PAD SYNERGY CONSULTANCY SDN BHD
HRD CORP REGISTERED TRAINING PROVIDER

DATA ANALYTICS & AI TRAINING PROGRAMME

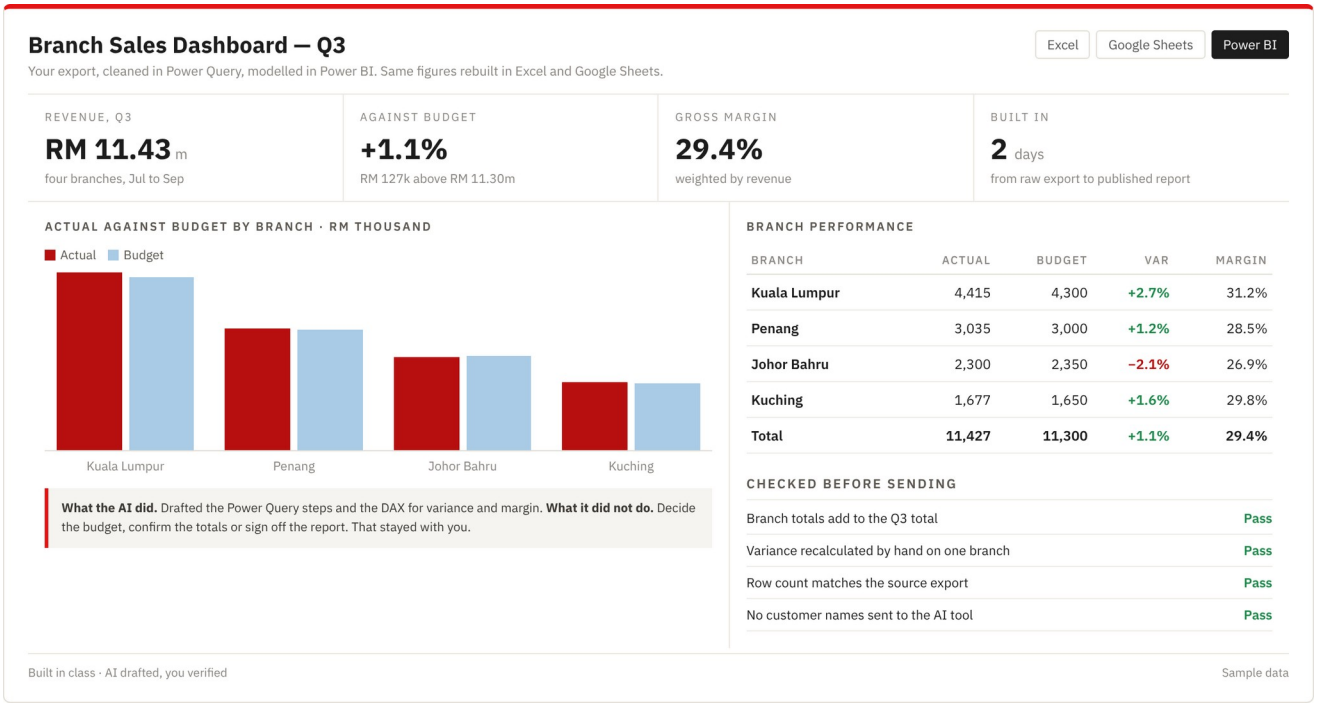
AI-Powered Dashboards with Excel, Google Sheets and Power BI

Bring your own data. Build your dashboard in 2 days, with ChatGPT or Claude as your assistant.

DURATION	MODE	LEVEL
2 Days (14 Hours)	**In-house or Public Training**	**Intermediate to Advanced**

STEP 1	STEP 2	STEP 3	STEP 4	STEP 5	STEP 6
Clean	**Formulas**	**Analyse**	**Model**	**Dashboard**	**Publish**

WHAT YOU WILL HAVE BUILT BY THE END OF DAY 2



Example only. Built from the sample data used in class. You build the same thing on your own data.

