



Probix Trustee

For Meetings

Release 1.8

February 4, 2003

Probix, Inc.

www.probix.com
883 N. Shoreline Blvd, Bldg. A
Mountain View CA, 94043 USA

Phone: (650) 691-1700

Information contained in this document is subject to
change.

DISCLAIMER

Every effort has been made to make this document as complete and as accurate as possible, but no warranty or fitness is implied. The information provided is on an "as is" basis. Probix shall have neither liability nor responsibility to any person or entity with respect to loss or damages arising from the information contained in this document.

Table of Contents

USING PROBIX TRUSTEE FOR MEETINGS	5
LOG INTO THE PROBIX TRUSTEE FOR MEETINGS SERVER	6
ENTER THE SENDER INFORMATION	7
SET UP A LIST OF RECIPIENTS.	8
Adding Recipients to a Message	8
Managing the Address Book.	9
Deleting Entries From the Address Book	10
Adding Address Book Entries to a Message	10
ATTACH CONTENT	12
Adding Content Items to the Probix Trustee for Meetings Server.	12
Deleting Attachments	13
SET UP POLICY OPTIONS	14
Setting Up Content Access.	14
Enable Watermarking (Optional)	15
Adding Users to the Notification List	15
Adding Notification Recipients From the Address Book	18
Deleting a Recipient From the Notification List.	19
SEND THE MESSAGE	20

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

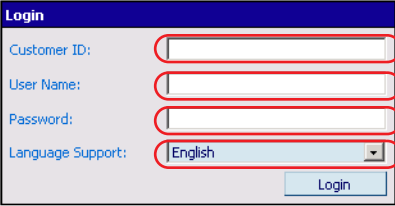
To connect to the Probix Trustee for Meetings server, enter the following URL into your browser:

`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:

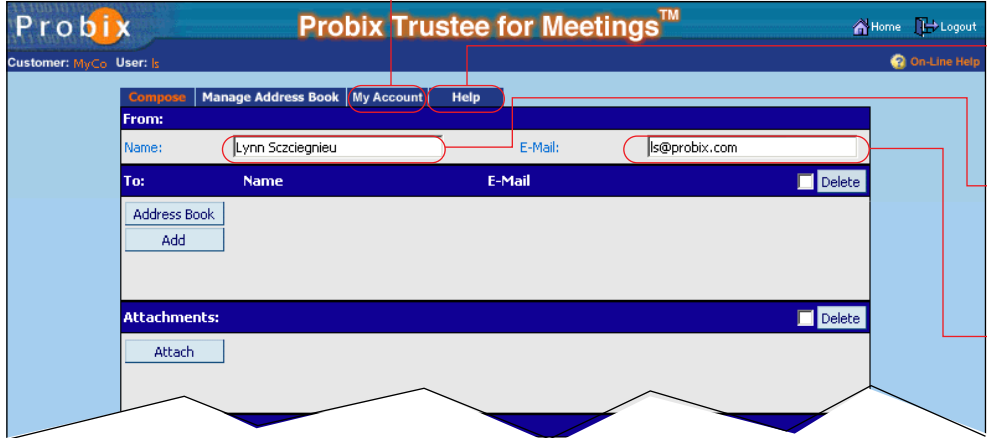
- Customer ID - The name of your company as registered with the Probix Trustee for Meetings server. Although this is case-independent, it will appear in whatever case it was entered into the Probix Trustee for Meetings server.
- User Name - Enter your user name. This is case-independent.
- Password - 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.



Click to change your password.

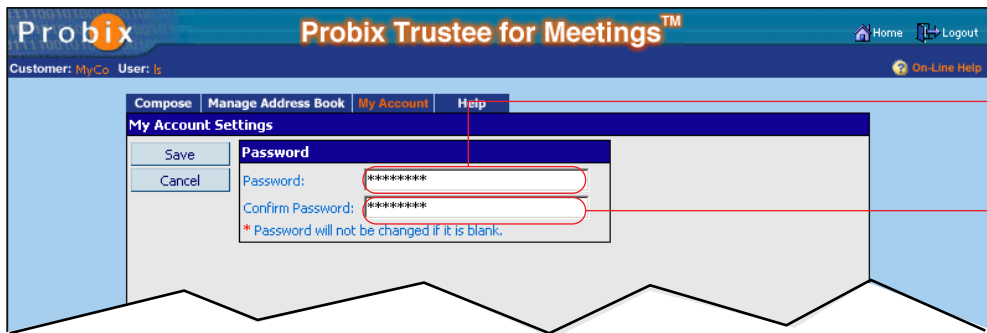
Click to go to a tab for online help (this manual).

