

# Voyager Interface Basics

## *VOYAGER SYSTEM JOB AID*

### Overview

This Voyager System job aid provides you with the information about the basic functions in Voyager. There are several processes that you will encounter repeatedly, such as navigating in Voyager, performing searches, and generating reports. This job aid outlines how to execute those functions.

### Job Roles

The job roles responsible for completing this job aid include employees at the Atlanta Housing Authority (AHA) who access the Voyager system.

### Prerequisites

Users of Voyager must have a user ID and password to log on to the system.

## VOYAGER INTERFACE BASICS

### Contents

Comparison of AHA and Voyager Terms.....	3
Navigation Overview.....	5
Login Screen.....	5
Home Screen.....	6
Home Screen Menus.....	7
Key Screens and Required Fields.....	10
Resident Screen.....	11
Family Detail Info Screen.....	13
Unit Screen.....	16
Vendor Screen.....	18
Required Fields.....	21
Searching with Filters.....	22
Search by a Specific Record.....	22
Search by Typing Information into the Field.....	23
Search by Clicking the Field Label Links and Using the Filter Window.....	24
Search Using the Wildcard Character (%).....	28
Search by Person.....	30
Generating Reports.....	31
Run Reports from the Home Screen.....	31
Run Reports from Individual Screens.....	33
Run Reports from the Side menu.....	35
Export a Report to Excel.....	36
Create Memos.....	38
Creating a Manual Memo.....	38

## VOYAGER INTERFACE BASICS

### Comparison of AHA and Voyager Terms

Here are some key terms that show a comparison between how they are currently referenced within AHA and how the same term is referenced within Voyager.

AHA Term	Voyager Term
Housing Services Administrator	Caseworker
Client ID	T-Code
Vendor Number	V-Code
Landlord, Property Mgmt Co., Owner	Vendor
Public Housing Authority (PHA)	PHA Code
Participant	Applicant, Resident, Tenant
Program	Property
Unit	Unit
Service Request Number (SR#)	Inspection ID Number



*In the current state process “units” are defined as physical units in which participants live. Within the Voyager system, there are “virtual” units where people live for the sake of recordkeeping.*

## VOYAGER INTERFACE BASICS

## VOYAGER INTERFACE BASICS

### Navigation Overview

This section provides an overview of navigating within Voyager. You will also learn how to use the menus, key screens, and search capabilities.



*If you do not have access to Voyager or your access role is incorrect, submit a Footprint.*

### Login Screen

When logging on to Voyager, use the login information provided by your system administrator. When you log on to Voyager, the database defaults to Production. The Production database is the database you will use as you work in Voyager. After entering your user name and password, click **Submit**.

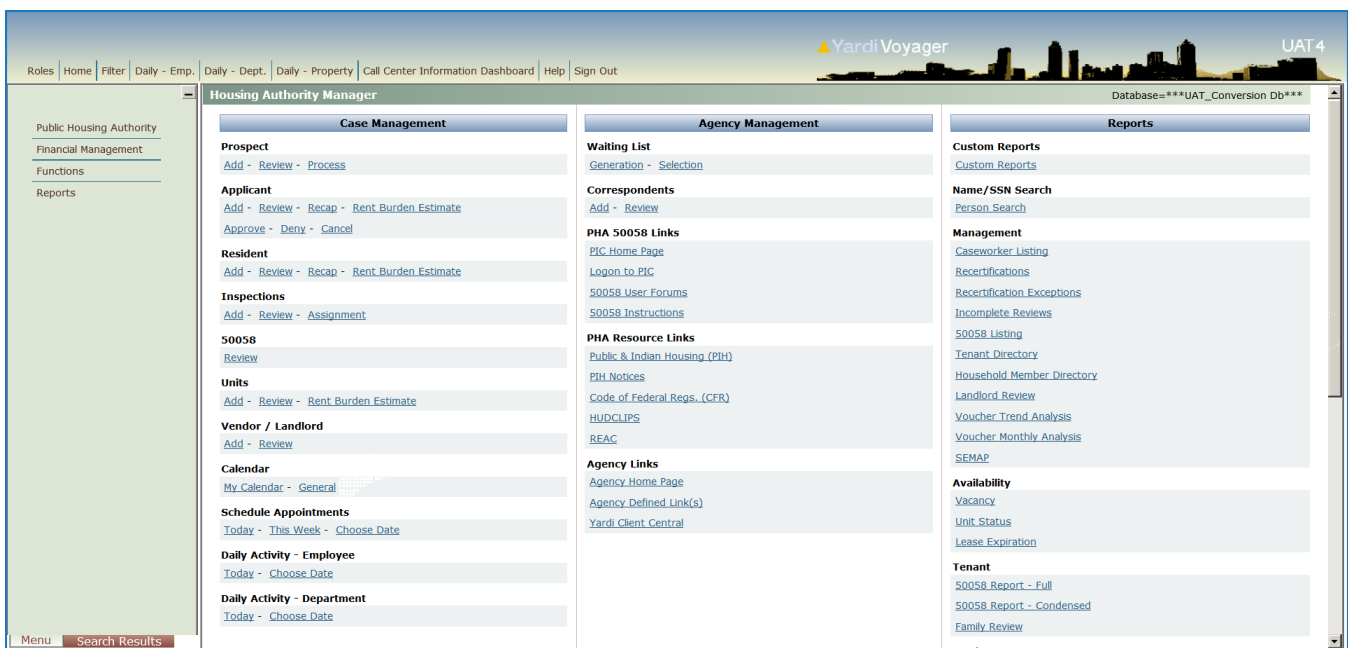


The screenshot shows the Voyager login interface. At the top, it says "Yardi Voyager" on the left and "Production" on the right. Below this is a header image of a city skyline. The main content area is divided into two columns. The left column is titled "Admin Information" and contains the text: "Please enter your username, password, and platform. For information regarding your login data, please contact your system administrator. [Server Team](#) PreProd is Located [Here](#)". The right column is titled "Login Information Voyager" and contains a form with three input fields: "User Name", "Password", and "Database" (which is a dropdown menu currently set to "Production"). Below these fields is a "Submit" button. At the bottom of the screenshot is the AHA logo, which consists of the letters "AHA" in a bold, black, sans-serif font with a blue circle behind the "A", and the text "Atlanta Housing Authority" below it.

# VOYAGER INTERFACE BASICS

## Home Screen

When you first log on to Voyager, your **Home** screen displays. Based on your log in, the **Home** screen is associated with your job role and responsibilities. For example, if you are a Housing Services Administrator, your **Home** screen reflects your role and the tasks you must complete. The following image is an example of a Housing Authority Manager’s **Home** screen. It has menus, sections, and links related to the role of a Housing Authority Manager. The **Home** screen allows easy access to the features and options the Housing Authority Manager needs.



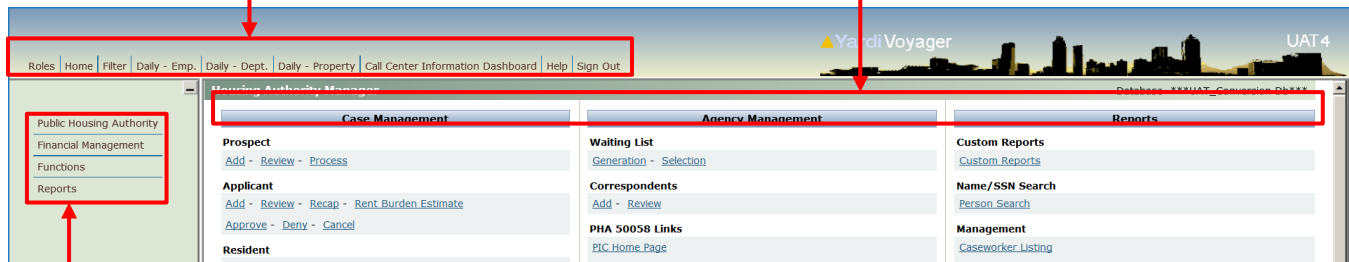
# VOYAGER INTERFACE BASICS

## Home Screen Menus

The **Home** screen has three distinct menus: The **Top** menu, the **Side** menu, and the **Quick** menu.

The **Top** menu provides access to the basic areas of Voyager.

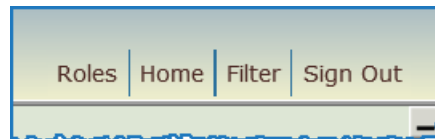
The **Quick** menu offers the menu choices you use most often.



The **Side** menu provides access to tasks and procedures via

## Top Menu

Use the **Top** menu (skyline) to move quickly to basic areas of Voyager and to access frequently used tasks.



The most common options available in the **Top** menu are:

<b>Roles</b>	Use this option to select a specific job role depending on the tasks you need to complete.
<b>Home</b>	Use the Home option to return to your Home screen from any area in Voyager.
<b>Filter</b>	Use this option to quickly find information in your Voyager database. Filters allow you to specify the results you receive when performing a search in Voyager. This option is not active on the Home page when you initially log on.
<b>Sign Out</b>	Use this option to exit the Voyager system.

## VOYAGER INTERFACE BASICS

### Side Menu

The **Side** menu displays on the left side of the **Home** screen. It provides access to tasks and procedures via submenus. The menu items depend on your role, so you have access to the items necessary to perform your job. The following example **Side** menu is for the Customer Services Group.



The most common options on the **Side** menu are:

<b>Public Housing Authority</b>	Contains many of the administrative functions in Voyager.
<b>Financial Management</b>	Contains financial functions.
<b>Functions</b>	Contains popular functions you use based on your job role.
<b>Reports</b>	Contains reports that you can generate based on your job role.

### Quick Menu

The **Quick** menu provides an easy way to work on the tasks that you perform most often. Menu items are organized into sections according to their task type. Each menu item contains links to the actual task. This area of the **Home** page is also referred to as the Dashboard.

Your **Quick** menu options depend on your role. The following **Quick** menu snippet is from the Customer Services Group.



# VOYAGER INTERFACE BASICS

Customer Services Group Main Menu Database=\*\*\*UAT\_Conversion Db\*\*\*

Case Management	Agency Management	Reports
<b>Applicant</b> <a href="#">Add</a> - <a href="#">Review</a> - <a href="#">Recap</a> - <a href="#">Rent Burden Estimate</a> <a href="#">Approve</a> - <a href="#">Deny</a> - <a href="#">Cancel</a>	<b>Waiting List</b> <a href="#">Add</a> - <a href="#">Review</a> <a href="#">Generation</a> - <a href="#">Selection</a>	<b>Custom Reports</b> <a href="#">Custom Reports</a>
<b>Resident</b> <a href="#">Add</a> - <a href="#">Review</a> - <a href="#">Recap</a> - <a href="#">Rent Burden Estimate</a>	<b>Correspondents</b> <a href="#">Add</a> - <a href="#">Review</a>	<b>Name/SSN Search</b> <a href="#">Person Search</a>
<b>Inspections</b> <a href="#">Add</a> - <a href="#">Review</a> - <a href="#">Assignment</a>	<b>PHA 50058 Links</b> <a href="#">PIC Home Page</a> <a href="#">Logon to PIC</a> <a href="#">50058 User Forums</a> <a href="#">50058 Instructions</a>	<b>Management</b> <a href="#">Caseworker Listing</a> <a href="#">Recertifications</a> <a href="#">Recertification Exceptions</a> <a href="#">Incomplete Reviews</a> <a href="#">50058 Listing</a> <a href="#">Tenant Directory</a>
<b>50058</b> <a href="#">Review</a>		
<b>Units</b> <a href="#">Add</a> - <a href="#">Review</a> - <a href="#">Recap</a> - <a href="#">Rent Burden Estimate</a>		

# VOYAGER INTERFACE BASICS

## Key Screens and Required Fields

This topic highlights several of the screens that users regularly access.

