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SAN DIEGO • 2023

Apptio IT Planning Best Practices

Your Guides:

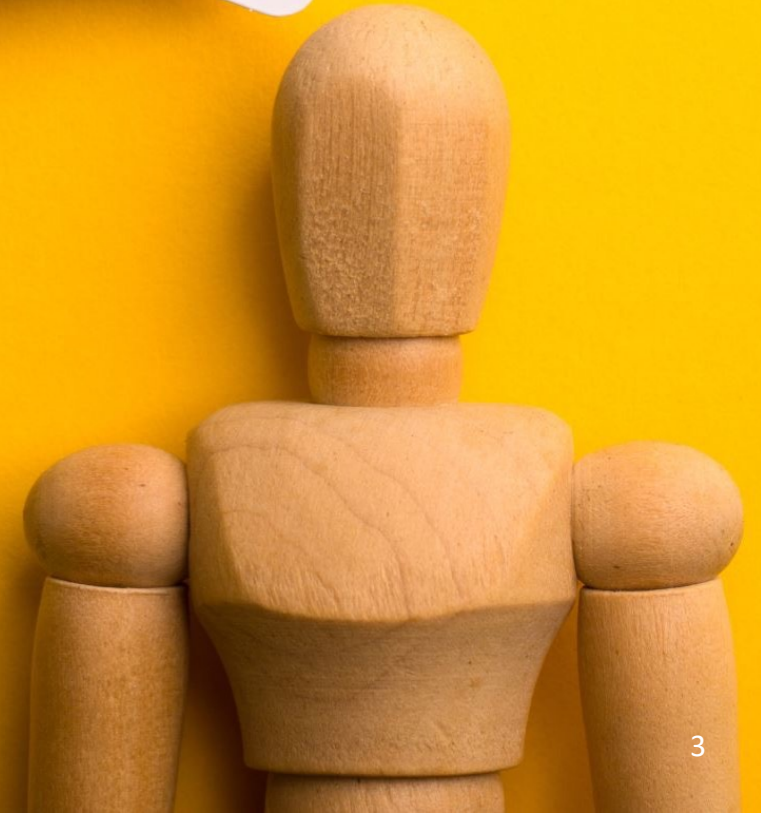
Eric Chan and Rob DeLeo

Introductions

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

Quick Poll

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



Agenda

- 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

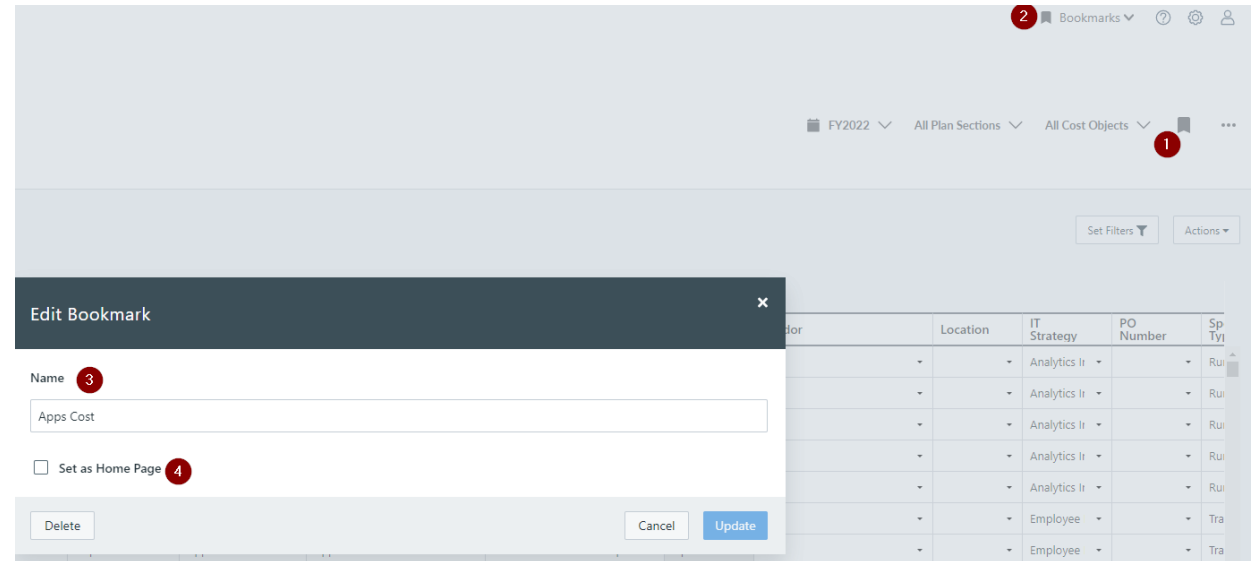
- Allows you to set users up with layouts specific to them
- Makes the use of ITP Clearer and more straight forward
- Streamlines the planning and forecasting process
- Make layouts Public or Private
- Can hold on to filters

