



# Procore to SharePoint integration FAQs

## [About the Procore to SharePoint integration](#)

### [Technical Details - Initial Setup](#)

- [Where do I login to change settings / setup the integration?](#)
- [Can I choose which Procore projects to sync to SharePoint?](#)
- [Can you support multiple companies in Procore?](#)
- [What can be synced from SharePoint to Procore?](#)
- [Where is the data saved in SharePoint?](#)
- [Can multiple people use the integration?](#)
- [Can I change the Folder structure in SharePoint?](#)
- [I connected both of my accounts but I can't see any files in SharePoint?](#)

### [Technical Details - Regular Sync](#)

- [Can I rename file names when they are in my SharePoint account or Procore?](#)
- [How often does the sync run?](#)
- [What if I already have a SharePoint folder for the project?](#)
- [What if I want only certain folders or files synced from SharePoint or Procore?](#)
- [Are there any limits to how much data can be synced?](#)
- [What if I need to change the SharePoint Account?](#)
- [How quickly does the data sync? What is your sync speed?](#)
- [Can I rename my files in SharePoint?](#)

### [Best practices around the integration](#)

- [Do not have any trailing spaces at the end of folders or project names](#)
- [Make sure your team does not change the first three levels of folders in the SharePoint Folders.](#)
- [Do not rename the name of the top-level project name in Procore](#)
- [Note: if you need to delete a large number of files](#)
- [Can I buy additional space? I'm getting an out of space error?](#)
- [Some of my folders look different or have not been synced?](#)

### [Pricing / Accounts / SyncEzy-related questions](#)

[How does your pricing work?](#)

[Does SyncEzy keep a copy of my data stored?](#)

[Where is SyncEzy hosted?](#)

[Do the files transferred into cloud storage count towards my cloud storage account storage limits?](#)

[How long does it take to transfer my files across?](#)

[What triggers the files being transferred?](#)

[Where do I go to check the settings and billing details on my cloud storage integration?](#)

[Is there a limit on how many files can be synced in an hour?](#)

[What tools can be integrated from Procore to SharePoint?](#)

#### [Other questions](#)

[Have a support question?](#)

[Have you done this before and what about security of data?](#)

[What if I need to use a different cloud storage system other than SharePoint?](#)

[What if I use a different project management system?](#)

[What if I use a different cloud storage system?](#)

This document addresses the variety of questions we encounter while helping clients. If you have a question that's not addressed here please write to us at [support@syncezy.com](mailto:support@syncezy.com)

# About the Procore to SharePoint integration

Share Link - <https://syncezy.com/procore-sharepoint-integration/faqs>

**Is this tool 100% web-based, or do we need to install an application on a desktop or server?**

This is 100% web-based, we integrate the data directly into Sharepoint via its API, the individual users don't have to install any SyncEzy apps to their local machines.

**We're going to be turning on multi-factor authentication in SharePoint. Will this cause any issues?**

No, only the site admin has to authenticate SharePoint during the initial setup. Once set up the other users simply log in to their normal SharePoint / OneDrive / MS Teams account. The Two-factor auth on users has no effect on the integration.

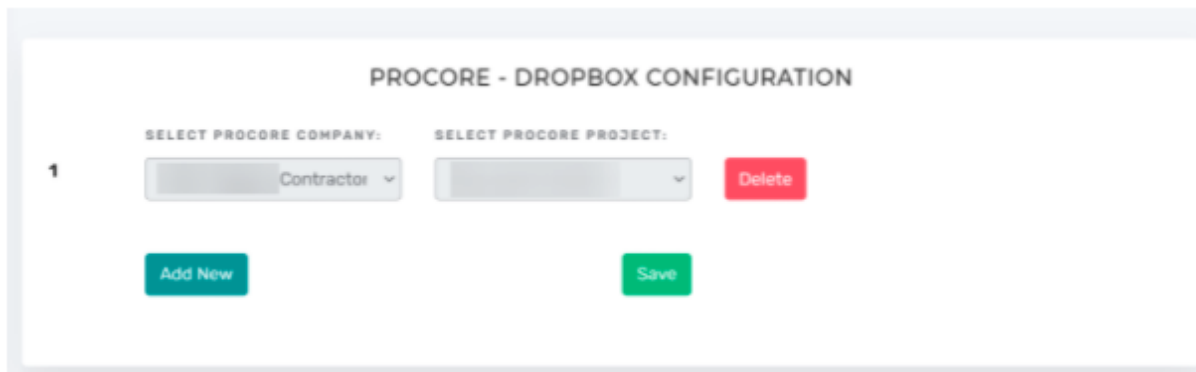
## Technical Details - Initial Setup

**Where do I login to change settings / setup the integration?**

Login link to the SyncEzy integrations portal: [integrations.syncezy.com](https://integrations.syncezy.com)

**Can I choose which Procore projects to sync to SharePoint?**

Yes. The integration Portal has a configuration settings area where this can be configured. You can sync projects from multiple Procore Companies to a single SharePoint account. Or have multiple app subscriptions and connect them to different SharePoint accounts.



