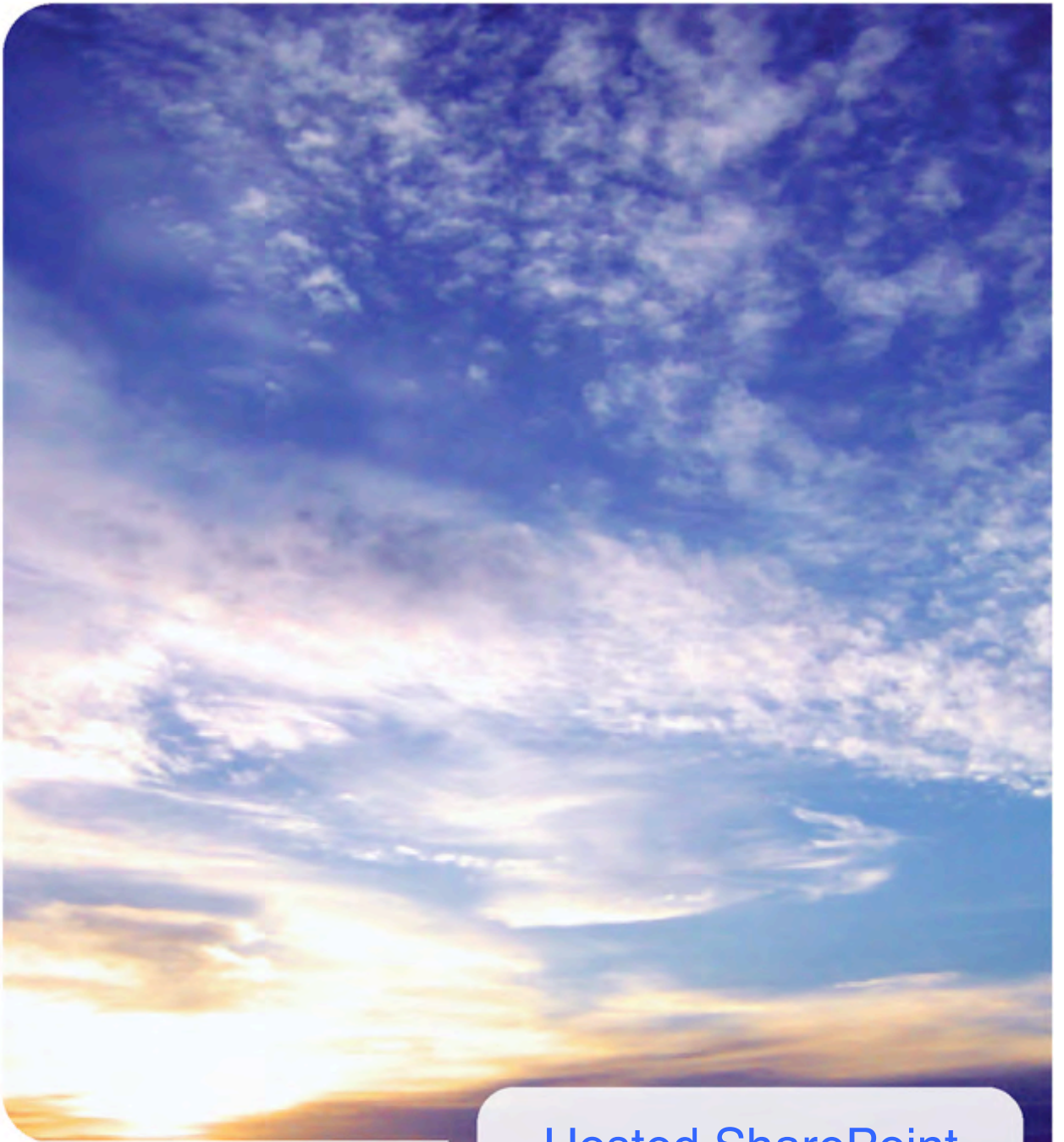


syncmyTMmail



Hosted SharePoint
Setup Instructions

www.syncmymail.com

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1 Explore a SharePoint homepage

The most common SharePoint site is a team site, through which team members can collaborate and communicate. The SharePoint Team Site template includes a document library and basic lists such as Announcements, Contacts, Events, and Quick Links.

1. Start Internet Explorer to display the default team site. New security measures in Windows SharePoint Services eliminate clutter by helping to ensure that each SharePoint site user sees only the parts of the site that he or she has access to.

If other sites are available from this one, you access them from the navigation bar at the top.

You access this site's document libraries and lists from the Quick Launch bar on the left side of the window. You can add any items you like to the Quick Launch bar, including text and images.

You can quickly locate specific items by using the site-wide Search function. Various types of information such as announcements, calendars, links, and discussion boards are presented on the home page in Web Parts. The SharePoint site administrator can format and position each Web Part without affecting its content.

