



FOR LOTUS NOTES 5 AND 6

Editor's Note

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Contents

1	Introduction	1
1.1	Your New iQ.Suite Portal	1
1.2	Copyright	1
1.3	Warranty	1
1.4	License Agreement	2
1.5	Third-Party Copyright Notes	2
1.6	Purpose of a Manual	2
1.7	Structure of the Manual	3
2	General	5
2.1	What is the iQ.Suite Portal?	5
2.1.1	User-specific Quarantine Access	5
2.1.2	White/Blacklist Management	5
2.1.3	Absence Management	5
2.2	Opening iQ.Suite Portal Using Notes Client	5
2.3	Opening iQ.Suite Portal Using Web Browser	6
2.4	iQ.Suite Portal Database User Interface	7
2.5	Terminating the iQ.Suite Portal	8
3	Absence Management	9
3.1	Basics	9
3.2	Deputies	9
3.3	Menu: Delegations	11
3.3.1	Rights within Menu	11
3.4	Organizing Deputies for Holiday and Sickness Leave	11
3.4.1	Advanced Forward	11
3.4.2	Standard Forward	17
3.5	Redirections	17
3.6	Setting Up the Electronic Secretariat	18
3.7	Setting up Quarantine Access for Deputy	20
4	User-specific Quarantine	23
4.1	What is the Quarantine?	23
4.2	Notification on Quarantined Spam Mails	23
4.3	Opening the Quarantine	24
4.3.1	Procedure	24
4.3.2	Opening a Specific E-Mail	24
4.4	Adding an Address to a White/Blacklist	24
4.5	Available Options	25
5	Whitelists and Blacklists	29
5.1	What are Whitelists and Blacklists?	29

- 5.2 Opening a Whitelist or Blacklist 29
 - 5.2.1 View by Category 29
 - 5.2.2 View by Sender 31
- 5.3 Adding a Sender to a Whitelist..... 31
 - 5.3.1 Creating a New Whitelist Entry Manually 31
 - 5.3.2 Writing an E-Mail to the Communication Partner 33
 - 5.3.2.1 Whitelist entry including sending the mail..... 33
 - 5.3.2.2 Whitelist entry without sending the mail..... 33
- 5.4 Adding a Sender to a Blacklist 33
- 5.5 Removing an Address from a Blacklist or Whitelist..... 34
 - 5.5.1 Removing an Entire Black/Whitelist Entry 34
 - 5.5.2 Removing an Individual Sender Address 34
- 6 Appendix - iQ.Suite Smart 37**
 - 6.1 Basics 37
 - 6.2 Delayed Sending of E-Mails..... 37

1 Introduction

1.1 Your New iQ.Suite Portal



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

You will be periodically informed of newly quarantined e-mails and provided access to your Quarantine. Mails classified as spam can still be viewed or sent to your mailbox after all - no message is lost.

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

In addition, the Portal allows to set up various absence handling rules, with mails redirected or forwarded to substitutes while ensuring that no unauthorized persons are given access to your mailbox.

Good luck with your iQ.Suite Portal!

Your GROUP Technologies Team



1.2 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 1992-2005 GROUP Technologies AG, all rights reserved.

1.3 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.

1.4 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 Third-Party Copyright Notes

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1.6 Purpose of a Manual

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

manual@group-technologies.com

1.7 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.

2 General

2.1 What is the iQ.Suite Portal?

The iQ.Suite Portal is a Notes database integrated in the **iQ.Suite for Domino** administration software. The iQ.Suite 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 chapters.

2.1.1 User-specific Quarantine Access

The user-specific Quarantine displays a list of all e-mails that were identified as spam and therefore blocked. These mails were moved to the Quarantine. In the Quarantine view, you have the possibility to retrieve selected e-mails or to place individual senders on a whitelist or blacklist.

