Tips and Best Practices for Using Procore with odrive

Contents

Notable features

Set auto empty trash

By default, odrive has a "trash" feature that provides a layer of protection against inadvertent deletes. Local deletes are detected by odrive and not sent to the cloud storage until the "trash" is emptied.

Procore storage has its own "cloud trash" that also protects against inadvertent deletes. Additionally, Procore never permanently deletes anything. With this in mind, it is recommended that a rule is set to automatically empty the odrive trash.
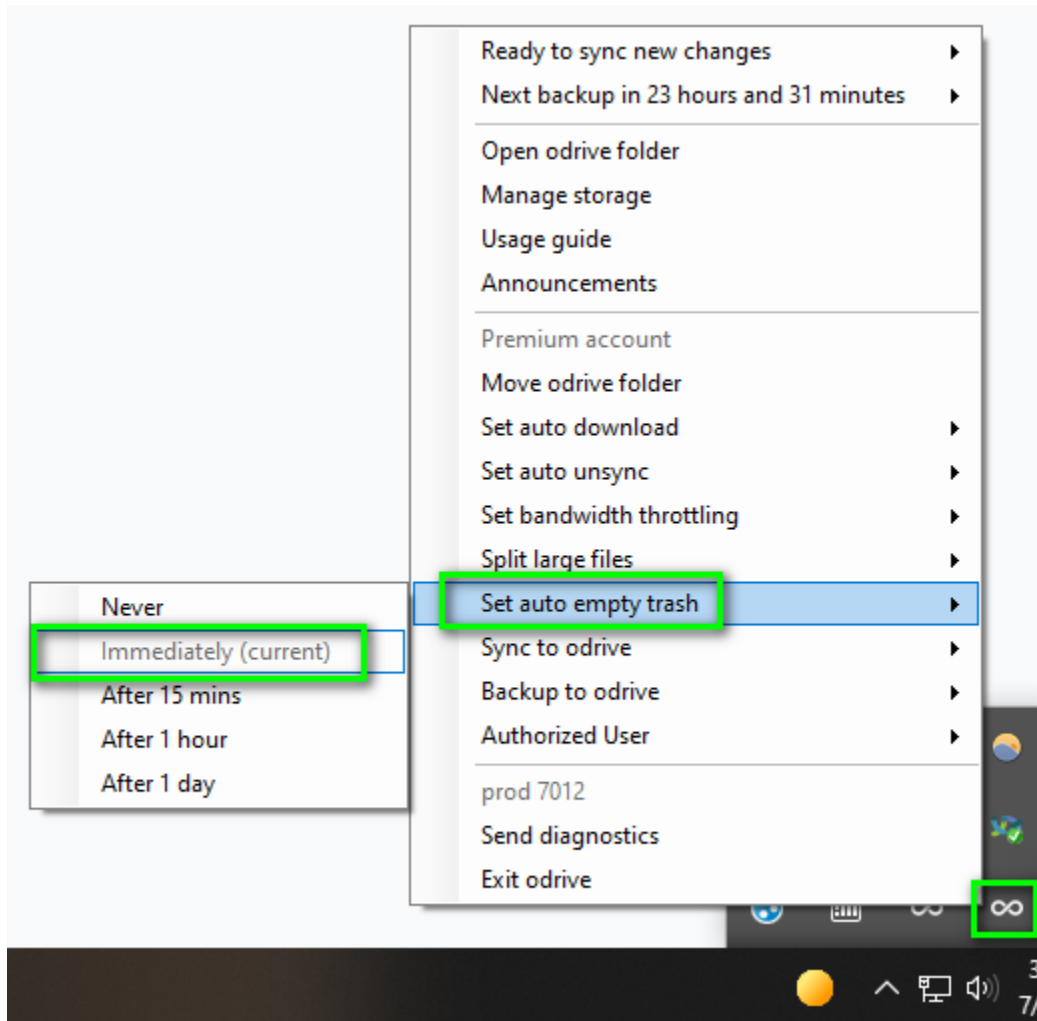

Auto empty trash is a Premium feature. If you are using the free version, just make sure to periodically empty the trash from the odrive tray menu to ensure that queued deletes are sent on Procore storage.

More about the odrive trash here: https://docs.odrive.com/docs/sync-changes#empty-trash

Unsync

Manual: You can manually unsync any files or folders to turn those items back into placeholder files and free up the local disk space.
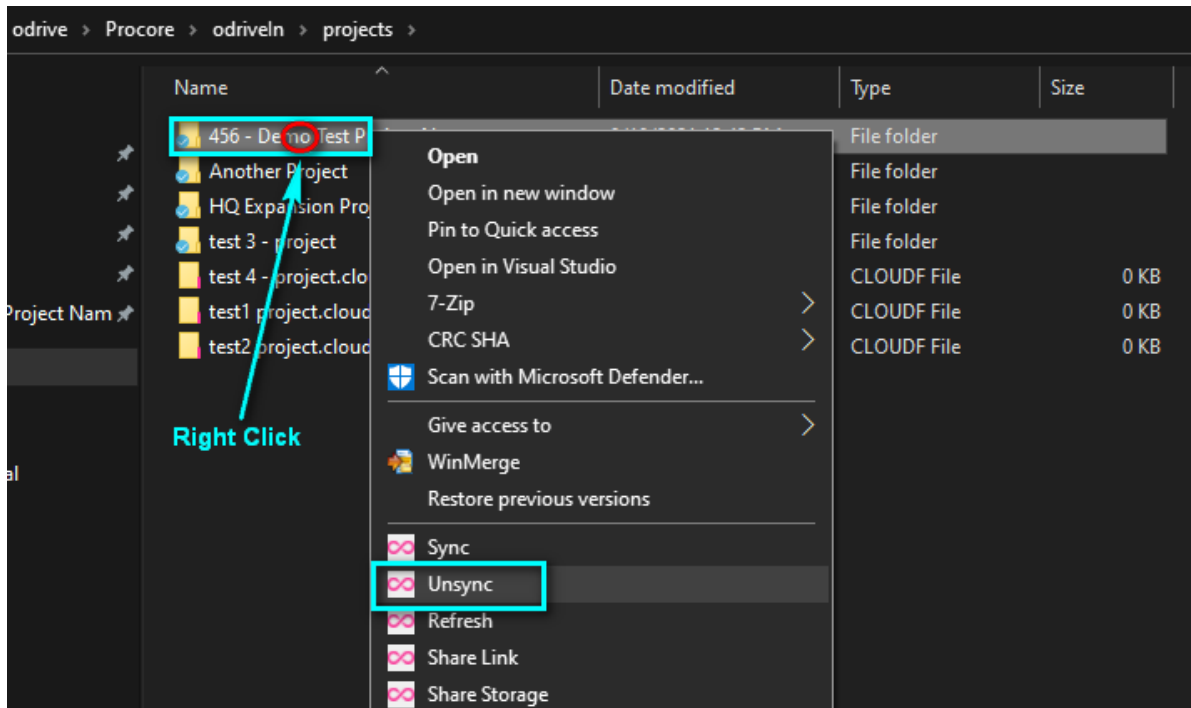
Automatic (Set auto unsync): odrive can automatically unsync files based on simple rules that can be set in the odrive tray menu. With an auto unsync rule enabled, odrive will routinely look at the synced files in the Procore folder and unsync any files that have not been modified within the threshold period set.
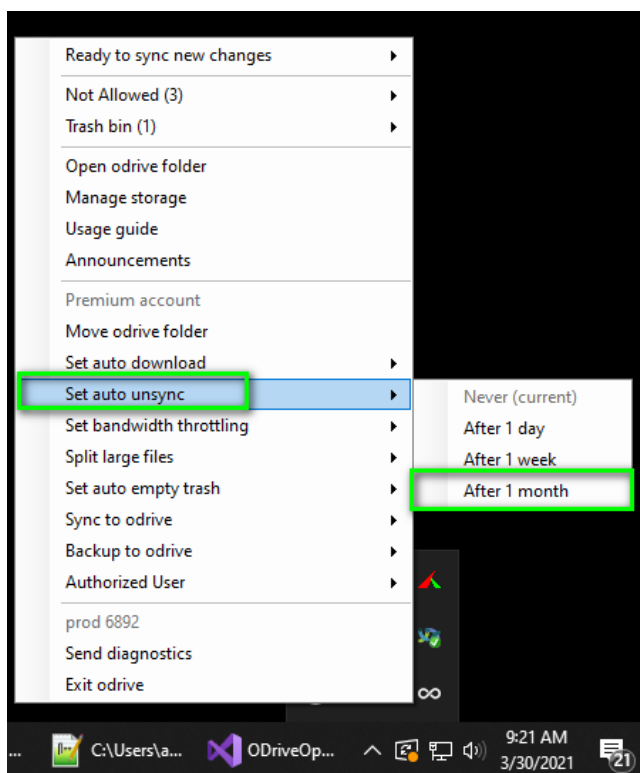

