



Probix Trustee

For Outlook

Release 2.1

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INTRODUCTION

Probix Trustee for Outlook™ is an add-in for Microsoft Outlook that enables you to share content at a protection level of your choice. Using a Microsoft Outlook-based interface, you can create policies that disable or limit printing capabilities of content, watermark printed documents, and limit viewing times. Probix Trustee for Outlook then enforces these policies to guarantee your documents are used only as intended.

Note: Probix Trustee for Outlook does *not* support Outlook Express.

REGISTERING FOR THE PROBIX TRUSTEE FOR OUTLOOK SERVICE

Your Probix system administrator needs to create an account on the Probix Trustee for Outlook server before you can send e-mail using Probix Trustee for Outlook. Recipients of a Probix Trustee for Outlook message do *not* need to be registered with the Probix Trustee for Outlook server.

When you are registered, your Probix system administrator provides you with an e-mail message containing the following information you will need when configuring Probix Trustee for Outlook:

- the URL from which you can download the Probix Trustee for Outlook add-in
- the Probix Trustee for Outlook Server E-Mail address
- your Probix Trustee for Outlook User Information:
 - **Company Name:** the name of your company as registered with Probix Trustee for Outlook (case-insensitive)
 - **User Name:** your name (case-insensitive)
 - **User Login:** your user ID name registered with the Probix Trustee for Outlook server (case-insensitive)
 - **Password:** the password associated with this account (case-sensitive)
 - **Reply E-mail:** your full e-mail address, including hostname
 - **Contact Phone Number:** a reminder to put your phone number in this field

Make a note of this information for use during installation and configuration.

INSTALLATION AND CONFIGURATION

Probix Trustee for Outlook™ is an add-in for Microsoft Outlook that enables you to share content at a protection level of your choice. Using a Microsoft Outlook-based interface, you can create policies that disable or limit printing capabilities, watermark printed documents, and limit viewing times. Probix Trustee for Outlook then enforces these policies to guarantee your documents are used only as intended.

To install the Probix Trustee for Outlook add-in to MS Outlook:

1. Verify Your Environment for the Probix Trustee for Outlook Add-In.
2. Install the Probix Trustee for Outlook Add-In.
3. Configure MS Outlook for Probix Trustee for Outlook.

This section explains how to accomplish these tasks.

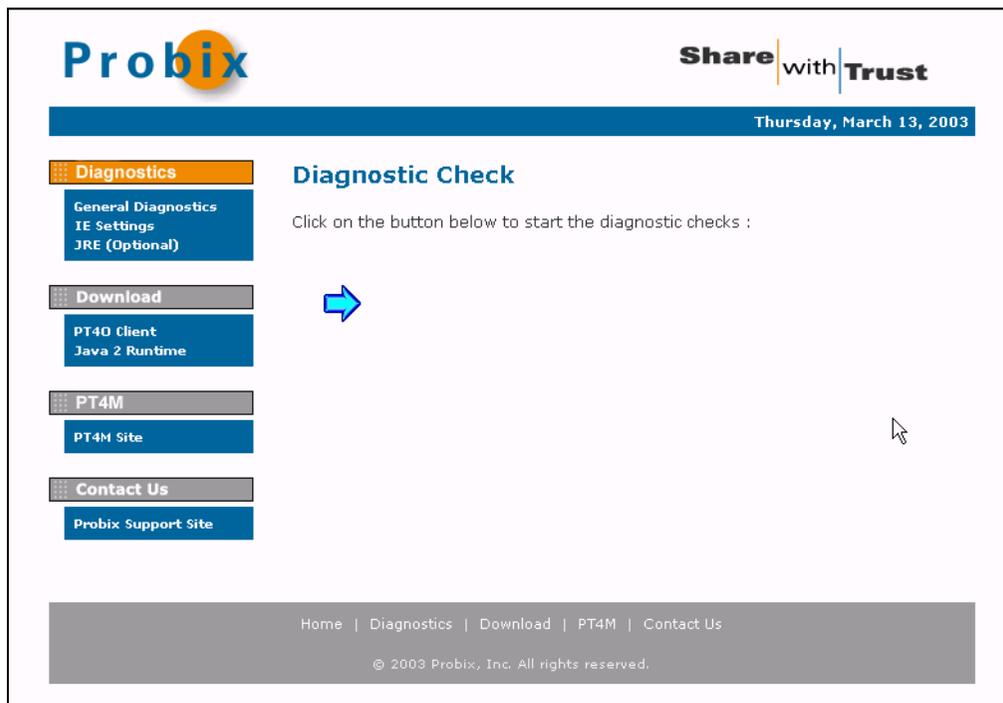
Verify Your Environment for the Probix Trustee for Outlook Add-In

If this is the first time you are running Probix Trustee or Probix Trustee for Outlook, or if you have problems accessing protected content, use the PC Diagnostics tool to make sure your system is properly set up to run the Probix software. The URL for the PC Diagnostics tool is:

http://probix_server/probix/diagnostic.htm

where *probix_server* is the URL for your Probix Server.

A screen similar to the following appears:



Click click the right arrow to run the first set of diagnostics. A screen similar to the following appears:

Probix Share with Trust

Thursday, March 13, 2003

Diagnostics

- General Diagnostics
- IE Settings
- JRE (Optional)

Download

- PT40 Client
- Java 2 Runtime

PT4M

- PT4M Site

Contact Us

- Probix Support Site

General Diagnostics

Javascript	Passed	Details
Browser	Supported	Details
Platform	Supported	Details
Cookies	Passed	Details
Firewall Filtering	Passed	Details

Diagnostic Details :

Javascript Check

A browser that supports javascript is required in order to retrieve protected content.

