

User's Guide

A highly scalable, open architecture, internet messaging system running on Windows and Linux platforms.

7

Internet Exchange Messaging Server

VERSION

IMA INTERNATIONAL MESSAGING ASSOCIATES

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IEMS

Internet
Messagin



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ISBN: 962-8137-41-7
Document ID: IEMS7USRGUI001
Date of Publication: June, 2003

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CONTENTS

| | | |
|------------------|---|----|
| Preface | Conventions Used In This Manual | 6 |
| Chapter 1 | Introduction | 7 |
| Chapter 2 | Web Mail Client | 9 |
| | Message and Mailbox Operations | 9 |
| | Viewing the Message List in the Inbox Folder | 10 |
| | Viewing the Message List in a User-defined Folder | 10 |
| | Viewing the Message List in the Outbox Folder | 11 |
| | Opening and Reading a Message | 12 |
| | Viewing a Message Attachment | 12 |
| | Forwarding Messages | 13 |
| | Reply / Reply All | 14 |
| | Message Deletion | 15 |
| | Message Composition | 16 |
| | Sending File Attachments | 16 |
| | Deleting Uploaded File Attachments | 17 |
| | Copying and Moving Messages to Another Folder | 17 |
| | New Folder Creation | 18 |
| | Renaming Folders | 19 |
| | Deleting Folders | 19 |
| | Searching for Messages | 19 |
| | Viewing Message Headers | 20 |
| | Viewing Message Source | 21 |
| | Web Folders | 21 |
| | New Folder Creation | 22 |
| | Uploading Files | 23 |
| | File / Folder Renaming | 23 |
| | Files / Folder Deletion | 23 |
| | Spam Filters | 23 |
| | Spam Filtering Overview | 23 |
| | MTA Pass-Through | 25 |
| | Local Services | 26 |
| | Bayesian Filter | 27 |
| | Configuration | 28 |
| | Address Book | 33 |
| | Global Address Books | 33 |
| | Personal Address Book | 34 |

| | | |
|------------------|---|----|
| | Using the Address Book When Composing Messages | 38 |
| | Signatures | 39 |
| | Password Maintenance | 40 |
| | Bookmarks | 40 |
| | User Profile | 42 |
| | Mailsort | 43 |
| | Creating Filter Rules | 43 |
| | Adding Filter Rules | 45 |
| | Deleting Filter Rules | 46 |
| | Editing Existing Filter Rules | 46 |
| | Positioning Filter Rules | 47 |
| | Automatic Vacation Messages | 47 |
| | Schedules | 48 |
| | Microsoft Outlook Internet Free / Busy Feature | 48 |
| | IEMS Free/Busy Server | 49 |
| | Distribution Lists | 50 |
| | Available Mailing Lists | 50 |
| | Distribution List Manager Confirmation Messages | 51 |
| | Subscribe | 52 |
| | Unsubscribe | 53 |
| | Login / Logout | 54 |
| Chapter 3 | Distribution List Configuration | 55 |
| | System Login | 55 |
| | Configure Mailing List | 57 |
| | Edit Subscriber List | 59 |
| | Viewing Current Subscribers | 60 |
| | Spam Filter Configuration | 61 |
| | Descriptive Information | 65 |
| | Update Password | 66 |
| Chapter 4 | Distribution List Subscription | 67 |
| | Open Mailing Lists | 67 |
| | Mailing List Subscription | 67 |
| Chapter 5 | Distribution List Archives | 69 |
| | Viewing Messages Sorted by Date | 70 |

| | |
|--|----|
| Viewing Messages Sorted by Thread | 71 |
| Viewing Messages Sorted by Author | 71 |
| Searching for an Archived Message | 72 |
| Archived Message | 72 |
| User Login | 73 |
| User Registration | 74 |
| Changing the Password for Remote Members | 74 |
| Appendix A Introduction to Outlook 98/2000 Free/Busy Features | 75 |
| Microsoft Outlook Internet Free / Busy Feature | 75 |
| IEMS 7 Free/Busy Server | 75 |
| Outlook Configuration | 75 |
| Free/Busy Option Configuration | 78 |
| Access Control Configuration | 79 |

Index

PREFACE

This is the Internet Exchange Messaging Server (IEMS) version 7 User's Guide that comes with your software. This Guide has been written to help you configure and use IEMS on your Linux or Windows based network.

This manual is but one part of the entire IEMS 7 documentation set. It is assumed the software has already been successfully installed. The IEMS 7 documentation set is made up of the following volumes:

- Internet Exchange Messaging Server 7 Principles of Operation
- Internet Exchange Messaging Server 7 Site Planning Guide
- Internet Exchange Messaging Server 7 Installation Guide
- Internet Exchange Messaging Server 7 Administrator's Manual
- Internet Exchange Messaging Server 7 cc:Mail Connector
- Internet Exchange Messaging Server 7 Lotus Notes Connector
- Internet Exchange Messaging Server 7 User's Guide
- Internet Exchange Messaging Server 7 Programmers Manual

All IEMS documentation can be found either on the IEMS 7 CDROM, or downloaded from the IMA web site (<http://www.ima.com/documents/>).

Each chapter in this manual provides an module overview, and then detailed information regarding the configuration and operation of each module. The manual is organized into the following chapters:

Chapter 1, *Introduction*

Chapter 2, *Web Mail Client*

Chapter 3, *Distribution List Configuration*

Chapter 4, *Distribution List Subscription*

Chapter 5, *Distribution List Archives*

Appendix A, *Introduction to Outlook 98 / 2000 Free / Busy Features*

CONVENTIONS USED IN THIS MANUAL

Conventions Used In This Manual

The conventions used in this manual are designed to help you learn IEMS 6 easily and efficiently.

Directory Path (e.g. *c:\VMACert.imc*) are printed in italic, arial font.

File names (e.g. **Setup.exe**) are printed in bold, arial font.

Menu choices (drop-down or pull-down list, links, columns, parameters, fields) are presented in bold, arial black font (e.g. **Host Table filename**).

Button commands (e.g. **Add**) are presented in bold, italic, arial font.

Screen Page (e.g. **User Details page**) are put in quote.

Keyboard Keys are presented in this manner: **ENTER; DELETE**

Anything you are asked to type are presented in courier new font (e.g. *jd@ima.com*).

CHAPTER 1

Introduction

IEMS end user tools available to the end user include the Web Mail Client, individual Directory editing tools, MailSort, Password maintenance, and others. For sites running the **Professional Enterprise** (PE) edition of IEMS, options to view available mailing lists and/or subscribe to or unsubscribe from distribution lists, Web Folders, and advanced Anti-Spam controls are available.

With the exception of the Distribution List related configurations, all user account related configuration is performed through the Web Mail Client. This includes configuration of the personal address book, signatures, password maintenance, list subscription (SE/PE editions), and Microsoft Outlook compatible Free/Busy access control list maintenance (PE edition).

When accessing the main IEMS page, users will be greeted with the following screen (PE Edition):



Figure 1: IEMS Home Page

3-User and **SE** Edition users will be presented a similar screen to above, with the exception that the Distribution List related options are absent.

All selections require the user to authenticate themselves with an account name and password. Regular users are not usually permitted into the *System Administration* area, as this is used by the site administrator in configuring and maintaining the entire system.

The Web Mail Client, where most individual configuration can be found, as well as the Distribution List related options are described in detail in the following chapters.

CHAPTER 2

Web Mail Client

Message and Mailbox Operations

In addition to being able to access their email using standard IMAP/POP email clients (Outlook Express, Netscape Communicator, Pegasus, etc), the Web Mail Client allows users to access their Message Store mail. Users may compose messages, reply to received messages, or forward messages via the Web Mail Client using any web browser. However, they must undergo the proper authentication procedure. To do so, click the **Web Mail Login** button on the main web administration interface. The “Web Mail Login” screen (see Figure 2 on page 9) appears. Type the username and password in the respective text boxes as provided. Click the **Proceed** button. This action (see Figure 3 on page 10) displays the “Inbox” summary screen if log in was successful. Otherwise, it displays an error message



Figure 2: Web Mail Login

The Web Mail Client user interface is divided into two parts. The main menu and output window. The output window displays the screen corresponding to the command selected in the main menu.

The main menu is found in the left most part of the screen and contains three sections - **Main**, **Options**, and **Mailing List** (PE edition only). The **Main** selection box is used for message composition, web folders, spam filters, and mailbox maintenance. The **Options** section is used to maintain the users account, and allows the user to edit their profile, signature, password, mail-sort options, and for PE edition users provides the ability to edit the Free/Busy access controls. The **Mailing List** selection box is present on the PE edition, and provides controls for managing distribution list subscriptions.

Accessing any of the existing folders via the **Inbox**, **Outbox** and **Folders** buttons displays a “Folder” message list screen. This screen lists all messages

MESSAGE AND MAILBOX OPERATIONS

stored in the selected folder in a table with six columns. Each row holds a message. The first column contains the check box for the message. The second column labeled **INFO** contains status information related to the message.

If a message has not been read, its **INFO** column contains yellow closed envelope. The third column labeled **FROM** holds the email address of the message sender. The fourth column holds the **DATE** and time when the message was received. The fifth column contains the **SUBJECT** of the message. The last column holds the size of the message in kilobytes.

Messages can be sorted by any of the fields present in the display. The **INFO** field sorts messages by the time they are received. The other columns can display messages based upon their respective fields. To sort on any column, simply click on the column heading. The currently selected sorting method can be seen by a small triangle next to the active column. The direction of this triangle, or arrow, determines the sorting order. For instance, if the arrow points downward next to the **INFO** column, then messages are sorted by date received, with the most recent at the top. To change the sorting order, simply click on the direction arrow.

Viewing the Message List in the Inbox Folder

The **Inbox** button, by default, stores all incoming messages. To view the INBOX message list, click the **Inbox** button on the left menu frame. This displays the “Inbox” message list screen (see Figure 3 on page 10).



Figure 3: Inbox Message List

Viewing the Message List in a User-defined Folder

The **Outbox** button contains a copy of all the sent messages. To view the sent messages, click the **Outbox** button on the left menu frame. This instructs the output window to display the “Outbox” message list screen (see Figure 4 on page 11).

MESSAGE AND MAILBOX OPERATIONS



Figure 4: Outbox Message List

Viewing the Message List in the Outbox Folder

The **Folders** button displays summary information for all available folders contained in the user’s account. Specific information, such as the number of unread and read messages, size and commands available can be viewed on this screen (see Figure 5 on page 11).



Figure 5: Folders Page

Click the link of the selected folder (e.g. Bart’s School Antics) to display its message list screen (see Figure 6 on page 11).



Figure 6: Example Message List For a User Defined Folder

Opening and Reading a Message

To open and read a message, go to the selected message list page of the folder (e.g. Inbox). Open the message by clicking its sender's link located under the **From** column (e.g. bart@boracay.jade.net). This action displays the message contents, such as the message sender, subject, body and file attachments (see Figure 7 on page 12).

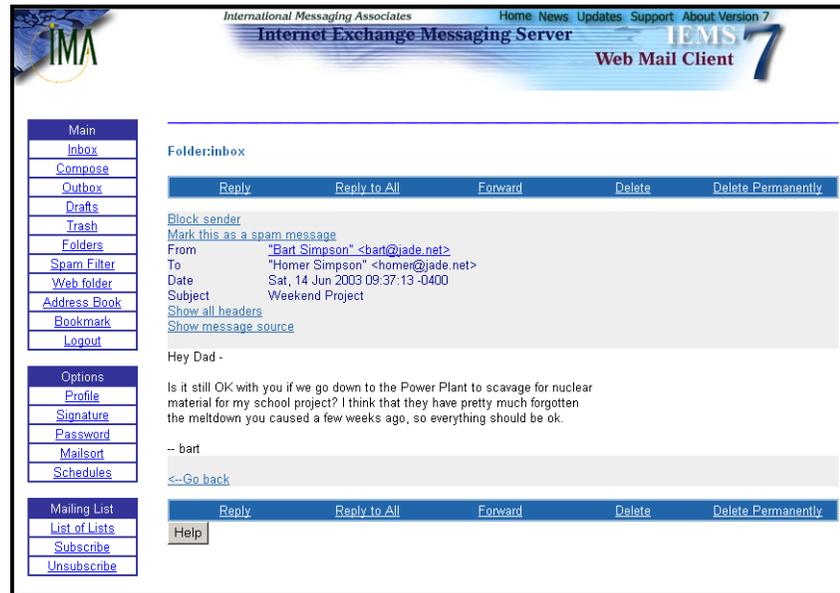


Figure 7: Reading a Message

Note: Only one message can be viewed at a time.

Viewing a Message Attachment

Video files, documents, spreadsheets and pictures and others can be sent via email as file attachments. On the screen showing the message content (see Figure 7 on page 12), each of the attached files has its filename presented as a link. To open an attached file, click its corresponding link (e.g. attach.doc). Depending on the browser and file type, the file will either be displayed directly by the browser or the browser will display a "File Download" message box. In the case of Internet Explorer, the "File Download" message box will prompt the user to select whether to open the file attachment (launching a local application) or save it on disk (see Figure 8 on page 13). To open the attachment using a local application (file viewer, etc), click the radio button of the **Open the File at its current location**. Selecting **Save this File to disk** saves the file on disk for storing and later viewing. An alternate method of saving a file in the case of Internet Explorer is to right click on the attachment link, and then specify the action to take on the file (save to disk).



Figure 8: Viewing a Message Attachment

For accounts that have web folders enabled, attachments can also be saved directly to the users web folder storage area. Simply click on the **Save this file to Web folder** to bring up the web folder file save screen (see Figure 9 on page 13).

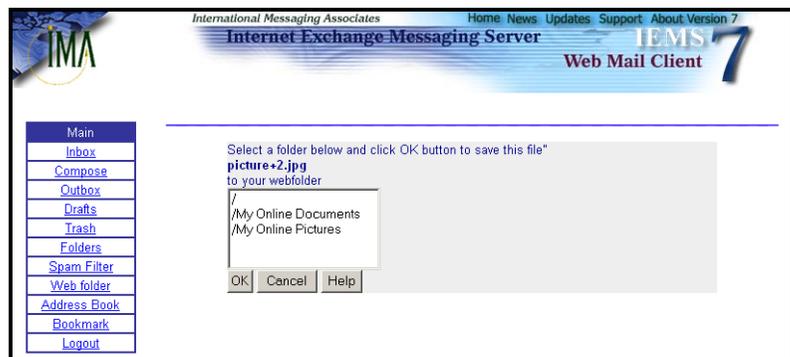


Figure 9: Web Folder File Save

Forwarding Messages

The **Forward** link (see Figure 8 on page 13) allows users to forward a message to another person. Clicking this link displays the “Forward” screen (see Figure 10 on page 14). Type the email address for each recipient in the **To** box. Separate each address with a semicolon (;). Optionally, names and addresses can be looked up in either the user’s private address book or a global address book (please see “Address Book” on page 33 for more information).

MESSAGE AND MAILBOX OPERATIONS

After entering the recipients addresses, additional forwarding text can be placed along with the forwarded message by entering text in the space given before the “Forwarded Message” label. The forwarded message is not shown at this time, but will be automatically attached to the new message. Afterwards, click the **Send** button.

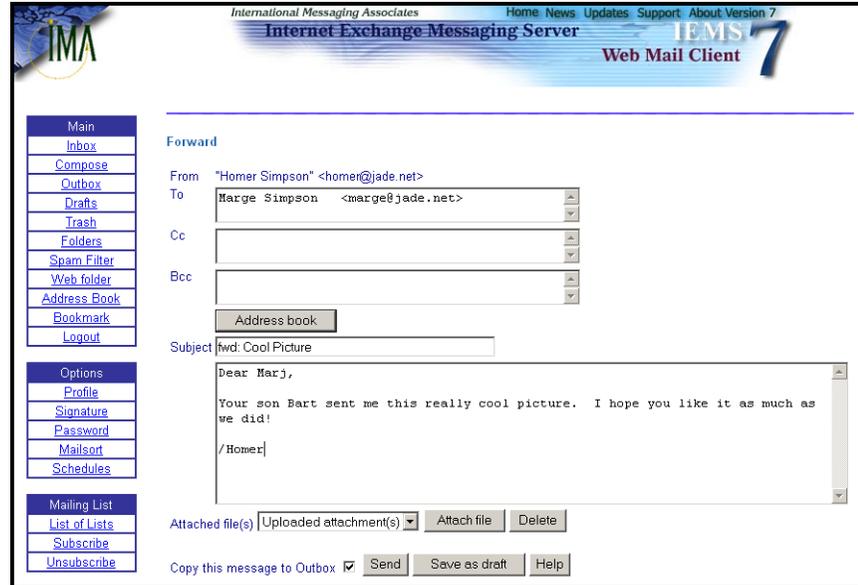


Figure 10: Forwarding a Message

Reply / Reply All

Users have the option to reply to the message sender or to the sender and all its recipients. To reply to the message sender only, click the **Reply** link (see Figure 8 on page 13). Users may also reply to the sender and all the recipients by clicking the **Reply All** link if a response is needed for a number of people listed in the **From**, **To** and **Cc** fields. After composing a response, click the Send button. This action displays the “Reply” screen (see Figure 11 on page 15) where users may type additional addresses in the **To**, **Cc**, **Bcc** fields. Users may also update the **Subject** field.

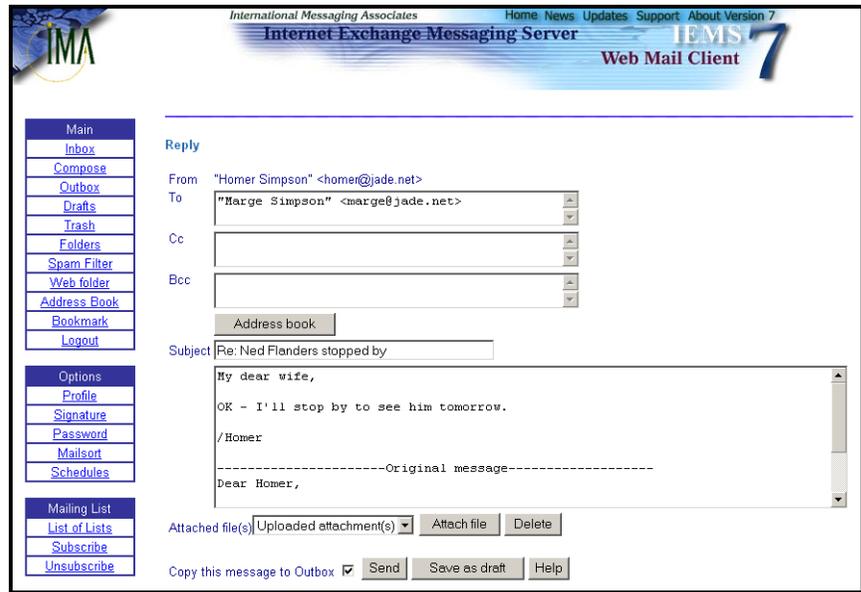


Figure 11: Replying to a Message

Message Deletion

To dispose of unwanted mail messages within a folder, an entry can be deleted by marking the check box and clicking the **Delete** button (see Figure 7 on page 12). Users may also delete the message after reading by marking the check boxes of messages for deletion in the folder display, and clicking the **Delete** button (see Figure 12 on page 15).



Figure 12: Deleting Messages

Note: Multiple deletion is allowed.

Deleted messages are moved into the users **Trash** folder. This folder will be periodically emptied by the system. However messages are retained here for a short time in case a user changes their mind about message deletion. To bypass this step, and to make deletion immediate, select the **Delete Permanently** button.

