

# Introduction to Procorem

Partner Training | October 2020



*Helping You Solve the Affordable Housing Problem*



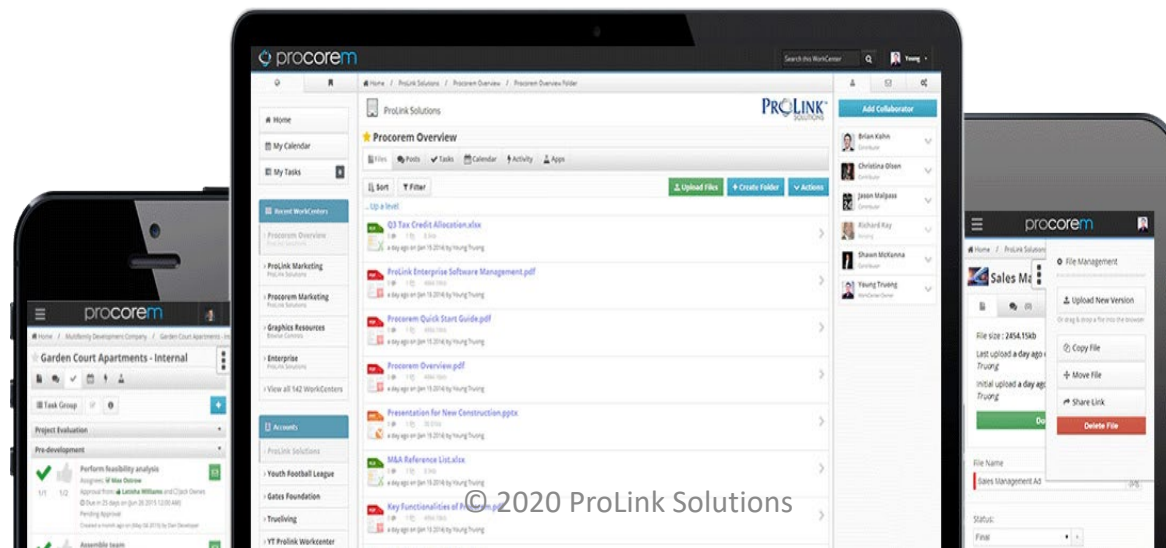
# Agenda

- **Introduction to Procorem**

# Procorem Overview - Introduction

Procorem is a **secure software portal** that allows you to **collaborate** with WHEDA and others in your projects in a secure environment.

Manage your projects with features like document management, task setup, assignments, and approvals. And it's mobile and compatible with your tablets and phones.

