



\*PASS

SQLSATURDAY Belgium, Mechelen #SQLSatBe

# Tips & Tricks of a Power BI Premium Implementation

## in a Financial Institute

Nicky van Vroenhoven

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





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SQLSATURDAY Belgium, Mechelen #SQLSatBe

# Tips & Tricks of a Power BI Premium Implementation

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Microsoft Azure

DELL Technologies

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# Evaluations

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The screenshot shows a session page for "Tips & Tricks of a Power BI Implementation at a Financial Institute" by Nicky van Vroenhoven. The page includes details like duration (60 minutes), level (Intermediate), and track (Analytics). A green "EVALUATE SESSION" button is visible.

\*PASS  
SQLSATURDAY  
BELGIUM | 07 MAR 2020

Sessions ^ Speakers Sponsors ▾

Tips & Tricks of a Power BI Implementation at a Financial Institute

Speaker: Nicky van Vroenhoven

Duration: 60 minutes

Level: Intermediate

Track: Analytics

EVALUATE SESSION

The screenshot shows the "Sessions" dropdown menu open, with the "Session Evaluation" option highlighted.

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SQLSATURDAY  
BELGIUM | 07 MAR 2020

Sessions ^ Speakers Sponsors ▾

Schedule  
Submitted Sessions  
Build Schedule  
Session Evaluation

SATURDAY 956  
gium

# Microsoft Office Lens app

Android

iOS



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



# Microsoft Office Lens app

**without** Lens



**with** Lens



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



# Nicky van Vroenhoven

- Lead Expert Data management
- Van Lanschot Kempen

 @NickyvV

 nickyvv.com

 Power BI Super User  
[community.powerbi.com](http://community.powerbi.com)

- Power BI Days Dutch chapter co-founder 



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



Home



## Netherlands . Power BI Days 2020-04



Event Date

April 8, 2020



Event Location

PanCompany Europalaan  
12a 5232 BC 's-  
Hertogenbosch



Limited Places

30



Organizer

nvanvroenhoven@gmail.com

# Who Are You?

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<http://bit.ly/sqlsatbe>

The screenshot shows a survey page with a green header. The title is "Who Are You? (#SQLSatBE)". Below it is a small image of a town square. The text "SQL Saturday Belgium, Mechelen, March 2020." is displayed, followed by "All answers will be deleted after this session." The form contains two questions: "1. What is your first name?\*" with a text input field labeled "Voer uw antwoord in". The second question is "2. What is your continent of origin?" with two radio button options: "Africa" and "Antarctica".

# Agenda

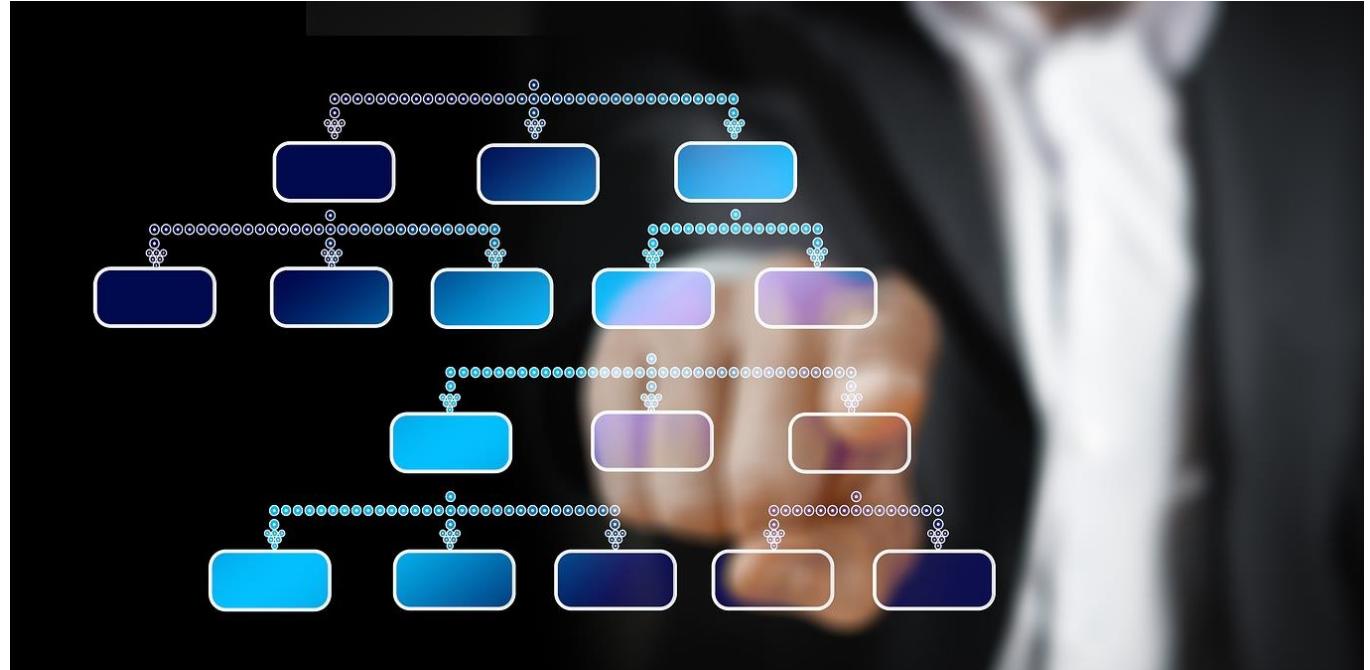
---

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

# Agenda

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



# Van Lanschot Kempen

## a specialised wealth manager

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Van Lanschot Kempen, a union of two specialized financial boutiques, is the oldest independent financial institution in the Netherlands.

**Mission:** creation and preservation of wealth of our customers



Specialised in the future  
since 1737

# evi



Everyone deserves Evi



Pronounced personally

# Kempen



turning dedication into  
dazzling prospects

Show results from:

