PAD SYNERGY CONSULTANCY SDN BHD
HRD CORP REGISTERED TRAINING PROVIDER

MICROSOFT OFFICE TRAINING PROGRAMME

Microsoft Office 365 Excel Advanced with Data Analysis, Reporting & Automation

Working with Microsoft Copilot and other AI tools to analyse, report and automate

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

STEP 1	STEP 2	STEP 3	STEP 4	STEP 5	STEP 6
Formulas	**Pivots**	**Metrics**	**Dashboards**	**Clean**	**Automate**

WHAT YOU WILL HAVE BUILT BY THE END OF THE PROGRAMME

Channel Analysis — FY2026

Built with AI assistance in Excel, then checked line by line against the source

Analysis | Pivot | Source data

REVENUE ANALYSED	Q1 TO Q4 GROWTH	FASTEST GROWING	TIME TO BUILD
RM 11.12 m	+18.9%	Online store	25 min
12,636 units, four channels	across all channels	+50.4% on units	checked against source after

WHAT WAS ASKED, AND WHAT CAME BACK

YOU TYPED

Summarise revenue by channel and quarter from this table, add a percentage of total column, and tell me which channel grew fastest.

WHAT YOU GOT BACK

A PivotTable grouped by channel and quarter, with a percentage-of-total column and a growth calculation. The suggested formula for the growth column was:

```
=(XLOOKUP($A2,Channel,Q4)-XLOOKUP($A2,Channel,Q1))/XLOOKUP($A2,Channel,Q1)
```

CHANNEL PERFORMANCE

CHANNEL	REVENUE	UNITS	SHARE
Direct sales	RM 4,986,240	5,088	44.9%
Dealer network	RM 3,028,480	3,584	27.2%
Online store	RM 1,658,500	2,675	14.9%
Corporate accounts	RM 1,443,680	1,289	13.0%

The part that matters. Every figure above was checked against the source table before the report was sent. AI wrote the formula. You still own the number.

REVENUE BY QUARTER



CHECKED BEFORE SENDING

Channel totals add to the grand total	Pass
Percentages add to 100	Pass
Growth recalculated by hand on one row	Pass
Row count matches the source file	Pass
No customer names sent to the AI tool	Pass

What the AI did. Drafted the PivotTable layout, wrote the growth formula, suggested the chart type. **What it did not do.** Decide which numbers matter, confirm the totals, or approve the report. That stayed with you.

Built in class from the sample file · AI drafted, you verified — Sample data

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

01 Programme Overview

You already use Excel well. What has changed is that an AI assistant can now write the formula, draft the PivotTable and produce the VBA in seconds. That is genuinely faster. It is also how wrong numbers get into a management report, because the output looks finished whether or not it is right.

This programme teaches both halves over two days. You work through advanced formulas, PivotTable analysis, calculated metrics, dashboards, Power Query cleaning, macros and VBA. At each step you use Copilot or another AI tool to do the first draft, and then you check it. By the end you will be quicker and you will know exactly where the checking has to happen.

Bring your own export. Most of what you build in class is on your own data, so you leave with something you can use on Monday rather than a set of exercises.

02 Learning Objectives

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

- Write and explain advanced formulas including IFS, SUMIFS, XLOOKUP, TEXTJOIN and MAXIFS.
- Use an AI assistant to draft a formula, then verify the result against the source.
- Build and restructure PivotTables that answer a specific business question.
- Create calculated fields and custom metrics inside a PivotTable.
- Turn PivotTables into interactive charts and a one-page dashboard.
- Clean and prepare data with Power Query, with AI help on the harder steps.
- Record macros and write basic VBA, using AI to draft, explain and debug the code.
- Apply PDPA and company data rules to decide what may never be sent to an AI tool.

