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# Product Update Installation Information for Microsoft Dynamics CRM Spring Wave '14

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# Introduction

The Microsoft Dynamics CRM Online Spring '14 and Microsoft Dynamics CRM 2013 Service Pack 1 have many new features and updates for your CRM deployment. Some of these features are disabled by default to prevent disrupting your CRM experience. However, you have the option to enable these features by installing the product updates in **Settings > Administration > Install Product Updates**. Your customized views, dashboards, forms, ribbon or sitemap may be affected by installing the product updates. This paper explains what specific areas are affected and how you can bring back the behavior you may have lost.

It is critical that you leverage your sandbox environment and install the product updates to determine if any of the following scenarios apply to your organization. This will help ensure your production environment updates will go smoothly. For more information about sandbox environments, see: [Sandbox Instances in CRM Online](#).

This documentation is to be used in conjunction with the following:

- [Install product updates](#) topic in the Administration Guide
- [Microsoft Dynamics CRM Online Fall '13 and Microsoft Dynamics CRM 2013 Readme](#)

## Existing views for cases and queues, do not show enhancements introduced by the CRM Spring '14 update.

Some of the existing views for Cases and Queues don't show the enhancements (new columns) introduced in Microsoft Dynamics CRM Online Spring '14 and Microsoft Dynamics CRM 2013 Service Pack 1.

**Note:** If you have not customized the existing views, the new columns are added automatically, when you install the product updates.

For the out-of-box views that have been customized, the new columns are not added automatically, when you install product updates. Your customizations to the views are preserved, however, you will need to manually update the views, to add the new columns.

More information on how to update a view: [Create or edit a public view for an entity](#)

## Case views

The following case views have been enhanced with new columns:

- ▶ Active Cases
- ▶ Active Cases Opened in the Last 7 days
- ▶ All Cases
- ▶ Cases Opened in the Last 7 days
- ▶ Cases Resolved By Me in the last 7 days
- ▶ Cases Resolved in the last 7 days
- ▶ My Active Cases
- ▶ My Active Cases Opened in the Last 7 days
- ▶ My Connections

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- ▶ My Resolved Cases
  - ▶ My Team Members' Resolved Cases
  - ▶ Recent Cases
  - ▶ Resolved Cases

The following columns have been introduced to the Case views. Not all columns are present in each particular view:

- ▶ Origin
- ▶ Customer
- ▶ Owner
- ▶ Status
- ▶ Status Reason
- ▶ First Response by
- ▶ Resolve by

## Queue views

The following views have been enhanced with the new columns or updated:

1. All Queues
  - Owner
  - Status
  - Queue Items
  - No. of Members
  - Type
2. Active Queues
  - Owner
  - Queue Items
  - No. of Members
  - Type
3. My Active Queues
  - Queue Items
  - No. of Members
  - Type
4. Queue Item Associated View
  - Queue  
(This column has been removed)
  - Worked By  
(This column has been added)

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## Queue refreshed form is added as a default queue form after the product updates have been installed.

With the introduction of the 'Queue' refreshed form in the CRM Spring '14 update, the following behavior occurs after you install the product updates.

Users	More information
<b>Existing organization (existing users/new users)</b>	<p>If you had a custom queue form set as your default form, this form will be replaced with the newly introduced queue refreshed form. The queue refreshed form becomes the default, top order queue form. All of your custom queue forms are preserved and those that were in the active state before you installed the product updates, will remain in the active state.</p> <p>If the out-of-box queue information form was in the active state, it'll remain in the active state. The new refreshed queue form also will be in the active state.</p> <p>If you don't have any custom queue forms, your default queue information form will be replaced with the newly introduced queue refreshed form. The queue refreshed form becomes the default top order queue form. The queue information form and any customizations to it will be preserved. The new queue refreshed form will be in the active state.</p>
<b>New sign-ups</b>	<p>The queue refreshed form is the default form, however, the queue information form is still available. If your organization wants to use the queue information form you can simply update the form order.</p>

All user-created forms or customizations to the information queue form are preserved, but you won't be able to see them in runtime after you install the product updates. To see them in runtime by default, go to **Customization > Customize the System > Under Components**, click or tap **Entities**, and then expand the required entity (queues, in this case) and change the form order.

