Procorem Budget Pro
User Guide

Updated: January 3, 2022

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1. About Procorem

1.1. What Is Procorem?

Procorem is a web-based portal used to securely submit files and provide access to the Budget Pro Application. It has many features available, although we may not use them all. A video with more details is provided after you log in.

1.2. Access Procorem

Procorem is the same system we use for accepting files for Development Underwriting and Tax Credit Allocation Applications. If you already have access, you will use your same log in credentials.

Step	Action
1	For this process, you will receive an email invite to access a Procorem Construction Workcenter when you are identified as a member of a construction budget. If you are not a current user, you must create a password and accept the terms of service.
2	To access Procorem after the first time, go to app.procorem.com. Your email is your username.

Step	Action
3	Once logged in, you will be within Virginia Housing'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. **Note:** If you click the **X** in the **Welcome to Procorem** page, it will not appear again allowing more screen real estate.

1.3.   Navigating within Procorem

Step	Action
1	On the left menu bar, you will see options for all the work centers that you are assigned to. The most recent 5 will appear. Click on a specific work center or select view all to see a full list. The Construction WorkCenter will be named the Deal Name – Construction.

Step	Action
2	When you first access your workcenter, you will land on the Budgets page.
3	There is also an option on the left panel labeled Files. Owners will submit their draw packages directly via these folders. This also allows you to see the collaborators of the site. All of the users that can see this site and their roles are listed on the right. Each role has different permissions. Multiple collaborators can have the same role.

Step	Action
4	If you already have access to the Development Underwriting workcenter, you can switch between the two through the Links Option.
5	If you have many workcenters assigned to you, you can favorite a workcenter and access your favorite list from the home screen.

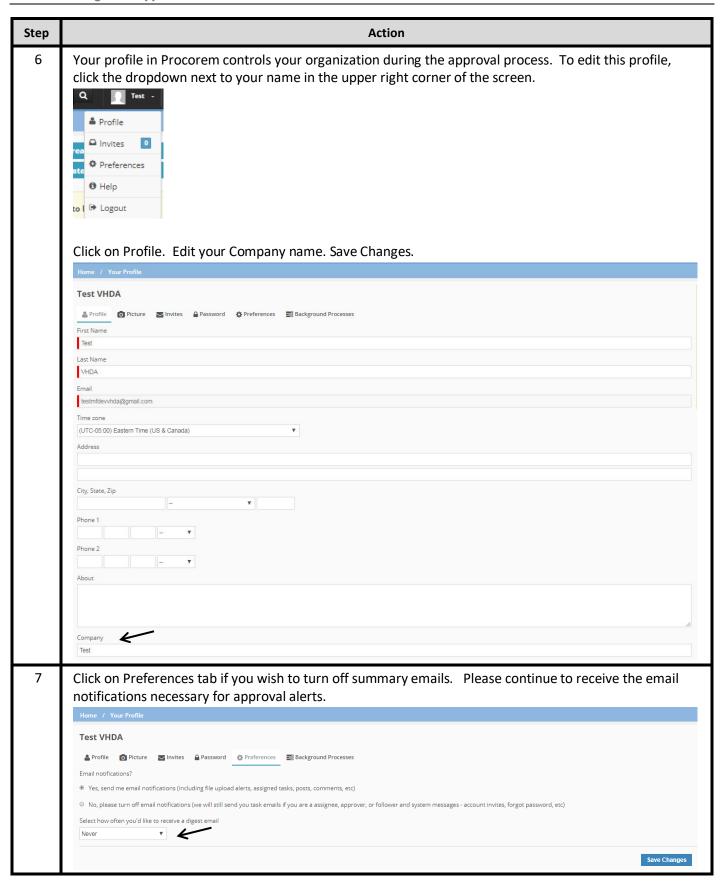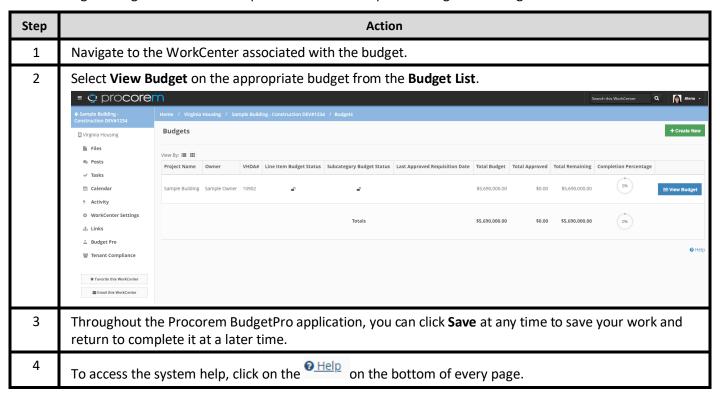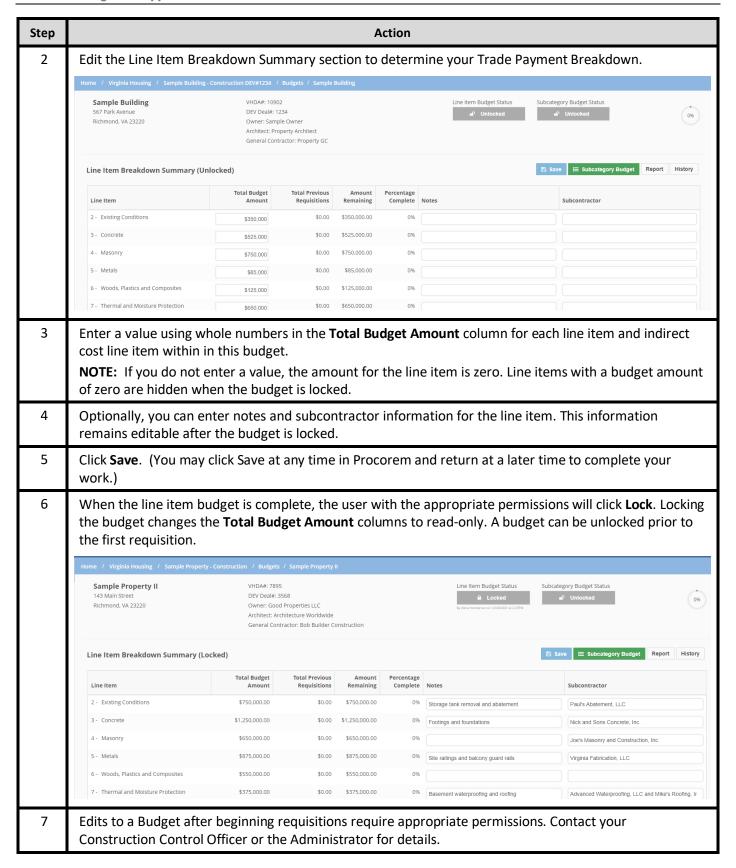| Step	Action
6	Your profile in Procorem controls your organization during the approval process. To edit this profile, click the dropdown next to your name in the upper right corner of the screen. Click on Profile. Edit your Company name. Save Changes.
7	Click on Preferences tab if you wish to turn off summary emails. Please continue to receive the email notifications necessary for approval alerts.

