

#DataWeekender

# Tips & Tricks of a Power BI Premium Implementation

## in a Financial Institute

Nicky van Vroenhoven

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



#DataWeekender

# Tips & Tricks of a Power BI Premium Implementation

## in a Financial Institute

Nicky van Vroenhoven

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



2nd May 2020 - Online  
A Virtual Popup Microsoft Data  
Conference



Run by Volunteers  
Zero Budget  
Free to Attend  
Realtime

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

The core people involved are;

[Kevin Chant](#)

[Gethyn Ellis](#)

[Ásgeir Gunnarsson](#)

[Mark Hayes](#)

[Damir Matešić](#)

[Magnus Ahlkvist](#)

# Nicky van Vroenhoven

Lead Expert Data management

Van Lanschot Kempen



@NickyvV



nickyvv.com



Power BI Super User

[community.powerbi.com](https://community.powerbi.com)



Power BI Days Dutch chapter

co-founder [powerbidays.com](http://powerbidays.com)

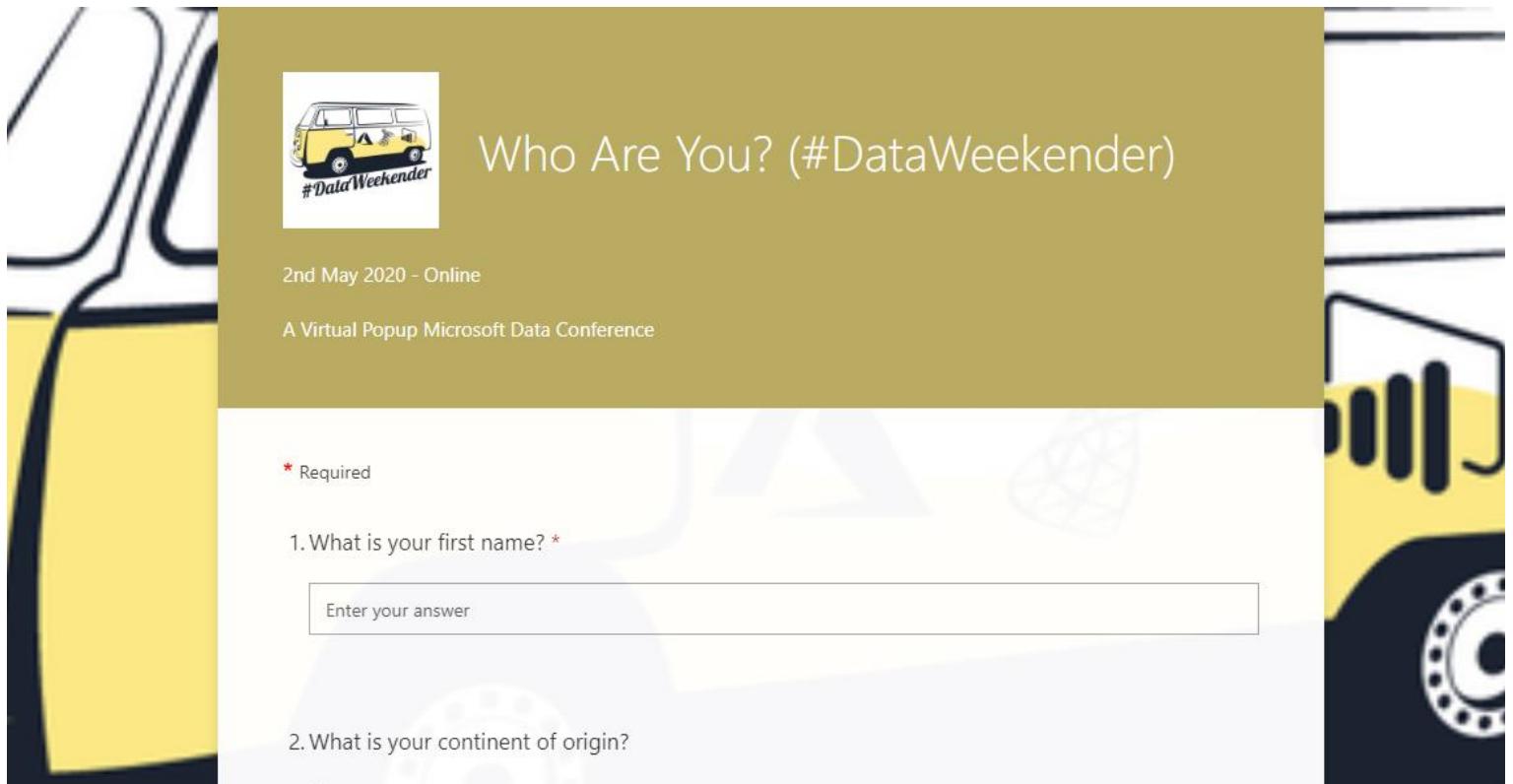


Who are you? <http://bit.ly/dataweekender>

# Who Are You?

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[http://bit.ly/  
dataweekender](http://bit.ly/dataweekender)



Check out my blog for a how-to:  
[www.nickyvv.com/2019/12](http://www.nickyvv.com/2019/12)

# Agenda

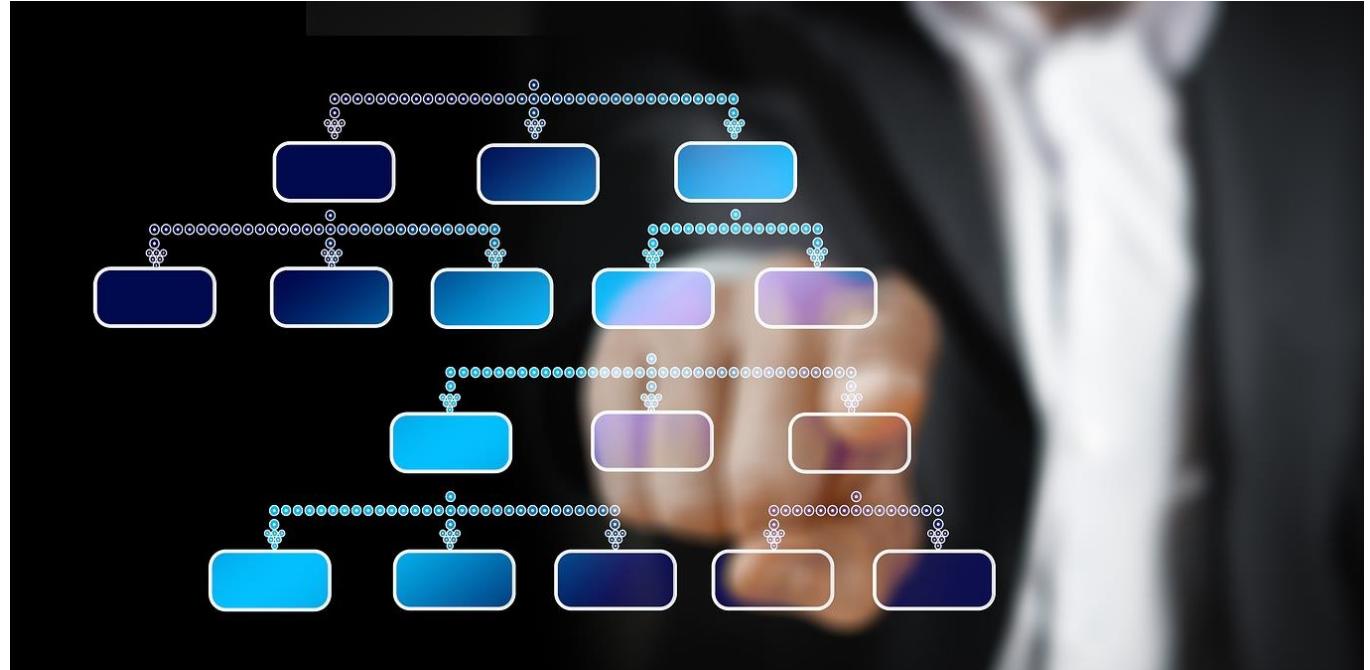
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- Organisation
- Data management
- Reporting
- Collaboration
- Premium / Support
- Lessons learned
- Next steps

# Agenda

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- **Organisation**
- Data management
- Reporting
- Collaboration
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# 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



