Intranet Quorum[®]

Outlook 2007, 2010 and 2013

Add-In Features

v3.1.2.9

November 28, 2016





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Introduction

Intended Audience

This document is written for Leidos Digital Solutions, Inc. (LDSI) IQ4 customers interested in the implementation of the IQ Add-In with Microsoft Outlook 2007, 2010 or 2013 as well as those who have installed the IQ Add-In.

Scope

This document provides an overview of the IQ Add-In features for v3.1.2.9. For installation assistance, please contact your Leidos Information Technology Consultant (ITC).





Overview

The IQ Outlook Add-In is a client program which must be installed on the user's desktop. The program integrates with Microsoft Outlook 2007, 2010 and 2013 and provides the user with additional Outlook functionality to send Mail message, Contact, and Calendar records to Intranet Quorum (IQ) via background web service processes. **Note:** There is no synchronization of data between the IQ Add-In and Intranet Quorum.

IQ 4.1 Rev 2 and Microsoft Office 2007, 2010 or 2013 Standard are the minimum software requirements that support this functionality.

IQ Outlook Add-In is a .NET 2.0 Windows form application which relies on components released by Microsoft after the original release of Office 2003, so the installation process must check for and properly install the necessary prerequisites. After installation is completed, the user must configure the program with the address of their IQ server and account ID.

Once installed, the program can be un-installed using the Windows Add/Remove *Programs* utility found in the Windows *Control Panel*.

Configuring Application Security

Windows-based applications built using .NET have a much more advanced security model than do applications built using older technologies. In order to provide access to local resources, the IQ Outlook Add-In application is given full trust at time of installation.

However, the Code Access Security Policy for .NET applications can be controlled manually using tools available to your Leidos Information Technology Consultant.

Configuring the IQ Outlook Add-In

After installation has been completed, Outlook must be restarted and the individual will have a new top-level menu option labeled "Intranet Quorum (IQ)." The next step is to click the "Configure IQ Access" option on that menu.

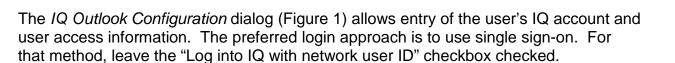


Figure 1		
🕁 IQ Outlook Configuratio	on	
IQ Login Preferences		
IQ Web Server Path ☑ Log into IQ with ne		Advanced
IQ User ID IQ Password	NETWORKID	
IQ Account	[IQ41	
Proxy Server Path		
Validate		
		OK Cancel

Note: If you are accessing the IQ server using a VPN connection from a workstation that is not connected to the network (i.e. you log into the workstation locally), click the **Advanced** button next to the **IQ Web Server Path** (Figure 1) and enter the Domain name your IQ server is located in, along with your User ID and Password in the *Network Login* dialog (Figure 2).

Figure 2

🕁 Network Log	in 🗆 🗆	23
Domain User ID	acct04	
Password	jsmith]
	ОК	.4

🕿 leidos





Figure 3

🔗 IQ Outlook Configuration		
IQ Login Preferences		
Other Options		
Category/Status when added to IQ	Blue	
Move to folder after added to IQ	<don't move=""> 🔹</don't>	Add "IQ E-mail" Folder
Convert internal Exchange ema	il addresses to SMTP address	
Reset Grid Column Order	Refresh Code Lists	
<u> </u>		OK Cancel

Other options on the Preferences tab (Figure 3) include:

- The ability to select an Outlook Category/Status flag for messages that have been added to IQ and a folder to store the Outlook messages after they have been added to IQ. Click the Add "IQ E-mail" Folder button to create a new personal folder called "IQ E-mail" if you would like to store your IQ Outlook email messages. If you do not want your Outlook messages to be moved from your Outlook Inbox to the IQ E-mail folder, then select <Don't Move>.
- The "Convert internal Exchange email addresses to SMTP address" checkbox is selected by default. This saves the email address as <u>kathy.creamer@lmco.com</u> in the IQ Contact record. If this is not checked, the email address will be populated with the Exchange email address (i.e. /O=LMCO/OU=SITE09/ CN=RECIPIENTS/ CN=RDB299573)
 Note: This only applies to Outlook emails received from internal staff (i.e. Creamer, Kathy) and not from external emails (i.e. james.smith@yahoo.com).
- The **Reset Grid Column Order** button allows you to reset the order of the columns in the IQ Add-In dialogs back to their default order. Until this button is selected, the Add-In will retain the column order you selected in the People, Mail and Service grids.
- The Refresh Code Lists button can be used to retrieve an updated list of issue codes for the selected IQ account. This is only needed for users who use a single IQ account and do not log out and back into Outlook (during which time new issue codes could have been added in IQ). Note: Switching between IQ accounts (in the Add-In Configuration) will automatically refresh the code lists.





Adding Outlook E-Mail to IQ

You can add an Outlook E-Mail message to IQ by highlighting the email in your Inbox or Sent Items folder and then selecting the **Add Email to IQ** option on the Intranet Quorum (IQ) menu and **Add Email to IQ** on the submenu (Figure 4). You can also select the **Add to IQ** button located on the **Add-Ins** tab within an Outlook E-Mail message (Figure 5).

Figure 4

Intranet Quorum (IQ) Help	Conferencing Adobe PDF	🕞 📓 " 15 🔹 🗢 = Outlook 2007 version of the IQ Outlook Add-in - Message (HTML) 💷 📼 🗙
Add <u>E</u> mail to IQ 🔶	Add Email to IQ	Message Add-Ins
Add <u>N</u> ame to IQ	Add Email(s) to IQ Workflow 🕨	Add to IQ
Add as IQ Event	Add Email(s) to IQ Event	Custom Toolbars
Launch IQ		From: Haring, David Sent: Mon 10/29/2007 9:37 AM
<u>C</u> onfigure IQ Access	Subject	To: Hart, Chris Cc: dl-LMIT-DSI, QA; Hocketstaller, Walter; Choe, Joon
Updates		Subject: Outlook 2007 version of the IQ Outlook Add-in
<u>A</u> bout IQ		I've posted an Outlook 2007 version of the IQ Outlook Add-in for internal use and testing. The install program can be found on the dsi_data2 server in the following location:



The **Add to IQ** feature will present you with additional options when adding Outlook records into your IQ People database to ensure quality data entry. These include, but are not limited to, the following:

- The address type will automatically default to Business if a Title or Organization is entered.
- The address checker results are displayed to the right of the Zip Code field.
- The Country field is automatically populated with United States in the newly created Contact record in IQ.

Additionally, Outlook E-Mail messages may be attached as pending IQ Message records within either People or Service records.



Creating an IQ Contact record from an Outlook E-Mail Message

Select the **Add to IQ** button located on the Add-Ins tab within an Outlook mail message. If a matching Contact record is found in your IQ database, the *IQ Contact and Message/Service Entry* dialog appears with a list of matching records (Figure 6).

efix	First		Midd	e Last		Suffix			Switch	n to Forwar	der
	➡ Tim			Poole				•			
Q Conta	ct Records	Address &	Phone	Numbers	Service	Message	Uploads	Messa	age Body		
	Name		H/B	Line 1		City		State	ZIP	Title	Org.
•	Mr. Tim Poo	e	в	2700 Pro:	sperity A	Fairfax		VA	22031		LMDSI
•		m									

If no matches are found, the text "No matching names found in IQ" appears on the IQ Contact records tab (Figure 7). **Note:** You can edit the name fields and click the **Search Again** button to perform another search.





