

ProperSync 1.3 User Manual

Rev 1.2

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Overview of ProperSync

What is ProperSync

ProperSync is an Outlook add-in that exposes SharePoint custom fields within Outlook. ProperSync supports the following items connected to Outlook

- SharePoint Calendars
- SharePoint Tasks
- SharePoint Contacts

What's new in ProperSync 1.3

- New Sync Engine
 - a. Fixes Outlook conflict issues with items
- Sync directly to any Outlook Contact, Calendar or Task folder
 - a. Sync your team calendar to your personal calendar
 - b. Sync your contacts to your team SharePoint CRM

Getting Started

Installing ProperSync

For individual users, ProperSync has one simple installer. To install ProperSync:

- 1) Close Microsoft Outlook
- 2) Open the ProperSync zip file downloaded from http://www.propersync.com/downloads.aspx
- 3) Run the setup.exe file
- 4) Click Next from the main screen

B ProperSync	
Welcome to the ProperSync Setup Wizard	
The installer will guide you through the steps required to install ProperSy	nc on your computer.
WARNING: This computer program is protected by copyright law and in Unauthorized duplication or distribution of this program, or any portion of or criminal penalties, and will be prosecuted to the maximum extent poss	iternational treaties. f it, may result in severe civil sible under the law.
Cancel < B	ack Next >

5) Read the License Agreement, if you agree with the terms, click on the I Agree radio button, then click Next

ProperSync		- • •
License Agreement		
Please take a moment to read the Agree", then "Next". Otherwise cl	license agreement now. If you acco ick "Cancel".	ept the terms below, click ''I
electronic documen installing, copyin PRODUCT, you agree EULA. This license agreement concerni Channelmatter Inc. supersedes any pri understanding betw to the terms of th	tation ("SOFTWARE PRO g, or otherwise using to be bound by the t agreement represents ng the program betwee , (referred to as "li or proposal, represen een the parties. If y is EULA, do not insta	DUCT"). By the SOFTWARE erms of this the entire on you and censer"), and it tation, or you do not agree 11 or use the \neg
🔘 I Do Not Agree	 I Agree 	
	Cancel <	Back Next >

6) Verify the **Install Folder** is correct, use the **Browse** button if you wish to correct it, then click **Next**

ProperSync	- • •
Select Installation Folder	
The installer will install ProperSync to the following folder. To install in this folder, click "Next". To install to a different folder, enter it be	elow or click "Browse".
Eolder: C:\Users\carsten\AppData\Roaming\Channelmatter\ProperSync\	Browse Disk Cost
Cancel < Back	Next >

7) When ready to Install ProperSync, click Next on the Confirm Installation page

B ProperSync			
Confirm Installation			
The installer is ready to install ProperSyr	no on your computer.		
Click "Next" to start the installation.			
	Cancel	< Back	Next >

8) The ProperSync installer will complete the installation of ProperSync on your machine. When the installation is complete the **ProperSync Information** screen will appear



9) Click Next after reading the ProperSync ReadMe information

ProperSync	
Installation Complete	
ProperSync has been successfully installed.	
Click "Close" to exit.	
Please use Windows Update to check for any critical updates to the .NET	Framework.
Cancel < Back	Close

10) The installation is now complete. Press Close to close the installer

Activating ProperSync

ProperSync can be activated directly within an Outlook appointment item or task. It can also be activated within the ProperSync settings area.

To activate ProperSync within an Outlook appointment or task item

- 1) Open Microsoft Outlook
- 2) Browse to a SharePoint calendar or task list within Outlook
- 3) Open an item from the list or select New Item from the Outlook menu
- 4) On top of the **ProperSync Pane**, click the **Activate Now** link on the top of the ProperSync Fields pane (if this link is not present, then ProperSync is already activated)

📒 ProperSync Fi	elds »	
This evaluation of ProperSync will expire in 30 day(s). <u>Click here</u> for details or activate now.		
Client Name:	•	

5) The **ProperSync Activation** window will open. Enter your **license key** in the **Activation/License Key** box, then press **Activate**.

