

FIMS 14.60 Upgrade Guide

Overview

This document provides details on the process of upgrading a local on premise FIMS installation to the latest version of FIMS using an .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.

Clients with a version of FIMS prior to 12.50 must contact FIMS Support.

Upgrading Notes

Progress Database

FIMS version 14.60 now supports OpenEdge Progress version 11.6 and later, in addition to version 10b.

Check your Progress version in FIMS by clicking **Help > About FIMS**.

Contact [Support](#) for any assistance needed with upgrading Progress.

Server-Installed FIMS

If FIMS is installed on a server, you must run the update from the server. No other users may be logged in during the process.

Current IGAM Users

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

Update Preparation

Identify the location of your FIMS installation. This is typically X:\npo, D:\npo or E:\npo. **Not** the mapped N: drive.

- My FIMS installation is at: _____
- My FIMS Version is (*Help > About FIMS*): _____

Compatibility Notes

Windows Operating Systems

- Workstations must have Windows 7, 8, or 10 installed.
- Servers must have Windows Server 2008 or later installed.
- **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 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 FIMS Support for more information.

Crystal Reports

If you are currently using Crystal Reports, be aware reports written in Crystal Reports earlier than version 9.0 will not connect to Progress 10.x databases.

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

FIMS 14.6 with Progress OpenEdge version 11 will require an upgrade to Crystal version 13. See the [14.6 Release notes](#) for information.

OS

OS updates are not automatically certified but are supported where the OS vendor guarantees backwards compatibility with the base line 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 only a desktop installation of **Office 2007/2010/2013** connected to Office 365 is fully compatible.

FIMS 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

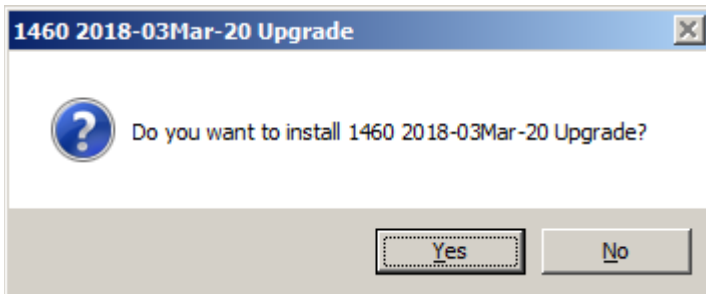
Online: Visit Case Central at <https://www.blackbaud.com/casecentral/casesearch.aspx>. Click the **Case** tab at the top and click **Create New Case**.

Upgrading FIMS

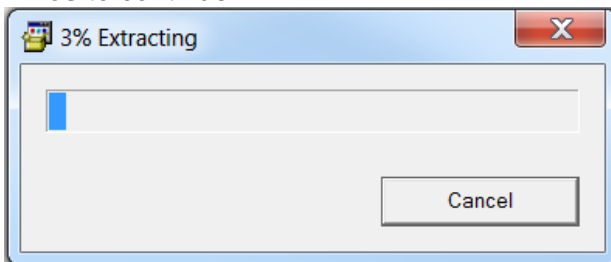
Before beginning, ensure that all users are logged off and all instances of FIMS are closed, meaning that FIMS is not open on any machine. The database, however, must still be running.

