



Washington, D.C. | May 21-23, 2019

# COURSE DESCRIPTIONS

## Accounting

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- AC050** **Financial Reporting Overview**  
○ Take a closer look at Voyager's financial reporting options! 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 a snap! This course will cover bank account setup, bank reconciliation features, processes, reports, and basic data correction.
- 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 to use the Check Book Maintenance and Unpost Bank Reconciliation functions, and examine the importance of the Merge Deposit function in the bank reconciliation process.

### Icon Legend

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- ★ **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**
- ⦿ **Focus Group**
- **Sales Demonstration**
- ⌘ **Industry Information**
- ✚ **New Course**
- **Updated Course**

*This class list is subject to change at any time.*

Follow the conversation!  
**#YASC2019**

- 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. *(Two-part session.)*
- AC165 Segmented Accounting in Voyager 7S**  
★ Want to increase the detail of your financial reports without adding GL accounts to your Chart of Accounts? If so, GL segments may be the solution you are looking for! Using GL segments to record and store GL data in categories will enable you to add significant new details to financial reports. Please note: if you are planning to take the Voyager 7S Intercompany class (AC241), we strongly recommend this class as a prerequisite.
- AC210 Account Trees: Introduction**  
★★ 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 Automating Management Fees** ■  
★★ 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 learn about new functionality that enables you to book AR on your corporate books for the pending income.
- AC230 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.
- AC231 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.
- AC233 Automatic Bank Reconciliation** +  
★★ Do you do your bank reconciliation manually? Do you wish you could just load a file and get most of your work done in a matter of seconds? Then the Automatic Bank Reconciliation function in Voyager 7S is what you need! Come see a short demo of how the functionality works and how it can make your reconciliation a little speedier and easier.
- AC237 Month-End Tie-Outs: AR, AP, & Security Deposits**  
★★ Month-end can be a hectic time for accounting. In this class, learn some useful tips and troubleshooting tools to help complete month-end tasks easily, smoothly, and without hassle!
- AC241 Voyager 7S Intercompany**  
★★ Learn about newly-available intercompany functionality on Voyager 7S. These features track each relationship with a segment. The course will cover how to set up Voyager 7S-style intercompany, how to create intercompany transactions with this setup, and intercompany reporting. It is recommended that you have a basic understanding of segments before taking this class. AC165 (Segmented Accounting in Voyager 7S) is strongly recommended as a prerequisite.
- 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.

**AC255 Automatic Lockbox Imports & Cash Matching: Introduction** ★★

Do you manually enter receipt payments into Voyager? Do you wish you could have the receipt batch-created and the payments applied to outstanding charges automatically, before you come in every day? Then the automated lockbox imports and cash-matching function in Voyager 7S is what you need! This functionality is available whether you have existing lockbox relationships or if you'd like Yardi to be your full-service lockbox option. Come see a short demonstration and learn how this functionality can make your daily receipt payments quicker and easier. This functionality is designed for commercial property-centric portfolios but can be used for other real estate portfolios.

**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** ★

Accounting features built into your Voyager software are designed to 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, the importance of transaction dates, automating tasks, and optional financial database packages. Learn how to apply accounting best practices to your Voyager system. *(Two-part session.)*

**AC320 GL Allocations** ★★

Learn how to use the general ledger tool in Voyager 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.

**AC340 Account Trees: Advanced Topics** ★★★

This course will enhance the skills acquired in the introductory 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 totaling of financial statements to accommodate your organization's unique reporting requirements. Prerequisite: AC210 (Account Trees: Introduction) or a strong understanding of account trees.

## Affordable Housing

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**AFSP 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 that could help streamline your organization's processes. *[All Subsidy Types]*

**AF060 RENTCafé Affordable Housing Roundtable** ❖

RENTCafé Affordable Housing provides extended resident and prospect portal features to affordable housing providers, residents, and applicants. 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]*

**AF102**    **RENTCafé CRM Affordable Housing: Introduction \***  
★ Join us for an introduction to RENTCafé CRM Affordable Housing. During this class we will take a look at the affordable-specific features of this CRM system, as well as the workflow when the system is integrated with RENTCafé Affordable Housing. *[All Subsidy Types]*

**AF112**    **New Features Update: RENTCafé Affordable Housing**  
★ RENTCafé Affordable Housing continues to evolve. Join us as we discuss the new waiting list functions within Site Manager, customizable compliance page narratives, and detailed reporting for your property management and compliance staff. *[All Subsidy Types]*

**AF115**    **RENTCafé Affordable Housing Applicant Workflow**  
★ Interested in automating your compliance interviews or allowing prospects to complete applications from anywhere? Check out this overview of RENTCafé Affordable Housing from the applicants' point of view. Learn just how easy accurate 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 online applications. From initial applications to annual recertifications, you will see how the RENTCafé Affordable Housing experience seamlessly ties into your Voyager software. *[All Subsidy Types]*

**AF201**    **Affordable Housing Best Practices**  
★★ In this course we will share the best practices our support teams have 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]*

**AF202**    **Local Programs: Introduction**  
★★ Managing multiple compliance programs on a property can be challenging, especially when state, city, and local programs are added to the mix. Join us as we preview a new addition to Voyager Affordable Housing known as Local Programs. In this session we will explore how to manage an unlimited number of compliance programs with conflicting rules, income, and rent limits. Learn how to set up and administer local programs including establishing income and rent limits on a program-by-program or unit-by-unit basis. Discover how applicants are determined qualified or unqualified for any compliance program mix. We will also be looking for your insights and input as we bring this new addition to market. *[Local Programs]*

**AF218**    **Affordable Housing Letters & Forms with FillDocs: Introduction**  
★★ 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 Part 1: Setup**  
★★ As TRACS 203A goes live, HUD now requires that every repayment agreement and its status be reported to TRACS each month. This means that all repayment agreements must be managed in TRACS software (Voyager). This two-part course discusses the current state of repayment agreements and demonstrates how repayment agreements are made much easier with the repayment agreement feature in Voyager Affordable Housing. This feature allows users to track repayment agreements and associated expenses, and automates monitoring and forwarding collections to HUD. We will also discuss changes in repayment processing as a result of TRACS 203A changes. This course is the first of two sessions over which we will review setting up repayment agreements. *[50059] (Part one of a two-part series.)*

## AF227-2 Repayment Agreements Part 2: Workflow



As TRACS 203A goes live, HUD now requires that every repayment agreement and its status be reported to TRACS each month. This means that all repayment agreements must be managed in TRACS software (Voyager). This two-part course discusses the current state of repayment agreements and demonstrates how repayment agreements are made much easier with the repayment agreement feature in Voyager Affordable Housing. This feature allows users to track repayment agreements and associated expenses, and automates monitoring and forwarding collections to HUD. We will also discuss changes in repayment processing as a result of TRACS 203A changes. This course is the second of two sessions over which we will review setting up repayment agreements. *[50059] (Part two of a two-part series.)*

## AF231 Converting to TRACS 203A



This class will discuss how the TRACS 203A version may impact your policies and procedures as well as affect the way you interact with Voyager Affordable Housing. There will be some changes throughout Voyager; this is a way to get familiar with them to make your life easier during the transition. *[50059]*

## AF240 Best Practices for Vouchers



HAP voucher processing is a critical function for 50059 properties. Learn the best practices for posting, correcting, and auditing HAP vouchers in Voyager. *[50059]*

## AF260-1 Affordable Housing Accounting Part 1: Setup



Proper setup of affordable housing accounts is critical to the efficient and effective use of Voyager Affordable Housing. Attend this course to review the best practices setup of affordable housing accounts and how these accounts will affect financials. You will learn how to set up the affordable housing general ledger accounts, including the suspense account, and where to map this information to ensure that monthly activity reflects correctly on financials. *[All Subsidy Types] (Part one of a three-part series.)*

## AF260-2 Affordable Housing Accounting Part 2: Monthly Procedures



Proper monthly procedures can help optimize the performance of Voyager Affordable Housing. Attend this course to learn more about different Voyager options that can enhance monthly processes at affordable properties. You will learn how to use tools for correcting resident ledgers when data entry mistakes occur or when retroactive subsidy adjustments are needed. *[All Subsidy Types] (Part two of a three-part series.)*

