

# Power Platform World Tour

PowerBIUG PowerAppsUG FlowUG



# Tips & Tricks of a Power BI Premium Implementation in a Financial Institute

Nicky van Vroenhoven

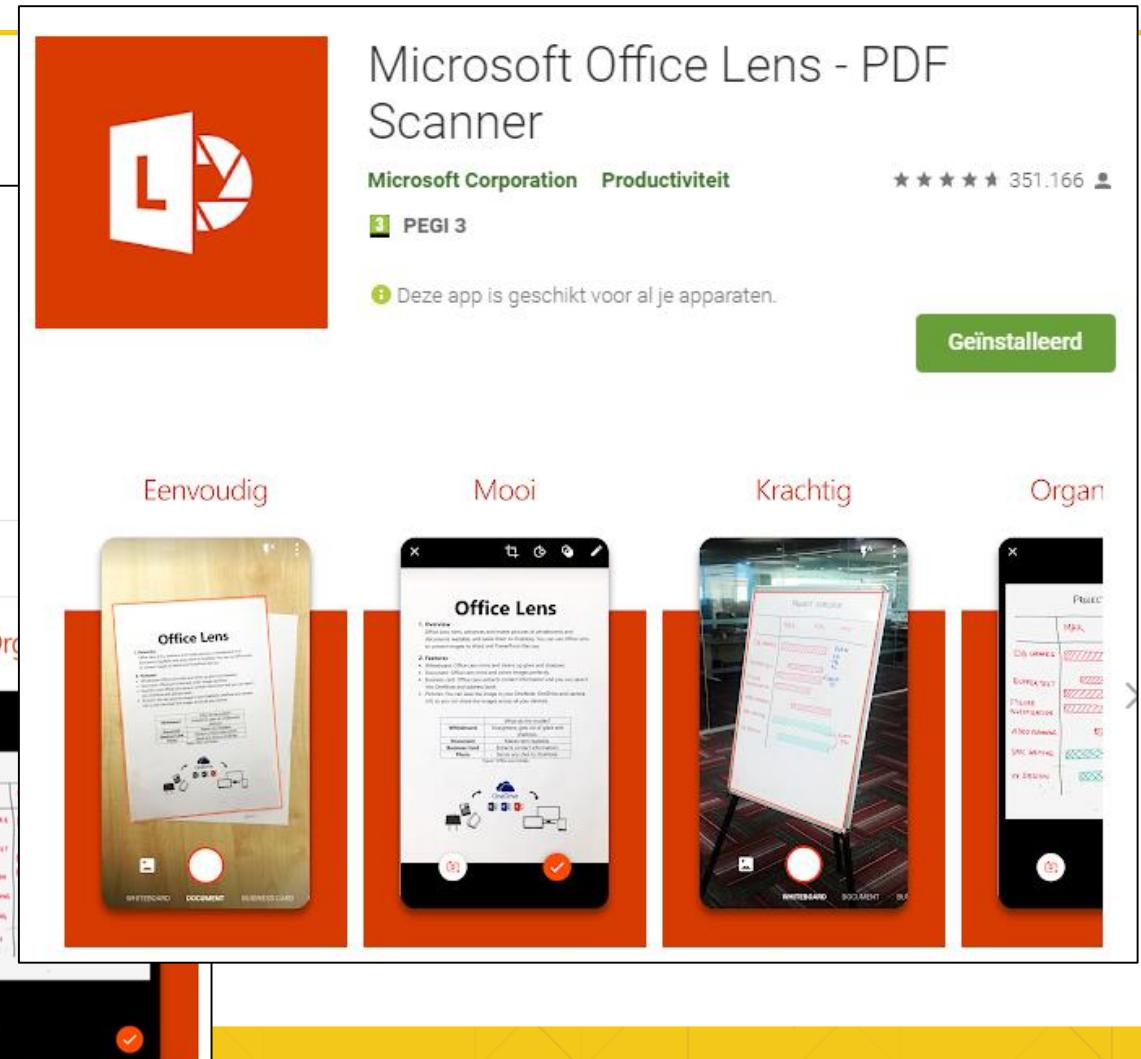
Who are you?  
<http://bit.ly/ppwtdublin>



# Microsoft Office Lens app

Android

iOS



# Microsoft Office Lens app

**without** Lens



**with** Lens



# Agenda

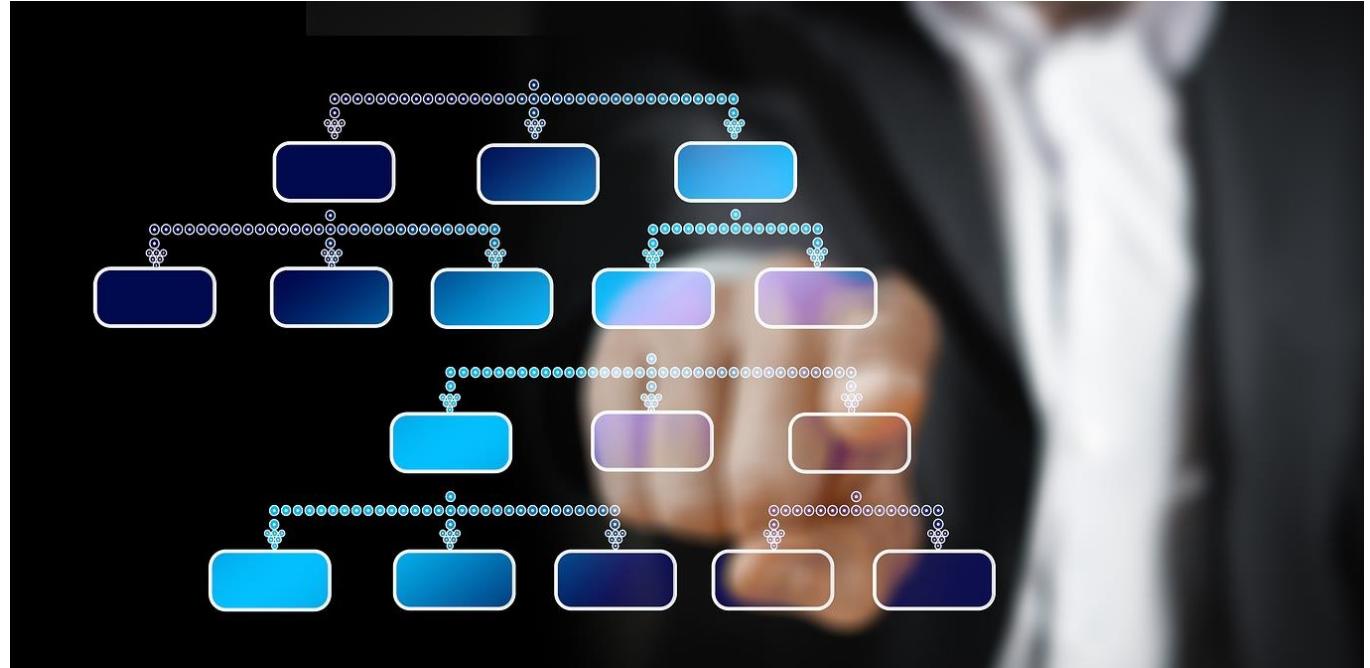
---

- Organisation
- Data management
- Reporting
- Collaborate
- Premium / Support
- Lessons learned
- Next steps

# Agenda

---

- **Organisation**
- Data management
- Reporting
- Collaborate
- Premium / Support
- Lessons learned
- Next steps



# Van Lanschot Kempen

a specialised wealth manager



Specialised in the future  
since 1737

evi



Everyone deserves Evi



Pronounced personally

Kempen



turning dedication into  
dazzling prospects

Show results from:

2019 ▾

Half-year results

Trading updates

Client assets

€ 97.3 billion

Net result

€ 83.6 million

Balance sheet total

€ 14.5 billion

Underlying net result  
(excluding expenses related  
to Strategy 2020 investment  
programme and restructuring  
charges)

€ 92.5 million

Common Equity Tier 1 ratio  
(CET1 fully loaded, excl.  
retained earnings)

22.7 %

Efficiency ratio

75.5 %

# Nicky van Vroenhoven

- Senior BI Developer
- Van Lanschot Kempen

 @NickyvV

 nickyvv.com



# Who Are You?

<http://bit.ly/ppwtdublin>

Who Are You? (PP WT Dublin)

PowerPlatform WT Dublin October 2019

All answers will be deleted after this session.

\* Vereist

1. What is your first name? \*

Voer uw antwoord in

2. What is your continent of origin?

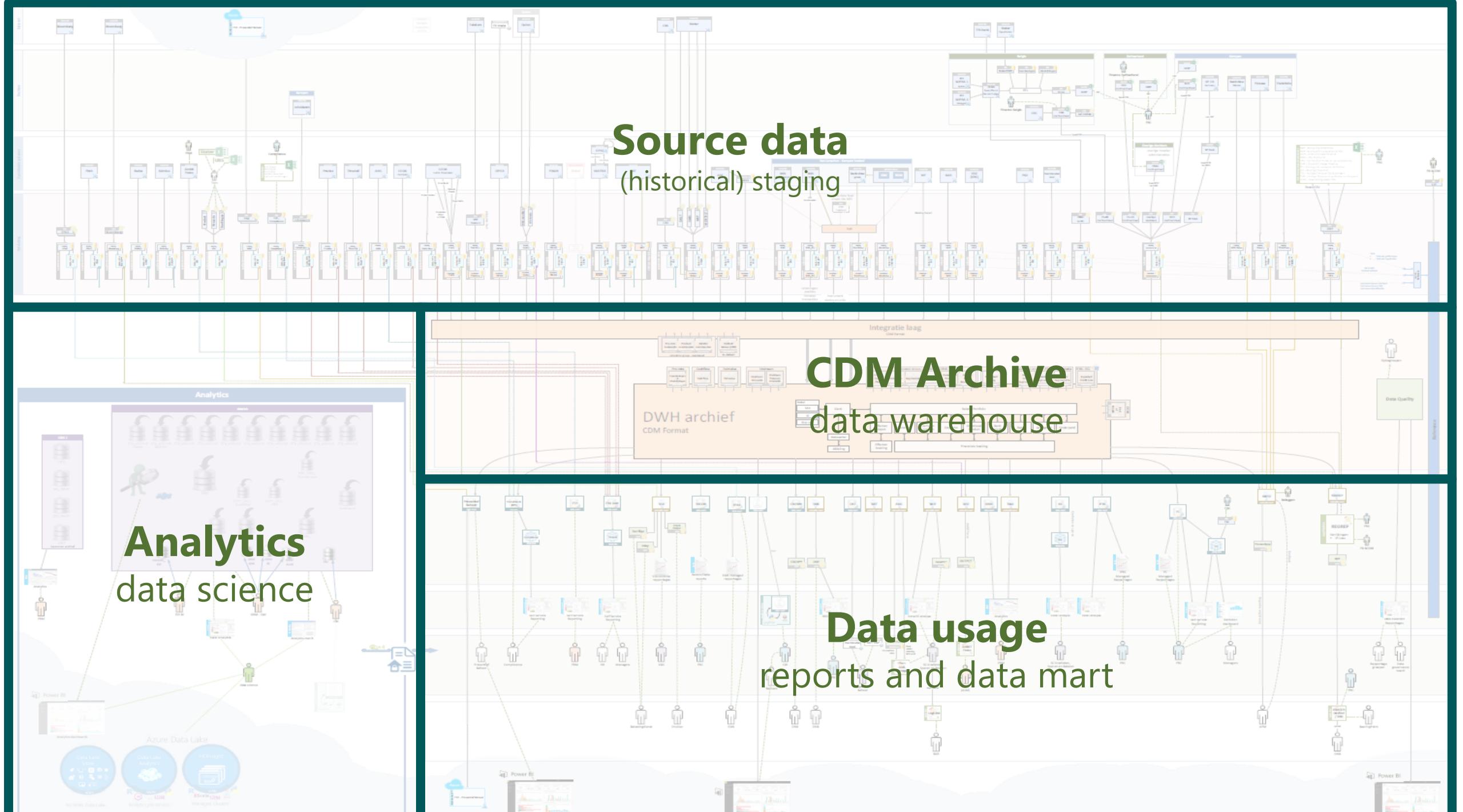
- Africa
- Antarctica
- Asia
- Europe
- North America
- Oceania

