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.

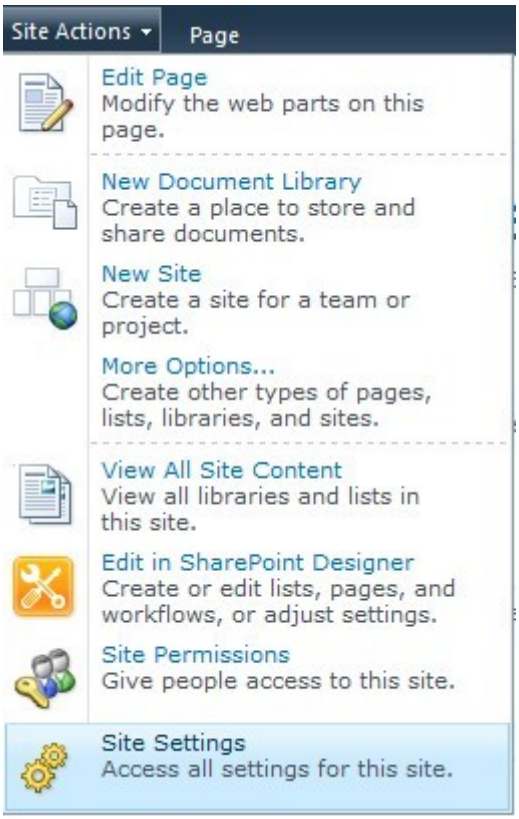
List Sync syncs any item creation, modification, and deletion from source list to the target list and also sync modifications from target list back to the source list. List Sync activity can be tracked and viewed with downloadable activity logs in Microsoft Excel file.

2. Sync profile

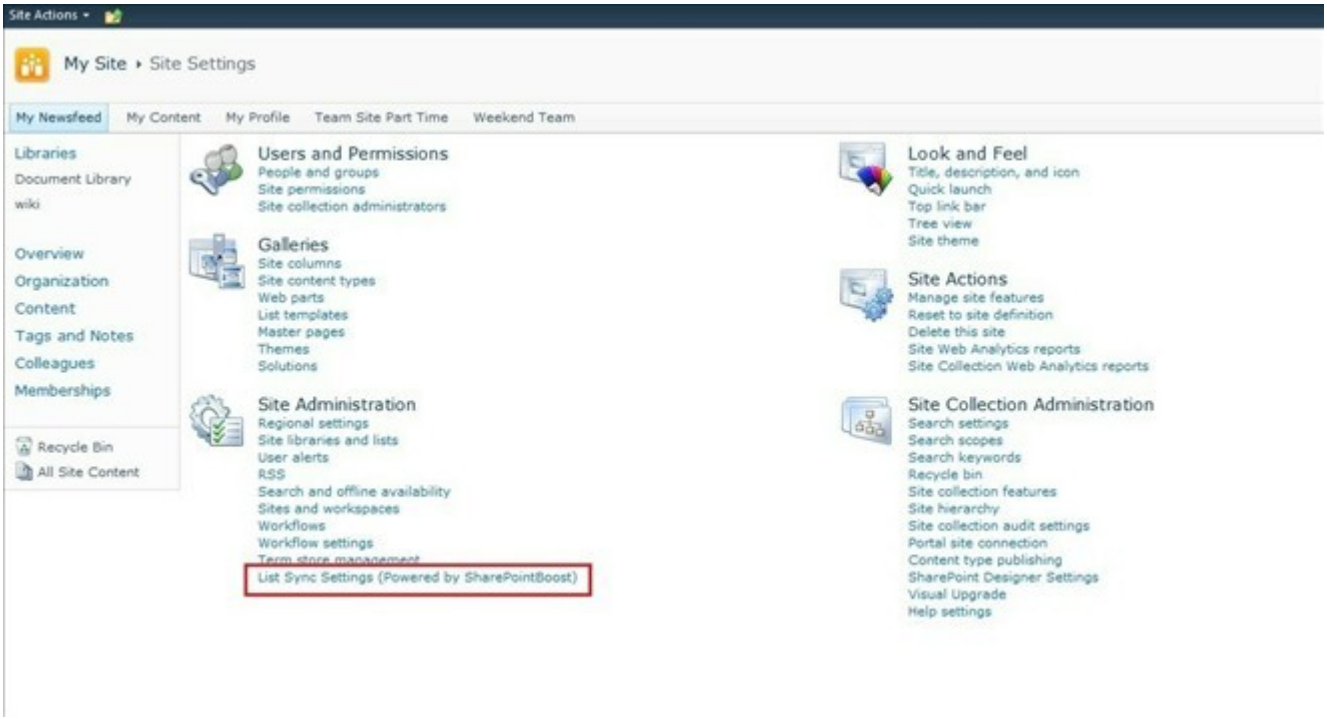
A sync profile is a set of commands and conditions set by the user for syncing items from source list to target list.