Test Results:

Javascript	Passed
------------	--------

Further down the page you can see more tests and their results:

Browser & Platform Check

The following browsers and operating systems are supported:

- MS Internet Explorer 5.01 or higher on Win98 2nd Edition, WinMe, Windows 2000, and Windows XP

Test Results:

Browser name	Microsoft Internet Explorer
Browser version	4.0 (compatible; MSIE 6.0; Windows NT 5.0)
Agent string	Mozilla/4.0 (compatible; MSIE 6.0; Windows NT 5.0)
Platform	Win32

Browser	Supported
Operating System	Supported

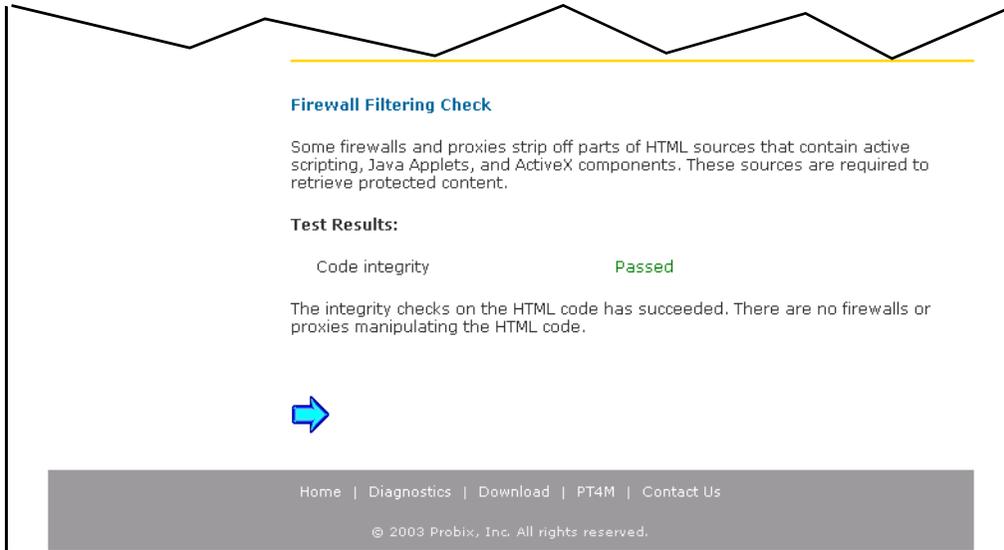
Browser Cookie Check

A browser that supports cookies is required in order to retrieve protected content.

Test Results:

Cookie support	Passed
----------------	--------

At the bottom of the screen there is a right arrow.



Firewall Filtering Check

Some firewalls and proxies strip off parts of HTML sources that contain active scripting, Java Applets, and ActiveX components. These sources are required to retrieve protected content.

Test Results:

Code integrity Passed

The integrity checks on the HTML code has succeeded. There are no firewalls or proxies manipulating the HTML code.



Home | Diagnostics | Download | PT4M | Contact Us

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Click the right arrow to continue running diagnostics. A screen similar to the following appears:



Probix Share with Trust

Thursday, March 13, 2003

Diagnostics

General Diagnostics
IE Settings
JRE (Optional)

Download

PT4M Client
Java 2 Runtime

PT4M

PT4M Site

Contact Us

Probix Support Site

Internet Explorer Security Settings Check

If you are running Internet Explorer, some security settings need to be enabled to allow the download and execution of plug-ins that are used to view certain types of protected documents (i.e. PDF, XLS, DOC, PPT).

To check your Internet Explorer settings, click **here**. Due to Internet Explorer's security settings, you will need to save the file to a local disk before you can run it. Make sure that the saved file has a .wsf extension. Then use Windows Explorer to browse to the directory where you saved the file and then double click on the file to run it. You need to have Windows Scripting Host in order for the script to execute.

The following settings need to be set to enable or prompt :

- Download Signed ActiveX Controls
- Run ActiveX controls and plug-ins

To change your security settings, click on the Tools menu and then select the Internet Options menu item. When the property sheets appear, select the Security tab. Then select the Internet zone at the top and then press the Custom Level button. You can enable the specified settings by clicking on the appropriate options. Please consult Microsoft documentation for more information if your browser settings are not configurable in the steps mentioned.



Click on the red-highlighted word **here** to run the IE Security Settings Check. A window similar to the following appears:



Click **Open** to run the diagnostic. A window similar to the following appears:



Click **OK**.

Your system is now set up for installation of the Probix Trustee for Outlook add-in.

INSTALLATION AND CONFIGURATION OF PROBIX TRUSTEE FOR OUTLOOK

This section explains how to install and configure the Probix Trustee for Outlook add-in.

Supported Operating Systems and Content Types

Probix Trustee for Outlook supports the following operating systems and content types:

Platform	Supported Versions
OS	Windows 98, Windows ME, Windows NT 4.0, Windows 2000, Windows XP
Language	English, Japanese, Korean
MS Office	2000, XP
Adobe Acrobat	Acrobat Reader 5.0, 5.1; Adobe Acrobat 5.0, 5.05
Browser	MS Internet Explorer 5.0, 5.1, 5.5, 6.0
MS Outlook	2000, 2002
Hangul Word	HWP 2002
Content Type	PDF, Word, PPT, Excel, TXT, JPG, HWP 2002, HTML

HTML Support

HTML files are supported with the following restrictions:

- JavaScript is supported except for functions that manipulate windows (window.*).
- Applets are supported, but are unencrypted (clear).
- Embedded objects and third-party plugins are supported, but they are not always protected.
- Sessions are not supported.
- GET and POST requests are sent unencrypted, but GET and POST responses requesting content protected by Probix are sent encrypted. Content that is not protected by Probix cannot be retrieved using these methods on a protected HTML page.

MS Word File Support

Most MS Word features are supported in protected documents, but with the following restrictions:

- Saving is disabled.
- Printing is allowed per the print policy set by the sender.
- Cut and copy are disabled.
- Print screen is disabled.
- Screen captures are prevented.
- Drag and drop is disabled.
- The document is covered when the browser plugin window is not the focus window.
- Toolbars are disabled.
- You cannot add toolbars from the **View->Toolbars** menu.
- The formula bar does not appear, even from the **View->Toolbars** menu.
- Hot keys (such as **Ctrl-P** for print) are disabled.