1. On the **Quick Launch** bar, click **Shared Documents**. The contents of the default document library are displayed.

You can share many types of files such as Word documents, Excel workbooks, and PowerPoint presentations (collectively referred to as *documents*) with team members by adding them to a SharePoint document library. You can add existing documents or create new documents from within a document library.

Each document library supports the creation of one or more types of document. Documents you create from within a document library are automatically added to it. You specify the default document type while creating the document library. If your team uses custom document templates, you can also make these available from the document library.

To create a new document from within a SharePoint document library, simply select the type of document you want to create from the **New** menu.

2. On the **Quick Launch** bar, click **Tasks**. The contents of this list are displayed. This is the same information that is displayed on the home page in the Tasks Web Part.

2 Create a SharePoint list or library

Windows SharePoint Services provides many standard document libraries and lists. You can use these as-is, modify them to fit your needs, or create your own from scratch.

1. Start Internet Explorer to display the default team site.
2. On the **Quick Launch** bar, click **View All Site Content**. The All Site Content page provides access to all document and picture libraries, lists, surveys, sites, and workspaces that are linked to the site, as well as access to the Recycle Bin.
3. At the top of the **All Site Content** page, click **Create**. The **Create** page is displayed. From this page, you can create a new document library, picture library, list, custom list, survey, or Web page.

NOTE: Contributor rights are required for some site actions, but even an invited member can create new site elements. As a result, the Windows SharePoint Services technology fosters a highly collaborative environment.

4. Hover over a few of the elements that interest you. A description of the element is displayed at the top of the **Create** page.
5. In the **Libraries** section, click **Document Library**. The **New Document Library** page is displayed.
6. In the **Name** box, type the name that you want to give the document library.
7. In the **Description** box, type the description of the document library.
8. In the **Create a version each time you edit a file in this document library?** area, select **Yes**.
9. In the **Document Template** box, select a default document format for your library. If you want to create and store different types of documents in your library, select **None**.
10. Click **Create**. The new document library opens, ready for you to add documents to it.

You can export a copy of a document library from a SharePoint site to Office Outlook 2007. You can preview documents, spreadsheets, and presentations in the Outlook message pane, and work with local copies of the documents on your computer.

3 Create an announcement

1. Start Internet Explorer to display the default team site.
2. At the bottom of the **Announcements** Web Part, click **Add new announcement**. The **Announcements: New Item** page is displayed.
3. In the Title box, type **Special Employee Health Club Offer**.
4. In the **Body** box, type **The local health club is offering a 20 percent discount on annual memberships for employees purchasing new memberships or renewing by the end of this month.**

You can format the text of your announcement by using the formatting buttons above the **Body** box. You can attach files to the announcement by clicking the **Attach File** button on the toolbar.

5. To the right of the **Expires** box, click **Date Picker**, and then click the last day of the month.

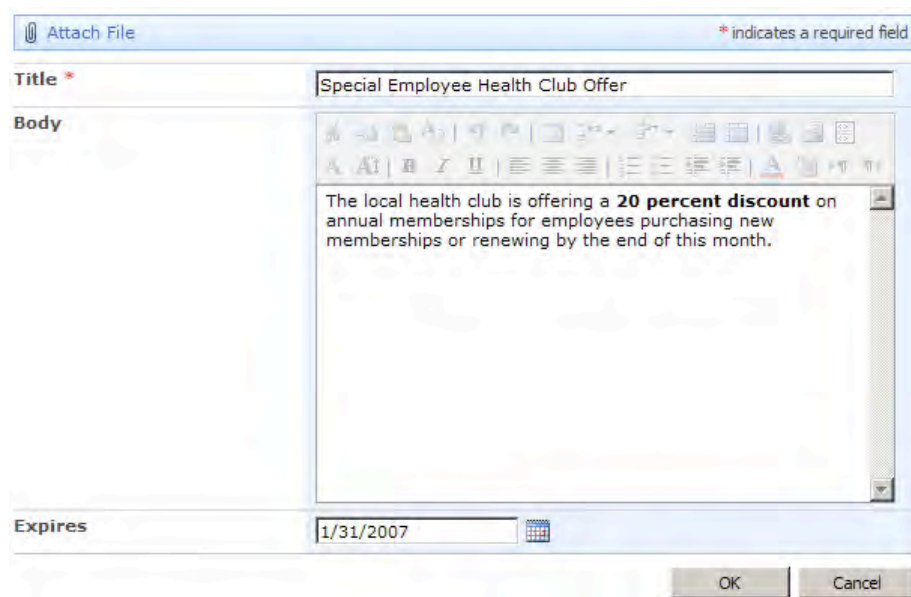
The image shows a screenshot of a web browser window displaying the 'Announcements: New Item' form. At the top left is an 'Attach File' button. The 'Title' field is marked with an asterisk and contains the text 'Special Employee Health Club Offer'. Below the title is a rich text editor for the 'Body' field, which contains the text 'The local health club is offering a 20 percent discount on annual memberships for employees purchasing new memberships or renewing by the end of this month.' The 'Expires' field is marked with an asterisk and contains the date '1/31/2007'. To the right of the date is a calendar icon. At the bottom right are 'OK' and 'Cancel' buttons. A legend indicates that an asterisk indicates a required field.

