CONTRIBUTOR GUIDE

Vena Cloud Contributor User Guide for Windows

v2.0 (Sep 2018)

Contents

About This Guide

Welcome to Vena: this guide is intended for **anyone who uses Vena in the Contributor role**. If you have been given this guide, that likely includes **you!**

You probably have a few questions, such as:

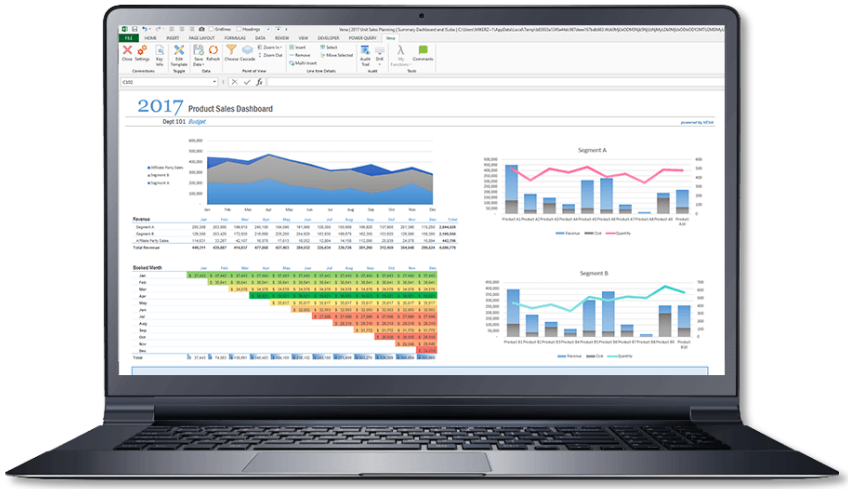
- *What **is** Vena?*
- *What does a Contributor do?*
- *Will this take long?*

This guide will answer those questions and more. It is designed is to teach you **what you need to know** to quickly get up and running as a Contributor in Vena.

Contributors are a diverse group. Depending on your role, **how you use Vena – and how much – can vary quite widely**. As a result, what you need to learn about Vena will fall somewhere between "just the bare minimum" and "everything there is to know".

Regardless of where you are on that spectrum, this guide is for you. It's structured around modules that allow you to read only what you need to get your work done, and each module is designed to be **read in 5 minutes or less**.

To help you navigate the modules, we have set **three recommended paths through this guide based on common use cases**. These provide a good starting point, but of course you can also pick and choose your own path – or simply read this guide all the way through, if you like.



A note on web links

This guide was **designed to be distributed in digital form** (as a PDF file). As a result, it includes a number of **web links** to related materials in Vena's **Knowledge Base.**

If you have been given this guide in a **physical format** (printed), you can still use these links by going to https://venasupport.zendesk.com/hc/ and using search, as the full article title is provided with each link.

Choose Your Path

Below are the **three most common ways that Contributors use Vena**. Read through each description to determine which one most closely matches your own situation, then **follow the indicated path** through the guide.

Alternatively, make your own path by mixing-and-matching modules based on your needs.. It's up to you!

Following your chosen path is easy: just **look for the color-coded dots (• • •) next to the module titles**. If a module title has a dot with your path's color, read it. If it doesn't, feel free to skip it.

Path I: Report Consumer

This is you: You're a decision-maker or analyst, and you're mainly interested in **viewing management/financial reports** (or similar). You're not involved with generating any of the data that is displayed on these reports.

You want to: *Learn how to get the reports you need from Vena, nothing else.*

Follow this path: Read the modules **marked with the orange dot** •

Path II: Data Entry

This is you: You work on tasks that involve **entering data onto spreadsheets**, such as creating budgets and forecasts.

You want to: *Learn how to do your data entry tasks in Vena.*

Follow this path: Read the modules **marked with the purple dot** •

Path III: Reviewer

You need to: Review data entered by other users for accuracy.

This is you: You are responsible for **reviewing data inputs made by others** to ensure that they are error-free and complete.

You want to: *Learn how to download and review data using Vena spreadsheets.*

Follow this path: Read the modules **marked with the green dot** •

Path Matrix

Here is an overview of all of the modules in this guide, and how they correspond to each path:

Guide Module	Path I: **Report Consumer**	Path II: **Data Entry**	Path III: **Reviewer**
Module 1: **A Vena Primer**	● *(optional)*	●	●
Module 2: **Getting Ready to Use Vena**	●	●	●
Module 3: **Vena Web App Basics**	●	●	●
Module 4: **Using the Task List**		●	●
Module 5: **Working on Vena Tasks**	●	●	●
Module 6: **Vena Excel Add-In Basics**		●	●
Module 7: **Working with Vena Spreadsheets**	●	●	●
Module 8: **Entering Data**		●	
Module 9: **Submitting Completed Tasks**		●	
Module 10: **Reviewing Data**			●

Appendices

There are also two appendices at the very end of this guide. These cover additional functionality that is **not essential for most users**, but is **useful to know about** for anyone who wants to get the most out of Vena.

Ready to begin? Then let's get started with a quick intro to Vena.

Module 1: A Vena Primer • • •

Overview

What is Vena? How do I use it? This short primer answers some of the basic questions you might have about Vena.

*This is an **informational module**: it **describes and explains** how Vena works.*

Reading Time

This module will take about **5 minutes** to read (*4 pages*).

Topics

This module covers the following topics:

- What Vena does, and how it works
- What a "Contributor" is
- How you use Vena as a Contributor

Choose Your Path

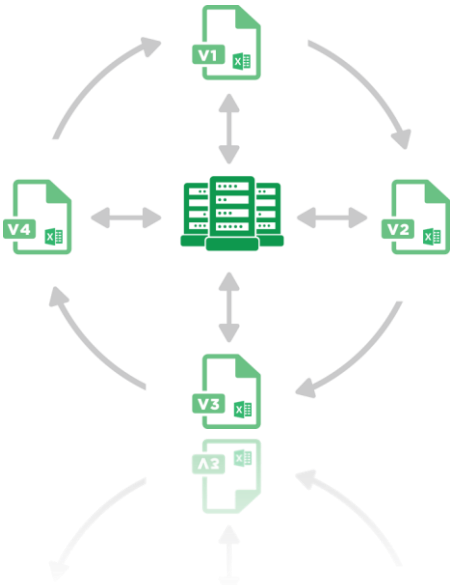
This module is recommended for:

- **Path I:** Report Consumer • *(optional)*
- **Path II:** Data Entry •
- **Path III:** Reviewer •

What does Vena do?

Maybe this sounds familiar: your planning process revolves around **spreadsheets**, and it routinely grinds to a halt when nobody on the team can figure out **which version of the spreadsheet is the most recent one**. Sometimes, there are even several totally different spreadsheets floating around.

We call this situation ***spreadsheet hell***, and it's all too common in many organizations. That's why Vena provides a solution to **eliminate this frustrating phenomenon**, making spreadsheet-driven business processes **easier, faster and just all-around more pleasant** for everyone involved.



How does Vena work?

For most people, the term "spreadsheet" immediately brings one thing to mind: **Excel**[1].

Excel is everywhere. That's great – everyone knows how to use Excel. But because it's so popular, we use it for all kinds of complex processes **for which it wasn't really designed**. And since Excel can't do important things like **version control** or **process management**, this can often lead to chaos and confusion.

The thing is, we know that **you don't want to learn how to use some other tool**: despite its limitations, you'd rather keep using Excel, because you're already familiar with it. We felt the same way, and that's why **Vena's approach is to *embrace Excel* – not replace it.**

Rather than trying to reinvent the wheel, Vena *enhances* Excel by adding the things it lacks: a central **database**, **version control**, **workflow integration**, and a whole suite of useful features for **analysis and collaboration**.

In other words, Vena helps you to **escape *spreadsheet hell***. And you don't even have to give up Excel in the process.

[1] Microsoft, Excel, Word and PowerPoint are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.

Where do I come in?

You will be using Vena as a ***Contributor***. This is one of the handful of different user roles in Vena, each of which revolves around a specific set of activities (some others you will see mentioned are ***Manager***, ***Modeler*** and ***Admin***).

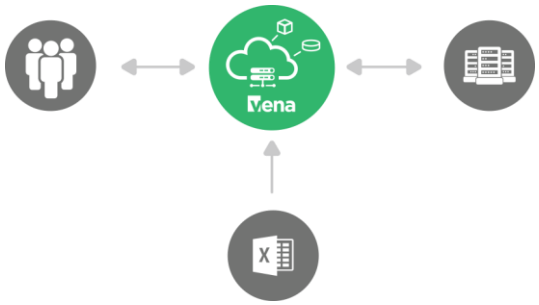
As a *Contributor*, you will use Vena to work on one or more of the following types of **tasks**:

- **Input Tasks**: Doing data entry on spreadsheets (such as budgets or forecasts)
- **Review Tasks**: Checking data inputs made by other users
- **Report Tasks**: Consuming financial or other types of reports created using Vena data

When you're assigned to a task, you are also given one of three levels of responsibility: the **Owner** is responsible for the task's completion and signing off on it; a **Support Worker** helps an Owner to complete a task; and a **Watcher** is a stakeholder who monitors a task but is not directly involved with working on it.

Because Vena builds on Excel, using it should feel pretty familiar: with Vena, you'll still use **Excel spreadsheets** to do things like enter your budget numbers, just as you have always done.

However, with Vena, those spreadsheets are now **connected to an online database**. That means that any data you enter into a Vena spreadsheet is saved **to the database**, not in the Excel file itself. Whenever you open a Vena spreadsheet, it will automatically pull the latest data for that spreadsheet directly from the database. This ensures that **everyone *automatically* has the latest version of that spreadsheet**, every time.



Vena also **distributes the spreadsheets you need to complete your tasks**, so you no longer have to dig through email chains to find them. Instead, a **web-based interface** will show you only those files that are relevant to you, in a clear **task-list format**. Just open any task to download its associated spreadsheets, along with instructions on what you need to do.

It's not just spreadsheets

You're most likely to use Excel spreadsheets with Vena, but other types of files, including **Word** documents and even **PowerPoint** presentations, can be used with Vena too.

And if you're responsible for **reviewing work others have done**, you'll also do that directly in Vena. Your **workflows** are built right into the interface, so if you're looking over the numbers and notice an error, you can just kick the spreadsheet straight back to the person responsible with a single click.

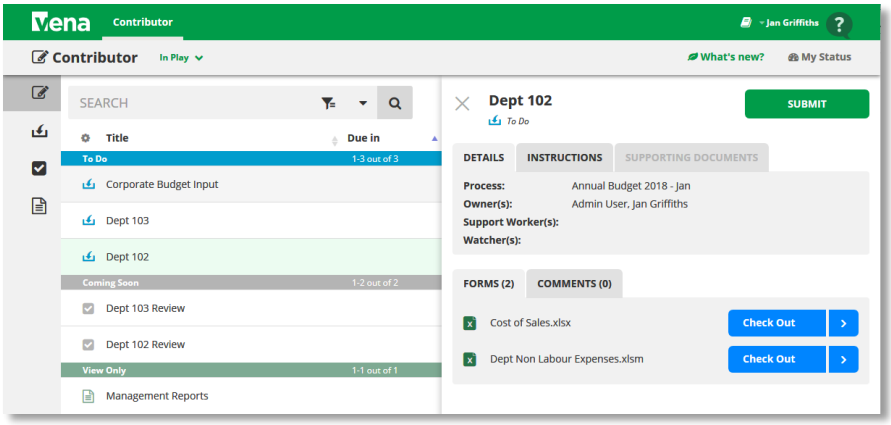
How do I use Vena?

Let's start with a high-level look at how you'll actually use Vena in practice. Vena consists of two main parts: a ***web app*** and an ***Excel Add-In***.

The Vena web app

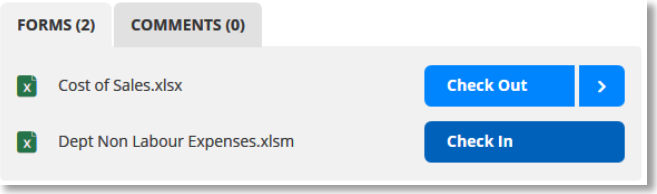
The ***Vena web app*** is where your business processes are tracked and managed. Think of it as **a hub where you can see the Vena tasks you need to work on**.

These tasks are presented as a to-do list, and clicking on any task allows you to see details about it (including instructions, comments left on the task by other users, etc.).



Each task contains **task forms**. These are the files you'll use to complete the task. When talking about task forms, we also sometimes use the more specific terms **input template**, which is **a spreadsheet that accepts data inputs**, and **report**, which is **a read-only spreadsheet** that displays data, but can't be used to change that data.

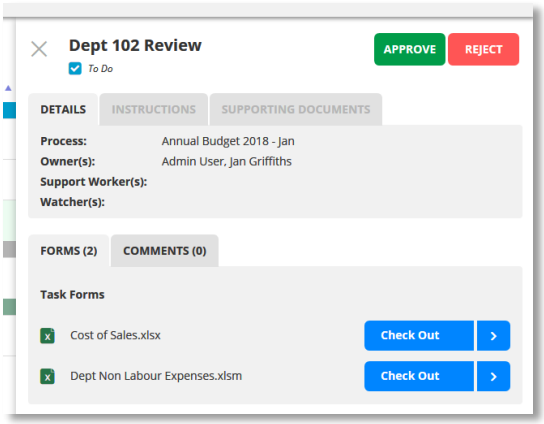
Because you will often be using the same spreadsheets as other users when you input data, it's important to **avoid data conflicts**. That's why you **check out** a task form whenever you download it to make inputs.



This is similar to checking out a book from the library: **while the task form is checked out in your name, only *you* can use it**. And like a library book, you **check in** the task form when you're done with it, which makes it available to others again.

Finally, when you have finished a task, you complete it by **submitting it**.

