



**rego**University

NASHVILLE • 2022

# IT Planning Best Practices

**Your Guides:**  
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# Introductions

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

# Quick Poll

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- How many are using IT Planning today?
- Are your cost center owners logging into ITP and managing their forecasts/budgets directly in the tool?

# Agenda

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- Custom layouts
- Bookmarks
- Dropdown and autofill
- Cost object permissions
- Dashboard reports
- Targets
- Change history / Event Log
- Data input enforcement
- Managing archive
- Stay on top of product updates
- Q&A / Ideas & Suggestions

# Part 2: ITP Best Practices



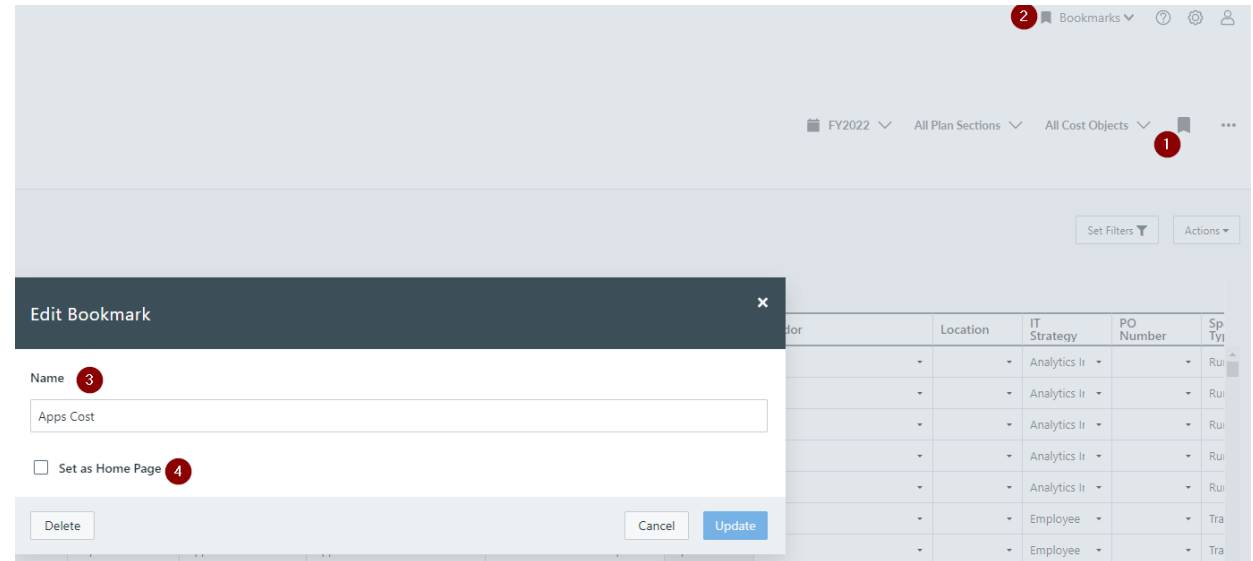
# Custom Layouts

- Allows you to set users up with layouts specific to them
- Makes the use of ITP Clearer and more straight forward
- Streamlines the planning and forecasting process
- Make layouts Public or Private
- Can hold on to filters

The screenshot displays the 'Expenses' section of the Inditex system. At the top, there are summary cards for 'OPEX TOTAL: FY2022' and 'CAPEX TOTAL: FY2022', both showing '\$0'. Below these are navigation tabs for 'Summary', 'Labor', 'Contracts', 'Assets', and 'Other'. A filter bar shows 'FY22 - FY23', 'All Plan Sections', and 'All Cost Objects'. A table of expenses is visible, with columns for 'Cost Object Type', 'Cost Object', 'Cost Center', 'Account', 'Account Expense', 'Vendor', 'Location', 'IT Strategy', 'PO Number', 'Spend Type', 'Contract ID', and 'P'. A custom layout overlay is shown on the left side of the table, with red boxes and numbers 1-4 highlighting specific elements: 1. 'Layout +', 2. 'Public', 3. 'Save As...', and 4. 'Manage Layouts...'. The table data includes rows for various departments and cost centers, such as 'Department - Apps - Back Office' and 'Department - Apps - Line of Bus', with associated accounts like 'Meals & Entertainment' and 'Employee Training & Devel'.

