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CRM Servicing - Hotfixes and Update Rollups

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CRM Servicing – Hotfixing and Update Rollups

- CRM Sustained Engineering overview

- Support Lifecycle overview

- Hotfix overview

- Update Rollup overview / FAQ

- Additional deployment methods

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CRM Sustained Engineering overview

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Who is the CRM Sustained Engineering Team?

- Who is the CRM Sustained Engineering Team (CRM SE)?
  - A dedicated team of developers, testers, and managers who are an integral part of the Microsoft Dynamics CRM Product Group

- What do they do?
  - Develop, test, and release hotfixes and Update Rollups
  - Immediately after CRM RTM's until the end of product lifecycle
  - Updates for Server, Client, E-mail Router, SRS Connector, etc.

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Support Lifecycle overview

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CRM Product Lifecycle and Supported Versions

- Product Lifecycle - www.microsoft.com/lifecycle
- Currently supported versions:
  - Microsoft Dynamics CRM 3.0
    - On-Premise
    - Service Provider Edition
    - Mainstream Support Retires 4/12/2011
    - Extended Support Retires 4/12/2016
  - Microsoft Dynamics CRM 4.0
    - On-Premise
    - Service Provider Edition
    - Microsoft CRM Online
    - Mainstream Support Retires 4/9/2013
    - Extended Support Retires 4/10/2018
  - Microsoft Dynamics CRM 2011
    - Microsoft Dynamics CRM 2011 Online
    - On-Premise (Supported after RTM in Q1 2011)

Phases of the Support Lifecycle

Type of support	Mainstream support phase	Extended support phase	Self-help online support
Request to change product design and features	✔	✖	Free access to online content, such as Knowledge Base articles, online product information, and online support WebCasts
Security updates	✔	✔	
Other non-security hotfixes	✔	☆	
Complimentary support[1] included with license, licensing program[2], and other no-charge support programs	✔	✖	
Paid support (including pay-per-incident Premier and Essential Support	✔	✔	
Product category applicability	Applies to all products	Applies to business and developer software only	Applies to all products

✔ Available   ✖ Not available   ☆ Available only with purchase of Extended Hotfix Support Agreement

[1] Refers to phone support and online support options.

[2] For example, support incidents acquired through the Software Assurance program for server products.

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Hotfix Overview

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Hotfix Overview

- A hotfix is an installer package which updates product files and/or the database to resolve product issues.

- Released hotfixes are available by contacting CRM Support through normal channels, or by installing a subsequent Update Rollup release that contains them

- More recently-released hotfixes can be downloaded directly from the top of the associated Microsoft Knowledge Base article:

Hotfix Overview

- Beginning with Microsoft Dynamics CRM 4.0 Update Rollup 3, only critical fixes are released as standalone packages
  - Similar hotfix model to other Microsoft products
  - Only mission-critical fixes, including but not limited to crashes, lockups, data loss, and data corruption, are now shipped as individual hotfixes
  - Consult your CRM Premier Field Engineer or Designated Support Engineer if you are aware of a non-COD fix that you need before the associate Update Rollup is released

Microsoft CRM Support Hotfix Process

- Hotfix Investigation (HFI)

  - Microsoft CRM support process when a potential bug exists.

  - Submitted by Technical Support Engineer working on case

- Hotfix Request (HFR)

  - If HFI process deems there is indeed a bug and no reasonable workarounds, then a HFR will be submitted to the CRM SE team

- Critical Design Change Requests (CDCR)

  - Submitted when CRM is working by design, but a design change should be considered

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Update Rollup overview / FAQ

What is a Microsoft CRM Update Rollup (UR)?

- An update rollup is a well-tested, easy-to-deploy collection of software updates
  - Cumulative - UR4 contains UR1, UR2 & UR3 as well

- Each update package file uses the form CRM_*version*-*KBNumber*-*platform*-*application*-*Language*.exe.
  - Ex: CRMv4.0-KB961768-amd64-Server-ENU.exe. Microsoft Dynamics CRM Server update rollup package for x64-bit editions.

