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Support contact details
Quick support contact details

The PRU has its own dedicated technical support team available
Monday to Friday 9am-5pm

Jo Antoniewska - IT Support Analyst
e: prusupport@parliament.uk / antoniewskaj@parliament.uk
t: 02072195995

Nick Roberts - IT Systems Manager
e: robertsnh@parliament.uk
“I have lost my Yubikey!”

A new Yubikey can be obtained from PRU support. Alternatively, users can choose to share a colleague's device. To set a Yubikey to your profile plug the Yubikey into a spare USB port in your computer, go to the Users option, select your account from the drop-down list, place the cursor in the box marked ‘Yubikey’ and touch the device. The code will then be entered automatically. Click on the Update button in order to save the new setting.

“l can’t log in!”

There are various reasons why a user may have trouble logging in to Cross Reference. The most common reasons are:

- typing the incorrect username/ password
- missing reference - the reference is your MP’s name (all lower case no spaces)
- the wrong Yubikey used

“I receive an error when trying to send a Campaign email/email”

This error is most likely occurring because the password is out-of-date and needs updating. To update the password go to the Email Accounts option located on the main menu and enter the new password.
Cross Reference toolbars
Top menu bar

10

Search
1. **Add New Individual** - Manually add a new constituent to the database
2. **Show Recently Viewed Individuals** - View the last five recently used profiles
3. **Advanced search** - Search the database for individuals matching your search criteria
4. **Document Search** - Search the contents of correspondence stored in the database
5. **Surgeries** - Set up an MP’s surgery and generate a timetable with space for note taking
6. **Campaigns** - Record a lobbying campaign
7. **Reports** - Get a list of constituents who meet the criteria you set in order to generate a mail-merged response
8. **To Do Items** - View a list of tasks assigned to you or another user
9. **Open Cases** - List of cases currently open in your office which can be filtered by case owner
10. **Due and Overdue Correspondence** - List of correspondence marked for reply by a specific date
11. **Users** - Add, edit or delete Cross Reference users in your office
12. **Email Accounts** - Add Parliamentary email accounts to Cross Reference
13. **Standard Letters** - View, add or edit standard letter texts generated by your team
14. **Third Party Database** - List of people or organisations you may frequently need to contact
15. **Topics, Contact Types and Tag Updates** - Add, edit or merge these categories
16. **Templates** - Add, edit or delete a Word letter template
17. **Email Templates** - Add, edit or delete an Outlook email template
18. **Statistics** - View statistics such as turnaround time, number of open/closed cases
19. **Dashboard** - View the dashboard
20. **Search** - Search the database for individuals matching your search criteria
21. **Alerts** - Indicates actions waiting to be dealt with
Secondary menu bar (individuals)
1. **Edit Individual** - update an individual's details

2. **Show All At this Address** - View a list of individuals living at this address

3. **Show this Address on a Map**

4. **Delete Individual** - Permanently delete an Individual from the database. Cannot be undone.

5. **Add a Contact** - Add a new contact detail to this constituent

6. **Add Tag** - Tag an individual

7. **Add Note to Individual** - Save a note about this individual

8. **Create a Blank Letter** - Create a new letter

9. **Create a Standard Letter** - Create a letter from your team's database of standards

10. **Create a PRU Letter** - Create a letter based on standard letters provided by the PRU (PRU subscribers only)

11. **Record Other Communication Out** - Record any other type of correspondence sent to or about an individual

12. **Create a Blank Email** - Generate and send a new email

13. **Create a Standard Email** - Generate and send an email from your team's database of standards

14. **Create a PRU Email** - Generate an email based on standard letters generated by the PRU (PRU subscribers only)

15. **Scan a Document** - Scan a document on paper directly into Cross Reference

16. **Capture an Email** - Import selected emails from Outlook into Cross Reference

17. **Capture a File** - Capture any other file stored on your computer or a shared drive

18. **Record Other Communication In** - Record any other type of correspondence sent by or about an individual

19. **Add To Do Item** - Create and assign a task concerning this individual to another user in your office

20. **Print Summary Details** - Generate and print a summary of case or non-case correspondence for an individual

21. **Add to Surgery** - assign a surgery slot to an individual

22. **New Case** - Create a new case for a constituent

23. **Copy Name and Address to Clipboard** - Quickly copy individual's data to the clipboard

24. **Refresh this Page** - Reset this page to its opening view

25. **Merge Individuals - Set as Master** - Merge individual’s records if duplicated. This will set the individual as a Master profile to merge data to. See page 36 for more details

26. **Merge Individuals - Set as Sub** - Merge individual's records if duplicated. This will set the individual as a Sub profile, to merge data from. See page 36 for more details
Getting started with Cross Reference
What is Cross Reference?

Cross Reference is the PRU’s constituency correspondence management system, developed specifically for Members of Parliament and their staff. It is not reliant on Digital Services computers or storage, the information is cloud-based so it is accessible on the move through our web-based companion product via your iPad, iPhone or other connected tablet or smartphone. Its main purpose is to help MPs’ staff to manage their casework better, and provide a more efficient way of recording any correspondence between the MPs’ offices and constituents.

