Introduction to Voyager 7s (HUD)

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.

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

Adding the link to Favorites Bar in Internet Explorer

Verify website URL/address is https://www.yardiasp14.com/33260harsch/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

Update Profile

The first time you log in you will need to update your Profile with your name, put your first and last name in the appropriate fields and the click the Save button.

Sign Out

When done with the program, in the top Title menu to the far right, select "Sign Out"

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 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.*
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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.

Help Button

To get on-line documented assistance, 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.
Function/Data/Reports Buttons

These buttons open an additional menu pertaining to the screen that you are on. Depending on the screen, these menus have various names: Functions, Data, Reports and so on. The button label reflects the menu title.
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, and will change when changing roles.

Favorites are displayed in the order they are created.

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.

![Favorites menu]

Right click 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.

⚠️ Clicking on the dash next to the Search Results icon will close all of the search results.

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.

Site Search

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 vendor and residents to quickly generate a list of
matching records without having to browse menus or look up 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>Commercial Deal</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, ZipCode</td>
</tr>
<tr>
<td>Owner</td>
<td>O</td>
<td>Code, LastName, 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, Last Name</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, ZipCode</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

<table>
<thead>
<tr>
<th>Key Combination</th>
<th>Description</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.
HIP Monthly Procedures Quick Menu

The HIP Procedures Quick Menu is a collection of the procedures required for 50059 and Tax Credit processing, as well as a listing of most of the 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.
**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.
Software Support

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