



regoUniversity

NASHVILLE • 2022

Apptio BI: Best Practices for Using it in your Organization

Your Guides:
Eric Chan and Eric Self

Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself
- Business Cards

Agenda

- Introduction
- Apptio BI Overview
- Helpful Links
- Available Data Sources
- Why Apptio BI
- Use Cases
- Key Features
- Limitations
- Recent Releases
- Demonstration

Quick Poll

- How many are using Apptio BI today?
- How many users are using it?
- How many reports have been created?

Part I: Introduction



Apptio BI

- Apptio BI is in short, Apptio's self service reporting tool. This tool is geared towards end users and empowers them to create and share their own reports.
- It allows users to create reports, insights, and action plans.

The screenshot displays the Apptio BI user interface. At the top, there's a header with the Apptio BI logo and a 'New Report' button. Below the header, there are tabs for 'Reports' and 'Insights'. A search bar for reports is visible, along with a 'View Collection' dropdown set to 'None'. The main area features a grid of report cards, each with a title, a brief description, and a 'More' button. Below this grid is a section titled 'All Reports' with a filter bar showing 'All', 'Admin', 'Mine', 'Shared', and 'Apptio BI Reports'. Underneath is a table listing various reports with columns for Name, Owner, Created, and Modified.

Name	Owner	Created	Modified
Account Drilldown Report	MINE	4/13/22, 6:59 PM	7/28/22, 6:44 AM
Alex Smith Monthly Dashboard	MINE	4/13/22, 9:17 PM	7/28/22, 7:48 AM
Alex Smith YTD Dashboard	MINE	4/13/22, 6:43 PM	7/28/22, 9:06 AM
Apptio BI Demo Report	MINE	4/21/22, 9:38 AM	8/25/22, 8:58 AM
August Demo Report	MINE	8/25/22, 9:39 AM	8/25/22, 10:03 AM

Helpful Links



[Help Center for Apptio BI](#)



[Release Notes for TBM Studio](#)



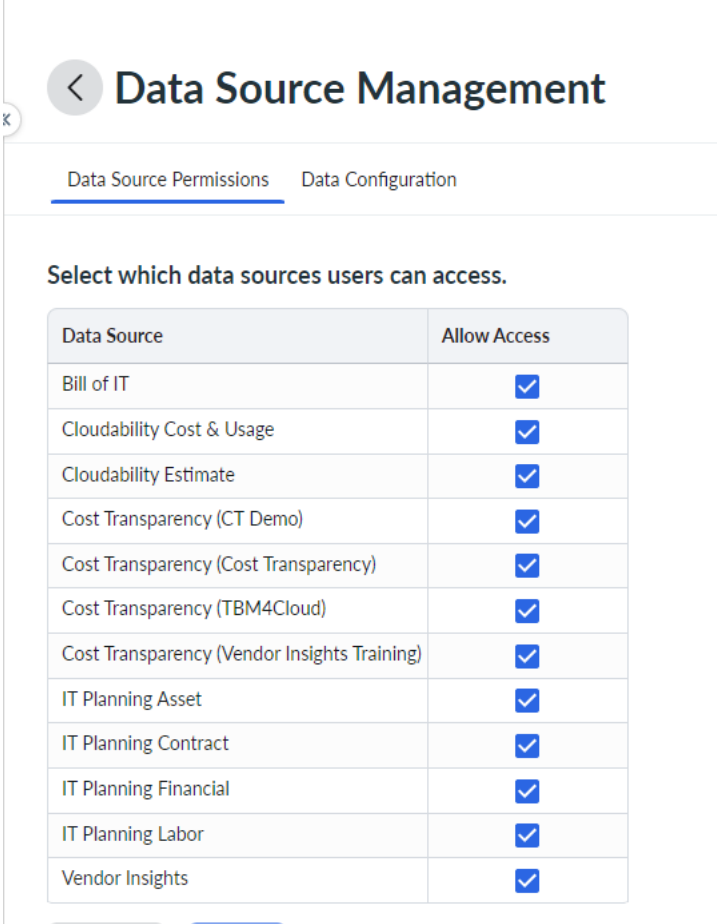
[Apptio BI Community Page](#)



