# vela video library

💡 **Important:** The video library is intended to be a quick reference guide. In-depth Vela information is in the Vela Handbook.

## What type of videos are you looking for? (Click one)

**Short "How To" Videos**      **Vela 101 for New Staff**

## Quick "How To" Videos

*Learn how to complete specific tasks in Vela by clicking on a link below. Each bullet point is a video link.*

### My Account

- Change Your Password
- 2FA (Two Factor Authentication) Methods
- Setting up Authenticator (In Chrome & App)
- Outlook Calendar Integration
- Edit User Settings
- Update Your Account Image
- How to Logout of Vela

### Dashboard

- What's the Main Dashboard?
- Search for an Existing Client
- Tracking a Group Service Provided to Multiple Clients
- Adding Clients to New Groups
- Using Data Grids throughout Vela
- Add Shift Notes
- Create or Edit a Client

### Enrollments

- Create a New Enrollment for a Client
- Exit a Survivor from a Program
- Add an Update to Enrollment Details
- Delete Exit Information

### Services

- Add a Service to a Client
- Incidents and Victimizations in Vela
- Custom Staff Notifications
- Court Information Tracking

### Hotlines

- Create a New Hotline Call
- Hotline Call Topics: Overview and Reporting
- View Call Details

### Time Tracker

- Using the Calendar
- Add an Activity
- Generate a Staff Timesheet
- Quickly Update Billing Info for Services, Hotlines, and Activities

### Client Files & Client Management

- Program Calendar: Who's in Shelter?
- Incidents and Victimizations in Vela
- Printing Client Files/Information
- How to Merge Clients
- The Incident Grid: Sorting by Offender, Survivor, and More
- Merge Incidents
- Change Client Types

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## Staff Management

- **Add a New Staff/Volunteer**
- **Reset a Staff's Password**
- **Add New Grant Sources to Staff**
- **Custom Fields in Staff Management**
- **Who Can Download Reports and Grids**

## Report Module

- **How to Run a Pre-Built (One-Click) Report**
- **How to Run a Flex Report**
- **Filtering Custom Fields**
- **Using the Flex Report Grids to Get the Info You Need**

## Creating Forms & Custom Fields

- **Create a Custom Form**
- **Designing Questions**
  - **Grid Questions**
  - **Moving a Question in a Form**
  - **Question Rules/Conditional Form Logic**
- **Enabling & Disabling Questions (Forms)**
- **Enabling & Disabling Questions: Custom Fields**
- **Date Filtering for Forms/Custom Fields Summaries**

## Outcomes

- **Forms vs. Outcome Surveys**

- **How to Pull Aggregated Data Using Outcomes Report**
- **FVPSA Outcomes**

## Admin Module

*Are you a site admin who needs Vela training? Reach out to support to schedule a session!*

- **Enrollment Custom Fields**
- **Staff Custom Fields**
- **Preview Outcome Survey from Design Mode**
- **Client Assistance Type**
- **Call Topics Overview and Reporting**

## Site Settings
(Contact Vela Support to Enable or Edit)

- **"Referred by" Referrals**
- **Program Level Confidentiality**
- **Restricting Client Access**
- **Assigning Caseworkers to Clients**
- **Access Level: Timesheet Approval Only (No Client Info)**
- **Sending Intake Forms to Clients**
- **Copy Custom Service Fields when clicking "Save and Add Another"**
- **Recurring Services**
- **Custom Timesheet Signature Wording**

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## Vela 101: New Staff Onboarding

*Whether you are new to your organization or need a refresher, these videos will help you master Vela basics.*

🛑 **NOTE:** If you need a **training certificate for documentation purposes**, please **register for our Vela New Staff Onboarding** e-learning module. The certificate is only available when the videos are completed as part of the full module.

- To register and complete the self-paced onboarding module (which includes all videos and issues a certificate upon completion), click here.
- To register to view the Form Manager webinar recording (and receive a completion certificate), click here.

If you prefer to view the videos individually without registering (and do not need a certificate), click the links below:

- **Intro to Vela and Element74**
- **Vela Basics: Navigating, Clients, Services, and Hotlines**
- **Vela Basics: Activities and Timesheets**
- **Vela Basics: Reporting Overview**
- **Form Manager Webinar Recording**