Introduction to Voyager 7s

Voyager is the Primary operating system used by both Accounting and Property Management. In addition to the basic tools available in the program, this document will also provide guidance on some features as used by Harsch.

Login Page

Use the Forgot Password to have an email sent with a link to reset password. Click for more detailed instructions.

Adding the link to Favorites Bar in Internet Explorer

Verify website URL/address is https://www.yardiasp.com/85041harsch/pages/Login.aspx - to add to Internet Explorer Toolbar Favorites:

1. Click Icon (Star with green arrow) or go to Menu Favorites / Add to Favorites bar
2. Button titled "Login" will appear; to rename, Right-click on "Login" icon and select rename
Databases

Live is Production or where we do our production, real-time data entry, and reporting. Other Databases copies of Live from a previous date for various testing purposes.

Log Out

When done with the program, in the top Title menu to the far right, select "Log Off"

Roles

Roles will define what the User's default screen will look like, and are also referred to as menus sets. These are customized for Harsch use and specified for Commercial, Residential, Accounting, Construction and Maintenance, etc. All of the Harsch specific roles start with an asterisk (*).

When changing roles the current role that you are in will not show in your list of options.
Basic Features

Navigation Features
Menu Search

The menu search feature allows you to quickly find a menu item. Enter a word, phrase, or partial word in the search box, and Voyager immediately returns the matching menu items.

HIP Quick Menus

The HIP Quick menus screen are a listing of the most common items and reports broken out by type and is available in all roles.

Main Quick Menu

This Quick Menu is used for the weekly Managers Meeting reports, Quarterly Reports package reports, and reports for Budgeting.
Quarterly Budgets Menu

This Quick Menu is used for the weekly Managers Meeting reports, Quarterly Reports package reports, and reports for Budgeting.
The Construction and Maintenance menu contains the most common functions, reports, and Dashboards for these components.

Training & Reference

The Training and Reference Menu is being developed as a place to find resources, reports for testing and to submit support requests.

It is currently under development and additional items will be added based upon demand.
Help Button

To get on-line documented assistance Yardi, from the top Title menu, select the word "Help". On most screens, there is also a "help" button that may be specific to the function on the screen.
Links Button

The Links button opens the Links menu. Depending on the screen, the Links menu has various names: Links, Functions, Data, and so on. The button label reflects the menu title. For example, for the Functions menu, the button label is Functions, not Links.

Favorites

When you click the Favorites icon, Voyager displays a list of menu items that you have designated as “favorites.” Select an item to open the corresponding screen.

The Favorites menu is linked to the user and the current role/menu set. Each user can build and maintain a favorites menu for each Voyager module he/she uses.
Adding Items to the Favorites Menu

To add an item to the Favorites menu, locate it on the side menu, and right-click. The Add to Favorites box appears. Select it.

Deleting Items from Favorites Menu

To delete an item from the Favorites menu, right-click it and select Delete.
History

When you click the History icon, Voyager displays a list of the menu items selected in the current session. Click on an item to return to that screen.

By design, the History feature only tracks items selected from the menu, not links from the dashboard or inside an Analytic Report.
**Filter Search Results**

When you use a filter to search, the results appear in a box in the main screen. You can minimize the results by clicking the Search Results Icon.

The box disappears. The search results persist, and you can bring them back by clicking the icon again.

![Image of Filter Search Results](image)

**Multiple Searches**

If you search for another item, the search results box retains the original search results and displays a new tab for the second search. A third search will result in a third tab, and so on. To close a tab, click the “X” to the right of the name.

This can also be used for multiple selections, i.e. Filter on only the property but use the "Search:" box to look various tenants within that property(s)
Refresh Button in Search Results

The Search Results box contains a **Refresh** button that will rerun the original search.

In the example below, we searched for the “austr_1” customer record. There were no results because the record had been given the wrong code. We then located the record and changed the code.

Later on, we wanted to access the record. Instead of repeating the search, we just clicked the Refresh button in the Search Results window, and the record appeared on the screen.
The Site Search function on the upper right-hand side of the screen allows the user to easily search all types of database records in Voyager, such as vendors, leases, contacts or banks and quickly generate a list of matching records without having to browse menus or lookup lists. If a record is not connected to a property, it will not appear in a search of this type. For example, a vendor record that does not include any links to properties will not appear.
Using a Search Code

Search Codes can be used to narrow down Search results. For example, to search for vendors, “V,” followed by a colon and the search term.
List of Available Search Codes

The following table gives the search codes for each record type. It also lists the database fields that are searched for each record type.