# Bookmarks

- Allows users to bookmark important areas to navigate quickly
- Holds filters
- Can set homepage to allow users to set the most used view as a default
- Quickly set up different views for your workflow





# Drop Down and AutoFill

- Give users only the ability to pick from a dropdown list or a pre-populated list.
  - Limits free text errors
  - Allows for quicker population of cells
  - Standardized and normalized data.
- Auto fill give users ability to enter needed data that can be predetermined
  - Allows for quicker population of cells
  - Standardized and normalized data

Cloud Products	Activity Code	Application	Cost Object Type ↑	Cost Object ↑	Cost Center	Account	Account: Expense
ama			Department	Apps - Back Office	Apps - Back Office	Meals & Entertainment	OpEx
Amazon API Gateway			Department	Apps - Back Office	Apps - Back Office	Moving Allowances	OpEx
Amazon AppStream			Department	Apps - Back Office	Apps - Back Office	Professional Memberships	OpEx
Amazon Athena			Department	Apps - Back Office	Apps - Back Office	Travel Expense - Other	OpEx
Amazon CloudFront			Department	Apps - Back Office	Apps - Back Office	Travel Expense - Other	OpEx
Amazon CloudSearch			Department	Apps - Back Office	Apps - Back Office	Other Admin Support	OpEx
Amazon DynamoDB			Department	Apps - Back Office	Apps - Back Office	Professional Memberships	OpEx
Amazon EC2 Container Registry (ECR)							
Amazon EC2 Container Service							

# Cost Object Permissions

- Gives ability to capture sensitive data without risk of data being seen by unwanted users.
- Can declutter slicers and data to make use of the tool cleaner and more smooth
- Can allow access from multiple different levels.
- Built off the cost center hierarchy

Cost Object Permissions

The Enforce View Permissions setting on the Company Profile page is disabled. All users can view active plans in Open and Final state.

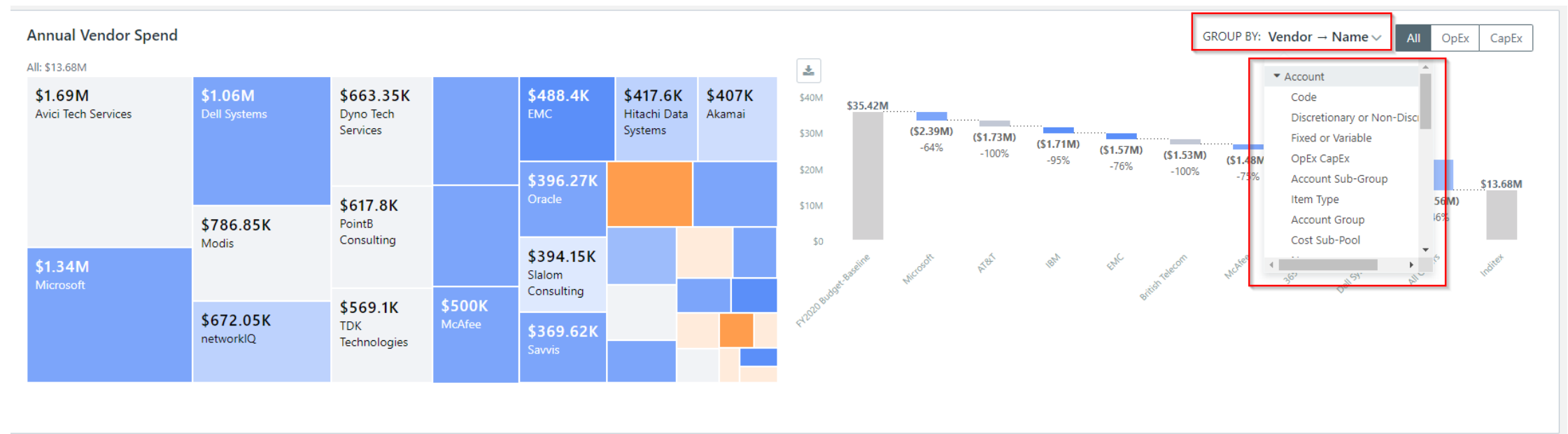
Permissions | Departments | Projects

View:  Hierarchy  Li

Cost Object	User Name	Edit Level	Can View Sensitive Columns	Can View Sensitive Financials
All Departments	[Redacted]	Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CC-330 - Network Services	[Redacted]	Edit & Submit	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>

# OOTB Reports

- Out of the box reports can provide a lot of detail
- Less customizable than CT but can be customized in a few areas.
- Great views on differences between different plans or forecasts.



