



iQ.Suite User Portal

iQ.Suite 12 for DOMINO 6 - 8

User Manual

Document version 1.0

Imprint

All rights reserved. This manual and the programs described therein are copyright-protected products of GROUP Business Software AG, Frankfurt, Germany.

No part of this publication may be reproduced without written permission from GROUP Business Software AG.

GROUP Business Software AG is a registered trademark at the US Patent and Trademark Office.

All hardware and software names used are registered names and/or trademarks of their respective manufacturer or proprietor.

Copyright © 2009 GROUP Business Software AG, MesseTurm, 60308 Frankfurt, Germany

Issue: March 2009

▶ Table of Contents

1	Preface	1
1.1	Your New iQ.Suite User Portal	1
1.2	Purpose of the Manual.....	1
1.3	Structure of the Manual	2
1.4	License Agreement.....	2
1.5	Copyright	3
1.6	Warranty	3
1.7	Third-Party Copyright Notes	3
2	Product Overview.....	4
2.1	What is the iQ.Suite User Portal?	4
2.2	Opening iQ.Suite User Portal	6
2.3	User Interface	7
3	The Quarantine Category.....	9
3.1	What is the Quarantine?	9
3.2	What is the Quarantine Summary Notification?	10
3.3	E-mail Functions in the Quarantine	11
3.3.1	Calling Functions From the Function Bar	11
3.3.2	Performing Functions for an Open Quarantine E-mail	13
3.3.3	Adding the Sender to a Blacklist or Whitelist from the Quarantine.....	14
4	The Black- and Whitelists Category.....	15
4.1	What are Blacklists and Whitelists?	15
4.2	Functions for Blacklists and Whitelists	16
4.3	Adding a Sender to a Blacklist or Whitelist	18
4.3.1	Manually Creating a New Blacklist or Whitelist Entry	18
4.3.2	Automatically Creating a New Whitelist Entry	19
4.3.2.1	Creating a Whitelist Entry When Sending an E-mail.....	20
4.3.2.2	Creating a Whitelist Entry Without Sending an E-mail.....	20
4.4	Removing an Address From a Blacklist or Whitelist	20
4.4.1	Removing the Entire Blacklist or Whitelist Entry.....	20
4.4.2	Removing Individual Sender Addresses From a Blacklist or Whitelist Entry.....	20
5	The Absence Management Category.....	22
5.1	What is Absence Management?.....	22
5.1.1	What is a Forwarding?.....	22
5.1.2	What is a Redirection?	23

5.2	Absence Management Functions	24
5.3	Setting up Deputies for Holiday and Sickness Leaves	26
5.3.1	Setting up Standard Forwarding.....	26
5.3.2	Notify Sender Without Forwarding to Deputy	29
5.3.3	Setting up (Advanced) Forwarding for E-mails With Specific Contents.....	30
5.3.4	Forwarding E-mails From Specific Senders to Selected Persons	32
5.4	Setting up a Redirection	33
5.5	Setting up Quarantine Access for Deputies.....	35
6	The Trailer Category	38
6.1	What are Trailers?	38
6.1.1	Which Trailer Type for Which Scenario?	39
6.2	Trailer Functions	40
6.3	Integrating Trailers in E-mails	42
6.3.1	Adjusting an Existing Trailer Document.....	42
6.3.2	Creating a New Trailer Document	43
6.3.3	Changing the Language Configuration.....	44
6.4	Sending an E-mail With a Trailer	45
7	Differences Using a Web Browser	46
7.1	Opening the iQ.Suite User Portal in the Web Browser	46
7.2	User Interface	46
7.3	The Absence Management Category	48
7.3.1	Absence Management Functions.....	48
7.3.2	Setting up Standard Forwarding.....	49
7.3.3	Setting up a Redirection	52
7.3.4	Setting up Quarantine Access for Deputies.....	52
7.4	The Quarantine Category	53
7.4.1	Quarantine Functions	53
7.5	The Blacklist/Whitelist Category	55
7.5.1	Blacklist/Whitelist Functions	55
7.5.2	Adding a Sender to a Blacklist or Whitelist.....	56
7.5.3	Removing an Address From a Blacklist or Whitelist.....	57
7.6	The Trailer Category	58
7.6.1	Trailer Functions.....	58
7.6.2	Adjusting an Existing Trailer Document.....	59
7.6.3	Creating a New Trailer Document	61
8	Delayed Sending of Messages.....	62
8.1	Delayed Sending Using Keywords	62

1 Preface

1.1 Your New iQ.Suite User Portal



The iQ.Suite User Portal provides a user interface designed to help you manage your e-mails.

You will be periodically informed of any e-mails blocked and moved to the iQ.Suite Quarantine¹. Mails classified as spam can still be viewed or sent to your mailbox after all - no message is lost.

In addition, you have the possibility to assign senders and recipients of quarantined e-mails to blacklists or whitelists², thus enabling you to decide for yourself which e-mails are to be blocked and quarantined and which ones are to be delivered in the future.

Also, the Portal allows to set up various absence handling rules, with mails redirected or forwarded to specific colleagues or substitutes.

Good luck with your iQ.Suite User Portal!

Your GROUP Technologies Team



1.2 Purpose of the Manual

This manual provides a detailed description on how to use the iQ.Suite User Portal correctly. In this manual, we have attempted to express ourselves as clearly and efficiently as possible. Should you have any suggestions for improvements, please do not hesitate to write as an e-mail:

manual@group-technologies.com

1. Whenever an e-mail is not delivered, it is stored in the Quarantine. Refer to ["What is the Quarantine?" on page 9.](#)
2. Refer to ["What are Blacklists and Whitelists?" on page 15.](#)

1.3 Structure of the Manual

This manual uses the following conventions:

Bold Menu names and entries, window names, entry and list boxes, messages, file names and important information are shown in **bold** type.

Italics Entries that can or must be made by the user are shown in *italics*.

Fixed width Program code and folder names are shown in fixed width font.

Links Underlined text is a [hyperlink](#). It is usually blue.

The following symbols are used:



The info symbol is used to draw your attention to special points that must be observed for trouble-free use of your system.



The eye means "Attention!" Be careful! It indicates important passages in the text that must be observed in order to avoid any loss of data, damage to your system or any other unpleasant occurrences. Read these passages with particular care and attention.



A little gift to help you! Here, we offer support on particular problems, we provide tips and tricks or alternative solutions and special points.

1.4 License Agreement

To use any of the functions described in this documentation requires a valid license for the corresponding modules:

- **Absence management: iQ.Suite Clerk** module
- **User-specific Quarantine:** iQ.Suite with at least one module (any)
- **Black-/Whitelists: iQ.Suite Wall** module
- **Trailer: iQ.Suite Trailer** module
- **Delayed sending (attachment): iQ.Suite Smart** module

All functions depend on the iQ.Suite configuration on the Domino server. Therefore, the functionality available to you may differ from the one described here. If you have any questions please contact your administrator.

1.5 Copyright

GROUP Technologies AG, hereafter referred to as GROUP, is the owner of the full commercial copyright of this documentation protected by law. All rights not explicitly granted remain the property of GROUP.

Copyright 1992-2008 GROUP Technologies AG, all rights reserved.

1.6 Warranty

GROUP is unable to guarantee, either explicitly or tacitly, the quality, execution, standardization or suitability for a specific purpose.

The product descriptions are general and descriptive in nature. They can be interpreted neither as a promise of specific properties nor as a declaration of guarantee or warranty. The specifications and design of our products can be changed at any times without prior notice, especially to keep pace with technical developments. For information updates, please contact our Sales Department.

1.7 Third-Party Copyright Notes

IBM, AIX, zOS, OS/400 are trademarks of International Business Corporation. Lotus, Lotus Notes and Lotus Domino are registered trademarks of IBM.

Microsoft, MS, MS-DOS, Windows, Windows 2000/XP/2003 are registered trademarks of Microsoft Corporation.

Solaris is a registered trademark of Sun Microsystems, Avira and AntiVir are registered trademarks of Avira GmbH. McAfee is a registered trademark of Networks Associates, Inc. Any other products mentioned in this documentation are subject to their manufacturers' copyright provisions.

2 Product Overview

2.1 What is the iQ.Suite User Portal?

The iQ.Suite User Portal is the user interface available to iQ.Suite end users. The iQ.Suite User Portal provides the environment needed to organize your e-mail communication, thus saving precious time and increasing productivity. Depending on the privileges granted by your administrator, some or all of the functions described hereafter will be available:

■ Absence Management

Whenever you have planned an absence (vacation, business trip, etc.), the absence management functions allows to set how your electronic mail is to be handled during your absence. For instance, it may be useful to have the e-mails forwarded to a deputy to ensure that your mail is taken care of although you are not available personally. In addition, allows to set different actions for specific e-mails, for instance to forward e-mails from specific senders to another deputy or to disable forwarding altogether for specific e-mails (e.g. confidential information). You can set up notifications and read conformations for senders, recipients and deputies, for instance to inform the sender that his e-mail has been forwarded to a deputy.

Besides temporarily forwarding e-mails, Absence Management also allows to set up a permanent redirection of e-mails from specific senders to another person.

■ Quarantine

The quarantine is a separate area of the iQ.Suite User Portal used to collect all unsolicited e-mails such as spam that were originally addressed to you. Once identified as "unsolicited", the e-mails are "blocked", stored in this quarantine and not delivered to you. If you wish to view the quarantined e-mails, you can simply open the quarantine and have the e-mails displayed. However, for security reasons, access to virus-infected e-mails is excluded. Where required, you can also decide to send quarantined e-mails to your mailbox after all, for instance if you wish to receive specific newsletters that are being systematically quarantined. For a permanent solution, such senders can be added to a whitelist (see below).

■ Black-Whitelists

Whitelists³ are used to define trustworthy senders, whose e-mails you wish to receive although they were classified as spam according to your company's policies and therefore moved to the quarantine. To avoid having to manually resend these e-mails from the quarantine, simply enter these senders in your personal whitelist. This will make sure that any e-mails from these senders will no longer be checked for spam and quarantined.

Conversely, you can also add senders to a blacklist. These will be the senders from whom you definitely do not wish to receive any e-mails but whose e-mails were not identified as spam so far and therefore delivered to your mailbox.

■ Trailer

Trailers are text modules that are automatically appended to all of your outbound e-mails. This allows to attach uniform salutations, address information or other data to all outbound e-mails. The text modules are specified in Trailer documents, which you can also use, for instance, to set a specific period of validity for more complex trailers such as disclaimers or promotional attachments. In this way, the trailer will only be appended to outgoing e-mails for a specific period of time. Creating and editing the Trailer documents can be performed most conveniently in the User Portal or via web access.

3. Refer to ["What are Blacklists and Whitelists?"](#) on page 15.

2.2 Opening iQ.Suite User Portal

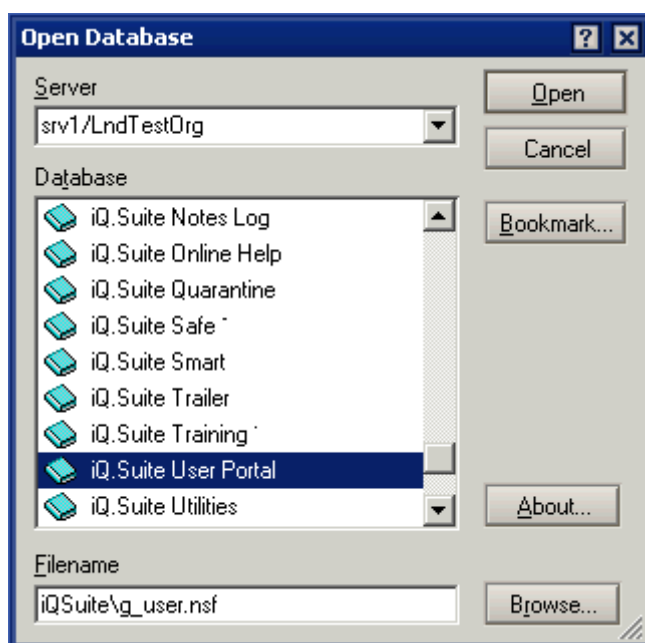
Primarily, the iQ.Suite User Portal is a Notes application. Typically, a Notes application consists of several Notes databases. A Notes database, in turn, can be used to perform certain functions or applications.



Instead of the Notes client, you may also use a web browser to open the iQ.Suite User Portal. As the functionality is basically the same (or almost) for a Notes client and a web browser, the description in the sections below applies to both methods. If there are differences however, you will find a reference to the separate chapter [“Differences Using a Web Browser”](#).

