



Documentation

The iQ.Suite Absence Management

Forwarding or redirecting emails to a deputy in case of vacation, business travel or part-time employment.

Access via Notes client

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1 The 'Absence Management' Category

1.1 What is Absence Management?

The absence management is part of the iQ.Suite User Portal of the email management software *iQ.Suite for IBM Domino*¹.

With the absence management you can forward your emails to a deputy (e.g. due to vacation, business travels or part-time employment). During the defined time period, the emails addressed to you are forwarded to one or several co-workers. The email senders and co-workers can be informed about the forwarding. To prevent emails of certain senders from being forwarded, e.g. due to confidential information, you can define exceptions. In regular forwarding documents, it is additionally possible to configure that calendar entries are to be automatically created for the forwarding period and that Info emails notifying of the future absence are to be sent in advance.

To forward your emails permanently to a deputy or assistant, you can create a so-called redirection.

Potentially, you can not only define forwardings and redirections for yourself but for other users as well. For this, your administrator must grant you special access rights.

1. This is a software from the manufacturer GROUP Business Software. Refer to www.gbs.com.

1.2 Functions in the iQ.Suite User Portal

The screenshot shows the iQ.Suite User Portal interface. On the left is a navigation menu with 'Absence Management' and 'Quarantine' categories. The main area displays a table of forwarding orders with columns for 'For', 'To', 'Quar. Acc.', and 'Period'. The table contains five rows of data.

For	To	Quar. Acc.	Period
Boris Zidane	Michael Blum	→	----
Anna Glenn	David Galler	☀	20.12.2012 12:00
Kai Baron	Elena Martin	☀ ✓	04.02.2013 00:00
Julie Bonet	David Galler	→ ✓	----
Robert Fontane	David Galler	☀ ✓	----



The ABSENCE MANAGEMENT category is divided into several subcategories (e.g. BY USER) to switch between different views and sorting options on the available forwarding or redirection orders.

Select the desired subcategory under ABSENCE MANAGEMENT. The screen displays all forwarding or redirection orders either created by yourself or in which you are defined as deputy. Double-click on an order to open and edit it.



Usually, the following functions are available:

IQ.SUITE CLERK

Provides information on the database currently selected. If your administrator has defined more than one database, you can switch from one database to another by clicking on NEXT DATABASE.

PRINT

Prints the current view.

ACTIVATE

The selected forwarding or redirection order is enabled. Your emails will be forwarded or redirected according to your configuration.

■ DEACTIVATE

The selected forwarding or redirection order is disabled. Your emails will not be forwarded or redirected regardless of your configuration.

■ NEW -> FORWARD


Creates a regular forwarding order. Refer to [“Setting up Regular Forwarding” on page 7.](#)

■ NEU -> FORWARD (PERIODIC)

Creates a periodic forwarding order. Refer to [“Setting up Periodic Forwarding” on page 14.](#)

■ NEU -> REDIRECTION

Creates a redirection order. Refer to [“Setting up Redirection” on page 17.](#)

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



Please note that you need special rights to access all of the described functions. Please contact your administrator for assistance.

1.3 Forwarding vs. Redirection

The absence management can be used for the following actions:

1.3.1 Regular Forwarding

Configure a regular forwarding if your absence is limited to a certain time period, e.g. in case of vacation or business travels. Before the first day of your absence, create a forwarding order, in which you specify the desired deputy and the period of time for your absence (date, time).

Email forwarding is automatically triggered on the first day of your absence. The original email is sent to your mailbox while your deputy receives an email copy. To inform the email sender about the forwarding you can write an out-of-office reply

including the name of the new contact person. The email copy for your deputy can contain a notification as well, e.g. an order for handling your email. Calendar entries can be automatically created for the absence period. Info emails notifying of the future absence can be sent in advance.

Please find a description for configuration under ["Setting up Regular Forwarding" on page 7](#).

1.3.2 Periodic Forwarding

Especially part-time employees who are not available on certain days of the week and/or certain times benefit from this kind of email forwarding. To ensure that time-critical emails are handled quickly, the emails addressed to a part-timer can be forwarded to a deputy. Please find a description for configuration under ["Setting up Regular Forwarding" on page 7](#).

1.3.3 Retroactive Forwarding

The retroactive forwarding is a supplement for email forwarding or redirection. Without use of the retroactive forwarding, emails are delivered to a deputy not before an authorized user has arranged a redirection or forwarding in iQ.Suite Clerk. In the case a redirection or forwarding is only enabled at the 3rd day of the user's absence, the emails of the two days before are not available for the deputy. By use of the retroactive forwarding, this gap is closed.

If a retroactive forwarding is arranged, the original recipient receives a summary notification with all emails that were forwarded retroactively. In addition, the user can request a forwarding summary that lists all forwarded emails (FORWARDING SUMMARY button).

In case retroactive email processing is activated, **retroactive sender notifications** can be sent as well. The sender receives a notification for a past time period – no matter whether the email has been forwarded retroactively.

1.3.4 Redirection

Establish a redirection to assign all your incoming emails permanently to a deputy. In contrast to email forwarding the deputy receives the original email instead of an email copy. Your mailbox is not charged since you do not receive a copy of the email. A redirection can be established, for example, for a managing director to redirect the emails addressed to him, to an assistant or the office of the general manager. The email senders are not informed of the redirection. Also in case of collaborative usage of public folders, a redirection might be reasonable.

Example: A user has entered his/her email address in a mailing list. Emails received from this list are to be stored in a public folder instead of being delivered to his/her mailbox. Since the sender is a mailing list, you may not want to send a notification to the sender. Please find a description for configuration under ["Setting up Regular Forwarding" on page 7](#).

