Intranet Quorum®

Outlook 2007, 2010 and 2013

Add-In Features

v3.1.2.9

November 28, 2016

Intranet Quorum | leidos

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Table of Contents

Introduction 1
Intended Audience 1
Scope 1
Overview 2
Configuring Application Security 2
Configuring the IQ Outlook Add-In 2
Adding Outlook E-Mail to IQ 5
Creating an IQ Contact record from an Outlook E-Mail Message 6
Creating an IQ Message record from an Outlook E-Mail Message 9
Creating an IQ Service Record from an Outlook E-Mail Message 12
Creating a new IQ Service and Message record from an Outlook E-Mail Message 14
Adding an Outlook E-Mail Message to an Existing IQ Service 16
Creating an IQ Service from an Outlook E-Mail Message using Default Service Template 18
Uploading an Outlook Reply E-Mail Message to an Existing IQ Service 19
Adding multiple Outlook E-Mail Messages to a New IQ Service 19
Adding multiple Outlook E-Mail Messages to a Pending IQ Service 21
Adding multiple Outlook E-Mail Messages to an Existing IQ Service by ID 23
Adding one or more Outlook E-Mail Messages to a New IQ Event 24
Adding one or more Outlook E-Mail Messages to an Existing IQ Event 26
Adding an Outlook E-Mail Message to an IQ Archivist Folder 28
Adding an Outlook Contact to IQ 29
Adding an Outlook Appointment to an IQ Event 31
Keeping the Add-In in Synch with IQ Versions 36
Existing Outlook Options for Maintaining Add-In Support 36
For More Information 36

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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).

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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.

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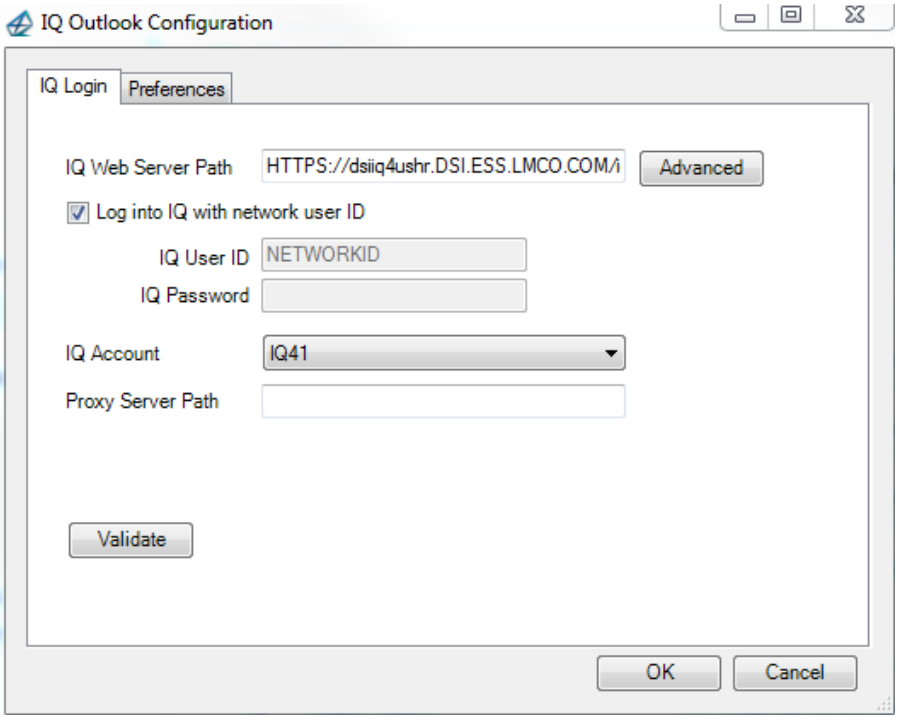
The *IQ Outlook Configuration* dialog (Figure 1) allows entry of the user's IQ account and user access information. The preferred login approach is to use single sign-on. For that method, leave the "Log into IQ with network user ID" checkbox checked.

Figure 1



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

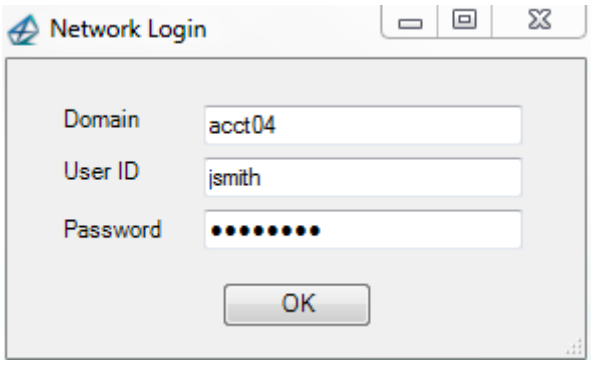


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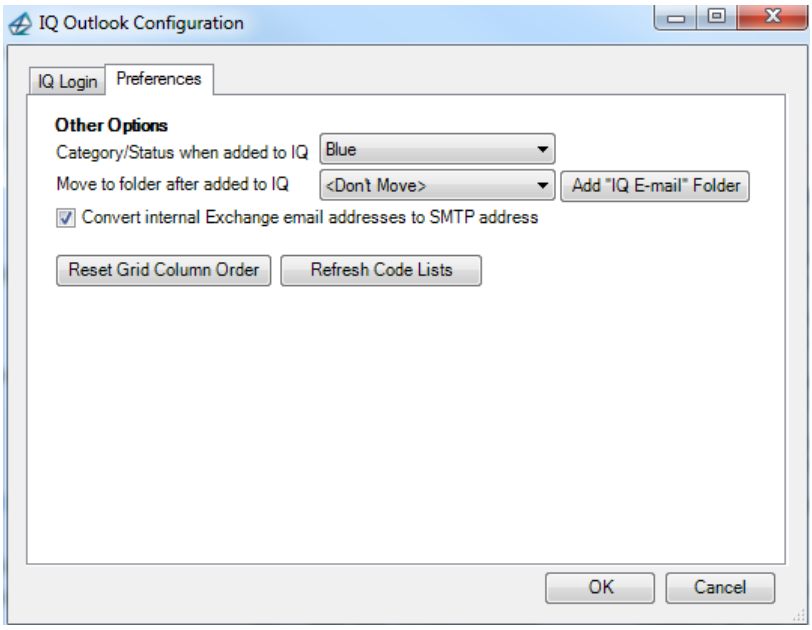
Figure 3



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 kathy.creamer@lmco.com 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.

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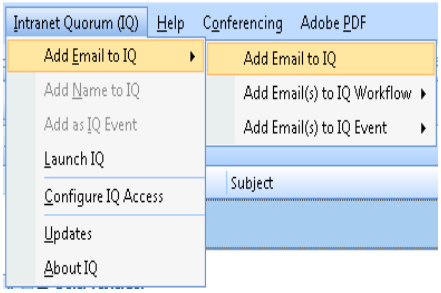
Adding Outlook E-Mail to IQ

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



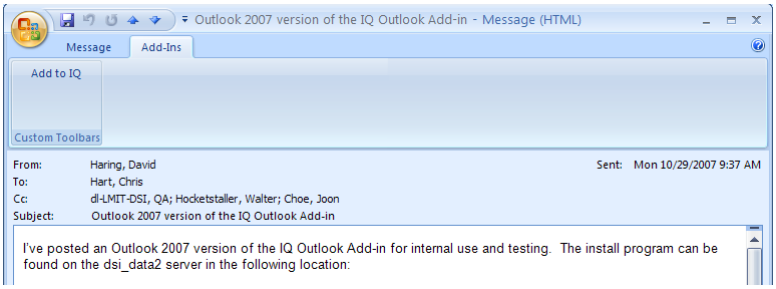


Figure 5

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.

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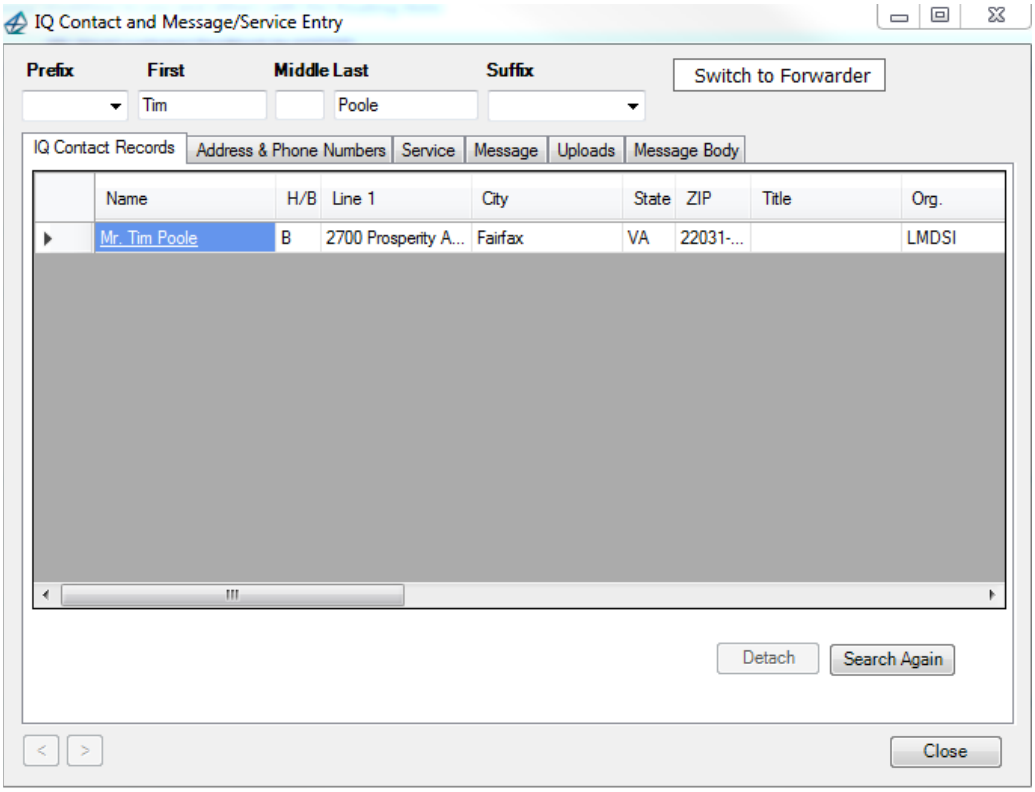
Creating an IQ Contact record from an Outlook E-Mail Message

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).

Figure 6



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.

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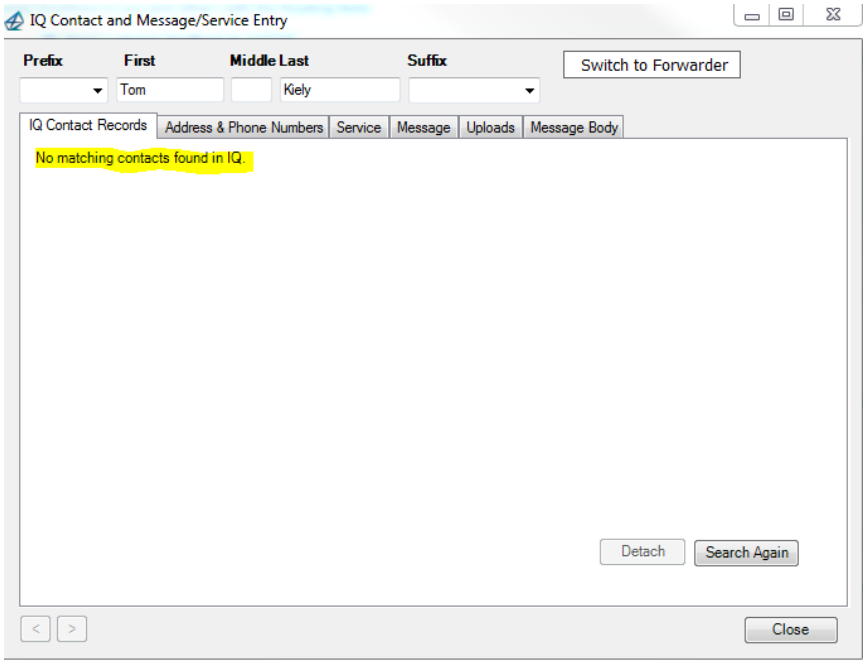
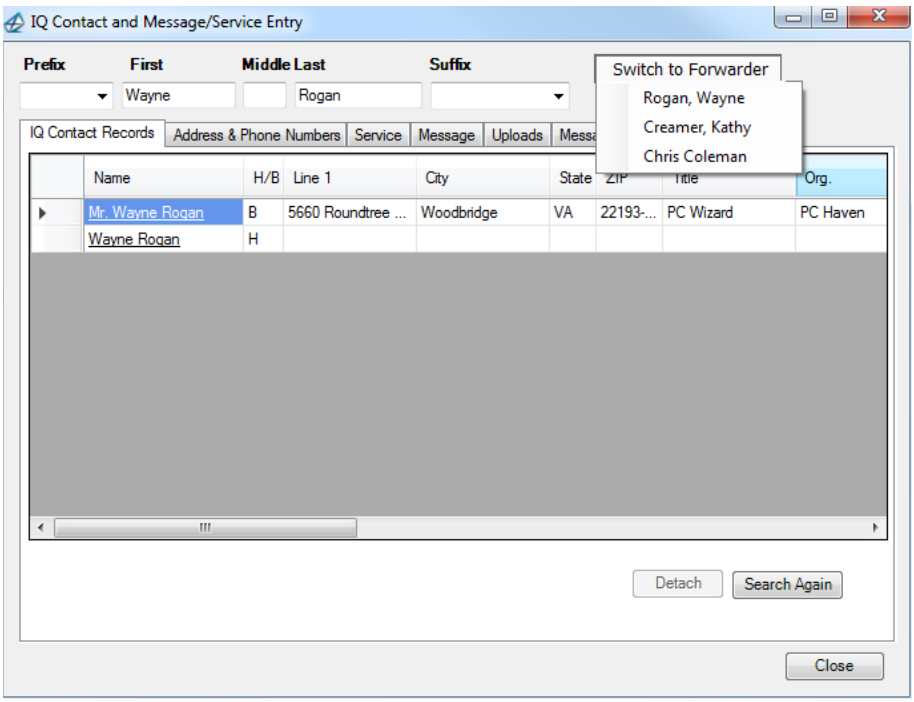
Figure 7



