

Travel Insurance and Registration System (TIRS)

Fundamentals

Version 1.0

Contents

1	Appearance	3
1.1	Logging in / Accessing the System	3
1.2	Using Microsoft Dynamics	3
1.2.1	The Navigation Bar	3
1.2.2	The Command Bar	5
1.3	The Dashboard	5
1.4	Forms (Travel Insurance Applications).....	5
1.5	Editing and Exporting Data	7
1.5.1	Export Data	7
1.5.2	Bulk Editing **	8
1.6	Options.....	9
1.6.1	Setting your Home Screen	9
1.6.2	Records Per Page	11
1.6.3	Advanced Find Settings.....	11
1.6.4	Formats	12
1.7	Hints and Tips.....	13

1 Appearance

1.1 Logging in / Accessing the System

Access the system here: <https://production.dynamics.ox.ac.uk> and log in with your SSO credentials.

How to login to CRM



1.2 Using Microsoft Dynamics


Navigation and performing data functions in Microsoft Dynamics is primarily achieved through the use of the 'Navigation' and 'Command' bars.



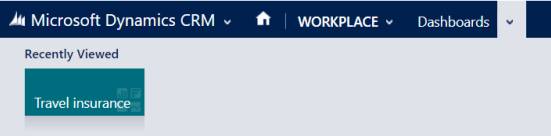
1.2.1 The Navigation Bar



The Navigation Bar located at the top of the screen. It is split into two parts. The left-hand side pertains to the existing information held within the application. The right-hand side is to do with setting personal preferences, performing searches and adding new data to the information already within the database.

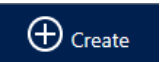




The Left-hand Side

	Clicking on this button will activate a drop-down menu displaying a number of tiles. Clicking on these tiles will take you to the relevant records work-space.
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	<p>The 'Home' button will instantly take the user to the Workplace screen (usually a dashboard, but this can be changed in user preferences.).</p>
	<p>Any subsequent options on the left-hand side of the navigation bar will be context sensitive to the work-space tile chosen.</p> <p>To the very right of the 'Home' button will be the name of the work-space chosen –'WORKPLACE' in this example.</p> <p>Selecting this option will present a drop-down menu of tiles relevant to that chosen work-space.</p>
	<p>The final left-hand side button ('Dashboards' in this example) activates a drop-down menu of recently viewed tiles relevant to the chosen work-space.</p>

The Right-hand Side



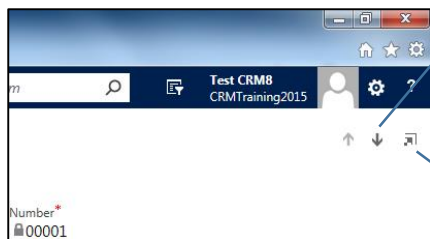
	<p>The 'quick create' button enables the fast creation of records. This option is only available for work-spaces that have been setup to include this functionality.</p>
	<p>The 'quick search box' is very powerful. It will search for the characters entered, producing tiles on the main screen. Simply clicking on a tile will take the user to that part of the database.</p>
	<p>The 'Advanced Find' button enables the user to specify a number of criteria in locating information within Microsoft Dynamics. (See Error! eference source not found.)</p>
	<p>The settings button allows the user to personalise Microsoft Dynamics. (See 1.6)</p>
	<p>The help button provides you with typical Microsoft help functionality in the form of a searchable user guide.</p>

★ Active Insurance Applications ▾

Search for records

✓ Name Trip	Traveller	Start Date	End Date	Created On	Modified On	Department	Division (Department)	Status Reason
Integration Test Application - Create - One Record	Integration Test Application - Create ...			04/06/2018 13:25	04/06/2018 13:25			Submitted
Integration Test Application - Create - One Record	Integration Test Application - Create ...			04/06/2018 13:25	04/06/2018 13:25			Submitted
Integration Test Application - Create - Ownership	Integration Test Application - Create ...	04/09/2018		04/06/2018 13:25	04/06/2018 13:25			Submitted
Integration Test Application - Create - Ownership	Integration Test Application - Create ...			04/06/2018 13:24	04/06/2018 13:24			Submitted
KS - TESTING FORGERY	Jane TESTER KS - TESTING FORGERY	12/06/2018	30/06/2018	30/05/2018 15:57	30/05/2018 16:14	Music	Humanities	Approved
Integration Test Application - Create	Integration Test Application - Create ...	30/08/2018	30/09/2018	30/05/2018 15:04	30/05/2018 15:04			Submitted
Integration Test Application - Create	Integration Test Application - Create ...	30/08/2018	30/09/2018	30/05/2018 15:04	30/05/2018 15:04			Submitted
Integration Test Application - Create - One Record	Integration Test Application - Create ...			30/05/2018 15:04	30/05/2018 15:04			Submitted
Integration Test Application - Create - One Record	Integration Test Application - Create ...			30/05/2018 15:04	30/05/2018 15:04			Submitted
Integration Test Application - Create - Ownership	Integration Test Application - Create ...			30/05/2018 15:03	30/05/2018 15:03			Submitted
Integration Test Application - Create	Integration Test Application - Create ...	30/08/2018	30/09/2018	30/05/2018 11:46	30/05/2018 11:46			Submitted
Integration Test Application - Create	Integration Test Application - Create ...	30/08/2018	30/09/2018	30/05/2018 11:46	30/05/2018 11:46			Submitted
Integration Test Application - Create - One Record	Integration Test Application - Create ...			30/05/2018 11:46	30/05/2018 11:46			Submitted
Integration Test Application - Create - One Record	Integration Test Application - Create ...			30/05/2018 11:46	30/05/2018 11:46			Submitted
Integration Test Application - Create - Ownership	Integration Test Application - Create ...			30/05/2018 11:45	30/05/2018 11:45			Submitted
Integration Test Application - Create	Integration Test Application - Create ...	23/08/2018	23/09/2018	23/05/2018 14:43	23/05/2018 14:43			Submitted
Integration Test Application - Create	Integration Test Application - Create ...	23/08/2018	23/09/2018	23/05/2018 14:43	23/05/2018 14:43			Submitted
Integration Test Application - Create - One Record	Integration Test Application - Create ...			23/05/2018 14:43	23/05/2018 14:43			Submitted
Integration Test Application - Create - One Record	Integration Test Application - Create ...			23/05/2018 14:42	23/05/2018 14:42			Submitted
Integration Test Application - Create - Ownership	Integration Test Application - Create ...			23/05/2018 14:42	23/05/2018 14:42			Submitted
KS - saving details only	Jane otss0284 KS - saving details only	01/06/2018	02/06/2018	22/05/2018 14:01	22/05/2018 14:01			Draft
KS - registering travel deets test	Jane otss0284 KS - registering travel ...	01/06/2018	02/06/2018	22/05/2018 13:53	22/05/2018 13:54	Food Technology	UAS	Approved
KS - reg details test	Jane otss0284 KS - reg details test	02/06/2018	02/06/2018	22/05/2018 13:53	22/05/2018 13:53			Draft

