



# Probix Trustee

For Meetings

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## **DISCLAIMER**

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## **USING PROBIX TRUSTEE FOR MEETINGS**

Probix Trustee for Meetings is a service that enables you to make a document available to one or more people for a limited period of time. This service is extremely useful for preventing information from leaking out of your company and into the wrong hands.

To use Probix Trustee for Meetings:

1. Log Into the Probix Trustee for Meetings Server.
2. Enter the Sender Information.
3. Set Up a List of Recipients.
4. Attach Content.
5. Set Up Policy Options.
6. Send the Message.

This document explains how to accomplish these tasks.

## LOG INTO THE PROBIX TRUSTEE FOR MEETINGS SERVER

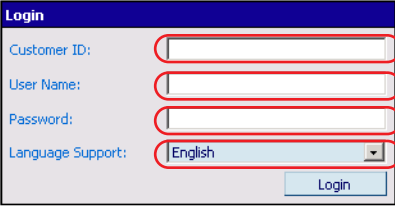
To connect to the Probix Trustee for Meetings server, enter the following URL into your browser:

`https://pt4m.probix.net`

**Note:** To run Probix Trustee for Meetings you must be running Microsoft Internet Explorer version 5.0 or higher.

Once you have connected you can log into the server.

When you connect to the Probix Trustee for Meetings server, the following prompt appears:



The screenshot shows a login form titled "Login" with the following fields: "Customer ID:", "User Name:", "Password:", and "Language Support:". The "Language Support:" field is a pull-down menu currently set to "English". A "Login" button is located at the bottom right of the form. Red lines connect the form fields to explanatory text on the right:

- Customer ID: Enter your company name here.
- User Name: Enter your username here (case-independent)
- Password: Enter your password here (case-sensitive).
- Language Support: Select language support option.

To log into the server, enter the following:

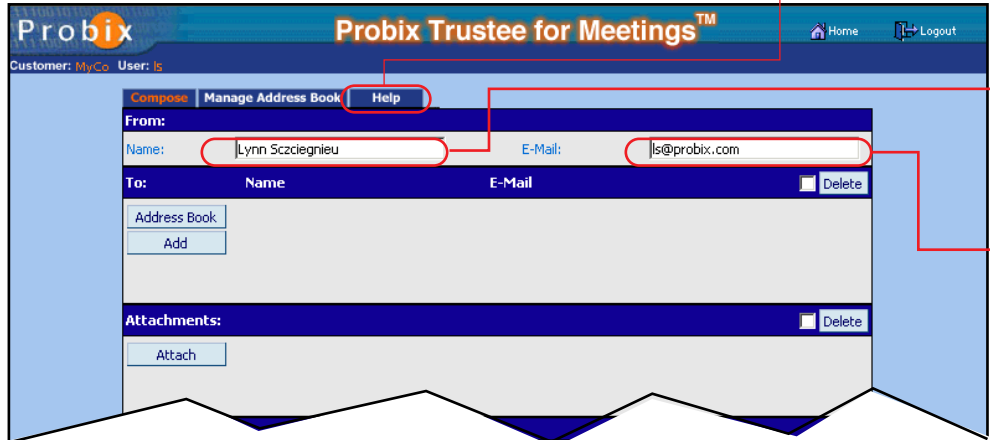
- Customer ID - The name of your company as registered with the Probix Trustee for Meetings server. Although this is case-independent, it will appear in whatever case it was entered into the Probix Trustee for Meetings server.
- User Name - Enter your user name. This is case-independent.
- Password - Enter your password. This is case-sensitive.
- Language Support - Use the pull-down menu to select English, Japanese (Shift-JIS), or Japanese (ISO-2022-JP).

If the information you have entered matches your Probix Trustee for Meetings user name and password on the server, you are logged into the Probix Trustee for Meetings server. If this information does not match the information on the server, you are prompted to re-enter this information.

Upon success, you enter the Probix Trustee for Meetings user interface.

## ENTER THE SENDER INFORMATION

Enter the name and e-mail address of the person sending the message. Note that the sender is automatically put on the Notification List.



The screenshot shows the 'Probix Trustee for Meetings' web interface. At the top, there is a navigation bar with the 'Probix' logo, the title 'Probix Trustee for Meetings™', and links for 'Home' and 'Logout'. Below this, a user status bar indicates 'Customer: MyCo' and 'User: ls'. The main content area features a 'Compose' tab, a 'Manage Address Book' button, and a 'Help' button. The 'From:' section contains two input fields: 'Name' with the value 'Lynn Szczegnieu' and 'E-Mail' with the value 'ls@probix.com'. Below these fields is a table with columns for 'Name' and 'E-Mail', and a 'Delete' button. There are also buttons for 'Address Book' and 'Add'. At the bottom, there is an 'Attachments:' section with an 'Attach' button and a 'Delete' button. Red callout lines point from the 'Help' button to the text 'Click to go to a tab for online help (this manual).', from the 'Name' field to 'Enter the name of the person sending the content here.', and from the 'E-Mail' field to 'Enter the e-mail address of the person sending the content here.'