[Apptio BI Learning Plan](#)

Available Data Sources

- Bill of IT
- Cloudability
- Cloudability SaaS
- Cost Transparency
- IT Planning
- Vendor Insights



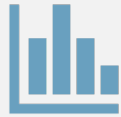
The screenshot shows a mobile application interface for "Data Source Management". At the top, there is a back arrow and the title "Data Source Management". Below the title, there are two tabs: "Data Source Permissions" (which is selected and underlined) and "Data Configuration". The main content area contains the instruction "Select which data sources users can access." followed by a table with two columns: "Data Source" and "Allow Access". The table lists 13 data sources, each with a checked checkbox in the "Allow Access" column.

Data Source	Allow Access
Bill of IT	<input checked="" type="checkbox"/>
Cloudability Cost & Usage	<input checked="" type="checkbox"/>
Cloudability Estimate	<input checked="" type="checkbox"/>
Cost Transparency (CT Demo)	<input checked="" type="checkbox"/>
Cost Transparency (Cost Transparency)	<input checked="" type="checkbox"/>
Cost Transparency (TBM4Cloud)	<input checked="" type="checkbox"/>
Cost Transparency (Vendor Insights Training)	<input checked="" type="checkbox"/>
IT Planning Asset	<input checked="" type="checkbox"/>
IT Planning Contract	<input checked="" type="checkbox"/>
IT Planning Financial	<input checked="" type="checkbox"/>
IT Planning Labor	<input checked="" type="checkbox"/>
Vendor Insights	<input checked="" type="checkbox"/>

Why Apptio BI



Apptio position as go-to tool for reporting



Reduce reliance on TBM organization for reporting



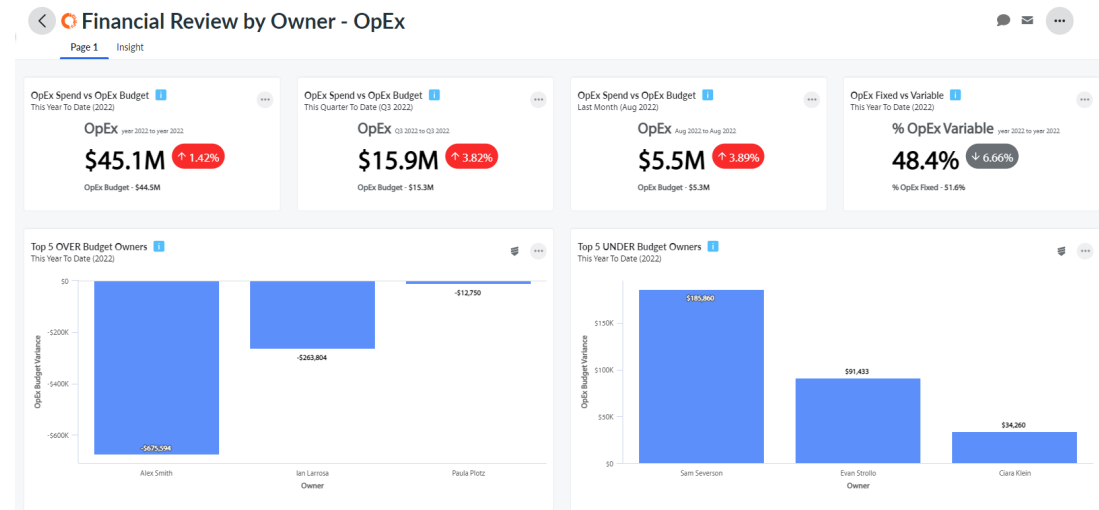
Provide insights and notifications around specific KPIs



A single place to view all Apptio data

Use Cases

- Organizational Dashboards
- Report Subscriptions
- Ad Hoc Reporting
- Row Level Security Reporting
- Insight Notifications

