IQ4 User Preferences

Table of Contents

Introduction

This document provides explanations of the User Preferences as configured in the IQ4 User Interface and can be used as a supplement when configuring Users in IQ4.

General

Scanning Enabled

Select this check box if you have a scanner attached to your workstation and will be scanning and attaching images or other files to any records. Scanning requires that ActiveX be used, so you must use Internet Explorer when scanning.

Automatically Subscribe to Discussion Topics Where I am a Participant

Selecting this check box will automatically subscribe you to a topic in which you have participated. This will generate an alert whenever there is a new thread within the topic.

Open Discussion Links in Discussion Dialog or IQ Record Page

Select Discussion Dialog in this dropdown list to open the Discussion alert dialog when clicking a Discussion Alert message. From the Discussion Alert Message, you can click a second link to open the IQ Record Page. Select IQ Record Page to open the record in which the alert was generated.

Hide These Modules

This User Preference contains a list of IQ modules configured for your office and for which you have been granted access. By default all of the modules are displayed in the IQ Big Menu or you may check the modules you would like to hide.

Contacts

List Last Name First

Click in this field and select **Yes** if you would like the name to appear in the List View with the Last Name, Prefix First Middle (Quorum, Mr. John P.). Select **No** if you would prefer the name to appear with the Prefix First Middle Last (Mr. John P. Quorum)

Default Message Status of Posted Records

Select the status you would like IQ to use as the default when posting Set Records.

Messages

Default Incoming Method

IQ automatically assigns the Incoming Method when processing Incoming emails, faxes or entering opinions. If you are manually entering incoming email, letters, post cards, etc. into IQ, then select the appropriate Incoming Method, otherwise accept the default setting of "No Default Selected".

Default Incoming Method for Service

IQ automatically creates and assigns the Incoming Method when processing incoming Service related emails from web forms or the IQ Outlook Add-In. Select "No Incoming" if you primarily create outgoing Service related Messages.

Default Outgoing Method

Select "No Default Selected" to use your office default Outgoing Method. IQ will automatically select the appropriate outgoing method based on the Contact's Preferred Method of Communication.

Default Outgoing Method for Service

Select "No Default Selected" to use your office default Outgoing Method. IQ will automatically select the appropriate outgoing method based on the Contact's Preferred Method of Communication.

Default Message Status

This field allows you to set the default Message record status for Message records that you create. The default option is **Approved (if user security permits)**. If your IQ user ID has been granted access to approve Message records, the Message record status will be Approved. If your IQ user ID has not been granted access to approve Message records, then the status of Message records you create will be On Hold. This setting does not apply to Message records that are posted from Sets.

Default Message Status for Service

This field allows you to set the default Message record status for service related Messages that you create. The default option is **Approved (if user security permits)**. If your IQ user ID has been granted access to approve Message records, the Message record status will be Approved. If your IQ user ID has not been granted access to approve Message records, then the status of Message records you create will be On Hold. This setting does not apply to Message records that are created by IMA.

Default Custom Letter Format

This field lets you set the default letter format that is used when you create a custom letter, or quick email. When you click in this field, you can choose from a list of all available letter formats. IQ will automatically updated this preference if a new approved version of the letter format has been created.

Default Envelope

This field lets you set the default envelope format that is used when you print letters individually and as part of a batch unless you select a different envelope format at print time. It is also used in conjunction with the **Print Envelope** option from the Print Menu in the List Action. IQ will automatically update this preference if a new approved version is created for the selected envelope format.

Default Letter Approval Service

Click in this field and select the person who is responsible for approving Messages that you answer in Service records. The user name will appear in the Message record when you select a Status of **Request Approval**.

Local Folder for Checkout

This field lets you specify where temporary files are written to your workstation during processes such as checking out custom letters and scanning images. If you leave this field blank, files are written to your Downloads folder.

Default Custom Letter Approver

Click in this field and select the person who is responsible for approving Messages that you answer with custom letters. The user name will appear in the Message record when you select a Status of **Request Approval**.

Default Form Letter Approver

Click in this field and select the person who is responsible for approving Messages that you answer with form letters. The user name will appear in the Message record when you select a Status of **Request Approval**.

Default Salutations for New Message

This field lets you set the default salutation that is used when you add a new Message record or post Message records in a Set. IQ automatically sets this to use the System Setting for your office. Click in the field to select another default salutation. Changes to this setting only apply to Message records that are created after this setting is changed and do not change the salutation for existing Message records.

Default Draft Printer

The default printer appears in the Printer field when you print a draft of a letter in IQ.

Default Preview Printer

The default printer appears in the Printer field when you print a preview of a letter in IQ.

Default Final Printer

The default printer appears in the Printer field when you print a final copy of a letter in IQ.

Default Copy Printer

The default printer appears in the Printer field when you print a copy of a letter in IQ.

Default Envelope Printer

The default printer appears in the Printer field when you print an envelope in IQ.

Default Label Printer

The default printer appears in the Printer field when you print labels in IQ.

Services

Default Template for New Service

Click in this field and select the template you want to use as your default when adding a new Service record by selecting the **+Default Service** in-row action. This template will also appear at the top of the Select Template dialog when adding a new Service record by selecting the **+Service** in-row action or **Add New Service** in the Actions menu.

Default Form Letter Approver

Click in this field and select the person who is responsible for approving Messages that you answer with form letters in Services. The user name will appear in the Message record when you select a Status of **Request Approval**.

