Introduction
This guide details the steps which should be followed to set up a new Award 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 Single Sign-ON User name, e.g. bsp\ABCD1234 and your Password.

Create New Award
1. From the Microsoft Dynamics menu, select the IRAMS tile, once it has been selected, IRAMS will be displayed to the right of the icon.
2. From the IRAMS menu, select the AWARDS tile, once it has been selected, Awards will be displayed to the right of the IRAMS menu.
3. Click from the Command Bar to create the new Award.

General and Fund Owner Information
1. Record the Award Name, this is the name that will appear in the application.
2. Select Yes / No for the Allow Extension Request field accordingly, by selecting Yes this will allow successful award holders to apply for extensions.
3. Expand the Fund Owner Information section by clicking on its title.
4. Enter the URL for more information about the award in the Award Guidelines URL field.
5. If yes is selected for Permission to Publish Information this question will appear in the application.
6. Search and select your division or Research Services as the Fund Owner.
7. The Funding Scheme Info field can be used to record a very brief description / summary of the award (recommend one sentence). Applicants will see this text when they hover their cursor over the information icon in the portal.
8. Search and select the email account which should be used in the ‘From’ field on all emails sent to applicants in the Default Email Queue field. Note: you will need to prefix your search with an asterisk to locate the email account.
9. Enter the email address which should appear in the body of emails generated from the system in the Fund Owner From Email field.

Address. For example “we are happy to discuss any issues relating to your award via XXXX@XXXX.ox.ac.uk”.
10. To include an email signature for all emails against the Award, enter the text into the Fund Owner Email Signature field.
11. Click SAVE from the Command Bar.

Deadlines
1. Expand the Deadlines section.
2. Click on the + icon from the right of your screen.
3. Click on the - icon.
4. Click the + New option, the New Deadline window opens.
5. Record a Name for the deadline.
6. Enter the date and time the award is open from in the Apply From field.
7. If there is an end date for applications, enter the date and time in the Apply By field.
8. Click SAVE & CLOSE from the Command Bar.
9. If you did not enter a date in the Apply By field, tick the box next to (under the Deadlines section heading).
10. Awards will be displayed in the portal until the Apply By date and time. If you would like to display the Award on the list for longer (e.g. to indicate that a deadline has been and gone), specify the date and time in the Display Until field. NB: This will not extend the application deadline.

Approval Path
This information is needed so that applications for this award are progressed following the correct path of approval. For example some applications will go the department before going to the divisional office.
1. Expand the **Approval Path** section.
2. Click on the + icon, the *New Award Approval Path (IRAMS)* window opens.
3. Enter 1 into the **Sequence Number** field.
4. Select the first level of approval in the **Approval Status** field.
5. Click **SAVE** from the Command Bar.
6. If there are additional levels of approval select **New** from the Command Bar and repeat steps 3 – 5 accordingly.
7. Close the window.
8. The order of approval will then be displayed.

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### Selection Committee Members

This functionality is only applicable to the John Fell Fund.

This section is used to record those committee members who should have access to the application PDFs.

Note: You will only be able to record members who have an Oxford Single Sign On.

If this does not apply to your Award, skip to the **Additional Information** section.

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### Additional Information

Each Award Application form can be tailored based on what information is required by updating these fields.

Depending on what is selected different questions / tabs will appear on the application form.

For an explanation of each field, hover your cursor over each of the field titles or contact your local super user.

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### Additional Information

<table>
<thead>
<tr>
<th>Project tab</th>
<th>Award &amp; Final Report</th>
<th>Approval &amp; Final Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show Project Category</td>
<td>No</td>
<td>Display Departmental Priority</td>
</tr>
<tr>
<td>Show External Funding question</td>
<td>Yes</td>
<td>Show Budget Information</td>
</tr>
<tr>
<td>Show Lay Summary</td>
<td>No</td>
<td>Show Lay Summary</td>
</tr>
<tr>
<td>Show Indirect and Directly</td>
<td>No</td>
<td>Show Indirect and Directly</td>
</tr>
<tr>
<td>Case for Support Information</td>
<td>No</td>
<td>Case for Support Information</td>
</tr>
</tbody>
</table>

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1. Expand the **Additional Information** section.
2. Review each field and update where necessary, pay particular attention to:
   a. **Show Budget Information** – if you want the finance tab to be show in the Application Form.
   b. **Show Lay Summary** - If you want this free text field to be available for the applicant to complete in Case for Support tab of the Application Form.
   c. **Display Departmental Priority** - Allows the department the option to record the priority of the application.
   d. **Final Report Allowed** – successful applicants can submit final reports about the outcomes of their project.
   f. **Months Before First Reminder For Final Report** - Refers to the number of months after the project end date when the first reminder will be sent to the applicant, co-applicants, editors and department approver.
      Note: If you enter 0 it will be sent 2 days after, if you leave it blank it won’t be sent at all.
      If the final report has already been submitted before the date for the first reminder has been reached, the reminder email won’t be sent.
   g. **Spending Watershed Email** – used to work out if, and when this email should be sent. It contains a number of months from the Project Start Date (integer, can be 1, 2, 3... etc or blank) after which the email should be sent. If this field is blank, then the system email will not be sent to applicants for this award.
3. Ensure all changes are saved.

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### File Attachments

Guidance documents which applicants should download and refer to whilst making their application.

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1. Expand the **Selection Committee Members** section.
2. Click on the + icon from the right of your screen.
3. Search and select the relevant members.
1. Expand the File Attachments section.
2. Click on the + icon from the right of your screen, the New IRAMS File Attachment window opens.
3. Select the Document Type from the list of options

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Award Ts &amp; Cs</td>
<td>This document will be sent via an automated email as part of the granting of the award process.</td>
</tr>
<tr>
<td>Case for Support Template</td>
<td>This document appears in the Application Form and should be uploaded if you require the applicant to use a specific template for their case for support. Ensure the Case for Support Instructions field in the Additional Information section is updated accordingly.</td>
</tr>
</tbody>
</table>
4. Click SAVE from the Command Bar.
5. Click in the Enter a note field and click the Attach button.
6. Click the Browse... button.
7. Find and highlight your document from your network drive and click Open.
8. Click Done and close the window.

Awarded Applications

Applications made against the award can be viewed from the Awarded Applications section or from the Awards tile from the IRAMS menu.

You can use select or create a new View, or use the search. Refer to the View and Update Applications Quick Reference Guide for more information.

Further Support

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

View and Update Applications QRG
Follow the steps to view and update submitted applications.

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

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