The screenshot shows the 'Expenses' section of the Inditex system. At the top, there are summary boxes for 'OPEX TOTAL: FY2022' and 'CAPEX TOTAL: FY2022', both showing '\$0'. Below these are tabs for 'Summary', 'Labor', 'Contracts', 'Assets', and 'Other'. A table of expenses is displayed with columns for 'Cost Object Type', 'Cost Object', 'Cost Center', 'Account', 'Account Expense', 'Vendor', 'Location', 'IT Strategy', 'PO Number', 'Spend Type', and 'Contract ID'. A custom layout overlay is visible on the left side of the table, with a 'Layout' dropdown menu. The menu is open, showing 'Default Layout' selected, and options for 'Save As...' and 'Manage Layouts...'. Red boxes and numbers 1-4 highlight these elements: 1 points to the 'Layout' dropdown, 2 points to the table header, 3 points to the 'Save As...' option, and 4 points to the 'Manage Layouts...' option.

Cost Object Type	Cost Object	Cost Center	Account	Account Expense	Vendor	Location	IT Strategy	PO Number	Spend Type	Contract ID	P	IT
Department	Apps - Back Office	Apps - Back Office	Meals & Entertainment	OpEx			Analytics II		Run			Bl
Department	Apps - Back Office	Apps - Back Office	Moving Allowances	OpEx			Analytics II		Run			Bl
Department	Apps - Back Office	Apps - Back Office	Professional Memberships	OpEx			Analytics II		Run			Bl
Department	Apps - Back Office	Apps - Back Office	Travel Expense - Other	OpEx			Analytics II		Run			Bl
Department	Apps - Back Office	Apps - Back Office	Travel Expense - Other	OpEx			Analytics II		Run			Bl
Department	Apps - Back Office	Apps - Back Office	Other Admin Support	OpEx			Employee		Transform			
Department	Apps - Back Office	Apps - Back Office	Professional Memberships	OpEx			Employee		Transform			
Department	Apps - Back Office	Apps - Back Office	Professional Memberships	OpEx			Employee		Transform			
Department	Apps - Back Office	Apps - Back Office	Employee Training & Develc	OpEx			Legacy Mc		Transform			
Department	Apps - Back Office	Apps - Back Office	Travel Expense - Other	OpEx			Risk & Sec		Transform			
Department	Apps - Back Office	Apps - Back Office	Employee Training & Develc	OpEx			Streamline		Transform			
Department	Apps - Line of Bus	Apps - Line of Business	Employee Training & Develc	OpEx			Employee		Grow			S

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
1	ama			Department	Apps - Back Office	Apps - Back Office	Meals & Entertainment	OpEx 2
	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							

Line-Item Filters / Dependent Drop Downs

- Restrict options based on a value already entered.
- Dimension can be filtered down by another Dimension or List.

