



PST TRAINING (PTY) LTD

PST Training (Pty) Ltd

Physical Address: Montrose Place, 2nd Floor, 2 Bella Rosa Street, Rosenpark, Bellville, 7500

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MS Excel Super User (Expert)

Overview

This one-day MS Excel Super User (Expert) course is designed for advanced Excel users who are ready to master specialised functions, advanced data manipulation techniques, and interactive spreadsheet tools. The programme covers complex formulas, advanced filtering with macros, powerful lookup functions, and form controls for dynamic charts and PivotTables.

Participants will gain hands-on experience with advanced logic, text, date, and statistical functions, while also exploring automation techniques and form-driven interactivity. This training enables delegates to design robust, efficient, and highly functional spreadsheet solutions for complex business needs.

Objectives

- Use Paste Special operations for advanced data manipulation.
- Apply and combine multiple text functions for data formatting and transformation.
- Work with date and time functions for scheduling, calculation, and analysis.
- Apply advanced logical and statistical functions, including IF, AND, OR, COUNTIF(S), SUMIF(S), SUMPRODUCT, INDEX, and MATCH.
- Perform advanced filtering using macros.
- Use additional lookup functions and mathematical functions like CEILING and FLOOR.
- Create and manage form controls to enhance charts and PivotTables.

Course Prerequisite

Successful completion of MS Excel (Advanced) and full competence in all concepts covered in that course.

Language of Delivery

English

Delivery Methods

Facilitated by a competent and experienced subject matter trainer using practical, experiential techniques such as questions, discussions, demonstrations, exercises, and assessments.

Who should attend?

This course is ideal for highly skilled Excel users seeking to develop specialised, interactive spreadsheet solutions, including:

- Data Analysts and Reporting Specialists
- Business Intelligence Practitioners
- Advanced Financial Modellers
- Senior Administrative Professionals
- Anyone creating advanced spreadsheet tools for business operations

Course Outline

This course consists of the following 7 modules

Module 1	Excel Add-ins and Paste Special Operations • Overview of Excel Add-ins • Description and Use of Paste Special • Understanding Paste Special Operation Commands
Module 2	Advanced Text Functions • CONCATENATE Function • TEXT Function • CHAR Function • LEFT, RIGHT, and MID Functions • EXACT Function • Nesting TEXT, CHAR, LEFT, RIGHT, and MID with CONCATENATE
Module 3	Date and Time Functions • DATE Function • Combining LEFT, RIGHT, and MID with DATE • NETWORKDAYS Function • DAY, MONTH, and YEAR Functions • DATEDIF Function (Calculating Ages) • ROUNDDOWN and ROUNDUP Functions

Module 4	Advanced Logical and Statistical Functions • AND and OR Functions • Nesting AND/OR with IF • COUNTIF and SUMIF Functions • COUNTIFS and SUMIFS Functions • SUMPRODUCT Function • IFERROR Function • INDEX and MATCH Functions • Troubleshooting MATCH • Nesting INDEX and MATCH • CHOOSE Function • Worksheet Expiry Techniques
Module 5	Advanced Filtering with Macros • Understanding Advanced Filters • Extracting Specific Fields to the Same Sheet • Extracting Data to a Different Sheet • Recording a Macro to Automate Extraction
Module 6	Additional Lookup and Mathematical Functions • Using LOOKUP Functions (Vector and Array Options) • CEILING Function • FLOOR Function
Module 7	Form Controls for Interactive Dashboards • Adding the Developer Tab • ActiveX vs. Form Controls • Creating Combo Boxes and List Boxes • Creating Group Boxes and Option Buttons • Creating Spin Buttons • Using INDEX with Form Controls • Creating and Renaming Check Boxes • Using Check Boxes to Toggle Chart Series On/Off

Additional Information

Duration	1 Day	
Includes	• Comprehensive Manual • Lunch & Refreshments (not applicable to on-site / online training)	• Electronic Certificate (on successful completion of the course) • Electronic Delegate Feedback Questionnaire



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MS Excel Power Pivots & Power Queries

Overview

This one day course introduces Power Pivot and Power Query, Excel's advanced data analytics tools. Participants learn how to bring together data from multiple sources, build robust data models and perform sophisticated transformations. Through hands on exercises, delegates will consolidate and relate data tables, write DAX calculations, and transform data using Power Query. By the end of the course, they will be able to design interactive dashboards and reports that reveal insights and support data driven decision making.