2019 ▾

Annual results

Trading updates

Half-year results

Client assets

€ 102.0 billion

Net result

€ 98.4 million

Balance sheet total

€ 14.3 billion

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

€ 98.4 million

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

23.8 %

Efficiency ratio

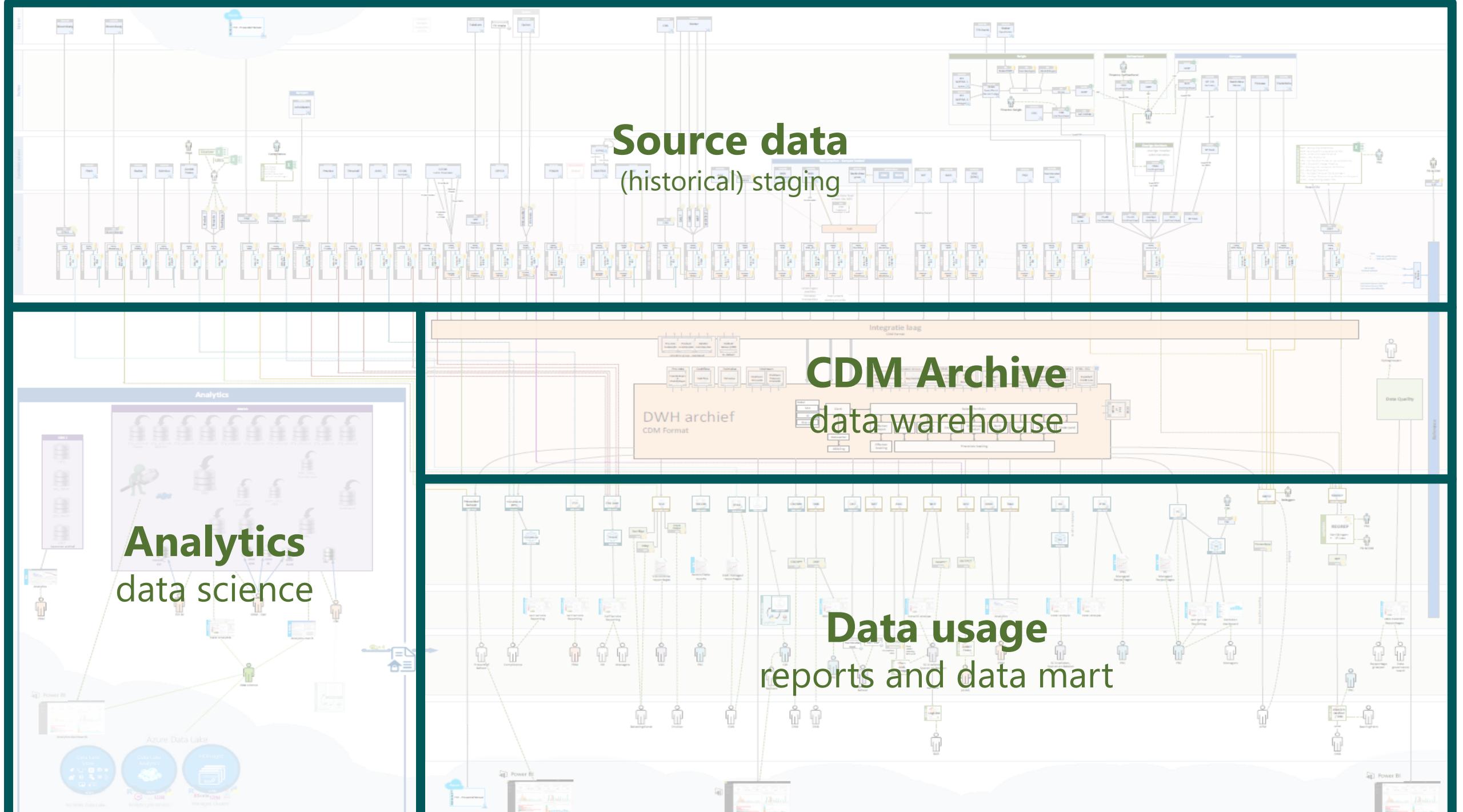
75.5 %

# Agenda

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





**Source data**  
(historical) staging

**CDM Archive**  
data warehouse

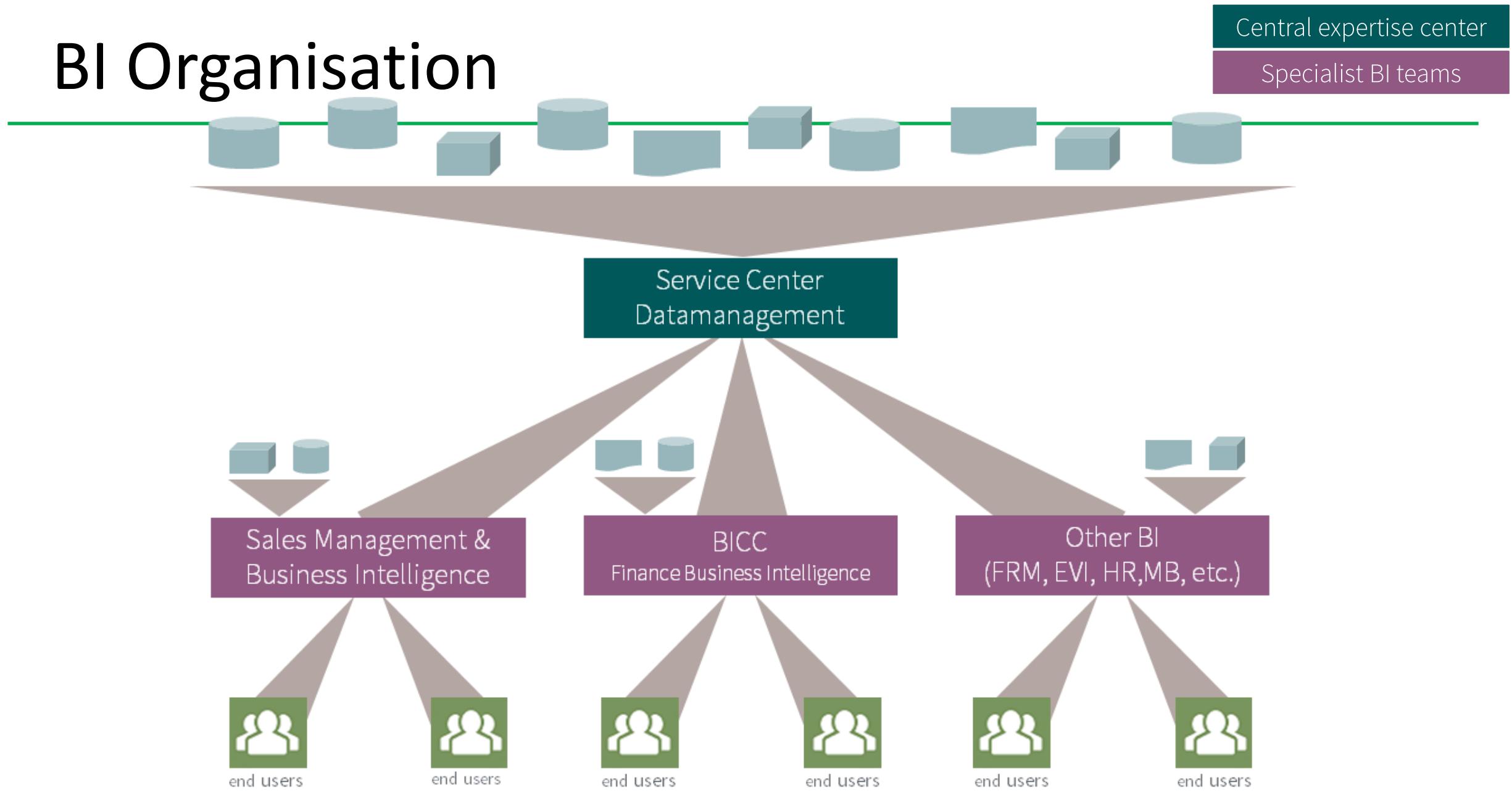
**Analytics**  
data science

**Data usage**  
reports and data mart

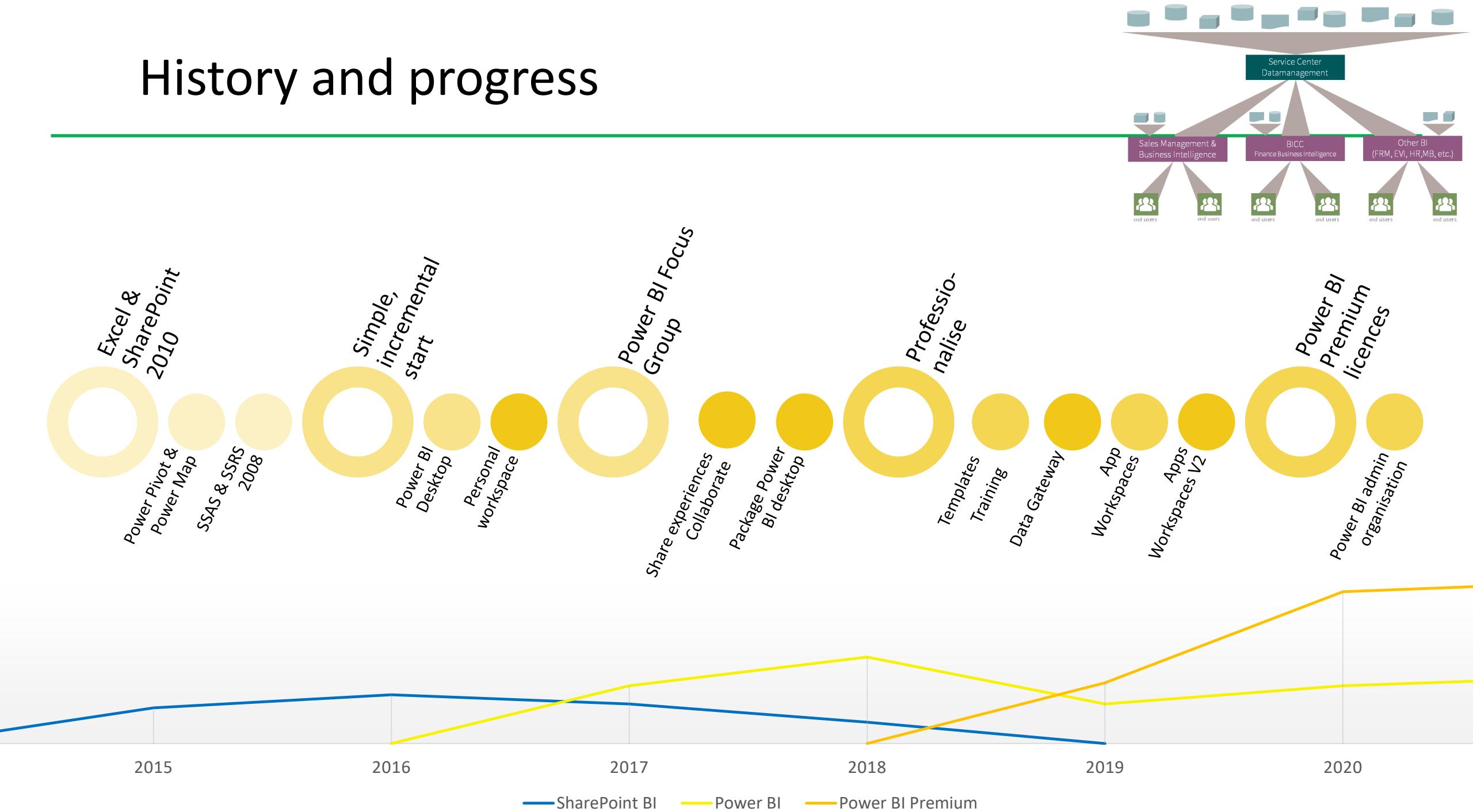


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								Data Space (GB) 30		Free Space (GB) 40			
Data Space (GB) 222	Index Space (GB) 205	Data Space (GB) 119	Free Space (GB) 27	Data Space (GB) 67	Index Space (GB) ...	Data Space (GB) 51	Free ...	Free Spa...	Index S...	Data Sp...	Index ...	Data Space (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...
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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

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*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

