

ProperSync

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

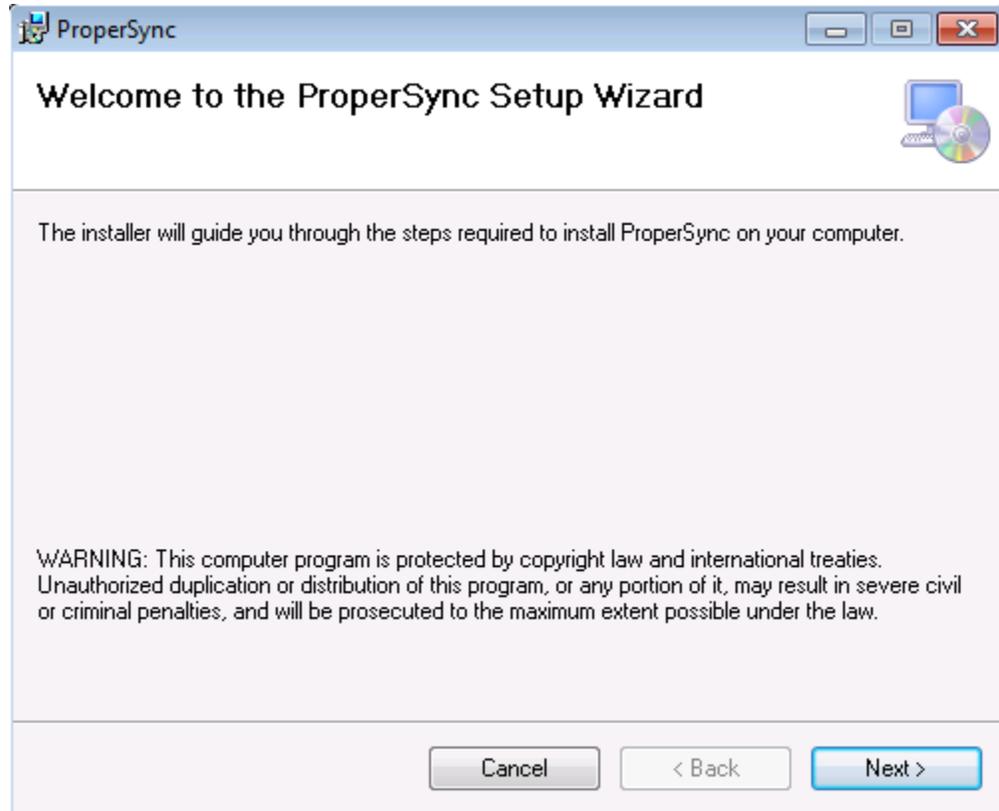
- ProperSync Grid View
- Custom “[propersync]” views on SharePoint lists
- Performance Enhancements
- SharePoint Contact Item Support

Getting Started

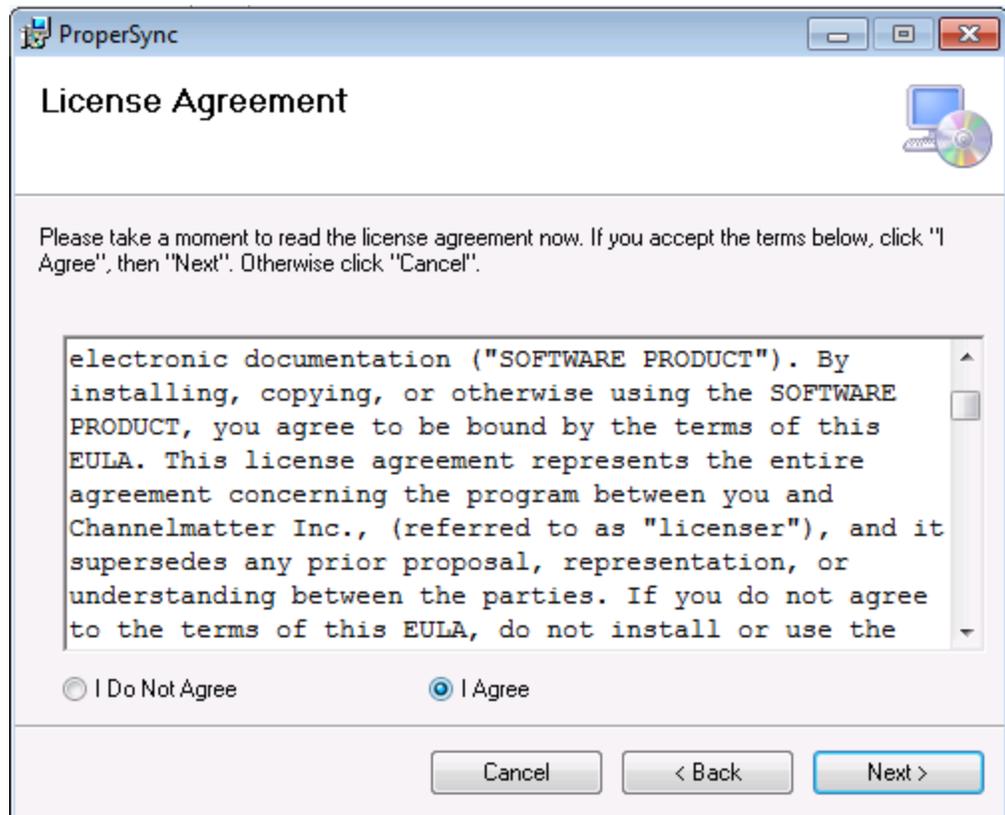
Installing ProperSync

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

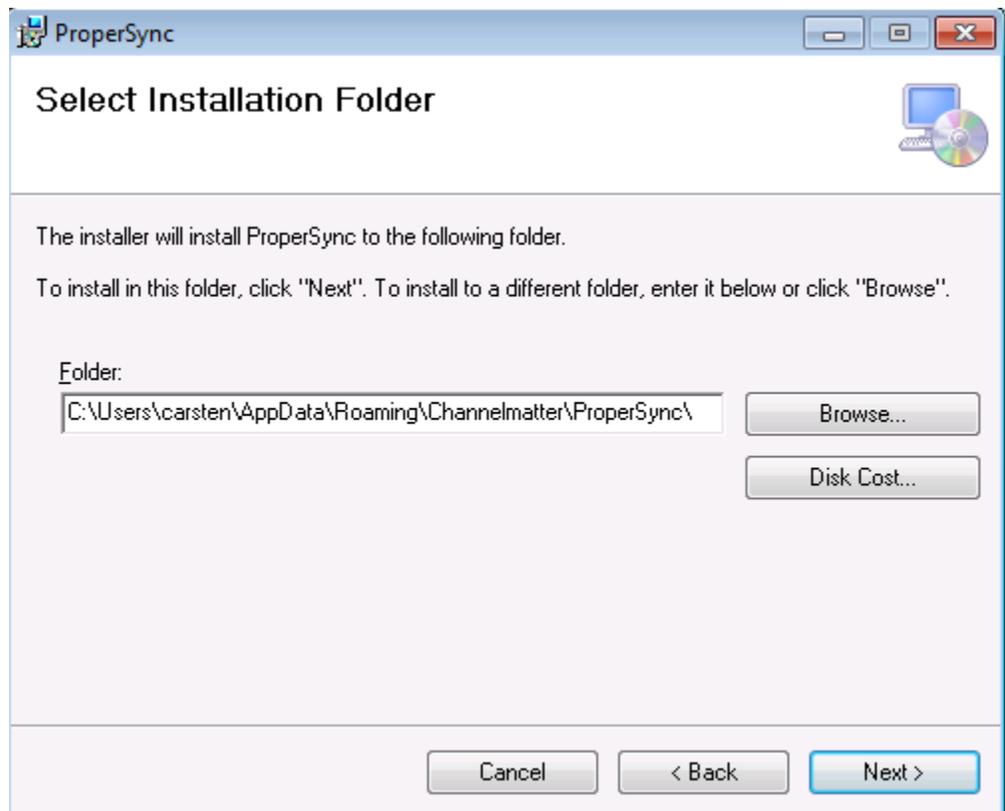
- 1) Close Microsoft Outlook
- 2) Open the ProperSync zip file downloaded from <http://www.propersync.com/downloads.aspx>
- 3) Run the setup.exe file
- 4) Click **Next** from the main screen



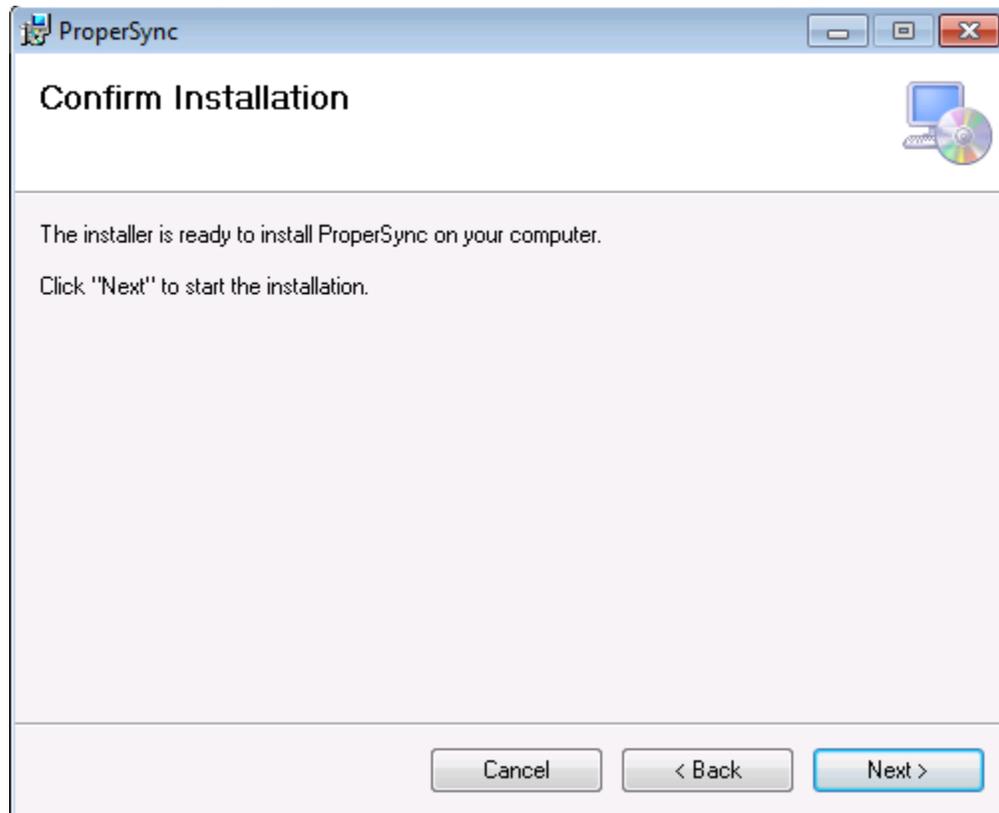
- 5) Read the **License Agreement**, if you agree with the terms, click on the **I Agree** radio button, then click **Next**



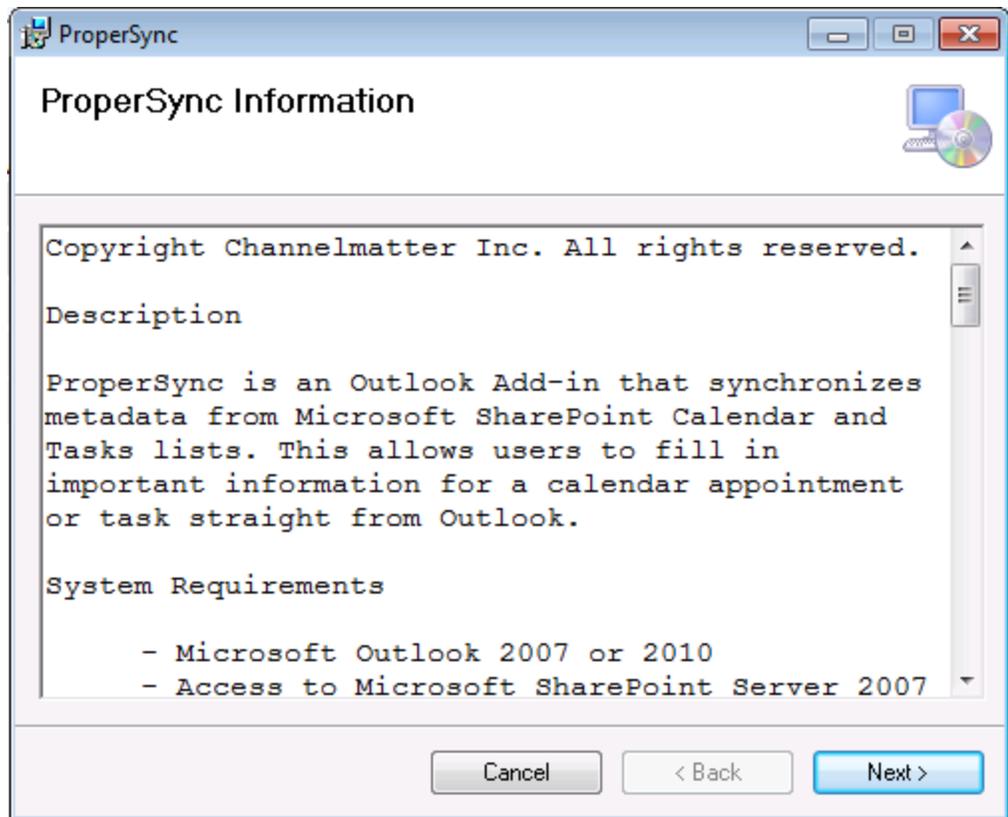
- 6) Verify the **Install Folder** is correct, use the **Browse** button if you wish to correct it, then click **Next**



