



Global Excel  
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# Self Service Business Intelligence Boot Camp

Date: 18, 19, 22 May 2026

Time: 10:00–17:00 CET

Location: London, UK

This course is a hands-on course and runs over 3 days. Each day will run approximately 7 hours in length, depending on the class size and attendees' experience in working with the tools.



2012					
Row Labels	Sales (Units)	MTD Units	QTD Units	YTD Units	YTD Units - Mar 31 YE
Ethical Development	836	2,524	6,767	12,581	6,767
Tax Evader	138	2,128	5,734	11,642	5,734
The Squintz	327	2,381	5,793	12,769	5,793
Grand Total	1,300	7,033	18,294	36,992	18,294

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# Course outline

## Course overview

Prepare to change your company's reporting game forever, as 18x Microsoft MVP **Ken Puls** lands in Munich for a 3-day exclusive Self-Service BI boot camp.

We know that data is not usually stored in nicely curated databases. And often — even when it is — the data analyst doesn't have access to it. Instead, we must piece together data provided in text files, Excel files, web pages, and even the body of emails to build the business intelligence solutions we need. Until now this has been a painful process. That stops with this workshop!

The Self-Service BI Boot Camp begins with a deep exploration of Power Query. Built into Excel and Power BI, you'll learn to use it for cleaning, reshaping, and combining data with ease.

Next, we'll dive into Dimensional Modelling, which is based on the Power Pivot Data model and used to design and link parent tables correctly. You'll learn key Power Query patterns to solve common table relationship challenges. Finally, we'll get stuck into DAX, a powerful formula language for creating advanced measures, as well as calendar intelligence for year-end reporting.

Throughout this 3-day workshop, you'll be working with both Excel and Power BI. Why? Because the tools and concepts you'll be learning work in both places. So how do you know which one is right for the job?

## Learning outcomes

### What you'll learn?

- > Excel Pivot tables
- > Importing Data with Power Query
- > Creating Table relationships with the Data Model
- > Dimensional Modeling
- > Introduction to basic and intermediate DAX formulas
- > Calendar Tables and intelligent measures
- > Dashboarding with Power BI
- > Excel vs Power BI use cases





# Who is this course for?

This Booth Camp is for anyone who needs to build reports based on data. Experience working with Excel PivotTables is highly encouraged. Experience with Power BI is optional.

If you create Data Models in Excel or Power BI, then this Masterclass is for you.



**Business Intelligence or Analytics professionals**



**Every day Power BI users**



**Anyone who needs to build reports based on data**



**Managers aiming to improve their current reporting systems**



⊕ SalesTransactions	14,789.39	9,458.47	24,247.86
⊕ SalesItems	6,089.54	84.40	6,173.94
⊕ SalesCategories	5,210.06	1.17	5,211.23
⊕ Calendar	337.97	10.71	348.68
Grand Total	26,426.96	9,554.75	35,981.71

⊕ Transactions	481.85	6,107.41	6,589.26
⊕ Categories	3,130.68	0.91	3,131.59
⊕ Items	1,704.37	55.61	1,759.98
⊕ Servers	1,044.22	0.20	1,044.43
⊕ Calendar	337.97	10.71	348.68
Grand Total	6,699.09	6,174.84	12,873.93

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## Takeaways

### Part 1 Master Your Data

#### Excel Pivot Table Review

- › Pivot Compliant Data Sources
- › Building Basic Pivot Tables
- › Pivot Tricks Everyone Should Know

#### Refreshing imports

- › Append data from multiple tables
- › Appending a folder full of files

#### Data Transformation Recipes

- › Recipes for unpivoting data
- › Recipes for pivoting data
- › Recipes for grouping data

#### Importing Data with Power Query

- › Individual CSV, text and Excel files
- › Cleaning and manipulating data

#### Merging Tables

- › 7 ways to merge data
- › Cartesian Products
- › Approximate Matches

#### Conditional Logic

- › Basic conditional columns
- › Advanced conditional logic
- › Creating columns from example

### Part 2 Building BI

#### Getting Started with the Data Model

- › Why do we need the Data Model?
- › Creating table relationships
- › Using the Data Model in Excel
- › Filtering methods
- › Sorting based on other columns

#### Laying a Dynamic Groundwork

- › Append data from multiple tables
- › Appending a folder full of files

#### Model Development Tips

- › Design best practices
- › Impact of Query Folding

#### Introduction to Dimensional modelling

- › Facts vs Dimensions
- › Designing Fact and Dimension tables
- › Supported Join Types
- › Creating one to many dimensions
- › Creating composite key joins

