Intranet Quorum® 3

Fundamentals

Notes

Introduction

Course Objectives

By the end of the IQ 3 Fundamentals course, the student will be able to create and edit People records, search for People records, add Mail records, load Mail Templates, search for Mail records, batch Mail, and create Custom Letters and Form Letters.

Intended Audience

This class is intended for anyone using Intranet Quorum 3 (IQ 3). It is a prerequisite to all other IQ 3 classes.

Notes

About IQ 3

When you log in to IQ 3, the My IQ home page is presented to provide quick access to your more frequently used features, tools, records, and modules. You can customize your own My IQ page to see only certain page elements, arranged and configured as you like. In addition, you can select the color theme and control the way Menu Tabs and Actions display in the My IQ page, and throughout IQ.

In the *Heading* of all main IQ pages, a Utility Bar provides links for easy access to IQ **Alerts**, **System Warnings**, **My Links**, **Recent** records, **Themes**, user **Preferences**, and on-line **Help**. The **Exit** link and **Universal Search** are part of the Utility Bar, as well.

Below the *Heading*, tabs appear on a *Module Menu* bar to provide fluid movement through all available IQ modules. Click a tab to switch to a different module, such as *People* or *Workflow*. Each module has its own *Submenu* and *Actions Menu* that are relevant to the types of functions performed, and records managed, in that module.

Most modules open to a *Search* page, where a *Quick Search* or *Advanced Search* for records can be performed. In the *Search Results* pages, check boxes appear next to the records found in the search, allowing you to select multiple records and take Actions on them by choosing from the *Actions* menu.

When a *Record* is accessed, a separate Record page is opened in front of the module page. The Record page contains all information relevant to that record. This information is organized on panels, and can be accessed by clicking the menu tabs that identify the individual panels. An *Actions* menu appears on the left side of each panel of a Record page. In addition to buttons (or text), some actions are represented by icons – ***Save***, ***Save and Close***, ***Close***, ***Refresh***, ***History***, and ***Edit Security***.

Links appear throughout IQ 3 and typically open a record or perform a function. A link is easily recognized by the underscore that appears when you place your cursor over it. Tool Tips are provided for most links and actions; and for fields in the Quick and Advanced Searches, and in record pages.

> When you log in to IQ, you access your office's database through Web pages. For optimal IQ functionality, **it is recommended you use Internet Explorer 8** or **9**. In addition, to maximize the amount of information visible on your screen, and minimize scrolling, **it is recommended you set the screen resolution to 1280x1024 (1280x800 for widescreen laptops)**.

Notes

Logging In to IQ

Clicking the *Intranet Quorum* (IQ) icon on a workstation's desktop will access the *IQ Log In* page.

How to Log In to IQ:

1. In the *IQ Log In* page, type your User ID in the **User ID** field.
2. Type your password in the **Password** field.
3. Click the [**Log In**] button.

If your office is configured for single sign-on, your IQ Log In page will not include the *User ID* and *Password* fields. Click the [**Log In**] button to launch IQ.

If you need to log in as a different user than the one shown, or into a different IQ account, click on the **Login with a different User ID or Account** link. The Log In page will refresh to display the *User ID*, *Password*, and *Account* fields.

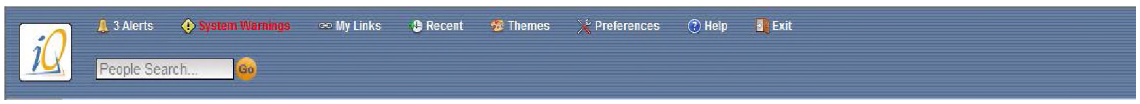
Notes

Utility Bar Options

The Utility Bar appears in the Heading at the top of all main IQ pages. A Utility Bar option called *Themes* enables you to choose the way the Heading, Utility Bar, and other page elements appear.

This Heading is set to *Large*, and the Utility Bar is *Right* aligned.

This Heading is set to *Large*, and the Utility Bar is *Left* aligned.



This Heading is *Small*, and the Utility Bar is *Right* aligned.

Alerts – Click on the **Alerts** link to retrieve all of your alerts into the *Alerts* page; or hover on the **Alerts** link to list the number of Alerts you've received of each type. When the list appears, click on the specific type of Alerts you want to access – Discussion, Mail, Workflow, Event, etc. – to retrieve them into the Alerts page.

System Warnings – Click on this link to view *System Warnings* at any time. Warnings include, but are not limited to, the processing of incoming e-mail, replication failures, the number of items in your *Exception Set*, and the *System Administrator Checklist*.

My Links – Hover here to display links to your favorite Web sites, and then click on a link to go to that site (opens in a separate window). These links are attached to your IQ User ID, so you can access them from any IQ workstation. To create your links, just click **My Links** on the *My IQ* submenu, then click the **Add New Link** action. The *My Links* section also includes links to saved searches, which are searches you have saved while in a *History Log* or *Search Results* page.

Recent – Hover here to display the last ten *People*, *Mail*, *Workflow*, *Document*, *E-Survey*, *Event*, *Legislative Action*, *Vote*, *Board*, *Board Member*, *User*, and *CSB* records you accessed in IQ. Click on a record link to open the record.

Themes – Themes enable you to choose the way IQ looks. Hover your mouse pointer over the *Themes* link to see currently selected Theme options displayed as gray text. Click on an option displayed as blue text to select it.

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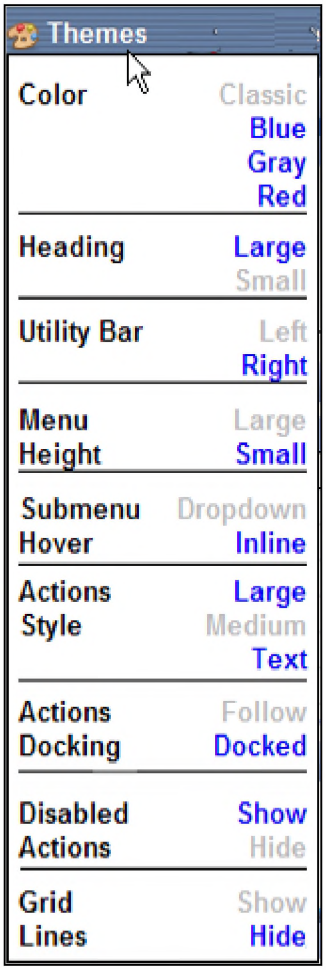


<u>Color:</u> choices are **Classic** (similar to those in earlier versions of IQ 3), **Blue**, **Gray**, or **Red**. The color you select will be used in the IQ Module Bar, Actions Menu, Record pages, and Search Results.

<u>Heading</u>: determines the size of the area where the IQ Logo and Utility Bar appear. Select **Large** or **Small**.

<u>Utility Bar</u>: select **Left** to have a left-aligned Utility Bar; or **Right** for a right-aligned Utility Bar.

<u>Menu Height</u>: controls the size of tabs on the IQ Module Bar, as well as in Record Pages. Select **Large** or **Small**.

<u>Submenu Hover</u>: select **Dropdown** to see a drop-down list of submenu options when you hover over a Module tab, or **Inline** to see submenu options displayed in a horizontal line.

<u>Actions Style</u>: select **Large** or **Medium** to display actions as buttons that match your Theme Color. Select **Text** to display actions as regular links.

<u>Actions Docking</u>: **Follow** allows actions to remain visible as you scroll down in the page; with **Docked** they are stationary.

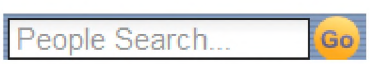
<u>Disabled Actions</u>: disabled actions are those not currently available for use. Select **Show** to see active and disabled actions; select **Hide** to see only active actions.

<u>Grid Lines</u>: select **Show** or **Hide** to determine if grid lines separating data on *Search Results* pages are visible or not.

Preferences – User Preferences enable you to customize your use of IQ by setting defaults in many areas of IQ. Click this link to open the *Preference Settings* record page for editing. *For descriptions of available user Preferences, click the Help icon.*

Help – Click on this link to launch the IQ 3 on-line Help in a separate window.

Exit – Click this link to log out of IQ.

Universal Search – 

This field lets you search for all records of a certain type (People, Mail, Workflow, or Calendar) associated with the person whose name you enter. First, click in the field and select the type of records you want to retrieve (selected type is outlined in red). Next, enter the name of a person as found in People, as a Correspondent in Mail, as a Primary Person in Workflow, or as an attached Person in Calendar, and then click the **Go** button. IQ returns all records of the chosen type that are associated with a person whose name matches the one you entered.

For a Document search, select the *Document* icon, enter a word or phrase that appears in the name or contents of any document or form letter record, and then click **Go**.

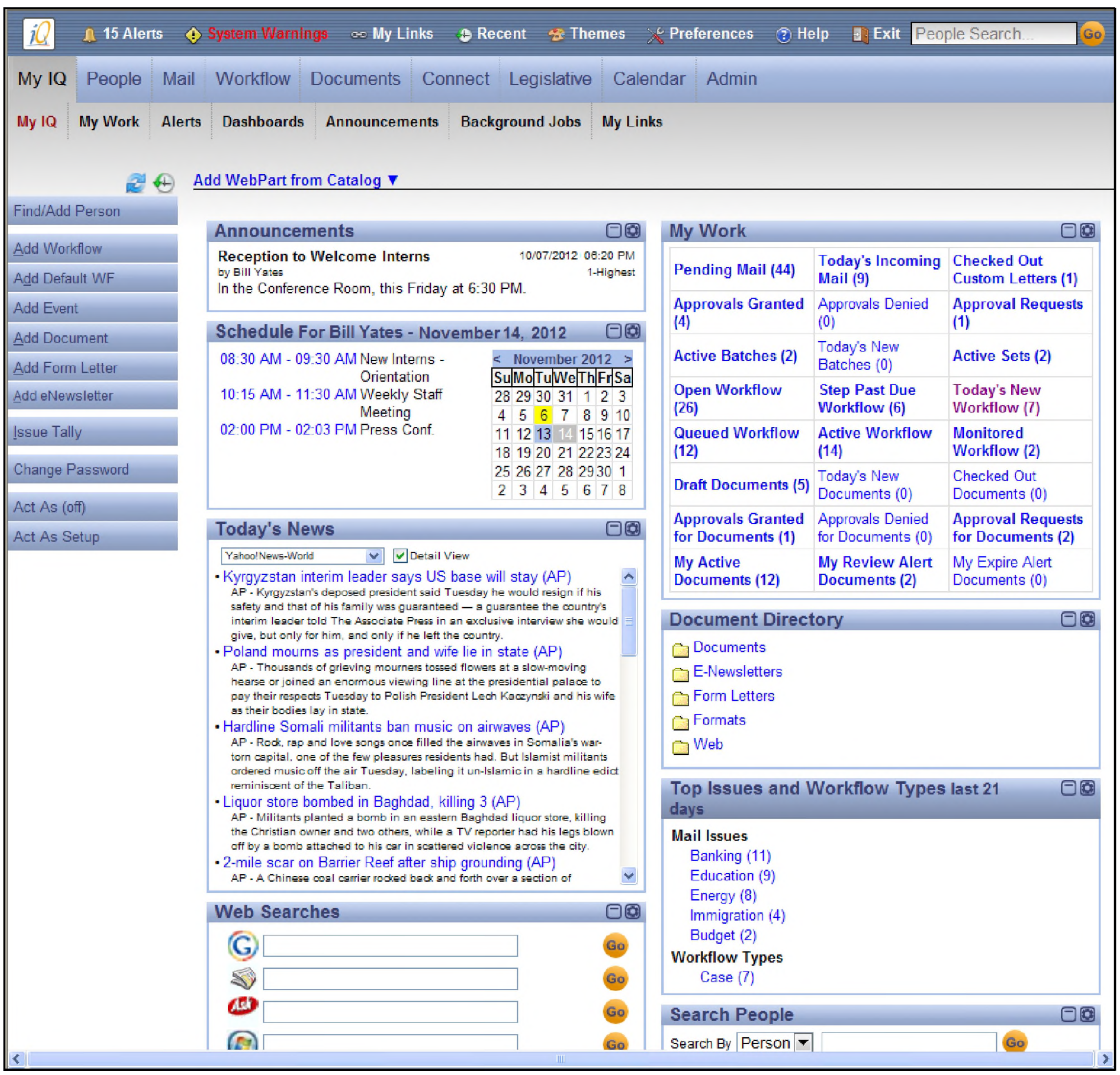
Notes

My IQ

You enter IQ in the *My IQ* home page where the submenu, actions, and customizable Web Parts give you quick access to your frequently-used options and pending work.

The My IQ *submenu* has links to access *My Work* (in a separate window), *Alerts*, *Dashboards*, *Background Jobs*, and *My Links*. An *Announcements* submenu link is included if your user security settings allow you to create and edit Announcements.

Actions provided on the *Actions* menu at the left side of the page enable you to find or add People records as well as add new Workflow, Events, Documents, Form Letters, and eNewsletters. In the Web Parts area, the *My Work*, *My Schedule*, *Document Directory*, and other web parts are displayed initially; but users can add, remove, and edit web parts.



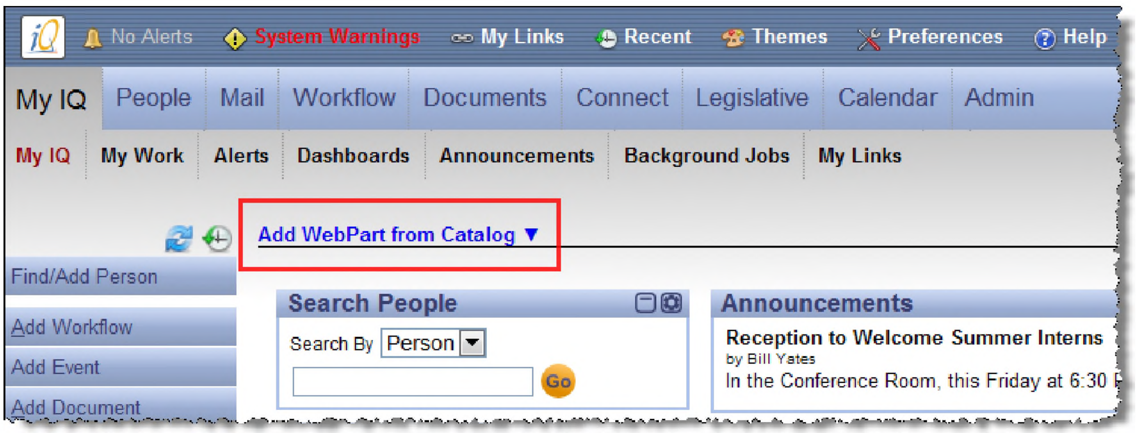
Notes

Customizing with Web Parts

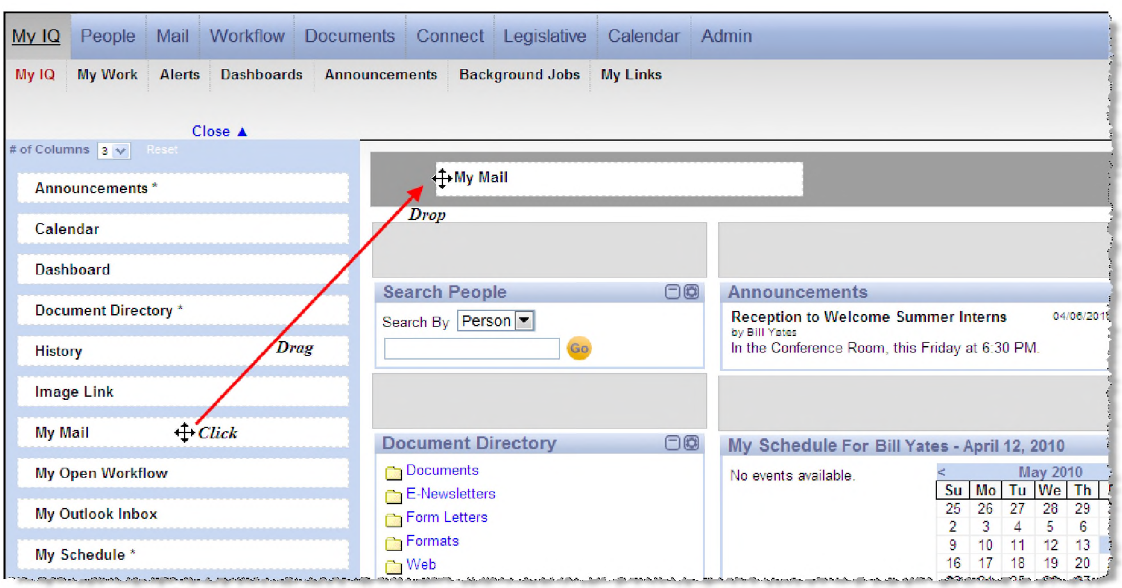
The first time you log in to IQ, the *My IQ* page displays an area with multiple sections, called web parts, containing various types of data and functionality that enable you to quickly locate and perform your work in IQ. The web parts included in the *My IQ* page by default are *Announcements*; *Document Directory*; *My Schedule*; *My Work*; *People Search*; *Recent People, Mail and Workflow*; and *Top Issues and Workflow Types*. You can use these web parts as they are, or customize the page by determining which are included, where they are located, and how they look.

Adding Web Parts

To add a web part to the My IQ page, click on the **Add WebPart from Catalog** link at the top of the Web Parts area.



The Web Part Catalog will display on the left side of the page. Position your cursor on the web part you want to add; and then click, hold, and drag the web part to the area in which you want it placed. When that area turns dark gray, drop the web part.

