

FIMS 14.72 Release Notes

This document contains brief summaries for issues resolved in the FIMS version 14.72 release released on **March 17th, 2020**.

Table of Contents

Upgrade Overview	1
Blackbaud Customer Support	1
Major Enhancements.....	2
Minor Enhancements	9
Resolved Issues	11

Upgrade Overview

Host*Net clients will be upgraded to 14.72 on March 17th, 2020.

On Premise clients on FIMS version 14.71 can update to patch 14.72 by downloading the installation package from Blackbaud Downloads (<https://www.blackbaud.com/support/downloads/downloads.aspx>) and following the installation instructions in the **FIMS 14.72 Upgrade Guide**.

Notes for On-Premise clients:

FIMS versions 14.70, 14.71, and 14.72 support Progress OpenEdge 11.6.4 as the minimum-supported version.

When FIMS 14.71 or 14.72 is used with Progress 10, the newer DonorCentral NXT integration features and Gift Import will not work.

For information about upgrading to Progress 11.6.4 or later, see [Knowledgebase article 189200](#), or to learn about moving your data to Blackbaud’s hosted environment in Host*Net, contact Blackbaud.

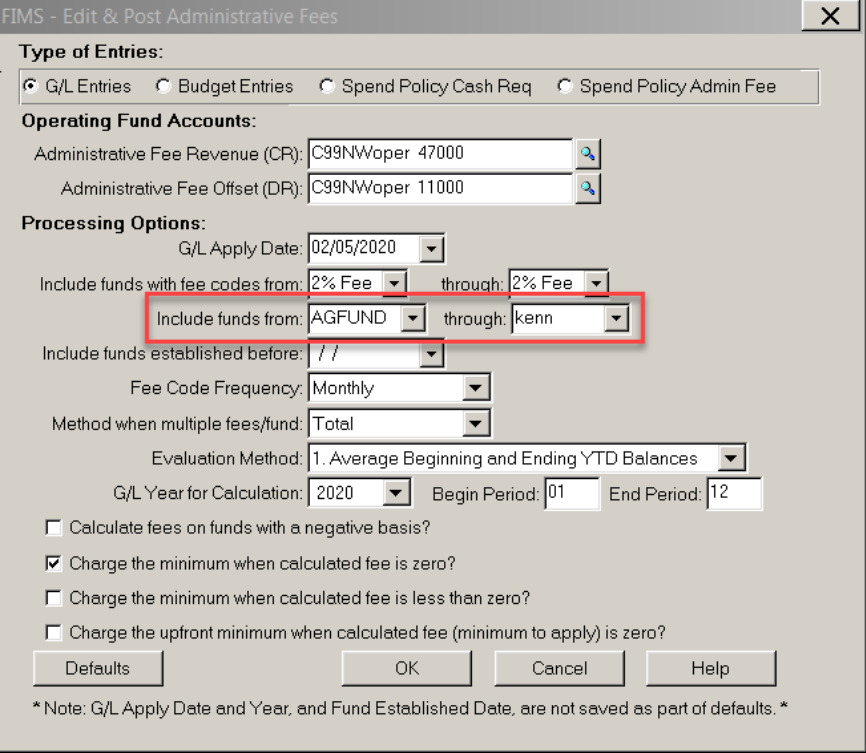
Blackbaud Customer Support

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) 468-8996, Option 1
- Support Hours:** M-F, 8:30 am – 8:00 pm ET

Major Enhancements

The following major enhancements are available in this release.

ID	Module	Description
907213	Funds	<p>Filter Administrative Fees search results using a Fund ID range</p> <p>In Administrative Fees, you can now filter results by searching on a range of Fund IDs.</p>  <p>The screenshot shows the 'FIMS - Edit & Post Administrative Fees' dialog box. Under 'Processing Options', the 'Include funds from' dropdown is set to 'AGFUND' and the 'through' dropdown is set to 'kenn'. These two dropdowns are highlighted with a red rectangular box.</p>
1075234	Contacts	<p>Autopopulate Profile Information</p> <p>On a Fund record, when adding a new contact from the Contacts tab, the fields autopopulate with values from the last open profile in the Profile module.</p>
1218450	Profiles	<p>Easily Copy a Profile Address as an Alternate Address</p> <p>Now you can easily copy an existing Profile 1 address as an Alternate Address on the Alt Address tab.</p>

To copy a Profile 1 address to be an Alternate Address:

1. On the **Profile 1** tab, click **Copy to Alt Addr** button.

The screenshot shows the 'Donor 1135 ABC Co., Carlton' profile page. The 'Profile 1' tab is active. A red box highlights the 'Copy to Alt Addr' button located in the bottom right corner of the profile form. The form contains various fields for donor information, including name, organization, address, and contact details.

