On Boarding Instructions- February 2023

If you need assistance with any aspect of the Veoci platform, please contact us at info@dillingerrad.org.

Veoci basically organizes data as a spreadsheet (called the Grid View), however data entry can be done in a variety of ways to best suit the needs of the user. Data collection is done either through the use of forms or workflows. In each case the data collection can be customized to streamline the process. A series of standard data collection forms and workflow have been created for your organization. Additionally, a standard dashboard has been created within the Veoci platform for your organization.

1. **Forms**: Forms are typically used for one step data collection processes. Data is entered into the form in a single sitting. (For example: Data regarding Tier One-Direct Services, including a description of the program and number of participants could be entered following a large group event or short term service/program)

2. **Workflows**: Workflows are typically used for data collection processes that involve multiple steps that are done in the same order each time. Data can be entered into the workflow in steps over an extended period of time. Until all steps in the workflow are entered, the workflow remains "open". (For example: Data regarding work being done with youth referred through the JRB process could be started during the intake process- step one, then services and programs recommended could be tracked- step two, then the closeout information could be recorded- step three. At this point the workflow would be complete.) Workflows allow related information to be grouped together for easy access, review, and analysis.

3. **Dashboard**: The organizational dashboard is the place where you can access all forms and workflows to enter data as well as where you can access existing data and records.

Veoci also has several additional capabilities to enable further automation and streamlining of day to day processes. These additions will not be in the initial set up but can be added to your system in the future. Additionally, all forms and workflows can be accessed by an external link. This allows forms to be shared with external partners (youth, families, and other stakeholders) as well as enabling temporary staff (such as interns) to enter data without accessing all records.
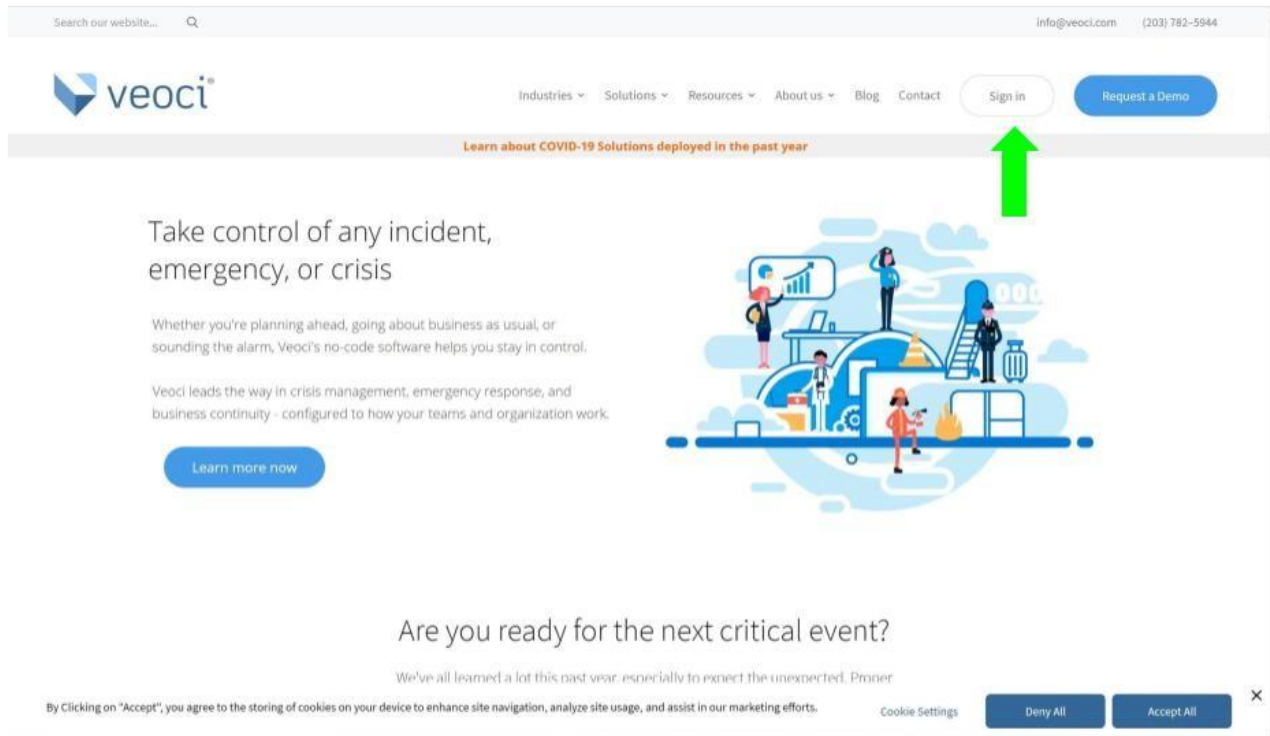
Quick Links:

Step 1: Signing In

To log into the system, go to veoci.com and click on the Sign In button on the top right side. You will be asked to enter your username (email) and password. If it is the first time you are logging in, it will ask you to create a password. Multiple individuals in your organization can utilize the same login, even at the same time. If multiple users are using the same login we recommend that your organization develop a system for tracking who is entering what data.

