Intranet Quorum® 3

Documents

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Notes

Introduction

The IQ Documents module lets you create and store documents for use throughout IQ. This includes the ability to create and manage form letters used for Mail and Set Entry, the ability to create and manage formats, and the ability to create and store documents not related to Mail.

Intended Audience

Most users will benefit from some understanding of the Documents module. System administrators, those responsible for approving and managing documents will benefit from understanding the advanced features of this module.

About Documents

Documents of all types may be maintained in the IQ Document module. These can include standard form letters, press documents, internal memos, boilerplate texts or other documents shared between users. The Document Directory allows you to use a familiar directory tree structure to view and organize your documents.

The IQ Mail module allows the use of standard form letters. These standard responses can be used exactly as written, customized with fill in the blank information that varies for each record, or they can be used as the basis for a customized letter. Form Letters can be used for printed correspondence or e-mail. Through Documents, you can create new form letters and new versions of existing form letters, search for form letters, copy, move, delete and archive form letters, change the status of form letters, and maintain letter and envelope formats. You'll use Word to create form letters through the Documents. Your form letters are automatically saved in .xml format. This allows for formatting both printed letters and e-mail messages.

Other office documents that you create locally on your workstation can be moved to the Documents module where they can be accessed by other IQ users.

You can limit the number of documents allowed by entering the number in the "Maximum number of Documents Allowed in the Document Library" setting in the System Configuration page. Once this limit has been reached, no new document records may be added.

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Understanding Different Types of Documents

Form Letters

Formats

Form Letter formats serve as the base documents from which other form letters are created. As the name implies, they contain information that determines how the letters will be formatted. This includes the Print Format and the E-mail Format. A format can be simple or complex, depending on the needs of your office. For example, a format may only contain Print Format information for paper selection and place holders for the date, address, salutation and closing. Or, it might contain no information for printing, but elaborate html formatting used for e-mail. It might contain both.

Envelopes

Like formats, envelopes are used to set the appearance and content of printed envelopes used with standard hard copy mail. Envelope records contain information on the size of the envelope and the merge fields used to pull address data from IQ People records.

Fill-in Letters

Fill-in letters are form letters that allow key information to be provided in the Mail record rather than as part of the document. For example, a particular letter may need to reference a unique request made by each recipient, but otherwise the rest of the letter is the same. A fill-in would allow you to enter the request made on a record by record basis as Mail is logged in without having to edit the letter directly.

Auto Letters

Auto Letters are letters that are automatically generated when the primary letter they are associated with is used in a Workflow record. For example, if a user sends a letter to an agency contact on behalf of the primary person in a Workflow record, an auto letter can be generated to inform the primary person that contact was initiated.

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Documents

Documents

Document records can be created for any type of asset your office needs to create and track. Typically, these are word processing documents that do not require merged data from People and Mail records. For example, you may track memos, policy briefs, press releases, speeches and other documents that require version control and approval in IQ.

Document records can also be created for other types of data. Spreadsheets, images, Power Point presentations and other data can also be tracked as document records. The important thing to remember is that for a user to check out or view a document, the application used to open the document must be installed on the user's workstation. IQ is simply the storage location for these documents, editing is handled by the workstation

Document Formats

Document formats are essentially templates you can use to create other documents. They may be simple or complex, containing anything from just the basic structure of a document to headers, footers, graphics and boilerplate text used in subsequent documents. Document Formats are different from Form Letter Formats in that that contain no merge fields – they are used to create documents that are not used to merge data from Mail or People records.

IQ User Preferences include preferences for formats used in Mail and when creating new Form Letters. If these fields are left blank, the user is prompted to select from available formats each time.

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Coding Documents

IQ provides Document, Issue, Workflow or Workflow Category codes to help organize documents for use.

Document Codes are available across all types of documents and provide a means of organizing documents independent of how they are used with other modules.

Issue Codes are used with Form Letters and with Mail records. Issue Codes allow you to filter letters in order to easily select the right response to incoming mail based on the Issue the correspondent is interested in.

Workflow Codes are used with Form Letters, Form Letter Formats and Documents to narrow results to specific documents when working with Workflow records. Workflow Codes facilitate filtering documents retrieved from within a Workflow record or Workflow-related Mail based on the codes used in the Workflow record.

Workflow Categories are similar to Workflow Codes, but allow Form Letters and Form Letter Formats a superstructure for related Workflow Codes. A form letter attached to a workflow *category* will be available when you create mail through a Workflow that contains any workflow *code* linked to that category. Workflow codes are linked to categories through the Category code file.

Each of these codes can be used as part of your search criteria when locating documents and can be updated from within the document record or en masse using the **Change Data** action discussed later.

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A word about Active X

The use of Active X is recommended for IQ workstations but not required. Active X controls are used to open, close and otherwise assist in the handoff of files from IQ to applications on the client workstation. Within the Documents module, Active X is used to automate the Check Out/Check In process. Without Active Scripting, the process is requires users to interact with upload/download dialogs to determine where the checked out file is saved.

Likewise, Active X is required for all scanning functions and for Printer Configuration.

Internet Explorer supports Active X, while Firefox, Chrom and other browsers do not. This should be carefully considered when choosing a browser for users managing Form Letters and other documents. Users can switch between browsers and all workstations do not have to be configured to use the same browser.

The following IQ Documents features are not available (or function differently without Active X):

1. Automated Check In and Check Out (functions differently without Active X0;
2. Scanning directly into IQ. You can, however, scan the document outside of IQ and then use the Upload option when creating a document to save the scanned file as an IQ Document.
3. The only Letter Printing option that works is “Microsoft Word via Download” as the others require ActiveX to drive Word.

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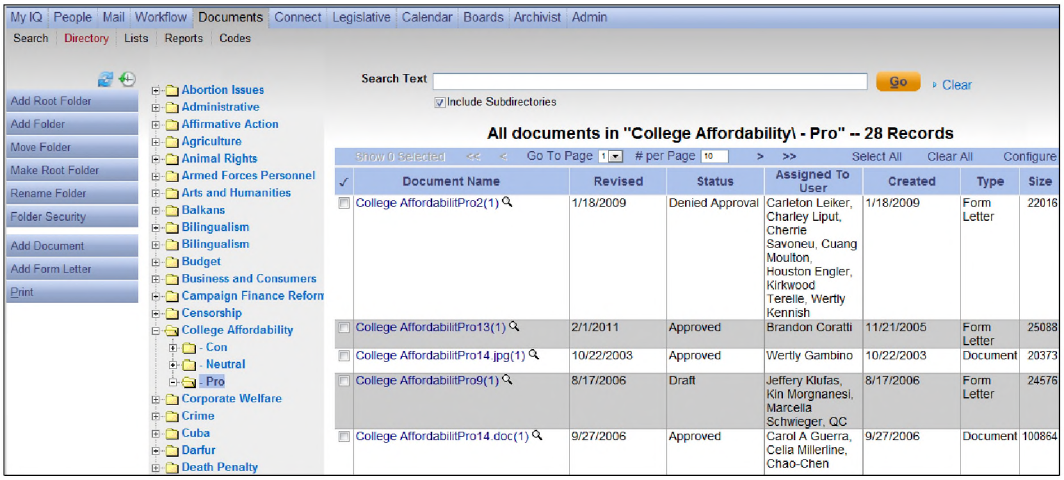
Notes

Storing Documents

Using the Document Directory

The IQ Documents module includes a directory feature that lets you organize your documents and form letters into folders and subfolders.



All documents can be placed in folders from the directory. Form letters can also be placed in the directory from the **Form Letter Record** page by entering the folder\subfolder name in the **Directory** field.

> It's important to remember to be concise when naming directories, because the directory location is used for viewing and selecting the document location throughout IQ. Excessively long or repetitive folder names can create unnecessary hurdles for users
>
> If you prefer using the Directory view as your primary means of finding and managing documents, you can set this as the default by selecting Directory in the Default Search drop-down in your Document Search Preferences.

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How to access the document directory:

1. Click the **Documents** tab and click the **Directory** submenu link. Folders and subfolders established for your office appear on the left side of the page. Click a folder to display subfolders or documents within it. Subfolders appear below the folder; documents appear on the right side of the page.

2. Click the document name link to go the record page for the document, or select the **Add Document** or **Add Form Letter** action to add a new document to IQ or create a new form letter.

   To create a root folder, select the **Add Root Folder** action.

   To create a subfolder, highlight the folder under which you want to place it and select the **Add Folder** action.

   To move a folder and all its contents (subfolders and documents) to another folder, highlight the folder and select the **Move Folder** action. Alternately, select the **Promote to Root Folder** option in the **To Folder** drop-down list on the **Move Folder** dialog to make the selected folder a root folder.

   To delete a folder, highlight it and select the **Remove Folder** action. This action is unavailable if there are documents in the folder. You must delete the documents or move them to another folder before you will be able to delete the folder.

   To rename a folder, highlight it and select the **Rename Folder** action.

   To move a document to a different folder, select the check box next to the document name, select the **Change Data** action and choose the target location from the **Directory** drop-down list. You can move multiple or all documents in a folder by selecting multiple check boxes or by clicking the **Select All** link.

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How to search the document directory:

1. Click the **Documents** tab and click the **Directory** submenu link.

2. Click the name link to open the folder or subfolder you want IQ to search.

3. Type the word or words in the **Search Text** field and click the **Go** button. IQ searches the current folder and subfolders for form letters or documents containing the word or words you searched and displays them below the **Search Text** field. To limit the search to just the selected folder, uncheck the **Include Subdirectories** box.

4. Click the **Clear** button to clear the search results and return back to the folder or subfolder.

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Directory Security

If Record Security is configured in your environment, it is possible set security at the Directory level. Directory security is inherited by new documents in the directory, and can be applied to any documents that already exist. Directory security controls a user's ability to browse directories in the Document Directory view, while security on the document controls user access directly to the document. So, if security on a particular document is more open than the security on the directory, a user can find and use that document in the search screens or from Mail, Workflow or other types of records. They are not, however, allowed access to browse the directory and folder location for that document.

Access Level Descriptions:

NONE	No access of any type will be provided to the Directory. Directory will not appear in the Document Directory view.
READ	The user will be able to view and use records in the directory.
USE	The user will be able to use the directory and add documents to it. Users with USE access to the directory will receive EDIT access to documents that inherit directory security (there is no USE security for document records).
EDIT	The user will be able to add documents and subdirectories to the directory and rename (but not move in the structure) the directory.
FULL	The user will be able to view, edit, move and delete the directory and adjust the associated record security.

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Notes

Adding a Document to IQ

You can store documents such as memos, images, reports, and press documents on your IQ database server so that they can be accessible to others. There you can organize them into folders and subfolders, and search for them using Quick or Advanced Document Search. IQ lets you upload documents that you've created on your workstation to the IQ database server. In addition, you can create new documents using a document format.

How to upload a document to IQ:

1. Click the **Documents** tab.
2. Select the **Add Document** action.
3. Search for and select the document you want to add by clicking the **Browse** button next to the **File Name** field.
4. The document name appears in the **New Document Name** field. You can use this as the document name, or you can change the name by retyping it. Note that Document names may not contain the following characters: ~!@#$%^&*()_+{}[]:;<>?or /.
5. Click in the **Directory** field and select a folder to place the document in a folder. The folder that appears in this field is the one set as the default in your user **Preferences**.
6. Click the Add button to upload the document to IQ.

Once you've moved the document to IQ, you can locate it through the Document Directory or by performing an Advanced Search.

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How to create a new Document from a Document Format:

1. Click the **Documents** tab.
2. Select the **Add Document** action.
3. Select the **Use Format** radio button.
4. Type the new document name in the **Document Name** field.
5. Click the search icon next to the **Format** field to search for and select a document format.
6. Click in the **Directory** field and select a folder to place the document in a folder. The folder that appears in this field is the one set as the default in your user Preferences.
7. Click the **Add** button to create the new document.
8. Complete the fields on the **Draft Document** page.
9. Select the **Save and Close** action to close the record.

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Scanning a Document in IQ

You can scan document into the IQ Documents module as well. In order to scan documents, you must have a scanner connected to your workstation. Scanning requires Active X and so is only available when using Internet Explorer as your browser. You must also have scanning enabled in your user Preferences in order to see the Scan option.

How to scan a document into IQ:

1. Select the **Add Document** action.
2. Click the **Scan** radio button located above the Document Name field.
3. Type a name for the scanned document in the **Document Name** field.
4. Click in the **Directory** field and select a folder to place the document in a folder.
5. Click the **Add** button.
6. Select the appropriate scanner and scanning options in the **Scan and Attach Document** dialog.
7. Click the **Start Scanning** button. IQ displays the message "Scanning and file processing in progress...please wait."
8. When the scan and OCR (if selected) are complete, IQ displays the Draft Document record page.
9. Select the **Save and Close** action to save the new document.

Documents can also be created from Attachments to a Workflow record. Information is available in the IQ Online Help.

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Adding a Form Letter to IQ

Adding a form letter to IQ is different than adding standard documents. Documents are created outside of IQ and uploaded into the database. Form letters and other types of documents that use IQ merge fields are created based on the formats that already exist within IQ.

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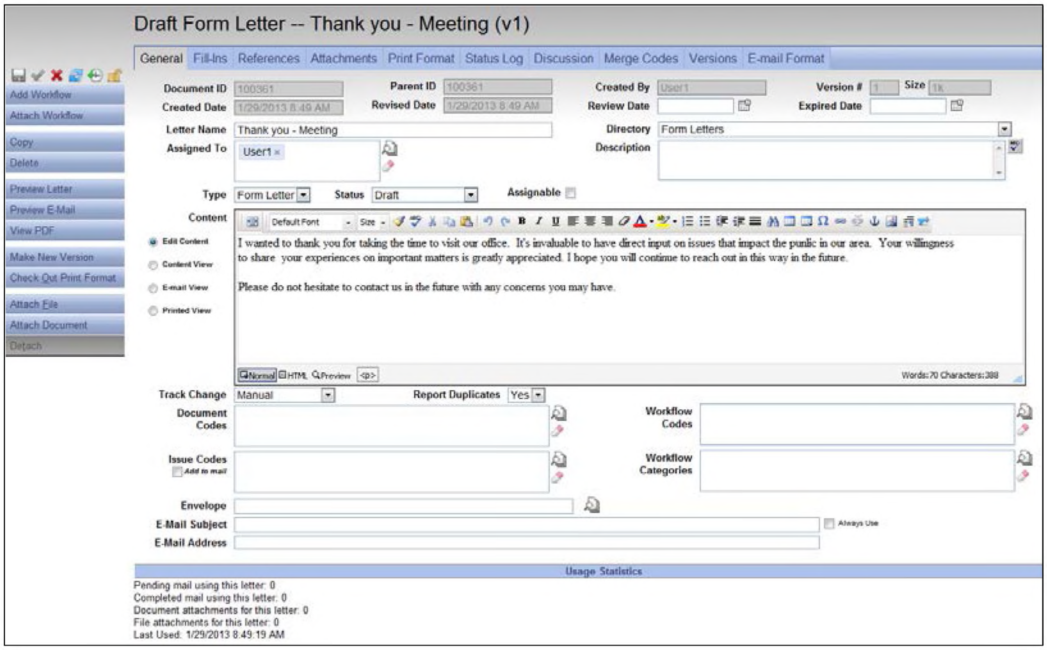
Notes

When you add a form letter, the Form Letter record window for your new form letter will open. Type a description and complete other information for the new form letter; and click into the content frame to create edit the text of the letter itself.



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How to create a form letter:

1. Select the **Add Form Letter** action.

2. Type the name of the new form letter in the **Form Letter Name** field. Use your office standard for naming the letter; a file extension is not required. Form Letter Names may not contain the following characters: ~!@#$%^&*()_+{}[]:;<>?or /. Note that the letter name can be changed depending on the status of the letter and your user security.

3. Verify that the **Form Letter** option is selected for **Type**.

4. Click in the **Directory** field and select a folder to place the letter in that folder. The folder that appears in this field is the one set as the default in your user **Preferences**.