2.1.2 White/Blacklist Management

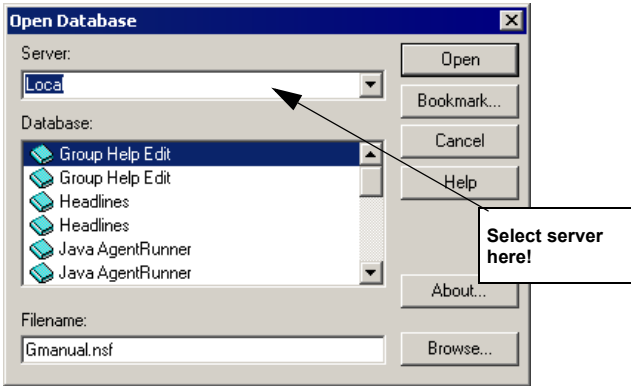
Whitelists are used to define trustworthy senders, i.e. whose mails are not to be checked for spam. On the other hand, mails from senders found on a blacklist are immediately discarded, i.e. never delivered.

2.1.3 Absence Management

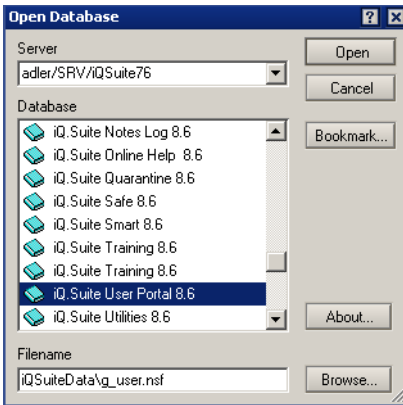
For a freely configurable period of time, your electronic mail can be forwarded to selected persons or groups. E-mails from different senders or Internet domains can be forwarded or redirected to different substitutes. For confidential information, forwarding or redirection can be disabled. Where required,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

2.2 Opening iQ.Suite Portal Using Notes Client

Start your Notes client and open the iQ.Suite Portal database (**g_user.nsf**) as follows: Click on **File → Database → Open** and then select the server that hosts the current iQ.Suite Portal database.



For the name of the server (and the corresponding directory on the server), please consult your Administrator. Then select iQ.Suite Portal 8.5 (for Notes 5) or 8.6 (for Notes 6) database and click on **Open**.



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.

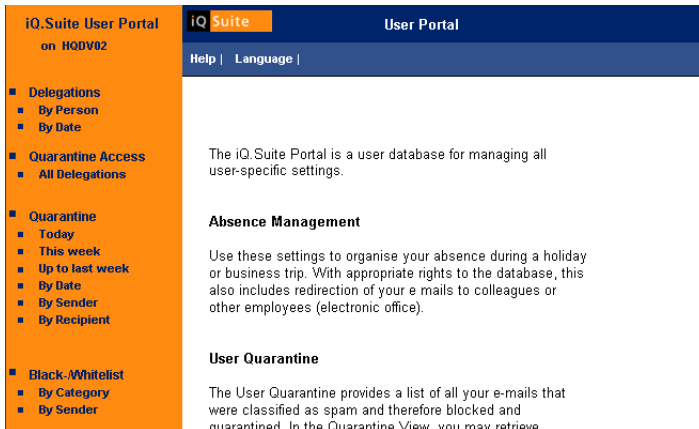
2.3 Opening iQ.Suite Portal Using Web Browser

Instead of the Notes client, you may also use a web browser to open the iQ.Suite 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 help.

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 Portal Database User Interface

After having opened the database, the following screen appears:



Click on **Language** to select your preferred language. Most of the screen elements will be displayed in that language.

Further information about all 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**.

Underneath iQ.Suite User Portal label, you will find the name of the server hosting this portal.

On the left, a menu is displayed with the following items

- **Delegations**
- **Quarantine Access**
- **Quarantine**
- **Black-/Whitelist**

The submenu items (e.g. **By Person**) call different views of the same contents in order to present the specific information searched for more rapidly.



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

2.5 Terminating the iQ.Suite 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 Absence Management

3.1 Basics

The Absence Management functionality (forwarding and redirection) is handled by the iQ.Suite Clerk module, which consists of two components: The first component is the administration module, managed by the Domino Administrator on the server. The second component, the separate iQ.Suite Portal database (**g_user.nsf**), can be used to set up user-specific substitutes and forwarding settings (depending on rights)¹.

