



PST TRAINING (PTY) LTD

PST Training (Pty) Ltd

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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

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