Intranet Quorum® 3

IQ Connect

Contents

Introduction

IQ Connect provides an integrated eNewsletter, eSurvey, and eForm solution which allows you to manage all of your communications with your constituents in one database. With IQ Connect you will also receive:

- An integrated HTML editor, which allows you to easily create your own eNewsletters and eSurveys with little or no HTML knowledge or experience.
- An image library to store graphics for eNewsletters, surveys, and web forms.
- The ability to export approved eNewsletter and eSurvey images from IQ to the Web.
- The ability to upload an eNewsletter directly to Twitter or Facebook.
- The ability to include a YouTube video in an eNewsletter.
- The ability to view Facebook posts and search IQ for matching People records in order to respond using IQ's Correspondence Management features.
- Incoming and Outgoing Email analysis capability.
- Easy-to-use content management to track which recipients have read your e-communications.

Intended Audience

This training guide is recommended for users who create newsletters, surveys or web forms and wish to manage these communications using the IQ database.

Overview

About the eNewsletter Wizard

The eNewsletter Wizard streamlines the eNewsletter creation and correspondence process for those customers using IQ Connect. The Wizard allows you to select from a library of eNewsletter templates, edit a template, enter content, select the audience, and send the eNewsletter. IQ also provides information on the progress of eNewsletters as well as view rates.

You may also embed videos, survey information or a web form in an eNewsletter. In addition, you can link an eNewsletter to a Facebook or Twitter account, allowing upload to those sites for wider reach of your content as well as the ability to track usage and approval of your eNewsletter.

About eSurveys

With IQ Connect you have the ability to create eSurveys and deploy them on a website or in a targeted mailing. Data analysis of the results of the survey is tracked based on the survey, specific form letters to which the survey is attached, specific mailings, and results can also be viewed in individual respondent People records.

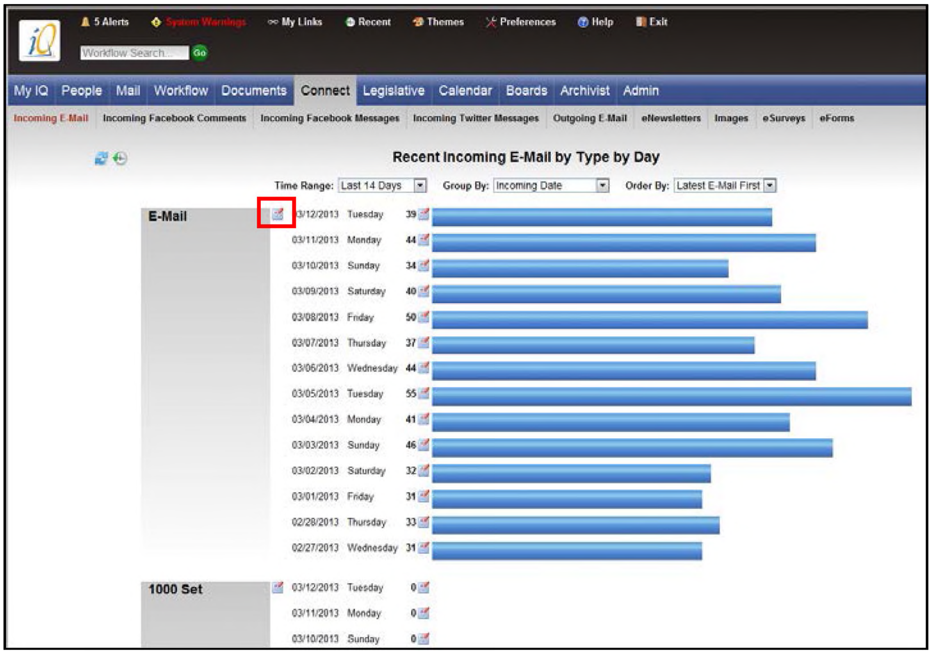
About eForms

The eForms feature allows you to create links to web forms to collect information for creating mail responses or workflows from a website or from an email.

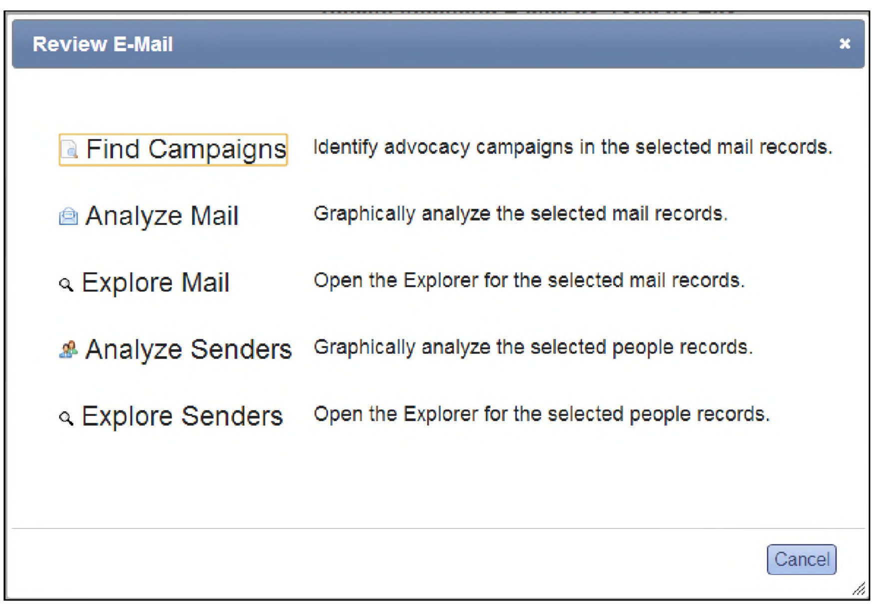
eForms are kept on the IQ Connect server. Data entered into an eForm is transferred to the IQ Database through secure, encrypted web services. This functionality runs on the same background job that retrieves eSurvey information.

Incoming Email

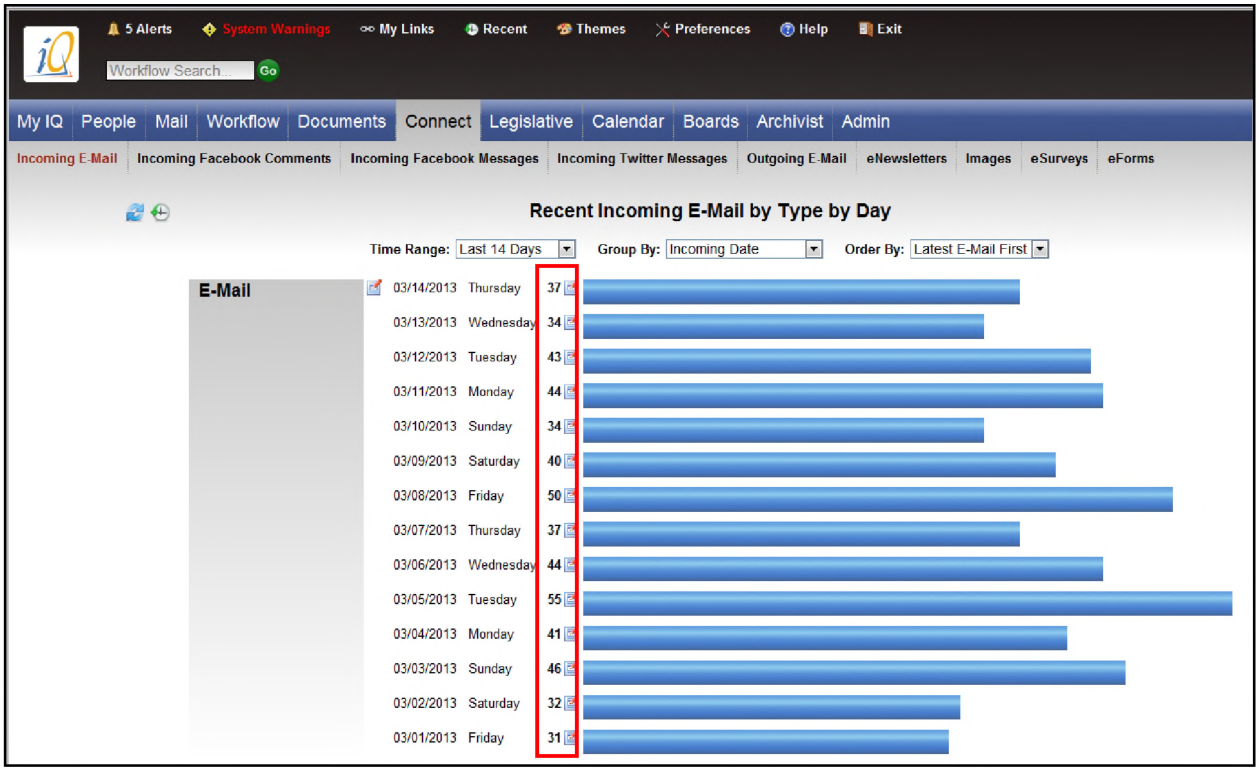
The Incoming Email page is designed to group incoming emails from the previous 14 days, 12 weeks or 12 months based in Issues, Email Subjects, or Incoming Date. You are able to order by Newest or Oldest Emails First for Emails grouped by Incoming Date or Incoming Date by Set. The criteria chosen for viewing Incoming Email are "remembered" for the user, until changed by the user. The settings are sticky even after logging out and back in.



Once you have selected the criteria to analyze, click the Edit icon to perform mass changes on the selected groups of emails.

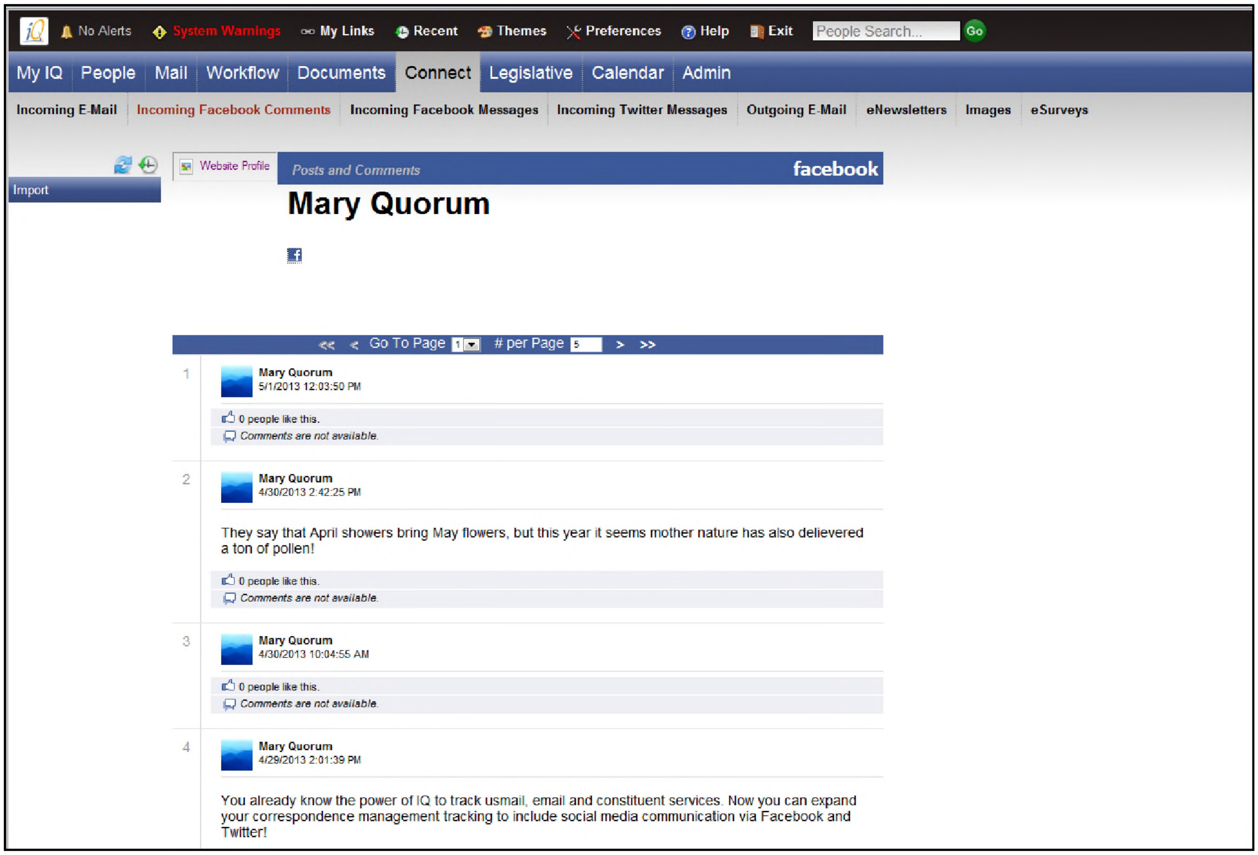


You can perform mass change actions on subsets of incoming emails as well by selecting the Edit icon to the right of the email count for the specific row of emails.



Incoming Facebook Comments

IQ 3.8c interacts with Facebook in two ways. First, configuring Facebook access from within IQ allows you to upload and post eNewsletters directly to a Facebook fan page and receive data on the number of likes and shares. Second, you are able to import Facebook comments and messages for review within IQ. Once reviewed, you can decide if you would like to manage email responses to a Facebook comment or message from IQ, or if you would like to store messages from particular constituents in IQ.

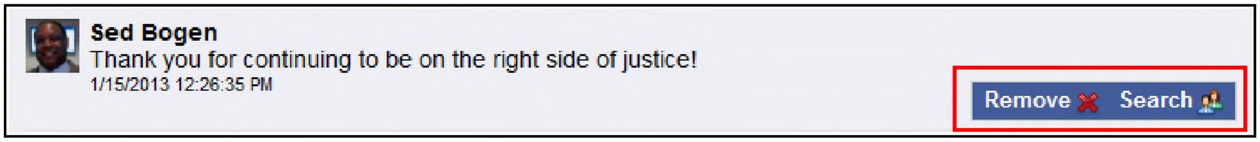


The Incoming Facebook Comments section of the Connect module allows you to import current Facebook posts. To do so, click the Import button on the Actions menu. This will automatically import the most recent 25 Facebook posts.

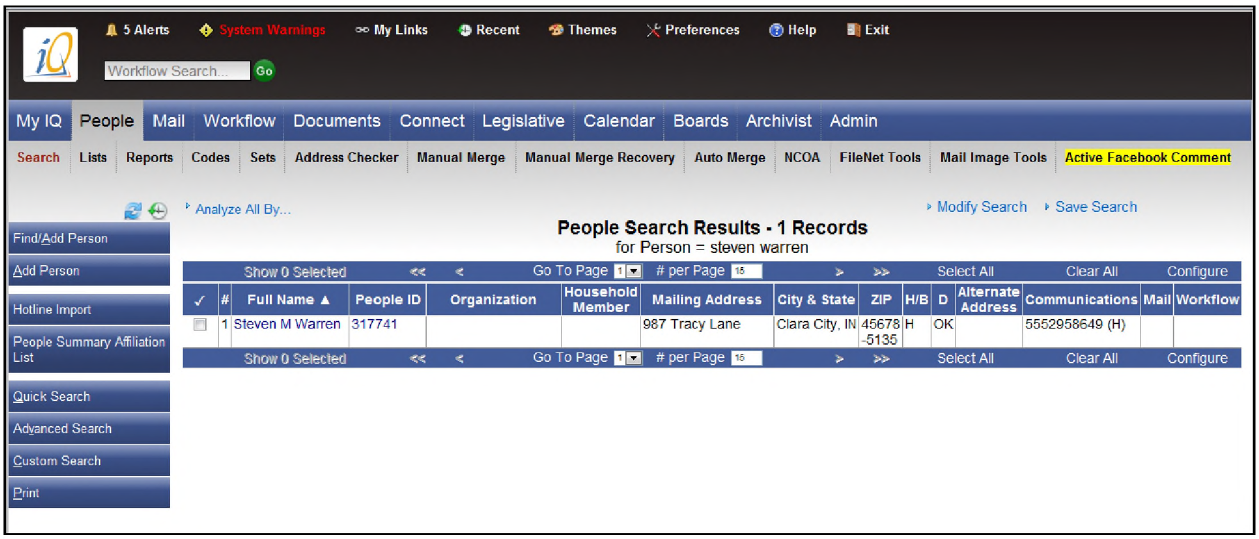
To see all responses to a specific post, click "Review and respond to the comments" under the post. The number of comments appears in parentheses.

When you open the list of comments, you will see each response. You are able to search the IQ People database for possible matches, or remove this post from IQ. Removing the post from IQ does not remove it from Facebook.

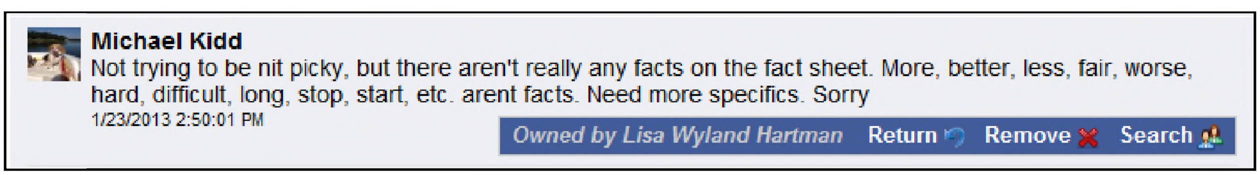
Once an IQ user has begun to search for matches, you will see the information "Owned by <User> listed below the comment.



Clicking "Search" opens the People Search results page for possible matches. If you have located the People record of the person posting on Facebook, you may select the People record, and Add Mail to respond. Notice the yellow highlight indicating that you are still working with an Active Facebook Comment.



When you are actively working with a Facebook comment, you have several options. You may return this comment to an unselected status, remove this post, or perform another search for a People record.



How to import and process Facebook Posts and Comments:

1. **Click the Connect module tab and select Incoming Facebook Comments.**

2. **Select the Import action. IQ will prompt you to log into the Facebook account which contains the messages you would like to import into IQ.**

3. **IQ will display the Import Messages Data from Facebook dialog with a count of the number of messages imported. IQ will close the dialog once the import is complete.**

4. **Imported posts and comments will appear in the All Posts view. Click the Review and respond to the comments link to review the comments for a specific post. Comments appear in the All Queues view with a *Remove* and *Search* or *Reply* link next to each comment.**

- **Select the Remove link to move the comment from the All Queues view to the Removed view.**

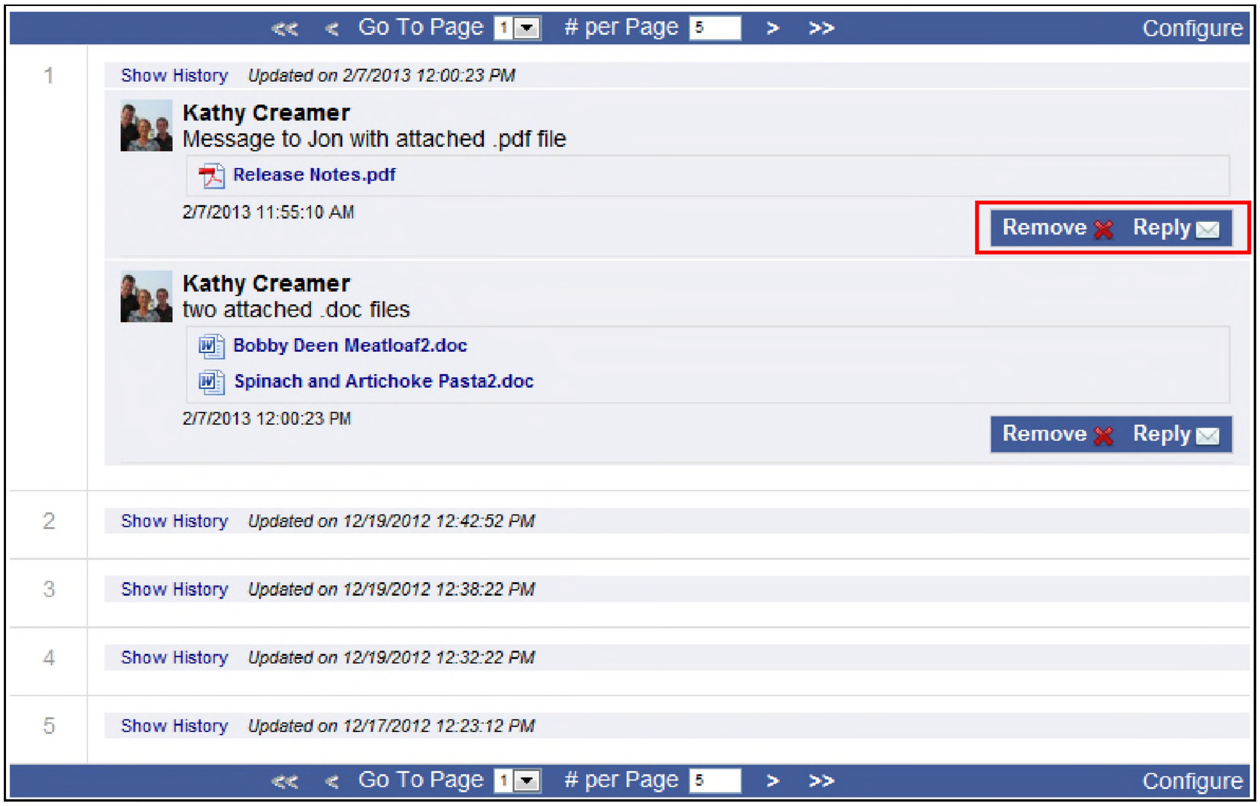
- **Select the Search link to search for an IQ People record. IQ displays the People Search Results with records that contain the same First and Last Name. If you find a match, select the checkbox next to the record and select the Add Mail action. If you do not find an existing People record, select the Add Person action. IQ displays the New Person record page with the First and Last Name. Select the Add Mail action to create a Mail record for the Facebook comment and create an outgoing reply. (See the following for details).**

- **Select the Reply link to create a Mail record for the Facebook comment and create an outgoing reply. IQ attaches the incoming Facebook comment to the Mail record. Select the Send FB Message action to open a dialog where you can type the reply message. Click the Send button when you are ready to send the Facebook reply message. Note: IQ will prompt you to log into Facebook, if you are not already logged in as the Facebook administrator. IQ will update the People record with the person's Facebook ID. The completed Facebook message will appear in the Completed view.**

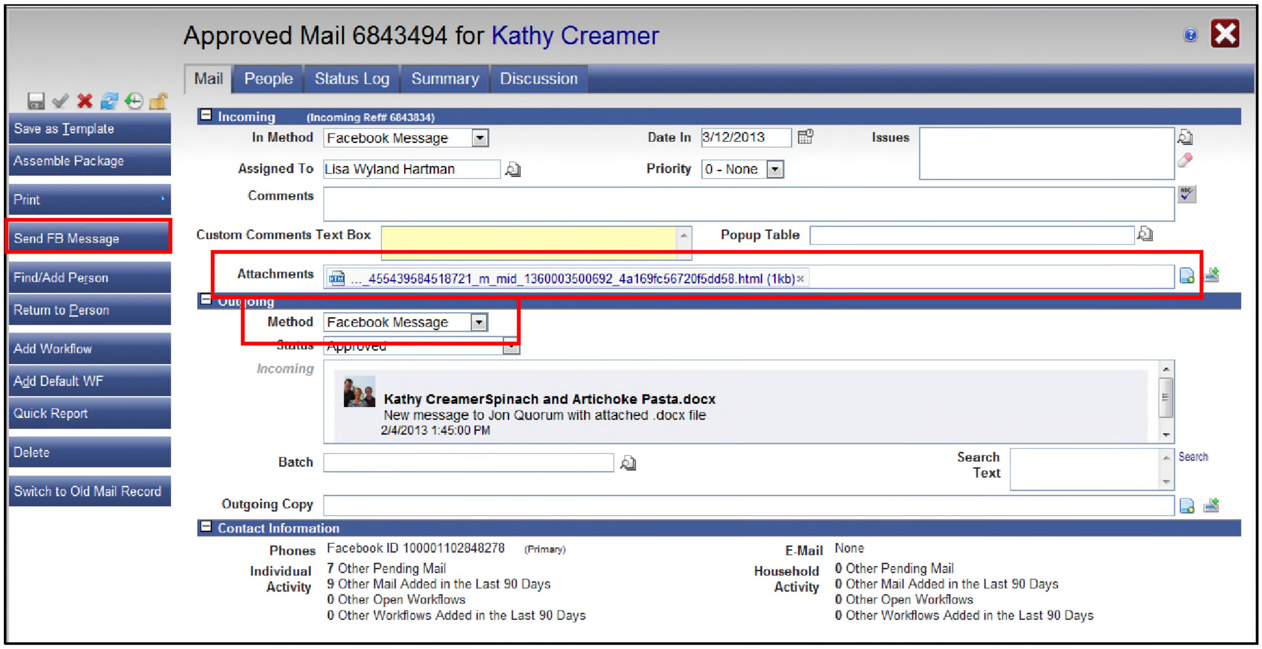
Incoming Facebook Messages

You can also import messages from your Facebook account for review and response in IQ. In the Incoming Facebook Messages section, select the Import Action to import the 25 most recent messages. Attachments to those messages are also uploaded.

Click Reply to open an IQ Mail record with an Out Method of Facebook Message.



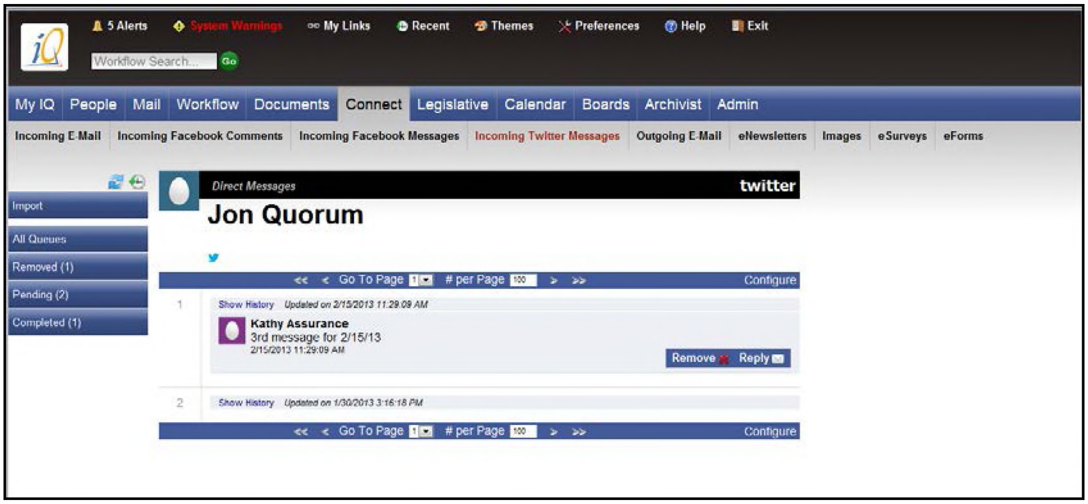
This allows you to both respond with an IQ Mail record that will be stored in the database and attached to the People record, and will also appear on the recipient's Facebook account as a message reply.