# Agenda

---

- Organisation
- **Data management**
- Reporting
- Collaborate
- Premium / Support
- Lessons learned
- Next steps

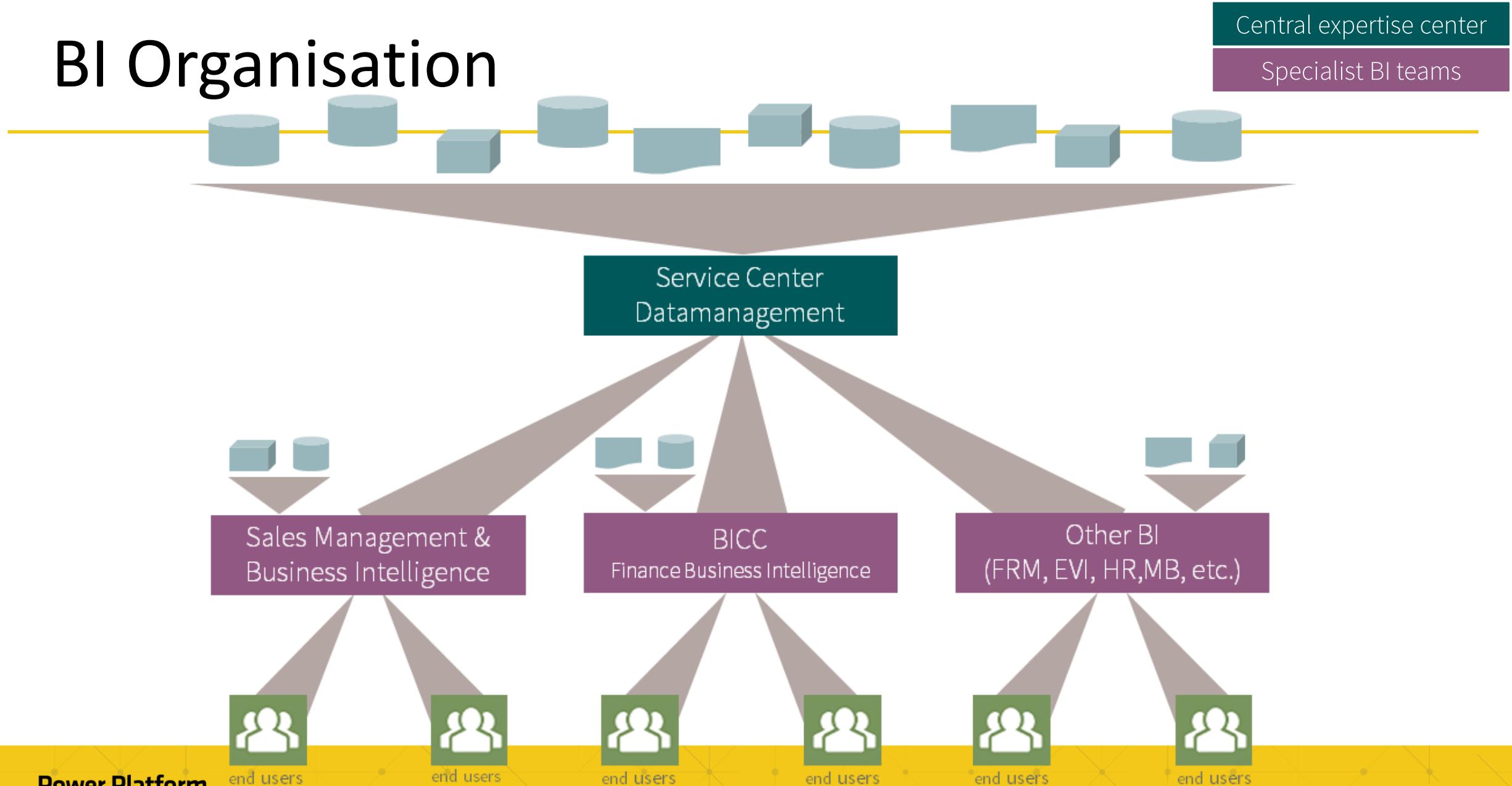




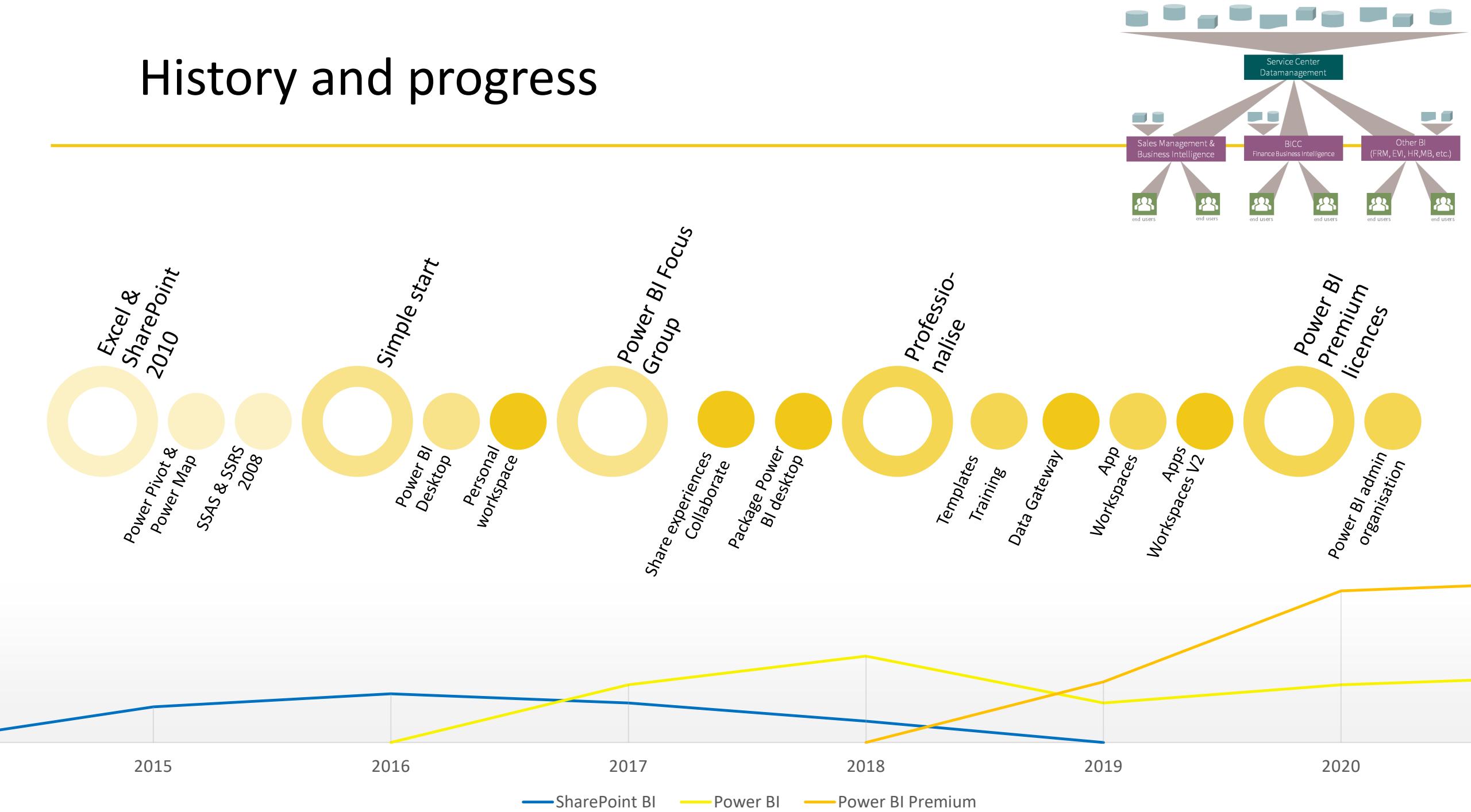


DWH		DM_LAC		STAGING_FINAN		STAGING_Matrix		DM_VIA		ODS		CALC_D...	
								Data Space (GB) 30		Free Space (GB) 40			
Data Space (GB) 222	Index Space (GB) 205	Data Space (GB) 119	Free Space (GB) 27	Data Space (GB) 67	Index Space (GB) ...	Data Space (GB) 51	Free ...	Free Spa...	Index S...	Data Sp...	Index ...	Data Space (G...	Data Space (G...
Free Space (GB) 57	AM_AML	Data Space (GB) 104	Index Space (GB) ...	Data Space (GB) 90	Fre...	STG_ARC...	STG_ARC...	DWH_C...	EM_RISK	STAGI...	EM_RE...	Data Space...	Data Space...
DM_GRM	Index Space (GB) 205	Data Space (GB) 104	Index Space (GB) ...	Data Space (GB) 68	Free Space (GB) ...	Data Space (G...	Index Space (...	Free Space (G...	Data Space ...	Data Space...	Data Space...	Data Space...	Data Space...
Data Space (GB) 121	Index Space (GB) 52	Data Space (GB) 44	Free ...	DM_FC	Index Space...	STAGING_PSD	TRAN...	DM_...	TRA...	STG_...	STG...	EM_...	EM_...
Free Space (GB) 86	STG_ARCHIVE_Bankview	Data Space (GB) 60	Free Spa...	Index Sp...	Data Space (GB) 71	Free Spa...	Free Space (G...	Fr... D...	Data Spa...	Free Sp...	Free Sp...	Index S...	Data S...
Index Sp...	DM_Klantmonitoring	Data Space (GB) 54	Index Space (...	STG_ARCHIVE_Mainframe	Index Sp...	DBA_monitor...	TRANSF...	STG...	STA...	CA...	ST...	ST...	ST...
Free Space (G...	EM_DGS	Data Space (GB) 54	Index Space (...	Free Space (G...	Free Spa...	AM_FTP	STAG...	Data S...	Data S...	Data...	Data...	Data...	Data...
Free Space (G...	DM_Preventi...	Data Space (GB) 54	Index Space (...	DM_Preventi...	Fr...	STG_AR...	TRA...	AM...	AM...	EM_A...	EM_A...	EM_A...	EM_A...
Free Space (G...	TRANSF...	Data Space (GB) 54	Free Space (G...	TRANSF...	Fr...	STAGIN...	STAG...	T...	S...	S...	S...	S...	S...