Everyone deserves Evi



Pronounced personally



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 %

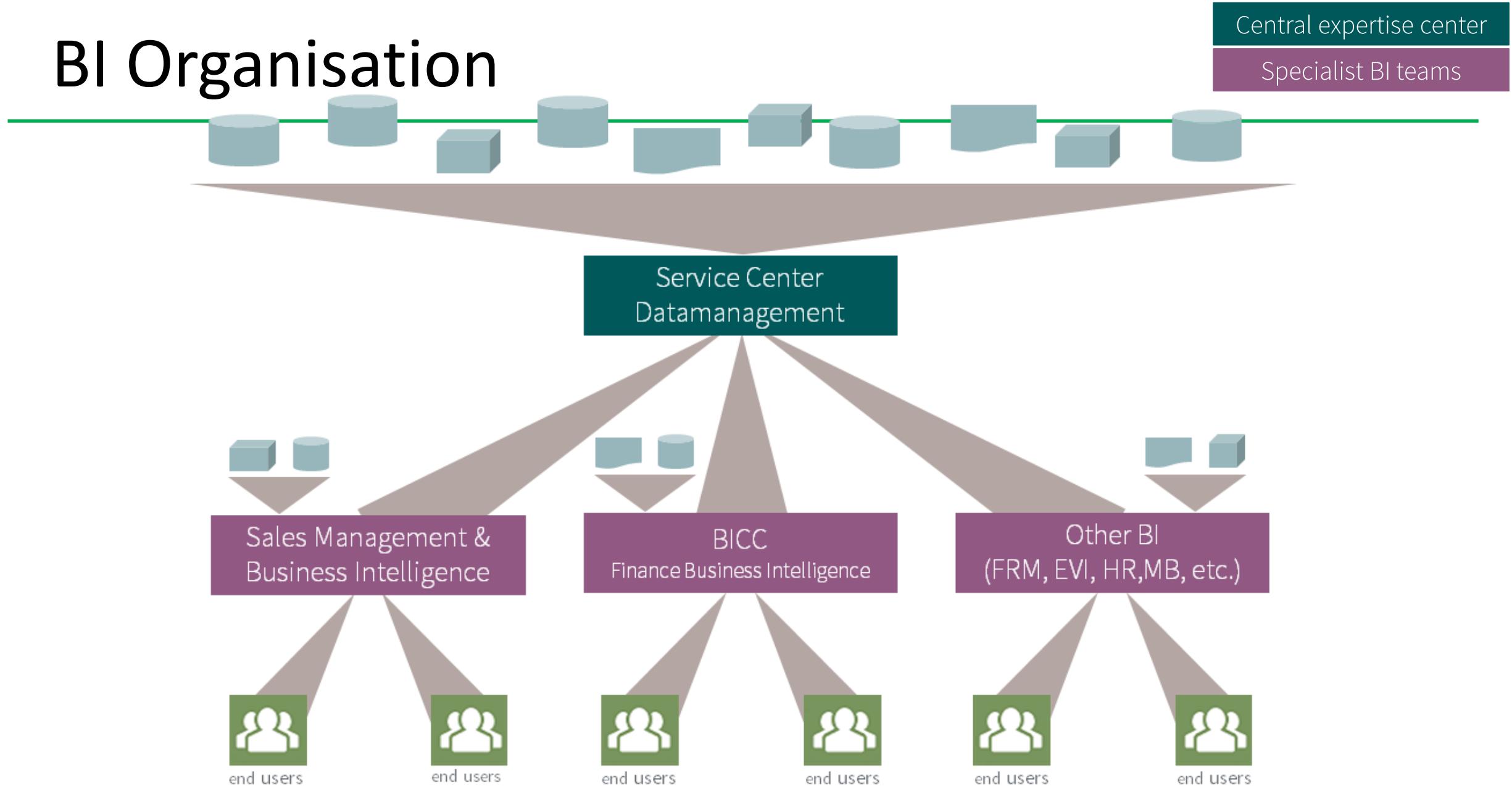
# Agenda

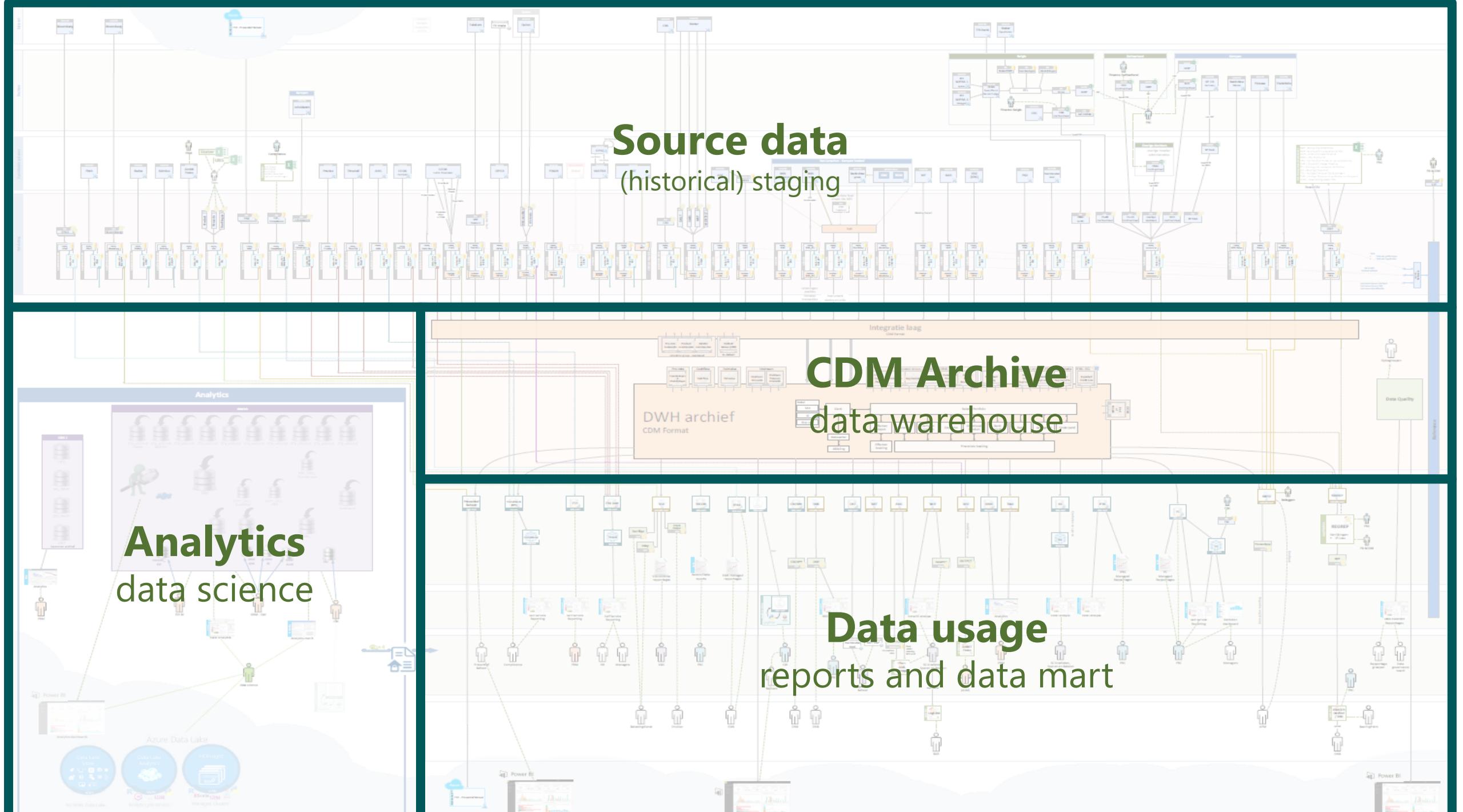
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- Organisation
- **Data management**
- Reporting
- Collaboration
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# BI Organisation





**Source data**  
(historical) staging

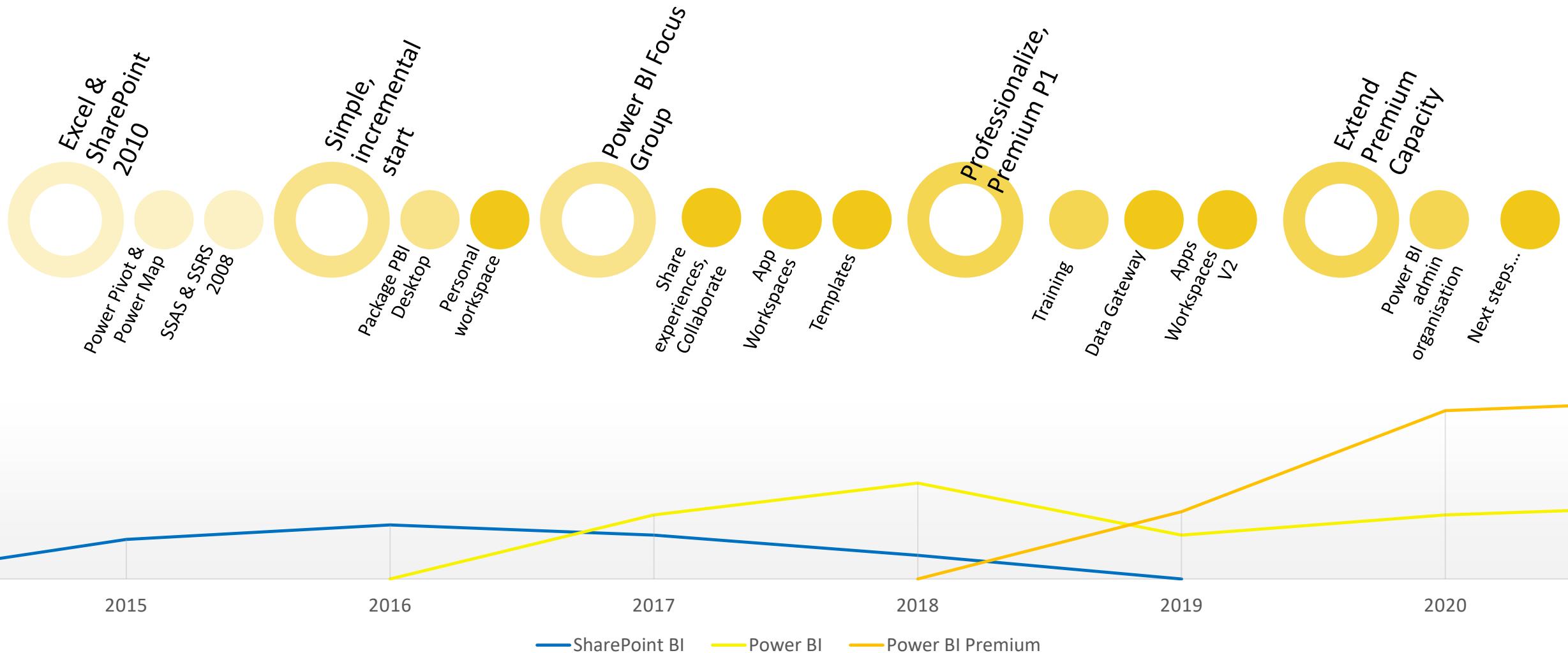
**CDM Archive**  
data warehouse

**Analytics**  
data science

**Data usage**  
reports and data mart

# History and progress

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# 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

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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

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**Trust is key**

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

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**Monitor** to prevent  
proliferation