03 Training Methodology

- ☐ The trainer shows every step first. Participants then do it themselves.
- ☐ Hands-on practice in every module, using your own files or the sample files we provide.
- ☐ A ready-made reference sheet, so you leave with steps that work, not just notes.
- ☐ Group discussion and sharing, so you see how others solve the same problem.
- ☐ Examples taken from real Malaysian workplace situations, not textbook cases.
- ☐ An open clinic at the end of the programme. Bring your own work problem and we solve it together.

04 Programme Outline

MODULE 1 AI-Guided Smart Formulas and Functions

- ☐ The role of functions in Excel, and choosing the simplest one that works
- ☐ Logical functions: IF, IFS, AND, OR, and when nesting becomes a liability
- ☐ Summary functions: SUMIF, SUMIFS, AVERAGEIF, COUNTIF, COUNTIFS
- ☐ Lookups compared: VLOOKUP, HLOOKUP, XLOOKUP, INDEX and MATCH
- ☐ Combining text with TEXTJOIN and CONCAT
- ☐ MAXIFS and MINIFS to find top and bottom performers
- ☐ Describing what you want to an AI tool so the formula comes back usable
- ☐ Reading a formula the AI wrote, and testing it on a row you can check by hand

HANDS-ON ACTIVITY

- ☐ Write a multi-condition formula yourself, then ask AI for its version and compare
- ☐ Replace a nested IF with IFS and confirm the results match exactly

MODULE 2 AI-Assisted PivotTable Insights

- ☐ Preparing a data set so a PivotTable will accept it
- ☐ Customising layout and design so the report is readable
- ☐ Field settings, renaming and choosing the summary function
- ☐ Filters and slicers to focus on what matters
- ☐ Sorting and grouping to make a pattern visible
- ☐ Grouping dates into weeks, months and quarters
- ☐ Asking AI to suggest a layout for a question, then building it
- ☐ Refreshing correctly when the source data grows

HANDS-ON ACTIVITY

- ☐ Build a PivotTable from a raw export and answer three set questions
- ☐ Add slicers and connect them to more than one PivotTable

MODULE 3 Intelligent Calculations and Metrics

- ☐ Calculated fields inside a PivotTable
- ☐ Calculated items, and their limits
- ☐ Percentage of total, of row and of parent
- ☐ Running totals, rank and difference from the previous period
- ☐ Building a margin, yield or cost-per-unit metric
- ☐ Deciding what belongs in the source data and what belongs in the Pivot
- ☐ Using AI to draft the calculation, and stating the rule in writing yourself
- ☐ Checking a calculated figure against the source before it is used

HANDS-ON ACTIVITY

- ☐ Add margin and percentage-of-total calculations to a sales Pivot
- ☐ Write down the definition of each metric so next month matches

MODULE 4 AI-Powered Charts and Dashboard Automation

- ☐ Turning a PivotTable into a chart that makes the point
- ☐ Choosing between column, bar, line and combination
- ☐ Formatting for an executive audience: labels, axis, colour
- ☐ Building a dashboard sheet separate from the working sheets
- ☐ Connecting slicers so one control drives every visual
- ☐ Laying out KPI figures, trend and breakdown on one screen
- ☐ Sharing a dashboard without breaking the links behind it
- ☐ Keeping it to one page that prints

HANDS-ON ACTIVITY

- ☐ Build a one-page dashboard with KPI cells, a trend chart and a breakdown
- ☐ Connect the slicers and check every visual responds together

MODULE 5 Advanced Pivot Analysis Techniques

- ☐ Drill-down to the records behind a figure
- ☐ Conditional formatting inside a PivotTable to highlight outliers
- ☐ Combining data from several sources in one PivotTable
- ☐ Using the Data Model when a lookup is not enough
- ☐ Highlighting trends with rules rather than by hand
- ☐ Linking PivotTables with PivotCharts for a connected report
- ☐ Comparing periods side by side
- ☐ Spotting a figure that is wrong because the data is wrong

HANDS-ON ACTIVITY

- ☐ Build a Pivot across two related tables and verify the totals
- ☐ Apply a conditional formatting rule that flags outliers automatically