Key Advantages of Cross Reference over other applications

- Integrates with your Digital Services supplied software so you can carry on using the systems you are familiar with such as Word, Excel and Outlook
- Fits in with your way of working and does not impose any particular methods or routines on you
- Quickly records correspondence from constituents received by email, letter or other means
- Easily creates letters to constituents, Ministers or other third parties, and stores them as Word documents or PDF files to send by post or email
- Quickly captures and responds to email and postcard campaigns. You can choose to respond via email, letter or a combination of the two
- Sends email from any Parliamentary email account you have access to
- Captures emails directly from Outlook, including all attachments
- Controls your scanner directly so there is no need to scan to email
- Workflow functions are built in, making it easy to assign responsibility for tasks to various users
- Being cloud-based means all users see the same data at all times and there is no need to replicate or leave computers switched on
- Extensive mapping functions are built in so you can view all reports as maps to find out areas of concern by location
Installing Cross Reference

To install Cross Reference

• Using Internet Explorer or Edge internet browser go to https://six.crossreference.co.uk/publish.htm and click on the install button.

• Cross Reference will download and install (you may get prompted for permission to install. Enter your Parliamentary username and password and click on Run Anyway).

Name: Cross Reference 6

Version: 6.0.1.0

Publisher: PRU

Install
Logging in for the first time

The Cross Reference icon can be found by clicking on All Programs on the Start menu and then on the yellow PRU folder.

To log in to Cross Reference

- The Cross Reference login box will appear. Fill in your username (1) and password (2) and enter your Yubikey code by touching the key where the green light flashes.
- The proxy server boxes are set up automatically, there is no need to make any changes.
- Click on the Advanced options (4) and enter the Reference, which is your MP’s name, all in lower case and no spaces. So Albert Smith would be ‘albertsmith’.
- Click on the button.
Yubikeys

What are Yubikeys?

A Yubikey is a device used to securely login to Cross Reference. It can be used to access the desktop version of the application. A single Yubikey can be shared between two or more staff members.

How to use Yubikeys

A Yubikey should be placed in any USB slot of a computer. The device is ready to for use as soon as the green light starts flashing. In order to enter the Yubikey code into the login box the device should be touched lightly where the green light flashes.

What to do when I lose my Yubikey?

If your Yubikey is lost or damaged contact the PRU support at prusupport@parliament.uk to obtain a new device.

Please note that another person’s Yubikey can be set up to login with your account. This should be set via the Users option located on the top menu bar.

Note

All Yubikeys remain the property of the Policy Research Unit, and should be returned to the Policy Research Unit on request. Failure to return Yubikeys upon request may result in the cost price being charged to the office to which they are assigned.
Creating a new user

In order to use Cross Reference you need to have a user account. A user account can be set up by either another staff member or by the PRU support staff. A user will also need a Yubikey that is associated with their account in order to be able to login.

To create a new account in Cross Reference

- Go to the main toolbar
- Click on the Users button located on the main menu
- Click on the Add New button
- Fill in all the relevant information
  - **Yubikey Code** - Plug in the Yubikey which was given to you into a spare USB port and touch it where the green flashing light is
  - **Friendly name** - This is the name which will identify you to other Cross Reference users
  - **Reference Tag** - This is a code unique to you and will appear on letters written by you
  - **Reference Format** - This defines how the different elements and some other items appear in the final reference that is added to letters.
  - **Date Format** - Date formats used in Cross Reference are very flexible, with some examples below
    
    
    d MMMM yyyy = 2 February 2016
    d MMM yyyy = 2 Feb 2016
    dd MMMM yyyy = 02 February 2016
    dd MM yyyy = 02 02 2016
- Click on the Update button when you have completed filling in the form
- Close the tab by clicking on the white cross on the tab heading
Deleting a user

**To delete a user**

- Click on the button locate on the top menu bar
- The **User Management** tab will appear
- Select the user you wish to delete from the drop-down list
- Click on the button
- A **Confirm Delete Box** will appear, click on **Yes** to delete the user.

**WARNING:** If you say yes to delete the action cannot be reversed

Editing your own details

**To edit your own details**

- Click on the button
- The **User Management** tab will appear
- Select your name from the drop-down list
- Edit the required details
- Click on the **Update** button to save the changes
Dashboard

1. **Tips of the Day** - Weekly useful tips generated by the support team
2. **Overdue Correspondence** - List of correspondence that is overdue for reply
3. **Cases/Actions Overview** - List of tasks and cases assigned to you or to your team members
4. **Popular Topics** - Most popular topics in a given period
5. **Correspondence Map** - Recent correspondence plotted on a map
6. **Surgeries** - A list of surgeries set up by the office
7. **Volume of Cases** - Amount of cases opened and closed in a given period
8. **Turnaround Time** - The speed with which cases are dealt with in a given period
9. **Help** - PRU support contact details
Reference Tags - How do they work?

What are Reference Tags?

Reference tags are used in letters. They are made up of text and code. Any combination of text and code is allowed. It can be seen how the reference tags work in the table below.