Screen access in Voyager depends on your role and assigned responsibilities. There are four screens that are considered key screens within Voyager:

- Resident
- Family Detail Information
- Unit
- Vendor (Landlord)

The screenshot displays four overlapping windows from the Voyager system:

- Vendor Window:** Shows details for vendor 'V0000091' (AHA Authority Reserve) with contact information and address: Perry Homes Phase IV Escrow, 230 John Wesley Dobbs Avenue NE, 5th Floor - Finance, Atlanta, GA 30303-2429.
- Family Detail Info Window:** Displays family information for unit 'yo\_mtw' and tenant 't1027004'. It includes fields for Owner (v0204209), Last Action (2-Annual), Current Action (3-Interim), and Effective Date (06/01/2013).
- Unit Window:** Shows unit details for '13455' at '1265 CAMPBELLTON RD SW', Atlanta, GA 303104056. The unit type is Public Housing.
- Resident Window:** Displays resident information for 'LOUGENE MI' (Last Name COSBY) at address '650 ABBERLEY WAY, APT 1, STONE MOUNTAIN, GA 30083-6356'.

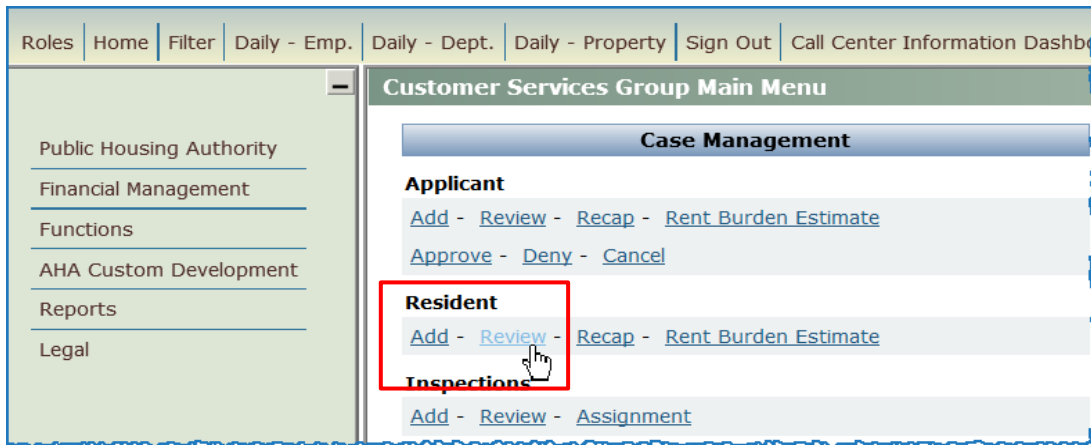
Each window includes various data entry fields, buttons (Edit, New, Close, Help), and navigation tabs (General, Other Info, Tax Info, etc.).

## VOYAGER INTERFACE BASICS

### Resident Screen

The **Resident** screen provides pertinent information about the AHA participant, including property, lease, and deposit details.

To access a **Resident** screen, you must first search for the resident’s record. From your **Home** screen, locate the **Resident** Quick link, and click **Review**.



The **Resident** search and filters display.

The screenshot shows the 'Resident' search and filters display. It includes the following fields and options:

- Property**: Text input field
- Unit**: Text input field
- Resident**: Text input field containing 't1027004' and 'HICKSON, RITA (vo\_mtw, 3880:'
- Last Name**: Text input field
- Telephone Nos.**: Text input field
- Status**: Dropdown menu
- Lease Expires**: Text input field with a calendar icon, followed by '-to-' and another text input field with a calendar icon.
- Notes**: Text input field
- Display Rows**: Text input field containing '5000'

At the bottom of the form are three buttons: **Submit**, **Clear**, and **Help**.

Use the search options and filters available on this screen to locate the resident’s record. If you know any of the resident’s information, enter it in the applicable field and then click **Submit**.

# Voyager Interface Basics

## VOYAGER SYSTEM JOB AID

The **Resident** screen contains information about AHA program participants.

The top portion of the **Resident** screen contains information about head of household and property.

### Screen Tabs

**Lease Info:** helps track the rent amount and occupancy dates

**Deposit Info:** contains deposit details and calculations

**Lease Charges:** provides details about charges

**Other Info:** contains emergency contact and vehicle details

**Resident**

First Name: VANESSA MI

Last Name: JACKSON

Address: 2040 FAIRHAVEN CIR NE  
UNIT A

City-St-Zip: ATLANTA GA 30305-4313

E-mail:

Alt. E-mail:

Office:

Home: (770) 873-9761

FAX:

Mobile:

**Property Info**

Resident ID: t1031666

Property: vo\_nomtw

Unit: 00000003

Status: Past

Legal: N/A

Payment Method: Any

Payable Method: EFT

Save

New

Help

**Lease Info** | Deposit Info | Lease Charges | Other Info

**Lease Information**

Mkt. Rent: 0.00 Rent: 0.00

Due Day: 1 Other Charges: 0.00

Move In: 02/01/2009 Total Charges: 0.00

Lease Sign: Notice: 08/01/2011

Lease From: 02/01/2009 Move Out: 10/31/2009

Lease To: 10/31/2009 Lease Desc:

Last Renewal: Responsibility Date:

Subsidized

**Late Fee**

Base %: 0.00 % Owed-total:

Grace Period: 6

2nd %: 0.00 % Owed-total:

2nd Grace: 0

Max %: 0.00 % Owed-total:

\$/day: 0.00

Max # Days: 0

Minimum Due: 0.00

**Functions**

[Deposit Accounting](#)

[Cancel Move Out](#)

[Assign Unit](#)

[Charge](#)

[Transfer To Property](#)

[Abatement](#)

[PRH Tenant Hold](#)

[Tenant Payment Agreement](#)

[Legal](#)

[Credit Check](#)

**Data**

[Family Detail Info](#)

[Lease Charges](#)

[Waiting Lists](#)

[Inspection](#)

[URP Distribution](#)

[Roommates](#)

[Attachment](#)

[Memo \(2\)](#)

[Contact](#)

[Email](#)

[EFT Setup](#)

[Credit Card Setup](#)

[Resident History](#)

[Manage Rentable Items](#)

[Make Ready](#)

[New WO](#)

[Billing & Payments Interface](#)

[MPAC Res. Tenant](#)

[MPAC Comm. Tenant](#)

[RTA Charges](#)

[N4 History](#)

The **Functions** section contains links to activities, such as assigning a unit and renewing a lease.

The **Data** section contains links to more specific information about the resident.

# Voyager Interface Basics

## VOYAGER SYSTEM JOB AID

### Family Detail Info Screen

The **Family Detail Info (FDI)** screen contains basic information about income, subsidy amounts, and portability. It also has links to more detailed information, such as family size, which is important when you want to add new family members or update income information.

You access the **Family Detail Info** screen from the **Resident** screen (shown below).

On the **Resident** screen, locate the **Data** section, and click the **Family Detail Info** link.

Resident		Property Info		Functions	
First Name	VANESSA MI <input type="text"/>	Resident ID	t1031666	<a href="#">Deposit Accounting</a>	
Last Name	JACKSON <input type="text"/>	Property	vo_nomtw	<a href="#">Cancel Move Out</a>	
Address	2040 FAIRHAVEN CIR NE UNIT A	Unit	00000003	<a href="#">Assign Unit</a>	
City-St-Zip	ATLANTA GA 30305-4313	Status	Past	<a href="#">Charge</a>	
E-mail	<input type="text"/>	Legal	N/A	<a href="#">Transfer To Property</a>	
Alt. E-mail	<input type="text"/>	Payment Method	Any	<a href="#">Abatement</a>	
Office	<input type="text"/>	Payable Method	EFT	<a href="#">PRH Tenant Hold</a>	
Home	(770) 873-9761			<a href="#">Tenant Payment Agreement</a>	
FAX	<input type="text"/>			<a href="#">Legal</a>	
Mobile	<input type="text"/>			<a href="#">Credit Check</a>	
<input type="button" value="Save"/> <input type="button" value="New"/> <input type="button" value="Help"/>				<b>Data</b>	
				<a href="#">Family Detail Info</a>	
				<a href="#">Lease Charges</a>	
				<a href="#">Waiting Lists</a>	
				<a href="#">Inspection</a>	

# Voyager Interface Basics

## VOYAGER SYSTEM JOB AID

Use the **Family Detail Info** screen to add, review, update, and manage detailed information about the family, record eligibility-compliance information for family members, add family members, generate 50058 submissions, and manage income and asset

The top portion contains information about head of household and buttons to save added information, review and fix errors, add new and review existing 50058s.

Use this menu to clear verifications information and quickly post transactions within 30 days of the paying 50058.

## VOYAGER INTERFACE BASICS

**Family Detail Info**

**Family Info**

Property	vo_nomtw	Tenant	t1031666	Caseworker	<input type="text"/>
Unit	00000003	HoH Name	JACKSON, VAN...	Program (1c.)	VO-Voucher
Owner	v0218567	HoH SSN	256-04-5085	Legal	N/A
Last Action		Current Action	6-End	FSS Caseworker	<input type="text"/>
Last Action ...		Effective Date	08/31/2011		

**Summary**

<a href="#"># Family Members</a>	1	<a href="#"># of Dependents</a>	0	<a href="#">Medical Threshold</a>	0.00
<a href="#">Asset Cash Value</a>	0.00	<a href="#">Asset Income</a>	0.00	<a href="#">Elderly/Disabled Allowance</a>	0.00
<a href="#">Annual Income</a>	11,700.00	<a href="#">Excluded Income</a>	0.00	<a href="#">Dependent Allowance</a>	0.00
<a href="#">Disability Expense</a>	0.00	<a href="#">Excluded Disability</a>	0.00	<a href="#">Estimated TTP</a>	125.00
<a href="#">Medical Expense</a>	0.00	<a href="#">Excluded Medical</a>	0.00	<a href="#">40% of AMI for HCV Max R...</a>	0.00
<a href="#">Child Care Expense</a>	0.00	<a href="#">Excluded Childcare</a>	0.00	<a href="#">Tenant Rent</a>	0.00
FSS Page	Not Attached	<a href="#">FSS Escrow Balance</a>		<a href="#">Housing Assistance Payment</a>	0.00
<a href="#">Family Verifications</a>	1	<a href="#">Outstanding Verifications</a>	1		
<a href="#">Community Service</a>	Not Applicable	<a href="#">Comm Serv Last reviewed</a>	Not Applica...		
<a href="#">Voucher</a>	Attached	<a href="#">EID Status</a>	Not Used		
<a href="#">Portability</a>	Not Used				
<a href="#">Vo/RFTA Tracking</a>					
<a href="#">Work Requirement</a>	In-Progress				

**Functions**

<a href="#">Clear All Verifications</a>
<a href="#">Issue Offer</a>
<a href="#">Update Vo/RFTA Status</a>

**Data**

<a href="#">Attachment</a>
<a href="#">Contact</a>
<a href="#">Memo (2)</a>
<a href="#">Unit PHA Program Info</a>
<a href="#">Inspection</a>
<a href="#">Referral Tracking</a>

**Reports**

<a href="#">Third Party Pymts</a>
<a href="#">Calc Summary</a>
<a href="#">Voucher HAP Contract</a>
<a href="#">Voucher</a>
<a href="#">Lease Amendment</a>
<a href="#">Req. Tenancy Approval</a>
<a href="#">Briefing Packet</a>
<a href="#">Utility Chart</a>
<a href="#">Review Memos</a>
<a href="#">Portability Payment Schedule</a>
<a href="#">Resident Subsidy Schedule</a>

### Screen Tabs

**Summary:** provides links to supporting records and displays calculations.

**General:** has re-exam and unit information.

**Admissions:** has dates and details about families' admission.

**Special Programs:** indicates special programs the family participates in.

**Delinquency:** records details about incidents.

Use this menu to quickly review PHA program information and inspection records for family's selected unit. You can also add memos, contacts, and attachments.

