



Welcome to Procorem!


January 18, 2024

An introduction for Developers and Development Teams. Owners, syndicators, investors, and architects are welcome to attend.





RIHousing has partnered with ProLink Solutions for the purpose of monitoring multifamily developments

- RIHousing Development staff will be using ProLink going forward
 - Underwriting
 - Design & Construction
- Owners, agents, and more will access  [procorem](#)



PROLINK™ SOLUTIONS

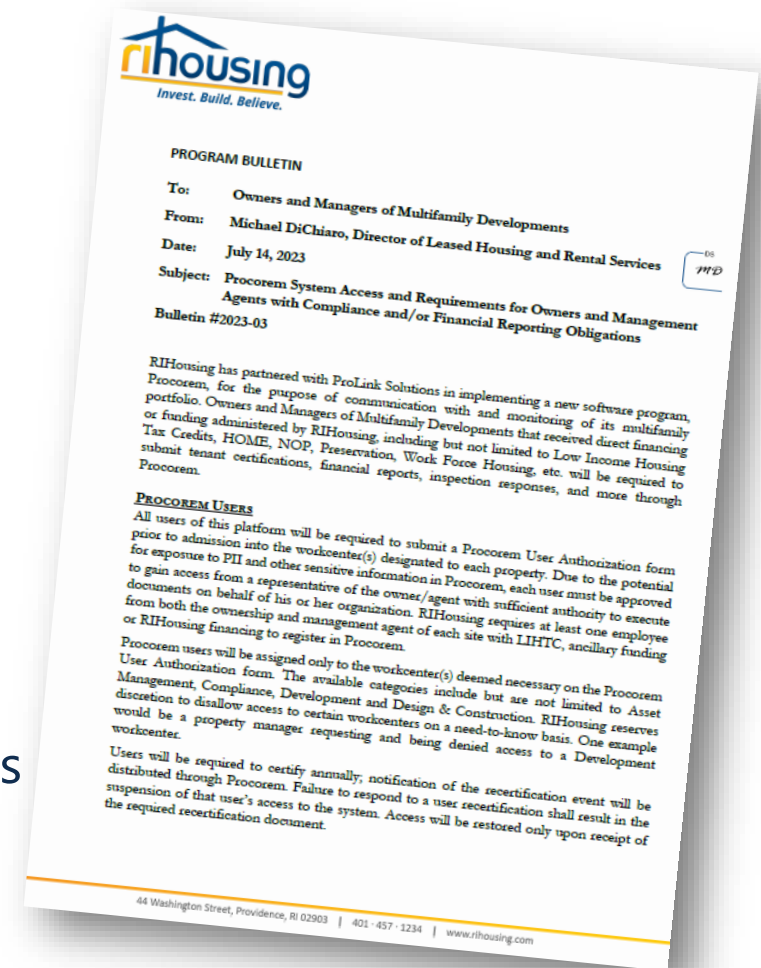


**ProLink recommends Google Chrome for best results,
but Microsoft Edge will work too.**



Program Bulletin #2023-03 circulated on July 14, 2023

- Procorem Users
- Procorem Workcenters
- Tenant Events
- Data Integrity
- Market Units
- Asset Management
- Multifamily Inspections & File Reviews
- Owner's Certifications
- Navigating the Workcenters



Program Bulletin #2024-01 circulated on January 4, 2024



MEMO

To: Developers and Development Team Members of Multifamily Developments
From: Anne Berman, Director of Real Estate Development 
Date: January 4, 2024
Subject: Procorem System Access and Requirements for Owners and their Development Team for Underwriting and Project Construction

Program Bulletin #2024-01

RIhousing has partnered with ProLink Solutions in implementing a new software program, Procorem, which has become the platform for underwriting all multifamily development transactions as of January 1, 2024. Owners and Developers of Multifamily Developments that received direct financing or funding administered by RIhousing, including but not limited to new construction, preservation, affordable or middle income will be required to submit all development, construction and property management related due diligence through Procorem from preliminary commitment through construction completion.

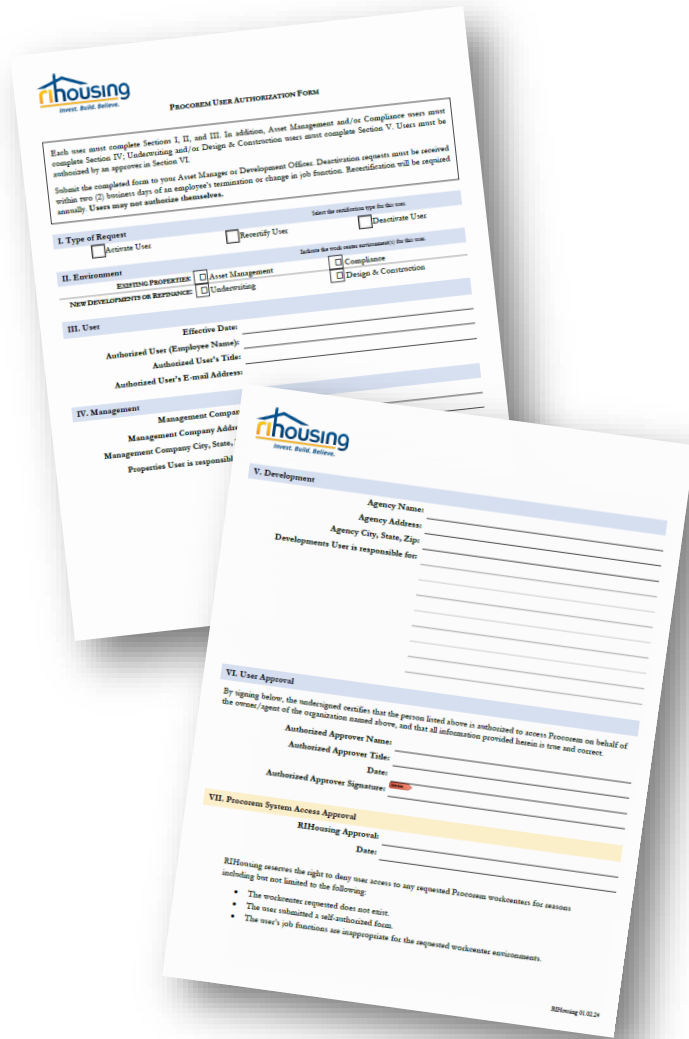
A separate Program Bulletin (2023-02) was released by the Leased Housing Division for owners and management agents with respect to compliance and financial reporting obligations.

PROCOREM USERS

All users of this platform will be required to submit a Procorem User Authorization form prior to admission into the workcenter(s) designated to each property. Due to the potential for exposure to Personal Identifiable Information (PII) and other sensitive information in Procorem, each user must be approved to gain access from a representative of the owner/agent with sufficient authority to execute documents on behalf of his or her organization. RIhousing requires at least one employee from both the ownership and management agent of each site with LIHTC, ancillary funding or RIhousing financing to register in Procorem.

Procorem users will be assigned only to the workcenter(s) deemed necessary on the Procorem User Authorization form. For purposes of this Program Bulletin, the available categories include but are not limited to Development and Design & Construction and Property Management. RIhousing reserves the discretion to disallow access to certain workcenters on a need-to-know basis. One example would be a civil engineer requesting and being denied access to an underwriting workcenter. Users will be required to certify annually; notification of the recertification event will be distributed through Procorem. Failure to respond to a user recertification shall result in the suspension of that

- Procorem Users
- Procorem Workcenters
- Navigating the Workcenters



Procorem Users

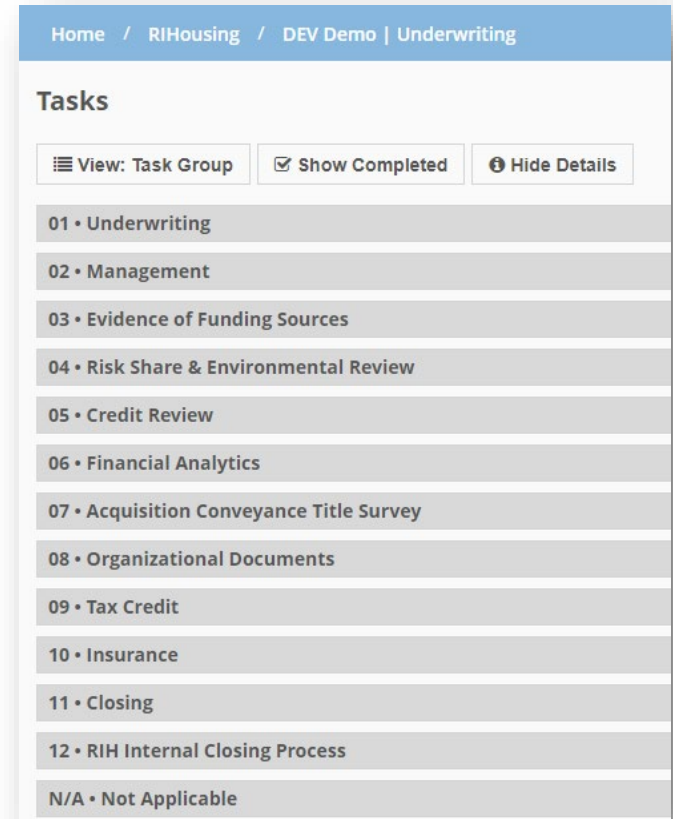
- All users are required to submit a Procorem User Authorization form
- At least one employee from ownership entity
 - RIHousing encourages as many users as would have had access to the former Smartsheets
- Workcenters are created for deals in the RIHousing Development pipeline
 - The submission of an application in OneStop App does not guarantee a workcenter invite
- Users will be recertified annually





Why Procorem?

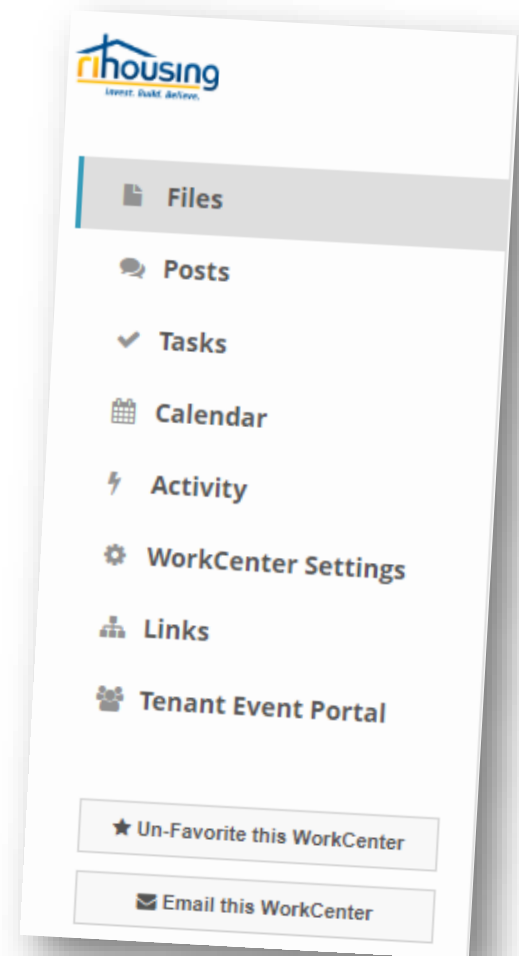
- Procorem workcenters replace Smartsheets previously used to collect due diligence and assist with project management
 - Underwriting
 - Design & Construction
- Workcenters mirror former Smartsheets and will be aligned with the specifics of each transaction
 - Eliminate items not relevant to the deal





Workcenters

- User-friendly
- Deal-specific
- System-generated reminders
- Transparency
- Tenant Event Portal is not applicable to this function



Workcenter Roles • RIHousing

Roles are assigned to workcenter users. This allows the Tasks to send reminders to the appropriate parties. RIHousing roles typically approve tasks.

Role	Underwriting	Design & Construction
RIHousing Development Officer	✓	✓
RIHousing D&C Specialist		✓
RIHousing Assistant Director	✓	✓
RIHousing D&C Manager		✓
RIHousing Tax Credit Administrator	✓	✓

Workcenter Roles • Partners

Roles are assigned to workcenter users. This allows the Tasks to send reminders to the appropriate parties. Partner roles typically complete tasks.

Role	Underwriting	Design & Construction
Borrower	✓	✓
Architect		✓
Contractor		✓

RIHousing may add and amend workcenter roles to better suit the process as more of our partners are invited into Procorem.

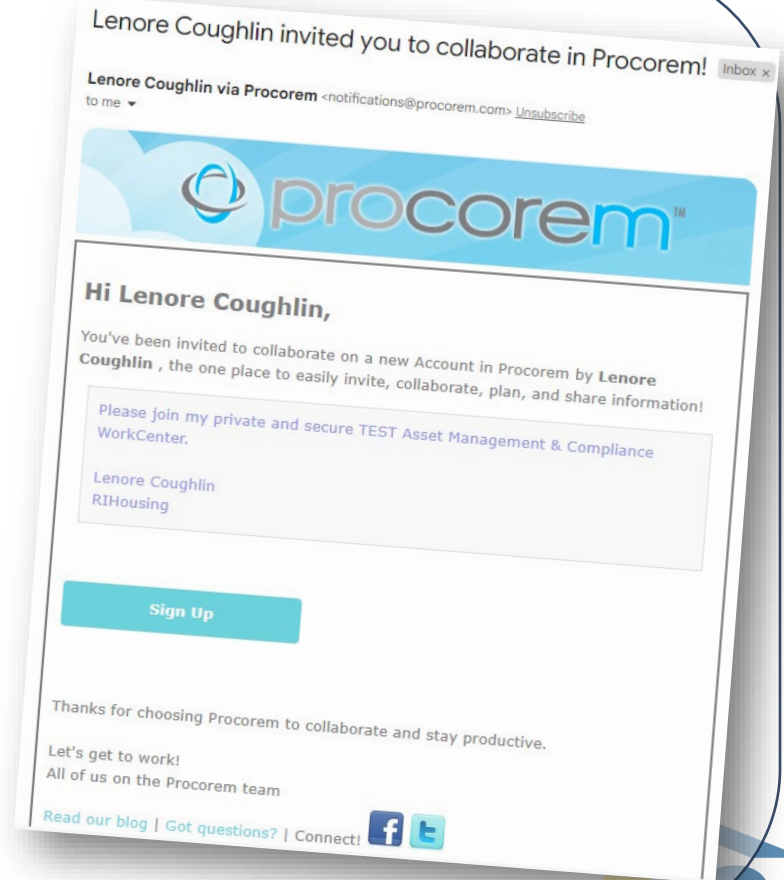


Workcenter Invitations

When a RIHousing employee invites an external user to a workcenter, a notification is sent to that user's e-mail address.

This example focuses on a first-time user's perspective of the signup procedure.

 Click **Sign Up**



Sign Up

The Sign Up button opens the link in an internet browser; another verification e-mail will be sent after you finish signing up.


- 🌀 Enter your **First Name**
- 🌀 Enter your **Last Name**
- 🌀 Create a secure **Password** using the criteria in the window
 - No spaces
 - At least 1 number
 - At least 1 capital letter
 - At least 1 lowercase letter
 - At least 8 characters long




Check your E-mail

You're almost done! When you see this screen that's your queue to check your e-mail for the final step.

 **Check your e-mail**



CONFIRM ACCOUNT


 An email confirmation has been sent to the email address identified below. Please click on the confirmation button within the email message to complete the sign up process.

Name

Email

[Resend Confirmation](#)

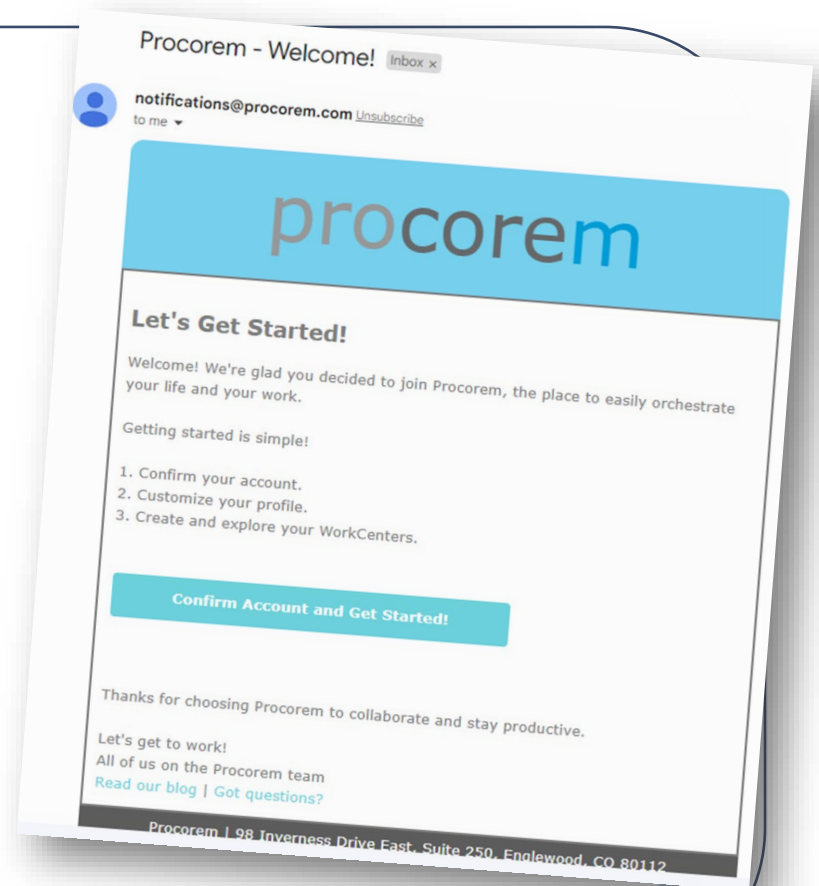
[Cancel](#)



Confirm your Account

All that's left to do is confirm your account before you sign into Procorem.

 Click **Confirm Account and Get Started!**



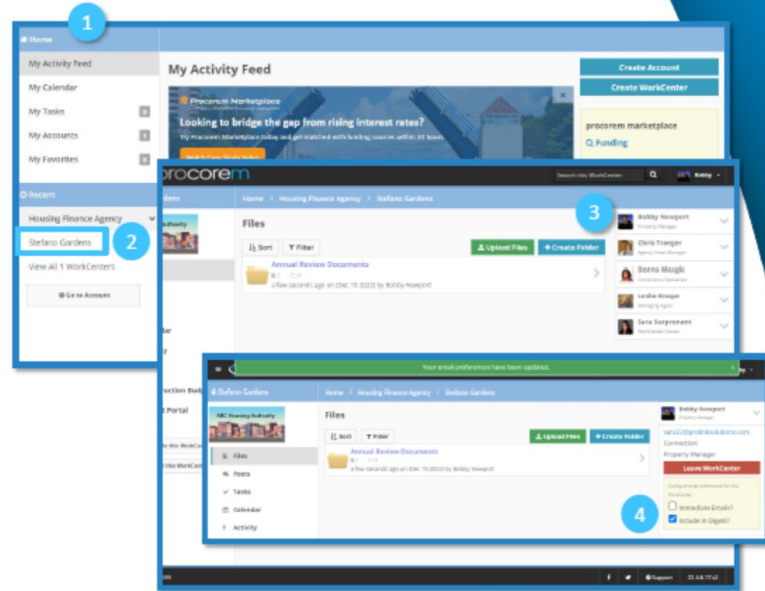
Didn't Get Your Invite?