5. Click the link for the desired format in the **Format** field. The format selected as your Default Form Letter Format in user preferences is automatically selected.

6. Click the **Add** button.

7. Complete fields on the Form Letter page.

8. Type the body of your letter in the HTML Editor in the Content iframe and click the Save icon when you have finished.

9. If you are going to use this letter to send outgoing e-mail, e-newsletters or e-surveys, click the E-Mail View radio button to view the letter in e-mail format. Users with access to modify E-mail Formats can make format adjustments on the **E-Mail Format** tab.

10. If you are going to use this letter to send outgoing printed mail, click the Printed View radio button to view the letter in Print Format. Make adjustments by checking out the **Print Format** for editing in Word.

11. Select the **Preview Letter** or **Preview Email** actions if you would like to see what the letter will look like when it's merged with a name and address. If the letter will be sent as e-mail, you will want to make sure format information on the E-Format panel is correct.

12. Select the **Close** action to close the Form Letter record.

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Notes

If your User ID security permits it, you can set record security for a document, form letter or format by selecting the **Record Security** action on the Form Letter page. This lets you access to Full, Edit, Read, or None, to all or selected users. Whenever record security is set or changed for a form letter, a notation is placed on the **Status Log** panel that shows the date, time, and user who changed the security.

The allowed **Size** for letters and their associated attachments is set by your system administrator. If the combined size of the letter and attachments exceeds that threshold, you will receive a warning when accessing the record or when the letter is used in a Mail record.

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Document Record Pages

Information about new and existing form letters is recorded on the **Document** or **Form Letter Record** page. The name and version number appear in the page title. This page provides fields for all information about the record, including codes and dates.

Form Letter Record Page

A form letter record contains the following panels: **General**, **Fill-Ins**, **References**, **Attachments**, **Print Format**, **Status Log**, **Discussion**, **Merge Codes**, **Versions**, and **E-mail Format**. These panels let you view merge fields, references, attachments, text, a log of all actions taken for the letter and information on all versions of the letter.

General Panel

The **General** panel, pictured above, provides fields for editing content, and for entering staff, dates, codes, and other information. It also shows **Usage Statistics**—the date the letter was last used in Mail and numbers for pending and completed records to which the letter was assigned.

Actions for this panel let you copy, delete, and view the letter, attach files and documents, make a new version of the letter, preview letter or e-mail and view all pending mail to which this letter has been assigned. Actions are also available that let you check the Print Format out of and back into IQ.

Fields on the General panel include: **Document ID, Parent ID, Created By, Version #**, **Size**, **Created Date**, **Revised Date**, **Review Date**, **Expired Date**, **Letter Name**, **Directory**, **Assigned To**, **Description, Type**, **Status**, **Assignable**, Content, buttons for different **view modes**, **Track Change**, **Report Duplicates**, **Document Codes**, **Issue Codes**, **Workflow Codes**, **Workflow Categories, Envelope, Offsite Printing (if applicable), E-Mail Subject**, and **E-Mail Address**. Information is entered automatically in the **Document ID, Parent ID, Created By, Version #, Created Date,** and **Revised Date** fields and cannot be changed. **Letter Name** is populated from the name entered in the **Add Form Letter** page, and can be changed depending on its **Status** and your user security.

Review Date

If you routinely review letters to ensure that they remain up to date, type the date on which the letter is due to be reviewed. Or, click the calendar icon next to this field and select a date there. The date must be after the current date. You can enter a time in the field next to the **Review Date** field. If you don't enter a time, the field is automatically populated with 12:00 AM when you save the record. Optionally, you can type +*nn* in this field to change the date to *nn* days from the current date.

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Notes

> IQ can be configured to automatically return documents to a *Draft* or *Request Approval* status when the **Review Date** passes. Likewise, the *Assignable* status can be changed so that Form Letters are not available to be assigned to Mail records until they have been reviewed. Contact your ITC for more information on configuring these options.

Expired Date

Type the date on which the letter is set to expire. An expiration date is useful when you know a letter will no longer be valid at a certain point in time. The date must be after the current date.

> IQ can be configured to automatically change documents to *Draft* or *Inactive* status when the **Expired Date** passes. Likewise, the *Assignable* status can be changed so that Form Letters are not available to be assigned to Mail records until they have been reviewed. Contact your ITC for more information on configuring these options.

Letter Name

Type the name of the form letter in the Letter Name field. Use your office standard for naming the letter; a file extension is not required. The Letter Name can be changed depending on the Status of the letter and your user security. Form Letter Names may not, however, contain the following characters: ~!@#$%^&*()_+{}[]:;<>?or /.

Directory

The folder you selected when you created the letter appears in this field. If you didn't select a folder or if you want to change it, click in the field and select a folder from the list.

Assigned To

Your user name appears in this field when you add a new document or letter. You can search for existing records based on this information, and links to letters that you create appear in the documents section of My Work. You can change the **Assigned To** users by clicking the search icon next to the field and selecting a different or additional user(s).

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Notes

Description

This optional field lets you save information about the letter you're creating. Information entered into this field is displayed in the **Description** column on the **Documents** panel when the document is attached to a Workflow record. 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 spell-check text entered into this field by clicking the spell check icon next to the field.

Type

There are five available Type values: *Document*, *Document Format*, *Form Letter*, *Format*, and *Envelope*. The values displayed within a given record are determined by the type selected when the record was created. It is possible to switch between *Form Letter* and *Form Letter Format* or between *Document* and *Document Format*. For *Envelopes*, this value cannot be changed.

Status

The default status of a new record is *Draft*. Draft letters are available to assign to mail only if you select the **Assignable** check box. Additional form letter statuses are *Approved*, *Inactive*, and if you use the form letter approval process, *Request Approval* and *Denied Approval*.

Assignable

When a letter is marked *Assignable*, it is available in the **Select Letter from All Possible Form Letters** dialog used in Mail, Sets and Workflow-related Mail. A letter that is assignable can be used in Mail records in order to facilitate data entry even as a letter awaits review and approval. Mail using form letters cannot be printed or e-mailed until the letter is marked *Approved*. Likewise, Form Letters that have Document attachments are not able to be printed or e-mailed until both the Form Letter and the Document are marked approved. IQ automatically marks the record *Assignable* if it isn't when the **Status** is set to *Approved*. Records with a status of *Draft*, *Request Approval* and *Denied Approval* can also be marked *Assignable*. The **Assignable** checkbox cannot be cleared for *Approved* letters.

Content and View modes

This scrollable iframe displays the contents of the letter. For a new form letter, in a **Status** of *Draft*, you can select *Edit Content* and type the contents of the letter in the HTML editor. Other view modes allow you to display only the body of the letter (*Content View*), the content together with the E-mail Format (*E-Mail View*) or the body together with the Print Format (*Print View*).

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Notes

Track Change

This field allows you to control whether or not Microsoft Word's Track Changes option is automatically turned on or off each time you check out the Print Format of you letter. Select *Manual* if you would like to manually turn track changes on and off from within Microsoft Word each time you check out the Print Format. If you select this option, track changes will remain in whatever state it was in when the letter was last saved.

Report Duplicates

This field allows you indicate whether or not you would like IQ to alert users when this form letter is selected for a People record that has previously received this letter. The default setting is *Yes*, which means that IQ will display the duplicate letter warning message. Select *No* if you do not want IQ to display the duplicate letter warning message for this form letter.

Document Codes

To attach a document code to a record, enter it in the **Document Codes** field by typing it or clicking the search icon next to the field to display a dialog list box and selecting a code from the list. You can search for existing documents and form letters based on document codes.

Issue Codes

To attach an issue code, enter it in the **Issue Codes** field by typing it or clicking the search icon next to the field to display a dialog list box and selecting a code from the list. You can search for existing records based on issue codes.

When you attach an issue code to a form letter, that letter appears in the list of available letters when you create mail using that issue code. Select the **Add to Mail** check box if you would like IQ to automatically assign the selected Issue Codes to the Mail record when this letter is selected.

When you add Issue Codes to a format, records created using that format automatically inherit the codes.

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Workflow Codes

To attach a workflow code, enter it in the **Workflow Codes** field by typing it or clicking the search icon to display a dialog list box and selecting a code from the list. It is necessary to assign a workflow code only if you will be using the record in processing workflow records. When you attach a workflow code to a form letter, that letter appears in the list of available letters when you create mail through a Workflow with that workflow code. Similarly, when you add a Workflow Code to a format, those formats are available when the **Attach New Form Letter** action is selected from a Workflow record. If you choose not to assign a workflow code, you may do so later in the document record or by using the **Change Data** action in the Documents search results or Directory grids. You can search for existing form letters based on workflow codes.

Workflow Categories

To attach a workflow category, enter it in the **Workflow Categories** field by typing it or clicking the search icon to display a dialog list box and selecting a code from the list. A form letter attached to a workflow *category* will be available when you create mail through a Workflow that contains any workflow *code* linked to that category. Workflow codes are linked to categories through the Category code file. If you choose not to assign a workflow category when you create the form letter, you may do so later through the document record or by using the **Change Data** action in the Documents search results or Directory grids. You can search for existing form letters based on workflow categories.

Envelope

The envelope format you enter in this field will appear automatically in the **Envelope** field when you send this form letter. Click the search icon next to this field and select an envelope format from the dialog list box. If you don't assign an envelope to a form letter, and if you don't select one at print time, the default envelope that's set in your user **Preferences** is used if you print an envelope for a letter.

E-Mail Subject

This field allows you to associate a specific e-mail subject for a form letter. This subject is used when the form letter is selected in outgoing mail records that do not already have an outgoing e-mail subject. Select the **Always Use** checkbox, located next to this field, if you would like IQ to use the form letter **E-Mail Subject** in place of the standard **Office Defined or "RE: Subject of Incoming E-mail"** for mail records that are created by IMA. Selecting **Always Use** will also over-ride the outgoing e-mail subject in existing mail records in which the form letter is selected or assigned.

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Notes

E-Mail Address

This field allows you to associate a specific e-mail address for a form letter. When an e-mail address is selected in this field, it appears in the From field in the Mail record page when the form letter is selected.

> This field is editable only for users with Mail Security Lock #51- *Allow changes to the From Address of E-mail* granted.

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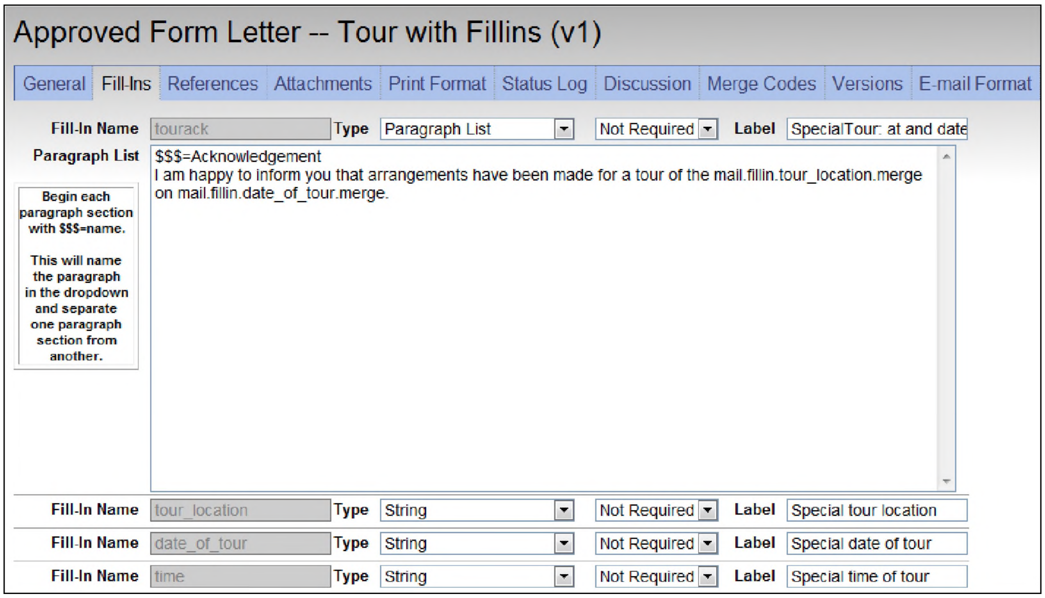
Fill-Ins Panel

Fields on this panel allow you to create labels for fill-ins that you've placed in a form letter. Each fill-in field in the text of the letter will appear on the Fill-Ins panel.



Fill-In Name

IQ automatically assigns a name of field_# (i.e. field_1, field_2, etc.) for each new fill-in that is added to the form letter. This name is stored in the database, but is not displayed in the Mail record when the letter is selected. The value entered in the **Label** field appears in the Mail record.

Fill-In Type

The **Type** field on the Fill-Ins panel lets you set specifications for the fill-in field that appears on the Mail Record page when you send the form letter. Use the **Type** field if you want to define the type of data that users can enter in the fill-in field. Enter one of six types—**String**, **Date**, **Number**, **Body Text**, **Drop-Down List** or **Paragraph List**—by typing the first character of the type or by clicking in the field and selecting a type from the list that appears.

String or String (no Spell Check) – use this type when users will enter text or alphanumeric information in the field.

Date – use this type when users will enter a date in the fill-in field. When you select this type, a calendar icon appears next to the fill-in field for selection of a date in the Mail record page.

Notes

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Notes

Number – use this type when users will enter numeric characters only in the fill-in field.

Body Text – use this type when users will enter a paragraph or other large amounts of text. A body text field provides a scroll bar and spell checking capabilities.

Drop Down List – use this type when users need to select from a list of values in a drop-down list. Type the drop-down list value and its translation in the format Code=Translation. For example, if you enter A=Air Force Academy and N=Naval Academy, you can simply type A or N in the fill-in field and the translation Air Force Academy or Naval Academy will appear in the letter. Type each code and translation on a separate line. If the code and translation are the same or you don't need the ability to type just the code in the fill-in field, then only enter the translation, for example Naval Academy, without the code (N) and equal sign (=).

Paragraph List – use this type when users need to select from a list of paragraph values in a drop-down list. Begin each paragraph section with $$$=name. This will name the paragraph in the drop-down and separate one paragraph section from another. You may include additional fill-in merge fields in the paragraph text.

Required or Not Required

By default, all fill-in fields are required to be completed when the letter is selected in the Mail record. Click in this drop-down and select *Not Required* if you do not want a fill-in to be a required field in the Mail record.

Fill-In Label

The **Label** field on the Fill-Ins panel lets you identify the field label that appears in the Mail Record page when you send this letter to someone. If you don't enter a label, the word you used in the fill-in merge code appears (for example, "problem" for *mail.fillin.problem.merge*). A label lets you provide more information to the person sending the letter. For example, instead of "Problem," you could prompt with "Type the nature of the problem in fewer than four sentences."

Copy and Enclosure Fill-Ins

You can use fill-in fields as a way to include copy and enclosure notations in a letter. Simply insert a copy and enclosure fill-in at the bottom of the letter. Whenever you send the letter, **Copy** and **Enclosure** fields appear on the Mail Record page. If there are no copy or enclosure notations for the letter, simply leave these fields blank.

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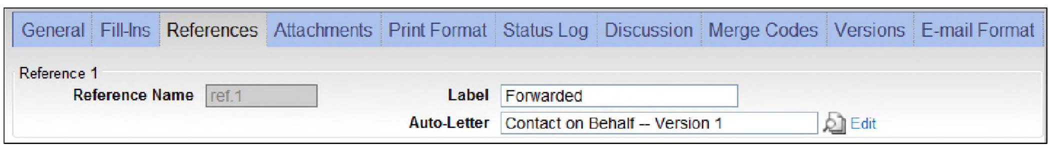
Notes

It's important to remember when using these fields to include the copy and enclosure notation as part of the value you enter in the field. For example, you should enter Copy: John Smith, cc: John Smith, or Courtesy Copy: John Smith in the Copy field. In the Enclosure field, you should enter Enclosure, Enclosures, Enclosures - 3, Enc., and so forth. The format of your entry in these fields is determined by your office standard for presenting this type of information in letters.