The **Reports** menu contains a variety of reports that you can generate, especially the Resident Subsidy Schedule for the 50058

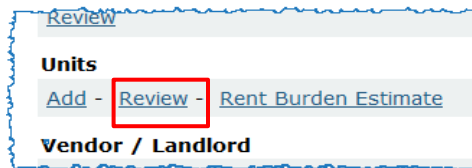
# Interface Basics

## VOYAGER SYSTEM JOB AID

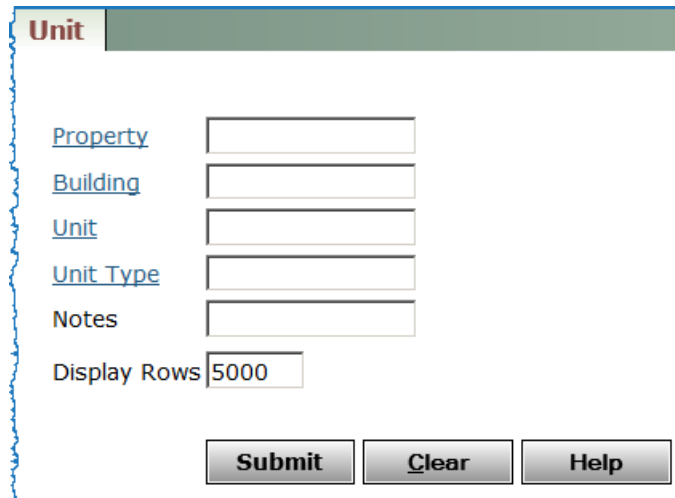
### Unit Screen

Units are the physical spaces that residents occupy. All units are attached to a property. The **Unit** screen provides pertinent information about a unit, including who occupies the unit, the unit's location, the number of bedrooms and baths, and square footage.

To access the **Unit** screen, you must first search for the unit. From the **Home** screen, locate the **Units** Quick Menu, and click **Review**.



The **Unit** search and filters displays.


 A screenshot of the 'Unit' search and filters screen. It features a header 'Unit' and several input fields for search criteria: 'Property', 'Building', 'Unit', 'Unit Type', 'Notes', and 'Display Rows' (set to 5000). At the bottom, there are three buttons: 'Submit', 'Clear', and 'Help'.

Use the search options and filters available on this screen to locate the unit record. If you know any of the information about the unit, type it into the applicable field and then click **Submit**.



# Interface Basics

## VOYAGER SYSTEM JOB AID

The top portion of the **Unit** screen provides specific information about the unit including, type of unit, amount of rent, rental type, address etc. You also have access to buttons that allow you to edit information about the unit and create a new unit. There are also links to popular functions.



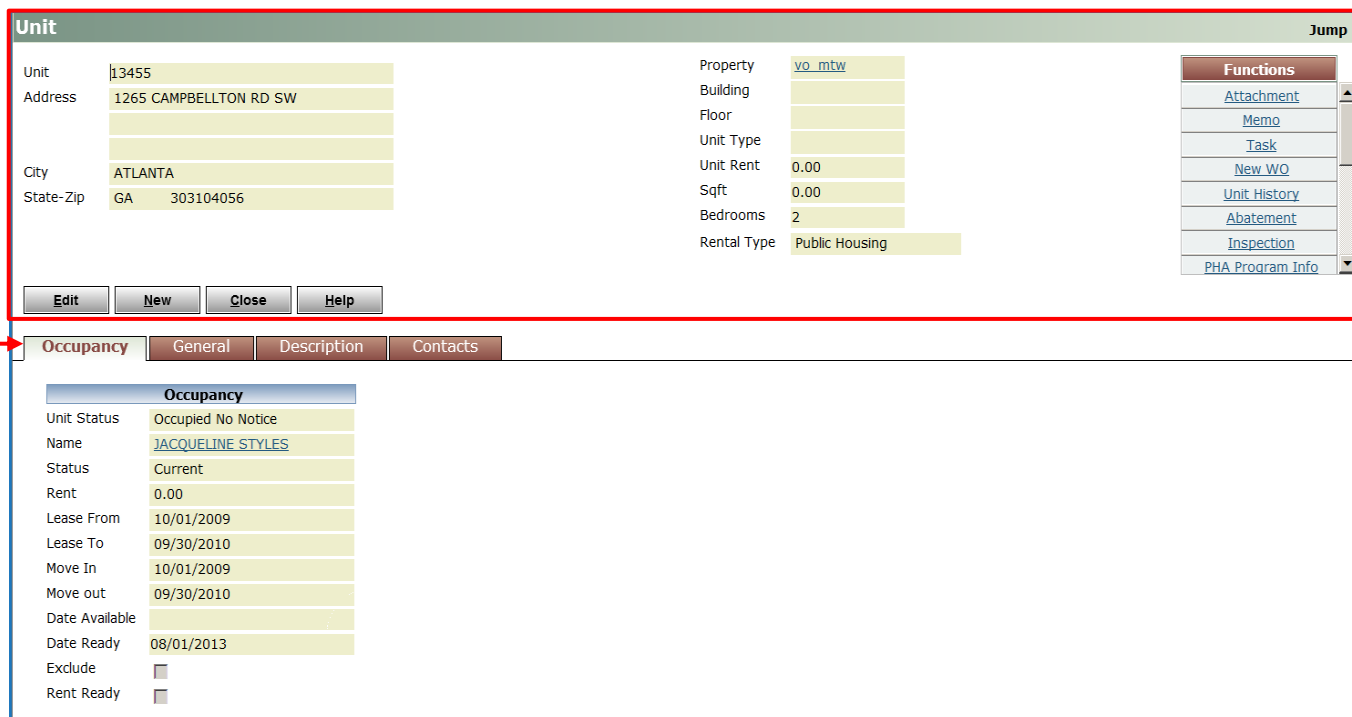
**Screen tabs:**

**Occupancy:** contains information about unit occupants, lease duration, and other dates.

**General:** provides square footage, number of bathrooms, gas or electric, and census information.

**Description:** contains pictures and notes about the unit.

**Contacts:** tells who to contact about the unit.



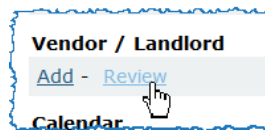
# Interface Basics

## VOYAGER SYSTEM JOB AID

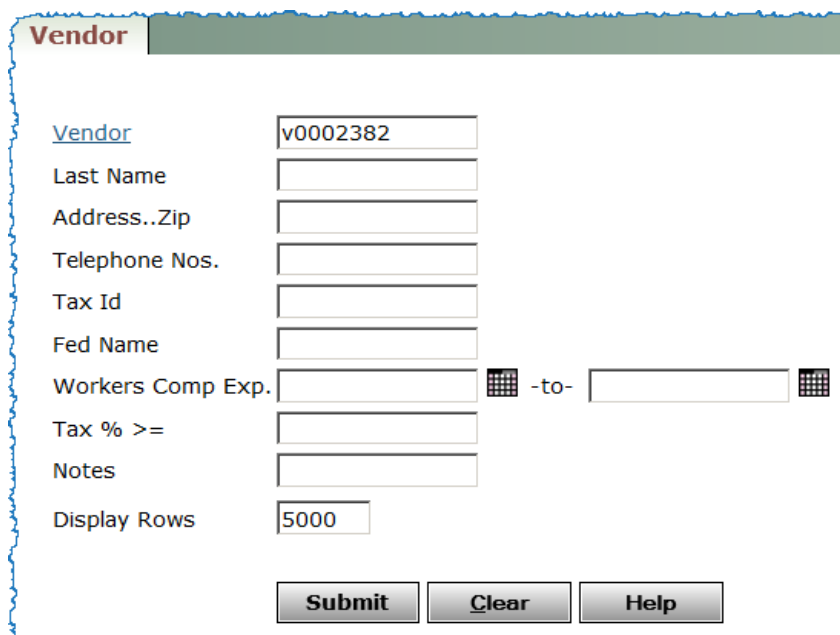
### Vendor Screen

The **Vendor** screen is also called the Landlord screen. This is the main screen for basic information about a vendor, such as a Landlord. You can also use this screen to set up or access Public Housing Authorities (PHA). Voyager assigns every vendor a unique code, which is called the V-code.

To access a **Vendor** screen, you must first search for the vendor's record. From your **Home** page, locate the **Vendor / Landlord** Quick menu, and click **Review**.



The Vendor search and filters display.


 A screenshot of the "Vendor" search and filters display. The form includes the following fields and controls:
 

- Vendor**: Input field containing "v0002382".
- Last Name**: Input field.
- Address..Zip**: Input field.
- Telephone Nos.**: Input field.
- Tax Id**: Input field.
- Fed Name**: Input field.
- Workers Comp Exp.**: Input field followed by a calendar icon, a "-to-" label, another input field, and another calendar icon.
- Tax % >=**: Input field.
- Notes**: Input field.
- Display Rows**: Input field containing "5000".
- Buttons**: "Submit", "Clear", and "Help" buttons.

Use the search options and filters available on this screen to locate the vendor's record. If you know any of the vendor's information, type it in the applicable field and then click **Submit**.

## Interface Basics

### *VOYAGER SYSTEM JOB AID*

The top portion of the **Vendor** screen contains location, contact, and payment information about the vendor. It also contains buttons for editing existing vendor records and creating new vendor records.



