Travel Insurance and Registration System (TIRS)

Emails – Viewing, Editing and Sending QRG

Version 1.0

Contents

1 Emailing options in TIRS (CRM)

This guide details the steps which should be followed to 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.

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

The first time you log in, you will see this screen. Select idp.shibboleth.ox.ac.uk (as below) and enter you SSO credentials.
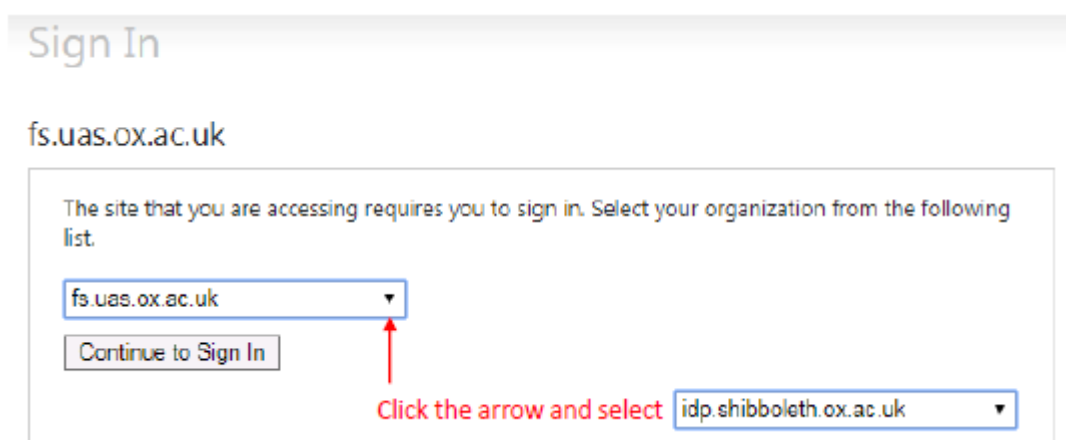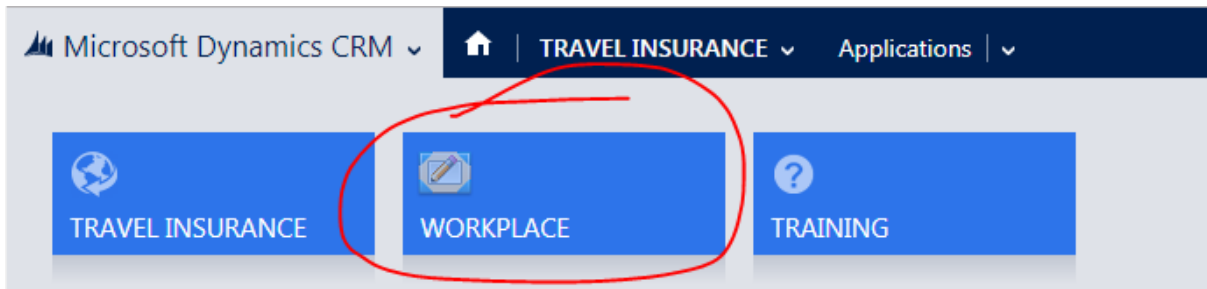

1.2 Access Emails
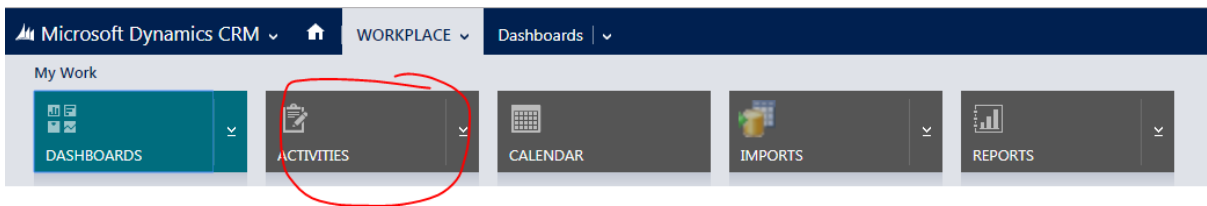There are multiple ways to access the emails in CRM. A couple of examples are:

1. Via the Travel Insurance Dashboard, collapse the 'Applications' and refer to the Emails section.
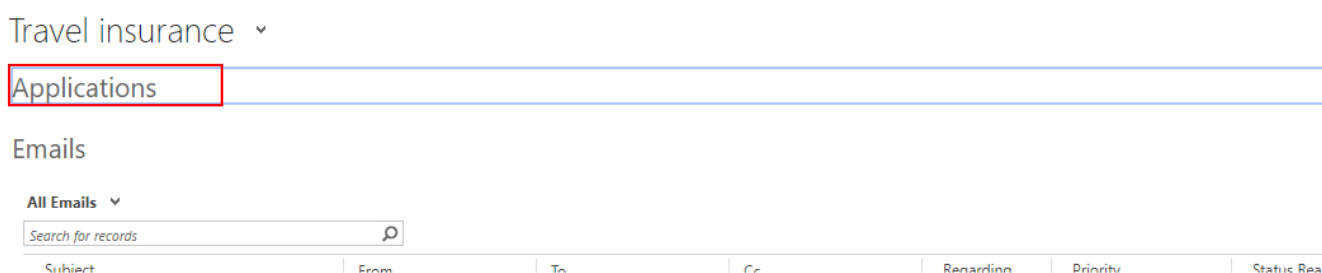
2. Via the Workplace. Hover over Microsoft Dynamics CRM and then select the 'Workplace' tile.
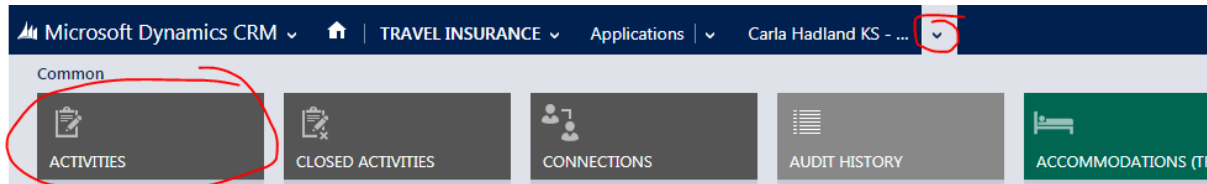

Now, hover over 'Workplace' and then select Activities.

Whichever of the methods above you choose, a list of all emails for your department will be displayed.

3. If you want to view emails for a specific travel insurance application, open the application you are interested in, hover over the arrow next to the application name and select activities.

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

ⓘ	*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, please refer to the TIRS Email - Bulk Send QRG.*

1.3   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	Due	Status Reason
Normal	--	🔒 Draft

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

Attachment

File Name ↑	File Size (B
No Attachment records found.	

Advanced Editor

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.

1.4   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.