Microsoft Windows Server 2016 is supported.
- **Windows 8/8.1 users:** Please note that FIMS is not certified for touch-screen functionality. If you notice any issues, please disable the touch-screen feature when using FIMS.
- **FIMS CRM users:** You may be required to co-install Progress 11 for compatibility with some graphical reporting features. Please contact FIMS Support for more details.
- **DonorCentral users:** Your FIMS server must have Microsoft Windows Server 2008 or later to upload data to DonorCentral.
- **IGAM users:** IGAM 3 is not compatible with Windows 7 or later. If you are currently using IGAM 3 for FIMS and want to use Windows 7, you must upgrade to IGAM 5 or later. Please contact Blackbaud Support for more information.

Crystal Reports

If you use Crystal Reports, note that reports written in Crystal Reports earlier than version 9.0 cannot connect to Progress 10.x databases.

If you have reports written in an earlier version of Crystal, you must upgrade to Crystal 10 or higher and convert your reports to use them with FIMS version 14.x.

FIMS version 14.60 and later with Progress OpenEdge version 11 requires an upgrade to Crystal version 13. See the [14.60 Release notes](#) for information.

OS

OS updates are not automatically certified but are supported when the OS vendor guarantees backwards compatibility with the baseline OS level. Certification of OS updates may be performed if the backwards guarantee compatibility of the OS Service Pack / Maintenance Pack is questionable.

Microsoft Office

Office 365 users, please note that only a desktop installation of **Office 2007/2010/2013/2016** connected to Office 365 is fully compatible.

Support

Need Help or Have Questions?

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

Support Hours: M-F, 8:30 am – 8:00 pm ET

Phone: (800) 468-8996, option 1

1. **Online:** Visit Case Central at <https://www.blackbaud.com/casecentral/casesearch.aspx>. Click the **Case** tab at the top and click **Create New Case**.

Upgrading FIMS

Before beginning, ensure all users are logged off, and all instances of FIMS are closed, meaning that FIMS is not open on any machine. The database, however, must be running.

Please see the following Prep Guide that may help avoid common upgrade issues:

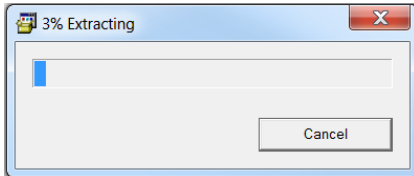
<https://kb.blackbaud.com/articles/Article/117534>

Note: Version 14.65 is a full upgrade, not a patch. The upgrade must run on the FIMS database server, not a workstation.

1. On the FIMS database server (not workstation), double-click the **FIMS1465.exe** file to begin the installation.

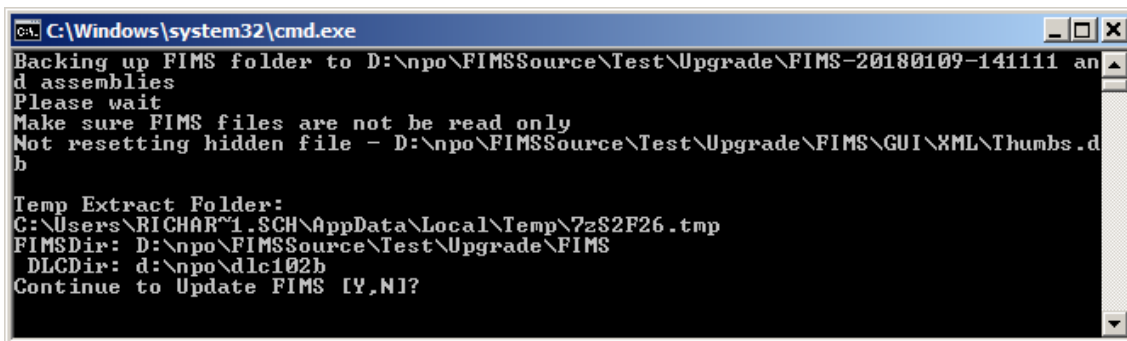
Tip: If your browser or operating system ask whether you want to continue, choose to agree.