2. Budgets

2.1. Access a Budget

All users with access to a workcenter will be able to view the budget. Each workcenter may have multiple budgets assigned based on the specifics of the development. Virginia Housing will create this record.

Step	Action
1	Navigate to the WorkCenter associated with the budget.
2	Select **View Budget** on the appropriate budget from the **Budget List**.
3	Throughout the Procorem BudgetPro application, you can click **Save** at any time to save your work and return to complete it at a later time.
4	To access the system help, click on the **Help** on the bottom of every page.

2.2. Create a Line Item Budget (Trade Payment Breakdown)

You can work on both the line item budget and the subcategory budget simultaneously. However, the line item budget must be completed and locked before the subcategory budget is completed and locked. The subcategory budget amounts must balance to the associated line item. Virginia Housing will lock the stages as needed.

Step	Action
1	Select **View Budget** on the appropriate budget from the **Budget List**.

Step	Action
2	Edit the Line Item Breakdown Summary section to determine your Trade Payment Breakdown.
3	Enter a value using whole numbers in the **Total Budget Amount** column for each line item and indirect cost line item within in this budget. **NOTE:** If you do not enter a value, the amount for the line item is zero. Line items with a budget amount of zero are hidden when the budget is locked.
4	Optionally, you can enter notes and subcontractor information for the line item. This information remains editable after the budget is locked.
5	Click **Save**. (You may click Save at any time in Procorem and return at a later time to complete your work.)
6	When the line item budget is complete, the user with the appropriate permissions will click **Lock**. Locking the budget changes the **Total Budget Amount** columns to read-only. A budget can be unlocked prior to the first requisition.
7	Edits to a Budget after beginning requisitions require appropriate permissions. Contact your Construction Control Officer or the Administrator for details.

2.3. Create a Trade Payment Breakdown Report

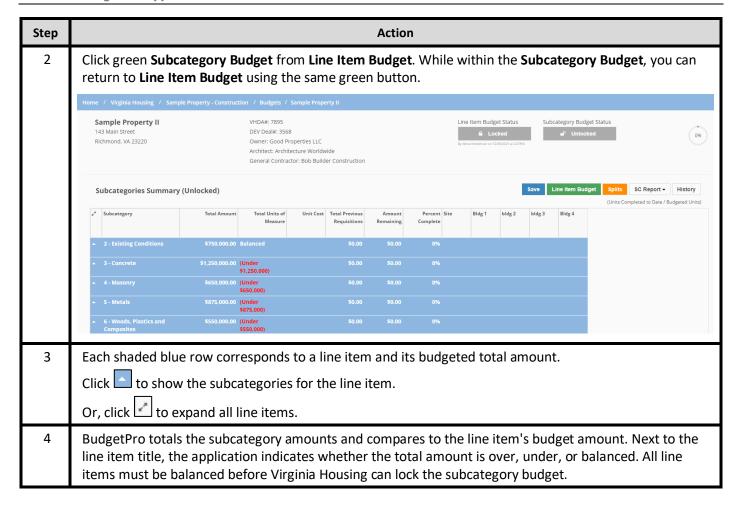You will create the Trade Payment Breakdown from Procorem BudgetPro.   It will list all line items with or without budgeted dollar amounts.

Step	Action
1	From the **Line Item Breakdown Summary** screen, click **Report** to download a PDF of this report. The report can be created regardless of locked status.
2	A Trade Payment Breakdown PDF will display with the information from your budget. Sign this document and forward to the Owner. The Owner will sign and provide to Virginia Housing.