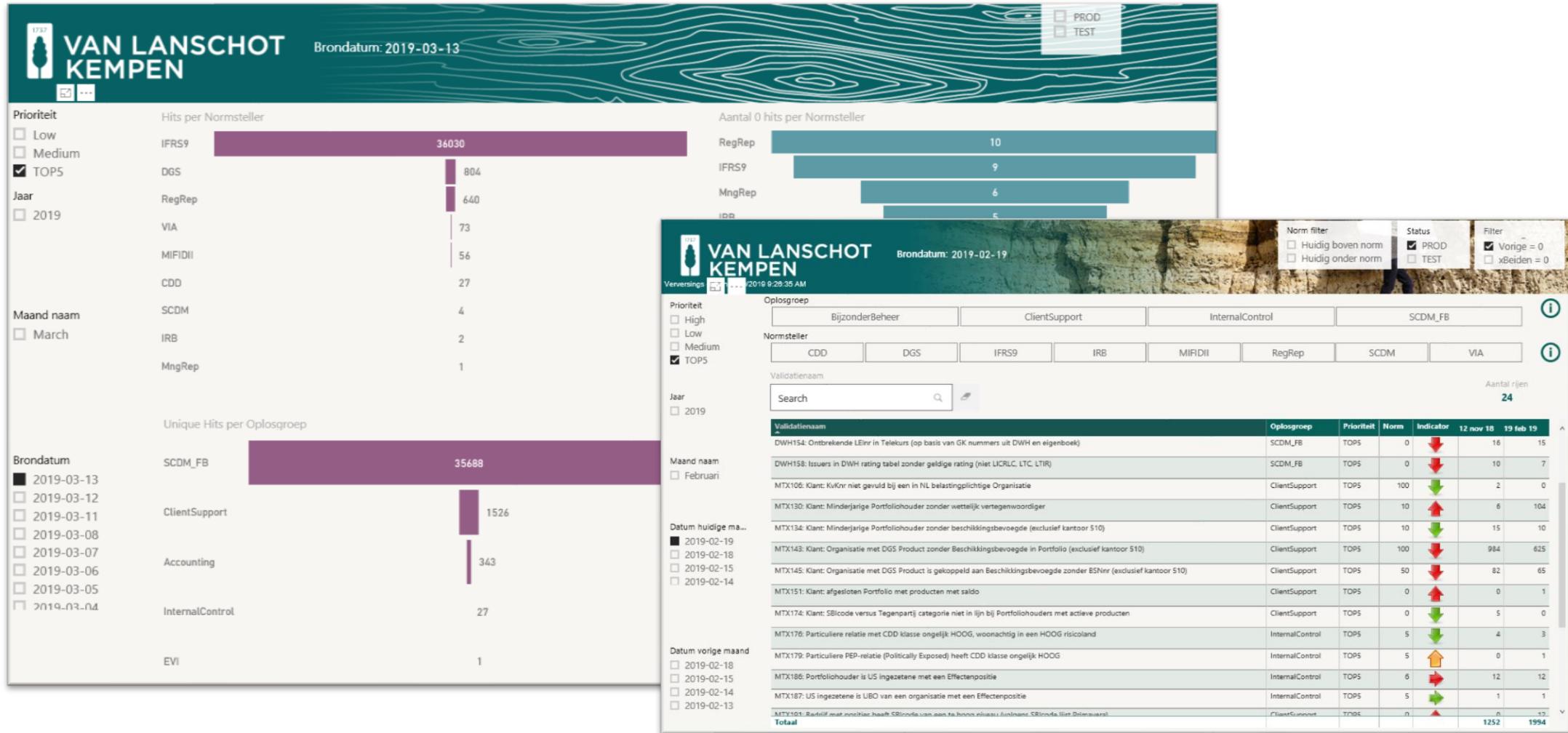
# Agenda

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



# Data Quality Dashboard



# Weekoverzicht suspicious cases

Huidige week

**2018-47**

11/19/2018 11/25/2018

WeekStart

WeekEnd

relatielnr

All ▾

segment

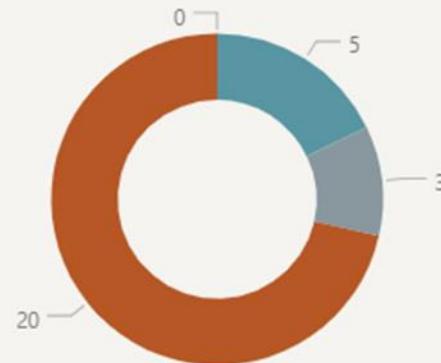
All ▾

weeknr

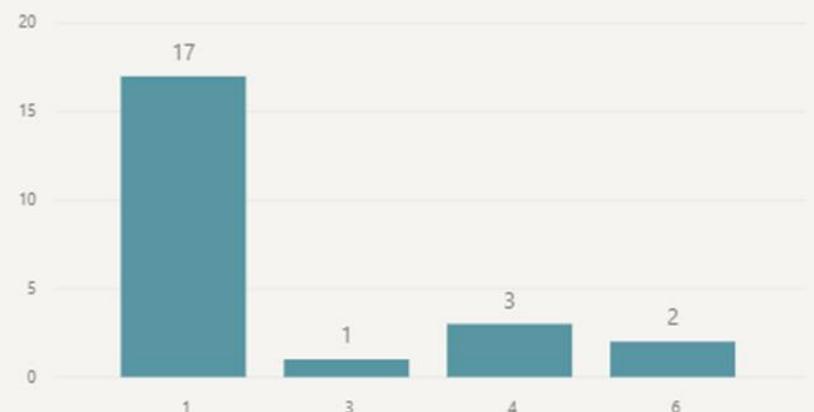
2018-36 ▾

- # 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

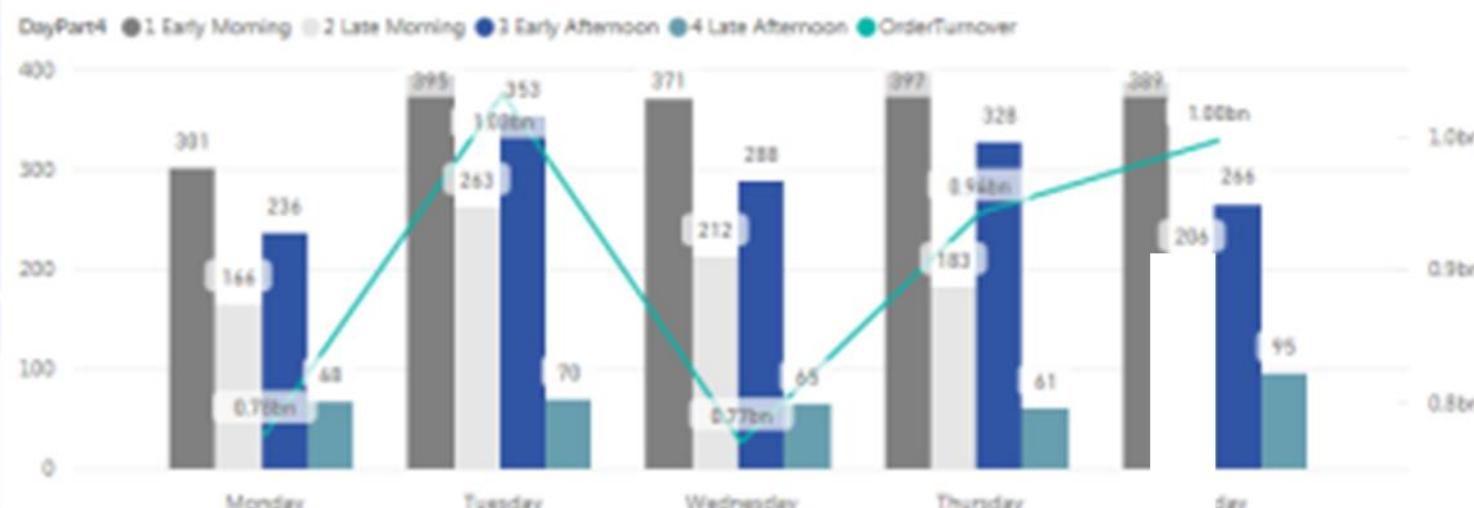
TRADE ANALYZER

Kempen

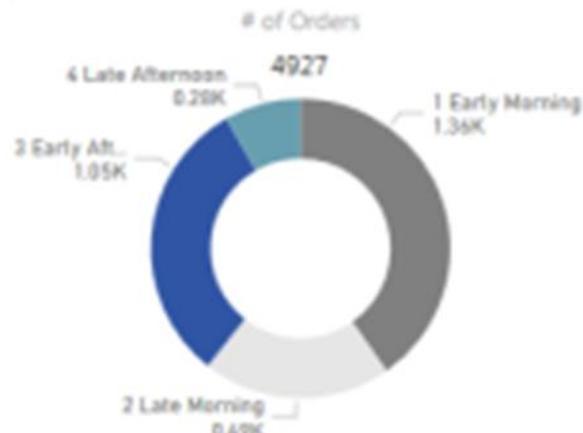
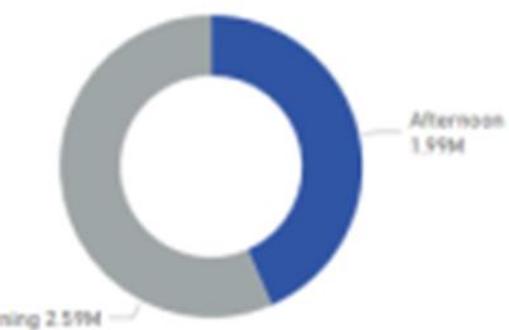
# of Orders by Country Listed



