

# Electronic Application and Form Information

June 4, 2019

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## Introduction

IHFA has a new internal system, ProLink HFA, to use for capturing project data, as well as a web-based portal (Procorem) for document sharing externally. This allows us to provide the application and other documents for you to download within specified folders. You will use the same folders to upload the completed application and supporting documents. The following information will help you understand the new tools and how to use Procorem.

## Low-Income Housing Tax Credit/HOME/Housing Trust Fund Application

The latest version of the Low-Income Housing Tax Credit/HOME/Housing Trust Fund Application is "mapped" to allow the data to be sent into our internal ProLink HFA system, and you will obtain a Procorem workcenter to upload an electronic version of the application and supporting documents.

When you request access to the Procorem web-based portal to submit an application:

- You must provide first and last names and email addresses for persons that require access
- Each person will receive an email message with a link to Procorem that includes a temporary password, and when logging on for the first time, they will be prompted to set a new password.
- A Procorem "workcenter" will be created for you that contains folders and documents necessary for the 1st stage, when moving into the 2nd and 3rd stages, additional folders/documents will be added

**NOTE:** *If at any time a password is forgotten or you can't find the email with the temporary password, click the **Forgot Password** link on the login screen to receive a new email. Here is a link to the Login screen: <https://app.procorem.com/login>*



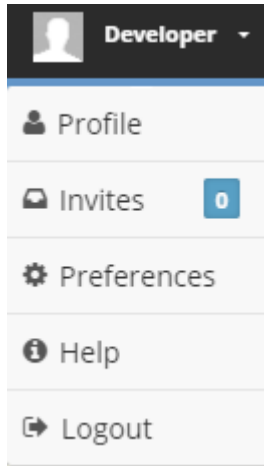
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## Using Procorem

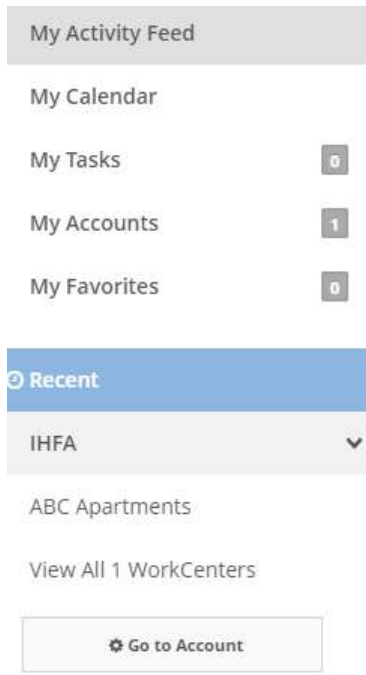
The following will help you get started and navigate in **Procorem**.


Your name displays in the top right corner (Example Name in image below is Developer). Click the arrow to the right of your name to perform the following actions:



- Select your **Profile** or **Preferences** to add information or make changes
- Select **Help** to open the Procorem Help files
- Select **Logout** to exit the web-based portal

## Left-side Menu Options:



- **My Activity Feed** displays the Welcome to Procorem banner and workcenter activities (uploads, changes, etc.) to which you have access. (From within a workcenter, clicking Activity Feed displays only activity for that workcenter).
- **Calendar** and **Tasks** are not currently being used; however, you will be notified if IHFA decides to utilize them.
- **My Accounts** shows the number of Procorem Accounts to which you have access. Click to open account listing
- **My Favorites** shows the number of Favorites to workcenters you have added by clicking . Click to go to your Favorites links.
- **Recent** contains your Account(s) (i.e. IHFA), recent workcenters you have opened (click name to open again), and View All # Workcenters can be clicked to open all workcenters to which you have access.
- **Go To Account** (as displayed in example on right) will open the IHFA account and display the workcenters to which you have access.

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## Workcenter Use and Navigation:

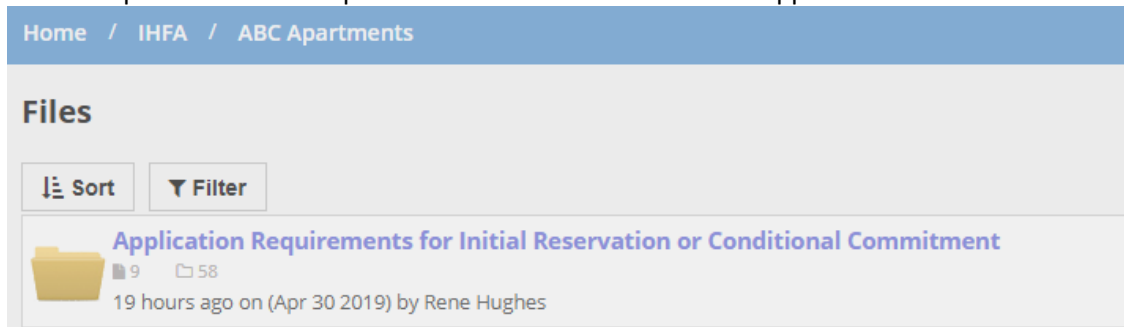
### Opening a Workcenter:

- Click workcenter name in the left menu (if present).
- Click **View all # Workcenters** or **Go To Account** in the left menu, and then click workcenter name.
- Enter the workcenter name (full or partial) in the Search area to the left of your name on the top right of the screen, press enter, and then click the workcenter name in search results.