2. Choose which fields to move.

The screenshot shows the 'Copy to Alt Address Field Selection' dialog box. The dialog box contains a list of fields with checkboxes to select which fields to copy to the alternate address. The fields are:

Field	Value	Selected
Organization Name	ABC Co.	<input checked="" type="checkbox"/>
Report Name	ABC Co.	<input checked="" type="checkbox"/>
Sort Name	ABC Co.	<input checked="" type="checkbox"/>
Address 1	209 M Street	<input checked="" type="checkbox"/>
Address 2		<input type="checkbox"/>
City	Litchfield	<input checked="" type="checkbox"/>
State	CT	<input checked="" type="checkbox"/>
Zip Code	06759	<input checked="" type="checkbox"/>
Country	USA	<input checked="" type="checkbox"/>
County Code		<input type="checkbox"/>
E-Mail Address	abcCo@email.com	<input checked="" type="checkbox"/>
Home Phone		<input checked="" type="checkbox"/>
Work Phone		<input type="checkbox"/>
Work Ext		<input type="checkbox"/>
Fax		<input type="checkbox"/>
Cell Phone		<input type="checkbox"/>
Allow Mail		<input checked="" type="checkbox"/>
Address Type	BUS1	<input checked="" type="checkbox"/>
Title Code	Pres	<input checked="" type="checkbox"/>
Title Descr	President	<input checked="" type="checkbox"/>

Buttons: OK, Cancel

3. Click **OK**.

Note: Users without write permissions in the **Alt Address** tab will see a permission denied message.

1250886

Data Grids

Add User Affiliations as a Profile Data Grid Column

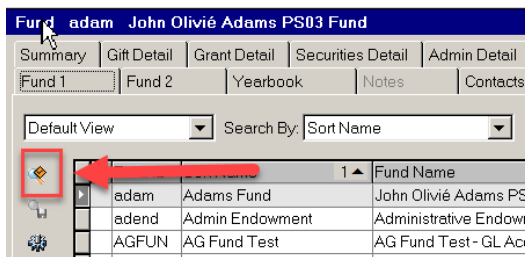
You can now view user **Affiliations** in any data grid when you add the **Affiliation** column.

Visibility to this field helps similarly to how the [User Defined Profile Export](#) tool provides understanding of what affiliations being filtered on cause a profile to display in the grid.

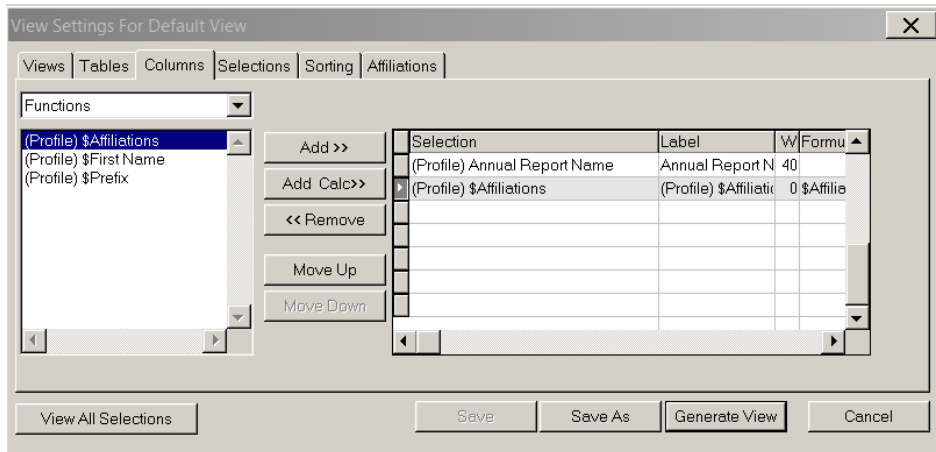
For details on using this feature, see [Knowledgebase article 193104](#).

To include an **Affiliation** column in the Profile data grid:

1. In any data grid, open **View Settings**.



2. In the **Columns** tab, choose **Functions** from the drop-down.
3. Select **(Profile) \$Affiliations**.



4. Click **Save As**.
5. Complete the fields and click **OK**.
6. Click **Save**.
7. In **Profiles**, select this saved data grid to see the **Affiliation** column.

