

About Integration

In this guide, you'll find general information about how Outlook 2007 and SharePoint Server 2007 work together. These products offer the ability to use Outlook 2007 to view and edit SharePoint Server 2007 collaboration resources.

Outlook 2007 and SharePoint Server 2007 Together

In SharePoint Server 2007, you can create resources for team collaboration and then connect them to Outlook 2007 so that team members can collaborate with them there.

Because of this connectivity, you can stay in the familiar environment of Outlook 2007 and work directly on SharePoint Server 2007 resources. You can even work on the resources offline, because your changes will be synchronized when you go online. This way, you can work no matter what your connection status is.

SharePoint Server 2007 resources refers to the SharePoint Server 2007 tools designed to assist in group collaboration. These resources are usually lists, such as contact lists and task lists, but they can also be calendars, or documents in progress.

There are five types of resources that can be used in Outlook 2007:

- Calendar
- Task List
- Document Library
- Discussion Board
- Contact List

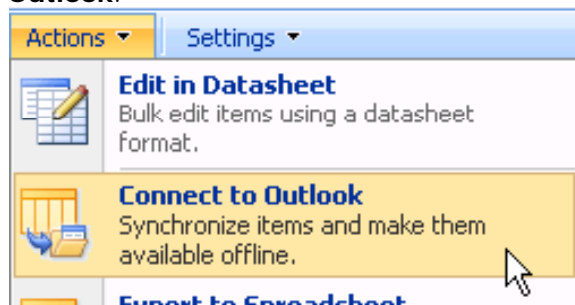
See the following table for descriptions of these resources.

| Resource | Description |
|------------------|---|
| Calendar | Use calendars to schedule projects, appointments, and milestones. A SharePoint Server 2007 calendar can be viewed side-by-side with an Outlook 2007 calendar, or the two calendars can be overlaid to view all items at once. You can drag an item to your Outlook 2007 personal calendar to see it on a mobile device. |
| Task List | Use task lists to assign project duties and track them to conclusion. Team members can see all project tasks in the Tasks window, or can view tasks assigned only to them in the To-Do Bar. |
| Document Library | Team members use document libraries to preview, search, and open project documents. Site members can edit documents locally or offline. Office reminds members to update the SharePoint server with changes, as necessary. |
| Discussion Board | Use Discussion Boards to discuss specific topics during the course of a project. While e-mail discussions require participants to find and sort many messages, Discussion Boards isolate messages for easy tracking. |
| Contact List | Use Contact Lists to stay in touch with other team members and with important people outside the team. And as one member adds contacts to a list or edits it, the entire team gets the new information. |

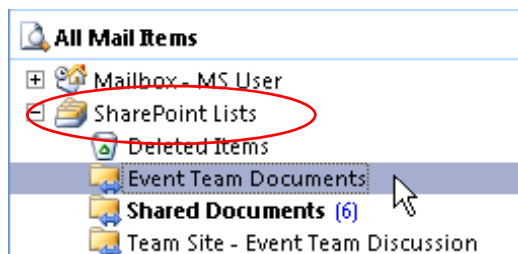
Consider what resources your project needs and then add them to your SharePoint Server 2007 site. After you connect them to your own Outlook 2007 mailbox, you can share them with others.

Connecting Outlook 2007 and SharePoint Server 2007

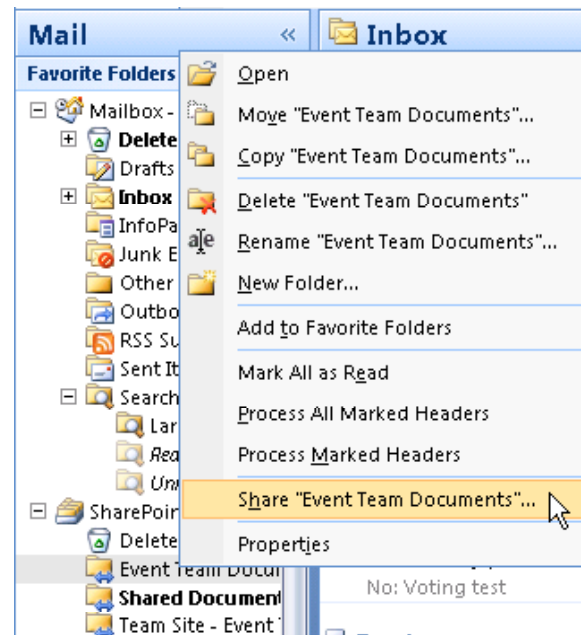
It's easy to connect resources to Outlook 2007 and then share the connection with others. After creating a resource on a site—for example, a task list or a calendar—go to the resource and, on the **Actions** menu, click **Connect to Outlook**.



When the connection is made, the resources appear as folders in your Outlook 2007 mailbox. The folders are listed in the **Mail** pane under **SharePoint Lists**. SharePoint calendars do not appear as folders. Instead, they appear with other calendars in the **Calendar** pane.



To share your connection with others, go to a SharePoint Server 2007 folder in the **Mail** pane, right-click the folder, and then click **Share [resource name]**. In the message window that appears, send invitations to share the resources.