MESSAGE AND MAILBOX OPERATIONS

Message Composition

To compose a message, click the **Compose** button. This option displays the “New Message” screen (see Figure 13 on page 16). In the **To** field, type the email address of recipients. Separate each address with a comma or semi-colon. Users may also send a copy of the message to other recipients by entering their respective email addresses in the **Cc** and **Bcc** fields. Addresses entered in the Bcc fields will not be seen by the message recipients specified in the **To** and **Cc** fields. Recipient addresses for any of the above fields can also be selected from the user’s private address book or the global address by selecting the *Address Book* button (please see “Address Book” on page 33 for more information). Type the subject in the **Subject** field. In the large text box, compose the body of the message. Click the Send button when done composing the message.

The screenshot shows the 'New message' composition interface. At the top, there is a navigation bar with links for 'Home', 'News', 'Updates', 'Support', and 'About Version 7'. The main header includes the 'International Messaging Associates' logo and the 'Internet Exchange Messaging Server 7 Web Mail Client' title. On the left side, there is a vertical menu with categories: 'Main' (Main, Inbox, Compose, Outbox, Drafts, Trash, Folders, Spam Filter, Web folder, Address Book, Bookmark, Logout), 'Options' (Profile, Signature, Password, Mailsort, Schedules), and 'Mailing List' (List of Lists, Subscribe, Unsubscribe). The main composition area is titled 'New message' and contains the following fields: 'From' (pre-filled with 'Bart Simpson' <bart@jade.net>), 'To' (pre-filled with 'Homer Simpson' <homer@jade.net>), 'Cc', 'Bcc', and 'Subject'. Below the 'Bcc' field is an 'Address book' button. A large text area is provided for the message body. At the bottom, there is an 'Attached file(s)' section with a dropdown menu showing 'Uploaded attachment(s)', and buttons for 'Attach file' and 'Delete'. At the very bottom, there is a checkbox for 'Copy this message to Outbox' (checked), and buttons for 'Send', 'Save as draft', and 'Help'.

Figure 13: Composing and Sending a Message

Note: To save a copy of message in the **OUTBOX** folder, mark the checkbox of “Copy this message to Outbox”.

Sending File Attachments

Files can be attached to new messages by either selecting them from files located on the users workstation, or from the users web folder area (if enabled). To attach a file to a new message, after composing the message (see Figure 13 on page 16), click the **Attach File** button. This command displays the “Attach File” screen (see Figure 14 on page 17).

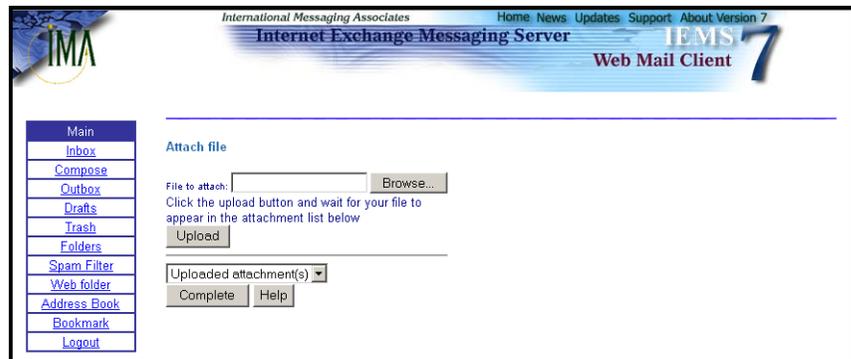


Figure 14: Attach File Page

Any combination of local and web files can be specified. To select a local file, specify the full directory path and name (e.g. *C:\directorypath\attach.doc*) of the file to be attached to the message in the **File to attach** box. The **Browse** button may also be used to locate the path where the file to be attached is stored. Click the **Upload** button to upload the file to the web mail server. Once done the file will be included in the **Uploaded attachments** drop-down list.

Web folder files can be selected in the **attach file from web folder** list of files. To attach a file from a web folder, select the desired file from the list of available web folder files, and click on the **Attach selected file(s)** button. This marks the files for inclusion, and adds the selection(s) to the **Uploaded attachments** drop-down list.

When finished selecting file attachments, click the **Complete** button. This action brings back the “New Message” screen (see Figure 13 on page 16). Click the **Send** button to send the message with attachments.

Deleting Uploaded File Attachments

To delete uploaded file attachments on the “New Message” screen (see Figure 13 on page 16), simply select the uploaded file from the Uploaded Attachments drop-down list and click the **Delete** button.

Copying and Moving Messages to Another Folder

Copying and moving messages involve two folders: the source and destination folders. The messages to be copied/moved from the source folder are transferred to the destination folder.

To copy one or more messages from one folder to another, first select the messages to be copied by marking their respective check boxes. Then, choose the **destination folder** from the **Copy/Move Selected Mail To Other Folder** drop-down list. Click the **Copy To** button.

This command creates duplicate copies of the messages selected from the source folder and stores these duplicates in the destination folder. After this

MESSAGE AND MAILBOX OPERATIONS

procedure, the message list page of the source folder remains unchanged, while the message page of the destination folder reflects the addition of the copied messages. The procedure above also applies in moving messages to another folder, but users must click the **Move To** button instead of the **Copy To** button.

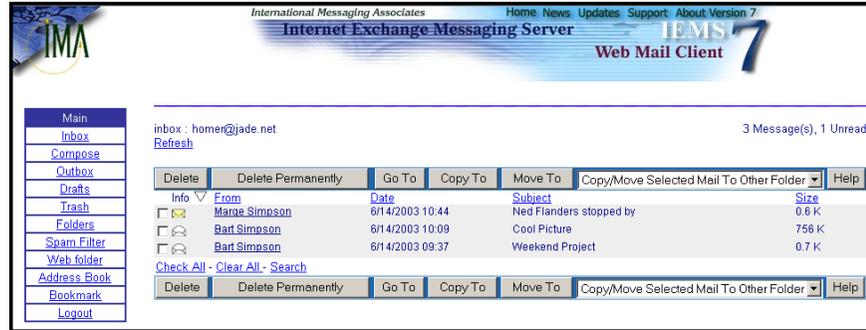


Figure 15: Copying and Moving Messages to Another Folder

Note: To copy or move all messages in the current folder to another folder, click the **Check All** link.

New Folder Creation

Users may organize their messages according to subject, sender, among others by creating one or more folders.

To do this, click the **Folders** button on the left menu frame. This option displays the “Folders” screen (see Figure 5 on page 11). Click the **Create New Folder** button. The “Create New Folder” screen (see Figure 16 on page 18) appears. Enter the folder name to be created in the text box provided. Click the **Confirm** button. This creates a new folder to be created and brings back the “Folders” screen, which displays existing folders, including the newly created folder.



Figure 16: Creating a New Folder

Renaming Folders

To rename a folder, click the **Rename** link of the folder to be modified on the “Folders” screen (see Figure 5 on page 11). This command displays the “Rename Folder” screen. Type a new name for the selected folder in the text box provided (see Figure 17 on page 19). Click the **OK** button to apply the new name. This action displays the “Folders” screen with the renamed folder.

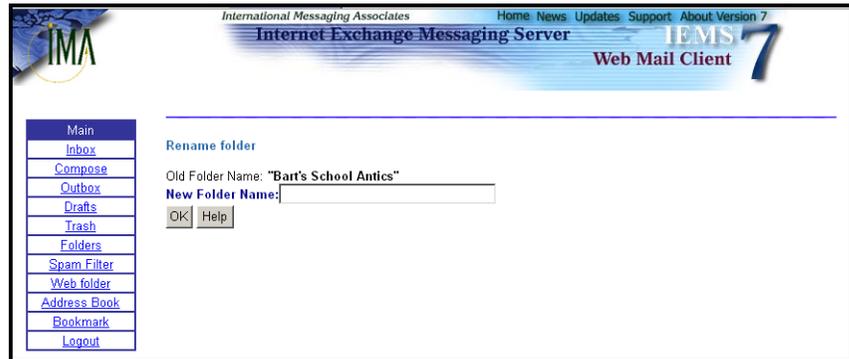


Figure 17: Renaming a Folder

Deleting Folders

A folder can easily be deleted using the **Delete** link. To delete a folder, go to the “Folders” screen (see Figure 5 on page 11) and then click the **Delete** link of the folder users remove.

Searching for Messages

As the number of messages retained in the message store rises, it can become increasingly difficult to find a message or group of messages. To aid users in finding hard to find messages in one or more folders, a search facility has been added to all folder screens. Located at the bottom of each folder screen is a **Search** link. Clicking on this search link brings up the Find Message screen (see Figure 18).

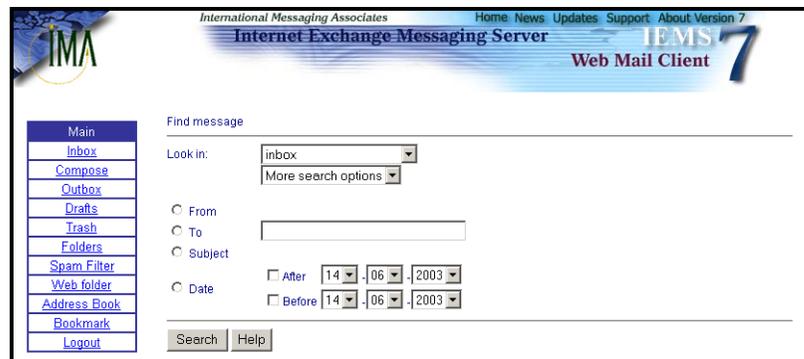


Figure 18: Find Message Screen

MESSAGE AND MAILBOX OPERATIONS

The Find Message screen is made up of two sections - where to look for messages, and what to look for. To tell the system where to look for message, select the appropriate folder or folders from the drop-down selection boxes under **Look in**. The top box selects a folder to search. If you need to search a single folder, just select it in this selection box. If you need to search multiple sub-folders, the parent folder is selected in the upper box, and then **Include sub-folders** should be selected in the bottom box. If you want to search all folders, select **Search all folders** in the bottom box (any selection in the upper box will be ignored in this setting).

Message searches are based on information found in any of the following message fields: **To**, **From**, **Subject**, and **Date**. To determine which field to search on, select the appropriate button next to the list of fields. If the search is on information found in a **To**, **From**, or **Subject** header, type a string to search against in the box next to the field names. If searching by **Date**, indicate a range of dates in the date fields to the right of the Date selection box.

When done selecting where and what to search for, click on the **Search** button to start the search. If the resulting search returns messages in a single folder, a folder screen will be displayed, containing the found message entries. If the search results in messages spread across multiple folders, a list of folders will be displayed (see Figure 19). Selecting any given folder name will bring up a folder screen for that folder with the selected messages listed.



Figure 19: Multiple Folder Search Results

Viewing Message Headers

To view the contents of the message header, click the **Show Message Header** link on the "View Message" screen (see Figure 7 on page 12). The "View Message Header" appears (see Figure 20 on page 21).



Figure 20: Viewing Message Headers

Viewing Message Source

Before viewing the original message, the Web Mail Client displays the message headers for easy identification of mail.

To view the contents of the message source, click the **Show Message Source** link on the "View Message" screen (see Figure 7 on page 12). The "Show Message Source" screen (see Figure 21 on page 21) appears.



Figure 21: Viewing Message Source

Web Folders

Web folders allow the user to store files on the IEMS server so that they can be accessed at any time and any place with a web browser. Web folder access is integrated with the Web mail client. Email attachments can also be directly saved to Web folders. In addition, regular files stored in web folders can be easily retrieved and attached to messages.

The Web folder manager is used to manage online files and folders. To access the Web Folder manager, select the **Web folder** button in the main selection area. The following screen will be displayed:

WEB FOLDERS

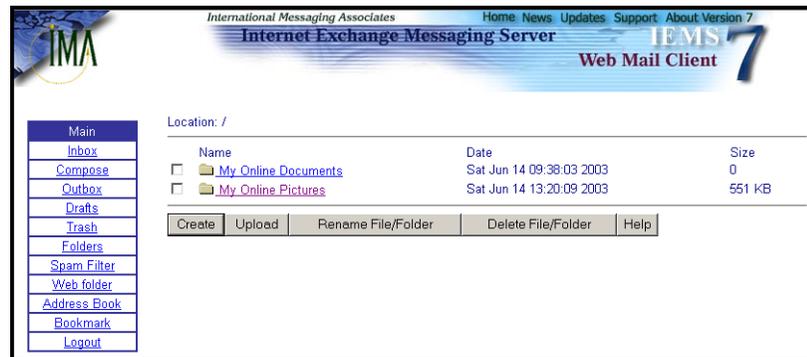


Figure 22: Web Folder Manager

The Web folder manager displays the name, date and size of each folder or file item in your Web folder. To access a sub-folder, just click on the name of that folder. Click the 'Back' button to go back to previous directory. When you select a file, your web browser may either start an application to open the file for you, or directly display the file in the browser window. If you are using either Internet Explorer or Netscape communicator, you can right click on the file name to save the file in your local computer.

New Folder Creation

Folders can be created anywhere in the users web folder storage area. Two folders are initially created at the time the account is established: **My Online Documents** and **My Online Pictures**. New folders can be created along side of these, or as subdirectories of these or other folders.

To create a new folder, go to the directory where you wish to create a new folder. When in the desired directory / folder, click the **Create** button. The following screen will be shown:



Figure 23: Web Folder Creation

Simply enter the name of the folder you wish to create, and click on the **Create** button to create the new folder.

Uploading Files

To upload a new file, first move to the directory which you wish the file to be stored. Once the folder that you wish to receive the file is being displayed, click the **Upload** button. This will bring up a display very similar to the Web Folder Creation screen. In the **Upload this file** window, type the name of the file you wish to upload. Alternatively, this can be searched for by clicking on the **Browse** button. Once the file has been identified, click on the **Send file** button to upload to your web folder directory.

File / Folder Renaming

To rename a folder or a file, first select the check box of the file or folder that you wish to rename. Then click the **Rename file/folder** button. This brings up the File / Folder rename screen. In the window with the label **Please enter new file name here:** type the new name for the file or folder selected. When done click on the **Rename** button to apply the name change.

Files / Folder Deletion

To delete folders or files, first select the check box(es) of the file(s) or folder(s) that you wish to delete. Then click the **Delete file/folder** button. Once you have clicked the delete button, the selected files and/or folders will be permanently removed from disk. Non-empty folders will not be deleted.

Spam Filters

Spam Filtering Overview

IEMS 7 introduces a new integrated Anti-Spam approach to message reception and delivery. The MTA Pass-Through technology employed by IEMS 7 allows end users (message store accounts), individual distribution list maintainers, and connector modules to define their own security profiles independent of the rest of the system. At the same time the messaging system administrator can still define an overall global security policy, where some anti-spam measures will be handled directly by the MTA (such as reliable DNS-BL identified traffic). Other measures which may be desired by part of the user community, such as DNS-BL's with known high false positive rates can then be passed through to the users for consultation on a case by case basis.

In most conventional messaging systems, security measures are employed on a system wide basis, making the choice of tools, such as DNS-BL's, critical. IEMS MTA Pass-Through technology changes this by allowing the administrator to be able to use many more countermeasures, enabling only those that have been proven to be universally effective at the MTA, or global level, and letting users pick and choose what additional measures they may or may not wish to apply to their individual message traffic.

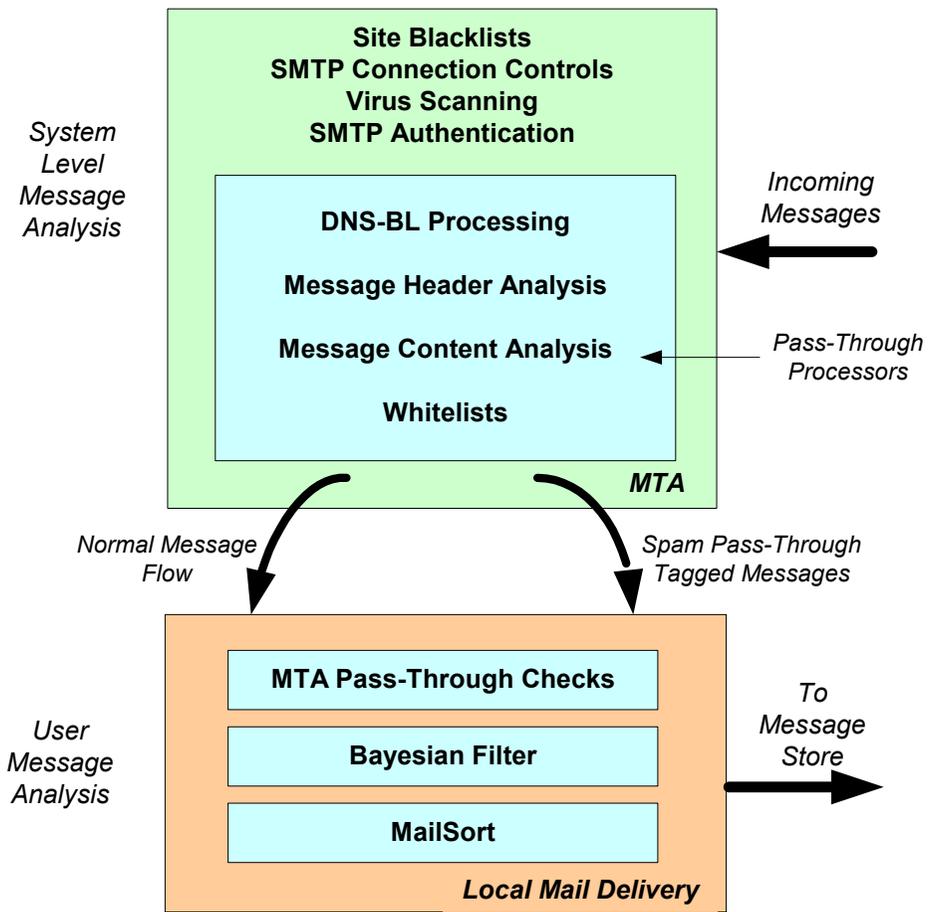


Figure 24: IEMS Pass-Through Architecture

System administrators are often caught in the middle of conflicting sets of requirements. On one hand, it is their responsibility to protect their organization and systems from outside (and sometimes inside) attacks from virus infected messages as well as spam. At the same time, they serve the users of these systems.

Traditional spam fighting techniques are performed by the MTA based upon policies set by the administrator. These global policies normally are set to ensure the maximum protection for the organization with minimal impact on the end user. In the case of spam detection and handling, the definition of what constitutes spam can vary widely from community to community, as well as from user to user within a single organization. Sales and marketing related messages may be very welcome in a sales group, while not being tolerated in a nearby engineering group. Advertisements pitching lower mortgage rates may be undesirable by most but a small group of people looking to purchase a new home. Viagra advertisements and other personal enhancement types of advertisements may not be at home for any users, especially if the site caters to the young or corporate users.

To assist the IEMS administrator in providing for both system security as well as keeping the collateral damage associated with improper spam detection and handling to an absolute minimum, several new tools can be applied. These can be applied on a system wide basis (global) and/or on an individual basis. Some tools such as virus scanning, certain SMTP connection controls, site-wide blacklists, and SMTP Authentication affect an entire site and are global in scope.

