

## Installing and Uninstalling IQ Outlook Add-In

**Market:** Federal/State/Local, House, Senate

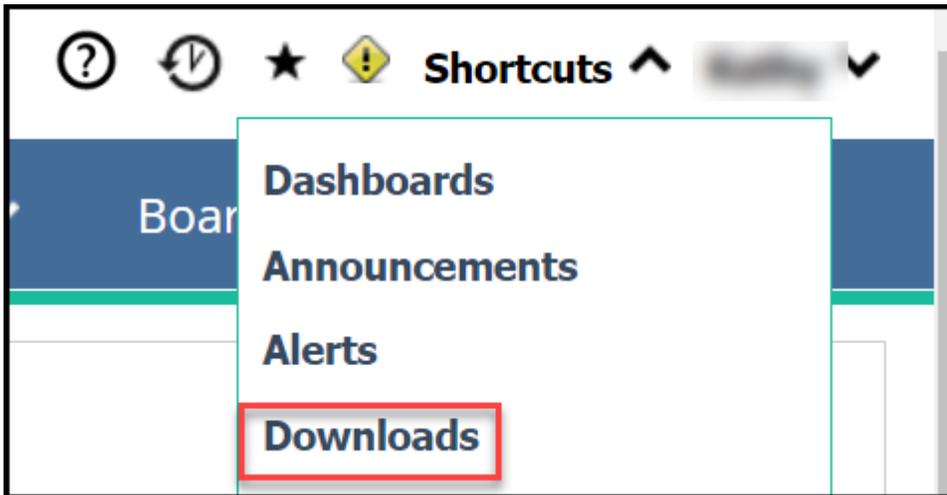
**Description:** These instructions teach users how to install IQ Outlook Add-In, which allows integration between MS Outlook and IQ4.

Click the following link to be brought directly to the subtopic:

[Uninstalling the Outlook Add In](#)

### *Configuring IQ Outlook Add In*

In order to install the IQ Outlook add-in, you will first need to log into IQ through **Microsoft Edge**. You will then need to locate the **shortcuts** menu on the top right of your home page and click it.



A drop-down menu will appear. Select the **Downloads** option and a new window will open.

### IQ Downloads and Installs

**Description**

<p><b>IQ Drag and Drop for Outlook</b> Adds drag and drop support to Microsoft Outlook to drag attachments directly from Outlook messages to IQ browser attachments dialogs. <b>Close Outlook before installing.</b></p>	<a href="#">Install</a> <a href="#">32-bit Installer (for older PC's)</a>
<p><b>IQ Outlook Add-in v. 4 for Outlook 2016+</b> Adds support to Microsoft Outlook to create IQ Contacts, Services, Messages and Events directly from Outlook message or calendar records.</p> <p>The IQ Outlook Add-in requires these prerequisites:</p> <ul style="list-style-type: none"><li>• Microsoft .Net 4.0 runtime - install through Windows Update.</li><li>• <a href="#">Microsoft Visual Studio 2010 Tools for Office Runtime</a></li></ul>	<a href="#">Install</a>
<p><b>IQEdit</b> Allows library files to be transferred directly between IQ and your computer.</p>	<a href="#">Install</a>

