



WELCOME TO  
**VISSEER &  
VAN BAARS**  
THE BI & BIG DATA NETWORK

LIVE

We will be starting soon..

# Agenda:

**“How to successfully implement Power BI”**

Nicky van Vroenhoven

Lead Expert Data Management at Van Lanschot Kempen

+ Q&A



# 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)



# Agenda

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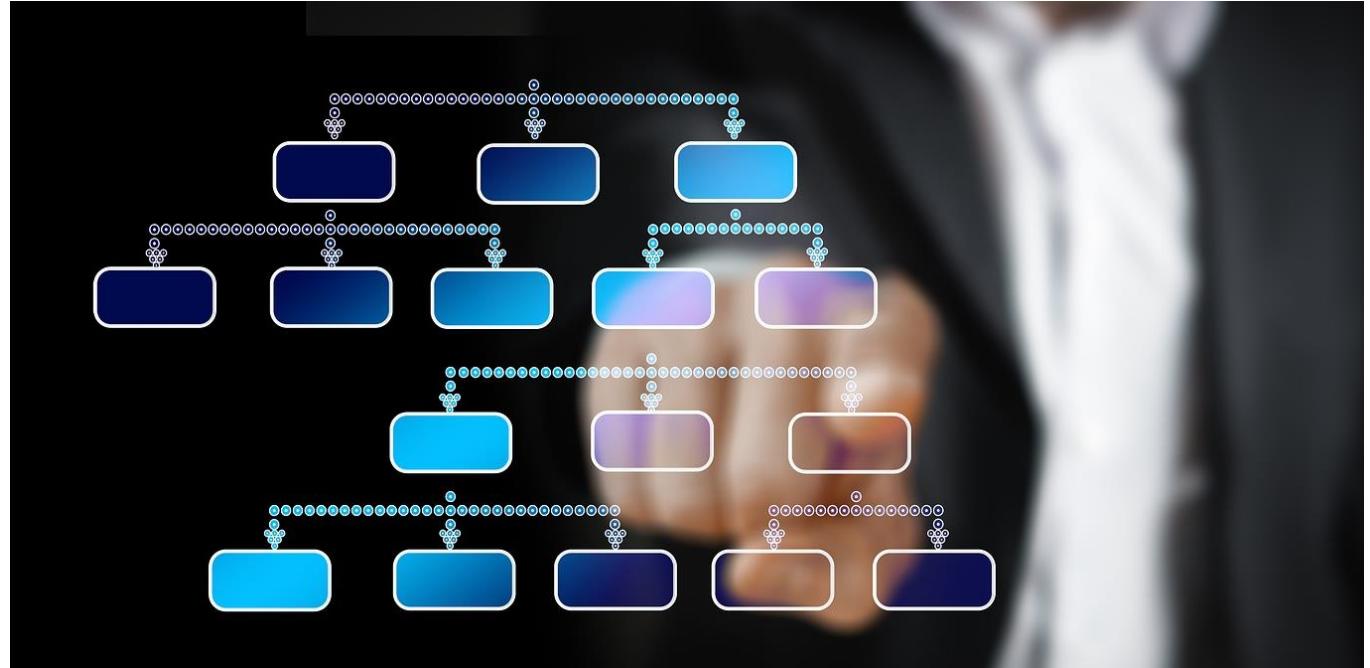
- Organisation
- Data management
- Reporting
- Collaboration
- Premium / Support
- Lessons learned
- Next steps



# Agenda

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- **Organisation**
- Data management
- Reporting
- Collaboration
- Premium / Support
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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.

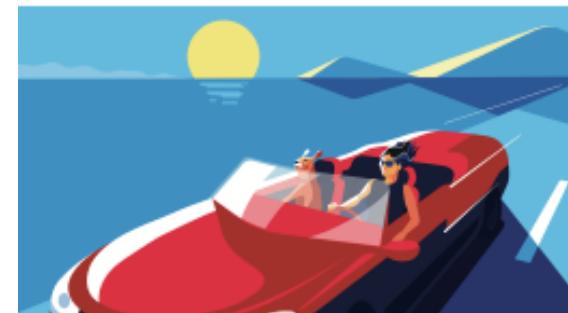
**Mission:** creation and preservation of wealth of our customers



Specialised in the future  
since 1737



Everyone deserves Evi



Pronounced personally



turning dedication into  
dazzling prospects



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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 %



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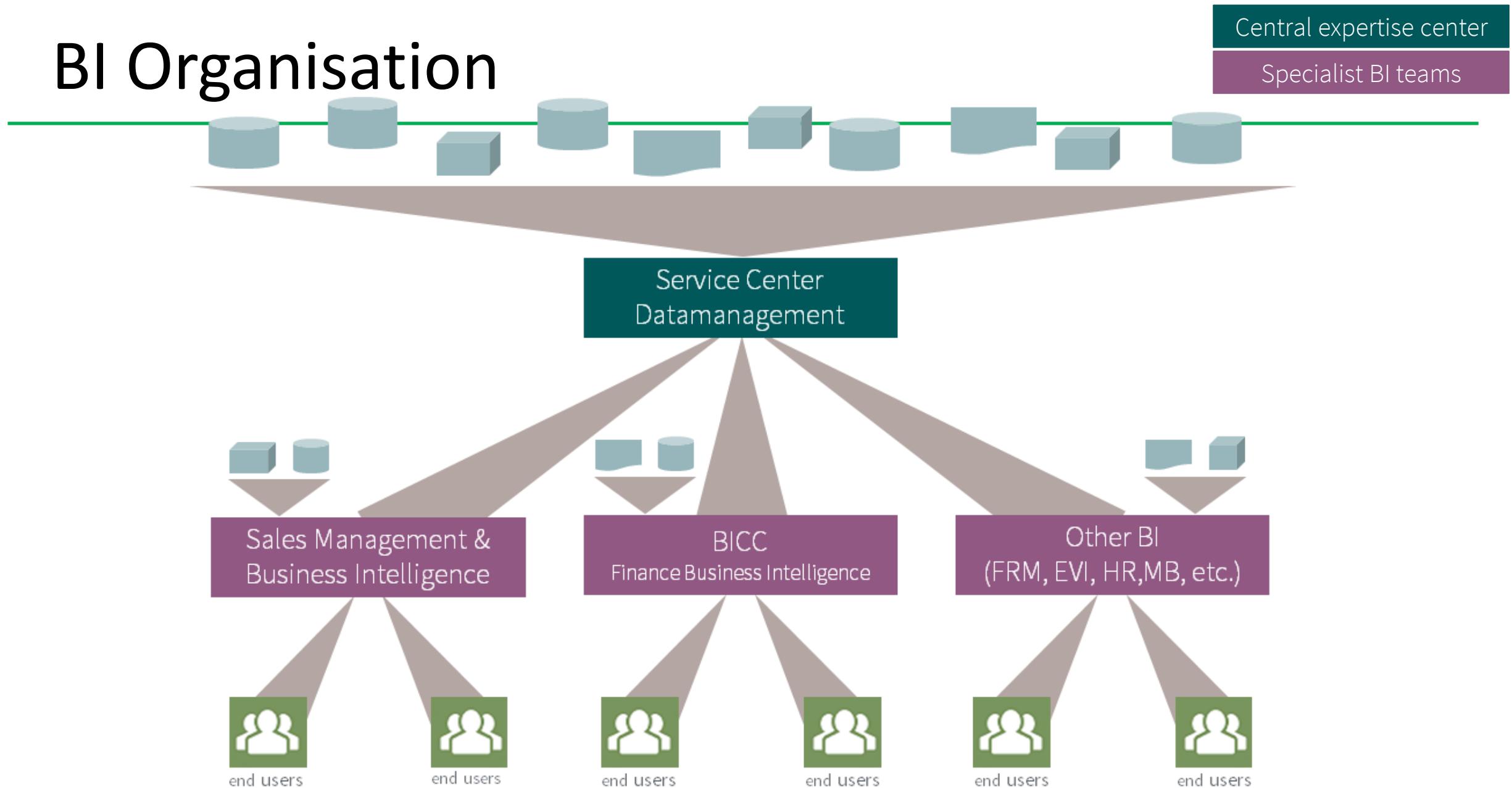
# Agenda