Enter the name of the person sending the content here.

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.

Note: Before you proceed further, you may want to change your Probix Trustee for Meetings account information. To do so, click on the **My Account** tab. The My Account Settings form appears.



Enter a new password.

Re-enter the new password.

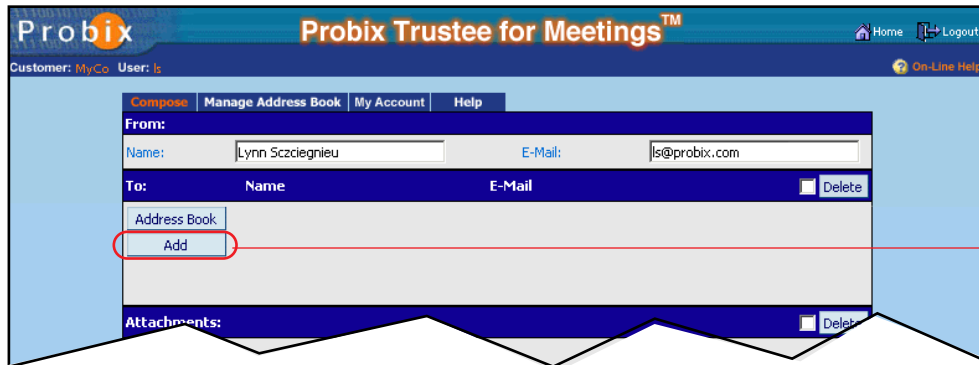
Enter and re-enter a new password. Click **Save** to use the new password, or click **Cancel** to keep your existing password.

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:

Add Recipient	
Name	<input type="text"/>
E-mail	<input type="text"/>
<input checked="" type="checkbox"/>	Add recipient to the address book
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

Enter the name of the recipient here.

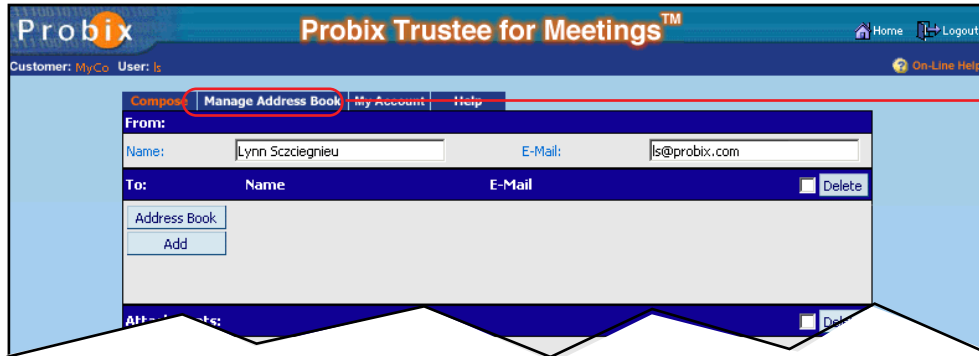
Enter the e-mail address of the recipient here.

Check to add the recipient to your address book for future use.

Enter the **Name** and **E-mail** address of the recipient you want to add. If you want to save the recipient in your address book for future use, check **Add recipient to the address book**. Click **OK** to add the recipient 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

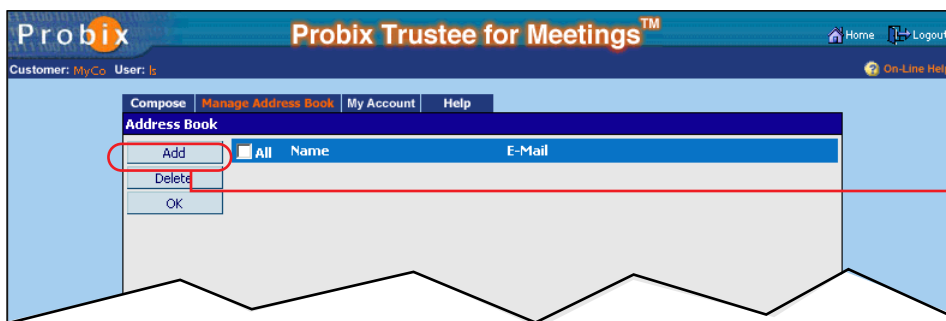
The address book lets you store e-mail addresses for future use with Probix Trustee for Meetings.