By double clicking on a particular part of that record a form/travel insurance application will open.



You can move through other records in the list by clicking on the previous or next record button.
*The Records available via these buttons will be inherited from whatever view or filtering you have currently applied.

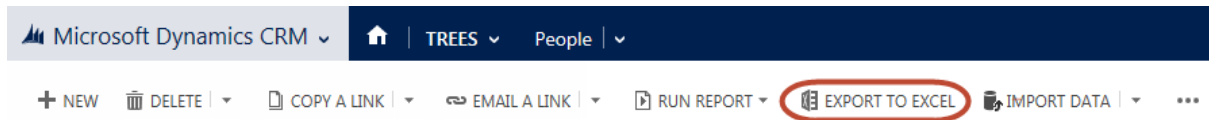
The opened form will fill the whole work area. To pop out the form into its own window, click on the form 'pop-out button' in the top right corner of the work area.

A form/travel will generally comprise several input fields. These represent the fields the traveller/proxy input in the TIRS front end/Web App when creating the travel insurance application. Whenever a new application is created on the front end, it will be visible in CRM. As an application has a lot of information, it has been split out into sections (replicating the tabs in the front end) and those sections can be collapsed from view by clicking on that section's title.

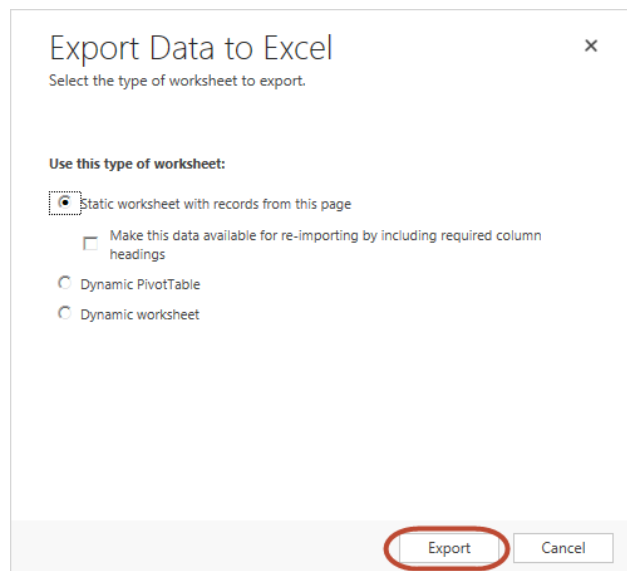
1.5 Editing and Exporting Data

1.5.1 Export Data

You can export data from Microsoft Dynamics to Microsoft Excel by clicking on the 'EXPORT TO EXCEL' option in the command bar of any work-space from which you wish to export data.

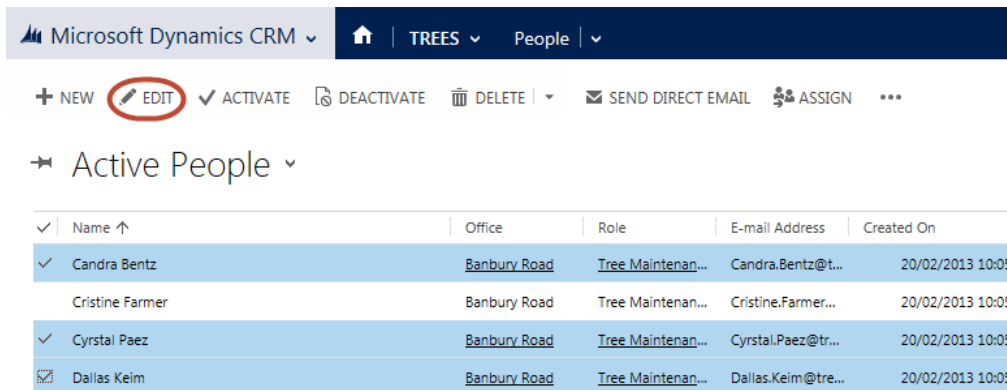


- This will bring up the 'Export Data to Excel' window. From here you can specify the type of spreadsheet you wish to export and when you have made this selection you can simply click 'Export' to export.