## AF260-3 Affordable Housing Accounting Part 3: Reports



Voyager Affordable Housing receivable reports are designed to reflect the financial condition of affordable housing properties. Attend this course to learn about affordable housing receivable reporting options available in Voyager. You will learn about affordable housing receivable reports and how they differ from residential reports. The course also provides an overview of the monthly tie-out process between the sub-ledger and general ledger for affordable housing properties, including a review tool available to troubleshoot tie-out issues. *[All Subsidy Types] (Part three of a three-part series.)*

## AF265 Ending Subsidy +



Do you have a property where you no longer need to track compliance? Join us to understand how to turn affordable housing functionality off by property or by resident with this new procedure. *[All Subsidy Types]*

## AF270 Tax Credit Best Practices



This course discusses 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]*

## AF275 Income Averaging +



As income averaging becomes more defined, Voyager Affordable Housing will help you stay in compliance. Join us to see how Voyager will work with this new minimum set-aside election within LIHTC. *[Tax Credit]*

- AF277 Combining Affordable Housing & New York Modules +**  
★★ This course will review the challenges of managing an affordable property in New York City. Join us as we review some of the setup requirements and recommended procedures to simplify managing these properties. *[All Subsidy Types]*
- AF280 Rental Assistance Demonstration (RAD)**  
★★ Since its introduction with TRACS 202D, the Rental Assistance Demonstration (RAD) program has grown to incorporate conversions from Rent Supplement, RAP, and Mod Rehab subsidy types. In addition, HUD has changed phase-in rules and introduced the concept of negative HAP. Join us to discuss these and other items as we explore RAD changes in TRACS 203A. We will talk about conversion scenarios and the use of new miscellaneous accounting request codes to be used for zeroing first year vouchers, billing for unit rehabilitations, and recovering negative HAP. *[50059]*
- AF286 RENTCafé Affordable Housing Waiting List Features +**  
★★ This course will explore and demonstrate the applicant experience using RENTCafé Affordable Housing to apply to the affordable housing waiting list. We will demonstrate various Site Manager tools including allowing applicant updates, sister property filtering, waiting list ranking, and moving from a waiting list pre-application to a full move-in application. *[All Subsidy Types]*
- AF287 RENTCafé Affordable Housing Site Manager: Admin Tools**  
★★ This course will cover advanced topics and features currently available in RENTCafé Affordable Housing. Join us to get an overview of unique tools and reports to enhance your property manager, resident, and applicant experience. *[All Subsidy Types]*
- AF318 Affordable Housing Letters & Forms with FillDocs: Advanced Topics**  
★★★ 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] (Prerequisite: AF218 - Affordable Housing Letters & Forms with FillDocs: Introduction)*
- AF904 The Latest on HUD Updates +**  
⌘ TRACS 203A was released February 1, 2019, and implementation will continue through June 30, 2019. Mary Ross will lead this class with an introduction to the changes introduced in the TRACS 203A update. *[50059]*
- AF926 All About RAD for Project Rental Assistance Contracts (PRAC) +**  
⌘ Industry expert Mary Ross designed this session for those owner/agents who are interested in or who have closed PBRA RAD deals. This class provides an explanation of the differences between the PRAC and PBRA RAD programs and what to expect. *[50059]*
- AF927 Converting from PHA to RAD +**  
⌘ Join industry expert Mary Ross for a review of the checklist used when converting from Public Housing to PBRA RAD. *[50059]*
- AF932 Receiving & Addressing TRACS Error Messages +**  
⌘ Don't ignore messages from HUD! Join Mary Ross to discuss how to best retrieve and address TRACS errors and messages. *[50059]*
- AF945 Income Discrepancies & Repayment Agreements +**  
⌘ This two-part session provides you with information about the EIV Income Discrepancy Report, how to document the tenant file, and how to set up a repayment agreement when a resident receives an improper payment. Join Mary Ross, industry expert, to understand the best way to handle these new requirements. *[50059]*

# Commercial

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## CMSP **Spotlight on Commercial & Investment Management +**

- ★ Join us following the General Session for a fast-paced tour of the latest commercial and investment management product suites. Learn how Yardi Elevate can improve asset performance by lowering costs, balancing risk, and increasing revenue via in-depth operational data and predictive insights with recommended actions. We'll also touch on what's new in the Commercial Suite, Pulse Suite (formerly the Smart Energy Suite), and the Investment Suite. We'll cover how these suites work with Yardi Elevate to create a comprehensive and versatile system for managing your commercial property portfolio.

## CM000 **How to Maximize Efficiency With Yardi Commercial Products +**

- Learn how to use Yardi's integrated software to improve efficiency within your organization and enhance your bottom line. Get the best out of your Yardi solution set by understanding how Deal Manager, COMMERCIALCafé Tenant Portal, Maintenance, Inspections, Fixed Assets, Job Cost, Advanced Budgeting & Forecasting, Procure to Pay Suite, workflows, and more work together to foster communication within your company and support efficient processing.

## CM020 **Yardi Elevate for Commercial: Introduction**

- Learn about this exciting new suite of asset management solutions designed to elevate asset performance through smarter, integrated solutions for leasing, development, forecasting, and facilities management across office, industrial, and retail real estate. Integrated with Voyager, the Yardi Elevate products have an easy-to-use and engaging user interface purpose-built for the operations teams of a commercial building owner. We will help you identify the target users and understand the value of Deal Manager, Facility Manager, Forecast Manager, and Construction Manager.

## CM030 **COMMERCIALCafé Tenant Portal: Introduction +**

- COMMERCIALCafé Tenant Portal is your company's online tenant services portal. Explore how you can provide tenants with best-in-class services 24/7 through access to online payments, tenant statements, maintenance requests, sales data entry, and other service offerings.

## CM063 **Yardi Elevate Deal Manager for Commercial: Introduction**

- Deal Manager centralizes deal entry, tracking, and approvals in one simple-to-use solution for brokers and asset managers. Ideal for office and industrial clients, Deal Manager significantly improves the workflow of internal and external brokers, while providing enhanced deal pipeline visibility to asset managers. This class will explore the solution's features and the benefits it can provide.

## CM070 **Yardi Matrix for Commercial**

- This course covers the use of Yardi Matrix as a decision-support tool that facilitates commercial 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 tenant information and available space, sales comps, estimate valuations, and population of an acquisition model enable you to pick the needle in the haystack and avoid unproductive time pursuing incompatible deals. *(This course covers the same material as RM070.)*

## CM075 **Yardi Elevate Retail Manager: Introduction +**

- Part of Yardi Elevate, Retail Manager is Yardi's all-new solution built for retail leasing, including space visualization and specialty leasing functionality, all with flexible workflows. This easy-to-use system will equip your leasing agents and property managers to handle all aspects of retail leasing.

**CM080 Yardi Elevate Asset Intelligence for Commercial: Introduction** ★  
● Come get a sneak peek at Yardi's next generation software for commercial business intelligence: Asset Intelligence. Asset Intelligence provides asset management teams real-time financial & actionable operational data to increase revenue and reduce cost.

**CM090 Yardi Elevate Forecast Manager for Commercial: Introduction** ★  
● Part of Yardi Elevate, Forecast Manager connects leasing, asset management, and finance teams to the budgeting process and eliminates back-and-forth emails and out-of-date assumptions. This class will explore the solution's features and the benefits it can provide.

**CM100 New Features Update: Voyager Commercial** ★  
★ This course is a review of the most important new features in the past 6–12 months and a preview of upcoming changes in the next year to core Voyager 7S Commercial.

**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 away 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 Voyager Commercial users, including financial reporting and tie-out, applying credits, commercial billing, management fees, closing the period, and more.

**CM140 COMMERCIALCafé Tenant Portal: Advanced Features** ★  
★ Learn how to deploy the COMMERCIALCafé Tenant Portal web app and the new tenant mobile app to your customers. Advanced features to be covered include payment processing and adding and removing features like concierge, notifications, documents, sales entry, and more.

**CM150 Setting Up Estimates & 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)*

**CM163 Yardi Elevate: Deal Manager Overview & Roadmap** ★  
★ In this session, learn about Deal Manager, see examples of streamlined leasing processes, and participate in the conversation about product directions and roadmap. For context, Deal Manager centralizes deal entry, tracking, and approvals in one simple-to-use solution for brokers and asset managers. This software is ideal for office and industrial clients.

