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.

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Contents

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</div>

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
Publich 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.

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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**.
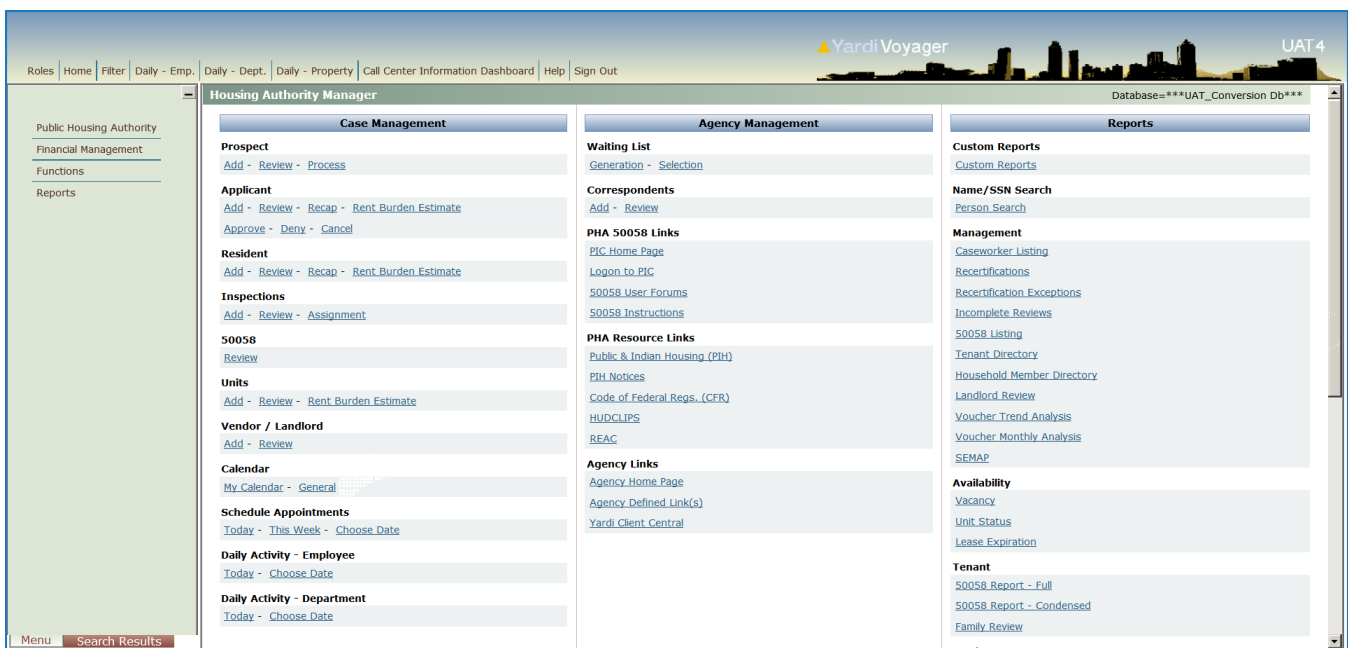
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Home Screen

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.
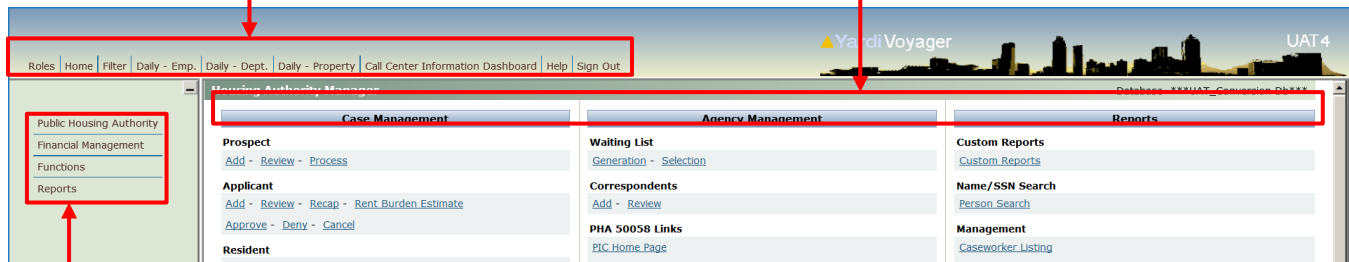
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Home Screen Menus

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

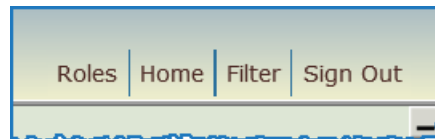The **Top** menu provides access to the basic areas of Voyager.

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:

Roles	Use this option to select a specific job role depending on the tasks you need to complete.
Home	Use the Home option to return to your Home screen from any area in Voyager.
Filter	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.
Sign Out	Use this option to exit the Voyager system.