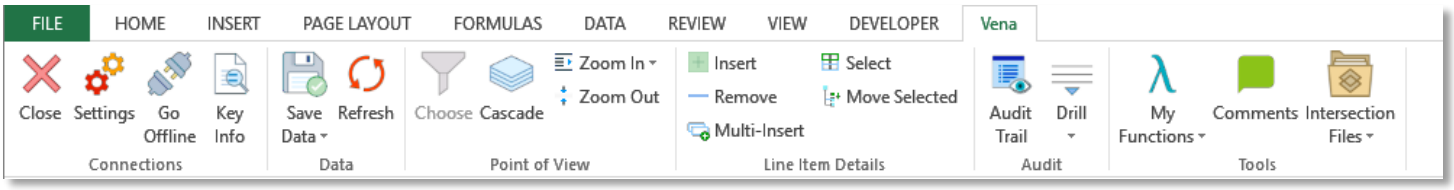
Submitting a task usually creates a corresponding **review task** (for another Contributor to check your work) and you yourself may also perform reviews. Just as with input tasks, this involves **downloading task forms to review the data on them**. Depending on how the review goes, you can then choose to accept or reject the task right in the Vena web app.



The Vena Excel Add-In

When you download a spreadsheet from Vena, it'll open in Excel – just like you'd expect. But unlike normal spreadsheets, the ones you download from Vena are **connected to your Vena database**.

To make this happen, we use an **Excel Add-In**, which is an app that **plugs in to Excel** to extend its functionality. In Vena's case, it looks like an extra tab in the menu ribbon at the top of Excel. This tab is automatically displayed whenever you open a Vena file:



The main purpose of the **Vena Add-In** is to essentially turn Excel into powerful database software while **still looking and working like Excel**. This makes learning how to use Vena easy, because you can build on **the Excel expertise that you already have**.

We'll show you how to use all the important features of the Add-In in a later module. For now, here's a brief rundown of some of the things it allows you to do in Excel:

- **Write data inputs to the database:** Enter data into designated input fields on a Vena-enabled spreadsheet, then save it back to the database with one click.
- **Refresh data:** At any time, get the most up-to-date data from your database on the spreadsheet you're currently using.
- **Switch between different datasets**: View related datasets (like prior year actuals vs. this year's budget) without having to open another spreadsheet. Plus, view different datasets side-by-side for comparison.
- **Add more detail to line items**: Need to give a detailed breakdown of a budget figure? Break it down to provide more granular information.
- **Additional features**: Leave comments for other users, see a history of changes on a file, drill into historical and transactional data, and upload/download files to and from your database.

What's next?

Now that you know what Vena is and how it works, let's get started! Over the course of the next few modules, we'll **make sure you have everything you need**, then look at **how to use the Vena web app and Add-In for Excel**.

What to do if you need help

We've done our best to include **everything you need to know** as a Contributor in this guide. But even so, it's always possible that **you might run into something we didn't cover**.

If you get stuck at any point and can't find the answer in this guide, don't worry! Your **best resource** for help is usually your organization's **Vena Power Users** (who probably gave you this guide). Get in touch with them, and they should be able to help you out of most jams.

Module 2: Getting Ready to Use Vena • • •

Overview

Ready to begin using Vena? Learn about **what you'll need to get started**.

*This is an **instructional module**: it contains a guide on **how to perform a task or action** in Vena.*

Reading Time

This module will take about **2 minutes** to read (3 *pages*).

Topics

This module covers the following topics:

- Requirements for using Vena
- How to log in

Choose Your Path

This module is recommended for:

- **Path I:** Report Consumer •
- **Path II:** Data Entry •
- **Path III:** Reviewer •

What You'll Need

→ Your Vena login credentials

This is the email address and password combination you use to log in to Vena. The email is **usually the same as your work email**, and a **temporary password** should have been provided to you. If you're not sure about your login details, check with your organization's *Vena Power User*, or your IT department.

→ A major browser

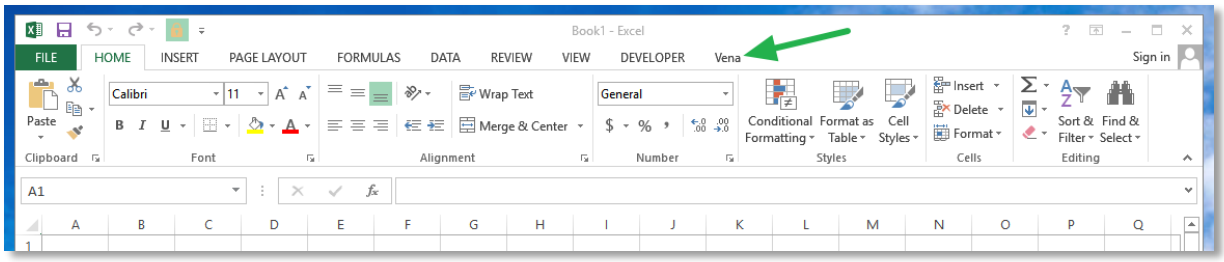
To use the Vena web app, you'll need **a major browser** like *Google Chrome* (recommended), *Mozilla Firefox* or *Microsoft Edge/Internet Explorer*. Ideally, you should be running the latest version of your chosen browser. If you use *Internet Explorer*, it must be at least version 10 or later.

→ Microsoft Excel

Of course, you'll need Excel. Vena will work with ***Excel 2010* at minimum**, but we recommend using at least ***Excel 2013* or later.**

→ The Vena Add-In for Excel

Usually, **your IT department should have already installed this** on your computer. It's easy to check if the Vena Add-In is already installed. Just open up Excel (any file or even a blank new workbook will do), and take a look at the menu bar:



If you see a *Vena* tab in the menu bar (like in the image above), you have the Add-In. Don't worry that there isn't much on it right now – once you've opened a Vena-connected file, the full menu will be visible.

Don't see the Vena tab in Excel?

The **Add-In might not be installed**, or perhaps something went wrong during installation and it needs to be reinstalled.

Because many organizations don't permit individual employees to install software by themselves, this guide does not include installation instructions for the Vena Add-In. Instead, **we recommend that you contact your IT department for help** if you do not have the Vena Add-In on your computer, or if it's not working.

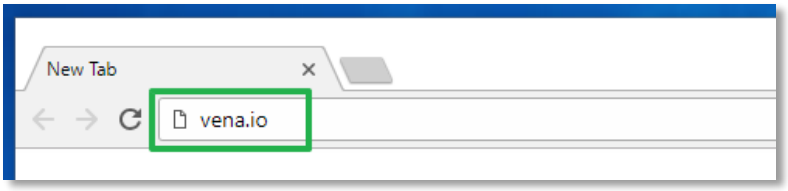
Got everything? Then **let's log in to Vena.**

Logging In

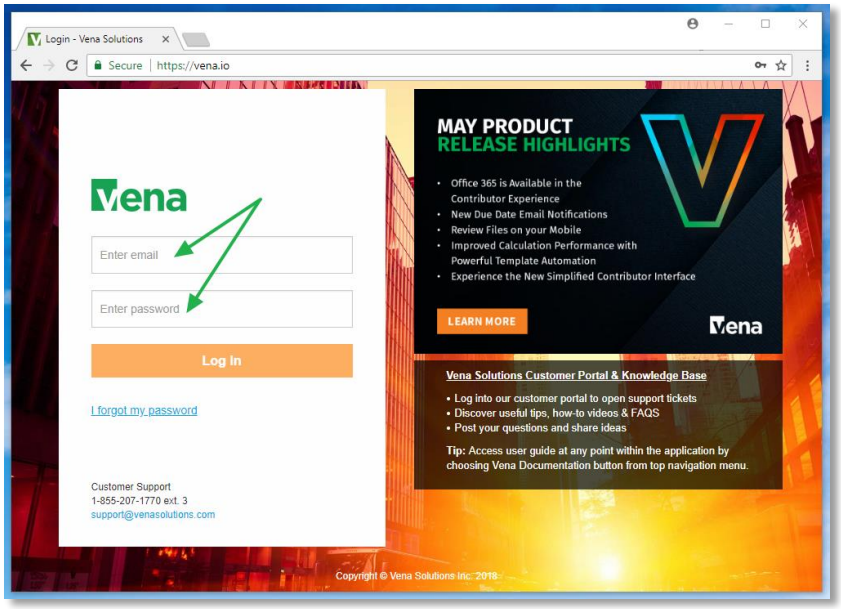
Whenever we talk about "logging in to Vena", this means **logging in to the Vena web app** on the *vena.io* website. The web app is the **starting point for everything you do in Vena** (even the parts for which you'll use Excel).

How to log in to Vena:

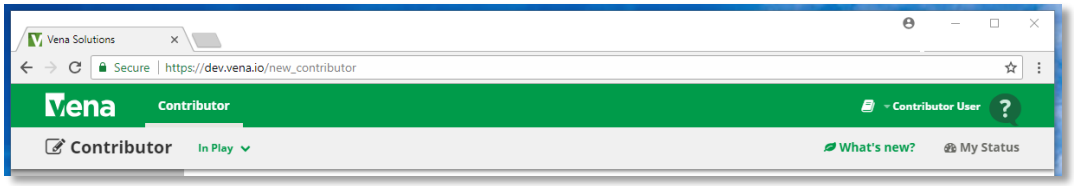
1. Open up your **browser** (we recommend *Google Chrome*) and type ***vena.io*** into the address bar. Press *Enter*.



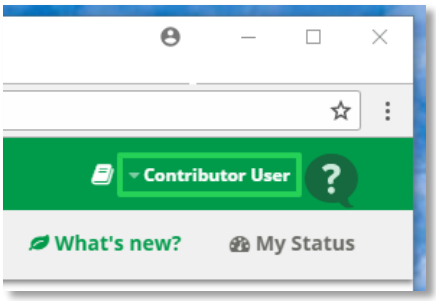
2. This will bring up the Vena login page. Use the fields provided to type in your Vena login credentials: your **email address** and **password**:



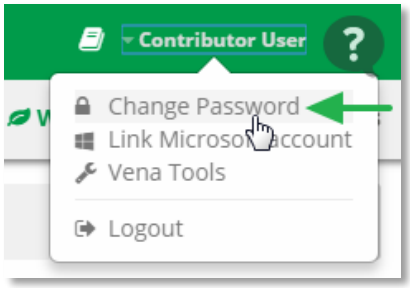
3. Now, click on the *Log In* button. If you entered your credentials correctly, you should see the **Vena Contributor interface**, indicating that you have logged in successfully:



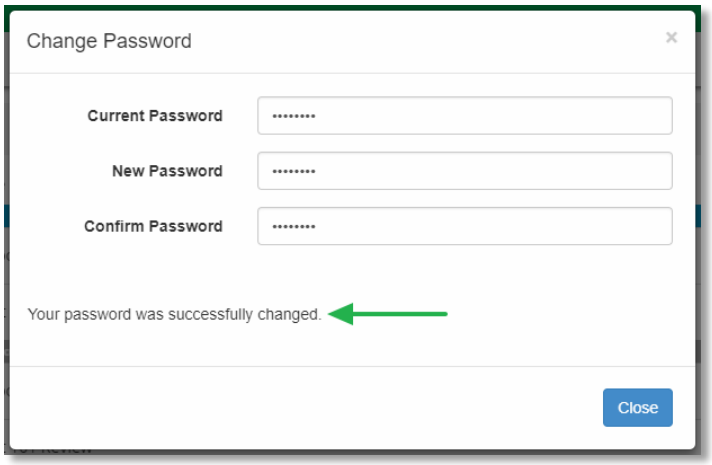
4. If this is your first time logging in to Vena, you likely used a **temporary password**. If that's the case, the first thing you should do is change your password. To do that, click on your name in the top right corner:



5. This will open the *User* menu. Here, click on ***Change Password***:



6. Use the *Change Password* menu that appears to **type in your current (temporary) password, as well as the new password you want to use (twice)**. Click on *OK* when you're done, and you'll see a confirmation that the password was changed successfully:



7. You're all set, and can now begin **using the Vena web app to work on your tasks**.

Module 3: Vena Web App Basics • • •

Overview

A high-level look at the **Vena web app's interface for Contributors**, which you will use to manage and work on your Vena tasks.

*This is an **informational module**: it **describes and explains** how Vena works.*

Reading Time

This module will take about **2 minutes** to read (*1.5 pages*).

Topics

This module covers the following topics:

- The overall structure of the web app's Contributor Interface
- What each part of the interface does

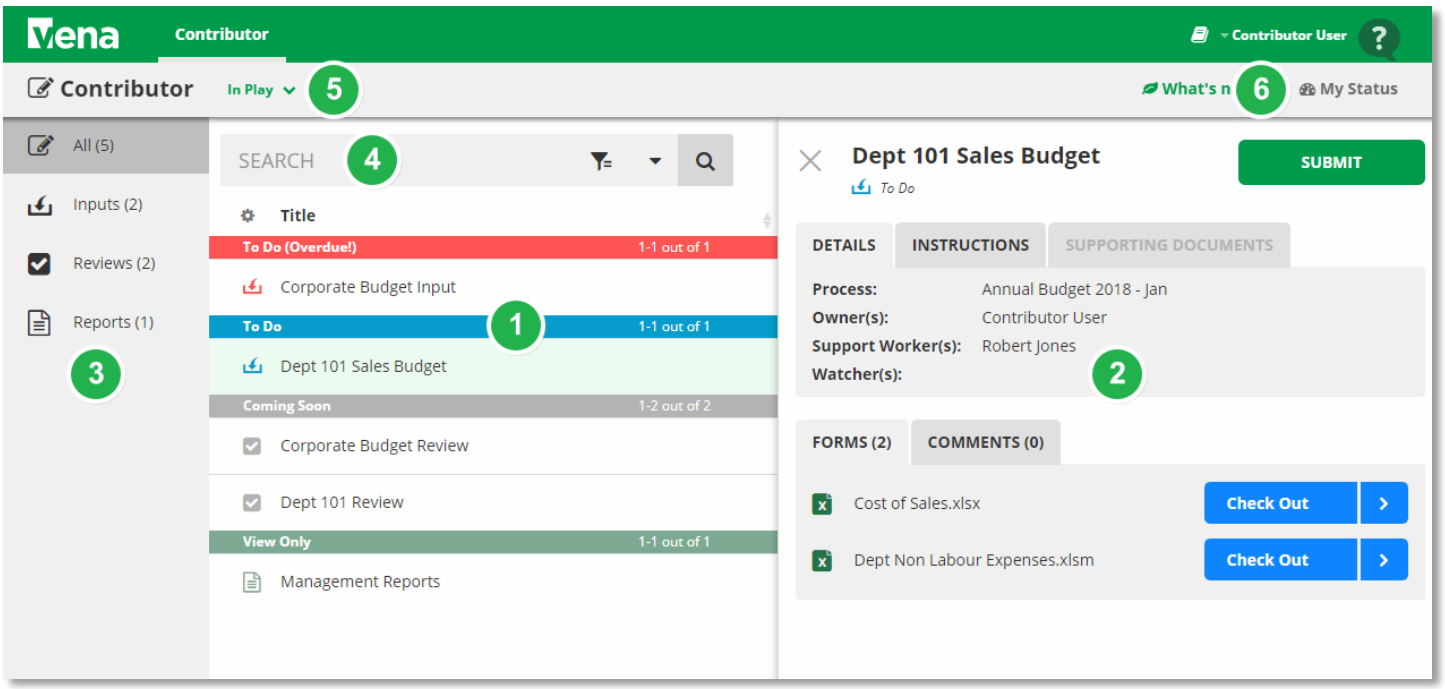
Choose Your Path

This module is recommended for:

- **Path I:** Report Consumer •
- **Path II:** Data Entry •
- **Path III:** Reviewer •

A Look at the Vena Contributor Interface

Welcome to the **Contributor Interface** of the Vena web app! Whenever you log in to Vena, it's the first thing you'll see. Your Contributor Interface should look something like this:



The Contributor Interface displays your Vena **tasks**, and makes available all of the **task forms** (i.e. spreadsheets) that you'll use to work on those tasks.