TOOLS YOU WILL USE

Claude · ChatGPT · **Microsoft Excel · Google Sheets · Power BI Desktop**

Bring a paid ChatGPT or Claude account. Trademarks belong to their owners. No affiliation or endorsement implied.

01 Programme Overview

- Take your own data from raw export to a finished dashboard in 2 days.
- Clean it, analyse it in Excel and Google Sheets, then build and publish it in Power BI.
- ChatGPT or Claude drafts the formulas and DAX. You check every number.

> **Bring your own data. Leave with your own dashboard in 2 days.**

02 Learning Objectives

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

- Use ChatGPT or Claude to draft formulas and DAX, and check the result.
- Clean and combine data with Power Query.
- Use advanced formulas: SUMIFS, XLOOKUP, FILTER, UNIQUE.
- Build an Excel dashboard with PivotTables and slicers.
- Build a live Google Sheets dashboard with IMPORTRANGE.
- Build a Power BI model and DAX measures (YTD, budget vs actual).
- Publish and share a dashboard safely under PDPA.

03 Training Methodology

- ☐ Bring your own data. Sample data provided if needed.
- ☐ Trainer shows first, then you do it.
- ☐ AI drafts, you check.
- ☐ One data set from Day 1 to Day 2.
- ☐ Reference sheet and prompt library to take home.
- ☐ Open clinic at the end for your own work problems.

DAY 1 Clean, calculate and analyse in Excel and Google Sheets

MODULE 1 Your AI Assistant for Data Work

- ☐ Paid ChatGPT and Claude: what each one does well with data
- ☐ Uploading a file against pasting a sample of the data
- ☐ Writing a data prompt: the table, the question and the output you want
- ☐ Asking AI to show its steps so you can check them
- ☐ Testing every AI answer on a row you can check by hand
- ☐ PDPA and company rules: what must never be uploaded
- ☐ Removing names, IC numbers and account details before data goes to AI
- ☐ Starting your own prompt library for the 2 days

HANDS-ON ACTIVITY

- ☐ Set up your AI account and a project for the programme
- ☐ Ask AI to summarise your own export, then check three figures by hand

MODULE 2 Data Cleaning with Power Query

- ☐ Data types: number, date and text, and why they matter
- ☐ Removing duplicates, errors, blanks and stray spaces
- ☐ Splitting, merging and unpivoting columns
- ☐ Appending a folder of monthly files into one table
- ☐ Recording the steps so next month is a refresh
- ☐ The same clean-up in Google Sheets: TRIM, SPLIT and data validation
- ☐ Using AI to work out a transformation you cannot picture
- ☐ Record counts before and after cleaning

HANDS-ON ACTIVITY

- ☐ Clean your own export and confirm no records were lost
- ☐ Add a new month of data, refresh, and confirm nothing breaks

MODULE 3 Advanced Formulas in Excel and Google Sheets

- ☐ IFS, SUMIFS, COUNTIFS, MAXIFS and MINIFS
- ☐ XLOOKUP, and INDEX with MATCH where XLOOKUP is not available
- ☐ FILTER and UNIQUE for results that update by themselves
- ☐ ARRAYFORMULA in Google Sheets
- ☐ TEXTJOIN and text functions for codes and IDs
- ☐ Describing a formula to AI so it comes back usable
- ☐ Reading an AI-written formula before you trust it

HANDS-ON ACTIVITY

- ☐ Build a summary by branch and month, then compare it with AI's version
- ☐ Replace a nested IF with IFS and confirm the results match exactly

MODULE 4 PivotTable Analysis and the Excel Dashboard

- ☐ PivotTables that answer one business question
- ☐ Grouping dates into months and quarters
- ☐ Calculated fields, percentage of total, running totals and rank
- ☐ Choosing the chart: column, bar, line or combination
- ☐ Slicers connected to every PivotTable
- ☐ KPI cards, trend and breakdown on one page
- ☐ Formatting for management, and keeping it to one page that prints

HANDS-ON ACTIVITY

- ☐ Build a one-page Excel dashboard from your own data
- ☐ Connect the slicers and check every visual responds together