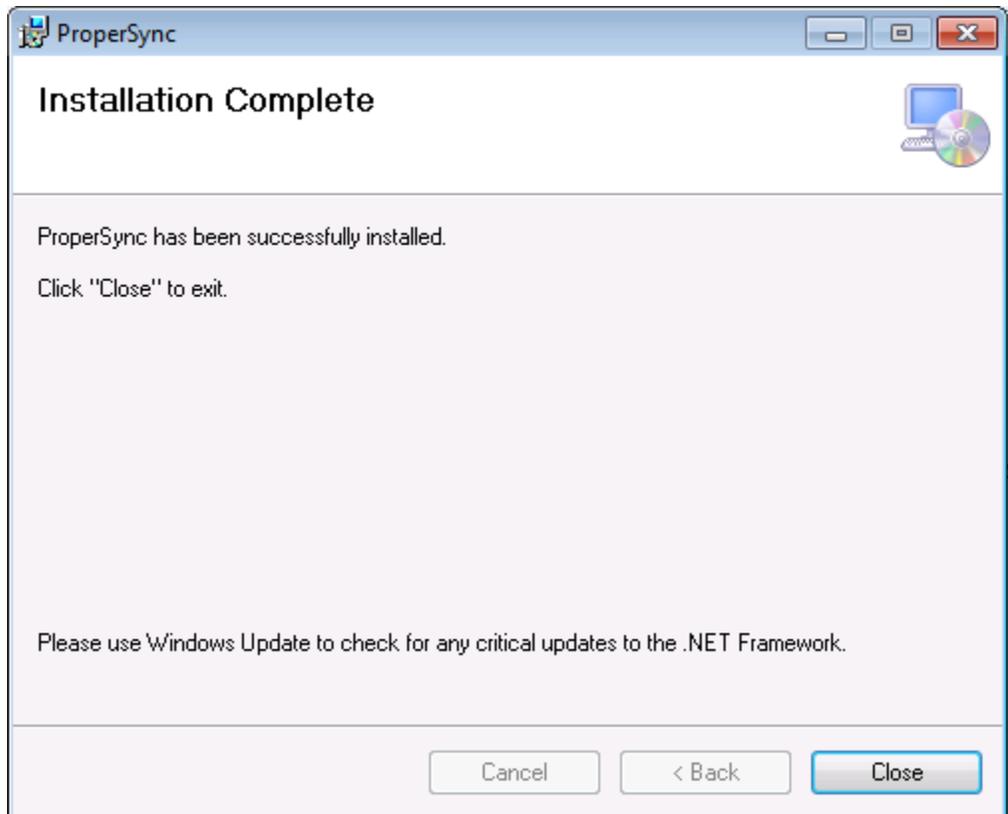
- 7) When ready to **Install** ProperSync, click **Next** on the **Confirm Installation** page



- 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



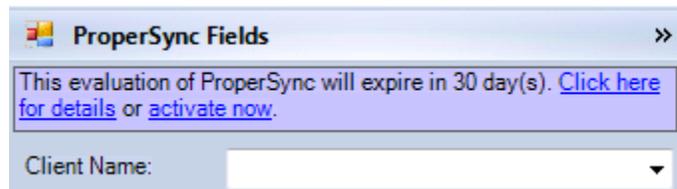
10) The installation is now complete. Press **Close** to close the installer

Activating ProperSync

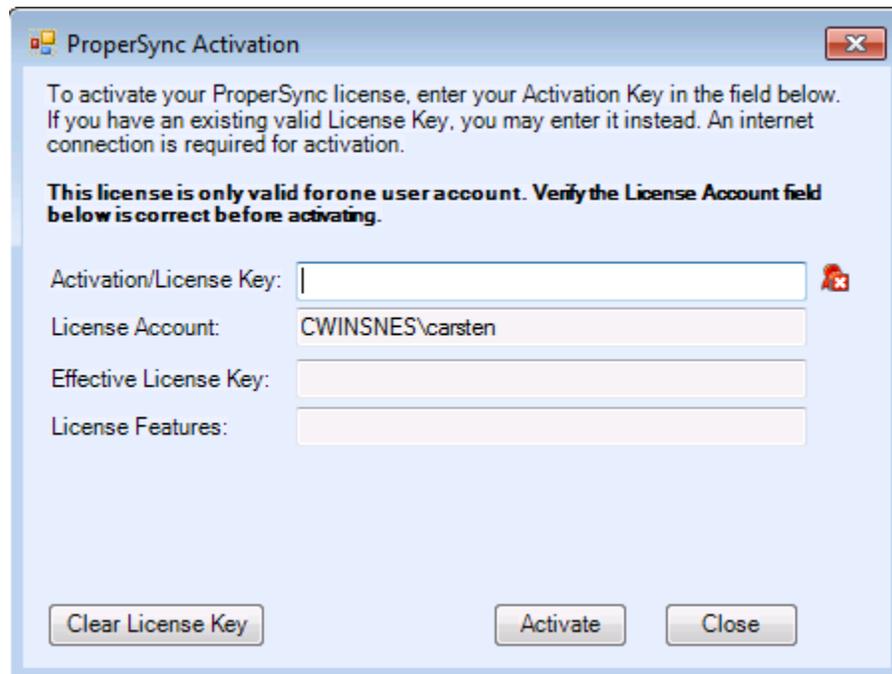
ProperSync can be activated directly within an Outlook appointment item or task. It can also be activated within the ProperSync settings area.

To activate ProperSync within an Outlook appointment or task item

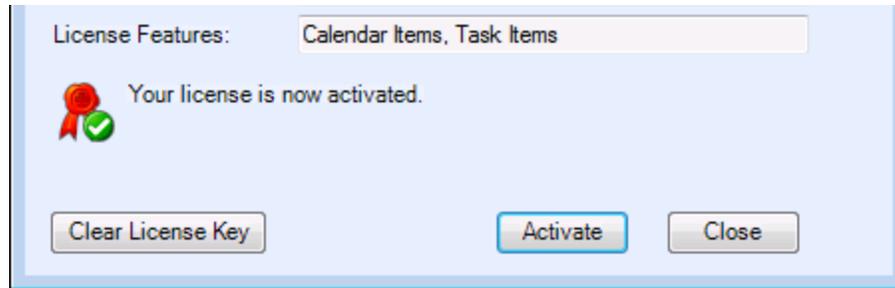
- 1) Open Microsoft Outlook
- 2) Browse to a SharePoint calendar or task list within Outlook
- 3) **Open an item** from the list or select **New Item** from the Outlook menu
- 4) On top of the **ProperSync Pane**, click the **Activate Now** link on the top of the ProperSync Fields pane (if this link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



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



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

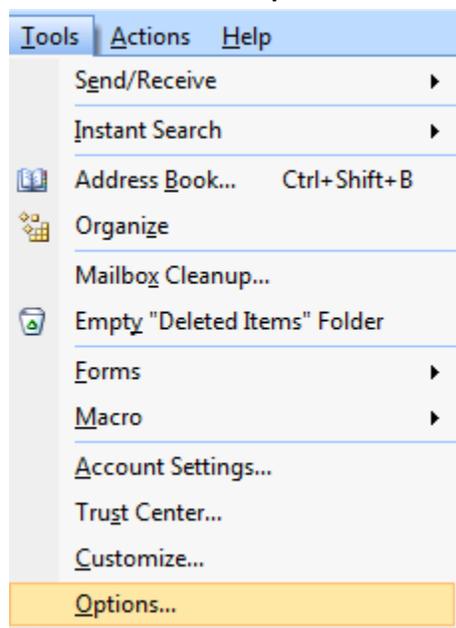


- 7) Click **Close** to close the **ProperSync Activation** dialog box

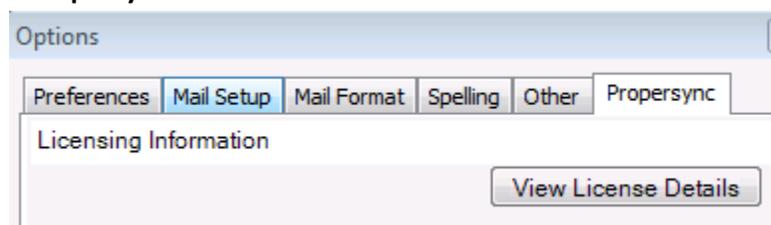
To Activate ProperSync from Add-in Options

Outlook 2007

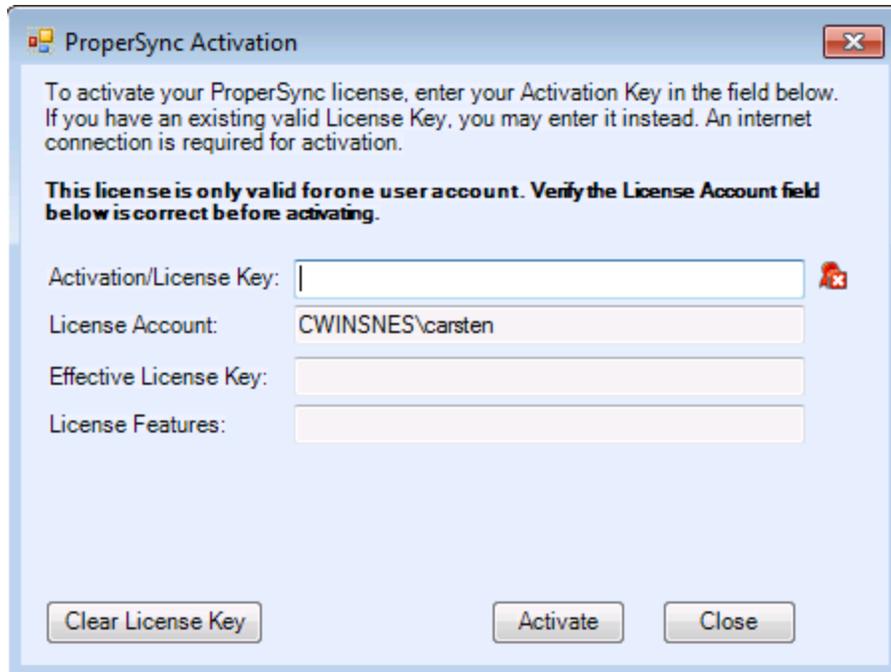
- 1) Open Microsoft Outlook 2007
- 2) From the **Tools** menu select **Options**



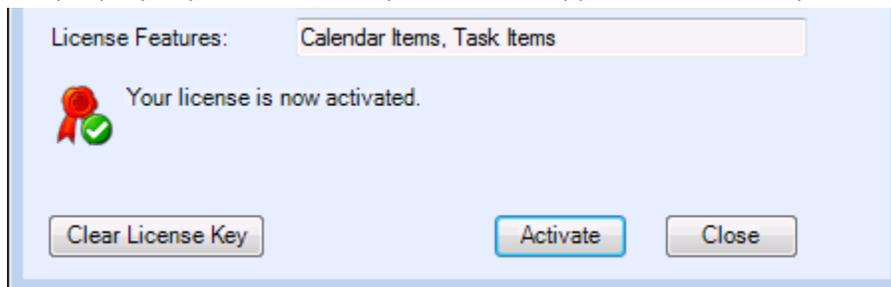
- 3) From the **Options** dialog box select the **ProperSync** tab
- 4) From the **ProperSync** tab select **View License Details**



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



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



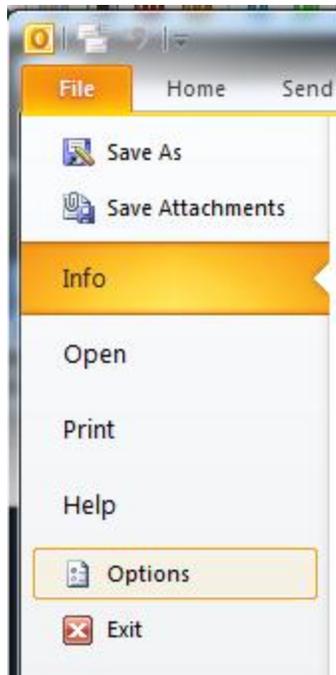
- 7) Click **Close** to close the **ProperSync Activation** dialog box

Outlook 2010

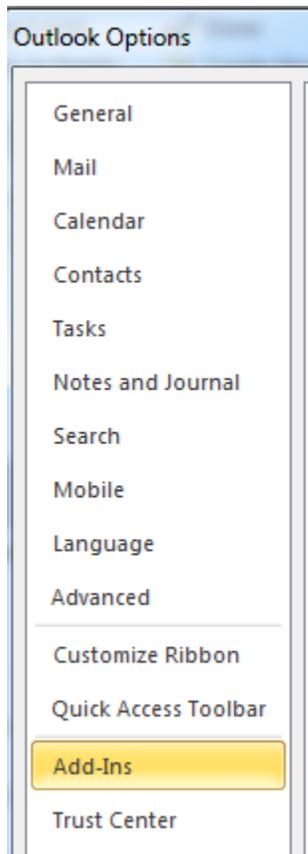
- 1) Open Microsoft Outlook 2010
- 2) **Click** on the **File** button



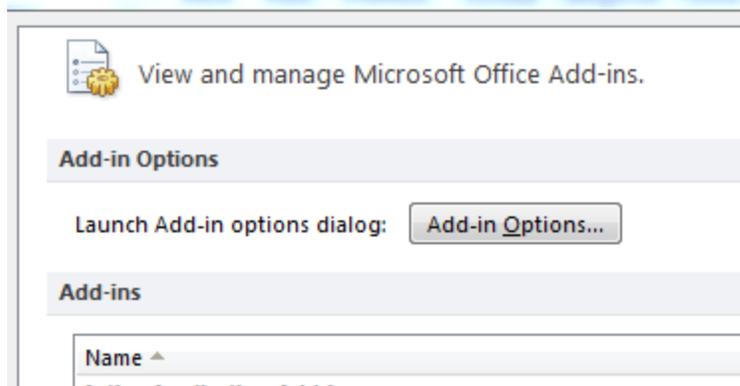
- 3) From the **File** menu select **Options**



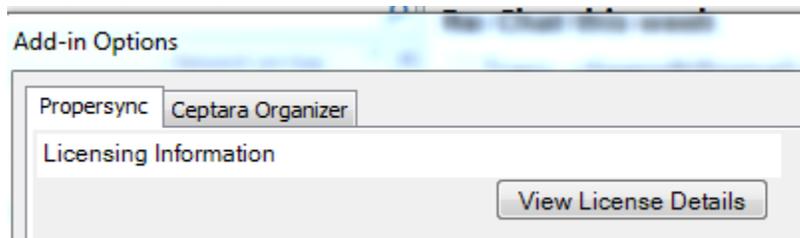
4) From the **Options** dialog box select **Add-ins**



