



Finance Analytics Unleashed: Building Powerful Dashboards with Vena and Power BI

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Vena Customer Connect: Toronto
Sep 19, 2024

Session Information:

Presenters:

Anzyl Chakravarty, Technical Project Lead, Prolytics Consulting Group

Exclusive Vena Insights Connector and Power BI Desktop Workshop:

Attend an exclusive session available only to Vena Customers attending the Vena Customer Connect: Toronto on September 19, 2024. This specialized workshop offers expert guidance on leveraging Vena Insights and Power BI to enhance your reporting capabilities and data visualization skills. Move from intermediate to advanced proficiency, mastering data modelling best practices, finance-specific measures, and building dynamic dashboards.

Don't miss this opportunity to advance your skills and lead in your field. Join us for a transformative one-hour hands-on session led by seasoned trainers, including Anzyl Chakravarty from ProLytics Group, and unlock the full potential of your financial data.

Learning Objectives:

By the end of this session, participants will be able to:

- Understand the role of digital transformation in finance and how tools like Power BI enhance financial reporting and analysis.
- Compare Vena Insights with the Power BI Connector to identify key differences and benefits for different reporting needs.
- Develop skills in accessing and preparing data within Vena and Power BI for accuracy and consistency.
- Gain familiarity with Vena data structures to optimize data management and reporting workflows.
- Learn best practices for data modeling to improve reporting accuracy and analytical capabilities.
- Apply common finance ratios and DAX formulas to conduct comprehensive financial analysis.
- Create effective data visualizations that clearly communicate financial insights.
- Build a comprehensive finance dashboard that consolidates key financial metrics and insights.
- Enhance skills in reporting, dashboarding, and sharing interactive reports with stakeholders.

What You Need for This Session:

- **Bring your own laptop, charger and mouse.**
- **Power BI Desktop on the laptop that you're bringing to the event.**

CPE-Eligibility:

To earn CPE credits the learner is expected to:

- Attend the entirety of the 1-hour session. Register your attendance and departure on the attendance sheets at the registration desk, including exits and re-entry during breaks.
- Complete all learning activities within the session.
- Complete session survey at the end of the session. *Survey submission is optional.*

CPE/ Vena Academy FAQs:

When and how will I receive my CPE/CPD Credits?

CPE/CPD credits will be delivered to your [Vena Academy profile](#) within 30 business days. Follow the instructions outlined in this [job aid](#) on how to access your CPE/CPD Certificates and credits.

What is Vena Academy?

Vena Academy is your centralized space for learning. Access our extensive content library containing courses about Vena Product Knowledge, Microsoft Training (i.e. Excel, PPT), and Professional Development courses designed for Finance Professionals.

Do I need to be a Vena Customer to register for a Vena Academy profile?

You do not need to be a current customer to register for Vena Academy. This resource is available to all Finance and Operations professionals, regardless of whether you are a current Vena user.

I don't have a Vena Academy profile. How do I create one?

Visit Vena Academy at <https://academy.venasolutions.com> and follow the prompts to create a free Vena Community profile. Enter your work email and password. Follow the instructions outlined in [this job aid](#) to create a Vena Community account and log into Vena Academy for the first time.

I waited 5-7 business days and my CPE/CPD credits are not available in my Vena Academy profile. What should I do?

First, check that you are logged into Vena Academy using your work email. If you require additional support, please email learning@venacorp.com.

National Association of State Boards of Accountancy (NASBA) Information Regarding CPE Credits for this Program

Number of CPE credits: 1.0 CPE credits for 50-minute session

Recommended NASBA Field of Study: Specialized Knowledge

Instructional Delivery Method: Group Live

Sponsor Identification number: 129667

Session Registration: To register for this session, go to:

https://www.venasolutions.com/events/toronto-user-group-september-2024?hs_preview=pZtApZUU-175833067679

Glossary: Refer to Vena Academy for instructions on accessing the glossary.

Course Date: September 19, 2024

Who Should Attend: Vena Customers

Program Level: Intermediate/Advanced

Prerequisite Education: None

Advanced Preparation: None

Interactive Engagement Element: None (high-profile speakers)

Official Registry Statement: Vena Solutions is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing on the National Registry of CPE Sponsors. State Boards of Accountancy have the final authority on the acceptance of individual courses for CPE credit. Complaints regarding sponsors may be submitted to the National Registry of CPE sponsors through its website: www.nasbaregistry.org.

If you undertake this course for CPE credits, you can leave final comments in the Course Survey.

Refund and Cancellation Policy

Refund, Cancellation Policy & Changes to Event Program

Cancellation by attendee: In the event that you wish to cancel your attendance at the Event, you must provide written notice to Vena. As there are no registration fees for the event, no refund of registration fees will be provided.

Cancellation by Vena: Vena reserves the right to cancel or reschedule the Event at any time for any reason. In the event of such cancellation or rescheduling, Vena will provide written notice to all registered attendees. As there are no registration fees for the event, no refund of registration fees will be paid.

Vena may (at its sole discretion) change the format (including, without limitation, from a physical in-person Event to a virtual Event and vice versa), speakers, participants, content, venue location and program, or any other aspect of the Event at any time and for any reason, whether or not due to a Force Majeure Event (as defined below), in each case without liability.

- (i) Force Majeure. Vena shall not be liable for any failure or delay in performing its obligations under these Terms to the extent that such failure or delay is caused by an event beyond its reasonable control, including but not limited to acts of God, natural disasters, government actions, labor disputes, or technical failures. In the Event of any such delay or failure, Vena shall be excused from its performance obligations for the duration of the Event and shall not be liable for any resulting damages or losses.

Complaint Policy

Attendee/session may lodge complaints through email to: learning@venacorp.com.

Once a complaint has been lodged:

1. Vena Solutions will document the complaint and share with our advisory committee.
2. Vena Solutions will set a for the committee to review.
3. Upon review, the committee will recommend and document a proposed resolution.
4. Vena Solutions will contact the aggrieved and the committee's resolution.



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