mri

REAL ESTATE SOFTWARE

2018

Service Partner
Certification Curriculum Guide

Contents

MRI Non-Product Courses

COURSE TITLE
Database Schema

COURSE OVERVIEW
This course will introduce trainees to the table hierarchy in MRI beginning with system tables and then, reviewing each of the Alloy modules.

COURSE LENGTH
2 Hours

CERTIFICATION CREDITS
N/A

RECOMMENDED COURSE PREREQUISITES
None

COURSE OUTLINE

1. MRI System Tables
    a. MRITABLE – List of Tables table
    b. MRIFIELD – List of Fields table
    c. MRIINDEX – Index table
    d. MRIRELN – Relations table
2. General Ledger Tables
3. Accounts Payable Tables
4. Commercial Management Tables
5. Residential Management Tables

Accounts Payable

COURSE TITLE

AP II – Bank Reconciliation

COURSE OVERVIEW

This course will introduce trainees to the bank reconciliation function in the Accounts Payable module. The trainee will gain insight into the table structure, functionality, and processes of the bank reconciliation program.

COURSE LENGTH

1.5 Hours

CERTIFICATION CREDITS

1 Credit

RECOMMENDED COURSE PREREQUISITES

AP Application Immersion
AP MGMT Options
AP Tables
AP Invoices
AP Reporting
AP Check Processing
AP Closing Procedures

COURSE OUTLINE

1. Tables Used
   a. SCHK – Check Summary table
   b. DEPOSIT Tables – RM, CM, and Corporate AR
   c. GHIS – GL Closed Period Journal Entry table
   d. JOURNAL – GL Open Period Journal Entry table
2. Overview
   a. Bank Reconciliation side
   b. GL Reconciliation side
3. Processing
   a. Withdrawals
   b. Deposits
   c. Bank Reconciliation Adjustments

COURSE TITLE

AP II – Check Processing

COURSE OVERVIEW

This course will introduce trainees to the check processing function in the Accounts Payable module. The trainee will gain insight into the check printing process and management options that affect check printing.

COURSE LENGTH

1.5 Hours

CERTIFICATION CREDITS

1 Credit

RECOMMENDED COURSE PREREQUISITES

AP Application Immersion

AP MGMT Options

AP Tables

AP Invoices

AP Reporting

COURSE OUTLINE

1. Check Batch Authorization

2. Check Printing Options on MGNT (Management Options table)

3. Check Options on BANK (Bank table)

4. Invoice Selection

5. Check Processing

    a. System Checks

    b. Manual Checks

    c. Voiding Checks

COURSE TITLE

AP II – Closing Procedures

COURSE OVERVIEW

This course will introduce trainees to the month-end close process in the Accounts Payable module. The trainee will gain insight into the closing reports, journal entry process, and closing process for AP.

COURSE LENGTH

1.5 Hours

CERTIFICATION CREDITS

N/A

RECOMMENDED COURSE PREREQUISITES

AP Application Immersion
AP MGMT Options
AP Tables
AP Invoices
AP Reporting
AP Check Processing

COURSE OUTLINE

1. Pre-close Reports for Reconciliation

    a. MRI_OPENSTAT – Open Status report

    b. MRI_DISTLST – Distribution List report

    c. MRI_CHKREG – Check Register report

2. Corrections

3. Journal Entries

4. Close Period

COURSE TITLE
> AP II – Management Options

COURSE OVERVIEW
> This course will introduce trainees to the management options related to the Accounts Payable module and their impact on processing.

COURSE LENGTH
> 1.5 Hours

CERTIFICATION CREDITS
> 1 Credit

RECOMMENDED COURSE PREREQUISITES
> AP Application Immersion

COURSE OUTLINE

1. MGNT (Management Options table) and APOPTION (AP Options table)

2. Accounts Payable Related Management Options

COURSE TITLE

AP II – Reporting

COURSE OVERVIEW

This course will introduce trainees to the key reports in the Accounts Payable module, discussing when to run each, and relevant run-time options.

COURSE LENGTH

1 Hour

CERTIFICATION CREDITS

N/A

RECOMMENDED COURSE PREREQUISITES

AP Application Immersion
AP MGMT Options
AP Tables

COURSE OUTLINE

1. MRI_BANKREC – Bank Reconciliation report

2. MRI_CHKREG – Check Register report

3. MRI_DISTLST – Distribution List report

4. MRI_OPENLST – Open Invoice List report

5. MRI_OPENSTAT – Open Status report

6. MRI_VENDLST – Vendor Listing report

COURSE TITLE
AP II – Tables

COURSE OVERVIEW
This course will introduce trainees to the key tables in the Accounts Payable module and discuss the relationship between them. The trainee will gain insight into how banks, vendors, entities, invoices, and check processing work together in AP.

