

Course Title: Level 1 - Creating and Maintaining Processes

Modules	<ol style="list-style-type: none"> 1. Refresher on Manager Role 2. Process Overview 3. How to Create a Process 4. Process Rollover 5. How to Copy a Process 6. Centralizing Process Variables 7. How to Create Process or Folder Variables 8. How to Use Process or Folder Variables 9. How to Maintain Process or Folder Variables 10. How to Delete Process or Folder Variables
Objectives	<ol style="list-style-type: none"> 1. Describe the Vena Manager role and the Manager's key responsibilities 2. Create a process 3. Copy a process and describe process rollover 4. Create and maintain process or folder variables
Notes	<p>https://docs.google.com/document/d/1d6f5n13T--Q105kBOd15z9QmEU2rmNAolqdFhXcGzc/edit</p> <p>https://support.venasolutions.com/hc/en-us/articles/115003066646-Resource-Vena-Cheat-Sheets?flash_digest=8e34aa9a18f23afb694777d4e0a109f7f99228eb</p> <p>https://support.venasolutions.com/hc/en-us/articles/360030787312-How-To-Set-up-a-Process-Workflow</p> <p>https://support.venasolutions.com/hc/en-us/articles/207600486-How-To-Rolling-over-a-process-for-the-next-cycle</p> <p>https://support.venasolutions.com/hc/en-us/articles/207826203-How-To-Using-Process-and-Folder-Variables-to-update-mappings-across-multiple-templates-in-one-step</p>

Module: Refresher on Manager Role

	Screen	Script
1	Series Title Slide	Welcome to the Business Process Maintenance series.
2	Title Slide	This course is the first in the Business Process Maintenance series and will introduce creating and maintaining processes within Vena.
3	Best Practices for Navigating Vena	<p>Here are some best practices for navigating eLearning courses on Vena learning.</p> <p>Complete each module in its entirety to update your course progress on Vena Learning.</p>

		<p>Use the resume button to pick up where you left off in a module if you need to take a break.</p> <p>Avoid using other application windows while playing a course to ensure that your viewing progress is captured.</p> <p>Avoid pausing the course for more than fifteen minutes to avoid Time Out errors</p>
4	Objectives	By the end of this course, you will be able to describe the Vena Manager role and the Manager's key responsibilities, create a process, copy a process and describe process rollover, and create and maintain process or folder variables
5	Subtitle	Let's begin with a refresher on the Vena Manager role.
6	Manager home background with 4 coloured boxes	<p>The Manager is responsible for the following tasks in Vena:</p> <ul style="list-style-type: none"> ● uploading files as templates and reports, ● building and editing Vena templates and reports, ● creating and managing process workflows, and ● monitoring workflow statuses and submissions.
7	highlight folders and processes	When viewing the Manager tab, the Vena Manager can see the folders and processes which are available for their organization.
8	caution with text box	A Manager is granted permissions and will only see processes that they have permission to view.
9	Arrow to folder and then move over to process	The Manager will need to select a folder and process in order to make changes to specific templates or reports in Vena.
10	Highlight multiple processes as they are said in audio	Multiple processes can be used to address various business needs. For example, the organization may have separate processes to capture budgeting for expense planning, versus personnel planning or revenue planning.
11	Show workflow designer	Once the process has been selected, the Manager is automatically taken to the process designer, or workflow. The workflow outlines how reports and templates will be distributed and collected among various tasks and users. Workflow will be covered in more detail in future training.

12	Highlight left side icons, highlight each icon for task as it is said in audio	Along the left side of the screen, the Manager has access to various functions such as the files library, status tracker, and files audit.
13	show files in files library	The files library contains all of the reports, input templates, and other documents associated with the selected process.
14	show status tracker	The status tracker is a dashboard that provides a snapshot of tasks and their status based on the workflow.
15	show files audit	The files audit provides a detailed list of all the template and data saves made to the process files. Files audit is covered in more detail in the Auditing Files and Data course.
16	Module complete	The Vena Manager plays a key role in managing the processes needed by their organization. Let's explore more about processes next.