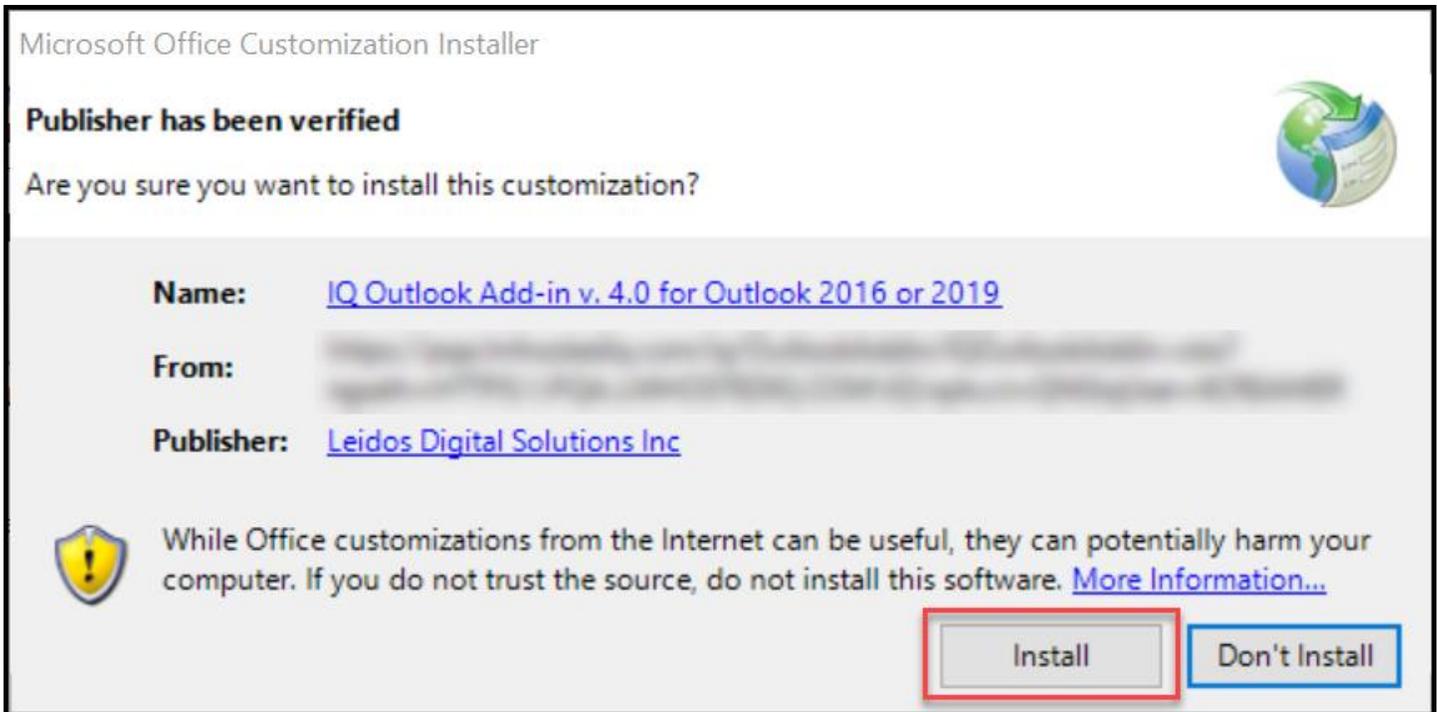
Select the option for **IQ Outlook Add-in v. 4 for Outlook 2016+**. Click **Open** on the pop up.

### Open this file?

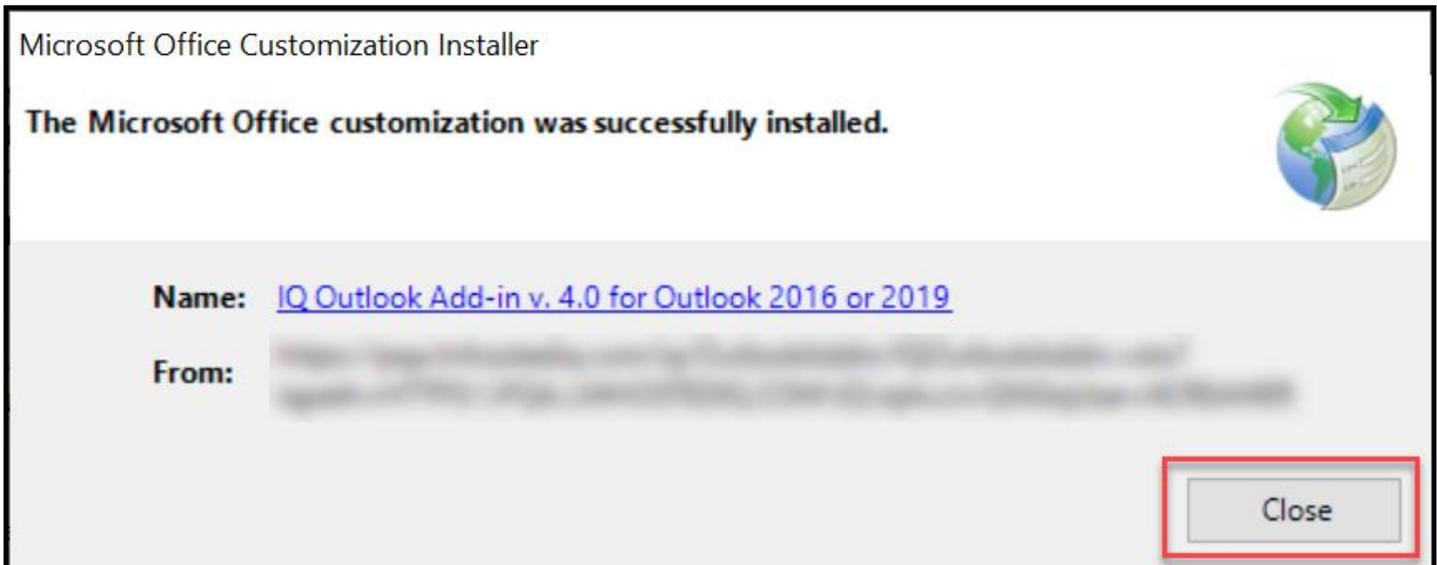
Do you want to open IQOutlookAddin.vsto from [redacted] ?

