Probix Trustee

For Outlook

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USING PROBIX TRUSTEE FOR OUTLOOK

Probix Trustee for Outlook™ is a service that enables you to share, protect and manage your confidential documents. Using a Microsoft Outlook-based interface, you can create and enforce usage policies on your e-mail content. Usage policies can be set to disable or limit printing capabilities and to enforce expirations on viewing times. This guarantees your documents are used only as intended.

To use Probix Trustee for Outlook:

1. Install the Probix Trustee for Outlook Add-In.

2. Configure MS Outlook for Probix Trustee for Outlook.

3. Enable the Probix Trustee for Outlook Add-In.

4. Create a New Probix Trustee for Outlook Message.

5. Prepare the Message.

6. Set an Expiration Date.

7. Protect the Message.

8. Enable Watermarking (Optional).

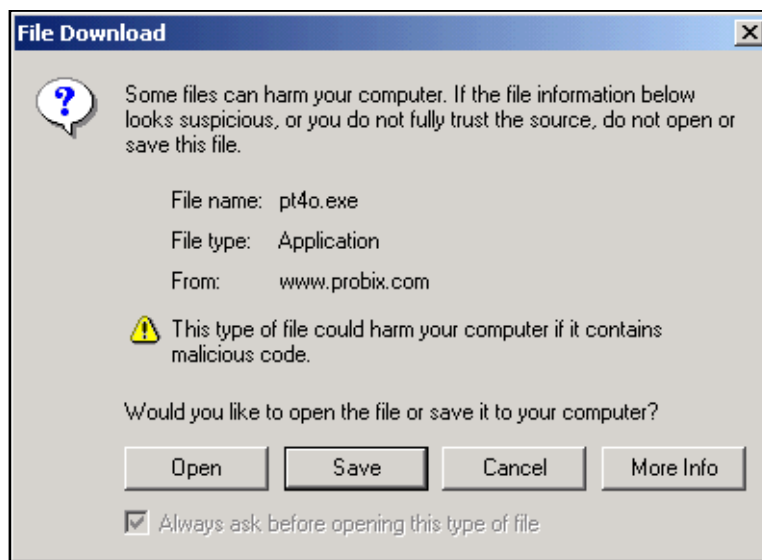9. Attach Content.

10. Send the Message.

This document explains how to accomplish these tasks.

INSTALL THE PROBIX TRUSTEE FOR OUTLOOK ADD-IN

To install the Probix Trustee for Outlook add-in:

1. **Retrieve the installation program.**

    Run http://www.probix.com/support/download/pt4o.exe 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.

Note: If you are upgrading you must either run the installation program twice (once to uninstall it, once to install it), or you must go to the **Control Panel** of your system and use the **Add/Remove Programs** menu to remove it.
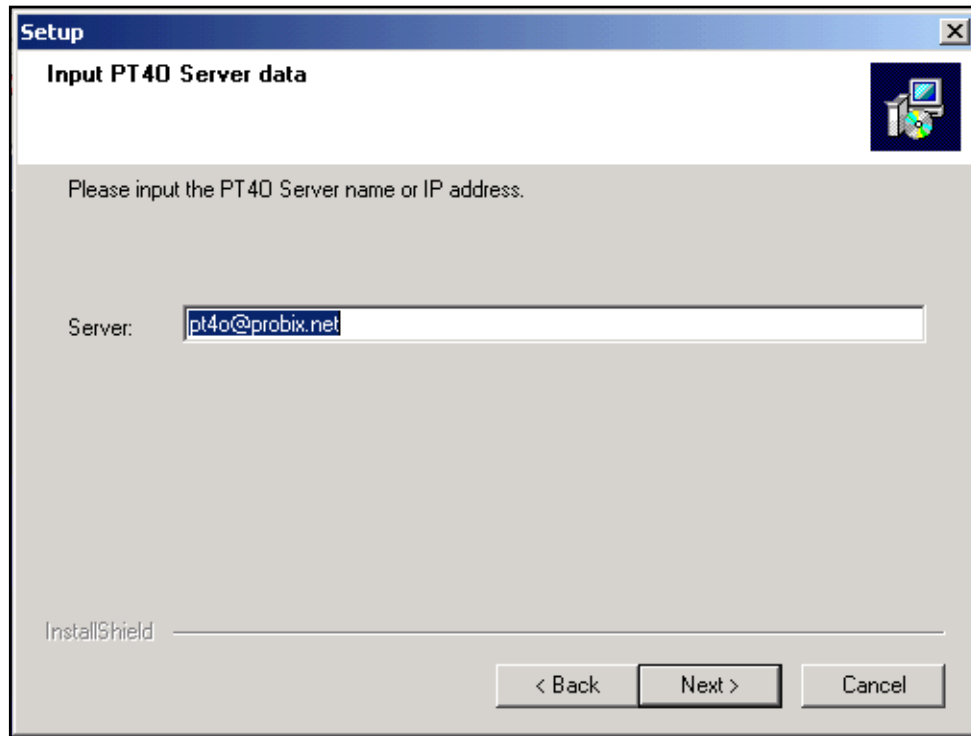
2. **Start the installation program.**