The **Rearrange Fill-In Fields** action allows you to change the order in which the fill-in fields appear on the Mail Record page.

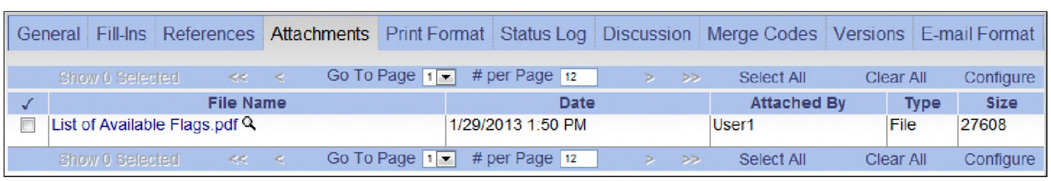
References Panel

If you've added reference merge codes to a form letter, they appear on the **References** panel. You can add an identifying label to assist with selecting the correct People record when the letter is sent through workflow. Up to 20 references can be added to a single letter.



Attachments Panel

The Attachments panel lists any files that are attached to the form letter and provides actions that let you attach and detach files and documents.



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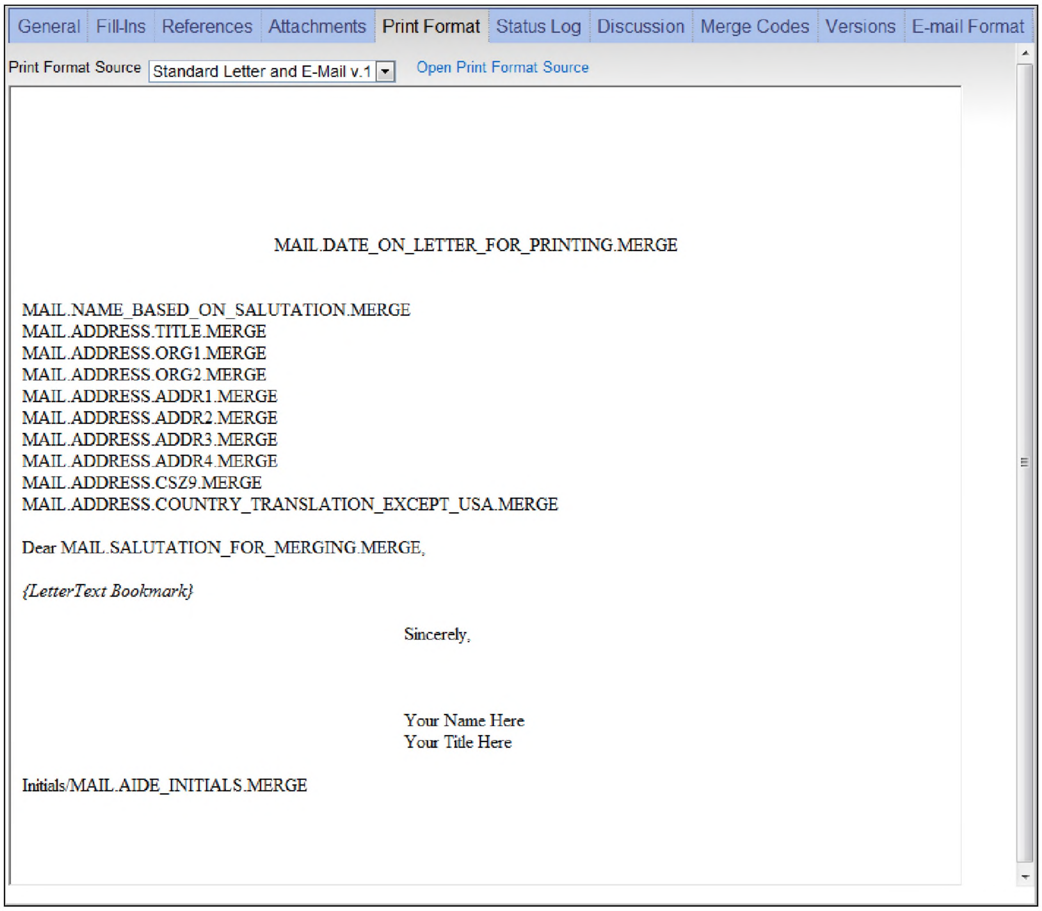
Notes

Print Format Panel

The **Print Format** panel displays the currently selected print format with all of the merge codes for letter date, name, address, salutation and the closing (i.e. signature block). You can select another print format, by clicking in the **Print Format Source** field and selecting one from the list.



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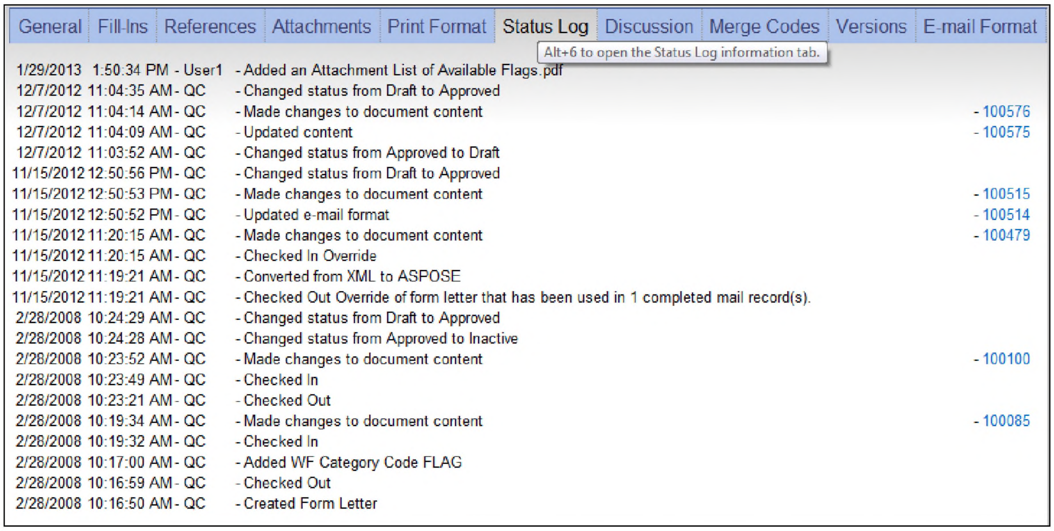
Notes

Status Log Panel

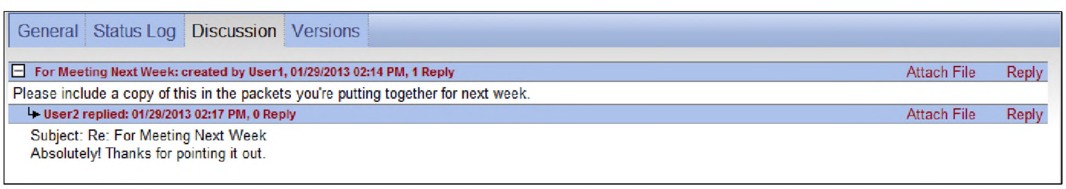
The **Status Log** panel shows all actions taken on this record over time, including the date, time, and user who performed the action.



The log shows when the letter was checked out and checked in, files that were attached and detached, and changes to the status. Whenever record security is set or changed for a form letter, a notation is placed on the **Status Log** panel that shows the date, time, and user who changed the security.

Discussion Panel

The **Discussion** panel contains a discussion topic tree with topics and their associated replies.



Select the **New Topic** action to add a new topic. The subject of each topic is highlighted in blue and the subjects of the associated replies are slightly indented below each topic.

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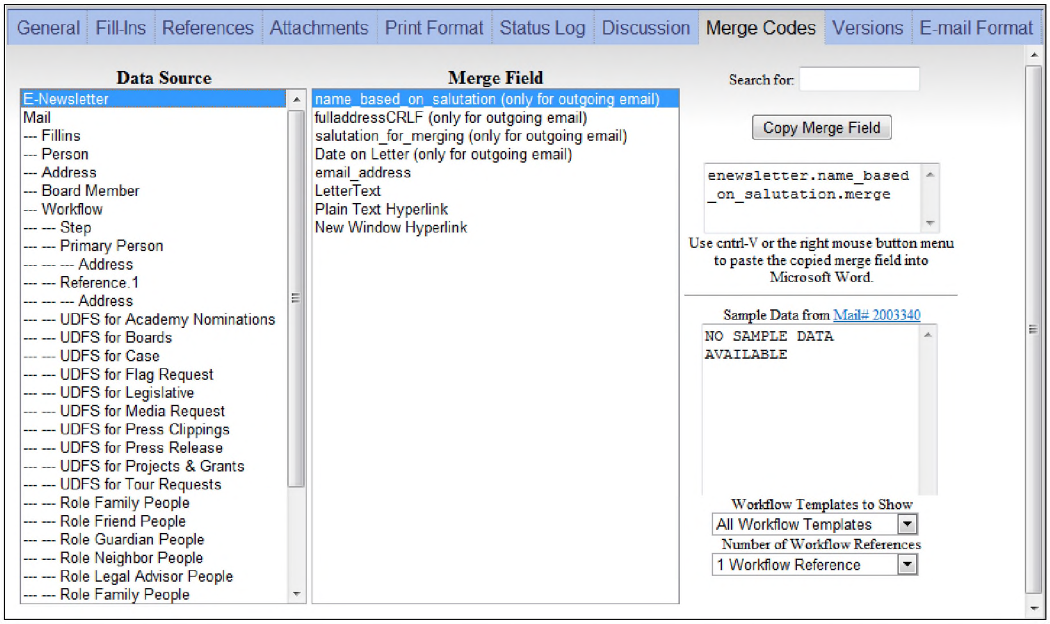
Notes

Merge Codes Panel

The **Merge Codes** panel appears for Form Letters, Formats and Envelope records. It allows you to find all possible merge codes, including data fields and custom fields. In addition, sample data is displayed for most fields based on the last mail record that you were in during the current login session. If you have not accessed a mail record, then IQ will display data from a randomly selected mail record.



The **Data Source** column displays the available sources of data in IQ records. Selecting an item in the **Data Source** column displays the available merge fields from that Data Source in the **Merge Field** column. For example, if you select *Workflow* in the **Data Source** column and *Comments* in the **Merge Field** column, then the name of the merge field (*mail.wf.Comments.merge*) will appear in the field below the **Copy Merge Field** button. In addition, sample data for that merge field is displayed in the **Sample Data** field.

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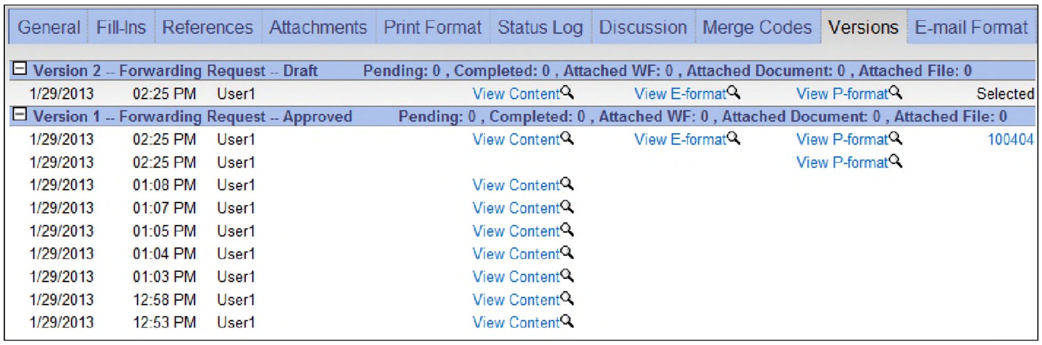
Versions Panel

The **Versions** panel displays complete version history of the document including each version, the usage statistics for each version, links to view any version and revision history for each version.


General | Fill-Ins | References | Attachments | Print Format | Status Log | Discussion | Merge Codes | Versions | E-mail Format

⊟ Version 2 -- Forwarding Request -- Draft			Pending: 0 , Completed: 0 , Attached WF: 0 , Attached Document: 0 , Attached File: 0			
1/29/2013	02:25 PM	User1	View Content	View E-format	View P-format	Selected
⊟ Version 1 -- Forwarding Request -- Approved			Pending: 0 , Completed: 0 , Attached WF: 0 , Attached Document: 0 , Attached File: 0			
1/29/2013	02:25 PM	User1	View Content	View E-format	View P-format	100404
1/29/2013	02:25 PM	User1			View P-format	
1/29/2013	01:08 PM	User1	View Content			
1/29/2013	01:07 PM	User1	View Content			
1/29/2013	01:05 PM	User1	View Content			
1/29/2013	01:04 PM	User1	View Content			
1/29/2013	01:03 PM	User1	View Content			
1/29/2013	12:58 PM	User1	View Content			
1/29/2013	12:53 PM	User1	View Content			

The **Promote** links allow revisions of a version to be promoted to replace the current version (identified with the label *Selected)*. ID links also appear for each version of the document. Revisions are shown for the document with a date-specific links to View Content. For Form Letters, each part of the document – the content, Print Format and E-Mail Format – displays these revision links. This allows easy access to any version of the record across all edits. The magnifying glass icon allows versions and revisions of the document to be opened for viewing.

Actions on this panel in a Form Letter record include: **Check In/Out Print Format**; **Upload Print Format Changes**; **Edit Checked Out Print Format** and **Undo Check Out**.

Notes

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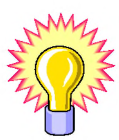
Notes

E-Mail Format

The **E-Mail Format** panel contains HTML information used to format outbound email for this letter. This HTML is inherited from the Form Letter Format used to create the letter and may be changed within the panel or by using the **Update E-Format** action. It allows users with appropriate security to customize the appearance of outgoing e-mails that use this form letter.

A letter with no e-format defined will show only [[$$$LetterText$$$]], which is the merge field that allows the text of the letter to be inserted in e-mail messages.

The editor allows you to view and edit the HTML in a WYSIWYG (what you see is what you get) format directly within the record page and to post images used for e-formats to the IQ Connect Extranet.



Training is available for IQ Connect. Contact your Lockheed Martin ITC for additional information, to schedule training or for assistance with creating an e-format.

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Notes

Document Record Page

The Document record page is substantially similar to the Form Letter record page, but with a limited set of tabs that reflect the different way these records are used.

The document name and version number appear in the page title. If your IQ database is setup for archiving and the document has been archived, the page title will contain *Archived*. This page provides fields for all information about the document, including codes and dates. A document record contains the following panels: **General**, **Status Log**, **Discussion** and **Versions**. Document records do not include **Fill-ins**, **References**, **Attachment**, **Print Format**, **Merge Codes** or **E-mail Format** tabs.

Functionally the tabs of a Document record parallel the tabs in a Form Letter record with one important difference: The **General tab** of a document does not include a section for viewing or editing the contents of the document. Because Document records with a **Type** of *Document* can be used to store content of any type (word processing, graphics, presentations, spreadsheets, etc.), the document must always be opened in the application specifically for its content.

The following actions are available on all four panels in the Document record **Upload New Version**, **Make New Version**, **Check Out Document**, **Upload Document Changes**, **Edit Checked Out Document**, **Undo Check Out**, and **Check In Document**.

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Notes

Inserting Merge Codes in a Letter

Merge codes let you merge field data from People, Mail, and Workflow records into a letter. When you print the letter, the People, Mail, and Workflow record for each person to whom the letter is going are checked, and the contents of the fields are merged into the letter.

How to add merge codes to a form letter:

1. Create the form letter using the **Add Form Letter** action.

2. In the content text, click where you want to place the merge code and type it. For example, to merge the person's first name into the body of the text, you would use *mail.person.first.merge*. To merge the person's city into the body of the letter, you would use *mail.address.city.merge*.

   Note: You can view, copy and select merge codes on the Merge Codes panel of the Form Letter record page. After you select the merge code, click the **Copy Merge Field** button and then use **Ctrl-V** (or the right-mouse click) to paste it into the content of the letter.

3. Merge fields for address information or other items that would typically appear in printed mail, but not in e-mail, can go into the **Print Format**.