Should I always apply the latest Update Rollup?

- Microsoft recommends that you apply the latest UR's

- Customer testing & resource limitations may make application of each UR problematic due to the rapid Update Rollup release cycle – every ~8 weeks

- What preventative actions should I take before I apply an Update Rollup?
  - KB 968793 - Back up the Web.config file if the file has been customized or those customizations will be overwritten
  - Test – Customers are encouraged to test specific user functionality before installing UR's.

- Additional Manual Configuration
  - KB Section: "Hotfixes and updates that you have to enable or configure manually"

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How can I get notified when an Update has been released?

- There are two ways to accomplish this:

  - From a computer that is running a Microsoft Dynamics CRM client application:

    - In the Navigation Pane, click Settings, click Administration, and then click Product Updates

    - In the Microsoft Dynamics CRM Product Updates form, sign in to the Windows Live ID service

    - Select the Subscribe box, confirm your e-mail format, e-mail address, and privacy options, and then click Continue

  - Go directly to the subscription Web page at Microsoft Dynamics CRM Product Updates:

    - http://go.microsoft.com/fwlink/?LinkId=95056

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In what order should I apply packages associated with an Update Rollup?

- All server roles or server role groups must have the same Update Rollup applied within the same period of time before going live

  - NLB – Update all nodes with same UR's

  - Post UR7 - Mixed UR versions are supported

- CRM Outlook clients should also have the same UR installed as the server, but can function at higher or lower UR levels

How can I automatically deploy a CRM 2011 Update Rollup to CRM Outlook clients?

- You can configure a CRM 2011 Update Rollup to be automatically deployed on computers that are running Microsoft Dynamics CRM for Outlook via Microsoft Updates

- Another option to deploy Update Rollups or standalone hotfixes is to use SMS, SCCM or similar management software
  - Allows for non local administrative installs
  - http://blogs.msdn.com/crm/archive/2008/02/22/how-to-deploy-microsoft-dynamics-crm-client-through-sms.aspx

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What Microsoft software distribution mechanisms do not apply to Dynamics CRM servicing?

- Windows Group Policy Objects (GPO)
  - GPO was not designed for servicing, and as such is not able to distribute software that uses .MSP

- "Slipstreaming"
  - CRM Hotfixes and Update Rollups do not support slipstreaming

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How can I avoid having my system restart after applying an Update Rollup for Microsoft Dynamics CRM for Outlook?