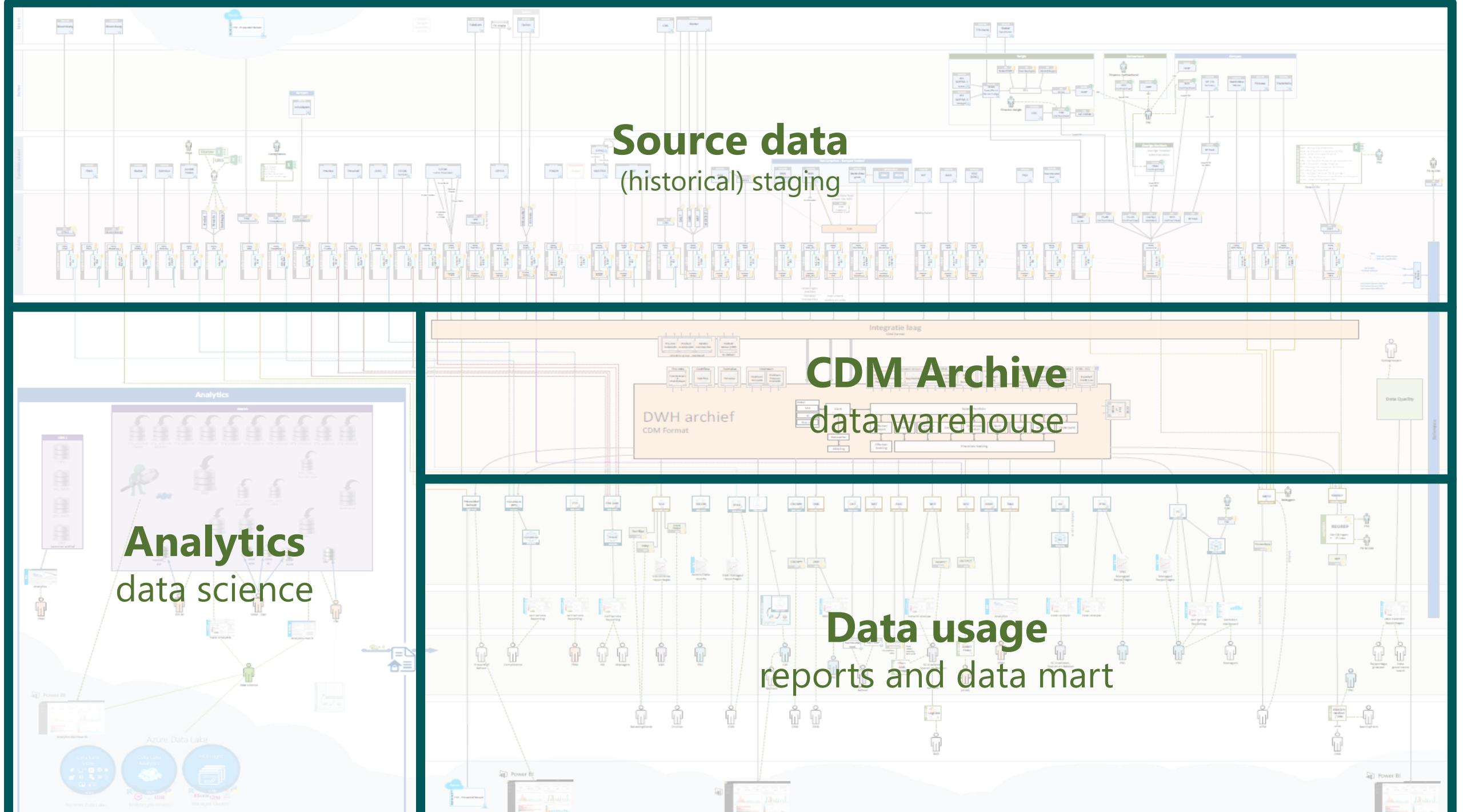
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- Organisation
- **Data management**
- Reporting
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# BI Organisation