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.

A screenshot of the 'Add Recipient' dialog box. It has two input fields: 'Name' with the text 'Phil Collins' and 'E-mail' with the text 'pcollins@genesis.org'. There are 'OK' and 'Cancel' buttons at the bottom.

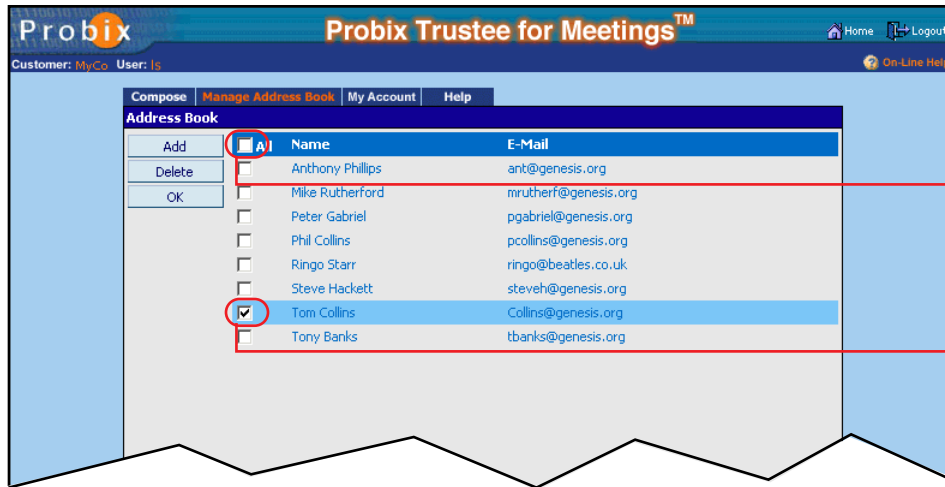
Enter the name of the recipient here.

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.

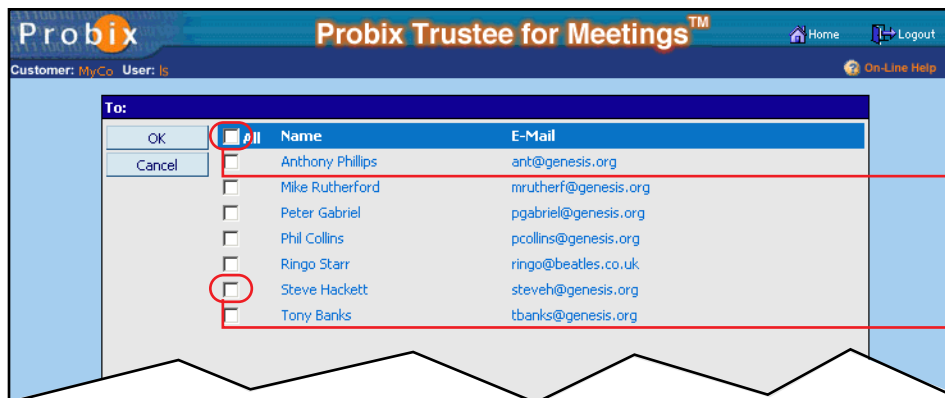
To return to the main Probix Trustee for Meetings form, select the Compose tab.

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.

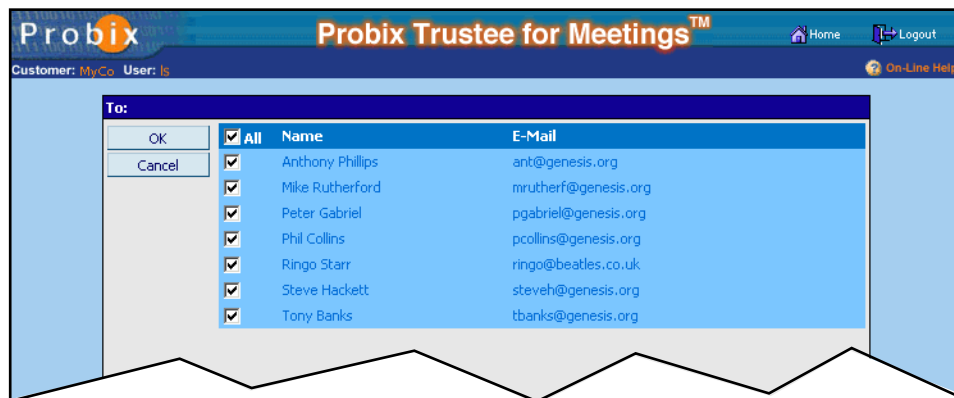
Click here to add the recipient to the right of the checkbox.