[Report file as unsafe](#)

A new window will open. Select the **install** option. After doing so the add-in will install automatically. Wait a few moments for the installation to finish.



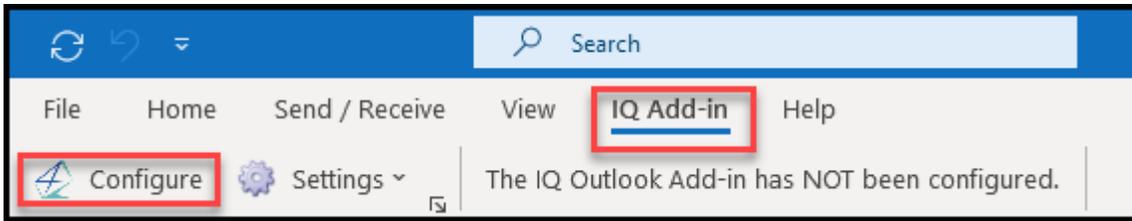
Once installed successfully, **close** the confirmation window.



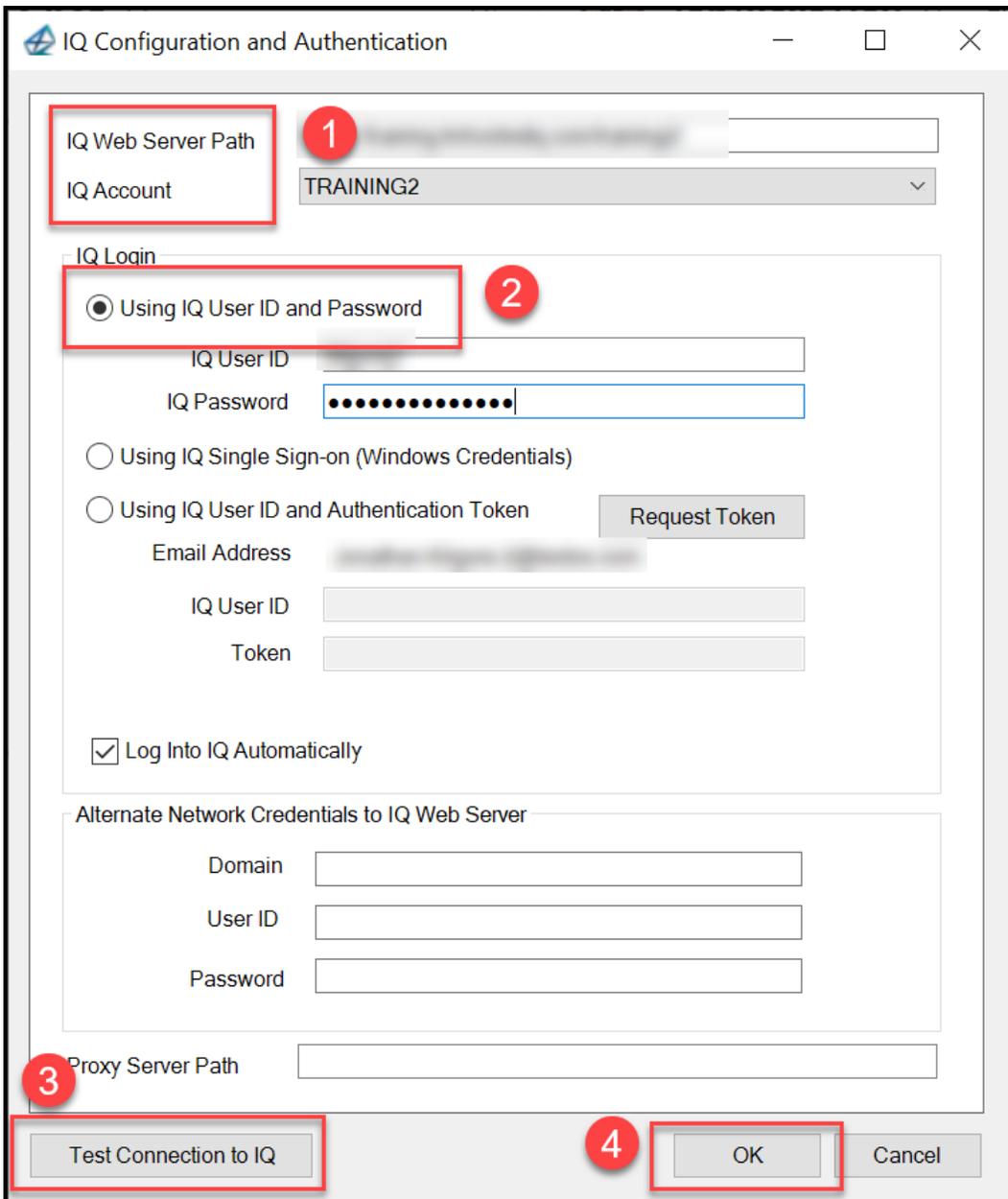
If you had **Outlook open** prior to the installation, you will need to **close and relaunch Outlook** in order for the add-in to show up.