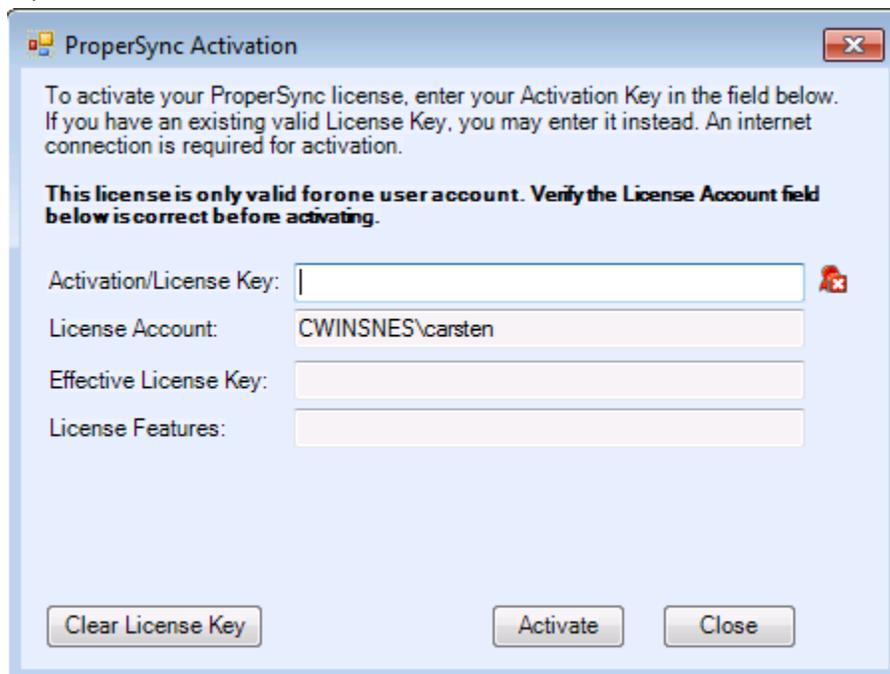
5) From the Add-ins sections select **Add-in Options...**



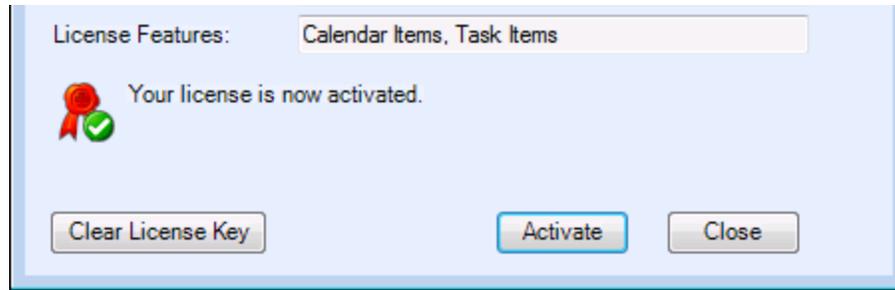
- 6) From the **Add-ins Options** dialog box select the **ProperSync** tab
- 7) From the ProperSync tab press the **View License Details** button



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



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



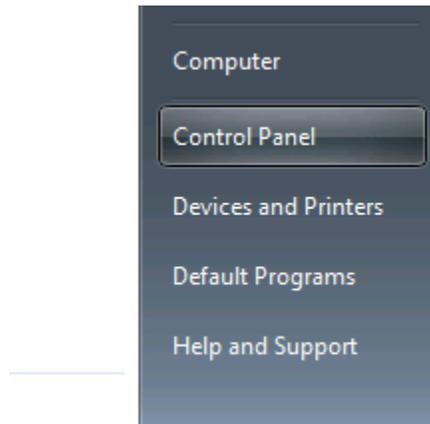
10) Click **Close** to close the **ProperSync Activation** dialog box

Uninstalling ProperSync

To uninstall ProperSync, use the default Windows uninstall process

Windows 7 & Vista Users

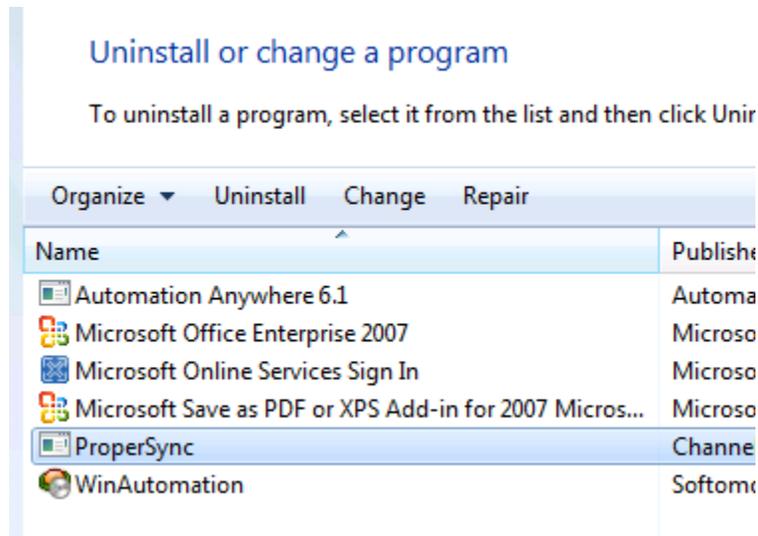
- 1) Close Microsoft Outlook
- 2) Click the **Start Menu** and select **Control Panel**



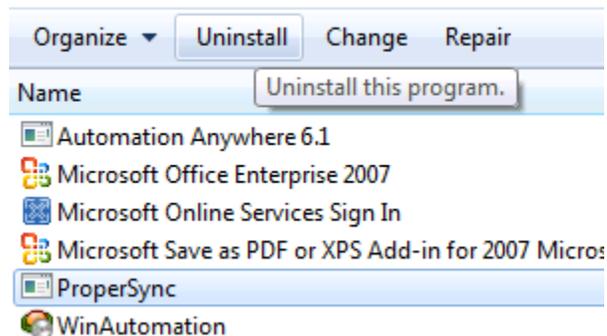
- 3) From the **Control Panel** select **Uninstall a Program**



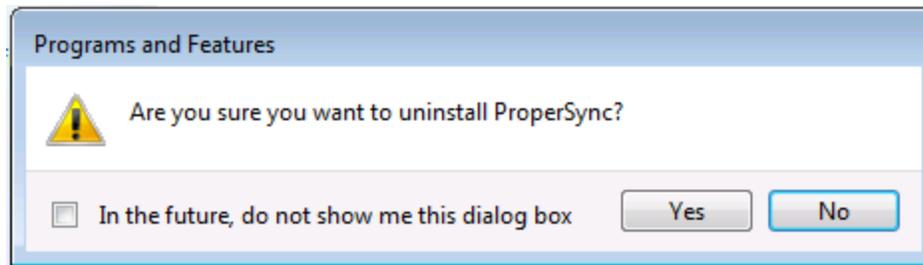
4) From the list of installed programs select **ProperSync**



5) From the menu select **Uninstall**



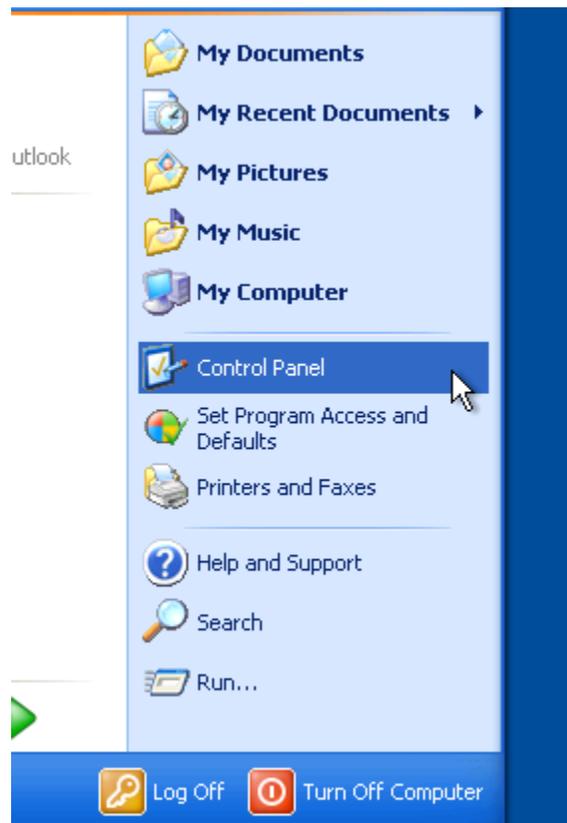
6) From the dialog box press **Yes**



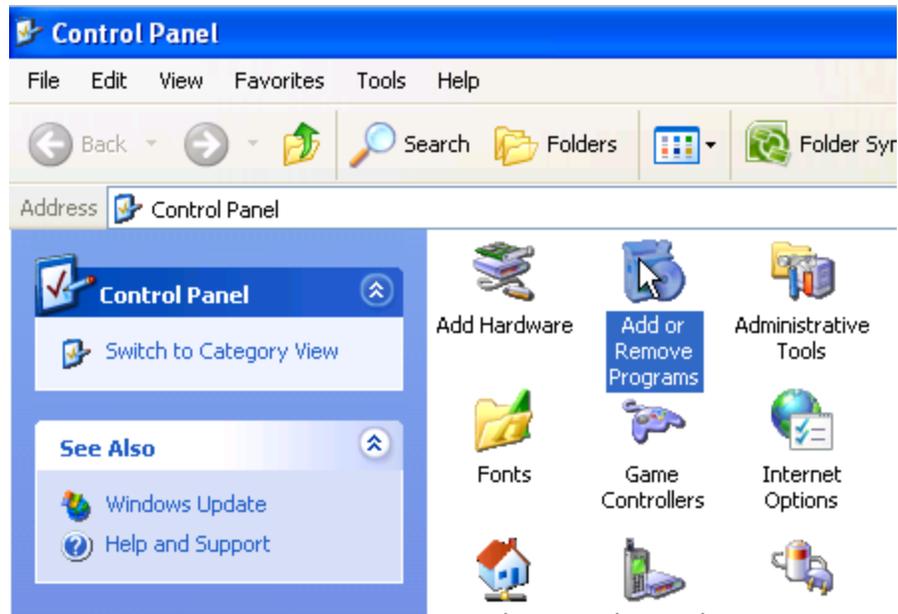
7) ProperSync will be uninstalled from the system

Windows XP Users

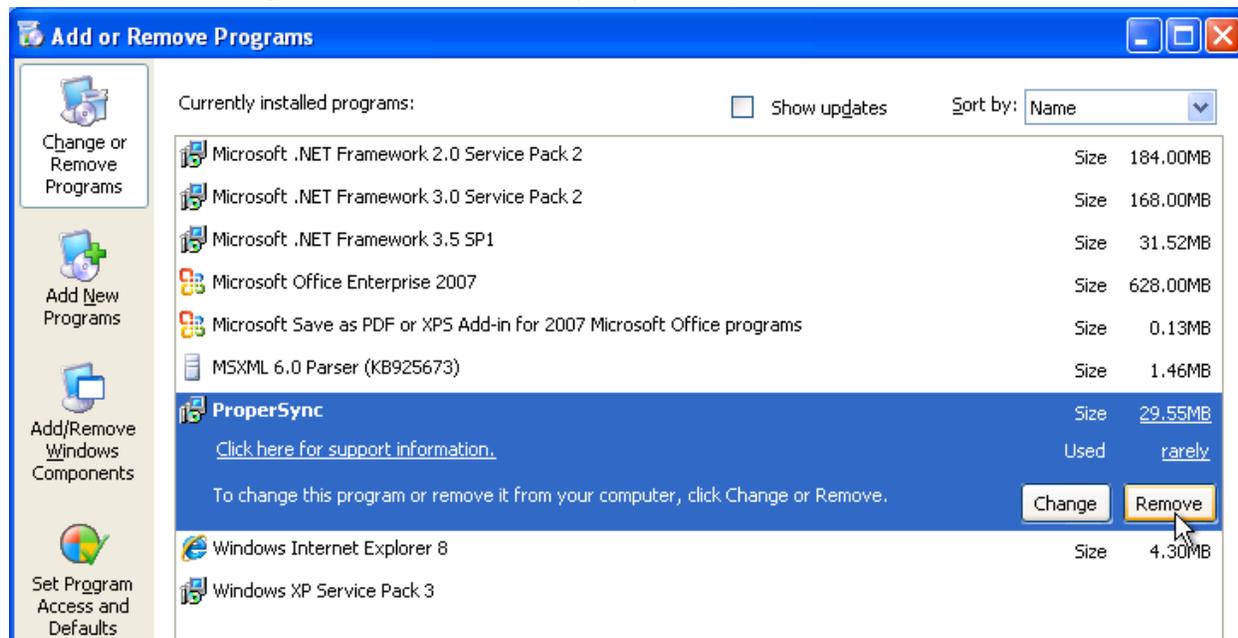
- 1) Close Microsoft Outlook
- 2) From the **Start Menu** select **Control Panel**



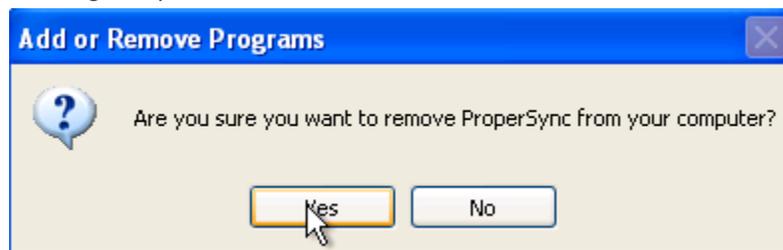
3) From the **Control Panel** select **Add or Remove Programs**



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



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.

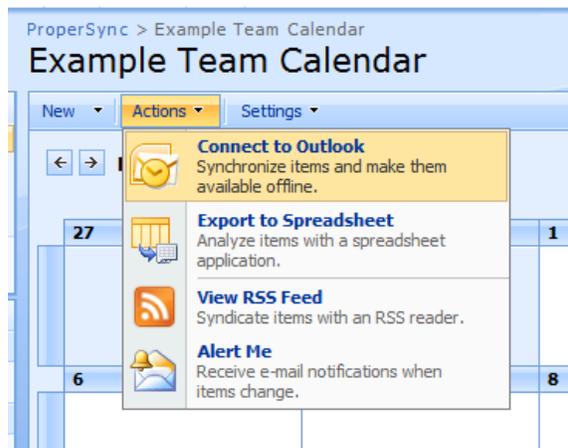
Why connect SharePoint calendars and tasks to your Outlook client?