COURSE LENGTH
1.5 Hours

CERTIFICATION CREDITS
N/A

RECOMMENDED COURSE PREREQUISITES
AP Application Immersion
AP MGMT Options

COURSE OUTLINE
1. BANK - Bank table
2. VEND - Vendor table
3. ENTITY - Entity table
   a. AP Tab within Entity Table
   b. BMAP - Cash Map Tab within Entity Table
4. Invoice Tables
   a. INVC – Invoice Header table
   b. HIST – Invoice Details table
5. Check Tables
   a. SCHK – Check Summary table
   b. SELCHK – AP Check Selection table

COURSE TITLE
>   AP II – Invoices

COURSE OVERVIEW
>   This course will introduce trainees to the various types of invoices which can be entered in the Accounts Payable module. The trainee will gain insight into how different AP transactions are processed and how accounting basis affects them.

COURSE LENGTH
>   1.5 Hours

CERTIFICATION CREDITS
>   1 Credit

RECOMMENDED COURSE PREREQUISITES
>   AP Application Immersion
>   AP MGMT Options
>   AP Tables

COURSE OUTLINE

1. Accounting Basis Review
    a. Cash Basis
    b. Accrual Basis

2. Transactional Tables
    a. SESS – AP Sessions table
    b. INVC – Invoice Header table
    c. HIST – Invoice Details table
    d. SCHK – Check Summary table

3. Invoice Entry
    a. One-time invoices
    b. Recurring invoices

4. Invoice Authorization
    a. Management Option impact on invoice authorization and deleting invoices

COURSE TITLE
>1099/CRP Training

COURSE OVERVIEW
>This course is designed to familiarize the trainee with annual 1099 and Minnesota Certificate of Rent Paid (CRP) training. By the end of this course, the trainee will be able to complete the setup and process 1099's and CRP's.

COURSE LENGTH
>1 Hour

CERTIFICATION CREDITS
>N/A

RECOMMENDED COURSE PREREQUISITES
>Intro to Accounts Payable

COURSE OUTLINE
>1. 1099 Overview
>2. 1099 Setup
>3. 1099 Processing
>4. CRP Overview
>5. CRP Setup
>6. CRP Processing

COURSE TITLE
Expense Control

COURSE OVERVIEW
This course is designed to familiarize a trainee with an understanding of Expense Control and how to set it up. By the end of the class, the trainee should be able to understand the process flow of purchase orders/invoices through Expense Control and how to troubleshoot this piece of Accounts Payable.

COURSE LENGTH
1.5 Hours

CERTIFICATION CREDITS
1 Credit

RECOMMENDED COURSE PREREQUISITES
Intro to Accounts Payable

COURSE OUTLINE

1. Expense Control Overview

2. Expense Control Setup

3. Expense Control Process Flows

Expense Control Demonstration

General Ledger

COURSE TITLE
GL II – Management Options

COURSE OVERVIEW
This course will introduce trainees to the management options related to the General Ledger module and their impact on processing.

COURSE LENGTH
1.5 Hours

CERTIFICATION CREDITS
1 Credit

RECOMMENDED COURSE PREREQUISITES
GL Application Immersion or Intro to GL

COURSE OUTLINE

1. MGNT (Management Options table) and GLOPTION (General Ledger Options table)

2. General Ledger related Management Options

COURSE TITLE
GL II – Reconciliation

COURSE OVERVIEW
This course will introduce trainees to the reconciliation, month-end, and year-end close processes in the General Ledger module. The trainee will be able to use reports to tie out the General Ledger module with other MRI products and close a period successfully.

COURSE LENGTH
1.5 Hours

CERTIFICATION CREDITS
1 Credit

RECOMMENDED COURSE PREREQUISITES
GL Application Immersion
GL MGMT Options
GL Tables
GL Journal Entries
GL Reporting

COURSE OUTLINE

1. Pre-Close/Reconciliation Activities

    a. Reconcile General Ledger Report with Additional Reports

    b. Closing Other Modules

2. Month-End Close

3. Year-End Close

COURSE TITLE
GL II – Reporting

COURSE OVERVIEW
This course will introduce trainees to the key run-time options, reports, and financial formats in the General Ledger module. Further, we discuss why clients might use them.