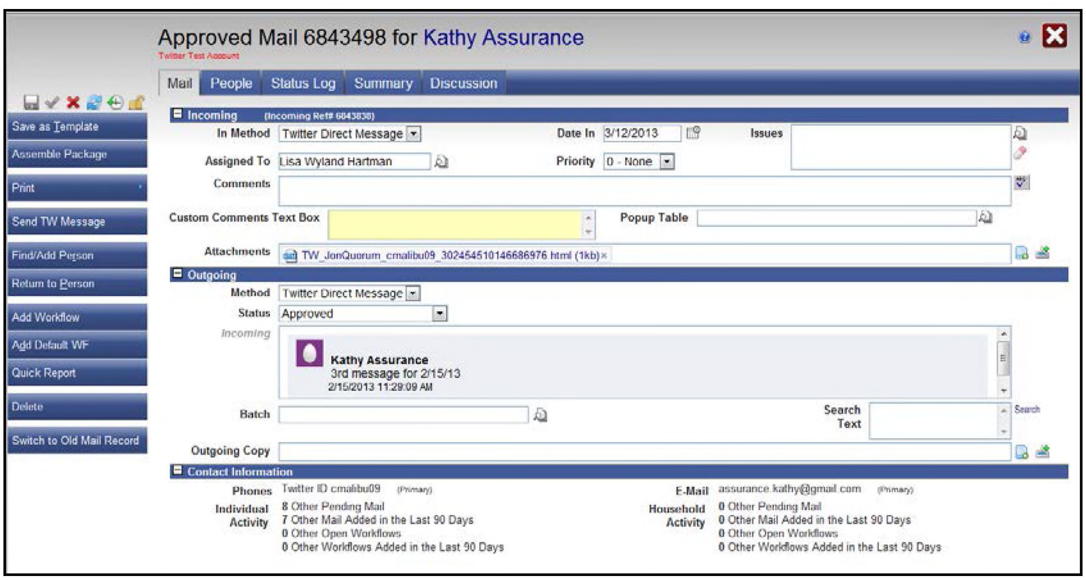
Click "Send FB Message" on the Actions Menu to open a dialog box in which to enter your Facebook Reply Message.

Incoming Twitter Messages

You have the ability to import and view Twitter Direct Messages and create IQ People and Mail records. The selected existing People record and newly created record is updated with the Twitter ID when a Mail record is added for the Incoming Twitter Direct message. Outgoing Twitter Direct Messages can be sent from IQ for imported messages that have not already been responded to in Twitter.



Click Reply to open a Mail record page.



The Incoming Method and Outgoing Method are automatically populated with Twitter Direct Message. Any attached files are also included.

To reply using a Twitter Message, click "Send TW Message" on the Actions Menu. This will open a dialog box that will allow you to type and send the Twitter message.

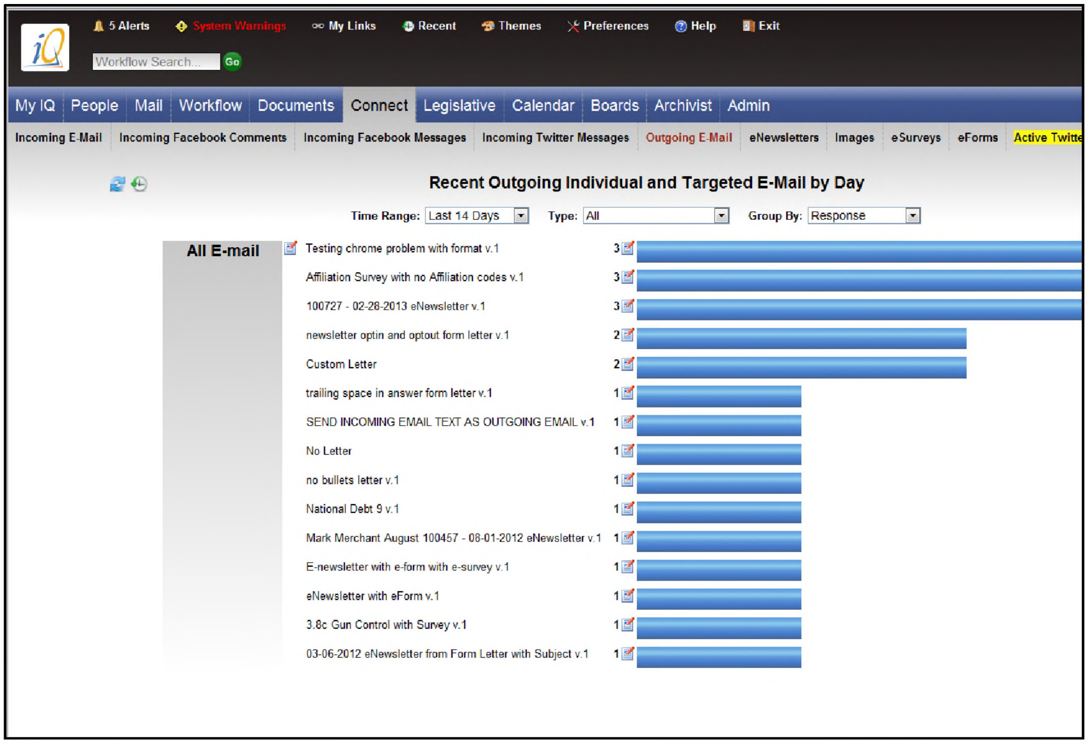
How to import and process Twitter Direct Messages:

1. **Click the Connect module tab and select Incoming Twitter Messages.**
2. **Select the Import action. IQ will prompt you to log into the Twitter account which contains the messages you would like to import into IQ.**
3. **IQ will display the Import Messages Data from Twitter dialog with a count of the number of messages imported. IQ will close the dialog once the import is complete.**
4. **Imported messages will appear in the All Queues view with a *Remove* and *Search* or *Reply* link.**

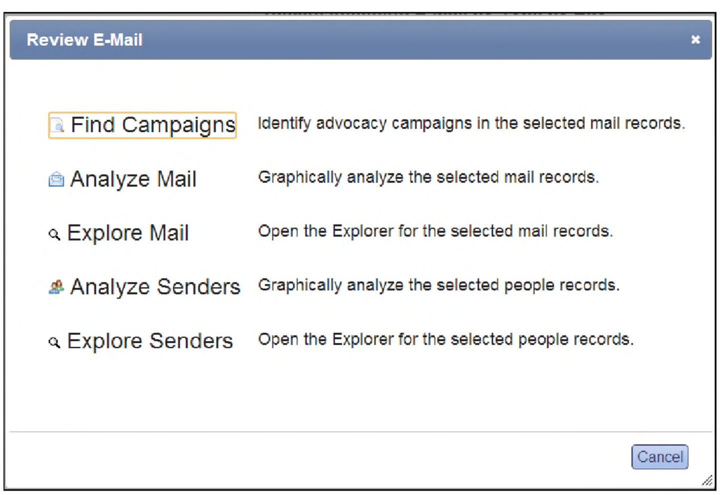
- **Select the Remove link to move the message from the All Queues view to the Removed view.**
- **Select the Search link to search for an IQ People record. IQ displays the People Search Results with records that contain the same First and Last Name. If you find a match, select the checkbox next to the record and select the Add Mail action. If you do not find an existing People record, select the Add Person action. IQ displays the New Person record page with the First and Last Name. Select the Add Mail action to create a Mail record for the incoming Twitter message and create an outgoing reply. (See the following for details).**
- **Select the Reply link to create a Mail record for the incoming Twitter message and create an outgoing reply. IQ attaches the incoming Twitter message to the Mail record. Select the Send Twitter DM action to open a dialog where you can type the reply message. Click the Send Message button when you are ready to send the Twitter reply message. Note: IQ will prompt you to log into Twitter, if you are not already logged in as the Twitter administrator. The completed Twitter message will appear in the Completed view.**

Outgoing Email

IQ Connect allows you to analyze outgoing and targeted emails by day for the past 14 days, 12 weeks, or 12 months. You can view all emails, just targeted emails, or just individual emails, and group by Response, Issue Codes, Email Subject, or Date Out. The criteria chosen for viewing Outgoing email are "remembered" for the user, until changed by the user. The settings are sticky even after logging out and back in.



You are able to select mass actions to perform on selected email subsets by clicking the Edit icon.

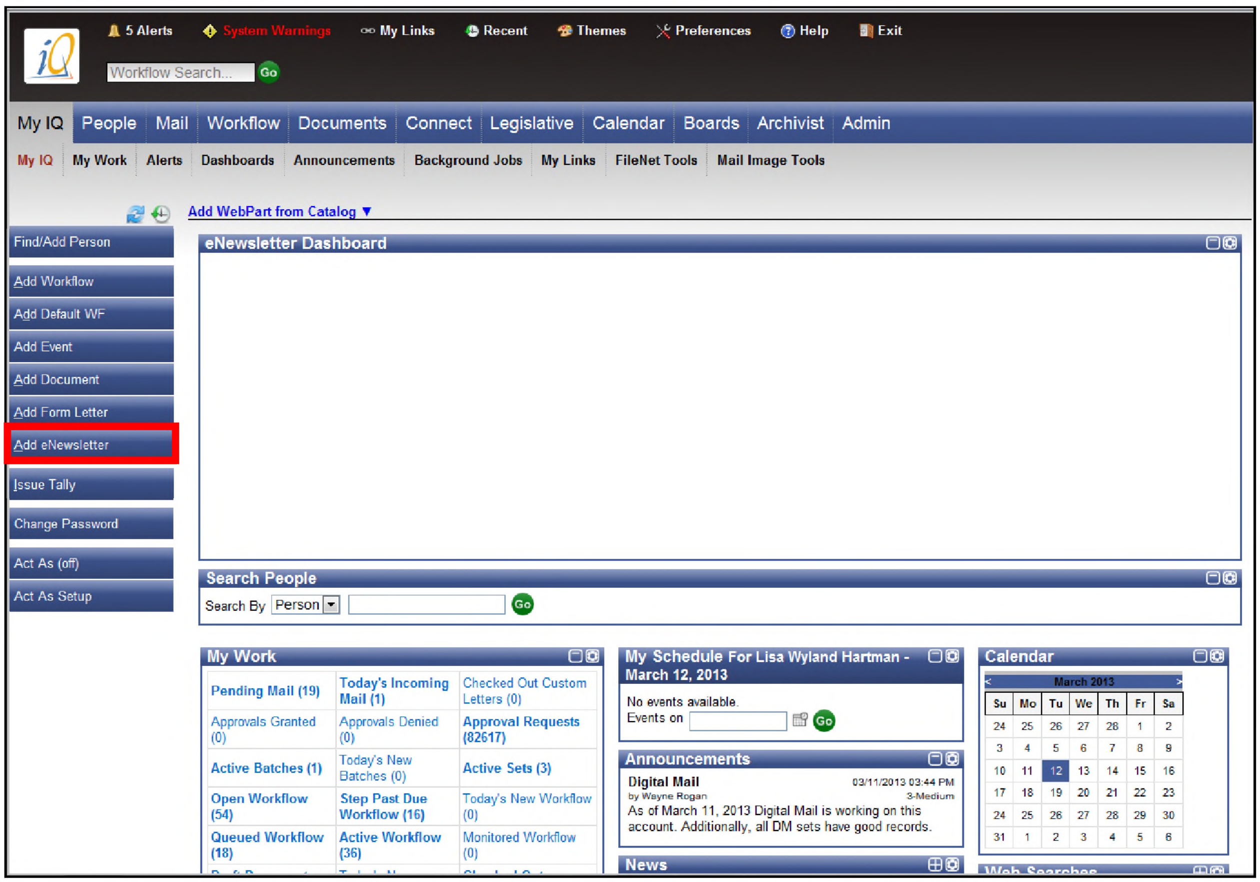


eNewsletters

There are four steps to creating an eNewsletter:

- Select a format
- Edit the content
- Select the audience
- Build and Send the eNewsletter

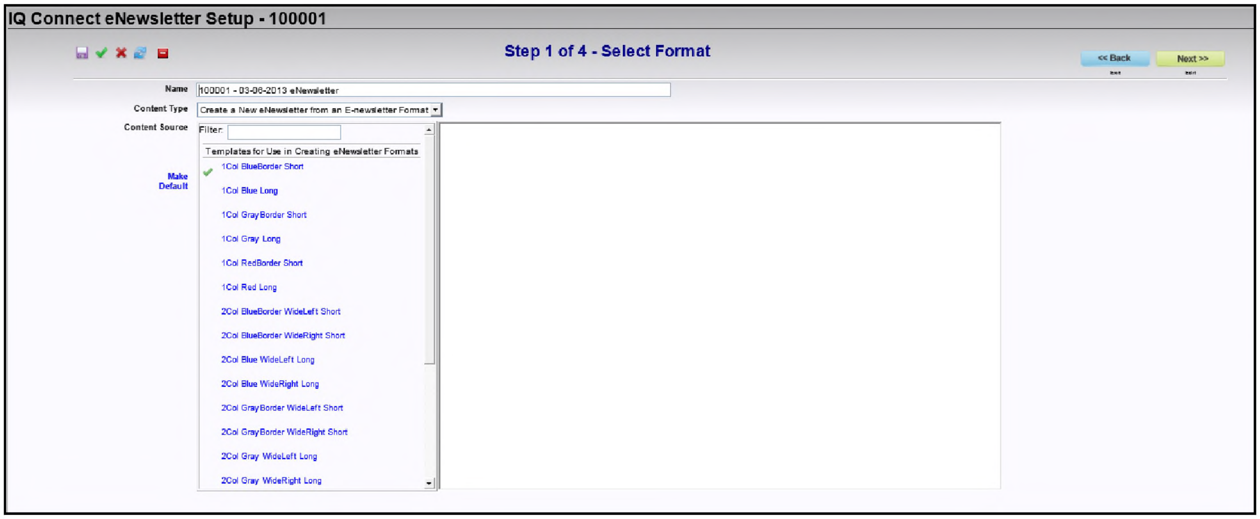
To begin creating an eNewsletter, select **Create eNewsletter** from the Actions Menu on the My IQ page.



Select Format

The first step to creating an eNewsletter is to name the newsletter and select the format.

A default eNewsletter name will appear in the name field. You may change this default name to one that is more descriptive. To change the name, highlight the default name, use the Backspace key to clear the field, and type the new name.



In the *Content Type* field, select whether to begin a new eNewsletter using a blank format, whether to reuse an existing eNewsletter, or whether to customize an existing eNewsletter.

Create a New eNewsletter from an eNewsletter Format

This option allows you begin from a blank format, into which you will enter all content and images. If you select this option in the *Content Type* field, a list of formats will appear in the column to the left of the viewing pane. Click each format to view its appearance. If there is a format you would like to use by default, select it and click the **Make Default** action to the left of the list of formats.

Reuse an Existing eNewsletter

This option allows you to use an eNewsletter you have previously sent, editing the content for your current newsletter. This is useful if you are merely updating some of the content, but wish to leave most of the rest of the format and some of the content in place. If you choose the option to reuse an existing eNewsletter, the From email address and Subject of the selected eNewsletter will NOT appear in the wizard and will NOT be reused. You can enter a new subject or leave the Subject field blank to use the office default. The default From email address will be used or you can select another email address, if your user-ID has been granted access rights to choose another From email address.

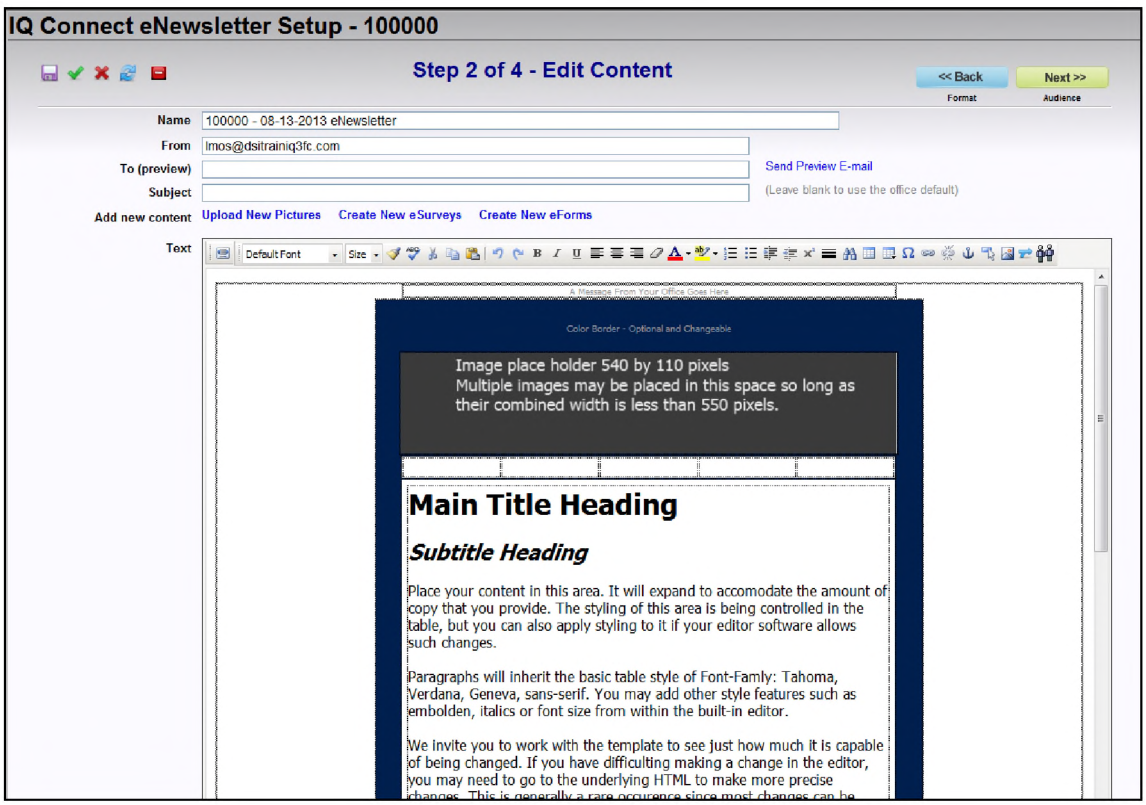
Customize an Existing eNewsletter

This option allows you to begin with an existing eNewsletter, but customize it further for your current use.

Below the list of formats is a list of templates you can use to begin creating an eNewsletter. To begin from a template, select the template and click the **Next (Edit)** button to edit the content.

Edit Content

You can edit the name of your eNewsletter in any step of the process. In the **Edit Content** page, the **From** field displays the default email address that is configured in your IQ System Configuration settings. If your IQ user ID has been granted access to change the From email address and your IQ System Settings are configured for additional From email addresses, you may click the drop down menu and select another email address in the list. To preview this eNewsletter, enter your email address in the **To (preview)** field. This allows you to view the eNewsletter in your own email client to be sure it displays correctly. If you want to preview the eNewsletter in multiple email clients before sending, (a recommended practice) you may enter multiple email addresses in this field by separating them with a semi-colon. The email addresses you enter will appear each time you create or edit an eNewsletter. To send preview emails, enter all email addresses in this field, then click the **Send Preview Email** link to the right of the field. Check your email accounts to view the eNewsletters.



> **Note:** You should preview the eNewsletter in several of the most commonly used email clients, such as Outlook, gmail, hotmail, etc. to be sure the content is displayed correctly.

The **Subject** field allows you to enter the subject that will appear when sending this eNewsletter. If you leave this field blank, IQ will use the office default subject line entered in your IQ System Configuration Settings.

To add new content to this eNewsletter, you can use the following options:

Enter Text

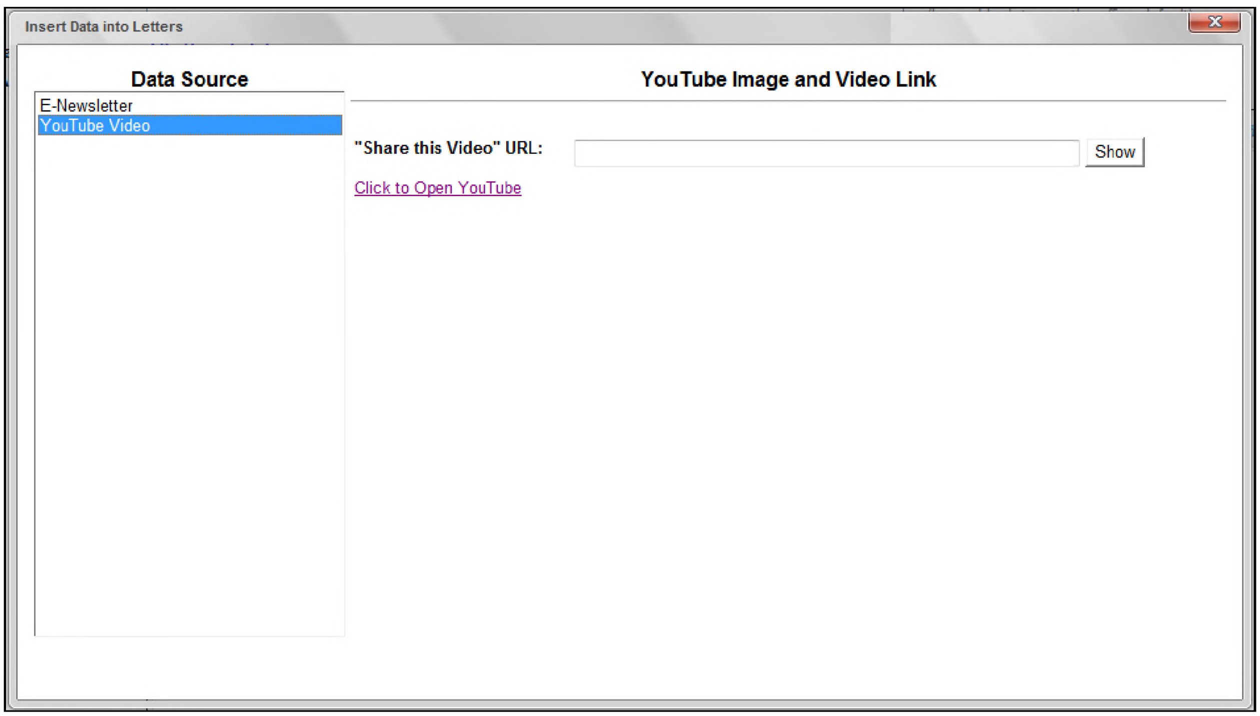
You may enter text in the body of the eNewsletter, and any other text field that you choose. For best results, type the text directly into the HTML editor. This ensures that all text in the eNewsletter will be properly displayed when viewed in most email clients. If your content already exists in Microsoft Word and you wish to copy and paste it into the eNewsletter, it is recommended that you copy the content into Notepad or WordPad first to strip out the Microsoft Word formatting, then copy that text into the newsletter. It is not unusual for Microsoft Word formatting to react unpredictably when sent through email.

Note: The list of available merge codes contains both eNewsletter and non-eNewsletter merge codes. If you use non-eNewsletter merge codes, it will increase the time it takes to process the eNewsletter. In addition, some merge codes, such as fill-ins and workflow UDFs, do not apply to eNewsletters unless it is sent from a workflow record

Add YouTube Videos

In the HTML editor for Form Letter Content and eFormat, Custom Letter Content and eFormat there is an additional data source called “YouTube Videos” that you can access using the “Merge Data” button.

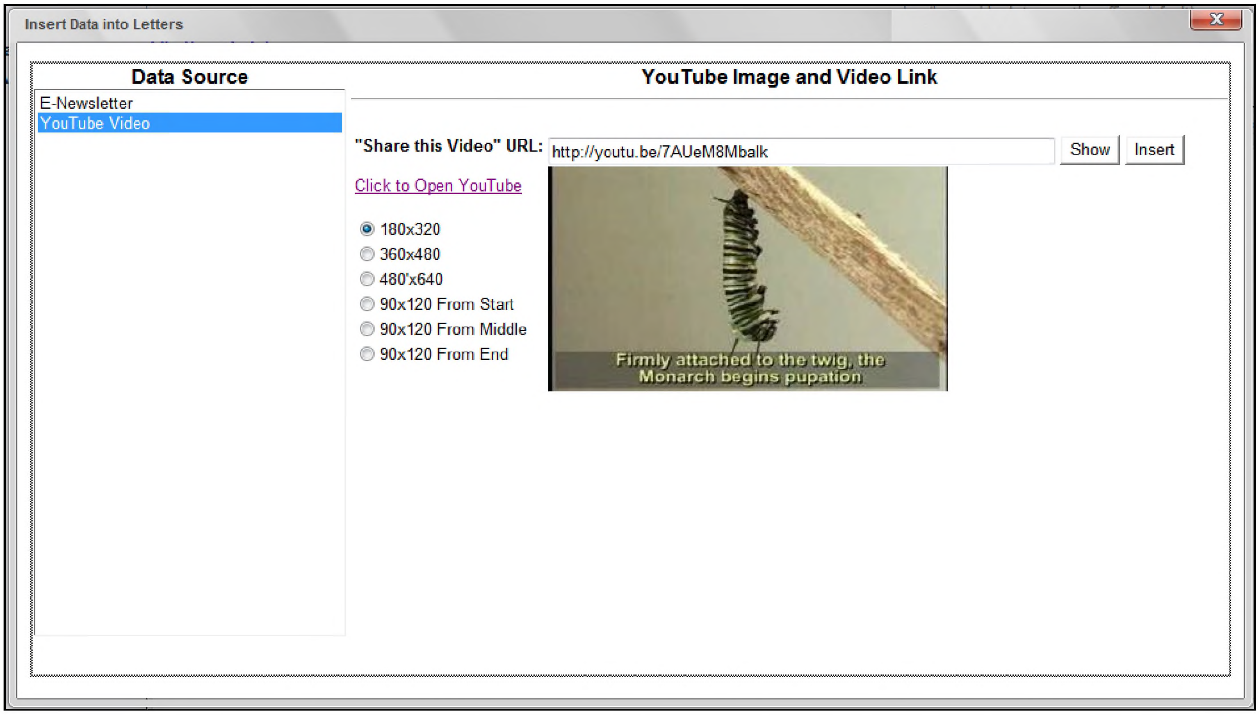
The screen changes to prompt for a YouTube video URL when you select the YouTube Video data source.



To locate the video on YouTube, select the “Click to Open YouTube” link. Search YouTube for the video and open when you find it.

Click “Share”, and copy the URL that appears in the “Share This Video” section.

When you enter a valid URL and click the SHOW button, IQ offers several options that allow you to change the size of the image that will serve as the hyperlink to launch the YouTube video.



When you click the Insert button, the image is added to the content or eFormat as a hyperlinked image tag.

If this was the wrong image or size, the best option is to delete it and reinsert the correct image and size. If this image is correct but in the wrong place, you can cut and paste it elsewhere.

In an email, this image will appear as an IQ Connect click tracked hyperlink. In a printed letter (if the video is added to content) this image will appear as an imbedded image in the word document.

Upload New Pictures

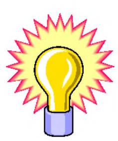
This option allows you to locate image files from your computer, a shared drive, or from the IQ Document library. If you have a local scanner, you may also scan an image directly into the eNewsletter by using the Scan option.

When you upload a new image from your workstation or shared drive, you will attach the image to your eNewsletter, as well as store it in the document directory. The document name will default to your image file name; however, you can change it to something more descriptive if you wish. The document name cannot contain spaces or special characters.