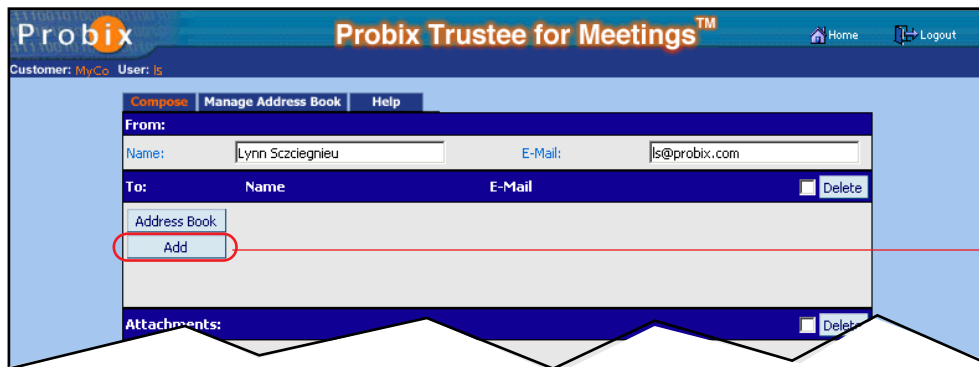
When you re-enter Probix Trustee for Meetings the name and e-mail address of the last person who accessed that page appear in these fields.

## SET UP A LIST OF RECIPIENTS

The message being sent needs at least one recipient. You can add them once, or you can enter them into an address book for future use.

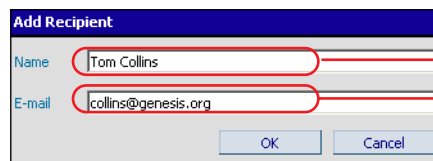
### Adding Recipients to a Message

To add recipients for one-time only use, select **Add** as shown in the following figure:



Click here to add a recipient for this message only.

The following appears:



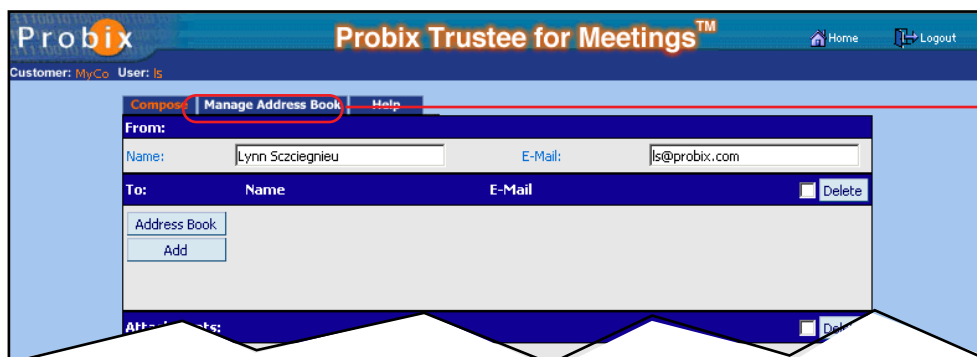
Enter the name of the recipient here.

Enter the e-mail address of the recipient here.

Enter the **Name** and **E-mail** address of the recipient you want to add, then click **OK** to add them to the list of recipients. The recipient you have added appears as an entry in the **Recipients** list. To return to the **Compose** form without adding the recipient, click **Cancel**.

### Managing the Address Book

The address book lets you store e-mail addresses for future use with Probix Trustee for Meetings.

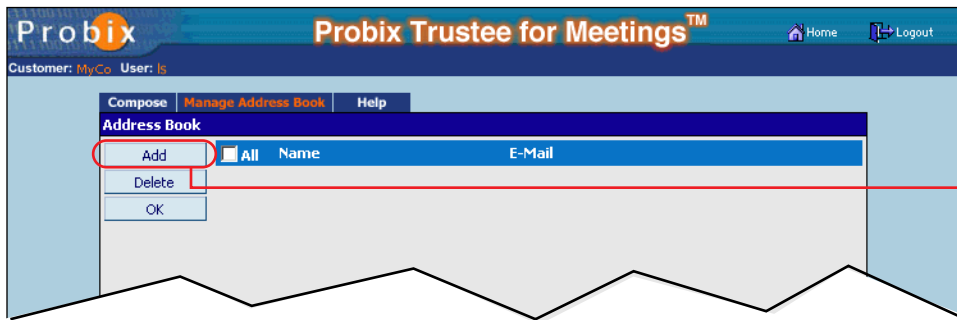


Click here to access the Probix Trustee for Meetings address book.



To use the address book, select the **Manage Address Book** tab in the top of the window. The Address Book appears.

The first time you use Probix Trustee for Meetings the address book is empty:



Click here to add a recipient to the address book to be saved for future use.