# Discussion

- What challenges have you faced with using/implementing IT Planning?



# Targets

APPTIO Budget: Open

IT Planning

Forecast v2

CAPEX TOTAL: FY2021 \$0 TARGET: \$3.46M VARIANCE: -100%

TOTAL HEADCOUNT (AVG): FY2021 173.02 TARGET: 157.75 VARIANCE: 10%

Departments All Departments

All Plan Sections

Departments

Projects

All OpEx CapEx

Months Quarters Years

FY2021 Budget Budget: Open

## Targets

OPEX CAPEX LABOR

All Departments Target: FY2021

**\$49.37M**

Plan \$44.34M

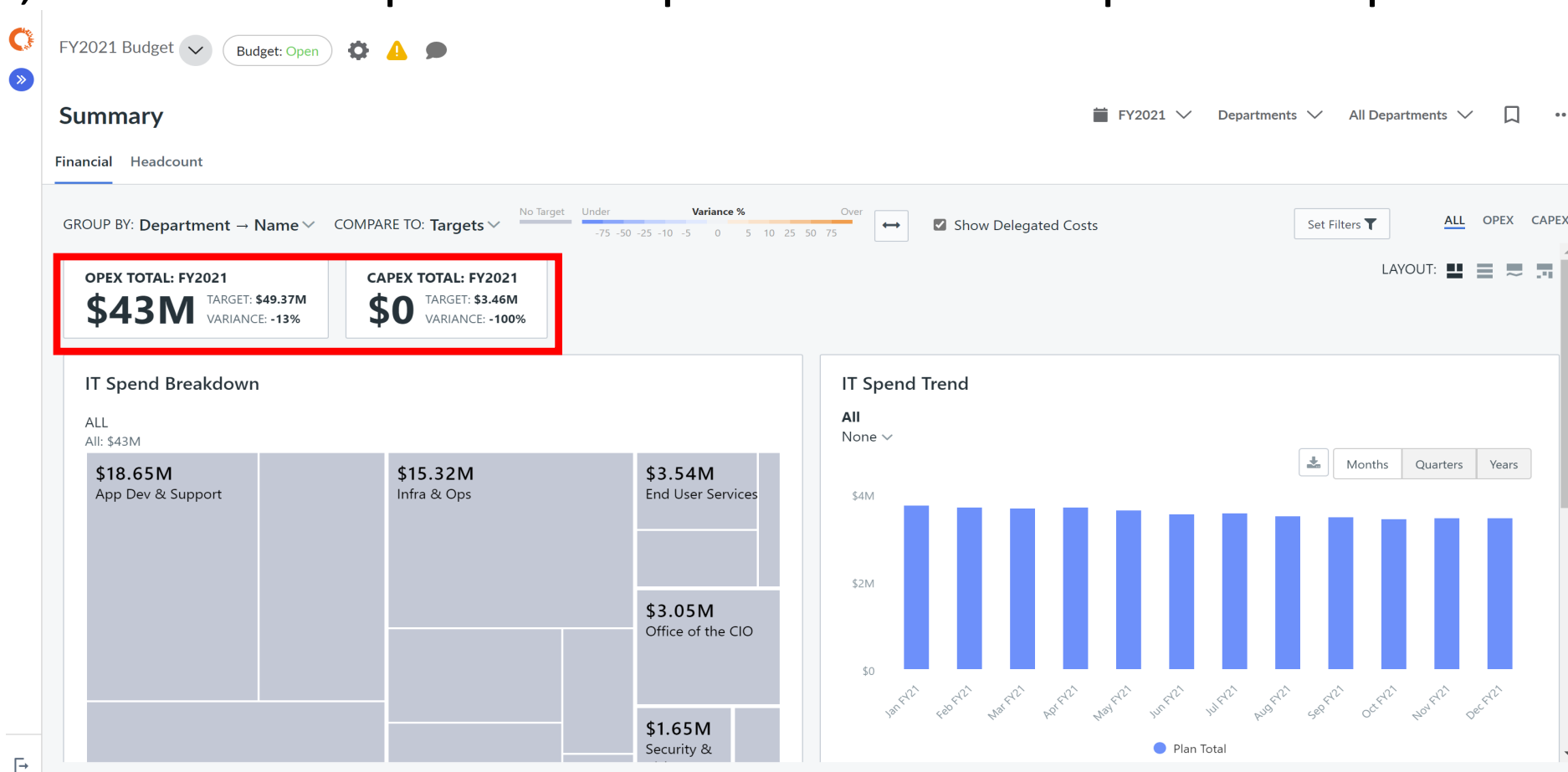
Remainder \$0

Show Delegated Costs

Cost Object	Name	Currency	Target	Total	Var	Var %
	(REMAINDER)		0			
	All Departments	USD	49,367,105	44,341,919	(5,025,186)	-10.18%
APPS	App Dev & Support	USD	16,417,802	19,376,879	2,959,077	18.02%
EUS	End User Services	USD	5,791,980	3,540,830	(2,251,151)	-38.87%
I&O	Infra & Ops	USD	21,364,932	15,816,384	(5,548,547)	-25.97%
CC-390	Office of the CIO	USD	2,640,056	3,097,085	457,029	17.31%