2.1. Creating a sync profile

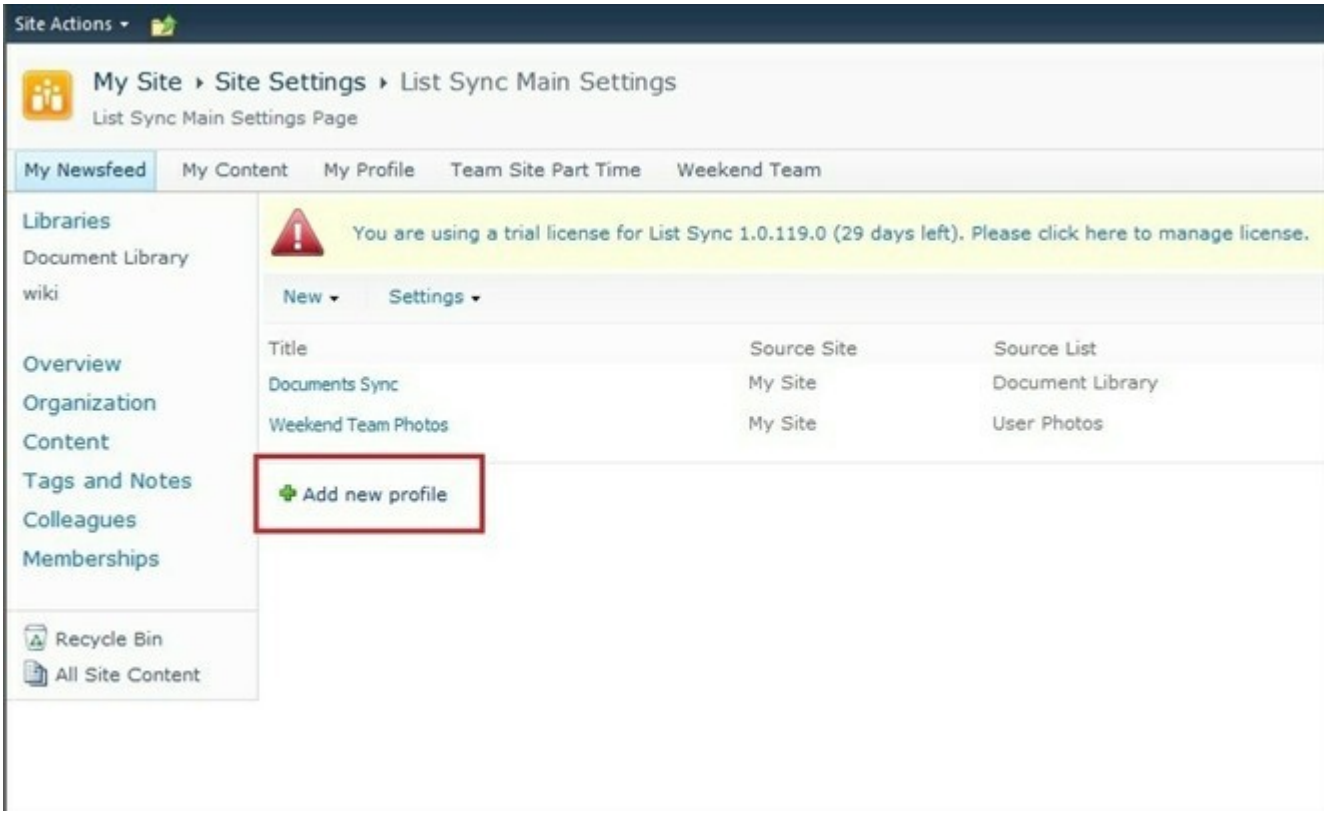
a. Click Site Actions > Site Settings



b. Click List Sync Settings



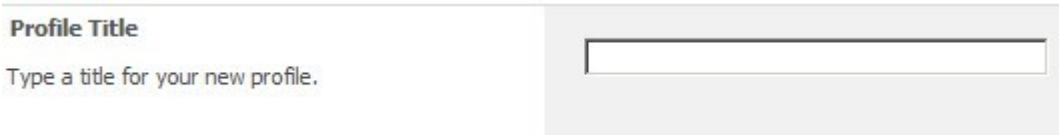
c. Click Add New Profile to create a new sync profile