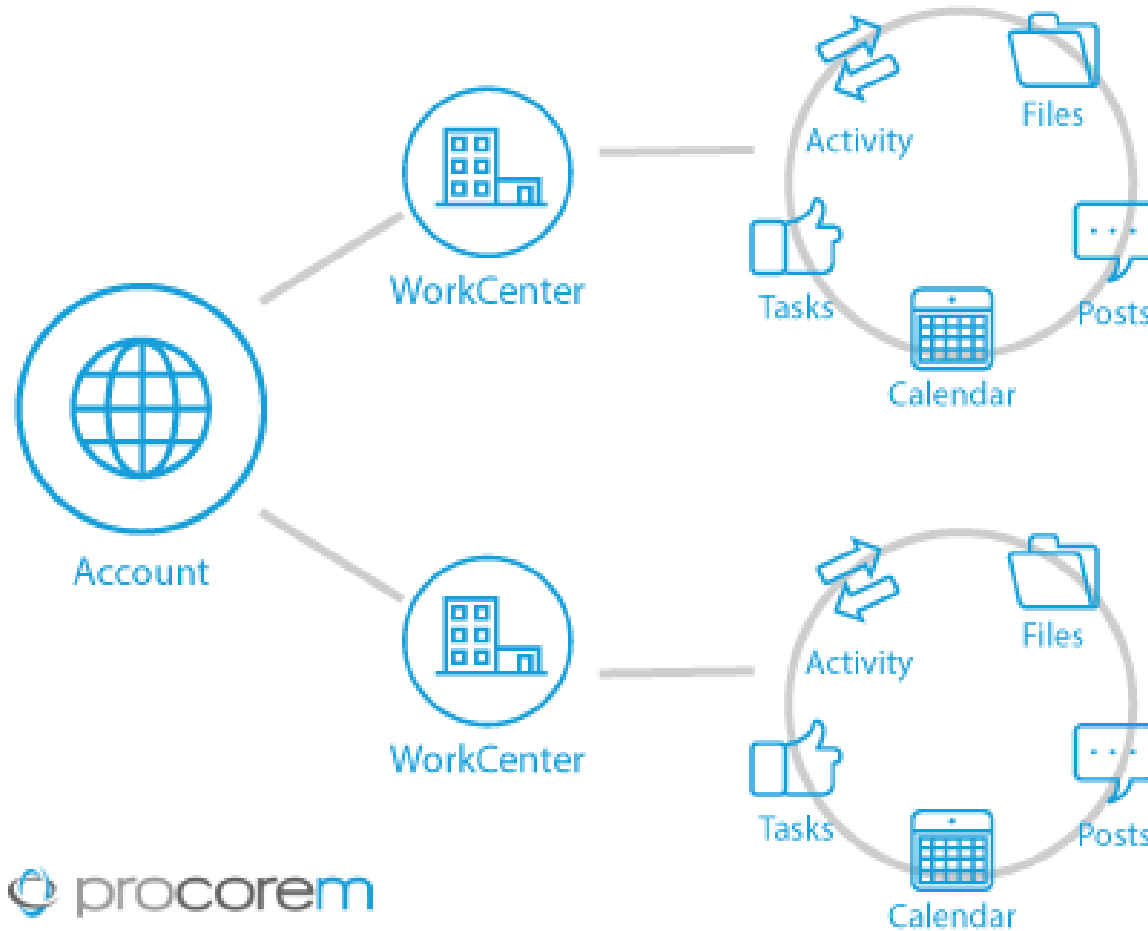


# Procorem Overview - Introduction

WHEDA is moving to the use of Procorem for the following benefits:

- Less onsite time
- Less intrusive on tenants and developer/owner/agent
- Easier retrieval of demographic data
- Historical record of all transactions
- Record of notifications (both ways)
- Record of data input (both ways)
- Support of application process for all funding
- Long term cost savings for all
- Environmentally friendly

# Procorem Overview - Hierarchy



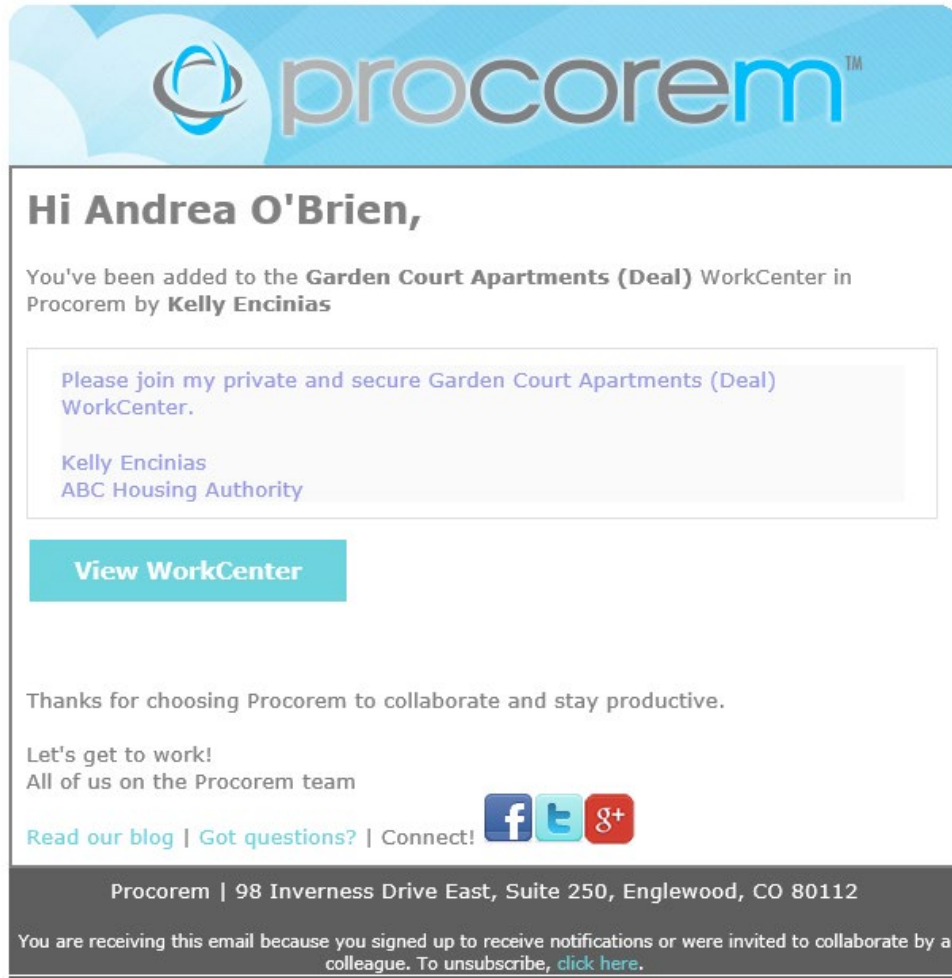
You will be “invited” to a WorkCenter and will have access to view and update the many items available within the WorkCenter