Select an appropriate directory for saving your image files, and select **Add**. Some versions of IQ may require you to change the Status of the document to Approved before it will be available in the Image Gallery.

To include images located in the IQ Document Directory, select the image icon located in the HTML Editor Toolbar.

If you wish to wrap text around the image, double click the image and use the "Alignment" option. A left justification will wrap the text around the right side. A right justification will wrap the text around the left.



Note: If the image you select is too large, it is a best practice to resize the image BEFORE you upload it to IQ. This reduces the size of the image file. If you upload a large image to IQ and reduce the size in the eNewsletter, the file size is not reduced. Also, if you upload a correctly sized image, you will not need to adjust it if you use it again in the future.

Create New eForms

If your office has configured a web form distribution by email, you may use the same toolbar option as the eSurveys in order to select the web form for inclusion in your eNewsletter. You can use Web Forms to generate mail to your office or to open new Workflow records.

Create New eSurveys

To create and attach a new eSurvey, click the **Create New eSurveys** link. Clicking this link will allow you to build an eSurvey that you can link to an eNewsletter once you publish it. If you have already created an eSurvey and would like to include it in your eNewsletter, select it by opening the people icon located in the HTML Editor Toolbar.

This will allow you to select existing eSurveys and eForms for inclusion. One common use of eSurveys is to include a survey question "Would you like to subscribe to our eNewsletter?". This can be attached to Subscribe/Unsubscribe Affiliation codes. eSurveys are described in a later chapter in this document.

When you are finished editing the content of your eNewsletter, select the **Next (Audience)** button at the top of the page.

Select Audience

On this page, you will determine the audience for your eNewsletter.

All people with a valid e-mail address

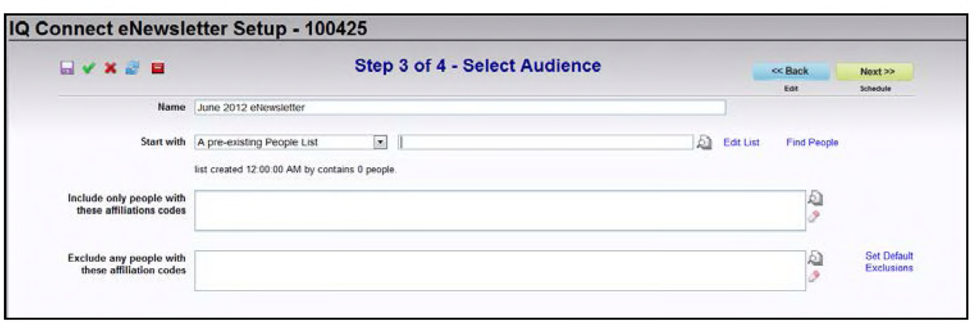
You can begin to create your eNewsletter by selecting all people with a valid email address, which is the default option. This will locate only those People records in the database that have a valid email address. You can further filter the People records by including only those with a particular Affiliation code, for example, SUBSCRIBE. You can also exclude People records based on an Affiliation code in their People record (for example, UNSUBSCRIBE, DECEASED, or DO NOT MAIL).

To the right of the **Exclude any people with these affiliation codes** field, you will see a link that allows you to **Set Default Exclusions**. Once you have populated the **Exclude any people with these affiliation codes** field, clicking this link will default these exclusions each time you create a new eNewsletter.

A common use of Affiliation codes is to use the Opt-in and Opt-out codes to include and exclude only those people that wish to opt in to the eNewsletter.

A pre-existing People List

Another option for selecting an audience is to use a pre-existing List.



Using this option, you may select a list of People records created previously based on multiple select criteria. People lists may include filters of all sorts.

Create a New People List

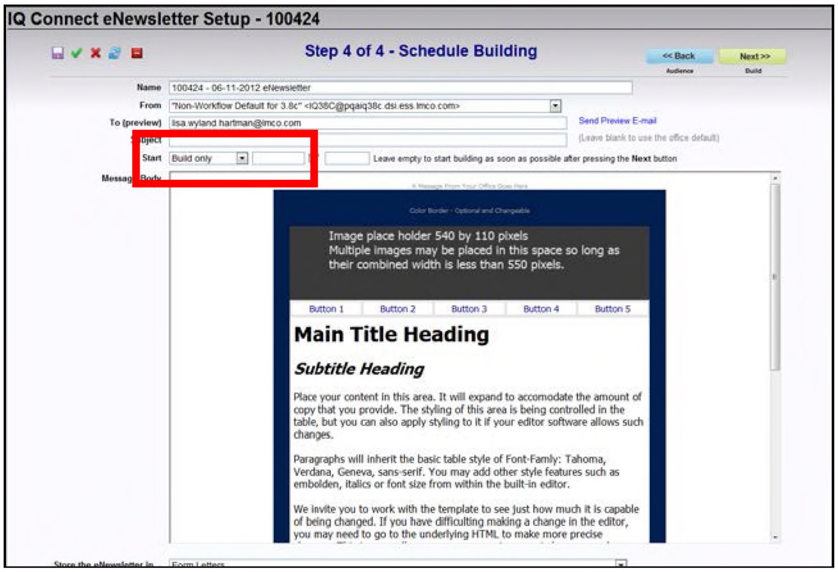
If you want to create a new People list, click the **Find People** link. This will open a new People List record, which allows you to select the criteria for your eNewsletter mailing.

Note: It is recommended that you take an IQ Lists class before setting up a People List.

Once you have finished selecting your audience, use the **Next (Schedule)** button at the upper right corner of the page to go to the next step.

Schedule Building

In this step, you have the opportunity to check the name, the **From** address and subject line for your outgoing eNewsletter. You may also send one or more preview emails to be sure the eNewsletter will display properly when emailed. You will see any surveys or web forms attached to this eNewsletter if you added them to your mailing.



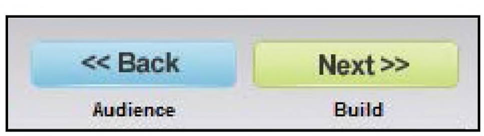
When you are ready to begin building and sending your emails, determine whether you will **Build Only** or **Build and Send**.

Build Only will create a targeted mail record for your list, but will not send the eNewsletter. You will need to log back in to send the eNewsletter at a future time. Building the mailing takes system resources, so if you have a large mailing, it may be a good idea to schedule building this eNewsletter at a time when fewer users are in the system. You can schedule the date and time to build this mailing.

Build and Send will build the mailing and send it out as soon as building is complete. You may also schedule a date and time for the build and send process if you would prefer to use the system resources at a time when most users are off line.

If you choose Build and Send and do not select a date and time for the background job, the eNewsletter will be immediately submitted for sending and no further edits can be made.

When you are ready to monitor your eNewsletter, select the **Next (Build)** button at the upper right corner of the page.



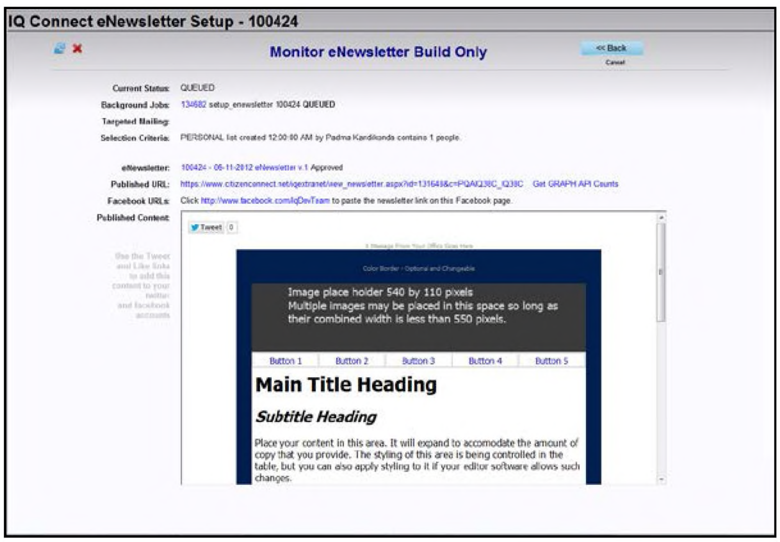
Monitor eNewsletter

In the **Monitor eNewsletter** page, you will see the status of the eNewsletter.

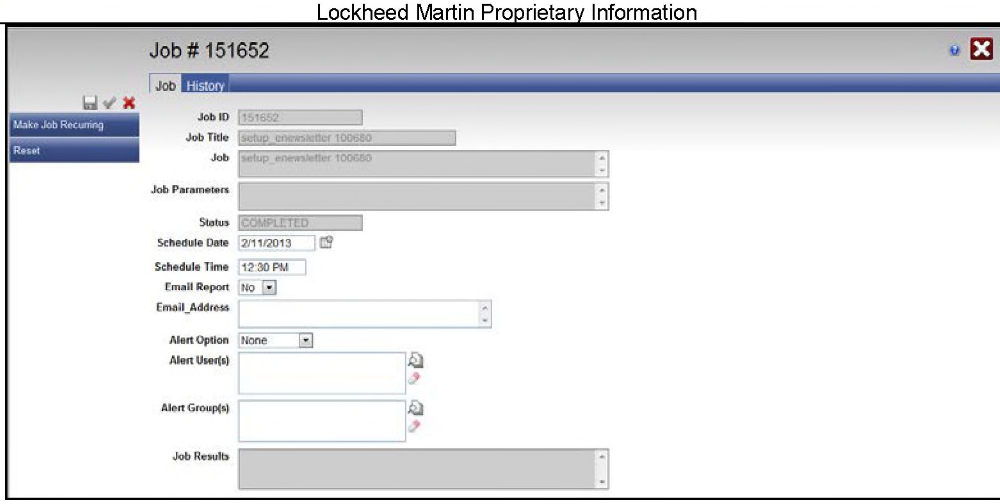
If you have just opened this page, you will see the Current Status listed as QUEUED. This indicates that the eNewsletter is queued and waiting for the scheduled background job to begin that will build the targeted mailing.

If your eNewsletter targeted mail record has already been built but not sent, the Current Status is BUILT.

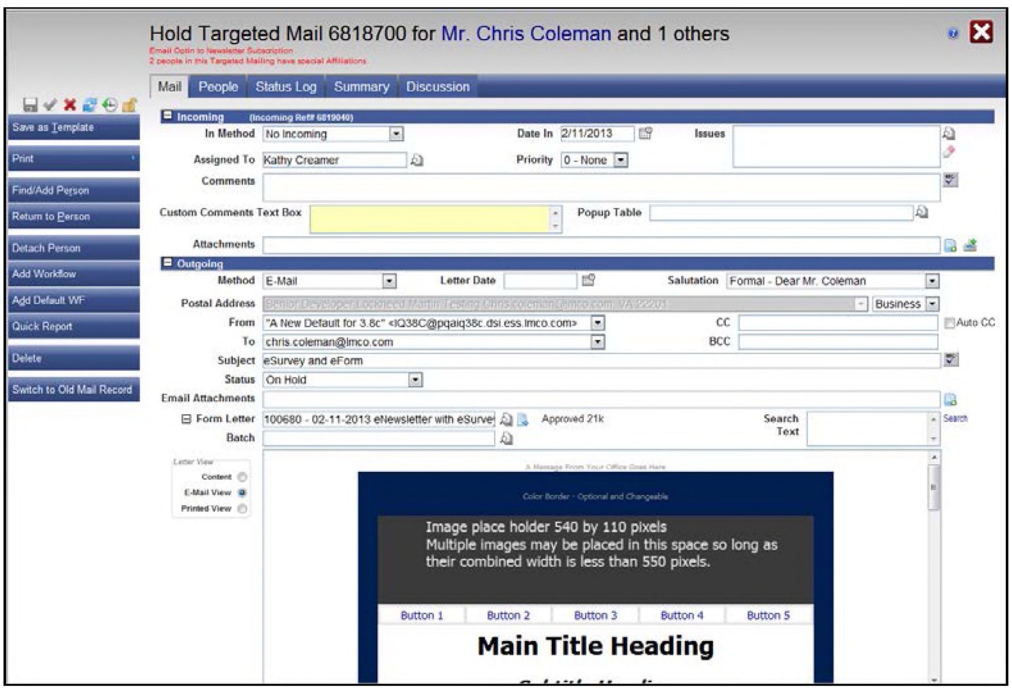
If an eNewsletter has been sent, the Current Status will indicate that the eNewsletter is FINISHED. In this case, the mailing is complete.



IQ creates a Background Job to build or build and send an eNewsletter. If you would like to view the background job associated with this eNewsletter, click the link indicating the number of the Background Job. You will be able to view and edit this background job. For more information regarding Background Jobs, see the IQ System Administration Training Guide.



If you would like to edit the Document record associated with the eNewsletter, click the document record link in the e**Newsletter** field.



You will be able to add Document Codes, Issue Codes, enter Review or Expired Dates as well as apply any other Document record function to this eNewsletter. For more information on handling Document records, see the IQ Documents Training Guide.

The Published URL opens the eNewsletter in a separate browser window. If your office has configured access, you will be able to send a link to this eNewsletter as a Twitter Tweet, or Like it on Facebook to distribute the eNewsletter as a Facebook post. You can also use the Send button to send this eNewsletter to specific friends on Facebook if you choose.

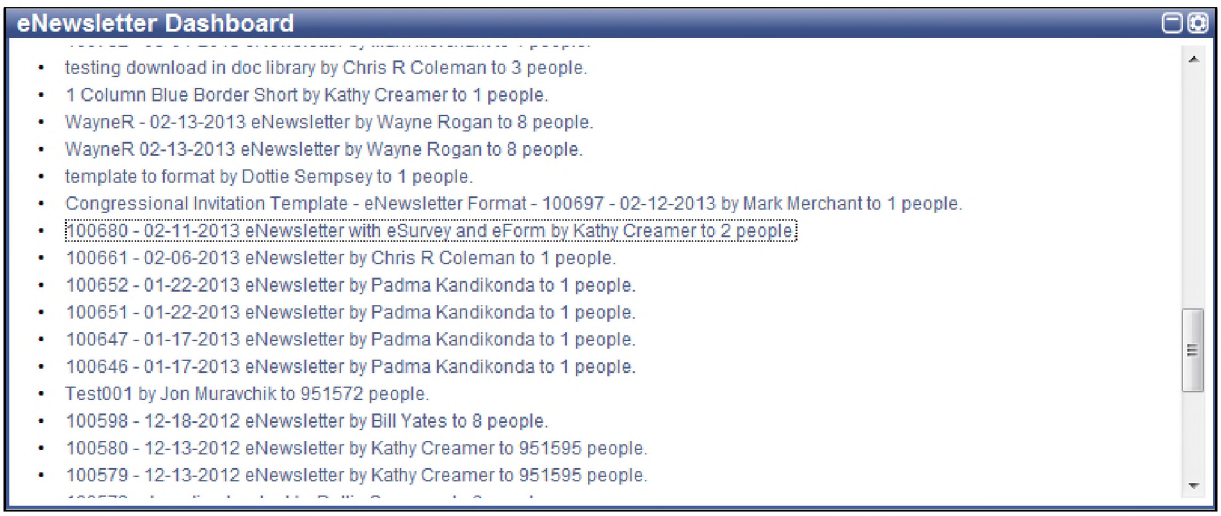
You can also click the Facebook URL to copy the link in order to paste it into a Facebook page. This option allows you to post the link on Facebook embedded in a longer post if you wish.

Once posted, you are able to track interaction with your eNewsletter using the **Get GRAPH API Counts** link. This link opens a separate browser window listing statistics from Facebook indicating how many times your eNewsletter was viewed, liked, shared, and commented on Facebook.


```xml
<?xml version="1.0" encoding="UTF-8"?>
- <links_getStats_response list="true" xsi:schemaLocation="http://api.facebook.com/1.0/ http://api.facebook.com/1.0/facebook.xsd"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns="http://api.facebook.com/1.0/">
  - <link_stat>
      <url>https://www.citizenconnect.net/iqextranet/view_newsletter.aspx?id=131622&c=PQAIQ38C_IQ38C</url>
      <normalized_url>https://www.citizenconnect.net/iqextranet/view_newsletter.aspx?id=131622&c=PQAIQ38C_IQ38C</normalized_url>
      <share_count>2</share_count>
      <like_count>1</like_count>
      <comment_count>0</comment_count>
      <total_count>3</total_count>
      <click_count>0</click_count>
      <comments_fbid>10150921131217225</comments_fbid>
      <commentsbox_count>0</commentsbox_count>
    </link_stat>
</links_getStats_response>
```


eNewsletter Dashboard

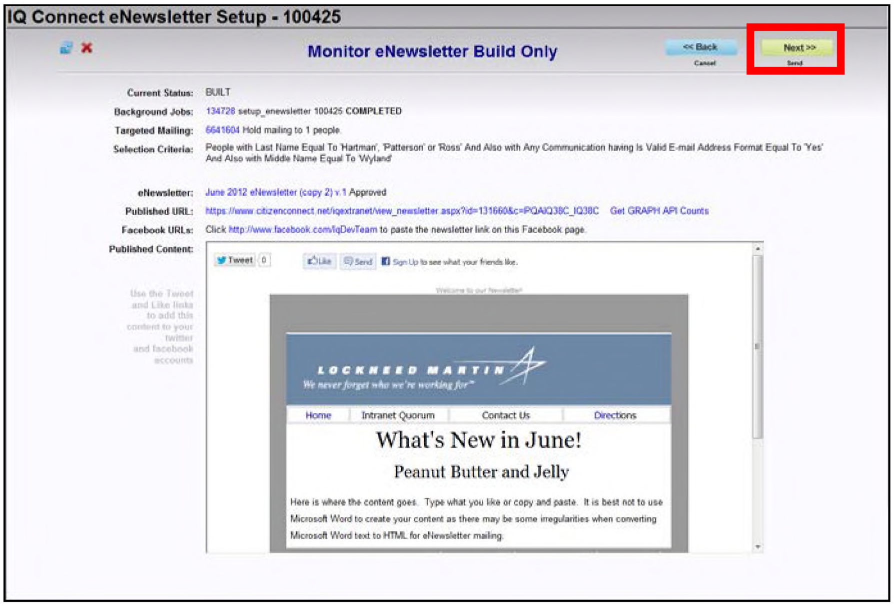
If you want to view information about all of the eNewsletters that you or other IQ users have created or sent from IQ, you will use the eNewsletter Dashboard Web Part on your My IQ page.



Use the link at the top of the Web Part to create a new eNewsletter. You will also see a list of eNewsletters grouped by Current Status. The eNewsletters that are **Under Construction** have not yet been scheduled for build. These newsletters are open for editing.

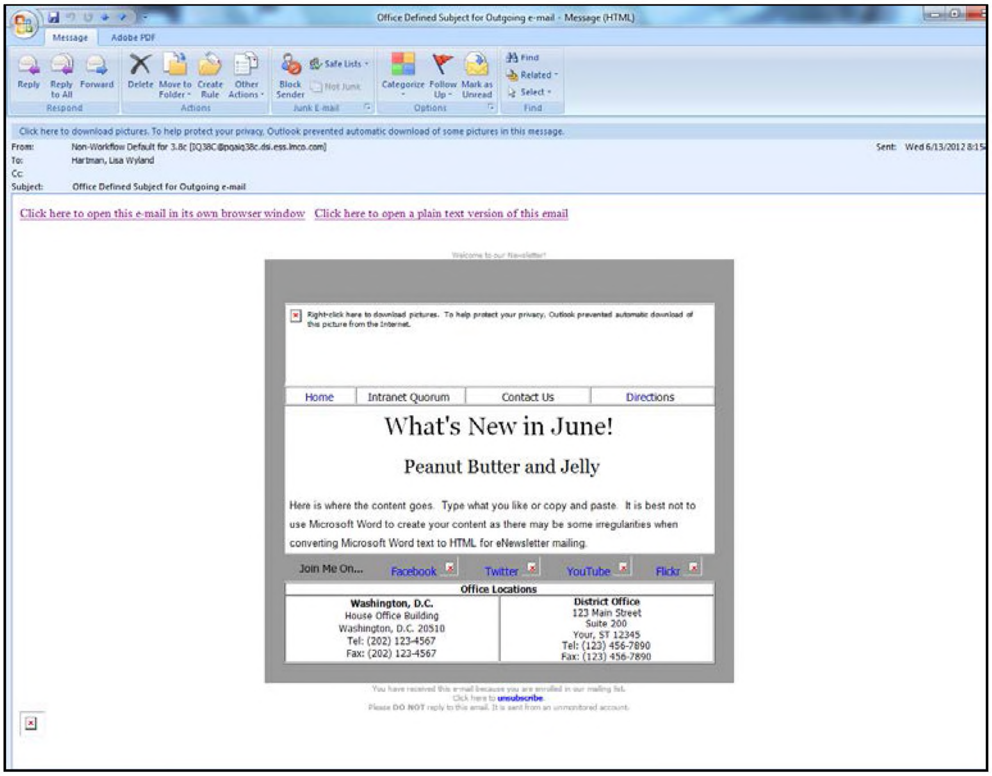
eNewsletters that are **Queued for Background Processing** are configured to be built and sent, however the background process to create the mailing is not yet complete.

eNewsletters listed in the **Requires Confirmation before Sending** section have been built but not sent. These eNewsletters have been built, and can be sent by opening the eNewsletter record and clicking the **Next (Send)** button.



Once you have clicked **Send,** the Current Status will change to **Sending** and finally to **Finished** once all eNewsletters are sent.

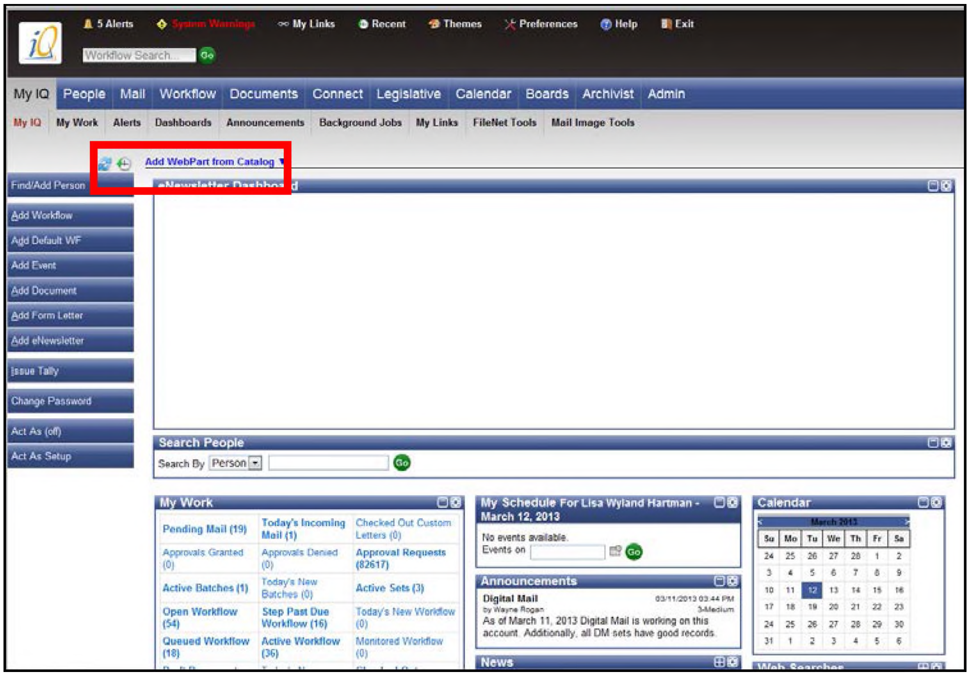
An eNewsletter received in Microsoft Outlook looks like this:



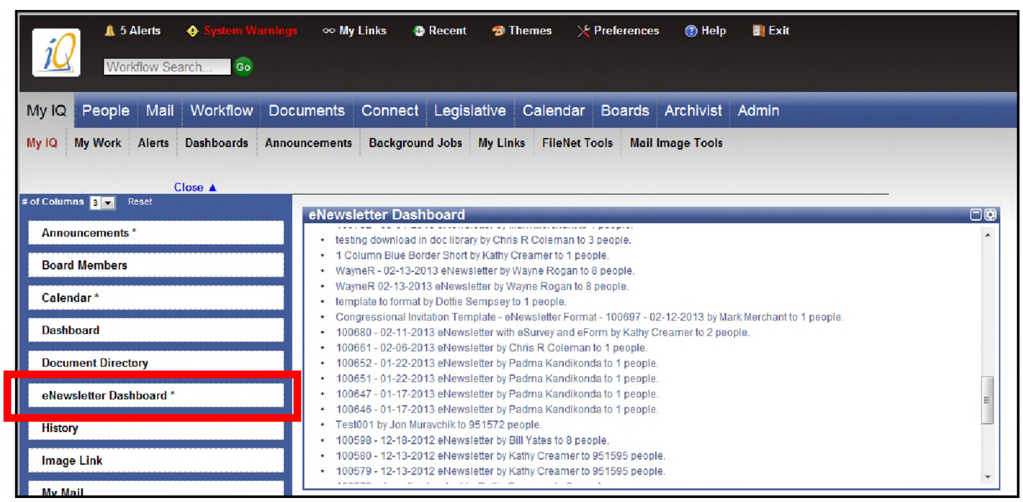
Note: When the eNewsletter appears in an email, a link "Click here to open a plain text version of this email" will appear at the top of the eNewsletter.

Adding the eNewsletter Dashboard Web Part

If you wish to access all eNewsletters from the My IQ page, you may add the eNewsletter Dashboard Web Part if it has not already been added. To do this, click the **Add Web Part from Catalog** link at the top of the My IQ page.



This will open a list of Web Parts that you may add to your My IQ page.



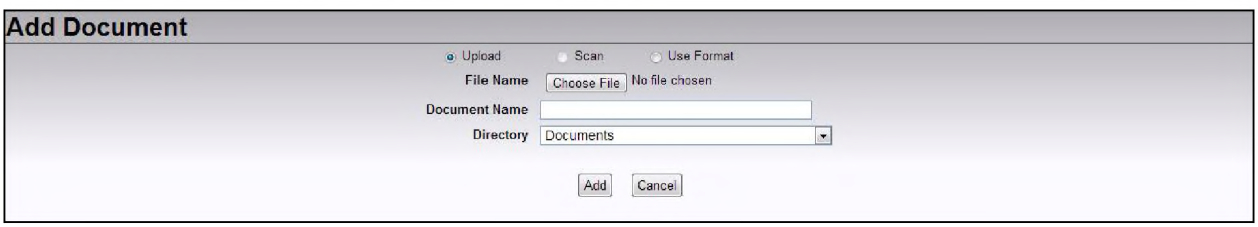
To select the eNewsletter Dashboard Web Part, click and drag it to the My IQ page. When you drop the web part, it will appear on the page in the position you selected.

You will only need to add this Web Part one time – once you've added it to your My IQ page, it will appear each time you open the page.

Images

IQ Connect provides an Image library. From this library, you may upload new images for use in eNewsletters, eSurveys, and Web Forms. When you open the Images panel, all images are displayed by default in ascending name order. You can use the Search For field to locate a particular image if you like.

If you wish to upload a new image for use in IQ Connect, click the New Image action on the Actions Menu. The Add Document page will open.