COURSE LENGTH
1.5 Hours

CERTIFICATION CREDITS
N/A

RECOMMENDED COURSE PREREQUISITES
GL Application Immersion
GL MGMT Options
GL Tables

COURSE OUTLINE

1. Run-time Options

2. Standard and Comparative Income Statement Reports

3. Trial Balance Report

4. General Ledger Report

5. Balance Sheet Report

6. General Journal Entry and Current Journal Entry Reports

7. Financial Formats

COURSE TITLE
GL II – Tables

COURSE OVERVIEW
This course will introduce trainees to the key tables in the General Ledger module and discuss the relationship between them. The trainee will gain insight into how cash maps, entities, calendars, and journal entries work together in GL.

COURSE LENGTH
1.5 Hours

CERTIFICATION CREDITS
N/A

RECOMMENDED COURSE PREREQUISITES
GL Application Immersion
GL MGMT Options

COURSE OUTLINE

1. PROJ - Project table

2. Entity Tables

   a. ENTITY – Entity table

   b. PERIOD – Calendar table

   c. BMAP – Cash Map table

3. JOURNAL – Current Journal Entry table

4. GHIS – Closed Period Journal Entry table

5. GLSUM – General Ledger Summary table and Additional Tables

COURSE TITLE
GL II – Journal Entries

COURSE OVERVIEW
This course will introduce trainees to the different types of manual and system created journal entries in the General Ledger module. The trainee will be able to create varying kinds of journal entries and understand how management options impact their creation.

COURSE LENGTH
1.5 Hours

CERTIFICATION CREDITS
N/A

RECOMMENDED COURSE PREREQUISITES
GL Application Immersion
GL MGMT Options
GL Tables

COURSE OUTLINE

1. Open Period Journal Entries

2. Recurring Journal Entries

3. Prior Period and Prior Year Journal Entries

4. System Created Journal Entries from Other Modules

5. Management Option Impact on Journal Entries

Commercial Management

COURSE TITLE
>CM II – Income Category Mapping

COURSE OVERVIEW
>This course will introduce trainees to the Income Category Mapping feature within Commercial Management setup. Upon completion of this course, the trainee will understand how to create and map income categories and security deposit income categories in CM.

COURSE LENGTH
>1.5 Hours

CERTIFICATION CREDITS
>1 Credit

RECOMMENDED COURSE PREREQUISITES
>CM Application Immersion or Intro to CM
>CM MGMT Options
>CM Tables

COURSE OUTLINE

1. Overview

   a. What are Income Categories

   b. Most Commonly Used Categories

2. Source Codes

3. GL Interface Chart

4. Security Deposit Income Categories

COURSE TITLE
CM II – Lease Administration

COURSE OVERVIEW
This course will introduce trainees to the leasing process within Commercial Management. We discuss moving tenants in, moving tenants out, transferring suites, and adding additional space leases.

COURSE LENGTH
1.5 Hours

CERTIFICATION CREDITS
N/A

RECOMMENDED COURSE PREREQUISITES
CM Application Immersion or Intro to CM
CM MGMT Options
CM Tables

COURSE OUTLINE

1. Move In Tenant

2. Move Out Tenant

3. Transfer Suites

4. Review of Master Occupant ID Relationship and Adding Additional Space Leases

COURSE TITLE

CM II – Management Options

COURSE OVERVIEW

This course will introduce trainees to the management options related to the Commercial Management module and their impact on processing.

COURSE LENGTH

1.5 Hours

CERTIFICATION CREDITS

1 Credit

RECOMMENDED COURSE PREREQUISITES

CM Application Immersion or Intro to CM

COURSE OUTLINE

1. MGNT (Management Options table) and CMOPTION (CM Options table)

2. Commercial Management related Management Options

COURSE TITLE
>CM II – Rentup/Statements

COURSE OVERVIEW
>This course will introduce trainees to the Rental Update feature within Commercial Management. We discuss the impact on tables and where this process fits in with the rest of the month-end close process. We also discuss how to run and distribute monthly statements to tenants.

COURSE LENGTH
>1.5 Hours

CERTIFICATION CREDITS
>N/A

RECOMMENDED COURSE PREREQUISITES
>CM Application Immersion or Intro to CM
>CM MGMT Options
>CM Tables
>CM Income Category Mapping
>CM Lease Administration

COURSE OUTLINE

1. Overview of Month-End Close Process

2. Review Tables Impacted by Rentup

3. Run Rentup in Edit and Update Modes and Discuss Difference

4. Print Statements for Tenants

    a. Discuss Scheduled Event for Emailing Statements

COURSE TITLE
> CM II – Tables

COURSE OVERVIEW
> This course will introduce trainees to the core tables used within Commercial Management. We discuss the relationship between each table and provide a high level overview of fields on each table.