Virginia Housing

Trade Payment Breakdown

DEV Deal#:	3568	Architect:	Architecture Worldwide
VHDA#:	7895	Owner:	Good Properties LLC
Deal Name:	Sample Property II	General Contractor:	Bob Builder Construction
Location:	Richmond VA 23220		

	Trade Item	Total Costs	Notes	Subcontractor
2	Existing Conditions	$750,000	Storage tank removal and abatement	Paul's Abatement, LLC
3	Concrete	$1,250,000	Footings and foundations	Nick and Sons

2.4. Create a Subcategory Budget

You can work on both the line item budget and the subcategory budget simultaneously. However, the line item budget must be completed and locked before the subcategory budget is completed and locked. The subcategory budget amounts must balance to the associated line item.

Step	Action
1	Select **View Budget** on the appropriate budget from the **Budget List**.

Step	Action
2	Click green **Subcategory Budget** from **Line Item Budget**. While within the **Subcategory Budget**, you can return to **Line Item Budget** using the same green button.
3	Each shaded blue row corresponds to a line item and its budgeted total amount. Click ⬆ to show the subcategories for the line item. Or, click ⤢ to expand all line items.
4	BudgetPro totals the subcategory amounts and compares to the line item's budget amount. Next to the line item title, the application indicates whether the total amount is over, under, or balanced. All line items must be balanced before Virginia Housing can lock the subcategory budget.

2.4.1. Creating Splits

Splits are a way to define how the project work will be completed and how many units of measure are calculated. BudgetPro allows up to 50 splits with a label of 30 characters each. If you are completing multiple buildings or a building with multiple floors, you might have a split for each building or each floor. Then as you requisition from this budget, you will indicate the units complete in each split.

Any splits defined on the budget's template will configure default Splits columns. You can add, delete, or change the columns. However, at least one split is required to lock the subcategory budget.
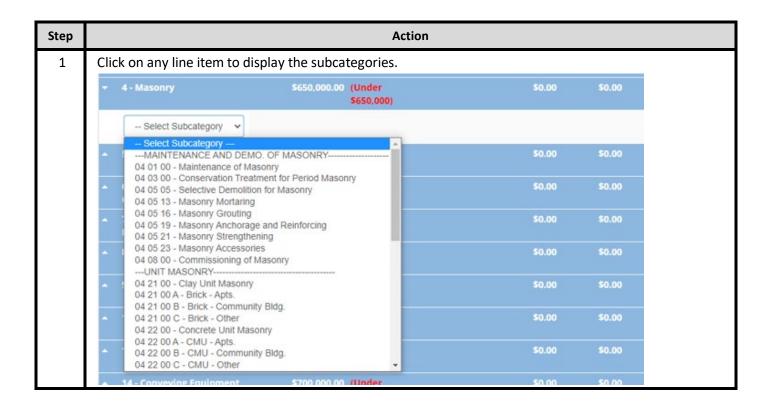
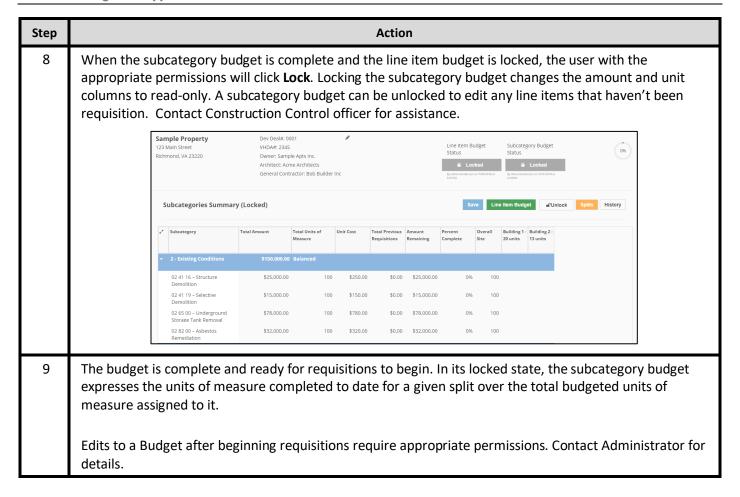| Step	Action
1	To add or edit splits, click **Splits**. • To add a new split, enter the name of a split, and then click ➕. • To edit an existing split, click ✏ and then update the name. • To delete an existing split, click ❌. If you delete a split, the units assigned in the subcategory are removed and the units of measure are recalculated.
2	Click up/down arrows to reorder the splits, if needed. The order will determine the sort order of the columns on the screen and within subcategory reports.

Step	Action
3	After you complete all splits changes needed, click **Save**.

2.4.2. Adding Subcategories

Within Procorem BudgetPro, Virginia Housing has created subcategories to coincide with the most commonly used values from Construction Specification Institute (CSI) MasterSpec 50 Division format. These are commonly used in the construction industry and should integrate well with how most general contractors typically create a budget.

Within a selected line item, you might see the default subcategories from the template. You can use these default subcategories or you can also select other subcategories from the **Select Subcategory** list. If needed, a new custom subcategory can be created for this project only. You can use each subcategory only once. Contact your Construction Control Officer for details.

Step	Action
1	Click on any line item to display the subcategories.