   - Click the ***Check Out Print Format*** action to open the document for editing on your workstation.
   - Type or paste the merge code in the format as described above.
   - Save and close the Print Format in Word.
   - Return to the **Form Letter** page.
   - Click the ***Check In Print Format*** action to save changes to IQ.

4. Select the **Save and Close** action close the form letter record.

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Notes

Once you have placed merge codes in a form letter and used that letter in correspondence, you should not delete or add new merge codes. This might cause problems if you reprint a letter previously sent to a correspondent that has new or missing merge codes. If you want a version of the letter without or with different merge codes, you should make a new version of it.

E-Newsletter Fields

E-newsletter fields are available for the creation of e-mail newsletters. These include basic salutation and address information that will be merged into e-mail messages for recipients of the newsletter. IQ Connect is available for offices interested in maximizing e-newsletter contact with constituents. It includes tracking of e-mail receipt and survey functionality. Separate training is available for this feature.

Mail Data Fields

Top level merge fields are available for information contained within the Mail record. These may include information on when the correspondence was received, how it was processed in your office (batch and approval information, for example) and user information (information about the *Assigned to* and *Approval* users).

Workflow Data Fields as Merge Codes

If you're creating a letter that will be used with workflow, you can merge information from a workflow record. A letter can only be sent through workflow when it has a workflow code attached to it. When you assign a code to a workflow, all letters with the same workflow code will be available to send through the workflow. You can merge standard workflow fields or user-defined, template-specific data fields, called UDFs. An example of a data field merge code would be *mail.wf.udf.xxx.merge*, where *xxx* is the name of the UDF you want to merge. For example, if a workflow template has a data field for Social Security Number and its field name is SSN, you can merge the correspondent's Social Security number into a form letter by using a merge code called *mail.wf.udf.SSN.merge*. Note that you must use the data field's **Field Name**, which can be found on the **Data Fields** panel of the Workflow Template record. The **Field Name** is case sensitive when used in the merge code (*mail.wf.udf.xxx.merge*).

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Notes

Custom Fields as Merge Codes

You can use custom fields (People and Address) as merge codes in a letter. If the letter is sent through workflow, you can merge custom People and/or Address fields for the Primary Person and/or a Reference. The format for the merge code for custom fields includes the ID# of the custom field. For example, if your IQ database contains a custom People field called Voter Identification and its ID# is 48, then the merge code would be *mail.person.custom.48.merge*. If you wanted to use the Voter Identification custom field of the Primary Person in a workflow letter, the merge code would be *mail.wf.primary.custom.48.merge*. In addition, you could use the Voter Identification of the Reference in a workflow letter with a merge code of *mail.ref.1.custom.48.merge*. Note: The formats for merge codes for custom address fields are: *mail.address.custom.xx.merge*, *mail.wf.primary.address.custom.xx.merge* or *mail.ref.x.address.custom.xx.merge*

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Notes

Inserting References in a Letter

References are available when sending mail through Workflow. They let you refer to field information in a People or Agency Contact record that is attached to the Workflow. For example, you can use references in letters to agencies when you want to refer to the name, address, or other information in the record of the person on whose behalf you're writing. There is no limit to the number of references you can place in a letter.

How to add a reference to a letter:

1. Create the form letter using the **Add Form Letter** action.
2. In the content text, click where you want the reference to appear and type the reference merge field using the following format: *mail.ref.1.xxxxx.merge*, where *xxxxx* is the name of the field you want to merge. For example, to merge the name from a People record into the body of the text, you would type *mail.ref.1.fullname.merge*. To merge the city from a People record, you would type *mail.ref.1.address.city.merge*. If you're referencing a second person, the merge code would be *mail.ref.2.fullname.merge*. Click the **Merge Codes** tab on the **Form Letter** page to view a list of all available merge codes, and to copy the specific ones you need into your letter.
3. When you've finished, click the **References** tab to create a label for the reference. The label appears when the letter is selected in a mail record to help the sender of the letter decide which People record to pick when choosing the references for a letter. Examples of labels might be Attorney, Personal Reference, Agency Contact, and so forth. Adding a label is optional.
4. Select the **Save and Close** action to close the form letter record.

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Notes

Creating a Fill-in Form Letter

Inserting Fill-Ins in a Letter

Some form letters use *fill-ins*—merge fields that let you enter specific information to customize an instance of a form letter. For example, if you were sending a letter to acknowledge a request for assistance with a problem, the letter might reference the problem, the agency you will contact, and the name and telephone number of the staff person working on the request. When you're preparing correspondence and using a form letter that has fill-ins, **Fill-In** fields appear for you to complete.

How to add fill-in merge fields to a form letter:

1. Create the form letter using the **Add Form Letter** action.
2. In the content text, click where you want fill-in data to appear and type the fill-in merge field using this format: *mail.fillin.xxxxx.merge*, where *xxxxx* is the name you want to give to the fill-in field. For example, to provide for an entry referencing a problem or request, you would type *mail.fillin.problem.merg*e or *mail.fillin.request.merge*. To provide for entry of the agency you plan to contact, you would type *mail.fillin.agency.merge*. When you've finished with the letter, close and save it to return to the Form Letter page. Click the Merge Codes tab on the **Form Letter** page to copy fill-in information into your letter.
3. Click the **Fill-Ins** tab. The names of all fill-in fields you entered in the letter text appear on the **Fill-Ins** panel. You can enter a field label for each fill-in and identify fill-in fields as specific types in order ensure consistent entry of information in them.
4. Select the **Save and Close** action to close the form letter record.

References and Fill-ins can also be added to the Print Format of a letter using the same steps given for adding Merge Fields to a Print Format.

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There is no limit to the number of fill-ins you can place in a letter. However, there is a 2,000 character limit to the amount of data that can be entered in a fill-in field. Fill-in information is truncated at 2,000 characters, and you are informed as to the number of characters that were cut.

To remove a fill-in from a letter, delete the fill-in code from the text or format. When you save letter or check the format back in, the **Fill-Ins** panel is updated to reflect the removal of the fill-in code. **Note:** Fill-Ins should not be removed from a Form Letter if it has been used in a Mail record.

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Notes

Creating Formats

Formats are essentially templates you can use to create other documents. They may be simple or complex, containing anything from just the basic structure of a document to headers, footers, graphics and boilerplate text used in the documents they are used to create.

Formats make it easy to create standard, professional documents. IQ allows you to create formats for documents, form letters and envelopes..

How to create a document format:

1. Click the **Documents** tab.
2. Select the **Add Document** action.
3. Search for and select a local file you want to use as a document format by clicking the **Browse** button next to the **File Name** field.
4. The selected document format appears in the **Document Name** field. You can use this name for the document format in IQ, or you can change the name by retyping it.
5. Click in the **Directory** field and select a folder to place the format in a folder.
6. Click the **Add** button.
7. Click in the **Type** field and select **Document Format**.
8. If necessary, check out the document and make changes or updates using the standard Check Out process.
9. Complete the remaining fields on the **Draft Document** page. Remember that only **Approved** formats will be available to be selected when a user creates a new document. Document formats will need to be approved according to your office policies.
10. Select the **Save and Close** action to close the record.

An existing IQ Document record can also be made into a format. Simply open the document and change the **Type** filed to **Document Format**.

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Notes

Creating a Form Letter Format

Letter formats control how your letters will look, both when they are used for printed mail and when they are used for e-mail correspondence. The can also include standard "boilerplate" text like a commonly used greeting or closing paragraph. The Print Format in your format may contain merge codes that pull information from People and Mail records to be used as part of the text of a letter. The E-mail Format will typically contain images and html. Formats are used as the basis for form letters and custom letters. Letter formats are created from other formats that exist in your system. The first format will be created when IQ is originally installed and configured.

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Notes

How to create a letter format:

1. Select the **Add Form Letter** action.
2. Type the name of the format in the **Name** field.
3. Select *Form Letter Format* in the **Type** field.
4. Click in the **Directory** field and select a folder to place the format in a folder. The folder that appears in this field is the one set as the default in your user **Preferences**.
5. Select an existing format to use as the starting point from the list of available formats displayed in the left side of the dialog. The selected format will be displayed on the right.
6. Click the **Add** button.
7. IQ displays the record page. Type body text content into the content iframe of the HTML editor on the **General** tab if desired.
8. Click the **Print Format** tab to view and make changes that will control the appearance of printed hard copies based on this format:
    a. Click **Check Out Print Format** to edit the Print format in Microsoft Word.
    b. Make the required changes.
    c. Save and close the Word file.
    d. Click the **Check In Print Format** action in the IQ record to save the modifications back to IQ.
9. Click the **E-Mail Format** tab to view and make changes that will control the appearance of e-mail correspondence for letters based on this format.
10. Use the *Printed View* and *E-mail View* radio buttons on the **General** tab to verify that the format is correct.
11. **Save and Close** the format record or route it for approval as you normally would.

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Notes

Note that formats can contain fill-ins, merge codes, and references. When you use a format with one or more of these types of merge codes to create a new form letter, you'll save yourself the time required to type them into your form letter. For example, you might have a standard reference format that you use when creating new referral letters. Or, you can add copy and enclosure fill-ins to a format so that all form letters you create with that format will automatically have those fill-in merge codes.

Because formats are the basis for letters used in your office, make sure the content and layout are reviewed carefully prior to approval.

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Notes

How to create an envelope format:

1. Select the **Add Form Letter** action.
2. Type the name of the envelope format in the **Name** field.
3. Select *Envelope* as the **Type**.
4. Click in the **Directory** field and select a folder to place the format in a folder.
5. Select an existing format to use as the starting point from the list of available formats displayed in the left side of the dialog. The selected format will be displayed on the right.
6. Click the **Add** button.
7. Click the **Print Format** tab to view and make changes that will control the appearance of printed hard copies based on this format:
    a. Click **Check Out Print Format** to edit the print format in Microsoft Word.
    b. Make any required changes.
    c. Save and close the Word file.
    d. Click the **Check In Print Format** action in the IQ record to save the modifications back to IQ.
8. Complete fields in the IQ record page.
9. Change the status to **Request Approval** and queue to the document to the appropriate approver or change the status to **Approved** if you are authorized to approve documents.
10. Select the **Save and Close** action to close the record.

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Notes

Draft Watermarks

IQ removes watermarks from all types of letter printing except for draft printing. This enables you to include a DRAFT watermark in your letters that will be removed from preview, copy, and final letters but printed on drafts. You can include DRAFT watermarks in new form letters when you create them, but if you include them in your formats, new form letters created with those formats will automatically have this feature.

How to set up a DRAFT watermark:

1. Add a new format or form letter or search for one that you've created previously.
2. Check out the format or letter to move it from IQ to your workstation and open it in Word.
3. In Word, go to **Format** > **Background** > **Printed Watermark**.
4. In the **Printed Watermark** window, select the **Text watermark** option.
5. Click in the **Text** field and select DRAFT.
6. Use the default settings unless there is something you want to modify.
7. Click OK to save the watermark.

Creating Auto Letters

When you send a form letter through Workflow, you can have Quorum automatically generate a second, or auto letter, to another recipient. The first letter must have at least one reference merge code in it and the auto letter must be linked to the first letter through the References panel of the Form Letter Record page. You can link one auto letter to each reference in the first letter.

How to create an auto letter:

1. Create the form letter using the **Add Form Letter** action.
2. Add at least one reference to the letter.
3. On the **References** panel, select the **Auto-Letter** for each reference by typing the letter name or clicking the lookup icon and selecting the letter from the list.
4. Click the **Save and Close** button.

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Notes

Viewing Pending Mail for a Form Letter record

The **Usage Statistics** section at the bottom of the **Form Letter** page shows the number of pending and completed mail records to which the letter as been assigned.

Usage Statistics
Pending mail using this letter: 9 Mail Records that are being sent to 25 People Records
Completed mail using this letter: 33 Mail Records that were sent to 27 People Records (Analyze E-Mail Recipients)
Document attachments for this letter: 0
File attachments for this letter: 0
Last Used: 12/2/2009 5:18:14 PM

You can view a listing of the pending mail records, and open or perform actions those records.

How to view and update pending Mail from a Form Letter record:

1. Search for the form letter.

2. On the Form Letter page, select the **Pending Mail Using this record** link in the *Usage Statistics* section of the *General* panel of the Form Letter record page. The **Mail Search Results** page appears with all pending mail records (those with a status code other than Completed) to which this letter has been assigned.
   To view a mail record, click the Mail ID link.

   To perform an action on multiple mail records (print, send e-mail, edit, etc.), select the check box next to each record or click the **Select All** link at the top of the page, and select the appropriate action.

To return to the Form letter page, click the **Library** link in the **Response** column.

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Notes

Document Approval

IQ uses the **Status** of documents and form letters to determine whether they are ready to be used. These statuses include:

- **Draft** – A status of *Draft* is automatically assigned to newly created form letters as well as to documents that are uploaded to IQ. A form letter should retain this status until it is ready for review. Likewise, when an *Approved* Form Letter is edited using the Edit Content view, the status of the letter is changed to *Draft*. As explained above, *Draft* letters can be made available for assignment in Mail records be marking them *Assignable*.

- **Approved** – A form letter that has been approved is always available to be used in all types of Mail records and to be printed and/or e-mailed. You cannot make an approved form letter un-assignable. An approved Document can be used and sent as a Document attachment to Mail and Workflow records. A document with an approved status generally means:

  - ✓ The content is complete and correct,
  - ✓ The format is correct for both printing and e-mail,
  - ✓ The content and attachments have been reviewed according to the procedures currently in place for your office, and
  - ✓ The letter is ready to be sent to constituents, agency contacts or other recipients. Or, for Documents, that it is ready for its intended internal or external audience.

  Only one version of any document can be *Approved* at a time. Marking a document or form letter *Approved* indicates to other IQ users in your environment that this is the current, accepted version of the document. Marking one version *Approved* will automatically move another version from *Approved* to *Inactive* status. Documents with *Draft*, *Request* Approval or *Denied Approval* are considered to be in the process of being approved and are unaffected.

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- **Inactive** – An inactive document is one that should no longer be used. A letter may be *Inactive* because the content is out of date or has been superseded, because the issue discussed in the letter is no longer an active concern, or for any other reason. Marking the form letter *Inactive* allows you to retain a record of its contents intact and linked to the Mail records in which it was used. Inactive letters are un-assignable and do not appear in the **Select Letter** dialog box when you're searching for letters to assign to a mail record. A link to an inactive letter is maintained in mail history, and you can search for and access inactive letters using Document Searches and the Document Directory. You can manually assign a status of *Inactive* to documents as necessary.

- **Request Approval** – This status is available if your office uses the document approval process. When you select this status, a field appears with one of two entries, *Any Form Letter Approver* or the name or your default form letter approver selected in your user **Preferences**. Click in this field for a listing of all valid approvers. Form letters with a status of *Request Approval* can be assigned to mail if the **Assignable** check box is selected, but the mail cannot be printed in final or sent via e-mail until the form letter status is changed to *Approved*. This status is only available for Form Letters, Formats and Envelopes.

  Setting the status of a document to *Request Approval* will cause the document to show in the **Approval Requests for Documents** count on the **My IQ** page for all users who are document approvers. This allows approvers to easily find and approve documents.

- **Denied Approval** – This status is available to users who have been granted approver security for form letters. When you select this status to deny approval of a form letter, you can use the **Description** field to tell the author why the letter was not approved. Form letters with a status of *Denied Approval* can be assigned to mail if the **Assignable** check box is selected, but the mail cannot be printed in final or sent via e-mail until the form letter status is changed to *Approved*. This status is only available for Form Letters, Formats and Envelopes.

  Setting the status of a document to *Denied Approval* will cause the document to show in the **Approvals Denied for Documents** count on the **My IQ** page for the users to whom the document is assigned. This allows users to easily find and update documents in need of further editing before they can be approved.

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Notes

Approving Form Letters

The IQ document approval process lets you define different users or groups of users who can approve a form letter before it can be used in any type of Mail. There are three Status codes that are used for the document approval process: *Request Approval*, *Approved*, and *Denied Approval*. The ability to select these codes in the **Status** drop-down is determined by user security. A user who must go through the approval process will see and can select the *Request Approval* status but not the *Approved* status. A user with security to approve mail will see all Status codes.