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

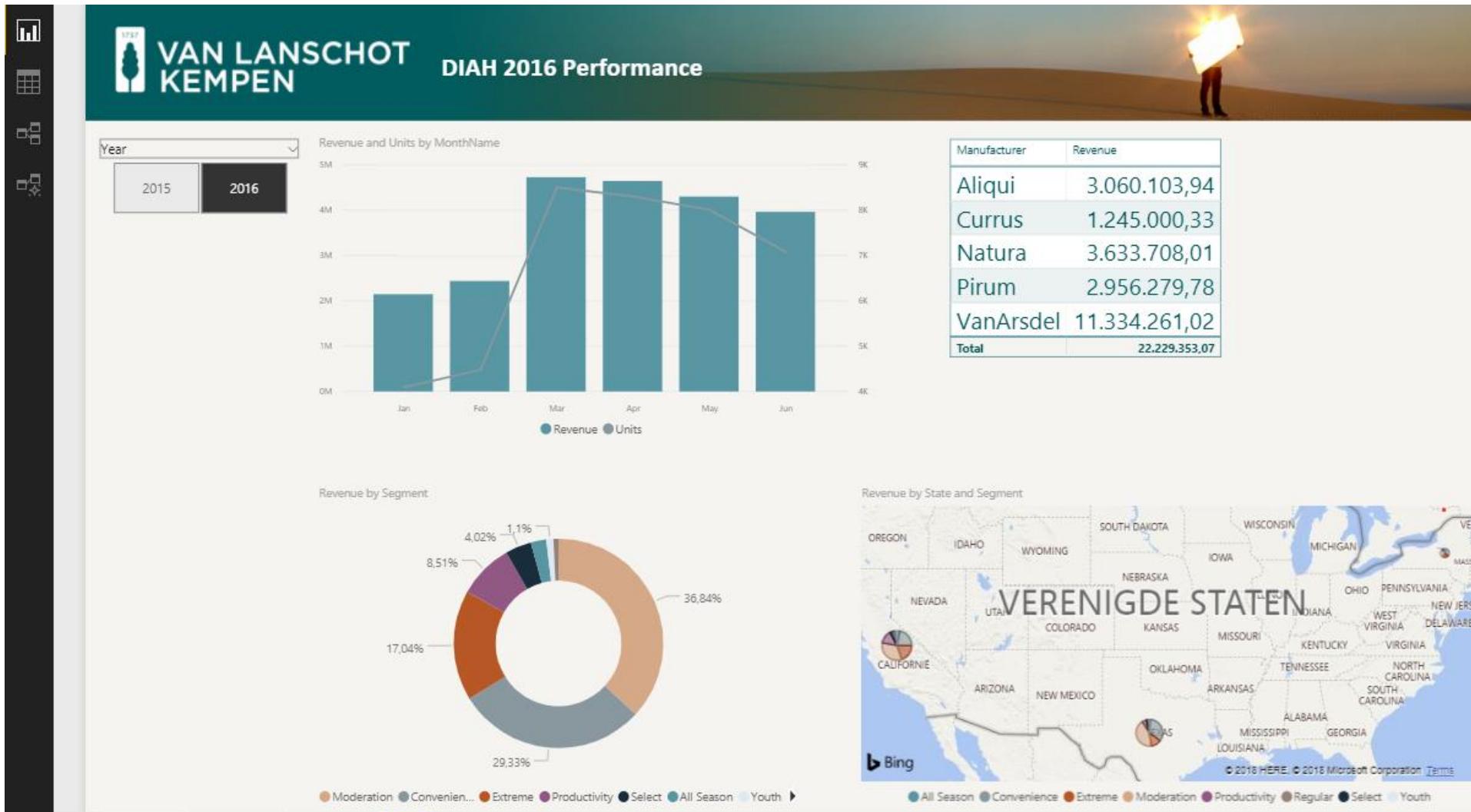


# Power BI at VLK

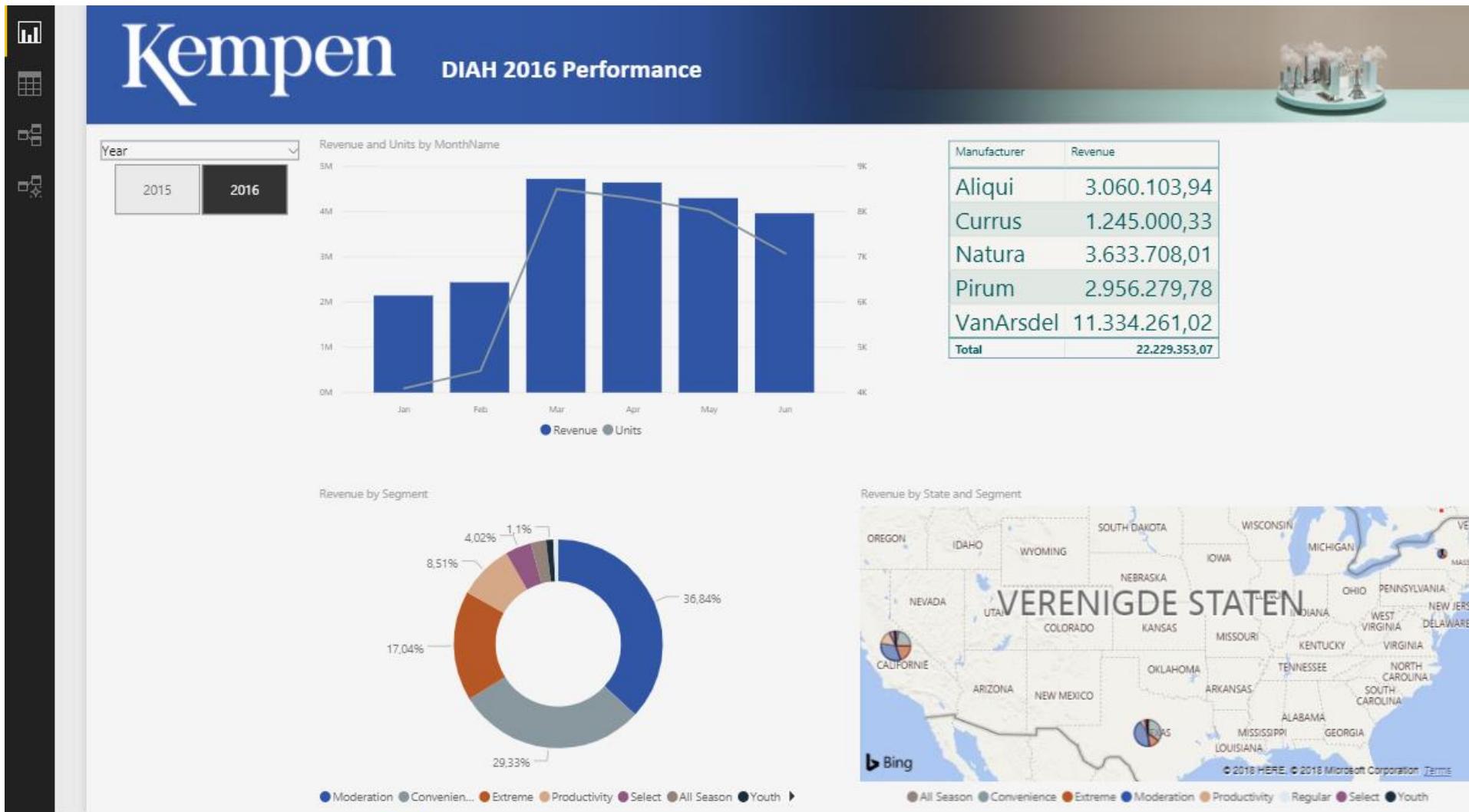
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- Templates
  - VLK, VL, Kempen, Evi