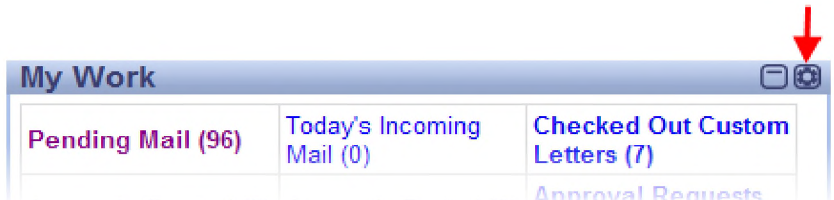


Notes

Editing Web Parts

Each Web Part has settings for *Appearance* and *Layout*. Appearance settings include *Title*, *Chrome Type*, *Direction*, *Height*, and *Width*. Layout settings determine if the web part is Normal or Minimized by default, in which zone it appears, and in what order within the zone. In addition, several web parts have content-specific options; for example, My Work has check boxes for selecting the links to include in the section.

Edit: to edit a web part, click on the **Edit** icon in the upper-right corner of the web part.



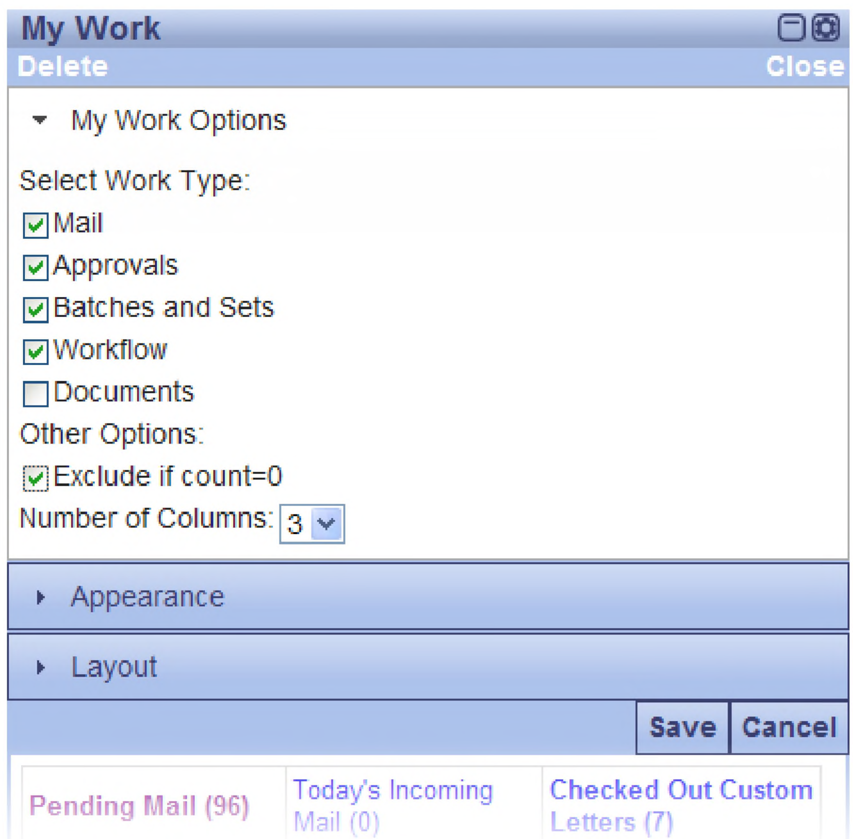
The Web Part will expand to show content-specific *Options*. If none exists for the web part, the *Appearance* settings will be expanded for editing. Click on *Layout* if you want to edit layout settings.

Save: Click on the **Save** button to save your changes and collapse the web part.

Cancel: To cancel changes without saving, click the **Cancel** button.

Delete: To remove the web part from your My IQ page, click on **Delete**. (*The web part will be available to add to the My IQ page later, with its default settings.*)

Close: Closes the web part without saving changes.



→ **Note**: For complete descriptions of Options, Appearance, and Layout settings for all Web Parts, click on **Help** in the heading of the *My IQ* page.

Notes

My IQ - Actions

My IQ *Actions* are located at the left side of the page. The **Refresh** and **History** actions appear as icons.

Refresh resets the My IQ page to include recent changes to records; and

History opens a window displaying links to records you've accessed, and searches you've performed, while working in IQ over the past ten days.

Other actions appear as buttons or text, depending on your *Actions Style* setting under *Themes*. Several are used for creating records - **Find/Add Person**, **Add Workflow**, **Add Default WF**, **Add Event**, **Add Document**, **Add Form Letter**, and **Add eNewsletter**.

The **Issue Tally**, **Change Password**, **Act As** and **Act As Setup** actions are available for users whose security settings allow them.

The My IQ *Actions* menu remains visible as you scroll down the page, or stays docked at the top, depending on your currently-selected *Actions Docking* parameter under *Themes* (hover your mouse pointer over **Themes** on the *Utility Bar*, and select **Follow** or **Docked** in the *Actions Docking* section).

Find/Add Person

The *Find/Add Person* action, as its name implies, is used to find and access People records already stored in the database, or to add new People records.

Name and Address information can be entered in the *Name and Address* field shown below, much like addressing an envelope, and IQ will search the database for potential person and household matches to display in the page. In addition, an e-mail address or phone number can be used in the *Name and Address* field for searching. When searching based on a phone number, enter the identifier tag "p:" in front of the phone number, which can be entered with or without formatting, for example, **p:7032060030**.

If no potential matches exist, a new People record is created automatically and populated with the Name and Address information. This allows for quicker data entry!

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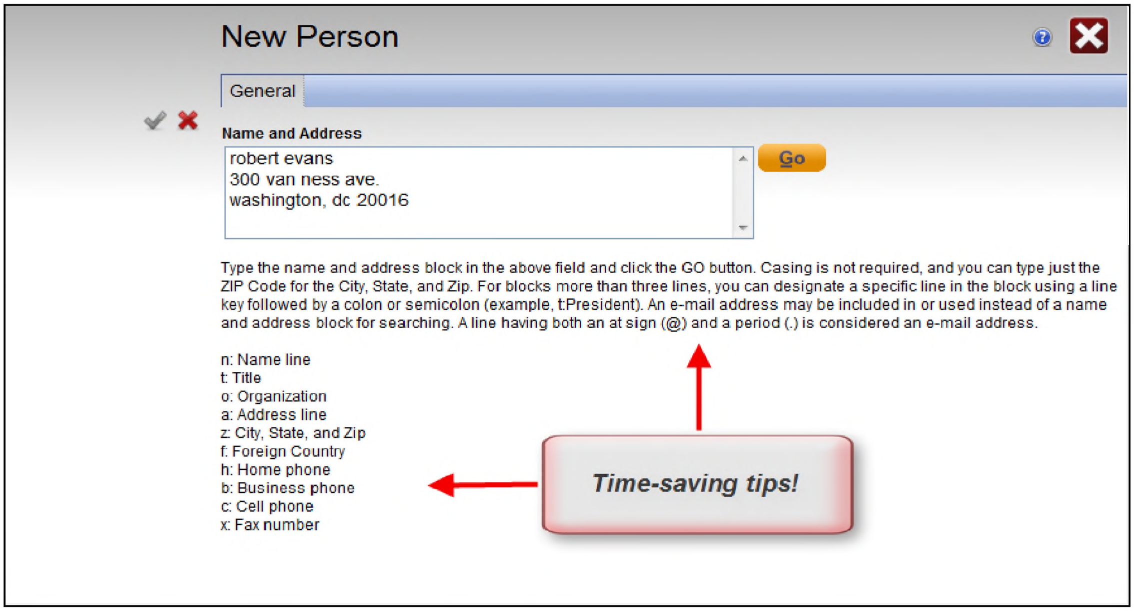

Names that Begin With a Lower-Case Letter

To prevent the capitalization of the first letter in a name, type a carat ^ (**Shift+6**) in front of the part of the name that begins with a lower-case letter (e.g. ^de ^la Cruz). The caret (^) is used only when creating a record; it will not appear in correspondence or printed reports.

Entering Two-Word First, Middle, or Last Names

To enter a two-word first, middle, or last name, type an underscore character between the words when you type them in the label field. For example if you type the name Mary_Beth Mac_Taggart, Mary Beth is entered in the *First* field and Mac Taggart is entered in the *Last* field.

Copy (Ctrl-C) and Paste (Ctrl-V) can be used in the *Name and Address* field when searching certain pieces of data multiple times, i.e. titles, organizations, zip codes, etc.

Adding a New People Record

The **Find/Add Person** action easily accommodates the two situations when a new People record needs to be created for a person:

- There is no existing People record with a matching name <u>or</u> address;
- There is no existing People record with a matching name, but there is one with a matching home address (a member of the same household).

Notes

How to Create a New People Record:

1. In the **My IQ** page, click **Find/Add Person** on the *Actions* menu.
2. Type the name and address of the person, as shown above. (An e-mail address or phone number also can be searched in the *Name and Address* field).
3. Click the [**Go**] button.
4. IQ will show you a list of possible people or household matches.
5. Choose one of the following:
   - Click the [**New**] button to add a new People record in its own, new Household.
   - Click the [**Household**] button next to an existing People record to add a new People record as a member of that Household.
6. Enter additional name and address information into the fields, if needed.
7. Click **Save and Close** on the *Actions* menu when finished; or click the **Add Another** action to save the new record, and find/add another People record.

Entering more information in the Name and Address field of the New Person search page can save you time, because that information is parsed automatically and entered in the appropriate fields in the New Person record page.

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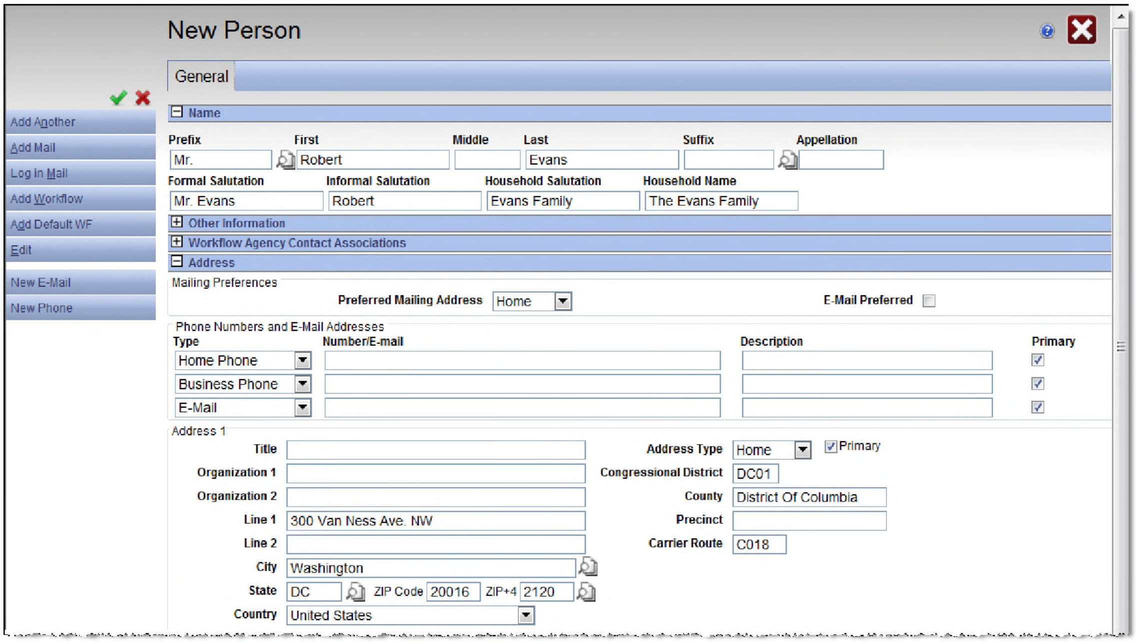


You can expand or collapse a section in a *New Person* record by clicking on the [+] icon or [–] icon within the section heading. The section will remain that way in subsequent *New Person* records until you click to change it again (even after you log out of and back in to IQ).

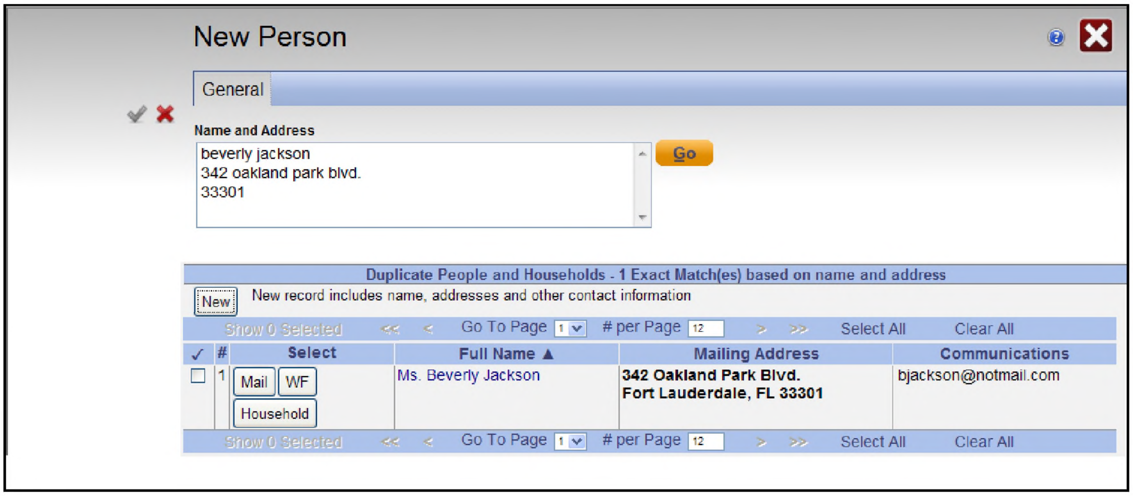
Adding Mail for a New People Record

Mail records are added to People records to record their incoming correspondence, and for sending correspondence. If you need to add a Mail record for a People record you are creating, you can do so within the *New Person* record page. Just click the **Add Mail** action and IQ will create a new Mail record linked to that (saved) People record. The Mail record is opened automatically for editing.

If necessary, you can switch to editing the linked People record by clicking on the **Return to Person** action on the *Actions* menu (the new Mail record will appear on the *Mail* panel of the People record).

Accessing an Existing People Record

The *Find/Add Person* action also makes working with an existing People record easy. Any matching People record displayed in the *Find/Add Person* search results can be accessed directly for editing; or a new Mail record or Workflow can be added and linked to the People record.



How to Access an Existing People Record:

1. In the **My IQ** page, click **Find/Add Person** on the *Actions* menu.
2. Type the name and address of the person, as shown above (an E-Mail Address can be searched in *Name and Address* field, also).
3. Click the [**Go**] button.
4. IQ will show you a list of possible person or household matches in the database.
5. Choose one of the following:
   - Click the person's **name** link (in the *Full Name* column) to edit the People record.
   - Click the [**Mail**] button to add new Mail for the person.
   - Click the [**WF**] button to add a new Workflow for the person.

The results of your *Find/Add Person* search can be re-sorted by clicking the **Full Name** or **Mailing Address** link. In addition, you can refine and re-run your search easily by editing information in the **Name and Address** field and clicking the [**Go**] button.

Notes

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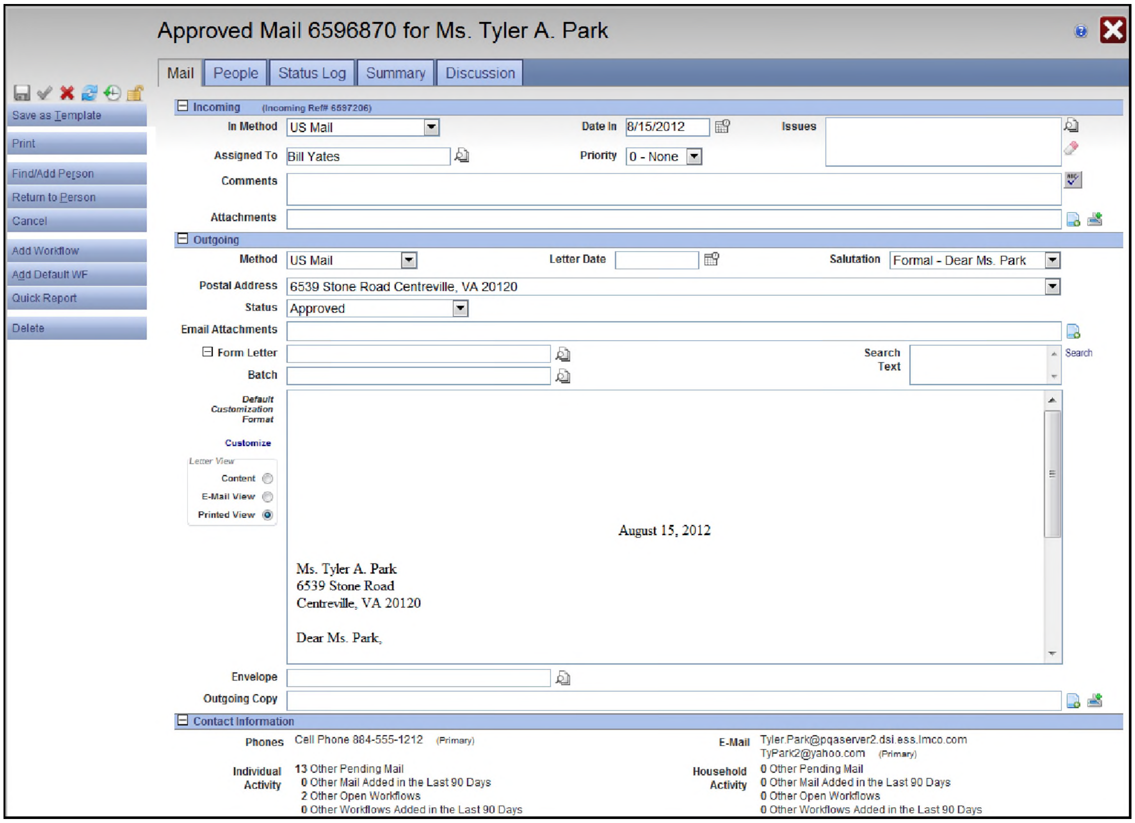
Adding Mail for an Existing People Record

When you click the **[Mail]** button next to a person's name in the *Find/Add Person* results, IQ bypasses the People record, and automatically opens a new linked Mail record page for you.