Step	Action
2	Enter a value, with up to two decimal places, in the **Total Amount** column for each subcategory. If you do not enter a value, the amount for the subcategory is zero and does not appear on the locked subcategory budget.
3	To remove a Subcategory, click **X** on the left of its title.
4	BudgetPro totals the subcategory amounts and compares to the line item's budget amount. Next to the line item title, the application indicates whether the total amount is over, under, or balanced. All line items must be balanced before you can lock the subcategory budget.
5	Enter units of measure across the Split columns created for this project. Units of measure are flexible, and you should assign them as the work and materials dictate. You can use units of measure to designate: • An actual count for materials. For example, if you are installing 20 doors on a project, allocate 20 units of measure. • A percentage of a larger task to be completed. For example, if you are excavating rock, assign 100 units of measure, which can be requisitioned as a percentage of work completed to date. Units of measure are required for at least one split per subcategory but all splits are not required on all subcategories. The application automatically updates **Total Units of Measure** based on the split units entered. The **Unit Cost** is calculated by the total amount divided by the total units of measure, rounding down. If, due to the calculation, there is remaining change this will be disbursed along with the standard unit cost when the subcategory reaches 100% complete. The units of measure entered within the subcategory budget are used to requisition funds. If 100 is used in a split to indicate percentage, requesting 30 units refers to being 30% complete in that subcategory and will be allocated that amount based on unit cost.
6	Click **Save** at any time to save your work.
7	Indirect costs such as General Requirements, Profit, and Overhead are not allocated to subcategories and are released in direct correlation to the line items requested. Other indirect costs such as Bond Premiums or Soil Borings are requested as incurred.

Step	Action
8	When the subcategory budget is complete and the line item budget is locked, the user with the appropriate permissions will click **Lock**. Locking the subcategory budget changes the amount and unit columns to read-only. A subcategory budget can be unlocked to edit any line items that haven't been requisition. Contact Construction Control officer for assistance.
9	The budget is complete and ready for requisitions to begin. In its locked state, the subcategory budget expresses the units of measure completed to date for a given split over the total budgeted units of measure assigned to it. Edits to a Budget after beginning requisitions require appropriate permissions. Contact Administrator for details.

2.5.   View a Subcategory Summary Report

The **Subcategory Summary Report** helps you track progress made to date for project work done at the subcategory level. The report shows all information in the subcategory grid at the time you create the report.

Step	Action
1	Select **View Budget** on the appropriate budget from the **Budget List**.
2	Click **Subcategory Budget** to open the subcategory budget.
3	Click **Report** and then select one of the following options, to download a PDF version of the report: • **All**—Show all budget subcategories. • **Remaining**—Show only the budget subcategories with funds remaining.

2.6.   View a Budget's History

The Procorem BudgetPro application tracks all saved changes to the budget record. Click **History** on any budget page to see specific details about the changes to the budget by user.

3. Requisitions

3.1. Budget Requisitions

After the line item and subcategory budgets are both locked, you can begin creating requisitions to initiate draws on the budget.
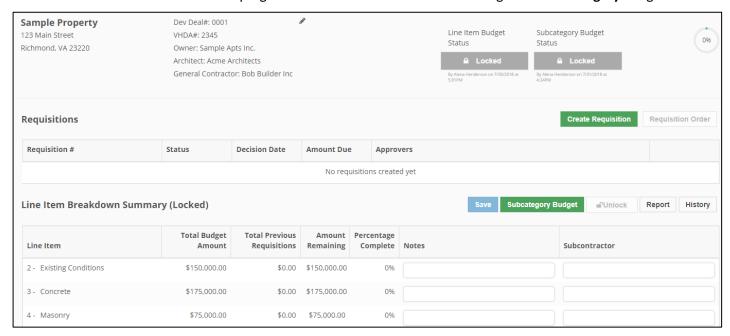
The requisition process is as follows:

- The contractor or contractor's staff creates and initiates a requisition.

- The users with an approver role review and approve or reject the requisitions.

- After the budget has been requisitioned until it is nearly completed, a user with designated permissions will create a close out requisition for all remaining funds and retainage releases.

3.2. Budget Summary and Requisitions

After the line item and subcategory budgets are both locked, you can begin creating requisitions to initiate draws on the budget.

A Requisitions grid and the **Create Requisition** button appear on the main budget page when both budget levels are locked. You can see progress to date on both the **Line Item** budget and **Subcategory** budget.

Sample Property
123 Main Street
Richmond, VA 23220

Dev Deal#: 0001
VHDA#: 2345
Owner: Sample Apts Inc.
Architect: Acme Architects
General Contractor: Bob Builder Inc

Line Item Budget Status: 🔒 Locked (By Alena Henderson on 7/30/2018 at 5:01PM)
Subcategory Budget Status: 🔒 Locked (By Alena Henderson on 7/31/2018 at 4:24PM)
0%

Requisitions [Create Requisition] [Requisition Order]

Requisition #	Status	Decision Date	Amount Due	Approvers
No requisitions created yet				

Line Item Breakdown Summary (Locked) [Save] [Subcategory Budget] [Unlock] [Report] [History]

