



iQ.Suite 9 for Domino 6.x and 7

Editor's note

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▶ 1 Introduction

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 a 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

1.3 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.


1. Whenever an e-mail is not delivered, it is stored in the Quarantine. Refer to ["What is the Quarantine?" on page 7](#).

2. Refer to ["What are Whitelists and Blacklists?" on page 12](#).

The following symbols are used:

 The info symbol is used to indicate 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 give you 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
- **User-specific Quarantine:** iQ.Suite with at least one module (any)
- **Black/whitelists:** iQ.Suite Wall
- **Delayed sending (attachment):** iQ.Suite Smart

Furthermore, all functions also depend on the iQ.Suite configuration on the Domino server. The functionality available to you may differ from the one described here. In that case, please contact your Administrator.

1.5 Copyright

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2 General

2.1 What is the iQ.Suite User Portal?

The iQ.Suite User Portal is a Notes application. Typically, a Notes application consists of several Notes databases. A Notes database can be used to perform certain functions or applications. The iQ.Suite User Portal is fully integrated in the **iQ.Suite for Domino** administration software.

The iQ.Suite User Portal will save you valuable time every day and increase productivity through the following functions:

- User-specific Quarantine Access
- White/Blacklist Management
- Absence Management

These functions are described in detail in the following sections.

2.1.1 User-specific Quarantine Access

The user-specific³ displays a list of all e-mails that were identified as spam and therefore blocked or intercepted and not delivered for another reason. Whenever an e-mail is not delivered to its intended recipient, it is stored in the Quarantine. In the Quarantine view, you have the possibility to retrieve selected e-mails or to place individual senders on a whitelist or blacklist⁴.

2.1.2 White/Blacklist Management

Whitelists are used to define trustworthy senders, i.e. whose mails are not to be checked for spam. On the other hand, mails from senders found on a blacklist are immediately discarded, i.e. never delivered.

2.1.3 Absence Management

For a freely configurable period of time, your electronic mail can be forwarded to selected persons or groups. E-mails from different senders or all senders from a specific company can be forwarded or redirected to different substitutes. For confidential information, forwarding or redirection can be disabled. Where required, senders, recipients and substitutes will receive notifications and reading confirmations.

3. Refer to [“What is the Quarantine?” on page 7.](#)

4. Refer to [“What are Whitelists and Blacklists?” on page 12.](#)

2.2 Opening iQ.Suite User Portal Using Notes Client

Start your Notes client and open the iQ.Suite User Portal as follows:

1. Click on **File** → **Database** → **Open**,



2. Select the Notes server hosting the current iQ.Suite User Portal in the filed **Server**.
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 9 database and click on **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. Please contact your Administrator for further assistance.

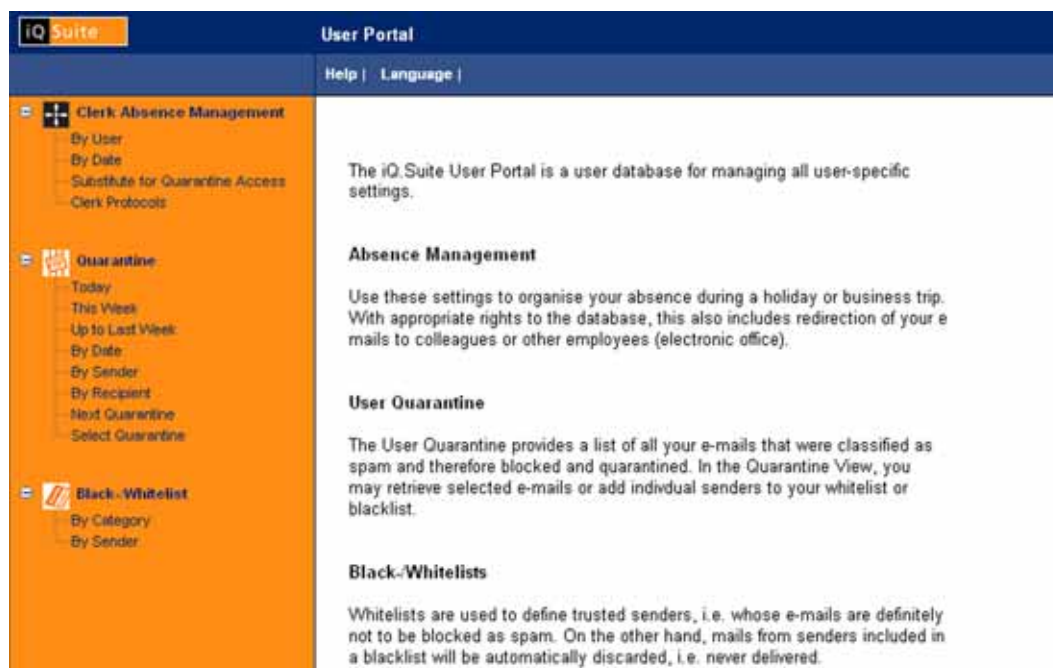
2.3 Opening iQ.Suite User Portal Using Web Browser

Instead of the Notes client, you may also use a web browser to open the iQ.Suite User Portal. This requires your Administrator to set up your system according to your company policies and to provide a web link. Please contact your Administrator for assistance.

The description in the sections below is based on the Notes client, but the functionality using a web browser is in principle similar.

2.4 iQ.Suite User Portal Database User Interface

After having opened the database, the following screen appears:



Click on **Language** to select your preferred language. The most important screen elements will be displayed in that language.

Further information on tabs and fields is available through the online help system, called context-sensitively, i.e. depending on the menu currently selected. To call the online help, click on **Help**.

To toggle between languages, click on the logo **iQ Suite** in the upper left corner. This will take you back to the starting page and the language selection.

On the left in the orange area, a menu is displayed with the following items:

- **Clerk Absence management**
- **Quarantine**
- **Black-/Whitelist**

The submenu items call different functions (e.g. **Substitute for Quarantine Access**) or different views of the same contents (e.g. **By Person, By Date**).