Configuration

- Reference Data
- Schema
- Custom Lists
- Line Item Filters**
- Line Item Code Prefix
- Cost Object Permissions
- Labor Allocation Rules
- Score
- Calendar Setup

Add Line Item Filter

Name*
Demo Filter

Column* ✕ ▲

- Account
- Asset Class
- Contract Type
- Demo
- Location
- Role
- Test
- Vendor

Asset Class (Dimension)
Benefit Category (List)
Business Initiative (List)
Business Sponsor (List)
Contract Type (Dimension)
Cost Center (Dimension)
Demo (Dimension)
Department (Dimension)
Department Owner (List)
IT Project Owner (List)
Invest Type (List)

Filter By* ✕ ▲

Cancel Add

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	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"/>

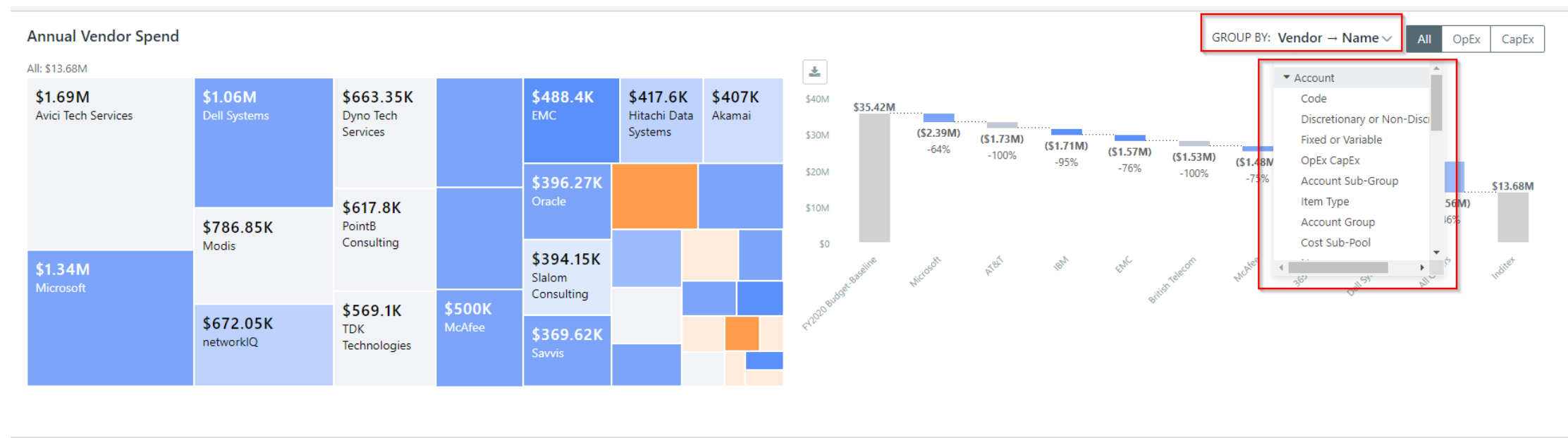
Discussion

- How are you managing your cost object permissions today?



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
 Planning
 Dashboard
 Summary
 Variance Analysis
 Expenses
 Ledger
 Status
 Targets
 Plans
 Spend Management
 Change History
 Configuration