How do Reference Tags work?

The reference format is made up of text and code. All items are optional and text items can go anywhere in the reference. Any combination of text and code is allowed. You can see how the code works in the table below.

- `<User_Reference>` - this is replaced by users’ reference tag text
- `<Constituent_Initials>` - this is replaced by the constituent’s initials
- `<Constituent_Fullname>` - this is replaced by the constituent’s full name
- `<Constituent_Surname>` - this is replaced by the constituent’s surname
- `<User_Count>` - this is replaced by the Reference Count
- `<Global_Count>` - this is replaced by the Global Count
- `<Constituent_ID>` - this is a unique ID the program assigns to each individual and cannot be edited.

So if you write a letter to a constituent named John M Smith, with your Reference Count at 10, Global Count at 200 and Reference Tag of AWB and the constituent has the unique ID of 116 you would get the following results:

<table>
<thead>
<tr>
<th>Reference Former</th>
<th>Resulting Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>MP / <code>&lt;User_Reference&gt;</code> / <code>&lt;Constituent_Initials&gt;</code> / <code>&lt;User_Count&gt;</code></td>
<td>MP / AWB / JMS / 10</td>
</tr>
<tr>
<td>MP / <code>&lt;User_Reference&gt;</code> / <code>&lt;Constituent_Surname&gt;</code> / <code>&lt;Global_Count&gt;</code></td>
<td>MP / AWB / Smith / 200</td>
</tr>
<tr>
<td>MP / <code>&lt;User_Reference&gt;</code> / <code>&lt;Constituent_Fullname&gt;</code></td>
<td>MP / AWB / John Smith</td>
</tr>
<tr>
<td>MP / <code>&lt;User_Reference&gt;</code> / <code>&lt;Constituent_Fullname&gt;</code> / <code>&lt;Constituent_ID&gt;</code></td>
<td>MP / PAS / John Smith / 16</td>
</tr>
</tbody>
</table>

To make the reference print out on your letters all you have to do is insert the `<Reference>` field into your template.
Adding a new email account

Cross Reference email allows you to send emails or campaign responses to constituents from Parliamentary email accounts directly from Cross Reference. You can add multiple email account, but only Parliamentary email accounts can be linked to Cross Reference.

To add a new email account

- Click on the Email Accounts button located on the main menu
- The Email Account Management tab will appear
- Click on button
- Fill in all the relevant details

  Account Name - give the email account a name (for example, the name of the user who has the account)
  Username - The Parliamentary email address in full
  Password - The Parliamentary email account password. This is the same as the user's Parliamentary computer account password.

- Press button to save the settings.
Adding/ editing an individual

Who is an Individual in Cross Reference?

In Cross Reference an individual is another name for a constituent. Individuals can be added to the database manually or via the electoral roll register.

Electoral roll data can be obtained from the local councils that are responsible for voter registration. Once received, the file should be securely forwarded to the PRU’s technical support who will then upload it to your database usually overnight. The electoral roll can be then kept up-to-date on a monthly basis through monthly roll updates, which can also be obtained from the local council. Please contact us for details on how to forward the roll data to us securely.

NEVER SEND UNENCRYPTED ROLL DATA BY EMAIL

In order to add a new Individual manually:

- Click on the Add New Individual button
- The New Individual window will appear
- Fill in all the relevant details

  Title - The salutation
  First Name - The Individual’s first name or first initial
  Initials - Their middle initials, if any
  Last Name - Their surname
Adding a new individual - continued

**Dear** - How you would like to address them, Dear Mr Smith or Dear Albert.

**Suffix** - Enter any post nominal titles

**References** - Free text fields to use in any way you wish, for example NI numbers, CFA references

**Address** - Individual's address

**Postcode** - Their postcode

**Address Suggestions** - As you type in the address Cross Reference will make a suggestion based on any matching and previously entered or stored addresses.

- You can also add in an email address at this stage as well as electoral roll and mailing options
- Once you have completed the required the details, click on the **Save** button

To edit an Individual click on the **Edit Individual** button located on the individual's secondary menu and update the relevant information. Click on **Save** to save the new information.
Adding extra contact details

To add extra contact details to an individual

- Click on the Add contact button on the secondary menu
- The New Contact Information box will appear
- Fill in all the relevant information
  
  **Type** - Choose from the options listed. If a contact detail does not appear in the list, simply type in a new name in the box
  
  **Description** - Enter in the new contact details
- Click on the Save button to save the new details.
- The new information will appear in the Contact Details & Tags section

To edit contact details

- Go to the constituent’s details
- Click on the Contact Details tab in the Contact Details & Tags section
- Click on the Edit button beside the details to be updated and the Edit Contact box will appear
- Make the changes and click on Save

To delete contact details

- Click on the Contact Details tab in the Contact Details & Tags section
- Click on the delete button beside the details to be removed
- The Confirm Deletion box will appear.
- Click on the delete button to delete the contact

**WARNING** if you click on delete, the action cannot be reversed.
Adding multiple contact details

To add multiple contact details to an individual’s record

Go to the constituent’s details

- Right-click on the Add contact button
- The Multiple Contact Edit box will appear

- Select Contact Type - Choose from the options listed in the drop down box and then type in the new contact. You can add as many as you wish
- You can delete contact details here too. You will not get an additional warning box to confirm the deletion
- Click on the Save button to save the information
Recently used individuals

A list of **Recently Viewed Individuals** can be easily accessed through Cross Reference. The last five recently viewed profiles will be listed.