Figure 7

refix	First		Middle	Last		Suffix		Γ	Switch	to Forwarder	7	
	▼ Tom			Kiely				•				
Q Contact	Records	Address &	Phone	Numbers	Service	Message	Uploads	Messa	ge Body			
No match	ing contac	ts found in	IQ.									
									Г	etach Sear	rch Again	
										Jeal	ch Again	

If the Outlook email has been forwarded, the **Switch to Forwarder** button will appear in the top right corner of the *IQ Contact and Message/Service Entry* dialog. Click this button to display a drop-down list of names and/or email addresses for the email message. (Figure 8)

IQ Con	itact and Me	ssage/Sen	vice En	try							
Prefix	First Wayne		Middl	e Last Rogan		Suffix		•		ch to Forwarder logan, Wayne	
IQ Conta	act Records	Address &	Phone	Numbers	Service	Message	Uploads	Messa		reamer, Kathy Chris Coleman	
	Name		H/B	Line 1		City		State	ZIP	Itle	Org.
•	Mr. Wayne Mayne Mayne Rog		B H	5660 Ro	undtree	Woodbrid	lge	VA	22193	. PC Wizard	PC Haven
•		III									
										Detach Sea	rch Again





Click the **Address & Phone Numbers** tab to enter a mailing address, phone number and affiliation codes as needed (Figure 9). Click the **Add Contact to IQ** button to create the new IQ Contact record.

Prefix Fin	st Middle L	ast	Suffix	Switch to Forwarder
▼ Ton	1	Kiely	-	•
IQ Contact Record	s Address & Phone Nu	umbers Service	Message Uploads	Message Body
Title				Type Business -
Organization	LMDSI			Type Duancia .
Line 1	2700 Prosperity Aven	nue		
Line 2				
City	Fairfax	State V	A - ZIP 22031-433	39 NO ERROR
Phone Numbers and Email Addres		Number/E-	mail Address	
	Email	contr.Tom.Kie	ely@mail.house.gov	
		•		
		1		
Affiliation	s CHA Council on He	union havin Affaire		
Amiliation	CHIEF Indian Chief		^	
	CHINESE Chinese CMA Country Music			
	CP Computer Progr	rammer		
	CPAU Cerebral Pal	sy Associations	United 🔻	Add Contact to IQ

The text "Created IQ Contact – ID #" appears in the upper right hand corner (Figure 10). Click this link to open the new IQ Contact record.

refix	First	Mi	dle Last		Suffix			Switch	to Forward	der
	▼ Tom		Kieły	r			- <u>c</u>	reated IQ	Contact - ID ;	#8400136
Q Cont	act Records	Address & Pho	ne Numb	ers Service	Message	Uploads	Messa	age Body		
	Name	F	/B Line	1	City		State	ZIP	Title	Org.
•	Tom Kiely	В	2700	Prosperity A	Fairfax		VA	22031		LMDSI
< □		III								
۲ 📃		111							Deteck	Court Amin
4				_					Detach	Search Again)



Note: If you select the **Add to IQ** button from within an Outlook EMail message that was previously linked to a Contact record, the text "Previously matched to ID #" appears at the top of the *IQ Contact and Message/Service Entry* dialog as pictured in Figure 11. Click this link or the name link in the Name column to open the IQ Contact record.

refix	First	Midd	e Last		Suffix				
	Tom		Kiely			E E	reviously	matched to ID	#8400136
Q Conta	act Records	Address & Phone	Numbers	Service	Message Upload	ls Mess	age Body		
	Name	H/B	Line 1		City	State	ZIP	Title	Org.
•	Tom Kiely	В	2700 Pros	sperity A	Fairfax	VA	22031		LMDSI
•		111							
۲		111						Detach	Search Again

Figure 11

Creating an IQ Message record from an Outlook E-Mail Message

Message records are associated with Contact records in IQ. See the above section, "Creating an IQ Contact record from an Outlook E-Mail message" on how to create a new or locate an existing Contact record. If you are creating an IQ Message record for a previously matched Outlook mail message, you must first select the record on the **IQ Contact records** tab by clicking the arrow next to the matching record. Then select the **Message** tab on the *IQ Contact and Message/Service Entry* dialog (Figure 12).





Figure 12

refix	First		Midd	e Last	Sufix				
ls.	Jenny			Manner	\mathbf{V}	- <u>M</u>	latched to	Contact with ID	#8069174
Q Conta	act Records	Address &	Phone	Numbers Service	Message Uploads	Messa	age Body		
	Name		H/B	Line 1	City	State	ZIP	Title	Org.
	Ms. Jenny N	lanner	н						
Þ	Ms. Jenny N	<u>lanner</u>	В	Address Line 1	Canton	MS	52462	President	Code Corp60
	Jenny Mann	er	н	2700 Prosperity A	Woodbridge	VA	22193		
4		111							ł

Select an Issue Code from the **Issues** list. If the selected issue code has an associated user, that user will automatically appear in the **Assigned To** field, otherwise the Assigned To field will contain your name. Click the **Assign as IQ Message** button to create the Message record (Figure 13).



First	Middle Last	Suffix			
Jenny	Manner		✓ Matche	d to Contact with ID	<u>#8069174</u>
cords Address	& Phone Numbers Serv	ice Message U	ploads Message Bo	dy	
4/16/2015	In Method Email	•	Priority 0 - None	•	
AA Affirmative AA.C Affirmative AA.N Affirmative AA.P Affirmative AA1 Affirmative AA1.C Affirmati	Action e Action - Con re Action - Neutral e Action - Pro e Action ve Action - Con	nan 🔻			•
			0	4	Ĵ
Det	ach Add Message to	Existing Service	Link to Existing IC	Message Assign	n as IQ Message
	Jenny cords Address 4/16/2015 AP – Abortion – AA – Affirmative AA – Affirmative	Jenny Manner Kords Address & Phone Numbers Serv 4/16/2015 In Method Email A.P - Abortion - Pro A.A Affirmative Action A.A Affirmative Action - Con A.A Affirmative Action - Neutral A.A. P - Affirmative Action - Neutral A.A Affirmative Action - Neutral A.A Affirmative Action - Con A.I Affirmative Action - Con Lisa Wyland Hartman – Lisa Wyland Hartr	Jenny Manner Manner Message U cords Address & Phone Numbers Service Message U 4/16/2015 In Method Email I A.P Abortion - Pro A.A Affirmative Action - Con A.A Affirmative Action - Neutral A.A. P Affirmative Action - Neutral A.A. P Affirmative Action - Pro A.A.I Affirmative Action - Con A.I.C Affirmative Action - Con Lisa Wyland Hartman - Lisa Wyland Hartman	Jenny Manner Matche cords Address & Phone Numbers Service Message Uploads Message Bo 4/16/2015 In Method Email Priority 0 - None A.P - Abortion - Pro A.A - Affirmative Action - Con A.A Affirmative Action - Neutral A.A.P - Affirmative Action - Pro AA1 - Affirmative Action - Pro AA1 - Affirmative Action - Con AA1 - Affirmative Action - Con Isa Wyland Hartman - Lisa Wyland Hartman	Jenny Marched to Contact with ID cords Address & Phone Numbers Service Message Uploads Message Body 4/16/2015 In Method Email Priority O-None A AP - Abortion - Pro AA - Affimative Action - Con AA - Affimative Action - Neutral AA P - Affimative Action - Pro AA - Affimative Action - Pro AA - Affimative Action - Pro AA - Affimative Action - Con A1 - Affimative Action - Con Lisa Wyland Hartman - Lisa Wyland Hartman

The text "IQ Message #" appears at the bottom of the **Message** tab on the *IQ Contact and Message/Service Entry* dialog. Click this link to open the IQ Message record (Figure 14).