Module: Process Overview

	Screen	Script
1	Subtitle Slide	In this module, we'll explore processes in Vena.
2	manager background, fade with 4 elements (circles across the middle?)	Business processes can be centrally managed in Vena using 4 main elements: workflow, files, data models, and data variables.
3	Show end state of workflow	Workflow organizes the activities of a given process into a flowchart. Workflow also automates communication and execution within the process.
4	Overlay supercorp logo, fade and highlight some of the boxes in the workflow	For example, SuperCorps budget process workflow defines which templates and reports are used in the process and by which users.
5	Show end state of files library	The global and process files libraries contain all of the reports and templates used throughout the process.
6	lightbulb with text box	Recall that process files are specific to one process, while global files can be used for a number of processes.
7	overlay supercorp logo, fade and highlight some of the reports and documents	For SuperCorp, as part of the budgeting process, a number of financial statements and supporting documents have been stored in the files library.

8	Show data model in vena web and highlight the dimensions and members	The data model contains all of the data that will be used in the process, as viewed in reports or modified through templates.
9	overlay supercorp logo, fade and highlight data for multiple years	The SuperCorp data model contains all of the financial data, including historical, current, and budget data, for the organization.
10	Show process variables in drawer for budget planning process	Data variables, known as Process or Folder variables in Vena, are used to automate the maintenance of business processes.
11	highlight variables in the list within the drawer	SuperCorp uses process variables to designate their current fiscal period (or month) and budgeting year within their reports. As the calendar year progresses, SuperCorps current fiscal period and budgeting year will change.
12	show elements again with a link icon in the middle	Once the process has been created in Vena, these four elements must be configured.
13	Show homepage with list of processes - fade to open drawer with manage models	Manage Models is used to link the data models that will be used in this particular process. This must be done in order to map new files or refresh data in existing files.
14	lightbulb with explanation show 1 process with multiple data models (use text boxes) and 1 data model with multiple processes (hierarchy with textboxes)	Note that processes and data models have a many to many relationship. One process can be tied to multiple data models, or one data model can be tied to multiple processes. You can learn more about data models in the Modeler and Data Model course.
15	Show from empty state, fade to end state pushpin with the name of other course	Reports and templates are uploaded to the Files Library so that they can be mapped to the data models. You can learn more about the files library in the Opening Files in Vena course.
16	show PV drawer and fade to report with something to show the PV being used - maybe the mapping window?	The process variables that have been defined within the process are used in the reports and templates to automate process maintenance. Process variables will be covered in more detail in a future module of this course.
17	Show from empty state, fade to end state,	And finally, the workflow of the process must be configured in order to outline how the reports and templates will be used and by which users. Workflow will be covered in more detail in future training.
18	fade background with text box and contributor to-do list	The elements of the business process come together to allow Vena Contributors to:

		<ul style="list-style-type: none"> • Access reports and templates associated with their assigned tasks • View or edit data in the data models associated with the process, and • Submit the task or approve or reject input from another task.
19	Module Complete	Let's get started with how to create a process in our next video tutorial.

Module: Process Rollover

	Screen	Script
1	Subtitle Slide	In this module, we'll explore process rollover in Vena.
2	Manager view with fade background and show cycle repeating	Most business processes, particularly financial processes are cyclical. This means that the same processes repeat on a periodic basis (such as monthly or yearly).
3	cycle icon with arrow to the next cycle, text box with process rollover	As an organization approaches the end of a cycle, there are certain steps that must be taken in Vena to prepare for the next cycle. This is referred to as a Process Rollover.
4	lightbulb with text box	Vena recommends using a new process for each cycle, rather than restarting or reusing the previous process. This allows the previous templates, reports, and process flow of each cycle to be preserved for audit purposes.
5	show where to click for a copy	In order to avoid creating a new process from scratch, Managers in Vena can copy the process from the previous cycle.
6	lightbulb with text box	It is best practice to create a new process by copying a completed process before the next cycle begins.
7	boxes or circles across middle with the four things that are copied	When a process is copied, the following pieces are included in the copy: <ul style="list-style-type: none"> • Associations between the process and the data models • Files from the Files Library, and associations between the process and any Global Files

		<ul style="list-style-type: none"> • Workflow, including assigned users and attached files • Process variables
8	show copy of process, icon representing change and text boxes with Files and Workflow	After copying a process, the Manager can make any necessary changes to the Files or the Workflow in the new Process.
9	Show process variables tray	Process variables within the process will also need to be updated.
10	Highlight currentyear variable on one side of the screen, fade to report, zoom in on currentyear, change in sliding drawer and show impact on the report	For example, the CurrentYear variable would be updated so that all reports and templates mapped to that process variable are automatically updated. More details about process variable updates will be covered in another module of this course.
11	icon to represent copying data with arrow to new process	The process rollover may also require versioning of the data before the next cycle begins.
12	show report example with prior year actuals in it, pushpin with textbox for other course name	An example of data versioning might be to copy prior-year Actuals into current year Budget so that planning templates are full of data that can be used as a “starting point” or overwritten. More information about data versioning can be found in the Data Maintenance Course.
13	Module Complete	Let’s see how to copy a process in our next video tutorial.