To accept an invitation and connect to the same resources in Outlook 2007, invitees click a button in the message.

After connecting to the resources, invitees can begin collaborating with the resources in Outlook 2007.

Online and Offline

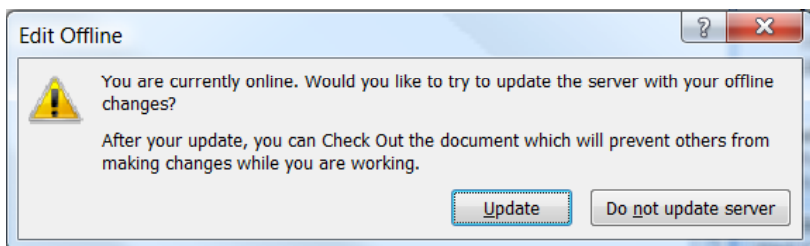
To get the greatest benefit from working in Outlook 2007 and SharePoint Server 2007, it helps to understand the difference between the online and offline synchronization experiences.

| | |
|-----------------------------|--|
| When you are online | Edits made in Outlook 2007 to resources are automatically synchronized with the master files on the SharePoint Server 2007 site. These changes are synchronized with those made by others who share the connection in Outlook 2007. |
| When you are offline | You can view and edit cached versions of resources, but your edits are not synchronized with the master files on the SharePoint Server 2007 site, and not synchronized with those made by others until you go online. Go online periodically to trigger synchronization. |

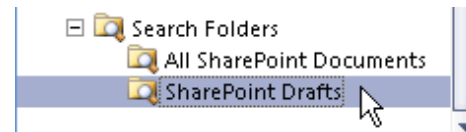
Tip To prevent the loss of information when more than one person is working on a document at the same time, turn on version control at the SharePoint Server 2007 site, or check out the document before you begin working on it.

Notes

- When editing documents, you must first make a local copy of the document, edit it offline, and then manually synchronize your changes with the SharePoint site. You will be prompted to do so.



- Documents you have edited but not yet updated can be found inside your **SharePoint Drafts** Search Folder.



About Multiple Calendars

Microsoft® Office Outlook® 2007 enables you to manage your time by separating your personal and business calendars, and allowing you to view them at one time. For example, you may find it useful to separate your personal appointments from business appointments by creating two different calendars. Also, if you schedule projects or team events in the calendar on a Microsoft® SharePoint Server 2007 site, you can connect this calendar to Outlook 2007.

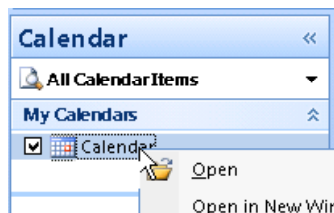
With Outlook 2007, using multiple calendars is efficient—you can view and use the calendars individually or together.

Topics in this guide include:

- Create Additional Calendars
- Connect to SharePoint Server 2007 Calendars in Outlook 2007
- View Multiple Calendars
- Move Appointments between Calendars

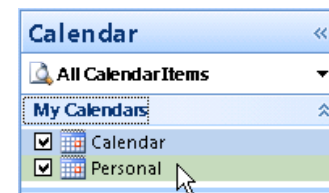
Create Additional Calendars

- 1 In the Outlook 2007 navigation pane, click **Calendar**.
- 2 Under **My Calendars**, right-click **Calendar**, and then click **New Folder**.



- 3 In the **Name** box, type a name for the new calendar, and then click **OK**.

The calendar name and a check box appear under **My Calendars**. Repeat this process to create additional calendars.



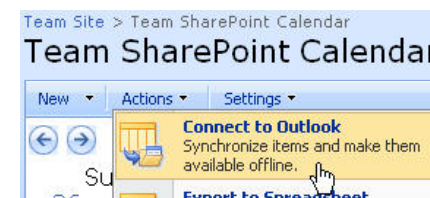
Connect to SharePoint Server 2007 Calendars in Outlook 2007

View and use calendars from both programs in Outlook 2007. For example, if your team uses a calendar on a Team Site to track vacations, you may want to view this calendar in Outlook 2007 when scheduling team meetings or events.

View and work with the calendar from either Outlook 2007 or from the SharePoint Server 2007 site. Because the two calendars are linked, any changes you make are saved in both calendars.

Important A calendar on a SharePoint Server 2007 site is required to complete this procedure.

- 1 Navigate to a calendar on a SharePoint Server 2007 site.
- 2 Click **Actions**, and then click **Connect to Outlook**. In the **Microsoft Office Outlook** dialog box, click **Yes**. The calendar from the site will appear next to your other calendars in Outlook 2007.



View Multiple Calendars

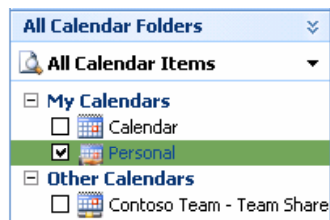
There are three ways to view your calendars: one at a time, side by side, or overlaid on top of each other. Whichever view you use, you can move calendar items between the calendars and create or delete items on the calendars.

