





How to send files to Virginia Housing via Procorem.com

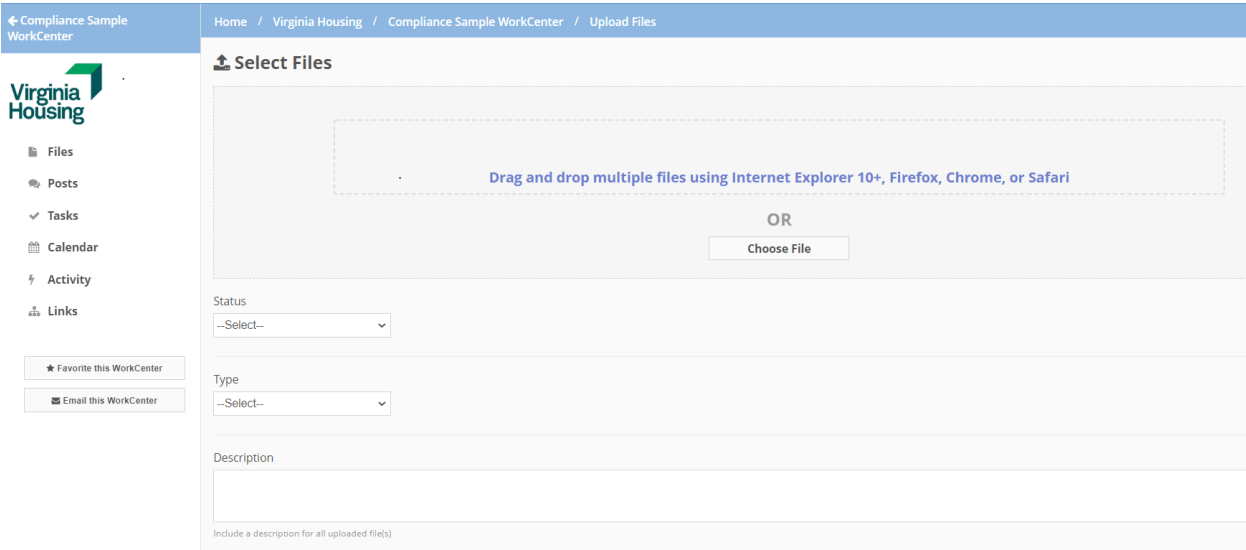
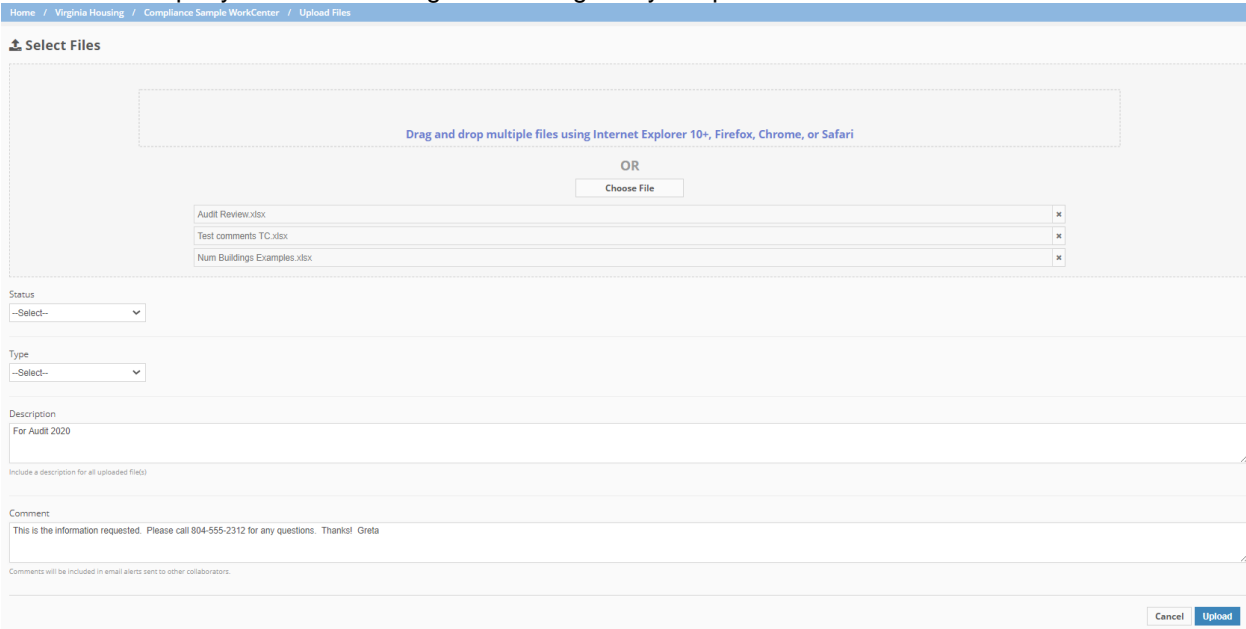
Revised Date	07/17/2020
Purpose	Procorem is a web-based portal that allows safe transmission of files to Virginia Housing. You do not need your own Procorem account. We are inviting you to be a guest on our account. This is a step-by-step procedure to submit files via Procorem.com.