## Source data (historical) staging

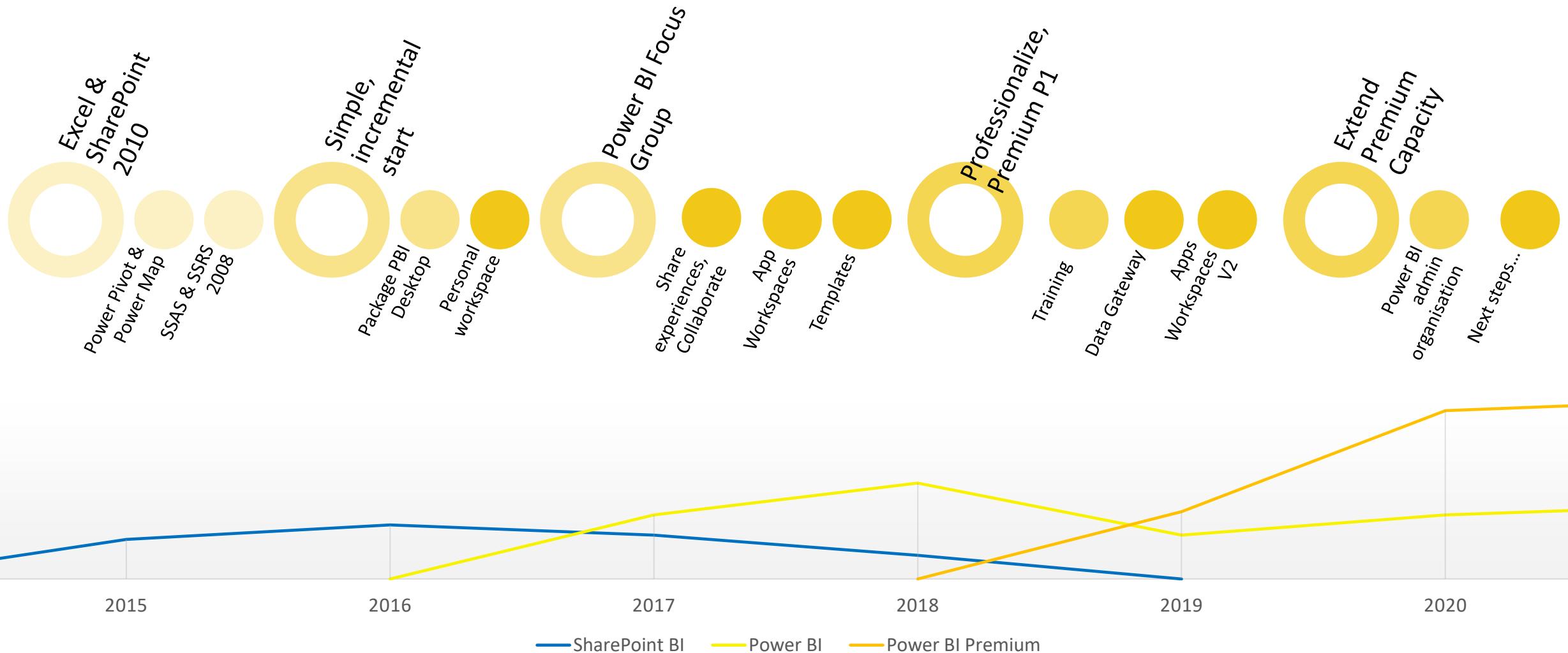
## CDM Archive data warehouse

## 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



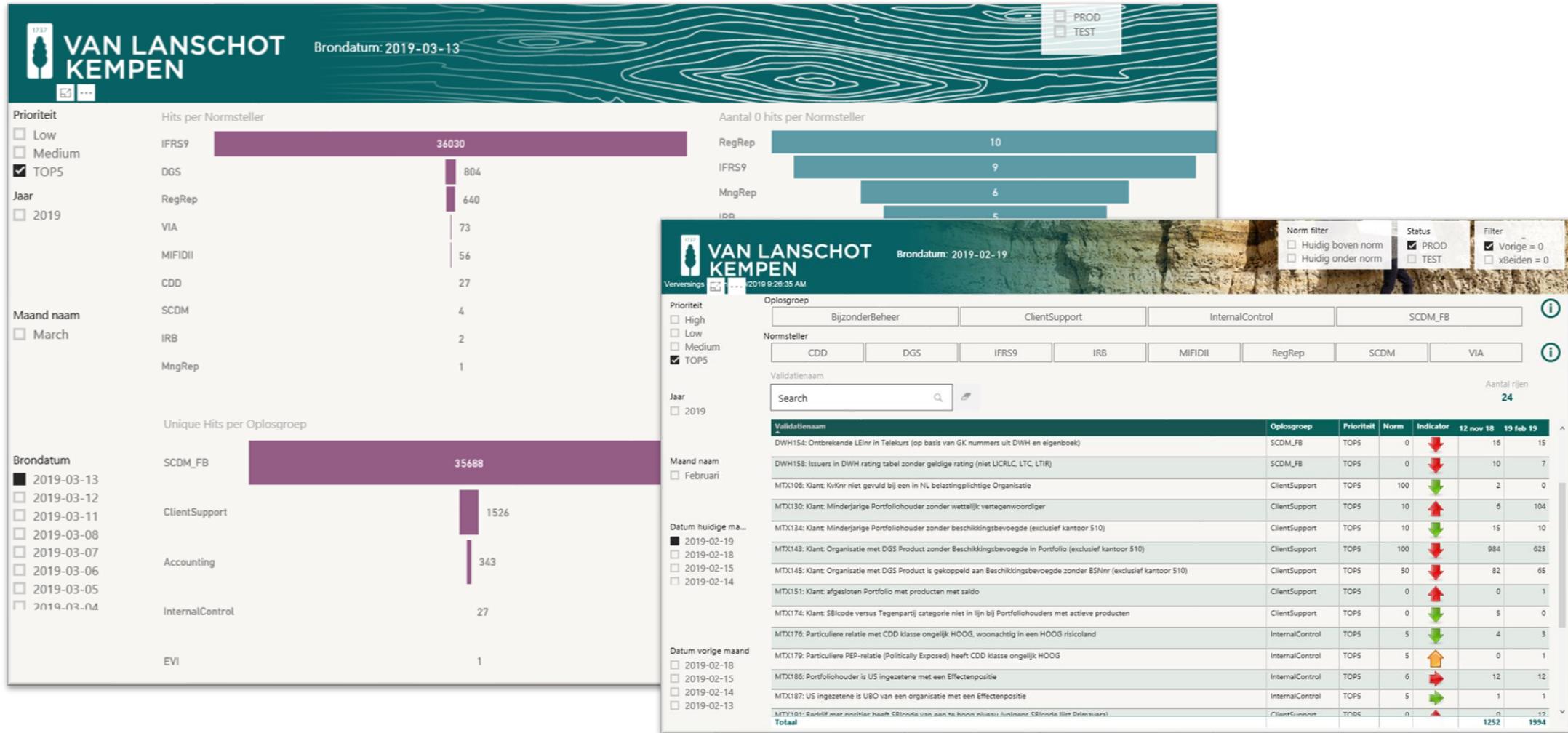
# Agenda

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



# Weekoverzicht suspicious cases

Huidige week

**2018-47**

11/19/2018 11/25/2018

WeekStart

WeekEnd

relatielnr

All ▾

segment

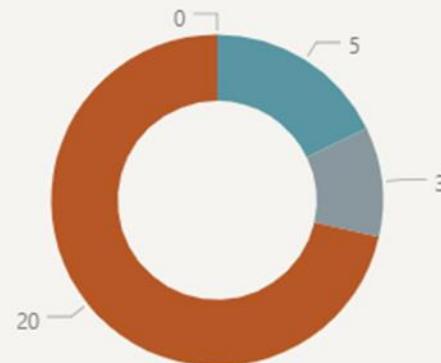
All ▾

weeknr

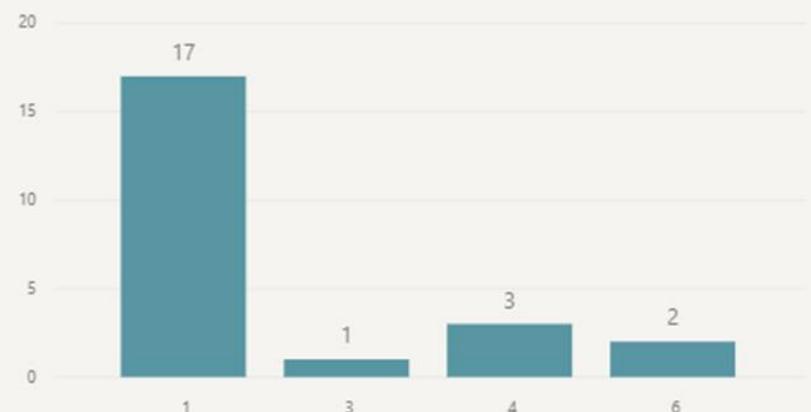
2018-36 ▾

- # 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

# Agenda

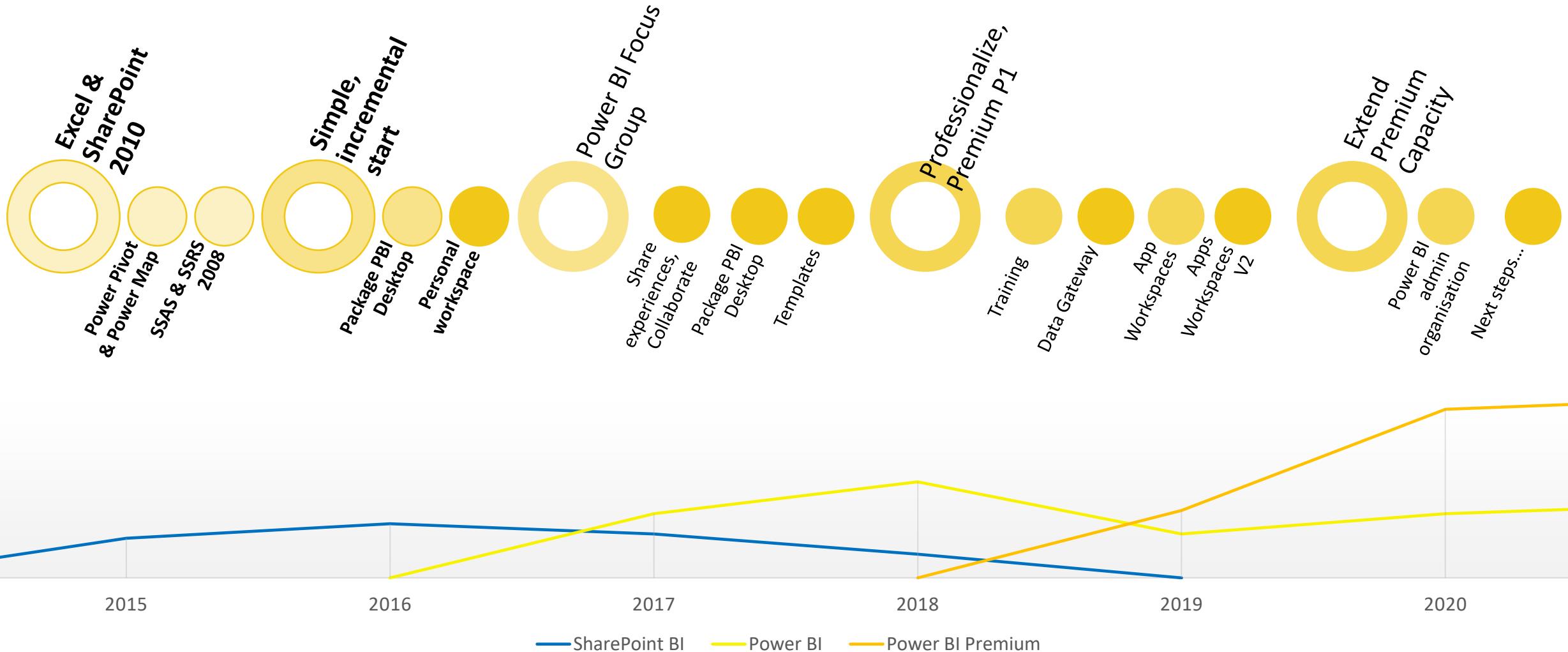
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- Organisation
- Data management
- Reporting
- **Collaboration**
- Premium / Support
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# History and progress

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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 menu with 'Home', 'Favorites', 'Recent', 'Apps', and 'Shared with me'. Under 'Shared with me', there's a yellow oval around the 'Workspaces' item. To the right, a 'Share dashboard' dialog box is open for a workspace named 'SQLSATBE'. It shows 'Share' and 'Access' tabs. The 'Share' tab contains instructions about recipients having the same access level unless row-level security restricts them, a 'Grant access to' section with an 'Enter email addresses' input field, and an optional message area. At the bottom of the dialog, three checkboxes are listed: 'Allow recipients to share your dashboard' (which is checked and highlighted with a red box), 'Allow users to build new content using the underlying datasets', and 'Send email notification to recipients'.