COURSE LENGTH
> 1.5 Hours

CERTIFICATION CREDITS
> N/A

RECOMMENDED COURSE PREREQUISITES
> CM Application Immersion or Intro to CM
> CM MGMT Options

COURSE OUTLINE

1. BLDG - Building Table

2. SUIT - Suite Table

3. LEAS - Lease Table

4. CMRECC - Recurring Charges Table

5. CM Ledger Tables

COURSE TITLE

CM II – Transactions/Reconciliation

COURSE OVERVIEW

This course will introduce trainees to the Batch Entry and Month End Close features within Commercial Management. We discuss the different types of transactions and how to open/post batches. We also discuss the Journal Entry and Close Period functions under the Monthly Processing menu.

COURSE LENGTH

2 Hours

CERTIFICATION CREDITS

1 Credit

RECOMMENDED COURSE PREREQUISITES

CM Application Immersion or Intro to CM
CM MGMT Options
CM Tables
CM Income Category Mapping
CM Lease Administration
CM Rentup and Statements

COURSE OUTLINE

1. Discuss Opening and Posting Batches

2. Types of Transactions

3. Batch Entry Activity

4. Discuss Journal Entry and Data Flow to General Ledger Module

5. Create Journal Entries in Edit and Update Modes

6. Close Period

Residential Management

COURSE TITLE
RM II – Charge Codes and Security Codes

COURSE OVERVIEW
This course will introduce trainees to charge codes and security codes within Residential Management. We discuss creating charge codes and security codes, source codes, and mapping them to the general ledger.

COURSE LENGTH
1.5 Hours

CERTIFICATION CREDITS
1 Credit

RECOMMENDED COURSE PREREQUISITES
RM Application Immersion or Intro to RM
RM MGMT Options
RM Tables
RM Property Setup
RM Quick Rent Roll

COURSE OUTLINE

1. Charge codes

2. Security codes

3. Mapping of charge codes and security codes to the GL

4. Concession code mapping

5. Non-cash credit mapping

6. Prepayment mapping

COURSE TITLE

RM II – Leasing Process

COURSE OVERVIEW

This course will introduce trainees to the leasing process within Residential Management. We discuss working with guest cards, phone logs, unit selection, screening applicants, scheduling move-ins, and completing move-ins.

COURSE LENGTH

1.5 Hours

CERTIFICATION CREDITS

N/A

RECOMMENDED COURSE PREREQUISITES

RM Application Immersion or Intro to RM
RM MGMT Options
RM Tables
RM Property Setup

COURSE OUTLINE

1. Guest Card vs. Phone Log

2. Unit Search and Selection

3. Screening Options

2. Scheduling and Completing Move-ins on the Calendar

COURSE TITLE
RM II – Management Options

COURSE OVERVIEW
This course will introduce trainees to the management options related to the Residential Management module and their impact on processing.

COURSE LENGTH
1 Hour

CERTIFICATION CREDITS
1 Credit

RECOMMENDED COURSE PREREQUISITES
RM Application Immersion or Intro to RM

COURSE OUTLINE

1. MGNT (Management Options table) and RMOPTION (RM Options table)

2. Residential Management related Management Options

COURSE TITLE

RM II – Property Setup

COURSE OVERVIEW

This course will introduce trainees to property setup in Residential Management. We discuss property, building, unit type and unit level setup; default billing and leasing options; utilizing the quick rent roll; and some optional settings in the RM module.

COURSE LENGTH

2 Hours

CERTIFICATION CREDITS

1 Credit

RECOMMENDED COURSE PREREQUISITES

RM Application Immersion or Intro to RM
RM MGMT Options
RM Tables

COURSE OUTLINE

1. Property Setup

2. Building Setup

3. Unit Type Setup

4. Unit Setup

5. Billing Options

6. Leasing Options

7. Quick Rent Roll

8. Additional RM Settings

COURSE TITLE

RM II – Quick Rent Roll

COURSE OVERVIEW

This course will introduce trainees to the Quick Rent Roll within Residential Management. We discuss the process of adding residents to new properties and the tables involved in the process.

COURSE LENGTH

1 Hour

CERTIFICATION CREDITS

N/A

RECOMMENDED COURSE PREREQUISITES

RM Application Immersion or Intro to RM
RM MGMT Options
RM Tables
RM Property Setup

COURSE OUTLINE

1. Quick Rent Roll process

2. Tables associated with the QRR

    a. RMSETUP

    b. RMSETUPDTL

    c. RMSETUPOCCP

3. Commitment of the QRR

COURSE TITLE
RM II – Reconciliation

COURSE OVERVIEW
This course will introduce trainees to the month-end close and reconciliation processes within Residential Management. We discuss rentup, journal entries, closing, and reconciliation steps/reports.