If some of the functions are not available, you may not have appropriate rights to the iQ.Suite User Portal database. Please contact your Administrator for assistance.

To terminate the iQ.Suite User Portal, close the database (**ESC** or **Close File**).

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

3 User-specific Quarantine

3.1 What is the Quarantine?

iQ.Suite stores any mails identified as spam or "to be denied" for some other reason in the so-called **Quarantine** (a Notes database), where they remain until they are checked and/or deleted by an authorized user such as the Administrator. It is possible to operate several Quarantines for different purposes. Typically, the Quarantine will be configured by the Administrator so that quarantined e-mails are automatically deleted after a given period of time.

The access provided by the iQ.Suite User Portal enables the user to view the quarantined e-mails and deliver them after all where required⁵. The user thus has a possibility to decide for himself if a specific mail is to be considered as spam or not.

The Quarantine can be opened using your Notes client or the browser. The subsequent description is based on using the Notes client, but the functionality using the browser is basically identical⁶.



This description only applies to e-mails identified as spam and therefore moved to the Quarantine; it does not apply to the e-mails in your mailbox!

3.2 Notification on Quarantined Spam Mails

First, you need to know if any (and which) mails addressed to you were identified as spam. To that end, a Quarantine summary notification is configured by the Administrator and periodically sent to all users. This summary notification contains a list of all quarantined e-mails that can be accessed by the user. The e-mails listed in the notification are included as links and are directly opened in the Quarantine. Whether the e-mails are opened in the Notes client or in the browser is set by the Administrator when configuring the notification.

In case you do not receive any summary notifications, please contact your Administrator for assistance.

3.3 Opening the Quarantine

3.3.1 Procedure

1. Open the iQ.Suite User Portal⁷.
2. Select a view underneath the **Quarantine** menu.

A list of all of your e-mails currently quarantined is displayed.



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

5. To himself or others - depending on the rights to the database

6. Also refer to ["Opening iQ.Suite User Portal Using Web Browser" on page 5](#).

7. Refer to ["Opening iQ.Suite User Portal Using Notes Client" on page 5](#).

3.3.2 Opening a Specific E-mail

1. Open your summary notification mail.
2. Click on the e-mail in the summary notification.

A view of the individual e-mail is displayed, with various options available.

3.4 Adding an Address to a Whitelist

Adding an address from the Quarantine is only meant for cases where an e-mail from a communication partner has wrongly been categorized as spam and therefore quarantined. You can add the sender address from such a quarantined mail to your whitelist.

Proceed as follows:

3. Open the iQ.Suite User Portal⁸.
4. Click on a view underneath the **Quarantine** menu.
5. Select or open the desired mail.
6. Click on the **To my Whitelist** button.
7. Confirm the message box **The following sender was added to your Whitelist** displayed next with **OK**.

A whitelist entry has thus been created for this sender address. It is automatically assigned to a category with the same name as the existing Quarantine category⁹, under which the mail was stored.

Proceed in the same way as for adding an address to a whitelist (see above), but click on the **To my Blacklist** button.

For details on how to remove an address from a whitelist or blacklist, refer to [“Removing an Address from a Blacklist or Whitelist” on page 15](#).

3.5 Adding an Address to a Blacklist

Proceed in the same way as for adding an address to a whitelist (see above), but click on the **To my Blacklist** button.

For details on how to remove an address from a whitelist or blacklist, refer to [“Removing an Address from a Blacklist or Whitelist” on page 15](#).

8. Refer to [“Opening iQ.Suite User Portal Using Notes Client” on page 5](#).

9. Refer to categories, [“View by Category” on page 12](#).

3.6 Actions in User-specific Quarantine

3.6.1 In the Quarantined Mails General View

The general view of your quarantined mails provides a menu bar with the following functions:



The first item in the menu bar (next to the Quarantine icon) displays the Quarantine database currently selected. Your Administrator may have set up access to more than one Quarantine database for you. To toggle between databases, click on **Next Quarantine** in the left-hand window. A **Select Quarantine** function is available as one of four Quarantine databases.

- **Help**

Calls the context-sensitive online help on individual fields.

- **Print**

Prints the documents.

- **Deliver to Me**

The e-mail is delivered to the active user. This does **not** mean that it is removed from the Quarantine! Mails can thus be delivered more than once. If a document from the quarantine has been delivered or resent, the overview will display the **Resend** icon.

- **To My Whitelist**

The sender of the mail is added to the personal whitelist¹⁰ of the active user. This means that mails from this sender are automatically “cleared” for that particular user. The following message appears when a sender has successfully been added to a whitelist:



If the whitelist already contains an entry for that sender, the message below appears (**Attention:** the message does not appear if the whitelist entry was created manually using the **New** menu).



Updating the view of new blacklist or whitelist entries may take up to one hour. During that time, entering duplicate entries in a blacklist or whitelist is not recognized.

10. Refer to [“Whitelists and Blacklists” on page 12](#).

■ To My Blacklist

The sender of the mail is added to the personal blacklist of the active user. This means that mails from this sender are automatically discarded for that particular user only. The following message appears when a sender has successfully been added to a blacklist:



To distinguish between the whitelist and the blacklist, a yellow exclamation mark is displayed with the message confirming the address has been added to the blacklist.

If the blacklist already contains an entry for that sender, the message below appears (**Attention:** the message does not appear if the blacklist entry was created manually using the **New** menu).



Updating the view of new blacklist or whitelist entries may take up to one hour. During that time, entering duplicate entries in a blacklist or whitelist is not recognized.

■ Resend

The mail is resent via the Notes client, with various options available for individual or multiple mails and other recipients (other than the original recipient). Typically, this function is restricted to administrators. If a document from the quarantine has been delivered or resent, the overview will display the **Resend** icon.

■ Deliver to Recipients (with browser only)

A simplified **Resend**, for using a browser only. The mail is delivered to the original recipients. There are no additional options (as for Resend) available. The current user will only receive the mail if he is one of the original recipients.

