OpenCastLabs
opportunities for growth

2016

Advanced Report Development and Spreadsheet Modelling with MS Excel

"Quality Training: An opportunity for growth and Excellence"

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WE ARE HERE TO MAKE A DIFFERENCE

RE: Introductory letter for OpenCastLabs Limited

OpenCastLabs Limited partners with government and commercial clients to deliver professional services and technology solutions in the development social change; environment and infrastructure; health, human services, social programs; business processes and telecommunications markets. The firm combines passion for its work with industry expertise and innovative analytics to produce compelling results throughout the entire program life cycle, from research and analysis through implementation and improvement. Since 2006, OpenCastLabs has been serving government at all levels, major corporations, and multilateral institutions.

Staff of Senior Industry Veterans

We live this business every day and have for years. OpenCastLabs Consulting is made up of a team of certified experts in their areas of specialization who have worked in these areas for several years, in fact, collectively, our leadership team has more than 10 years capacity building experience – and we have the gray hair to prove it.

We maintain a roll of the best-in-class consultants who are experts in their subject areas which are but not limited to; Advanced Business applications training, Capacity building, Social & Market Research, Impact Evaluation & Monitoring Systems, Value Chains Analysis, Database Development, Report automation, Donor Funded Program Reporting, Custom Reporting and Report Development, Coaching & Mentoring of Monitoring & Evaluation teams among other areas.

The Perspective of Broad Experience

Our clients span a broad base of industries including Government, Non-Profits, Banking, Education, Financial institutions of all sizes and types. We are deeply involved with technology change and regulatory impacts on the industry. Our broad knowledge base means we understand the dynamics of your business as well as the economics of both sides of deals.

Long-Term Relationships Built on Results

We are proud of the long-standing relationships that are the hallmark of our client interactions. We earn the trust of our clients by bringing a broad perspective, objective opinions, fresh creative thinking and honest answers. We help our clients think through options and the implications. In the end, our relationships with our clients are based on results that are both significant and sustainable.

Joab Ngai
Head of Business

Unlocking Our Potential-Strategy 2016-2017

Our Challenges & Opportunities

Market	Participants	Employees	Society
• Liberalization • Globalization • Scarcity resources • Green revolution of products and services • Fast growing regional economies • Internet of things • Government regulation • Increase pressure on compliance requirements	• New Delegates requirements in terms of customization, simplicity, convenience,transparency and speed driven by the digital revolution • Environmentally friendly and consciencetious deliverables • Need for scalable,industry-specific solutions • New generation of well-informed participants expecting higher level of flexibility.	• Lack of high qualified people key impediment for growth (War for Talent") • Professional education and people development key driver for growth • Working conditions for older employees • Increasing expectations regarding strong leadership and corporate culture • Corporate Responsibility as an increasingly important factor to attract and retain employees	• New public expectation regarding corporate contributions to solve global problems • Corporate Responsibility seen as obligation, not just "Nice to have" • Increasing importance of sustainability and publice reputation for long-term success • Increase economic divide and social umrest creating new challenges for organizations
➢ Extraordinary new training growth opportunities	➢ Reducing complexity critcal for participants loyalty	➢ Comprehensive people empowerment and engagement critical for growth	➢ Corporate Responsibility integral part of business model

OUR GUIDING PRINCIPLES

Respect & results

What we do is found on our guiding principles of Respect & results. We show respect to our delegates, our employees, partners and the society in which we operate by understanding their needs and meeting their expectations.

OUR GUIDING PRINCIPLES

Organization's engaging Opencastlabs services has respect for our values of independence, integrity and partnership. Our reputation for quality is based on the use of the best available research, knowledge and expertise

OUR PURPOSE

We connect people. Improving their lives

**MISSION STATEMENT**
East Africa's leader in Capacity Development

MISSION
In line with our Mission Statement, we at OpenCastLabs
- **Provide a comfortable training environment for participants.**
- **Form partnership with world class professional trainers to impact cutting edge knowledge onto participants.**
- **Encourage participatory learning and professionalism.**

OUR ASPIRATION

Our 3 Bottom Lines & living Responsibility

PROVIDER OF CHOICE

LIVING RESPONSIBILITY

INVESTMENT OF CHOICE

EMPLOYEE OF CHOICE
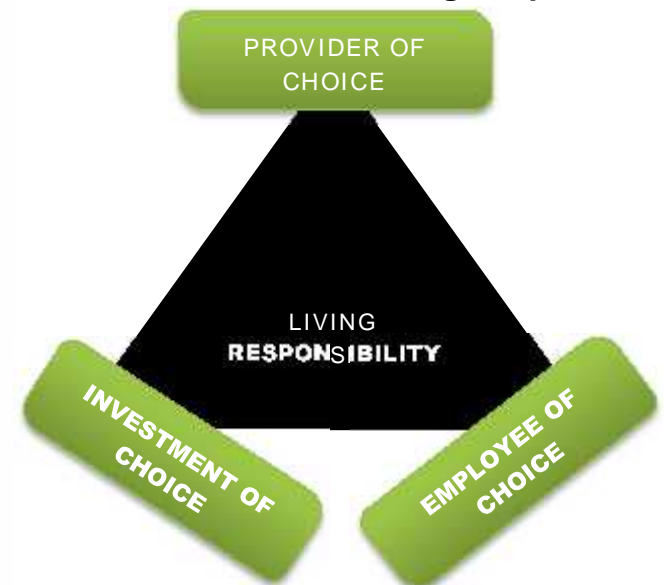
- *We are strongly centred on our clients*
- *We are sincerely dedicated to our people*
- *We are solidly focused financial success*

A SAMPLE OF OUR CLIENTELLE

Advanced Report Development and Spreadsheet Modelling with MS Excel

EXECUTIVE SUMMARY

Excel has a number of useful built in functions, but there are also some caveats about its computations. For this reason and to facilitate more flexibility, in this course we shall demonstrate some handcrafted techniques to help the delegates manage large data sets and improve their reporting efficiency.