**CM180 Tax & Insurance** ★  
★ The Tax and Insurance function of 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)*

**CM205 Commercial Best Practices** ★★  
★★ Get the most out of your Voyager Commercial experience by utilizing best practices recommended by our Professional Services Group. Topics include commercial analytics, tasks and notification automation, report packets, custom tables, ad hoc reports, and more.

**CM231 Retail Solutions: Introduction** ★★  
★★ Learn how to manage long-term retail leases in your database with lease administration in Voyager. This course will cover advanced administration tools for modifying, expanding, contracting, renewing, and re-measuring. *Prerequisite: CM110 (Basic Lease Administration & Setup)*



**CM250** **Straight-Line Rents**  
★★  
Learn how to implement FASB 13 and automate straight-lining of rents in Voyager Commercial. 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.

**CM305** **Commercial Best Practices: Advanced Topics**  
★★★  
Get even more out of your Voyager Commercial experience by utilizing best practices for special cases recommended by our Professional Services Group. Topics will include mixed-use property setup, attributes, GL segments, creative uses for Yardi leases, management fees, correspondence, and more.

**CM331** **Retail Solutions: Advanced Topics**  
★★★  
This class will provide in-depth training on the powerful retail percentage rent calculations in Voyager, along with a review of retail sales reporting and other key retail features for malls, strip centers, and specialty and small shop managers. *Prerequisite: CM150 (Setting Up Estimates & Recoveries)*

**CM341** **Orion Business Intelligence for Commercial**  
★★★  
Discover how Orion Business Intelligence can be tailored to deliver the specific metrics you need to track to improve and grow your business. 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. Learn how to integrate custom data into Orion Business Intelligence, build custom metrics, and explore other customization techniques through specific examples for the commercial market.

**CM350** **Commercial Recoveries: Complex Features**  
★★★  
This course covers the more complex recovery scenarios such as segmented recoveries, custom denominators, cap/min, recovery-by-unit, periodic (non-annual) recoveries, gross-ups, anchor deductions, and recovery accrual. *Prerequisite: CM150 (Setting Up Estimates & Recoveries)*

**CM355** **Commercial Recoveries: Design Strategies Conventional & Advanced**  
★★★  
Learn how to set up the simplest CAM expense pools imaginable, including the advanced recoveries expense pools (a.k.a. cost distribution). This session will discuss strategic options for expense pools' setup, how to help standardize usage portfolio-wide, and document policies and procedures when using Voyager's CAM module. The course includes a discussion of the pros and cons of conventional vs. advanced recoveries. *Prerequisite: CM150 (Setting Up Estimates & Recoveries)*

**CM360** **Lessee Accounting: ASC 842 & IFRS 16 Accounting Standards**  
★★★  
New ASC (842) and IFRS (16) rules took effect at the end of 2018. These rules may affect your corporate leases and how they are booked on your financials. This includes setting up and then amortizing/depreciating your corporate leases on the balance sheet. Both ASC and IFRS allow for early adoption. Join us to learn more about these new rules and see how Voyager will handle the new rules. *Prerequisite: CM150 (Setting Up Estimates & Recoveries)*

# Construction

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JC **Development Roundtable: Job Cost**  
⦿ This two-hour session is conducted by the Job Cost (formerly Construction Management) development team and will showcase the latest features in Job Cost. The session also features an open forum for discussions on the Job Cost development roadmap and for questions about future enhancements.

JC020 **Yardi Elevate Construction Manager for Commercial: Introduction**  
● Part of Yardi Elevate, Construction Manager provides real-time insight into budget performance and the cost impacts of capital projects and tenant improvements. This class will explore the software's features and the benefits it can provide.

JC120 **Job Cost Basics**  
★ This two-hour session will provide a high-level tour of Job Cost functionality. There will be a little less setup information than in past sessions and more insight into creative uses of Job Cost, including general feature overviews and a discussion of best practices.

JC130 **Yardi Elevate: Construction Manager for Commercial**  
★ Part of Yardi Elevate, Construction Manager shows job cost data in a new way for asset, development, and project managers. With the ability to track milestones, assign risk levels, cost per square foot calculations, and much more, this software takes job data to a whole new level. Vendor analysis and a bidding process rounds out the functionality available in this robust new product.

JC210 **Job Cost Draws & Receivables**  
★★ This course covers the construction draw and accounts receivable processes in Job Cost. We will cover setup of single and multiple funding sources, creating and submitting draw sheets, tracking receivables, and charge-back to tenants.

JC240 **Job Cost Reporting**  
★★ This course will give specific tips and techniques for making the most of Job Cost reporting. We will review analytic reporting functionality, correspondence for creating contracts, and request for payment (similar to G702/703) documents.

JC320 **Job Cost Forecasting**  
★★★ This advanced course will cover the forecasting feature within Job Cost. Topics include calculating cost-to-complete and projected final costs, as well as cash flow forecasting by job and the forecast integration to Advanced Budgeting & Forecasting.

# eLearning

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**eL040** ● **eLearning: Introduction**  
Find out how eLearning can improve your training program by bringing together fully-customizable Yardi software training with critical industry-specific topics, from fair housing compliance and safety courses to preventing sexual harassment and diversity training. Yardi's 5-in-1 tool combines the accountability, reporting, and efficiencies of a learning management system with a complete authoring tool set, graphics editor, file storage center, and event and webinar management system. Connect your university with HR systems and additional programs to fully automate your training for all onboarding and continued education. Deepen knowledge, save time, reduce errors, and improve training efficiency with eLearning.

**eL125** ★ **Online Communication Made Easy with eLearning +**  
Maintaining contact with learners is essential to effective training. Learn how Yardi eLearning can facilitate communication with learners throughout the platform, from system-generated automated notifications to keep them informed of upcoming training, to custom templated reminders that administrators and supervisors can send at the click of a button. Moreover, learn how to leverage hidden contact tools from different reports and bulk contact functions, as well as facilitate feedback using eLearning surveys. The announcements functionality allows administrators to communicate with learners by group, helping to market new training opportunities directly on the student dashboard. But communication is not just from administrator to student—eLearning offers a variety of communication options between administrators as well. Learn how to use group chat, exchange ideas between course authors, and exchange private observation notes, all within the eLearning University.

**eL140** ★ **Rapid Content Creation in eLearning**  
Maximize your training ROI by fully utilizing our eLearning solution. Discover how easy it is to quickly develop custom courses and 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 in a clean, modern look.

**eL150** ★ **Getting Started with eLearning**  
Learn what it takes to get eLearning up and running for your company. We'll go over possible configuration options to customize the platform and increase the efficiency of your training program. Use strategic groupings of users to automatically assign courses and empower supervisors to individually coach employees and run progress reports. We'll also look at additional features available when you upgrade to a full eLearning University, such as notifications for both students and administrators to avoid daily reporting.

**eL160** ★ **Maximizing Effectiveness of Instructor-Led Training in eLearning**  
Maximize the effectiveness of all of your live events, whether they are delivered in-person or over the web using eLearning. Import your webinars from Citrix, Cisco, or Adobe to streamline meeting management tasks, such as meeting setup, registration, pre-event handout distribution, and attendance tracking. Add online tests that are distributed to all attendees at the conclusion of the event to capture knowledge retention and reinforce key learning objectives. We'll walk through the event process from creation to closing attendance!

**eL190** **Curating a Complete Training Resource Center in eLearning**

★ Pull together all of your HR, IT, and business forms in a centralized, searchable location. The eLearning Resources functionality allows administrators to curate relevant content from a variety of sources and deliver it to specific groups of users that need it most. Deliver documents, embed third party social media tools, host digital content, market surveys, or link out to other websites. We'll take a look at all of these options and look at how to set them up in your eLearning University.

**eL240** **Managing & Automating Learner Data** ■

★★ From account information to test scores, Yardi eLearning manages a significant amount of learner data. In this course, we'll take a look at what type of account and learning data is stored in the system and how you can manage that data using a variety of manual and automated tools. We'll explore how to use import/export tools to keep user account information up-to-date, as well as loading external training records. We'll take a look at additional user fields and dynamic ownership to manage user group and supervisor permissions. Lastly, we'll take a look at automated reporting options to keep you and your supervisors informed of learners' progress.

**eL280** **Strategies for Maximizing Learner Engagement** +

★★ Engaged learners retain more information, thereby improving staff performance and reducing the need for additional training. Discover how to increase learner engagement using Yardi eLearning authoring tools. At the course level, learn how to build interactive eLearning courses that include engaging page elements and self-paced software tutorials. Design training programs that include touchpoints with supervisors, and leverage validation and eSign to track activity outside self-paced coursework. By the end of this course, you'll be ready to take your training program to the next level.