Step 2: Navigating the Home Page

Once logged in, the system will bring you to the home page. There are numerous options, but the two most important are the *Admin Panel* option on the bottom left and the **Help Desk** link on the bottom right. Admin Panel is where you can go to access your dashboard and the Help Desk is where you can go to find helpful articles on features and components within the system as well as advice for troubleshooting issues.
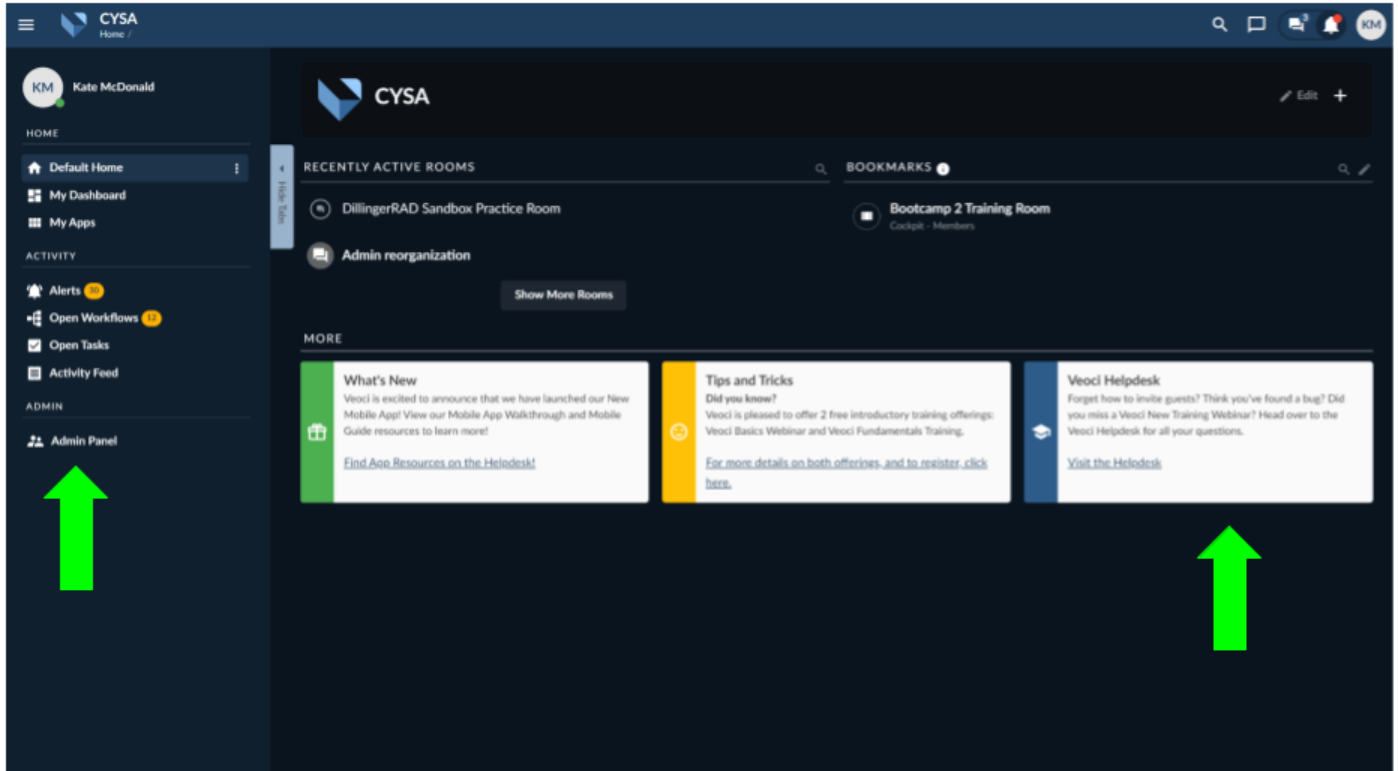
Step 3: Admin Panel

Clicking into the Admin Panel will give you access to any groups and rooms that you are a member of in Veoci. Veoci is structured with an overarching Organization. The organization is subdivided into distinct groups and then groups are further divided into rooms. The Organization is owned and operated by CYSA; each participating YSB will have their own secure group to work within. ***Although CYSA owns the organization, CYSA staff do not have access to any groups that are the domain of a different YSB. Each individual only has access to groups (YSBs) that they are an employee of.***
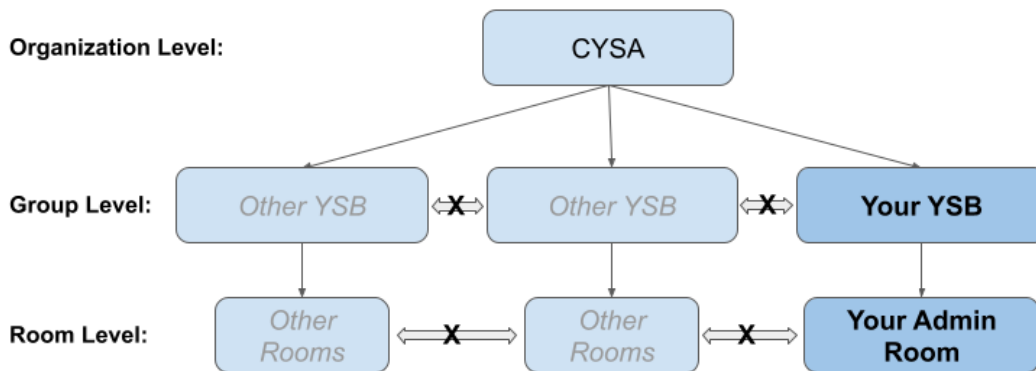
One Admin room is preset per group. The primary focus is to compile data to help track all DCF required data points. Additional rooms can be created under each group in the future. Rooms can focus on whatever the organization would like including individual youth or programs.