# BI Organisation



# History and progress



# BI in a financial institute

*BI at a bank has its challenges*

- Regulatory requirements and constraints
  - National and European supervisors (AFM, DNB, ECB)
- Sensitive data
  - Privacy laws: AVG (Dutch) and GDPR



# IT versus Business Structure <sub>vs</sub> regulation <sub>vs</sub> freedom

---

Searching for the best of both worlds:

- IT for structure and repeatability
- Business for knowledge, usability and flexibility



# IT versus Business Structure <sub>vs</sub> regulation <sub>vs</sub> freedom

---



**Trust is key**

# IT versus Business Structure <sub>vs</sub> regulation <sub>vs</sub> freedom

---

**Monitor** to prevent  
proliferation



# Agenda

- Organisation
- Data management
- **Reporting**
- Collaborate
- Premium / Support
- Lessons learned
- Next steps

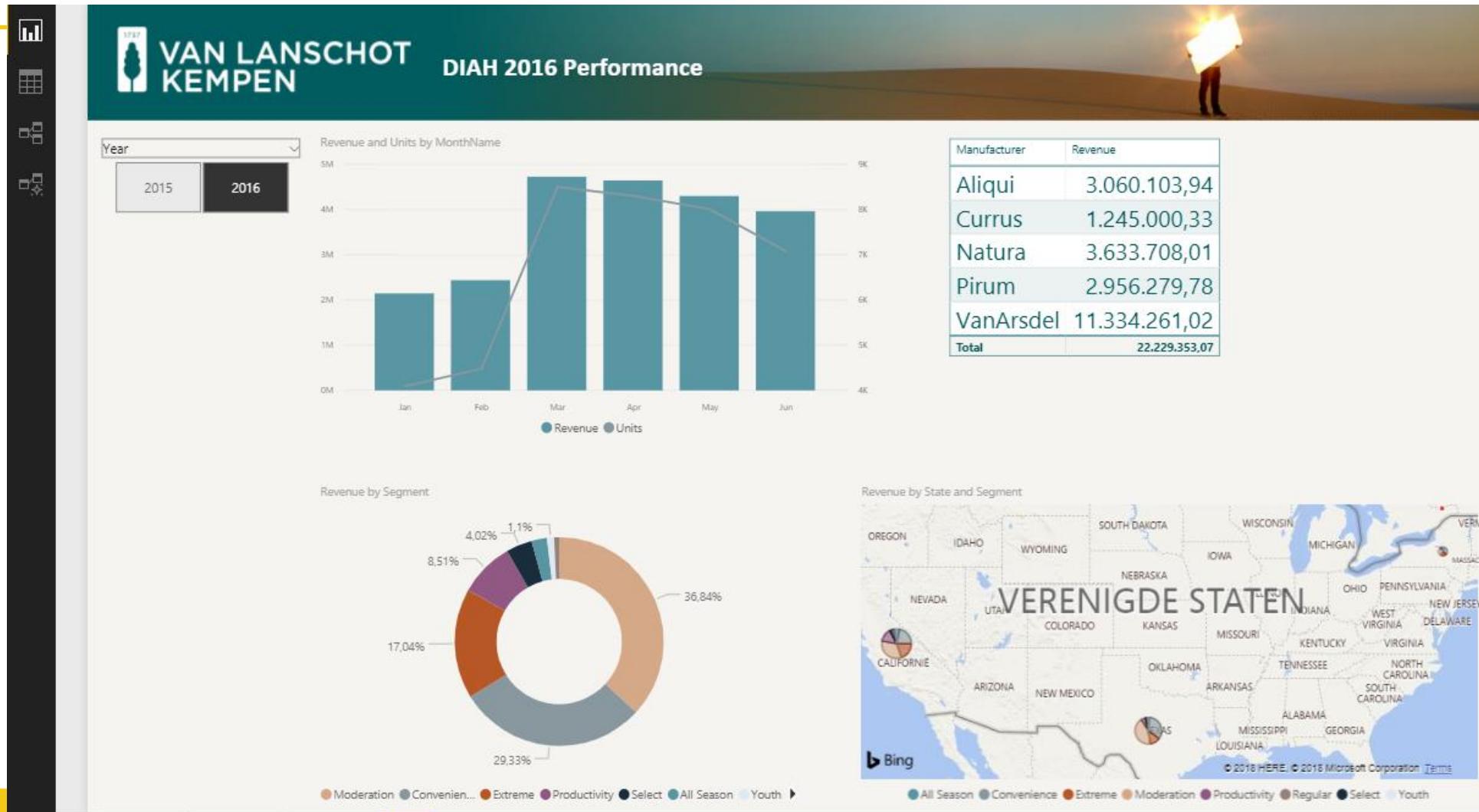


# Power BI at VLK

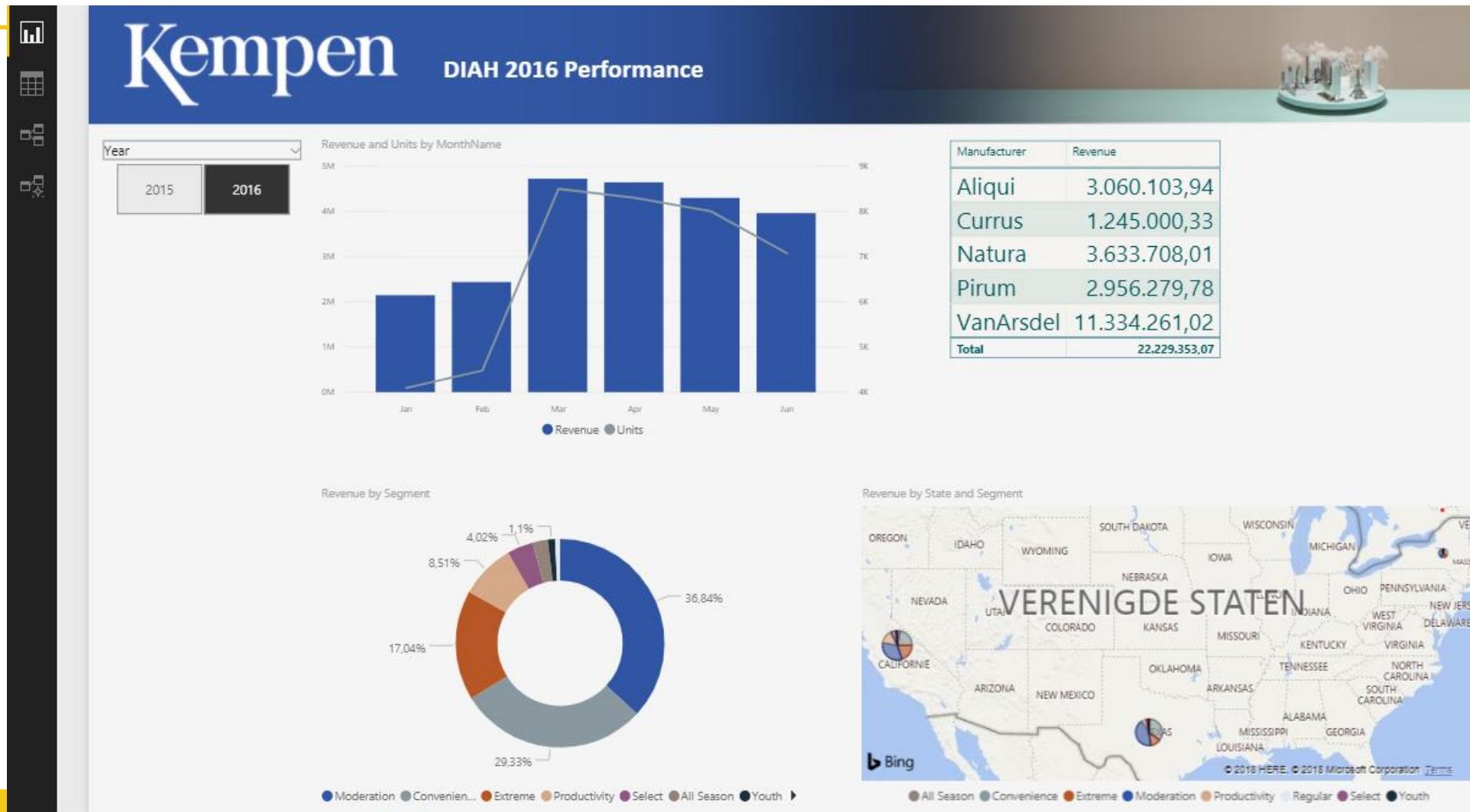
---

- Templates
  - VLK, VL, Kempen, Evi

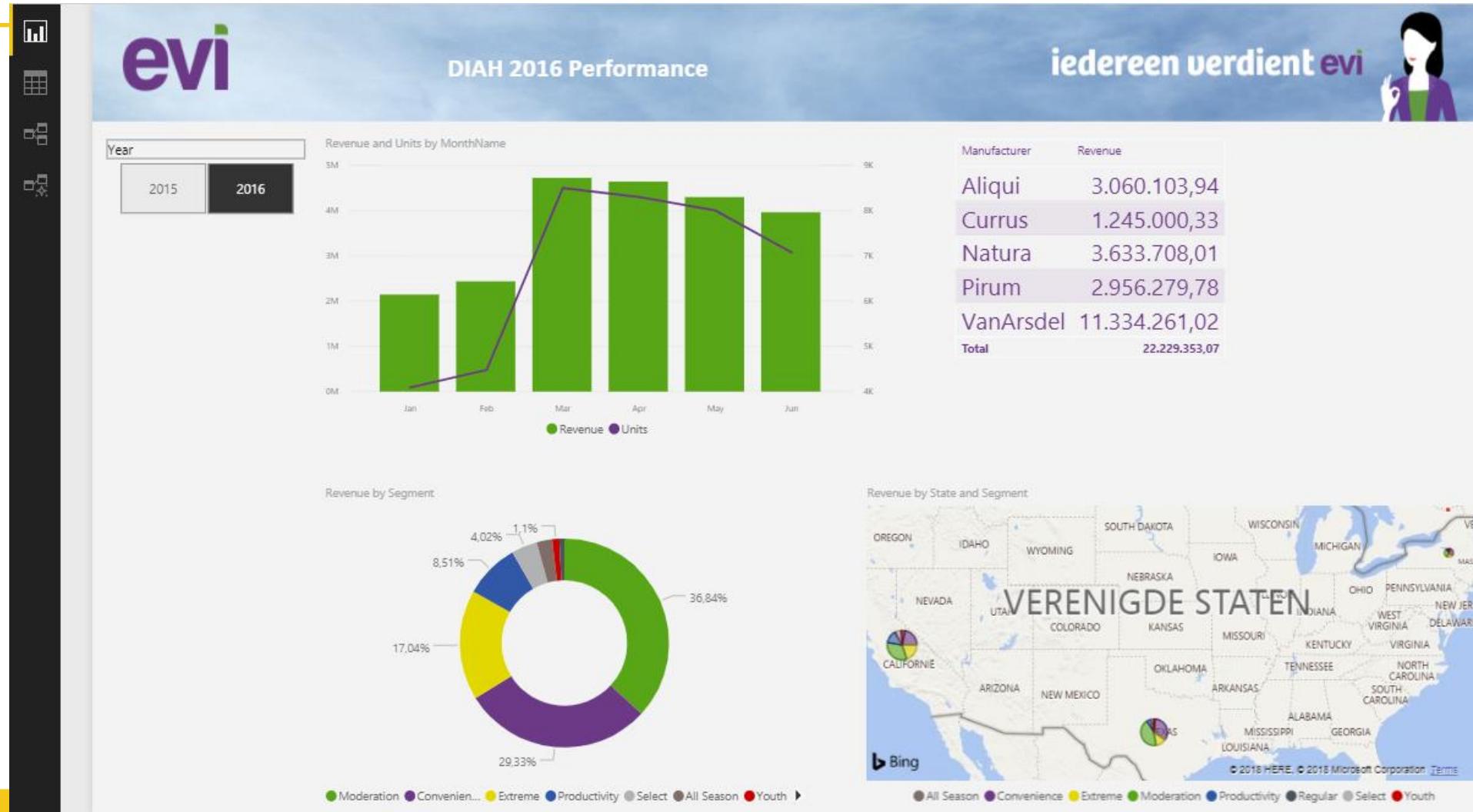
# Power BI at VLK



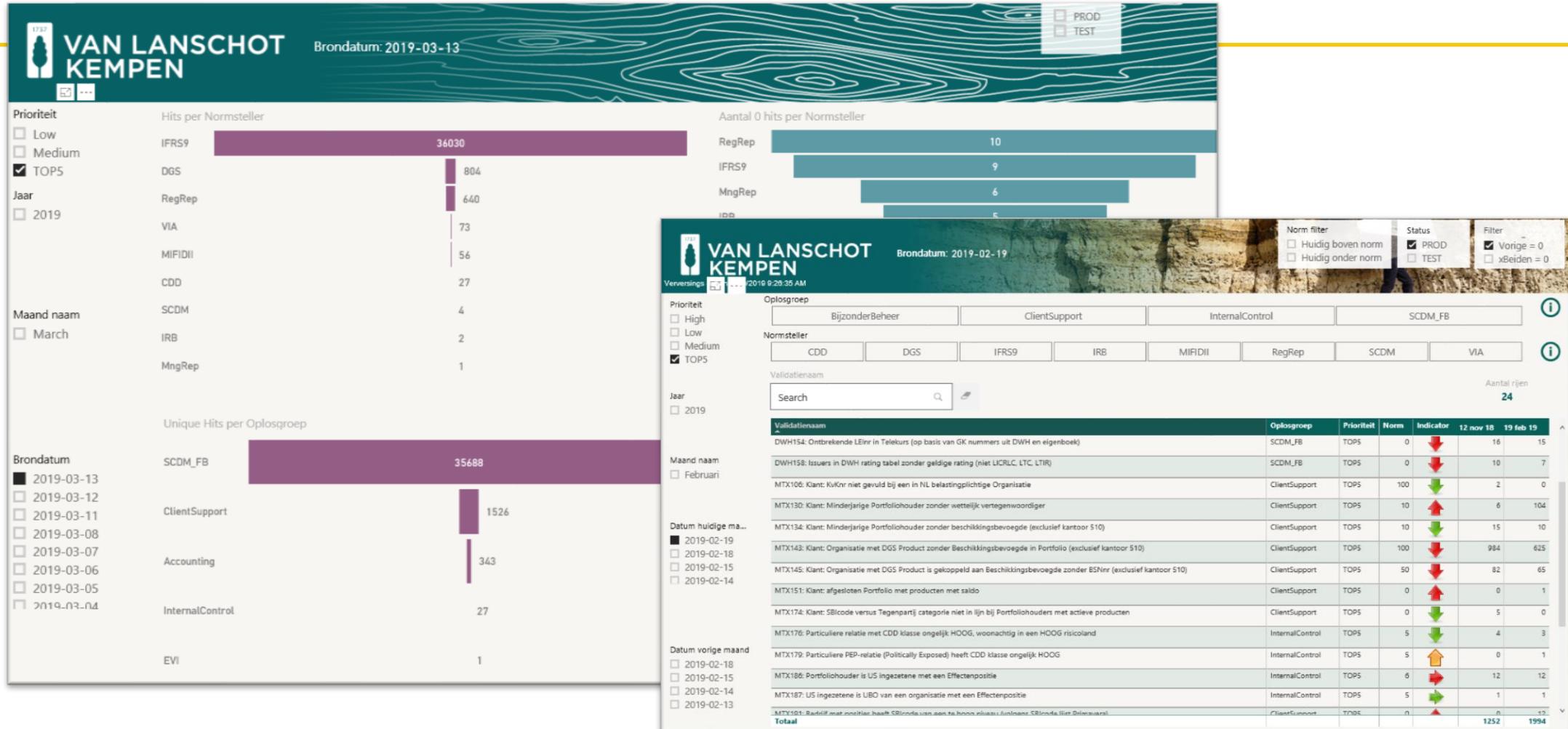
# Power BI at VLK



# Power BI at VLK



# Data Quality dashboard in Power BI



# Weekoverzicht suspicious cases

Huidige week

**2018-47**

11/19/2018 11/25/2018

WeekStart

WeekEnd

relatielnr

All ▾

segment

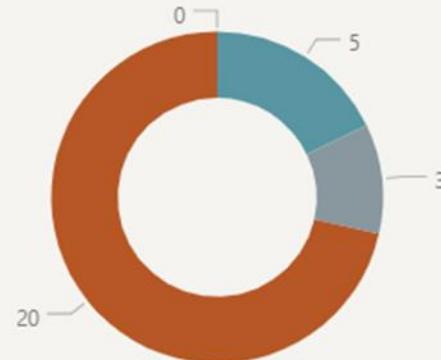
All ▾

weeknr

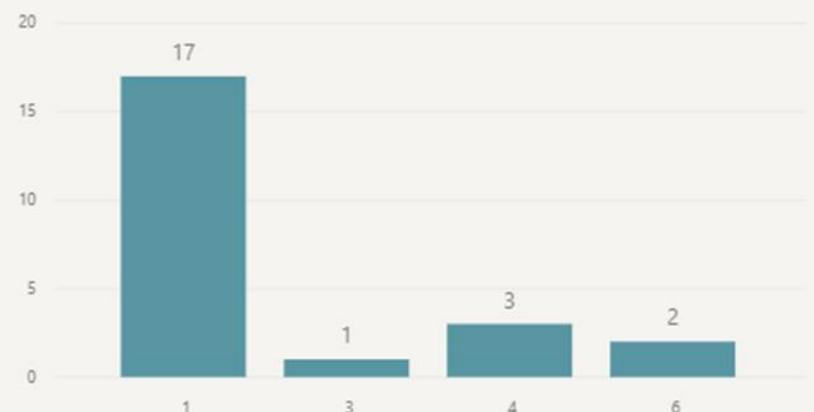