Figure 1. Creating a new announcement.

6. Make any additional changes you want, and then click **OK**. The new announcement appears in the **Announcements** list.

4 View and modify document version control

By default, only the current version of a document is available to site users in a document library. However, if your organization is concerned about version control, you can choose to retain previous versions in the library. Site users can then view previous versions to locate lost content or to discover the source or date of a particular change.

1. Start Internet Explorer to display the default team site.
2. On the **Quick Launch** bar, click **Shared Documents**.
3. On the **Settings** menu, click **Document Library Settings**. The **Customize Shared Documents page is displayed**.

From this page, you can make changes to the general settings, permissions and policies, communications, columns, and views of the selected document library. Changes you make on this page do not affect the entire site.

NOTE: Notice the many types of changes you can make from the **Customize** page. You might want to explore the options on this page on your own.

4. In the **General Settings** list, click **Versioning Settings**. You now see the **Document Library Versioning Settings** page for the Shared **Documents document library**. From this page, you can specify whether:

A specific person must approve new and changed documents before they are available from the site.

Windows SharePoint Services retains prior versions of updated documents.

Site users can see draft documents that haven't been declared final.

Users must check out documents before editing them.

Users can create multiple types of content from the **New** menu.

Each of these options is useful when developing content in a collaborative environment.

NOTE: The Content Approval option is part of the new Windows Workflow Foundation functionality. If you use Office SharePoint Designer 2007 to create and manage SharePoint sites, you can attach workflows to document libraries and lists. These workflows monitor events and conditions within the library or list and then take action, such as routing a file for approval or sending an e-mail message.

- In the **Document Version History** area, select the **Create major versions** option. You can select the version options that fit best with the expected frequency of document updates. You can also specify how many previous versions of a document should be retained.
- In the **Require Check Out** area, select the **Yes** option.

<p>Content Approval</p> <p>Specify whether new items or changes to existing items should remain in a draft state until they have been approved. Learn about requiring approval.</p>	<p>Require content approval for submitted items?</p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No</p>
<p>Document Version History</p> <p>Specify whether a version is created each time you edit a file in this document library. Learn about versions.</p>	<p>Create a version each time you edit a file in this document library?</p> <p><input type="radio"/> No versioning</p> <p><input checked="" type="radio"/> Create major versions Example: 1, 2, 3, 4</p> <p><input type="radio"/> Create major and minor (draft) versions Example: 1.0, 1.1, 1.2, 2.0</p> <p>Optionally limit the number of versions to retain:</p> <p><input type="checkbox"/> Keep the following number of major versions: <input type="text"/></p> <p><input type="checkbox"/> Keep drafts for the following number of major versions: <input type="text"/></p>
<p>Draft Item Security</p> <p>Drafts are minor versions or items which have not been approved. Specify which users should be able to view drafts in this document library. Learn about specifying who can view and edit drafts.</p>	<p>Who should see draft items in this document library?</p> <p><input checked="" type="radio"/> Any user who can read items</p> <p><input type="radio"/> Only users who can edit items</p> <p><input type="radio"/> Only users who can approve items (and the author of the item)</p>
<p>Require Check Out</p> <p>Specify whether users must check out documents before making changes in this document library. Learn about requiring check out.</p>	<p>Require documents to be checked out before they can be edited?</p> <p><input checked="" type="radio"/> Yes <input type="radio"/> No</p>

Figure 2. Configuring document library versions settings.

- On the **Document Library Versioning Settings** page, click **OK**.

5 Sign up for an alert

Alerts are a very useful part of the Windows SharePoint Services technology. You can sign up to receive an alert when a change is made to the contents of a document library. This technique keeps you up to date with the document updates that you need to know about so you don't have to constantly check the library.

1. Start Internet Explorer to display the default team site.
2. On the **Quick Launch** bar, click **Shared Documents**.
3. On the **Actions** menu, click **Alert Me**. The **New Alert** page is displayed.

If you retain the default settings, you will be notified when any type of change is made to any document within the selected document library. You can change the settings to restrict the alerts to certain types of changes. You can also specify whether notifications should be sent immediately, daily, or weekly.

4. On the **New Alert** page, click **OK**. An e-mail message notifies you when the alert has been created.
5. Start Outlook, and display the Inbox. The alert notification appears in the Inbox.

6 How to upload a document to SharePoint

Information that is important to an organization, a business unit, or a project team is often stored on an individual's computer. To facilitate the easy sharing of information, you can make files available to other SharePoint site users.