2. Click **Yes** to continue.



The automated installer runs and performs the following actions:

- a. Determines the last FIMS folder used
- b. Determines the last DLS folder used
- c. Backs up the FIMS folder
- d. Removes the Read Only attribute in existing FIMS files



```
C:\Windows\system32\cmd.exe
Backing up FIMS folder to D:\npo\FIMSSource\Test\Upgrade\FIMS-20180109-141111 and
assemblies
Please wait
Make sure FIMS files are not be read only
Not resetting hidden file - D:\npo\FIMSSource\Test\Upgrade\FIMS\GUI\XML\Thumbs.d
b
Temp Extract Folder:
C:\Users\RICHAR~1\SCH\AppData\Local\Temp\7zS2F26.tmp
FIMSDir: D:\npo\FIMSSource\Test\Upgrade\FIMS
DLCDir: d:\npo\dlc102b
Continue to Update FIMS [Y,N]?
```

3. When prompted, choose **Y** to continue.
4. After the files finish copying, the FIMS Database Selection window displays. Click on the database you want to update and click **Select**.
5. When the screen prompt displays, press a key to continue. The program closes the window and deletes the temp folder.

```

C:\Windows\system32\cmd.exe
Backing up FIMS folder to D:\npo\FIMSSource\Test\Upgrade\FIMS-20180109-141111 and
d assemblies
Please wait
Make sure FIMS files are not be read only
Not resetting hidden file - D:\npo\FIMSSource\Test\Upgrade\FIMS\GUI\XML\Thumbs.d
b

Temp Extract Folder:
C:\Users\RICHAR~1.SCH\AppData\Local\Temp\7zS2F26.tmp
FIMSDir: D:\npo\FIMSSource\Test\Upgrade\FIMS
DLCDir: d:\npo\dlc102b
Continue to Update FIMS [Y,N]?Y
Copying files to D:\npo\FIMSSource\Test\Upgrade\FIMS

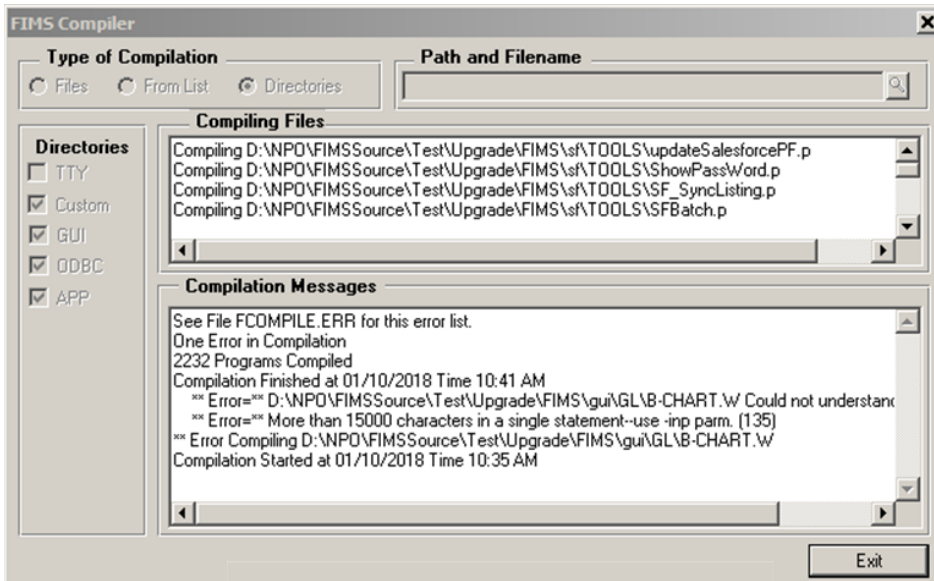
Change Directory From:
C:\Users\RICHAR~1.SCH\AppData\Local\Temp\7zS2F26.tmp
To:
D:\NPO\FIMSSource\Test\Upgrade\FIMS
Updating Assemblies
Assemblies Copied

Update FIMS
FIMSDir D:\npo\FIMSSource\Test\Upgrade\FIMS
DLCDir d:\npo\dlc102b
Press any key to continue . . .

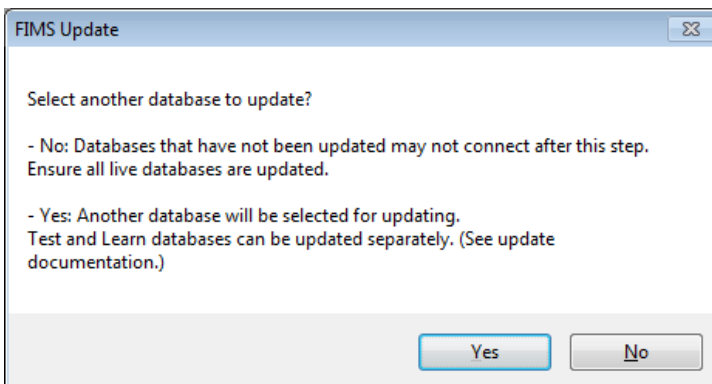
```

