Introduction

MS Dynamics is a customer relationship management (CRM) system. A number of University applications are built in MS Dynamics CRM. One of these is IRAMS. This guide details how to search and create views in the IRAMS section in the Dynamics CRM.

Login

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 Active Directory password you have been given by the IT service desk (this is a different password from your SSO password).

Searching in IRAMS CRM

There are various ways of searching for records in IRAMS CRM

1. Using top search
   The top search located at the top of the screen is configured to search for IRAMS applicants and IRAMS applications.

   It is recommended to always prefix a '*' wild card to ensure all entries with the search term come up, e.g. *water.

   Please note that the IRAMS application search only searches the Title and the Application Number.

   You can limit your search to either IRAMS applicants or IRAMS applications by clicking on the magnifying glass, enter your search item and select the right category from the drop down list in 'Filter with'.

2. Application lists or views
   Upon opening the Applications tile you get a list of all Active Applications. You can select a different list by clicking on the downward arrow.

   Please note that the search only searches the Title and the Application Number.

   For example you may wish to see all applications, where the title begins with a 'Z'.
   1. Sort the Title column by clicking on Title
   2. Choose which letter to filter the applications by using the 'Alpha Bar' at the bottom of the screen.

   You can do the same for any of the other columns, although some columns only have numerical values, e.g. Application Number and therefore the ‘Alpha Bar’ cannot be used.

3. Searching applications
   To search lists of applications, enter the search criteria into the local search field.

   It is recommended to prefix a '*' wild card to ensure all entries with the search term come up, e.g. *water.

   Please note that the search only searches the Title and the Application Number.

4. A to Z search
   By sorting on a column title, you can filter the results using the ‘Alpha Bar’ (the A-Z row at bottom of the screen).
   1. Sort the Title column by clicking on Title
   2. Choose which letter to filter the applications by using the ‘Alpha Bar’ at the bottom of the screen.

   You can do the same for any of the other columns, although some columns only have numerical values, e.g. Application Number and therefore the ‘Alpha Bar’ cannot be used.

5. Filter Search
   You can use this, if you wish to search for a particular division, department or scheme:
   1. Click on the icon,
   2. Click on the downward arrow menu next to the column title you wish to filter on. For Divisions select 'filter by specific division'.
Use Search to find the division you are looking for or alternatively click on the magnifying glass and the full list will appear in the table below. Select the division you are looking for, by clicking on the √ next to relevant name and click Add

To clear results click on Reset Filter

6. Custom filter

Although there are several methods of filtering (see above), the Custom Filter is one of the more powerful options. Choose Custom Filter if for example you wish to search for projects with a start date after a certain date

Or any other specific term(s)

Views in IRAMS CRM

Views are sets of columns within Dynamics which are grouped together to form a single view of data. These views can then be selected from a drop down list in the main view screen, e.g. applications

1. Saving filters as views

Any of the filters created through filter search or custom filter can be saved and then be listed under My Views

You will be asked to name the filter and save it as a view
Once you have selected your columns, press OK.

To run the query click on

You can save this advanced query as a view by clicking on the Save icon. Once saved the view will appear in the drop down list of Active Applications under My Views

Other useful functions are:

- **Saved Views**: You can use this to run and modify one of your saved views
- **Edit Properties**: To save changes to a view as a new view under a different name
- **Details**: To change the criteria of an existing view
- **Pin View**: To pin a view so this is the view that appears when you first open a tile

**Exporting to Excel**

Results from searches, filters and views can be exported to Excel by clicking on the Export to Excel function

This will give you the following options for downloading to:
- Only the records on the screen
- All search results in an Excel spreadsheet
- All search results as a pivot table
- All search results as a Dynamics worksheet, i.e. with the ability to delete columns from the results and/or add fields not currently shown as columns

**Further Support**

- **Dynamics manual**

For help with navigation and settings, for example creating views, searching, creating charts etc.

https://help.it.ox.ac.uk/services/casemanagement/index

**Technical issues**

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