COURSE LENGTH
1.5 Hours

CERTIFICATION CREDITS
1 Credit

RECOMMENDED COURSE PREREQUISITES
RM Application Immersion or Intro to RM
RM MGMT Options
RM Tables
RM Property Setup
RM Leasing Process
RM Rentup and Invoices
RM Transactions
RM Renewals
RM SODA

COURSE OUTLINE

1. Overview of Month-End Close Process

2. Rental Update

3. Journal Entries

4. Close Period

5. Reconciliation Reports/Steps

    a. Rent Roll

    b. Aged Delinquency

    c. Monthly Reconciliation Report

COURSE TITLE

RM II – Renewals

COURSE OVERVIEW

This course will introduce trainees to the renewal feature within Residential Management. We discuss creating renewals at the property and resident level, printing renewal letters, and accepting renewals.

COURSE LENGTH

1.5 Hours

CERTIFICATION CREDITS

1 Credit

RECOMMENDED COURSE PREREQUISITES

RM Application Immersion or Intro to RM
RM MGMT Options
RM Tables
RM Property Setup
RM Leasing Process
RM Rentup and Invoices
RM Transactions

COURSE OUTLINE

1. Renewal Worksheet

2. Creating Individual Renewals

3. Printing Renewal Letters

4. Accepting the Offer

COURSE TITLE
RM II – Rentup/Invoices

COURSE OVERVIEW
This course will introduce trainees to the Rental Update feature within Residential Management. We discuss the impact on tables and where this process fits in with the rest of the month-end close process. We also discuss how to run and distribute monthly invoices to residents.

COURSE LENGTH
1.5 Hours

CERTIFICATION CREDITS
N/A

RECOMMENDED COURSE PREREQUISITES
RM Application Immersion or Intro to RM
RM MGMT Options
RM Tables
RM Property Setup
RM Leasing Process

COURSE OUTLINE

1. Overview of Month-End Close Process

2. Review Tables Impacted by Rentup

3. Run Rentup in Edit and Update Modes and Discuss Difference

4. Print Invoices for Residents

COURSE TITLE
RM II – Statement of Deposit

COURSE OVERVIEW
This course will introduce trainees to the statement of deposit feature within Residential Management. We discuss the resident lifecycle, Statement of Deposit Account (SODA) creation, SODA processing, SODA printing, and completing SODAs.

COURSE LENGTH
1.5 Hours

CERTIFICATION CREDITS
1 Credit

RECOMMENDED COURSE PREREQUISITES
RM Application Immersion or Intro to RM
RM MGMT Options
RM Tables
RM Property Setup
RM Leasing Process
RM Rentup and Invoices
RM Transactions
RM Renewals

COURSE OUTLINE

1. SODA Creation

2. Breaking Down a SODA

    a. Forwarding Address
    b. Walkthroughs
    c. Lease Violations
    d. AR Tab
    e. Reversing Transactions

3. Printing SODA Reports

    a. Property Note Usage

4. Committing SODAs

COURSE TITLE
RM II – Tables

COURSE OVERVIEW
This course will introduce trainees to the core tables used within Residential Management. We discuss the relationship between each table and provide a high-level overview of fields on each table.

COURSE LENGTH
1.5 Hours

CERTIFICATION CREDITS
N/A

RECOMMENDED COURSE PREREQUISITES
RM Application Immersion or Intro to RM
RM MGMT Options

COURSE OUTLINE

1. RMPROP - Property table

2. RMBLDG - Building table

3. UNIT - Unit table

4. RMLEASE - Lease table

5. RMRECC - Recurring Charges table

6. RM Ledger Tables

COURSE TITLE
RM II – Transactions

COURSE OVERVIEW
This course will introduce trainees to the Batch Entry feature within Residential Management. We discuss the different types of transactions and how to open/post batches.

COURSE LENGTH
1.5 Hours

CERTIFICATION CREDITS
N/A

RECOMMENDED COURSE PREREQUISITES
RM Application Immersion or Intro to RM
RM MGMT Options
RM Tables
RM Property Setup
RM Leasing Process
RM Rentup and Invoices

COURSE OUTLINE

1. Discuss Opening and Posting Batches

2. Types of Transactions

3. Batch Entry Activity

COURSE TITLE
Screening Select

COURSE OVERVIEW
This course is designed to familiarize the trainee with the Screening Select interface and functionality in Residential Management. By the end of the course, the trainee will know the steps required to set up Screening Select, how to process a screening, and learn how to solve for common error messages.