   From wherever you saved it, run `pt4o.exe`. You are greeted with the installer Welcome page.
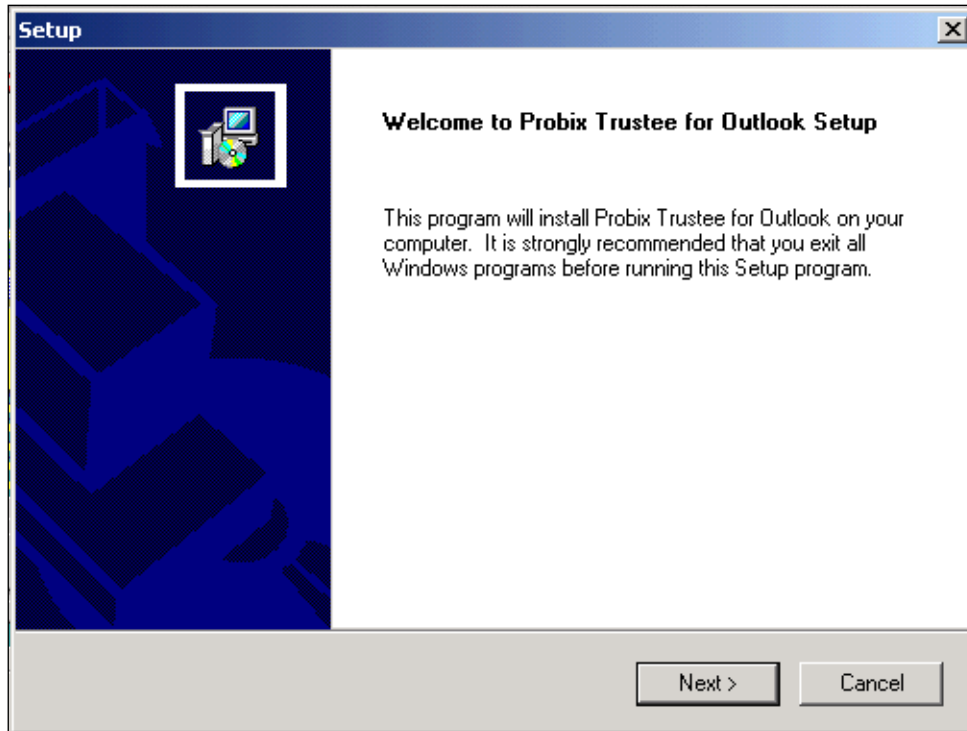
Click **Next** to continue the installation.

