

Travel Insurance and Registration System (TIRS)

Manage Department Details

Version 1.0

Contents

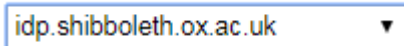
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1 Managing Department Details

1.1 Logging in / Accessing the System

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

The first time you log in, you'll see this screen: Hit the arrow next to fs.uas.ox.ac.uk and select

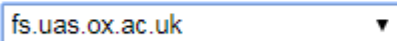
A screenshot of a dropdown menu with a blue border. The text 'idp.shibboleth.ox.ac.uk' is visible, and a small downward-pointing arrow is on the right side of the box.

then log in with you SSO.

Sign In

fs.uas.ox.ac.uk

The site that you are accessing requires you to sign in. Select your organization from the following list.

A screenshot of a dropdown menu with a blue border. The text 'fs.uas.ox.ac.uk' is visible, and a small downward-pointing arrow is on the right side of the box.

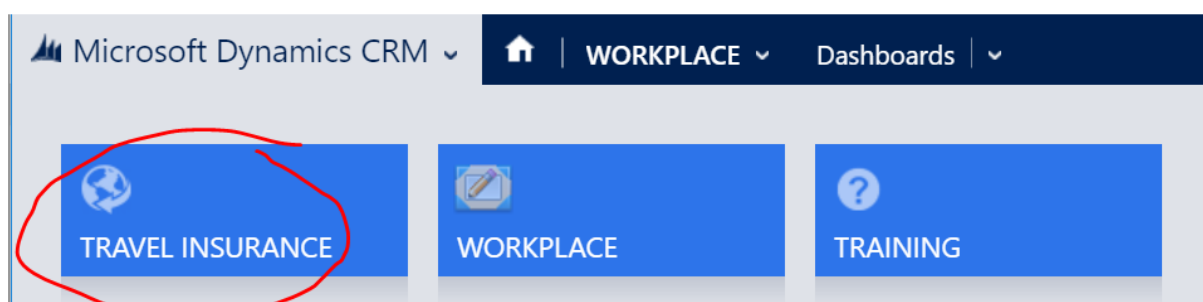
Continue to Sign In

1.2 Manage details

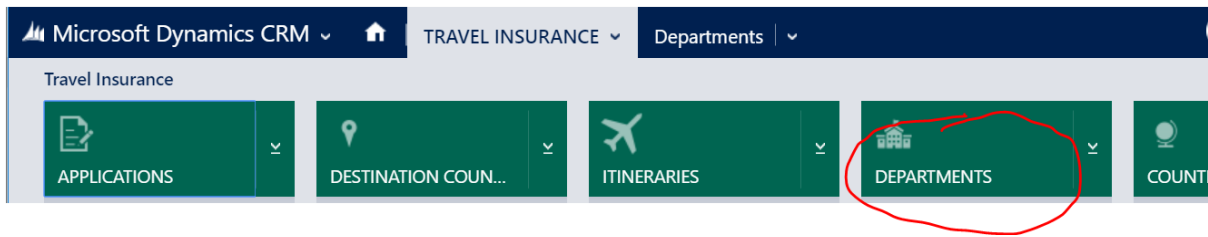
On occasion, it may be necessary to edit your departmental detail in the system.

Limited information is stored for the department itself, but department contacts are stored with the department. It is possible to add, amend and delete contacts for your department. This is where information for new starters and leavers as well as editing email preferences for contacts is managed.

To navigate to the department information, hover over Microsoft Dynamics CRM and select Travel Insurance.



Then, hover over 'Travel Insurance' and select 'Departments'.

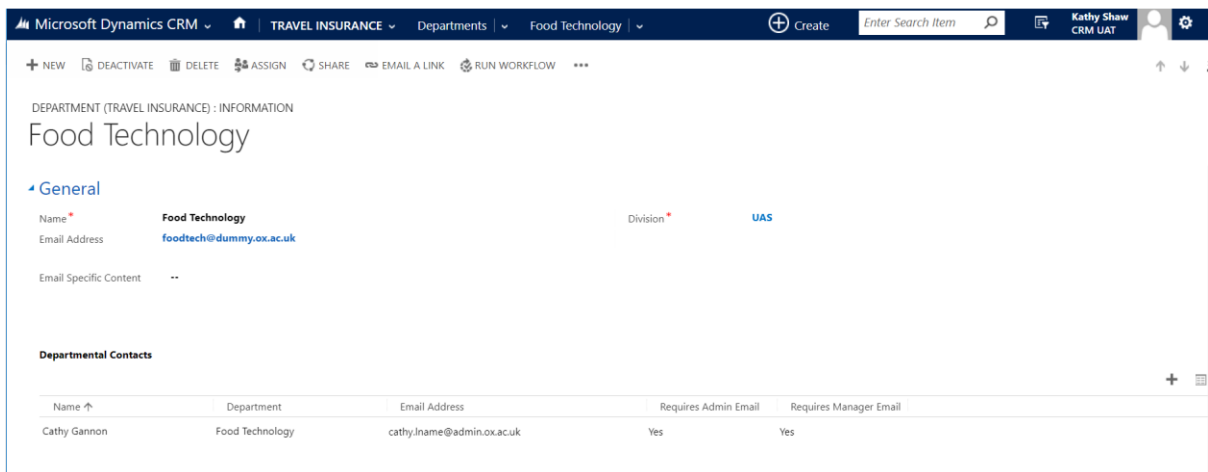


You will then, depending on the type of user you are, either see a list of departments or only the department to which you belong.



Select the department you wish to edit by either single clicking the name of the department or double clicking anywhere in the highlighted row.

You will then be able to view and edit the department details as below:



If a new user has been granted access to TIRS CRM, you will then need to add them as to your department contacts by hitting the '+' symbol. You can also edit department contact by either single clicking the name or double clicking anywhere in the row. After you have added or edited contacts, be sure to save your changes.

Microsoft Dynamics CRM | TRAVEL INSURANCE | Departments | Food Technology

DEPARTMENT (TRAVEL INSURANCE) : INFORMATION
Food Technology

General

Name * **Food Technology** Division * **UAS**
 Email Address **foodtech@dummy.ox.ac.uk**
 Email Specific Content --

Departmental Contacts

Name	Department	Email Address	Requires Admin Email	Requires Manager Email
Cathy Gannon	Food Technology	cathy.lname@admin.ox.ac.uk	Yes	Yes

Note: A red circle highlights a '+' icon in the top right corner of the Departmental Contacts table.

After you hit the '+', you will be taken to the following screen to add a department contact and set email notification preferences.

New Departmental ...

SAVE SAVE & CLOSE + NEW FORM EDITOR

DEPARTMENTAL CONTACT (TRAVEL INSURANCE) : INFORMATION
New Departmental Contact (Travel Insurance) Status * **Active**

General

Department * **Food Technology** Receives Admin Email **No**
 Last Name -- Receives Manager Email **No**
 First Name --
 Email Address * --

Add the info and hit Save and Close.