To view profiles that were recently viewed or worked on

- Click on **Show Recently Used Individuals**

- The most recently used Individuals will appear on the left hand side of Cross Reference as shown below

- The display can be hidden by clicking on the arrow pointing left. It can be brought back by clicking back on the arrow pointing right.
Tagging individuals

What are Tags in Cross Reference?

Tags are used to categorise Individuals in a specific way, e.g. an individual could be tagged according to their occupation (e.g. nurse, teacher), or area of interest.

To Tag an Individual

- Search for the Individual you intend to tag and select them
- Go to the Add Tag option
- Choose a tag from the drop down list
- If the tag is not on the list simply type the name of the new tag into the dropdown box. The tag will be automatically saved for future use
- Click on the Save button to save the new details
Viewing all individuals with the same tag

To view all individuals that were marked with the same tag

- Go to the individual’s details
- Click on the Tags tab in the Contact Details & Tags section
- To view everyone who has been tagged with this tag click on the View All People Tagged With ... button
- The All Individuals Matching tab will appear showing you every constituent who has been tagged with the same tag
Adding notes to an individual

To add a Note to an individual

• Go to the individual’s details

• Click on Add Note To Individual button

• The New Note box will appear

• Fill in the details

  Date - Choose a date
  Note - Type in your note

• Click on the Save button

• The new note will appear in the Contact Details & Tags section
Editing or deleting a note

To edit or delete a note assigned to an Individual

- Go to the individual’s details
- Click on the Notes tab in the Contact Details & Tags section
- To edit the note click on the Edit button
- The Edit Note box will appear. Make your changes and click on the Save button
- To delete a Note click on the Delete button
- A Confirm Delete box will appear
- Click on Yes to delete the note

•• WARNING if you click on yes, the action cannot be reversed
Merging individuals

What is merging in Cross Reference?

Merging two Individuals may be required when an individual changed some of their details and a duplicate contact was created. The individual record into which Individual's details should be merged into is called the master account. The account to merge from is the sub account. Setting an individual as the master account means their name and address details are retained. All other details are kept and merged together.

To merge two Individuals

• Go to the constituent's details who you want to merge into (the master account)

• Click on the Merge Individuals - set as Master button

• You will be taken to the Merge Individuals tab. All the details will be already filled in.
  If you wish you can clear the master and sub individuals or just click on Close in the tab heading and no action will be taken

• Next go to the individual's details who you want to merge from (the sub account)

• Click on the Merge Individuals - set as Sub button

• Again you will be taken to the Merge Individuals tab

• If you wish to merge the two Individuals together click on the Merge Individuals button. The merge process will take place and the sub individual will be deleted. You will then be taken the merged individual’s profile.
Searching on Cross Reference
Basic search (Individuals)

There are two ways to run a search for Individuals within Cross Reference - the basic search and the advanced search.

To perform a basic search, simply enter search text into the search box located in the top right-hand corner.

The information you can search on from here includes:

- first name and/or surname
- part of an address or postcode
- contact details
- individual notes
- case notes
- notes on correspondence
Advanced search (individuals)

The **Advanced Search** tool can be used to return more precise results.

**To perform a search**

- Click on the **Advanced Search** button beneath the search box
- The **Advanced Search** tab will appear

[Image: Advanced Search interface]

- Fill in any of the details you already have, e.g. the post code or the surname (or part of if you do not know the exact information)
- Record that match all the search criteria will be displayed when you click on the **Search** button
Document search

As well as searching for individuals, you can also perform a correspondence search. You can search by any word or text that is contained in stored Word or email document or by the document name, if known.

In order to search for a specific file on the database

- Click on the Document Search button located on the main menu.
- Enter the document text or the document name
- Choose the After or/and the Only Before date. This lets you set the range of dates within which the documents returned by the search were saved into Cross Reference
- Click on Search
Capturing correspondence to Cross Reference
Scanning documents

To scan a file into Cross Reference

- Go to the Individual’s details
- Click on **Scan a Document** which is located on the secondary menu bar

- The **Scan A Document** window will appear
- Fill in all the relevant information

  - **From** - Allows you to tell Cross Reference who sent the document; this will be either the Individual or a third party who’s details are in the **Third Party Database**
  - **Case** - Select a case if you would like to associate the document with it. Selecting a case automatically sets the topic and sub topic
  - **Topic** - Select a topic to classify the document; you can create a new topic by simply typing into the relevant dropdown
  - **Sub Topic** - Choose a sub topic to classify the document; you can create a new sub topic by simply typing into the relevant sub topic dropdown. If you are not sure if a sub topic relevant to the document has already been created click on the browse button. The **Search Topics** window will appear; search for the sub topic you need.
  - **Date** - Select the date; the current date is automatically selected otherwise
  - **Scan source** - Select the scanner you intend to use for scanning
  - **Show scanner user interface** - tick this option if you would like to be able to scan more than one document in one go