In the Address book, select **Add** to add a recipient. The **Add Recipient** form appears.

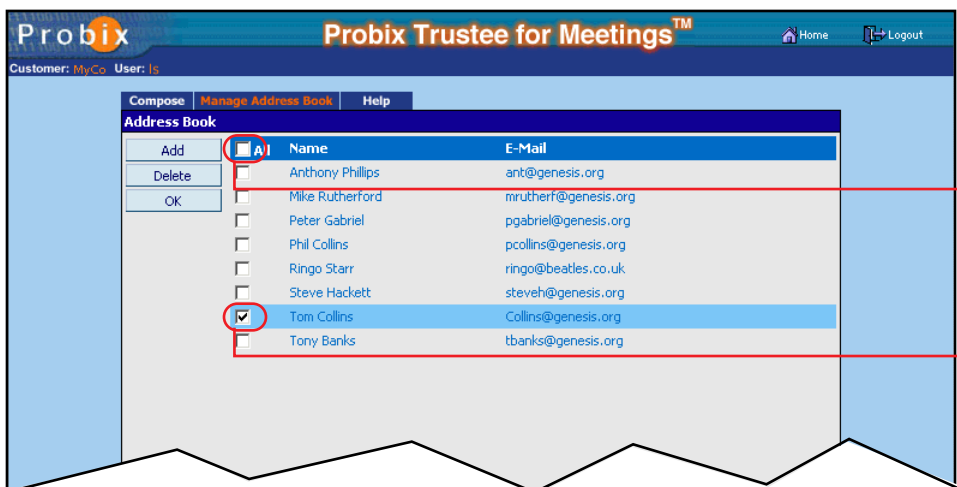
Enter the name of the recipient here.

Enter the e-mail address of the recipient here.

Enter the **Name** and **E-mail** address of the recipient you want to add to your address book, then click **OK** to add this address. To return to the **Manage Address Book** window without adding the **Name** and **E-mail** address, click **Cancel**. When you have added all the addresses you want to add to your address book, click the **Compose** tab to return to the **Compose** form.

## Deleting Entries From the Address Book

To delete an entry in the address book, select the checkbox next to each entry you want to delete. Select the checkbox next to **All** if you want to check or uncheck all entries.



Click here to select or deselect all recipients in the address book to be deleted.

Click here to delete the recipient to the right of the checkbox.

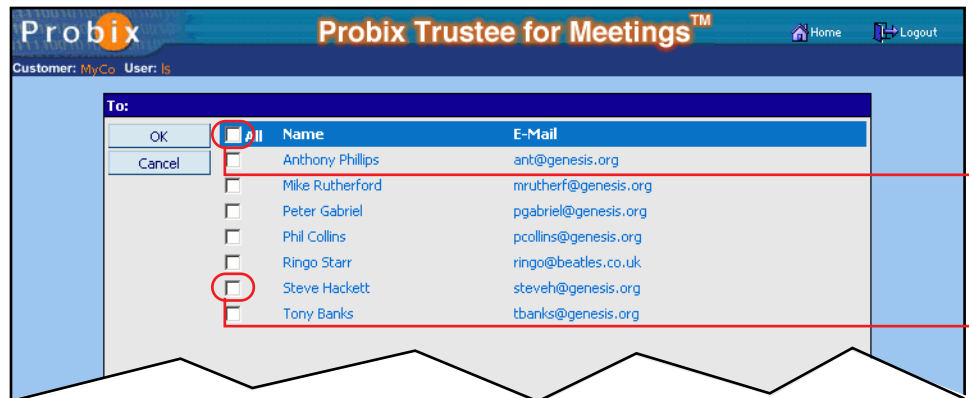
When you have finished selecting address book entries to be removed, click Delete.  
To return to the main Probix Trustee for Meetings form, select the Compose tab.

## Adding Address Book Entries to a Message

To add address book entries to a message:

Click **Address Book**.

A listing of the addresses in your address book appears.



Click here to select or deselect all recipients in the address book to be added.

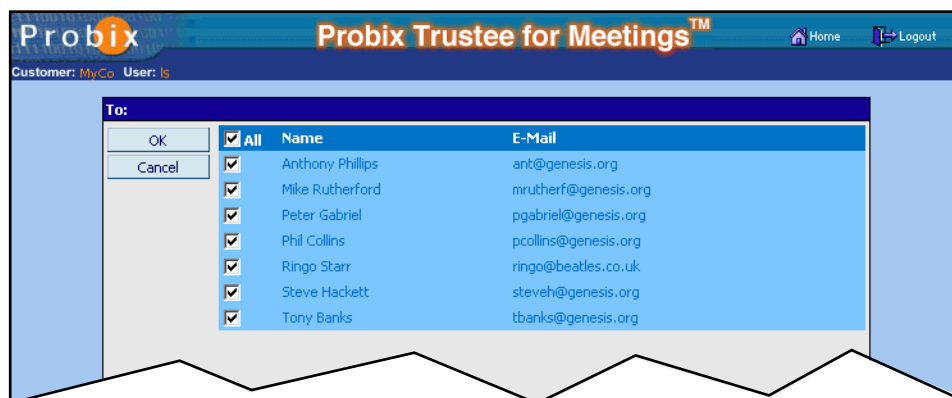
Click here to add the recipient to the right of the checkbox.

