

ProperSync 1.2 User Manual

Rev 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 Discussion Boards
- SharePoint Contacts

What's new in ProperSync 1.2

- ProperSync Grid View
- Custom "[propersync]" views on SharePoint lists
- Performance Enhancements
- SharePoint Contact Item Support

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

ProperSync	
Welcome to the ProperSync Setup Wiza	rd 🍡
The installer will guide you through the steps required to install Prope	erSync on your computer.
WARNING: This computer program is protected by copyright law an Unauthorized duplication or distribution of this program, or any portion or criminal penalties, and will be prosecuted to the maximum extent p	d international treaties. n of it, may result in severe civil oossible under the law.
Cancel	< Back 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 lic Agree'', then ''Next''. Otherwise click	ense agreement now. If you a ''Cancel''.	accept the terms below, click "I
electronic documenta installing, copying, PRODUCT, you agree t EULA. This license a agreement concerning Channelmatter Inc., supersedes any prior understanding betwee to the terms of this	tion ("SOFTWARE P or otherwise usi to be bound by the greement represen the program betw (referred to as " proposal, repres in the parties. If EULA, do not ins	RODUCT"). By ng the SOFTWARE terms of this ts the entire een you and licenser"), and it entation, or you do not agree tall or use the
🔘 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**

谩 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 belo	w 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

授 ProperSync	
Confirm Installation	
The installer is ready to install ProperSync on your computer.	
Click "Next" to start the installation.	
Cancel < Bac	× 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

闄 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 I	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 <u>activate now</u> .				
Client Name:	•			

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	l foron e user account. Verify 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



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

Too	s <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
	Forms
	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 License Details						

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. Verify the License Account fie activating.	ld .		
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.
N	
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

		a
File	Home	Send
<u> Save</u>	e As	
Dave Save	e Attachme	nts
Info		
Open		
Print		
Help		
📑 Opt	ions	
🔀 Exit		

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 Mic	rosoft Office Add-ins.
Add-ir	Options		
Laun	ch Add-in oj	ptions dialog:	Add-in Options
dd-ir	15		

- 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 used
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**.

Real ProperSync Activation		
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 fiel activating.	ы
Activation/License Key:	[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 n	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	
Microsoft Online Services Sign In	
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



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	B Microsoft Save as PDF or XPS Add-in for 2007 Microsoft Office	e programs	Size	0.13MB
Add/Remove <u>Wi</u> ndows Components	📑 MSXML 6.0 Parser (KB925673)		Size	1.46MB
	🔂 ProperSync		Size	<u>29.55MB</u>
	Click here for support information.		Used	<u>rarely</u>
	To change this program or remove it from your computer, click	k 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

Connecting SharePoint lists to Outlook

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

a.

> Copy items to your personal calendar

Connect a SharePoint 2007 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 List
- 2) From the Actions menu select Connect to Outlook (or Connect to Client)



3) When prompted by Internet Explorer press OK to connect the list

Internet E	xplorer
0	Do you want to allow this website to open a program on your computer?
	From: www.propersync.com
	Program: Microsoft Outlook
	Address: stssync://sts/? ver=1.1&type=calendar&cmd=add- +
	✓ Always ask before opening this type of address
	Allow Cancel
?	Allowing web content to open a program can be useful, but it can potentially ham your computer. Do not allow it unless you trust the source of the content. <u>What's the risk?</u>

4) When prompted by Outlook click Yes

Microso	ft Outlook
	Connect this SharePoint Task List to Outlook?
u	You should only connect lists from sources you know and trust.
	ProperSync Team Site - Test Tasks
	http://propersync.sharepoint.com/TeamSite/Lists/Test Tasks/
	To configure this Task List, click Advanced.
	Advanced Yes No

5) The SharePoint list will be connected to Outlook. Calendars appear underneath your current calendar and tasks under the tasks section

	y t
4 📝 My Calendars	Ż
Calendar	
✓ ✓ Other Calendars	
ProperSync - Example Team Calendar	
	15
	18
	1

6) The list is now ready to use online or offline. Outlook will synchronize with SharePoint approximately every five minutes to check for updates.

Connect a SharePoint 2010 List to Microsoft Outlook

a.

