

PPS Mobile!

Synchronising with MS Outlook – Getting Started

Introduction

You MUST read this documentation before installing and running PPS / MS Outlook Sync.

This document will guide you through the initial steps required to start synchronising your PPS system with MS Outlook.

The PPS / MS Outlook Sync program allows you to synchronise your PPS Appointments Details directly with the calendar in MS Outlook. If you have your handheld/PDA/smartphone already connected to your computer and synchronising with MS Outlook using Microsoft ActiveSync (or equivalent), then your PPS Appointments will automatically be transferred onto your portable device.

Requirements

To use this feature in PPS you must have MS Outlook installed onto your computer. In addition, if you are planning to synchronise appointments with your handheld/PDA/smartphone, you must also have Microsoft ActiveSync (Microsoft Sync Center on Vista) installed and working between your PC and your portable device (or equivalent for the Blackberry etc).

You also need to ensure that you are using at least v4.0.39 of PPS.

“PPS to MS Outlook Sync” will not work with Outlook Express as this does not have a calendar.

To run “PPS to MS Outlook Sync” you will need to purchase an update to your current registration file. PPS Mobile is UK£50.00 (plus vat in the UK). You can use these features in unregistered mode to try them out. This has a limit of 5 appointments sent to Outlook.

Installation

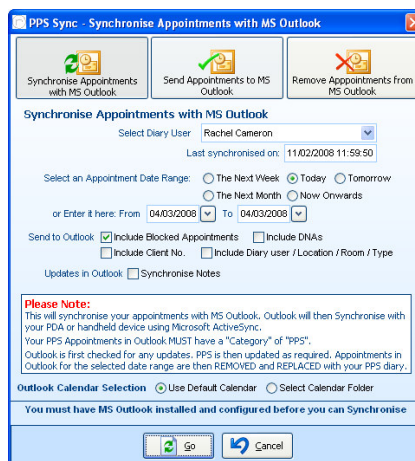
To install PPS / MS Outlook sync, we can send you a link to download the application file.

You should save the file directly onto the PC that you synchronise MS Outlook with your handheld device on.

The application file (called pps4-sync-outlook.exe) can be saved directly into the local PPS application folder – this is normally the PPSv4.0 folder on your local disk C drive.

Once you have saved the application file into the local PPSv4.0 folder, restart PPS. You will see that there is a new main menu option to the right of the help menu called “PPS Sync”.

On the “PPS Sync” menu option, select the “Synchronise with MS Outlook” option. This will display the following screen.



There are three options at the top of the screen. Selecting each option will change the middle portion of the screen to show the settings relevant to that option. The middle portion of the screen here shows the settings for “Synchronise Appointments with MS Outlook”. This is because the left hand button is selected at the top of the screen. Each of the three options is discussed below:

Synchronise Appointments with MS Outlook

You can select the Diary User to synchronise appointments for. This will normally be yourself if you want to synchronise your own appointments with MS Outlook.

Select the date range – you can select from a range of popular date options such as “The Next Week” – this will populate the From and To dates for you. You must enter a “From” date, but you can leave the “To” date blank – this will synchronise All Future appointments with MS Outlook.

You can select which appointment details to send to the Outlook calendar. This will affect the detail that is shown in the “notes” against each Outlook calendar item.

Synchronise Notes: This means that any changes you may have made to the Notes section in Outlook will be updated in the Notes against the PPS Appointment. If you select this option, you will see an additional security warning in Outlook during the synchronisation process. This is for Outlook to allow PPS to read these details from the Outlook calendar and is a standard Microsoft Security Warning.

Outlook Calendar Selection: it is possible for you to have several calendars available in MS Outlook. This option allows you to select exactly which calendar in Outlook to synchronise with.

Click the GO button when you are ready to synchronise. PPS will then synchronise with Outlook using the rules as described on Page 3 of this document. You will see progress information on the screen. Once the synchronisation is complete, you will see a confirmation of how many appointments were updated in both Outlook and PPS.

Send Appointments to MS Outlook

You can select the Diary User to send appointments for. This will normally be yourself if you want to send your own appointments to MS Outlook.

Select the date range – you can select from a range of popular date options such as “The Next Week” – this will populate the From and To dates for you. You must enter a “From” date, but you can leave the “To” date blank – this will copy All Future appointments to MS Outlook.

Whenever appointments are sent to MS Outlook, all existing PPS Appointments in MS Outlook, for the same date range, are removed first before the new appointments are sent.

Outlook Calendar Selection: it is possible for you to have several calendars available in MS Outlook. This option allows you to select exactly which calendar in Outlook to synchronise with.

Click the GO button when you are ready to send appointments. After the appointments have been sent (it only takes a few seconds) you will see a confirmation of how many existing appointments were removed and how many new appointments were sent.

Remove Appointments from MS Outlook

Select the date range – you can select from a range of popular date options such as “The Next Week” – this will populate the From and To dates for you. You must enter a “From” date, but you can leave the “To” date blank – this will remove All Future PPS Appointments from MS Outlook.

Outlook Calendar Selection: it is possible for you to have several calendars available in MS Outlook. This option allows you to select exactly which calendar in Outlook to synchronise with.