1. Start Internet Explorer to display the default team site.
2. On the **Quick Launch** bar, click **Shared Documents**.
3. On the **Upload** menu, click **Upload Document**. You see the **Upload Document** page for the selected document library.
4. In the **Upload Document** area, click the **Browse** button.
5. In the **Choose File** dialog box, browse to the document you want to upload, and then click **Open**.

NOTE: If a document with the same name already exists in the document library, selecting the *Overwrite Existing File(s)* check box automatically overwrites the existing version with your local version.

6. On the **Upload Document** page, click **OK**. The selected document is added to the document library.

7 Modify a document from a SharePoint site

You can easily “check out” a document from a SharePoint site, make changes to it, and then “check it in” to make your modified version available to all site members.

1. Start Internet Explorer to display the default team site.
2. On the **Quick Launch** bar, click **Shared Documents**.
3. In the document library, click a document, click the arrow that appears to the right of the document name, and then click **Check Out**. When you check out a document, you can choose to work with an online or offline copy of the document.
4. In the **Microsoft Internet Explorer** message box, with the **Work Offline** check box selected, click **OK**. The document is now checked out to you. Other users will not be able to edit the document until you check it back in.
5. In the document library, click the same document, click the arrow that appears to the right of the document name, and then click **Edit in Microsoft Office Word**.
6. In the **Microsoft Internet Explorer** message box that asks you to confirm that you want to open the file, click **OK**. Office Word 2007 starts and displays the selected document. The **Document Management** task pane on the right side of the screen displays the open document’s status. Separate tabs display information about site members, tasks, documents, and links.
7. Scroll down the document.
8. Select the word and change it to **Ongoing**.
9. In the **Document Management** task pane, click **Check In**. The **Check In** dialog box appears.
10. In the **Comments** box, type **Corrected spelling error**. Then click **OK**.

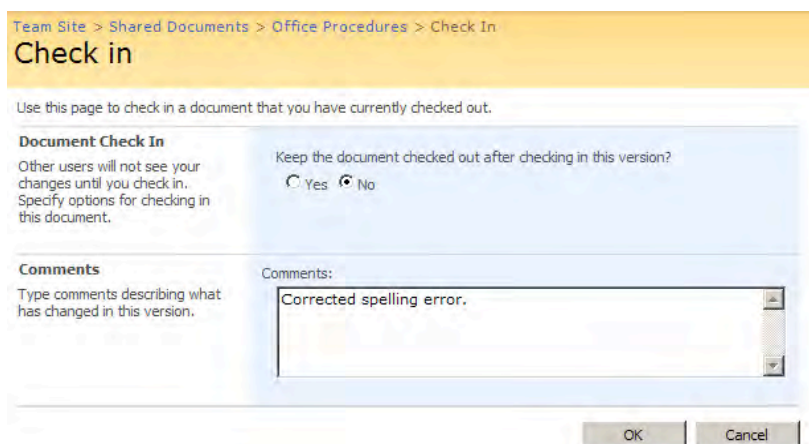


Figure 3: Checking-in a document.

NOTE: *You have the option of checking in the current version and then checking it out again. Using this option helps ensure that current information is available to site users while you are still developing the final content.*

The **Document Management** task pane now shows the status of the document as read-only. You can open the document for more editing by clicking **Edit Document** on the **Server Document** bar at the top of the Word workspace.

11. On the Word **File** menu, click **Close**. The **Shared Documents** page now shows the modification date and time, as well as any check-in comments.

If you enabled versioning in Exercise 4, you have now created Version 2 of the Music Market document. If you signed up for e-mail alerts in Exercise 5, you will receive one now.

8 View an RSS feed

Many news sites, blogs, and other online information providers use Really Simple Syndication (RSS) to automatically feed information to subscribers. With Windows SharePoint Services, every SharePoint list is RSS-enabled. If you have an RSS reader (such as in Office Outlook 2007 or Internet Explorer 7), you can view the RSS feed for a document library or list. Changes to the list content will appear in your RSS reader.

1. Start Internet Explorer to display the default team site.
2. On the **Quick Launch** bar, click **Shared Documents**.
3. On the **Actions** menu, click **View RSS Feed**. The **RSS Feed** page for the selected document library is displayed. The page provides links to each document in the library and shows the current status of each one.
4. In the text below the page title, click **Subscribe to this RSS feed**.
5. Start Office Outlook 2007.
6. In the **All Mail Items** list in the Navigation Pane, click **RSS Subscriptions**. Outlook 2007 displays the **Shared Documents** document library information.

9 Create a SharePoint team site

As a security measure, Windows SharePoint Services allows each site user to see only those actions he or she has permission to perform. Provided you have permission to create sites and workspaces, you can easily add new sites and workspaces to your organization's primary SharePoint site.

1. Start Internet Explorer to display the default team site.
2. In the upper-right corner of the home page, click **Site Actions**, and then click **Create**. The **Create** page is displayed.

