regoUniversity
SAN DIEGO · 2023
Sponsored by
APPTIO
Apptio Reporting Best Practices & Report Showcase
Your Guides:
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Introductions

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

Agenda

- Introduction
- Reporting Options for Apptio
- Reporting Tips & Tricks
- Reporting best practices
- Custom Report Showcase

Discussion

- What are your biggest concerns when it comes to reporting in your organization?
- Is there more than one source for the same information?
- Do your users utilize the reports available?

Apptio Reporting Options

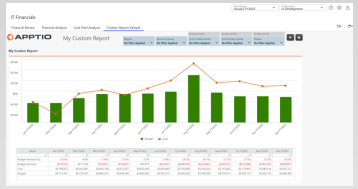
Apptio Reporting Options

Out of the Box Report

- ITP/PFP Dashboard vs CT Report
- ITP / PFP reports/dashboards
- Design cannot be customized

- BVA, plan comparison reports
- User-specific changes – group by, filters, comparisons, etc

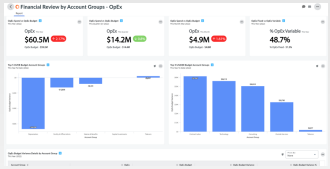
Custom Studio Report



- Created from scratch or modified OOTB
- Data available from CT application (i.e. TBM Studio)
- Requires admin privileges to build

- Allows more advanced formatting and reporting capabilities
- Report access can be configured as well
- Requires calculation and promotion to production environment