1272992

'Drag and Drop' Gift and Grant Documents into the Documents Module

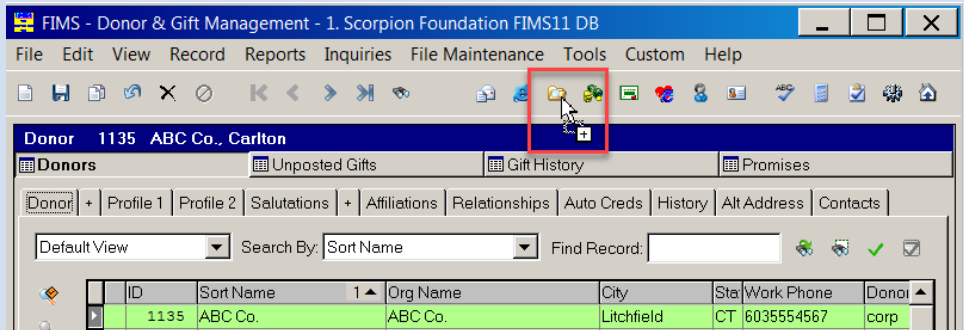
1277944
1273032

Document
Manager

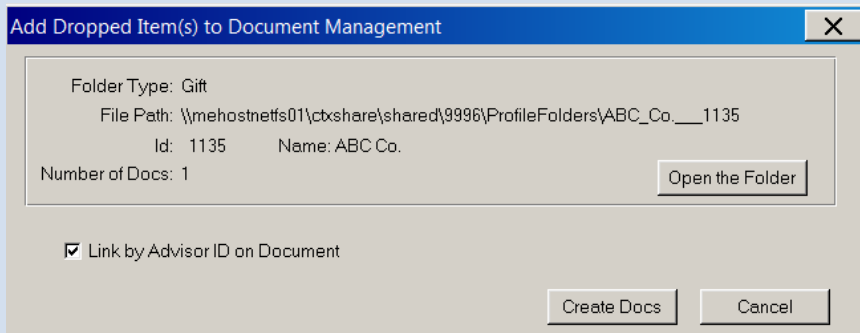
For Gift and Grant records, dragging files onto the folder button now displays a prompt to add the files to FIMS Document Management.

1. In **Gifts** or **Grants**, drag and drop a document to the folder button.

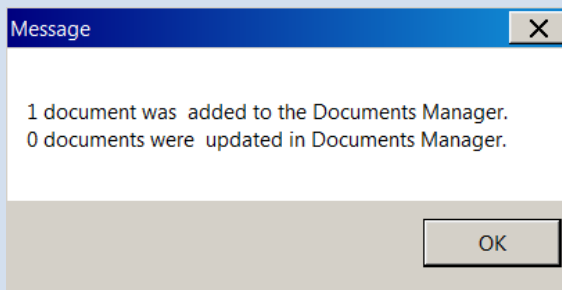
Note: On Host*Net, drag and drop works only from **Citrix My Files** folders.



2. Click **Create Docs** to add the document to the **Documents** module.



3. On the confirmation message, click **OK**.



4. You can now access the document in the **Gifts** or **Grants** module in which you dropped it, or in the **Documents** module (**View > Documents Module**).

<p>1286356 1286756 1286379 1286367 1286383</p>	<p>DonorCentral NXT Give to my Fund</p>	<p>Process DonorCentral NXT Online Gifts with the ‘Give to my Fund’ feature **COMING SOON**</p> <p>**Full support for this feature will be available after the next DonorCentral NXT release.**</p> <p>With the Give to my Fund feature, FIMS can retrieve direct debit (ACH) or credit card donations in DonorCentral NXT and process those gifts to a fund.</p> <p>This feature requires the use of Progress OpenEdge version 11 and Blackbaud Merchant Services.</p> <p>When this feature becomes available, see the DonorCentral NXT/FIMS Pro Features Integration Guide for more information.</p>
<p>1211356</p>	<p>Permissions</p>	<p>When security permissions are set in any module with context-sensitive menus, such as under File Maintenance or Reports, those same access permissions apply to all modules.</p> <p>If a user does not have permission rights in one module, those same rights apply across other modules.</p>
<p>1246868 1283412 1246872 1246871 1246873 1294802 1294804 1301847</p>	<p>System Updates for Extracts</p>	<p>Data Extract Improvements</p> <p>General Updates</p> <p>General updates were made to improve extracts of data in Tools > System Utilities > System Reports > Extract data for RE and/or FE Conversion.</p> <ul style="list-style-type: none"> - Embedded carriage returns in the FIMS to RE/FE data extract are now handled with a special character. - General NXT Extract now supports double quotes encapsulation. <p>Updates for Extract FIMS GL Transactions, Vendors, Bank and others</p> <ul style="list-style-type: none"> - A new Use Mapping File option allows mapping of the FIMS natural account, division code and account type to Financial Edge accounts. Choose to use an existing TXT file, create the file, or ignore the file.