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.

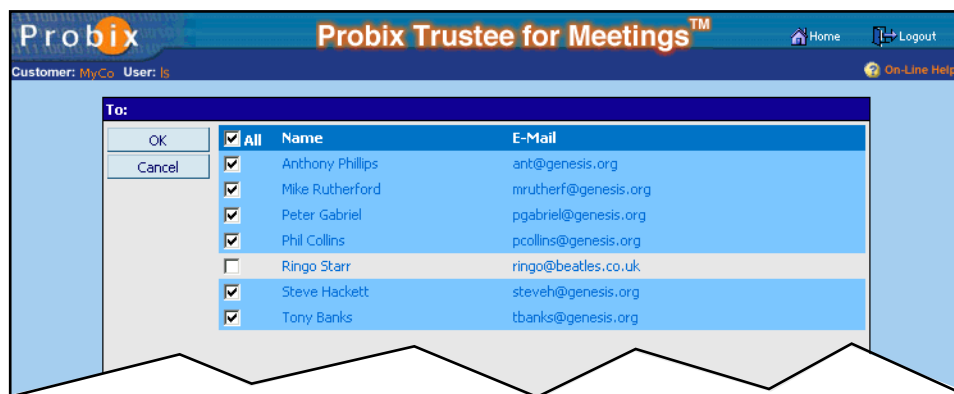
To return to the **Compose** form without adding entries from the address book, click **Cancel**. Otherwise, when you have selected the address book entries to be added to your list of recipients, click **OK**.

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

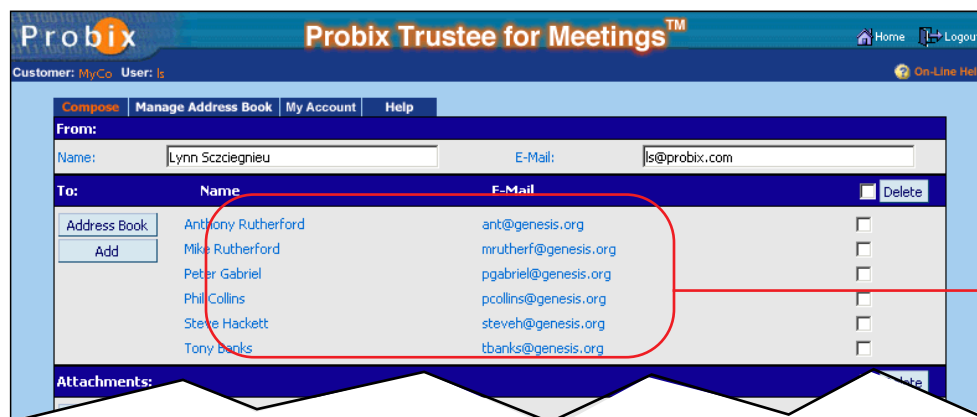
In the following example, the **All** box is selected, and all the addresses are checked.



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.