Forecast v2

CAPEX TOTAL: FY2021
 \$49.37M TARGET: \$3.46M VARIANCE: -100%
\$0

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

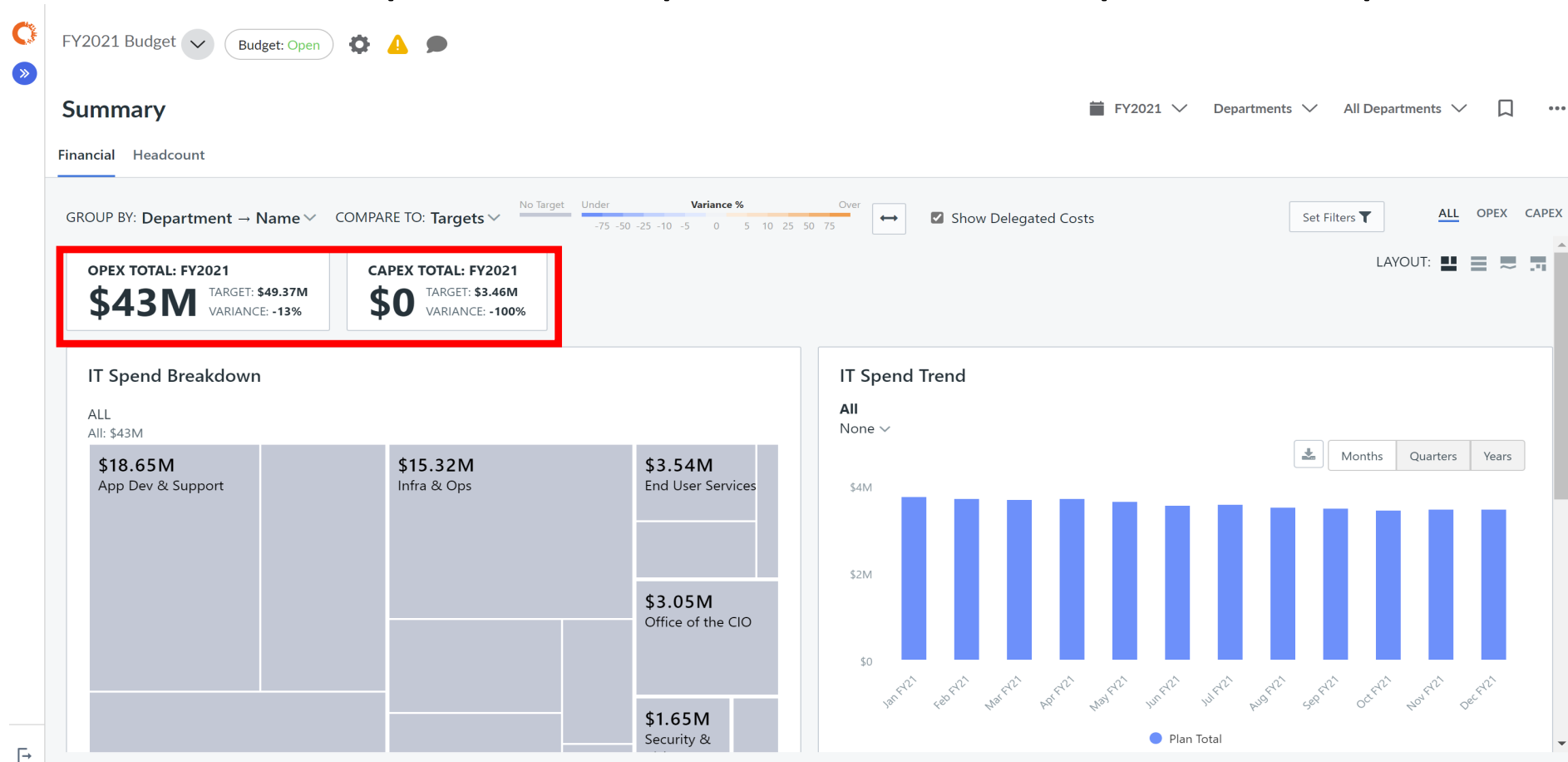
All Departments Target: FY2021
\$49.37M
 Plan \$44.34M
 Remainder \$0