1.4 General Configurations

1.4.1 Setting up Regular Forwarding

The following section describes how to set up regular forwarding (e.g. in case of vacation, business travels etc). In the example, *David Galler* is defined as deputy for the user *Anna Glenn*.

1. Click on CLERK -> ABSENCE SETTINGS BY USER -> NEW -> FORWARDING:

Clerk Absence / Forward

Settings | Notifications | Exceptions | Misc. | Comments

Settings

Description

Status Active Not active

Absence profile for

Start at Specify times

Up to and including

Retroactive email processing should be used

Forward emails

Forward to

Non-forwarding deputy

Use for quarantine access Yes No

Calendar Settings

Create calendar entries Yes No



Please note that some options and fields may not be visible for you, depending on the configuration of your iQ.Suite Administrator.

- Optionally, you can enter a short description of the document.
If you leave the **Description** field empty, the address specified in the **Forward to** field is automatically entered.
- Set the **Status** to 'Active'.
- Under **Absence profil for**, your own name is generally selected. With special rights, you can select the name of a co-worker from the Notes address book. For all selectable user names you can create a forwarding, e.g. in case of the user's illness when the user is unable to create a forwarding for himself/herself.

- d) Use the calendar function under **Start at** and **Up to and including to** define the period of time in which the emails are to be forwarded. If required, set up a forwarding to the minute. For this, enable the 'Specify times' option under **Start at** and specify the starting time and end time for the forwarding. In the example, Ms Glenn works half-day on the first day of the forwarding. Therefore, her emails are forwarded not before 12:00 PM. On December 7, 2014 at 12:00 AM (midnight) the forwarding to David Galler is stopped.
- e) Keep the default settings for the time zone.
- f) The **Retroactive email processing** field might be not visible. If this option is displayed, you can forward emails to a deputy that are already available in your mailbox. The email remains in your mailbox but your deputy receives an email copy. In case retroactive email processing is activated, **retroactive sender notifications** can be sent as well. The sender receives a notification for a past time period – no matter whether the email has been forwarded retroactively.

Example 1: Before your vacation you were unable to cope with all time-critical emails. In order to forward all emails from yesterday and today to your deputy, activate the 'should be used' option under **Retroactive email processing** and select the date from yesterday under **Start at**.

Example 2: You have forgotten to establish a forwarding and inform your co-worker about the missing forwarding order on the second day of your business trip. When your co-worker is allowed to select your name from the Notes address book under **Absence profil for**, he can establish a forwarding for you. To configure that your deputy also receives the emails of the first and second day of your absence, your co-worker can establish a retroactive forwarding by entering the first day of your business trip in the **Start at** field. Please note that the complete email communication of the last two days is forwarded retroactively.



When the date under **Start at** is in the past, always activate the option for retroactive email processing.

- g) Under **Forward emails**, select 'Yes'.
- h) Under **Forward to**, select your deputy from the Notes address book.
- i) **Non-forwarding deputy**

You can use this field to specify a contact person. If a placeholder for the deputy is used in the notifications (e.g. %DEPUTY%), the placeholder will be replaced with the name(s) specified in this field.

The contact person(s) specified here will also be used in case 'non-forwarding is defined as an exception' and in case of 'retroactive email processing without forwarding'.

You can select the deputy from the Notes address book or enter the name manually. The non-forwarding deputy does not need to be entered in the address book. In case of several deputies, separate the entries by comma + blank.

Non-forwarding deputies are notified as deputies in case of Info emails, too.

Placeholders for deputies: refer to [Subject and Text](#).

- j) We recommend you to select under **Use for Quarantine Access** the option 'Yes'. With this, your deputy will not only receive all of the emails delivered to your mailbox, but he will also have access to the emails moved to your quarantine. This ensures that accidentally quarantined emails can be edited from your deputy. The deputy will be provided with a separate quarantine area (QUARANTINE -> SUBSTITUTE FOR QUARANTINE ACCESS). In the example, Mr Galler will be provided with a separate quarantine area in order to have access to the quarantined emails of Mrs Glenn.
 - k) The **Calendar Settings** section is visible and editable only if your iQ.Suite administrator has activated this section for your user. For further information on this feature, please refer to ["Settings for Calendar Entries" on page 18](#).
2. Open the **Notifications** tab. You may not have the right to edit all fields in this tab:

Settings	Notifications	Exceptions	Misc.	Comments
Notifications				
Message for forwarding recipient				
Subject	<input type="text" value="F %SUBJECT%"/>			
Text	<input type="text" value="F Ich bin abwesend bis einschließlich %END-DATE%. Bitte bearbeiten Sie meine E-Mail."/>			
Replace original body	<input checked="" type="radio"/> Yes <input type="radio"/> No			
<hr/>				
Allow sender notification	<input checked="" type="radio"/> Yes <input type="radio"/> No			
Message for sender in case of forward				
Subject	<input type="text" value="F Autoreply: %SUBJECT%"/>			
Text	<input type="text" value="F Ich bin abwesend bis einschließlich %END-DATE%, aber Ihre E-Mail wird von meinem S"/>			
Message for sender in case of non-forward				
Subject	<input type="text" value="F Autoreply: %SUBJECT%"/>			
Text	<input type="text" value="F Ich bin bis einschließlich %END-DATE% nicht im Haus, werde Ihre E-Mail aber sofort na"/>			
<hr/>				
Retroactive sender notification	<input checked="" type="radio"/> Yes <input type="radio"/> No			
Message for sender in case of forward				
Subject	<input type="text" value="F Autoreply: %SUBJECT%"/>			
Text	<input type="text" value="F Ich bin abwesend bis einschließlich %END-DATE%, aber Ihre E-Mail wird von meinem S"/>			
Message for sender in case of non-forward				
Subject	<input type="text" value="F Autoreply: %SUBJECT%"/>			
Text	<input type="text" value="F Ich bin bis einschließlich %END-DATE% nicht im Haus, werde Ihre E-Mail aber sofort na"/>			

- a) Under **Message for forwarding recipient**, write the **Text** for the out-of-office reply to be sent by default to the forwarding recipient (deputy). For example, enter a request for processing the forwarded email.