#### Introduction to DAX formulas

- › Creating basic DAX measures
- › Understanding DAX calculation
- › Understanding Filter Context

Solution: Add Effective Dates columns

Create a “Surrogate Key” to act as the “Primary Key” for the table

The original Primary Key isn't unique anymore! Now it's a Dimension

pKey	Dimensional Fields				Effective Dates		pKey
CustomerID	Name	Address	City	Province	From	To	Link
1	Fred	123 Somewhere St	Langley	BC	2020-01-01		1.001
2	Bob	456 Nowhere Close	Surrey	BC	2020-01-01	2020-02-15	2.001
3	Mary	4 The Win	Vancouver	BC	2020-01-01		3.001
2	Bob	1 So Close	Vancouver	BC	2020-02-16		2.002

New Surrogate Key is unique so becomes the new Primary Key

## Course contents

### Part 3 DAX & Time Intelligence

#### Calendar Tables

- › Importance of Calendar dimensions
- › Creating Calendars tables on the fly
- › Power Query date functions

#### Calendar Intelligent Measures

- › Understanding DAX date functions
- › Exploring the Golden Date Pattern
- › Applying the Golden Date Pattern
- › Creating calendar-safe date patterns

#### Dashboarding with Power BI

- › Creating reports in Power BI
- › Exploring Power BI visuals
- › Publishing to the Power BI service
- › Sharing in the Power BI service

#### Intermediate DAX

- › The magic of CALCULATE()
- › Understanding how CALCULATE works
- › Removing filters with ALL()
- › Conditional logic in DAX

#### Merging Tables

- › 7 ways to merge data
- › Cartesian Products
- › Approximate Matches

#### Excel and Power BI – Better Together

- › Which tool do you use and when?
- › Porting Excel models to Power BI
- › Analyzing Power BI models with Excel

**Every course ends with a live Q&A opportunity with the instructor**

#### Training requirements

You must bring a laptop with both of the following installed:

- › Excel 2016 or higher (**Microsoft 365** recommended)
- › **Power BI Desktop** version 2.119.x (July 2023) or higher



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New Surrogate Key is unique so becomes the new Primary Key

## Why choose our "Self Service Business Intelligence Boot Camp"?

### What you get?

- ✓ Three days in-person training with Excel Guru **Ken Puls**
- ✓ Claim up to 21 hours of CPD (Continuing Professional Development) hours / points
- ✓ All working files
- ✓ A free Monkey Tools Pro License
- ✓ A free digital copy of Ken's Master Your Data e-book
- ✓ One year of access to the online version of the Self Service BI Academy (including access to semi-monthly "Ask Ken Anything" sessions)
- ✓ Lunch, Coffee, tea and biscuits throughout the day

### What people say?



Ken has a wonderful teaching style. He's very knowledgeable and clearly has a passion for Power Query and DAX. He dives into details yet walks through each step with very well laid out lessons and before and after files so I never felt lost. Additionally, Ken's foundational teaching in proper setup of data sources, relationships, and other future-proofing concepts has benefited me greatly in building my own data models.

**John Hanson**



This course designed and led by Ken Puls is absolutely fantastic! From simple pivot tables to advanced subjects with Power Query, DAX, Dimensional Modeling and Power BI, you get the complete package with best practices, exercises, Q&A sessions. Ken knows what is important and convey his knowledge very well and practically. I can highly recommend the course to everyone who wants to get the most out of all the Power BI Tools!

**Steffen Fischer**



## About your trainer



# Ken Puls

President  
and Chief Training Officer  
at Excelguru Consulting Inc.



Ken started his career in public practice accounting, and spent 5 years working with small businesses preparing working papers and financial statements. He decided to move into industry accounting, allowing him to focus all his energy on one company where he could truly make a difference.



He has also become an expert in Microsoft Excel. He created a website ([www.excelguru.ca](http://www.excelguru.ca)) which hosts a large knowledgebase of Excel help articles, a blog, and an active forum dedicated to helping users with their Excel issues.



He has also been recognized as a fellow of the Certified Management Accountants of Canada (FCMA) by his peers - an honor held by less than 5% of CMA's, as well as awarded the status of Distinguished Alumni by Kwantlen Polytechnic University.

# Global Excel

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