- Check your junk mail
- Contact your IT Department to whitelist
notifications@procurement.com
- Contact Procurement System Admin to confirm your e-mail address



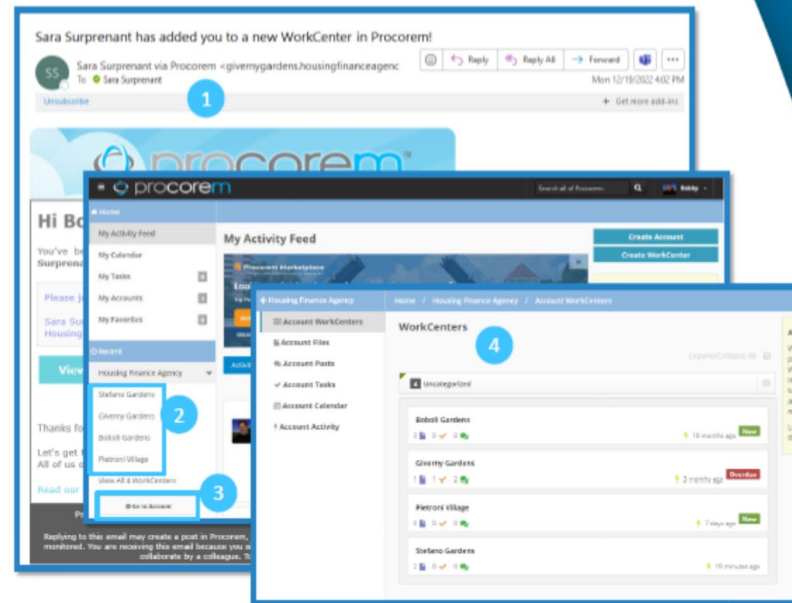
Invitation to Procorem

- 1 After clicking **Sign Up Now**, you'll be taken to the **Procorem Home** page.
- 2 On the left, you'll see the name of the **Agency** and the **WorkCenter** representing your property. Click on the name of the **WorkCenter** to access the **WorkCenter**.
- 3 Note other collaborators on the **WorkCenter**, including **Agency** contacts.
- 4 **Procorem** emails notifications in real time for file, post, and **WorkCenter** activities – if you'd like to receive one daily digest email instead of immediate emails, click the down arrow next to your name and deselect **Immediate Emails**.



Invitation to Procorem

- 1 Once you've created your account, you'll receive an email invitation for each **WorkCenter** you've been added to.
- 2 When you log in to Procorem, you'll see your **WorkCenter(s)** in the left nav panel.
- 3 To view all your **WorkCenters**, click on **Go To Account**.
- 4 If you don't have access to a needed **WorkCenter**, contact the **Agency** directly to request access.





Files



Posts



Tasks



Calendar



Activity



Links



Tenant Event Portal

Files

Each deal will have file structures unique to their funding layers and construction requirements. When submitting a document for a task, the corresponding file should be stored in the folder with the label of the Task Group for that task.





Files



Posts



Tasks



Calendar



Activity



Links



Tenant Event Portal

Posts

Communicate with your Development Officer and Design & Construction Specialists directly through Procorem using the Posts feature.





Files



Posts



Tasks



Calendar



Activity



Links



Tenant Event Portal

Tasks

A Procorem workcenter may be built to remind users of upcoming deadlines and reminders of past due deadlines with built-in tasks.

When submitting a document for a task, the file path where the item should be stored will be named to match the Task Group.

You can mark tasks as completed;
RIHousing staff may approve tasks.





Files



Posts



Tasks



Calendar



Activity



Links



Tenant Event Portal

Calendar

Tasks with dates assigned to them will be reflected on the calendar in a workcenter.

The beginning date of the task, end date of the task, and all dates in between will be highlighted.





Files



Posts



Tasks



Calendar



Activity



Links



Tenant Event Portal

Activity

Shows you what you may have missed. Entries are logged for each task completed, file uploaded, file downloaded, etc.

Your e-mail notifications should look similar to what you see in the Activity section of Procorem.





Files



Posts



Tasks



Calendar



Activity



Links



Tenant Event Portal

Links

Not applicable to all workcenters. If there is only one workcenter for a deal, it will not have any links.

Remember, some sites have both an Underwriting workcenter and a Design & Construction workcenter; those will be linked.

Permission settings and the completed Procorem User Authorization form will determine whether you have access to any linked workcenters.





Files



Posts



Tasks



Calendar



Activity



Links



Tenant Event Portal

Tenant Event Portal

Available only in Compliance workcenters, this portal is where tenant events must be uploaded by the 10th of each month.

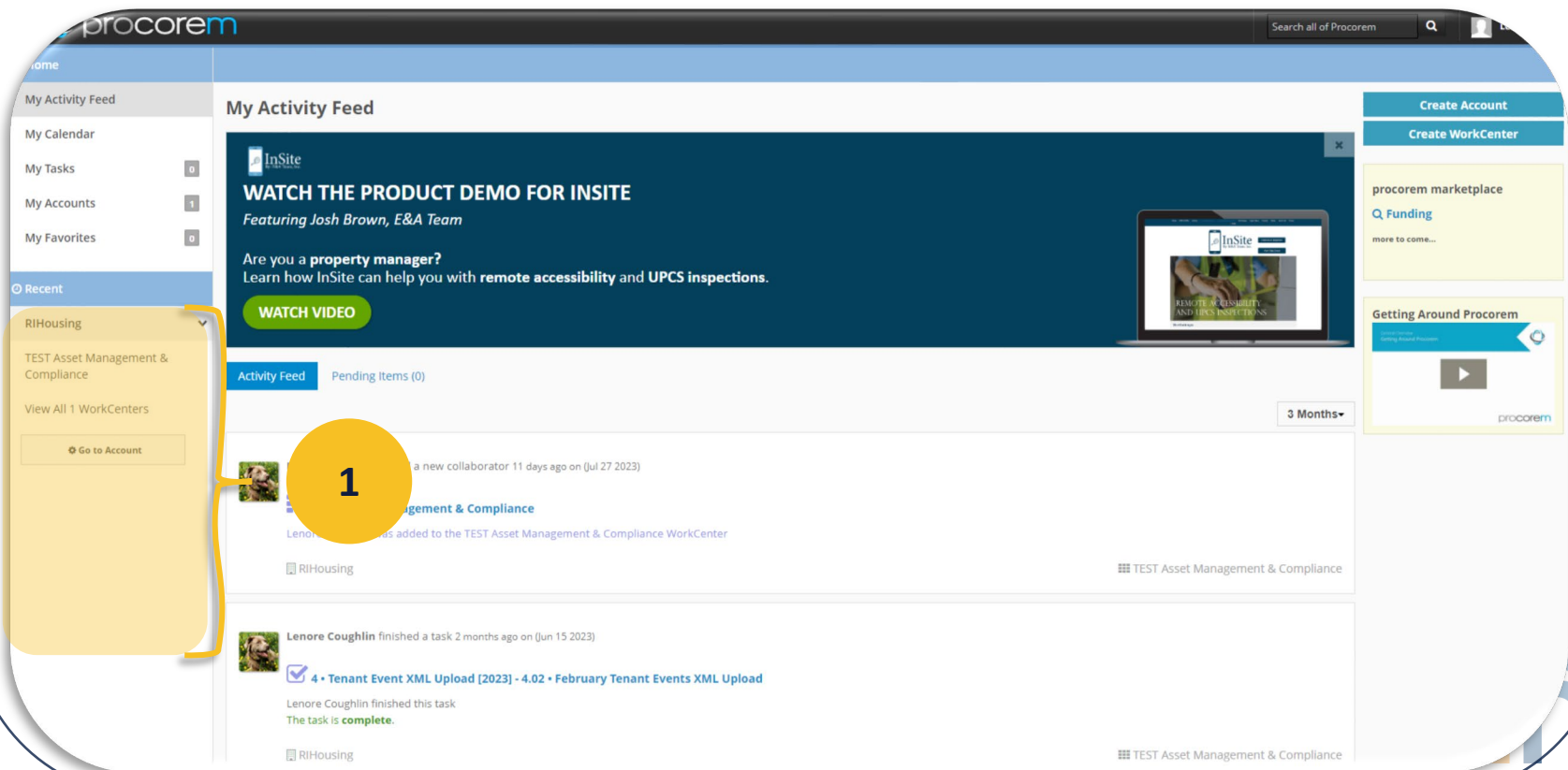
ProLink will be sponsoring their annual [Tenant Portal](#) training on January 25th.



Accessing the Workcenter

1

Log into Procorem and select the desired workcenter.



The screenshot displays the Procorem web application interface. On the left, a sidebar contains navigation options: 'My Activity Feed', 'My Calendar', 'My Tasks', 'My Accounts', 'My Favorites', and 'Recent'. A yellow callout box highlights the 'Go to Account' button in the 'Recent' section. The main content area is titled 'My Activity Feed' and features a large banner for 'WATCH THE PRODUCT DEMO FOR INSITE' with a 'WATCH VIDEO' button. Below the banner, the activity feed shows two entries: one for adding a new collaborator and another for a completed task '4 • Tenant Event XML Upload [2023] - 4.02 • February Tenant Events XML Upload'. The right sidebar includes 'Create Account', 'Create WorkCenter', 'procorem marketplace', 'Funding', and 'Getting Around Procorem'.



Files





Files

Upload any file type instantly. Easily upload multiple documents at the same time up to 2 GB at once.

Commenting

Collaborate on files right within Procorem by commenting on the file record. All comments are integrated with your email to ensure your team stays on task.

Versioning

All versions of files are stored and recorded in Procorem. If you would like to restore or delete an old version of a file, users with the right access can do it with the push of a button.

File Activity

All file activities such as downloading, uploading, commenting, deleting, moving, copying and more are fully recorded in Procorem so you have a complete audit history of all activity.



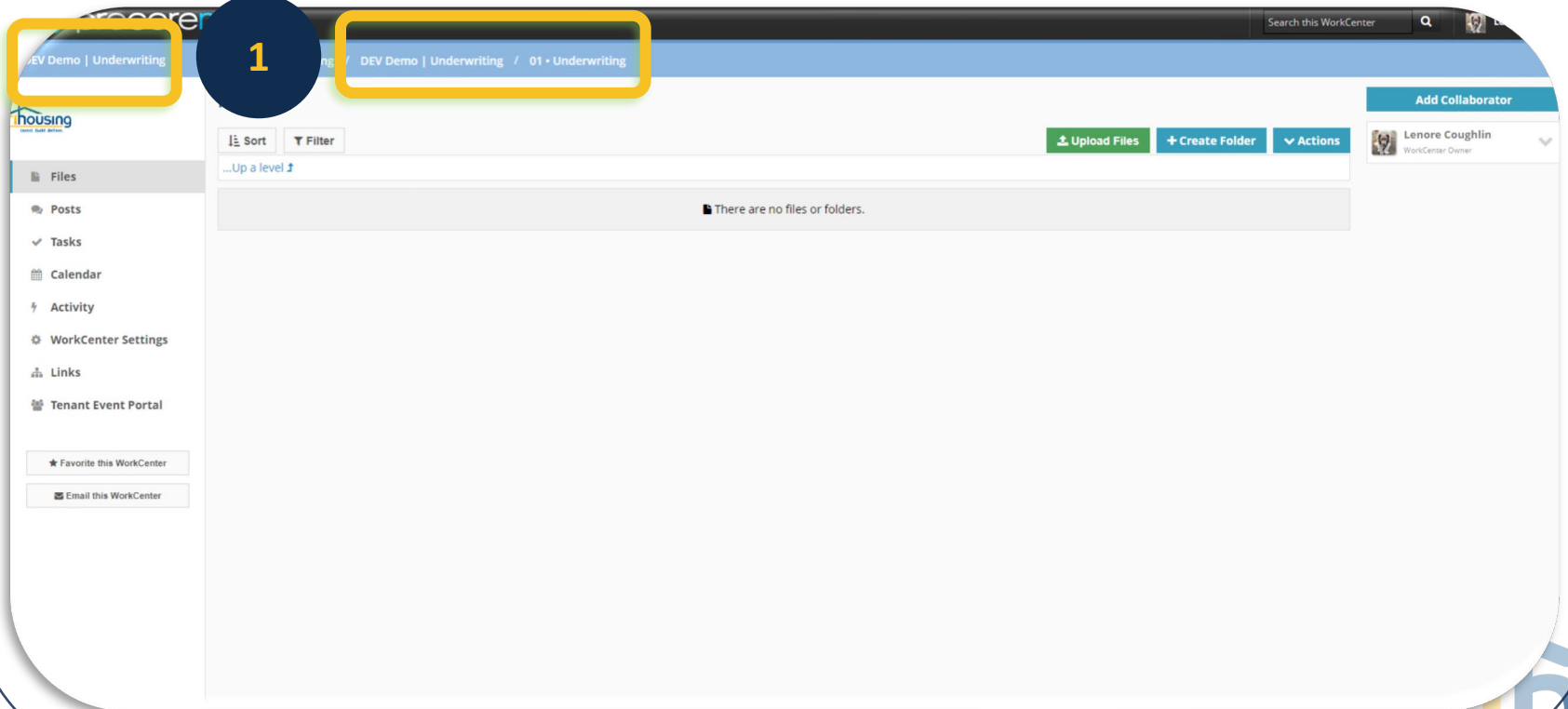


Uploading Files

1

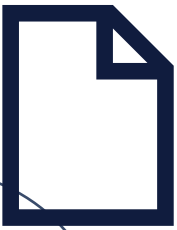
Navigate to the workcenter where you would like to upload file(s).

1



The screenshot displays the Procurement WorkCenter interface. The breadcrumb navigation path is "DEV Demo | Underwriting / DEV Demo | Underwriting / 01 - Underwriting". The "01 - Underwriting" breadcrumb is highlighted with a yellow box. A large blue circle with the number "1" is positioned over the breadcrumb area. The main content area shows a message: "There are no files or folders." The interface includes a sidebar with navigation options like Files, Posts, Tasks, Calendar, Activity, WorkCenter Settings, Links, and Tenant Event Portal. At the top right, there are buttons for "Upload Files", "Create Folder", and "Actions". A user profile for "Lenore Coughlin" is visible in the top right corner.

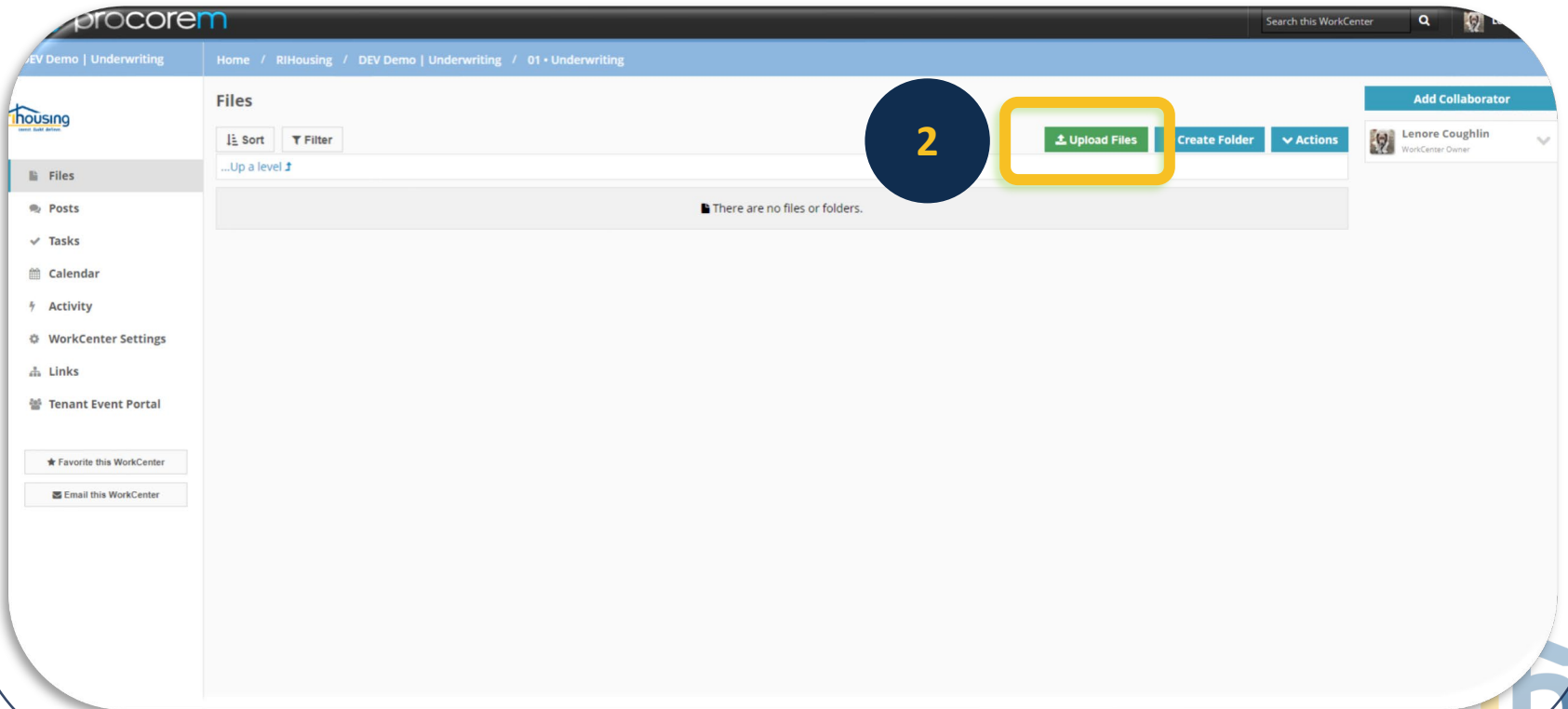




Uploading Files

2

Select Upload Files



The screenshot shows the Procorem web interface. The breadcrumb trail is: Home / RIHousing / DEV Demo | Underwriting / 01 • Underwriting. The main content area is titled 'Files' and contains a message: 'There are no files or folders.' The 'Upload Files' button is highlighted with a yellow box, and a dark blue circle with the number '2' is overlaid on it. The interface also includes a sidebar with navigation options like 'Files', 'Posts', 'Tasks', 'Calendar', 'Activity', 'WorkCenter Settings', 'Links', and 'Tenant Event Portal'. At the bottom right, there is a 'Collaborator' section for 'Lenore Coughlin'.

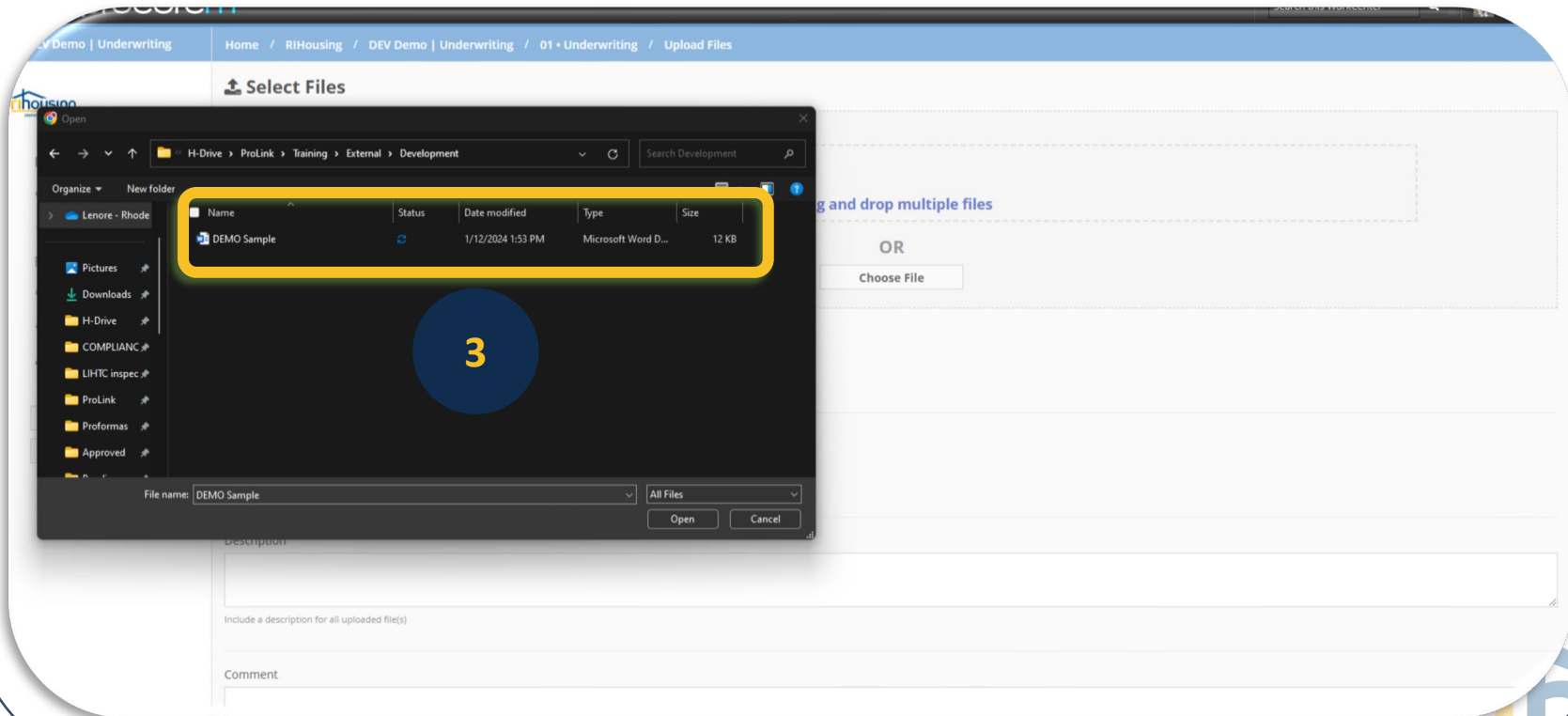




Uploading Files

3

Drag and Drop or click **Choose File**. Both options will require you to select the files to be uploaded from your computer.



