

# **Action Bar Icons**

Market: House, Senate **Description:** Description of the Action Bar icons

#### Configuring the Quick Action Icons

**Pinned Applications** 

**Pinned Favorites** 

#### **Configuring the Quick Action Icons**

There are several icons on the left-hand action bar and in the top upper right-hand corner of the IQ5 dashboard. Below is a glossary of the icons and their corresponding applications. The pinned Quick Actions are configurable. See below.



lcon	Application	Description
1 1		

C	Log Call	Allows you to quickly log an opinion from any application or view.
Û,	Find or Add Contact	Allows you to quickly find a contact or add a contact.
	Mobile Entry	Allows you to search for a contact, add affiliation code(s), or create a message or service.
Ø	Add New Service	Allows you to quickly create a new service request.
	Add Event	Allows you to create a new event easily and quickly.
~	IQ4 Dashboard	Takes you to a series of easy to view, clickable reports showing different aspects of your office's IQ work.
$\bigotimes$	Tour Trackr	If your office subscribes to this service, Tour Trackr allows your office to easily track and manage tour requests.
?	Help	Allows for choosing to either access IQ5 Help, Request Help, Suggest a Feature, or Report a Bug
	Option button for additional features	<ul> <li>When selected, additional options appear:</li> <li>User Settings: This is where you can set your systems preferences, pin quick actions and menus, and change settings for Messages, Services, etc.</li> <li>What's New: Click here to see the latest features of IQ5</li> <li>My History: Click here to see your history of activity within IQ5</li> </ul>



### **Configuring the Quick Action Icons**

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This option allows you to control which icons you see in the Quick Action section of the Action Bar.



1. Click on the initial of your name in the upper right-hand corner.

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	13,359			
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igned	12,732			
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2. In the drop-down, select User Settings.



3. In the User Settings window in the General tab, select the options you want displayed on the Action Bar by clicking in the Pinned Quick Actions field.

User Setting	s							×
Your Default Settings When Using IQ5								
General Me	essages	Services	Library	Events	Outlook			
Home					~			
Color Theme								
Purple					~			
Menu Width								
3 Wide					~			
📃 Open Vi	ews Me	nu When	Changin	g Featur	res			
Close Vi	<del>ews Me</del> i	nu When	Making	a Selecti	ion			1
Add Event								
Add Ser	vice							
IQ4 Dasl	hboard					Single Records		
Mobile I	Entry					Ū		
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Pinned Quick	Actions						•	
L								
Reset Other	Settings						Dor	ne

4. Select Done.

## **Pinned Applications**



Below the static horizontal line, users can "pin" applications to the action bar.

**1.** Click your initial in the upper right-hand corner and select User Settings.



**2.** Under General, in the *Add Menu(s)* as *Quick Actions* section, you can delete applications or add them by clicking in the field and selecting the application.



User Settings	×					
Your Default Settings When Using IQ5						
General Messages Services Library Events Outlook						
✓ Maximize Width of Record Detail Panel When Viewing Single Records						
Log Call × Add Contact ×						
Pinned Quick Actions	/ -					
Add Menu(s) as Quick Actions						
My Inbox X Contacts X Messages X Casework X Library X	<b>-</b>					
Admin						
Boards	<b>*</b>					
Events						
Grants						
Home	· · · · · · · · · · · · · · · · · · ·					
LegiStats	<b>•</b>					
Outreach	· •					
Services	Done					

3. Click Done.

### **Pinned Favorites**



1. Click your initial in the upper right-hand corner and select User Settings.



2. Under General, in the *Add Favorites(s)* as *Quick Actions* section, you can delete applications or add them by clicking in the field and selecting the application. To create favorites, check out the Creating and Modifying Favorites Quick Reference Guide.

User Settings	×
Your Default Settings When Using IQ5	
Gen       Contacts - Alexandria, Arlington, Centreville Contacts         Contacts - fav       Single Record         Contacts - Marine Contacts       Contacts - Zip code list         Inbox - My Open EDU Cases       Inbox - My Open FEMA Casework         Inbox - My Open HUD messages       Inbox - My Open USCIS & State Cases         Add       Inbox - My Open USCIS Casework	is •
Joy Betaharon X Allow These Users to 'Act As' Me Switch to Another User ('Act As' the Selected User)	•
Reset Other Settings	Done