Unsync is a Premium feature

More about unsync here: https://docs.odrive.com/docs/manage-disk-space#unsync-old-files

Sync all items in a folder

There are times when you may want to sync all of the items in a folder. You may also want to ensure that any future items are downloaded. This is a typical use case if you are working with Procore project folders

For example:

Right-click on the desired folder and select "sync":
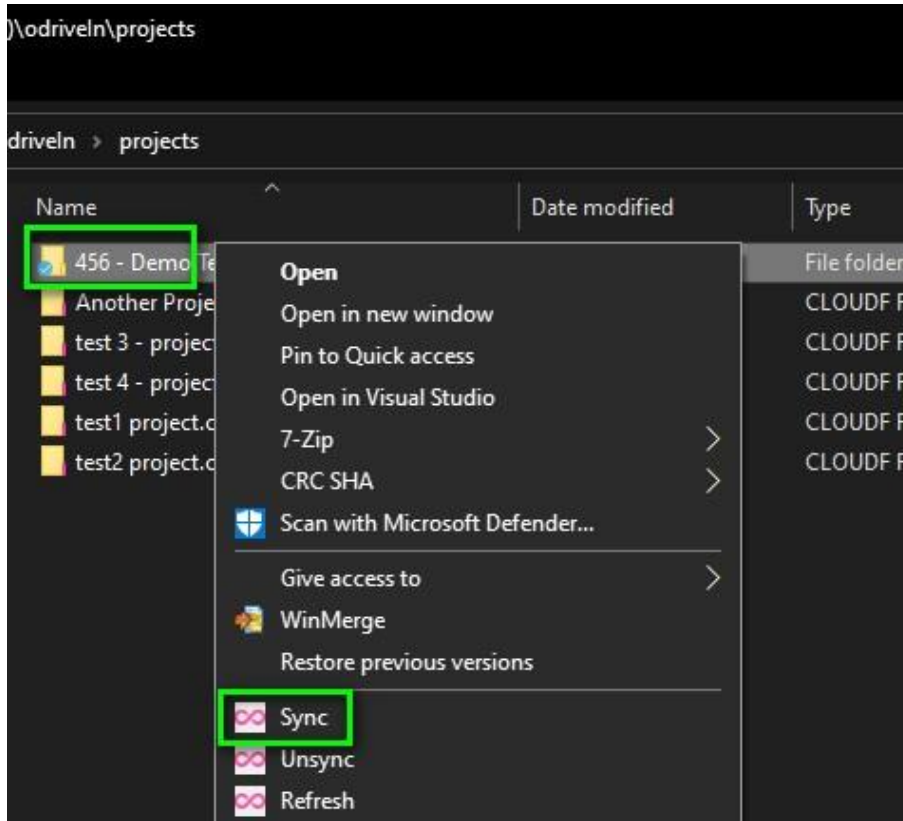
Set the following options in the sync pop-up:

- Slide the slider all the way to the right for "Everything". This ensures all existing placeholders are downloaded. You can set this threshold to anything you like. *All files underneath the set threshold size will be downloaded and all files above the set threshold will remain placeholders*.
- Check the "Include Subfolders" checkbox
- Check the "Save and apply to new files and folders under this folder" checkbox **
- Click the big silver sync button

** The "Save and apply to new files and folders under this folder" option is a Premium feature. It is not required, but can be very convenient to use. This option creates a "folder sync rule". A "folder sync rule" will apply these same settings to any new content that is detected on the remote side. For example, if a new folder shows up in this structure on the remote storage, it will be expanded, and the files inside will be downloaded based on the threshold. In this example the new files would be automatically downloaded because we set the threshold to "Everything".

Important Note:
You can perform this recursive sync action on any folder in odrive, but is not recommended that you perform it on top-level folders like:
/Procore
/Procore/[company name]
/Procore/[company name/projects

Doing so will potentially download thousands of files/folders and gigabytes of storage that you likely do not need. Instead, it is recommended that the highest level you do this is at the project folder, as in the example above.

More about recursive folder sync here: https://docs.odrive.com/docs/sync-your-odrive#sync-all-files-and-subfolders
More about "folder sync rules" here: https://docs.odrive.com/docs/sync-source-changes#folder-sync-rules

Placeholder files/folders within apps (Bluebeam Revu, Word, Outlook, etc..)

Since odrive uses placeholder files to represent files and folders in the cloud, until you decide to sync them, this can prevent some applications from showing the folders that you have not yet chosen to sync/browse into. There are a few options for dealing with this.

