Accounting

Accounting/Finance

AC050  Financial Reporting Overview
+  This course is an overview of financial reporting options available in Voyager. After a brief presentation of each tool, we will open the course to a question and answer session geared towards helping users streamline financial reporting.

AC131  Voyager Bank Reconciliation
◆  Learn how Voyager helps make the bank reconciliation process easier. This course will cover bank account setup, bank reconciliation features, processes, reports, and troubleshooting.

AC133*  Troubleshooting Bank Reconciliation
◆  Learn the troubleshooting basics of the Bank Reconciliation feature in Voyager. We’ll review the Bank Reconciliation Exception report and discuss the correct procedure regarding when and how to create adjustments. We’ll also discuss when Check Book Maintenance and the Unpost Bank Reconciliation functions are appropriate to use, and examine the importance of the Merge Deposit function in the Bank Reconciliation process.

AC160  Financial Analytics
◆  Voyager contains powerful reporting tools to view financial data in a variety of ways. In this course, we will review how to obtain overview and detailed reports; break down financials by GL segments, property attributes, account trees, and GL books; and export reports to PDF and Excel with the click of a button. We will also cover enhanced reports with data marts and built-in real-time query optimization, and how to drop reports on an executive dashboard for a top-down view of your portfolio. (2 part session)

AC165  Segmentated Accounting in Voyager 7S
◆  Have you been looking for a way to create financial reports that reflect more detail without adding GL accounts to your Chart of Accounts? If so, GL segments may just be for you and your company! You can use GL segments to record and store GL data in categories, which allows you to create financial reports with more detail than ever before. This course will be taught in Voyager 7S and will cover setup, new features, security, and reporting.

AC206  New AP Functions in Voyager 7S
◆◆  Curious about what’s new in the world of Accounts Payable in Voyager 7S? Then this class is for you! We will discuss functions such as AP Templates, Commit/Process Payments, and AP Configuration. Prerequisite: Introduction to Voyager 7S and/or a basic understanding of Voyager 7S. It is not required, but is suggested, to take this class paired with AC207 - New AR Functions in Voyager 7S.

AC207  New AR Functions in Voyager 7S
◆◆  Curious about what’s new in the world of Accounts Receivable in Voyager 7S? We will discuss functions such as a quicker way to enter Charges and Receipts and the new ledger cleanup functionality. Prerequisite: Introduction to Voyager 7S and/or a basic understanding of Voyager 7S. It is not required, but is suggested, to take this class paired with AC206 - New AP Functions in Voyager 7S.

AC208*  New Core Functions in Voyager 7S
◆◆◆  In this class, we will cover new features from the Voyager 7S core suite of plug-ins introduced over the last year. This class does not cover vertical specific new functionality and is recommended for those who are currently using Voyager 7S or plan to upgrade to Voyager 7S.

Icon Legend

BASIC

INTERMEDIATE
Knowledge of the program or subject matter covered in the course is recommended before attending these sessions.

ADVANCED
In-depth knowledge of the program or subject matter covered in the course is recommended before attending these sessions.

TARGETED FOR USERS

TARGETED FOR EXECUTIVES

SALES DEMONSTRATION

INDUSTRY INFORMATION

FOCUS GROUP

NEW COURSE

UPDATED COURSE

This schedule is for informational purposes only and is subject to change at any time.
Accounting

AC210  Introduction to Account Trees
Account trees are powerful financial reporting tools that enable you to determine the format and description of your GL accounts at run time. Discover how this feature can save you time by streamlining and customizing your report writing processes.

AC215  Multifamily Management Fees with Cross Entity Trans
Explore Voyager’s Management Fee functionality and the enhancements it offers over the Pay Commission functionality. Learn how to let Voyager track and calculate your management fees, create payables on a recurring basis, and about new functionality to book AR on your corporate books for the pending income!

AC220  Month End Processing for Residential
Attend this course to master the tools you need to properly complete an Accounting Month-End (AME) closure. You will learn the steps necessary to ensure accurate financial position reporting, look over sample AME checklists, and have an opportunity to reevaluate your own month-end procedures.

AC230  Residential GPR Explained
This course explains the setup and intricacies of the Gross Potential Rent (GPR) report and Post GPR Journal Entry function, and reviews corresponding effects on the general ledger. Learn how to troubleshoot GPR tie-out issues and gain knowledge that will ensure accurate reporting of your financial position.

AC235  Prepay Setup & Troubleshooting
Proper setup of the Voyager prepay functionality is critical to the most efficient and effective use of your receivables system. Join this course to learn the recommended setup and how to troubleshoot resident/tenant prepay issues.

AC237  Month End Tie-Outs: AR, Security Deposits, & AP
Month end is a hectic time for accounting. In this class, learn some useful tips and troubleshooting tools to help complete month-end tasks.

AC241  Voyager 7S Intercompany
Learn about the advanced Intercompany features introduced in Voyager 7S. We now offer cash versus accrual basis reporting, as well as the option for HUB versus Flex funding selections.

AC245  Voyager 1099s
This course will review how to generate 1099s and the appropriate flags to set to create the records for 1099 reporting. The instructor will review general setup for Voyager 1099 functionality.

AC250†  Correcting Resident & Tenant Ledgers
Accurate resident and tenant ledgers are essential for successful property management. Attend this course to ensure the accuracy of your books and tie-out process. We will show how to identify and correct errors in resident and tenant ledger balances and spot inconsistencies between ledger and receivable reports. This course does not cover content relevant to HAP or other specialized ledgers.

AC260  Mortgage Accounts Payable
The Mortgage Accounts Payable functionality in Voyager enables property managers to organize, manage, and report on mortgages held by third parties. This course will demonstrate methods of defining a mortgage and the system’s ability to amortize a payment, schedule it, and post it through to the general ledger. We will address the support of multiple escrow line-item payments, optional extra payments to principal, and balloon payments. Topics will also include assigning payables to GL segments, key reports, and the mortgage projection calculator.

AC310  Financial Best Practices in Voyager
The “by design” accounting features built into your Voyager software optimize user efficiency and accuracy with financial reports. Join this course to learn about this and other topics such as general ledger account setup, month-end procedures, charge code definitions, transaction processing, and more. Learn how to apply accounting best practices to your Voyager system. (2 part session)

AC320  GL Allocations
Learn how to use the general ledger tool in Voyager 6.0 to increase your efficiency when allocating income and expenses from source properties/entities to multiple target properties/entities. Discover how Voyager automatically calculates and splits allocations, and creates journal entries based on the percentages that the user specifies.

AC330  Advanced Account Trees
This course will enhance the skills acquired in the Introduction to Account Trees course (AC210). In this supplemental class attendees will learn how to set up more complicated account trees to create more detailed financial statements. The instructor will also demonstrate how to alter the appearance and the totaling of financial statements to accommodate your organization’s unique reporting requirements.

Accounting/Cash Management

EE120  CHECKscan
This course covers the basic features of Yardi CHECKscan, including bank relationship setup, check scanning, and tenant association. It will also cover the basics of daily routines, including checking the Collect Dashboard for any NSF and returned items, as well as the Collect Processor report for the daily transmission of funds.
This course will focus on one-time payments made through RENTCafé. We will cover how to set up ACH and credit cards, demonstrate the process of making payments online, plus show how they are reflected on the ledger in Voyager and the resident services account. This course will also briefly cover the sign up process for recurring payments in RENTCafé. We'll finish up by reviewing daily procedures and reporting. This course complements and is an excellent follow up to RENTCafé Resident Services: Core Functions (EW260).

This course will focus on our new recurring payment system, Payment Manager. We will cover the various setup options available within Payment Manager and how residents can be signed up for recurring payments in RENTCafé and Voyager. It will demonstrate the monthly recurring process and go into related reports and best practices when using automated recurring.

This course will cover Yardi CHECKscan, ACH, tenant-based fees, credit card best practices, and review features built into Yardi software to help optimize user efficiency and accuracy. Join us to learn about best practices for bank reconciliation, administrative functions, funds reporting, as well as other topics related to processing payments.

This course will cover an overview of Yardi’s Procure to Pay solution with emphasis on invoice processing, service contracts, and payments (check and EFT). PAYscan delivers consistent policies, eliminates paper invoices, and facilitates electronic invoicing. Come see the full transaction lifecycle, from PO to scanned invoice to payable to check/EFT. If you’re looking for ways to improve your AP process, this class is for you!

This course provides an overview of Yardi’s Procure to Pay solution. PAYscan delivers consistent policies, eliminates the physical movement of paper, and facilitates electronic invoicing. Come see the full transaction lifecycle - from purchase order to invoice to payable to check/EFT. Learn about dashboards and how to track, monitor, and approve your invoices and purchase orders.

Attend this course to learn about ways to improve your AP process, this class is for you!

This course offers an overview of Voyager service contracts and AP templates. You’ll learn how to manage recurring contracts with vendors at an agreed price and schedule using service contracts, and how to set up templates for creating payables on the fly with AP templates - an improved version of recurring payables. This class will be taught in Voyager 7S and is appropriate for clients using Voyager 7S, clients migrating to Voyager 7S, and PAYscan clients.

Want to become a Yardi PAYscan power administrator? We will teach you methods to unlock the power of Yardi PAYscan and increase your AP department’s efficiency. Learn how to effectively troubleshoot any challenge that your staff will encounter. Explore the latest options in AP configuration that can maximize Yardi PAYscan’s effectiveness. Learn techniques to make query analyzer a valuable tool for you. This class is designed for more technical attendees interested in learning table structure and valuable PAYscan functionality.

If you are a PAYscan administrator, attend this session to learn tips and tricks to increase your AP department’s efficiency. We will cover short cuts to move items through the approval workflows more quickly, accomplish tasks with fewer mouse clicks, and set up the configurations that will help the program better anticipate your users’ choices.

This course provides an overview of Yardi’s off-the-shelf procurement catalog, featuring national partners such as The Home Depot, Grainger, Staples, and others. This class addresses how to create purchase orders from the electronic catalog, Procure to Pay fully automates the entire AP process, from purchasing to invoice processing to payable creation, with fully customizable, role-based approval workflows. If you are interested in improving the efficiency of your procurement processes, this class is for you!