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



			Calen	dar Tools	
Site Actions 👻 [2	Browse	Events	Calendar	

3) In the Connect & Export section of the List (or Calendar) tab, press Connect to Outlook



Internet E	xplorer 📃
0	Do you want to allow this website to open a program on your computer?
	From: www.propersync.com
	Program: Microsoft Outlook
	Address: stssync://sts/? ver=1.1&xtype=calendar&cmd=add-
	V Always ask before opening this type of address
	Allow Cancel
?	Allowing web content to open a program can be useful, but it can potentially harm your computer. Do not allow it unless you trust the source of the content. What's the risk?

5) When prompted by Outlook click Yes



6) The SharePoint list will be connected to Outlook. Calendars appear underneath your current calendar and tasks under the tasks section



7) The list is now ready to use online or offline. Outlook will synchronize with SharePoint approximately every five minutes to check for updates.

For more information on SharePoint and Outlook integration:

http://office.microsoft.com/en-us/outlook-help/view-and-create-tasks-on-a-sharepoint-site-by-usingoutlook-HA010082030.aspx

http://sharepoint.microsoft.com/Blogs/GetThePoint/Lists/Posts/Post.aspx?ID=73

Viewing ProperSync Fields in Outlook

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:

🗐 🖬 🤊	(° 4 4	- -		Unti	tled -	Event				
File	Event	Insert	Format Tex	t Review						∞ 😮
Subject:								🛃 ProperSync Fi	elds	»
Location:							-	Client Name:		•
Start time:	Wed 3/16	/2011	•	12:00 AM	-	📝 All day ever	nt	Deliverable Name:		•
End time:	Wed 3/16	/2011	•	12:00 AM	•		_	Project Name:		-
In Shared Fo	older: 📕	ProperSyn	c - Example	Team Calendar						
	- Company						_			

ProperSync pane in a task item:

2	⇒ ∓	- /	N :	Untitled - Task	(6)	- 2	
File Task	Insert	Format Text	Review			_	♡ ?
Assigned To							ProperSync Fields >>
Subject:							Project Name:
Start date:	None		▼ Status:	Not Started		-	•
Due date:	None		 Priority: 	Normal 👻 % Cor	mplete: 0%	-	# of Hours Remaining:
Reminder:	None	•	None	-			Level of Difficulty:
							•
In Shared Folder:	Propers	ync - Example Ta	<u>sk list</u>				

Tasks can also be seen in the ProperSync grid view:

4	💠 🛃 ProperSync Grid View 🔹									
	Only show items selected in Folder View Refresh								Refresh	
				Drag	a column h	ere to group b	y this column			
	S Subject Assigned To Start Date Due Date Status % Complete Priority Project Name # of Ho						# of Hours R			
	7	Contains: 🍸	Contains: 🍸	Equal: 🖓	Equal: 🖓	Contains: 🍸	Equal: 🛛 🍸	Contains: 🍸	Contains: 🔻	Equal:
+		Demo Task			11/4/2010	In Progress	13%	Low	Project 2	
		Demo Task 2				Not Started	0%	Low	Project 2	
		Demo Task 3	demo	3/19/2011	3/22/2011	Not Started		Low	Project 4	

For more on the ProperSync Grid view, refer to <u>Using the ProperSync Grid View</u>, later in this documentation.

Supported ProperSync Field Types

The ProperSync 1.2 supports the following field types:

- Single Line of Text
- Multiple Lines of Text (Plain Text)
- Choice (Drop Down)
- Choice (Radio Buttons)
- > Number
- Number (Percentage)
- Currency
- Lookup
- Date/Time (v 1.1)
- User & Groups Users Only (v 1.1)
- Calculated Columns (v 1.1)

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 Fields
Deliverable Name*:
•
Estimated Work in Hours*:

ProperSync prompt for missing fields:



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

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 •	Setting	s •			
 ← → March, 201 Sunday 27 		Create Column Add a column to store additional information about each item. Create View Create a view to select columns, filters, and other display settings.			
	T	List Settings Manage settings such as permissions, columns, 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	election 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 clear the check box next to each	Display	Column Name	Position from Left
	To specify the order of the columns, select a	1	Recurrence	1 🔻
	number in the Position from left box.	V	Attachments	2 🔻
		1	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 🔻

- 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

Site Actions 👻 😭	Browse	List Too Items	ols List	
Site Actions 👻 😭	Browse	Calen Events	dar Tools Calenc	dar