## VOYAGER INTERFACE BASICS

**Screen Tabs:**

**General:** provides information about insurance, discounts, etc.

**Other Info:** contains diversity information, such as if the Vendor is minority or women owned.

**Tax Info:** provides the Tax ID and Vendor name as it appears on the W9.

**Vendor**

<table style="width: 100%; border-collapse: collapse;"> <tr><td style="border-bottom: 1px solid #ccc;">Code</td><td style="border-bottom: 1px solid #ccc;">v0000091</td></tr> <tr><td style="border-bottom: 1px solid #ccc;">Company</td><td style="border-bottom: 1px solid #ccc;">AHA Authority Reserve</td></tr> <tr><td style="border-bottom: 1px solid #ccc;">Name</td><td style="border-bottom: 1px solid #ccc;"></td></tr> <tr><td style="border-bottom: 1px solid #ccc;">Dear</td><td style="border-bottom: 1px solid #ccc;"></td></tr> <tr><td style="border-bottom: 1px solid #ccc;">Contact</td><td style="border-bottom: 1px solid #ccc;"></td></tr> <tr><td style="border-bottom: 1px solid #ccc;">Address</td><td style="border-bottom: 1px solid #ccc;">Perry Homes Phase IV Escrow 230 John Wesley Dobbs Avenue NE 5th Floor - Finance</td></tr> <tr><td style="border-bottom: 1px solid #ccc;">City</td><td style="border-bottom: 1px solid #ccc;">Atlanta</td></tr> <tr><td style="border-bottom: 1px solid #ccc;">State-Zip</td><td style="border-bottom: 1px solid #ccc;">GA 30303-2429</td></tr> <tr><td style="border-bottom: 1px solid #ccc;">E-Mail</td><td style="border-bottom: 1px solid #ccc;"></td></tr> <tr><td style="border-bottom: 1px solid #ccc;">Alt</td><td style="border-bottom: 1px solid #ccc;"></td></tr> </table>	Code	v0000091	Company	AHA Authority Reserve	Name		Dear		Contact		Address	Perry Homes Phase IV Escrow 230 John Wesley Dobbs Avenue NE 5th Floor - Finance	City	Atlanta	State-Zip	GA 30303-2429	E-Mail		Alt		<table style="width: 100%; border-collapse: collapse;"> <tr><th colspan="2" style="background-color: #e0e0e0;">Telephone</th></tr> <tr><td>Office</td><td style="border-bottom: 1px solid #ccc;">(404) 817-7431</td></tr> <tr><td>Home</td><td style="border-bottom: 1px solid #ccc;"></td></tr> <tr><td>FAX</td><td style="border-bottom: 1px solid #ccc;"></td></tr> <tr><td>Mobile</td><td style="border-bottom: 1px solid #ccc;"></td></tr> <tr><th colspan="2" style="background-color: #e0e0e0;">Checks</th></tr> <tr><td>Payment Method</td><td style="border-bottom: 1px solid #ccc;">Check</td></tr> <tr><td>Consolidate</td><td><input checked="" type="checkbox"/></td></tr> <tr><td>Check Memo From Inv</td><td><input type="checkbox"/></td></tr> <tr><td>Hold Payments</td><td><input type="checkbox"/></td></tr> <tr><td>PO Required</td><td><input type="checkbox"/></td></tr> <tr><td>No Signature</td><td><input type="checkbox"/></td></tr> <tr><td>On Checks Over</td><td style="border-bottom: 1px solid #ccc;">0.00</td></tr> <tr><td>Memo</td><td style="border-bottom: 1px solid #ccc;"></td></tr> </table>	Telephone		Office	(404) 817-7431	Home		FAX		Mobile		Checks		Payment Method	Check	Consolidate	<input checked="" type="checkbox"/>	Check Memo From Inv	<input type="checkbox"/>	Hold Payments	<input type="checkbox"/>	PO Required	<input type="checkbox"/>	No Signature	<input type="checkbox"/>	On Checks Over	0.00	Memo		<table style="width: 100%; border-collapse: collapse;"> <tr><th style="background-color: #e0e0e0;">Data</th></tr> <tr><td style="border-bottom: 1px solid #ccc;"><a href="#">Attachment</a></td></tr> <tr><td style="border-bottom: 1px solid #ccc;"><a href="#">Memo</a></td></tr> <tr><td style="border-bottom: 1px solid #ccc;"><a href="#">Contact</a></td></tr> <tr><td style="border-bottom: 1px solid #ccc;"><a href="#">Email</a></td></tr> <tr><td style="border-bottom: 1px solid #ccc;"><a href="#">EFT Setup</a></td></tr> <tr><td style="border-bottom: 1px solid #ccc;"><a href="#">Ledger</a></td></tr> <tr><td style="border-bottom: 1px solid #ccc;"><a href="#">Commodity Codes</a></td></tr> <tr><td style="border-bottom: 1px solid #ccc;"><a href="#">Vendor Eligibility</a></td></tr> <tr><td style="border-bottom: 1px solid #ccc;"><a href="#">Landlord Foreclosure</a></td></tr> <tr><td style="border-bottom: 1px solid #ccc;"><a href="#">Landlord Date Entered</a></td></tr> <tr><td style="border-bottom: 1px solid #ccc;"><a href="#">Vendor Service Provider</a></td></tr> <tr><td style="border-bottom: 1px solid #ccc;"><a href="#">Abatement</a></td></tr> <tr><td style="border-bottom: 1px solid #ccc;"><a href="#">Prop List</a></td></tr> </table>	Data	<a href="#">Attachment</a>	<a href="#">Memo</a>	<a href="#">Contact</a>	<a href="#">Email</a>	<a href="#">EFT Setup</a>	<a href="#">Ledger</a>	<a href="#">Commodity Codes</a>	<a href="#">Vendor Eligibility</a>	<a href="#">Landlord Foreclosure</a>	<a href="#">Landlord Date Entered</a>	<a href="#">Vendor Service Provider</a>	<a href="#">Abatement</a>	<a href="#">Prop List</a>
Code	v0000091																																																															
Company	AHA Authority Reserve																																																															
Name																																																																
Dear																																																																
Contact																																																																
Address	Perry Homes Phase IV Escrow 230 John Wesley Dobbs Avenue NE 5th Floor - Finance																																																															
City	Atlanta																																																															
State-Zip	GA 30303-2429																																																															
E-Mail																																																																
Alt																																																																
Telephone																																																																
Office	(404) 817-7431																																																															
Home																																																																
FAX																																																																
Mobile																																																																
Checks																																																																
Payment Method	Check																																																															
Consolidate	<input checked="" type="checkbox"/>																																																															
Check Memo From Inv	<input type="checkbox"/>																																																															
Hold Payments	<input type="checkbox"/>																																																															
PO Required	<input type="checkbox"/>																																																															
No Signature	<input type="checkbox"/>																																																															
On Checks Over	0.00																																																															
Memo																																																																
Data																																																																
<a href="#">Attachment</a>																																																																
<a href="#">Memo</a>																																																																
<a href="#">Contact</a>																																																																
<a href="#">Email</a>																																																																
<a href="#">EFT Setup</a>																																																																
<a href="#">Ledger</a>																																																																
<a href="#">Commodity Codes</a>																																																																
<a href="#">Vendor Eligibility</a>																																																																
<a href="#">Landlord Foreclosure</a>																																																																
<a href="#">Landlord Date Entered</a>																																																																
<a href="#">Vendor Service Provider</a>																																																																
<a href="#">Abatement</a>																																																																
<a href="#">Prop List</a>																																																																

<b>General</b>	<b>Other Info</b>	<b>Tax Info</b>	
----------------	-------------------	-----------------	--

<table style="width: 100%; border-collapse: collapse;"> <tr><td>Inactive</td><td><input type="checkbox"/></td></tr> <tr><td>Employee</td><td><input type="checkbox"/></td></tr> <tr><td>Language</td><td style="border-bottom: 1px solid #ccc;"></td></tr> <tr><td>Usual Account</td><td style="border-bottom: 1px solid #ccc;"></td></tr> </table>	Inactive	<input type="checkbox"/>	Employee	<input type="checkbox"/>	Language		Usual Account		<table style="width: 100%; border-collapse: collapse;"> <tr><td>URL</td><td style="border-bottom: 1px solid #ccc;"></td></tr> <tr><td>Notes</td><td style="border-bottom: 1px solid #ccc;"></td></tr> </table>	URL		Notes		<table style="width: 100%; border-collapse: collapse;"> <tr><th style="background-color: #e0e0e0;">Discount</th></tr> <tr><td>Percent</td><td style="border-bottom: 1px solid #ccc;"></td></tr> <tr><td>Day</td><td style="border-bottom: 1px solid #ccc;">30</td></tr> <tr><td>Days from Invoice</td><td><input checked="" type="radio"/></td></tr> <tr><td>Day of the Month</td><td><input type="radio"/></td></tr> <tr><td>Payment Terms</td><td style="border-bottom: 1px solid #ccc;">30</td></tr> <tr><th style="background-color: #e0e0e0;">Insurance Expiration</th></tr> <tr><td>Liability</td><td style="border-bottom: 1px solid #ccc;"></td></tr> <tr><td>Workers Comp</td><td style="border-bottom: 1px solid #ccc;"></td></tr> </table>	Discount	Percent		Day	30	Days from Invoice	<input checked="" type="radio"/>	Day of the Month	<input type="radio"/>	Payment Terms	30	Insurance Expiration	Liability		Workers Comp	
Inactive	<input type="checkbox"/>																													
Employee	<input type="checkbox"/>																													
Language																														
Usual Account																														
URL																														
Notes																														
Discount																														
Percent																														
Day	30																													
Days from Invoice	<input checked="" type="radio"/>																													
Day of the Month	<input type="radio"/>																													
Payment Terms	30																													
Insurance Expiration																														
Liability																														
Workers Comp																														

Edit	New	Close	Help
------	-----	-------	------

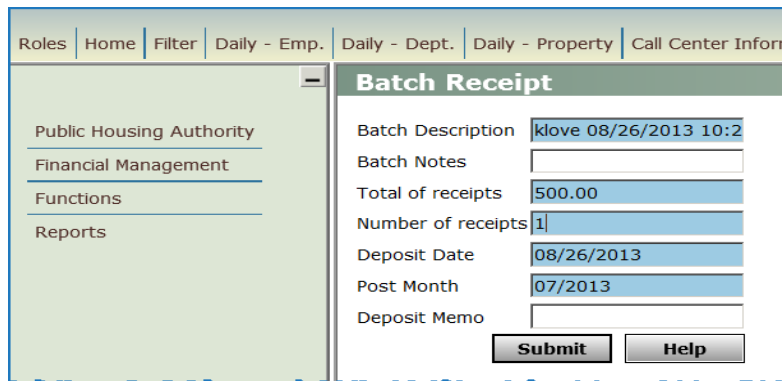
The **Data** section contains links to more specific information about the Vendor/Landlord. It also contains links for communicating with the Vendor.

# Interface Basics

## VOYAGER SYSTEM JOB AID

### Required Fields

Shaded fields (highlighted in blue) are required fields. Voyager does not allow you to advance to the next screen if you leave any of the required fields empty. If you forget to complete a required field, the system displays a warning, and you cannot save or submit the data.



In this example the **Batch Description**, **Total of receipts**, **Number of receipts**, **Deposit Date**, and **Post Month** fields are all required fields.