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

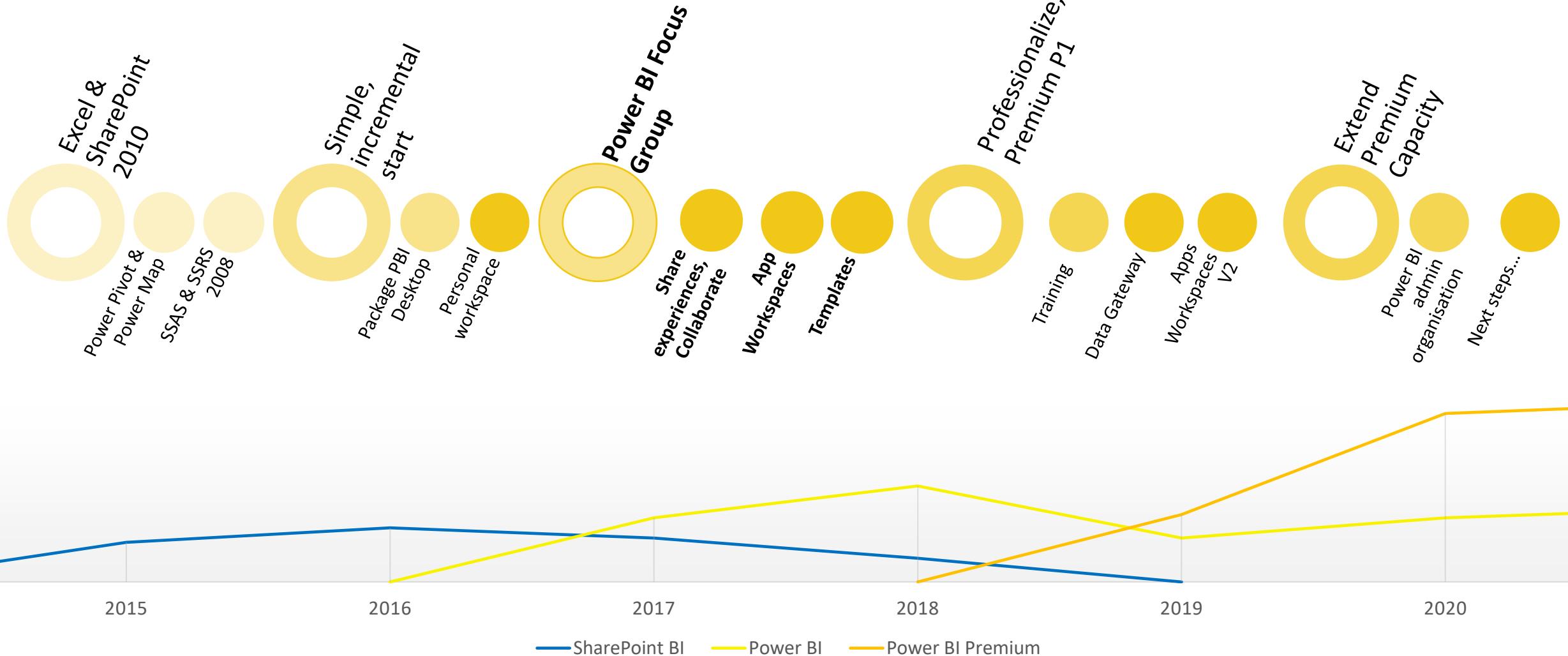


Onedrive for versioning



# History and progress

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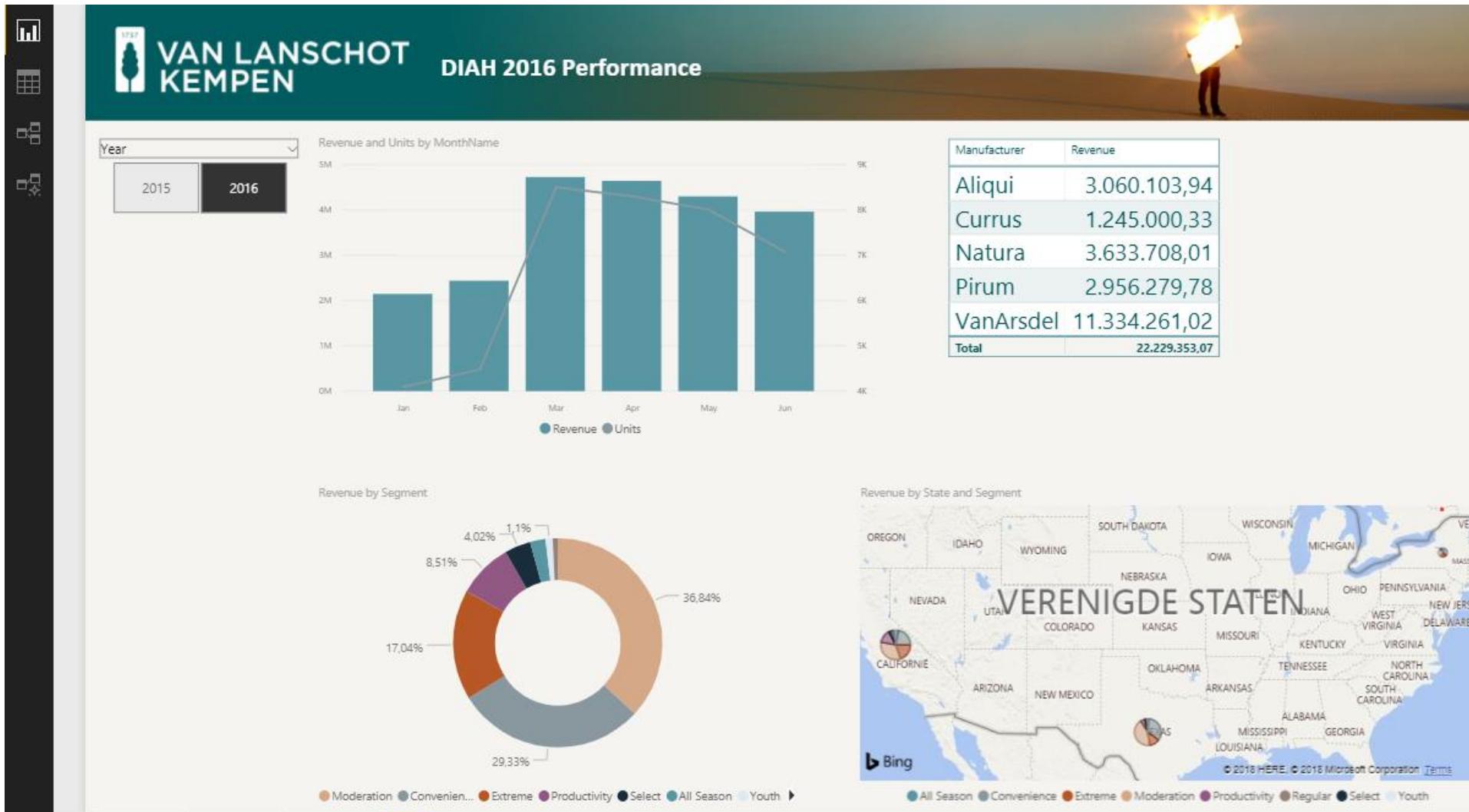
# Power BI at VLK

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- Templates
  - VLK, Kempen, Evi