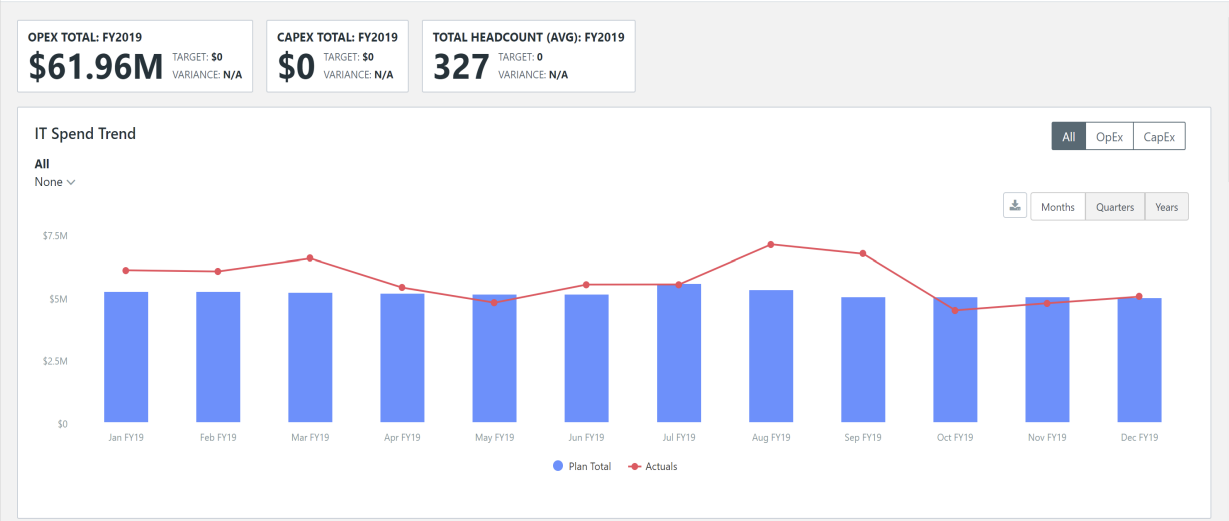
Self-Service Report

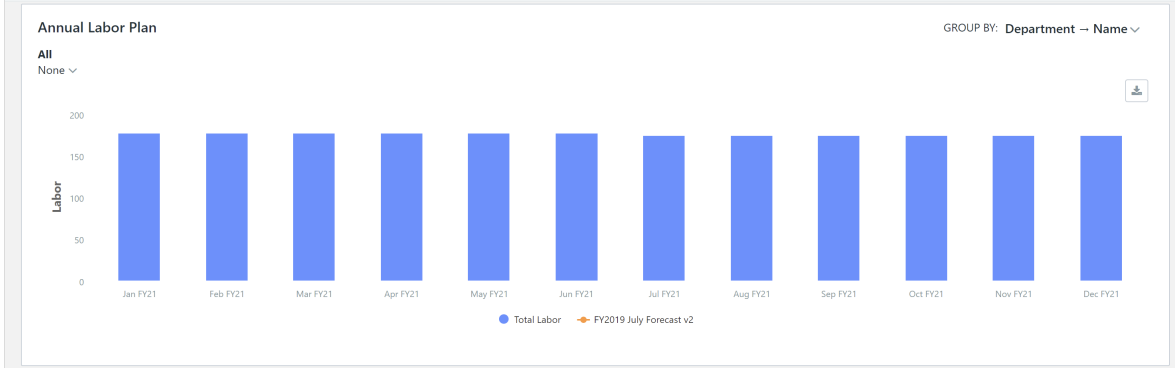


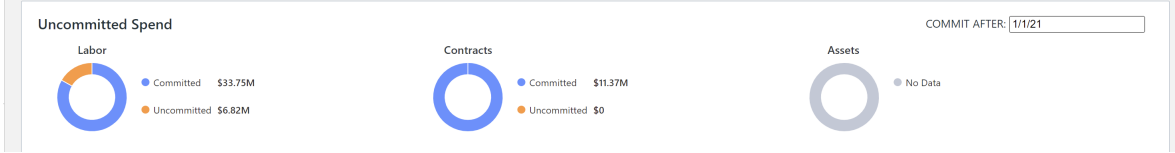
- TBMAs and End Users can build reports
- Reports can be personal or shared with selected users and user categories

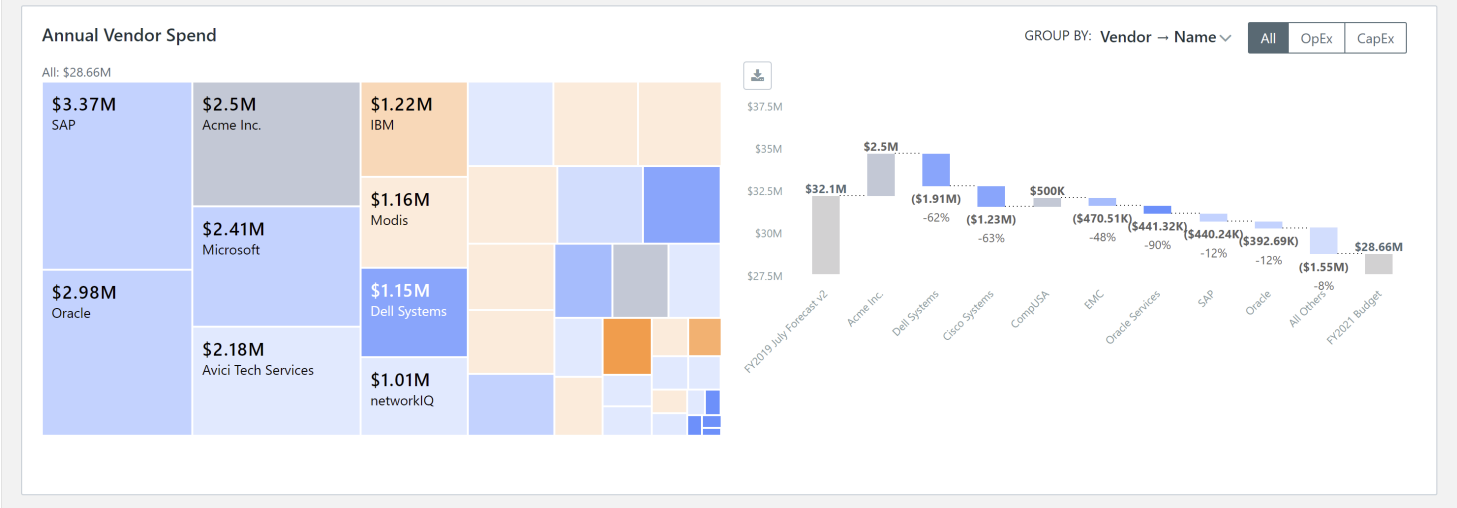
- Data content available for these reports are configured by Admins
- Data available from ITP, CT, Cloudability applications