3) In the Settings section, click on List Settings



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	n of items or to see the items sorted in a particular order. Views currently configured for this list:
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
column you want to show or hide in this view. To specify the order of the columns, select a	1	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 🔻
	1	Start Time	6 🔻
	v	End Time	7 🔻
	v	All Day Event	8 🔻
	1	Modified	9 🔻
	v	Modified By	10 🔻
	1	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 🔻
mos that are checked are the colu	mnc in th	o viow. Any custom columns colo	stod will

- 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)

ProperSyn Exam	c > Example ple Tea	Team C	Calendar Calendar
New 🝷	Actions •	Setting	5 -
€ 0	Title 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 Team	> 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	2
		Created	3
		Created By	5
	V	Deliverable Name	7
l de la constante de	_		0

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



			Calen	dar 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
A DATE OF A	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)	

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 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 🔻
		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 I
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 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**



- 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 A	

- 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.

Add-in Option	S / No police ili
Propersync	Ceptara Organizer
Licensing In	nformation
Diagnostics	s (Logging may reduce perform
LUG LEVEI.	Off Critical

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

C)ptions						
	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**.

🖳 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 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					

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

012		
File	Home	Send
🔣 Save	e As	
Para Save	e Attachme	nts
Info		K
Open		
Print		
Help		
📑 Opt	ions	
🔀 Exit		

14) 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						

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

:	View and mar	nage Micr	osoft Office Add-ins.
\dd-ir	Options		
Laun	ch Add-in optior	ns dialog:	Add-in Options
dd-ir	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 Options	No Charl Will wood
Propersync Ceptara Organizer	
Licensing Information	
	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

Using the ProperSync Grid View

The ProperSync Grid view allows users to view SharePoint tasks in a gird format. This is useful for grouping, sorting and filtering tasks.

To access the ProperSync grid view:

- 1) Click on a SharePoint Task List within Microsoft Outlook
- 2) Immediately above the tasks a blue bar with the text Folder View will appear

+ ¢	Folder View	
0 🗹	Subject	Due Date 🔍
	Click here to add a new Task	
2 🗆	Demo Task 3	Tue 3/22/2011
2 🗆	Demo Task	Thu 11/4/2010
2 🗆	Demo Task 2	None

3) Click on the symbol to access the ProperSync grid view

Sorting Fields

To sort items within the ProperSync grid view, simply click on the column heading. For example, to sort on Project Name, click on the Project Name header in the grid view:

Drag a column here to group by this column.								
Subject	Assigned To	Start Date	Due Date	Status	% Complete	Priority	Project Name	# of Hours R

Clicking on the heading item again will sort the same field in the other direction. The first time a user clicks on the column heading, the items will be sorted from A-Z. The second time a user clicks on the same column heading, the items will be sorted from Z-A.

First click (Sorted by Project Name A-Z):

Subject	Assigned To	Start Date	Due Date	Status	% Complete	Priority	Project Name	# (
Contains: 🍸	Contains: 🍸	Equal: 🍸	Equal: 🝸	Contains: 🍸	Equal: 🛛 🍸	Contains: 🍸	Contains: 🔻	Equ
Demo Task			11/4/2010	In Progress	13%	Normal	Project 2	
Demo Task 2				Not Started	0%	Low	Project 2	
Demo Task 3	demo	3/19/20	3/22/2011	Not Started		Low	Project 4	

Second click (Sorted by Project Name Z-A):

Subject	Assigned To	Start Date	Due Date	Status	% Complete	Priority	Project Name
Contains: 🍸	Contains: 🍸	Equal: 🍸	Equal: 🍸	Contains: 🍸	Equal: 🛛 🍸	Contains: 🍸	Contains: 🔻
Demo Task 3	demo	3/19/20	3/22/2011	Not Started		Low	Project 4
Demo Task			11/4/2010	In Progress	13%	Normal	Project 2
Demo Task 2				Not Started	0%	Low	Project 2

Grouping Fields

To group items within the ProperSync grid view, simply drag the column header in to the section above the grid, which reads **Drag a column here to group by this column.**

Drag a column here to group by this column.						
e	Due Date	Status	% Complete	Priority	Project Name	

After dragging a column header to this location, the items within the grid will be grouped by the column:

	Drag a columr	here to grou	p by this (Broje	not Name	
te	Status	% Complete	Priorit	ty	Project Name	# of Ho
7	Contains: 💎	Equal: 💎	Contains:	7	Contains: 🔻	Equal:
10	In Progress	13%	Normal		Project 2	
	Not Started	0%	Low		Project 2	
1	Not Started		Low		Project 4	