Data for each organization is collected at the group level (forms and workflows are located in the group) and then rooms within the group can be set up to help organize and visualize the existing data. ***When navigating through Veoci it is important to pay attention to what level you are currently working in (organization, group, or room level) to ensure data is managed properly.*** To begin, each YSB will be set up with one admin room to manage activity and data. Additional rooms can be added in the future to address and focus on different tasks and areas of work. In the example below, CYSA is the organization, DillingerRAD Sandbox is the group, and DillingerRAD Sandbox Practice Room is the room.
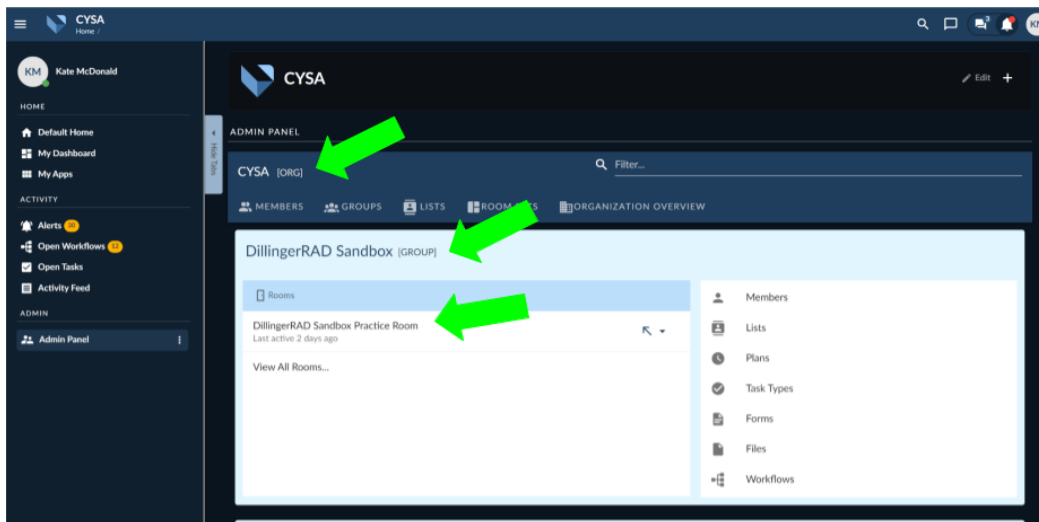
Step 4: Navigating a Room

Rooms have multiple components/views that allow you to access and see data and information you have collected.

The **light blue box icon** on the top right of the screen allows you to switch between different room components.

1. The **dashboard** allows information to be organized and displayed based on the needs of the organization. The dashboard will be preset based on the required DCF information. The dashboard is the default display when you click into your admin room.
2. The **cockpit** displays a history of activity in the room. If your organization has multiple licenses then the users can also utilize the cockpit to send messages within the system.
3. The **grid** is the location of all the raw data that makes up the dashboard and has been collected through forms and/or workflows. Various spreadsheet views can be created and viewed within the grid. Your system has been preset with grid views that enable you to easily access all the raw data required by DCF.
4. **Maps and calendars** allow the user to visualize data in additional visual formats. Currently no maps or calendars are set up in your system but these features can be customized in the future.
5. **Details** enable the user to change the setting within the room. Details will be preset for your organization.

Currently, you will only need to access the dashboard and the grid. Additional options are available on the left of the dashboard to enable edits to be made to the dashboard and/or room. If the user clicks on one of the icons on the left, a pull-down menu will appear. In the example below the members icon has been selected. To close the window, simply click on the up arrow at the top of the open pull down. Currently, none of the icons on the left will be required so you can simply minimize the pull-down list and ignore the options.
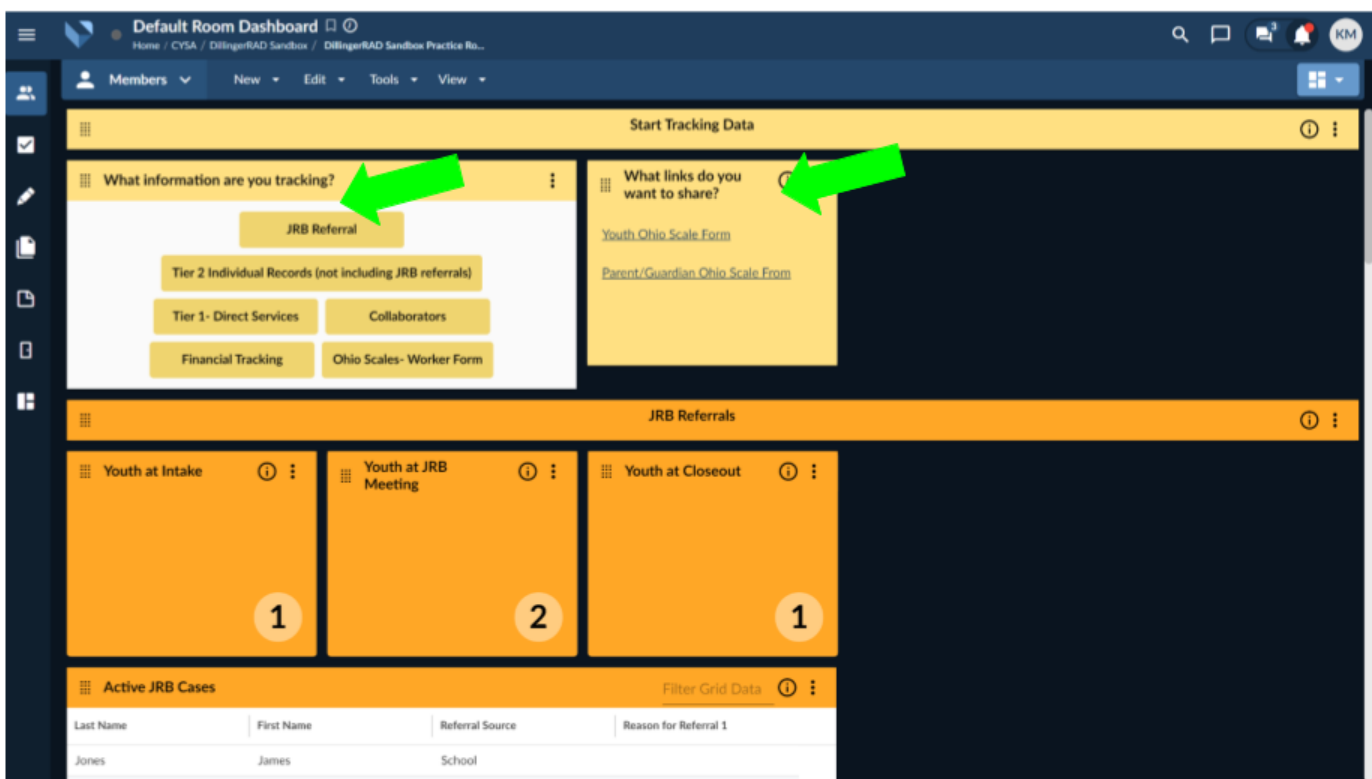
Step 5: Navigating the Dashboard

Dashboards are made up of multiple tiles. Tiles allow you to visualize data sets that are available in forms and workflows. There are different types of tiles that allow different types of information to be displayed in different ways. Tile types include: Link, Custom, Summative, Table, Summary Table, and Chart.