Automatically Delete IQ Alert when user Acquires Ownership

This option defaults to *No*. Select *Yes* if you would like IQ to automatically delete the alert message from IQ when you acquire ownership of a Service. If you do not acquire ownership, the IQ alert message is not automatically deleted.

Close All Attached Messages When Completing Service

Select **Prompt** if you would like IQ to display the message "Do you want to complete all attached Messages when closing this Service?" if there are Message records associated with the   Service you are closing. Select **Auto Close** if you would like IQ to automatically close associated Message records without prompting. Select **Not Close** if you do not want IQ to automatically close associated Message records when you close a Service.

Show Quick and Suggested Letters for Service Messages

This option defaults to Yes. Select No if you do not want IQ to display a dialog with a list of available Service-related form letters when adding Service Messages. The dialog allows you to immediately email a letter by selecting the Email button or you can select the Add button to select a letter and go to the Message record page. Note: The dialog contains a check box which allows you to set this preference to No when you remove the check from the "Show Quick Letter Options When Adding Service Messages" check box.

Preferred Templates

Select the Service templates you would like to appear in the Select Template dialog when adding a new Service record in IQ. If you do not select any templates here, then the Select Template dialog will display all of the active templates for your office.

Library

Default Form Letter Approver

Click in this field and select the person who is responsible for approving form letters that you create. This user name will appear in the Form Letter record when you select a stat of Request Approval.

Default Form Letter Directory

Use this setting to select a default directory for storing your newly created form letters. This directory appears in the Directory field when you open a new Form Letter record, but another directory can be selected in place of the default.

Default eNewsletter Directory

You can use this field to assign a default directory for the eNewsletters you create in IQ. If you leave this blank, then you can select a directory each time you create an eNewsletter.

Default Form Letter Format

Click in this field and select the default format to be used when you add a new form letter. The Default Form Letter Format is also used when you create a Quick Email from the Messages Big Menu, or from a Service Record. IQ will automatically update this preference if a new approved version is created for the selected letter format. Likewise, if the selected default is made **Inactive**, then "No default selected" will appear in this field.

Default File Directory

Click in this field and select a default directory to appear when you add a new file in IQ. This directory appears in the Directory field in the Library File record when you add a new file.

Default File Service

Click in this field and select a default template to be used when adding a Document Service on the Document Record page. The Default template appears in bold type at the top of the Select Service Type dialog.

Events

Default Calendar

This setting automatically defaults to your calendar when your IQ user record is created. Your calendar will appear by default in the Daily, Weekly, and Monthly Views, in all Event List Results, and in any new Event record you create. Click in this field to select another default calendar that you have been granted access to.

Additional Calendars

If you schedule events for multiple calendars, you can use this preference to select additional calendars to appear by default whenever you create a new Event. IQ will automatically populate the Calendar field in the Event or Recurring Event with the Default Calendar and any additional calendars you select in this field.

Sync Status to Outlook Subject field

Select this if you would like IQ to append the Event Status to the Summary field data when an IQ Event record is synchronized with Outlook. The Status appears in the format "STATUS" followed by a colon and then the IQ Event Summary.

Copy Event Information into Alert Message Body

Check this setting if you would like the following fields, from the IQ Event record, to be copied into the Send Alert message text field when sending an Alert from an IQ Event record:

Start: 3/14/17 8:00 am EST
End: 3/15/17 5:00pm EST
Location: LMDSI 2700 Prosperity Ave. Suite 200, Fairfax VA 22031
Subject: Limited to the first 1,000 characters
Notes: Limited to the first 2,000 characters
Custom Fields:
Custom Field Label - Custom Field Value

Default Subject for Send Alert

Use this setting if you would like IQ to automatically enter a default subject whenever you send an alert from an IQ Event record.

Default Status

Click in this field and select the Status you want to appear by default when adding a new Event in IQ.

Default Start Time Zone

Click in this field and select the start time zone you want to appear by default when adding a new Event in IQ.

Default End Time Zone

Click in this field and select the end time zone you want to appear by default when adding a new Event in IQ.

Default End Time

Click in this field and select "0", "30 minutes" or "1 hour" to automatically populate the End Time field based on your entry in the Start Time field.

Default Report Statuses

This preference lets you set defaults for statuses you would like to appear on Event reports. Select **All Statuses** or choose **Selected Statuses**. You will be able to change these defaults when running reports if you choose.

Default Report Locations

This preference lets you set defaults for locations you would like to appear on Event reports. Select **All Office Locations** or choose **Selected Office Locations**. You will be able to change these defaults when running reports if you choose.

Default Report Information

This preference lets you set defaults for specific data you would like to appear on Event reports. Select each individual field you would like to appear by default by checking the boxes. You will be able to change these defaults when running reports if you choose.

Custom Field Section Heading

This setting allows you to include a section heading for any IQ Event custom fields you selected to include for Outlook Synchronization. This heading will appear in the body of the Outlook appointment above the selected custom fields.

Selected Custom Fields

This section contains a list of all the custom fields that have been created for your IQ Event module. Select the custom fields you would like IQ to include when you synchronize an Event with Outlook.

Archivist

Adobe Acrobat Printer Name

Entering the name of your local Adobe Acrobat Pro printer, such as "Adobe PDF" in this field provides the option to "Prepare for Redaction" on the Attach Record dialog for the **Attach Record** action in the **Library** section of a Service record. If you do not enter the Adobe Printer name in this field, then the **Prepare for Redaction** check box will not appear on the Attach Record dialog.