MODULE 6 AI-Enhanced Data Cleaning with Power Query

- ☐ Data types: number, date, text and true or false, and why they matter
- ☐ Removing and choosing columns efficiently
- ☐ Finding and removing duplicates
- ☐ Fixing nulls, errors and stray spaces
- ☐ Cleaning unwanted characters and hidden formatting
- ☐ Splitting and merging columns, and unpivoting a cross-tab
- ☐ Recording the steps so next month is a refresh, not a rebuild
- ☐ Using AI to work out the transformation you cannot picture

HANDS-ON ACTIVITY

- ☐ Clean a messy export and confirm no records were lost
- ☐ Refresh the query against a second month of data

MODULE 7 Getting Started with AI-Supported Automation

- ☐ What a macro is, and what it cannot do
- ☐ The macro recorder, and recording so it still works next month
- ☐ Relative against absolute recording
- ☐ Recording a formatting and reporting routine you do every week
- ☐ Assigning a macro to a button and the Quick Access Toolbar
- ☐ Saving as a macro-enabled workbook and handling the security prompt
- ☐ Testing on a copy before running on the real file
- ☐ When a macro is the wrong answer and Power Query is the right one

HANDS-ON ACTIVITY

- ☐ Record a macro that formats a raw export into your report layout
- ☐ Assign it to a button and run it on a second file

MODULE 8 Writing VBA Faster with AI Assistance

- ☐ The VBA editor, modules and the immediate window
- ☐ Reading code before you run it, line by line
- ☐ Variables and data types, in the smallest useful amount
- ☐ If and Select Case for decisions
- ☐ Referring to cells, ranges, sheets and workbooks
- ☐ Asking AI for a procedure, then renaming and simplifying what comes back
- ☐ Debugging with AI: what to paste in and what to leave out
- ☐ Commenting code you will have to read again in six months

HANDS-ON ACTIVITY

- ☐ Convert a recorded macro into readable VBA you can change
- ☐ Break the code on purpose, then use AI to help diagnose the error

MODULE 9 **AI-Driven Excel Automation**

- ☐ Turning a description of a manual process into a working script
- ☐ Looping through rows to check, flag or copy records
- ☐ Handling a data range that changes size each month
- ☐ Writing output to a new sheet or a new file
- ☐ Simple error handling so a macro stops cleanly
- ☐ Building a small end-to-end routine: clean, calculate, format, save
- ☐ What must never be pasted into a public AI tool, under PDPA and company rules
- ☐ The working habit: describe, read, test on a copy, check the output, keep

HANDS-ON ACTIVITY

- ☐ Build a routine that cleans, calculates and saves a report in one run
- ☐ Prove the output against the source before you would send it to anyone

05 Target Participants

This programme is suitable for:

- ☐ Analysts and executives who build management reports and want to build them faster
- ☐ Finance and accounts staff working with large exports and monthly reconciliations
- ☐ Operations, production and supply chain staff analysing volume, cost and yield
- ☐ HR and admin staff producing recurring reports from system exports
- ☐ Sales and marketing staff analysing pipeline, spend and performance
- ☐ Team leads who will be asked to set the rules for AI use in their department
- ☐ Experienced Excel users who are already using AI and want to use it safely

06 What You Need to Bring

- ☐ A laptop, not a tablet, with Microsoft Excel installed. Excel 2019 or later, or Microsoft 365.
- ☐ One real data export from your own system, in Excel or CSV. Use our sample file if you cannot bring one.
- ☐ An AI account. We guide you through the setup at the start of the programme.
- ☐ One task you repeat every week that you would like to stop doing by hand.

07 Expected Training Outcome

You leave faster at the work you already do, with a dashboard, a refreshable query and a working macro built on your own data. More importantly, you leave with a checking routine: you know which figures an AI tool can draft and which ones you have to prove yourself, and what must never be pasted into one. For the company, the reporting gets quicker without the accuracy quietly getting worse.

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