## Two service dashboards are hidden after the product updates have been installed.

Microsoft Dynamics CRM includes some default out-of-box dashboards. Some of these dashboards are related to the Service area which has been enhanced with this latest update.

The following dashboards have been updated:

- Customer Service Representative Social Dashboard
- Service Performance Dashboard

Your customizations to the dashboards are preserved, but the dashboards will be hidden after you have installed the product updates.

Users	Impact
<b>New Customers</b>	Two copies of the Customer Service Representative Social Dashboard and Service Performance Dashboard dashboards will be displayed in the customization area. Only the updated one will be visible in the runtime.
<b>Existing Customers</b>	A new copy of the Customer Service Representative Social Dashboard and Service Performance Dashboard dashboards will be added. Only the updated version will be visible in the runtime.

If you were using dashboards prior to installing the latest product update, you will notice that the new versions of these dashboards appear instead of the original versions. If you performed customizations on the original versions, your customizations have not been overwritten. You can find the previously existing dashboards within the Customization area.

If you had deleted either the Customer Service Representative Social Dashboard or the Customer Service Performance Dashboard, the new versions will appear when the latest product updates are installed.

All other default dashboards and any new custom dashboards will not be modified by this update.

Follow the steps below, if you want to restore dashboard versions used prior to installing the latest product updates.

1. On the nav bar, click **Microsoft Dynamics CRM**, and then click **Settings**.
2. Click **Settings**, and then click **Customization**.
3. Click **Customize the System**.
4. Click **Dashboards**.

Unless you had modified the name or description for the Customer Service Representative Social Dashboard and the Customer Service Performance Dashboard, they will appear with the same name and description as the new versions. If you cannot identify your customized version based on name or description, you can open each of them. Both of the new versions of these dashboards have the **Cases by SLA Status Over Week** chart in the upper-left corner.

5. Select the dashboard you want to re-add from the Dashboards list and then click **Save As**.
6. Click **Save**.
7. Verify the dashboard is now available from the Dashboards area.
8. If you do not want to keep a new version of the dashboard, it can be deleted within the Customization area. If you want to keep the dashboard but do not want it to appear to users, select the dashboard within the Customization area and click **Enable Security Roles**.
9. Select the **Display only to these selected security roles** radio button.
10. Click the checkmark in the column heading to remove the selection from all security roles and then click **OK**.

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## Customizations to the forms are affected by installing the product updates.

When you install the latest product updates, some existing forms will be modified. The forms that are modified are the form definitions that have the same name as the entity. For example: The Case entity by default has a form named Information, and a new form definition named Case was introduced with Microsoft Dynamics CRM 2013. Only the Case form definition is modified when installing the latest product updates.

The Account and Contact forms have been updated to include a sub-grid for Entitlements.

If you have customized any of the updated forms, depending on the specific customizations you have applied, you may see a **Conflicts** tab added to your form. In this tab you will find any fields where the customizations could not be automatically merged into the new layout. To address this, simply edit the form and drag the fields to where you want them to be. Then delete the **Conflicts** tab.

Any custom forms you created will not be modified after installing the product updates.

When you add new elements to a form that is to be merged, we recommend that you include your new elements within new container elements (tabs or sections). Additions to any container will be appended to the end of the container. For example, fields added to a section will be positioned at the end of the section. It is expected that a customizer installing a solution will then modify the form to re-arrange elements after it is installed. If none of the form elements have been updated out-of-box in CRM Spring '14 update, customizations will be preserved. More information: [Understand how managed solutions are merged](#)

## Customizations to out-of-box command bar buttons on the case and queue item forms are overwritten, after the product updates have been installed.

In CRM Spring '14 update, the Queue items command bar has new buttons added, some existing behavior modified.

If you have customized any of out-of-box command bar actions listed below, the customizations will be overwritten.

- ▶ On the Case form, the Assign and Add to Queue command bar buttons.
- ▶ On Queue item grid, Queue Item details command bar button.
- ▶ On Queue item grid, actions Work On, Release, Remove and Routing.

The table below compares the Queue Item behavior before and after you install the product updates.

CRM 2013/ CRM Online Fall '13	CRM Spring '14 update	After product updates are installed
Routing	Route	Route will be shown and Routing is hidden.