Option #1

Use the right-click->sync option on a folder to pre-emptively perform a **recursive expand or recursive sync**. For example, if you want to expose the entire structure of a folder without downloading all of the files, you can right-click on the folder, select "sync".
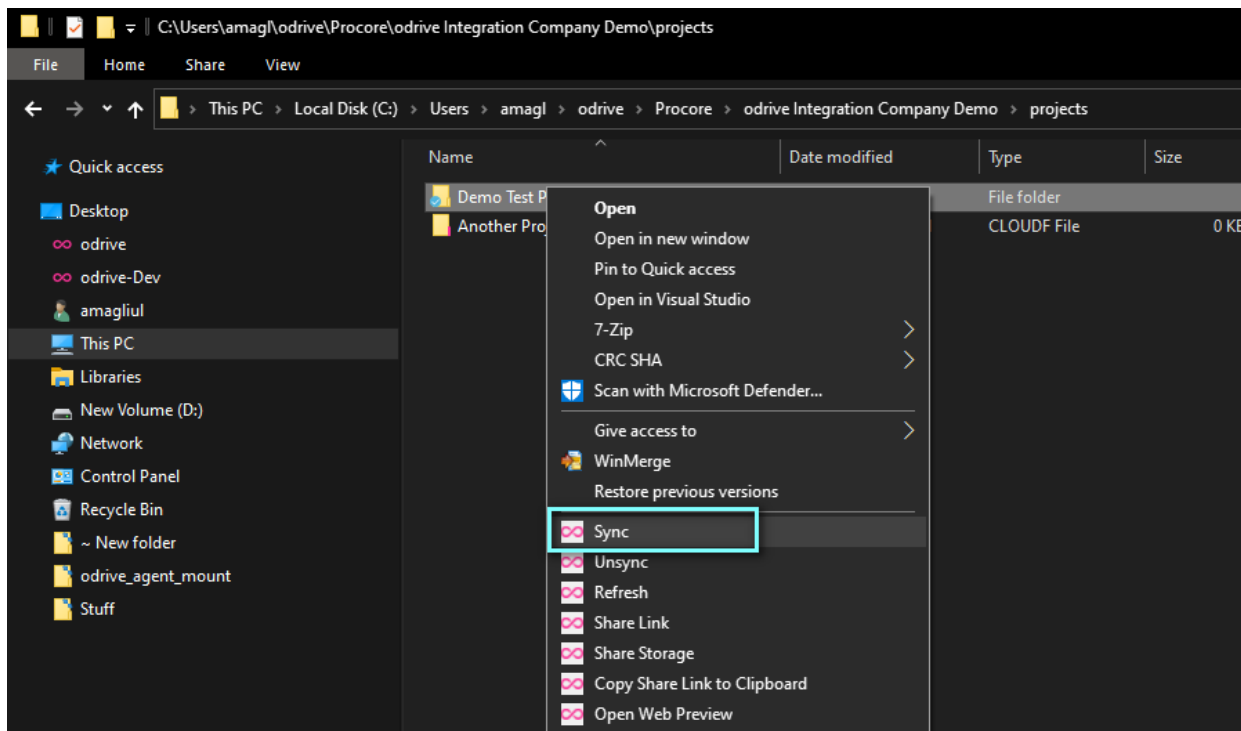
Then set the following options in the sync pop-up:

- Slide the slider all the way to the left for "Nothing". This will make sure you leave all files as placeholders. You can set this threshold to anything you like. *All files underneath the set threshold size will be downloaded*.
- Check the "Include Subfolders" checkbox
- Click the big silver sync button

This will go through the structure selected and expand all folders, turning them into "real" folders, but leaving the files as placeholders.

The above is helpful for saving new files from the editing application into folders, but there may also be cases where you are wanting to open files from within an editing application and that application is filtered for only certain file types.
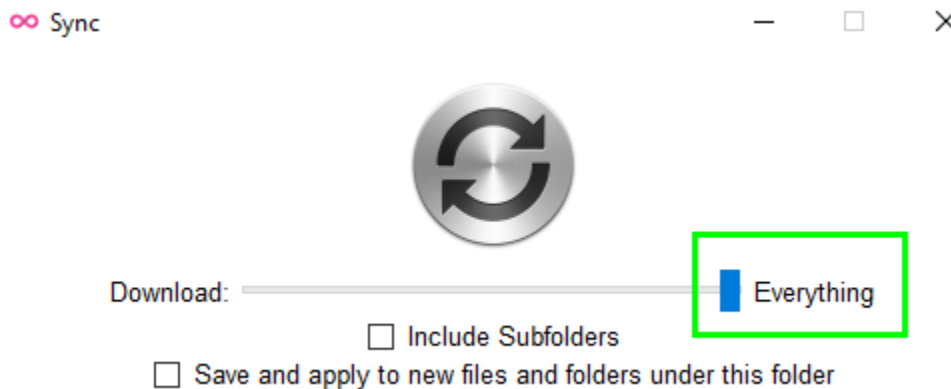
In this case you would do the following preemptively download the files you want to have access to locally.
You can:

1. Do this on a file-by file basis (right-click on a file or files and select "Sync")
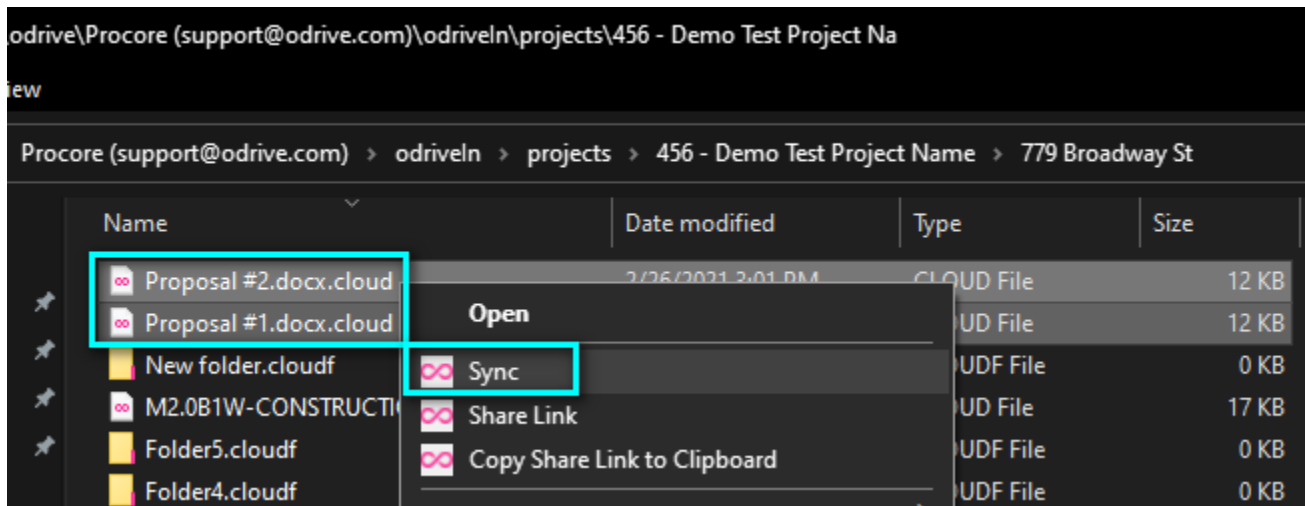

2. Download all of the files in a folder.

3. Download all of the files in a folder structure (recursive download).

Option #2

Another option is to adjust the filtered view that the application is presenting to show placeholder files.
In many applications you can change the "File Name" field value to * to display all of the items in that folder (*you may need to hit enter/return on your keyboard for the change in the view to take effect*).