Figure 14

🕁 IQ Contact and Message/Service Entry	_ 🗆 X
Prefix First Middle Last Suffix Image: Second	<u>#8069174</u>
IQ Contact Records Address & Phone Numbers Service Message Uploads Message Body	
Date In 4/16/2015 VIn Method Email V Priority 0 · None V	
Issues A.P Abortion - Pro AA - Altimative Action Con AA - Altimative Action - Con AA - Altimative Action - Neutral AA - Altimative Action - Neutral AA - Altimative Action AA - Altimative Action - Neutral AA - Altimative Action AA - Altimative Action - Neutral AA - Altimative Action AA - Altimative Action Pro AA - Altimative Action Con Assigned To Lisa Wyland Hartman Vould like a response as soon as possible. Vould like a response as soon as possible. IQ Message #6874410 Detach Add Message to Existing Service Link to Existing IQ Message Assign	T as IQ Message
	Close

The IQ Message record will contain the selected Issue Code(s), Assigned To and Comments entered in the Message tab in the *IQ Contact and Message/Service Entry* dialog. In addition, the Outgoing email Subject will automatically be updated with RE: <Incoming Outlook Email Subject >

									Ø	Shortcuts 🗸	Kathy 🗸
Home	Contacts 🗸	Messages 🗸	Outreach 🗸	Services 🗸	Library 🗸	Events 🗸	LegiStats 🗸				
Messages	» Message									n :	ID# 6874410
Hold M	-	Ms. Jenny	Manner								Action 🛇
Gene	eral L	og (7)									
				Message					< Detail	Other A	ctivity
Outgoir	ng: E	mail				, Stat	US: On Hold	¥	Save as Template		💋 Edit
From:	P	IQ41 Default From Ema	ail" <iq41@dsiiq4ushr< td=""><td>.dsi.ess.lmco.com></td><td></td><td>•</td><td></td><td></td><td>Date In: 4/16/2015</td><td></td><td></td></iq41@dsiiq4ushr<>	.dsi.ess.lmco.com>		•			Date In: 4/16/2015		
To:	je	enny.manner@lmco.co	n *			Cc/Bcc			Assigned To: Lisa W Priority: None	-	an
Subject	R	E: +/- Number in date	fields						Salutation: Dear Ms. Hyperlink to Mapques		
Attachr	nents:	D							Message Custom Field	i Label Only:	
Issues:		AA - Affirmative Actio	n		0	+			Message Comment		
Form L	etter:	lo Letter selected				. 0			Would like a response as	soon as possibl	е.



Creating an IQ Service Record from an Outlook E-Mail Message

Service records are usually associated with Contact records in IQ. See the above section, "Creating an IQ Contact record from an Outlook E-Mail message" on how to create a new or locate an existing Contact record. If you are creating an IQ Service record for a previously matched Outlook message, you must first select the record on the **IQ Contact Records** tab by clicking the arrow next to the matching record. Then select the **Service** tab on the *IQ Contact and Message/Service Entry* dialog (Figure 15).

Figure	15
0	

🕁 IQ Cor	ntact and Message/Ser	vice Entry				_ 🗆 🗙
Prefix	First	Middle Last	· · · ·			orwarder ct with ID #8392248
IQ Cont	act Records Address &	Phone Numbers	Service Message	Uploads Messa	age Body	1
	Name	H/B Line 1	City	State	ZIP Title	Org.
Þ	Tracy Braddon	B 2700 Pro	sperity A Fairfax	VA	22031	LMDSI
4						<u>,</u>
					Detach	Search Again
< >						Close

The **Service** tab contains four radio options: "Create New Service", "Add to Person's Service" and "Add to My Service" and "Add to Service #". The default option is "Create New Service", which allows you to select a Service Template from the list and click the **Create New IQ Service** button to create a new Service for the selected Contact record with the Outlook Email message attached to the Service (Figure 16).





Figure 16

🛷 IQ Contact and Message/Serv	vice Entry	
Tracy	Middle Last Suffix Braddon Phone Numbers Service Message Uplo	Switch to Forwarder Matched to Contact with ID #8392248 Dads Message Body
Service Options: Create Ne	ew Service C Add to Person's Service	C Add to My Service C Add to Service #
Select Service Template to Create New Service	IHA) Todd Exec Sec 004 MGMT Correspondence 004 SCS Correspondence 2012 Flag Request (Pay gov) 2012 Grants 2013 Academy Nominations 6.23 CSC 6.23 TR AAA Academy Nominations Academy Nominations	
		Detach
< >		Close

Note: If you are using IQ3.8b Rev 25 (or higher) and you have selected "Preferred Templates" in your IQ User Preferences, a checkbox will appear to allow you to display your preferred templates. (Figure 17)

IQ Contact and Me	essage/Service Entry		_ 🗆 X
Prefix First		Suffix	Switch to Forwarder Switch to Forwarder Matched to Contact with ID #8392248
IQ Contact Records	Address & Phone Numbers	Service Message Upl	oads Message Body
Service Options: 6 Create New Service Select Service To to Create New S	emplate Academy Nom	inations	C Add to My Service C Add to Service #
			Create New IQ Service
	1		
			Detach
< >			Close





The text "IQ Service Record #" appears at the bottom of the **Service** tab on the *IQ Contact and Message/Service Entry* dialog (Figure 18). Click this link to open the IQ Service record.

Figure 18

Braddon none Numbers Service Mess / Service C Add to Person (H1A) Todd Exec Sec 004 MGMT Correspondence 004 SCS Correspondence 2012 Grants 2013 Academy Nominations 8:23 CSC		Switch to Forwarder Matched to Contact with ID #8392248 Message Body Add to My Service C Add to Service Preferred Templates	
V Service C Add to Person (H1A) Todd Exec Sec 004 MGMT Correspondence 004 SCS Correspondence 2012 Flag Request (Pay.gov) 2012 Grants 2013 Academy Nominations 8.23 CSC		Add to My Service C Add to Service	#
(H1A) Todd Exec Sec 004 MGMT Correspondence 004 SCS Correspondence 2012 Flag Request (Pay.gov) 2012 Grants 2013 Academy Nominations 6.23 CSC	's Service C		#
004 MGMT Correspondence 004 SCS Correspondence 2012 Flag Request (Pay.gov) 2012 Grants 2013 Academy Nominations 6.23 CSC	<u> </u>	Preferred Templates	
004 MGMT Correspondence 004 SCS Correspondence 2012 Flag Request (Pay.gov) 2012 Grants 2013 Academy Nominations 6.23 CSC		Preferred Templates	
6.23 TR AAAA AAAA_Original			
Academy Nominations New		Create New IQ Service	
Alerts Assignment-test	•	Create New IQ Service With Message	
		Detach	
2	cademy Nominations cademy Nominations New derts	weademy Nominations weademy Nominations New Jerts	Locademy Nominations New Just Locademy Nominations New Just Lets Locademy Nominations New Just Lets Locademy Nominations New Just Lets Create New IQ Service With Message

Creating a new IQ Service and Message record from an Outlook E-Mail Message

You can create both a new Service and Message record by selecting the **Create New IQ Service With Letter button** on the **Service** tab on the *IQ Contact and Message/Service Entry* dialog.

