## How to use IQ within Outlook's Add In feature

Market: House, Senate

Module: Messages

**Purpose:** This guide provides instruction on how to synchronize IQ records with Outlook using Outlook's Add-In feature so you can import the Outlook message as an IQ message record or associate the Outlook message with service records and schedule records in IQ.

**Key Benefits** 

IQ can be integrated with Outlook using Outlook's *Add In* feature. Thus, you can import Outlook messages as IQ records so that you can associate them with messages, services, and/or events records in IQ.

These steps require that IQ has been installed within the Microsoft Outlook Add In feature. Contact your IQ Consultant for this process.

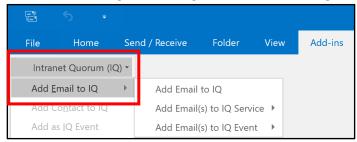
**1.** Within your Microsoft Outlook account, search and select the email that you want to import into IQ as an IQ message record.



2. Navigate to your Outlook menu and select Add-ins.



**3.** Select Intranet Quorum (IQ) > Add email to IQ.



**4.** Select an option.

## **Option 1: Add email to IQ.**

This option will import your Outlook email message into IQ and will saved it as an IQ open message.

Intranet Quorum (IQ) 🔻	
Add <u>E</u> mail to IQ	Add Email to IQ
Add Co <u>n</u> tact to IQ	Add Email(s) to IQ Service 🕨
Add as <u>I</u> Q Event	Add Email(s) to IQ Event

- 1) Outlook Add In will search your IQ contact records using the email sender's name.
- 2) Based on the results, click the contact who matches with the sender of the email. You will see the phrase, "matched to contact with ID \_\_\_\_\_" once you have selected your contact.
- 3) If the contact does not exist, click search again to confirm the search.

Pref	fix	Firs		Middle			Suffix						_	
	~	Jona	than		Kilgore					Matched to	Contact v	vith ID #71	<u>18120</u>	
QC	Contact Red	cords	Address	& Phone Nu	umbers S	Service N	lessage Up	loads	Message E	Body				
	Name	H/	Line 1	City	Sta ZIP	Title	Org.	Birthd	Comment	H.Phone	B.Phone	E-Mail	C.Phone	ID
Þ	Jonathan	H		unknown								Jonath		71
۲.												ļ		
<														
<										ļ				
<										ļ	Detach	Searc	h Again	
¢											Detach	Searc	h Again	
¢											Detach	Searc	h Again	
<											Detach	Search	h Again Close	

- 4) Click the **address & phone numbers tab.** Enter the contact information.
- 5) Click Add Contacts to IQ.

🛃 IQ Contact ar	nd Message/Se	rvice Entry						_		×
Prefix	First	Middle Las	t	Suffix						
· · · ·	Jonathan	Kilg	ore		$\sim$	Matcheo	d to Conta	ct with ID #	<u>7118120</u>	
IQ Contact Reco	ords Address &	Phone Numbe	rs Service	Message Uploa	ds Messag	e Body				
Ti	tle					Туре	Home		$\sim$	
Organizat	ion				L	.,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,				
Line	ə 1									
Line	∋ 2									
c	City unknown		State	∠ ZIP						
Phone Numb and Email Add			Number/E	E-mail Address						
	Email	$\sim$	Jonathan.	Kilgore-2@leidos	.com					
		$\sim$								
		~								
		$\sim$								
Affiliati					^					
		T2 Anne Tes ST3 AAAA T								
		Air Force Vet		NTACT						
	ARMY A				~			Add Co	ontact to IC	2
< >									Clo	se

- 6) Click the **Message tab.** Select at least one issue code that applies to this message and select the contact whom to assign the message (by default it will choose you). Enter comments as needed.
- 7) Click Assign as IQ Message.

IQ Contact Re	cords Address & Phone Numbers Service Message Uploads Message Body	
Date In	3/29/2021 V In Method E-Mail V Priority 0 - None V	
Issues	AGR Agriculture AGN Animals ART Arts and Humanities BANK Banking and Finance BUD Budget and Economy CASEWORK Help With a Federal Agency	~
Assigned To	Jonathan Kilgore Jonathan Kilgore 🗸 🗸	
Comments		^
		$\sim$
	Detach Add Message to Existing Service Link to Existing IQ Message	Assign as IQ Message
< >		Close

**Note:** Selecting the **Service** tab also allows you to import this message into an IQ service record. As displayed on the screen shot, navigate to **Service tab.** Select a service option. This method allows you to confirm that that correct contact was selected prior to creating a new service using the Outlook message.

ervice Options: Ocreate	New Service Add to Person's Service	● ○ Add to My Service ○ Add to Service #
Create New Service	<u> </u>	
Select Service Templete		
Select Service Template to Create New Service	Art Competition	<u> </u>
	Background Memo Casework	
	Commendations and Greetings	
	Cosign Policy Letter Request	
	Cosponsor Request	
	Flag Request	
	Internship Request Legislative	
	Legislative Actions	
	Legislative Project	
	Media Request	Create New IQ Service
	Military Academy Nominations	
	Misc Legislative Request	Create New IQ Service With Message

**Option 2: Add email(s) to IQ Service.** This option will import your Outlook email message into IQ and will saved it as an IQ open message that is associated with a new service record, or an existing service record in IQ, or a Service ID number.

