

How to Track Your Assigned Service Records Modified by Other Users

Market: Federal/State/Local, House, Senate

Module: Preferences, Services

Purpose: This guide provides instruction on how to turn on the setting that allows users to identify any of their assigned service records that were modified by other users.

Key Benefits

IQ enables users to identify which of their assigned service records were modified by other users so that they can be notified immediately of those changes.

1. Navigate to **Preferences**. This menu is located under your user name on the top right corner.

Shortcuts 🗸 Lori 4	^
Log Out of FRESHMAN117	
FRESHMAN117	
About	
Preferences	
Background Jobs	

- 2. Expand Services.
- 3. Select Yes in the field, "Track all of my services changed by other users.". Click Save.

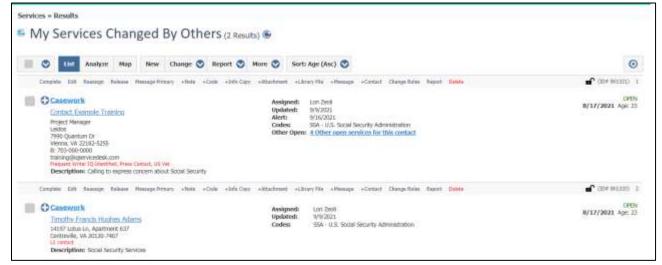
Preferences				
Services				
Default Template for New Service	Casework	*		
Automatically Delete IQ Alert when user Acquires Ownership	Yes			
Automatically Delete all related IQ Alerts when user makes any change to the service	No	-		
Close All Attached Messages When Completing Service	Prompt			
Show Quick and Suggested Letters for Service Messages	Yes	*		
Preferred Templates		0		
Preferred Applications		0		
Don't Send Reassignment/Routing Alerts for Selected Templates		0		
Show Custom Service Grids when available	Yes			
Track all of my services changed by other users	Yes			

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- 4. Navigate to the Home module. Confirm that the My Work Summary Tile is visible.
- **5.** In the **My Work Summary Tile**, the **Changed by others** link displays the number of service records assigned to you but were modified by other users. The date displayed represents the oldest date a service record assigned to you has been modified by other users.

Home	Contacts 🗸	Messages 🗸	Outre
5			
My	Work		ş
	Messages		
	pen pen and Unbatched pproval Requests ctive Batches pen Outreach		41 32 4 2 5
My	Services		
S P Q A O	pen tep Past Due ast Due lert Past Due ueued ctive pen Service Messages lonitorod hanged by others (09/0	9)	104 1 12 2 1 103 8 2 2

6. Clicking on this link redirects you to the page, My Services Changed By Others.





Clearing service records alert notifications

- **1.** Once you have reviewed these service records, you can clear the notifications. Select the records.
- 2. Click Change \ Clear Changed Alerts. The selected records will be deleted from this page.

	C List Analyze	e Map	New	Change 🦁	Report 🦁	More 🥑	Sort: Age (Asc) 🛇
	Complete Edit Reassign	Release	Message Pri	Clear Change	d Alerts		Library File +Message +Contact Change Roles Report Delete
Contact Example Training Project Manager Leidos 7990 Quantum Dr Vienna, VA 22182-5255 B: 703-000-0000 training@igservicedesk.com Prequent Writer IQ-Identified, Press Contact, US V Description: Calling to express concern abo			Tag Acquire Immediately clears logs of Close Status Codes Complete Delete Message Primary Note Priority, Due, Step Due, Alert, Description Reassign Security			of your services that were changed by other users.	
	Camplete Edit Reassign	Release	Message Prir	Add Discussion Update Data Fields Update Agency Contact Roles Reopen			Library File +Hessage +Contact Change Roles Report Delete

- 3. Navigate to the Home module. Confirm that the My Work Summary Tile is visible.
- **4.** In the **My Work Summary Tile**, the **Changed by others** link now displays only the records that have not been viewed nor cleared.