Depending on the size of your database, the update process may take some time to complete.

- On the FIMS Compiler window, click **Exit**.



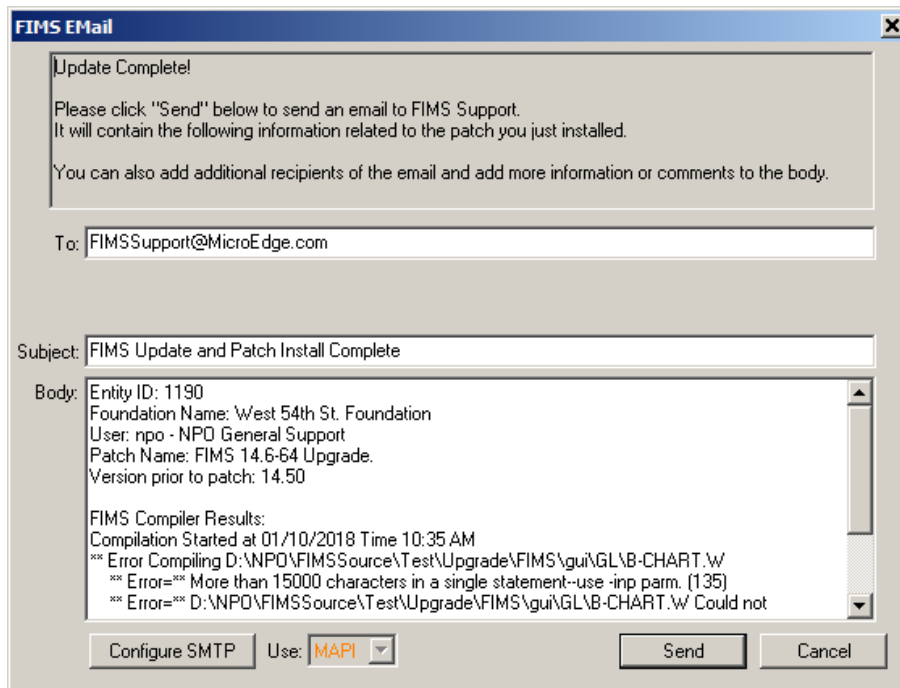
- If you have multiple databases, the screen below displays. Click **Yes** to go back to repeat the above steps so you can choose the next database to update.



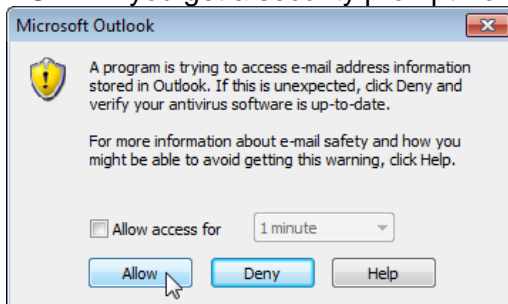
NOTE: Choosing **No** may require FIMS Support to update the other databases in the future.

8. When the "Update Complete!" screen displays, the upgrade is complete, and you can click **Cancel** to finish.

NOTE: FIMSSupport@MicroEdge.com is no longer monitored. If you encounter issues during upgrade, call FIMS Support at 1-800-256-7772 or create a case on Blackbaud.com in Case Central.