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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:

Public Housing Authority	Contains many of the administrative functions in Voyager.
Financial Management	Contains financial functions.
Functions	Contains popular functions you use based on your job role.
Reports	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.

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Customer Services Group Main Menu			Database=***UAT_Conversion Db***

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

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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)

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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**.
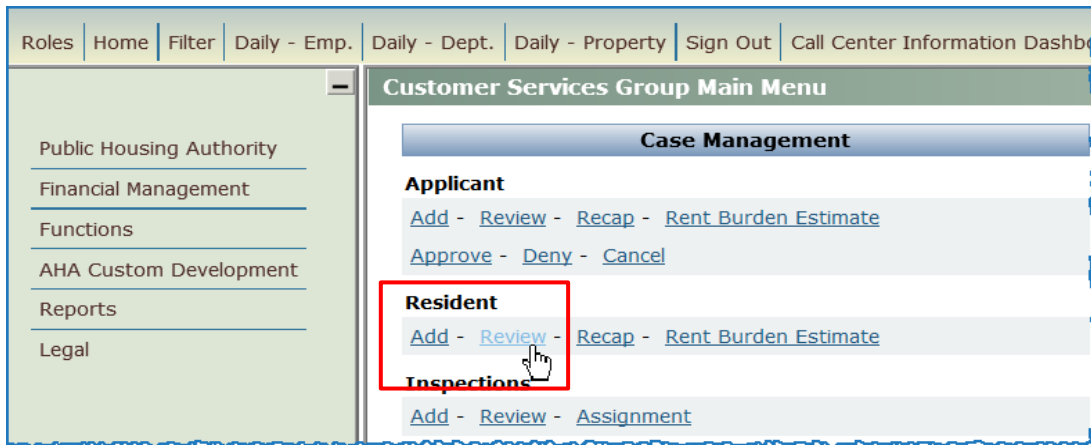
The **Resident** search and filters display.

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**.

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AHA university

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

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

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

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

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

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

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	

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	

Subsidized ☑

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

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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.

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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 records.

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.

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Family Detail Info

Family Info

Property	vo_nomtw	Tenant	t1031666	Caseworker	
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	
Last Action ...		Effective Date	08/31/2011		

Save | Alerts (1/0/0) | Help
Add 58 | Review 58 (1) | Manage 58s

Functions
Clear All Verifications
Issue Offer
Update Vo/RFTA Status

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.

| Summary | General | Admission | Special Programs | Delinquency |

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

Data
Attachment
Contact
Memo (2)
Unit PHA Program Info
Inspection
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

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

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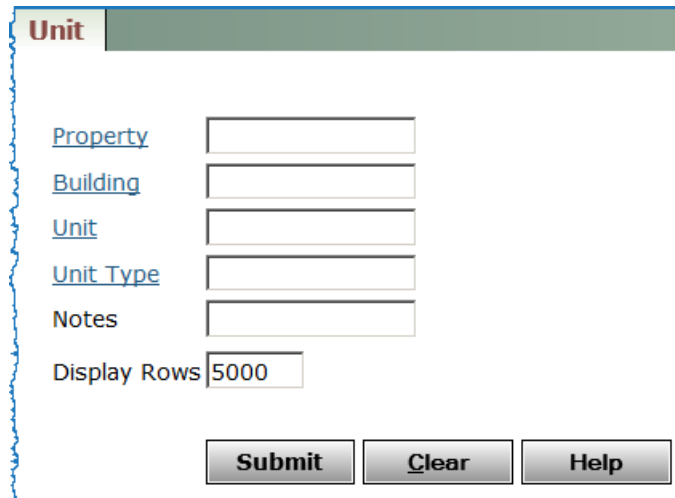
Unit Screen

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**.
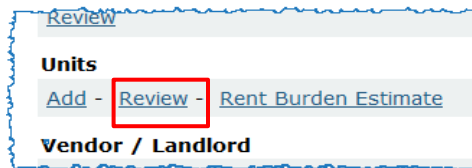
The **Unit** search and filters displays.

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**.