Start your Notes client and open the iQ.Suite User Portal. If this database is not available yet, proceed as follows:

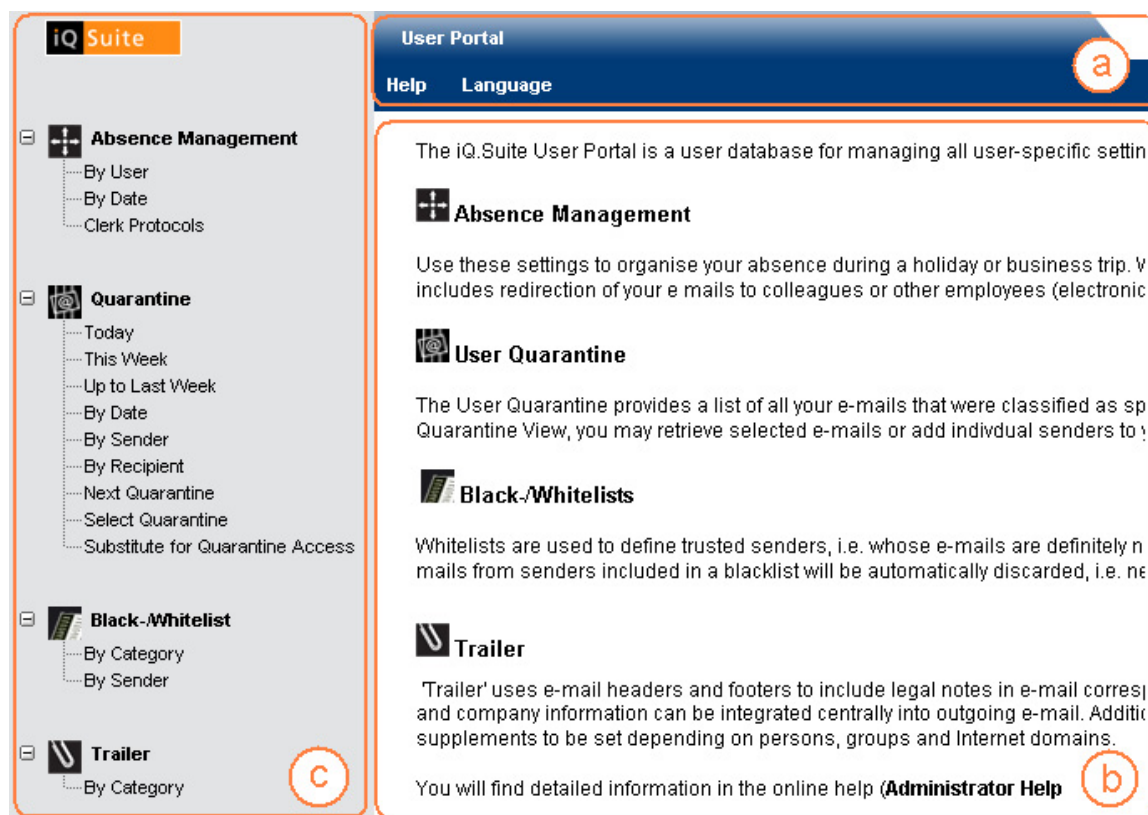
1. Click **File** → **Database** → **Open**:



2. Now, under **Server**, select the Notes server where the current iQ.Suite User Portal is located. For the name of the server (and the corresponding directory on the server), please consult your administrator.
3. Then select the iQ.Suite User Portal 11 database and click **Open**.
The name of the database displayed under Filename is **g_user.nsf**. If an error message is displayed while attempting to open the database, you may not have appropriate rights to the database. In that case please contact your administrator for further assistance.

2.3 User Interface

After having opened the database, the following iQ.Suite User Portal screen (main menu) appears. In the web browser, this screen looks slightly different, refer to [“Opening the iQ.Suite User Portal in the Web Browser” on page 46.](#)



The iQ.Suite User Portal screen is divided into three areas (a through c):

a Function bar: The functions provided here depend on the module selected. The initial screen only displays the **Help** and **Language** functions:

- **Help**

If you need explanations or additional information, click on **Help** to access both the present User Portal documentation and the Administration Manual as .pdf files.

- **Language**

To select your preferred language, click on **Language**. The most important screen elements will be displayed in the preferred language. Unfortunately, for platform-specific reasons, it is not yet possible to provide all of the screen elements in a selectable language. Therefore, some of the labels are displayed in English only. The technical resources of Notes were used as far as possible in order to provide a choice of languages for a maximum of elements.



In the web browser, the language is set under **Tools → Internet options → General → Language**



Display window

Area where the actual content is displayed.



Module menu bar (navigation)

Area where you can navigate within categories and sub-categories of individual modules.

The module menu bar is divided into sub-categories, displayed in detail in the subsequent sections:

□ **Absence Management**

□ **Quarantine**

□ **Black-/Whitelist**

□ **Trailer**



Please note that you may not have access to all of the functions. The functions available depend on the configuration. Please contact your administrator for assistance.

To return to the starting page, click on the logo  in the upper left corner of the function bar (available in Notes client only).

To close and exit the iQ.Suite User Portal select **File → Close** or click **ESC** (Notes client) or close the browser window with **X**.

For details on using the Lotus Notes client please refer to your Lotus Notes documentation.

3 The Quarantine Category

3.1 What is the Quarantine?

The quarantine is a separate area of the iQ.Suite User Portal used to collect all unsolicited e-mails such as spam that were originally addressed to you. Once identified as "unsolicited", the e-mails are "blocked", stored in this quarantine and not delivered to you.

Once blocked, e-mails remain in the quarantine (a Notes database) until they are checked and/or deleted by an authorized user such as the administrator.

Through the iQ.Suite User Portal, you now have the possibility to view the quarantined e-mails and deliver them to your mailbox after all. For instance, this may be useful if, according to the company's policy, newsletters are to be considered spam and therefore to be systematically moved to the quarantine. Having access to the quarantine, you can decide for yourself whether or not such newsletters are spam or whether you wish to receive newsletters from specific senders.

To avoid having to resend e-mails from the quarantine that in your opinion were "wrongly" classified, you have the possibility to define blacklists and whitelists. Such a whitelist makes sure that e-mails from specific senders are always delivered to your mailbox and never quarantined - refer to ["What are Blacklists and Whitelists?" on page 15](#).

Depending on the iQ.Suite configuration, you will be sent so-called quarantine summary notifications by e-mail. These notifications provide information on the e-mails stored in your quarantine, refer to ["What is the Quarantine Summary Notification?" on page 10](#).

Opening e-mails in the quarantine

To open an e-mail stored in the quarantine,

- a) select the **Quarantine** menu in iQ.Suite User Portal, refer to ["E-mail Functions in the Quarantine" on page 11](#), or
- b) use a quarantine summary notification, refer to ["What is the Quarantine Summary Notification?" on page 10](#).

3.2 What is the Quarantine Summary Notification?

To avoid having to regularly check your quarantine for e-mails, a quarantine summary notification is periodically sent to all users by e-mail. This summary notification contains a list of all of your quarantined e-mails as hyperlinks. Simply click on the hyperlink to open the e-mail.



In case you do not receive any summary notifications, please contact your administrator.

Open the quarantine summary notification in your mailbox:

The screenshot shows an email header for a message titled "'Domino - iQ.Suite Quarantine Demon'" received on 17.12.2007 at 16:00. The recipient is David Galler/DEV/myco. The subject is 'Summary report from G'. Below the header, the email content starts with 'GROUP Wall' and 'Server: Domino', followed by the text 'Your new spam mails in Quarantine.' Below this is a table listing the quarantined emails.

Sender	Date	Subject	Actions
'DiMeo - iQ.Suite Quarantine Demon'	01/16 01:00 PM	Summary report from	Open with Notes Open with Browser mail to me resend add sender to global whitelist add sender to global blacklist

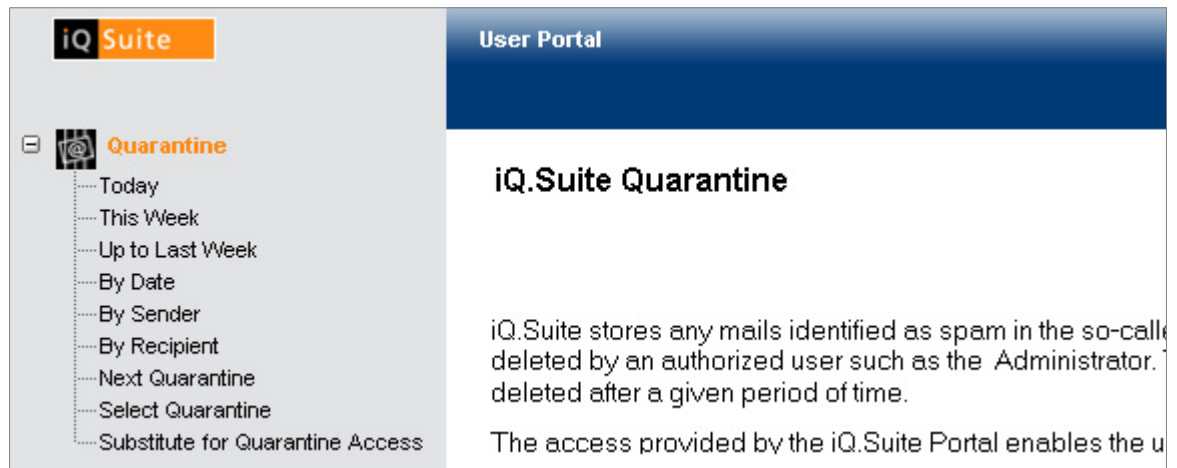
The list contains all of your e-mails that have been quarantined since the last quarantine summary report. The entries underlined in blue are the hyperlinks, which can be used to perform different e-mail actions:

- Select **Open with Notes** or **Open with Browser** to access the quarantine of the iQ.Suite User Portal (through the Notes client or the web browser). The quarantine contains all e-mails classified as "unsolicited" and therefore not delivered to your mailbox.
- Select **mail to me** send the e-mail from the quarantine to your mailbox.
- Select **resend** to send the e-mails from the quarantine.
- Select **add sender to my whitelist** or **add sender to my blacklist** to add sender address of the selected e-mail to your whitelist or blacklist, refer to ["What are Blacklists and Whitelists?" on page 15](#).

3.3 E-mail Functions in the Quarantine

To open an e-mail that was blocked and stored in the quarantine, select

- a) a quarantine summary notification, refer to [“What is the Quarantine Summary Notification?” on page 10](#), or
- b) open it directly from the iQ.Suite User Portal, refer to [“Opening iQ.Suite User Portal” on page 6](#).

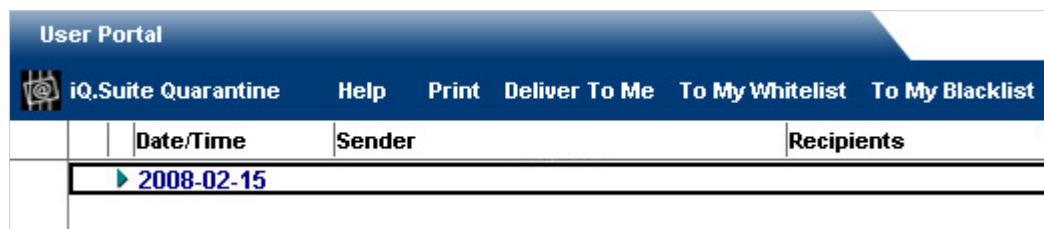


The **Quarantine** category is divided into several subcategories (**Today**, **By sender**, etc.), which allows to select different views and sorting options for your quarantined e-mails. For instance, to view all quarantine e-mails that you have received within a week, select the subcategory **This Week**. Double-click on an entry to display the quarantined e-mails individually.

When called for the first time, opening the database may take somewhat longer!

3.3.1 Calling Functions From the Function Bar

In each **Quarantine** subcategory and whenever you open an individual quarantine e-mail, the function bar provides access to various functions that can be applied to the e-mails. As a typical standard user, the following functions are likely to be available to you:



- iQ.Suite <module name>

Provides information on the database currently selected. Your administrator may have given you access to several databases. You can switch from database to another by clicking on the **Next database** subcategory. As of four configured databases, a **Select database** subcategory is displayed for selection purposes.


■ **Help**

If you need explanations or additional information, click on **Help** to access both the present documentation and the Administration Manual as .pdf files.

■ **Print**

A printer selection window is opened to **print** the current view.

■ **Deliver To Me**

The selected e-mail is delivered to you. This does neither mean that it is removed from the quarantine nor does it have any effect on future incoming e-mails! The e-mail is simply delivered to your mailbox and marked with an  icon in the quarantine.

■ **To My Whitelist**


The sender of the e-mail is added to your whitelist⁴ and now belongs to the trustworthy sender addresses. E-mails from this sender will be automatically delivered to you.

■ **To My Blacklist**


The sender of the e-mail is added to your blacklist and now belongs to the non-trustworthy sender addresses. E-mails from this sender will be automatically blocked, quarantined and not delivered to you.

Depending on the rights granted, one or more additional functions may be available in the function bar:

■ **Resend**

The e-mail is resent via the Notes client. You can decide whether the e-mail is to be delivered to your own mailbox or another recipient (address book). This does neither mean that the e-mail is removed from the quarantine nor does it have any effect on future incoming e-mails! The e-mail is simply resent and marked with an  icon in the quarantine.

■ **Deny**

The e-mail is locked, i.e. prevented from being **resent**. A locked e-mail is marked in the quarantine with an  icon.

■ **Remove Deny**

The e-mail is cleared again, i.e. it can be **resent** again through the Notes client.

■ **To Global Whitelist**

The sender of the e-mail is added to the company's global whitelist. This means that e-mails from this sender are systematically accepted by **all potential** recipients within the company.

4. Refer to ["The Black- and Whitelists Category" on page 15](#)

Typically, a global whitelist applies to an entire domain or several user groups within your company.

■ To Global Blacklist

The sender of the e-mail is added to the company's global blacklist. This means that e-mails from this sender are systematically rejected by **all potential** recipients within the company. Typically, a global blacklist also applies to an entire domain or several user groups within your company. The e-mails from senders listed in the global blacklist are quarantined for all users involved.

■ For Training

If the iQ.Suite CORE function is used in your company, you can use some of the quarantined e-mails as "training material" for an advanced spam recognition using CORE. For details on the training configuration using CORE please refer to the Administration Manual.

3.3.2 Performing Functions for an Open Quarantine E-mail

In the iQ.Suite User Portal, you can open and display individual e-mails from the **Quarantine** sub-category:

15.02.2008 12:23:54	To	<input type="text"/>
	cc	<input type="text"/>
	bcc	<input type="text"/>
Spam	Subject	newsletter

Dear Sir or Madame,

we want to inform you about our new product release.


After the successful launch last month we plan to deliver high-quality pharma for you. See our product list in the attachment.

From the function bar, you can select different functions to be applied to the e-mail, e.g. add the sender of the e-mail to your whitelist after having checked the content.

For a full description of the function bar please refer to ["E-mail Functions in the Quarantine" on page 11](#). The functions available depend on the rights granted and the configuration settings made by your administrator.

3.3.3 Adding the Sender to a Blacklist or Whitelist from the Quarantine

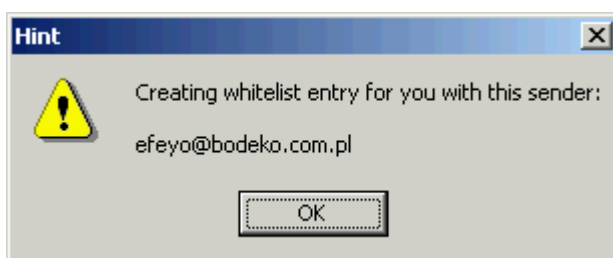
To add the e-mail address of a specific sender to your whitelist or blacklist, you can either select the **Quarantine** category or open the quarantined e-mail ⁵. Once added to a list, the sender is automatically considered dubious (blacklist) or trustworthy (whitelist) and treated accordingly without further spam check. As a rule, e-mails from sender addresses included in a blacklist are never delivered to your mailbox, but immediately quarantined. On the other hand, e-mails from senders included in a whitelist are immediately delivered to your mailbox.