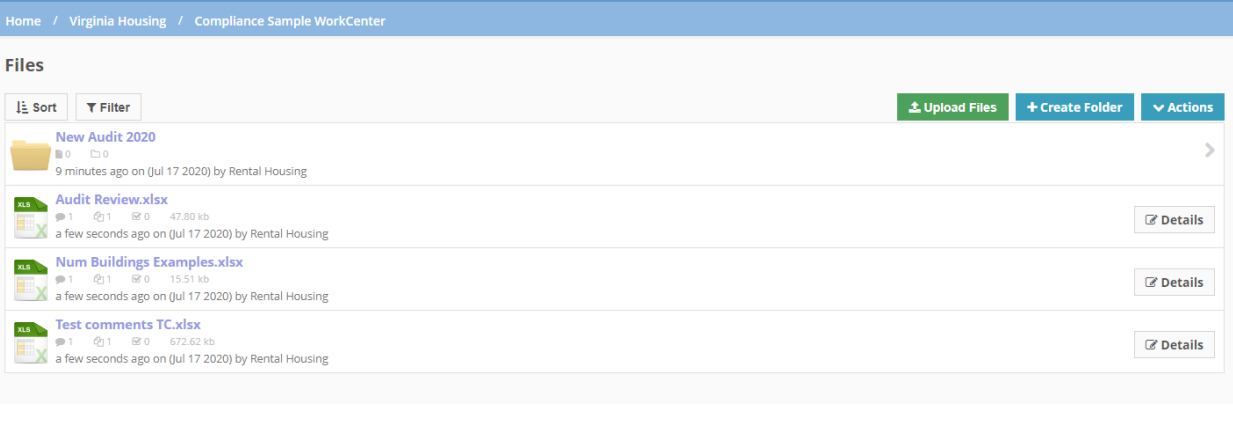
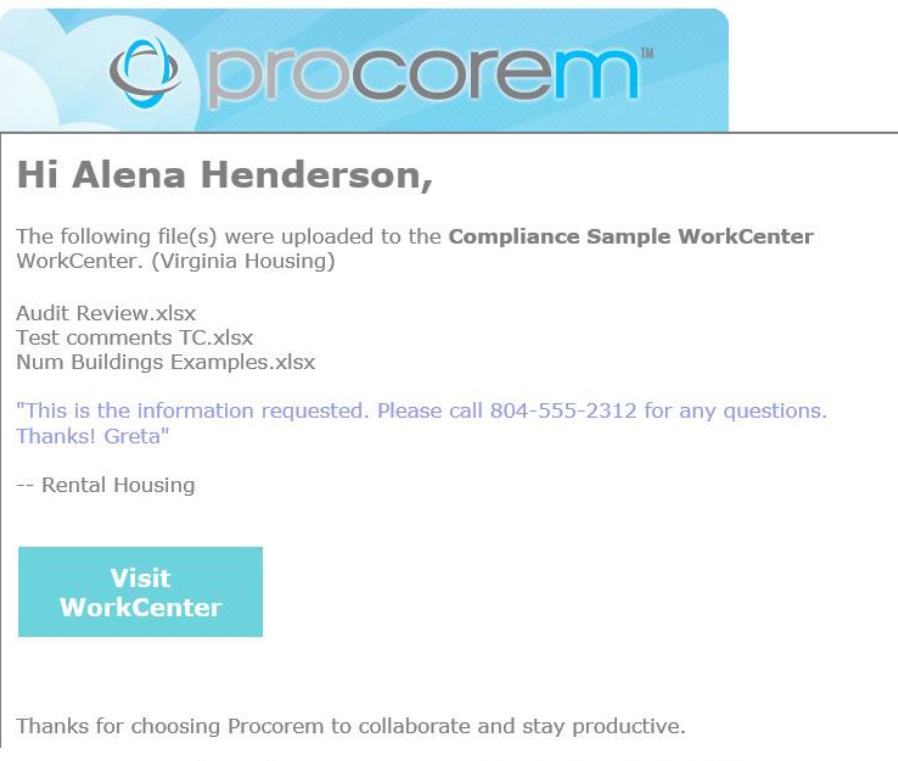
A. Getting Started with Procorem