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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.
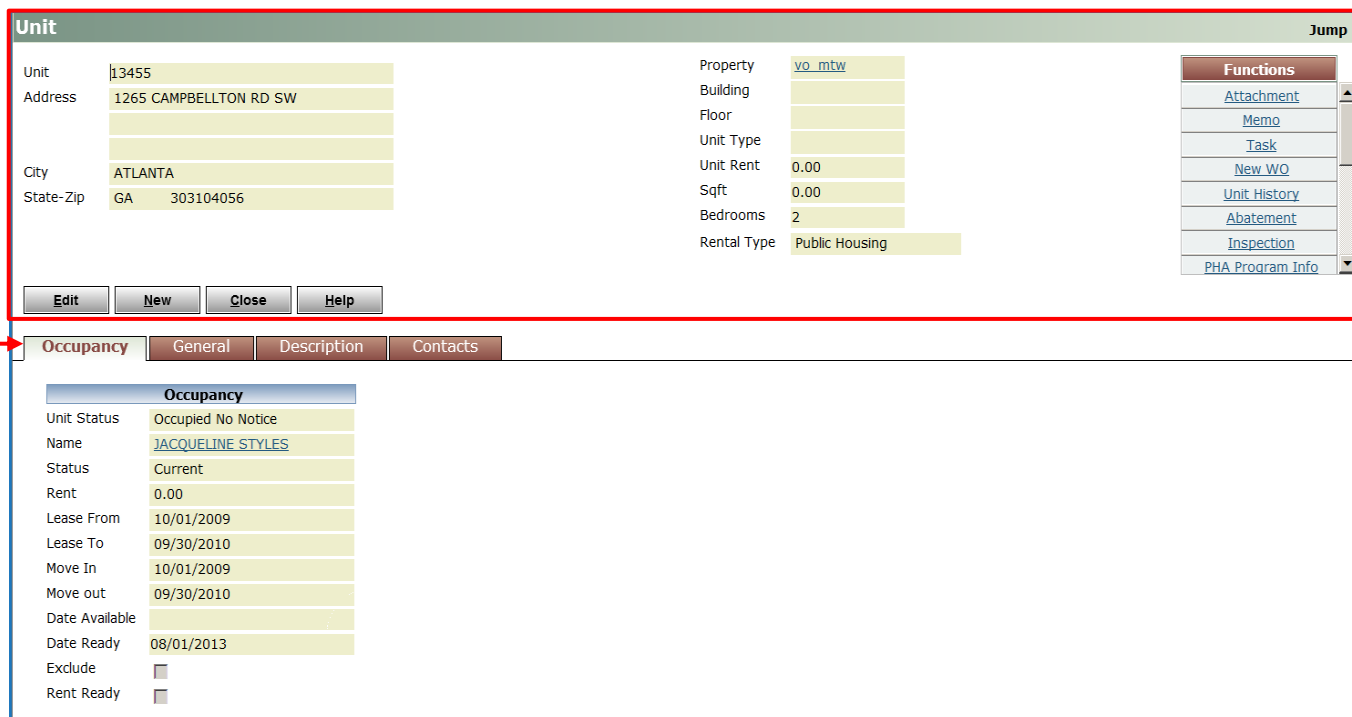
Screen tabs:

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.

Unit				Jump To
Unit	13455	Property	vo_mtw	**Functions**
Address	1265 CAMPBELLTON RD SW	Building		Attachment
		Floor		Memo
		Unit Type		Task
City	ATLANTA	Unit Rent	0.00	New WO
State-Zip	GA 303104056	Sqft	0.00	Unit History
		Bedrooms	2	Abatement
		Rental Type	Public Housing	Inspection
				PHA Program Info

Buttons: Edit | New | Close | Help

Tabs: **Occupancy** | General | Description | Contacts

Occupancy	
Unit Status	Occupied No Notice
Name	JACQUELINE STYLES
Status	Current
Rent	0.00
Lease From	10/01/2009
Lease To	09/30/2010
Move In	10/01/2009
Move out	09/30/2010
Date Available	
Date Ready	08/01/2013
Exclude	☐
Rent Ready	☐

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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**.

Vendor / Landlord
Add - Review
Calendar
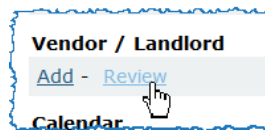
The Vendor search and filters display.

Vendor

Vendor	v0002382
Last Name	
Address..Zip	
Telephone Nos.	
Tax Id	
Fed Name	
Workers Comp Exp.	-to-
Tax % >=	
Notes	
Display Rows	5000

Submit   **Clear**   **Help**

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**.

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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.

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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

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	☑
Check Memo From Inv	☐
Hold Payments	☐
PO Required	☐
No Signature	☐
On Checks Over	0.00
Memo	

[Edit] [New] [Close] [Help]

Data

Attachment
Memo
Contact
Email
EFT Setup
Ledger
Commodity Codes
Vendor Eligibility
Landlord Foreclosure
Landlord Date Entered
Vendor Service Provider
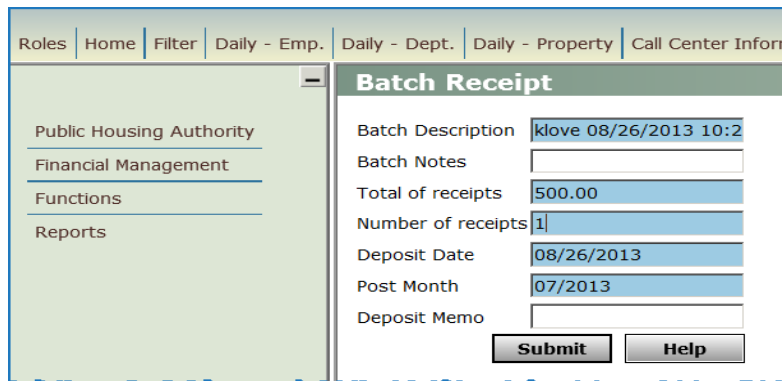Abatement
Prop List