Functionality (for a user 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.
-  Disable forwarding for critical or encrypted e-mails and for specific senders.
-  Reading confirmation from substitute to absentee.
-  Central overview of all absences for authorized users.
-  Restricting internal and external forwarding to a group of authorized persons.
-  Freely editable notification messages with %variables% for sender and substitute.

3.2 Deputies

The absence management system is designed to handle holiday and sickness leaves or business trips. You may 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 you have defined. This copy will be 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

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

the e-mail will automatically receive a notification that you are currently not available at your company.

The following can be configured as required:

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

The control documents can be viewed and edited by others (e.g. by the secretary), provided they are authorized to do so (refer to Section "[Rights within Menu on page 11](#)"). 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 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 a more detailed description, please refer to Section "[Organizing Deputies for Holiday and Sickness Leave on page 11](#)" and Section "[Setting Up the Electronic Secretariat on page 18](#)".

There are two types of forwarding:

- A standard forwarding document:
 - is for an individual person (the author!),
 - goes to one or several substitutes simultaneously (notice of absence without forwarding is possible),
 - sets the forwarding period in days,
 - sets the texts (messages),
 - enables to manually specify further persons as authors (separated by comma!).
- An advanced forwarding document:
 - has all the functions of the standard document,
 - additionally enables to define forwarding/deputy exceptions for specific senders,
 - allows to select document authors from the Notes Addressbook,
 - allows to set forwarding options for other persons.

3.3 Menu: Delegations

In the left-hand menu bar, click on **Delegations --> By Person**:

The screenshot shows the iQ.Suite User Portal interface. On the left is a navigation menu with options: Delegations, By Person, By Date, Quarantine Access, and All Delegations. The main content area displays a table of delegation records.

For	To	Period	Status	Messages
Jack Goose	Henry Chicken	---	Not active	Please inform me about important conde...
Kai London	Bob Westington	07/18/2004 - 07/28/2004	Not active	I am out of office until 28.07.2004. Plea...

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

3.3.1 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 **Personal Settings - By Person** and **Personal Settings - 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/deputy. These documents can be viewed by double-clicking them; however, only the author may change a document². Authorized users³ may view all forwarding and redirection documents.

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

3.4 Organizing Deputies for Holiday and Sickness Leave

If you want to set up a deputy/substitute to handle a holiday or sickness leave, you must configure and activate the Personal Settings. You then have the choice between standard and advanced forwarding.

3.4.1 Advanced Forward

Access to advanced forwarding options is restricted to authorized users.

As delivered, the iQ.Suite Portal database contains two sample entries for personal settings. As, in most case, all users will have access to the iQ.Suite Portal, these examples may have been changed and therefore be no longer available.

2. Author in Lotus Notes = creator of the document
3. Authorized user = user with extended rights

In such a case, please select **New Entry --> 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: **Personal Settings --> By Person**

For	To	Period	Status	Messages
Jack Goose	Henry Chicken	----	Not active	Please inform me about important contents
Kai London	Bob Washington	18.07.2001 - 28.07.2001	Not active	I am out of office until 28.07.2001. Please deal with my mail.


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

2. In the **Basics** tab, set the personal settings to **Active**.

Basics | Operations | Advanced | Misc. | Comments


Basics


Status Active Not active


Absence profile for Kai London
 Mark Paris 

Start at

Up to and including

Forward e-mails Yes 

Forward to Bob Washington 

Sender notification mode Always notify 

Click on arrow to select a name

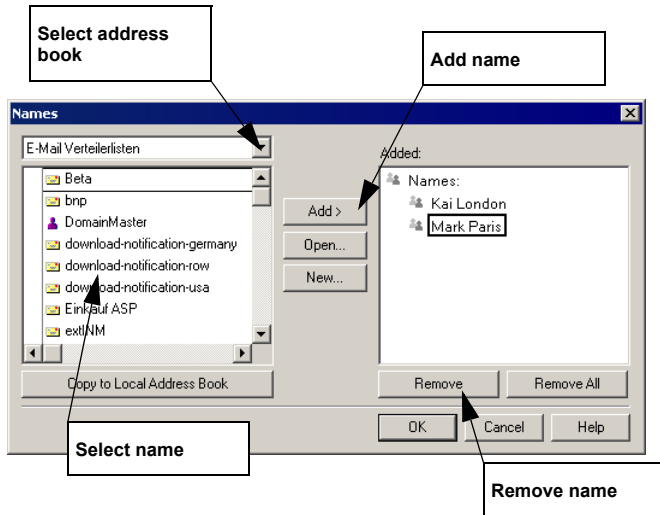
For the users Kai London and Mark Paris, Bob Washington will be the substitute from 18.07.2004 to 28.07.2004. The sender of any e-mail forwarded will always be informed. Use these fields to change the user names for which forwarding is to be set up and to specify a substitute for the period of time defined.