In some applications there may also be an option to "display all file types" in the window.
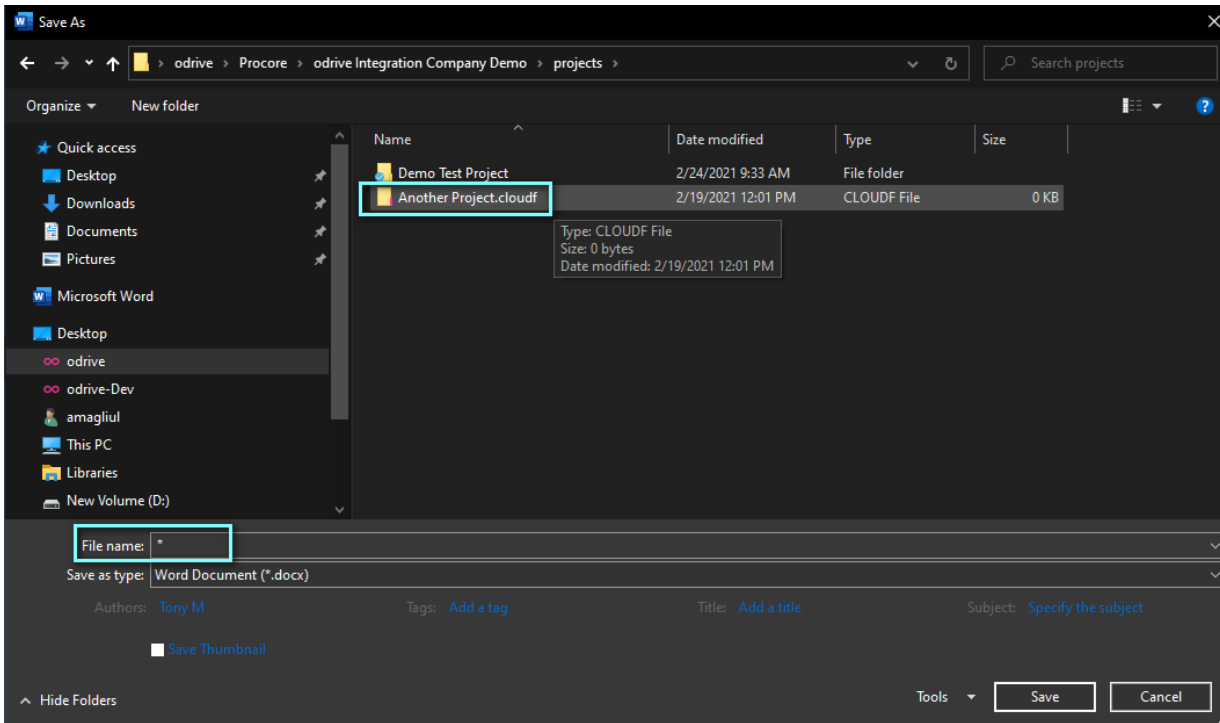
*You can also use *cloud* to show placeholder files and folders, specifically.*

You can then right-click->sync the visible placeholder to sync that file or expand that folder and browse into it, as the next screen shows.
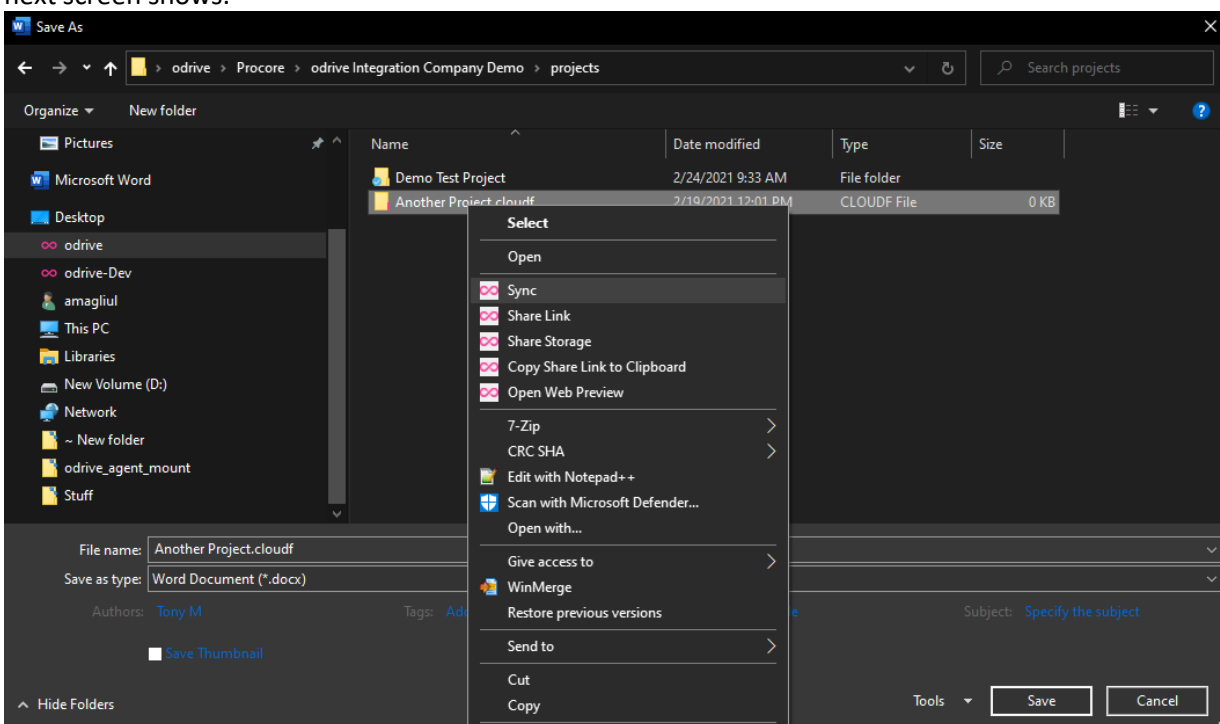
Single folder expand, after right-clicking on a folder and selecting "Sync":

- Slide the slider all the way to the left for "Nothing". This will make sure you leave all files as placeholders.
- Leave the "Include Subfolders" unchecked, to only expand the root of the selected folder.
- Leave the Save and apply to new files and folders under this folder unchecked.
- Click the big silver sync button