2018-36 ▾

- # bet.trans
- # eff.trans
- # keywords
- # watchlist

Aantal alerts per type



Aantal cases per score



Feedback toevoegen

ID: Week: 2018-36 Save

Verdacht

unshor: case gegenereerd ivm gebruik woorden Panama papers in meeting

Client Name

Search

Instrument Name

Turnover Classes

Search

Entered Date

9/22/2017

4/25/2018

&gt; \$M

Client 1

MERCHANT BANK DWH  
REFRESHED 5/25/2018 12:30:19 PM

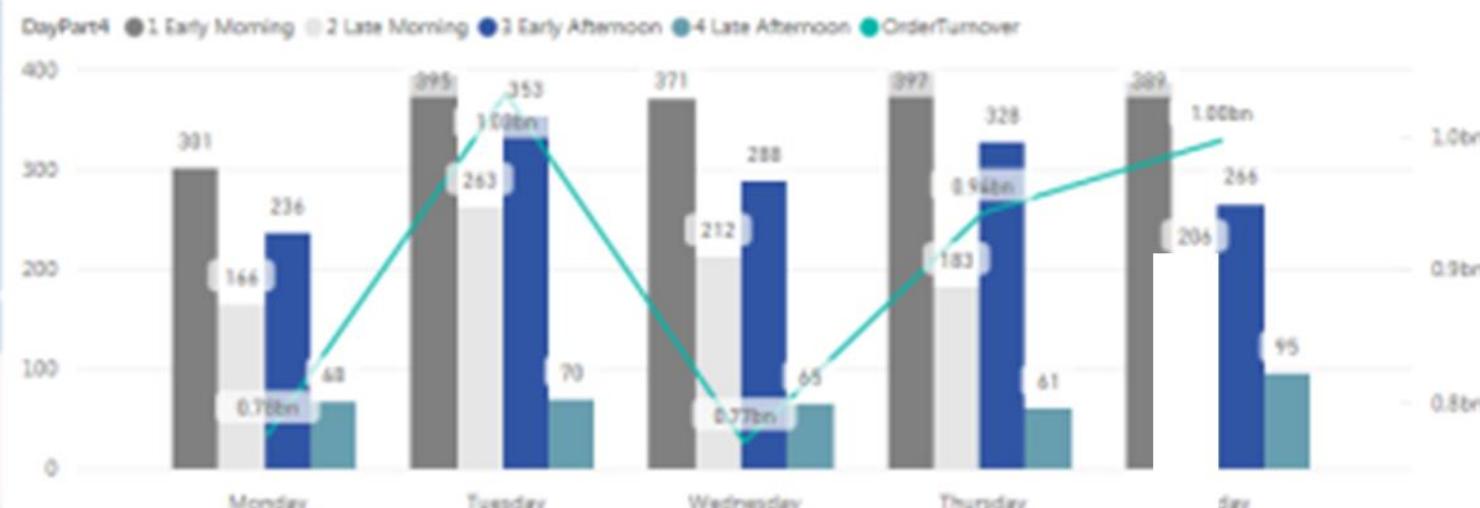
TRADE ANALYZER

Kempen

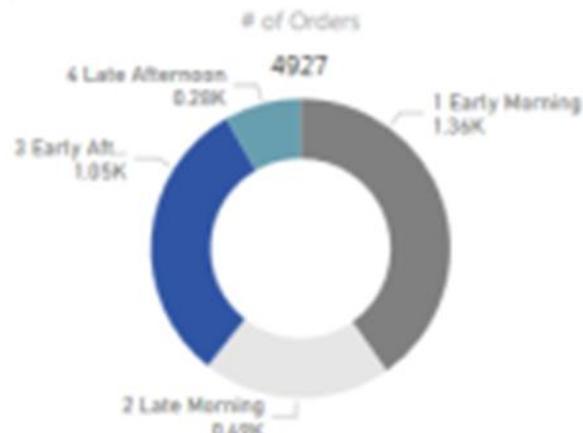
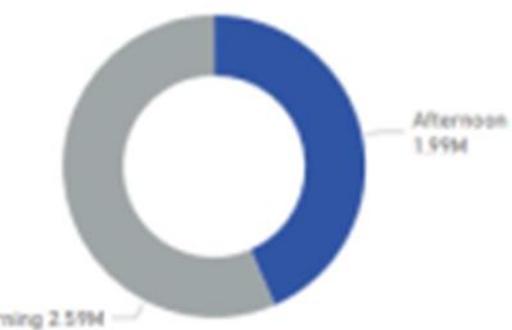
# of Orders by Country Listed



# of Orders per day of the week



Commission Booked



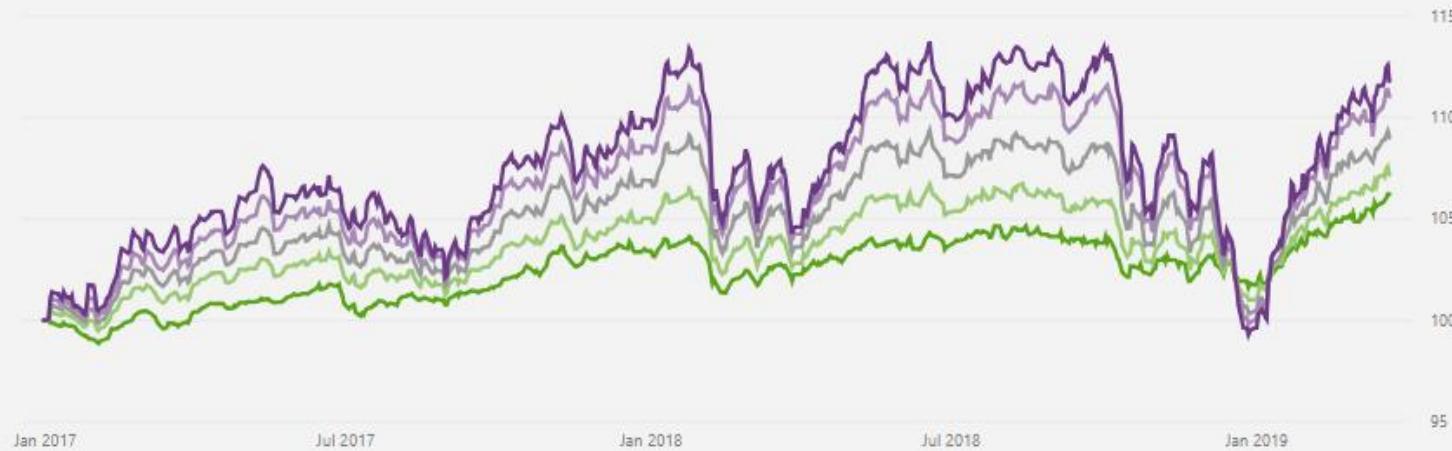
Bing

© 2018 Microsoft Corporation. All rights reserved.



Bruto performance van de modelportefeuilles

Modelportefeuille — Zeer defensief — Defensief — Neutraal — Offensief — Zeer offensief

**Bruto**

Jan 2017

Jul 2017

Jan 2018

Jul 2018

Jan 2019

115  
110  
105  
100  
95

12.21%

11.01%

8.50%

6.09%

4.41%

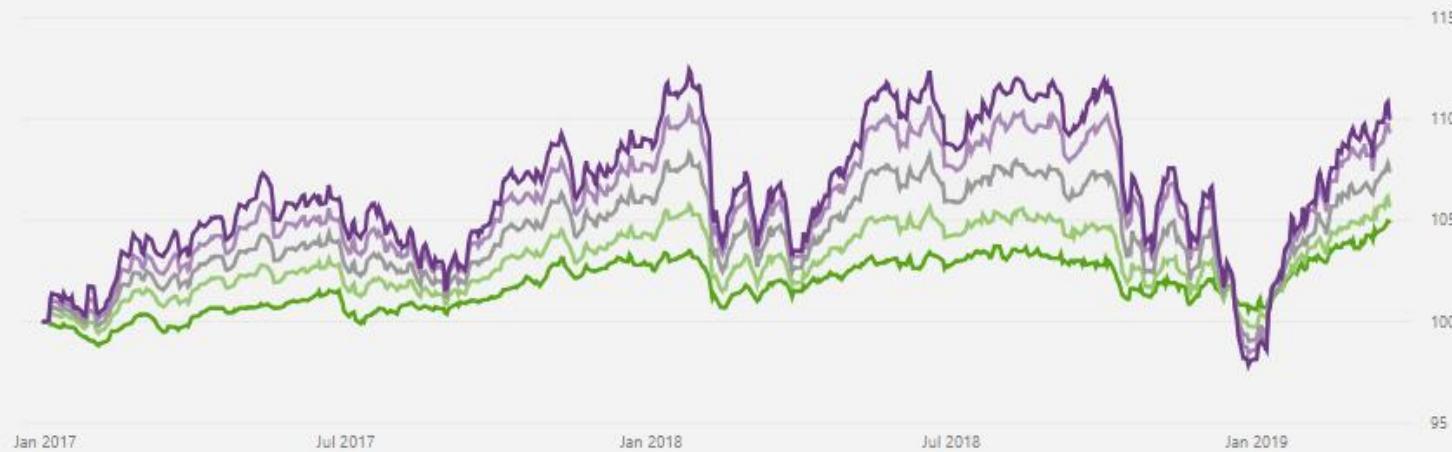
0%

10%

**Netto**

Netto performance van de modelportefeuilles

Modelportefeuille — Zeer defensief — Defensief — Neutraal — Offensief — Zeer offensief



Jan 2017

Jul 2017

Jan 2018

Jul 2018

Jan 2019

95

12.09%

10.90%

8.39%

5.98%

4.31%

0%

10%

Bruto performance YTD per modelportefeuille

Zeer offensief

12.21%

Offensief

11.01%