- To avoid a system restart after you apply an Update Rollup, follow these steps:
  - Confirm the following processes are not running on the client machine
    - Microsoft.CRM.Application.Hoster.exe
    - Outlook.exe
    - Other MS Office applications – Ex: Winword, Excel, etc.
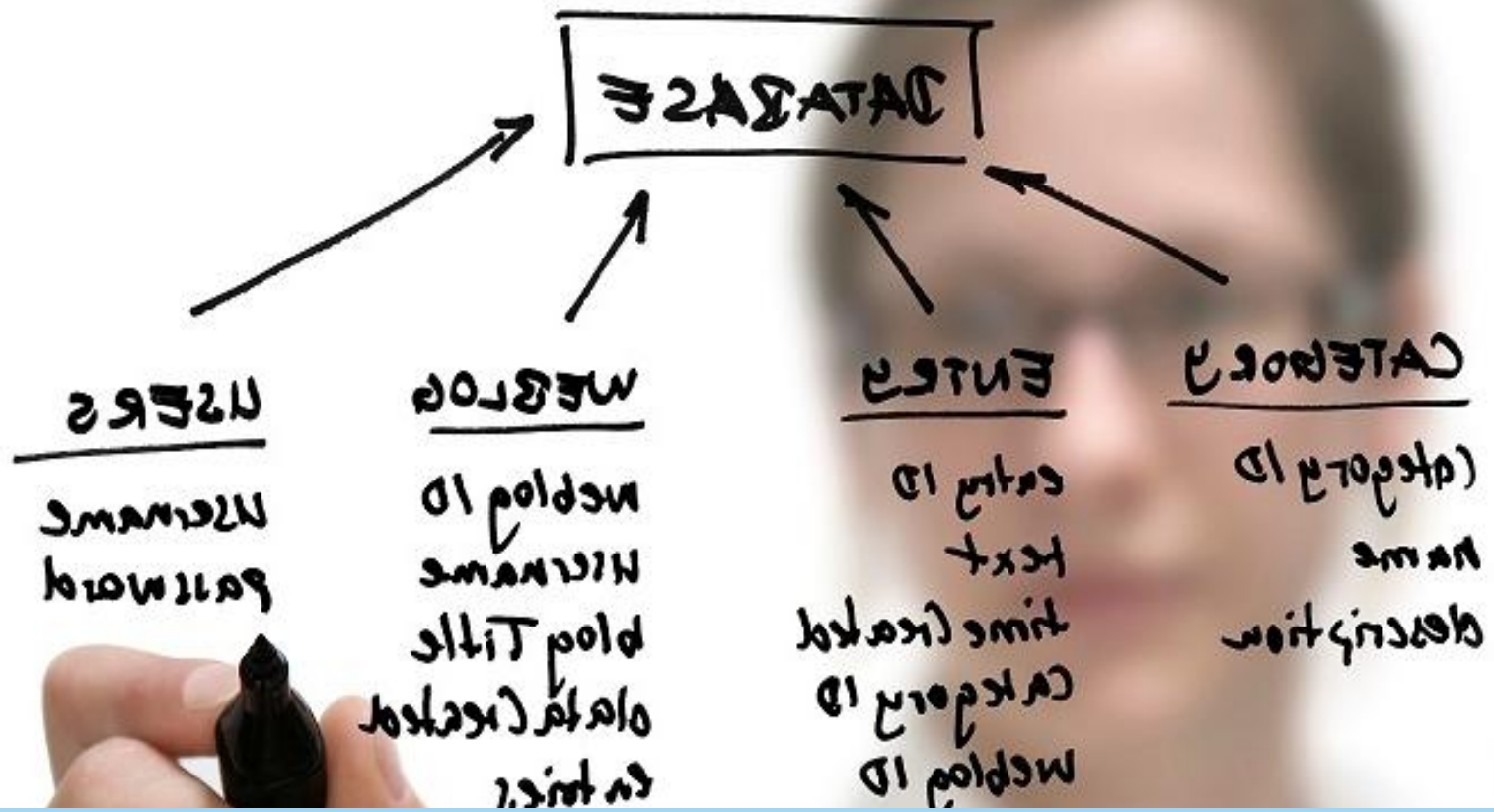
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How can I check to see if an Update Rollup has been applied?

- There are two ways to see if an Update Rollup has been applied:
  - In Windows Server 2008 and Windows 7, Click Start, open Control Panel, open Programs and Features. In the left pane click View installed updates and look for Microsoft Dynamics CRM Server in the list
  - View the details of a binary file in the drive:\Program Files\Microsoft Dynamics CRM\Server folder, such as CrmVerServer.dll. To do this, right-click the file, click Properties, click the Version tab, and view the file version
    - File versions for associated Update Rollups are included in the UR KB's
    - Ex: Update Rollup 4 - 04.00.7333.1551
  - Update Rollup FAQ - http://rc.crm.dynamics.com/rc/regcont/en_us/opdefault.aspx

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Summary

- In this module you learned…
    - Who creates Microsoft Dynamics CRM hotfixes and Update Rollups (Sustained Engineering overview)
    - Important details about the Microsoft Support Lifecycle
    - Details about Microsoft Dynamics CRM hotfixes
    - Details and answers to Frequently Asked Questions about Microsoft Dynamics CRM Update Rollups
    - About various deployment options for Microsoft Dynamics CRM Hotfixes and Update Rollups

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Questions?