Navigate the top menu and locate the **IQ Add-in** option.

After selecting the add-in option, you should see a **configure and settings** option. Select **Configure**.



You will now see a screen as shown below.



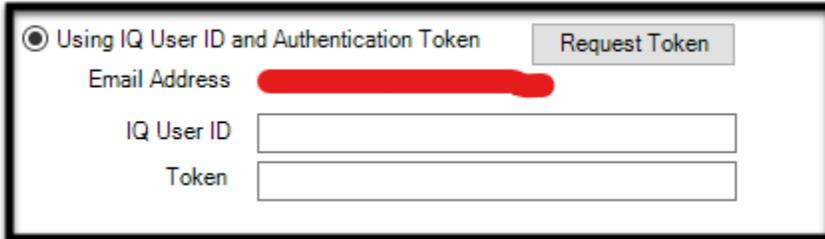
The **IQ Web Server Path** should auto populate for you. Select the drop-down menu for **IQ Account** and select the appropriate account. If the option is **blank** you will need to talk to your IQ Consultant or our Customer Service Center for assistance.

You have three different ways to log into IQ through this screen:

- **Using IQ User ID and Password**
- **Using IQ Single Sign-On**
- **Using IQ User ID and Authentication Token**

If neither **Using IQ User ID and Password** and **Using IQ Single Sign-On** work for you, choose the **Using IQ User ID and Authentication Token** option to log in.

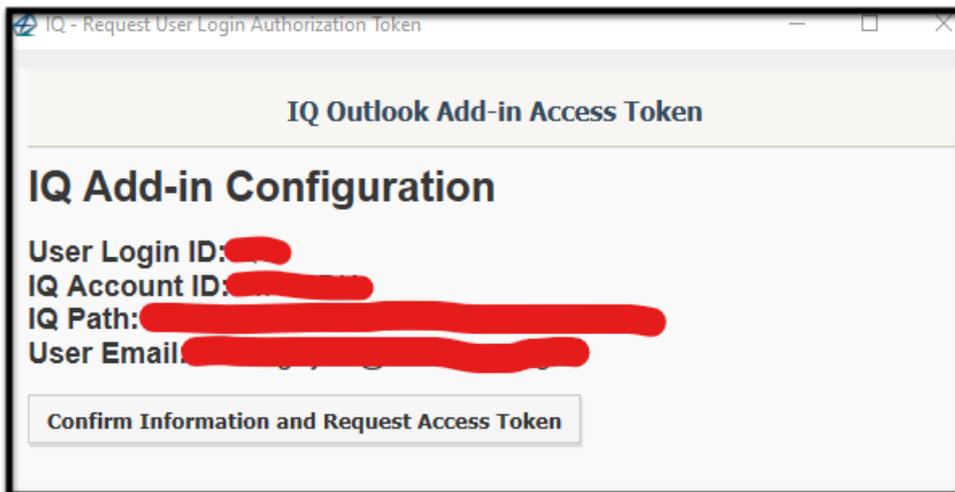
If selecting the **Using IQ User ID and Authentication Token** option for log in:



The screenshot shows a form with a radio button selected for "Using IQ User ID and Authentication Token". To the right of this option is a "Request Token" button. Below the radio button are three input fields: "Email Address" (with a redacted value), "IQ User ID" (empty), and "Token" (empty).

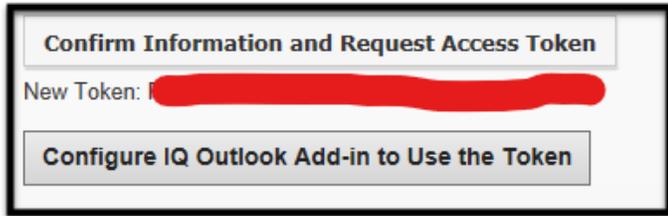
Verify that your email is listed and select **Request Token**.