# Agenda

- **WorkCenter Invitations**
- Accessing and navigating your WorkCenters

# WorkCenter Invitations

You will receive a WorkCenter invite from Procorem for your project



Simply click the link in the invitation, create a login, and join the WorkCenter.

# WorkCenter Invitations

If it's your first time accessing Procorem, you will need to sign up

You've been invited to join Procorem!  
Easily collaborate with friends, family, co-workers, and clients

Welcome, Rental Housing!

Alena Henderson would like you to join their private and secure account, Virginia Housing.

As a guest, your access is completely free. Simply fill out the form below to begin working together!

First Name: Rental  
Last Name: Housing  
Email: TestVHDArental@gmail.  
Password: .....

- ✔ Cannot contain spaces.
- ✔ Contains at least 1 number.
- ✔ Contains at least 1 capital letter.
- ✔ Contains at least 1 lowercase letter.
- ✔ Must be at least 8 characters long.

I agree to the [terms and conditions](#).

Sign Up Now

You will see a record with your name and your email address.

- You must set your own password.
- As you enter a password, Procorem will indicate if you met all of the password rules.
- All the rules must be green
- The “I agree to terms” must be checked
- Click SIGN UP NOW



# Agenda

- WorkCenter Invitations
- **Accessing and navigating your WorkCenters**

# Accessing and navigating your WorkCenters

After logging in you will arrive at your My Activity Feed home screen

The screenshot shows the Procorem user interface. At the top, there is a navigation bar with the Procorem logo, a search bar, and a user profile dropdown for 'Autumn'. Below this is a left-hand navigation menu with options: Home, My Activity Feed (selected), My Calendar, My Tasks (8), My Accounts (2), My Favorites (0), Recent, ProLink Solutions, ABC Housing Authority, Garden Court Apartments (Deal), and View All 1 WorkCenters. A 'Go to Account' button is located at the bottom of the menu. The main content area is titled 'My Activity Feed' and features a large blue banner with the text: 'Welcome to Procorem. Procorem is a growing ecosystem of individuals and organizations that are collaborating efficiently in real-time. Now you're a part of it, and we want to help you get started. Check out the links below. Getting around Procorem, The Procorem Hierarchy, Procorem Quick Guide'. Below the banner, there are tabs for 'Activity Feed' and 'Pending Items (0)'. The activity feed shows two entries: 'Kelly Encinias added a new collaborator 2 minutes ago on (Sep 29 2020)' for 'Garden Court Apartments (Deal)', where 'Sandy Smith was added to the Garden Court Apartments (Deal) WorkCenter', and 'Kelly Encinias left a WorkCenter 7 minutes ago on (Sep 29 2020)'. On the right side, there are buttons for 'Create Account' and 'Create WorkCenter', and a 'Welcome to Procorem!' message with links to the 'Procorem Help Center' and 'Meet Procorem' article. A video player for 'Getting Around Procorem' is also visible.