It has **six main parts**, as you can see numbered in the screenshot above. These are:

1. **Task List:** The focal point of the Contributor Interface, a **listing of all of your tasks**, categorized and sorted based on their due date.

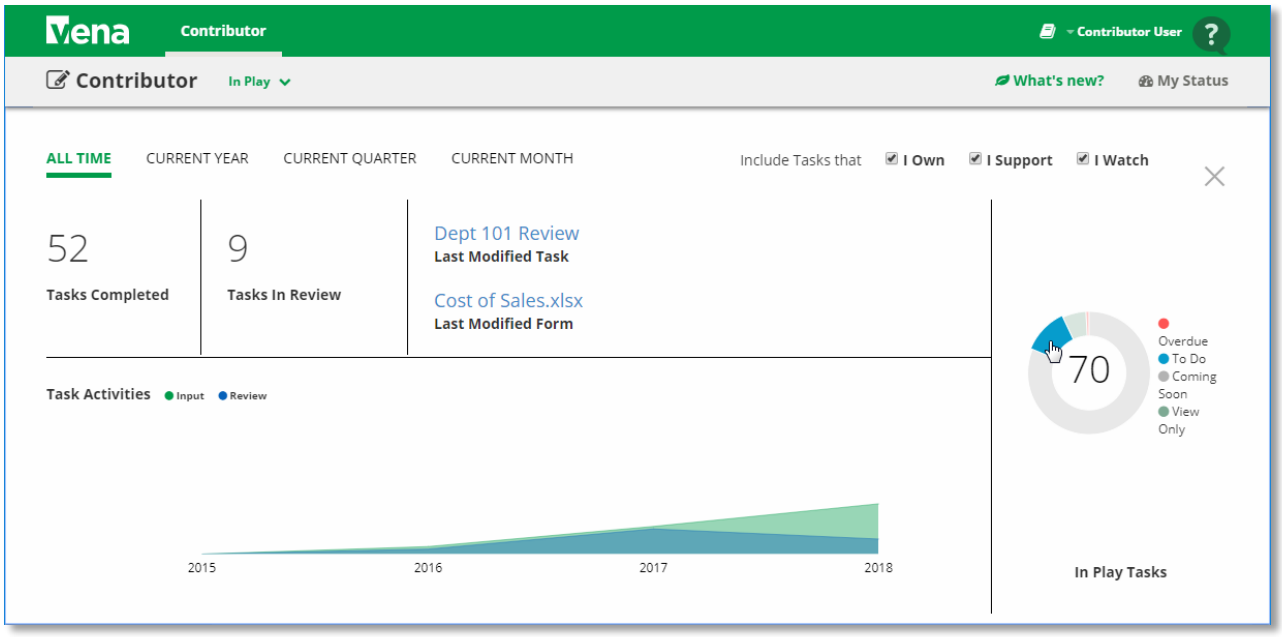
2. **Task Drawer:** Opens when you click on any task to **display more information** about it. Contains all the details about a task, including **download links for task forms, instructions, supporting documents, etc**. as well as **task-specific actions** like submitting tasks or approving/rejecting reviews.

3. **Task Type Filters: Narrow down the Task List** by hiding all tasks except those of a specific type, i.e. view only tasks that relate to inputs, reviews or reports.

4. **Task Search & Advanced Filters:** Use keywords to **search** for specific tasks, or set **advanced filters** to narrow the Task List by specific processes, task categories, due date, etc.

5. **Process Status Filter:** Instead of just active tasks, **choose to view other categories of tasks**, such as those that belong to processes which are currently inactive (completed or paused), haven't started yet, or even all tasks that have ever been assigned to you, past, present, and future.

6. **My Status button:** View **a dashboard with a high-level overview of your Vena tasks**. Displays statistics around your number of tasks, when you worked on them, comparison of tasks by type, which one you last worked on, etc.



Module 4: Using the Task List • •

Overview

The web app's Contributor Interface revolves around the **Task List**. Learn **how it works** – and how to make it work for you.

*This is an **instructional module**: it contains a guide on **how to perform a task or action** in Vena.*

Reading Time

This module will take about **5 minutes** to read (3 *pages*).

Topics

This module covers the following topics:

- Navigating your Task List
- Managing tasks, including sorting and viewing them
- Filtering and searching the Task List

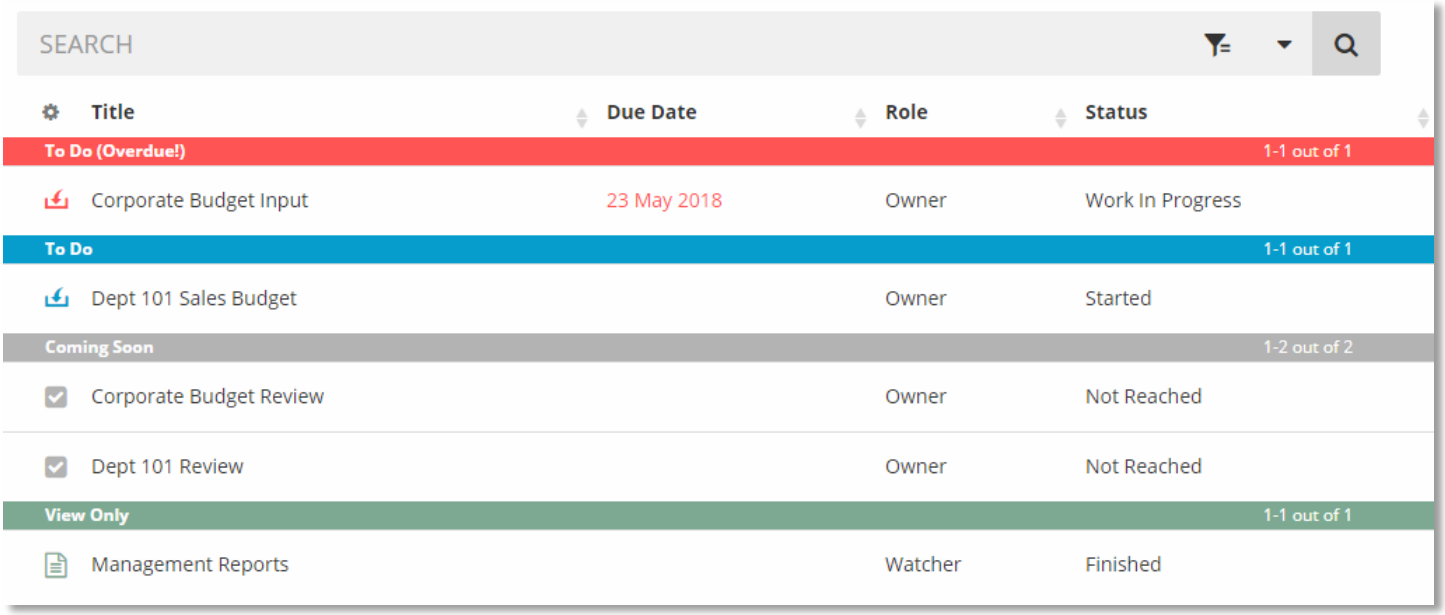
Choose Your Path

This module is recommended for:

- **Path II:** Data Entry •
- **Path III:** Reviewer •

Managing Your Tasks

In the Contributor Interface, everything revolves around your Task List. By default it shows all your **active** tasks, along with some further information about the task such as when it's due. It will look something like this:



How to read and manage the Task List:

Task Categories

Your tasks are divided into **Task Categories** based on **urgency**. Each category has its own color-coded header:

- **To Do (Overdue)**: Currently available tasks whose **due date has already passed**.

  To Do (Overdue!)

- **To Do:** Current tasks that are ready for you to work on, and whose **due date is still in the future**.

  To Do

- **Coming Soon:** Tasks that are **upcoming, but not yet ready** because they haven't been reached in your process yet.

  Coming Soon

- **View Only:** Tasks (often reports) that **don't require any action on your part**, and are available to view at any time.

  View Only

Task Types

Next to each task, you'll see an icon indicating what type of task it is:

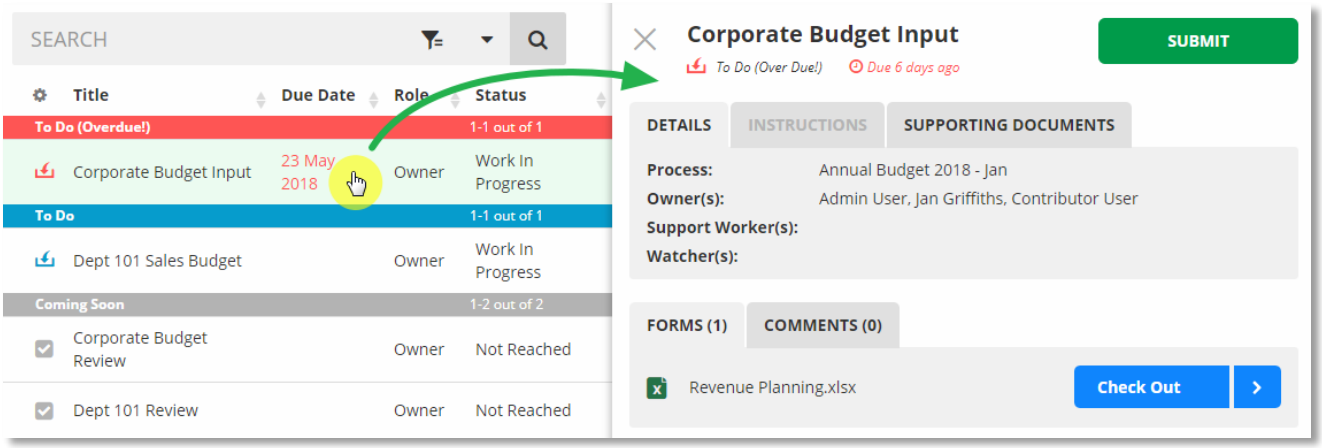
- **Input:** Enter data on a spreadsheet.
- **Review:** Check inputs made by other Contributors for accuracy.
- **Report:** View financial and other types of reports.

Sorting the Task List

You can choose to **sort the task list** by any of the columns in ascending or descending order. To do that, just **click on the arrows next to each column header**.

Viewing a Task

To view any particular task, just **click on it**. The **Task Drawer** will slide in from the right to display that task's details:



You can **quickly switch between tasks** in your list using the ↑ **and** ↓ **keys** on your keyboard. Use the ***Esc key to* close the Task Drawer**.

Who does my Task List look different?

The **columns** you see in your Task List **might not be the same** as the ones shown in these screenshots. That's because your Vena Manager has the option to **customize them**. You can too! Find out how in **Appendix A** at the end of this guide.

Filtering & Searching Your Task List

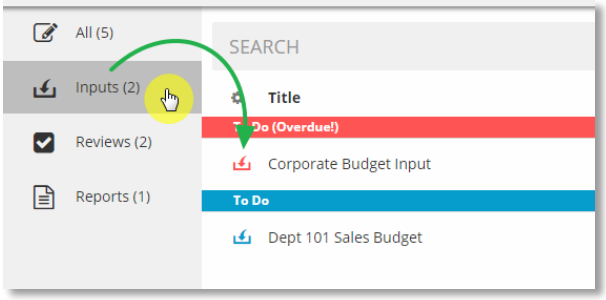
Making your Task List work for you is key, and there are a few ways you can **find things more quickly**, including **customizing which tasks appear in the list**.

How to filter and search the Task List:

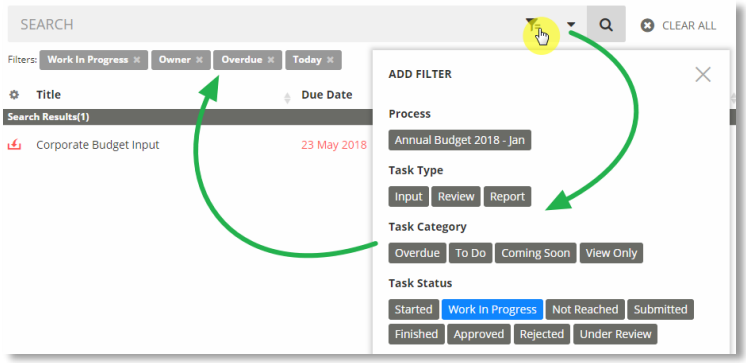
Filtering by Task Type

Want to **only see tasks of a specific type**, and nothing else? Use the **Task Type Filter** in the sidebar on the left.

Just click on the type of task you want to see, and all tasks that aren't of the selected type will be hidden. To see all types of tasks again, click on the ***All*** option.



Advanced Filtering



For more granular filtering, use the **Advanced Filters**. These allow you to customize your Task List based on any piece of task metadata (information about the task itself, such as status, due date, etc.).