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)

Figure 8



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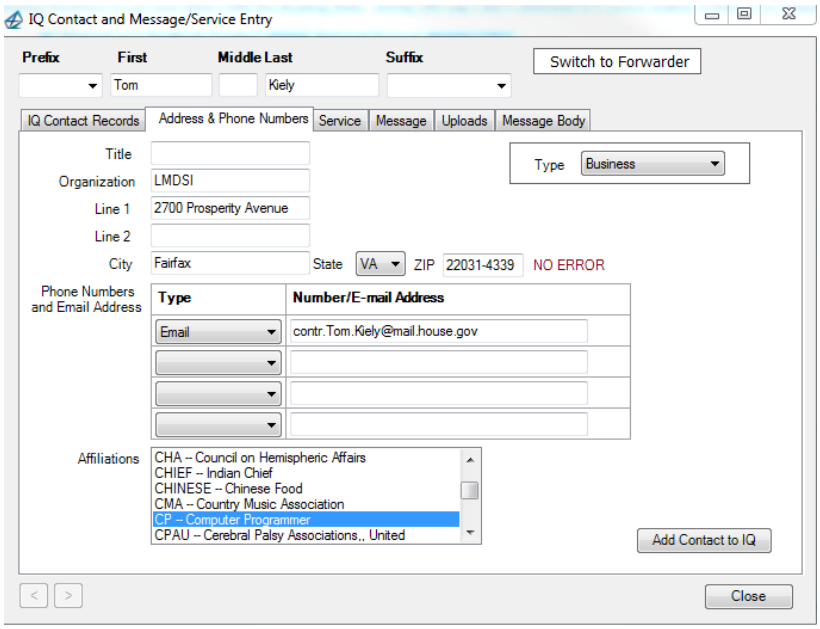
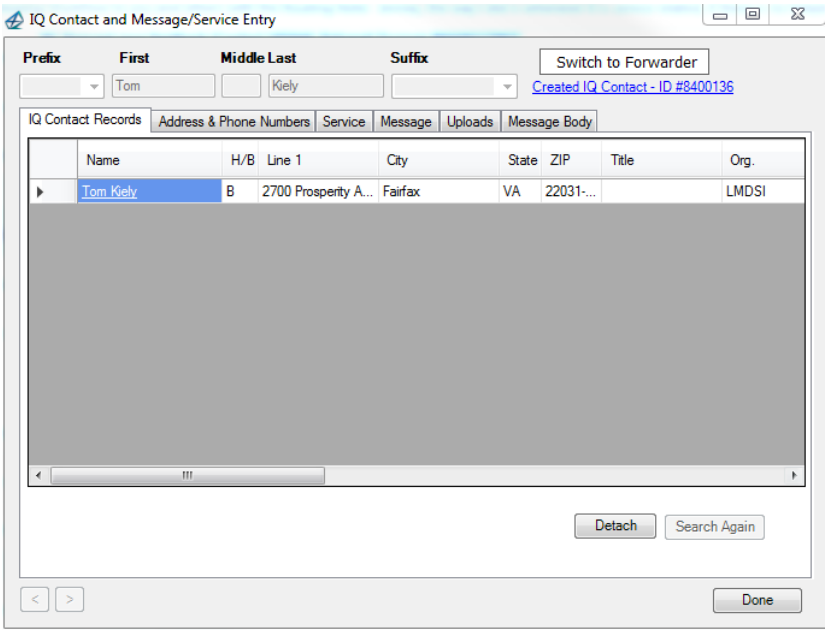
Click the **Address & Phone Numbers** tab to enter a mailing address, phone number and affiliation codes as needed (Figure 9). Click the **Add Contact to IQ** button to create the new IQ Contact record.

Figure 9



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.

Figure 10



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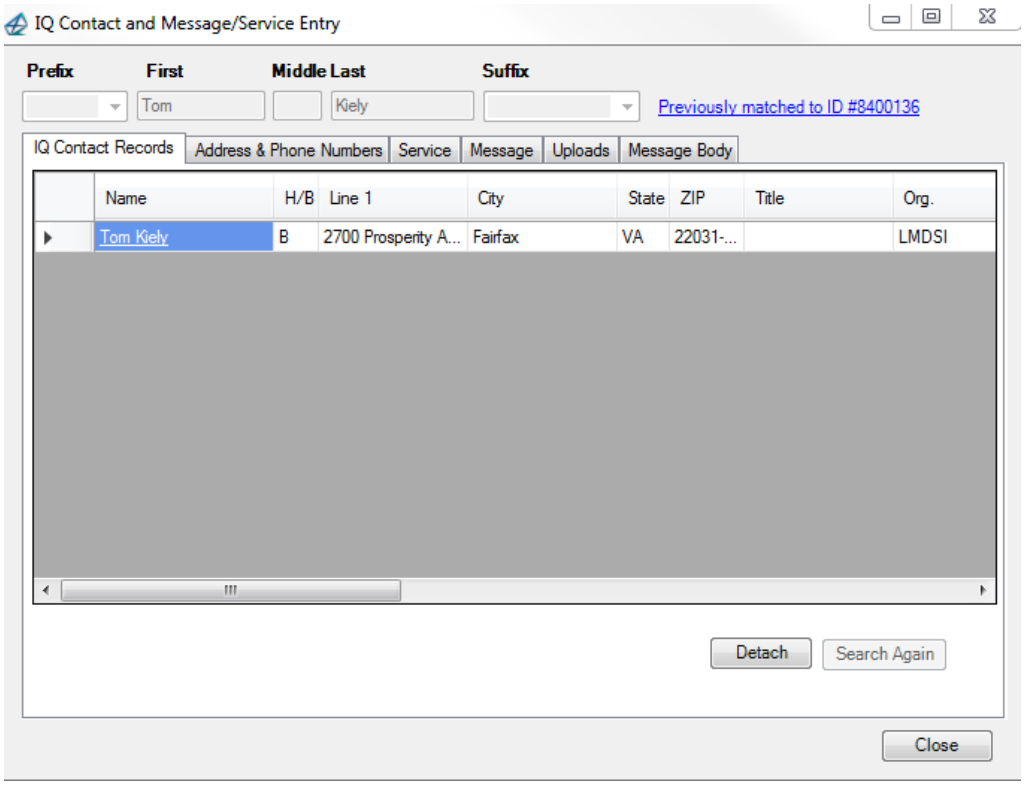
Note: If you select the **Add to IQ** button from within an Outlook EMail message that was previously linked to a Contact record, the text “Previously matched to ID #” appears at the top of the *IQ Contact and Message/Service Entry* dialog as pictured in Figure 11. Click this link or the name link in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

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).

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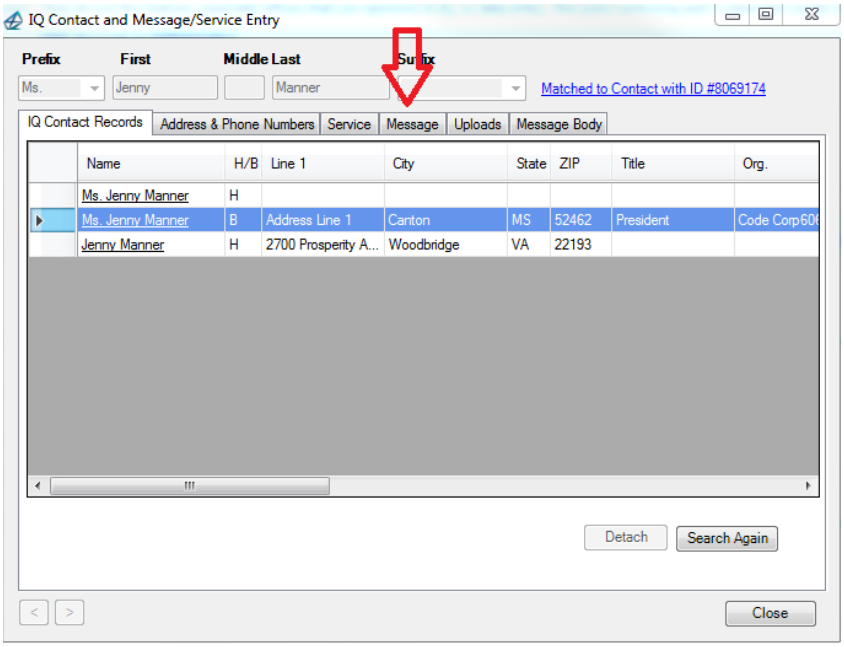
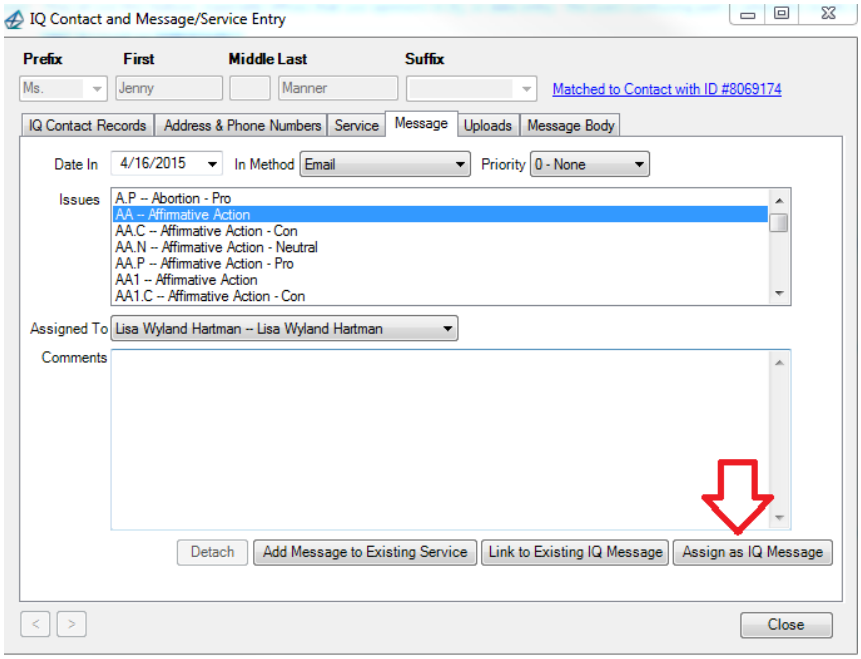
Figure 12



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).

Figure 13



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).

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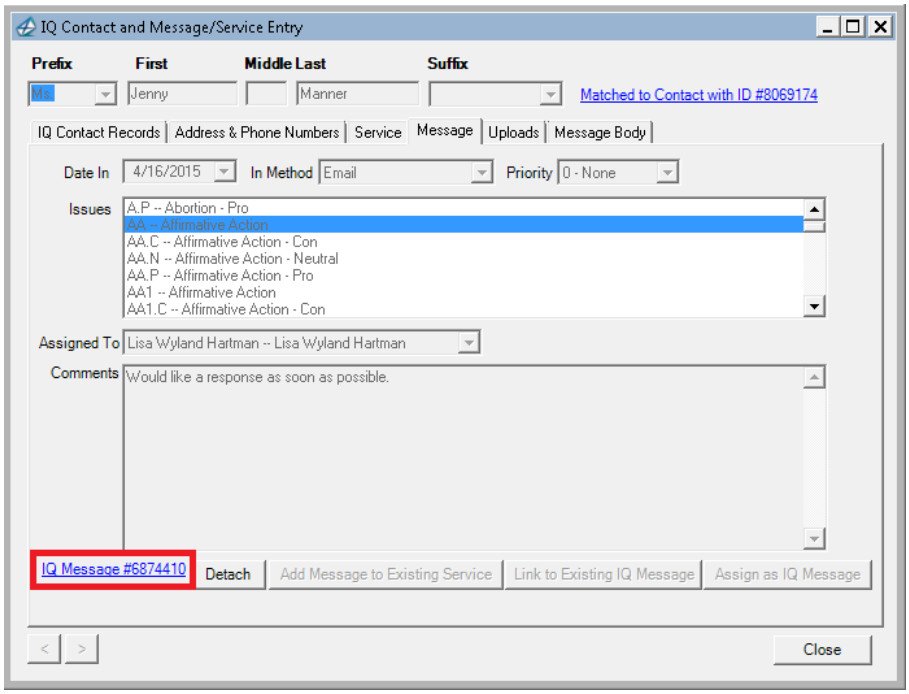
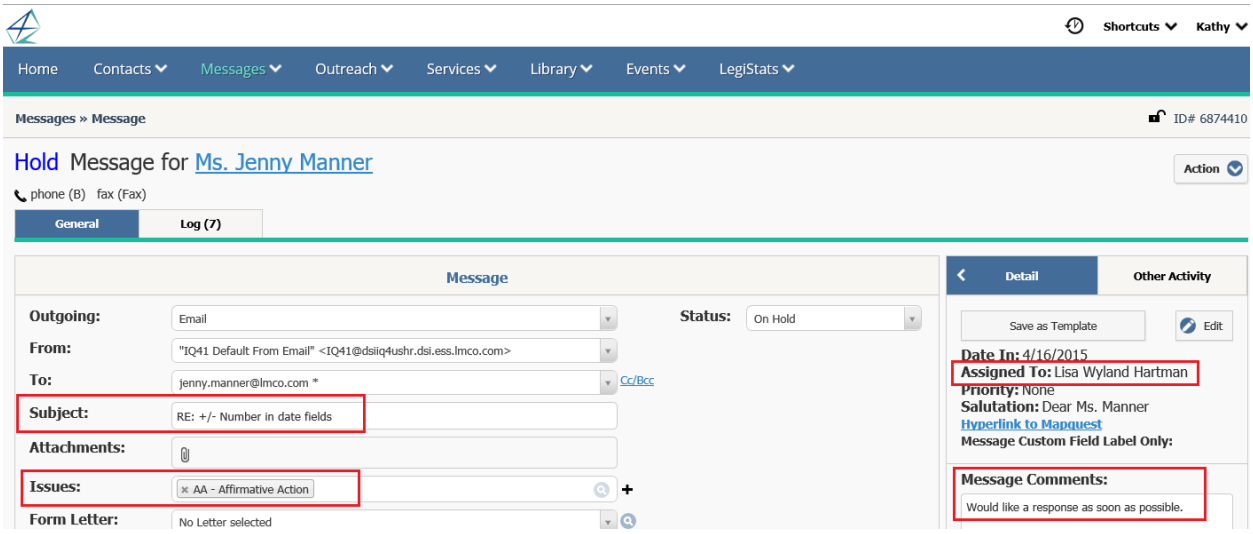
Figure 14