# of Orders per day of the week



Commission Booked

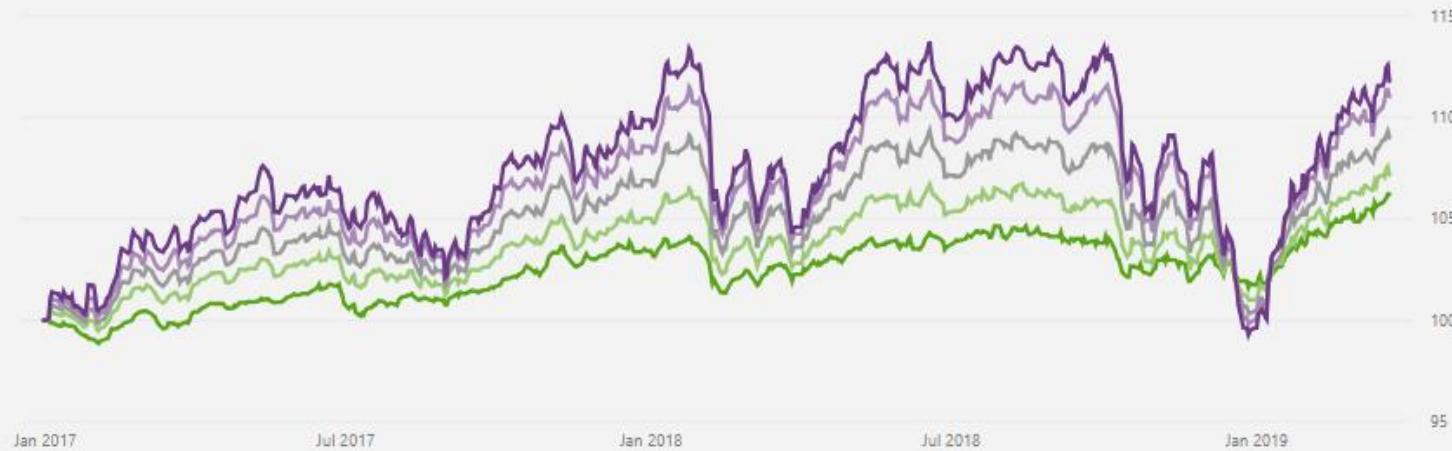


Bing



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%

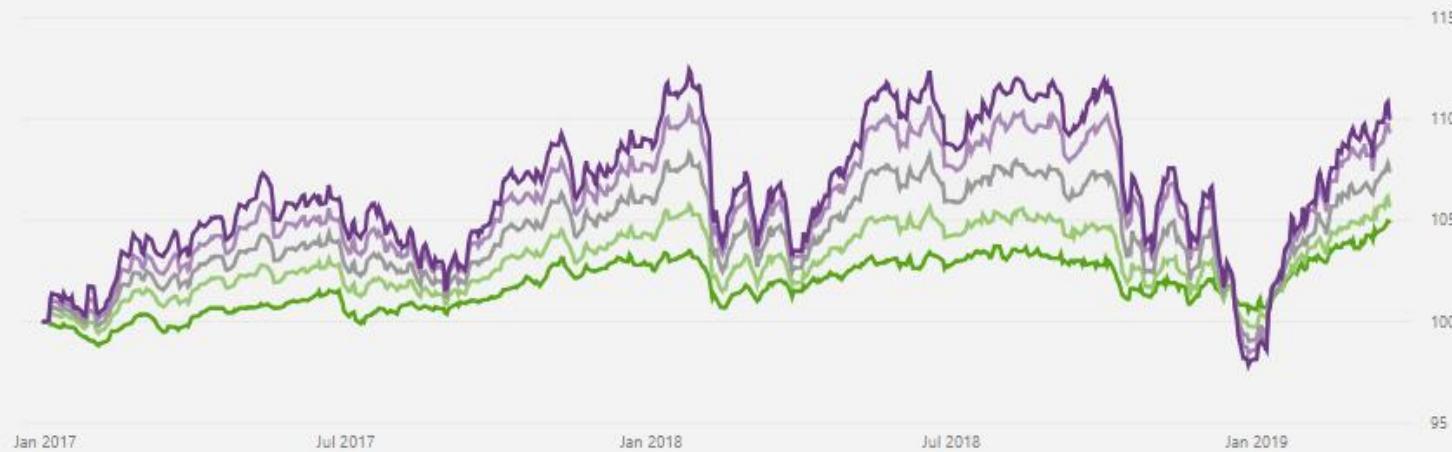
0%

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%

# Agenda

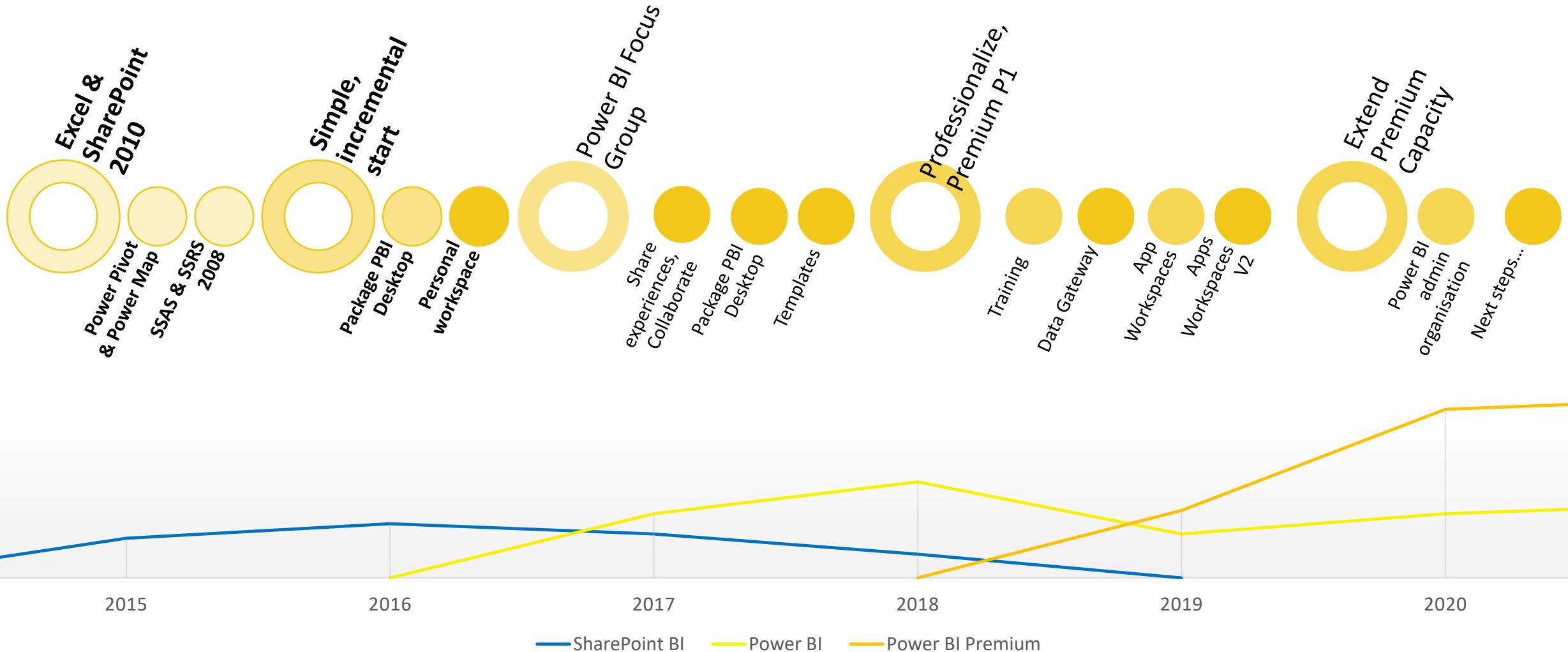
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- Organisation
- Data management
- Reporting
- **Collaboration**
- Premium / Support
- Lessons learned
- Next steps



# History and progress

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# Power BI Workspaces – Don’ts

The screenshot shows the Power BI interface. On the left, there's a navigation bar with 'Export' and 'Share' buttons. A large red 'X' is drawn over the 'Share' button. Below it is a list of items: 'Home', 'Favorites', 'Recent', 'Apps', 'Shared with me', 'Workspaces' (which is highlighted with a yellow oval), and 'My workspace'. The 'Shared with me' item has a small red arrow pointing to the right towards the sharing dialog.

**Share dashboard**  
SQLSATBE

Share Access

Recipients will have the same access as you unless row-level security on the dataset further restricts them. [Learn more](#)

Grant access to

Enter email addresses

Include an optional message...

Allow recipients to share your dashboard

Allow users to build new content using the underlying datasets

Send email notification to recipients

# Power BI at VLK

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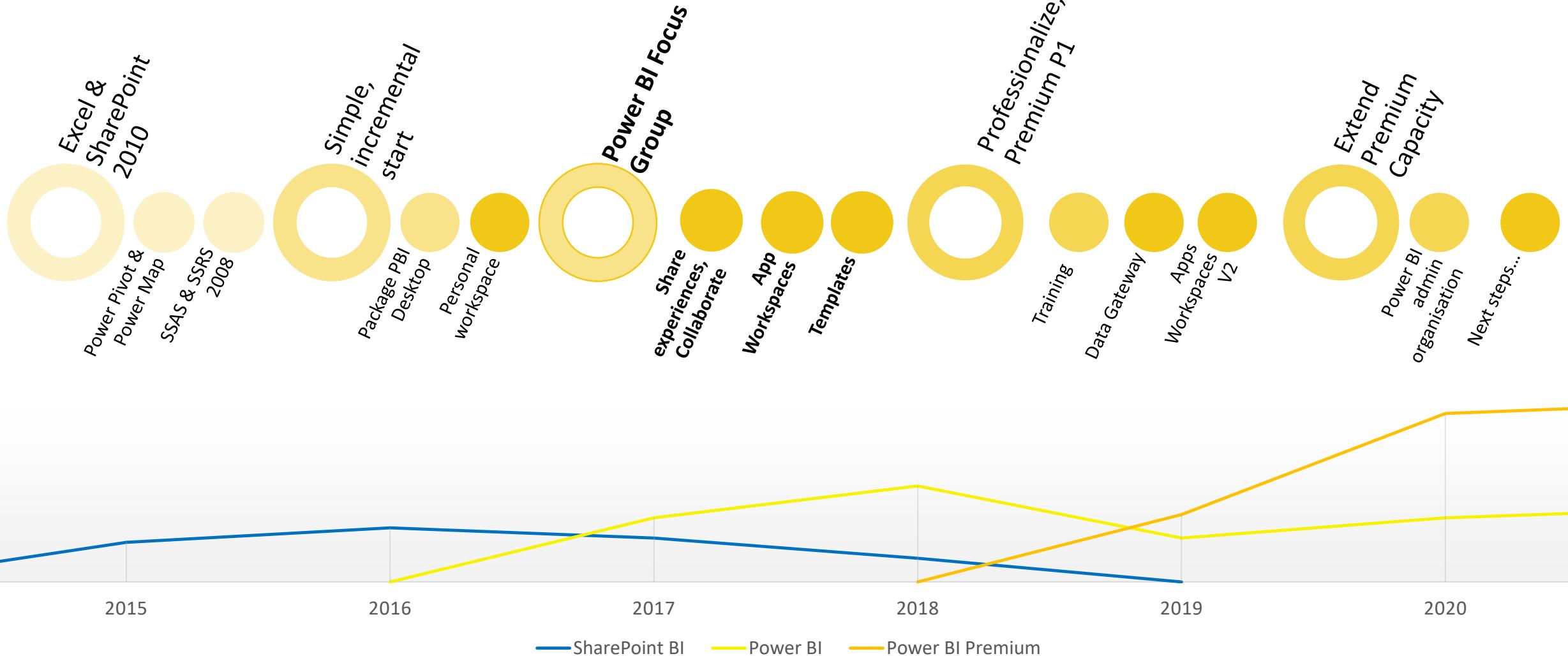
Packaging PBI Desktop monthly