■ Deny

The mail is blocked, i.e. prevented from being resent. A blocked e-mail is highlighted with a red "prohibited" icon in the overview.

■ Revoke Deny

The **Deny** instruction is canceled.

■ To Global Whitelist

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

■ To Global Blacklist

The sender of the mail is added to the company's global blacklist. This means that mails from that sender are systematically rejected by **all potential** recipients within the company.

■ To Training

The document in the quarantine is added to the training database and thus integrated in the CORE teaching process. This action is only displayed if the corresponding role is released for the user.

3.6.2 In the Open Quarantine Mail View

Depending on your access rights, further functions are available when a quarantined mail is opened with a double-click:

■ Close

The Quarantine mail is closed and the Quarantined Mails General View is displayed.

■ To Other Whitelist

With this option, the sender of the quarantined mail can be added to any other person's (included in the address book) whitelist.

■ To Other Blacklist

With this option, the sender of the quarantined mail can be added to any other person's (included in the address book) blacklist.



If some of the functions are not available, you may not have appropriate rights to the iQ.Suite User Portal database. Please contact your Administrator for assistance.



Most of the times, the following options will be available: **Help, Print, Deliver To Me, To My Whitelist, To My Blacklist**. All other options require extended rights.



In case an e-mail was blocked, delivered or resent, the corresponding icon and the date when the action was run are displayed in the overview.

4 Whitelists and Blacklists

4.1 What are Whitelists and Blacklists?

Whitelists are used to define trustworthy senders, i.e. senders who are sure not to send spam. Mails from such known communication partners are not checked for spam but delivered immediately.

Blacklist are the exact opposite. Sender addresses found on a blacklist are not checked but automatically blocked and discarded, i.e. moved to the Quarantine.

With the iQ.Suite User Portal, each user is able to access and manage personal whitelists/blacklists, e.g. to modify an existing one or to create a new whitelist/blacklist¹¹.

4.2 Opening a Whitelist or Blacklist

8. Open the iQ.Suite User Portal¹²
9. Click on a view underneath the **Black-/Whitelist** menu.

A list of your whitelists is displayed, sorted according to the view selected.



When called for the first time, opening the black/whitelists may take somewhat longer.

The first item in the menu bar (next to the Black/Whitelist icon) displays the blacklist/whitelist database currently selected. Your Administrator may have set up access to more than one blacklist/whitelist database for you. To toggle between databases, click on **Next Black-/Whitelist**. A **Select Black-/Whitelists** function is available as of four blacklist/whitelist databases.

4.2.1 View by Category

The whitelist entries are displayed sorted by Status¹³ and within the Status by whitelist category. A whitelist category (or simply called category) consists of individual whitelist entries.

Example:

Click on the expansion arrow (also called "twistie") to open a category, for instance **Spam-CORE**. The following view is displayed:

SPAM - CORE	
mi@cyberoficina.com	#mail-ir
msevent@event-team.com	Günthe
pulver_merlyn@swbell.net	Claudie
pulver_merlyn@swbell.net	CH=GÜ
webspherepower+arne.bergmann-group-technologies.co	Günthe

Double-click to open an individual whitelist entry:

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

12. Refer to "[Opening iQ.Suite User Portal Using Notes Client](#)" on page 5.

13. Active and Not active

SPAM-CORE

Wall Black-/Whitelist Entry

Basics	
Black-/Whitelist	SPAM-CORE ▾
Status	<input checked="" type="radio"/> Active <input type="radio"/> Not active
Sender type	User ▾
Sender address	mi@cyberoficina.com ▾
Mail sender is allowed to edit Whitelist entry	<input type="radio"/> Yes <input checked="" type="radio"/> No
Recipient type	User ▾
Recipient address	#mail-in-sale@group-wp ▾
Mail recipient is allowed to edit Whitelist entry	<input type="radio"/> Yes <input checked="" type="radio"/> No

This entry belongs to the category **SPAM-CORE** (entered in the **Black-/Whitelist** field). The entry is **Active**, which means that it is taken into account for spam checking. The entry is valid for mails from the sender address **mi@cyberoficina.com** to the recipient address **#mail-in-sales@group-wp**. Typically, the recipient address will be your own address, unless you are entitled to view other persons' whitelist entries,



Such an entry is created by clicking on the **To my Whitelist** button in the Quarantine (refer to [“User-specific Quarantine” on page 7](#)).



Do not move individual whitelist entries to other categories!

4.2.2 View by Sender

The whitelist entries are displayed sorted by Status¹⁴ and within the Status by sender domain. The corresponding address is displayed under the domain and the whitelist category under the address.



Use this view if you need to find a specific sender because the whitelist entry is to be modified or deleted.

4.3 Adding a Sender to a Whitelist

Depending on your rights, there are different ways to add a communication partner to your whitelist:

1. Create a new whitelist entry manually
2. Write an e-mail to the communication partner
 - a) with sending the mail
 - b) without sending the mail
3. Add an address from the Quarantine. Refer to [“Adding an Address to a Whitelist” on page 8](#).

14. Active and Not active

4.3.1 Create a New Whitelist Entry Manually

1. Open the iQ.Suite User Portal¹⁵
2. In the upper menu bar, click on **New**.



3. Click on **User's Whitelist Entry**.
4. The following view is displayed:

'New Users Whitelist Entry'
Wall Black-/Whitelist Entry

Basics | Comments

Basics

Black-/Whitelist	Users-WL
Status	<input checked="" type="radio"/> Active <input type="radio"/> Not active
Sender type	User
Sender address	
Recipient address	Seven AdminTest

- a) Set the **Status** field to **Active**.
- b) In the **Sender type** field, set whether the entry is to be created for a specific user, for an entire domain or for all senders.
- c) Enter the sender address in the **Sender address** field. Enter Internet addresses as follows: "user@domain.com". Addresses from the Notes Address Book have to be entered in the form "name/company/com" without domain. Multiple addresses have to be separated by a line break. Click on the arrow to add addresses from the Notes Address Book.
- d) Click on **Save**.