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

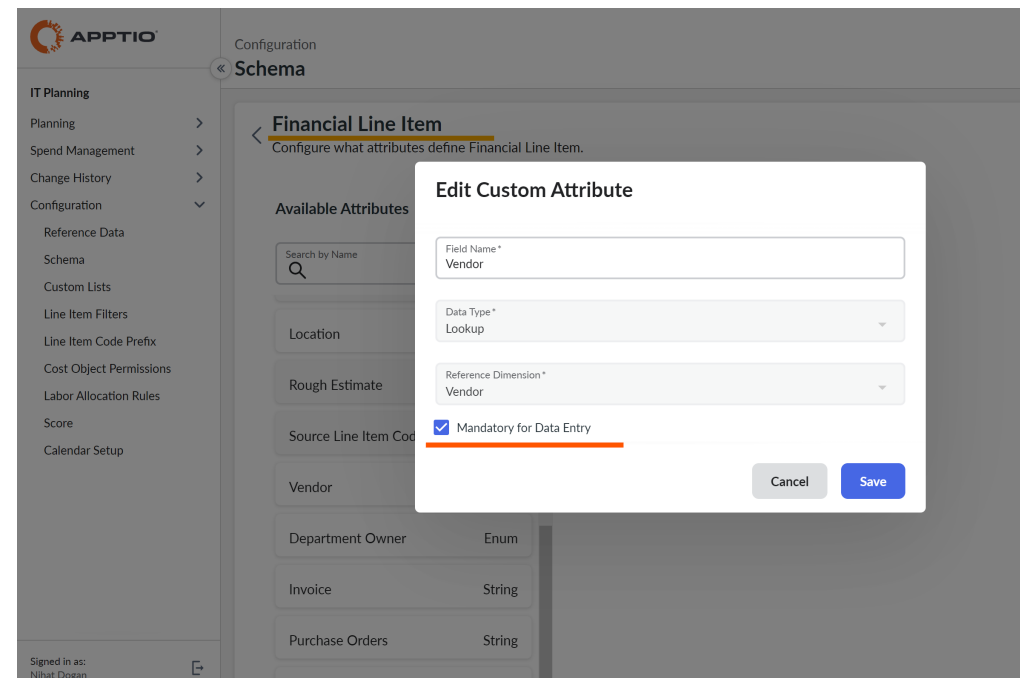
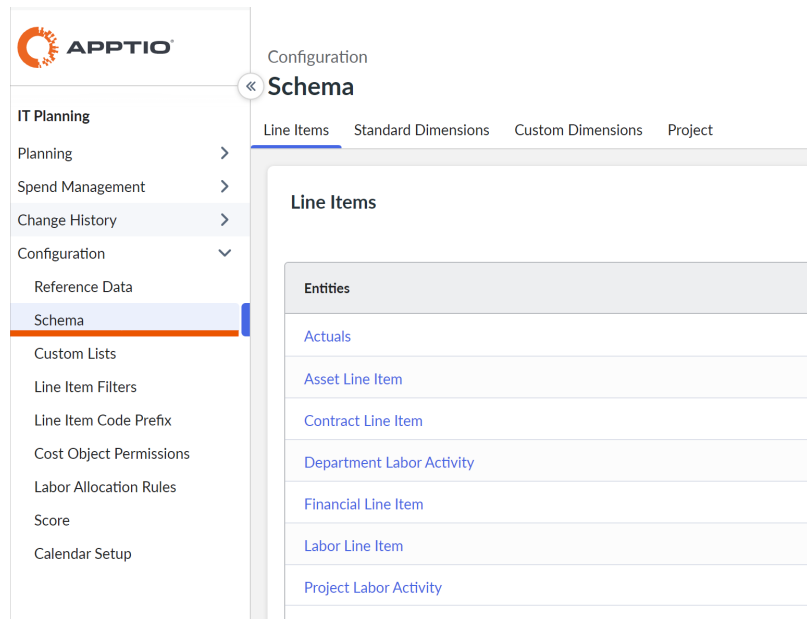
Event types in Change History

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



Discussion

- What's your strategy on managing Active and Archived plans to manage your IT Planning environment performance?



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 it to the 'Manage Compare Shortcuts' dialog.