3. **Enter the Probix Trustee for Outlook server data.**

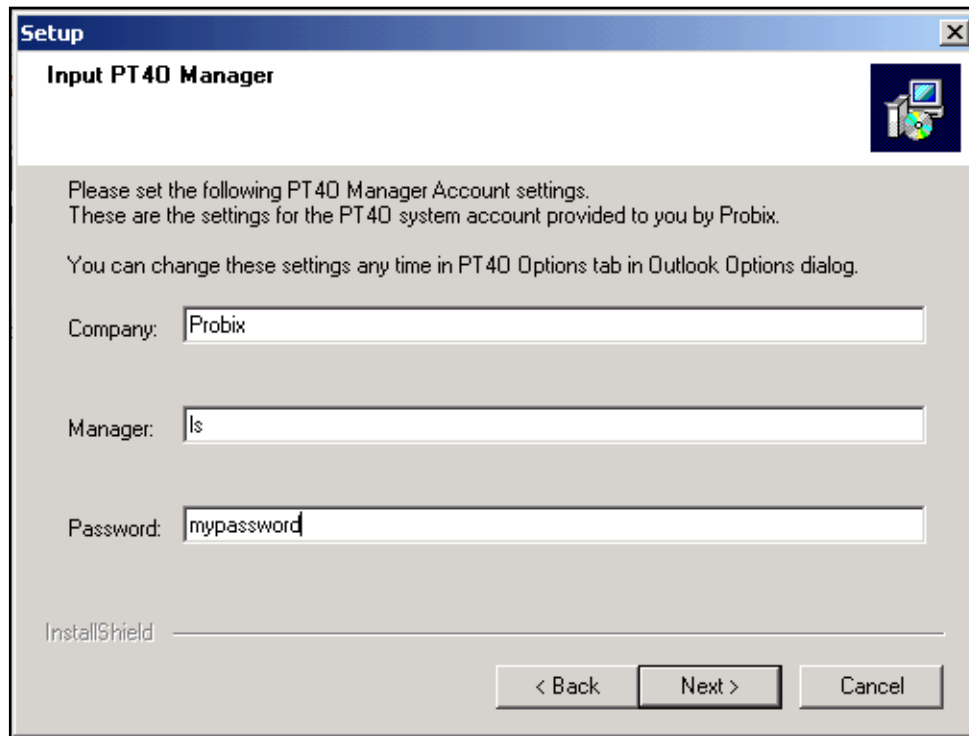   Accept the default entry of "pt4o@probix.net" as the default Probix Trustee for Outlook server.

   Click **Next** to continue the installation.

4. **Enter your account settings.**

    In the first **Input PT4O Manager** form, enter:
    °   **Company** - the name of your company (case-insensitive).
    °   **Manager** - your Probix Trustee for Outlook ID name.
    °   **Password** - your Probix Trustee for Outlook password.

    Click **Next** to continue the installation.

5. **Enter your contact information.**

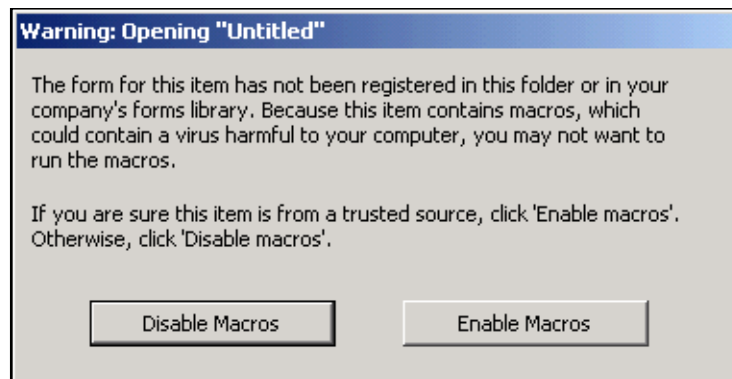   In the second **Input PT4O Manager** form, enter:

   °   **Name** - your name.

   °   **Phone** - your telephone number.

   °   **E-Mail** - the e-mail address to which notifications are to be sent.

