

Course Descriptions

ICON LEGEND

★ BASIC

★★ INTERMEDIATE

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

★★★ ADVANCED

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

○ TARGETED FOR USERS

❖ TARGETED FOR EXECUTIVES

● SALES DEMONSTRATION

⊕ NEW COURSE

■ UPDATED COURSE

Accounting

AC050 Financial Reporting Overview



Get an overview of financial reporting options available in Voyager. After a brief presentation of each tool, we will open the course to a question and answer session with a focus on helping users streamline financial reporting.

AC131 Voyager Bank Reconciliation



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

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 Introduction to Account Trees



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

AC236 Prepay Setup, Troubleshooting, & Month-End Tasks ⊕



Proper setup of the Voyager prepay functionality is critical to the most efficient and effective use of your receivables system. This can be especially important during month-end tie-outs. Join this course to learn the recommended setup and how to troubleshoot prepay issues, including month-end tasks.

Accounting

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.

AC310 Financial Best Practices in Voyager



Learn how to apply accounting best practices to your Voyager system for optimized user efficiency and accuracy. Join this course to learn about topics such as general ledger account setup, accounting-related system options, charge code definitions, transaction processing, and more.

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.

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. It will demonstrate the monthly recurring process, reports, and best practices for using automated recurring payments.

EE370 Payment Processing Best Practices



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

EP010 PAYscan Round Robin +



Procure to Pay delivers consistent policies, eliminates paper invoices, and provides visibility and control over your AP processes. This course is split into three high-level, back-to-back presentations that provide an overview of the components that make up Procure to Pay. Part one covers PAYscan, which supports paperless AP and invoice approval workflows. Part two discusses Marketplace, a catalog shopping and procurement environment featuring national partners such as The Home Depot, Grainger, Staples, and others. Customizable shopping lists and electronic invoice delivery is built into this solution. Part three covers VENDORCafé, a portal application supporting invoicing, W-9s, COIs, and other documents for vendor on-boarding and compliance. It facilitates vendor self-service, allowing your providers to upload invoices and inquire about payment status.

EP150 PAYscan Basics



PAYscan delivers consistent 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 in Voyager as well as on the PAYscan mobile app.

EP220 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.

EP320 PAYscan Tip & Tricks



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

Community Management

VSL020 RENTCafé Senior Living: New Features, Roadmap, & Roundtable +



Learn about new features that have been added to our expanding resident and family portal. Hear the plans for our 2018 roadmap and share your feedback. This class is recommended for new as well as existing RENTCafé Senior Living clients.

VSL110 Resident Lifecycle & Billing



Attend this course to master the tools you need to properly manage your census and generate accurate billing and statements for your payers.

VSL120 RENTCafé Senior Living



Learn about the exciting features of RENTCafé Senior Living, including resident and family portals complete with online payment functionality and secure access to resident health records. This class is recommended for new RENTCafé Senior Living clients.

Community Management

VSL130 Co-occupant Management



Learn senior living co-occupant management features, including shared contacts, second resident rates, shared payer codes for check scan, joint unit transfers, and streamlined handling when one of the occupants moves out. Guidance will be provided for new implementations as well as for clients transitioning from legacy second resident functionality.

VSL210 Voyager Senior Housing Best Practices: Setup & Administration



This session examines the setup options available and best practice recommendations for fundamental elements of your Voyager community management software. System-wide components, as well as community-specific settings that affect billing and other routine procedures, are discussed. The session will also explore the nuances of configuring senior housing units and services.

VSL230 Voyager Senior Housing Toolbox: Tips & Tricks



Learn tips and tricks to address common questions and issues. This course will look at toolbox items specifically for senior living as well as the standard Yardi utilities toolbox. Learn what each tool does (and doesn't do), and when to use it. The course also includes a demonstration of the toolbox's reporting capabilities.

VSL235 Medicaid Setup & Overview +



Review Medicaid setup based on compliance and state requirements. This course includes an overview of general setup, logic, Medicaid billing, Medicaid receipts, and Medicaid resident procedures, such as leave of absence, rate updates, and payer/template changes.

VSL240 Property Takeover & Conversion



Do you know which tools are available in Voyager to process a property takeover or change of ownership? This course provides an overview of data conversions, standard import and ETL setup, and built-in tools such as Archive Property. We will also cover reports available for validating your data and steps to take to produce your first billing.

VSL320 Medicaid New Features & Troubleshooting +



Medicaid is complex and accurate Medicaid billing requires thoughtful attention. In this course, we will explore the new Medicaid features available: paper claim form reports, electronic transmissions, additional claims mapping fields, and payer associations. We will also discuss troubleshooting techniques for common mistakes made when performing everyday Medicaid tasks.

Electronic Health Records

EHR010 EHR Roadmap & Roundtable



Get the latest scoop on what's next from the EHR product team. Learn about new features and planned future improvements.