NOTE: *The Site Actions tab appears only if the user has permission to create sites, create pages, edit pages, or manage site settings. The Site Actions list includes only the actions that the user is allowed to perform.*

3. In the **Web Pages** list, click **Sites and Workspaces**. You see the **New SharePoint Site** page.

4. In the **Title and Description** area, type **Marketing Team** in the **Title** box and **This is a central collaboration point for all marketing campaigns** in the **Description** box.
5. In the **Web Site Address** area, type **marketing** in the **URL name** box.

NOTE: *The name you type here is added to the end of the parent site's Web address. After creating the site, you can change the title and description, but you can't change the URL without deleting and recreating the site.*

6. In the **Template Selection** area, click **Team Site** in the **Select a template** list.

The available templates vary based on how the Windows SharePoint Services technology is installed. The wide variety of prebuilt templates will fit most needs, but custom templates can also appear in this list. Notice the new Wiki Site and Blog templates.
7. In the **Permissions** area, leave selected the **Use same permissions as parent site** option. With this option, changes to the parent site's permissions are quickly reflected on this sub-site.
8. On the **New SharePoint Site** page, click **Create**.

NOTE: *If you selected the **Use Unique Permissions** option in step 6, you are now asked to set up groups for the visitors, members, and owners of the new site.*

9. SharePoint displays the new Marketing Team site.

10 Add a Web Part

Web Parts are ASP.NET server controls that display content defined by a site administrator or site user. You can easily add, configure, move, and close Web Parts.

1. Start Internet Explorer to display the default team site.

The Announcements, Calendar, and Links areas that appear on this site's home page are standard Web Parts created by the Team Site template. Each Web Part displays a view of its corresponding list.

2. Click the arrow at the right end of the **Announcements** Web Part header and then click **Close** to hide the Web Part.

Closing a Web Part does not delete the associated list. Depending on your permissions, you might be able to customize the Web Part display of only your personal view of the site, or you might be able to customize the views of all site visitors.

3. In the upper-right corner of the page, click **Site Actions**, and then click **Edit Page**.

The page switches to Design Mode, as indicated by the **Exit Edit Mode** button under the **Site Actions** button. In Design Mode, you can add new Web Parts and remove or update existing Web Parts on the page.

The logo appearing in the upper-right corner of the page is displayed by a Site Image Web Part.

4. In the upper-right corner of the **Site Image** Web Part, click the **X** to remove the logo from the page. The current page is organized in **Left and Right** columns. You can also add a Center column.
5. At the top of the **Left** column, click **Add a Web Part**. The **Add Web Parts To Left** dialog box opens.

NOTE: *This technique is new in Windows SharePoint Services and provides a much simpler way of adding Web Parts than in previous versions.*

6. In the **Lists and Libraries** list, select the **Shared Documents** check box, and then click **Add**.

The **Shared Documents** Web Part appears at the top of the Left column.

7. At the top of the **Right** column, click **Add a Web Part**. The **Add Web Parts To Right** dialog box opens.

8. Scroll to the end of the list, select the **Page Viewer** check box, and then click **Add**. The **Page Viewer Web Part** appears at the top of the Right column.
9. In the upper-right corner of the page, click **Exit Design Mode**. The new Web Parts appear on the site. By default, each appears at the top of its column. You can easily move Web Parts within or between columns.
10. In the upper-right corner of the page, click **Site Actions**, and then click **Edit Page**.
11. Click the **Page Viewer** Web Part header, and when the pointer becomes a four-headed arrow, drag the Web Part to the top of the Left column.
12. In the upper-right corner of the page, click **Exit Design Mode** to return to the standard view of the site's home page.

11 Configure a Web Part

After you add a Web Part to a page, you can easily configure it to display the content you want.

1. Complete Exercise 3 to add a Page Viewer Web Part to the default team site home page.
2. Click the arrow at the right end of the **Page Viewer** Web Part header, and then click **Modify Shared Web Part**. The **Page Viewer** Web Part pane opens. You can display a Web page, folder, or file in this type of Web Part.
3. With the Web Page option selected, type ***http://office.microsoft.com*** in the **Link** box, and click **OK**. A portion of the Office Online Web page *appears in the Page Viewer* Web Part.

12 Upload a document

If you want to make a document that you have created on your own computer available to other people, you can easily share it by uploading it to a SharePoint site.

1. Start Internet Explorer to display the default team site.
2. On the **Quick Launch** bar, click **Shared Documents**.
3. On the **Upload** menu, click **Upload Document**. SharePoint displays the **Upload Document** page for the selected document library.
4. In the **Upload Document** area, click the **Browse** button.
5. In the **Choose File** dialog box, browse to the file that you want to upload, and then click **Open**.

NOTE: *If a document with the same name already exists in the SharePoint document library, selecting the **Overwrite Existing File(s)** check box automatically overwrites the existing version with your local version.*

6. On the **Upload Document** page, click **OK**. SharePoint adds the selected document to the document library.

The Windows SharePoint Services technology enables you to define access rights for individual documents. To control who can access a document after you have uploaded it, display the document library, click the document, click the arrow that appears to the right of the document name, and then click **Manage Permissions**.