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



A whitelist entry is limited to a maximum of 20 sender and recipient addresses; wildcards such as the asterisk (*) are not allowed within an e-mail address!

Create a New Blacklist Entry Manually

To add an address to a blacklist, click on **User's Blacklist Entry** and then proceed as for a whitelist entry. Blacklist entries are automatically sorted into the **Users-BL** blacklist category. This category cannot be changed!

15. siehe dazu ["Opening iQ.Suite User Portal Using Notes Client" on page 5](#)



Use the **New → Black-/Whitelist Entry** button to create global whitelist/blacklist entries. In this document, the sender and recipient types can be freely set to **User, Domain** and **All**. It is also possible to select any sender or recipient address and to assign Edit rights to senders or recipients. Normally, this option requires extended rights.

4.3.2 Write an E-mail to the Communication Partner

iQ.Suite enables the user to add an address to his whitelist by simply writing an e-mail to that address. This function is available regardless of whether or not you have sufficient rights to create a whitelist or blacklist manually.

Two options are available when writing the mail:

1. Whitelist entry including sending the mail
2. Whitelist entry without sending the mail



The functions described below must be enabled on the server! Please consult your Administrator before using one of these options!

4.3.2.1 Whitelist Entry Including Sending the Mail

Write an e-mail to the desired communication partner. The system automatically creates a whitelist entry for that address, without further action required from the user.

4.3.2.2 Whitelist Entry Without Sending the Mail

Write an e-mail to the desired communication partner and insert a keyword in the Subject field. Due to this keyword, the communication partner's address is added to your whitelist without actually sending the e-mail. The keyword is set by your Administrator. The default setting is `###TOWHITELIST###`; the hash key ("`#`") are part of the keyword and need to be entered as well.

4.4 Adding a Sender to a Blacklist

Depending on your rights, there are different ways to add a communication partner to your blacklist:

1. Create a New Blacklist Entry Manually
2. Add an address from the Quarantine. Refer to [“Adding an Address to a Whitelist” on page 8](#).

Proceed as described under [“Adding a Sender to a Whitelist” on page 13](#) and select either **User's Blacklist Entry** (manual entry) or **To my Blacklist** (add from Quarantine).

4.5 Removing an Address from a Blacklist or Whitelist

4.5.1 Removing an Entire Black/Whitelist Entry

Removing addresses from a whitelist or blacklist requires appropriate rights to the database. Please contact your Administrator for assistance. The procedure described below removes the entire entry, regardless of the number of senders involved. Typically, a blacklist or whitelist entry contains only one sender address.

1. Open the iQ.Suite User Portal¹⁶.
2. Click on a view under the **Black-/Whitelists** menu.
3. Select the desired whitelist entry.
4. Press the **Del** key. The whitelist entry is marked for deletion.
5. Press **F9** to update the view. A confirmation box will appear. Click **OK** to confirm the deletion of the blacklist or whitelist entry.

4.5.2 Removing an Individual Sender Address

If a whitelist or blacklist entry contains several sender addresses and you wish to remove one specific address, proceed as follows:

1. Open the iQ.Suite User Portal.
2. Click on a view under the **Black-/Whitelists** menu.
3. Open (double-click) the desired whitelist/blacklist entry. Then click on **Edit**.
4. Select the name to be removed:

Basics	
Black-/Whitelist	Blacklist Bad People
Status	<input checked="" type="radio"/> Active <input type="radio"/> Not active
Sender type	User
Sender address	Spammy Spammer Elvira Virulina
Mail sender is allowed to edit Whitelist entry	<input type="radio"/> Yes <input checked="" type="radio"/> No
Recipient type	All

5. Press the **Del** key:
6. In the menu bar, click on **Save**. The sender address has been removed from the list.

16. siehe dazu ["Opening iQ.Suite User Portal Using Notes Client" on page 5](#)

5 Absence Management

5.1 Basics

Absence Management (forwarding and redirection) is handled by the iQ.Suite Clerk module. In this part of the iQ.Suite User Portal, each user can set up user-specific substitutes and forwarding settings (depending on rights)¹⁷.

Available functions (with comprehensive rights):

- Easily configurable, central e-mail redirection through authorized users and administrators.
- Define one or multiple substitutes/deputies for user-specific Quarantine access.
- Freely definable substitutes and groups of substitutes.
- Freely definable forwarding periods.
- Content-based forwarding to different substitutes.
- Disable forwarding for critical or encrypted e-mails and for specific senders and contents.
- Logging of forwarded e-mails.
- Exception handling for freely definable senders and contents.
- Quarantine access for substitutes: definition of substitutes for Quarantine.
- Reading confirmation from substitute to absentee.
- Central overview of all absences for authorized users.
- Definition of forwarding settings for other users/user groups by authorized users, e.g. in case of illness.
- Restricting internal and external forwarding to a group of authorized persons.
- Freely editable notification messages with %variables% for sender and substitute.
- Multiple Clerk databases possible.

5.2 Forwardings

Forwardings are designed to handle holiday and sickness leaves or business trips. For instance, you can name a deputy **D** for the period from **S** to **E**. **D** will receive a copy of every e-mail sent to you within the period defined. The original mail is sent to you personally. The copy is provided with an automatic notification that you are absent and that **D** should deal with the matter concerned. At the same time, the sender **X** of the e-mail will also receive an automatic notification that you are currently not available and that a substitute/deputy will take care of the matter.

The following can be configured as required:

- All notifications and messages
- Deputy **D**
- Start time **S**
- End time **E**

17. siehe dazu auch ["License Agreement" on page 2](#).

The absence management control documents can be viewed and edited by others (e.g. by the secretary), provided they are authorized to do so (refer to [“Rights within Menu” on page 19](#)). This option will be useful in the event of sickness, when an employee cannot come to work in order to activate the absence management system, or when employees are frequently out of office.

In the iQ.Suite User Portal, each user can create and configure his standard forwarding documents, while authorized users may also create and configure advanced forwarding and redirection documents. For details refer to [“Setting up Deputies for Holiday and Sickness Leaves” on page 20](#).