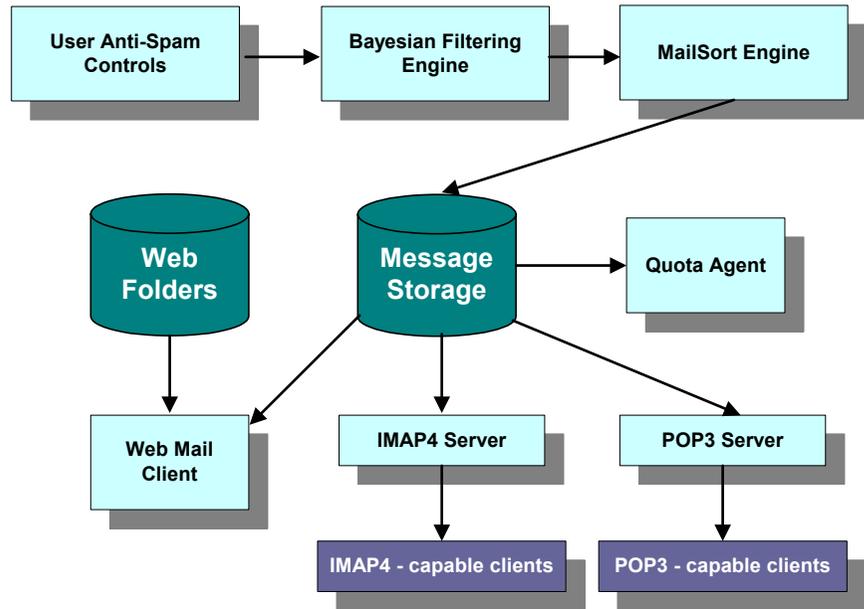


Figure 25: Local Mail Services

Others such as Bayesian Filtering and mail sorting based upon pattern matching are tools end users can apply. Other tools such as DNS Blacklists (DNS-BL), header analysis, and message content analysis occur within the MTA, however can be acted upon either as directed by a system security policy, or end user security policy. The ability for end users to be able to set security policies on actions normally only associated with system activities is made possible by the IEMS MTA Pass-Through features. These allow for the optional tagging of suspect messages by the MTA. The local mail delivery agent (working on behalf of the user) can then act upon these tagged messages later. This allows for both much more aggressive checking at the MTA level, as well as far more control of what messages are rejected at the user level (see Figure 24 above).

MTA Pass-Through

IEMS 7 Pass-Through technology allows the system administrator to be able to perform MTA level checks on messages, and then to optionally defer any action until being handled by an agent controlled by the end user. These agents are typically output channel processors, such as the Local Mail Delivery Agent, the Distribution List Processor, and others. As not all output channels are capable of handling deferred actions (such as the cc:Mail and Notes connector modules), the administrator can define default actions to be performed on a channel by channel basis, which will then be carried out by the preprocessor.

Local Services

Local services make up the modules and services not associated with message transport across the Internet (SMTP) or MTA switching. These include Distribution Lists, Message Storage and retrieval, user directed Anti-Spam measures, Web folders (storage), private address books, and Microsoft Outlook compatible calendaring / scheduling features. Messages are delivered into the local environment through the Distribution List manager and the Local Mail Delivery Agent (LMDA)

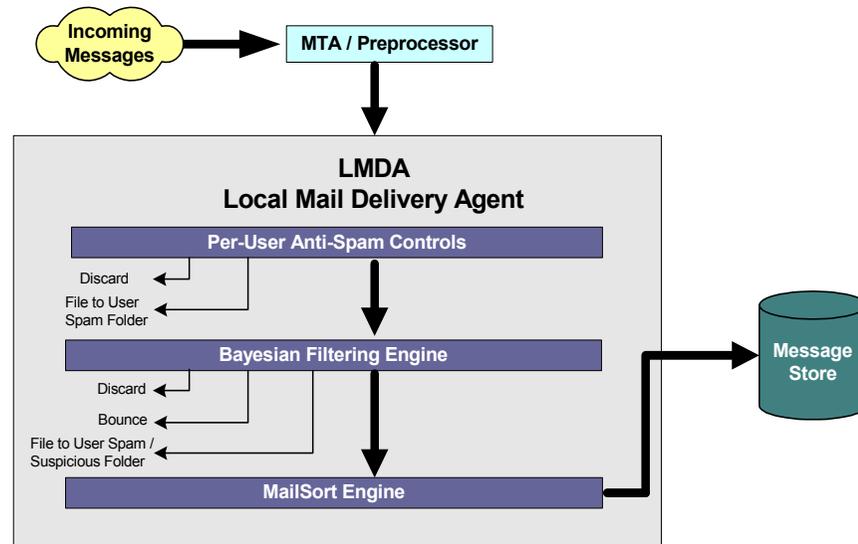


Figure 26: LMDA Architecture

The Local Mail Delivery Agent (LMDA) and the Distribution List Engine perform actions on behalf of their respective users (Message Store, and Distribution Lists). Both of these channel processors can be configured on a per DNS-BL basis as to what actions to perform. The LMDA components are shown in Figure 26. In addition to MTA Pass-Through processing, the LMDA can be configured to perform Bayesian messaging filtering on behalf of the user. This filtering technique utilizes per-user message databases made up of user identified spam as the basis for its message blocking. Users, using either the Web Mail Client, or any IMAP client can place received SPAM into a special folder where the system can later process and update the individual Bayesian Filter databases. After an initial learning phase, accuracy rates for Bayesian filters can exceed 98%.

The combination of SMTP controls, Content Filters, Bayesian Filters, DNS-BL's, and the extension of these controls to the end users allows for an extremely flexible protection system, designed to block the maximum number of problem messages.

Bayesian Filter

The Internet Exchanging Messaging Server provides an interface for system administrator to hook a "Bayesian filter" into the Local Mail Delivery Module (LMDA). Bayesian filters are statistical processes used to identify a spam mail message. For details about the operating principals of the Bayesian filter, please consult the article **A Plan For Spam** written by Paul Graham (<http://www.paulgraham.com/spam.html>), and **Better Bayesian Filtering** (<http://www.paulgraham.com/better.html>).

Bayesian Filter Learning Engine

Bayesian filtering is a statistical process that requires some training in order to obtain accurate results on spam message detection. In IEMS a program named "*bayesianlearn*" is provided for this purpose. When the *bayesianlearn* program starts, it performs the following tasks for each message store user:

- For each message in the good message folder it calls the Bayesian filter training engine to remove the message from the spam mail database and then adds it to the good mail database.
- For each message in the spam message folder it calls the Bayesian filter training engine to remove the message from the good mail database and then adds it to the spam mail database.

Message Reception

Messages that make it as far as the Bayesian filtering stage, and that pass the initial Bayesian filtering check are assumed by the system to be good, and non-spam. When this happens, the message is submitted to the training engine and added to the good database before being handed off to MailSort for final delivery. The word and frequency values in the good database are updated to reflect another good message received. If the message was determined to be spam, the message is submitted to the learning engine and the spam databases updated accordingly.

This system is designed to learn over time what a particular user considers good and what they consider spam. The good and spam databases will differ from user to user as their opinion of what is appropriate and not differs. When IEMS is first installed, there will be no record of good or bad messages, hence the system will treat all messages as being good in the absence of data to the contrary (the spam database).

When a user finds that a spam mail ends up in the inbox, he should move the message to the spam learning folder. The same applies for false positives (if any) that go incorrectly to the "my-spam" folder. When *bayesianlearn* starts up, it processes each message in the spam learn folder. For each message, it first removes it from the good database and adds the signature to the spam database. For good learn folder, it does the reverse.

IMPORTANT: To train the engine properly, **ALL** spam messages must be moved to the spam learning folder. The reason for this is that the system has already assumed that the received messages are good and updated the frequency count accordingly. If multiple identical spam messages are received, then the frequency count will be adjusted taking this into consideration. In order to correct this, each message must be subtracted from the good data-

SPAM FILTERS

base in addition to addition to the spam database. For example a user receives two spam message (A and B) that appear similar. He only moves one of them (Say B) to the spam learning folder. When *bayesianlearn* runs, it removes only B from the good database and adds it to the spam database.

Now, when message C which is the variant of A and B arrives, both good and spam database contain similar information of this spam pattern. Therefore, due to the bayesian design, the message C will be classified as good and added to the good database again. Thus, the engine is not properly trained.

For this case, we need to make sure that all spam messages, no matter if they look similar or not, are moved to the spam learn folder such that the message patterns are properly removed from the good database. It is also important to realize that the training of the bayesian engine takes time to learn. The accuracy rates are extremely high (in excess of 98% for properly trained databases), however it can take time to get enough spam data into the user databases.

One approach that can be used to offset spam in the inbox while undergoing initial Bayesian training, is to enable MTA Pass-Through on the DNS-BL and content filtering, and redirect these messages to the users system spam folder. These messages will not go through the Bayesian learning, however messages that are determined to be spam in the system spam folder (already pre-sorted by the system) can be added to the Bayesian learning folder for training.

Configuration

To configure your spam settings, click on the **Spam Filter** button in the main menu area. A screen similar to the following will be shown:

The screenshot shows the 'Spam Filter Configurations' page. At the top, there is a navigation bar with links for 'Home', 'News', 'Updates', 'Support', and 'About Version 7'. The main title is 'Internet Exchange Messaging Server' with 'IEMS 7 Web Mail Client' on the right. Below the title, there is a section for 'Spam Filter Configurations' with an 'Edit' button. The configuration is divided into three main sections:

- White list:** Includes an 'Edit' button.
- Action on system defined Spam message:**
 - Ignore
 - Discard
 - Bounce - Descriptions in the bounce message:
 - File to folder: (with a 'System block list configurations' button below it)
- Action on Spam message captured by Bayesian filter:**
 - Disable
 - Discard
 - Add X-Spam-Status header
 - Change subject line:
 - Bounce - Descriptions in the bounce message:
 - File to folder:
 - Spam message:
 - Undetermined message:
- Bayesian filter learning engine configurations:**
 - Good (non spam) message folder: (with a 'Start learning engine now' button)
 - Spam message folder: (with a 'Start learning engine now' button)

At the bottom, there are 'Save' and 'Help' buttons.

Figure 27: Spam Filter Configuration

The exact layout of the screen above will depend if you are running IEMS Standard Enterprise (SE) Edition or Professional Enterprise (PE) Edition, and what MTA Pass-Through configurations are enabled by the system administrator. For IEMS SE, none of the MTA Pass-Through options will be available, as they are not present on this version (PE Edition only).

The screen is laid out in three sections - user whitelists (all versions), MTA Pass-Through handling (PE Edition with administrator enabled controls), and Bayesian Filter configuration (all versions).

User Whitelists

There can be times where it is not desirable to apply spam filtering to messages. Examples include messages from friends, family, and close business associates. Messages from trusted sources such as these are usually desirable regardless of content. IEMS allows for the configuration of user whitelists, containing the email addresses of trusted senders where normal anti-spam filtering should not be applied. To configure user whitelists, click on the **Edit** button next to the *White List* tag on the top of the screen. The following screen will be displayed:

The screenshot shows the 'White list configurations' page in the IEMS 7 Web Mail Client. The page has a navigation menu on the left with links for Main, Inbox, Compose, Outbox, Drafts, Trash, Folders, Spam Filter, Web folder, Address Book, Bookmark, Logout, Options, Profile, Signature, Password, Mailsort, Schedules, Mailing List, List of Lists, Subscribe, and Unsubscribe. The main content area is titled 'White list configurations' and contains two sections: '1. Sender email address/domain' and '2. Sender IP address'. Each section has a text input field, a 'Remove' button, and an 'Add' button. At the bottom, there are 'Back to Spam filter configurations' and 'Help' buttons.

Figure 28: User White List Configuration

The White List Configuration is presented in two sections - *Sender Email Address Configuration*, and *Sender IP Address Configuration*. Both can be used and configured independently of the other.

To add the sender email address to the list of allowed senders, type the address under the *Add this address to whitelist* entry and then click the **Add** button. If you want to specify a domain, you can use the wildcard "*" character when entering the address. For example:

*@company.com

will white list all sender from the domain *company.com*.

SPAM FILTERS

To remove a sender, select the address from the address list and click the **Remove** button.

To add the sender IP (network) address, type the IP address under the *Add this IP address to whitelist* entry and then click the **Add** button. If you want to specify a range of IP address, you can use dash "-" character. For example:

192.168.0.0-192.168.0.255

will white list all IP address from 192.168.0.0 to 192.168.0.255.

To remove a sender IP, select the IP address from the address list and click the **Remove** button.

MTA Pass-Through Handling

Spam detection procedures that are applied within the MTA can optionally have action deferred until such time as an agent for the user (Local Mail Delivery) has control of the message. These MTA Pass-Through actions are defined in the second section of the Spam Filter configuration page. This section is identified by the label *Action on system defined Spam message* (See Figure 29).

Figure 29: MTA Pass-Through Configuration

A message can be marked as Spam by the Internet Exchange Message Server SpamAssassin plugin module, or reported by the DNS-BL lookups at SMTP connection time. When such a spam tagged message is received, you can configure your profile to perform one of the following actions:

Ignore - Ignore the spam message and continue normal delivery.

Discard - Discard the message such that your mailing list member will not receive this message.

Bounce - Bounce the message back to the sender.

File - File the message into a specific folder.

When bouncing a message, the text of the message sent back to the sender can be configured in the box below the **Bounce** selection. When automatically filing a spam tagged message, the folder to store such messages needs to be identified in the *File to folder* input box.

When there is one or more DNS-BL host defined in the system, the **System black list configurations** button will be displayed. Click this button to configure specific actions to perform on a per DNS-BL tagged message basis

(see Figure 30). In this page, you can define action against spam message marked by certain DNS-BL host.



Figure 30: User DNS Black List Configuration

When there is one or more DNS-BL host defined in the system, this configuration page will be available. You can different actions against each DNS-BL host in your server to refine your spam filter behavior. To configure, first select a DNS-BL host name and then click the **Edit** button. For each DNS-BL host, you can select one of the following actions:

Ignore - Ignore the spam message and continue normal delivery.

Discard - Discard the message such that your mailing list member will not receive this message.

Bounce - Bounce the message back to the sender.

File - File the message into a specific folder.

When bouncing a message, the text of the message sent back to the sender can be configured in the box below the **Bounce** selection. When automatically filing a spam tagged message, the folder to store such messages needs to be identified in the **File to folder** input box.

Bayesian Filter Configuration

Bayesian Filtering is used to apply user specific rules against incoming messages. The Bayesian filter can be trained by the user to understand the types of messages that are undesirable on an individual basis. See the preceding section for a more in-depth discussion.

The Bayesian Filter configuration can be identified by the portion of the Spam Filter page shown in Figure 31. This section will only be displayed if the system administrator has enabled Bayesian filtering.

SPAM FILTERS

Figure 31: Bayesian Filter Configuration

The Bayesian filter works by compiling characteristics of messages that each user tells it is spam. When mail is received that is not desired, the user needs to move this to the spam learning folder. This can be done manually when using IMAP configured mail clients, or by selecting **Mark this as a spam message** from within the IEMS Web Mail Client view message screen. The system will periodically check the contents of this folder for new messages and update the user Bayesian filter database.

When messages are received, the Bayesian filter consults the user Bayesian filter database and compares the incoming message against information stored in the database. The filter uses a statistical process to determine the probability that an incoming message should be considered spam for a particular user. Messages identified as spam are acted upon based upon the users Bayesian Filter configuration as follows:

Disable - Don't run Bayesian filter

Discard - The message will be dropped.

Add X-Spam-Status header - A special header "X-Spam-Status: YES" will be added to the message. If you are using POP3 based email client that can define rule to filter message contains this "X" header, you can use this option and setup a rule to filter the spam message to a different local folder on your client system. If your filter does not support the "X" header field, you should consider to use the Change Subject Line option instead.

Change Subject line - Change the message Subject line to a sentence defined by you. If you are using POP3 based email client, you can set up filtering rule to file message with this subject line to a different local folder.

Bounce - Bounce the message back to the sender, you can define a short description that will be included in the return message.

File to folder - You can file the Spam message to a different folder in the server. You can define two folders here, one for storing spam message and the other for storing undetermined mes-

sage (message that neither look good or as spam). If you are using IMAP based client, you should consider to use this option.

Bayesian filter learning engine configurations

The Bayesian filter needs training before it can accurately detect a spam message. Initially, you may get false negative or false positive results from the Bayesian filter (Note: false negative means a spam message was incorrectly labelled as a good message; false positive means a good message was incorrectly labelled as a spam message).

Two folders need to be defined for the Bayesian Filter engine, one for storing received spam messages and the other to store messages that have incorrectly been identified as spam (good messages). On the server, there will be a training program that runs periodically to update your good and spam message list. The more sample message you have in these folders, the more accurate the result can be obtained by the Bayesian filter.

You can click the "Update Database Now" button to train your Bayesian filter immediately. Depending on the number of messages in the good and spam message folders, this process may takes seconds to minutes to complete.

Address Book

When composing messages, users can either manually specify recipient addresses, or consult a private address book, or one or more global address books. Personal address books are unique to each user, and are not sharable. Global address books are shared resources, either within an organization, or globally accessible. Private address books are maintained by each individual user, while global address books are maintained by system administrators.

Global Address Books

There are two types of global address books accessible by Web Mail Client users - the local IEMS directory and external LDAP-enabled directories. Access to the local IEMS directory is automatically available to all IEMS users. Access to remote LDAP-enabled directories must be configured by the IEMS administrator.

The IEMS administrator can configure the global LDAP directory servers by adding entries to the IEMS configuration file (*/etc/iems.conf* under Linux, and *iemta.ini* under Windows). Different directory servers can be configured for each language supported. The configuration file entry is located under the *[WebClient]* section and the format is:

```
locale-localhostN=fqdn_of_ldap_server
```

where locale refers to the language supported (i.e. *en-us*, *zh-cn*, or *zh-hk*). N is the sequence number for the LDAP server. For example:

en-us-ldaphost1=ldap.bigfoot.com
 en-us-ldaphost2=ldapbiz.infospace.com
 en-us-ldaphost3=ldap.infospace.com
 en-us-ldaphost4=ldap.whowhere.com
 en-us-ldaphost5=directory.verisign.com

Personal Address Book

The personal address book is used by Web Mail Client users to keep track of the names and addresses of people they communicate with. This information can then be easily referenced when composing or replying to messages.

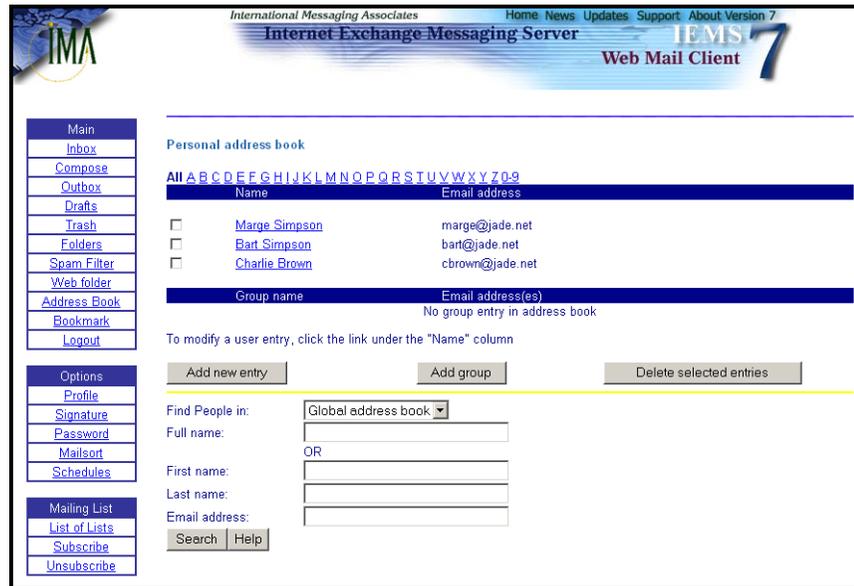


Figure 32: Personal Address Book

To access the personal address book, click the **Address Book** button in the main menu. This option displays the “Personal Address Book” screen (see Figure 32 on page 34). The names and addresses of personal contacts can be seen from here. New entries can be added either manually, or from the results of searching global address books.