Option #3

An additional option is to perform a recursive sync directly from the "save as" window by clicking on "empty space" to take the action on the current folder.
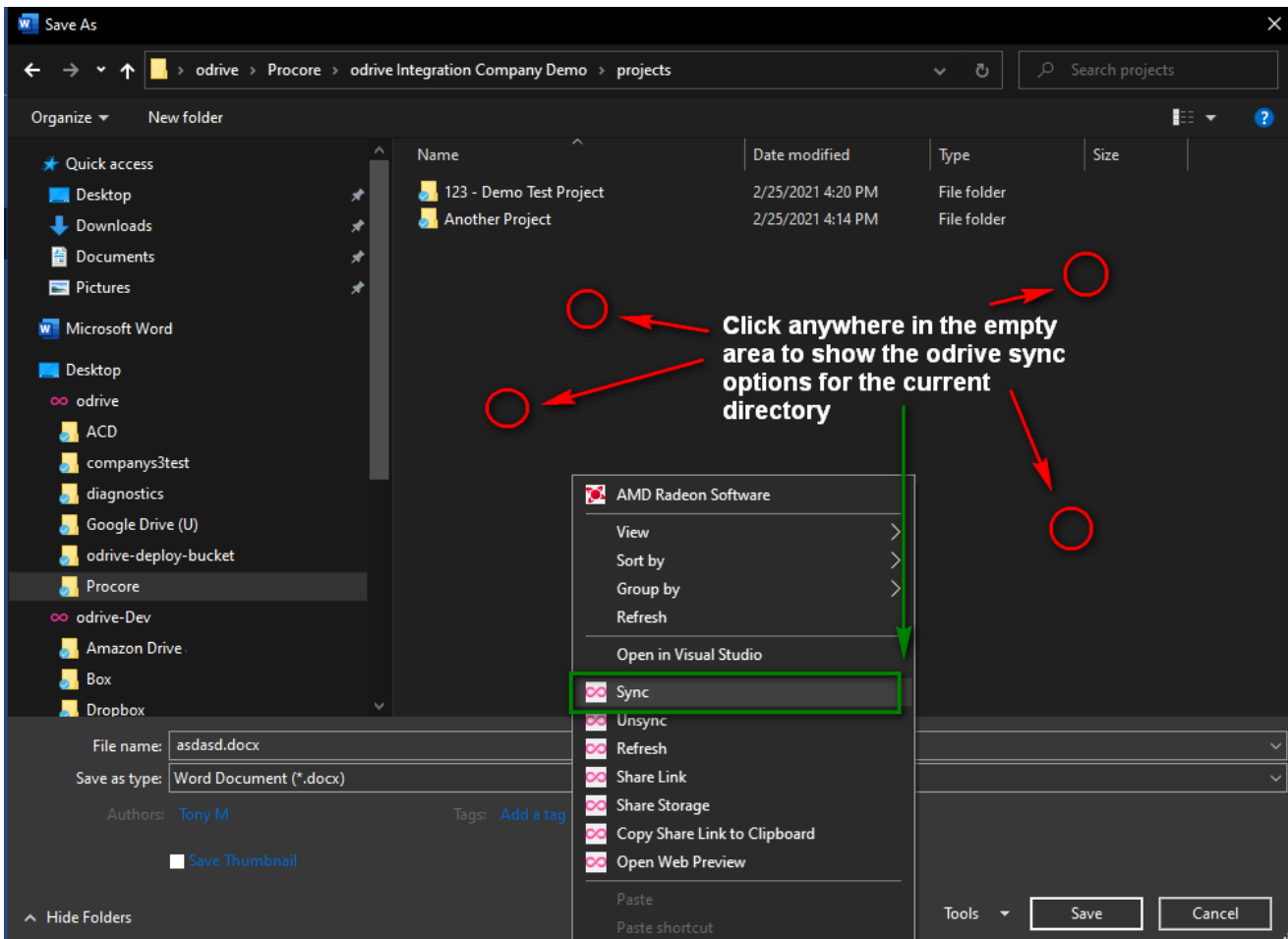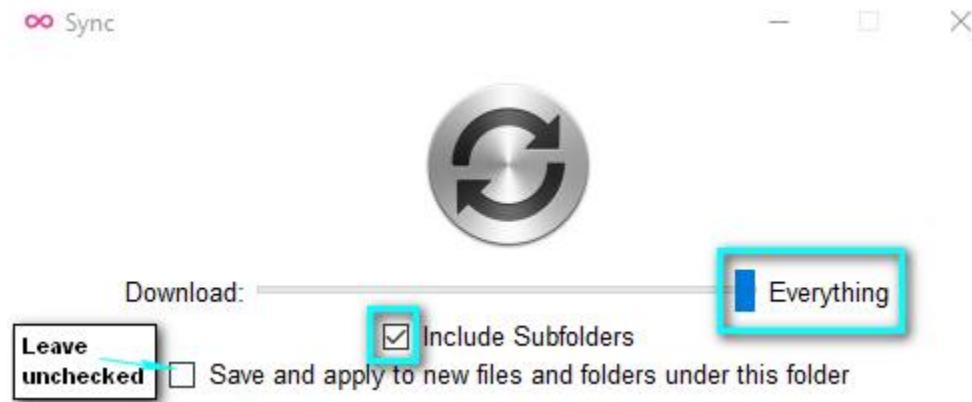
One-time recursive folder expand:
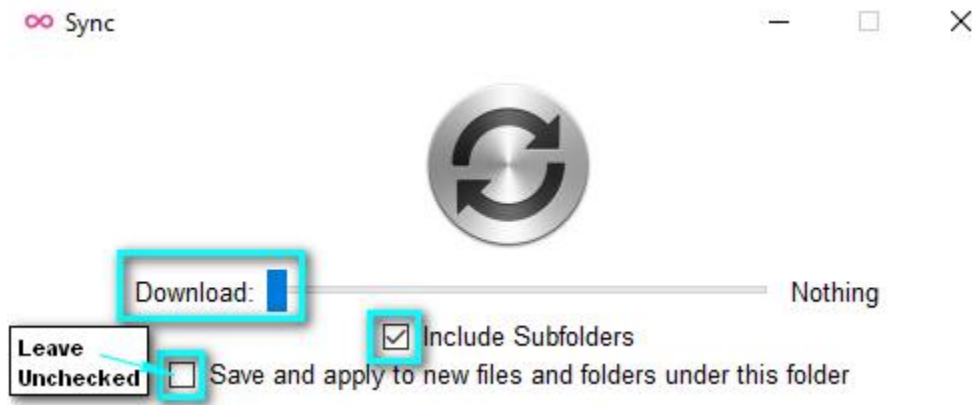
- Slide the slider all the way to the left for "Nothing".
- Check the "Include Subfolders" checkbox
- Click the big silver sync button

One-time recursive full sync (expand and download):

- Slide the slider all the way to the right for "Everything".
- Check the "Include Subfolders" checkbox
- Click the big silver sync button

Dealing with long paths

odrive is fully compatible with long paths, but some applications (including Windows, itself!) can encounter issues with file paths that exceed a certain number of characters (typically 260).

To help combat path-related issues, you can use make use of the Premium "sync to odrive" feature to "short-cut" the path to any folder, including your projects folder, specific project folders, folders within projects, etc...