🖳 ProperSync Activation	ı	×
To activate your ProperS If you have an existing va connection is required fo	ync license, enter your Activation Key in the field bel alid License Key, you may enter it instead. An interne r activation.	ow. t
This license is only valid below is correct before a	d forone useraccount. Verify the License Account fie activating.	Ы
Activation/License Key:	1	2
License Account:	CWINSNES\carsten	
Effective License Key:		
License Features:		
Clear License Key	Activate Close	

6) Once the key is properly activated, a response will be appear in the blank space



7) Click Close to close the ProperSync Activation dialog box

To Activate ProperSync from Add-in Options

Outlook 2007

- 1) Open Microsoft Outlook 2007
- 2) From the Tools menu select Options

<u>T</u> oo	ls <u>A</u> ctions <u>H</u> elp
	S <u>e</u> nd/Receive
	Instant Search
	Address <u>B</u> ook Ctrl+Shift+B
貓	Organi <u>z</u> e
	Mailbo <u>x</u> Cleanup
۵	Empty "Deleted Items" Folder
	Eorms +
	Macro •
	Account Settings
	Tru <u>s</u> t Center
	<u>C</u> ustomize
	<u>O</u> ptions

- 3) From the **Options** dialog box select the **ProperSync** tab
- 4) From the ProperSync tab select View License Details

(Options						[
	Preferences	Mail Setup	Mail Format	Spelling	Other	Propersync	
	Licensing Ir	nformation					
					View Li	cense Detail	s

5) The **ProperSync Activation** window will open. Enter your **license key** in the **Activation/License Key** box, then press **Activate**.

🖳 ProperSync Activation	1	×
To activate your ProperSync license, enter your Activation Key in the field below. If you have an existing valid License Key, you may enter it instead. An internet connection is required for activation.		
This license is only valid below is correct before a	I forone user account. Venify the License Account fie activating.	ы
Activation/License Key:	l	2
License Account:	CWINSNES\carsten	
Effective License Key:		
License Features:		
Clear License Key	Activate Close	

6) Once the key is properly activated, a response will be appear in the blank space

License Features:	Calendar Items, Task Items		
Your license is r	now activated.		
T o			
Clear License Key	Activate Close		

7) Click Close to close the ProperSync Activation dialog box

Outlook 2010

- 1) Open Microsoft Outlook 2010
- 2) Click on the File button



3) From the File menu select Options

	2.117				
File	Home	Send			
🔜 Sav	ve As				
🖳 Sav	ve Attachme	ents			
Info		<			
Open	Open				
Print					
Help					
Dp Op	tions				
🔀 Exi	t				

4) From the **Options** dialog box select **Add-ins**

C	Outlook Options		
	General	Γ	
	Mail		
	Calendar		
	Contacts		
	Tasks		
	Notes and Journal		
	Search		
	Mobile		
	Language		
	Advanced		
	Customize Ribbon		
	Quick Access Toolbar		
	Add-Ins		
	Trust Center		
	I I		

5) From the Add-ins sections select Add-in Options...

View and manage	Microsoft Office Add-ins.
dd-in Options	
Launch Add-in options dial	og: Add-in <u>O</u> ptions
dd-ins	

- 6) From the Add-ins Options dialog box select the ProperSync tab
- 7) From the ProperSync tab press the View License Details button

Add-in Optio	ns	No Char this weath
Propersync	Ceptara Organizer	
Licensing	Information	
		View License Details

8) The **ProperSync Activation** window will open. Enter a **license key** in the **Activation/License Key** box, then press **Activate**.

🖳 ProperSync Activation	ı	×	
To activate your ProperSync license, enter your Activation Key in the field below. If you have an existing valid License Key, you may enter it instead. An internet connection is required for activation.			
This license is only valid below is correct before a	l forone user account. Verify the License Account fie activating.	ы	
Activation/License Key:	I	2	
License Account:	CWINSNES\carsten		
Effective License Key:			
License Features:			
Clear License Key	Activate Close		

9) Once the key is properly activated, a response will be appear in the blank space

License Features:	Calendar Items, Task Items
Your license is	now activated.
Clear License Key	Activate Close

10) Click Close to close the ProperSync Activation dialog box

Uninstalling ProperSync

To uninstall ProperSync, use the default Windows uninstall process

Windows 7 & Vista Users

- 1) Close Microsoft Outlook
- 2) Click the Start Menu and select Control Panel

Computer
Control Panel
Devices and Printers
Default Programs
Help and Support

3) From the Control Panel select Uninstall a Program

Adjust your computer's settings



System and Security Review your computer's status Back up your computer Find and fix problems