Adding New Address Book Entries

To add a new address entry to your personal address book, click on the **Add new entry** button from the main address book page. The following page will be displayed for entry of the new entry:

International Messaging Associates Home News Updates Support About Version 7
Internet Exchange Messaging Server IEMS 7
 Web Mail Client

Main
[Inbox](#)
[Compose](#)
[Outbox](#)
[Drafts](#)
[Trash](#)
[Folders](#)
[Spam Filter](#)
[Web folder](#)
[Address Book](#)
[Bookmark](#)
[Logout](#)

Options
[Profile](#)
[Signature](#)
[Password](#)
[Mailsort](#)
[Schedules](#)

Mailing List
[List of Lists](#)
[Subscribe](#)
[Unsubscribe](#)

Personal address book

General
 First name
 Last name
 Nick name
 Email address
 Spouse's name
 Anniversary
 Birthday

Home
 Street
 Postal code
 Phone
 Fax
 Mobile phone
 Web page

Business
 Company
 Job title
 Department
 Office
 Street
 Postal code
 Phone
 Fax
 Pager
 Web page

Others
 IM address

Notes

Figure 33: Adding New Address Book Entries

Simply enter the name and email address of the new contact in the provided areas and click the **Add to my address book** button when done.

Deleting Existing Address Book Entries

To delete an existing entry from your personal address book, first select the address(es) you want to remove by clicking on the checkbox aside the entry. Multiple selection of address entries is allowed. Then click on the button **Delete selected entries** to remove the selected addresses.

Editing Existing Address Book Entries

To edit an existing entry in your personal address book, click on the "Name" field of the entry. A page similar to the following will be presented:

International Messaging Associates Home News Updates Support About Version 7
Internet Exchange Messaging Server IEMS 7
Web Mail Client

Main
[Inbox](#)
[Compose](#)
[Outbox](#)
[Drafts](#)
[Trash](#)
[Folders](#)
[Spam Filter](#)
[Web folder](#)
[Address Book](#)
[Bookmark](#)
[Logout](#)

Options
[Profile](#)
[Signature](#)
[Password](#)
[Mailsort](#)
[Schedules](#)

Mailing List
[List of Lists](#)
[Subscribe](#)
[Unsubscribe](#)

Personal address book

First name **General**
 Last name
 Nick name Email address
 Spouse's name
 Birthday Anniversary
 Street **Home** Postal code
 Phone Fax
 Mobile phone Web page
 Company **Business** Job title
 Department Office
 Street Postal code
 Phone Fax
 Pager Web page
 IM address **Others**

Notes

Save changes to my address book
 Cancel Help

Figure 34: Editing An Existing Address Book Entry

When finished with the changes, click on the **Save changes to my address book** button to make the changes permanent.

Searching Local and Global Directories

To search for people from local or global directories, enter the name or the email address in the corresponding fields and click on the **Search** button to start the search. In our example below, we are searching for all people with the name of Simpson in the local directory:

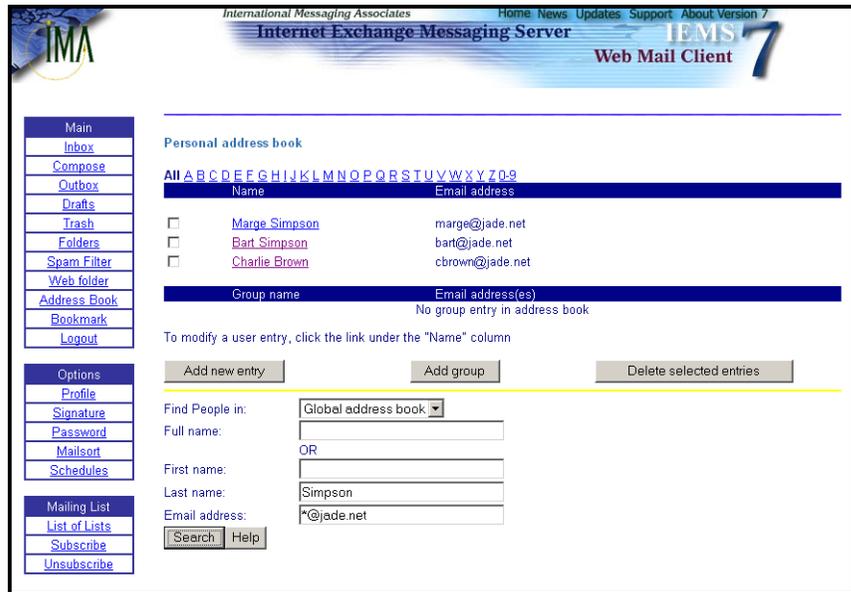


Figure 35: Searching the Local Directory (1)

The results of this search revealed three local directory entries:

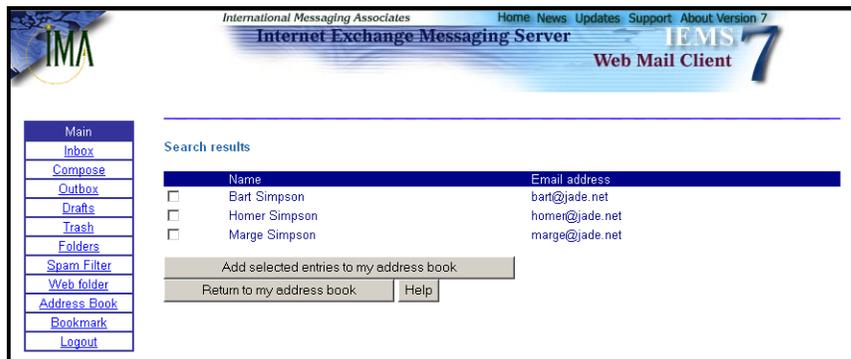


Figure 36: Searching the Local Directory (2)

To add an entry to your personal address book, click on the checkbox aside from the entry or entries to be added. Multiple selection of entries is allowed. Click on the **Add selected entries to my address book** button complete the operation.

Using the Address Book When Composing Messages

When composing, replying, or forwarding a message, if you wish to select addresses from your personal or global address books, click on the **Address Book** button (see Figure 13 on page 16). A screen similar to the following will be shown:

The screenshot shows the 'Personal address book' section of the web mail client. On the left is a navigation menu with links for Main, Inbox, Compose, Outbox, Drafts, Trash, Folders, Spam Filter, Web folder, Address Book, Bookmark, Logout, Options, Profile, Signature, Password, Mailsort, Schedules, Mailing List, List of Lists, Subscribe, and Unsubscribe. The main content area is titled 'Personal address book' and contains a list of contacts: Marge Simpson <marge@jade.net>, Bart Simpson <bart@jade.net>, and Charlie Brown <cbrown@jade.net>. Below the list are three buttons: '->To', '->Cc', and '->Bcc'. A search section below these buttons includes a dropdown menu for 'Find People in:' set to 'Global address book', a 'Full name:' field, an 'OR' separator, 'First name:' and 'Last name:' fields, an 'Email address:' field, and a 'Search' button. At the bottom of the search section are 'Complete' and 'Help' buttons.

Figure 37: Address Book: Entry Selection

To select entries from the personal address book, simply click on the desired entries, and then on the corresponding **->To**, **->Cc**, or **->Bcc** buttons. To add entries from a global directory, enter the search criteria in the *Name* and *Email address* fields and click on the **Search** button. After receiving the search results, recipients can be selected and added to the *To*., *Cc*: and *Bcc*: fields in the same manner as personal address book entries. When done selecting recipient addresses, click on the **Complete** button to return to the message composition screen with your new selections.

SIGNATURES

Signatures

Standard signatures can be automatically appended to all messages sent by the Web Mail Client. One or more signatures can be created and stored in the system, for later inclusion when composing messages. To create or edit an existing signature or signatures, click on the **Signature** button in the main menu area. If this is the first time you have run this, you will need to then click on the **Add Signature** button to continue. The following screen will be shown:

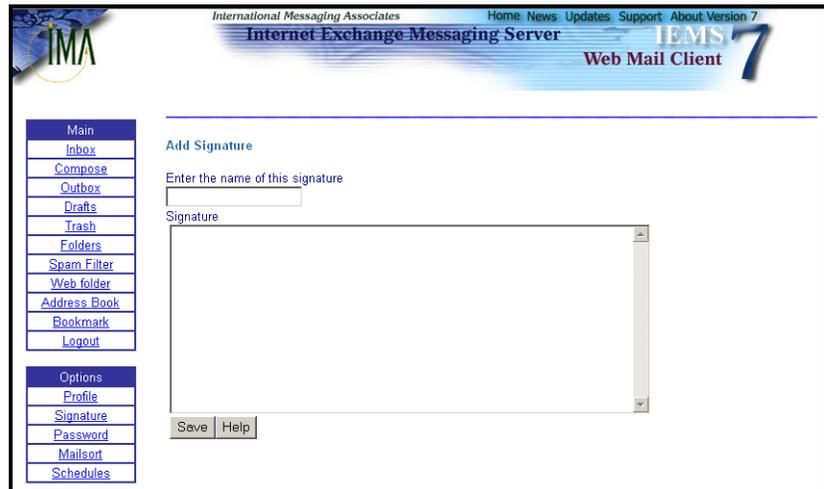


Figure 38: Adding / Changing Signature

To add a new signature, click on the **Add Signature** button. To change an existing signature, select the signature to change in the **Available signatures** selection box and then click on the **Modify Signature** button.

When adding a new signature, the screen will prompt for the name of the signature. This name is used to identify the signature when composing new messages. The first or oldest signature configured will become the default in the message composition screen. When modifying an existing signature, the signature name will be shown at the top of the screen. To add or change your signature, add/edit the text of your signature in the text area. When done, click on the **Save** button to save your new signature. This text will then be appended to all mail sent using the Web Mail Client.

To remove a signature from the system, select the signature to delete from the list of **Available signatures**, and then click on the **Delete Signature** button.

PASSWORD MAINTENANCE

Password Maintenance

To change your Web Mail Client password, click on the **Password** button in the main menu area. The following screen will be displayed:

Figure 39: Changing User Password

To change your password, enter the new password in the **New Password** and **Confirm Password** fields, and then click on the **Update** button to save.

Bookmarks

Most modern web browsers provide the ability to store information about favorite sites across the Internet. These are referred to as bookmarks, and are usually built into the browser and stored on the local workstation. The IEMS Web Mail client also provides bookmark capability where favorite web sites or FTP URL's can be stored. The use of IEMS bookmarks has the advantage that the storage is on the network and independent of any browser. In addition, bookmark information can then be accessed from any PC that has access to the IEMS server.

To access your bookmarks, or to create new bookmarks, click on the **Bookmark** button in the main menu area. The Bookmark Display screen will be shown (see Figure 40).

Figure 40: Bookmark Display

BOOKMARKS

For each bookmark, you can assign a short description to the URL and group the URLs into different categories for easy management. The Bookmark display is sorted by Categories, which are user defined. Each bookmark contains a URL as well as a textual description.

To create a new bookmark, click on the **Add new bookmark item** button on the main bookmark screen. The following screen will be displayed:

The screenshot shows the 'Add a new bookmark' form in the IEMA Web Mail Client. The form is titled 'Add a new bookmark' and is located on the 'Bookmark' page. The form contains the following fields and buttons:

- Category:** A dropdown menu with 'News Sites' selected.
- New category:** A text input field.
- URL:** A text input field containing 'http://'.
- Descriptions:** A text input field.
- Buttons:** 'Save', 'Cancel', and 'Help' buttons.

The navigation menu on the left side of the page includes the following items:

- Main
- Inbox
- Compose
- Outbox
- Drafts
- Trash
- Folders
- Spam Filter
- Web folder
- Address Book
- Bookmark
- Logout

Figure 41: Add Bookmark

As bookmarks are sorted by Category, a category must be associated with each new bookmark. Simply pick from an existing category in the Category box, or enter the name of a new category you wish to create in the **New Category** box. After supplying the URL and Description information in the remaining boxes, click on the **Save** button to store your new bookmark and return to the main bookmark page.

To read bookmarks under certain category, just click the name of the category in the 'Category' column. To visit a bookmark, just click on the link on the URL column. If you want to change the description or category of a bookmark item, simply select the link in the 'Description' column.

USER PROFILE

User Profile

Information regarding each IEMS user is stored in the local directory. This information can include the following: *First Name*, *Last Name*, *Telephone Number*, *Address*, and *Email Address*. Most of these fields are set by the local system administrator and cannot be changed by the user. The *Telephone Number* and *Address* fields however are available for edit by each user.

To view your profile information, click on the **Profile** button in the menu area. A screen similar to the following is displayed:

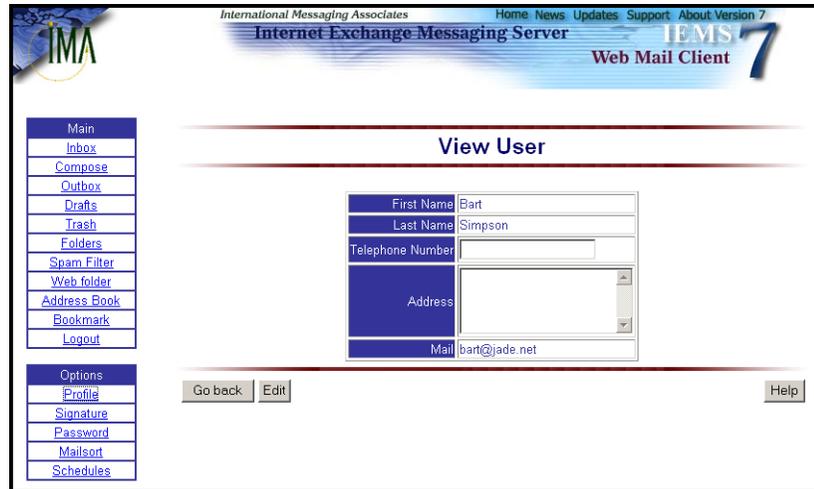


Figure 42: Updating User Profile

To edit either the *Telephone Number* and/or *Address* fields, click on the **Edit** button to get to the “Edit User” page. After entering the necessary changes, click on the **Update** button to save the changes in the IEMS directory.

MAILSORT

Mailsort

The Web Mail Client user interface allows Message Store users to define rules so that their mail can be directed to pre-selected mailboxes or folders other than their Inbox, or selectively forward messages to other addresses. Users may define when to process incoming mail at message delivery time based on certain attributes (i.e., message sender, recipient or subject). Rules defined here are applied to all messages received by the user's account, regardless of access method (WMC, IMAP, or POP3)

The Mailsort filtering utility allows users to create rules that will define the behavior of the Local Mail Delivery Agent (LMDA) towards their incoming messages. Users can create rules that tell the LMDA how to sort their mail or how to filter out unwanted message, like spam.

Creating Filter Rules

To configure the Message Store's Mailsort utility, click the **Mailsort** button found in the main menu area. If no existing filter rules have been defined, the "Mailsort Start" screen will be displayed. Click the **New** button. The "Mailsort New Filter" screen should now appear (see Figure 44 on page 44).



Figure 43: Mailsort Start

Select a header field (**From:**, **To:**, **Cc:**, **Bcc:**, **Subject:**) from the header drop-down menu. The header field selected would be the basis for filtering the messages. The Mailsort utility scans this field for a pattern specified, which may be a word, phrase or email address.

In the text box opposite the header field drop-down menu, specify the pattern that the Mailsort utility will search for. Mark the radio button of the action (**move to**, **copy to**, **forward to**, **send vacation message**, **reject**) that the Mailsort utility will apply upon encountering messages that meet the defined pattern or criteria. To configure the filtering action, select either Yes or No. Selecting Yes instructs Mailsort to filter messages from the first rule up to the last filter rule. This means that once a filter is matched, the Mailsort engine will continue to process the succeeding filter rules. Selecting **No** disables certain filters and tells Mailsort to stop the filtering process once a filter is matched. Click the **OK** button for the filter rule to take effect.

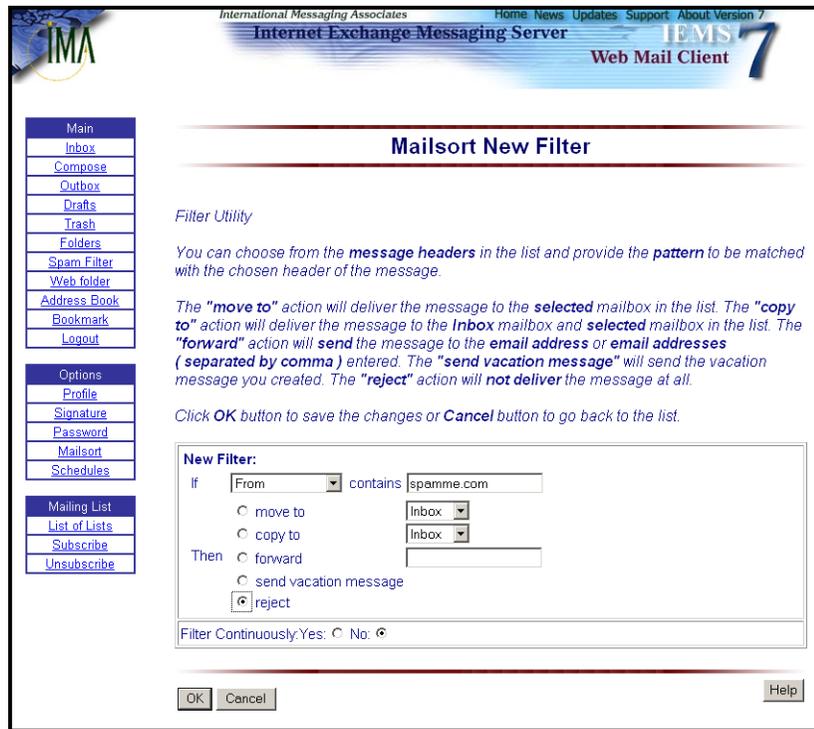


Figure 44: Mailsort New Filter

Using the example given above, the Mailsort engine will scan the header **From:** field of incoming messages to search for the string “spamme.com”, which is entered in the **contains** text box. Once this pattern is matched, the Mailsort engine will tell the LMMA to reject messages that meet the defined criteria.

Once an initial filter is created, the “Mailsort Filter Information” screen (see Figure 45 on page 45) appears instead of the “Mailsort Start” screen. This screen displays the initial rule together with its **Add, Exit, Vacation Message, Edit, Delete** and **Help** buttons. The **Move Up** and **Move Down** buttons appear only if there is a minimum of three filtering rules listed.

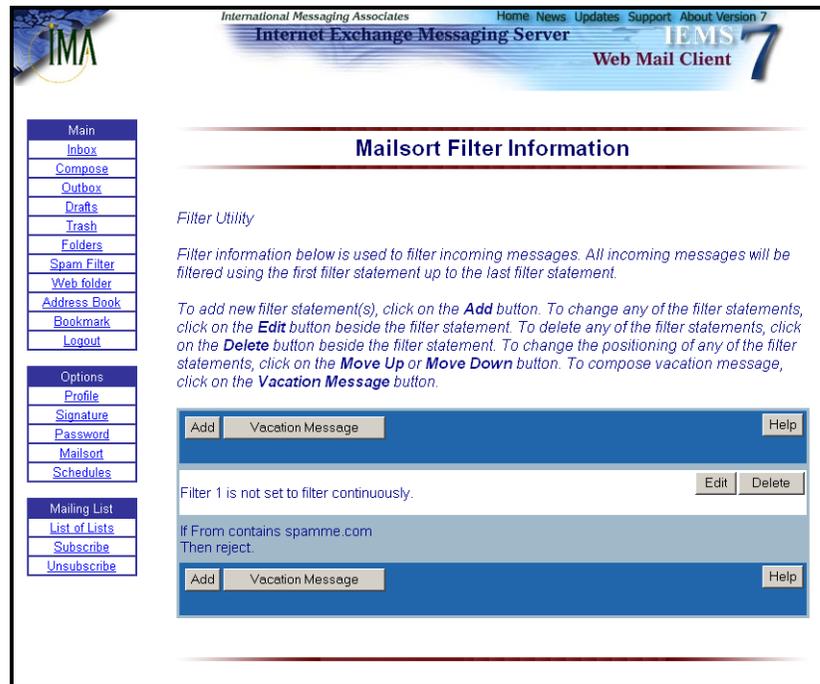


Figure 45: Mailsort Filter Information

Adding Filter Rules

To add a filter rule, click the Add button from the “Mailsort Filter Information” screen (see Figure 45 on page 45). The “Mailsort Add Filter” screen (see Figure 46 on page 46) contains similar information as the “Mailsort Start” screen. Since adding a filter rule is the same as creating a filter rule, simply follow the procedure given in “Creating a Filter Rule” on page 43. The new rule will be added in the filter file and displayed in the “Mailsort Filter Information” screen with its respective command buttons.