1. **Link tiles** enable you to easily access forms and workflow available within your system. This creates a fast and easy way to start form or workflow entries. The white and yellow tile below has links to all internal forms and workflows so that you can start new entries right from the dashboard. To begin, simply click on the title of the form or workflow you want to utilize.

2. **Custom tiles** can be created to display any information relevant to your organization. The yellow tile below ("What links do you want to share?") is a custom tile. This custom tile has been created with links to forms that would be utilized by individuals outside of the YSB. Links within this tile can be copied and shared with anyone through email or text.


3. The orange tiles below are **summative tiles**. Summative tiles can be made from forms or workflows and can be designed to summarize any available data. This set of summative tiles displays data from the JRB Referral workflow. Each tile displays the current number of active youth at each step of the JRB process. If you click on the name of the tile or the number within the tile, it will bring you to the entries that represent that tile (for example, if you click on the Youth at Intake tile, it will bring you to a grid view of all active youth currently at the intake step).
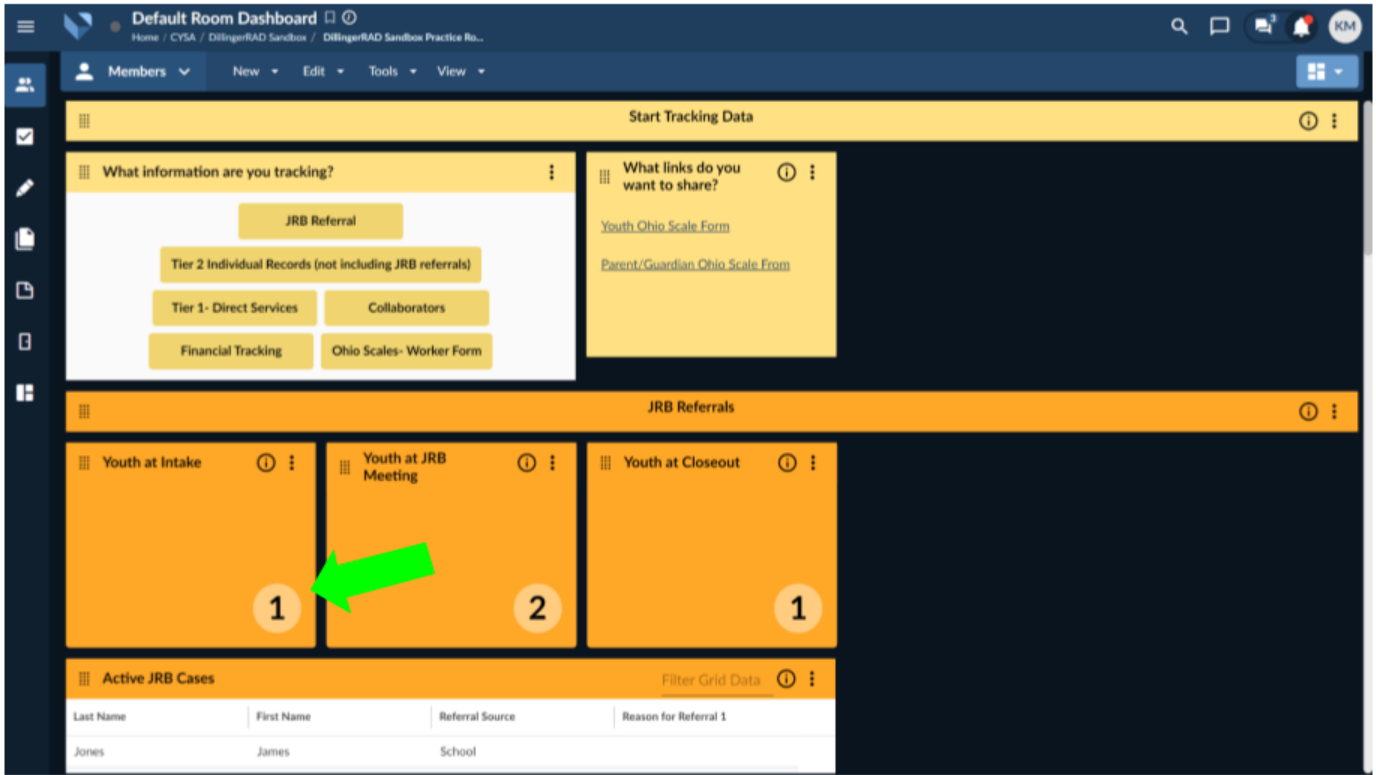