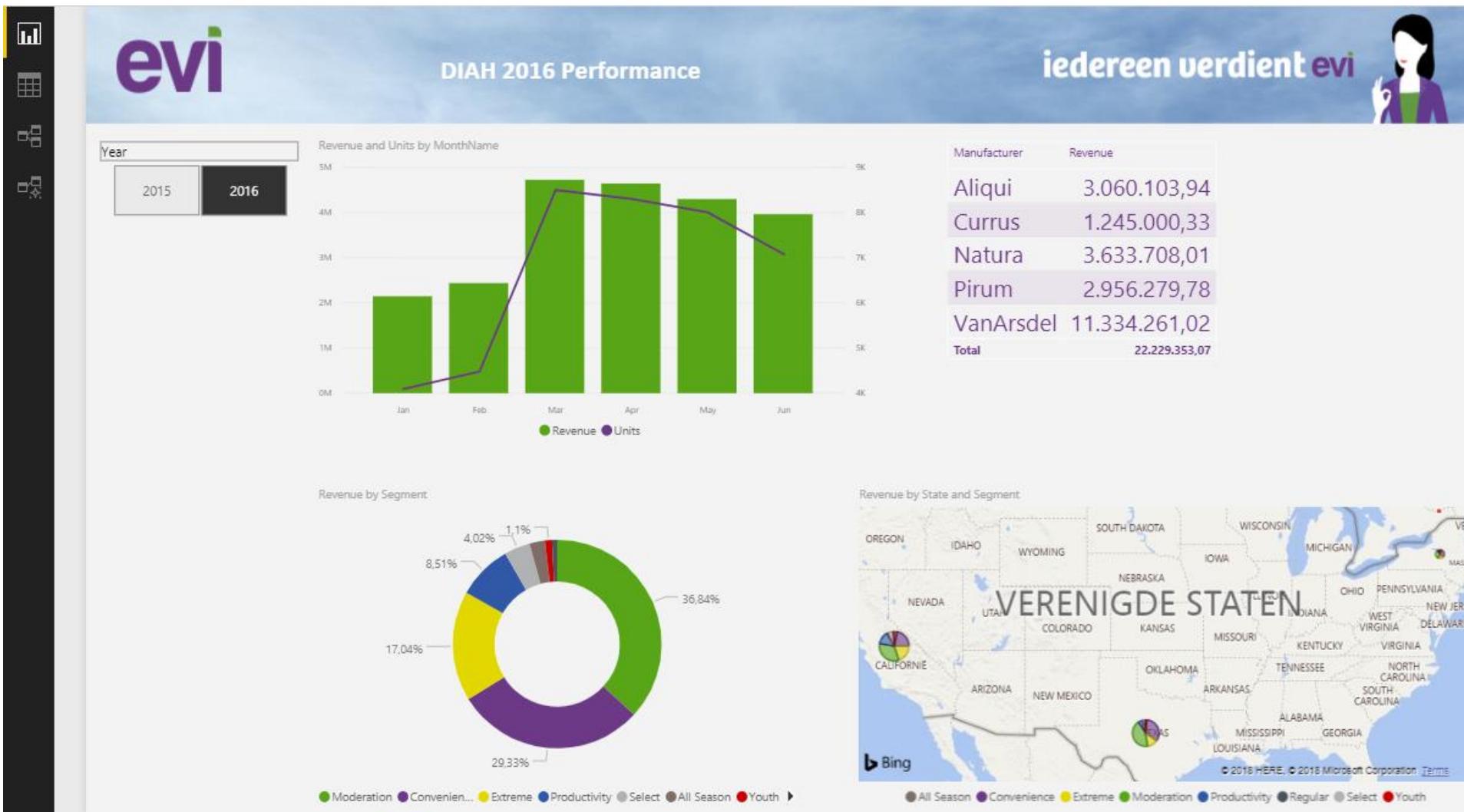
# Power BI at VLK



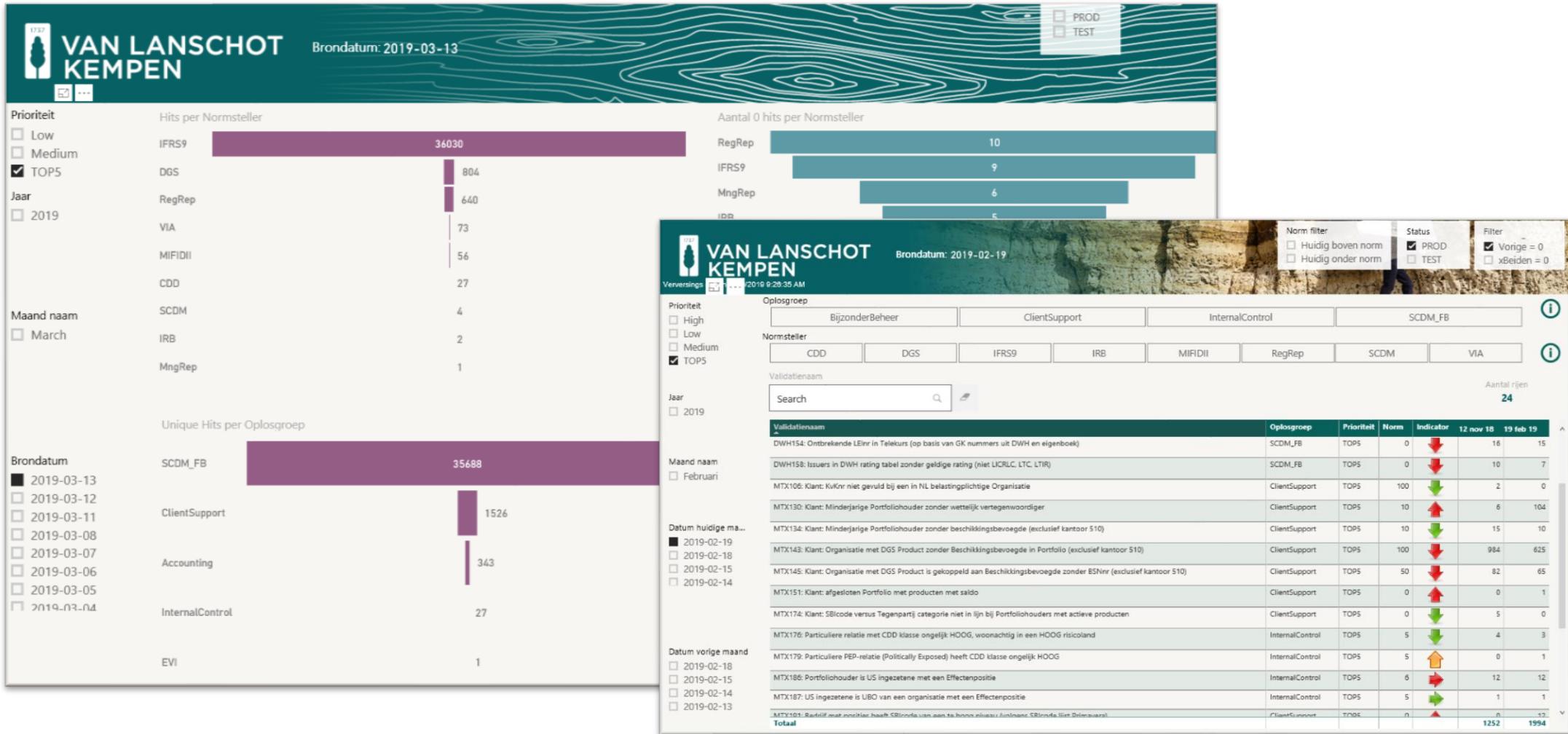
# Power BI at VLK



# Power BI at VLK



# Data Quality dashboard in Power BI



# Weekoverzicht suspicious cases

Huidige week

**2018-47**

11/19/2018 WeekStart    11/25/2018 WeekEnd

relatienvr

All ▾

segment

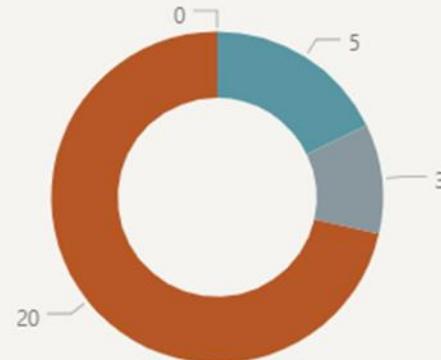
All ▾

weeknr

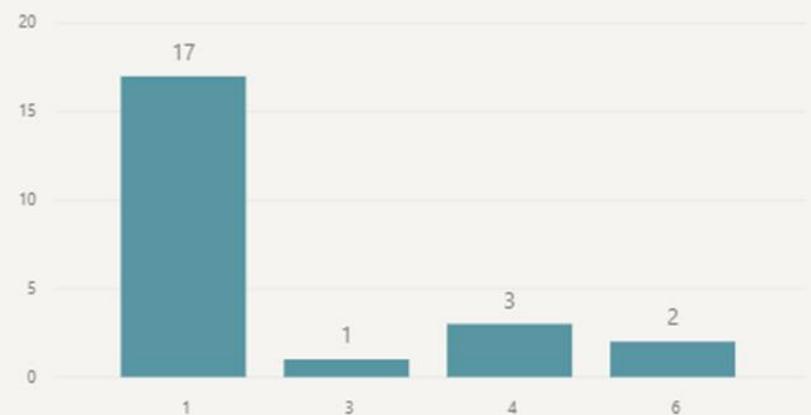
2018-36 ▾

weeknr	relatienvr	naam	type	segment	# bet.trans	# eff.trans	# keywords	# watchlist	Σ bet.trans	Σ eff.trans	Σ keywords	Σ watchlist	weg...
2018-36			Private Individual	1	0	0	1	0	0	0	3	0	True
2018-36			Legal Entity	NPO	1	0	0	0	2	0	0	4	False
2018-36			Private Individual	1	0	0	4	0	0	0	4	0	False
2018-36			Legal Entity	CORP	1	0	0	0	2	0	2	0	False
2018-36			Private Individual	3	0	0	1	0	0	0	3	1	False
2018-36			Private Individual	3	0	0	3	0	0	0	3	0	False
2018-36			Private Individual	3	0	0	1	0	0	0	1	0	False

