



# **Travel Insurance and Registration System (TIRS)**

## **Workflows and Sending Email QRG**

Version 1.0

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# 1 Workflow and Emailing options in TIRS (CRM)

This guide details the steps which should be followed to set status reasons as well as view and edit emails sent from Dynamics CRM (TIRS).

Certain emails will be created and sent automatically by the system, other emails will be created as drafts and rely on a user to send them. This gives the user the opportunity to review and edit, if appropriate, the email before it is sent. REFER TO THE TABLE BLOW FOR DETAILS.

## 1.1 Login

Login to the TIRS CRM via <https://production.dynamics.ox.ac.uk/>

Sign In through the University Single Sign On (SSO).

## 1.2 Status Reason Information

Please review the following table for status reason definitions, how they are set and the relevant notifications.

Status Reason			Email Notifications	
SR (status reason)	Description	How SR is Set	Automatic or On Demand	To/CC
<b>Draft</b>	Applied automatically when the application has been created prior to submission.	System Set	N/A	N/A
<b>Submitted</b>	Indicates the application has been submitted.	System Set	Automatic	Traveller / Travel Administrator
<b>Submitted for Referral</b>	Indicates the application has been Submitted for Referral	System Set	Automatic	Traveller / Travel Administrator

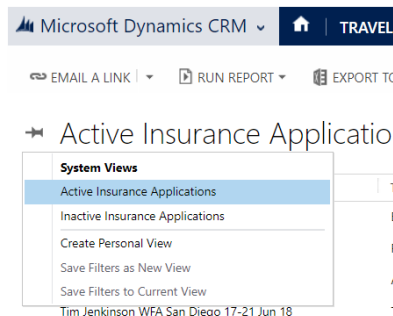
Referred to Insurance Team	Indicates that the insurance team is made aware of an application that requires referral.	Travel Admin/Manager	Automatic	Insurance Team / TA and TM
Awaiting Referral Response	Indicates that the insurance team have contacted the insurance company and are awaiting a response.	Insurance Team	N/A	N/A
Referral - Insurance Available	Indicates that the Insurance team have received a response from the insurance company that insurance is available.	Insurance Team	On Demand	TA and TM
Referral - Insurance Not Available	Indicates that the Insurance team have received a response from the insurance company that insurance is NOT available.	Insurance Team	On Demand	TA and TM
Proceed to Book Travel	Indicates that the application has been returned to the traveller for the itinerary & accommodation details to be added.	Travel Admin/Manager	On Demand	Traveller / Proxy
Returned for Corrections	This status should be set by the Travel Administrator or Manager if any of the given details are incorrect or missing.	Travel Admin/Manager	On Demand	Traveller / Proxy

Approved	Indicates an application has been approved.	Travel Admin/Manager	On Demand	Traveller / Proxy
Rejected	Indicates an application has been rejected.	Travel Admin/Manager	On Demand	Traveller / TA and TM/Insurance Team (if referral)
Cancelled	Set when a previously approved trip/application has been cancelled. This can be done in the web app or CRM.	System Set (can also be set in CRM)	Automatic	Traveller / TA and TM/Insurance Team
<b><i>Set for Resubmit</i></b>	Status when an application requires changes and will have to be resubmitted.	<b>Should never be set in CRM.</b>	N/A	N/A

### 1.3 Access Travel Insurance Applications

Via the Travel Insurance Dashboard, collapse the 'Emails' and refer to the 'Applications' section. Select the application you are wishing to review or action.