International Messaging Associates Home News Updates Support About Version 7
Internet Exchange Messaging Server IEMS 7 Web Mail Client

Mailsort Add Filter

Filter Utility

You can choose from the **message headers** in the list and provide the **pattern** to be matched with the chosen header of the message.

The "**move to**" action will deliver the message to the **selected** mailbox in the list. The "**copy to**" action will deliver the message to the **Inbox** mailbox and **selected** mailbox in the list. The "**forward**" action will **send** the message to the **email address** or **email addresses** (**separated by comma**) entered. The "**send vacation message**" will send the vacation message you created. The "**reject**" action will **not deliver** the message at all.

Click **OK** button to save the changes or **Cancel** button to go back to the list.

Add Filter:

If contains

move to

copy to

Then forward

send vacation message

reject

Filter Continuously: Yes: No:

OK Cancel Help

Figure 46: Adding Filter Rules

Deleting Filter Rules

Users can remove filtering rules that are no longer needed, or rules mistakenly created by clicking the Delete button beside the **Edit** button of every filter rule listed in the "Mailsort Filter Information" screen (see Figure 45 on page 45).

Editing Existing Filter Rules

Information contained in existing filter rules can be changed or updated using the "Mailsort Filter Information" screen (see Figure 45 on page 45). Users with existing filter rules are automatically brought to this window upon logging on to Mailsort.

To display and edit a filter block, click the Edit button for that particular filter block. This action displays the "Mailsort Edit Filter" screen (see Figure 47 on page 47).

On the Edit page, users can update one filter data at a time. Please see "**Creating a Filter Rule**" on page 43.

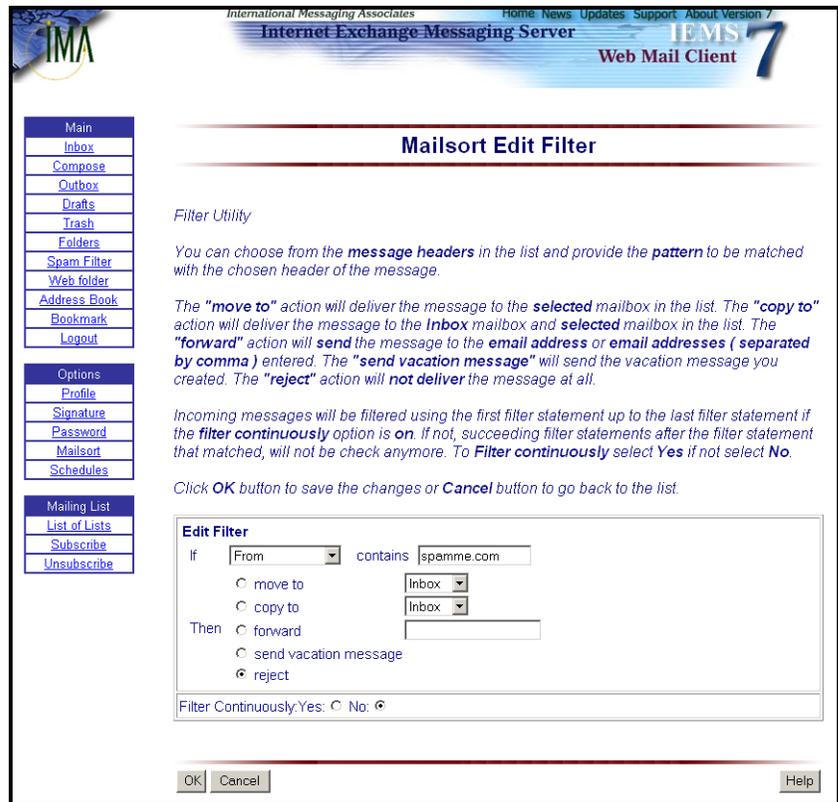


Figure 47: Editing an Existing Filter Rule

Positioning Filter Rules

The order by which the filtering rules are listed in the “Mailsort Filter Information” screen is crucial to the filtering process because the LMDA applies these rules according to how they are positioned. Users can position these rules by clicking the Move Up or Move Down buttons of these rules in the “Mailsort Filter Information” screen (see Figure 45 on page 45).

Automatic Vacation Messages

The Mailsort vacation utility allows users to send automatic replies to incoming messages. This feature is especially useful when on leave or are not able to reply to messages for an extended period of time. This option is available on the screens for creating or editing filter blocks.

To activate the vacation utility, click the Vacation Message button from the “Mailsort Filter Information” screen (see Figure 45 on page 45). The “Mailsort Vacation Message” screen (see Figure 48 on page 48) appears. Type the message subject and compose the body of the (vacation) message that needs to be sent out. This message will be used when replying to incoming messages. Click the **Save** button.

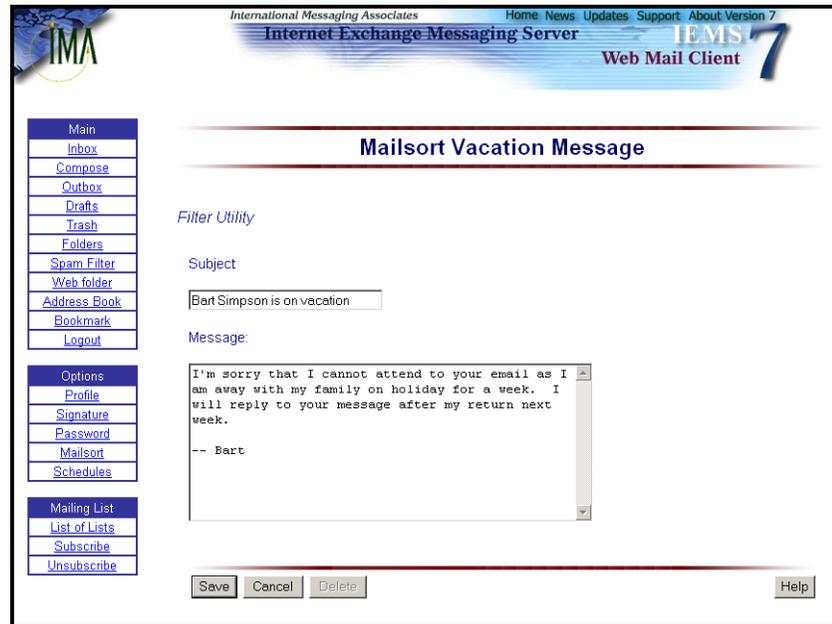


Figure 48: Creating a Vacation Message

Then, go to the “Mailsort Filter Information” screen and click the **Add** button. The “Mailsort Add Filter” screen (see Figure 46 on page 46) appears. Select the **To:** header from the **If** pull-down menu. Enter email address in the contains field. Click the **Send Vacation Message** option and select **Yes** from the **Filter Continuously** option. Click the **OK** button.

Note: *The vacation utility by default is configured to send a vacation message to a specific sender once within seven days. If the vacation utility already sent a vacation message to a particular sender, and receives messages again from that sender, it will no longer send a vacation message to that sender until after seven days. The vacation utility will not generate a vacation message for messages generated by standard distribution lists.*

Schedules

The Professional Enterprise Edition of IEMS provides backend server support for the Microsoft Outlook 98 / 2000 calendaring and scheduling features. In particular, a public file server is provided for the publishing of Internet Free/Busy (IFO) information. Outlook users can share calendaring information between themselves, and schedule meetings via Internet email.

Microsoft Outlook Internet Free / Busy Feature

The Internet Free/Busy (IFO) feature of Outlook 98 / 2000 (Internet Mail Only mode) allows users to see when others are free or busy in order to efficiently schedule meetings. Users publish their busy/free information to an IEMS shared file server. Each user’s schedule information is published at a unique URL specific to the individual. Users can then share the information at this location with all users, or any specific users determined by each user.

Access to busy/free information is controlled through the configuration information supplied by each user to the IEMS file server.

IEMS Free/Busy Server

Individual Free/Busy information is published from Outlook to an IEMS Free/Busy Server. This server is implemented as a specialized FTP server residing on the IEMS host. All access to information on the IEMS server must be authenticated by providing login information (done through the individual Outlook configurations). This login information is authenticated against account information stored in the IEMS Directory. Once authenticated, users can update their schedules, or access other's schedules, provided they have appropriate access rights. For more information on IEMS support for Outlook compatible calendaring and scheduling, please see Appendix A - "Introduction to Outlook 98/2000 Free/Busy Features" on page 75.

Users control access rights to their free/busy schedules through the Web Mail Client. Using this simple interface, users can easily create and maintain access control lists of users permitted to view the free/busy schedule information.

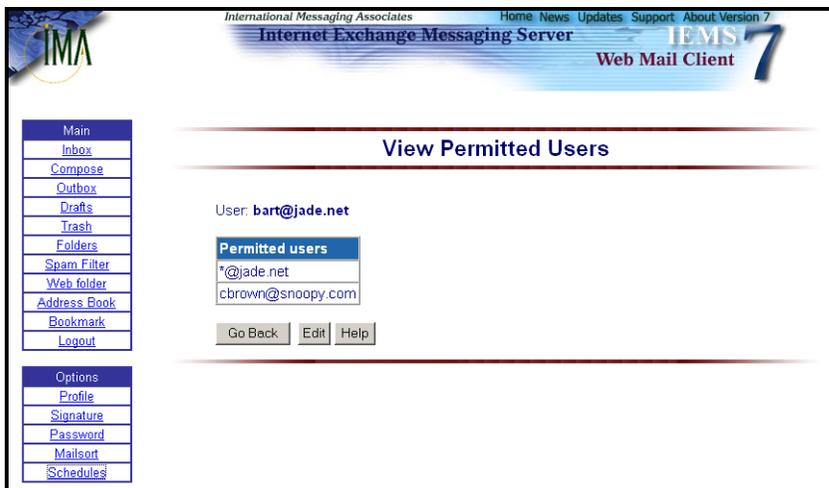


Figure 49: View Permitted Users

To configure the Free/Busy schedule access controls, click on the **Schedules** button in the menu area (Professional Enterprise edition only). This brings up the "View Permitted Users" display (see Figure 49 on page 49). This screen displays a list of users (email addresses) who are permitted to access the free/busy schedule information for logged in user. The wildcard characters '*' and '?' are permitted in the addresses. In our example for Homer Simpson, all users in the domain *jade.net* are allowed access. In addition, the user *cbrown@snoopy.com* is also allowed access to Homer's free/busy schedule.

To add or otherwise modify the permitted users access control list, click the **Edit** button. This brings up the "Edit Permitted Users" display (see Figure 50 on page 50).

DISTRIBUTION LISTS

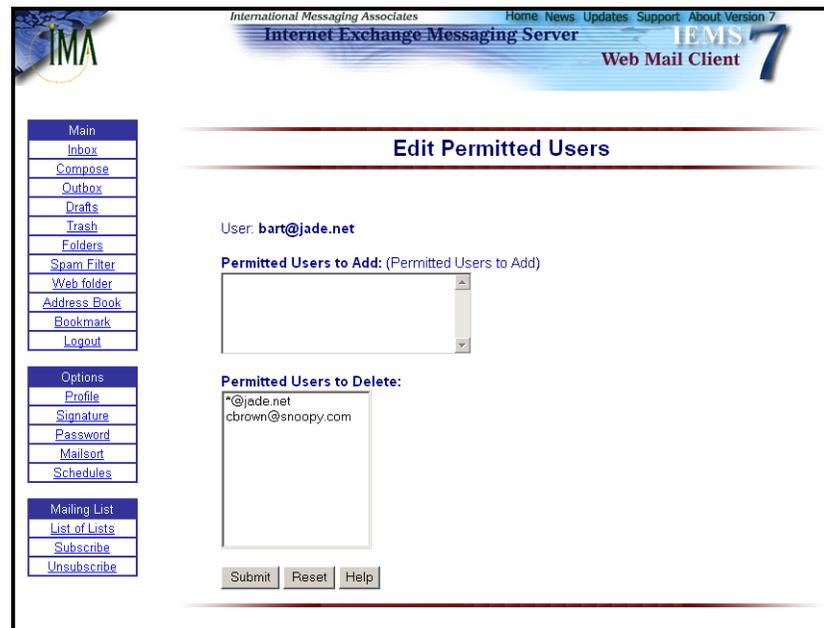


Figure 50: Edit Permitted Users

After selecting users to either add (*Permitted Users to Add* text box), or delete (*Permitted Users to Delete* text box), click the **Submit** button to save the changes.

Distribution Lists

Distribution Lists, otherwise known as electronic Mailing Lists, are available with the Professional Enterprise (PE) edition of IEMS. Using the Web Mail Client, users can view what lists are available in the local IEMS system, as well as manage their subscriptions.

Available Mailing Lists

To see what lists are locally available, click on the **List of Lists** button in the menu area. If any list are configured, the “Available Mailing Lists” screen is displayed (see Figure 51 on page 51).

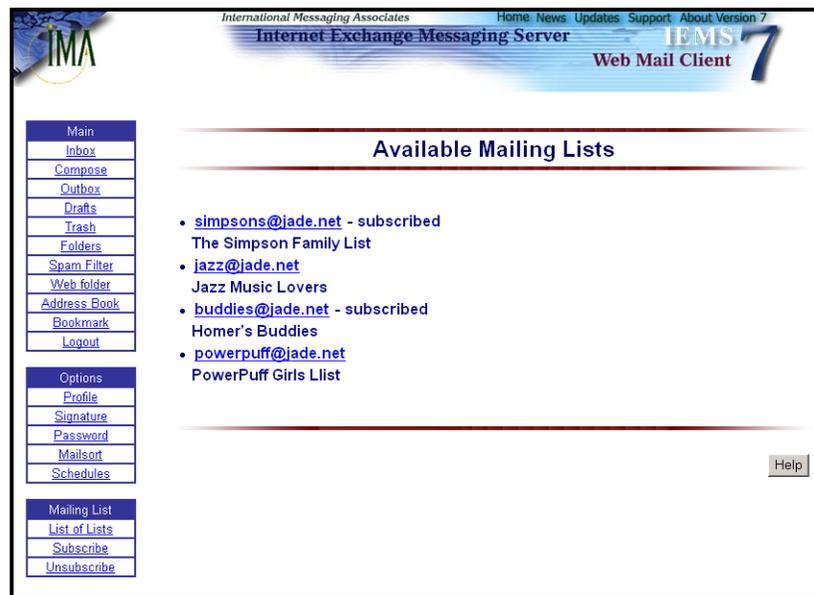


Figure 51: Available Mailing Lists

Each lists present in the system is listed, together with its email address and description. The list also indicates if a given list is currently subscribed to. By clicking on any of the addresses for existing lists, the corresponding summary information for that list is displayed (see Figure 52 on page 52).

For lists that are currently unsubscribed to, the user has the option in the "Mailing List Summary" page to subscribe to the list. If the list is currently subscribed to, the user can unsubscribe here. After selecting the desired operation (*Subscribe - immediate delivery*, *Subscribe - digest delivery*, or *Unsubscribe*), click the **Submit** button.

Distribution List Manager Confirmation Messages

When subscribing to a new list, or unsubscribing from an existing list, the Distribution List Manager will send a confirmation message back to the user. This message is to validate the identity of the requestor and to ensure that bogus subscriptions are not entered into the system. When the confirmation message is received, simply reply to the message with the single work "OK" in the body of the replied message. When received by the Distribution List Manager, the user will then be subscribed or unsubscribed per the original request.

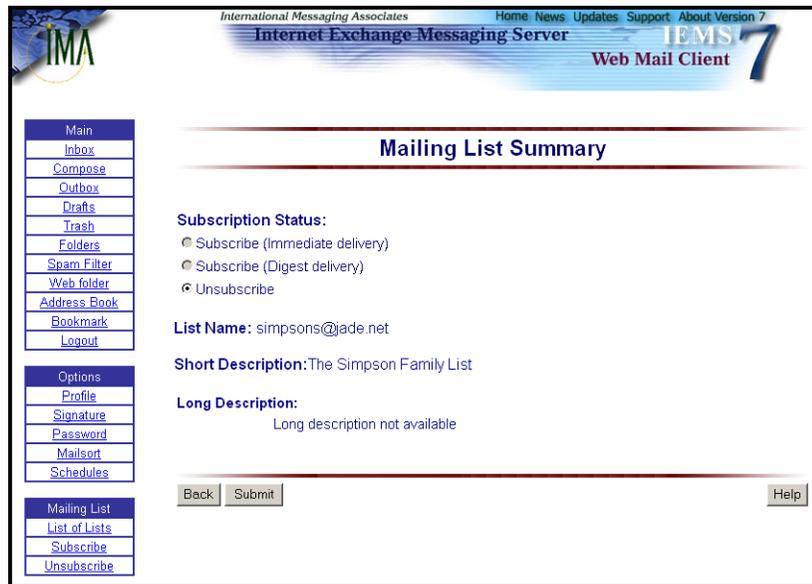


Figure 52: Mailing List Summary

Subscribe

When subscribing to more than one mailing list, it can be simpler for Web Mail Client users to go directly to the 'Subscription Form' page. This can be brought up by clicking on the **Subscribe** button in the menu area. A page similar to the following is then displayed:

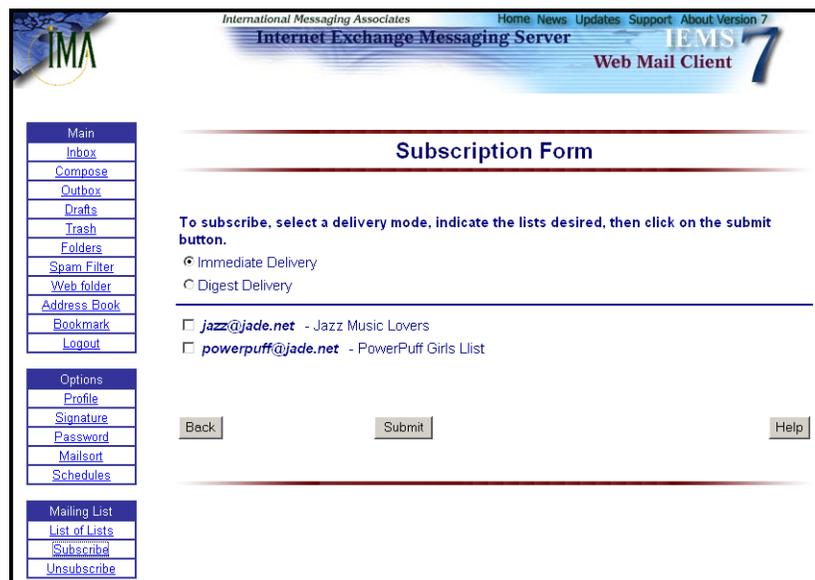


Figure 53: Subscription Form

Instead of listing all mailing lists on the system as in the previous section, this page only lists those lists which are not subscribed to. To subscribe to one

UNSUBSCRIBE

or more lists, simply click the checkbox next to the desired list or lists and then select the **Submit** button. Be sure to indicate the subscription delivery mode. The default is *Immediate Delivery*, however for high volume lists *Digest Delivery*, where daily traffic is accumulated in a single message may be more desirable.

