# **1. Introduction to SharePoint List Sync:**

List Sync is a SharePoint add-on that allows users to sync lists in a same or different site.

List Sync syncs any item creation, modification, and deletion from source list to the target list and also sync modifications from target list back to the source list. List Sync activity can be tracked and viewed with downloadable activity logs in Microsoft Excel file.

# 2. Sync profile

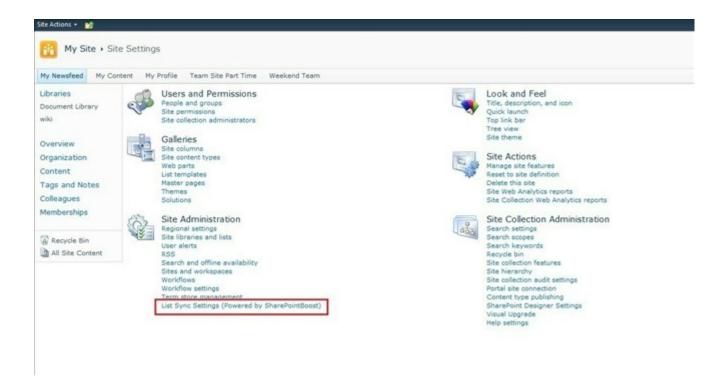
A sync profile is a set of commands and conditions set by the user for syncing items from source list to target list.

## 2.1. Creating a sync profile

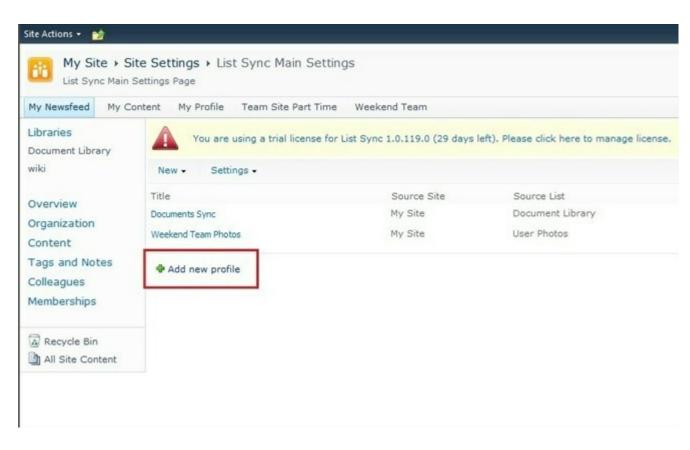
a. Click Site Actions > Site Settings

Site Acti	ons - Page	
	Edit Page Modify the web parts on this page.	
	New Document Library Create a place to store and share documents.	
	New Site Create a site for a team or project.	
	More Options Create other types of pages, lists, libraries, and sites.	
	View All Site Content View all libraries and lists in this site.	
*	Edit in SharePoint Designer Create or edit lists, pages, and workflows, or adjust settings.	
	Site Permissions Give people access to this site.	
¢°	Site Settings Access all settings for this site.	

b. Click List Sync Settings



c. Click Add New Profile to create a new sync profile



#### 2.2. Setting up Sync Profile

2.2.1. Type a Profile Title

This is the title of your sync profile (e.g. Documents Sync, Budget Folders etc.).

Profile Title	-	
Type a title for your new profile.	1	

Tip: Try to name your profile words that are relevant to the sync conditions or files so it would be easier to distinguish your profiles in the future.

2.2.2. Select Source Site and List

Choose specific Source Site and List from the dropdown menu. Information transmitted to the target list is referred from here.

Note: You can sync all SharePoint lists except: Discussion Board, Survey List, Wiki Page Library, External List, Slide Library, and SharePoint default Gallery (Web Part Gallery, List Template Gallery, Master Page Gallery, Theme Gallery)

Source Site and List	Source Site
Specify source site and list for your profile.	-My Site
	Source List
	Select a list Select a list Customized Reports Document Library Form Templates Organization Logos
Target Site and List	Ta User Photos
Specify target site and list for your profile.	wiki
	Target List
	Select a list

### 2.2.2.1. Item Sync Filter

This is a sync feature where items are only synced when it matches conditions in source list. By checking the Item sync filter, you may choose between a Basic Condition and Advanced Condition.