Options for generating a letter from the mail record:

- In the *Form Letter* field, click the search icon and choose from the list of available Form Letters. This list will include Form Letters having a status of *Approved*, along with Form Letters that are not yet *Approved* but are designated as being *Assignable* in Mail.
- While leaving the *Form Letter* field blank, use the **Customize** option link to compose a completely new letter. This is a Custom Letter intended for just that one person.
- In the *Form Letter* field, click the search icon and choose from the list of available Form Letters; then, click the **Customize** option link to create a new, unique letter using the Form Letter as a starting point. This also is a Custom Letter and is intended for just that one person.

Notes

How to Assign a Form Letter in a Mail Record:

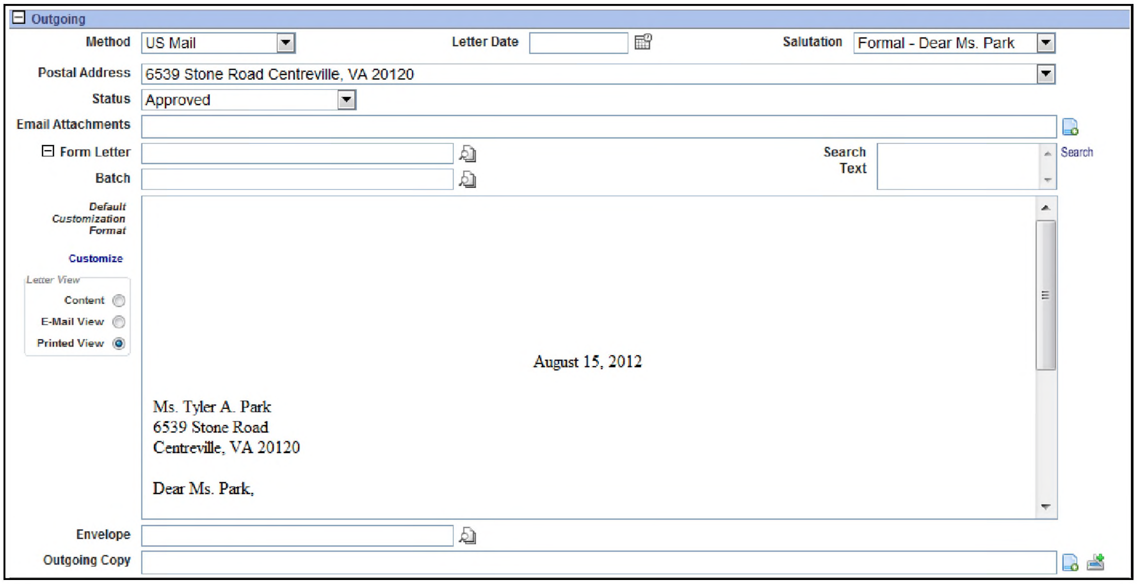
1. Find or add a People record using the **Find/Add Person** action, and add a Mail record for it.
2. Set the fields, such as *In Method, Date In, Issues, Assigned To, (Outgoing) Method, Postal Address,* and *Salutation*, as needed.
3. Click on the **Form Letter** search icon to select a Form Letter. In the dialog box that opens, you can:
   - double-click on a letter name in the left pane to select it.
   - single-click on a letter name in the left pane to display that letter in the pane to the right.
   - use the *E-mail View* and *Printed View* option buttons in the upper-right corner to view a letter's content with its E-Mail Format or Print Format.
   - Click **Save** to select the displayed Form Letter for use in the Mail record.
4. Back in the Mail record, the selected letter will be displayed in the *Preview Pane*.
5. Enter values for any *Fill-In* fields that appear for the letter (refresh the page to see the fill-in values in the form letter).
6. Click in the **Status** field and select ***Approved*** (if needed).
7. Place your pointer over the **Print Mail** action and click **Print Final** from the slide-out menu to merge the letter for final printing. *This action changes the status of the Mail record to* Completed.
8. Click **Save and Close**, or **Close**, on the *Actions* menu.

The list of Form Letters displayed in the *IQ Select Letter* window, by default, contains letters assigned to the Issue Code(s) entered in the Mail record. If there are no Codes in the Mail record, *Show All* is automatically used, instead. Other buttons available in the window are *Recently Used, Formats Only,* and *Library Search.*

Creating a Custom Letter

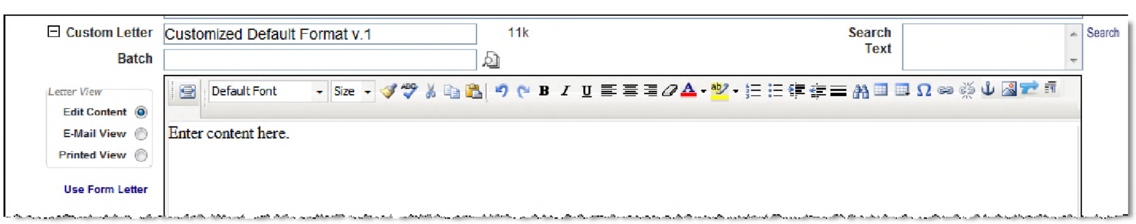
In the *Outgoing* section of the Mail record page, a Custom letter can be created based on your Default Custom Letter Format, or on a selected Form Letter. Both types of Custom Letter can be created using the HTML Editor built into the Mail record page.

Notes



How to Create a Custom Letter (not using Form Letter Text):

1. Edit or add a People record using the **Find/Add Person** action, and add a Mail record to it.
2. In the Mail record, set the fields, such as *In Method, Date In, Issues, Assigned To, (Outgoing) Method, Postal Address,* and *Salutation*, as needed.
3. Click the **Customize** option link to the left of the Preview Pane. The Custom Letter is created based on your default format, and opened in the built in HTML Editor (*in place of the Preview Pane*).
4. In the Editor, remove the text **"Enter content here"** and type the actual body of the letter.
5. Enter a letter name in the **Custom Letter** field (optional).
6. Click the **Status** field and select *Approved*, if needed.
7. Hover your pointer over the **Print Mail** action on the *Actions* menu, and select **Print Final** from the slide-out menu. *This action changes the status of the Mail record to* Completed.
8. Click **Save and Close** ✔, or **Close** ✖, on the *Actions* menu.



Notes

How to Create a Custom Letter (using existing Form Letter Text):

1. Find or add a People record using the **Find/Add Person** action, and add a Mail record to it.
2. In the Mail record, set the fields, such as *In Method, Date In, Issues, Assigned To, (Outgoing) Method, Postal Address,* and *Salutation*, as needed.
3. Click on the **Form Letter** search icon to select a Form Letter. In the dialog box that opens, you can:
   - double-click on a letter name in the left pane to select it.
   - single-click on a letter name in the left pane to display that letter in the pane to the right.
   - use the *E-mail View* and *Printed View* option buttons in the upper-right corner to view a letter's content with its E-Mail Format or Print Format.
   - Click **Save** to select the displayed Form Letter for use in the Mail record.
4. Enter values for any *Fill-In* fields that appear for the letter (refresh the page to see the fill-in values inserted in the letter).
5. Click the **Customize** option link to the left of the *Preview Pane*. The Custom Letter is created based on the selected Form Letter, and the body of the letter is opened in the built-in HTML Editor (*in place of the Preview Pane*).
6. Edit the body of your Custom Letter as desired.
7. Click the **Status** field and select **Approved**.
8. Hover your pointer over the **Print Mail** action on the *Actions* menu, and click **Print Final** on the slide-out menu. *The status of the Mail record automatically is changed to* Completed.
9. Click **Save and Close**, or **Close**, on the *Actions* menu.

To enter a value in a multi-valued field, such as an *Issues* field, you can type part of the code or translation in the field to get a list of possible matches; and then click on a code to select it (or *arrow down* to the code and hit **Enter** or **Tab** to select it).

To deactivate this auto-complete feature throughout IQ, click **Preferences** on the Utility Bar and select the **Do Not Show Possible Code Values When Typing** check box on the *General* panel.

Notes

To collapse and expand the editor, click on the **Resize** icon in the bottom- right corner of the *HTML Editor* pane:

Convert to New Form Letter – Click this action to copy the text of the Custom Letter into a new Form Letter. This action does not appear until the *Customize* option link has been selected.

How to Convert a Custom Letter to a New Form Letter:

1. Create a Custom Letter in a Mail record.
2. Click the **Convert to New Form Letter** action.
3. Click the [**OK**] button to confirm. A new *Document Record* opens for the new Form Letter (Envelope or Email Subject is copied from Mail).
4. In the *Document Record* page, click in the **Letter Name** field and enter a name for the new Form Letter; complete all other fields as needed.
5. If the letter needs to be edited, click the **Edit Content** option button and edit the letter.
6. Optionally, to select a different *Print Format* for the new form letter, click the Print Format tab and select one from the Print Format Source drop-down list. To select a different *E-mail Format* for the new form letter, click the E-mail Format tab and select one from the E-mail Format Source drop-down list.
7. Click the **Close** action to exit the Document record.

Notes

Using a Mail Template

When you need to add multiple Mail records that will include the same information, you can create a mail template with information to be repeated from record to record. The template can contain incoming information, issue codes, response information, attachments, and any other data you wish to repeat. Once you've created a template, you can use it to repeat the mail information when recording new incoming mail, and responding to previously entered or logged-in Mail.

How to Create and Use a Mail Template:

1. In a Mail record, enter all information to be repeated in subsequent Mail records. This can include assigning a Form Letter, selecting an Issue Code, entering the Mail in a Batch, etc.
2. Click **Save as Template** on the *Actions* menu, and click [**OK**] to proceed.
3. Click **Save and Close** on the *Actions* menu.
4. Create or edit another Mail record in which you want to use your Mail Template. *Note*: Template features prevent the overwriting of certain information saved in an existing mail record – click *Help* for details.
5. Click the **Load Template** action on the *Actions* menu.

If you create a new mail record and select **Load Template**, the **In Method** and **Date In** fields are overwritten by Template data. Information in the **In Method** and **Date In** fields is not overwritten by Template data when you load the Template in a previously saved Mail record. Template comments are appended to existing comments. These features prevent losing information entered when the mail was logged in.

In the process of loading your Mail Template into Mail records, you can change information for a specific Mail record without altering the Template. To do so simply access the Mail record, click the **Load Template** action, make the change, then **Save and Close** the Mail record. The Mail Template remains the same, but that specific Mail record will contain the change.

To alter the Mail Template, access a Mail record, click the **Load Template** action, make changes to a field, or fields; and then click the **Save as Template** action. When prompted, click [**OK**] to save the changes in your template.

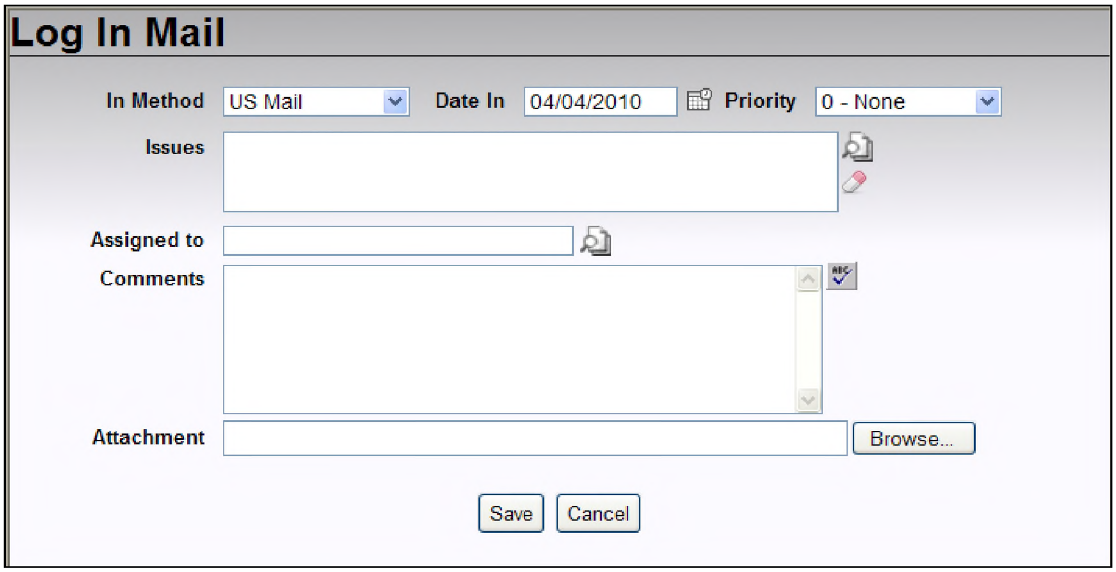
In a People record, use the **Load Mail Template** action to add a new Mail record with the Template already loaded. In People search results, select a person or multiple people and click **Add Mail (Template)** to load your Mail Template.

→ ***Note:*** The saved Mail Template is retained only for your current IQ session. If you log off, you will need to re-enter Mail information and use the **Save As Template** action to create a new template.

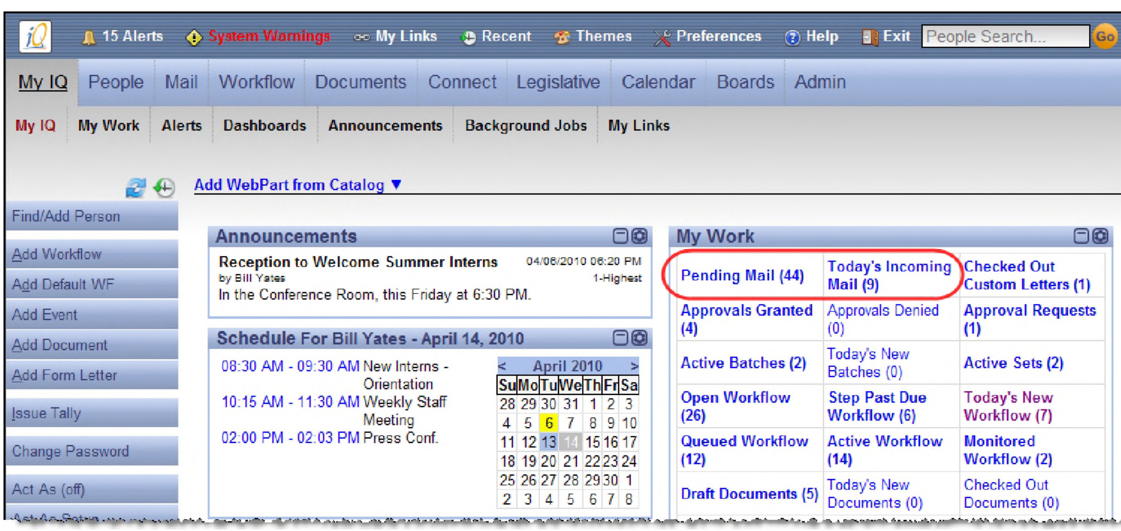
Notes

Log in Mail

The *Log in Mail* action lets you record incoming mail as it arrives, and assign it to the appropriate staff person. An Attachment field lets you browse to and attach a file. The Response Information fields are not included in the *Log in Mail* window, as the Mail is being passed to another user for response (it will be part of the resulting Mail record). After saving the *Log in Mail* entry, the correspondence appears in the People record, as *Pending Mail* on the Mail panel.



The assigned user can access the new Mail record from the My IQ page if the *My Work* web part (shown below), or the *My Mail* web part, is included in the page.



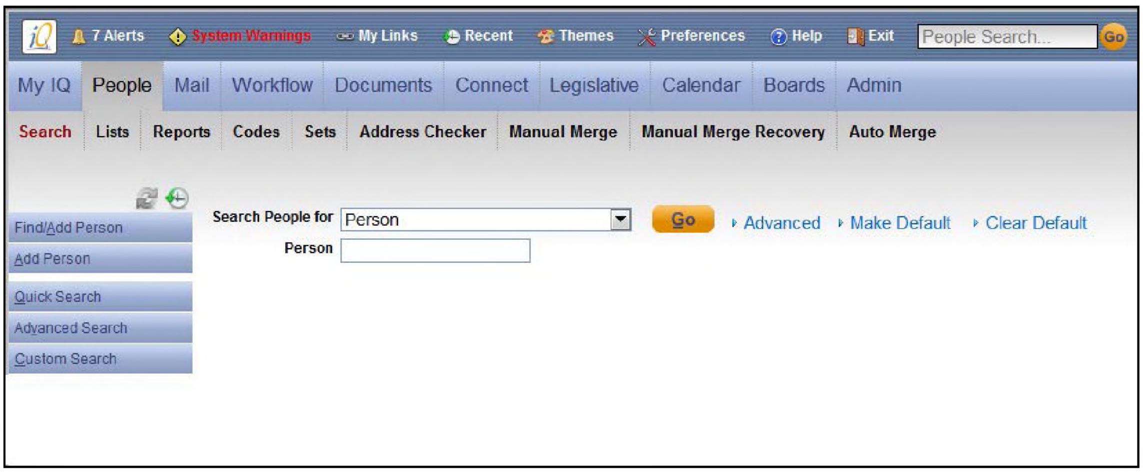
In addition, it can be retrieved by other users from the Mail Explorer page, using Quick or Advanced Search.

