CPL SOFTWARE

PARTNERS TO PROPERTY FACTORS
& BLOCK MANAGERS

IN-TRAY

TRAINING GUIDE
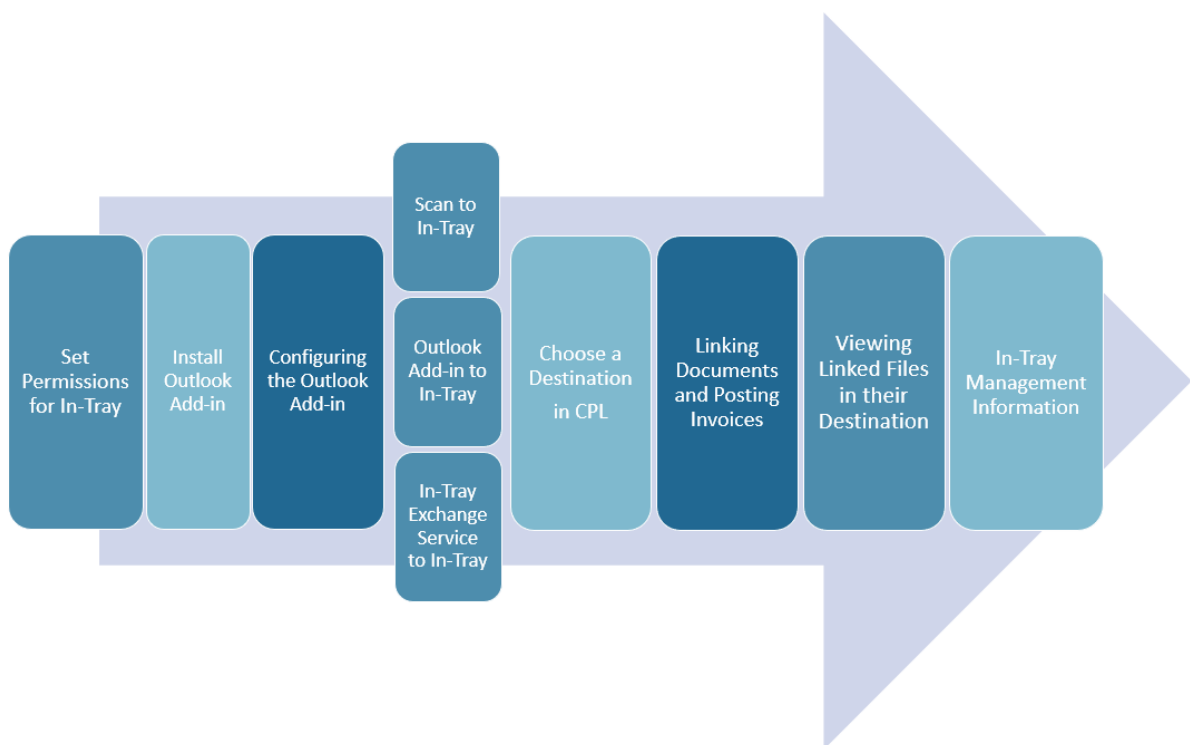
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CONTENTS

INTRODUCTION

In-Tray is a document management system which allows users to streamline the paper flow throughout an office and permits for the electronic filing of documents and invoices through CPL.

By scanning, dragging or importing documents into specific network directories, users can view their incoming documents in one place and link to various CPL record types with a few simple clicks. This includes saving documents to Client and Development accounts as well as raising Purchase Ledger invoices directly from the inbound invoice that was scanned in.

In conjunction with In-Tray, there is an Outlook Add-in available. This allows you to directly link emails from an Outlook inbox to CPL. This provides the opportunity to link emails themselves but also the ability to link documents contained within emails.

There is also an In-Tray Exchange Service available, which can process incoming and outgoing emails into users' In-Trays and clients' documents.

The diagram below sets out the general process for In-Tray which will be covered in this Guide.

Scan to In-Tray

| Set Permissions for In-Tray | Install Outlook Add-in | Configuring the Outlook Add-in | Outlook Add-in to In-Tray | Choose a Destination in CPL | Linking Documents and Posting Invoices | Viewing Linked Files in their Destination | In-Tray Management Information |

In-Tray Exchange Service to In-Tray

PERMISSIONS

For In-Tray to work correctly you will need to ensure the user has the correct individual permissions set or has been assigned a group of appropriate permissions.
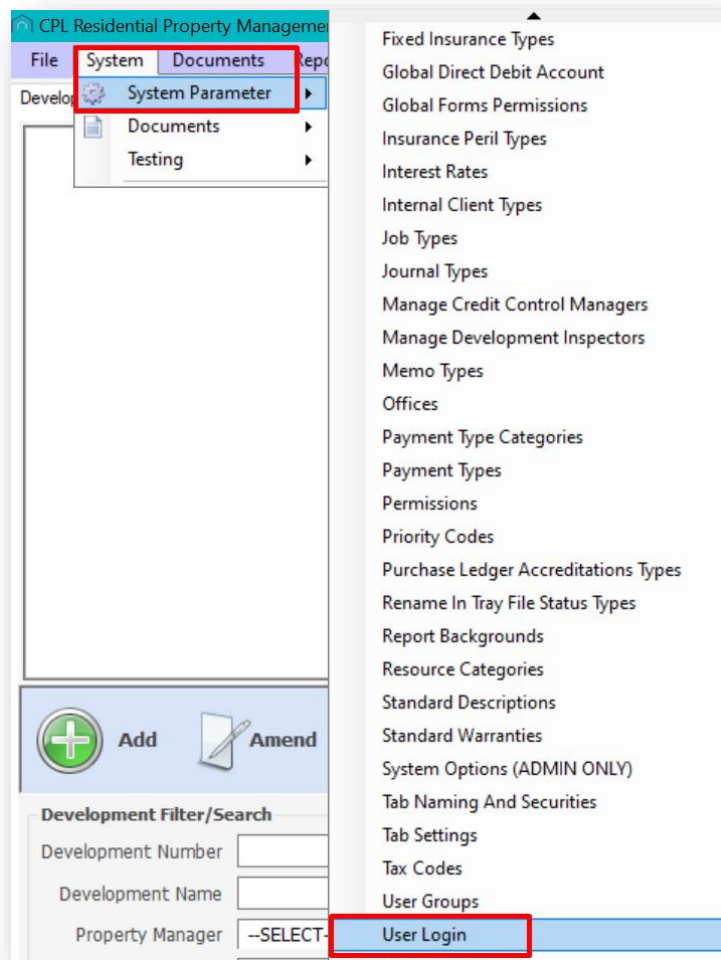
The In-Tray permissions are:

- In-Tray Allow Post to Hold File
- In-Tray Allow Reversal
- In-Tray Allow SLA Override
- In-Tray Set Selected file to Allocated
- In-Tray View All Management Information
- In-Tray Allow Lateral View

For further information on setting permissions and groups, please see the **Setting Permissions for Users in CPL Training Guide**.

You will also need to make sure information is entered in a user's **User Login** screen within the **System Parameter** section in CPL. Follow the steps below to make sure this is configured correctly.

On the main CPL screen click on **System**, then **System Parameter** and scroll to select **User Login**.

This will open the **User Logins** window which will display a list of your CPL users.

Select the user you would like to configure for In-Tray and double-click on their name. This will open the **Amend User** screen.

On this screen there are two In-Tray related fields: the **Supervisors** drop-down menu and the **In Tray Directory** field.

The In Tray Directory field specifies what the users file should be called in CPL's file directory. Enter the name as you would like it to appear in the directory.
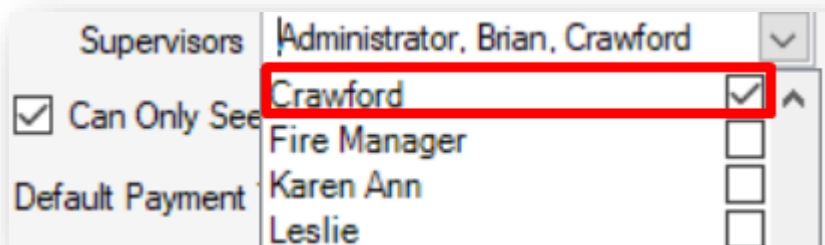

If there is nothing entered in this field In-Tray will not work correctly and you will see error messages informing you the In-Tray In-Box cannot be found when logging in.

Selecting a name from the **Supervisors** drop-down menu will enable that user's supervisor to be able to see the outstanding In-Tray entries for this user.

Click on the drop-down arrow on the right of the field and select the tick box next to the name of the supervisor or line manager. You can select more than one option from this field by adding ticks against other usernames.