	Source Site			
Specify source site and list for your profile.	-Demo	-		
	Source List			
	SourceList	•		
	<b>F</b>			
	Item sync filter			
	Condition Category:			
	C Basic 💿 Advanced			
	Condition Help			
	[Insert column]	[Insert operator]	×	[Insert function]
	[Insert column] Column Help	[Insert operator]     Operator Help	×	[Insert function] 💌 Function Help
			×	

## 2.2.3. Target Site and List

This is the location where the Source list would sync its items or documents to.

t Site -Weekend Team
t List
nouncements 🗾
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### 2.2.4. Columns Mapping

Several dropdown menus for Source List and Target List are available to map the sync to. Other columns can be synced reversely.

**Reverse Sync** –if this checkbox is ticked, whatever modifications made on the Target List will be synced back to the source list for this column.

However, some columns cannot Reverse Sync, for the reason:

- If Source Column can be found in Target Column but a column in Target cannot be found in Source;
- Columns that are found only in Source List.

Tip:You can start mapping which columns to sync once the Source and Target lists are set.

Columns Mapping	Columns in Source Li	st	Columns in Target L	ist	Reverse Sync	
Map columns between source list and target list.	Check In Comment(Lookup)	*	Copy Source(Single line of te	ext) •		•
	Modified(Date and Time)		Modified(Date and Time)			0
	Name(Single line of text)		Name(Single line of text)	-	V	0
	Title(Single line of text)	*	Title(Single line of text)	*	1	0

Generally, source columns can be synced only to related target columns.

# Here is a quick look at which target folders are available to sync for each source

Source/Union List Column Type	Target List Column Type
Single Line of Text	Single Line of Text; Plain Text; Rich Text; Enhanced Rich Text
Plan Text	Plain Text; Rich Text; Enhanced Rich Text
Rich Text	Rich Text; Enhanced Rich Text
Enhanced Rich Text	Enhanced Rich Text
Choice	Single Line of Text; Plain Text; Rich Text; Enhanced Rich Text; Choice; Choice (Multiple Value)
Choice (Multiple Value)	Single Line of Text; Plain Text; Rich Text; Enhanced Rich Text; Choice (Multiple Value)
Number	Single Line of Text; Plain Text; Rich Text; Enhanced Rich Text; Number
Currency	Single Line of Text; Plain Text; Rich Text; Enhanced Rich Text; Currency
Date and Time	Single Line of Text; Plain Text; Rich Text; Enhanced Rich Text; Date and Time
Lookup	Single Line of Text; Plain Text; Rich Text; Enhanced Rich Text; Lookup; Lookup (Multiple Value)
Yes/No	Single Line of Text; Plain Text; Rich Text; Enhanced Rich Text; Yes/No
Person and Group	Single Line of Text; Plain Text; Rich Text; Enhanced Rich Text; Person and

	Group
Hyperlink and Picture	Single Line of Text; Plain Text; Rich Text; Enhanced Rich Text; Hyperlink and Picture
Managed Meta Data	Single Line of Text; Plain Text; Rich Text; Enhanced Rich Text; Managed Meta Data
Recurrence	Single Line of Text; Plain Text; Rich Text; Enhanced Rich Text; Recurrence
Full HTML content with formatting and constraints for publishing	Enhanced Rich Text; Full HTML content with formatting and constraints for publishing
Image with formatting and constraints for publishing	Enhanced Rich Text; Image with formatting and constraints for publishing
Hyperlink with formatting and constraints for publishing	Enhanced Rich Text; Hyperlink with formatting and constraints for publishing
Content Type	Single Line of Text; Plain Text; Rich Text; Enhanced Rich Text; Content Type

## Listed below are columns that can only be found in Source List

- Site Link;
- List Link;
- Item Link;
- ID;
- Workflow Status;
- Version;
- Approval status;
- Check In comments;
- Folder Child Count;
- Item Child Count;
- Check Out To;
- File Size;
- Picture Size;
- Picture Height;
- Picture Width.

### Other special column

- Modified: If target column is "Modified", then source column can only be just "Modified"; reverse sync is not possible.
- Modified By: If target column is "Modified By", then source column can only be just "Modified By"; reverse sync is not possible.
- Created: If target column is "Created", then source column can only be just "Created"; reverse sync is not possible.
- Created By: If target column is "Created By", then source column can only be just "Created By"; reverse sync is not
  possible.

## 2.2.5. Union List

Union list is the list which is referred by a lookup column in source list. The columns in source list and Union list will sync to the target list.

#### How to set up Union List

Tick Union List checkbox to enable Union List function. Select Lookup Column in the source list from the dropdown menu. To map the union list, choose from the union list which columns you want to map with target list.