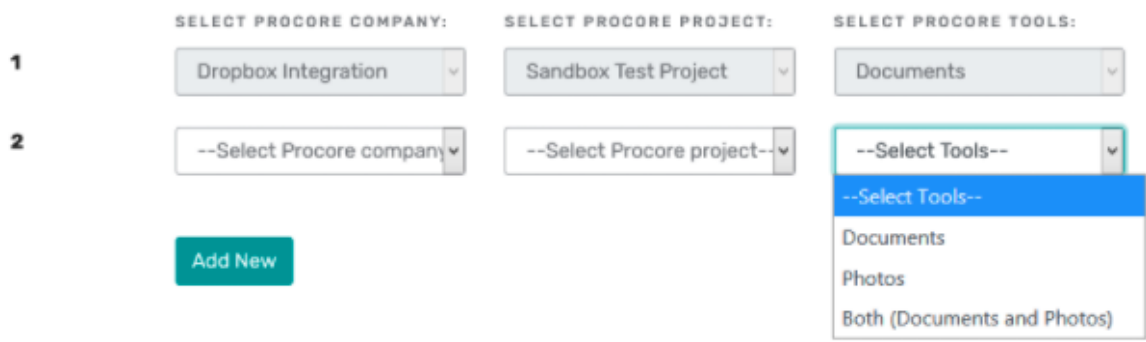
## Can you support multiple companies in Procore?

Yes. We can connect Projects from multiple Procore companies to a single organization's SharePoint Team folder.

## What can be synced from SharePoint to Procore?

Currently we can sync three tools from SharePoint to Procore.

- 1) The documents tool
  - 2) The photo tools
  - 3) The daily log or the site diary tool.
- We are working on options to be able to turn off certain tools from Syncing. For example, if you only want to sync Documents but not Photos. This functionality is currently in development.



## Where is the data saved in SharePoint?

The data is saved in a new Top Level Folder in your SharePoint account.

Go to SharePoint

(1): Look for a New Folder called : Procore in the top level Root Directory for SharePoint.

If you have recently connected the integration, it can take upto 15 minutes for the first folder to appear and then upto 24 to 48 hours or longer for the initial sync to complete (depending on the amount of data in your Procore Project). Roughly at the rate of 900 files per hour.

If you have less than 5 GB of data in Procore, typically the initial sync should take less than 24 hours to complete.

For example a 50 GB Project can take upto 5 days for the initial sync to complete. This is due to throttling limits from Procore and SharePoint.

### **Can multiple people use the integration?**

Yes, we do not restrict the number of users, once we sync the data into a SharePoint all of your SharePoint users can have access to the data. You can control different levels of access within SharePoint. Only the administrator needs to login to SyncEzy.

### **Can I change the Folder structure in SharePoint?**

Yes, you can change the folder structure inside a Project. At this stage, you cannot change the first three levels of the folder structure.

### **I connected both of my accounts but I can't see any files in SharePoint?**

Immediately upon connecting, our system will create a new folder called synczy.procore.com or Procore in your SharePoint home folder.

If you've just connected Procore it can take up to 24 hours for the initial sync to complete. You should start seeing data in the Procore folder within 15 minutes. Going forward, ongoing syncs happen every 30 minutes.

## Technical Details - Regular Sync

### Can I rename file names when they are in my SharePoint account or Procore?

Yes, you can rename the file within your SharePoint account. When you rename it, it will update in Procore in the next 5 minutes.

### How often does the sync run?

The sync runs every 30 minutes and is triggered when any changes are made to the documents folder in SharePoint.

### What if I already have a SharePoint folder for the project?

In order to maintain the integrity of the sync, we have to start the integration from scratch in a new top level folder in SharePoint. Once the initial sync is complete and the data structure is created in SharePoint, you can move your existing data from the existing folders into the synczy.procore.com folders created by SyncEzy.