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

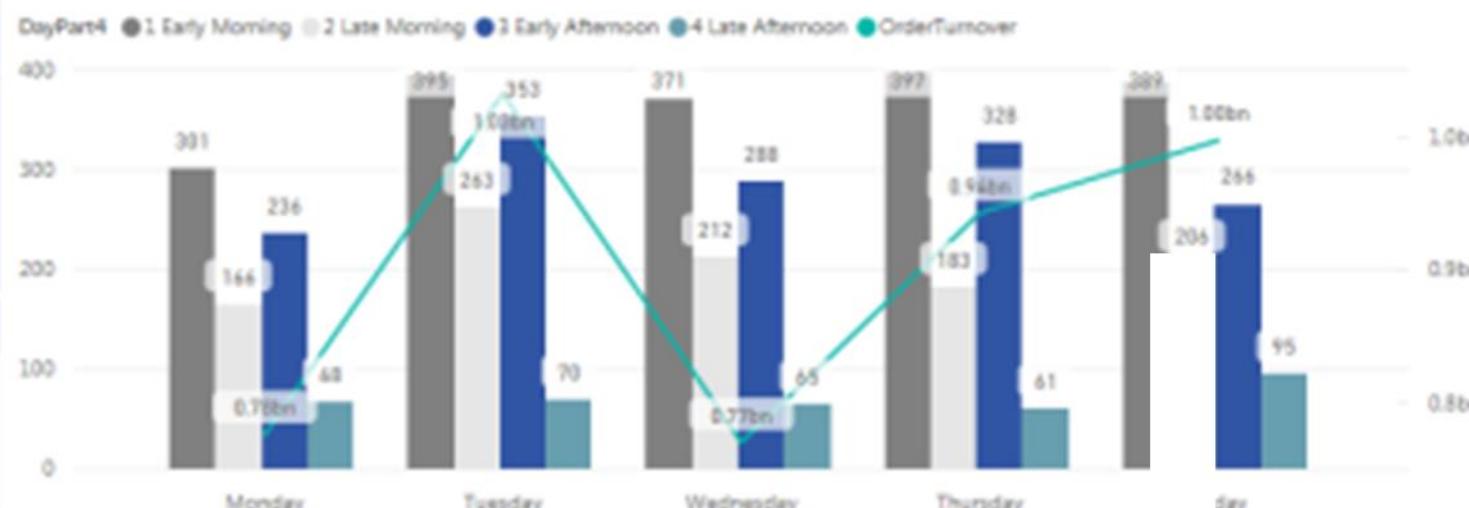
TRADE ANALYZER

Kempen

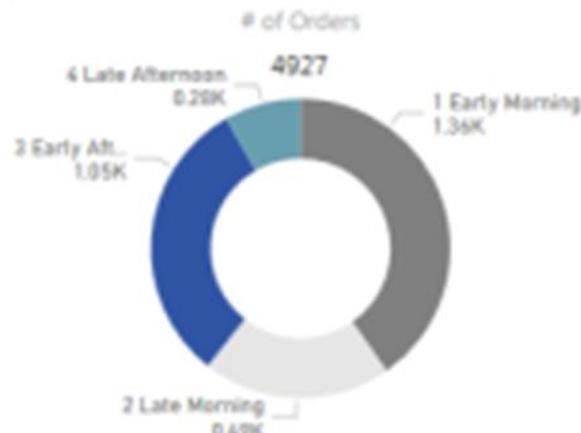
# of Orders by Country Listed



# of Orders per day of the week



Commission Booked



Bing

Datum

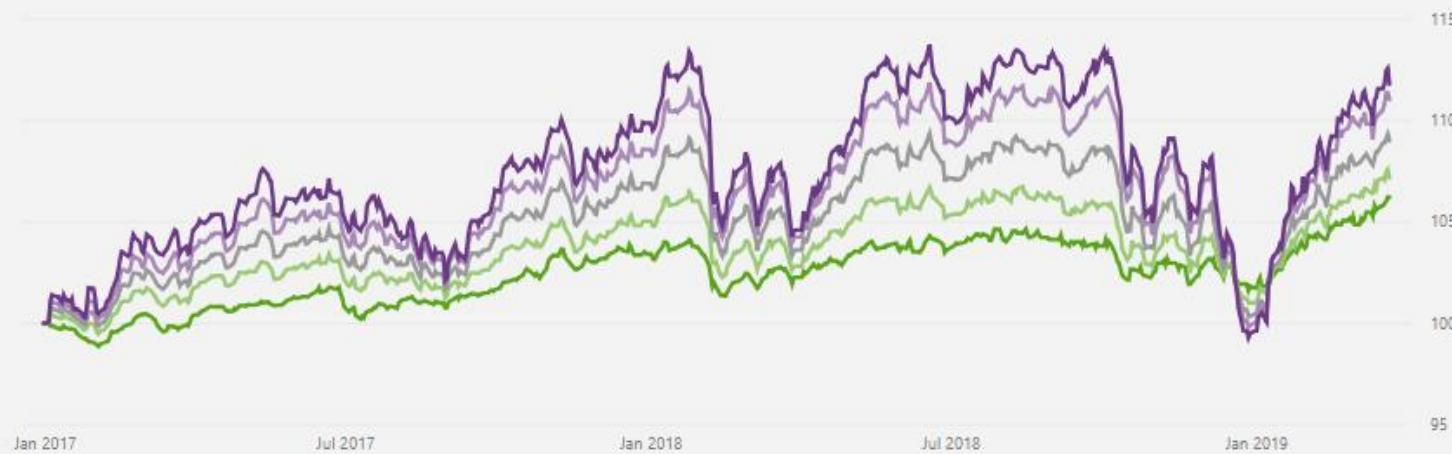
12/31/2016 3/22/2019

iedereen verdient evi



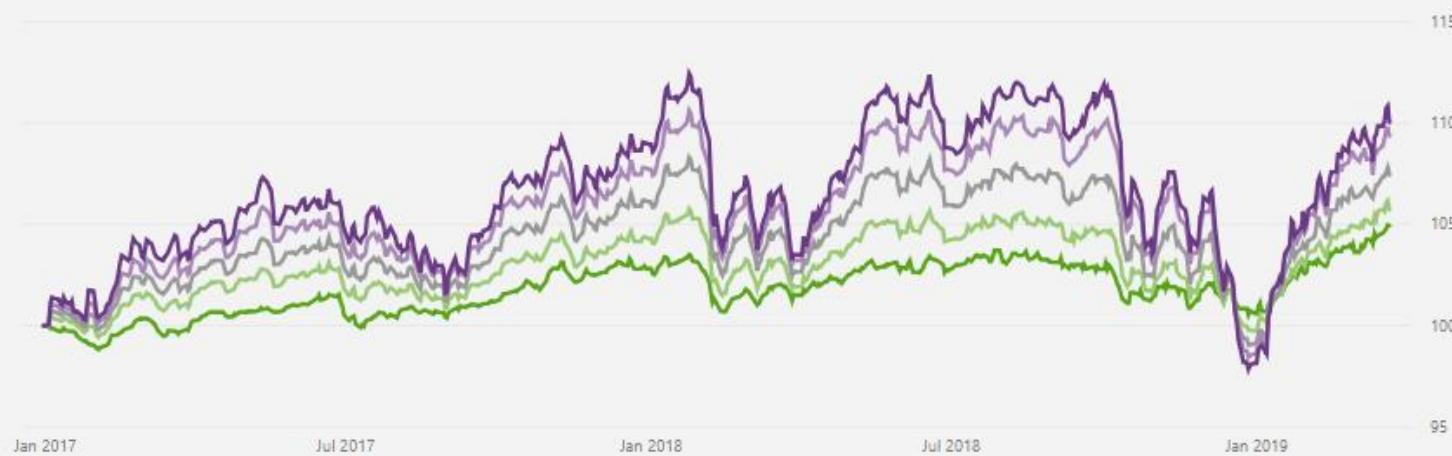
Bruto performance van de modelportefeuilles

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

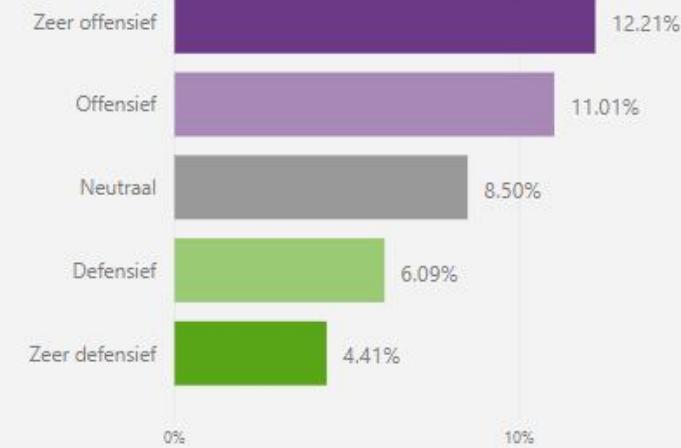
**Bruto**

Netto performance van de modelportefeuilles

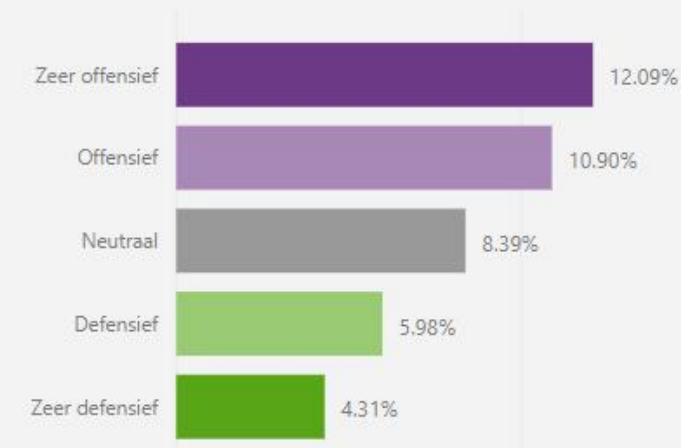
Modelportefeuille — Zeer defensief — Defensief — Neutraal — Offensief — Zeer offensief

**Netto**

Bruto performance YTD per modelportefeuille



Netto performance YTD per modelportefeuille



# Power BI at VLK

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- 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 Power BI Admin portal interface. On the left, a sidebar lists various administrative options: Usage metrics, Users, Audit logs, Tenant settings, Capacity settings, Embed Codes, Organizational visuals, Dataflow settings, Workspaces, and Custom branding. The 'Custom branding' option is selected and highlighted with a red box. The main content area is titled 'Custom branding' and contains three sections: 'Logo', 'Cover image', and 'Theme color'. The 'Logo' section includes a placeholder circular image of a person, an 'Upload' button, and a 'Delete' button. The 'Cover image' section has a similar structure. Below these, the 'Theme color' section shows a color swatch with the hex code #323130. A large red box highlights the entire top navigation bar and the main content area. At the bottom, there is a navigation bar with icons for Home, Recent, Favorites, and Help, followed by a greeting 'Good afternoon, Nicky', a search bar, and a 'Snelle toegang' (Quick access) button.