Other IQ Modules

From the My IQ page, you can move to another IQ Module by clicking one of the tabs on the **Module Bar** – *People*, *Mail*, *Workflow*, *Documents*, *Connect*, *Calendar*, or *Admin*.

In each module, a ***Submenu*** appears below the tabs on the Module Bar; and an ***Actions*** menu appears at the left side of the page. When a Module is chosen, the *Submenu* and *Actions* reset to display the functions available in that particular module.

Certain submenu links, such as ***Search***, ***Lists***, ***Reports***, and ***Codes***, appear in several modules. ***Search*** and ***Reports*** are specific to the module you are accessing. For example, click on **Reports** in the *People* module, you get People Reports; click on **Reports** in the *Mail* module, you get Mail Reports, and so on.



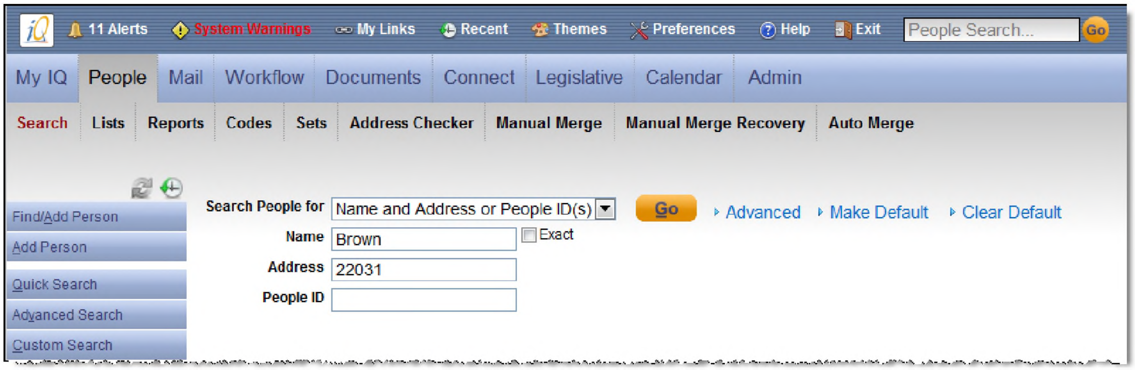
Explorer Pages

Explorer pages in each module, allow you to run Quick and Advanced record searches based on information maintained in the module you're in.

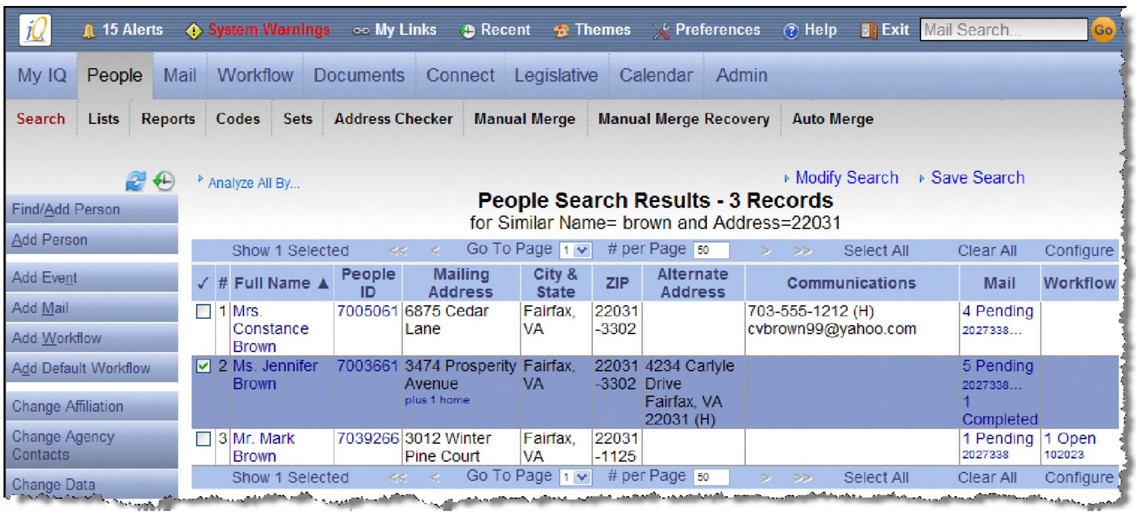
- Quick Search – Lets you choose one of several pre-defined criteria. The list includes common, basic search criteria such as *Name and Address*.
- Advanced Search – Lets you build your searach criteria from an extensive list of fields/data that can be combined for a more complex search.
- Make Default – Stores the current search type (Quick or Advanced) and all criteria field settings, as your default for that Explorer. As a result, the page will open with these same settings each time you click on the ***Search*** submenu link to open that Explorer.
- Clear Default – Click to return to using no default for the current Explorer.

Notes

Notes



Results from these searches appear in a ***Search Results*** page providing links to access the searched records, as well as check boxes that enable you to choose multiple records on which to take an action.



The **Actions** menu in a Search Results page contains certain actions that can be taken on all records that have been checked. These actions are specific to the type of records displayed on the page, and are only active when at least one record on the page is checked.

Other Actions on the menu are available at all times, for example:

Refresh – re-displays records on a page to include recent changes or additions.

History – opens a window displaying links to records you've accessed, and searches you've performed, while working in IQ over the past ten days.

Print – Records in the page are output to an HTML form, MS Word, or Excel; to be sent to a printer, or saved in a file.

These other convenient features are included in *Search Results* pages:

Notes

Re-sort records based on field data by clicking on a column heading (switch between ascending and descending order by clicking again).

Hide a column by placing your mouse cursor near a column heading; if a plus sign (+) appears it means the column can be hidden. With the + displayed, right click to see the hide/show options. Under *Hide Column:* click the (*column name*) button to hide that column.

Show hidden columns by placing your mouse cursor near a column heading until the plus sign appears, then right-click and check the boxes next to the hidden columns you want to show. Click the **Show** button to show the selected columns.

➔ *Note: Each time you reset the sort column/order, or change which fields are hidden and shown in a Search Results page, those new settings automatically become your **Default Sort** and **Hide/Show Column Settings** for that type of Search Results, even in subsequent IQ sessions.*

Paging – Click the > symbol to move to the Next page.

Click the < symbol to move to the Previous page.

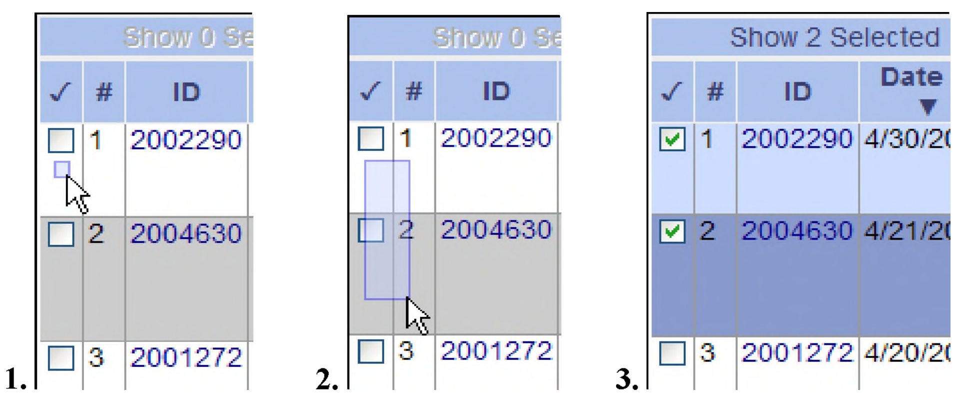
Click the >> symbol to move to the Last page.

Click the << symbol to move to the First page.

Go to Page – click the drop down arrow and choose the page to display.

 # Per Page – enter a number in the **# per Page** field to reset the number of records displayed in each page for that type of Search Results. The new setting becomes your default # ***per Page*** for this session, and subsequent IQ sessions, until you change it.

Click and Drag to Select – Place your cursor in the check-box column (below the box); then click, hold, and drag the mouse over the records to be selected.



Notes

Checkmark – Click the **checkmark** above the check-box column to select only the records on the current page; click again to uncheck those records.

Select All link – Click to select all records in the Search Results.

Clear All link – Click to clear all selected records in the Search Results.

Show # Selected link – Click to display only selected records in the Search Results.

Show All link – Click to display all records in the Search Results.

Analyze All By link **–** analyze all records in the Search Results, based on a wide variety of data elements, and display them in a format such as a Bar Graph or Table. (Available for *People*, *Mail*, *Workflow*, and *Documents* Search Results.)

Modify Search link – Click to return to the Explorer page and modify your search criteria (records currently selected will remain selected).

Save Search link – Click to add the search as a link under My Links in the My IQ page.

If you're not satisfied with the results of your search, click the **Modify Search** link to alter your Quick Search or Advanced Search criteria.

The *Modify Search* link is also used to add records to those already selected in the Search Results page. If you select records found with the first search, that selection is retained when you modify your search criteria, and then find and select additional records in the new Search Results page.

Actions taken on the Search Results page will affect **all** selected records, so it is very helpful to use the ***Show # Selected*** link (above or below the check box column) to determine what records you currently have selected. To uncheck all selected records, click the **Clear All** link.

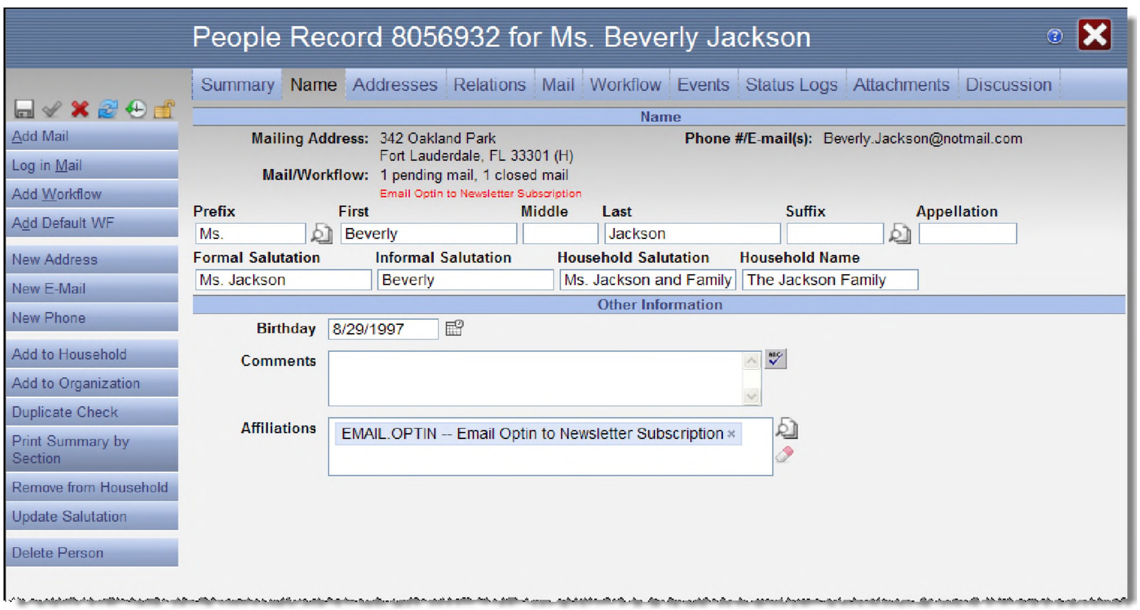
> In addition to the paging-style Search Results (above), the *Mail* and *Workflow* modules provide a scrolling-style Search Results page as a faster way to view and access a large number of records by eliminating the need to select the number of records per page. As you scroll, IQ continues to retrieve and display records into the search results.

People Module

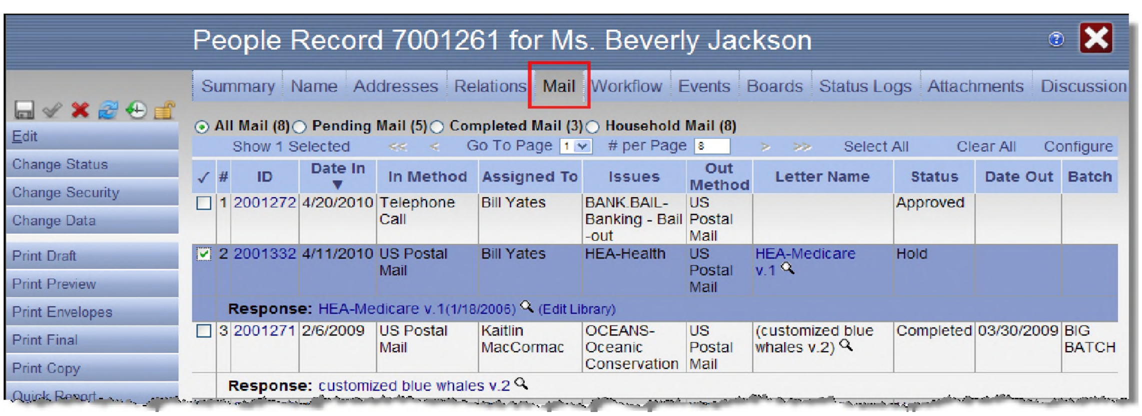
Notes

You enter the People module in a People *Quick Search* or *Advanced Search* (Explorer) page. The People submenu consists of *Search*, *Lists*, *Reports*, and *Address Checker*. In addition, *Codes*, *Sets*, *Manual Merge*, and *Auto Merge* links appear on the submenu if these features are allowed by your user security settings.

People records are central to your IQ 3 database – they can be tied to Mail, Workflow, Events, even User records. Each People record contains name and address information for one person, along with a complete history of the contacts your office has had with that person. When you edit a People record, you will see the person's information organized on panels; each panel having a tab labeled according to the type of information in the panel.



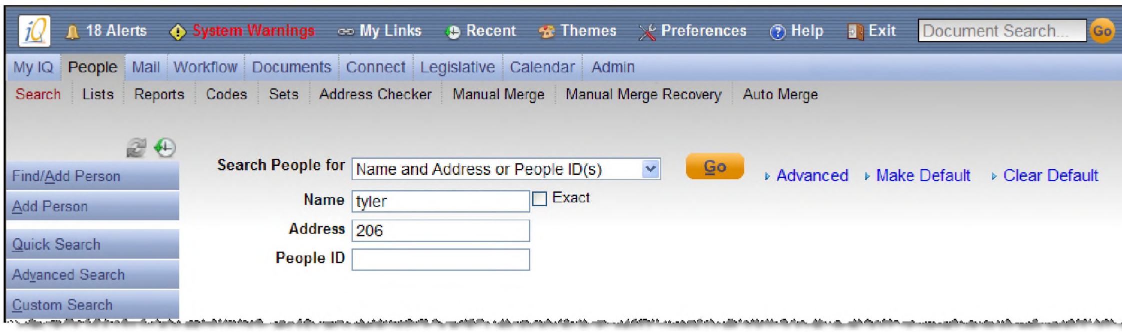
Click the tab to access information in a panel. For example, click on the **Mail** tab to see the *Mail* panel, in which all Mail records for the person are displayed and the *Actions* menu includes several options specific to working with Mail.



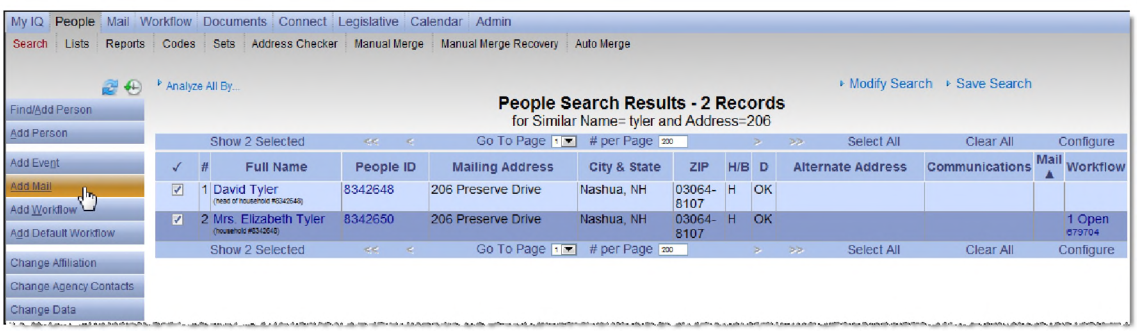
Notes

People Explorer and Search Results

In the People Explorer you can execute Quick and Advanced searches for People records, based on record information maintained in the People Module. The Quick Search provides pre-defined criteria for use in the most common People searches. The Advanced Search provides additional search criteria – typically all available fields for the Module – and can involve multiple fields, and multiple selections for a field.



Results from these searches appear in a People Search Results page providing links to access the returned records. The closest match appears in red text – hit the **Enter** key to access that record. Click a person's **name link** in the *Full Name* column to open that People record in the results. Check boxes next to people's names let you choose multiple records and take actions on them.



The ***D*** column in People Search Results displays the *Deliverability* status (evaluated by Address Checker) of the mailing address associated with the People record. Possible statuses: **OK** = confirmed as deliverable; **P** = possibly deliverable; **U** = undeliverable; and **?** = address has not been evaluated by Address Checker.

In addition, *Deliverability* is included with the criteria fields available in the People Advanced Search, and People Lists.