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 >



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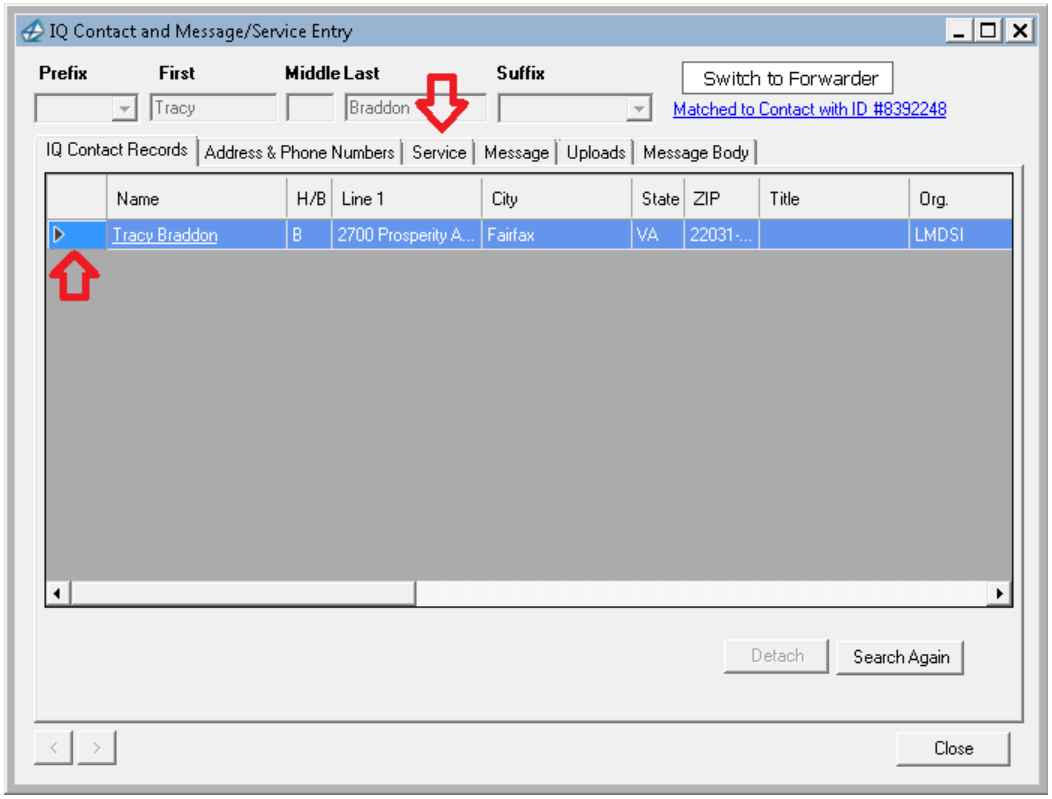
Creating an IQ Service Record from an Outlook E-Mail Message

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



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).

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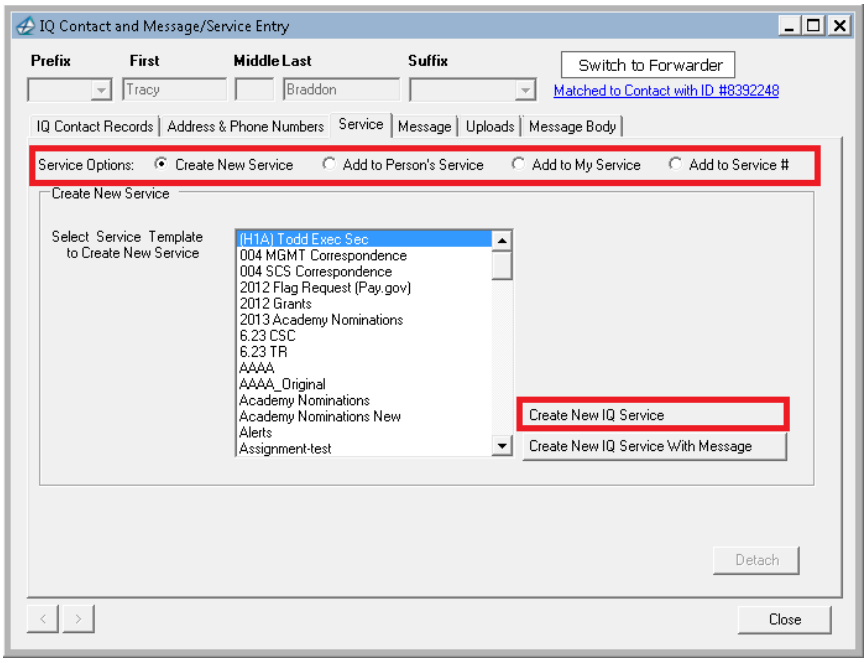
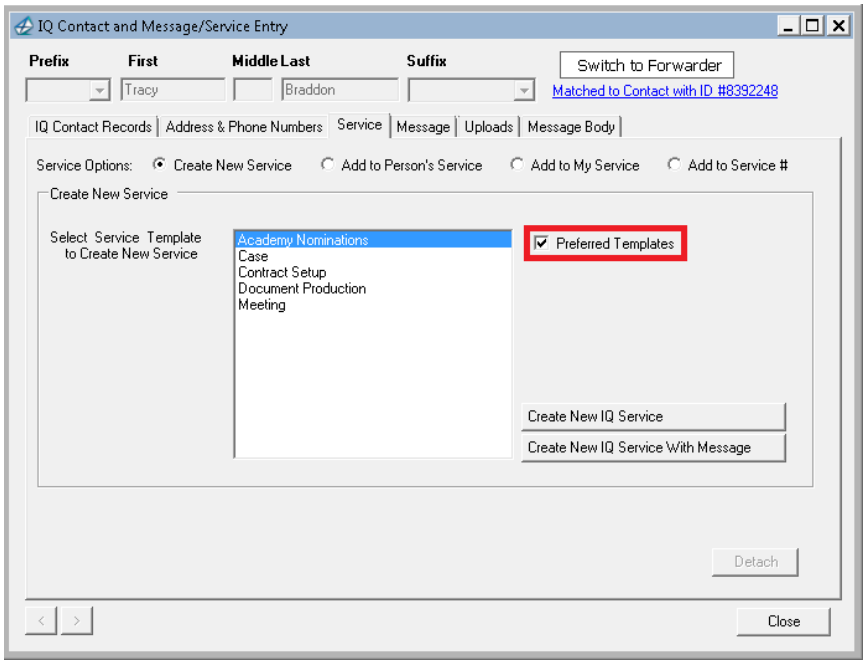
Figure 16



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)

Figure 17



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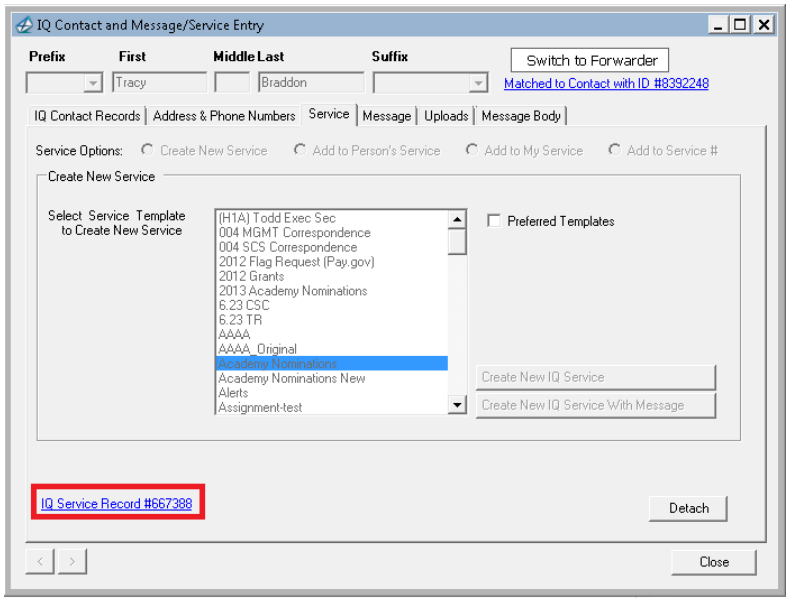
The text “IQ Service Record #” appears at the bottom of the **Service** tab on the *IQ Contact and Message/Service Entry* dialog (Figure 18). Click this link to open the IQ Service record.

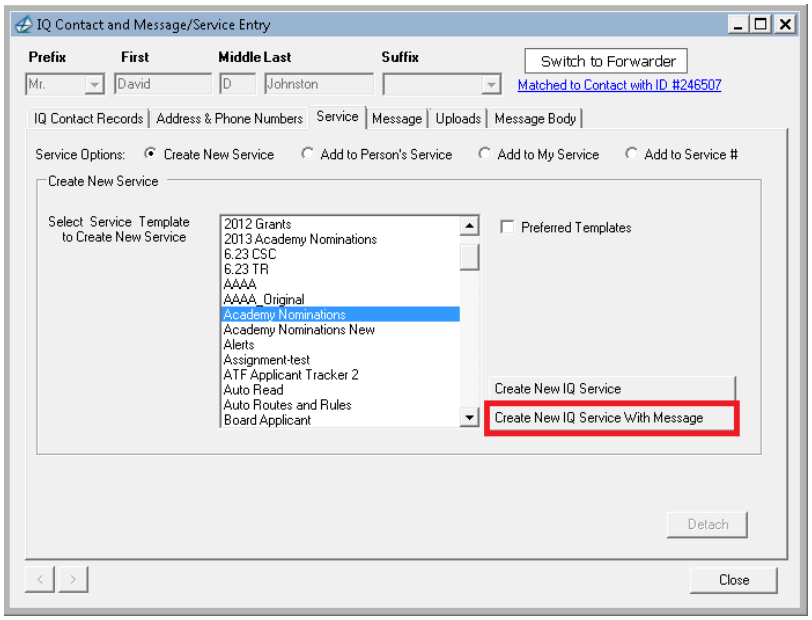
Figure 18



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.

Figure 19



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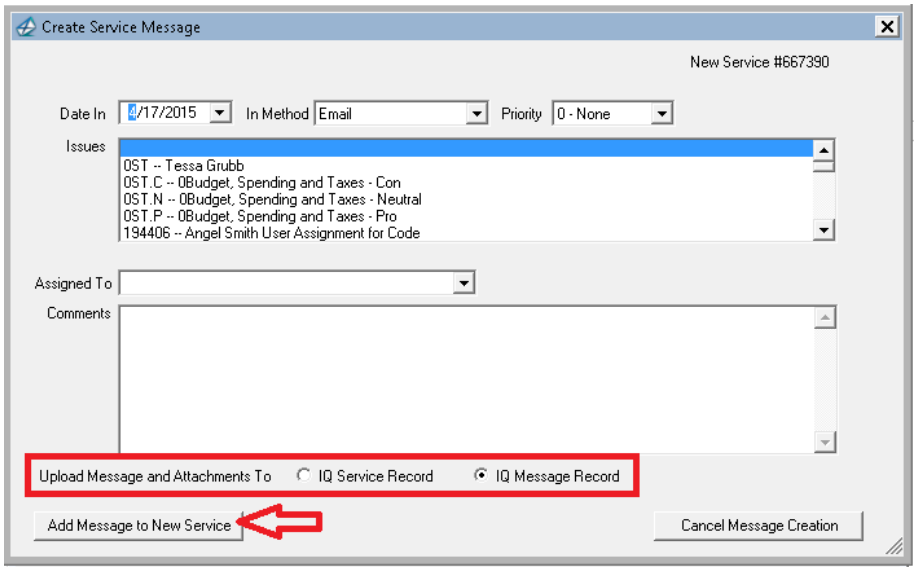
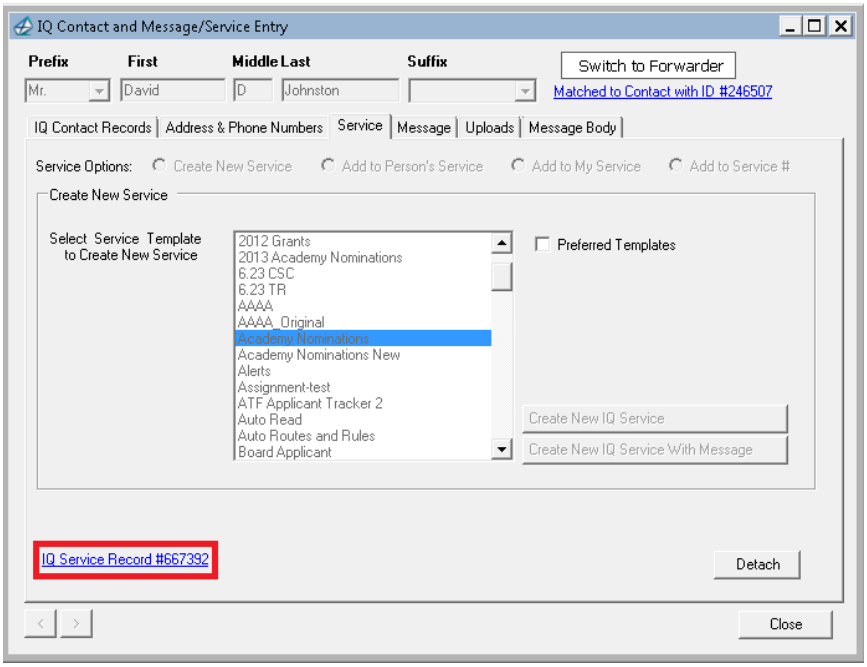
When you select this button, the *Create Service Message* dialog (Figure 20) appears so you can select the Message record information and whether or not you want to upload the outlook email message to the *IQ Service Record* or *IQ Message Record*. Click the **Add Message to New Service** button to create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

Figure 20



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.