This course provides an overview of Yardi’s newest solution focused on helping our clients manage their important relationships with vendors. VENDORCafé is an add-on to Yardi’s Procure to Pay solution and provides a portal capability that allows vendors to submit W-9s, COIs, and other documents required for vendor operations, as well as to submit invoices. The vendor on-boarding process is supported by automatic loading of vendor information to Voyager. From an invoice processing perspective, the portal will allow the vendor to submit invoices to the client for payment, view invoice approval status, and gain insight to payment information.
**Affordable Housing**

**AF060**  RENTCafé Affordable Housing Roundtable

- RENTCafé Affordable Housing (formerly HOUSINGCafé) provides extended resident and prospect portal features to affordable housing providers. Join a discussion with your peers to learn how this product helps improve the prospect and resident experience while reducing the cost of compliance. [50059, Tax Credit]

**AF100**  Spotlight on Affordable Housing

- Join us for a discussion of recent and upcoming product changes. This session will be a great foundation for the affordable housing courses scheduled this week. We will highlight important features to be aware of within the 50059, Tax Credit, Rural Development, and HOME programs that could help streamline your organization’s processes. [All Subsidy Types]

**AF101**  Voyager Affordable Housing New Features

- Looking for an update of the latest Voyager Affordable Housing functionality? Join us for a review and discussion of the newest enhancements now available. [All Subsidy Types]

**AF112**  RENTCafé Affordable Housing New Features

- RENTCafé Affordable Housing (formerly HOUSINGCafé) continues to evolve. Join us to learn about the newest features and functions now available. [All Subsidy Types]

**AF115**  RENTCafé Affordable Housing Applicant Workflow

- Interested in automating your extensive onsite compliance interviews, or allowing potential applicants from out of town to complete them conveniently from home? Check out this overview of RENTCafé Affordable Housing (formerly HOUSINGCafé) from the applicants’ point of view to learn just how simple compliance interviews have become! [All Subsidy Types]

**AF135**  RENTCafé Affordable Housing Site Manager

- This course will explore and demonstrate the features and work processes designed to manage applications after prospects have completed their application online. From initial applications, to annual recertifications, you will see how your RENTCafé Affordable Housing (HOUSINGCafé) experience seamlessly ties into your Voyager program. [All Subsidy Types]

**AF150-1**  Affordable Housing Waiting List: Setup

- Attend this course to learn how to set up and use the Affordable Housing waiting list. Course topics include basic setup and usage, preference setting, waiting list reporting, application selection, as well as applicant record logs and updates. We will also demonstrate useful tools to help import a waiting list into Voyager. [All Subsidy Types] (Part one of a two part class)

**AF150-2**  Affordable Housing Waiting List: Workflow

- Repayment agreements are a growing part of managing Section 8 properties since the mandate of Enterprise Income Verification (EIV). This course discusses the current state of repayment agreements and demonstrates how repayment agreements are made much easier with the Repayment Agreement feature in the Affordable Housing program. This feature allows users to track repayment agreements and associated expenses, and automates monitoring and forwarding collections to HUD. In the first part of this three-part session we will review setting up repayment agreements. [50059] (Part one of a three part class)

**AF180**  Understanding the 50059 Workflow

- HUD released TRACS version 202D on August 1, 2014. Learn how recent changes to the 4350.3 and 202D MAT guide affect the 50059 workflow. This course discusses new required data elements, changes to existing elements, and the elimination of unused elements. This course also reviews the revised forms 50059 and 50059A. We will also discuss changes to the Affordable Housing workflow. [50059]

**AF201**  Affordable Housing Best Practices

- In this course we will share the best practices our support team has discovered while working with our clients over the years. We will discuss the tools within Voyager to help your company be more efficient and effective. [All Subsidy Types]

**AF218**  Introduction to Affordable Housing Letters & Forms with FillDocs

- Use Word to create, customize and fill letters, notices, leases, and other compliance related correspondence. In this introductory class you will learn the basics of creating a Word template file for verification letters and notices, the use of tokens to pull data from Voyager, and how to find lists of pre-defined tokens. [All Subsidy Types]

**AF227-1**  Repayment Agreements: Setup

- Repayment agreements are a growing part of managing Section 8 properties since the mandate of Enterprise Income Verification (EIV). This three-part course discusses the current state of repayment agreements and demonstrates how repayment agreements are made much easier with the Repayment Agreement feature in the Affordable Housing product. This feature allows users to track repayment agreements and associated expenses, and automates monitoring and forwarding collections to HUD. In the first part of this three-part session we will review setting up repayment agreements. [50059] (Part one of a three part class)

**AF227-2**  Repayment Agreements: Workflow Part 1

- Repayment agreements are a growing part of managing Section 8 properties since the mandate of Enterprise Income Verification (EIV). This three-part course discusses the current state of repayment agreements and demonstrates how repayment agreements are made much easier with the Repayment Agreement feature in the Affordable Housing product. This feature allows users to track repayment agreements and associated expenses, and automates monitoring and forwarding collections to HUD. This is the second of three parts, in which we will review setting up repayment agreements. [50059] (Part two of a three part class)
AF227-3 Repayment Agreements: Workflow Part 2

Repayment agreements are a growing part of managing Section 8 properties since the mandate of Enterprise Income Verification (EIV). This three-part course discusses the current state of repayment agreements and demonstrates how repayment agreements are made much easier with the Repayment Agreement feature in the Affordable Housing product. This feature allows users to track repayment agreements and associated expenses and automates monitoring and forwarding collections to HUD. This is the third of three parts, in which we will discuss troubleshooting common mistakes and addressing incorrect postings. [50059] (Part three of a three part class)

AF236 Unit Transfers & Gross Rent Changes

Unit Transfers and Gross Rent Changes are not always straightforward and correcting mistakes can be challenging. This session will discuss best practices for both processes. We will cover proper usage of the functions, recommended configuration, and tips to avoid mistakes. We will also explore the proper way to correct mistakes when they do occur. [All Subsidy Types]

AF240-1 Solving HAP Voucher Issues: Part 1

This is a continuation course of Tax Credit workflow best practices and property setup within Voyager Affordable. This class will further discuss maintaining compliance through the use of the Compliance Monitor, NAUR Toolbox, and available tax credit-specific reports including State PSR reports and other online state reporting. [Tax Credit] (Part two of a two part class)

AF240-2 Solving HAP Voucher Issues: Part 2

Learn to detect and resolve common issues that arise during the creation and submission of HAP and TRACS vouchers. We will discuss common and not so common issues, their resolution, and prevention. This class will last two sessions and attendees should plan on attending both Part 1 and Part 2 for complete understanding. [50059] (Part two of a two part class)

AF260-1 Affordable Housing Tenant Ledger

Clean-Up: Part 1

One of the lesser known and used features of Voyager Affordable is its ad-hoc reporting capabilities. This course will introduce Affordable Ad-Hoc Reporting and explore various ways to craft reports for those unusual situations that lie outside the capabilities of standard reports. [All Subsidy Types]

AF260-2 Affordable Housing Tenant Ledger

Clean-Up: Part 2

Accurate resident ledgers are essential for successful property management. Attend this course to ensure the accuracy of your books and the tie-out process. Course attendees will learn how to identify and correct errors in resident ledgers and inconsistencies between ledger and receivable reports. This course focuses on handling subsidy charges and payments. This is a three part class and attendees should plan on attending all three for a complete understanding. [All Subsidy Types] (Part two of a three part class) Prerequisite: AF218 (Affordable Letters & Form with FillDocs: Part 1)

AF260-3* Affordable Housing Tenant Ledger

Clean-Up: Part 3

Accurate resident ledgers are essential for successful property management. Attend this course to ensure the accuracy of your books and the tie-out process. Course attendees will learn how to identify and correct errors in resident ledgers and inconsistencies between ledger and receivable reports. This course focuses on handling subsidy charges and payments. This is a three part class and attendees should plan on attending all three for a complete understanding. [All Subsidy Types] (Part three of a three part class)

AF270-1 Tax Credit Best Practices: Part 1

This course teaches you the best practices and setup of tax credit properties within Voyager Affordable Housing. Learn about recertification waiver implementation, rent restrictions that differ from income restrictions, the new Tax Credit Rent Change function for utility allowances, and discuss necessary monthly and annual tasks that ensure continued compliance. [Tax Credit] (Part one of a two part class)

AF270-2 Tax Credit Best Practices: Part 2

This is a continuation course of AF270-1, covering Tax Credit workflow best practices and property setup within Voyager Affordable Housing. This class will further discuss maintaining compliance through the use of the Compliance Monitor, NAUR Toolbox, and available Tax Credit-specific reports including State PSR reports and other online state reporting. [Tax Credit] (Part two of a two part class)

AF290 Affordable Housing Ad Hoc Reporting

One of the lesser known and used features of Voyager Affordable Housing is its ad-hoc reporting capabilities. This course will introduce Affordable Housing Ad Hoc Reporting and explore various ways to craft reports for those unusual situations that lie outside the capabilities of standard reports. [All Subsidy Types]

AF291* Understanding Affordable Housing Analytic Reports

Join us for a deep dive into some of the popular compliance reports available in Affordable Housing analytics, specifically including Certification Listing, Max Rent Audit, Unit Mapping, and Wait List. [All Subsidy Types]

AF318 Advanced Affordable Housing Letters & Forms with FillDocs

Use Word to create, customize, and fill letters, notices, leases, and other compliance-related correspondence. In this advanced class you will learn how to set up your Tax Credit Lease, combine many separate documents into a single report package, as well as additional advanced features available using FillDocs. [All Subsidy Types] (This course is a follow up to AF218)

AF320 Affordable Housing GPR & AR Tie-Out

If tracking Gross Potential Rent (GPR) at your Affordable Housing properties is important to you, this course is a must. Course attendees will benefit from an explanation of the Affordable Housing GPR specifications by program type, differences between GPR and accounts receivable reports, precise reconciliation processes, and common troubleshooting techniques. [All Subsidy Types]
**Affordable Housing**

**AF330**  Developing Affordable Housing Processes & Workflows
- Have you seen the Voyager Affordable Housing monthly procedures quick menu? Would you like to create your own with built-in step-by-step instruction, links to training videos, and documents? This class will provide instruction on creating custom quick menus for Voyager users and facilitate an open discussion to share ideas and tips for optimizing your organization’s workflows and procedures. Also, learn how to stay informed of new Affordable Housing features, reports, and permission changes. [All Subsidy Types]

**AF920-1**  Current & Pending
- **HUD Policy Changes: Part 1**
  - In the past year, HUD introduced changes that impact your operations. Join Mary Ross for a high-level review of those changes and a discussion on how to maintain compliance. (Part one of a two-part class) [50059]

**AF920-2**  Current & Pending
- **HUD Policy Changes: Part 2**
  - In the past year, HUD introduced changes that impact your operations. Join Mary Ross for a high-level review of those changes and a discussion on how to maintain compliance. (Part two of a two-part class) [50059]

**AF950-1**  EIV Income Discrepancies: Part 1
- While most of us have a handle on the EIV requirements, industry professionals still struggle with the EIV Income Discrepancy Report. This session focuses on this single EIV Report. Learn how to read the report and how to address individual discrepancies common to elderly properties. [Part one of a two-part class][50059]

**AF950-2**  EIV Income Discrepancies: Part 2
- While most of us have a handle on the EIV requirements, industry professionals still struggle with the EIV Income Discrepancy Report. This session focuses on this single EIV Report. Learn how to read the report and how to address individual discrepancies common to elderly properties. [Part two of a two-part class][50059]

**AF970-1**  Annual Certification, Interim Certification, & Termination: Part 1
- Join us for an up-to-date discussion of the AR process including use of the new extenuating circumstances codes. This class also includes a review of the IR process including how to handle challenging scenarios such as teachers who receive income 9 of 12 months, residents who fail to report income, and residents who get a job, quit the job, then get another job.