Objectives

- Grasp core database concepts, including tables, relationships and keys.
- Enable and navigate the Power Pivot add in.
- Import data from relational databases, text files and other external sources.
- Create, name and organise tables in the internal data model.
- Build relationships between tables and manage them within Power Pivot.
- Write calculated columns and measures using DAX (Data Analysis Expressions).
- Use Power Query to clean, transform and shape data.
- Build interactive dashboards and reports using PivotTables, slicers and timelines.
- Combine and merge multiple queries to produce comprehensive datasets.

Course Prerequisite

MS Excel (Intermediate)

Language of Delivery

English

Delivery Methods

Facilitated by a competent and experienced subject matter trainer using interactive, experiential techniques such as questions, discussions, demonstrations, exercises, and assessments.

Who should attend?

The course is ideal for professionals who handle large amounts of data and need to create meaningful reports and dashboards, such as:

- Business Analysts and Data Analysts
- Financial Analysts and Accountants
- Business Intelligence Developers
- Operations Managers and Project Managers
- Reporting Specialists and MIS professionals
- Department heads and senior staff involved in data driven decision making

Course Outline

This course consists of the following 10 modules	
Module 1	Thinking Like a Database • Database terminology • Understanding tables and relationships
Module 2	Power Pivot Fundamentals • Activating Power Pivot • Linking Excel tables to Power Pivot • Preparing and adding tables to the data model • Creating and managing relationships
Module 3	PivotTables and Slicers • Creating and refreshing PivotTables • Changing report layouts and hiding subtotals • Filtering data with slicers and timelines
Module 4	Loading Data into Power Pivot • Importing data from databases, Access, text files and other sources • Refreshing and managing external data connections
Module 5	Managing Tables and the Data Model • Creating and naming tables • Feeding the internal data model directly • Adding and removing tables • Building PivotTables from the internal data model • Managing multiple external data tables

Module 6	Enhancing Data with Calculations • Creating calculated columns • Using DAX functions for advanced calculations • Referencing fields from other tables • Building calculated measures • Exploring cube functions
Module 7	Power Query Basics • Starting queries and understanding query steps • Using the advanced Query Editor • Managing existing queries and column actions
Module 8	Importing Data via Power Query • Importing data from workbooks, CSV, text and XML files • Getting data from folders and database systems • Connecting to non standard databases via ODBC
Module 9	Data Transformation Tasks • Removing duplicates and filling blank fields • Concatenating columns and changing text case • Finding and replacing text; trimming and cleaning • Extracting substrings • Splitting columns and pivoting/unpivoting data • Creating custom columns and converting data types • Adding conditional logic; grouping and aggregating
Module 10	Combining Queries • Reusing query steps • Appending data • Merging queries

Additional Information

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MS Excel Dashboard Report Design

Overview

This one day course teaches delegates how to design and build interactive dashboards in Excel that communicate complex information clearly. Participants will explore dashboard design principles, learn how to model data effectively, and harness advanced functions such as VLOOKUP, HLOOKUP, SUMIF, SUMPRODUCT and CHOOSE. The course covers building PivotTables, creating a variety of charts, using drop down lists and Sparklines, and incorporating form controls to filter data. Learners will leave with the ability to create professional dashboards that support fast, informed decision making.