A new window will open

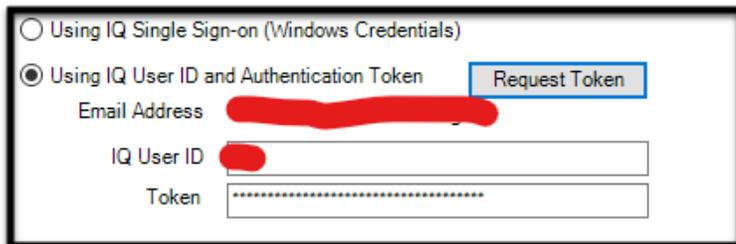


The screenshot shows a window titled "IQ - Request User Login Authorization Token". The main heading is "IQ Outlook Add-in Access Token". Below this is the section "IQ Add-in Configuration" with four fields: "User Login ID:", "IQ Account ID:", "IQ Path:", and "User Email:". All four fields have their values redacted with red bars. At the bottom of the configuration section is a button labeled "Confirm Information and Request Access Token".

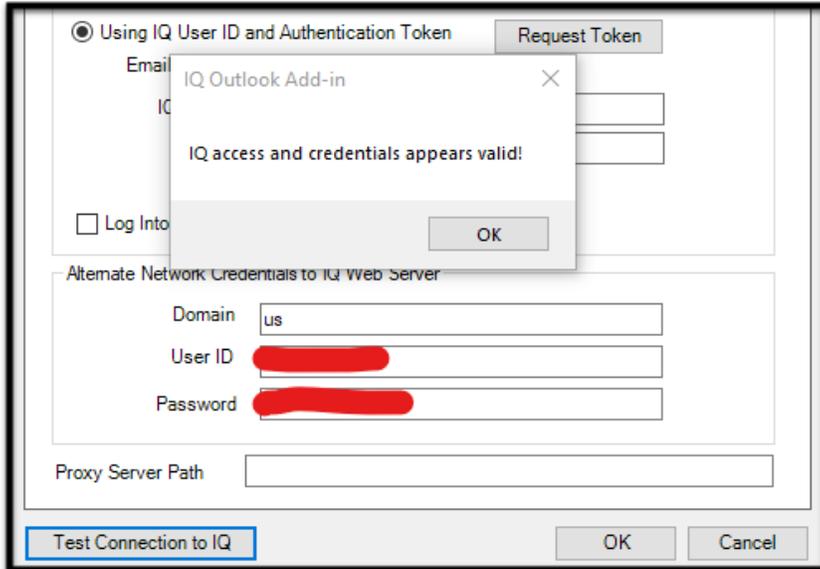
Verify that the **User Login ID**, **IQ Account ID**, **IQ Path**, and **User Email** are all correct and select the **Confirm Information and Request Access Token** option. You will then get another screen with additional token information.



Select the **Configure IQ Outlook Add-in to Use the Token** option. After selecting the option, you will see that the information is auto filled in the previous **Using IQ User ID and Authentication Token** window.

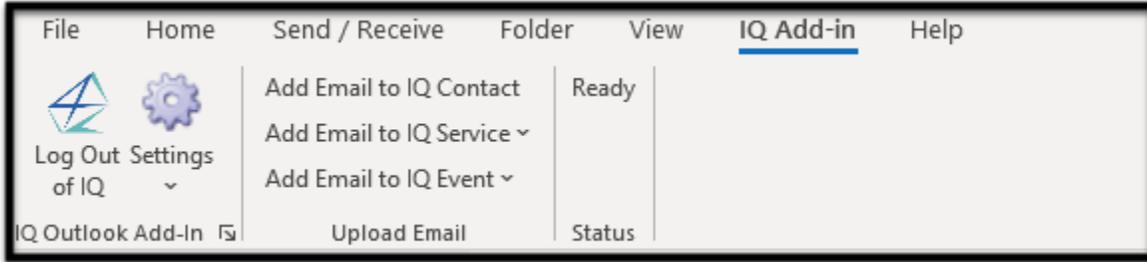


Verify that the fields now have information in them and select **Test Connection to IQ** at the bottom left of this window. After doing so, you will receive a small window that states the information is valid if everything is entered correctly.



When you receive the notification that the credentials are valid, you can now select **OK**. You can now click the **OK** option next to the cancel button to verify and proceed. (**IMPORTANT:** click **OK** only one time and wait a few seconds for it to load. Multiple clicks may cause the window to error out).

When successful you will now see different options available. You should see **Log Out of IQ, Settings, Ready status, and the IQ Upload options** available.

