



regoUniversity

SAN DIEGO • 2023

Apptio BI: Bringing Software Solutions Together

Hands On Deep Dive

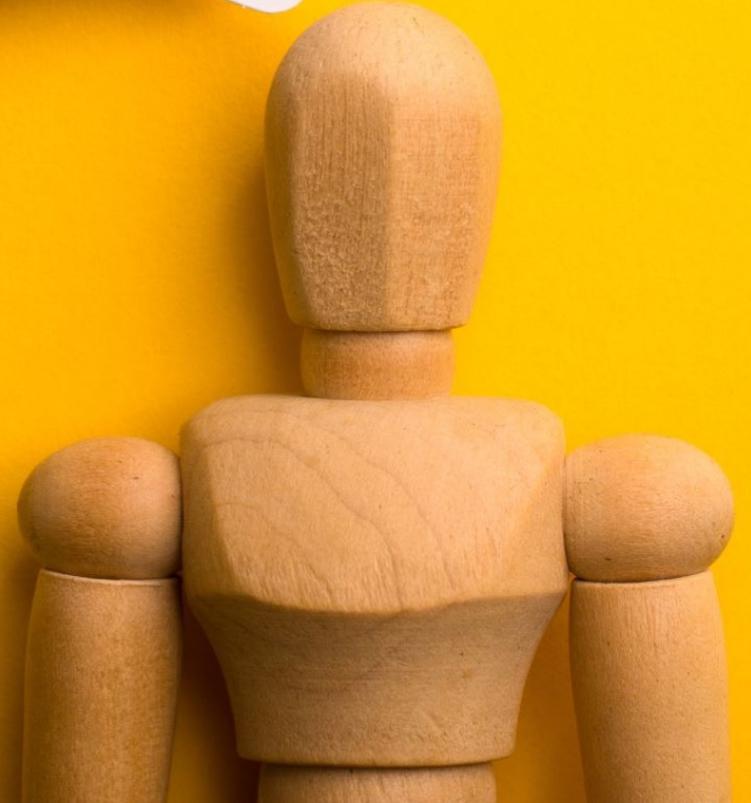
Your Guides:
Eric Chan and Stewart Kasen

Agenda

- What is Apptio BI?
- History of Apptio BI
- Publishing Data to Apptio BI
- Visualization Fundamentals
 - Data Source, Dimensions, Metrics, and Date Range'
 - Visualization Choices
 - The Drill Table
- Example Use Cases

Quick Poll

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



What is Apptio BI?

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'. A table lists the 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 Apptio BI](#)



[Apptio BI
Community Page](#)



[Apptio BI
Learning Plan](#)

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?