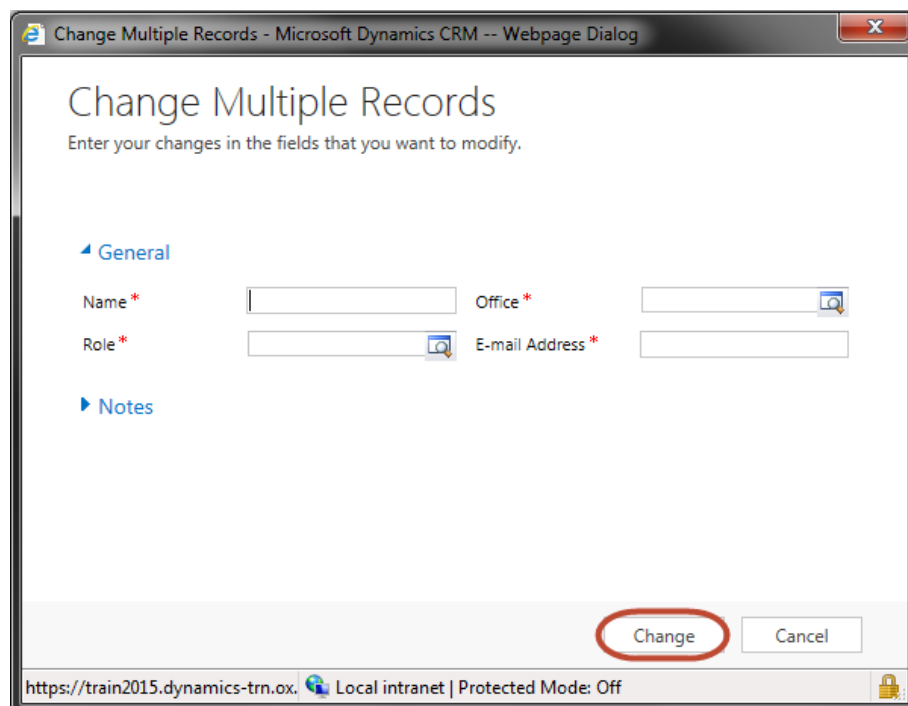
1.5.2 Bulk Editing **

- **While this is functional, I have not used or tested it. Recommend not using until tested.
- To bulk edit in Microsoft Dynamics, hover over 'Microsoft Dynamics CRM' in the Navigation Bar and select the 'Travel Insurance' tile. This will bring up the Active Insurance Application view (or a view personalised view if you have chosen to do that). Select the records that you wish to edit by checking the tick next to each of them.
- Then click the 'EDIT' button in the 'Command Bar'.



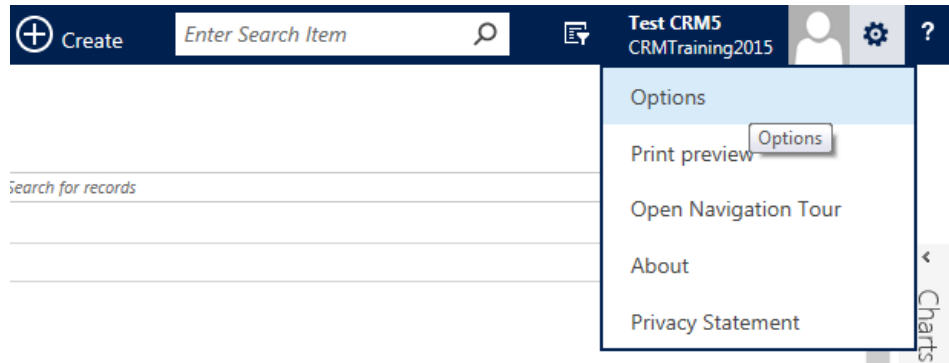
This will bring up the 'Change Multiple Records' window.

- From here you can specify the data you wish to enter into the fields and when you are done, click the 'Change' button to apply those changes to the selected records.



