

FIMS 14.73 Release Notes

This document contains brief summaries for issues resolved in the FIMS version 14.73 patch released on **September 30th, 2021**.

Patch 14.73 contains all updates since the 14.71 release.

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Upgrade Overview

Host*Net clients will be upgraded to 14.73 on September 30, 2021.

On Premise clients on FIMS version 14.71 or 14.72 can update to patch 14.73 by downloading the installation package from Blackbaud Downloads (<https://www.blackbaud.com/support/downloads/downloads.aspx>) and following the installation instructions in the **FIMS 14.73 Upgrade Guide**.

Note: **On Premise must be on at least FIMS 14.71 to install patch 14.73.** If you are not on at least FIMS 14.71 then you must first install the full 14.71 FIMS version available on the [Blackbaud Downloads page](#).

Notes for On-Premise clients:

FIMS versions 14.70 and above require Progress OpenEdge 11.6.4 as the minimum-supported version.

For information about upgrading to Progress 11.6.4 or later, see [Knowledgebase article 189200](#). 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.

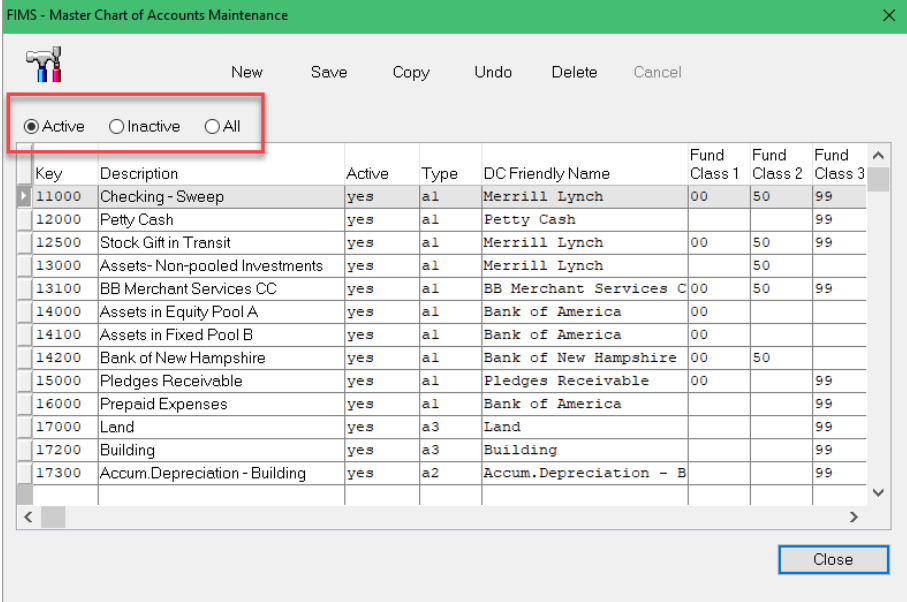
Online: Visit Case Central at <https://www.blackbaud.com/casecentral/casesearch.aspx>.

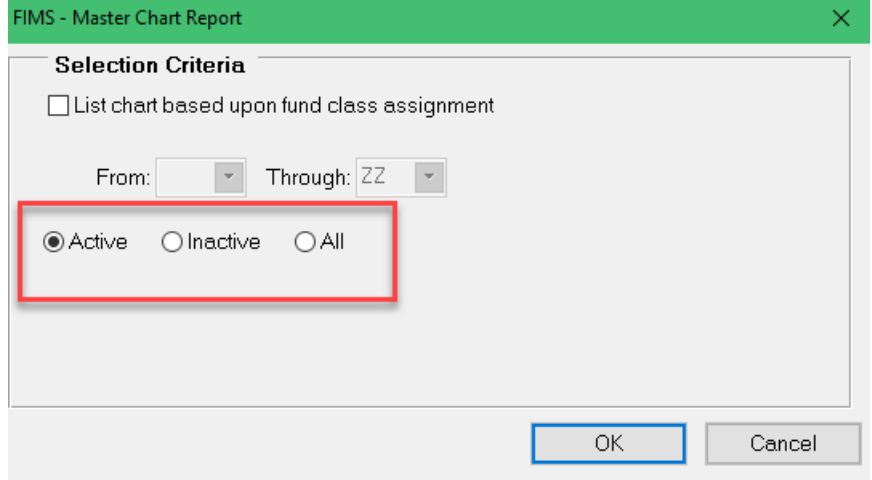
Click the **Case** tab at the top and click **Create New Case**.

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
1373074 1339735	DonorCentral NXT	<p>Improved Performance</p> <p>We've enhanced performance for extracts that contain uploaded files from DonorCentral NXT.</p>
1391364	General Ledger	<p>View Record Active Status in General Ledger</p> <p>In General Ledger, you can now filter Active, Inactive, or All records in the Master Chart of Accounts Maintenance and Master Chart Report.</p> <ul style="list-style-type: none"> - File Maintenance > General Ledger > Master Chart of Accounts Maintenance  <ul style="list-style-type: none"> - Reports > General Ledger > Master Chart Report



In addition, two new columns, **Active** and **DC Friendly Name**, now display in the [System Information Report](#) results.

To access the report, go to **Tools > System Utilities > System Reports > System Information Report**.