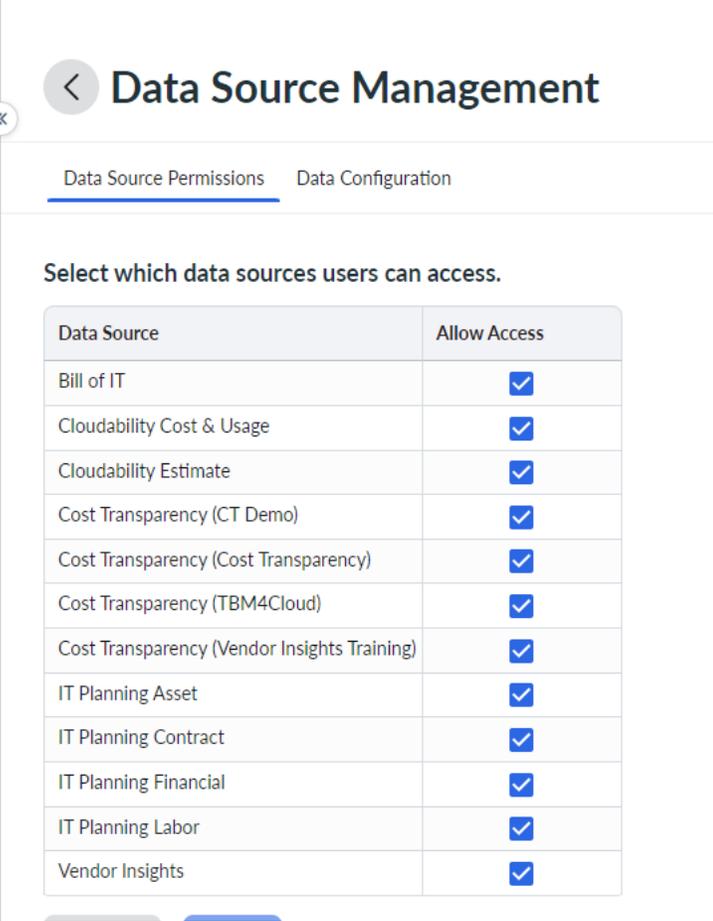
Implementation Best Practices

- Manage expectations of the tool
- Limit access to dimensions and metrics
- Engage with end users and provide process for feedback



Available Data Sources

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

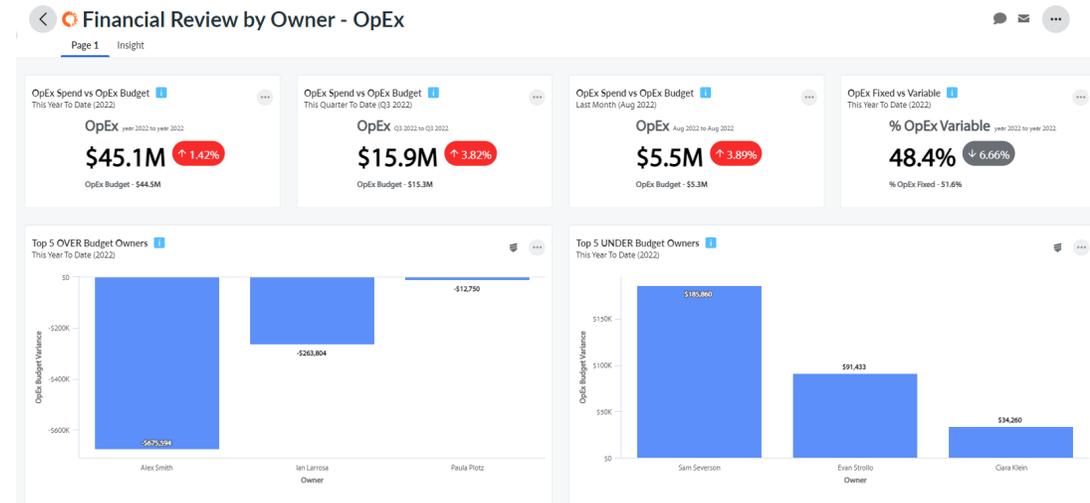


The screenshot shows the 'Data Source Management' interface. At the top, there is a back arrow and the title 'Data Source Management'. Below the title, there are two tabs: 'Data Source Permissions' (which is selected and underlined) and 'Data Configuration'. The main content area contains the instruction '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"/>