Subject and Text

Enter a subject in the **Subject** field. The following placeholders can be used:

- ▷ For the subject of the original email: %SUBJECT%
- ▷ For the deputy: %DEPUTY%, %CLERK%, %DELEGATE%, %VERTRETER%, %ADJOINT%.

The name of the deputy defined under **Forwarding to (Settings tab)** is identified and interpreted.

These placeholders are replaced at runtime with the current entries.

Several addresses are separated with a comma.

In the **Text** field, write the text for the out-of-office reply. The following placeholders can be used:

- ▷ %START-DATE%: Start date of the forwarding
%END-DATE%: Last day of the forwarding
- ▷ %START-TIME%: Start time of the forwarding
%END-TIME%: End time of the forwarding
- ▷ %START-ZONE%: Time zone for the start time
%END-ZONE%: Time zone for the end time

These placeholders are replaced with the current entries when saving the configuration document.

Contrary to the sender, the forwarding recipient does not receive any separate notification email. The text specified here is inserted into the original email.

- b) Under **Replace original body** select the 'Yes' option only if the deputy shall not be able to read the original message text of the email. In this case, the email contains only the original subject and the message text written under **Message for forwarding recipient**.

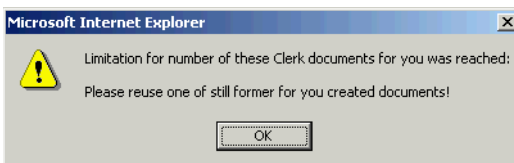
Please note that your deputy will be virtually unable to answer any of the emails if he/she does not know its content. If, in turn, your deputy has set up a forwarding (to a further person) with this option set to 'No', this further person will receive the email with both texts, i.e. with the original message and with the forwarding message defined above.

- c) With the **Allow sender notification** option, specify whether the sender can be notified by default when an email sent by him has been forwarded or not forwarded. This setting is also valid for the **retroactive sender notification**.
- d) Under **Retroactive sender notification**, specify whether the sender is allowed to be notified retroactively for emails he has sent in the past (e.g. 3 days before the forwarding document was activated).
- e) Under **Message for sender in case of forward**, define the sender notification for the regular case (without retroactive email processing). Under **Message for sender in case of non-forward**, define the retroactive sender notification. In both cases, different messages can be defined, depending on whether the email is forwarded or not. The message to the sender is sent as a separate email.

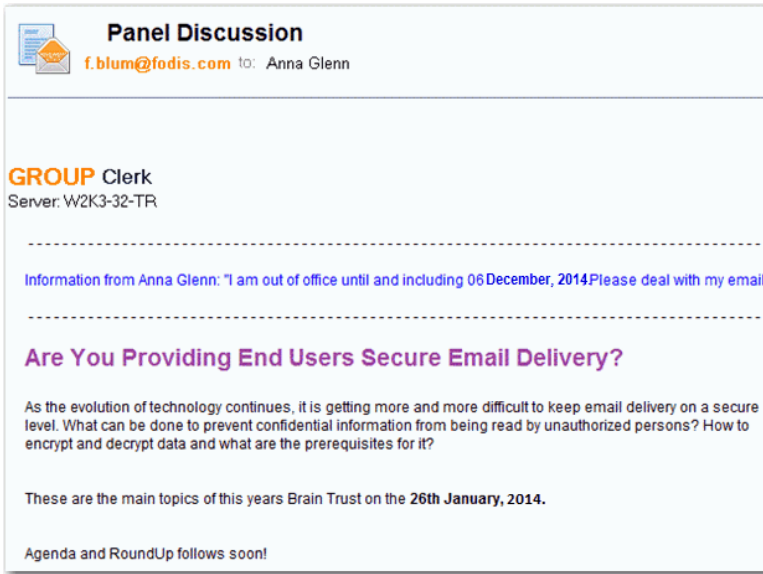
- ▷ With the message **in case of forwarding**, the out-of-office reply that is specified in the **Text** field is sent to the sender via email. It notifies the sender of the recipient's absence and, if appropriate, of the forwarding of the email to a deputy. By default, an out-of-office reply contains the subject "Autoreply" and the email's original subject text (%SUBJECT%).
- ▷ With the message **in case of non-forwarding**, the original sender can be notified of the recipient's absence. Besides the period of absence, a contact person/deputy can be specified.

Refer to [Subject and Text](#).

3. The **Exceptions** tab might be removed. If the tab is visible, you can configure exceptions for email forwarding. Refer to "[Configuration of Exceptions](#)" on [page 25](#).
4. The **Misc** tab might be removed as well. If the tab is displayed, under **Document authors** you can specify the persons, who are authorized to edit this forwarding order and manage the forwarding settings. The asterisk (*) in the **Runs on server** field means that the order is valid for all servers. Before changing the default settings, please consult your administrator!
5. Use the **Infomail** tab to make settings for sending Info emails. This is possible only if your iQ.Suite administrator has activated this feature for your user. For further information on this feature, please refer to "[Settings for Infomails](#)" on [page 21](#).
6. Save the forwarding order. If the following message appears, the maximum number of forwarding orders has been reached. The present order cannot be saved. Use an existing forwarding order instead and change the settings as required. Existing orders can be reused many times:



The example shows an email originally addressed to Mrs Glenn but forwarded to her deputy Mr Galler:



1.4.2 Setting up Periodic Forwarding

The following section describes how to configure a forwarding to a deputy in case of a periodic, regular absence (e.g. employees who are working part-time).