The **Forward to** field is not visible if you have selected **No** under **Forward e-mails**. In this case, e-mails will not be systematically forwarded, but the actions defined under **Exceptions** in the **Advanced** tab will be executed.

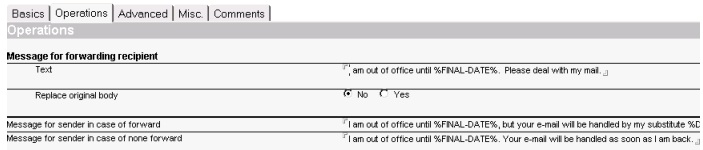
The **No - notify sender only** option has the same effect, but the sender of

the e-mail additionally receives a notification as set in the **Message for sender in case of non-forward** field under the **Operations** tab. This functionality can be used to set up an automatic absence notification system without forwarding enabled.

You may select several names from the Notes Addressbook as forwarding recipients. After having clicked on the arrow, freely select or remove names from the list displayed:



3. Now select **Operations**.



The fields in the **Operations** tab are used to specify the message to be sent to the forwarding recipient (added to the original mail) as well as the message to be sent to the sender. The sender notification is sent as separate mail. Customize the settings to your requirements, define new messages or simply use the default values.



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** fields will automatically be taken into account in the text.



The placeholder %DEPUTY% is replaced with the forwarding address, with multiple entries separated by comma. If the mail is to be forwarded to a Notes user, specify his Internet address; otherwise the sender will receive an address he will be unable to send a message to!



If you do not want the original message text to be available to your deputy, set the **Replace original body** field to **Yes**. Your deputy then receives your messages only with the subject and your own message text. Keep in mind, however, that this makes it impossible for your deputy to reply to the message.

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

Basics Operations Advanced Misc. Comments	
Advanced	
Exceptions	
Sender	Forward to
<input type="checkbox"/> Leo Miller <input type="checkbox"/> Customers <input type="checkbox"/> Suppliers	<input type="checkbox"/> John Miller <input type="checkbox"/> Heidi Klum <input type="checkbox"/> Mary Smith
Do not forward - notify sender only	
<input type="checkbox"/> friend@private.com	
Do not forward - do not notify sender	
<input type="checkbox"/> newsletter@company.com	

Use the **Sender** field to define exceptions from the rule, i.e. to have e-mails from these senders forwarded to other persons. An entire domain is entered as follows: *@domain.com, where the asterisk (*) replaces any number of characters. Thus, this example covers all mails from the domain "domain.com".

In the example above, the following exceptions were defined:

- a) E-mails from *Leo Miller* go to John Miller.
 - b) E-mails from the *Customers* group go to Heidi Klum.
 - c) E-mails from the *Suppliers* group go to Mary Smith.
 - d) E-mails from *friend@private.com* are not forwarded; the sender simply receives an automatic absence notification, as set in the **Message to sender in case of non-forward** under the **Operations** tab.
 - e) E-mails from *newsletter@company.com* are not forwarded, but delivered to you personally. The sender is not sent an absence notification.
- All other e-mails are handled as set under the **Basics** tab!



Use the **Do not forward - notify sender only** and **Do not forward - do not notify sender** fields to disable forwarding for specific senders. The mails from these senders will then be delivered to you in any case. This option could, for instance, be used if you expect a confidential e-mail from a particular sender and do not want it to have someone else read it. In that context, you can set whether or not the sender is to be notified of your absence.