Probix Trustee for Outlook does not allow recipients to edit (modify) the Word documents. Probix Trustee for Outlook uses MS Word's native "Comments" protection capability as found in the **Tools->Protection** menu. In this mode:

- Editing of the document is not allowed.
- Some types of embedded images can be moved inside the document, such as MS Word Art objects.
- You cannot hide lower level sentences in Outline mode.
- The filename field in the document is incorrect.
- In Office 2000, page numbering is incorrect.

MS Excel File Support

Most Excel features are supported in protected documents, but with the following restrictions:

- Saving is disabled.
- Printing is allowed per the print policy set by the sender.
- Cut and copy are disabled.

- Print screen is disabled.
- Screen captures are prevented.
- Drag and drop is disabled.
- The document is covered when the browser plugin window is not the focus window.
- Toolbars are disabled.
- You cannot add toolbars from the **View->Toolbars** menu.
- The formula bar does not appear, even from the **View->Toolbars** menu.
- Hot keys (such as **Ctrl-P** for print) are disabled.

Probix Trustee for Outlook allows recipients to edit (modify) the Excel documents, depending upon whether the sender gives them the option to do this, by using Excel's native protection capabilities. Probix Trustee for Outlook enables the integrity of documents but does not require it. A recipient may also modify an Excel document and print it with a watermark, if allowed.

Probix Trustee for Outlook uses MS Excel's native "Protect Sheet" and "Protect Workbook" capabilities as found in the **Tools->Protection** menu. In this mode:

- Hyperlinks within Excel document are supported.
- Links from a protected Excel document to an unprotected Excel document are supported.
- All other behaviors expected from a Sheet-Protected Excel document.
- At "Protect Sheet" level, sheets set within Workbooks can be altered (insert, remove, rename).
- At "Protect Workbook" level, the aforementioned applies, except sheets set within Workbooks cannot be altered.

HWP File Support

Probix Trustee for Outlook supports HWP 2000 protected documents, but with the following restrictions:

- Saving is disabled.
- Printing is allowed per the print policy set by the sender.
- Cut and copy are disabled.
- Print screen is disabled.
- Screen captures are prevented.
- Drag and drop is disabled.
- The document is covered when the browser plugin window is not the focus window.
- Toolbars are disabled.
- Hot keys (such as **Ctrl-P** for print) are disabled.

Note: You must have HWP 2000 installed to view HWP 2000 or HWP 97 format files.

Install the Probix Trustee for Outlook Add-In

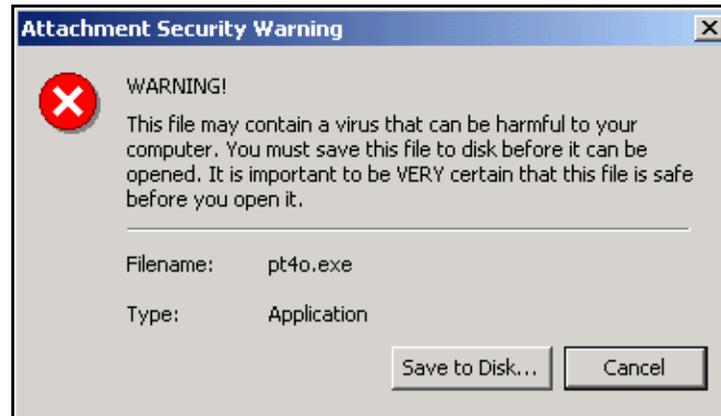
Note: The Probix Trustee for Outlook installation process may take longer if Outlook startup on your system is normally slow, you have a large amount of e-mail in your Outlook inbox, or the Outlook data

file is very large.

To install the Probix Trustee for Outlook add-in:

1. Retrieve the installation program.

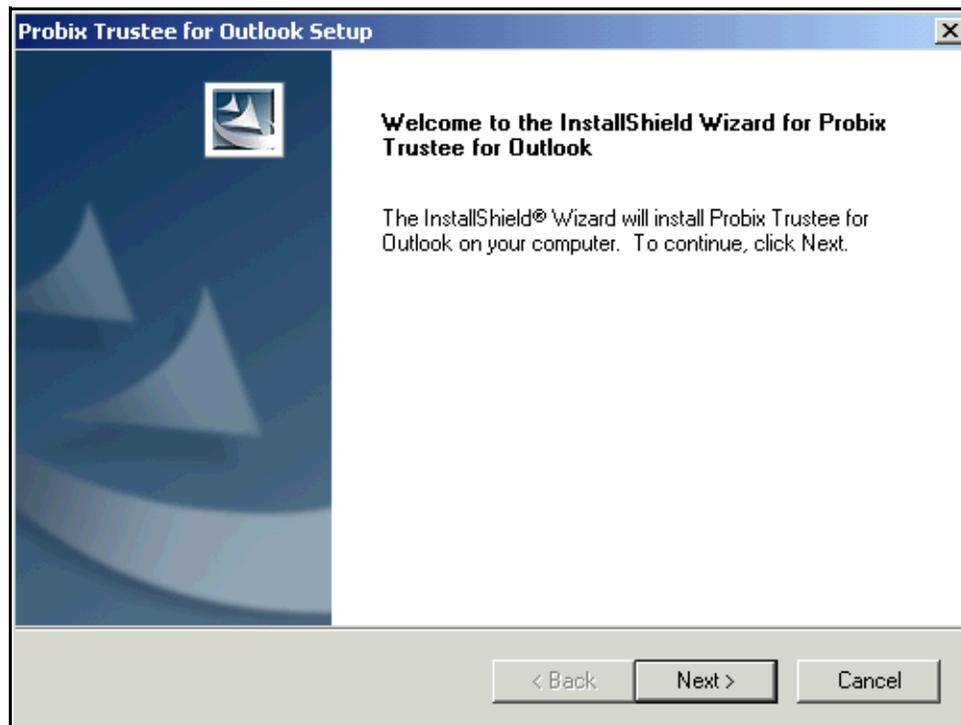
Under the **Download** menu on the left, select **PT40 Client** to start the installation. The following appears:



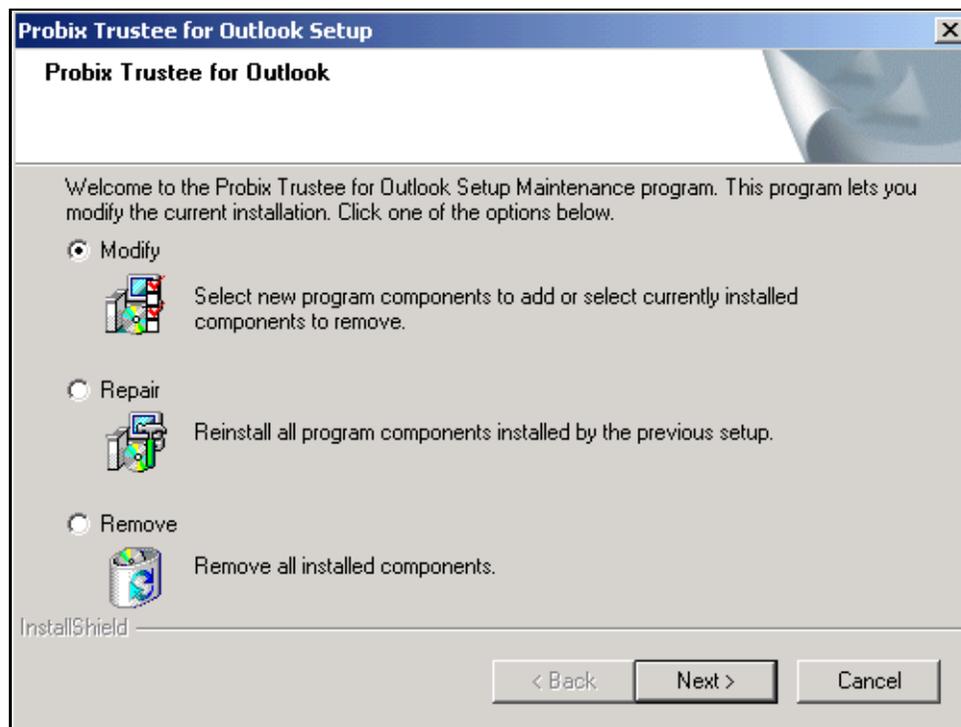
Select **Save**. Click **OK** to continue. Save the file in a known directory on your system and run it from there.

2. Start the installation program.

From wherever you saved it, run pt4o.exe. If this is your first installation, you are greeted with the following installer Welcome page.



If you are upgrading Probix Trustee for Outlook, the following Welcome page appears:



If you are upgrading Probix Trustee for Outlook, make sure either **Modify** or **Repair** is selected (they currently function identically).

Click **Next** to continue the installation.

3. Enter the Probix Trustee for Outlook server data.

Note: If you do not have this information now, you can enter it later.

Enter your account settings:

- **Server E-mail** - the e-mail address for your Probix Trustee for Outlook server.
- **Save sent messages in clear** - check to have an unencrypted copy of your Probix Trustee for Outlook message saved in the Sent folder. This message is for reference only.
- **Company name** - the name of the company owning the Probix Trustee for Outlook account (case insensitive)
- **User name** - your name.
- **User login** - your Probix Trustee for Outlook ID name.
- **Password** - your Probix Trustee for Outlook password.
- **Use alternative authentication** - check to use LDAP authentication.

Note: Probix Trustee for Outlook does *not* support Outlook Exchange.

- **Reply E-mail** - the e-mail address to which notifications are to be sent.
- **Contact Phone Number** - your telephone number.

Probix Trustee for Outlook Setup

Configuration

Enter the following information

Probix Trustee for Outlook

Enter the Probix Trustee Server e-mail address:

Server E-Mail:

Save sent messages in clear

User information

Enter your Probix Trustee account settings:

Company name:

User name:

User login:

Password:

Use alternative authentication

Reply e-mail:

Phone number:

InstallShield

< Back Next > Cancel

Enter the e-mail address for the Probix Trustee for Outlook server.

Check to have Sent messages not be encrypted.

Enter your company name as registered on the Probix Trustee for Outlook server

Enter the name of the company owning the Probix Trustee for Outlook account.

Enter the user name and password associated with the Probix Trustee for Outlook account.

Check if you want to use LDAP authentication.

Enter the e-mail address to which replies to the message sent by Probix Trustee for Outlook are to be sent.

Enter the telephone number of the person associated with the Probix Trustee for Outlook account.

Click **Next** to continue the installation.