Acct	Description	Active	Account Type	Classes 1-120	Exp To DC	DC Friendly Name
11000	Checking - Sweep	yes	al Cur Assets	00 50 99	Yes	Merrill Lynch
11111	Remington Bronze	no	al Cur Assets		No	Remington Bronze
12000	Petty Cash	yes	al Cur Assets	99	No	
12500	Stock Gift in Transit	yes	al Cur Assets	00 50 99	Yes	Merrill Lynch
13000	Assets- Non-pooled Investments	yes	al Cur Assets	50	Yes	Merrill Lynch
13100	BB Merchant Services CC	yes	al Cur Assets	00 50 99	Yes	
14000	Assets in Equity Pool A	yes	al Cur Assets	00	Yes	Bank of America
14100	Assets in Fixed Pool B	yes	al Cur Assets	00	Yes	Bank of America
14200	Bank of New Hampshire	yes	al Cur Assets	00 50	Yes	Bank of New Hampshire

Create Individual Documents in FIMS (Includes changes to macros in Host*Net Word)

Create individual **Microsoft Word** or **Adobe PDF** files from a saved **Mail Merge** file all from within **FIMS** using the new **Create Individual Documents** feature.

How it works with Host*Net Microsoft Word

Host*Net users merge documents in Host*Net Word as before, and then use the new **Create Individual Documents** feature to create individual documents and perform other functions.

The **Create Individual Documents** process replaces macros that were removed from Host*Net's version of Word.

1570931

Microsoft Word Merge

Note for Host*Net users: Although Host*Net users can still run macros from locally-installed versions of Word, we recommended that Host*Net users use the Host*Net version of Word, store documents on the S: drive, and create documents using the **Create Individual Documents** process.

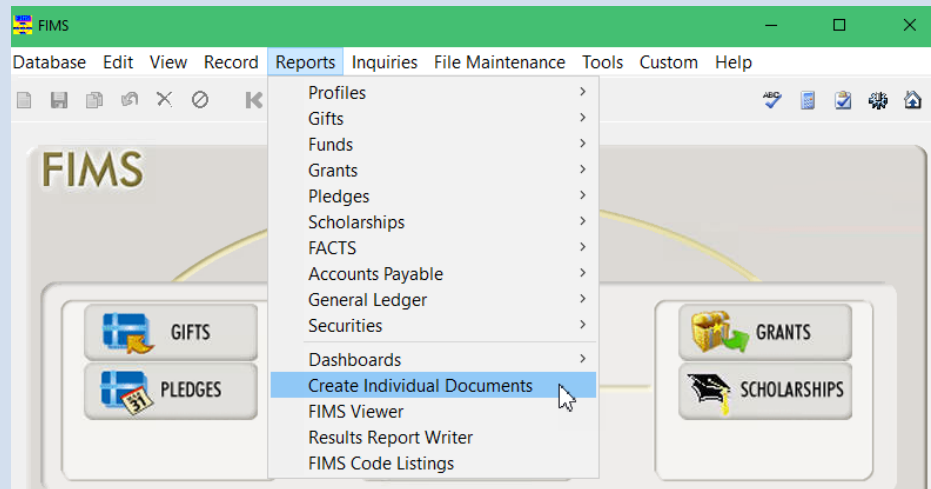
How it works with locally-installed Microsoft Word

Users on a locally-installed version of Word can use the new **Create Individual Documents** process, or they can use the macros in their locally-installed versions of Word as before.

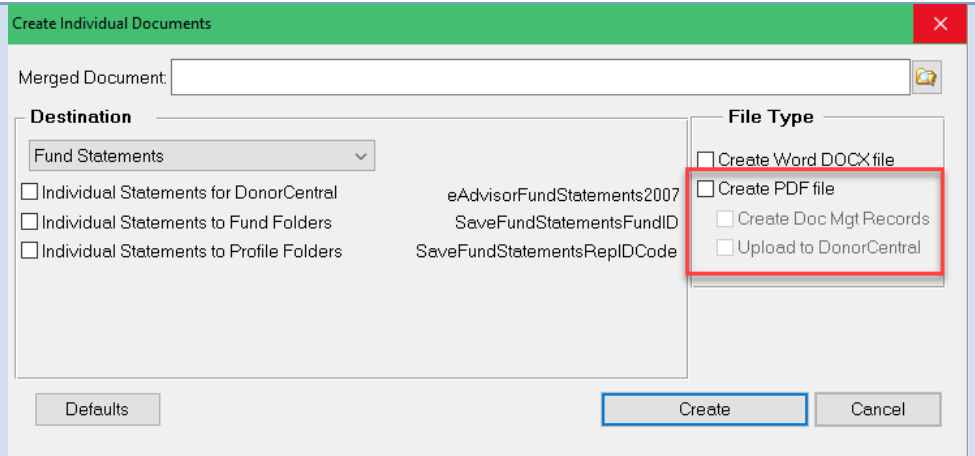
Where to find **Create Individual Documents**

The new feature is in **Reports > Create Individual Documents**.

For details on how to use this process, see [Create Individual Word Documents in Word from a Mail Merge](#).

