Introduction

This guide details the steps which should be followed to review and update all Applications using Dynamics CRM.

Login

1. Login to the IRAMS CRM via https://production.dynamics.ox.ac.uk/
2. Click Continue to Sign In.
3. Enter your User name, e.g. bsp\ABCD1234 and your Password.

View an Application

Option A – Use the IRAMS Dashboard

a. Click on the icon.

Option B – Navigate to the APPLICATIONS (IRAMS) tile

a. From the Microsoft Dynamics menu, select the IRAMS tile. Once it has been selected, IRAMS will be displayed to the right of the icon.

b. From the IRAMS menu, select the APPLICATIONS (IRAMS) tile, once it has been selected, Applications (IRAMS) will be displayed to the right of the IRAMS menu.

1. Find the required application. There are various ways of searching for applications in Dynamics, refer to the manual for assistance on the different methods.
2. Open the Application by clicking on its title.

- At the top of the screen you can see high level information, including the Application Title and Principle Applicant (i.e. the Principal Investigator).
- The application is broken down into different sections, for example Applicant Details, Project Details etc.
- Each section can be expanded / collapsed by clicking on the Section Header.
- The Application Summary can be downloaded by using the DOWNLOAD PDF option in the Command Bar.

Some of the key information you may wish to view or edit from the ‘Information’ form template of the Application form are listed below:

<table>
<thead>
<tr>
<th>Section Header</th>
<th>Key Information to View / Edit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applicant Details</td>
<td>High level information about the applicant.</td>
</tr>
<tr>
<td>Project Details</td>
<td>Key details relating to the project including the various dates. The status of the application can be updated from this section, however we recommend that this information is the final step you record. When the application status is updated an email is automatically sent to the applicant. Refer to the IRAMS Notification document for more detail and the Application Status guidance.</td>
</tr>
<tr>
<td>Financial</td>
<td>All financial related information, including funding type and contribution from external sources.</td>
</tr>
<tr>
<td>Process Management</td>
<td>The dates of key milestones within the application process, along with dates certain emails were sent to the applicant and the decision date. Refer to the IRAMS Notification document for more detail.</td>
</tr>
<tr>
<td>Application Details</td>
<td>Further information relating to the application, including the lay summary.</td>
</tr>
<tr>
<td>Extension</td>
<td>To be used if an application has been granted an extension. Details include, reason, new end date and funding remaining.</td>
</tr>
</tbody>
</table>
## Section Header | Key Information to View / Edit
--- | ---
**Final Report** | Information relating to the final report, including whether it has been received and the outcomes.
**Comments** | Different approvers (e.g. department / division) can record their comments.
**Conditions** | Details whether conditions have been applied, and what the conditions are.
**Editors** | Editors can amend the application, but are not involved in carrying out the research.
**Co-Applicants** | Co-applicants are either internal (from Oxford) or external (from other Universities) and will be working on the research project with the applicant. They can also edit the application and will receive all the email notifications. External partners are not as involved in the project as co-applicants, but the applicants want to acknowledge them. They cannot edit the application and will not receive any email notifications.
**Notes** | The Case for Support can be downloaded.

### Related Items

Additional information relating to the application can be found in the Related Items. For example, draft emails waiting to be reviewed (for that applicant) can be accessed from the Activities tile, along with Audit History and Co-Editors (these are people who can edit the application but are not co-applicants).

Some of the data can be accessed from the main application record, e.g. Co-Applicants. Also more functionality is available, for example the information displayed in each of the related items can be exported to Excel.

1. Click on the arrow to the right of the application title.
2. Select the required title(s).
3. To navigate back to the application record, click on the application title from the top of your screen.

### Deactivating / Activating Applications

Most of the Views have been designed to include ‘active’ applications. You may wish to mark an application as ‘inactive’, for example if an applicant chooses to withdraw their application. If an application is made inactive in error, it can be reactivated.

#### To deactivate an active application:

1. Tick to the left of the relevant application title.
2. Select **Deactivate** from the Command Bar.
3. Select ‘Cancel’ from the Status dropdown menu and click **Deactivate**.

#### To reactivate an inactive application:

1. Tick to the left of the relevant application title.
2. Select **Activate** from the Command Bar.
3. Click the **Activate** button from the confirmation message.

### Downloading Applications

#### Prepare applications for selection committee

1. Use a View to retrieve the appropriate applications for your fund for a particular application deadline. Refer to the Dynamics manual for creating Views.
2. To download a list of applications use the **Export to Excel** option from the Command Bar.
3. To download applications as PDFs, select the applications you require, by either:
   a. Selecting all applications in the View by clicking on the tick column heading
   b. Selecting some (or one) of the applications by ticking to the left of the relevant application titles.
4. Select either **Download PDF** or **Download Zip** (for larger files) and save files to your local network drive.

### Divisional Assessment

#### Prepare applications for selection committee

1. Use a View to retrieve the appropriate applications for your fund for a particular application deadline. The status of applications is ‘With Division’. Refer to the Dynamics manual for creating Views.
2. Refer to the **Downloading Applications** guidance.
Following divisional selection committee review

1. Open the Application and ensure the 'Information' form is selected.

2. From the Financial section, update the Divisional Adjusted field, this is the amended award amount.
3. If relevant, in the Comments and Priority section record the Divisional Priority.
4. For John Fell Fund only, expand the General section and update the Term of Application (this places an application in a gathered field for assessment).
5. If appropriate, update the Comments for Fund Owner field from the Comments and Priority section.
6. From the General section, update the Status to With Fund Owner, please note this is the last step you should complete.