Neutraal

8.50%

Defensief

6.09%

Zeer defensief

4.41%

0%

10%

Netto performance YTD per modelportefeuille

Zeer offensief

12.09%

Offensief

10.90%

Neutraal

8.39%

Defensief

5.98%

Zeer defensief

4.31%

0%

10%

# Power BI at VLK

---

- Templates
  - VLK, VL, Kempen, Evi
- Packaging PBI Desktop monthly
- Workspaces, Apps and Onedrive for versioning
- Custom Branding in the service

# Custom branding in PowerBI.com

Admin portal

The screenshot shows the 'Custom branding' section of the Power BI Admin portal. A red box highlights the 'Logo' field, which contains a placeholder image of a person's face and includes upload and delete buttons. Another red box highlights the 'Cover image' field, which also includes upload and delete buttons. A third red box highlights the 'Theme color' field, which displays the hex code #323130. The top right corner features the 'VAN LANSCHOT KEMPEN' logo. The bottom navigation bar is also highlighted with a red box, showing icons for Home, Power BI, Snelle toegang (Quick Access), Activiteit (Activity), and a search bar.

Custom branding

Customize the look of Power BI for your whole organization

Logo

For best results, upload a logo that's saved as a .png, 10 KB or smaller, and less than 160 pixels.

Upload Delete

Cover image

For best results, upload a cover image that's saved as a .jpg or .png, 10 KB or smaller, and less than 160 pixels.