Click on an item to add it to your **current filters**, which are displayed under the search box. You can set as many filters as you want, in any combination. Remove a previously set filter by clicking on the *x* next to it, in the list, or use the *Clear All* option next to the search box to remove all current filters.

Searching

To search for tasks matching one or more **keywords**, just start typing into the **search box**. The search function will auto-suggest **tasks**, **processes** (the major business processes that your tasks are part of, like *Annual Budgeting*) or **activities** (sub-sections of processes, like *Marketing Budget*).

Select one of the auto-suggested results (with your mouse), or **hit the *Enter* key to list all results**. As with the Advanced Filters, hitting *Clear All* will clear your search results and return you to the default view.

Module 5: Working on Vena Tasks • • •

Overview

Learn how to **download files from Vena** to work on your tasks, such as viewing reports, doing data entry, or performing reviews.

*This is an **instructional module**: it contains a guide on **how to perform a task or action** in Vena.*

Reading Time

This module will take about **5 minutes** to read (*3 pages*).

Topics

This module covers the following topics:

- Opening and viewing a task and its details
- Checking out task forms
- Downloading task forms

Choose Your Path

This module is recommended for:

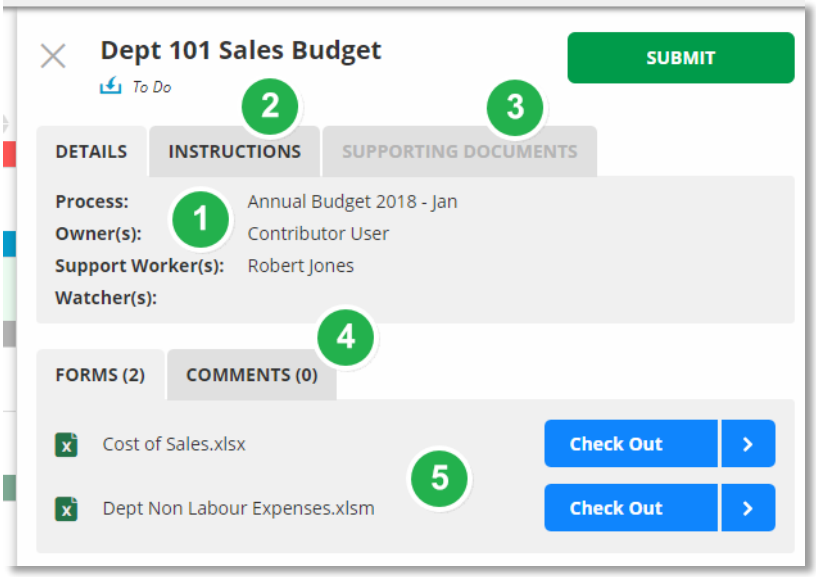
- **Path I:** Report Consumer •
- **Path II:** Data Entry •
- **Path III:** Reviewer •

Opening a Task

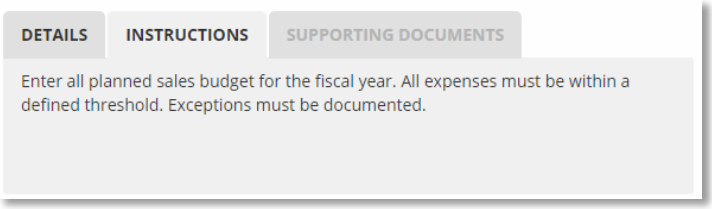
In Vena, the files you use to work on your tasks are called **task forms**. To access the files you need, the first step is to **open the task** it's attached to. Here, you'll also find **more information about the task** itself.

How to open a task:

1. To get started on a task, **click on the task** to open the Task Drawer:



2. In the top half, the ***Details* tab** will be shown by default. Here you'll find basic information about the task, such as who is assigned to work on it, and what their level of responsibility is (*Owner*, *Support Worker* or *Watcher*).
3. Next, click on the ***Instructions* tab** to find out what you need to do to complete the task:



4. If the task has any additional reference material, you can usually find it on the ***Supporting Documents* tab.** You can also check out the ***Comments* tab** in the lower half of the Task Drawer, where you can discuss the task with other Contributors assigned to it.
5. Now, go to the ***Forms* tab** (also in the lower half). It lists the files (task forms) that you'll use to complete this task. We'll look at how to download task forms in the next section.

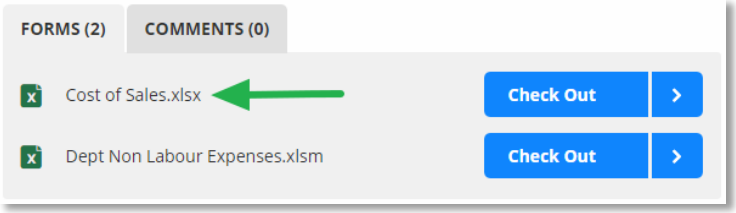
Downloading Task Forms

To work on a task, you will need to **download and open its task forms in Excel**.

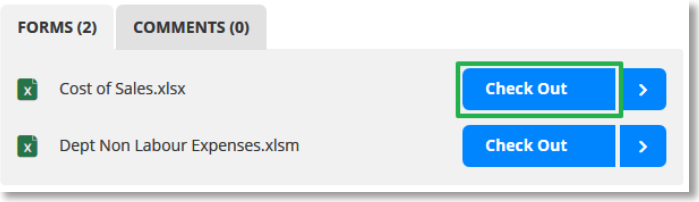
- Any task form that **can be used for data entry** must be **checked out** before you can download it. Checking out a task form means that **only you can work on it**, which **prevents conflicting inputs**. When you check out a task form, it will **start downloading automatically**.
- Task forms that **can't be used for data entry** are **view-only**. This means that they **do not need to be checked out**, and you can just download (or "view") them directly. **Reports** are always view-only.

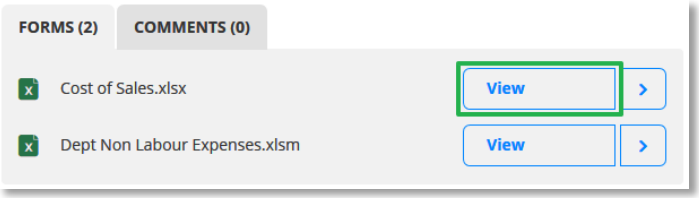
How to download a task form:

1. In the ***Forms* section** of the Task Drawer, choose the task form you want to work on.



2. To the right of the task form, find its ***Check Out/View* button**: the button should consist of two parts, a main section with a *Check Out* or *View* label, and a smaller section with an arrow (>). Click on the **main section** of the button:



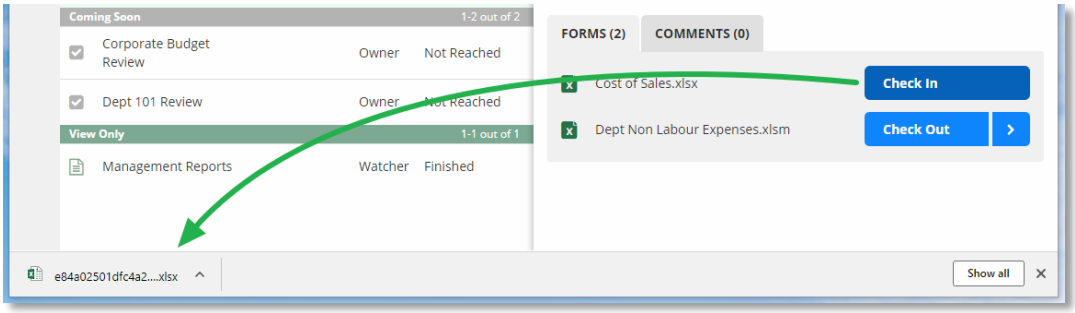


What about the arrow (>) button?

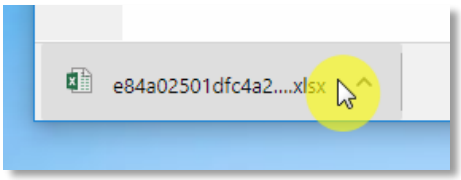
The **main part** of the *Check Out/View* buttons immediately downloads the task form, so it's the **preferred option for most users.**

Clicking on the arrow (>) section of the button shows you additional options that aren't necessary for the majority of users. If you want to learn more, take a look at **Appendix A** at the end of this guide.

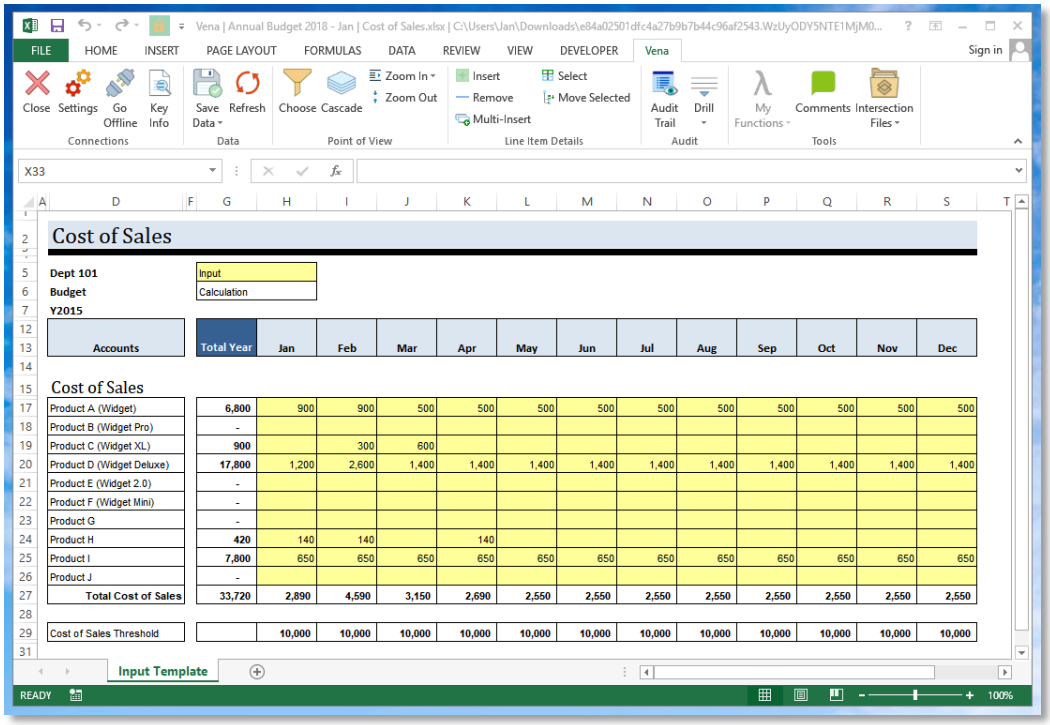
3. The task form will now **automatically begin to download**.



4. Once the download is finished (which should only take a few seconds), **click on the downloaded file** to open the task form in Excel.



5. Excel will open, and you should also see a Vena loading bar. Once everything has finished loading, the contents of the task form will be displayed, and **the Vena Add-In menu ribbon will be visible** at the top of the Excel window.



6. Your task form is now checked out and open in Excel, so y**ou can begin working on it**. To do that, you'll use the **Vena Excel Add-In**.

Module 6: Vena Excel Add-In Basics • •

Overview

A quick tour of the **Vena Excel Add-In**, which allows Vena to integrate with Excel, and enables Vena-specific functionality on your task forms.

*This is an **informational module**: it **describes and explains** how Vena works.*

Reading Time

This module will take about **2 minutes** to read (*1 page*).

Topics

This module covers the following topics:

- The overall structure of the Vena Excel Add-In interface for Contributors
- Available functions, and what they are used for

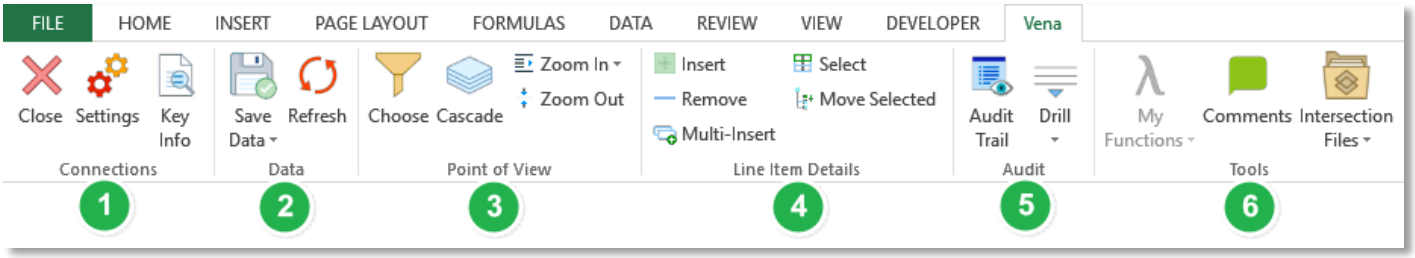
Choose Your Path

This module is recommended for:

- **Path II:** Data Entry •
- **Path III:** Reviewer •

A Look at the Vena Excel Add-In

When you open a Vena task form in Excel, the Add-In will appear in the Excel menu ribbon automatically. It looks like this:



This is the Add-In's **menu ribbon**, and it works essentially like any other Excel menu. It consists of **six sections**, each of which contains a number of related features and functions. These are:

1. **Connections:** Contains the ***Close***, ***Settings*** and ***Key Info*** functions, which allow you to close and disconnect the Vena Add-In (*Close*), configure Add-In options (*Settings*) and view database-specific details for certain cells on the spreadsheet (*Key Info*).

2. **Data:** Contains the ***Save Data*** and ***Refresh*** functions. These are used to save data inputs that you make on the spreadsheet (*Save Data*) as well as repopulate the spreadsheet with the most up-to-date data from the database (*Refresh*).

3. **Point of View:** Contains the ***Choose*** and ***Cascade*** functions, which are used on spreadsheets configured with multiple, switchable datasets to either swap between them (*Choose*) or view multiple datasets in separate worksheets (*Cascade*). Also contains the ***Zoom In*** and ***Zoom Out*** functions, which don't actually zoom in and out on the spreadsheet, but rather are used with some types of data tables to see more or less granular data.