Please note that some options and fields may not be visible for you, depending on the configuration of your iQ.Suite Administrator.

Example 1

For the part-time employee *Anna Glenn*, a periodic forwarding shall be established. Mrs Glenn works from Monday to Friday from 08:00 AM to 12:00 PM. By experience, Mrs Glenn receives many emails that are critical in terms of time. Hence, emails that arrive between 12:00 PM and 06:00 PM are to be forwarded to the deputy *David Galler*.

Click on CLERK -> ABSENCE SETTINGS BY USER -> NEW -> PERIODIC FORWARDING:

Clerk Periodic Absence / Forward

Settings | Notifications | Exceptions | Misc. | Comments

Settings

Description: vL-periodic_AGlenn-To-DGaller

Status: Active Not active

Absence profile for: Anna GlennLndTestOrg

	Start date	End date	Time zone
	<input type="checkbox"/> Yes 23.11.2015 16	<input type="checkbox"/> Yes 23.11.2015 16	Local time
			from until
Monday	<input checked="" type="checkbox"/> Yes 12:00	<input type="checkbox"/> No 18:00	
Tuesday	<input checked="" type="checkbox"/> Yes 12:00	<input type="checkbox"/> No 18:00	
Wednesday	<input checked="" type="checkbox"/> Yes 12:00	<input type="checkbox"/> No 18:00	
Thursday	<input checked="" type="checkbox"/> Yes 12:00	<input type="checkbox"/> No 18:00	
Friday	<input checked="" type="checkbox"/> Yes 12:00	<input type="checkbox"/> No 18:00	
Saturday	<input type="checkbox"/> Yes 06:15	<input type="checkbox"/> No 16:15	
Sunday	<input type="checkbox"/> Yes 07:45	<input type="checkbox"/> No 17:45	

Forward emails: Yes

Forward to: David GallerLndTestOrg

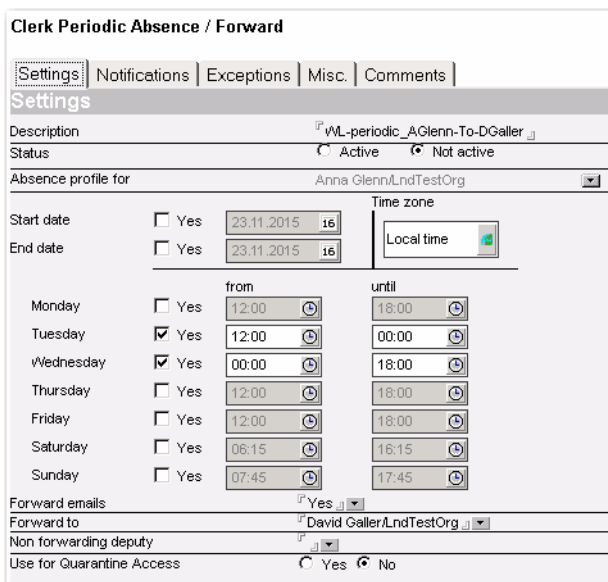
Non forwarding deputy:

Use for Quarantine Access: Yes No

Example 2

For the part-time employee *Anna Glenn* a periodic forwarding shall be established. *Mrs Glenn* works on Monday, Tuesday and Thursday from 08:00 AM to 12:00 PM and on Friday from 09:00 AM to 06:00 PM. On Wednesday he is usually not in the office. Hence, from Tuesday 12:00 PM to Wednesday 06:00 PM her emails are to be forwarded to the deputy *David Galler*.

1. Click on CLERK -> ABSENCE SETTINGS BY USER -> NEW -> PERIODIC FORWARDING:



Day	Yes	from	until
Monday	<input type="checkbox"/>	12:00	18:00
Tuesday	<input checked="" type="checkbox"/>	12:00	00:00
Wednesday	<input checked="" type="checkbox"/>	00:00	18:00
Thursday	<input type="checkbox"/>	12:00	18:00
Friday	<input type="checkbox"/>	12:00	18:00
Saturday	<input type="checkbox"/>	06:15	16:15
Sunday	<input type="checkbox"/>	07:45	17:45

- Optionally, you can enter a short description of the document.
If you leave the **Description** field empty, the address specified in the **Forward to** field is automatically entered.
- Set the **Status** to 'Active'.
- Under **Absence profil** for your own name is generally selected. Whith special rights, you can select the name of a co-worker from the Notes address book. You can create a forwarding for all selectable user names.