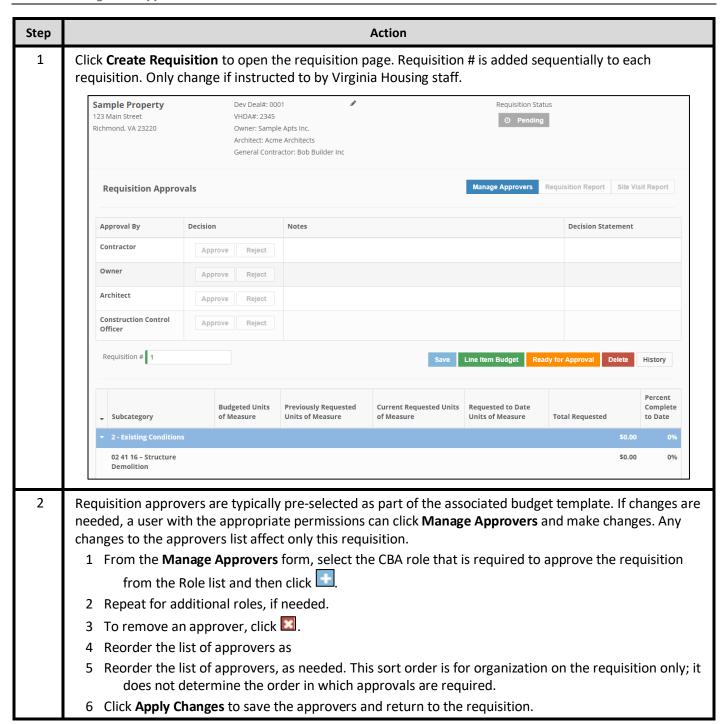| Line Item	Total Budget Amount	Total Previous Requisitions	Amount Remaining	Percentage Complete	Notes	Subcontractor
2 - Existing Conditions	$150,000.00	$0.00	$150,000.00	0%		
3 - Concrete	$175,000.00	$0.00	$175,000.00	0%		
4 - Masonry	$75,000.00	$0.00	$75,000.00	0%		

The budget can have multiple requisitions in **Pending** and **Submitted** status, but they must be approved in order by all signers. If the order must be altered, contact the Administrator.
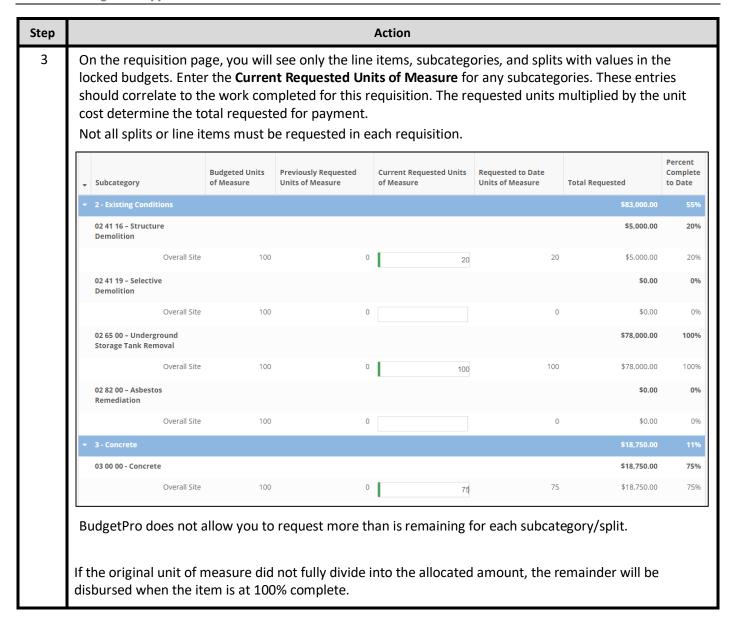
Requisition #	Status	Decision Date	Amount Due	Approvers
1	Approved	7/17/2018	$69,197.01	Approved by Alena Henderson (VHDA - Profile) on 7/17/2018 ✓ Approved by Alena Henderson (VHDA - Profile) on 7/17/2018 ✓ Approved by Alena Henderson (VHDA - Profile) on 7/17/2018 ✓ Approved by Alena Henderson (VHDA - Profile) on 7/17/2018 ✓
2	Rejected	7/18/2018	$6,528.96	Rejected by Alena Henderson (VHDA - Profile) on 7/18/2018 ✗ Awaiting approval from (Owner) Awaiting approval from (Architect) Awaiting approval from (Construction Control Officer)
2	Approved	8/9/2018	$16,206.25	Approved by Alena Henderson (VHDA - Profile) on 8/9/2018 ✓
3	Submitted		$8,689.83	Awaiting approval from (Contractor)
5	Pending		$0.00	

Requisitions Grid	
Column	**Description**
Requisition #	Sequential number determined by the application. The number can be edited.
Status	• **Pending**—Open to edit the requisition • **Submitted**—Requisition is submitted to the approvers for review • **Approved**—Approved by all approvers • **Rejected**—Rejected by at least one approver. A rejected record automatically creates a new record with the same values as a pending status. **Rejected records are hidden from the grid but can be viewed by using the button at the top of the grid.** 👁 Rejected
Decision Date	Date when all approval or rejection decisions have been received
Amount Due	Total amount requisitioned
Approvers	If the requisition is Submitted, each role required to approve is listed. If the requisition is Approved, each user who approved is listed, along with the date of approval.

3.3. Create and Submit a Requisition

Users with the appropriate permissions can create, edit and submit a requisition. The contractor can assign staff to do this without giving them the authority to approve a requisition.

Step	Action
1	Click **Create Requisition** to open the requisition page. Requisition # is added sequentially to each requisition. Only change if instructed to by Virginia Housing staff.
2	Requisition approvers are typically pre-selected as part of the associated budget template. If changes are needed, a user with the appropriate permissions can click **Manage Approvers** and make changes. Any changes to the approvers list affect only this requisition.

> 1. From the **Manage Approvers** form, select the CBA role that is required to approve the requisition from the Role list and then click ➕.
> 2. Repeat for additional roles, if needed.
> 3. To remove an approver, click ❌.
> 4. Reorder the list of approvers as
> 5. Reorder the list of approvers, as needed. This sort order is for organization on the requisition only; it does not determine the order in which approvals are required.
> 6. Click **Apply Changes** to save the approvers and return to the requisition.