**AF970-2**  Annual Certification, Interim Certification, & Termination: Part 2
- Join us for an up-to-date discussion of the AR process including use of the new extenuating circumstances codes. This class also includes a review of the IR process, including how to handle challenging scenarios such as teachers who receive income 9 of 12 months, residents who fail to report income, and residents who get a job, quit the job, then get another job.

**VAUG**  Voyager Affordable User Group
- The Voyager Affordable User Group is a forum where users can network, train, and share practices across the compliance industry. Join our subject-matter experts and industry leaders for discussions centered around the compliance industry and the Voyager Affordable Housing product.

**Commercial**

**OIFG**  Office/Industrial Focus Group
- Join members of the commercial support and development teams along with your peers from the office/industrial market for an open discussion on topics such as best practices strategies, leasing process efficiencies, interactive stacking plans, and more, including what is in the development track for future releases. Attendance at this Focus Group is limited to clients currently using the Yardi Office and Industrial products.

**RFG**  Retail Focus Group
- This is a roundtable discussion-format session that provides a unique opportunity to interact with product management and development to help influence future product direction. This group is specifically targeted to the retail markets. Attendance at this Focus Group is limited to clients currently using the Yardi Retail products.

**CM**  Commercial New Development
- **Preview & Recap**
  - This course is a review of the most important changes in the past 6–12 months and a preview of upcoming changes in the next year to the Commercial Product Suite. We will provide a synopsis of the updates discussed at the Office/Industrial and Retail Focus Groups.

**CM045**  Yardi Smart Energy Suite for Commerical Properties
- Utility expenses are the largest source of operating expenses under your control. Discover how the Yardi Smart Energy Suite can help you reduce administrative costs of managing your utility bills, automatically run your HVAC plant more efficiently, recover revenue through submetering and tenant billing, shop for cheaper electricity, and easily file data with ENERGY STAR and GRESB.

**CM050**  Spotlight on Commercial & Investment Management
- Join this course to learn about the Yardi Commercial Suite, designed to help reduce business cycle times and drive workforce efficiency. This course provides a brief introduction to Yardi Advanced Budgeting & Forecasting, Commercial LeasingPad, Orion Business Intelligence, COMMERCIALCafé and Procure to Pay. We will also discuss the product roadmap for Investment Management, which includes InvestorPlus and Investor Portal.
We will demonstrate how Commercial LeasingPad automates activities related to all of your customer and leasing pipeline data.

We will review how to leverage the strengths of a browser-based platform and optional parameters for custom requirements.

This course will teach you how to set up the retail system, track tenant retail sales, and charge overage (percentage) rents.

Yardi Matrix

This course covers the use of Yardi Matrix as a decision-support tool that facilitates multifamily investment transactions by proactively identifying acquisition and new development candidates. Learn how our mapping technology enables you to visualize both the geography and your investment criteria. See how loan maturity information, detailed unit mix data, sales comps, rent comps, and NAA expense data can be used to estimate valuations and populate an acquisition model, enabling you to pick the needle in the haystack and avoid unprofitable time pursuing incompatible deals. (This course covers the same material as RM070)

CM110 Basic Lease Administration & Setup

Explore the commercial lease management functionality in Voyager and discover how easy it is to set up properties, buildings, floors, and units, as well as customers, leases, amendments, and other options. We will review the system’s unique commercial view and leasing workflow, and attendees will walk familiar with the setup fundamentals necessary to fully utilize system features.

CM135* Commercial Month-End Processes

This course will provide a review of month-end processes recommended for Commercial module users, including financial reporting and tie-out, applying credits, commercial billing, management fees, closing the period, and more.

CM140 COMMERCIALCafé

COMMERCIALCafé is your company’s online marketing presence for tenants and prospects. Provide greater visibility of available leases and promote properties for sale, while integrating corporate brand identity and messaging. Additionally, provide tenants with best-in-class services through access to online payments, tenant statements, and all insurance policies are up-to-date.

Prerequisite: CM110 (Basic Lease Administration & Setup)

CM150 Basic Recoveries

Join this course to learn how the Voyager recovery toolset helps users accurately process CAM recoveries. The instructor will review recovery reconciliations and tenant charge schedule adjustments using our intuitive toolset and straightforward reconciliation function. Prerequisite: CM110 (Basic Lease Administration & Setup)

CM165* Leasing Lifecycle & Commercial Workflows

This course provides an overview of the leasing lifecycle and commercial workflows from start to finish. Take your commercial deal or prospect through an activated amendment and up to move-out accounting.

CM171 Commercial LeasingPad: Mobilize Your CRM

Yardi Commercial LeasingPad centralizes valuable customer and contact information in a single, global database. This course will review how to leverage the strengths of a browser-based platform designed for the tablet, and will provide real-time access to all activities related to all of your customer and leasing pipeline data. We will demonstrate how Commercial LeasingPad automates the leasing process from lead generation to lease execution by capturing the relevant data through each step of the process.

CM180* Tax & Insurance

The Tax and Insurance function of Yardi Voyager allows you to track information about tax parcels and insurance policies related to properties, vendors, customers, owners, and leases. Tax and Insurance helps you manage your responsibilities and ensure that all tax liabilities are paid and all insurance policies are up-to-date. Prerequisite: CM110 (Basic Lease Administration & Setup)

CM201 Introduction to Voyager 7S

Discover Yardi Voyager 7S, the company’s first cross-browser release. Learn how the new navigation features and ability to work on multiple platforms - from PCs to iPads - enhance the user experience. Discover the next generation of Yardi Voyager. (PH201 and RM201 will cover the same material)

CM205* Commercial Best Practices

Get the most out of your Voyager Commercial experience by utilizing best practices recommended by our Professional Services Group. Discussions on Commercial Analytics, tasks and notification automation, report packets, custom tables, ad hoc reports, and more.

CM230 Advanced Lease Administration

Learn how to manage long-term leases in your database with lease administration in Voyager 6.0. This course will cover advanced administration tools for modifying, expanding, contracting, renewing, and re-measuring. Prerequisite: CM110 (Basic Lease Administration & Setup)

CM231 Retail Calculations & Reporting

Learn how to manage long-term retail leases in your database with lease administration in Voyager 6.0. This course will teach you how to set up the retail system, track tenant retail sales, and charge overage (percentage) rents. Prerequisite: CM110 (Basic Lease Administration & Setup)

CM240 Orion Business Intelligence for Commercial

Discover how Orion Business Intelligence provides a browser-based business intelligence platform to report on your entire portfolio. This course will introduce the Orion BI platform built from your Voyager database, and review tools such as SQL Server Reporting Services and SQL Server Analysis Services. Topics covered include: interactive and configurable dashboards that show key performance indicators, history, trending, and the use of Excel to create your own custom Business Intelligence reports.

CM250 Straight Line Rents

Learn how to implement FASB 13 and automate straight-lining of rents in Voyager’s Commercial module. This course will cover features associated with basic configuration, calculation of amortization schedule, journal entries, and reporting. Topics include best practices for scenarios such as setting up a lease that has been straight-lined in another system, early renewals, early terminations, retroactive amendments, and optional parameters for custom requirements.
### Commercial

<table>
<thead>
<tr>
<th>Course Code</th>
<th>Course Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CM260</td>
<td>Reporting &amp; Other Features</td>
<td>Attend this course to learn how to use the commercial analytic reports, including the dynamic tenancy schedule. The instructor will cover other features in Voyager Commercial, such as costs/inducements. Prerequisite: CM110 (Basic Lease Administration &amp; Setup)</td>
</tr>
<tr>
<td>CM270</td>
<td>Commercial Ad Hoc &amp; Utilities</td>
<td>Learn how to utilize tools that simplify the life of a lease administrator or property manager by accomplishing daily tasks in bulk. The instructor will demonstrate how to create custom ad hoc reports that allow you to report on standard data, user defined fields, and custom tables. Prerequisite: CM110 (Basic Lease Administration &amp; Setup)</td>
</tr>
<tr>
<td>CM331*</td>
<td>Advanced Retail Calculations &amp; Reporting</td>
<td>This class will provide in-depth training on the powerful retail percentage rent calculations in Voyager, along with the associated reporting capabilities. Prerequisite: CM150 (Basic Recoveries)</td>
</tr>
<tr>
<td>CM340*</td>
<td>Advanced COMMERCIAL Café</td>
<td>The class will cover Tenant Portal configuration and administration, including configuration settings, customizing tenant portal menus, using security groups to restrict available menus, work order field configuration, concierge management, and registration management. Prerequisite: CM150 (Basic Recoveries)</td>
</tr>
<tr>
<td>CM350</td>
<td>Advanced Recoveries</td>
<td>This course covers the more advanced recovery scenarios, such as fixed and variable percentage gross-ups, multiple anchor deductions, CAP increases, and property/tenant and transaction-level adjustments. This course also covers the new Voyager 7S Advanced Recoveries functionality. Prerequisite: CM150 (Basic Recoveries)</td>
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### eLearning

<table>
<thead>
<tr>
<th>Course Code</th>
<th>Course Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>eLFG</td>
<td>eLearning Focus Group</td>
<td>Whether you are new to Yardi eLearning or are an experienced power-user, your ideas and opinions are extremely valuable for the success of our future platform and content development. We are devoting some time during the conference to hear how you're using the eLearning platform to support your training initiatives. We'd also like to hear what aspects of the program you'd like to see us develop further. Our roundtable discussion spans two Friday morning sessions so you can pop in, say hello, and share your ideas in person before leaving the conference! Attendance at this Focus Group is limited to clients currently using the Yardi eLearning product.</td>
</tr>
<tr>
<td>eL040</td>
<td>Yardi eLearning</td>
<td>Deliver strategic and on-demand training while reducing your administrative drag. With Yardi eLearning, your company can design and implement a comprehensive training program that combines live event management and self-paced training in a platform that integrates with your helpdesk software, virtual meeting spaces, HRIS, and company identity database. Take advantage of Yardi’s catalog of over 400 customizable courses that will help you implement, upgrade, and standardize your software and soft skills training. Join us for a tour of Yardi’s eLearning University.</td>
</tr>
<tr>
<td>eL050*</td>
<td>What’s New in Yardi eLearning</td>
<td>Catch up with 12 months of rapid development in this one-hour tutorial about eLearning new features. We will look at how to leverage the new robust test functionality and customizable formatting options, as well as exciting new integrations that bring together your help desk software and virtual meeting spaces, such as GoToWebinar and WebEx. We’ll also take a look at a number of features that make your life as the eLearning administrator easier.</td>
</tr>
<tr>
<td>eL140*</td>
<td>Course Authoring Tools in Yardi eLearning</td>
<td>Maximize your training ROI by fully utilizing the Yardi eLearning solution. Discover how easy it is to quickly develop courses on a variety of topics or modify courses from Yardi’s catalog to meet your training initiatives. In this one-hour authoring challenge, we will take an internal policy document and turn it into an eLearning course that features engaging student interactions, a full procedural tutorial, quiz questions, and a final exam, all with a clean, modern look.</td>
</tr>
<tr>
<td>eL150*</td>
<td>Implementation &amp; User Management Strategies in eLearning</td>
<td>Managing users in an LMS can be time consuming, but it doesn’t have to be. Learn how to use Yardi eLearning tools to save you time and customize the platform. Pull more information into user accounts using user fields and leverage them throughout the platform for reporting and visibility purposes. Set up strategic groups to automatically deploy curricula and empower supervisors to take control of their employee’s learning. We’ll also look at how to set up notifications for both students and administrators to avoid daily reporting and keep you focused on what matters most: the learning and development of your users.</td>
</tr>
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### CTI/Insight