Step	Action
1	<p>Once invited to a WorkCenter by a Virginia Housing Associate, you will receive an email inviting you to join Procorem. Please be sure to check your spam folder since this email may be sent there on the first communication.</p> <p>Alena Henderson invited you to collaborate in Procorem! Inbox x</p> <p>Alena Henderson <notifications@mail.procorem.com> Unsubscribe to TestVHDArental ▾</p>  <p>Hi Rental Housing,</p> <p>You've been invited to collaborate on a new Account in Procorem by Alena Henderson, the one place to easily invite, collaborate, plan, and share information!</p> <p>Please join my private and secure Compliance Sample WorkCenter WorkCenter.</p> <p>Alena Henderson Virginia Housing</p> <p>Sign Up</p> <p>Thanks for choosing Procorem to collaborate and stay productive.</p> <p>Let's get to work! All of us on the Procorem team</p> <p>Read our blog Got questions? Connect!   </p> <p>Procorem 98 Inverness Drive East, Suite 250, Englewood, CO 80112</p> <p>You are receiving this email because you signed up to receive notifications or were invited to collaborate by a colleague. To</p>

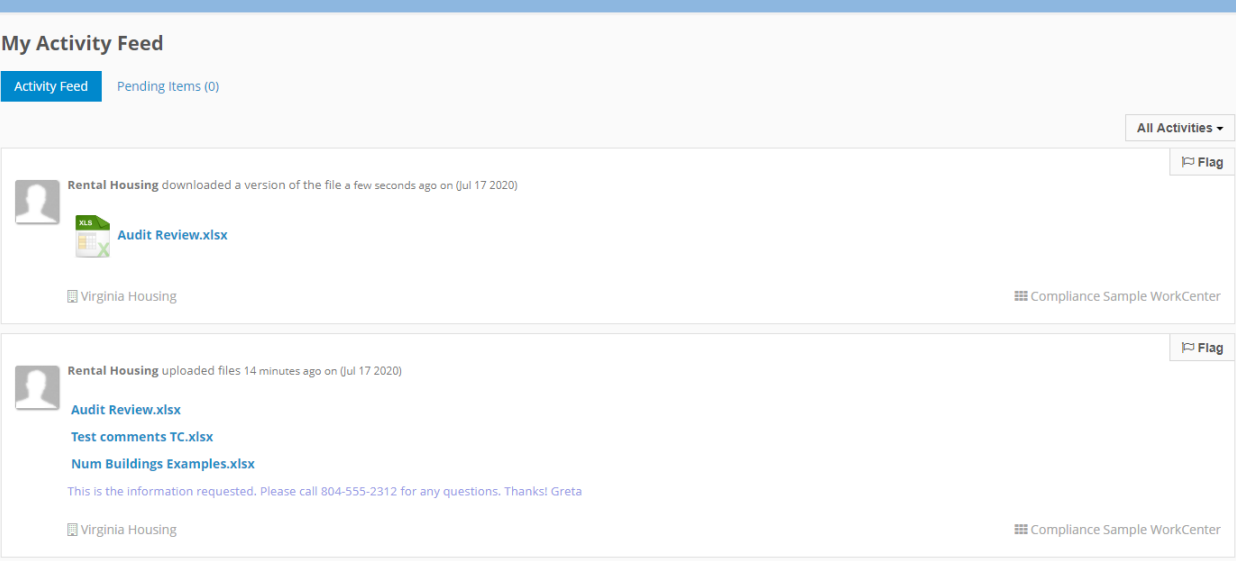
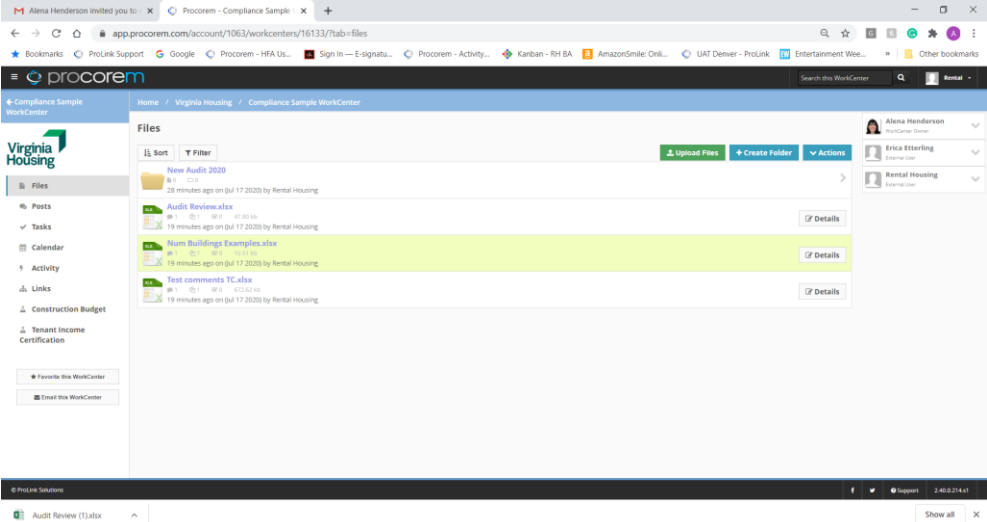
Step	Action
2	<p>Within the email, click on the link Sign Up to be directed to Procorem.com.</p> <p>You will see a record with your name and your email address. You must set your own password. As you enter a password, Procorem will indicate if you met all of the password rules. All the rules must be green and the "I agree to terms" must be checked before you click SIGN UP NOW.</p>
3	<p>To access Procorem after the first time, go to app.procorem.com. Your email is your username.</p>