- d) Usually, no entries are required in the **Start date** and **End date** fields and can be left disabled. The fields are only relevant to limit the forwarding to certain weeks or months, which is normally not desired.
 - e) Keep the default settings for the time zone (**Local Time**).
 - f) In the fields of the weekdays define the time period of the absence. If you enable the option 'Yes' for a weekday, the user's emails (**Absence profile for**) are forwarded to the deputy (**Forward to**). The default setting from '00:00' to '00:00' (= '12:00 AM' to '12:00 AM') is interpreted as a 24-hour forwarding. Emails that arrive within these 24 hours are forwarded. All other dates with identical start and end time are not interpreted as a 24-hour interval. This means, with a configuration from e.g. '09:00 AM' to '09:00 AM' no emails are forwarded. Change the time period according to the absence.
 - g) Under **Forward emails**, keep the default setting 'Yes'.
 - h) Under **Forward to**, select the deputy (in this example: *David Galler*). The emails are forwarded to this user.
 - i) **Non-forwarding deputy**: refer to "[Non-forwarding deputy](#)" on page 9.
 - j) Usually, the deputy has no access to the quarantined emails of the original recipient. If the 'Yes' option is selected in the **Use for Quarantine Access** field, a separate area for the quarantined emails of the original recipient is displayed in the substitute's quarantine.
2. All further settings are the same as described under "[Setting up Regular Forwarding](#)" on page 7. However, retroactive email processing is not possible for the periodic forwarding.

1.4.3 Setting up Redirection

The following section describes how to configure a permanent redirection to a deputy. In our example, the emails addressed to *Anna Glenn* are permanently redirected to *David Galler*.

1. Click on CLERK -> ABSENCE SETTINGS BY USER -> NEW -> REDIRECTION:

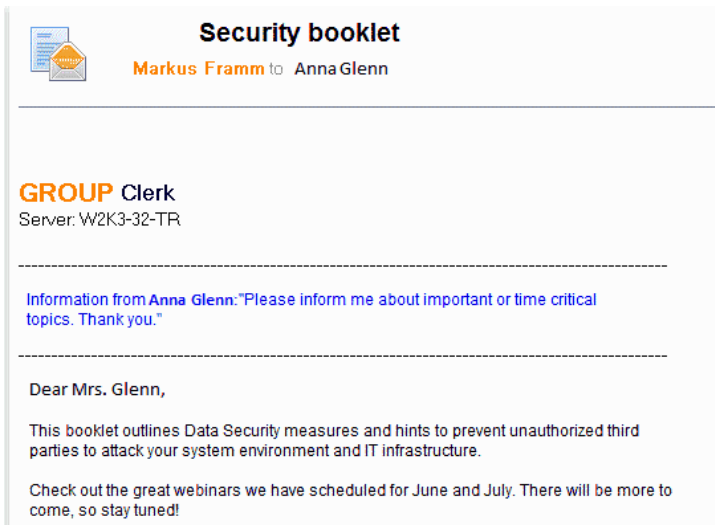
Clerk Redirection	
Settings Notifications Exceptions Misc. Comments	
Settings	
Description	<input type="text" value="UL_AGlenn-To-DGaller"/>
Status	<input type="radio"/> Active <input checked="" type="radio"/> Not active
Redirection for	<input type="text" value="Anna Glenn.LndTestOrg"/>
Retroactive email processing	<input type="checkbox"/> should be used
Redirect emails	<input checked="" type="radio"/> Yes <input type="radio"/> No
Redirect to	<input type="text" value="David Galler.LndTestOrg"/>
Use for Quarantine Access	<input type="radio"/> Yes <input checked="" type="radio"/> No

- Optionally, you can enter a short description of the document.
If you leave the **Description** field empty, the address specified in the **Redirect to** field is automatically entered.
 - Set the **Status** to 'Active'.
 - Under **Redirection for**, select the user whose emails are to be redirected.
 - Retroactive email processing**: Since the emails are not to be retroactively forwarded, leave the option 'should be used' disabled.
 - Under **Redirect emails**, select the option 'Yes'. If you select 'No', no redirection is performed. Only the exceptions defined in the **Exceptions** tab are executed.
 - Under **Redirect to**, select the recipient of the redirected emails (deputy).
 - Use for Quarantine Access**: In the example, Mr Galler receives access rights on the quarantined emails of Mrs Glenn. The emails quarantined for Mrs Glenn are displayed in a separate quarantine area (QUARANTINE -> SUBSTITUTE FOR QUARANTINE ACCESS).
2. In the **Notifications** tab under **Redirection Message**, write a message text for the deputy (e.g. an order to inform the original recipient about important or time-critical emails). This text is added to the redirected email. In the **Redi-**

redirection Subject field, enter the subject text to be used for the email sent to the deputy, e.g. %SUBJECT% will be replaced with the subject of the original email.

3. If required, you can define exceptions in the **Exceptions** tab, e.g. to prevent emails of certain senders from being redirected or to enable retroactive forwarding. Refer to "[Configuration of Exceptions](#)" on page 25. No exceptions are defined in this example, i.e. all emails are redirected to the deputy.
4. In the **Misc** tab under **Document authors**, specify the persons who are authorized to edit the redirection order and the redirection settings.
5. Save the redirection order.

The example shows an email originally addressed to Mrs Glenn, but forwarded to her deputy Mr Galler:



1.5 Settings for Calendar Entries

In the **regular forwarding** document under SETTINGS TAB -> CALENDAR SETTINGS, you can make settings for creating calendar entries. This requires that your iQ.Suite administrator has activated this section for your user.