SET-UP

Our CPL Support team will enable the In-Tray module and configure two separate directories within the allocated folder path for your business – **InTrayDocumentDirectory** and **InTrayInvoiceDirectory**.

Please speak with your local IT services representative in order for them to configure your scanner to allocate documents to the correct folder path.

When the In-Tray module has been activated in the system and you have the correct permissions set a folder will be created for you in both of the following directories: **InTrayDocumentDirectory** and **InTrayInvoiceDirectory**.

ADDING FILES TO IN-TRAY

There are a number of different ways that documents and invoices can make their way into the In-Tray in CPL:

- A member of your team scanning documents and saving these into the appropriate user's folder in the In-Tray file directory referred to above. These documents could be of any type, for example, letters arriving by post or paper invoices from contractors.
- Saving attachments from emails directly into the appropriate In-Tray directory folder or saving them elsewhere on your system and dragging and dropping them into a folder in the directory.
- Dragging and dropping/copying and pasting from other directories on your network into the In-Tray directories.
- You can also drag and drop emails, documents and files directly into the open In-Tray module itself.
- The In-Tray Exchange Service processing incoming and outgoing emails into In-Tray.

IN-TRAY OUTLOOK ADD-IN

### SETTING UP THE OUTLOOK ADD-IN

The In-Tray Outlook Add-In can be installed on each user's desktop or laptop. Please contact CPL Support to discuss this.

CONFIGURING THE OUTLOOK ADD-IN

The screenshots below have been taken using Outlook 2019. Please be aware that if you have a different version these may appear slightly differently.
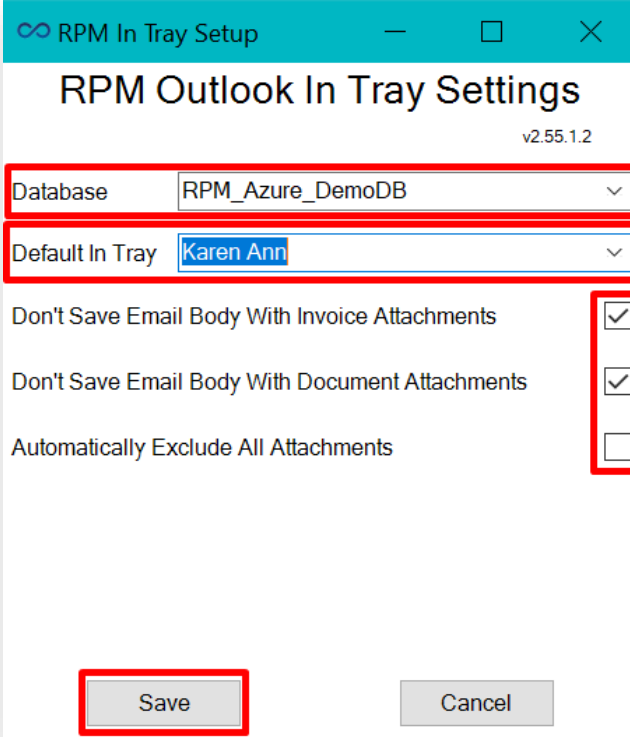
Once the Add-in has been installed you can make some configurations within Outlook itself.

Open Outlook and on the **Home** tab you should see the **RPM In-Tray** menu is now in the menu bar/ribbon.
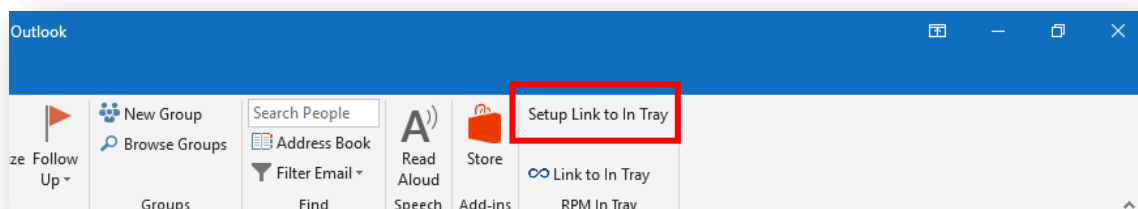
Select the **Home** tab in Outlook and click on the **Setup Link to In Tray** option in the menu bar.

This will open the **RPM Outlook In Tray Settings** window:

Using the drop-down menus, select the **Database** as **RPM** if it is not already selected and the **Default In Tray** as your own username in CPL.

In this window, there are also three tick box options available.

These are:

- **Don't Save Email Body With Invoice Attachments**
- **Don't save Email Body With Document Attachments**
- **Automatically Exclude All Attachments**

These options govern what you are transferring through to CPL using the Add-in. You can choose whether you are saving only the documents/invoices attached to your email or both the email and the attached documents. You can also choose not to save any attachments at all.

You may wish to speak with your local IT services representative or your management team about these settings as they can affect your data storage.

Use the tick boxes to make your selections and click the **Save** button.

Upon saving, your choices will become the default settings for your In-Tray Add-in. However, they are easily modified by clicking the **Setup Link to In Tray** option, which will open the settings window again and allow you to adjust as required. Remember to click **save** to implement any subsequent changes.

Having installed the add-in and completed the set-up, you can get started with sending documents from Outlook to the In-Tray module.

You can select an email in Outlook that has a document attached you wish to send to the In-Tray module in CPL. While this email is selected, click the **Link to In Tray** option (with the CPL logo next to it) in the Outlook Menu Bar.
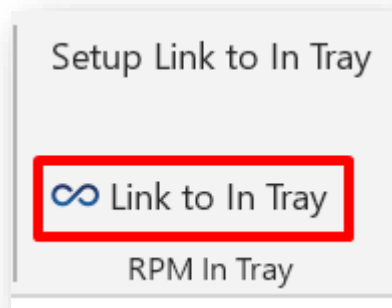
Alternatively, right-clicking on this email will display your Outlook menu with a **Link to In Tray** option at the bottom of the drop-down list.
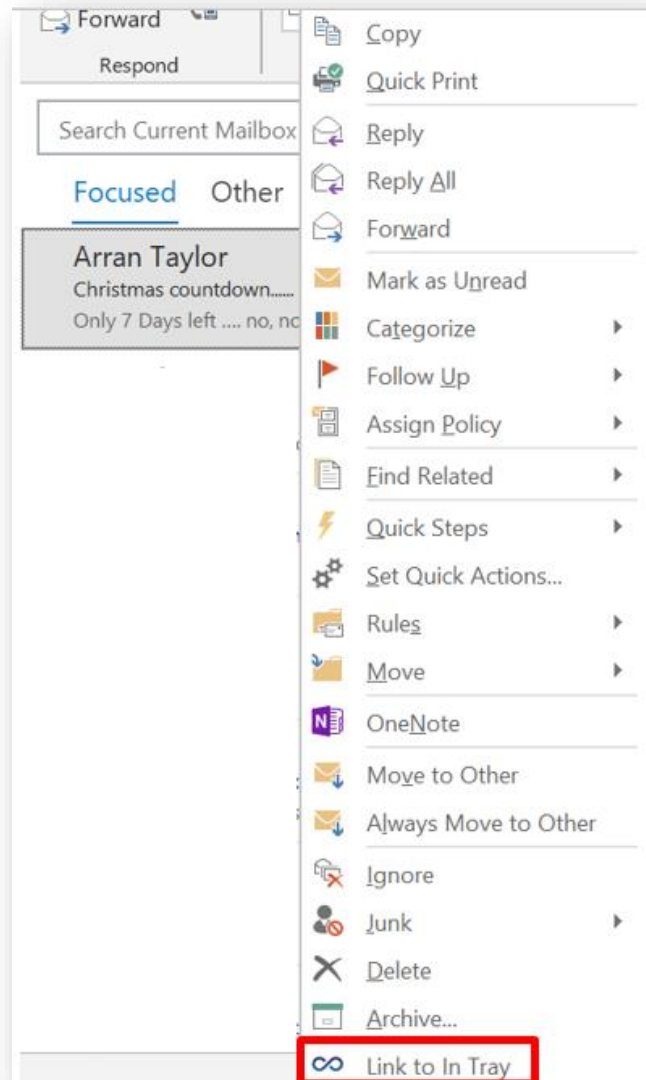
Using either of these methods will result in you being presented with the **Link To RPM In Tray** window.
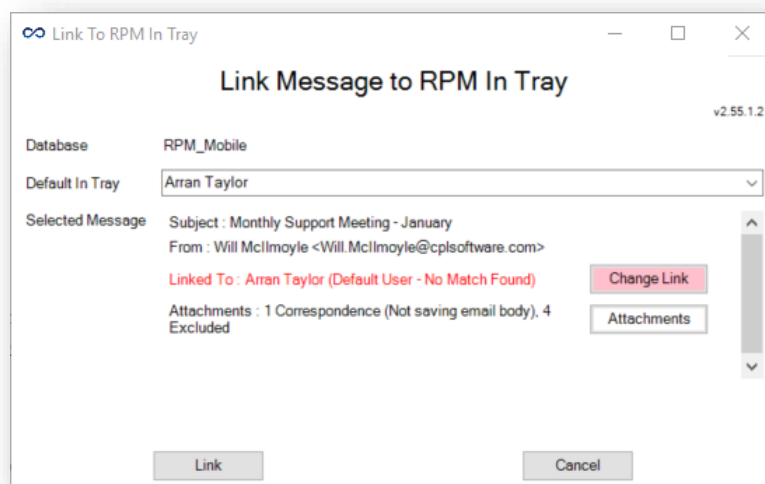
By clicking the **Change Link** button, you can change the CPL user you want to receive the linked message. You may, for example, be choosing another Property Manager you wish the document linked to. A CPL user will appear in the list if they are already set up in In-Tray.