- Access your WorkCenters in the left navigation menu
- Update your Profile by clicking on your name at the upper right

# Accessing and navigating your WorkCenters

Within each WorkCenter all users that have access are listed at the right

The screenshot displays the Procore WorkCenter interface for 'Garden Court Apartments (Deal)'. The top navigation bar includes the Procore logo, a search bar, and the user's name 'Kelly'. The main content area is titled 'Files' and shows a list of folders: 'Applications & Underwriting', 'Compliance', 'Construction Inspections', 'Draw Requests', 'Due Diligence', 'File Reviews', and 'Financial Data'. Each folder entry includes a folder icon, a count of items, and the creator's name and date. On the right side, there is a 'Collaborator' panel with the heading 'Add Collaborator'. This panel lists several users with their profile pictures, names, and roles, each with a dropdown arrow. The collaborator list is highlighted with a red border. The users listed are: Alysse Sanders (Multifamily Lending Manager), Dan Developer (Developer), Debbie Lee (Development Officer), Harry Zulauf (Developer), Jane Lewis (Asset Manager), Jeff Holmes (Portfolio Analyst), Larry Goldstein (Executive Director), Meredith Watson (Multifamily Lending Manager), and Sandy Smith (Invite pending acceptance). The left sidebar contains navigation options: Files, Posts, Tasks, Calendar, Activity, WorkCenter Settings, Links, and Tenant Event Portal.

Please work directly with your WHEDA contact to add and remove users on your WorkCenter

# Accessing and navigating your WorkCenters

Use the left navigation menu to access all the features available in your WorkCenters

The screenshot displays the Procorem WorkCenter interface. The left navigation menu is highlighted with a red box and includes the following items: Files, Posts, Tasks, Calendar, Activity, WorkCenter Settings, and Links. The main content area shows the 'Files' section for 'Garden Court Apartments (Deal)'. The breadcrumb trail is 'Home / ABC Housing Authority / Garden Court Apartments (Deal)'. The 'Files' section lists several folders: Applications & Underwriting (6 files, 2 folders, 5 days ago), Compliance (4 files, 0 folders, 10 months ago), Construction Inspections (0 files, 0 folders, 11 months ago), Draw Requests (1 file, 0 folders, 11 months ago), Due Diligence (0 files, 5 folders, 3 months ago), and File Reviews (0 files, 0 folders, a year ago). The right sidebar features an 'Add Collaborator' section with a list of users: Alysse Sanders (Multifamily Lending Manager), Dan Developer (Developer), Debbie Lee (Development Officer), Harry Zulauf (Developer), Jane Lewis (Asset Manager), Jeff Holmes (Portfolio Analyst), Larry Goldstein (Executive Director), Meredith Watson (Multifamily Lending Manager), and Sandy Smith (Invite pending acceptance). The top navigation bar includes the Procorem logo, a search bar, and the user's name 'Kelly'.

# Agenda

- **WorkCenter Files & Folders**
- WorkCenter Collaborators & Posts
- WorkCenter Tasks & Calendar
- WorkCenter Activity

# WorkCenter Files & Folders

The screenshot shows the Procorem WorkCenter interface. The top navigation bar includes the Procorem logo, a search bar, and the user profile 'Sara'. The breadcrumb trail is 'Home / NYSHCR / 10T102 - INTERNAL'. The left sidebar contains navigation options: Files, Posts, Tasks, Calendar, Activity, WorkCenter Settings, Links, Diversity, and Tenant Income Certification. The main content area is titled 'Files' and features buttons for 'Upload Files', 'Create Folder', and 'Actions'. It displays a folder structure with four folders: 'Application' (1 file, 0 subfolders, created 3 months ago), 'Award Letter' (2 files, 0 subfolders, created 2 months ago), 'Executive Summary' (2 files, 0 subfolders, created 2 months ago), and 'Grant Agreement' (1 file, 0 subfolders, created 2 months ago).

Create folder structure to organize files – note that Folder names must be unique inside a given WorkCenter

Upload files with automatic versioning and ability to comment – click Details button for version information.

This screenshot shows the Procorem WorkCenter interface with the 'Application' folder selected. The breadcrumb trail is 'Home / NYSHCR / 10T102 - INTERNAL / Application'. The left sidebar is partially visible. The main content area shows the 'Files' section with buttons for 'Upload Files', 'Create Folder', and 'Actions'. Below these buttons is a file upload area with the text '...Up a level ↑'. A file named 'AcqRehab RFP 10T102.xlsx' is shown, with details: 10 comments, 4 likes, 0 dislikes, 121.60 kb, Final version, and created 3 months ago. A 'Details' button is visible next to the file. The right sidebar shows the 'Add Collaborator' section with a list of users: Carolann Spence (Contributor), dominic martello (Pending workcenter access), Elaine Chang (WorkCenter Owner), and HFA Service User (Pending workcenter access).