G	Group by: Project Name 🗵																			
			s	Subject	t	Assigned	То	Start D	ate	Due D	ate	Status		% Com	plete	Priority	/	Project Na	me	#
+	•		7	Contains:	Y	Contains:	Y	Equal:	7	Equal:	7	Contains:	7	Equal:	7	Contains:	7	Contains:	∇	Ec
		*	Pro	oject Name	e: Pr	oject 2														
		*	Project Name: Project 4																	

Click the symbol to expand the items in the group:

Gro	Group by: Project Name 🗷											
		s	Subject	Assigned To	Start Date	Due Date	Status	% Complete	Priority	Project Name	# 0'	
		7	Contains: 🍸	Contains: 💎	Equal: 🝸	Equal: 🝸	Contains: 🍸	Equal: 🛛 🏹	Contains: 🍸	Contains: 🔻	Equ	
 Project Name: Project 2 												
			Demo Task			11/4/2010	In Progress	13%	Normal	Project 2		
			Demo Task 2				Not Started	0%	Low	Project 2		
Project Name: Project 4												
			Demo Task 3	demo	3/19/20	3/22/2011	Not Started		Low	Project 4		

Click the symbol to collapse the group:

Group by: Project Name 🗵															
		s	Subjec	t	Assigned	То	Start D	Date	Due D	ate	Status		% Com	plete	Prior
		7	Contains:	Y	Contains:	V	Equal:	Y	Equal:	V	Contains:	7	Equal:	7	Contain
+	*	Pr	oject Nam	e: Pr	oject 2										
	^	Pr	oject Nam	e: Pr	oject 4										
			Demo Ta	sk 3	demo		3/19/2	0	3/22/2	011	Not Starte	d			Low

The items in the grid can be grouped by any available field. The items can also be grouped by more than one field. Simply drag additional column headers to group the items by the additional headers.

Drag in to the current Group By item to group by both fields:

	Only show items selected in Folder View											
	Gro	oup I	by:	Projesti (Nami	ex							
	S Subject Assigned To Start Date											
			70	ontains: 🖓	Contains: 🕅	Foual: 🖓						
_												
G	Froup by: Project Name 🗵 🔶 Assigned To 🗵											
H	_		-		A							

Drag outside the current Group By item to create sub groups within the current group:

Gro	oup I	oy:	Project Name	e 🗵	Assign	ned To					
		s	Subject	Assign	ned To	Start Date	Due Date				
		ļ									
Group by: Project Name Assigned To X											

Filtering Fields

The following items cannot be filtered in ProperSync:

- Choice (Drop Down)
- Choice (Radio Buttons)
- Lookup

Future ProperSync updates will allow filtering on additional fields.

To filter items in the ProperSync grid view, use the row directly below the column headers:



Click on the 🝸 symbol to choose the filtering option:

Priority	/	Project Name	# of Hours Re						
Contains:	7	Contains: 🔻	Equal:						
Normal		No filter							
Low		Contains							
Low		Does not cont	ain						
		Starts with							
		Ends with							
		Equals							
		Not equal to							
		Is null							
		Is not null							
		Custom							

Once the filter option is chosen, click on or next to the operation (e.g. Contains).

	sup of this column											
te	Priority	<i>'</i>	Proje									
7	c	7	Cont									
	Normal		Proje									
	Low		Proje									
	Low		Proje									

Once the textbox appears, type in the desired filter to filter the items. Note: The filter is case-sensitive.

ere to group by this column.										
Complete	Priority	Project Na								
ual: 🛛 🏹	C Normal 🛛 🔻	Contains:								
1%	Normal	Project 2								

Hide Columns

To hide columns in the ProperSync grid view, right click on the column header and choose **Hide Column** from the **context menu**.