When a user changes the status of a Form Letter to *Request Approval*, an additional field is displayed to the right of the status. From this list, the user can select from a list of approvers. The list of available approvers is determined by the approval group specified in the User record.

When an approver changes the status of a Form Letter the user who requested approval is notified with an alert.

Your ITC can assist you with setting up document security for individual users to require them to receive approval of form letters, or to give them authority to review and approve a form letter prior to its being used.

How to route a form letter for approval:

1. Add a new form letter, completing fields on the Draft Form Letter page.
2. Make all necessary edits to the content, Print Format and E-mail Format for the letter.
3. Click in the **Status** field and select *Request Approval*. A field will appear next to the **Status** field for selection of an approver. Click in the field and select a name to route the letter to that person, or select *Any Form Letter Approver* to route the letter to anyone authorized to approve form letters.
4. Select the **Assignable** check box if you want this letter to be available for assignment to mail records. Assignable form letters can be entered in the **Letter Name** field of the mail record regardless of their status. However, they cannot be printed in final or sent via e-mail until their status is changed to *Approved*.
5. Select the **Close** action to close the Form Letter record.
6. Your form letter is routed to the person or persons with review and approval authority. The approval can approve the letter (change the status to *Approved*) or deny approval and request changes.

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How to locate your approved or denied form letters:

1. Click the **Approvals Granted for Documents** or **Approvals Denied for Documents** link under **My Work** in My IQ.

   OR

   Use the Status field in Document searches to specify *Request Approval* or *Denied Approval* form letters for yourself or other users.

Given the necessary rights in user security, you can review, and then approve or deny approval of form letters created by other users.

How to locate and approve or deny form letters:

2. Click the **Approval Requests for Documents** link under **My Work** in My IQ. This link does not appear if you are not set up as an approver.
3. On the **My Approval Requests** page, click the letter name link of the letter you want to review. Or, to review all letters awaiting your approval, click the **Select All** link at the top of the page and then select the **Edit** action. Use the **Next** action on the **Form Letter** record page to move from one record to the next.
4. Review the content of the letter and its appearance in all formats using the *Content View*, *E-Mail View* and *Printed View* radio buttons on the General tab of the record. Alternately, use the **Preview Letter** and **Preview E-mail** actions to generate merged samples of the letter.
5. Click in the **Status** field and select one of the following status codes:
6. *Approved* - to approve the letter and make it available to printing and sending via e-mail.
7. *Denied Approval* - to deny approval and return the letter to the author. You can use the **Description** field to tell the author why the letter was not approved.
8. Select the **Close** or **Next** action to close the Form Letter record.

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Notes

Changing the Status of a Document

Every document and form letter stored in IQ will have a status of *Draft*, *Approved*, or *Inactive*. In addition, if you use the form letter approval process, you'll have two additional statuses: *Request Approval* and *Denied Approval*. With an appropriate level of security, you can change the status of a document.

How to change the status of a document or form letter:

1. Create or search for the document. You can search for form letters that you've routed for approval or letters that have been routed to you for approval by clicking the appropriate link in the **My Work** area on the **My IQ** page.
2. On the **Document Record** or Form Letter page, click in the **Status** field and select a status.
3. Select the **Assignable** check box if you want to make a form letter available for assignment in a mail record. The **Assignable** check box is unavailable and selected for *Approved* letters and unavailable and cleared for Inactive letters.
4. Select the **Save and Close** action to save the new status and close the page.

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Notes

Editing Documents

Checking Documents and Print Formats In and Out

The components that make up Form Letters, Formats, and Envelopes – their content, Print Formats and E-mail Formats – are stored in the Oracle database. The Print Format is stored as a Word file, and can only be edited once it has been checked out. Similarly, Documents that are not Mail-related (where the **Type** is *Document* or *Document Format*) must be checked out in order to be edited. The application used for editing a Document is determined by the file extension of the stored document.

While a document or a Print Format is checked out, it is stored in the c:\iq folder. The file name is an assigned, sequential number plus the file extension (for example 110343.doc), and it appears in the Word title bar. Use the **Check Out** action to check out a document or a Print Format for editing on your workstation.

As long as a document or Print Format remains checked out by one user, other users cannot check it out for editing. While the Print Format is checked out, the letter cannot be printed in final, nor can e-mail using the letter be sent. When a document is checked out to a user's workstation, it can only be checked in from that same workstation.

Once you've finished working on and saved a checked-out document or Print Format, you must load it back into the IQ database. This is the check-in procedure, which can be done by selecting the **Check In** action. Once you check in a document, the file is removed from the c:\iq folder.

Uploading Changes

You can use the **Upload Document Changes** and **Upload Print Format Changes** actions to save changes you have made to a document or Print Format without checking it back into IQ. Changes are saved to IQ as a new revision. The document remains checked out on your workstation, thus allowing you to continue editing.

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How to upload changes:

1. Click the **Documents** tab.
2. Search for the document that you want to check out.
3. Click the document name link on the search results page.
4. Select the *Check Out Document* or *Check Out Print Format* action on the **General** panel of the record page.
5. Make changes to the document or letter and save them. Leave the document open if you plan to make additional changes to it.
6. Select the *Upload Document Changes* or *Upload Print Format Changes* action on the **General** panel of the record page.
7. IQ updates the **Status Log** with a link to the version of the document as it existed prior to selecting the *Upload Document Changes* or *Upload Print Format Changes* action.
8. Click the **Text** tab to view the changes that were saved by the *Upload Document Changes* or *Upload Print Format Changes* action. Note that you must use the *Check In Document* or *Check In Print Format* action to transfer the "final" document from your workstation to the IQ database.

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Notes

Versioning

Creating a New Version of a Form Letter or Document

When a format or letter must be updated or changed, you can make a new version of that letter while still retaining the original letter and references to it in Mail records using the *Make New Version* action. Often you'll want to continue using the same form letter name in response to a specific issue even though details in the content of the letter may change.

> When a new version of a format is marked *Approved*, user preferences that point to a prior version are automatically updated to ensure the proper version is used.
>
> Only one version of any document can be marked *Approved* at a time. When a new version is *Approved*, the earlier approved version is automatically changed to *Inactive*.
>
> Versions of a document are linked by a common **Parent ID**. **Parent ID** is displayed in the document record and is available for display in the Documents grid.

The following information is carried forward when you make a new version: *Letter Name*; *Type*; *Description*; *Directory*; *Envelope*, *E-mail Subject*; *Document*, *Issue* and *Workflow Codes*; *Workflow Categories*; *Fill-ins*; *References*, the content of the form letter or document, and Print and E-Mail Formats for form letters. Attachments are also carried forward and should be reviewed and manually updated as appropriate for each version of a letter. A warning will be given when the document moves to *Approved* status to remind the approver to also review attachments.

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How to make a new version of a form letter:

1. Search for the existing form letter.
2. Click the letter name link to go to the **Form Letter** record page..
3. Click the *Make New Version* action. A new **Form Letter** record page appears with the new version number in the **Version #** field at the top of the page. The *Edit Content* view is automatically selected.
4. Make changes to the content as necessary.
5. Complete or update other fields on the **Form Letter** record page as necessary.
6. Switch to *E-mail View* to verify that the letter is properly formatted for use with e-mail.
7. Switch to the *Print View* to verify that the letter is properly formatted for printed mail.
8. Update the **Status** of the letter and, if necessary, select an Approver.
9. **Save and Close** the new version of the letter.

Automatic Versioning

After a form letter has been used in completed Mail records, IQ will automatically generate a new version of the form letter when it is edited. This allows earlier records to accurately reflect what the recipient received, even as the content of the letter may continue to be updated with newer information on an issue. If the prior earlier version is also used in pending Mail records, the user will be prompted to update these records with the newer version.

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Notes

Uploading a New Version

There are times when the checked out version of a document may get out of sync with information in the IQ database. For example, you have the document checked out and another user clicks the **Undo Check Out** action; a document requires input from someone who is not an IQ user; or when the final version of a document needs to be in a different format than the prior versions (the document is created and edited in Word but the final version is saved as a PDF).

For these circumstances, IQ allows users who have explicitly been granted access to fix this the ability to upload a loose file as a new version of an IQ document. Users grant *Lock 231 – Upload New Document Version* will have an **Upload New Version** action in the Document record. This process allows the user to browse and select the desired file and uses that file for the content of the document in the newly created version. Metadata in the document record (Name, Parent ID, assignment and code information) are all carried forward from the currently selected version.

> *Upload New Version* is available to correct those rare circumstances when document content has been edited outside of IQ, and is not available for Form Letters or other Mail-related documents. Access to this feature should be limited to document managers.

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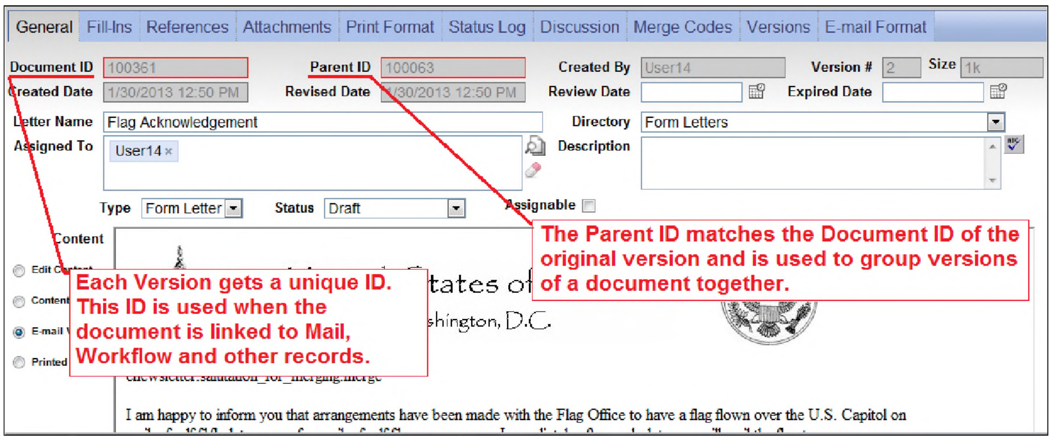
Notes

Understanding Document Revisions and Versions

Every document record created in IQ – Form Letter, Format, Document or Envelope – is assigned a unique ID number, the *Document ID*. New versions of a document are linked by the *Parent ID* which is the same as the Document ID of the original version of that series of documents. Each version has its own *Document ID* and is a unique record in IQ.

Every new document record gets a unique *Document ID*, whether it is created using *Add Document*, *Copy Document* or *Make New Version*.



A **Version** of a Document is one instance (record) of that document. If there is more than one version, those versions are grouped and linked by the *Parent ID*. New versions are created using the **Make New Version** action. A new document record is created based on the information in the record you start with. Codes, document content, envelope, formatting, fill-ins and merge codes are all carried forward with each version.

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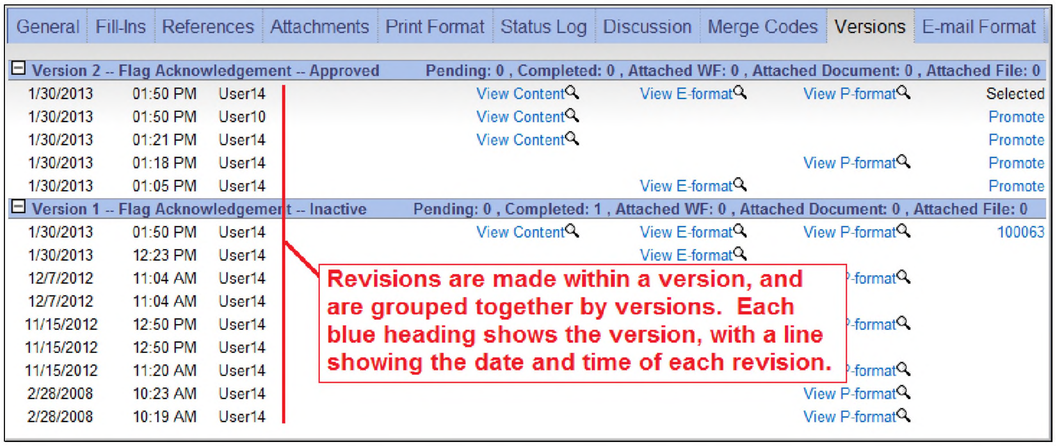
Revisions of a document are created automatically each time the the document is changed. For Form Letters and formats, this includes changes to the content, the Print Format and the E-mail Format.



For Documents, Document Formats and Envelopes, revisions are created when the document is checked out, edited in Word and checked back in. When the document is checked in, IQ automatically evaluates the content of the document for changes. If the document has changed in any way, a revision will be created.

Revisions are saved in the IQ database, but they are not assigned a new *Document ID*. They are stored as part of the current record. Revisions are shown by date on the Versions tab within the document record.

Linking Documents to other IQ records

When a Document is linked to another record or when a Form Letter is used in Mail, the **Document ID** of the selected version (record) is used to establish the link. This allows IQ to correctly identify which version was used. The link captures the version used, so that the history stays accurate as newer versions of the document are created.

For example, a piece of legislation is up for consideration. A constituent writes and asks for information on the legislation. A month later when there is new activity, a new version of the Form Letter is created. The Mail record with the original response now points to the version *that was accurate at the time of the response*, and any mail created with the new version will contain the updated information (accurate now). As the information changes over time, versions allow the history of what information was current when to remain accurate.

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Notes

When and how do new Versions get created?

When a document is initially created and is in the process of being edited IQ will save changes as revisions. Once the document is approved and put into use, the process varies slightly for Form Letter and non-Form Letter documents.

For Form Letters, IQ will check to see whether a Form Letter is used in Mail before it is checked out. IQ automatically enforces versioning if the letter has been used in completed mail. The *Edit View* and *Check Out Print Format* action will not appear. Instead users will only have the option to *Make New Version*. Users who have explicitly been granted the ability to override the automatic enforcement of versioning (*lock 226 – Override Checkout*) will see the *Edit View* radio button, but will receive a warning before the content is available for editing. These users will also see *Check Out (Override)* to enable editing the Print Format.

> Overriding edit prohibitions should only be used for making minor, non-material changes to the Form Letter content or Print Format (correcting typographical errors, for example). If someone contacted your office and received a response, you want to make sure that the response information in IQ accurately reflects what they received. Changes to the document after mail is completed and sent will carry over to those records – they will show the updated information rather than the information in the actual response. For this reason, the ability to edit versions with completed mail should be used sparingly and with extreme caution.

A new version of a Form Letter or a non-Form Letter document can also be created at any time using *Make New Version*. *Make New Version* is used whenever there are material changes to the content of an approved document. If a document has already been approved and used for any purpose, it is helpful to distinguish between the version that *was in use* and the version that *will be used* moving forward. The person who edits the document has an intuitive understanding of when the nature of the change makes this distinction necessary. As such, the ability to force a new version is always available for use. Material changes of this sort differ from one document to the next. Returning to the form Letter example given above, the user may simply be adding information; or there may be cases where the entire content of the document changes – July's version of a newsletter versus the version that was sent out in June.

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When not to create a new version

There are times when changes to a document happen within a version. For example, if a form letter or other document is being developed, is in draft status or is being edited as part of its approval process, changes really are changes *within* the version – there will be no distinction until the document has been approved and cleared for use. Likewise, if a form letter has never been sent, changes can be made without concern how they impact Mail records – there can be no discrepancy between the current version and what a constituent received if it's never been sent!

Remember, IQ automatically keeps a record of every incremental – there is no need to create a version for every edit.

A Special Note on Document Approval Workflows

Because the Document ID is the identifier that links a document to a workflow record, editing a document as part of an approval Workflow should always be completed within the version. All revisions are saved within the document record and are just a few clicks away from the main Workflow record. However, if multiple versions are created, each will need to be manually linked back to the Workflow record.

What's the difference between Copying a Document and Make New Version?