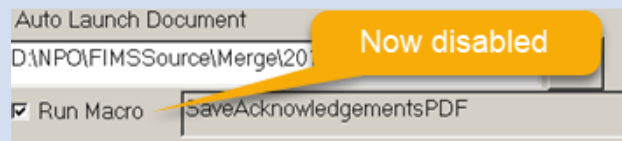


Those of you familiar with the **Create Individual Documents** feature from Host*Net's October 2020 update will notice new **Create PDF file** options:

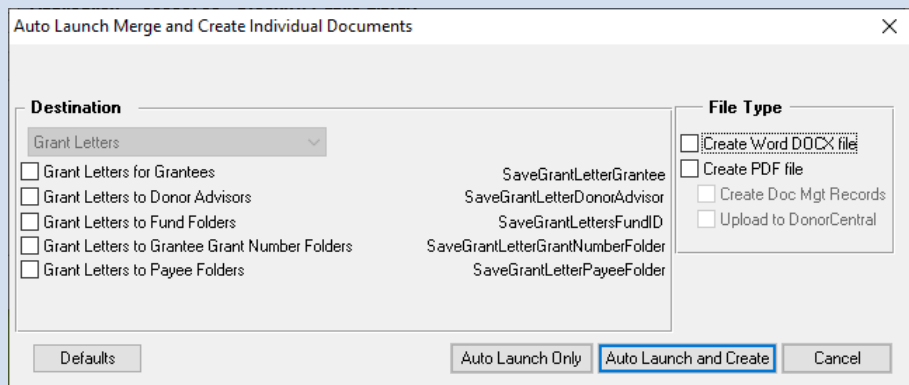


Updates for Auto Launch

In the **Auto Launch Document** feature, the previous **Run Macro** option is no longer available for exports in Host*Net and On Premise FIMS 14.73. You can still use the macro when it is installed directly in a locally-installed version of Microsoft Word.



During the **Create Individual Documents** process, a new **Auto Launch Merge and Create Individual Documents** screen displays to offer document creation options.



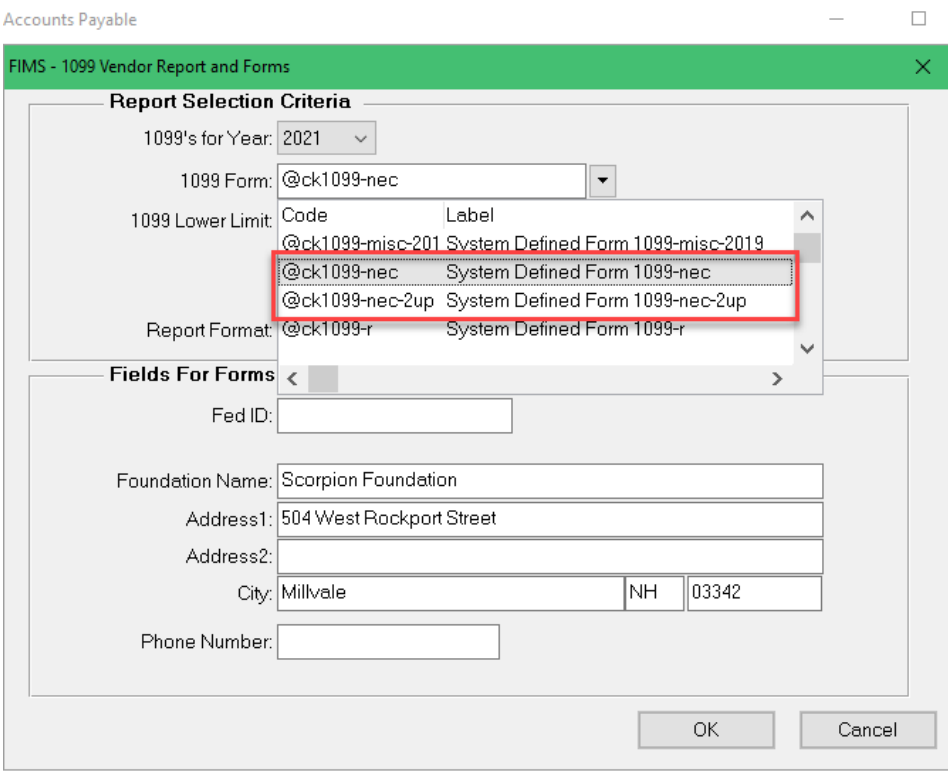
When working with Auto Launch, this screen:

- Doesn't display the **Merged Document** selection, because FIMS holds the merged document in memory.
- Doesn't allow a change to the **Destination**.

