

EMBRACE, DON'T REPLACE YOUR SPREADSHEETS

# Vena 5 Overview

An Innovative Approach to  
Corporate Performance Management

Vena 5 is an easy-to-use and rapidly deployed solution for budgeting, planning, forecasting, reporting, analytics, and other Corporate Performance Management (CPM) applications in a single, web-based platform that leverages your existing spreadsheets and financial models. Our innovative platform uniquely combines the flexibility and agility organizations are accustomed to with Microsoft Excel® with the added structure and security of a traditional CPM solution.

Utilizing Microsoft Excel as the primary user interface, Vena 5 is easy-to-use, delivers high adoption rates, reduced implementation time, and fast time to value.

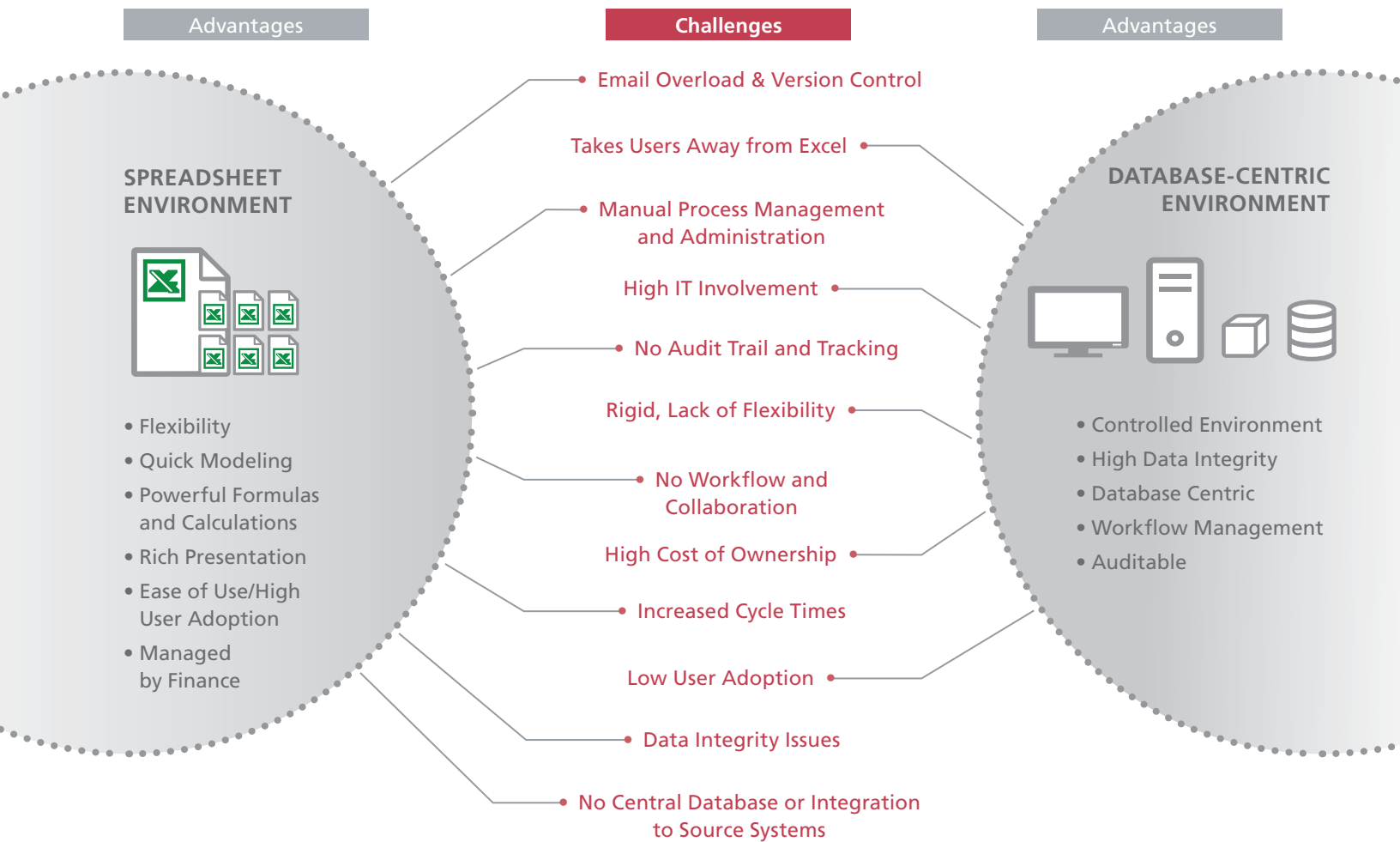
CORPORATE PERFORMANCE MANAGEMENT EXTENDED

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# Process Challenges

For years, the technology used for corporate performance management applications has been a story of two extremes. On one end, an uncontrolled distribution and assembly of spreadsheets typically shared by email; and on the other, a rigid, IT-constrained database-driven application.