Figure 21



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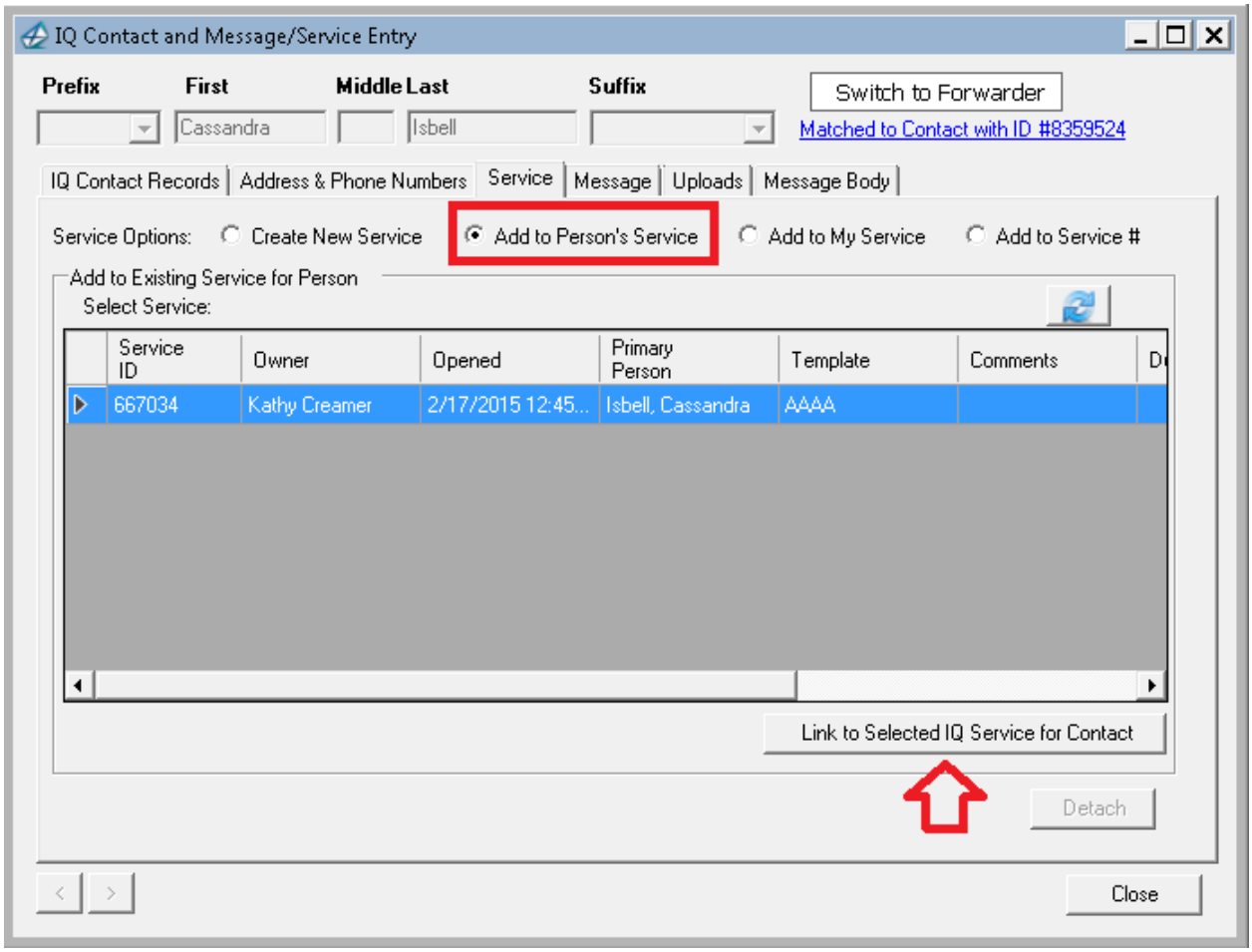
Adding an Outlook E-Mail Message to an Existing IQ Service

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



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.

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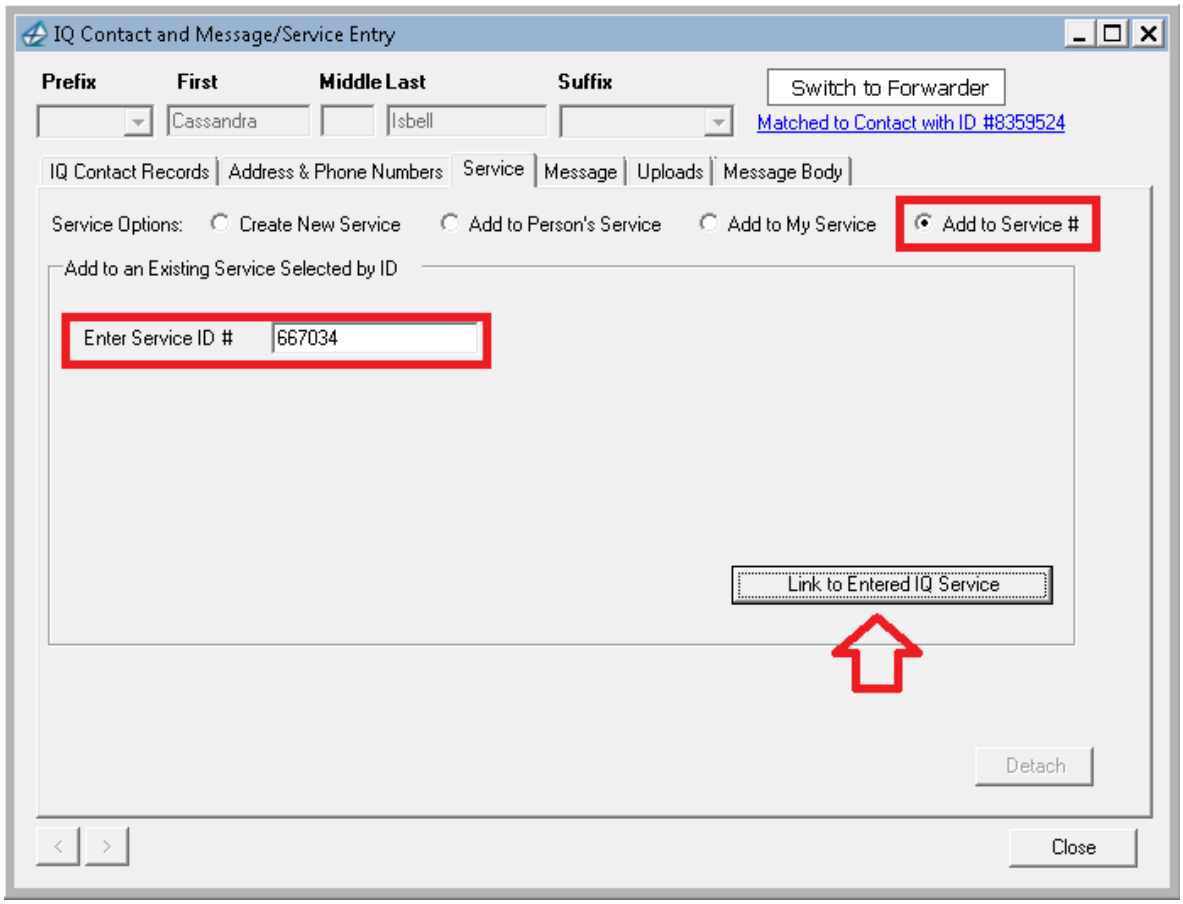
When you select the “Add to Service #” radio option, you can enter the Service ID# and select the **Link to Entered IQ Service** button (Figure 23). Then click **Yes** to confirm you would like to link the outlook message to the IQ Service.

Figure 23



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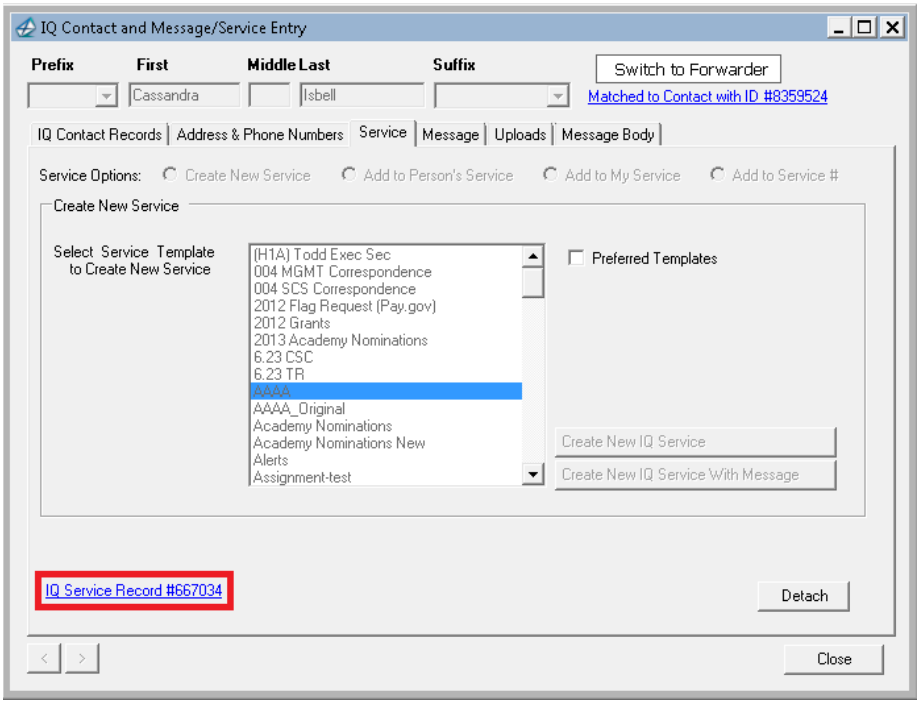
The text “IQ Service Record #” appears at the bottom of the **Service** tab on the *IQ Contact and Message/Service Entry* dialog (Figure 24). Click this link to open the IQ Service record.

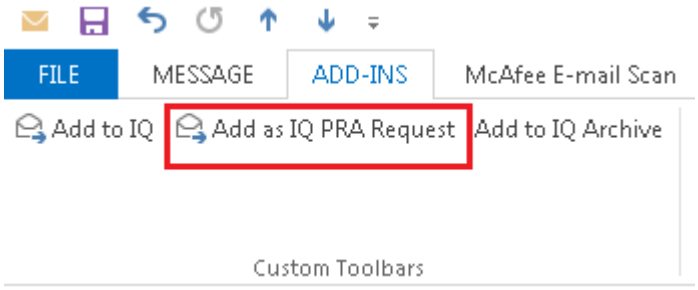
Figure 24



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)

Figure 25



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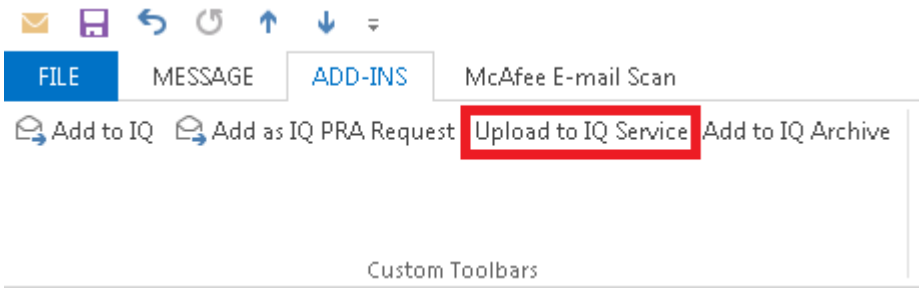
Uploading an Outlook Reply E-Mail Message to an Existing IQ Service

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 #nnnnnn (where nnnnnn is the IQ Service Record number).