Clerk Absence / Forward

Settings | Notifications | Exceptions | Misc. | Comments

Settings

Description

Status Active Not active

Absence profile for Anna Glenn/LndTestOrg

Start at Specify times

Up to and including

Retroactive email processing should be used

Forward emails Yes No

Forward to

Non-norwarding deputy

Use for quarantine access Yes No

Calendar Settings

Create calendar entries Yes No

1 Subject for calendar entry

2 Body for calendar entry

3 Category for calendar entry

4 Mark calendar entry as private Yes No

5 Mark calendar entry as available Yes No

6 Location of absence

- The **Create calendar entries** field defines whether calendar entries are to be created automatically for the forwarding period. If 'Yes', you can specify additional settings if you are authorized to edit these settings:
- Use the fields **Subject for Calendar entry** 1 / **Body for Calendar entry** 2 to enter the text to be displayed as subject/body in the calendar entries. The following placeholders can be used:
 - %ABSENTEE%: absent person's name
 - %STARTTIME%: start time of the absence
 - %ENDTIME%: end time of the absence
- Use the **Category for Calendar entry** field 3 to enter arbitrary text for the category of the calendar entries, for example 'Vacation'.
- Use the **Mark calendar entry as private** field 4 to set whether to mark the calendar entries as "private". If 'Yes', other people can only see the period of absence.
- Use the **Mark calendar entry as available** field 5 to set whether you are available during your absence (e.g. for online meetings). This information is

visible in the Notes scheduler area of the new appointment and therefore can be taken into account when new appointments are scheduled.

- 6. In the **Location of absence** field **6**, you can enter arbitrary text. This information might be helpful for other users, for example in case you are working alternately at several locations.

Calendar documents consist of a header (red frame) and a description (green frame) – Example²:

Calendar Entry
 Type: All Day Event

Subject: **1** Absence of Anna Glenn from 20.11.2014 12:00:00 CET up to and including 06.12.2014 23:59:00 CET

When: Starts: Do 20.11.2014 [16] Ends: Sa 06.12.2014 [16]

Where: **6** Location: Berlin

Category: **3** [Vacation]

Description

Attach...

Absence of Anna Glenn from 20.11.2014 12:00:00 CET up to and including 06.12.2014 23:59:00 CET **2**

Automatically generated by **1**

GBS Clerk **2**

Please do not edit. **3**

Creation time: 2014-11-07T10:22:45+01:00 **4**
 Server: CN=srv1/Q=LndTest04
 Source document: **5**

1 to **3** and **5** are defined by the iQ.Suite administrator.

1 to **6** correspond to the settings made in the forwarding document.

2. The illustration is valid for a mail database template of Version 8.5.3.

1.6 Settings for Infomails

In the **regular forwarding** document, you can make settings for sending Info emails. This requires that your iQ.Suite administrator has activated this feature for your user.

1.6.1 Important Definitions and Application Example

■ Info emails

„Info emails“ implies both the absence emails and the presence emails.

■ Absence emails

These are the first Info emails, reminder emails, and update emails.

■ Presence emails

The emails that are sent once the absentee has returned are called „presence emails“. On the Graphical User Interface (Admin Portal and User Portal), „presence“ is also named „Represence“.

Definition of the person types:

■ Absentee

Absent person for whom a forwarding document was created.

■ Deputy

Persons (one or more) that are specified as deputies in the forwarding document.

■ VIP

Potential sender. Defined in more detail, this is a person who might possibly send emails to the absentee during the absence time and whom the absentee wants to inform about the absence in advance. Typically, these are important communication partners, e.g. customers.

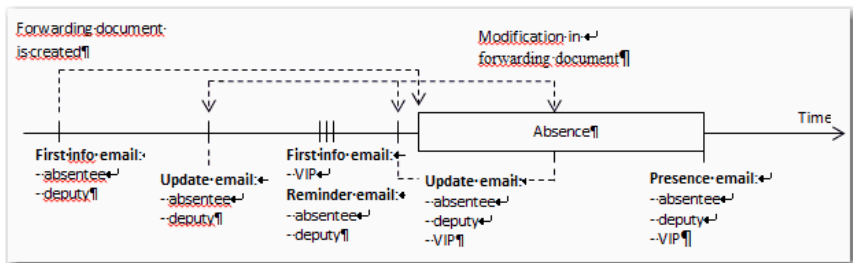
Application example:

For his planned vacation from Nov. 09, 2015 to Nov. 18, 2015, David Galler sets up a forwarding on Oct. 08, 2015 at 9:00 PM. Anna Glenn is defined as his deputy, Boris Zidane and Kai Baron are specified as VIPs. By default, about 5 to 6

minutes after the forwarding document is saved, the first Info email is sent to the absentee and the deputies. On Aug. 24, 2015, Mr. Galler changes his vacation plans since he has to return to work already on Nov. 15, 2015. Based on this change, in the forwarding document on Aug. 24, 2015, by default 5 to 6 minutes later, an update email is sent to the absentee and the deputies. Since the VIPs haven't received any first Info email yet, they won't receive an update email. By default, the VIPs will receive the first Info email 7 days before the absence time starts.

1.6.2 Overview of the Infomail Feature

In the following, you will find an overview about the possibilities of the Infomail feature:



If the ‚Info emails‘ feature is activated, a notification to the absentee and the deputy is automatically generated when the forwarding is set up (**first Info email**). The setup may take place already weeks or months ahead of the actual absence and therefore can easily be forgotten. Therefore, in addition, a reminder can be defined that is sent shortly before the absence starts (**reminder email**). The first Info email for the VIPs is normally sent only a few days before the absence starts. That is why any reminder email for VIPs is not intended.

When a saved forwarding document is changed (e.g. change of the absence time), an **update email** can be sent to all person types.

When the absentee is present again, **presence emails** can be sent.