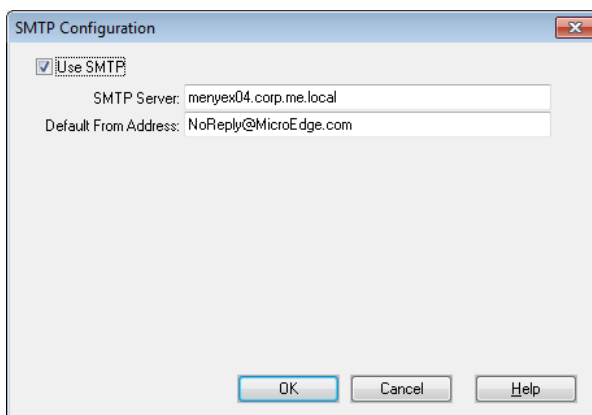


NOTE: If you get a security prompt from Microsoft Outlook, click **Allow** twice.



Configure SMTP

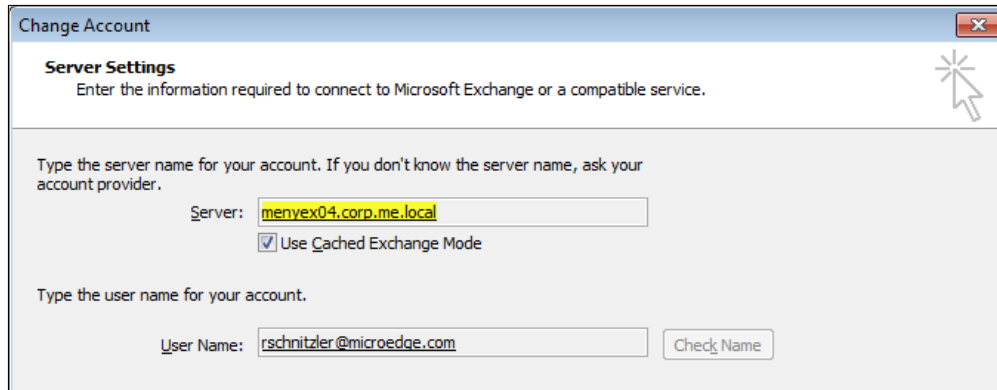
Click **Configure SMTP** and enter the **SMTP Server** and a **Default From Address**.



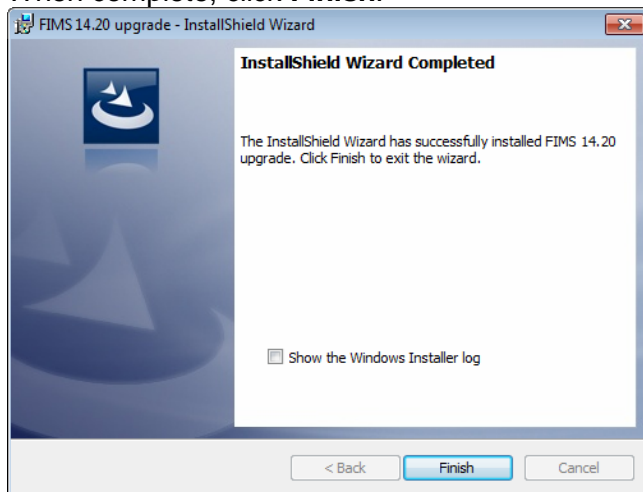
If you do not know your SMTP Server, you can go into Mail Account Settings through your Email Client or through Control Panel and then click on **Change Account**.

The information in the Server field will be your SMTP Client.

Make sure to click **Cancel** when done.



9. When complete, click **Finish**.



Updating Test & Learn Databases - Updated November 14, 2018

Note: Do not stop your live or demo database before doing this task.

The live database *must be running* to complete the **Copy Live to Demo** task. The task automatically regulates the stopping and starting of the Demo database for you.

1. On the desktop of the FIMS database server, double-click the **Copy Live to Demo** icon.

Tip: If you don't have the icon, follow these instructions to create the task icon:

<https://kb.blackbaud.com/articles/Article/103103>

2. Type in **Y** and press Enter when prompted in the command window. A backup of the live database completes, then a list of files displays. The live database backup restores to Demo, then the Demo database restarts.