Notes

Actions for People Search Results

The **Actions** menu in a People *Search Results* page contains certain actions to be taken on all records in the results that you have checked. These actions, which are only active when at least one record in the Search Results is checked, include:

- **Add Event**, **Add Mail**, **Add Workflow,** and **Add Default Workflow** – these actions create a new record with all selected People records attached. For example, **Add Mail** creates one new Mail record with all checked People records attached; referred to as a Targeted Mailing (TMail).
- **Change Affiliation** – this action provides a dialog box for adding, changing, or removing specified Affiliation Codes for all checked People records.
- **Change Agency Contacts** – this action provides a dialog box for adding, or removing specified Workflow Codes and Workflow Categories in the *Workflow Agency Contact Associations* for all checked People records.
- **Change Data** – provides a dialog box with options for changing People data such as Prefix, Suffix, E-Mail Preferred, Append Comments, District, Precinct, City, County, Org1, Org2, and custom field data in all checked People records.
- **Edit** – when you need to edit or view multiple People records in the Search Results page, check the boxes next to those People and click the **Edit** action to access the records one at a time (*Next* and *Previous* actions are provided to move easily from record to record).
- **Analyze Selected** – analyze selected People records based on a wide variety of data elements, and display them in a format such as a Bar Graph or Table.
- **Print Envelopes** – enables you to print an envelope for the preferred mailing address of each selected record (requires a Default Envelope Format be defined in your Mail Record user *Preferences*).
- **Quick Report** – this action provides a dialog box with a drop-down list of available People reports you can run using the People records you have checked in the Search Results page.
- **Save as List** – use this action to create a saved People List containing all People records you have checked in the Search Results.

Notes

How to Edit One People Record from the People Explorer Page:

1. Search for the People record using *Quick* or *Advanced Search*.
2. In the *Search Results* page, click on a person's **name link** in the *Full Name* column to open that *People* record.
3. Make necessary changes to the People record.
4. Click the **Save** , **Save and Close** , or **Close** action when finished.

How to Edit Multiple People Records from the People Explorer Page:

1. Search for the People records using *Quick* or *Advanced Search*.
2. Select the People records you want to change:
   - Click on the **check box** to the left of each record; or
   - Click on the **Select All** link to include all records; or
   - Click on the **Check Mark** icon to select all records in the current page (clicking this icon again un-checks them).
3. Verify that only the records you want to change are selected, and then click on the appropriate action on the *Actions* menu.

Notes

Mail Module

The Mail module is where you manage Mail data, print or send Targeted Mailings (TMails), batch Mail records, handle incoming Internet Mail, send E-Mail responses, print letters, create Mail Lists, and run Mail Reports. To access the Mail Module, click on the **Mail** tab on the module bar.

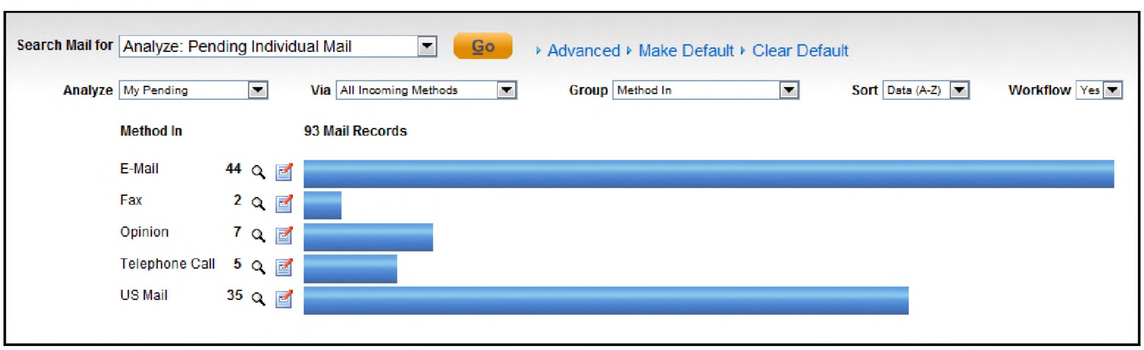
The Mail submenu consists of *Search*, *Lists*, *Reports*, *Codes*, and *Batches (Printers* and *Upload Attachments* submenu links are included if access is allowed*)*. *Search* is chosen automatically when you enter the module.

For various reasons, Mail records are not always completed at the time they are added to People records. In the Mail module, you can retrieve these 'pending' Mail records, and then access them individually, or select several and take an action on all selected records.

Mail Explorer and Search Results

The **Search** submenu link in the Mail module opens the *Mail Explorer* page displaying *Quick Search* or *Advanced Search* criteria for retrieving Mail records. A *Quick Search* finds records based on pre-defined, commonly used criteria.

Initially, the *Mail Quick Search* is set to *Search Mail for* **Analyze: Pending Individual Mail**, and automatically displays the results in a bar graph analyzing mail for the logged-in user. You can use the *Analyze*, *Via*, *Group*, *Sort*, and *Workflow* drop-down options to determine which pending records are being analyzed, and how they are grouped and sorted.

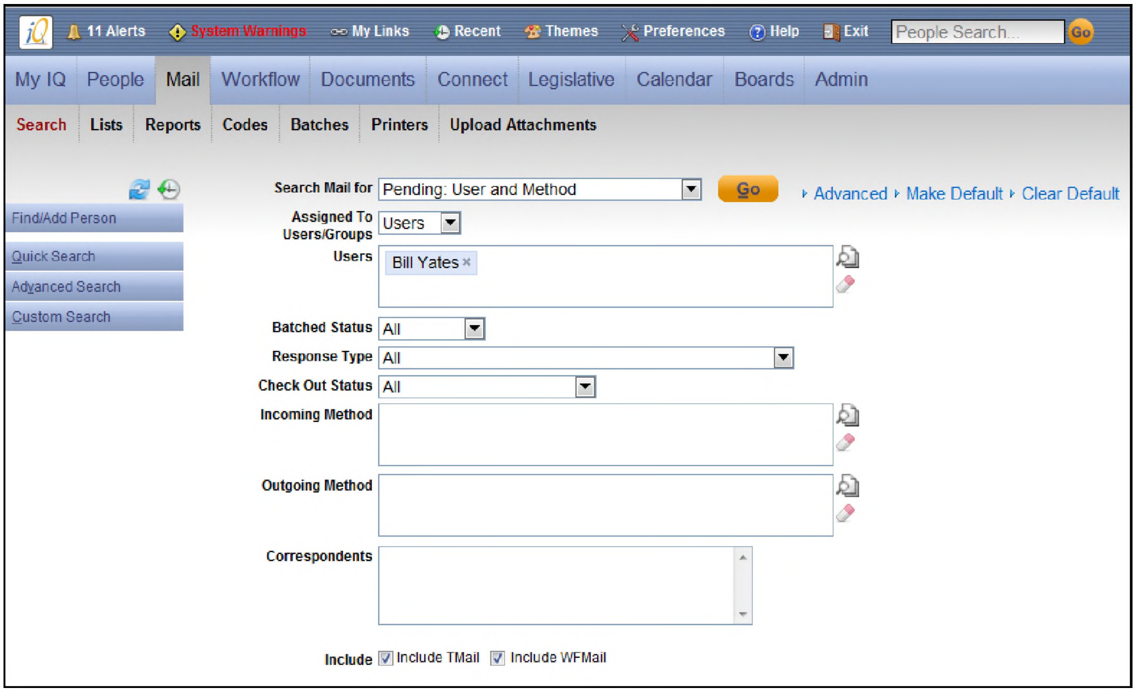


To view or access a specific group of records, click the **magnifying glass** icon that corresponds with that group.

To take action – Change Data, Change Batch, Find Campaigns, etc. – on a specific group of records, click the **paper and pencil** icon that corresponds with that group.

Notes

To use other search options available in the *Mail Quick Search* page, click in the **Search Mail for** field and select from the drop-down options list, enter values in the appropriate criteria fields, and then click the [**Go**] button.



An *Advanced Search* lets you retrieve records based on many different combinations of Mail data including Form Letter, Custom Letter Name, Batched Status, Response Type, Check Out Status, Correspondents, Affiliation Codes, Text, and more.

When searching for Mail based on Text, the *Incoming Attachment*, *Incoming Comments*, *Outgoing Letter & Attachment*, and/or *Fill Ins* of Mail records can be included; just put a check next to those you want IQ to consider during the search. Click on the icon to the right of the *For* field to view a list of text-based search tips.

In addition, an *Advanced Search* can be set up to search only within a previously saved Mail List, for records that meet the other search criteria you enter in the page.

To launch an *Advanced Search*, set all search criteria as needed and click on the [**Go**] button (some criteria field values, such as *Users*, may be pre-set for you).

You can use the **Make Default** link if you have frequently used search criteria you would like included automatically each time you click on the Mail ***Search*** submenu link. Simply set the search page exactly as you want it to appear, and then click on **Make Default**. This stores the type of search (Quick or Advanced), as well as the criteria field settings, as your default search for the Mail module.

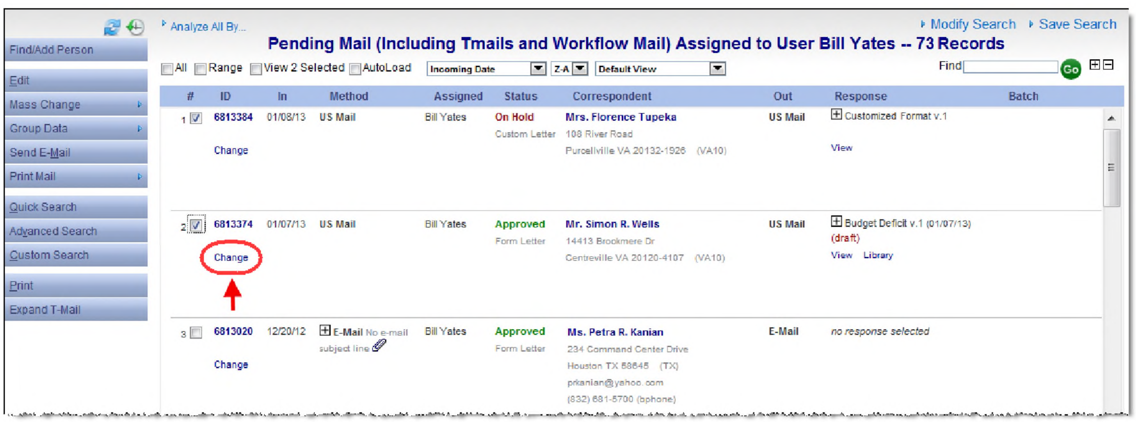
Notes

Mail records retrieved by *Quick Search* or *Advanced Search* are presented in the Mail *Search Results* page using a scrolling-style grid (shown below), which allows for faster access to large numbers of Mail records. As you scroll, using your mouse or keyboard, IQ continues to retrieve and display the Mail records into the search results.

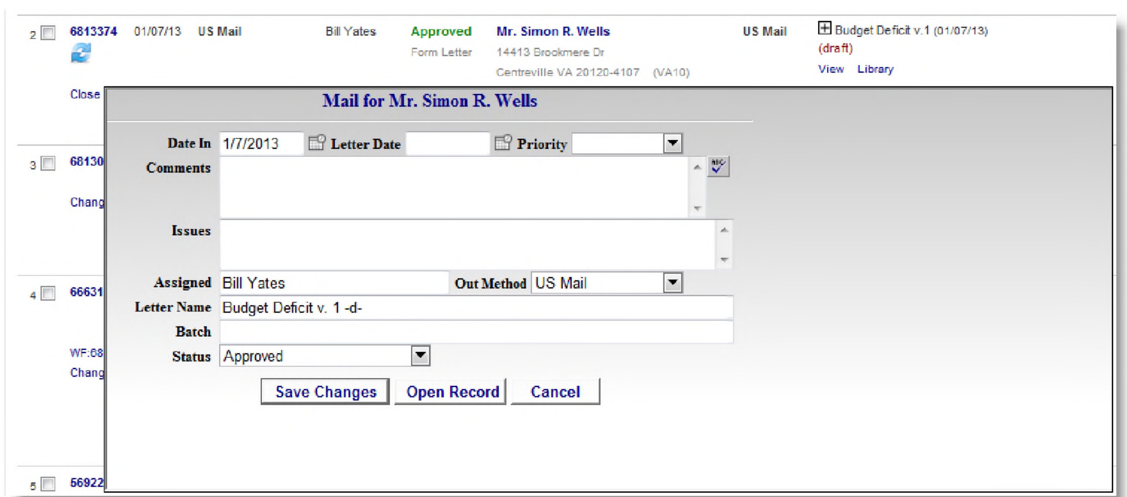
Drop-down options for changing the sort field and order, and for determining the amount of record data to display, are provided at the top of the grid.

You can filter the search results based on name, address, incoming e-mail subject or message text, and outgoing letter name using the **Find** text field located in the upper-right corner.

Several actions can be taken on all currently selected records. To select or deselect individual records, click the check boxes in the # column. Click the **All** or **Range** check box to select or deselect multiple records at once. **View # Selected** shows how many records are selected; select its check box to view only those selected records.



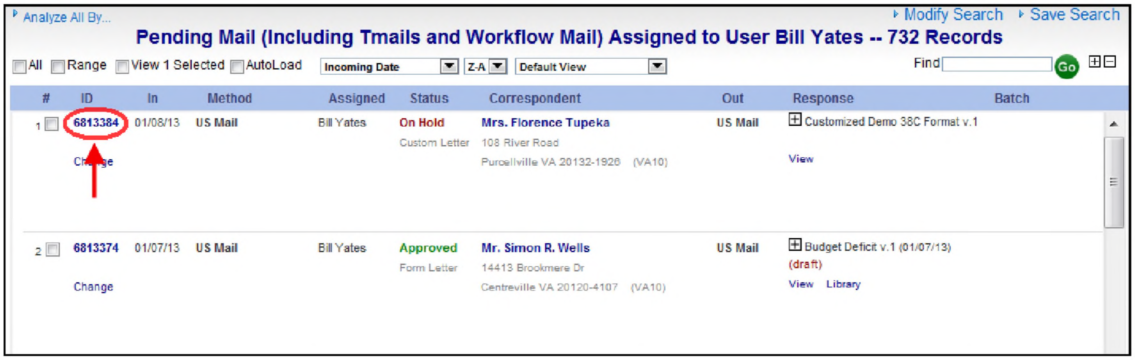
For each record in the scrolling grid, there is a *Change* link that enables you to edit certain data for that record without opening the entire Mail Record page.



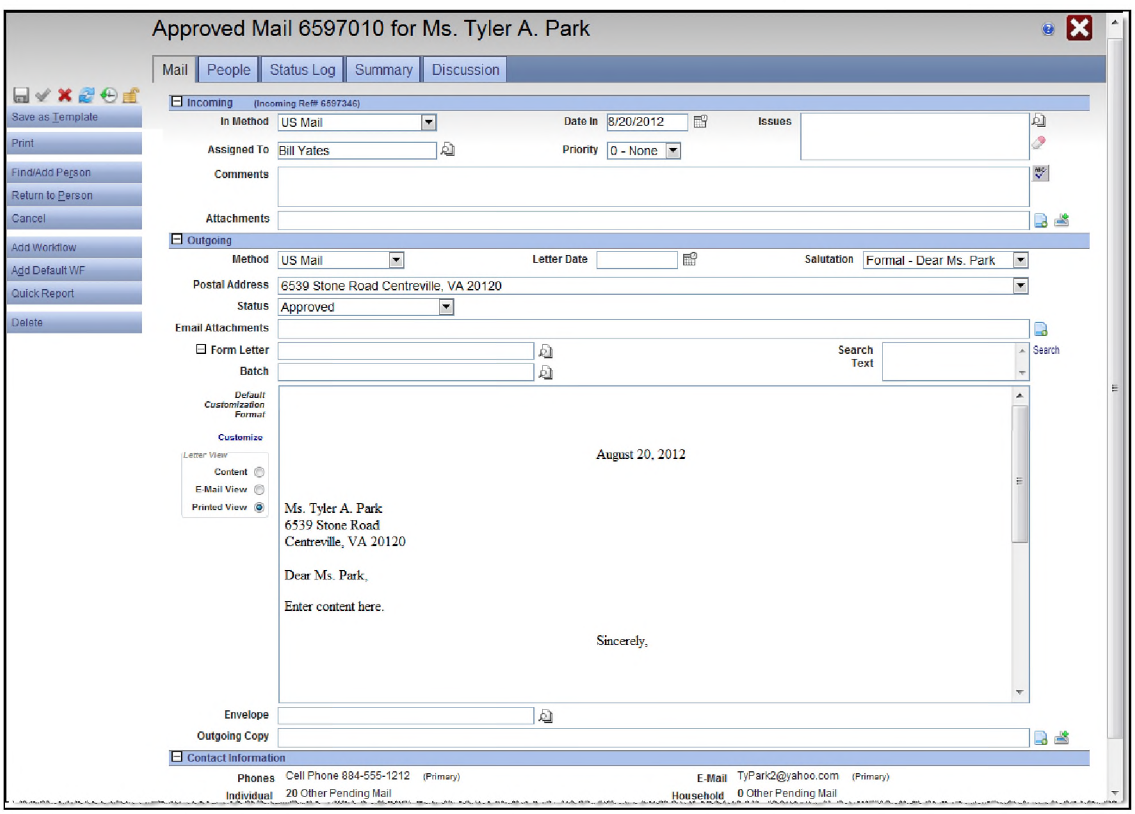
Notes

Accessing the Mail Record Page

To access the full Mail Record page for one record in the Search Results, click on the **ID** link for that Mail record to open it.



