

Travel Insurance and Registration System (TIRS)

Fundamentals

Version 1.0

Contents

1	Appearance								
	1.1	Logging	g in / Accessing the System3						
	1.2	Using N	Aicrosoft Dynamics						
		1.2.1	The Navigation Bar						
		1.2.2	The Command Bar5						
	1.3	The Da	shboard5						
	1.4	Forms	(Travel Insurance Applications)5						
	1.5	Editing and Exporting Data							
		1.5.1	Export Data						
		1.5.2	Bulk Editing **						
	1.6	Option	s						
		1.6.1	Setting your Home Screen						
		1.6.2	Records Per Page11						
		1.6.3	Advanced Find Settings11						
		1.6.4	Formats						
	1.7	Hints a	nd Tips13						

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

📶 Microsoft Dynamics CRM 🗸 👘 📋	WORKPLACE - Dashboards -
Microsoft Dynamics CRM ~	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.

f	The 'Home' button will instantly take the user to the Workplace screen (usually a dashboard, but this can be changed in user preferences.).
WORKPLACE ~	Any subsequent options on the left-hand side of the navigation bar will be context sensitive to the work- space tile chosen. To the very right of the 'Home' button will be the name of the work-space chosen –'WORKPLACE' in this example. Selecting this option will present a drop-down menu of tiles relevant to that chosen work-space.
Microsoft Dynamics CRM MORKPLACE Dashboards Travel insurance	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.

The Right-hand Side

Cre	eate Enter Search Item O Test CRM8 CRMTraining2015 CRMTraining2015
Create	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.
Enter Search Item 🔎	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.
F	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.)
\$	The settings button allows the user to personalise Microsoft Dynamics. (See 1.6)
?	The help button provides you with typical Microsoft help functionality in the form of a searchable user guide.

1.2.2 The Command Bar

SAVE AS 📑 NEW 🛛 REFRESH ALL

This is located underneath the Navigation Bar. The buttons it displays are functions relevant to the selected work-space ('WORKPLACE' > Dashboard in the above example).

1.3 The Dashboard

The dashboard is the default point-of-entry for MS Dynamics. It is located by clicking on the 'Microsoft Dynamics' button on the 'Navigation Bar' and selecting the 'WORKPLACE' tile. Alternatively, the 'Home' button on the Navigation Bar will navigate to the Workplace area, and accordingly to the dashboard.

Using the CRM Dynamics functionality, it can be personalised to display data related to your area of work. Dashboards can also be shared with other users and teams.

The default Travel Insurance dashboard is pictured below. Please refer to the TIRS Get the data you Need QRG for more information on Dashboards:



1.4 Forms (Travel Insurance Applications)

The main area within the application window will display lists of data. The example below shows one such list.

★ Active Insurance Applications ×

~	Name Trip	Traveller	Start Date	End Date	Created On ψ	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.

Search for records

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'.

Au N	Microsoft Dynamics CRM 🗸 🏦 TREES 🗸 People 🗸											
🕂 NEW 🖉 EDIT) 🗸 ACTIVATE 🔓 DEACTIVATE 🏾 🗰 DELETE 🖙 🔤 SEND DIRECT EMAIL 🔹 ASSIGN 🛛 🚥												
¥	Active People ~											
\sim	Name 🛧	Office	Role	E-mail Address	Created On							
~	Candra Bentz	Banbury Road	Tree Maintenan	Candra.Bentz@t	20/02/2013 10:05							
	Cristine Farmer	Banbury Road	Tree Maintenan	Cristine.Farmer	20/02/2013 10:05							
~	Cyrstal Paez	Banbury Road	Tree Maintenan	Cyrstal.Paez@tr	20/02/2013 10:05							
Ø	Dallas Keim	Banbury Road	Tree Maintenan	Dallas.Keim@tre	20/02/2013 10:05							

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.

🧿 Change Multiple Re	cords - Microsoft Dynamics CF	RM Webpage Dialo	g	x						
Change Multiple Records Enter your changes in the fields that you want to modify.										
General										
Name *		Office *		Q						
Role*	Q	E-mail Address *								
► Notes										
		C	Change	Cancel						
https://train2015.dynan	nics-trn.ox. 육 Local intranet	Protected Mode: Off		A .						

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.