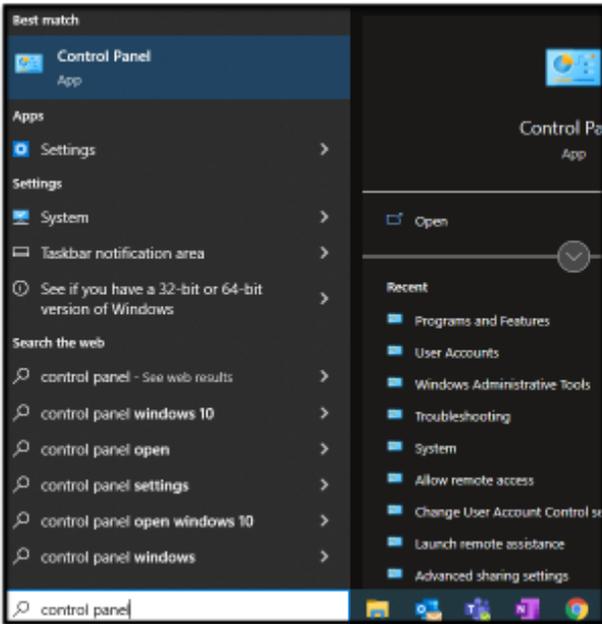


You have now successfully installed the IQ Outlook Add-in.

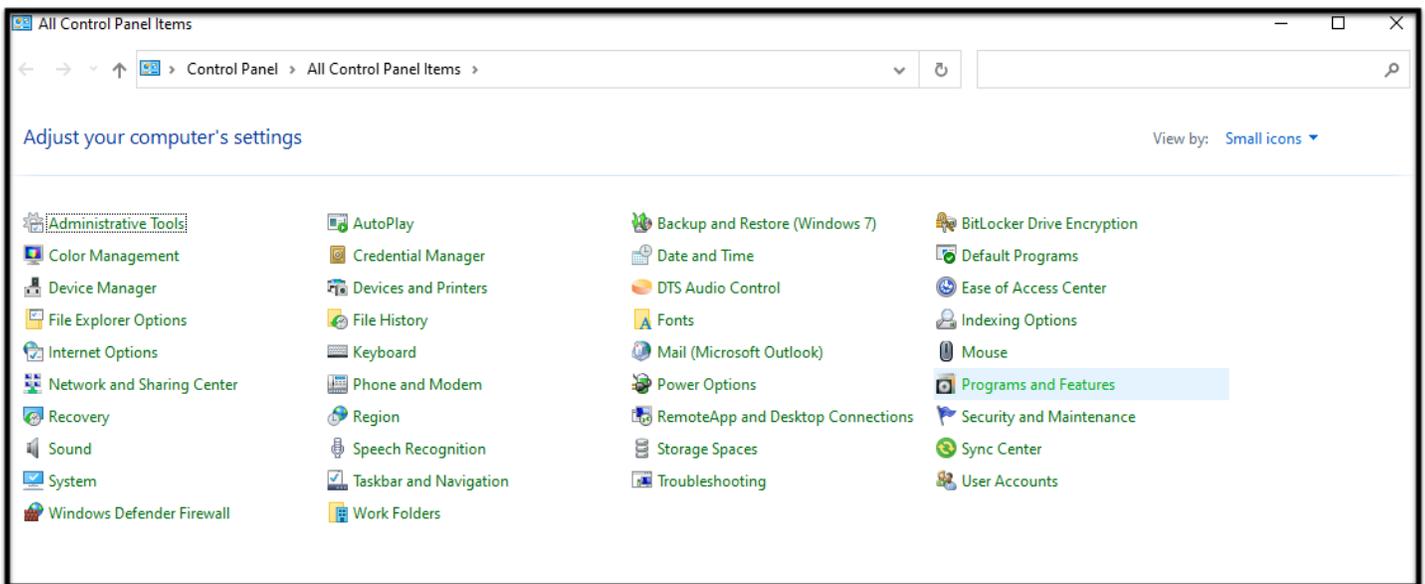
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## Uninstalling the Outlook Add In