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.).

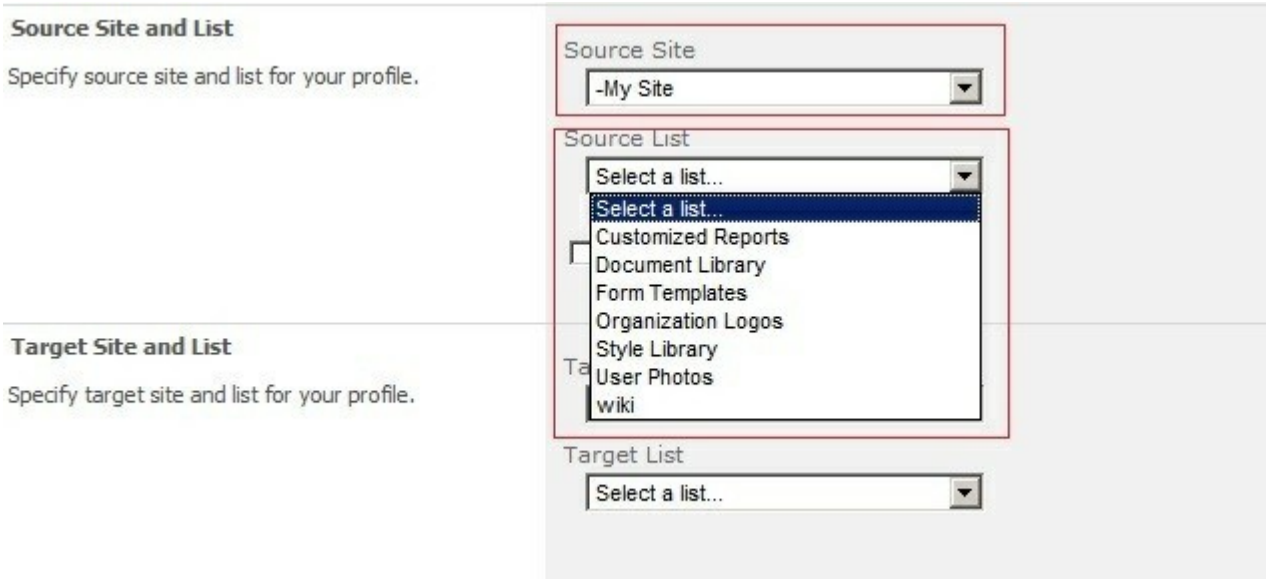


Tip: Try to name your profile words that are relevant to the sync conditions or files so it would be easier to distinguish your profiles in the future.