🕁 IQ Contact and Message/S	ervice Entry		_ 🗆 ×
Prefix First Mr. ✓ David	Middle Last	Suffix	Switch to Forwarder Matched to Contact with ID #246507
IQ Contact Records Address	& Phone Numbers Servio	1 - 1 - 1	Add to My Service C Add to Service #
Create New Service			
Select Service Template to Create New Service	2012 Grants 2013 Academy Nomin- 6.23 CSC 6.23 TR AAAA AAAA, Original Academy Nominations Alerts Assignment-test ATF Applicant Tracker Auto Read Auto Read Auto Read Board Applicant	New r2	Preferred Templates Create New IQ Service Create New IQ Service With Message
			Detach
$\langle \rangle$			Close





When you select this button, the *Create Service Message* dialog (Figure 20) appears so you can select the Message record information and whether or not you want to upload the outlook email message to the *IQ Service Record* or *IQ Message Record*. Click the **Add Message to New Service** button to create the new IQ Service and Message records.

Figure 20

🛃 Create Service Message	×
	New Service #667390
Date In 🚺/17/2015 💌 In Method Email 💌	Priority 0 - None
Issues OST Tessa Grubb OST.C OBudget, Spending and Taxes - Con OST.N OBudget, Spending and Taxes - Neutral OST.P OBudget, Spending and Taxes - Pro 194406 Angel Smith User Assignment for Code	×
Assigned To	
Comments	A
Upload Message and Attachments To 🛛 C IQ Service Record 📀	IQ Message Record
Add Message to New Service	Cancel Message Creation

The text "IQ Service Record #" appears at the bottom of the **Service** tab on the *IQ Contact and Message/Service Entry* dialog (Figure 21). Click this link to open the IQ Service record.

🕁 IQ Contact and Message/Se	rvice Entry			_ 🗆 X
Prefix First Mr. David	Middle Last	Suffix	Switch to Forwarder Matched to Contact with ID #246507	:
IQ Contact Records Address 8	Phone Numbers Service	Message Uploads N	1essage Body	1
Service Options: C Create N Create New Service	New Service C Add to P	erson's Service O /	Add to My Service C Add to Servic	e#
Select Service Template to Create New Service	2012 Grants 2013 Academy Nomination 6.23 CSC 6.23 TR AAAA Original Academy Nominations Academy Nominations	~	Preferred Templates ireate New IQ Service ireate New IQ Service With Message	
IQ Service Record #667392			Detac	h
$\langle \rangle$				Close



Adding an Outlook E-Mail Message to an Existing IQ Service

In addition to creating a new Service, you can update an existing Service record by selecting the "Add to Person's Service", "Add to My Service" or "Add to Service #" option on the Service tab of the *IQ Contact and Message/Service Entry* dialog. When you select the "Add to Person's Service" or "Add to My Service" option, a list of existing Services appears as pictured in Figure 22.

Figure 22

refix	First		Last S	Suffix 🛫	Switch to F	orwarder act with ID #83595	<u>24</u>
Q Co	intact Records	Address & Phone N	umbers Service M	essage Uploads N	1essage Body		
Servi	ce Options: (Create New Servic	ce 💿 Add to Pers	on's Service 🛛 🖓	Add to My Service	O Add to Servic	ce #
	d to Existing Se elect Service:	rvice for Person —				2	
	Service ID	Owner	Opened	Primary Person	Template	Comments	D
►	667034	Kathy Creamer	2/17/2015 12:45	Isbell, Cassandra	АААА		
•					Link to Selected I	0 Service for Cont	▶ act
•					Link to Selected I	Q Service for Cont	

You can resort the Service records by clicking a column heading and change the order of the columns by clicking and dragging the column to the left or right. (The sort order and column arrangement will remain until you select the **Reset Grid Column Order** button in the IQ Outlook Configuration dialog.) Once you have located the Service, highlight it by clicking the arrow. Then select the **Link to Selected IQ Service for Contact** button (Figure 22) and click **OK** to confirm that you want to link the Outlook email to the existing IQ Service record.



Figure 23



When you select the "Add to Service #" radio option, you can enter the Service ID# and select the **Link to Entered IQ Service** button (Figure 23). Then click **Yes** to confirm you would like to link the outlook message to the IQ Service.

Ama	(0) i E i			
😔 IQ Contact and Messag				<u> </u>
Prefix First	Middle Last	Suffix	Switch to Forwarder	
👻 Cassandra	Isbell		Matched to Contact with ID #8359524	
IQ Contact Records Add	Iress & Phone Numbers Ser	vice Message Uploa	ds Message Body	
Service Options: C Cr Add to an Existing Servic		ld to Person's Service	C Add to My Service Add to Service #]
Enter Service ID #	667034			
			Link to Entered IQ Service	
			Detach	
$\langle \rangle$			Clo	se





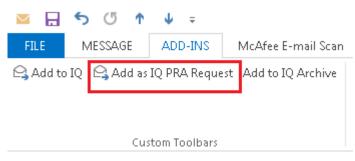
The text "IQ Service Record #" appears at the bottom of the **Service** tab on the *IQ Contact and Message/Service Entry* dialog (Figure 24). Click this link to open the IQ Service record.

Figure 24

🕗 IQ Contact and Message/Se	rvice Entry			_ 🗆 X
Prefix First Cassandra	Middle Last	Suffix	Switch to F	orwarder act with ID #8359524
IQ Contact Records Address	& Phone Numbers Serv	vice Message Uploads	Message Body	1
Service Options: C Create I	New Service 🛛 🔿 Ado	d to Person's Service	C Add to My Service	C Add to Service #
Create New Service				
Select Service Template to Create New Service	(H1A) Todd Exec Ser 004 MGMT Correspon 004 SCS Correspond 2012 Flag Request (F 2012 Grants 2013 Academy Nomi 6.23 CSC 6.23 TR AAAA	ndence ence Pay.gov)	Preferred Templa	Ites
	AAAA_Original Academy Nomination Academy Nomination Alerts		Create New IQ Servic	
	Assignment-test	•	Create New IQ Servic	e With Message
IQ Service Record #667034				Detach
$\langle \rangle$				Close

Creating an IQ Service from an Outlook E-Mail Message using Default Service Template

If have selected a default Service Template in your IQ User Preferences, you can quickly create an IQ Service Record from within an Outlook E-Mail message by selecting the **Add as IQ <Default Service Template>** button where <Default Service Template> is the name of your selected default template. For example, if your default Service template is "PRA Request", then the button "Add as IQ PRA Request" will appear inside of your Outlook E-Mail messages. (Figure 25)

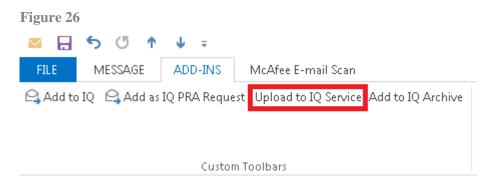






Uploading an Outlook Reply E-Mail Message to an Existing IQ Service

If you link an e-mail message (in your Outlook Inbox) to an IQ Service record and then send a reply email back to the sender, you can upload your reply e-mail as an attachment to the original IQ Service record. Open your reply e-mail in the **Sent Items** folder and then select the **Upload to IQ Service** button on the Add-Ins tab (Figure 26). Then click the **Yes** button to confirm you want to upload the reply to IQ Service record #nnnnn (where nnnnnn is the IQ Service Record number).