### What if I want only certain folders or files synced from SharePoint or Procore?

This sort of custom integration is currently not possible in the standard product. We may be able to do some limited customisations to meet your requirements. This will be at an additional cost as it deviates from our standard integration product.

### Are there any limits to how much data can be synced?

There are no technical limits to the amount of data that can be synced. We have synced individual projects with over 50,000 files each and over 50 GB of

data per project. Our standard plan comes with some fair use limits detailed in your proposal which can be extended upon request and special pricing.

The only hard limit we have is for individual files to be less than 1GB. Typically this would be data like large laser scans (point cloud) of buildings, large drone video captures and special purpose files. We do not have any file type restrictions. We can sync and support all file types and data types.

We do not stop syncing the files just because the limit has been reached, this will only ever be done after consultation with you. You do not have to worry about the sync stopping once the limits are reached.

### **What if I need to change the SharePoint Account?**

We currently do not support that for a live sync. You will need to reset or delete the configuration and start from scratch again.

### **How quickly does the data sync? What is your sync speed?**

We sync data every 30 minutes after edits or changes in SharePoint. The time to move the files can depend on the size of the file and number of files edited. In 98% of cases, this happens within a few minutes.

We do not throttle data transfer speeds from our end, we are only limited by SharePoint or Procore limits. In most cases this is done every 5 minutes for hundreds of files at once. Initially, once the projects are connected, the first download can take from 4 to 48 hours depending on the amount of data in Procore. Once the initial sync is complete every future sync happens automatically, every five minutes, whenever a file change is detected in either system.

### **Can I rename my files in SharePoint?**

Yes, the sync will rename the second system for you.

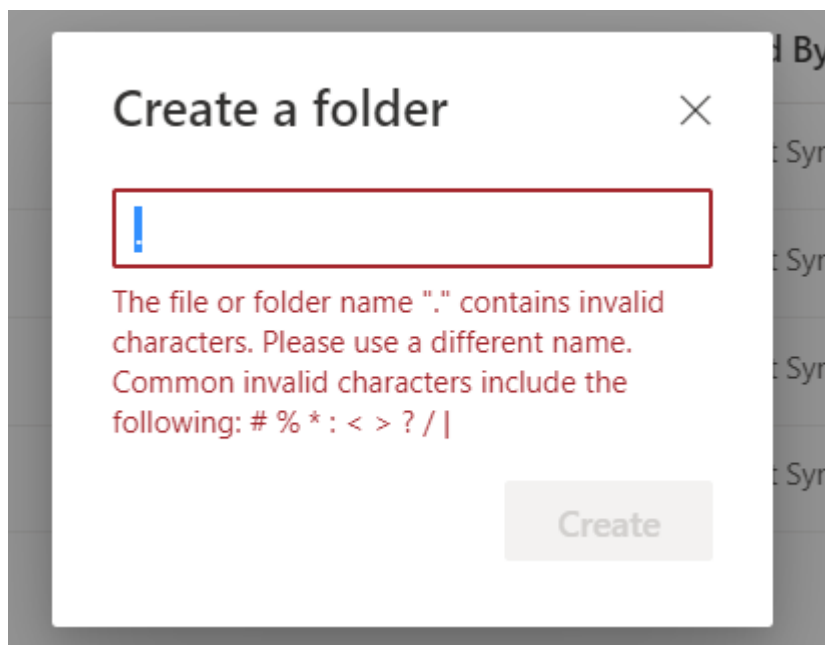
# Best practices around the integration

## Do not have any trailing spaces at the end of folders or project names

SharePoint (Windows) does not handle Document library names well with spaces at the end of the name. Procore allows **trailing spaces** at the end of Album names in their Photos tool.

Also, Sharepoint does not accept the following special characters in file names:

Hash(#),percentage(%),star(\*),colon(:),angular brackets(<>),question mark(?),slash(/), vertical pipe(|). Full stop/period (.) is permitted within the filename however full stops/periods are not permitted at the end of a file name. Please avoid naming your Procore files and folders with these characters to avoid errors in the integration.





## **Make sure your team does not change the first three levels of folders in the SharePoint Folders.**

Level one Folder Name: Procure

Level 2: The project name

Level 3: The name of the tool, for example Documents, Photos etc.

## **Do not rename the name of the top-level project name in Procure**

This will create a new top-level folder inside SharePoint. The files will need to be synced again.

## **Note: if you need to delete a large number of files**

If you need to delete a large number of files from both systems, do it manually from both systems. This is because as a safety mechanism, SyncEzy has a delete limit for the maximum number of files that can be deleted through the sync in any 24-hour period.