To create the file, select the **Create Mapping File** option and click **OK**. If you do not yet have a Financial Edge Destination folder, the option attempts to create it for you.

The screenshot shows the 'FIMS - Extract Data for RE and/or FE Conversion' dialog box. It has a title bar with a close button. The main area contains several sections:

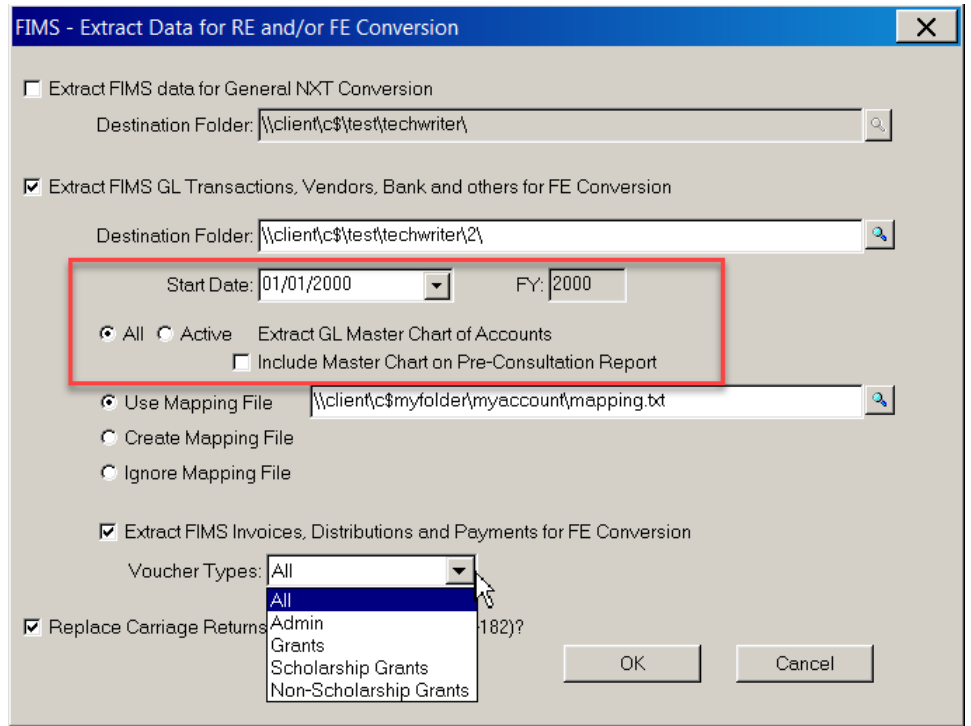
- Extract FIMS data for General NXT Conversion
Destination Folder: \\client\c\$\test\techwriter\
- Extract FIMS GL Transactions, Vendors, Bank and others for FE Conversion
Destination Folder: \\client\c\$\test\techwriter\2\
Start Date: 01/01/2000 FY: 2000
- All Active Extract GL Master Chart of Accounts
 Include Master Chart on Pre-Consultation Report
- Use Mapping File \\client\c\$\myfolder\myaccount\mapping.txt (highlighted with a red box)
 Create Mapping File
 Ignore Mapping File
- Extract FIMS Invoices, Distributions and Payments for FE Conversion
Voucher Types: All
- Replace Carriage Returns with Paragraph Mark (Alt-182)?

At the bottom right are 'OK' and 'Cancel' buttons.

- You can choose whether to **Extract FIMS Invoices, Distributions and Payments** in the extract from FIMS. Select the **Voucher Types** options to include in the extract.

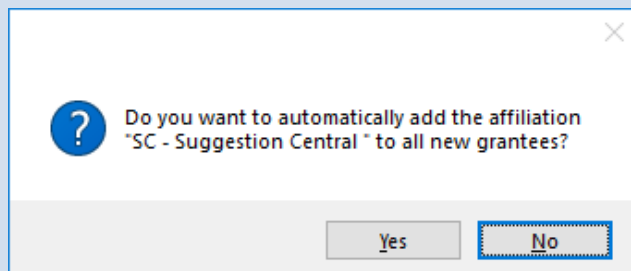
This screenshot is similar to the one above, but the 'Voucher Types' dropdown menu is open, showing a list of options: 'All', 'Admin', 'Grants', 'Scholarship Grants', and 'Non-Scholarship Grants'. The dropdown menu is highlighted with a red box. The 'Use Mapping File' option is also selected.