If you wish to disable forwarding notifications for all external senders, set up two documents: one for internal senders with notifications enabled, and one for external senders with notifications disabled (**Basics** tab, **Notify sender** → **Never**).



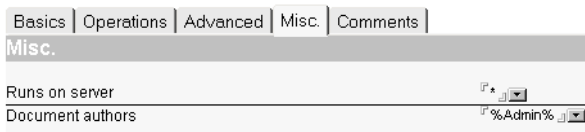
If, while you are absent, you wish to send a notification to the senders without forwarding their mails to a substitute:

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. Define the text to be sent to the sender in the **Message for sender in case of non-forward** under the **Operations** tab. The **Replace original body** must have been set to **No**.



4. Under the **Advanced** tab, define the **Exceptions** for the notification without forwarding, i.e. the senders who are not to be informed of your absence (e.g. mailing lists). In the **Do not forward - do not notify sender** field under **Exceptions**, enter the e-mail address of a person who is not to be notified. Multiple addresses have to be separated by a line break.

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 Addressbook.



In the Standard Forward document, a selection from the Notes Addressbook is not available. But you can nonetheless specify multiple document authors. To do so, simply enter the addresses manually in the **Document authors** field, separated by comma.

6. For your and other persons' information, use the **Comments** tab to enter a short description of your document.
7. Click on **Save** to save your settings.

3.4.2 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.



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

3.5 Redirections

The redirection function can be described as an "electronic secretariat" since the available settings go far beyond simple redirection.

Redirection is restricted to authorized users (refer to "[Rights within Menu](#)" on [page 11](#)).

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

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

As the mails are redirected, the original recipient does not receive a copy. Also, no notification is sent to the recipient or the deputy, as this will normally not be necessary with redirected e-mails. 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.

3.6 Setting Up the Electronic Secretariat

As delivered, the iQ.Suite Portal database contains two sample entries for personal settings. As, in most case, all users will have access to the iQ.Suite Portal, these examples may have been changed and therefore be no longer available.

If that is the case, please select **New Entry --> Redirection** 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: **Personal Settings --> By Person**

For	To	Period	Status	Messages
Jack Goose	Henry Chicken	---	Not active	Please inform me about important contents
Kal London	Bob Washington	18.07.2001 - 28.07.2001	Not active	I am out of office until 28.07.2001. Please deal with my mail.

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

2. In the **Basics** tab, set the Personal Settings to **Active**.

Basics | Operations | Advanced | Misc. | Comments

Basics

Status Active Not active

Redirection for

Redirect e-mails

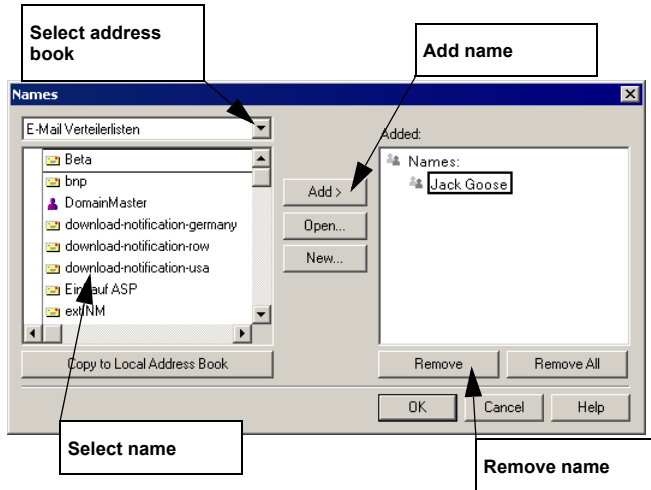
Redirect to

Click on arrow to select a name

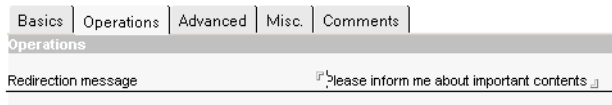
In the **Redirection for** field, enter the name of the user whose mail is to be redirected. The substitute is specified in the **Redirect to** field. You may select the names from the Notes Addressbook. The **Redirect to** field is only visible if the **Redirect e-mails** field has been set to **Yes**. If this option is set to No, e-mails will not be systematically redirected, but the actions defined under **Exceptions** in the **Advanced** tab will be executed nonethe-

less. This functionality can be used to have only e-mails from specific senders redirected to selected persons or groups.