You can upload an image file from your workstation or shared drive by selecting Upload, or you can scan an image if you have a local scanner.

To upload a file, click the Choose File button to search your workstation or shared drive for the image you wish. The file name is the default entry in the Document Name field, however you can change it if you wish. Select the Directory to which you wish to add this image and click Add.

Images that you upload to IQ Connect are automatically exported to the Extranet, making them available for use in eNewsletters, eSurveys and Web Forms.

Creating an eSurvey

IQ provides the ability to create eSurveys that are linked to a form letter, such as an eNewsletter. Surveys can be embedded within an eNewsletter or accessed in a separate browser window by clicking a link in the eNewsletter. You can also email a survey without any form letter text, by simply linking the eSurvey to an empty form letter.

Your IQ user ID must have access to Documents Lock #230 – Create and Modify your own eSurveys in order to create an eSurvey.

How to create an eSurvey:

1. Click the Documents tab and click the eSurvey submenu link.
2. Select the Add Survey action. IQ displays the eSurvey Builder record page.
3. Type the name of the new eSurvey (up to 48 characters) in the Name field on the General panel.
4. Click the Survey Questions tab and select the Add Question action.
5. Complete the fields on the Survey Questions panel for each set of questions and answers.
6. Complete the fields on the Survey Cosmetics panel for each set of questions and answers.
7. If you would like to add HTML formatting to the eSurvey for recipients who click the link to open the eSurvey in a new browser window, click the Linked Survey tab.
8. Select the Save and Close action to save the new eSurvey and close the record.

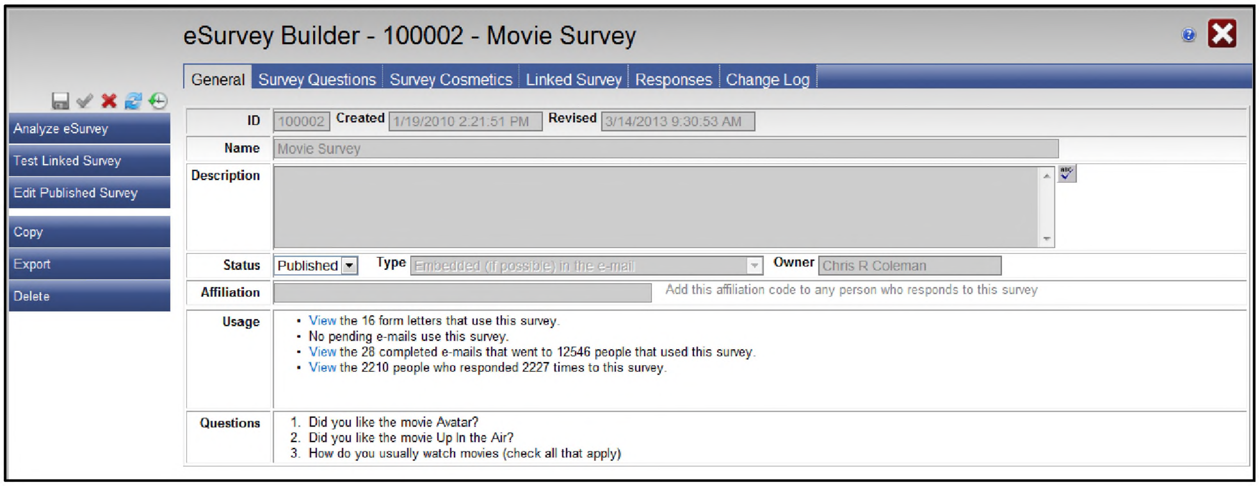
How to link the eSurvey to an existing form letter:

1. Search for the existing form letter.
2. Click the letter name link to go to the Form Letter record page and click the eFormat tab.
3. Position your mouse where you would like to insert the eSurvey. Typically, this would be after the [[$$$LetterText$$$]] merge field if you are including the eSurvey as part of the form letter text.
4. Click the eSurvey Merge Fields icon  in the tool bar. IQ displays the Select eSurvey dialog with a list of available eSurveys. Highlight an eSurvey name by clicking it. IQ displays the eSurvey ID, Status, Usage and Questions on the right hand side. Click the Submit button.
5. IQ places the merge field [[$$$Survey.<ID #>$$$]], in the form letter. Note that <ID #> is the survey ID number for the selected survey.
6. Select the Save and Close action to save and close the Form Letter record page.
7. You can now email the form letter with the eSurvey to selected people.

It is important to remember that when you look at the Text tab of the **Form Letter** record page, you do not see the email representation of the letter and so you will not see an attached survey or images if they have been attached on the **EFormat** tab. To see the eSurvey and all images as they would appear in the email, you will need to use the **Preview Emai**l action on the record page. Preview Email will display the survey and post any responses you have entered for testing purposes, however since the Preview Email is a test function, any responses will not be included in the actual survey results.

eSurvey Record Page

The **eSurvey Record Page** contains all information about the survey and appears when you add a new eSurvey or edit an existing one. The title of the page shows the eSurvey ID along with the survey name. The record page contains panels that let you enter information about an eSurvey, define its content and appearance, and view the responses. To access one of the following panels, click the appropriate tab: **General, Survey Questions, Survey Cosmetics, Linked Survey, Responses** and **Change Log.**



Your IQ user ID must have access to Documents Lock #230 – Create and Modify your own eSurveys in order to create and modify your own eSurveys and Lock #229 -- Change any eSurvey regardless of who it was created by in order to edit eSurveys created by other users.

General

The **General** panel contains fields for entry of the survey name and description along with the status, type and owner. Information about the survey usage and questions is also displayed. Note that if the status is **Published**, access to the fields on this panel is restricted so that the information cannot be changed by anyone.

Fields on the **General** panel include: **ID, Created, Revised, Name, Description, Status, Type, Owner, Usage** and **Questions.** IQ automatically enters information in the **ID, Created** and **Revised** date fields and these fields cannot be edited.

Name

Type a name, up to 48 characters, for this eSurvey. This name appears in the title of the record page as well as the **Search Results** page.

Description

This optional field lets you enter information, up to 4000 characters, about the eSurvey you're creating. Information entered into this field is displayed in the **Description** column on the **Search Results** page. This is a text entry field, which means you can type and delete text in this field just as in a word processor. You can also spell-check text entered into this field by clicking the spell check icon next to the field.

Status

This field defaults to **Draft** when you create a new eSurvey. A status of Draft allows you to select the eSurvey in the **EFormat** panel in a Form Letter record page; however, you must change the status to **Publish** before the eSurvey can be sent. A Published survey is "read-only". To make changes to a Published survey, you must change the status to Draft. A Published survey must have at least one question, either a 'Redirect URL" or "Thank You Message" defined, and no two questions may have the same name.

> Your IQ user ID must have access to Documents Lock #228 -- Publish eSurveys to Extranet in order to change the status to Publish.

Type

This field defaults to **Embedded (if possible) in the email,** which allows the contents of the survey to be displayed inside the email depending on the recipient's email client. If the recipient's email client blocks embedded content, the recipient will still see the survey; however they will not be able to complete it unless they click the link to open the survey in a new browser window. Select **Always accessed via an email hyperlink**, if you do not want to display the contents of the survey in the outgoing email. This option requires all recipients to click a link to open the survey in a new window. When this option is selected, IQ uses the HTML that you enter on the **Linked Survey** panel to display the eSurvey.

Owner

This field defaults to your IQ user ID. Click the lookup icon if you would like to reassign ownership of this eSurvey to another IQ user.

Usage

This section of the **General** panel displays the usage counts for the number of form letters, pending and completed mail records that use this eSurvey along with the number of responses that have been recorded for this survey. In addition, you can click the view link to go to a listing of the form letters or mail records that contain this eSurvey as well as a list of People records that responded to the survey.

Questions

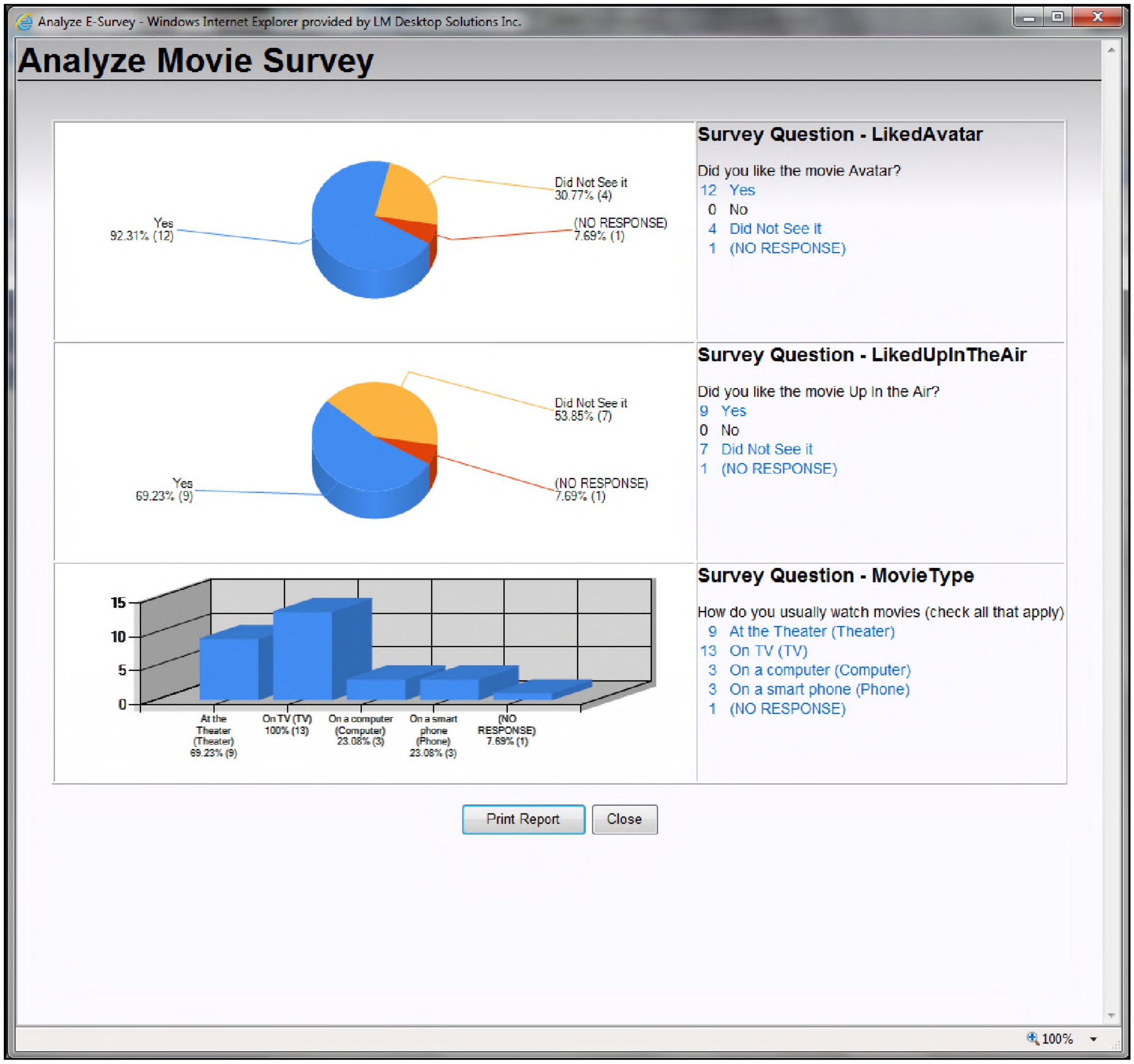
If questions have been defined for this eSurvey, IQ displays them here. A complete listing of the questions and their corresponding answers can be found on the **Survey Questions** panel.

Test Linked Survey

This Action Menu option will launch the survey in a separate browser window.

Analyze eSurvey

This Action Menu option will launch a summary report for the eSurvey or Town Hall meeting in a separate browser window. This action opens a pie or bar chart for responses to all Survey or Town Hall questions. There are also links to view the list of People for each response. You are able to print this report if you choose.



Copy

This Action Menu option allows you to copy any survey format to a new survey name. To do this, you must have at least the security to edit your own surveys.

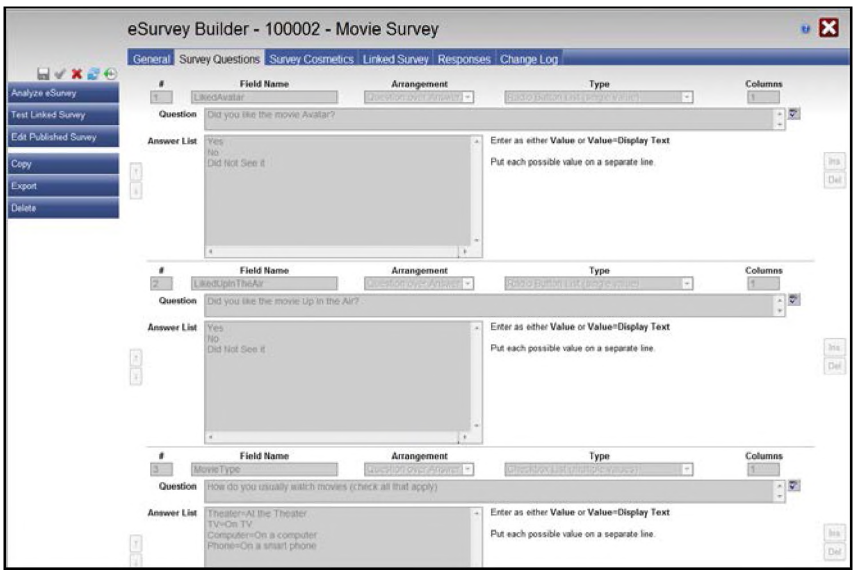
Delete

This Action Menu option will delete the survey.

Survey Questions

The **Survey Questions** panel contains the questions and answers for the survey. Each question contains a **Field Name, Type, Question** and **Answer List**. You can also select an arrangement for the display of the question and answers. To add a question to the bottom of the list, select the **Add Question** action. Select the **Ins** button to insert a new question above the current question. To delete a question, select the **Del** button located at the end of the question.

IQ will check for the following and display a message if any of these conditions exist: the eSurvey does not have any questions, the eSurvey has a question with no field name, the eSurvey has no answers for a question, eSurvey field names are not unique, or the eSurvey has a field name with no question or answers.



Field Name

Enter a unique field name for the question. The value entered here is stored in your IQ database and will eventually be used by the **eSurvey List Builder** to search for the survey question. This field may contain spaces.

Arrangement

This field defaults to **Question over Answer**, which will display the values you enter in the **Answer List** field below the question. Click in this field and select **Side by Side** if you would like the answer list to be displayed to the right of the question in the eSurvey.

Type

The **Type** field allows you to control the display of the **Answer List** field values as either single values (drop-down list or radio button list) or multiple values (checkboxes). In addition, you can identify the answer list values as **Affiliation Codes** by selecting one of the three options that begin with "Affiliation".

Columns

This field allows you to select the number of columns to display the answer list values in the eSurvey.

Question

Type the question that corresponds with the values entered in the **Answer List** field. You can include HTML format tags for bold , underline <u> </u>, or italic <i> </i>. The HTML formatting is displayed in the outgoing eSurvey as well as in the **eSurvey Record** page and **Search Results** page. You can also spell-check text entered into this field by clicking the spell check icon located to the right of this field.

Answer List

Type each answer on a separate line in the format **Value** or **Value=Display Value**. If you select one of the Affiliation options in the **Type** field, you can include a mix of Affiliation Codes and non-Affiliation Codes. In addition, you can change the display value to something that is more descriptive than the translation. For example, if your IQ database contains the Affiliation Code COC with a translation of Chamber of Commerce, it would appear in this field as COC=Chamber of Commerce and “Chamber of Commerce” would be displayed in the eSurvey. If, however, you would like “Chamber of Commerce Member” to appear in the eSurvey, you would simply add the word “Member” to “COC=Chamber of Commerce” as it appears in the Answer List field. IQ uses the Affiliation Code ID “COC” to update the recipient’s People Record in your IQ database. Affiliation based fields will cause the survey form to update the responder’s Affiliation code list as long as valid Affiliation Codes are used as answers.

Both the eSurvey and eForm support the removal of an Affiliation Code. This means they can be used for subscribe (i.e. add the affiliation code EMAIL.OPTIN) and unsubscribe (i.e. remove the EMAIL.OPTIN affiliation code).

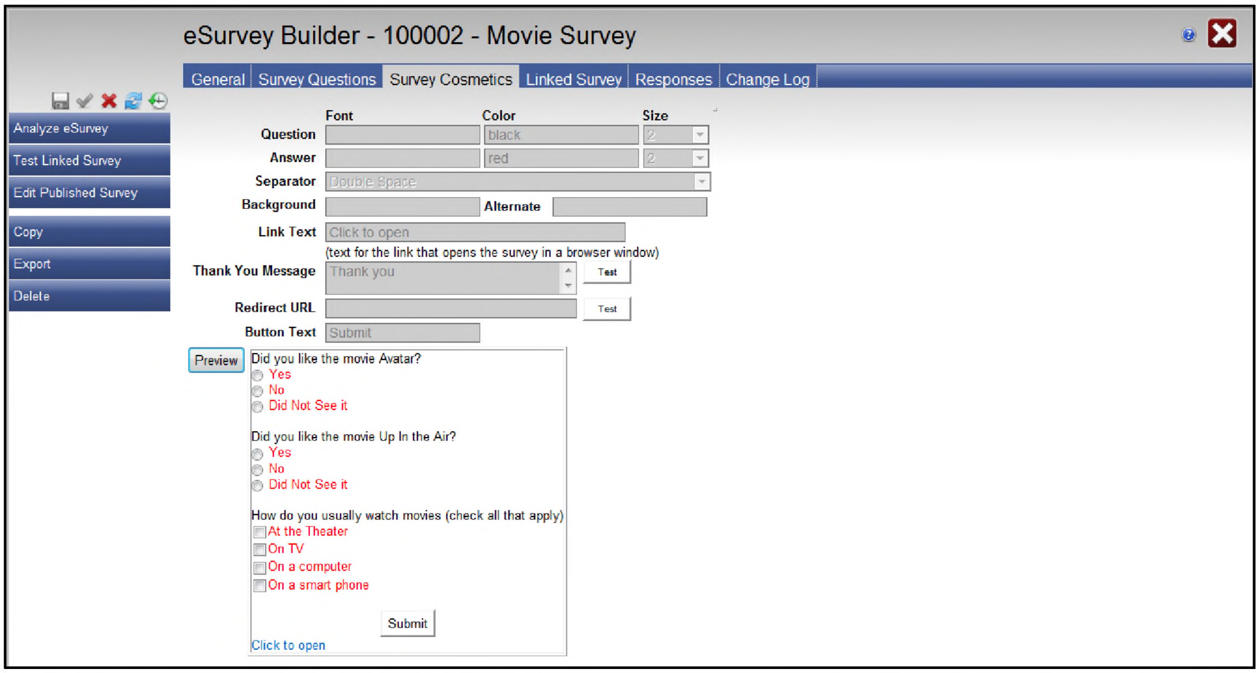
> You are not able to use HTML in the answers list. If the text of an eSurvey answer contains html, you will not be able to publish until the html (i.e. angle brackets < or >) have been removed.

A System Configuration setting allows customers to define a subset of affiliation codes that will not allow mail to be created or sent if the recipient has that code. The setting is found under Mail Configuration and is named "NO MAIL ALLOWED Affiliation codes. These codes will prevent mail from being created, printed or e-mailed."

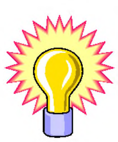
The field associated with this setting is a multi-valued affiliation code field. For those People records that contain a "NO MAIL ALLOWED" affiliation code, Mailings to those people will not be allowed.

Survey Cosmetics

The **Survey Cosmetics** panel allows you to select the color, font type and size for the display of the Question and Answers in the survey. In addition, you can select a separator, the background color and alternate background color for each question and answer group. When you click in the **Font** or **Color** fields for the **Question** or **Answer**, IQ displays a scrolling list of available fonts or colors. You can copy and paste a font or color from the list into the field or manually type it. The list of colors contains the color name along with its HTML color code. You can use either in the **Color, Background** or **Alternate** fields. Click the **Preview** button to view your color, separator and font selections.



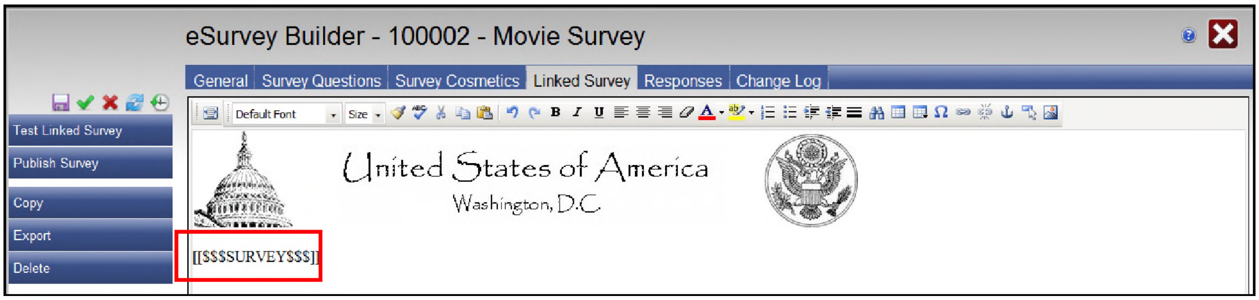
Click in the **Link Text** field and enter the text that you would like IQ to use for the link that opens the eSurvey in a new browser window. When the recipient submits the survey, IQ will display a pop-up message with the text that appears in the **Thank You Message** field. The button text for the "Submit" button can be changed in the **Button Text** field. You can then redirect the recipient to another website, by typing its URL in the **Redirect URL** field. Click the **Test** button to review the thank you message or redirect URL. If you have entered a valid redirect URL, IQ will open it in a new browser window.



You cannot publish this survey unless the **Thank You Message** or **Redirect URL** field is populated.

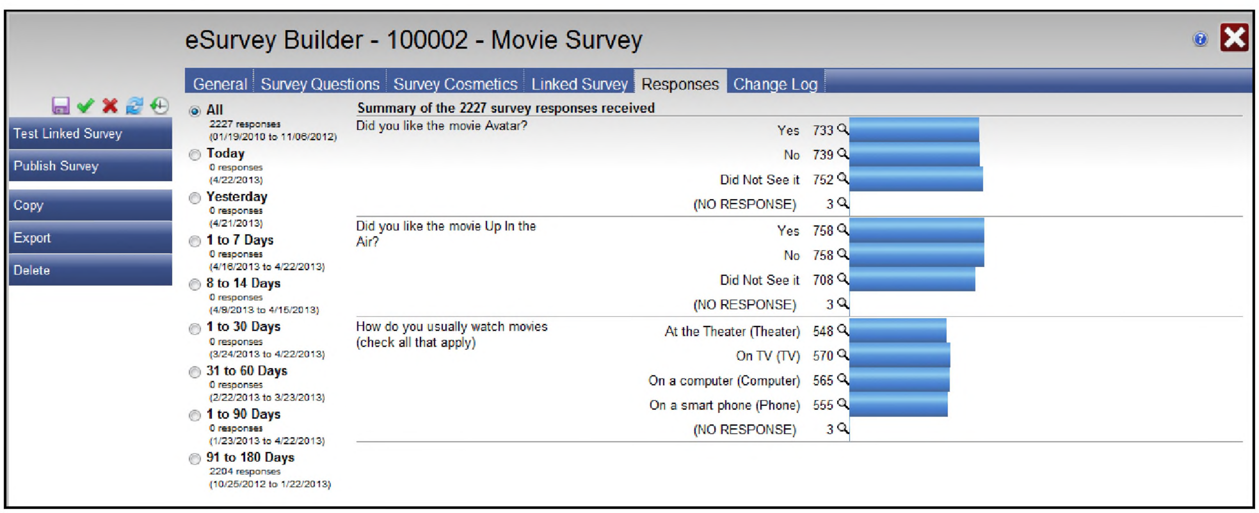
Linked Survey

The **Linked Survey** panel allows you to configure the eSurvey for display in a new browser window. This occurs when the recipient clicks the link to open the survey in a new browser window. To insert a new image, click the **Image Manager** icon in the tool bar, highlight the image file name and click the **Insert** button. Select the **Test Linked Survey** action to view the survey in a new browser window. Close the browser window when you have finished previewing the survey.



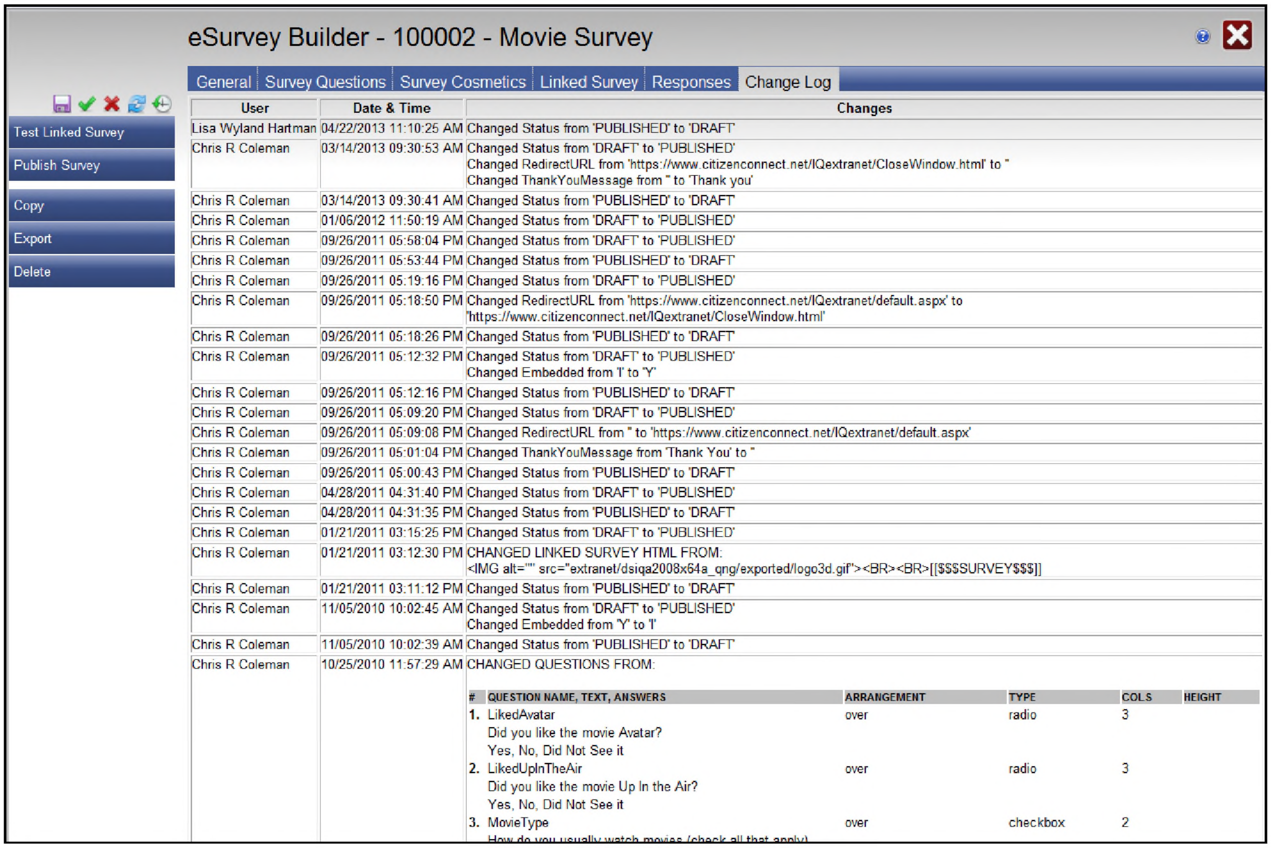
Responses

This panel displays a bar graph for the responses to each question. The number displayed next to each answer represents the number of responses for the associated question. If a recipient does not select a response for a question, the **(NO RESPONSE)** row will be updated. You can filter the responses by selecting one of the predefined date ranges on the left.