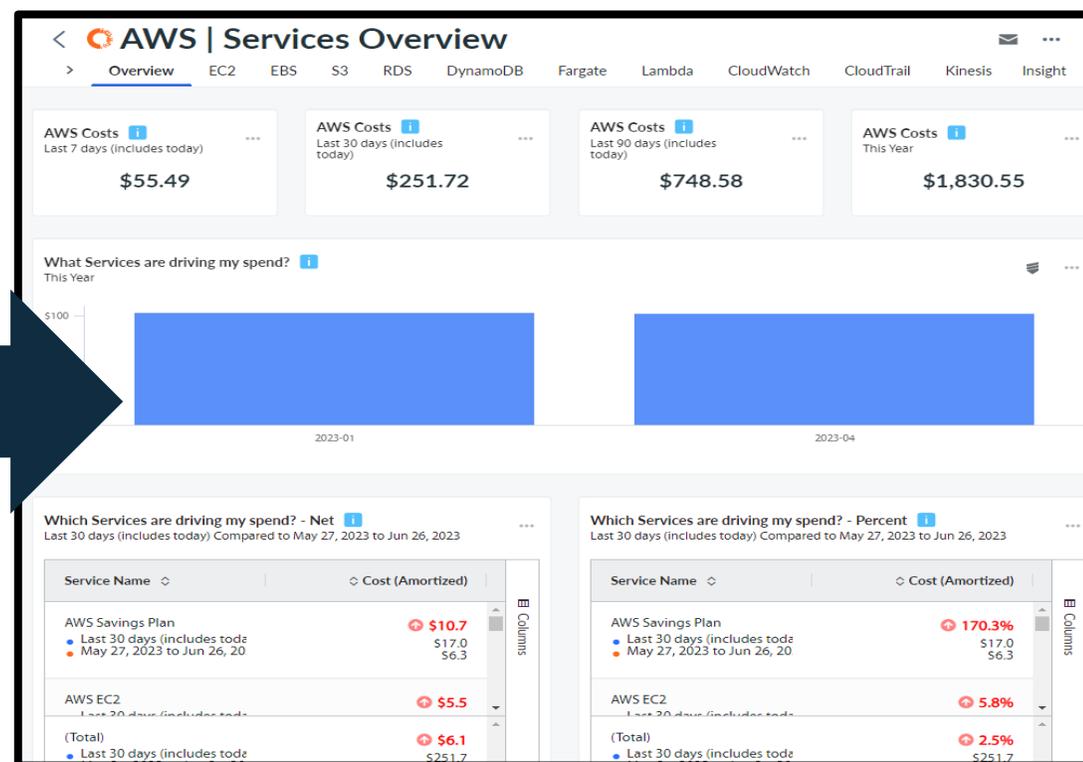
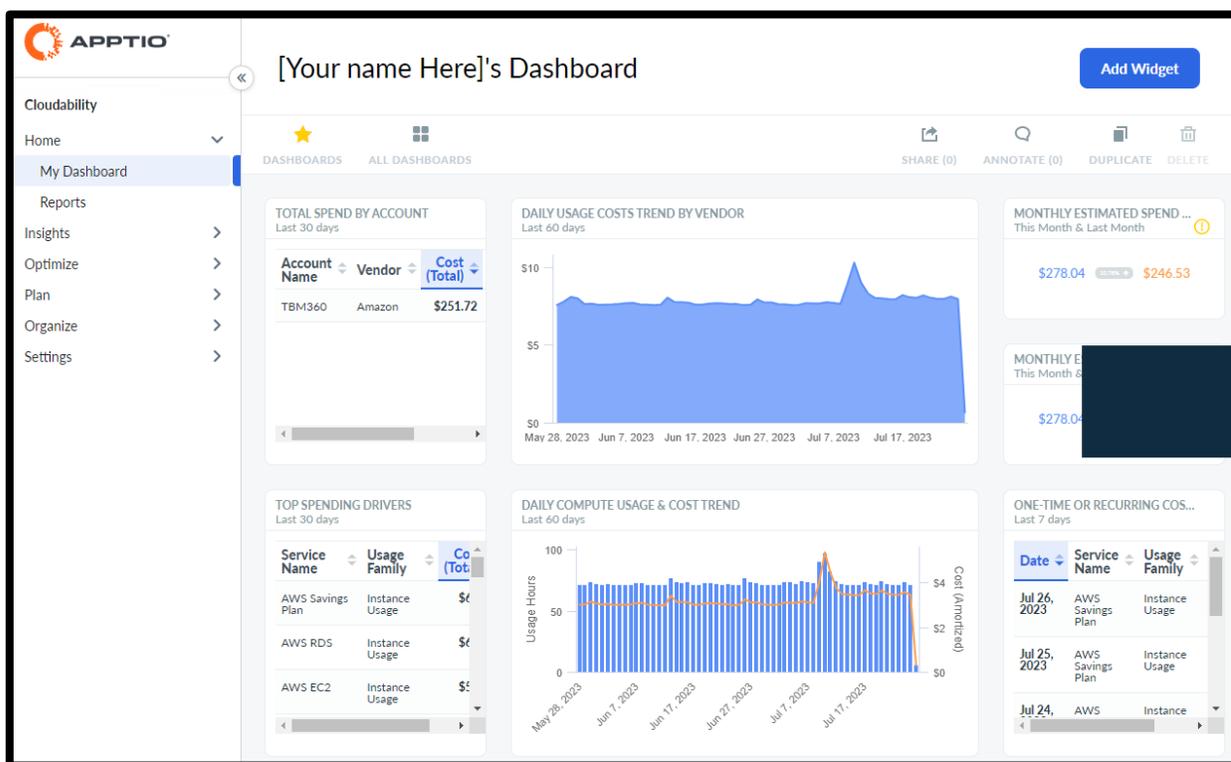
Use Cases