There are two types of forwarding:

- A standard forwarding document:
 - is for an individual user (the author),
 - forwards mail to one or more deputies (notification of absence without forwarding is also possible),
 - the period is set in days,
 - texts (notifications) are user-definable,
 - additional persons can be entered manually as document authors (comma-separated!).
- An advanced forwarding document:
 - has all the functions of the standard document,
 - can define additional forwarding or deputy exceptions for specific senders,
 - supports both address-based and content-based forwarding,
 - additional persons can be selected as document authors from the Notes address book.
 - can exclude specific contents from forwarding or forward to other receivers,
 - can combine specific contents in different e-mails fields to specific receivers through exceptions,
 - can define forwardings for other persons .

5.3 Redirections

When a mail is redirected, the deputy receives the original mail and not a copy thereof. The original recipient no longer receives the e-mail. The redirection function can be described as an "electronic secretariat" since the available settings go far beyond simple redirection.

Redirection is not systematically restricted to a specified period of time. It is used to **always** redirect the e-mails to the specified deputy **D**. A typical example: You do not wish to receive e-mails unless they come from your secretary. This would require the following settings in your document:

- Redirect mails to secretary (except those from secretary).
- If e-mail is from secretary, then deliver.

As the original recipient normally **does not want** to receive a redirected mail, no notification is sent to the recipient or the deputy.

Example:

You have included your address in a mailing list and wish to store the e-mails you receive via this list in a public folder and thus forward them immediately to the mailing database. You therefore redirect all the mails coming from this mailing list to the public folder and, of course, do not wish to see any of these e-mails in your own mailbox. Also, you do not wish to automatically notify the sender (i.e. the mailing list) that you have redirected these e-mails.

Only authorized users are allowed to redirect e-mails (refer to [“Rights within Menu”](#)). For information on how to set up redirection options, refer to [“Setting up Redirections” on page 25](#).

5.4 Menu: Clerk Absence Management

In the left menu bar, click on **Clerk Absence Management → By User**:



For	To	Period	Status	Messages
Paris, Mark	Washington, Bob	24.04.2006 - 26.04.2006	Not active	I am out of office until 26
London, Kal	Washington, Bob	24.04.2006 - 26.04.2006	Not active	I am out of office until 26
Goose, Jack	Chicken, Henry	----	Not active	Please inform me about it

The list displayed shows all absence documents for which you have access rights. The first item in the menu bar (next to the Clerk Icon) displays the Clerk database currently selected. Your Administrator may have set up access to more than one Clerk database or Clerk protocol database for you. To toggle between databases, click on **Next Clerk Database** or **Next Clerk Protocol Database** on the left. A **Select Clerk Database** function is available as of four Clerk databases.

Select **New** to create a new **Forwarding (standard)**, **Forwarding (advanced)** or **Redirection** control document.



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.

A redirection is always valid, as it does not depend on a specific period of absence. To cancel a redirection, simply disable it.

5.4.1 Rights within Menu

Depending on the user's rights, the menu options available may vary. For "normal users", rights are typically restricted to **Standard Forward**.

Under **Clerk Absence Management → By User** and under **By Date**, a "normal" user will find a list all documents related to himself, i.e. the documents in which the user is specified as author/forwarder or substitute. These documents can be viewed by double-clicking them; however, only the author¹⁸ may change a document. Authorized users¹⁹ may view all forwarding and redirection documents. If you need assistance on rights, please contact your Administrator.

18. Author in Lotus Notes = creator of the document

5.5 Setting up Deputies for Holiday and Sickness Leaves

If you want to set up a substitute to handle a holiday or sickness leave, you must create and activate a forwarding document. You have the choice between standard and advanced forwarding.

5.5.1 Advanced Forward

Access to advanced forwarding options is restricted to authorized users. Standard Forward is available for all users.

As delivered, the iQ.Suite User Portal database contains two sample entries, one for advanced forwarding and one for a redirection document. As, in most cases, all users will have access to the iQ.Suite User Portal, these samples may have been changed and therefore no longer be available.

In such a case, please select **New → Advanced Forward** and create a new document.



Use the example below as guideline. Once you have created the new document, you can edit it any time by selecting it from the list (double-click).

For further information on individual fields and their options, click on **Help** to call the online help.

1. Select **Clerk Absence Management → By User**

For	To	Period	Status	Messages
Paris, Mark	Washington, Bob	24.04.2006 - 28.04.2006	Not active	I am out of office until 28.04.2006, please deal with my mail
London, Kai	Washington, Bob	24.04.2006 - 28.04.2006	Not active	I am out of office until 28.04.2006, please deal with my mail
Goose, Jack	Chicken, Henry	—	Not active	Please inform me about important contents.

From the list displayed, select (double-click) **Kai London** and change the document (→ **Edit**).

2. In the **Basics** tab, set the **Status** option to **Active**.

The settings in the **Basics** tab apply whenever an incoming e-mail is not covered by **Exceptions** defined under the **Advanced** tab.

Clerk Advanced Forward

Basics	Operations	Advanced	Misc.	Comments
Basics				
Status	<input type="radio"/> Active <input checked="" type="radio"/> Not active			
Absence profile for	Kai London Mark Paris			
Start at	24.04.2006 16			
Up to and including	28.04.2006 16			
Forward e-mails	<input type="radio"/> Yes <input checked="" type="radio"/> No			
Forward to	Bob Washington			
Sender notification mode	<input type="radio"/> Always notify <input checked="" type="radio"/> Never			

