(1) What is IRAMS?
IRAMS consists of two distinct parts, a web application (front end) linked to MS Dynamics Customer Relationship Management (back end). Applicants and departmental approvers only have access to applications in the web application, while fund managers or IRAMS administrators only have access to applications in the MS Dynamics CRM.

The names of application fields in the front end are not always the same as the names of fields in the back end.

(2) How do you log into the IRAMS CRM?
1. Login to the IRAMS CRM via https://production.dynamics.ox.ac.uk/
2. When logging on for the first time make sure you have selected fs.uas.ox.ac.uk
3. Enter your Single Sign-On User name preceded e.g. admn1234 and the password you have been given by the IT service desk (this is a different password from your SSO password).

(3) How do you get to the IRAMS section in MS Dynamics CRM?
1. To go to the IRAMS section click on the downward arrow next to Microsoft Dynamics and select IRAMS.
2. IRAMS will then be displayed to the right of the icon.
3. The first tile (Applications) will automatically open. You can access other sections (tiles) from the IRAMS menu.
4. There are fifteen tiles in total and you will need to use the rightward arrow to see the last seven tiles.
5. You can click on the icon to go back to the IRAMS Dashboard.

(4) To what do you have access in the IRAMS section in MS Dynamics CRM?
All IRAMS administrators have access to the same information in MS Dynamics CRM, i.e. all award schemes, all applications and associated emails, all information on users and approvers. Therefore, you will need to use search and views to get efficient use out of Dynamics.

QRG: IRAMS administrator QRG – search, filter and views in IRAMS

(5) Which tiles of the IRAMS section in MS Dynamics CRM will you use most?

Awards

In this section you can create your award scheme or amend your existing award scheme.

QRG: IRAMS administrator QRG – create new awards

Applications

This section contains all the applications in the system and from here you process applications, e.g. prepare packs for selection committees, record the outcome of applications, return applications to the PI and process extension requests.

To use this section efficiently you will need to use search and views.

QRG: IRAMS administrator QRG – search, filter and views in IRAMS

Department

From this section you maintain the list of department approvers. Department approvers process applications in the IRAMS web application.

QRG: IRAMS administrator QRG – adding and removing departmental approvers

(6) What is the typical IRAMS workflow?

When setting up an award you have to decide what the process is by which applications are approved. IRAMS has the following build in functionality.
Applicants and departmental approvers only interact with the web application, while divisions approve within IRAMS in the MS Dynamics CRM. Selection Committees (where used) operate off-line, and the IRAMS administrator responsible for the scheme uses IRAMS in MS Dynamics CRM to create the packs with applications and record the decisions of the selection committee in MS Dynamics CRM.

(7) How can I get a list of Departments on IRAMS

There are multiple Department records in MS Dynamics CRM as the CRM has multiple applications of which IRAMS is just one. To obtain a list of IRAMS Departments go to the Departments’ tile. Select IRAMS All Department View from the drop down list if not already pre-selected. You can then use filters to see a list of departments from a particular division. And save this as under My Views.

(8) What do I need to know about email notifications?

Email notifications are built into IRAMS and are triggered (1) whenever the status of the application changes, (2) three months before the end date of an award and when the award has ended (3) when final reports are due (if activated in the award set-up) - three final reports reminders are sent in total.

The majority of these messages are immediately sent when triggered by the system, a small number are created in draft and need to be sent out manually.

You can find the emails that have been sent and those located in draft in the IRAMS dashboard (see below).

(9) What is the IRAMS Dashboard for?

1. On logging in you will be presented with the IRAMS Dashboard listing emails and applications.
2. The email list defaults to All IRAMS Emails (My Teams) Draft.
3. You can select different email lists by clicking on the downward arrow.

4. You can search the Subject of email lists by entering a search term in the search box.
5. You can always find the IRAMS dashboard by clicking on home.

(10) How can I make sure my favourite list appears when I use IRAMS?

You can use the pin icon to select your favourite view. Use the drop down to select your view and click on the horizontal pin to keep this view. This will then become Applications with Department.

Whenever you open the Applications section in IRAMS this list will appear.

Technical Issues

Please raise any technical issues with the IT service desk: help@it.ox.ac.uk