4. **Line Item Details**: Contains functions related to the ***Line Item Details*** feature, which allows you to create detailed breakdowns of line items in some tables (for example, the details of a larger expense item). See **Appendix B** for more information.

5. **Audit:** Contains the ***Audit Trail*** and ***Drill*** functions. Use the *Audit Trail* to see a history of changes made using this spreadsheet. *Drill* consists of three related functions that allow you to drill down into data to get more detail: see a history of data values saved to any data cell on the spreadsheet (*Drill Saves*); the transactional data underlying a value, if available (*Drill Transactions*); and more granular data, if available (*Drill Down*), for example by drilling from an overall *Q2* figure to separate *April*, *May* and *June* numbers.

6. **Tools:** Contains the ***My Functions***, ***Comments***, and ***Intersection Files*** functions. These allow you to use custom macros, if available (*My Functions*), leave comments on specific database intersections (*Comments*) or even upload files to Vena database intersections (*Intersection Files*).

Module 7: Working with Vena Spreadsheets

Overview

Learn how to get around a Vena spreadsheet by using **the essential functions built into the Vena Add-In** for Excel.

*This is an **instructional module**: it contains a guide on **how to perform a task or action** in Vena.*

Reading Time

This module will take about **5 minutes** to read (2 *pages*).

Topics

This module covers the following topics:

- The essential Add-In functions for Contributors (Refresh and Choose)
- Optional Add-In functionality

Choose Your Path

This module is recommended for:

- **Path I:** Report Consumer
- **Path II:** Data Entry
- **Path III:** Reviewer

Working with Vena Spreadsheets

Whether you use Vena spreadsheets to do data entry, data review, or simply to look at reports, the good news is that the experience is **almost exactly the same as using a normal spreadsheet**. All of the **normal Excel functionality** that you're used to is there, and works just as you expect.

Of course, a Vena spreadsheet opens up with the **Vena Add-In menu** active, and this offers **additional functionality** that's not available on a traditional spreadsheet.

Essential Add-In Functions

For all types of Vena users, the two most important functions in the Vena Add-In menu are **Choose** and **Refresh**. With these functions, you can:

- Switch between **different datasets on the same spreadsheet** (*Choose*)
- Get the **latest available data** *(Refresh)*

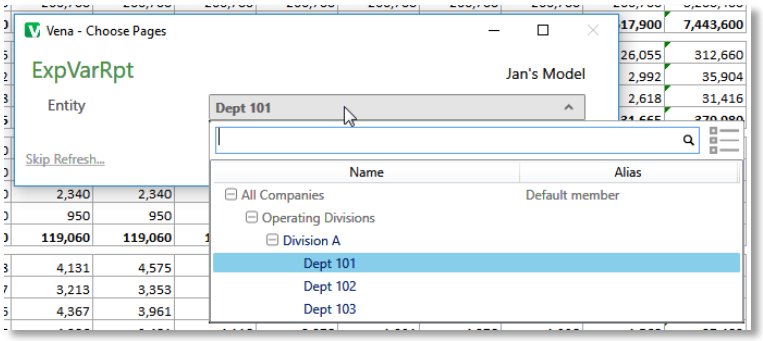
How to use Choose and Refresh:

Using *Choose*

There are all kinds of situations where you might want to see a version of the **same spreadsheet with different numbers**. For example, you might want to view the same report, but with last year's figures for comparison.

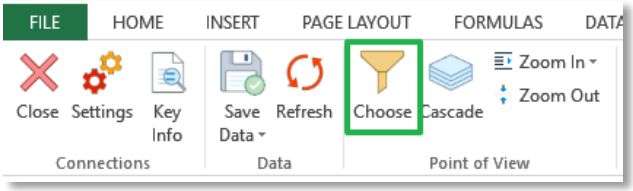
In Vena, a single spreadsheet can be configured to display **multiple sets of data**, which we refer to as **page options**. On spreadsheets where **page options** are available, the ***Choose* function** allows you to select between them.

In fact, **the *Choose* menu is the first thing you'll see** when you download **any spreadsheet that has page options:**



All you have to do is **use the dropdown menu(s) to choose the page option(s)** you want to view, then **click on *OK***. There will be a separate dropdown menu for each dimension (or "category" of data) you can choose from.

Want to **switch to a different set of page options** later? Just **click on the *Choose* button** in the Vena menu ribbon at any time to open up the page options menu again:



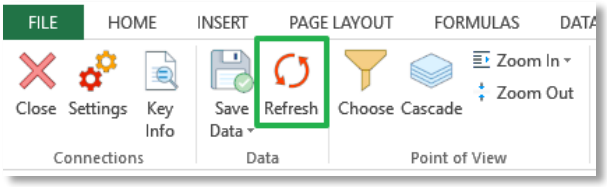
Why is the *Choose* button not working?

The *Choose* button in the Vena menu **will only be active if the designer of the spreadsheet has set up different page options** for you to choose from.

If you can only view one dataset on the spreadsheet you're currently using, the *Choose* button will be disabled (greyed out).

Using *Refresh*

To make sure you're looking at the most recent data, just **press the *Refresh* button** in the Vena menu ribbon at any time.



Vena will check with your database to see if there have been any changes, and will **update the spreadsheet** accordingly.

Other Important Add-In Functions

In addition to the essential functions we've looked at above, you can get even more from your Vena spreadsheets by using the optional **Cascade**, **Audit Trail**, and **Drill** functions. With these functions, you can:

- **View multiple page options side-by-side** on different tabs (or in separate files) to rapidly and repeatedly switch between them (*Cascade*)
- See a **history of changes made to the spreadsheet, and view and compare historical versions** of that spreadsheet (*Audit Trail*)
- **Extract related, contextual data that is *not* on the spreadsheet** from your Vena database (*Drill*)

For comprehensive information about each of these features, including what they do and how to use them, please **refer to their articles on our Knowledge Base** at https://venasupport.zendesk.com/hc/en-us/:

- How-To: Viewing multiple datasets at the same time with Cascade
- How-To: Tracking template revisions with the Audit Trail and Files Audit
- How-to: Using the Add-In's Drill functions to uncover further insights into your data

Module 8: Entering Data •

Overview

If you've been assigned a task that requires you to input data, learn **how to do data entry** on Vena spreadsheets.

*This is an **instructional module**: it contains a guide on **how to perform a task or action** in Vena.*

Reading Time

This module will take about **4 minutes** to read (2 *pages*).

Topics

This module covers the following topics:

- Using a Vena spreadsheet for data inputs
- Saving your inputs to the Vena database

Choose Your Path

This module is recommended for:

- **Path II:** Data Entry •

Making & Saving Data Inputs

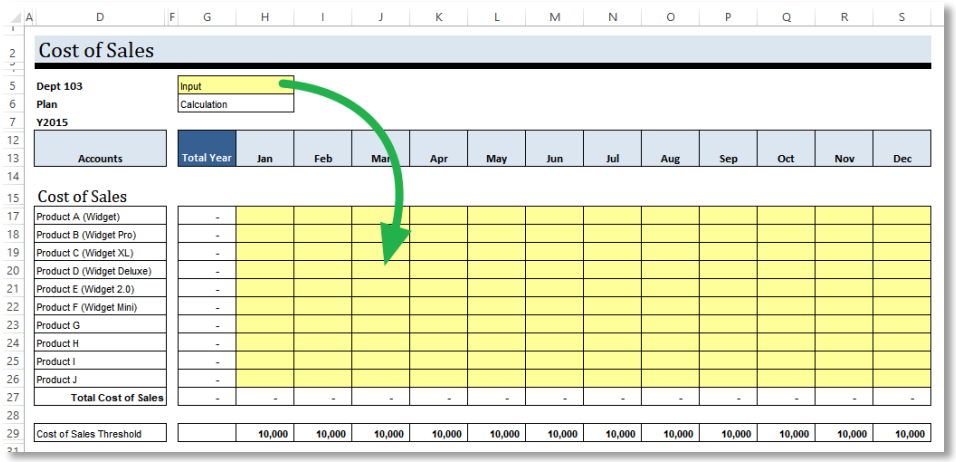
Using a Vena task form to do data entry is easy: after you check out and open it in Excel, you simply **type your numbers into the appropriate cells**, then **save the data** – just like on a normal spreadsheet. (When they are used for data entry, we also use the term **input template** to describe these task forms.)

However, there is a **small but important difference** between Vena spreadsheets and normal ones: on a Vena input template, **the Excel *Save* button won't save your data inputs**!

Remember: in Vena, your spreadsheets are **connected to a database**. When you save data on a Vena spreadsheet, you're actually **saving that data directly to the database**. To do this, you'll need to use Vena's ***Save Data* function**, which is built into the Vena Add-In.

How to make and save data inputs on a Vena spreadsheet:

1. With the spreadsheet open in Excel, **find the cells where you are supposed to make inputs**. The designer of the spreadsheet will often highlight them in some way. In the screenshot below, for example, the input cells are highlighted in yellow:

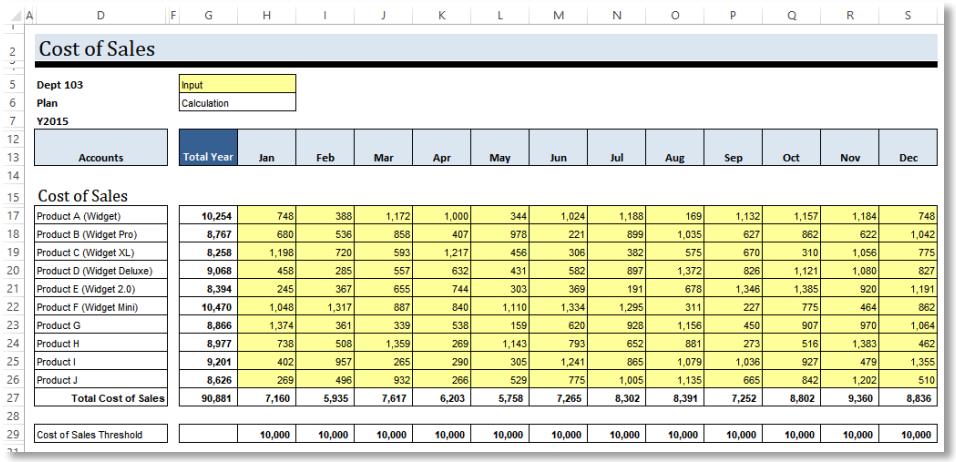


Cost of Sales

Dept 103	Input
Plan	Calculation
Y2015	

Accounts	Total Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Cost of Sales													
Product A (Widget)	-												
Product B (Widget Pro)	-												
Product C (Widget XL)	-												
Product D (Widget Deluxe)	-												
Product E (Widget 2.0)	-												
Product F (Widget Mini)	-												
Product G	-												
Product H	-												
Product I	-												
Product J	-												
Total Cost of Sales	-	-	-	-	-	-	-	-	-	-	-	-	-
Cost of Sales Threshold		10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000

2. Now, just **type your data inputs into these cells**, just like you would on any other Excel spreadsheet:

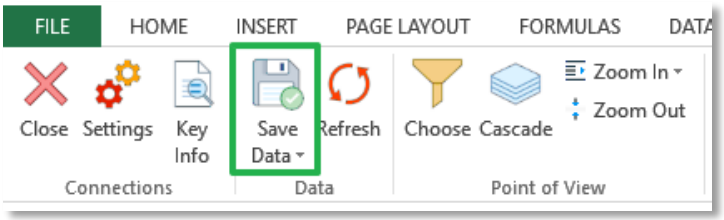


Cost of Sales

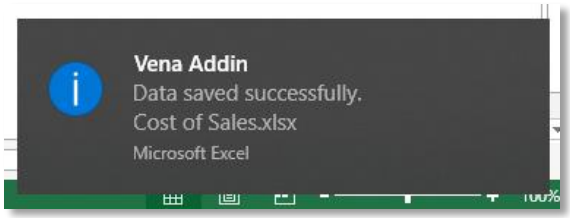
Dept 103	Input
Plan	Calculation
Y2015	

Accounts	Total Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Cost of Sales													
Product A (Widget)	10,254	748	388	1,172	1,000	344	1,024	1,188	169	1,132	1,157	1,184	748
Product B (Widget Pro)	8,767	680	536	858	407	978	221	899	1,035	627	862	622	1,042
Product C (Widget XL)	8,258	1,198	720	593	1,217	456	306	382	575	670	310	1,056	775
Product D (Widget Deluxe)	9,068	458	285	557	632	431	582	897	1,372	826	1,121	1,080	827
Product E (Widget 2.0)	8,394	245	367	655	744	303	369	191	678	1,346	1,385	920	1,191
Product F (Widget Mini)	10,470	1,048	1,317	887	840	1,110	1,334	1,295	311	227	775	464	862
Product G	8,866	1,374	361	339	538	159	620	928	1,156	450	907	970	1,064
Product H	8,977	738	508	1,359	269	1,143	793	652	881	273	516	1,383	462
Product I	9,201	402	957	265	290	305	1,241	865	1,079	1,036	927	479	1,355
Product J	8,626	269	496	932	266	529	775	1,005	1,135	665	842	1,202	510
Total Cost of Sales	90,881	7,160	5,935	7,617	6,203	5,758	7,265	8,302	8,391	7,252	8,802	9,360	8,836
Cost of Sales Threshold		10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000

3. When you're finished (or any time you want to save your progress), **click on the *Save Data* button** in the Vena Add-In ribbon to save your inputs to the Vena database:



4. A pop-up will appear to indicate that the data is being saved. Once it's done, you should see **a confirmation that the data has been saved successfully**:

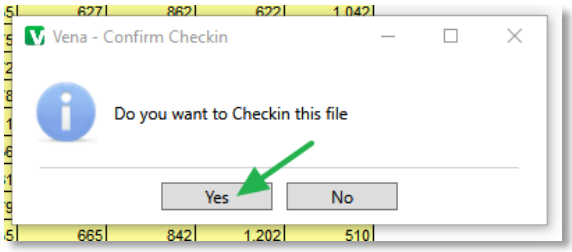


What about Line-Item Details?

On some input tasks, you may be asked to use **Line-Item Details**. If you need to use *Line-Item Details* as part of your input task, please see **Appendix B** at the end of this guide to learn more about this feature.