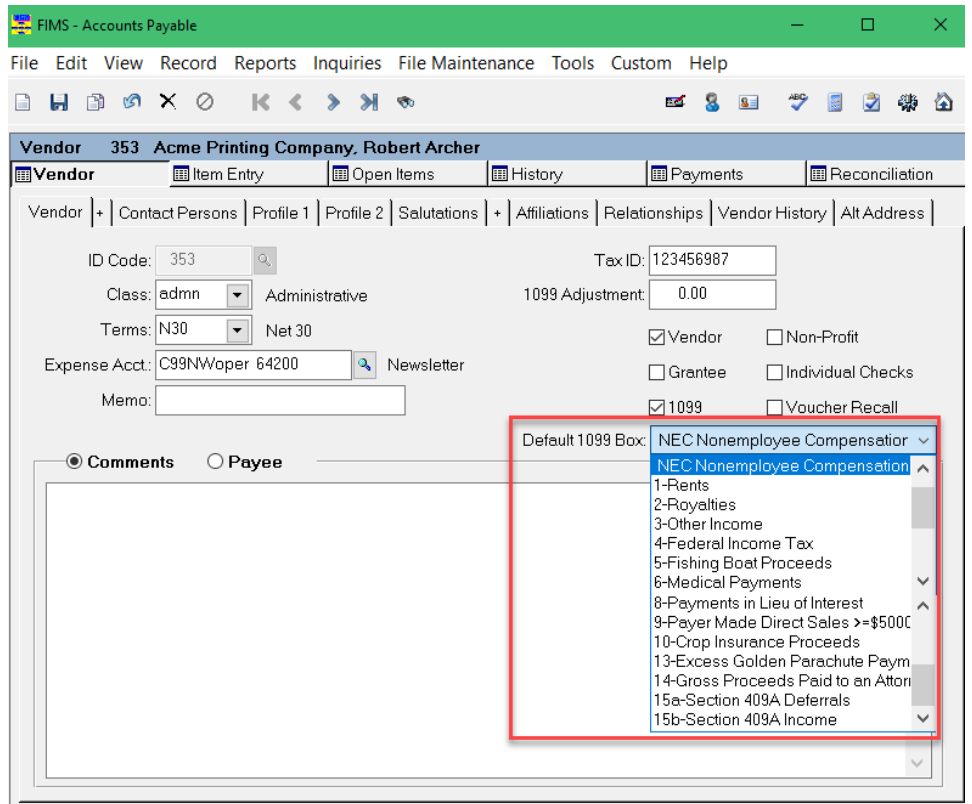
		<ul style="list-style-type: none"> • Allows Auto Launch Only – For the On-Premise user, this auto-launches the Merge Document but doesn't create individual documents. • Allows Auto Launch and Create – For the On-Premise user, this auto-launches the Merge Document and creates individual documents. • Allows Cancel to close out and not Auto Launch or create individual documents. <p>See Auto-Launch for more information.</p>
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1620115	Word Merge	<h3>Right-align Columns for non-DonorCentral Microsoft Word Statements from a Merged Document</h3> <p>In Host*Net, you can now run the right flush macro for non-DonorCentral Microsoft Word statements so that when you print the document, the gift and grant detail amount columns are right-aligned.</p> <p>This new option, called Word Merge – Right Flush Detail Amounts, accepts a merged Word document, runs Right Flush Amount logic, then saves the results to the same or different document into a folder of your choosing.</p> <ol style="list-style-type: none"> 1. Go to Reports > General Ledger > Word Merge - Right Flush Detail Amounts. <div data-bbox="609 1035 1170 1297" data-label="Image"> <p>A screenshot of a software menu. The menu items are: Consolidated Financial Statements, Consolidated Financial Statements Export, Fund Statements, Fund Statements Export, Word Merge - Right Flush Detail Amounts (highlighted in blue), and Columnar Financial Statements.