CC-395	Program Office	USD	1,161,649	861,459	(300,190)	-25.84%
CC-370	Security & Risk Mgmt	USD	1,990,685	1,649,282	(341,403)	-17.15%

# Targets

- Targets are visible in the Dashboard, Summary, Expenses, and Ledger views of a budget, next to the OpEx and CapEx KPIs at the top of the report.



# Change History / Event Log



Change History

## Event Log

Start Date 11/01/2021 End Date 08/24/2022

	Timestamp	Event Type	Container	Item Type	User
	4/15/22, 11:51 AM	Export Line Items	FY2021 Budget	Labor Line Item	damian.boune
	4/15/22, 11:49 AM	Export Line Items	FY2021 Budget	Allocation	damian.boune
	4/15/22, 11:45 AM	Export Line Items	FY2021 Budget	Allocation	damian.boune
	4/15/22, 11:16 AM	Export Line Items	FY2021 Budget	Labor Line Item	damian.boune
	4/15/22, 11:11 AM	Export Line Items	FY2021 Budget	Labor Line Item	damian.boune
	4/15/22, 11:07 AM	Export Line Items	FY2021 Budget	Labor Line Item	damian.boune
	4/15/22, 10:46 AM	Export Line Items	FY2021 Budget	Allocation	damian.boune