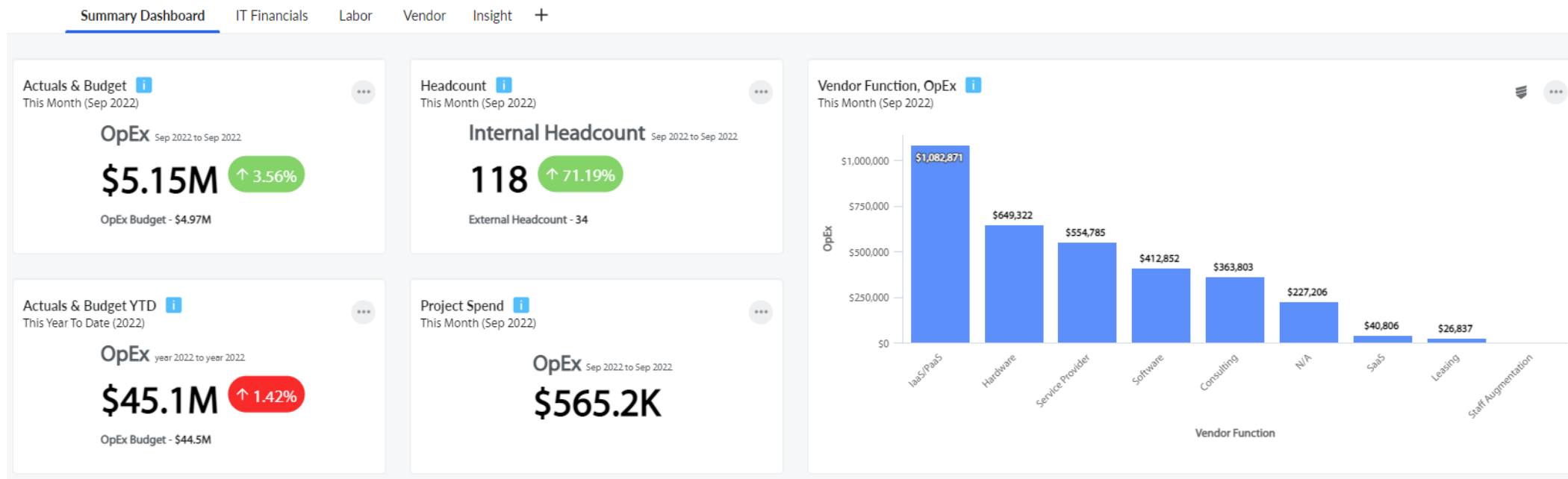


Key Features



Leverage Pages as Report Collections

- The page feature is great in replicating similar functionality as report collections in Cost Transparency Reporting. You can create a singular filtered view and organize the visualizations.



Dynamic Reports with Measure Picker

- Fully customizable tables similar to modifying tables in Cost Transparency with Add Columns

Account Group, OpEx i
This Year To Date (2022)

Account Group ↓	Cost Pool ↕	Jan FY2022	Feb FY2022	Mar FY2022	Apr FY2022	May FY2022	Jun FY2022	Jul FY2022	Aug FY2022	Sep FY2022	Oct FY2022
Telecom	Telecom	\$377,165.38	\$371,708.18	\$383,109.56	\$372,115.06	\$380,597.95	\$384,929.81	\$370,119.17	\$372,859.1		
Technology	Hardware	\$502,203.72	\$250,562.83	\$389,808.78	\$328,470.60	\$253,785.40	\$257,382.56	\$473,849.53	\$255,909.0		
Technology	Telecom	\$309,035.32	\$311,359.92	\$421,774.03	\$471,860.05	\$322,823.65	\$318,145.92	\$339,273.54	\$338,025.4		
Technology	Software	\$525,622.30	\$521,609.24	\$514,817.80	\$519,149.88	\$530,014.36	\$527,911.02	\$544,514.17	\$897,533.30	\$530,332.78	
Technology	Outside Services	\$620,285.44	\$693,805.43	\$732,102.56	\$819,844.51	\$927,768.55	\$1,055,197.41	\$1,097,136.17	\$1,181,453.17	\$1,141,087.55	
Salaries & Benefits	Internal Labor	\$981,482.00	\$978,536.87	\$986,322.08	\$971,373.42	\$981,096.58	\$974,590.30	\$966,699.61	\$985,395.46	\$983,781.89	
Outside Services	Outside Services	\$261,226.55	\$272,927.11	\$250,116.10	\$228,900.17	\$252,235.66	\$240,189.36	\$239,435.89	\$213,261.73	\$226,640.55	
Facility & Office Adm	Other	\$6,433.24	\$6,407.17	\$6,711.20	\$6,443.85	\$6,568.56	\$6,567.51	\$6,697.03	\$6,682.09	\$6,758.40	
Facility & Office Adm	Internal Labor	\$197.58	\$194.71	\$199.13	\$196.90	\$198.01	\$198.68	\$197.92	\$197.98	\$193.81	
Facility & Office Adm	Facilities & Power	\$167,071.46	\$168,696.90	\$170,594.08	\$170,272.64	\$174,143.81	\$174,123.89	\$177,347.68	\$173,335.72	\$174,937.46	
(Total)		\$4,790,872.21	\$4,562,987.46	\$4,945,198.02	\$5,015,207.46	\$4,923,408.86	\$5,043,859.91	\$5,193,858.17	\$5,519,323.29	\$5,153,864.61	