4. Information can be displayed as a **table tile**. In table tiles, select information from a form or workflow can be displayed so that only critical information appears within the dashboard. The two white and orange tables below contain select information from existing JRB referrals. The top table lists last name, first name, referral source, and reason for referral for all active JRB cases. The bottom table lists last name, first name, date of recommendation completion, and close-out date for all non-active JRB cases. As with all tiles clicking on the title of the tile will bring you to all the data that makes up the tile. Additionally, if you click on select data within the table (for example, Bob Smith within the active JRB cases table) it will open the specific form or workflow that houses those specific data points.
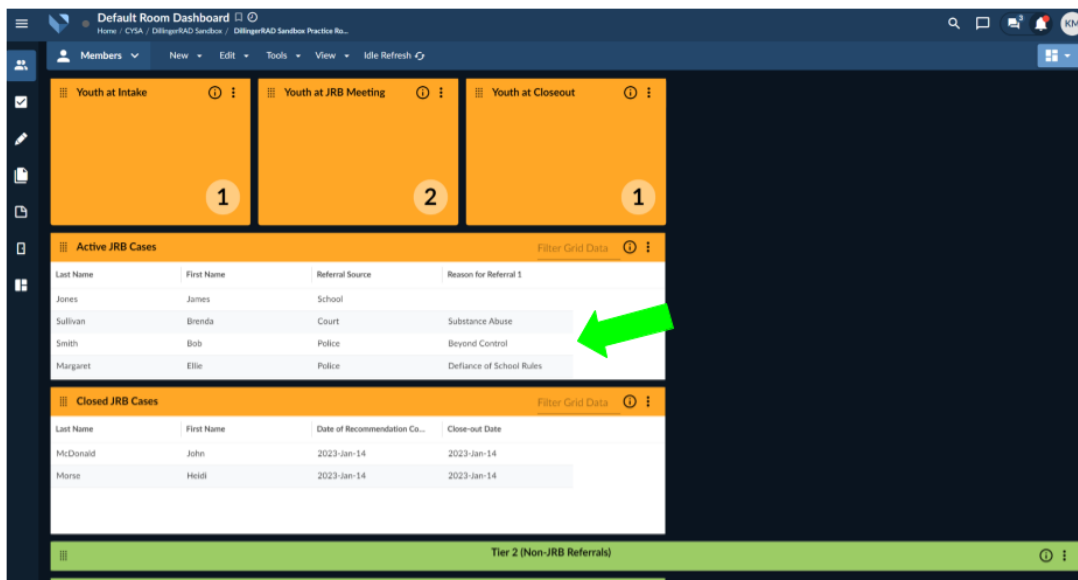
5. Table tiles can also be designed as **summary table** tiles. The two white and blue tables below contain select information from the Tier One- Direct Services form. The table on the left has select information regarding short-term services/programs and the table on the right has select information regarding large group events. Both tables are organized by program description/type and summary information or number of participants is included by program type.
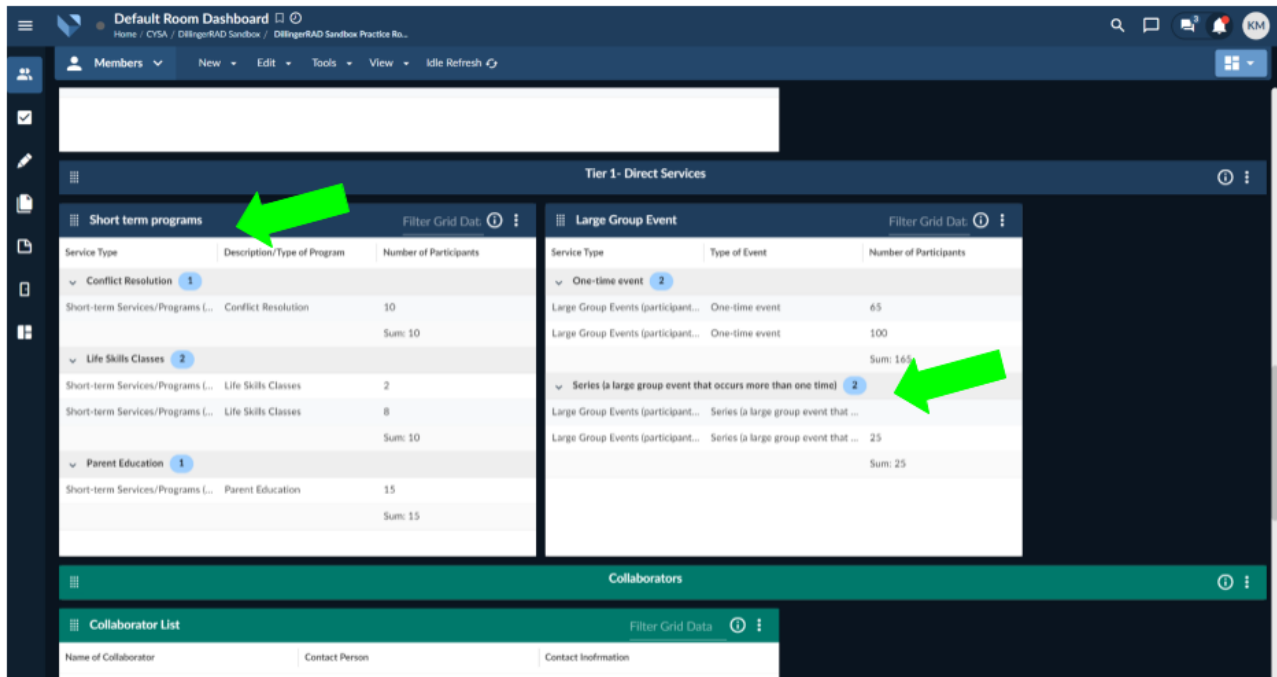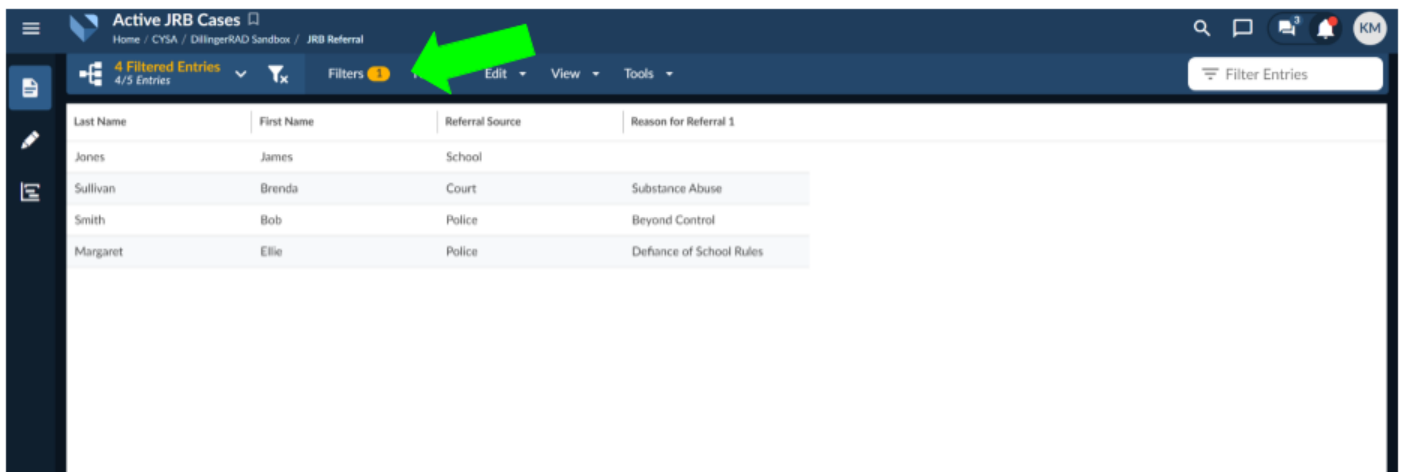