One-at-a-Time View

After adding additional calendars, there may be times when you want to view just one of the calendars.

1 In the Outlook 2007 navigation pane, click **Calendar**.

2 Under **My Calendars**, clear all the check boxes *except* the one next to the calendar you want to view.

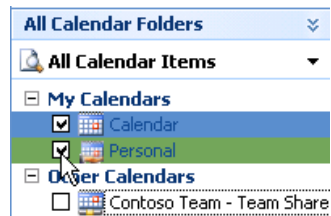


Side-by-Side View

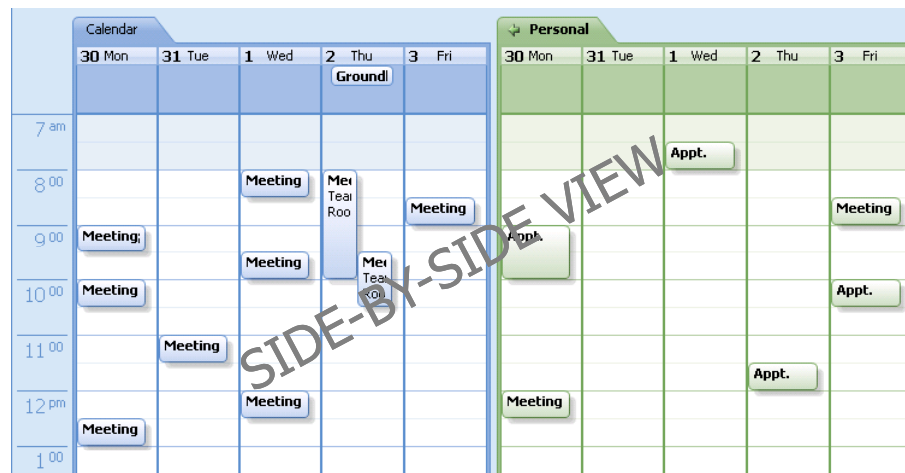
Side-by-side viewing is ideal for moving appointments between calendars.

1 In the Outlook 2007 navigation pane, click **Calendar**.

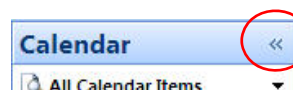
2 Under **My Calendars**, select the check box next to each calendar you want to view.



As you select calendars, they appear side-by-side in the main window. To close a calendar, clear its check box.



Tip To create more viewing room on your screen, collapse the left navigation pane or the To-Do Bar. To collapse one of these, go to the top of the left navigation pane or the top of the To-Do Bar, and then click the arrow. To expand the pane, click the arrow again.



Navigation Pane




To-Do Bar

Overlay View

Overlay view is ideal for identifying scheduling conflicts. By using a transparent overlay with color-coded calendar items, overlay view allows you to see all your meetings as if they are on one calendar.

- 1 In the Office Outlook navigation pane, click **Calendar**.
- 2 Under **My Calendars**, select the check box next to each calendar you want to overlay. The calendars appear side-by-side.


- 3 On the tab of any calendar you want to overlay, click the arrow. As you click the tab arrows of various calendars, the calendars overlay across each other.



Tips

- To bring a calendar to the front, click the calendar tab or an appointment.
- To move a calendar back to side-by-side view, click the tab arrow.

Move Appointments between Calendars

Moving appointments keeps them attached to specific calendars, and prevents others from seeing personal items. For example, if you move personal appointments to secondary calendars they cannot be shared with others because only your main (default) calendar or calendars from SharePoint Server 2007 sites can be shared.

1 Open two or more calendars in side-by-side view.

2 To move or copy appointments, do one of the following:

To move an appointment, right-click it, click **Cut**, and then paste it on the other calendar.

–OR–

To copy an appointment, right-click it, click **Copy**, and then paste it on the other calendar.

Note Single occurrences of an appointment series cannot be moved to another calendar; however, you can copy a single occurrence. To move an entire appointment series, you must move the first meeting in the series.

Delete a Calendar

If you no longer need a calendar, remove it.

1 Under **My Calendars**, right-click the name of the calendar you want to remove.

Note Your main calendar cannot be removed.

2 Click **Delete [calendar name]**.

Restore a Calendar

The way you restore a calendar depends on where the calendar was created.

Restore a Calendar Created in Outlook 2007

1 From the **Go** menu, click **Folder List**. In the **Folder List**, expand the **Deleted Items** folder.

2 Drag the calendar from the **Deleted Items** folder to the **Calendar** folder.

Note If the calendar no longer exists in the **Deleted Items** folder, it is permanently deleted and cannot be restored.

Restore a SharePoint Server 2007 Calendar

If you mistakenly remove a SharePoint Server 2007 calendar from Outlook 2007, restore it by going to the site and reconnecting the calendar. For details, see the "Connect to SharePoint Calendars in Outlook" topic earlier in this guide.

Add a Second Time Zone to a Calendar

If you work with people in other geographic locations, adding a second time zone to your calendar can help you manage the time differences.

