

Outlook Personas Setup Guide

Overview

The Fall 2007 release of the CorasWorks Suite includes a set of Outlook Persona solutions. These solutions do not include the usual top and left navigation web parts, and are intended to be personalized to the current user and accessed through Microsoft Outlook.

Setup

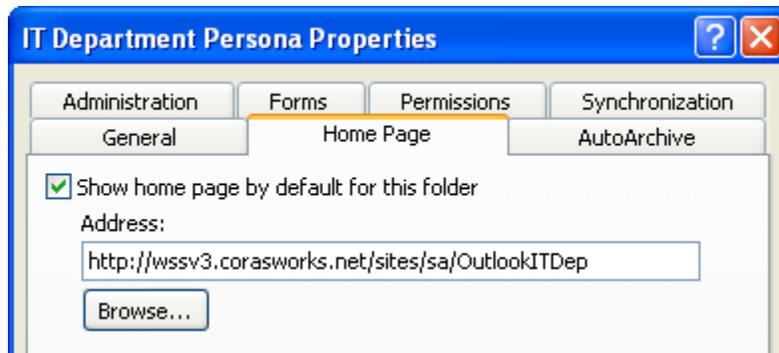
Create the site in SharePoint using the appropriate template. The site templates can be found in the Site Template Gallery or from the Create Site page under the Custom tab by looking for the template names that begin with “CorasWSC.Outlook...”

Each individual who wishes to view the site within Microsoft Outlook must perform the following steps on his or her own Outlook client.

1. Open Microsoft Outlook and select the **Mailbox** mail folder. This should be at the top level of your Outlook folders.
2. Click the **File** menu and select **New | Folder**. A Create New Folder window is displayed as shown here.



3. Give the new folder a name appropriate to the SharePoint solution site it will reference. Leave the default value in the “Folder contains:” setting.
4. Click **OK**.
5. Right click the new folder in the folder list and select **Properties**.
6. Click the **Home Page** tab in the Properties window, shown below.

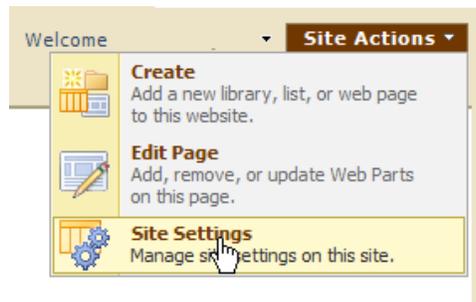


7. In the **Address:** box, paste the URL for the Outlook Persona SharePoint site.
8. Select the **Show a homepage by default for this folder** checkbox.
9. Click **OK**.

Navigating in an Outlook Persona Site

Because an Outlook Persona template does not display the left or top navigation that is typical in other SharePoint sites, alternative navigation must be used.

To access lists and libraries directly, use the **Site Actions** drop-down in the upper right corner of the page. Click **Site Settings**, as shown below.



From the Site Settings page, on the right side of the screen under **Site Administration**, click **Site libraries and lists**.

Site Administration

- Regional settings
- Site libraries and lists
- ...

From here, you can modify list and library settings or continue navigating to the various views of the list data.