The screenshot shows a web application interface for uploading files. The browser address bar shows the path: Home / RHousing / DEV Demo | Underwriting / 01 • Underwriting / Upload Files. The page title is "Select Files". The main content area has a dashed box for "Drag and drop multiple files" and a "Choose File" button. A Windows File Explorer window is open over the page, showing the path: H-Drive > ProLink > Training > External > Development. The file list contains one entry: "DEMO Sample" (Microsoft Word Document, 12 KB, modified 1/12/2024 1:53 PM). A yellow box highlights the file name, status, date modified, type, and size columns. A blue circle with the number "3" is overlaid on the File Explorer window. Below the "Choose File" button, there are fields for "Description" and "Comment".

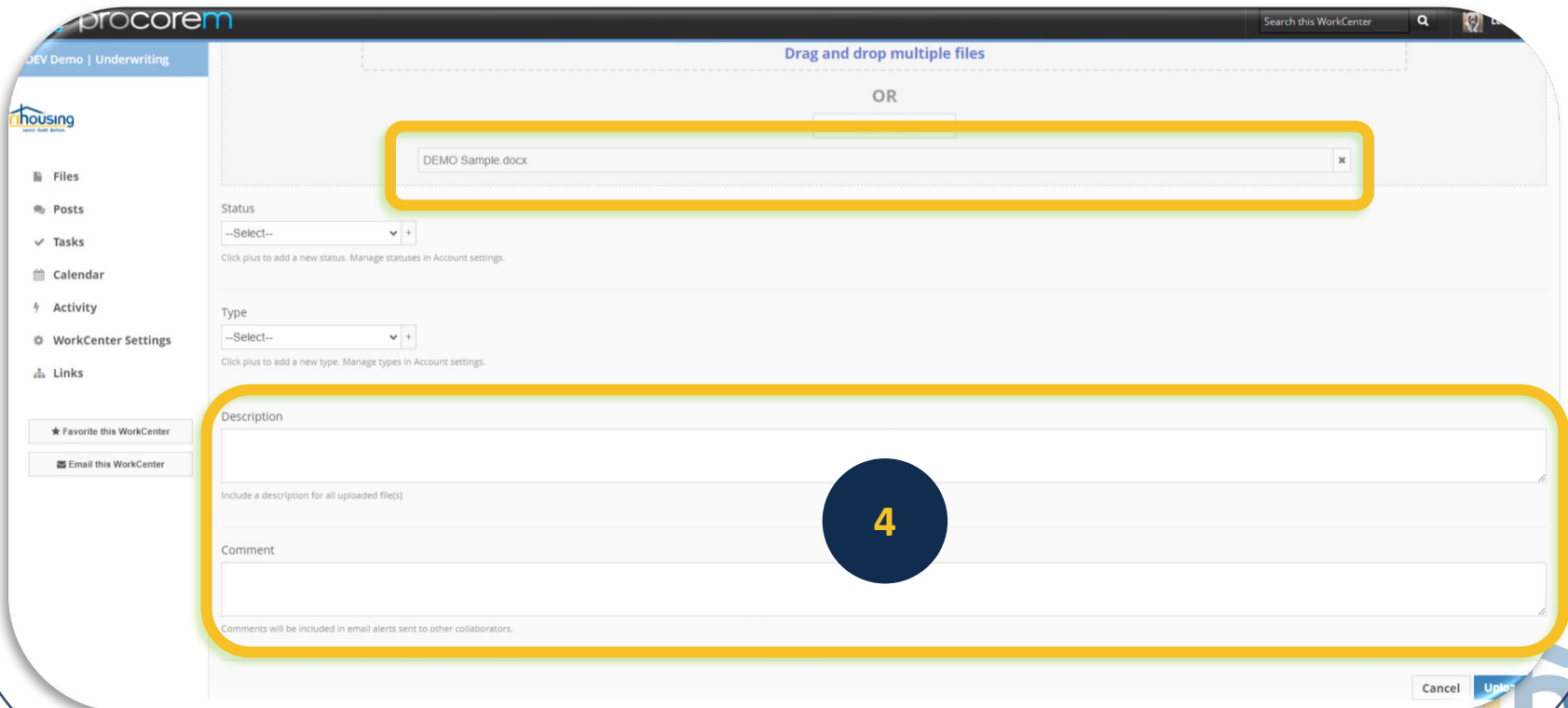
3



Uploading Files

4

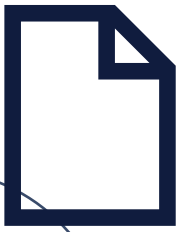
After your selection has been added to the list of files, you have the option to enter a Description and/or Comment.



The screenshot shows the Procorem file upload interface. At the top, there is a search bar and a user profile icon. Below that, a dashed box contains the text "Drag and drop multiple files" and "OR". A file named "DEMO Sample.docx" is listed in a table with a close button (X) on the right. Below the file list, there are two dropdown menus: "Status" and "Type", both currently set to "--Select--". Below these are two text input fields: "Description" and "Comment". The "Description" field has a placeholder text: "Include a description for all uploaded file(s)". The "Comment" field has a placeholder text: "Comments will be included in email alerts sent to other collaborators." At the bottom right, there are "Cancel" and "Upload" buttons. A large blue circle with the number "4" is overlaid on the "Description" and "Comment" fields.

4

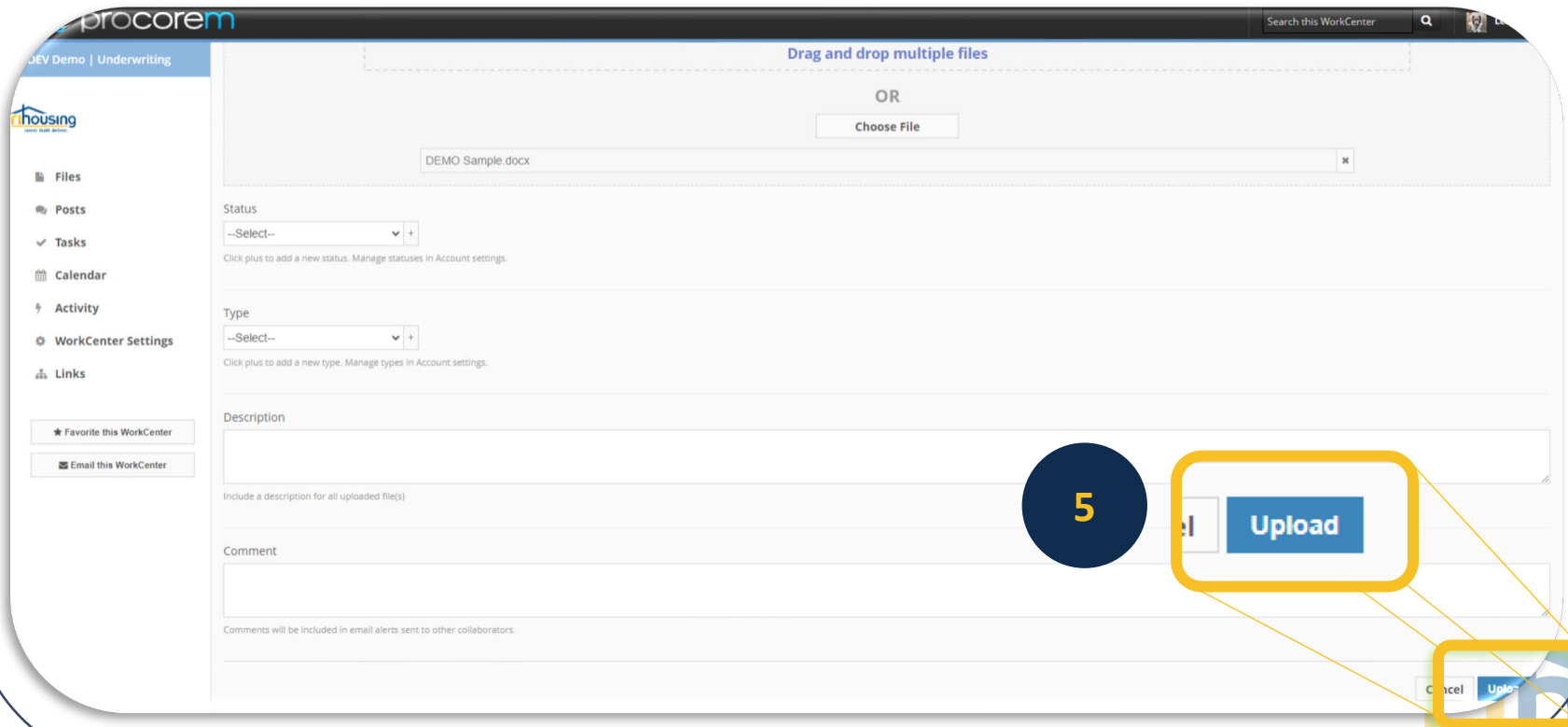
Cancel Upload



Uploading Files

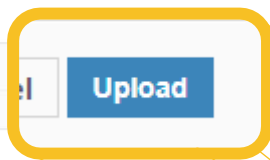
5

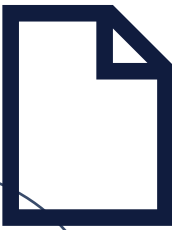
Click **Upload** to complete the process.



The screenshot shows the Procorem file upload interface. At the top, there is a search bar and a user profile icon. Below that, a dashed box contains the text "Drag and drop multiple files" and "OR Choose File". A file named "DEMO Sample.docx" is shown in a list with a close button. Below the file list, there are dropdown menus for "Status" and "Type", both currently set to "--Select--". There are also buttons for "Favorite this WorkCenter" and "Email this WorkCenter". The "Description" field has a placeholder text: "Include a description for all uploaded file(s)". The "Comment" field has a placeholder text: "Comments will be included in email alerts sent to other collaborators." At the bottom right, there are "Cancel" and "Upload" buttons. A yellow circle with the number "5" is placed over the "Upload" button, and a yellow box highlights the "Upload" button. A yellow box also highlights the "Cancel" and "Upload" buttons at the bottom right.

5

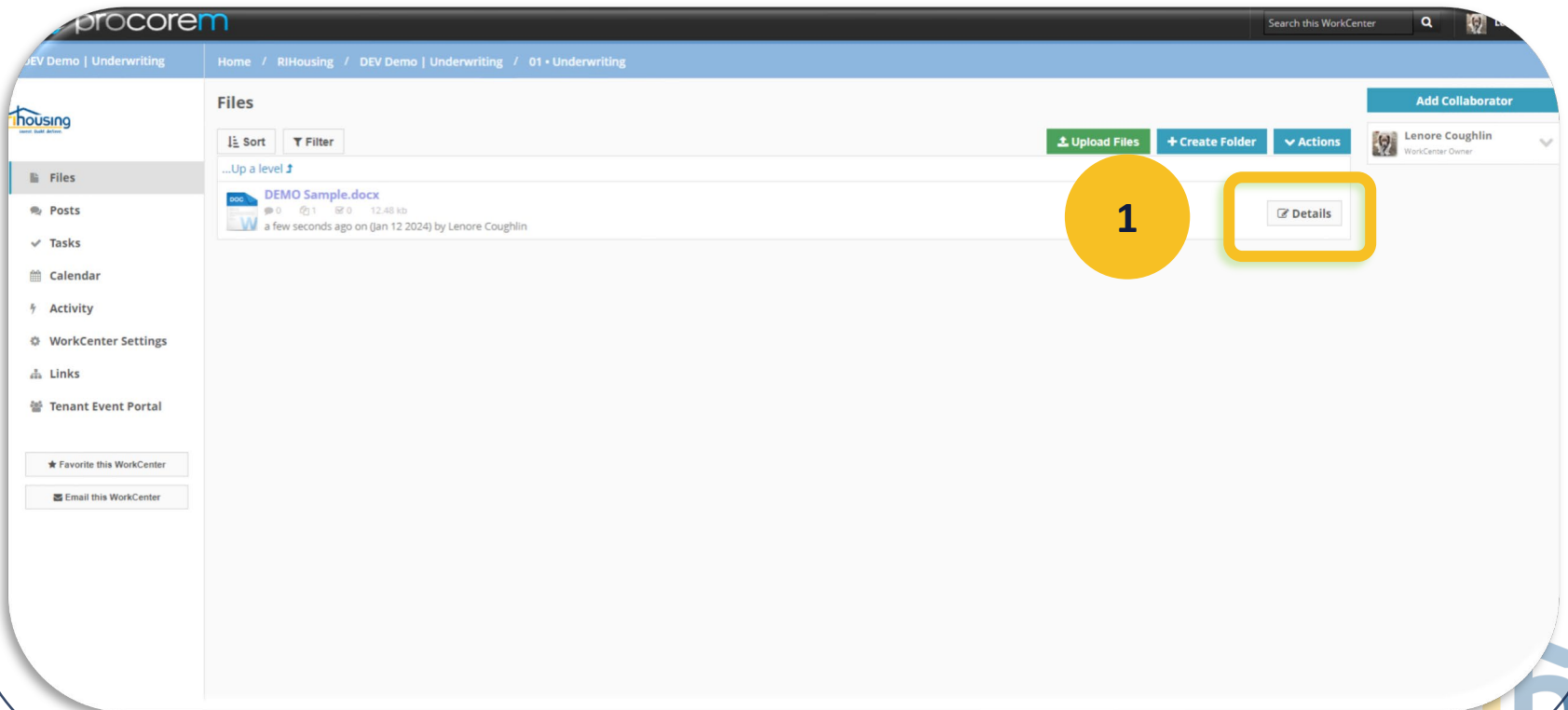




Upload New Versions of Files

1

Find the original file in the workcenter. Click on **Details**.



The screenshot displays the Procorem web interface. The top navigation bar includes the Procorem logo, a search bar, and user information. The main content area is titled 'Files' and shows a list of files. A file named 'DEMO Sample.docx' is highlighted, with a yellow circle containing the number '1' next to it. A yellow box highlights the 'Details' button for this file. The interface also shows options for 'Upload Files', 'Create Folder', and 'Actions' at the top right, and a sidebar with navigation links on the left.

1

Details

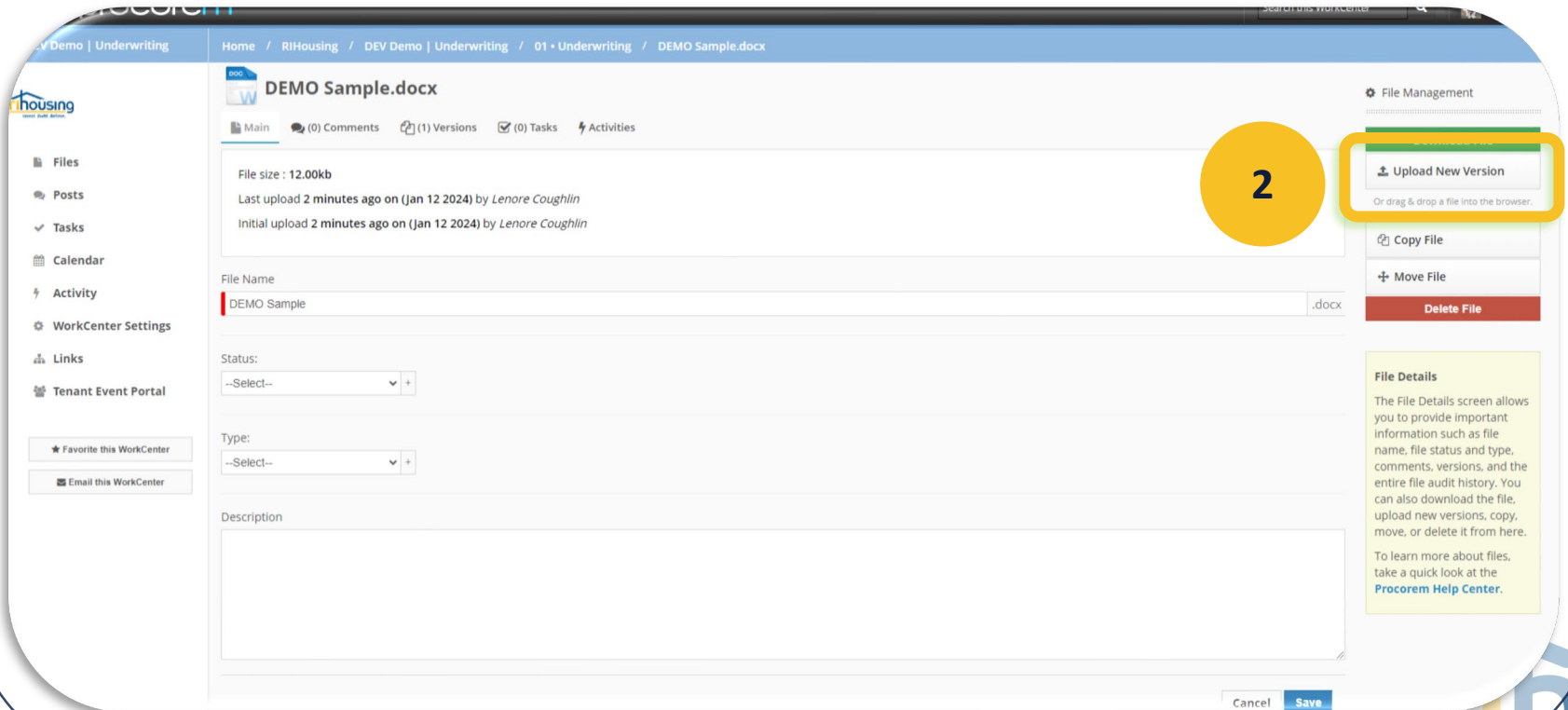




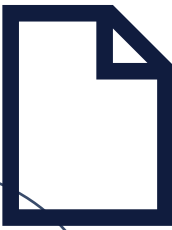
Upload New Versions of Files

2

Select Upload New Version.