Onedrive for versioning

# History and progress

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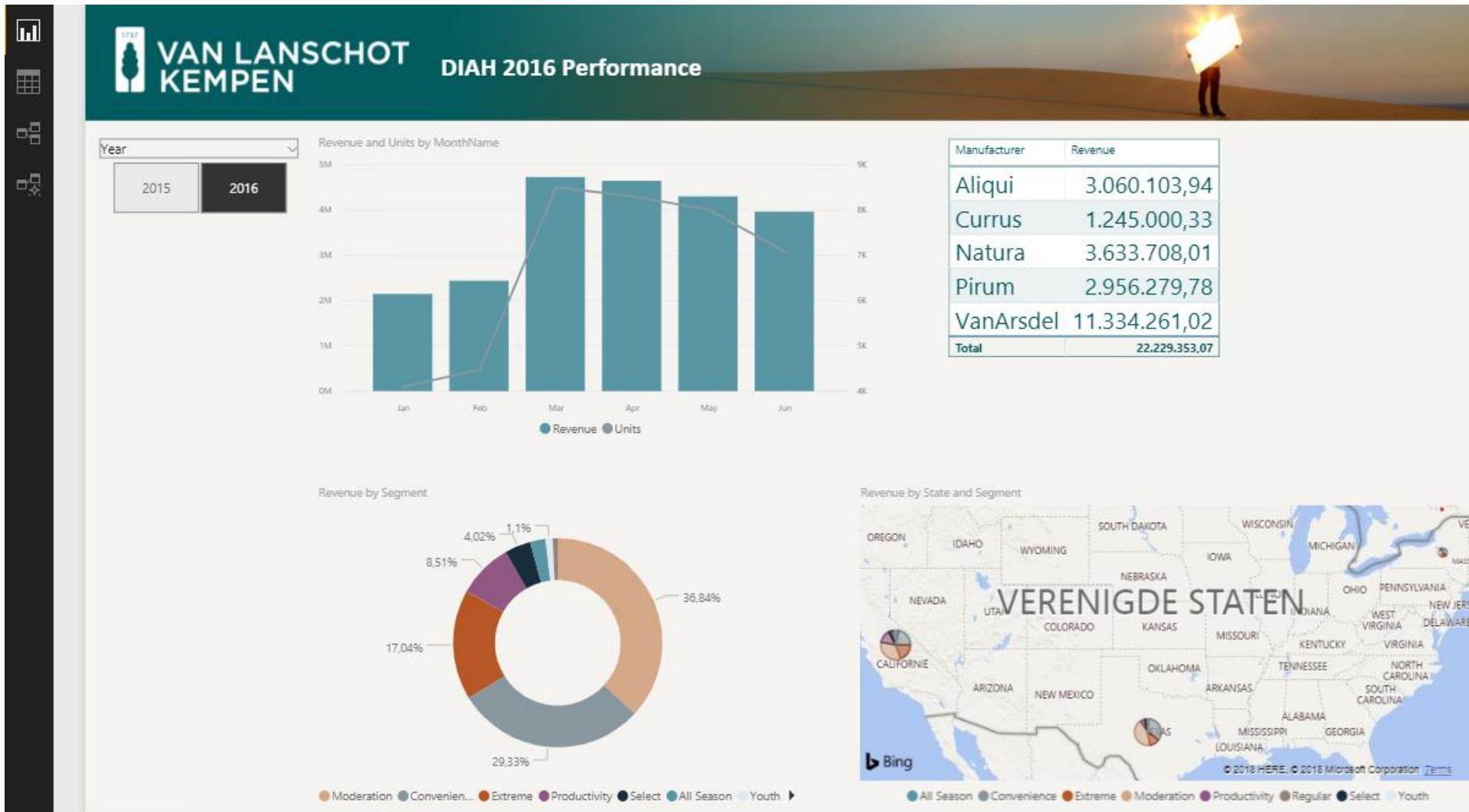


# Power BI at VLK

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- Templates
  - VLK, Kempen, Evi

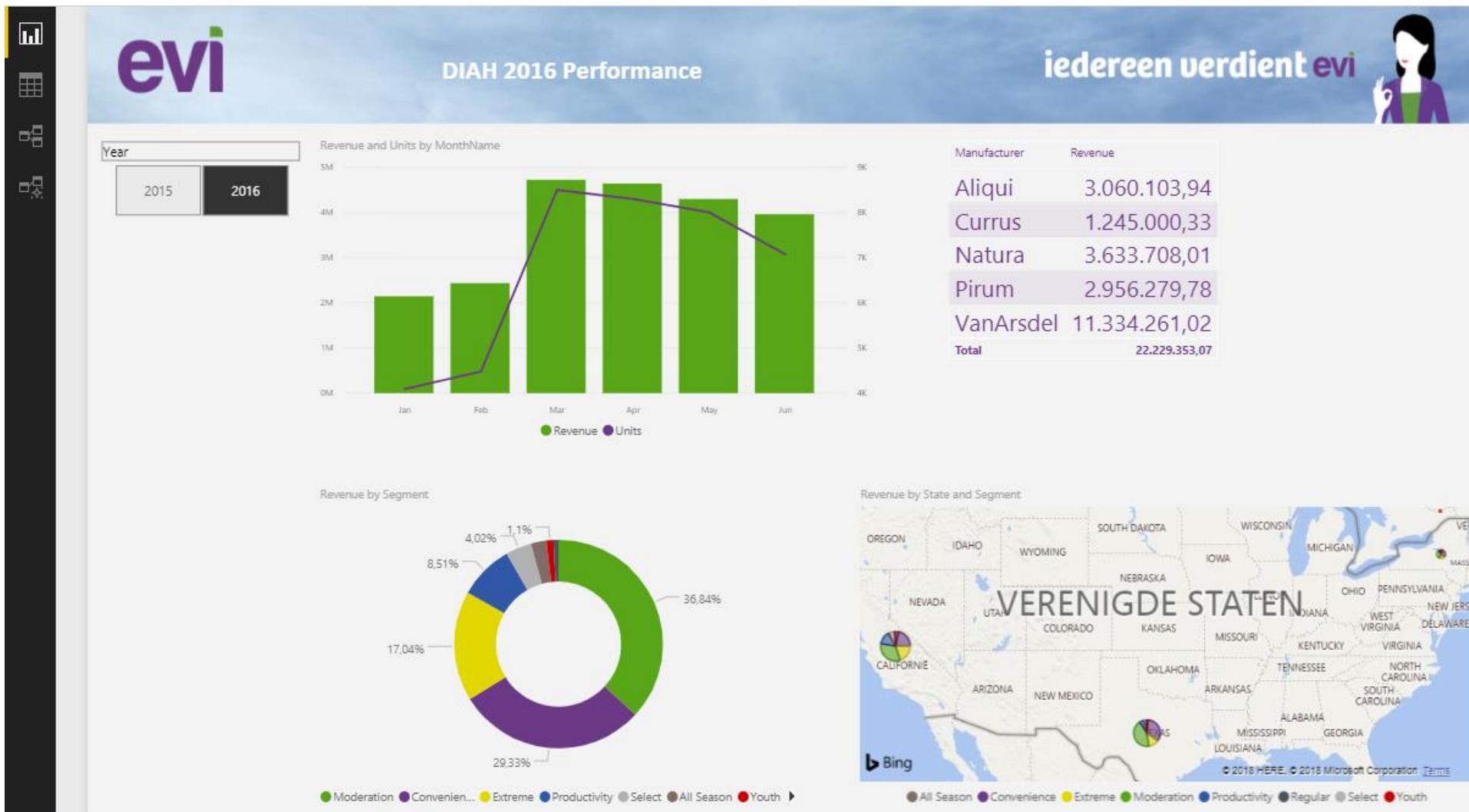
# Power BI at VLK



# Power BI at VLK



# Power BI at VLK



# Power BI at VLK

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- Templates
  - VLK, VL, Kempen, Evi
- Custom Branding in the service

# Custom branding in PowerBI.com

Admin portal

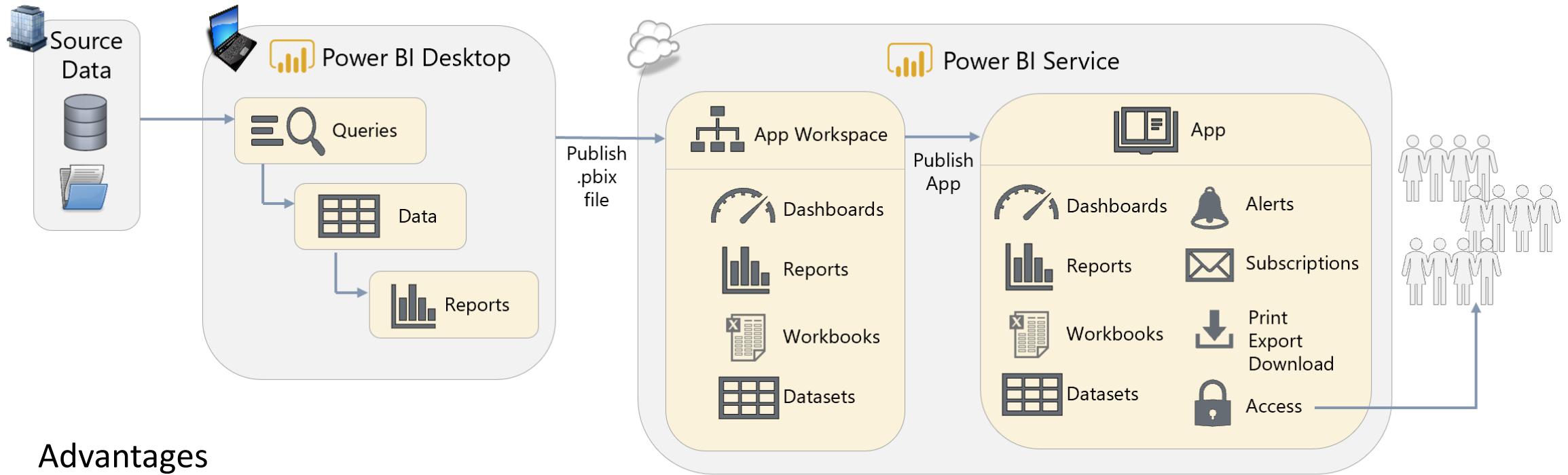
The screenshot shows the Power BI Admin portal interface. On the left, a sidebar lists various administrative options: Usage metrics, Users, Audit logs, Tenant settings, Capacity settings, Embed Codes, Organizational visuals, Dataflow settings, Workspaces, and Custom branding. The 'Custom branding' option 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 for a user profile picture and upload/delete buttons. The 'Cover image' section has a placeholder for a cover image and similar upload/delete buttons. The 'Theme color' section shows a color swatch with the hex code #323130. Below this, a red box highlights the top navigation bar, which features the 'VAN LANSCHOT KEMPEN' logo, a search bar, and a bell icon. A red box also highlights the bottom navigation bar, which includes icons for dashboard, reports, and activity, along with a 'Good afternoon, Nicky' greeting and a search bar.

# Power BI at VLK

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- Templates
  - VLK, VL, Kempen, Evi
- Custom Branding in the service
- Workspaces and Apps

# Power BI Workspaces and Apps



## Advantages

- **Workspace = staging**
- **App = prod**
- **Clear for end users**
- **No Pro license with Premium**

Ongoing changes will be made in the App Workspace area by an author, then published to an App when finalized.