🕀 Create	Enter Search Item	Q	F	CRMTraining2015	?
				Options	
				Print preview Options	
Search for records				Open Navigation Tour	
				About	<
				Privacy Statement	Charl

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.

Set Personal Options	Webpage Dialog							x
Set Persor	al Options						?	,
Change the default di	splay settings to personalize N	licrosoft Dynamic	s CRM, and manage	e your email temp	lates.			
General Synchronizat	on Activities Formats	Email Templates	Email Privacy	Languages				
Select your home page	and settings for Get Started pa	nes					1	
Default Pane	Workplace		💌 Defai	ult Tab	Dashboards		•	
Records Per Page	ds shown per page in any list	or records	-					
Records Per Page	50							
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Advanced Find Mode	Simple	C Detaile	d					
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Time Zone	(GMT) Greenwich Mean Time : D	ublin, Edinburgh, Li	sbon, Lonc 💌					
Select a default current	y							
Currency			Q					
						ОК	Cancel	
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• 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.

Select your home page and settings for Get Started panes Default Pane Workplace Set the number of records shown per page in any list of records Records Per Page S0 Select the default mode in Advanced Find Advanced Find Mode Set the time zone you are in Time Zone (GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, Lonc Select a default currency	Set Personal Option	ns Webpage Dialog	->
Change the default display settings to personalize Microsoft Dynamics CRM, and manage your email templates. General Synchronization Activities Formats Email Templates Email Privacy Languages Setect your home page and settings for Get Started panes Default Pane Workplace Default Pane Workplace Set the number of records shown per page in any list of records Records Per Page 50 Setect 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, Lone Setect a default currency Currency	Set Perso	onal Options	?
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Select your home page and settings for Get Started panes Default Pane Workplace 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, Lonc Select a default currency Currency Image: Contract of the contract of the contract of the contract of the currency of the currencurency of the currency of the currency of th			
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Select a default currency Currency	Set the time zone y	ou are in	
Currency	Time Zone	(GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, Lonc	
	Select a default cur	rency	
OK Cancel	Currency		•
OK Cancel			and a
s://train2015.dynamics-trn.ox.ac.uk/CRMTraining2015/tools/personalsettings/dialogs/personalsettings.a ፍ Local intranet Protected Mode: Off			cei

• 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.

? X

Set®Personal Options

eneral	Synchronizat	ion Activities	Formats	Email Templates	Email	Privacy	Languages		
elect yo	ur home page	and settings for	Get Started	panes					
efault Pa	ane	Travel Insurance				▼ De	fault Tab	Applications	 •
t the n	umber of reco	rds shown per pa	age in any lis	t of records					
acords F	er Page	50				۲			
alact th	a default med	e in Advanced Fi							
			na						
ovanceo	Find Mode	Simple		🔵 Detai	ied				
et the ti	me zone you a	are in							
me Zon	e	(GMT+00:00) D	ublin, Edinbur	gh, Lisbon, London		¥			
elect a d	lefault currend	сy							
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	high contrast s	-							
	s option if you a ble high contra		Contrast set	tings in your browser	or operat	ting system.			
	ble nigh contra	151							

• 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.

Set Personal Options	Webpage Dialo	9									×
Set Personal Options ? Change the default display settings to personalize Microsoft Dynamics CRM, and manage your email templates.											
General Synchroniza	tion Activities	Formats	Email Templates	Email	Privacy	Languages					-
Select your home pag	e and settings for	Get Started J	panes							-	
Default Pane	Workplace				 Defa 	ult Tab	Dashboards		•		
Set the number of rec Records Per Page Select the default mor Advanced Find Mode	50 de in Advanced Fin		C Detaile	ed							
Set the time zone you	are in										
Time Zone	(GMT) Greenwich	Mean Time :	Dublin, Edinburgh, L	isbon, Lor							
Select a default currer	ку										
Currency										-	•
								ОК	Cancel		
ttps://train2015.dynamic	s-trn.ox.ac.uk/CR	MTraining20)15/tools/personals	ettings/d	ialogs/per	sonalsettings.a 🕥	Local intranet Protected Mo	de: Off			

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).