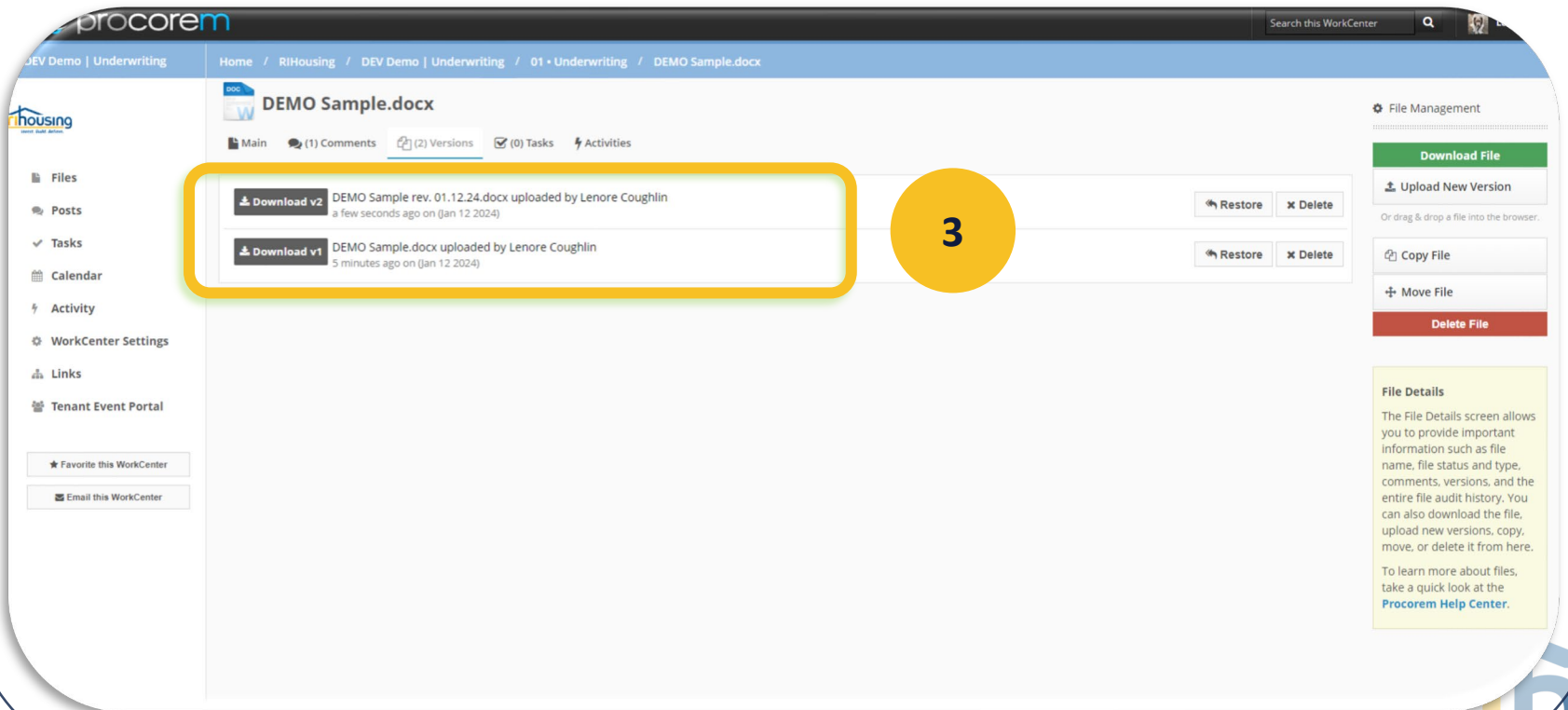
The screenshot displays the Procorem file management interface for a file named "DEMO Sample.docx". The interface includes a left sidebar with navigation options like "Files", "Posts", "Tasks", "Calendar", "Activity", "WorkCenter Settings", "Links", and "Tenant Event Portal". The main content area shows file details: "File size: 12.00kb", "Last upload 2 minutes ago on (Jan 12 2024) by Lenore Coughlin", and "Initial upload 2 minutes ago on (Jan 12 2024) by Lenore Coughlin". Below this, there are fields for "File Name" (DEMO Sample.docx), "Status" (dropdown menu), and "Type" (dropdown menu). A "Description" field is also present. On the right side, a "File Management" panel contains several actions: "Upload New Version" (highlighted with a yellow circle and a '2' in a yellow circle), "Copy File", "Move File", and "Delete File". A "File Details" section at the bottom right provides information about the file details screen and a link to the Procorem Help Center. At the bottom of the interface, there are "Cancel" and "Save" buttons.



Upload New Versions of Files

3

Select the new version of the file from your computer.



The screenshot displays the Procorem file management interface for a file named "DEMO Sample.docx". The breadcrumb trail is "Home / RIHousing / DEV Demo | Underwriting / 01 • Underwriting / DEMO Sample.docx". The file is currently in the "Versions" tab, showing two versions:

- Download v2**: DEMO Sample rev. 01.12.24.docx uploaded by Lenore Coughlin a few seconds ago on (Jan 12 2024)
- Download v1**: DEMO Sample.docx uploaded by Lenore Coughlin 5 minutes ago on (Jan 12 2024)

The "v2" version is highlighted with a yellow box, and a yellow circle with the number "3" is placed next to it, indicating the step to select the new version. The interface includes a left sidebar with navigation options like Files, Posts, Tasks, Calendar, Activity, WorkCenter Settings, Links, and Tenant Event Portal. On the right, there are buttons for "Download File", "Upload New Version", "Copy File", "Move File", and "Delete File". A "File Details" section at the bottom right explains the functionality of the File Details screen.

File Management

- Download File
- Upload New Version
- Copy File
- Move File
- Delete File

File Details

The File Details screen allows you to provide important information such as file name, file status and type, comments, versions, and the entire file audit history. You can also download the file, upload new versions, copy, move, or delete it from here.

To learn more about files, take a quick look at the [Procorem Help Center](#).

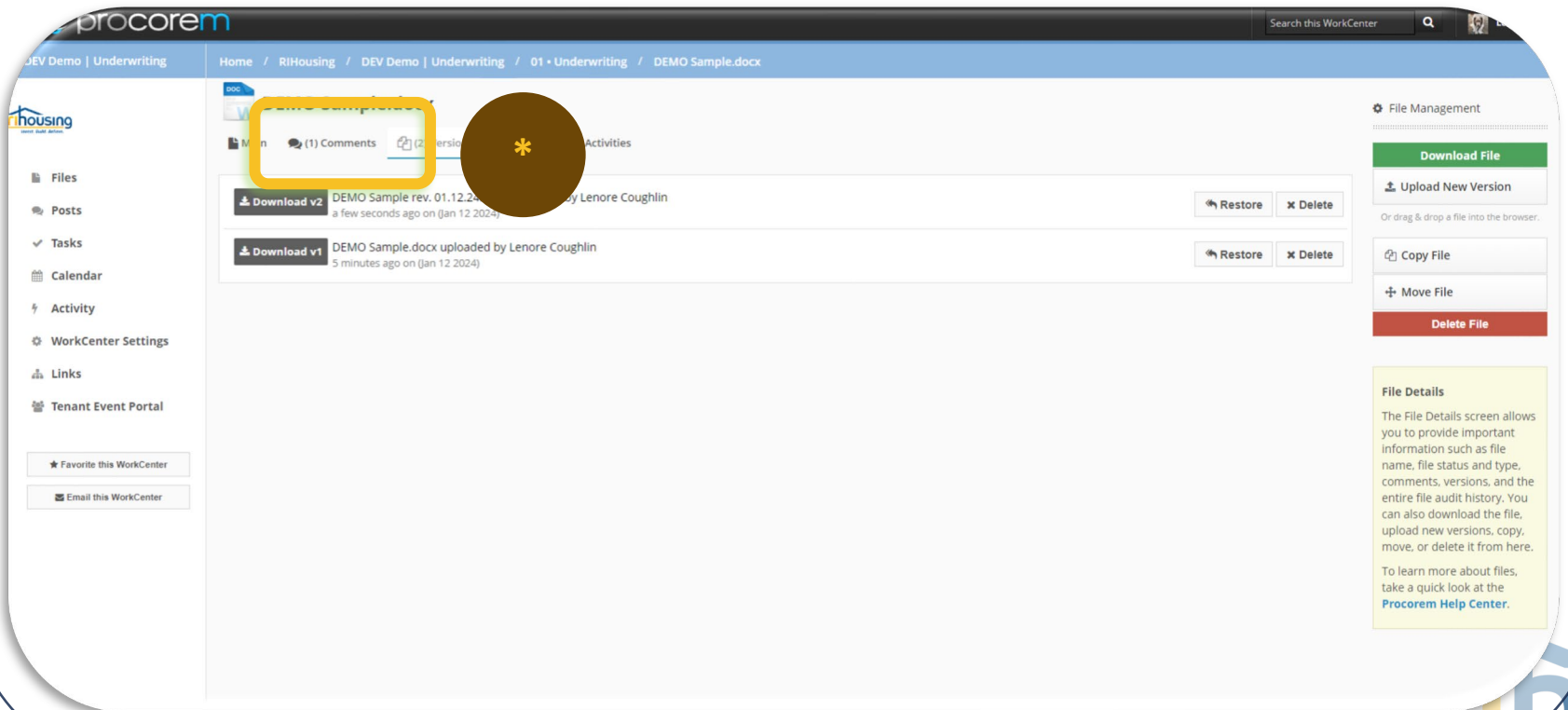
3



File Comments



When a file version is added, Procorem creates a Comment to identify the user who uploaded it.



The screenshot displays the Procorem interface for file management. The breadcrumb trail is: Home / RIHousing / DEV Demo | Underwriting / 01 • Underwriting / DEMO Sample.docx. The left sidebar contains navigation options: Files, Posts, Tasks, Calendar, Activity, WorkCenter Settings, Links, and Tenant Event Portal. The main content area shows a file named 'DEMO Sample.docx' with a comment icon and '(1) Comments'. A yellow box highlights the comment icon and the '(1) Comments' text. A brown circle with a yellow asterisk is placed over the comment icon. Below the file name, there are two file versions listed:

- Download v2**: DEMO Sample rev. 01.12.2024 uploaded by Lenore Coughlin a few seconds ago on (Jan 12 2024). Buttons: Restore, Delete.
- Download v1**: DEMO Sample.docx uploaded by Lenore Coughlin 5 minutes ago on (Jan 12 2024). Buttons: Restore, Delete.

The right sidebar contains 'File Management' options: Download File, Upload New Version, Copy File, Move File, and Delete File. Below this is a 'File Details' section with the following text:

File Details
The File Details screen allows you to provide important information such as file name, file status and type, comments, versions, and the entire file audit history. You can also download the file, upload new versions, copy, move, or delete it from here.
To learn more about files, take a quick look at the [Procorem Help Center](#).

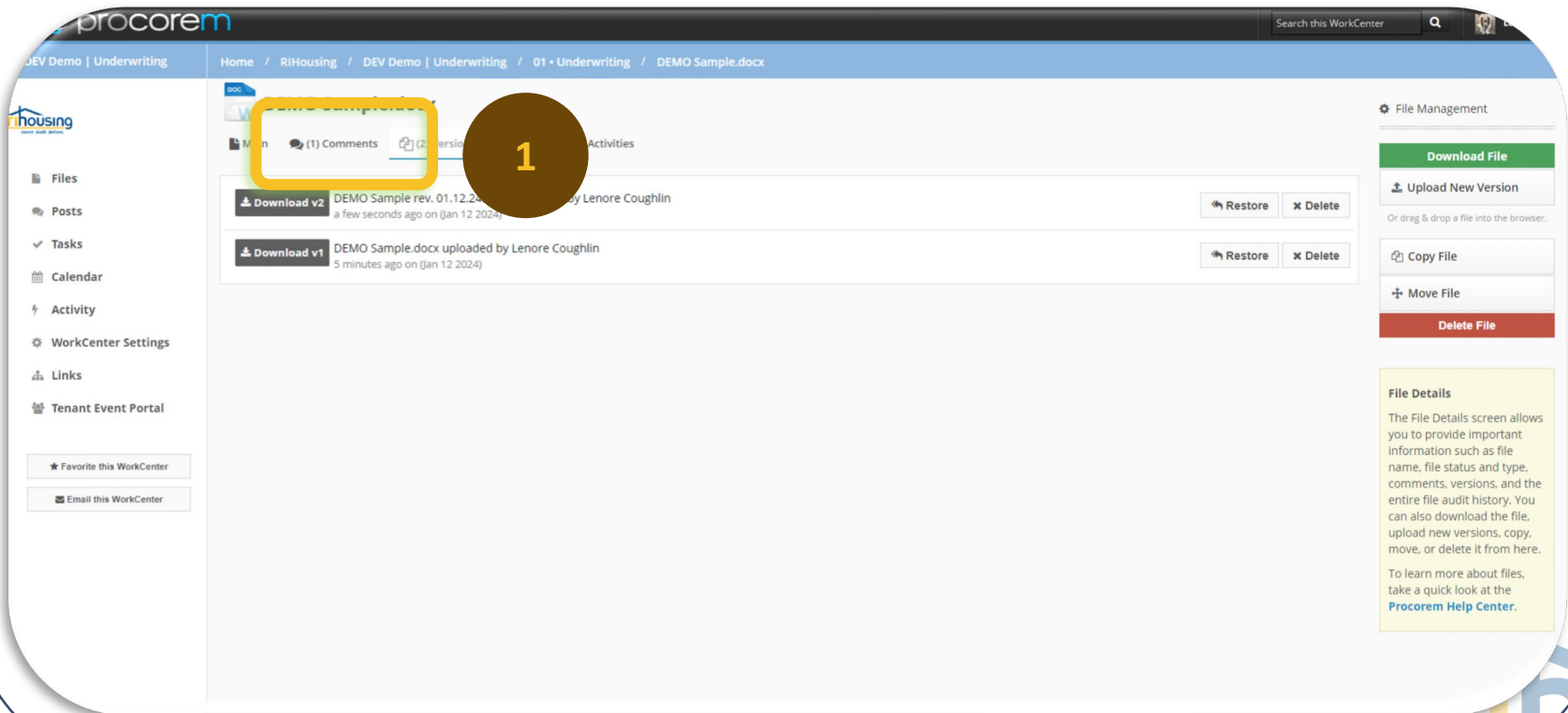




File Comments

1

To add your own comment on a file within a workcenter, select the file and click on the **Comments** tab.



The screenshot displays the Procorem interface for a workcenter. The breadcrumb trail is: Home / RIHousing / DEV Demo | Underwriting / 01 • Underwriting / DEMO Sample.docx. The left sidebar contains navigation options: Files, Posts, Tasks, Calendar, Activity, WorkCenter Settings, Links, and Tenant Event Portal. The main content area shows a file named 'DEMO Sample.docx' with a yellow box highlighting the '(1) Comments' tab. A brown circle with the number '1' is placed over the 'Comments' tab. Below the file name, two versions are listed: 'DEMO Sample rev. 01.12.2024' and 'DEMO Sample.docx uploaded by Lenore Coughlin'. Each version has 'Download' and 'Delete' buttons. The right sidebar contains 'File Management' options: Download File, Upload New Version, Copy File, Move File, and Delete File. A 'File Details' section at the bottom right explains the file details screen.

File Management

- Download File
- Upload New Version
- Copy File
- Move File
- Delete File

File Details

The File Details screen allows you to provide important information such as file name, file status and type, comments, versions, and the entire file audit history. You can also download the file, upload new versions, copy, move, or delete it from here.

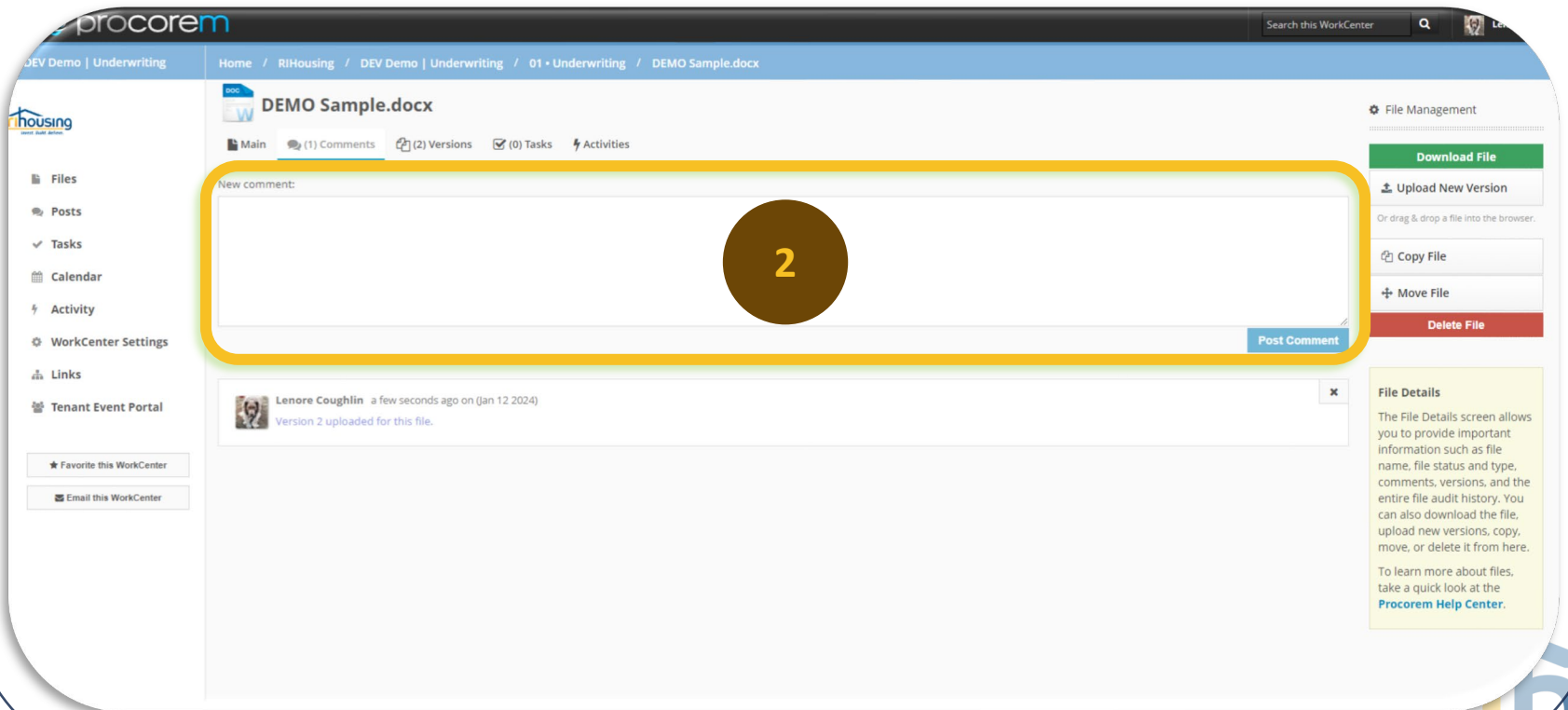
To learn more about files, take a quick look at the [Procorem Help Center](#).



File Comments

2

Enter your comment and click **Post Comment** to add it to the file.



The screenshot displays the Procorem File Management interface for a file named "DEMO Sample.docx". The breadcrumb trail is "Home / RIHousing / DEV Demo | Underwriting / 01 • Underwriting / DEMO Sample.docx". The interface includes a left sidebar with navigation options like "Files", "Posts", "Tasks", "Calendar", "Activity", "WorkCenter Settings", "Links", and "Tenant Event Portal". The main content area shows the file name "DEMO Sample.docx" and navigation tabs for "Main", "(1) Comments", "(2) Versions", "(0) Tasks", and "Activities". A large text input field for "New comment:" is highlighted with a yellow border and contains a large brown circle with the number "2". A "Post Comment" button is located at the bottom right of this field. Below the input field, a notification from "Lenore Coughlin" states "Version 2 uploaded for this file." On the right side, there is a "File Management" section with buttons for "Download File", "Upload New Version", "Copy File", "Move File", and "Delete File". A "File Details" section provides information about the file and a link to the "Procorem Help Center".

2





Tasks





Task Filtering Easily sort your tasks by custom group, task status, who the task is assigned to, and when the task is due.

Assignees Tasks are assigned to a single user or multiple users.

Approvals Task completion requires the approval of RIHousing. Task approval may be revoked and the task re-opened at the discretion of RIHousing if a task is found to be incomplete.

Followers Those on the project that are not assignees or approvers may be identified as Followers to stay informed through email notifications as the task status progresses.





Task Notifications All tasks are fully integrated with email notifications. This ensures your team is kept up to speed as tasks are completed or as they fall behind.

Task Management Tasks can be managed on a project-by-project basis or easily viewed across all projects in a single screen.

Task Statuses Tasks progress through a variety of statuses depending on the information you have put in the task.

My Tasks Every user can see which tasks are associated to them across all the projects in a single view.