Content is consumed (read-only) in the App by the user population

# Agenda

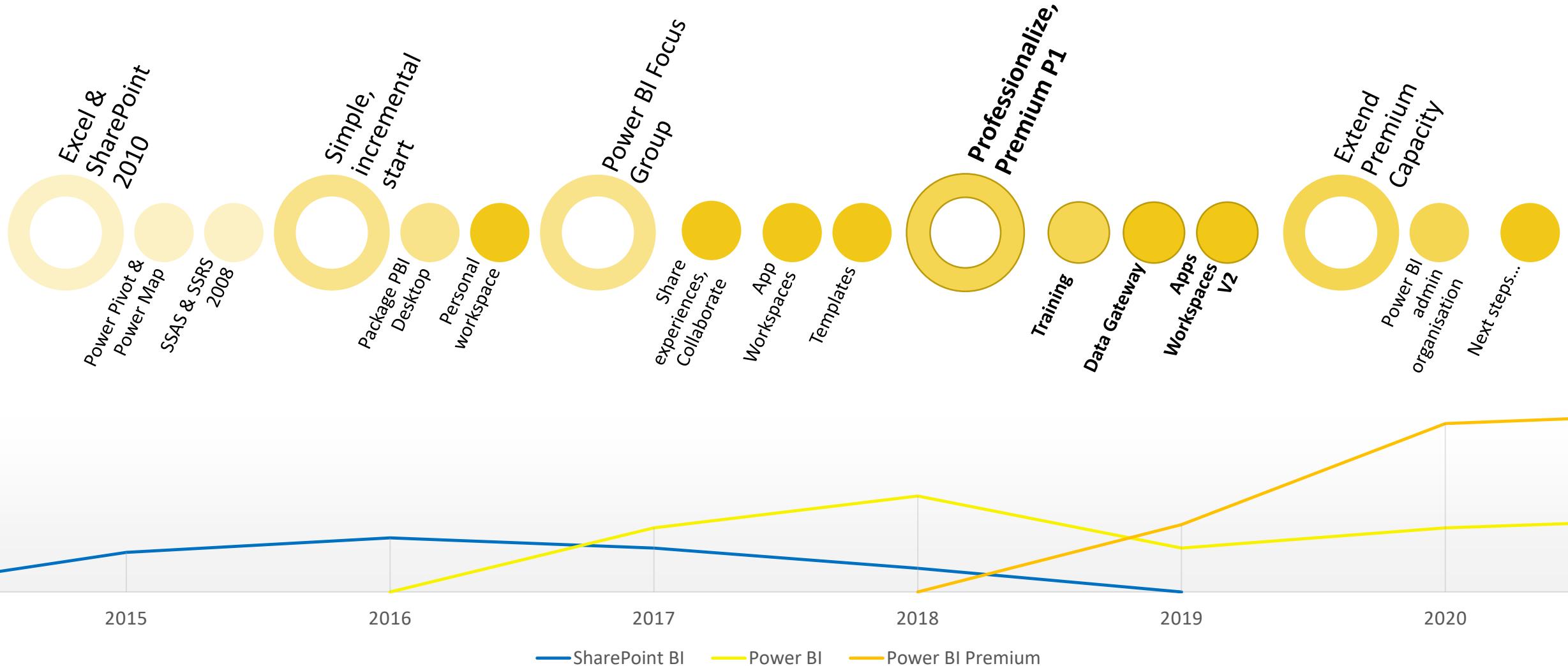
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- Organisation
- Data management
- Reporting
- Collaboration
- **Premium / Support**
- Lessons learned
- Next steps

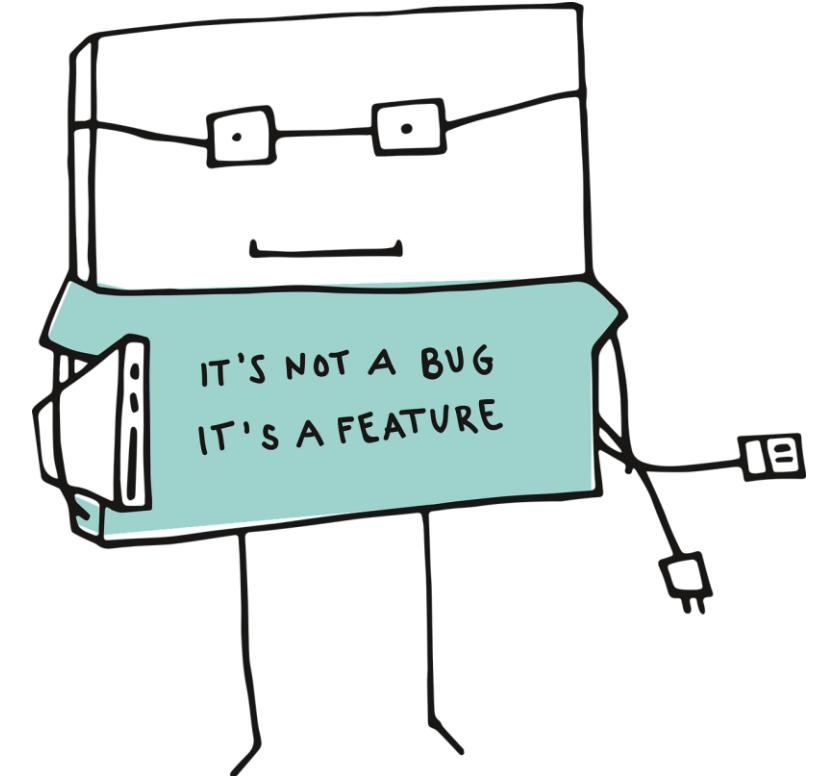


# History and progress

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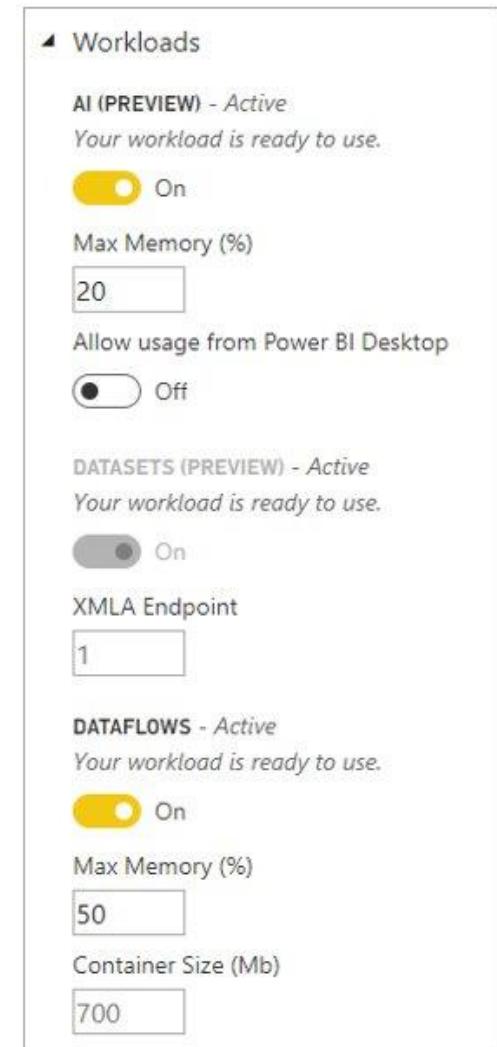


# Power BI Premium



# Power BI Premium features

- ▶ Licensing option
  - Unlimited consumers, both internal and external users
- ▶ Capacity based features
  - Dedicated hardware
  - Paginated reports (SSRS)
  - Big datasets
  - 48 refreshes per day
  - AI-powered data modeling using AutoML and Cognitive Services
  - Linked and Computed Entities in Dataflows
  - Export REST API
- ▶ Enterprise features
  - Multiple region support
  - Power BI Report Server
  - XMLA endpoint
  - Deployment pipelines
  - BYOK, VNET etc.

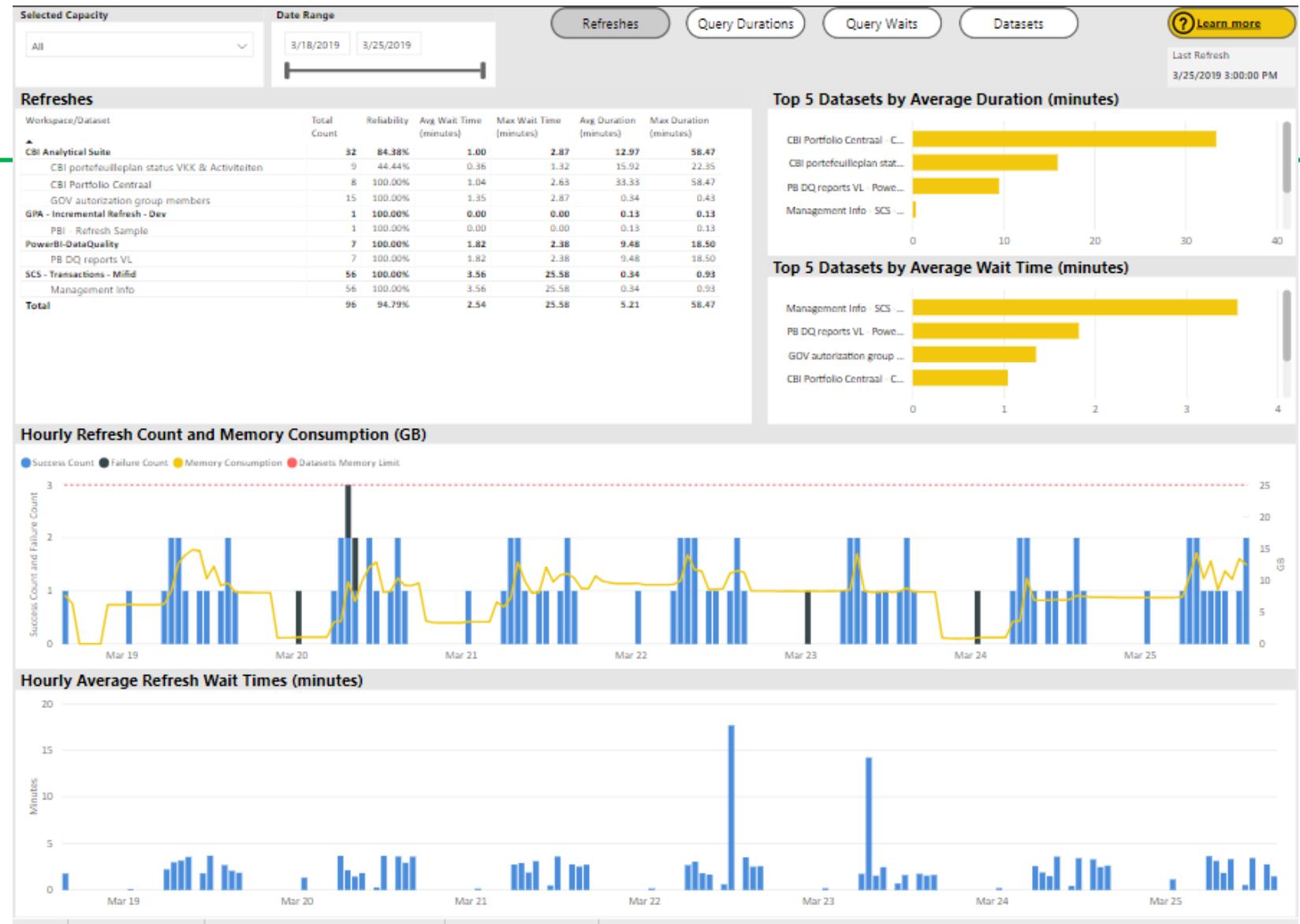


# Premium Capacity Metrics App

The screenshot shows the Microsoft 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 Capa..." app, dated MAR 18, 2019. The card includes a circular icon with a bar chart and diamond, and a smaller box with a grid icon and the text "Get more apps from Microsoft AppSource". A yellow "Get apps" button is located in the top right corner of the main content area.