Copy Document makes a copy of the selected document that is independent of the source document. *Make New Version* allows the records to remain linked because they share a *Parent ID*. *Copy Document* is appropriate when you are creating a new document that borrows content from an existing document, but is otherwise distinct. The new document will have a unique Document ID and a unique Parent ID to enable versions of it to be tracked separately from the source document. A record of the copy with the name of the source document is maintained in the Status Log.

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How do I know which version is the right one to use?

IQ allows only one version of any document to be marked as *Approved* at a time. For Form Letters, only *Approved* documents and documents marked as *Assignable* appear for selection. Version information and status information (other than approved) are shown beside the Form Letter Name (*d* for *Draft* status, *ra* for *Request Approval* status, etc.).

For other types of documents, the search criteria entered when searching for documents will allow you to filter to only approved documents.

In all cases, IQ documents must be approved before they can be mailed, used as mail or Workflow attachments, or otherwise delivered to recipients outside of IQ.

How can I find all versions of a particular document?

By default, IQ populates the name of a new version with the same name used in the version used to create it. So, typically all versions of the document will have the same name. However, Document Name is editable and can be changed when necessary. For this reason, *Parent ID* is an available column in the Documents grid. All versions of a Document will have the same Parent ID, so enter search criteria that includes unique information about the documents you're looking for and set *Status* to *All Statuses*. Then sort by *Parent ID*.

Returning to a previous example, if you have a newsletter for all grant recipients, the Document names may change for each version to make it clear which is for which month: *Grants - July 2010*, *Grants – Aug 2010*, etc. Sorting by Parent Id would force these versions to appear together.

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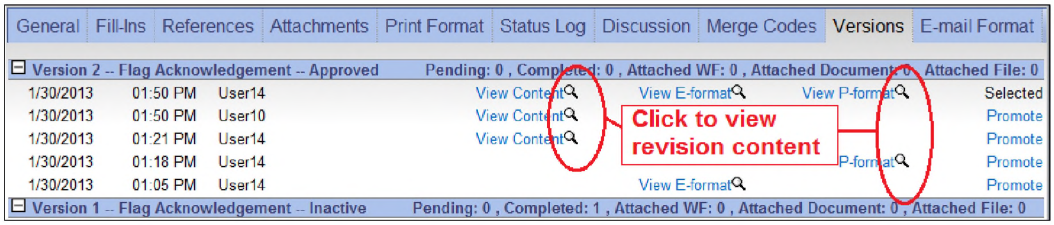
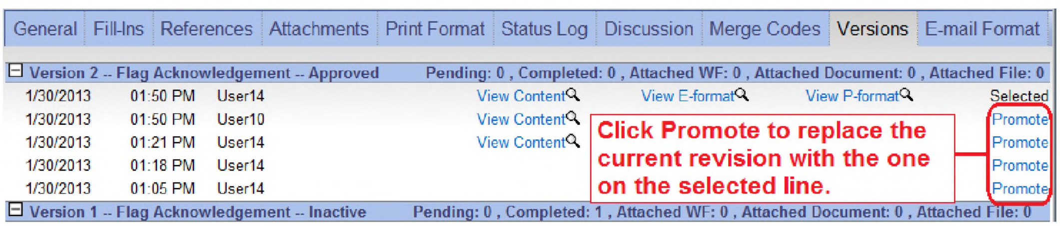
How can I retrieve a revision to see what it contained?

Versions of a document get their own record and ID, and can be accessed from the grid. Revisions of a document can only be accessed from within the record window. To view the content of a revision, click the magnifying glass next to the date and user information for that revision.



If you find that a revision should be used in place of the current content, click the *Promote* link for the desired revision. Only revisions of the selected record (the record you're in) can be promoted.



For Form Letters, where changes to the content, the Print Format and the E-Mail format are stored separately, each revision appears on its own line with a *Promote* option to the right. This means, for example, that a revision of the Print Format can be promoted without changing the current content or E-mail Format.

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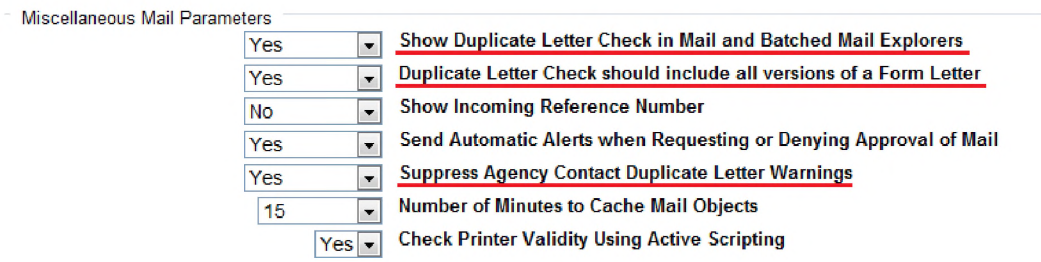
Mail Duplicate Warnings and Version

IQ can be set to warn a user when a letter used in Mail has already been sent to the person (another Mail record for the same person exists and uses the letter). The system administrator has control over whether this check is turned on, whether it evaluates only against the selected version of the letter (using the Document ID) or all versions of the letter (using the Parent ID), and whether it is omitted for Agency Contacts used with Workflow (who may rightly receive the same letter in reference to a variety of separate workflows).



Show Duplicate Letter Check in Mail and Batched Mail Explorers -- By default this is set to *Yes*. This enables Duplicate Mail Check.

Duplicate Letter Check should include all versions of a Form Letter – By default, this is set to *No*. When this is set to *No*, IQ will evaluate matches only for the current Version (pointing to the same *Document ID*). When this is set to *Yes*, IQ will warn if any mail record for this person uses any version of this document (if any mail record points to a form letter with the same *Parent ID*).

Returning to the Form Letter example above: A constituent requests information on a piece of legislation and receives Version 1 of a letter in response. A month later, a new version of the letter is created with additional information reflecting the current status of the legislation. If this setting is set to *No*, a warning will not be given if Version 2 is assigned in mail for this person. If this setting is set to *Yes*, a warning will be returned. In either case, the new version can be sent to this person for follow up contact. This setting simply determines under what circumstances the IQ user is notified.

Suppress Agency Contact Duplicate Letter Warnings – By default this is set to Yes. This determines whether the warning message for duplicates is returned when the recipient is identified as an Agency Contact in your IQ database.

Formats, User Preferences and Version

For releases prior to June 2008, IQ user preferences were linked to a specific version of a document (linked by Document ID). For this reason, when that

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version changed status (from Approved to Inactive, typically) the user preference would be cleared. The user then needs to manually reset their Mail and Documents format preferences.

For releases after this date, user preferences are automatically updated to the latest approved version of the selected format when any version is marked approved—if a new version or a prior version's status changes to *Approved*, it is automatically updated for users with any other version selected in their preferences. Formats with the same *Parent ID* are evaluated to see which is *Approved*, and that is the version used.

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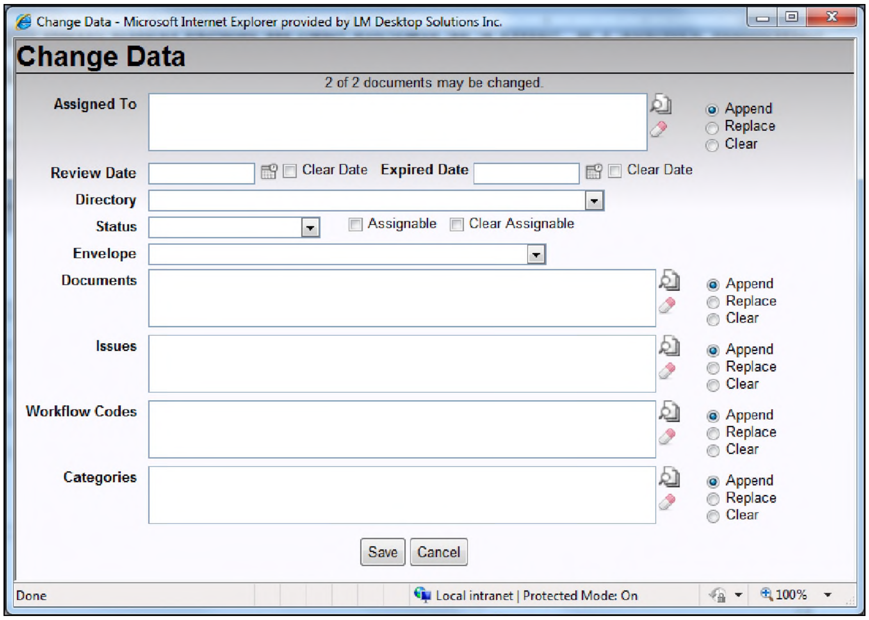
Updating Document Information Using Change Data

In addition to editing individual fields in one record at a time, IQ allows multiple records to be updated from the grid using the *Change Data* action.



Information can be added or updated for each of the fields shown in the Change Data dialog. Information entered in *Assigned to* and in the *Documents*, *Issues*, *Workflows* and *Categories* code fields can be used either in addition to or as replacement for the information already in the record(s). To replace information in the records with information entered in the Change Data dialog, select the *Remove Existing* checkbox adjacent to the desired field. If not new values are entered, existing data will be cleared without the addition of new data. To add codes or assignments, click the *Append to existing* checkbox.

Similarly, a *Review Date* or *Expire Date* can be added to records, updated or cleared. To add or update *Review* or *Expire Dates*, enter the date in the field and click *Save*. Use the *Clear Data* checkbox next to the desired date to clear existing *Review* or *Expire Dates* without specifying a replacement date.

Documents can be moved from their current location to a new Directory using the *Directory* drop-down. Select the target directory and click *Save*.

The *Status* of documents can be updated by selecting the desired Status from the *Status drop-down*. When the *Request* Approval status is selected and additional field will be displayed below to allow selecting an approver to whom the request should be sent. Additionally, the *Assignable* property of Form Letter records can be checked or cleared using the *Assignable* or *Clear Assignable* checkboxes next to the Status drop-down.

Notes

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Notes

> Only Form Letters use the *Assignable* property and Envelope fields. These will be ignored for non-Form Letter documents that have been selected for update.
>
> Form Letters assigned a status of *Approved* are automatically marked *Assignable*. Likewise, *Inactive* Form Letters automatically have the *Assignable* checkbox cleared so that they can no longer be selected for use in Mail records.

Updating Email and Print Formats

IQ users who have been granted access to Security Lock #214 can use the Change Print and Email Formats action to mass update the contents of the email and/or print formats for selected form letters. This action automatically excludes old style form letters (i.e. those without any content) and eNewsletters as well as those form letters which cannot be changed based on record security.

The Change Print and Email Formats action allows users with the appropriate security to:

- Select what to change (print format, e-mail format, or both)
- Exclude records based on their current e-mail and/or print format
- Select the format to use for the mass updating
- Preview both the e-mail and print view of the form letter

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How to update email and/or print formats for one or more form letters:

1. Search for the form letters you want to update using a Quick or Advanced search.

2. When the form letters appear on the **Search Results** page, select the check box next to each form letter you want to update.

3. Select the *Change Print and Email Formats* action. IQ displays the **Mass Change Print and E-mail Formats of Form Letters** dialog with a count of the number of letters which can be updated.

4. The Change field defaults to *Both E-mail Format and Print Format*. Click in this field and select *E-mail Format Only* or *Print Format Only* if you only want to update the email or print format.

5. Select the checkboxes in the **Exclusions** list for any formats, such as custom formats, you want to exclude from the mass update. Custom formats are displayed in red text.

6. A list of available formats appears in the **Select Format** pane on the left. Click the format name to view it on the right. Click the *E-mail view* or *Printed view* radio button to display the contents of the email format or print format for the selected format.

7. Click the *Submit* button to update the format. When completed, IQ displays a message dialog with the number of form letters that were updated.

8. Click *OK* to close the message dialog and clear the selected form letters.

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Notes

Adding Workflow to a Document

You can create and attach new workflow records to document records using the *Add Workflow* or *Add Document WF* actions on the **General** panel of the Document record. You can attach an existing workflow using the *Attach Workflow* action.

Documents may be linked to Workflow records when they are used as part of the process that a Workflow tracks. For example, a consent form may need to be completed by the primary person on a Workflow record before their information can be shared with Agency Contacts. Document Workflow records can be used as a means of routing documents for comment, consent or approval.

The *Add Workflow* action lets you select a template from a list of active workflow templates. The Add Default WF action uses the default template that's set in your user **Preferences** and only appears if you've set a default. Attached workflows are displayed at the bottom of the **General** panel of the Document record.

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Notes

How to create and attach a new workflow to a document record:

1. Add a new document or access an existing document.

2. On the **Document Record** page select the **Add Workflow** or **Add Document WF** action.

   *If you selected the **Add Workflow** action*, select a template from the list of available templates. Complete the appropriate fields on the **General** panel of the workflow record. Select the **Save and Close** action to save the new workflow and return to the Document Search Results page.

   *If you selected the **Add Default WF** action*, complete fields on the **General panel** of the workflow record. Select the **Save and Close** action to save the new workflow and return to the Document Search Results page.

To view the attached workflow, click the workflow ID link in the Attached Workflows section located at the bottom of the **General** panel of the document record. Select the **Return to Document** action in the Workflow record to return back to the Document record.

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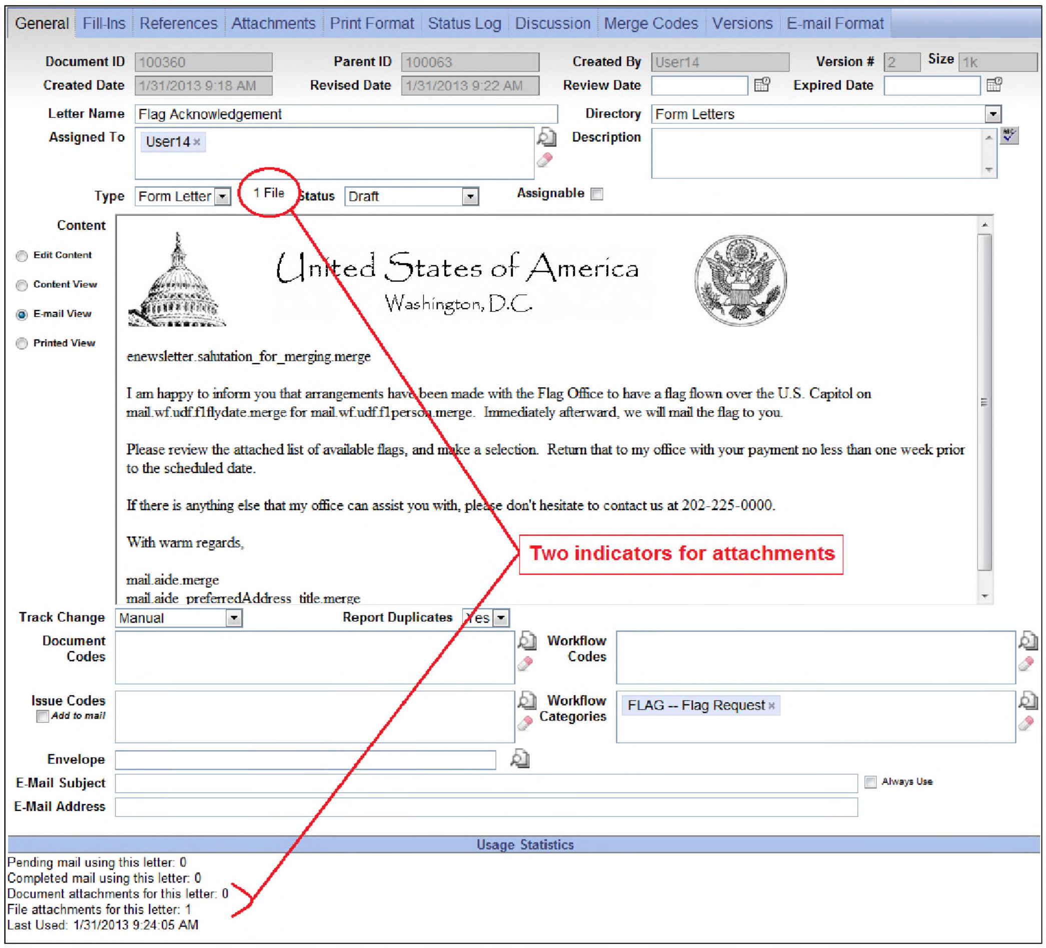
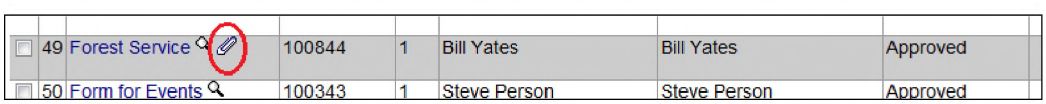
Notes

Attaching Documents and Files to Form Letters

When you attach a document or file to a form letter, it is automatically sent as an attachment when you use the form letter for e-mail correspondence. Attachment information is displayed in the General tab of the form letter record, and on the Attachments panel.