## VOYAGER INTERFACE BASICS

### Searching with Filters

There are two ways to find information in Voyager:

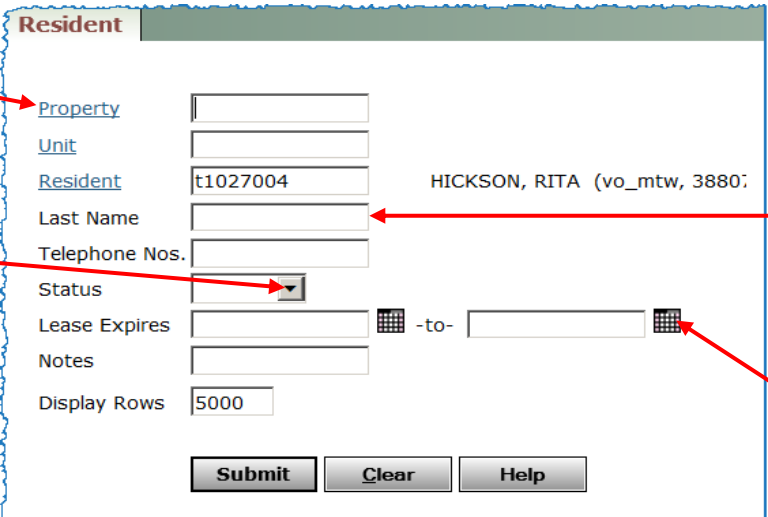
- Search Filters
- Links

Filters are useful in helping to quickly find existing data screens, open existing records, or print records. Most of the links on the Voyager **Home** screen open to display a search filter screen. You can easily identify a search filter screen because they contain links, drop-down lists, and calendar buttons that you can use to filter the information you want to find. All search filter screens in Voyager work the same way. There are several ways to use a filter to locate the record you want to work with:

- Search by specific record
- Type information into filter fields
- Click field/label links
- Use the wild card character (%)
- Perform a person search

### Search by a Specific Record

You can perform a search by entering criteria to find a specific record. If you know exactly what you are searching for, enter the search criteria in the appropriate field.



The screenshot shows the 'Resident' search interface. On the left, there are links for 'Property', 'Unit', and 'Resident'. The 'Resident' link is selected, and the search criteria are: 't1027004' in the 'Resident' field, 'HICKSON, RITA (vo\_mtw, 3880:' in the 'Last Name' field, and '5000' in the 'Display Rows' field. There are also fields for 'Telephone Nos.', 'Status', 'Lease Expires', and 'Notes'. A date range selector is visible between 'Lease Expires' and 'Notes'. At the bottom, there are 'Submit', 'Clear', and 'Help' buttons.

Annotations with red arrows point to specific elements:

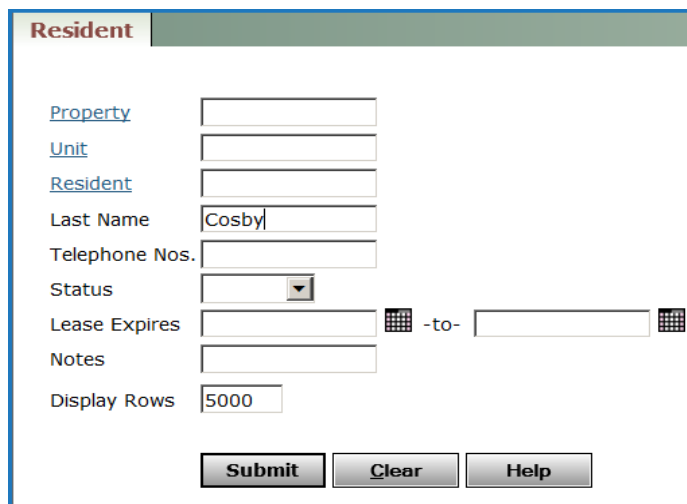
- Click the link and a search window displays. (Points to the 'Resident' link)
- The drop-down list contains filter options for searching. (Points to the 'Status' field)
- Type a last name, into Last name field and the system returns a list of everyone in the system with that last name. (Points to the 'Last Name' field)
- Click the calendar icons to search for a specific period of time. (Points to the calendar icons in the date range selector)

## VOYAGER INTERFACE BASICS

Populating multiple fields filters the results to a smaller, more manageable list. After defining the search terms, click **Submit** to see the results.

### Search by Typing Information into the Field

If you already have information about the resident, vendor, etc you want to search for, you can type the pertinent information into the appropriate field. In this example, we search for a resident with the last name "Cosby". Type Cosby into the **Last Name** field, and click **Submit**.



The screenshot shows a search form titled "Resident" with the following fields and controls:

- Property:
- Unit:
- Resident:
- Last Name:
- Telephone Nos.:
- Status:
- Lease Expires:  -to-
- Notes:
- Display Rows:

At the bottom of the form are three buttons: **Submit**, **Clear**, and **Help**.

All residents with the last name Cosby display in the search results listing on the left side. The record of the first person on the list displays in the center of the screen.



## VOYAGER INTERFACE BASICS

**Resident**

- 00001359 (P) - COSBY, LOU
- 00001445 (P) - COSBY, KEN
- 20186 (C) - COSBY, APRIL
- 5390 (C) - COSBY, ALICIA
- AR (C) - Cosby Spear A, Sprl
- AR (C) - Cosby Spear A, T-M
- AR (C) - Cosby Spear A, Veri
- AR (C) - Cosby Spear B, AT&

**Resident**

First Name: LOUGENE MI

Last Name: COSBY

Address: 650 ABBERLEY WAY  
APT 1

City-St-Zip: STONE MOUNTAIN GA 30083-6356

E-mail: \_\_\_\_\_

Alt. E-mail: \_\_\_\_\_

Office: \_\_\_\_\_

Home: (404) 753-9360

FAX: \_\_\_\_\_

Mobile: \_\_\_\_\_

**Property Info**

Resident ID: t1012569

Property: vo\_mtw

Unit: 00001359

Status: Past

Legal: N/A

Payment Method: Any

Payable Method: Check

**Functions**

- [Deposit Accounting](#)
- [Cancel Move Out](#)
- [Assign Unit](#)
- [Charge](#)
- [Transfer To Property](#)
- [Abatement](#)
- [PRH Tenant Hold](#)
- [Tenant Payment Agreement](#)
- [Legal](#)
- [Credit Check](#)

**Data**

- [Family Detail Info](#)
- [Lease Charges](#)
- [Waiting Lists](#)
- [Inspection](#)
- [URP Distribution](#)
- [Roommates](#)
- [Attachment](#)
- [Memo \(3\)](#)
- [Contact](#)
- [Email](#)
- [FFT Setup](#)
- [Credit Card Setup](#)
- [Resident History](#)
- [Manage Rentable Items](#)
- [Make Ready](#)
- [New WO](#)
- [Billing & Payments Interface](#)
- [MPAC Res. Tenant](#)
- [MPAC Comm. Tenant](#)
- [RTA Charges](#)
- [N4 History](#)

**Lease Info** | **Deposit Info** | **Lease Charges** | **Other Info**

Lease Information				Late Fee			
Mkt. Rent	0.00	Rent	0.00	Base %	0.00	% Owed-total	
Due Day	1	Other Charges	0.00	Grace Period	6		
Move In	09/04/2003	Total Charges	0.00	2nd %	0.00	% Owed-total	
Lease Sign		Notice	09/01/2012	2nd Grace	0		
Lease From	10/01/2012	Move Out	10/01/2012	Max %	0.00	% Owed-total	
Lease To	08/31/2013	Lease Desc		\$/day	0.00		
Last Renewal		Responsibility Date		Max # Days	0		
				Minimum Due	0.00		

Subsidized

### Search by Clicking the Field Label Links and Using the Filter Window

Another way to search using the filters is to click the field label links. Clicking on a field label link opens a lookup list that displays codes you can use to complete the field. Sometimes it might be necessary to search for the value of a field because the field uses a code that is not easily known or memorized. For example, if we need to find a T-code for a resident, we can click the **Resident** link. Links makes it easier to find codes that are not easily known or memorized.



# VOYAGER INTERFACE BASICS

The screenshot shows the Voyager interface with a search form on the left and a filter window on the right. A red arrow points from the text "Click the link." to the "Property" field in the search form. Another red arrow points from the text "A filter window displays." to the filter window.

**Click the link.**

**A filter window displays.**

**Property**

**Unit**

**Resident**

Last Name

Telephone Nos.

Status

Lease Expires  -to-

Notes

Display Rows 5000

**Code** **Description**

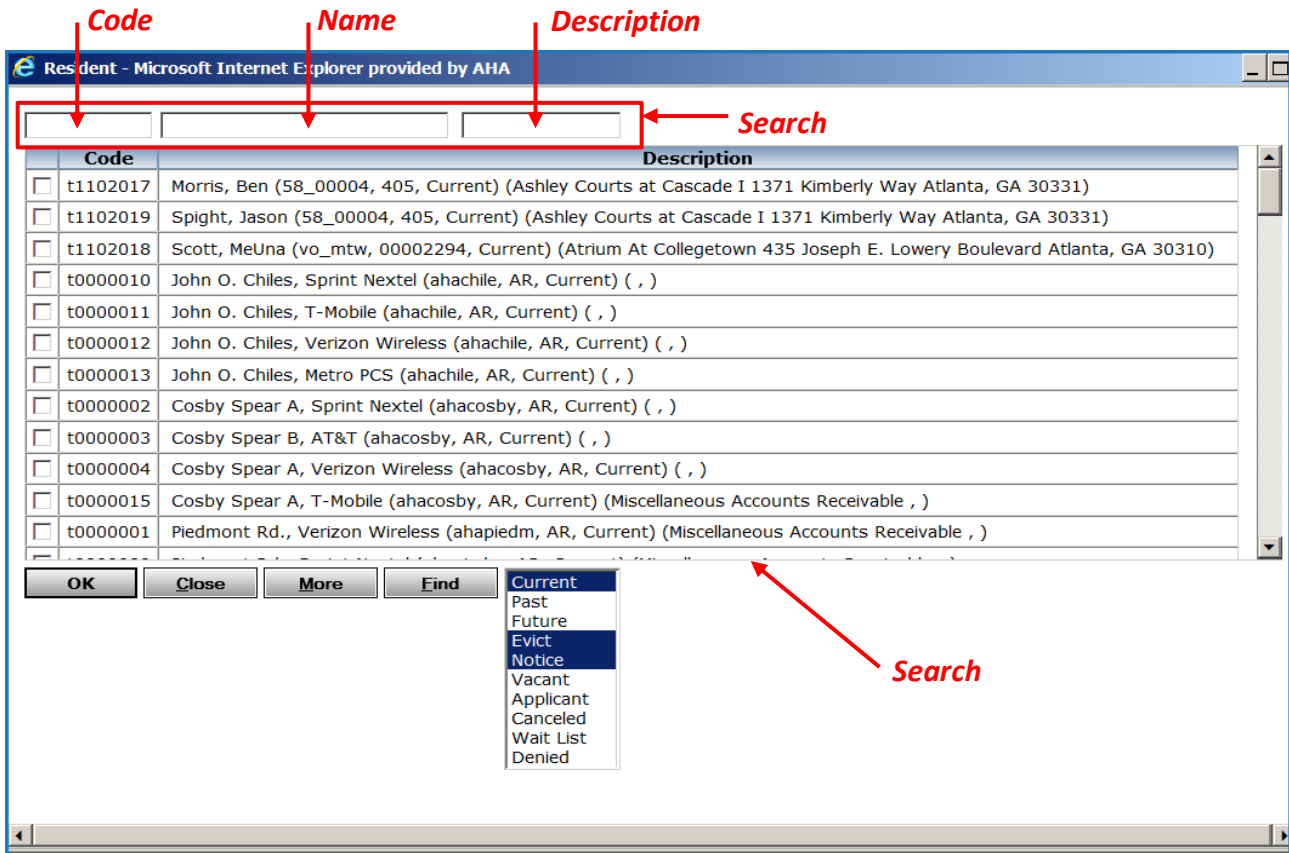
<input type="checkbox"/>	t0000010	John O. Chiles, Sprint Nextel (ahachile, AR, Current) ( , )
<input type="checkbox"/>	t0000011	John O. Chiles, T-Mobile (ahachile, AR, Current) ( , )
<input type="checkbox"/>	t0000012	John O. Chiles, Verizon Wireless (ahachile, AR, Current) ( , )
<input type="checkbox"/>	t0000013	John O. Chiles, Metro PCS (ahachile, AR, Current) ( , )
<input type="checkbox"/>	t0000002	Cosby Spear A, Sprint Nextel (ahacosby, AR, Current) ( , )
<input type="checkbox"/>	t0000003	Cosby Spear B, AT&T (ahacosby, AR, Current) ( , )
<input type="checkbox"/>	t0000004	Cosby Spear A, Verizon Wireless (ahacosby, AR, Current) ( , )
<input type="checkbox"/>	t0000015	Cosby Spear A, T-Mobile (ahacosby, AR, Current) (Miscellaneous Accounts Receivable , )
<input type="checkbox"/>	t0000001	Piedmont Rd., Verizon Wireless (ahapiedm, AR, Current) (Miscellaneous Accounts Receivable , )
<input type="checkbox"/>	t0000009	Piedmont Rd., Sprint Nextel (ahapiedm, AR, Current) (Miscellaneous Accounts Receivable , )
<input type="checkbox"/>	t0000016	Piedmont Rd., AT&T (ahapiedm, AR, Current) (Miscellaneous Accounts Receivable , )
<input type="checkbox"/>	t0001585	Hall, Kimberly (mtw_hcv, DPA_037, Current) ( Atlanta, GA )