The column will then be hidden from the view:

y show items :	/ show items selected in Folder View														
	Drag a column here to group by this column.														
Subject	Assigned To	Start Date	Due Date	Status	% Complete	Priority	# of Hours Remaini								
Iontains: 💎	Contains: 💎	Equal: 🍸	Equal: 🍸	Contains: 💎	Equal: 💎	Contains: 💎	Equal:								
Demo Task			11/4/2010	In Progress	13%	Normal									
Demo Task 2				Not Started	0%	Low									
Demo Task 3	demo	3/19/20	3/22/2011	Not Started		Low									

Show Columns

To show columns in the ProperSync grid view, use the grid's **Column Chooser** tool. To access the column chooser, right click on any column header and choose **Column Chooser** from the **context menu**.

nı	n here to grou	p by this colur	nn.		
	% Complete	Priority	# of Hou	irs Remaining	Level of Difficulty
7	Equal: 🖓	Contains: 🝸	Equal:	Sort Asce	ending
	13%	Normal		Sort Des	cending
	0%	Low		Clear Sor	ting
		Low		Conditio	nal Formatting
				Group by	this column
				Column	Thooser
				Hide Col	umn
				Pinned st	ate
				Best Fit	

The column chooser will load on the users screen:



To add a column to the grid, click and drag the item from the column chooser to the desired position.

	- 51M ~	- V	\sim	Tomorro	w 👻 No E	Date	Q	
Column Chooser X	Mor	Mark	Remove	This We	ek 🖤 Cust	om	etailed S	Simple
Project Name		Man	age Task	Fo	ollow Up			
	¢ •	Proper	Sync Grid Vie	w				Se
	0	nly show items	selected in Fol	der View				
		1		1	1	Drag a colum	n here to grou	up by
Drag a column header from the grid here to remove it from	s	Subject	Assigned To	Start Date	Due Date	Status	% CoPripilette	Nam
the current view.	• 7	Contains: 💎	Contains: 🍸	Equal: 🝸	Equal: 🝸	Contains: 🔻	Equal: 💎	Con
		Demo Task			11/4/2010	In Progress	13%	Nor
		Demo Task 2				Not Started	0%	Low
		Demo Task 3	demo	3/19/20	3/22/2011	Not Started		Low

Let go of the mouse button to set the column position

Note: If the column chooser is empty or no fields are shown, then all available fields are already added to the grid.

Re-ordering fields

To re-order the fields within the ProperSync grid view, simply drag and drop the columns within the pane. For example, to move Project Name to the first column, click on Project Name and drag it to the first column position.

		-				Drag a columr	n here to grou	p by this colum	ın.	
	Ł	rojestibject	Assigned To	Start Date	Due Date	Status	% Complete	Priority	Project Name	# of
•	7	Contains: 🔻	Contains: 🍸	Equal: 🍸	Equal: 🍸	Contains: 🍸	Equal: 🛛 🍸	Contains: 🍸	Contains: 🝸	Equa
		Demo Task 3	demo	3/19/20	3/22/2011	Not Started		Low	Project 4	
		Demo Task			11/4/2010	In Progress	13%	Normal	Project 2	
		Demo Task 2				Not Started	0%	Low	Project 2	

Once the column is in the correct spot, let go of the mouse to set the column position

				Dra	ag a columr	here to group	by this colum	ın.	
5	Project Name	Subject	Assigned To	Start Date	Due Date	Status	% Complete	Priority	# of Hou
7	Contains: 🔻	Contains: 🍸	Contains: 🍸	Equal: 🍸	Equal: 🝸	Contains: 🏹	Equal: 🛛 🍸	Contains: 🍸	Equal:
	Project 4	Demo Task 3	demo	3/19/20	3/22/2011	Not Started		Low	
	Project 2	Demo Task			11/4/2010	In Progress	13%	Normal	
	Project 2	Demo Task 2				Not Started	0%	Low	

Creating Custom Views

To create a custom view within the ProperSync grid view:

1) Click on the view dropdown box located in the upper right hand corner of the ProperSync grid view

Sea	Search ProperSync - Example Task List (Ctrl+E)										
		Default View	▼ Refresh								
to group by this co	lumn.	Default View									
mplete Priority	Project Name	By Assignee	I of Difficulty								
I: 💎 Contains:	🍸 Contains: 🍸	Save view as	ains: 💎								
Normal	Project 2	Rename view	ium								
Low	Project 2	Reset view									
Low	Project 4	Delete view									

a.

a.

2) From the dropdown options select Save As

🖳 Save Det	ault View as	×
Enter na Note: Exi	ne to save the view as. ting views will be overwritten.	
Default Vi	w	•
	Save	Cancel

3) Select the text in the box and give the view a new name, then click Save to create a new view



4) The new view will appear in the view dropdown box

		-
	Default View	• Refresh
mn.	Default View	
Project Name	By Project	l of Difficulty
Contains: 🔻	By Assignee	ains: 🔻
Project 2	Save view as	ium
Project 2	Rename view	
Project 4	Reset view	
	Delete view	

- a.
- 5) Select the new view from the dropdown list to see the new view

		By Project	✓ Refr
olum	ın.		
y	Project Name	# of Hours Remaining	Level of Difficulty
7	Contains: 🔻	Equal: 🛛 🏹	Contains: 🛛 🍸
	Project 2	25	Medium
	Project 2	86	Easy
	Project 4	20	Easy

a.