Attachments are indicated in the Documents grid by a paperclip icon.



Document attachments are links to other IQ Document records. It is important to know that when you link a document to a form letter you are linking to a specific version of the document. If a new version is created, the form letter record is not automatically updated. As with the form letter itself, only Approved documents can actually be sent. The status of both the form letter and the document record used as an attachment must be *Approved*.

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Notes

File attachments allow you to upload individual files as you would when sending an e-mail attachment outside of IQ. File attachments are stored only as part of the form letter record and are not tracked separately in IQ.

Attachments carry forward when a new version of a form letter is created or when a letter is copied to create a new record.

IQ gives a warning when the status of a form letter with attachments is changed to Approved. This reminds the approver that attachments should be reviewed to ensure that they are current and appropriate as part of the normal letter approval process.

How to attach a Document record for use with e-mail correspondence:

1. Create a form letter or find an existing letter.
2. On the **Form Letter** page, click the **Attachment** tab.
3. On the **Attachments** panel, select the *Attach Document* action.
4. Complete the fields to search for the desired document and click *Go*.
5. Select the Document record(s) to be used as attachments and click *Attach*.

How to attach a file for use with e-mail correspondence:

6. Create a form letter or find an existing letter.
7. On the **Form Letter** page, click the **Attachment** tab.
8. On the **Attachments** panel, select the *Attach File* action.
9. Click the ***Browse*** button to search for the file you want to attach, and then click the ***Save*** button to attach it to the form letter. The attached file name, along with the date and time it was attached and the user who attached it, appears on the **Attachments** panel.

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Notes

To view the file, click the file name link. To detach the file, select the check box next to the file name and select the *Detach File* action.

Note that you can also attach files to e-mail messages from the **Mail Record** page.

Copying a Document

You may want to copy a document and then modify it to create a similar document or form letter response.

How to copy a document:

1. Search for the document you want to copy.
2. On the **Document** or Form Letter page for the document you want to copy, select the *Copy* action.
3. Type the name of your new document in the **Document Name** or **Form Letter Name** field.
4. Click in the **Directory** field and select the folder into which you want to place the copied document.
5. Click the *Copy* button.

The document and any attachments are copied and given a status of *Draft*. Description information, directory, fill-ins, references as well as the Envelope, Print Format, E-Mail Format and subject, issue, document and workflow codes assigned to the original form letter are also copied.

A user with the ability to create a document will also have the ability to create a document. Approval security already in place will also apply to these documents.

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Notes

Creating a Discussion Topic

You can create a discussion topic about a document and send optional alerts to users and/or groups. A user can subscribe to a topic, meaning they will be alerted when a response is added. The subscription default is controlled by a user preference.

How to create a new Discussion Topic:

1. Search for the document you want to add the discussion topic to.
2. On the **Document Record** page click the **Discussion** tab and select the *New Topic* action to go to the **Discussion Topic** dialog box.
3. Click in the **Subject** field and enter the subject of the Discussion Topic. Note this will not appear in the subject of the e-mail. The subject of the e-mail will be "Discussion Alert from <User Name>" in which <User Name> is the IQ user that sent the alert.
4. Enter the text of the discussion alert in the text box located below the **Subject** field.
5. Check the **Subscribe to this topic** check box if you would like to receive an e-mail, with a link to the **Discussion** panel of the associated document, each time a reply is posted. Note you can set your user preference to automatically subscribe to documents in which you are a participant.
6. Click in the **Alert User** or **Alert Group** and enter or select a user and/or group that you would like to send a discussion alert e-mail to.
7. Click the **Save** button to save the new discussion topic.

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Notes

Searching for Documents

Document Links from My IQ

The Document links in the My Work section of the My IQ page allows users to access their documents quickly and simply.

My Work

Pending Mail (120)	Today's Incoming Mail (0)	**Checked Out Custom Letters (2)**
Approvals Granted (0)	**Approvals Denied (23)**	**Approval Requests (124286)**
Active Batches (1)	Today's New Batches (0)	Active Sets (0)
Open Workflow (777)	**Step Past Due Workflow (6)**	Today's New Workflow (0)
Queued Workflow (114)	**Active Workflow (663)**	Monitored Workflow (0)
Draft Documents (130)	Today's New Documents (0)	**Checked Out Documents (18)**
Approvals Granted for Documents (0)	Approvals Denied for Documents (0)	**Approval Requests for Documents (2358)**
My Active Documents (155)	**My Review Alert Documents (11)**	My Expire Alert Documents (0)

Draft Documents

The Draft Documents link shows a count of all document records of any type that are assigned to the user and have a status of Draft.

Today's New Documents

The Today's New Documents link shows a count of all document records of any type that belong to the user and were created today, regardless of their status. This includes documents created by the user today and documents that were created by another user and are assigned to the currently logged in user.

Checked Out Documents

The Checked Out Documents link shows a count of all document records that are currently checked out by the user, including Form Letters and Formats where the Print Format is checked out. It's a good idea to have users check this link periodically to ensure they have not forgotten to check documents back in after editing.

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Approvals Granted for Documents

The Approvals Granted for Documents link shows a count of all document records for which the user has requested and been granted approval. Approved documents appear in this list from the time they are initially approved until they are associated with at least one completed Mail record.

Approvals Denied for Documents

The Approvals Denied for Documents link shows a count of all document records for which the user has requested and been denied approval. These documents require revision and approval before they can be used.

Approval Requests for Documents

The Approval Requests for Documents link shows a count of all document records belonging to the user that have a status of Request Approval.

My Active Documents

The My Active Documents link shows a count of all document records of any type that are currently assigned to the user and have a status of Active. This is considered to be the users working set of documents.

My Review Alert Documents

The My Review Alert Documents link shows documents with a review date that has passed. Review documents can be set to send an alert and to change status when the *Review Date* passes. These settings are controlled by your IQ system administrator.

My Expire Alert Documents

The My Expire Alert Documents link shows documents with an *Expire Date* that is approaching. Alerts are sent ahead of the expiration date. Your IQ system administrator determines the number of days in advance users will be alerted about expiring documents. Expired documents can be set to send an alert and to change status when the *Expire Date* passes.

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Notes

Advanced Search

An advanced search lets you search for documents based on any field information available. You can search for documents that contain specific information in a single field, or you can base your search on information contained in multiple fields. When you enter criteria in more than one field, the search will result in documents that meet *all of* the criteria (an AND search). If you select multiple items within a field, for example, more than one issue code, the search will result in documents that meet *any of* the criteria (an OR search).

How to perform an advanced search for a document:

1. Click the **Documents** tab to go to the **Quick Search** page for documents.

2. Click the **Advanced** link next to the **GO** button or select the **Advanced Search** action to display the **Advanced Search** page.

3. Type your search criteria into one or more fields on this page. Make a selection in the **Type** field to limit your search to form letters or other documents. When you enter criteria in more than one field, the search will result in documents that meet all the criteria (an AND search).

4. Click the **GO** button to begin the search and display the results.

   If you're not satisfied with the results of your search, click the **Modify Search** link to modify your search with additional criteria or select the **Advanced Search** action to start over. You can also use the **Modify Search** option to add records to those already selected. If you selected records found with the first search, that selection is retained as you modify your search criteria and find and select additional records.

5. Click the document name link on the Search Results page to display the document information.

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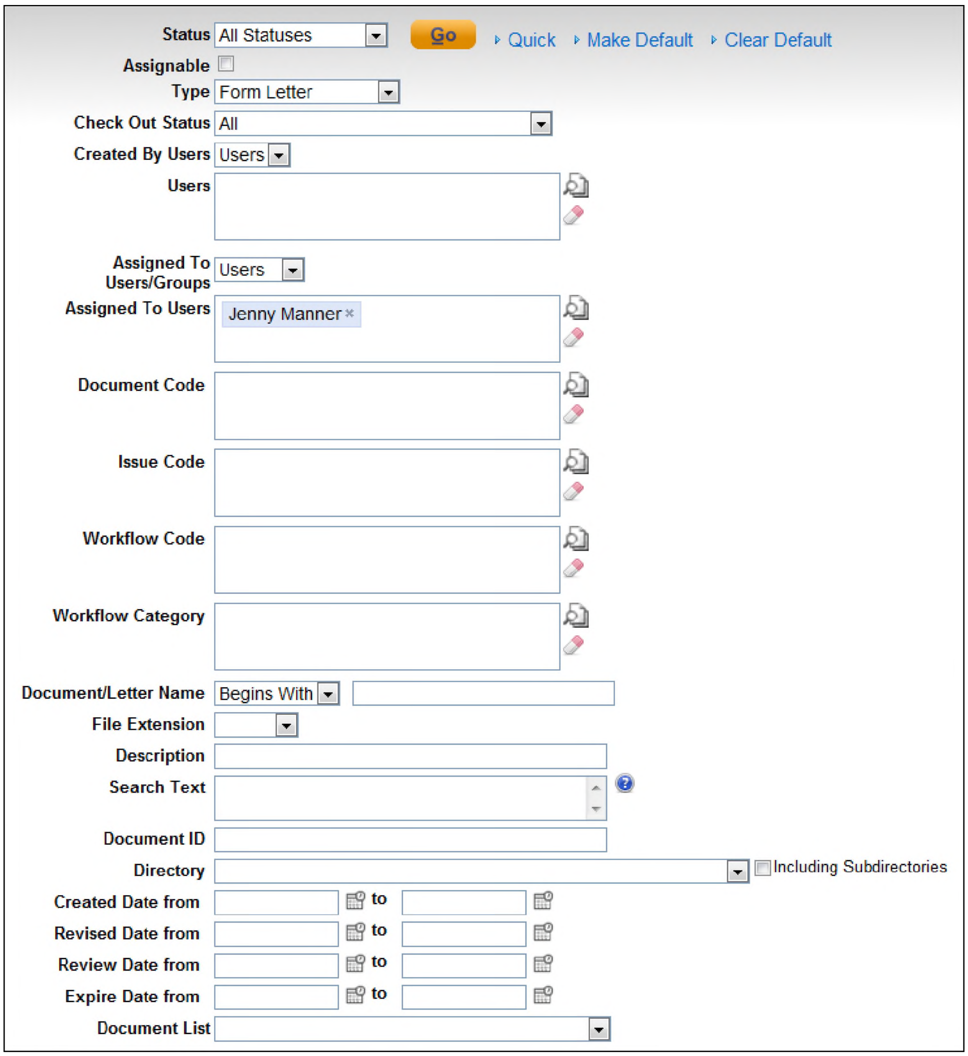
Notes

Advanced Search Criteria

Fields on the **Advanced Search** page let you enter as much criteria as necessary to find the document or documents you're searching for. Remember that when you enter criteria in more than one field, the advanced search finds documents that meet all the criteria (an AND rather than an OR search). For example, if you enter criteria in the **Status**, **Type**, and **Created by** fields, the search will return only those documents that meet all these criteria. Documents with matching criteria in only one or two of the fields would not be returned.



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Notes

The following fields are available for an advanced search: **Status**, **Assignable**, **Type**, **Check Out Status**, **Assigned To**, **Codes**, **Name**, **Description**, **Text**, **Directory**, and **Dates**.

Status

You can limit your search to those documents with a status of Draft, Approved, Inactive, Request Approval, Denied Approval, or Draft & Approved. Click in the **Status** field to select a status from the drop-down list. If you want to find documents with any status, or if you're not sure of the status, select *All Statuses* in the **Status** field.

Assignable

Select this check box to limit your search to form letters that can be assigned to mail records. This option is most useful when you're looking for draft form letters or those in the approval process that have been designated as assignable to mail.

Type

Documents can be one of four types: documents, form letters, formats, or envelopes. If you want to search for a specific type of document, click in the **Type** field and select a type from the drop-down list. Your search results will be limited to documents of that type. To search for documents of any type, click in the **Type** field and select *All Types*.

Check Out Status

You can limit your search to *Only Checked Out Documents* or *Only Checked In Documents* that are assigned to a specific user or group. Select *Only Checked Out Documents By User* if you want to find documents and/or Form Letters with Print Formats that are checked out by a specific user. When you select this option, a **Checked Out By** field appears with your user name selected. If you want to find documents with any status, or if you're not sure of the status, select *All* in the **Check Out Status** field.

Assigned To

If you want to limit your search to documents assigned to a particular user or group, click in the **Assigned To** field and select Users or Groups. Click the search icon next to the second field and select one or more users or groups for entry in the field. Note that the list of Users includes both Active and Inactive Users.

Codes

You can search for documents based on document codes, issue codes, workflow codes, or workflow categories. The type of codes that can be used vary by document type. Click the search icon next to any of the code or category fields to search for and select one or more codes.

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Notes

Document/Letter Name

You can search for a document based on its name. Click in the first field and select **Contains** or **Begins With** to find all document names containing or beginning with the string you enter in the second field. This string search is not case sensitive.

Description

To search for a document with a text string in the **Description** field, type the string in this field.

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Search Text

You can search for documents containing a word or words anywhere within the text of the document. Type the word for which you're searching in this field. If you're searching for a phrase, enclose the words in braces { }. Use the following operators to limit your search criteria.

AND	Use AND to search for documents with at least one occurrence of *each* term.	*budget and taxes* returns documents with both budget **and** taxes.
OR	Use OR to search for documents with at least one occurrence of *any* term.	*budget or taxes* returns documents with either budget **or** taxes.
NOT	Use NOT to search for documents with one term and not another.	*budget not taxes* returns documents with budget but only if they do not also contain taxes.
NEAR	Use NEAR to search for documents with terms that are near to one another.	*budget near taxes* returns documents where the term budget is near the term taxes.
ACCUM	Use ACCUM to search for documents with at least one occurrence of any term and rank according to the number found.	*budget accum taxes* returns documents with either budget or taxes, but those with both terms will receive a higher numerical ranking and appear at the top of the search results.

When you do a text search, each retrieved record is given a numeric ranking—the higher the score, the more relevant the record is to the text search criteria.

Document ID

If you know the ID of the record you're searching for type it in the ID field to go directly into that record. To find multiple records, separate IDs with commas (10795628, 10794468) or search for a range by entering a hyphen between the IDs (10794462–10794468).

Directory

To search for all documents within a directory, click in this field and select a directory. To search within all subdirectories of the selected directory, select the *Including Subdirectories* check box next to this field.

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Notes

Dates

You can search for letters based on their created, revised, review, or expiration date. Enter the beginning date that you want to search in the **From** field by typing a date in the field or by clicking the calendar icon next to the field and selecting a date from the calendar that appears. Enter the ending date in the **To** field in the same way. If you leave the **To** field empty, the search finds all documents with dates from the one in the **From** field to the current date. If you leave the **From** field empty, the search finds all documents with dates before and on the one in the **To** field. If you enter more than one range of dates, documents must meet all date criteria in order to be located with the search. For example, a search for documents created from 6/1/05 to 7/1/05 and documents with review dates from 6/1/05 to 7/1/05 will locate only those documents that were both opened and scheduled for review during the month of June.

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Notes

Quick Searches

If you're working on a draft form letter or want to review a draft press document, you can search for it or, if you created the document, you can also find it under **My Work**.

There are two types of searches available for documents: a quick search lets you select criteria from a drop-down list of document fields and combinations of fields; an advanced search lets you view and select all possible criteria on which you want to base your search.