DAY 2 Share it live, model it in Power BI and publish

MODULE 5 Live Dashboard in Google Sheets

- ☐ IMPORTRANGE to pull data live from other files
- ☐ Combining branch or department files into one report
- ☐ Pivot tables, charts and slicers in Google Sheets
- ☐ Protecting ranges so only input cells can be changed
- ☐ Sharing settings: viewer, commenter and editor
- ☐ Version history, and keeping one reliable version
- ☐ Using AI to write Sheets formulas and fix errors

HANDS-ON ACTIVITY

- ☐ Feed a dashboard from three files with IMPORTRANGE
- ☐ Change a figure in a source file and confirm the dashboard updates

MODULE 6 Power BI Data Model

- ☐ Connecting Power BI to Excel, CSV and a folder of files
- ☐ Fact and dimension tables, and the star schema in plain terms
- ☐ Relationships, cardinality and filter direction
- ☐ A calendar table, marked as the date table
- ☐ Bringing budget data into the model
- ☐ Keeping the model small and fast
- ☐ Asking AI to review your model and find what is missing

HANDS-ON ACTIVITY

- ☐ Build a model from your own cleaned tables
- ☐ Test that a filter flows in the right direction

MODULE 7 DAX Measures with AI

- ☐ Calculated column against measure, and when to use each
- ☐ SUM, DISTINCTCOUNT and DIVIDE
- ☐ CALCULATE and filter context, explained simply
- ☐ Year-to-date, same period last year and month-on-month
- ☐ Budget against actual variance, in value and percentage
- ☐ Asking AI to draft a measure, then testing it on a figure you know
- ☐ Naming and display folders so the model stays readable

HANDS-ON ACTIVITY

- ☐ Build revenue, cost, margin and year-to-date measures
- ☐ Build a budget against actual variance with good and bad indicators

MODULE 8 Publish, Share and Present Your Dashboard

- ☐ KPI cards, drill down and drill through
- ☐ Titles that state the finding, not the field name
- ☐ Syncing slicers across report pages
- ☐ Publishing to the Power BI service and setting scheduled refresh
- ☐ Sharing securely, and PDPA once a report leaves your laptop
- ☐ Choosing the right tool: Excel, Google Sheets or Power BI
- ☐ Capstone: your data, your dashboard, every figure checked

HANDS-ON ACTIVITY

- ☐ Publish your dashboard with a drill-through page
- ☐ Present it in three minutes and show how each figure was checked

05 Target Participants

This programme is suitable for:

- ☐ Executives and analysts who prepare monthly management reports
- ☐ Finance and accounts staff working with large exports and reconciliations
- ☐ Operations, sales and branch staff who combine data from several locations
- ☐ Heads of department who track KPIs, cost, sales or production
- ☐ Advanced Excel users moving into Power BI and reporting roles
- ☐ Teams that report in both Microsoft Excel and Google Sheets
- ☐ Anyone who rebuilds the same report by hand every month

06 What You Need to Bring

- ☐ **Your own data.** One real export from your own system in Excel or CSV, plus a second file that relates to it (products, branches or budget). Personal details removed. Sample files provided if yours cannot leave the office.
- ☐ **A paid ChatGPT or Claude account.** ChatGPT Plus or Claude Pro, or a company plan. Free plans run out during a full day of data work.
- ☐ **A Windows laptop, not a tablet.** Microsoft 365 or Excel 2021, and Power BI Desktop installed. Power BI Desktop is free from Microsoft and does not run on Mac. We send the link before the programme.
- ☐ **A Google account** you can sign in with, company or personal, and the three questions your management asks about performance.

07 Expected Training Outcome

You leave with your own dashboard, built on your own data in 2 days: a Power Query clean-up that refreshes, an Excel dashboard, a live Google Sheets report and a published Power BI report with measures you wrote and can explain. You also leave with a prompt library and a checking routine, so you know which figures AI can draft and which ones you must prove yourself. For the company, management reporting becomes faster, consistent every month and no longer dependent on one person's spreadsheet.

100% HRD Corp claimable. Applications should be submitted at least 14 days before the training dates.