Closing a Vena Task Form

Once you're finished making inputs and have saved your work, **just close Excel as you normally would**. When you close Excel, you'll be asked if you want to check the task form back in: **click on *Yes*** to ensure that other users can use this task form again.



(If you click on *No*, don't worry – you can also check the form back in from the Vena web app by clicking on the *Check In* button in the Task Drawer.)

Module 9: Submitting Completed Tasks •

Overview

Return to the Vena web app and learn **how to submit completed tasks for review**.

*This is an **instructional module**: it contains a guide on **how to perform a task or action** in Vena.*

Reading Time

This module will take about **3 minutes** to read (3 *pages*).

Topics

This module covers the following topics:

- Submitting a data entry task for review
- Resubmitting rejected tasks

Choose Your Path

This module is recommended for:

- **Path II:** Data Entry •

Submitting a Task

When you have checked out all of your assigned task forms and entered and saved the required data, there's just one more step to completing the task: **submitting it**. In most cases, submitting the task means **submitting it for review**, where another user checks your work as part of your process workflow. And since your process is built into Vena, you submit your tasks right from the Vena web app.

Who can submit a task?

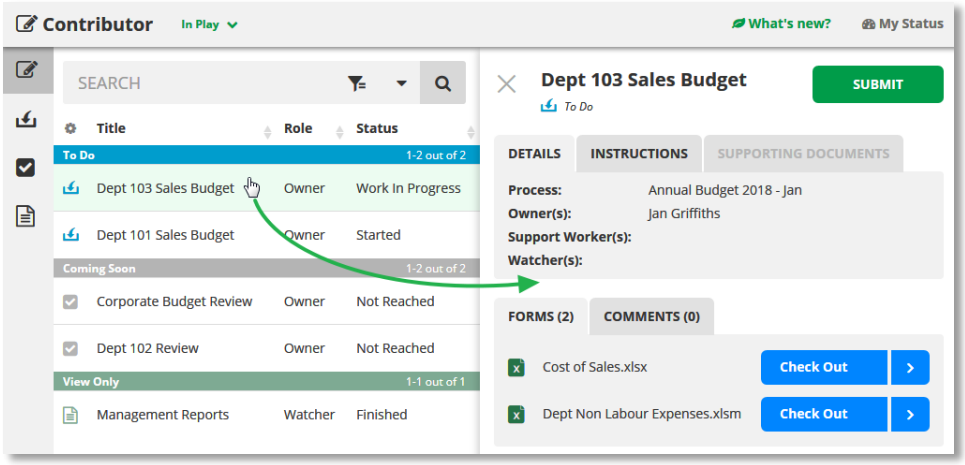
It's common for multiple people to work on a single task. **So who submits it?**

First of all, only **Task Owners** are responsible for submitting tasks. If you have been assigned to a task as a **Support Worker or Watcher**, you don't need to worry about submitting it.

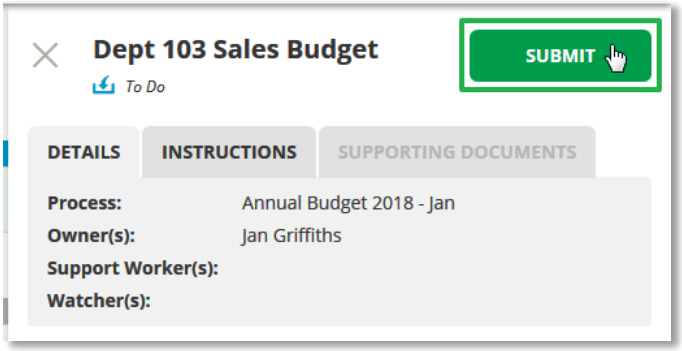
If you're one of multiple Task Owners on the task, **you or any other Task Owner can submit** the task, so it's generally a good idea for everyone to coordinate before submitting.

How to submit a task:

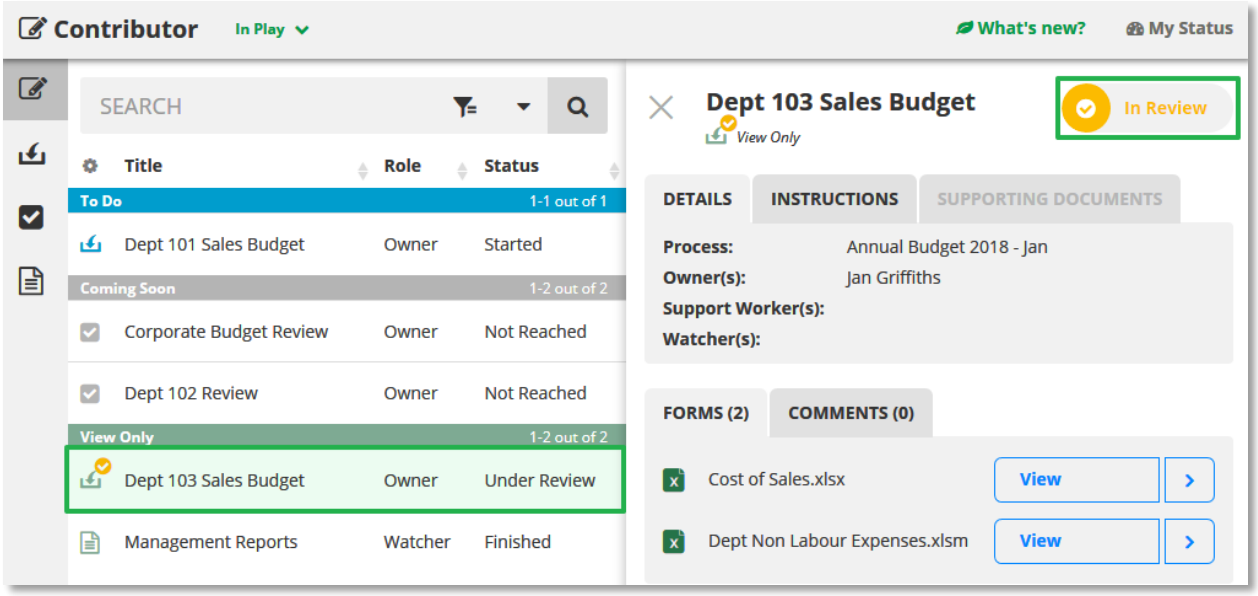
1. **Return to the Vena web app** (at *vena.io*) and view your Task List. Find the task you have just completed and want to submit. **Click on it to open the Task Drawer**:



2. In the top right corner of the Task Drawer, **click on the *Submit* button**.



3. A confirmation window will appear. **Click on *Yes*** to proceed with submitting the task.
4. That's it! Your task is now **submitted for review**. The *Submit* button on the task will **change to an *In Review* label**, and the task will move in your Task List **from the *To Do* section to the *View Only* section**.



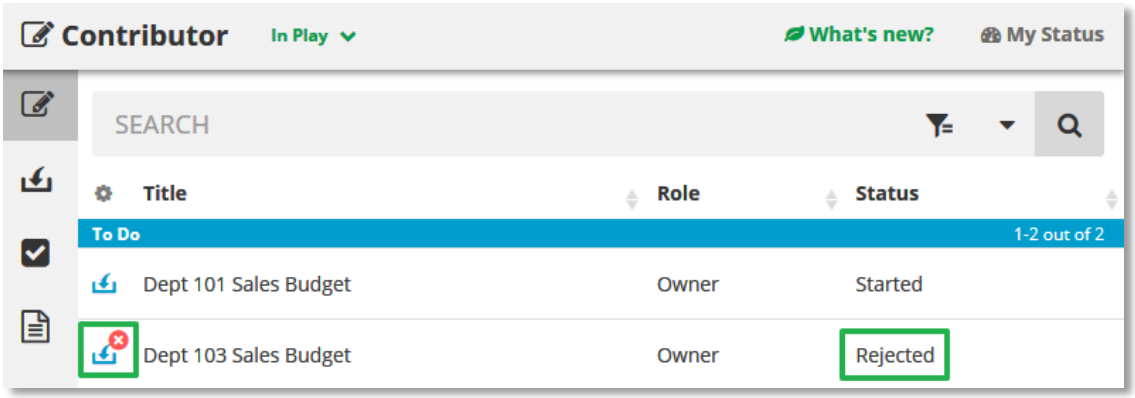
Rejected Tasks

Well done, you've completed a task! Your work will now be reviewed, so for the moment you're all set and can turn your attention to other things.

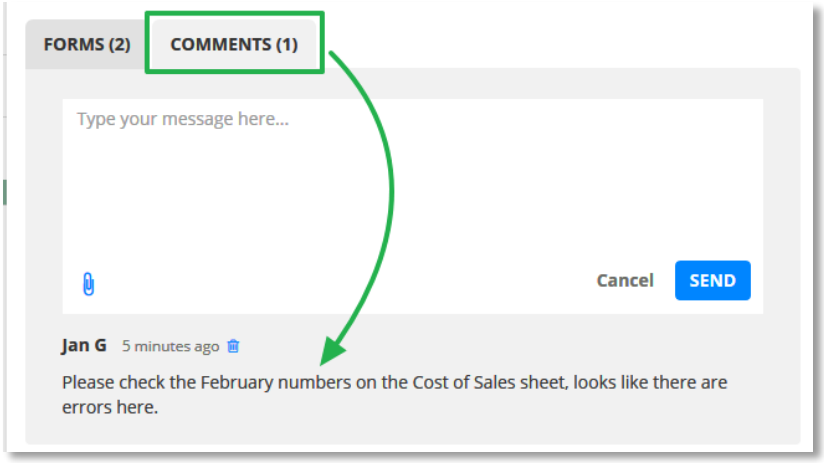
But you might not be done quite yet: **the person reviewing your task might reject it**, for example if they find an error. If this happens, you'll need to **return to the task to correct the issue and resubmit it**.

How to resubmit a rejected input task:

1. A rejected submission gets **added back to the *To Do* section of your Task List**, where it is marked with a **red *x* icon** and listed with the status *Rejected*:

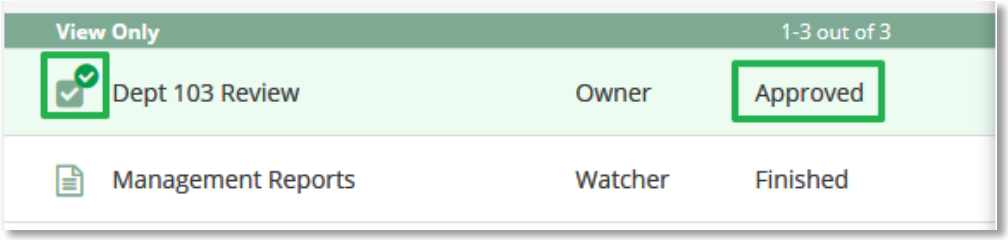


2. **Click on the task** to open the Task Drawer. Here, **click on the *Comments* tab** to see the reason why it was rejected:
   - *Note that you'll only see a rejection comment here if the reviewer provided one within Vena.*



3. **Click on the *Forms* tab** to check out and **work on the appropriate task forms** to resolve the issue.
4. When you're done, **click on the *Submit* button** in the Task Drawer again to **resubmit the task**.

When a task has been **approved**, you'll see that its status in the Task List changes **from *Under Review* to *Approved***, and a **green check icon** will appear next to it:



Module 10: Reviewing Data •

Overview

Learn **how to review data inputs** made by other users.

*This is an **instructional module**: it contains a guide on **how to perform a task or action** in Vena.*

Reading Time

This module will take about **3 minutes** to read (3 *pages*).

Topics

This module covers the following topics:

- Reviewing a data entry task
- Approving or rejecting tasks

Choose Your Path

This module is recommended for:

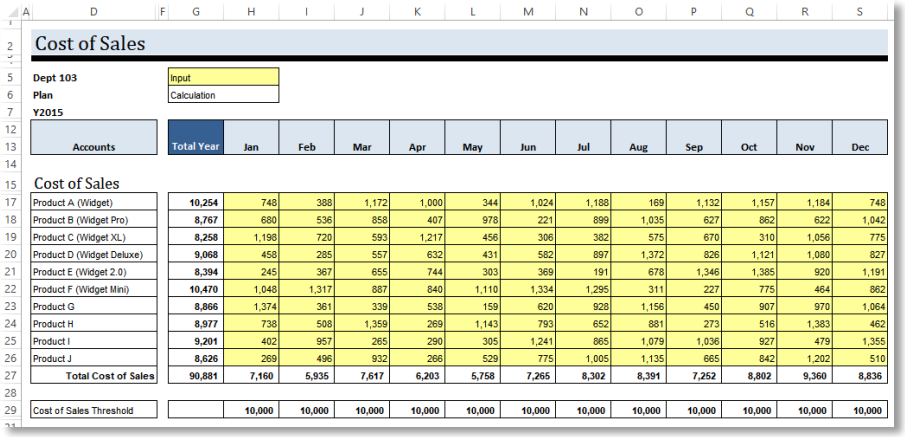
- **Path III:** Reviewer •

Reviewing Data Inputs

If you have been assigned a ***review task***, you will **review data entry work done by other users**, checking for errors and compliance with applicable rules. To do this, you will use **the same spreadsheets that were used to make the data inputs**, as you would when reviewing a normal spreadsheet. Of course, with Vena, you are guaranteed to always be looking at the latest version automatically.