Upload Delete

Theme color

#323130

VAN LANSCHOT KEMPEN

Power BI

Snelle toegang

Activiteit

Good afternoon, Nicky

Search

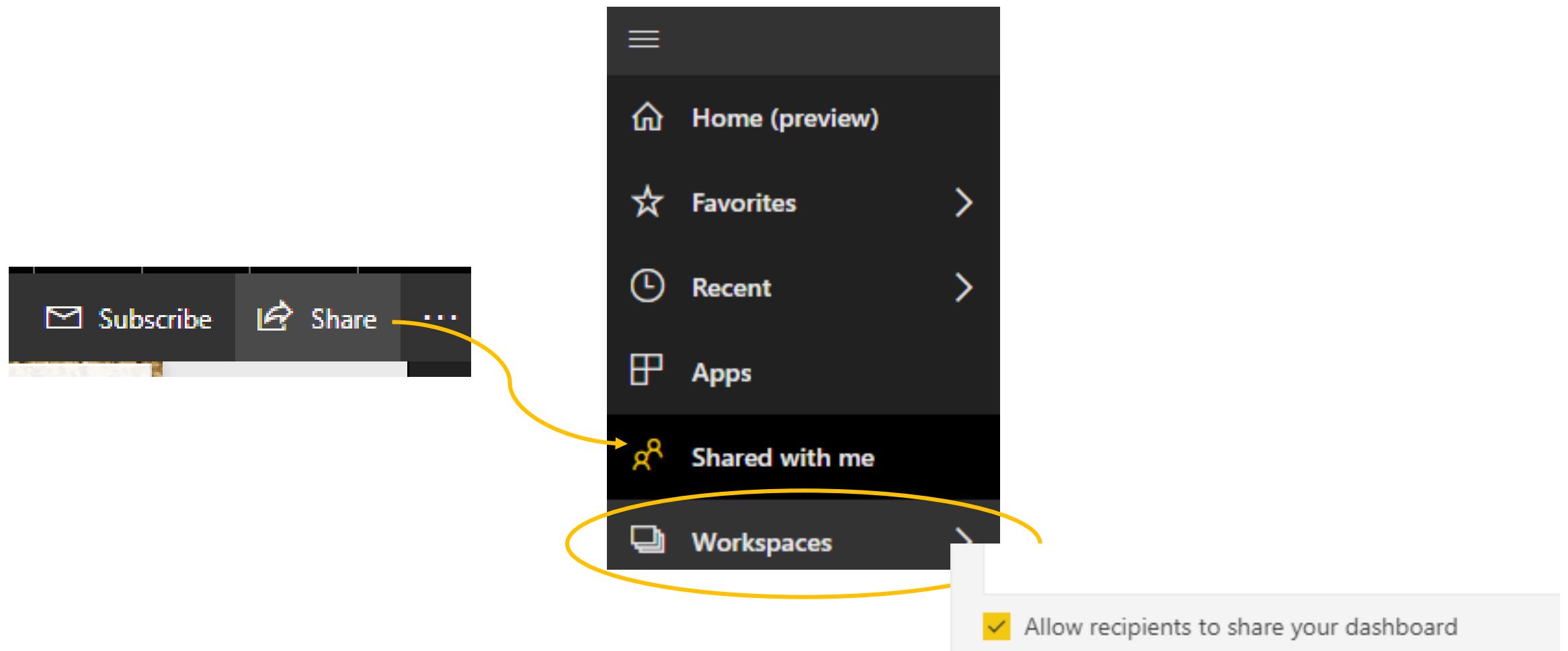
# Agenda

---

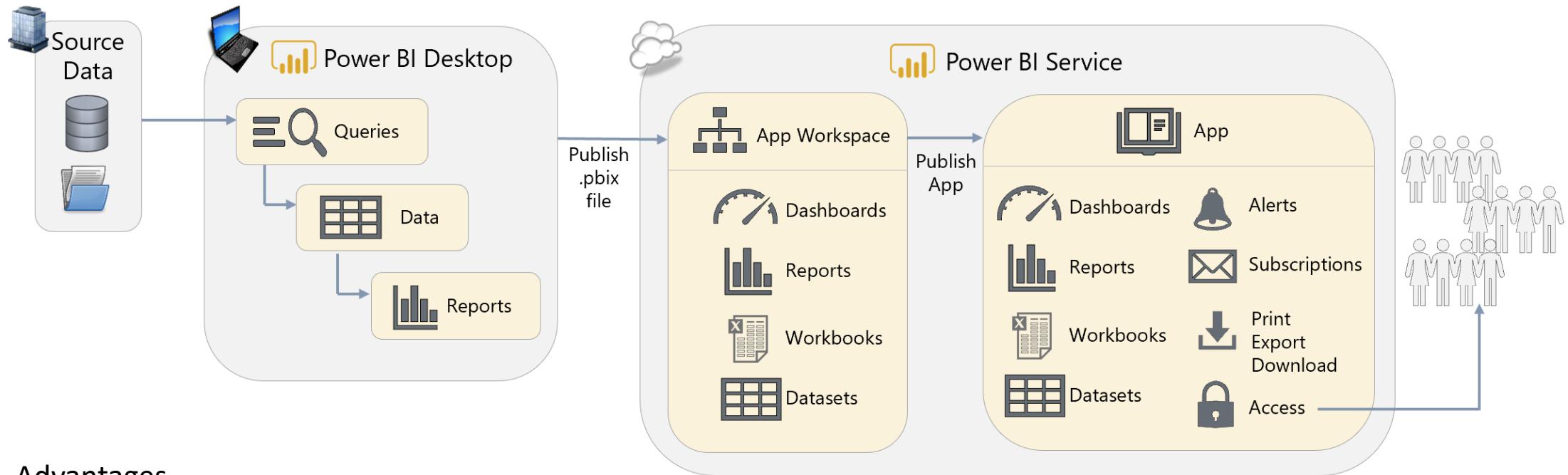
- Organisation
- Data management
- Reporting
- **Collaborate**
- Premium / Support
- Lessons learned
- Next steps



# Power BI Workspaces and Apps



# Power BI Workspaces and Apps



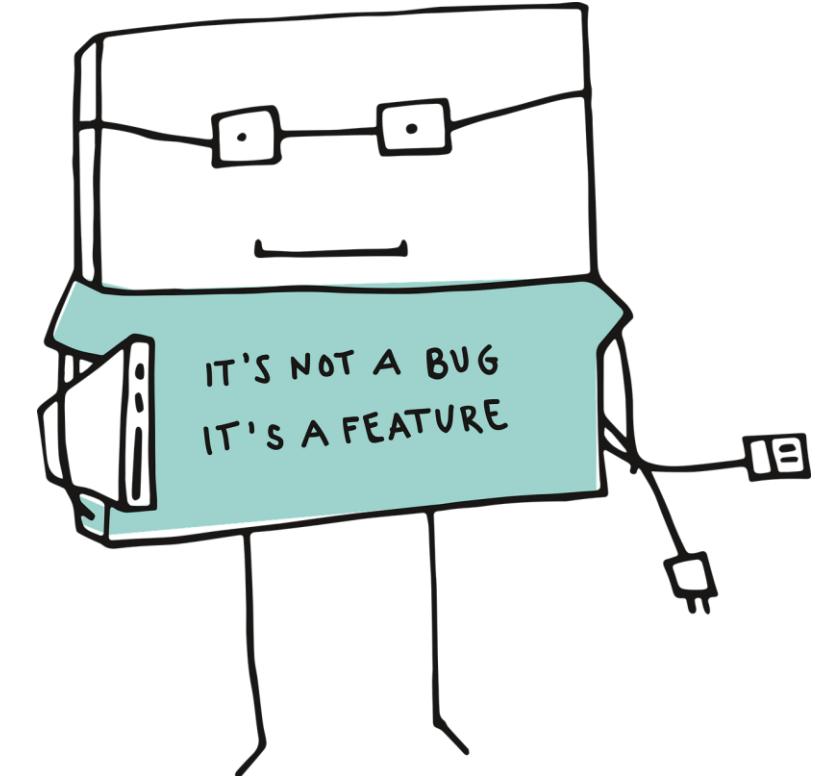
# Agenda

---

- Organisation
- Data management
- Reporting
- Collaborate
- Premium / Support
- Lessons learned
- Next steps



# Power BI Premium

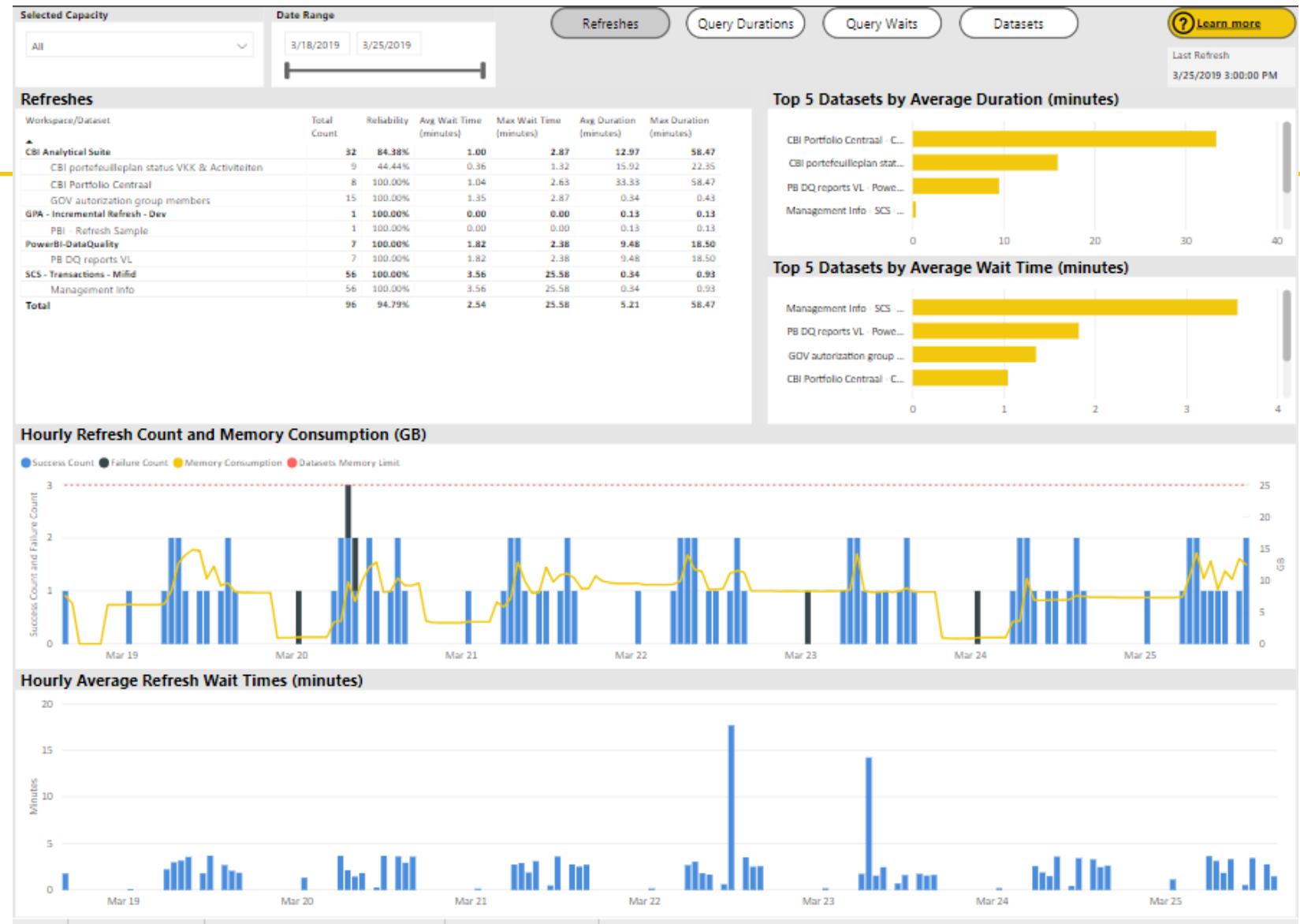


# Premium Capacity Metrics App

The screenshot shows the Microsoft Power Platform AppSource interface. On the left is a dark sidebar menu with the following items:

- Home (preview)
- Favorites
- Recent
- Apps
- Shared with me
- Workspaces
- My Workspace

The main content area features a search bar at the top with the placeholder "Search content...". Below it is a card for the "Power BI Premium Capacity Metrics" app, which includes a circular icon with a bar chart and diamond, the app name, and the date "MAR 18, 2019". To the right of this card is another card with a circular icon containing a window frame, the text "Get more apps from Microsoft AppSource", and a "Get apps" button.



