



Please note that this course list is subject to change.

## ACCOUNTING/FINANCE

### **AC131 Voyager Bank Reconciliation**

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

### **AC160 Financial Analytics**

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

### **AC206 New AP Functions in Voyager 7S**

Curious about what's new in the world of accounts payable in Voyager 7S? Then this class is for you! We will cover vendors and remittance vendors, AP templates, payment processing, credit card payables, and more. Prerequisite: a basic understanding of Voyager 7S. It is not required, but is suggested, to take this class paired with AC207 - New AR Functions in Voyager 7S.

### **AC207 New AR Functions in Voyager 7S**

Curious about what's new in the world of accounts receivable in Voyager 7S? We will discuss the quickest way to enter charges and receipts, and the new ledger cleanup functionality. Prerequisite: a basic understanding of Voyager 7S. It is not required, but is suggested, to take this class paired with AC206 - New AP Functions in Voyager 7S.

### **AC237 Month End Tie-Outs: AR, Security Deposits, & AP**

Month end is a hectic time for accounting. In this class, learn some useful tips and troubleshooting tools to help complete month-end tasks.

### **AC310 Financial Best Practices in Voyager**

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

# AFFORDABLE HOUSING

## **AF100 Spotlight on Affordable Housing**

Join us for a discussion of recent and upcoming product changes. This session will be a great foundation for the affordable housing courses scheduled during the forum. We will highlight important features to be aware of that could help streamline your organization's processes. [All Subsidy Types]

## **AF112 RENTCafé Affordable Housing New Features**

RENTCafé Affordable Housing continues to evolve. Join us as we discuss updated reporting and statistics, the new property manager dashboard, and the addition of electronic signatures to additional documents. We have also provided a feature that permits the applicant to invite roommates to join the application process. [All Subsidy Types]

## **AF115 RENTCafé Affordable Housing Applicant Workflow**

Interested in automating your compliance interviews, or allowing prospects to complete applications conveniently 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 program. [All Subsidy Types]

## **AF201 Affordable Housing Best Practices**

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

## **AF202 Introduction to Local Programs**

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 this new addition to market. [Local Programs]

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

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

### **AF227-1 Repayment Agreements Part 1: Setup**

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

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

Repayment agreements are a growing part of managing Section 8 properties since the mandate of Enterprise Income Verification (EIV). This three-part course discusses the current state of repayment agreements and demonstrates how repayment agreements are made much easier with the Repayment Agreement feature in the Affordable Housing product. This feature allows users to track repayment agreements and associated expenses, and automates monitoring and forwarding collections to HUD. This is the second of three parts, in which we will discuss the proper way to use repayment agreements and provide examples of real world situations. [50059] (Part two of a three part class)

### **AF227-3 Repayment Agreements Part 3: Troubleshooting**

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

### **AF231 TRACS Update**

Keeping up with TRACS and other HUD changes can be challenging. In this class we will discuss some of the upcoming changes to TRACS, their impact on Voyager and on your business processes. We will also discuss the timing of these changes and how to make your life easier during the next TRACS transition. [50059]

### **AF236 Affordable Housing Unit Transfers**

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

### **AF240 Solving HAP Voucher Issues**

Learn to detect and resolve common issues that arise during the creation and submission of HAP and TRACS vouchers. We will discuss common and not-so-common issues, their resolution, and prevention. [50059]

### **AF243 Affordable Housing Rent Changes**

Each subsidy type has its own unique requirements and challenges when dealing with rent changes. In this class, we will discuss best practices for applying rent changes in single-subsidy properties. We will also discuss reports to help troubleshoot rent change issues. Join us to learn more about this potentially complex subject. [All Subsidy Types]

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

Proper setup of affordable housing accounts is critical to the most 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. (Part 1 of a 4 part series) [All Subsidy Types]

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

Proper monthly procedures 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. (Part 2 of a 4 part series) [All Subsidy Types]

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

Voyager Affordable Housing receivable reports are enhanced to reflect the financial condition of affordable housing properties. Attend this course to learn about affordable 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. (Part 3 of a 4 part series) [All Subsidy Types]

### **AF260-4 Affordable Housing Accounting Part 4: Troubleshooting**

Accurate resident ledgers are essential for successful property management. Learn how to ensure the accuracy of resident ledgers. The course focuses on handling subsidy charges and payments. You will also learn how to use the affordable housing accounting exceptions report for identifying and correcting errors in resident ledgers and inconsistencies between ledgers and receivable reports. (Part 4 of a 4 part series) [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]

### **AF290 Affordable Housing Ad Hoc Reporting**

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

### **AF291 Understanding Affordable Housing Analytic Reports**

Join us for a deep dive into some of the popular compliance reports available in affordable housing analytics, specifically including certification listing, max rent audit, unit mapping, and wait list. [All Subsidy Types]

### **AF318 Advanced Affordable Housing Letters & Forms with FillDocs**

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

### **AF330 Developing Affordable Housing Processes & Workflows**

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

## PHA

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### **PH010 Spotlight on PHA**

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

### **PH135 Voucher Management System**

Voucher Management System (VMS) is a cornerstone of HUD reporting for the Housing Choice Voucher program. This class will discuss the latest changes to VMS and explain the underlying logic that is used to determine how the report is populated.

### **PH145 RENTCafé PHA: Waiting List & Application Management**

This session will encompass the RENTCafé waiting list processes including initial entry into the system, managing communications with applicants, and generating waiting lists. This session will also discuss Yardi's best-practice suggestions for successful online waiting list management.

### **PH148 RENTCafé PHA: Online Recertifications**

This interactive class will give an overview of the latest in online recertification technology using Voyager and RENTCafé PHA. Learn how you can leverage Yardi software to significantly reduce costs and create efficiency. This session will include a Q & A with an existing RENTCafé PHA client.

### **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.

## **PH201 PHA Overview Planning for Voyager 7S**

This class will detail the steps involved in upgrading from Voyager 6 to 7S, including a review of training materials, timelines, testing, and key requirements.

## **PH211 PHA Setup & Configuration**

Attend this course to learn about the PHA setup options available in Voyager and how they impact day-to-day processing. This class will cover the basic configuration options with an emphasis on new settings within the Housing Authority Administration menu.

## **PH218 AdHoc .NET & FillDocs for PHA**

Learn to use the PHA AdHoc tool. This functionality enables the creation of ad hoc reports in Voyager using PHA-specific data. This class will highlight new integrated FillDocs tools to simplify the creation of letters in Voyager.

## **PH227 PHA Audit Reports & How to Correct the Data**

There are a number of standard audit reports available in the PHA product to help clients monitor and manage exception cases. In this class we will review and discuss the purpose of many of these reports and point out what to look for on the reports. Where appropriate, we will guide you through the process to correct the underlying data. This class will provide you with an understanding of how to use the audit reports to monitor exceptions and ensure better overall operations.

## **PH256 Project-Based Voucher RAD**

This class will cover all of the elements of the Rental Assistance Demonstration (RAD) conversions in Yardi 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.

## **PH290 PHA Potpourri**

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

## **PH345 PHA Demographics & HCV Forecasting Tool**

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

## REPORTING

### RE060 Yardi Spreadsheet Reporting Overview

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

### RE170 Introduction to Custom Financial Analytics

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

## TECHNOLOGY

### TE120 Upgrading to Voyager 7S

Preparing for a move from Voyager 6.0 to Voyager 7S? Then attending this course is right for you! Join our class to discuss the highlights and best practices for upgrading, including training and implementation suggestions to help with your migration to the latest version of 7S.

### TE170 Client Central Essentials

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

### 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.