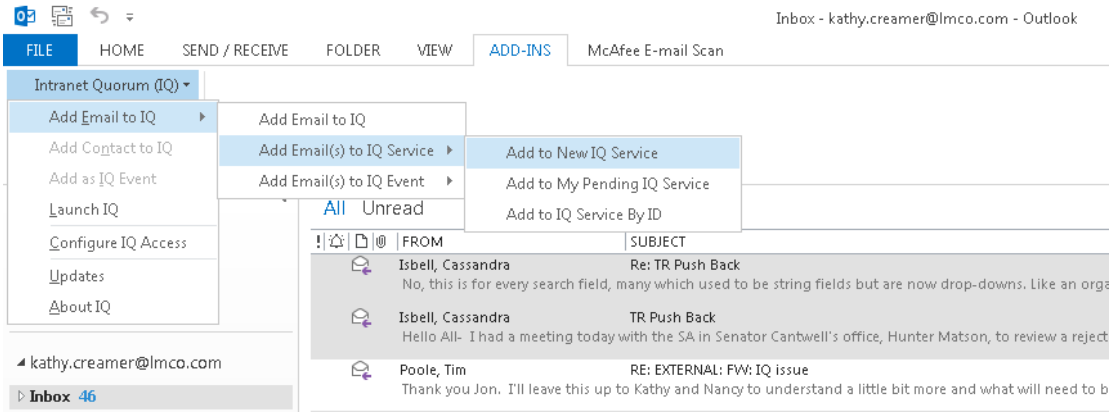
Figure 26



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



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)

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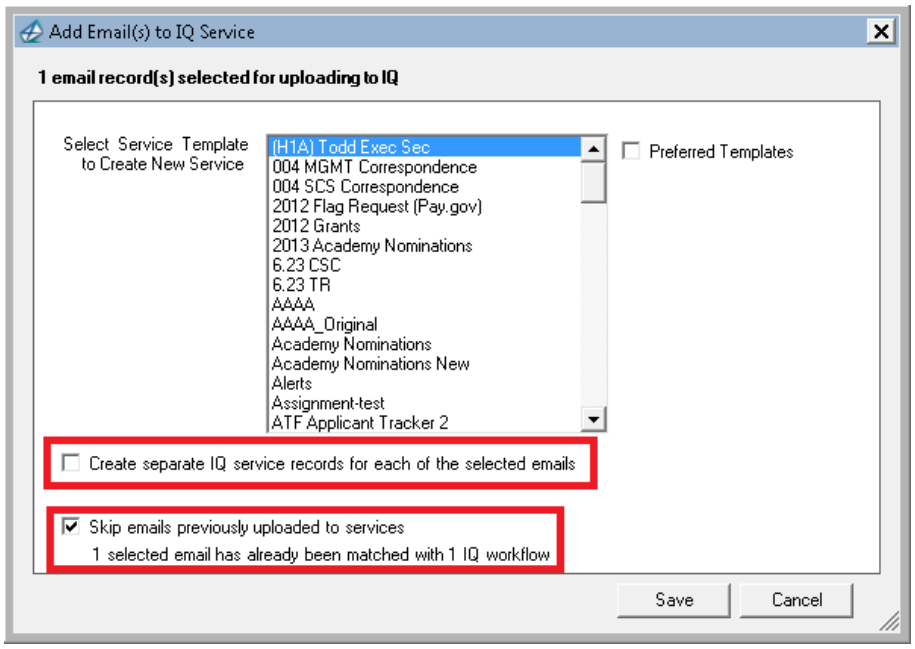
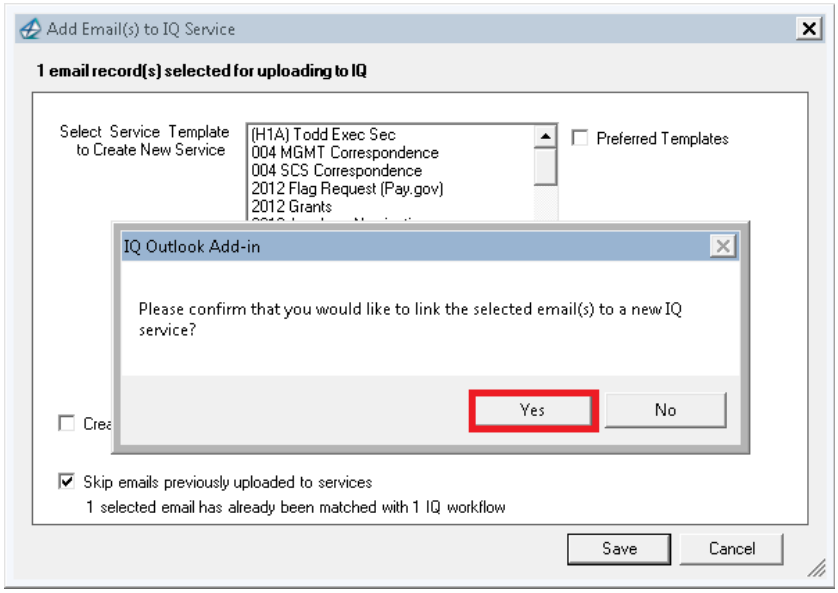
If one or more of the selected Outlook messages have been previously matched to an IQ Service record, “Skip emails previously uploaded to services” will be checked (Figure 28).

Figure 28



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.

Figure 29



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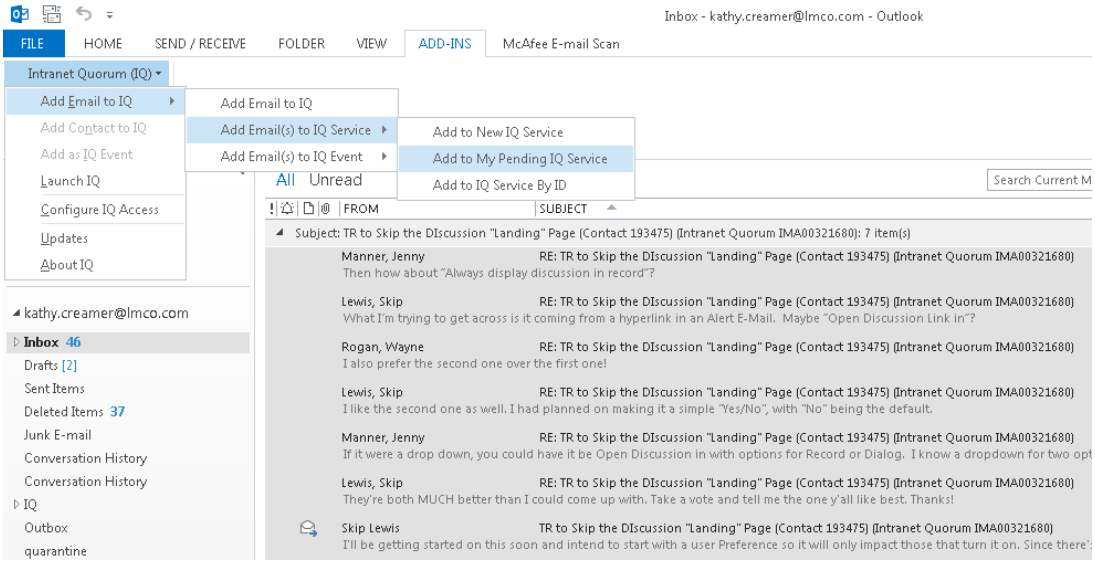
Adding multiple Outlook E-Mail Messages to a Pending IQ Service

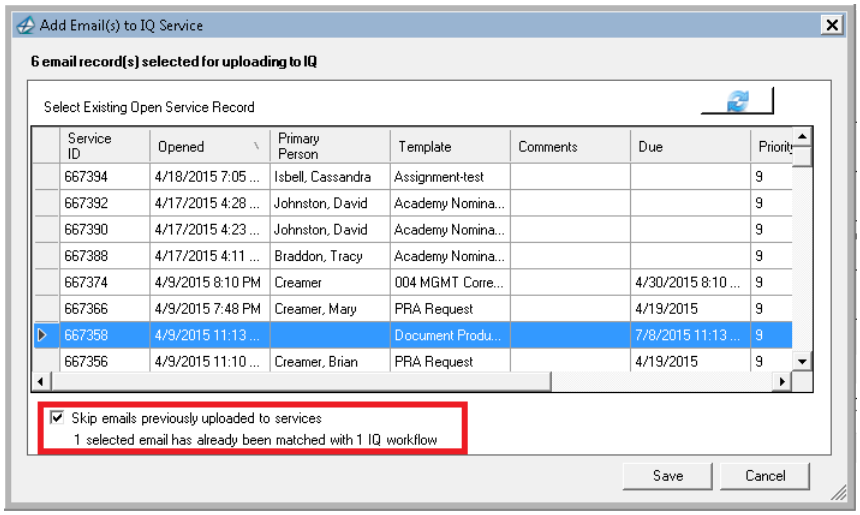
If there are multiple emails in your Outlook Inbox (or Sent folder) you would like to attach to one of your existing pending IQ Services, highlight the emails by holding down the CTRL key while you mouse click each message. Then select **Add Email to IQ** from the main Internet Quorum (IQ) menu and then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

Figure 30



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)

Figure 31



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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.

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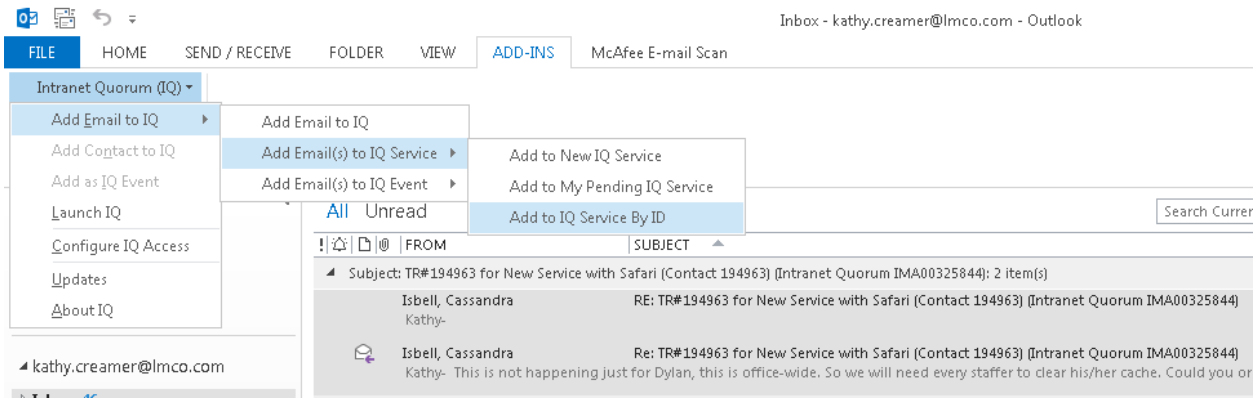
Adding multiple Outlook E-Mail Messages to an Existing IQ Service by ID

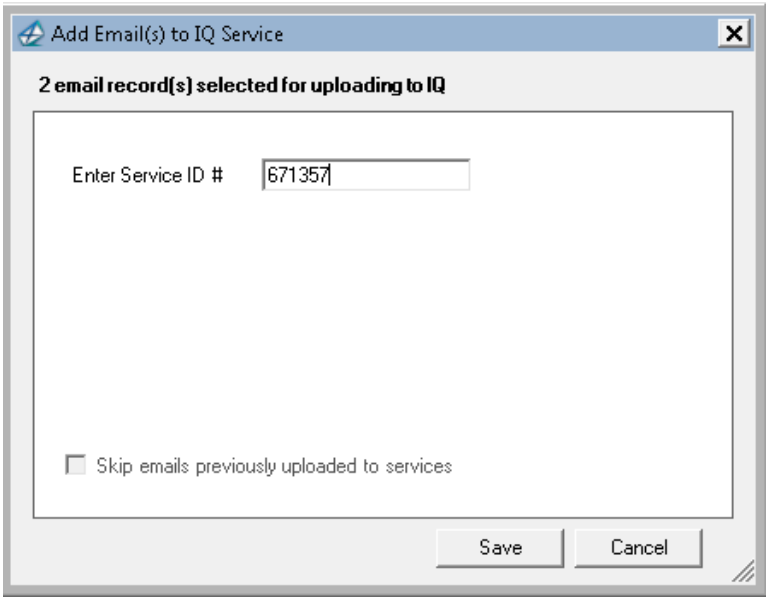
If there are multiple emails in your Outlook Inbox (or Sent folder) you would like to attach to an existing open or closed Service, highlight the emails by holding down the CTRL key while you mouse click each message. Then select **Add Email to IQ** from the main Internet Quorum (IQ) menu and then **Add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

Figure 32



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



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.