Example #1

Here is an example of how to do that for the Procore "projects" folder.

1. Create a new local folder C:\projects
2. Right-click on this new 'projects' folder and select "Sync to odrive"
3. In the browser that pops-up, select the Procore/[Procore company name here]/projects folder and click Okay.
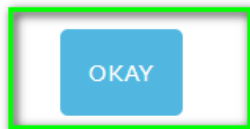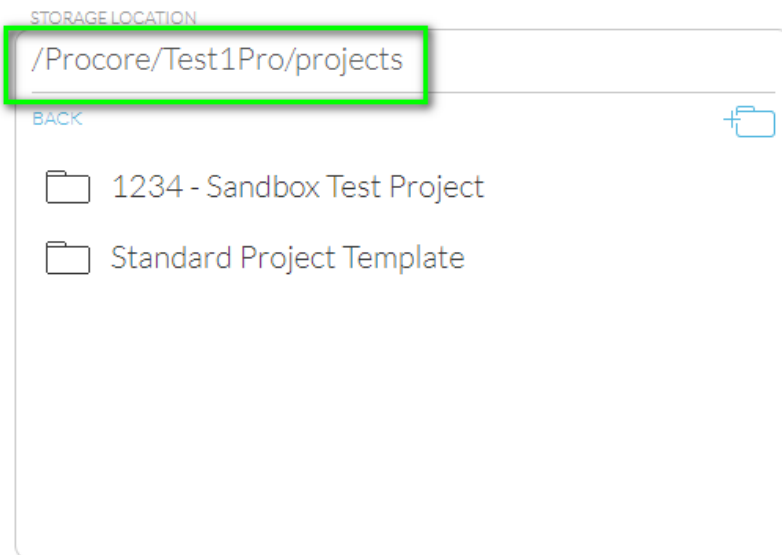
   Important note: Make sure the local folder name and the target remote folder name match
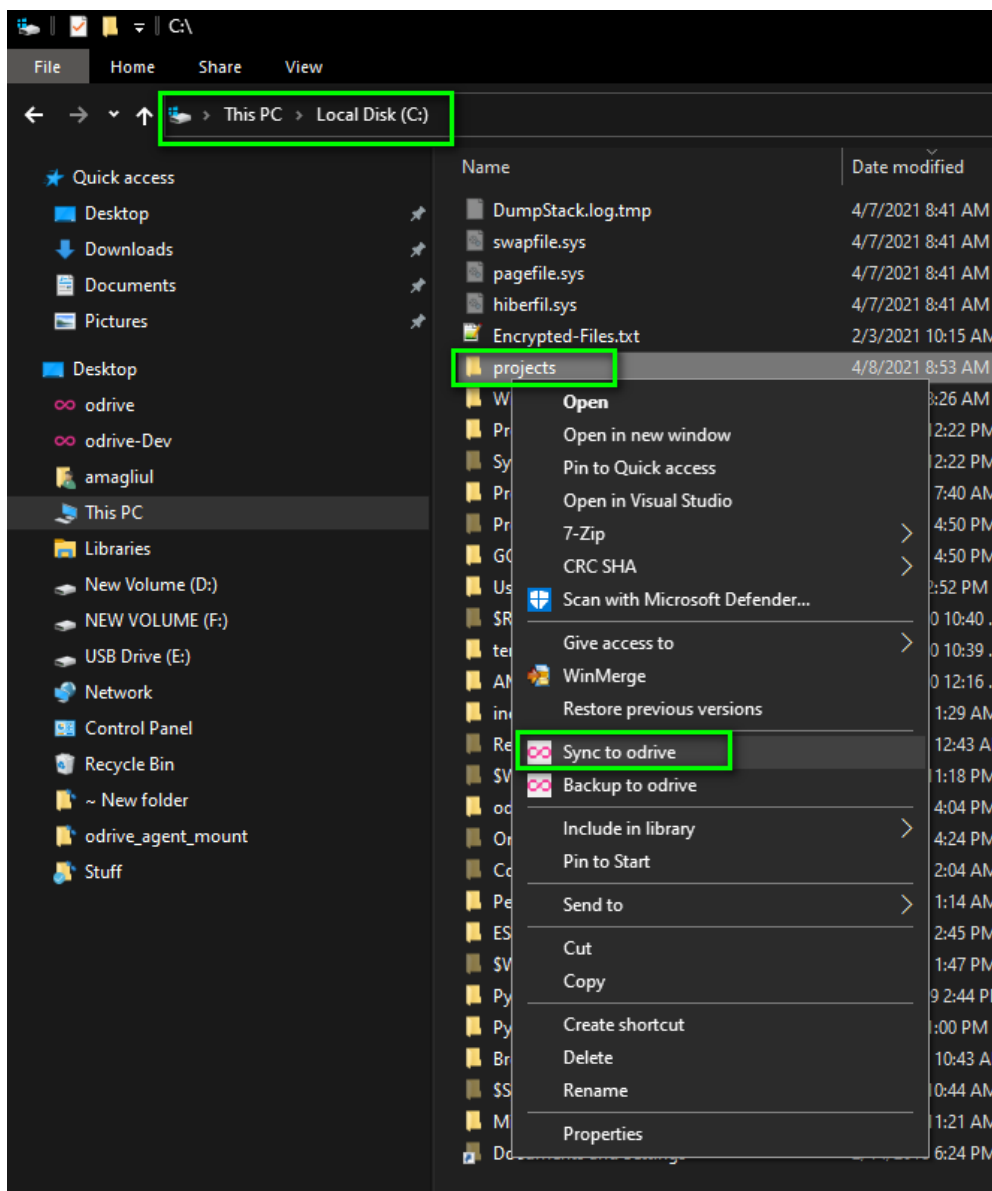
Pick Destination Folder

A new folder will be created with the same name as the folder on your computer (unless one already exists or if the destination folder itself has the same name). Learn more
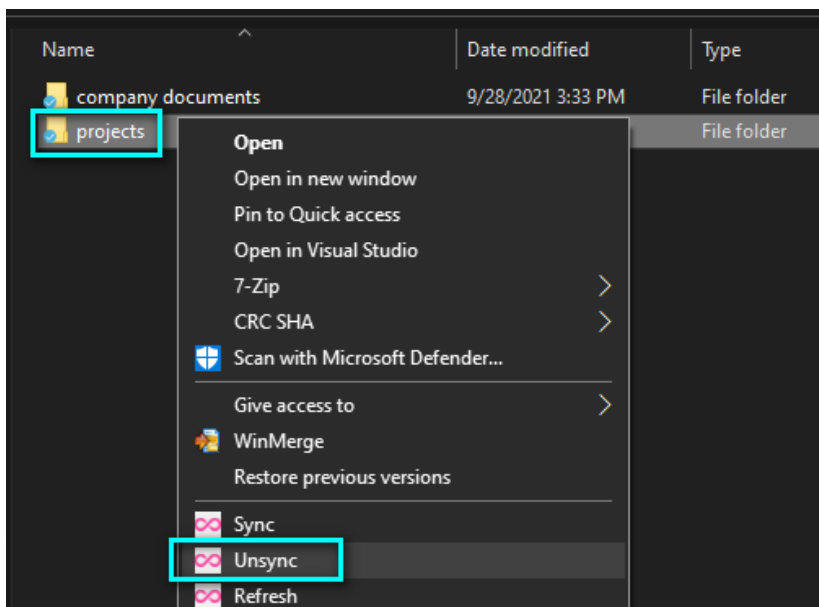
STORAGE LOCATION