6. Finally, information collected in forms and workflows can also be displayed as a **chart tile**. Chart tiles can display various information and can be displayed in multiple ways. The white and purple tiles below display financial information collected on the financial summary form. The bar graph shows totals of dollars received from various sources, while the pie graph shows a breakdown of categories of expenditures. As with all information displayed in tiles, as more information is entered with new forms and workflows, the tiles will update automatically to incorporate the new information into the tile.
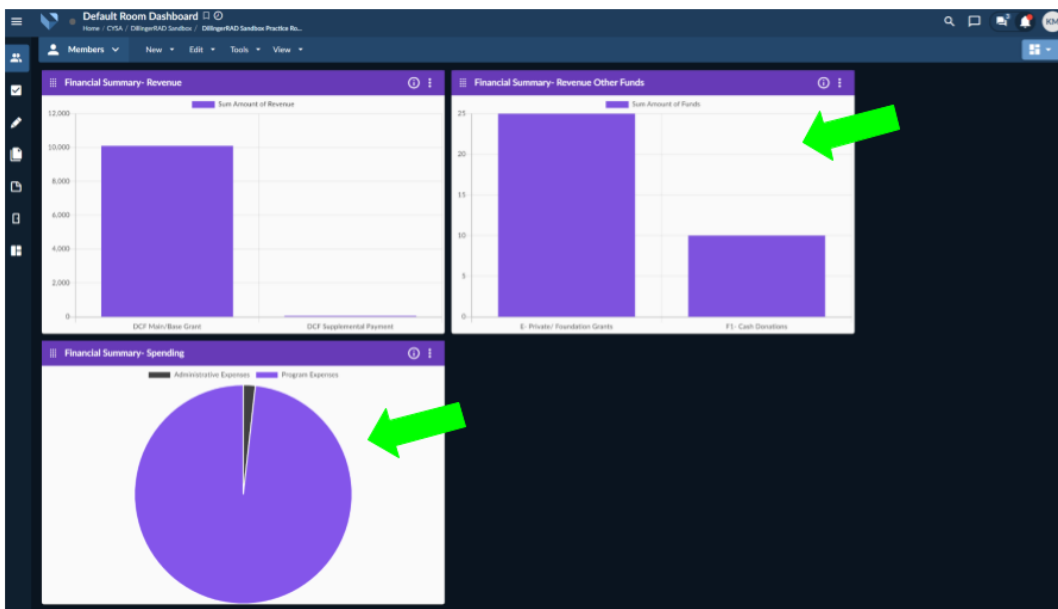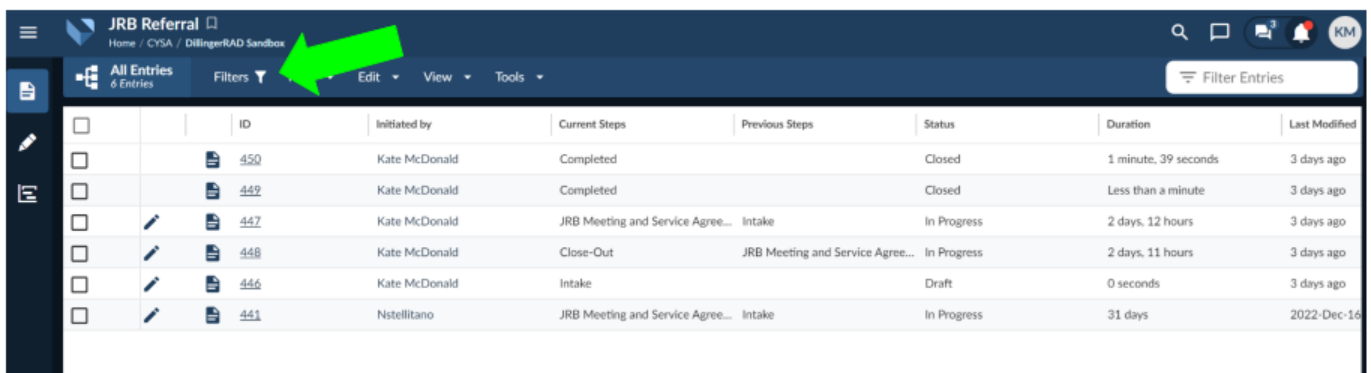
Step 6: Navigating the Grid View

To access all the data that make up a tile, the user can click on the title of the tile and it will bring them to the grid view that contains all the relevant form or workflow information within that tile. In many cases, a tile may only represent a subset of the available information for that particular form or workflow. For example, the grid view below represents the select data shown in the Active JRB tile on the dashboard. Only last name, first name, referral source, and reason for referral are currently displayed within the grid, even though the JRB referral workflow contains additional information. The limited data within the grid view is due to the fact that the Active JRB cases tile filters through the JRB referral workflow and only summarizes those cases that are currently active (have not been closed out). If a grid view is filtered there will be a number in a yellow circle at the top of the screen (see below).

If you would like to see all the entries (not just filtered entries), you can click on the filter icon (white funnel shaped icon at the top of the page) to return to all entries for the associated form or workflow. Clicking on the filter icon will remove the filters and bring up all the form or workflow entries that have been created in Veoci. To access a specific form or workflow, simply click on any part of the specific entry (row) to access the full view, once open, entries can be viewed or edited.