Select the checkboxes next to the recipients you want to add, or select the checkbox next to **All** to select or deselect all of them. Names must be checked to be added to the recipient list.

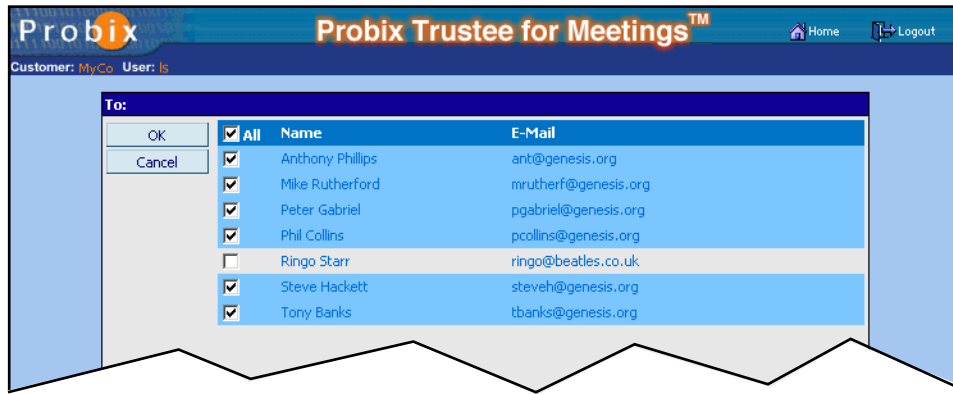
To return to the **Compose** form without adding entries from the address book, click **Cancel**. Otherwise, when you have selected the address book entries to be added to your list of recipients, click **OK**.

The recipients you selected in the **Address Book** are added to the list of recipients in the **Compose** form.

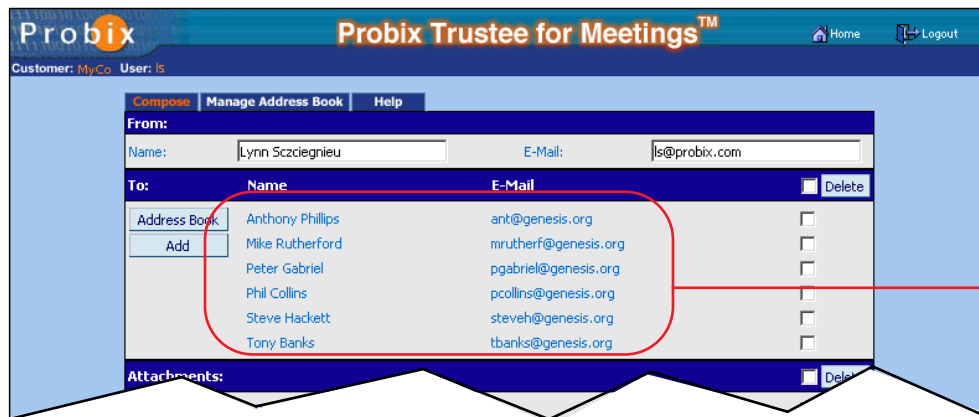
In the following example, the **All** box is selected, and all the addresses are checked.



Next, the box next to Ringo Starr is clicked again to deselect it.



Upon clicking **OK**, all the addresses checked (all except Ringo Starr) are added to the recipient list in the **Compose** form.



The users selected from the address book are added to the recipient list.

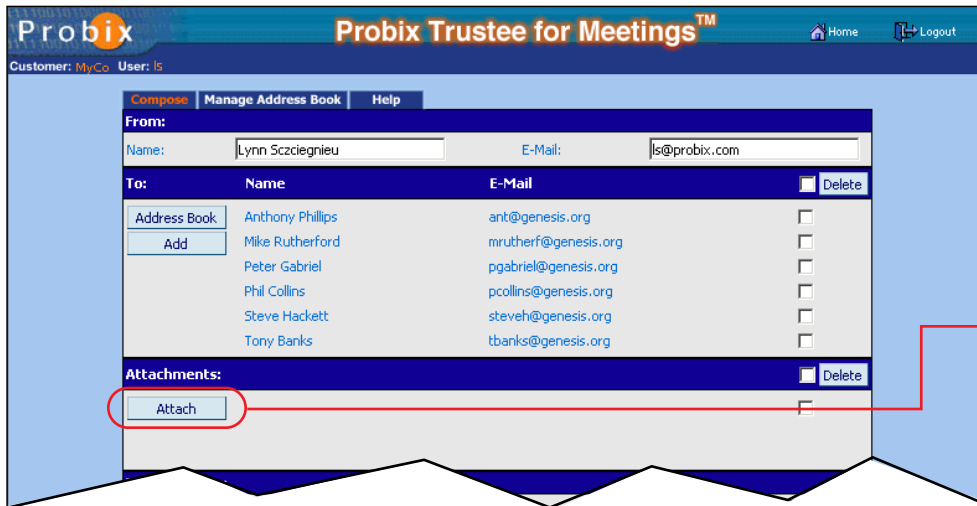
# ATTACH CONTENT

You must attach at least one content item to the list of Content Items before you can send out Trusted content.