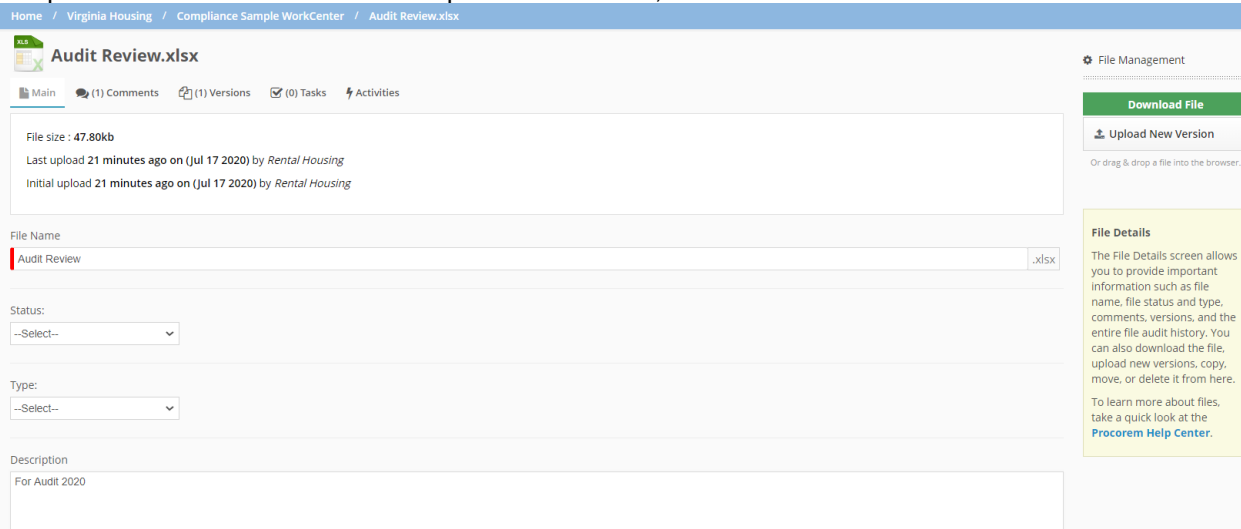
Step	Action
<p>4</p>	<p>Once logged in, you will be within VHDA’s main portal. The first screen you see will be labeled My Activity Feed. This screen provides a running list of all the activity within your work centers.</p> <p>On the left menu bar, you should see options for all the work centers that you are assigned to. Click on a specific work center. If you have more than 5 workcenters, click View All to see a full list.</p>  <p>Note: If you click on the X on the Welcome message, it will not appear again. Clicking on your name in the top right will allow you to update your profile. Only your email address cannot change within the account (since it acts as your user name).</p>
<p>5</p>	<p>The right panel lists all users that have access to this site. Please contact your Virginia Housing associate to add any other users from your organization. For security reasons, we ask that you do not share accounts.</p>
<p>6</p>	<p>Once within the work center, there are options on the left. For the purposes of file transfer, we are primarily interested in Files. Some folders may already be available for you or you can create a new folder.</p> <p>Folders are not required to send information – only for organizing. Click to open the appropriate folder. Screen will display all files included at this level of the system.</p> 