If you click to access the Default In Tray drop-down menu it changes the associated default In-Tray for the selected file. This means that any further emails from the same person with similar characteristics will be linked to the chosen In-Tray until you change this again.

The **Link to RPM In Tray** window also provides the opportunity to check and change which document you are sending to the In-Tray. More information is provided on this below.

If all is correct, click the **Link** button and your document will be linked to the pre-populated user.

But what happens when more than one client or purchase ledger is detected to be linked to? Or you want to select only three out of six attachments?

The following two sections will explain how to change which areas in CPL the document will link to and how to change which attachments you are using from the email in question.

CHANGING IN-TRAY LINK.

When the In-Tray Add-in detects multiple matches (Clients or Purchase Ledgers) the **Linked To** field will be highlighted in red as can be seen below:
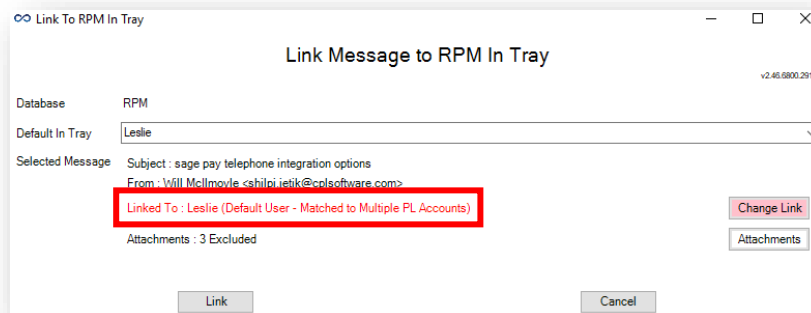
When this happens, you will notice the **Default In Tray** you set in your preferences (in this case Leslie), is selected and a message displays advising you of the issue in red text.

Clicking the **Change Link** button will open the **Change In Tray Link** window.

This window enables you to adjust which Client or Purchase Ledger Account the document is linked with and which Property Manager's In-Tray will receive the documentation.

This window has various filter options available to help you be specific about where your file is going to.

The main body of the screen displays the email that the documentation was attached to including the to and from information, the date sent and the subject field.

On the right of the screen, you will see two boxes. These are labelled as **Matched Clients** and **Matched PL Accounts**. This is where the clients and/or purchase ledger accounts matching the documentation you are uploading will be displayed for you to select from.

The system will make suggested matches for these based on criteria such as:

- email sender address
- email recipient and their role within CPL
- type and title of document.

You can accept these matches or you can use a series of filters across the bottom of the screen which will allow you to make your own selections.

There are two available fields on the left which will display on an as-required basis. In the sample screenshot above only the field for **Matched Users** appears. You may also see a **Matched PL Accounts** filter as can be seen in the screen below:

On the bottom right of the screen there are another two filters available for **All PL Accounts** and **All Users.**

In addition to the filters explained above, there is an **Advanced PM Search** button available. This allows you to be even more specific with your selections using options such as **Client Name**, **Reference**, **Property Address**, **Development Name** and **Development Number**.
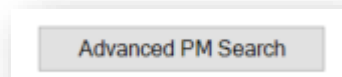
When you have made your selection from the available filters and found the Client or PL Account you wish your documentation to be linked to, click the **Link To** button below each filter. This will create the link and display a green tick below the option you choose.

If you see a red **x** instead of a green tick this means the selection has been changed but not linked.

You may now exit this screen by clicking the **x** at the top-right of the window.

The **Change Attachment Selection** window is another option for customisation. You will find an explanation of this in the next section below.
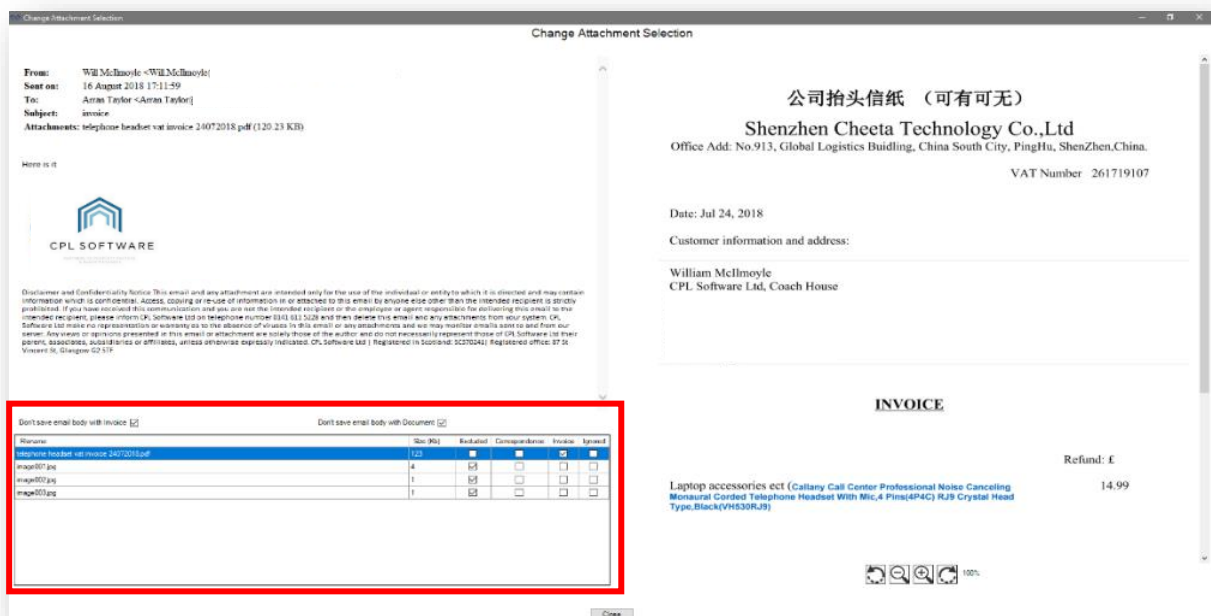
CHANGING ATTACHMENT SELECTION.

On the **Link Message to RPM In Tray** screen there is also an option which allows for further customisation in linking your documents by deciding which attachments from an email you would like to link.

To change the documentation being forwarded to the **CPL In-Tray** system, click the **Attachments** button on the **Link Message to RPM In Tray** window.
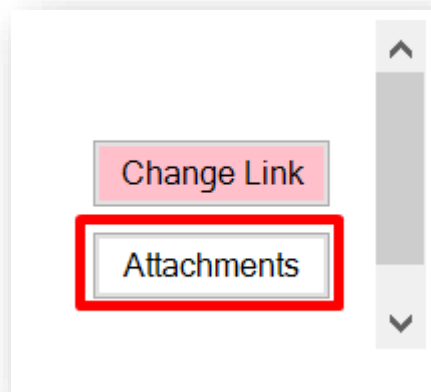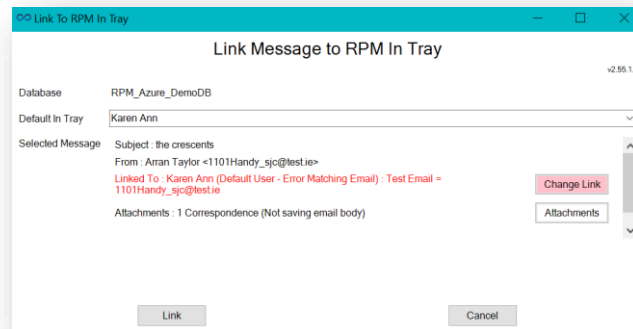
This will open the **Change Attachment Selection** window. This screen allows us to select which attachments we are forwarding to the In-Tray.