Step	Action
3	On the requisition page, you will see only the line items, subcategories, and splits with values in the locked budgets. Enter the **Current Requested Units of Measure** for any subcategories. These entries should correlate to the work completed for this requisition. The requested units multiplied by the unit cost determine the total requested for payment. Not all splits or line items must be requested in each requisition.

Subcategory	Budgeted Units of Measure	Previously Requested Units of Measure	Current Requested Units of Measure	Requested to Date Units of Measure	Total Requested	Percent Complete to Date
2 - Existing Conditions					**$83,000.00**	**55%**
02 41 16 – Structure Demolition					$5,000.00	20%
Overall Site	100	0	20	20	$5,000.00	20%
02 41 19 – Selective Demolition					$0.00	0%
Overall Site	100	0		0	$0.00	0%
02 65 00 – Underground Storage Tank Removal					$78,000.00	100%
Overall Site	100	0	100	100	$78,000.00	100%
02 82 00 – Asbestos Remediation					$0.00	0%
Overall Site	100	0		0	$0.00	0%
3 - Concrete					**$18,750.00**	**11%**
03 00 00 - Concrete					$18,750.00	75%
Overall Site	100	0	75	75	$18,750.00	75%

BudgetPro does not allow you to request more than is remaining for each subcategory/split.

If the original unit of measure did not fully divide into the allocated amount, the remainder will be disbursed when the item is at 100% complete.

Step	Action
4	Indirect costs such as General Requirements, Profit and Overhead are calculated automatically based on a rounded down percentage of completion of line items. Hover over the item title to see the details related to the disbursement of these items. Any requisitions for other indirect costs such as Bonds/LOC Premiums are added manually as needed. Hover over the item title to see the details related to the disbursement of these items. Retainage held and released is calculated based on the settings selected for this budget. Contact your Construction Control Officer with any questions related to the settings. | Total Structures	$101,750.00	
31 - Earthwork	$0.00	0%
32 - Exterior Improvements	$0.00	0%
33 - Site Utilities	$0.00	0%
Total Land Improvements	$0.00	
Groups Subtotal	$101,750.00	
General Requirements	$5,879.80	
Overhead	$3,116.27	
Profit	$6,232.61	
Bonds/ LOC Premiums		
Tap Fees		
Soil Borings		
Building Permits		
A Test		
Total Line Items / Subcategories Requested	2 / 3	
Total Requested	$116,978.68	
Retainage Held	($11,697.86)	
Retainage Release	$0.00	
TOTAL AMOUNT DUE	$105,280.82		
5	Click **Save** at any time to save your work and return to complete the requisition at a later time.
6	When the requisition is complete and ready for the approval phase, click **Ready for Approval**, and then click **Submit** to confirm. **Save** **Line Item Budget** **Ready for Approval** **Ready For Approval Confirmation** × Are you sure you want to designate this Requisition as ready for approval? **Cancel** **Submit** Sample Property 123 Main Street Richmond, VA 23220 General Contractor: Bob Builder Inc This locks the requisition and sends an email to each collaborator with an approver's role.

Step	Action
7	The **Ready for Approval** button changes to **Pull Back for Edits** after the requisition is submitted for approval. During the approval period, clicking **Pull Back for Edits** clears any approvals and allows you to edit the requisition and resubmit it for approval. This option is available only until all users have approved or one user has rejected the requisition. [Save] [Line Item Budget] [Pull Back for Edits] **Note:** Sometimes the web browser needs to be refreshed to see this button after submitting for approval. If an edit is needed after all approvals are completed, contact the Administrator.

3.4. Create a Progress Completion (PC) Report

The **Progress Completion Report** (PC Report) gives a detailed view of what work is being requested for a given requisition. The Progress Completion Report displays the progress to date for any subcategory and splits within the requisition. This report is designed to provide a quick view of the requested units of measure while inspecting the work in place prior to approving the requisition.

Step	Action
1	Select **View Budget** on the appropriate budget from the **Budget List**.
2	Click **View Requisition** for the requisition you want to create the report for.
3	Click **PC Report** to download a PDF version of the report. The report shows only the line items and subcategories requested in the selected requisition. Each row shows the work to date and highlights in yellow where the units of measure have been increased. To see the progress status of all line items and subcategories, use the **Subcategory Summary Report.**

Group #		LINE ITEM - Budget Amount	Total Amount of This Requisition	Total % Completed to Date	Overall Site To Date	Bldg 1 - 34 To Date	Bldg 2 - 39 To Date
% Complete to Date	Total Meas. Units	Subcategory	Requisition Amount	Units Complete to Date	Units Complete this Req.		
2 Existing Conditions -		$101,000	$16,913.60	17 %			
50 %	100	02 41 13 – Selective Site Demolition	$15,000.00	50	50	50		
46 %	87	02 41 19 – Selective Demolition	$163.60	40	40	40		
50 %	100	02 42 00 - Removal and Salvage of Construction Material	$1,750.00	50	50	50		
6 Woods, Plastics and Composites -		$83,087	$23,610.96	28 %			
100 %	34	6-1	$23,610.96	34	34		34	
7 Thermal and Moisture Protection -		$23,113	$23,113.00	100 %			
100 %	100	7-1	$23,113.00	100	100	100		
		Total Structures	$63,637.56				
		Line Items Total Requested	$63,637.56				

3.5. Approve or Reject a Requisition

If you are designated as an approver on a requisition, you will receive an email when the requisition has been indicated as Ready to Approve. Although multiple users may be assigned the same role on a workcenter, only one user per role needs to approve. All approvers must approve to authorize a requisition for disbursement. Approved requisitions draw down on the budget.