   Click **Next** to continue the installation.
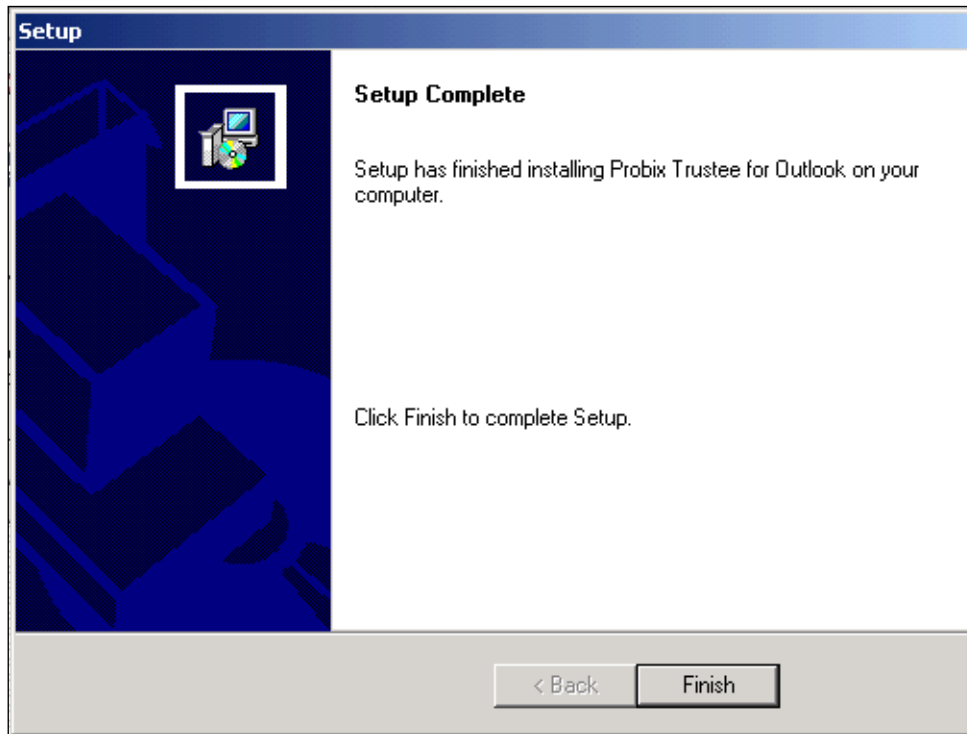
6. **Enable macros.**

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

   Click **Enable Macros** to continue. The window appears a second time; click **Enable Macros** again to continue.

7. Finish running the installation program.

A confirmation window appears.

Click **Finish** to complete the installation.

Note: You must now reboot your system for the Probix Trustee for Outlook icon to appear in MS Outlook.

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 **PT4O Options** tab.

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

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

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

Click to verify the Probix Trustee for Outlook account.

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

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.
- **Company Name** - the name of your company as registered on the Probix Trustee for Outlook server.
- **Manager Account** - the user name associated with the Probix Trustee for Outlook account.
- **Account Password** - the password for the Probix Trustee for Outlook account.
- **Manager Name** - the name of the owner of the Probix Trustee for Outlook account.
- **Reply E-mail** - the e-mail address to which replies to the message sent by Probix Trustee for Outlook are to be sent.
- **Contact 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.