In the case of a systematic redirection, neither senders nor recipients will be sent notifications. Simply **Add** or **Remove** names from the selection displayed when you click on the arrow:



3. Now select **Operations**.



The **Operations** tab is used to define the only message available with Redirection. This message is sent to the user'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. Customize the settings to your requirements, define a new message or simply use the default values.

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

Basics Operations Advanced Misc. Comments	
Advanced	
Exceptions	
Sender	Redirection to
<input type="checkbox"/> Donald Bull	<input type="checkbox"/> Mary Smith
Do not forward for sender	
<input type="checkbox"/> friend@private.com	

Use the **Sender** field to define exceptions from the rule, i.e. to have e-mails from these senders forwarded to other persons. An entire domain is entered as follows: *@domain.com, where the asterisk (*) replaces any number of characters. Thus, this example covers all mails from the domain "domain.com".

In the example above, the following exceptions were defined:

E-mails from *Donald Bull* are redirected to Mary Smith. Although redirection is enabled (**Basics** tab), mails from *friend@private.com* are delivered to you.

- Under the **Misc.** tab, use the **Document authors** field to specify who is authorized to edit this document and manage the redirection settings. As under **Basics**, names can be selected from the Notes Addressbook. Please do not change the setting in the **Server** field.

Basics Operations Advanced Misc. Comments	
Misc.	
Runs on Server	<input type="checkbox"/> *
Document authors	<input type="checkbox"/> Ralf Mollik/MA1/VP/GRUOP/De

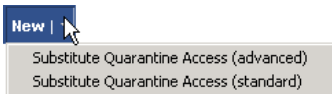
- For your and other persons' information, use the **Comments** tab to enter a short description of your document.
- Save your settings with **Save**.

3.7 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-mails⁴. If

you have set up a deputy/substitute who is to receive these summary notifications during your absence, you may wish to enable this deputy/substitute to access the quarantined e-mails. If you want to enable Quarantine access for your deputy, set up a corresponding document⁵. Depending on the access rights to the database, you may create an advanced document and/or a standard document.

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



3. In the **Basics** tab, specify the person whose substitute is to have access to the quarantined e-mails (**Access for**):

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	<input type="text" value="John Smith"/>	
Access to	<input type="text" value="Mary Miller"/>	



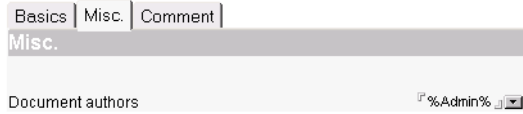
In the standard document, the person whose substitute is to have access to the quarantined e-mails cannot be changed, as it is the creator of this document.

Define the **Mode**. The sets whether the substitute will have access to forwarded or redirected quarantined e-mails. Specify the substitute for your

-
4. Refer to ["Notification on Quarantined Spam Mails" on page 23](#)
 5. This requires that the Administrator has previously enabled the **Clerk quarantine documents access** function in the job!

quarantined e-mails in the **Access to** field and set document status to **Active**.

4. Under the **Misc.** tab, you can specify additional **Document authors**, i.e. persons who are authorized to modify the document when required.



The screenshot shows a software interface with three tabs: 'Basics', 'Misc.', and 'Comment'. The 'Misc.' tab is selected and highlighted. Below the tabs, there is a field labeled 'Document authors' with a dropdown arrow. The dropdown menu is open, showing a list of users, with '%Admin%' selected.

5. Save the document with **Save**.

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.

4 User-specific Quarantine

4.1 What is the Quarantine?

iQ.Suite stores any mails identified as spam in the so-called **Quarantine**, where they remain until they are checked and/or deleted by an authorized user such as the Administrator. Typically, the Quarantine will be configured so that quarantined e-mails are automatically deleted after a given period of time.

The access provided by the iQ.Suite Portal enables the user to view the quarantined e-mails and deliver them after all where required⁶. 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 identical⁷.



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!

4.2 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 links and are directly opened in the Quarantine. Whether the e-mails are opened in the Notes client or 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.