Dimensions

Account Group

Cost Pool

Account Subgroup

Cost Center

Report Subscriptions

- Subscriptions are a great way to keep your users in the know about specific reports available to them.

Subscriptions ×

Use subscriptions to email content to yourself on a regular interval. You can also email an invitation for others to subscribe at the frequency you define.

What do you want to do?

[Subscribe myself](#) [Invite others to subscribe](#)

Users invited to subscribe

Eric Chan ×

Frequency
Monthly ▾

Interval
on day ▾ Day
8 ▾

Send Time
9:30am ▾

Subscription ends

Never

On a date

[Cancel](#) [Invite 1 user to subscribe](#)

Report Collections

- Use report collections to organize reports into groups for easier access

Apptio BI

View, edit, and manage reports.






The screenshot displays the Apptio BI interface with two panels illustrating report collections. Both panels feature a 'Reports' tab and a search bar labeled 'Search Reports'. The top panel shows a dropdown menu with the following options: Financial Org, Engineering Org, Product Org, and Marketing Org. Below the search bar, there is a section titled 'Apptio BI Reports' containing several report cards. One card is titled 'Cloudability Executive View - Cl...' and another is 'ApptioOr Financial Review b...'. A 'Manage Collections' button is visible on the right side of the interface. The bottom panel shows a similar interface but with a different dropdown menu containing: Financial Reports, Labor Reports, Project Reports, and Vendor Reports. The report cards and 'Manage Collections' button are also present in this panel.

Duplicate Reports

- Use the duplicate feature to save time on re-creating reports for specific users or groups

All Reports All Admin Mine Shared Apptio BI Reports

★	Name	Owner	Created	Modified	
	<input type="text"/>	<input type="text"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="mm/dd/yyyy"/>	
☆	Account Drilldown Report	MINE	4/13/22, 6:59 PM	7/28/22, 6:44 AM	⋮
☆	Alex Smith Monthly Dashboard	MINE	4/13/22, 9:17 PM	7/28/22, 7:48 AM	
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☆	August Demo Report	MINE	8/25/22, 9:39 AM	9/1/22, 10:18 AM	
☆	Copy of Apptio BI Demo Report	MINE	8/25/22, 9:09 AM	8/25/22, 9:31 AM	
☆	Eric Testing Demo Report TBD	MINE	4/21/22, 7:29 AM	8/2/22, 10:15 AM	⋮

-  Set as home report
-  Share
-  Duplicate
-  Reassign Ownership
-  Delete

Limitations

- Limitations on filtering data on reporting
- No time selection for Cost Transparency
- Color customization on visualizations
- Custom Formula Calculated Metrics only available in dollars
- Uses only Production data
- No API for visualizations
- Limited to data within last 12 months



Recent Releases

- Data Sources now include Projects within Cost Transparency
- Multiple Pages
- Measure Picker
- Additional Out of the Box reports for IT Planning and Cost Transparency
- Text Box Visualizations

Discussion

- For anyone that's using Apptio BI in your organization today, can you share how you are leveraging it? What was your process for deploying it?
- For those that haven't started using it, what are your blockers for taking advantage of it?



Deployment Considerations

- Who will use it? (TBMA's, End users, Execs)
- When will it be used? (OOTB vs Custom vs Apptio BI)
- How will you manage it? (training, standardization)



Demo



Questions?