Show/Hide Columns

IT Planning

Planning >

Spend Management >

Change History >

Event Log

Configuration >

# Change History / Event Log

## Event types in Change History

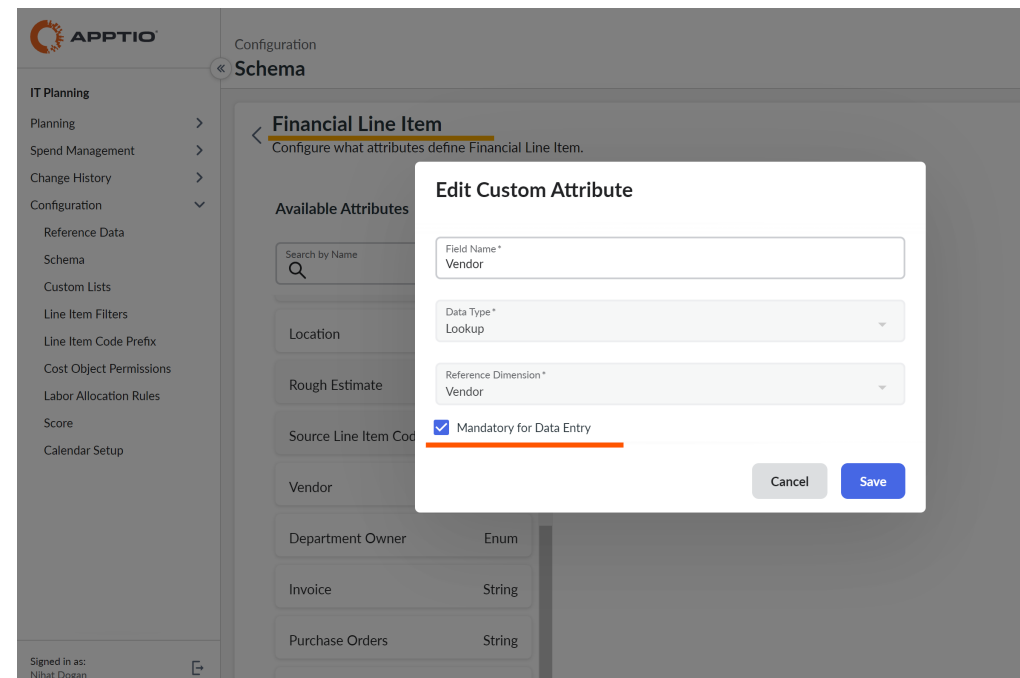
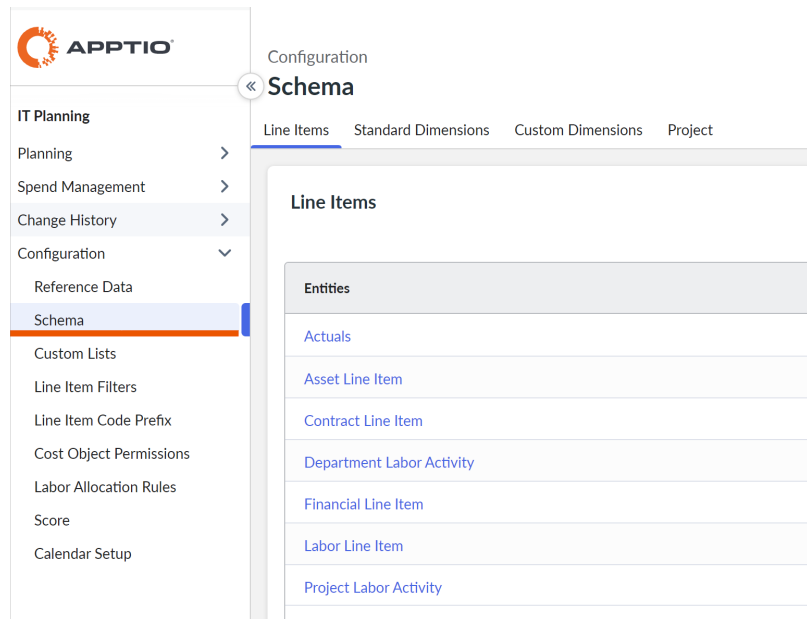
Line Item Events	Plan Management Events	Configuration Events
Add Line Item	Create Plan	Add Column
Update Line Item	Rename Plan	Update Column
Delete Line Item	Delete Plan	Delete Column
Import Line Items	Archive Plan	Change Identifier
Export Line Items	Restore Plan	Publish Reference Data
Import Actuals	Finalize Plan	Revert Reference Data
Import Reference Data	Reopen Plan	Export Reference Data
Publish Plan Data	Reject Cost Object Plan (*)	Import Reference Data
	Approve Cost Object Plan	Add Custom List
	Submit Cost Object Plan	Update Custom List
	Unlock Cost Object Plan	Delete Custom List
		Add Custom Dimension
		Delete Custom Dimension
		Add Line Item Filter
		Edit Line Item Filter
		Update Reference Data in Plan

(\*) Return comment can be found in the Plan Status section.



# Data Input Enforcement

Enforcing data input through “Mandatory for Data Entry” checkbox for improved data quality & reporting



# Managing Archive

The screenshot shows the APPTIO 'Plans' page. On the left is a navigation menu with categories like IT Planning, Planning, Dashboard, Variance Analysis, Expenses, Ledger, Status, Plans, Spend Management, Change History, and Configuration. The 'Plans' section is active, showing a list of plans with columns for Name and checkboxes. A blue box highlights the list of plans, and a red arrow points from the 'FY2019 July Forecast v2' entry to the dashboard.

Name
FY2019 Budget v2
FY2019 July Forecast
FY2019 July Forecast v2
FY2020 Budget
FY2020 January Forecast
FY2021 Budget

The screenshot shows the 'FY2021 Budget' dashboard. At the top, it says 'Budget: Open' with a warning icon. The main heading is 'Dashboard' with a 'COMPARE TO: FY2019 July Forecast v2' dropdown. Below this, there are two large metrics: 'OPEX TOTAL: \$62' and 'CAPEX TOTAL: \$4.19'. A red box highlights a 'Plans' dropdown menu that lists: 'FY2019 July Forecast', 'FY2020 Budget', 'FY2020 January Forecast', 'FY2019 July Forecast v2', and 'FY2019 Budget v2'. A red arrow points from this menu to the 'Manage Compare Shortcuts' dialog.