19. Authorized user = user with extended rights

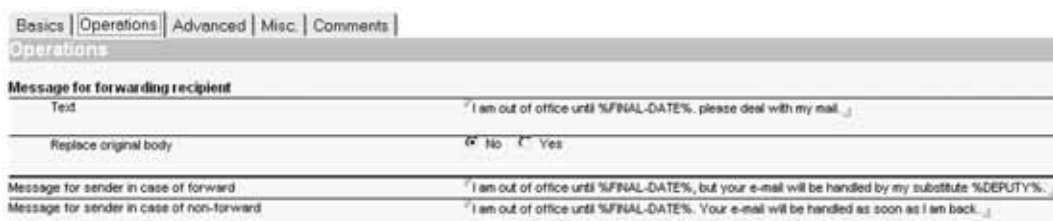
- a) In the **Absence profile for** field²⁰, enter the name of the user who is absent for a specific period of time. If you have created a new document, the name proposed will be your own name. But you can select any other name from the Notes Address Book. Click on arrow to open the Names selection window.
- b) Then, under **Start at** and **Up to and including**, set the period of time the absence profile is to be valid for.
- c) Set the **Forward e-mails** field to **Yes**; this will make the **Forward to** field visible and allow to specify a deputy. If you set this field to **No**, the e-mails will not be forwarded except for in the cases defined as **Exceptions** under the **Advanced** tab. This allows to forward only e-mails from specific senders to selected persons or groups.
- d) Then enter the deputy in the **Forward to** field. You can also select one or several names from the Notes Address Book. Click on the arrow to open the Names selection window:



The **No - notify sender only** option in the **Forward e-mails** field has the same effect as **No**, but the sender of the e-mail additionally receives a notification as set in the **Message for sender in case of non-forward** field under the **Operations** tab.

Thus, if you wish to send an absence notification to all senders without forwarding the mails to a deputy, proceed as follows:

- a. In the **Basics** tab, enable the **No - notify sender only** option in the **Forward e-mails** field.
 - b. Set the **Notify sender** field to **Always**.
 - c. 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**.
 - d. **Save** the document.
3. Now select **Operations**. The fields in the **Operations** tab are used to specify the message to be sent to the forwarding recipient as well as the message to be sent to the sender.



20. Die Bedeutungen der Felder innerhalb der Registerkarten finden Sie in der Online-Hilfe, wenn Sie auf Help klicken.

- a) In the **Text** field, enter the message for your deputy, i.e. the forwarding recipient. This notification is attached to the original mail.
- b) Leave the **Replace original body** option set to **No**. Only set it to **Yes** if you do not want your deputy (D) to be able to read the original e-mail messages. In this case, D will receive the e-mails with the original subject and the message text just defined for D. However, keep in mind that D will be virtually unable to answer any of the e-mails if he does know their contents. If, in turn, D has set up a forwarding (to C) but has not enabled this option, C will receive the mail with both texts, i.e. with the original message and with the forwarding recipient message defined above.
- c) In the **Message for sender in case of forward** field, enter the text to be sent to the sender when his mail has been forwarded to a deputy/substitute. The sender notification is sent as separate mail.
- d) In the **Message for sender in case of none forward** field, enter the text to be sent to the sender when his mail has **not** been forwarded to a deputy/substitute, i.e. when you have received his mail. The sender notification is sent as separate mail.

Each new absence document contains standard messages, which you can use as they are.

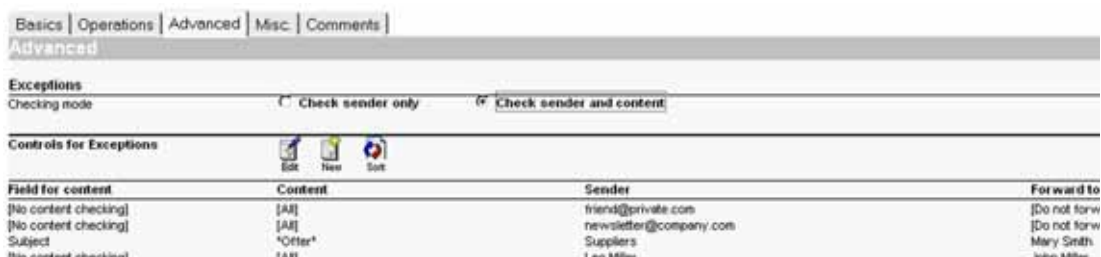


If using the placeholder %FINAL-DATE%, the end date specified is automatically inserted in the text. Thus, once the document has been created, any changes in the **Start at** and **Up to and including** date fields in the **Basics** tab will automatically be taken into account. The texts in the **Operations** tab can be left as they are.



The placeholder %DEPUTY% is replaced with the forwarding recipient address, with multiple entries separated by comma. Even if the mail is to be forwarded to a Notes user with a Notes address, specify his Internet address (e.g. "user@company.com"). Otherwise the sender will receive an address he will be unable to send a message to!

4. Now, in the **Advanced** tab, specify any **Exceptions** you may wish to define. The **Checking mode** switch provides two options: Define the exceptions for either sender addresses only or for sender addresses **and** mail contents.



- a) Exceptions for sender addresses only

Under **Checking mode**, select the option **Check sender only**, if you consider the sender address to be the relevant criterion rather than the contents of the mail.

Example

Scenario: All incoming e-mails addressed to you are to be forwarded to your deputy. In addition, you want to inform all senders about your absence - except for your subscribed newsletters, which you want to receive personally and which should not be notified of your absence. All newsletters come from the same sender.

In the description below, we will assume that you have already defined a deputy under the **Basics** tab (as described under Step 2 above) and that you have selected the **Advanced** tab. Now proceed as follows:

- Under the **Advanced** tab in the **Checking mode** field, select the option **Check sender only**.
- Next to **Control for Exceptions** click on the icon **New** for a new entry.
- Select **Do not forward - do not notify sender** and then enter the desired sender with his Internet address.

You can use placeholders to enter sender addresses. Refer to [Step b\) auf Seite 24](#).



If you want to enter a Notes user, usually an internal sender, you can select the address from the address book (click on the arrow).

- Click **OK**.
- In the upper menu bar, click on **Save**.

E-mails from the sender *newsletter@company.com* will not be forwarded to your deputy (as defined in the **Basics** tab), but delivered to you personally. Nor is an absence notification sent to the sender. All other e-mails are handled as defined in the **Basics** tab.

b) Exceptions for sender addresses **and** mail contents.