# Power BI at VLK

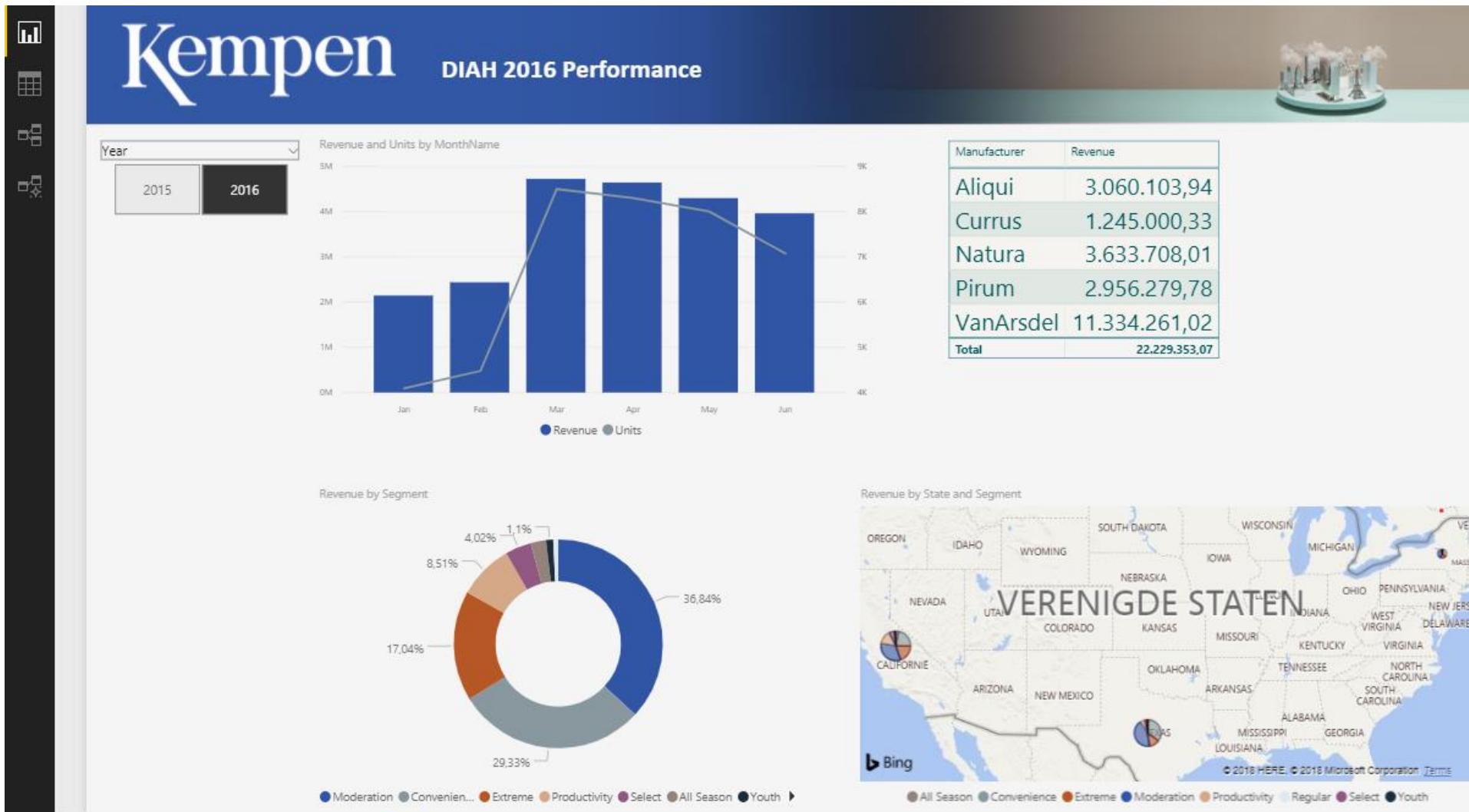


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# Power BI at VLK

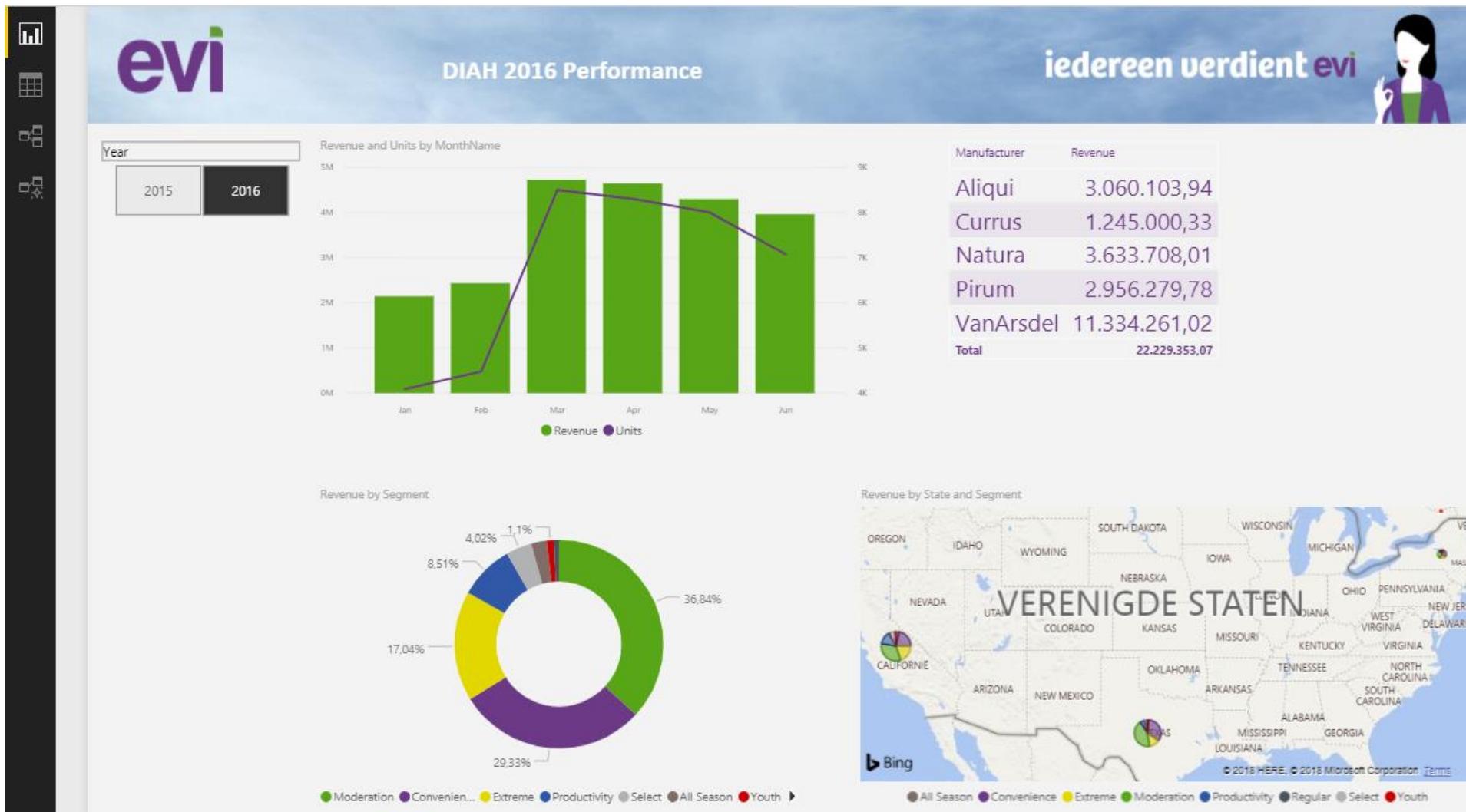


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# Power BI at VLK



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# 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 menu 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's face and upload/delete buttons. The 'Cover image' section has a similar structure. Below these, a 'Theme color' section shows a color swatch with the hex code #323130. At the bottom of the page, there is a navigation bar with icons for Home, Recent, Favorites, and Log Out, followed by a greeting 'Good afternoon, Nicky', a search bar, and links for 'Snelle toegang' and 'Activiteit'.

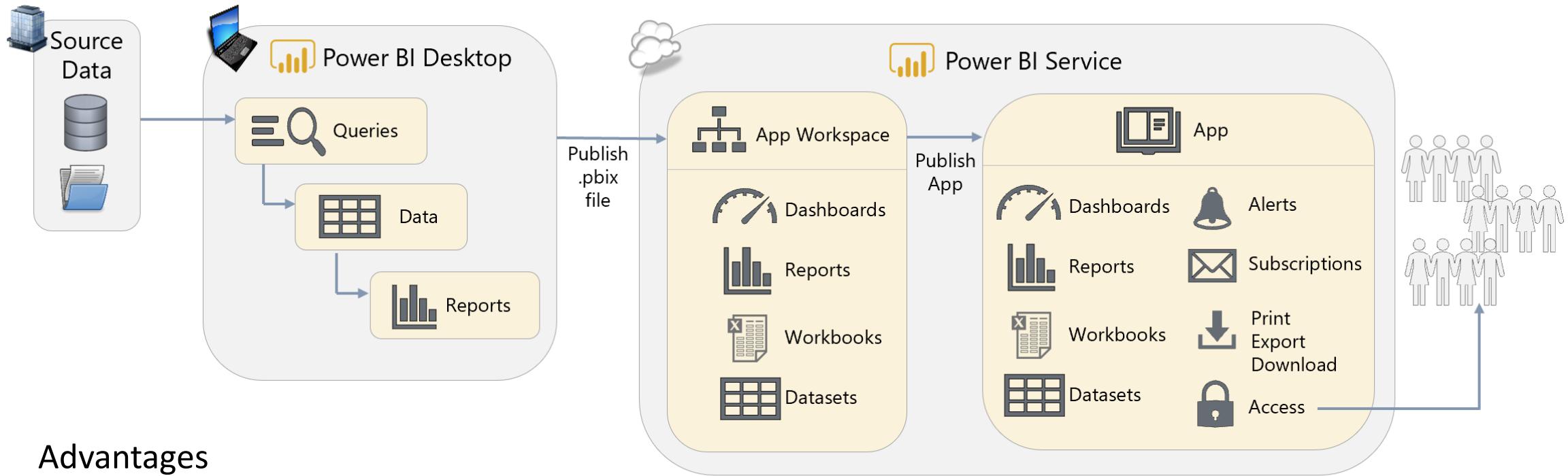
# Power BI at VLK

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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**

# Agenda

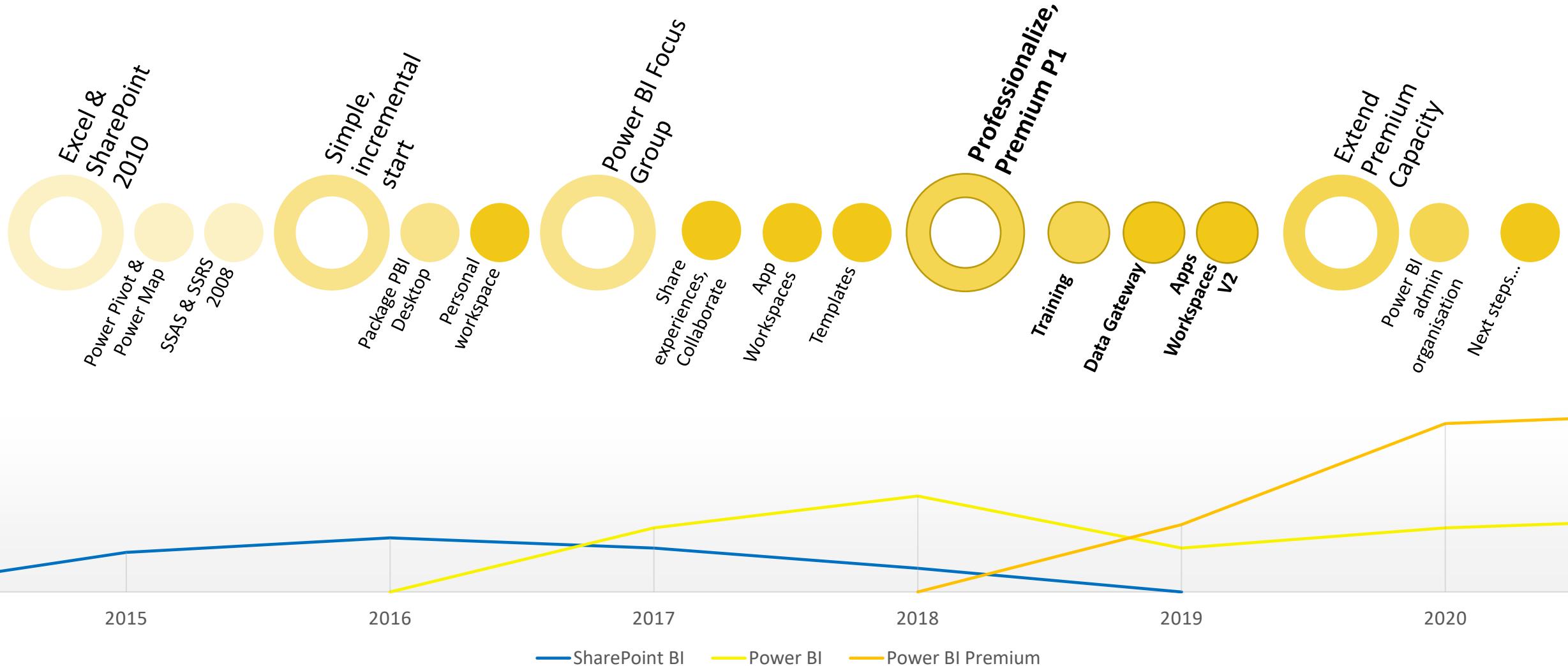
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- Organisation
- Data management
- Reporting
- Collaboration
- **Premium / Support**
- Lessons learned
- Next steps