<table>
<thead>
<tr>
<th>Course Code</th>
<th>Course Title</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>CT211</td>
<td>New Features in CTI 9.2</td>
<td>This course describes some of the new features that will be included in the next release of CTI.</td>
</tr>
<tr>
<td>CT250</td>
<td>CTI Enhancements &amp; QA Roundtable</td>
<td>Join this roundtable, which includes CTI developers, to discuss the enhancements planned for the next release of CTI. We welcome you to bring a list of desired future enhancements for suggestion.</td>
</tr>
<tr>
<td>TIDMA</td>
<td>CTI Users Group</td>
<td>This session is for users of CTI.</td>
</tr>
</tbody>
</table>
A Day in the Life of an eLearning Administrator

Managing users in an LMS can be time consuming, but it doesn’t have to be. Learn how to use Yardi eLearning tools to save you time and customize the platform. Pull more information into user accounts using user fields and leverage them throughout the platform for reporting and visibility purposes. Set up strategic groups to automatically deploy curricula and empower supervisors to take control of their employee’s learning. We’ll also look at how to set up notifications for both students and administrators to avoid daily reporting and keep you focused on what matters most: the learning and development of your users.

Managing Instructor-Led Events in Yardi eLearning

Manage and track all of your live events, whether they are in-person or over the web using Yardi eLearning. Import your webinars from Citrix, Cisco, or Adobe to streamline your virtual meetings and add tests to capture knowledge retention. Limited space? Utilize the waitlist functionality to fill your training seats and let the platform take care of the rest. We’ll walk through the event process from creation to closing attendance!

Proving ROI with Yardi eLearning

Everyone is looking for results, whether students are evaluating their training opportunities or executives are looking at the training bottom line during budgeting season. Spend an hour looking at how you can prove ROI with Yardi eLearning. We will dive into reports and look for statistics on the admin dashboard, in user accounts, hidden within courses, as well as show you how to use eLearning courses and tests to gather relevant data. The next time a question arises, you’ll be prepared.

Fostering a Culture of Learning

Building a culture of learning where users seek out training opportunities and advice may seem near impossible for some companies. But technology and today’s workforce is primed for this shift. Hear from a panel of industry experts and Yardi clients about how technology and online learning can be the hub of a thriving learning culture. Panelists will explore techniques and share stories of success and challenges on their way to building a culture of learning.

Advanced Course Authoring Tools in Yardi eLearning

Are you ready to take your instructional development to a new level? We are going off the map in this session to uncover some advanced techniques that take your eLearning pages beyond the confines of the author toolbar. We will look at advanced usage of tables for formatting content, floating tables, creative linking ideas, hover image reveals, invisible buttons, and auto-play audio. Bring your creative ideas and be prepared to explore the options in this instructional design adventure.

The RENTCafé Experience:

Start Anywhere, Finish Anywhere

This course provides a live demonstration of RENTCafé Connect (formerly Yardi Call Center), RENTCafé CRM (formerly LeasingPad CRM), and RENTCafé Portals. We will touch on insurance, Resident Screening, and RENTmaximizer as they relate to the online leasing workflow in RENTCafé. During class, we will make a live call to the call center from the website, create a guest card, pick up the guest card in CRM and “show” the unit, go through an online application in RENTCafé Portal, go through RENTCafé resident portal setup, make a live call to the resident call center, and create a work order.

RENTCafé Property Marketing

This course covers RENTCafé property marketing basics with special emphasis on easy-to-implement features that will give your property a strong online presence. We’ll discuss all you need to know to set up your property and go live with a solid marketing website.

RENTCafé Resident Services: CRM & Engagement Features

Learn how to communicate and engage with residents using Resident Services through Site Manager. We will discuss bulletin boards, announcements, events calendar, user management, the Resident/Community page, email and SMS management, and reputation management, all at the introductory level.

RENTCafé Online Leasing Workflow

Maximize the potential of RENTCafé Online Leasing. This course will cover available features available to customize your online presence for prospective applicants. Course attendees will learn about online leasing fundamentals, as well as recommendations for optimizing applicant workflows, lease generation, reviewing end-to-end online leasing, and other items to help generate leads.

RENTCafé Marketing Strategy

You’ve built your websites, now what? The RENTCafé Marketing Strategy class looks at how to align your marketing initiatives with consumers’ intent and expectations. This class will review current trends in multifamily marketing, social media best practices, and how to increase leads.

RENTCafé Search Marketing

RENTCafé Site Manager has a full set of features to support your search marketing efforts. Learn more about the tools available to boost both your search engine optimization efforts and return from paid marketing campaigns. This course will help you take your marketing site to the next level by diving into what to optimize, how to improve engagement, and where to measure results.

RENTCafé Resident Services: Core Functions

Learn how to maximize resident retention through RENTCafé Resident Services. Course attendees will receive an overview of payment settings including text-to-pay, maintenance requests, lease renewal, concierge features, page narratives, tooltips, and much more. This course complements and is an excellent follow-up to Online Payment Processing (EE260).
Marketing

EW320† RENTCafé Advanced Property Marketing
This course covers a wide range of advanced features that are not covered in our standard RENTCafé Property Marketing course (EW130). These features are directed at improving the prospect experience, integrating social media, and customizing your marketing sites. This course is intended for savvy marketers who want to dig into advanced options for managing their online presence.

EW330 RENTCafé Advanced Online Leasing Workflow
The RENTCafé Online Leasing advanced functionality offers a wide range of features that surpass the fundamentals covered in our standard RENTCafé Online Leasing class (EW170). This course is intended for individuals familiar with RENTCafé Site Manager and Online Leasing and will expand beyond the workflow into setup and configuration best practices. The material will include an overview of online leasing-related settings and include features such as applicant invites, applicant grouping, and customizing your workflow and appearance.

EW370* Advanced Lease Document Management
Come learn about Yardi’s new, exciting, and powerful Lease Document Management tool. This course is designed to help you master the art of creating lease documents and addenda. We will show you this new tool and how the finished lease documents will work for online leasing through RENTCafé. The new interface is simple, intuitive, and creates a seamless process for your leasing staff, new residents, and lease renewals alike.

EW375* RENTCafé Blue Moon Best Practices
The Blue Moon Online Leasing experience with RENTCafé just got even better. This course will cover the relationship between RENTCafé and Blue Moon, best practices for generating a Blue Moon Lease through Site Manager, new Blue Moon-related features available in site manager, and Blue Moon configuration recommendations.

KT401† RENTCafé CRM: PopCard vs RENTCafé CRM
Thinking of switching from PopCard to RENTCafé CRM (formerly LeasingPad CRM)? This course is designed to help users understand the differences between the two systems. As you make the switch from PopCard to RENTCafé CRM, this course will help you identify areas of efficiency, educate you on the enhanced functionality, and will help facilitate a seamless transition.

KT405* RENTCafé CRM & RENTCafé: Online Leasing Workflow
Join us for an in-depth walkthrough of the online leasing workflow, from both an applicant and property perspective. This includes an applicant’s point of view when applying via a RENTCafé marketing site, as well as the property’s workflow upon receiving and processing the prospect’s application in RENTCafé CRM. During this course we will also review best practices and common FAQs.

KT430 RENTCafé Connect (formerly Yardi Call Center)
RENTCafé Connect (formerly Yardi Call Center) is an extension of your office that captures calls beyond the limits of your onsite team. With a telephone call or Web chat session, residents can enter maintenance and service requests, process rent payments, and make balance inquiries. RENTCafé Connect interfaces directly with Voyager to create guest cards, applications, work orders, receipts, and general messages. Attend this course to learn how RENTCafé Connect can maximize your resident retention and make your marketing dollars go further than you ever thought possible!

KT440* PopCard: Managing Your Queue
This course takes an in-depth look at the RENTCafé CRM (formerly LeasingPad CRM) queue. We will review how to respond to incoming leads, create new guest cards, schedule appointments, and avoid duplicate guest cards. You’ll understand when to follow up with residents and send automated emails. We’ll navigate through the follow up process and help you manage your leads quickly and efficiently.

KT520* RENTCafé CRM: Reporting
Come take a look at your RENTCafé CRM (formerly LeasingPad CSRM) reports! Understand ROI, conversion rates, marketing sources, or listen to call recordings straight from your RENTCafé CRM reporting menu. We’ll take a deep dive into CRM reporting to help you better decide which reports are better suited to fit your needs.

Modules

IMFG Investment Management Focus Group
Join members of the Investment Management client support and development teams along with your peers to discuss industry best practices around investor relations, fund accounting, and administration, as well as investment and investor reporting, performance returns/ attribution analysis, and more. We will also discuss the development track for future product releases. Attendance at this Focus Group is limited to clients currently using the Yardi Investment Management products.

MA Investment Management New Development Preview
Attend this course for a review of the most important changes to the Yardi Investment Management product suite in the past 6–12 months and a preview of upcoming changes in the next year. The course is a synopsis of the updates provided to the Investment Management Focus Group.

MA030 InvestorPlus
Discover how InvestorPlus improves the effectiveness of your client-facing staff. This introductory course will cover how configurable, role-specific dashboards put investor and investment data at a fund manager’s fingertips as well as how 360° access to contacts, activities, leads, proposals, and investment opportunities aid the deal makers. Learn how to communicate with investors and track activity via Outlook integration, correspondence, and notes.
 Modules

MA150  Introduction to Yardi Advanced Accounting
- This course covers how to produce consolidated financial statements above the property level. You will learn how to set up entities, build ownership structures, and create consolidation entries with eliminations. This course also includes minority interest and equity pick up rules as well as how to use segments for intercompany eliminations within the roll up hierarchy.