## Uncontrolled Spreadsheet Environments

When it comes to CPM applications, many organizations gravitate toward Microsoft Excel to manage processes and tasks. Although Excel has robust capabilities, it's inadequate when it comes to collecting and distributing multiple spreadsheets in a collaborative environment. In an uncontrolled spreadsheet environment, processes are often manually intensive, inefficient, unstable, and difficult to audit.

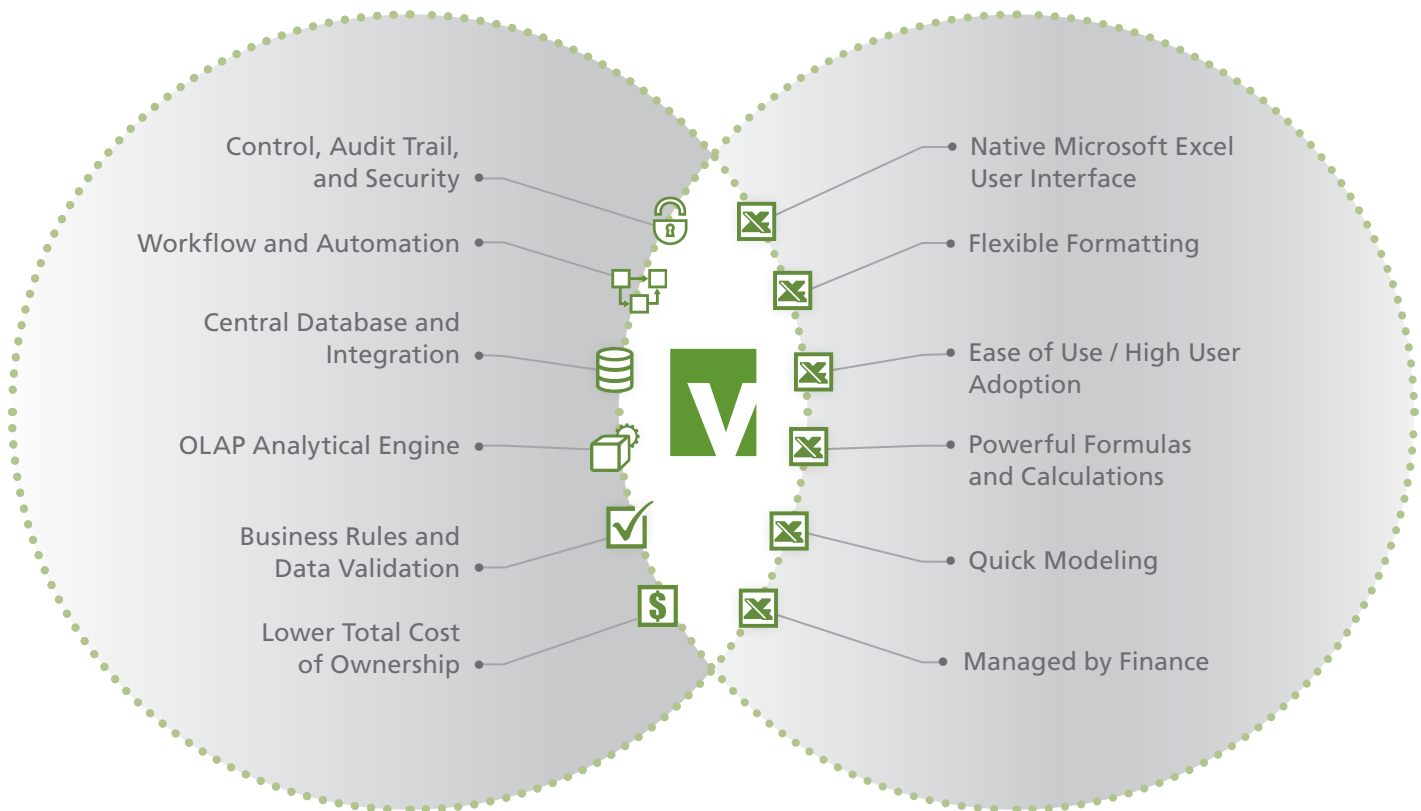
## Rigid, Database-Centric Systems

Alternatively, database-centric applications offer immense security, control, and auditing capabilities, but for finance and accounting, these solutions are limiting, expensive, and require IT support. Most importantly, these applications are often too rigid – forcing finance and accounting users to export data back to Excel for further manipulation, analysis, and formatting.