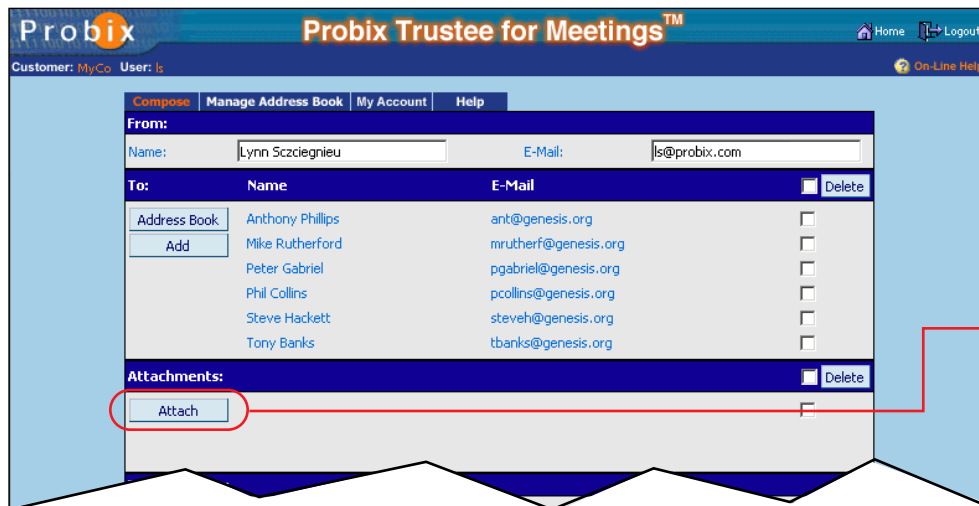
ATTACH CONTENT

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

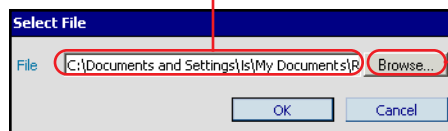
To attach a content item to the Probix Trustee for Meetings server:

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.

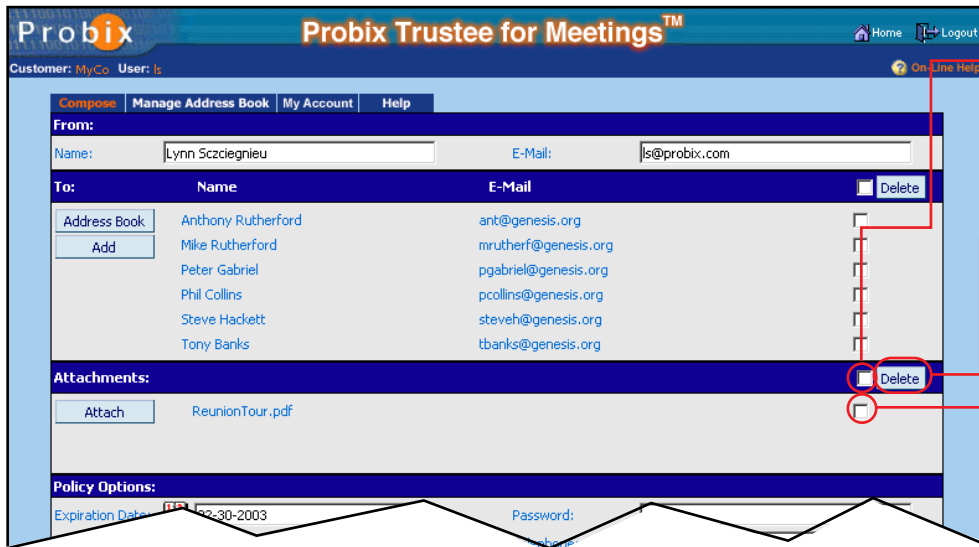
Either enter the name of the file you want to include or browse to the filename.

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. The 'Expiration Date' is set to 02-30-2003. The 'Password' and 'Telephone' fields are empty. The 'Request recipients to call for password' checkbox is unchecked. The 'Send password with e-mail message' checkbox is unchecked. The 'Limit recipients to view the documents only once' checkbox is unchecked. The 'Allow recipients to print documents only once' checkbox is checked. The 'Enable watermarking' checkbox is checked. A 'Notification List' button is located below the checkboxes.

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 enable watermarking of printed content.

Select to send the password to access the content with the message.

Recipients can only view content once.

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.

You may also select the following options:

- **Allow recipients to view the documents only once**

This option prevents someone from passing the information to someone else because the document specified in the URL can only be viewed by the first person who accesses it.

- **Allow recipients to print documents only once**

This option both *enables* printing of the document and enables the recipient to print a single copy of the content. The recipient cannot print the document *at all* unless this option is selected.

Note: All content is automatically protected so it cannot be saved by the recipients.

Enable Watermarking (Optional)

Watermarking is when a light gray identifier appears in the background of printed content.

When you select the **Limit recipients to print documents once** box, the **Enable watermarking** box is ungrayed. To have your content watermarked when the recipient prints it, select the **Enable watermarking** box in the **Compose** form. Watermarking is only enabled when printing is enabled.