Network and Internet View network status and tasks Choose homegroup and sharing options



Hardware and Sound View devices and printers Add a device



Programs Uninstall a program

Get programs

4) From the list of installed programs select **ProperSync**

Uninstall or change a program

To uninstall a program, select it from the list and then click Unir

Organize 🔻 Uninstall Change Repair	
Name	Publishe
Automation Anywhere 6.1	Automa
B Microsoft Office Enterprise 2007	Microso
🎆 Microsoft Online Services Sign In	Microso
B Microsoft Save as PDF or XPS Add-in for 2007 Micros	Microso
ProperSync	Channe
WinAutomation	Softome

5) From the menu select Uninstall



6) From the dialog box press Yes



7) ProperSync will be uninstalled from the system

Windows XP Users

- 1) Close Microsoft Outlook
- 2) From the Start Menu select Control Panel



3) From the Control Panel select Add or Remove Programs

🦻 Control Panel			
File Edit View Favorites Tools	Help		
🕞 Back 🔹 🕥 🔹 🏂 🔎 S	earch 🝺 Fold	ers 🛄 🔻	Folder Syr
Address 🚱 Control Panel			
Control Panel 🔊	Ŵ	K	-
Switch to Category View	Add Hardware	Add or Remove Programs	Administrative Tools
See Also		`	
🍓 Windows Update	Fonts	Game Controllers	Internet Options
Help and Support	1		۹.

4) From the Add or Remove Programs windows select ProperSync and press Remove

🐻 Add or Re	move Programs			
5	Currently installed programs:	Show up <u>d</u> ates	Sort by: Name	*
C <u>h</u> ange or Remove	Microsoft .NET Framework 2.0 Service Pack 2		Size	184.00MB
Programs	🙀 Microsoft .NET Framework 3.0 Service Pack 2		Size	168.00MB
	🕞 Microsoft .NET Framework 3.5 SP1		Size	31.52MB
Add New	😫 Microsoft Office Enterprise 2007		Size	628.00MB
Programs	😫 Microsoft Save as PDF or XPS Add-in for 2007 Microsoft	Office programs	Size	0.13MB
	📑 MSXML 6.0 Parser (KB925673)		Size	1.46MB
Add/Remove	f ProperSync		Size	<u>29.55MB</u>
<u>W</u> indows	Click here for support information.		Used	<u>rarely</u>
Components	To change this program or remove it from your compute	r, click Change or Remove.	Change	Remove
	🟉 Windows Internet Explorer 8		Size	4.30MB
Set Pr <u>o</u> gram Access and Defaults	🔀 Windows XP Service Pack 3			

5) From the dialog box press **Yes**



6) ProperSync will be uninstalled from the machine

Basics

Manage Outlook & SharePoint Connections

Users with Microsoft Outlook can attach any SharePoint calendar or task list they have permission to see. This is a simple client side operation that brings the functionality of SharePoint directly to your desktop.

Why connect SharePoint calendars and tasks to your Outlook client?

- > Reminders on team events from team calendars in SharePoint
- SharePoint tasks appear in the Outlook to-do list
- Reminders on tasks from SharePoint tasks lists
- Bring your SharePoint calendars and tasks offline
- View/Update your team calendars directly from Outlook, no need to open a browser
- > Drag and drop calendar items
- > Copy items to your personal calendar

Connect a SharePoint 2007 or 2010 List to Microsoft Outlook

To connect a SharePoint calendar or task list to Microsoft Outlook

- 1. Open a web browser and browse to your SharePoint calendar
- 2. Copy the entire URL from the browser address bar (including the .aspx page)

🏉 Calendar - Windows I	Internet Explorer
	sion/publicdemo/Lists/Calendar/calendar.asp>
🖕 Favorites 🛛 🚖 🔏	Undo
Charles 1	Cut
Calendar	Сору
channelmatter > Public De	Paste
💕 Public Dem	Delete
Home	Select All
	Right to left Reading order
	Show Unicode control characters
₹ 2011	Insert Unicode control character
Jan Feb Ma	On an IME
Apr May Ju	Open IME
Jul Aug Sej	Reconversion
Oct New Dec	