</p> </div> <ol style="list-style-type: none"> 2. Choose your merged Word Document, your Save As Document, and select Run. <div data-bbox="561 1430 1372 1835" data-label="Image"> <p>A screenshot of a dialog box titled 'FIMS - Word Merge - Right Flush Detail Amounts'. It contains two text input fields: 'Word Document:' and 'Save As Document:'. Below the fields is a checkbox labeled 'Right Flush Amount' which is checked. At the bottom right are 'Run' and 'Cancel' buttons.</p> </div>
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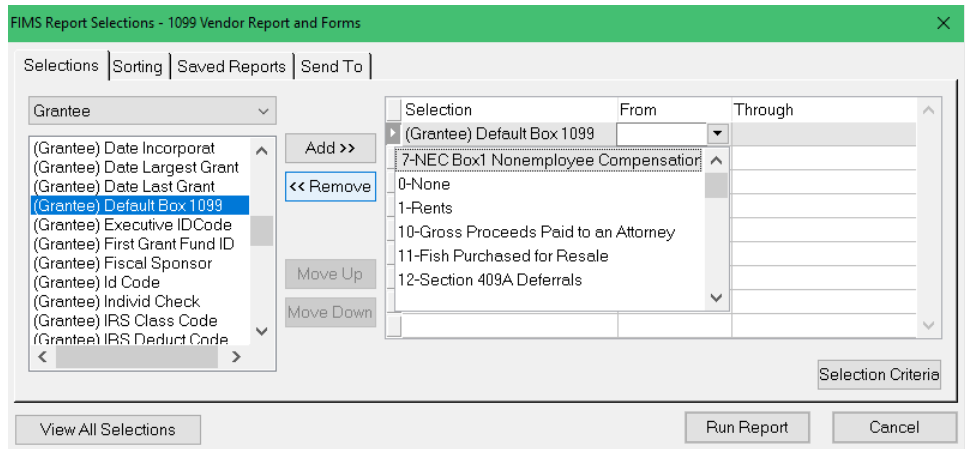
1698661	System	<p>When logging in, changing a password, or establishing and updating users, you can only enter passwords directly into a FIMS password field.</p> <p>You can no longer copy and paste a password into a FIMS password field.</p>
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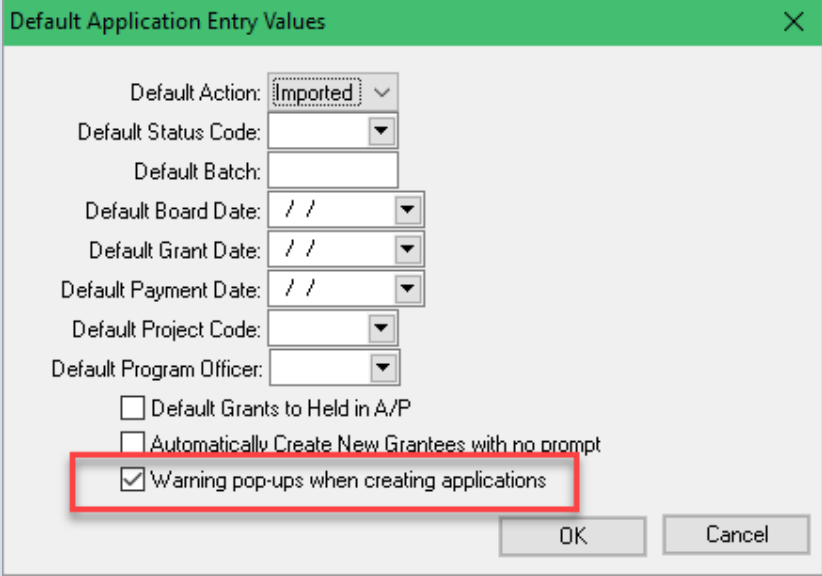
1780871 1871902	Accounts Payable 1099	<h3>Updates to support changes to the 1099 Form</h3> <p>To support IRS changes on 1099 form requirements for the 2021 tax year, we've made the following updates:</p> <ul style="list-style-type: none"> • 1099 forms now offer layouts to print 2 or 3 forms per page. <p>To choose a layout, go to Reports > 1099 Vendor Report and Forms > 1099 Form. Choose an option:</p> <ul style="list-style-type: none"> ○ System Defined Form 1099-nec – For 3 forms per page ○ System Defined Form 1099-nec-2up – For 2 forms per page 
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- The **Default 1099 Box** option now supports dropdown selections.