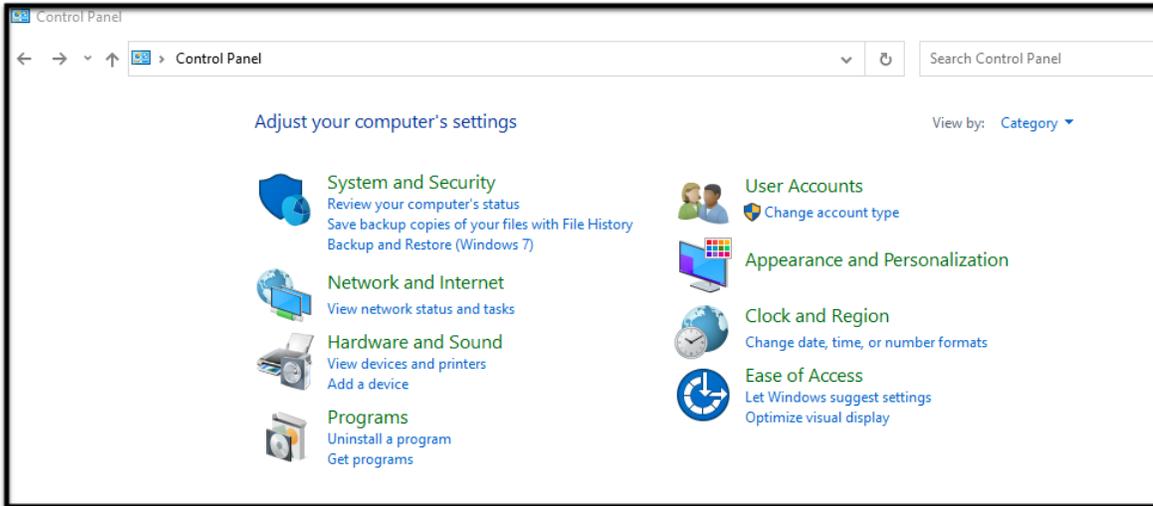
Click the **Search Bar** at the bottom left of your windows screen and type **Control Panel**. Select **Control Panel**.



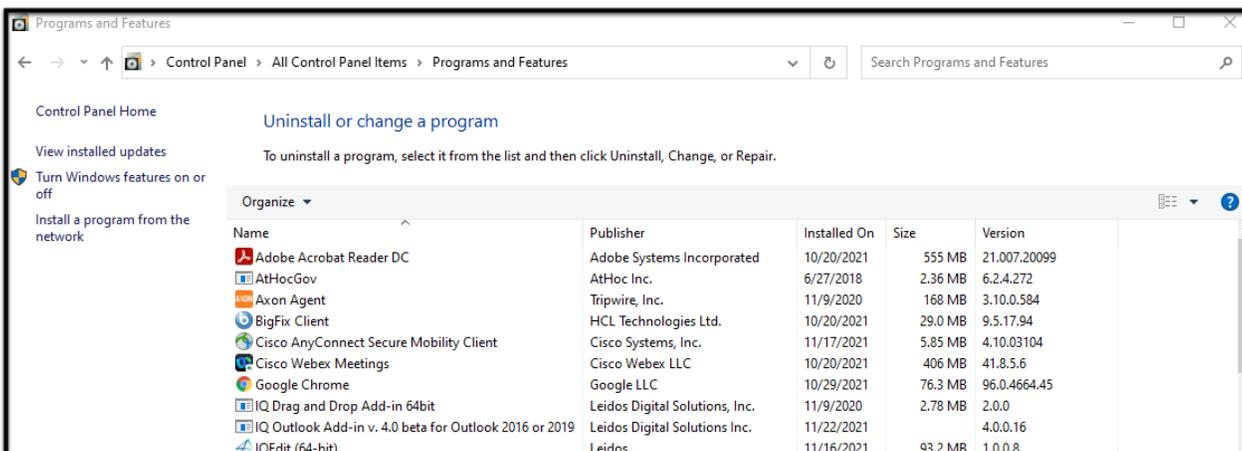
A window named **All Control Panel Items** will open. If the window is in the **View by: Small Icons** format, select **Programs and Features**.