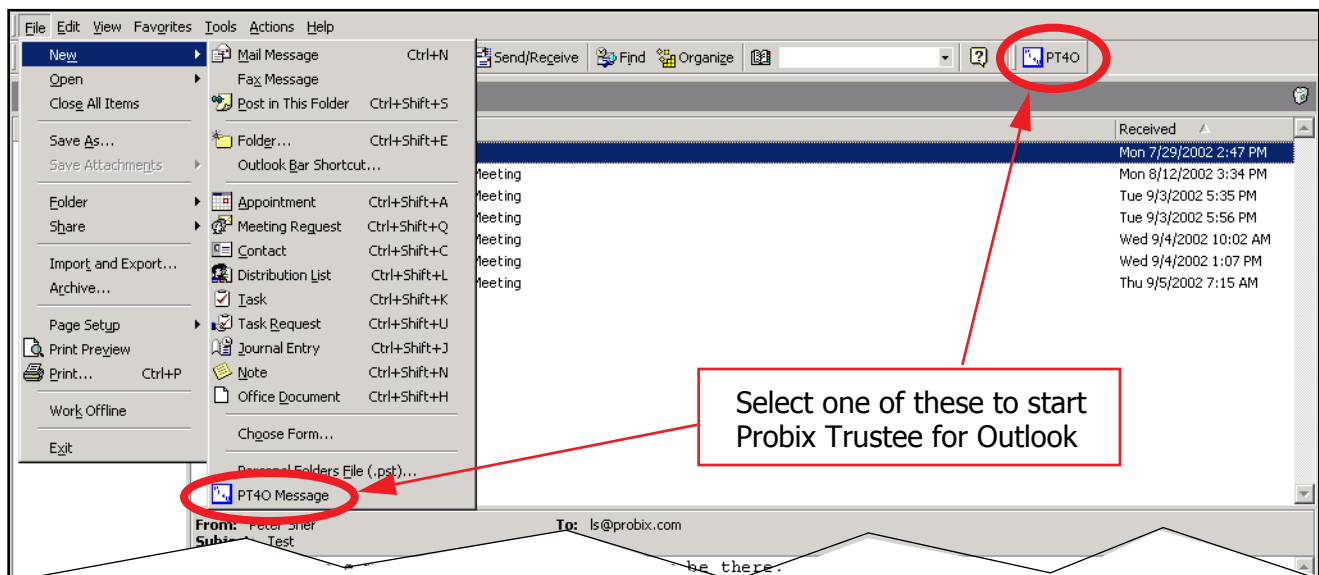## ENABLE THE PROBIX TRUSTEE FOR OUTLOOK ADD-IN

To enable or disable the PT4O add-in:

1. From the main MS Outlook window menu, in the **Tools** menu, select **Options**.

2. In the **Other** tab click the **Advanced Options...** button.

3. In the Advanced Options window, click the **COM Add-Ins...** button.

4. Checking the box to the left of **Probix Addin for Outlook** enables Probix Trustee for Outlook; unchecking it disables it.

5. Click **OK** to confirm your choice, or click **Cancel** to abort any change.

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 ⬚PT4O icon in the top of your Microsoft Outlook window.

2. From the **File** menu, select **New** then **PT4O Message**.

Select one of these to start Probix Trustee for Outlook

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.
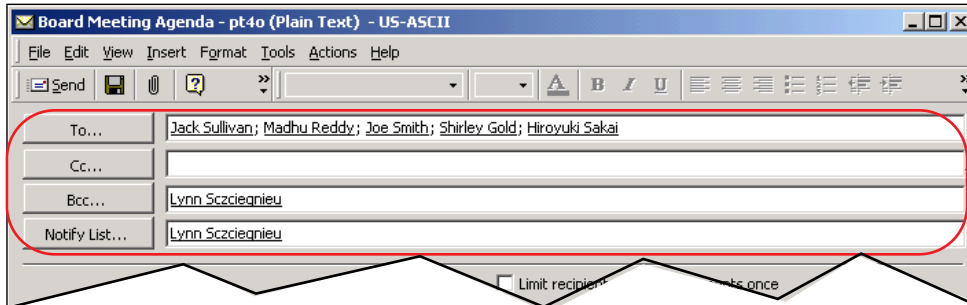
Enter names from either the Outlook Address Book or by using Internet e-mail addresses.

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.

Either enter a date (MM/DD/YYYY), or use the Calendar Picker to select the date on which access

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

Recipients can only view content once.

Recipients cannot print content unless you select this.

Select to have the message print with a "watermarked" identifier.

Select to have the password for access to content included in the message.

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

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.

You may select either or both of the following:

- **Limit recipients to view documents 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 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.

Select one of the following:

- **Send password with message**
- **Request recipients to call for password**

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

ENABLE WATERMARKING (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 **Enable watermarking** box in the Message bar. Note that the **Limit recipients to view documents once** box is automatically selected and is checked 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.

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.

Enter the Subject of the message here.

Enter the message here.

Attached content items appear here.

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.