- More detailed information is available for Individual Vendor Contacts
- Record counts are added for AP Invoices & Payments, GL Journal Entries, Vendors, 1099 Vendors and more to the Pre-Consultation Report.
- The Fiscal Year (**FY**) and GL Chart are extracted in their own files. You can still optionally include the GL Chart on the Pre-Consultation Report.



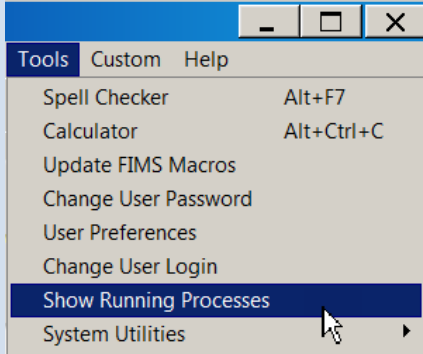
In **FIMS**, when creating a **Grantee Record** or **Application** from a submitted **DonorCentral NXT Grant Recommendation** that contains a new charity organization, an updated prompt now provides the option to add a **Suggestion Central Affiliation**.

1316763 DonorCentral
NXT



Minor Enhancements

The following minor enhancements were added in this release.

ID	Module	Description
1301777	System	You can now update the Profile Email in Import Record Updates .
1308030	Accounts Payable	Check Printing now waits until the OK button is clicked to warn the user when no check number or date is present instead of warning the user when leaving those fields.
1311300	System	<p>The Show Running Processes feature is now accessed directly under Tools. The report assists FIMS Support to determine what processes are in memory when intermittent FIMS issues occur.</p>  <p>The screenshot shows a 'Tools' menu with the following items: Spell Checker (Alt+F7), Calculator (Alt+Ctrl+C), Update FIMS Macros, Change User Password, User Preferences, Change User Login, Show Running Processes (highlighted), and System Utilities. A mouse cursor is pointing at the 'Show Running Processes' option.</p>
1325722	Accounts Payable	<p>Prior to this release, when a voucher was applied to a negative debit memo, an error in the Edit report prevented the debit memo from posting. Only Blackbaud Support could resolve the issue.</p> <p>Starting in this release, you can now remove negative, unapplied debit memos so you can post debit memos without the need for Blackbaud Support assistance.</p> <p>To remove negative, unapplied debit memos:</p> <ol style="list-style-type: none"> 1. In Accounts Payable, click the Open Items tab. 2. Open the negative debit memo. 3. Click Create Voucher. 4. Go to Item Entry > Open voucher > Process> Edit/post.

Also, in **Accounts Payable**, when you remove negative, unapplied debit memos from **Open Items**, the **AP Edit Report** displays a warning instead of an error.

Additional Information:

To compare **AP Payables** with **General Ledger Payables**, go to **Reports > General Ledger > Reconcile Subsidiary Modules with G/L**.

To examine negative, unapplied memos in your system, check **General Ledger**. If **General Ledger** is correct, delete the unposted journal entries instead of posting the journal entries to history.

Contact Blackbaud Services to ensure **FIMS** is set up optimally.

In the previous **FIMS** 14.71 release, an enhancement restricted the character length of the “Program Name” to ensure that the name would fit on a check. When the name was too long, a warning displayed.

In this release, we’ve added a new option so that you can choose whether to have the warning display. By default, long character name warnings are set to display.

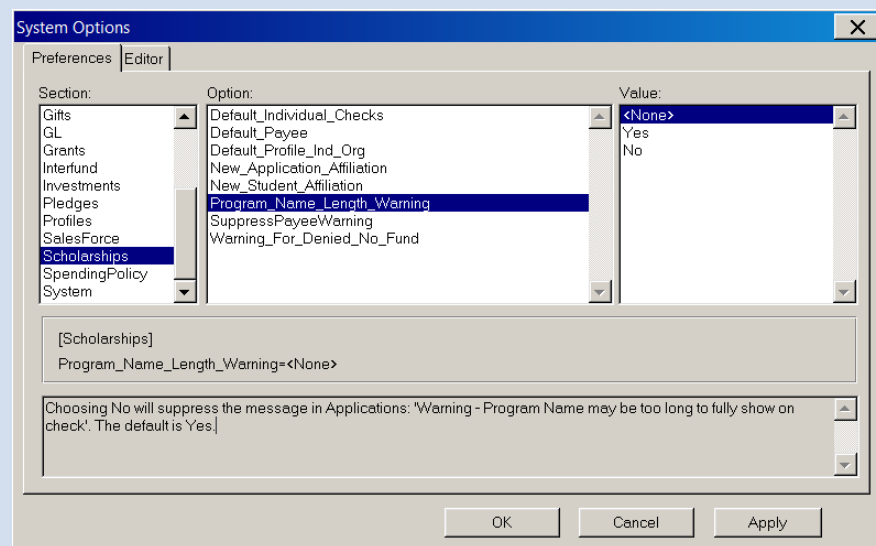
To turn the warnings off:

1. Go to **Tools > System Utilities > System Options**.
2. In **Section**, choose either **Grants** or **Scholarships**, depending on the module for which you want to turn off warnings.
3. In **Option**, choose **Program_Name_Length_Warning**.
4. Select a **Value** of **No**.

Note: Character restriction depends on how the check form is set up. Although you can disable the warning, character length remains restricted on the default non-DAF letter grant check forms.

1376439

Grants and Scholarships



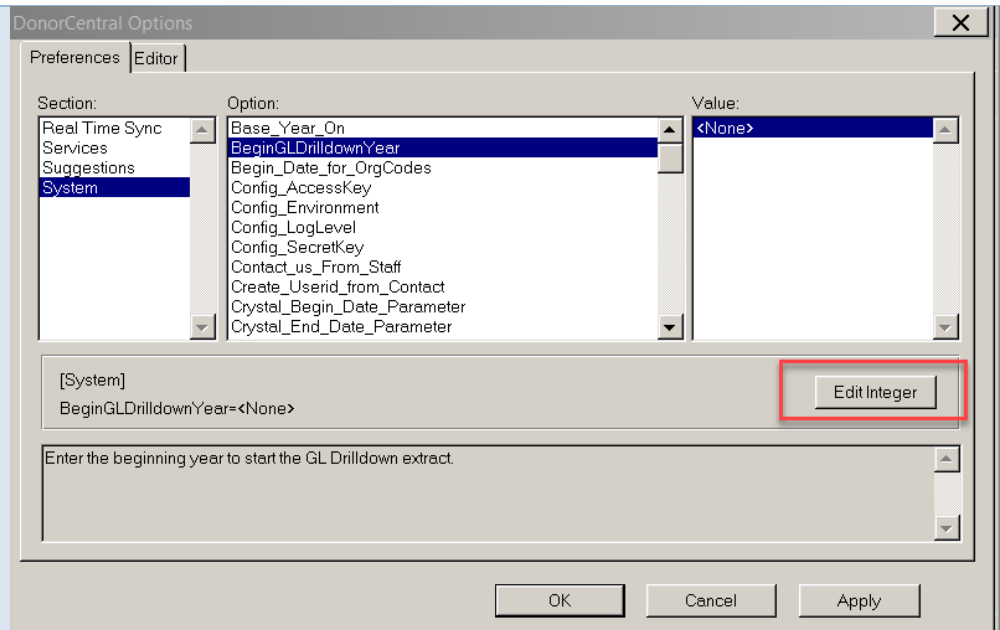
Resolved Issues

The following issues are resolved in this release. Case numbers are provided for internal referencing.

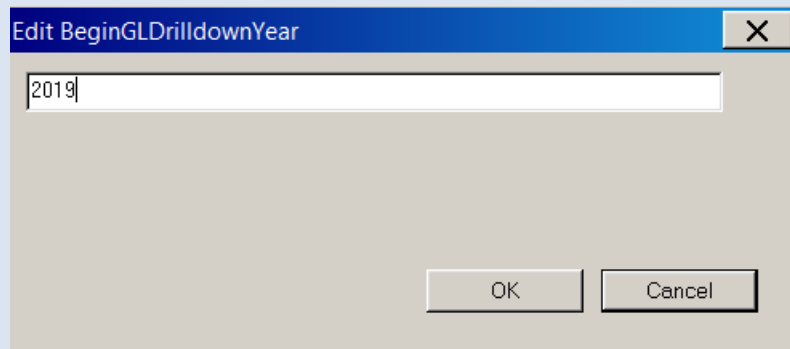
ID	Module	Description
1109783	Document Management	<p>With the Documents Module, you can now upload Adobe PDF and Microsoft Excel files for Donor Advisors and Funds.</p> <p>To provide this update, FIMS Word Macros now includes SaveGrantLettersFundIDPDF. You'll need to update FIMS Macros on workstations to complete this update.</p> <p>To update FIMS Macros on a workstation, in FIMS, go to Tools > Update FIMS Macros.</p> <p>Once the update is done, you can upload external PDF and Excel files using the Documents Module and place them in the appropriate FIMS Fund folder.</p>
1199787	Interfund	Interfund gifts that are marked as anonymous now display as anonymous on fund statements and the Fund Profile Report .
1211373	Grants	<p>When changing the Address in Tax Status Plus, FIMS now prompts you to choose whether you would like to move a previous address to an alternate address.</p> <p>To disable the prompt:</p> <ol style="list-style-type: none"> 1. Go to Tools > System Options. 2. Choose Profiles as the Section. 3. Choose the option, Copy_Previous_Address_To_Alternate_Address. 4. Select a Value of No to disable the prompts.
1222935	Grants / Accounts Payable	In Grants and Accounts Payable , the Invoice No. column width was increased to display up to 20 characters for the invoice number when you are viewing history, A/P Activity , Voucher and Voucher w/ Fund views.