In a Mail record, you will see the mail information organized on panels; each panel having a tab labeled according to the type of information in the panel. Click the tab to access information in a panel. For example, click on the People tab to see the People panel, in which all People records linked to the Mail record are displayed.



Notes

How to Process a Mail Record from the Full Mail Record Page:

1. In Mail *Quick Search* or *Advanced Search*, set the criteria as needed and click the [**Go**] button.
2. In the Mail *Search Results* page, click the **ID** link to the Mail record (e.g. 2002290), to open it.
3. Set fields such as *Method*, *Salutation*, *Issues*, etc., as needed.
4. To assign a response for the Mail record, choose <u>one</u> of the following:
   - Click the **Customize** option link to the left of the *Preview Pane*. A new Custom Letter is created, based on your *Default Customization Format*; type the content in the built-in HTML Editor (*in place of the Preview Pane)*; or,
   - Select a *Form Letter* by clicking the search icon for the **Form Letter** field; in the *Select Form Letter* dialog, double-click on the appropriate **letter** to select it, or single-click on a **letter** to view it first, and then click **Save** to select it; or,
   - Select a **Form Letter** for the *Form Letter* field; and then click the **Customize** option link to the left of the *Preview Pane*. A new *Custom Letter* is created, based on the selected Form Letter, and its content is placed in the built-in HTML Editor for customization.
5. Click in the **Status** field, and select *Approved.*
6. Complete the Mail by taking one of the following actions:
   - Send E-Mail – to send the letter as an e-mail, click on the **Send E-Mail** action on the *Actions* menu. (Note: Outgoing *Method* must be *E-Mail.*)
   - Print Final – to print the letter, hover your pointer over the **Print Mail** action on the *Actions* menu, and select **Print Final** from the slide-out menu. (Note: **Print Final** is not available when Outgoing *Method* is *E-Mail.*)
7. Click **Save and Close** ✔, or **Close** ✖, on the *Actions* menu.

After changes are saved in the *Change* dialog box, or the full *Mail Record* page, only that changed record is refreshed in the scrolling grid to redisplay the changed record, which is marked with the green UPDATED flag.

Any record not refreshed after being accessed is marked with the **Refresh** icon. Selecting the **Refresh** icon only refreshes the surrounding records and does not cause a refresh of the entire search results.

Notes

Responding with E-Mail

In addition to printing and mailing letters, you can use e-mail to respond to incoming correspondence, whether it arrived in your office via e-mail or postal mail. To respond to Mail with an e-mail, set the (Outgoing) **Method** field to *E-Mail*.

The page will refresh to display additional fields and options:

- **From** – this field determines the address that will appear in the recipient's e-mail message to indicate from whom it was sent. The *Default From E-Mail Address* saved in *System Configuration Settings* is entered automatically; however, when a Form Letter that has an E-Mail Address specified in the form letter record is used, the address specified for the Form Letter supersedes this default. If the security settings for your IQ User ID allow it, you can select a different e-mail address in this field; otherwise, the **From** field is not editable.

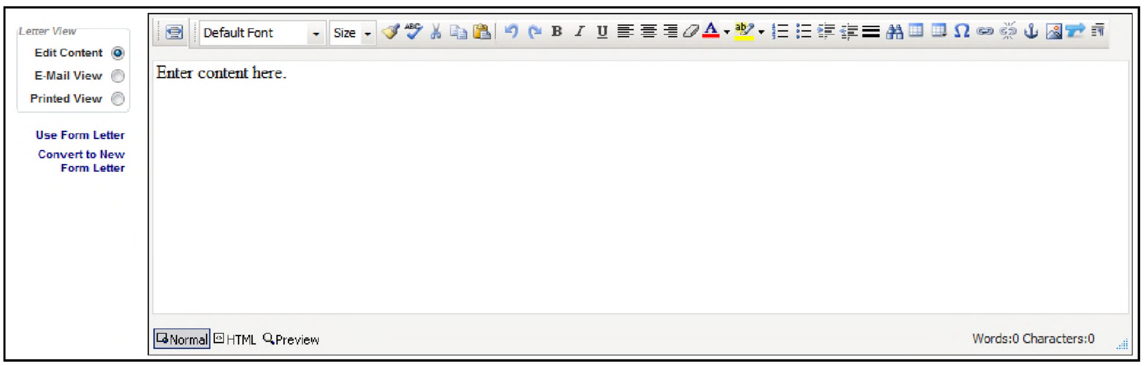
- **To** – this field is automatically populated from the correspondent's People record. If the correspondent's People record has more than one valid e-mail address, you can click in the **To** field and select a different e-mail address from the drop-down list.

  If this field is blank, the **Send E-Mail** action is inactive. Click the **Return to Person** action to enter an e-mail address in the correspondent's People record.

- **Subject** – enter a subject; use the subject tied to a selected Form Letter; or leave the field blank to use the default in *System Configuration Settings*. The Subject entered for an outbound e-mail can include Merge Codes.

Notes

- **CC** and **BCC** – multiple e-mail addresses, each separated by a comma, can be entered in these fields.
- **Auto CC** – if the People record to which a Mail record is attached has active e-mail addresses in addition to the one selected in the *To* field of the Mail record, you can select the *Auto CC* check box to send a CC to each of those additional e-mail addresses automatically.
- **Customize** – Lets you customize your letter using an embedded HTML Editor. When you click on this option, the screen refreshes to display the editor in Normal mode (shown below), where you can create the body of your custom letter. In addition, you can click on **HTML** (at the bottom) to view/enter text as HTML.



To send the e-mail, click the **Send E-Mail** action on the *Actions* menu. Note: The *Send E-Mail* action is not available in the Mail record if the *Form Letter* field is blank, the *To* field is blank, or the *Status* of the Mail record is not set to *Approved*.

Notes

How to Send an E-Mail Response:

1. Select or add a *People* record using **Find/Add Person**.
2. Click **Add Mail** on the *Actions* menu.
3. Set fields in the *Incoming* section as needed.
4. In the *Outgoing* section, click in the **Method** field and select *E-Mail (or Internet Mail*).
5. In the **To** field, keep the default e-mail address or click in the field and select from a list of all e-mail addresses in the correspondent's People record.
6. Set **Subject**, **CC**, **BCC**, **From**, and **Salutation** fields, if appropriate.
7. Select a form letter in the **Form Letter** field; or, click the **Customize** option link to create a custom letter.
8. Click the **E-Mail View** option button to display the E-Mail Format combined with the Content – this is how it will appear when sent.
9. Click the **Send E-Mail** action. Note: In a *Targeted Mail* Record, click on the **Send All Emails** action to send a separate e-mail to each person attached in the People panel of the Mail record.

To include an attachment when you send an E-Mail, click the search icon to the right of the **Email Attachments** field.

In the *Attach File to Outbound E-Mail* dialog, select an Attachment Type – *Local Files* to enter a filename or browse to select a file from a drive; or *Documents* to select a Document from the IQ Document Library.

When you click the **Send E-Mail** action, all files displayed in the (Outgoing) *Email Attachments* field will be sent with the E-Mail message.

If the (Outgoing) Method is E-Mail, the **Print E-Mail** action on the *Actions* menu is available for printing a hard copy of the e-mail. Hover your pointer over the **Print Mail** action, and then select the **Print E-Mail** action from the slide-out menu.

Actions for Mail Search Results

Notes

The **Actions** menu in a Mail *Search Results* page contains certain actions to be taken on all records in the results that are selected (checked). These actions, which are only active (bolded) when at least one record in the Search Results is selected, include:

- **Edit** – when you need to edit or view multiple Mail records in the Search Results page, check the boxes next to those Mail records and click the **Edit** action to access the records one at a time (*Next* and *Previous* actions are provided to move easily from record to record).

- **Mass Change** – hover over it to display a slide-out menu with the following actions:

  Change Data – provides a dialog box with options for changing Mail data in all checked Mail records (see section below).

  Change Status – this action provides a dialog box for changing the Status field in checked Mail records. Several options are available in the *Change Status* dialog page, including changing the status to *'Complete as Duplicate' if Not the Earliest Duplicate*, and *'Complete as Duplicate' if Not the Latest Duplicate*.

  Change Security – this action is for applying record level security to the selected records, and is displayed only if allowed by your User Security settings.

  Delete – this action is for deleting all of the selected records, and is displayed only if allowed by your User Security settings. A dialog box is provided for you to confirm or cancel deletion.

- **Group Data** – hover over this to display a slide-out menu with the following actions:

  Find E-Mail Campaigns – this action is for identifying and mass processing mail records that have similar incoming e-mail message text. Similar means that some percentage of the case-insensitive sentences are shared. IQ can display response suggestions if the *Campaign Correlation Engine* is enabled.

  Analyze Selected – analyze selected Mail records based on a wide variety of data elements, and display them in a format such as a Bar Graph or Table.

Notes

Save as List – use this action to create a saved Mail List containing all Mail records you have checked in the Search Results. A saved Mail List can be converted to a People or Workflow List.

Quick Report – this action provides a dialog box with a drop-down list of available Mail reports you can run using the Mail records you have checked in the Search Results page.

Download Attachments – downloads the files and Document Library items attached to the selected Mail records and copies them to the c:\iq\download folder on your workstation (only files to which you have at least Read access for Record Security will be downloaded). Printing occurs from Windows Explorer to your workstation's default printer.

- **Send E-Mail** – e-mails are generated and sent for checked Mail records that have the *(Outgoing) Method* set to **E-Mail**. A dialog box lets you choose to send the e-mails in the *Foreground Now*, in the *Background Now*, or in the *Background Later*.
- **Print Mail** – hover over it to display a slide-out menu with the **Print Draft**, **Print Preview**, **Print Envelopes**, **Print Labels**, **Print Final**, and **Print Copy** actions that can be taken on selected Mail records.

How to Take an Action on Multiple Records in Mail Search Results:

1. In Mail *Quick Search* or *Advanced Search*, set the criteria as needed and click the [**Go**] button.
2. In the Mail *Search Results* page, select the check box next to every Mail record you want the action to affect. Use the *All*, *Range*, *View # Selected* check box options, as needed.
3. Click on the desired action on the *Actions* menu to the left.
4. A dialog box may open that offers options specific to the action you chose.

Notes

Printing Letters from Mail Explorer

All print actions – ***Print Draft***, ***Print Preview***, ***Print Envelopes***, ***Print Labels***, ***Print Final***, and ***Print Copy*** appear on the Actions menu for the Mail Search Results page. This enables you to print Letters, Envelopes, and Labels directly from the Search Results page, without placing the Mail records in a Batch.

A T-Mail record is initially displayed as one row in the Mail *Search Results* page, and can be selected for printing and taking other actions. It can also be expanded using the ***Expand T-Mail*** action to display each person, allowing you to print the letter for specific people in the T-Mail instead of all people included in the T-Mail.

How to Print Letters From a Mail Search Results Page:

1. Click the **Mail** tab on the *Module Bar*.
2. Set your search criteria and click [**Go**] to launch your Mail search.
3. Click on the **check boxes** next to the Mail records you want to print. Use the *Select All*, *Clear All*, *Show # Selected*, and *Check Mark* ✓ links as needed.
4. Hover your pointer over the **Print Mail** action, and click **Print Final** on the slide-out menu.
5. Click the [**OK**] button to clear selected Mail records, or click [**Cancel**] to keep Mail records selected for further processing.

Changing Data in Mail Records (mass change)

Changing or removing the *Form Letter* assigned in one, or many, Mail records can be done by selecting the Mail records to be updated, and then clicking the ***Change Data*** action that appears on the **Mass Change** slide-out menu. This action launches the *Change Data* dialog page that enables you to mass-update several fields at once. These fields are:

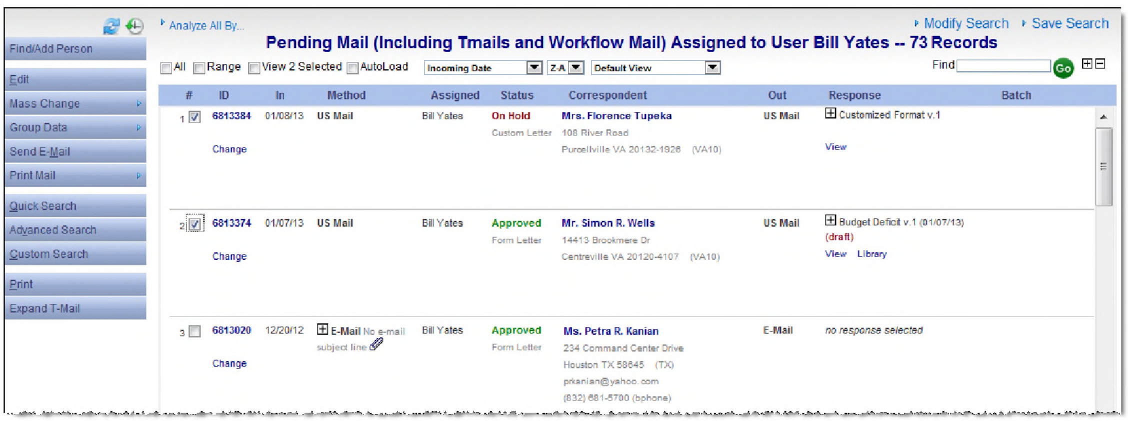
Incoming Method	**Letter Date**
Date In	**Outgoing Method**
Priority	**E-Mail Subject**
Comments	**E-Mail CC**
Issues	**E-Mail BCC**
Assigned To	**E-Mail From Address**
Salutation	**Custom Letter E-Format**
Form Letter	**Custom Fields**
Envelope	**Batch Change**

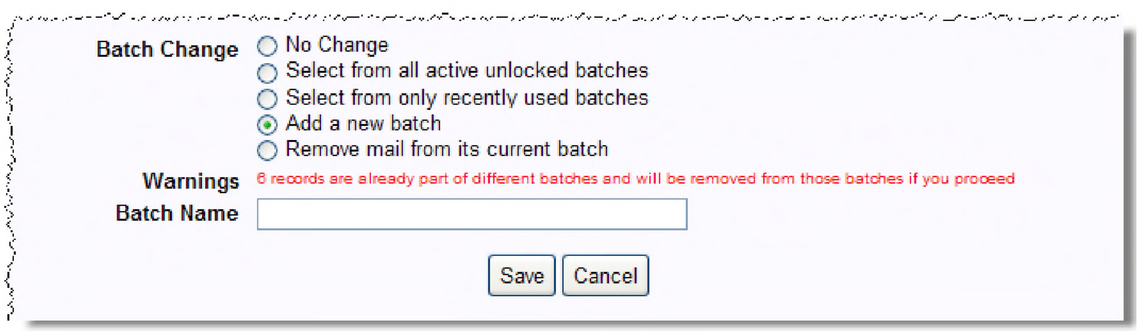
Notes

Entering Mail into Batches from Mail Explorer Page

A batch consists of Mail records that are grouped together and given a batch name because they have something in common. Using the **Change Data** action, you can add a single Mail record to a batch, select several Mail records and put those in a Batch, switch Mail records from one Batch to another, or remove Mail from a batch, right from the Mail Explorer page.

For selected Mail records previously added to a Batch, you are given a message letting you know how many records already are part of different batches and will be removed from those batches if you proceed.





Notes

How to Update Batch Assignments for Mail Records in the Search Results Page:

1. Click the **Mail** tab on the Module bar and search for Mail using *Quick* or *Advance Search*.
2. In the Search Results page, select the check boxes next to all Mail records you want to change.
3. Hover your pointer over the **Mass Change** action, and click **Change Data** on the slide-out menu; the *Change Data* dialog opens.
4. In the **Batch Change** area (near the bottom), do one of the following:
   a. Click on **Select from all active unlocked batches**; then select a batch in the ***Existing Batches*** field list.
   b. Click on **Select from only recently used batches** (appears only if you have used a batch in the current IQ session); then select a batch in the ***Recent Batches*** field list.
   c. Click on **Add a new batch**; then enter a batch name in the ***Batch Name*** field.
   d. Select the **Remove Mail from its current batch** option button.
5. Click the **[Save]** button.
6. Click the [**OK**] button to clear the selected Mail records, or click [**Cancel**] to keep the Mail records selected for further processing.

Batches

The submenu for the Mail module includes *Batches*, which takes you to the Batches Explorer page. From there you can use the Quick or Advanced Search to retrieve the list of batches you want to work with. Quick Search will retrieve active batches only; to search for Active and Archived batches, use Advanced Search.

In the *Batches Explorer* page, set your criteria and click [**Go**] to launch your search. In the *Batches* Search Results page, with at least one batch selected, all *Print* actions and the *Send E-Mail* action are available so entire batches can be printed or e-mailed from that page. To work with Mail contained in one specific batch, click on the *Batch Name* **link** to list those Mail records in the *Full Batch* page.

Notes

Filtering a Batch

Once you have your list of Batches in the Search Results page, click the ***Batch Name*** link to list all Mail records in the batch. You can then click the ***Filter Batch*** Action to display only certain Mail in the batch. This is helpful because Batches can contain both U.S. Mail responses and E-Mail responses, as well as Targeted Mail records.

Print Mail actions, and several other actions, can be taken on selected Mail records in the *Filtered Batch* and *Full Batch* pages. Click ***Clear Filter*** to re-display the *Full Batch* page, showing all Mail in the batch.

Printing Batches

You can select all Mail records having an (Outgoing) Method of *US Mail* and print them; or choose only a portion of them to print. The *Print Draft*, *Print Preview*, *Print Envelopes*, *Print Labels*, *Print Final*, and *Print Copy* actions are available once you have selected at least one Mail record in the *Full Batch* or *Filtered Batch* page.