When the **Change Attachment Selection** window opens, you will be presented with a preview of the original email (on the left), and the selected attachment or attachments (on the right).

In the bottom left-hand corner, you will find a grid with options available to you.

At the top of this grid there are tick box options for saving the email:

- **Don't save email body with Invoice** and
- **Don't save email body with Document**.

Untick the appropriate option if you want to save the email alongside the invoice or document attached.

Underneath these options is a document selection matrix as you'll see more clearly in the screenshot below. The matrix contains various columns of information about the files attached to the email you're working with. This information should help you decide which attachments you would like to choose to link through to CPL.

The first two columns in the matrix are the **Filename** of the attached file and its **Size**.

As we work our way across to the right, the next three columns contain tick boxes which you will be able to use to set the conditions for linking these attachments.

The first column is the **Excluded** tick box option. By placing a tick in the box here, you can instruct the system to ignore the document for this specific email only. Without a tick in the **Excluded** box you are instructing the system to include the document.

The next two columns are the **Correspondence** and **Invoice** tick box options. These allow you to categorise the type of document you are linking through to CPL. This will allow CPL to send them through to different in-boxes in In-Tray and then allows them to be sorted into different areas within CPL. These will originally default to what the In Tray Add-in determined them to be.

The last column is the **Ignored** tick box. Ticking the box in this column will allow you to have a particular attachment ignored for this and all future emails from this sender. For example, if you regularly receive

emails from a contractor with attachments as part of their signature you can instruct the system to ignore these. The system will ignore this file whenever it receives it attached to an email from the current sender's address. Please note, this selection only applies to the local installation of CPL on your device and not for all other users in your office.

Once you have made your appropriate selections, click on the **Close** button at the bottom of the screen. This will close the **Change Attachment Selection** window and you will be returned to the **Link Message to RPM In Tray** screen where you can click **Link** to send the documentation to CPL.
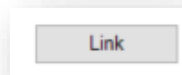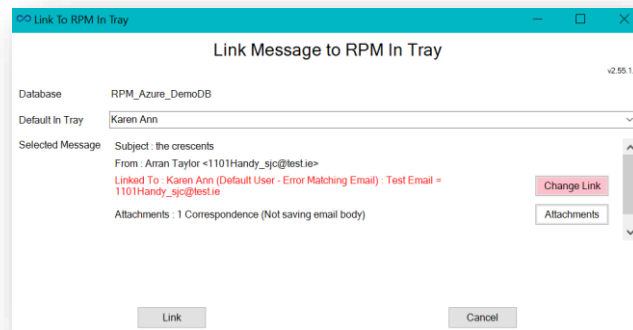
RPM IN-TRAY EXCHANGE SERVICE AND OUTLOOK IN-TRAY ADD-IN INTEGRATION

If your company is using the RPM In-Tray Exchange Service there is a separate guide available which explains how this works. The Service runs on a Windows server, and is set up and maintained by CPL Software. Users do not interact directly with the Service, and won't see any extra software on their machines. Nor will they need to change how they work.
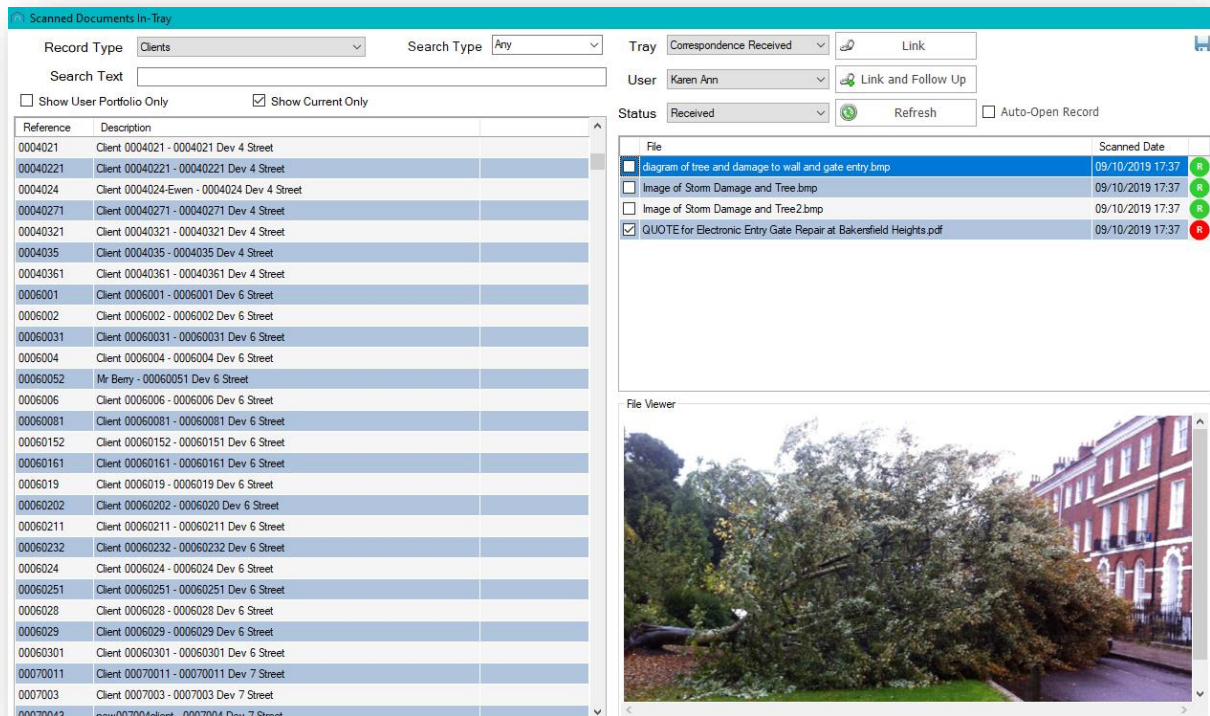
IN-TRAY – MAIN SCREEN

To open In-Tray in CPL, click on **Tools** in the menu bar and scroll down through the options until you reach the **In-Tray** options. Click on **In-Tray**:
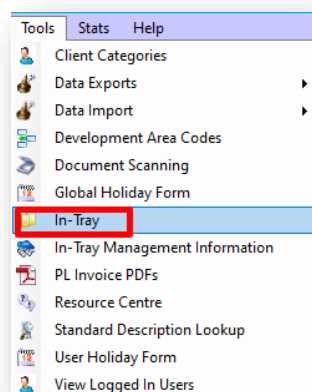
There is an additional link to the In-Tray Management Information tool which we will return to later.

Selecting **In-Tray** from the **Tools** menu opens the **Scanned Documents In-Tray** window which is the main In-Tray screen. Assuming you have already scanned or saved files to your nominated folders within the In-Tray directory then this screen will allow you to link these files to desired records within CPL.
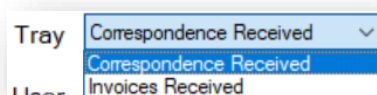

All areas of this screen will be explained in detail below. The following section on **Linking and Posting Files in the In-Tray** (on page 25) will take you through the process of finding your file or invoice and linking this to an area in CPL.

The fields at the top of this screen are a series of filters which can be used to help you find the type or document you would like to link and the area in CPL you would like to link this file to.

To begin this process it makes sense to start with the fields on the right of the page which will enable you to locate the correct file to work with.


The **Tray** filter can either be set to **Correspondence Received** or **Invoices Received**. The items in the In-Tray grid on the right of the window will change depending on your selection.

As was previously mentioned in the section related to setting up In-Tray, there are two file directories in CPL for In-Tray for every user. There is a directory folder for documents and one for invoices. Files can be copied into these directories or linked directly to the In-Tray module from Outlook using the **Link to In Tray** Add-in or the Exchange Service. Making a selection in this field will change what displays in

the **Record Type** field on the left as invoices and documents are generally treated differently in the system. This will therefore control the options for linking from each tray.

Under the **Tray** field you will see the **User** field.

The **User** field allows any user set as a 'supervisor' to view the in-tray documents/invoices for themselves as well as anyone sitting below them in the hierarchy. If you have the appropriate permissions you can use the drop-down menu to select another user to view their In-Tray content.
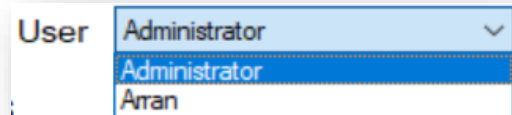
Once you have selected a **Tray** to see a type of file and a **User** to view the files of that type for a specific user a list of files will be displayed in the In-Tray File area on the right. Clicking on a file will allow you to see it in the **File Viewer** below.