13 Create a document folder

Document libraries can contain folders as well as files. Just as you can set permissions for a document, you can set permissions at the folder level. For example, you might want to restrict access to a folder containing sensitive financial data.

1. Start Internet Explorer to display the default team site.
2. On the **Quick Launch** bar, click **Shared Documents**. The **Shared Documents** document library is displayed.
3. On the New menu, click **New Folder**. You now see the **Shared Documents: New Folder** page.
4. In the Name box, type a name for the new folder, and then click **OK**. You can add documents to the folder the same way you add them to a top-level content library.

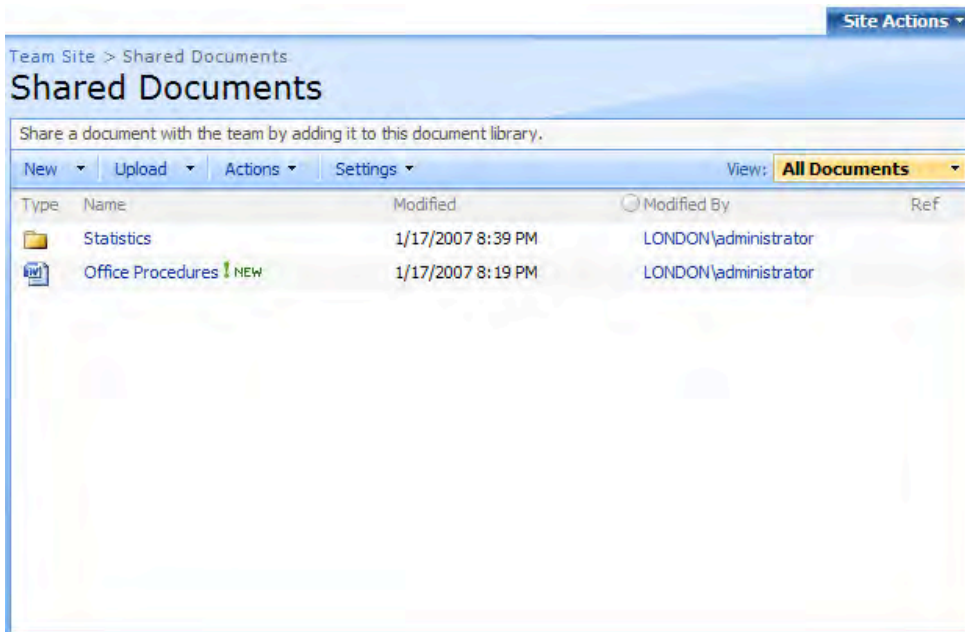


Figure 4: A list of documents and folders within a SharePoint document library.

14 Create and populate a list

Windows SharePoint Services provides many types of lists, each of which is configured to store a specific type of content. SharePoint sites created from prebuilt templates automatically include appropriate lists. You can delete the lists you don't need and add new lists.

1. Start Internet Explorer to display the default team site.
2. In the upper-right corner of the page, click **Site Actions**, and then click **Create**. The **Create** page is displayed. Notice the variety of lists you can create.
3. **In the Communications, Tracking, and Custom Lists**, click each type of list to view a description at the top of the page.
4. In the **Communications** list, click **Contacts**. You see the **New** page.
5. In the **Name and Description** area, type **Employees** in the **Name** box and **Employee after-hours contact information** in the **Description** box. By default, a link to this list will appear on the Quick Launch bar.
6. On the **New** page, click **Create**. The **Employees** contact list is displayed.
7. On the **New** menu, click **New Item**. The **Employees: New Item** page is displayed. Notice the fields created as part of the contact list.

NOTE: *If the default fields created by a list template don't meet your needs, you can add, edit, or delete fields. To do this, display the list, and then click the **Settings** menu.*

8. Type your own information into the contact list fields, and then click **OK**. The **Employees** list displays your contact information. You can attach files to contact list items. For example, you might want to attach a photo or resume.

15 Create a custom list from an Excel workbook

Windows SharePoint Services supports larger, more versatile lists than previous versions. If you have already entered a list of information in an Excel worksheet, you don't have to retype the data in a SharePoint list. You can import the Excel data as a SharePoint list to make it easily available to team members.