Once the limit is hit, the sync will not delete any more files and the sync will email the administrator with the path of the files not deleted.

## **Can I buy additional space? I'm getting an out of space error?**

Yes this will be based on your SharePoint account. Please contact your organization's SharePoint account admin for details. We do not have space restrictions for the integration.

## **Some of my folders look different or have not been synced?**

This can occasionally happen when the delete limit has been reached, due to somebody manually deleting a large number of files or a top level folder from one of the systems, and the corresponding data isn't deleted from the second system. In these cases, reach out to support and we will assist you.

# Pricing / Accounts / SyncEzy-related questions

## How does your pricing work?

Please contact us for pricing. Pricing is based on the number of Projects and amount of data synced.

## Does SyncEzy keep a copy of my data stored?

Your data is only stored on your Procore account and in your SharePoint account. SyncEzy is only the conduit and does not store any of your organisation's project data files. We only store relevant metadata (file names, folder names and folder paths, sync time, modified time etc) as required for us to manage the integration and syncing the files.

Your files are transferred through our servers for only as long as it takes to pass them from one system to the other. Once the transfer is complete the actual files are automatically deleted. We only store the metadata and the file paths.

This is why if you have any technical issues our support team may ask you to add support@syncezy.com to the project documents folder so we can review the data. We do not have access to any of your tools or login to your Procore.

## Where is SyncEzy hosted?

Our application and the metadata that we store is hosted securely with Amazon Web Services (AWS). This is the same back end infrastructure system that Procore uses.

## Do the files transferred into cloud storage count towards my cloud storage account storage limits?

Yes, all files & folders synced across will count towards your file storage limits.

## **How long does it take to transfer my files across?**

The integration syncs every 30 minutes as long as the SharePoint file or folder has been edited and saved.

## **What triggers the files being transferred?**

Any changes made to the files or folders will trigger a sync. For example, renaming the file, opening the Word document and saving it, revising it in Procore, editing a document in SharePoint, deleting the document in either system. All of these changes will trigger the sync, and the older file in either system will be replaced with the current / latest version of the file.

## **Where do I go to check the settings and billing details on my cloud storage integration?**

You can view your settings configurations and any billing details by going to the SyncEzy Portal [here](#). In the Portal, navigate to Plan Details to see billing details. Contact support to make changes or cancel your service.

## **Is there a limit on how many files can be synced in an hour?**

There are no limits from our side. On the Procore end, there is a hard limit of 3600 API calls per hour. On average, every single file takes about 4 API calls. Based on this, and depending on the speed of the data connection, we have a hard limit of 900 files that can be synced in one hour.

Most of the time we are only running an incremental sync of what has been changed in the last five minutes, which is far fewer files than 900. So on a day-to-day basis you should see all of your interactions sync automatically every five minutes.

## **What tools can be integrated from Procore to SharePoint?**

Currently we can sync Procore Project Documents, Photos & Daily Log / Site Diary. We also plan to add additional modules to the sync like Drawings, Models, RFI and more. If you have any specific requirements regarding data extraction or having to sync specific tools from Procore, please reach out to our support team and we will do our best to help.

## Other questions

### Have a support question?

We offer three support channels:

**Chat** - Live Chat (AEST Business hours) from within your [integration portal](#).

**Phone** - Phone: # 1 for Support

AUS: +61 2 9136 9448

NZ: +64 9 303 2999

UK: +44 203 670 1109

US: +1 720 500 9302

**Email** - Email support: [support@syncezy.com](mailto:support@syncezy.com)

### Have you done this before and what about security of data?

Yes we have, we have been building integrations for the last eight years with over 50 integrations built across various systems. All our communication between systems is fully-encrypted. We do not store your actual data and files on our servers, we only store the IDs / names / and meta data of the records and some minimum information for logging and troubleshooting.

### What if I need to use a different cloud storage system other than SharePoint?

Reach out to us at [support@syncezy.com](mailto:support@syncezy.com). We are always looking to build more integrations. Chances are that we already have something in our plans.

### What if I use a different project management system?

We have worked with a variety of job and project management systems in the past, including Aconnex, simPRO, ServiceM8, Aroflo and more. If you would like the data to go into a different job management system reach out to us and we'll do the best to help.

## **What if I use a different cloud storage system?**

We have worked with a variety of cloud storage systems in building integrations including Sharepoint, Google Drive, OneDrive, Dropbox, SharePoint Business and more. If you would like a different system integrated with Procore, reach out to us and we'll do the best to help.