Change Log

The **Change Log** panel contains a history of changes made for this eSurvey record, including the user who performed the change, the date and time the change was made and a description of the change.



User	Date & Time	Changes
Lisa Wyland Hartman	04/22/2013 11:10:25 AM	Changed Status from 'PUBLISHED' to 'DRAFT'
Chris R Coleman	03/14/2013 09:30:53 AM	Changed Status from 'DRAFT' to 'PUBLISHED' Changed RedirectURL from 'https://www.citizenconnect.net/IQextranet/CloseWindow.html' to '' Changed ThankYouMessage from '' to 'Thank you'
Chris R Coleman	03/14/2013 09:30:41 AM	Changed Status from 'PUBLISHED' to 'DRAFT'
Chris R Coleman	01/06/2012 11:50:19 AM	Changed Status from 'DRAFT' to 'PUBLISHED'
Chris R Coleman	09/26/2011 05:58:04 PM	Changed Status from 'DRAFT' to 'PUBLISHED'
Chris R Coleman	09/26/2011 05:53:44 PM	Changed Status from 'PUBLISHED' to 'DRAFT'
Chris R Coleman	09/26/2011 05:19:16 PM	Changed Status from 'DRAFT' to 'PUBLISHED'
Chris R Coleman	09/26/2011 05:18:50 PM	Changed RedirectURL from 'https://www.citizenconnect.net/IQextranet/default.aspx' to 'https://www.citizenconnect.net/IQextranet/CloseWindow.html'
Chris R Coleman	09/26/2011 05:18:26 PM	Changed Status from 'PUBLISHED' to 'DRAFT'
Chris R Coleman	09/26/2011 05:12:32 PM	Changed Status from 'DRAFT' to 'PUBLISHED' Changed Embedded from 'I' to 'Y'
Chris R Coleman	09/26/2011 05:12:16 PM	Changed Status from 'PUBLISHED' to 'DRAFT'
Chris R Coleman	09/26/2011 05:09:20 PM	Changed Status from 'DRAFT' to 'PUBLISHED'
Chris R Coleman	09/26/2011 05:09:08 PM	Changed RedirectURL from '' to 'https://www.citizenconnect.net/IQextranet/default.aspx'
Chris R Coleman	09/26/2011 05:01:04 PM	Changed ThankYouMessage from 'Thank You' to ''
Chris R Coleman	09/26/2011 05:00:43 PM	Changed Status from 'PUBLISHED' to 'DRAFT'
Chris R Coleman	04/28/2011 04:31:40 PM	Changed Status from 'DRAFT' to 'PUBLISHED'
Chris R Coleman	04/28/2011 04:31:35 PM	Changed Status from 'PUBLISHED' to 'DRAFT'
Chris R Coleman	01/21/2011 03:15:25 PM	Changed Status from 'DRAFT' to 'PUBLISHED'
Chris R Coleman	01/21/2011 03:12:30 PM	CHANGED LINKED SURVEY HTML FROM: <IMG alt="" src="extranet/dsiqa2008x64a_qng/exported/logo3d.gif"> [[$$$SURVEY$$$]]
Chris R Coleman	01/21/2011 03:11:12 PM	Changed Status from 'PUBLISHED' to 'DRAFT'
Chris R Coleman	11/05/2010 10:02:45 AM	Changed Status from 'DRAFT' to 'PUBLISHED' Changed Embedded from 'Y' to 'I'
Chris R Coleman	11/05/2010 10:02:39 AM	Changed Status from 'PUBLISHED' to 'DRAFT'
Chris R Coleman	10/25/2010 11:57:29 AM	CHANGED QUESTIONS FROM:

#	QUESTION NAME, TEXT, ANSWERS	ARRANGEMENT	TYPE	COLS	HEIGHT
1.	LikedAvatar Did you like the movie Avatar? Yes, No, Did Not See it	over	radio	3	
2.	LikedUpInTheAir Did you like the movie Up In the Air? Yes, No, Did Not See it	over	radio	3	
3.	MovieType	over	checkbox	2	

Tracking View Rates

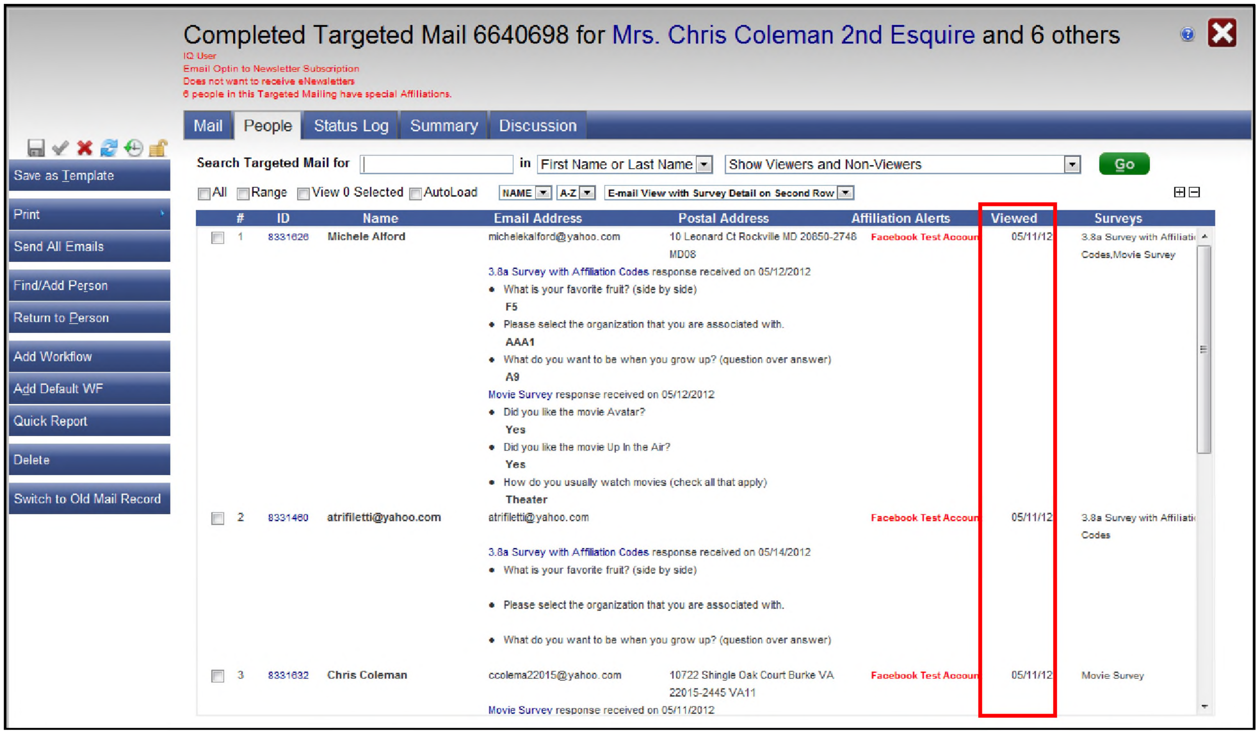
If your office is an Extranet Subscriber, the IQ Connect module will track which constituents have viewed an outgoing email sent from your IQ database. This is possible because outgoing emails sent from IQ contain a “hidden” graphic with a source ID that uniquely identifies the email.

When the graphic is “displayed” in the recipient’s email client, the extranet server’s Web Log is updated with a dated entry that includes the “ID” portion of the URL. The ID portion of that URL contains enough information so that IQ can identify the correct record for that particular email. A self-replicating background job called “Import E-Mail Viewlog From Extranet” retrieves the email view statistics and eSurvey responses from the IQ Connect server and updates the appropriate People and Mail records in your IQ database.

Web Log information is stored in the Status Log panel of the Mail record for the eNewsletter or eSurvey. You can also use the IQ List Processor to select view rates and counts using the "Viewed E-mail Percent” and "Viewed E-mail Count” objects. In addition, you can view the Targeted Mail Recipient Analysis report from the following places in IQ. This report provides a detailed analysis of the recipients of the email by the view rate and non-deliverable rate as well as details on any surveys that the recipient has filled out. In addition, if the eNewsletter contains external hyperlinks, IQ will display the view count for each viewed hyperlink.

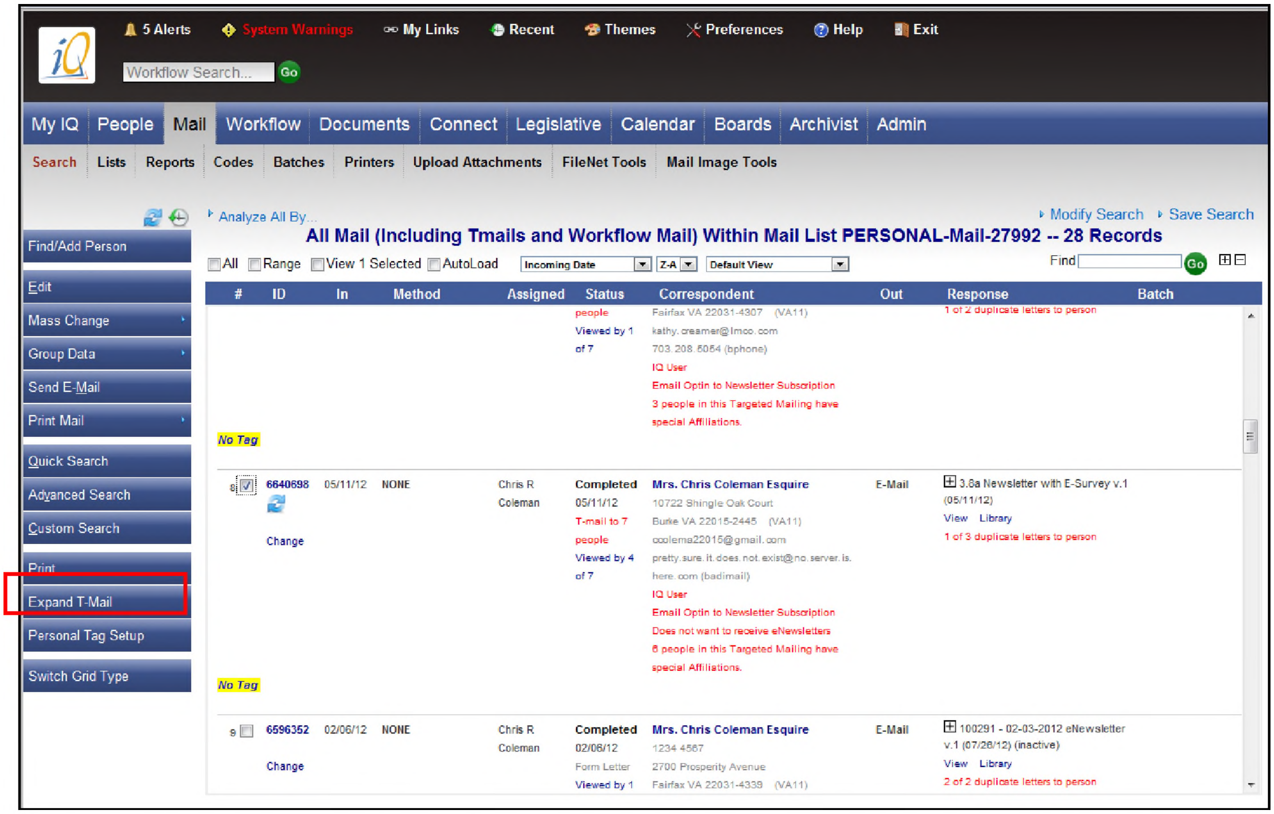
Tracking eNewsletter Views

If you have sent an eNewsletter as a targeted mailing, it is possible to track the number of people who have opened and viewed that newsletter. To do this, open the Targeted Mail record and navigate to the People panel. You will see a column called "Viewed". This indicates which correspondents have viewed the eNewsletter.



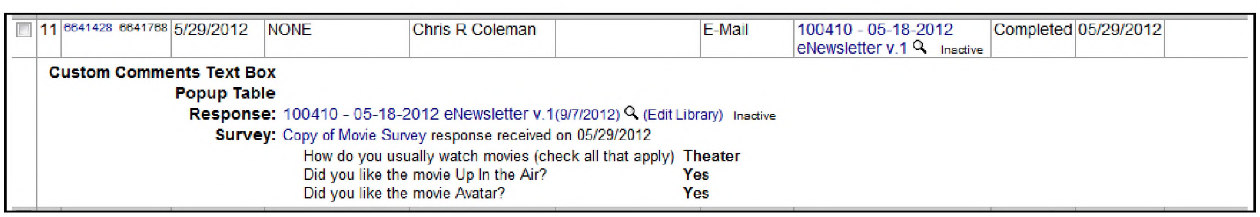
eSurvey Responses

Survey responses can be seen in the Mail and Batched Mail Explorer pages. The survey response is linked to the email that contained the linked survey.

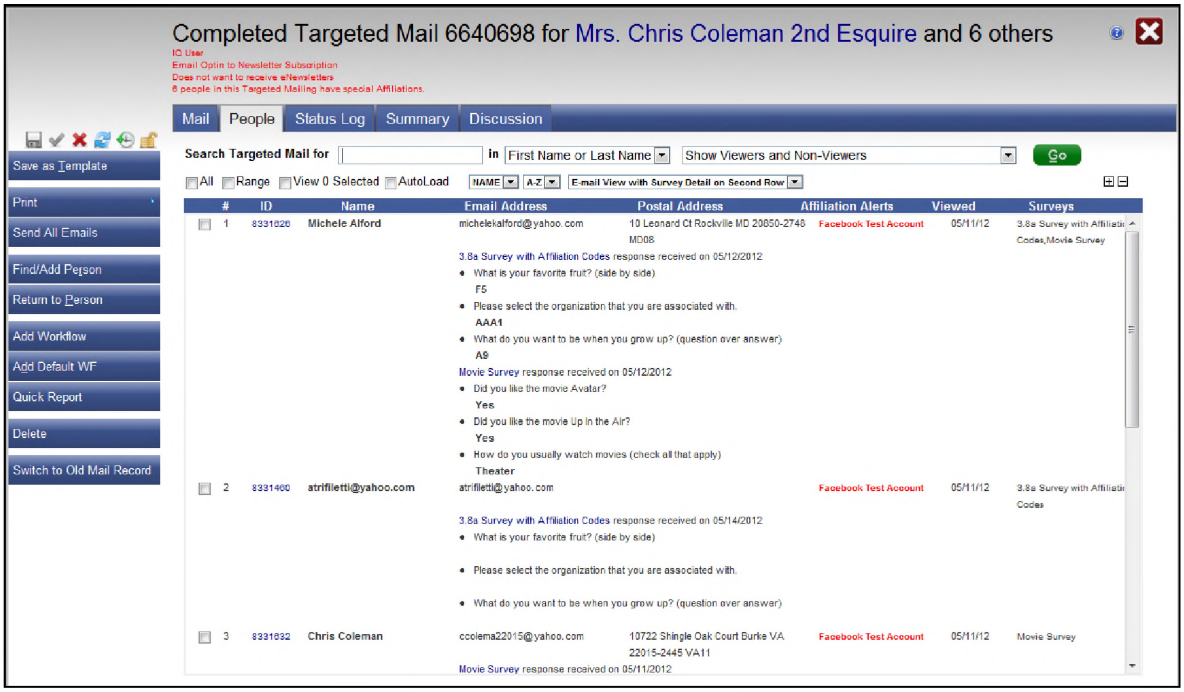


Targeted mail records are normally handled in a special way when viewed in the mail explorers. Only one instance of the t-mail is shown and the correspondent information shows a message that says “and xxx others”. If you want to see the response information of those others in the mail grid then you need to use the “Expand T-Mail” action.

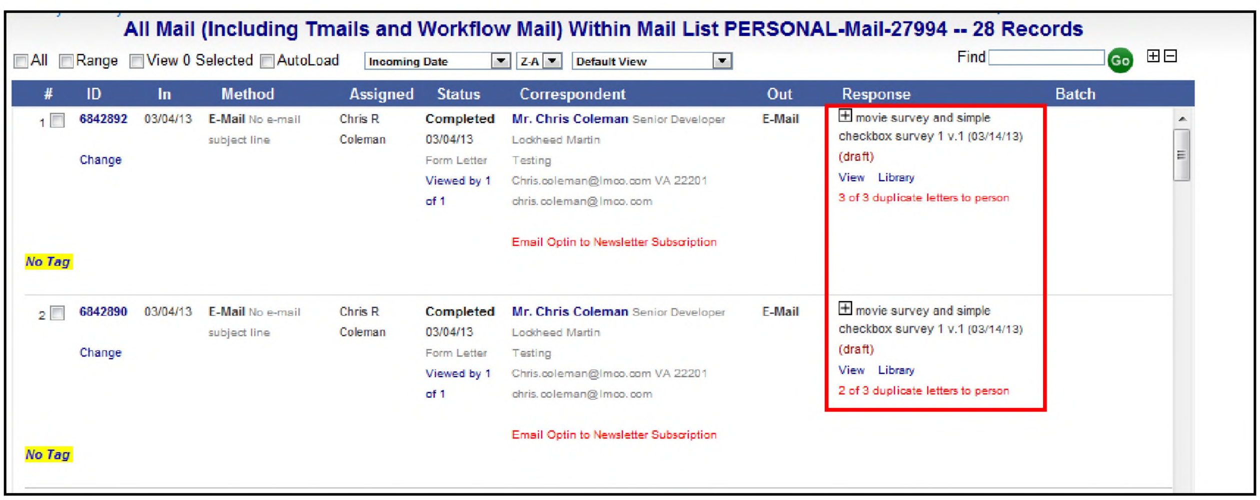
Survey responses can be seen in the People Record on the Mail Tab.



Survey responses can also be seen in the Mail Record on the People Tab. If this is a targeted mailing, you can also filter by survey response.

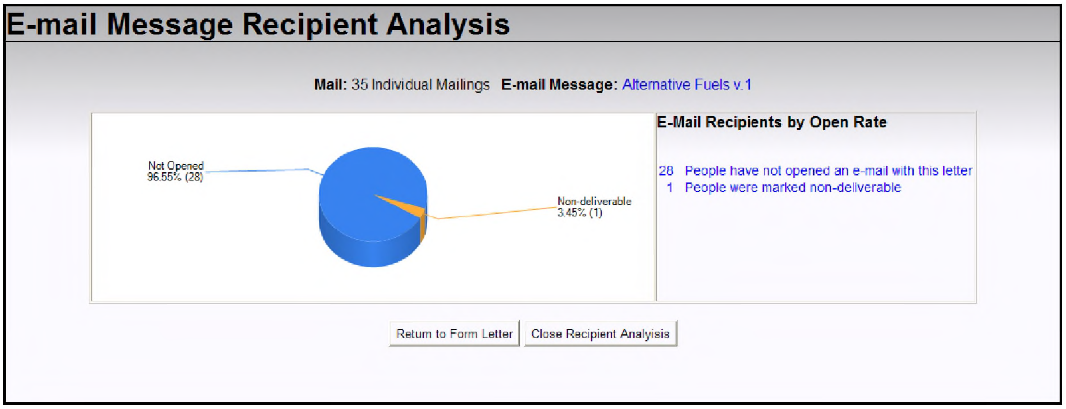


In the Mail Explorer grid and batched mail explorer grid under the Outgoing Method column there is a hyperlink on the "view" statistics on that page. That hyperlink will take you to a detailed report that analyzes the recipients of the email by the view rate and non-deliverable rate as well as provide details on any surveys that the recipient has filled out.



This same dialog is available from within the Mail record page and is also available from the Form Letter record page as well. When this analysis report is run from the Form Letter record page it aggregates all of the completed emails that used this form letter into a single recipient analysis.

The first chart on the report shows who has viewed the email, who has not viewed it, and who was marked non-deliverable shortly after being sent this email.



A person is marked as non-deliverable if their people record was marked non-deliverable after they were sent this email and before any other subsequent emails were sent.

The second chart shows which people who opened this email took the survey.

All subsequent charts show the survey results. If a survey question was single valued it is shown as a pie chart. If it was multi-valued then it is shown as a bar chart.

The charts themselves allow you to double click on pie wedge or bar and view the people who fit that grouping. A "Modify Analysis" link in the people explorer will appear if you do that so that you can easily get back to the Recipient Analysis report.

Searching for eSurveys

You can search for eSurveys based on information entered in the status, type, owner, name, description, created or modified date field or combination of fields. In this way you can find, for example, all eSurveys with a particular status code, those eSurveys created within a data range, or even eSurveys containing a particular text string in their **Name** or **Description** fields, or those with a combination of these criteria.

Searches are saved in History like most other module searches and can be set up as “quick links” on the My IQ page in the “Links” section by selecting “Save Search”.

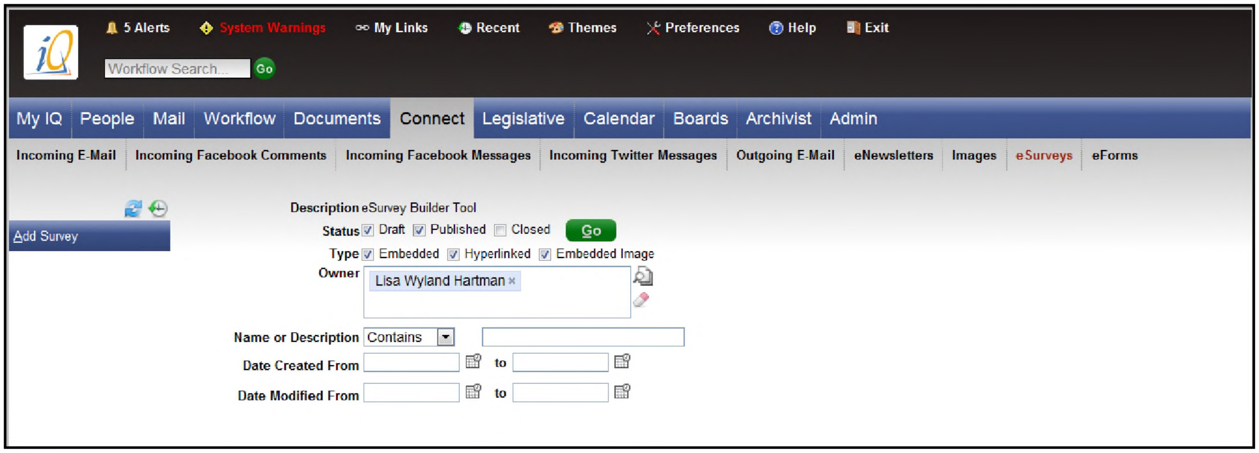
How to search for an eSurvey:

1. Click the Documents tab and click the eSurvey submenu link.
2. The Owner field defaults to your IQ user name.
3. Click the GO button to search for eSurveys that you own; OR Make changes to the fields on the Search Criteria page if you want to expand or further limit the search and then click the Go button to begin the search.
4. Your search results appear on the eSurvey Search Results page. From there you may click an ID link to view or edit the eSurvey Record page. If you’re not satisfied with the results of your search, click the Modify Search link to modify your search with additional or different criteria.

Search Criteria

Fields on the **eSurvey Search** page let you search for eSurveys. You can search for an eSurvey based on who owns it, the status, type, name or description, and when it was created or last modified. An eSurvey must meet all criteria entered on this page in order for IQ to locate it with the search.

The following search fields are available: Status, Type, Owner, Name or Description, Date Created and Date Modified.



Status

When you create a new eSurvey, it defaults to the status Draft. You can limit the search results to eSurveys that have the same status by selecting the check box next to the status. The check boxes in this section are sticky, so when you log out of IQ and back in, IQ remembers which types were selected. Remove the check boxes to find all eSurveys regardless of their status.

Type

The Type allows you to limit the search results to eSurveys that are the same type: Embedded or Hyperlinked. The check boxes in this section are sticky, so when you log out of IQ and back in, IQ remembers which types were selected. Remove the check boxes to find all eSurveys regardless of their type.

Owner

This field defaults to your IQ user name. If you want to search for eSurveys that are owned by ALL IQ users, then click in this field and remove your name. If you want to limit the search to a specific user or users, click the lookup icon and select one or more users for entry in this field.

Name or Description

You can search for an eSurvey based on its name or description. Click in the first field and select **Contains, Starts With,** or **Ends With** to find all eSurvey names or descriptions containing, beginning with or ending with the string you enter in the second field. These string searches are not case sensitive. If you know the EXACT name or description of the eSurvey, select **Exactly** in the first field and then type the entire name or description in the second field.

Date Created

To find eSurveys created within a date range, enter a beginning date in the **From** field and an ending date in the **To** field by typing a date in the field or by clicking the calendar icon and selecting a date. Leave both fields blank to include all eSurveys in your search, regardless of when they were created. Enter a date in the **From** field only to find all eSurveys with a creation date equal to or greater than that date. Enter a date in the **To** field only to find all eSurveys with a creation date less than or equal to the one in the **To** field.

Date Modified

To find eSurveys that were modified within a date range, enter a beginning date in the **From** field and an ending date in the **To** field by typing a date in the field or by clicking the calendar icon and selecting a date. Leave both fields blank to include all eSurveys in your search, regardless of when they were modified. Enter a date in the **From** field only to find all eSurveys with a modified date equal to or greater than that date. Enter a date in the **To** field only to find all eSurveys with a modified date less than or equal to the one in the **To** field.

Searching for eSurveys - Results

When you submit your search criteria by clicking the **GO** button, all records that meet your criteria appear on the **eSurvey Search Results** page. The total number of records found appears in the page title. The number of records appearing on one page is shown in the **# per Page** field below the title. To change this number for the current and future Search Results, clear the field, type a different number, and press the TAB key. IQ will retain this number until you change it or your System Administrator resets it with the **Configure** option. Note that the more records per page, the longer it takes to display the results.

Use the scroll bar or the DOWN ARROW key to move to the bottom of the page. Click the > link or **Page Down** button to view the next page; click the < link or **Page Up** button to view the previous page. To go to the end of the list, click the >> link. To return to the beginning of the list, click the << link. Links are unavailable if there are no additional pages or if you're at the end or beginning of the list.

The **Search Results** page shows information about each eSurvey found including the ID, survey name and description, number of questions, owner, status, survey usage, whether the survey is embedded or linked, and when the survey was created and last modified.