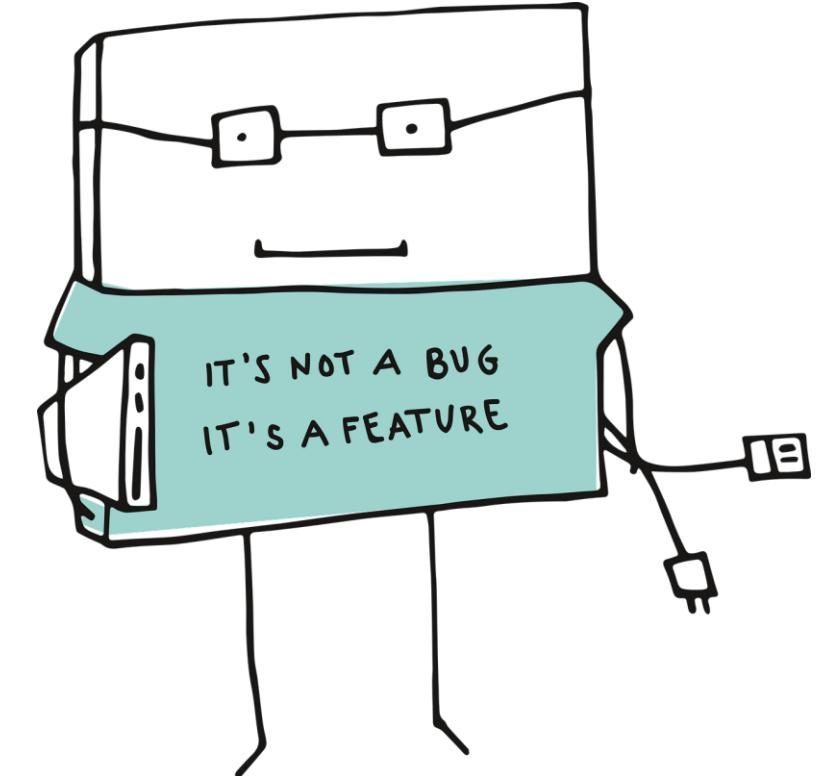


# History and progress

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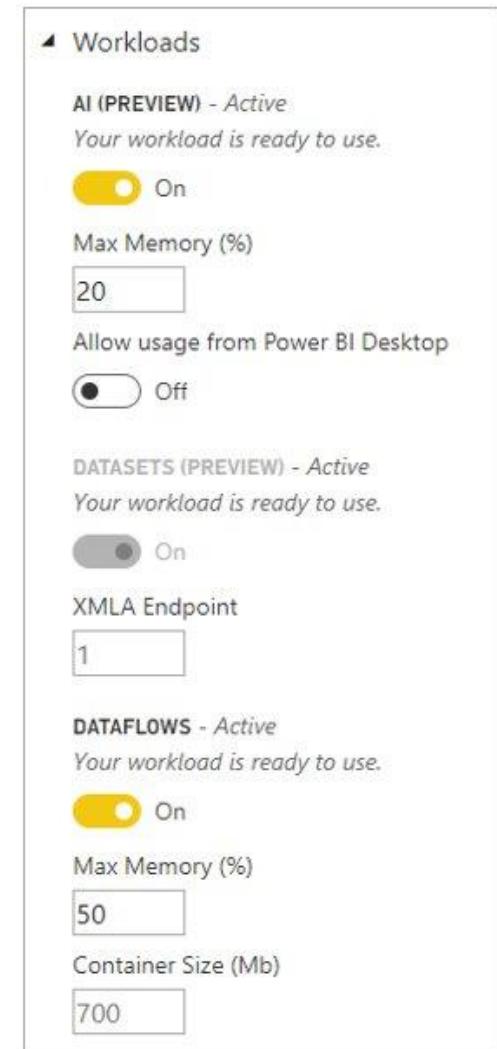


# Power BI Premium



# 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.

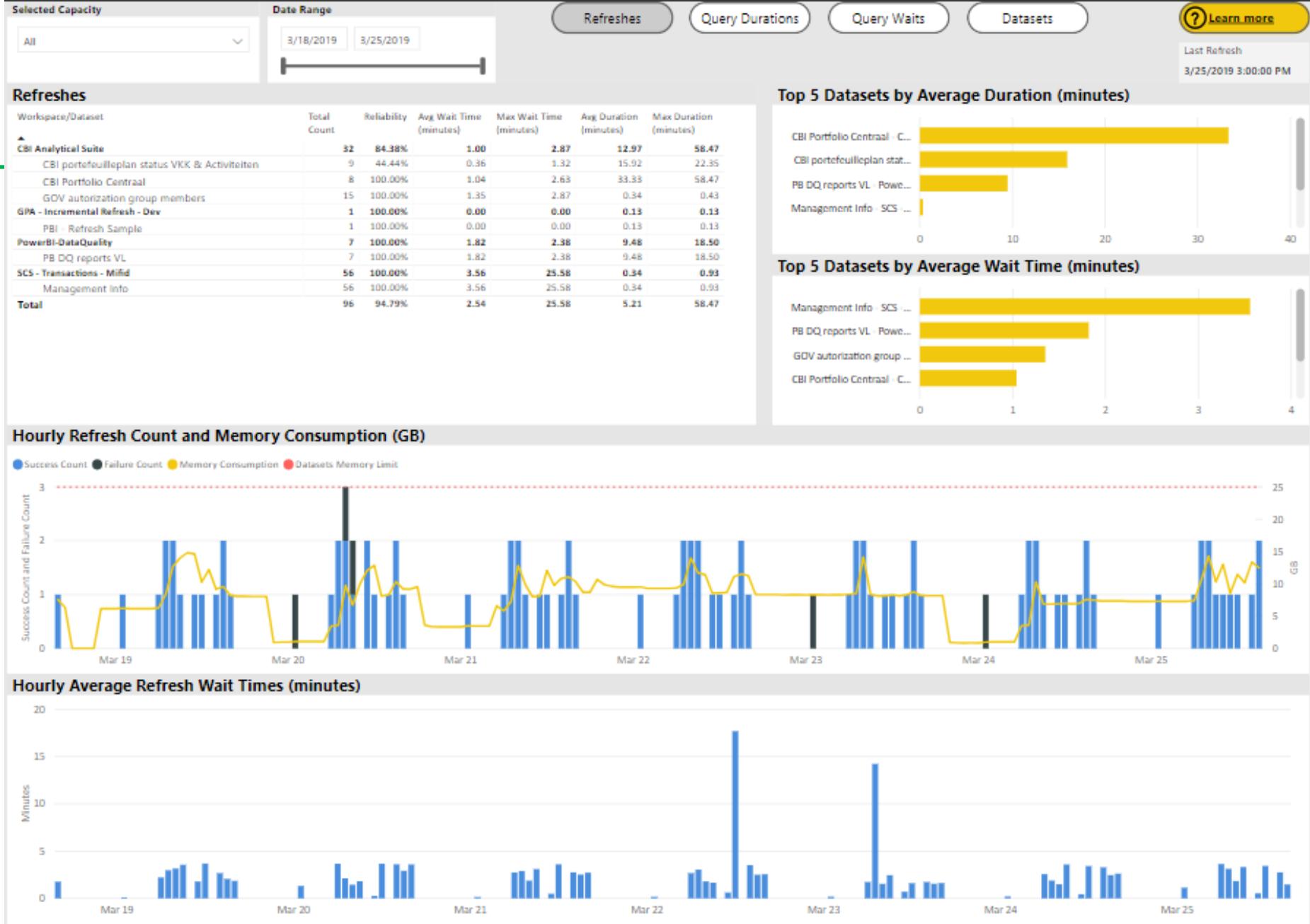


# Premium Capacity Metrics App

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 area displays the "Power BI Premium Capa..." app card. The card features a circular icon with a bar chart and a diamond, the title "Power BI Premium Capa...", the date "MAR 18, 2019", and a "Get more apps from Microsoft AppSource" button.





# 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		
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											



# Professionalize Power BI administration

- Audit via Identity Management
- New workspaces: 3 (A)AD-groups
  - Admins, Members, Viewers

Name
<input type="checkbox"/> PO PowerBI-SCDM-DWH-Viewers
<input type="checkbox"/> PO PowerBI-SCDM-DWH-Admins
<input type="checkbox"/> PO PowerBI-SCDM-DWH-Members

PowerBI-SCDM-DWH-Admins	Admin
PowerBI-SCDM-DWH-Members	Member

The screenshot shows the Power BI Apps interface for the 'SCDM - DWH' workspace. The 'Permissions' tab is selected. Under 'Access', the 'Specific individuals or group' option is chosen. A search bar contains the text 'PowerBI-SCDM-DWH-Viewers'. To the right of the search bar, there is a button labeled 'Enter en'.

# 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

in 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

Apply to:

The entire organization

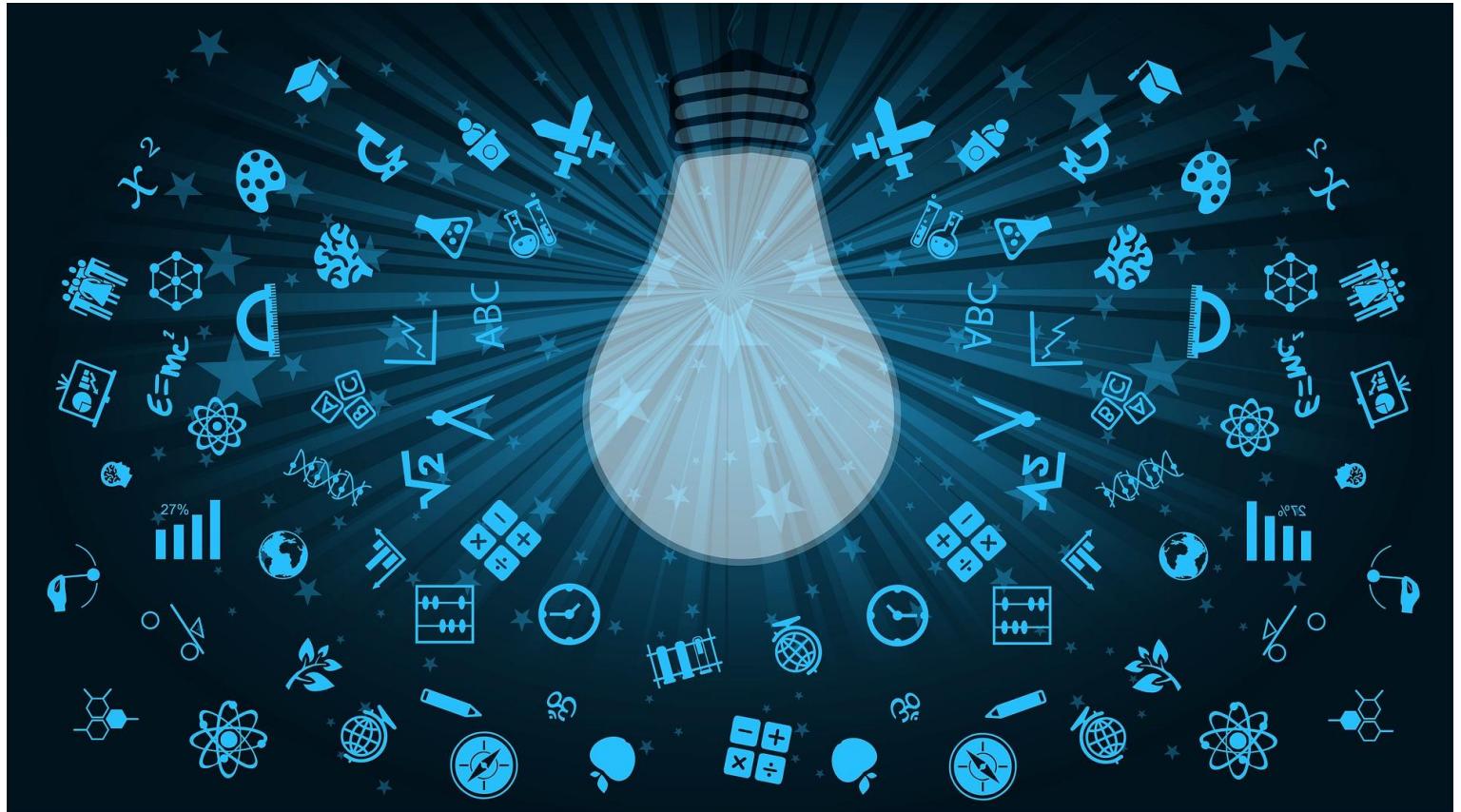
Specific security groups



# Agenda

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- Organisation
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- Premium / Support
- **Lessons learned**
- Next steps



# Knowledge is key

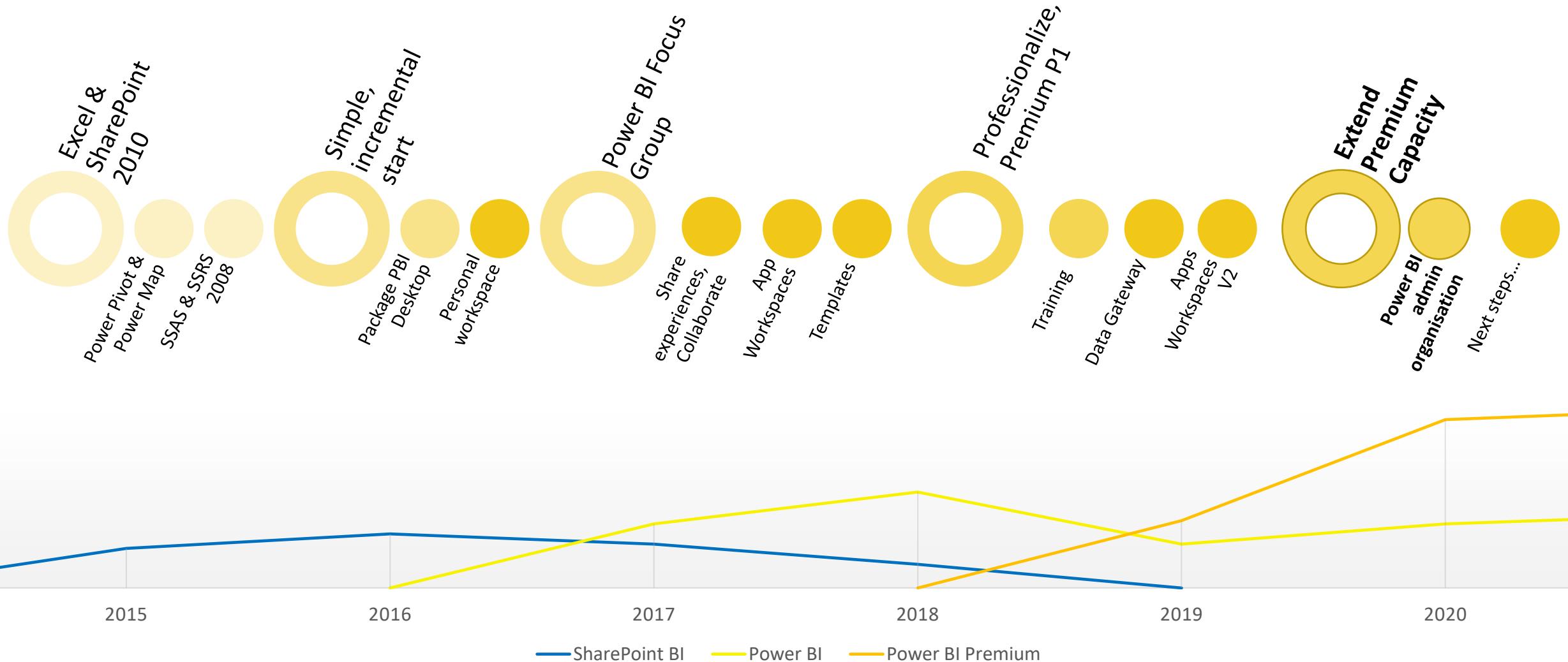
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- Power BI (re)training
- BI Focus Group
  - Start: changing content
  - Now: 2 tracks
    - End users
    - In-depth

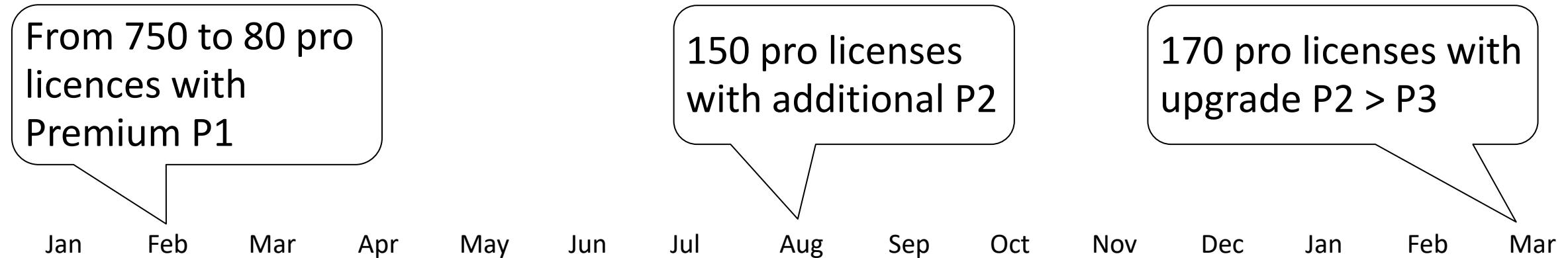


# History and progress

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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



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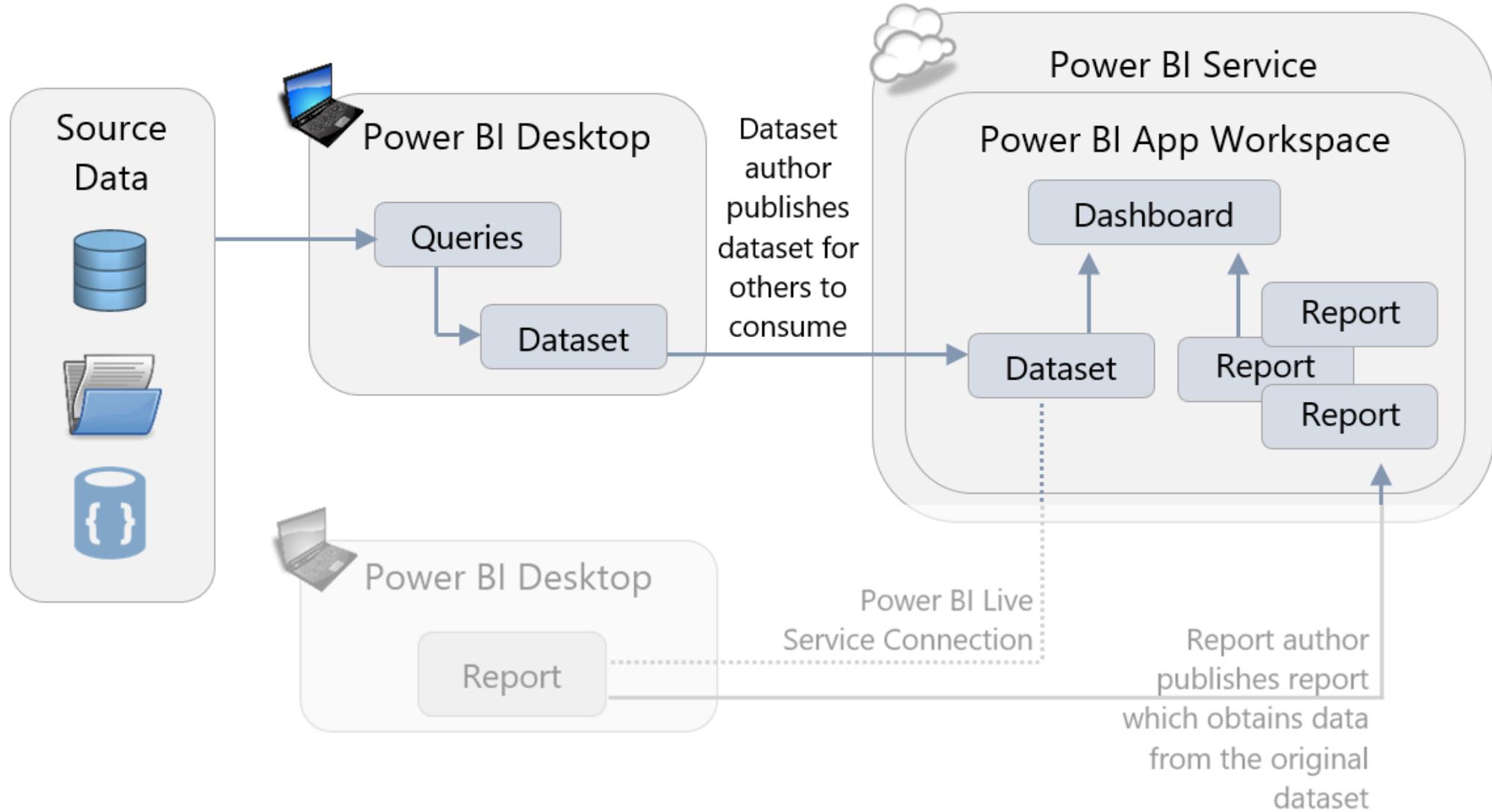