Adding multiple Outlook E-Mail Messages to a New IQ Service

If there are multiple emails in your Outlook Inbox (or Sent folder) you would like to attach to the same IQ Service, highlight each email by holding down the CTRL key while you mouse click each message. Then select **Add Email to IQ** from the main Internet Quorum (IQ) menu and then **Add Email(s) to IQ Service** from the submenu and **Add to New IQ Service** from the second submenu (Figure 27).

Figure 27

0			
oz 📰 🕤 🗧			Inbox - kathy.creamer@Imco.com - Outlook
FILE HOME SEND /	RECEIVE FOLDER VIEW	ADD-INS McAfee E-mail Scan	
Intranet Quorum (IQ) 🕶			
Add <u>E</u> mail to IQ →	Add Email to IQ		
Add Co <u>n</u> tact to IQ	Add Email(s) to IQ Service 🔸	Add to New IQ Service	
Add as IQ Event	Add Email(s) to IQ Event 🔹 🕨	Add to My Pending IQ Service	
Launch IQ	* All Unread	Add to IQ Service By ID	
<u>C</u> onfigure IQ Access	! 公 🗅 🖉 FROM	SUBJECT	-
<u>U</u> pdates About IQ	Can Isbell, Cas No, this is		s to be string fields but are now drop-downs. Like an orga
	C Isbell, Cas Hello All-		ator Cantwell's office, Hunter Matson, to review a reject
A kathy.creamer@lmco.com	🕞 Poole, Tim	RE: EXTERNAL: F)	N: IQ issue
▷ Inbox 46	Thank you	u Jon. I'll leave this up to Kathy and Nanc	y to understand a little bit more and what will need to b

The *Add Email(s) to IQ Service* dialog appears. Select the Service template you want to add the selected Outlook emails to. **Note:** If you would like to create a separate IQ Service record for each of the selected emails, select the "Create separate IQ Service records for each of the selected emails" checkbox. Click the **Save** button. (Figure 28)





If one or more of the selected Outlook messages have been previously matched to an IQ Service record, "Skip emails previously uploaded to services" will be checked (Figure 28).

Figure 28

ATF	ignment-test 7 Applicant Tracker 2	-	
	ecords for each of the selected emails	8	
Skip emails previously upload 1 selected email bas alreadu	led to services been matched with 1 IQ workflow		

Click **Yes** to confirm you want to link the selected Outlook emails to a new IQ Service (Figure 29). A status bar appears while the emails are being attached to the new IQ Service. The dialog closes when the process is completed.

	Service Template ate New Service	(H1A) Todd Exec Sec 004 MGMT Correspondence 004 SCS Correspondence 2012 Flag Request (Pay.gov) 2012 Grants	Preferred Templates
	IQ Outlook Add	-in	×
	Please confirm service?	n that you would like to link the selected email(s) to a new IQ
🗆 Crea		Yes	No



Adding multiple Outlook E-Mail Messages to a Pending IQ Service

If there are multiple emails in your Outlook Inbox (or Sent folder) you would like to attach to one of your existing pending IQ Services, highlight the emails by holding down the CTRL key while you mouse click each message. Then select **Add Email to IQ** from the main Internet Quorum (IQ) menu and then **Add Email(s) to IQ Service** from the submenu and **Add to My Pending IQ Service** from the second submenu (Figure 30).

Figure 30					
o 📑 5 🗸					Inbox - kathy.creamer@Imco.com - Outlook
FILE HOME SEND /	RECEIVE FOLI	DER VIEW	ADD-INS	McAfee E-mail Scan	
Intranet Quorum (IQ) 🔻					
Add <u>E</u> mail to IQ 🛛 🕨	Add Email to I	2			
Add Co <u>n</u> tact to IQ	Add Email(s) to	o IQ Service 🔸	Add to N	ew IQ Service	
Add as IQ Event	Add Email(s) to	o IQ Event 🔹 🕨	Add to M	ly Pending IQ Service	
Launch IQ	All	Unread	Add to IQ) Service By ID	Search Current M
<u>C</u> onfigure IQ Access	![章]]	ៀ FROM		SUBJECT 🔺	
Updates	la ⇒ Si	ibject: TR to Skip	the DIscussion	"Landing" Page (Contact :	193475) [Intranet Quorum IMA00321680]: 7 item(s)
<u>A</u> bout IQ		Manner, Jo Then how		RE: TR to Skip th display discussion in reco	e DIscussion "Landing" Page (Contact 193475) (Intranet Quorum IMA00321680) rd"?
▲ kathy.creamer@lmco.com		Lewis, Skip What I'm			e Discussion "Landing" Page (Contact 193475) [Intranet Quorum IMA00321680) perlink in an Alert E-Mail. Maybe "Open Discussion Link in"?
▷ Inbox 46		Rogan, W	ayne	RE: TR to Skip th	e DIscussion "Landing" Page (Contact 193475) (Intranet Quorum IMA00321680)
Drafts [2]		I also pref	er the second o	ne over the first one!	
Sent Items		Lewis, Skip			e DIscussion "Landing" Page (Contact 193475) (Intranet Quorum IMA00321680)
Deleted Items 37					ing it a simple "Yes/No", with "No" being the default.
Junk E-mail		Manner, Jo If it were :			e Discussion "Landing" Page (Contact 193475) (Intranet Quorum IMA00321680) Discussion in with options for Record or Dialog. I know a dropdown for two opt
Conversation History Conversation History					
▷ IQ		Lewis, Skip They're bo			e DIscussion "Landing" Page (Contact 193475) [Intranet Quorum IMA00321680) th. Take a vote and tell me the one y'all like best. Thanks!
Outbox	6	Skip Lewis		TR to Skip the DI	scussion "Landing" Page (Contact 193475) (Intranet Quorum IMA00321680)
quarantine		I'll be get	ting started on t	this soon and intend to st	art with a user Preference so it will only impact those that turn it on. Since there's

Highlight the IQ Service in the *Add Email(s) to IQ Service* dialog that you want to attach the selected emails to and click the **Save** button. **Note:** Previously uploaded emails are automatically skipped if they were matched to another IQ Service. (Figure 31)

Service ID	Opened \	Primary Person	Template	Comments	Due	Priorit	1
667394	4/18/2015 7:05	Isbell, Cassandra	Assignment-test			9	_
667392	4/17/2015 4:28	Johnston, David	Academy Nomina			9	
667390	4/17/2015 4:23	Johnston, David	Academy Nomina			9	
667388	4/17/2015 4:11	Braddon, Tracy	Academy Nomina			9	
667374	4/9/2015 8:10 PM	Creamer	004 MGMT Corre		4/30/2015 8:10	9	
667366	4/9/2015 7:48 PM	Creamer, Mary	PRA Request		4/19/2015	9	
667358	4/9/2015 11:13		Document Produ		7/8/2015 11:13		
667356	4/9/2015 11:10	Creamer, Brian	PRA Request		4/19/2015	9	-





Click **Yes** to confirm you want to link the selected Outlook emails to the existing IQ Service. A status bar appears while the emails are being attached to the IQ Service. The dialog closes when the process is completed.