## Adding Content Items to the Probix Trustee for Meetings Server

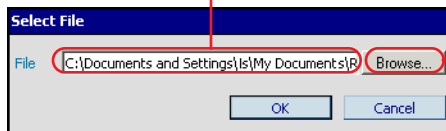
To attach a content item to the Probix Trustee for Meetings server:

Select **Attach**.



Click here to upload content to the Probix Trustee for Meetings server.

The **Select File** box appears.



Enter filename here.

Click here to use a graphical interface to navigate to the file.

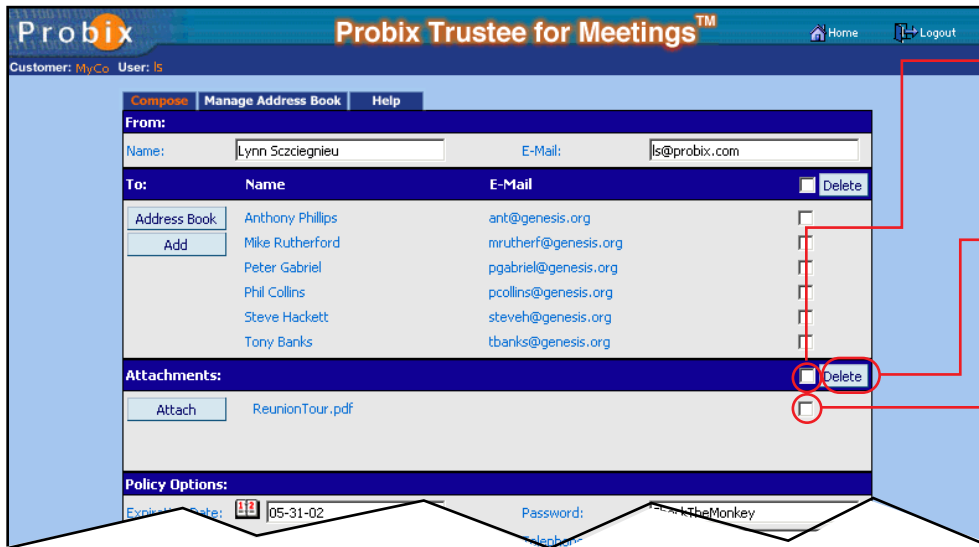
Either enter the name of the file you want to include or browse to the filename.

**Note:** Filenames are case-sensitive.

Click **OK** to add the filename to the list of **Attachments**, or click **Cancel** to return to the **Compose** form without adding the file.

## Deleting Attachments

To remove an attachment from the Probix Trustee for Meetings server, select the checkbox next to any content items you want removed from the list, then click **Delete**.



Click here to select all content to be deleted from the Probix Trustee for Meetings

Click here to delete selected content from the Probix Trustee for Meetings server.

Select the checkbox next to the filename to delete content from the Probix Trustee for Meetings server.

## SET UP POLICY OPTIONS

Policy options enable you to control whether each recipient must contact the sender before receiving the content, as well as whether they can print the content. Here you can also set up users besides the sender to be notified when content is accessed.

### Setting Up Content Access

The screenshot shows the 'Probix Trustee for Meetings' interface. The 'Policy Options' section is highlighted with red boxes and lines pointing to explanatory text on the right. The 'To:' field contains a list of recipients: Anthony Phillips (ant@genesis.org), Mike Rutherford (mrutherf@genesis.org), Peter Gabriel (pgabriel@genesis.org), Phil Collins (pcollins@genesis.org), Steve Hackett (steveh@genesis.org), and Tony Banks (tbanks@genesis.org). The 'Attachments' section shows 'ReunionTour.pdf'. The 'Policy Options' section includes: Expiration Date: 05-31-02; Password: ShockTheMonkey; Telephone: (empty); and four radio button options: 'Request recipients to call for password' (unselected), 'Send password with e-mail message' (unselected), 'Allow recipients to print documents once' (checked), and 'Notify me the first time documents are viewed or printed' (checked). A 'Notification List' button is also visible.

Click to use the Calendar Tool to choose the content expiration date, or enter it in the form MM-DD-YYYY.

Enter the case-sensitive password the recipients are to use to access the content on the Probix Trustee for Meetings server.

When you select this option you must also enter a phone number so recipients can get the password

Recipients cannot print the content unless you select this.

Select to receive e-mail when content is accessed.

Select one of the following:

- Request recipients to call for password
- Send password with e-mail message

If you select call, you must fill out the **Telephone** field.

