

Context

For its different reporting cycles (actuals, forecast & budget) Ageas produces an impressive board pack that links data from Excel into very advanced PowerPoint graphs. The output is very effective and professional looking, but the mechanism is not always efficient in maintenance.

Project Scope

The official data set to be used for this board-pack is delivered by another department to Performance Management. As all data is stored in Excel sheets, links were created between this source data-set ("source cells") and extra worksheets on which the data ("target cells") are reported and analysed so it can be used for graphs. Subsequently received data-set updates required re-linking source and target cells and thus also the checking of correctness and integrity of all data and graphs. This mechanism was though well functioning rather **time-consuming**, manipulation error sensitive and hardly transparent for any other user than the creator. This project had to make these subsequent updates of the source-data more efficient, more robust, error free and transparent for any co-worker in the PM department. Also extending the output in Excel and in PowerPoint should be straightforward and guarantee a persistent manner of working. A final requirement was the documentation of the mechanism to serve as a guideline for the administrator.

Project Solution Concept

A solution was chosen where all target data were centralized into a single Excel file ("masterfile"); containing also all the graphs ready for use PowerPoint. The bulk of the source data is delivered in a separate Excel file.

Client

Name: Ageas, Belgium
Department: (PM)
 Performance Management



Excel Implemented Features

Feature	Advantage
✓ One push-on-the-button switch between two datasets	Ease of maintenance, speed and less errors due to manipulation
✓ Transparent lookup system of values from underlying dataset	Much greater consistency
✓ Flag areas in Excel visually by purpose	Transparency of maintenance, less risk.
✓ Centralized control of period parameters	Ease of change
✓ Log usage of Excel master	Control changes

Powerpoint Implemented Features

Feature	Advantage
✓ List all links used into a textfile	Selfcontrol and consistency
✓ Change links from one Excel to another one	Allowing fast changes
✓ Count links	Selfcontrol and file consistency
✓ Automated multiplication of presentation into segment presentations (semi automatic)	Time saver
✓ Reassemble of segment presentations into one (fully automatic)	Time saver
✓ Visual indication of data source	Awareness