- 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
- Copy items to your personal calendar

Connect a SharePoint 2007 List to Microsoft Outlook

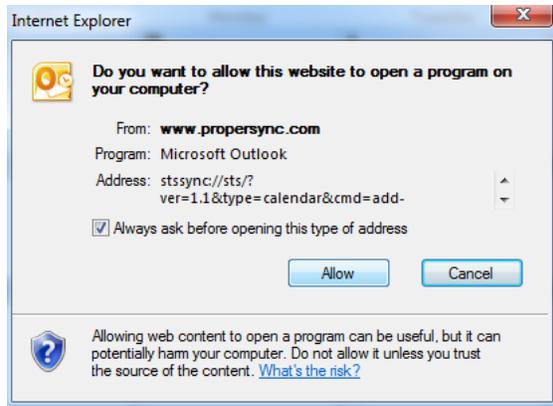
To connect a SharePoint calendar or task list to Microsoft Outlook

- 1) Open a web browser and browse to your SharePoint List
- 2) From the **Actions** menu select **Connect to Outlook** (or Connect to Client)

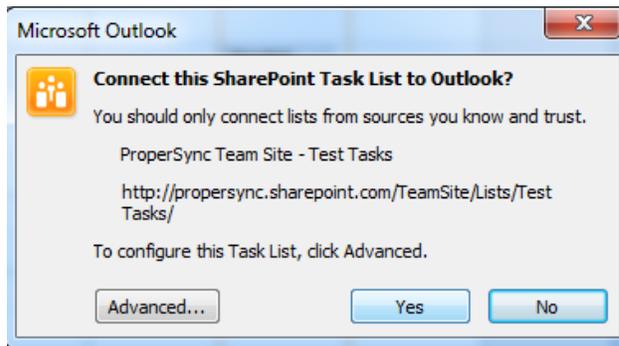


a.

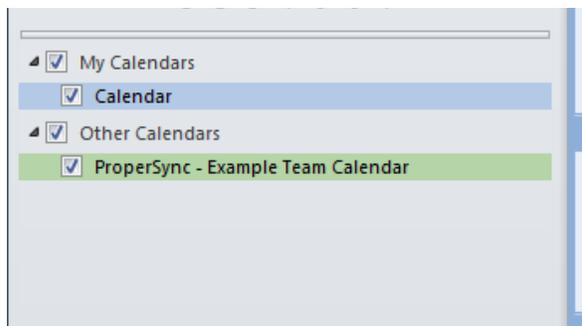
- 3) When prompted by Internet Explorer press **OK** to connect the list



4) When prompted by Outlook click **Yes**



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

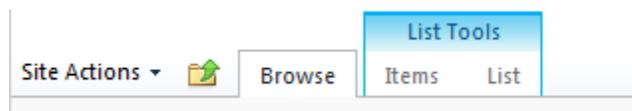


a.

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

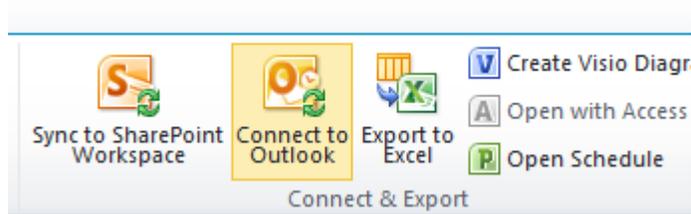
Connect a SharePoint 2010 List to Microsoft Outlook

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

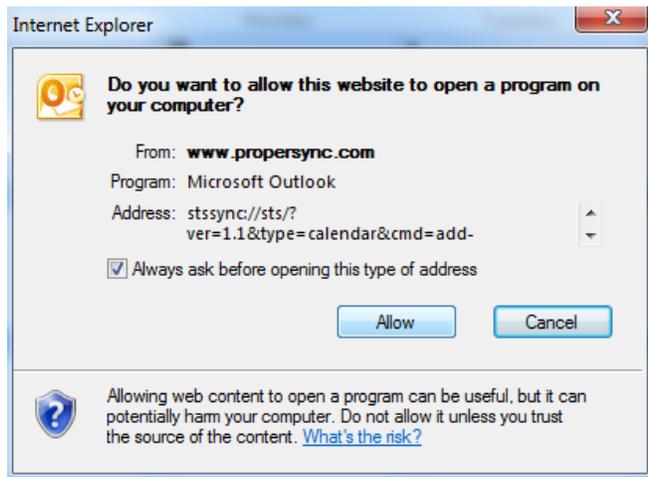




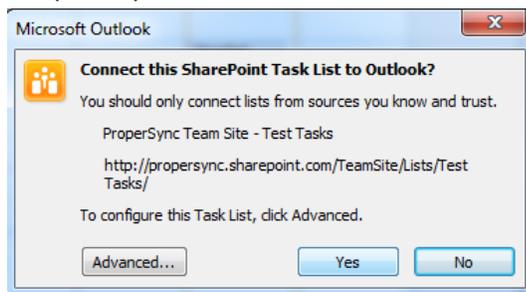
3) In the **Connect & Export** section of the List (or Calendar) tab, press **Connect to Outlook**



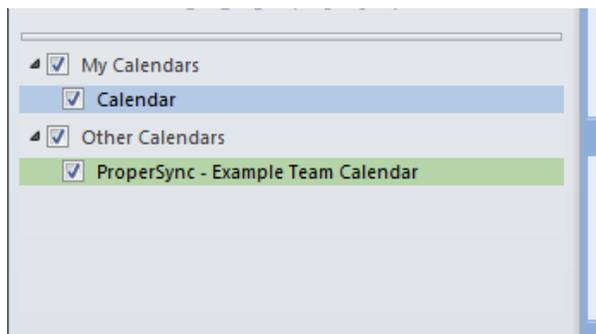
4) When prompted by Internet Explorer press **OK** to connect the list



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:

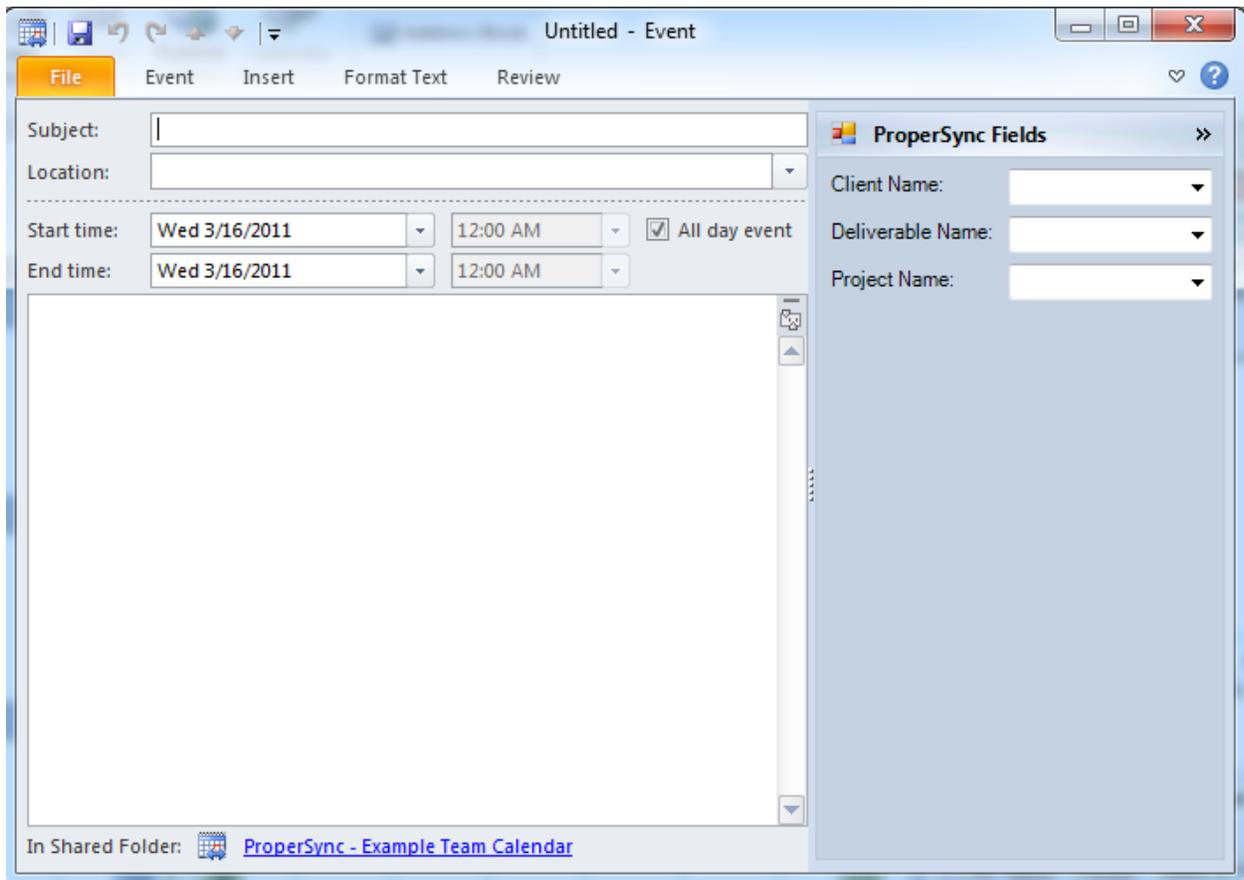
<http://office.microsoft.com/en-us/outlook-help/view-and-create-tasks-on-a-sharepoint-site-by-using-outlook-HA010082030.aspx>

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

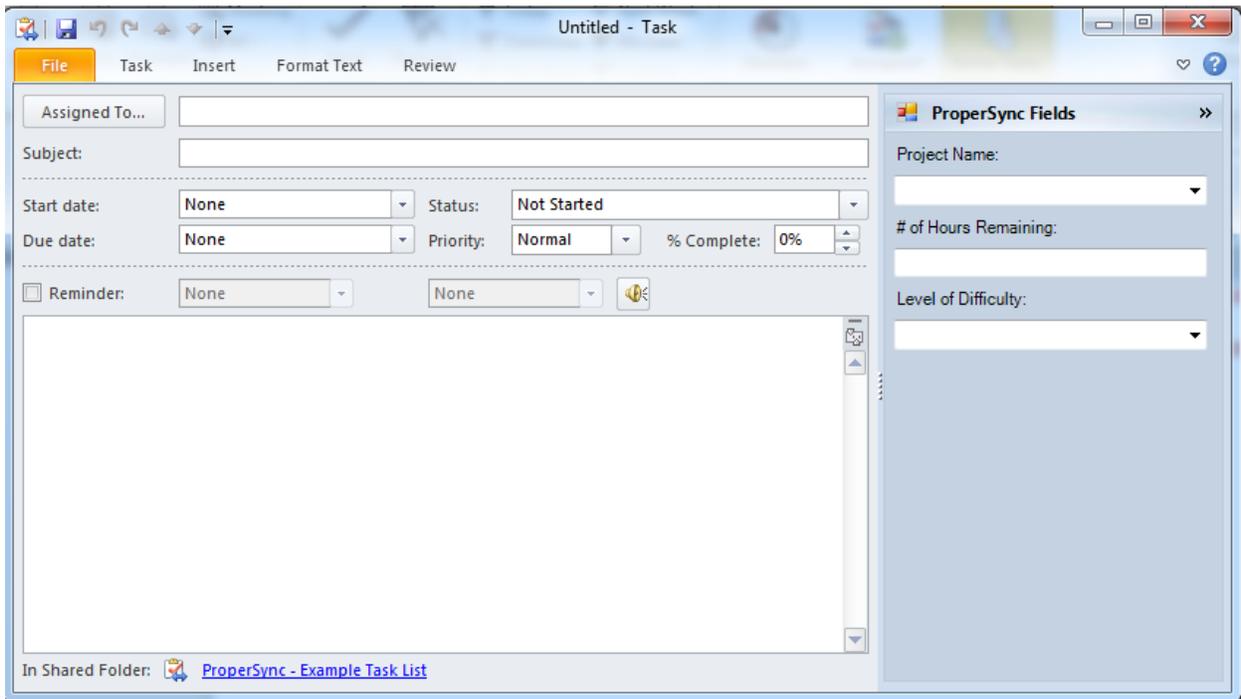
Viewing ProperSync Fields in Outlook

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:



ProperSync pane in a task item:



Tasks can also be seen in the ProperSync grid view:

The screenshot shows the "ProperSync Grid View" window. It has a checkbox "Only show items selected in FolderView" and a "Default View" dropdown with a "Refresh" button. Below is a table with columns: S, Subject, Assigned To, Start Date, Due Date, Status, % Complete, Priority, Project Name, # of Hours R. The table contains three rows of task data.

S	Subject	Assigned To	Start Date	Due Date	Status	% Complete	Priority	Project Name	# of Hours R
→	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 [Using the ProperSync Grid View](#), later in this documentation.

Supported ProperSync Field Types

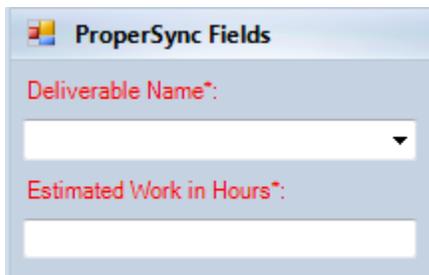
The ProperSync 1.2 supports the following field types:

- 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

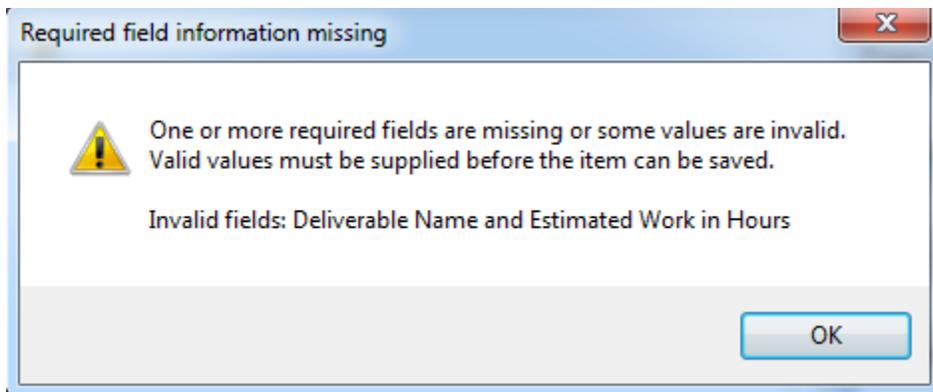
ProperSync will enforce required fields within the Outlook item. Required fields are indicated with a red text. If a user tries to save the item without filling out the required information ProperSync will alert the user of the required fields.

Required fields in the ProperSync Pane:



The screenshot shows a window titled "ProperSync Fields". It contains two fields, both with red text labels indicating they are required. The first field is labeled "Deliverable Name*" and is a dropdown menu. The second field is labeled "Estimated Work in Hours*" and is a text input field.

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 [Controlling Fields in Outlook](#), 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.