How to perform a quick search for a document:

1. Click the **Documents** tab to go to the **Quick Search** page for documents. The **Search Documents for** field defaults to the criteria you've selected in Preferences. Which fields appear below the **Search Documents for** field will vary depending on your entry. Click in the **Search Documents for** field to select different criteria.

2. Click the **GO** button to begin the search and display the results.

3. If you're not satisfied with the results of your search, click the **Modify Search** link to modify your search or select the **Advanced Search** action to use more criteria in your search. You can also use the **Modify Search** option to add records to those already selected. If you selected records found with the first search, that selection is retained as you modify your search criteria and find and select additional records.

4. Click a document name link on the **Search Results** page to display information for that document.

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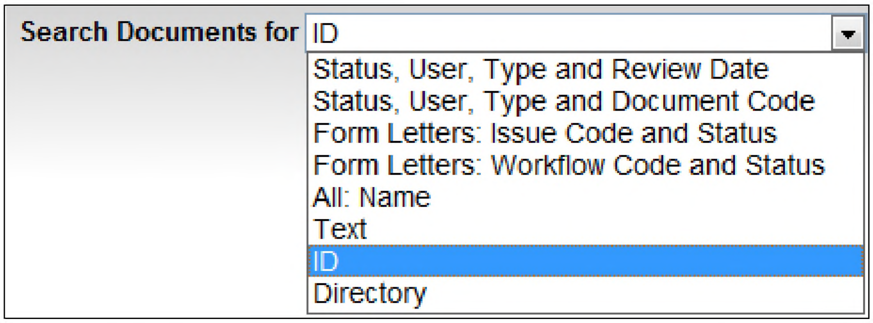
Quick Search Criteria

The Document **Quick Search** page provides fields that let you select pre-defined criteria for searching for documents.



A quick search lets you select from an existing list of fields or field combinations. Click in the **Search Documents for** field to display the list of available criteria, which include: **Status, User, Type and Review Date**; **Status, User, Type and Document Code, Form Letters: Issue Code and Status**; **Form Letters: Workflow Code and Status**; **All: Name**; **Text**; **ID;** and **Directory.** Once you've selected one of these options, the appropriate fields will appear below the **Search Documents for** field.

> Save your default search criteria, including field values, by setting the criteria and then clicking the Make Default link that appears at the top of the search criteria page.

Notes

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Notes

Searching for Documents - Results

The **Search Results** page shows all documents that met the criteria you entered on the **Quick Search** or **Advanced Search** page.

▸ Modify Search

Approved Documents (all types) Assigned To Any Users/Group -- 244 Records

Show 0 Selected << < Go To Page 1 # per Page 8 > >> Select All Clear All Configure

✓	#	Name ▲	Parent ID	Ver.	Created By	Assigned To	Status	Issue Code	Created Date	Expire Date	Type	Mail Usage
☐	1	0123 test	108580	1	QC	QC	Approved		10/08/2009		Form Letter	1 pending 1 completed
☐	2	106120	106120	1	QC	QC	Approved		07/23/2008		Form Letter	4 pending 0 completed
☐	3	106142	106142	1	QC	QC	Approved	BRHNT	07/24/2008		Form Letter	1 pending 0 completed
☐	4	106720	106720	1	User 5	User 5	Approved	ALTFUEL	11/14/2008		Form Letter	0 pending 1 completed
☐	5	106880	106880	1	QC	QC	Approved		12/05/2008		Form Letter	2 pending 0 completed
☐	6	107926	107926	1	Houda Taha	Houda Taha	Approved		04/28/2009		Form Letter	1 pending 0 completed
☐	7	107927	107927	1	Houda Taha	Houda Taha	Approved		04/28/2009		Form Letter	1 pending 0 completed
☐	8	2008 Appropriations	100301	5	Houda Taha	Cassandra Maida	Approved	BUD	05/13/2009		Form Letter	5 pending 2 completed

Show 0 Selected << < Go To Page 1 # per Page 8 > >> Select All Clear All Configure

The title of the page varies depending on your criteria. Actions at the left of the **Search Results** page let you edit, delete, and change the status of selected documents. You can view the document information by clicking the document name link. To view the document without checking it out, click the view magnifying glass icon next to the document name.

You can perform actions for multiple documents that appear on this page. Select the check box next to one or more documents (or click the **Select All** link to select all found documents), and then select an action for those documents. Actions that apply to documents on this page are unavailable until you select at least one document.

When you submit your search criteria by clicking the **GO** button for either a quick or advanced search, all documents that meet your criteria appear on the **Document Search Results** page. The number of documents found appears in the page title. Each document is numbered sequentially, and the sequential number is shown in the # column. 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 results, clear the field, type a different number, and press the TAB key. You can set the default number of records that you want to appear on the **Search Results** page through Document Preferences. Note that the more records per page, the longer it takes to display the results.

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Notes

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 document found: Letter Name, Parent ID, Version, Created By, Assigned To, Status, Document, Issue and Workflow Codes, Workflow Category, Created, Revised, Review and Expired Dates, Checked Out By, File Extension, Type and Mail Usage. You can view the document information by clicking the document name link. To view the document without checking it out, click the magnifying glass icon next to the document name. IQ also provides the ability to display the document or form letter text directly on the search results page if you have selected Show Expanded for the **Text Display Rule** in your user Preferences or a View link if you have selected Show Collapsed. Clicking the **View** link will display the text of the document or form letter framed within the grid.

> You can customize the Document Search Results page to show only the columns you want by right-clicking the column headings.

The **Actions** panel at the left of the page displays all available actions for records in the Search Results. Some actions are unavailable until at least one record is selected by clicking in the check box next to it. Actions include such things as adding a document, adding a form letter, deleting a document, assigning codes, checking documents in and out, uploading changes and changing security. 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 checkbox for the column names that you would like to display and click the Show button. Generally, the checkbox, number and ID columns cannot be hidden. Your settings for hidden columns will remain until you change them.

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Notes

You can print your search results by selecting the **Print** action. Check the **Print Each Row on New Page** check box to print one row per page when printing your output as HTML. This option does not apply to the Word or Excel output formats.

Printing Multiple Documents

You can print selected documents and form letters from the Document Search Results page using the **Download Files** action. Only the documents and form letters to which you have at least Read access for Record Security will be downloaded. This action requires Active Scripting to copy the files to the c:\iq\download folder on your workstation. Printing occurs from Windows Explorer to your workstation's default printer.

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Notes

How to print multiple documents and/or form letters:

1. Click the **Documents** tab.
2. Search for the documents you want to print.
3. Select the check box next to the documents and/or form letters you want to print.
4. Select the *Download Files* action. IQ displays the **Mass Download Files** dialog. For Form Letters, the Mass Download Files dialog will contain two radio options: *Printed view of the form letters selected* and *E-mail view of the form letters selected.* Select the desired view for downloading.
5. Click the *Start* button. The **Mass Download Files** dialog counts down the documents as they are downloaded.
6. When the download is complete, IQ displays the message "Windows Explorer will be used to present you with the downloaded files. To print the files through Windows Explorer, you will need to select all of the files (CTRL+A), open the File menu (ALT+F) and select Print (P). If any of the files have an extension which does not allow them to be printed, you will need to open and then print the files individually with the editor or viewer for those particular file types."
7. Click the *OK* button to close the message. Windows Explorer opens with the downloaded files.
8. Select one or more files to print and click *Print* on the **File** menu. For a single document, you can also use the *Print this File* action in the **File and Folder Tasks** pane.
9. Each selected file opens in the appropriate viewer and is sent to your default printer.

Deleting a Document

Deleting a document or form letter permanently removes it from the IQ database. You will be unable to delete a form letter that has been assigned to a mail record. Instead of deleting form letters that have been used, you should make them inactive. Inactive letters remain on the system and linked to mail records so that you have a permanent record of correspondence sent and the ability to produce a printed copy of the letter at any time in the future. Inactive letters are not available for new mail.

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Notes

How to delete a document:

1. Find the document you want to delete by searching for in Documents.
2. Click the document name to go to the **Document Record** page.
3. Select the *Delete* action and click the *Yes* button in response to the confirmation message.

It is also possible to delete multiple documents by selecting them in the search results or Document Directory grids and clicking the *Delete* action. Only users who have been specifically granted access to this action will see *Delete* as an available action.

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Notes

Document Reports

The following reports are available for the Documents module: Form Letter Usage by Status, Form Letter Usage Report, Letter Frequency Report and Pending Form Letters.

Form Letter Usage by Status

This report allows you to report on form letters by status. You can sort the report by code and status, status and code, completed or pending mail count. The Form Letter Usage report displays the following columns: Letter Name and Version, Status, Issue Code, Description and Usage (i.e. the number of Pending and Completed mail records containing the form letter).

Form Letter Usage Report

The Form Letter Usage Report lists the name of the Form Letter, its Status, who it's Assigned To, when it was created, the review date and the number of pending and completed mail records containing the form letter.

You can sort the report by letter name, creation or review date (ascending or descending) or by approval status and letter name. Choose the sort order by clicking in the Sort by field on the criteria page and selecting one of the six options. The report criteria also include the option to include Targeted Mail or Workflow Mail.

Letter Frequency Report

The Letter Frequency Report shows the names of all form letters in mail records with closed dates that fall within a specified range. The report does not check the Outgoing method, and reports on all methods (U.S. Mail, E-Mail, and so forth). You have the option to include Targeted Mail and Customized Letters. The report lists the form letter name and version (sorted by frequency of use), the number of times the letter was sent during the selected date range, and its percentage of the total letters sent during the date range.

Pending Form Letters

This report shows all form letters that appear in the Letter Name field of pending mail records. The report does not check the Outgoing method of the mail records, and reports on all methods (U.S. Mail, E-Mail and so forth). You have the option to limit the report to selected document owners, and sort it by Pending Mail Count, Letter Name or Document Owner. The report lists the form letter status (A for Active or I for Inactive), letter name, owner, description and total pending mail count. Note that the owner is the staffer in the Assigned To field of the form letter record and not the mail record. In addition, the total pending mail count includes the total number of people associated with the targeted mail record. So for example, a targeted mailing to 200 people would be counted as 200 in the total pending mail count for the form letter.

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Notes

How to run a Documents report:

1. Click the **Documents** tab.
2. Click the **Reports** submenu link to display a list of all available reports for the module.
3. Click the name of the report you want to run.
4. Select report criteria as required.
5. Click the **Run Report** button at the bottom of the page to view the report.
6. When the report appears, select **Print** on the **File** menu.
7. Close the report document after you've printed the report and then click the **Close** button.

Use the **Analyze** action in Lists or in the Search Results page for ad hoc reporting on selected records.

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Notes

Document Security

Record Security and Documents

Record security lets you restrict access to individual document records. When record security is turned on in system configuration, a **Record Security** action is available on the record page. Using that action, you can restrict record access to all or selected individual users, or to groups and departments. Record security is available for all types of documents. Your ability to secure workflow or document records is controlled by your User ID setting for the Record Security lock in each of those modules.

How to set security for a record:

1. On the record page, select the **Record Security** action.
2. In the **Record Security** dialog box, select the access to apply to all users by clicking in the **General Access** Level field, or set access for specific users by entering their names in an **Access Level** field.
3. Click the **Save** button.

General Access defaults to *Full*. Click in this field and select *Edit*, *Read*, or *None* if you want to restrict access to that level for all users. To limit access to specific users, groups, or departments, click the search icon next to the **Full**, **Edit**, **Read**, or **None** field and select the user(s), group(s), or department(s) to whom you want to assign that level of access. Users you select in this way are granted the specified level of access; all other non-selected users default to the General Access level.

Record security set for a specific user takes precedence over record security applied as part of a group or department. For example, if a user is given *Edit* access as an individual and is also part of a group that is given *Read* access, that user will have *Edit* access to the record. When a user belongs to more than one group or department, and the level of access for those groups or departments is inconsistent, the more permissive access is used. The same holds true when there is an inconsistency between group and department access.

Note that if security has already been set for a record, users with *Read* access will not see the **Record Security** action.

When a new version of a secured document is created, security will be carried forward to the new version. Likewise, if security is added to one version of a document, the user is prompted to add it to all versions.

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Access Levels

When a record is restricted, the user's access to it is determined by the access level.

Full – The user can view, edit, delete, and adjust security for the record.

Edit – The user can view and edit the record. All fields and all actions except **Delete** are available.

Read – The user can view the record. No fields are available and no actions appear that would modify record.

None – The user has no access to the record. If the record is found as a result of a search, no identifying information is displayed on the **Search Results** page. Instead, the user sees only the words Secured Record.

A user with *Full* access to a record cannot remove that access either as an individual or as part of a group or department. Only another user with full access to the record can do this. This limitation prevents a user from accidentally locking everyone out of a record.

Whenever record security is set or changed for a document, a notation is placed on the **Status Log** panel that shows the date, time, and user who changed the security. If record security is set for a document, the list of users that can be assigned to the document is limited to users with *Read*, *Edit* or *Full* access.

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Notes

Mass Update Record Security using Change Security

The **Change Security** action available on People, Mail, Workflow and Document search results grids allows you to replace Record Security on a group selected records with new security.

How to update Record Security for multiple records at once:

1. Search for the records to be modified using the People, Mail, Workflow or Documents search.
2. Select records to be updated by clicking in the checkbox to the left of each record.
3. Click the **Change Security** action.
4. Select the security setting that will *replace* the existing Record Security on all of the selected records.
5. Click **Save**.
6. Click **OK** to confirm the update.

Considerations for Change Security

Change Security *replaces* the security on selected records with new security. The only exception to this rule is the *No Change* designation available on the **General Access** drop-down. Selecting *No Change* will leave **General Access** to each of the selected records unchanged but will update security for **Users**, **Groups** and **Departments** as specified in the remainder of the **Overwrite Record Security** dialog box.

The **Overwrite Record Security** dialog box will show combined security settings for all of the records selected. This means that there will often be conflicts where a particular **User**, **Group** or **Department** is given one level of access on one record and a different level of access on another. The **User**, **Group** or **Department** will show up in BOTH boxes in the **Overwrite Record Security** dialog. This must be manually reconciled before the settings can be applied. Security settings will be made consistent among all of the selected records when the changes are applied.

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Notes

Documents Preferences

Document Search Preferences

Default Search – Click in this field and select *Quick* if you would like the **Quick Search** page to appear as your default Document Search. Select *Advanced* if you would like the **Advanced Search** to be your default Document Search. Select *Directory* if you would like the **Directory** submenu to appear when you access the Document module.

Default Quick Search – Click in this field and select the default search to appear in the **Search Documents** for field for a Quick Search. This will be used when you set your Default Search for Documents to *Quick* as well as when you select the *Quick* link on the Advanced Search for Documents page.

Records Displayed Per Page – Type the number of records that you want the Search Results page to display by default. You cannot display more than 300 records per page.

Form Letter Text Display Rule – This option allows you to select whether or not you would like the Form Letter text to appear in the Document Search Results. The default is *Do Not Show*. Click in this field and select *Show Expanded* if you would like the full text of Form Letters to appear or select *Show Collapsed* if you would like IQ to show a link that will display text when clicked.

Document Record Preferences

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

Default Form Letter Directory – Click in this field and select a default directory to appear when you add a new form letter. This directory appears in the Directory field in the Add Form Letter dialog box.

Default Form Letter Format – Click in this field and select the default format to be used when you add a new form letter. This format will be selected automatically in the Add Form Letter dialog box.

Default Document Directory – Click in this field and select a default directory to appear when you add a new document. This directory appears in the Directory field in the Add Document dialog box.

Default Document Workflow – Click in this field and select a default document workflow to be used with the **Add Document WF** action on the Document Record page.

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Notes

For More Information

More information on using the IQ Documents module and related features is provided in the IQ 3 Help, which is easily accessed by clicking the **Help** link above the module tabs in each IQ Module, and in the upper-right corner of record pages.

Contact your system administrator with questions regarding security for accessing the Documents module.

Contact your Lockheed Martin IT Consultant for more information.

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