COURSE LENGTH
1 Hour

CERTIFICATION CREDITS
1 Credit

RECOMMENDED COURSE PREREQUISITES
Intro to Residential Management

COURSE OUTLINE
1. What is Screening Select?
2. Setting up Screening Select
3. Using Screening Select
4. Solving for Common Screening Select Errors

Application Toolkit/Technical

COURSE TITLE

Intro to Database Design & Cabinet Maker

COURSE OVERVIEW

This course will introduce trainees to the Database Design and Cabinet Maker utilities in MRI. The first half is an overview of Database Design and how to effectively use it. The second half looks at using the Cabinet Maker tool to script out changes to the database and create custom cabinets. This course also covers some tips and tricks when code reviewing database changes.

COURSE LENGTH

2 Hours

CERTIFICATION CREDITS

1 Credit

RECOMMENDED COURSE PREREQUISITES

None

COURSE OUTLINE

1. Overview of Database Design

    a. What is the tool and why do we have it
    b. Overview of customization options and where the metadata is stored
    c. What is the System Catalog used for and what are "Swap Names"

2. Basics of using Database Design

    a. Creating tables, indexes, and foreign key relationships
    b. Best practices and tips to get the most out of the tooling
    c. Hands-on exercise of using the tool

3. Overview of Cabinet Maker

    a. What are database cabinets and how are they used
    b. Step by step guide to script out changes using cabinet maker
    c. An overview of how the update process works
    d. How to create custom cabinets and when they are used
    e. Best practices when scripting out changes to the database

COURSE TITLE

Intro to MRI Web Design

COURSE OVERVIEW

This course will introduce trainees to the MRI Web Design tool. The course explores the basics of how the tool is used to create web pages in MRI Web. This course covers the fundamentals of the rendering engine and how the tool works. The course is interactive and has trainees create a new web page to gain experience with the different concepts and controls.

COURSE LENGTH

2 Hours

CERTIFICATION CREDITS

N/A

RECOMMENDED COURSE PREREQUISITES

None

COURSE OUTLINE

1. Overview of MRI Web Design

    a. What is the tool and why do we have it
    b. Basics of the rendering engine that powers MRI Web Design
    c. Exploring the layout and makeup of pages in MRI Web

2. Hands-on Lab creating a page using MRI Web Design

    a. Creating a new page and hooking it up to the application menu
    b. Using basic controls and properties
    c. Overview of expressions in MRI
        i. Exploring Client vs Server commands
    d. Basics of grids and binding pages to the database
    e. Linking to other pages
    f. Using code behind for complex logic
        i. Overview of how this works
        ii. When to use code behind and when to use toolkit functions

COURSE TITLE
Report Design I

COURSE OVERVIEW
This course will introduce trainees to the Report Design application. We discuss creating reports, copying reports, segment types, adding cells to segments, etc. By the end of this session, the trainee should be able to create a basic report in Report Design.

COURSE LENGTH
3 Hour

CERTIFICATION CREDITS
N/A

RECOMMENDED COURSE PREREQUISITES
Database Schema
SQL I
Product knowledge is a plus

COURSE OUTLINE

1. Toolbar

    a. File Menu
    b. Align to Rule
    c. Define Icons

2. Define Segment Types

    a. Primary Segments
    b. Secondary Segments
    c. Total Segments

3. Copy Reports

    a. MRI Reports Cannot be Modified
    b. Benefits of Copying Reports

4. Creating Reports

    a. Selecting the Base Table
    b. Runtime Options
    c. Copy Report Header
    d. Adding Segments

5. Adding Cells to Report

    a. Labels
    b. Calculation Fields
    c. Drag and Drop Functionality

COURSE TITLE

Report Design II

COURSE OVERVIEW

This course is a continuation of Report Design I and focuses on advanced report functions and financial reports. We discuss using SQL to pull data rather than dragging and dropping from tables and additional report design functions like trim, now, getdate, etc. We also discuss web enabling reports.

COURSE LENGTH

3 Hour

CERTIFICATION CREDITS

1 Credit

RECOMMENDED COURSE PREREQUISITES

Report Design I
Database Schema
SQL I
SQL II is a plus for building advanced reports
Product knowledge is a plus

COURSE OUTLINE

1. Functions

    a. Pulling data from tables using query
    b. Function library in expression box
    c. Trim
    d. Referencing cells in other cells
    e. Memo Cells
    f. Skip Expressions

2. Total Segments

    a. Subtotals
    b. Grand Totals

3. Financial Reports

    a. Financial Formats
    b. Segment Types
    c. Numpd and Selpd Functions

4. Web Enabling Reports

COURSE TITLE
SSRS I

COURSE OVERVIEW
This course is designed to familiarize the trainee with basic report building in SSRS. By the end of this course, the trainee will be able to create reports in Visual Studio and import them into Report Gateway.