- 1 On the **Tools** menu, click **Options**.
- 2 Under **Calendar**, click **Calendar Options**.
- 3 Under **Advanced options**, click **Time Zone**.
- 4 Select the **Show an additional time zone** check box.
- 5 In the **Label** box, type a description, such as "Tokyo."
- 6 In the **Time zone** list, click the time zone, and then click **OK**. The second time zone appears next to your default time zone.

Tip When you enter the area with a different time zone, you can use the secondary time zone as your main calendar time by going into **Tools>Options>Calendar Options>Time Zone**. In the **Time Zone** dialog box, click **Swap Time Zones**. This syncs all your calendar items with the new time zone. To switch back, click **Swap Time Zones** again.

About Microsoft Office Tasks

Tasks in the Microsoft Office system are similar to a to-do list. Tasks make it easy to use Microsoft® Office Outlook® 2007 to organize your time and your work. Tasks are integrated across Outlook 2007, Microsoft® Office SharePoint® Server 2007, and Microsoft® Office OneNote® 2007—enabling you to smoothly work between applications.

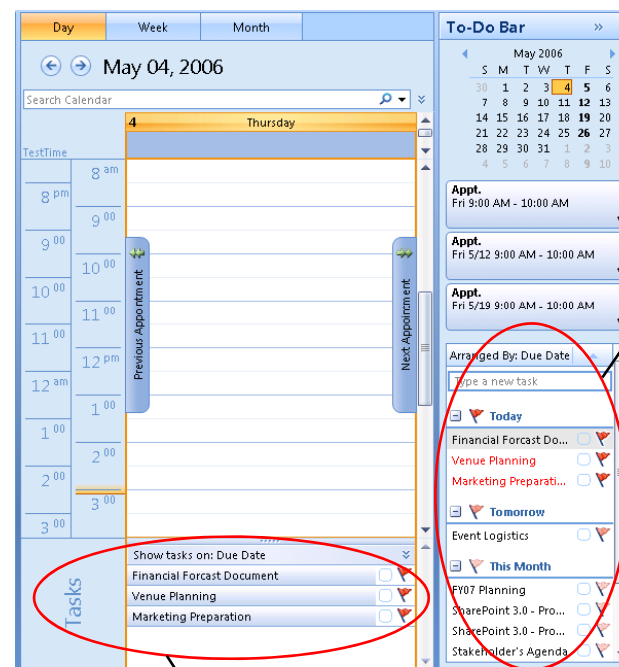
Topics in this guide include:

- About the To-Do Bar in Outlook 2007
- Create a Task in Outlook 2007
- Flag Incoming E-Mail Messages for Follow-Up
- Attach Files and E-Mail Messages to a Task
- Use Outlook 2007 to Work with SharePoint Server 2007 Tasks
- Create an Outlook 2007 Task from Microsoft® Office OneNote® 2007

About the To-Do Bar in Outlook 2007

The To-Do Bar includes calendar and task information. Tasks include regular tasks in the task folder and e-mail messages flagged for follow up.

Most of the procedures in this guide use the To-Do Bar. If the To-Do Bar is not displayed on your screen, go to the **View** menu, point to **To-Do Bar**, and then click **Normal**.



To-Do Bar Task List
Includes flagged e-mail messages, tasks, and downloaded SharePoint Server 2007 tasks.

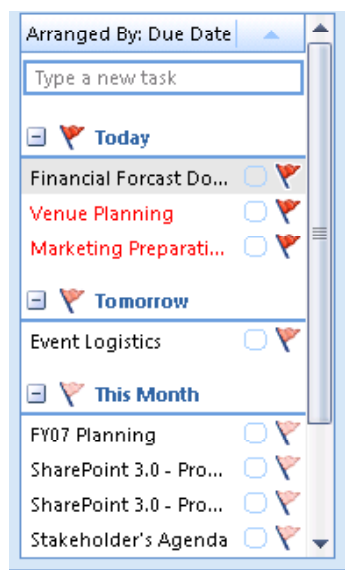
Daily Task List Displayed in Calendar

Completed tasks stay on the day of completion in your calendar and are recorded as work performed on that day. Tasks not completed move on to the next day until they are completed.

Create a Task In Outlook 2007

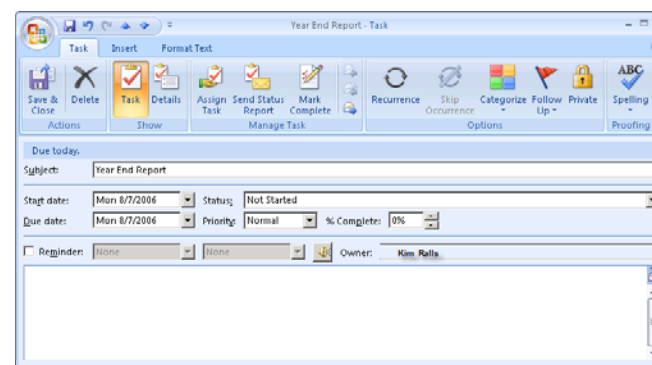
- 1 On the **To-Do Bar**, in the **Type a new task** box, type the name of the new task, and then press ENTER to complete creating your task.