Objectives

- Master dashboard design principles and data modelling best practices.
- Use functions (VLOOKUP, HLOOKUP, SUMIF, SUMPRODUCT, CHOOSE) to prepare data for analysis.
- Create and customise PivotTables that feed the dashboard.
- Design charts, including dual axis charts and advanced chart types.
- Develop dynamic drop down lists and dependent lists.
- Add Sparklines to display trends within cells.
- Apply conditional formatting to create data alerts.
- Use form controls (combo boxes, list boxes, checkboxes) to allow user interaction.
- Secure your dashboards by protecting worksheets and workbooks.

Course Prerequisite

Intermediate knowledge of Excel; no prior experience with PivotTables is necessary.

Language of Delivery

English

Delivery Methods

Facilitated by a competent and experienced subject matter trainer using interactive, experiential techniques such as questions, discussions, demonstrations, exercises, and assessments.

Who should attend?

Ideal for managers and professionals who need to design and present data visually, such as:

- Finance Managers and Analysts
- Marketing and Sales Managers
- Operations Managers and Project Managers
- Business and Data Analysts
- Senior Administrators and Report Developers
- Professionals handling large datasets or complex calculations

Course Outline

This course consists of the following 7 modules

Module 1	Introduction to Dashboards • Purpose and benefits of dashboards • Establishing user requirements and data sources • Dashboard design principles • Developing your data model and best practices
Module 2	Functions and Data Models • Using VLOOKUP, HLOOKUP, SUMIF, SUMPRODUCT and CHOOSE functions • Applying these functions within a data model • Creating drop down lists and dependent lists • Converting ranges to Excel tables and using smart tables
Module 3	PivotTables for Dashboards • Creating PivotTables and exploring summary functions • Adding calculated fields and items • Editing and deleting calculated fields and items • Renaming fields and using GetPivotData
Module 4	Charting Fundamentals • Selecting appropriate chart types • Changing colours, borders and number formats • Customising axes and using advanced chart features • Designing dual axis charts • Removing unnecessary chart elements

Module 5	Advanced Charting • Charting non contiguous ranges • Charting data from different sheets • Working with multiple axes
Module 6	Validation, Lists and Sparklines • Using the CHOOSE function with data validation • Creating and testing dependent drop down lists • Creating lists from a series of numbers • Building and formatting Sparklines • Applying conditional formatting to create alerts
Module 7	Form Controls and Security • Using form controls (combo boxes, list boxes, checkboxes) • Employing the INDEX function to drive controls • Renaming controls and sharing dashboards externally • Limiting access to specific worksheet ranges • Protecting the workbook structure

Additional Information

Duration	1 Day	
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Microsoft Power BI

Overview

This one day course is an introduction to Microsoft Power BI, a cloud based analytics service used to turn data into interactive insights. Participants will learn how to connect to various data sources, transform data using Power Query, build data models with DAX, and create compelling reports and dashboards.

The course also covers sharing and collaborating with Power BI and best practices for performance and security. Learners will leave with the skills needed to build end to end BI solutions.

Objectives

- Understand the architecture and components of Power BI.
- Connect to Excel files, databases, web services and other data sources.
- Use Power Query to filter, shape and transform data.
- Create relationships and build data models.
- Write DAX expressions to create calculated columns and measures.
- Design interactive reports and dashboards using a variety of visualisations.
- Publish reports and dashboards and share them with others.
- Apply optimisation techniques to improve report performance.

Course Prerequisite

MS Excel Intermediate

Language of Delivery

English

Delivery Methods

Facilitated by a competent and experienced subject matter trainer using interactive, experiential techniques such as questions, discussions, demonstrations, exercises, and assessments.

Who should attend?