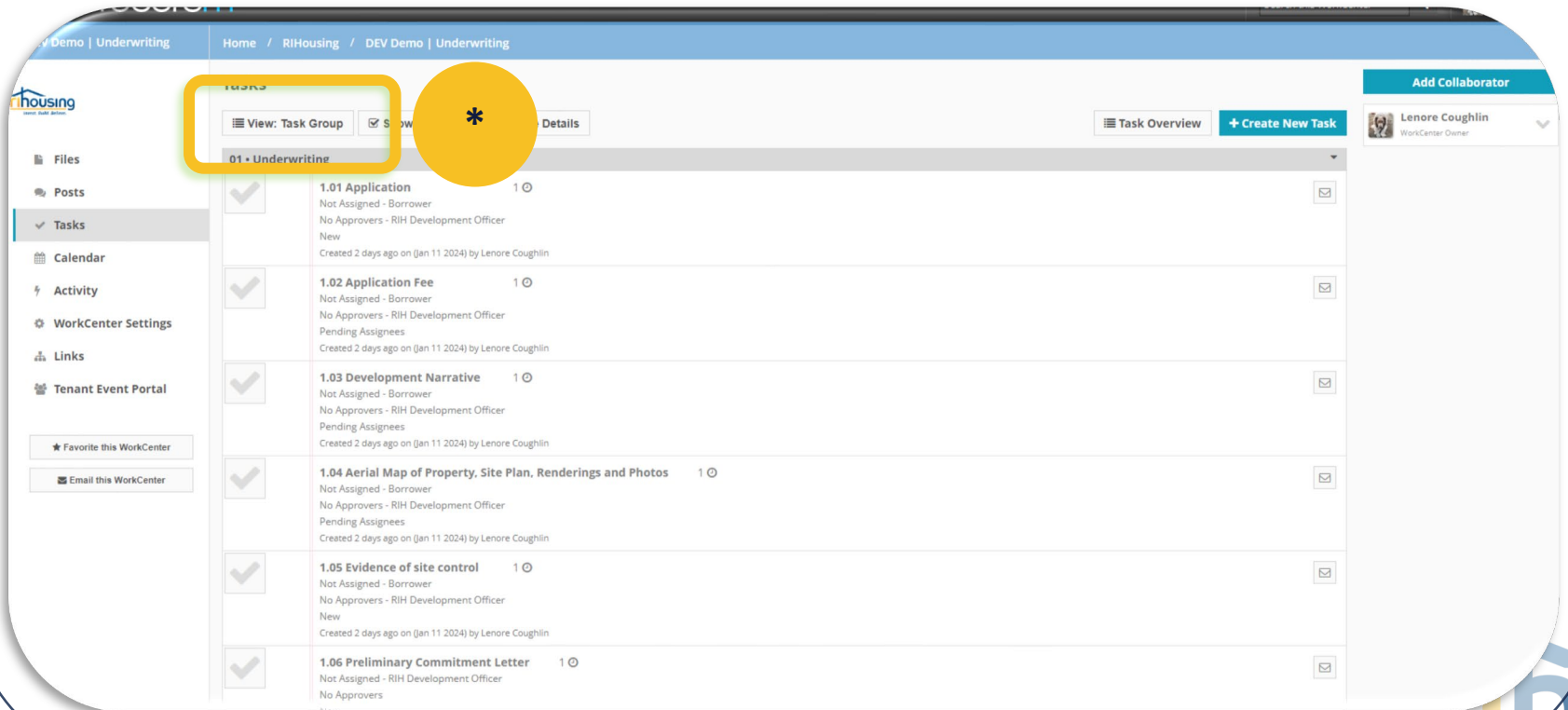




Task Grouping



The default grouping is by Task Group, or the heading in the grey table headings. These group labels match the folder labels in Files.



The screenshot displays the Procorem interface for a WorkCenter. The left sidebar contains navigation options: Files, Posts, Tasks (selected), Calendar, Activity, WorkCenter Settings, Links, and Tenant Event Portal. The main content area shows a list of tasks under the heading "01 - Underwriting". A yellow box highlights the "View: Task Group" button in the top navigation bar. A yellow circle with an asterisk highlights the "01 - Underwriting" heading in the table. The tasks listed are:

Task Group	Task Name	Status	Created By
01 - Underwriting	1.01 Application	Not Assigned - Borrower	Lenore Coughlin
01 - Underwriting	1.02 Application Fee	Not Assigned - Borrower	Lenore Coughlin
01 - Underwriting	1.03 Development Narrative	Not Assigned - Borrower	Lenore Coughlin
01 - Underwriting	1.04 Aerial Map of Property, Site Plan, Renderings and Photos	Not Assigned - Borrower	Lenore Coughlin
01 - Underwriting	1.05 Evidence of site control	Not Assigned - Borrower	Lenore Coughlin
01 - Underwriting	1.06 Preliminary Commitment Letter	Not Assigned - Borrower	Lenore Coughlin

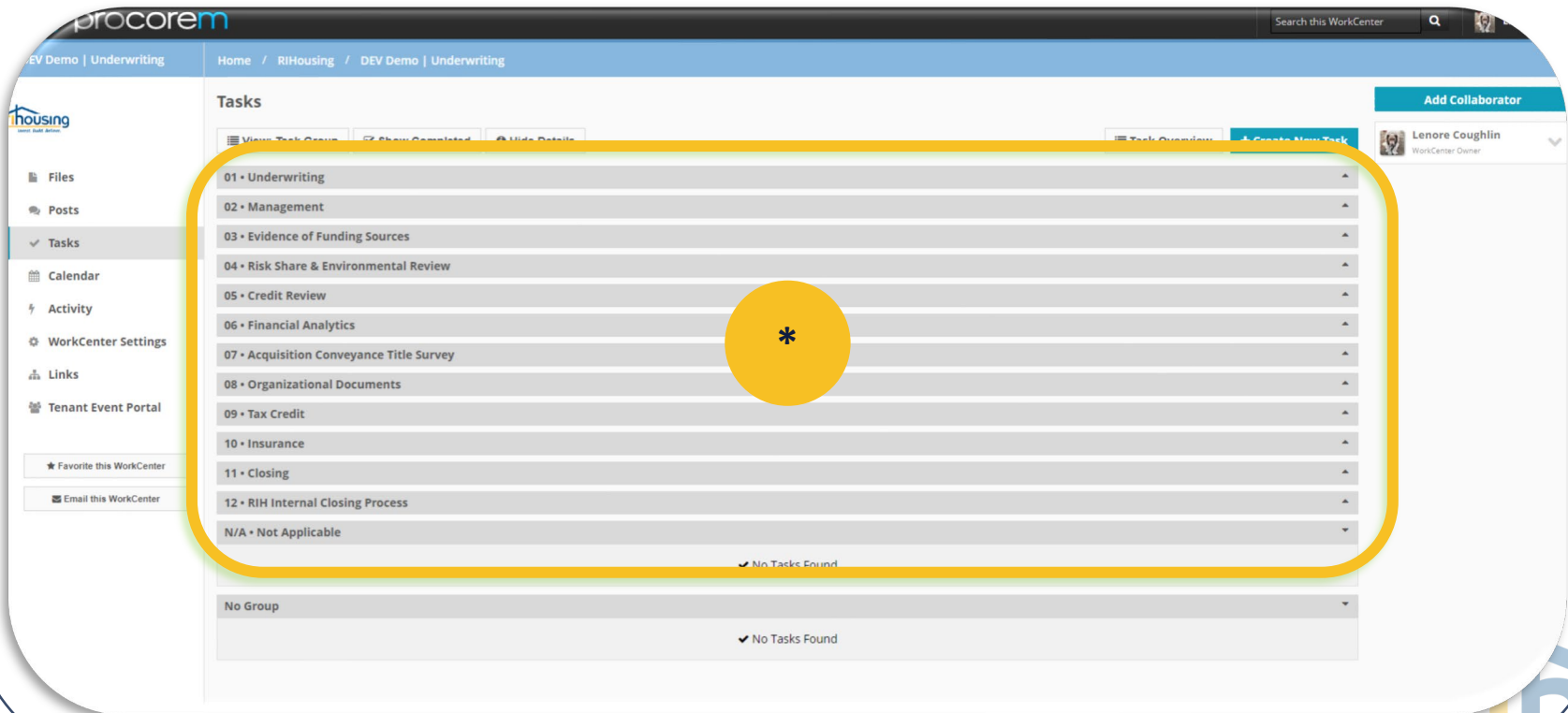




Task Grouping



Tasks Groups are collapsible. Click on a heading to collapse the tasks beneath.



The screenshot displays the Procorem interface for a 'DEV Demo | Underwriting' workcenter. The 'Tasks' section is visible, showing a list of task groups. A yellow box highlights the list, and a yellow circle with an asterisk is placed over the list items. The task groups listed are:

- 01 • Underwriting
- 02 • Management
- 03 • Evidence of Funding Sources
- 04 • Risk Share & Environmental Review
- 05 • Credit Review
- 06 • Financial Analytics
- 07 • Acquisition Conveyance Title Survey
- 08 • Organizational Documents
- 09 • Tax Credit
- 10 • Insurance
- 11 • Closing
- 12 • RIH Internal Closing Process
- N/A • Not Applicable

Below the list, there are two 'No Tasks Found' messages. The interface also includes a sidebar with navigation options like Files, Posts, Tasks, Calendar, Activity, WorkCenter Settings, Links, and Tenant Event Portal. A search bar and a user profile for Lenore Coughlin are visible at the top right.

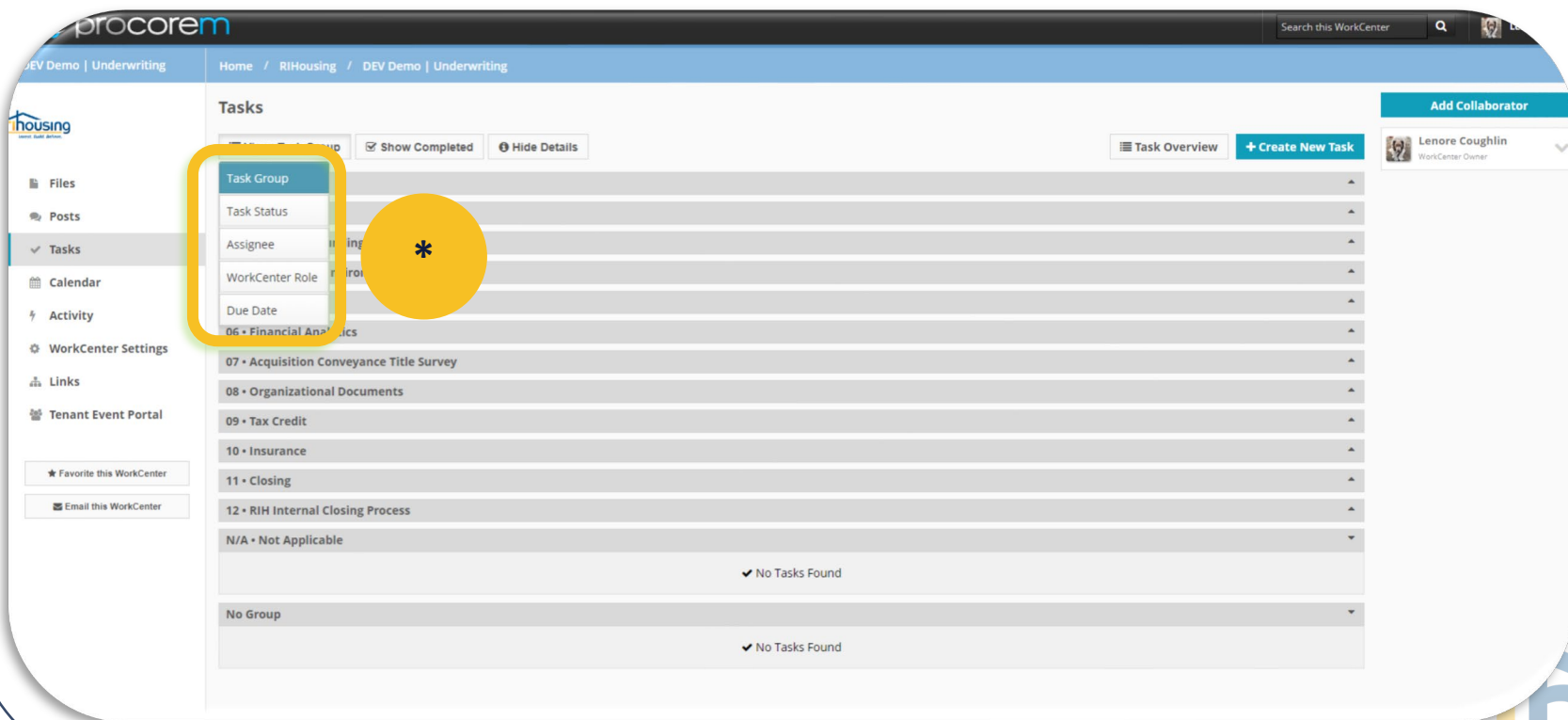




Task Grouping



Tasks Groups are collapsible. Click on a heading to collapse the tasks beneath.



The screenshot displays the Procorem interface for a WorkCenter. The main content area is titled "Tasks" and features a list of task groups. A yellow box highlights the "Task Group" menu, which includes options for "Task Status", "Assignee", "WorkCenter Role", and "Due Date". A yellow circle with an asterisk is placed over the "Assignee" option. The task list includes groups such as "06 • Financial Analytics", "07 • Acquisition Conveyance Title Survey", "08 • Organizational Documents", "09 • Tax Credit", "10 • Insurance", "11 • Closing", and "12 • RIH Internal Closing Process". Each group has a dropdown arrow on the right. Below the list, there are two "No Tasks Found" messages. On the right side, there is a sidebar with a search bar, a "Task Overview" button, a "Create New Task" button, and a "Collaborator" section for Lenore Coughlin.

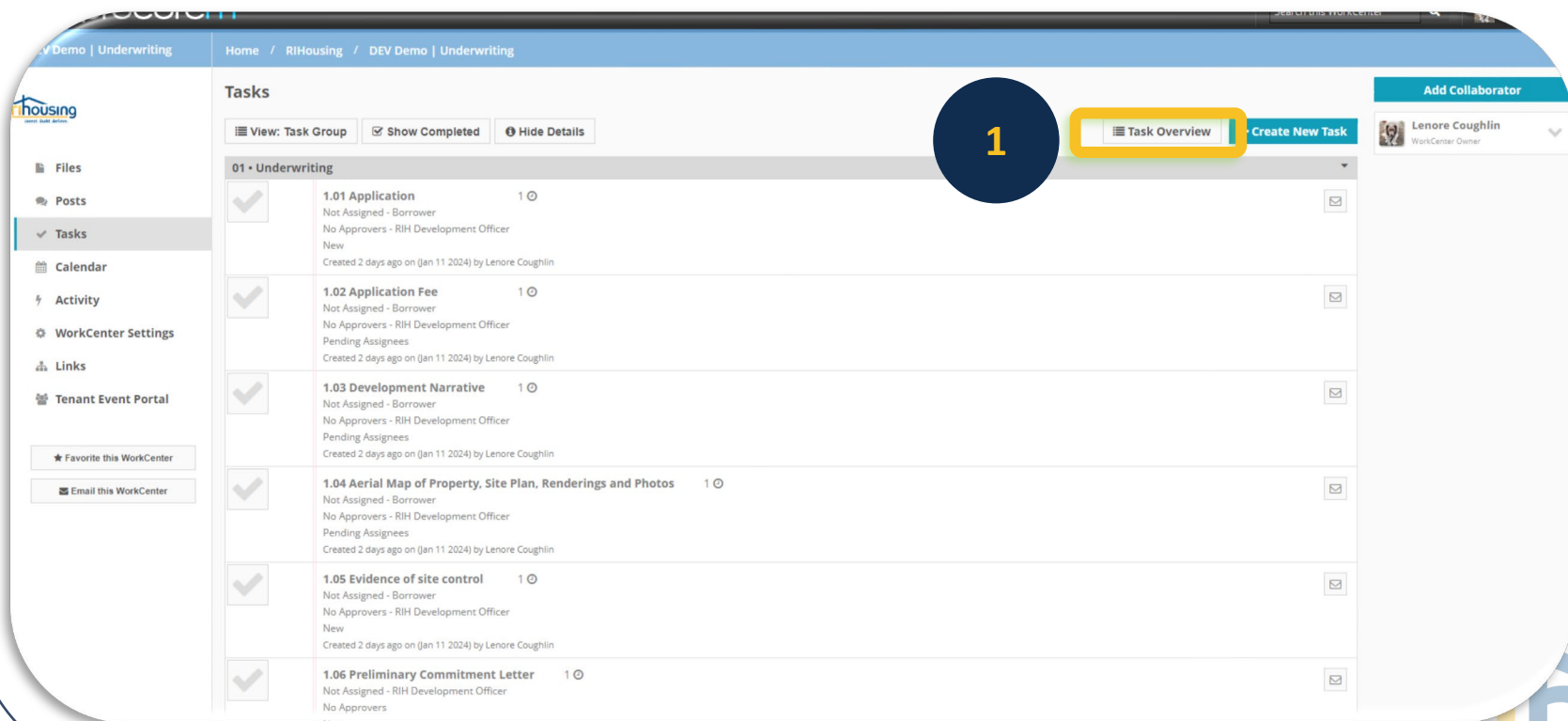




Task Filtering

1

Select **Task Overview** from atop the Task Groups. A report will open in a new browser window where tasks will be grouped to reflect the **View**.



The screenshot shows the Procorem 'Tasks' page. A yellow box highlights the 'Task Overview' button in the top right corner of the task list area, with a blue circle containing the number '1' next to it. The page displays a list of tasks under the group '01 - Underwriting'. The tasks are:

Task ID	Task Name	Status	Created By
1.01	Application	Not Assigned - Borrower	Lenore Coughlin
1.02	Application Fee	Not Assigned - Borrower	Lenore Coughlin
1.03	Development Narrative	Not Assigned - Borrower	Lenore Coughlin
1.04	Aerial Map of Property, Site Plan, Renderings and Photos	Not Assigned - Borrower	Lenore Coughlin
1.05	Evidence of site control	Not Assigned - Borrower	Lenore Coughlin
1.06	Preliminary Commitment Letter	Not Assigned - Borrower	Lenore Coughlin





Task Filtering

2

Use the filters available to work with the tasks in the webpage. Export to Excel (preferred) or PDF if desired.

Task Overview for DEV Demo | Underwriting

Export to Excel Export to PDF

Task Group

Task ↑	Phase	Status	Task Group	Associated Roles	Most Recent Upload	Most Recent Comment
Task Group: 01 • Underwriting						
1.01 Application		New	01 • Underwriting	Borrower, RIH Development Officer		
1.02 Application Fee		Pending Assignees	01 • Underwriting	Borrower, RIH Development Officer		
1.03 Development Narrative		Pending Assignees	01 • Underwriting	Borrower, RIH Development Officer		
1.04 Aerial Map of Property, Site Plan, Renderings and Photos		Pending Assignees	01 • Underwriting	Borrower, RIH Development Officer		
1.05 Evidence of site control		New	01 • Underwriting	Borrower, RIH Development Officer		
1.06 Preliminary Commitment Letter		New	01 • Underwriting	RIH Development Officer		
1.07 RIHousing Appraisal RFQ		Pending Assignees	01 • Underwriting	RIH Development Officer		
1.08 RIHousing Commissioned Appraisal		Pending Assignees	01 • Underwriting	RIH Development Officer		
1.09 RIHousing Commissioned Market Study		Pending Assignees	01 • Underwriting	RIH Development Officer		
1.10 Firm Approval for Credit						

2

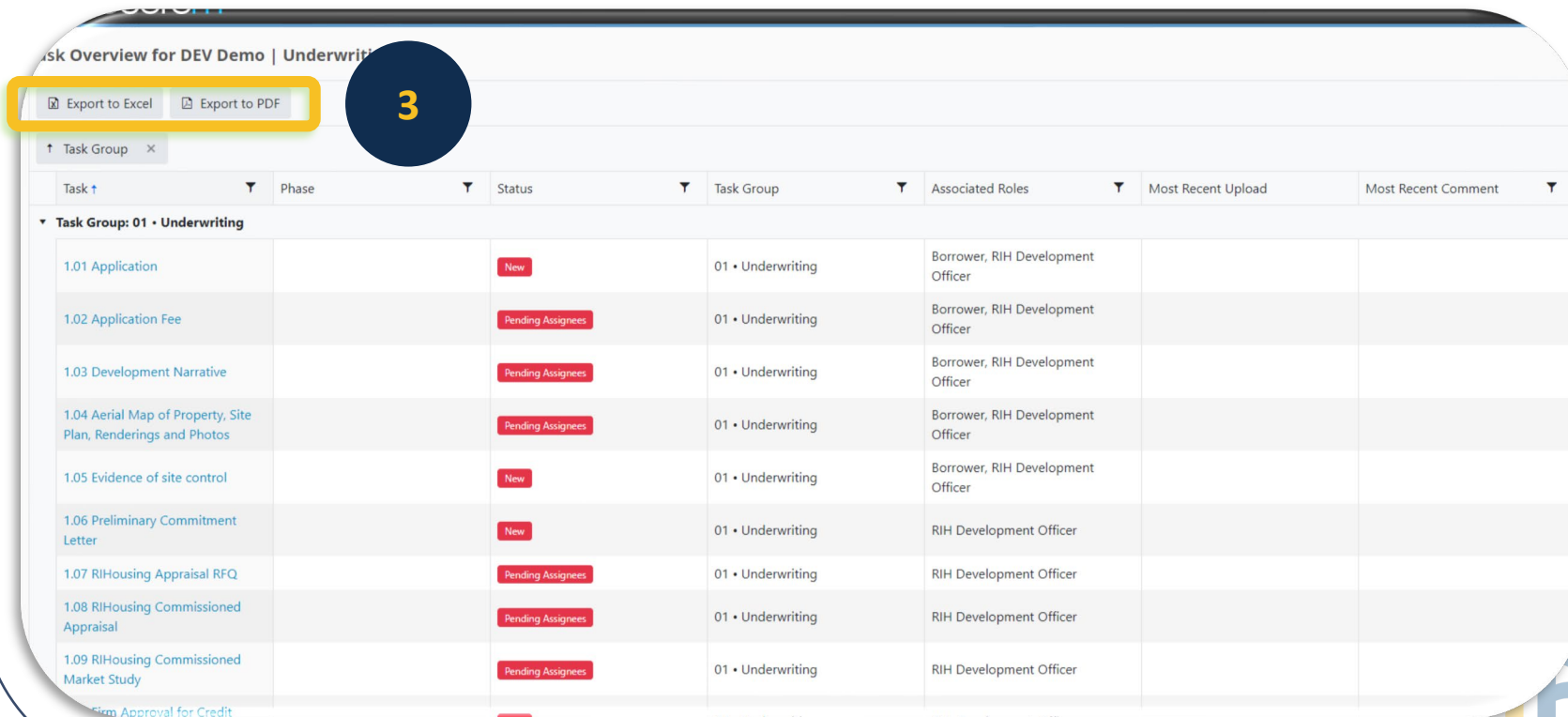




Task Filtering

3

Export to Excel (preferred) or PDF if desired.