MA160  Investment Management Reporting & Utilities
- This course goes into depth on how Investment Management analytics and reports gather investment accounting data and how to configure your own custom and specific IM report templates. The second half of this class covers the setup and use of investor contact management and YSR to generate investor-facing correspondence. Examples will include Distribution Notices, Capital Call Letters, and Investor Summary Statements.

MA200  Introduction to Investment Management
- Automate the complex accounting transactions of fund management to dramatically reduce the analysis required by traditional accounting. Investment Management allows you to manage your whole-owned assets, joint ventures, and other investment types for both small and large portfolio investors. Topics include setting up complex investment structures as well as tracking cash flows and capital activity between investor and investment.

MA215  Investment Management Standard Performance
- Our standard performance course will show you how to use calculator analytics to calculate and store performance returns for your properties and assets including portfolio returns. We will focus on NCREIF as an industry benchmark and how you can use the YSI calculator rule sets to generate these returns. Prerequisite: MA200 (Introduction to Investment Management)

MA310  Advanced Investment Management
- This advanced course dives deeper into the Investment Management product, covering topics such as commitment recalculation, capital calls, income allocation, management fees, distribution reinvestment, and how to set up tax withholding rules. Unfunded equity, time adjusted IRR, and NAV based analytics will also be covered in this course. Prerequisite: MA200 (Introduction to Investment Management)

MA312*  Advanced Features for Investment Management
- Learn how to configure the system and structures to facilitate multicurrency transactions, accounting, and consolidations through accounts and options, accounting books, legal entities, exchange rates, and translation and revaluation rules. We’ll also cover creating batch transactions to match specific exchange rate needs, constructing journal entry rollups to match desired reporting results, and calculating returns in investor or investment currency. Prerequisite: MA200 (Introduction to Investment Management)

MA315  Investment Management Advanced Performance
- This course will focus on calculating and storing investor/investment returns in our IMKPI tables using capital transaction records from IM. We will cover returns in investor or investment currency and review how to calculate and store the various attributions (composites) required by your firm or your clients. The course will review GIPS as well as how to create your own investor/investment return calculations. Prerequisite: MA200 (Introduction to Investment Management)

ABFFG  Advanced Budgeting Focus Group
- This session will take place in two parts. In part 1, listen to a panel of your industry peers as they discuss company best practices, implementations, and use of Yardi Advanced Budgeting & Forecasting. In part 2, join in an interactive session where you can help influence future product development. Attendance is limited to clients currently using the Yardi Advanced Budgeting & Forecasting product.

MB*  ABF New Development Preview
- Attend this session to learn about the new developments planned for the Advanced Budgeting, Forecasting and Valuations modules over the next 6–12 months.

MB112  Budgeting & Forecasting
- Learn how to accurately and efficiently populate budget worksheets with projected values based on various sources, including historical GL or budget data, future-scheduled rent posting, recurring payables and journal entries, and market leasing assumptions. Course topics include re-forecasts, variance analyses, and analytic reporting during the budget period.

MB120  Introduction to Advanced Budgeting
- This class will include a high level overview of the Advanced Budgeting & Forecasting module. We will walk through common budgeting processes as well as discuss best practices for the module. Topics will include an overview of how to manipulate your commercial revenue forecast, functions to help you gain efficiencies in forecasting expenses, features that will help you pull mortgage and job information into your budget, and will close out with some common reports. Note: this course is specific to the Advanced Budgeting & Forecasting product, and does not apply to the Budgeting & Forecasting module.

MB150  New Features in Advanced Budgeting & Forecasting
- As you move forward in your Voyager releases, you may not be familiar with all the new features and functionality that have been added to the Advanced Budgeting & Forecasting (ABF) module. This class will introduce you to these new features to help you increase your productivity, help with reconciliations and variance analysis, and make your budgeting process smoother and more time efficient. Note: this course is specific to the Advanced Budgeting & Forecasting product, and does not apply to the Budgeting & Forecasting module.
**MB210**  
**Introduction to Valuations**

This course will introduce you to Valuations - a powerful calculator used by asset managers and REITs to help you determine present values and IRRs of individual assets using a discounted cash flow model. We will also cover key reports for managing analyses, manual revenue/expense entry, and how to apply market assumptions like simple cap rate entry and general vacancy. Note: this course is specific to the Advanced Budgeting & Forecasting product, and does not apply to the Budgeting & Forecasting module.

**MB230**  
**Advanced Budgeting & Forecasting: Commercial Features**

This course will be a detailed dive into the revenue forecasting for commercial budgets and valuations. Topics include working with model properties and leases, refreshing model data with core unit and lease data, review and modification of leasing assumptions through the rent roll, setting up and modifying recovery information using the quick recovery tool, and linking market leasing assumptions (MLAs) to properties or units. We will also cover some of the commercial-specific reports available in the module. Note: this course is specific to the Advanced Budgeting & Forecasting product, and does not apply to the Budgeting & Forecasting module.

**MB240**  
**Advanced Budgeting & Forecasting: Reforecasting**

This course will cover functionality that will help you in the reforecasting process. We will review various features that allow you to move data into your budget or analysis (for example, historical actuals or budgeted data from a prior quarter), as well as best-practice recommendations. Note: this course is specific to the Advanced Budgeting & Forecasting product, and does not apply to the Budgeting & Forecasting module.

**MB270**  
**Voyager 7S Models & Formulas for Advanced Budgeting & Forecasting**

Learn to wield new front-end formulas in Voyager 7S that increase the ease and accuracy of your budgeting process using our modeling tool. The tool deploys formulas that follow your business rules to calculate and populate accounts on your budget worksheets. Note: this course is specific to the Advanced Budgeting & Forecasting product, and does not apply to the Budgeting & Forecasting module.

**MB280**  
**Advanced Budgeting & Forecasting: Forecast Leasing Options**

This class will cover "FLO" (Forecast Leasing Options), the latest forecasting functionality to help you manage commercial revenue assumptions for vacant units and expiring tenant leases. Benefits from this new feature include: a more efficient interface, less dependence on market leasing assumptions (MLAs), fewer MLAs required, copy revenue assumptions from a prior budget, simple lease renewals, and easy access to modify units. The class includes a demo of functionality, administrative setup, and key reports for this feature. Note: this course is specific to the Advanced Budgeting & Forecasting product, and does not apply to the Budgeting & Forecasting module. Prerequisites: MB230 (Advanced Budgeting & Valuations: Commercial Features)

**MC†**  
**Construction: New Development Roundtable**

During this course, the Yardi staff will showcase the latest features in Voyager for Construction/Job Cost. The session features an open forum for questions on enhancements and other job costing topics. (2 part session)

**MC120**  
**Construction Setup**

This three-part course will cover all of Voyager Job Cost from setup to job close. A tentative guideline for topics in each session is: part 1 - core setup, categories, jobs, and budgets/revisions; part 2 - contracts/COs, retention, JEs, reclass, and JCAs; part 3 - stock reporting, releasing retention, basic forecasting, and job close. (3 part session)

**MC210**  
**Construction Draws & Receivables**

This two part course will review construction AR features. We will cover setup of single and multiple funding sources, creating and submitting draw sheets, tracking receivables, income, and retention. (2 part session)

**MC240**  
**Construction Reporting**

This course will teach how to use the Job Cost Analytics effectively, and show the most popular reports. We’ll also have a discussion on custom job cost analytics and correspondence for creating contracts and request for payment.

**MC320**  
**Construction Forecasting**

This advanced course will cover the Forecasting feature within the Construction module. Topics include calculating cost to complete and projected final costs, as well as cash flow forecasting by job.

**MC270**  
**Legal Module**

Our legal module facilitates efficient management of standard legal activities by providing an easy-to-use framework to stay on top of legal deadlines and other related events. Learn how to set up legal records of various types, create legal notice events, track tenant legal history, and utilize reports.

**MI110**  
**Overview of Yardi Inspection**

Yardi Inspection is a flexible tool for scheduling and managing all types of inspections at commercial, multifamily, public and affordable, government, military, student, single family, condo, and other properties. Clients can easily create custom inspection templates to suit unique business needs, assign inspections based on user-defined criteria, view detailed reports on inspection history, and more. This course will cover the setup and use of this module.
**Modules**

**MI350**  
Inspection: New Features & Committee  
Join this committee of Yardi Inspection product specialists, developers, and users to discuss new features and enhancements for future releases. You are welcome to bring a list of product functions or features you wish to see added.

**MM**  
Maintenance Roundtable  
Join this roundtable of Yardi Maintenance product specialists, developers, and users to discuss new features and enhancements for future releases. You are welcome to bring a list of product functions or features you wish to see added.

**MM112**  
Voyager Work Orders  
This course covers how to use Voyager work orders to manage your maintenance tasks, staff, and materials. Other topics include basic work order capabilities and workflow, managing tasks, tracking inventory and labor, preventive maintenance, and posting transactions to the general ledger. (2 part session)

**MM156**  
Basics of Inventory Control  
This course covers the Yardi Inventory Control module, which greatly enhances the inventory management capabilities of Voyager. We will cover the advantages of using this tool and the process used to set up, manage, and report on your inventory. (2 part session)

**MM157**  
Basics of Fixed Assets  
This course details the Yardi Fixed Assets module. The instructor will review proper module setup and usage, including how to create fixed assets and how to calculate, post, and report on depreciation.

**MM210**  
Maintenance Setup  
This course reviews setup of functions shown in the Voyager Work Orders course (MM112). Topics include maintenance accounts and options, lookup lists, optional parameters, make-ready functions, core inventory, and customizations.

**MM320**  
Advanced Maintenance Functions  
Learn about using Advanced Maintenance, which integrates all of Yardi’s facilities products and includes planned preventative maintenance, Yardi Facilities Manager and Maintenance Manager Mobile. (2 part session)

**MM356**  
Inventory Control: New Features & Committee  
Join this committee of Yardi Inventory Control product specialists and developers to discuss new features and enhancements for future releases. You are welcome to bring a list of product functions or features you wish to see added.

**MM357**  
Fixed Assets: New Features & Committee  
Join this committee of Yardi Fixed Asset product specialists and developers to discuss new features and enhancements for future releases. You are welcome to bring a list of product functions or features you wish to see added.

**MN110**  
NY Module Overview  
Learn how the Voyager New York module assists your company in meeting DHCR regulations. We’ll be demonstrating how to use the dashboard and process DHCR lease renewals and annual rent registrations.

**MN210**  
New Features in the NY Module  
Join us for a demonstration of new and advanced features in the New York module such as MCI, IAI, and new standard reporting.

**MR050**  
Yardi Concierge Roundtable  
Join members of the Concierge support and development teams along with other clients currently using the Concierge products to discuss existing functionality and contribute your ideas and concerns for future releases.

**MR110**  
Yardi Concierge  
Join us to learn about Yardi Concierge, a tablet-optimized module that is becoming increasingly popular. Learn how these features can assist you with guest relations, delivery notifications, guest authorizations, key authorizations, incident reporting, resident away notifications, and the reservation system.