**eL330** **Evaluating Learner Retention & Training Effectiveness** +

★★★ Analyzing the effectiveness of your training begins with well-designed assessments. We'll begin this class by exploring different assessment options available in Yardi eLearning. We'll look at how to create and deploy these assessments to best measure learner retention. We'll also look at Yardi eLearning Surveys, which provide a terrific way to collect training feedback across the platform. Then we'll turn our attention to reporting. From time spent per page to test attempts, Yardi eLearning tracks nearly every student action. We'll take a look at key reports and data points in the system that will help you determine retention on both an individual and group basis, helping you build the most effective training program possible.

**eL340** **Advanced Authoring Tools & Techniques in Yardi eLearning**

★★★ Take your course authoring to the next level by exploring advanced techniques used by Yardi's instructional designers. We'll take a look at best practices to style your custom courses and use Yardi's tools to design visually impactful courses. We'll also take a look at some little-known authoring techniques, such as free drag formatting, snapshot revisioning, and page animations, all of which will add a new look to your courses and increase learner engagement. Seen something you liked in one of our courses? Come with questions, and we'll show you how we did it.

**eL380** **Advanced Super Admin Tools & Practices** +

★★★ Are you a seasoned Yardi eLearning admin looking to take your skills to the next level? This course reviews lesser-known tools that can make your life easier and help you get the most out of the system. We'll also cover best practices that our team has determined over the years—the reminders and advice that can help make sure you don't miss a thing. Our eLearning services team is eager to show you their tips and tricks for optimal university performance and administrative efficiency.

## eLFG Development Roundtable: eLearning Software

- Whether you are new to eLearning or 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 learn how you are 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. Pop in, say hello, and share your ideas in person before leaving the conference!

# Energy

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## EU045 Yardi Pulse for Commercial: Introduction ■

- Learn how Yardi can help you gain unparalleled visibility into your energy demand and consumption across your portfolio. From Utility Expense Management to Real-Time Metering to powerful dashboards, the Pulse suite can save you money and time while also increasing the value of your portfolio.

## EU060 IoT & Smart Homes +

- Your residents and prospects keep asking for smart home tech in their apartments, but where do you begin? Join us to explore the Yardi vision for a residential smart home platform. Increase revenue and resident satisfaction by giving residents the technology and user experience they want, all without adding yet another niche vendor or app. Learn how you'll improve system transparency and control with a residential IoT solution built right on top of Voyager. Gain operational efficiencies by incorporating smart technology into your leasing, community management, and maintenance workflows. The future is arriving, and we're thrilled to share it with you.

## EU062 Success Stories: Utility Invoice Processing & Benchmarking +

- Are you tired of dealing with utilities and their invoice errors? Join the club. Do you have multiple teams needing utility bill data but no time to validate or capture it all? We have the solution. Whether you are an energy manager needing to research consumption spikes, a sustainability professional needing to fulfill ENERGY STAR® benchmarking requirements, a facility manager needing to track the success of operational changes, or an asset manager needing to assign accountability for all of the above, our tools automate these processes and will reduce late fees, so your staff can focus on more important things.

## EU064 Success Stories: Utility Tenant Recovery +

- Are you recapturing as much utility cost as you should? Could your common area deduction be smaller? Would you like someone else to answer tenant calls about utility charges? This session explores best practices for tenant utility billing, legal compliance, and the automated recapture rate tools available and built into Voyager. Whether you need a complex rebill model that mimics the utility's tariff, or you just need to allocate utility costs based on submeter reads, our billing engine can handle your requirements with ease and provide a comprehensive reporting dashboard.

**EU140 Yardi Pulse for Commercial Energy Management +**

★ The Yardi Pulse Suite allows you to manage energy data and automate energy equipment with solutions that meet your investment strategy and fulfill your business needs, all from one connected platform. See how Yardi Pulse helps you get visibility into your utility data, reduce administrative costs, automatically run HVAC more efficiently, and make more informed business decisions with alerts, dashboards, and reporting.

**EU150 Energy Management for Multifamily +**

★ Join this course to learn more about maximizing utility cost recovery with solutions built into Voyager. Learn how a single connected solution for resident billing and online payment options can increase cash flow. See the benefits of managing your utility expenses with existing workflows for access to valuable data. We'll show you how to improve operational efficiency and your bottom line with built-in solutions for all aspects of energy management.

**EU220 Utility Expense Management & ENERGY STAR Benchmarking ■**

★★ This course is targeted for both the multifamily and commercial markets. We'll demonstrate how Yardi uses smart analytics to automate and optimize your utility payables by monitoring consumption, identifying leaks, detecting invoice errors, and recovering overage charges. We'll also show you how adding benchmarking services to Utility Expense Management lets us help you comply with benchmarking regulations and finance programs that require loading your utility consumption data into ENERGY STAR® Portfolio Manager®.

**EU230 I Benchmarked My Property – Now What? +**

★★ Learn more about how to leverage your benchmarking data in ENERGY STAR to measure energy conservation measures, access discounted financing, and increase property values. Data used for complying with benchmarking laws can serve many other business purposes. If you have completed the hard work to set up ENERGY STAR® and report on your properties, why not investigate the additional opportunities that may be available?

## Forecasting

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**ABFFG Development Roundtable: Advanced Budgeting & Forecasting**

🕒 This session will be divided into two parts. In part one, the development team will preview new product features currently in progress and ask for client feedback. In part two, join in an interactive session where you can influence future product development.

**ABF120 Advanced Budgeting & Forecasting: Introduction**

★ 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 wrap up with some common reports. Note: this course will cover only commercial revenue forecasting tools (not residential) and is specific to the Advanced Budgeting & Forecasting product; it does not apply to the Budgeting & Forecasting module.

### ABF170 Advanced Budgeting & Forecasting: Reports



This class will go through commercial reports, financial reports, a number of variance reports, and our graphing reports. We will also be reviewing the reporting suite, where you can set up a batch of reports to run with a single process. These report suites can also be included in a function group. Note: this course is specific to the Advanced Budgeting & Forecasting product, and does not apply to the Budgeting & Forecasting module.

### ABF240 Advanced Budgeting & Forecasting: Reforecasting & Advanced Features



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 valuation, as well as best-practice recommendations. We will also review some of the more advanced features of Advanced Budgeting & Forecasting such as rollups, GL allocations, cash budgeting, functions groups, debt, and jobs. Note: this course is specific to the Advanced Budgeting & Forecasting product, and does not apply to the Budgeting & Forecasting module.  
*Prerequisite: ABF120 (Advanced Budgeting & Forecasting: Introduction)*

### ABF250 Commercial Revenue Forecasting with Advanced Budgeting & Forecasting & Yardi Elevate +



This class will cover the main revenue forecast functionality within Advanced Budgeting & Forecasting and Yardi Elevate Forecast Manager. We will explore the user interface, the seamless use of deals and market rates to drive your leasing options, space and area reconfiguration, as well as using MLA profiles to manage market rates. The class will provide an overview of revenue forecasting and many of the key supporting reports using both Yardi Elevate Forecast Manager and the forecast leasing options of Advanced Budgeting & Forecasting. Note: This course is specific to Advanced Budgeting & Forecasting and Yardi Elevate Forecast Manager for the commercial market, and does not apply to the Budgeting & Forecasting module. *Prerequisite: ABF120 (Advanced Budgeting & Forecasting: Introduction)*

### ABF270 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. *Prerequisite: ABF120 (Advanced Budgeting & Forecasting: Introduction)*

# Investment Management

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## IM010 Why use Investment Management? +

- Attend this synopsis session to understand why adding the Investment Management module to your Voyager system can help you reduce risk while increasing your business services. We'll explain why automating your capital transaction processing can reduce data errors and improve your investor reporting. Learn how much easier it can be to measure performance at the asset, fund, or investor level using this module, and why you'll never want to calculate investor distributions offline on Excel ever again.

## IM020 Investment Management New Features: Performance Analysis & Debt Management +

- How long does it take you to pull together information for consultant questionnaires on your historical performance or to answer questions from management? How are you managing debt in your portfolio, either debt as an asset or as a liability? This session will highlight new features that can help eliminate the spreadsheets and automate these parts of your business.