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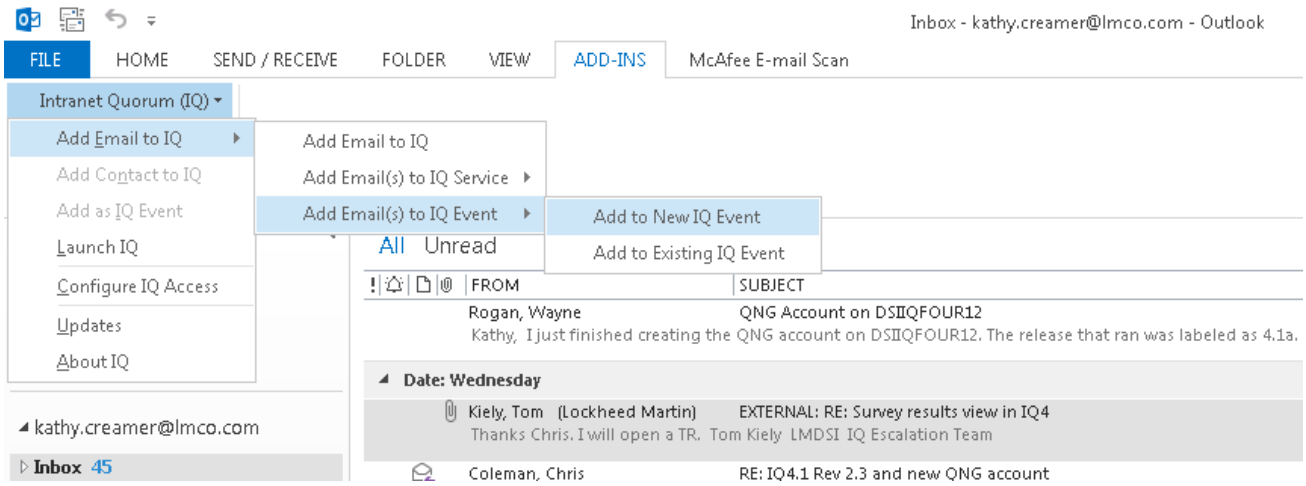
Adding one or more Outlook E-Mail Messages to a New IQ Event

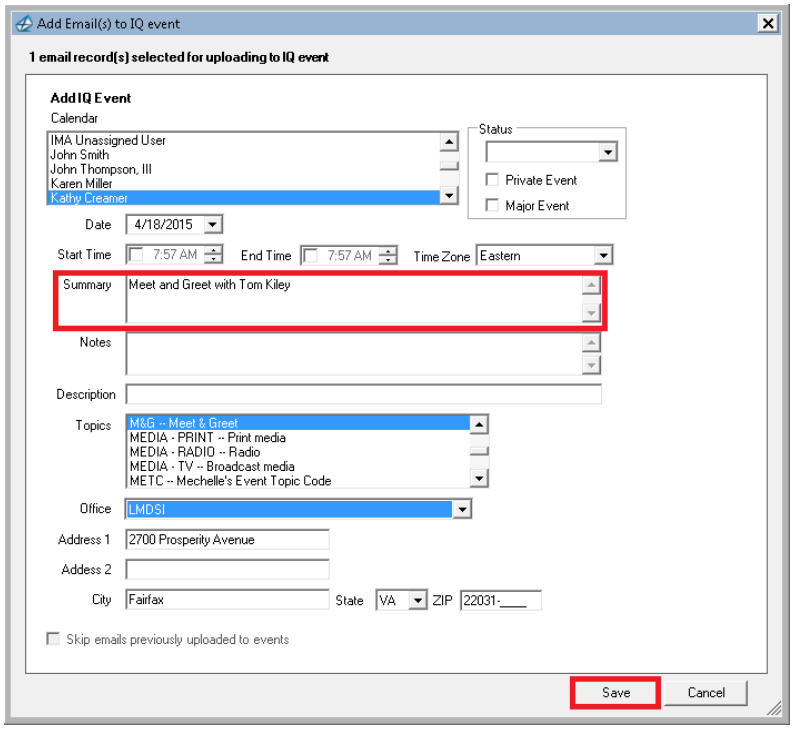
If there is one or more emails in your Outlook Inbox (or Sent folder) you would like to attach to a new IQ Event, highlight each email by holding down the CTRL key while you mouse click each message. Then select **Add Email to IQ** from the main Internet Quorum (IQ) menu and then **Add Email(s) to IQ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

Figure 34



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

Figure 35



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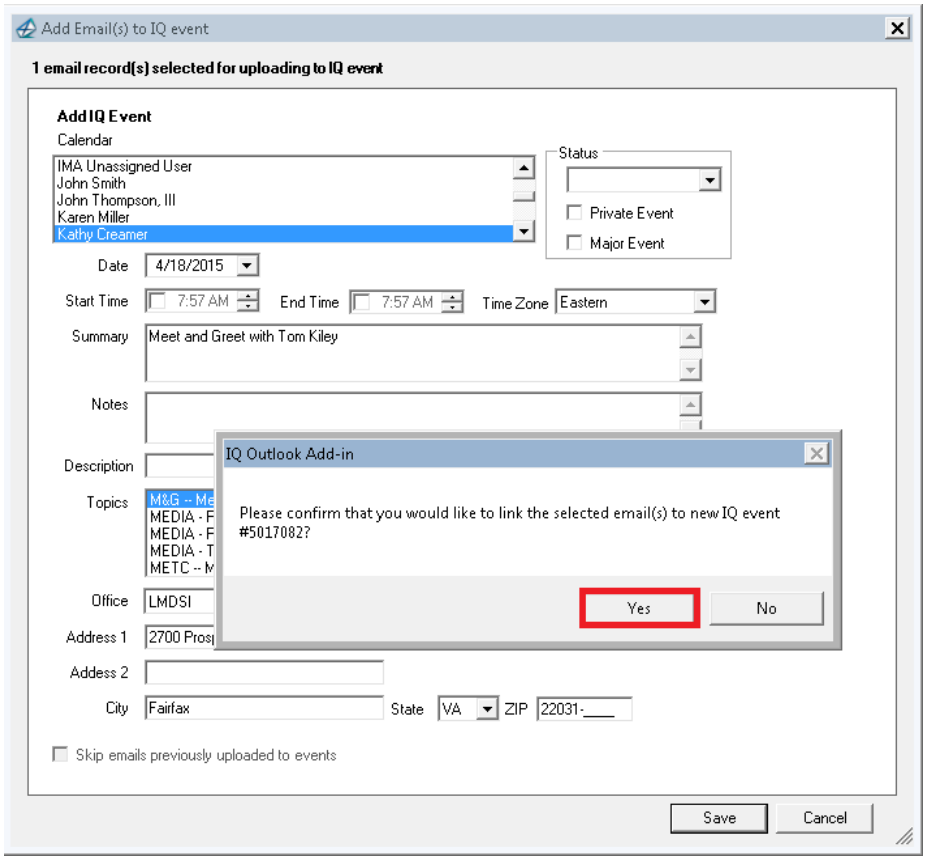
Click **Yes** to confirm you want to link the selected Outlook emails to the existing IQ Service (Figure 36). A status bar appears while the emails are being attached to the IQ Service. The dialog closes when the process is completed.

Figure 36



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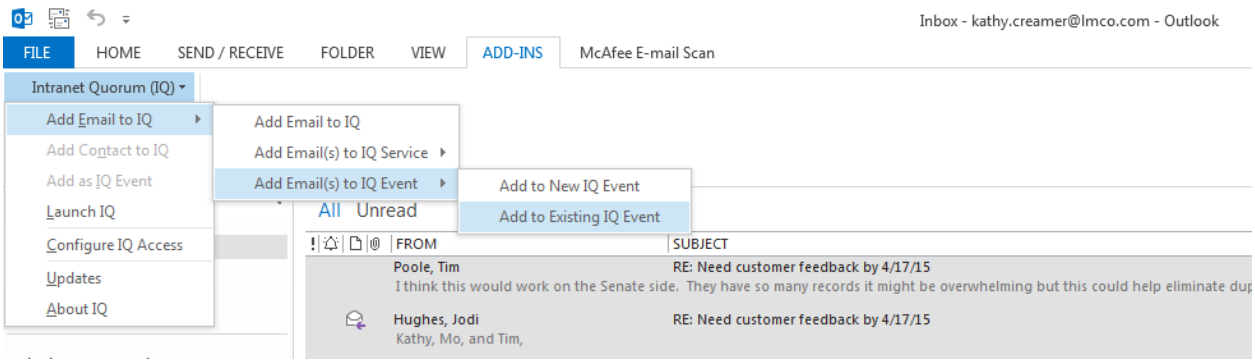
Adding one or more Outlook E-Mail Messages to an Existing IQ Event

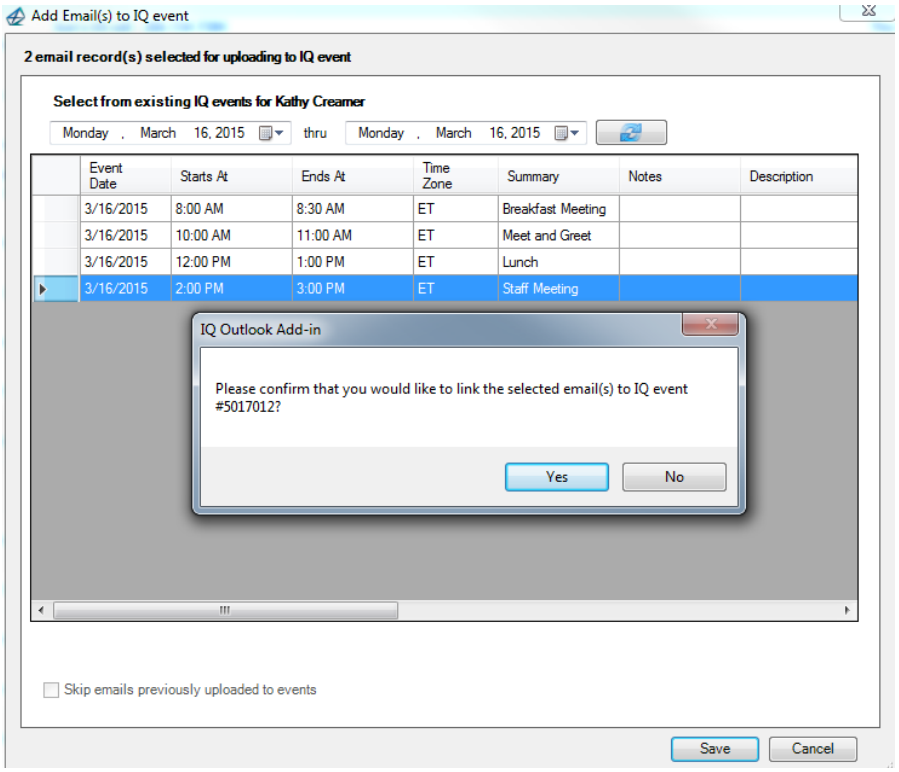
If there is one or more emails in your Outlook Inbox (or Sent folder) you would like to attach to an existing IQ Event, highlight each email by holding down the CTRL key while you mouse click each message. Then select **Add Email to IQ** from the main Internet Quorum (IQ) menu and then **Add Email(s)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

Figure 37



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)

Figure 38



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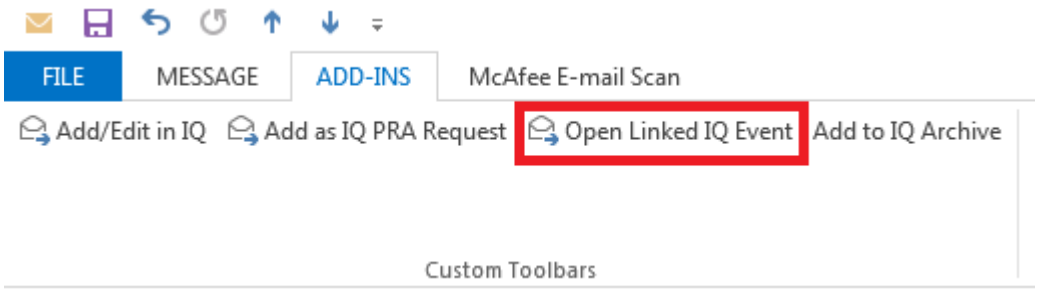
Click **Yes** to confirm you want to link the selected Outlook emails to the existing IQ Event (Figure 38). A status bar appears while the emails are being attached to the IQ Event. The dialog closes when the process is completed.

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).

Figure 39



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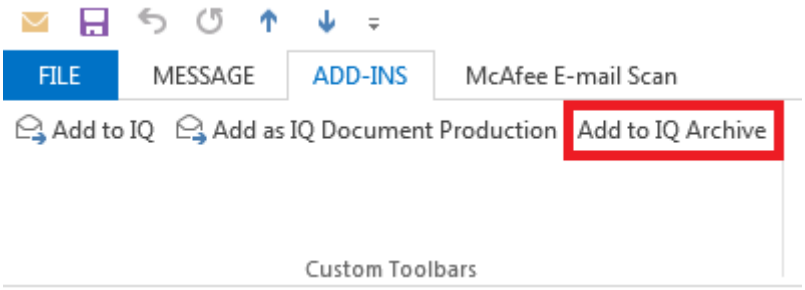
Adding an Outlook E-Mail Message to an IQ Archivist Folder

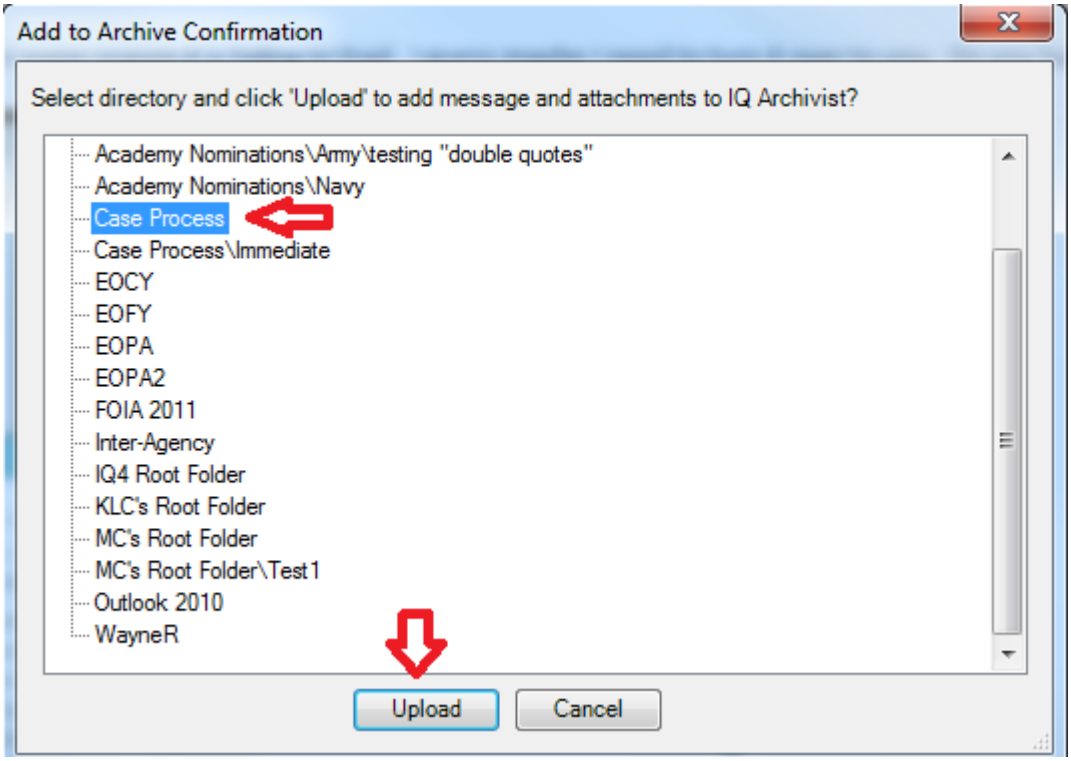
If your office has purchased the IQ Archivist module, the **Add to IQ Archive** button (Figure 40) will appear inside your Outlook E-Mail messages (if you have access rights to the Archivist module in IQ).