# The Solution

## An Innovative Approach

Vena 5 uniquely combines the best of both worlds – fully embracing and utilizing Microsoft Excel within a database-centric environment while eliminating the challenges. The resulting solution delivers data governance and user collaboration that is easy to use, quick to implement, and facilitates data collection, reporting, and analysis for processes beyond traditional CPM solutions.



## The Vena Solutions Method

Vena 5 implementations begin by leveraging and renovating existing spreadsheets, formulas, calculations, and process methodologies – preparing them for an automated process environment followed by the addition of controls, business rules, data validation, and workflow options. Clients are not required to replace their current models and spreadsheets, so the resulting solution is tailored to business needs, and is implemented in a fraction of the time.

### IMPLEMENTATION PROCESS

#### CENTRALIZE

- Inventory spreadsheets
- Dynamically map spreadsheet data to central database
- Integrate with source systems

#### CONTROL

- Add roles and security
- Enable auditing
- Insert business rules and data validation

#### AUTOMATE

- Graphically map out processes
- Assign tasks, templates, and schedules to workflow

#### DELIVER

- Unified plans and forecasts
- Variance and ad-hoc analysis
- Regulatory and management reports
- Unified data

# Vena 5 Features

## Power and Flexibility to Automate Multiple Applications

Leveraging the investments made in spreadsheets, Vena 5 adds workflow, auditing, automation, and business rules in a single, unified environment. The resulting solution keeps users in Microsoft Excel, eliminates the headaches associated with spreadsheet-based processes, and adds the control, security, and data integrity required to automate corporate performance management applications.



### Process Automation

Manage the entire process, tasks, and user communication centrally

- Visually design workflow and processes with the drag-and-drop process designer.
- Map, automate, track, and manage processes specific to your business requirements.
- Automatically notify managers and contributors when templates and notes are available to edit, review, approve or reject.
- Pre-populate templates and reports with information from source systems.



### Native Microsoft Excel User Interface

If you can use Excel, you already know how to use Vena 5

- Take full advantage of Microsoft Excel's productivity tools such as conditional formatting and formulas, auto-fill, charts, graphs, and more.
- Conveniently work offline in Microsoft Excel and synchronize when reconnected.
- Supports Microsoft Excel upgrades – including Business Intelligence and Data Visualization enhancements.

**Vena5**



### Security, Auditing, and Data Validation

Control access to sensitive data, track changes, and enforce business rules

- Role-based security provides appropriate access to contributors, reviewers, and approvers.
- Track every change by user in a detailed audit log.
- Visually display changes to data, formulas, and comments on a cell-by-cell basis.
- Enforce organization business rules, formulas, and validation rules.



### Powerful Database Technology

Centrally store and consolidate data and templates in a scalable environment

- Eliminate email overload and data redundancy.
- Centrally store the most up-to-date spreadsheets, templates, business drivers, assumptions, and more.
- Automatically consolidate data without linking spreadsheets or running macros.
- Analyze results with the powerful OLAP engine.