Click a column heading to re-sort the search results by information in that column. IQ will retain the selected column sort until you change it. Click the ID link to go to the **eSurvey Record** page. If you've selected multiple records, select the **Edit** action to access the first record. Then, when you're finished with that record, select the **Next** action to open the next selected record. The next record will open to the same panel as the last panel used.

You can customize the display of the **Search Results** page by selecting columns to Hide or Show. A plus sign (+) appears when you place the mouse cursor above a column heading, if the column can be hidden. Right click and select the column name in the pop-up to hide the column. To display the column, right click in a column heading and a list of hidden columns will appear. Select the check box for the column names that you would like to display and click the Show button. Generally, the check box, number and ID columns cannot be hidden. Your settings for hidden columns will remain until you change them.

eForms

eForms provide the ability to create external web forms in IQ, to publish those web forms to the IQ Connect server, and either mail links to the forms or put links for the forms on web pages. In this way, people external to IQ can add data to the IQ database. You must have IQ Connect in order to use eForms. Your ITC will be able to assist you in getting eForms activated for the individual users in your office that will create and publish the forms.

eForms are useful should you wish to allow people outside your office to create a workflow in IQ, or to fill in a Mail response form on the web. You can create web forms which can be attached as links on either web pages or distributed through emails.

It is also possible to create a Calendar event from incoming webform emails using the <APP> tag value of "CALENDAR" and other XML tags for IQ Event record fields for Calendar Name, Date, Start Time, End Time, Summary and Short Description. Also, the <ADDL_PEOPLE> tag can be used to attach new or existing People records to the IQ Event record.

To create an eForm, open the Documents module, and the eForms submenu. Select Add Form from the Actions menu. This will open the eForm Builder page.

eForm Record Page

General Panel

You will see the ID number, which was assigned by IQ, the Created and Revised Dates, which also include the time the form was created or revised. These fields are auto-populated by IQ and are not open for editing. You may enter a unique name for this eForm, as well as a description that will be useful in locating this particular eForm in the future.

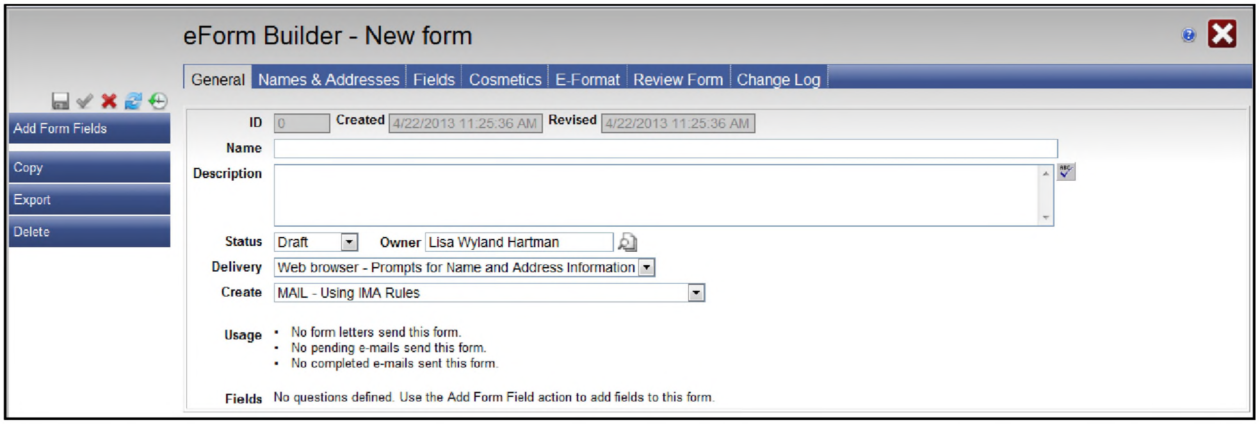
The Status is Draft, and should remain so until you are ready to publish the eForm. The Owner Field is populated with the name of the person who opened the Web Form, however it can changed as needed.

There are two methods for delivery:

- *E-mailed to people already in the database.* This option is used for responses to emails sent out from IQ. IQ will track the name and address information from the People record of the correspondent.

- *Web browser – Prompts for Name and Address Information.* This option is used to capture name and address information from those who enter data from a website. This option allows the user to enter their own name and address. If you use this option for a Workflow web form, you may also determine if you will allow the user to enter additional People records.

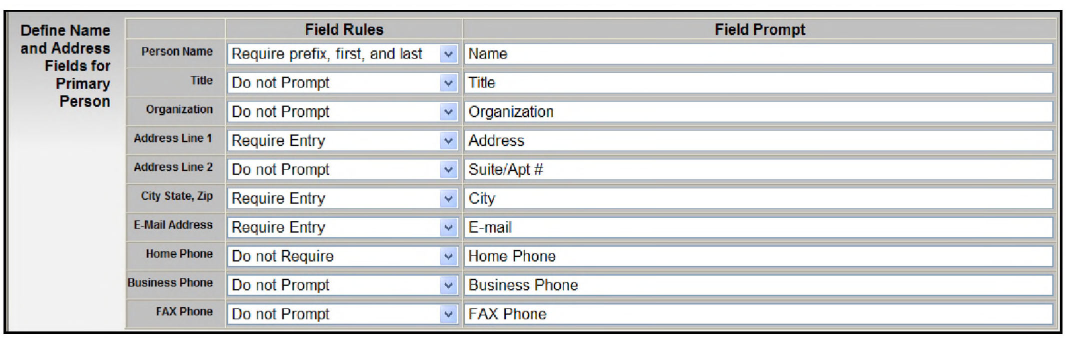
The Create field allows you to choose whether you are creating a web form for creating new Mail records which will be delivered to IQ using IMA rules, or whether your web form will be used to create new workflows in IQ using a selected template.



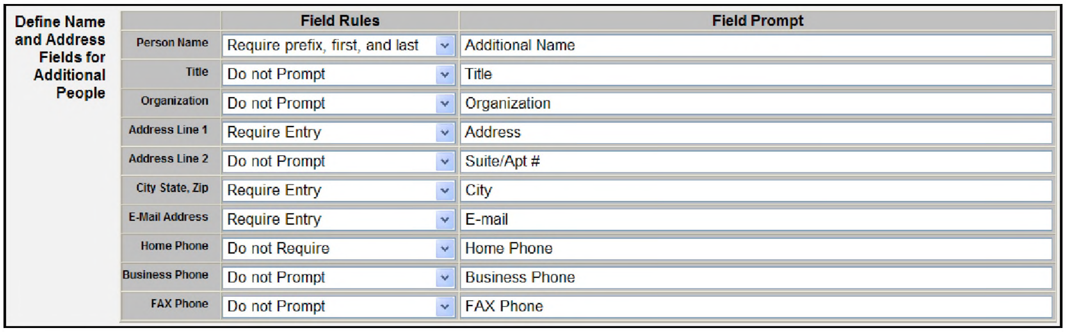
Once this web form has been used, you will be able to see information in the Usage field tracking the number of form letters and emails used. You are also able to see the individual questions from the form.

Names and Addresses Panel

If you selected the Web browser – Prompts for Name and Address Information option in the Delivery field on the General panel, you will be able to determine the fields in the People record that you would like to appear on the web form. You are also able to determine which fields will be required, which will appear but not be required, and which will not appear.



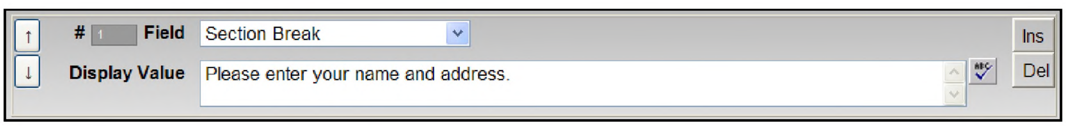
If you opted for a workflow template that will allow the user to enter additional People records, you will see an additional section to determine the characteristics of the People record fields for non-primary people.



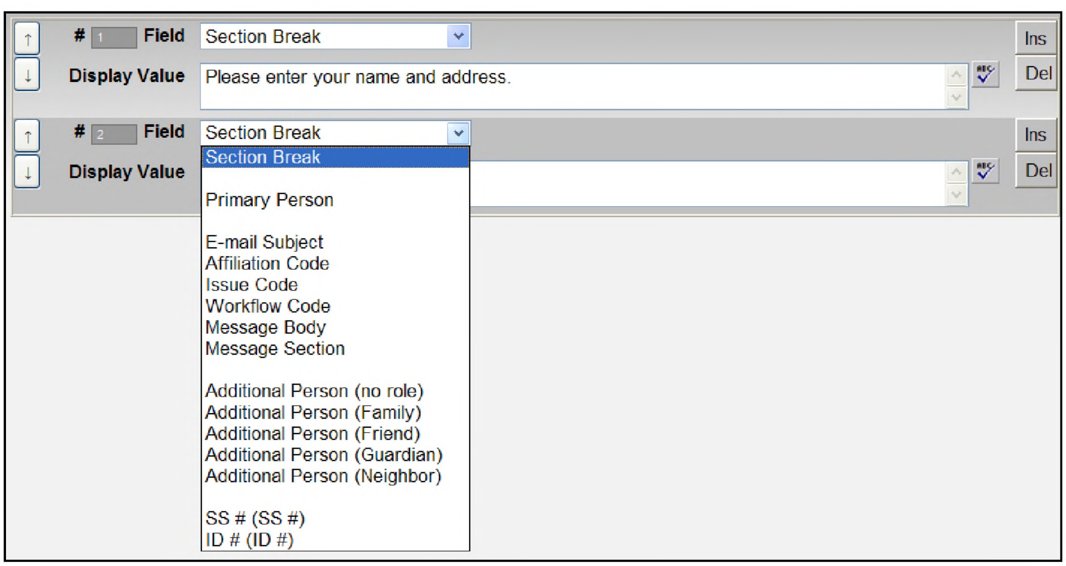
Fields Panel

The Fields panel allows you to enter the questions and determine the layout of the information you are requesting from your email or web site.

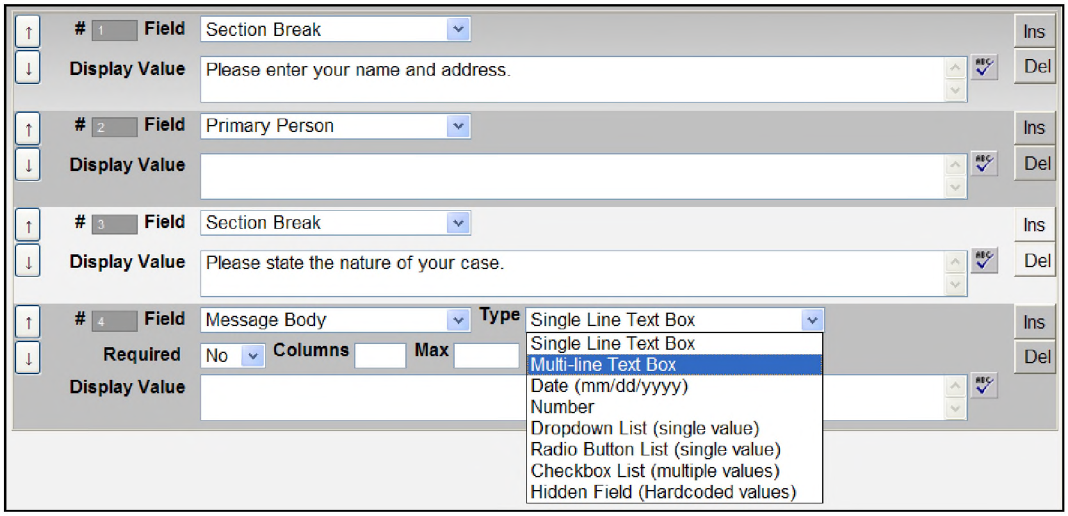
Use the Add Field action to begin adding your information. You can select a Section Break, which will allow you to type instructions for entry in the following field or fields.



You are also able to select fields from the Workflow Template or Mail record that you would like to have populated. These fields include some standard Workflow fields, as well as any custom fields in the template if you are creating a Workflow.

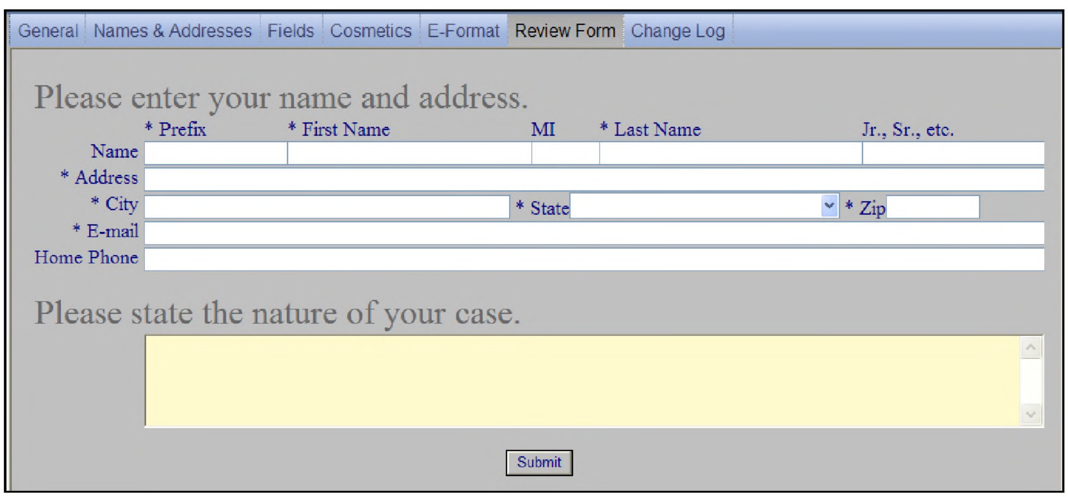


For fields other than Person information, you can select the type of field, its height and width as well.



Review Form Panel

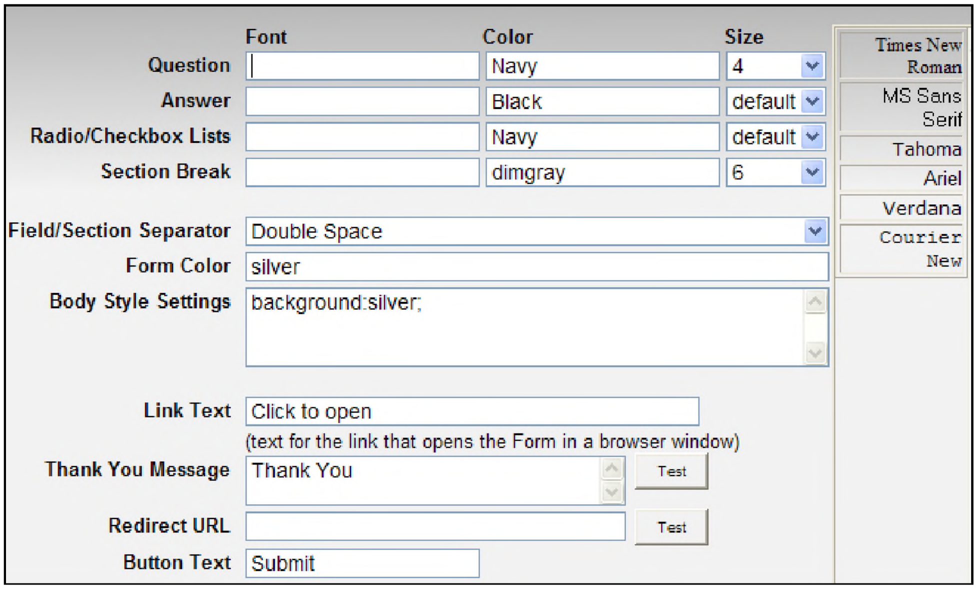
Once you have completed entry of all the fields, use the Review Form panel to see how your form will appear.



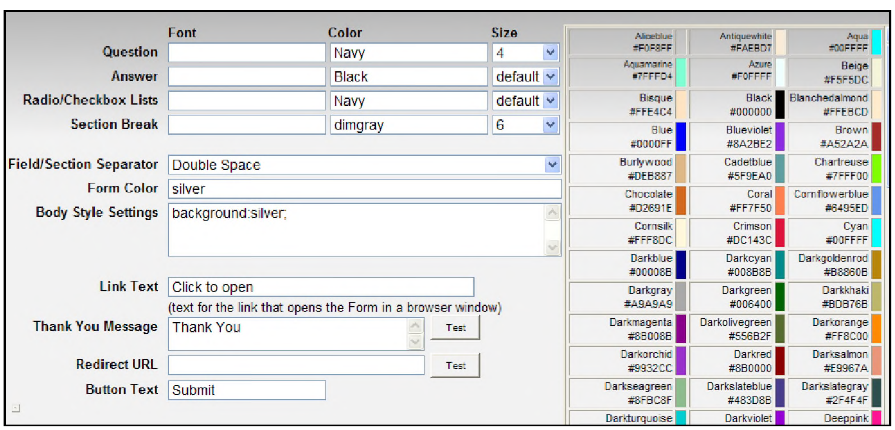
Cosmetics Panel

On the Cosmetics panel, you can determine the font type, font color, background color, question and answer colors, as well as the text for the link itself, the text for the submit button and the Redirect URL.

Clicking into the Font field for the question, answer, radio/checkbox lists or section break will open a list of available fonts to the right of the page. To select a font, type the name of the font in the Font field.



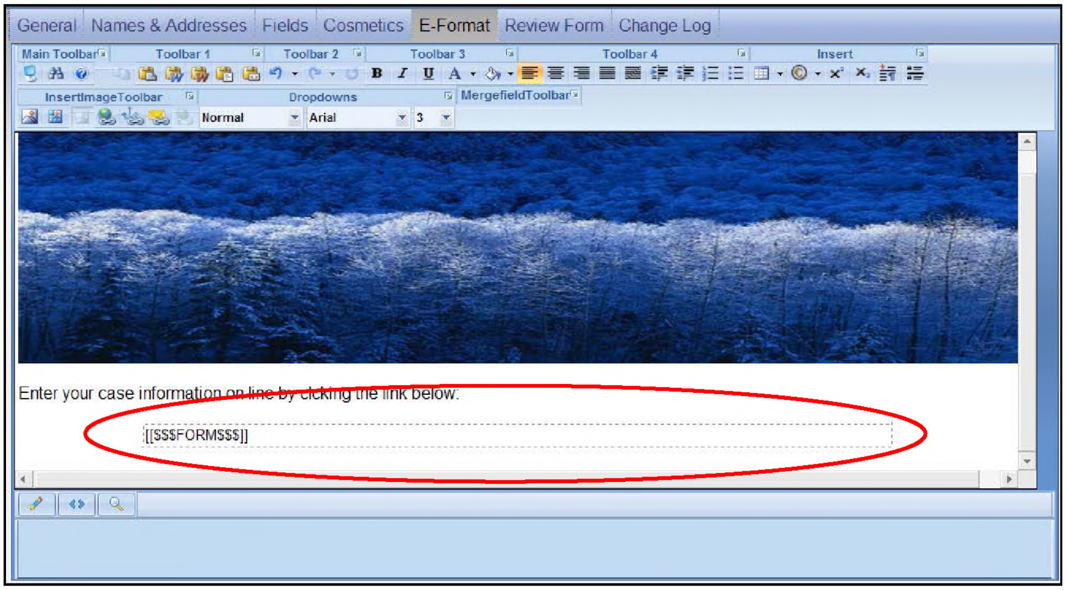
Click into any Color field and a list of available colors will be displayed to the right. Select the color you wish to use for that field by typing the name or the hexadecimal code in the color field.



Enter the text you would like displayed for the Link to your web form in the Link Text field. You can also type a thank you message that will pop up once the user has submitted the web form. You can enter the text of the button that the user will use to submit the form, and a redirect URL if you would like the user to be directed to another website once the web form has been closed.

EFormat

The EFormat is the frame within which your eForm is presented, whether you are delivering the eForm through email or through a web browser. Use graphics, text or any other objects you wish to create a sophisticated presentation. Because eForms is embedded in IQ Connect, you have the full capability of the HTML editor as you do when creating eSurveys or eNewsletters.



Change Log Panel

Finally, you can track all changes made to eForms by selecting the Change Log panel.

General | Names & Addresses | Fields | Cosmetics | E-Format | Review Form | Change Log

User	Date & Time	Changes
QC	02/07/2011 02:42:45 PM	Changed htmlBodySettings from 'background:coral;' to 'background:silver;' Changed BackgroundColor from 'coral' to 'silver'
QC	02/07/2011 02:42:08 PM	Changed BackgroundColor from 'silver' to 'coral'
QC	02/07/2011 02:41:34 PM	CHANGED LINKED FORM HTML FROM: <DIV align=center><TABLE width=700 border=0> <TD align='left'>[[$$$FORM$$$]]</TD> </TABLE></div>
QC	02/07/2011 02:41:34 PM	Changed htmlBodySettings from 'background:silver;' to 'background:coral;'
QC	02/07/2011 02:08:45 PM	Created

Publishing eForms

To publish a form to the IQ Connect Extranet server, select the option Publish Form from the Actions Menu, or change the Status to Published on the General panel. This will publish the form to the server and make it available for use in emails or as a link on a web page. eForms must remain on the IQ Connect server in order to track responses. Use the Actions Menu option Launch Published Form to see the published form open in a separate browser window.

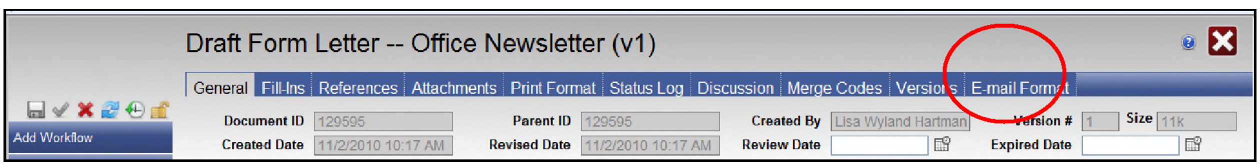
You are not able to edit published eForms. To update or edit, either change the Status in the General Panel to Draft, or select Edit Published Form from the Actions Menu. When you have finished making changes, publish the form again.

Attaching eForms to Emails or Web Pages

Once your eForm has been published, you are able to attach the form to an email or a web page depending on the type of form you have.

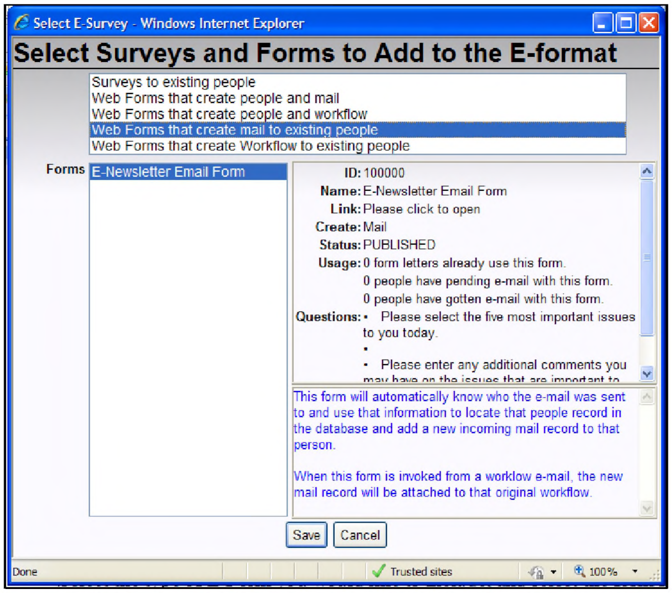
Attaching an eForm to an Email

When embedding an eForm into an email, you will need to use the EFormat panel in the form letter record.



In the EFormat panel, select where in the form letter you would like to embed the eForm. Click into that spot and select the eForm/eSurvey icon to open the list of published eForms and eSurveys.

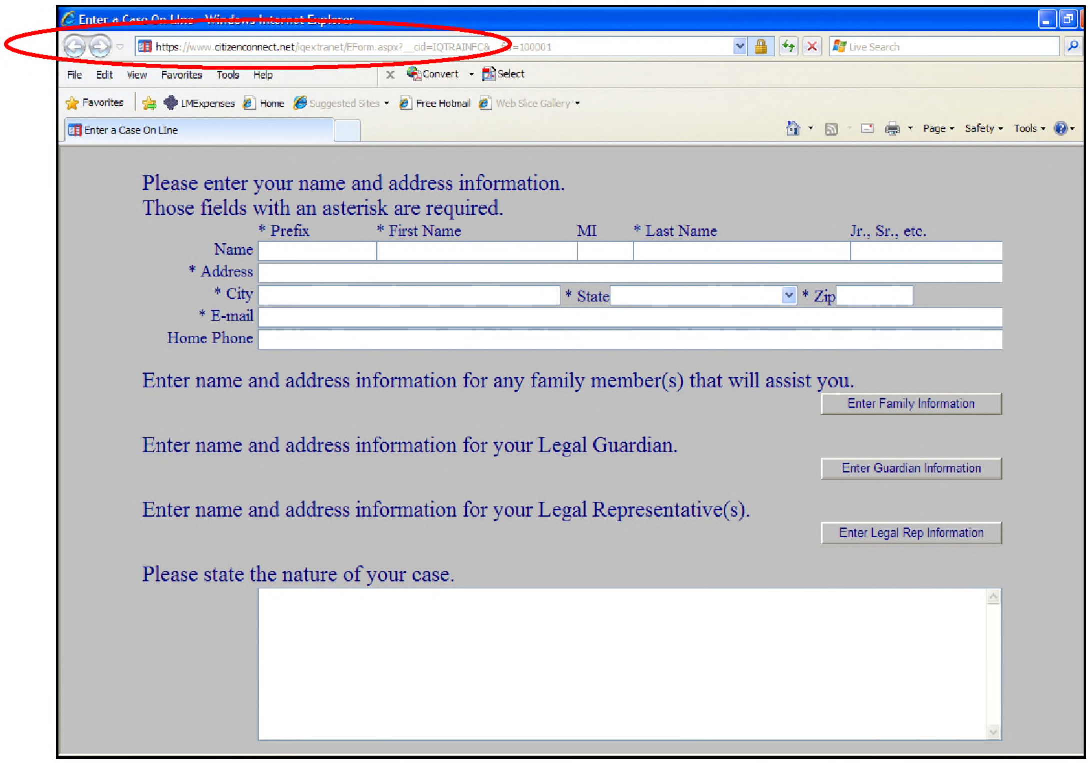
Select the type of eForm you would like to include, and select the form from the list that appears.



Once you save your selection, the eForm will be embedded in the form letter.

Attaching an eForm to a Web Page

If the eForm you have created will be launched from a web page, you will need to locate the URL for the form in order to insert it into your page. To do so, the eForm must be in a Published status. Once it's been published, you will see the Actions Menu option to Launch Published Form. This will open the form in a separate window, and will display the URL in the browser.