- The scan source and user interface options are stored for the next time this window is displayed

- Click on the **Scan Page** button and the document will be scanned. It will appear in the scan box to the right.
Scanning files - continued

• If you are happy with the image click on the Save button and the document (plus and any notes) will be recorded in the individual's record

• You have many options once the document is scanned before you save it, including:

  rotating pages
  reordering pages
  removing pages
Capturing emails

To capture an email in Cross Reference

- Go to the individual’s details
- Click on Capture an Email which is located on the secondary manu bar
- The Capture An Email box will appear
- Now go to Outlook and select all the emails you wish to capture. In order to capture more than one email press the Ctrl key on your keyboard and click on all the emails that you wish to capture while continuing to hold the Ctrl key.
- Click on Get Emails Selected In Outlook button
- Fill in the relevant information

Choose if the email was sent or received by your office
- **From** - is either the Constituent or an address you have entered into the Third Party Database
- **Case** - choose a case if appropriate. Selecting a case automatically sets the topic and sub topic
- **Topic** - Select a topic to classify the document; you can create a new topic by simply typing into the relevant dropdown
- **Sub Topic** - Choose a sub topic to classify the document; you can create a new sub topic by simply typing into the relevant sub topic dropdown. If you are not sure if a sub topic relevant to the document has already been created click on the browse button. The Search Topics window will appear; search for the sub topic you need.
- Next, fill in the remaining information
- **Date** - You can set the date when the email was captured; the current date will be automatically selected otherwise
- **Notes** - If you want you can add some notes about this document
- **Follow Up** - Click if this document requires a follow up; you will also be able to add some notes.
Capturing emails - continued

• If you wish to remove an email, especially if there are several you have copied over just click on the + sign.

• If the individual or third party whose email(s) you are capturing has not already had their email address recorded, you are given the opportunity of doing so. The sender’s email address will appear in the email box. Simply, click on the actual email address to highlight it and add to the individual’s record.

• If you wish to highlight any items the correspondence clears click on any file(s) showing in the Highlight Any Items This correspondence Clears.

• Click on Save Email to record the email (and notes, if any) against this individual.
Capturing files stored on a computer or a shared drive

**To Capture A File**

- Click on **Capture A File** button which is located on the secondary menu bar.

- The **Capture Files** window will appear. Fill in all the relevant fields:
  
  **File** - Select if the file was sent or received by you
  
  **From** - This is either the Individual or an address you have entered into the **Third Party Database**
  
  **Case** - Select a case if appropriate
  
  **Topic** - Select a topic to classify the document; you can create a new topic by simply typing into the relevant dropdown.
  
  **Sub Topic** - Choose a sub topic to classify the document; you can create a new sub topic by simply typing into the relevant sub topic dropdown. If you are not sure if a sub topic relevant to the document has already been created click on the browse **...** button. The **Search Topics** window will appear; search for the sub topic you need.

- Click on the **+** button to select the sub topic.

- Next, fill in the remaining information:
  
  **Date** - You can select the date the file was captured on, the current date is automatically selected otherwise.
  
  **Type** - You can choose what type of file it is.
  
  **Reply Needed** - tick if a reply is needed and specify the date.
  
  **Notes** - If you want you can add some notes about this document.
Capturing files - continued

• Click on the **Select A File...** button and browse your PC for the file you want. Once you have selected the file it will be added next to the **Files Stored** box.

• If you wish to remove a file, simply click on the **+** sign

• Click on the **Save File** button to record the file (and notes, if any) against this **individual**
Recording other correspondence In/Out

To record other Communication In or Out

- Go to the Individual’s details
- Click on the button on the secondary menu bar to record any communication going out
- Click on the button on the secondary menu bar to record any communication coming in
- The Other Communication In/Out box appears
- Fill in all the relevant information

  **To/ From** - Choose if the letter is being sent to the constituent or an address you have entered into the Third Party Database
  
  **Case** - Select a case if appropriate
  
  **Topic** - Select a topic to classify the document; you can create a new topic by simply typing into the relevant dropdown
  
  **Sub Topic** - Choose a sub topic to classify the document; you can create a new sub topic by simply typing into the relevant sub topic dropdown. If you are not sure if a sub topic relevant to the document has already been created click on the browse button. The Search Topics window will appear; search for the sub topic you need.

- In the Look For box type in the name of the sub topic you are searching for and then click on Search. If there are any matching topics they will be listed below next to search results
- Click on the + to select the sub topic
Recording other communication
In/Out - continued

• Next, fill in all the remaining information

  **Date** - You can select the date the communication was recorded on; the current date is selected otherwise

  **Reply Needed** - tick if a reply is needed and specify the date

  **Type** - Choose the type of communication, e.g. face to face meeting

  **Notes** - Add notes for this particular piece of correspondence

• Click on **Save Correspondence** to save the information
Generating correspondence in Cross Reference
Creating and adding standard letter text

What is a standard letter?