How to perform a review in Vena:

1. With the spreadsheet open in Excel, **review it according to your organization's guidelines**.

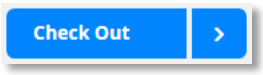


Cost of Sales

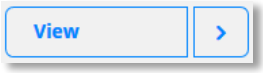
Dept 103 — Input
Plan — Calculation
Y2015

Accounts	Total Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Cost of Sales													
Product A (Widget)	10,254	748	388	1,172	1,000	344	1,024	1,188	169	1,132	1,157	1,184	748
Product B (Widget Pro)	8,767	680	536	858	407	978	221	899	1,035	627	862	622	1,042
Product C (Widget XL)	8,258	1,198	720	593	1,217	456	306	382	575	670	310	1,056	775
Product D (Widget Deluxe)	9,068	458	285	557	632	431	582	897	1,372	826	1,121	1,080	827
Product E (Widget 2.0)	8,394	245	367	655	744	303	369	191	678	1,346	1,385	920	1,191
Product F (Widget Mini)	10,470	1,048	1,317	887	840	1,110	1,334	1,295	311	227	775	464	862
Product G	8,866	1,374	361	339	538	159	620	928	1,156	450	907	970	1,064
Product H	8,977	738	508	1,359	269	1,143	793	652	881	273	516	1,383	462
Product I	9,201	402	957	265	290	305	1,241	865	1,079	1,036	927	479	1,355
Product J	8,626	269	496	932	266	529	775	1,005	1,135	665	842	1,202	510
Total Cost of Sales	90,881	7,160	5,935	7,617	6,203	5,758	7,265	8,302	8,391	7,252	8,802	9,360	8,836
Cost of Sales Threshold		10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000

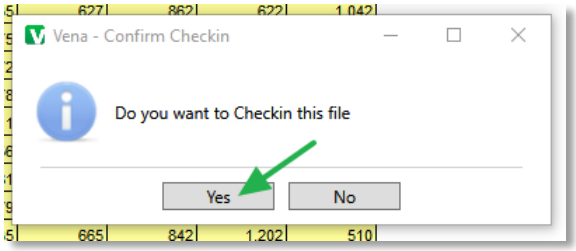
2. If you encounter any errors, **you may be able to make corrections yourself** if the task form is set up to allow this. Here's how to check:
   - If you clicked on **Check Out** to download the task form, you **can make changes yourself.** If this is the case, **see** ***Module 8: Entering Data*** **for instructions**.



   - If you clicked on **View** to download the task form, you will **not be able to make changes yourself.** Instead, use the **Reject** function (see below) to **send the task back to the submitter** to make the necessary changes.



3. Once you have finished your review, just **close Excel as you usually do**. If you were working on a spreadsheet that you had to check out before downloading, you'll be asked if you want to check the task form back in (click on *Yes*):



4. **Download and review the next task form** from the Vena web app. Repeat this process until you have **reviewed all the task forms** attached to the task.

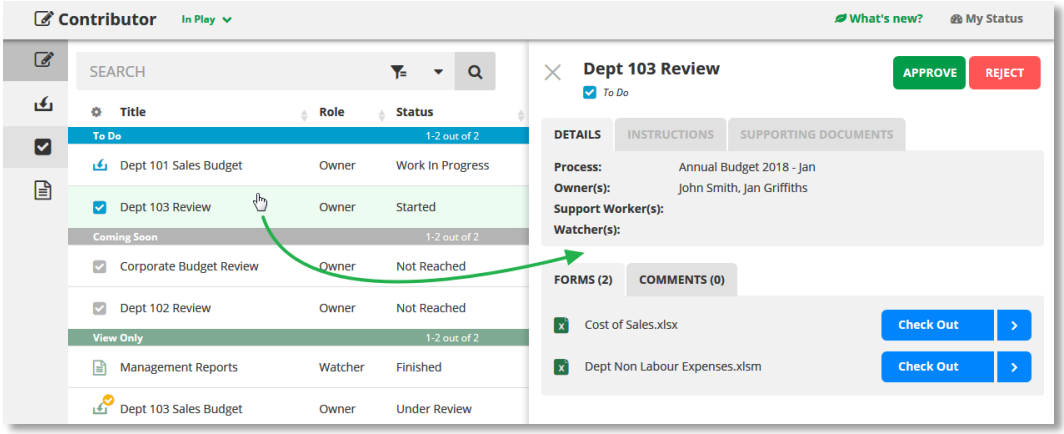
Approving and Rejecting Reviews

If you **identified that changes are needed** during your review, and you were unable to make these changes yourself, you can **reject the task back to the original submitter**. If everything was fine, you can **approve the task**, which will complete it and advance your Vena workflow.

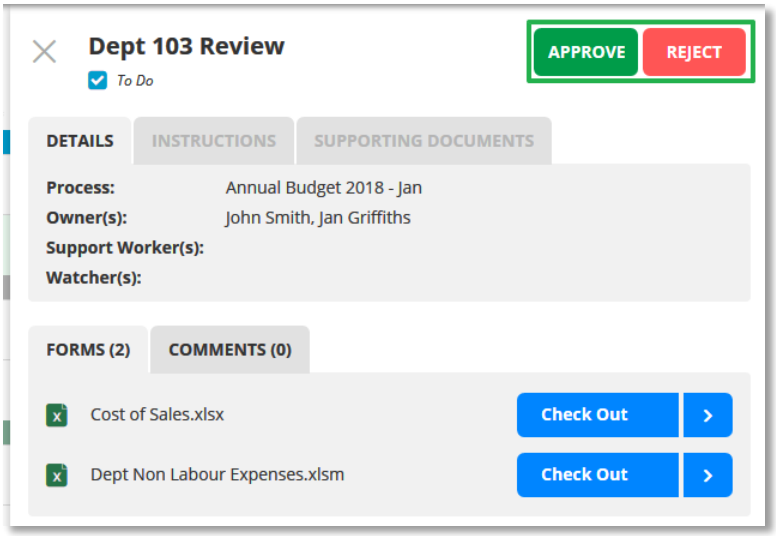
You can approve or reject a task at any time. Keep in mind that this will **approve or reject the entire task** – you can't reject only specific task forms.

How to approve or reject a review:

1. Return to the Vena web app (at *vena.io*) and find the review task you just worked on. **Click on it to open the Task Drawer**:

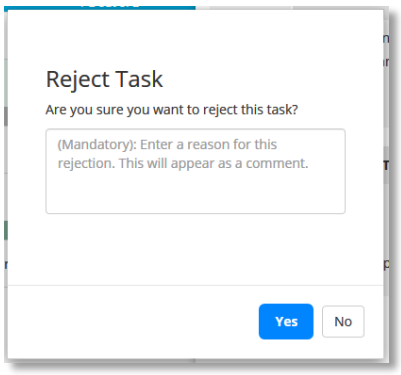


2. In the top right, find the ***Approve* and *Reject* buttons**:
3. If you need to reject the review, **click on the *Reject* button**. This will reassign the task back to the user(s) who submitted it so that they can make the necessary changes.

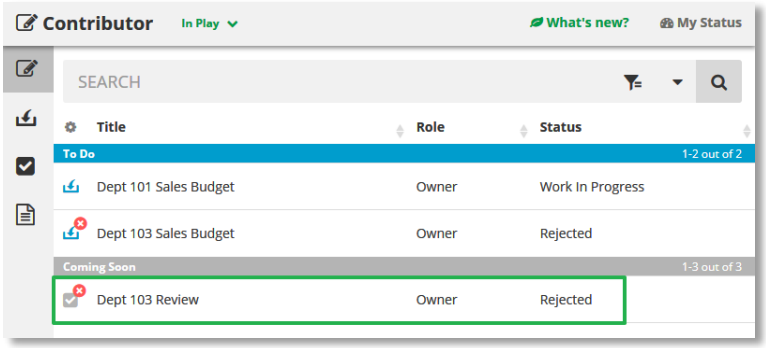


- If you were able to make the changes yourself, you may not need to use the *Reject* function.

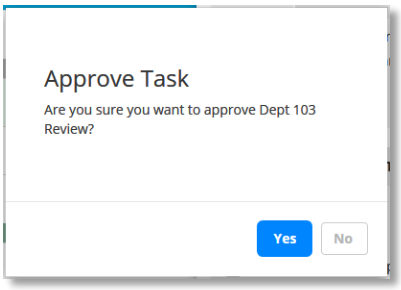
4. When you click on the *Reject* button, you will see **a confirmation pop-up**, along with **a text box where you can provide details about the reason** for the rejection. **Click on *Yes*** to proceed:
   - Entering a rejection reason may be optional or mandatory, depending on your Vena settings. Even if it is optional, **it is generally a best practice to provide a reason**.



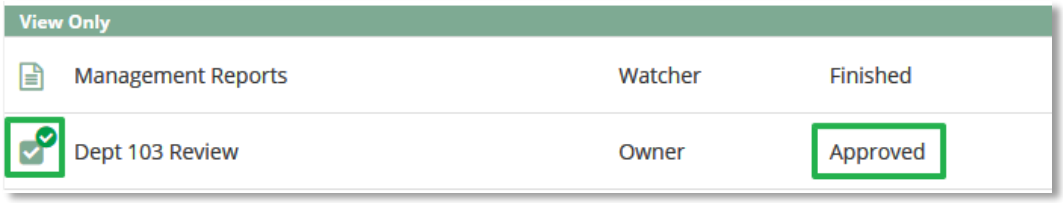
5. The rejected task will be moved in your Task List **from the *To Do* section to the *Coming Soon* section**, with the status *Rejected*:



6. If the review **did not turn up any issues**, you can simply approve it by **clicking on the *Approve* button**. As with rejecting a task, clicking on *Approve* will bring up a **confirmation pop-up**. **Click on *Yes*** to proceed:



Once a review on a task has been approved, it is considered completed. Completed tasks are added to the ***View Only* section** of the Task List and marked with the status ***Approved***, as well as a **green check icon**:



Appendix A: Additional Web App Features

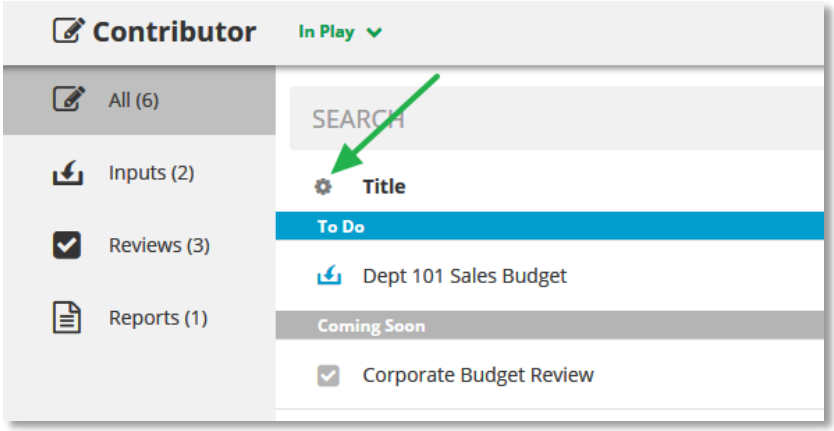
This appendix describes **additional functionality in the Vena web app** which was not covered in any of the earlier modules.

These features are **optional**, and are recommended for users who want to take advantage of all available functionality.

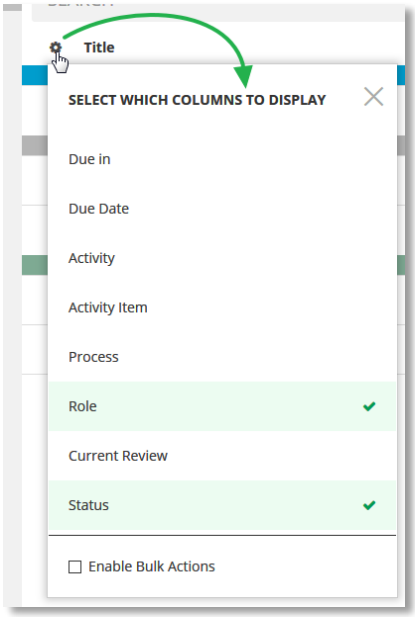
Customizing Task List Columns

In *Module 4*, we mentioned that the appearance of your Task List might be different from the screenshots in this guide. This is because **the columns shown in the Task List can be modified**. Here's how to do that:

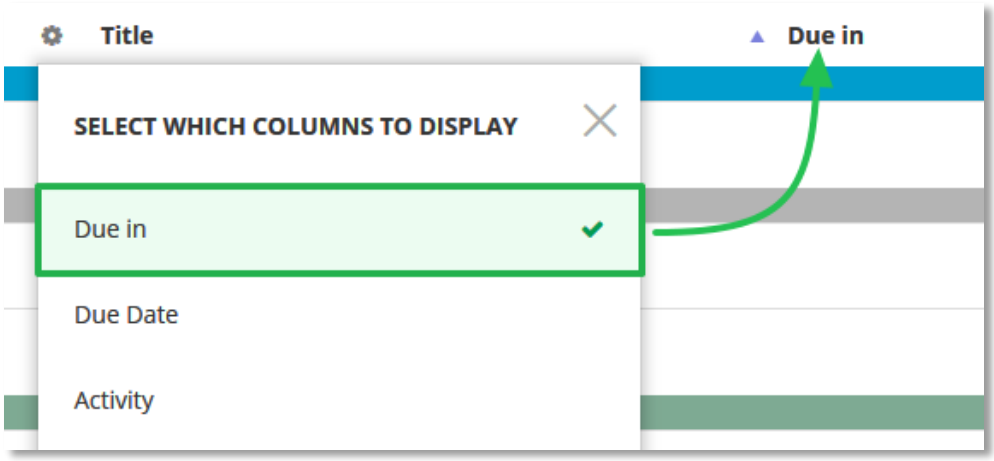
1. In the Task List, locate the **header bar** that contains the column headings. On the left side, you should see **a small *gear* icon next to the *Title* heading**:



2. **Click on the *gear* icon**, which will open a menu:



3. This menu displays all of the available columns. To customize your columns, **click on any columns you want to make visible** in the Task List. Columns selected to be displayed are highlighted in green and will have a checkmark beside them.