- 3. Open Microsoft Outlook, browse to your calendar.
- 4. Right click on Calendar and choose New Calendar from the context menu

My Calendars			9 00	
Other Calenda			New <u>W</u> ind	ow
	Mew Cale			
	Hide This		Calendar	
	÷.	<u>O</u> verlay		
		Color		

5. Give the new calendar a name (e.g. Team Calendar). Press **OK**.

Create New Folder
Name:
Team Calendar
Eolder contains:
Calendar Items 🔹
Select where to place the folder:
a 🗳 Outlook Data File 🔹
🖾 Inbox
🖗 Drafts
🔄 Sent Items 🗧
Deleted Items
🛄 Calendar
See Contacts
Journal 🔤
🧑 Junk E-mail
Noter T
OK Cancel

6. Right click on the new calendar (e.g. Team Calendar) and select Add ProperSync source...



7. Paste the URL in to the **Add Source** box

🖳 Add Source				
Enter the URL to the Alternatively, drag-a	e SharePo nd-drop th	int li e UF	st below and hit add. RL from the browser location bar.	ile G
			Undo	
Add			Copy Paste	
2 3 4 5 6	90		Delete Select All	
Calendar Team Calendar	10 ⁰		Right to left Reading order Show Unicode control characters	ŀ
ther Calendars	110		Insert Unicode control character Open IME	
	12 P		Reconversion	t

8. Press Add

🖳 Add Source	—			
Enter the URL to the SharePoint list below and hit add. Alternatively, drag-and-drop the URL from the browser loc	ation bar.			
https://channelmatter1microsoftonlinecom- 1.sharepoint.microsoftonline.com/cmsoftwaredivision/publicde mo/Lists/Calendar/calendar.aspx				
Add				

9. Choose the sync option for the list

🖳 Source Settings	s 💌			
Source Title: Web URL: List GUID:	Calendar m-1.sharepoint.microsoftonline.com/cmsoftwaredivision/publicdemo {2bf8f07e-05fd-4370-ac9b-cdf35aafc269}			
Schema Download	ded Never Update Schema			
Sync Options for	r Folder			
Download A	All Items (Full Sync)			
Allow Addin	g New Items Locally			
Automa	atically add new items - will not prompt.			
Care should be taken in Mixed Mode folders to avoid accidently exposin information.				
Upload only	y Free Busy (Calendar Only)			
	OK <u>C</u> ancel			

10. Press OK

The following steps can be used for Tasks and Contacts as well. Simply browse to your task or contact list in a web browser, copy the link, switch to your Outlook task or contact area and follow the steps above.

Remove Connection to a SharePoint List

To remove a connection to a SharePoint list:

- 1) Right click on the Outlook folder, in which the connection should be removed
- 2) Click on **Properties** in the context menu



3) Click on the ProperSync tab in the window that appears

PS Travel Calendar O365 Properties	×
General Home Page AutoArchive Permissions ProperSync Synchronizat	ion
Connections:	
Team Travel	
Remove Settings Add Connection	
ProperSync Settings	
OK Cancel A	vlaa
	PP1

- 4) Select the connection to remove
- 5) Press **Remove** to remove the connection
- 6) Press **OK** to save the settings

Modify a Connection on an Outlook folder

To modify a current connection on an Outlook folder:

- 1) Right click on the Outlook folder, in which the connection should be removed
- 2) Click on Properties in the context menu



3) Click on the ProperSync tab in the window that appears

S Travel C	Calendar O36	5 Properties				×
General	Home Page	AutoArchive	Permissions	ProperSync	Synchronization	
Connec	tions:					
Team	Travel					
Re	emove	Settings	Ad	d Connection		
F	ronerSync Se	ttings				
	ropersyne se					
			OK	Can	-al Analy	_
					Apply	_

4) Select the connect to modify then press Settings

a.

5) In the Settings dialog box, modify the settings, then press OK

Source Title:	Team Travel	
Web URL:	http://propersync.sharepoint.com	m/TeamSite/Administration
List GUID:	{67811714-b3cd-4bc6-97ac-282	256ce3c44d}
Schema Downlo	aded Never	Update Schema
-Sync Options	for Folder	
Download	All Items (Full Sync)	
Allow Add	ing New Items Locally	
🗸 Autor	natically add new items - will not p	prompt.
Care	should be taken in Mixed Mode fo nation.	olders to avoid accidently expos
	alu Eree Buku (Calendar Onlu)	
Upload of	ny mee busy (calendar only)	

6) Press **OK** in the Properties dialog box to save the settings

Viewing ProperSync Fields in Outlook

a.