 Please note that the only sender addresses you have to add to a whitelist or blacklist are those that have not been classified correctly for you and for which you need a permanent solution.

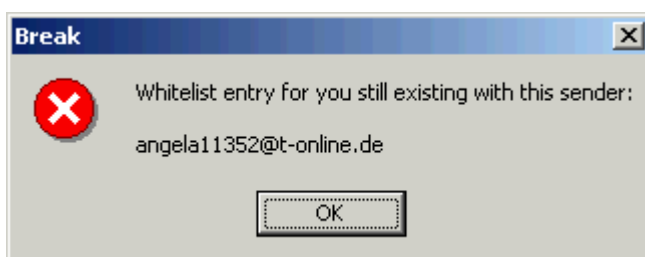
Proceed as follows:


1. Open the quarantined e-mail whose sender address is to be added to a list or select it under the **Quarantine** category.
2. Click **To My Whitelist** or **To My Blacklist**.

After the sender has been added to the list specified, a confirmation message is displayed:



In case the selected sender address has already been entered in your whitelist, the following message is displayed:



 **Attention:** This message does not appear if you have added the entry manually via the **New** function.

5. Refer to ["The Black- and Whitelists Category" on page 15](#)

4 The Black- and Whitelists Category

4.1 What are Blacklists and Whitelists?

Blacklists and whitelists are a functional extension of the quarantine that allows to classify known sender addresses as dubious (blacklist) or trustworthy (whitelist).

Any e-mails classified as "Unsolicited" by iQ.Suite, such as spam, are not delivered to you. Instead, they are stored in a separate area of iQ.Suite, the so-called quarantine. Depending on the company's policies, it is possible that e-mails are classified as "Unsolicited" that you would like to receive, e.g. newsletters. The Blacklist/Whitelist function allows you to avoid regularly checking the quarantine and manually transferring "wrongly classified" e-mails to your mailbox. In other words, you can decide for yourself which e-mails from which senders are to be considered wanted or not.

A **whitelist** is a list of known trustworthy sender addresses such as customers, cooperation partners, etc. You can create this list on your own and thus make sure that e-mails from these senders are never quarantined but automatically delivered to you.

A **blacklist** is the exact opposite; it represents a list of dubious (non-trustworthy) sender addresses. All addresses found in a blacklist are automatically blocked and moved to the quarantine. The e-mail is not delivered to you, the original recipient, but you may receive a quarantine summary notification informing you that a number of e-mails addressed to you have been quarantined.

In most cases, you will be able to access and manage your individual blacklists and whitelists from the iQ.Suite User Portal. This includes changing existing lists or creating new whitelist/blacklist entries⁶. As a general rule, the functions available depend on the configuration settings made by your administrator.



Please note that the only sender addresses you have to add to a whitelist or blacklist are those that have not been classified correctly for you and for which you need a permanent solution.

6. Also refer to ["License Agreement" on page 2](#)

4.2 Functions for Blacklists and Whitelists

iQ.Suite User Portal

iQ.Suite Black-/Whitelist

Whitelists are used to define trustworthy senders, i.e. senders are not checked for spam but delivered immediately.

Blacklists are the exact opposite. Sender addresses found in the Quarantine.

Through the iQ.Suite Portal, each user is able to access and create a new whitelist/blacklist.

Click on a view (**By Category, By Sender**) underneath the view selected.

1. Click on **New** and select the desired entry:

and Activate Deactivate New ▾

The **Black-/Whitelist** category is divided into the subcategories **By Category** and **By sender**, which allows to select different views and sorting options for the lists and the sender addresses included in them. For instance, to view all senders whose e-mails you do not wish to receive (i.e. listed in your blacklist and automatically quarantined), select the subcategory **By Category**.

Click on the desired subcategory under **Black-/Whitelist**. As a typical standard user, the following functions are likely to be available to you:

User Portal

iQ.Suite Black-/Whitelist Help View Print Collapse Expand Activate Deactivate New ▾

List	Sender	Recipient
	info@manufacturer.net	chris ford/iqsuite General/WhiteList
	jamie.may@customer.net	alex.lindberg/iqsuite General/WhiteList
	jamie.may@customer.net	iqsuite.admin/iqsuite General/WhiteList
	marketing@iqsuite.net	alex.lindberg/iqsuite General/WhiteList
	matthias.roeder@group-technologies.com	alex.lindberg/iqsuite General/WhiteList
	mat.buy@customer.net	alex.lindberg/iqsuite General/WhiteList
	trond-are@symfoni.no	alex.lindberg/iqsuite General/WhiteList
▼ SPAM-WL	jamie.may@customer.net	SPAM-WL
▶ Not active		

User's Blacklist
User's Whitelist
Black-/Whitelist

■ iQ.Suite <module name>

Provides information on the database currently selected. Your administrator may have given you access to several databases. You can switch from database to another by clicking on the **Next database** subcategory. As of four configured databases, a **Select database** subcategory is displayed for selection purposes.

■ **Help**

If you need explanations or additional information, click on **Help** to access both the present documentation and the Administration Manual as .pdf files.

■ **Print**

A printer selection window is opened to **print** the current view.

■ **Collapse**

Your list view is reduced to the **Active** and **Not Active** levels. This may be useful for very long lists with many entries.

■ **Expand**

As the opposite of the **Collapse** function, your list view is expanded from the **Active** and **Not Active** levels to all sub-entries.

■ **Activate**

The selected entry (sender address) is set to **Active** and thus enabled. E-mails from this sender will not be checked for spam and will be either immediately delivered to you (whitelist entry) or moved to the quarantine (blacklist entry).

■ **Deactivate**

The selected entry (sender address) is set to **Not Active** and thus disabled. E-mails from this sender will be checked for spam and treated as configured.

Depending on the rights granted, one or more additional functions may be available in the function bar:

■ **New**

This function is used to manually create a new entry for a sender address to be added to

your blacklist (**User's Blacklist Entry**), or

your whitelist (**User's Whitelist Entry**).

For a detailed description please refer to

["Adding a Sender to a Blacklist or Whitelist" on page 18.](#)

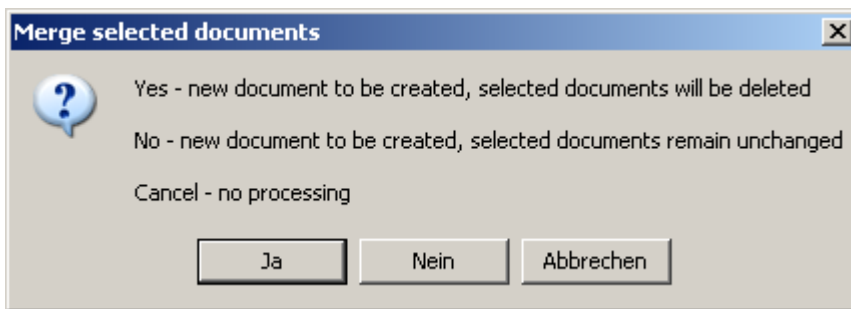
■ **New → Blacklist/Whitelist Entry**

This function is used to manually create a new list category for your sender addresses.

Whether this is a blacklist or whitelist is set through the job definition and the iQ.Suite selection rules (normally set by the administrator).

■ **Merge**

(In **By Sender** sub-category only) Merges selected documents according to the option selected:



4.3 Adding a Sender to a Blacklist or Whitelist

There are several possibilities to add a sender to a blacklist or whitelist. The actions actually available depend on the configuration settings made by your administrator:

1. Add a sender's e-mail address to a list under **Quarantine**, refer to ["Adding the Sender to a Blacklist or Whitelist from the Quarantine" on page 14.](#)
2. Add a sender's e-mail address to a list from an open quarantined e-mail, refer to ["Adding the Sender to a Blacklist or Whitelist from the Quarantine" on page 14.](#)
3. Add a sender's e-mail address to a list from a quarantine summary notification, refer to ["What is the Quarantine Summary Notification?" on page 10.](#)
4. Manually create a new entry, refer to ["Manually Creating a New Blacklist or Whitelist Entry" on page 18.](#)
5. Automatic creation of a new entry, refer to ["Automatically Creating a New Whitelist Entry" on page 19.](#)

4.3.1 Manually Creating a New Blacklist or Whitelist Entry


1. Open the iQ.Suite User Portal⁷ and click on a subcategory under **Black-/Whitelist**.
2. If the function bar displays the **New** function, select **User's Whitelist Entry** or **User's Blacklist Entry**:

7. Refer to ["Opening iQ.Suite User Portal" on page 6](#)


Basics		Comments
Basics		
Black-/Whitelist	Users-BL	
Status	<input type="radio"/> Active <input checked="" type="radio"/> Not active	
Sender type	User ▾	
Sender address	▾	
Recipient address	David Galler/DEV/mycompany	

3. Set the **Status** field to **Active**.
4. In the **Sender type** field, set for which type of sender the entry is to be created:
 - **User**: A single user is added to the blacklist or whitelist. Depending on the list, e-mails from this sender will either directly delivered to you or blocked and moved to your quarantine.
 - **Domain**: Both the sender and the entire domain are added to the blacklist or whitelist. This allows to, for instance, simultaneously add all employees from a cooperation partner to a whitelist.
 - **All**: Depending on whether the entry applies to a whitelist or blacklist, all e-mails will be either delivered to your mailbox or quarantined, regardless of the sender address.
5. Select the **sender address** from the Notes address book. Internet addresses have to be entered in the form "user@domain.com". Multiple addresses have to be separated by a line break.
6. Click **Save**.

The blacklist entry created in this example is automatically sorted into the **Users-BL** blacklist category. This category cannot be changed!

 A whitelist entry is limited to a maximum of 20 sender and recipient addresses as well as 20 wild-cards such as the asterisk (*) within an e-mail address.

4.3.2 Automatically Creating a New Whitelist Entry

 Please note that the automatic creation of whitelist entries requires that this function has been enabled on the server! If in doubt, consult your administrator!

4.3.2.1 Creating a Whitelist Entry When Sending an E-mail

Depending on the configuration, it is possible to have whitelist entries created automatically whenever you write an e-mail to one of your communication partners. As sending the e-mails implies that the recipient's address is a trustworthy e-mail address, it is automatically added to the whitelist. Any future e-mails from this address will no longer be checked for spam but delivered to you immediately.

4.3.2.2 Creating a Whitelist Entry Without Sending an E-mail

If you wish to automatically add the e-mail addresses of a communication partner to the whitelist without sending an e-mail to that address, you can do so by specifying a keyword. The keyword will be provided to you by your administrator. The default keyword is `###TOWHITELIST###`, where the "#" character has to be entered as well.

Write an e-mail to the desired communication partner and enter the keyword in the Subject field. This way, the address of the communication partner will be added to your whitelist without actually sending the e-mail.

4.4 Removing an Address From a Blacklist or Whitelist



Please note that removing an address from a blacklist or whitelist requires appropriate rights to the database! If in doubt consult your administrator!

4.4.1 Removing the Entire Blacklist or Whitelist Entry

1. Open the iQ.Suite User Portal⁸ and select a subcategory under **Black-/Whitelists**.
2. Select the desired whitelist or blacklist entry and press the **Del** key. The entry is marked for deletion.
3. Press **F9** to refresh the view. A confirmation box will appear. Click **OK** to confirm the deletion of the blacklist or whitelist entry.

This procedure will remove the entire entry, regardless of how many senders are included in the entry. Normally, a blacklist/whitelist entry will contain one sender address only.

4.4.2 Removing Individual Sender Addresses From a Blacklist or Whitelist Entry

If an entry contains several addresses and you wish to remove one or several of them from the blacklist or whitelist entry, proceed as follows:

1. Open the iQ.Suite User Portal and select a subcategory under **Black-/Whitelists**.

8. Refer to ["Opening iQ.Suite User Portal" on page 6](#)

2. Open (double-click) the desired whitelist or blacklist entry.
3. Click **Edit** and select the names to be removed:

Basics	Comments
Basics	
Black-/Whitelist	Users-WL
Status	<input type="radio"/> Active <input checked="" type="radio"/> Not active
Sender type	User ▾
Sender address	david.galler@mycompany.com ▾
Recipient address	Admin Admin/LndTestOrg

4. Press the **Del** key and then select **Save** from the function bar. The sender address is removed from the list.

5 The Absence Management Category

5.1 What is Absence Management?

Absence Management is used to forward or redirect e-mails to another or an additional recipient. Whenever you have planned an absence (vacation, business trip, etc.), the absence management functions allows to set how your electronic mail is to be handled during your absence. For instance, it may be useful to have the e-mails forwarded to a deputy to ensure that your mail is taken care of although you are not available personally. In addition, iQ.Suite allows to set different actions for specific e-mails, for instance to forward e-mails from specific senders to another deputy or to disable forwarding altogether for specific e-mails (e.g. confidential information). You can set up notifications and read conformations for senders, recipients and deputies, for instance to inform the sender that his e-mail has been forwarded to a deputy.

Besides temporarily forwarding e-mails, Absence Management also allows to set up a permanent redirection of e-mails from specific senders to another person.



Please note that you may not have access to all of the functions. The functions available depend on the configuration. Please contact your administrator for assistance.

5.1.1 What is a Forwarding?

Typically, forwarding e-mails is set up for a period of foreseeable absence (vacation, business trip, etc.). To this end, in the iQ.Suite User Portal, you need to define a deputy who is to receive the e-mails originally addressed to you while you are absent. Forwarding your e-mails is automatically started on the first day of your absence. All e-mails addressed to you will be delivered to you (as usual), with a copy of the e-mail delivered to your deputy. Where required, the sender of the e-mail can be informed that you are absent and that his e-mail has been forwarded to your appointed deputy. The copy sent to the deputy can also include a notification, e.g. instructions to process the e-mail.

Typically, "standard users" have the right to create a **standard forwarding** document with the following configuration options:

- Set one or more deputies.
- Define of the absence period.
- Notify the e-mail sender of your absence and the appointed deputy.
- Notify the deputy that the e-mail was forwarded.