Choose whether the recipient can print the file once. If this option is not selected, the recipient cannot print the file at all.

## Adding Users to the Notification List

If you check:

### Notify me the first time documents are viewed or printed

When each recipient reads the documents to which they have been granted access, the user listed in the **Name** and **E-mail** boxes at the top of the **Compose** form automatically receives a notification message saying the documents have been retrieved.

The screenshot shows the 'Compose' form in the Probix Trustee for Meetings interface. The 'From' field is filled with 'Lynn Szczegnieu' and 'ls@probix.com'. The 'To' field contains a list of recipients from an address book. The 'Policy Options' section has several checkboxes, with 'Notify me the first time documents are viewed or printed' checked. A 'Notification List' button is visible next to the checked option.

To:	Name	E-Mail	Delete
Address Book	Anthony Phillips	ant@genesis.org	<input type="checkbox"/>
Add	Mike Rutherford	mrutherf@genesis.org	<input type="checkbox"/>
	Peter Gabriel	pgabriel@genesis.org	<input type="checkbox"/>
	Phil Collins	pcollins@genesis.org	<input type="checkbox"/>
	Steve Hackett	steveh@genesis.org	<input type="checkbox"/>
	Tony Banks	tbanks@genesis.org	<input type="checkbox"/>

Attachments: ReunionTour.pdf

Policy Options:

Expiration Date: 05-31-02 Password: ShockTheMonkey Telephone:

Request recipients to call for password  
 Send password with e-mail message  
 Allow recipients to print documents once  
 Notify me the first time documents are viewed or printed

Notification List

The user shown here is automatically notified when Send Notification is checked.

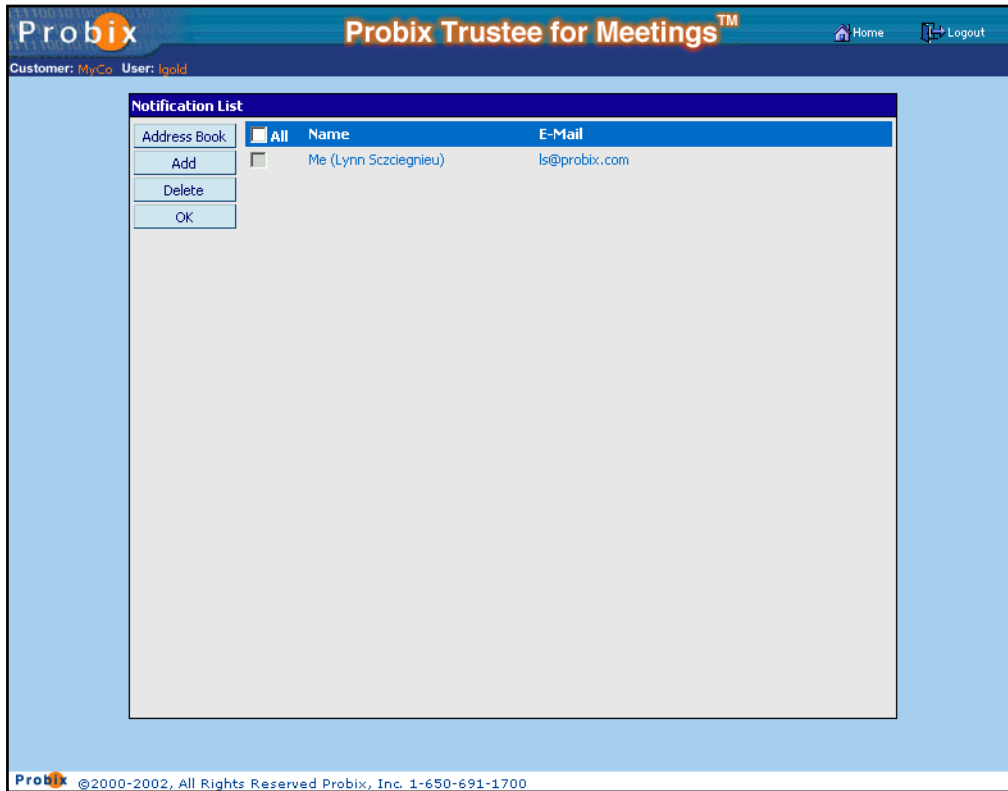
Select to receive e-mail when content is accessed.

Click to add addresses to the notification list.

The **Notification List** box is also ungrayed, enabling you to add additional people to be notified when each recipient access the documents.

To add users to the Notification List:

Click on the **Notification List** box. The Notification List form appears:



Click **Add**. The Add Recipient to Notification list form appears:

The screenshot shows a form titled "Add Recipient to Notification List". It has two input fields: "Name" and "E-mail". The "Name" field contains the text "Bill Graham Productions" and the "E-mail" field contains "booking@billgraham.com". Below the input fields are "OK" and "Cancel" buttons. Red circles highlight the text in both input fields, with red lines pointing to the explanatory text on the right.