The task appears in the To-Do Bar Task List with a default due date of the current date.



Note If the **Type a new task** box does not appear, on the To-Do Bar Task List, right-click the **Arrange By** bar, click **Custom**, and then click **Reset Current View**. Click **OK**.

- 2 To add a specific start date, due date, reminder, or any additional information, double-click the task in the To-Do Bar Task List. Make changes in the task window, and then click **Save & Close**.

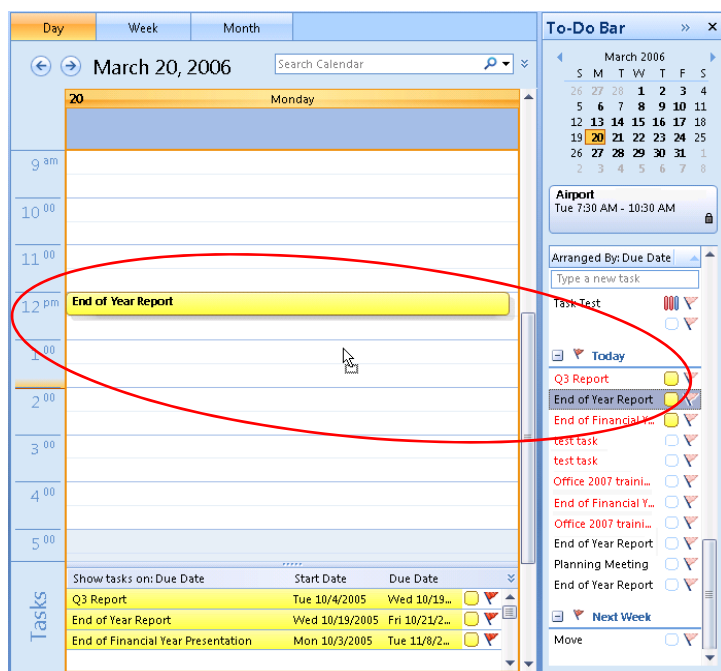


Tip To create a task from an Outlook 2007 item, drag the item (such as an e-mail message, contact, or calendar event) onto the Task List in the To-Do Bar.

Schedule Time for an Outlook 2007 Task

Schedule time in your Outlook 2007 Calendar to work on a task, or schedule a meeting to talk about a task.

- 1 On the Outlook navigation pane, click **Calendar**.
- 2 Drag the task you want to schedule time for from the To-Do Bar Task List to the **Calendar**.

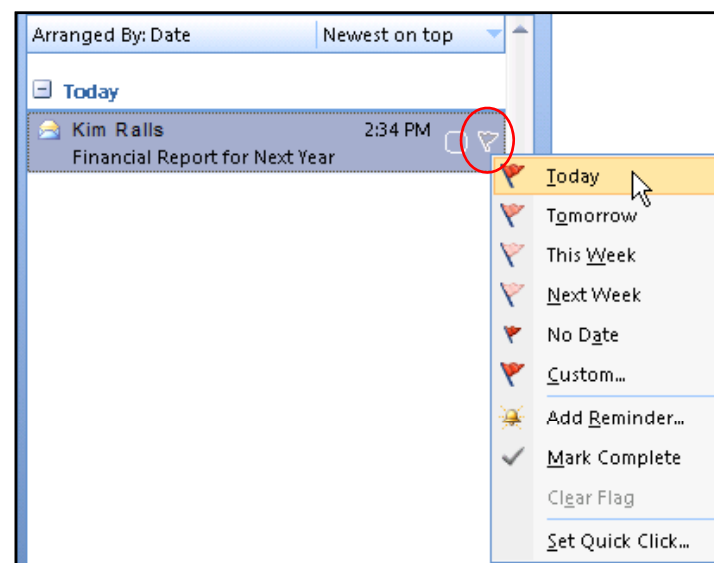


- 3 Double-click the calendar appointment you created. On the **Appointment** tab, select the options you want, and then click **Save & Close**.

Flag Incoming E-Mail Messages for Follow-Up

Use flags to add an incoming e-mail message to the Tasks list. When you flag an e-mail message, it appears in the Daily Tasks List in the Calendar and in the To-Do Bar Task List.

- 1 Right-click the flag icon on an unopened e-mail message.
- 2 Click the flag with the preferred due date. To choose specific start dates and due dates, click **Custom**.



Tips

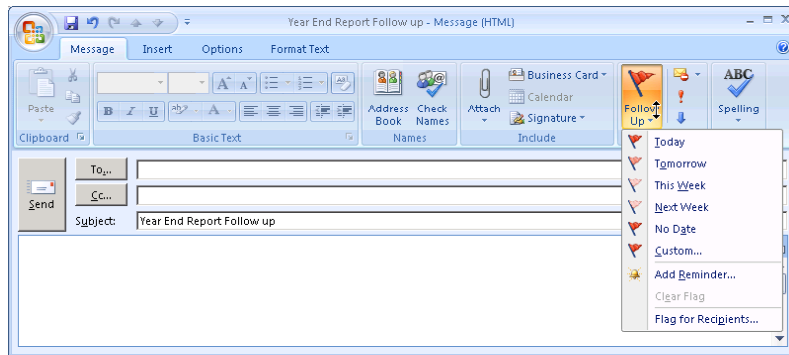
- To apply the default flag (Today), click the flag icon on the e-mail message. To mark the task complete, click the flag again and a check mark appears.
- To change the default flag, click the flag icon on the e-mail message, and then click **Set Quick Click**.

