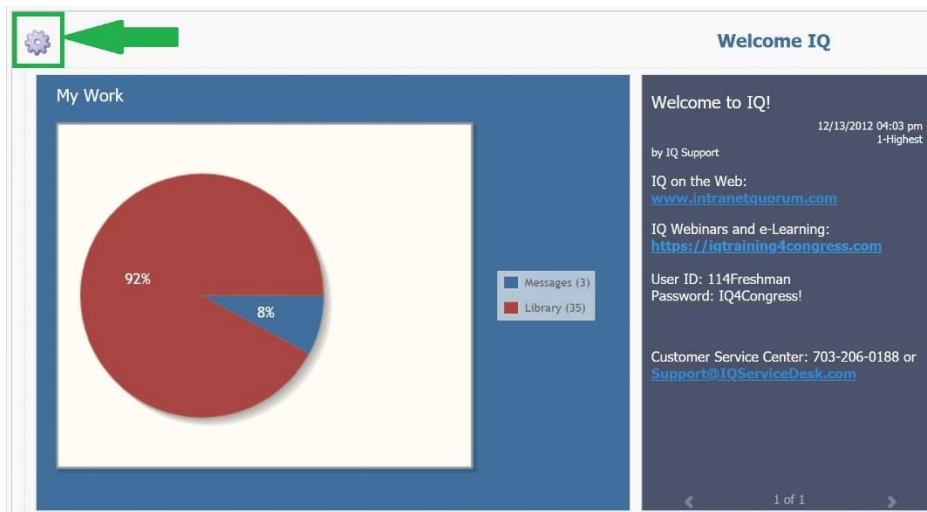


How to Customize IQ for You

Home Screen & Tiles

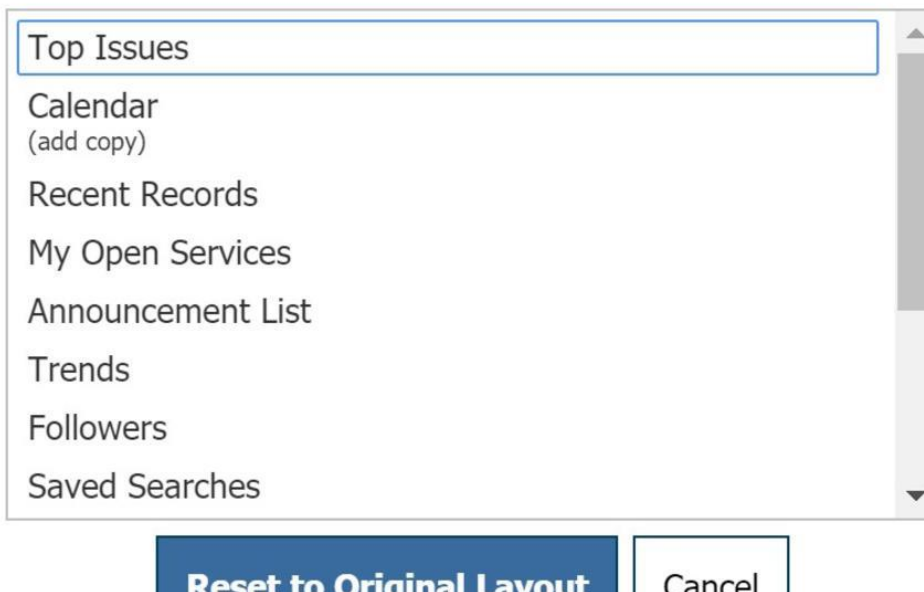
On your IQ Home Screen, you have the option of configuring it to include or exclude from our pre-defined selection of Tiles. We created these Tiles with our users in mind to allow them easier access to crucial job related info.

1. To add new tiles onto your home screen you can click the small gear icon on the top left of your Home Screen:

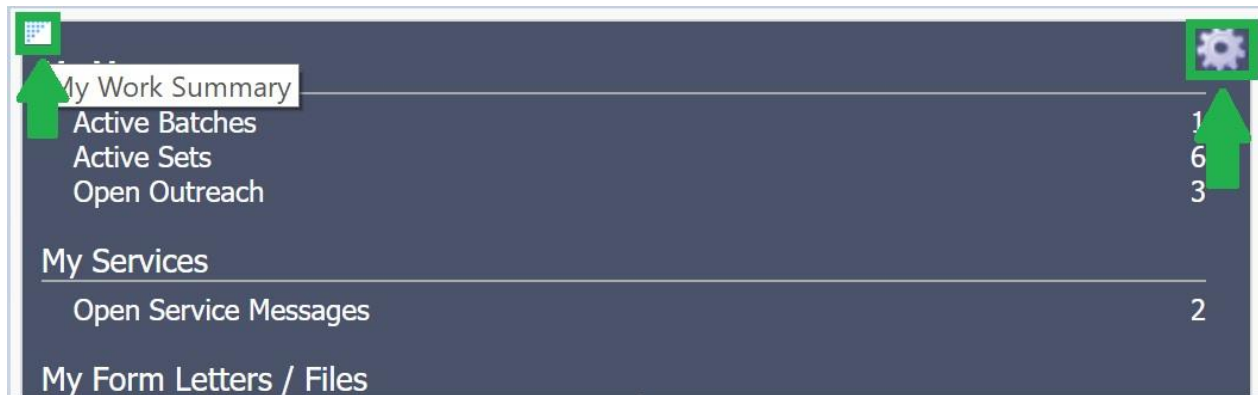


2. This will bring up the list of available Tiles that you can simply click to add to your Home Screen:

Select and Add Another Tile:



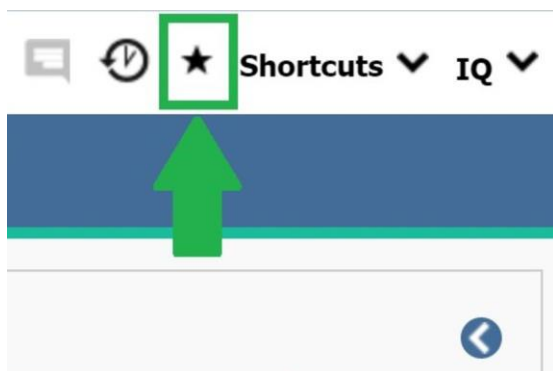
3. Home Tiles can actually be configured for different options, such as adjusting the color, size, etc. This is done by clicking on the Gear button in the Top right of the actual Tile. In addition to this, you can also drag the tiles around from the top left to move them in a different order: (click and hold to drag)



Favorites

Within IQ, you can save pages as a “favorites” (i.e. bookmarks) for easy access to later.

1. If you are on a page with “My Open Messages” and have the “Animals” issue code filter selected. You can click the favorites button (Star icon) in the top right of your IQ window:



2. Which will take you to the Favorites Screen, this is where you can choose which tab in the Big Menu where this favorite will show up and the name it will have. In this example we saved it as “My Open Messages about Animals”:

Favorites

Add to Menu:

Messages

ux/home.aspx ✕

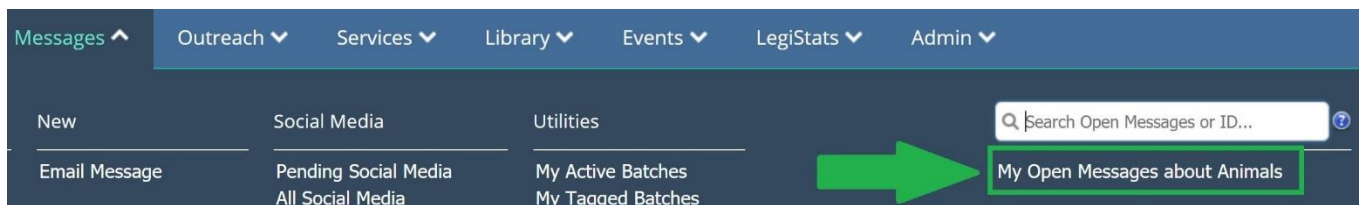
My Open Messages about Animals

Add to Favorites

Saved Favorites

You don't have any Favorites.

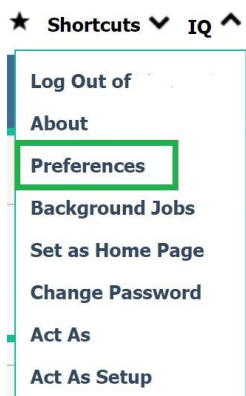
3. Once saved, the newly created favorite will show up under your Messages Big Menu ready to be clicked:



User Preferences

Your user preferences control your default settings in IQ. From here, you can hide specific big menus, set your Default Form Letter Template and much more.

1. To access your preferences you would click the "IQ" dropdown in the top right of your window and choose "Preferences":



2. You are then taken to your Preferences; from here, you can change a wide array of settings. For example, if you are an LC you can set your Default Outgoing Format for messages so that you do not have to do that every time you respond to a message. If you are a Caseworker, you can change your default Template for a new service so that every time you create one it will default to a Casework. There are many other options and if you have specific questions please don't hesitate to reach out to your IQ Consultant:

Preferences

-
General

☐ Scanning Enabled

IQ must be used within Internet Explorer in order to perform scanning.

☒ Automatically Subscribe to Discussion Topics Where I am a Participant

Open Discussion Links in

Discussion Dialog
 ▼

Hide These Modules

☐ Contacts

☐ Outreach

☐ Library

☐ LegiStats

☐ Messages

☐ Services

☐ Events

+
Contacts

-
Messages

Default Incoming Method

No Default Selected
 ▼

Default Outgoing Method

US Mail
 ▼

Default Message Status

Approved (if user security permits)
 ▼

Default Custom Letter Format

Default Template - 12pt 1in -- version 1 A
 ▼

Favorite Template

No template selected
 ▼

Default Envelope

Default Envelope -- version 1
 ▼

For Service

No Incoming
 ▼

For Service

No Default Selected
 ▼

For Service

Approved (if user security permits)
 ▼

Default Envelope -- version 1
 ▼

Save

Cancel