ERP



G/L



HRIS



DW

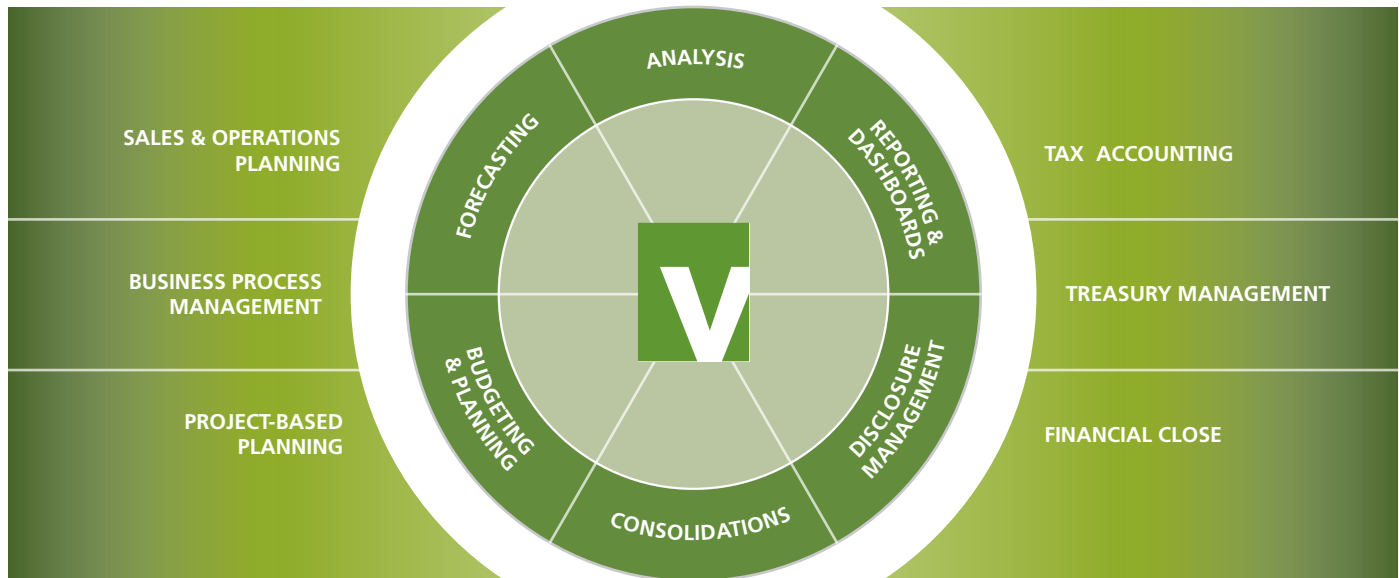


SPREADSHEET DATA



Source Systems

# Vena 5 Advantage



## Automation that goes beyond Corporate Performance Management

**Flexible and highly configurable, Vena 5 automates any critical finance, accounting, and operational process**

- Automate data collection, reporting, and analysis for any spreadsheet based process involving multiple contributors.
- Improve collaboration across multiple departments.
- Vena 5 is built on a robust platform, and is well suited for traditional CPM applications.

## Data Integrity and Confidence

**Higher confidence in the numbers**

- High degree of control, security, and auditing eliminate the opportunity to introduce errors.
- Central database creates "Single version of the truth."
- Source system integration with real time updates.
- Drill through to underlying data, calculations, and values.

## Fast Time to Value

**Leverage existing investments in spreadsheet models and processes**

- Minimizes change management and training.
- Extremely high user adoption and buy-in.
- Leverages existing spreadsheets and models – the "Ultimate Starter Kit."
- Rapid implementation with on-site, or cloud-based deployment.

## Increased Efficiency

**Replace low-value, manual tasks with automated, high-value functions**

- Increase efficiency, eliminate errors, and replace manual steps with a repeatable, adjustable, and automated processes.
- Enhance plans, reports and analysis; and ensure objectives are met on-time with less stress.
- Owned and managed by business users, not IT.
- No dependency on spreadsheet linking or running macros.

*"When we saw the solution, we obviously loved it - it was in Excel!"*

- Caroline Rubin,  
Controller, First Wind Energy

*"It was really tight, in weeks we went from zero to production, but we knew had we gone with another vendor, it would have taken much longer."*

- Kent McDonald,  
VP Finance, Canpar Courier

*"If you're comfortable with Excel, you should be comfortable with Vena."*

- Shawn Lyons,  
VP Financial Operations, Home Trust

*“Vena has gone a step further by leveraging the power and familiarity of Excel itself and integrating it into the Budgeting, Planning, and Reporting processes”*

Craig Schiff, CEO of BPM Partners

For more information, please visit our website at [www.venasolutions.com](http://www.venasolutions.com)

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**U.S. Central Region  
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**About Vena Solutions**

Vena Solutions delivers the most flexible performance management solution available for budgeting, forecasting, planning, reporting, analytics, and other mission-critical finance and accounting processes to large and mid-market companies around the world. Vena’s unified web-based software platform embraces all the power and flexibility of Microsoft Excel yet provides powerful workflow management, control and reporting capabilities. This unique approach is complemented by a dedicated consulting, advisory and training team. The result is fast time to benefit for our clients at a lower cost of ownership of a solution that is easily managed by our clients. Vena’s rapid growth is due to our success in improving our clients’ business processes to increase efficiency, performance and drive true business value.

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