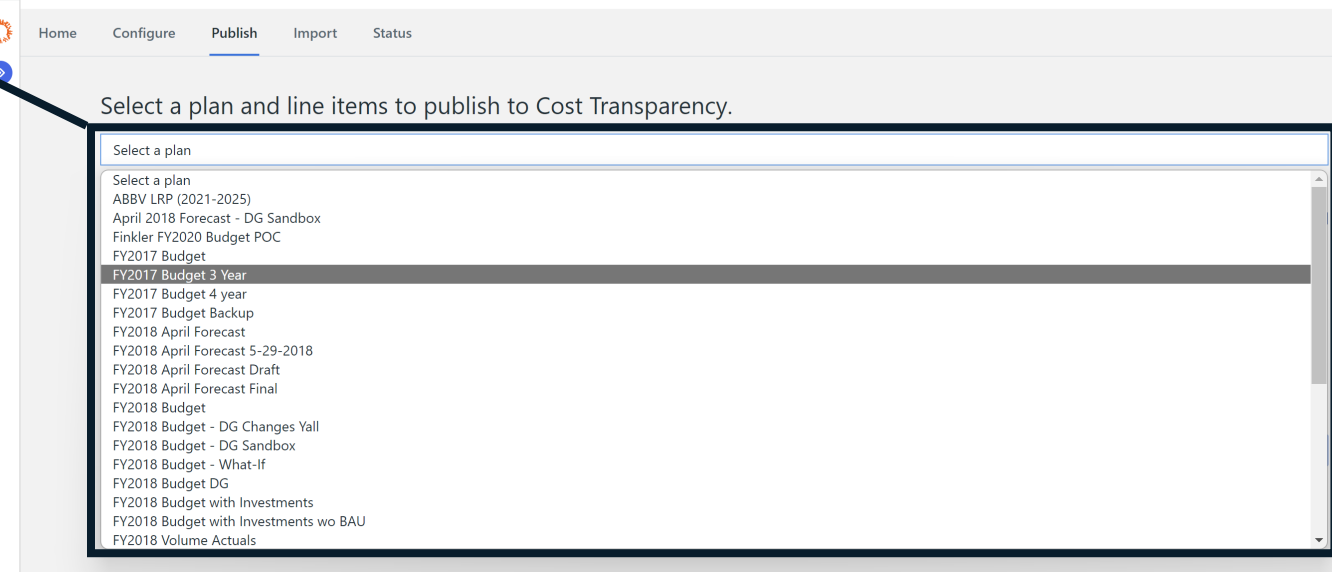
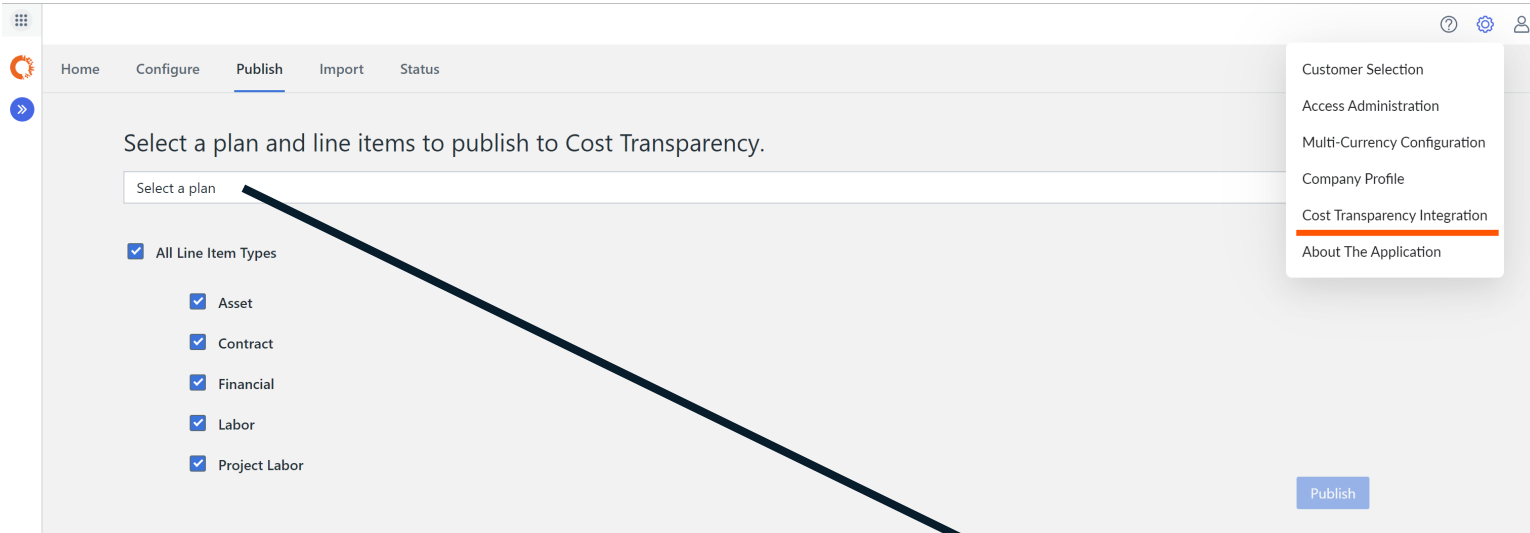
Name
FY2019 Budget v2
FY2019 July Forecast
FY2019 July Forecast v2
FY2020 Budget
FY2020 January Forecast
FY2021 Budget