2.2.2. Select Source Site and List

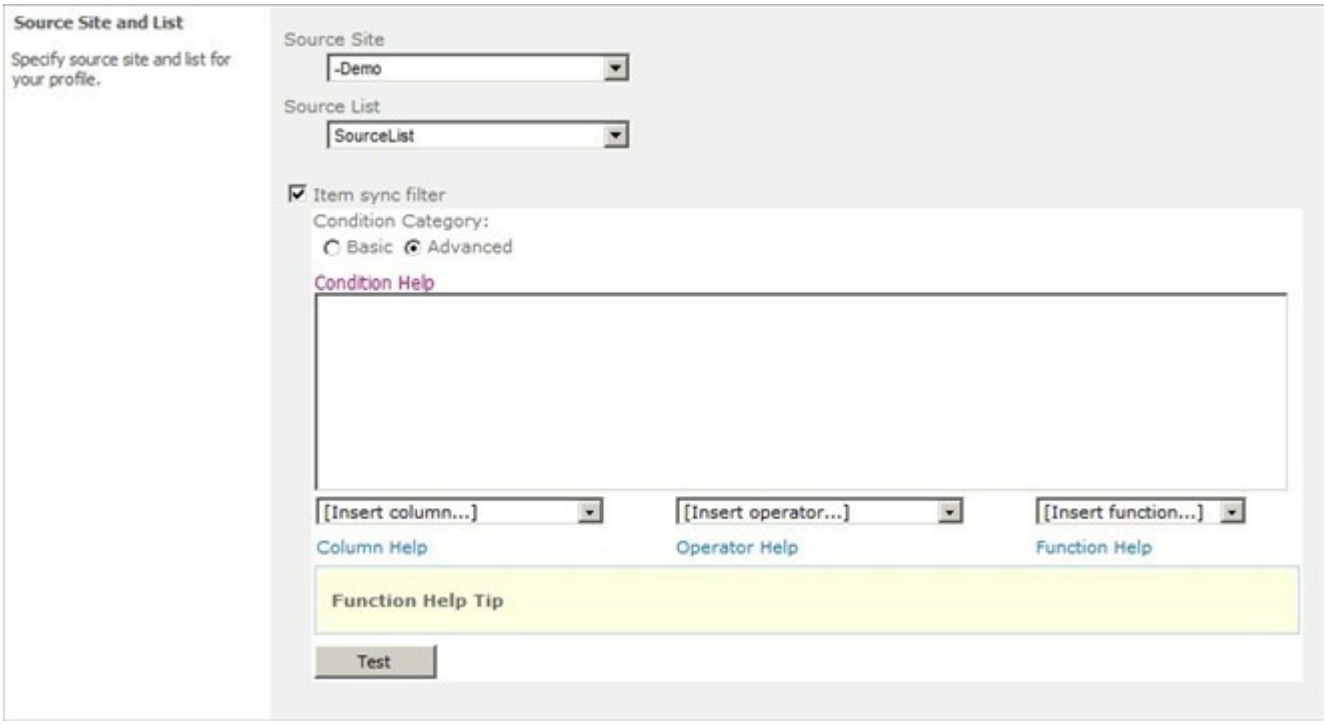
Choose specific Source Site and List from the dropdown menu. Information transmitted to the target list is referred from here.

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)



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.



2.2.3. Target Site and List

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

2.2.4. Columns Mapping

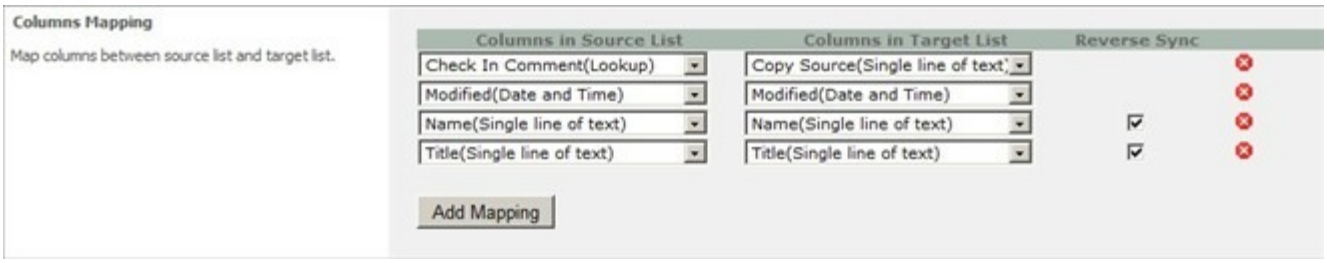
Several dropdown menus for Source List and Target List are available to map the sync to. Other columns can be synced reversely.

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.



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.