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

General | **Other Info** | **Tax Info**

Inactive	☐	
Employee	☐	
Language		
Usual Account		

URL

Notes

Discount

Percent	
Day	30
Days from Invoice	⦿
Day of the Month	○
Payment Terms	30

Insurance Expiration

Liability	
Workers Comp	

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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.

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Searching with Filters
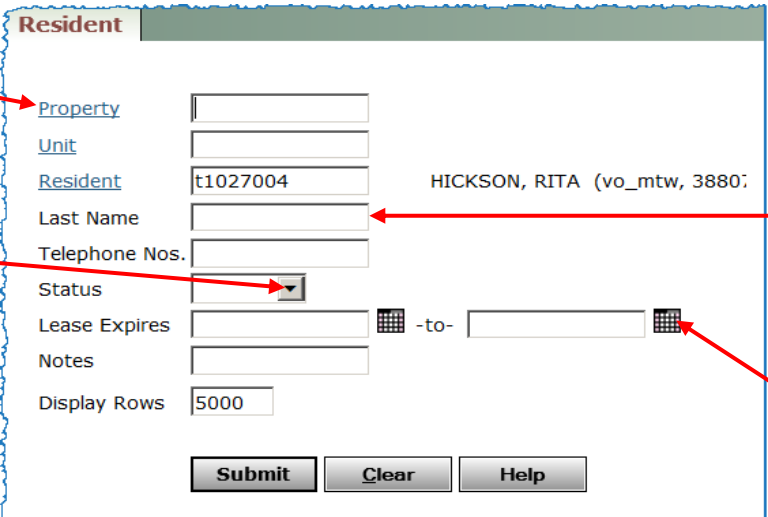
There are two ways to find information in Voyager:

- 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.

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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**.

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.

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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.

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Click the link.

A filter window displays.

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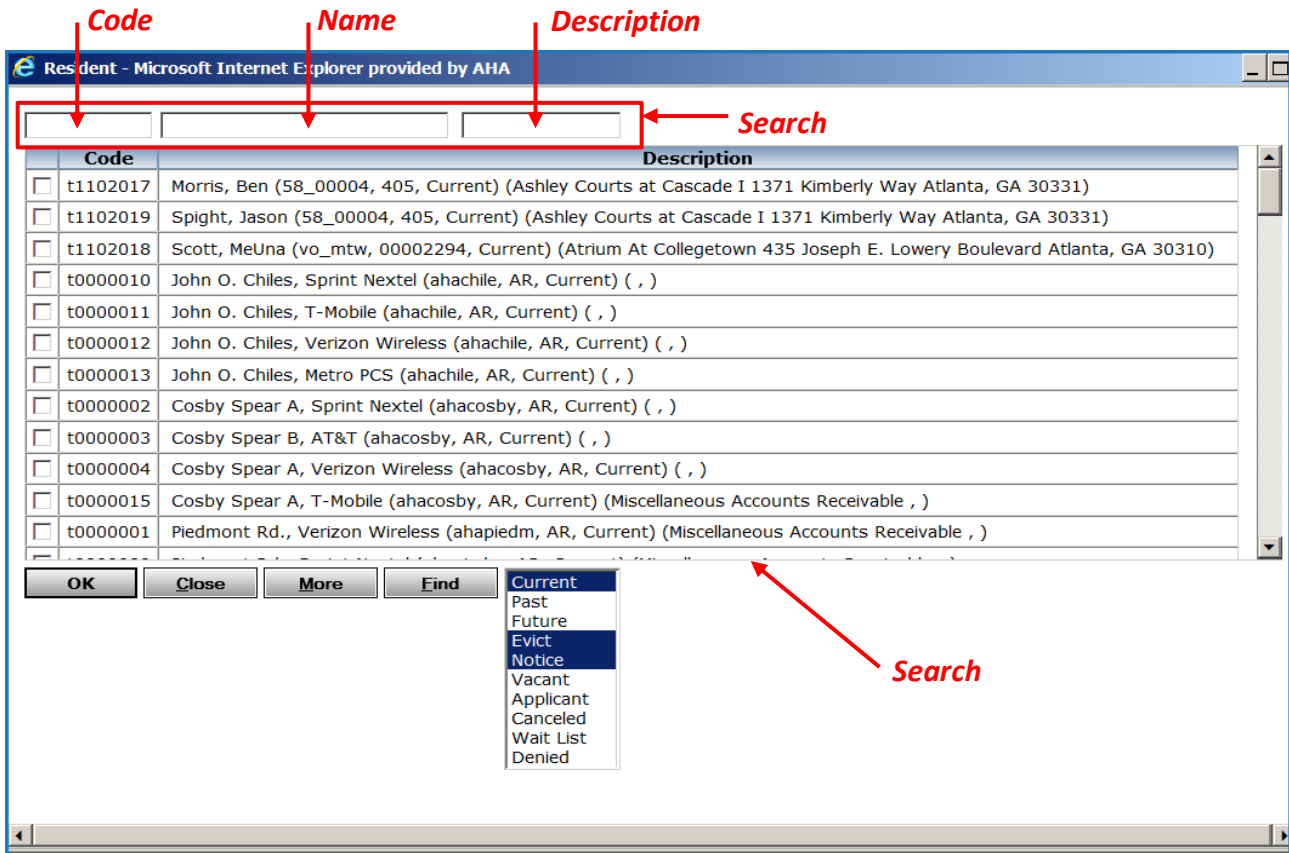
These fields allow you to narrow the search results to a smaller list:

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)

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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**.

Search

Search Filter
(Select the Resident status)
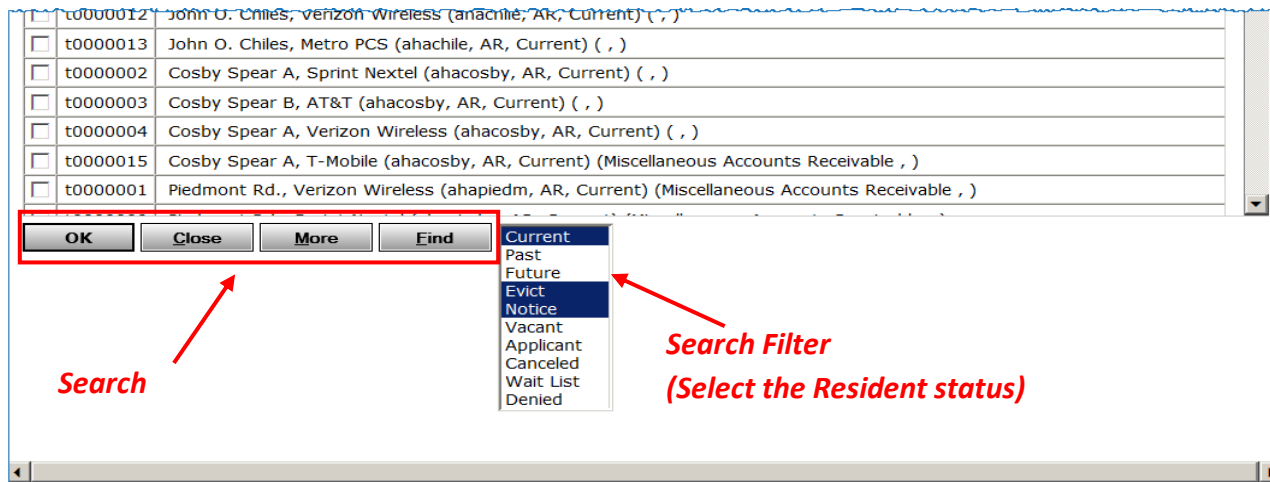
OK	After you select an option from the list, click **OK** to close the filter window and populate the result in the search screen.
CLOSE	Exits the filter window without making an identified selection.
MORE	Shows additional results that are currently not displayed.
FIND	Narrows the result list.
	⚠️ **IMPORTANT**: 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.

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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.
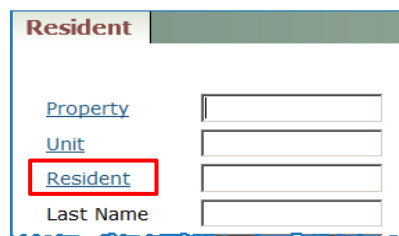
Search Using the Wildcard Character (%)

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 Resident search filter screen displays.