- Define individual text for notifications to e-mail senders.
- Define individual text for notifications to deputies.
- Give the deputy or deputies access permission to the quarantine.
- As an alternative to actually forwarding the e-mail to a deputy, only inform the sender of your absence, e.g. in case of confidential information.

The configuration options actually available for e-mail forwarding depend on the permissions granted.

For a detailed description of the configuration options please refer to [“Setting up Deputies for Holiday and Sickness Leaves” on page 28.](#)



If you have already created an absence document to set forwarding options, you can always re-use the same document and simply change the period of absence. The document can always remain active, as the actions are only performed during the absence period defined.

To handle unplanned absences (e.g. due to sickness), it may be useful to grant extended rights to specific persons so they can set up forwarding for the absent person. In this case, you can use the **advanced forwarding** options which, unlike **standard forwarding**, allow to view and configure the absence management documents for other persons. Advanced forwarding includes the following configuration options:

- Define forwarding jobs for other persons.
- Define forwarding/deputy exceptions for specific e-mail senders.
- Set content-based forwarding options.
- Set special rules for specific contents or specific e-mail addresses.

The options mentioned here are described in more detail further down.

5.1.2 What is a Redirection?

Typically, e-mail is redirected during an unlimited period of absence and/or to handle very high e-mail traffic, for instance to have a secretary check the e-mails before they are processed or forwarded to appropriate recipients. When an e-mail originally addressed to you is redirected, it is sent to another person and delivered to that person’s mailbox. Neither you nor the sender are informed of redirection.

E-mail redirection is set in the iQ.Suite User Portal and automatically started when the redirection job is enabled (set to Active in the redirection document). To disable a redirection, simply **deactivate** the redirection document.

Typically, "standard users" do not have the right to create a **redirection** document. However, if you do have the necessary rights, the following configuration options will be available:

- Define the recipient of the redirected e-mail.
- Give the recipient of the redirected e-mail access permission to the quarantine.
- Define individual text for notifications to the recipient of the redirected e-mail .
- Set special rules for specific contents or specific e-mail addresses.

For a detailed description of the configuration options please refer to [“Setting up a Redirection” on page 33.](#)

5.2 Absence Management Functions

The screenshot shows the iQ Suite User Portal interface. On the left is a navigation menu with two main sections: **Absence Management** and **Quarantine**. Under **Absence Management**, there are subcategories: **By User**, **By Date**, and **Clerk Protocols**. Under **Quarantine**, there are subcategories: **Today**, **This Week**, **Up to Last Week**, **By Date**, **By Sender**, **By Recipient**, **Next Quarantine**, **Select Quarantine**, and **Substitute for Quarantine Access**. The main content area displays a table with the following data:

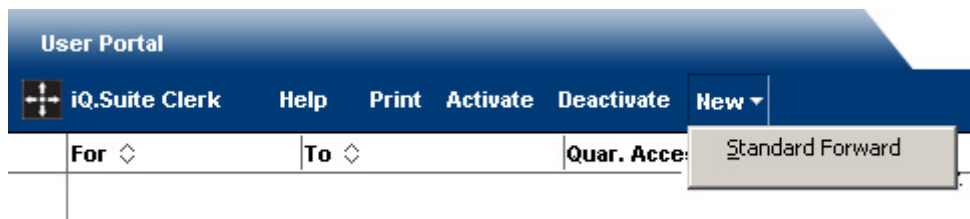
Period	Status	For
----	Active	David Galler
----	Not active	Robert Fontane
----	Not active	Elena Martin
----	Not active	Anna Glenn
----	Not active	Julie Bonet



The **Absence Management** category is divided into several subcategories (e.g. **By User**), which allows to select different views and sorting options for your forwarding or redirection documents.

Select the desired subcategory under **Absence Management**. The screen displays all forwarding or redirection documents for which you have appropriate access rights. As a "Standard User", these will be all documents created by yourself or where you have been specified as deputy. Double-click a document to open and edit it.

As a typical standard user, the following functions are likely to be available to you:



■ **iQ.Suite <module name>**

Provides information on the database currently selected. Your administrator may have given you access to several databases. You can switch from database to another by clicking on the **Next database** subcategory. As of four configured databases, a **Select database** subcategory is displayed for selection purposes.

■ **Help**

If you need explanations or additional information, click on **Help** to access both the present documentation and the Administration Manual as .pdf files.

■ **Print**

A printer selection window is opened to **print** the current view.

■ **Activate**

The selected entry is enabled (set to **Active**). Your e-mails will be forwarded or redirected for the period of absence specified.

■ **Deactivate**

The selected entry (sender address) is disabled (set to **Not Active**). Your e-mails will no longer be forwarded or redirected, regardless of whether the period of absence specified lies in the past or in the future.

■ **New → Standard Forward**

This function is used to create a new forwarding document in standard mode.

If you are not registered as Standard User or if you have extended privileges, you will be able to view all forwarding and redirection documents from other persons. In this case, the following functions will also be available in the function bar:

■ **New → Advanced Forward**

This function is used to create a new forwarding document in advanced mode.

■ **New → Redirect**

This function is used to create a new redirection document.

The description in the sections below is based on the functionality of the Notes client. The differences in the functionality using a web browser are mainly limited to the display (dialog boxes, tabs, etc.), while the use is more or less identical. Nonetheless, you will find a separate chapter on Absence Management using a web browser under [“The Absence Management Category” on page 48](#).



Please note that you may not have access to all of the functions. The functions available depend on the configuration. Please contact your administrator for assistance.

5.3 Setting up Deputies for Holiday and Sickness Leaves

This section describes how to:

- Forward your own e-mails to one or more deputies in case of absence (**New → Standard Forward**).
- Forward someone else’s e-mails to one or more deputies in case of absence (**New → Advanced Forward**).
- Configure forwarding notifications for deputies.
- Hide the original message for deputies in case of forwarding.
- Configure sender notifications.
- Forward e-mails from specific senders to selected persons.
- Notify sender without forwarding to deputy.
- Do not notify sender though e-mail is forwarded.
- Forward e-mails with specific words in subject, body or field names, or exclude them from forwarding.
- Configure exception rules for senders and contents (e.g. private e-mails).
- Set up a quarantine deputy.

5.3.1 Setting up Standard Forwarding

To set up forwarding for a specific period of absence proceed as follows:

1. Open the iQ.Suite User Portal⁹.
2. If the function bar displays the **New → Standard Forward** function, create a new forwarding document:

9. Refer to [“Opening iQ.Suite User Portal” on page 6](#)

Basics	Operations	Misc.	Comments
Basics			
Status	<input checked="" type="radio"/> Active <input type="radio"/> Not active		
Absence profile for	David Galler/DEV/mycompany		
Start at	04.05.2009	16	
Up to and including	06.05.2009	16	
Forward e-mails	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
Forward to	Anna Glenn/DEV/mycompany		
Use for Quarantine Access	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
Sender notification mode	<input checked="" type="checkbox"/> Always notify <input type="checkbox"/> Never		

- **Status:** Set the document to **Active** to ensure that the e-mails will be forwarded when the specified period of absence begins. If set to **Not Active**, the e-mails will not be forwarded.
- **Absence profile for:** By default, this is preset to your own profile. With appropriate rights, you may also select another person from the Notes address book.
- **Start at / Up to and including:** Set the period of your absence. During this period of time, all e-mails addressed to you will be forwarded to the deputy specified.
- **Forward e-mails:** If you want all e-mails addressed to you to be forwarded select **Yes**. If set to **No** and **No - notify sender only**, the e-mails will not be forwarded to a deputy¹⁰.
- **Forward to:** Enter the desired deputy. With appropriate rights, you may also select the names from the Notes address book.
- **Use for Quarantine Access:** If set to **Yes**, the deputy will not only receive all of the e-mails delivered to your mailbox, but he will also have access to the e-mails moved to your quarantine¹¹. In this case, your deputy will be provided with a separate quarantine area in his own iQ.Suite User Portal in order to have access to your quarantine e-mails (**Quarantine → Quarantine access for deputy**).
- **Sender notification mode:** If you wish to inform the e-mail senders of your absence select **Always**. The sender will be sent an e-mail that informs him of your absence. If you do not want the e-mail sender to be notified, select **Never**.

3. Open the **Operations** tab:

10. For a detailed description of these options please refer to ["Forwarding E-mails From Specific Senders to Selected Persons" on page 32](#) and ["Notify Sender Without Forwarding to Deputy" on page 29](#).

11. Refer to ["What is the Quarantine?" on page 9](#).

Clerk Standard Forward

Basics	Operations	Misc.	Comments
Operations			
Message for forwarding recipient			
Subject	☞ %SUBJECT% ☞		
Text	☞ I am out of office up to and including %FINAL-DATE%. Please deal with my i		
Replace original body	<input type="radio"/> Yes <input checked="" type="radio"/> No		
Message for sender in case of forward			
Subject	☞ Autoreply: %SUBJECT% ☞		
Text	☞ I am out of office up to and including %FINAL-DATE%, but your e-mail will b		
Message for sender in case of non-forward			
Subject	☞ Autoreply: %SUBJECT% ☞		
Text	☞ I am out of office up to and including %FINAL-DATE%. Your e-mail will be h		

- **Message for forwarding recipient:** Where required, change the subject and the text of the message to be sent to your deputy. Under **Subject**, you can use the "%SUBJECT%" variable. Under **Text**, you can use the "%START-DATE%" and "%FINAL-DATE%" variables. When the e-mail is forwarded, these variables will be replaced with the subject of the e-mail or the start / end dates of your absence.
- Leave the **Replace original body** option set to **No**. This option should only be set to **Yes** if you do not wish your deputy to be able to read the e-mail body text. In this case, the actual message is hidden and the deputy receives nothing but the subject and the specified notification message. However, keep in mind that your deputy will be virtually unable to answer any of the e-mails if he does know their contents.
If, in turn, your deputy has set up a forwarding (to another person) but has **not enabled** this option, this person will receive the e-mail with both texts, i.e. with the original message and with the forwarding message defined above!
- **Message for sender in case of forward:** Enter the text and the subject of the notification to be sent to the sender of the forwarded e-mail. The sender notification is sent as separate e-mail.
- **Message for sender in case of non-forward:** If, in the **Basics** tab, you have set the **Forward e-mail** field to **No**, use this field here to specify the message for the e-mail senders.



If you have already created an absence document to set forwarding options, you can always re-use the same document for each planned absence and simply change the period of absence. The document can always remain active, as the actions are only performed during the absence period defined. The placeholder %FINAL-DATE% automatically inserts the end date you have set. The placeholder %DEPUTY% is replaced with the recipient of the forwarding. If several persons

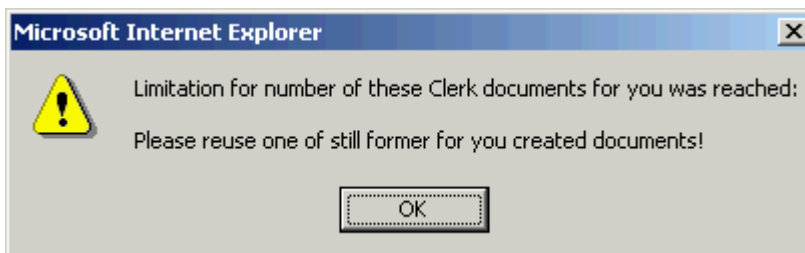
are specified, they have to be separated by comma. As a general rule, always enter the e-mail address of your deputy as Internet address, e.g. "user@company.com". Otherwise the sender will receive an address he will be unable to send a message to!

4. Open the **Misc.** tab.
 - **Document authors:** Provided you have appropriate rights, you can use this field to grant read rights to your deputy or any other person for the forwarding document created here. With appropriate rights, you can select the desired senders from the Notes address book.
 - **Runs on server:** The asterisk (*) in this field means that the document applies to all servers. With appropriate rights, you can select another server. However, do not change this entry without having consulted your administrator!
5. **Save and close** the forwarding document (in the upper function bar).

Please note that you need to have defined the deputy and set any applicable exceptions before granting quarantine access to the deputy, refer to

["Setting up Deputies for Holiday and Sickness Leaves" on page 28.](#)

If the following message appears, the maximum number of Clerk documents has been reached. The present document cannot be created. Use an existing document instead and change the settings as required.



5.3.2 Notify Sender Without Forwarding to Deputy

If you do not wish to forward e-mails to a deputy but inform the senders of your absence, proceed as described under ["Setting up Standard Forwarding" on page 26.](#)

In the last step change the following settings:

1. In the **Basics** tab, enable the **No - notify sender only** option in the **Forward e-mails** field.
2. Set the **Notify sender** field to **Always**.
3. Write a text for the sender specified in the **Message for sender in case of non-forward** field under the **Operations** tab. The **Replace original body** option must be set to **No**.

5.3.3 Setting up (Advanced) Forwarding for E-mails With Specific Contents

For e-mails from specific senders or e-mails with specific contents such as confidential information, you can define **exceptions** to the forwarding and notification settings. However, this option is only available if you have the permission to edit advanced forwarding documents (category **Absence Management** → **New** → **Advanced Forward**).

Setting up an advanced forwarding document is largely identical to the procedure for a **standard forwarding** document, refer to [on page 26](#).

Additional settings are available under the **Advanced** tab.




Use the **Checking mode** field to set whether you want to check

- the sender address of the incoming e-mail only (**Check sender only**) or
- the content of the e-mail as well (**Check sender and content**).