The **File Viewer** field is a preview pane for any file in the In-Tray. If files have similar titles this should allow you to decide on the specific file you are trying to locate. Please note: it is not currently possible to preview all types of files, however, the most common such as Microsoft Word, PDF, JPEG, BMP will all load a preview in the **File Viewer**.

You will notice when you are viewing the In-Tray itself that on the right you will see red, amber and green traffic light symbols against each file. There is a System Setting within CPL which controls the amount of time, in hours (based on your company's SLA's), after an in-tray file is received to change the traffic light colours.

These are the defaults:

- An item will become amber after 48 hours
- An item will become red after 96 hours.

This can be set for a number of correspondence types including emails (.msg), pdf's, doc and docx, invoices, memos and images.
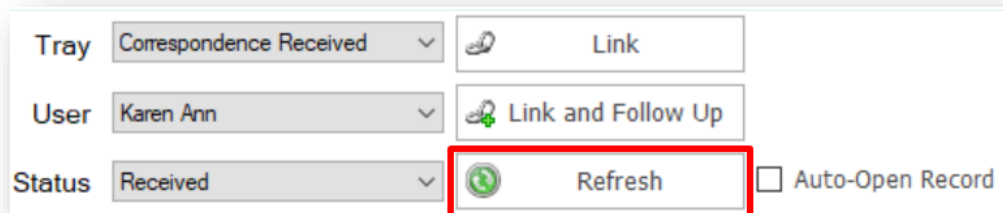
Inside these traffic-light symbols you will also notice letters which give additional information related to the status of each file.

You may notice the following:

- **Missing (Mi)**
- **Pending (P)**
- **Allocated (A)**
- **Received (R)** or **(G)** if generated from a mail merge
- **Ignored (I)**
- **Merged (Me)**
- **To Do (T)**

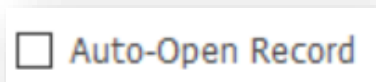There will be further explanation of these letters in the status options section below.

Clicking the **Refresh** button will refresh the content within the In-Tray and display item(s) which may have been added whilst the In-Tray was already opened.

Auto-Open Record – if selected, this tick box allows you to have the destination area in CPL opened after you click to link your file to it.
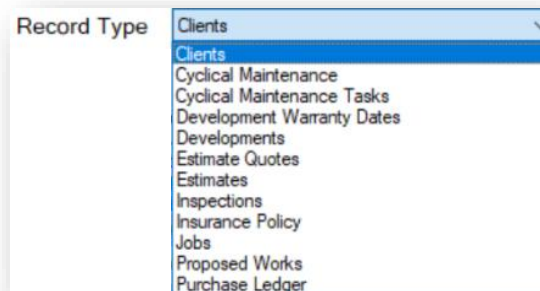

Once you have used the filter fields on the right to locate an individual file, you can use the filter fields in the top-left of the screen to help you find the area in CPL you would like to link this file to.

When you apply the filters the search results will display in the **Reference/Description** grid.

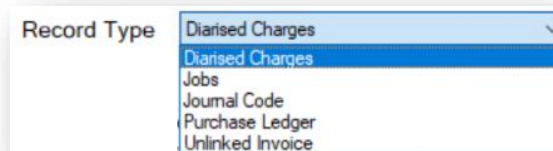Below is a description of each of these fields:

The **Record Type** field allows you to filter for areas or modules within CPL to link your file to. Documents can be linked to Clients, Cyclical Maintenance Templates and Cyclical Maintenance Tasks, Developments, Development Warranty Dates, Estimates, Estimate Quotes, Inspections, Insurance Policies, Jobs, Proposed Works, and Purchase Ledgers.

Invoices can be linked to Diarised Charges, Jobs, Journal Codes, Purchase Ledgers, and Unlinked Invoices. These are the options which appear in the drop-down menus depending on whether you have set your **Tray** field to **Correspondence Received:**
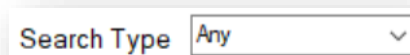

or **Invoices Received**:

Once you have set the **Record Type**, you can use the **Search Type** to further narrow your search. This will only be available for certain record types.

The **Search Text** field allows you to search for reference numbers, names, descriptions, etc.

With the **Show User Portfolio Only** option ticked In-Tray will only display results related to the current user. For example, a Property Manager will only see Developments or Purchase Ledgers relevant to them. If this is not ticked you will see all Developments or Purchase Ledgers within CPL.

With the **Show Current Only** option ticked, only current Clients, Developments and PL Accounts will be able to be viewed. Similarly, any Jobs, Estimates, Proposed Works which aren't completed or cancelled will also be available to be selected.


These filters should enable you to locate the module or area you would like to link an individual file to.

The **Save** icon in the top-right corner allows the user to save their selections from the filters across the top of the In-Tray screen. You can save your selections from the following fields: **Record Type**, **Search Type, Tray** and **Status**.

For example, if it suited your working practice to have the In-Tray load with pending documents displayed, select **Pending** from the **Status** menu and click the **Save** icon and this will load pending documents every time the In-Tray module is opened.

After clicking on the icon to save your selections you will see a pop-up window telling you that your default In-Tray preferences have been saved.
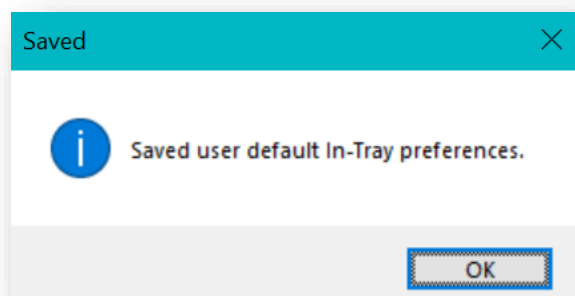
## SETTING AND USING THE STATUS OPTIONS IN IN-TRAY

The **Status** field (on the right in the main In-Tray screen) contains filters which can control what can be seen in the documents/invoices in the In-Tray window on the right. This will only apply if the In-Tray items have been set different statuses.
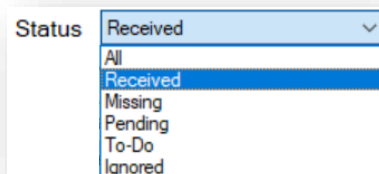

Below are explanations for the various options for this filter.

- **All** – displays all files, regardless of their status.
- **Received** – only shows files that have not yet been processed.
- **Missing** – shows all missing or deleted files.
- **Pending** – a file which is pending has been linked to a record. However, it will stay within the In-Tray until it has been allocated to this record. This status can be used as a reminder to complete a certain piece of work.
- **To-Do** – a file which is not yet linked to a record. You can set a date/time against it to follow up at a later date.
- **Ignored** – moves your document out of the In-Tray into a separate area for 'Ignored' documents. For example, email signatures which arrive as attachments or headers and footers from documents or junk email.
- **Merged** – shows all individual files which were merged into combined files, and are thus no longer used.

There is an option available within CPL **System Parameters** called **Rename In-Tray File Status Types** which allows you to customise the names of the status that you wish to use on a company-wide basis.
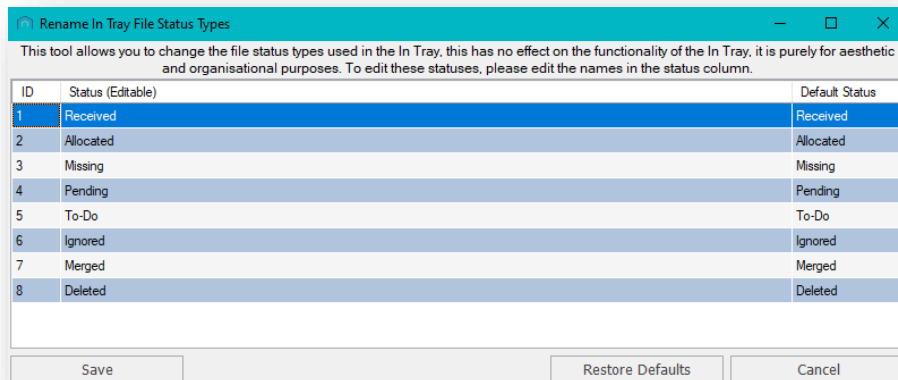

If you right-click on any single file in the In-Tray you will see you have various options available to you. The options available in the drop-down menus are the same regardless of whether your **Tray** filter is set to **Correspondence Received** or **Invoices Received**.
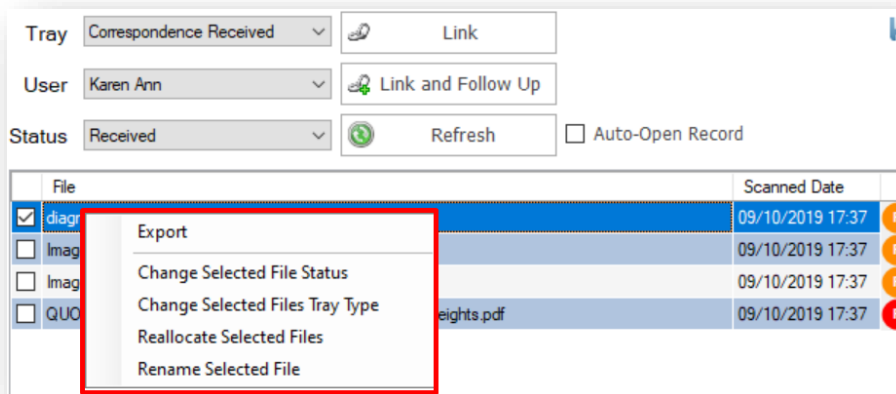
Each of the options in this drop-down menu are explained below.