## IM131 Fund Performance Reporting with Dashboards ■

- ★ This course will demonstrate how you can use InvestorPlus to display key metrics on role-specific dashboards to respond to investor inquiries, consultant RFPs, or simply know your investment's performance at a glance. We'll cover at what levels dashboards can be used, the various charts and grids available to the user, and how users can interact with the data. Learn about special features such as crosstab financials, time-weighted returns options, weighted averages, Excel-based dashboards, and more.

## IM132 Investor Relationship Management ■

- ★ This course will demonstrate how InvestorPlus can help you manage investor relationships including prospecting, correspondence, and reporting. Learn how to capture notes or custom details about each investor as well as how to vet leads or track potential deals leveraging workflows and notifications. Finally, we'll show you how to publish documents and dashboards to your external investors through Investor Portal.

## IM150 Financial Consolidations: Introduction

- ★ 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 pickup rules as well as how to use segments for intercompany eliminations within the rollout hierarchy.

## IM200 Investment Management: Introduction

- ★★ Automate the complex accounting transactions of fund management to dramatically reduce the analysis required by traditional accounting. Investment Management allows you to manage your wholly-owned assets, joint ventures, and other investment types for both small and large portfolio investors. This double session will cover all of the major processes required to configure and create capital transactions including setting up complex investment structures and managing commitments going forward, transaction types, cascade rules, generating capital calls and distributions, tax withholding, partner transfers, income/MV allocations, management fee calculations, and reporting.



IM220

### Investment Management Analytics & Custom Reporting

★★

This course will go into depth on how to leverage standard Investment Management analytics to view capital transactions in a variety of formats and how to create your own Investment Management templates for a multitude of purposes. The second half of this class will cover investor contact management configuration, how to use YSR to generate investor-facing correspondence, and how to leverage our Investor Portal for report distribution and tracking document downloads. Report examples will include distribution notices, capital call letters, and investor summary statements.

IM300

### Fund Performance Reporting Configuration ■

★★★

Part one of this double session will show you how to generate IRRs and returns for your properties, assets, and portfolios. Using NCREIF as the industry benchmark, we will demonstrate how to configure your system for data submission, how to generate the components and returns using our core calculator analytics, and how to verify the results with standard YSR reports. Part two will focus on calculating investor/investment returns and equity multiples using capital transactions from Investment Management. With an eye on the GPS methodology, we will cover how the program calculates time-weighted returns. Finally, we will show you how you can use the attribution analysis in InvestorPlus for composites and how to answer the "what if" questions posed by your clients and prospects. *Prerequisite: IM131 (Fund Performance Reporting with Dashboards)*

IM310

### Investment Management: Advanced Topics

★★★

This advanced course dives deeper into the Investment Management product for clients who have specific needs. Topics include share tracking, pro-rated income allocations, and commitment recalculations (all used for open funds), capital balance and time-weighted share percentage allocation, and revaluation processes (MV/FX). We'll also introduce preferred return accruals, return of capital, and distribution of excess funds. *Prerequisite: IM200 (Investment Management: Introduction)*

## Maintenance

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MI110

### Inspection: Introduction

★

Inspection is a flexible tool for scheduling and managing all types of inspections at multifamily, public and affordable housing, government, and other types of property. 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.

MM020

### Yardi Elevate Facility Manager for Commercial: Introduction

●

Introducing a new UI and purpose-built application for chief engineers, technicians, and asset managers of commercial buildings. Learn about a streamlined and simple way to track equipment and create maintenance plans, inspections, and work orders.

- MM112 Maintenance: Work Order Overview**  
★ This course covers how to use Voyager work orders to manage your day-to-day service requests, maintenance tasks, staff, and materials. We will review work order analytics, various dashboards, and the assignment-to-completion process of a work order.
- MM130 Maintenance Mobile: Overview & Setup**  
★ This class will cover the configuration of Maintenance Mobile for both Android and iOS devices. Topics will include using the reassignment status as well as multi-technician work orders. We will also review recent updates to the app.
- MM157 Fixed Assets: Overview**  
★ This course details the 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.

- MM170 The Power of Preventative Maintenance: Facility Manager for Commercial**  
★ Facility Manager streamlines and simplifies planned maintenance scheduling and setup by utilizing equipment templates and automated scheduling tools. Experience our new user interface that provides oversight of service requests, planned maintenance activities, and inspections being done across your portfolio. Get an overview of our new, easy-to-use mobile app for teams in the field that need to complete service request, preventative maintenance routines, and inspection tasks.
- MM330 Maintenance: Work Order Advanced Features** ★★  
This course will review the use of advanced features such as correspondence letters to tenants and vendors, as well as make-ready functions. We will also review the setup and usage of simple email notifications via the dispatch board, performance standards for response and completion times, and analytic reporting related to performance.

## Marketing

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- KT020 RENTCafé Connect & Call Automation Demo**  
● RENTCafé Connect is a direct extension of your office that captures calls beyond the limits of your onsite team. With RENTCafé Connect call automation, residents can enter maintenance requests or process rent payments. Prospects can get assistance with online applications and general questions. Attend this course to make your marketing dollars go further than you ever imagined while maximizing your resident retention.
- KT040 RENTCafé Lease Docs: Introduction**  
● Come learn about our new, exciting, and powerful RENTCafé lease docs! This course is designed to introduce you to Yardi's new lease library, which will include the lease forms required for specific states and jurisdictions. Currently we have the leases necessary to power you through the largest states in the U.S., and lease forms for the remaining states are in progress. 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.

- KT115 Marketing Automation with RENTCafé**  
★ Evolve your business solutions by learning how to incorporate marketing automation into your day-to-day operations, minimizing redundant, head-down data entry, and key strokes. This course will cover cutting-edge marketing tools available through the RENTCafé Suite of marketing solutions. Walk away with the power to create a better, more consistent customer journey.
- KT120 RENTCafé CRM: Lead Management**  
★ Join us as we take a deep dive into lead tracking with RENTCafé CRM. The training will focus on managing follow-ups, queue management with emphasis on the prospect lifecycle, and discuss what you need to know to boost your leasing initiatives.
- KT125 RENTCafé Communication: Introduction +**  
★ This course will provide you with an understanding of the RENTCafé tools available to keep in touch with your prospects and residents. We will also tackle topics such as the difference between email autoresponders versus email follow-ups, and automated communication versus one-off and bulk communications.
- KT130 RENTCafé Marketing Website Best Practices**  
★ This course will provide you with a fresh look at how to set up and maintain your marketing website. Learn more about easy-to-implement features that will give your property a strong online presence. We'll discuss all you need to know about how to capture your target audience with built-in and intuitive RENTCafé functionality.
- KT135 RENTCafé Connect & Call Automation**  
★ Learn how RENTCafé Connect and the add-on Call Automation service work together to help increase prospect engagement and maximize resident retention by acting as an extension of your leasing office. Through the telephone or via a web chat, Call Automation routes phone calls to the appropriate team, whether it be RENTCafé Connect call center staff, maintenance staff, your leasing office, or elsewhere.
- KT138 RENTCafé for Prospects**  
★ This course will provide a live demonstration of the prospect lifecycle through the use of fully-integrated Yardi marketing products. We will begin with capturing the lead through RENTCafé ILS and step through an application using a RENTCafé marketing site. This class will discuss RENTCafé Connect, Call Automation, scheduling a tour, RENTCafé Kiosk, and so much more!
- KT140 RENTCafé for Residents**  
★ Learn more about the different ways to access our resident services through RENTCafé Kiosk, RENTCafé Connect, the RENTCafé resident application, Concierge, and even Amazon Alexa. Dive into the resident experience with a new perspective on the core features of resident portal including an overview of lease renewals.
- KT155 Digitizing Your Documents with RENTCafé eDocs**  
● This class is an overview of RENTCafé eDocs, a newly-released module for SaaS Select clients. This tool provides clients and account managers with a user-friendly method for creating and maintaining lease documents for RENTCafé.
- KT170 RENTCafé Product Roadmap +**  
○ Be the first to hear about what's next on the priority list, straight from our RENTCafé development team. During this course, expect to see how RENTCafé will continue to be your one-stop shop with new, cutting-edge solutions. There will be something for everyone, whether you are using CRM, prospect portal, resident portal, or marketing tools within RENTCafé.
- KT180 RENTCafé Resources & Troubleshooting Basics**  
★★ This course empowers you to leverage the tools and reporting that RENTCafé Site Manager provides. You will learn how to troubleshoot common issues while also reviewing frequently asked questions and the basic techniques to answer those questions.
- KT210 RENTCafé: New & Extended Features +**  
★★ This course will capture how to get the most out of your RENTCafé Site Manager and CRM software. What's new? What's trending? We will cover the latest and greatest with RENTCafé and discuss our favorite features worth adopting into your workflow!