Requirements: You have already specified a deputy under the **Basics** tab and set whether or not notifications are to be sent to the e-mail senders. Now use the **Advanced** tab to set the **exceptions**, i.e. the sender addresses to be excluded from these settings:

Check sender only

Clerk Advanced Forward

Basics		Operations		Advanced		Misc.		Comments	
Advanced									
Exceptions									
Checking mode				<input checked="" type="radio"/> Check sender only			<input type="radio"/> Check sender and content		
Controls for Exceptions									
Sender				Forward to					
iQSuite Admin/mycompany				Archiv Admin/mycompany					
Robert Fontane/mycompany				[Do not forward - notify sender]					

1. Set the **Checking mode** field to **Check sender only**. This option allows to define exceptions for e-mails from specific senders. For instance, you can set that e-mails from a specific sender are to be forwarded to another deputy than the one specified under the **Basics** tab. Also, you can set that e-mails from specific senders are not to be forwarded at all and that they are not to be informed of your absence (e.g. for subscribed newsletters).
2. Under **Controls for Exceptions** click **New** and enter the exceptions. In the example above, these are exceptions for the senders "iQSuite Admin" and "Luigi Corda". During the period of absence, all e-mails from these senders will not be forwarded to the regular deputy ("Jamie May", refer to the example under **Standard Forward** → **Basics** tab), but to "Archiv Admin". On the other hand, e-mails from Luigi Corda are not forwarded at all, but the sender is

formed of the absence of the original recipient (e.g. if messages from Luigi Corda are considered confidential and therefore exclusively delivered to the original recipient). If you also wish to set that subscribed newsletters are not to be forwarded and their senders not to be notified, select the **Do not forward - do not notify sender** option and enter the sender's Internet address:

The following placeholders can be used to specify character strings:

- ▷ asterisk (*) = any character string. Examples: *hou** finds *house* or *housekeeper*, **hou** also finds *household*, *summerhouse* or *shout*.
- ▷ question mark (?) = any single character. Example: *ho?se* for instance finds *house*, *horse* or *ho3se*.
- ▷ backslash exclamation mark (\!) = any single letter. Example: *be!t* for instance finds *belt*, *best* or *bent*.
- ▷ backslash number sign (\#) = any digit. Example: *Ha!#s* for instance finds *Ha1s*, *Ha3s* or *Ha9s*.

3. **Save and close** the forwarding document in the upper function bar. Check that the document is set to **Active**.

Check sender and content

1. Set the **Checking mode** field to **Check sender and content**. This option allows to define exceptions for e-mails from specific senders or with specific contents. For instance, you can exclude an e-mail from forwarding or have it forwarded to another deputy (other than the one specified in the **Basics** tab) if the e-mail has specific contents in the subject or the e-mail body.
2. Under **Controls for Exceptions** click **New**.
To define exceptions for e-mails with specific contents, e.g. confidential information, you can search for specific words in the message text. To this end, set the **Field for content** option to **Body** and enter the words to be searched for. If the **New Keyword** field is available,

you also have the permission to search for specific words in field names. This option corresponds to the or **Manual** selection field in the web browser.



The following setting allows to define exceptions for e-mails that contain the word "private" in the subject field. These e-mails will not be forwarded to your deputy, but the senders will receive a notification of your absence. Please note that this setting specifically applies to e-mails that contain the word "private" in the subject field!



Checking the sender and the content can be freely combined. If, for a specific entry, you wish to check the sender but not the content, you can disable content checking for that entry by setting the **Field for content** to **[No content checking]**. You can use placeholders to enter sender addresses, also refer to the section on placeholders [on page 31](#).

3. Click **Edit** to change entries. The **Sort** icon allows to change the order of the entries. The entries in the list are processed from top to bottom.

5.3.4 Forwarding E-mails From Specific Senders to Selected Persons

If you wish to forward the e-mails from specific senders to selected persons or groups, proceed as described above under

["Setting up Standard Forwarding" on page 26](#).

Then, in the last step, change the following settings:

1. In the **Basics** tab, set the **Forward e-mails** field to **No**.
This hides some of the remaining options. Forwarding is prevented and only the **Exceptions** defined under the **Advanced** tab are executed, refer to ["Setting up a Redirection" on page 33](#).

2. Save the document with **Save**.



Please note that, in this case, the Quarantine substitute needs to be set up separately. To grant Quarantine access to deputies, proceed as described under [“Setting up Quarantine Access for Deputies” on page 35](#).

5.4 Setting up a Redirection

To set up a permanent e-mail redirection proceed as follows:

1. Open the iQ.Suite User Portal¹²
2. If the function bar displays the function **New → Redirection**, create a new redirection document:

Basics	Operations	Advanced	Misc.	Comments
Basics				
Status	<input type="radio"/> Active <input checked="" type="radio"/> Not active			
Redirection for	David Galler/mycompany			
Redirect e-mails	Yes			
Redirect to	Anna Glenn/mycompany			
Use for Quarantine Access	No			

- **Status:** Set the document to **Active** to ensure that the e-mail redirection is started when the specified period of absence begins. If set to **Not Active**, no e-mails will be redirected.
- **Redirect e-mails:** Set this option to **Yes** if you want to have all e-mails addressed to you redirected, except for those specified under the **Advanced** tab. Select **No** if none of your e-mails are to be redirected, again except for those specified under the **Advanced** tab. Select the appropriate option according to the e-mail traffic concerned.
- **Redirect to:** depending on the permissions granted, your deputy is either pre-set or you can select the desired name from the Notes address book.
- **Use for Quarantine access:** If set to **Yes**, your deputy will not only receive all of the e-mails addressed to your mailbox, but he will also have access to your quarantined e-mails. In this case, your deputy will be provided with a separate quarantine area for your your quarantine e-mails in his own iQ.Suite User Portal (**Quarantine → Quarantine access for deputy**).




3. Open the **Operations** tab:

12. Refer to [“Opening iQ.Suite User Portal” on page 6](#)

A notification for the deputy is inserted in the redirected e-mail. This notification is to remind of him of the permanent redirection and may, for instance, include instructions on how to handle important e-mails. Enter a subject text under **Redirection subject** and an appropriate message under **Redirection message**. Each new redirection document contains the preset default text.

4. Open the **Advanced** tab and enter any **exceptions** for specific senders and/or contents:

Clerk Redirection

Advanced	
Exceptions	
Checking mode	<input checked="" type="radio"/> Check sender only <input type="radio"/> Check sender and content
Controls for Exceptions	
  	
Sender	Redirect to
iQSuite Admin/mycompany	Archiv Ad
Anna Glenn/mycompany	[Do not forward]

Use the **Checking mode** field to set whether you want to check the sender address of the incoming e-mail only or the content of the e-mail as well.

Refer to the description for forwarding documents [on page 30](#).

In the example shown, checking the sender is set for the senders "iQSuite Admin" and "Jamie May". Under the **Basics** tab, "Jamie May" has been defined as your redirection recipient. To ensure that e-mails sent by "Jamie May" are not redirected to himself, the exception **Do not forward** has been enabled for this sender. As to the sender "iQSuite Admin", his e-mails are redirected to the administrator "Archiv Admin".

5. Click **New** and enter the settings for each sender for whom you wish to define an exception:

Edit Entry ✕

Redirection to
 Do not forward

Working mode

Sender

Redirection to

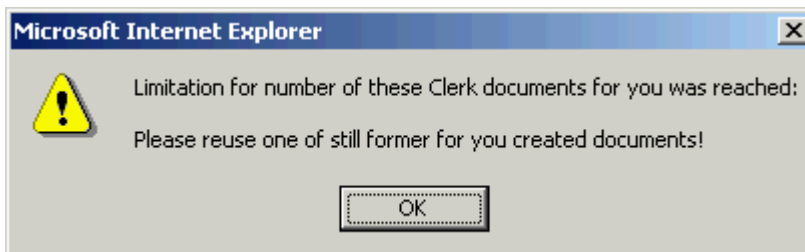
Delete list entry? Yes



For redirections, the **Working mode** is limited to the options **Redirection to** and **Do not forward**. An option "Do not redirect - notify sender", as for advanced forwarding, is not available.

6. Open the **Misc.** tab. If required, you can use the **Document authors** field to set who is to be authorized to edit and maintain this redirection document¹³. As in the **Basics** tab, select the desired persons from the Notes address book. The asterisk (*) in the **Server** field means that the document applies to all servers. Do not change this entry without having consulted your administrator!
7. Finally, click on **Save** in the function bar to save all of the document's settings.

If the following message appears, the maximum number of Clerk documents has been reached. The present document cannot be created. Use an existing document instead and change the settings as required.



5.5 Setting up Quarantine Access for Deputies

As a general rule, deputies can only edit the e-mails that are delivered to their mailbox (forwarding) or would be so (redirection). E-mails classified as "unsolicited" and therefore moved to the quarantine¹⁴ can neither be viewed nor processed. Provided you have appropriate rights, you can set up access to your quarantine e-mails for your deputies. This requires that both you and your deputy have access to the **Quarantine** category in the iQ.Suite User Portal. Please note that this, in turn, requires that the administrator has enabled the function **Clerk quarantine documents access** (under **User specific quarantine access**) in the job!

This section describes how to give one or more deputies access to the following:

- In case of **redirection**, access to the quarantine of one or more users (with appropriate rights!).
- In case of **forwarding**, access to the quarantine of one or more users (with appropriate rights!).
- In case of **redirection/forwarding**, access to the quarantine of one or more users (with appropriate rights!) directly from the **summary notification**.

13. If you need assistance on rights, please contact your administrator.

14. Refer to "[The Quarantine Category](#)" on page 9

If you periodically receive a quarantine summary notification¹⁵ to inform you of spam, this notification will also be forwarded to your deputy¹⁶. This requires that, in the redirection/forwarding document, you have enabled the **Use for Quarantine access** field under the **Basics** tab.

If you wish to provide the deputy with access to quarantined e-mails (whether forwarded or redirected), proceed as follows:

1. Under the **Quarantine** category select **Quarantine access for deputy**.
2. In the function bar, click **New** and select **Quarantine access for deputy (Standard)** or **Quarantine access for deputy (Advanced)**. If you do not have the necessary privileges for the advanced document, open the standard document.
3. In the **Basics** tab, enter the following settings:

Basics	Misc.	Comment
Basics		
Status	<input checked="" type="radio"/> Active	<input type="radio"/> Not active
Mode	<input type="radio"/> Redirection	<input checked="" type="radio"/> Forward
Access for	David Galler/mycompany ▾	
Access to	Anna Glenn/mycompany ▾	

- Set the **Status** to **Active**.
- Use the **Mode** field to set whether the quarantine access right is to apply to forwarded or redirected e-mails. If set to **Redirection**, only your deputy will have access to your e-mails moved to the quarantine. If set to **Forward**, access rights remain with you and your deputy will additionally have access to your quarantined e-mails while you are absent.
- In the **Access for** field, enter the user whose quarantine may be viewed by a deputy. Select the user from the Notes address book.



In the standard document, the user whose quarantine is to be made accessible is predetermined (through the login) and cannot be changed.

- In the **Access to** field, enter desired deputy for your quarantine documents. Select the deputy from the Notes address book.

15. Refer to ["What is the Quarantine Summary Notification?" on page 10](#)

16. Refer to ["Setting up Standard Forwarding" on page 26](#)

4. Under the **Misc.** tab, you can specify additional document authors, i.e. persons who are authorized to modify the document.
5. Finally, click on **Save** in the function bar to save all of the document's settings.

If your administrator has enabled this function, your deputy will now have the permission to access your quarantined e-mails from the summary notification and to view your quarantine documents in the iQ.Suite User Portal (**Quarantine** menu).

6 The Trailer Category

6.1 What are Trailers?

Trailers are pieces of text that are automatically appended to all of your outgoing e-mails. This allows to systematically attach salutations and address information as well as more complex information such as legal notices, disclaimers, security notices, waivers, etc. to all outbound e-mails.

You can create and append specific trailers for each applicable scenario. You can also set whether a trailer is to be valid permanently or for a limited period of time only (e.g. a disclaimer for a limited promotional campaign).

Trailers can be created in different languages and made available to specific persons or groups. For instance, English trailers can be appended to e-mails addressed to an international communication partner while a special trailer is used for specific recipients. The location of the trailer place where it is inserted) is set by the administrator. As a general rule, trailers can be placed at the beginning, at the end or anywhere in the middle of the e-mail body.

Depending on the purpose, different **trailer types** are available, e.g. 'Personalized Trailer' for salutations or address information or 'Legal Disclaimer' for legal notices. The applicable trailer type as well as the trailer text is specified in so-called **Trailer documents**. Creating and editing the Trailer documents can be performed most conveniently in the User Portal or via web access. Normally, you will be able to use and manage existing (preconfigured) trailer documents, for instance to adjust the period of validity or change the actual text¹⁷. However, as a general rule, the functions available to you depend on the rights granted and the configuration settings made by your administrator.



Each trailer to be appended to an e-mail needs to be enabled by your administrator. Thus, if you wish to use a specific trailer for e-mails addressed to specific recipients only, please consult your administrator.

17. Also refer to ["License Agreement" on page 2](#)

6.1.1 Which Trailer Type for Which Scenario?

Depending on the configuration settings made by your administrator, you will be able to select or create all or only specific trailer types:

■ Legal Disclaimer

The 'Legal Disclaimer' is used to attach a legal notice to the e-mail. Typically, this type of trailer is used on an unlimited basis and for all e-mails sent by a company's employees. Normally, no distinction is made between in-house and external e-mails. This trailer type is usually appended at the end of the e-mail.

■ Department Disclaimer

Typically, the 'Department Disclaimer' is a complement to the 'Legal Disclaimers' and it is used to append an additional or different disclaimer to the e-mails from specific departments. Normally, this trailer is appended to external e-mails only, i.e. not to e-mails addressed to in-house colleagues. This trailer type is usually appended at the beginning or the end of the e-mail.

■ Personalized Trailer

A 'Personalized Trailer' is often used to attach a salutation and/or sender information such as the address, telephone number, etc. This reduces the time needed as well as the risk of typing errors, as the information is automatically retrieved and inserted. Typically, this type of trailer is used on an unlimited basis and for all e-mails sent by a company's employees. Again, no distinction is normally made between in-house and external e-mails. This trailer type is usually appended at the end of the e-mail, right after the actual message.

■ Marketing Trailer

The 'Marketing Trailer' is often used by Marketing departments in order to inform the recipients of special events or specific advertisements. As a general rule however, this type can be used for all trailers that are not legal disclaimers or do not contain a salutation or contact information. Marketing trailers are often language-specific, valid for a limited of period of time only and normally appended to external e-mails only. This trailer type is often integrated in the e-mail body text by way of a keyword.

Using a keyword, trailers can be placed anywhere within the e-mail, refer to ["Sending an E-mail With a Trailer" on page 45](#).

For a detailed description on how to create trailers refer to ["Integrating Trailers in E-mails" on page 42](#).