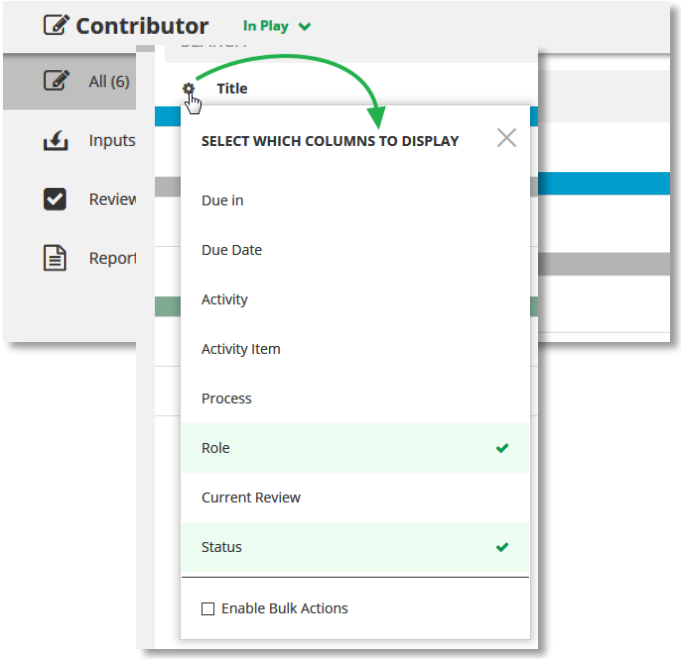
4. **Click on any currently visible column to remove it from your Task List**. This will remove the green highlight and checkmark.
    - Note that you can remove any column *except* the **Title** column, which is always visible.
5. When you select (add) or unselect (remove) a column, **the change is reflected in the Task List instantly**, and is also **saved automatically**.
    - Note that these changes only apply to **your own Task List**, not those of other users.
6. **Click on the *x* in the top left** of the menu to close it (or click anywhere within the Task List).

Bulk Actions

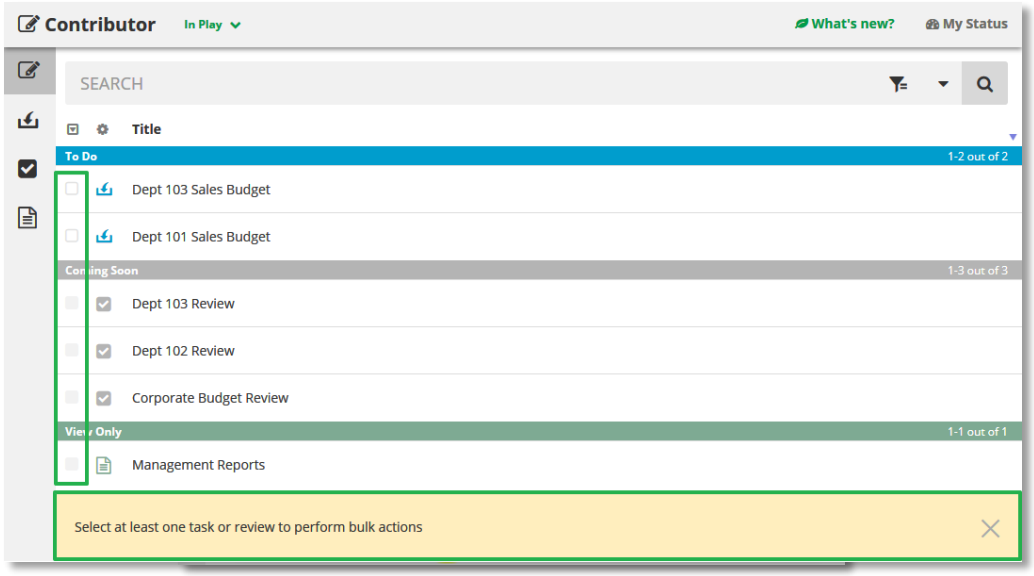
If you are the *Owner* of many **input tasks** or **review tasks** and have to submit or approve/reject a lot of them at once, you don't have to do this one-by-one. Instead, you have the option of **submitting input tasks or approving/rejecting reviews in bulk.** When enabled, this option allow you to multi-select tasks and submit/approve/reject them with a single click.

Enabling Bulk Actions

1. In the Task List, locate the **header bar** that contains the column headings. On the left side, you should see **a small *gear* icon next to the *Title* heading**:

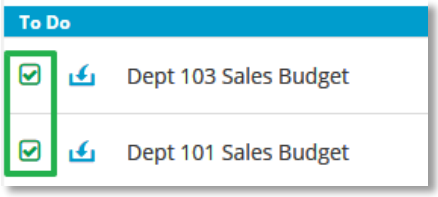


2. **Click on the *gear* icon**, which will open a menu:
3. In this menu, **click on the item *Enable Bulk Actions*** to activate this option:
4. Once enabled, you will see **a new column of checkboxes** to the left of your Task List, as well as **a yellow banner at the bottom of the screen**:
    - Note that **dismissing this banner will turn off Bulk Actions**.

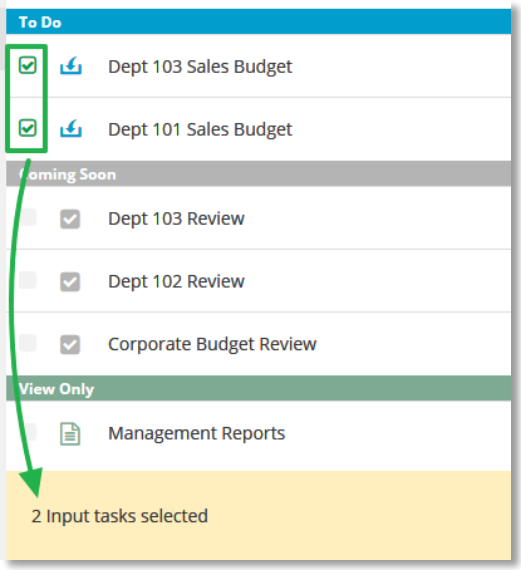


Submitting Input Tasks & Approving/Rejecting Reviews in Bulk

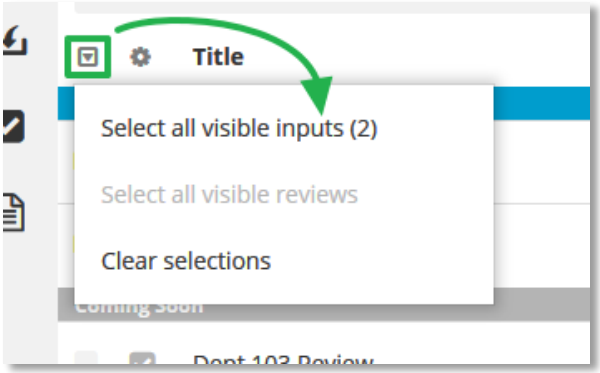
1. Multi-select the tasks to be submitted by **clicking on the checkbox next to each task** you want to submit in bulk:



2. The yellow banner at the bottom of the screen will update to **reflect the number of tasks selected**:

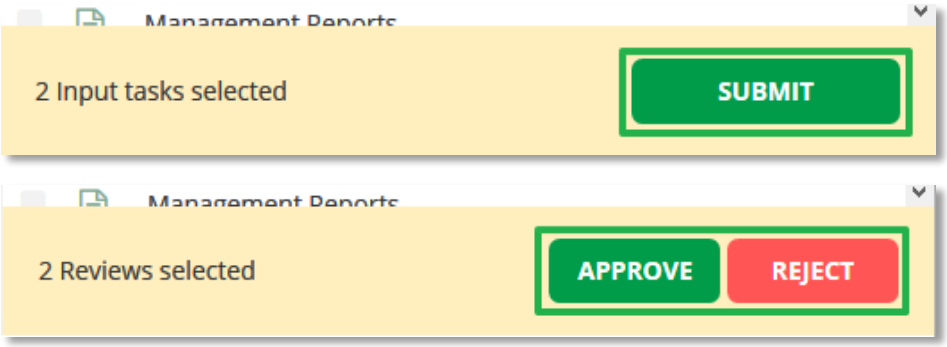


3. You can also use the **new menu button** that appears above the checkboxes in the header row to **select all visible input tasks or review tasks**, as well as to **clear current selections**:



- You can multi-select **either input tasks *or* review tasks**, but **tasks of both types can't be included in the same selection**.

4. When you're ready, **click on the *Submit* button** in the banner to submit the selected input tasks, or either the *Approve* or *Reject* button for review tasks:



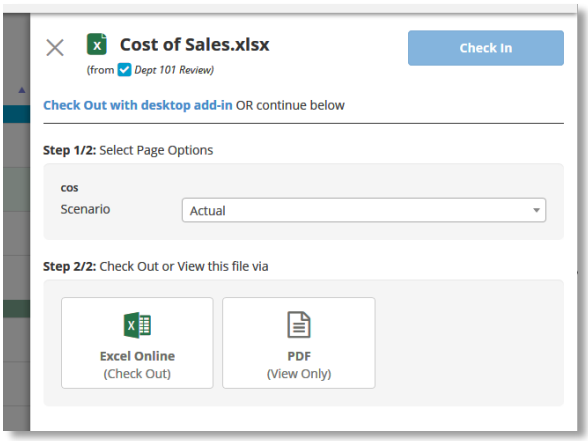
5. A confirmation pop-up will appear. **Click on *Yes*** to proceed.

Other Task Form Download Options

In *Module 5*, we mentioned that there are **additional ways to download task forms**. To see these options, **click on the > portion of the *Check Out/View* buttons:**

This will **open an additional section of the Task Drawer** that displays the other download options, **Excel Online and PDF**. These options require that you to **choose page options *before* downloading the file**, so a page option selector is also shown.

This additional options screen is **primarily intended for users who use Vena with Excel Online, as well as on Mac** (where its appearance differs slightly). For these users, there is also **a separate, platform-specific version of the Vena Add-In**.



As this guide **focuses on the Windows version** of the Add-In, we **will not cover Excel Online/Mac** here. However, if you are interested in learning more, **a separate guide is available** on the Vena Knowledge Base:

- How-To: Using Vena on a Mac or with Office Online

Appendix B: Additional Excel Add-In Features

This appendix describes **additional functionality in the Vena Add-in for Excel** which was not covered in any of the earlier modules.

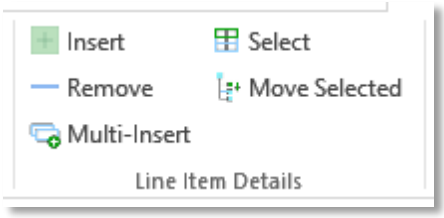
These features are **optional**, and are recommended for users who want to take advantage of all available functionality, **or whose Vena tasks require the use of these features**.

Line-Item Details

In *Module 8*, we mentioned that, for some ***input tasks***, you might be asked to **use the *Line-Item Details* feature**. This feature is used whenever **more granular detail on a data input is required**.

For example, you might need to break down a generic item like "Travel Expense" into separate line items like "Flight", "Lodging", "Car Rental", etc.

With *Line-Item Details*, you can **enter these individual line items onto the spreadsheet**, and they are **automatically summed to the main item**.



Line-Item Details (or *LIDs* for short) lives in its own section of the **Add-In menu ribbon**, which we briefly looked at in the overview in *Module 6*. If LIDs have been **enabled on the task form (input template) that you're using**, the functions in this section will allow you to **add and remove LIDs, as well as move them around** on the spreadsheet, if needed.

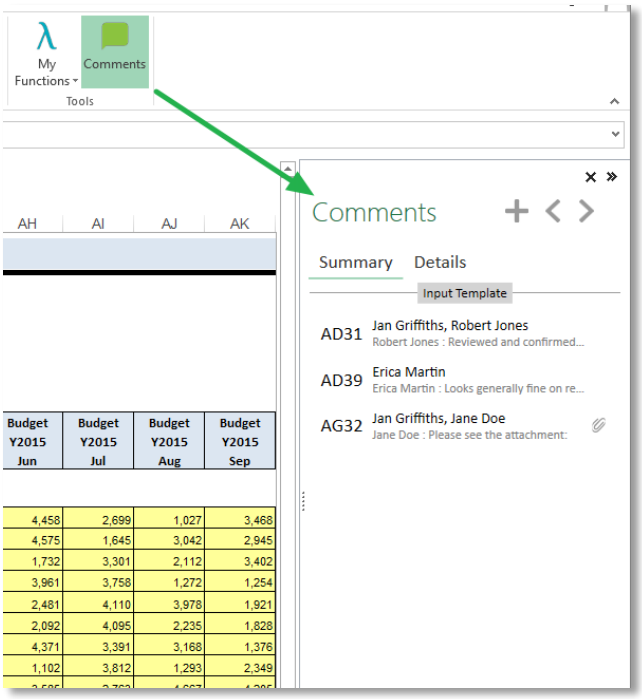
Since the *Line-Item Details* feature has to be specifically enabled on an input task form to be used, the designer of the task form will usually **note in the task instructions** (or sometimes on a cover sheet in the task form itself) **if you should use LIDs** when making inputs.

To learn **how to use Line-Item Details** on your input tasks, please see this article on the Vena Knowledge Base:

- How-To: Working with Line-Item Details as a Contributor

Intersection Comments

In Vena, you have the ability to add Comments in the web app to a task – but you can also **add them directly within a spreadsheet** using the Excel Add-In's ***Comments* feature**. When you have multiple people working together, using this feature can help to keep everyone coordinated.



The smart thing about comments made via the Add-In is that, unlike Excel comments, they are **not specific to the spreadsheet**. Instead, they are **saved directly to database *intersections*** (or *Line-Item Details*), which are unique locations in your Vena database where individual data values are also stored.

In other words, when you leave a comment on a cell in a Vena spreadsheet, that comment is **attached to the value in that cell**. As a result, no matter where that value appears, the comment will appear too – **even if it's on a completely different spreadsheet** than where the comment was made.

Why can't I use the *Comments* feature?

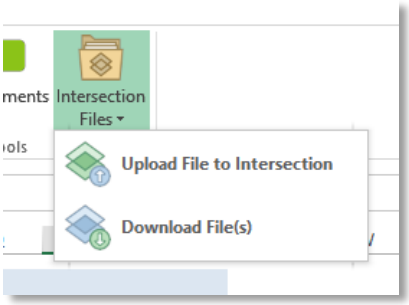
The *Comments* button might be disabled (greyed out) for you, which means that you can't use it. This is usually because **your Vena Admin has turned off this feature**.

If you'd like to learn more about the Add-In's *Comments* feature and how to use it, please refer to this article on the Vena Knowledge Base:

- How-To: Commenting on templates (Add-In Comments)

Intersection Files

Values (and comments) are not the only types of data that can be stored in a Vena database intersection. You can also **store entire files (including spreadsheets, documents, slide decks, etc.) in your Vena database**.



To do this, you can use the *Intersection Files* feature built into the Vena Add-In, which allows you to both **upload and download files to and from your Vena database**.

To learn how the Add-In's *Intersection Files* feature works, and how to use it, please see this article on the Vena Knowledge Base:

- How-To: Saving files to Vena database intersections