1. Run the **FIMS 1460.exe** file to begin the installation.

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

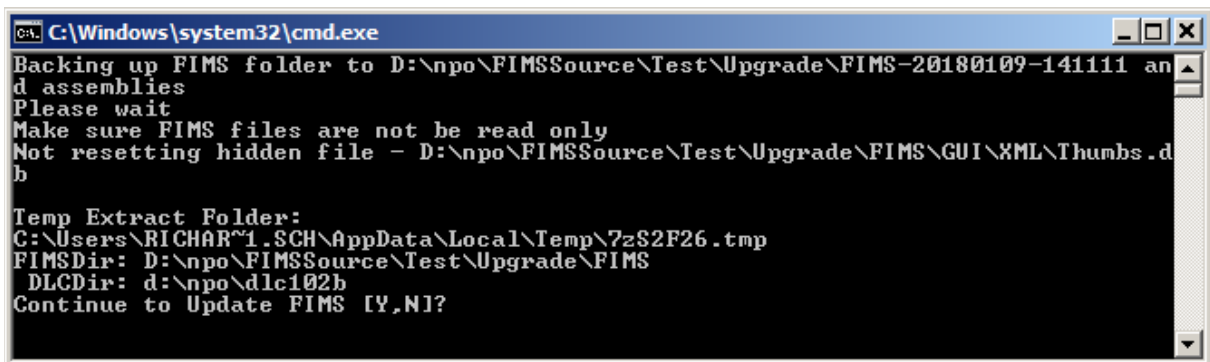


2. Click **Yes** to continue.



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.

```

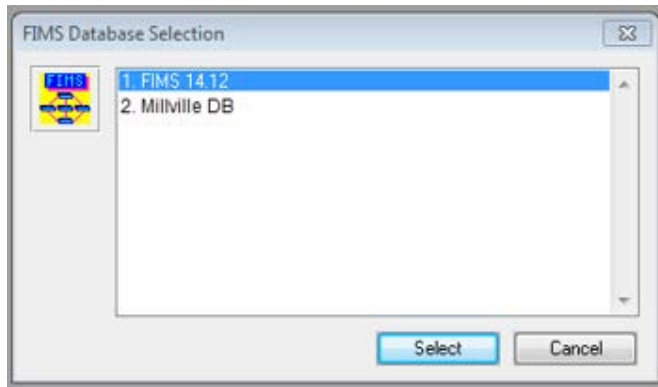
C:\Windows\system32\cmd.exe
Backing up FIMS folder to D:\npo\FIMSSource\Test\Upgrade\FIMS-20180109-141111 and
d assemblies
Please wait
Make sure FIMS files are not be read only
Not resetting hidden file - D:\npo\FIMSSource\Test\Upgrade\FIMS\GUI\XML\Thumbs.d
b
Temp Extract Folder:
C:\Users\RICHAR~1.SCH\AppData\Local\Temp\7zS2F26.tmp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

```

12. After the files finish copying, the FIMS Database Selection window displays. Click on the database you want to update and click **Select**.



13. 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 . . .