Module: Centralizing Process Variables

	Screen	Script
1	Subtitle Slide	In this module, we’ll explore process and folder variables in more detail and how they are used to automate process maintenance within Vena.
2	text boxes with process variables and folder variables fade in	Process and folder variables are used to update mappings across many templates at once. Using variables enables Managers to spend less time maintaining reports and ensures more accurate reporting.
3	arrow down from each text box above to another text box describing each	Process variables apply to an individual process, while a folder variable applies across all processes contained within the same folder.

4	Fade in SuperCorp logo	Let's look at a process rollover for SuperCorp's budgeting and forecasting process to understand how process and folder variables work.
5	Show list of files in files library and highlight those which would have current year	SuperCorp has a number of templates in which the current year is mapped.
6	sync icon and copy icon to show rollover process	To get ready for the next year, SuperCorp will perform a process rollover by copying the current process.
7	show text callout for each of the files in the files library	Following this, SuperCorp will need to update the current year mapping on all the templates in that process.
8	red X through each callout and then fade in with process variables	To save the effort of opening, updating, and saving each template, process and folder variables can be used to automate this maintenance.
9	highlight members in manager view, text boxes for process and folder variables, highlight a member fade in arrow to show it being replaced by PV	Process and folder variables are objects which can be associated with a particular member from a particular dimension of the data model. The variable itself can then be mapped in place of that member on any template within the same data model.
10	show process variables drawer	The advantage of this approach is that these process and folder variables are managed from one single, central location.
11	highlight change to process variable with arrows going to all of the different files	Making a change to a single process or folder variable will automatically propagate everywhere that the variable is mapped.
12	show budgeting report with actuals and non-actuals	In addition to using variables as part of the process rollover, variables can be used for maintenance automation for reports and templates that feature a mix of actuals and non-actuals.
13	fade in SuperCorp logo on left, highlight CurrentMonth PV and the current value in the sliding drawer	Returning to SuperCorp's budgeting process, the variable CurrentMonth has been mapped in place of the period member.
14	fade in updated value and show updated report	When the period is over, the variable is updated to the next period, which will automatically remap all of the templates to that period in a single step.
15	Highlight create button	Before a Vena Manager can use variables, they must be created in Vena and assigned a member from the data model.
16	Show variable being used in the report	Once created, the variable can be mapped in multiple

	mapping window	templates and reports. In these mappings, the variable itself will be replaced automatically with the assigned member value.
17	Show editing of variable - highlight edit and fade to new value.	Variables are maintained through the process variables sliding drawer and their values can be updated at any time, including for processes that are in play.
18	caution with textbox	Note that when a process variable is updated, it will immediately impact all templates that use that variable.
19	Highlight delete option in drawer caution with textbox for breaking mappings	If a variable becomes obsolete, it may be deleted. However, this will break any template mappings that rely on this variable. If another variable for the same dimension exists at the folder level, Vena will automatically use the folder variable instead.
20	caution with textbox	Note that if both folder variables and process variables exist, the lowest-level variable overrides all others.
21	Module Complete	Let's explore creating, using, maintaining, and deleting process and folder variables in our next set of video tutorials.

TEMPLATE – DO NOT DELETE OR FILL IN!

Module:

	Screen	Script
1	Subtitle Slide	
2		
3		
4		
5		

STOP REVIEWING HERE PLEASE

Quiz/Interactivity

Question Type	Question	Responses		
		Yes	No	Try Again
Choose an item.		Yes. That's right.	Sorry. That's incorrect.	Not quite. Try again.
Choose an item.		Yes. That's right.	Sorry. That's incorrect.	Not quite. Try again.
Choose an item.		Yes. That's right.	Sorry. That's incorrect.	Not quite. Try again.
Choose an item.		Yes. That's right.	Sorry. That's incorrect.	Not quite. Try again.