Choosing **Export** will allow you to export the contents of the grid out to a file. You may want to create a report from the contents of the In-Tray. It will open the **Grid Print/Export** window below.

There are options to add additional fields to the grid before choosing to **Print**, **Export to PDF** or **Export to Excel** for further manipulation.
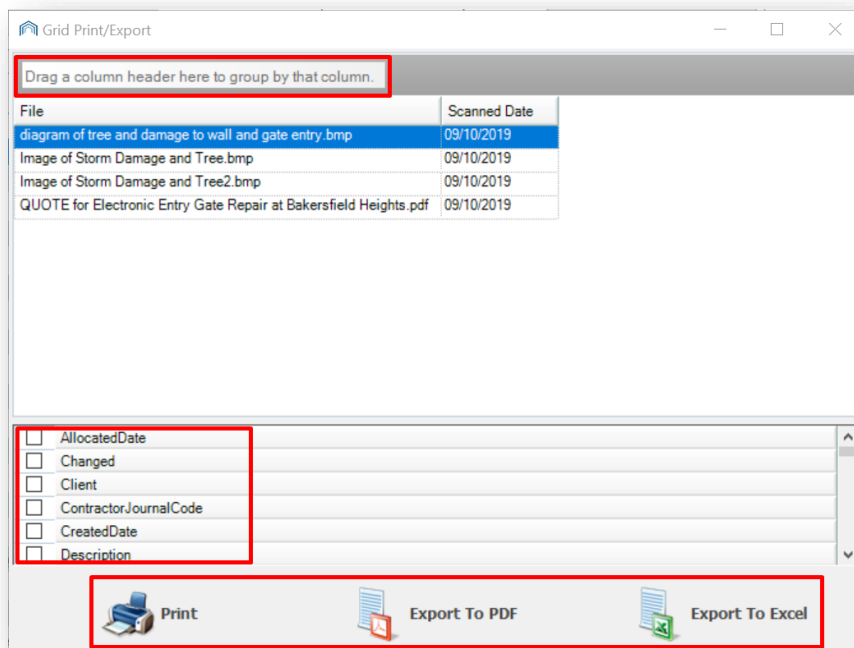
Choosing **Change Selected File Status** will allow you to change the status a particular file is classified under. This is mainly for organisational purposes to enable you to use the main **Status** filter in order to change what you are viewing in the In-Tray. The default options available are listed above under the explanation of the **Status** filter.

As mentioned above, there is an option available in **System Parameters** called **Rename In-Tray File Status Types** which allows you to customise the names of the status you wish to use.

Choosing **Change Selected Files Tray Type** will allow you to reclassify a particular file from 'Correspondence Received' to 'Invoices Received' or vice versa. You will be asked to confirm when you choose this option:
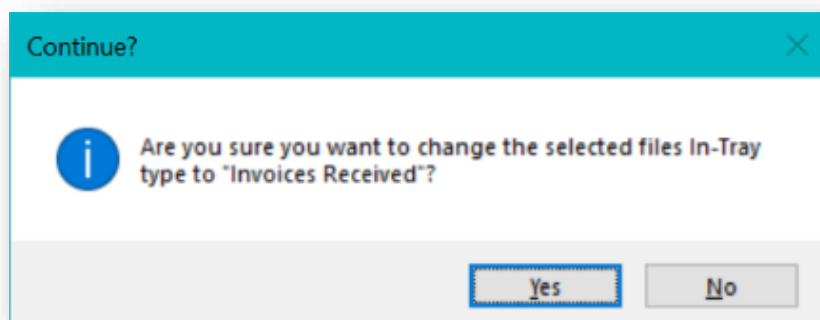
If you choose the **Reallocate Selected Files** it will open the **Reallocate Selected Files** window. Using this window, you will be able to reallocate the file to another user, and/or change it to another document type of Correspondence Received/Invoices Received.

Click on another user's name to select them if you wish to reallocate the file and then click on **Transfer Allocation**. If you wish to change the **Document Type** then set the selection for this using the drop-down menu and then click the **Transfer Allocation** button.
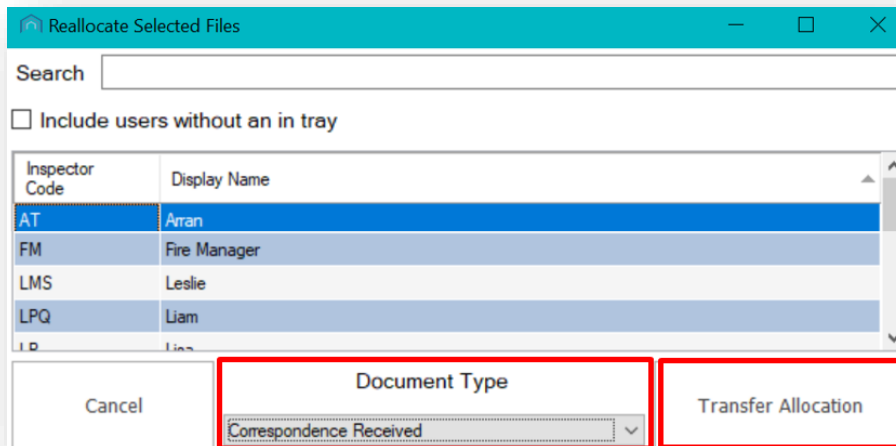
If you choose **Rename Selected File** you will be able to choose to rename the file. This might be useful if a file has been sent to you without meaningful/appropriate filenames. Add the **New Name** within the box and click on the **Rename** button.
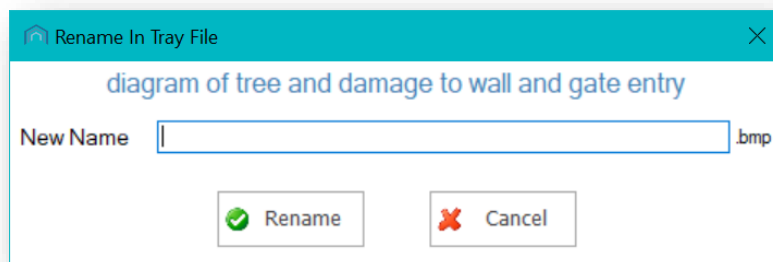

If you right-click with any two or more items selected with either **Correspondence Received** or **Invoices Received** selected for the **Tray** you will see the following menu of options.
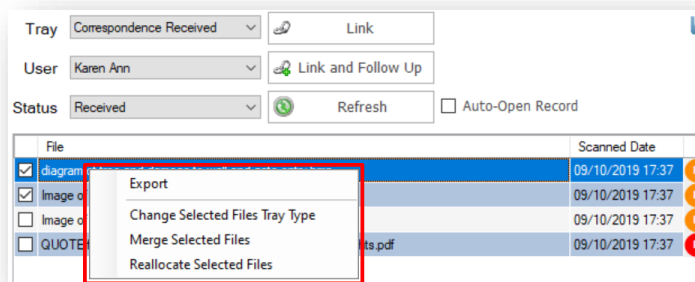
You will be able to choose to **Export**, **Change Selected Files by Tray Type** or **Reallocate Selected Files** as above but this time for multiple files in the In-Tray.

You will also get the option to **Merge Selected Files**. Selecting this option will open a **Merge In Tray Files** window which will allow you to create a PDF of several files. You will get the option to re-order how the files appear and create a new filename for this PDF.
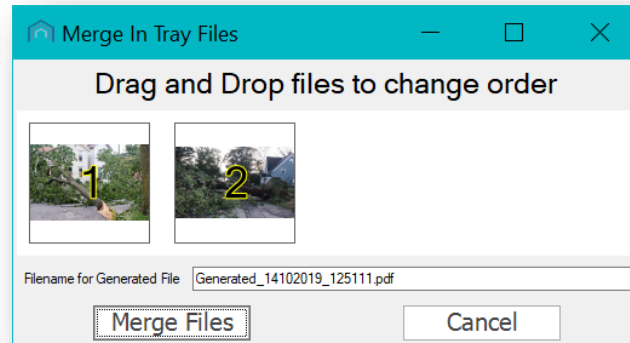
Please note that this option will not be available if the System Setting **DisableInTrayMergeFunction** is turned on.