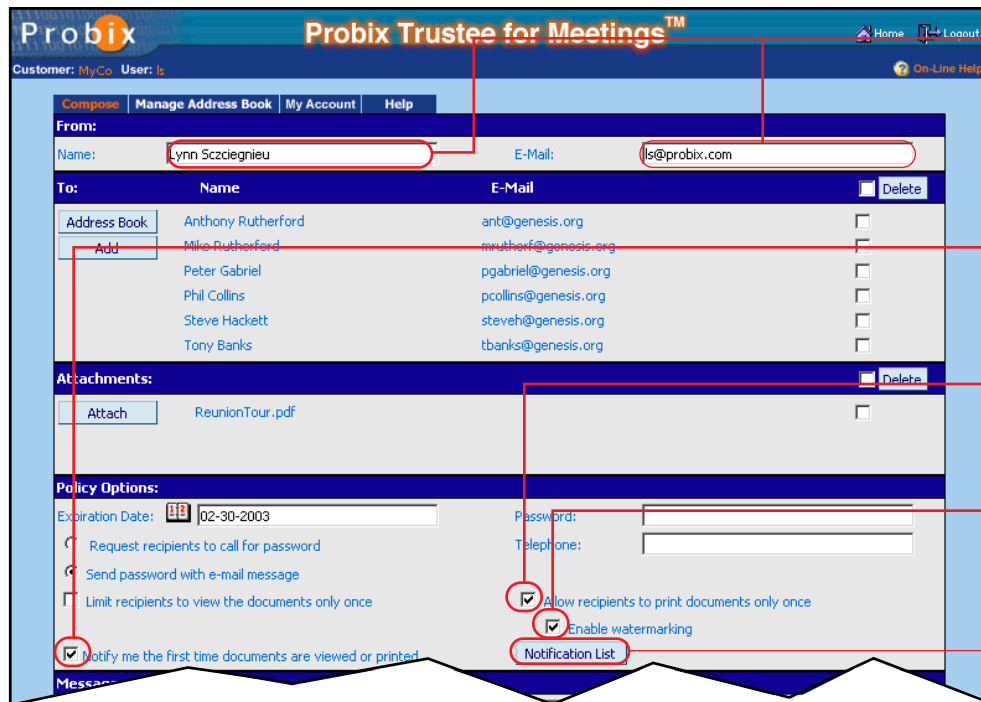
Note: A watermark does not always appear on the watermarked document when it is being viewed on screen, but always appears on printed versions of the protected document.

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 to automatically receive a notification message when the documents are first accessed.



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

Select to receive e-mail when content is accessed.

Click to let recipients print the protected content once.

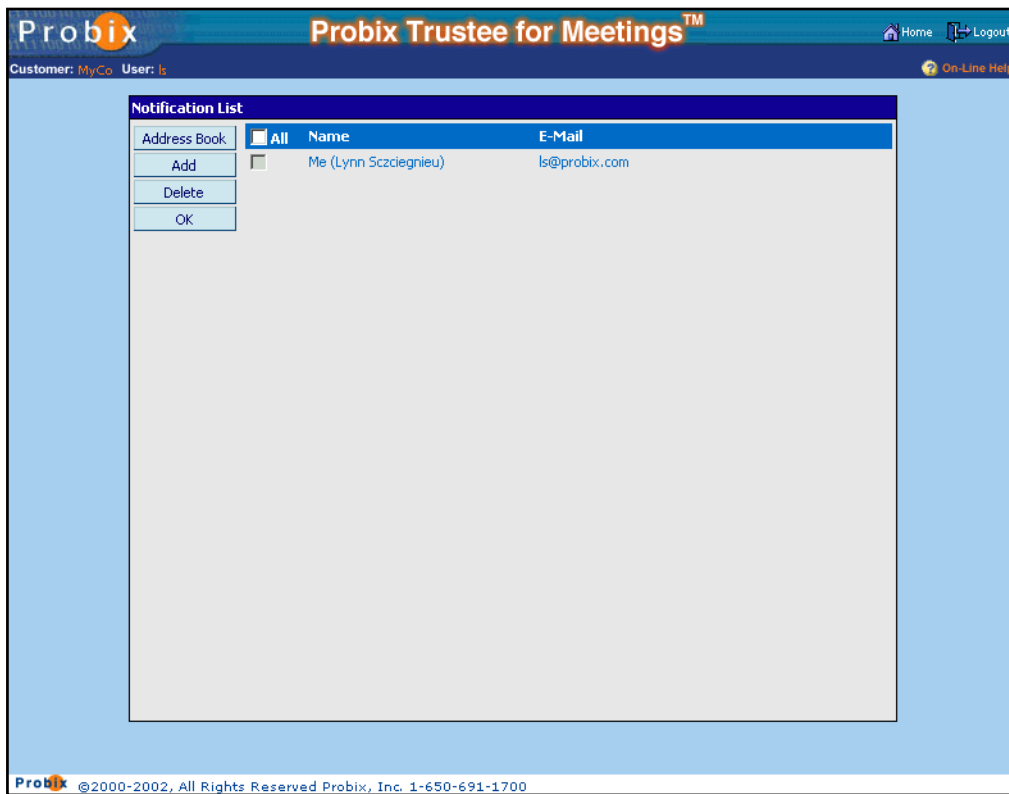
Click to have a watermark appear on printed content.