**Multifamily**

**EU050**  
Yardi Energy Solutions Demo  
In this demonstration, you will learn about an exciting product that streamlines utility billing. Yardi Energy Solutions is an automated utility management system that works with electronic invoice processing, providing an end-to-end solution with no interfaces to third-party systems. Yardi Energy Solutions works with master or submetered systems to provide a cohesive tool for managing your utility billing more efficiently.

**EU120**  
Yardi Energy Solutions: Best Practices  
In this session we will explore how decisions made during the Yardi Energy Solutions implementation process will affect utility vendors, recovery, conservation, Voyager financials, and reporting. We will cover key steps and how you can leverage the YES team’s expertise to take advantage of this energy management solution. Learn what you need to know to make informed decisions and set yourself up for success with YES. By adapting and following the YES best practices you will be able to experience smooth and streamlined utility billing and expense management services within your own Voyager database.

**MaxFG**  
RENTmaximizer Focus Group  
Join us for an interactive session where we will share our current roadmap for RENTmaximizer and gain your input on product enhancements you would like to see. All current RENTmaximizer clients are invited to attend and bring suggestions and ideas for product improvements. Attendance at this Focus Group is limited to clients currently using the RENTmaximizer product.
Multifamily

ORMF* Orcion BI for Multifamily Focus Group
- Participate in an interactive session where we invite you to share your experience with Yardi Orcion Business Intelligence for Multifamily. All current Yardi Orcion Business Intelligence for Multifamily clients as well as those interested in learning more about the product are invited to attend. Come prepared with your questions, suggestions and ideas for product improvements.

RIFG Renters Insurance Focus Group
- This focus group is intended to provide clients with an in-depth review of the renters insurance policy programs, and the compliance functionality and analytics available within Voyager. Clients will have the opportunity to share industry knowledge and experience to improve the program and Voyager platform. Attendance at this Focus Group is limited to clients using Yardi Renters Insurance.

RM010 Spotlight on Multifamily
- This course will highlight the latest developments and roadmap of the Yardi Multifamily Suite of products. Attend to get a sneak peek at what is happening with Voyager Residential, the Yardi Marketing Suite (which includes RENTCafé and RENTCafé CRM), Resident Screening, Procure to Pay, and many more. This course will provide insight into other courses you may want to attend for more detailed information in each area.

RM020 Yardi RENTmaximizer
- Learn about Yardi’s approach to rental pricing, enabling you to realize the full benefits of revenue management systems. We will cover pricing methodology and term-based pricing, which allow freedom of choice while optimizing lease terms to smooth out expirations. This trends-based approach to pricing also allows you to recover costs and increase revenue using rules you define.

RM040 Yardi Resident Screening Introduction
- Attend this course to learn the basics of Yardi Resident Screening, lean about the services we offer, our scoring model, and our approach to screening. We will also demonstrate our seamless integration to your Voyager platform and what is involved with implementing the system. The course also provides a comprehensive overview of the features, customization, and analytics that are available.

RM045* Experian RentBureau & Yardi Resident Screening
- Unlock the power of Experian RentBureau rental payment data at your communities. Experian RentBureau is the largest and most widely used database of rental payment information and currently includes data on more than 15 million residents nationwide. From identifying high-quality residents and reducing skips to improving bad-debt recovery, learn how contributing and accessing rental payment history data via Yardi Voyager and Yardi Resident Screening can give you a distinct competitive advantage.

RM070 Yardi Matrix
- This course covers the use of Yardi Matrix as a decision-support tool that facilitates multifamily investment transactions by proactively identifying acquisition and new development candidates. Learn how our mapping technology enables you to visualize both the geography and your investment criteria. See how loan maturity information, detailed unit mix data, sales comps, rent comps, and NAA expense data can be used to estimate valuations and populate an acquisition model, enabling you to pick the needle in the haystack and avoid unproductive time in pursuing incompatible deals.

RM101 The Resident Lifecycle: Prospect to Past
- This course is designed for beginners who are interested in learning about the lifecycle of a resident within the Voyager system. Course attendees will receive a basic overview of the leasing workflow, prospect/resident statuses, renewals, and final deposit accounting.

RM116 Prospect Guest Card & Leasing Workflow
- Want to save time and increase productivity by streamlining your leasing process? Examine the intricacies of Guest Card, Leasing Workflow, and Applicant Screening and how these components affect your occupancy.

RM117 Streamlining Rental Rates
- Learn how the tools provided in Voyager can help you update unit rents easily and efficiently. This course includes instruction on amenity-based pricing, leasing specials, hot sheets, and market surveys.

RM160 ResidentShield Renters Insurance
- Featuring guaranteed policy fulfillment for every resident, ResidentShield renters insurance allows you and your staff to easily manage renters insurance enrollment and compliance. This course provides an overview of ResidentShield renters insurance’s two options, ResidentShield HO4 and ResidentShield Master Policy Program, and will cover topics such as workflow, features, customization, and analytics.

RM201 Introduction to Voyager 7S
- Discover Yardi Voyager 7S, the company’s first cross-browser release. Learn how the new navigation features and ability to work on multiple platforms - from PCs to iPads - enhance the user experience. Discover the next generation of Yardi Voyager. (CM201 and PH201 will cover the same material.)

RM210 Getting the Most out of RENTmaximizer
- This session will cover best-practice settings for a wide range of areas including lease renewal pricing and the various options you have available to you. In addition we will cover demand indicators to give you an understanding of what may work best for your organization. Lastly, you will learn about new and little-known RENTmaximizer features.

RM220 Residential Analytics
- Learn the nuts and bolts of the Voyager operational reporting system by drilling into each section of the box score (availability, resident activity, and traffic) and understanding how they relate to your onsite success. Supporting reports covered will include Conversion Ratios, Unit Availability, Resident Activity, and Traffic Detail. We will also discuss the capability to store portfolio-level Residential KPIs to use for custom reports.
RM225  Lease Renewals

Voyager includes a number of functions that aid the time-consuming and important process of lease renewals. Topics in the course include lease proposal batches, lease expiration dates from the dashboard, bulk approvals, letters, processing renewals, scheduled renewals, and simple renewals.

RM230  Move-Ins & Transfers

Learn in detail the move-in process and how it affects occupancy and GL transactions. This course includes a review of all the system options that reflect how your organization handles security deposits, including the global, property, and unit type options, as well as the effects on physical occupancy (history tables). The course also covers troubleshooting of the move-in process and associated GL transactions.

RM235  Move-Out Process

Learn in detail the move-out process from beginning to end. Learn about notice, cancel notice, move-out, adjust move-out date, cancel move-out, deposit accounting, move-out statement, and adjust deposit account. This course also reviews accounting effects, unit type default move-out charges setups, and the effects on occupancy and history tables.

RM240  Property Takeover & Conversion

When you’re taking over a property, what tools should you use? This course provides training on both the the new Yardi to Yardi (Y to Y) tool, for when the property is coming from another Yardi database, and standard ETL Tools, for when the property is coming from a different system. Whether you are using the Yardi tools or conversions services, there will also be data validation involved. We will cover the common reports that should be used for validating your data.

RM250  Orion Business Intelligence for Residential

Discover how Orion Business Intelligence provides a browser-based business intelligence platform to report on your entire portfolio. This course will introduce the Orion BI platform that is built from your Voyager database. Topics covered include: the creation and use of interactive, configurable dashboards; dashboard content and KPI targets and thresholds; and basic product configuration. Learn how you can use Orion BI to see the trends and performance of your entire business with amazing ease and speed.

RM260  Yardi Resident Screening Best Practices

This course is geared towards current Yardi Resident Screening users looking to maximize their use of the platform. Learn about industry trends and recent product enhancements. The course also provides a brief overview of workflow, features, customization, and analytics. The session will conclude with a brief roundtable discussion about industry trends related to screening and what Yardi Resident Screening can do to help your company manage risk.

RM315  Late Fees

Learn the ins and outs of late fees. This session will include a comprehensive overview, covering setup options, configuring to run automatically at night, and market-specific set ups.

RM340  Residential Best Practices

This course reviews recommended system configurations that optimize the performance of your Voyager system and new features that improve Voyager-related business operations.

PN130  The Voyager 7S Conversion Experience: Before, During, & After

7S is the latest and most advanced version of Yardi Voyager, leveraging software as a service (SaaS) technology and mobile capabilities. Listen to a panel of clients talk about their migration to Voyager 7S, its mobile access and applications, favorite new features, the move to SaaS, and how their business benefits from an ability to expand Voyager with new Yardi products and services.

PN170  The Inside Scoop on Advanced Maintenance

Listen to a panel of clients discuss their experience with Advanced Maintenance. You’ll learn new tips and tricks developed by Yardi experts and your peers, and have the opportunity to ask questions of the panel participants.

PN180  Using RENTCafé: Insider Tips & Client Insights

Hear directly from other Yardi clients about their experiences with RENTCafé. You’ll have the opportunity to ask questions and learn about new tips and tricks developed by Yardi experts and your peers.

PN210  Client Insight on Revenue Management Functionality

Listen to a panel of clients discuss their experiences with the revenue management functionality in Voyager. You’ll learn new tips and tricks developed by Yardi experts and your peers, and have the opportunity to ask questions of the panel participants.

PN320  The Orion BI Experience: A User Perspective

Listen to a panel of clients discuss their experiences with Orion Business Intelligence. You’ll learn new tips and tricks developed by Yardi experts and your peers, and have the opportunity to ask questions of the panel participants.

PN340  Saving Time & Money with Procure to Pay

Clients using the Yardi Procure to Pay (P2P) suite of products will talk about how they save money and time with our centralized platform including automated procurement with Yardi Marketplace, vendor management via VENDORCafé, and invoice processing with Yardi PAYscan. Hear from clients who use the solution on a regular basis and take the opportunity to ask your questions at the end of the session.

PN365  Modernizing Your Traditional Training Program

How many times have you heard the phrase, “I should already know this because it was covered in class, but…”? Maybe it is time to re-think our strategies for transferring critical information to our employees. Join other property management industry training professionals for a peer roundtable discussion on the most effective methods for transforming your traditional training program into one that meets the learning needs of today’s busy workforce.
Peer Roundtables

RT110  New York Roundtable
The New York real estate market has many unique specifications and requirements. Join us for a discussion of this marketplace and how Yardi software provides functionality to meet its needs.

RT150†  Is Your Training Paying Off?
How to Analyze Training Effectiveness
The training you provide is valuable…but can you prove it? Learn how to evaluate your training efforts on a whole new level with key performance indicators and business driver metrics. Join your peers for a roundtable discussion of best practices and techniques to develop results-based training assessments to prove that your training initiatives have impact!