To view the custom columns on a SharePoint list, simply open a task or appointment from a SharePoint list, after ProperSync has been installed.

ProperSync pane in an appointment item:

📰 🖬 🤊	(≌ 🍲 🔶 ╤	-	Untitled	- Event				x
File	Event Insert	Format Text	Review					⊘ ⊘
Subject:						🛃 ProperSync Fi	elds	»
Location:					-	Client Name:		-
Start time:	Wed 3/16/2011	-	12:00 AM 👻	🔽 All day eve	nt	Deliverable Name:		-
End time:	Wed 3/16/2011		12:00 AM]		Project Name:		•
					5			
L. Chanad E	- Islan III Daaraa		Color day					
In Shared Fo	older: Ha Prope	rsync - Example Te	am calendar					

ProperSync pane in a task item:

💐 🔒 🤊 (* 🍝	⇒ ∓		N .:	Untitled - Task	1	
File Task	Insert	Format Text	Review		_	⊘ ⊘
Assigned To						🛃 ProperSync Fields 🛛 »
Subject:						Project Name:
Start date:	None		 Status: 	Not Started	-	•
Due date:	None		Priority:	Normal 🔹 % Complete: 0%	×	# of Hours Remaining:
Reminder:	None		None			Level of Difficulty:
					2	•
	a					
In Shared Folder:	A Propers	Sync - Example Ta	sk List			

Supported ProperSync Field Types

The ProperSync 1.3 supports the following field types:

- Single Line of Text
- Multiple Lines of Text (Plain Text)
- Choice (Drop Down)
- Choice (Radio Buttons)
- Choice (Checkboxes)
- Number
- Number (Percentage)
- Currency
- > Lookup
- > Date/Time
- User & Groups Users Only
- Calculated Columns

Required Fields in Outlook

ProperSync will enforce required fields within the Outlook item. Required fields are indicated with a red text. If a user tries to save the item without filling out the required information ProperSync will alert the user of the required fields.

Required fields in the ProperSync Pane:



ProperSync prompt for missing fields:

Required f	ield information missing
4	One or more required fields are missing or some values are invalid. Valid values must be supplied before the item can be saved. Invalid fields: Deliverable Name and Estimated Work in Hours
	ОК

Note: ProperSync only enforces the required fields that appear in Outlook. The fields that appear in Outlook can be controlled by list administrators. If a list administrator hides a required field from ProperSync, ProperSync cannot enforce the field. To control which fields are provided to ProperSync, refer to <u>Controlling Fields in Outlook</u>, later in this documentation.

Customizing ProperSync

Sync Options Explained

There are a few different sync options available for ProperSync 1.3. Please see the definitions below:

- Download All Items (Full Sync)
 - Checking this box will download all items from the SharePoint list. Modifications made to those items will be updated in SharePoint. The new item must exist in SharePoint, new Outlook items will not be updated in this mode
- Allow Adding New Items Locally
 - This allows users to publish some or all of their items to the SharePoint list. To publish to the connected SharePoint list, open the item and click on the **Link To Remote** button in the ribbon.
- > Automatically add new items will not prompt.
 - This will sync all items on your calendar with SharePoint. All the information will be show in the list.

Example Sync Scenarios

- Only download SharePoint Items
 - Check Download All Items (Full Sync) only
- Only upload some of my items
 - Check Allow Adding New Items Locally only
- > Only upload all my items
 - Check both Allow Adding New Items Locally & Automatically add new items will not prompt
- Synchronize my entire calendar with SharePoint
 - Check all boxes

Controlling Fields in Outlook

There are two ways to control what fields are displayed on the ProperSync pane within Outlook. For each connected list, one of these approaches can be taken to control the ProperSync fields.

Without any customizations, ProperSync will refer to the default view on the SharePoint list. ProperSync will show the selected columns in the order provided by the view.

List administrators have the option of creating a special view for ProperSync. If a list has a view with the term "[propersync]" (including square brackets) in the name, ProperSync will use that view instead of the default view on the list.