- Current
- Past
- Future
- Evict
- Notice
- Vacant
- Applicant
- Cancelled
- Wait List
- Denied

## VOYAGER INTERFACE BASICS

### The Filter Window

The filter window appears anytime you click a field label link. In our example, the Resident filter window has three blank find fields. Depending on the filter window, you might see one, two, or three search fields you can use to quickly find information.



These fields allow you to narrow the search results to a smaller list:

---

**CODE**

Type the code for the person, company, or agency for which you are searching. (Example: t0005428, v0000137)

---

**NAME**

Type all or any part of the name of the person, company, or agency you want to search.  
(Example: "Smith", John Smith", "Housing Authority", "DeKalb")

---

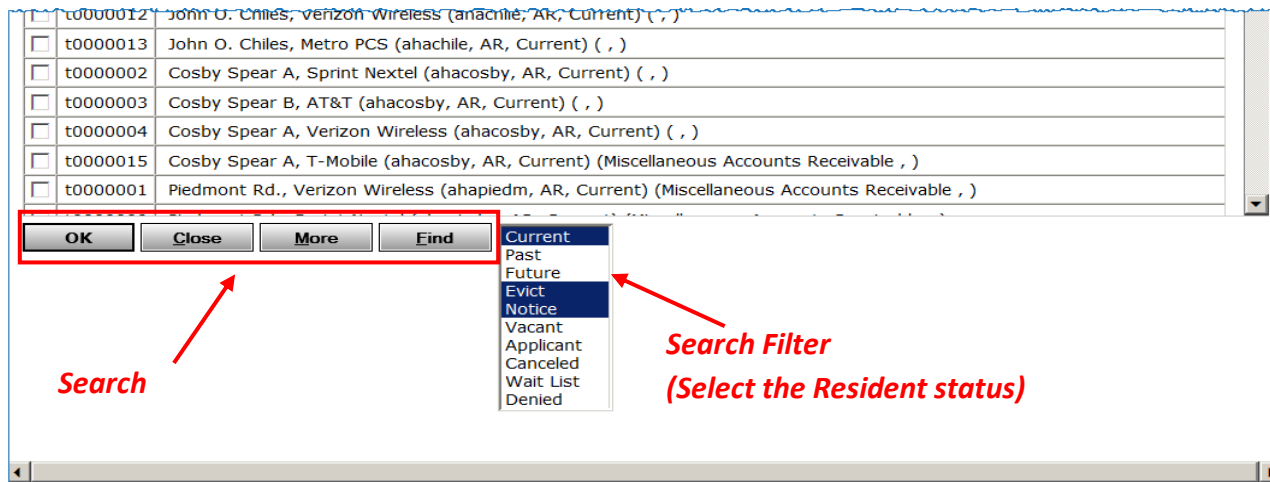
## VOYAGER INTERFACE BASICS

**DESCRIPTION** Type all or part of the address for the entity you are searching for.  
(Example: “Main St.”, “30328”, “Roswell”)

**STATUS** This option displays on the Resident filter window. Select the status of the entity you are searching for.

For each option, there is a checkbox. Only one option can be selected at a time.

The bottom of the filter pop-up window has buttons--**Ok**, **Close**, **More**, and **Find**.



**OK** After you select an option from the list, click **OK** to close the filter window and populate the result in the search screen.

**CLOSE** Exits the filter window without making an identified selection.

**MORE** Shows additional results that are currently not displayed.

**FIND** Narrows the result list.



**IMPORTANT:** After you populate one of the search fields at the top of the filter window, click **Find** to receive a list of results. **DO NOT PRESS ENTER ON YOUR KEYBOARD.** Pressing **Enter** closes the filter window without displaying the results or saving your selection.

## VOYAGER INTERFACE BASICS

**NOTE:** Some filter pop-up windows have **Check All** and **Clear All** links at the top of the screen, which means that you can select multiple items. This example does not.

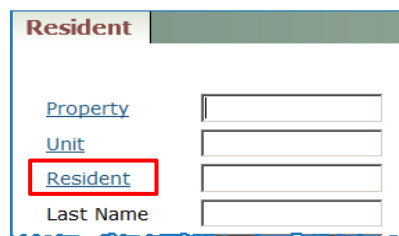
### Search Using the Wildcard Character (%)

Another way you can quickly locate information is to use the wildcard character. The wildcard character in Voyager is the percent sign (%). If you do not know how to spell a name, street, company, or agency, use a wildcard character to quickly locate the correct information.

In this example, we search for a resident using the wildcard character.

#### To search using the wildcard character (%):

1. Navigate to the **Resident** screen, and click the **Resident** link.

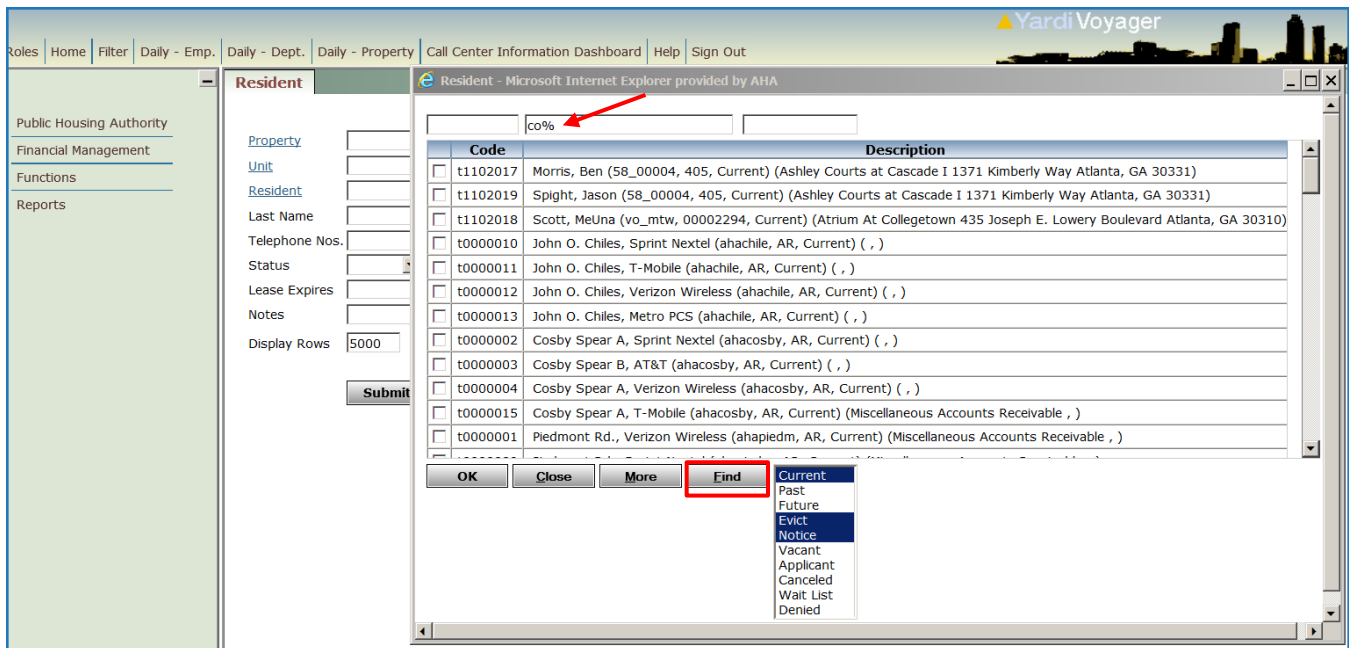


The screenshot shows a search filter interface for the 'Resident' screen. It features a title bar with the word 'Resident' in a green box. Below the title bar, there are four search criteria listed on the left, each with a corresponding text input field on the right: 'Property', 'Unit', 'Resident', and 'Last Name'. The 'Resident' link is highlighted with a red rectangular box.

The Resident search filter screen displays.

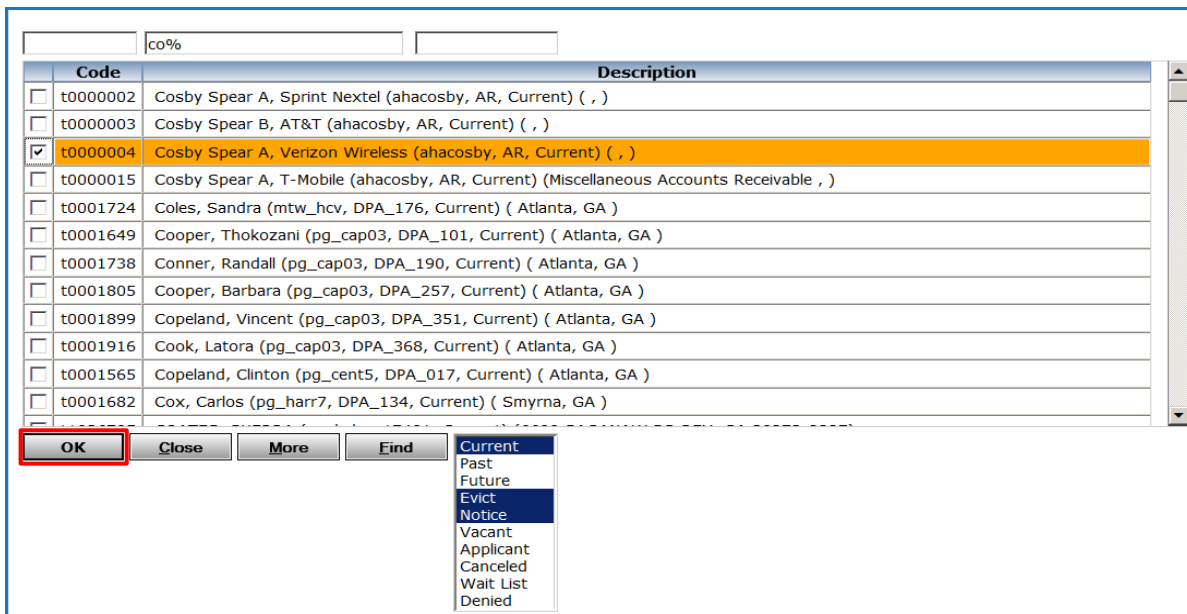
2. Type co% in the **Name** find field, and click **Find**.