The screenshot shows the 'FY2021 Budget' dashboard. At the top, it says 'Budget: Open' with a warning icon. The main section is titled 'Dashboard' and shows 'COMPARE TO: FY2019 July Forecast v2'. 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 dropdown to the 'Manage Compare Shortcuts' dialog.

The screenshot shows the 'Add Visualization to Report' dialog. It has tabs for 'Data' and 'Options'. Under 'Data', 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.

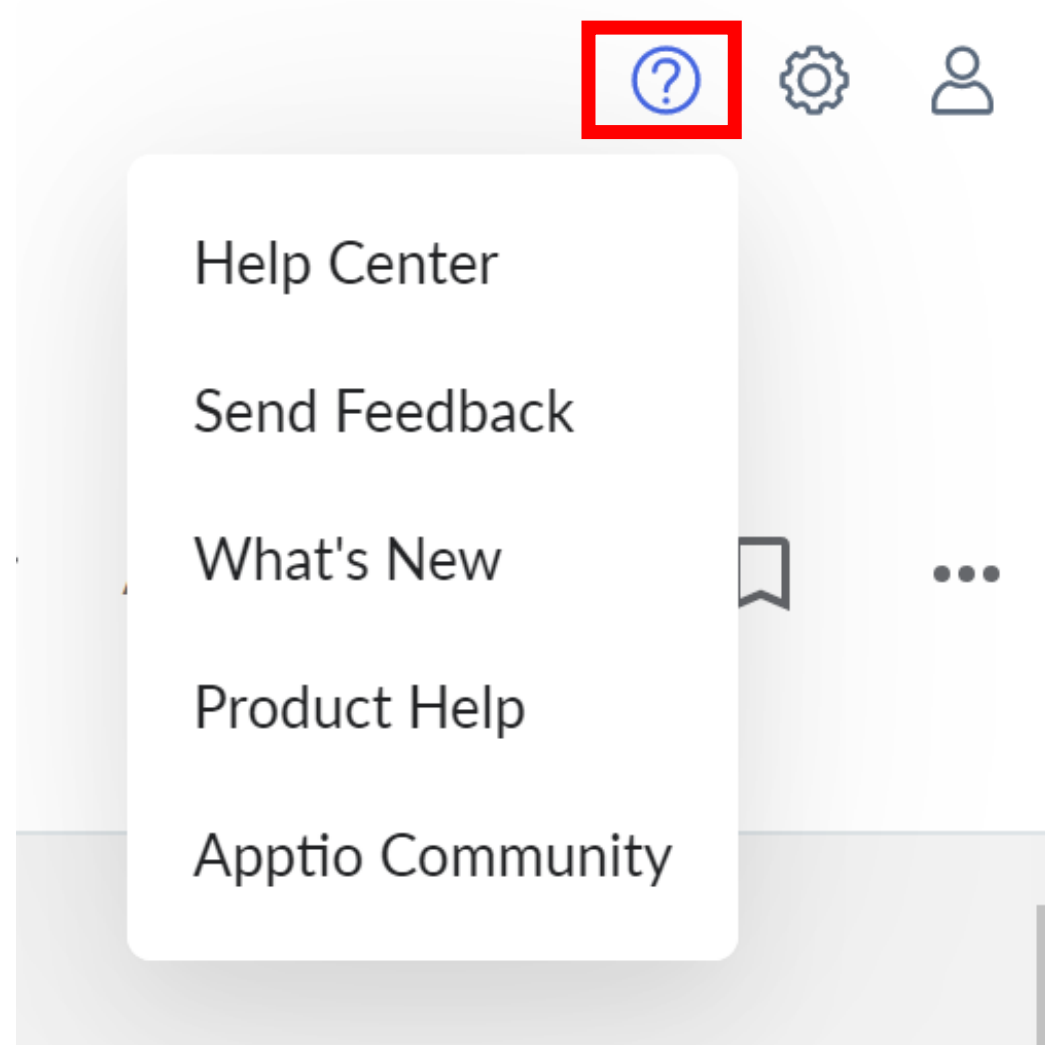
The screenshot shows the 'Manage Compare Shortcuts' dialog. It has a section 'Compare Current Plan to' with a dropdown menu set to 'Please select a comparison'. A red box highlights this dropdown menu, and a red arrow points from it to the 'Add Visualization to Report' dialog. The dialog also has an 'Alignment Method' section with several rows of 'Select value' dropdowns and 'Show by default' checkboxes.