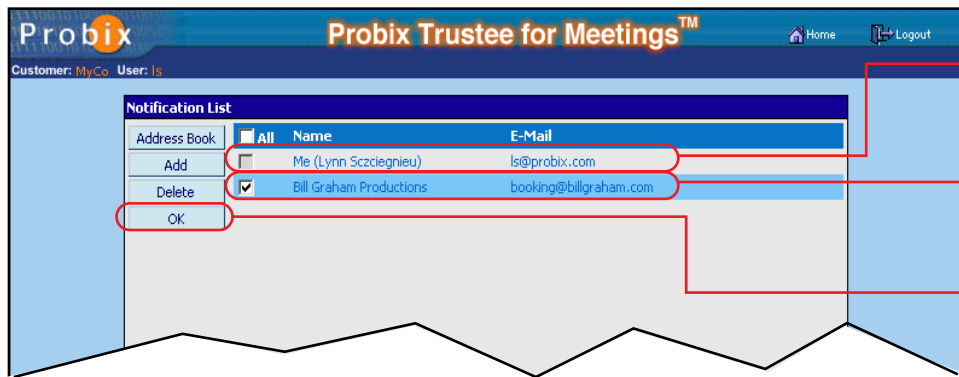
Enter the name of the recipient here.

Enter the e-mail address of the recipient here.

Enter the **Name** and **E-mail** address of the user who is also to receive a notification message. Click **OK** to add them to the notification list and return to the **Notification List** window, or click **Cancel** to return to the **Notification List** window without adding them to the list.

The extra name appears and is now part of the notification list.





The sender is automatically on the Notification List.

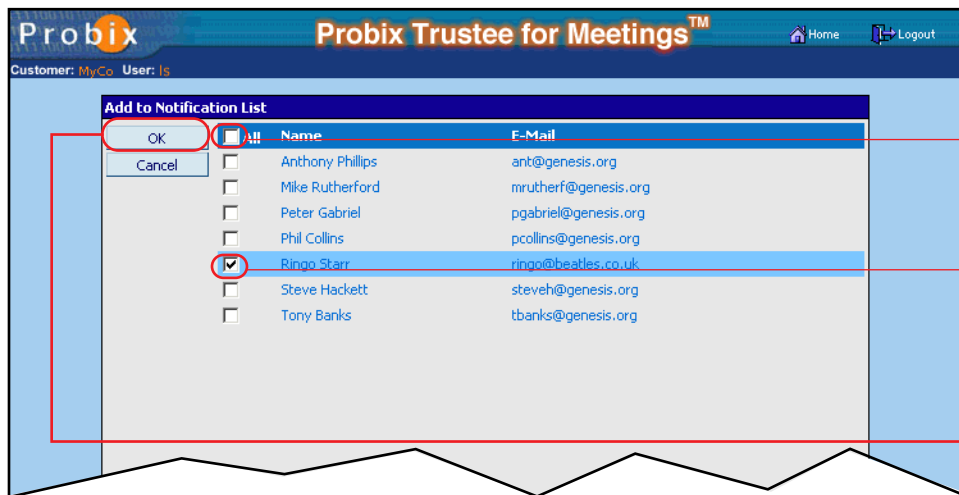
The recipient is now on the Notification List.

Click to add the user to the Notification List and return to the Compose form..

**Note:** The name of the user sending the document automatically appears on the notification list. Click **OK** to return to the **Compose** form.

## Adding Notification Recipients From the Address Book

To add notification recipients from the address book, click Address Book. A window similar to the following appears:



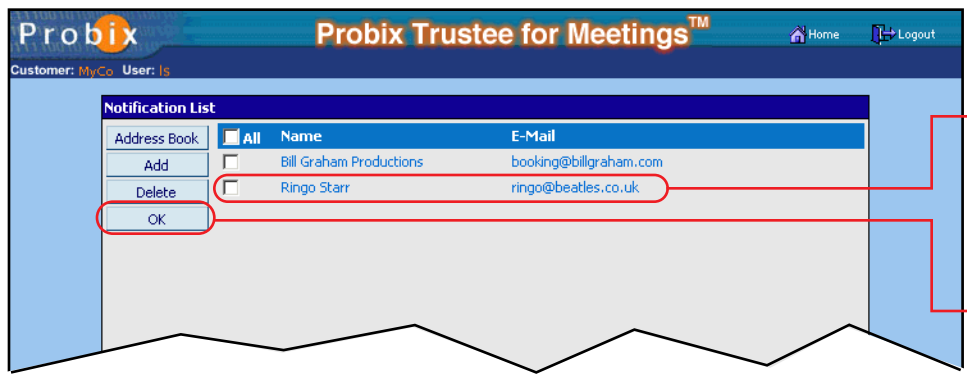
Select the **All** checkbox to select or deselect all users in the address book to be added to the Notification List.

Select the checkbox next to each user to be added to the Notification List.

Click to have all selected users added to the Notification List.