When the subscription request is processed by the Distribution List Manager, a confirmation message is sent back to the user to complete the process (See “Distribution List Manager Confirmation Messages” on page 51.)

Unsubscribe

When unsubscribing to more than one mailing list, it can be simpler for Web Mail Client users to go directly to the 'Unsubscribe From Lists' page. This can be brought up by clicking on the **Unsubscribe** button in the menu area. A page similar to the following is then displayed:

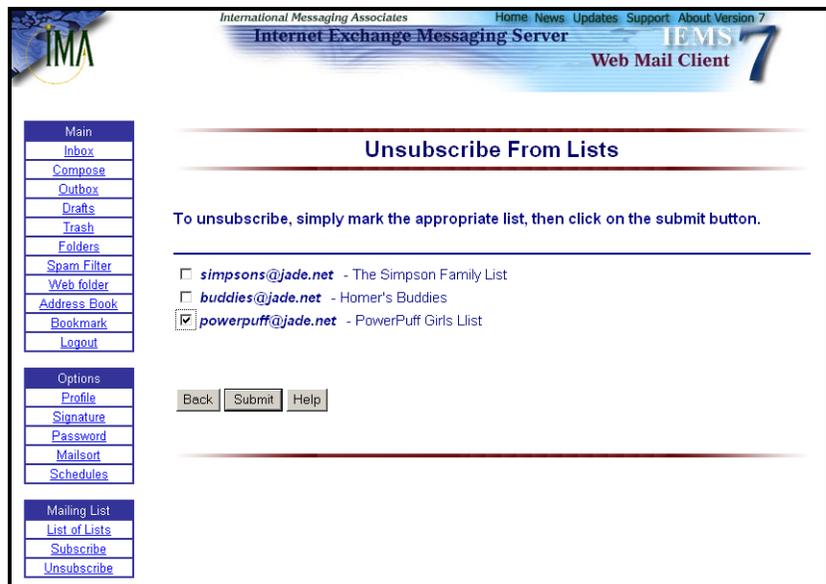


Figure 54: Unsubscribe From Lists

To unsubscribe from one or more lists, simply click the checkbox next to the desired list or lists and then select the **Submit** button. When the subscription request is processed by the Distribution List Manager, a confirmation message is sent back to the user to complete the process (See “Distribution List Manager Confirmation Messages” on page 51.)

LOGIN / LOGOUT

**Login /
Logout**

When finished using the Web Mail Client, it is advisable to log the session out. This is to prevent other users being able to use the same PC and gain access to your email. Login sessions do have timers associated with them, which will eventually time out and force re-login, this does not prevent access a short time after finishing a session.

To logout your session, click on the **Logout** button in the main menu area. The “IEMS Logout Page” is then displayed allowing the client system to login again as another user (see Figure 55 on page 54).



The screenshot shows the IEMS 7 Web Mail Client interface. At the top, there is a navigation bar with the IMA logo on the left and links for Home, News, Updates, Support, and About Version 7 on the right. The main content area features a red message: "Thank you for using Web Mail Client. You have logged out successfully." Below this, there is a section titled "Login as another user." with input fields for "Username" and "Password", and a "Proceed" button. A list of instructions is provided: 1. Enter your e-mail address, (e.g. john@ima.com) in the User name input text box. 2. Enter your password (case sensitive). 3. Click the Proceed button to validate your user account. At the bottom, the copyright notice reads: "Copyright © 2003 International Messaging Associates".

Figure 55: IEMS Logout Page

CHAPTER 3

Distribution List Configuration

The Professional Enterprise (PE) edition of IEMS provides full distribution list support. Lists can be maintained by the system administrator or by any list member. List maintenance is accomplished by selecting *Distribution List Configuration* on the main IEMS home page.



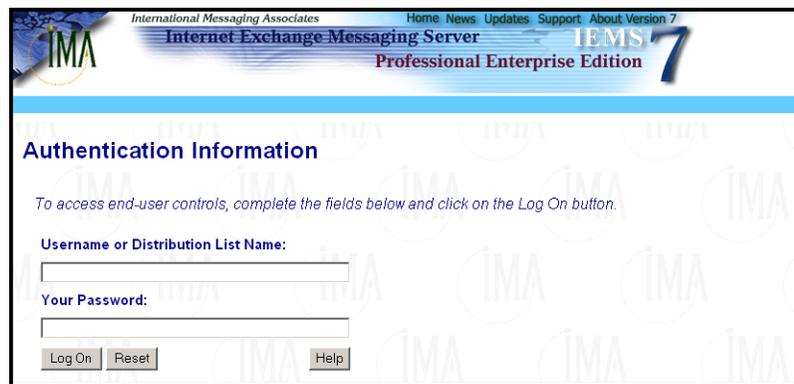
Figure 56: Main IEMS Home Page

System Login

Before any list maintenance can be accomplished, the list maintainer must login. The login page (see Figure 57 on page 56) is the first page displayed. The administrator must enter the distribution list name (*simpsons@jade.net* in our example), and the list maintenance password. After supplying the necessary information, click the **Log On** button to gain access.

Note: *Distribution lists are initially setup with the full email address of the list maintainer as the password. It is **strongly** recommended that this default password be changed at the earliest possible time after list creation to ensure proper list security.*

SYSTEM LOGIN



The screenshot shows the login interface for Internet Exchange Messaging Server (IEMS) 7 Professional Enterprise Edition. At the top, there is a navigation bar with the IMA logo on the left and links for Home, News, Updates, Support, and About Version 7 on the right. The main title is "Internet Exchange Messaging Server Professional Enterprise Edition IEMS 7". Below this is a section titled "Authentication Information" with a sub-header "Authentication Information". A note reads: "To access end-user controls, complete the fields below and click on the Log On button." There are two input fields: "Username or Distribution List Name:" and "Your Password:". Below the password field are three buttons: "Log On", "Reset", and "Help".

Figure 57: Distribution List Configuration Login

After successful login, the main *Distribution List Controls* page will be displayed (see Figure 58 on page 56).



The screenshot shows the "Distribution List Controls" page. At the top, there is a navigation bar with the IMA logo on the left and links for Home, News, Updates, Support, and About Version 7 on the right. The main title is "Internet Exchange Messaging Server Professional Enterprise Edition IEMS 7". Below this is a section titled "Distribution Lists" with a sub-header "Distribution Lists". A list of links is provided: "Configure Mailing List", "Modify Spam filter settings", "Edit Subscriber List", "Descriptive Information", "Update Password", and "Logout". In the center of the page, there is a large box with the text "Distribution List Manager".

Figure 58: Distribution List Controls

CONFIGURE MAILING LIST

Configure Mailing List

The list owner or system administrator may modify an existing mailing list by clicking the **Configure Mailing List** button on the left menu frame.

The screenshot displays the 'Modify Mailing List Settings' page. The left sidebar contains a 'Distribution Lists' menu with options: 'Configure Mailing List', 'Modify Spam filter settings', 'Edit Subscriber List', 'Descriptive Information', 'Update Password', and 'Logout'. The main content area is titled 'Modify Mailing List Settings' and shows the list name 'buddies@jade.net' and 'Homer's Buddies'. The settings are as follows:

| General Attributes | |
|-------------------------------------|---|
| Enable Archiving | <input checked="" type="radio"/> Yes <input type="radio"/> No |
| When receiving Invalid Posting | Bounce to the original sender |
| Mailing List Control | |
| Allow posting from non list member? | <input checked="" type="radio"/> Yes <input type="radio"/> No |
| Enable Auto Subscription? | <input checked="" type="radio"/> Yes <input type="radio"/> No |
| Default Posting Permission | <input checked="" type="radio"/> Allow <input type="radio"/> Block |
| Remove Return-Receipt-To Header? | <input checked="" type="radio"/> Yes <input type="radio"/> No |
| Message Digest | |
| Use MIME Digest | <input checked="" type="radio"/> Yes <input type="radio"/> No |
| Maximum Message Digest Size: | 0 KB |
| Digest Generation Time at | 00:00 |
| | <input checked="" type="radio"/> Daily <input type="radio"/> Weekly <input type="radio"/> Monthly |
| | On: Monday Day of the Month |

At the bottom of the form are 'Update' and 'Help' buttons.

Figure 59: Modify Mailing List Settings

This displays the “Modify Mailing List Settings” (see Figure 59 on page 57) for updating and editing the mailing list’s attributes. List maintainers may edit any of the following fields:

Enable Archiving

Selecting **Yes** will save messages in the archive folder under the DLMgr sub-directory. Messages will not be saved in the archive folder under the DLMgr sub-directory if the option is set to **No**. The default is **Yes**.

When receiving invalid posting

Choose from the pull-down menu the action to be taken - bounce to the original sender, forward to the list owner, bounce and forward, or discard when there is an invalid posting to the list. The default is bounce to the original sender.

Bounce to the Original Sender

Will bounce back the message to the original sender when there is an invalid posting to the list. **Forward to the list owner** will pass the message to the list owner of the particular mailing list. **Bounce and Forward** will bounce back the message to the original sender and at the same time forward the message to the list owner of the particular mailing list. The **Discard** option will delete the message.

CONFIGURE MAILING LIST**Allow posting from non-list member?**

Selecting **Yes** will allow posting from non-list members. Selecting **No** will restrict posting to list members only. The default is **Yes**.

Enable Auto Subscription

When the Distribution List Manager receives a subscription request, it first checks the **Enable Auto Subscription** attribute of the list the sender is trying to subscribe to. If set to **Yes**, the Distribution List Manager activates automatic subscription. A confirmation message is then sent to the prospective subscriber informing him that he must reply to the confirmation message with the word "OK" before he is successfully added to the mailing list. If set to **No**, the Distribution List Manager passes the subscription request to the list owner. The list owner will then decide if he will add the potential subscriber to the list or not. The default is **Yes**.

Default Posting Permission

Set the posting permission either to Allow or Block all postings to list. The default is Allow. The **Allow** permission allows the list member to post messages to the list. The **Block** permission prohibits the list member to post messages to the list to which he is a member.

Remove the Return-Receipt-To Header

Messages that are sent through a distribution list may have a return receipt or delivery notification request attached. If these go through the distribution list and make it to the subscribers of the list, return notifications may be sent back to the original sender. If the list is closed, or if the identities of the subscribers are sensitive or confidential, then allowing these requests through to the subscribers of a distribution list creates a security risk.

Set the header option either Yes or No. The default is Yes. Setting this value to **Yes** will remove all Return Receipt and/or DSN requests before they reach the list subscribers.

Use MIME Digest

Distribution lists that generate digests (a collection of list messages compiled into a single message) have the option of using MIME or non-MIME digest formats. MIME-formatted digests attach each submitted message as a separate message type attachment, while non-MIME digests append the content of each message as plain text in the digest.

For lists where either the recipients are using older non-MIME compliant readers, or if the nature of the list is entirely text-based, non-MIME digests can be used. For all other applications, especially where structured messages, including HTML and other rich text formats are used, or if attachments are common, the MIME digest type is recommended.

Set the MIME digest either Yes or No. The default is **Yes**.

Maximum Message Digest Size

The maximum size of the message digest. The default is 0, which means no limit. If the message digest size is given a value other than zero and it exceeds the limit, the message will be divided into several smaller messages.

EDIT SUBSCRIBER LIST

Digest Generation at

Set the digest generation options "Daily, Weekly, and Monthly" to generate digest message. The system administrator can also specify the day, hour, and minute when the message digest shall be generated.

Click the **Update** button to save the modifications made.

The list owner or system administrator may add or delete subscribers from a list by clicking the Edit Subscriber List button on the left menu frame. This action displays the "List of Subscribers" screen (see Figure 61 on page 61).

**Edit
Subscriber
List**

To add subscriber(s), type the email address of the subscriber(s) in the **Subscribers to Add** field. Select a delivery method by marking the **Immediate** or **Digest** radio button.

In immediate mode, when messages are posted to a mailing list, the Distribution List Manager sends them immediately to the mailing list's subscribers. The immediate mode is the default setting. If a subscriber wants his account to be in the digest mode, he must send a request to the list owner or system administrator. In the digest mode, posted messages are allowed to accumulate in the local archive of the member(s) who selected this mode and are sent to the subscriber based on a predetermined schedule set by the list owner or system administrator as requested by the subscriber. The delivery schedule is based on several parameters configured by the list owner or system administrator, such as the day and time of delivery and the maximum number of messages that can be stored as configured in the archive.

The list owner or system administrator may delete members from mailing lists to their subscription. The members who are removed will not be able to receive message postings from the other members of the mailing list. To delete subscribers, select the email address of the subscribers in the **Subscribers to Delete** field and click the **Submit** button.

EDIT SUBSCRIBER LIST

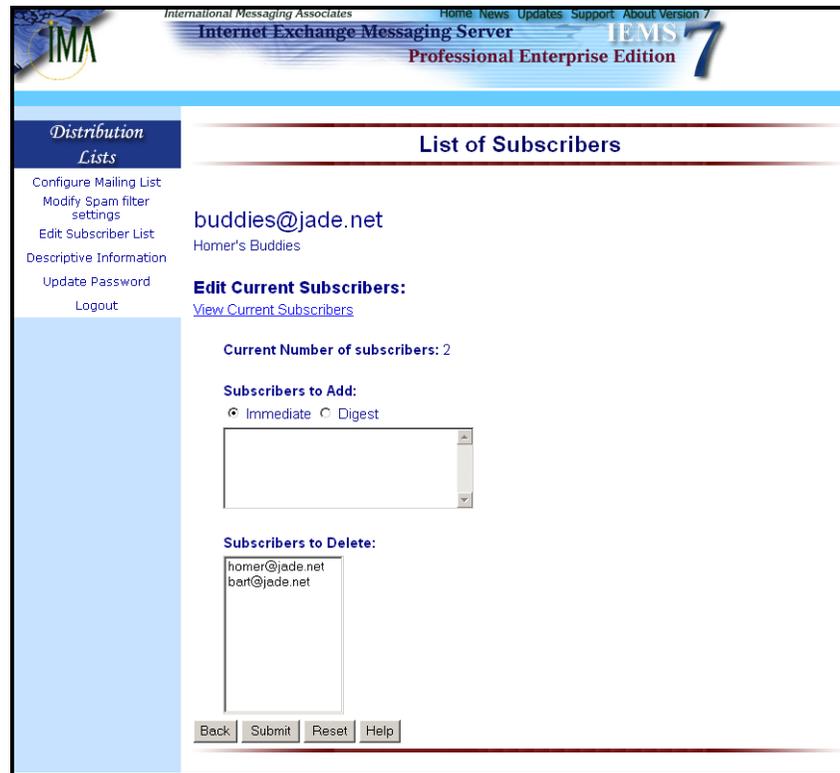


Figure 60: Adding or Deleting Subscribers

Note: Multiple deletion of members is allowed. To delete multiple members, enter the email address to be deleted separated by a comma, semicolon, or space after each mailing addresses.

Viewing Current Subscribers

To view the list of current subscribers, click the **View Current Subscribers** link on the “List of Subscribers” screen (see Figure 61 on page 61). This action displays the list of current subscribers. Links that corresponds to the posting permission of the user are given on this page. The list owner or system administrator may either block or unblock the settings of the subscriber(s). Clicking the **Block** link beside the **Delivery Mode** column marks the subscriber as blocked. This means that the subscriber is not allowed to post messages to the list. Clicking the **Unblock** link removes the blocked setting of the subscriber. This means the subscriber is allowed to post messages to the list.

Each mailing list address is linked to the “Mailing List Member” screen. Click the mailing list address under the **Subscriber** column to edit the profile (email address and delivery mode) of the subscriber.

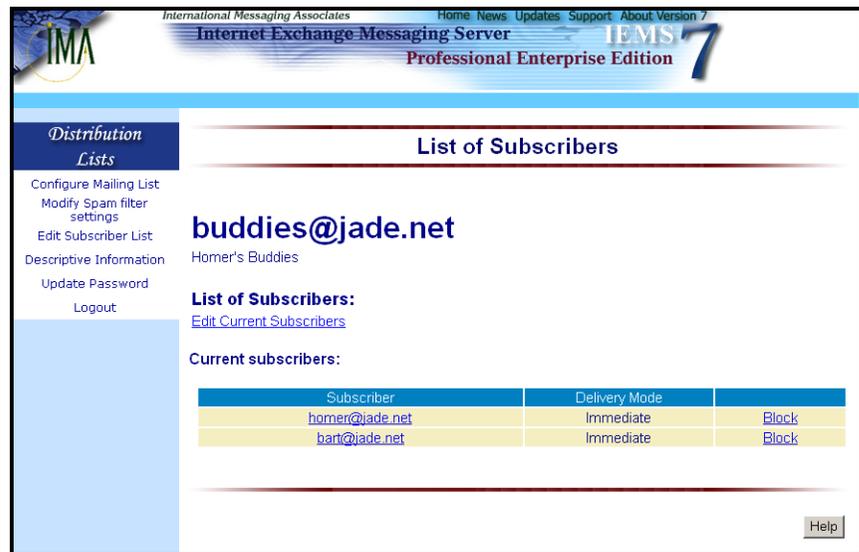


Figure 61: Viewing Subscribers

Spam Filter Configuration

For systems with MTA Pass-Through enabled, distribution lists can also utilize this information on a list by list basis. All spam pass-through controls made available to local mail users, with the exception of auto-filing to pre-defined folders, is supported for distribution lists.

To configure the spam settings for the current distribution list, click on the **Modify Spam filter settings** button in the main menu area. The *Spam Filter Configurations* screen will be displayed (see Figure 62).

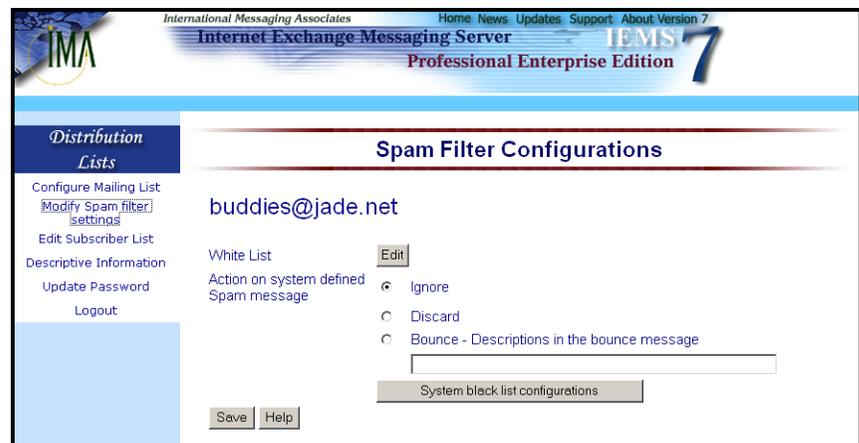


Figure 62: Spam Filter Configurations

The screen is laid out in two sections - DL whitelists and MTA Pass-Through handling.

SPAM FILTER CONFIGURATION

DL Whitelists

There can be times where it is not desirable to apply spam filtering to messages. Examples include messages from friends, family, and close business associates. Messages from trusted sources such as these are usually desirable regardless of content. IEMS allows for the configuration of DL whitelists, containing the email addresses of trusted senders where normal anti-spam filtering should not be applied. To configure DL whitelists, click on the **Edit** button next to the *White List* tag on the top of the screen. The following screen will be displayed:

Figure 63: DL White List Configuration

The White List Configuration is presented in two sections - *Sender Email Address Configuration*, and *Sender IP Address Configuration*. Both can be used and configured independently of the other.