# Agenda

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

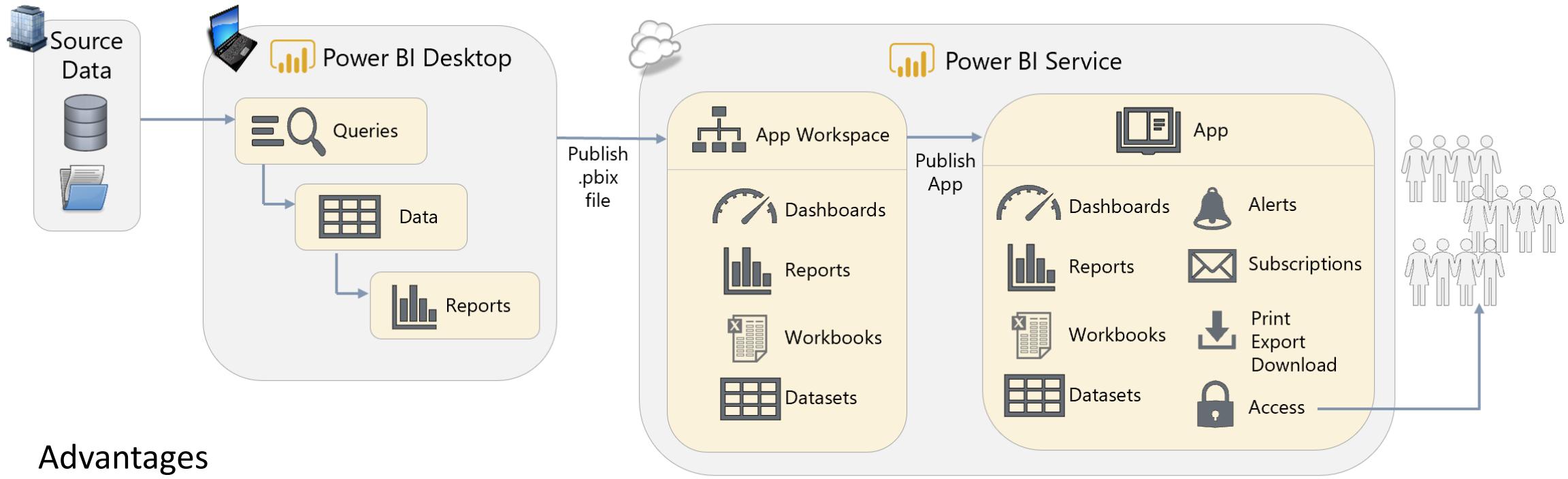


# Power BI Workspaces and Apps

The screenshot shows the Power BI interface with a red 'X' over the 'Share' button in the top left. A yellow arrow points from the 'Share' button to the 'Workspaces' option in the 'Shared with me' section. A yellow oval highlights the 'Workspaces' option. To the right, the 'Share dashboard' dialog is open, showing the 'Share' tab selected. It displays the message: 'Recipients will have the same access as you unless row-level security on the dataset further restricts them. [Learn more](#)'. Below that is a 'Grant access to' section with an 'Enter email addresses' field and an optional message field. At the bottom, three checkboxes are shown, with the first one checked and highlighted by a red box:

- Allow recipients to share your dashboard
- Allow users to build new content using the underlying datasets
- Send email notification to recipients

# Power BI Workspaces and Apps



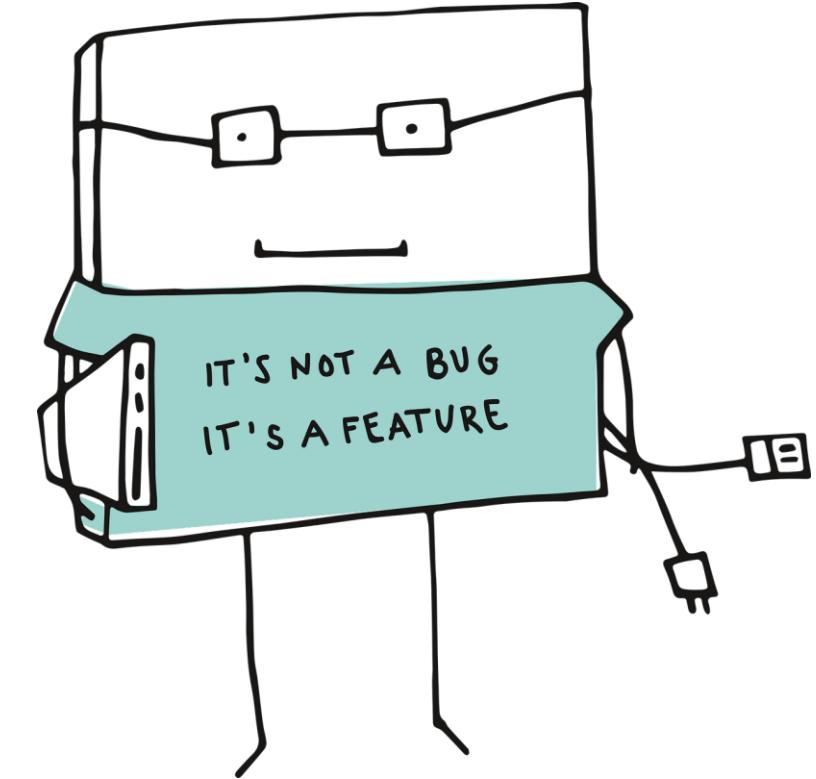
# Agenda

---

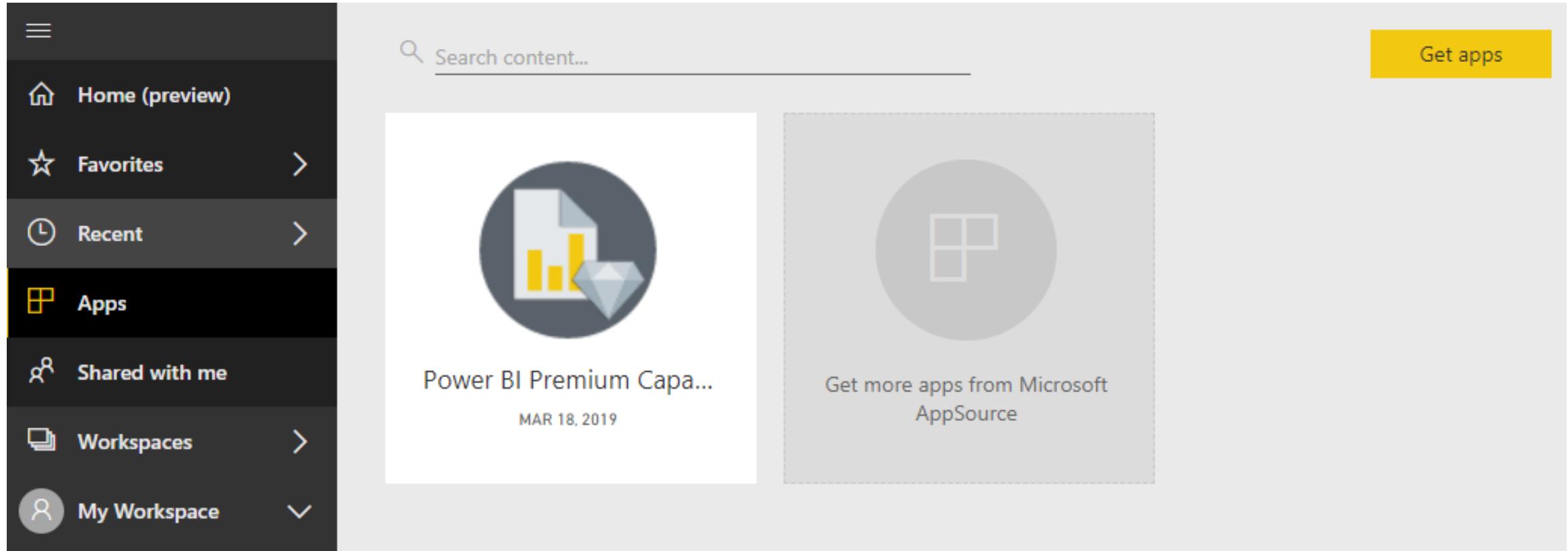
- Organisation
- Data management
- Reporting
- Collaboration
- **Premium / Support**
- Lessons learned
- Next steps