Managing Archive



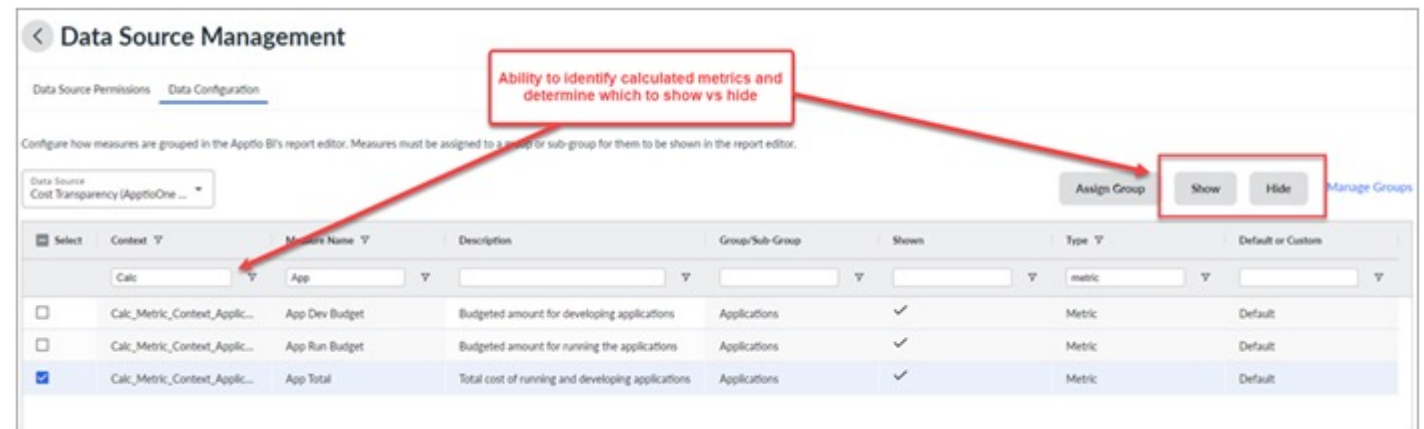
Stay On Top of Product Updates

- 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?

- 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?



Surveys

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



Thank You For Attending regoUniversity

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.



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