To add the sender email address to the list of allowed senders, type the address under the *Add this address to whitelist* entry and then click the **Add** button. If you want to specify a domain, you can use the wildcard "*" character when entering the address. For example:

**@company.com*

will white list all sender from the domain *company.com*.

To remove a sender, select the address from the address list and click the **Remove** button.

To add the sender IP (network) address, type the IP address under the *Add this IP address to whitelist* entry and then click the **Add** button. If you want to specify a range of IP address, you can use dash "-" character. For example:

SPAM FILTER CONFIGURATION

192.168.0.0-192.168.0.255

will white list all IP address from 192.168.0.0 to 192.168.0.255.

To remove a sender IP, select the IP address from the address list and click the **Remove** button.

MTA Pass-Through Handling

Spam detection procedures that are applied within the MTA can optionally have action deferred until such time as an agent for the user (Distribution List Manager) has control of the message. These MTA Pass-Through actions are defined in the second section of the Spam Filter configuration page. This section is identified by the label *Action on system defined Spam message* (See Figure 64).

Figure 64: DL MTA Pass-Through Configuration

A message can be marked as Spam by the Internet Exchange Message Server SpamAssassin plugin module, or reported by the DNS-BL lookups at SMTP connection time. When such a spam tagged message is received, you can configure the list profile to perform one of the following actions:

Ignore - Ignore the spam message and continue normal delivery.

Discard - Discard the message such that your mailing list member will not receive this message.

Bounce - Bounce the message back to the sender.

When bouncing a message, the text of the message sent back to the sender can be configured in the box below the **Bounce** selection.

When there is one or more DNS-BL host defined in the system, the **System black list configurations** button will be displayed. Click this button to configure specific actions to perform on a per DNS-BL tagged message basis (see Figure 65). In this page, you can define action against spam message marked by certain DNS-BL host.

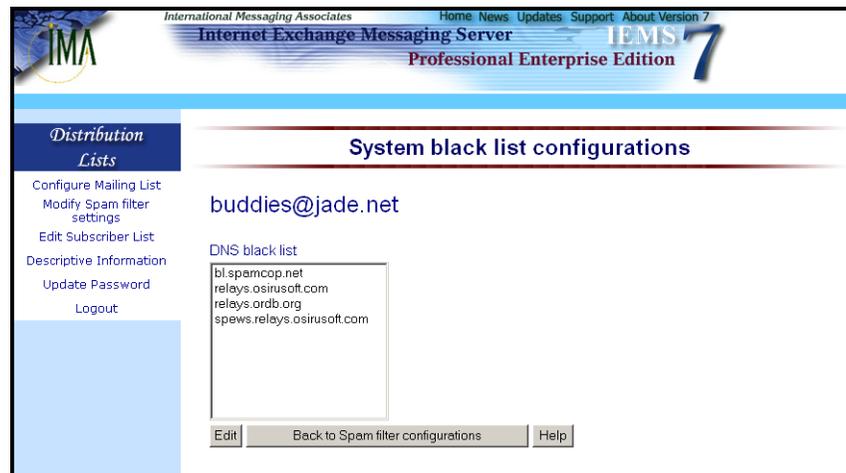


Figure 65: DL DNS Black List Configuration

When there is one or more DNS-BL host defined in the system, this configuration page will be available. You can perform different actions against each DNS-BL host in your server to refine your spam filter behavior. To configure, first select a DNS-BL host name and then click the **Edit** button. For each DNS-BL host, you can select one of the following actions:

Ignore - Ignore the spam message and continue normal delivery.

Discard - Discard the message such that your mailing list member will not receive this message.

Bounce - Bounce the message back to the sender.

When bouncing a message, the text of the message sent back to the sender can be configured in the box below the **Bounce** selection.

DESCRIPTIVE INFORMATION

Descriptive Information

The list owner or system administrator is allowed to provide a short or long description of the mailing list by clicking the **Descriptive Information** button on the left menu frame. The “Descriptive Information” screen (see Figure 66 on page 65) appears. The system administrator may also create a welcome or farewell message for the mailing list members. The welcome message is sent to those members who were automatically added via automatic subscriptions. The farewell message is sent to those members who were removed from the mailing list via automatic unsubscriptions.

The screenshot shows the 'Descriptive Information' configuration page for the mailing list 'buddies@jade.net'. The page is part of the Internet Exchange Messaging Server (IEMS 7) Professional Enterprise Edition interface. The left sidebar contains a 'Distribution Lists' menu with options: 'Configure Mailing List', 'Modify Spam filter settings', 'Edit Subscriber List', 'Descriptive Information' (highlighted), 'Update Password', and 'Logout'. The main content area is titled 'Descriptive Information' and displays the following fields:

- Short Description:** A text input field containing 'Homer's Buddies'.
- Long Description:** A large text area with a vertical scrollbar.
- Welcome Message:** A text area with a vertical scrollbar.
- Farewell Message:** A text area with a vertical scrollbar.

At the bottom of the form are three buttons: 'Save', 'Reset', and 'Help'.

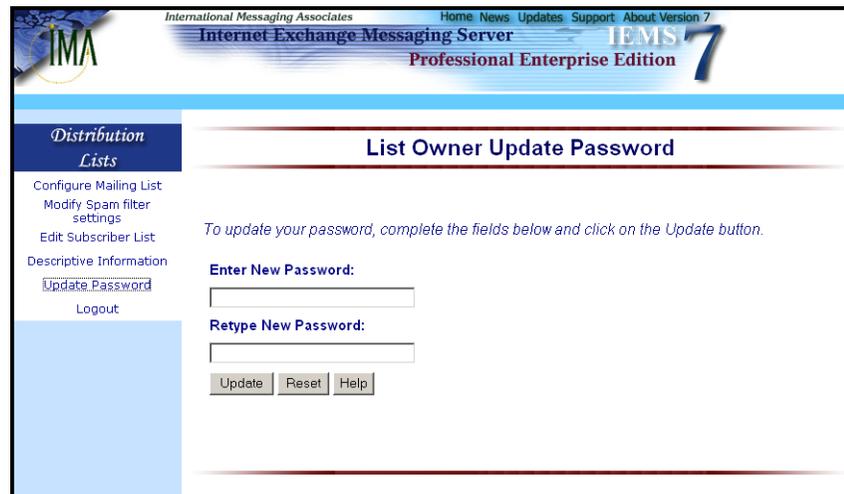
Figure 66: Creating Descriptive Information

UPDATE PASSWORD

Update Password

The Distribution list owners and system administrators may update their password to secure the mailing list settings.

To update the list owner's password, click the **Update Password** button on the left menu frame. The "Update Password" screen (see Figure 67 on page 66) appears. Indicate the new password in the **New Password** and **Confirm Password** fields. Click the Update button to save the new list owner password.



The screenshot displays the IEMS 7 Professional Enterprise Edition web interface. At the top, there is a navigation bar with links for Home, News, Updates, Support, and About Version 7. The main header includes the IMA logo and the text 'Internet Exchange Messaging Server IEMS 7 Professional Enterprise Edition'. On the left, a navigation menu is visible with categories like 'Distribution Lists' and 'Descriptive Information'. The 'Update Password' link is highlighted. The main content area is titled 'List Owner Update Password' and contains a form with two input fields: 'Enter New Password:' and 'Retype New Password:'. Below the fields are three buttons: 'Update', 'Reset', and 'Help'. A message above the fields reads: 'To update your password, complete the fields below and click on the Update button.'

Figure 67: Updating list owner password

CHAPTER 4

Distribution List Subscription

The Professional Enterprise (PE) edition of IEMS provides full distribution list support. Lists can be subscribed to by either users of the local system, or remote users. Remote (non-local) users can manage distribution list subscriptions by selecting the *Distribution List Subscription* on the main IEMS home page.



Figure 68: Main IEMS Home Page

Open Mailing Lists

Upon selecting the *Distribution List Subscription* button on the main IEMS page, you will be presented with a list of currently open mailing lists on the system (see Figure 69 on page 68). Each entry includes the email address of the list, and its short description.

Mailing List Subscription

To subscribe to a new list, or to maintain an existing subscription, simply click on the email address of the desired list. This will bring up the “Mailing List Subscription Form” (see Figure 70 on page 68).

Subscribing

If you are trying to subscribe to a new list, click the desired delivery mode (*Immediate* or *Digest*), and enter your email address in the supplied field. Then click on the **Submit** button to enter your subscription request.

MAILING LIST SUBSCRIPTION

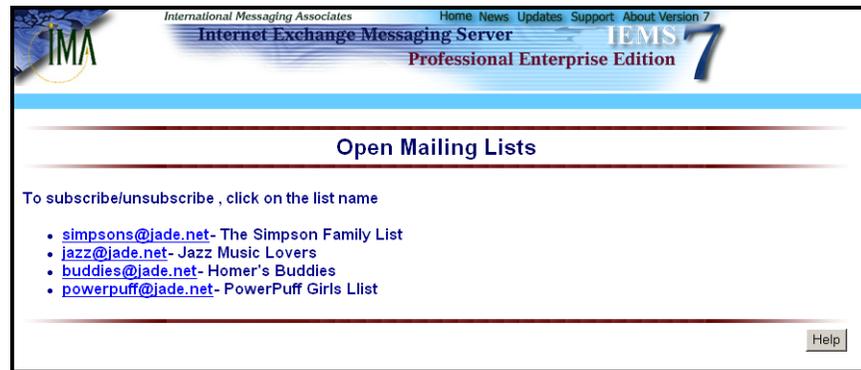


Figure 69: Open Mailing Lists

Unsubscribing

If you are trying to unsubscribe from the list, simply enter your email address in *Your E-mail address* field, and click on the **Submit** button to enter your request.

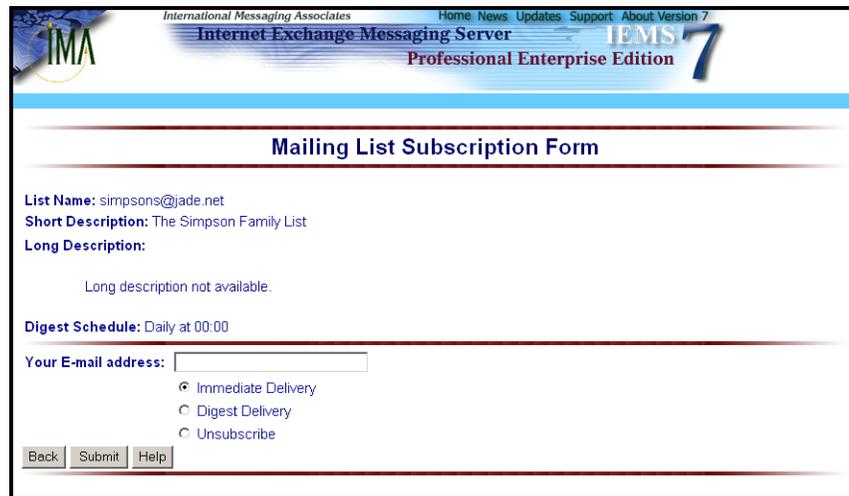


Figure 70: Mailing List Subscription Form

Request Confirmation

The Distribution List Manager will be notified of either your subscription or unsubscription request, and a confirmation message will be sent to the address specified. To confirm the requested action, simply reply to the confirmation message with "OK" as the message text.

CHAPTER 5

Distribution List Archives

Distribution List Archives (available under the Professional Enterprise (PE) edition of IEMS) allow users to view previous messages posted to IEMS mailing lists. Messages may be sorted by date, subject or author. The archives permit list members and non-members to access the archives of open subscription lists, and allows closed subscription list members to access the archives of these lists.

Note: *Only archived messages with Enable Archiving attribute that is set to Yes as defined by the list owner or system administrator are displayed in the “Distribution List Archives” screen.*

To access the Distribution List Archives, go to the main interface of IEMS and click the **Distribution List Archives** button. This action displays the “Distribution List Archives” screen (see Figure 71 on page 69). Select and highlight a mailing list from the drop-down list and click the **Submit** button.

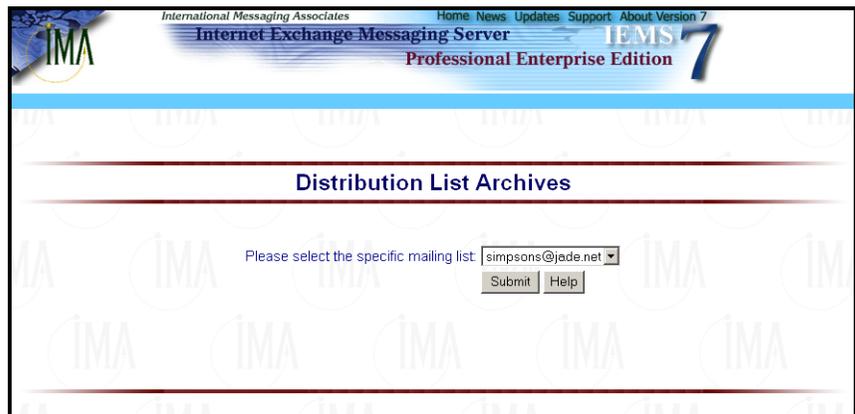


Figure 71: Distribution List Archive page

After selecting a specific mailing list archive (e.g. *mailinglist1@ima.com*), the Distribution List Manager displays the main page of the archived message if the selected list is an open subscription list (see Figure 72 on page 70). The screen provides links to the different index pages.

Note: *If the selected mailing list is a closed subscription list, the login screen appears (see Figure 77 on page 73).*

VIEWING MESSAGES SORTED BY DATE

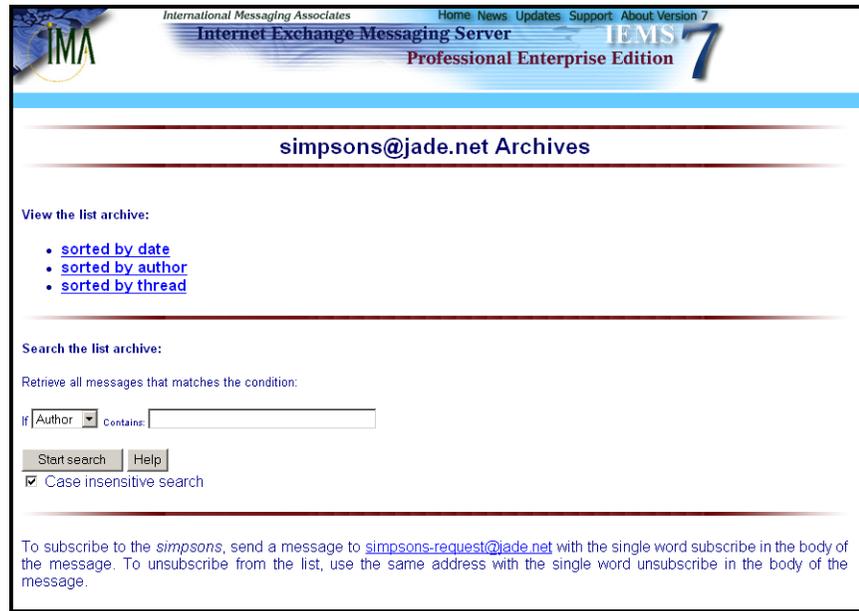


Figure 72: Mailing List Archive

Viewing Messages Sorted by Date

To display messages sorted by date, click the **Sort by date** link (see Figure 72 on page 70). The “Archive by Date” screen (see Figure 73 on page 70) appears displaying the messages in the selected archive arranged by date received.

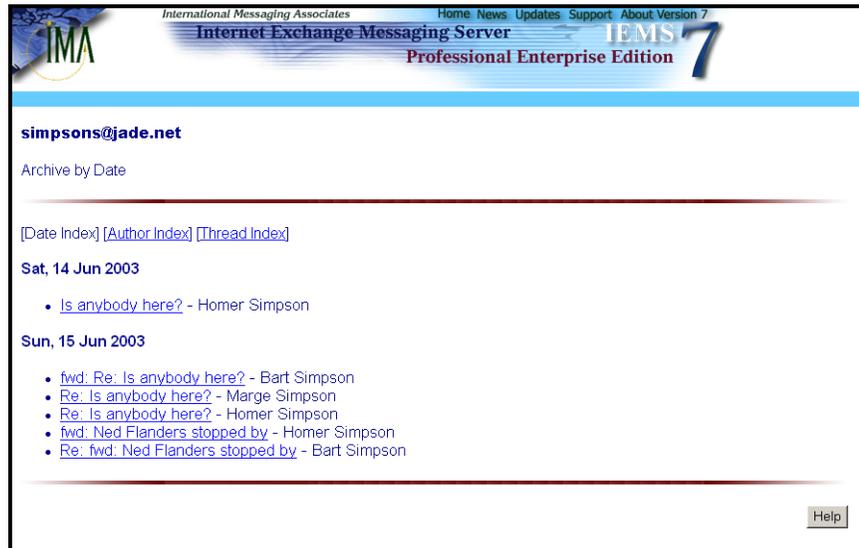


Figure 73: Sorting by date

VIEWING MESSAGES SORTED BY THREAD

Viewing Messages Sorted by Thread

To display messages sorted by thread, click the **Sort by Thread** link (see Figure 72 on page 70). The “Archive by Thread” screen shows the messages in the archive arranged according to subject thread. (see Figure 74 on page 71).



Figure 74: Sorting by Thread

Viewing Messages Sorted by Author

To display messages sorted by author, click the **Sort by Author** link (see Figure 72 on page 70). The “Archive by Author” screen appears displaying the archived messages sorted by author (see Figure 75 on page 71).



Figure 75: Sorted by Author

SEARCHING FOR AN ARCHIVED MESSAGE

Searching for an Archived Message

Functions are available to search for messages according to any of the following criteria: Author, Subject, and Date. On the selected mailing list's (e.g. mailinglist1@ima.com) screen, at the "search the list archive" block (see Figure 72 on page 70), select a search criteria (i.e., author, subject and date) from the drop-down list.

In the **Contains** text box, enter a word, phrase or email address that the Distribution List Manager must search for in the selected header.

Archived Message

If users wish the comparison of the header field and pattern be case insensitive, mark the check box beside Case insensitive, otherwise leave it unmarked. To initiate search, click the Start Search button.

Archived messages can be viewed by clicking the subject link. The screen displays three links, namely: Date Index, Author Index and Thread Index. Clicking any of the links displays the appropriate page. The following header information will also appear:

To
Subject
From
Date

The message body is displayed after the header information.