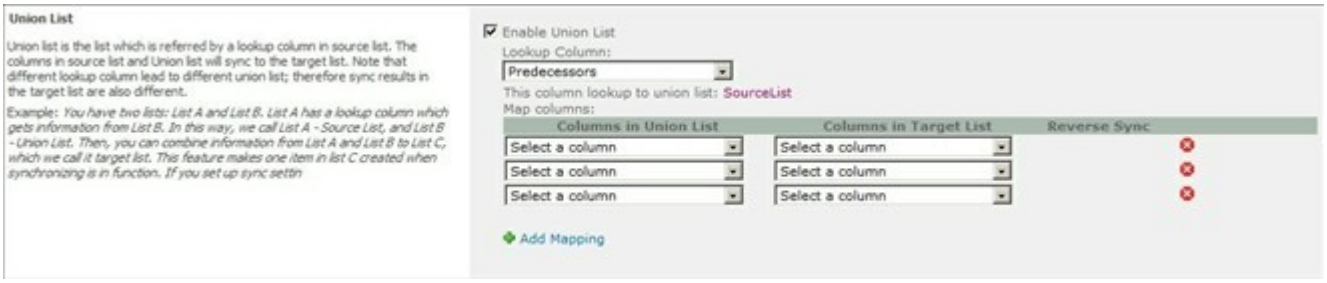
2.2.5. Union List

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.

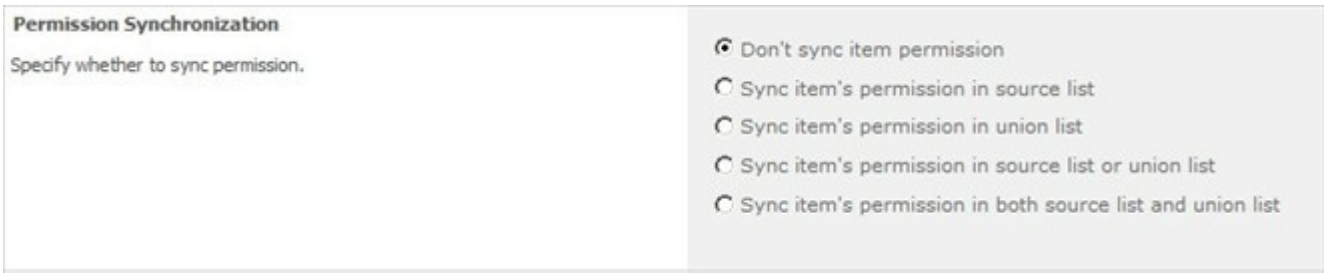


Example:

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.



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.

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.

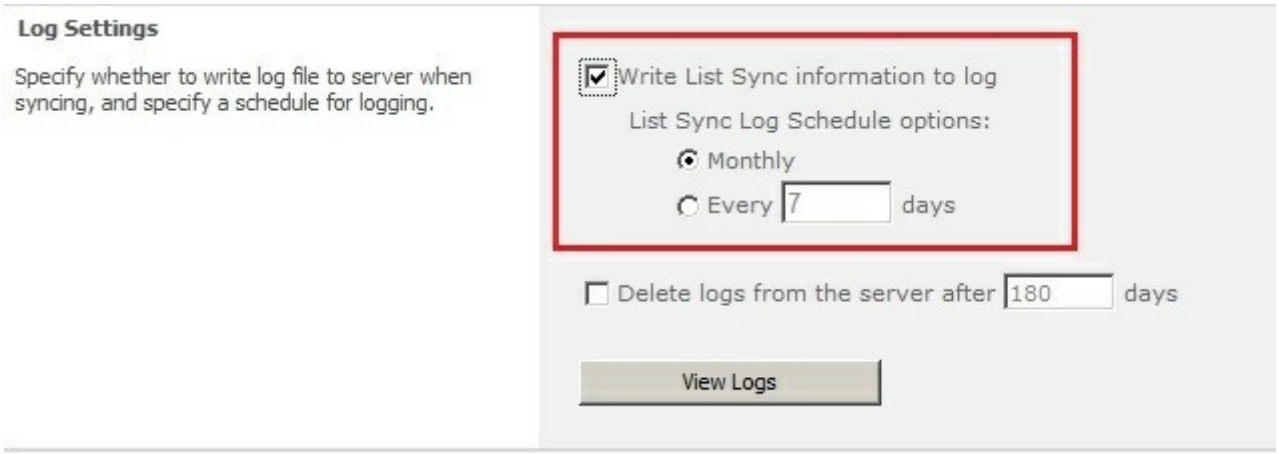
- Sync attachment from source list to target list

  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.