1. Start Internet Explorer to display the default team site.
2. In the upper-right corner of the page, click **Site Actions**, and then click **Create**. The **Create** page is displayed. Notice the variety of ways in which you can create custom lists.
3. In the **Custom Lists** list, click each type of list to view a description at the top of the page.
4. In the **Custom Lists** list, click **Import Spreadsheet**. You see the New page.
5. In the **Name and Description** area, type a name for the list in the Name box and a brief description in the **Description** box.
6. In the **Import from Spreadsheet** area, click the **Browse** button.
7. In the **Choose File** dialog box displaying your My Documents folder, click an existing Excel spreadsheet, and then click **Open**.
8. On the **New** page, click **Import**. The selected workbook opens in Excel, and the **Import to Windows SharePoint Services List** dialog box appears.
9. At the bottom of the Excel workspace, click the sheet tab you want. Excel selects the table on that worksheet and enters the corresponding information in the **Import to Windows SharePoint Services List** dialog box.
10. In the **Import to Windows SharePoint Services** list dialog box, click **Import**.

Windows SharePoint Services Integration with Microsoft Office

Smart client programs, such as the Microsoft Office system can be easily integrated with Windows SharePoint Services by means of a set of Web Services and documented application interfaces. For example, Word, Excel, PowerPoint, InfoPath, Project, and OneNote can all work with information stored on SharePoint sites. While working in a Microsoft Office system client application, users can interact with Windows SharePoint Services to create workspaces, post and edit documents, and assign tasks on SharePoint sites. In Office Outlook 2007, users can view calendars and contact lists stored on SharePoint sites and can create and manage sites for organizing meetings.

The exercises in this Windows SharePoint Services tour show you some of the new ways to work with the Windows SharePoint Services technology.

16 Add an appointment to a SharePoint calendar

The Calendar Web Part is a default part of a SharePoint site that is based on the Team Site template. You can add appointments, tasks, and reminders to the SharePoint calendar, and they will be visible to all site users. To receive notifications about team meetings and activities, site users can subscribe to the calendar.

1. Start Internet Explorer to display the default team site. The **Calendar Web Part** on the home page lists upcoming meetings.
2. On the team site home page, click the **Calendar** Web Part title. The calendar for the current month is displayed. You can change the period the calendar displays by clicking **Day**, **Week**, or **Month** in the upper-right corner. In the upper-left corner, a date-picker displays the months of the year (when you're in Month view) or the days of the month (when you're in Day or Week view). Click any day or month to display that time period. SharePoint displays the current date under the date-picker. You can click the date to see more information.
3. On the menu bar above the calendar, click **New**, and then click **New Item**. Add an appointment for any time next Monday.
4. Above the Calendar page title, click **Team Site**. The new appointment is shown in the **Calendar Web Part**.

17 Work with a SharePoint calendar in Outlook 2007

When Office Outlook 2007 is integrated with Windows SharePoint Services, it's easy to manage all your calendar information, including information from calendars stored on a SharePoint site, from one location. You can display a SharePoint calendar either within Outlook or from the SharePoint site.

1. Start Outlook, and display the **Calendar**.
2. Start Internet Explorer, and display the default team site.
3. On the team site home page, click the **Calendar** Web Part title. The Calendar is displayed.
4. On the **Actions menu**, click **Connect to Outlook**.

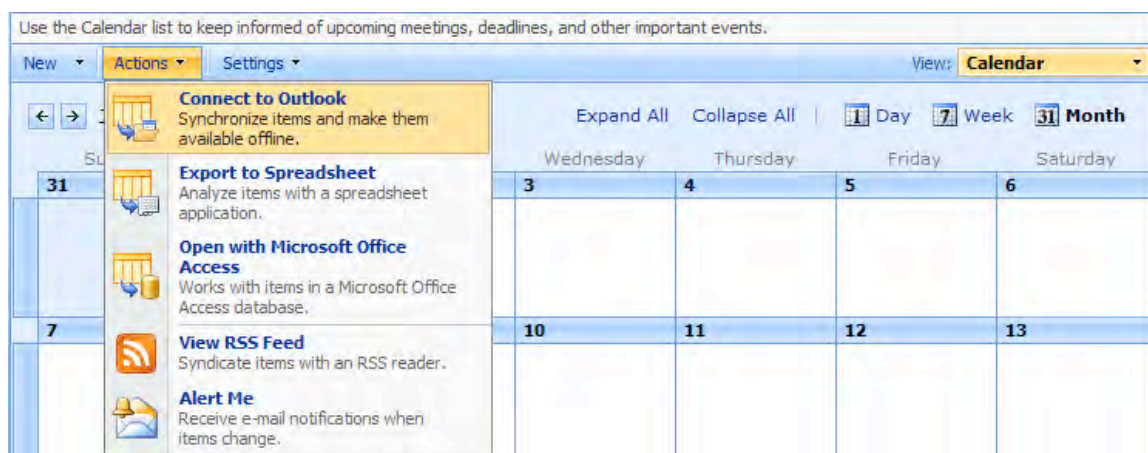


Figure 5: Connecting a SharePoint calendar to Office Outlook 2007.

Outlook displays your calendar and the default calendar side by side.

You can view multiple calendars side by side or in overlay mode, in which the contents of the calendars appear on top of each other. This makes it easy to locate scheduling conflicts between multiple calendars.