Mail having an (Outgoing) Method set to *E-Mail* must be sent separately by clicking the **Send E-Mail** action. To isolate E-Mails, *Filter* the batch or click the **Out Method** column heading in the *Full* or *Filtered Batch* page to re-sort Mail records based on Out Method.

How to Print Mail Records in a Batch:

1. Hover your mouse pointer over the **Mail** module tab, and then click **Batches** on the submenu that appears.
2. Search for the batch you want to work with.
3. In the *Search Results* page (list of Active Batches) click the **Batch Name** link in the *Batch Name* column.
4. Click the **check box** next to any Mail record that needs printing (use the *All*, *Range*, or *View # Selected* check boxes, as needed).
5. Hover your pointer over the **Print Mail** action, and click **Print Final** on the slide-out menu.
6. Click the [**OK**] button to clear the selected Mail records, or click [**Cancel**] to keep the records selected.

The **Download Attachments** action is available, on the **Group Data** slide-out menu in the *Full Batch* and *Filtered Batch* pages, for downloading files and Document Library items attached to selected Mail records. Only files to which you have at least Read access Record Security will be downloaded. Printing the downloaded files occurs from Windows Explorer to your workstation's default printer.

Notes

Changing Mail Data in Batches

In the *Batches* Search Results page, you can change data for all Mail records in multiple Batches by selecting the batches you want to change and clicking the **Change Mail Data** action (multiple Batches may be changed, so be certain that only batches you want to mass update are selected when you use this action).

In addition, while in the *Full Batch* or *Filtered Batch* page, you can click on the **Change Data** action (on the menu to the left) to change data for specific Mail records you have selected in the batch you are accessing.

How to Change Mail Data in Batches:

1. On the *Batches* Search Results page, click the **check box** next to all Batches in which you want specific Mail data to change.
2. Click the **Change Mail Data** action on the *Actions* menu.
3. In the *Change Data* dialog, enter the changes and then click the [**Save**] button.
4. Click the [**OK**] button to clear the selected Batch record, or click [**Cancel**] to keep the record selected.

Merging Batches

To merge batches, use the *Change Mail Data* action in the *Batches* Search Results page. For example, to merge all Mail in batch *ABC* into another existing batch, select batch ***ABC***, click the **Change Mail Data** action, and select a ***Batch Change*** option button that lets you select or name an existing batch in which to merge the Mail. Another example is to select multiple batches in the *Batches* Search Results, click on **Change Mail Data**, choose the ***Batch Change*** option "*Add a new batch,*" and enter a new batch name so all Mail in the selected batches moves to the new batch.

Closing Batches

The **Close Mail** action on the *Batches* Search Results page changes the **Status** to ***Completed*** for all Mail records in all Batches you currently have selected. In addition, while in the *Full Batch* page you can click on the **Close Batch** action in the *Actions and Summary* section to close the batch you are accessing. User security, however, may restrict your ability to close certain Mail using either method.

Notes

How to Close Batches:

1. On the *Batches* Search Results page, click the **check box** next to all batches to be closed.
2. Click the **Close Mail** action on the *Actions* menu.
3. Click [**OK**] to confirm the action.
4. Click [**OK**] again in the next window to refresh the page.

Archiving Batches

Archiving removes batches from the Active Batches page, and lets you reuse batch names. The **Archive** action lets you archive batches; the **Activate** action lets you return archived batches to an Active status.

How to Archive Batches:

1. On the *Active Batches* or *All Batches* Search Results page, click the **check box** next to all batches to be archived.
2. Click **Archive** on the *Actions* menu to archive all selected batches.
3. Click [**OK**] to confirm the action.
4. Click [**OK**] again in the next window to refresh the page.

Deleting Batches

Deleted batches do not remain on your system. The Mail records remain, though.

How to Delete Batches:

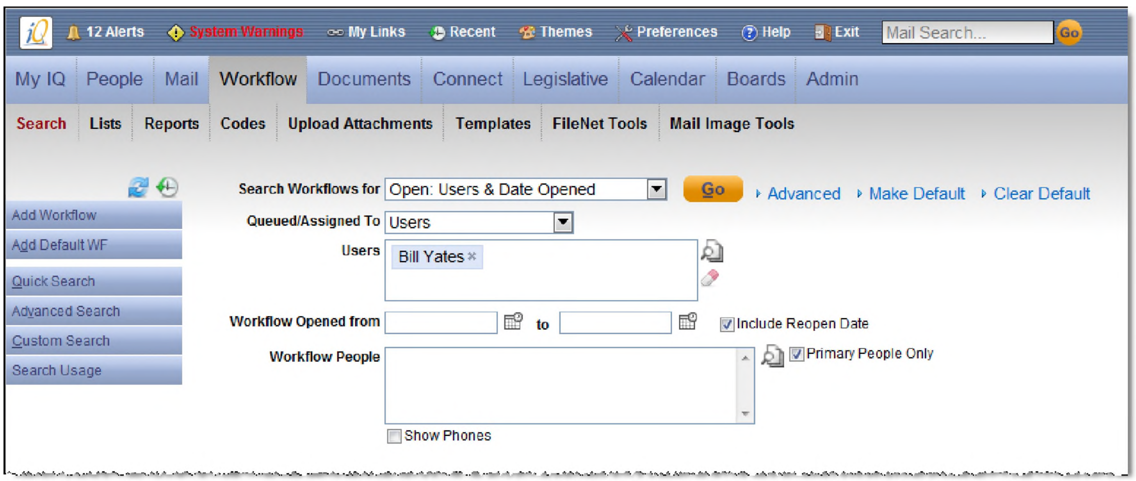
1. On the *Batches* Search Results page, click the **check box** next to all batches to be deleted.
2. Click **Delete** on the *Actions* menu to delete all selected batches.
3. Click [**OK**] to confirm the action.
4. Click [**OK**] again in the next window to refresh the page.

On the Full Batch page where you list all Mail records in a batch, the *Archive Batch (or Activate Batch)*, *Close Batch*, *Delete Batch*, *Lock Batch* (or *Unlock Batch*), *Change Owner*, and *Change Name/Desc* actions are available in the *Actions and Summary* section at the top of the page. These actions affect only the batch you are currently accessing, and are active when filtering the Batch, as well.

Workflow Module

Workflow can be used to track virtually any activity such as casework, flag requests, tour requests, and Event or Document approval processes. Available features include the ability to create notes, send letters and e-mail, set reminders and due dates, search for opened and/or closed workflows, and run Workflow Reports.

People records can be attached to Workflow records, and letters are sent to those People through Mail records that are linked to both the Workflow and People record.



Notes

Notes

Documents Module

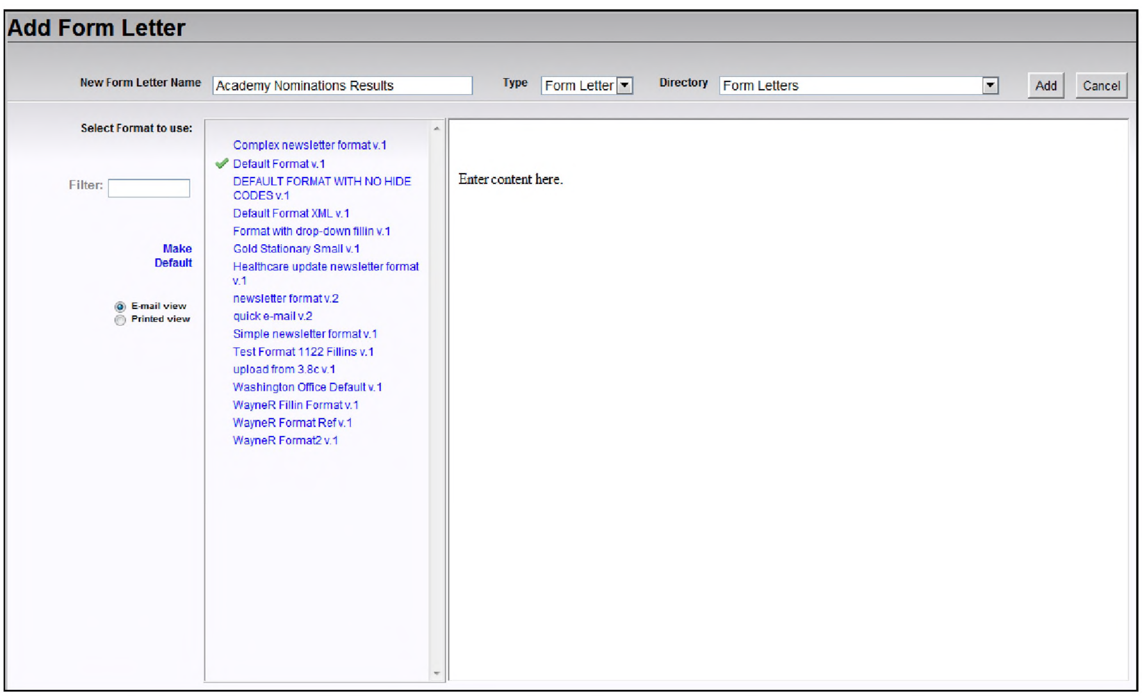
The *Document Library* lets you create, access, approve, organize, and archive Form Letters, Formats, and Press Releases.

All other types of office documents can be stored in the IQ Document Library, as well. For example, an Excel Spreadsheet saved on a user's local drive can be uploaded into the database in a particular folder, then accessed by all, or certain, IQ users.

Documents maintained through the Document Library are stored in the Oracle database, and are 'checked out' of the library, opened in MS Word (or other application) on your desktop for editing, then 'checked in' again. This allows for better tracking and version control. Form Letter content is entered in the HTML Editor built into the record page.

Creating Form Letters

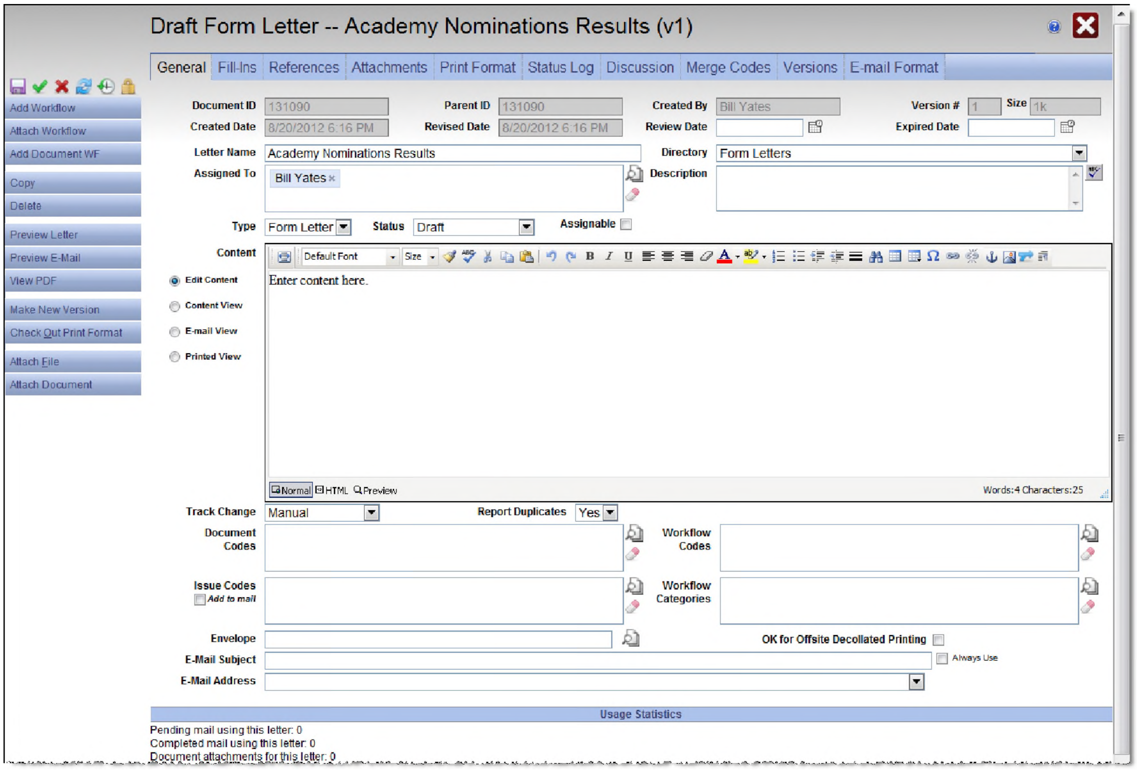
To add a new Form Letter to the Document Library, click the **Add Form Letter** action on the *My IQ* Actions menu, or the *Documents Explorer* Actions menu. In the *Add Form Letter* page, enter the **New Form Letter Name** and select a **Directory** (if needed). In the **Select Format to Use:** list, click on the format to use in creating the new Form Letter. A green check mark indicates the currently selected format; you can make that format your default by clicking the **Make Default** option link.



The **E-mail view** and **Printed view** option buttons are available to switch between viewing the format as an E-mail Format or Print Format.

Notes

Once you click the [**Add**] button, the *Document* record page will open in place of the *Add Form Letter* page, and the name of your new Form Letter will appear at the top.



With the *Edit Content* option button selected, place your cursor in the HTML Editor pane, remove the **"Enter content here"** text, and then type the body of the Form Letter. This is the *Content* of the letter, and will be combined with the *E-mail Format* or *Print Format* when the Form Letter is used in Mail records.

To view the *Content* and *E-mail Format* combined, as it will appear when sent as an e-mail, click the **E-mail View** option button. To view the *Content* and *Print Format* combined, as it will appear when sent as a printed letter; click the **Print View** option button.

To select a different *E-mail Format* for the Form Letter, click the **E-mail Format** tab, select the **Switch E-mail Format** option button, and then click in the **E-mail Format Source** field and select an e-mail format from the drop-down list.

To create a custom *E-mail Format*, click the **E-mail Format** tab, select the **Switch E-mail Format** option button, and then click in the **E-mail Format Source** field and select ***Custom E-mail Format*** from the drop-down list. Make changes in the HTML editor that appears, and save the record – the custom format will affect only the Form Letter you are currently editing, and any copied from it later.

Notes

To select a different *Print Format* for the Form Letter, click the **Print Format** tab, click in the **Print Format Source** field, and then select a print format from the list.

How to Create a Form Letter:

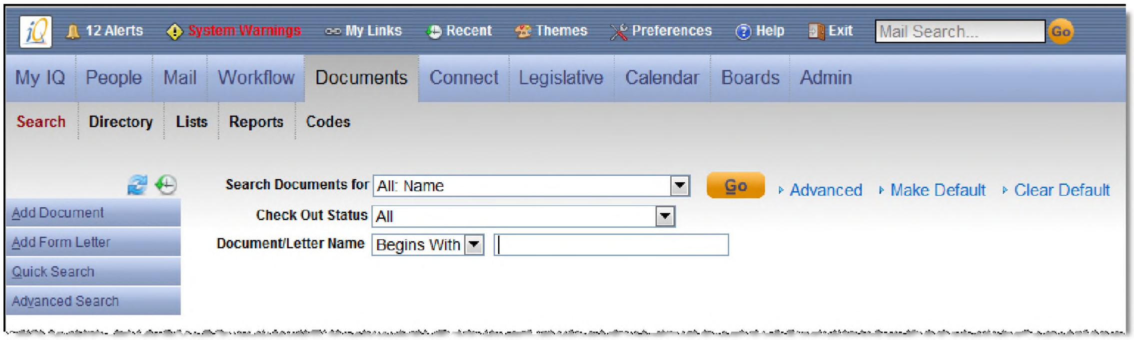
1. Click the **My IQ** tab or the **Documents** tab on the *Module Bar*.
2. Click **Add Form Letter** on the *Actions* menu.
3. Type the name of the new form letter in the **New Form Letter Name** field.
4. Use the default format, or select a different format from the **Select Format to Use:** list. The green check mark indicates the current selection. (Note: This Format initially provides the *Print Format* and *E-Mail Format* for the new form letter, but either can be changed once the form letter record is created.)
5. Use the default directory, or click in the **Directory** field to select one.
6. Click the [**Add**] button.
7. Type information about the Form Letter in the **Description** field.
8. Click the search icon next to the appropriate code field (Document Codes, Issue Codes, Workflow Codes, or Workflow Categories) and select code(s). Click the [**Save**] button when finished.
9. With the **Edit Content** option selected, place your cursor in the *Editor* pane, remove the *'**Enter content here"*** text, and then type the body of the letter.
10. Click in the **Status** field and select a status.
11. Click **Close** on the *Actions* menu.

Form Letters with a status of *Approved* will be available to assign in Mail records. To make a letter available even though it is not Approved, check the **Assignable** box in the *Document* record page.

Searching for Form Letters

In the *Documents* Module, the *Documents Explorer* page enables you to search for form letters using a *Quick Search* or *Advanced Search*. You can find form letters (and other documents) based on criteria such as Name, Codes applied to a Document record, the Users to whom a document is assigned, the Status, text contained in the document, etc.

Notes



A **Quick Search** lets you select from a list of specific fields and field combinations on which to base your search. Click in the **Search Documents for** field to display the list of available criteria.

When searching for Documents, remember that some searches display fields with pre-set values. For example, when the search includes the *Assigned To Users/Groups* field, the default is *Users* and the logged-in user's name is already entered in the field by IQ. If you don't get the results you expect, check this and other fields like *Status* and *Type* to make sure they match what you are looking for.