Step	Action
<p>7</p>	<p>Click Upload Files at the top of the screen to add one or more files. A new window will appear. You can drag files into the section provided or click on Choose File to gain access to your Windows Explorer to select the file from your computer.</p> <p>Note: Clicking on the breadcrumbs (or titles in blue) can help navigate to other areas of the system.</p> 
<p>8</p>	<p>You may load one or more files at a time.</p> <p>You may add a description that will remain with the file in the work center. You may also add a comment that will accompany the notice to Virginia Housing that you uploaded a file.</p> 

Step	Action
<p>9</p>	<p>Click Upload at the bottom of the page. You will see a message at the top of the page indicating that the file has been uploaded.</p> <p>You will be returned to the folder. You should see your file(s) there.</p>  <p>The screenshot shows a file management interface with a breadcrumb trail: Home / Virginia Housing / Compliance Sample WorkCenter. Below this, there's a 'Files' section with 'Sort' and 'Filter' options. On the right, there are buttons for 'Upload Files', 'Create Folder', and 'Actions'. The main area displays a folder named 'New Audit 2020' (created 9 minutes ago) and three files: 'Audit Review.xlsx' (47.80 kb), 'Num Buildings Examples.xlsx' (15.51 kb), and 'Test comments TC.xlsx' (672.62 kb). Each file has a 'Details' link.</p>
<p>10</p>	<p>If you need to replace a file, you may upload the file again with the same name and it will create a new version. Or you may contact Virginia Housing delete it.</p>
<p>11</p>	<p>Once your files are uploaded, an email will automatically go to our staff notifying them that the file(s) are available. You will also receive a copy of this email.</p>  <p>The email screenshot features the Procorem logo at the top. The recipient is 'Hi Alena Henderson,'. The message states: 'The following file(s) were uploaded to the Compliance Sample WorkCenter WorkCenter. (Virginia Housing)'. The files listed are 'Audit Review.xlsx', 'Test comments TC.xlsx', and 'Num Buildings Examples.xlsx'. A note says: '"This is the information requested. Please call 804-555-2312 for any questions. Thanks! Greta"'. The sender is 'Rental Housing'. A prominent blue button says 'Visit WorkCenter'. The email concludes with 'Thanks for choosing Procorem to collaborate and stay productive.'</p>
<p>12</p>	<p>You will see that we downloaded files from the Activity Feed when you first log into Procorem.</p>

B. Working with files from Procorem

Step	Action
<p>1</p>	<p>Once Files are loaded, any collaborator on the account can download files.</p> <p>You can see that we downloaded files from the Activity Feed when you first log into Procorem or from within the Activity option on the left panel of the workcenter.</p>  <p>The screenshot shows the 'My Activity Feed' interface. At the top, there's a 'Pending Items (0)' indicator. Below, two activity items are listed. The first item, from 'Virginia Housing', shows a download of 'Audit Review.xlsx'. The second item, also from 'Virginia Housing', shows an upload of three files: 'Audit Review.xlsx', 'Test comments TC.xlsx', and 'Num Buildings Examples.xlsx'. A note below the second item reads: 'This is the information requested. Please call 804-555-2312 for any questions. Thanks! Greta'. Both items have a 'Flag' button and are associated with the 'Compliance Sample WorkCenter'.</p>
<p>2</p>	<p>To download a file, access the workcenter. Highlight the row of the file you want and then click. The file will download based on your browser or laptop settings.</p>  <p>The screenshot shows the 'Files' section of a Procorem workcenter. The browser address bar shows 'app.procorem.com/account/1063/workcenters/16133/?tab=files'. The interface includes a sidebar with navigation options like 'Files', 'Posts', 'Tasks', 'Calendar', 'Activity', 'Links', 'Construction Budget', and 'Tenant Income Certification'. The main area displays a list of files under the heading 'New Audits 2020'. The files listed are 'Audit Review.xlsx', 'Num Buildings Examples.xlsx', and 'Test comments TC.xlsx'. The 'Num Buildings Examples.xlsx' file is highlighted in green. The interface also includes buttons for 'Upload Files', 'Create Folder', and 'Actions'. The bottom of the screenshot shows the file 'Audit Review (1).xlsx' being downloaded.</p>

Step	Action
<p>3</p>	<p>To update the details of the file or see previous versions, click on Details.</p> 
<p>4</p>	<p>Click upload new version to replace the existing version with an updated one. The previous will be available under the Versions tab but the original screen will only download the most current. (updating a version will trigger an email to all collaborators)</p>
<p>5</p>	<p>Click on the Comments tab if you want to make comments or respond to comments about this particular file. (adding a comment will trigger an email to all collaborators with a link to enter a response)</p> 