Notes:

- > All users connected to the list with ProperSync will see the same fields
- Updates to the list view will propagate to all users within ten minutes of the change (users must be online)

- ProperSync only shows custom fields on a list. Default columns will be ignored, as they are already in the Outlook form
- ProperSync only supports the selected columns and column order on a view. It does not currently support any other properties of the view (e.g. sort, filter, etc...). Future updates will improve upon this functionality

Using the Default View of the List

SharePoint 2007

- 1) Open a web browser and browse to the SharePoint list
- 2) From the **Settings** menu, select **List Settings** (if the settings menu is not present, the current user does not have correct permission to the list)

ProperSync > Example Team Calendar Example Team Calendar					
New • Actions •	Settings	•			
← → March, 201: Sunday 27	ini Tõ	Cre Add infor Crea filter	ate Column a column to store additional mation about each item. ate View ate a view to select columns, rs, and other display settings.		
		List Man colu	Settings age settings such as permissions, mns, views, and policy.		

3) Scroll to the bottom of the page to see the Views on the list. The default view will be indicated with a checkmark

Views					
A view of a list allows you to see a particular selection of items or to see the items sorted in a particular order. Views currently configured for this list:					
View (dick to edit)	Default View				
All Events	✓				
Calendar					

4) Click on the default view to see the selected columns

□ Columns						
Select or dear the check box next to each	Display	Column Name	Posit	ion f	rom	ı Left
To specify the order of the columns, select a	V	Recurrence		1	•	
number in the Position from left box.	\checkmark	Attachments		2	•	
	V	Workspace		3	•	
		Title (linked to item with edit menu)		4	•	
	V	Location		5	•	
	V	Start Time		6	•	
	V	End Time		7	•	
	V	All Day Event		8	•	
	V	Modified		9	•	
	V	Modified By		10	•	
	V	Client Name		11	•	
		Content Type		12	•	
		Created		13	•	
		Created By		14	•	
		Deliverable Name		15	•	
		Description		16	•	
		Edit (link to edit item)		17	•	
		ID		18	•	
		Project Name		19	•	

- 5) The columns that are checked are the columns in the view. Any custom columns selected will appear in the ProperSync pane, in the order specified.
- 6) Update and press **OK** to save the view.

SharePoint 2010

- 1) Open a web browser and browse to the SharePoint list
- 2) Select List (or Calendar) tab from the SharePoint ribbon



4) Scroll to the bottom of the page to see the Views on the list. The default view will be indicated with a checkmark

Views		
A view of a list allows you to see a particular selection	of items or to see the items sorted in a particular order. Views currently configured for this lis	:t:
View (click to edit)	Default View	
All Events	✓	
Calendar		

5) Click on the default view to see the selected columns

Т

🗆 Columns			
Select or clear the check box next to each	Display	Column Name	Position from Left
To specify the order of the columns, select a	V	Recurrence	1 🔻
number in the Position from left box.	v	Attachments	2 🔻
	V	Workspace	3 🔻
	V	Title (linked to item with edit menu)	4 🔻
	V	Location	5 🔻
	V	Start Time	6 🔻
	V	End Time	7 🔻
	v	All Day Event	8 🔻
	V	Modified	9 🔻
	V	Modified By	10 🔻
	V	Client Name	11 🔻
		Content Type	12 🔻
		Created	13 🔻
		Created By	14 🔻
		Deliverable Name	15 🔻
		Description	16 🔻
		Edit (link to edit item)	17 🔻
		ID	18 🔻
		Project Name	19 🔻

- 6) The columns that are checked are the columns in the view. Any custom columns selected will appear in the ProperSync pane, in the order specified.
- 7) Update and press **OK** to save the view.

Creating a [propersync] View

SharePoint 2007

- 1) Open a web browser and browse to the SharePoint list
- 2) From the **Settings** menu, select **Create View** (if the settings menu is not present, the current user does not have correct permission to the list)

ProperSync > Example Team Calendar Example Team Calendar				
New 🝷	Actions •	Setting	s 🔻	
€ • ∅	Example		Create Column Add a column to store additional information about each item.	
	Example 2	ΠČ	Create View Create a view to select columns, filters, and other display settings.	
	Example 3 sample		List Settings Manage settings such as permissions, columns, views, and policy.	