-
6. To himself or others - depending on the rights to the database
 7. Also refer to ["Opening iQ.Suite Portal Using Web Browser" on page 6](#)

4.3 Opening the Quarantine

4.3.1 Procedure

1. Open the iQ.Suite Portal⁸.
2. Click on 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!

4.3.2 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.

4.4 Adding an Address to a White/Blacklist

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 the whitelist.

1. Open the iQ.Suite Portal⁹.
2. Click on a view underneath the **Quarantine** menu.
3. Select or open the desired mail.
4. Click on the **To my Whitelist** button.
5. Confirm the message box (**The following sender was added to your Whitelist**) displayed next with **OK**.

The selected sender address has thus been changed into a whitelist entry, which is automatically sorted into the existing Quarantine category¹⁰ under which the mail was categorized. Click on **To my Blacklist** if you want to add an address to your blacklist.

-
8. Refer to ["Opening iQ.Suite Portal Using Notes Client" on page 5](#)
 9. Refer to ["Opening iQ.Suite Portal Using Notes Client" on page 5](#)
 10. Refer to categories, ["View by Category" on page 29](#)

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 34](#).

4.5 Available Options

Help | Print | Deliver To Me | To my Whitelist | To my Blacklist | Resend | To global Whitelist | To global Blacklist

Help

Calls the context-sensitive online help on individual fields.

Print

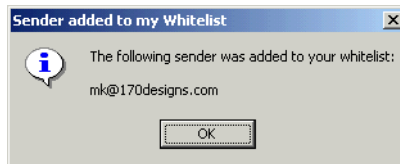
Prints the documents.

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.

To my Whitelist

The sender of the mail is added to the personal whitelist¹¹ 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** menu¹²).

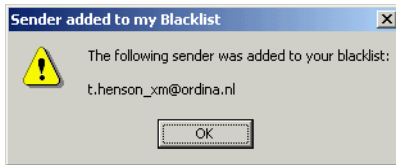
11. Refer to [“Whitelists and Blacklists” on page 29](#)

12. Refer to [“Whitelists and Blacklists” on page 29](#)



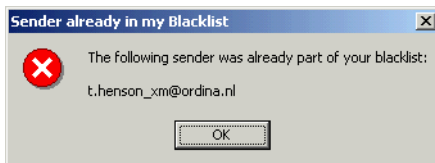
■ **To my Blacklist**

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** menu¹³).



13. Refer to ["Whitelists and Blacklists" on page 29](#)

 **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.

 **Deliver to Recipients**

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.

 **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.



If some of the functions are not available, you may not have appropriate rights to the iQ.Suite 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.

5 Whitelists and Blacklists

5.1 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.

Through the iQ.Suite Portal, each user is able to access and manage his personal whitelists/blacklists, e.g. to modify an existing one or to create a new whitelist/blacklist.¹⁴



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

5.2 Opening a Whitelist or Blacklist

1. Open the iQ.Suite Portal¹⁵
2. 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!

5.2.1 View by Category

The whitelist entries are displayed sorted by whitelist category. A whitelist category (or simply called category) consists of individual whitelist entries.

Example:

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

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

Click on the expansion arrow 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	Claudia
pulver_merlyn@swbell.net	CN=GÜ
webspherepower+arne.bergmann@group-technologies.co	Günthe

Double-click to open an individual whitelist entry:

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
Recipient type	User
Recipient address	#mail-in-sales@group-wp

This entry belongs to the category **SPAM-CORE (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 **mi@cyberoficina.com** addressed to the recipient **#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 (see ["User-specific Quarantine" on page 23](#)).



Do not move individual whitelist entries to other categories!

5.2.2 View by Sender

The whitelist entries are displayed sorted by sender domain (first divided into **Active/Not Active**). The corresponding address is displayed underneath the domain and the whitelist category underneath the address.



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

5.3 Adding a Sender to a Whitelist

Depending on your rights, there are different possibilities 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. For details, refer to description under ["Adding an Address to a White/Blacklist" on page 24](#).