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# Lessons Learned

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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



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# Agenda

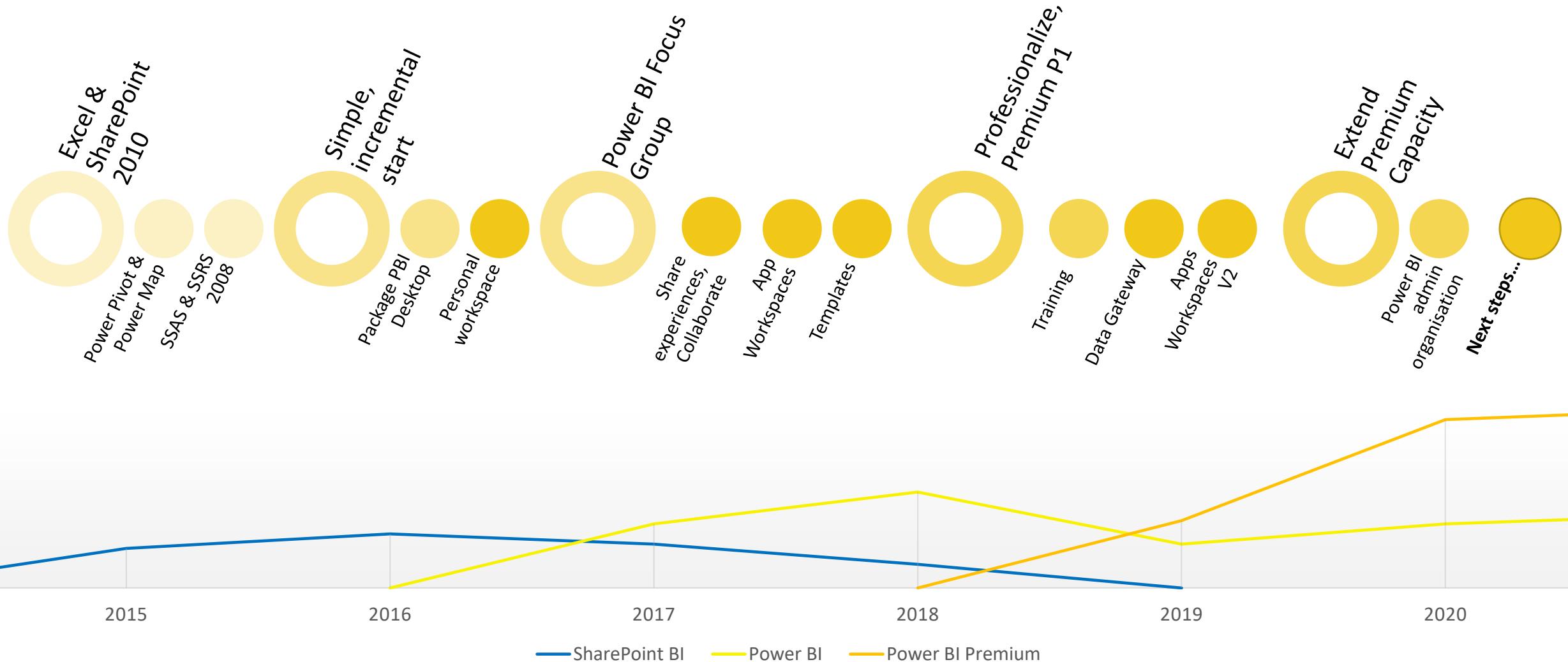
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- Organisation
- Data management
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- Lessons learned
- **Next steps**



# History and progress

---



# 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

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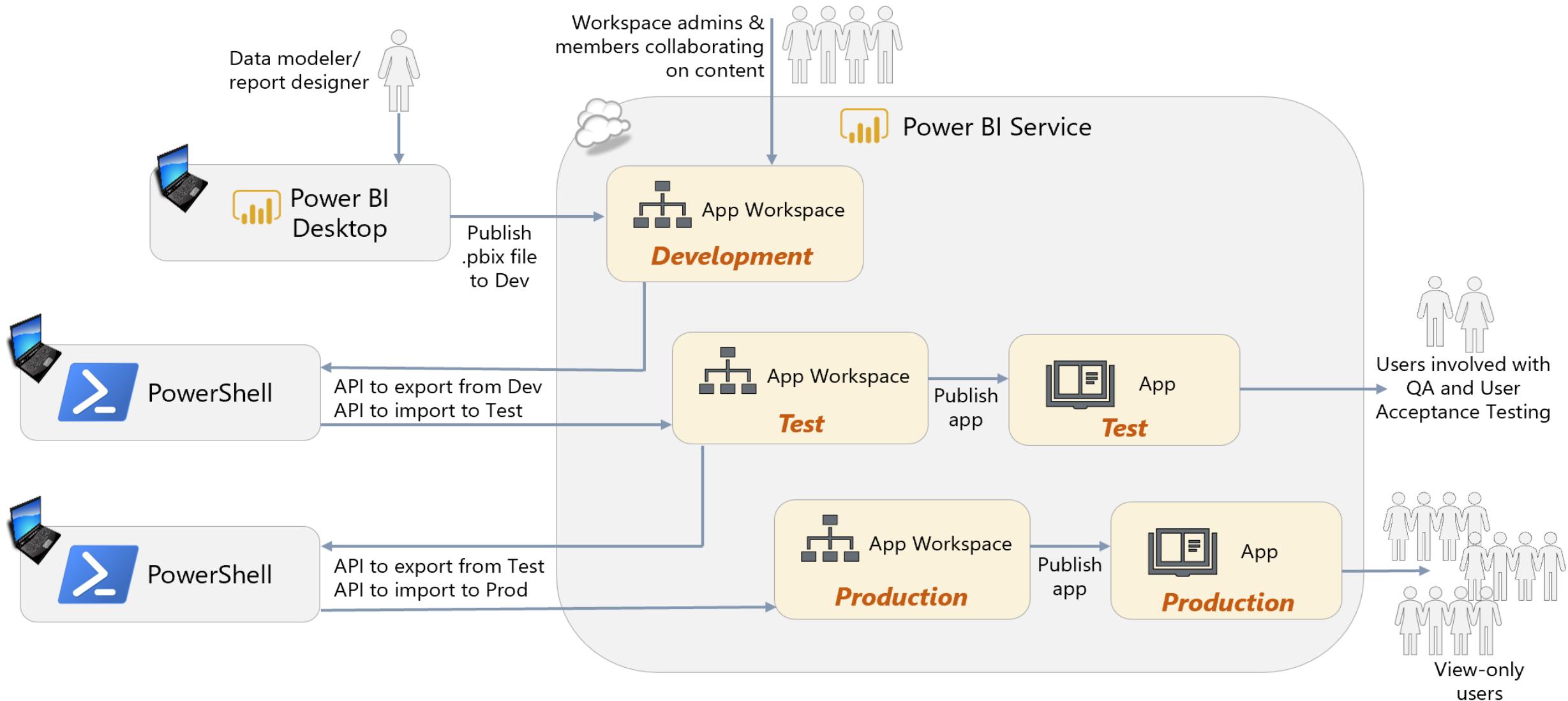
The present is always on the move; this is called future...

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!

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 [www.linkedin.com/in/nickyvanvroenhoven/](http://www.linkedin.com/in/nickyvanvroenhoven/)

# Thanks for watching!

Hope to see you at our next LIVE talk:

**“Reaching Customer Centricity through a CX Insights Framework”**

Tuesday 19 May  
17:00 – 18:00 CET

<https://www.meetup.com/Visser-van-Baars-BI-Big-Data-Network>