# WorkCenter Files & Folders

The screenshot displays the Procorem WorkCenter interface. At the top, the Procorem logo is visible on the left, and a search bar is on the right. The breadcrumb navigation shows the path: Home / ABC Housing Authority / Garden Court Apartments (Deal). The left sidebar contains navigation options: Garden Court Apartments (Deal), ABC Housing Authority, Files, Posts, Tasks, Calendar, Activity, and WorkCenter Settings. The main content area is titled 'Files' and includes 'Sort' and 'Filter' options. A toolbar contains three buttons: 'Upload Files' (highlighted with a red box), '+ Create Folder', and 'Actions'. Below the toolbar, a list of folders is shown:

Folder Name	Files	Folders	Created	By
Applications & Underwriting	6	2	5 days ago on (Sep 24 2020)	Joe Cherry
Compliance	4	0	10 months ago on (Nov 26 2019)	Kelly Encinias
Construction Inspections	0	0	11 months ago on (Nov 11 2019)	Kelly Encinias
Draw Requests	1	0		

A red arrow points from the 'Upload Files' button to the 'Applications & Underwriting' folder.

To upload a File – select the folder where you would like to upload the file and then click the Upload Files button

# WorkCenter Files & Folders

The screenshot displays the Procorem WorkCenter interface. At the top, there is a navigation bar with the Procorem logo, a search bar labeled "Search this WorkCenter", and a user profile for "Kelly". Below the navigation bar, a breadcrumb trail reads: "Home / ABC Housing Authority / Garden Court Apartments (Deal) / Applications & Underwriting / Upload Files".

The main content area is titled "Select Files" and features a large dashed box containing the instruction: "Drag and drop multiple files using Internet Explorer 10+, Firefox, Chrome, or Safari". Below this instruction, the word "OR" is centered, followed by a "Choose File" button. A red rectangular box highlights the entire "Select Files" area.

On the left side, there is a sidebar with a navigation menu. The menu items are: "Files", "Posts", "Tasks", "Calendar", "Activity", "WorkCenter Settings", and "Links". Above the menu is a header for "ABC Housing Authority" with a corresponding image.

Below the "Select Files" area, there is a "Status" dropdown menu currently set to "--Select--". A small plus sign (+) is visible next to the dropdown. Below the dropdown, a note reads: "Click plus to add a new status. Manage statuses in Account settings."

Upload one or many files at time



# WorkCenter Files & Folders

The screenshot displays the Procorem WorkCenter interface. The top navigation bar includes the Procorem logo, a search bar labeled "Search this WorkCenter", and a user profile for "Kelly". The left sidebar shows navigation options: "Garden Court Apartments (Deal)", "ABC Housing Authority", "Files", "Posts", "Tasks", "Calendar", "Activity", "WorkCenter Settings", and "Links". Below the sidebar are buttons for "Favorite this WorkCenter" and "Email this WorkCenter".

The main content area is titled "OR" and features a red-bordered box containing a list of selected files for upload:

- Loan App GC.xlsx
- Supporting Document 1.docx
- Supporting Document 2.docx

Below the file list, there are form fields for "Status" (set to "--Select--"), "Type" (set to "--Select--"), "Description" (with a note: "Include a description for all uploaded file(s)"), and "Comment" (with a note: "Comments will be included in email alerts sent to other collaborators."). At the bottom right, there are "Cancel" and "Upload" buttons, with the "Upload" button highlighted by a red border.

After selecting file(s) to upload, you will click the Upload button. Procorem will send out emails to all Collaborators to inform them of the files uploaded

# Agenda

- WorkCenter Files & Folders
- **WorkCenter Collaborators & Posts**
- WorkCenter Tasks & Calendar
- WorkCenter Activity

# WorkCenter Collaborators & Posts

**Add Collaborator**

**Karen Cole**  
WorkCenter Owner

**Peddy Ligonde**  
Contributor

**Sara Surprenant**  
WorkCenter Owner

ssurprenant@prolinksolutions.com

Connection:  
WorkCenter Owner

**Leave WorkCenter**

Configure email preferences for this WorkCenter:

Immediate Emails?

