Efficient Document Management for Every PHA

How to save time and boost efficiency

DOCUMENT MANAGEMENT AND SOLUTIONS FOR LARGER AGENCIES

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Common challenges with document storage

97% of organizations have *minimal* or *no* digital document processes

Document storage is a major challenge for every public housing agency (PHA). Whether it's organizing your files or compliance and security concerns, the list goes on. And when done manually, the process can be tedious.

With so many documents piling up, you need solutions that can tackle the daily challenges of PHA duties. But the process must be simple so all users can benefit.

Without a secure document management process, your agency may experience:

- Compliance and security issues

- Difficulty accessing and organizing documents

- Inefficiency due to lack of integration with key programs

- Hours wasted on manual processes

Modern solutions for document management

Luckily, there's software that solves these problems. However, not all software is created equal. You need a secure, user-friendly document management solution that integrates with all aspects of your business.

With Yardi's document management tools, you can:

- Centralize and easily retrieve files

- Ensure your files are secure

- Integrate with Yardi Voyager and various Microsoft products

In this ebook, you'll learn about three Yardi document management tools for public housing agencies:

- Yardi Document Management for SharePoint

- Yardi Data Connect

- Yardi Replicate

Yardi Document Management for SharePoint

Simplify file storage with a trusted solution

Yardi Document Management for SharePoint is a simple solution to your growing document dilemma.

It integrates your Voyager data into Microsoft SharePoint, providing a centralized and secure method to store your data.

Now, let's explore some of the key benefits...

SHAREPOINT
BENEFIT 1

Organize and easily locate millions of stored files

You know how difficult it can be to manage and store documents, whether it's leases or compliance files. But with Yardi Document Management for SharePoint, you can store and share them in a secure, unified system.

"With seamless integration between Voyager and SharePoint, the configuration was completely automated. Centralizing on Yardi Document Management has likely saved us a lot of time and operating costs"

HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ (HASC)

Quickly locate any document using familiar search criteria from Voyager with optical character recognition (OCR).

EXAMPLE:

A housing authority is dealing with an audit and needs to locate specific tenant records and compliance record — but they have thousands of scanned files.

SharePoint's search functionality allows the agency to easily search the contents of scanned documents.

This way they can find the required documents, saving time and reducing stress during the audit process.

SHAREPOINT
BENEFIT 2

Leverage user security from Yardi Voyager

Many agencies struggle with uncoordinated content storage. Important documents are housed in multiple places, including Outlook or your hard drives. This leads to efficiency and security issues.

The Solution? Seamless integration with Yardi + SharePoint

- **Integrates users' security permission**s straight from Voyager
- **Saves time** by avoiding the need to create new data access structures
- **Reduces errors** with simplified management

Fortunately, Yardi Voyager's user roles and security permissions integrate with SharePoint. So, you won't need to create data access structures.

With this seamless integration, you get a unified system where managing user access and permissions is straightforward. This creates an efficient document management system without the usual headaches and security concerns.

SHAREPOINT BENEFIT 3

Save documents from email with Outlook add-in

Your inbox is likely full of important tenant and lease information. Instead of downloading documents, saving them to your desktop and then uploading into SharePoint, you can upload directly to SharePoint right from Outlook. It's quick and easy!

Here's how it works:

1. While in Outlook, click the Yardi SharePoint add-in

2. Select the property

3. Choose folder you want to add it to

4. Upload file to SharePoint

SHAREPOINT
BENEFIT 4

Access to SharePoint online in its entirety

Providing a bridge between Yardi Voyager and SharePoint

When you use Yardi Document Manager for SharePoint, you can access the full range of SharePoint's functionalities, such as:

- **Cloud storage:** store and sync files in the cloud so anyone can work with you securely

- **Remote access:** see live updates anytime using any device

- **Effective collaboration:** facilitate your team's duties through shared workspaces

    "When you attach a document in Voyager, it's stored securely and seamlessly in SharePoint. This, this gives you the flexibility and security of SharePoint, including everything it has to offer," says Jeff Bischoff director at Yardi.

Read on to learn more about our solutions for larger agencies

Yardi Data Connect

Turn data into housing solutions

Many agencies face the challenge of managing a growing storehouse of data related to properties, leases, occupancy and more. This overwhelming data pile-up can lead to compliance issues, inefficiencies and data silos.

Yardi Data Connect solves this by providing a secure feed from Yardi Voyager into your Microsoft Power BI. This integration allows you to create business intelligence dashboards and aggregate data from multiple Yardi databases — enhancing compliance and streamlining operational efficiency.