A standard letter in Cross Reference is the text of a letter or email that users frequently send to individuals either by email or by letter. A standard letter can be saved on the system for future use. Once saved, all users can access, send or update the letter.

Standard letters can be used in campaigns, in larger mail merges or when generating individual correspondence.

In order to add a new standard letter

- Click on the **Standard Letters** icon located on the main menu bar
- Click on the **Add New** button

**OPTIONAL:** if you wish to base a letter on a PRU standard select the department where a letter is located from the dropdown list

- Type the letter name - be aware that this name will be used as the subject line for emails using that text. This can be changed before sending
- Enter the letter text
- Click on **Update** to save the new standard
Generating a Blank, Standard or PRU Letter

What are Blank, Standard and PRU letters?
In Cross Reference there are three types of letters that can be generated directly through the application

Blank Letter
Generated by users themselves. In this case users do not use any standard letter texts saved on the database. The system creates an addressed Word document that is otherwise blank

Standard Letter
Generated by users from the existing saved standard letter texts. The list of all standard letters currently saved on a database can be found under the Standard Letters option located on the top menu bar.

PRU Letter
Letters generated by the PRU and stored on the PRU database. PRU Letters can be accessed directly through Cross Reference.
Generating a Blank, Standard or PRU Letter

To generate a Blank, Standard or PRU Letter

- Go to the individual’s details
- Select the relevant letter type from the secondary menu

Blank Letter  Standard Letter  PRU Letter

- The Create a Blank, Standard or PRU Letter box will appear
- Type or paste the letter text into the Letter Text box. In case of standard or PRU letters, select the letter from the relevant drop-down list
- Fill out all the relevant details

  To - Choose if a letter is being sent to the constituent or an address you have entered into the Third Party Database
  Case - Select a case, if appropriate
  Sub Topic - Choose a sub topic to classify the document; you can create a new sub topic by simply typing into the relevant sub topic dropdown. If you are not sure if a sub topic relevant to the document has already been created click on the browse button. The Search Topics window will appear; search for the sub topic you need.
  Date - Set the date you want on the letter
  Reply Needed - Tick if a reply is needed and specify the date
  Template - Select the Word template you want to use from the list of templates set up by your office
Generating a blank, standard or PRU email

To generate a Blank, Standard or PRU Email

• Go to the Individual’s details
• Select the relevant letter type from the secondary menu

Blank Email  Standard Email  PRU Email

• The Create a Blank, Standard or PRU Email box will appear

• Type or paste the email text into the Email Text box. In case of Standard or PRU emails, select the letter from the relevant drop-down list
• Type or paste the email subject into the Email Subject box where required

• Fill out all the relevant details

To - Choose if a letter is being sent to the constituent or an address you have entered into the Third Party Database
Case - Select a case, if appropriate
Topic - Select a topic to classify the document; you can create a new topic by simply typing into the relevant dropdown
Sub Topic - Choose a sub topic to classify the document; you can create a new sub topic by simply typing into the relevant sub topic dropdown. If you are not sure if a sub topic relevant to the document has already been created click on the browse button. The Search Topics window will appear; search for the sub topic you need.
Date - Set the date the email was generated on
Reply Needed - Tick if a reply is needed and specify the date
Generating a Blank, Standard or PRU Email - continued

**Email Account** - Select the email account you wish to send the email from

**Template** - Select email template

**Notes** - Add notes, if any

**Select Any Files To Attach** - Attach files onto your email, if any

**Highlight Any Items This Correspondence Clears** - Select any correspondence the email applies to

- If you wish to send a test email before sending the actual message, simply type in your email address into the **Test Address** box

  and press **Send Test Email**

- Once you are happy with the email click on **Send Email** button
Creating a template

What is a template?

Templates are used in Cross Reference to determine how your letters will look. You create templates using Microsoft Word. You choose the font, font size, spacing, margins and any text you wish to appear that will not be in any letter you send, for example ‘Yours sincerely’. You can also embed a signature into the template. You use merge codes (just like a Word mail merge document) to place where you would like the address, date, letter, dear and reference (if you use one) to appear.

The merge codes you use are

Address
Date
Reference
Dear
LetterBody
Managing templates

Templates can be easily managed by users themselves. Users can add, edit or delete templates from the system.

There is no limit on the number of templates that users can add to the system.

To manage templates

• Click on the **Templates** button located on the top menu bar

• Select an action to take

  **Add new/ update existing template** - update existing templates. An updated template needs to be saved with a different name and re-uploaded

  **Open existing template** - open an existing template to view in Word

  **Delete existing template** - completely delete a template from the system
Opening a new case

What is a case?

Cases help users to file all related correspondence in one place.

To create a case in an individual’s record

- Click on the New Case button on the secondary menu bar
- The New Case window will appear
- Fill in all the relevant details

**Owner** - The person responsible for the case

**Title** - The name given to the case *(NOTE: title is not a topic or sub topic)*

**Topic** - Select a topic to classify the document; you can create a new topic by simply typing into the relevant dropdown.