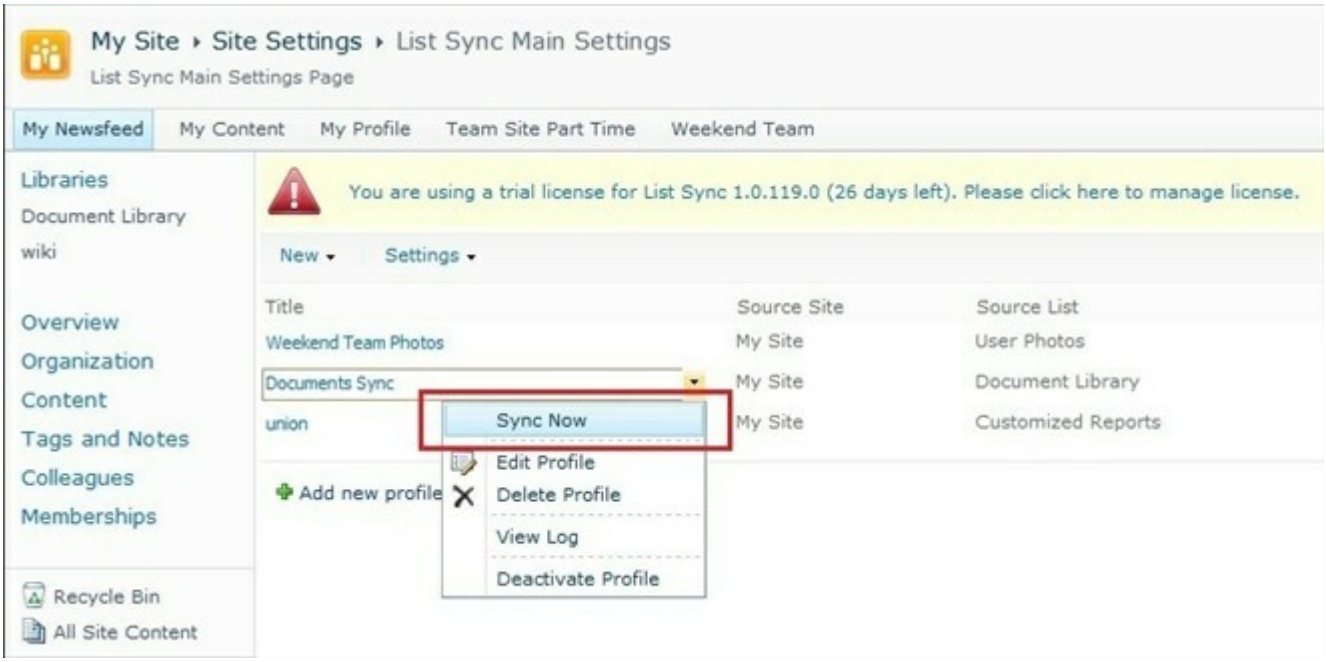


You may opt to delete logs from the server by ticking the checkbox for Delete logs from the server and input the number of days before the deletion.

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.


My Site ▸ Site Settings ▸ List Sync Main Settings
List Sync Main Settings Page
My Newsfeed
My Content
My Profile
Team Site Part Time
Weekend Team
Libraries
Document Library
wiki
Overview
Organization
Content
Tags and Notes
Colleagues
Memberships
Recycle Bin
All Site Content
You are using a trial license for List Sync 1.0.119.0 (26 days left). Please click here to manage license.
New
Settings
Title
Source Site
Source List
Weekend Team Photos
My Site
User Photos
Documents Sync
My Site
Document Library
union
My Site
Customized Reports
Add new profile
Sync Now
Edit Profile
Delete Profile
View Log
Deactivate Profile