- When configuring the 1099 report, select the dropdown option for the **Grantee Default Box 1099**.

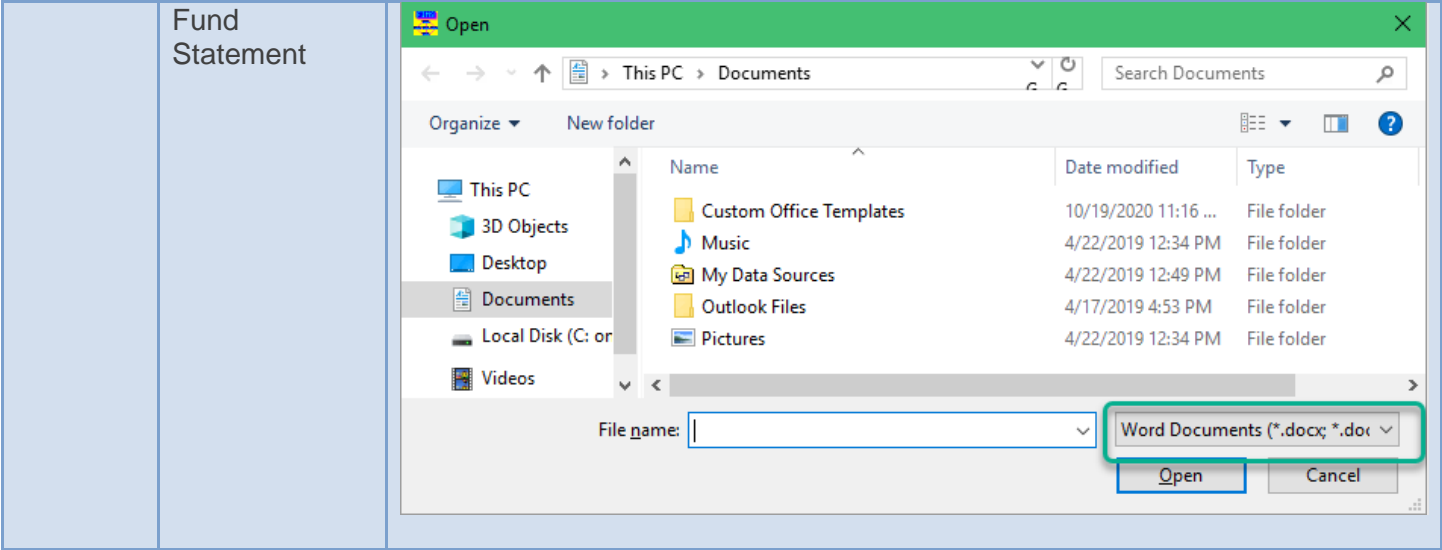


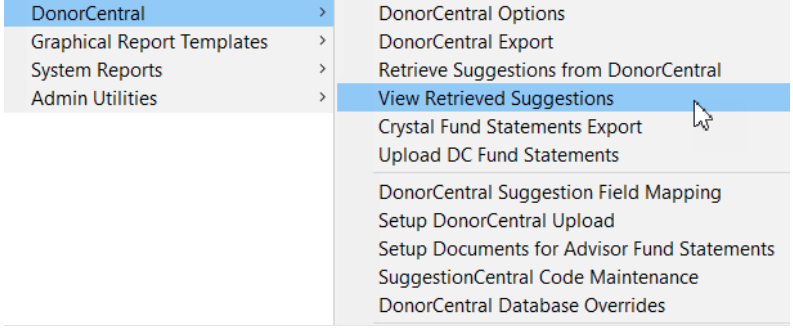
<p>1815368 1806994 1757507</p>	<p>DonorCentral Suggestion Import</p>	<h3>Improvements to DonorCentral Suggestion Imports</h3> <p>When creating applications from a DonorCentral NXT recommendation import, FIMS now checks the grant amount, the available amount to spend, and whether the grantee can accept grants.</p> <p>FIMS also:</p> <ul style="list-style-type: none"> • Checks for warnings when creating applications • Includes the <code>fundid</code> and <code>idcode</code> in warnings • Includes an option to turn off warnings <p>To turn off warnings when creating applications, clear the Warning pop-ups when creating applications option in Create Application Defaults.</p>  <p>Knowledgebase article 196559 contains information regarding this update.</p>
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Minor Enhancements

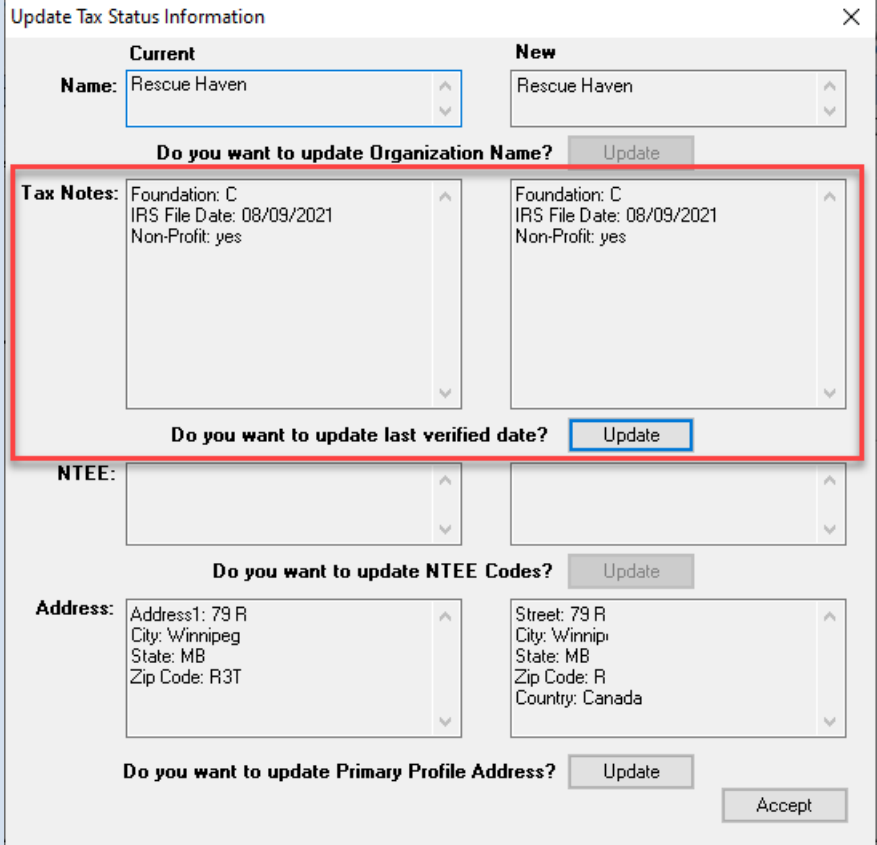
The following minor enhancements were added in this release.

ID	Module	Description
1301486		The Fund Statement Export lookup now uses one filter for .doc and .docx Microsoft Word documents.



1403122	DonorCentral NXT	<p>The new View Retrieved Suggestions menu item launches the Suggestion Import Window without attempting to retrieve new suggestions from DonorCentral NXT. This is useful for troubleshooting issues with the import that can occur.</p> <p>The new option is in Tools > System Utilities > DonorCentral > View Retrieved Suggestions.</p> 
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1429225	Grants	<p>When you verify the tax status on a Grantee Record, you can now update the timestamp and username of that verification, even when no changes are made to the data.</p> <p>To update the tax status verification timestamp:</p> <ol style="list-style-type: none"> 1. Go to Tax Status Verify, 2. Review the Tax Notes section. 3. Click Update next to Do you want to update last verify date? 4. Click Accept. The Date and By User update.
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		 <p>Knowledgebase article 193261 describes this update.</p>
1574898	Security	When the setting for complex passwords is enabled, the minimum length for passwords is 12 characters.
1584292	System	<p>Errors that generate from Progress platform FIMS is built upon are now easier to understand in these features:</p> <ul style="list-style-type: none"> - FIMS Crystal Viewer - Financial Reporting - General reporting
1732719	Gifts	In Gift History , the data grid shows non-gifts and soft credits as a “giftsoftcredits” entry.