**Sub Topic** - Choose a sub topic to classify the document; you can create a new sub topic by simply typing into the relevant sub topic dropdown. If you are not sure if a sub topic relevant to the document has already been created click on the browse button. The Search Topics window will appear; search for the sub topic you need.

**Open Date** - Choose the date when the case was created

**Priority** - Set the importance level

**Reference 1, 2, 3** - Add any references associated with this case

**Review Date** - Set the case review date if needed

Add in any initial notes in the Case Notes box

- Click on the Save button to save the settings
Editing a case

To close or edit a case

• Go to the individual’s details

• Find the case you want and click the on the button to open the case

• The Edit / Close Case box will appear

• From here you can edit the main case details or close the case.

• To close the case just click the Close Case check box

• Once you have made any changes or opted to close the case click on the Save button

• If you have closed the case it will move from Open Cases to Closed Cases. You will still be able to view the case and any relevant correspondence

To close a case

• Go to the individual’s record

• Find the case you want to close and click on the button

• Confirm your action in the dialog box that is displayed
Editing correspondence in a case

To edit a case correspondence

• Go to the individual's details

• Locate the correspondence which you would like to edit. Non-case correspondence will be located on the individual's profile page. Correspondence for a particular case can be found in the **Cases & Topics** section

• Click on the **Edit** button

• Edit any relevant information

• Click on the **Save Correspondence** button to save the information
Third parties
What are third parties in Cross Reference?

The Third party Database allows you to add the details of people you write to on behalf of your constituents.

To add a new Third Party

- Click on the Third Party Database button located on the main menu bar
- The Third Party Management tab will appear
- Click on Add New button
- Fill in the boxes and click on Update button
Editing an existing third party

To edit or delete a third party

• Click on the **Third Party Database** button

• The **Third Party Management** tab will appear

• Click on select third party or add new dropdown and select the required record

• Change any details then click on **Update**

• To delete the address click on the **Delete** button

• A **Confirm Delete** Box will appear, click on Yes to delete the address

**WARNING** if you say yes to delete, the action cannot be reversed
What is a campaign?

The Campaigns feature in Cross Reference is used to record a lobbying campaign and to add the individuals who have contacted you in response to the campaign.
Creating a campaign

To generate a campaign click on the **Campaigns** button

- The **Campaigns** tab appears
- Click on **Add New Campaign** button located on the top menu bar
- The **Create A New Campaign** box will appear

**Title** - Give the campaign a title
**Topic** - Select a topic to classify the document; you can create a new topic by simply typing into the relevant dropdown
**Sub Topic** - Choose a sub topic to classify the document; you can create a new sub topic by simply typing into the relevant sub topic dropdown. If you are not sure if a sub topic relevant to the document has already been created click on the browse **...** button. The **Search Topics** window will appear; search for the sub topic you need.
**Template** - Select the template you wish to use
**Correspondence Type** - Select the correspondence type
**Standard Letter** - Choose the standard text to be used for the initial response (if known)
**Notes** - Add in any notes

- Click on **Add Campaign** button to save it into the database
Generating a campaign letter or email

To generate a campaign

- Click on **Reports** button located on the top menu bar
- The **Reports** tab appears
- Click on the **Report** dropdown box and choose **Campaigns** from the drop-down list

**Campaign** - Choose the campaign from the drop-down list
**Status** - Choose from show **All Correspondence**, Only those already written to or Only those not already written to
**Only After** - Filter to only show Individuals added to this campaign after the date you choose
**Only Before** - Filter to only show Individuals added to this campaign before the date you choose
**Sort Order** - Choose if you want the Individuals to appear in alphabetical order or in the order you entered them in

- Click on **Show Report**

- All those **Individuals** meeting the chosen criteria will be displayed in the right of the screen
- Under **Options** click on the drop down box select an option
  **Tag Individuals** - would place a tag (previously entered into your system) next to all those constituents in the list
Generating a campaign letter or email - continued

**Write A Standard Letter** - This creates a letter from your list of standard letters with the option of printing it out for each person

**Download To Excel** - Creates an Excel file of names and addresses

**Show on Map** - Shows the address of matching individual on a map

**Create Labels** - Produces labels from a suitable Word template

**Send a Standard Email** - This creates an email to each matching individual based on a standard letter text
Running a report

What is a report in Cross Reference?

Reports are used in Cross Reference to generate mailshots. Correspondence generated using the reports function gets automatically captured and recorded on the system under each Individual.

There are various forms of reports that can be generated through Cross Reference. However, if a user requires a custom report which includes additional data, the PRU support team can usually generate such reports on request.