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

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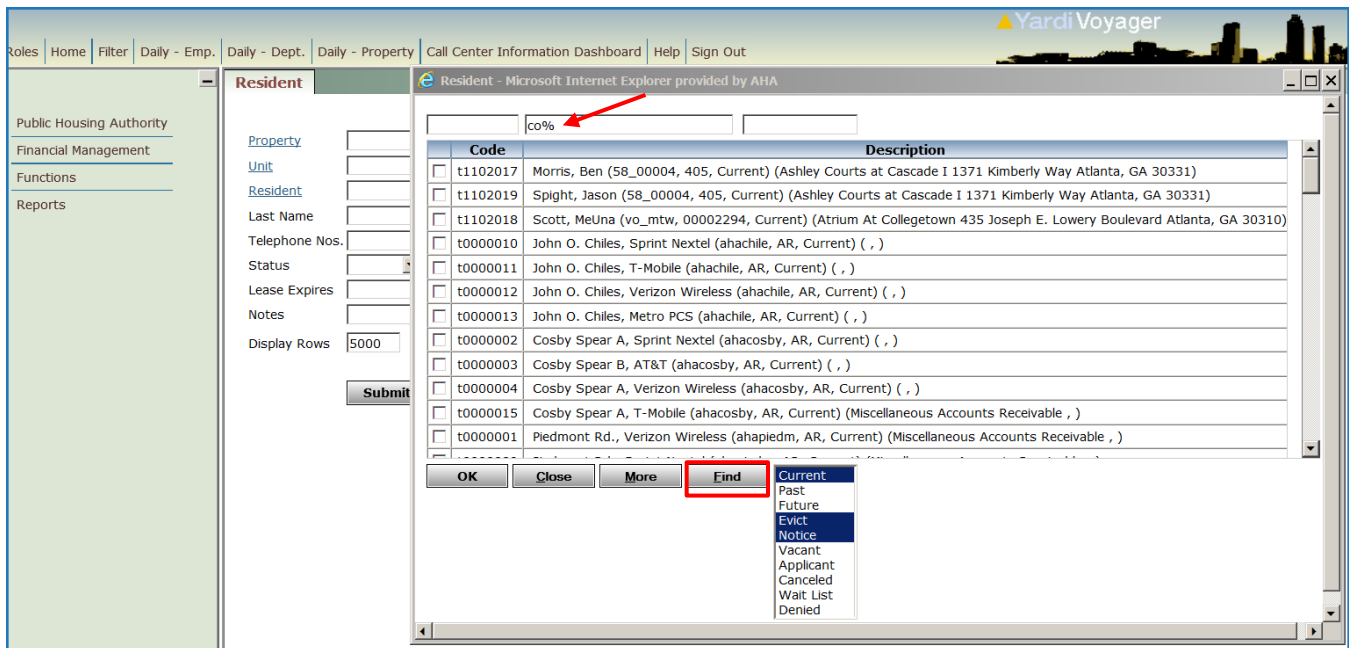
All names that begin with the letters co in the description display in the results.

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

4. 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

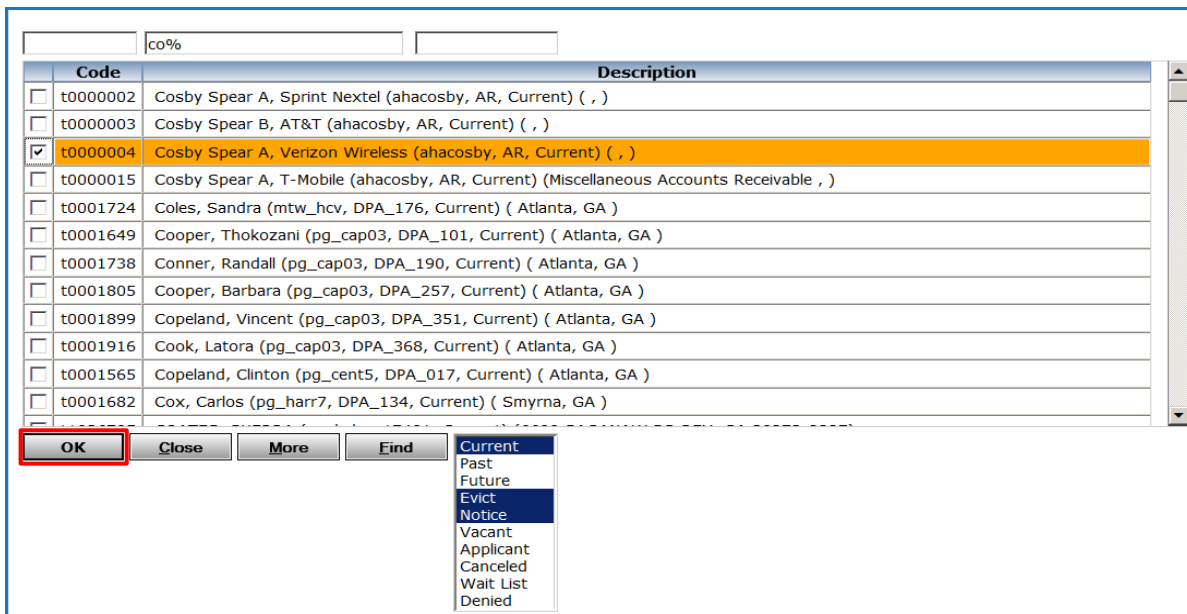If you work with participants or applicants, it is critical that you have the correct record for each individual. You can use the **Person Search** to see if a person is a current or past participant. There can also be more than one person with the same name and to ensure you are working with the correct 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:

1. From your **Home** page, locate the **Reports** Quick link section.

2. Under the **Name/SSN Search** section, click the **Person Search** link.

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The **Person Search** screen displays.

