

Vena Training  
Roadmap  
for Customers

Persona: Business User

Contributor



Optional



Beginner

Role Specific

Core

Advanced

Expert

Persona: System Administrator

Administrator



Recommended



Optional



Optional



Persona: Solution Designer

Manager / Modeler



Optional



Vena Training Roadmap for Customers

Persona: Business User

Persona: System Administrator

Persona: Solution Designer

Contributor

Administrator

Manager / Modeler

Beginner

*Objective:* learners will feel comfortable getting started with Vena and have the **foundational knowledge** to complete additional training  
*Topics:* understanding Vena, an overview of the technology, terminology, roles, and interface

Role Specific

*Objective:* learners will be comfortable using Vena **independently** within their role as a **Contributor** for their organization  
*Topics:* running reports, entering data, approving/rejecting tasks

*Objective:* learners will be comfortable using Vena **independently** within their role as an **Administrator** for their organization  
*Topics:* creating & managing permissions, creating & managing users, global policies

Core

Optional

Recommended

*Objective:* learners will feel empowered to **independently maintain Vena** for their organization  
*Topics:* managing data model, mapping, report management, workflow

Advanced

Optional

*Objective:* learners will feel empowered to **independently create Vena solutions** for their organization  
*Topics:* create data model, create input, dynamic mapping, workflow

Expert

Optional

*Objective:* learners will feel empowered to **independently explore and create advanced Vena solutions** for their organization  
*Topics:* calculated members, VenaQL, integrations, automation

Vena Training  
Roadmap  
for Venanites

Sales / CSMs / Product &  
Development

PS / Support / Training /  
Finance / Partners

HR / Marketing / Office  
Operations

Beginner



Role Specific



Core



Advanced



Expert



# Vena Training Roadmap - Course Topics

## Beginner

New Learner Path

- What is Vena
- The value of Vena (3 layers)
- Technology basics (OLAP)
- Terminology
- Roles Overview
- Interface Overview

Logging in

Vena web/add-in walk through

## Contributor

Navigating on Vena web

Running reports

Template check in & check out

How to save data

Inserting cell comments

Drill saves

Inserting line-item details

Compare audit trail

Roll back data from previous save

Force check-in in status tracker

Approve/reject tasks

Relevant toolbar buttons

## Administrator

User permissions

User groups

Data permissions

Global policies

Application permissions

Adding a new user

Updating a user

Deactivating a user

Managing SSO

## Core

Modeling

fundamentals

Mapping fundamentals

Best practices

Static report

Basic debugging

Report layouts

Vena features

Modifying reports

Basic dynamic mapping

Maintain input table

Process variables

Vena features

Using line-item details

Contributor experience

- Reports

- Data entry

- Submit/review task

Workflow overview

Versioning

Ad-hoc reporting

Vena toolbar buttons

Update model/process

Troubleshooting/FAQs

Intro to permissions

Versioning/rollover

## Advanced

Importing structure/data

Dynamic mapping/flags

Input tables & templates

Non-dimension specific

OPEX template

Best practices

Mapping shortcuts

Process variables

Creating line-item details

Scenario comparisons

Rolling forecast

Supercharge Vena files

Creating workflow

Workflow rollover

Report books

ETL

Task bindings

Attributes

Common mapping errors

Create/set up data model

PPT/Word integration

Allocations

Multi dynamic rows

Creating dashboards

“How to” case studies

## Expert

Calcs

VenaQL

Workflow Automation

Drill to transactions

Expert MDR

Staging tables

Integrations

Currency Conversion

“How to” use case videos e.g. How to make a rolling forecast, how to link choose box to column mappings, combining features