The screenshot shows a web interface for task management. At the top, there are two buttons: "Export to Excel" and "Export to PDF", both highlighted with a yellow box and a blue circle containing the number "3". Below the buttons is a "Task Group" filter dropdown set to "01 • Underwriting". The main content is a table with the following columns: Task, Phase, Status, Task Group, Associated Roles, Most Recent Upload, and Most Recent Comment. The table lists several tasks under the "01 • Underwriting" group, with their respective statuses.

Task	Phase	Status	Task Group	Associated Roles	Most Recent Upload	Most Recent Comment
Task Group: 01 • Underwriting						
1.01 Application		New	01 • Underwriting	Borrower, RIH Development Officer		
1.02 Application Fee		Pending Assignees	01 • Underwriting	Borrower, RIH Development Officer		
1.03 Development Narrative		Pending Assignees	01 • Underwriting	Borrower, RIH Development Officer		
1.04 Aerial Map of Property, Site Plan, Renderings and Photos		Pending Assignees	01 • Underwriting	Borrower, RIH Development Officer		
1.05 Evidence of site control		New	01 • Underwriting	Borrower, RIH Development Officer		
1.06 Preliminary Commitment Letter		New	01 • Underwriting	RIH Development Officer		
1.07 RIHousing Appraisal RFQ		Pending Assignees	01 • Underwriting	RIH Development Officer		
1.08 RIHousing Commissioned Appraisal		Pending Assignees	01 • Underwriting	RIH Development Officer		
1.09 RIHousing Commissioned Market Study		Pending Assignees	01 • Underwriting	RIH Development Officer		
1.10 Firm Approval for Credit						

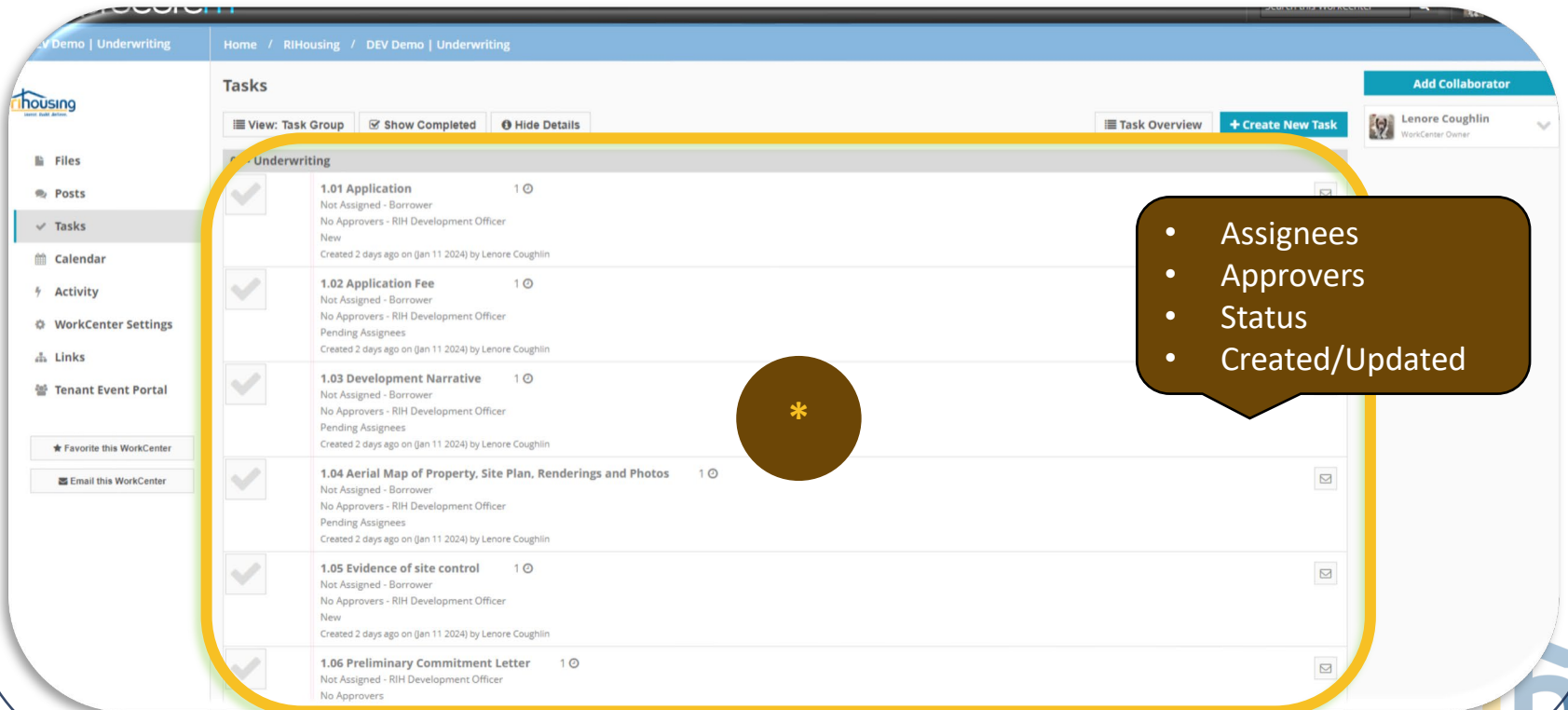




Task Details



Some task details can be seen on the Tasks page.



The screenshot displays the 'Tasks' page in the Procorem application. The page title is 'Tasks' and the breadcrumb is 'Home / RIHousing / DEV Demo | Underwriting'. The left sidebar shows navigation options: Files, Posts, Tasks (selected), Calendar, Activity, WorkCenter Settings, Links, and Tenant Event Portal. The main content area shows a list of tasks under the 'Underwriting' group. The tasks are:

Task ID	Task Name	Status	Assignees	Approvers	Status	Created/Updated
1.01	Application	Not Assigned - Borrower	No Assignees	No Approvers - RIH Development Officer	New	Created 2 days ago on (Jan 11 2024) by Lenore Coughlin
1.02	Application Fee	Not Assigned - Borrower	No Assignees	No Approvers - RIH Development Officer	Pending Assignees	Created 2 days ago on (Jan 11 2024) by Lenore Coughlin
1.03	Development Narrative	Not Assigned - Borrower	No Assignees	No Approvers - RIH Development Officer	Pending Assignees	Created 2 days ago on (Jan 11 2024) by Lenore Coughlin
1.04	Aerial Map of Property, Site Plan, Renderings and Photos	Not Assigned - Borrower	No Assignees	No Approvers - RIH Development Officer	Pending Assignees	Created 2 days ago on (Jan 11 2024) by Lenore Coughlin
1.05	Evidence of site control	Not Assigned - Borrower	No Assignees	No Approvers - RIH Development Officer	New	Created 2 days ago on (Jan 11 2024) by Lenore Coughlin
1.06	Preliminary Commitment Letter	Not Assigned - RIH Development Officer	No Assignees	No Approvers		

A yellow callout box highlights the task details, and a brown callout box lists the visible details:

- Assignees
- Approvers
- Status
- Created/Updated



- Assignees
- Approvers
- Status
- Created/Updated

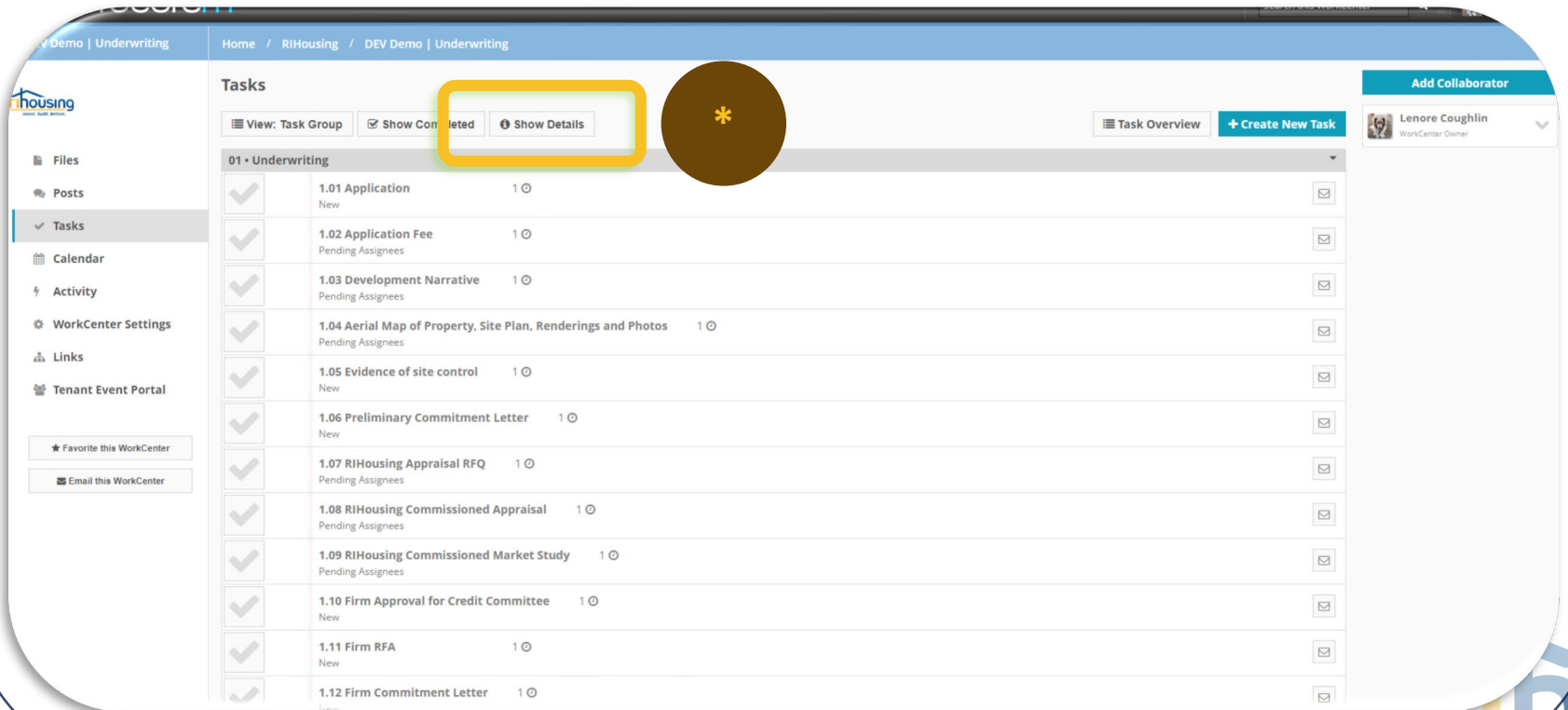




Task Details



Hide Details for a simple, compact list. **Show Details** for more information.



01 • Underwriting

Task ID	Task Name	Status	Count	Actions
1.01	Application New	New	1	📧
1.02	Application Fee	Pending Assignees	1	📧
1.03	Development Narrative	Pending Assignees	1	📧
1.04	Aerial Map of Property, Site Plan, Renderings and Photos	Pending Assignees	1	📧
1.05	Evidence of site control	New	1	📧
1.06	Preliminary Commitment Letter	New	1	📧
1.07	RIHousing Appraisal RFQ	Pending Assignees	1	📧
1.08	RIHousing Commissioned Appraisal	Pending Assignees	1	📧
1.09	RIHousing Commissioned Market Study	Pending Assignees	1	📧
1.10	Firm Approval for Credit Committee	New	1	📧
1.11	Firm RFA	New	1	📧
1.12	Firm Commitment Letter	New	1	📧

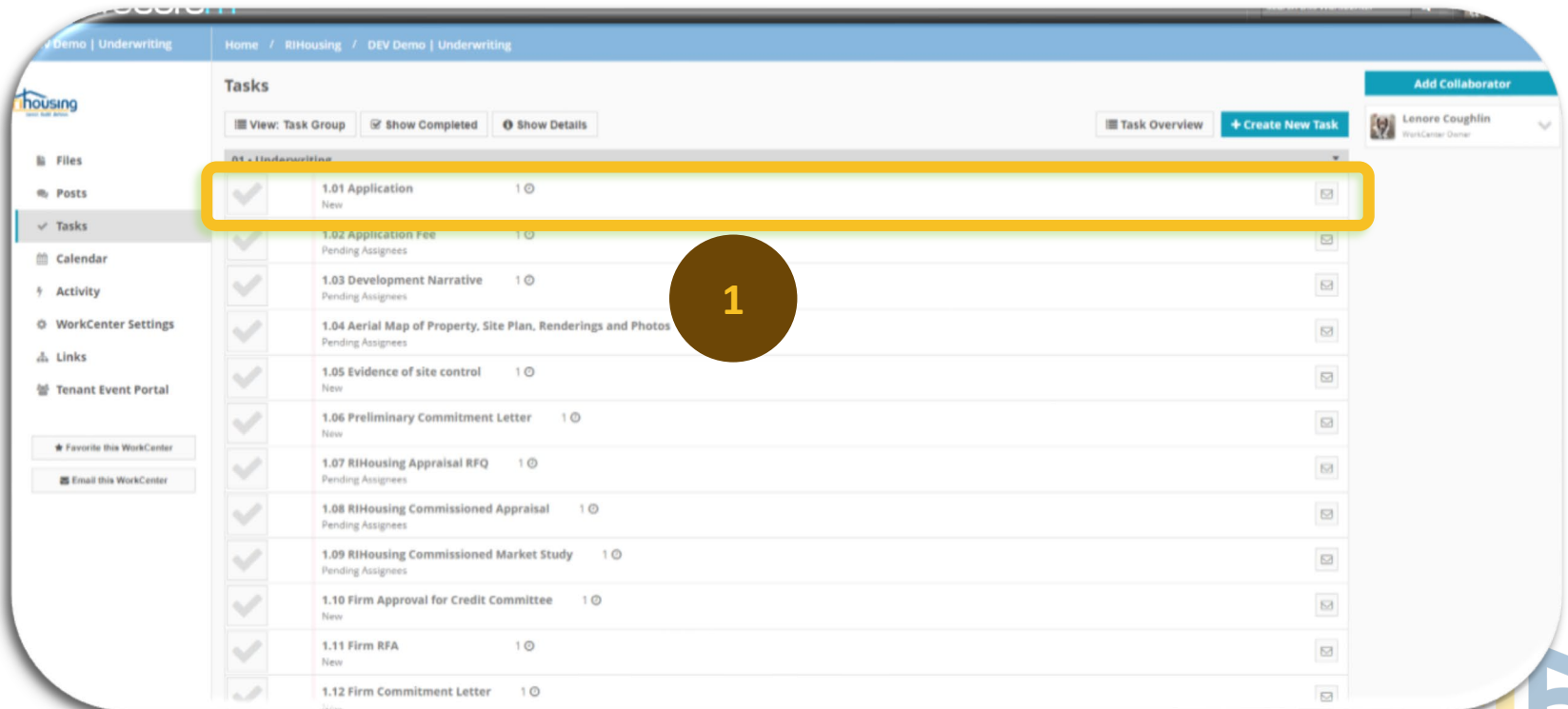




Task Details

1

Click on a task to see the Task Details screen.



The screenshot shows the 'Tasks' section of the Procorem interface. The left sidebar contains navigation options: Files, Posts, Tasks (selected), Calendar, Activity, WorkCenter Settings, Links, and Tenant Event Portal. The main content area displays a list of tasks under the heading 'At Undersubline'. The tasks are listed in a table with columns for task ID, description, status, and a '1' icon. A yellow box highlights the first task, '1.01 Application', which is marked as 'New'. A brown circle with the number '1' is overlaid on the task list, indicating the click point.

Task ID	Description	Status	Icon
1.01	Application	New	1
1.02	Application Fee	Pending Assignees	1
1.03	Development Narrative	Pending Assignees	1
1.04	Aerial Map of Property, Site Plan, Renderings and Photos	Pending Assignees	1
1.05	Evidence of site control	New	1
1.06	Preliminary Commitment Letter	New	1
1.07	RIHousing Appraisal RFQ	Pending Assignees	1
1.08	RIHousing Commissioned Appraisal	Pending Assignees	1
1.09	RIHousing Commissioned Market Study	Pending Assignees	1
1.10	Firm Approval for Credit Committee	New	1
1.11	Firm RFA	New	1
1.12	Firm Commitment Letter	New	1

1

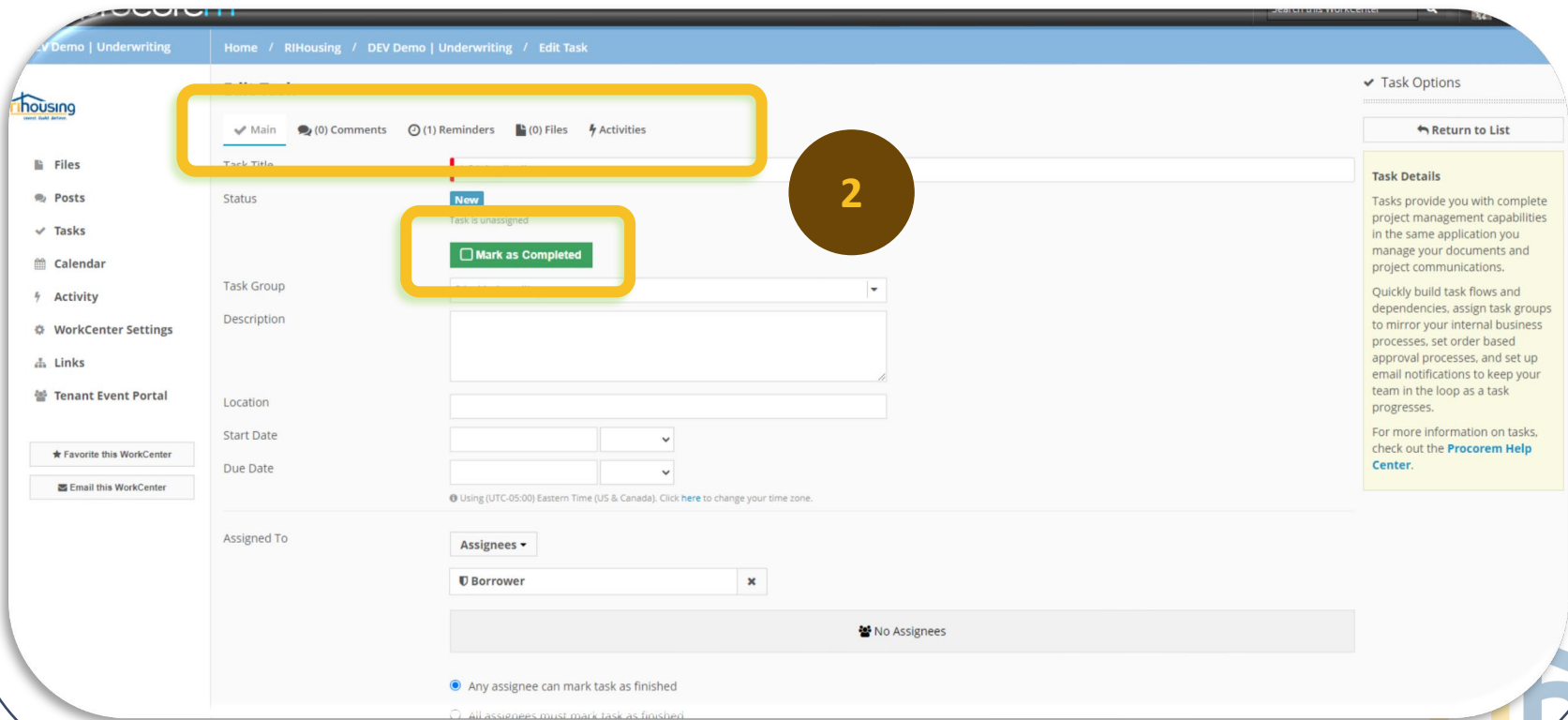




Task Details

2

Complete the task or add Comments and Files as applicable.