LINKING AND POSTING IN THE IN-TRAY

If you have used all the filters on the screen to find and specific file you would like to link to a particular destination, you are now prepared to link these files. There are two options to do this.
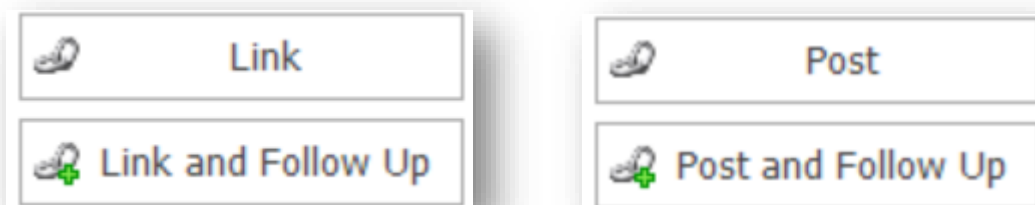

The available buttons will say **Link** and **Link and Follow Up** if you have your **Tray** set for **Correspondence Received** and **Post** and **Post and Follow Up** if you have your **Tray** set for **Invoices Received**.

The **Link/Post** button will link the file/invoice to the selected record in CPL via an appropriate tab. An additional window will open to take you through the next part of the process. This could be a **Documents Received** screen or a **Post Proposed Invoice** screen. Follow through the fields available on the additional screen as appropriate.

The **Link and Follow Up/Post and Follow Up** button will link the file/invoice to the selected record in CPL via an appropriate tab. An additional window will open to take you through the next part of the process. This could be a **Documents Received** screen or a **Post Proposed Invoice** screen. Follow through the filter fields available on the additional screen as appropriate. However, it also marks the document/invoice with a status of 'pending' which would allow you to use it as a reminder to return to later.

Taking a scanned letter that you wanted to link to a particular client as an example, start by using the filters on the right to find your letter. You can then use the filters on the left of the screen to select a destination.
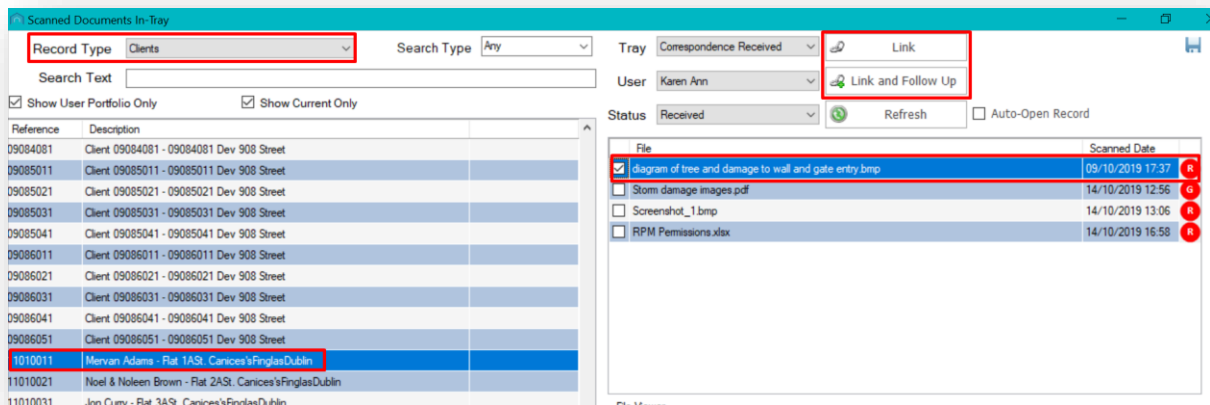
Select the scanned letter from the file grid on the right. You can preview your selection if you wish to using the **File Viewer**. Locate the client by searching for their name or account number using the filters on the left of the screen.

If the file has been added to the In-Tray via the Outlook In-Tray Add-In or the Exchange Service, then it will contain extra information on the Client or PL Account it was linked to. Clicking on the file in the right-hand **File Selector** will then auto-select the relevant record in the left-hand list. If required, it will also change the 'Record Type' selector to match, for example if the 'Record Type' is currently 'Developments' and you click on a file linked to a client, the 'Record Type' will change to 'Clients' and then you can select the correct client from the list.

Once you have located both client and document/invoice you can click **Link/Post** or **Link and Follow Up/Post and Follow Up**.

VIEWING LINKED FILES

Once you have linked a document to one of your selected destinations in CPL you will be able to view the document from within the document screen in this area. Any documents which have arrived into CPL via the In-Tray module will have a tracking icon displayed in the pin panel and if users hover their cursor over this icon they will be presented with a brief summary of that document's history.

This **In-Tray Tracking** information is also available from within the In-Tray itself, by hovering over the same icons down the right-hand side of the files list.

POSTING INVOICES THROUGH IN-TRAY

Posting invoices through In-Tray allows you to follow the invoice through the system and keep track of these better than ever before.
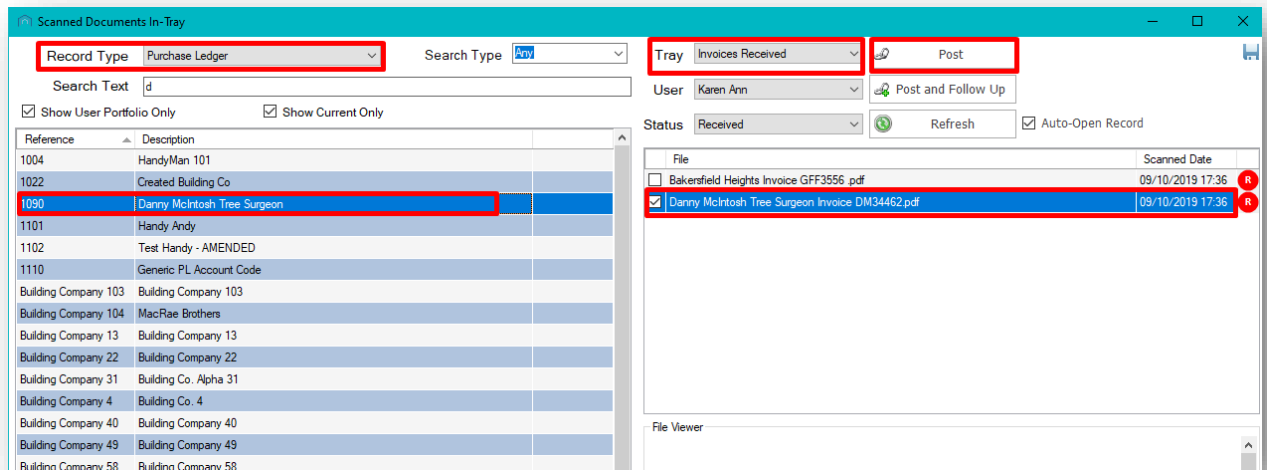
In this example, you want to post a contractor invoice through to the Purchase Ledger for this contractor. This could have gone into the In-Tray using the Outlook Add-in, the Exchange Service or from a scanner in your office.

On the main In-Tray window, select your **Tray** as **Invoices Received** and select your **Record Type** as **Purchase Ledger**.

Select the relevant Invoice from the In-Tray grid on the right and the appropriate Contractor from the grid on the left.