Step	Action
1	Click the link in the email. • If you are logged into Procorem, the link takes you directly to the requisition. • If you not logged into Procorem, the link takes you to the login screen. After logging in, the app takes you to the requisition. OR Log into Procorem and navigate to the WorkCenter, select **Construction Budget**, and then navigate to the appropriate requisition in Submitted status.
2	Review the requisition and the **Progress Completion Report**. If your role is an approver, one of the rows in the **Requisition Approvals** grid is active with **Approve** and **Reject** buttons.

Step	Action
3	Click **Approve**. The approval form opens. The form includes the statement you are attesting to. An electronic signature replaces a wet signature as your formal approval of the requisition. 1 You can change your organization name, which is pre-populated based on your **Procorem Profile**, if needed. 2 Enter any notes you want to add with your approval. You can edit the notes at any time. 3 Click **Approve** if you authorize this requisition. Until all approvers have responded, you can change your decision to **Rejected**. OR Click **Reject**. The reject form opens. 1 You can change your organization name, which is pre-populated based on your **Product: Procorem** profile, if needed. 2 You must enter information related to the rejection in the Notes field. You can edit notes at any time. 3 Click **Reject** to indicate that you do not approve this requisition. 4 If one approver rejects the requisition, the Procorem BudgetPro application duplicates the requisition in an open, pending state with the same requisition number so that modifications can be made and resubmitted. The rejected version is closed and saved. Notes related to the rejection are saved for historical purposes. If any approver rejects, all approvers must respond again when the requisition is resubmitted. To see all requisition records, including Rejections, click ⊙ Rejected at the top of the Line Item Budget page.
4	Approvers receive email notification when the requisition reaches a final state of approved or rejected. notifications@mail.procorem.com to me, jeff.reynolds, Josh.holloway, sergio.gambale ▼ **procorem** CBA Test User Test Project - Jeff Requisition #1 has been approved. Please navigate to the corresponding Procorem WorkCenter to review as necessary. **View Requisition** Thanks for choosing Procorem to collaborate and stay productive. Let's get to work! All of us on the Procorem team Read our blog	Got questions? Procorem	98 Inverness Drive East, Suite 250, Englewood, CO 80112
5	If a fully approved requisition needs to be edited, contact the Administrator.

3.6. Create a Close-out Requisition

When a project is nearing completion and the final draw is ready to be dispersed, users with the appropriate permissions can create a close-out requisition. This process creates a final requisition for the budget for:

- All un-requisitioned units of measure for all subcategories
- Any remaining budget amounts for indirect cost line items

If there are no pending or submitted requisitions, the **Close Out** button is active on the main budget page. When you click **Close Out**, review the confirmation message and click **Close Out** again to proceed with the close-out requisition.

Close-out requisitions do not require approvals or hold any retainage. Creating a close-out requisition moves the completion percentage to 100%, thus closing the budget, and the **Create Requisition** button is no longer active.

3.7. Delete a Requisition

If a requisition is a **Pending** state, you can delete the requisition, if you have the appropriate permissions. After the requisition is **Submitted** or **Approved**, you can delete only the most recent requisition because of calculation dependencies on earlier requisitions.

If, for example, the budget has four requisitions approved, and you need to delete the third requisition, you would need to delete the fourth requisition before you can delete the third requisition.

4. Budget Reports

You can create the following reports from within Procorem BudgetPro.

4.1. Trade Payment Breakdown Report

From the main budget page, you can create a **Trade Payment Breakdown Report** that lists all line items available in your template. You can use this report to review or to include with any contractual closings.

Step	Action
1	Click **View Budget** in the list of budgets.
2	From the main budget page, click **Report** to download a PDF version of the report.

4.2. Subcategory Summary Report

The **Subcategory Summary Report** helps you track progress made to date for project work done at the subcategory level. The report shows all information in the subcategory grid at the time you create the report. If the Line Item is locked, only items with associated funds are displayed.

Step	Action
1	Click **View Budget** in the list of budgets.
2	Click **Subcategory Budget** to open the subcategory budget.
3	Click **SC Report**, and then select one of the following options, to download a PDF version of the report: • **All**—Show all budget subcategories • **Remaining**—Show only the budget subcategories with funds remaining

4.3. Requisition Report

The **Requisition Report** includes summary and detail information about a requisition. If created before fully approved, it will indicate DRAFT and approval section will not be included. After all approvals are entered, the report includes a list of the approvers with their decision statements to serve as digital signatures for the requisition.

Step	Action
1	Click **View Budget** in the list of budgets.
2	Click **View Requisition** for the requisition you want to create the report for.
3	Click **Requisition Report** to download a PDF version of the report. The button is available on fully approved requisitions.

4.4. Progress Completion (PC) Report

The **Progress Completion Report** (PC Report) gives a detailed view of what work is being requisitioned for a given project. This report is designed to provide a quick view of the requested units of measure while inspecting the work in place prior to approving the requisition.

The report shows only the line items and subcategories requested in the selected requisition. Each row shows the work to date and highlights in yellow where the units of measure have been increased. To see the progress status of all line items and subcategories, use the **Subcategory Summary Report**.