5.3.1 Creating a New Whitelist Entry Manually

1. Open the iQ.Suite Portal¹⁶
2. In the upper menu bar, click on **New**.



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

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

'New Users Whitelist Entry'

Wall Black-/Whitelist Entry

Basics	
Black-/Whitelist	Users-WL
Status	<input checked="" type="radio"/> Active <input type="radio"/> Not active
Sender type	<input type="text" value="User"/>
Sender address	<input type="text"/>
Recipient address	Susanne Ludewig/TEC/GROUP/De

- Set the **Status** field to **Active**.
- 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.
- Enter the sender addresses in the **Sender address** field. Enter Internet addresses as follows: "user@domain.com". Addresses from the Notes Addressbook 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 Addressbook.

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!

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 blacklist category **Users-BL**. This category cannot be changed!



Use the **New Black-/Whitelist Entry** button to create global whitelist/blacklist entries. In this document, the recipient type can be freely set to **User**, **Domain** or **All** and it is possible to select any recipient address. Typically, this option requires extended rights.

5.3.2 Writing 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 now have to be enabled at the server!
Please consult your Administrator before using one of these options!

5.3.2.1 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.

5.3.2.2 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. Default: `###TOWHITELIST###`.

5.4 Adding a Sender to a Blacklist

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

1. Create a new blacklist entry manually

2. Add an address from the Quarantine. Refer to the description in Section [“Adding an Address to a White/Blacklist” on page 24.](#)

Proceed as described under [“Adding a Sender to a Whitelist” on page 31](#) and select either **User’s Blacklist Entry** (manual entry) or **To my Blacklist** (add from Quarantine).

5.5 Removing an Address from a Blacklist or Whitelist

5.5.1 Removing an Entire Black/Whitelist Entry

Removing addresses from a whitelist or blacklist requires appropriate rights to the database. Please contact your Administrator if you need 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 Portal¹⁷.
2. Click on a view underneath 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.

5.5.2 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 Portal.
2. Click on a view underneath the **Black-/Whitelists** menu.
3. Open (double-click) the desired whitelist entry. Then click on **Edit**. the following view is displayed:

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

Basics Comments	
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 ▾
Recipient type	All ▾

4. Select the name to be removed:

Basics Comments	
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 ▾
Recipient type	All ▾

5. Press the **Del** key:

Basics Comments	
Basics	
Black-/Whitelist	Blacklist Bad People ▾
Status	<input checked="" type="radio"/> Active <input type="radio"/> Not active
Sender type	User ▾
Sender address	Spammy Spammer ▾
Recipient type	All ▾

6. Click on **Save**. The sender address has been removed from the list.



6 Appendix - 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 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 Smart.¹⁸

This chapter explains in detail how to use the iQ.Suite Smart functions.

6.2 Delayed Sending of E-Mails

You can send e-mails on particular days and/or times of day. A user might, for instance, want to send an e-mail on a particular day (offers, birthday wishes, etc.), but knows he will be out of office on that day. He 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. This note is set by way of Delayed Sending keyword named `<DELAY %PATTERN%>`, where the %Pattern% metasymbol is replaced with the number of minutes the mail is to be deferred or with the time and date on which the mail is to be sent. Depending on the server setting selected by your Administrator, one of two options will be available:

1. 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 5 minute delay → `<DELAY 00:05>`, 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.

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

2. 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 0:05 → <DELAY 00:05>, again with two digits for the hour and two digits for the minutes.

Possible formats:

dd.mm.yyyy hh:mm	dd = day, mm = month, yyyy=year
dd.mm.yy hh:mm	dd = day, mm = month, yy=year
mm-dd-yyyy hh:mm	mm = month, dd = day, yyyy=year
mm-dd-yy hh:mm	mm = month, dd = day, yy=year
hh:mm	hh = hours, mm = minutes



For the user, the entry in the Subject line is the same for both options: the mail is either delayed by 5 minutes or sent at 00:05. The action actually executed depends on the option selected by the Administrator at the server.



When specifying a date, the time must also be entered. A date without time is considered invalid! When entering date **and** time, please be sure to insert the vertical line (pipe), without blanks.



It is basically possible to use both delay options - fixed time **and** by interval.



Please check with your Administrator which Smart settings are enabled and which options are available!