All [Info emails](#) have a sender address. The reply to the Info email is sent to the defined reply address. For all Info emails, the following applies:

1.6.3 Configuration in the Regular Forwarding Document

Use the **Infomail** tab to make the following settings:

Clerk Absence / Forward

Settings | Notifications | Exceptions | Misc. | **Infomail** | Comments

Infomail

Send infomails about absence	Send infomails about presence
<input checked="" type="checkbox"/> to me <input type="checkbox"/> Reminder 0 days before	<input type="checkbox"/> to me
<input checked="" type="checkbox"/> to deputy <input type="checkbox"/> Reminder 0 days before	<input type="checkbox"/> to deputy
<input checked="" type="checkbox"/> to VIPs Previous information 7 days before	<input type="checkbox"/> to VIPs
My VIPs	boris.zidane@company-y.com kai.baron@company-y.com

1. Use the left column of the SEND INFOMAILS ABOUT ABSENCE table to specify to which person types to send absence emails. The checkboxes at the left border (**to <xy>**) apply to the first Info emails and update emails:
 - to me**: to the absentee. This is the person for whom the forwarding document is configured (entry on the **Settings** tab in the **Absence profile for field**).
 - to deputy**: These are both, the persons who are entered under **Settings** in the **Forward to** field and in the **Non-forwarding deputy** field, and the deputies in case of exceptions (**Exceptions** tab).
 - to VIPs**: Persons entered in the **My VIPs** field. Use this field to specify the VIPs' addresses. If these persons are entered in the Notes address book, select their addresses from the Notes address book. Otherwise, enter the VIP's Internet addresses manually. Use a separate line for each address.

2. If, in addition to the first Info emails and the update emails, reminder emails are to be sent, activate the option **Reminder** and, under **days before**, specify how many days prior to the start of the absence time a reminder email should be sent (possible values: 1 to 14 days).
 For the VIPs, the previous information is the first Info email. In the field next to **Previous information**, enter how many days in advance of the absence time start the VIPs should be notified of the coming absence. Please note that no

reminder emails are sent to VIPs. That's why we recommend to inform the VIPs not too long in advance (default: 7 days; possible values: 0 to 30 days).

All person types (incl. VIPs) will receive update emails when changes are made to the absence period. This applies only if the changes were made after the first Info email was received.

3. In the SEND INFOMAILS ABOUT PRESENCE section, specify the person types who should receive a presence email once the absence time is over.

1.7 Configuration of Exceptions

If the **Exceptions** tab is available, you can define exceptions for email redirection and forwarding.

With the options 'Check sender only' and 'Check sender and content' you can link emails from special senders to a special action, e.g. preventing private emails from being forwarded to a deputy. You can define several exceptions for various senders and for special email contents. All exceptions are listed in the **Exceptions** tab. Use the *Sort* icon to change the order of the entries. The first entry in the list is the first one processed.

The following examples refer to redirection and forwarding orders.

1.7.1 No Forwarding of Newsletters, no Notification of the Senders

In general, emails shall be forwarded to a deputy and the senders shall receive an out-of-office reply.

Exception: Subscribed newsletters shall be delivered only to you, and the sender of the newsletter shall not be informed. Consider that the sender address must be known.

1. Configure a regular or periodic forwarding as described in the previous chapters.
2. Open the **Settings** tab and select 'Yes' for **Forward emails**. In the **Notifications** tab, select 'Yes' as well for **Allow sender notification**.
3. Open the **Exceptions** tab. Under **Checking mode**, select the 'Check sender only' option. With this, only the sender address is checked, not the content of the incoming email.
4. Under **Controls for Exceptions**, click on :

5. Select the option 'Do not forward - do not notify sender' and enter the corresponding sender with his/her Internet address, in this case the newsletter address. If the **Sender** field is empty, all senders will be included to the selection. The following placeholders can be used 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 finds house, horse, ho3se, etc.
 - \! (backslash exclamation mark) = any single letter.
Example: be\!t finds belt, best, bent, etc.
 - \# (backslash lozenge) = any digit.
Example: Ha\#s finds Ha1s, Ha3s, Ha9s, etc.
6. Click on OK and save the forwarding order.

An email from the sender *newsletter@company.com* is not forwarded to the deputy. The senders do not receive an out-of-office reply. Other emails are handled as defined in the **Settings** tab.

1.7.2 No Forwarding of Private EMails, Notification of the Senders

In general, emails shall be forwarded to a deputy and the senders shall receive an out-of-office reply.

Exception: Private emails shall be delivered only to you, and the email sender shall be informed. In the example, all emails with the text 'private' in the subject line shall be excluded from a forwarding.

1. Configure a regular or periodic forwarding as described in the previous sections.
2. Open the **Settings** tab and select 'Yes' for **Forward emails**. In the **Notifications** tab, select 'Yes' as well for **Allow sender notification**.
3. Open the **Exceptions** tab:
 - a) Under **Checking mode**, select the 'Check sender and content' option.
 - b) Under **Controls for Exceptions**, click on :
 - ▷ Under **Working mode**, select the 'Do not forward - notify sender only' option.
 - ▷ Use the **Field for content** field to search for certain keywords in field names. In our example, the email's subject line is analyzed for a certain keyword. As an alternative, you can select 'Body' to analyze the email body.
 - ▷ Under **Content**, specify the keywords to be looked for (here: **private**). Note that only emails that contain the string 'private' in the subject line are recognized and classified as private ones. For each keyword, an exception must be created. Put an asterisk before and after the keyword (**<keyword>**).
 - ▷ Leave the **Sender** field empty. With this, emails from all senders are analyzed.
4. Click on OK and save the forwarding order.

Emails with the word 'private' in the subject line are not forwarded to the deputy, but only delivered to the original recipient. The email sender receives an out-of-office reply. Non-private emails are handled as defined in the **Settings** tab.

1.7.3 Forwarding Emails with Special Content to a different Deputy

In general, emails shall be forwarded to a deputy and the senders shall *not* receive an out-of-office reply.