- Keep users within Apptio
- Organizational Dashboards
- Personal Reporting
- Report Subscriptions and PDF
- Ad Hoc Reporting
- Row Level Security Reporting
- Insight Notifications



History of Apptio BI

Cloudability Dashboards -> Self Service Reporting -> Apptio BI



Hands on Demo

Hands On Demo

- *The following slides are a step-by-step guide on how to make a visualization, however, for the live demo we did not use these slides*

Choose a Data Source

- After clicking the “Add New Visualization” button, the first step is to choose the data source for your visualization

Add Visualization to Report

Data Options

All fields are required unless indicated as optional.

Data Source and Measures

- Bill of IT
- Cloudability Cost & Usage
- Cloudability Estimate
- Cost Transparency (Cost Transparency)
- Cost Transparency (CT Demo)
- Cost Transparency (ET Webinar Demo)
- Cost Transparency (Sandbox Company)
- Cost Transparency (TBM4Cloud)
- Cost Transparency (Vendor Insights Training)
- IT Planning Asset
- IT Planning Contract
- IT Planning Financial
- IT Planning Labor
- Vendor Insights

Choose a Date Range

- Scroll to the bottom of the left-hand pane and select a date range for the visualization

Data Options

Sort

MEASURE

Ascending

Descending

Date Range

Select a date range, optional granularity, and comparison period.

Select a date range

Currency

Viewer's preferred currency

Filters

Apply a filter to constrain your data.

+ Add Filter

Custom Date Range

Specify a fixed or rolling date range and whether this is a to-date range.

Date Range Compare Rolling

Start Date -- End Date

Start Date -- End Date

< May 2023 June 2023 July 2023 >

Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6					1	2	3							1
7	8	9	10	11	12	13	4	5	6	7	8	9	10	2	3	4	5	6	7	8
14	15	16	17	18	19	20	11	12	13	14	15	16	17	9	10	11	12	13	14	15
21	22	23	24	25	26	27	18	19	20	21	22	23	24	16	17	18	19	20	21	22
28	29	30	31				25	26	27	28	29	30		23	24	25	26	27	28	29
														30	31					

Cancel Save

Choose Dimensions and Metrics

- These are the data points that you want to display in the visualization
- Dimension = Buckets
- Metric = Totals

Dimensions

A dimension is an attribute of your data set that describes the data.

Vendor ×

+ Add Dimensions

Alternative Dimensions

Metrics

A metric is a measurable, quantitative value that can be operated upon.

Cost (Amortized) ×

+ Add Metrics

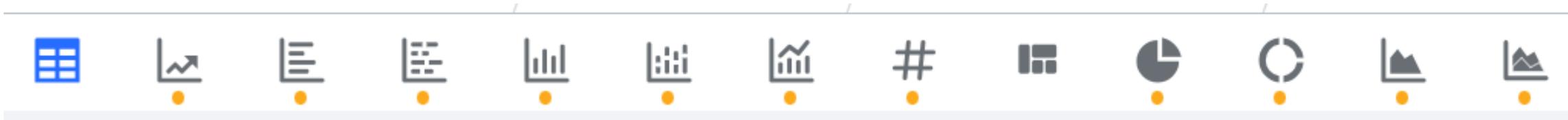
Alternative Metrics

Set Results

- This is how many items will appear in the visualization. This is a maximum limit
- For graphs, tables, etc. make sure this number is high enough to display everything properly