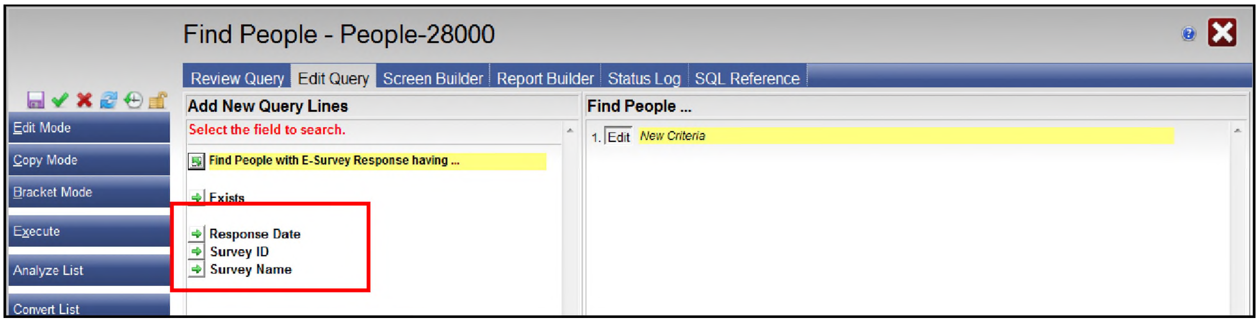


Copy the URL and insert it into your web page. Clicking on that link in the web page will launch the eForm in a separate browser window.

Using eSurvey in Lists

You can also use the IQ List Processor to select view rates and counts using the "Viewed E-mail Percent" and "Viewed E-mail Count" objects.

The Mail List option will allow you to locate eSurvey responses, and can be executed as a List or saved as a report.



You can also use a Documents List to create a list or report of all existing eSurveys.

Summary

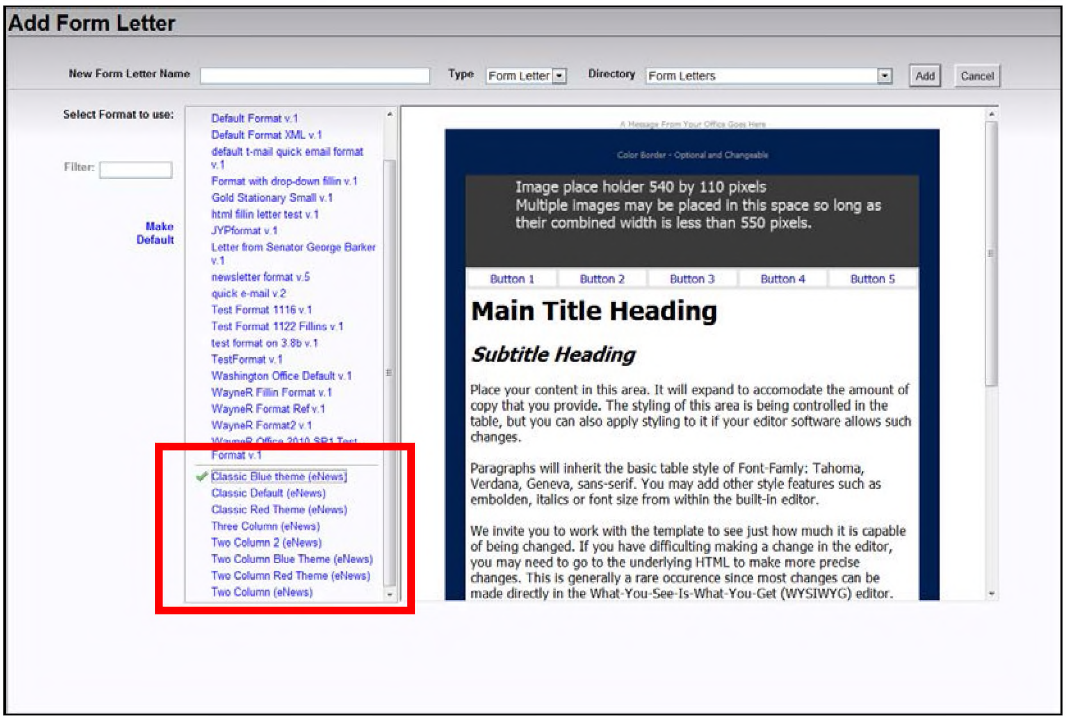
For More Information

Please work with your Lockheed Martin DSI Information Technology Consultant on additional use of the features described in this document.

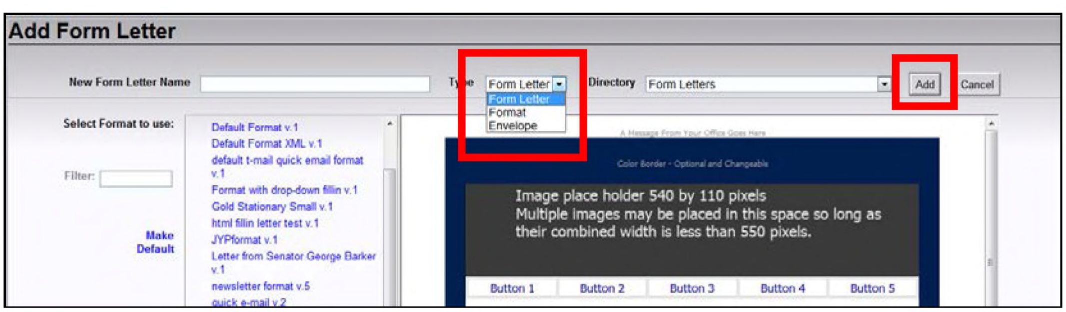
Appendix A

Creating a Format from an eNewsletter Template

Your IQ installation includes 8 templates that you can use to begin creating a personalized look for your newsletters. You will need to modify these templates for use. To do so, select **Add Form Letter** from either the My IQ page or the Documents panel.



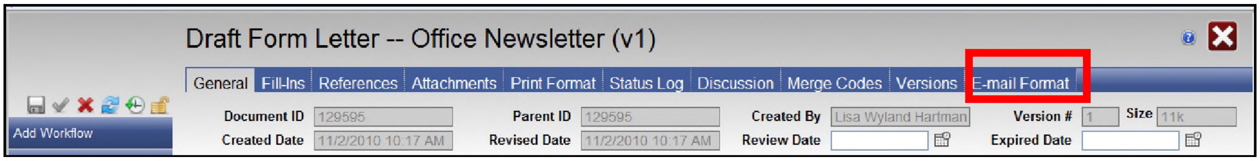
The Templates are listed at the bottom of the left column. Select the template that most closely resembles the format that you would like to create. In this example, we will use the Classic Blue template to begin.



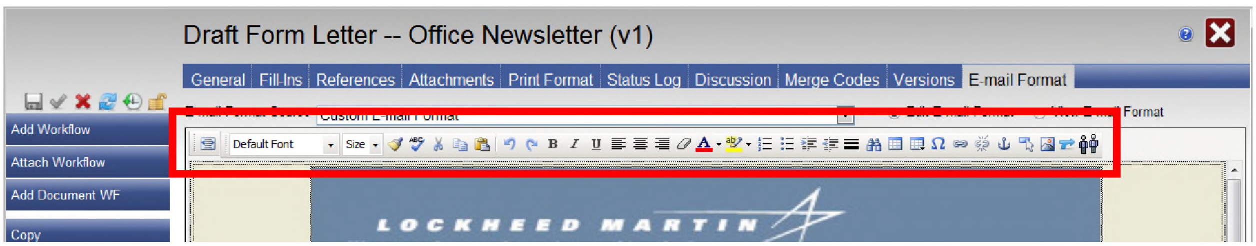
Select **Format** in the **Type** field. When you click the **Add** button, you will be able to edit the format.

Format Record Page

Once you click the **Add** button, the document record will open. To customize the format, navigate to the EFormat panel.



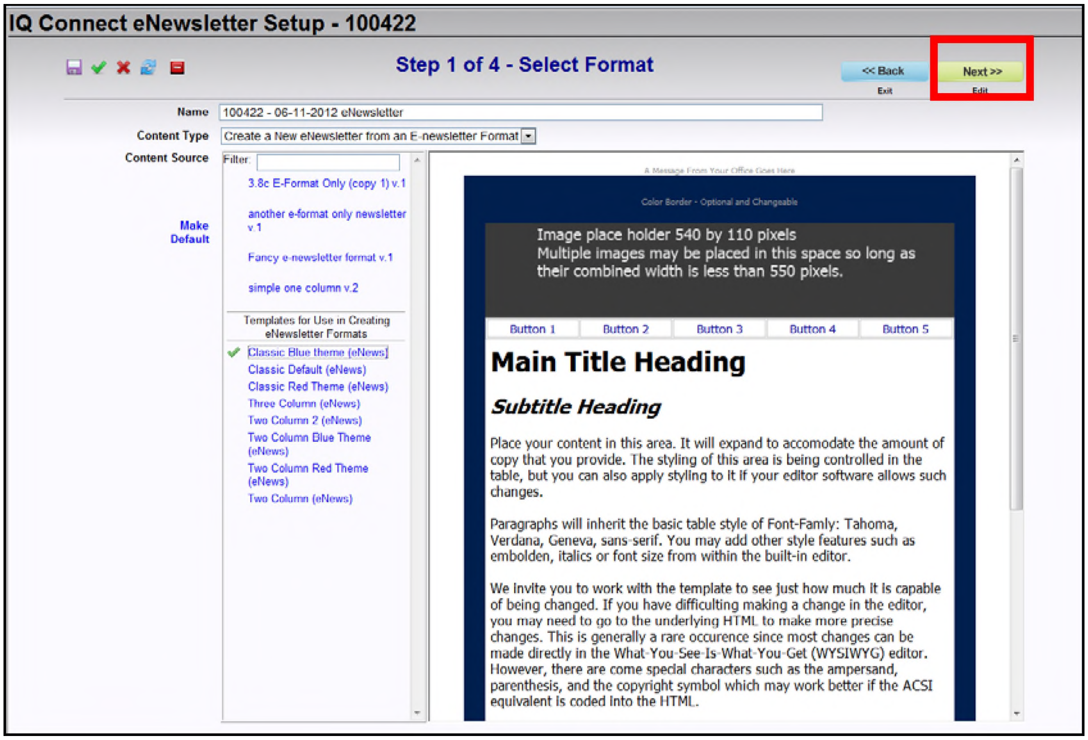
On the EFormat panel, you will use the HTML editor to add images, update colors and content, and enter hyperlinks.



You can use the information in the next section to assist you in customizing a format as well as customizing an eNewsletter. The HTML editor used in the Document record page is the same as in the eNewsletter Wizard.

Working with eNewsletter Templates

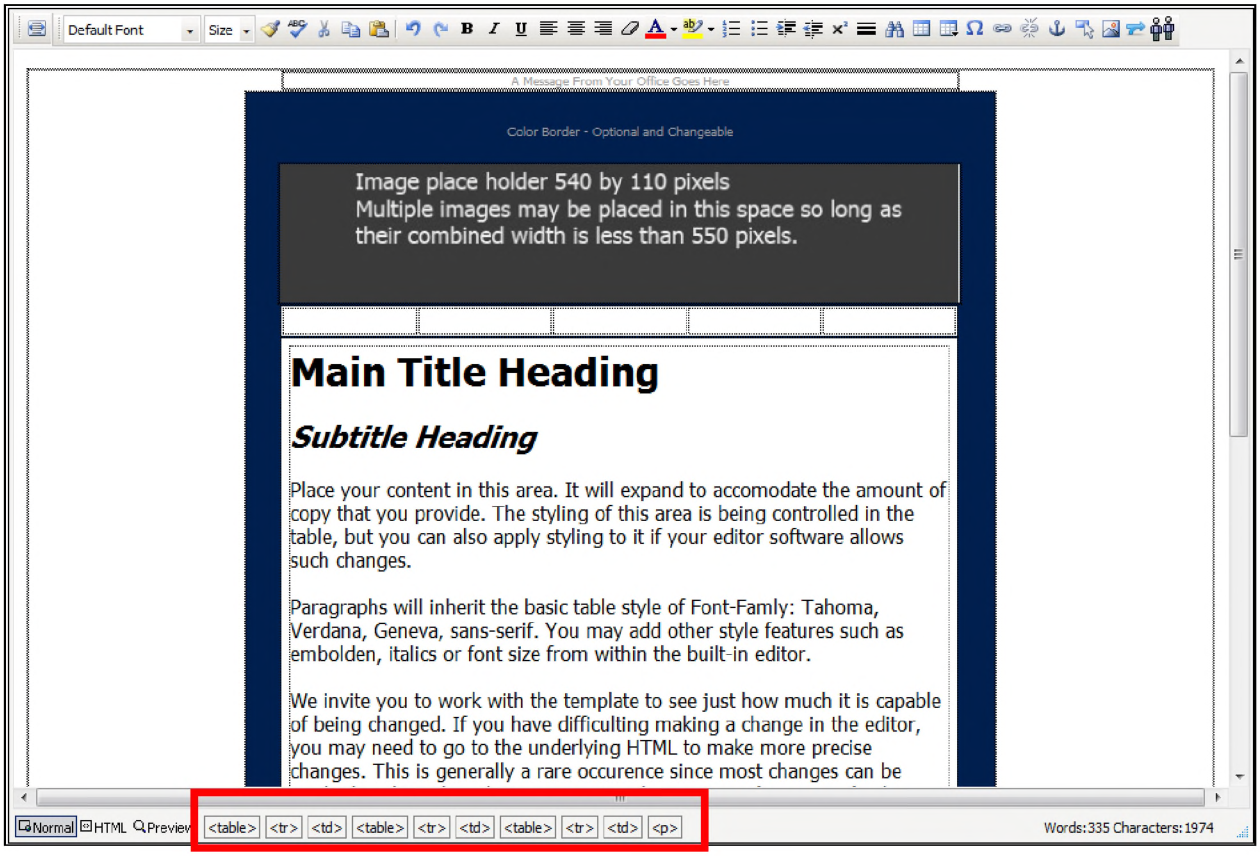
When creating a new eNewsletter, you may wish to modify an existing newsletter, or you may wish to create an entirely new look. On the **Select Format** page, select the format you would like



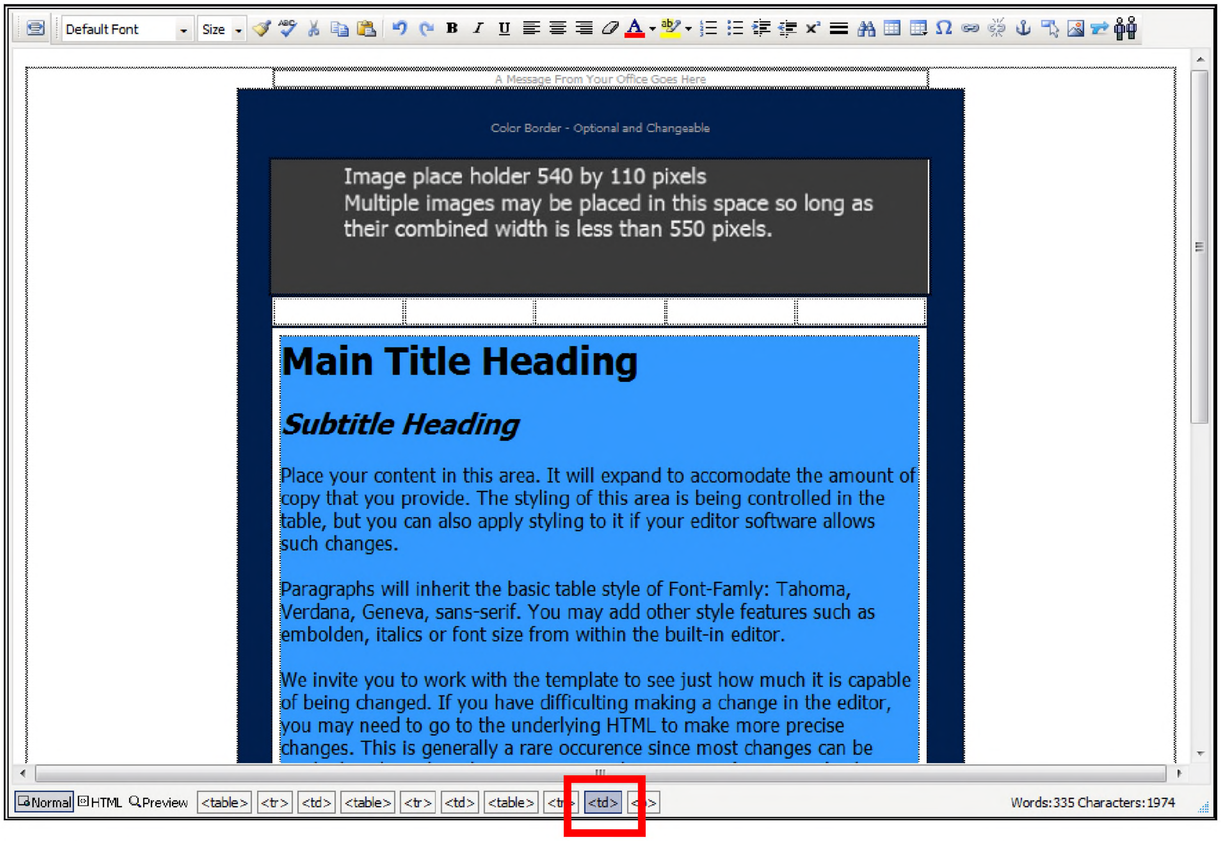
When you click the **Next** button, you will be in the **Edit Content** page. You will see the template displayed in an HTML editor.

Editing Table Elements in the HTML Editor

One of the most useful tools to use when editing your eNewsletter in the HTML Editor is the use of the elements at the bottom of the page. When you click into a section of the newsletter, you will see the elements relating to that section appear at the bottom of the page.



Hover your mouse over each element to see what portion of the eNewsletter is selected for editing. In this example, the entire color border has been selected.



Click the table element with your mouse to open the Properties menu option. This will allow you to set height and width, color, alignment, border information, font information and more.

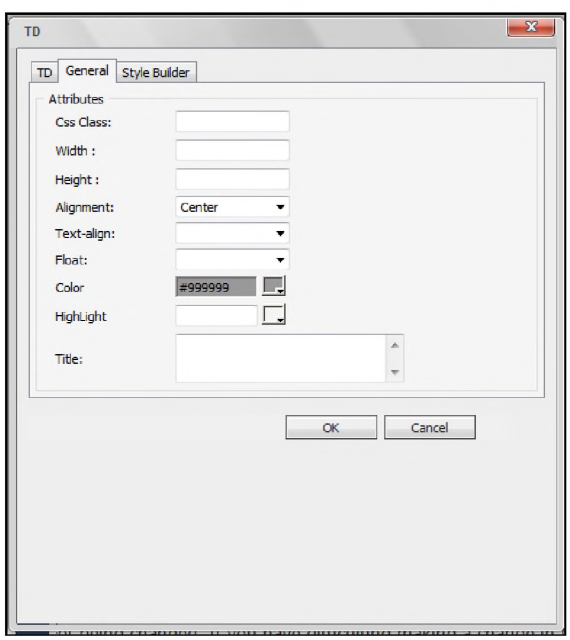


Table Elements

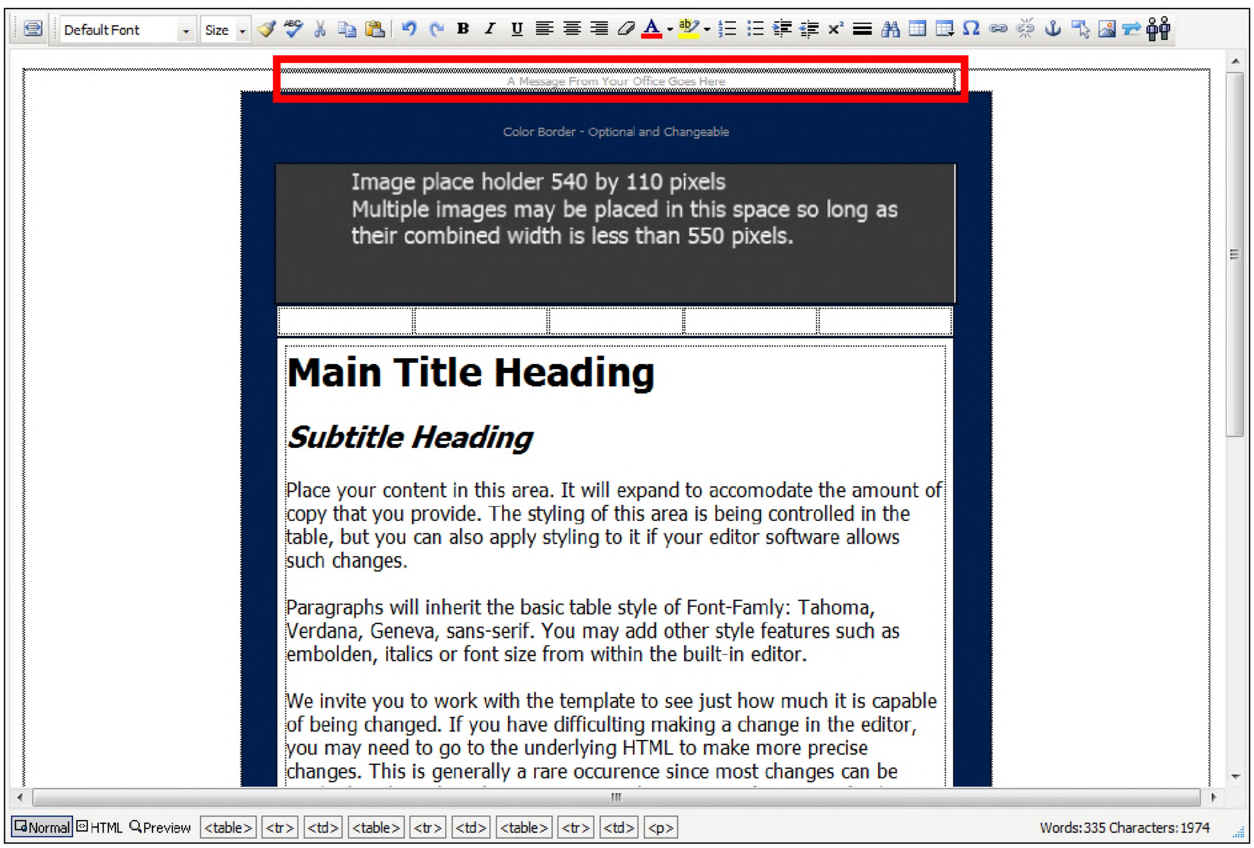
Message from your Office

The first line in the template is a text box, which reads: "A Message from your Office Goes Here". You should enter your own text here. This text box serves a number of important functions:

1. This is the first object read by an email client. This is important, as many newsletters begin with an image file. A text box is less likely to be sent to Spam, blocked, or deleted than an image file.

2. Text loads much more quickly than photos.

3. Recipients with a mobile device will read this text immediately following the subject of the email. This is an opportunity to catch their attention.



If you do not wish to use this text box, you may simply delete it.

Color Border

The next section in the template is the Color Border. Using the table elements at the bottom of the page, change the Color Border to be any color you wish. You will also wish to delete the text in this field.

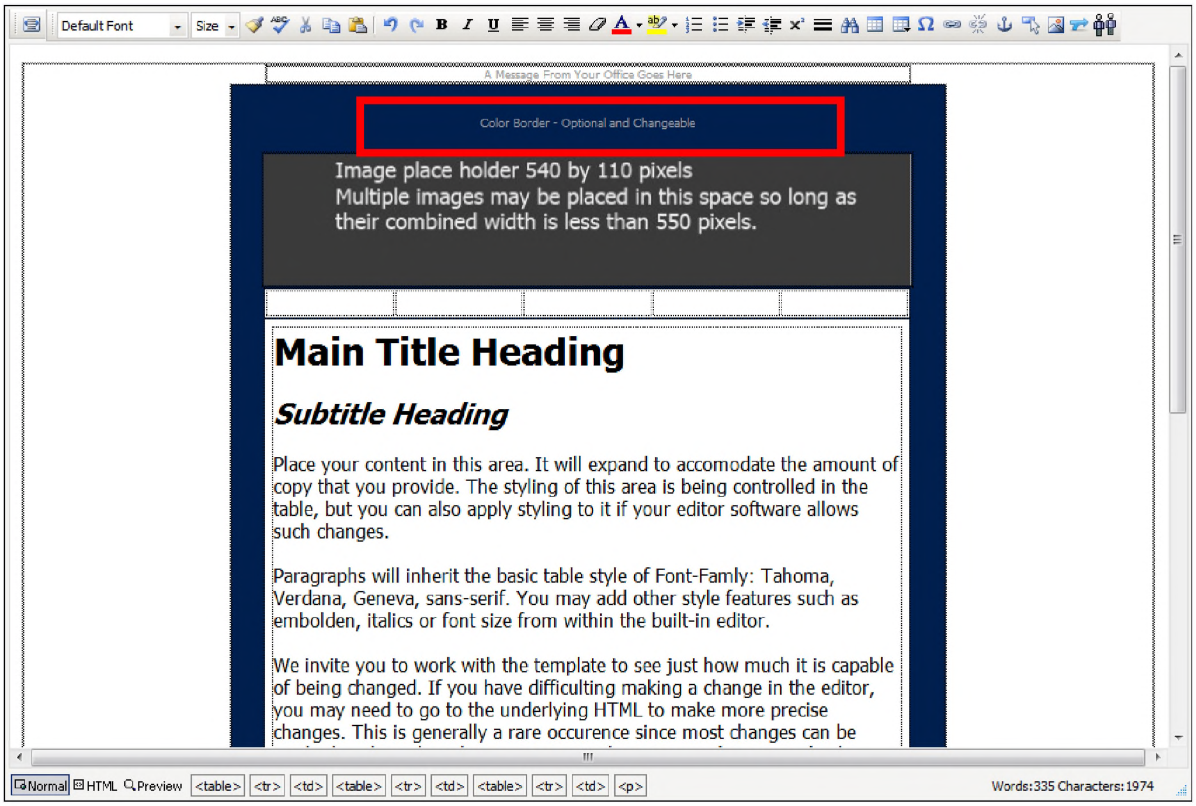
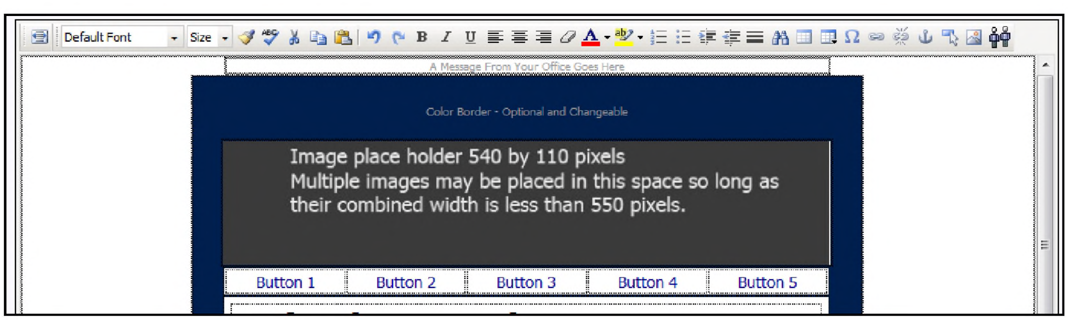


Image Placeholder

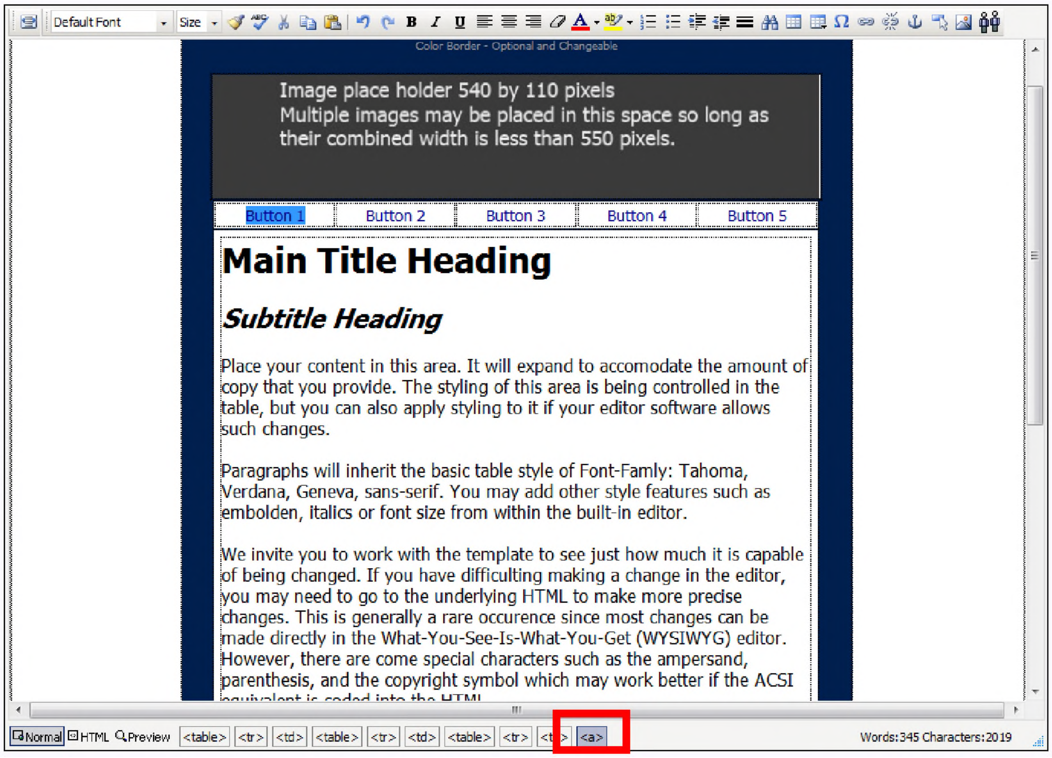
The next section is the Image Placeholder. This section allows you to include a photo image of your choosing in the header of the eNewsletter. Notice the text recommends the exact size of the photo image to use. In this example, the eNewsletter is configured for a 540 x 110 image. The image should be edited to that size BEFORE being uploaded into IQ. This will save time when loading the eNewsletter in a client email.



