Vena Platform Guide

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A quick reference for accessing, using, and managing your financial data

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What is Vena?

Vena is an **Excel-based financial platform** that connects directly to Sage and other systems to support:

- Budgeting and reforecasting
- Real-time financial visibility
- Drill-down into financial data
- Self-service reporting

Why we use it:

- Reduces back-and-forth with Finance
- Provides **direct visibility into your region's financials**
- Allows you to **analyze, update, and manage your numbers independently**
- Uses Excel → no need to learn a new system

Who has access?

All Regional Treasurers are provided access directly to the system, and can share out static files to other team members.

Quick Start Checklist

 Activate your account
 Log in to Vena.io
 Open "Input Data"
 Enter/update data in blue cells
 Click "Save Data to Vena"
 Use drill tools to review your numbers

Training Video

A recording of the original Vena Training video is available HERE. *Please note: content starts at 5:05.*

How to Access Vena

Please note: only Regional Treasurers have access to Vena

Step 1: Log in

- Go to: **Vena.io**
- Use your credentials from the password activation email
- If you didn’t receive access, contact: finance@hbanet.org

Step 2: Land on the Task Pane

Once logged in, you’ll see:

- **Tasks** (what you can work on)
- **Reports** (view-only)

Important: Always access files through Vena (not saved files) to stay connected to the system.

Opening Your Financial Template

1. Click **“Input Data”**
2. Download the Excel file
3. Open it and:
    - Accept the **Vena add-in** (first time only)
    - Select your region (auto-filled for most users)

Good to know:

- No software installation required
- Works on PC, Mac (Excel 365 required), or Linux
- Requires Excel (not Apple Numbers)

Understanding the Template

What you’ll see:

- **Chart of accounts structure** (Revenue, Expenses, etc.)
- Data aligned to **your region/location**
- Columns including:
    - Prior year (if available)
    - Current year actuals (from Sage)
    - Budget
    - Budget remaining

- Reforecast (if applicable)
- Upcoming year budget

Data automatically updates when financial periods close.

How to Enter or Update Data

Where to input

- Only edit **blue cells**

How to input

- Type values directly OR use Excel formulas
- When done, click: **“Save Data to Vena”**

Critical rule:

- If you don’t click “Save Data to Vena,” your updates will NOT be saved
- Formulas save as values (not formulas)

How to Analyze Your Financials

Drill Down (summary → detail)

- Understand what makes up a total number

Drill Transaction (to Sage data)

- View underlying transactions
- See notes/comments tied to entries

This is your primary tool for **investigation and transparency**

Adding More Detail (Recommended for Reforecasting)

Use Line Item Detail

- Found under **Data Input Tools**
- Add sub-line items (e.g., individual events)

Example: Instead of:

- “Event Revenue: $50,000”

You can break into:

- Event A: $15,000
- Event B: $10,000
- Event C: $25,000

This provides clarity and better forecasting and accounting accuracy

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Using the Scratchpad (recommended)

The **Scratchpad** is your working space inside the file.

Use it to:

- Build calculations
- Track assumptions
- Store event planning details
- Keep supporting documentation

NOTES:
- Saved with your template
- External file links will NOT persist

Best practice: Keep all supporting calculations here instead of separate files.

Tracking Changes Over Time

Use “Drill Save”

- View past versions of your data
- See how numbers have changed over time
- Download previous versions of your template

This is useful for:

- Auditing changes
- Reviewing reforecast evolution

Key Usage Tips & Best Practices

Do:

- Always enter through Vena (not saved Excel files)
- Use blue cells only for inputs
- Click **Save Data to Vena frequently**
- Use scratchpad for calculations
- Use line item detail for clarity

Don’t:

- Don’t rely on saving the Excel file alone
- Don’t expect formulas to persist in input cells
- Don’t use external workbook links

Reports and Data Updates

- Data syncs from Sage (HBA Accounting System) **daily**
- Reports can:
  - Be viewed in Vena
  - Be automatically emailed as Excel files

Pro tip: Even without access, reports can still be shared to other leaders as static files. This is helpful to send monthly to chapters, for example, so they can monitor their P&L

Access & Technical Requirements

- Only Regional Treasurers are granted access to Vena.
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- Excel required:
  - Excel 365 OR desktop (post-2010)
- Mac users:
  - Must use latest Office 365 Excel
- Apple Numbers is NOT supported

Support & Help

Issues accessing or operating in Vena? Contact finance@hbanet.org.

In the future, office hours will be launched to provide additional support, but in the meantime, please email for urgent issues. Other planned enhancements include dashboard views for overall P&L and P&L by event, expanded reporting and visibility, and improved variance analysis (e.g. reforecast vs actual). Stay tuned!

Vena Quick Reference Cheat Sheet

For Regional Treasurers.

What is Vena?

Excel-based financial tool connected to Sage that enables you to:

- View actuals, budgets, and forecasts
- Update reforecasts
- Drill into financial details
- Self-serve reports without relying on Finance

Getting Started (2 Steps)

1. Log In

- Go to: **Vena.io**
- Use your activation email and password
- Contact Finance if you do not have access

2. Open Your Template

- Click **“Input Data”**
- Download and open the Excel file
- Accept the Vena add-in (first time only)

Important: Always open files through Vena (not from saved desktop versions)

Template Basics

Section	What It Shows
Rows	Revenue and expense accounts
Columns	Actuals, Budget, Remaining, Reforecast
Blue Cells	Editable input fields only

- Data is pulled directly from Sage and updates automatically
- You will only see your assigned region

Entering Data (Most Important)

How to Update

1. Enter numbers in **blue cells only**

2. Click **Save Data to Vena**

Critical Rules

- Saving the Excel file does NOT save to Vena
- Formulas will save as values (not formulas)

Key Actions You’ll Use

Drill Down / Drill Transaction

- See what makes up a number
- View underlying transactions
- Investigate discrepancies

Add Detail (Recommended)

Use **Line Item Detail** to break out:

- Events
- Revenue sources
- Expense drivers

This improves clarity and forecasting accuracy

Use the Scratchpad

Add supporting calculations and notes:

- Assumptions

- Event planning calculations

- Supporting documentation

- Saves with your file

- External file links will not persist

Track Changes Over Time

Use **Drill Save** to:

- View previous values
- See how forecasts have changed
- Download past versions

Best Practices

Do:

- Always enter through Vena
- Save frequently
- Use scratchpad for calculations
- Use line item detail for clarity

Don’t:

- Don’t work from downloaded files alone
- Don’t rely on formulas in input cells
- Don’t link to external Excel files

System Notes

- Data updates daily from Sage
- Reports can be generated and emailed
- No installation required beyond Excel add-in

Requirements

- Excel required (Office 365 or 2010+)
- Mac users must use latest Excel 365
- Apple Numbers is not supported

Support

Contact: finance@hbanet.org

Quick Workflow

1. Log into Vena
2. Open **Input Data**
3. Update blue cells
4. Click **Save Data to Vena**
5. Use drill tools to review