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.

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Customer Services Group Main Menu		Database=***UAT_Conversion Db***

Case Management

Applicant
Add - Review - Recap - Rent Burden Estimate
Approve - Deny - Cancel

Resident
Add - Review - Recap - Rent Burden Estimate

Inspections
Add - Review - Assignment

50058
Review

Units
Add - Review - Rent Burden Estimate

Vendor / Landlord
Add - Review

Calendar
My Calendar - General

Schedule Appointments
Today - This Week - Choose Date

Daily Activity - Employee
Today - Choose Date

Daily Activity - Department
Today - Choose Date

Agency Management

Waiting List
Add - Review
Generation - Selection

Correspondents
Add - Review

PHA 50058 Links
PIC Home Page
Logon to PIC
50058 User Forums
50058 Instructions

PHA Resource Links
Public & Indian Housing (PIH)
PIH Notices
Code of Federal Regs. (CFR)
HUDCLIPS
REAC

Agency Links
Agency Home Page
Agency Defined Link(s)
Yardi Client Central
Criminal Background Screening
Inspection Photo
Address Validation/Add Unit

Centralized Links

Reports

Custom Reports
Custom Reports

Name/SSN Search
Person Search

Management
Caseworker Listing
Recertifications
Recertification Exceptions
Incomplete Reviews
50058 Listing
Tenant Directory
Household Member Directory
Landlord Review
Voucher Trend Analysis
Voucher Monthly Analysis
SEMAP

Availability
Vacancy
Unit Status
Lease Expiration

Tenant
50058 Report - Full
50058 Report - Condensed
Family Review

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.

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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.

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.

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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.

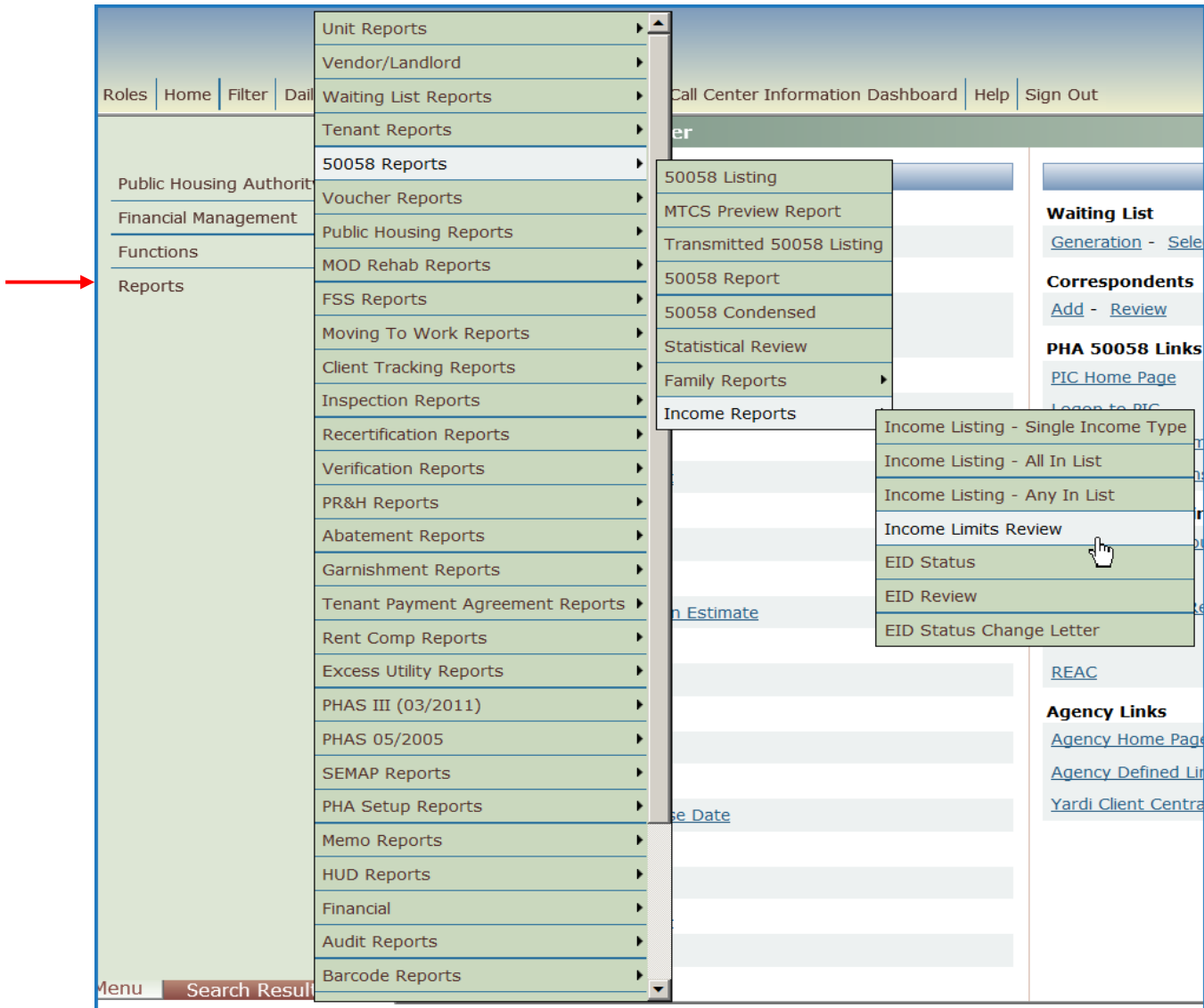From the **Side** menu, click **Reports**, and navigate to the desired report. If a search filter screen displays (See the Searching with Filters section on page 22 for instructions about searching and filtering.), use the search filter screen to determine the range of information that display on your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