1.6 Options

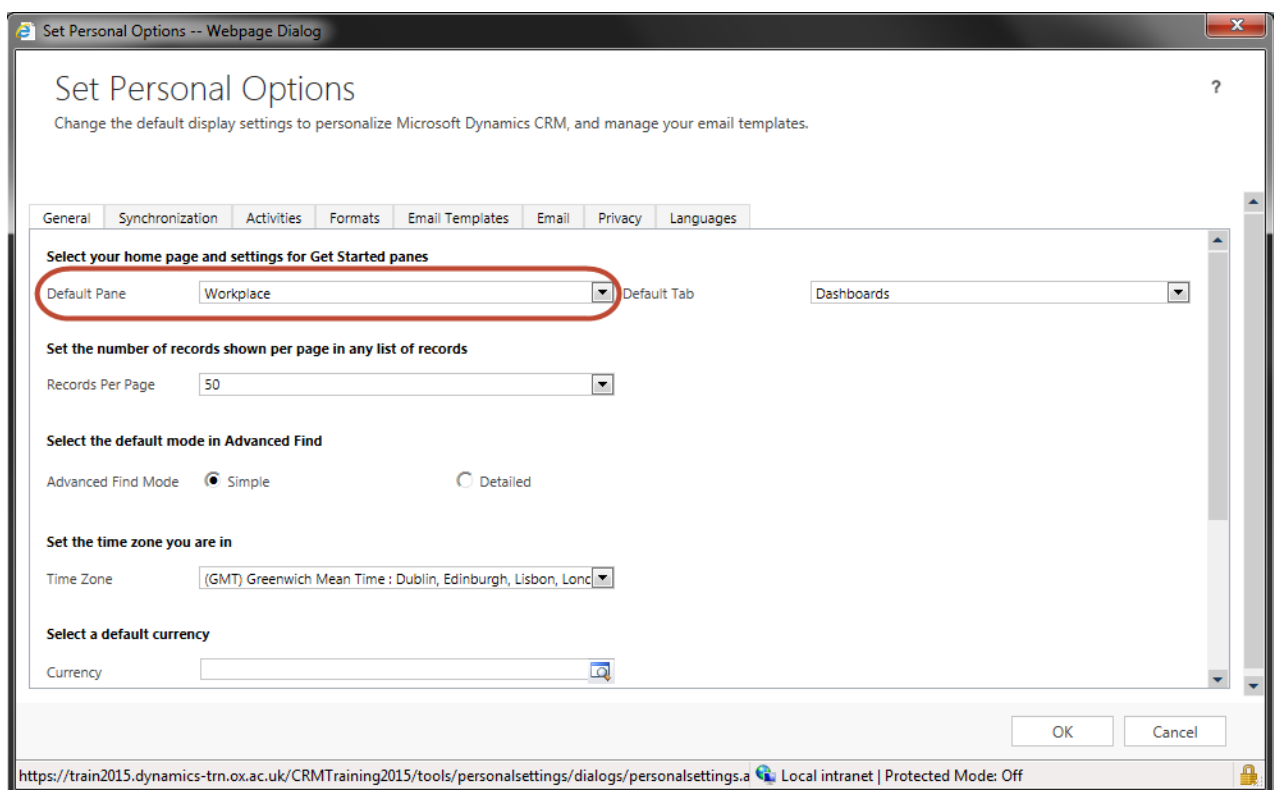
- The options menu can be found by navigating to the top right-hand corner of the navigation bar and by clicking on the 'Settings' button (cog) to activate the settings drop-down menu.
- Then select the 'Options' option from the drop-down menu.



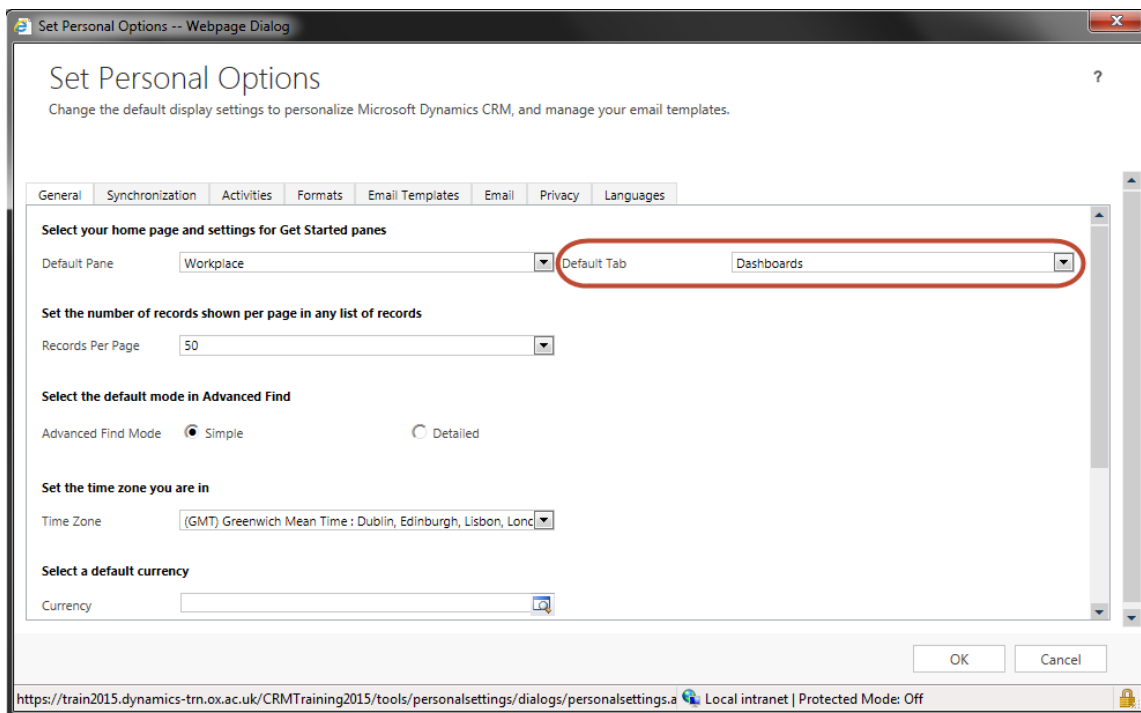
1.6.1 Setting your Home Screen

From the options menu you can set your default Home screen.