Buttons

Buttons are included in the eNewsletter to mimic a website if desired. You can eliminate the buttons altogether by selecting the Table Element and deleting the entire row.

If you wish to configure the buttons, you can highlight the text of each button, and select the last table element option. Clicking on this table element will allow you to open the Properties page, where you can configure the associated URL for a button.



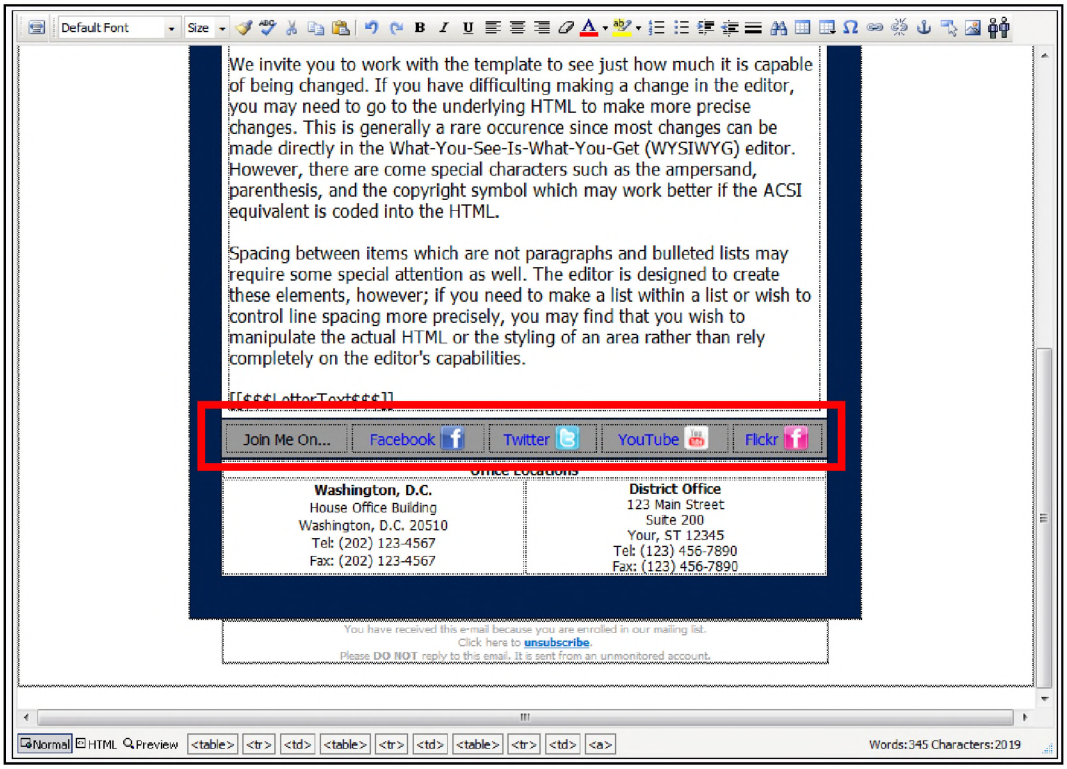
Content

You can enter any content that you like in the main content section. It is not recommended that you cut and paste from a Microsoft Word document, as content may not display as you wish in all email clients. The best option is to either type the content directly in the editor, or cut and paste from a .txt file.

If you like the styling in the content, the best option for entering your own Main Title Heading or Subtitle Heading is to delete all but the first letter of the heading, type your own, then delete the first letter. This is preferable to clearing the entire heading and typing your own, as it allows you to maintain all of the style features.

Social Networking Ribbon

Directly below the content, you will find the Social Networking ribbon. Use or delete the options as you wish. You will need to open each option to enter the URL to your particular sites. You may enter the URL on the text, the image, or both. The icons are 24 x 24.



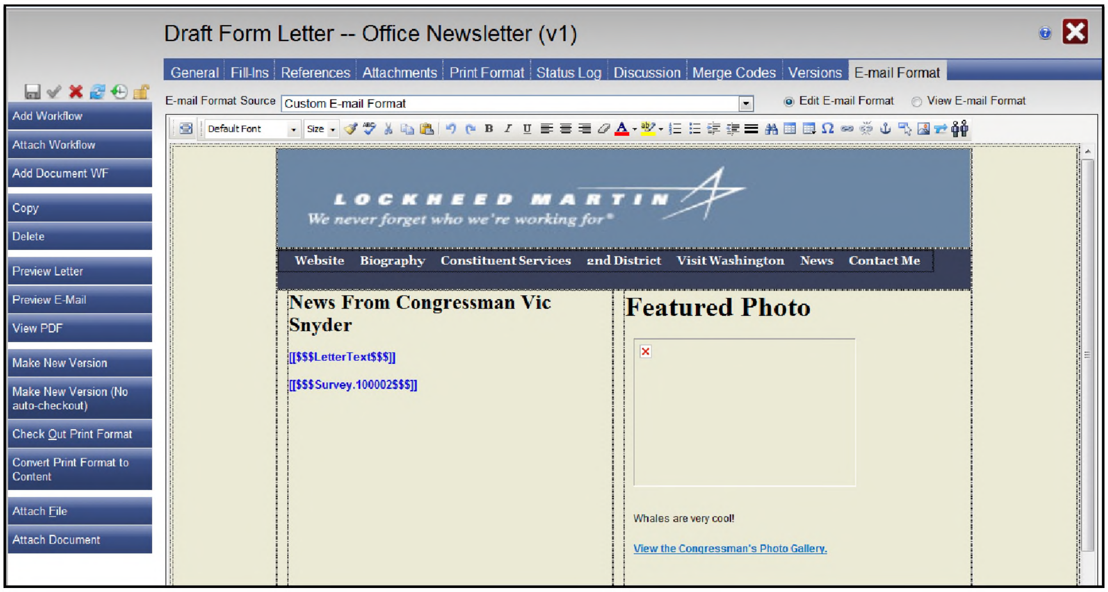
Unsubscribe Information

At the bottom of the template you will find an Unsubscribe table. You can set the Unsubscribe URL to point to a website, an email address, a survey, or a web form, depending on how the office wishes to handle the unsubscribe process. With IQ Connect, you can use a Web Form to automatically enter an UNSUBSCRIBE Affiliation Code directly into the People record, so that this individual is no longer part of a mailing by Affiliation Code.

Both the eSurvey and eForm support the removal of an Affiliation Code. This means they can be used for subscribe (i.e. add the affiliation code EMAIL.OPTIN) and unsubscribe (i.e. remove the EMAIL.OPTIN affiliation code).

Exporting Images to the Extranet

You can upload images into the IQ **Documents** module and then export the images that have been approved for use in your outgoing email to the extranet.



How to export an image to the extranet:

1. From the Documents panel or the My IQ page, select Add Document.
2. Browse your workstation for the image you want to export and select.
3. If you wish to use the name of the image file as the name of the IQ Document, leave the image file name in the Document name field. Otherwise, type the name of the document you are creating in the Document name field.
4. Select Add.
5. Once the Document record page opens, select the Export to Extranet action.
6. IQ displays the message "SUCCESS – Export to Extranet Completed".
7. Click the OK button.
8. Select the Save and Close action to close the Document Record page.

You must have access rights to Documents Lock #227 – Export Image Files to Extranet in order to export image files to the IQ Extranet.

Using the HTML Editor for eSurveys and eForms

IQ Connect uses the Cute Editor for ASP.NET as its integrated HTML editor, which allows you to easily create and edit your eNewsletters and eSurveys without the need to have experience working with HTML. eNewsletters that are constructed entirely in the eFormat (that is without using a pre-existing format) will have all HTML from Microsoft Word removed.

This document includes three common features of the Cute Editor. If you would like more information on how to use the editor, please contact your Lockheed Martin DSI Information Technology Consultant.

Formatting Font

You are able to update fonts within your newsletter. Once you have selected the text that you would like to update, you can select the font name from the dropdown list, as well as select the size of the font.

You can also make the selected text bold, italicized or underlined.

You can also change the font or background color.

Inserting a Graphic

Once you have images uploaded to the web server, you are able to insert them into any eNewsletter.

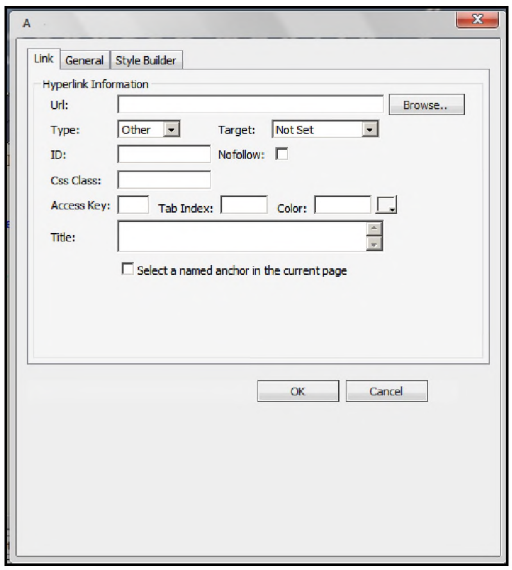
To Insert a Graphic into an eNewsletter:

1. Click the Image Manager Icon  to open the dialog box.
2. Locate the folder in which the image is stored.
3. Once you have located the image, click the file name to select.
4. Click *Insert.*

Inserting a Hyperlink

You can also insert a hyperlinked web address or email address into your eNewsletter. To do so, you can use the hyperlink manager or the email link manager.

Once you click on any of the three hyperlink icons, you will see the Hyperlink Manager dialog. From this dialog, you are able to manage web hyperlinks, anchor hyperlinks or email hyperlinks.



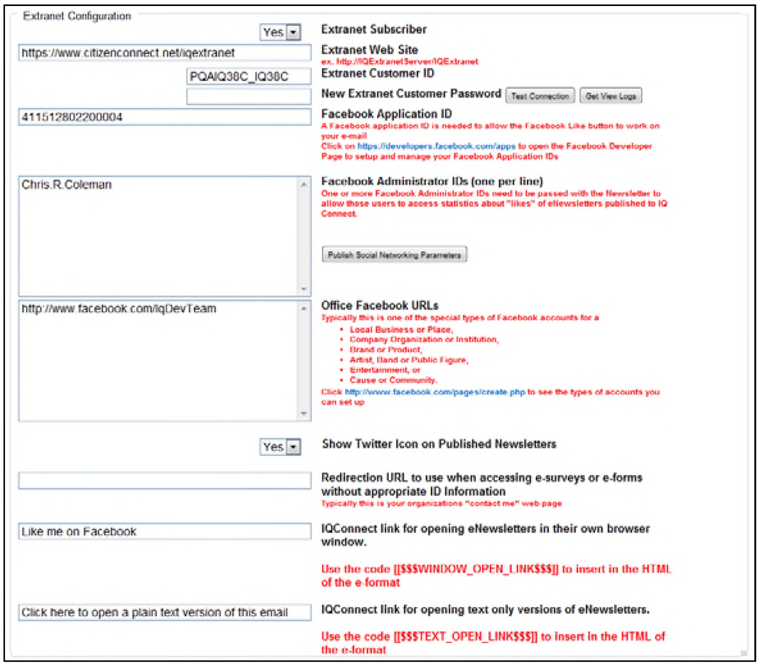
To Insert a Hyperlink:

1. Select the text or object that you want to set as a hyperlink.
2. Click the Hyperlink Manager icon. The *Hyperlink Manager* Dialog box appears.
3. In the URL field, enter the web address that you want the link to point to or from the *Existing Anchor* dropdown list, choose an anchor inserted in the current document.
4. (Optional)You can enter text in the *Link Text* field if you want to specify the text of the link, or just leave it at the default value.
5. (Optional) Select the type of link and target for the link.
6. (Optional) Enter a tooltip. This text will appear when the mouse cursor is placed over the link extension or image.
7. Click OK

Appendix B

Extranet Configuration

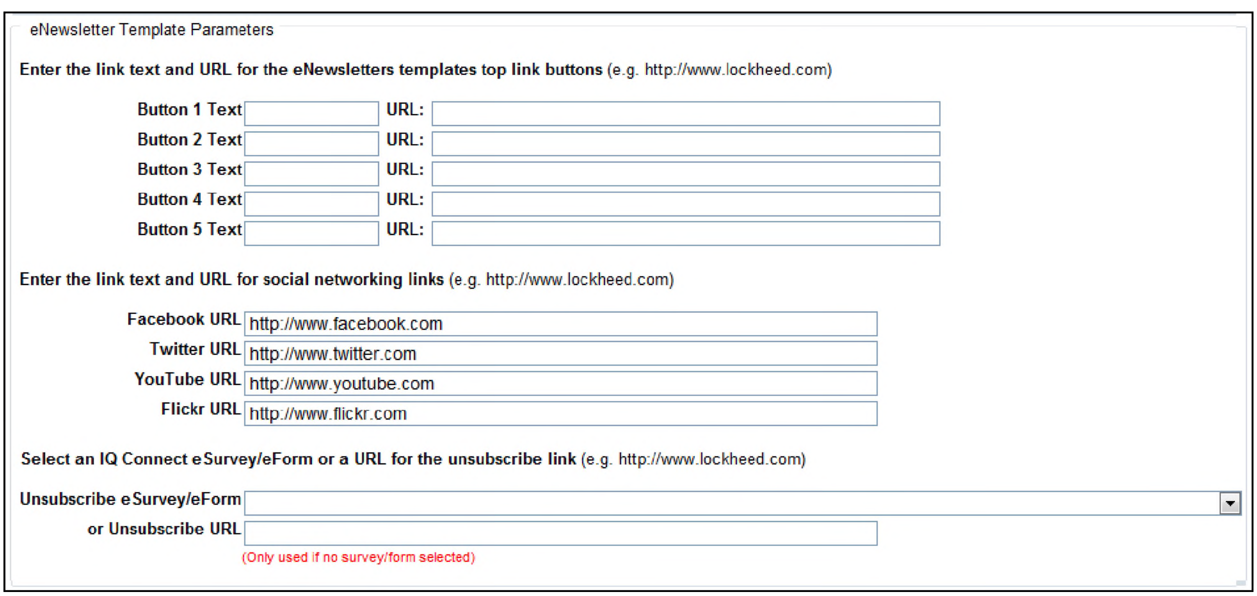
Once your office has purchased IQ Connect, you will be given a **Customer ID** and **Password**, which is entered in the corresponding fields in the **Extranet Configuration** sub-section in the System Configuration page. Communications between your IQ server and the extranet server are via authenticated web services running over an encrypted SSL connection. This web service allows your IQ server to retrieve weblog information and then update your local IQ database.



You will also need to enter information in the eNewsletter Template Parameters section if you wish to use the buttons embedded in a template. Enter the text of each button, and the URL to which you would like to link it. If you leave a button blank, it will not appear on the eNewsletter.

Enter your office Facebook, Twitter, YouTube, and/or Flickr page in the next section.

Enter either the eSurvey or eForm information for unsubscribe, or enter an unsubscribe URL if you do not use a Survey or Form.



To setup extranet configuration:

1. Click the Admin module tab and click the System submenu link.
2. Open the Customer Information and General Configuration section.
3. Click in the Extranet Subscriber field and select *Yes*.
4. Type the web site URL in the Extranet Web Site field.
5. Type your customer ID in the Extranet Customer ID field.
6. Type your password in the New Extranet Customer Password field.
7. Enter all appropriate information in the eNewsletter Parameters section.
8. Select the Save action.

Once the **Extranet Subscriber** switch is set to *Yes* and your customer ID and password have been entered, you can test the connection by clicking the **Test Connection** button.

The following settings also appear in System Configuration Settings for e-newsletters:

1) IQ Connect link for opening eNewsletters in their own browser window

2) IQ Connect link for opening text only versions of eNewsletters

These settings have the following default values:

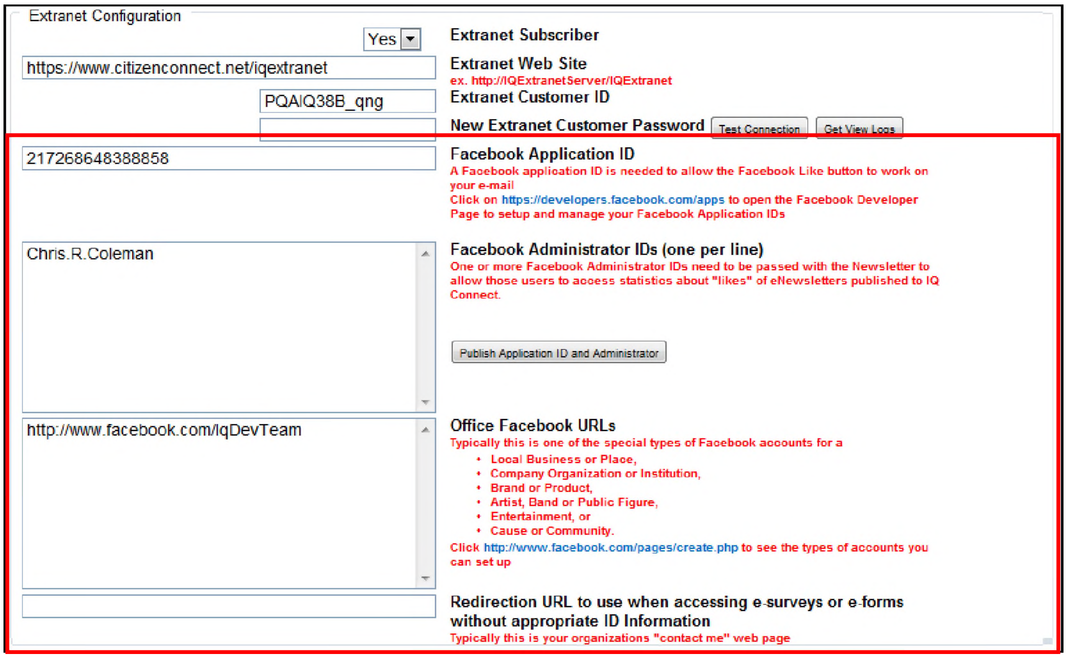
1) Click here to open this e-mail in its own browser window

2) Click here to open a plain text version of this email

You can replace the default values with your own text. IQ will automatically place the links at the top of the e-newsletter. Or you can control the placement of the links by inserting the merge codes [[$$$WINDOW_OPEN_LINK$$$]] and [[$$$TEXT_OPEN_LINK$$$]] in the e-newsletter.

Configuring eNewsletter Wizard for Facebook

If you wish to be able to post newsletters on your Facebook page, you will need to configure connection information. Once connected to Facebook, you are able to upload newsletters and view information regarding Likes, Shares and Views.

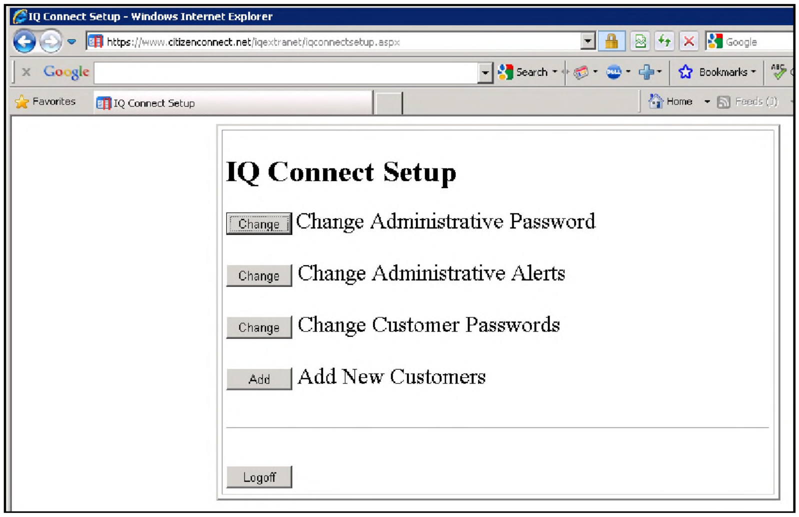


In the Admin panel, System submenu, you will find a section for Customer Information and General Configuration. In the Extranet Configuration section, you will enter the Facebook Application ID, which will point to the particular Facebook page to which you wish to post eNewsletters. Enter the email addresses of the Facebook Administrator, and the Office Facebook URL.

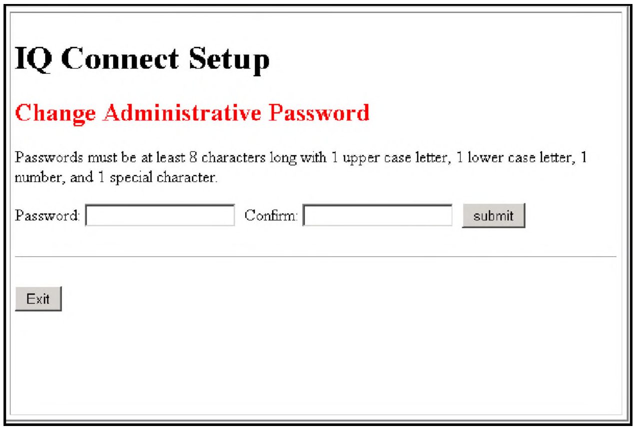
Appendix C

Administrative Updates

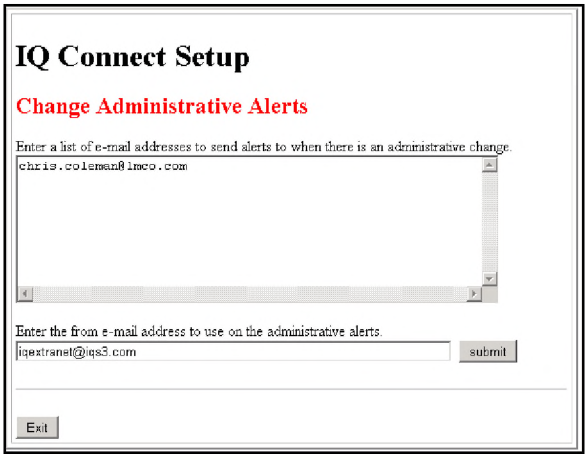
A web form has been created to allow administrators to change the Administrative password, Change Administrative Alerts, Change Customer Passwords and Add New Customers. To get access to this page, the user has to enter an administrative password.



The first function allows the Administrative Password to be reset. Enter the new password, confirm and submit.

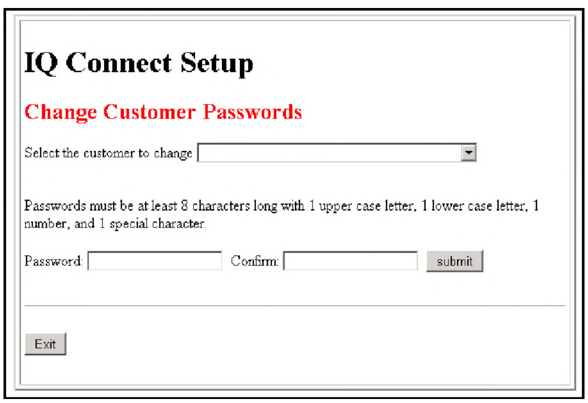


The function to Change Administrative Alerts allows an administrator to set up alerts to be sent to one or more email addresses if there is an administrative change to IQ Connect. Enter the list of email addresses to receive the alert in the first field and enter the email address from which the alert will be mailed in the second field. Submit when ready.

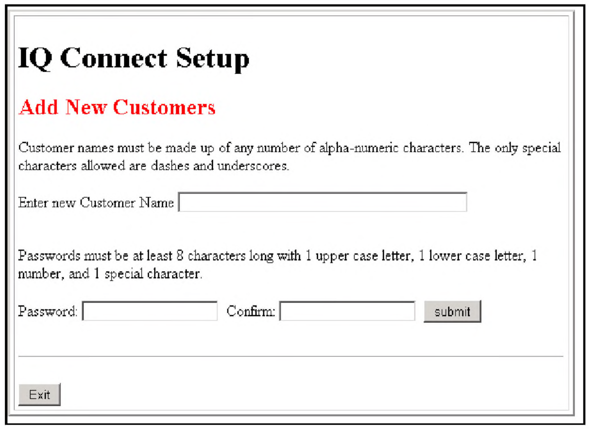


IQ will not check the format of the email addresses. The expectation is that the administrator will enter valid values in the email address fields.

The administrator may also reset passwords for existing customers. Passwords must conform to the setup rules. No two customers can share the same password.



An administrator may also set up a new customer from this web form. Enter the customer name and password, and confirm the password. Submit when complete.



IQ Connect Setup

Add New Customers

Customer names must be made up of any number of alpha-numeric characters. The only special characters allowed are dashes and underscores.

Enter new Customer Name

Passwords must be at least 8 characters long with 1 upper case letter, 1 lower case letter, 1 number, and 1 special character.

Password: Confirm: submit

Exit