Adding multiple Outlook E-Mail Messages to an Existing IQ Service by ID

If there are multiple emails in your Outlook Inbox (or Sent folder) you would like to attach to an existing open or closed Service, highlight the emails by holding down the CTRL key while you mouse click each message. Then select **Add Email to IQ** from the main Internet Quorum (IQ) menu and then **Add Email(s) to IQ Service** from the submenu and **Add to Existing IQ Service By ID** from the second submenu. (Figure 32)

Figure 32			Inbox - kathy.creamer@Imco.com - Outlook
	/ RECEIVE FOLDER VIEW	ADD-INS McAfee E-mail Scan	Indox - kaury, creatier with colorin - Ouddok
Intranet Quorum (IQ) 🕶			
Add <u>E</u> mail to IQ	Add Email to IQ		
Add Co <u>n</u> tact to IQ	Add Email(s) to IQ Service 🔸	Add to New IQ Service	
Add as IQ Event	Add Email(s) to IQ Event 🔹 🕨	Add to My Pending IQ Service	
<u>L</u> aunch IQ	All Unread	Add to IQ Service By ID	Search Curre
<u>C</u> onfigure IQ Access	! ☆ 🗅 🔘 FROM	SUBJECT 📥	
<u>U</u> pdates	Subject: TR#19496	53 for New Service with Safari (Contact 194	963) (Intranet Quorum IMA00325844): 2 item(s)
<u>A</u> bout IQ	Isbell, Ca: Kathy-	ssandra RE: TR#194963 fo	or New Service with Safari (Contact 194963) [Intranet Quorum IMA00325844)
▲ kathy.creamer@lmco.com	C Isbell, Ca: Kathy- Th		or New Service with Safari (Contact 194963) [Intranet Quorum IMA00325844) office-wide. So we will need every staffer to clear his/her cache. Could you o

Enter the Service ID in the *Add Email(s) to IQ Service* dialog and click the **Save** button (Figure 33). **Note:** Previously uploaded emails are automatically skipped if they were matched to another IQ Service.

Figure 33

4	Add Email(s) to IQ Service	×
	2 email record(s) selected for uploading to IQ	
	Enter Service ID # 671357	
	Skip emails previously uploaded to services	
	SaveCancel	///

Click **Yes** to confirm you want to link the selected Outlook emails to the existing IQ Service. A status bar appears while the emails are being attached to the IQ Service. The dialog closes when the process is completed.

Adding one or more Outlook E-Mail Messages to a New IQ Event

If there is one or more emails in your Outlook Inbox (or Sent folder) you would like to attach to a new IQ Event, highlight each email by holding down the CTRL key while you mouse click each message. Then select **Add Email to IQ** from the main Internet Quorum (IQ) menu and then **Add Email(s) to IQ Event** from the submenu and **Add to New IQ Event** from the second submenu. (Figure 34)

Figure 34			
💽 📰 🏷 🗧			Inbox - kathy.creamer@Imco.com - Outlook
FILE HOME SEND	/ RECEIVE FOLDER VIEW	ADD-INS McAfee E-mail Se	can
Intranet Quorum (IQ) 🔻			
Add <u>E</u> mail to IQ	Add Email to IQ		
Add Co <u>n</u> tact to IQ	Add Email(s) to IQ Service 🔸		
. Add as IQ Event	Add Email(s) to IQ Event 🔹 🕨	Add to New IQ Event	
<u>L</u> aunch IQ	* All Unread	Add to Existing IQ Event	
<u>C</u> onfigure IQ Access	! ☆ 🗅 🕘 FROM	SUBJECT	
<u>U</u> pdates About IQ	Rogan, W Kathy, Iji		INT ON DSILQFOUR12 NT ON DSILQFOUR12. The release that ran was labeled as 4.1a.
Appartic	🔺 Date: Wednesday		
▲ kathy.creamer@lmco.com	0 11	(Lockheed Martin) EXTERNAL: hris. I will open a TR. Tom Kiely LMD	RE: Survey results view in IQ4 SI IQ Escalation Team
▷ Inbox 45	📿 Coleman,	Chris RE: IQ4.1 R	ev 2.3 and new QNG account

Enter information in the **Summary** field of the *Add Email(s) to IQ Event* dialog and click the **Save** button. (Figure 35)

Add IQ Eve Calendar	nt	
IMA Unassig John Smith John Thomp: Karen Miller		Status Private Event
Kathy Cream Date	er 4/18/2015 💌	Major Event
Start Time		Zone Eastern
Summary	Meet and Greet with Tom Kiley	
Notes		×
Description		
Topics	M&G Meet & Greet MEDIA - PRINT Print media MEDIA - NADIO Radio MEDIA - TV Broadcast media METC Mechelle's Event Topic Code	
Office	LMDSI	•
Address 1	2700 Prosperity Avenue	
Addess 2		
City	Fairfax State VA 💌 Z	IP 22031



Click **Yes** to confirm you want to link the selected Outlook emails to the existing IQ Service (Figure 36). A status bar appears while the emails are being attached to the IQ Service. The dialog closes when the process is completed.

\dd IQ Eve	nt
Calendar	
MA Unassig ohn Smith ohn Thomp: (aren Miller	son, III
(athy Cream	
Date	4/18/2015 💌
Start Time	🔽 7:57 AM 🕂 End Time 🔲 7:57 AM 🛟 Time Zone Eastern 💌
Summary	Meet and Greet with Tom Kiley
Notes	
Description	IQ Outlook Add-in
Topics	M8G Me MEDIA - F Please confirm that you would like to link the selected email(s) to new IQ event MEDIA - F #5017082? MEDIA - F #5017082? MEDIA - N MEDIA - T
Office	LMDSI Yes No
Address 1	2700 Pros
Addess 2	

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Adding one or more Outlook E-Mail Messages to an Existing IQ Event

If there is one or more emails in your Outlook Inbox (or Sent folder) you would like to attach to an existing IQ Event, highlight each email by holding down the CTRL key while you mouse click each message. Then select **Add Email to IQ** from the main Internet Quorum (IQ) menu and then **Add Email(s) to IQ Event** from the submenu and **Add to Existing IQ Event** from the second submenu. (Figure 37)