Flag Outgoing E-Mail Messages as a Reminder

To remind yourself to follow up on e-mail messages you're sending, add flags when you send e-mail messages.

Note When you flag e-mail messages, the flags are only viewable by you—unless you specifically set a flag for the recipients as well.

- 1 Create a new e-mail message.
- 2 On the Ribbon, on the **Message** tab, click **Follow Up**, and then click the time on which you want to follow up.



Notes

- If you want to also set a flag for the recipients, click **Follow Up**, and then click **Flag for Recipients**.
- To set a specific date for follow up, click **Custom**, and then click a date that you want.

Attach Files and E-Mail Messages to a Task

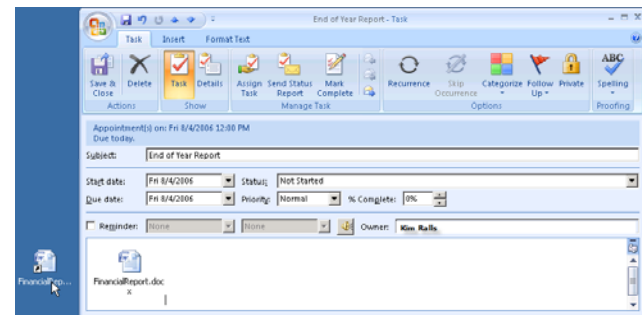
Attach related files and e-mail messages to a task—task-related content is conveniently located in one place.

- 1 Open a task.

Note This procedure will not work with flagged e-mail messages. To make sure you actually opened a task, the window must be labeled with “[Task Name] - Task” at the top and include a **Task** tab.

- 2 Select the file or e-mail message, and then drag it into the **Task** window.

Tip You may need to resize your windows to drag items into the **Task** window.



- 3 Click **Save & Close**.

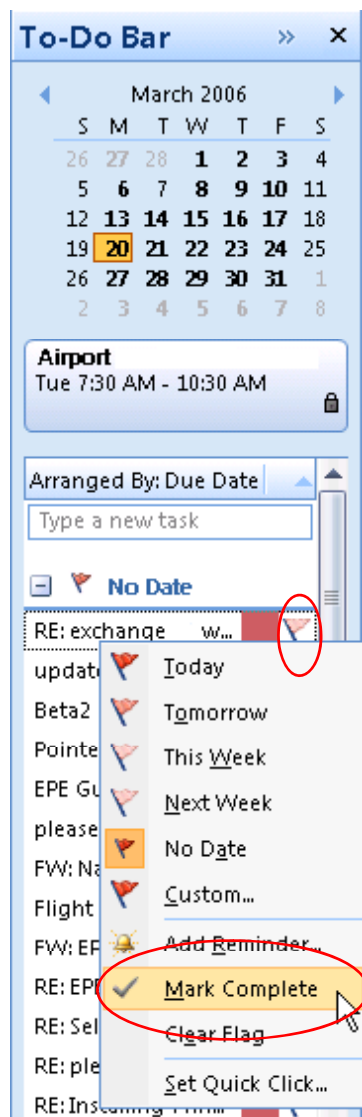
Mark a Task Complete

- On the To-Do Bar Task List, right-click the flag to the right of the task, and then click **Mark Complete**.

The task no longer appears in the To-Do Bar Task list and appears as complete in the tasks **To-Do List**.

Tips

- To mark a task complete, right-click on the task and then click **Mark Complete**. Or in the Outlook navigation pane, click **Tasks**, and then select the check box to the left of the task.
- To delete a task, click **Tasks** in the Outlook navigation pane, right-click the task, and then click **Delete**.



Use Outlook 2007 to Work with SharePoint Server 2007 Tasks

With Outlook 2007, you can now view and change tasks that exist on your Team Site. Any changes that you make to tasks in Outlook 2007 are automatically synchronized with SharePoint Server 2007.

To use Outlook 2007 to view and edit SharePoint Server 2007 tasks, you must connect Outlook 2007 to the SharePoint Server 2007 Task list. After you do, the SharePoint Server 2007 tasks appear in your Outlook 2007 Tasks list.

