## **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.

Create New Folder	?×
Name:	
IT Department Persona	
Folder contains:	
Mail and Post Items	~
Select where to place the folder:	
표 鏠 Mailbox -	

- 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.

IT Department Pe	rsona Prop	oerties	? 🛛
Administration	Forms	Permissions	Synchronization
Show home page	by default fo	or this folder	AutoArchive
Address:			
http://wssv3.co	orasworks.nel	t/sites/sa/Outloo	kITDep
Browse			

- 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.

We	lcome	• Site Actions •
	<u>ж</u>	Create Add a new library, list, or web page to this website.
		Edit Page Add, remove, or update Web Parts on this page.
		Site Settings Manage skill pettings on this site.

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.