- On the 'General' tab, clicking on the 'Default Pane' drop-down menu will allow you to select what work-space you would like your home screen to be set in.



- After you selected the work-space you can click on the 'Default Tab' drop-down menu to select what Dashboard or View you would like your Home screen to take the form of.



Set Personal Options
Change the default display settings to personalize Microsoft Dynamics CRM, and manage your email templates.

General Synchronization Activities Formats Email Templates Email Privacy Languages

Select your home page and settings for Get Started panes

Default Pane: Workplace Default Tab: Dashboards

Set the number of records shown per page in any list of records

Records Per Page: 50

Select the default mode in Advanced Find

Advanced Find Mode: ☒ Simple ☐ Detailed

Set the time zone you are in

Time Zone: (GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, Lond

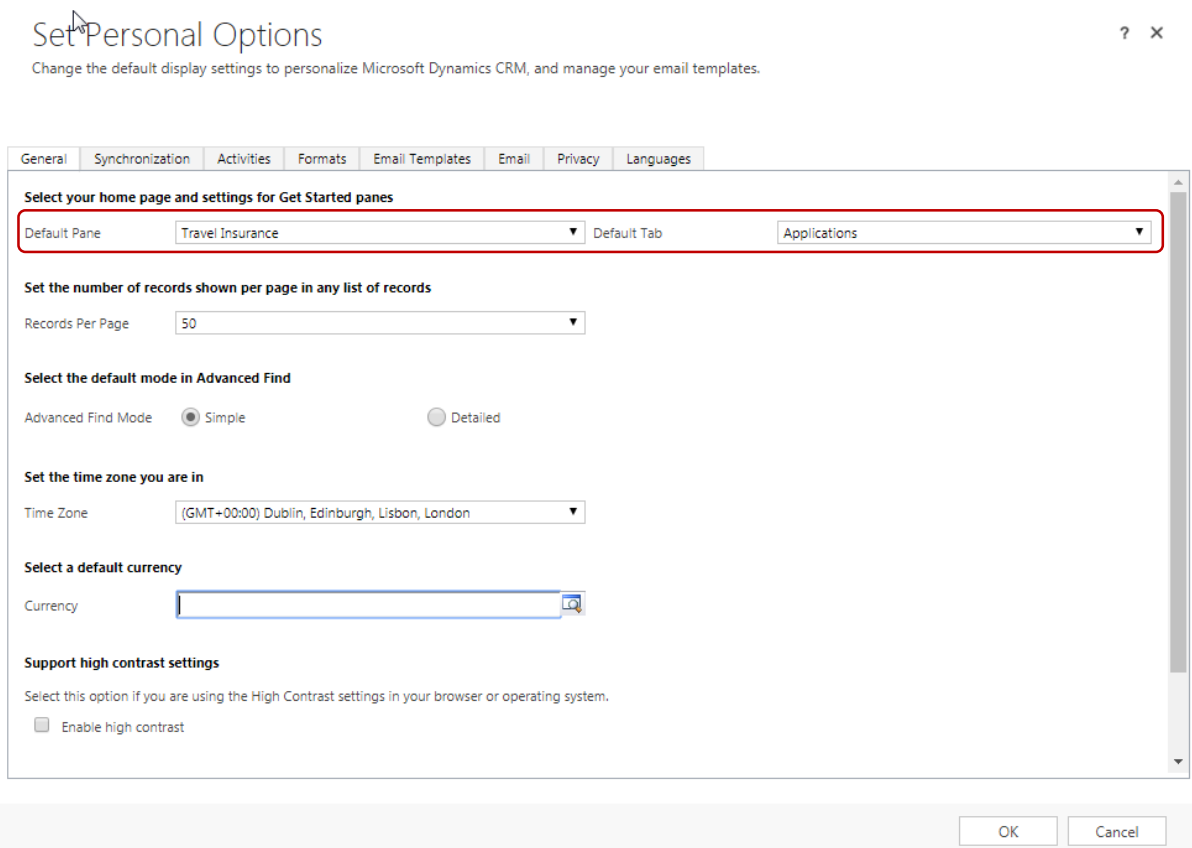
Select a default currency

Currency: [Empty field]

OK Cancel

https://train2015.dynamics-trn.ox.ac.uk/CRMTraining2015/tools/personalsettings/dialogs/personalsettings.a Local intranet | Protected Mode: Off

- You can also elect to have your default view be a 'View' of Travel Insurance Applications. For example, if you want your default view (what you see when you log in) to be a list of all active travel insurance applications, set your options as below.



Set Personal Options
Change the default display settings to personalize Microsoft Dynamics CRM, and manage your email templates.

General Synchronization Activities Formats Email Templates Email Privacy Languages

Select your home page and settings for Get Started panes

Default Pane: Travel Insurance Default Tab: Applications

Set the number of records shown per page in any list of records

Records Per Page: 50

Select the default mode in Advanced Find

Advanced Find Mode: ☒ Simple ☐ Detailed

Set the time zone you are in

Time Zone: (GMT+00:00) Dublin, Edinburgh, Lisbon, London

Select a default currency

Currency: [Empty field]

Support high contrast settings

Select this option if you are using the High Contrast settings in your browser or operating system.