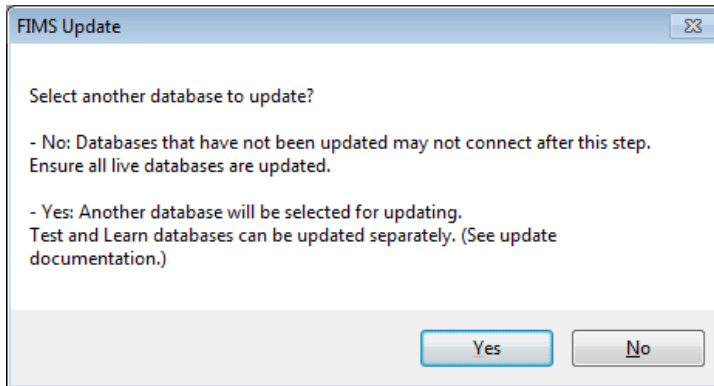
```

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

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

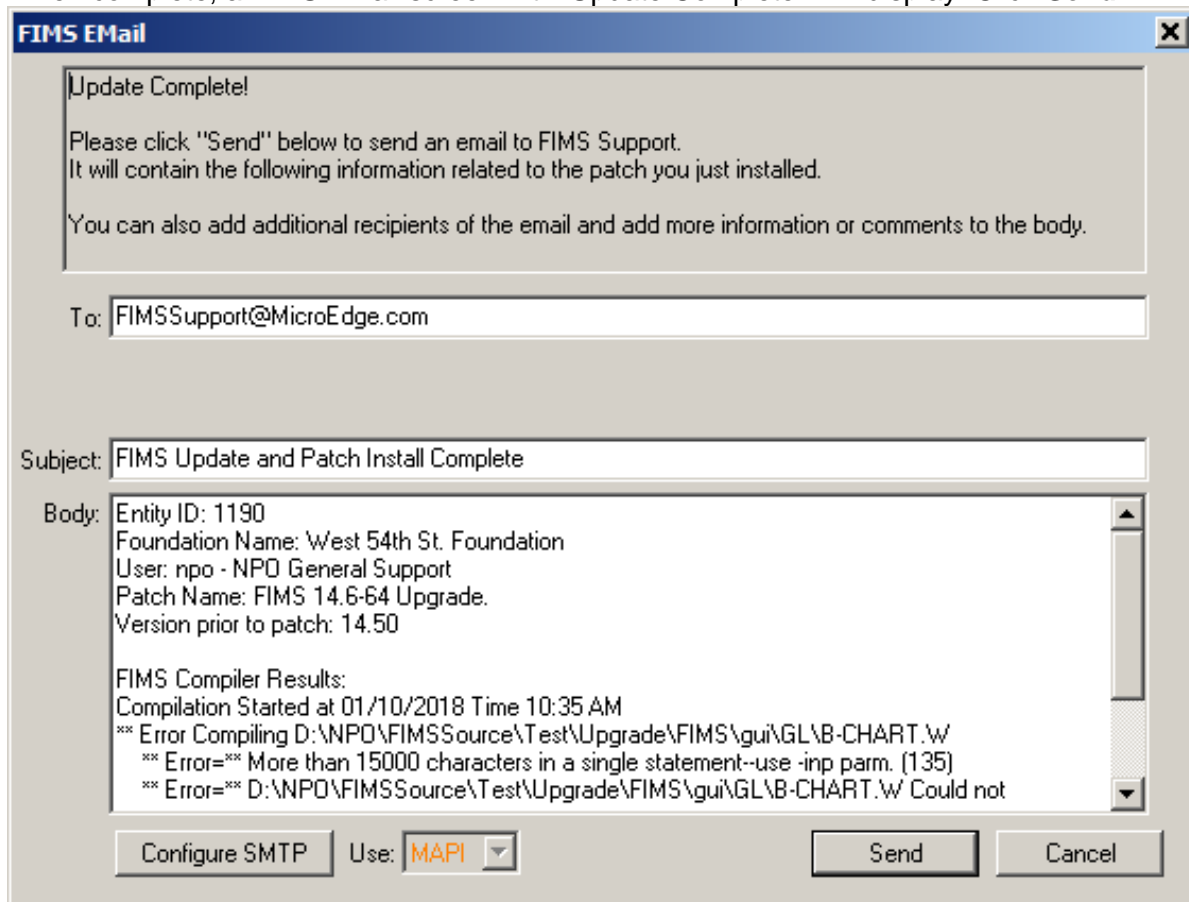
Note: If errors display in this window, before clicking **Exit**, make a copy of ...\\FIMS\\fcompile.err and send it to FIMS Support to analyze the compile errors.

15. If you have multiple production databases, the screen below displays. Click **Yes** to be brought back to step 12 above so you can choose the next database to update.

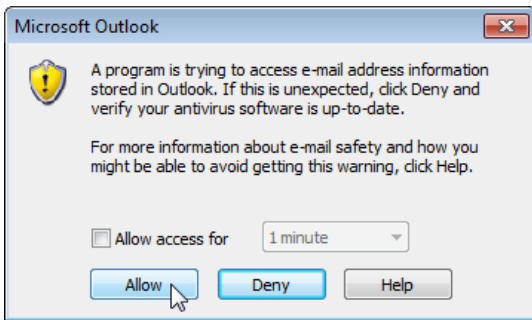


NOTE: Choosing **No** may require FIMS Support to update the other databases in the future.

16. When complete, a FIMS Email screen with 'Update Complete!' will display. Click **Send**.



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

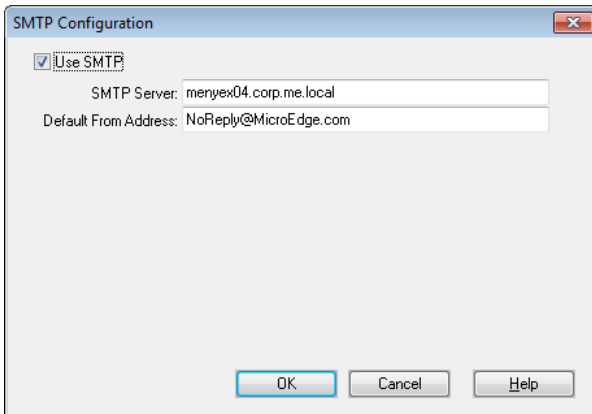


NOTE: If your server does not have an email client installed, you have two options:

- (1) Configure SMTP in FIMS; or
- (2) Copy the Body to another document such as MS Word, Notepad or WordPad then email from a workstation.

Configuring SMTP

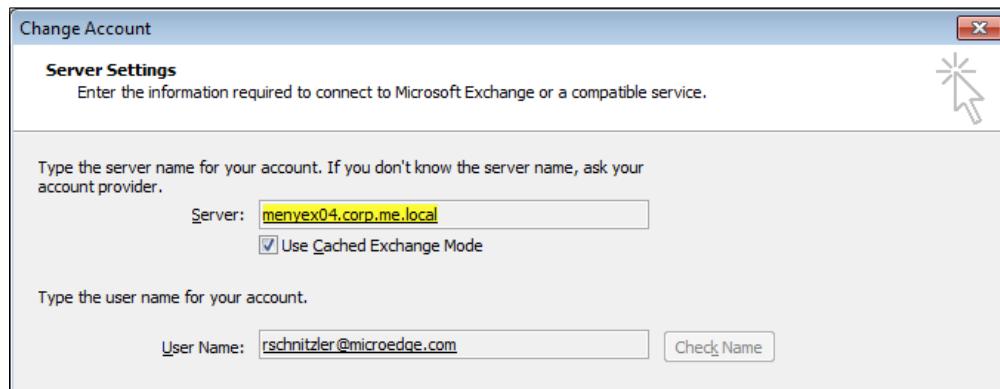
Click **Configure SMTP** and enter the **SMTP Server** and a **Default From Address**.



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.



17. When complete, click any key to finish.
18. On the workstations, the first time that FIMS is run after the upgrade, be sure to run FIMS as administrator so that all .NET assemblies are updated.

Updating Test & Learn Databases

1. Double click **Stop All DBs** shortcut on the server desktop.
 - a. Wait about 30 seconds. It takes a moment for the databases to fully shut down.
2. Double click **Copy Live to Demo**.
3. Type in **Y** and press **Enter**.
4. Once the DOS window has closed, double click **Start All DBs**.