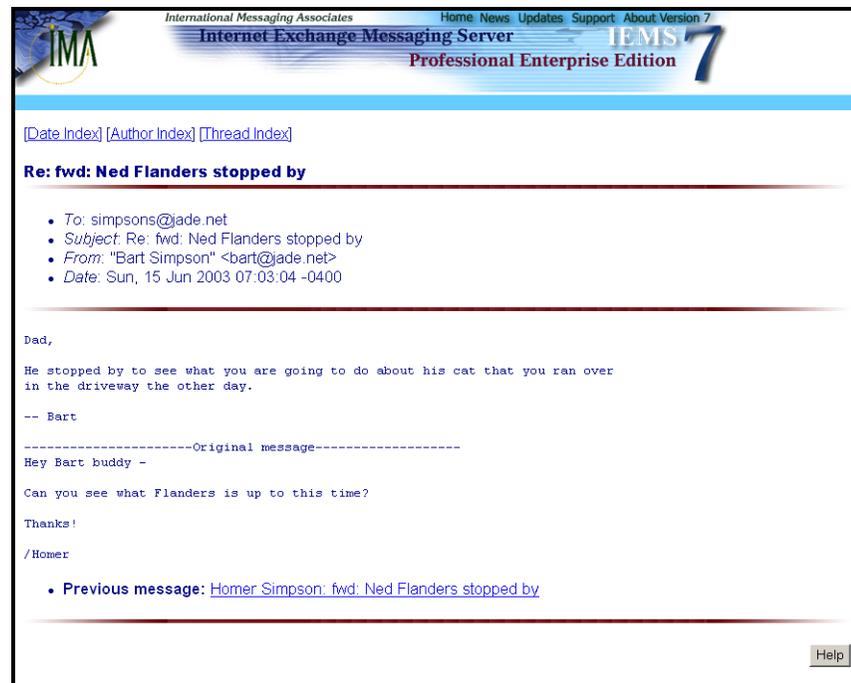


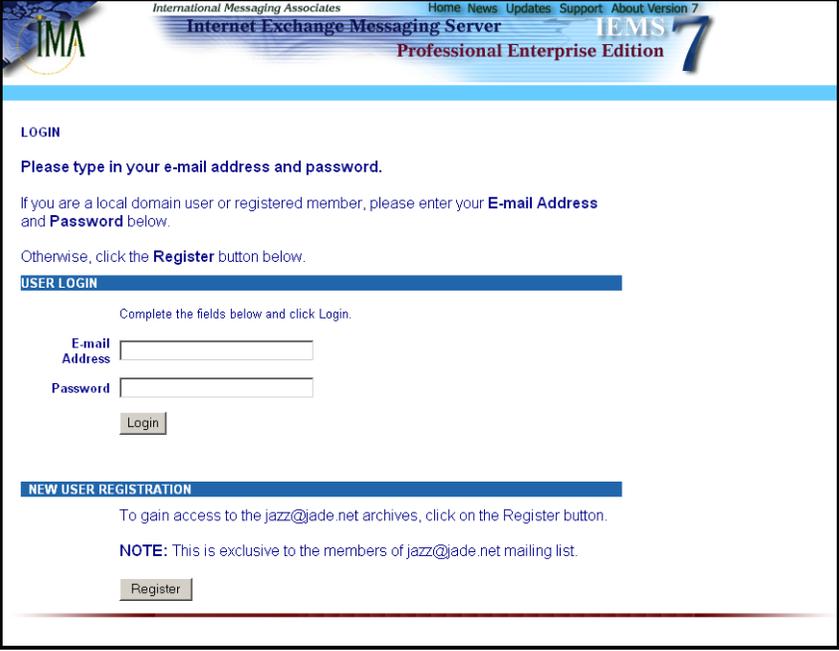
Figure 76: Viewing an archived message

USER LOGIN

User Login

Access to the archive of a closed subscription mode list is exclusive to its members. Thus, it is necessary for the Distribution List Archive to verify if the user is a member of the closed list. To view the archive of a closed subscription list, the user will be asked to enter his email address and password on the “Login” screen (see Figure 77 on page 73). The Distribution List Archive will check if the email address entered is truly a member of the list. Once verified, the Distribution List Archive will determine if the user is defined in the Directory Services or not. If the user is defined, the Distribution List Archives displays the archive of a closed mailing list. If the user is not defined, this implies that the user is a remote user. All remote users must undergo registration before the authentication procedure.

The Distribution List Archive handles remote users by verifying if the remote user is a member of the mailing list. Once verified, the Distribution List Archive will check if the user is registered to view the mailing list archive. If the email address and password matches an entry from the remote.txt file, the Distribution List Archive will display the archive of the mailing list. Otherwise, an error will appear.



The screenshot shows the user interface for the Internet Exchange Messaging Server (IEMS) 7 Professional Enterprise Edition. At the top, there is a navigation bar with links for Home, News, Updates, Support, and About Version 7. The IMA logo is on the left, and the IEMS 7 logo is on the right. Below the navigation bar, the page is titled "LOGIN" and contains the following text:

Please type in your e-mail address and password.

If you are a local domain user or registered member, please enter your **E-mail Address** and **Password** below.

Otherwise, click the **Register** button below.

USER LOGIN

Complete the fields below and click Login.

E-mail Address

Password

Login

NEW USER REGISTRATION

To gain access to the jazz@jade.net archives, click on the Register button.

NOTE: This is exclusive to the members of jazz@jade.net mailing list.

Register

Figure 77: Authentication/Registration page

USER REGISTRATION

User Registration

For remote users to gain access to the archive, they must first register. To register, click the Register button on the “Login” screen. This displays the registration form where the user must enter his email address and password. This process will verify if the email address entered is truly a member of the list. To verify the authenticity of the request, the Distribution List Archive will generate an email, which will be sent to the “request” account of the mailing list. A sample message can be found below:

```
To: outdoors-request@mactan.ima.com
From: kurt@mactan.ima.com
Subject:
```

```
-----
Archive Registration (xxxxxxx)
User: kurt@mactan.ima.com
Password: password
```

Where:

User is the email address of the member
Password is the password of the member

Archive Registration will randomly contain numbers generated by the Distribution List Archive. This is important because the Distribution List Manager engine will only process archive registration messages that contain these numbers. This ensures that all the archive registrations will be done on the web, while manually created messages are to be ignored by the Distribution List Manager engine.

Upon receiving this request, the Distribution List engine will have to get the email address and password to verify the authenticity of the message by creating a reply email just like the subscription request. If the user replies to the confirmation email sent by the engine then, the engine itself will add the username and password to the **remote.txt** file. The file will be stored under the Archive folder of the mailing list's home directory, and will contain the email addresses of all the users subscribed to the mailing list and corresponding password. The password will be hashed before it is stored in the said file. The contents of the file will be:

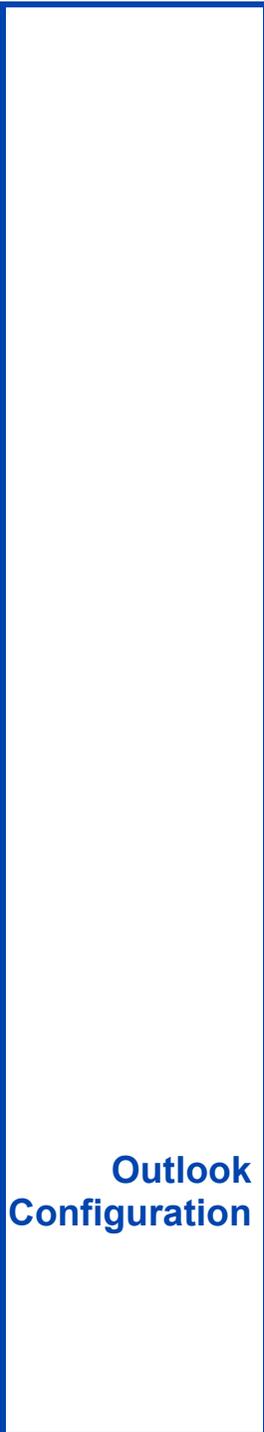
```
User1@ima.com; password
User2@ima.com; password
Usern@ima.com; password
```

Changing the Password for Remote Members

Registered members of a closed mailing list may change or update their archive password by clicking the **Change Password** button on the “Distribution List Archives” screen. This command displays the “Change Password” screen. To change the password, type new password, and click the **Update** button to save the new password.

APPENDIX A

Introduction to Outlook 98/ 2000 Free/Busy Features



**Outlook
Configuration**

The Professional Enterprise Edition of IEMS 7 provides backend server support for the Microsoft Outlook 98 / 2000 calendaring and scheduling features. In particular, IEMS 7 provides a public file server for the publishing of Internet Free/Busy (IFB) information. Outlook users can share calendaring information between themselves, and schedule meetings via Internet email.

Microsoft Outlook Internet Free / Busy Feature

The Internet Free/Busy (IFO) feature of Outlook 98 / 2000 (Internet Mail Only mode) allows users to see when others are free or busy in order to efficiently schedule meetings. Users publish their busy/free information to an IEMS shared file server. Each user's schedule information is published at a unique URL specific to the individual. Users can then share the information at this location with all users, or any specific users determined by each user. Access to busy/free information is controlled through the configuration information supplied by each user to the IEMS file server.

IEMS 7 Free/Busy Server

Individual Free/Busy information is published from Outlook to an IEMS Free/Busy Server. This server is implemented as a specialized FTP server residing on the IEMS host. All access to information on the IEMS server must be authenticated by providing login information (done through the individual Outlook configurations). This login information is authenticated against account information stored in the IEMS Directory. Once authenticated, users can update their schedules, or access other's schedules, provided they have appropriate access rights.

Users control access rights to their free/busy schedules through the IEMS 6 Web Mail Client. Using this simple interface, users can easily create and maintain access control lists of users permitted to view the free/busy schedule information.

To use the Calendaring and Scheduling capabilities of the Outlook clients, both the Outlook client as well as the IEMS Free/Busy server need to be configured. To configure Outlook, the Free/Busy options need to be properly setup. To do this, first bring up the Options screen by selecting Tools and then Options from the menu bar (see Figure 78 on page 76).

OUTLOOK CONFIGURATION

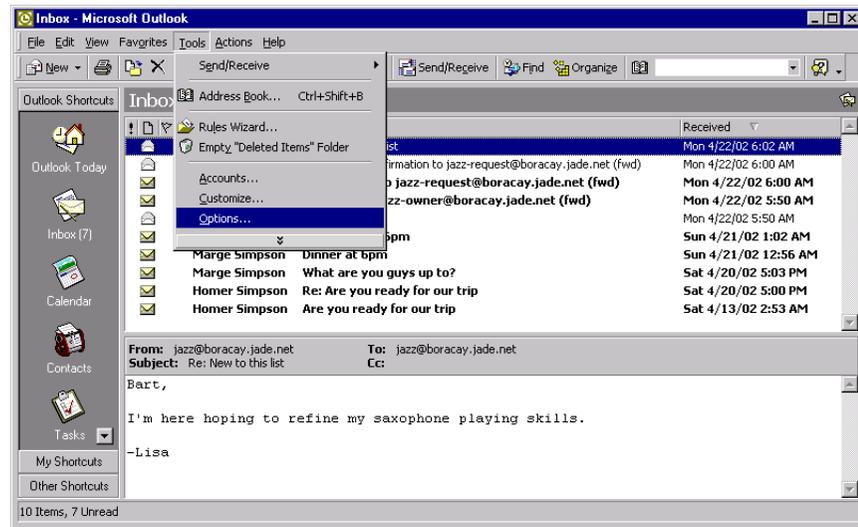


Figure 78: Outlook 98/2000 Options (1)

This will bring up the Options screen:

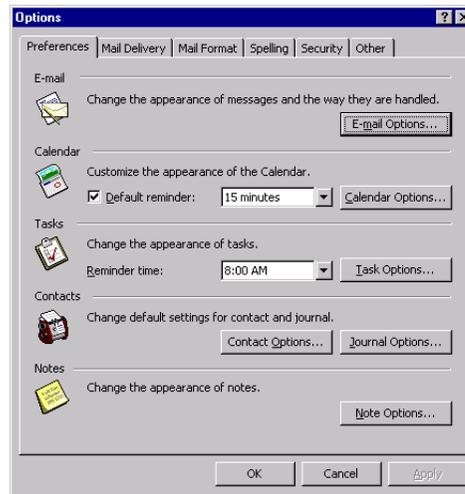


Figure 79: Outlook 98/2000 Options (2)

Selecting **Calendar Options** brings up the *Calendar Options* screen:

OUTLOOK CONFIGURATION

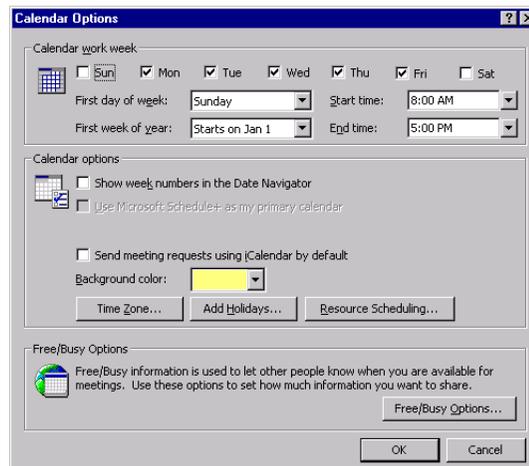


Figure 80: Calendar Options

Selecting **Free/Busy Options** brings up the final desired screen:

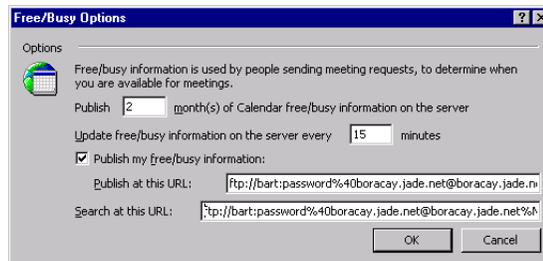


Figure 81: Outlook 98/2000 Free/Busy Options

This screen is used to configure where Outlook stores the personal free/busy schedule (*Publish at this URL* field), as well as where to look for the free/busy schedule of other users (*Search at this URL* field). Free/Busy schedules for all users are stored in the backend FTP server in Vcalendar format. IEMS also stores individual Access Control Lists for each user in the backend, which is used by the server to control / limit access to each individual free/busy schedule.

OUTLOOK CONFIGURATION

Free/Busy Option Configuration

Three fields need to be specified on the Free/Busy Options screen - *Publish my free/busy information*, *Publish at this URL*, and *Search at this URL*.

Publish my free/busy information

This checkbox must be selected. This tells Outlook to go ahead and publish your free/busy schedule at the URL specified in the *Publish at this URL* field.

Publish at this URL

This is the URL where Outlook will store your individual free/busy schedule information. The format of this URL is:

```
ftp://username1:password@servername/username2.vfb
```

Where:

- username1:** your complete email address with the '@' character replaced by "%40".
- password:** your login password
- servername:** The Fully Qualified Domain Name (FQDN) of the IEMS server.
- username2:** like username1, but without the substitution of the '@' character - the real email address.

For our example user, Bart Simpson, who has a password of "password", and whose IEMS server is *boracay.jade.net*, the appropriate entry is:

```
ftp://bart%40boracay.jade.net:password@boracay.jade.net/bart@boracay.jade.net.vfb
```

but all on one line.

Search at this URL

This is the URL where Outlook will search for other people's free/busy schedule information. The format of this entry is:

```
ftp://username1:password@servername/%NAME%@%SERVER%.vfb
```

Where the field definitions are the same as the previous section. For our friend Bart Simpson, his entry would be:

```
ftp://bart%40boracay.jade.net:password@boracay.jade.net/  
%NAME%@%SERVER%.vfb
```

The %NAME% and %SERVER% fields will hold the real name and server information for the requested schedule at the the time Outlook makes a query.

After entering all the necessary information, click on the **OK** button to continue.

OUTLOOK CONFIGURATION**Access Control Configuration**

In order for remote users to access your published free/busy schedule, you need to grant them the necessary permission. This is done through access control lists. For more information on how to maintain individual access control lists, please see "IEMS Free/Busy Server" on page 49.

INDEX

Numerics

3-User 7

A

A Plan For Spam 27
Access Control Configuration 79
Access Control Lists 77
access controls 49
Address Book 16
Address Book Entries 35
Address Books 33
Address Configuration 29
Archive by Author 71
Archive by Date 70
Archive by Thread 71
Archive Registration 74
Archived Message 72
Archiving 57
Attach File 16
Attachment 12
Auto Subscription 58
Available Mailing Lists 50

B

Bayesian Filter 26, 27, 31, 32
Bayesian Filter Learning Engine 27
Bayesian Filtering 25
Bayesian filtering 27
bayesianlearn 27, 28
Better Bayesian Filtering 27
blacklists 25
Bookmarks 40
Bounce to Original Sender 57
Browse 17

C

Calendar Options 76
calendar and scheduling 75
Category 41
Change Password 74
Compose 16
Composing Messages 38
Configure Mailing List 57
Confirmation 68
Confirmation Messages 51
Content Filters 26
Copy To 17
Copying 17
Create New Folder 18
Current Subscribers 60

D

Default Posting Permission 58
Delete 15, 17, 19
Deleting Existing Address Book Entries 35
Deleting Filter Rules 46
Delivery Mode 60
Descriptive Information 65
Digest Generation 59
digest mode 59
Digest Size 58
Distribution 55, 67
Distribution List 7
Distribution List Archives 69
Distribution List Configuration 55
Distribution List Controls 56
Distribution List Manager 69
Distribution List Subscription 67
Distribution Lists 26, 50, 55, 67
DL Whitelists 62
DL whitelists 61
DNS-BL 23, 25, 26, 31, 64
DSN requests 58

E

Edit Subscriber List 59
Editing Existing Address Book Entries 35
Editing Filter Rules 46
Enable Archiving 69

F

farewell message 65
File Attachments 16
file attachments 12
File Download 12
Filter Rules 43, 45
Find Message 20
Folder Deletion 23
Folder Renaming 23
FOLDERS 11, 18
Forward 13
Forwarded Message 14
Free/Busy 75
Free/Busy Option Configuration 78
Free/Busy Options 77
Free/Busy Server 49, 75

G

global address book 33
Global Directories 36

I

- IFO 48
- IMAP 9
- immediate mode 59
- Inbox 43
- INFO 10
- Internet Free/Busy 48, 75
- invalid posting 57
- IP address 62
- IP Address Configuration 29

L

- List of Lists 50
- list owner 66
- LMDA 26, 43, 44
- Local Mail Delivery Agent 26
- Local Services 26
- Login 54, 55
- Logout 54

M

- Mailing List Subscription 67
- Mailing List Summary 51
- Mailing Lists 50
- Mailsort 43
- Mailsort Filter Information 45
- Message Headers 20
- Message Source 21
- Message Storage 26
- Message Store 9, 43
- Microsoft Outlook 48, 75
- MIME Digest 58
- Modify Mailing List Settings 57
- Move To 18
- Moving 17
- MTA Pass-Through 23, 25, 29, 30, 61, 63
- Multiple deletion 60

N

- Netscape Communicator 9
- New Address Book Entries 34
- New Folder 18, 22

O

- Open Mailing Lists 67
- Outlook Express 9

P

- Pass-Through 24

- Password 40
- Password for Remote Members 74
- PE 7, 50, 55, 67, 69
- Pegasus 9
- Permitted Users 49
- Personal Address Book 34
- POP3 9
- Positioning Filter Rules 47
- private address book 33
- Professional Enterprise 7, 50, 69, 75
- Professional Enterprise Edition 48
- Profile 42
- Publish at this URL 77, 78

R

- Reading a Message 12
- Registration 74
- remote users 73
- remote.txt 74
- Rename 19
- Reply 14
- Reply All 14
- Return-Receipt-To Header 58

S

- Schedules 48
- SE 9
- Search at this URL 77, 78
- Searching 19
- Searching Local and Global Directories 36
- Send 14
- sent messages 10
- Show Message Header 20
- Show Message Source 21
- Signatures 39
- SMTP Authentication 25
- Sort by Author 71
- Sort by date 70
- Sort by Thread 71
- Spam Filter 28, 61
- Spam Filtering 23
- Standard Enterprise 50, 55
- Standard Enterprise 67
- Subscribe 51, 52
- System black list 30

T

- Telephone Number 42

U

Unsubscribe 51, 53, 68
Update Password 66
Upload 17
Uploading Files 23
URL 75
User Login 73
User Profile 42
User Registration 74
User Whitelists 29

V

Vacation Message 44, 47

vacation message 43
vacation utility 47
Vcalendar 77
View Current Subscribers 60

W

Web Folders 21
web folders 13
Web Mail Client 8, 9, 75
Web Mail Login 9
welcome message 65
White List 62
Whitelist 29