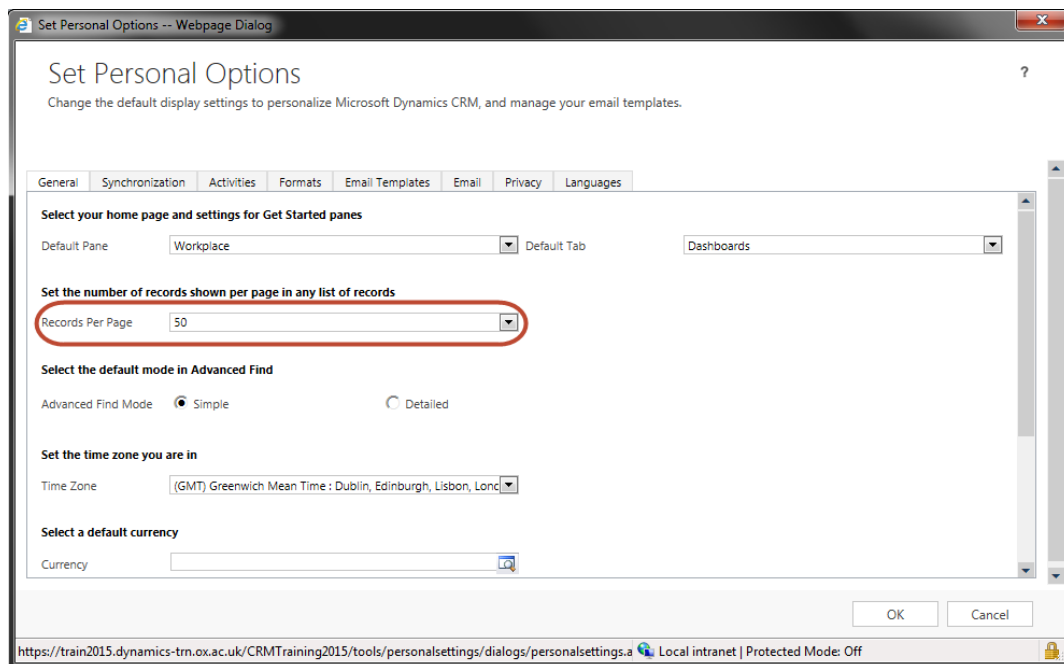
☐ Enable high contrast

OK Cancel

- Once you have the settings the way you want them, click 'OK' in the bottom right-hand corner of the 'Options Window' to save them.

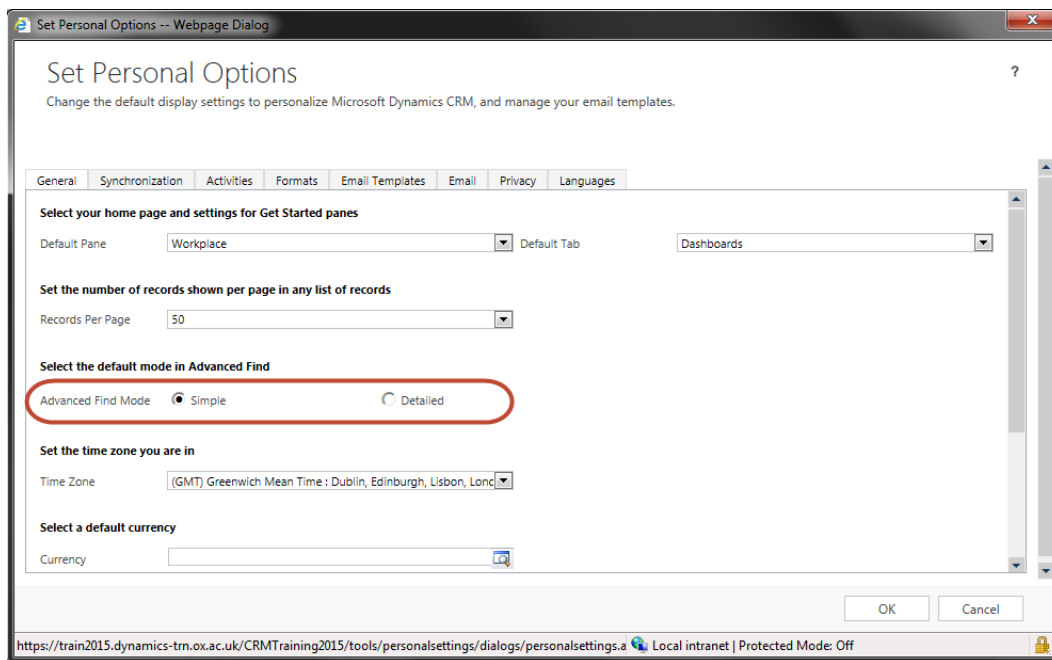
1.6.2 Records Per Page

On the 'General' tab, to change the number of records shown per page in any list of records, select your preference from the 'Records Per Page' drop-down menu and click 'OK' in the bottom right-hand corner of the window to apply the setting.



1.6.3 Advanced Find Settings

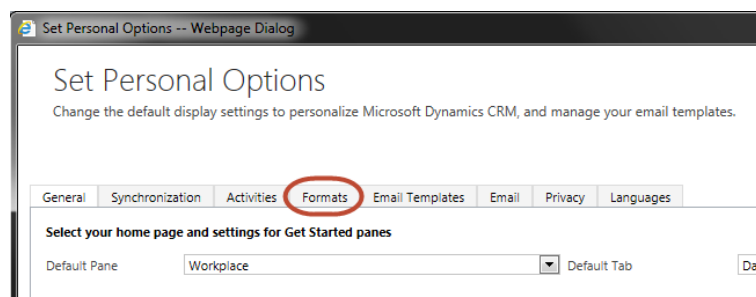
On the 'General' tab, the 'Advanced Find Mode' radio buttons allow you to toggle between the 'Simple' and 'Detailed' views when using the 'Advanced Find' function in Microsoft Dynamics (Refer to the TIRS Views and Advanced Find QRG).