### Workcenter Folders and Files

- Folders are used to organize and store files.
- You can download and upload files, and you can also upload new versions of existing files and view old versions of files that have more than one version (see Uploading/Downloading files).
- You cannot delete or move folders or files, and will need to contact IHFA to request these actions.

The example below is ABC Apartments workcenter for the first Application Phase:

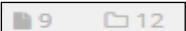


- Click a folder to open

The example below displays a partial view after clicking the folder shown in example above:



### NOTES:

- The blue navigation bar at the top of the screen (see examples above) allows you to click an item to go back to a folder, workcenter, account, or Home level.
- Below a folder name, the pictures and numbers represent the number of files/folders contained within that folder. 

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## Downloading Files

Download files as follows:

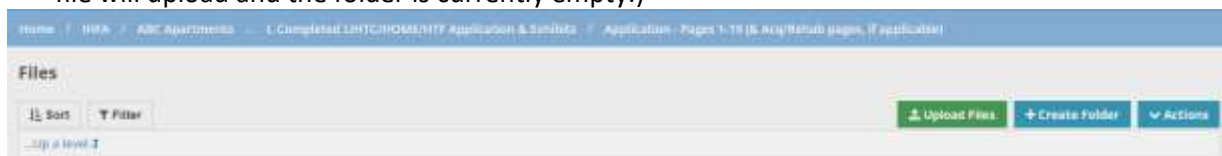
- Click a folder to open, click a file within a folder to download.
- After clicking to open/download a file, it may open, or it may show in the bottom corner of your browser, and you must click on it again to open. This depends on your browser settings.
- If you need to edit a downloaded file, you must click **Enable editing** and save the file to your computer.
- In the example below, you could click to download the pdf file at the bottom, or click to open one of the top two folders to download a file contained within them (the third folder does not contain any files to download).



## Uploading Files

Upload files as follows:

- Open the workcenter and folder within the workcenter where you need to upload the file, then click **Upload Files** (the example below shows the folder in the blue navigation bar where the file will upload and the folder is currently empty.)



See next page for additional Upload information.

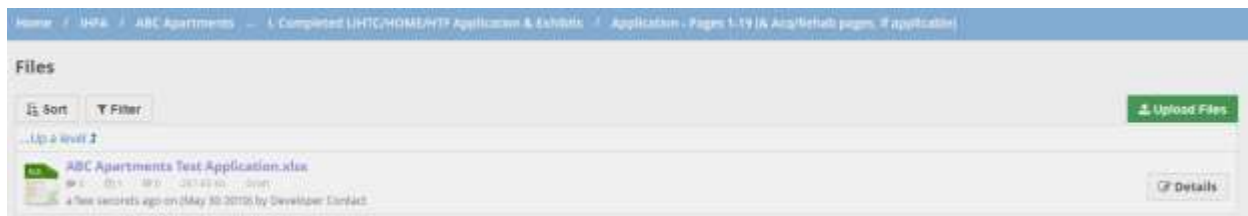
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- The Upload files window (shown below) allows you to drag and drop file(s) from your file listing or click **Choose File** to browse to a file(s).
- You can select multiple files to upload using either option, if you want more than one file to go into the folder you have selected.
- For **Status** select **Final** or **Draft**. You do not need to select a **File Type**, unless IHFA has asked you to do so.
- Enter a **Description** or **Comment** if desired, or leave these blank.
- Once you have selected the file(s) and entered desired information, click the **Upload** button at the bottom of the screen (you may need to scroll down).



- A status bar will display at the top and let you know when the upload is successful.
- When the upload is finished, the file will be accessible in the folder.
  - Notifications of the upload will be sent to those who have access to the workcenter (and have notifications turned on in their preferences).
  - Example below shows the file in the folder after the upload above finished.



### File Version Control

You can download and edit existing files as described above, you can also upload new versions, and download old versions of files, as follows:

- Navigate to the file.
- Click the Details button (shown in example above)

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- The details screen example below shows 2 versions of the same file, only the latest version displays and can be downloaded from the main screen.
- Click the **Upload New Version** button to select a new version of the file to upload
- Click any version to download that version of the file
- Click **Restore** to replace the main file version to a prior version of the file