EHR020 Senior Living Suite Overview



Learn how you can leverage the products in the Senior Living Suite to run all aspects of your business. This session will include a high-level overview of Voyager Senior Housing, EHR, Senior CRM, and RENTCafé Senior Living, as well as a demonstration of how information can be shared seamlessly between the resident care, sales and marketing, and business office teams.

EHR100 EHR: New Features +



Attend this course to review several key enhancements and new features added to the EHR product this past year.

EHR110 Universal Assessment Library



Get to know the Universal Assessment Library tool. This assessment library works across all states and automatically generates state-required forms.

EHR120 EHR Best Practices: Setup & Administration



Learn basic system administration and setup of EHR. (2-part session)

EHR130 EHR App: Charting Online & Offline



Learn about the EHR app, which enables online and offline charting of tasks and orders.

EHR160 Basic Clinical Information +



Learn how features in EHR can help maintain an accurate clinical record and improve resident care. Features include an alerting system, custom dashboards, vital records, and more.

EHR210 EHR: Pharmacy Integration



Learn how pharmacy integration can streamline the medication order entry process, reduce errors, and save time for your clinical team.

EHR230 EHR: Order Management & eMAR



Learn how to use the electronic medication management capabilities in EHR. This course will cover basic medication management functions such as order entry, DCs, and holds as well as more advanced topics such as charting restrictions, drug database usage, and best practices.

EHR240 Care Stream +



Learn about Care Stream, which provides a consolidated view and charting functionality for all care and orders that need to be provided to a resident.

Electronic Health Records

EHR310 EHR: Incident Reporting



Get to know the configurable Incident Reporting tool for tracking resident, staff, and community incidents. We'll look at existing features as well as provide a preview of enhancements that will be available soon.

Reporting

RE060 Spreadsheet Reporting Overview



Yardi Spreadsheet Reporting (YSR) enables advanced report designers in Voyager 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.

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 on the basics of SQL select statements. This knowledge is also helpful for database maintenance and troubleshooting database-related issues.

RE250 Using YSR for Custom Financial Analytics



Leverage the power of YSR and Microsoft Excel to transform custom analytics into boardroom-ready financial reports. This class will teach you how to turn reports created using the custom analytic engine into Yardi's most exciting reporting technology, YSR.

Senior CRM

VSL010 Senior CRM & RENTCafé Roadmap



Get the latest scoop on what's next from the Senior Living development team. Learn about new features and planned future improvements to our Senior CRM and RENTCafé products.

VSL100 Senior CRM: New Features ■



Attend this course to review the major enhancements and new features added to the Senior CRM product this past year.

VSL150 Senior CRM: Pipeline Management



Learn how to leverage the workflows and features in Senior CRM to manage your prospect pipeline, maximize sales counselor efficiency, and forecast and improve occupancy.

VSL160 Senior CRM: Reporting



Take an in-depth look at the reporting capabilities in Senior CRM, including tools such as dashboard widgets, listing analytics, and YSR reporting.

VSL220 Senior CRM Best Practices: Setup & Administration



Learn how to configure your Senior CRM system to conform to your business practices and maximize efficiency for your staff.

VSL250 Senior CRM: Leasing Workflow *



In this class we'll review the Senior CRM leasing workflow functionality. This integrated process is a series of defined steps that include key data from the Senior Housing and EHR products. The session will include electronic lease approvals and digital signatures.

Technology

TE020 Introduction to YardiOne



Ever wish you didn't have to enter your credentials each time you accessed 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 class, we will cover what YardiOne is, how to set it up for Voyager 7S, and what the user experience is like. If you're a system administrator, or if you are interested in learning more about YardiOne, join us to learn about this new and exciting feature!

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.

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.

TE220 Voyager Menu Security



This course covers how to protect and restrict access to data by dividing your Voyager users into security groups, with each security group having a customizable menu set associated with it. You'll also learn how to set up individual users, user access, and permissions. The course will conclude with an overview of security analytic reports.

Technology

TE240 Report Runner (Conductor.NET)



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

eL260 Reclaiming your Work Day by Automating eLearning



Gain valuable time in your day by automating training administration tasks in eLearning. Set up integrations with your HR system to automatically create and manage all of your user accounts, and leverage SSO to avoid the need for another set of usernames and passwords. Use Groups to automate the deployment of comprehensive learning plans that deploy new courses to your learners as they progress through the training program. Keep track of learning progress using automated notifications and scheduled reports. All of these time-saving tools will help streamline administrative processing, freeing you up for other tasks.

eLearning

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. Elevate learning, save time, reduce errors, and improve training efficiency with eLearning.

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.

These course descriptions are for informational purposes only and are subject to change at any time.



Yardi Systems, Inc. 430 South Fairview Avenue, Santa Barbara, California 93117
phone: +1 800 866 1144 | email: forums@yardi.com | www.forums.yardi.com