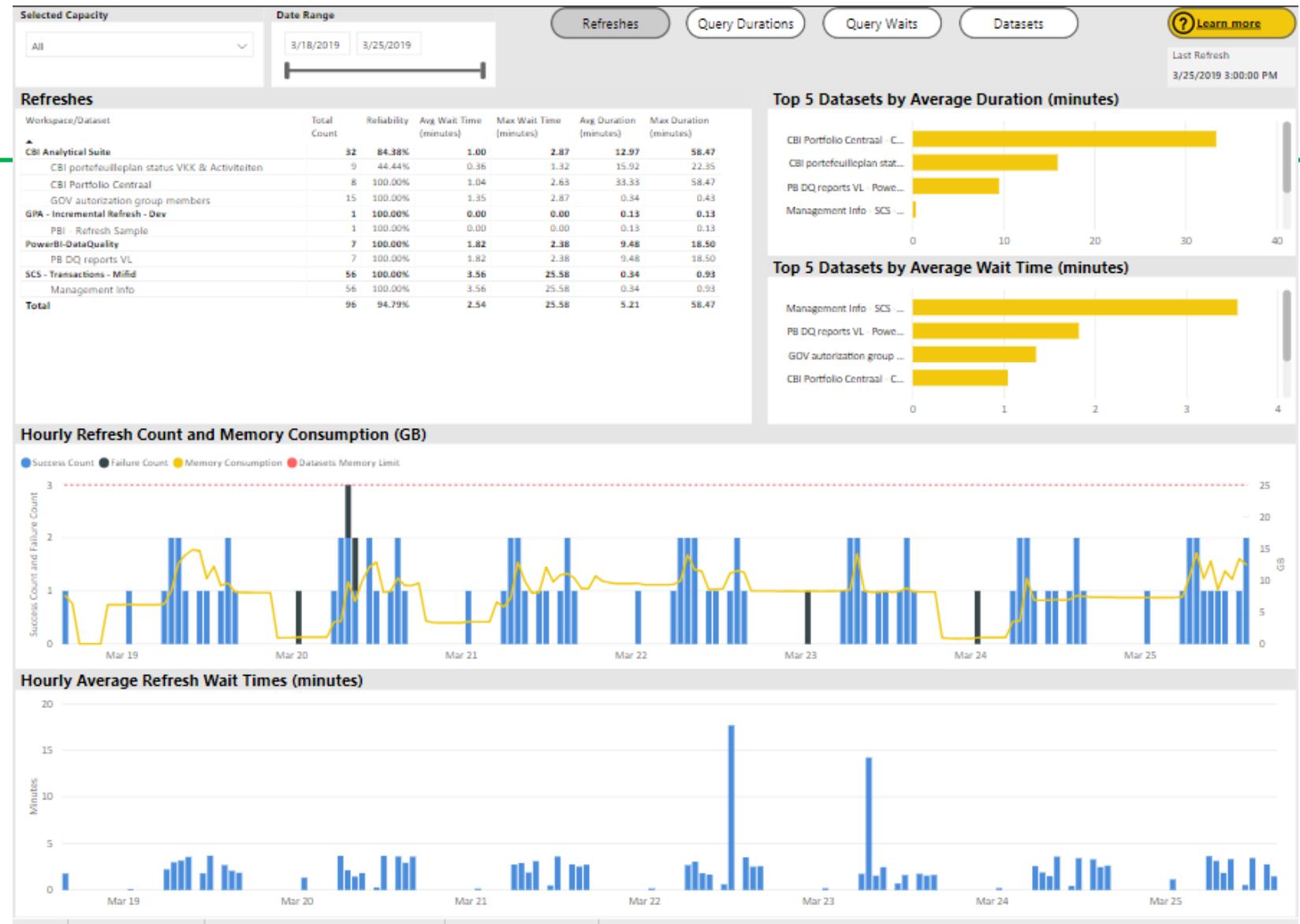


# Power BI Premium



# Premium Capacity Metrics App





# Monitoring licences

## Premium capacity

- Free viewers

The screenshot shows the Power BI service interface with a focus on workspace management. On the left, there are two filter panes: one for 'State' (Active, Deleted, Removing) and one for 'Type' (Group, PersonalGroup, Workspace). The main area displays a table of workspaces with columns for Name, Type, User Count, Report Count, Dashboard Count, State, and Description.

Workspace 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

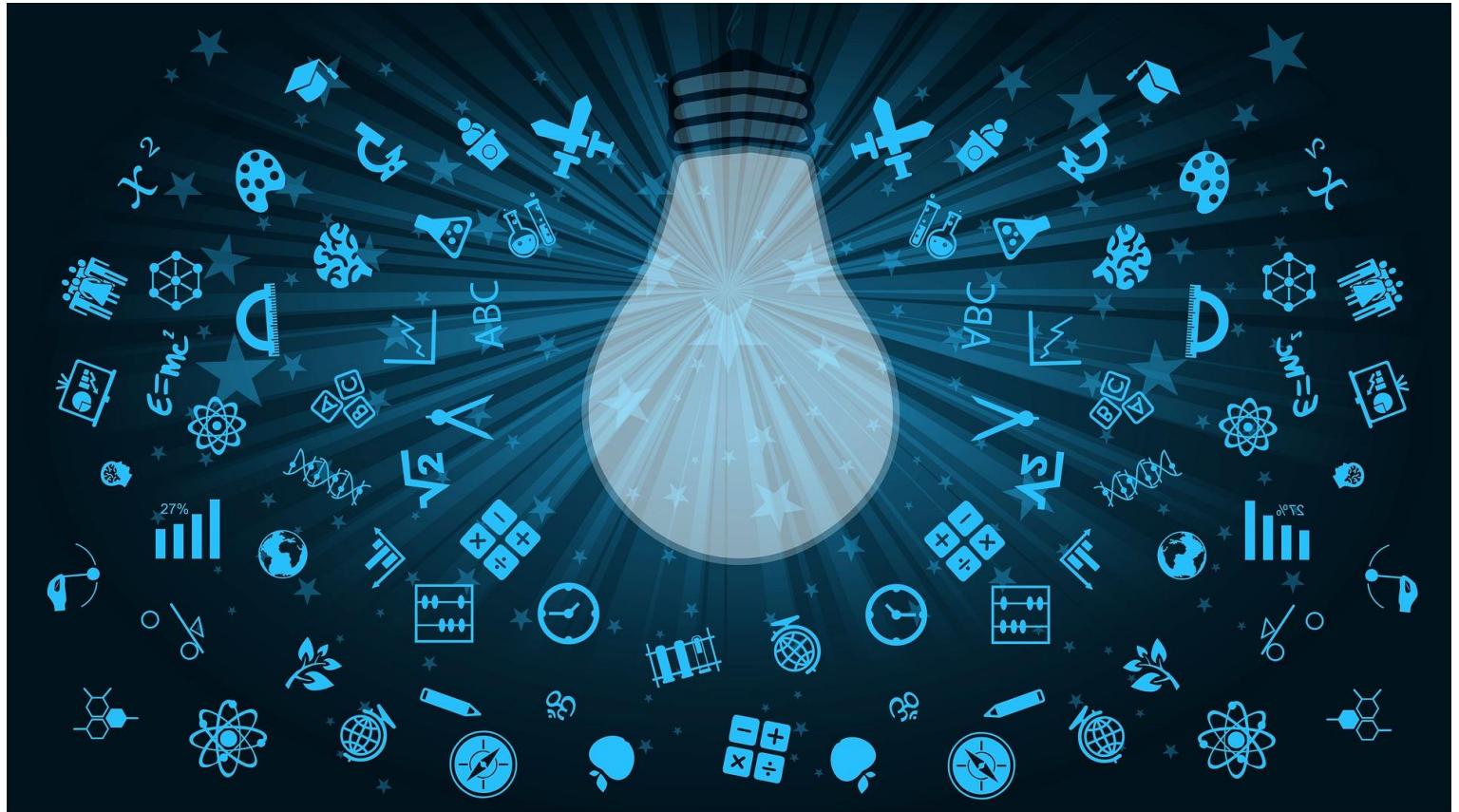
On the right, a flowchart titled "License workflow" illustrates the process for managing workspace requests:

```
graph LR
    A{User wants to view premium reports} -- Yes --> B[What workspace?]
    B --> C[Set request to workspace owner]
    C --> D[Workspace owner Publish workspace to this user]
    A -- No --> E{User wants to view reports in development}
    E --> F[What workspace?]
    F --> G[Set request to smartalm]
    G --> H[User needs to be added to the Viewers AD group of the specific workspace]
```

# Agenda

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



# Knowledge is key

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- 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

Getting started

Learn

Community

Get help

Power BI for developers

Privacy & cookies

Accessibility shortcuts

About Power BI



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

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

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

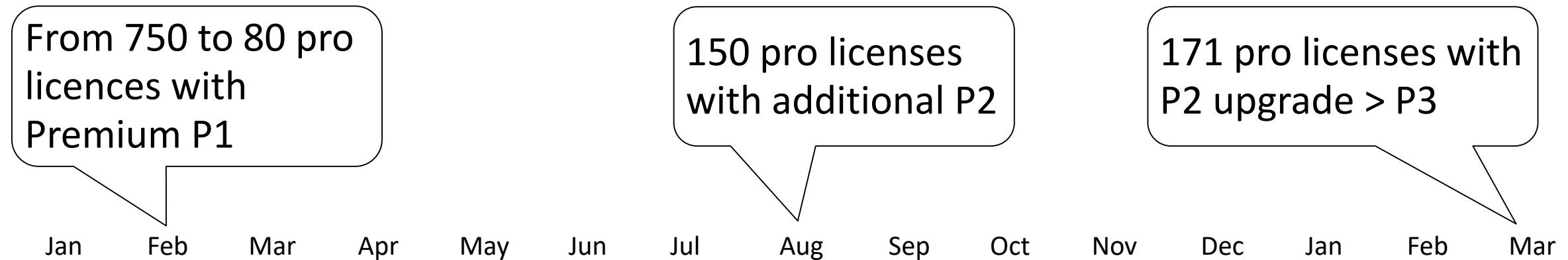
<https://ern.nl/tas/public/ssp/content/serviceflow?unid=0ec6987f62654>