# Monitoring licences

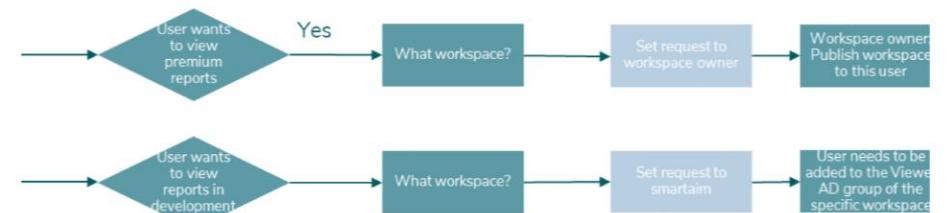
## Premium capacity

- Free viewers

The screenshot shows the Microsoft Power BI service interface. On the left, there are two filter panes: one for 'State' (Active, Deleted, Removing) and one for 'Type' (Group, PersonalGroup, Workspace). The main table lists various workspaces with their details:

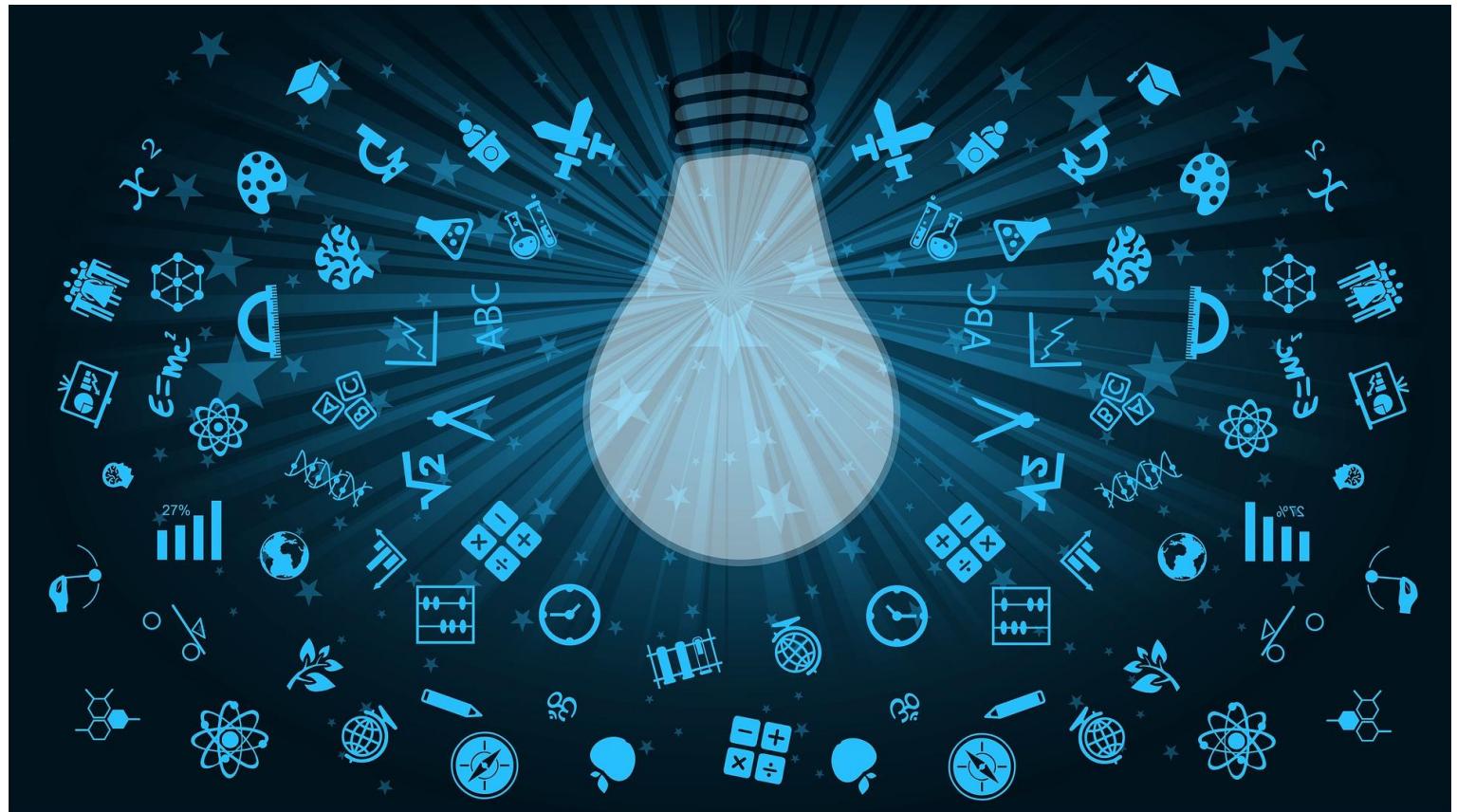
Name	Type	User Count	Report Count	Dashboard Count	State	Description
Advanced Analytics	Workspace	7	1	2	Active	Workspace for Advanced Analytics
Architectuur	Group	0	0	0	Active	
Azure Consumption Insights	Workspace	0	4	4	Removing	Azure Consumption Insights
Azure Enterprise Costs Pilot App Workspaces	Group	0	0	0	Removing	
Azure Reports & Dashboards	Workspace	1	2	0	Active	Workspace tbv Azure Reports & Dashboards
BB - Preventief Beheer	Workspace	7	2	0	Active	Preventief Beheer Tool
BI FRC & GRM	Group	0	1	0	Active	
Bijzonder Beheer - Management Informatie	Workspace	9	3	0	Active	App workspace voor Management Informatie tbv Bijzonder Beheer
Budget Vs. Forecast Report	Workspace	1	2	0	Active	
CBI Analytical Suite	Group	0	27	4	Active	
CBI Testomgeving	Group	0	15	0	Active	
Client Experience Center	Group	0	0	0	Active	
Client Solutions	Group	0	0	0	Active	
CS EFG Data and Analytics	Group	0	0	0	Active	
D&I Kennisteam Staven	Group	0	0	0	Active	
Data Science	Group	0	2	0	Active	
DGB leden	Group	0	0	0	Active	
DIAD - Rac	Workspace	0	1	1	Deleted	This is DIAD workspace

### License workflow



# Agenda

- Organisation
  - Data management
  - Reporting
  - Collaborate
  - Premium / Support
  - Lessons learned
  - Next steps



# Knowledge is key

---

- Power BI (re)training
- BI Focus Group
  - Start: changing content
  - Now: 2 tracks
    - End users
    - In-depth



# Professionalise Power BI administration

---

- Audit via Identity Management
- New workspaces: 3 (A)AD-groups
  - Admins, Members, Viewers
- Power BI **super users** create workspaces

# Personalised help button



Admin portal

Usage metrics

Users

Audit logs

Tenant settings

Capacity settings

Embed Codes

Organization visuals

Dataflow settings (preview)

Workspaces

## Help and support settings

Publish "Get Help" information



Organization

You can go to internal help and support resources from the Power

Getting started

Learn

Community

Get help

Power BI for developers

Privacy & cookies

Accessibility shortcuts

About Power BI

[https://fms-ts-bi/EqbhZW2ovNBGoiqtsKCGwMQBeDJCATlu\\_03B4X](https://fms-ts-bi/EqbhZW2ovNBGoiqtsKCGwMQBeDJCATlu_03B4X)

<https://fms/Sites/ts-bi/Lists/Power%20BI%20Forum/AllItems.aspx>

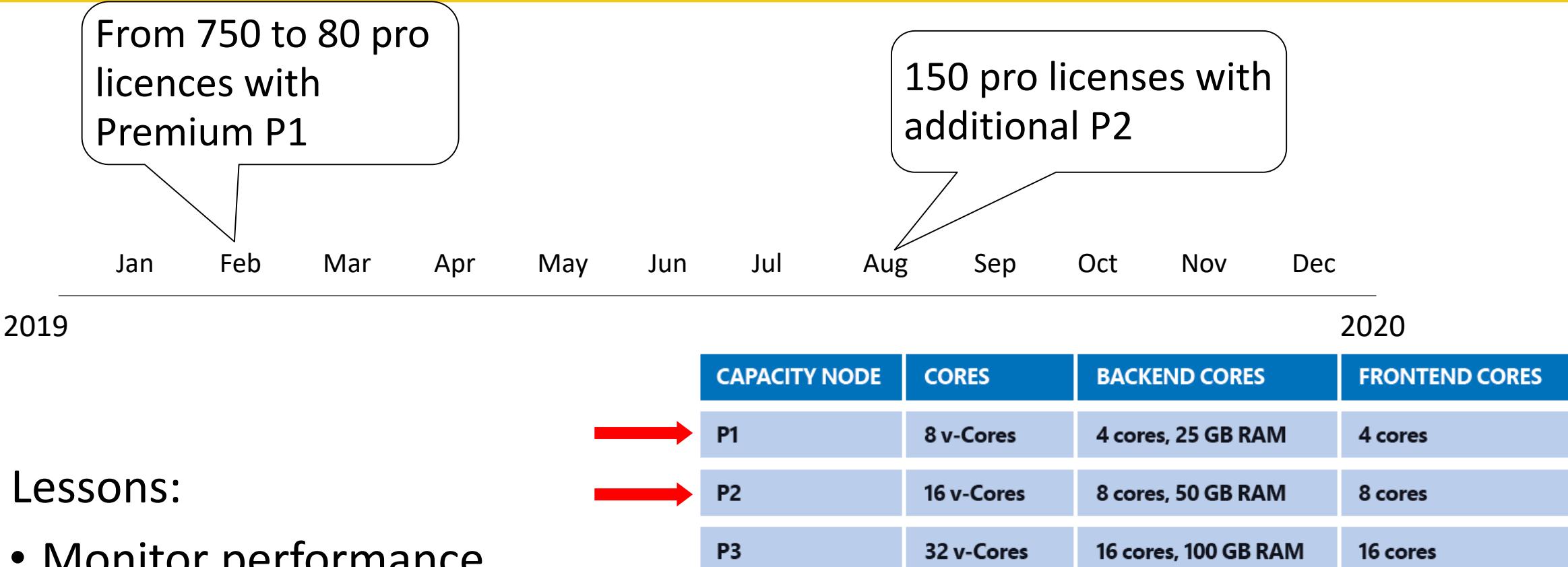
<https://ern.nl/tas/public/ssp/content/serviceflow?unid=9f20456baae34>