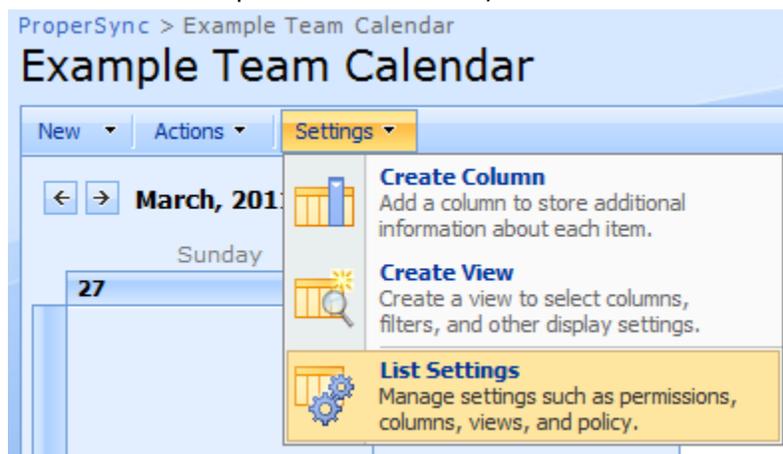
Notes:

- 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)



- 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 (click to edit)	Default View
All Events	✓
Calendar	

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

Columns

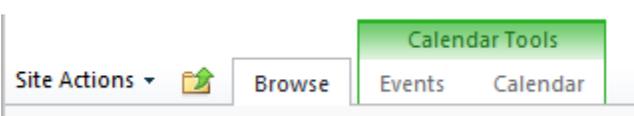
Select or clear the check box next to each column you want to show or hide in this view. To specify the order of the columns, select a number in the **Position from left** box.

Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	Recurrence	1
<input checked="" type="checkbox"/>	Attachments	2
<input checked="" type="checkbox"/>	Workspace	3
<input checked="" type="checkbox"/>	Title (linked to item with edit menu)	4
<input checked="" type="checkbox"/>	Location	5
<input checked="" type="checkbox"/>	Start Time	6
<input checked="" type="checkbox"/>	End Time	7
<input checked="" type="checkbox"/>	All Day Event	8
<input checked="" type="checkbox"/>	Modified	9
<input checked="" type="checkbox"/>	Modified By	10
<input checked="" type="checkbox"/>	Client Name	11
<input type="checkbox"/>	Content Type	12
<input type="checkbox"/>	Created	13
<input type="checkbox"/>	Created By	14
<input type="checkbox"/>	Deliverable Name	15
<input type="checkbox"/>	Description	16
<input type="checkbox"/>	Edit (link to edit item)	17
<input type="checkbox"/>	ID	18
<input type="checkbox"/>	Project Name	19

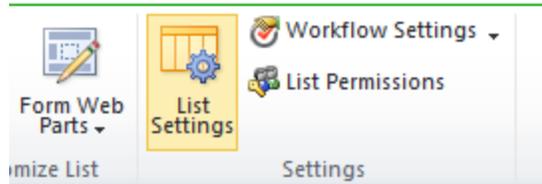
- 5) The columns that are checked are the columns in the view. Any custom columns selected will appear in the ProperSync pane, in the order specified.
- 6) Update and press **OK** to save the view.

SharePoint 2010

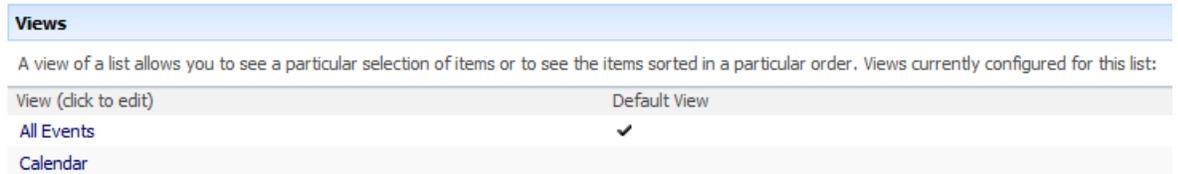
- 1) Open a web browser and browse to the SharePoint list
- 2) Select **List (or Calendar)** tab from the SharePoint ribbon



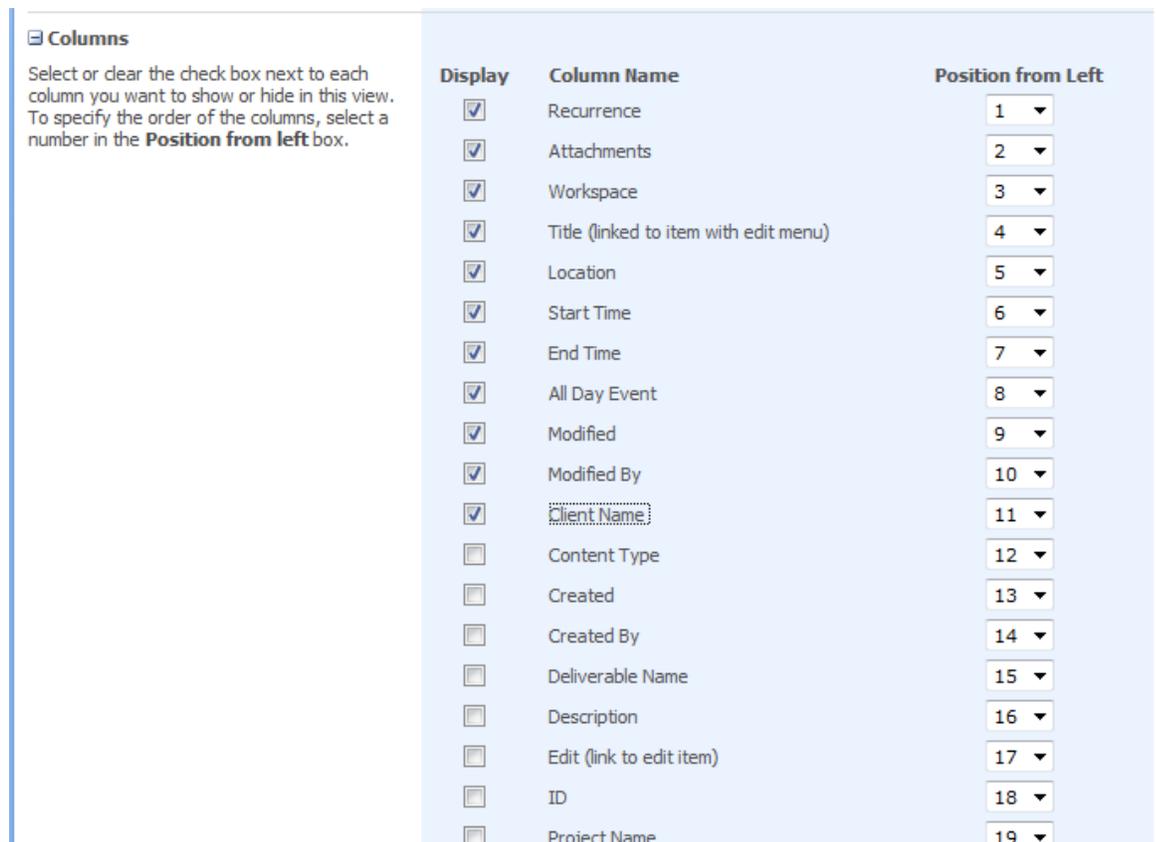
3) In the **Settings** section, click on **List Settings**



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



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

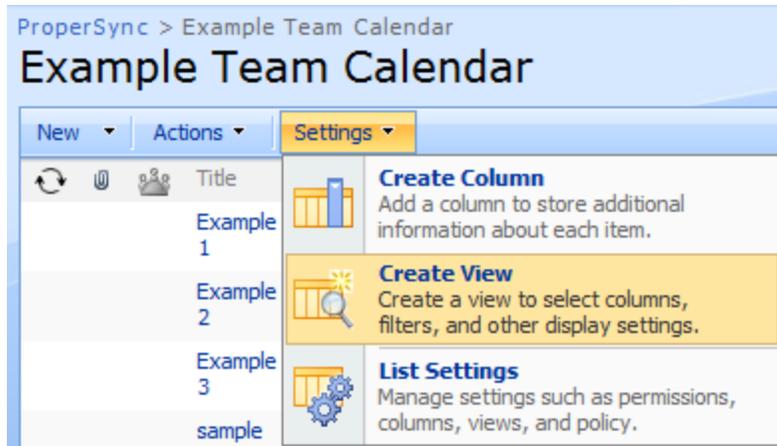


- 6) The columns that are checked are the columns in the view. Any custom columns selected will appear in the ProperSync pane, in the order specified.
- 7) Update and press **OK** to save the view.

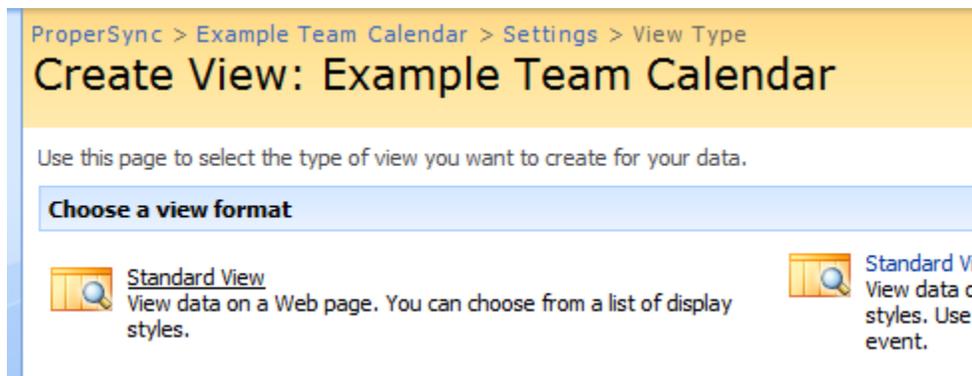
Creating a [propersync] View

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)



- 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)



- 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 want to show or hide in this view. To specify the order of the columns, select a number in the **Position from left** box.

Display	Column Name	Position from Left
<input type="checkbox"/>	Recurrence	1
<input type="checkbox"/>	Attachments	2
<input type="checkbox"/>	Workspace	3
<input type="checkbox"/>	Title (linked to item with edit menu)	4
<input type="checkbox"/>	Location	5
<input type="checkbox"/>	Start Time	6
<input type="checkbox"/>	End Time	7
<input type="checkbox"/>	All Day Event	8
<input checked="" type="checkbox"/>	Client Name	9
<input type="checkbox"/>	Content Type	10
<input type="checkbox"/>	Created	11
<input type="checkbox"/>	Created By	12
<input checked="" type="checkbox"/>	Deliverable Name	13
<input type="checkbox"/>	Description	14
<input type="checkbox"/>	Edit (link to edit item)	15
<input type="checkbox"/>	ID	16
<input type="checkbox"/>	Modified	17
<input type="checkbox"/>	Modified By	18
<input checked="" type="checkbox"/>	Project Name	19

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

Columns

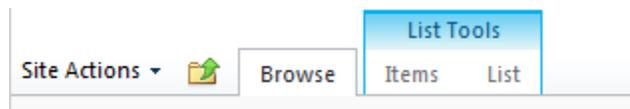
Select or clear the check box next to each column you want to show or hide in this view. To specify the order of the columns, select a number in the **Position from left** box.

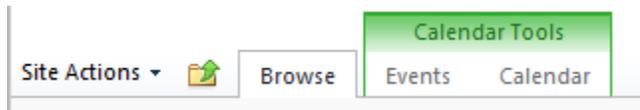
Display	Column Name	Position from Left
<input type="checkbox"/>	Recurrence	4
<input type="checkbox"/>	Attachments	5
<input type="checkbox"/>	Workspace	6
<input type="checkbox"/>	Title (linked to item with edit menu)	7
<input type="checkbox"/>	Location	8
<input type="checkbox"/>	Start Time	9
<input type="checkbox"/>	End Time	10
<input type="checkbox"/>	All Day Event	11
<input checked="" type="checkbox"/>	Client Name	1
<input type="checkbox"/>	Content Type	2
<input type="checkbox"/>	Created	3
<input type="checkbox"/>	Created By	4
<input checked="" type="checkbox"/>	Deliverable Name	5

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

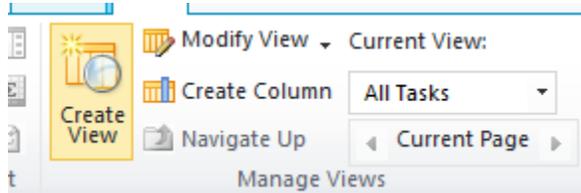
SharePoint 2010

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

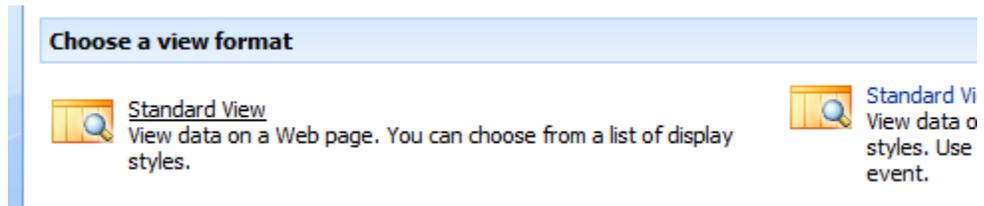




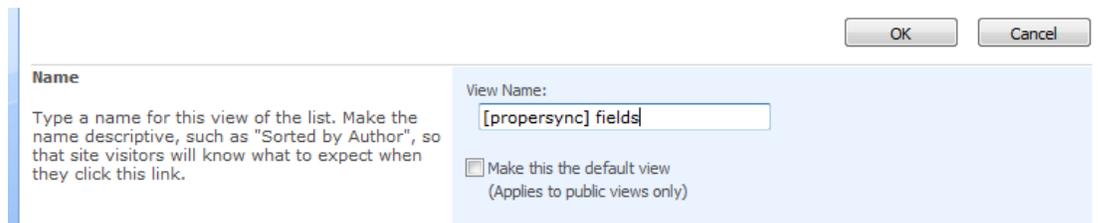
3) In the **Manage Views** section, click on **Create View**



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)



- 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 want to show or hide in this view. To specify the order of the columns, select a number in the **Position from left** box.

Display	Column Name	Position from Left
<input type="checkbox"/>	Recurrence	1
<input type="checkbox"/>	Attachments	2
<input type="checkbox"/>	Workspace	3
<input type="checkbox"/>	Title (linked to item with edit menu)	4
<input type="checkbox"/>	Location	5
<input type="checkbox"/>	Start Time	6
<input type="checkbox"/>	End Time	7
<input type="checkbox"/>	All Day Event	8
<input checked="" type="checkbox"/>	Client Name	9
<input type="checkbox"/>	Content Type	10
<input type="checkbox"/>	Created	11
<input type="checkbox"/>	Created By	12
<input checked="" type="checkbox"/>	Deliverable Name	13
<input type="checkbox"/>	Description	14
<input type="checkbox"/>	Edit (link to edit item)	15
<input type="checkbox"/>	ID	16
<input type="checkbox"/>	Modified	17
<input type="checkbox"/>	Modified By	18
<input checked="" type="checkbox"/>	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 want to show or hide in this view. To specify the order of the columns, select a number in the **Position from left** box.