#### Note that different lookup column lead to different union list; therefore sync results in the target list are also different.

Union List Union list is the list which is referred by a lookup column in source list. The oolumns in source list and Union list will sync to the target list. Note that different lookup column lead to different union list; therefore sync results in the target list are also different. Example: Your Javie this list: List A and List B. List A has a lookup column which	Enable Union List Lookup Column: Predecessors     This column lookup to union list: Sour Map columns:	celist	
gets information from List B. In this way, we call List A - Source List, and List B	Columns in Union List	Columns in Target List	Reverse Sync
<ul> <li>Union List. Then, you can combine information from List A and List B to List C, which we call it target list. This feature makes one item in list C created when</li> </ul>	Select a column	Select a column	0
syndranizing is in function. If you set up sync settin	Select a column	Select a column	0
	Select a column	Select a column	0
	Select a column	Select a column	0

#### Example:

You have two lists: List A and List B. List A has a lookup column which gets information from List B. In this way, we call List A -Source List, and List B - Union List. Then, you can combine information from List A and List B to List C, which we call it target list. This feature makes one item in list C created when synchronizing is in function. If you set up sync setting for List A and List B with List C respectively, two items will be created in List C when synchronizing.

#### 2.2.6. Permission Synchronization

This is a setting where you can set access permissions among your collaborators in case there is certain information you want to restrict.

Permission Synchronization Specify whether to sync permission.	<ul> <li>Don't sync item permission</li> <li>Sync item's permission in source list</li> <li>Sync item's permission in union list</li> <li>Sync item's permission in source list or union list</li> <li>Sync item's permission in both source list and union list</li> </ul>
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## 2.2.7. Others

There are five checkboxes where you can choose conditions when to sync or delete target item, target column, target folder

#### structure and attachment according to Source activity.

Others Specify whether to delete target item when source item has been deleted, or to delete target item when source item doesn't match the condition, or to delete target column when the source column has been deleted, or to sync folder structure from source list to target list, or to sync attachment from source list to target list.	<ul> <li>Delete target item when the source item has been deleted</li> <li>Delete target item if the source item doesn't match the condition</li> <li>Delete target column when the source column has been deleted</li> <li>Sync folder structure from source list to target list</li> <li>Sync attachment from source list to target list</li> </ul>
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## 2.2.7.1. Each condition explained below:

• Delete target item when the source item has been deleted

When a source (e.g. folder) has been deleted, the target folder would also be deleted

• Delete target item if the source item doesn't match the condition

The condition here means the conditions set on Item Sync Filter.

• Delete target column when the source column has been deleted

Target column will also be deleted when the source column is deleted.

• Sync folder structure from source list to target list

A folder structure is how the files are organized in the certain sync folder. If you tick the checkbox, the folder structure will be synced to the target list as well as the files inside. If you do not tick the checkbox, only the files inside the folder will be synced to the target list.

• Sync attachment from source list to target list

If an item in the source list contains attachments, these attachments will also be synced to the item in target list.

### 2.2.8. Log Settings

A log is a written record of List Sync activities. Only one sync log is available to download as Excel file each time you sync a list.

To log your sync activities, tick the checkbox for Write List sync information to log. Schedule your log activity monthly or choose between 1-99 day(s) sync log interval.

Log Settings	
Specify whether to write log file to server when syncing, and specify a schedule for logging.	Write List Sync information to log List Sync Log Schedule options: Monthly C Every 7 days
	Delete logs from the server after 180 days
	View Logs

You may opt to delete logs from the server by ticking the checkbox for Delete logs from the server and input the number of days before the deletion.

Delete logs from the server after 180 days

# 3. Sync Now

List Sync automatically updates source and target lists in real-time.

However, you may choose to **manually sync** your source and target files yourself by viewing the List Sync Main Settings Page (Site Actions > Site Settings > List Sync Settings). Hover the profile you want to sync and a dropdown menu would appear, click the dropdown menu and select Sync Now to update your list.

List Sync Main S		am Site Part Time We	ekend Team	
Libraries Document Library wiki			vnc 1.0.119.0 (26 days	left). Please click here to manage license.
Overview Organization Content Tags and Notes Colleagues Memberships	Title Weekend Team Photos		Source Site My Site	Source List User Photos Document Library
	union	Sync Now	My Site	Customized Reports
	Add new profile     Add new profile	/		
Recycle Bin All Site Content		Deactivate Profile		