Application 21500029 The Book Jam					
Grantees		Applications		Application History	
Application + Contact Prerequisites Payment Plan Notes Conditions A/P Activity Adjustments					
View By Voucher					
Voucher	Date Scheduled	Fund ID	Fund Name	Amount	Amount Due
2150002901	12/20/2016		The Mulvey Fund	1,000.00	0.00
Type	Number/ite	Invoice No.	Void/Unvoid Information		
Grant	2150002901/20/2016	21500029			
Payment	12596/30/2020	21500029			

1230139	DonorCentral NXT Real- Time Sync	Posting Gifts with multiple funds, where some go to DonorCentral NXT but others do not, no longer causes FIMS to close and reopen.
1230181	Accounts Payable	In Accounts Payable , changing line item amounts and clicking Save now also updates the Voucher total.
1238878	IGAM Import	<p>To address duplicate counties, updates were made to the county code table.</p> <p>Host*Net clients will no longer see duplicate counties after the 14.72 release.</p> <p>On-premise clients on the 14.72 patch will see duplicates removed. However, to prevent future duplicate counties, contact Blackbaud Support to do a full FIMS upgrade, or run <code>tools\upfims.p "compile"</code> after installing the 14.72 patch.</p>
1239165 1260193	Accounts Payable	In Accounts Payable Open Items , the Voucher description no longer overlays other fields when the window is enlarged.
1240313	DonorCentral	<p>To ensure that upload to DonorCentral is successful, the GL Drilldown / Activity Report now validates the year as a valid integer.</p> <p>To change the year value, a new Edit Integer button allows you to make corrections.</p> <p>To update the year:</p> <ol style="list-style-type: none"> Go to FIMS > Tools > System Utilities > DonorCentral > DonorCentral Options > System Section > BeginGLDrilldownYear.



2. Click **Edit Integer**, enter the four-digit year, then click **OK**.

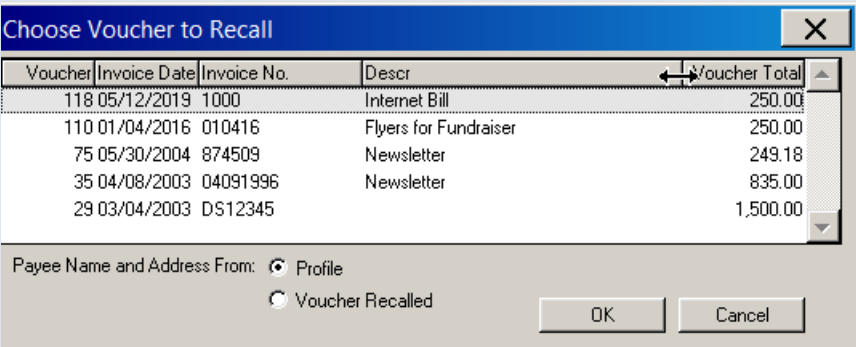


3. Click **OK** or **Apply**.

<p>1090490 1228095 854180 1175033 1258337 1253584</p>	<p>DonorCentral NXT Real- Time Sync</p>	<p>Improvements were made so that when gift reversals are made, the data syncs properly between FIMS and DonorCentral NXT.</p>
<p>1222937 1278016 1271826</p>	<p>Grants</p>	<p>When on the data grid in Grants, when you right-click a grantee, select Process Selections, and select Verify Tax Status, the information for NTEE, Org Name and Org Address now updates with data from the IRS instead of from the grantee tab.</p>
<p>1222329</p>	<p>Profiles</p>	<p>Combining two profiles now copies donor soft credit default information to the "copy to" profile as expected.</p>