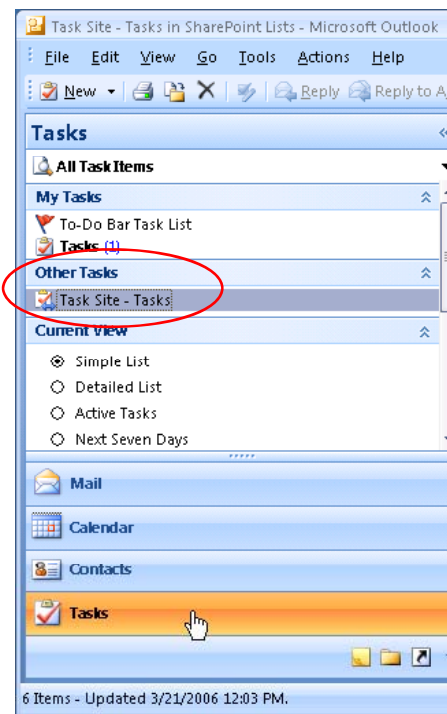
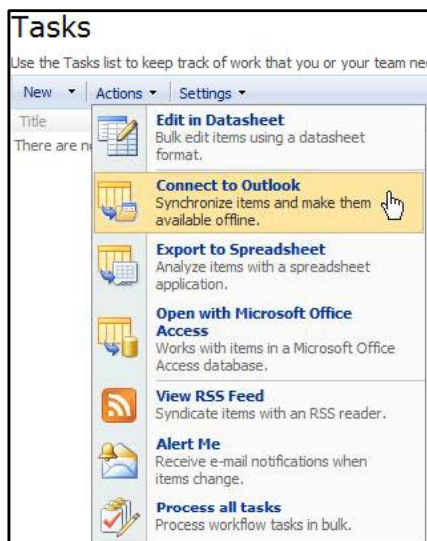
Note Working with SharePoint Server 2007 tasks in Outlook 2007 requires a SharePoint Server 2007 site.

Connect Outlook 2007 to a SharePoint Server 2007 Task List

- 1 On a Team Site or My Site, in the left navigation pane under **Lists**, click **Tasks**.
- 2 On the menu bar, click **Actions**, and then click **Connect to Outlook**. In the **Microsoft Office Outlook** dialog box, click **Yes**.

All tasks are now added to your Outlook 2007 Tasks List. Only the tasks assigned to you are displayed in the To-Do Bar task list and the Daily Task List.

Repeat the procedure above for each SharePoint Server 2007 Task List you want to connect to Outlook 2007.



Outlook Tasks List

Notes

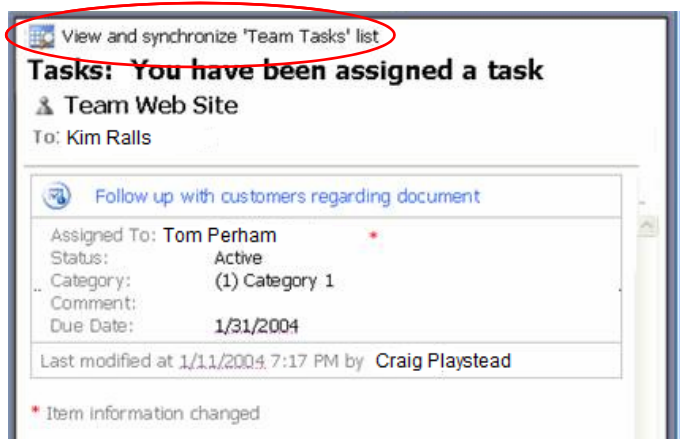
- If you receive a task e-mail message from a SharePoint 2007 site, you can automatically connect Outlook 2007 to a SharePoint 2007 Task list. See the next topic, "Respond to a Task E-Mail Message from a SharePoint Server 2007 Site."
- As with any SharePoint Server 2007 site, you need the proper permissions to view, edit, add, and delete items. If you do not have the correct permissions to the SharePoint Server 2007 task list, you need to request access from the site administrator.

Respond to a Task E-Mail Message from a SharePoint Site

When you receive a task e-mail message from a SharePoint Server 2007 site in your inbox, you can add the task to your Outlook 2007 task list. When you add the task, Outlook 2007 automatically creates a connection to the SharePoint 2007 Task List. All the tasks in the SharePoint 2007 Task List will be displayed and synchronized in your Outlook 2007 Task List.

Only the tasks assigned to you that you received in your inbox are displayed in the To-Do Bar Task List and the Daily Task List.

- In the reading pane of Outlook 2007, in the SharePoint Server 2007 task e-mail message, click **View and Synchronize** '[Task List Name]' list.



After you click the link, the task on the SharePoint Server 2007 site is added to your To-Do Bar task list. A folder with the SharePoint Server 2007 Task List name also appears under **Other Tasks** in the tasks navigation pane.

Note To opt-out of receiving SharePoint Server 2007 Tasks in Outlook 2007, click **Modify Notification Settings** in the body of the SharePoint Server 2007 task e-mail message.

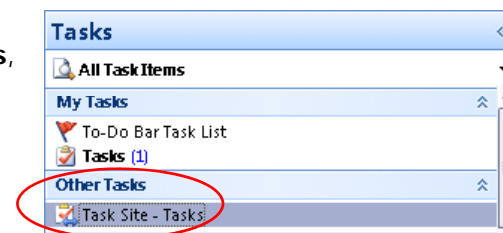
Use Outlook 2007 to Create SharePoint Server 2007 Tasks

You can create and assign tasks from Outlook 2007 to a SharePoint Server 2007 task list. This allows you to use Outlook 2007 to manage tasks that exist on a SharePoint Server 2007 site.