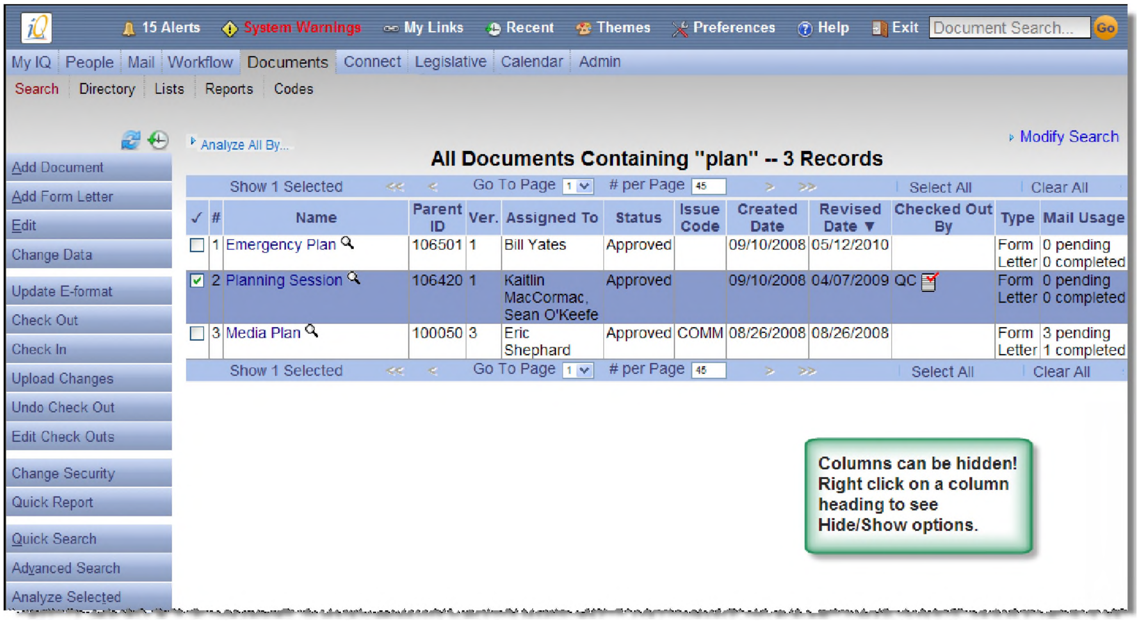
How to Search for a Form Letter by Letter Name:

1. Click on the **Documents** module tab.
2. The *Documents Explorer* page opens in either *Quick* or *Advanced* Search.
3. If accessing *Quick Search*, click into the **Search Documents for** field and choose **All: Name**. If accessing *Advanced Search*, skip to Step 4.
4. Do one of the following:
   - Type the letter name, or the <u>beginning</u> of the letter name, in the **Document/Letter Name** field (already set to *Begins With*).
   - Click the drop down next to **Begins With** and change it to **Contains**, then type a portion of the letter name in the *Document/Letter Name* field (the % wildcard can be used).
5. Click the [**Go**] button.

Edit Letter

To edit Document record information, change the content of the letter, or select a different Print Format or E-mail Format; click the **Name** link in the Documents *Search Results* page. You can also edit multiple records by checking the box next to the letters to select them, and then clicking the **Edit** action. In the first Document record page, click the **Next** action to save that letter, and edit the next selected record; click **Previous** to go back to a previous record.

Notes



Other actions that can be taken on all records selected in the Documents Search Results, if security settings allow, include **Delete**, **Assign Codes**, **Change Status**, and **Quick Report**. To display only the records that have been checked/selected, click the **Show # Selected** link above (or below) the check boxes. Click **Show All** to display the complete results again.

View Letter

Click the 'magnifying glass' icon next to the *(letter) Name* link in the *Documents Search Results* page to view the letter in a separate window. In addition, your user Preferences can be set to show a Collapsed or Expanded view of letters embedded in the Documents Search Results page.

When editing a *Form Letter* Document record, you can view and print a preview of the Form Letter by clicking the ***Preview Letter*** action; or e-mail a preview of the Form Letter by clicking on the ***Preview E-mail*** action.

View Attachments

In the Search Results page, a paper clip icon appears if the document contains one or more attachments. Clicking the icon will open the attachment if there is only one. For documents with multiple attachments, clicking the paper clip icon will display the *Attachments* panel of the Document record.

Notes

How to Search for Any Form Letter by Issue Code:

1. Hover your mouse pointer over the **Documents** module tab, and then click **Search** on the submenu that appears.
2. Click the **Advanced** link (next to **Go**), if the *Advanced Search* is not displayed already.
3. Click the search icon next to the *Issue Code* field and select a Code; then click the [**Add**] button (repeat if searching multiple codes).
4. Click the [**Save**] button when finished.
5. Click the [**Go**] button.

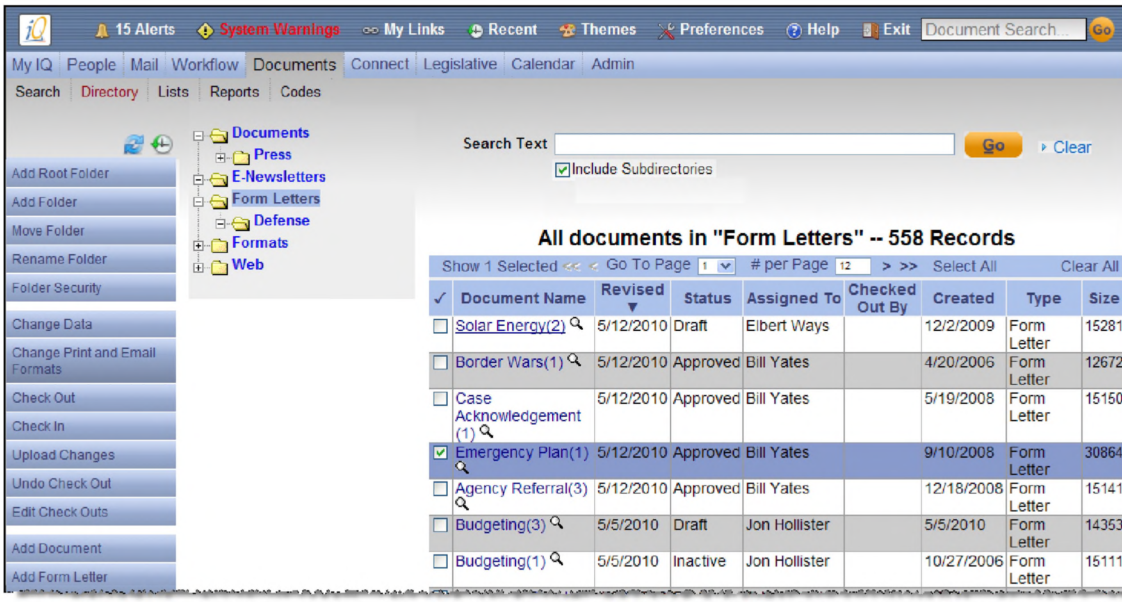
Note: The Quick Search option used for finding letters based on Issue Code is *Form Letters: Issue Code and Status*.

How to Search for a Letter Based on Text:

1. Hover your mouse pointer over the **Documents** module tab, and then click **Search** on the submenu that appears.
2. In *Quick Search*, click in the **Search Documents for** field and choose **Text**.
3. Click in the **Status** field and choose a status, or accept the default.
4. Click in the **Type** field and choose a document type, if needed.
5. In the **Search Text** field, type the text for which to search.
6. Click the [**Go**] button.

Notes

Click the ***Directory*** submenu link to access Form Letters and other documents by folder assignment. Root Folders expand to display Subfolders; click on a Subfolder to list its contents. Click the 'magnifying glass' icon next to the *Document Name* link in the *Documents Directory* page to view the letter. Click the ***Document Name*** link to edit the Document Record, and check out the letter for editing.



You can search for documents by name or content using the *Search Text* field displayed above the list of Document records. IQ will search the current folder and its subfolders. The results will include any Form Letter, Format, or Document with a name that includes the searched word, or words; along with those that include the searched word or words in their text.

How to Search the Document Directory:

1. Hover your mouse pointer over the **Documents** module tab, and then click **Directory** on the submenu that appears.
2. 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.
4. If you want to limit the search to the current folder, uncheck the **Include Subdirectories** box, and then click the [**Go**] button.
5. If you want to repeat your current search in a different folder, leave the text in the **Search Text** field, and click on the other folder or subfolder. The search will run automatically on that folder.
6. Click the [**Clear**] button to clear the search results and return to the folder or subfolder listing.

Notes

Making a New Version of a Form Letter

When the text of a standard Form Letter must be changed, you can make a new version of that letter while retaining the original letter and all references to it in Mail records. Often, you will want to continue using the same Form Letter name when responding to a specific issue even though the content of the letter must change; however, if you change the name of the new version it will still be identified as a later version of the original letter.

Setting the Status of the new version to *Approved*, automatically changes the previous version(s) to *Inactive*. You can make as many versions of a letter as necessary to keep the letter current.

How to Make a New Version of a Form Letter:

1. Search for the existing Form Letter.
2. Click the ***Name*** **link** for the Form Letter to open the Document record.
3. In the Form Letter record page, click the **Make New Version** action.
4. IQ will create a new Document record for the new version of the letter, and automatically open its Print Format in MS Word for editing.
5. Edit the Print Format, if needed, then save it and exit Word.
6. Back in the Document record, set fields as needed, and click the **Check In Letter** action. Changing the **Status** will also check in the letter.

Once a Form Letter has been assigned in at least one Mail record, and the Status of that Mail record is *Completed*, you will not be able to edit the content. Use the **Make New Version** action in the Document record to update the letter, and then assign that new version in pending Mail.

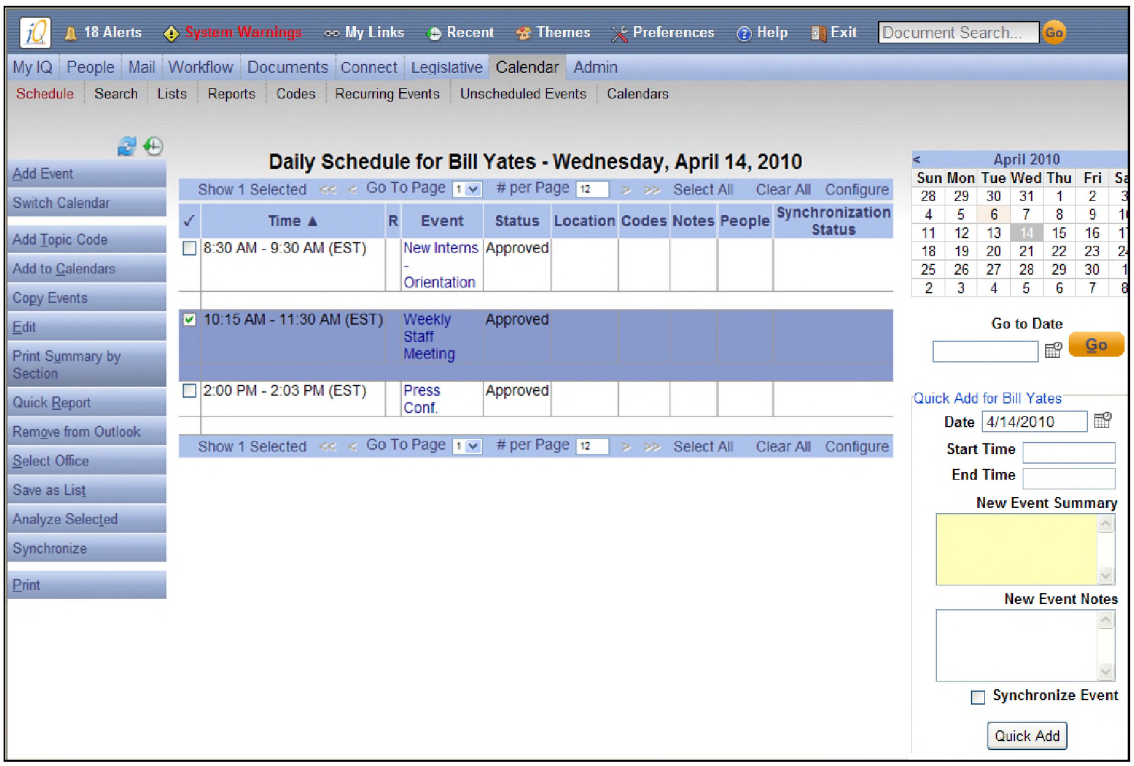
Notes

Calendar Module

Each IQ 3 user can have a Calendar, and additional Calendars can be created that are not tied to specific User IDs. Clicking the **Calendar** tab on the *Module Bar* brings you to the *Schedule* page, showing the Events on your default Calendar.

Your default Calendar is determined by a setting in your user *Preferences* (link at the top of the page). The **Switch Calendar** action enables you to switch to Events on a different Calendar, if you have access rights to other Calendars.

You can add a new Event by clicking on the **Add Event** action in the My IQ page or in the Calendar module's *Schedule*, *Search, or Unscheduled Events* submodule.



To print a schedule, click ***Reports*** on the submenu of the Calendar Module, then click the *name link* of a Calendar report; for example, *3by7 Schedule Card* or *Monthly Schedule*. A report criteria window will open where you can set your criteria and then click the [**Run Report**] button. The Calendar report will open in a browser window for printing.

Unscheduled Events – those events for which a date has not been set – do not appear on the *Daily Schedule* page. To access Unscheduled Events, click the **Unscheduled Events** link on the submenu of the Calendar module. All Unscheduled Events for your default calendar will be displayed in a search results page where you can open an Event record by clicking on its link in the **Event** column.

Notes

Admin Module

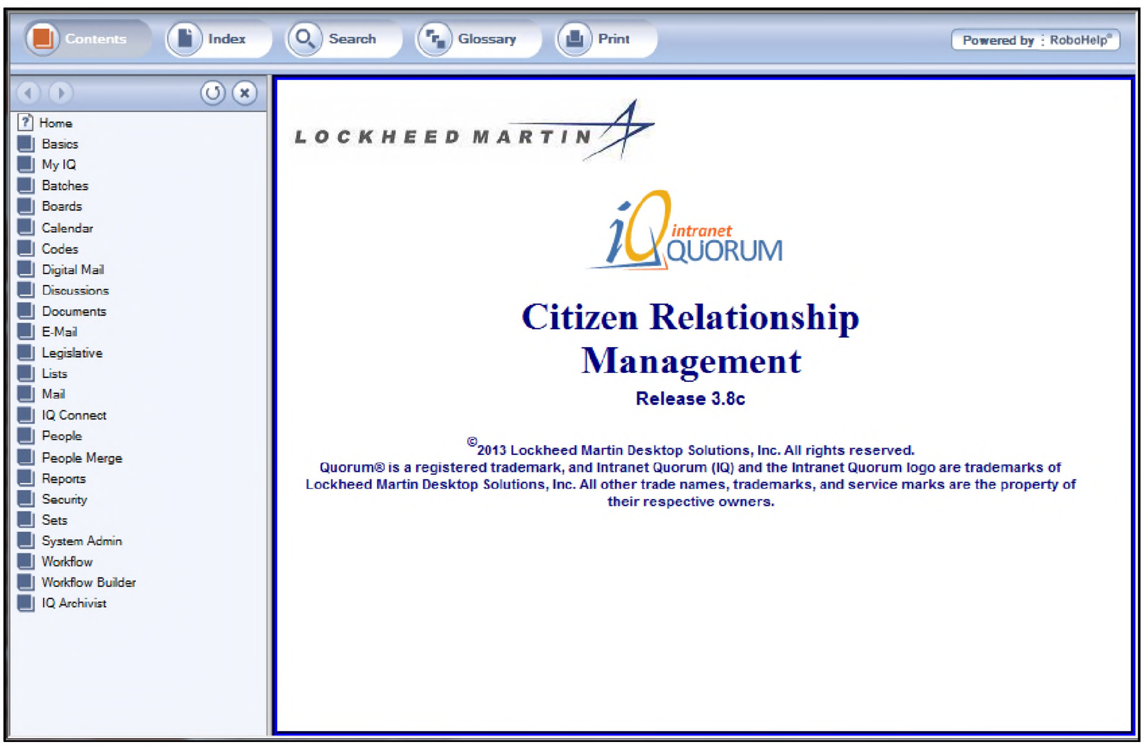
This module includes the following submenu: *Users*, *Lists*, *Profiles*, *Groups*, *Departments*, *Record Security*, *System*, *Tools*, *IMA Incomings*, *IMA Rules*, *Utilities*, *Custom Fields*, and *Diagnostics*. Access to the Admin Module is limited to IQ users having the appropriate Security settings in their User records. Individual Admin submenu items may be restricted by Security settings, as well.

IQ Help and Tutorial

IQ 3 Help provides an overview of the IQ configuration; describes the various Modules, Record pages, Actions and links; and gives in-depth explanations of how to perform specific functions in IQ.

Clicking the **Help** link on the Utility Bar, or the help icon in a record page, will launch IQ Help in a separate browser window. You may choose to search for information using the navigation pane on the left side of the page, or by using the Search button at the top of the page to type in key words.

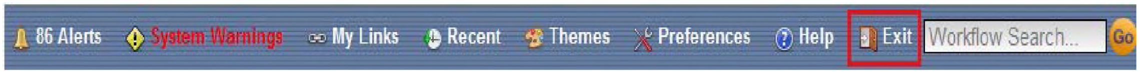
Links are embedded throughout for easy navigation to related topics. The Index and Glossary also display words and topics as links for accessing them directly. A Print option is provided, as well.



Notes

Logging Off of IQ

Properly logging off of IQ maintains security and helps keep the workstation and servers running at optimal speed.



How to Log Off of IQ:

1. Click the **Exit** link that appears on the Utility Bar.
2. When prompted, click **Yes** to close the window, or **No** to log in to IQ again.