Apply to:

The entire organization

Specific security groups

# Additional Premium Capacity



2019 2020

## Lessons:

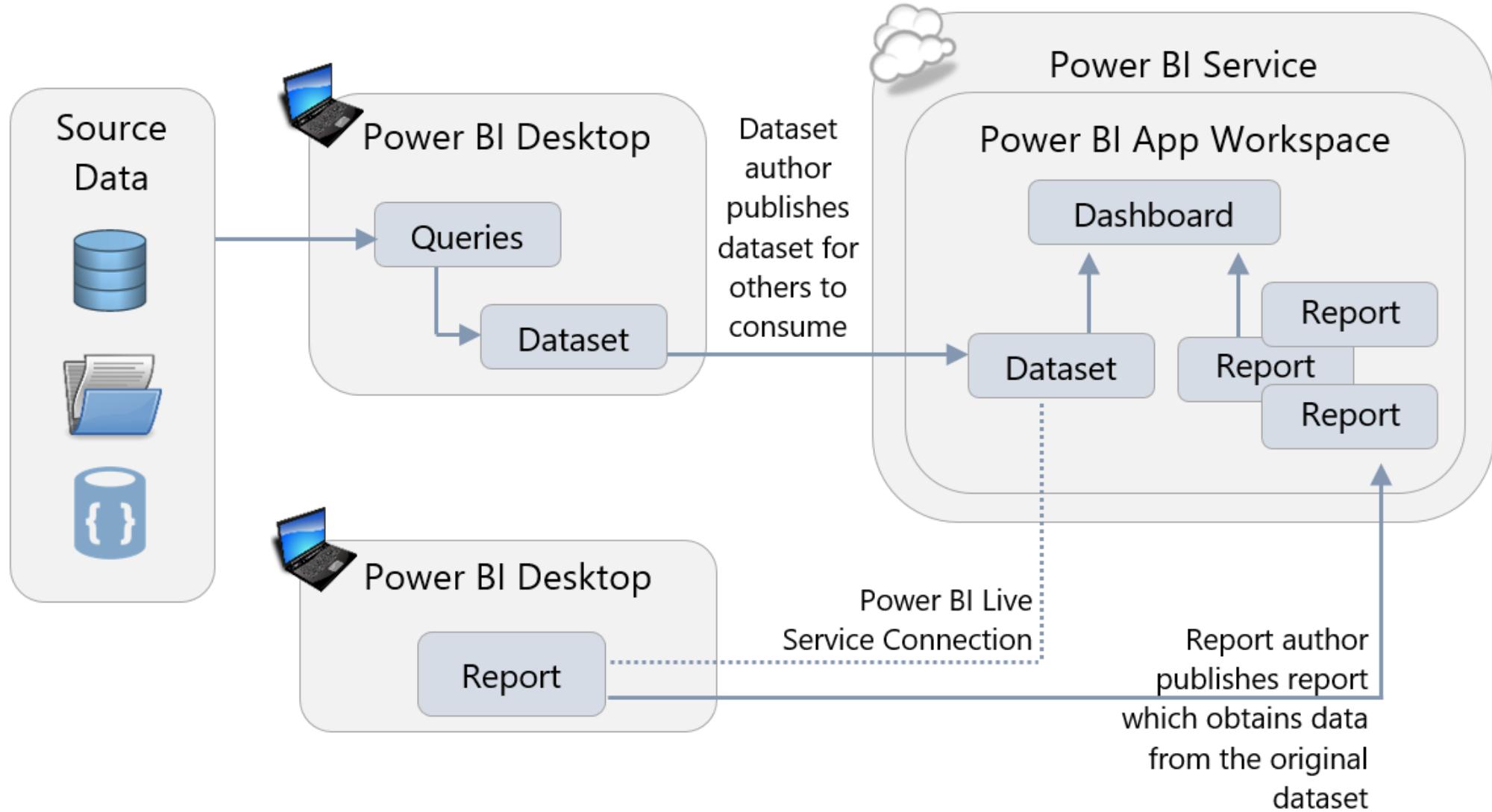
- Monitor performance
- (We should be) Optimising data models

CAPACITY NODE	CORES	BACKEND CORES	FRONTEND CORES
P1	8 v-Cores	4 cores, 25 GB RAM	4 cores
P2	16 v-Cores	8 cores, 50 GB RAM	8 cores
P3	32 v-Cores	16 cores, 100 GB RAM	16 cores

# Best Practices

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- 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
- Collaboration
- 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 Power Automate!**)
- App workspace creation and pro license workflow



# Roadmap and a look into the future

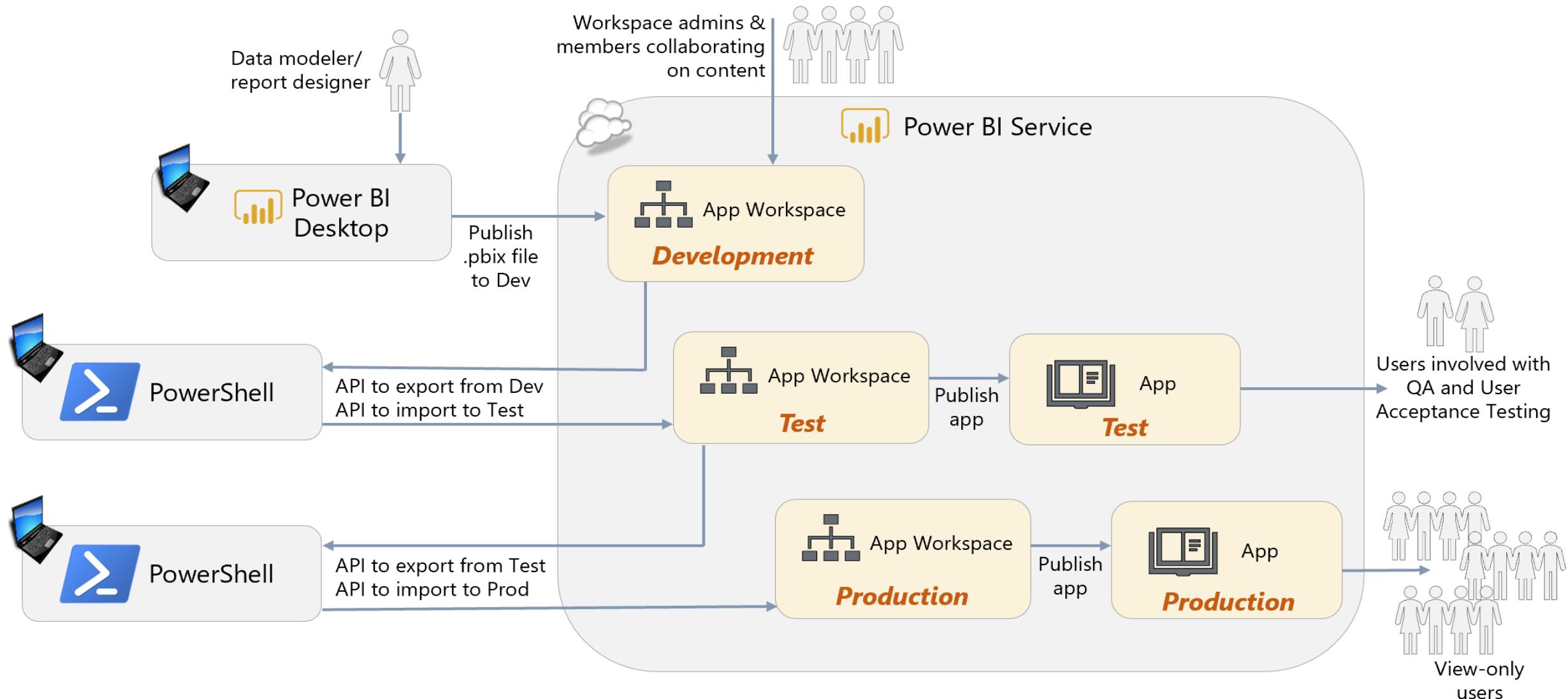
---

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

To do:

- **New workspace** migration (in preview)
- Long term **logging** (Premium) and **monitor** usage
- Power Platform governance & administration
- Development Pipeline / Continuous Delivery

# Roadmap – development pipeline



# Power BI (Premium) resources

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- [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 to our local Partners



# Evaluations

The screenshot shows a session page from the SQLSaturday Belgium 2020 website. At the top, there's a navigation bar with the SQLSaturday logo, the text "BEGALIUM | 07 MAR 2020", and three buttons: "Sessions ^", "Speakers", and "Sponsors ▾". Below the navigation, the session title is "Tips & Tricks of a Power BI Implementation at a Financial Institute". Underneath the title, the speaker is listed as "Speaker: Nicky van Vroenhoven", the duration as "Duration: 60 minutes", the level as "Level: Intermediate", and the track as "Track: Analytics". A large green button at the bottom left says "EVALUATE SESSION".

This screenshot shows the same website but with a focus on the "Sessions" dropdown menu. The "Session Evaluation" option is highlighted with a blue background and white text. The rest of the page content is dimmed.



# Thank you and let's connect!

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