The 'Detailed' mode will allow you to click select to specify further search criteria whereas the 'Simple' mode will not (See **Error! Reference source not found.**).




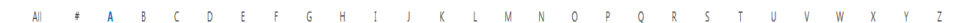


1.6.4 Formats

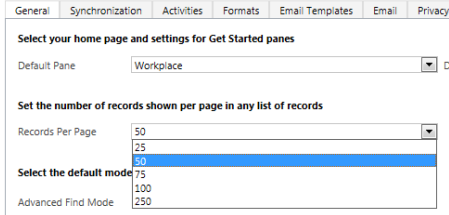


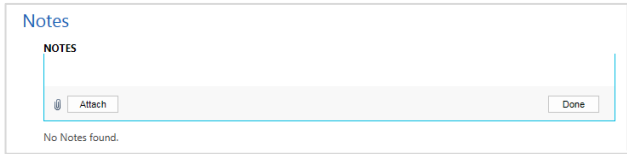


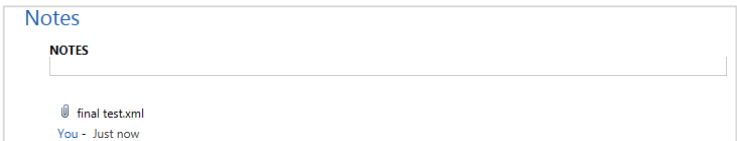
By clicking on the 'Formats' tab you will be able to set the formats by which the: numbers, times, currencies and dates appear. Clicking 'OK', will apply these settings.



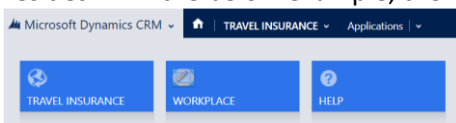
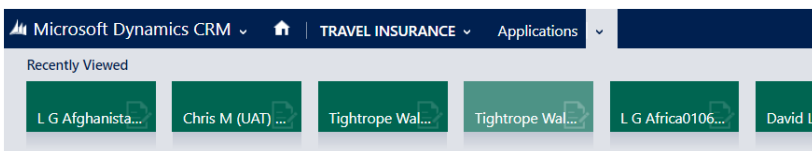
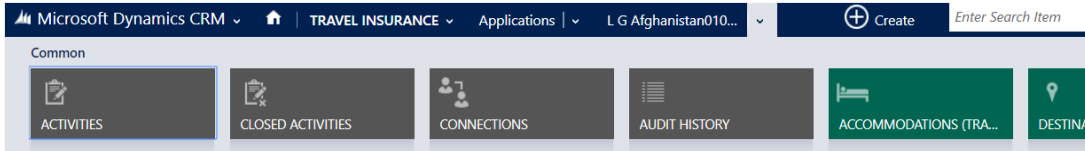


1.7 Hints and Tips

Like most applications, MS Dynamics has some specific features. This hints and tips section provides guidance to ensure ease of use. Please read this section for awareness.

Feature	Guidance
Save	<p>Save can be actioned using any of the following options:</p> <ul style="list-style-type: none">• The save button in the bottom right corner of a form • Ctrl + S•  option on the command bar
Searching	<p><i>The Search Box</i></p> <p></p> <p>The 'Search Box' is available in various places within MS Dynamics. It can assist with reducing displayed lists and searching for data for using input fields.</p> <p>The * wildcard can be used within the search field. For example:</p> <ul style="list-style-type: none">*sal will find all entries which include the letters sal within the text*History will find all entries that include the word History <p><i>The Alpha Bar</i></p> <p></p> <p>When you select a list view, the 'alpha bar' will be positioned at the bottom of the list. Click on the appropriate letter to reduce the list to a particular alpha selection.</p> <p> Note: For list view displays, the alpha bar search focuses on the highlighted column. If the column you wish to search within is not highlighted, click on the column heading. (This will also reorder the column into alpha order, clicking again will reorder in reverse alpha order.)</p>
Mandatory Fields	<p>Mandatory fields are marked with a *.</p> <p></p> <p>If you attempt to save a form where all mandatory fields are not completed an error message will appear.</p>

Feature	Guidance
Number of Rows on a Form	<p>The default number of rows displayed on a form in list view is 50. This can be adjusted:</p> <ul style="list-style-type: none"> Click on the 'Settings' button on the 'Navigation Bar'. Click on 'Options' from the drop-down list. From the <i>General</i> tab of the <i>Set Personal Options</i> dialogue box click on the drop-down arrow next to <i>Records Per Page</i> and select the number of rows you wish to appear.  <ul style="list-style-type: none"> Click on the  button.
Refresh	To refresh a form select the [F5] key.
Notes sections	<p>A notes section is located at the bottom of forms within MS Dynamics for free text entries.</p> <p> Warning: For Data Protection Act and security reasons, take care if using this functionality. Any information recorded in this area will be viewable by all users whom have access to the record. Also, please note that text added here will not be inserted into email notifications automatically.</p> 
Attachments	<p>Documents, can be attached to the <i>Notes</i> section by clicking on the  Attach button in the <i>Notes</i> section of a form. Click on browse to find the file, once the file is located and opened, click on <i>Done</i> to attach it:</p>  <p>The file can be accessed through the <i>Notes</i> section as shown below:</p> 