Include in Digest?

**Sheldon Martin**  
WorkCenter Owner

**Collaborators** are the people that have been invited to the WorkCenter

## Communicating with Collaborators:

- Posts—goes to collaborators' email AND tracked in Procorem
- Reply to WorkCenter emails directly from Outlook
- Control the emails that collaborators receive from this WorkCenter

# WorkCenter Collaborators & Posts

procorem

Search this WorkCenter

← Garden Court Apartments (Deal)

ABC Housing Authority

Files

**Posts**

Tasks

Calendar

Activity

WorkCenter Settings

Links

Tenant Event Portal

★ Favorite this WorkCenter

Home / ABC Housing Authority / Garden Court Apartments (Deal)

Posts

New Post:

Posting here sends an email to all Collaborators!

Create Post

Jane Lewis 6 days ago on (Sep 23 2020) Edit  
Harry, our legal counsel just reviewed your LPA v3 and made comments. I just uploaded that as v4. Take a look

Ryan Kim a month ago on (Sep 02 2020) Edit

**Posts** are saved on the WorkCenter and emailed to ALL collaborators

# Agenda

- WorkCenter Files & Folders
- WorkCenter Collaborators & Posts
- **WorkCenter Tasks & Calendar**
- WorkCenter Activity

# WorkCenter Tasks & Calendar

The screenshot displays the WorkCenter interface for '15 Copiage Commons'. The top navigation bar shows 'Home / NYSHCR / 15 Copiage Commons'. The left sidebar includes 'Files', 'Posts', 'Tasks', 'Calendar', 'Activity', and 'WorkCenter Settings'. The main content area is titled 'Tasks' and features a 'Developer' dropdown menu. Two tasks are listed:

- Applicant Certification executed by CEO** (1 icon)
  - Not Assigned - Developer
  - No Approvers - Project Manager
  - New
  - Created 7 months ago (Jan 08 2020) by Pervez Khan
- Omnibus Certifications executed by a Principal** (1 icon)
  - Not Assigned - Developer
  - No Approvers - Project Manager

Buttons for 'View: WorkCenter Role', 'Show Completed', 'Hide Details', 'Add Collaborator', and 'Create New Task' are visible. Below the tasks, there are options to 'Favorite this WorkCenter' and 'Email this WorkCenter'.

The right side of the interface shows a 'Calendar' view for July 2020. The calendar grid shows dates from 28 to 31. A task is highlighted on July 30th, labeled '12: Application Certification executed by CEO'. To the right of the calendar is an 'Add Collaborator' section with a list of users: Karen Cole (WorkCenter Owner), Peddy Ligonde (Contributor), Sara Surprenant (WorkCenter Owner), and Sheldon Martin (WorkCenter Owner).

Tasks help you stay on track in your project and help WHEDA monitor your project

Tasks are displayed in the WorkCenter Calendar

# WorkCenter Tasks & Calendar

The screenshot displays the WorkCenter interface for '15 Copiage Commons'. The top navigation bar includes 'Home / NYSHCR / 15 Copiage Commons'. The left sidebar contains navigation options: Files, Posts, Tasks (selected), Calendar, Activity, and WorkCenter Settings. The main content area is titled 'Tasks' and features a 'Developer' dropdown menu. Two tasks are listed:

- Applicant Certification executed by CEO** (1 icon)
  - Not Assigned - Developer
  - No Approvers - Project Manager
  - New
  - Created 7 months ago on (Jan 08 2020) by Pervez Khan
- Omnibus Certifications executed by a Principal** (1 icon)
  - Not Assigned - Developer
  - No Approvers - Project Manager

Buttons for 'View: WorkCenter Role', 'Show Completed', 'Hide Details', 'Create New Task', and 'Add Collaborator' are visible. The 'Add Collaborator' button is also present in the top right of the task list.