Figure 37			
oz 📰 🕤 =			Inbox - kathy.creamer@Imco.com - Outlook
FILE HOME SEND	/ RECEIVE FOLDER VIEW	ADD-INS	McAfee E-mail Scan
Intranet Quorum (IQ) -			
Add <u>E</u> mail to IQ	Add Email to IQ		
Add Co <u>n</u> tact to IQ	Add Email(s) to IQ Service 🕨		
Add as IQ Event	Add Email(s) to IQ Event 🔹 🕨	Add to N	New IQ Event
Launch IQ	All Unread	Add to E	Existing IQ Event
Configure IQ Access	!☆ 🗅 🖉 FROM		SUBJECT
<u>U</u> pdates	Poole, Tim I think thi		RE: Need customer feedback by 4/17/15 < on the Senate side. They have so many records it might be overwhelming but this could help eliminate due
<u>A</u> bout IQ	Hughes, Je Kathy, Mo		RE: Need customer feedback by 4/17/15

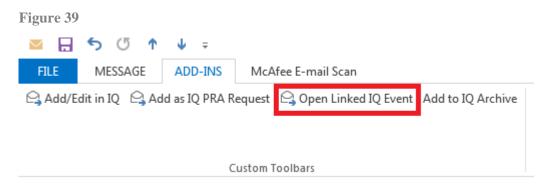
IQ displays a list of existing IQ events for the current date. Use the date fields to select another date and then highlight the IQ Event you want to attach the selected Outlook messages to. (Figure 38)

Μ	londay , Mar	ch 16,2015		, March	16, 2015 🔍 🗸	2	
	Event Date	Starts At	Ends At	Time Zone	Summary	Notes	Description
	3/16/2015	8:00 AM	8:30 AM	ET	Breakfast Meeting		
	3/16/2015	10:00 AM	11:00 AM	ET	Meet and Greet		
	3/16/2015	12:00 PM	1:00 PM	ET	Lunch		
	3/16/2015	2:00 PM	3:00 PM	ET	Staff Meeting		
		IQ Outlook Please co #5017012	nfirm that you woul	ld like to link	the selected email(s)		
		Please co	nfirm that you woul	ld like to link	the selected email(s) Yes		



Click **Yes** to confirm you want to link the selected Outlook emails to the existing IQ Event (Figure 38). A status bar appears while the emails are being attached to the IQ Event. The dialog closes when the process is completed.

Note: Once an Outlook E-Mail message has been linked to an IQ Event, you can access the IQ Event record from within the Outlook E-Mail by selecting the **Open Linked IQ Event** button on the **Add-Ins** tab (Figure 39).





Adding an Outlook E-Mail Message to an IQ Archivist Folder

If your office has purchased the IQ Archivist module, the **Add to IQ Archive** button (Figure 40) will appear inside your Outlook E-Mail messages (if you have access rights to the Archivist module in IQ).

FILE MESSAGE ADD-INS McAfee E-mail Scan	
♀ Add to IQ ♀ Add as IQ Document Production Add to IQ Archive	:
Custom Toolbars	

When you select this button, the Add-In will display a list of available File Plan folders for your IQ database in the *Add to Archive Confirmation* dialog (Figure 41). Select the folder name and then click the **Upload** button (Figure 41). The **Add to IQ Archive** button will gray out once the Outlook E-Mail message has been uploaded.

Add to Archive Confirmation	×
Select directory and click 'Upload' to add message and attachments to IQ Archivist?	
Academy Nominations \Army\testing "double quotes"	
Academy Nominations \Navy	
Case Process	
Case Process \Immediate	
EOCY	
EOFY	
EOPA	
EOPA2	
FOIA 2011	
Inter-Agency	E
···· IQ4 Root Folder	
MC's Root Folder	
MC's Root Folder\Test1	
Outlook 2010	
···· WayneR	-
Upload Cancel	





Adding an Outlook Contact to IQ

Highlight the contact name and select **Add Contact to IQ** in the main Internet Quorum (IQ) menu (Figure 42).

Figure 42		
💁 📰 🍤 🕫		Contacts
FILE HOME SEND /	RECEIVE FOLDER VIEW ADD-INS McAfee E-mail Scan	
Intranet Quorum (IQ) 🕶		
Add <u>E</u> mail to IQ ▶		
Add Co <u>n</u> tact to IQ		
Add as <u>I</u> Q Event		
Launch IQ	Search Contacts (Ctrl+E)	Q
Configure IQ Access	123	
<u>U</u> pdates	a Lewis, Skip	
<u>A</u> bout IQ	b	
Connect to a social network	c Lutz, Liza M.	

The *IQ Contact and Message/Service Entry* dialog appears with a list of matching records. If no matches were found, the text "No matching names found in IQ" appears on the **IQ Contact records** tab (Figure 43).

Æ 1	Q Contact a	nd Mes	sage/Sen	vice Ent	ry									Х
Р	refix	First		Middle	Last		Suffo							
	•	Skip			Lewis				•					
K	Q Contact Re	cords	Address &	Phone I	Numbers	Service	Messag	•						
	No matching	contact	s found in	IQ.										
										Deta	h Co	arch Ag	nin	
										Detai	38	arch Ag	am	
												_		
4													Close	





Click the **Address & Phone Numbers** tab and enter address and phone numbers to be included in the IQ Contact record. Click the **Add Name to IQ** button (Figure 44).

efix	First	Mi	iddle La	st	Suffix				
•	Skip		Le	wis		•			
Contact Rec	cords A	ddress & Ph	none Nur	bers Service	Message				
т	itle So	oftware Dev	Analyst	ör St		Γ	Туре	Busines	ss v
Organiza	tion IS	&GS-Civil				L	Type	Dusinos	
Lin	e 1 27	100 Prosperi	ty Avenu	в					
Lin	e 2								
C	City Fa	irfax		State V	′A ▼ ZIP	22031-4339	NO ER	ROR	
Phone Numb nd Email Add		уре		Number/E-	mail Address	3			
	E	mail	•	skip.lewis@lr	nco.com				
	B	lusiness Pho	one 🔻	703 /208-508	81				
	C	ell Phone	•	410 /218-26	15				
			•						
Affiliat	AS AT AT	ST&M Am T Animal 1 TAA Air Tr UDIENCE	erican So Famer ransport / Audienc	ety Public Adm ciety Testing & Association of A e in eNewslette the United Sta	Materials merica rr Wizard	•			Add Contact to IQ

The IQ Contact records tab opens with the text "Created IQ Contact – ID#" (Figure 45). **Note:** You can click this link or the name link in the Name column on the **IQ Contact Records** tab to open the IQ Contact record.

Prefix	First	Midd	e Last	Suffix				
	- Skip		Lewis		- C	reated IQ	Contact - ID #84001	38
IQ Cont	act Records Add	dress & Phone	Numbers Service	Message			<u>v</u>	
	Name	H/B	Line 1	City	State	ZIP	Title	Org.
•	Skip Lewis	В	2700 Prosperity A	Fairfax	VA	22031	Software Dev An	IS&GS-Civ
•		III						
1							Detach Search	Again





Adding an Outlook Appointment to an IQ Event

You can use the **Add Appointment to IQ** button located on the Add-Ins tab (Figure 46) to add an Outlook Appointment to your default IQ Calendar or another calendar you have access to.