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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.
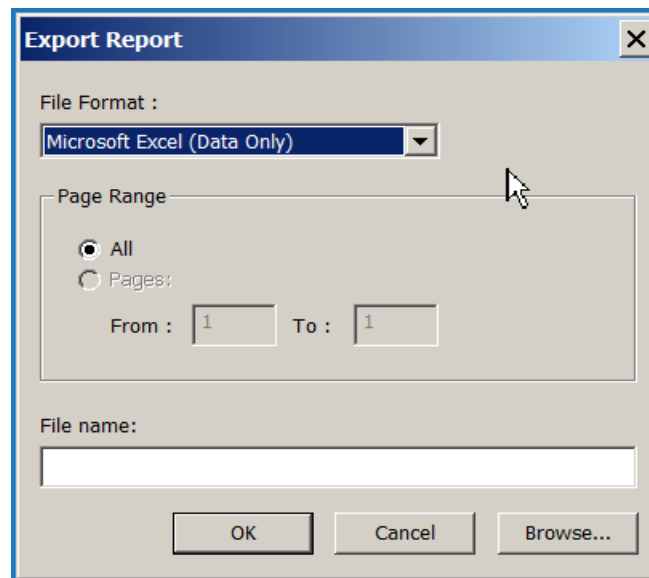
Export a Report to Excel

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.

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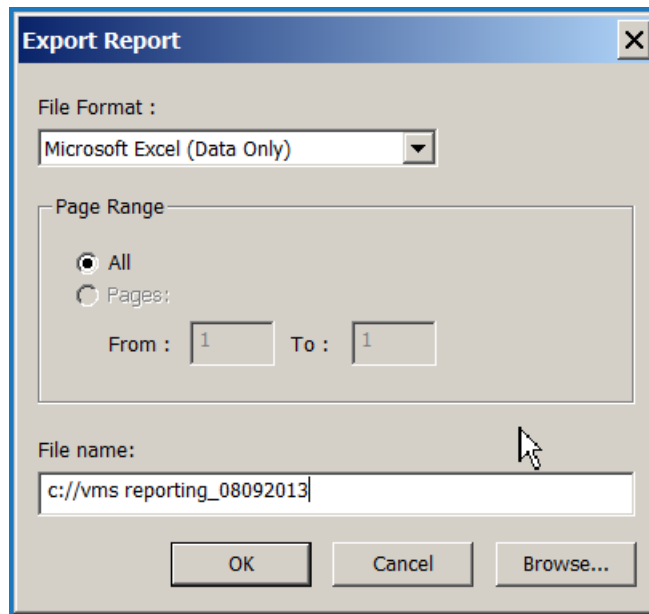
3. Click **OK**. The report is exported. The system presents a confirmation message.
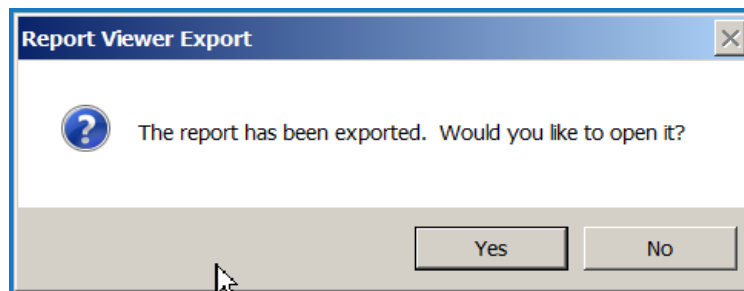
4. Click **Yes** to open and view the report. Click **No** to exit the message without viewing the report.

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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.

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The **Memo Information** window displays.

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

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

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

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

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

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