/Procore/Test1Pro/projects

BACK

📁 1234 - Sandbox Test Project

📁 Standard Project Template

OKAY

cancel

This will create a new odrive sync folder at C:\projects and maps to the remote /Procore/projects folder. This will cut out a significant amount of characters from the paths (removes Users\[user name]\odrive\Procore\[company name])

Once this has been done, all project access can be facilitated from the new folder. You can use the odrive "unsync" feature to unsync the original, default location of the "projects" folder, freeing that space and collapsing the structure.

Name	Date modified	Type
📁 company documents	9/28/2021 3:33 PM	File folder
📁 projects		File folder

Open
Open in new window
Pin to Quick access
Open in Visual Studio
7-Zip   >
CRC SHA   >
🛡 Scan with Microsoft Defender...

Give access to   >
WinMerge
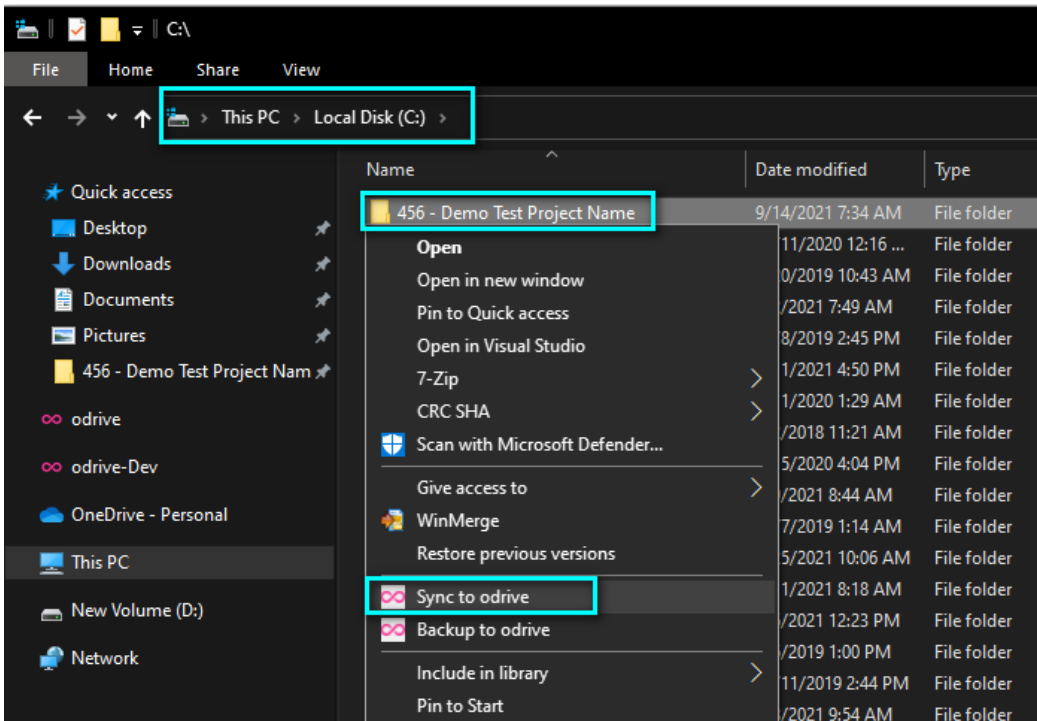Restore previous versions

♾ Sync
♾ **Unsync**
♾ Refresh

This same thing can be done at any level of the odrive path. See Example #2, below, for another example of this.
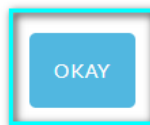
Example #2

Here is another example targeting a specific project folder, "456 - Demo Test Project Name":

1. A new, empty folder is created in C:\ named "456 - Demo Test Project Name" to match the project name.
2. Right-click is done on the new folder and "Sync to odrive" is selected.
3. On Procore, "/Procore/odriveIn/projects/456 - Demo Test Project Name" is selected as the destination folder.
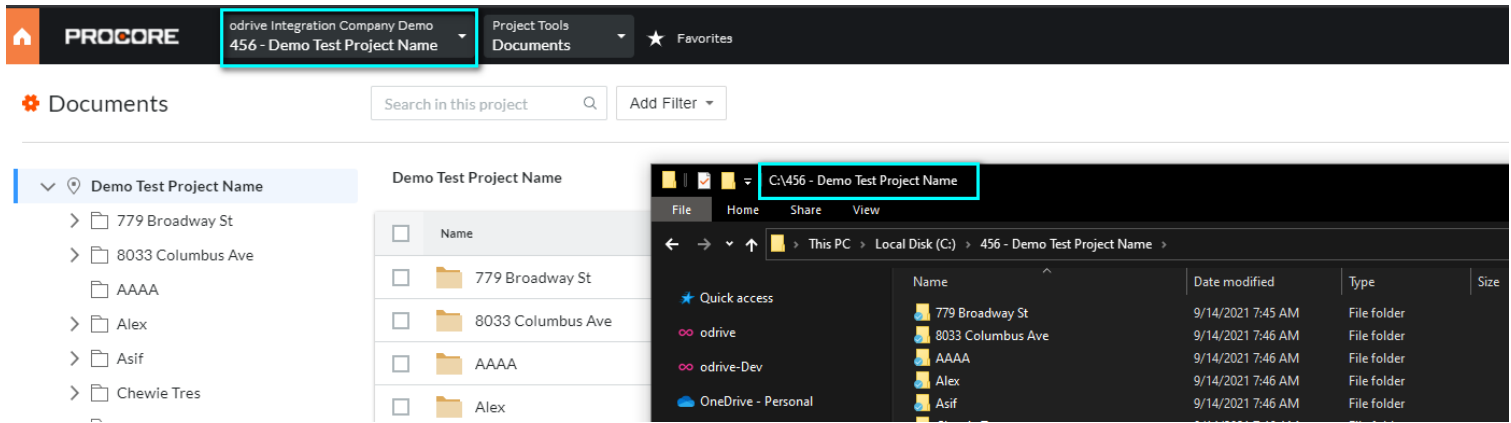

That's it!

This will create a sync relationship between "C:\456 - Demo Test Project Name" and the Procore project "456 - Demo Test Project Name". Once the new "sync to odrive" folder relationship initializes, we will be now able to interact with all of the projects files from this new location.