## VOYAGER INTERFACE BASICS



All names that begin with the letters co in the description display in the results.

- Locate the correct record, click the check box next to that record, and click **OK**.



## VOYAGER INTERFACE BASICS

- The system returns you to the initial screen, which in our example is the **Resident** screen, and populates the **Resident** field with the resident’s T-code.

### Search by Person

If you work with participants or applicants, it is critical that you have the correct record for each individual. You can use the **Person Search** to see if a person is a current or past participant. There can also be more than one person with the same name and to ensure you are working with the correct record, the **Person Search** results show all matching records. You can select the correct record using the last four digits of the social security number.

To perform a search by person:

- From your **Home** page, locate the **Reports** Quick link section.
- Under the **Name/SSN Search** section, click the **Person Search** link.

## VOYAGER INTERFACE BASICS

The **Person Search** screen displays.

**Person Search**

Search for First Name 1

Search for Last Name 1

Search for SSN 1

Search for First Name 2

Search for Last Name 2

Search for SSN 2

Sort Order

Mask SSN

Destination

3. Populate any of the fields on this screen to search for a person. The most direct search is to populate the **Search for SSN1** field because everyone has a unique social security number.

## Generating Reports

Virtually every role in Voyager has some type of report that must be run. Inspectors run reports to find their inspection assignments, and Financial Analyst run reports for Housing Assistance Payments (HAP) to be reviewed and approved. There are three ways to run reports in Voyager:

- Home screen > Reports menu
- Side menu > Reports menu
- Report link on specific screens

### Run Reports from the Home Screen

One way to access reports is from your **Home** screen. There is an entire section of reports, organized by subject on your **Home** page. Remember that your role and responsibilities determine the types of reports that are available to you.

## VOYAGER INTERFACE BASICS

Customer Services Group Main Menu		Database=***UAT_Conversion Db***
<p><b>Case Management</b></p> <p><b>Applicant</b>  <a href="#">Add</a> - <a href="#">Review</a> - <a href="#">Recap</a> - <a href="#">Rent Burden Estimate</a>  <a href="#">Approve</a> - <a href="#">Deny</a> - <a href="#">Cancel</a></p> <p><b>Resident</b>  <a href="#">Add</a> - <a href="#">Review</a> - <a href="#">Recap</a> - <a href="#">Rent Burden Estimate</a></p> <p><b>Inspections</b>  <a href="#">Add</a> - <a href="#">Review</a> - <a href="#">Assignment</a></p> <p><b>50058</b>  <a href="#">Review</a></p> <p><b>Units</b>  <a href="#">Add</a> - <a href="#">Review</a> - <a href="#">Rent Burden Estimate</a></p> <p><b>Vendor / Landlord</b>  <a href="#">Add</a> - <a href="#">Review</a></p> <p><b>Calendar</b>  <a href="#">My Calendar</a> - <a href="#">General</a></p> <p><b>Schedule Appointments</b>  <a href="#">Today</a> - <a href="#">This Week</a> - <a href="#">Choose Date</a></p> <p><b>Daily Activity - Employee</b>  <a href="#">Today</a> - <a href="#">Choose Date</a></p> <p><b>Daily Activity - Department</b>  <a href="#">Today</a> - <a href="#">Choose Date</a></p>	<p><b>Agency Management</b></p> <p><b>Waiting List</b>  <a href="#">Add</a> - <a href="#">Review</a>  <a href="#">Generation</a> - <a href="#">Selection</a></p> <p><b>Correspondents</b>  <a href="#">Add</a> - <a href="#">Review</a></p> <p><b>PHA 50058 Links</b>  <a href="#">PIC Home Page</a>  <a href="#">Logon to PIC</a>  <a href="#">50058 User Forums</a>  <a href="#">50058 Instructions</a></p> <p><b>PHA Resource Links</b>  <a href="#">Public &amp; Indian Housing (PIH)</a>  <a href="#">PIH Notices</a>  <a href="#">Code of Federal Regs. (CFR)</a>  <a href="#">HUDCLIPS</a>  <a href="#">REAC</a></p> <p><b>Agency Links</b>  <a href="#">Agency Home Page</a>  <a href="#">Agency Defined Link(s)</a>  <a href="#">Yardi Client Central</a>  <a href="#">Criminal Background Screening</a>  <a href="#">Inspection Photo</a>  <a href="#">Address Validation/Add Unit</a></p> <p><b>Centralized Links</b></p>	<p><b>Reports</b></p> <p><b>Custom Reports</b>  <a href="#">Custom Reports</a></p> <p><b>Name/SSN Search</b>  <a href="#">Person Search</a></p> <p><b>Management</b>  <a href="#">Caseworker Listing</a>  <a href="#">Recertifications</a>  <a href="#">Recertification Exceptions</a>  <a href="#">Incomplete Reviews</a>  <a href="#">50058 Listing</a>  <a href="#">Tenant Directory</a>  <a href="#">Household Member Directory</a>  <a href="#">Landlord Review</a>  <a href="#">Voucher Trend Analysis</a>  <a href="#">Voucher Monthly Analysis</a>  <a href="#">SEMAP</a></p> <p><b>Availability</b>  <a href="#">Vacancy</a>  <a href="#">Unit Status</a>  <a href="#">Lease Expiration</a></p> <p><b>Tenant</b>  <a href="#">50058 Report - Full</a>  <a href="#">50058 Report - Condensed</a>  <a href="#">Family Review</a></p>

When you click one of the links under the **Reports** section, a search screen might display. (See the Searching with Filters section on page 22 for instructions about searching and filtering.) Use the search screens to determine the parameters that display on your report. You can specify dates, action types, tenants, property, and so on. After you complete the necessary fields on the search screen, click **Submit**, and your report generates.



## VOYAGER INTERFACE BASICS

### Run Reports from Individual Screens

Another way you can access a report is to click the report's link from within a screen. Some screens in Voyager, such as the Resident's or the **Family Detail Info** screen, have links that open reports. Most information detail screens have three sections on the right side of the screen: Functions, Data or Other Data, and Reports.

For example, when working in a resident's **Family Detail Info** screen, you can quickly access specific reports, such as the **Resident Subsidy Schedule** report.

**Family Detail Info**

**Family Info**

Property: [vo\\_mtw](#) Tenant: [t1027004](#) Caseworker:

Unit: [38807](#) HoH Name: HICKSON, RITA A Program (1c.): VO-Voucher

Owner: [v0204209](#) HoH SSN: 253-08-4375 Legal: **Violation Pending**

Last Action: 2-Annual Current Action: 3-Interim FSS Caseworker:

Last Action ...: 02/01/2013 Effective Date: 06/01/2013

Buttons: Save Alerts (0/0/0) Help Add 58 Review 58 (2) Manage 58s

Summary	General	Admission	Special Programs	Delinquency	
<a href="#"># Family Members</a>	7	<a href="#"># of Dependents</a>	4	<a href="#">Medical Threshold</a>	0.00
<a href="#">Asset Cash Value</a>	0.00	<a href="#">Asset Income</a>	0.00	<a href="#">Elderly/Disabled Allowance</a>	0.00
<a href="#">Annual Income</a>	52,048.00	<a href="#">Excluded Income</a>	0.00	<a href="#">Dependent Allowance</a>	3,000.00
<a href="#">Disability Expense</a>	0.00	<a href="#">Excluded Disability</a>	0.00	<a href="#">Estimated TTP</a>	1,226.00
<a href="#">Medical Expense</a>	0.00	<a href="#">Excluded Medical</a>	0.00	<a href="#">40% of AMI for HCV Max R...</a>	1,635.00
<a href="#">Child Care Expense</a>	0.00	<a href="#">Excluded Childcare</a>	0.00	<a href="#">Tenant Rent</a>	1,226.00
<a href="#">FSS Page</a>		<a href="#">FSS Escrow Balance</a>		<a href="#">Housing Assistance Payment</a>	34.00
<a href="#">Family Verifications</a>	4	<a href="#">Outstanding Verifications</a>	0		
<a href="#">Community Service</a>	Not Applicable	<a href="#">Comm Serv Last reviewed</a>	Not Applica...		
<a href="#">Voucher</a>	Attached	<a href="#">EID Status</a>	Not Used		
<a href="#">Portability</a>	Not Used				
<a href="#">Vo/RFTA Tracking</a>					
<a href="#">Work Requirement</a>					

**Functions**

- [Clear All Verifications](#)
- [Issue Offer](#)
- [Update Vo/RFTA Status](#)

**Data**

- [Attachment](#)
- [Contact](#)
- [Memo \(5\)](#)
- [Unit PHA Program Info](#)
- [Inspection](#)
- [Rent Hardship](#)
- [Referral Tracking](#)

**Reports**

- [Third Party Pymts](#)
- [Calc Summary](#)
- [Voucher HAP Contract](#)
- [Voucher](#)
- [Lease Amendment](#)
- [Req. Tenancy Approval](#)
- [Briefing Packet](#)
- [Utility Chart](#)
- [Review Memos](#)
- [Portability Payment Schedule](#)
- [Resident Subsidy Schedule](#)