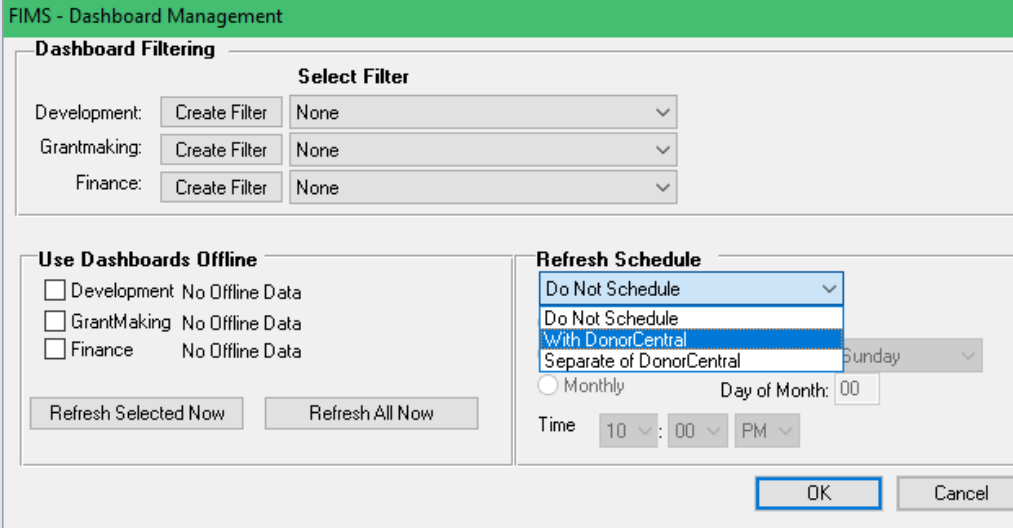
Knowledgebase article [195905](#) describes this update.

Resolved Issues

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

ID	Module	Description
1373074 1422547	DonorCentral Uploads	In FIMS, canceling an Export to DonorCentral while data is still transferring to DonorCentral no longer causes a partial data upload and data loss in DonorCentral .
1376044	Profiles	You can now delete an invalid or temporary Affiliation Code from a profile in File Maintenance Profiles . Knowledgebase article 197250 describes this issue.
1403121	DonorCentral NXT	When importing DonorCentral NXT Suggestions that include a long Grantee Name , the following error no longer occurs: <i>"The total length of the fields in an index exceeds max key size. Index GranteeName of table (TEMP-TABLE)ttSuggestion (129)(11353)"</i> Knowledgebase article 193026 describes this issue.
1414398	Admin Fees	The Administrative Fee Report once again generates the expected Admin Fee data. Knowledgebase article 193150 describes this issue.

1420094	Extract to FE NXT or RE NXT	<p>During data extraction for Raiser's Edge or Financial Edge, a warning now lets you know when a FIMS fiscal year Start Date doesn't exist.</p> <p>You can change the Start Date to a fiscal year that exists within FIMS.</p>
1430109	DonorCentral NXT	<p>We've resolved an issue that prevented Admin Fee Transactions from displaying on DonorCentral NXT. Now, transactions display as expected on DonorCentral NXT in the Fund Activity Report.</p> <p>In addition, the calendar export of General Ledger History for Fiscal Year now contains all client data from the end of the fiscal year to the end of the calendar year.</p> <p>Knowledgebase article 193272 describes this issue.</p>
1456505	FieldMaker Host*Net	<p>On FieldMaker Host*Net, an error no longer occurs when accessing tabs in the Grants and Gifts modules.</p> <p>Knowledgebase article 189478 describes this issue.</p>
1485795	Accounts Payable	<p>When paying a voucher in FIMS using ACH as the payment method, we've added validation to ensure that Vendor ACH information matches Voucher ACH information. The validation prevents ACH payments from pulling ACH information from the wrong profile.</p> <p>The validation is included in these Accounts Payable features:</p> <ul style="list-style-type: none"> - Item Edit Report - Check Print - Open Items Datagrid \$ErrorWarning column <p>Knowledgebase article 191534 describes this issue.</p>
1506645	Dashboards	<p>In Tools > System Utilities > Dashboard Maintenance, the Refresh Schedule: With DonorCentral option now ensures the process completes without user interaction.</p>

		 <p>Knowledgebase article 197248 describes this issue.</p>
1571965	Microsoft Word Merge	<p>We've resolved an issue that occurred during a mail merge from FIMS when Microsoft Word was in the Reading Layout. The following error occurred: <i>"Error-Occurred-while-accessing-component-property-method-Destination-Requested-object-is-not-available-Error-Code-0x80020009-gui-system-MergeDoc-p-5890."</i> This issue also prevented documents from attaching.</p> <p>Now, if Word isn't ready to merge, the following messages display to indicate status:</p> <ul style="list-style-type: none"> - wdNormalDocument 0 Document is not involved in a mail merge operation - wdMainDocumentOnly 1 A main document with no data attached - wdMainAndHeader 3 A main document with an attached header source - wdMainAndSourceAndHeader 4 A main document with attached data source and header source - wdDataSource 5 A data source with no main document. <p>Knowledgebase article 114311 describes the reading layout issue.</p>
1592294	Fieldmaker	<p>Fieldmaker can now complete a commit even when there are no Linked Files.</p>
1581378	FIMS Security	<p>After enabling the Complex Passwords option, a user must change their password to log in. This occurs when an admin creates a new user account or when they change a user's password.</p>