Figure 40



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.

Figure 41



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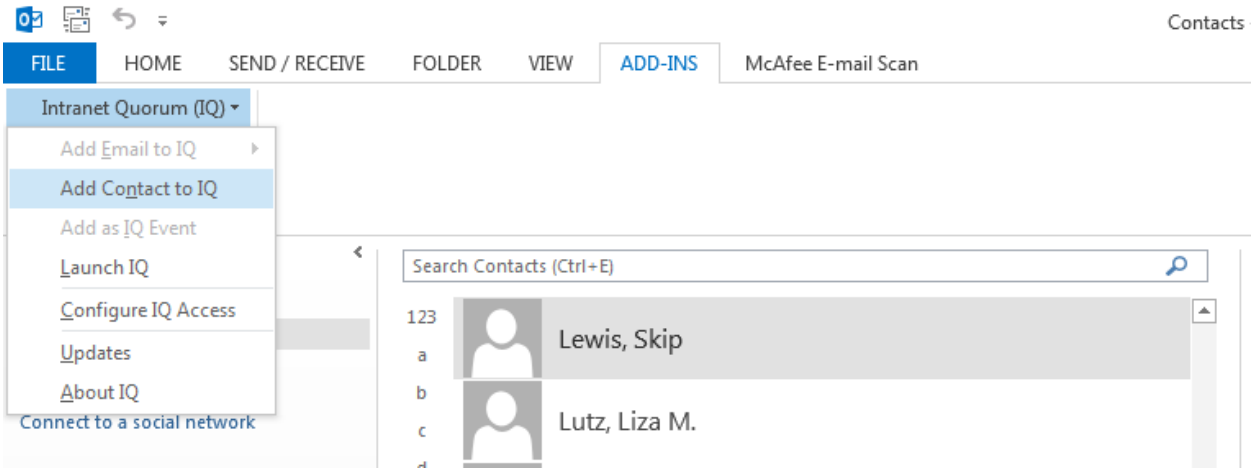
Adding an Outlook Contact to IQ

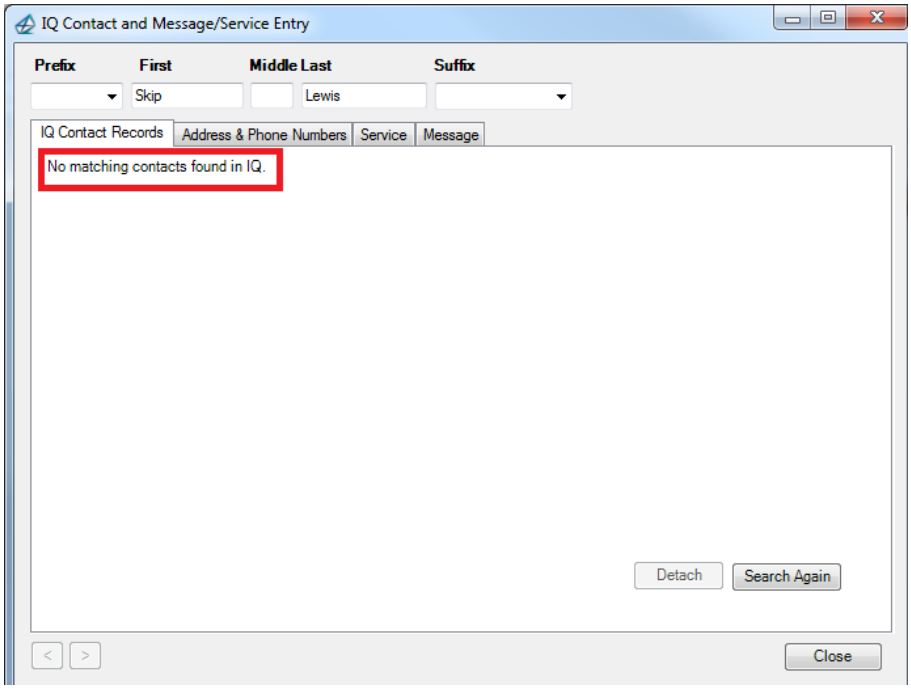
Highlight the contact name and select **Add Contact to IQ** in the main Internet Quorum (IQ) menu (Figure 42).

Figure 42



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).

Figure 43



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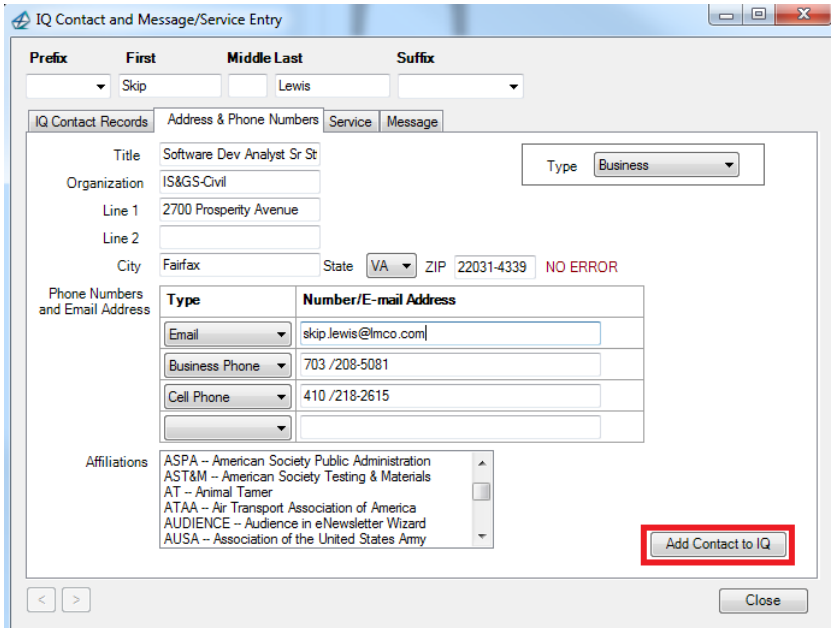
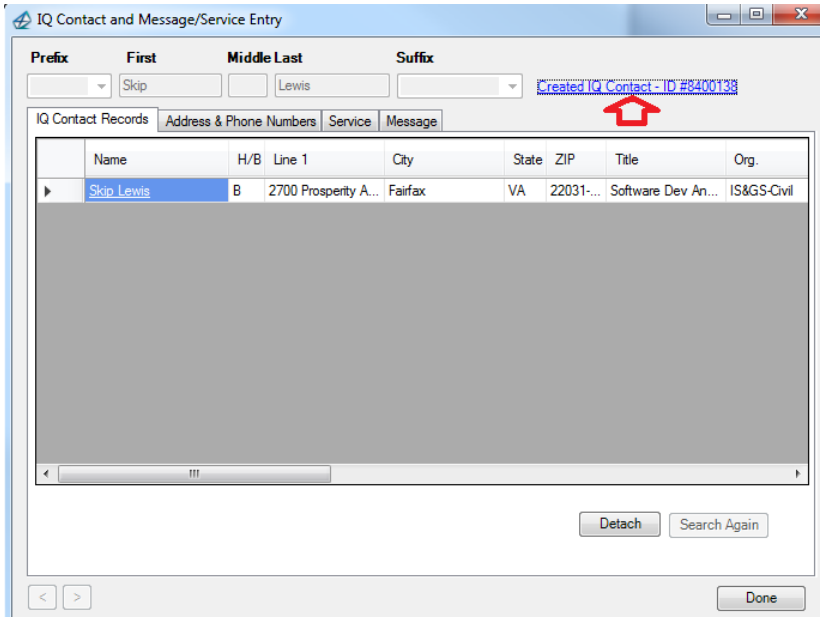
Click the **Address & Phone Numbers** tab and enter address and phone numbers to be included in the IQ Contact record. Click the **Add Name to IQ** button (Figure 44).

Figure 44



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.

Figure 45



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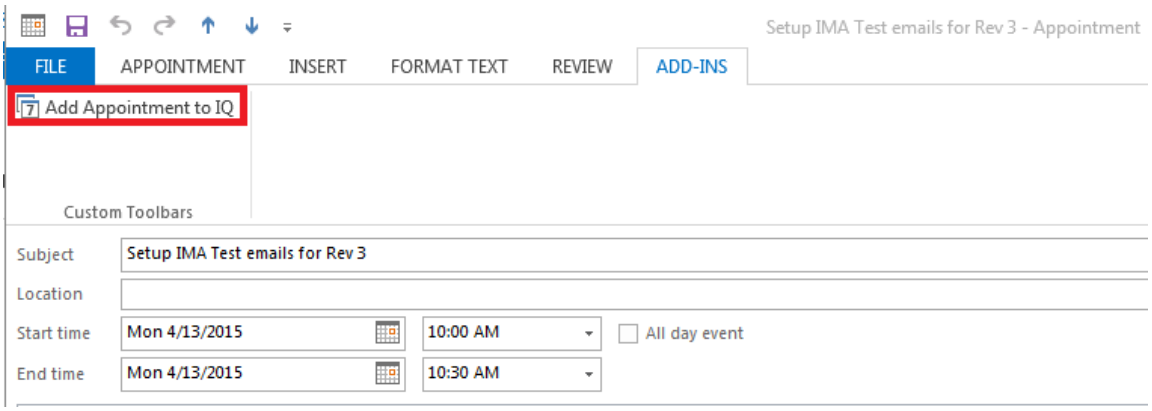
Adding an Outlook Appointment to an IQ Event

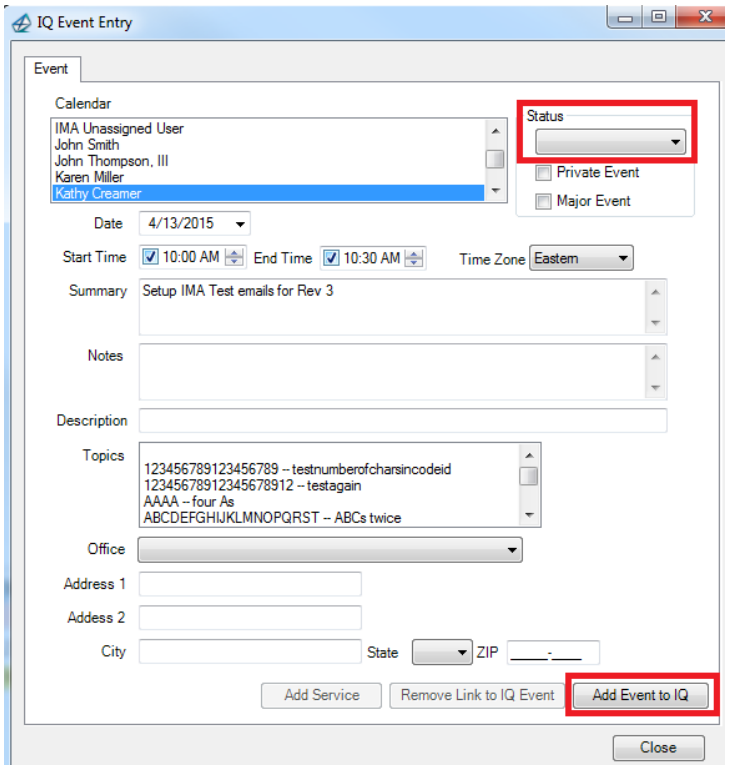
You can use the **Add Appointment to IQ** button located on the Add-Ins tab (Figure 46) to add an Outlook Appointment to your default IQ Calendar or another calendar you have access to.