Note To complete the procedure below, you must be connected to a SharePoint Server 2007 task list. See "Connect Outlook to a SharePoint Server 2007 Task List" earlier in this guide.

1 On the Outlook 2007 navigation pane, click **Tasks**.

2 In the **All Task Items** section, under **Other Tasks**, click the SharePoint site where your tasks reside.



3 On the **File** menu, point to **New**, and then click **Task**.

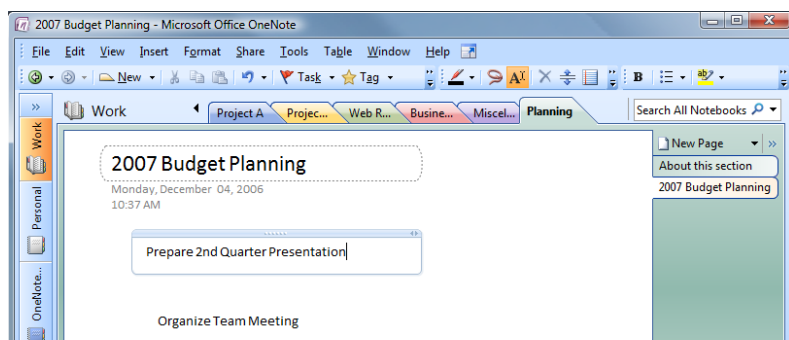
4 In the task window, add a specific start date, due date, any additional information, or assign the task, and then click **Save & Close**. Any changes made to the task in Outlook are saved to the SharePoint tasks list.

Note Only the tasks assigned to you are displayed in the To-Do Bar task list and the Daily Task List.

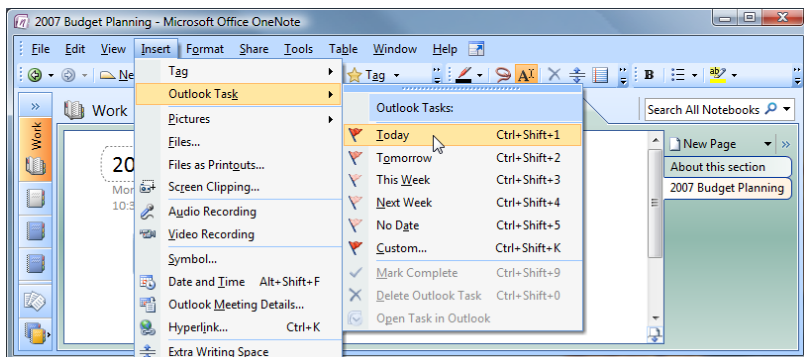
Create an Outlook 2007 Task from OneNote 2007

Create Outlook 2007 tasks using OneNote 2007, and then view and manage the tasks using Outlook 2007. Changes you make to these tasks in Outlook 2007 or OneNote 2007 are synchronized automatically.

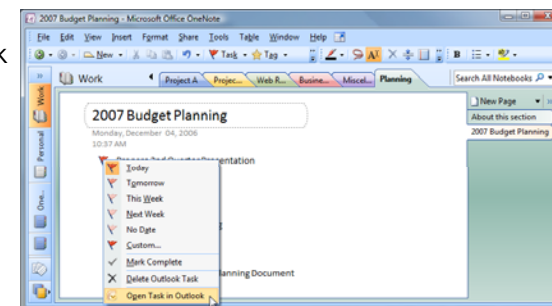
- 1 Click the note to which you would like to add a task.



- 2 On the **Insert** menu, point to **Outlook Task**, and then click a flag. The flagged task now appears in Outlook 2007 on the task list and the To-Do Bar Task List.

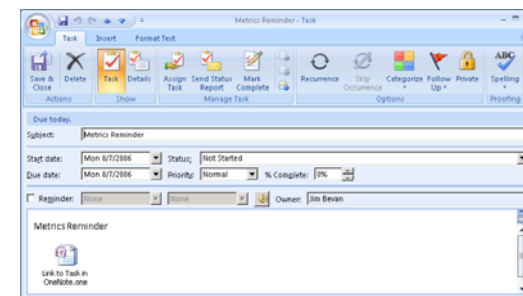


- 3 To add task details in OneNote 2007, right-click the flag, and then click **Open Task in Outlook**, -OR-



To add task details in Outlook 2007, double-click the task in the **To-Do Bar** task list.

- 4 In the task window, add a reminder, any additional information, specific start or due dates, or assign the task, and then click **Save & Close**.



The task is now in your OneNote 2007 notes and Outlook 2007 To-Do Bar task list. You can manage the task using Outlook 2007.

Notes

- Make minor changes to the task in OneNote 2007 without opening the task in Outlook 2007. In OneNote 2007, right-click the flag next to the note, and then click a flag, mark the task complete, or delete the task. The change is automatically saved in Outlook 2007. To make more detailed changes, open the task in Outlook 2007 as described earlier in this guide.
- To go from the open task in Outlook 2007 to the OneNote 2007 page where the task resides, double-click the OneNote 2007 icon in the task body. See the image earlier in this guide.