3) From the Choose a view format list, select Standard View



4) Give the view any name, but make sure to include the term "[propersync]" (including square brackets)

ProperSync > Example Team Calendar > Settings > Create View: Example Tean	> Create View n Calendar	
Use this page to create a view of this list.		OK Cancel
Name Type a name for this view of the list. Make the name descriptive, such as "Sorted by Author", so that site visitors will know what to expect when they click this link.	View Name: [propersync] fields Make this the default view (Applies to public views only)	

5) Check the columns to appear on the ProperSync pane. Reminder: ProperSync will only show custom columns on the list. Any selected standard columns will be ignored.

∃ Columns			
Select or clear the check box next to each column you	Display	Column Name	Position from Left
the columns, select a number in the Position from left		Recurrence	1 🔻
box.		Attachments	2 🔻
		Workspace	3 🔻
		Title (linked to item with edit menu)	4 🔻
		Location	5 💌
		Start Time	6 🔻
		End Time	7 🔻
		All Day Event	8 🔻
	v	Client Name	9 🔻
		Content Type	10 🔻
		Created	11 🔻
		Created By	12 🔻
	v	Deliverable Name	13 🔻
		Description	14 🔻
		Edit (link to edit item)	15 🔻
		ID	16 🔻
		Modified	17 🔻
		Modified By	18 🔻
	v	Project Name	19 🔻

6) Select the order in which you would like the columns to appear on the ProperSync pane

⊟ Columns			
Select or clear the check box next to each column you	Display	Column Name	Position from Left
the columns, select a number in the Position from left		Recurrence	4 🔻
box.		Attachments	5 🔻
		Workspace	6 🔻
		Title (linked to item with edit menu)	7 🔻
		Location	8 🔻
		Start Time	9 🔻
		End Time	10 🔻
		All Day Event	11 🔻
	V	Client Name	1 💌
		Content Type	1
		Created	3
		Created By	5
	v	Deliverable Name	7
			8

7) Press **OK** to save the list view

SharePoint 2010

- 1) Open a web browser and browse to the SharePoint list
- 2) Select List (or Calendar) tab from the SharePoint ribbon



			Calendar Tools	
Site Actions 👻	2	Browse	Events	Calendar

3) In the Manage Views section, click on Create View



4) From the Choose a view format list, select Standard View



5) Give the view any name, but make sure to include the term "[propersync]" (including square brackets)

		OK Cancel
Name	View Name:	
Type a name for this view of the list. Make the name descriptive, such as "Sorted by Author", so that site visitors will know what to expect when they click this link.	[propersync] fields Make this the default view (Applies to public views only)	

6) Check the columns to appear on the ProperSync pane. Reminder: ProperSync will only show custom columns on the list. Any selected standard columns will be ignored.

∃ Columns				
Select or clear the check box next to each column you	Display	Column Name	Position from Le	ft
the columns, select a number in the Position from left		Recurrence	1 🔻	
box.		Attachments	2 🔻	
		Workspace	3 🔻	
		Title (linked to item with edit menu)	4 🔻	
		Location	5 🔻	
		Start Time	6 🔻	
		End Time	7 🔻	
		All Day Event	8 🔻	
	\checkmark	Client Name	9 🔻	
		Content Type	10 🔻	
		Created	11 🔻	
		Created By	12 🔻	
		Deliverable Name	13 🔻	
		Description	14 🔻	
		Edit (link to edit item)	15 🔻	
		ID	16 🔻	
		Modified	17 🔻	
		Modified By	18 🔻	
		Project Name	19 🔻	

7) Select the order in which you would like the columns to appear on the ProperSync pane

Columns			
Select or clear the check box next to each column you	Display	Column Name	Position from Left
want to show or hide in this view. To specify the order of the columns, select a number in the Position from left		Recurrence	4 🔻
box.		Attachments	5 🔻
		Workspace	6 🔻
		Title (linked to item with edit menu)	7 🔻
		Location	8 🔻
		Start Time	9 🔻
		End Time	10 🔻
		All Day Event	11 🔻
	\checkmark	Client Name	1 💌
		Content Type	1 2
		Created	3
		Created By	5
	V	Deliverable Name	7
			8

8) Press OK to save the list view

ProperSync Options

Enabling Logging

a.