Click the GO button when you are ready to remove appointments. After the appointments have been removed (it only takes a few seconds) you will see a confirmation of how many existing appointments were removed.

IMPORTANT: If you are Synchronising with Outlook (rather than just Sending or Deleting), then this means that Appointments you Add, Update, or Delete in Outlook will also be updated in PPS (following the rules described overleaf). Any appointments that are DELETED in Outlook are marked as DNA in PPS with a reason of “Deleted in

Outlook” rather than actually deleted from the PPS diary. You can then delete the appointment from the PPS diary yourself if required.

Rules for Synchronising PPS Appointments with MS Outlook

The PPS / MS Outlook Sync screen has 3 options: Synchronise, Send and Delete. These notes apply to the “Synchronise” option.

- 1) All appointments in Outlook MUST have a “Category” of “PPS”.
 - a. If the category is not set to PPS then the appointment will NOT synchronise. This means that you will need to add “PPS” as a standard category in Outlook.
 - b. Each time you add a new appointment to Outlook you must select PPS in the Category (the category is located to the bottom right of the appointment screen in Outlook – it will be more convenient to add PPS as a standard category)
- 2) Appointments “added to” or “updated in” Outlook will only synchronise the following information back to PPS
 - a. Date
 - b. Time
 - c. duration
 - d. Subject (this should be used for the client name only)
 - e. Notes – You must select specifically to synchronise notes. This is because the notes entry in Outlook is “security protected”. You will be asked to accept a security warning on the Outlook screen when you synchronise notes.
- 3) Appointments that are deleted in MS Outlook are only deleted in PPS provided that they remain in your Outlook “Deleted Items” folder.
 - a. Appointments in MS Outlook are marked in PPS as DNA with a reason of “Deleted in Outlook”. They are not physically deleted in PPS. If you want to physically delete these from the PPS diary, you must delete each appointment in PPS separately.
 - b. Please make sure that Outlook is not configured to “empty” the deleted items folder when you exit Outlook. This is set in the Tools > Options > Other tab.
 - c. If you need to empty your deleted items folder, please make sure that you synchronise with PPS first. It is then OK to empty your deleted items folder.
 - d. NEVER delete an appointment in Outlook unless you are happy for the same appointment to be deleted in PPS.
- 4) When PPS Synchronises with Outlook, the following takes place in the following order:
 - a. ALL Deleted items are checked in Outlook (irrespective of date range) and appointments are deleted (DNA’d) in PPS as necessary. Once the deleted items in Outlook are checked, they are marked so that they are not checked again next time.
 - b. Your Outlook calendar is checked for “PPS” appointments (between the selected date range), any that have been updated since you last synchronised are updated in PPS
 - c. All Outlook “PPS” appointments are removed (between the selected date range)
 - d. All PPS appointments (between the selected date range) are sent to Outlook
- 5) You can only synchronise your Outlook calendar for one PPS diary user at a time. If you have multiple calendars in Outlook, you can select the option in the PPS Outlook Sync screen to “Select Calendar Folder” to synchronise with.
- 6) When selecting to synchronise “notes”: When appointments are initially sent to Outlook from PPS, selected information is placed in the notes field in Outlook against the appointment. This includes the Client Address, Telephone Numbers, Appointment Type, etc. If this appointment is updated in Outlook, then the contents of the notes field will be updated against the Notes on the PPS Appointment. If you do not want this information transferred to the Notes field on the PPS Appointment, then remove it from the notes field in Outlook whilst you are updating the appointment.
- 7) Each time you synchronise for a selected PPS Diary User, a Date / Time stamp is updated so that PPS knows when it last synchronised for this user. This Date / Time can be changed if required before synchronising. The date and time is displayed next to the selected diary user on the PPS Outlook Sync screen.
- 8) If an appointment appears to have been updated in both Outlook *and* PPS since you last synchronised you will receive a prompt on screen during the synchronising process asking if you want to update the PPS

appointment with the Outlook details. Select Yes or No as appropriate. If you select “No” then the Outlook appointment will be removed and replaced with the PPS one during the remainder of the synchronising process.

- 9) We do not recommend that you synchronise PPS with more than one copy of Outlook, or synchronise Outlook with more than one copy of PPS (for example at home and at work). This is because PPS maintains a note of when each user last synchronised – this could lead to confusion when synchronising and result in appointments being updated or deleted incorrectly.
- 10) We would always recommend that you back up your PPS database before synchronising. The software cannot be held responsible for appointments that are updated or deleted as a result of synchronising. All updates and deletions are updated in the PPS Audit log.
- 11) It is important for you to maintain a “controlled” approach to your use of PPS Appointments in Outlook. For example, be aware that you are always working within a selected date range. This means that an appointment that you have moved from one date to another outside the selected date range may result in a duplicate appointment being created (in this example, trying to delete the duplicate in MS Outlook would then delete the original in PPS!)
- 12) These rules have been set to partly to assist you in controlling the synchronising of your appointments between PPS and Outlook, and also to work within general guidelines and restrictions normally applied to synchronising data between two systems.