<table>
<thead>
<tr>
<th>Record Type</th>
<th>Search Code</th>
<th>Table Columns Searched</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job</td>
<td>Job</td>
<td>Code, Description, Site Address, Site City, Site Zip</td>
</tr>
<tr>
<td>CommercialDeal</td>
<td>CommDeal</td>
<td>Code, Description</td>
</tr>
<tr>
<td>Memo</td>
<td>Memo</td>
<td>Description</td>
</tr>
<tr>
<td>Bank</td>
<td>Bank</td>
<td>Code, Description</td>
</tr>
<tr>
<td>Tenant</td>
<td>Resident</td>
<td>Code, LastName, Address1, Address2, City, State, Zip Code</td>
</tr>
<tr>
<td>Owner</td>
<td>O</td>
<td>Code, Last Name, Reg. No</td>
</tr>
<tr>
<td>Unit</td>
<td>U</td>
<td>Code</td>
</tr>
<tr>
<td>Charge type</td>
<td>ChargeType</td>
<td>Code, Description</td>
</tr>
<tr>
<td>Vendor</td>
<td>V</td>
<td>Code, LastName</td>
</tr>
<tr>
<td>Contract</td>
<td>Contract</td>
<td>Code, Description</td>
</tr>
<tr>
<td>Account</td>
<td>Acct</td>
<td>Code, Description</td>
</tr>
<tr>
<td>Property</td>
<td>P</td>
<td>Code, Address1, Address2, Address3, City, State, Zip Code</td>
</tr>
<tr>
<td>Customer</td>
<td>Customer</td>
<td>Code, Name</td>
</tr>
</tbody>
</table>

Default Hot Keys

Two global keyboard combinations are included as defaults

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Alt+Y</td>
<td>Closes the Search Results window (or re-opens it, if it is already closed).</td>
</tr>
<tr>
<td>Alt+M</td>
<td>Collapses the side menu (or expands it, if it is already collapsed).</td>
</tr>
</tbody>
</table>

Error Messages

Error messages appear in a red box at the top of the screen. To make the error message disappear, you can click anywhere in the red box. (You don’t have to click precisely on the “X” -- anywhere in the red box is fine.)

When you revise the entry that caused the error or click anywhere else on the screen, the error message disappears.
Warning Messages

Warning messages will display at the top of the entry screen and can be scrolled through by using the arrow buttons on the right of the message.

Time Out

30 Minutes is the longest that a screen can remain inactive during a data-entry session. When the timeout limit is reached, Voyager displays a message stating that the page has expired. To continue data entry, the user must return to the screen and re-enter previously unsaved data, as needed.

After 2 hours of inactivity, a session expiration message appears. Users must then log on to Voyager again to start a new session.
AJAX Enhancement

For many fields that are linked to lookup lists, Voyager 7S offers faster data entry through a software tool called Ajax (Asynchronous JavaScript and XML).

Ajax is an “auto-complete” function where you type a few characters, and Ajax looks for records that start with those characters. It displays them on the screen, and you select the one you are looking for.

Ajax will now search for codes, not just descriptions. If you only remember part of a code, you can enter a few characters and Ajax will return any matches.

Most Popular Reports

Analytics

With Yardi Voyager Analytics, you can generate standard and custom reports. You can display results on screen and publish reports to PDF and Excel. Analytics reports are fast, but they do not offer formatting options. If you require special formatting, you can export the report to Excel or PDF and edit the report with those applications.

Analytics use similar filters to display different reports, there will be a Report Type filter selection that details out the different reports that are available.
Harsch Custom Reports

Most of the reports written internally and specific to Harsch can be found at Harsch Financial Reports. Reports available include the Operating Statement, Rent Roll, Lease Expiration Report, Aged Receivables with Memos, and many more. For more information, please refer to the Yardi Community on HIPnet or with Software Support.

Report Runner (Conductor)

Voyager uses Yardi Report Runner, part of Yardi Service Manager, for processing reports through a separate server. You can access Conductor Report Monitor, which lists the reports Report Runner is processing, through Voyager. This is recommended for long-running reports as the processing is offloaded to another server allowing you to continue actively working in your current session.
When you choose to Email or Save a report as the Destination, an additional window will appear to keep you updated on the status. When complete, you will either receive the email in Outlook or the File hyperlink will become active and can be clicked on to open the report.

💡 The screen will refresh every 30 seconds automatically, or you can click on the refresh button to update the screen.

Harsch Voyager Report Guides

Report guides for many of the Harsch and Yardi reports can be found here:

http://harsch.screenstepslive.com/s/Harsch_Voyager_Documentation

Instructions for use can be found here:

http://harsch.screenstepslive.com/s/Harsch_Voyager_Documentation/m/61908/l/639530
Software Support

For further questions, email Software Support at software@harsch.com

Or call the Home Office in Portland: (503) 242-2900

Angie Van Riper - ext. 236

Lan Nguyen - ext. 804