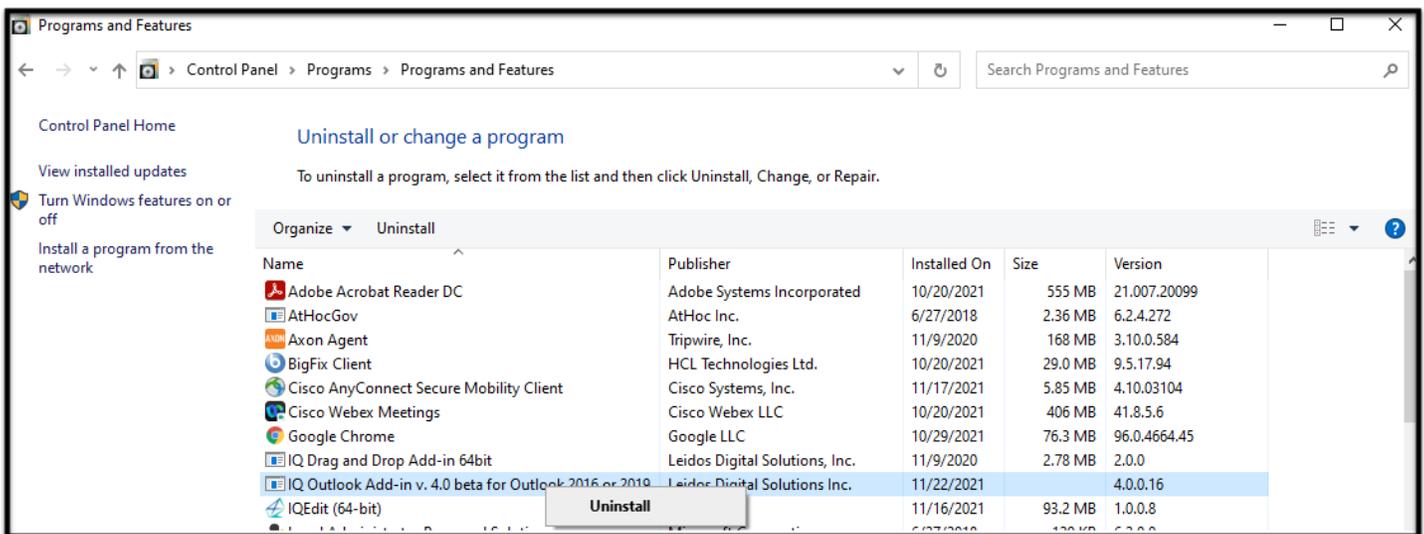
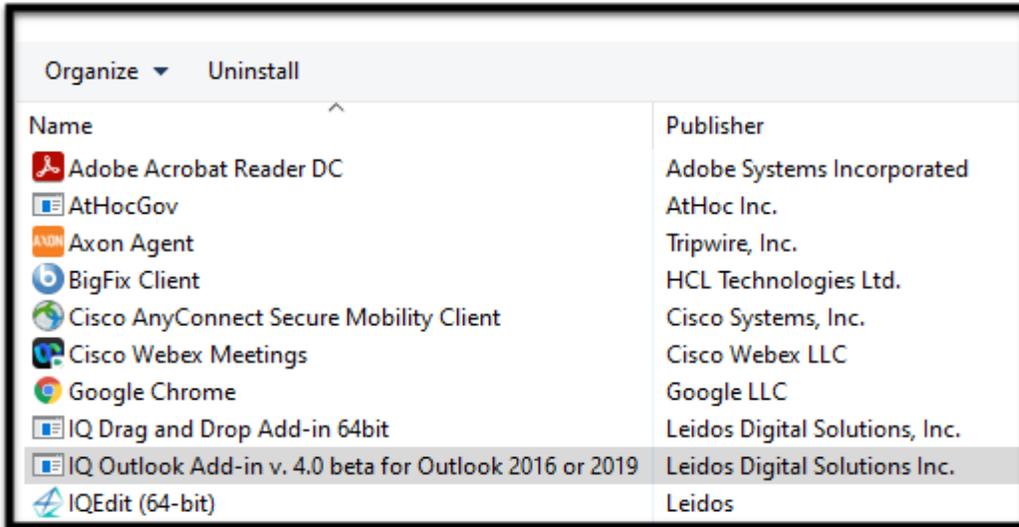
If the window is in the **View by: Category** format, select **Uninstall a program** under the **Programs** option.



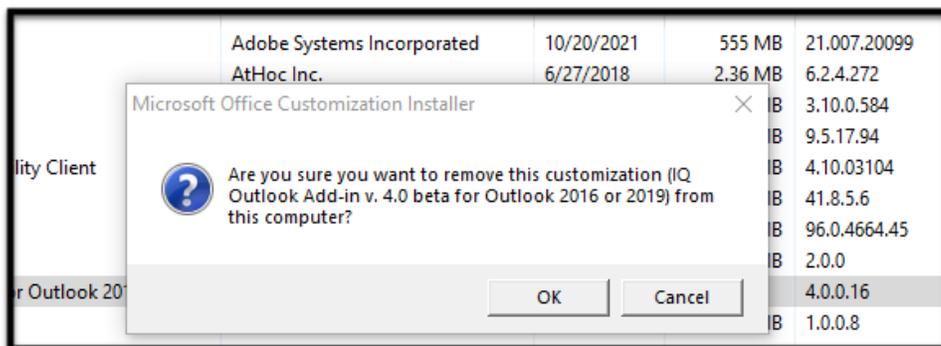
After selecting the option, you need now see a window with a list of all your programs. Locate the **IQ Outlook Add-in v. 4.0 beta for Outlook 2016 or 2019** program.



Either click the program and **Select the Uninstall option**, or right click the program and select **Uninstall**.



A confirmation window will open. Select **OK** to confirm the uninstallation.



You have now successfully removed the IQ Outlook add-in from Outlook.

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