Exception: Emails from *company-x* that contain confidential content are not to be delivered to the deputy but to another person (*David Galler*).

1. Configure a regular or periodic forwarding as described in the previous sections.
2. Open the **Settings** tab and select 'Yes' for **Forward emails**. In the **Notifications** tab, select 'No' for **Allow sender notification**.
3. Open the **Exceptions** tab.
 - a) Under **Checking mode**, select the 'Check sender and content' option.
 - b) Under **Controls for Exceptions**, click on :

New Entry	
<input checked="" type="radio"/> Forward to	
<input type="radio"/> Do not forward - notify sender only	
<input type="radio"/> Do not forward - do not notify sender	
Working mode	
Field for content	Body
Content	*confidential*
Sender	*@company-x.com
Forward to	David Galler/mycompany
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

- ▷ Select the 'Forward to' option.
- ▷ In the **Field for content** field, select 'Body' to search for a certain keyword within the email body. In our example, the original recipient knows precisely that emails from *company-x* are always marked with the keyword 'confidential'.
- ▷ Under **Content**, specify the keywords to be searched for in the email body (here: **confidential**).
For each keyword, an exception must be created. Put an asterisk before and after the keyword (**<keyword>**).

- ▷ In the **Sender** field, enter the sender address of the company (here: *company-x*).

4. Click on OK and save the forwarding order.



You want to check both, the sender and the content. For this, the 'Check sender and content' option is selected. However, one entry in the list under **Field for content** in the **Exceptions** tab is to be excluded from the content analysis. Define an exception within the combined sender and content analysis option. To do so, create a new entry and, under **Field for content**, select the 'No content analysis' option. Specify the sender and save the entry. This entry will also be displayed in the list in the **Exceptions** tab, however, with the note [No content analysis].

1.7.4 Retroactive Email Forwarding with a Redirection Order

As of now, all your incoming emails are to be redirected permanently to a deputy. In addition, emails of the last 2 weeks shall be forwarded retroactively.

1. Configure a redirection order according to the description under "[Setting up Redirection](#)" on page 17. Hereafter, only the settings specifically required for retroactive forwarding are described.
2. Open the **Settings** tab:

Clerk Redirection

Settings Notifications Exceptions Misc. Comments	
Settings	
Description	UL_AGlenn-To-DGaller
Status	<input checked="" type="radio"/> Active <input type="radio"/> Not active
Redirection for	Anna Glenn/LndTestOrg
Retroactive email processing	<input checked="" type="checkbox"/> should be used
Start at	6.06.2015 16:00:00 Local time
Redirect emails	<input checked="" type="radio"/> Yes <input type="radio"/> No
Redirect to	David Galler/LndTestOrg
Use for Quarantine Access	<input type="radio"/> Yes <input checked="" type="radio"/> No


3. Under **Retroactive email processing**, enable the 'should be used' option.
4. In the subsequent field, enter the start time for retroactive forwarding. In the example, all received emails as of and including July 1, 2015 at 12:00 AM are forwarded retroactively to the specified deputy.

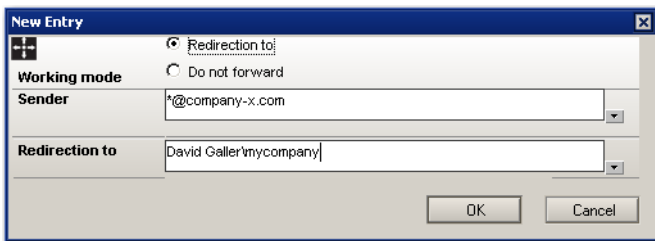
5. Click on OK and save the redirection order.

1.7.5 Redirection of Emails from Special Senders to Another Deputy

Emails are to be redirected permanently to a deputy.

Exception: Emails from *company-x* are not to be delivered to the usual deputy, but to another deputy (*David Galler*).

1. Configure a redirection as described in the previous sections.
2. Open the **Settings** tab:
 - a) Under **Redirect emails**, select 'Yes'.
 - b) Specify the usual deputy in the **Redirect to** field.
3. Open the **Exceptions** tab.
 - a) Under **Checking mode**, select the 'Check sender only' option.
 - b) Under **Controls for Exceptions**, click on :



The screenshot shows a 'New Entry' dialog box with the following configuration:

- Redirection to:**
- Working mode:** Do not forward
- Sender:** *@company-x.com
- Redirection to:** David Galler\mycompany

- ▷ Under **Working mode**, select the 'Redirection to' option.
 - ▷ In the **Sender** field, enter the desired sender address (here: **@company-x.com*). Emails from all senders of *company-x.com* are not sent to the usual deputy.
 - ▷ In the **Redirection to** field, select the email address of the special deputy from the address book.
4. Click on OK and save the redirection order.

As of now, emails from *company-x* are redirected to the deputy David Galler. All other emails are redirected to the deputy defined in the **Settings** tab (**Redirect to** field).

1.7.6 No Redirection of Emails from Special Senders

Emails from certain senders shall not be redirected.

1. Configure a redirection as described in the previous sections.
2. In the **Settings** tab under **Redirect emails**, select the option 'Yes'.
3. In the **Settings** tab, specify the usual deputy in the **Redirect to** field.
4. Open the **Exceptions** tab:
 - a) Under **Checking mode**, select the 'Check sender only' option.
 - b) Under **Controls for Exceptions**, click on :
 - ▷ Under **Working mode**, select the 'Do not forward' option.
 - ▷ In the **Sender** field, enter the desired sender address. Emails from this address will not be redirected to the deputy.
5. Click on OK and save the redirection order.