Under **Checking mode**, select the **Check sender and content** option if, based on specific contents in the message body or the subject, mails are to be forwarded to another deputy or not forwarded at all.

Example

Scenario: During your absence, you receive private e-mails marked accordingly with the term "private" in the Subject field. You not want these mails to be forwarded to your deputy, but the senders are to be notified of your absence.

Proceed as follows to set up this scenario:

In order not to have to enter every potential sender in the list, you can exclude all mails with the term "private" in the subject from being forwarded. In the description below, we will assume that you have already defined a deputy under the **Basics** tab (as described under Step 2 above) and that you have selected the **Advanced** tab.

- In the **Checking mode** field, select the option **Check sender and content**.
- Next to **Control for Exceptions** click on the icon **New** for a new entry. The following dialog box appears:
 The **Field for content** is pre-set to **Subject**, i.e. the content specified will be searched for in the mail's subject. Click on the arrow to select **Body** instead of **Subject** (the content will then be searched in the message body). For our scenario, **Subject** is the appropriate setting.
- You can now specify the text to be searched for in the mail's Subject field. Select the option **Do not forward - notify sender only** and, in the **Content** field, enter the word *private*.



The following placeholders are available to enter character strings:

- ▷ * (asterisk) = any character string. Examples: *hous** 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 lozenge) = any digit. Example: *Ha\#s* for instance finds *Ha1s* or *Ha3s*.
- Leave the **Sender** field empty.
- Click **OK**.
- In the upper menu bar, click on **Save**:

E-mails with the word *private* in the subject will not be forwarded to your deputy (as defined in the **Basics** tab), but delivered to you personally. At the same time, an absence notification, defined in the **Message for sender in case of none forward** field under the **Operations** tab, is sent to the sender. All other e-mails are handled as defined in the **Basics** tab



You can also combine contents with specific sender addresses or set up several entries with different contents or senders, some of which will check the mails for contents while others check the sender addresses or both. If, for a specific entry, you wish to check the sender address only, you can disable content checking for that entry by setting the **Field for content** option to **[No content checking]**. Individual entries can be called and edited with the **Edit** icon. The **Sort** icon is used to change the order of the entries. The first entry in the list is edited first.

5. Under the **Misc.** tab, use the **Document authors** field to specify who is authorized to edit this document and manage the forwarding settings. As under **Basics**, names can be selected from the Notes address book. The asterisk in the **Server** field means that the document is valid for all servers. Consult your Administrator before changing this entry!



6. For your and other persons' information, use the **Comments** tab to enter a short description of your document.
7. Finally, click on **Save** in the upper menu bar to save all of the document's settings:

5.5.2 Standard Forward

The standard forward options are set in a similar way as the [Advanced Forward](#) ones, the main difference being that there is no **Advanced** tab available for exceptions and that no other names may be entered in the **Forwarding for** field in the **Basics** tab.

To create a standard forward document select: **New Entry** → **Standard Forward**. As for Advanced Forward, set the dates and select a deputy/substitute from the address book. Then set the document to Active. Save your settings with **Save**



In the Standard Forward document, there is no Notes Address Book selection arrow in the **Document authors** field under the **Misc.** tab. But you also specify several document authors by entering the addresses manually in the field, separated by comma.

5.6 Setting up Redirections

As delivered, the iQ.Suite User Portal database contains two sample entries, one for advanced forwarding and one for a redirection document. As, in most cases, all users will have access to the iQ.Suite User Portal, these samples may have been changed and therefore no longer be available.

If that is the case, please select **New** → **Redirection** and create a new document. Use the example below as guideline. Once you have created the new document, you can edit and update it any time by selecting it from the list (double-click).

For further information on individual fields and their options, click on **Help** to call the online help.

1. Select **Clerk Absence Management** → **By User**

For	To	Period	Status	Messages
Paris, Mark	Washington, Bob	24.04.2006 - 28.04.2006	Not active	I am out of office until 28.04.2006, please deal with my mail
London, Kai	Washington, Bob	24.04.2006 - 28.04.2006	Not active	I am out of office until 28.04.2006, please deal with my mail
Goose, Jack	Chicken, Henry		Not active	Please inform me about important contents

From the list displayed next, select (double-click) Jack Goose and change the document (→ **Edit**).

2. In the **Basics** tab, set the **Status** option to **Active**.

The settings in the **Basics** tab apply whenever an incoming e-mail is not covered by **Exceptions** defined under the **Advanced** tab.

Basics | Operations | Advanced | Misc. | Comments

Basics

Status Active Not active

Redirection for

Redirect e-mails Yes No

Redirect to

- a) In the **Redirection for** field²¹, enter the name of the user whose e-mails are to be redirected. If you have created a new document, the name proposed will be your own name. But you can select any other name from the Notes Address Book.
- b) Set the **redirect e-mails** field to **Yes**; this will make the **Redirect to** field visible and allow to specify a deputy. If you set this field to **No**, the e-mails will not be redirected except for in the cases defined as **Exceptions** under the **Advanced** tab. This allows to redirect only e-mails from specific senders to selected persons or groups.
- c) Then enter the deputy in the **Redirect to** field. You can also select one or several names from the Notes Address Book. Click on the arrow to open the Names selection window:

3. Select **Operations**.

Basics | Operations | Advanced | Misc. | Comments

Operations

Redirection message

The **Operations** tab is used to define the only message available with Redirection. This message is sent to the original recipient's deputy/substitute. It can be used to inform your deputy that the e-mail was redirected and that you wish to be contacted in urgent cases. Each new redirection document contains a standard message, which you can use as it is.

4. Now, in the **Advanced** tab, specify any **Exceptions** you may wish to define.

Basics | Operations | Advanced | Misc. | Comments

Advanced

Exceptions


Checking mode Check sender only Check sender and content

Controls for Exceptions

Field for content	Content	Sender	Redir
[No content checking]	[All]	friend@private.com	[Do not]
Subject	"Emergency"	[All]	[Do not]
[No content checking]	[All]	Donald Bull	Mary S

21. Die Bedeutungen der Felder innerhalb der Registerkarten finden Sie in der Online-Hilfe, wenn Sie auf **Help** klicken.