Step 7: Reviewing and Editing Form Entries

If you click into a form entry, the form will open in full as it appeared when it was first created. If you are simply reviewing the entry, you can scroll up and down to see all the information. To exit out of the form simply click on the back arrow in the browser (not shown) or the X at the top right of the screen. If you need to update information on the form, click on the edit button in the bottom right corner of the form.

Clicking on the edit button will allow you to edit any existing information or add any new information that was not originally entered in the form. Once changes or additions are made, click the Update button in the lower right corner to save the information, then simply click out of the form to return to the grid view or dashboard.

Step 8: Reviewing and Editing Workflow Entries

Similar to form entries, workflow entries can be reviewed and edited by clicking into the original record. Edits can be made by clicking on the edit/reopen button and selecting update when edits are complete. Additionally, you can click out of the workflow and return to your previous view by clicking on the back arrow in the browser or the X in the upper right corner of the workflow entry. One key difference between forms and workflows is that workflows are subdivided into individual steps. ***When reviewing or editing in a workflow you must first choose the appropriate step before navigating to individual data points.*** Different steps within the workflow are delineated by a blue bar. Steps can be minimized or expanded by clicking on the arrow to the right of the blue bar.

Step 9: Navigating Between Grids and the Dashboard

The easiest way to move from the dashboard to a grid view is to click on the tile title within the dashboard. Typically to return to the dashboard from the grid you can simply use the back arrows within the browser. However, if the back arrow does not return you to the dashboard you can navigate back to the dashboard in a few easy steps. First, while in the grid view, click on the group level breadcrumb at the top left of the screen (in this example the group level breadcrumb is "DillingerRAD Sandbox"). "Breadcrumbs" are used in numerous software systems and highlight the path a user has taken in the system. Veoci breadcrumbs can be utilized to move between the organizational, group, and room level.
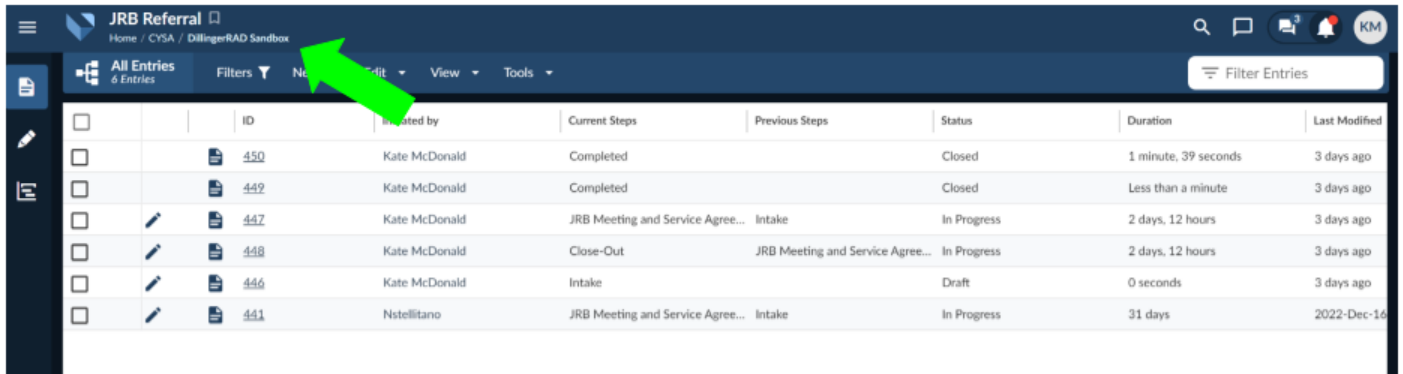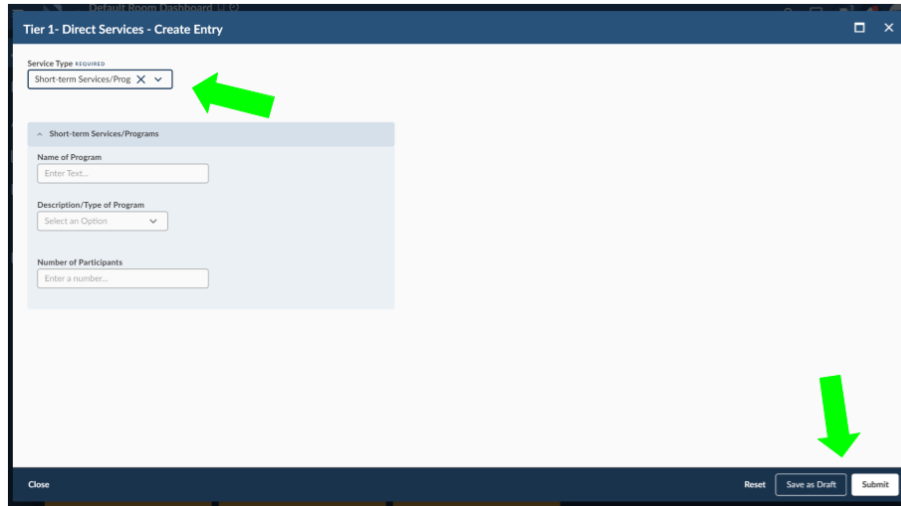