# Premium Capacity

From 750 to 80 pro licences with Premium P1

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
2019										2020				
										<b>CAPACITY NODE</b>	<b>CORES</b>	<b>BACKEND CORES</b>	<b>FRONTEND CORES</b>	
										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	

# Professionalize Power BI administration

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

# 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



Getting started

Learn

Community

Get help

Power BI for developers

Privacy & cookies

Accessibility shortcuts

About Power BI

can go to internal help and support resources from the Power

[om:f/s/ts-BI/EqbhZW2ovNBGoiqtsKCGwMQBeDJCATlu\\_03B4X](https://powerbi.com/f/s/ts-BI/EqbhZW2ovNBGoiqtsKCGwMQBeDJCATlu_03B4X)

[om/Sites/ts-BI/Lists/Power%20BI%20Forum/AllItems.aspx](https://powerbi.com/Sites/ts-BI/Lists/Power%20BI%20Forum/AllItems.aspx)

[ern.nl/tas/public/ssp/content/serviceflow?unid=9f20456baae34](https://ern.nl/tas/public/ssp/content/serviceflow?unid=9f20456baae34)

[ern.nl/tas/public/ssp/content/serviceflow?unid=0ec6987f62654](https://ern.nl/tas/public/ssp/content/serviceflow?unid=0ec6987f62654)

Apply to:

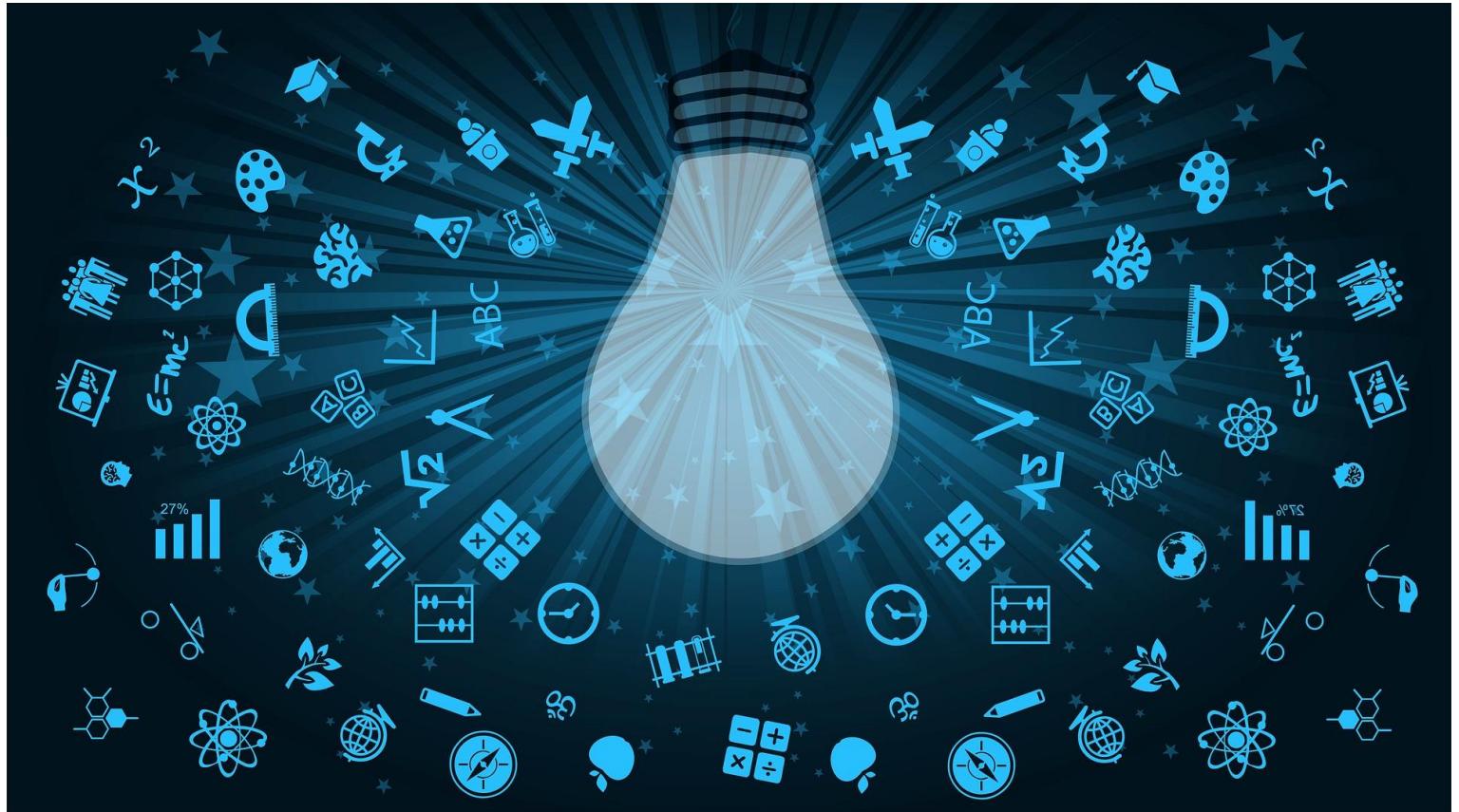
The entire organization

Specific security groups

# Agenda

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



# Knowledge is key

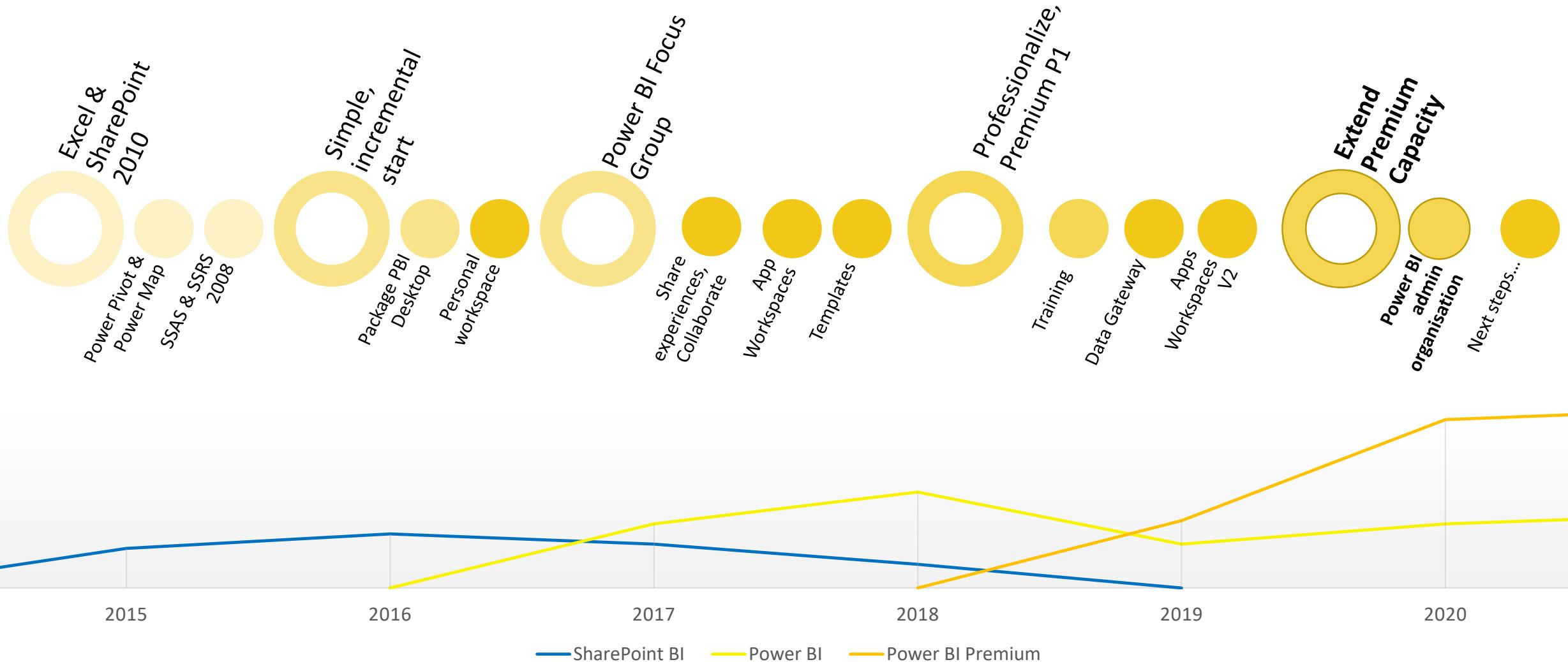
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- Power BI (re)training
- BI Focus Group
  - Start: changing content
  - Now: 2 tracks
    - End users
    - In-depth

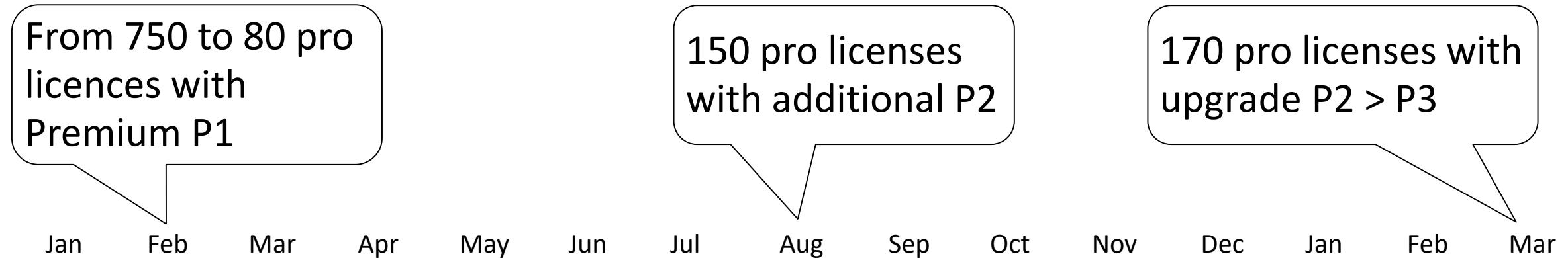


# History and progress

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# Additional Premium Capacity