Outlook 2007

- 1) Open Microsoft Outlook 2007
- 2) From the **Tools** menu select **Options**

<u>T</u> oo	Tools Actions Help					
	Send/Receive					
	Instant Search					
	Address <u>B</u> ook Ctrl+Shift+B	1				
	Organi <u>z</u> e					
	Mailbo <u>x</u> Cleanup	1				
۵	Empty "Deleted Items" Folder					
	Eorms +					
	Macro +					
	Account Settings	1				
	Tru <u>s</u> t Center					
	<u>C</u> ustomize					
	<u>O</u> ptions					

- 3) From the **Options** dialog box select the **ProperSync** tab
- 4) From the **ProperSync** tab use the **Log Level** dropdown to choose the type of logging you require.



5) Once the logging level has been set, press OK to apply the settings

Outlook 2010

- 1) Open Microsoft Outlook 2010
- 2) Click on the File button



3) From the File menu select Options



4) From the **Options** dialog box select **Add-ins**

Outlook Options
General
Mail
Calendar
Contacts
Tasks
Notes and Journal
Search
Mobile
Language
Advanced
Customize Ribbon
Quick Access Toolbar
Add-Ins
Trust Center

5) From the Add-ins sections select **Add-in Options...**

View and manage Microsoft Office Add-ins.	
Add-in Options	
Launch Add-in options dialog: Add-in Options	
Add-ins	
Name 🔺	

- 6) From the **Add-ins Options** dialog box select the **ProperSync** tab
- 7) From the **ProperSync** tab use the **Log Level** dropdown to choose the type of logging you require.

Propersync (Ceptara Organizer
Licensing Inf	formation
Diagnostics	() i
Log Level:	All
Log Level:	All Off Critical
Log Level:	All Off Critical Error Warning Universities

8) Once the logging level has been set, press **OK** to apply the settings

Updating/Changing Activation Key

Outlook 2007

- 8) Open Microsoft Outlook 2007
- 9) From the Tools menu select Options



- 10) From the Options dialog box select the ProperSync tab
- 11) From the ProperSync tab select View License Details

(Options						
	Preferences	Mail Setup	Mail Format	Spelling	Other	Propersync	
	Licensing Information						
	View License Details						

12) The **ProperSync Activation** window will open. Enter the new or updated **license key** in the **Activation/License Key** box, then press **Activate**.

	1	×				
To activate your ProperSync license, enter your Activation Key in the field below. If you have an existing valid License Key, you may enter it instead. An internet connection is required for activation.						
This license is only valid for one user account. Verify the License Account field below is correct before activating.						
Activation/License Key:	[危				
License Account:	CWINSNES\carsten					
Effective License Key:						
License Features:						
Clear License Key	Activate Close					

13) Once the key is properly activated, a response will be appear in the blank space



14) Click **Close** to close the **ProperSync Activation** dialog box

Outlook 2010

- 11) Open Microsoft Outlook 2010
- 12) Click on the File button



13) From the **File** menu select **Options**

01	2.117	
File	Home	Send
🔝 Sav	ve As	
🖳 Sav	ve Attachme	ents
Info		<
Open		
Print		
Help		
Dp	tions	
🔀 Exi	t	

14) From the Options dialog box select Add-ins

15) From the Add-ins sections select Add-in Options...

:	View and manag	e Micro	osoft Office Add-ins
\dd-in	Options		
Launo	h Add-in options di	ialog:	Add-in <u>O</u> ptions
\dd-in	5		

- 16) From the Add-ins Options dialog box select the ProperSync tab
- 17) From the ProperSync tab press the View License Details button

Add-in Option	s	No Char this week
Propersync	Ceptara Organizer	
Licensing In	formation	
		View License Details

18) The **ProperSync Activation** window will open. Enter the new or updated **license key** in the **Activation/License Key** box, then press **Activate**.

🖳 ProperSync Activation	ı	×			
To activate your ProperSync license, enter your Activation Key in the field below. If you have an existing valid License Key, you may enter it instead. An internet connection is required for activation.					
This license is only valid for one user account. Verify the License Account field below is correct before activating.					
Activation/License Key:	[2			
License Account:	CWINSNES\carsten				
Effective License Key:					
License Features:					
Clear License Key	Activate Close				

19) Once the key is properly activated, a response will be appear in the blank space



20) Click Close to close the ProperSync Activation dialog box