More about "sync to odrive": https://docs.odrive.com/docs/manage-sync#sync-any-folder-sync-to-odrive
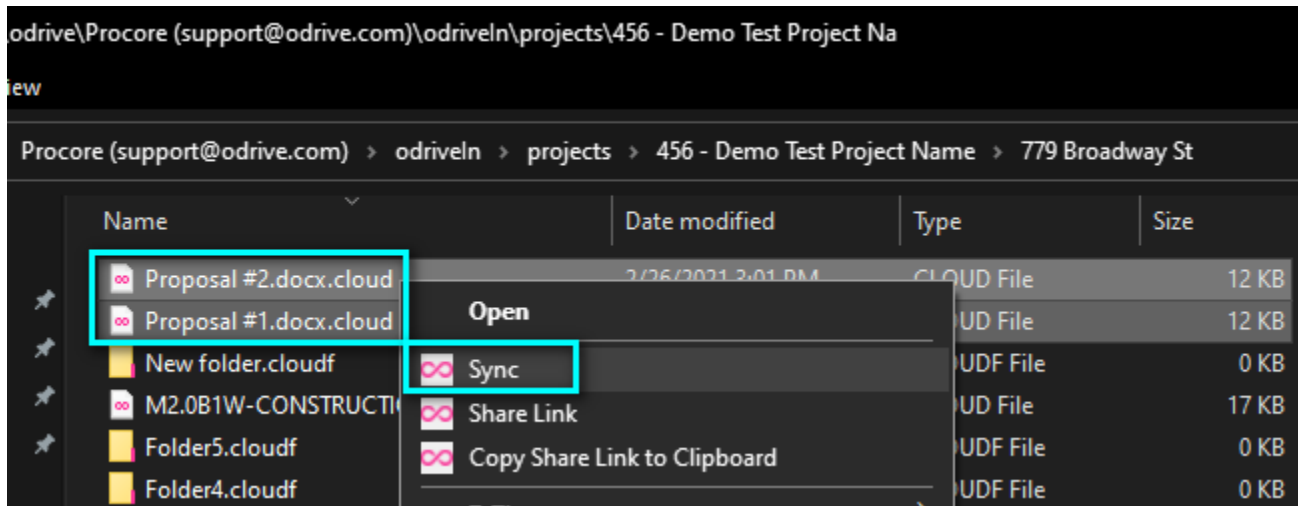
Copying and Moving Files and Folders

Copying

The most important thing to keep in mind when copying Procore data is that **placeholder items cannot be copied**.

For any items that you want to copy, you must first make sure they have been synced down to the local system.
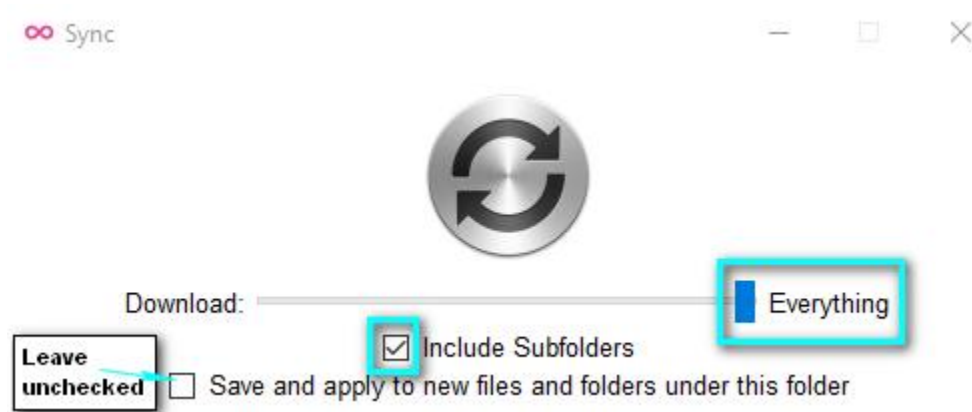
For files:
- Right-click on a file or multi-select and right-click on several files and select "sync"

For folders:
- Right-click on the folder and select "sync" *(You cannot multi-select folders folder sync)*
- Slide the slider all the way to the right for "Everything".
- Check the "Include Subfolders" checkbox
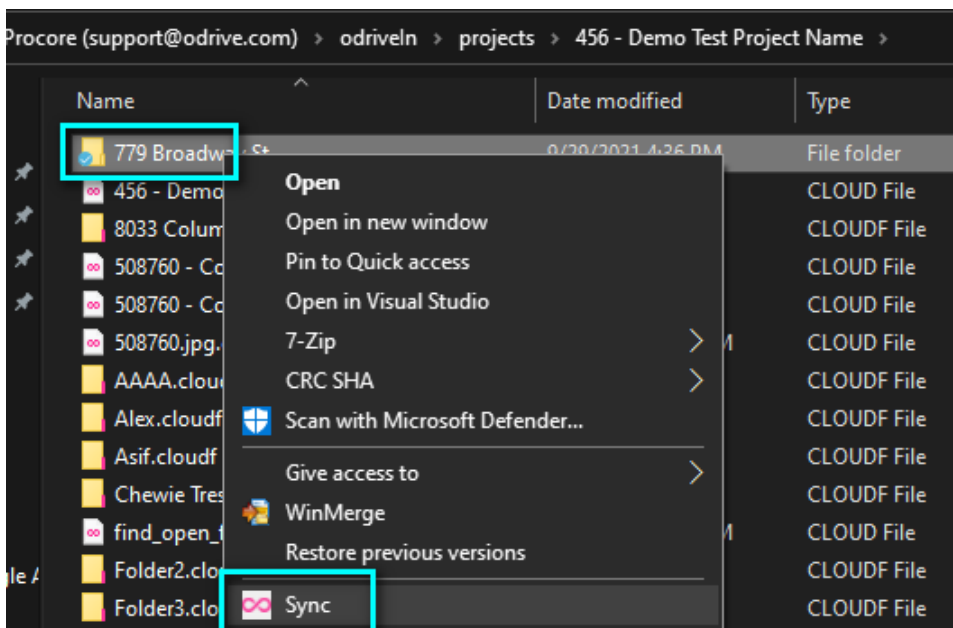- Click the big silver sync button

Moving

Placeholder files can be moved and renamed, but there are some boundaries that cannot be crossed:

- You **can** move items within the same project
- You **can** rename items in a project
- You **can** move items inside company documents
- You **can** rename items inside company documents
- You **cannot** move items between projects
- You **cannot** move items between company documents and project folders
- You **cannot** move or rename items inside the root of the Procore folder (/Procore/)
- You **cannot** move or rename items inside the root of the company folder (/Procore/[Company Name]/)
- You **cannot** move or rename items inside the root of the projects folder (/Procore/[Company Name]/projects)

Moving items across projects is similar to copying. Procore does not have a way to facilitate a move of files and folders across projects, natively. This means, just like copy, we need to download the selected items before moving them.

In this example I am making sure to sync everything in the "779 Broadway St" folder inside the "456 – Demo Test Project Name" project, so that I can move "779 Broadway St" to a new project.