<b>Work On</b>	Pick	Pick will be shown and Work On is hidden.
<b>Release</b>	Release	Only behavior change occurs.
<b>Remove</b>	Remove	No change

[Ribbon customization](#): Use of RibbonDiffXml to add, remove, or hide ribbon elements is supported. Reuse of Ribbon commands defined by Microsoft Dynamics CRM is supported; however, we reserve the right to change or deprecate the available commands. Reuse of JavaScript functions defined within ribbon commands is not supported.

If you have customized the above mentioned command bar actions, you can re-instate your customizations by using [Ribbon Workbench for Microsoft Dynamics CRM](#). You can also re-apply the backed up solution that modified the command bar buttons, to target the customizations you would like to preserve, after installing product updates.

All command bar buttons added by the customer will follow the CRM Spring '14 update sequence and the additions will be preserved at customer defined order.

For new CRM Online Spring '14 signups, full CRM Online Spring '14 behavior will be provided with no customization impact.

## Customizations to the Queues tile in the service area are lost, after the product updates have been installed.

In the CRM Spring '14 update, the Queue Item entity (navigation tile label is Queues) has been modified in the sitemap.xml to enable it for Microsoft Dynamics CRM for tablets (MoCA) and therefore any customizations done to the Queues tile within the sitemap will be overwritten after installing product updates.

If you have customized the Queues tile, you must perform Queues tile specific site map changes in the sitemap.xml and reimport it via solution to re-instate your customizations:

1. Modify the solution which introduced the change to the Queues tile. Ensure the solution is targeted for the Queues tile only.
2. To preserve the CRM Spring '14 update which enables Queue Items tile in CRM for tablets, add **Entity="queueitem"** in the customizations.xml to the **SubArea Id="nav\_queues"** node that contains your entry for the Queues entity.
3. If you didn't change the out-of-box behavior for the Queues entity, your sitemap modification will look like this:

```
<SubArea Id="nav_queues" ResourceId="Homepage_Queues" Entity="queueitem"
DescriptionResourceId="Queues_SubArea_Description" Icon="/_imgs/ico_18_2020.gif"
Url="/_root/homepage.aspx?etc=2029" GetStartedPanePath="Queues_Web_User_Visor.html"
GetStartedPanePathAdmin="Queues_Web_Admin_Visor.html"
GetStartedPanePathOutlook="Queues_Outlook_User_Visor.html"
GetStartedPanePathAdminOutlook="Queues_Outlook_Admin_Visor.html"><Privilege Entity="queue"
Privilege="Read" /> </SubArea>
```

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More information: [Edit the Site Map](#)

## In CRM for tablets, the Queue Items tile is not visible in the nav bar, after the product updates have been installed.

Applicable to customers who have installed product updates as part of the upgrade process from Microsoft Dynamics CRM December 2012 Service Update or Microsoft Dynamics CRM 2011 Update Rollup 12 to Microsoft Dynamics CRM 2013 Service Pack 1 or Microsoft Dynamics CRM Online Spring '14.

In the CRM Spring '14 update, the Queue Item entity has been modified in the sitemap.xml to enable it for Microsoft Dynamics CRM for tablets (MoCA). Per the out-of-box behavior in the web client, you will continue to see the Queue Item entity (the navigation tile label is Queues) under **Workplace > My work** or at another location per your sitemap customization, though Queue Items tile will not be visible for the same organization configured for CRM for tablets.

To enable Queue Items in CRM for tablets, you must perform changes in the sitemap.xml and reimport it via solution.

The modifications to the sitemap.xml require adding Entity="queueitem" in the customizations.xml to the node that contains your entry for the Queues entity.

If you don't change the out-of-box behavior for the Queues entity (under **Workplace > My work**), your sitemap modification will look like this:

```
<SubArea Id="nav_queues" Icon="/_imgs/ico_18_2020.gif" Url="/_root/homepage.aspx?etc=2029"
ResourceId="Homepage_Queues" Entity="queueitem" DescriptionResourceId="Queues_SubArea_Description"
GetStartedPanePath="Queues_Web_User_Visor.html"
GetStartedPanePathAdmin="Queues_Web_Admin_Visor.html"
GetStartedPanePathOutlook="Queues_Outlook_User_Visor.html"
GetStartedPanePathAdminOutlook="Queues_Outlook_Admin_Visor.html"><Privilege Entity="queue"
Privilege="Read" /> </SubArea>
```

More information: [Edit the Site Map](#)

## Feedback

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