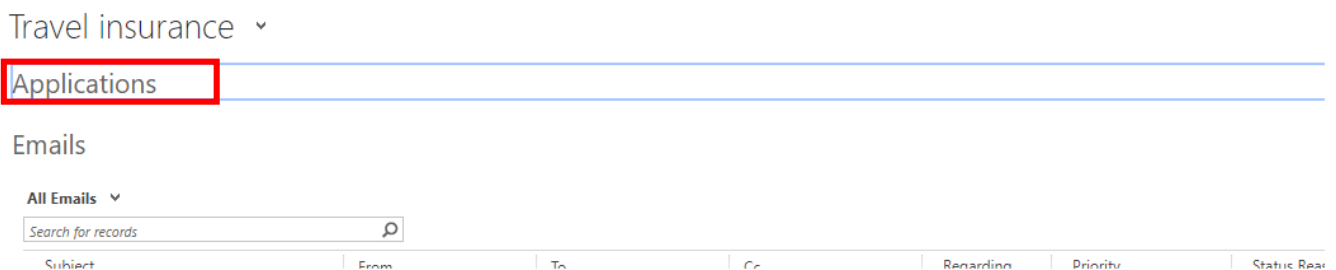
When you select a work-space (i.e. 'Travel Insurance', 'Email Messages', 'Destination Countries' etc.) in Microsoft Dynamics you will be taken to the default **View** for that work-space. You can switch views by using the **View** drop-down menu found by clicking the downwards arrow next to the **View's** title. This shows any 'System Views', plus any 'Personal Views' you have created.



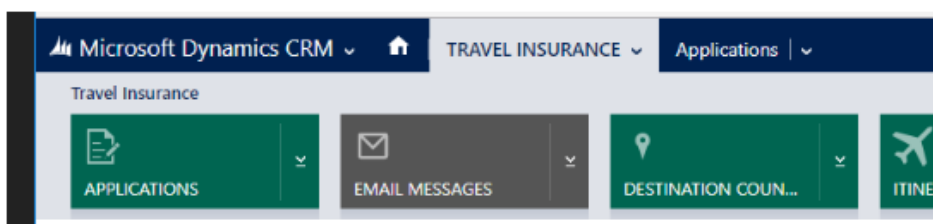
### 1.4 Access Emails

There are multiple ways to access the emails in CRM. A couple of examples are:

Via the Travel Insurance Dashboard, collapse the 'Applications and refer to the Emails section.



Via the Travel Insurance Email Messages site map, collapse the 'Applications' and refer to the Emails section.



A list of emails will be visible whichever method you choose.

To open an email, click on the email Subject. Open the draft email by clicking on the email Subject. If you are using a View which contains emails with different statuses, refer to the Status Reason column to help locate Draft emails.

Subject	From	To	Cc	Regarding	Priority	Status Reason
...	<IRAS PRAS Team>	...	...	A Hidden H...	Normal	Received
...	<IRAS PRAS Team>	...	...	Addressing...	Normal	Draft
...	<IRAS PRAS Team>	...	...	Research Fa...	Normal	Sent

**i** Any emails which have a Status Reason of Draft, will need to be sent manually. This enables the user to make any edits or add additional text as required. If no amendment to the email is required, the Bulk Send workflow can be used. Please refer to the TIRS – email Bulk Send QRG.

### 1.5 Edit and Send a Draft Email

**SEND** SAVE ATTACH FILE INSERT TEMPLATE INSERT ARTICLE CONVERT TO DELETE ...

EMAIL

Travel Insurance Application for Rob's ...

Priority Normal Due -- Status Reason Draft

Attachment

File Name File Size

No Attachment records found.

From Travel Insurance No-Reply

To Rob L (UAT) Rob's Trip (by Proxy Chris) 23-April

Cc Christopher Maidlow

Bcc --

Sent / Received

Subject Travel Insurance Application for Rob's Trip (by Proxy Chris) 23-April – Returned for Corrections

#### Advanced Editor

Source Signatures ...

B I U S x<sup>2</sup> I<sub>x</sub>

Styles Format Font Size

Dear Mr Rob L (UAT),

Your travel insurance application or travel details form has been returned to you for the following corrections.

Recipients are automatically populated, but if you want or need to add additional recipients, you can do so.

**i** You can attach documents using the **ATTACH FILE** option from the Command Bar.

It is also possible to format the body of the email, for example you can change the format of the text, insert bullet points etc.

Click 'Send' from the Command Bar.

You can use the arrows in the top right corner to move to the next/previous message.

## **1.6 Further Support**

### **TIRS Email – Bulk Send QRG**

This details how to send multiple emails in 'Draft' status at one time rather than manually send them each individually

### **TIRS Fundamentals**

For help with basic CRM use, including navigation and settings, creating views, searching, creating charts etc.