Display	Column Name	Position from Left
<input type="checkbox"/>	Recurrence	4
<input type="checkbox"/>	Attachments	5
<input type="checkbox"/>	Workspace	6
<input type="checkbox"/>	Title (linked to item with edit menu)	7
<input type="checkbox"/>	Location	8
<input type="checkbox"/>	Start Time	9
<input type="checkbox"/>	End Time	10
<input type="checkbox"/>	All Day Event	11
<input checked="" type="checkbox"/>	Client Name	1
<input type="checkbox"/>	Content Type	2
<input type="checkbox"/>	Created	3
<input type="checkbox"/>	Created By	4
<input checked="" type="checkbox"/>	Deliverable Name	7

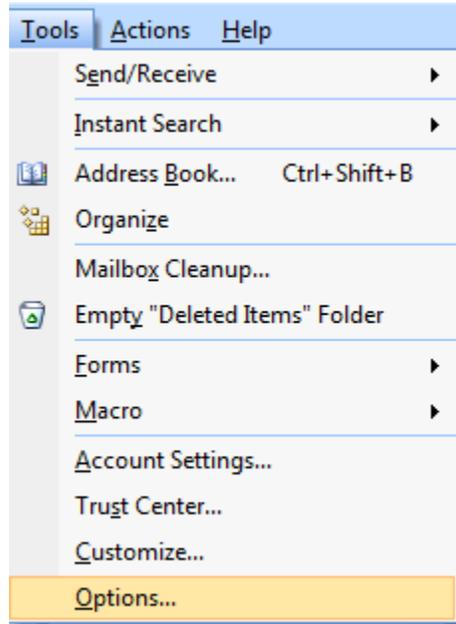
- 8) Press **OK** to save the list view

ProperSync Options

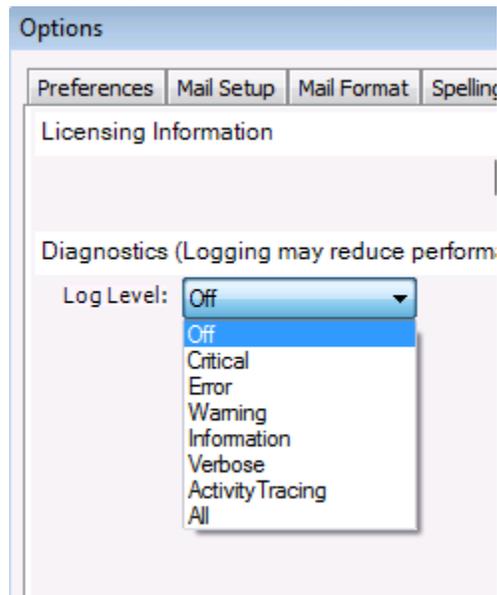
Enabling Logging

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.



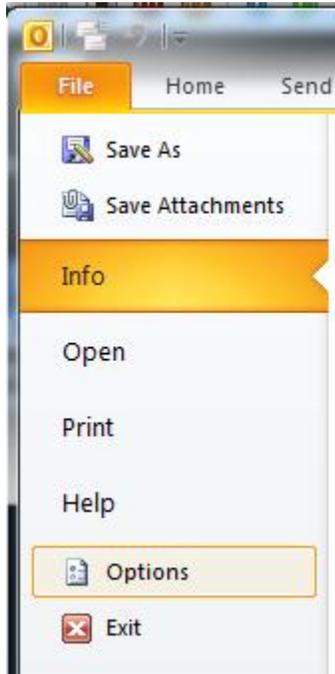
- a.
 - 5) Once the logging level has been set, press OK to apply the settings

Outlook 2010

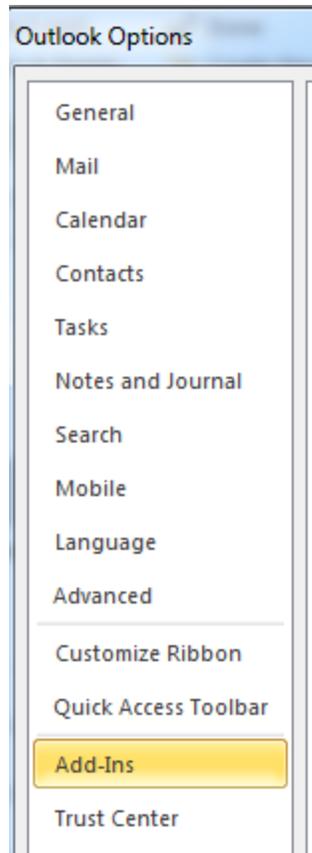
- 1) Open Microsoft Outlook 2010
- 2) **Click** on the **File** button



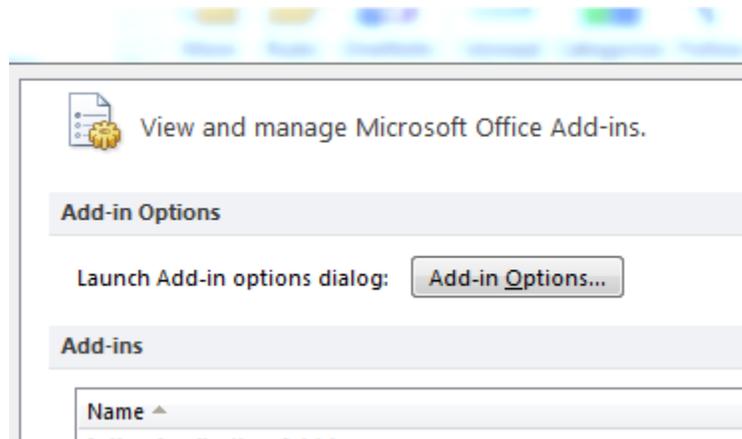
- 3) From the **File** menu select **Options**



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

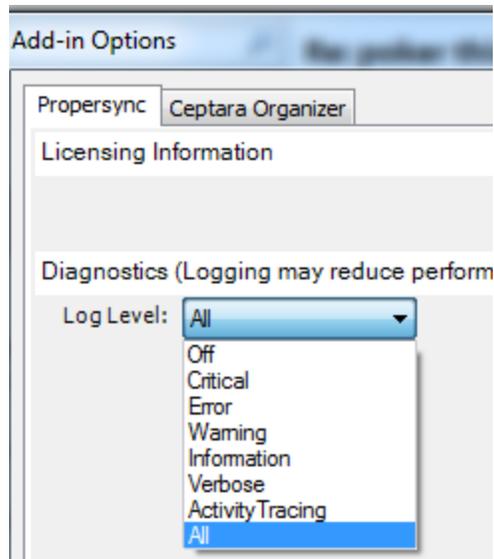


5) From the Add-ins sections select **Add-in Options...**



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.



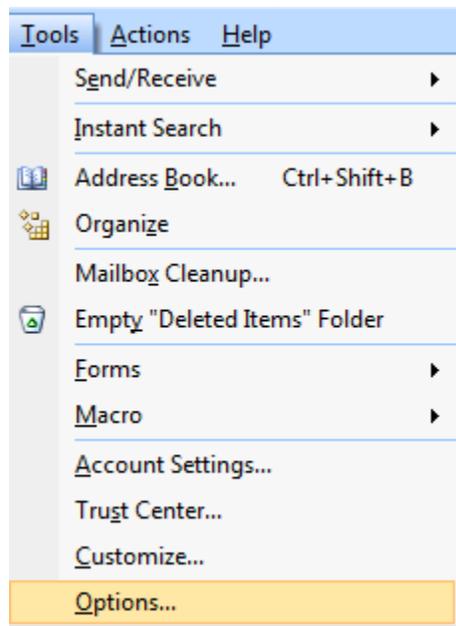
a.

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

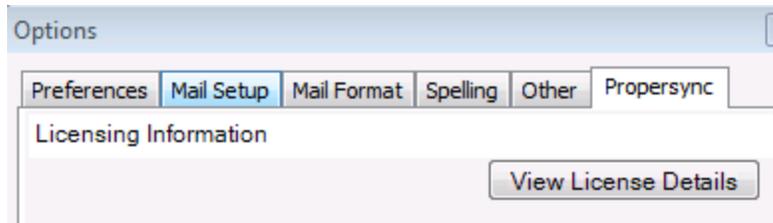
Updating/Changing Activation Key

Outlook 2007

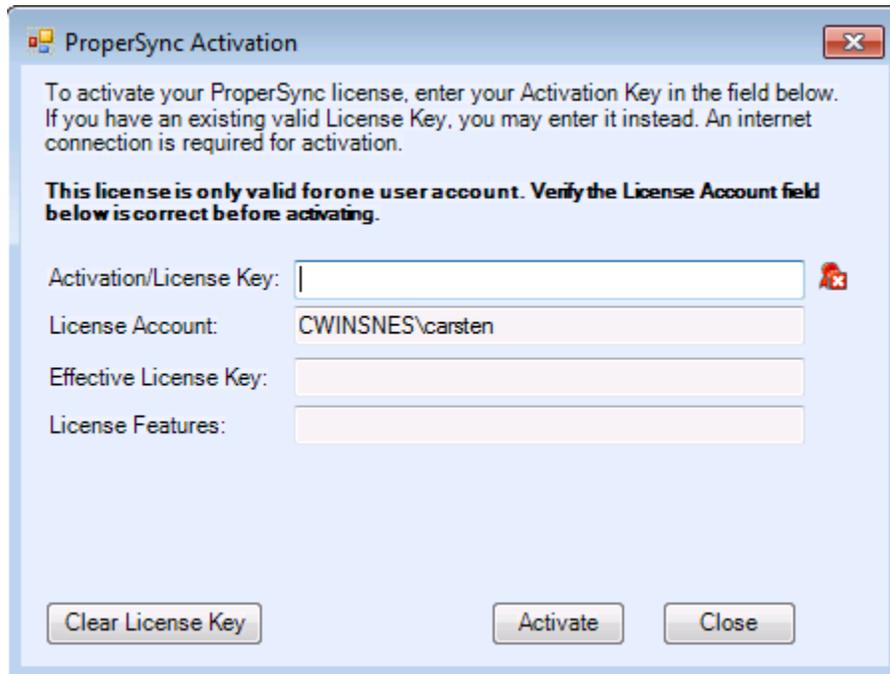
- 8) Open Microsoft Outlook 2007
- 9) From the **Tools** menu select **Options**



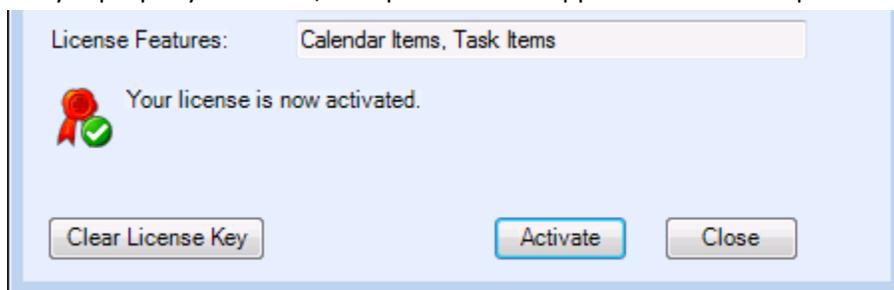
- 10) From the **Options** dialog box select the **ProperSync** tab
- 11) From the **ProperSync** tab select **View License Details**



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



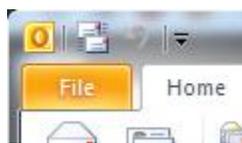
- 13) Once the key is properly activated, a response will be appear in the blank space



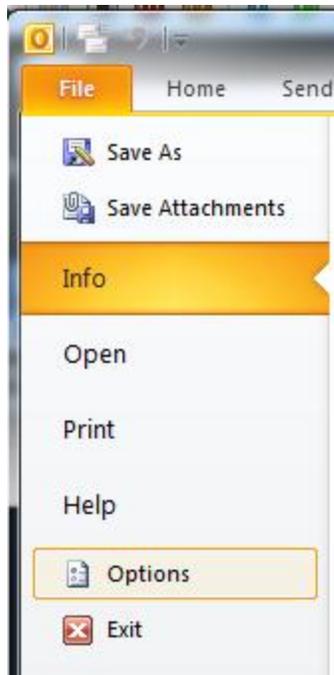
- 14) Click **Close** to close the **ProperSync Activation** dialog box

Outlook 2010

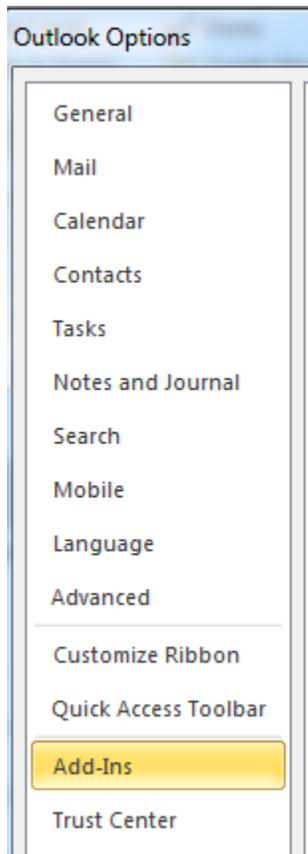
- 11) Open Microsoft Outlook 2010
- 12) Click on the **File** button



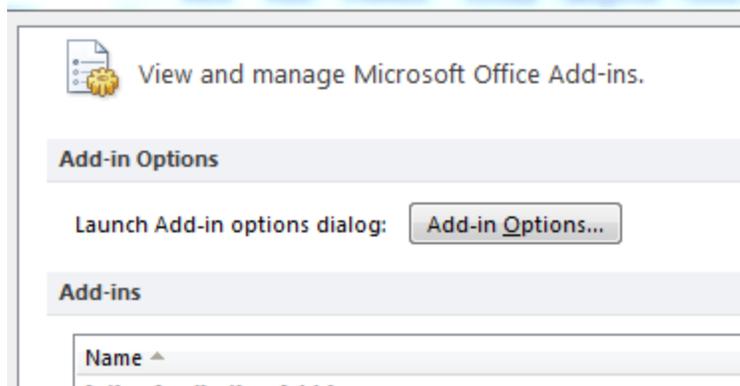
- 13) From the **File** menu select **Options**