Once you have clicked into the group level there will be a number of options to the left of the screen. The door icon located in the top left corner will bring you to a list of all available rooms within your group. Select the room you would like to enter by clicking on the name of the room (in this example the room name is "DillingerRAD Sandbox Practice Room"). This will return you to the room dashboard.
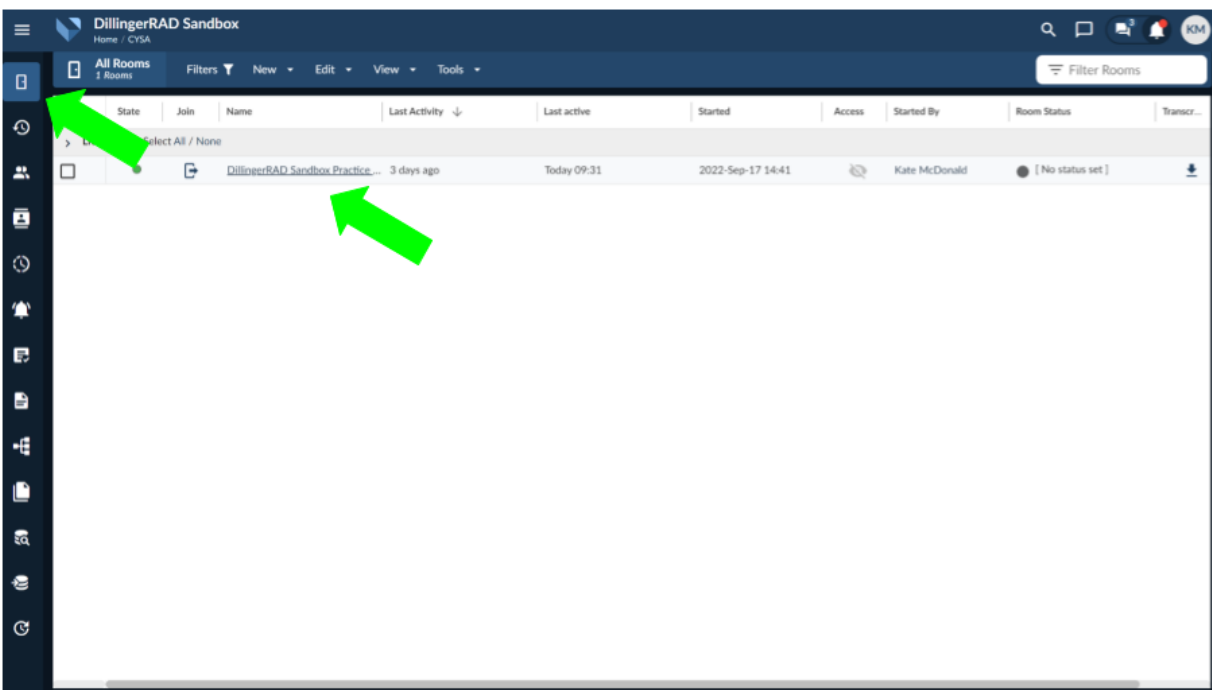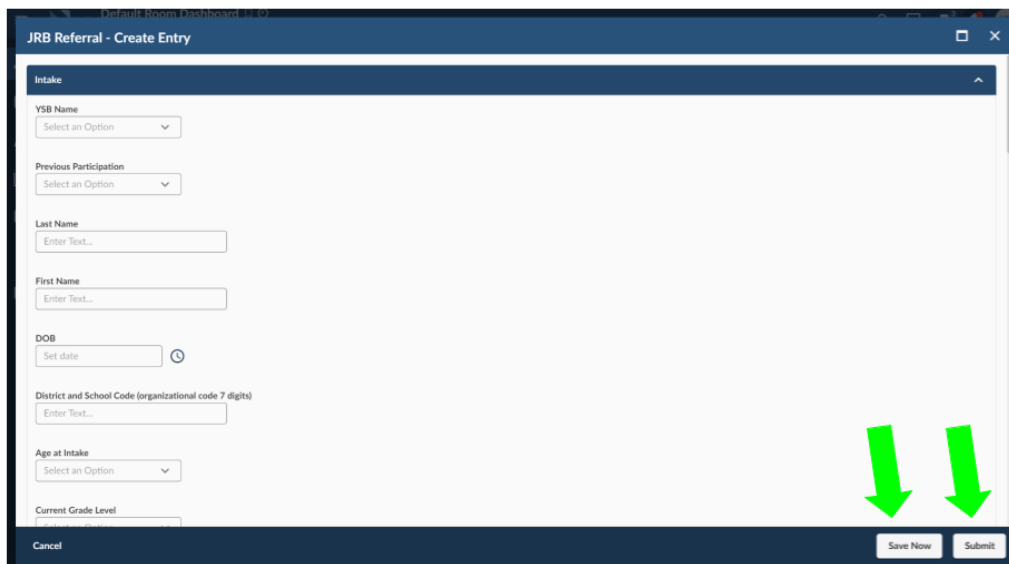
Step 10: Making Form and Workflow Entries

To create a new Form entry, you can return to the dashboard and click on the desired form in the "What information are you tracking?" tile. The form will open in a new window. Work through the form and enter all relevant information. Once complete click submit at the bottom right corner. Remember that entries can always be updated, so if there is information missing when an entry is created, it can always be changed at a later time. Forms can also be saved as a draft for completion at a later date.

Workflow entries can be created by clicking on the workflow link in the dashboard. A new workflow will always open in the first step. Data can be entered and updated at a later time, just like form entries. However, workflows have two options once data has been entered (Save Now and Submit). If the Save Now button is clicked, the workflow will save the information entered but remain on the current step. In the example below, the first step within the JRB Referral workflow is Intake. If Save Now is selected, the information would be saved and the workflow would remain on this step. However, if Submit is selected, the information would be saved and the workflow would move to the next step . Older steps can always be accessed within the workflow, so clicking submit would not prevent you from going back to the previous step to update information.

Step 11: Veoci Help Desk

Please feel free to contact us at ***info@dillingerrad.org*** with any questions. Veoci has some nice help desk options, however everything for this project was set up by DillingerRAD so folks at Veoci may not be able to address your specific questions.

If you are interested in checking out their help resources you can click into the Help Desk on the Home Page. The Veoci Help Desk provides several ways to troubleshoot problems and find answers to questions. The page has a variety of resources and help guides (some instructions and some video) that can be accessed on the top left within the page. For more difficult questions, the user can create a Veoci Help Desk Support Ticket. To create a ticket, simply click on the red link at the top right-hand side of the page (Yellow tile). Finally, if the user scrolls further down the page, the Help Desk has a Knowledge Base section. The table can be filtered to a selected topic by typing a few words into the filter area on the upper right corner of the table. The Help Desk opens in a new window, so to return to the Home Page simply click on the original tab in the browser.