4. Enable macros.

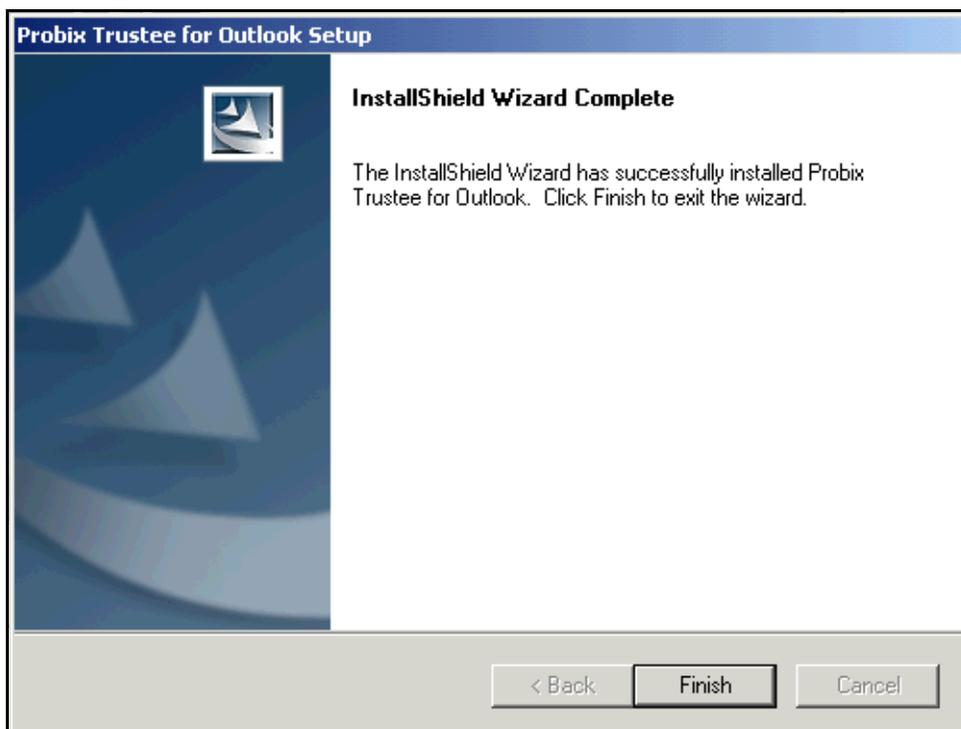
A warning message appears in a separate window asking whether you want to **Disable Macros** or **Enable Macros**.



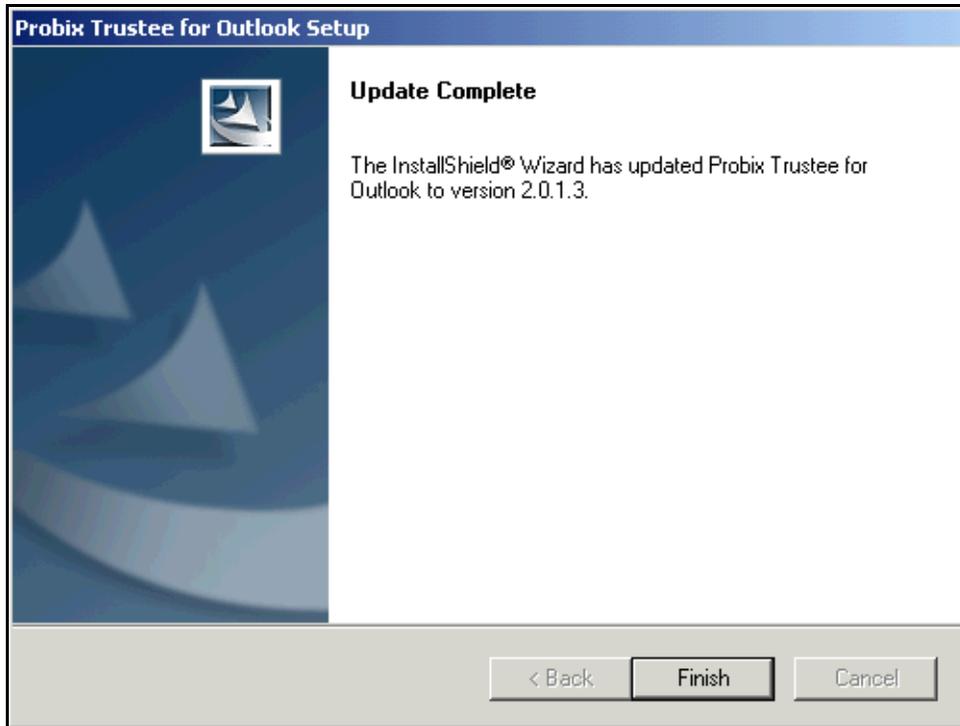
Click **Enable Macros** to be sure you do not disable any functionality in the software. This window may appear a second time; if so, click **Enable Macros** again to continue.

5. Finish running the installation program.

A confirmation window appears. If you are installing for the first time, the confirmation window is similar to this:



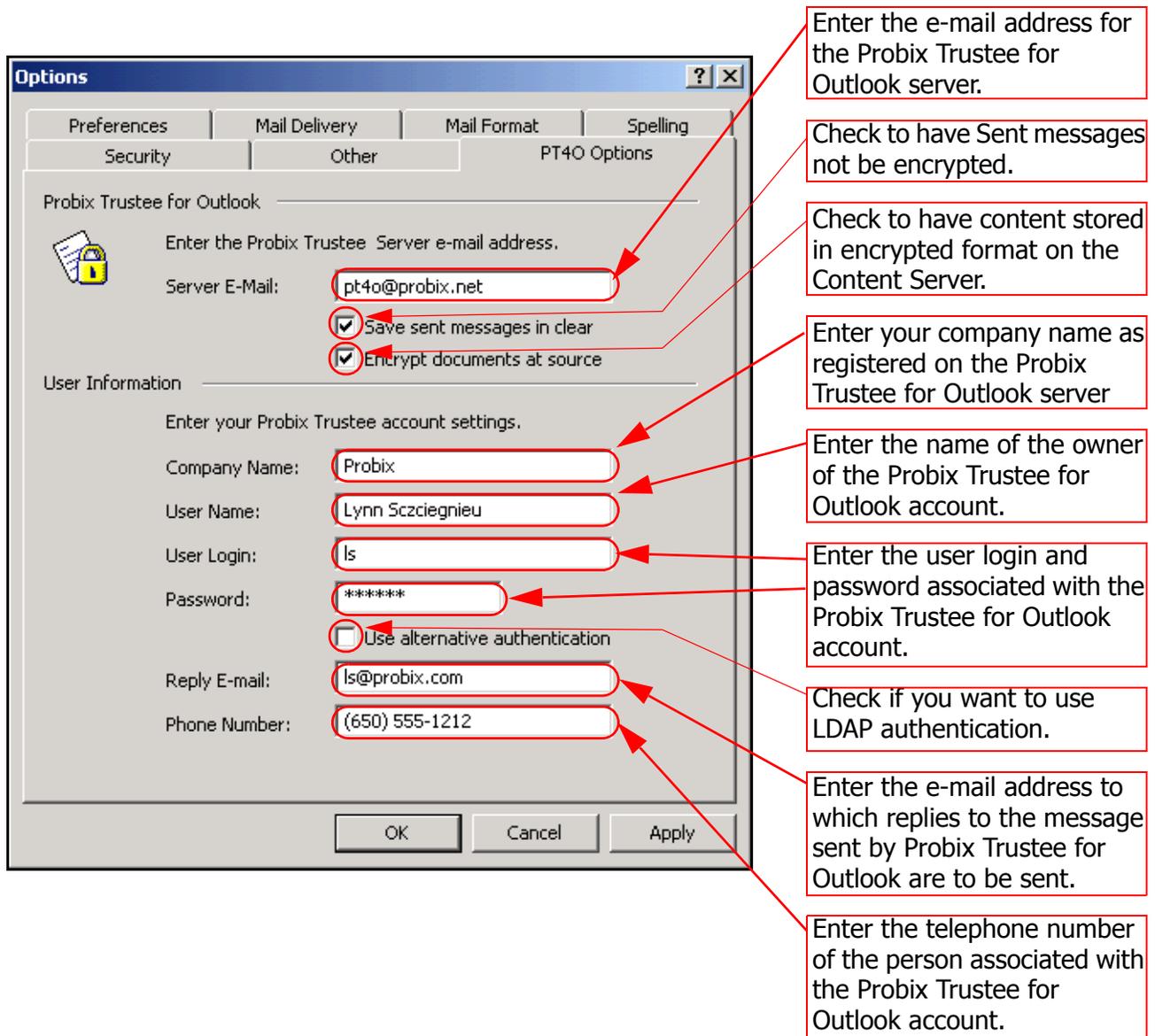
If you are upgrading Probix Trustee for Outlook, the confirmation window is similar to this:



Click **Finish** to complete the installation.

Configure MS Outlook for Probix Trustee for Outlook

To use Probix Trustee for Outlook you must configure Outlook to talk to the Probix Trustee server. In MS Outlook, from the **Tools** menu, select **Options**. Select the **PT40 Options** tab.



The screenshot shows the Outlook Options dialog box with the PT40 Options tab selected. The dialog is divided into sections: Probix Trustee for Outlook and User Information. The Probix Trustee for Outlook section includes a lock icon, a text box for the Server E-Mail address (containing 'pt4o@probix.net'), and two checked checkboxes: 'Save sent messages in clear' and 'Encrypt documents at source'. The User Information section includes text boxes for Company Name ('Probix'), User Name ('Lynn Szczegnieu'), User Login ('ls'), Password ('*****'), Reply E-mail ('ls@probix.com'), and Phone Number ('(650) 555-1212'). There is also an unchecked checkbox for 'Use alternative authentication'. Red callout boxes with arrows point to each of these fields, providing instructions on what to enter or check.

Enter the e-mail address for the Probix Trustee for Outlook server.

Check to have Sent messages not be encrypted.

Check to have content stored in encrypted format on the Content Server.

Enter your company name as registered on the Probix Trustee for Outlook server

Enter the name of the owner of the Probix Trustee for Outlook account.

Enter the user login and password associated with the Probix Trustee for Outlook account.

Check if you want to use LDAP authentication.

Enter the e-mail address to which replies to the message sent by Probix Trustee for Outlook are to be sent.

Enter the telephone number of the person associated with the Probix Trustee for Outlook account.

Enter the following:

- **Server E-Mail** - the e-mail address for the Probix Trustee for Outlook server.
- **Save sent messages in clear** - check to have an unencrypted copy of your Probix Trustee for Outlook message saved in the Sent folder. This message is for reference only.
- **Encrypt documents at source** - Check to have content stored in encrypted format on the Content Server. This keeps anyone with direct access to the Content Server from viewing your content.
- **Company Name** - the name of your company as registered on the Probix Trustee for Outlook server.

- **User Name** - the name of the person associated with the Probix Trustee for Outlook account.
- **User Login** - the user name associated with the Probix Trustee for Outlook account. If using LDAP authentication, use the LDAP login ID rather than your distinguished name.
- **Password** - the password for the Probix Trustee for Outlook account. If using LDAP authentication, use your LDAP password.
- **Use alternative authentication** - check to use LDAP authentication instead of the standard database.
- **Reply E-mail** - the e-mail address to which replies to the message sent by Probix Trustee for Outlook are to be sent.
- **Phone Number** - the phone number of the person associated with the Probix Trustee for Outlook account.

Click **OK** to save your information. Next, add the Probix Trustee for Outlook server to your e-mail configuration. In the **Tools** menu, select **Accounts**. From the **Mail** tab, click **Add** -> **Mail** to use the Internet Connection Wizard to add the Probix Trustee for Outlook server.

SENDING A PROBIX TRUSTEE FOR OUTLOOK MESSAGE

To send a message using Probix Trustee for Outlook:

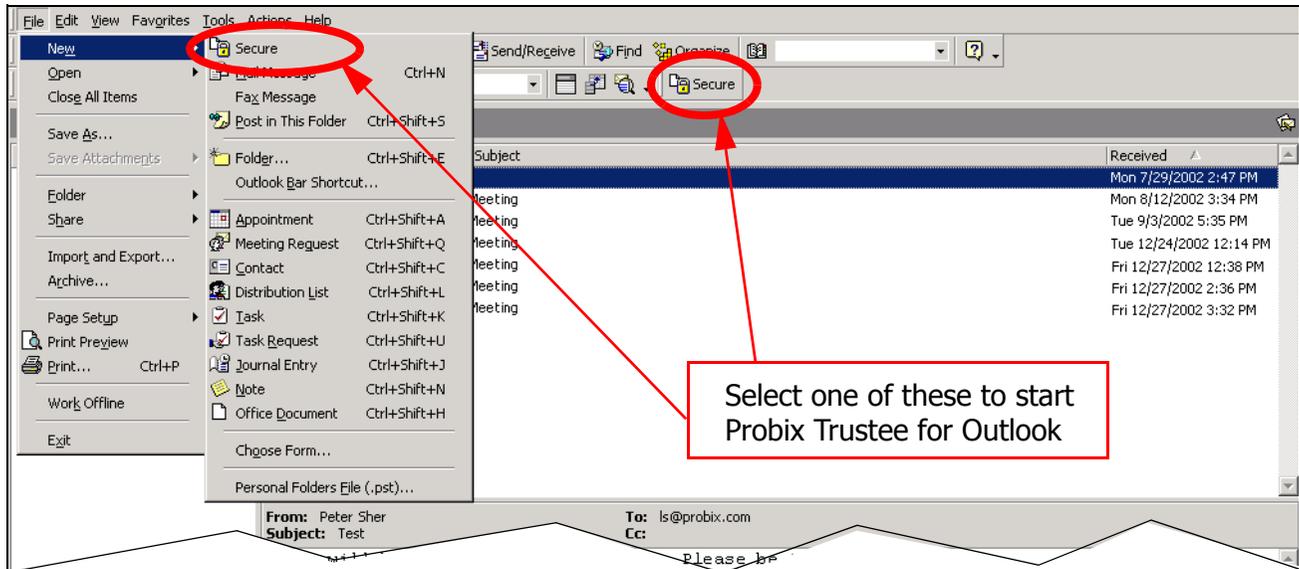
1. Create a New Probix Trustee for Outlook Message.
2. Prepare the Message.
3. Set an Expiration Date.
4. Protect the Message.
5. Apply Watermark (Optional).
6. Protect the Message Sent to Each Recipient (Optional).
7. Attach Content.
8. Send the Message.

This section explains how to accomplish these tasks.

Create a New Probix Trustee for Outlook Message

You can send a new Probix Trustee for Outlook message in one of two ways:

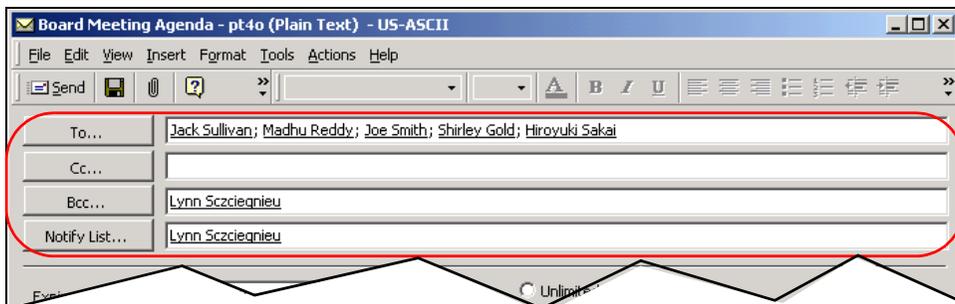
1. Click the  icon in the top of your Microsoft Outlook window.
2. From the **File** menu, select **New** then **Secure**.



The Probix Trustee for Outlook composition window appears.

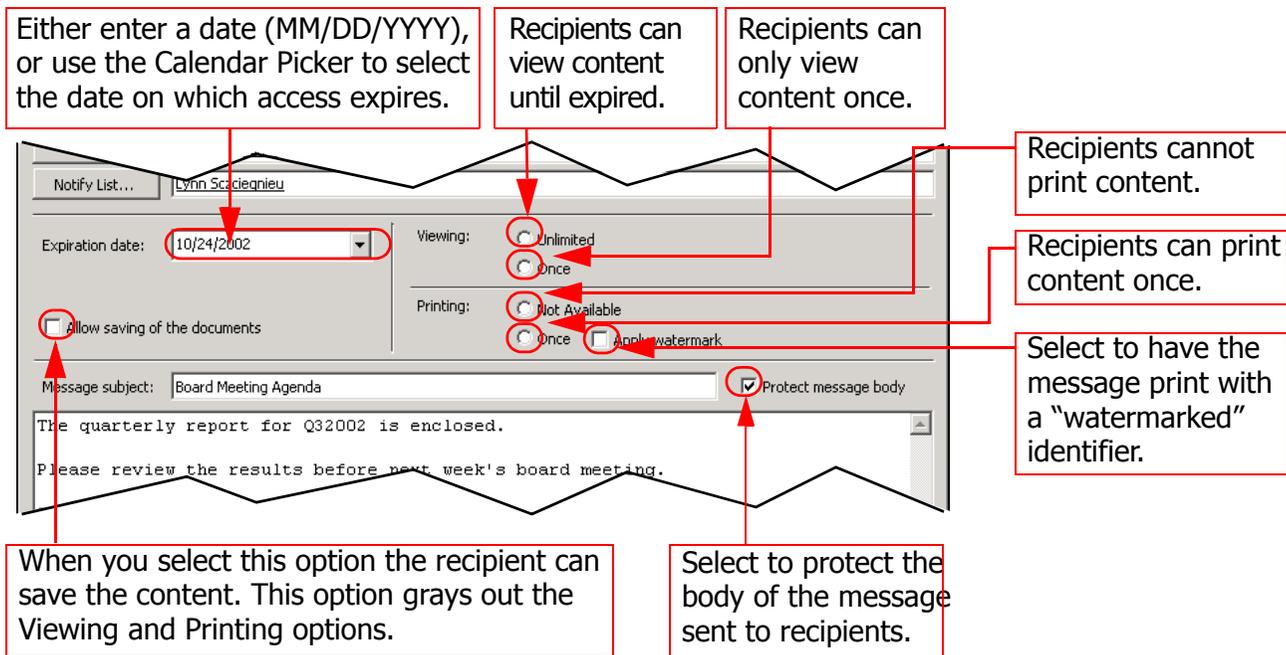
Prepare the Message

Enter recipients' names on the **To**, **Cc**, and **Bcc** lines either from your Outlook Address Book or by using Internet "@ " addresses (user@hostname.com). If you want yourself or anyone else to be notified when the content is first accessed, enter those e-mail addresses in the **Notify List** line.