The screenshot shows the 'Add Visualization to Report' dialog. It has tabs for 'Data' and 'Options'. Below the tabs, it says 'All fields are required unless indicated as optional.' There is a 'Data Source and Measures' section with a dropdown menu set to 'IT Planning Financial'. Below that is a search box for 'Plan Name' containing a list of plans: 'FY2019 Budget v2', 'FY2019 July Forecast', 'FY2019 July Forecast v2', 'FY2020 Budget', 'FY2020 January Forecast', and 'FY2021 Budget'. A red arrow points from the 'Manage Compare Shortcuts' dialog to this list.

The screenshot shows the 'Manage Compare Shortcuts' dialog. It has a 'Compare Current Plan to' dropdown menu with a red box around it. The dropdown menu is open, showing a list of comparison options: 'Please select a comparison', 'FY2019 July Forecast', 'FY2020 Budget', 'FY2020 January Forecast', 'FY2019 July Forecast v2', and 'FY2019 Budget v2'. To the right of the dropdown are several 'Alignment Method' settings, each with a 'Select value' dropdown and a 'Show by default' checkbox. At the bottom are 'OK' and 'Cancel' buttons.

# Managing Archive

Home Configure **Publish** Import Status

Select a plan and line items to publish to Cost Transparency.

Select a plan

- All Line Item Types
  - Asset
  - Contract
  - Financial
  - Labor
  - Project Labor

Publish

- Customer Selection
- Access Administration
- Multi-Currency Configuration
- Company Profile
- Cost Transparency Integration**
- About The Application

Home Configure **Publish** Import Status

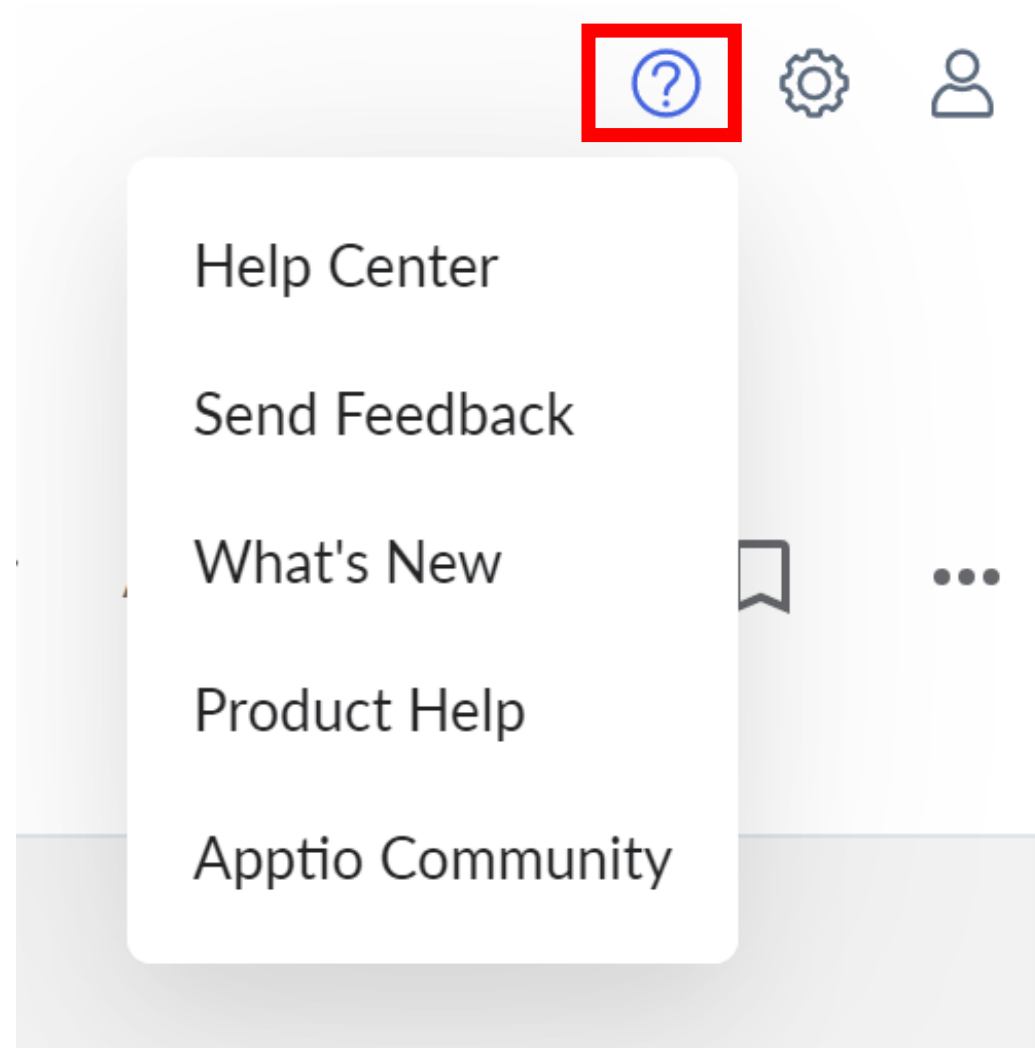
Select a plan and line items to publish to Cost Transparency.