6.2 Trailer Functions

The screenshot shows the iQ.Suite User Portal interface. On the left, there is a navigation menu with 'Trailer' selected, and sub-options for 'By Category' and 'Next Trailer Database'. The main content area displays a table of trailer types under the 'Active' filter. The table has columns for 'Type Name' and 'Language Date from Date to'. The entries are:

Type Name	Language Date from Date to
Department disclaimer	
SAMPLE - Department Disclaimer	
Legal disclaimer	
SAMPLE - Legal Disclaimer	
Marketing trailer	
SAMPLE - Marketing Trailer	11/01/2006 01/31/2007
Personalized	
SAMPLE - Personalized Trailer	

Under **Trailer** select the subcategory **By category**. Normally, a separate trailer document is available for each trailer type. This document can be modified as required, for instance to change an attached advertisement message. Double-click the desired document to open and change it as required. Click **Activate** to enable a trailer document and have the specified trailer text appended to the e-mails.



Each trailer to be appended to an e-mail needs to be enabled by your administrator. Thus, if you wish to use a specific trailer for e-mails addressed to specific recipients only, please consult your administrator.

As a typical standard user, the following functions are likely to be available to you:

- **iQ.Suite <module name>**

Provides information on the database currently selected. Your administrator may have given you access to several databases. You can switch from database to another by clicking on the **Next database** subcategory. As of four configured databases, a **Select database** subcategory is displayed for selection purposes.

- **Help**

If you need explanations or additional information, click on **Help** to access both the present documentation and the Administration Manual as .pdf files.

- **Print**

A printer selection window is opened to **print** the current view.

- **Collapse**

As the opposite of the **Expand** function, your list view is reduced to the **Active** and **Not Active** levels. This may be useful for very long lists with many entries.

- **Expand**

The list view is expanded from the **Active** and **Not Active** levels to all sub-entries.

- **Activate**

The selected trailer document is set to **Active** and thus enabled. The trailer text specified in the trailer document will be integrated in your e-mails. This requires that your administrator has enabled the trailer document created by you.

■ **Deactivate**

The selected trailer document is set to **Not Active** and thus disabled. The trailer text specified in the trailer document will not be appended to your e-mails. The trailer document can be activated again any time.

Depending on the rights granted, one or more additional functions may be available in the function bar:

■ **New → Trailer document**

This function allows to create a new trailer document. Within the document, you can select the trailer type and enter the desired trailer text. However, before creating a new trailer document, be sure to check that no existing trailer document can be changed. Only use this option if you want to create a new Trailer type.

■ **Export → Selected Configuration To File**

This function allows to export and save specific trailer documents at another storage location, e.g. in the file system. To this end, select the applicable trailer documents and run the export.

■ **Configuration**

(right-hand pane) To be able to create multilingual trailers, the language selection function must be made available within the trailer document. This language selection is set in a separate document for language configuration. Use this document to set the desired languages that are to be subsequently available for selection within the trailer documents.

The following sections refer to the functionality provided in the Notes client. Although differences in the web browser are primarily limited to display options (dialog windows, tabs, etc.), with operation largely identical, a separate chapter on setting up trailers using a web browser is also available, refer to [“The Trailer Category” on page 58](#).

6.3 Integrating Trailers in E-mails

6.3.1 Adjusting an Existing Trailer Document

Normally, the software will include a preconfigured trailer document that you can open and adjust as required, e.g. to change the advertisement message of a trailer. If several trailer documents are available, these will normally be different trailer types, such as, for instance:

1. a "salutation" trailer document of the **Personalized Trailer** type, and
2. a "Disclaimer" trailer document of the **Legal Disclaimer** type.


To change the trailer text open (double-click) the desired trailer document. For information on trailer types refer to

["Which Trailer Type for Which Scenario?" on page 39.](#)

'SAMPLE - Marketing Trailer'

Trailer Trailer document

Basics	
Name	☐ SAMPLE - Marketing Trailer ☐
Description	☐ Sample for marketing trailer ☐
Status	<input checked="" type="radio"/> Active <input type="radio"/> Not active
Language dependent	<input checked="" type="radio"/> No <input type="radio"/> Yes
Trailer type	☐ Marketing trailer ☐
Timed	<input type="radio"/> No <input checked="" type="radio"/> Yes
Trailer valid from	22.02.2008 16 to 17.03.2008 16
Trailer text	☐ ***** MARKETING TEXT ***** ☐

1. Click **Edit**.
2. The **Name** field displays the name of the trailer document. You may be able to change this setting.
3. **Status**: Set the trailer document to **Active** to ensure that the trailer text specified in this document is appended to your e-mails. This requires that your administrator has enabled the trailer document.
4. **Language-dependent**: To append trailers in different languages, set this option to **Yes**. Then click on the  icon next to the **Language** field (only visible if set to **Yes**) and select the desired language. If the desired language is not included in the list, you need to adjust the language configuration. Typically, this function will not be available to you (function bar → **Configuration**).

Where required, please consult your administrator.

For a description of the language configuration please refer to

[“Changing the Language Configuration” on page 44.](#)

5. **Trailer type:** Do not change the preconfigured trailer type for the trailer document. If you plan to create a new trailer document, use this field to select the trailer type.

For information on trailer types refer to

[“Which Trailer Type for Which Scenario?” on page 39.](#)


6. **Timed:** If the validity of a trailer is to be limited to a specific period of time, set this field to **Yes** and enter the validity dates under **Trailer valid from**.
7. **Trailer Text:** Enter the actual trailer text that is to be integrated in the e-mails.

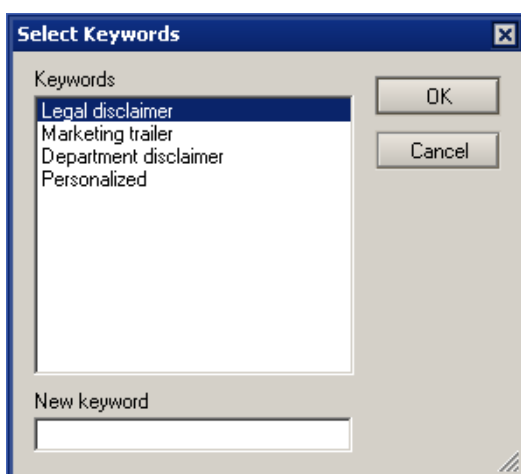


If you wish to change the trailer text of a **Personalized Trailer**, e.g. to specify another salutation at the end of the e-mail message, please change the **Trailer Text** field only. The default settings in the other fields ensure that all address information is correct as it is automatically retrieved from the Notes databases. If you wish other or additional settings please consult your administrator for assistance. For additional information on the content of each field, place the cursor in the corresponding field and click **Help**.

6.3.2 Creating a New Trailer Document

Provided you have appropriate rights, you can create new trailer documents by selecting **New → Trailer document**. However, be sure to use this function only if no existing trailer document can be adjusted to your requirements. Typically, this function is used for trailers of a new trailer type.

1. In the function bar select **New → Trailer document**.
2. Give a **name** to the trailer document and click on the .button next to **Trailer type**.



3. Under **New keyword** enter a name for the new trailer type and click **OK**. The new trailer type can later be selected from the list.

All other settings are the same as described under [“Adjusting an Existing Trailer Document” on page 42](#)

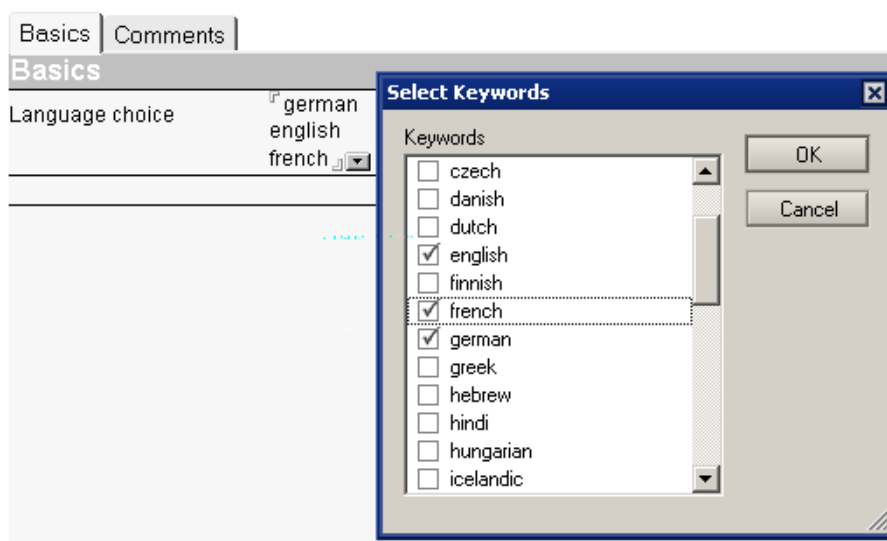
6.3.3 Changing the Language Configuration

If dealing with international communication partners, it may be useful to append the trailer in the corresponding language. Each language requires a separate trailer document that contains the text in the corresponding language. Depending on the configuration settings made by your administrator, you may have access to several trailer documents in different languages which only need to be adjusted to your requirements. You may also have the right required to create new trailer documents (function bar → **New** → **Trailer document**) and select the desired language from there.

If the desired language is not available, this setting has to be adjusted in a separate document for language configuration. If you have the privileges needed for adjusting this language configuration document, proceed as follows:

1. In the function bar select **Configuration** (right-hand side).
2. Next to **Language choice** click on the ▾ button and select the desired languages.

Trailer Language configuration



After having saved the document, the languages set here can be selected in all trailer documents.

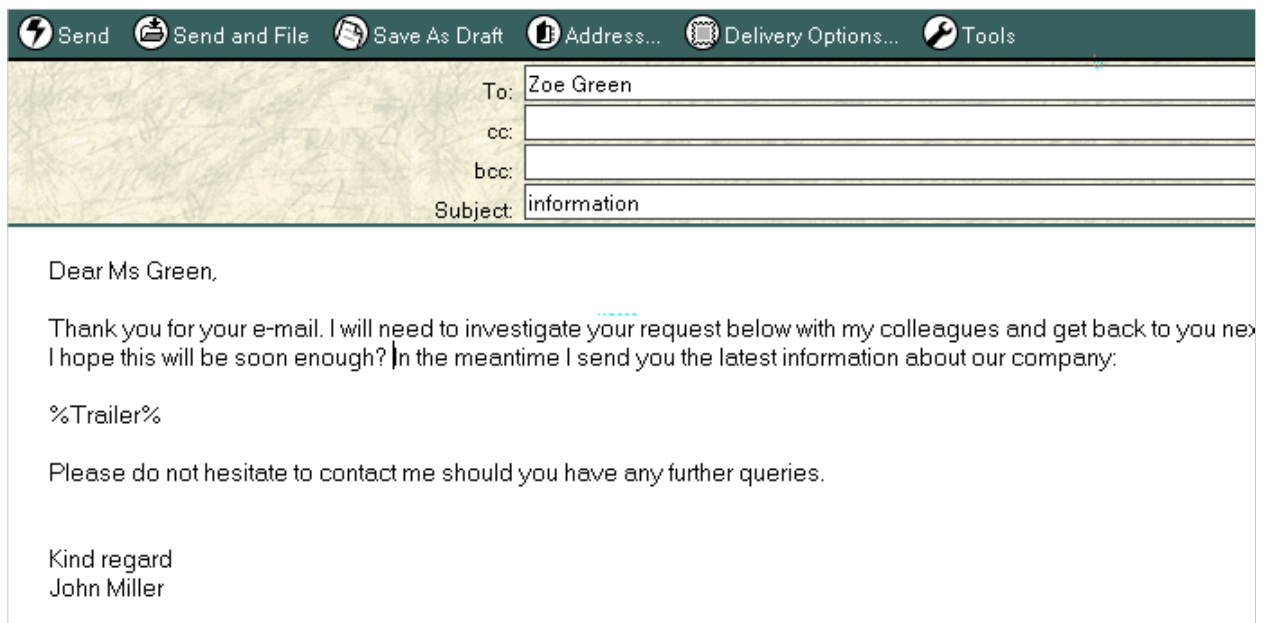


Normally, the function described here will not be available to you (function bar → **Configuration**). Please consult your administrator for assistance.

6.4 Sending an E-mail With a Trailer

To send an e-mail with a trailer, create a new e-mail as usual. The trailer(s) will be appended automatically, i.e. without having to change your usual way of proceeding, and without any change of the screen displayed. Please note that the trailer text is not displayed.

The global settings for e-mails are configured by your administrator, for instance which trailer is appended for which e-mail recipients, or at which position a trailer is inserted. Normally, trailers will be placed at the beginning or the end of the e-mail. But it is also possible to integrate trailers anywhere in the middle of the message. In this case, you can set the exact place of the trailer by way of a specific keyword (to be placed where the trailer is to be inserted). This keyword (which must have been communicated to you) has to be surrounded by percentage signs, e.g. %Trailer%:



The screenshot shows an email composition interface with a toolbar at the top containing icons for Send, Send and File, Save As Draft, Address..., Delivery Options..., and Tools. The email header fields are as follows:

To:	Zoe Green
cc:	
bcc:	
Subject:	information

The body of the email contains the following text:

Dear Ms Green,

Thank you for your e-mail. I will need to investigate your request below with my colleagues and get back to you next week. I hope this will be soon enough? In the meantime I send you the latest information about our company:

%Trailer%

Please do not hesitate to contact me should you have any further queries.

Kind regard
John Miller



Please consult your administrator before using this option.

7 Differences Using a Web Browser

7.1 Opening the iQ.Suite User Portal in the Web Browser




Besides using a Notes client, it is also possible to access the iQ.Suite User Portal through a web browser. This allows to access iQ.Suite from any workstation without having to install a client version. Access is possible with any web browser, e.g. with Microsoft Internet Explorer.


Though slightly different in its appearance, the web-based iQ.Suite user interface provides the same functionalities as with a Notes client. All it takes is a system set up by your administrator according to company policies and a web link. Alternatively, you can also connect to the server directly in the browser through the IP address. In this case, authentication is required for security reasons. Please consult your administrator if you need assistance.

7.2 User Interface

Following authentication, the iQ.Suite User Portal starting page is displayed.

As in the Notes client, the iQ.Suite User Portal screen is divided into the following areas:

-  **Function bar**
Displays the available functions, e.g. **Help**. To set the language to **English** use the Internet options of the web browser.
-  **Display window**
Area where the actual content is displayed.
-  **Category menu bar (navigation)**
Area where you can navigate within categories and sub-categories.