The screenshot shows the 'Task Details' page in the Procorem application. The page is titled 'Edit Task' and is part of a breadcrumb trail: 'Home / RIHousing / DEV Demo | Underwriting / Edit Task'. The left sidebar contains navigation options: Files, Posts, Tasks, Calendar, Activity, WorkCenter Settings, Links, and Tenant Event Portal. The main content area includes a 'Task Title' field, a 'Status' dropdown (set to 'New'), and a 'Task Group' dropdown. A 'Description' text area is present, along with 'Location', 'Start Date', and 'Due Date' fields. The 'Assigned To' section shows an 'Assignees' dropdown and a search box containing 'Borrower'. A 'Mark as Completed' button is highlighted with a yellow box. A large brown circle with the number '2' is overlaid on the 'Mark as Completed' button. The top navigation bar includes 'Main', '(0) Comments', '(1) Reminders', '(0) Files', and 'Activities'. The right sidebar contains 'Task Options' with a 'Return to List' button and a 'Task Details' section with explanatory text and a link to the 'Procorem Help Center'. At the bottom, there are radio buttons for 'Any assignee can mark task as finished' (selected) and 'All assignees must mark task as finished'.

2

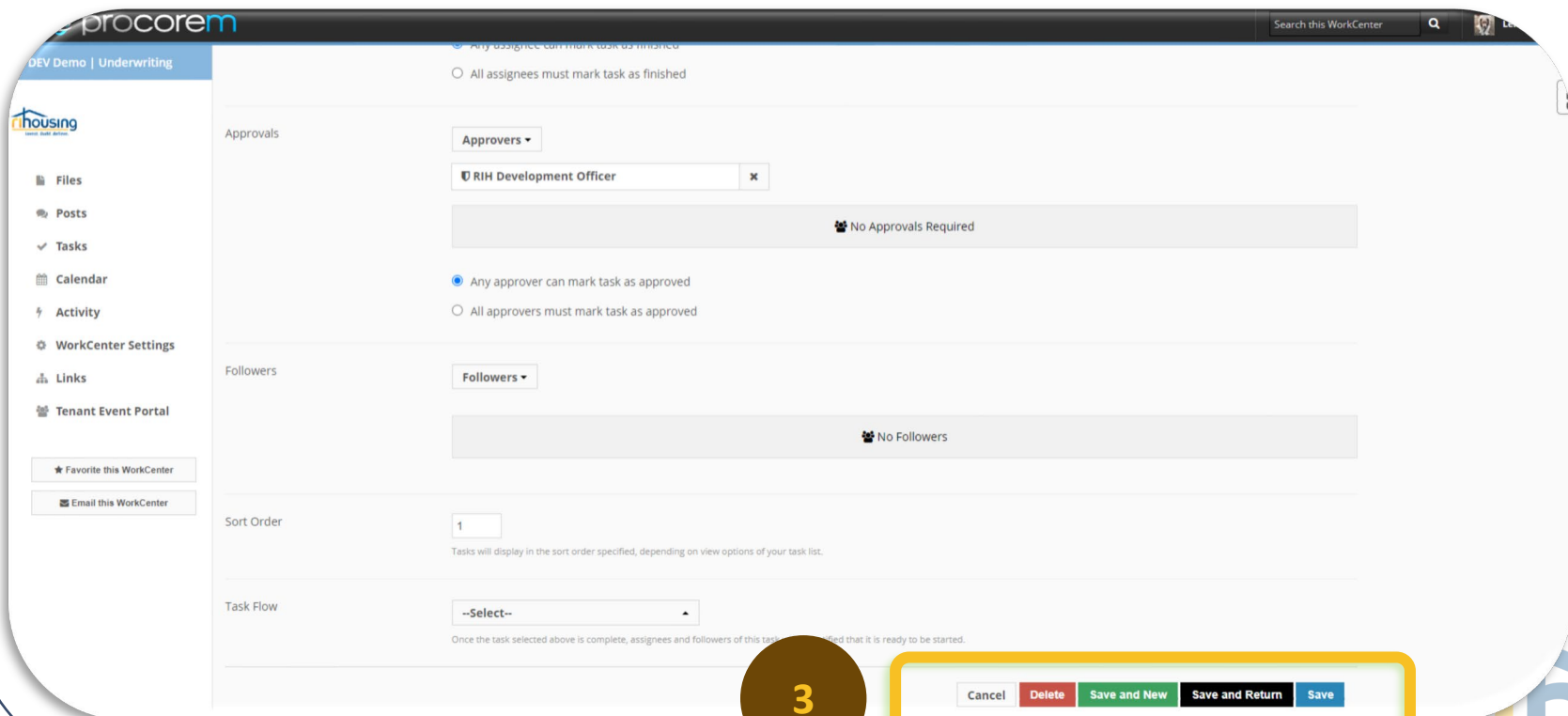




Task Details

3

Select **Cancel** if you've taken no action but return to the task list. **Save and Return** will save your progress and go back to the task list.



The screenshot shows the Procorem 'Task Details' page. The interface includes a left sidebar with navigation options like 'Files', 'Posts', 'Tasks', 'Calendar', 'Activity', 'WorkCenter Settings', 'Links', and 'Tenant Event Portal'. The main content area is divided into sections: 'Approvals' with a dropdown menu set to 'Approvers' and a search box containing 'RIH Development Officer'; 'Followers' with a dropdown menu set to 'Followers'; 'Sort Order' with a text input field containing '1'; and 'Task Flow' with a dropdown menu set to '--Select--'. At the bottom right, a yellow-bordered box highlights a row of five buttons: 'Cancel', 'Delete', 'Save and New', 'Save and Return', and 'Save'. A large blue checkmark is visible in the top right corner of the overall image.

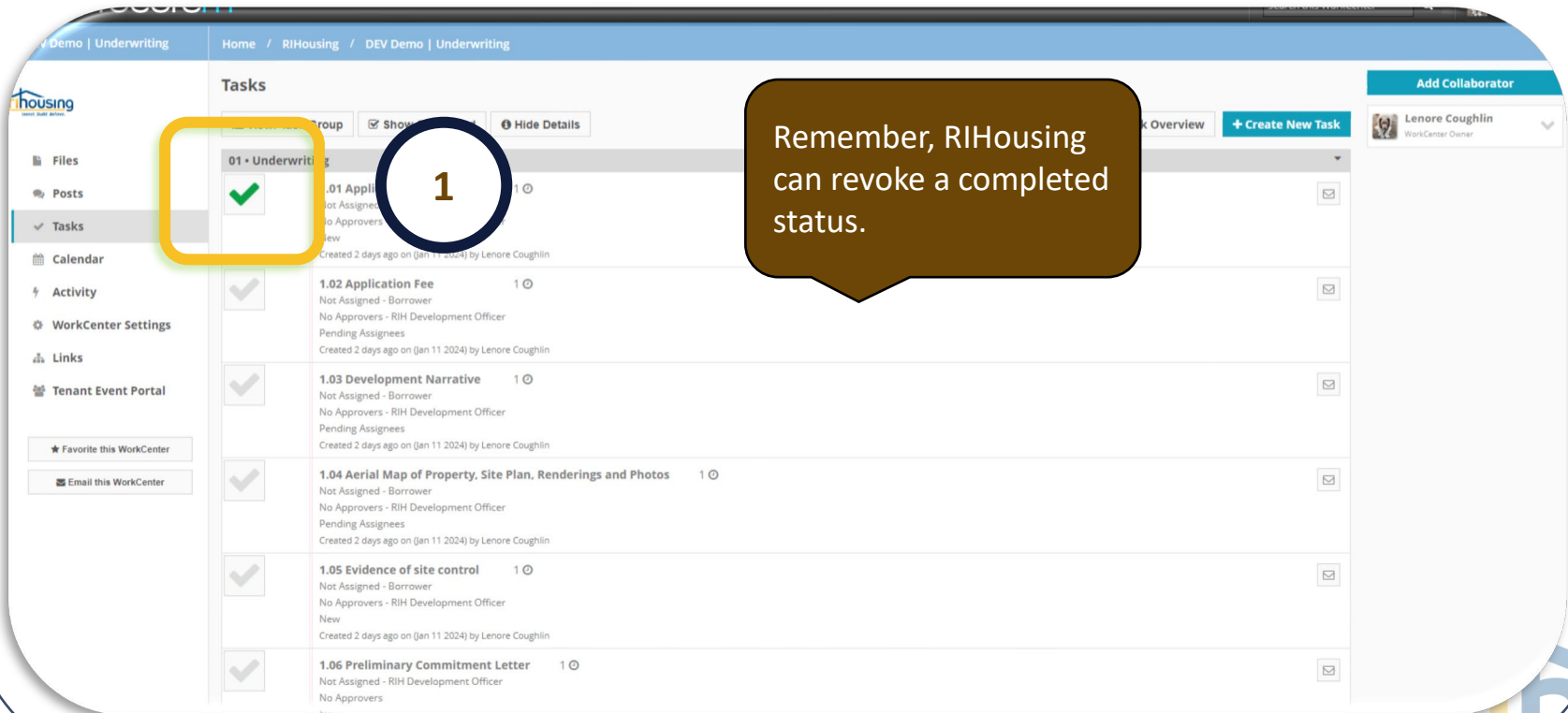
3



Completing Tasks | Option 1

1

Click on the empty check box to turn the icon green; this indicates that the task has been completed.



The screenshot shows the 'Tasks' page in the Procorem application. The page has a blue header with navigation links: 'Demo / Underwriting', 'Home / RIHousing / DEV Demo | Underwriting'. On the left is a sidebar with navigation options: Files, Posts, Tasks (selected), Calendar, Activity, WorkCenter Settings, Links, and Tenant Event Portal. The main content area displays a list of tasks. The first task, '01 - Underwriting', has a green checkmark in its status column, which is highlighted by a yellow box. A blue circle with the number '1' is placed over this checkmark. Below it, a brown callout box contains the text: 'Remember, RIHousing can revoke a completed status.' The rest of the task list includes '1.02 Application Fee', '1.03 Development Narrative', '1.04 Aerial Map of Property, Site Plan, Renderings and Photos', '1.05 Evidence of site control', and '1.06 Preliminary Commitment Letter', all with empty checkmarks in their status columns.

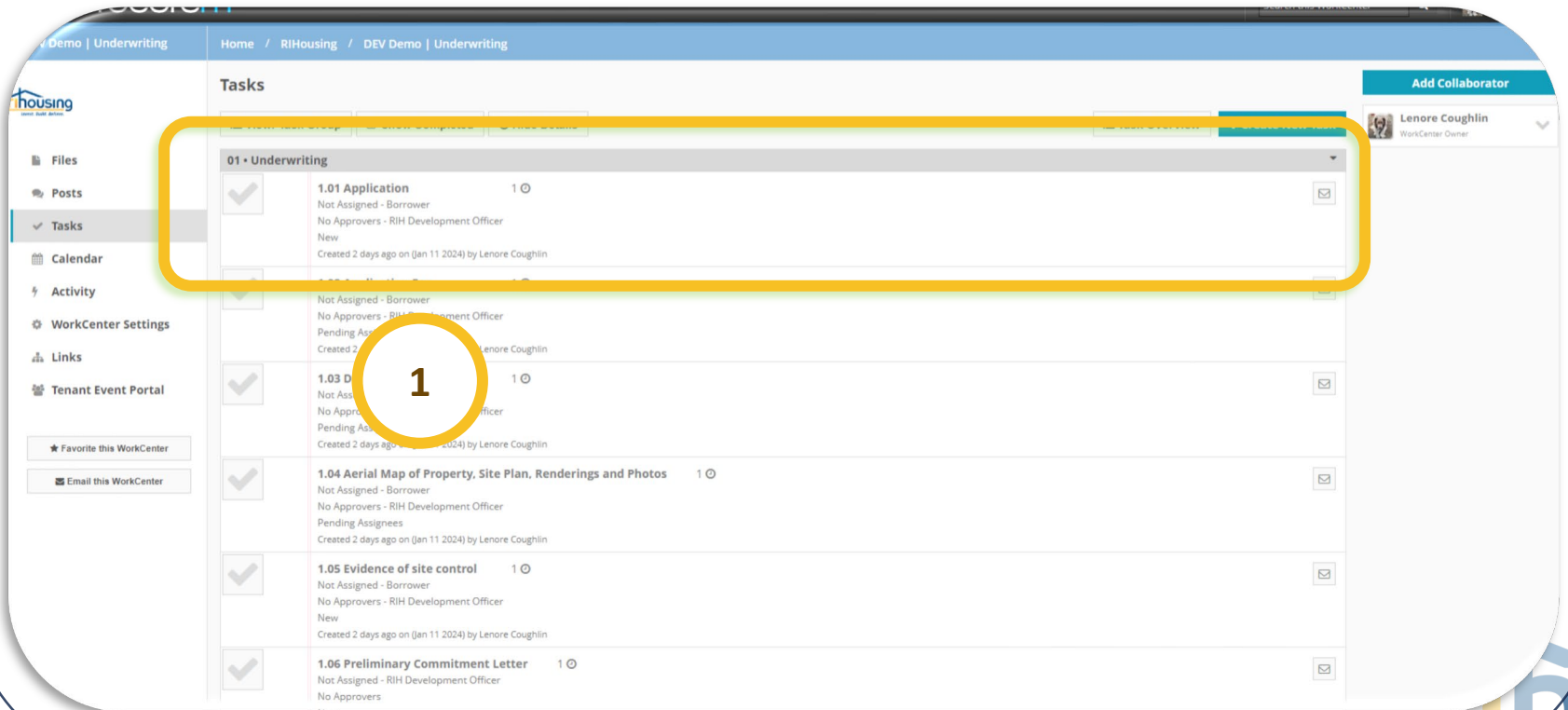




Completing Tasks | Option 2

1

Click on the task to be completed to open the Task Details screen



The screenshot displays the Procorem 'Tasks' interface. The left sidebar contains navigation options: Files, Posts, Tasks (selected), Calendar, Activity, WorkCenter Settings, Links, and Tenant Event Portal. The main content area shows a list of tasks under the heading '01 - Underwriting'. The first task, '1.01 Application', is highlighted with a yellow box. A yellow circle with the number '1' is placed over the task title. The task details for '1.01 Application' are: Not Assigned - Borrower, No Approvers - RIH Development Officer, New, Created 2 days ago on (Jan 11 2024) by Lenore Coughlin. Other tasks in the list include '1.03 D...', '1.04 Aerial Map of Property, Site Plan, Renderings and Photos', '1.05 Evidence of site control', and '1.06 Preliminary Commitment Letter'. The right sidebar shows the user profile for Lenore Coughlin, WorkCenter Owner, with an 'Add Collaborator' button.

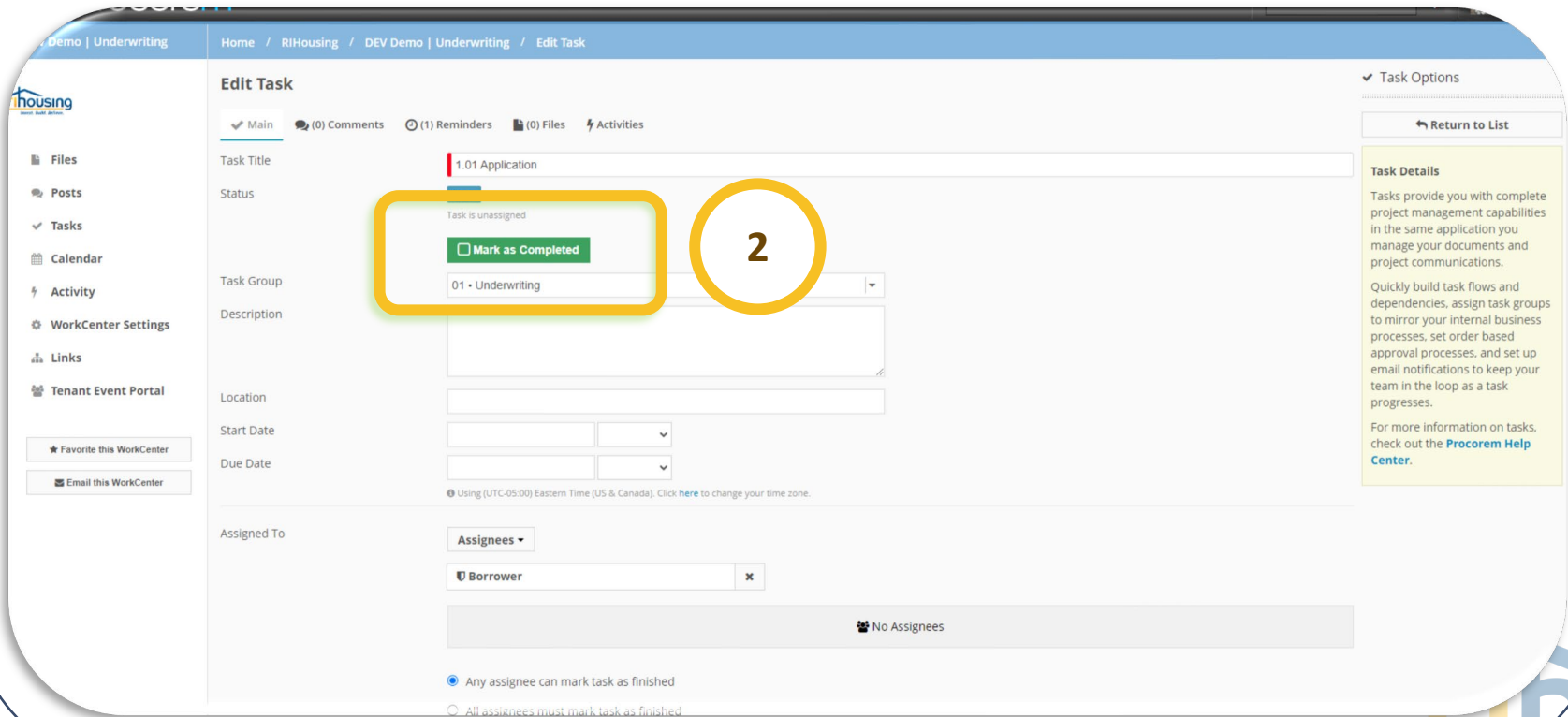




Completing Tasks | Option 2

2

Click **Mark as Completed**.



Edit Task

Home / RIHousing / DEV Demo | Underwriting / Edit Task

Task Title: 1.01 Application

Status: Task is unassigned

Mark as Completed

Task Group: 01 • Underwriting

Assigned To: Assignees

Borrower

No Assignees

Any assignee can mark task as finished

All assignees must mark task as finished

Task Options

[Return to List](#)

Task Details

Tasks provide you with complete project management capabilities in the same application you manage your documents and project communications.

Quickly build task flows and dependencies, assign task groups to mirror your internal business processes, set order based approval processes, and set up email notifications to keep your team in the loop as a task progresses.

For more information on tasks, check out the [Procorem Help Center](#).