**KT230**    **RENTCafé Leasing Lifecycles +**  
★★  
Join us as we dive into CRM and review the new leasing dashboards and best practices to manage both applicants and residents throughout the leasing workflow. In this class we will generate one-off documents, add pet addenda, send a guarantor signature request, review bulk countersign, add an occupant after lease approval, and review renters insurance and screening documents.

**KT240**    **Optimizing the Applicant Experience**  
★★  
This course will review best practices to make the most out of your applicants' experience. Join us as we review unit type mapping and organization, page narratives, application form customization and promo codes, site maps for rentable items, employment and address history, prospect-facing signature documents, revenue management integration best practices, and earnest money and waitlist units.

**KT275**    **Resident Management with RENTCafé & RENTCafé CRM**  
★★  
This class will coach attendees on how to maximize resident retention through RENTCafé CRM and extended resident services tools. You will leave this course an expert in NPS, referral campaigns, logging resident activities and tickets, creating and accepting renewal proposals, RSVP events, and much more!

**KT325**    **RENTCafé Marketing Strategy**  
★★★  
This course looks at how to align your marketing initiatives with consumers' intent and expectations. We will review current trends in multifamily marketing, how to leverage powerful optimization features in Site Manager, and understanding the return on your marketing investment through lead attribution and just-in-time marketing.

**KT330**    **Enhancing ROI with RENTCafé Lead Tracking +**  
★★★  
Join us as we learn how to track the web browsing journey of a prospect with lead attribution and dynamic number insertion. We will review the multi-touch models and when to use them and why. Then we will dive into utilizing just-in-time marketing to determine how to maximize your marketing dollars. You will leave this class with greater insight on your prospects' marketing journey and how to optimize your marketing efforts with RENTCafé.

**KT350**    **RENTCafé Marketing Genius**  
★★  
Walk out of this course knowing how RENTCafé empowers you to be a marketing genius. We will cover common marketing industry terms and how they relate to RENTCafé along with extended marketing features such as 3D floorplans, virtual tours, A/B testing, local area marketing, SEO dashboard, interactive site maps, and much more!

**KT375**    **RENTCafé Blue Moon Integration**  
★★★  
The Blue Moon Online Leasing experience within RENTCafé just got even better with Blue Moon Boost! This course will cover the relationship between RENTCafé and Blue Moon, best practices for generating a lease, new features available in Site Manager and RENTCafé CRM, and Blue Moon configuration recommendations.

# Other Modules

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## MG110 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.

## MN110 New York Module Overview



Learn how the New York Module assists your company in meeting DHCR regulations. We'll be demonstrating how to use the New York dashboard and process DHCR lease renewals, vacancy leases, annual rent registrations, rent bills, and comply with New York City health regulations.

## MN210 New Features Update: New York Module



Join us for a demonstration of new and advanced features in the New York module such as MCI, IAI, and RENTCafé and RENTCafé CRM functionality.

## MR050 Development Roundtable: Concierge



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 Concierge



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

## MR220 Concierge New Features



Concierge functionality is also part of RENTCafé. Learn how residents can book amenities, view their packages, set away notices, identify their guests, and see who has been issued keys.

# Multifamily

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## RMSP Spotlight on Multifamily



Join us after the General Session to discover the latest developments and roadmap of the Multifamily Suite. Attend to get a sneak peek at what is happening within Voyager Residential, the RENTCafé Suite (RENTCafé, RENTCafé CRM, RENTCafé Reach, and RENTCafé Connect), Resident Screening, Procure to Pay, and more. This course will provide insight into other courses you may want to attend for more detailed information in each area.

## RM000 How to Maximize Efficiency With Your Yardi Multifamily Products +



Learn how solutions from the Yardi Multifamily Suite integrate to optimize efficiency and improve your bottom line. This course will help you understand how cross-product workflows streamline communication within your company and make processes (and your team) more efficient. We'll cover how the RENTCafé suite, RENTmaximizer, ScreeningWorks Pro, ResidentShield Protection Plan, and more are designed to work together as a single connected solution.

**RM020 RENTmaximizer Overview**

- Learn about Yardi's approach to rental pricing, enabling you to realize the full benefits of our revenue management system. We will cover pricing methodology and term-based pricing, which allows 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.

**RM030 Yardi Elevate for Multifamily: Introduction**

- Learn how Yardi Elevate Asset Intelligence integrates data from RENTmaximizer and Yardi Matrix to give you enhanced insight into your properties' performance and help you reduce expenses and improve overall revenue.

**RM035 Yardi Elevate: Business Intelligence for Multifamily**

Come get an overview of the asset intelligence functionality available in Yardi Elevate for multifamily, and how it can be used to measure the performance indicators that matter to you. This course will include a quick tour of standard and custom KPIs.

**RM040 ScreeningWorks Pro: Introduction**

- Attend this course to learn the basics of ScreeningWorks Pro (Resident Screening in Canada). Learn 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 & ScreeningWorks Pro**

- 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 higher-quality residents and reducing skips to improving bad-debt recovery, learn how contributing and accessing rental payment history data via Voyager and ScreeningWorks Pro (Resident Screening in Canada) can give you a distinct competitive advantage.

**RM070 Yardi Matrix for Residential**

- 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. (This course covers the same material as CM070.)

**RM112 Residential 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.

**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.

**RM125 Voyager Unit Pricing**

- ★ Voyager includes functionality with multiple methods for making changes to unit prices. Topics in the course include unit pricing updates such as market rent increases/decreases (with and without amenities), and unit-type pricing updates with revenue management.

**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.

**RM185** **Yardi Elevate Forecast Manager for Multifamily: Introduction**  
★ This course explores creating a revenue budget for your multifamily properties by utilizing in-place leases, vacant units, assumptions for rental increases, and other metrics to develop a full revenue forecast.

**RM190** **Yardi Matrix: Market Research for Asset Management \***  
★ Learn how you can utilize Yardi Matrix to gain insight into market conditions, including benchmarking your performance to similar assets within your markets and submarkets. Review new supply coming to markets, investor activity, and employment.

**RM195** **Yardi Elevate Asset Intelligence for Multifamily**  
★ Learn how Yardi Elevate Asset Intelligence can help you reduce expenses and improve overall revenue. We will demonstrate how you can view the performance of your assets and how they compare to other properties within your markets. We will also show you how to identify shortcomings and react to market changes, keeping you on-track and on-budget.

**RM210** **Getting the Most out of RENTmaximizer**  
★★ This session will cover best-practice settings for a wide range of areas including new features recently released for RENTmaximizer. Specifically, we will cover new renewal options, residency length rules, new price rule weighting options, new reporting for renewal offers, and automated surveys.

**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 expirations from the dashboard, bulk approvals, letters, processing renewals, scheduled renewals, and simple renewals.

**RM230** **Move-Ins & Transfers**  
★★ Learn the move-in process in detail, 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 tips for troubleshooting the move-in process and associated GL transactions.

**RM235** **Move-Out Process**  
★★ Learn the move-out process in detail, 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, how do you manage the process, where do you start, and what tools should you use? This course provides an overview and discussion on how to manage the takeover process. We will cover logistics, an overview of tools, and validating your data.

**RM242** **Y2Y Conversion Tool**  
★★ Simplify residential property takeovers from another Yardi database using the Yardi to Yardi (Y2Y) tool. This tool puts you in the driver seat to complete the process from beginning to end. We will cover the steps to export and import property data via XML, map chart of accounts and change codes directly in Voyager, and current and historical trial balances.

**RM260** **ScreeningWorks Pro: Best Practices**  
★★ This course is geared towards current ScreeningWorks Pro (Resident Screening in Canada) 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 ScreeningWorks Pro 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 setups.

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.