<https://ern.nl/tas/public/ssp/content/serviceflow?unid=0ec6987f62654>

Apply to:

- The entire organization
- Specific security groups

# Additional Premium Capacity



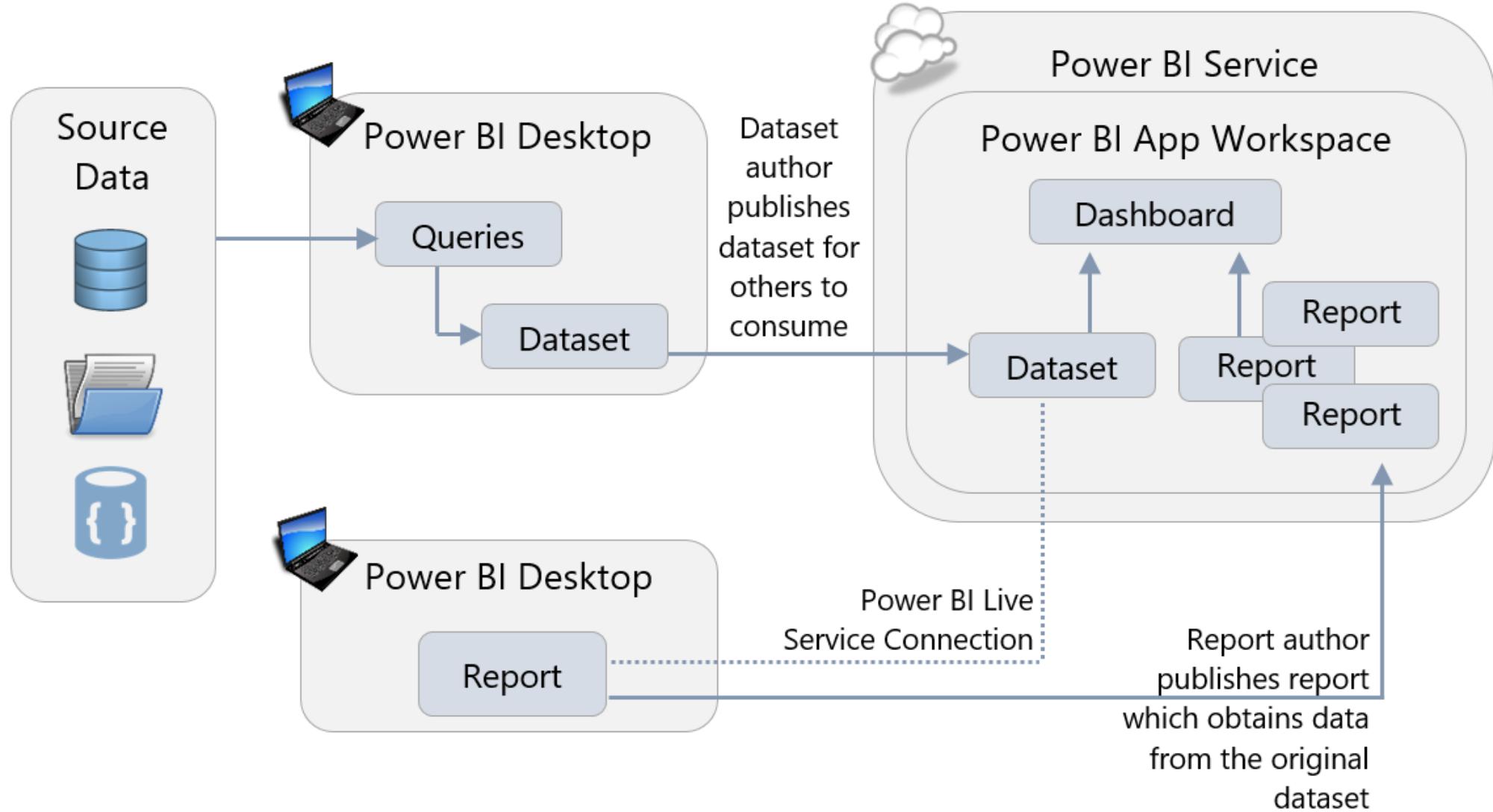
## Lessons:

- Monitor performance
- (We should be) Optimising data models

# Best Practices

---

- 40 Best practices (Power BI Cheat Sheet)
  - Power Query, Data Model, Visualization, Miscellaneous
- Naming conventions
  - Workspaces: *Department – Team – Name*
  - Gateway Data Sources: *Type – Server – Database*
    - Power BI Idea: [Add the ability to Sort and Categorize Gateway Data Sources](#)
- OneDrive for version control
- Monitor Premium capacity
- Choose Azure region wisely
- Promote/certify datasets
- Disconnect the dataset from report development



# Agenda

---

- Organisation
- Data management
- Reporting
- Collaborate
- Premium / Support
- Lessons learned
- **Next steps**



# Roadmap and a look into the future

---

The present is always on the move; this is called future...

Already started:

- Automatic dataset refresh (PowerShell or **Flow!**)
- App workspace creation and pro license workflow



# Roadmap and a look into the future

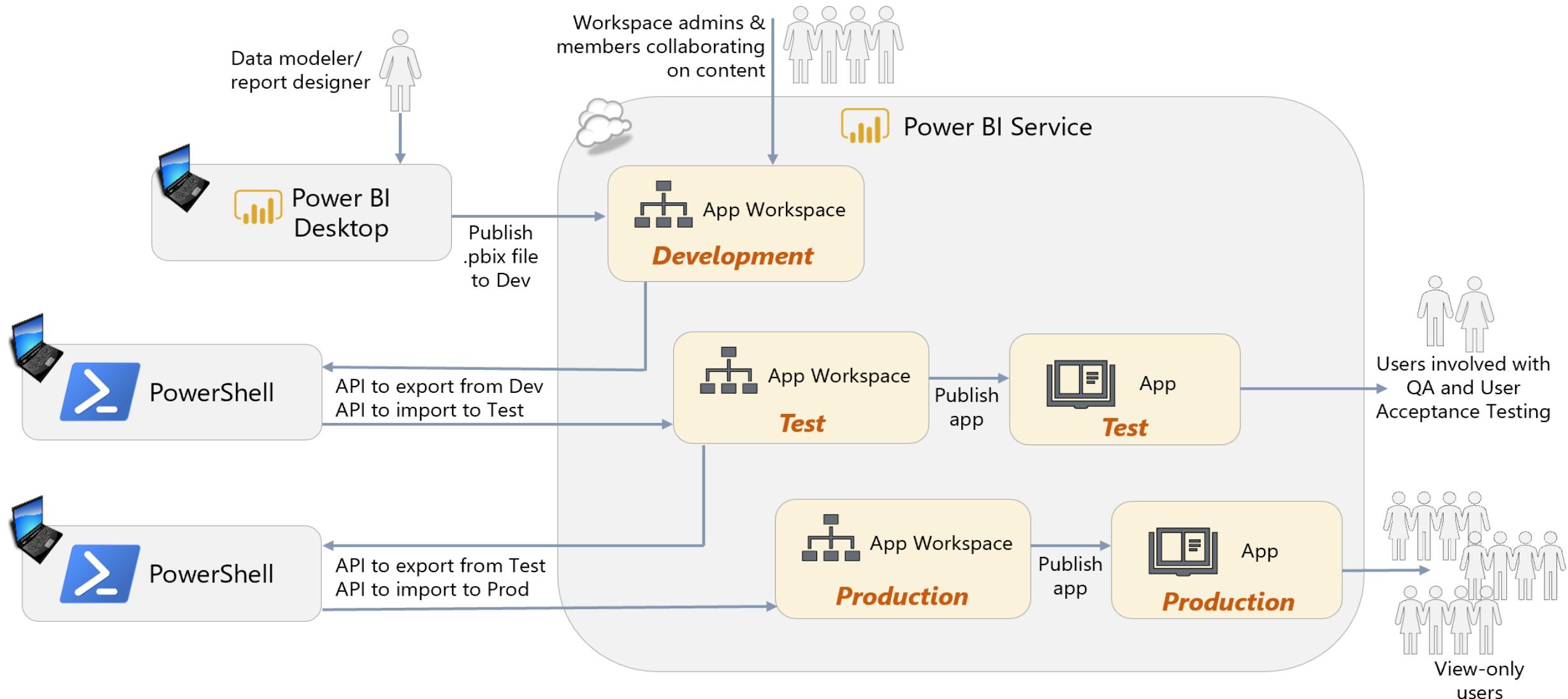
---

The present is always on the move; this is called future...

To do:

- **New workspace** migration (Microsoft)
- Check use cases of **dataflows** and **PowerApps**
- Long term **logging** (Premium) and **monitor** usage
- Development Pipeline / Continuous Delivery

# Roadmap – development pipeline



# Power BI (Premium) resources

---

- [Power BI Premium FAQ](#)
- [Whitepaper: Deploying and Managing Power BI Premium Capacities](#)
- [Power BI Premium: Licensing and Capacity Made Easy](#)
- [Whitepaper: Planning a Power BI Enterprise Deployment](#)
- [Whitepaper: Power BI Premium](#)
- [All Power BI whitepapers:](#)
- [Power BI Best practices: Power BIbible](#)
- [Power BI Idea for sorting Gateway Data Sources](#)
- [Power BI Cheat Sheet: http://bit.ly/cheatsheetpbi](#)
- [Pixabay.com for free images](#)

# Thank you and let's connect!

-  n.vanvroenhoven@vanlanschotkempen.com
-  NickyvV.com
-  @NickyvV
-  www.linkedin.com/in/nickyvanvroenhoven/