If the invoice came in through the Outlook In-Tray Add-In or the Exchange Service, selecting the relevant Invoice from the In-Tray grid on the right will usually select the linked Contractor from the grid on the left for you.
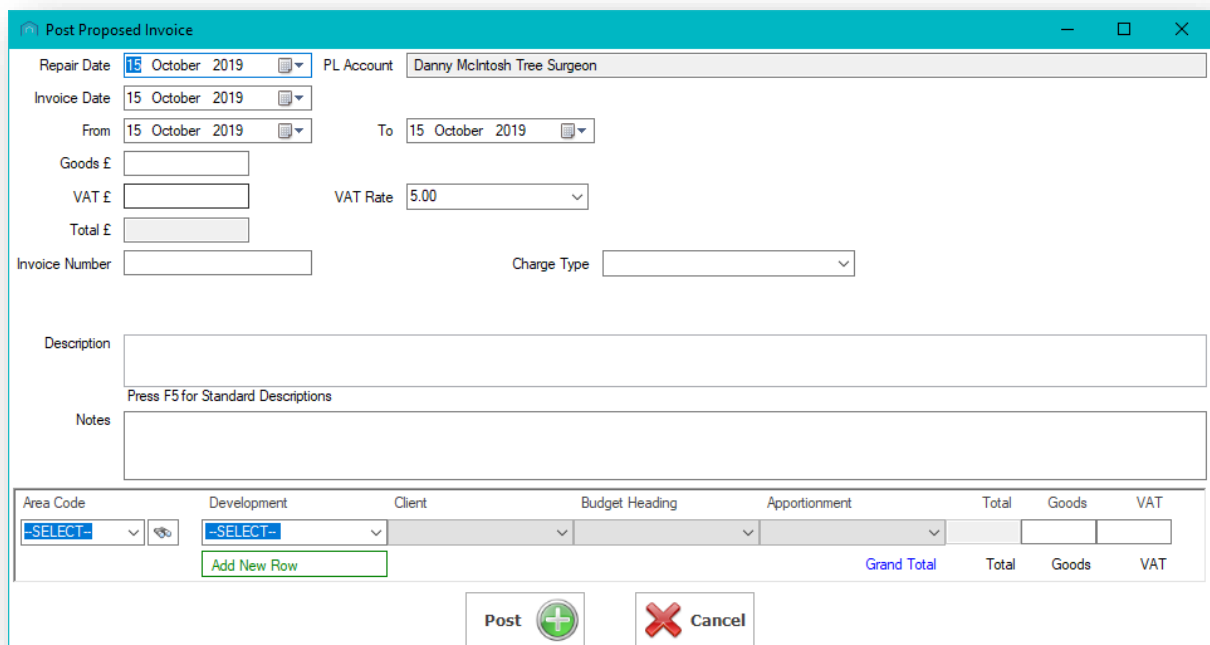
You can then click the **Post** button in the top-right.

You will be presented with the **Post Proposed Invoices** screen and a **File Previewer** screen with a preview of your file so that you can check amounts for entering into the Post Proposed Invoices screen.

If you have the required level of permissions you will be able to move through various screens to post your invoice directly to the Hold File if required.

Otherwise, your invoice will go to the **Proposed Invoices** tab in CPL.

From this main tab in CPL, Proposed Invoices can be viewed, accepted, amended or deleted by a user with the correct access privileges (usually a line manager) prior to being processed on to the Hold File as normal.

If you can't find a particular proposed invoice then use the search filter fields at the bottom of the screen to help you locate it.

Double-click on a proposed invoice to open it up or click to highlight it and choose to **Amend** or **Accept** it by clicking on the icons in the **Pin Panel.**
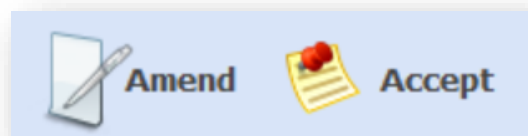
IN-TRAY MANAGEMENT INFORMATION

The **In-Tray Management Information** screen is accessed from the Tools menu within CPL. It provides the user with a hierarchical overview of all users, their documents and their status. Using the example below, you can see that this 'Administrator' user is 'Supervisor' to Brian, Brain supervises Arran and Karen-Ann and you could expand further to see who Karen-Ann supervises. As mentioned, the grid gives an overview of all the In-Tray documents for each user listed if they sit below them in the hierarchy.

When you click on one of the users in the upper window, the grid in the lower window shows their In-Tray content. We have selected the user 'KarenAnn' which means the content displayed is documents relating to 'KarenAnn' along with documents related to all users beneath this user in the hierarchy.

The column on the far right-hand side of the lower window shows the traffic light status for each file. In addition, you may also see blue icons for **Missing (Mi)** or **Pending (P)** documents. These may become orange or red based on service level agreements controlled by your settings for In-Tray. Other status letters you may see are **Allocated (A)**, or **Received (R)**, or **Generated (G)**.

Access to the **In-Tray Management Information** screen can be controlled by a set of In-Tray permissions. For further information on setting permissions and groups, please see the **Setting Permissions for Users in CPL Training Guide**.

IN-TRAY SUMMARY INFORMATION IN THE DASHBOARD

If you use the CPL **Dashboard** you will be able to access summary information within this for In-Tray. When a user opens CPL and checks the **Dashboard**, they will be presented with an **In-Tray** card containing an information summary for In-Tray documents.

The Dashboard also uses the red/amber/green traffic light system to identify how many outstanding documents or invoices you have in your In-Tray. Depending upon your position within the hierarchy

which has been set for your organisation, it may also give you a summary of the outstanding documents for your staff members' In-Trays.

Clicking on the link in the Dashboard card opens up the **Management Information Screen** for In-Tray (mentioned above) which gives additional information.

You Have 4 Correspondence Outstanding (1) (0) (3)

You Have 2 Invoices Outstanding (2) (0) (0)

Name	Correspondence						Invoices					
	Theirs			Staff			Theirs			Staff		
	🔴	🟡	🟢	🔴	🟡	🟢	🔴	🟡	🟢	🔴	🟡	🟢
⊟ Crawford	0	0	1	214	0	1	0	0	1	117	0	1
├ Arran	0	0	1	0	0	0	0	0	1	0	0	0
├ Fire Manager	0	0	0	0	0	0	0	0	0	0	0	0
├ Lisa	0	0	0	0	0	0	0	0	0	0	0	0
⊞ Sindy	39	0	0	175	0	0	4	0	0	113	0	0

Please note, if you don't currently have access to the Dashboard in CPL, then please feel free to contact CPL Support to discuss this further.

In the **Management Information Screen** above you can see that there is summary information at the top of the screen concerning your own outstanding documents.

Below this, there is a grid with an expandable tree structure which will show outstanding **Correspondence** and **Invoices** for members of staff you are responsible for and the members of staff they are responsible for. This information is the same as when you open the In-Tray Management screen, as described above.

Name	Correspondence						Invoices					
	Theirs			Staff			Theirs			Staff		
	🔴	🟡	🟢	🔴	🟡	🟢	🔴	🟡	🟢	🔴	🟡	🟢
⊟ Crawford	0	0	1	214	0	1	0	0	1	117	0	1
├ Arran	0	0	1	0	0	0	0	0	1	0	0	0
├ Fire Manager	0	0	0	0	0	0	0	0	0	0	0	0
├ Lisa	0	0	0	0	0	0	0	0	0	0	0	0
⊞ Sindy	39	0	0	175	0	0	4	0	0	113	0	0

Across the top, the grid is divided into **Correspondence** and **Invoices** and these are further subdivided into columns for **Theirs** and **Staff**. These columns display information for each staff member on a red, amber and green basis for any outstanding correspondence and invoices.

Down the left-hand side of the grid, you can click on the **plus** icons to expand the tree of staff who report to you. The **plus** icon at the top of the grid will expand or contract the whole tree and the plus icons next to names within the tree will expand or contract that section of the tree.

In the example above you will note that Sindy reports to Crawford, who reports to the user currently logged in. You can see that:

- Sindy has 39 items of correspondence which have been outstanding for more than 96 hours.
- Members of staff who report to Sindy have a total of 175 items of correspondence which have been outstanding for more than 96 hours.
- Sindy has 4 invoices on a red outstanding basis.
- Members of staff who report to Sindy have a total of 113 invoices on a red outstanding basis.

If you wanted to view the breakdown for each of these members of staff you could click on the **plus** icon to the left of Sindy's name.

NOTIFICATIONS RELATING TO IN-TRAY

You will also receive **Notifications** (if you have these turned on in CPL) about items which have been added and linked to you:
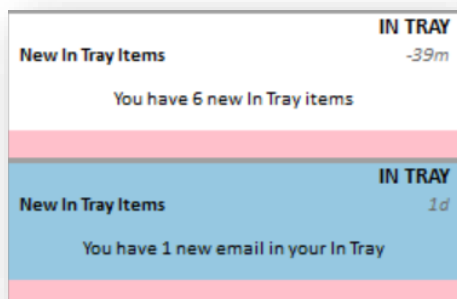
If you wish to alter these from the default setting please get in touch with the CPL Support Team.

CPL KNOWLEDGE BASE

This training guide forms part of CPL's Knowledge Base which is available for all CPL users at https://contact.cplsoftware.com/portal/home

The CPL Knowledge Base will be continually updated with additional guides and information. If you have any questions or suggestions for further guides we'd be happy to hear from you. You can contact CPL Support by emailing us at support@cplsoftware.com or through our portal at https://contact.cplsoftware.com/portal/home or calling us on 0345 646 0240 (option 1).