The redirection exceptions are defined similarly to forwarding exceptions, refer to Section [“Advanced Forward” on page 20](#) definiert.

 The redirection mode options are limited to **Redirect to** and **Do not redirect**. A "Do not redirect - notify sender" option, comparable to the corresponding Advanced Forward option, is not available as senders are never notified of a redirection.

5. Under the **Misc.** tab, use the **Document authors** field to specify who is authorized to edit this document and manage the redirection settings²². As under **Basics**, names can be selected from the Notes address book. The asterisk in the **Server** field means that the document is valid for all servers. Consult your Administrator before changing this entry!



6. For your and other persons' information, use the **Comments** tab to enter a short description of your document.
7. Finally, click on **Save** in the upper menu bar to save all of the document's settings:

5.7 Setting up Quarantine Access for Deputy

If, within your company, iQ.Suite is used to check incoming e-mails for spam, the users are likely to receive summary notifications on their quarantined e-mails²³. Any e-mail that is not delivered is stored in the Quarantine (a Notes database). If you have set up a deputy/substitute who is to receive these summary notifications during your absence²⁴, you may wish to enable this deputy/substitute to access the Quarantine in order to edit any e-mails wrongly quarantined. To do so, set up a corresponding document for Quarantine access²⁵. Depending on the access rights to the database, you may create an advanced document and/or a standard document.

1. In the iQ.Suite User Portal under **Clerk Absence Management**, select **Substitute for Quarantine Access**.
2. In the menu bar, click on **New** and select **Substitute Quarantine Access (Advanced)**. If you do not have sufficient rights for the advanced document, open the standard document, which is nearly identical.



22. If you need assistance on rights, please contact your Administrator.

23. siehe dazu [“Notification on Quarantined Spam Mails” on page 7](#)

24. siehe dazu [“Advanced Forward” on page 20](#)

25. Der Administrator muss dazu auch die Funktion **Zugriff auf Clerk-Quarantänedokumente** im Job freigeschaltet haben!

- In the **Basics** tab, specify the person whose substitute is to have access to the quarantined e-mails:

Clerk Substitute Quarantine Access (Advanced)

Basics Misc. Comment	
Basics	
Status	<input type="radio"/> Active <input checked="" type="radio"/> Not active
Mode	<input type="radio"/> Redirection <input checked="" type="radio"/> Forward
Access for	<input type="text" value="John Smith"/>
Access to	<input type="text" value="Mary Miller"/>



In the standard document, the person whose substitute is to have access to the quarantined mails is determined by the logon name and cannot be changed.

- Set the **Status** field to **Active**.
 - In the **Mode** field, set whether the deputy for redirected mails or the one for forwarded mails is to have access to the Quarantine.
 - In the **Access for** field, enter the person whose Quarantine may be accessed by a deputy. Click on selection arrow to select the user from the Notes address book.
 - In the **Access to** field, enter the deputy for your Quarantine documents. Click on selection arrow to select the deputy from the Notes address book.
- Under the Misc. tab, you can specify additional Document authors, i.e. persons who are authorized to modify the document.

Clerk Substitute Quarantine Access (Advanced)

Basics Misc. Comment	
Misc.	
Document authors	<input type="text" value="%Admin%"/>

- Finally, click on **Save** in the upper menu bar to save all of the document's settings:

As soon as this function has been enabled by your Administrator, your substitute/deputy will now have the right to access quarantined e-mails directly from the summary notification and to view your quarantined documents through the **Quarantine** menu in the iQ.Suite User Portal.

6 Appendix - Delayed Sending with iQ.Suite Smart

6.1 Basics

Do you want to hold back specific messages addressed to multiple recipients and send them at a later time? In addition to the functions offered by the iQ.Suite User Portal, the iQ.Suite Smart module provides a possibility for delayed sending.

The messages to be deferred are temporarily buffered and then sent to the mail server at the date and time specified. All that is required is a valid license for iQ.Suite Smart²⁶.

Dieses Kapitel erklärt Ihnen, wie Sie als Benutzer die Funktionen von iQ.Suite Smart nutzen können.

6.2 Delayed Sending of E-mails

You can send e-mail on particular days and/or times of day. You might, for example, want to send a message on a particular day (offers, birthday greetings, etc.), but are not in the office on that day. You can nonetheless send the message immediately with an instruction in the header that it is to be sent by the mail server on day X at time Y. This instruction is in the form of a keyword. The keyword for user defined delays is `<DELAY %PATTERN%>`. For %Pattern%, enter the number of minutes by which the message is to be delayed or the time and date on which the message is to be sent. Depending on the server setting selected by your Administrator, one of two options will be available:

6. Delay by interval

If the Administrator has enabled the **Interval delay** option, the document is sent after of the specified number of hours and minutes. The delay interval has to be entered with leading zeros in the Subject line, e.g. for a 1-hour delay → `<DELAY 01:00>`, where the two digits preceding the colon represent the hour and the other two the minutes. In other words, enter the keyword `DELAY`, then a blank, and finally:

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

The entire instruction has to be surrounded by angle brackets.


7. Send at fixed time


If the Administrator has enabled the **Send at fixed time** option, the document is sent at the time set by the user. If the time specified lies in the past, the message is automatically sent on the following day at the time set. The time has to be entered in the Subject line with leading zeros, e.g. to send at 1:00 a.m. → `<DELAY 01:00>`, again with two digits for the hour and two digits for the minutes.

Possible formats:

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

26. see also ["License Agreement" on Page 2](#)

 For the user, the entry in the Subject line is the same for both options: the mail is either delayed by 1 hour or sent at 01:00 a.m. The action actually executed depends on the option set by the Administrator at the server. Please ask your Administrator for information on the current Smart settings and the options available to you!

 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), without blanks.



As a rule, it is always possible to use both delay options - fixed time **and** by interval.