6) Now sort or group the fields by the appropriate columns to apply the settings to the new view

	Onl	(show items s	elected in Folder		By Droject	- Defre						
	ony show temp sector in road view									By Project • Refr		
<i>c</i> .												
Gr	oup	by: Project N	ame 🖂									
	C. Subject Assistant To Charl Data Data Status of Consolution Details.							A				
		S Subject	Assigned To	Start Date	Due Date	Statuc	% Complete	Priority	Project Name	# of Hours Remaining	Level of Difficu	
		S Subject	Assigned To	Start Date	Due Date	Status	% Complete	Priority	Project Name	# of Hours Remaining	Level of Difficu	
		S Subject	Assigned To	Start Date	Due Date Equal: 💎	Status Contains: 🏹	% Complete	Priority Contains: 🟹	Project Name Contains: 🝸	# of Hours Remaining Equal:	Level of Difficu	
	~	S Subject Contains: Project Name	Assigned To	Start Date	Due Date Equal: 🍸	Status Contains: 🏹	% Complete	Priority Contains: 🍸	Project Name Contains: 🍸	# of Hours Remaining Equal: 7	Level of Difficu Contains:	

7) The ProperSync grid view will automatically save the view settings. Switching back to **Default View** will show the list ungrouped

<)	Propers	Sync Grid Viev	N						• •	·
	0	nly show items	selected in Fol	der View						Default View	+ Ref
	Drag a column here to group by this column.								ın.		
	S	Subject	Assigned To	Start Date	Due Date	Status	% Complete	Priority	Project Name	# of Hours Remaining	Level of Difficulty
	V	Contains: 🍸	Contains: 🍸	Equal: 🖓	Equal: 💎	Contains: 🍸	Equal: 💎	Contains: 💎	Contains: 🔻	Equal: 🗸	Contains: 🏾
		Demo Task			11/4/2010	In Progress	13%	Normal	Project 2	25	Medium
		Demo Task 2				Not Started	0%	Low	Project 2	86	Easy
		Demo Task 3	demo	3/19/20	3/22/2011	Not Started		Low	Project 4	20	Easy

8) Switch back to your new view to ensure the settings have been properly saved

Inline Editing

Inline editing in the ProperSync grid view is limited to the following SharePoint fields types

- Single Line of Text
- Multiple Lines of Text (Plain Text)
- Choice (Drop Down)
- Choice (Radio Buttons)
- > Number
- Number (Percentage)
- Currency
- Date/Time (Date Only)

Future upgrades of ProperSync will support inline editing on more field types. The default Outlook fields on the grid are not editable in the current version of ProperSync .

To edit items directly from the grid, double click on the item and column to edit.

us	% Complete	Priority	Project Na	me	# of Hours Remaining
s: 🝸	Equal: 🖓	Contains: 💎	Contains:	7	Equal: 🛛
ress	13%	Normal	Project 2	•	25
rted	0%	Low	Project 1		86
			Project 2		
			Project 3		
			Project 4		

Once the item has been changed, select a different row or the filter row above to save the update to SharePoint.

Opening an Item from Grid View

To open a single item, from within the ProperSync grid view, double click on the first column in the grid

with the symbol:

	s	Subj
	7	Contain
+		Demo 1
		Demo 1
		Demo 1

The Outlook item form will open for the item selected:

🕄 🖬 🤊 (° 🍝	♥	
File Task	Insert Format Text Review	♥ 🕜
Assigned To		😸 ProperSync Fields 🛛 »
Subject:	Demo Task 2	Project Name:
Start date:	None	Project 2 🗸
Due date:	None v Priority: Normal v % Complete: 0%	# of Hours Remaining:
		86
Reminder:	None v None v 🕼	Level of Difficulty:
	Ca)	Easy 👻
		1
		3
	v	
In Shared Folder:	ProperSync - Example Task List Last modified by demo at 10:38 AM	

Refresh Grid View

To refresh the ProperSync grid view, simply press the refresh button in the upper right hand corner of the grid.