This course benefits anyone who needs to analyse, visualise or share data insights, including:

- Data Analysts and Business Intelligence Professionals
- IT Professionals involved in data integration
- Finance and Accounting Professionals
- Project Managers and Operations Managers
- Marketing and Sales Analysts
- Consultants, Business Advisors and Management Staff

Course Outline

This course consists of the following 5 modules

Module 1	Introduction to Power BI • Overview of the Power BI ecosystem • Database terminology and relationships • Using Power BI Desktop • Connecting to and cleaning data • Creating relationships between tables
Module 2	Power Query for Data Transformation • Understanding query steps and data flows • Removing duplicates and empty fields • Concatenating columns and changing case • Finding, replacing and cleaning text • Splitting columns; pivoting and unpivoting • Importing data from folders
Module 3	Data Modelling with DAX • Writing DAX formulas for calculated columns • Building DAX driven measures and calculated tables • Referencing related tables

Module 4	Visualisation and Reporting • Creating charts, tables and cards • Using slicers and cross filtering • Customising themes and formatting visuals • Applying conditional formatting and tooltips
Module 5	Collaboration and Performance • Publishing and sharing reports and dashboards • Creating live dashboards with tiles and alerts • Optimising data models and reports for performance

Additional Information

Duration	1 Day	
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Microsoft Power BI (Dax Formulas)

Overview

This one-day advanced course builds on the foundational skills covered in Power BI (Level 1). Participants will deepen their understanding of DAX formulas, data modelling and advanced reporting techniques. The course introduces calculated columns and measures, advanced time intelligence functions and the creation of dynamic, automated reports. Learners will also gain experience designing measures tables and optimising their data models for enhanced performance and analysis.

By the end of the course, delegates will be able to create robust, professional Power BI reports that support HR, Payroll, Training and other business functions with accurate, interactive data insights.

Objectives

Participants will learn to:

- Generate and manage Date Tables using DAX, CALENDAR and CALENDARAUTO.
- Apply advanced DAX date and time functions such as DAY, MONTH, YEAR, WEEKDAY, WEEKNUM and QUARTER.
- Use calculated columns and measures to enhance data models.
- Implement logical and conditional formulas using IF, AND, OR, SWITCH and nested functions.
- Employ X-functions (SUMX, AVERAGEX, COUNTX, MINX, MAXX) for iterative calculations.
- Apply filter and ranking functions such as ALL, REMOVEFILTERS, ISBLANK and RANKX.
- Create time-based measures like Year-to-Date, Prior-Year and Opening Balance calculations.
- Build and maintain a Measures Table to streamline reporting.
- Optimise calculations and prepare data models for efficient, interactive reporting.

Course Prerequisite

Power BI (Level 1) or equivalent experience

Language of Delivery

English

Delivery Methods

Facilitated by a competent and experienced subject-matter trainer using interactive, experiential techniques such as questions, demonstrations, discussions and hands-on exercises.

Who should attend?

This course is designed for users who already have basic knowledge of Power BI and want to perform advanced data modelling and analytical reporting. It is especially beneficial for:

- Data Analysts and Business Intelligence Professionals
- HR and Payroll Analysts
- Training and L&D Managers
- Finance, Accounting and Operations Managers
- Project Managers and Business Advisors

Course Outline

This course consists of the following 4 modules

Module 1	Date Tables • Generate Date Tables using DAX, CALENDARAUTO, and CALENDAR • Apply DAY, MONTH, YEAR, WEEKDAY, WEEKNUM, and QUARTER functions • Create combined fields: Month & Year, Quarter & Year • Use TODAY and DATEDIFF to calculate ages and durations • Apply EDATE for date offsets
Module 2	Calculated Columns and Functions • Create Calculated Columns • Use DIVIDE, RELATED, and RELATEDTABLE functions • Build formulas with IF, AND, OR, and SWITCH logic • Apply SUMX, AVERAGEX, COUNTX, MINX, and MAXX for advanced calculations • Combine text fields using CONCATENATE
Module 3	Calculated Measures and Advanced DAX • Create Calculated Measures using IN, ALL, and REMOVEFILTERS • Develop measures for Total Sales, YTD Sales, Prior Year Sales, and Fiscal YTD • Apply RANKX and ALLSELECTED for ranking and top-N analysis • Calculate Opening Balances and Weekday Sales using LASTDATE and LASTNONBLANK

Module 4	Measures Table Management • Create a dedicated Measures Table • Save, edit and delete measures • Organise measures into folders for efficient navigation
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