Fund Owner Assessment

Prepare applications for divisional selection committee

1. Open the Application and ensure the Information form is selected.

2. Use a View to retrieve the appropriate applications for your fund for a particular application deadline. The status of applications is 'With Fund Owner'. Refer to the Dynamics manual for creating Views.
3. Refer to the Downloading Applications guidance.

Off system

1. Receive decisions from funding panel and the project codes from finance teams.

Unsuccessful applicants

a. If the applicant is unsuccessful for now, but can change the application and reapply, update the Status, in the Project Details section, to ‘Resubmit’.
b. Or, if the applicant is unsuccessful outright, follow the Deactivating/ Activating guidance, for step 3 the Status should be ‘Unsuccessful’ (not cancel).

Successful applicants

1. Record the Finance Project Code in the Financial section.
2. In the Granted field enter the amount of money granted by the fund, unless the award is JFF and the source of funding is the Capital fund, in which case use the Granted CF field.
3. Populate FAS JFF from the Financial section, this is the final amount spent.
4. If the award is conditional, update the Conditions Apply field to ‘Yes’ in the Conditions section.
5. Record the conditions in the Conditions Summary.
6. From the Project Details section, change the Status to reflect the committee decision, either ‘Awarded Conditional’ or ‘Awarded Unconditional’, please note this is the last step you should complete.

Record condition outcomes

To record that conditions have been met:

1. From the Conditions section, record ‘All’ in the Conditions Met Status field.

To record that conditions have not been met:

1. From the Conditions section, record ‘None’ in the Conditions Met Status field.
2. If there are other changes which need to be made to the application, updates these now.
3. From the Command Bar, select the Deactivate button.

4. Choose ‘Unsuccessful (Conditions not Met)’ from the Status dropdown menu.
5. Click Deactivate.

Extensions requests

The Fund Owner will process the extension request as below.

To reject an extension:

1. Review Extension section.
2. The final step should be: in the Extension Approval sub section update the Extension Request Approved by to Rejected. (NB: an email is sent to applicant).

To approve an extension:

1. Review Extension section.
2. Update the Comments to appear on Notification field (optional).
3. Update the Extension approved date.
4. The final step should be: update the Extension Request Approved by to ‘Fund Manager’ (NB: an email is sent to applicant).

To return the application to the PI and enable them to complete the form again:

1. Review Extension section of the Application record.
2. Change Extension Pending to ’No’.
3. Make sure the fields relating to extension emails are blank: Extension Request Approved Email Sent, Extension Request Awaiting Approval Email Sent, Extension Request Rejected Email Sent.
4. If the department has already assessed the extension, inform them of this change and clear their assessment data from the Department’s Comments to fund Manager, Department’s Comments to PI and Department Support.
5. Inform the applicant to let them know they can resubmit again. There is no automatic email to tell them this.

Final Report

Further information can be viewed in the Final Report section.

Application Status

It is strongly advised that this is the last section you complete. Once the status has been updated and saved, an email will automatically be sent to the applicant confirming the status and if appropriate any conditions
that you have recorded. To update the status of an application, follow the steps below:

**Definitions of Application Statuses**

Statuses highlighted blue, are updated from the **Deactivate** button from the Command Bar. All other statuses are updated from the **Status** field from the ‘General’ section (Divisional Form) or the ‘Project Details’ section (Information Form).

<table>
<thead>
<tr>
<th>Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft</td>
<td>Applicant has started work on the application but it has not yet been submitted for review.</td>
</tr>
<tr>
<td>With Department</td>
<td>Application is being reviewed by the department, dependent on the approval path on the Award.</td>
</tr>
<tr>
<td>With Division</td>
<td>Application is being reviewed by the division.</td>
</tr>
<tr>
<td>Cancel</td>
<td>If the application has been deactivated.</td>
</tr>
<tr>
<td>With Fund Owner</td>
<td>Has been accepted by the division and sent to the Fund Owner.</td>
</tr>
<tr>
<td>Resubmit</td>
<td>Changes are required to the application</td>
</tr>
<tr>
<td>Awarded Conditional</td>
<td>Application is successful and there are conditions to be met.</td>
</tr>
<tr>
<td>Awarded Unconditional</td>
<td>Application is successful and there are no conditions to be met.</td>
</tr>
<tr>
<td>Unsuccessful</td>
<td>Following the review by the Fund Owner, the applicant has been unsuccessful.</td>
</tr>
<tr>
<td>Unsuccessful (Conditions not met)</td>
<td>Following the review by the Fund Owner, the applicant was initially given a conditional award, but did not meet the required conditions.</td>
</tr>
</tbody>
</table>

You can also view applications from the Awarded Application section of the Award record.

To find an application you can use select or create a new View, or use the search.

**Further Support**

**IRAMS Notification document**

This details what email notifications, and their contents, are created when certain processes are followed. Some emails are automatically sent others are saved as draft so that they can be reviewed beforehand.

**View and Edit Emails QRG**

For help updating and sending emails from the system, as well as viewing emails which automatically sent.

**Dynamics manual**

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

**Technical issues**

Please raise any technical issues with the IT service desk: [http://help.it.ox.ac.uk/](http://help.it.ox.ac.uk/)