Select a plan

- Select a plan
- ABBV LRP (2021-2025)
- April 2018 Forecast - DG Sandbox
- Finkler FY2020 Budget POC
- FY2017 Budget
- FY2017 Budget 3 Year**
- FY2017 Budget 4 year
- FY2017 Budget Backup
- FY2018 April Forecast
- FY2018 April Forecast 5-29-2018
- FY2018 April Forecast Draft
- FY2018 April Forecast Final
- FY2018 Budget
- FY2018 Budget - DG Changes Yall
- FY2018 Budget - DG Sandbox
- FY2018 Budget - What-If
- FY2018 Budget DG
- FY2018 Budget with Investments
- FY2018 Budget with Investments wo BAU
- FY2018 Volume Actuals

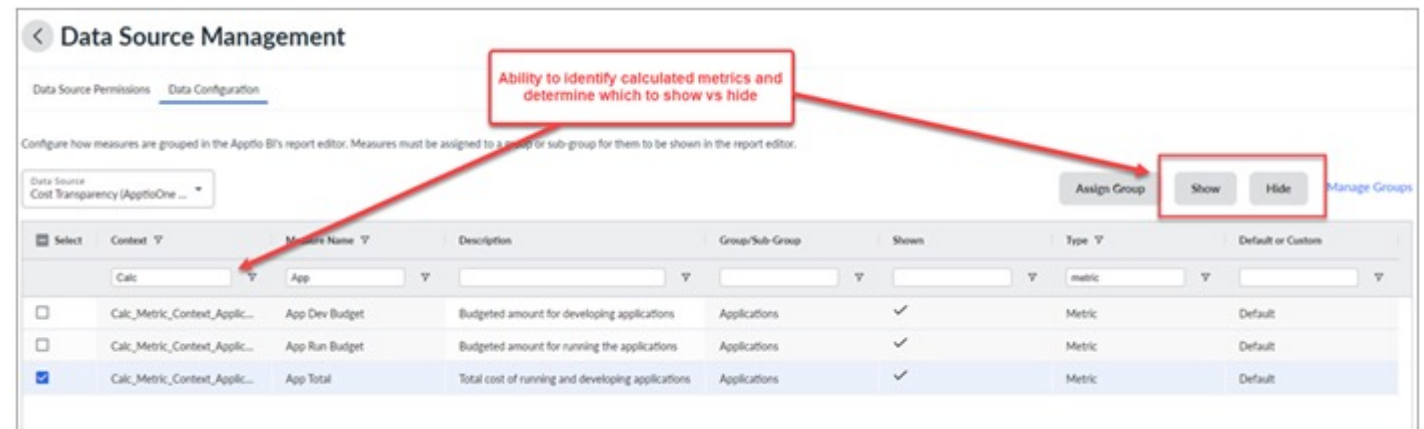
# Stay On Top of Product Updates

- Help Center
- Product Help
- What's New
- Apptio Community
  - Release Notes
  - Learning Plan
  - Enhancement Ideas
  - Articles & Videos
  - Blogs
  - Q&A



# Apptio BI

- Exposed Calculated metrics
  - Out-of-the-box (OOTB) and customer calculated metrics from the Cost Transparency projection are now available in Apptio BI. Custom calculated metrics are managed in Data Source Management where they need to be assigned to a group to be visible in the Apptio BI Visualization editor.
- Released 1.11.0 April 29, 2022



# Where to find Apptio Updates?

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- Has anyone used any of these features?
- Has anyone used these for a unique use case?
- Has anyone not used these features for a reason?

# Questions?



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## Instructions for PMI credits

- Access your account at [pmi.org](https://pmi.org)
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Provider = **Rego Consulting**
- Class Name = **regoUniversity**
- Course **Description**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**



Let us know how we can improve!  
Don't forget to fill out the class survey.



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