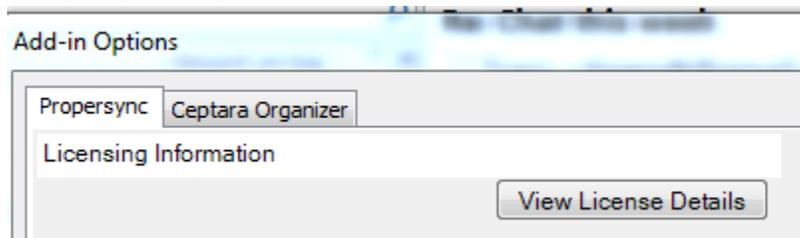
14) From the **Options** dialog box select **Add-ins**



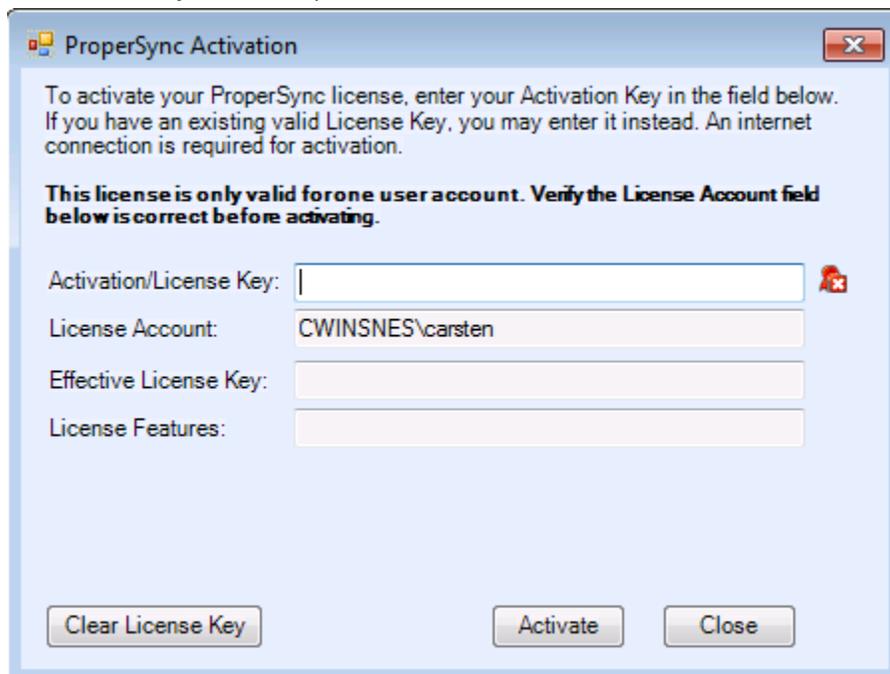
15) From the Add-ins sections select **Add-in Options...**



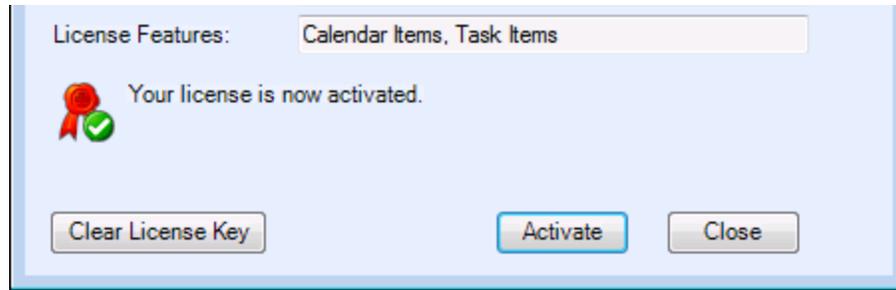
- 16) From the **Add-ins Options** dialog box select the **ProperSync** tab
- 17) From the ProperSync tab press the **View License Details** button



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



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



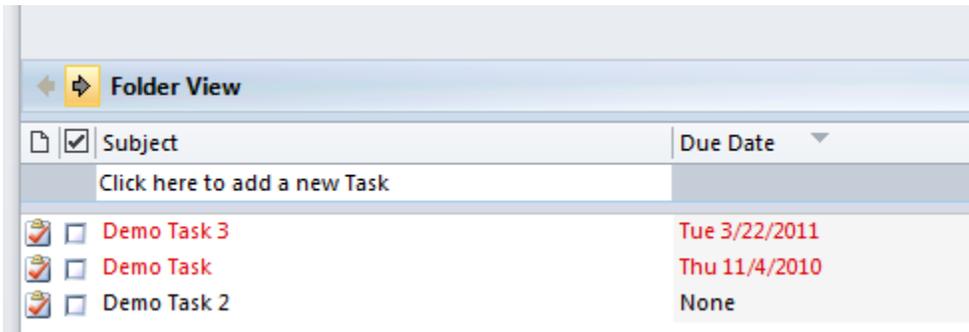
20) Click **Close** to close the **ProperSync Activation** dialog box

Using the ProperSync Grid View

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

To access the ProperSync grid view:

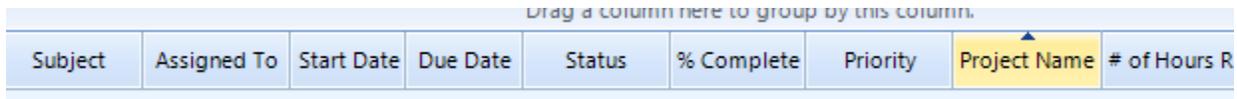
- 1) Click on a **SharePoint Task List** within **Microsoft Outlook**
- 2) Immediately above the tasks a blue bar with the text **Folder View** will appear



- 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:

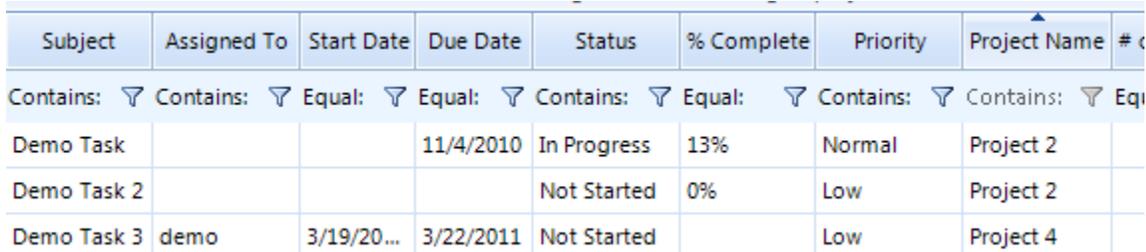


Drag a column here to group by this column.

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	# of Hours R
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 column here to group by this column.					
te	Status	% Complete	Priority	Project Name	# of Ho
▼ Contains: ▼	▼ Equal: ▼	▼ Contains: ▼	▼ Contains: ▼	▼ Equal: ▼	
l0	In Progress	13%	Normal	Project 2	
	Not Started	0%	Low	Project 2	
l1	Not Started		Low	Project 4	

Group by: Project Name										
S	Subject	Assigned To	Start Date	Due Date	Status	% Complete	Priority	Project Name	#	
▶	▼ Contains: ▼	▼ Contains: ▼	▼ Equal: ▼	▼ Equal: ▼	▼ Contains: ▼	▼ Equal: ▼	▼ Contains: ▼	▼ Contains: ▼	▼ Ec	
	▼	Project Name: Project 2								
	▼	Project Name: Project 4								

Click the ▼ symbol to expand the items in the group:

Group by: Project Name

S	Subject	Assigned To	Start Date	Due Date	Status	% Complete	Priority	Project Name	# o
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	Subject	Assigned To	Start Date	Due Date	Status	% Complete	Priority	Project Name	# o
Project Name: Project 2									
Project Name: Project 4									
	Demo Task 3	demo	3/19/20...	3/22/2011	Not Started		Low	Project 4	

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:

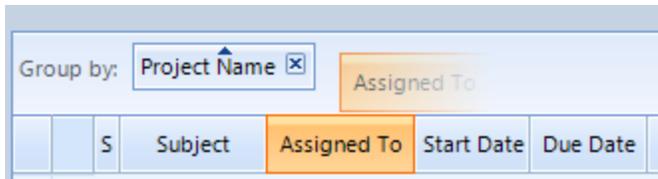
Only show items selected in Folder View

Group by: Project Name

S	Subject	Assigned To	Start Date

Group by: Project Name ↔ Assigned To

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



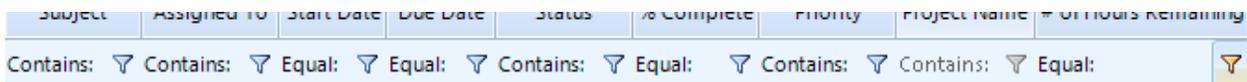
Filtering Fields

The following items cannot be filtered in ProperSync:

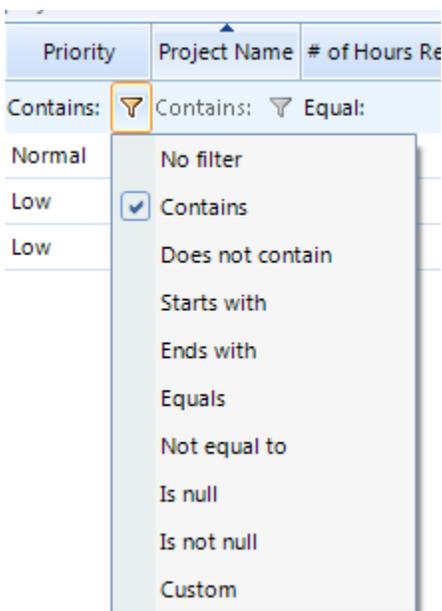
- Choice (Drop Down)
- Choice (Radio Buttons)
- Lookup

Future ProperSync updates will allow filtering on additional fields.

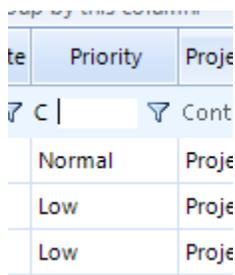
To filter items in the ProperSync grid view, use the row directly below the column headers:



Click on the  symbol to choose the filtering option:



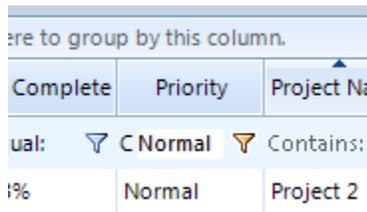
Once the filter option is chosen, click on or next to the operation (e.g. Contains).



The screenshot shows a grid with columns 'te', 'Priority', and 'Proje'. A filter dropdown is open over the 'Priority' column, showing the operation 'Contains'. Below the dropdown, the grid shows rows with values 'Normal' and 'Low' in the 'Priority' column.

te	Priority	Proje
	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.

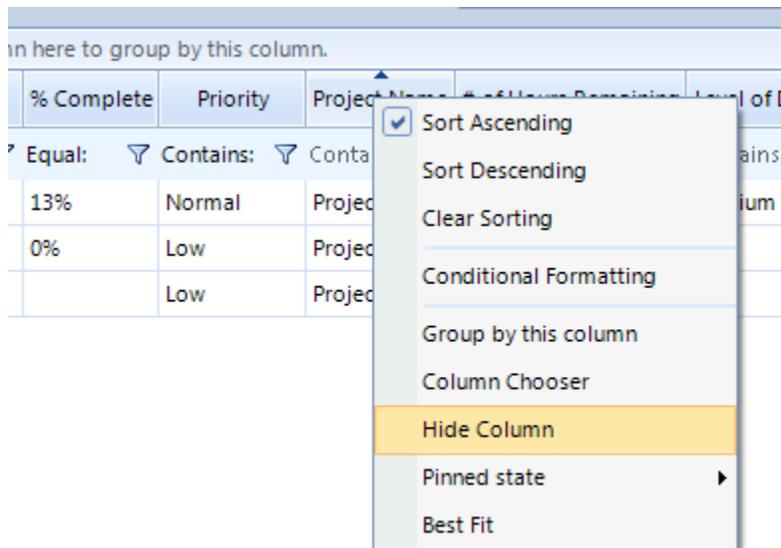


The screenshot shows a grid with columns 'Complete', 'Priority', and 'Project Na'. A filter dropdown is open over the 'Priority' column, showing the operation 'Contains'. Below the dropdown, the grid shows rows with values 'Normal' and 'Low' in the 'Priority' column.

Complete	Priority	Project Na
Equal: C	Normal	Contains:
13%	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 screenshot shows a grid with columns '% Complete', 'Priority', and 'Project Name'. A context menu is open over the 'Project Name' column header, listing various actions. The 'Hide Column' option is highlighted in yellow.

% Complete	Priority	Project Name	# of Hours Remaining	Level of D
Equal: C	Contains: C	Contains: C		
13%	Normal	Project		
0%	Low	Project		
	Low	Project		

- Sort Ascending
- Sort Descending
- Clear Sorting
- Conditional Formatting
- Group by this column
- Column Chooser
- Hide Column**
- Pinned state
- Best Fit

The column will then be hidden from the view:

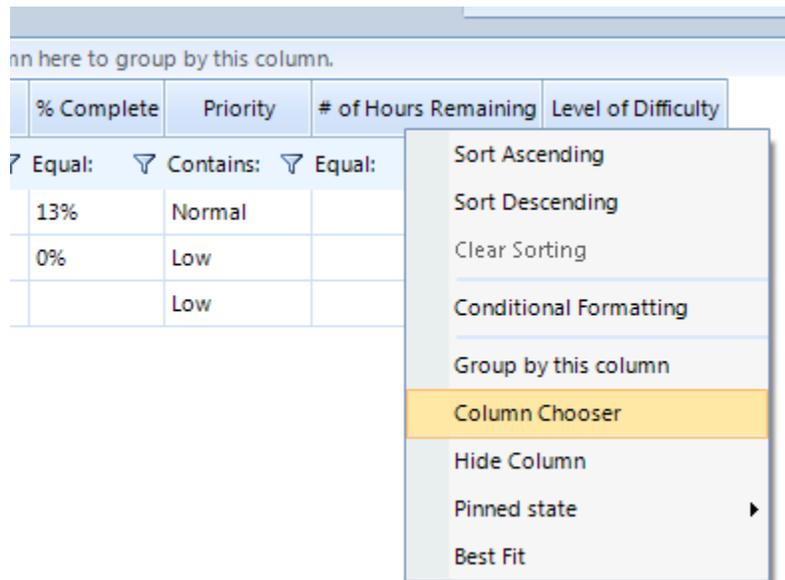
show items selected in Folder View

Drag a column here to group by this column.