COURSE LENGTH
3 Hour

CERTIFICATION CREDITS
1 Credit

RECOMMENDED COURSE PREREQUISITES
Report Design I
Database Schema
SQL I
SQL II is a plus for building advanced reports
Product knowledge is a plus

COURSE OUTLINE

1. Create table reports

2. Format reports

3. Create basic and complex expressions

4. Group report data

5. Create matrix reports

6. Sort and filter dataCreate parameter reports

7. Uploading SSRS reports to MRI

8. Print and export reports

9. Addition of MRI security layer to SSRS reports

COURSE TITLE
SSRS II

COURSE OVERVIEW
This course is designed to build on the fundamentals of the first SSRS course. By the end of this course, the trainee will be able to build both financial and standard reports in Visual Studio that can have drill down functionality as well as graphing capabilities.

COURSE LENGTH
3 Hour

CERTIFICATION CREDITS
1 Credit

RECOMMENDED COURSE PREREQUISITES
Report Design I
Database Schema
SQL I
SQL II is a plus for building advanced reports
SSRS I
Product knowledge is a plus

COURSE OUTLINE

1. SSRS development environment requirements and configuration

2. MRI Financial vs standard reports

3. Adding hyperlinks to MRI pages or drilldown data

4. Best practices for developing MRI reports

5. Add images

6. Add drilldown and drill through functionality

7. Summarize data with charts, spark lines, data bars, and indicators

COURSE TITLE
> Web Design I

COURSE OVERVIEW
> This course will introduce trainees to the Web Design application. We discuss activity groups versus pages; the toolbar; copying and creating pages and groups; and linking custom pages.

COURSE LENGTH
> 3 Hours

CERTIFICATION CREDITS
> N/A

RECOMMENDED COURSE PREREQUISITES
> Database Schema
> SQL I
> Product knowledge is a plus

COURSE OUTLINE

1. Activity Groups vs. Pages

    a. Difference between Groups and Pages

    b. Identifying the Group and Page in MRI Web

2. Toolbar Options

    a. File Menu

    b. Define Icons

3. Copying Activity Groups and Pages

    a. Cannot modify MRI standard pages

    b. Benefits of copying pages and groups

4. Creating new Activity Groups and Pages

    a. Selecting Base Table

    b. Copying existing pages into new group

5. Linking Custom Pages

    a. Customize Menus

        i. Web Menu Security

    b. Customize Page Links

    c. Differences between MRI standard page and custom page

COURSE TITLE
Web Design II

COURSE OVERVIEW
This course is a continuation of Web Design I and focuses on advanced functions. We discuss the creation of frames and grids. We learn to pass variables from one page to another. We also discuss web enabling reports.

COURSE LENGTH
3 Hours

CERTIFICATION CREDITS
1 Credit

RECOMMENDED COURSE PREREQUISITES
Web Design I
Database Schema
SQL I
SQL II is a plus for building advanced web pages
Product knowledge is a plus

COURSE OUTLINE

1. Functions

    a. Function library in expression box

    b. Pulling data from tables using query

2. Frames

    a. Creating Frames

    b. Updating Frames

3. Grids

    a. Drag and Drop Fields

    b. Triple Click Feature

    c. Command Buttons

    d. Passing Variables

COURSE TITLE
SaaS Login/Navigation

COURSE OVERVIEW
This course provides directions on how to login to the SaaS environment to access client databases and navigate appropriately.

COURSE LENGTH
1 Hour

CERTIFICATION CREDITS
N/A

RECOMMENDED COURSE PREREQUISITES
None

COURSE OUTLINE

1. Creating bookmarks for different SaaS versions

2. Navigating client environments

COURSE TITLE
Security Console/Security Manager

COURSE OVERVIEW
This course provides an in-depth look at the Security Console within the MRI Software application and how it controls all user activity as well as the SaaS security Manager tool and how administrators use this to add/delete users.

COURSE LENGTH
2 Hours

CERTIFICATION CREDITS
1 Credit

RECOMMENDED COURSE PREREQUISITES
None

COURSE OUTLINE

1. Add/Maintain users in an MRI database

2. Database security setup and maintenance

3. Menu security setup and maintenance

4. Table security setup and maintenance

5. Report security setup and maintenance

6. Entity security setup and maintenance

7. What is Security Manager?

8. How does a User login?

9. User Management

10. Adding a User

11. Deleting/Restoring/Copying Users

12. Setting User Security Assignments

13. Creating Secondary Users

COURSE TITLE
SQL I

COURSE OVERVIEW
This course will introduce trainees to the basics of SQL Queries including Select, Insert, Update, and Delete statements.