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 accesses 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:

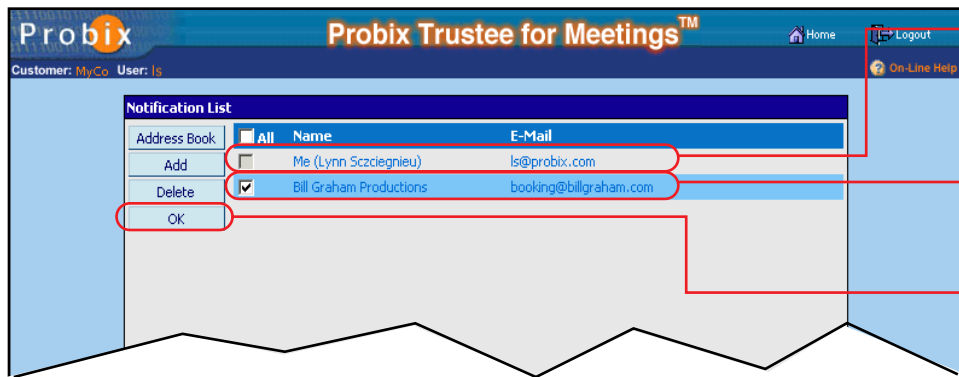
The dialog box is titled "Add Recipient to Notification List". It has two text input fields: "Name" with the value "Bill Graham Productions" and "E-mail" with the value "booking@billgraham.com". There are "OK" and "Cancel" buttons at the bottom.

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.

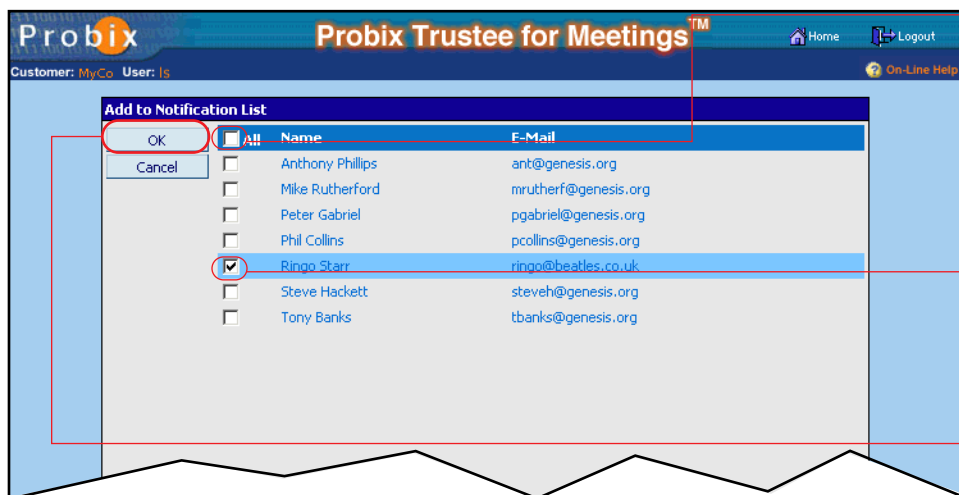
The recipient is now on the Notification List.