5. In Outlook, click the arrow on the **default** calendar tab. Outlook displays your calendar and the default calendar in overlay mode. You can switch between the calendars by clicking their tabs. To return to side-by-side mode, click the arrow on either calendar tab.

You can work with the SharePoint calendar as you would with your regular Outlook calendar. Any changes you make to the SharePoint calendar in Outlook are reflected in the calendar when it is viewed on the SharePoint site.

18 Add appointment to a calendar from Outlook 2007

When you display a SharePoint calendar in Outlook, you can add appointments to it in the same way that you would add appointments to your personal Outlook calendar.

1. Complete Exercise 2 to display the SharePoint calendar in the Outlook **Calendar** component.
2. On the SharePoint calendar, create an appointment for any time next Tuesday.
3. On the **Tools** menu, click **Send/Receive**, and then click **Send/Receive All**.
4. Start Internet Explorer to display the default team site.

NOTE: *If the default site is already open, click the Refresh button on the Internet Explorer toolbar.*

The new appointment is shown in the Calendar Web Part.

You can convert a nonrecurring appointment to a team meeting by dragging it from your Outlook calendar to the SharePoint calendar. You can also drag tasks from your Outlook tasks list to the SharePoint calendar.

19 Work offline with document libraries in Office 2007

You can export a copy of a document library from a SharePoint site to Office Outlook 2007. You can then preview documents, worksheets, and presentations in the Outlook 2007 message pane, or work with local copies of the documents on your computer.

1. Start Outlook 2007.
2. Start Internet Explorer to display the default team site.
3. On the **Quick Launch** bar, click **Shared Documents**.
4. On the **Actions** menu, click **Connect to Outlook 2007**.

Outlook 2007 creates and displays the default—the **Shared Documents** folder. In this folder, each of the document library items appears as an Outlook 2007 item.

5. Click an item from the folder once. The document opens and appears in the message preview pane. The preview pane enables you to preview many kinds of documents, including PowerPoint slides.
6. Double-click an item from the folder. You can open the document or save it on your local computer.
7. In the **Opening Mail Attachment** dialog box, click **Open**.

Word opens the selected document as a read-only file. The document status appears on the Document Action Bar above the workspace.

20 Create a document library from within Outlook 2007

If you are working in Outlook 2007 and you need to create a new workspace for collaborating with colleagues about a specific topic, you don't need to stop work and move to a SharePoint site to do the setup work. You can create and populate a document workspace from within Outlook 2007.

1. Start Outlook 2007.
2. Create a new e-mail message. In the **To** box, type **john.doe@company.com** (or your e-mail address), and in the **Subject** box, type **Office Procedures**.

NOTE: For the purposes of this exercise, you are sending the e-mail message to yourself.

3. In the message header, click the **Attach** button.
4. In the **Insert File** dialog box displaying your My Documents folder, click **Office Procedures**, and then click **Insert**.
5. On the **Write** tab, in the **Message Options** group, click **Attach File**, and then click **Attachment Options**. Outlook 2007 displays the **Attachment Options** task pane.
6. Select the **Shared attachments** option.
7. In the **Create Document Workspace** at drop-down list, click the default Web site.
8. On the **File** menu, click **Send**. A document workspace containing the shared attachment is created on the SharePoint site. In Outlook 2007, you receive an e-mail with a link to the document workspace.
9. With the **Office Procedures Document Workspace** e-mail message selected in the Inbox, in the preview pane, click the link to the document workspace. Internet Explorer starts, displaying the new document workspace. The e-mail message recipient appears in the **Members** list.

21 Create a document library from within Microsoft Office

If you want to create a workspace for collaborating with colleagues about the document you're working in, you don't need to stop work and move to a SharePoint site to do the setup work. You can create and populate a document workspace from within Office Word 2007, Office Excel 2007, or Office PowerPoint 2007.

1. Start Word, and from your **My Documents** folder, open a Word, Excel, PowerPoint, or other Microsoft Office document.
2. On the **File** menu, click **Publish**, and then click **Create Document Workspace**. Word displays the **Document Management** task pane.
3. In the **Document Workspace name** box, change the name to **Invitations**.
4. In the **Location for new workspace** drop-down list, click the default Web site.
5. On the **Document Management** task pane, click **Create**.

A document workspace containing the current document is created on the SharePoint site. Word displays the document workspace information in the **Document Management** task pane.

6. In the **Document Management** task pane, click each of the workspace tabs to see the available information.
7. Start Internet Explorer to display the default team site.
8. On the **Quick Launch** bar, click **View All Site Content**, and then in the **Document Workspaces** list, click **Invitations**.

The **Invitations** document workspace is displayed. The document appears in the **Shared Documents** list, and you appear as the only member in the **Members** list. You can add other members to the workspace as you would to any other SharePoint library.

You can create a document library from within Excel or PowerPoint by opening the workbook or presentation you want to share, and then following steps two through five.

22 Contact information and copyright

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