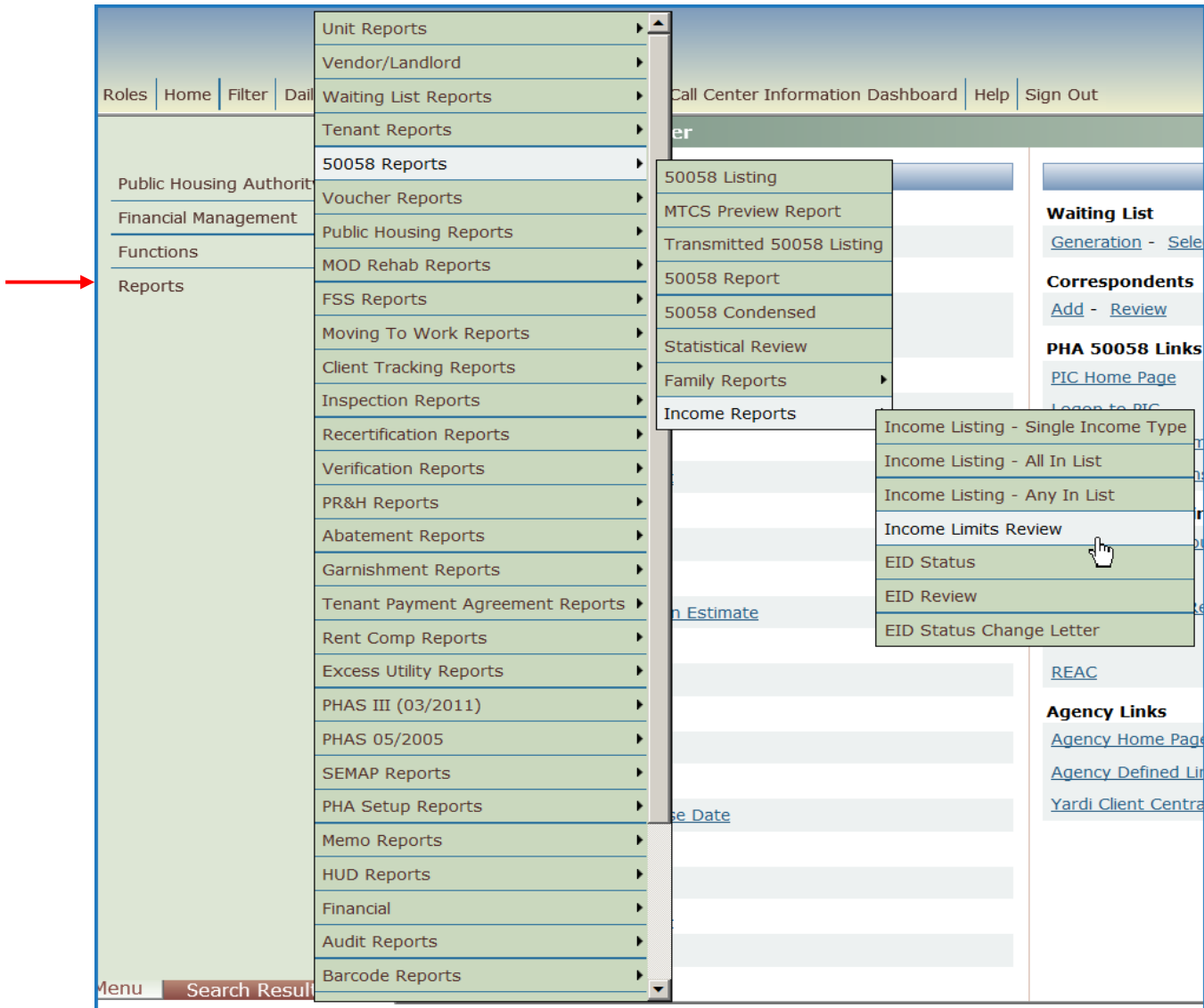
When you click the desired report, if a search filter screen displays (See the Searching with Filters section on page 22 for instructions about searching and filtering.), use the search filter screens to determine the parameters that display on your report. You can specify dates, action types, tenants, property, and so on. After you complete the necessary fields on the search screen, click **Submit**, and your report generates.

## VOYAGER INTERFACE BASICS

## VOYAGER INTERFACE BASICS

### Run Reports from the Side menu

The **Side** menu has a **Reports** menu option for accessing Voyager reports. Your role determines the reports that you can access using the Side menu. The following **Reports** menu is for the Housing Authority Manager role.



From the **Side** menu, click **Reports**, and navigate to the desired report. If a search filter screen displays (See the Searching with Filters section on page 22 for instructions about searching and filtering.), use the search filter screen to determine the range of information that display on your report. You can

## VOYAGER INTERFACE BASICS

specify dates, action types, tenants, property, and so on. After you complete the necessary fields on the search filter screen, click **Submit**, and your report generates.

### Export a Report to Excel

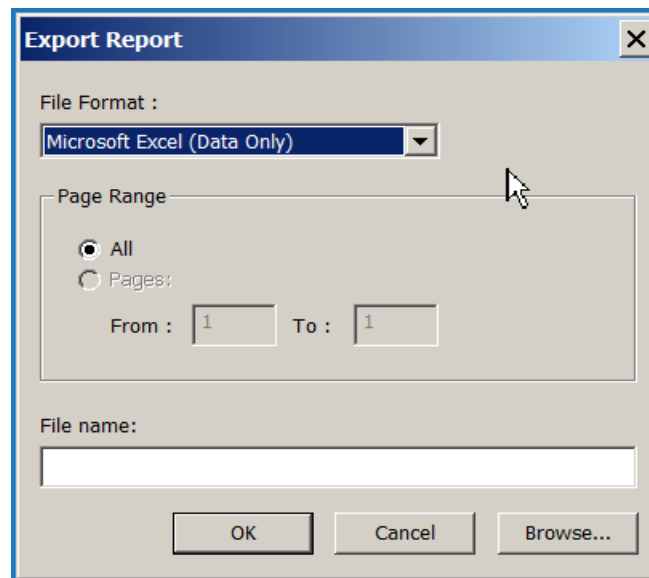
All reports can be exported to Excel.

#### To export a report to Excel:

1. Click the envelope icon located in the in the upper-left corner of the **Report** screen, or click the **Excel** button located in the upper-right corner of the **Report** screen.

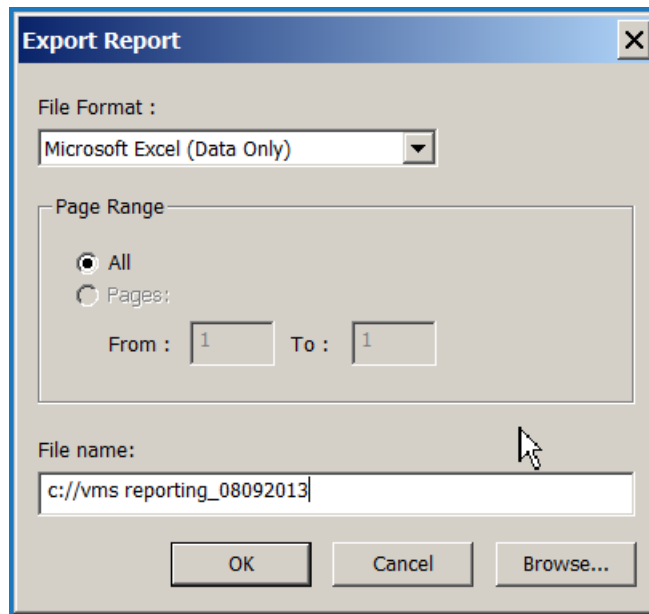


The **Export Report** dialog box displays.

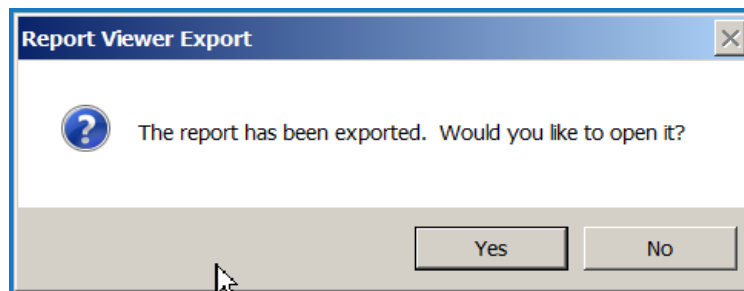


2. On the **Export Report** dialog box, perform the following actions:
  - a. Select **Microsoft Excel (Data Only)** as the File Format.
  - b. Select the range of pages that you want exported.
  - c. Type the complete path where you want to save the file in the **File name** field. Alternately, click **Browse**, and navigate to the desired path.

## VOYAGER INTERFACE BASICS



3. Click **OK**. The report is exported. The system presents a confirmation message.



4. Click **Yes** to open and view the report. Click **No** to exit the message without viewing the report.

## VOYAGER INTERFACE BASICS

### Create Memos

In Voyager, automated memos and manual memos are available. You can create a manual memo; however, some Voyager actions, such as sending a custom letter or making or rescheduling appointments, causes Voyager to automatically create a memo. In this section, we provide steps for creating a manual memo.

#### Creating a Manual Memo

To create a manual memo:

1. From inside a screen, for example the **Resident** screen, locate the **Data** section, and click the **Memo** link.

The screenshot shows the 'Resident' screen in the Voyager system. It is divided into several sections:

- Resident Information:** Fields for First Name (Lauren Nicole), Last Name (Smith), Address, City-St-Zip (Atlanta, GA), E-mail, Alt. E-mail, Office, Home, FAX, and Mobile.
- Property Info:** Fields for Resident ID (t0001638), Property (pg\_cap03), Unit (DPA\_090), Status (Current), Legal (N/A), Payment Method (Any), and Payable Method (Check).
- Functions:** A list of actions including Renew Lease, Adjust Lease End, Month to month, Reverse Move In, Notice, Move Out Calculator, Evict, Assign Unit, Charge, PRH Tenant Hold, Legal, and Credit Check.
- Data:** A section containing links for Lease Charges, Inspection, Roommates, Attachment, **Memo** (highlighted with a red box), Contact, Email, EFT Setup, and Credit Card Setup.
- Lease Info:** Tabs for Lease Info, Deposit Info, Lease Charges, and Other Info.
- Lease Information:** Fields for Mkt. Rent (0.00), Rent (0.00), Due Day (1), and Other Charges (0.00).
- Late Fee:** Fields for Base % (0.00), Grace Period (0), and % Owed-total.

## VOYAGER INTERFACE BASICS

The **Memo Information** window displays.

- Use the following information to help you complete the necessary fields on the **Memo Information** window.

<b>Date</b>	Accept the default date or type/select another date.
<b>Time</b>	Accept the default time or type/select another time.
<b>Type</b>	Select the category of action this Memo falls under. For example, Case Tracking, Compliance, Inspections, Overpayment, Portability, Aging Well.
<b>Status</b>	Select <b>Scheduled, In Process, Completed, Cancelled, or Memo.</b>
<b>Result</b>	Leave blank.
<b>Agent</b>	Leave blank.
<b>Show on Calendar</b>	Select this option if you want a link to the memo displayed on the

## VOYAGER INTERFACE BASICS

	dashboard calendar.
<b>Property</b>	Click the <b>Property</b> link to search for a property. Alternately, if you know the property code, type it in this field.
<b>Unit</b>	Click the <b>Unit</b> link, and select a unit from the list.
<b>Unit Type</b>	Click the <b>Unit Type</b> link, and select a unit type from the list.
<b>Employee</b>	Click the <b>Employee</b> link, and select an employee from the list.
<b>Notes</b>	Document the call and any next steps taken or provided to the caller. Type all notes in ALL CAPS.

- Click **Save**. The memo displays in the list at the top of the **Memo Information** screen.

**Memo Information** Memos for: Cosby Spear A (t0000004)

Date	Type	Status	Notes
10/25/2013	Case Ticketing System	Memo	

---

Date:   Show on Calendar

Time:

Type:  [Property](#)

Status:   [Unit](#)

Result:   [Unit Type](#)

Agent:   [Employee](#)

Notes

- Click **Close** to complete the record.



## VOYAGER INTERFACE BASICS



Make sure that you close the current memo before entering a new record.