 Please note that you may not have access to all of the functions. The functions available depend on the configuration. Please contact your administrator for assistance.

For details on using the Lotus Notes client, please refer to your Lotus Notes Documentation.

Each subcategory provides various buttons that allow to switch between views and settings as well as perform specific e-mail functions:

■ **iQ.Suite <module name>**

Provides information on the database currently selected. Your administrator may have given you access to several databases. You can switch from database to another by clicking on the **Next database** subcategory. As of four configured databases, a **Select database** subcategory is displayed for selection purposes.

■ **Help**

If you need explanations or additional information, click on **Help** to access both the present documentation and the Administration Manual as .pdf files.

■ **Print**


A printer selection window is opened to **print** the current view.

■  **Expand**

This button corresponds to **Expand** in the Notes client. Your list view is expanded from the **Active** and **Not Active** levels to all sub-entries.

■  **Collapse**

This button corresponds to **Collapse** in the Notes client. As the opposite of the **Expand** function, your list view is reduced to the **Active** and **Not Active** levels. This may be useful for very long lists with many entries.

■  **Double arrow left**

Goes to first page when navigating through long lists.

■  **Arrow left**

Goes to previous page of the list. When the first page is reached, all individual entries from this first page of the list are displayed.

-  **Double arrow right**

Goes to last page when navigating through long lists.

-  **Arrow right**

Goes to last page of the list. When the last page is reached, the last individual entry of the list is displayed.


Depending on the module selected, additional buttons may be available to perform specific functions.


7.3 The Absence Management Category

Absence Management is used to forward or redirect e-mails to another or an additional recipient. For details please refer to [“What is Absence Management?” on page 22](#).

7.3.1 Absence Management Functions

The **Absence Management** category is divided into several subcategories (e.g. By User, By Date, etc.), which allows to select different views and sorting options for your forwarding or redirection documents.

Select the desired subcategory under **Absence Management**. The buttons available in each subcategory (such as ) allow to perform different actions. All entries listed can be enabled or disabled. Open (double-click) the desired entry and set the status to **Active** or **Not Active**. Be sure to work in Edit mode (**Edit** button).



Period	Status	For	To	Quar.	Access	Message
20.06.2006 - 21.06.2006	Active					I am out of office until 21.06.2006. F
20.06.2006 - 21.06.2006	Active					I am out of office until 21.06.2006. F
20.06.2006 - 21.06.2006	Active					I am out of office until 21.06.2006. F
16.08.2006 - 16.08.2006	Not active					I am out of office until 08/16/2006. \
18.09.2006 - 18.09.2006	Active					I am out of office until 09/18/2006. F
18.09.2006 - 18.09.2006	Not active					I am out of office until 09/18/2006. F
08.11.2007 - 08.11.2007	Active					I am out of office until 21.06.2006. F
08.11.2007 - 08.11.2007	Active					I am out of office until 21.06.2006. F
09.11.2007 - 09.11.2007	Active					I am out of office until 21.06.2006. F
13.11.2007 - 13.11.2007	Active					I am out of office until 08/16/2006. \
						I am out of office until 09/18/2006. F

Depending on the rights granted, you may have access to the **New** button, which allows to perform the following:

- **New → Standard Forward**

This function is used to create a new forwarding document in standard mode.

■ **New → Advanced Forward**

This function is used to create a new forwarding document in advanced mode.

■ **New → Redirection**

This function is used to create a new redirection document.

7.3.2 Setting up Standard Forwarding

To set up forwarding for a specific period of absence proceed as follows:

1. Open the iQ.Suite User Portal¹⁸.
2. If the function bar displays the **New → Standard Forward** function, create a new forwarding document:

Clerk Standard Forward

Basics
Operations
Misc.
Comments

Status
Active

Absence profile for

Start at
05/04/2009

Up to and including
05/06/2009

Forward e-mails
Yes

Forward to
Anna Glenn\mycompany

Use for Quarantine Access
No

Sender notification mode
Always notify

- **Status:** Set the document to **Active** to ensure that the e-mails will be forwarded when the specified period of absence begins. If set to **Not Active**, the e-mails will not be forwarded.
- **Absence profile for:** By default, this is preset to your own profile. With appropriate rights, you may also select another person from the Notes address book.
- **Start at / Up to and including:** Set the period of your absence. During this period of time, all e-mails addressed to you will be forwarded to the deputy specified.

18. Refer to ["Opening iQ.Suite User Portal" on page 6](#)

- **Forward e-mails:** If you want all e-mails addressed to you to be forwarded select **Yes**. If set to **No** and **No - notify sender only**, the e-mails will not be forwarded to a deputy¹⁹.
- **Forward to:** Enter the desired deputy. With appropriate rights, you may also select the names from the Notes address book.
- **Use for Quarantine Access:** If set to **Yes**, the deputy will not only receive all of the e-mails delivered to your mailbox, but he will also have access to the e-mails moved to your quarantine²⁰. In this case, your deputy will be provided with a separate quarantine area in his own iQ.Suite User Portal in order to have access to your quarantine e-mails (**Quarantine → Quarantine access for deputy**).
- **Sender notification mode:** If you wish to inform the e-mail senders of your absence select **Always**. The sender will be sent an e-mail that informs him of your absence. If you do not want the e-mail sender to be notified, select **Never**.

3. Open the **Operations** tab:

new composed

Clerk Standard Forward

Basics | **Operations** | Misc. | Comments

Message for forwarding recipient

Subject
%SUBJECT%

Text
I am out of office up to and including %FINAL-DATE%. Please deal with my mail

Replace original body
No

Message for sender in case of forward

Subject
Autoreply: %SUBJECT%

Text
I am out of office up to and including %FINAL-DATE%, but your e-mail will be handled by my substitute %DEPUTY%.

Message for sender in case of non-forward

Subject
Autoreply: %SUBJECT%

Text
I am out of office up to and including %FINAL-DATE%. Your e-mail will be handled as soon as I am back.

19. For a detailed description of these options please refer to [“Forwarding E-mails From Specific Senders to Selected Persons” on page 32](#) and [“Notify Sender Without Forwarding to Deputy” on page 29](#).

20. Refer to [“What is the Quarantine?” on page 9](#).

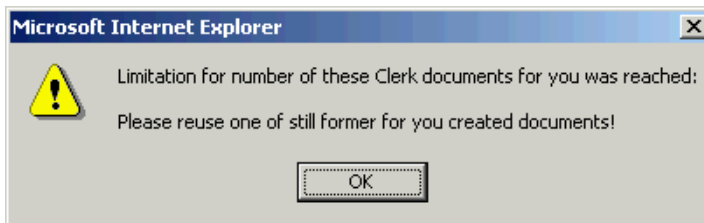
- **Message for forwarding recipient:** Where required, change the subject and the text of the message to be sent to your deputy. Under **Subject**, you can use the "%SUBJECT%" variable. Under **Text**, you can use the "%START-DATE%" and "%FINAL-DATE%" variables. When the e-mail is forwarded, these variables will be replaced with the subject of the e-mail or the start / end dates of your absence.
- Leave the **Replace original body** option set to **No**. This option should only be set to **Yes** if you do not wish your deputy to be able to read the e-mail body text. In this case, the actual message is hidden and the deputy receives nothing but the subject and the specified notification message. However, keep in mind that your deputy will be virtually unable to answer any of the e-mails if he does know their contents.
If, in turn, your deputy has set up a forwarding (to another person) but has **not enabled** this option, this person will receive the e-mail with both texts, i.e. with the original message and with the forwarding message defined above!
- **Message for sender in case of forward:** Enter the text and the subject of the notification to be sent to the sender of the forwarded e-mail. The sender notification is sent as separate e-mail.
- **Message for sender in case of non-forward:** If, in the **Basics** tab, you have set the **Forward e-mail** field to **No**, use this field here to specify the message for the e-mail senders.



If you have already created an absence document to set forwarding options, you can always re-use the same document for each planned absence and simply change the period of absence. The document can always remain active, as the actions are only performed during the absence period defined. The placeholder %FINAL-DATE% automatically inserts the end date you have set. The placeholder %DEPUTY% is replaced with the recipient of the forwarding. If several persons are specified, they have to be separated by comma. As a general rule, always enter the e-mail address of your deputy as Internet address, e.g. "user@company.com". Otherwise the sender will receive an address he will be unable to send a message to!

4. Open the **Misc.** tab.
 - **Document authors:** Provided you have appropriate rights, you can use this field to grant read rights to your deputy or any other person for the forwarding document created here. With appropriate rights, you can select the desired senders from the Notes address book.
 - **Runs on server:** The asterisk (*) in this field means that the document applies to all servers. With appropriate rights, you can select another server. However, do not change this entry without having consulted your administrator!
5. **Save and close** the forwarding document (in the upper function bar).

If the following message appears, the maximum number of Clerk documents has been reached. The present document cannot be created. Use an existing document instead and change the settings as required.



For further information on options for forwarding e-mails please refer to:

- [“Notify Sender Without Forwarding to Deputy” on page 29](#)
- [“Setting up \(Advanced\) Forwarding for E-mails With Specific Contents” on page 30](#)
- [“Forwarding E-mails From Specific Senders to Selected Persons” on page 32](#)

7.3.3 Setting up a Redirection

Basically, the settings for redirecting e-mails work in the same way as for forwarding.

For further information on options for redirecting e-mails please refer to

[“Setting up a Redirection” on page 33.](#)

7.3.4 Setting up Quarantine Access for Deputies

As a general rule, deputies can only edit the e-mails that are delivered to their mailbox (forwarding) or would be so (redirection). E-mails classified as "unsolicited" and therefore moved to the quarantine²¹ can neither be viewed nor processed. Provided you have appropriate rights, you can set up access to your quarantine e-mails for your deputies. This requires that both you and your deputy have access to the **Quarantine** category in the iQ.Suite User Portal. Please note that this, in turn, requires that the administrator has enabled the function **Clerk quarantine documents access** (under **User specific quarantine access**) in the job!

To provide one or more deputies with access rights to your quarantine, proceed as described under [“Setting up Quarantine Access for Deputies” on page 35.](#)

21. Refer to [“The Quarantine Category” on page 9](#)

7.4 The Quarantine Category

The quarantine is a separate area of the iQ.Suite User Portal used to collect all unsolicited e-mails such as spam that were originally addressed to you. Once identified as "unsolicited", the e-mails are "blocked", stored in this quarantine and not delivered to you.

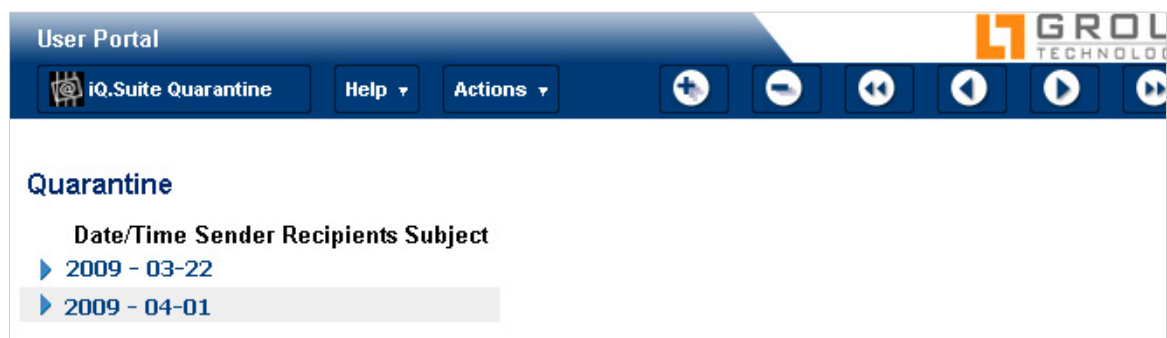
For details please refer to ["What is the Quarantine?" on page 9](#).


7.4.1 Quarantine Functions

The **Quarantine** category divides your quarantined e-mails into several subcategories (**Today, By Sender**, etc.), which allows to select different views and sorting options for your quarantined e-mails.

Example:

To view all Quarantine e-mails that you have received today, click on the subcategory **Today**. Double-click on an entry to display the quarantined e-mails individually.



Besides the buttons available in each subcategory (such as ) , you may have access to the **Actions** button. Depending on the rights granted, the following functions are available for quarantined e-mails:

■ Deliver To Me

Largely corresponds to the **Deliver To Me** function in the Notes client. The selected e-mail is sent to you again and moved to your mailbox.

■ To My Whitelist

The sender of the mail is added to your personal whitelist²². E-mails from this sender will be automatically "cleared" and delivered to you immediately.

■ To My Blacklist

The sender of the mail is added to your personal blacklist. E-mails from this sender will be automatically "blocked" and not delivered to you.

22. Refer to ["The Black- and Whitelists Category" on page 15](#)

Depending on the rights granted, one or more additional buttons may also be available:

■ **Deliver To Recipients**


Largely corresponds to the **Resend** function in the Notes client. The mail is sent one more time to the recipients specified in the e-mail, with no further options available (as opposed to the Notes client). After an e-mail has been delivered from the quarantine, a corresponding icon is displayed in the pane on the left-hand side. Please note that, for security reasons, this function is normally restricted to administrators. Consult your administrator for details.


■ **To Global Blacklist**

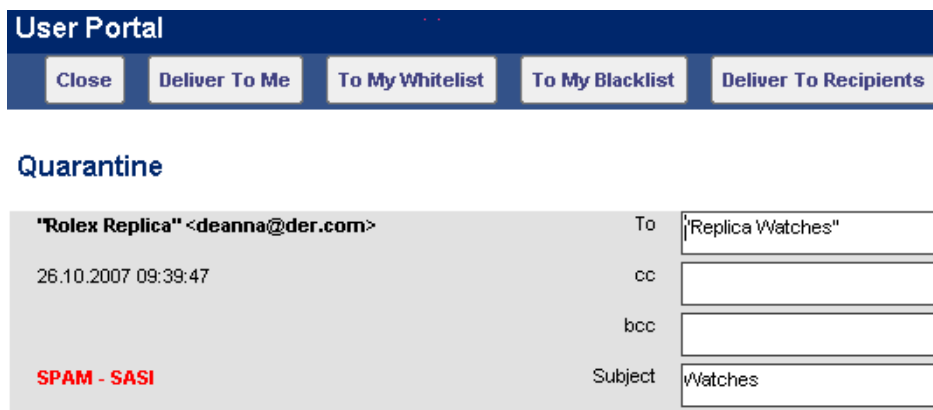
The sender of the e-mail is added to the company's global blacklist. This means that e-mails from that sender are systematically rejected by **all potential** recipients within the company. Typically, a global blacklist applies to an entire domain or several groups of users within your company, who will no longer receive any e-mails from this sender. The e-mails from senders listed in the global blacklist are quarantined for all users involved.