To run a report

• Click on

The Reports tab appears

• Click on the Reports dropdown box choose the appropriate report from the list

• Select the report name from the dropdown list

• Click on

• Under Options chose the action you want to take, including writing a standard letter or sending a standard email
Setting up a surgery

To set up a surgery

• Click on the **Surgeries** button located on the top menu bar

• The **Surgeries** tab will be displayed

• Click on **Add A New Surgery** button

• The **New Surgery** window will appear

• Fill in all the relevant fields

  - **Date** - Choose a date for the surgery
  - **Start Time** - Choose a start time
  - **Slots** - Choose whether your surgeries are timed or untimed
  - **Number of Slots** - Choose how many
  - **Duration of each slot** - Choose how long in minutes each slot is
  - **Location** - Where this surgery will be held
  - **Notes** - Add any notes about this surgery (Optional)

• Click on **Save** to save the surgery
Assigning a surgery slot to an individual

1. Go to the Individual’s details

2. Click on Add To Surgery button

3. The New Surgery Appointment box appears

   Date - Select the appointment

   Note - Add notes, this is a required field

4. Click on the Save button. The surgery will appear in the surgery section of Contact Details & Tags
Editing a surgery

To edit a surgery

• Click on the **Surgeries** button located on the main menu bar

• The **Surgeries** tab will be displayed

• Click on **Select A Surgery** and choose the surgery you wish to edit

• The Surgery Details will appear

To edit the main surgery list

• Click on the **Edit This Surgery** button

• The **Edit Surgery** box will appear

• If no one has a surgery appointment you can change all the details, if someone has an appointment you can only change the notes or location

• When you have made your changes click on **Update**

• From this screen you can also add new slots to the surgery and edit the time of existing appointments
Actions and to do items
What are actions and to do items?

In Cross Reference there are two types of functions which, once assigned to a specific user, will alert them of an action or a task waiting to be completed.

**Actions** and **To Do Items** can be viewed on the Home screen, as well as under the profile of Individuals they were filed under.

**Action** - A task which can be assigned to a user at a time when any type of correspondence is being generated or captured through Cross Reference.

**To Do Item** - A task which can be assigned to another user not relating to a specific correspondence.
Assigning an action when storing a piece of correspondence

- Select the action type from the drop-down list
- Select the user to which the action should be assigned to
- Set the action’s due date
- Add any notes (optional)

Creating a to do item

- Click on Add To Do Item located on the secondary menu bar

- The New To Do Item box appears
  
  To Be Done By - Choose a person from the drop down list
  Case - Choose a case if appropriate
  Due Date - Set the date the item needs to be done by
  Notes - Type your message for the person set the to do item

- Click on Save To Do Item

The To Do Item will appear in the To Do Items box in the individuals record. It will also appear in the To Do items list of the person assigned the task.

Printing a to do items list

- Click on To Do Items button located on the top menu bar
- The To Do Items Tab will be displayed
- To export the lists of To Do Items just click on either the Export items set for you to do or Export items you have set for others to do buttons
- An Excel document will open listing the Items and you can then print this out, or email it.
Managing master topics and sub topics
Adding a new topic or sub topic

Whenever you are at a screen with the topic and sub topic dropdown options you can simply type in a new topic and/or sub topic as required.
Editing master topics

To edit a master topic

- Click on Topics / Contact Types and Tag Updates button
- The Topics/ Contact Types and Tag Updates tab will be displayed
- Click on
- Select Edit A Master Topic
- The Rename A Master Topic box will be displayed
  - Topic - Choose the Main Topic you wish to renam
  - New Name - Type in the new name of the Topic
- Click on Rename to complete the action

Warning! This will change all instances of the topic’s name throughout Cross Reference
Editing Sub Topics

To edit a sub topic

- Click on **Topic / Contact Type and Tag Updates** button

- The **Topic / Contact Type and Tag Updates** tab will be displayed

- Click on

- Select **Edit Sub Topic**

- The **Rename A Sub Topic** box will appear

  - **Topic** - Choose the Main Topic which has your sub topic
  - **Sub Topic** - Choose the Sub Topic you wish to rename
  - **New Name** - Type in the new name of the sub topic

- Click on the **Rename** button to complete the action

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*Warning! This will change all instances of the topic’s name throughout Cross Reference*
Management Statistics
Generating a report through Management Statistics

To generate various reports through management statistics

- Click on Statistics
- The Management Statistics tab will appear
- Click on Select a report from the drop down box
- Click on Show Results
- You will see the statistics about the report and a list of individuals (depending on the type of report selected) about who the report refers to
- You can click on View to see the particular individual and their case. It will open in a new tab.
1. **Can more than one person share a Yubikey?**

A single Yubikey can be shared between two or more users. However, it should be noted that each Cross Reference user account can only have one Yubikey associated with it.

2. **Can Cross Reference be used outside of the Parliamentary Estate?**

Yes. Cross Reference is configured to work both on and off the Parliamentary Estate.

3. **Can an office request a custom report be generated?**

Yes. Additional reports can be generated by the support team on request. Please email prusupport@parliament.uk with the requirements and data needed.

4. **Does my office have access to the web version of Cross Reference?**

Please check with support regarding access to the web version, we will happily set it up for you.

5. **How many users can share the license?**

Each MP’s office can have as many user accounts associated with one license as it is necessary. The license is per office not to per user.