1582133	Grant Import	<p>Grant imports now create applications using the alternate contact name (Alt Contact Name) when the field is mapped for import.</p> <p>Knowledgebase article 194460 describes this issue.</p>
1622053	Document Management and DonorCentral NXT	<p>You can now upload documents to DonorCentral NXT that contain an ampersand (&) in the name.</p> <p>We've also resolved an issue for On Premise customers, so an error no longer occurs when accessing ActiveDocument.</p>
1647535	Tools	<p>In Grants, users with rights to the Conditions tab no longer encounter an "Access Denied" message.</p> <p>Additionally, users can now remove the process for "Acknowledge Matching Pledges" from the rows in the User Permissions report.</p> <p>Knowledgebase article 196752 describes this issue.</p>
1663933	Accounts Payable	<p>In Accounts Payable Print Check, the Open Items range now defaults to 999999999999 so that grant or voucher numbers larger than 2999999999 no longer need manual editing.</p> <p>Knowledgebase article 195230 describes this issue.</p>
1684584	DonorCentral Suggestion Import	<p>When importing a suggestion from DonorCentral NXT and creating an application, the import now respects the value of Yes on the Default_Grant_Hold option to create the grant application and place the application on hold.</p> <p>Knowledgebase article 196896 describes this issue.</p>
1697318	DonorCentral Uploads	<p>You can now upload to DonorCentral NXT when over a million shares in gift comments are uploaded.</p> <p>The Gift_Description (in Tools > System Utilities > DonorCentral > DonorCentral Options > System), when set for Comm_Securities, uploads to DonorCentral NXT and completes successfully and displays all gift comments.</p> <p>Knowledgebase article 197000 describes this issue.</p>

1709576	Asset Rebalancing	<p>When running the process to create Asset Rebalancing Entries (General Ledger > Asset Rebalancing > Processing > Asset Rebalancing Entries) in General Ledger, the apply date now displays the correct, full year in the report.</p> <p>Knowledgebase article 195654 describes this issue.</p>
1714843	Accounts Payable 1099	<p>When creating the 1099 NEC Electronic File from the 1099 Vendor Report with Fund Information or the 1099 Vendor Report and Forms using the 1099 NEC 2020 form, the Electronic File Total amount now matches the Accounts Payable 1099 report's total amount.</p> <p>Knowledgebase article 195701 describes this issue.</p>
1729447	Grant Import	<p>Grant imports now populate the Donor ID and Advisor ID when the system settings are set to auto populate these fields (Tools > System Utilities > System Options Grants > Default_DonorAdvisor_Fund_Rep_type).</p> <p>Knowledgebase article 195859 describes this issue.</p>
1745923	DonorCentral Suggestion Import	<p>Applications created from imported DonorCentral NXT recommendations no longer have the word "Txt" added to the beginning of fields.</p> <p>Knowledgebase article 196414 describes this issue.</p>
1779783	Profiles	<p>FIMS now checks email addresses for a dash (-) after the ".com," because the dash prevents DonorCentral NXT transfers from completing.</p> <p>The validation occurs in the following areas:</p> <ul style="list-style-type: none"> • All email fields • DonorCentral NXT uploads • System Integrity Report > Check Profile (Tools > System Utilities > System Reports) <p>Knowledgebase article 197251 describes this issue.</p>
1814131	Accounts Payable Voucher Import	<p>During an Accounts Payable voucher import (File Maintenance > AP Voucher Import), you can now update Vendor ID information without encountering an error when the Update Vendor ID information box is selected.</p> <p>Knowledgebase article 197252 describes this issue.</p>

1816959	Extract to FE NXT	The GL Export now includes a column for the Functional Expense when extracting data for Raiser's Edge or Financial Edge (Found in Tools > System Utilities > System Reports > Extract Data for RE and/or FE Conversion).
1850613	Scholarships	You can now change the Grantee of an Historical Scholarship even if the student is not the Grantee . You can't change the grantee if the student is designated as Mail Check To . Knowledgebase article 196859 describes this issue.
1857263	DonorCentral Uploads	When the Donor Name and Organization Name are the same, the donor's name no longer displays twice in the Address Block when uploading data to DonorCentral NXT . Knowledgebase article 196999 describes this issue.
1859791 1848880	DonorCentral Suggestion Import	Applications created from DonorCentral NXT recommendations now display in the Grants module and include the FUND ID . The error, " <i>Attempt to exceed maximum size of a CHARACTER variable (9324)</i> ," no longer occurs. Knowledgebase article 196915 and Knowledgebase article 196917 describe the issues.
1861575	DonorCentral NXT	When creating applications from DonorCentral NXT Suggestions , but the advisor doesn't have the grant recommendation permissions for the fund, a prompt now displays to choose an advisor. Knowledgebase article 196934 describes this issue.
1900328	Microsoft Word Merge	Improvements were made to the Create Individual Documents feature: <ul style="list-style-type: none"> • Speed of statement creation is improved • Messages display to alert you of the steps in the process • Statements display without flickering Knowledgebase article 197530 describes this issue.

1902364	DonorCentral NXT	Grant documents that have grant numbers of less than 8 digits and gift numbers of less than 4 digits now upload to DonorCentral NXT . Knowledgebase article 197294 describes this issue.
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