The bottom section shows the 'Calendar' for July 2020. The calendar grid displays dates from 28 to 31. A task is highlighted on July 30th: 'Application Certification executed by CEO'. The right sidebar of the calendar view includes an 'Add Collaborator' button and a list of users: Karen Cole (WorkCenter Owner), Peddy Ligonde (Contributor), Sara Surprenant (WorkCenter Owner), and Sheldon Martin (WorkCenter Owner).

All **Tasks** are created and assigned by WHEDA

Developers/Owners/Agents are responsible for **completing the Tasks** and marking them as such

# WorkCenter Tasks & Calendar

Complete Tasks from the list screen or by clicking on a Task to access the detail screen

The screenshot displays the Procorem WorkCenter interface for the 'Garden Court Apartments (Deal)'. The left sidebar contains navigation options: Files, Posts, Tasks (highlighted with a red box), Calendar, Activity, WorkCenter Settings, Links, and Tenant Event Portal. The main content area shows a breadcrumb trail: Home / ABC Housing Authority / Garden Court Apartments (Deal). Below this, the 'Tasks' section is visible, with filters for 'View: Task Group', 'Show Completed', and 'Hide Details', and a '+ Create New Task' button. The 'Application Submission' section shows 'No Tasks Found'. The 'Initial Review' section contains a task card for 'Initial Underwriting' (highlighted with a red box). This card shows a progress indicator of 0/2 and 0/5, a thumbs-up icon (highlighted with a red box), and a hand cursor icon (highlighted with a red box) in the bottom right corner. The task details include assignees, approval from, due date, and creation information. Below this, the 'Due Diligence' section shows a task card for 'Entitlement' with a progress indicator of 0/1 and 0/6.



# WorkCenter Tasks & Calendar

Home / ABC Housing Authority / Garden Court Apartments (Deal) / Edit Task

**Edit Task**

✓ Main (0) Comments (1) Reminders (1) Files Activities

Task Title: Initial Underwriting

Status: Pending Assignees  
0/2 assignees have finished this task  
0/5 approvers have approved this task

Task Group: Initial Review

Description: [Empty text area]

Location: [Empty text field]

Start Date: 07/27/2020 12:00 AM

Due Date: 07/31/2020 12:00 AM

Using (UTC-07:00) Mountain Time (US & Canada). Click [here](#) to change your time zone.

Assigned To: Assignees

- Development Officer
- Debbie Lee
- Harry Zulauf

Any assignee can mark task as finished

Note that you can add **Comments** directly to a Task as well as attach **Files** that might support the work you completed

# Agenda

- WorkCenter Files & Folders
- WorkCenter Collaborators & Posts
- WorkCenter Tasks & Calendar
- **WorkCenter Activity**

# WorkCenter Activity

← Baisley Park Gardens    Home / NYSHCR / Baisley Park Gardens


NEW YORK STATE OF SOCIAL SERVICES | Homes and Community Renewal

- Files
- Posts
- Tasks
- Calendar
- Activity**
- WorkCenter Settings
- Links
- Diversity
- Tenant Income Certification

★ Favorite this WorkCenter


✉ Email this WorkCenter


### Activity


 Sara Surprenant created a new task in a few seconds on (Jul 30 2020) Flag

✓ **Application Certification executed by CEO**


Start Date: 07/30/2020 12:00 AM  
Due Date: 07/31/2020 12:00 AM  
Sara Surprenant was **added as a follower** to this task


 NYSHCR Baisley Park Gardens

 Sara Surprenant removed a collaborator 12 minutes ago on (Jul 30 2020) Flag

 **Baisley Park Gardens**


HFA Service User was removed from the Baisley Park Gardens WorkCenter

 NYSHCR Baisley Park Gardens

 Peddy Ligonde finished a task 10 days ago on (Jul 20 2020) Flag

✓ **mor**

Peddy Ligonde finished this task for HFA Service User  
**1 out of 1** assignees have finished this task  
The task is **complete** because at least one assignee must finish this task.

 NYSHCR Baisley Park Gardens

All Activity for the WorkCenter is recorded for audit purposes—regardless of the action or the collaborator

# How to access the Help Center



## Procorem Help Center

<https://help.procorem.com>

## Procorem Support

[wheda.helpdesk@wheda.com](mailto:wheda.helpdesk@wheda.com)

## Procorem Website

[www.Procorem.com](http://www.Procorem.com)