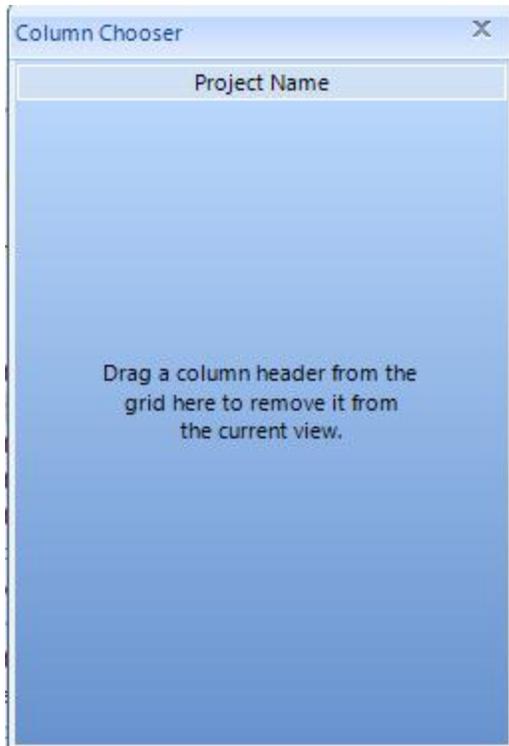
Subject	Assigned To	Start Date	Due Date	Status	% Complete	Priority	# of Hours Remaining
Contains: ▾	Contains: ▾	Equal: ▾	Equal: ▾	Contains: ▾	Equal: ▾	Contains: ▾	Equal: ▾
Demo Task			11/4/2010	In Progress	13%	Normal	
Demo Task 2				Not Started	0%	Low	
Demo Task 3	demo	3/19/20...	3/22/2011	Not Started		Low	

Show Columns

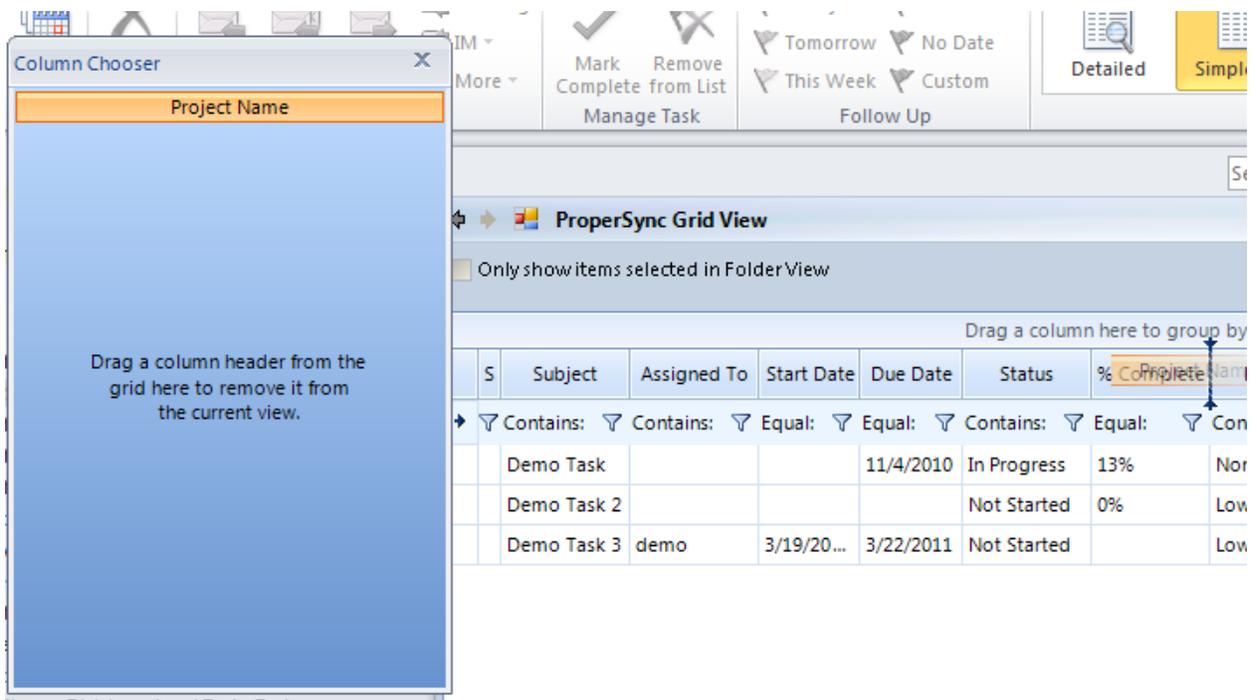
To show columns in the ProperSync grid view, use the grid's **Column Chooser** tool. To access the column chooser, right click on any column header and choose **Column Chooser** from the **context menu**.



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.



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 column here to group by this column.									
Project Name	Subject	Assigned To	Start Date	Due Date	Status	% Complete	Priority	# of Hours	
Contains:	Contains:	Contains:	Equal:	Equal:	Contains:	Equal:	Contains:	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		

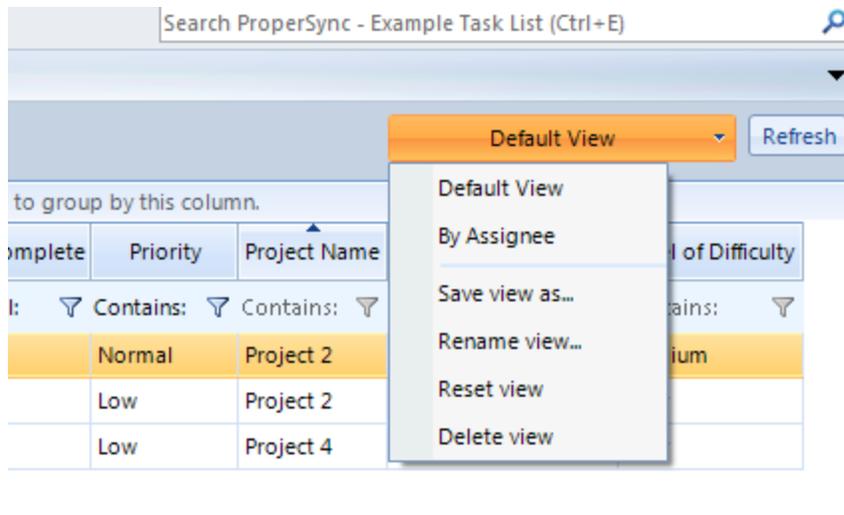
Once the column is in the correct spot, let go of the mouse to set the column position

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

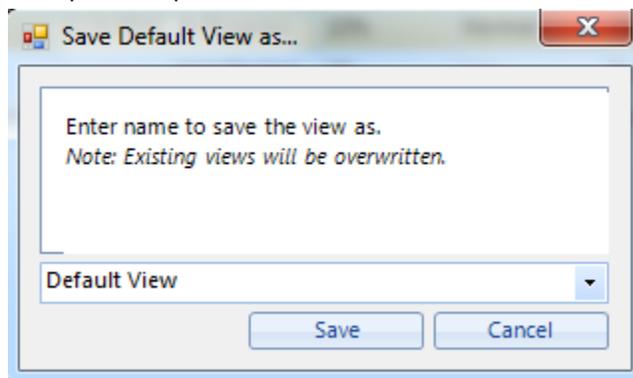
Creating Custom Views

To create a custom view within the ProperSync grid view:

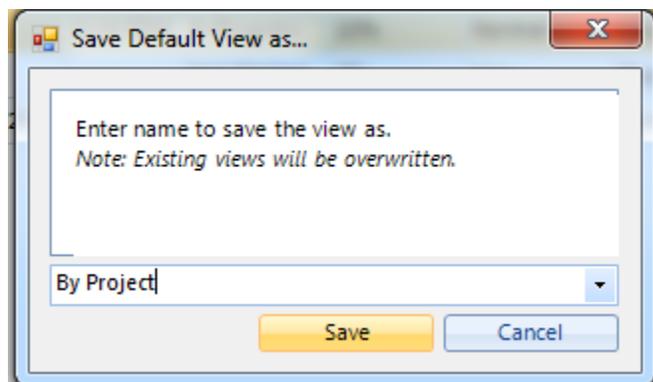
- 1) Click on the view dropdown box located in the upper right hand corner of the ProperSync grid view



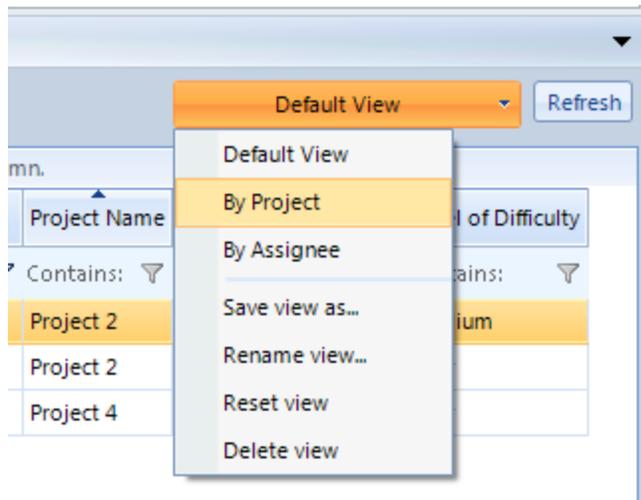
- a.
- 2) From the dropdown options select **Save As**



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

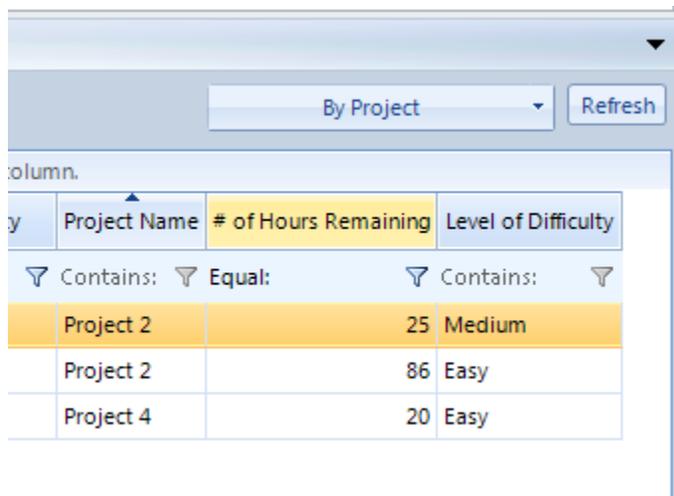


- a.
- 4) The new view will appear in the view dropdown box



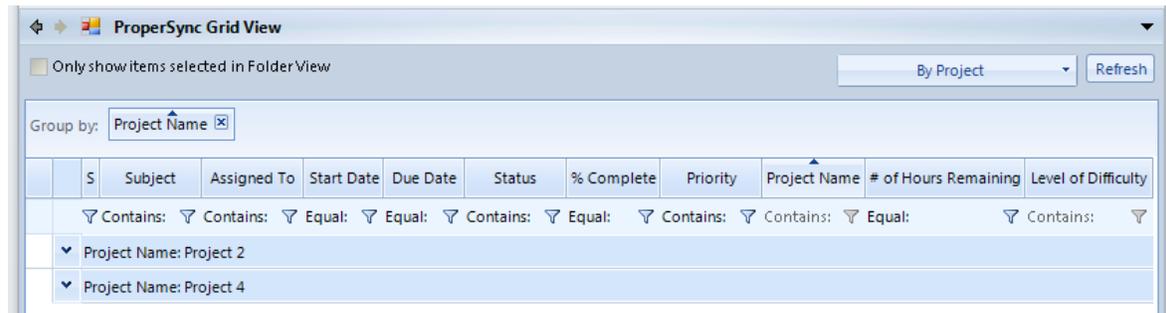
a.

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



a.

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

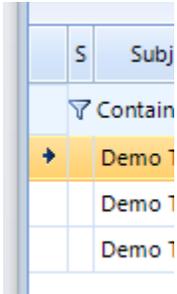


a.

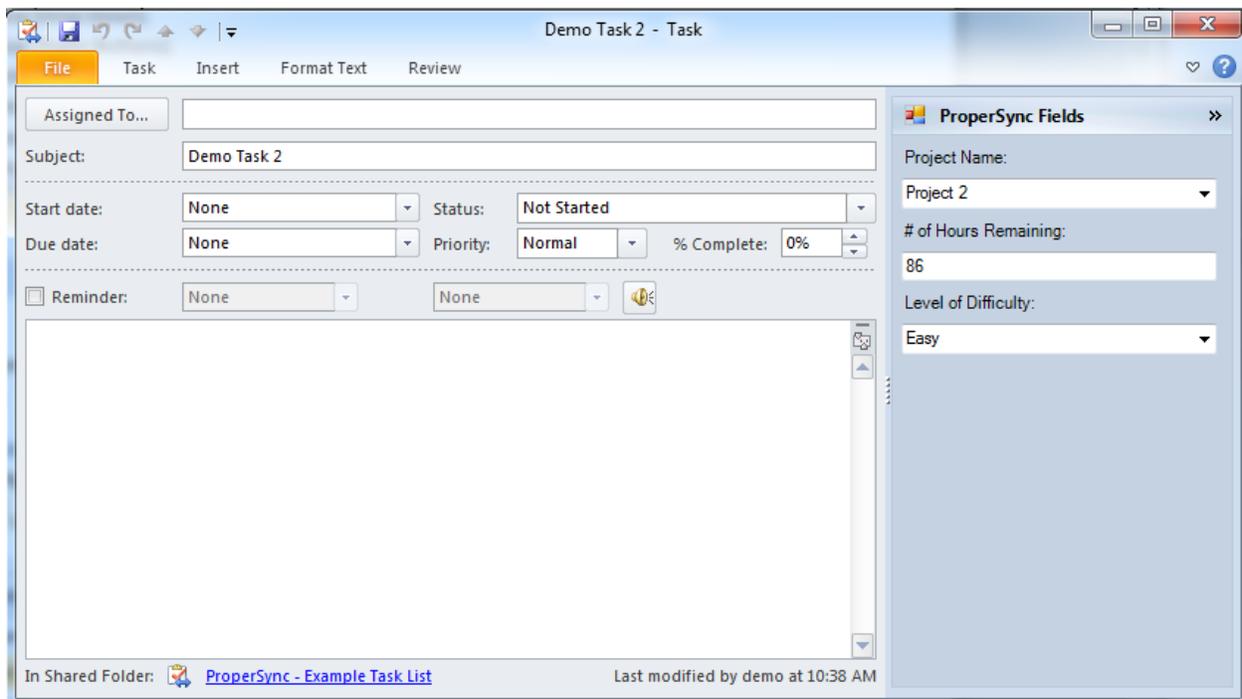
- 7) The ProperSync grid view will automatically save the view settings. Switching back to **Default View** will show the list ungrouped

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:



The Outlook item form will open for the item selected:



Refresh Grid View

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