RM350

### Business Intelligence Setup for Administrators

★★★

Are you currently implementing or planning to implement Orion Business Intelligence for multifamily? Join us to learn about what is involved with setting up and maintaining Orion Business Intelligence for multifamily companies. This course, designed for administrative users but informative for all, will cover setup and implementation steps followed by a dive into personalizing content for end users. We'll cover everything from user management to data configuration, ending with an introduction to our customization toolset.

## Panel Discussions

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PN160

### Tips & Real Life Experiences with Advanced Budgeting & Forecasting

❖

Listen to a panel of clients discuss their experiences with the Advanced Budgeting & Forecasting (ABF) 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.

PN225

### Insider Insights to Automating Utility Invoice Processing

❖

Join this session to hear a panel of clients talk about their experiences saving time and money using Utility Expense Management, an automated invoice processing solution for utility bills, fully integrated with Voyager. Learn how to capture invoice data, track missing bills, identify errors, obtain benchmarking analytics, and benefit from Yardi's expertise dealing with utility companies – all in one platform.

## Payment Processing

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EE120

### CHECKscan

★

This course covers the basic features of CHECKscan, including bank relationship setup, check scanning, and payer association. It will also cover the basics of daily routines, including checking the collect dashboard for any NSF and returned items, and the collect processor report for the daily transmission of funds.

EE260

### Online Payment Processing

★★

This course will focus on one-time ACH and credit card payments made through RENTCafé. We will 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.



EE280



### Recurring Payments

This course will focus on Payment Manager, our recurring payment system. We will cover the various setup options available and how payers can be signed up for recurring payments in Voyager. We will demonstrate the monthly recurring process, reports, and best practices for using automated recurring payments.

EE330



### Payment Processing: Advanced Topics

Attend this course to dive deeper into Payment Processing. We'll discuss how payments are processed, general payment processing tasks, and recommended parameters for Payment Processing. We'll also delve into more advanced topics, including closing the month and bank recs, reporting options and troubleshooting, and when and how to use Admin Utilities.

EE340



### Managing CHECKscan

This course will cover alerts (failures, NSF, other returns, and adjustments), how to use the collect processor report, and explain MICR. We'll also cover tips and tricks for installing scanners and CHECKscan best practices.

## Peer Roundtables

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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.

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.

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 our Professional Services Group.

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.

RT150



### Trainers' Roundtable

Certifications – do you currently use them? In this roundtable we will discuss certifications and how they can help employees in their career path while helping you increase your employee retention. We will have four main areas of group discussion: 1) topics, 2) roadblocks and incentives, 3) delivery method, and 4) planning and executing.

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 and get your toughest questions answered. We will explore how to use social media to optimize your marketing efforts, boost engagement, and build community online.

- RT430 Risk Management: Key Topics & Update**
- ❖ Join this conversation to discuss with your peers strategies for managing risk. Topics will include screening, incident management, vendor compliance, renters or tenant insurance (residential and commercial), claims management, and workman's comp insurance.

## PHA

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- PHSP Spotlight on PHA**  
★ Yardi's PHA software contains many useful tools that can significantly increase your staff's efficiency. This session will spotlight some of the recently-released product enhancements.
- PH100 PHA Updates**  
★ Discover just how much the power and flexibility of Yardi's PHA software can streamline your public housing management tasks. This introductory course will cover important PHA functionality differences between Voyager 6.0 and 7S.
- PH112 HUD Update: PIC Next Generation**  
★ Learn about HUD's PIC Next Generation project and its planned interface with Voyager. The discussion will include timelines, technology, and an update on Yardi's progress.
- PH125 PHA Inspections**  
★ Attendees of this class will learn how to make the most of Voyager's inspection functionality. Topics will include automated scheduling, reinspections, bi-annual inspections, automated QC inspections, and a brief discussion of Yardi's plans for UPCS-V.
- PH143 PHA Best Practices: Application Management +**  
★ This class will include Yardi's best practices for managing waiting list applications incorporating Voyager and RENTCafé PHA. We will discuss effective application and communication management, best purging practices, and how to initiate and schedule eligibility packets.
- PH145 RENTCafé PHA: Online Applications & Applicant Portals**  
★ Learn how RENTCafé PHA can streamline the online waiting list application process. This class will include best practices for duplicate prevention, automated communications, and a discussion on the latest system changes.
- PH149 PHA Best Practices: Recertification Processing +**  
★ Recertifications are an integral part of an agency's daily activities. This course will teach you how to leverage Voyager and RENTCafé PHA to effectively and efficiently recertify families. Topics will include best reporting practices, online recertifications, streamlining verifications, and communications with participants.
- PH161 Basic MTW Configuration**  
★ This session is designed to introduce basic Moving to Work configuration and processing in Voyager. This class is ideal for those considering application to the MTW program.
- PH198 Document Management for SharePoint for PHA +**  
★ This new feature integrates Voyager PHA with the power of Microsoft SharePoint Online. Document management has never been simpler with automated meta tagging, search features, and integrated Voyager security.
- PH215 PHA Financial Features**  
★★ This session covers key financial features of Voyager PHA. Topics will include tenant repayment agreements, landlord and tenant overpayments, and garnishments.

**PH248 PHA Best Practices: Unit Transfers +**  
★★ PHA portfolios can be very complex with unique transfer challenges. Learn Yardi's best practices for unit transfers.

**PH256 Project-Based Voucher RAD**  
★★ This class will cover all of the elements of the Rental Assistance Demonstration (RAD) conversions in Voyager, from Public Housing and Mod Rehab to Project Based Voucher 50058s (PBVs). This comprehensive class will cover ending participation in the Public Housing and Mod Rehab program, conversion to the new portfolio, and management of the tenants under the new program with an emphasis on RAD-specific requirements such as continued FSS, EID, and phase-ins.

**PH320 Managing PHA/Affordable Combination Properties**  
★★★ This class will explore how to manage layered 50058, tax credit, HOME, and market properties within Voyager 7S. Topics covered will include the latest changes for identifying discrepancies in tax credit/PBV and HCV properties.

**PHAUG PHA Users Group**  
○ The PHA User Group is open to anyone utilizing the public housing products. Come network with fellow users, learn about the future of the products, and participate in a series of client-led sessions.

## Procure to Pay

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**P2P040 Bill Pay Overview**  
● Attend this session to see how Yardi can be your bill-pay service with a new addition to your core Voyager functionality: Bill Pay. With Bill Pay, Yardi facilitates making payments to your vendors, owners, and tenants via physical checks, credit card, and ACH.

**P2P050 Procure to Pay Demo**  
● This course provides an overview of Procure to Pay with emphasis on procurement, invoice processing, approvals, and payments. Within this system, PAYscan delivers consistent policies, eliminates paper invoices, and facilitates electronic invoicing. Come see the full transaction lifecycle, from PO to invoice to payment. If you're looking for ways to improve your AP process, this class is for you!

**P2P080 Introducing VendorShield**  
● Learn how VendorShield can help you to reduce operational and reputational risk. VendorShield is a comprehensive, full-service vendor compliance and monitoring platform built into the VENDORCafé and Voyager workflows. The system features configurable criteria, reporting, and real-time, accurate compliance statuses to help you to "know your vendors."

**P2P100 New Features Update: Procure to Pay**  
○ Learn about new features in the Procure to Pay set of products. This course reviews new key features of PAYscan, Marketplace, VENDORCafé, and mobile offerings. This course is intended for existing PAYscan and Procure to Pay users.

**P2P120 Making the Most of PAYscan Full-Service Functionality**  
★ Learn about the full-service functionality within PAYscan, which enables you to reduce time spent manually scanning and entering invoice data. We'll provide an overview of full service, discuss system setup, vendor letters, emergency emails, and more.

**P2P135 Procure to Pay: Marketplace Overview**  
★ 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!

**P2P145 Procure to Pay: VENDORCafé Overview**  
● Learn how VENDORCafé provides a one-stop shop for better vendor management. Pay vendors faster, reduce the need for paper, cut costs, and get better results with VENDORCafé. Discover how to automate your onboarding process and proactively assess vendor risk across your portfolio.

**P2P150 PAYscan Basics**  
★ PAYscan delivers consistent AP policies, eliminates the physical movement of paper, and facilitates electronic invoicing. View the full transaction lifecycle, from converting your paper invoices into electronic invoices, to approval and posting. Learn how to track, review, and process your invoices using PAYscan dashboards and the PAYscan mobile app.