Intranet Quorum (IQ) -	
Add <u>E</u> mail to IQ	Add Email to IQ
Add Co <u>n</u> tact to IQ	Add Email(s) to IQ Service 🕨
Add as <u>I</u> Q Event	Add Email(s) to IQ Event

**Creating a new service** allows you to choose your service type and immediately create a new service with this message attached to it along with the contact who sent it.



Add to a Pending Service in IQ gives you a list of your active services in IQ in which you can select to associate the Outlook message.

Servic	Opened	Primary	Template	Comment	Due	^
801	3/29/2		Casew			
ou i	3/2/20	Quoru	Casew			
800	2/3/20		Flag R			
800	1/27/2	Quoru	Flag R			
800	1/22/2		Flag R			
800	1/14/2	Quoru	Casew			
800	1/7/20		Casew			
800	1/4/20		Casew			
800	12/31/	Hacket	Casew	Need h		
800	12/28/		Sched	This is		~
					>	

Add to IQ Service by ID # allows you to type in a specific Service ID # and send the message to that Service.



**Option 3: Add email(s) to IQ Event.** This option allows you to quickly **create a new event in IQ** and associate it with the Outlook message or **associate the message to an existing IQ event**. These options require you to choose which calendar to add the event to and fill in other details for the event.

Add IQ Eve Calendar	nt						
caseworker k	ilgore				Status		
sabella Stror Jonathan Kilo						$\sim$	
Lori Zeoli					Private E	vent	
					Major Ev	ent	
Date	3/29/2021 ~						
Start Time	4:45 PM 🖨	End Time 4:4	15 PM 불	Time Zone	Eastern	$\sim$	
Summary						~	
Notes						~	
						$\sim$	
Description							
Description							
Topics	AG Agriculture BNK.FIN Banking BUD Budget Issu DEF Defense	and Financial es			~		
Office				~			
Address 1							
Addess 2							
City			State	✓ ZIP			

¢	🔁 A	dd Emai	l(s) to IQ e	event				×
	1 email record(s) selected for uploading to IQ event							
		Select	from exist	ing IQ eve	ents fo	r Jonathar	n Kilgore	
		Monda	ay, Ma	rch 29, 2	2021	🛛 🔻 thru	Tuesda	ay
		Event	Starts	Ends	Time	Summary	Notes [	De
	•	3/29	12:00	10.00	ET	Weekl		
		3/29 3/30	9:00 AM 1:00 PM	10:00 3:00 PM	ET ET	Weekl Educat	Meetin we	
	<							>
		Skip e	mails previ	iously uplo	aded to	events		
					Sa	ave	Cancel	
				_				_



1) Within Outlook, select the Calendar icon.



2) Select the event you wish to add into IQ. You should see a black outline around the chosen event.



3) Scroll to the Outlook menu at the top and navigate to Add-ins > Intranet Quorum (IQ) > Add as IQ Event.

File	Home	Send /	Receive	Folder	View	Add-ins
Intran	net Quorum (l	Q) -				
Add E	mail to IQ	•				
Add C	Co <u>n</u> tact to IQ		_			
Add a	s <u>I</u> Q Event					
			_			

4) Outlook has pulled all the information from the event you selected and applied it to the appropriate fields for IQ. Enter additional details as needed. Select **Add Event to IQ** when finished.

🕁 IQ Event Entr	/	-	· 🗆	I X	
Event					
Calendar		Otatus			
caseworker k Isabella Stror	n	Status		$\sim$	
Jonathan Kilo Lori Zeoli	ore	Private			
Date	3/29/2021 ~				
Start Time	9:30 AM 🗧 End Time 11:00 AM 🗧 Time Zone	e Eastern	$\sim$		
Summary	EXTERNAL: Webex meeting scheduled: Introduction to IQ			~	
Notes	You're the host for this Webex meeting.			<b>^</b>	
Description					
Topics	AG Agriculture BNK.FIN Banking and Financial BUD Budget Issues DEF Defense	•			
Office	~				
Address 1	https://iq.webex.com/iq/j.php?MTID=				
Addess 2					
City	State V ZIP	<u> </u>	]		
	Add Service Remove Link to IQ	Event	Add Even	t to IQ	
< >			C	lose	

5) Within Outlook, select the Contact icon.



- 6) Select the contact from Outlook that you wish to add to IQ. Navigate to Add In > >Intranet Quorum > Add Contact to IQ.
- 7) Determine if the contact already exists in your database.
- 8) Select **address & phone number** to view all of the information about the contact. Edit details and add affiliation codes as necessary and then select **Add contact to IQ**.

🕁 IQ Contact and	d Message/Ser	vice Entry		
Prefix F	irst	Middle Last	Suffix	
	ora	C. Tz	[US-US] ~	]
IQ Contact Record	ds Address & P	hone Numbers Service Me	ssage	
No matching co	ntacts found in I	Q.		

							_		×
Prefix First	Middle Last		Suffix [US-U		]				
IQ Contact Records	Address & Phone Numbe	rs Service M	essage						
Title Organization	Multimedia Prod Analyst				Туре	Busines	S	~	
Line 1	7990 Quantum Dr								
City	Vienna	State V	′A	IP 22182	_				
Phone Numbers and Email Address	Email v	Number/E-r Dora 703/	nail Addre	PSS			-		
Affiliations	AAA TEST2 Anne Tes AAAA TEST3 AAAA T AF.VET Air Force Vet AGENCYCONTACT A ARMY Army	EST3 eran	ТАСТ	~			Add Co	ontact to IQ	