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:



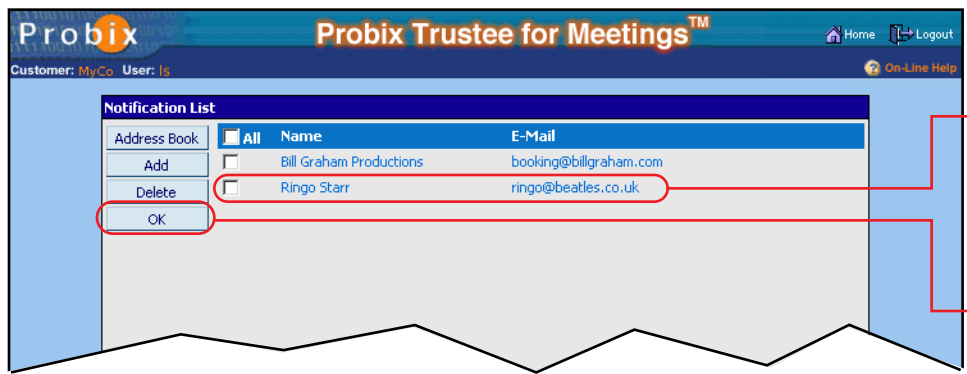
Select the **All** checkbox to select or deselect all users in the address book to be added to the Notification List.

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**.

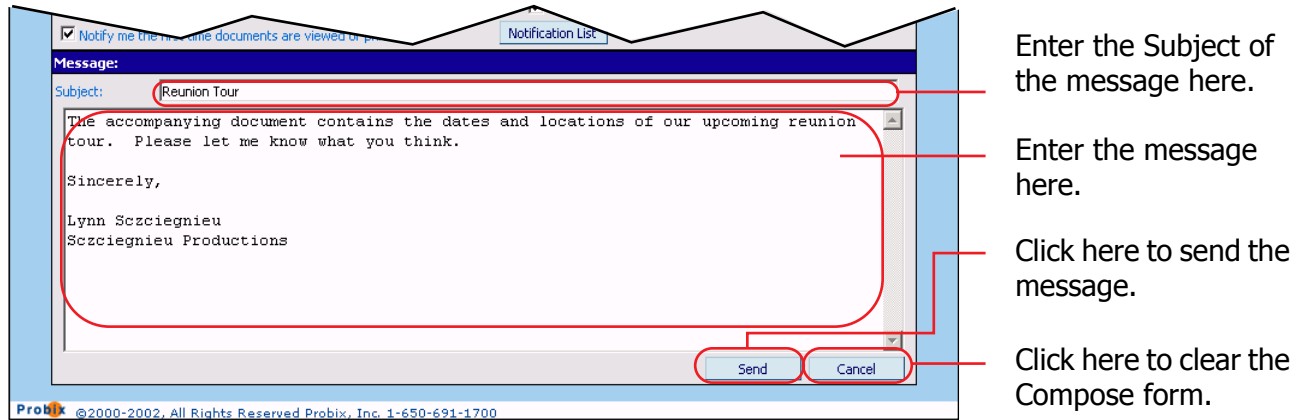


Select the checkbox next to the user to be deleted from the Notification List.

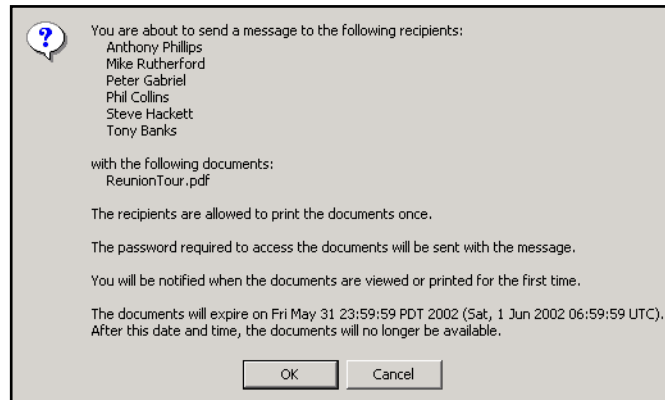
Click to delete selected users from the Notification List.

SEND THE MESSAGE

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



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 Probix Trustee for Meetings server. A final confirmation message similar to the following appears:



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