RT165  Driving Process Change
Moving your organization through the process of changing or upgrading software can be a daunting experience. Join this roundtable course to hear how other Voyager users have handled business process change, training, hardware upgrades, outsourcing and other decisions during their software migrations.

RT175  Social Media Roundtable
Implementing an effective and engaging social media strategy is a must-have in real estate. Join us for a roundtable discussion on current social media trends and best practices, while getting your toughest questions answered. We will explore how to use social media to optimize your marketing efforts, boost engagement, and build community online.

RT220  Planning for a Successful Implementation
Making the decision to change software can be a time-consuming and terrifying proposition. Now that you've made your choice, learn how to make the implementation process move as smoothly as possible. This session will be led by the managers of the Yardi Professional Services Group.

RT245*  Industrial Properties Roundtable
The management of industrial properties in Voyager requires use of a unique set of tools and work arounds. Come join this session to learn from Yardi staff and your industry peers.

RT275  Evaluating Your Business Practices
Business process management (BPM) has seen increased interest during the past year, as organizations look to automate and streamline their processes so they can wring out costs and become more efficient. Organizations should gear their BPM initiatives to fit a purpose, such as continuous process improvement, competitive advantage, or business transformation. Attend this roundtable and discuss this important topic with BPM consultants and other Voyager clients.

RT340*  REIT Roundtable
Join this roundtable discussion to discuss the intricacies of REIT operations with your peers.

RT380  DC Rent Control
Join this conversation to share your DC Rent Control solutions with other Voyager clients.

RT410*  Employee Retention Roundtable
Your employees are a huge asset. Discuss ways to retain them once they’re trained up and valuable.

RT425*  Developing Your Workforce:
Creating a Culture of Learning
Nurturing long-term employee development increases productivity, retention, and overall satisfaction. Join your peers for a roundtable discussion of how to create and leverage learning plans to foster employee development and avoid cognitive overload. Key to the success of learning plans is manager buy-in, so we’ll also discuss how to convert managers into partners who are an extension of the learning and development process.

RT430*  Managing Tenant Risk
Join this conversation to discuss with your peers strategies for controlling tenant risk. Topics will include Resident Screening, incident management, renters or tenant insurance (residential and commercial), claims management, and workman’s comp insurance.

RT440*  Integrating Existing & New Modules
Join other self-hosted and SaaS Select clients to discuss the complexities of migrating to Voyager 7S. Topics could include: workflow adaptation, compatibility/interoperability, sharing data with other function groups, and 7S vs. 6.0 components - compatibility, installing plugins, training staff, creating a plan to get it all together.

PHA

PH010  Spotlight on PHA
Yardi’s PHA software contains many useful tools that can significantly increase your staff’s efficiency. This class will spotlight some of the recently released product enhancements. Attend this class to learn about what’s new as well as what’s coming in the near future for the PHA products.

PH145*  RENTCafé PHA:
Waiting List & Application Management
This exciting session will encompass the RENTCafé waiting list processes from initial entry into the system to managing communications with applicants, purging the waiting lists, and accepting online intakes and verifications. This session will include Yardi’s best practice suggestions for successful online waiting list management.

PH147*  RENTCafé PHA:
Tenant & Vendor Management
This course will provide a comprehensive overview of the RENTCafé PHA Tenant and Landlord Portals. Topics will include online rent payments, recertifications, and verifications for tenants. HCV landlords will be able to manage bank accounts, and view inspection and payment history. This session will also include a discussion on future functionality for RENTCafé PHA.
**PHA Overview & Planning for Voyager 7S**

This class is an introduction to the PHA product in Yardi Voyager 7S, Yardi’s first cross-browser Voyager product. We will review the new navigation features and the updated user interface, with a focus on PHA screens. Depending on the features your PHA uses in Voyager, the upgrade from 6 to 7S may require some additional planning, as some feature options have changed. We will discuss these changes during the class so you can understand and plan for them. (CM201 and RM201 will cover some of the same basic material)

**PHA Portability Updates**

This course will provide an overview of the latest changes in Portability for the Housing Choice Voucher program, including the incorporation of the Portability Streamlining Final Rule published in August of 2015.

**PHA Potpourri**

PHA Potpourri provides an opportunity for clients to ask questions about the product that may not fit within the context of other classes offered at YASC. This class is always lively, covers a wide range of topics and is highly interactive.

**PHA Notifications, Tasks, & Email Templates**

Learn how to standardize and automate communications, both internally and externally. Learn how to create standard email templates, schedule database tasks, and automatically send letters and reports using this valuable toolset.

**PHA Demographics & HCV Forecasting Tool**

This session is a review of the newly-enhanced PHA demographics, which have been expanded to encompass all PHA program types as well as the new 2 Year HUD Forecasting tool. This class will review the process for generating the demographic data, as well as how to use the embedded tools to analyze and graphically represent the data. The 2 Year HUD Forecasting tool utilizes RFTA data to populate this critical HUD report to assist agencies in assessing leasing statistics for the Housing Choice Voucher program.

**HUD Update: PIC Replacement**

In April 2015, HUD announced that they are in the process of redesigning and upgrading the Public & Indian Housing Information Center (PIC) for 50058 submissions. HUD staff will be leading this presentation and discussion of the new system.

**HUD Update: Q&A**

This class will be a question and answer session with HUD staff regarding the redesign of the Public & Indian Housing Information Center (PIC) system.

**PHA Users Group**

The Yardi PHA Users Group is open to anyone utilizing the Yardi Public Housing products. Come network with fellow users, learn about the future of the products, and participate in a series of client-led sessions.

**Reporting**

**Reporting Panel**

After a brief overview presentation, this will be a Q&A session with Yardi technical staff about the various reporting options available in Voyager. We will cover everything from simple Yardi scripting to high-end presentations available when using Yardi Orion Business Intelligence. We will also describe the customizations possible with analytics, SSRS, and our ad hoc and Excel tools - both YSL.Net and the increasingly-adopted YSR. We’ll help you make sense of the Voyager reporting options and guide you to the YASC courses you should attend, thus empowering you to make savvy technology reporting decisions.

**Yardi Spreadsheet Reporting Overview**

Yardi Spreadsheet Reporting (YSR) is a Voyager technology that enables advanced report designers to create report packets of individual documents designed in Microsoft Excel or Word. This class will offer an overview of the capabilities of this product, and is designed to help you gain an understanding of how YSR can be used to create boardroom-quality reports.

**Basics of Database Schema & SQL**

Do you want to learn more about SQL queries and the Yardi database structure but don’t know where to begin? Attend this course, which introduces you to the Yardi database tables and educates you about the basics of SQL select statements. This knowledge is also helpful for database maintenance and troubleshooting database-related issues.

**Correspondence for Commercial**

Attend this course to learn about the commercial correspondence feature and how to generate invoices, letters, and statements. This feature is similar to Word mail merge in that a template is used to create an invoice, letter, or statement. Each template pulls specific information from the database.

**Correspondence for Residential**

Use Correspondence for Residential to print or email letters and statements, or to correspond with your residents, property-wide! Unique templates that pull specific database information are used to produce property-wide letters or statements, saving you time and boosting overall efficiency. Attend this course to learn about the Correspondence feature and how to use it to generate all of the letters and statements you need.
Reporting

RE170 Introduction to Custom Financial Analytics
- This course is an introduction to Yardi’s custom analytics and provides information on how to create your own financial analytic-type custom financials. Learn how to create Account Tree and Property Comparison templates using either standard or custom account trees. We will cover topics such as how to compare financial data from prior periods to the current period, and how to compare similar data across multiple properties.

RE180 SSRS Basics for Non-Developers
- This course includes an introduction to Yardi scripting, writing SQL select statements, and the basics of modifying these scripts to interface with SSRS. The class will include a brief introduction to designing and writing RDLC reports. No previous knowledge of report writing is required.

RE220 Populating & Reporting on Standard Performance Tables
- Yardi Voyager includes standard out-of-the-box Residential and Commercial performance tables. Learn how to populate these tables and report off of these key performance indicators.

RE240 YSL.Net & YSL Classic
- Yardi Spreadsheet Link (YSL) is a long established Yardi technology. YSL exists as both Classic (6.0 only) and .Net (Voyager 6.0 and 7S), with both rendering reports into Excel workbooks. It is well suited for authoring richly-formatted property, performance, and financial reports leveraging the power of Excel. This class will illustrate the basics of creating a YSL report, deploying it, and running it from Voyager into Excel, and will touch on advanced reporting techniques. We will also contrast YSL against the features of the newer Yardi Spreadsheet Reporting (YSR) paradigm.

RE250 Using YSR for Custom Analytics
- Leverage the power of YSR and Microsoft Excel to transform Custom Analytics into boardroom-ready reports. This class will teach you how to turn reports created using the custom analytic engine into Yardi’s newest reporting technology, YSR.

RE261 Residential Tenant Letters, Notices, & Leases
- Are you still typing individual letters to your residents or using Mail Merge to send out late notices? This course will provide you with the tools needed to print every letter, notice, and lease directly from Voyager. Learn how to effectively use Property Packets, Correspondence, and FillDocs using standard templates.

RE270 Intermediate Custom Financial Analytics
- This intermediate course builds upon the Introduction to Custom Financial Analytics class (RE170). We will focus on the creation of templates for portfolio-based custom financial reports. Rethink how you analyze your portfolio - learn how to create property portfolio type templates to compare GL accounts between properties or summarized by property attributes, and leverage standard or custom account trees to create attribute comparison type templates.

RE340 Advanced YSL
- This course is for those already familiar with the basics of Yardi Spreadsheet Link (YSL.Net) in Voyager. A rework of the YSL Reports function has further generalized YSL.Net so that advanced users can incorporate any Voyager data into the rendered report from executing SQL, a Yardi SQL script, or a stored procedure, while respecting runtime filter selections. We’ll discuss the newly minted YSL_Records.Net sample, some advanced general design capabilities of YSL, and contrast YSL with YSR, Launch Excel, and other Voyager reporting tools. There will be an open YSL forum for questions and a full exchange of advanced YSL.Net tips and tricks. Prerequisites: RE240 (YSL.Net & YSL Classic)

RE360 Customizing Orion Business Intelligence
- Discover how Yardi Orion Business Intelligence can be tailored to deliver the specific metrics you need to track in order to improve and grow your business. Learn how to integrate custom data into Orion Business Intelligence, build custom metrics, and explore other customization techniques through examination of client-derived case studies. We will walk you through how to identify specific business needs, define necessary metrics, and build solutions using the toolset within Orion Business Intelligence.