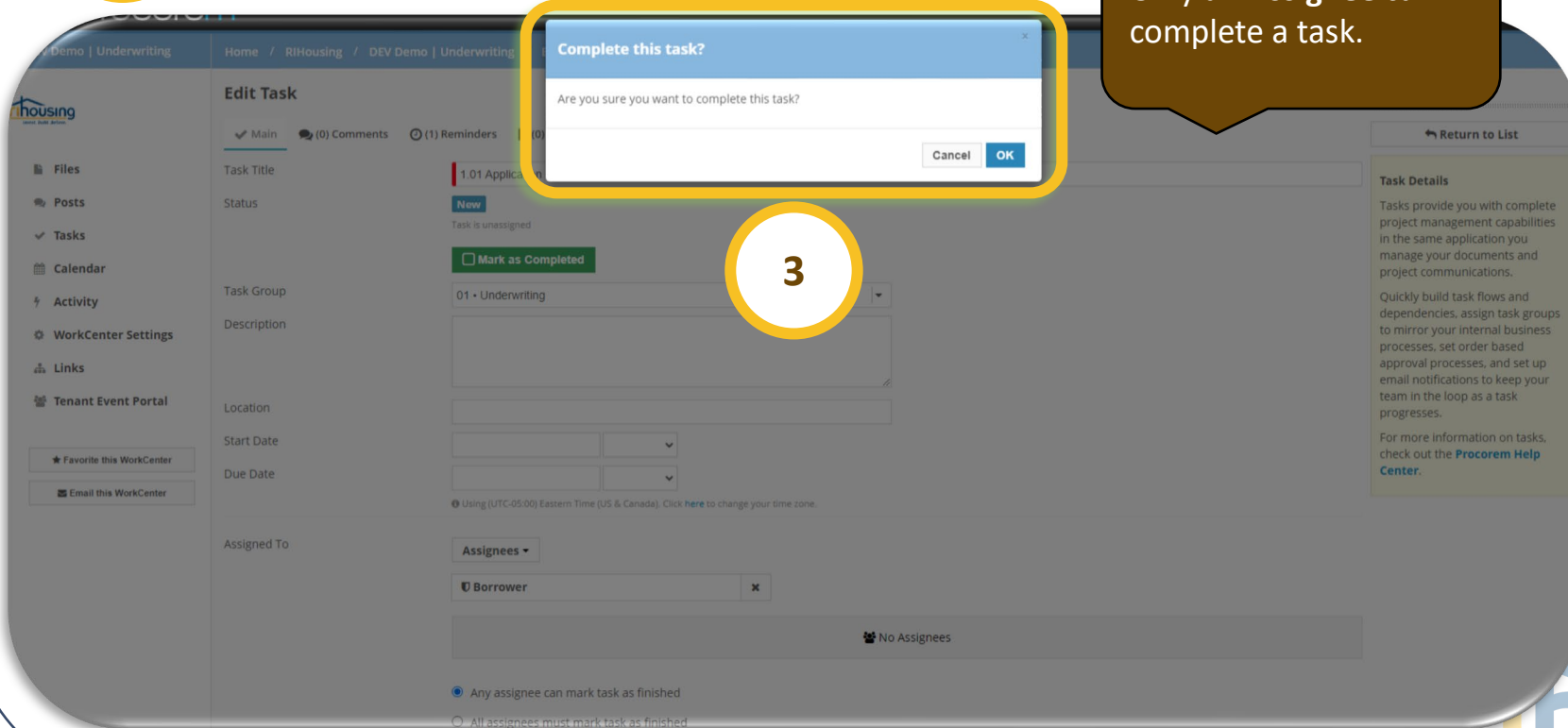
Completing Tasks | Option 2

3

Click OK.

Only an Assignee can complete a task.

3



Complete this task?

Are you sure you want to complete this task?

Cancel OK

Mark as Completed

01 - Underwriting

Assigned To: Borrower

No Assignees

Any assignee can mark task as finished

All assignees must mark task as finished

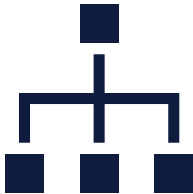
Task Details

Tasks provide you with complete project management capabilities in the same application you manage your documents and project communications.

Quickly build task flows and dependencies, assign task groups to mirror your internal business processes, set order based approval processes, and set up email notifications to keep your team in the loop as a task progresses.

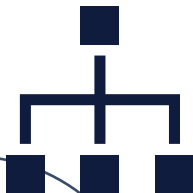
For more information on tasks, check out the [Procorem Help Center](#).





Links

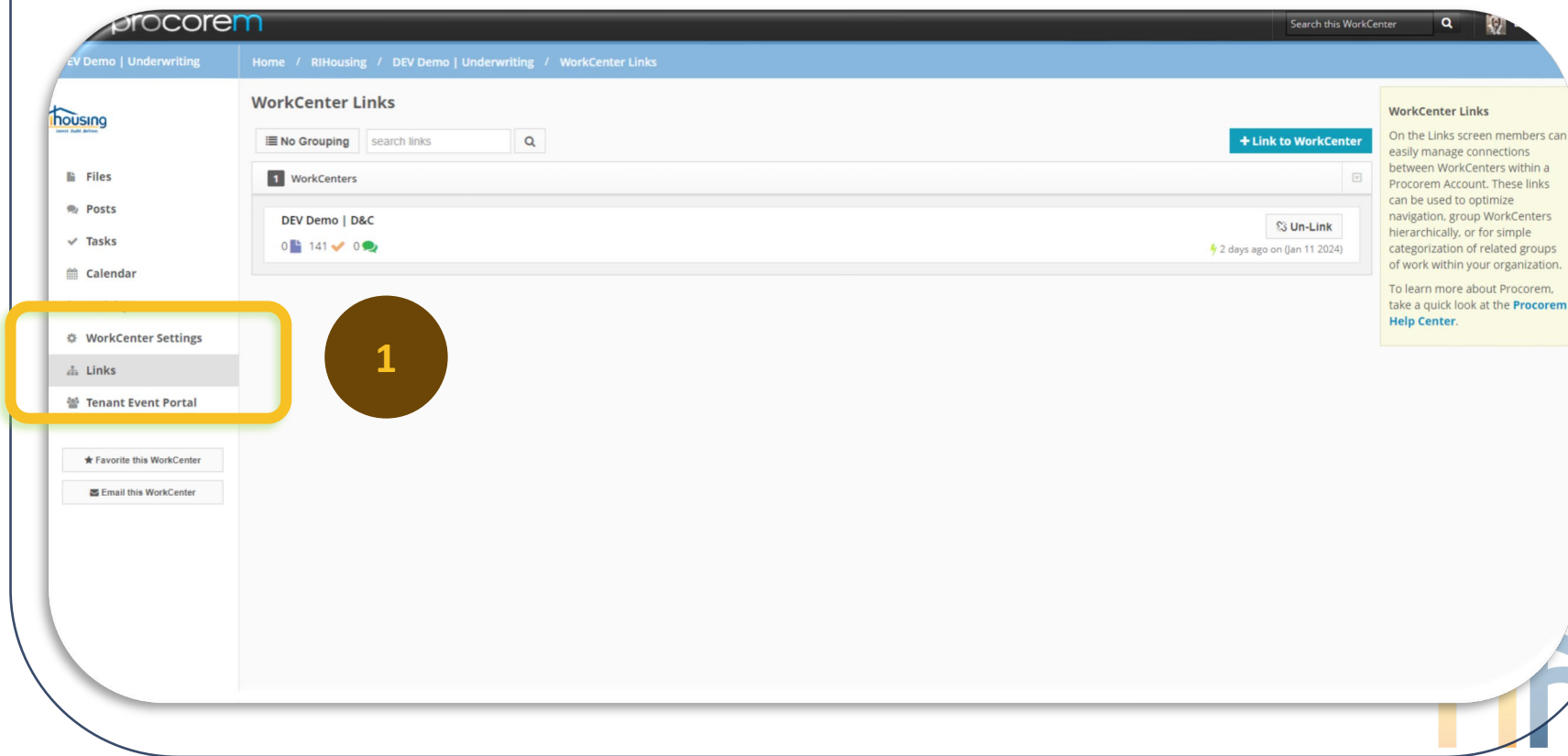




Links

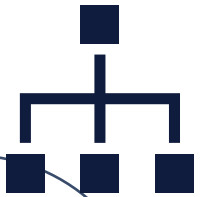
1

Some workcenters have links to other workcenters built in. Select the **Links** option from the left menu.



The screenshot displays the Procorem WorkCenter interface. The left sidebar contains a navigation menu with the following items: Files, Posts, Tasks, Calendar, WorkCenter Settings, Links, and Tenant Event Portal. The 'Links' option is highlighted with a yellow box and a large brown circle containing the number '1'. The main content area is titled 'WorkCenter Links' and features a search bar, a '+ Link to WorkCenter' button, and a list of workcenters. The first entry is 'DEV Demo | D&C', which includes a document icon, a checkmark, a speech bubble, and a timestamp of '2 days ago (Jan 11 2024)'. An 'Un-Link' button is visible next to this entry. A yellow callout box on the right side of the screen provides information about WorkCenter Links, stating that members can manage connections between workcenters to optimize navigation and categorization. It also includes a link to the Procorem Help Center.

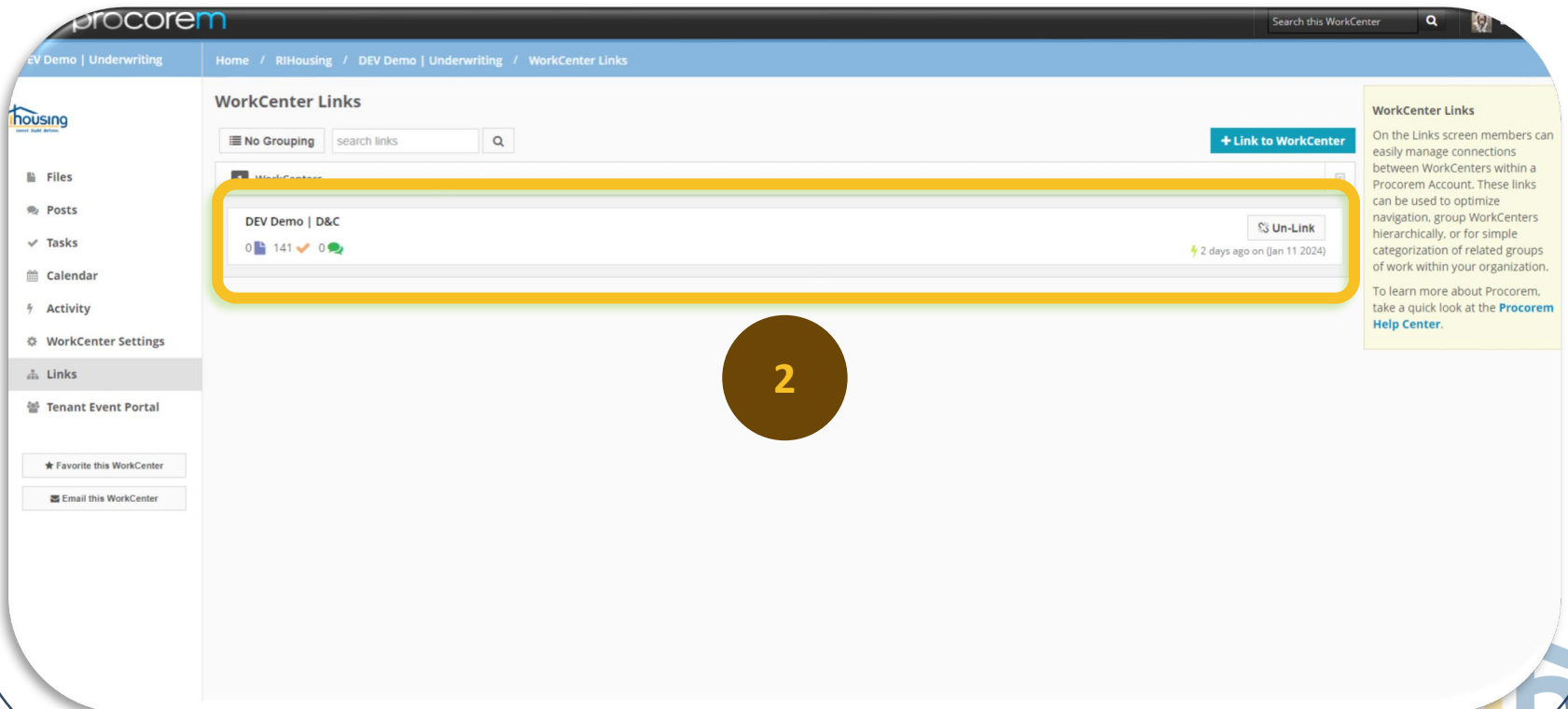
1



Links

2

If the list is blank, there are no links. If links exist, they will be displayed in a list format below. Click to navigate to another workcenter.



The screenshot shows the Procorem WorkCenter Links interface. The breadcrumb trail is: Home / RIHousing / DEV Demo | Underwriting / WorkCenter Links. The page title is "WorkCenter Links". There is a search bar with "No Grouping" and "search links" options. A blue button "+ Link to WorkCenter" is visible. A list of links is shown, with one link highlighted by a yellow box: "DEV Demo | D&C". This link has a document icon, a checkmark, and a speech bubble icon, with the number "141" next to the checkmark. An "Un-Link" button is next to the link. The link was created "2 days ago on (Jan 11 2024)". A sidebar on the left contains navigation options: Files, Posts, Tasks, Calendar, Activity, WorkCenter Settings, Links (selected), and Tenant Event Portal. At the bottom of the sidebar are buttons for "Favorite this WorkCenter" and "Email this WorkCenter". A yellow circle with the number "2" is overlaid on the link list. A help box on the right explains the "WorkCenter Links" feature.

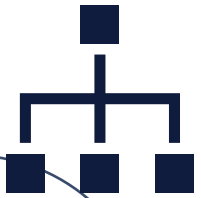
WorkCenter Links

On the Links screen members can easily manage connections between WorkCenters within a Procorem Account. These links can be used to optimize navigation, group WorkCenters hierarchically, or for simple categorization of related groups of work within your organization.

To learn more about Procorem, take a quick look at the [Procorem Help Center](#).

2

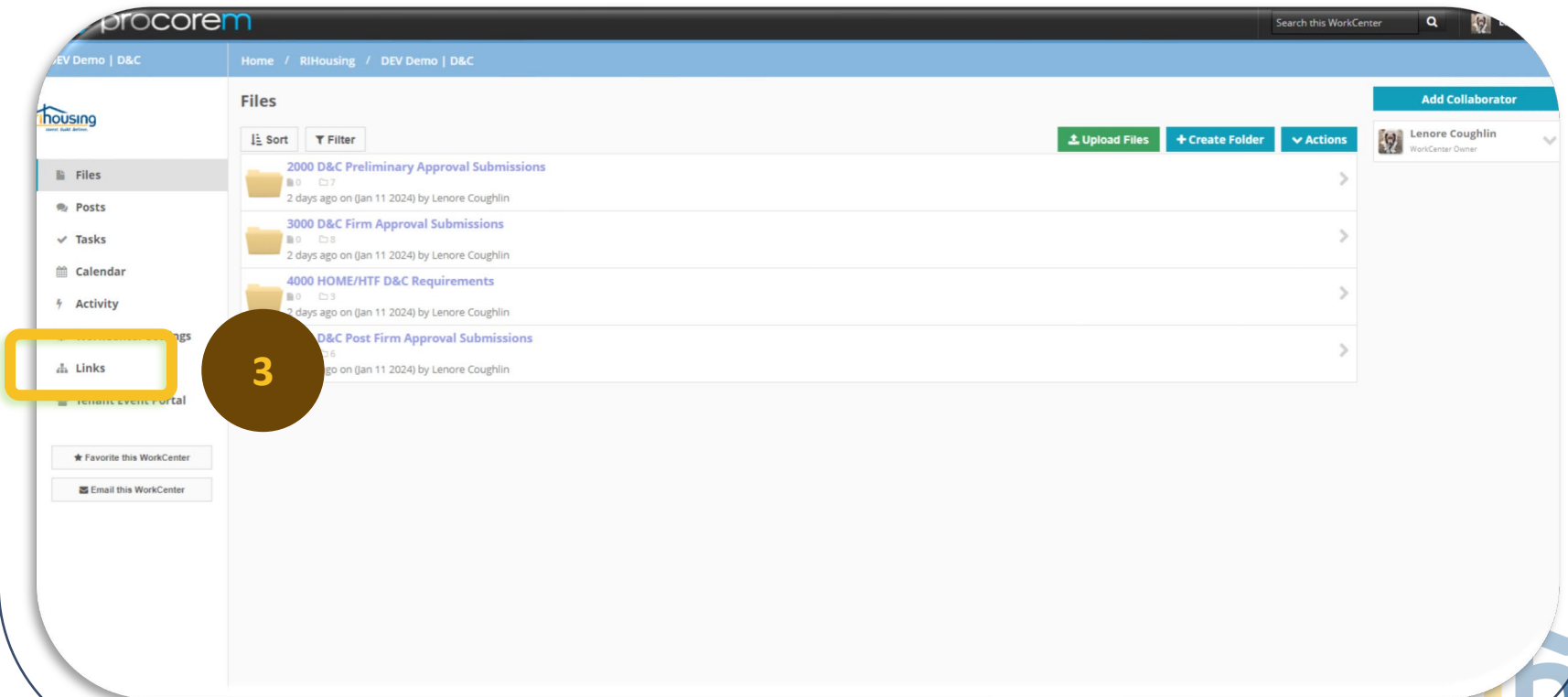




Links

3

Return to the previous workcenter by accessing Links. Repeat steps 1-2.



The screenshot displays the Procorem web application interface. The top navigation bar includes the Procorem logo, a search bar labeled "Search this WorkCenter", and a user profile for Lenore Coughlin. The main content area is titled "Files" and shows a list of folders: "2000 D&C Preliminary Approval Submissions", "3000 D&C Firm Approval Submissions", "4000 HOME/HTF D&C Requirements", and "D&C Post Firm Approval Submissions". On the left sidebar, the "Links" menu item is highlighted with a yellow rectangular box. A large, semi-transparent number "3" is overlaid on the screenshot, positioned over the "Links" menu item and the "D&C Post Firm Approval Submissions" folder. The "Add Collaborator" panel on the right shows "Lenore Coughlin" as the "WorkCenter Owner".

3

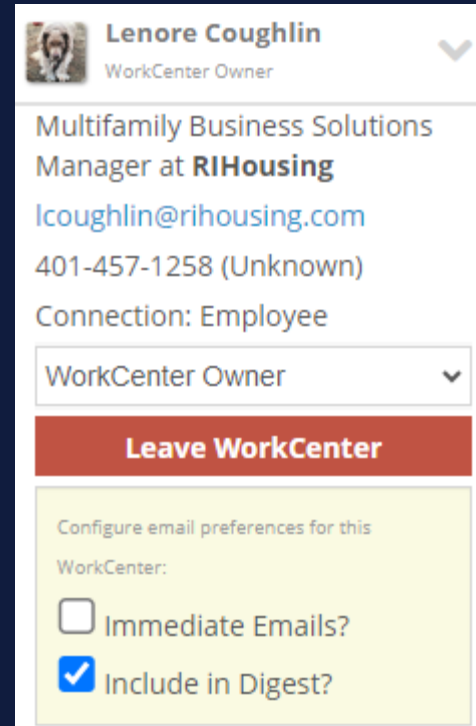


Procorem Help



Procorem E-mail Frequency

Access each workcenter and un-select **Immediate E-mails** to receive one digest e-mail daily rather than receive an e-mail for each activity in the workcenter.



The screenshot shows a user profile for Lenore Coughlin, identified as a WorkCenter Owner. The profile includes contact information: Multifamily Business Solutions Manager at RIHousing, email lcoughlin@rihousing.com, and phone number 401-457-1258 (Unknown). The connection is listed as Employee. Below this is a dropdown menu currently set to 'WorkCenter Owner'. A red button labeled 'Leave WorkCenter' is visible. At the bottom, there is a section for configuring email preferences for this WorkCenter, with two options: 'Immediate Emails?' (unchecked) and 'Include in Digest?' (checked).

Visit the [Trainings & Opportunities](#) page for all available Procorem Resources



Questions



Lenore Coughlin

Multi-Family Business Solutions Manager

401-457-1258

lcoughlin@rihousing.com