2019

2020

## Lessons:

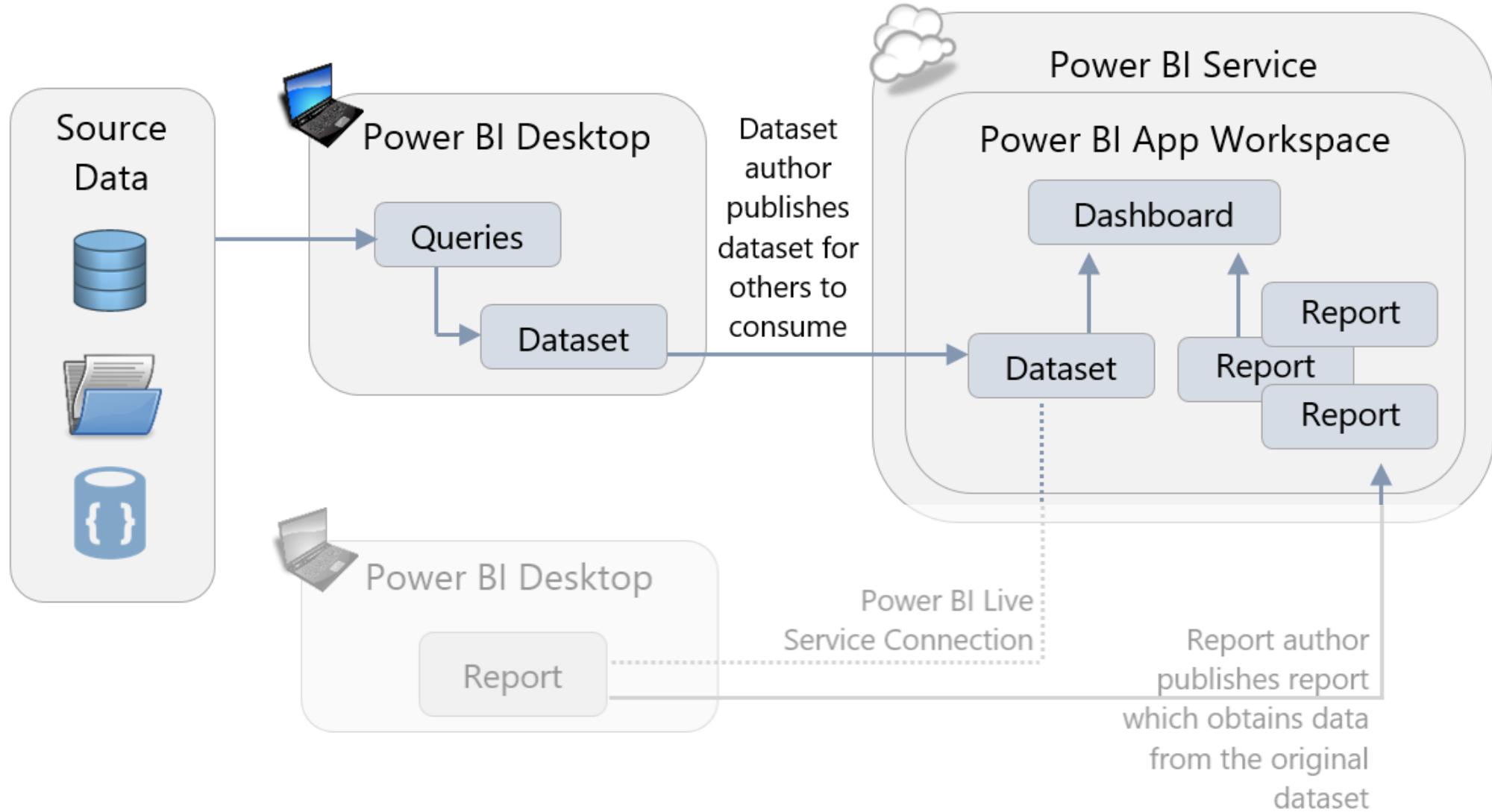
- Monitor performance
- Optimize data models

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

# Lessons Learned

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- ± 40 Best practices Power BI Cheat Sheet: <https://bit.ly/cheatsheetpbi>)
  - 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
- Monitor Premium capacity
- Disconnect the dataset from report development



# Agenda

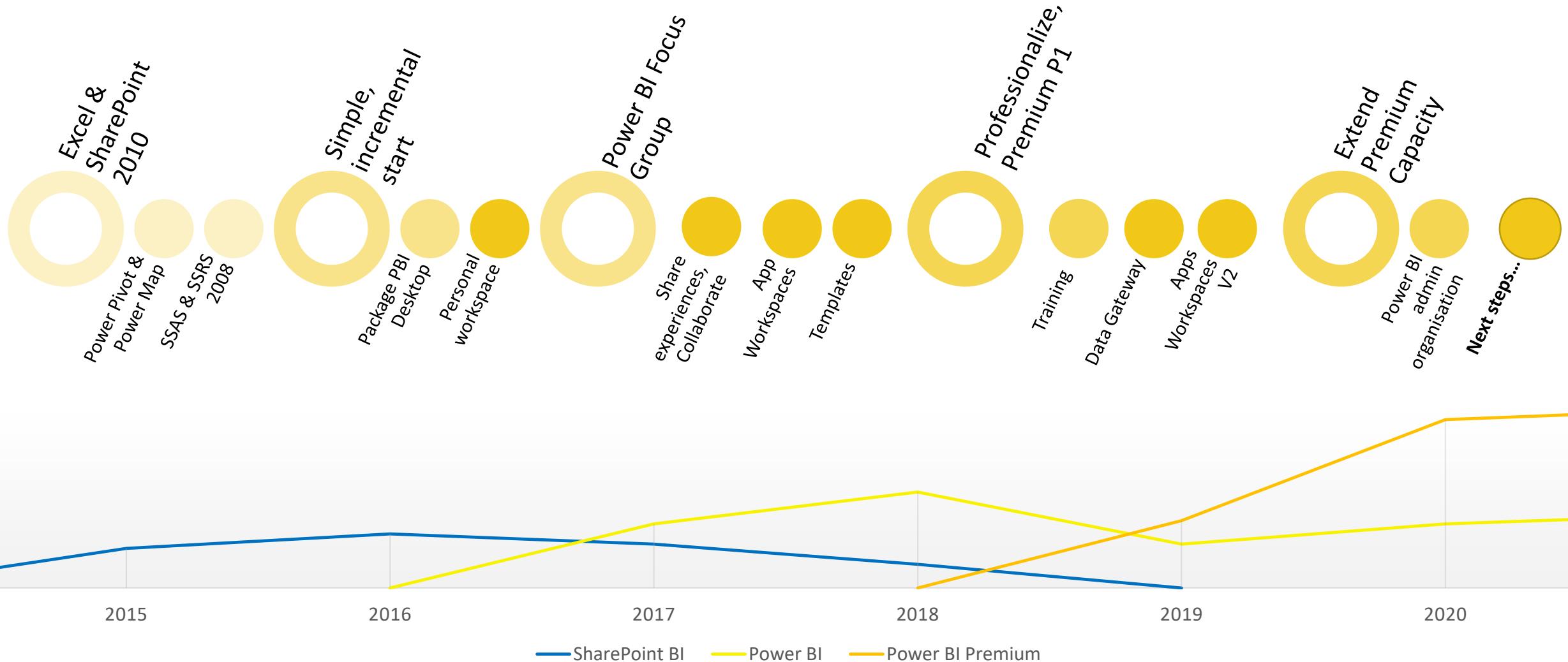
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- Organisation
- Data management
- Reporting
- Collaboration
- Premium / Support
- Lessons learned
- **Next steps**



# History and progress

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# Roadmap and a look into the future

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

Already started:

- Automatic dataset refresh (PowerShell or **Flow Power Automate!**)



# Roadmap and a look into the future

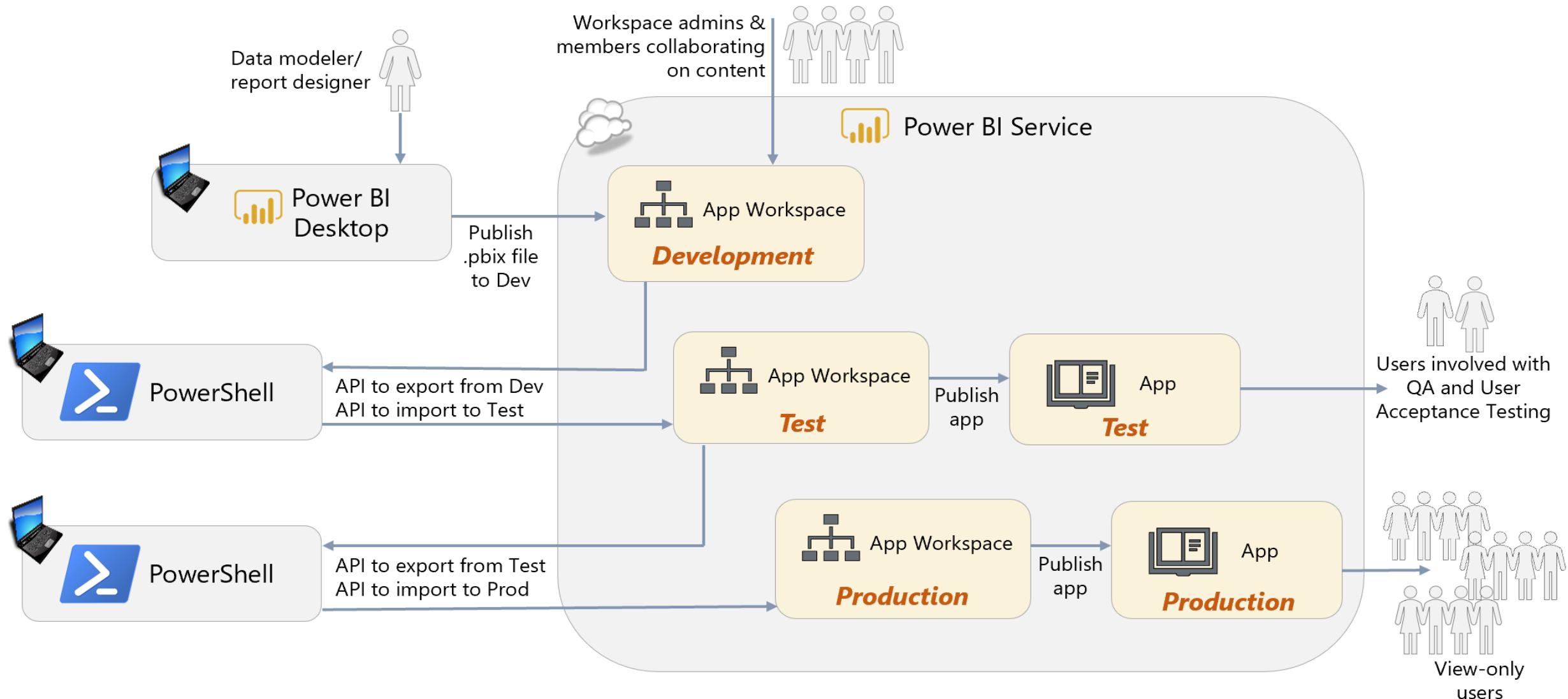
---

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

# Roadmap – development pipeline



# 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~~ Deployment pipelines

# 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 and let's connect!

- [NickyvV.com](http://NickyvV.com)
- [@NickyvV](https://twitter.com/NickyvV)
- [www.linkedin.com/in/nickyvanvroenhoven/](https://www.linkedin.com/in/nickyvanvroenhoven/)