Feature	Guidance																																																																																																												
Look up Fields	<p>To look up a field within a form there are two ways in which you can do it:</p> <ul style="list-style-type: none">Type in as much of the search item as you can and press the down arrow: <div></div> <ul style="list-style-type: none">Click on the  icon to return a list of results that match your search criteria.																																																																																																												
Recently Viewed	<p>The Recently viewed functionality provides an alternative to having to locate recently opened forms manually.</p> <ul style="list-style-type: none">Using the <i>Navigation Bar</i>, navigate to the type of work tile that the application resides in. In the below example, the <i>‘Travel Insurance’</i> tile. <div></div> <ul style="list-style-type: none">Clicking the down arrow at the end of the left-hand side of the ‘Navigation bar’ will provide a drop-down menu of recently viewed records/views in the form of tiles. <div></div>																																																																																																												
Audit History	<p>Each work-space within MS Dynamics has an audit history which can be found by clicking the down arrow at the end of the left-hand side of the ‘Navigation bar’ within the form, and selecting the ‘Audit History’ tile.</p> <div></div> <p>This will bring up the audit history of the selected work-space:</p> <div><p>INSURANCE APPLICATION : INFORMATION</p><p>L G Afghanistan010518</p><p>Audit History</p><p>Filter on: All Fields</p><table><tr><th>Changed Date</th><th>Changed By</th><th>Event</th><th>Changed Field</th><th>Old Value</th><th>New Value</th></tr><tr><td>05/06/2018 16:54</td><td>Kathy Shaw</td><td>Update</td><td>First Name</td><td>L</td><td>L</td></tr><tr><td></td><td></td><td></td><td>Last Name</td><td>G</td><td>G</td></tr><tr><td></td><td></td><td></td><td>Traveller</td><td>L G Afghanistan010518</td><td>L G Afghanistan010518</td></tr><tr><td></td><td></td><td></td><td>Traveller Name</td><td>L G</td><td>L G</td></tr><tr><td>05/06/2018 16:54</td><td>Kathy Shaw</td><td>Update</td><td>First Name</td><td>L</td><td>L</td></tr><tr><td></td><td></td><td></td><td>Last Name</td><td>G</td><td>G</td></tr><tr><td></td><td></td><td></td><td>Traveller</td><td>Afghanistan010...</td><td>L G Afghanistan010518</td></tr><tr><td></td><td></td><td></td><td>Traveller Name</td><td>L G</td><td>L G</td></tr><tr><td>25/04/2018 14:30</td><td>crmtraining21 Insur...</td><td>Update</td><td>Status Reason</td><td>Awaiting Referral Response</td><td>Referral – Insurance Available</td></tr><tr><td>25/04/2018 14:29</td><td>crmtraining21 Insur...</td><td>Update</td><td>Status Reason</td><td>Referred to Insurance Team</td><td>Awaiting Referral Response</td></tr><tr><td>✓ 25/04/2018 14:27</td><td>crmtraining21 Insur...</td><td>Update</td><td>Status Reason</td><td>Submitted for Referral</td><td>Referred to Insurance Team</td></tr><tr><td>25/04/2018 11:34</td><td>Service MSDynamic...</td><td>Update</td><td>Email Application Rej...</td><td></td><td></td></tr><tr><td>25/04/2018 11:34</td><td>Service CRM 2015 ...</td><td>Update</td><td>Additional Information</td><td></td><td></td></tr><tr><td></td><td></td><td></td><td>Address City</td><td></td><td></td></tr><tr><td></td><td></td><td></td><td>Alternate Email</td><td></td><td></td></tr><tr><td></td><td></td><td></td><td>How is Trip Funded</td><td></td><td>Departmental funding</td></tr><tr><td></td><td></td><td></td><td>Level of Risk</td><td></td><td>Medium</td></tr></table></div>	Changed Date	Changed By	Event	Changed Field	Old Value	New Value	05/06/2018 16:54	Kathy Shaw	Update	First Name	L	L				Last Name	G	G				Traveller	L G Afghanistan010518	L G Afghanistan010518				Traveller Name	L G	L G	05/06/2018 16:54	Kathy Shaw	Update	First Name	L	L				Last Name	G	G				Traveller	Afghanistan010...	L G Afghanistan010518				Traveller Name	L G	L G	25/04/2018 14:30	crmtraining21 Insur...	Update	Status Reason	Awaiting Referral Response	Referral – Insurance Available	25/04/2018 14:29	crmtraining21 Insur...	Update	Status Reason	Referred to Insurance Team	Awaiting Referral Response	✓ 25/04/2018 14:27	crmtraining21 Insur...	Update	Status Reason	Submitted for Referral	Referred to Insurance Team	25/04/2018 11:34	Service MSDynamic...	Update	Email Application Rej...			25/04/2018 11:34	Service CRM 2015 ...	Update	Additional Information						Address City						Alternate Email						How is Trip Funded		Departmental funding				Level of Risk		Medium
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