RE370 Advanced Custom Financial Analytics
- Custom Analytics in Voyager is a highly versatile report designer. Once you’ve mastered the basics of getting your custom report to screen, Excel, or PDF, move on and learn how to pull feeder data for arithmetical manipulation from other rows and columns, access the total from an account tree expansion, use the Rolling Month and Period to Date functions for deeper flexibility in your customization toolbox, and many other advanced features. We will also discuss tips and tricks for validating designs and correcting errors. Prerequisite: RE170 (Introduction to Custom Analytics)

RE405 Reporting Comparison between YSR & SSRS
- The two main, alternative technologies available in Voyager 7S for rendering boardroom-quality, custom reports will be reviewed and contrasted. Yardi support for custom reports written in Crystal is rapidly approaching end-of-life, so users who have made significant investments in custom Crystal reports could substantially benefit by understanding the pros and cons of each approach. This session is light on technical detail but seeks to educate managers as to how to select between the two approaches.

RE505 SQL Scripting
- This intermediate course will expand your knowledge of select statements, joins, and queries in SQL, the database language that is required for generating custom reports and performing data-mining with Yardi’s SQL scripting functions. Learning these functions will enable you to link tables and fields; convert data formats; and sort, total, compare, and count.
**Technology**

**TE020** Yardi Cloud Services

Join members of Yardi’s Cloud Services team to learn how we’re enhancing the Yardi Cloud for you. We will discuss staffing and service improvements as well as advances in hardware, monitoring, and management tools.

**TE040** Orion Document Management

Orion Document Management provides your company the ability to organize, control versions, store, and secure documents related to company departments or Voyager records such as properties, residents, tenants, jobs, etc. Use full text search to easily find documents based on the name of the document or the text within the document. Additionally publish documents such as tenant correspondence directly into the document management library.

**TE130** Basic Voyager Menu Security

Learn the basics of Voyager menu editor and security. This course covers how to protect and restrict access to data by dividing your Voyager users into security groups, with each security group having a customizable menu set associated with it. Attend this course to learn how to set up security groups, individual users, user access, menu sets, and permissions.

**TE140** Property Attributes & Dynamic Property Lists

Attributes provide a method for searching, selecting, organizing, describing, and classifying your properties or entities. Join us to learn about the set-up involved, as well as how to use attributes to filter reports and create dynamic property lists.

**TE170** New Client Central

Client Central has long been a useful resource for clients to access training and technical information. This class is your opportunity to learn about our recent updates to the Client Central system. Learn how to access our extensive online Knowledge Base, including product documentation, training videos, and other resources. Find out how to create and monitor Yardi support cases and trouble requests (TRs), and manage your Yardi Cloud environment—from accessing performance statistics to implementing Cloud requests and approvals. We’ll also discuss how to administer your Client Central groups, users, and permissions.

**TE180** User-Defined Fields & Custom Tables in Voyager 7S

Voyager 7S provides a variety of ways to customize information collected in the program and to personalize how it appears on the screen. Join us to learn how to enable User Defined Fields for storing additional data, as well as how to create custom tables to control the formatting, field requirements, and layout of a screen containing additional data.

**TE210** Voyager Configuration

Maximize your efficiency by learning how to customize your database so that it contains information specific to your organization’s needs. Course topics include changing field labels and values, creating one-to-many tables, adding custom buttons, and more.

**TE215** System Administration Toolbox

Become familiar with the features in the Yardi utilities toolbox. Learn what each tool does (and doesn’t do), and when to use it. The course also includes a demonstration of the toolbox’s reporting capabilities.

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**Reporting**

**RE540** Yardi Spreadsheet Reporting Technical Session

Yardi Spreadsheet Reporting (YSR) is an increasingly popular Voyager report rendering technology that enables designers to create packets of individual documents authored in Excel or Word. This class will offer a step-through of how to create a YSR report; how to draw data from both Yardi SQL scripts, as well as from the analytic engines of conforming verticals; an overview of the setup techniques for YSR, including how to establish runtime filters and mapping those into the component individual reports; how to use the Yardi Excel add-in to help design reports; a tips and tricks presentation and a review of some newish features in the latest 7S releases; and information about the documentation and how to learn more about YSR.

**RE560** FillDocs

Use Microsoft Word to create, customize, and fill letters, notices, leases, and other compliance-related correspondence. FillDocs enables you to transition your letters and forms from PDF or Crystal reports to Word at your convenience. Many different documents can be assembled into a single print job. This course provides an introduction to FillDocs, with an emphasis on leases, letters, and statements. Prerequisite: RE505 (SQL Scripting)

**RE575** Transitioning from Crystal to SSRS & YSR

Join this class to learn how to transition from Crystal to SSRS. We will address topics on needed software, converting your existing scripts, connecting SSRS to your database, identifying the SQL query, and the Yardi standards for the look and feel of this tool.

**RE580** SSRS Basics for Developers

This course is an introduction to Yardi report writing using RDLC reports. We will cover the basics of the SSRS application, including the easy use of Yardi scripts to create new reports or customize existing ones. This course will focus on modifying Yardi scripts to interface with SSRS reports. Knowledge of Yardi scripting, as well as basic SQL, is assumed. Some examples of modifications are grouping, totaling, and additional formatting.

**RE680** Advanced SSRS Features

This advanced course is designed for people who have been writing Yardi scripts for some time and are familiar with SSRS. Taught by example, the course will include topics on everything you ever wanted to know about drilling down (hyperlinks), passing parameters from scripts to SSRS reports, multi data table reports, and sub reports.

**System Administration Toolbox**

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**TE215** System Administration Toolbox

Become familiar with the features in the Yardi utilities toolbox. Learn what each tool does (and doesn’t do), and when to use it. The course also includes a demonstration of the toolbox’s reporting capabilities.
Technology

TE230  Transaction & Budgets Import/Export
In this course, we’ll discuss the methods for high-volume data entry of transactions through Voyager’s import and export functionality. This is an ideal approach for initial implementation of historical balances, importing trial-balance data from another database, creating transactions from data in an external system, and the importing of budgets across one or many properties.

TE240  Report Runner (Conductor.NET)
This course provides an overview of Report Runner, a back-end report server that replaces Yardi Conductor. Using Microsoft .NET functionality, it runs as a Windows service and offers improved performance over previous report-server versions. Learn how to configure, set up, and operate this utility, including server requirements, reports email processing, exporting reports to Excel and PDF files, batch reports processing, and scheduled analytics reporting.

TE245  Automated Tasks & Notifications
Learn how to set up automated email notifications and tasks based on critical dates or defined criteria. You can automate emails to any contact in the system, including tenants, vendors, owners, and employees. This Voyager feature displays assigned tasks on the user’s dashboard calendar and lets you track the completion date for those tasks.

TE250  Workflows & Workflow Notifications
Experience the full power of Voyager 7S workflows. Workflows are used in all modules and aspects of the Voyager 7S platform. This course explores the many versatile workflow options available. We will cover workflow basics, advanced workflow features, workflow automation, the workflow dashboard, workflow reports, workflow utilities, email templates, and notifications. (2 part session)

TE310  Advanced Voyager Menu Security
Optimize your existing knowledge of Voyager menus and security. This course covers security analytic reports, in addition to the menu editor and security functionality.

TE335  Advanced SQL Scripting
Yardi SQL scripts can be authored to accomplish much beyond simple reporting. This class will explore automating updates, imposing custom validation, using the system scripting tokens, exploiting the version section and other advanced techniques. We’ll conclude with an open discussion to share tips and tricks discovered by the wizards of scripting.

TE360  Voyager Standard Interfaces Overview
The Voyager Standard Interfaces class will provide an overview of the 10+ interfaces currently available as part of the Voyager Multifamily license. Topics covered will include which interfaces are available, what services are provided by each interface, which third party agencies are qualified Voyager interface partners, as well as Voyager setup and configuration.

Vertical Markets

AS050  Voyager Condo, Co-op, & HOA Demo
Representatives from Yardi Client Services, Development, and Sales guide you in discovering how time-saving features in the Voyager association module will help maximize office efficiency. Topics for discussion include correspondence, ad hoc, scheduled charges worksheet, special assessment worksheets, quick units, and quick owners functionality. Attend this demo to learn how these exciting tools can help you to gain more automation for the association management industry.

AS100  Voyager Condo, Co-op, & HOA Roundtable
Join members of the Yardi Condo, Co-op, and HOA support and development teams, along with peers from the condo, co-op, and home owner association industries, for an open discussion of topics such as new features, RENTCafé Condo and CONDO Café Certificates and the future.

AS130  RENTCafé Condo & CONDOCafé Certificates
Yardi’s paperless solution for Homeowner and Condo Associations, CONDOCafé Certificates, allows the association management to leverage their existing Voyager installation to quickly and easily prepare and sell certificates and other documents. We will also demonstrate RENTCafé Condo, which provides association owners and shareholders with the ability to check their real-time ledger balances, make online payments, create and check work order requests, and submit change request forms.

MLFG  Military Focus Group
Join this Focus Group of Yardi Military Housing product specialists and developers to discuss new features and enhancements in future releases. You are welcome to bring a list of product functions or features you wish to see added. Attendance at this Focus Group is limited to clients currently using Yardi Military Housing products.

ML130*  Voyager Military Housing & MILITARYCafé Basics
MILITARYCafé integrates with Voyager Military Housing to provide an online portal for both prospective and current residents. Learn how to manage prospects during the leasing process. We’ll explain how current residents can make online payments, enter work orders, and interact with your property staff via the resident site. Discover how to maximize your use of Voyager Military Housing.

SF055  Single Family Homes: New Features & Committee
Join this committee of Yardi Single Family Homes product specialists and developers to discuss the new features and enhancements in future releases. You are welcome to bring a list of product functions or features you wish to see added.

SF155  Voyager Single Family Homes & RENTCafé Basics
Voyager Single Family Homes works with our Marketing Suite to provide a seamless experience for both prospective and current residents. Learn how to manage prospects during the leasing process and how current residents can make online payments, enter work orders, and interact with your property staff via the resident site. Discover how to maximize your use of Voyager Single Family Homes.
SS050  Survey of Self Storage

Does your organization have Self Storage assets in its portfolio? If so, join this session to learn about Yardi’s exciting products that can help maximize your self storage profitability. This overview will include Self Storage-specific functionality available in both Genesis 2 and Voyager, as well as a presentation on Self Storage-specific market and research data available with Yardi Matrix. We will also take a look at the near-term roadmap for Self Storage management integration with other solutions supported in Voyager. Come learn how you can manage your entire portfolio, including Self Storage, with one powerful system.

ST101*  Student Housing:
   New Features & Committee

Join this committee of Yardi Student Housing product specialists and developers to discuss the new features and enhancements in future releases. You are welcome to bring a list of product functions or features you wish to see added.

ST120  Voyager Student Housing & RENTCafé Student Housing Basics

Voyager Student Housing works with our Marketing Suite to provide a seamless experience for both prospective and current residents and has been designed for the specialized needs of the student housing industry. Learn how to manage prospects during the leasing process and how current residents can make online payments, enter work orders, and interact with your property staff via the resident site. Discover how to maximize your use of Voyager Student Housing.