■ **To Global Whitelist**

The sender of the e-mail is added to the company's global whitelist. This means that e-mails from this sender are systematically accepted by **all potential** recipients within the company. Typically, a global whitelist applies to an entire domain or several groups of users within your company, who will automatically receive the e-mails from this sender.

 Please note that you may not have access to all of the functions. The functions available depend on the configuration. Please contact your administrator for assistance.

 After having opened (double-clicked) a quarantined e-mail, the same buttons are available as in the preceding view. This allows to perform the corresponding functions for an individual open quarantine e-mail.



User Portal

Close Deliver To Me To My Whitelist To My Blacklist Deliver To Recipients


Quarantine

"Rolex Replica" <deanna@der.com> To: "Replica Watches"

26.10.2007 09:39:47 cc:

bcc:

SPAM - SASI Subject: Watches


 To add a quarantined address to a whitelist or blacklist, proceed as described for the Notes client, refer to ["Adding the Sender to a Blacklist or Whitelist from the Quarantine" on page 14.](#)

7.5 The Blacklist/Whitelist Category

Blacklists and whitelists are used to define "dubious" and "trustworthy" senders respectively and handle e-mails from these senders accordingly. For details on blacklists and whitelists refer to ["What are Blacklists and Whitelists?" on page 15.](#)

7.5.1 Blacklist/Whitelist Functions

The **Black-/Whitelist** category is divided into the subcategories **By Category** and **By sender**, which allows to select different views and sorting options for the lists and the sender addresses included in them. For instance, to view all senders whose e-mails you do not wish to receive (i.e. listed in your blacklist and automatically quarantined), select the subcategory **By Category**.






Select the desired subcategory under **Black-/Whitelist**. The buttons available in each subcategory (such as ) allow to perform different actions. All entries listed can be enabled or disabled. Open (double-click) the desired entry and set the status to **Active** or **Not Active**. Be sure to work in Edit mode (**Edit** button).



Please note that **Merge** function is not available in the web browser

Depending on the rights granted, you may have access to the **New** button, which allows to perform the following actions.



List	Sender	Recipient
▼ Users-BL		
	 debb@na45hou.net	 Anna Glenn/mycompany
	 eddy@123.net	 Robert Fontane/mycompany
	 chase@yahwni.com	 David Galler/mycompany
	 tiffany@clockhouse.com	 Elena Martin/mycompany

■ User's Blacklist Entry

This function is used to create a new entry for a sender address that is added to your blacklist.

■ User's Whitelist Entry

This function is used to create a new entry for a sender address that is added to your whitelist.

For a detailed description please refer to ["Adding a Sender to a Blacklist or Whitelist" on page 56.](#)

■ Black-/Whitelist Entry

This function is used to create a new list category for your sender addresses. Whether this is a blacklist or whitelist is set through the job definition and the iQ.Suite selection rules. For details please refer to the Administration Manual.

7.5.2 Adding a Sender to a Blacklist or Whitelist

There are several possibilities to add a sender to a blacklist or whitelist. For details please refer to [“Adding a Sender to a Blacklist or Whitelist” on page 18](#). The actions actually available depend on the rights granted and the configuration settings made by your administrator.

In the example below, a sender address is manually added to a blacklist:

1. Open the iQ.Suite User Portal²³ and select a subcategory under **Black-/Whitelist**.
2. Click the **New** button (on the right-hand side of the screen) and select **User’s Whitelist Entry** or **User’s Blacklist Entry**. This functions require appropriate rights.

The screenshot shows a web form titled "Wall Black-/Whitelist Entry". At the top right, it says "new composed - pre". Below the title are two tabs: "Basics" (selected) and "Comments". The form has the following fields:

- Black-/Whitelist:** A text input field containing "Users-BL".
- Status:** A dropdown menu with "Active" selected.
- Sender type:** A dropdown menu with "User" selected.
- Sender address:** An empty text input field with a small icon of a person to its right.
- Recipient address:** A text input field containing "Admin Admin/LndTestOrg".

3. Set the **Status** field to **Active**.
4. In the **Sender type** field, set for which type of sender the entry is to be created:
 - **User:** A single user is added to the blacklist or whitelist. Depending on the list, e-mails from this sender will either directly delivered to you or blocked and moved to your quarantine.
 - **Domain:** Both the sender and the entire domain are added to the blacklist or whitelist. This allows to, for instance, simultaneously add all employees from a cooperation partner to a whitelist.
 - **All:** Depending on whether the entry applies to a whitelist or blacklist, all e-mails will be either delivered to your mailbox or quarantined, regardless of the sender address.

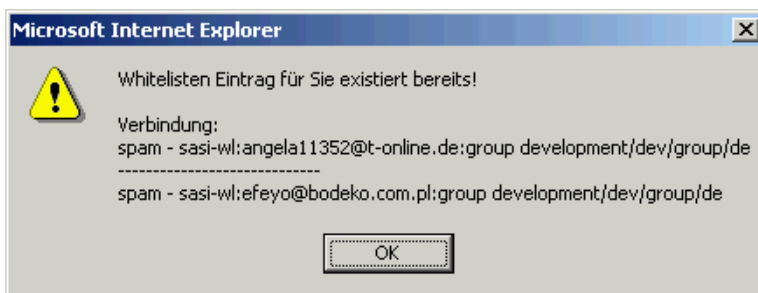
23. Refer to [“Opening the iQ.Suite User Portal in the Web Browser” on page 46](#)

5. Select the **sender address** from the Notes address book. Internet addresses have to be entered in the form "user@domain.com". Multiple addresses have to be separated by a line break.
6. Click **Save**.

The blacklist entry created in this example is automatically sorted into the **Users-BL** blacklist category. This category cannot be changed!

For alternative procedures for adding a sender address a blacklist or whitelist, refer to the description under [“Adding a Sender to a Blacklist or Whitelist” on page 18](#).

In case the selected sender address has already been entered in your whitelist, the following message is displayed:



7.5.3 Removing an Address From a Blacklist or Whitelist

You can remove an individual address from a blacklist/whitelist or an entire entry. For details please refer to [“Removing an Address From a Blacklist or Whitelist” on page 20](#).



Please note that removing an address from a blacklist or whitelist requires appropriate rights to the database! If in doubt consult your administrator!

7.6 The Trailer Category

Trailers are pieces of text such as a salutation or a disclaimer that are integrated into an e-mail.


Typically, trailers are appended at the end of the e-mail message.

For details on trailers please refer to [“What are Trailers?” on page 38](#).

7.6.1 Trailer Functions

Under **Trailer** select the subcategory **By category**. Normally, a separate trailer document is available for each trailer type. This document can be modified as required, for instance to change an attached advertisement message. Double-click the desired document to open and change it as required. Click **Activate** to enable a trailer document and have the specified trailer text appended to the e-mails.

Each trailer to be appended to an e-mail needs to be enabled by your administrator. Thus, if you wish to use a specific trailer for e-mails addressed to specific recipients only, please consult your administrator.

The buttons available in each subcategory (such as ) allow to perform different actions. The trailer documents listed can be enabled or disabled.



Type Name	Language	Date from	Date to
▼ Active			
▼ Department disclaimer			
SAMPLE - Department Disclaimer			
▼ Legal disclaimer			
SAMPLE - Legal Disclaimer			
▼ Marketing trailer			
SAMPLE - Marketing Trailer		11/01/2006	01/31/2007
▼ Personalized			
SAMPLE - Personalized Trailer			

Depending on the rights granted, you may have access to the **New** button, which allows to perform the following actions for your trailer documents:

- **New → Trailer document**

This function allows to create a new trailer document. Within the document, you can select the trailer type and enter the desired trailer text. However, before creating a new trailer document, be sure to check that no existing trailer document can be changed. Only use this option if you want to create a new Trailer type.



The **Configuration** and **Export** functions are not available in the web browser.

7.6.2 Adjusting an Existing Trailer Document

To create a trailer, there are several possibilities and configuration options, which can be set by you or your administrator. For details please refer to [“Integrating Trailers in E-mails” on page 42.](#)

Normally, the software will include a preconfigured trailer document that you can open and adjust as required, e.g. to change the advertisement message of a trailer. If several trailer documents are available, these will normally be different trailer types. For additional information on trailer types refer to [“Which Trailer Type for Which Scenario?” on page 39.](#)

The following example illustrates how to change an existing **Marketing Trailer** document:

1. Open the iQ.Suite User Portal²⁴ and select the subcategory **By Category**.
2. Open (double-click) an existing trailer document.

24. Refer to [“Opening the iQ.Suite User Portal in the Web Browser” on page 46](#)

Trailer Trailer document Ac	
Basics	Comments
Name	
SAMPLE - Marketing Trailer	
Description	
Sample for marketing trailer	
Status	
Active	
Language dependent	
No	
Trailer type	
... select from list	
Marketing trailer	
Timed	
Yes	
Trailer valid from	
02/22/2008	
to	
03/07/2008	
Trailer text	
***** MARKETING TEXT *****	

1. Click **Edit**.
2. The **Name** field displays the name of the trailer document. You may be able to change this setting.
3. **Status**: Set the trailer document to **Active** to ensure that the trailer text specified in this document is appended to your e-mails. This requires that your administrator has enabled the trailer document.
4. **Language-dependent**: To append trailers in different languages, set this option to **Yes**. Then click on the icon next to the **Language** field (only visible if set to **Yes**) and select the desired language. If the desired language is not included in the list, you need to adjust the language configuration. Typically, this function will not be available to you (function bar → **Configuration**).

Where required, please consult your administrator. For a description of the language configuration please refer to [“Changing the Language Configuration” on page 44](#).


5. **Trailer type:** Do not change the preconfigured trailer type for the trailer document. If you plan to create a new trailer document, use this field to select the trailer type. For information on trailer types refer to [“Which Trailer Type for Which Scenario?” on page 39.](#)
6. **Timed:** If the validity of a trailer is to be limited to a specific period of time, set this field to **Yes** and enter the validity dates under **Trailer valid from.**
7. **Trailer Text:** Enter the actual trailer text that is to be integrated in the e-mails.



If you wish to change the trailer text of a **Personalized Trailer**, e.g. to specify another salutation at the end of the e-mail message, please change the **Trailer Text** field only. The default settings in the other fields ensure that all address information is correct as it is automatically retrieved from the Notes databases. If you wish other or additional settings please consult your administrator for assistance. For additional information on the content of each field, place the cursor in the corresponding field and click **Help**.

7.6.3 Creating a New Trailer Document

Provided you have appropriate rights, you can create new trailer documents by selecting **New → Trailer document**. However, be sure to use this function only if no existing trailer document can be adjusted to your requirements. Typically, this function is used for trailers of a new trailer type.

1. In the function bar select **New → Trailer document**.
2. Give a **name** to the trailer document and click on the .button next to **Trailer type**.
3. Click ... **Enable** and enter a name for the new trailer type.

All other settings are the same as described under [“Adjusting an Existing Trailer Document” on page 59](#)

8 Delayed Sending of Messages

For e-mails that you send yourself, you can use a delayed sending function. This means that you create and send the e-mail in the usual way, but the actual sending is triggered later. The delayed sending command is set by way of a keyword.

For instance, you can send e-mails on particular days and/or times of day. You might, for instance, want to send an e-mail on a specific day (offers, birthday wishes, etc.), but know you will be out of office on that day. You can nonetheless send the message immediately, with a note in the Subject field that it is to be sent by the mail server on day X at time Y. Or you might want to send an e-mail with a large attachment to several recipients, but also exclude server problems. To do so, you can ensure that the e-mails are sent during the night. The e-mails to be deferred are temporarily buffered and then sent to the mail server at the date and time specified.



This requires that the e-mail is not sent via the web browser, as delayed sending is not available with a web browser. In addition, you need a valid license for the iQ.Suite Smart module, which has to be set up by your administrator. Consult your administrator if you need assistance.

8.1 Delayed Sending Using Keywords

To have an e-mail sent at a specific time, enter a keyword in the Subject field of the e-mail. The keyword is `<DELAY>` with a date and a time, for instance `<DELAY 00:05>` to delay the e-mail by 5 minutes. Enter the subject as usual and simply add the keyword.

Please note that the date/time format may differ, as it depends on the configuration setting selected by your administrator²⁵. The following options are available:

1. Delay by interval

The example above is an interval-based delay. The e-mail is delayed by the number of hours and minute specified in the keyword. The format is:

`hh:mm`

`hh` = hours, `mm` = minutes.

2. Sending at a set time

If your administrator has enabled the **Sending at a set time** option, the e-mail is sent at a time that you can set yourself. If the time specified lies in the past, the e-mail is automatically sent on the following day at the time set.

For instance, to have an e-mail sent at 12:05 AM, the keyword is `<DELAY 00:05>`. The keyword is the same in both cases, but results in different sending times. Consult your administrator to find out the option selected.

²⁵. Consult your administrator before using the Delayed Sending option.

The following formats are possible for delayed sending at a set time:

<code>dd.mm.yyyy hh:mm</code>	<code>dd = day, mm = month, yyyy = year</code>
<code>dd.mm.yy hh:mm</code>	<code>dd = day, mm = month, yy = year</code>
<code>mm-dd-yyyy hh:mm</code>	<code>mm = month, dd = day, yyyy = year</code>
<code>mm-dd-yy hh:mm</code>	<code>mm = month, dd = day, yy = year</code>
<code>hh:mm</code>	<code>hh = hours, mm = minutes</code>



If you specify a date, the time must also be entered. A date without time is considered invalid! If you enter both date **and** time, please be sure to insert the vertical line (pipe, press Ctrl + Alt + <), without blanks.



It is possible to use both delay options - set time **and** by interval. In this case two keywords are needed.