Figure 46



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)

Figure 47



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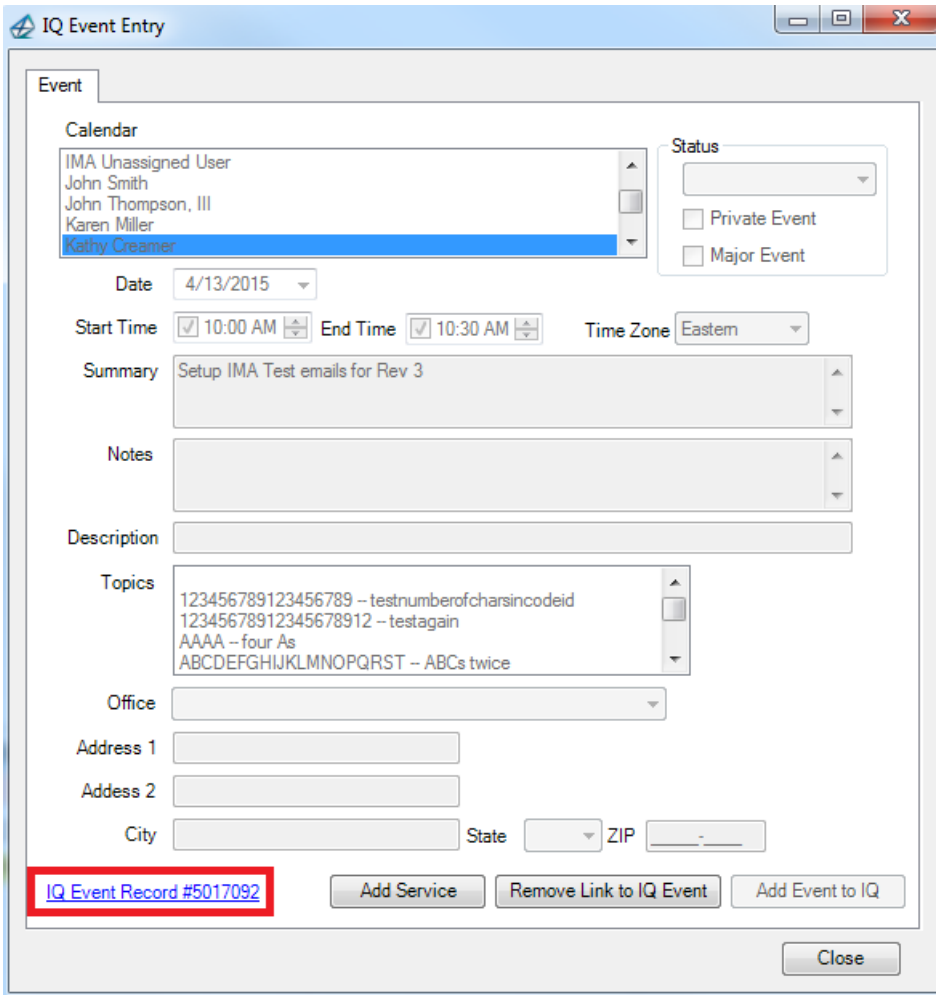
The text “IQ Event Record #” appears at the bottom of the IQ Event Entry dialog (Figure 48). Click this link to open the IQ Event Record.

Figure 48



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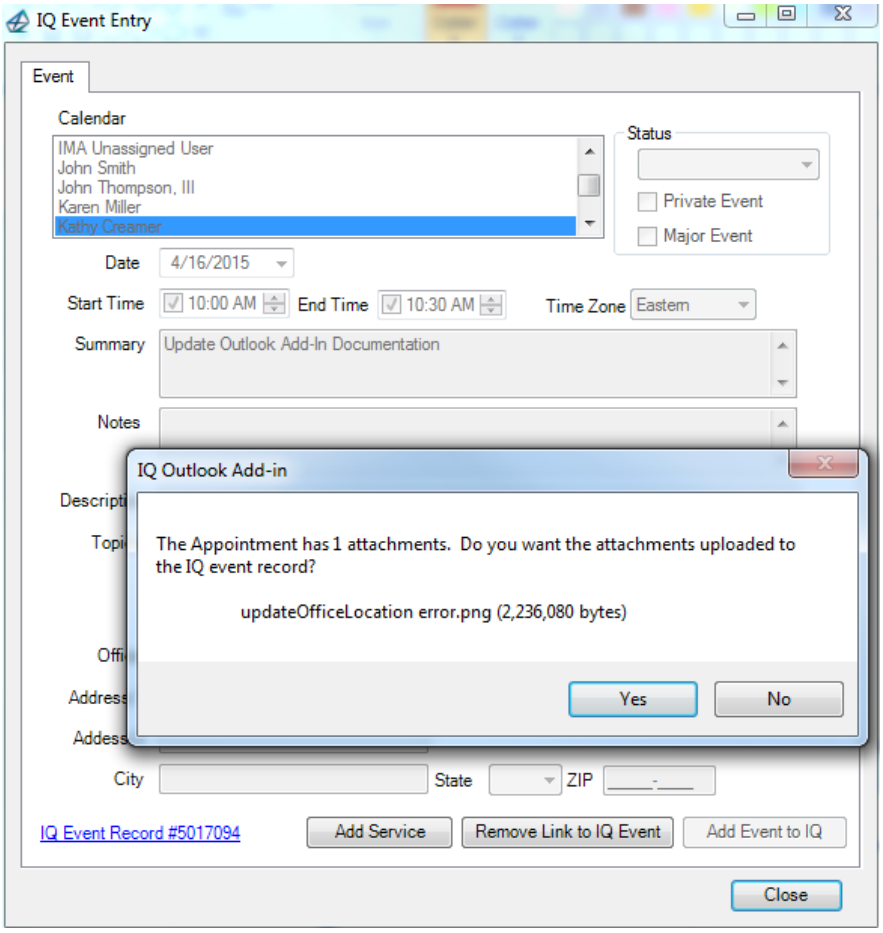
Note: If the Outlook Appointment contains attached files, IQ will prompt you with a list of the attachments and ask you if you would like to upload the attachments to the IQ event record (Figure 49).

Figure 49



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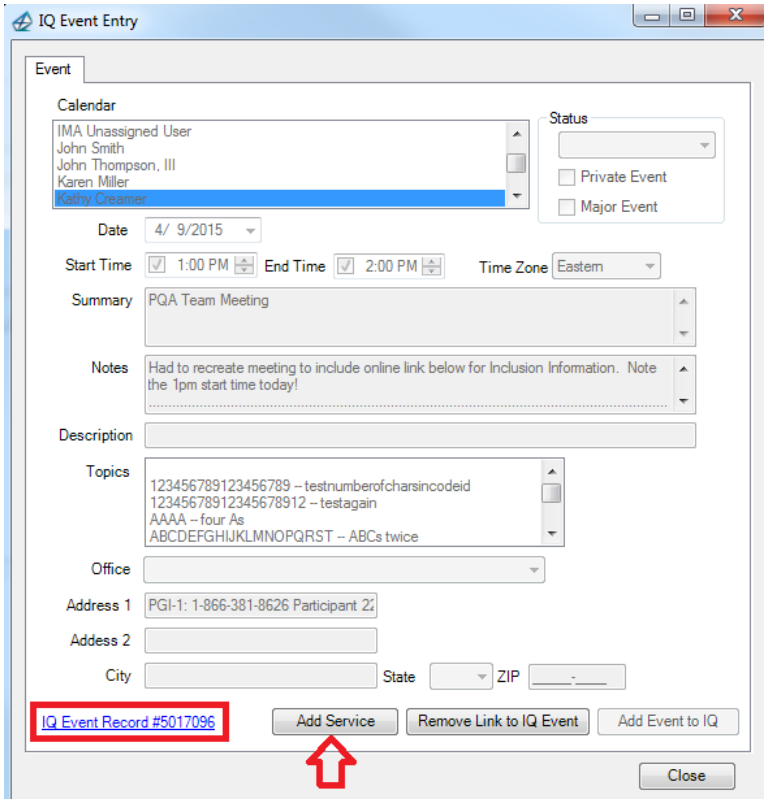
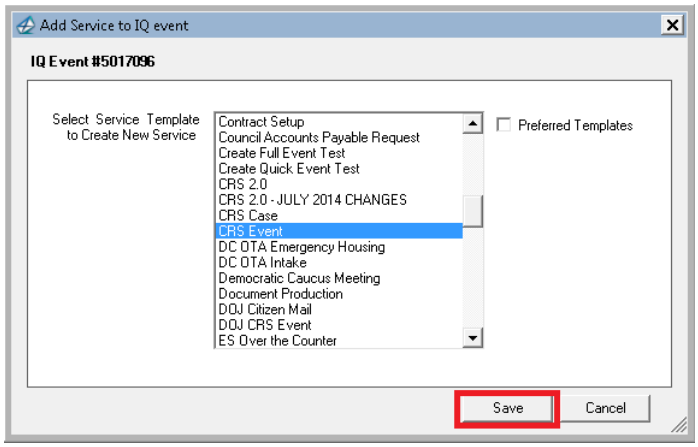
Adding an Outlook Appointment to a New IQ Service

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



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



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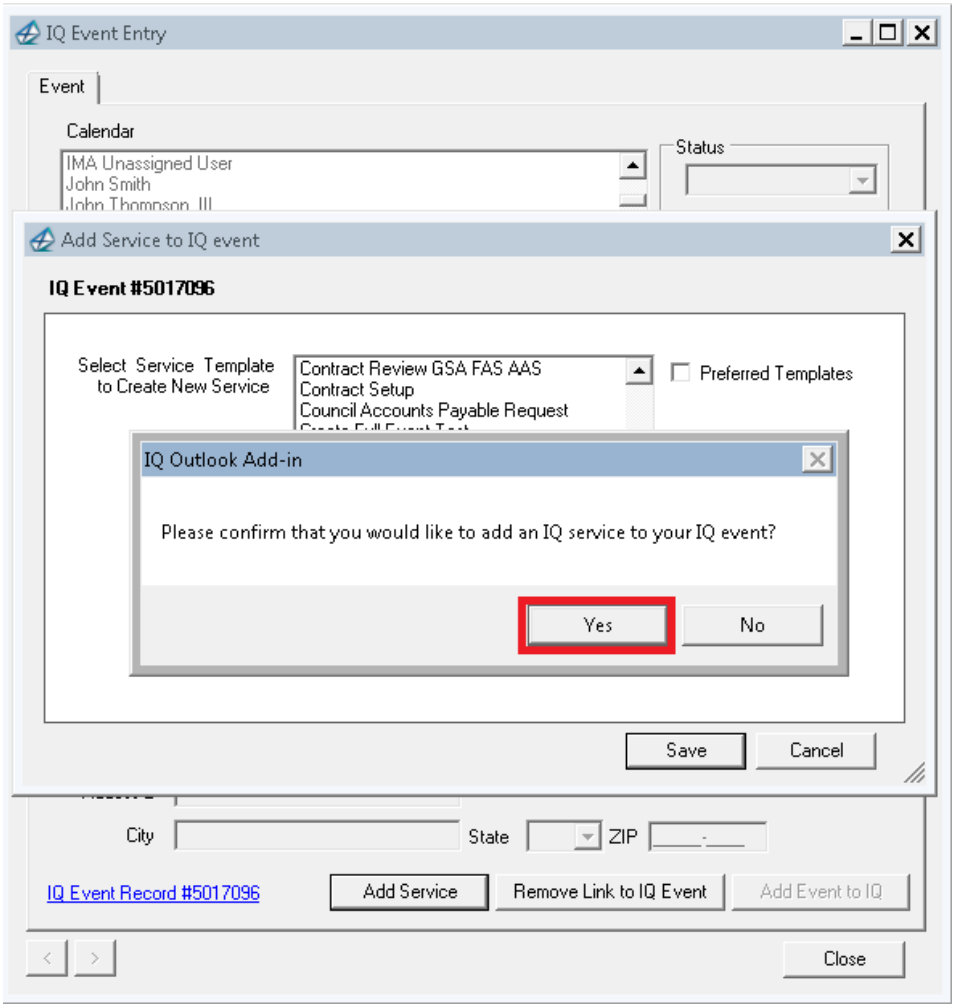
Click **Yes** to confirm you want to create a new IQ Service record that is attached to the existing IQ Event record. (Figure 51)

Figure 51



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.

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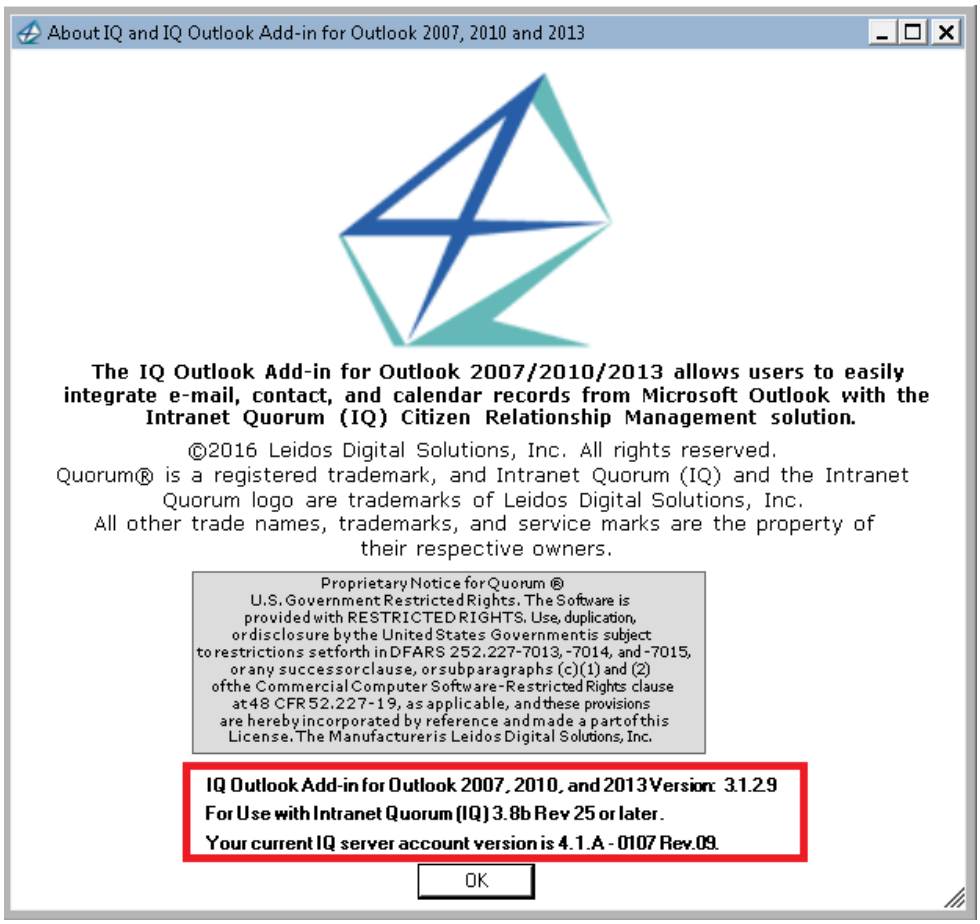
Keeping the Add-In in Synch with IQ Versions

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.