The course sessions shall focus on how to effectively and efficiently utilize Microsoft Excel for data management, modeling and projection with a positive bias to lookups. Users will not only use Excel to build models, but also to crunch a large data dump. Learn how to minimize as much manual labor as possible, thereby saving time and performing more detailed analysis and projections quickly. Apply commonly-used formulas in new and different ways; uncover often over-looked Excel features; streamline number crunching with pivot tables, functions, arrays, Data tools, Formatting, Macros and VBA programming.

Course Description:

This course shows how spreadsheets can be used to enhance management reporting.
The course shows how to analyze and review data extracted from ERP systems and databases in order to prepare management reports, including using Excel's graphing capabilities. The course studies Excel's functions and how to use these effectively. The program also shows how to access the Visual Basic Editor and use macros and user defined functions in order to enhance Excel's functionality. Half a day will also be spent showing attendees how to use Excel's pivot table functionality. Pivot tables are often poorly understood and yet are the most powerful feature in Excel. A basic pivot table will allow you to summarize 50,000 rows of data in 30 seconds.

The course is highly practical: delegates will be exposed to examples (in Microsoft Excel) throughout the course.

Methodology

The course is highly interactive, and formal lecture content is kept to a minimum. Spreadsheet techniques are explained and demonstrated by using extensive case studies, adhering closely to real life examples. Throughout the program emphasis is laid on the importance of reality-checking and the dangers of spreadsheet blindness, on a fundamental understanding of key issues and on

the skills of communicating conclusions from spreadsheet techniques to colleagues and partners. Delegates will be expected to be highly participative and motivated to learn, and to express their needs and priorities clearly.

Knowledge Pre-Requisites

Attendees will be expected to be using Excel in the context of a reporting related role and be comfortable with using Excel for data entry. A basic knowledge of Excel 2007 and later will therefore be assumed, but if delegates need a refresher on specific items then, time permitting, the course director will try and meet their needs. The course is also suitable for all senior professionals who may not have had specific spreadsheet training in reporting, analysis, modeling and forecasting, who have developed their skills over time and who would like to develop a broader knowledge of what Excel can offer, as well as reassurance about their existing spreadsheet techniques.

Candidates ideally should bring their own computers with Excel 2007 or later loaded in order to benefit from the course

Course Details:

1. A look at the rear-view of Microsoft Excel
   - Customize the Excel Environment
   - Customizing Workbooks
   - Create and Use Templates
   - Using Excel Options
   - Understanding Formula Iteration and iterative calculation
   - Manual & Automatic calculation using F9

2. Preparing Excel for printing
   - Automating print sizes and orientations

3. Excel Navigation convenience

4. Working with Range names
   - Naming of range data
   - Professionalizing selection of range data

5. Working with Multiple Workbooks
   - Create a Workspace
   - Consolidate Data
   - Link Cells in Different Workbooks
   - Edit Links

6.   Working with External Data

- Importing Data from Access Databases
- Import Text Data into Excel

7.   Introduction to Dashboards

- Data Validation
- Controlling what gets into cells
- Using form tool on Ribbon
- Using Custom Lists
- Working with Cells (Controlled cell selection)

- Share a Workbook
- Set Revision Tracking
- Protect Files

8.   Forecasting and charting

- Inserting chart Trendline
- Choosing the right Trendline for the right data
- Linear forecasting
- Relationship equations for projection
- Using Excel for Budgeting
- Budgeting best practices
- Building & Linking Budgets

9.   Managing Pivot Table Data

- Pivot tables concept elaborated
- Pivot table fundamentals
- Creating a basic pivot table
- Customizing pivot tables
- Formatting pivot tables
- Pivot table calculations
- Pivot charts
- Review of developing reporting using Macros

- Pivot Tables using External Data
- Introduction to Charts & Graphs
- Charts & Graphs best practices
- Displaying 2 charts in the same graph
- Adding custom pictures in graphs

10. Excel Business Modeling
- Using What-If Analysis
- Working with Goal Seek
- Using Solver for Advanced Business Modeling

11. Excel Data Analysis
- Excel Data Analysis
- Excel Data Analysis Functions
- Regression and descriptive statistics

12. Formulas & Functions
- Formulae fundamentals
- Formula Auditing and Error evaluation
- Text functions
- Date functions
- Date and time functions
- Financial functions
- Statistical functions
- Math functions
- Lookup and reference functions
- Database functions
- Information functions
- Logical functions
- Array formulae

13. Macros and VBA programing

- Introduction to macros
- Recording a macro
- Automating Excel with macro objects

14. The LookUPs

- The building blocks of Lookup Functions
- Introducing VLOOKUP
- Single value lookup
- The exact match
- Approximate match
- VLOOKUP #N/A IFFEROR and IF
- VLOOKUP and Data Validation
- CONCATENATing VLOOKUPs
- VLOOKUP and Named Ranges
- VLOOKUP as a formula element
- Horizontal Lookup
- VLOOKUP with table on different sheet
- VLOOKUP with table in different workbook
- Numbers above column header
- VLOOKUP and COLUMNS function
- VLOOKUP and ROW function
- MATCH
- Two values Lookup: Joining columns
- Two values Lookup with CHOOSE
- Partial text LOOKUP with LEFT and SEARCH
- IF
- NESTED IFS
- IF OR
- IF AND
- SUMIFS
- AVERAGEIFS
- COUNTIFS