1224957	DB Auditing	In Tools > System Utilities > Admin Utilities > Auditing Utilities , running the User Activity Audit Report on specific users now shows full usernames in the report results.
1230444	General Ledger	Graphical reports once again properly handle page breaks and double underlines from GL Design Statements .
1230488	Profiles	In FIMS , the spelling of the word, Profile , was corrected where misspelled.
1233983	System	To remove user names from FIMS , such as in the case as when an employee leaves, follow the instructions in this Knowledgebase article: https://kb.blackbaud.com/articles/Article/191605
1237761	Grants	Grantee correction can now be done on grants that are still in AP Open Items . Note: Fully paid grants still do not allow grantee correction.
1239576	Contacts	Clicking the Next button from the Profile or Fund Contacts tab no longer gives the error, "umeFocusDestroyed called for a browse cell."
1244589	FACTS	The FACTS module now instantly refreshes after data items are added.
1246872	System	Improvements were made related to data extraction out of FIMS : <ul style="list-style-type: none"> • A menu option was renamed to Tools > System Utilities > System Reports > Extract data for RE and/or FE Conversion: • In the System Integrity Report, choosing Fix Relationships no longer disables the Fix Fund Reqs.
1258346	Rebalancing	In Asset Rebalancing , the Offset Fund section now displays correctly for negative amounts correctly and properly handles billions.
1263411	DonorCentral NXT	For customers with multiple DonorCentral NXT tenants exist, organizations now upload properly.

		With this resolution, the error, “The data associated with your account is being refreshed. Please try again at a later time and thank you for your patience,” no longer displays when logging in to DonorCentral v4.
1276459	DonorCentral NXT	FIMS non-calendar FY clients who upload based on Calendar now have a beginning balance calculation that includes activity from the beginning of the fiscal year through 12/31. You’ll see this balance calculation in DonorCentral NXT , on the Fund page, Activity tab.
1282507	DonorCentral NXT	Grants that come from multiple funds and are still in Unposted AP no longer get the error, “*** No Grant Line Item record is available. (91)” for Real-Time Sync operations.
1286904	DonorCentral NXT	When a securities gift distribution is split into multiple funds, non-gift amounts are separated from the gift amounts for posted gift records. Negative, non-gift amounts now display in DonorCentral NXT . To clarify why an amount of \$0.00 may display on a gift record for a non-gift amount, Knowledgebase article 192429 was created.
1297747	System	The “Prox.dLL is being used by another process” warning message no longer displays for FIMS clients who start a second session of FIMS on the same workstation with Progress 11.7.
1308022	Grantee	Improvements were made in Grantee Profiles : <ul style="list-style-type: none"> - When deleting an Executive Profile, an improved message displays when the executive idcode is linked on a grantee record. The message now displays as, “Grantees exist with this Profile as Executive. Continuing to delete will clear out the Executive for those Grantees.” - When switching from the Grantee tab to the Profile tab, the following error no longer occurs: "Executive Profile does not exist. Please retry." - FIMS now checks for orphaned Grantee Executives in the System Integrity Report for Check Profiles.
1319123	Gifts	When using Gift Import with the From Profile option selected, the import tool now checks and imports the Alternate Address when that address includes

		dates that fall within the range of the gift date of the import for the creation of Gift Acknowledgement .
1325235	System	When importing profile records (Tools > System Utilities > Admin Utilities > Import Record Updates) to update many profiles in <i>FIMS</i> , you can now import more than 15 profile records.
1327345	Gifts	In Reports > Gifts > Gift History w/ Soft Credits > Run Report , when you use the File > Save As option to save the results, the columns now match the same columns that are visible in the <i>FIMS</i> window.
1325266	Accounts Payable	<p>The Choose Voucher to Recall window was updated to widen the Description column as well as make the columns resizable and movable.</p>  <p>You can see these changes in Accounts Payable > Item Entry tab > open a voucher > Voucher Recall button.</p>
1341658	Funds	In Funds , when adding a new profile to the fund association tab of a fund, an error describing a duplicate record no longer displays when no duplicate is detected.
1341800	Funds	<p>An issue was identified that causes the Fund Activity Report to contain no data in <i>DonorCentral NXT</i>.</p> <p>Knowledgebase Article 192491 describes the steps to correct the issue.</p>
1346217	System	In Host*Net, clicking Create, Update, or Save on the Setup DonorCentral Upload screen now updates the ini file.
1352825	Grants	An update was made in Grants > Grantee tab > Payee so that field labels display as expected in records with payee and ACH information.