	Webpage Dialog				1000	×
Set Perso	nal Options					?
		ze Microsoft Dynamics CR	RM, and manage your email temp	olates.		
General Synchroniz	ation Activities Formate	s Email Templates En	nail Privacy Languages			E.
	ge and settings for Get Starte		and trivacy congreges			*
Default Pane	Workplace	a panes	Default Tab	Dashboards		
Delauterane	Workplace		Delautrab	Dusibulius		1
Set the number of red	cords shown per page in any	list of records				
Records Per Page	50		•			
Select the default mo	de in Advanced Find					
Select the default mo	ede in Advanced Find	C Detailed				
Advanced Find Mode	Simple	C Detailed	\supset			
Advanced Find Mode	Simple		\supset			ļ
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Advanced Find Mode Set the time zone you Time Zone Select a default curre	Simple Jare in (GMT) Greenwich Mean Tim				OK Cance	el .

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	Save can be actioned using any of the following options:				
	• The save button in the bottom right corner of a form				
	• Ctrl + S				
	• option on the command bar				
Searching	The Search Box				
	Search for records				
	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.				
	The * wildcard can be used within the search field. For example:				
	*sal will find all entries which include the letters sal within the text				
	*History will find all entries that include the word History				
	The Alpha Bar				
	AII # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z				
	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.				
	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.)				
Mandatory	Mandatory fields are marked with a *.				
Fields	Tree Owner*				
	If you attempt to save a form where all mandatory fields are not completed an error message will appear.				

Feature	Guidance		
Number of Rows on a Form	 The default number of rows displayed on a form in list view is 50. This can be adjusted: 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. Setect your home page and settings for Get Started pames Debut Pame Vorplace I a get a ge		
Refresh	To refresh a form select the [F5] key.		
Notes sections	A notes section is located at the bottom of forms within MS Dynamics for free text entries. 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. Notes Image: Record and the protection is a 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. Notes Image: Record and the protection is a security reasons, take care if using this functionality. Notes Image: Record and the protection is a security reasons, take care if using this function is a security reasons, take care if using this function is a security reasons, take care if using this function is a security reasons, take care if using this functionality. Notes Image: Record and the protection is a security reasons, take care if using the protection is a security reasons, take care if using the protection is a security reasons, take care if using the protection is a security reasons, take care if using the protection is a security reasons, take care if using the protection is a security reasons, take care if using the protection is a security reasons, take care if using the protection is a security reasons, take care if using the protection is a security reasons, take care if using the protection is a security reasons, take care if using the protection is a security reasons, take care if using the protection is a security reasons, take care if using the protecting the protection is a security reasons, t		
Attachments	Documents, can be attached to the <i>Notes</i> section by clicking on the Intern 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:		

Feature	Guidance						
Look up	To look up a field within a form there are two ways in which you can do it:						
Fields	• Type in as much of the search item as you can and press the down arrow:						
	• Type in as much of the search item as you can and press the down arrow:						
	Tree Owner* Liz D 28 Liz Hartley						
	Notoc Wellington Square Tree Surveyor						
	• Click on the P icon to return a list of results that match your search criteria.						
Recently	The Recently viewed functionality provides an alternative to having to locate recently						
Viewed	opened forms manually.						
	 Using the Navigation Bar, navigate to the type of work tile that the application 						
	resides in. In the below example, the <i>'Travel Insurance'</i> tile.						
	Microsoft Dynamics CRM ↑ TRAVELINSURANCE Applications						
	Image: Second se						
	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.						
	Microsoft Dynamics CRM 🗸 🏦 TRAVEL INSURANCE 🗸 Applications 🗸						
	Recently Viewed						
	L G Afghanista Chris M (UAT) Tightrope Wal Tightrope Wal L G Africa0106 David Li						
Audit History	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.						
	M Microsoft Dynamics CRM 🗸 🏦 TRAVEL INSURANCE 🗸 Applications 🗸 L G Afghanistan010 🗸 🕀 Create Enter Search Item						
	Common						
	Ê Ê ² . 🗏 🖉						
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	This will bring up the audit history of the selected work-space:						
	L G Afghanistan010518						
	Audit History						
	Filter on: All Fields						
	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 G						
	Traveller L.G. Afghanistan010518 L.G.Afghanistan010518 Traveller Name L.G L.G L.G 05/06/2018 16:54 Kathy Shaw Update First Name L						
	Last Name G Traveller Afghanistan010 LG Afghanistan010518						
	Traveller Name 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						