

Vena Quick Reference Cheat Sheet

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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)
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Key Actions You'll Use

Drill Down / Drill Transaction

- See what makes up a number
 - View underlying transactions
 - Investigate discrepancies
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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
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Track Changes Over Time

Use **Drill Save** to:

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

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

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