Ready to make collecting your insights easier?
Keep reading to see how Yardi Data Connect can help.

DATA CONNECT
BENEFIT 1

Integrate with Microsoft Power BI

You are likely familiar with Microsoft products to some extent. That's exactly what makes Data Connect a perfect option. **It lets you securely push data into your Microsoft Power BI for comprehensive reporting, allowing you create insightful reports using a platform you already know and trust.**

If you're not familiar with it, Microsoft Power BI is a powerful analytics tool that transforms raw data into meaningful insights through interactive dashboards and reports. It's designed to be user-friendly, letting you visualize data from multiple sources for better decision-making and strategic planning.

"Starter packs" — get the basics

DATA CONNECT BENEFIT 2

Yardi Data Connect comes with "starter packs" that include recommended data, reports and visualizations. **These help you get started without having to build everything from scratch.** This way you can begin generating essential reports in half the time.

DATA CONNECT BENEFIT 3

Create rich reports with compelling visuals

With Yardi Data Connect, you can create powerful reports with visuals that provide complete views of the data. These can help communicate insights clearly among stakeholders and highlight areas needing attention.

Creation of custom dashboards and metrics

**DATA CONNECT
BENEFIT 4**

With the dashboard "starter pack," agencies can quickly generate insights from hundreds of customizable dimensions and measures. This flexibility allows you to monitor key performance indicators (KPIs) relevant to your operations and improve overall efficiency.

The perfect solution for your data needs

Yardi Data Connect is here to solve your data dilemmas. For mid-to large-sized agencies, it's the ideal solution.

Just imagine the possibilities with seamless data integration from Voyager and real-time insights at your fingertips.

Yardi Replicate
Moving big data for PHAs

Are you managing large amounts of data? If so, we've got you covered. Yardi Replicate offers a robust solution for larger agencies who prefer using reporting platforms other than Power BI. In fact, no matter what your preferred reporting platform is, Replicate can push data into it.

Now, let's jump into some of the benefits.

REPLICATE
BENEFIT 1

Access to hot data

Yardi Replicate delivers "hot data" — meaning data is pushed to your preferred reporting platform the second it hits your database. With Replicate, you can make real-time decisions based on the freshest data available.

This ensures you have up-to-the-second reporting, which is crucial in the public housing space.

REPLICATE
BENEFIT 2

Customizable data selection

With Yardi Replicate, you can pick and choose which visualizations you want to see. For example, if you only care about occupancy data, you can focus on that and disregard unnecessary budgeting data. This ensures you can get only the precise info you need.

No need for new software development

REPLICATE BENEFIT 3

Replicate leverages Qlik — a data analytics platform that transforms data from various sources into easy-to-use, actionable insights.

Because Replicate uses Qlik as its backbone, there's no need to develop new software. It integrates seamlessly with your existing tools, giving you access to your data management without the hassle or cost of adopting new systems.

REPLICATE
BENEFIT 4

Utilizes change data capture for up-to-date information management

Yardi Replicate efficiently moves data from Yardi Voyager to other cloud environments, avoiding the usual slowdowns of large data transfers. It uses smart technology called change data capture (CDC).

What is change data capture anyways?

It *identifies* and *captures* any changes made in a database, then delivers those changes immediately to another system or process.

The result? *Faster, more efficient performance.*

Master big data with Yardi Replicate

Yardi Replicate is here to handle your big data hassles. This is ideal for larger agencies who can benefit from seamless data integration and live reporting.

Simplifying your document and data hassles with trusted solutions

File storage and data aggregation doesn't need to be a drag. Yardi's solutions just makes life easier for your agency's team, saving you time AND money.

With Yardi Document Management for SharePoint, you can:

- Organize and locate files easily
- Integrate user security seamlessly
- Upload documents directly from email

With Yardi Data Connect and Replicate, you can:

- Create reports with Microsoft Power BI
- Access real-time data for informed decisions
- Customize data selection as needed
- Add to existing tools without new software

No matter the size of your agency, Yardi has a solution to streamline your document and data management.

Certain agencies require specific tools to manage their documents and data. So, take the next step towards greater efficiency and security. Inquire about our solutions today and see the positive impact on your team.

Thank you!

Yardi is here to help you solve all your document and data handling problems.

Call **800-866-1144** to schedule a demo today!

⩔ YARDI | Energized for Tomorrow

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