**P2P220 PAYscan Performance Metrics & Operations Analysis**  
★★ With over seven years of product history and over 1,500 clients, the PAYscan AP database contains a wealth of industry information. We have mined this data, analyzed summary statistics, and are ready to share the results with our users. How many invoice approval workflows does a typical organization employ? How long does it take to approve an invoice? How many individuals must review an invoice before it is approved for payment? To what extent are purchase orders used? Can speed and accuracy go together (the answer is YES by the way)? See how you stack up against your peers and how to improve your company's operational performance.

**P2P330 PAYscan & Procure to Pay Best Practices**  
★★★ Learn setup and functionality best practices within PAYscan and Procure to Pay and gain more efficiency, cut costs further, and streamline your AP processing.

## Reporting

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**RE050 Reporting Panel**  
○ This class is a Q&A session with Yardi technical staff about the various reporting options available in Voyager. We will cover everything from simple Yardi SQL scripting to high-end presentations available when using Orion Business Intelligence. You'll also learn the degree of customizations possible with Voyager analytics, SSRS, FillDocs, ad hoc tools, and Spreadsheet Reporting. 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.

**RE060 Yardi Spreadsheet Reporting Overview**  
❖ Yardi Spreadsheet Reporting (YSR) enables advanced report designers to create report packets in Voyager 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.

## Reporting for Non-Developers

### RE110 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? This course will introduce you to the relevant database tables and educate you about the basics of SQL select statements. This knowledge is also helpful for database maintenance and troubleshooting database-related issues.

### RE160 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.

### RE161 Correspondence for Residential



Correspond with your residents, property-wide! Discover how you can use Voyager to print or email letters and statements. 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.

### RE170 Custom Financial Analytics: Introduction



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



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.

### RE250 Using YSR for Custom Financial Analytics



A Yardi Spreadsheet Report, set up to retrieve its data from a previously-developed custom financial analytic, is the preferred way to impose boardroom-quality formatting onto customizable financial reports. This class, which presupposes some familiarity with custom financial analytics, will illustrate the setup procedure of the YSR report in both Voyager 7S and Excel to retrieve the data and conditionally format the report according to the design of the underlying Account Tree.

### 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 Custom Financial Analytics: Intermediate



This intermediate course builds upon the introductory 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 and 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.

**RE370 Custom Financial Analytics: Advanced Topics**  
★★★  
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, 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 (Custom Financial Analytics: Introduction)*

## Reporting for Developers

**RE405 Reporting Comparison Between YSR & SSRS**  
★  
The two main 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-level 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.

**RE540 Yardi Spreadsheet Reporting Technical Session: Part 1**  
★★  
Yardi Spreadsheet Reporting (YSR) is a well-adopted Voyager report-rendering technology that enables designers to create packets of individual documents authored in Microsoft 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 and 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 Excel add-in to help design reports; a tips and tricks presentation and a review of some newer features in the latest Voyager 7S releases; and information about the documentation and how to learn more about YSR.

**RE541 Yardi Spreadsheet Reporting Technical Session: Part 2**  
★★  
This course is a follow-up session to RE540, suitable for those tasked with designing custom reporting solutions using Yardi Spreadsheet Reporting (YSR). Newer features are introduced, such as a YSR admin menu set centralizing many maintenance features useful to YSR report administrators, including uploading and downloading templates and scripts, as well as managing your menu URLs. We'll contrast the classic setup and interface alongside the newer, slimmed-down interface. We'll also explore the ability to lock or hide passed-in filter parameters from menu URLs and discuss a new activity monitoring report. If time permits, we'll look at how to easily echo filter values, how to conditionally hide columns, and review detailed formatting tips and YSR best practices.

**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)*

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 scripts to create new reports or customize existing ones. This course will focus on modifying Yardi scripts to interface with SSRS reports. Knowledge of 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.

## Technology

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TE020

❖

### YardiOne: Introduction

Ever wish you didn't have to enter your credentials each time you access a Yardi program? Do you wish there was a way to easily access all your Yardi applications in one place? If you answered yes, then YardiOne is for you! In this session, we will cover what YardiOne is, what the user's experience is like, and why you should use YardiOne for your company. If you're a system administrator, or if you are interested in learning more about YardiOne, join us!

TE060

●

### Document Management for SharePoint Demo

Introducing Document Management for SharePoint, a new integration for SharePoint in Office 365. This valuable tool helps you take advantage of your Office 365 investment and become a paperless office.

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

★

### Client Central Essentials

Client Central is our most useful resource for clients to access training and technical information. Learn how to access our extensive online resources, including product documentation and training videos. Find out how to create and monitor Yardi support cases and trouble requests (TRs), and manage your licensing. We'll also discuss how to administer your Client Central groups, users, and permissions.

TE171

★

### Client Central New Features

Client Central is constantly evolving, sporting brand-new features approximately once every month. This class is your opportunity to learn about our most recent updates to the Client Central system. Learn how to turn on powerful add-on tools, such as ySQL and File Manager (reducing the need for a remote desktop session), perform your own live-to-test restores, and new reports for our SOX clients. You will also hear about the features currently in development that will be coming out later this year.

TE180

★

### User-Defined Fields & Custom Tables in Voyager 7S

Voyager users have many ways to customize information collected in the program and 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.

**TE215**   **System Administration Toolbox**  
★★  
Become familiar with the features in the 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.

**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.

**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. *Prerequisite: RE110 (Basics of Database Schema & SQL)*

**TE265**   **Document Management for SharePoint**  
★★  
The Document Management for SharePoint product helps you take advantage of your Office 365 investment and become a paperless office. Learn how this integration automates folder setup, tagging, and two-way data synchronization between Voyager and SharePoint. Give non-Voyager and external users quick access to property-level documents. Leverage the change management features and audit trails in SharePoint to secure your documents.

**TE310**   **Voyager Menu Security: Advanced Topics**  
★★★  
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**   **SQL Scripting: Advanced Topics**  
★★★  
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**  
★★★  
This class will provide an overview of the standard interfaces currently available as part of Voyager. There are interfaces suitable for all management types as well as focused interfaces for multifamily, condo, commercial, student, and more. 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. Come see new interfaces designed specifically for the commercial market.



# Vertical Markets

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## AS100 Voyager Condo, Co-op, & HOA Roundtable

Join members of the Voyager Condo, Co-op, and HOA support teams, along with peers from the condo, co-op, and homeowner association industries, for an open discussion of topics such as new features in Voyager, CONDOCafé and CONDOCafé Certificates.

## AS132 CONDOCafé Portal for Condo/HOA Clients

Learn about CONDOCafé, which provides association owners and shareholders the ability to check their real-time ledger balances, make online payments, create and check work order requests, and submit change request forms.

## AS134 CONDOCafé Certificates

Learn how 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.

## CH020 Corporate Housing: Overview

Learn about the upcoming release of Corporate Housing, designed to allow operators to better interact with and manage corporate housing clients and tenants.

## CO010 The Yardi Kube Coworking Platform: Introduction

This course will introduce you to our new coworking solution, Yardi Kube. We'll discuss coworking spaces, terminology, and market forces before demoing Kube. Learn how Kube provides e-commerce, CRM, billing automation, building automation and IT management, reporting, and more. We'll also cover the typical challenges encountered by coworking operators and how we solve for them. The session will wrap with time for your questions.

## ML130 Voyager Military Housing & MILITARYCafé New Features

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.

## MLFG Military Focus Group

Join this focus group of 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.

## SF130 Single Family Homes: RENTCafé & RENTCafé CRM

RENTCafé Single Family Homes delivers improved workflows for applicants and leasing staff to easily track leasing prospects. Learn how to manage prospects during the leasing process and how current residents can make online payments, enter work orders, and interact with your staff via the resident site.

## SF201 Single Family Homes: Best Practices

Voyager Single Family Homes has been optimized to meet the demanding needs of single family housing managers. Learn the standard operating procedures and latest features of this product, designed to enhance productivity and prevent potential problems.

## SF202 Single Family Homes: RENTCafé Best Practices +

This class will be focused on home onboarding and Site Manager training targeted to the single family homes market.

## ST120 Voyager Student Housing Basics



Voyager Student Housing has been designed for the specialized needs of the student housing industry. Discover how to maximize your use of Voyager Student Housing.

## ST130 RENTCafé Student Housing & CRM



RENTCafé Student Housing and RENTCafé CRM Student Housing 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.