५ ५ 🔶 🕹	Ŧ				Setup IMA Test emails for Rev 3 - Appointment
APPOINTMENT	INSERT	FORMAT TEXT	REVIEW	ADD-INS	
pointment to IQ					
m Toolbars					
Setup IMA Test em	ails for Rev 3				
Mon 4/13/2015		10:00 AM	•	All day event	
)	APPOINTMENT cointment to IQ n Toolbars Setup IMA Test ema	APPOINTMENT INSERT	APPOINTMENT INSERT FORMAT TEXT pointment to IQ m Toolbars Setup IMA Test emails for Rev 3	APPOINTMENT INSERT FORMAT TEXT REVIEW in Toolbars Setup IMA Test emails for Rev 3	APPOINTMENT INSERT FORMAT TEXT REVIEW ADD-INS pointment to IQ m Toolbars Setup IMA Test emails for Rev 3

The *IQ Event Entry* dialog appears with the contents of the Outlook appointment automatically added to the **Start Time**, **End Time**, **Summary**, **Notes** and **Address Line 1** fields. **Note:** The IQ Event status will default to *Approved* if you do not select a status here. Click the **Add Event to IQ** button to create the new IQ Event. (Figure 47)

🕁 IQ Event Entry	
Event	
Calendar	Status
IMA Unassigr John Smith John Thomps Karen Miller	on, III
Kathy Creame	er 📉 🔽 Major Event
Date	4/13/2015 👻
Start Time	🔽 10:00 AM 🚔 End Time 🔽 10:30 AM 🚖 🏾 Time Zone Eastern 💌
Summary	Setup IMA Test emails for Rev 3
Notes	۸ ٣
Description	
Topics	123456789123456789 testnumberofcharsincodeid 12345678912345678912 testagain AAAA - four As ABCDEFGHIJKLMNOPQRST - ABCs twice
Office	•
Address 1	
Addess 2	
City	State ZIP
	Add Service Remove Link to IQ Event Add Event to IQ
	Close





The text "IQ Event Record #" appears at the bottom of the IQ Event Entry dialog (Figure 48). Click this link to open the IQ Event Record.

iguit 40	
投 IQ Event Entry	
Event	
Calendar	
IMA Unassign John Smith John Thomps Karen Miller	on, III Private Event
Kathy Creame	
Start Time	
	V 10:00 AM → End Time V 10:30 AM → Time Zone Eastern V
Summary	Setup IMA Test emails for Rev 3
Notes	
Description	
Topics	123456789123456789 testnumberofcharsincodeid 12345678912345678912 testagain AAAA four As ABCDEFGHIJKLMNOPQRST ABCs twice
Office	
Address 1	
Addess 2	
City	State ZIP
IQ Event Recor	d #5017092 Add Service Remove Link to IQ Event Add Event to IQ
	Close

Figure 49



Note: If the Outlook Appointment contains attached files, IQ will prompt you with a list of the attachments and ask you if you would like to upload the attachments to the IQ event record (Figure 49).

IQ Event Entry		
Calendar		0.1
IMA Unassign John Smith John Thomps Karen Miller Kathy Creame	on, III	Status Private Event Major Event
Date	4/16/2015 👻	
Start Time	📝 10:00 AM 🖨 End Time 📝 10:30 AM 🚔	Time Zone Eastern 💌
Summary	Update Outlook Add-In Documentation	۸ ٣
Notes		*
IQ	Outlook Add-in	x
	The Appointment has 1 attachments. Do you w the IQ event record? updateOfficeLocation error.png (2,23	
Offi		
Address		Yes No
Addess		
City	State	ZIP
IQ Event Recor	d #5017094 Add Service Remove	Add Event to IQ
		Close





Adding an Outlook Appointment to a New IQ Service

In order to add an Outlook Appointment to an IQ Service, you must first create the IQ Event record by following the steps in the previous section. Once the IQ Event is created, you can select the **Add Service** button on the *IQ Event Entry* dialog (Figure 50).

Figure 50

Calendar	Status
IMA Unassign John Smith John Thomps Karen Miller Kathy Creame	on, III
Date	4/ 9/2015 👻
Start Time	I 1:00 PM → End Time 2:00 PM → Time Zone Easter
Summary	PQA Team Meeting
Notes	Had to recreate meeting to include online link below for Inclusion Information. Note the 1pm start time today!
Description	
Topics	123456789123456789 - testnumberofcharsincodeid 12345678912345678912 - testagain AAAA - four As ABCDEFGHIJKLMNOPQRST - ABCs twice
Office	· · · · · · · · · · · · · · · · · · ·
Address 1	PGI-1: 1-866-381-8626 Participant 22
Addess 2	
	State ZIP -

Then select the Service template in the Add Service to IQ Event dialog and click the **Save** button.

Add Service to IQ event IQ Event #5017096		
Select Service Template to Create New Service	Contract Setup Council Accounts Payable Request Create Full Event Test Create Quick Event Test CRS 2.0 - JULY 2014 CHANGES CRS Case ERS Event DC 0TA Emergency Housing DC 0TA Emergency Housing DC 0TA Intake Democratic Caucus Meeting Decument Production DDJ Citizen Mail DDJ Citizen Mail DDJ Citizen Mail	Preferred Templates
		Save Cancel





Click **Yes** to confirm you want to create a new IQ Service record that is attached to the existing IQ Event record. (Figure 51)

Figure 51

🕁 IQ Event Entry				
Event				
Calendar IMA Unassigned User John Smith John Thompson III	Status			
🕁 Add Service to IQ event	×			
IQ Event #5017096				
to Create New Service Contract	Review GSA FAS AAS			
IQ Outlook Add-in	×			
Please confirm that you would like to add an IQ service to your IQ event?				
	Yes No			
	Save Cancel			
City	State ZIP			
IQ Event Record #5017096	Add Service Remove Link to IQ Event Add Event to IQ			
< >	Close			

A message appears with the Service ID# after it is created. Click **OK** to close the message dialog and select the **Close** button to close the *IQ Event Entry* dialog.



Keeping the Add-In in Synch with IQ Versions

To assist with the task of keeping the client add-in installs in synch with IQ revisions, the *About IQ* dialog found on the Outlook Intranet Quorum (IQ) menu contains both a version number for the currently-installed add-in and the version of IQ that the add-in is configured to communicate with (Figure 52).

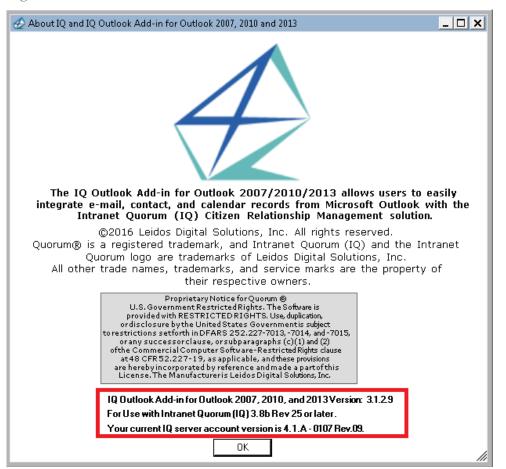


Figure 52

Existing Outlook Options for Maintaining Add-In Support

Your ITC can work with you to remove the IQ Outlook Add-In without un-installing the program if desired for a period of time. Additionally, troubleshooting of successful startup of the IQ Outlook Add-In can be done by accessing the *About Microsoft Office Outlook* dialog within the Outlook Help menu.

For More Information

Please contact your Leidos Information Technology Consultant to discuss this feature.