Select the checkbox next to each person you want to add to the notification list, or select the All checkbox to add all the people in your address book to the notification list. To return to the **Notification List** form without adding any addresses from the address book, click **Cancel**.

Once you have selected whoever you want to add (in this case we have selected Ringo Starr), click **OK**. The selected addresses from your address book are added to the notification list.



User has been added from the address book to the Notification List.

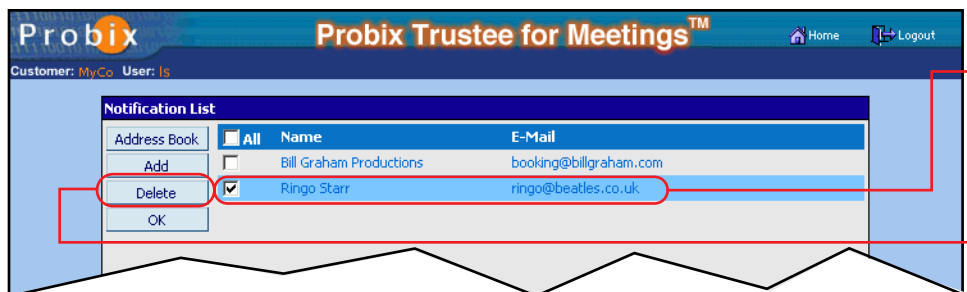
Click to add these users to the Notification List and return to the **Compose** form.

Click **OK** to return to the **Compose** form.

**Note:** The **Notification List** is not visible from the **Compose** form, but the addresses are added.

## Deleting a Recipient From the Notification List

To delete recipients from the notification list, check the box next to each name you want to delete, then click **Delete**.



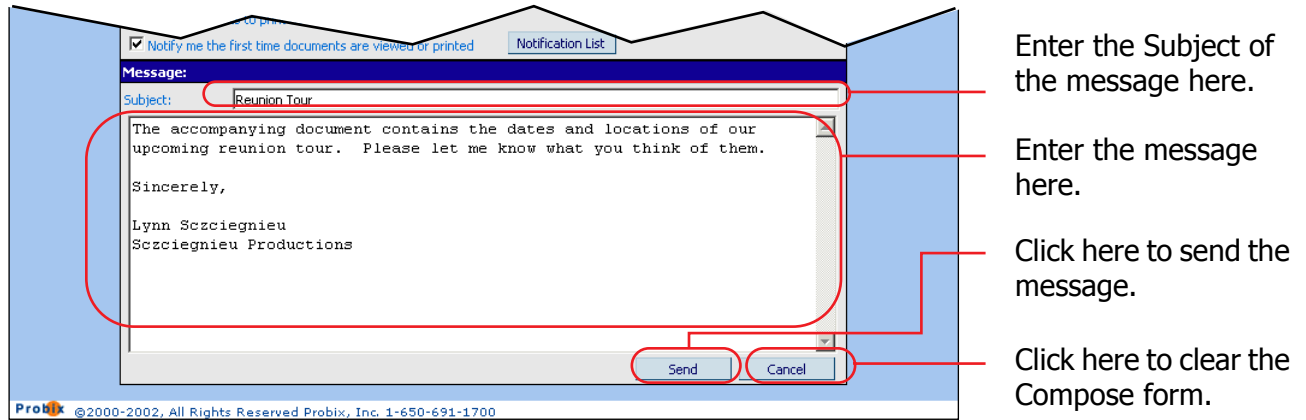
Select the checkbox next to the user to be deleted from the Notification List.

Click to delete selected users from the Notification List.

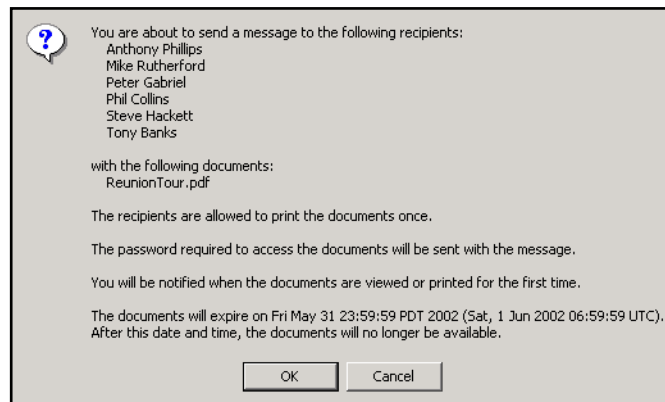
# SEND THE MESSAGE

In the **Compose** form, enter the subject and text of the (optional) message to be prepended to the notification message.

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Select **Send** to send the message, or select **Cancel** to clear all values on the form. A confirmation message appears similar to the following:



Click **OK** to send the message and make the content available on the Probox Trustee for Meetings server. A final confirmation message similar to the following appears:



The recipients receive e-mail telling them how to retrieve the Probox-protected content, along with how long they have to retrieve it and whether they can print it once.