Set an Expiration Date

An *expiration date* is the last date on which recipients can access protected content. Either enter a date in the Expiration Date box in the form MM/DD/YYYY, or click on the down-arrow to the right of the box to use the Calendar Picker. In the Calendar Picker, today's date is the default value and is circled in red; any date in the future you select is marked with a gray oval in the Calendar Picker. You can also choose to accept the default date selected by Probix Trustee for Outlook, which is one month from the date on which the message is entered.



Protect the Message

Set up the protection policy for the attached content. Policy options enable you to control whether each recipient must contact the sender before receiving the content, whether they can view the content more than once, and whether they can print the content.

Select from the following options:

- **Viewing:**
 - **Unlimited** - The recipient can view the document an unlimited number of times until access expires.
 - **Once** - The recipient can only view the document 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.
- **Printing:**
 - **Not available** - The recipient cannot print the document.
 - **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: Although you can grant print access to secure content, there are restrictions:

- If print access is not granted to a document, the print commands and icons are usually grayed out. When they are not grayed out and you try to print a document that has been protected against printing, a message is instead printed informing you the document is Protected by Probox.
- If **Printing: Once** access is granted to a document, the print commands and icons remain after the document has been printed, but the end user is no longer able to print the document.
- Printing overlapping ranges in programs that normally permit it is disabled. This affects printing of

PowerPoint, MS Word, HWP 2000, ASCII text, JPG, and GIF files.

- Printing of multiple copies of Acrobat (PDF) files is disabled.

All content is automatically protected so it cannot be saved by the recipients. If you select **Allow saving of the documents**, the recipient is instead allowed to save the content. The **Viewing** and **Printing** options are grayed out.

Apply Watermark (Optional)

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

To have your content watermarked when the recipient prints it, select the **Apply watermark** box in the Message bar. Note that the **Printing: Once** button is automatically selected when you select this option. 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.

Protect the Message Sent to Each Recipient (Optional)

If you are concerned about the possibility of someone other than the intended recipient reading the message body, you may want to protect the message itself.

When the **Protect message body** box in the Message bar is *not* selected, the message body appears as a normal e-mail message. Checking the **Protect message body** box causes Probix Trustee for Outlook to protect the message body by treating it as an attachment. Instead of receiving a message in the message body, the recipient receives an e-mail message with a "Message" URL that points to the message, URLs for each attachment, and the information needed to access the message and content.

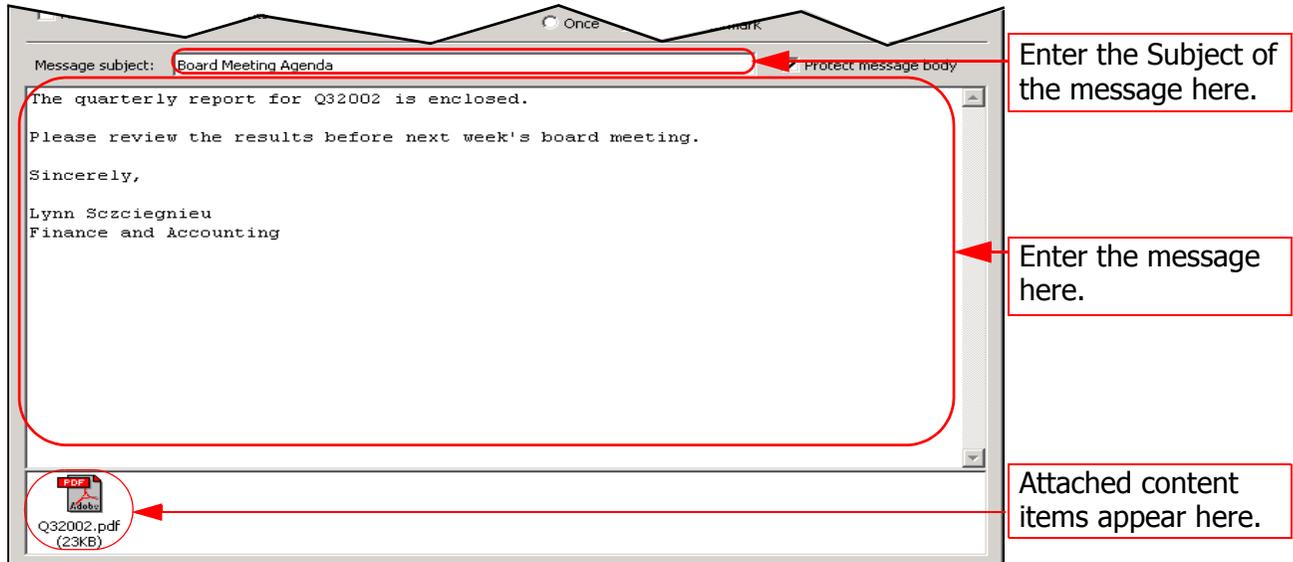
Attach Content

Use the standard Outlook attach procedure to add a content item to your Probix Trustee for Outlook message; either use the paper clip icon or by use the **Insert** menu **File** option. The attachment appears at the bottom of your message the same way a standard Outlook attachment appears.

To remove an attachment from your Probix Trustee for Outlook message, select the content item and press the **Del** key.

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** in the upper left corner of the window to send the message.

Notification recipients receive e-mail telling them when content is first accessed by each recipient.

If you do not check **Protect message body**, 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.

If you select **Protect message body**, recipients receive e-mail with an additional "Message" URL. To view the message body, they must click the URL and supply the e-mail address and password enclosed in the e-mail message.