Step	Action
1	Click **View Budget** in the list of budgets.
2	Click **View Requisition** for the requisition you want to create the report for.
3	Click **PC Report** to download a PDF version of the report.

4.5. Pencil Req Report

The **Pencil Req Report** gives a detailed view of the subcategory budget overall and a printed version of what is displayed on the screen.

Step	Action
4	Click **View Budget** in the list of budgets.
5	Click **View Requisition** for the requisition you want to create the report for.
6	Click **Pencil Req Report** to download a PDF version of the report.

5. Submitting Draw Package

5.1. Submitting the Draw Package

Once the requisition is fully approved in BudgetPro, the owner can create the draw package to submit to Virginia Housing. Not all users within Procorem have access to upload or view files within the workcenter.

The draw package can be compiled into a PDF or loaded as separate files.

Step	Action
1	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.
2	Click to open the appropriate folder. Screen will display all files included in this folder. Click **Upload Files** at the top of the screen to add one or more files.

Step	Action
3	A new window will appear. Click on **Choose File** to gain access to your Windows Explorer to select the file from your computer. Or drag and drop from your computer Home / Virginia Housing Development Authority / Sample - Construction / draw1 / Upload Files **⬆ Select Files** Drag and drop multiple files using Internet Explorer 10+, Firefox, Chrome, or Safari OR Choose File Status Final ▼ + Click plus to add a new status. Manage statuses in Account settings. Type Construction Draw ▼ + Click plus to add a new type. Manage types in Account settings. Description Draw Package #1 Include a description for all uploaded file(s) Comment Please disburse as discussed. Comments will be included in email alerts sent to other collaborators. You may load one or more files at a time. Although not required, you may choose status = Final and type = Construction Draw. 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 all users that you uploaded a file.
4	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. A message will also appear in your activity feed on the Home page. You will be returned to the folder. You should see your file there.
5	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 to delete it.

Step	Action
6	Once your files are uploaded, an email will automatically go to all users notifying them that the file(s) are available. You will also receive a copy of this email.

The following file(s) were uploaded to the **Sample - Construction** WorkCenter. (Virginia Housing Development Authority)

\draw1\Sample File.xlsx

"Please disburse as discussed. "

-- Alena Henderson

Visit WorkCenter

Thanks for choosing Procorem to collaborate and stay productive.

Let's get to work!
All of us on the Procorem team

Read our blog | Got questions? | Connect!

Step	Action
7	Staff at Virginia Housing will access the work center and download a copy of the file. You will see that who downloaded files from the Activity Feed when you first log into Procorem.

My Activity Feed

Activity Feed   Pending Items (0)

All Activities ▾

⚑ Flag

Alena Henderson downloaded a version of the file a few seconds ago on (Aug 09 2018)

XLS **Sample File.xlsx**

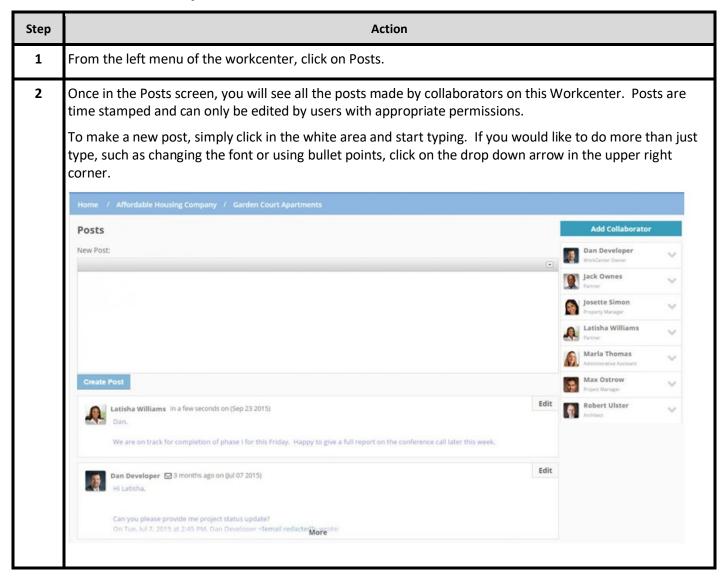🗐 Virginia Housing Development Authority   ⠿ Sample - Construction

6. Using Posts to Communicate

6.1. What are posts in Procorem?

Procorem serves as a comprehensive portal for all your project communications. Fully integrated with email notifications, Procorem tracks project decisions to ensure all team members stay on the same page.

6.2. How to use posts?

Step	Action
1	From the left menu of the workcenter, click on Posts.
2	Once in the Posts screen, you will see all the posts made by collaborators on this Workcenter. Posts are time stamped and can only be edited by users with appropriate permissions.

To make a new post, simply click in the white area and start typing. If you would like to do more than just type, such as changing the font or using bullet points, click on the drop down arrow in the upper right corner.

Step	Action
3	All collaborators on the workcenter will receive an email notification that a post has been made. The email will contain the content of your post.
	A post was recently added to the **Sample - Construction** WorkCenter. (Virginia Housing Development Authority).
	This is a test of the posting function.
	--Alena Henderson
	View Post
4	To respond to this post, you can view the post and enter the workcenter and respond there.
	OR
	You can reply directly from your email account by responding to the Procorem Post Email. Although these responses are hard to read in the activity feed, only the text will display within the workcenter.

For access to the Procorem standard user guide for BudgetPro, navigate to https://budgethelp.procorem.com/.