Choose a Visualization Style



Blue = Visualization Currently Selected

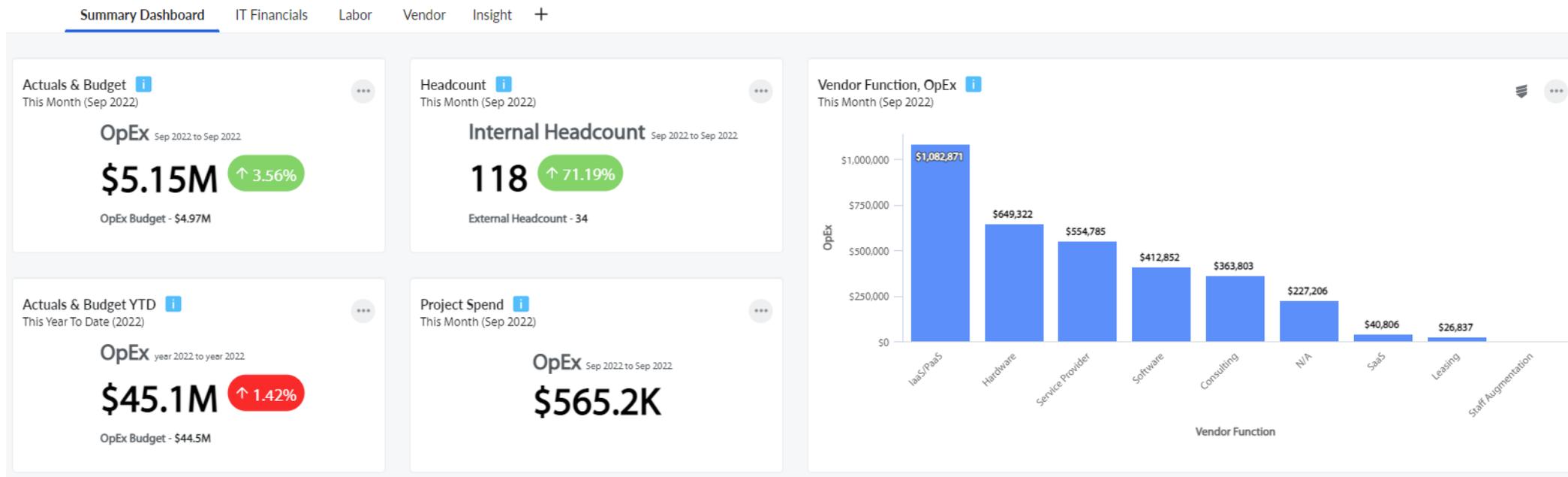
Yellow Dots = Available per Metrics and Dimensions Chosen

No Yellow Dot = Not Available with current choices

Important 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

Discussion

- How are end users notified of what you have within Apptio?



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
- Reports can be assigned to multiple Report Collections

Apptio BI

View, edit, and manage reports.

The image displays two screenshots of the Apptio BI interface, illustrating report collections. Both screenshots show a search bar labeled 'Search Reports' and a 'Manage Collections' dropdown menu. The top screenshot shows the dropdown menu with options: Financial Org, Engineering Org, Product Org, and Marketing Org. The bottom screenshot shows the dropdown menu with options: Financial Reports, Labor Reports, Project Reports, and Vendor Reports. Both screenshots also show a 'Cloudability Executive View - Cl...' report card and a 'Financial Review b...' report card.

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

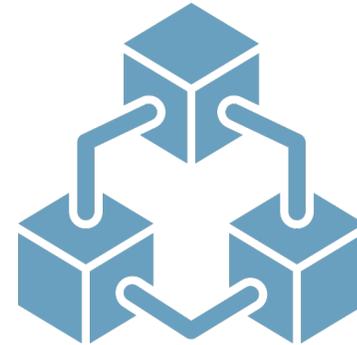
★	Name	Owner	Created	Modified	
	<input type="text"/>	<input type="text"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="mm/dd/yyyy"/>	
☆	Account Drilldown Report	MINE	4/13/22, 6:59 PM	7/28/22, 6:44 AM	⋮
☆	Alex Smith Monthly Dashboard	MINE	4/13/22, 9:17 PM	7/28/22, 7:48 AM	<ul style="list-style-type: none"> Set as home report Share Duplicate Reassign Ownership Delete
☆	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	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	

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

Example Use Cases

- Cloudability Total Cost
- Apptio One Reporting when there are High Calc Times
- Dashboards for Executives



Questions?



Surveys

Please take a few moments to fill out the class survey.
Your feedback is extremely important for future events.



Thank You For Attending Rego University

Instructions for PMI credits

- Access your account at 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.



Phone

888.813.0444



Email

info@regoconsulting.com



Website

www.regouniversity.com