COURSE LENGTH
2 Hours

CERTIFICATION CREDITS
N/A

RECOMMENDED COURSE PREREQUISITES
None

COURSE OUTLINE

1. Select Statements

    a. Selecting "All" Records in a Table

    b. Selecting Specific Columns

    c. Where Clauses

    d. Ordering By

2. Best Practices when Modifying Data

    a. Using Select Statements First

    b. Telling a Story with Queries

    c. Saving Backups of Data

3. Insert Statements

4. Update Statements

5. Delete Statements

COURSE TITLE
SQL II

COURSE OVERVIEW
This course is the continuation of SQL I and focuses on advanced query language. We discuss primary and foreign keys, join queries, protecting data using temporary tables, and some additional functions.

COURSE LENGTH
2 Hours

CERTIFICATION CREDITS
1 Credit

RECOMMENDED COURSE PREREQUISITES
SQL I

COURSE OUTLINE

1. Primary and Foreign Keys
   a. MRIINDEX
   b. MRIRELN
2. Protecting Data
   a. Temporary Tables
   b. Update Queries
   c. Drop Tables
3. Aliases
4. Join Queries
   a. Inner Join
   b. Left Join
   c. Right Join
5. Sub Queries
6. Additional Functions
   a. Unions
   b. Coalesce
   c. Substring
   d. Concatenate
   e. Datepart

COURSE TITLE

Import/Database Restore Processes

COURSE OVERVIEW

This interactive course provides the trainee with step-by-step processes for importing data and restoring backups of databases.

COURSE LENGTH

1 Hour

CERTIFICATION CREDITS

N/A

RECOMMENDED COURSE PREREQUISITES

Basic MRI application knowledge

COURSE OUTLINE

1. Utilizing Database Restore Tool

2. Linking restored database to an MRI installation

3. Preparing/Reviewing data within Excel prior to importing

4. Importing data from Excel into MRI

COURSE TITLE
MIX API

COURSE OVERVIEW
This course will introduce trainees to the MRI Information Exchange solution. The course will teach how to create a MIX API from the ground up and test APIs for viability.

COURSE LENGTH
1 Hour

CERTIFICATION CREDITS
1 Credit

RECOMMENDED COURSE PREREQUISITES
None

COURSE OUTLINE

1. Standard Web Design functions when designing APIs
2. Example MIX APIs and where to find them
3. Testing MIX APIs
4. Building APIs in MIX

Appendix

Recommended Courses for Each Certification

The Pre-Requisite courses listed below can be taken in preparation for the exam. The Pre-Requisite exam is required for all individuals who are new to the certification program.

Pre-Requisite Exam

- Database Schema
- Certification Overview
- MAX/MyMRI Portal (Documentation Only)
- MRI Basics (MELL Only)

The recommended courses listed below can be taken in preparation for each certification exam.

Financials Certification

Accounts Payable Module
- AP II – Bank Reconciliation
- AP II – Check Processing
- AP II – Closing Procedures
- AP II – Management Options
- AP II – Reporting
- AP II – Tables
- AP II – Invoices
- 1099/CRP Training
- Expense Control

General Ledger Module
- GL II – Management Options
- GL II – Reconciliation
- GL II – Reporting
- GL II – Tables
- GL II – Journal Entries

Commercial Management Certification

Commercial Management Module
- CM II – Income Category Mapping
- CM II – Lease Administration
- CM II – Management Options
- CM II – Rentup/Statements
- CM II – Tables
- CM II – Transactions/Reconciliation

Residential Management Certification

Residential Management Module
- RM II – Charge Codes and Security Codes
- RM II – Leasing Process
- RM II – Management Options
- RM II – Property Setup
- RM II – Quick Rent Roll
- RM II – Reconciliation
- RM II – Renewals
- RM II – Rentup/Invoices
- RM II – Statement of Deposit
- RM II – Tables
- RM II – Transactions
- Screening Select

Technical Certification

Application Toolkit
- Intro to Database Design & Cabinet Maker
- Intro to MRI Web Design
- Report Design I
- Report Design II
- SSRS I
- SSRS II
- Web Design I

- Web Design II
- SaaS Login/Navigation
- Security Console/Security Manager
- SQL I
- SQL II
- Import/Database Restore Processes
- MIX API