OOTB Report Example – ITP Dashboard

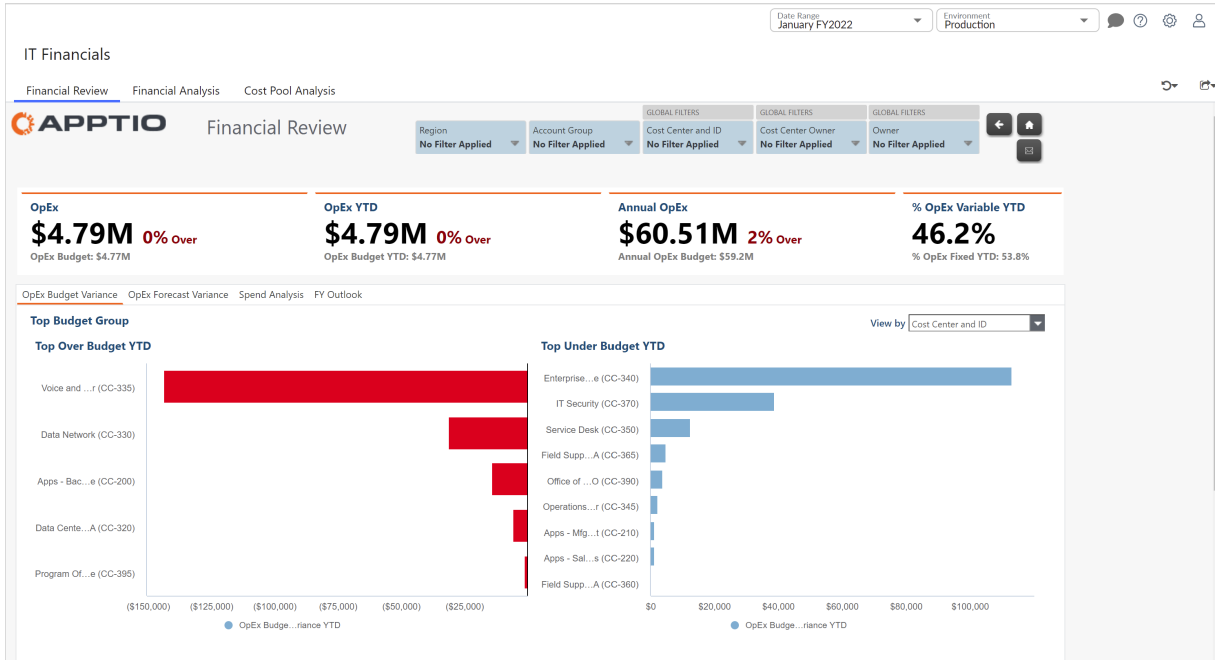


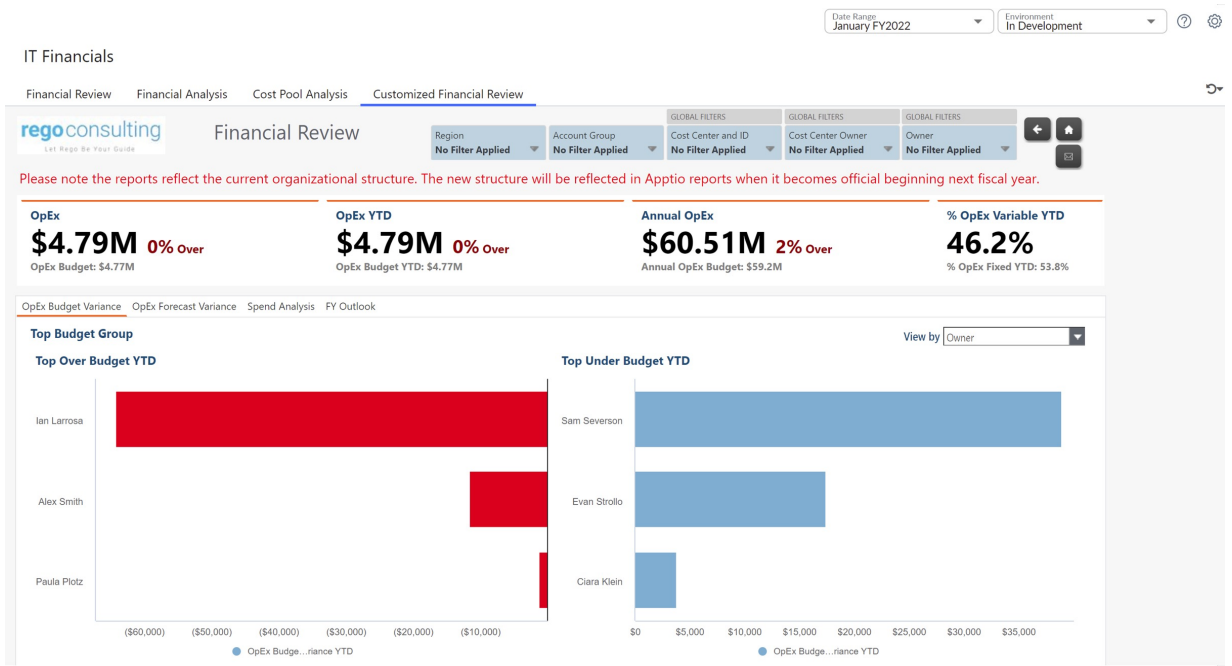




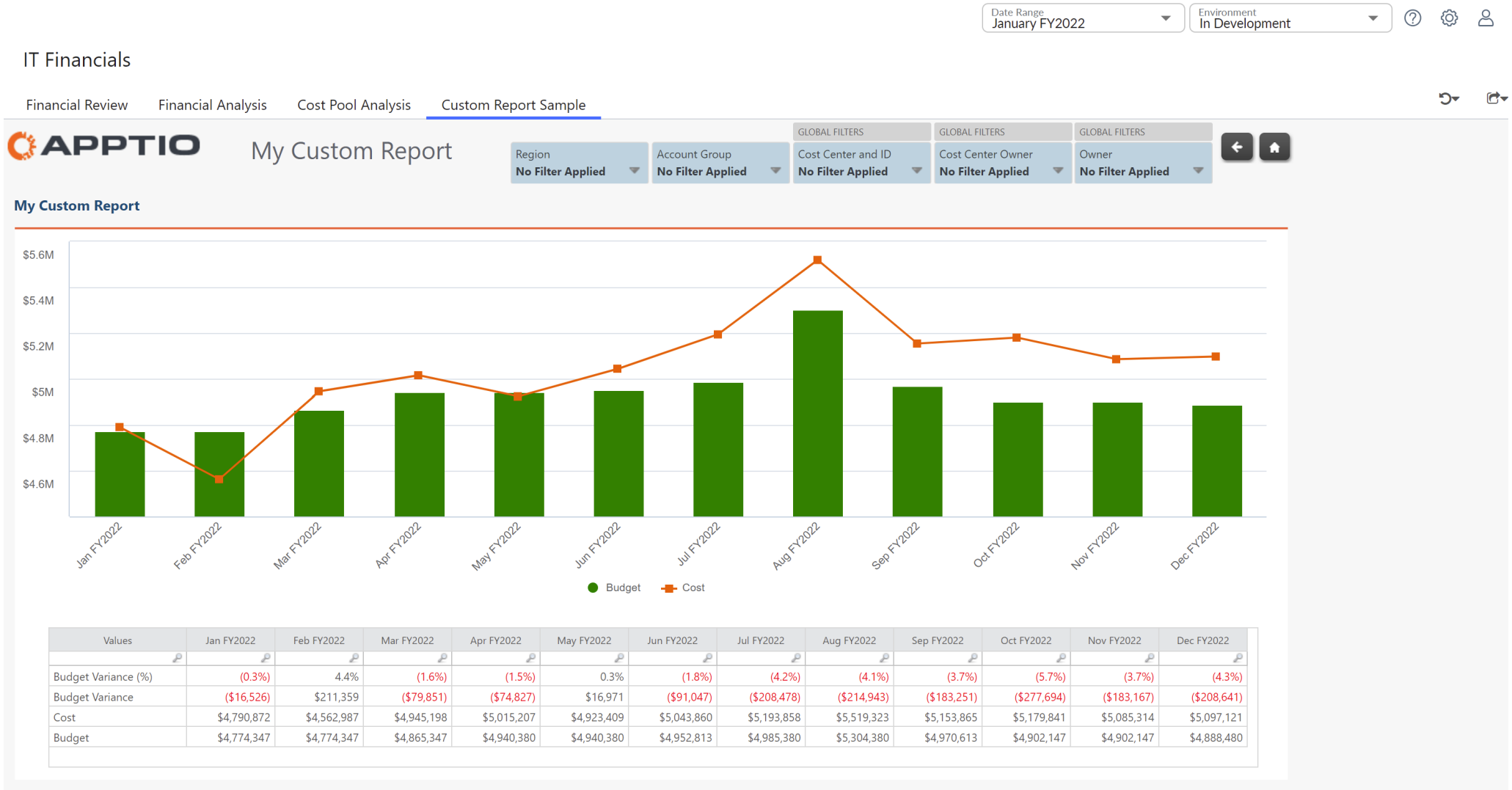


Customizable OOTB Report Example – Cost Transparency





Custom Report Example – Cost Transparency



Values	Jan FY2022	Feb FY2022	Mar FY2022	Apr FY2022	May FY2022	Jun FY2022	Jul FY2022	Aug FY2022	Sep FY2022	Oct FY2022	Nov FY2022	Dec FY2022
Budget Variance (%)	(0.3%)	4.4%	(1.6%)	(1.5%)	0.3%	(1.8%)	(4.2%)	(4.1%)	(3.7%)	(5.7%)	(3.7%)	(4.3%)
Budget Variance	($16,526)	$211,359	($79,851)	($74,827)	$16,971	($91,047)	($208,478)	($214,943)	($183,251)	($277,694)	($183,167)	($208,641)
Cost	$4,790,872	$4,562,987	$4,945,198	$5,015,207	$4,923,409	$5,043,860	$5,193,858	$5,519,323	$5,153,865	$5,179,841	$5,085,314	$5,097,121
Budget	$4,774,347	$4,774,347	$4,865,347	$4,940,380	$4,940,380	$4,952,813	$4,985,380	$5,304,380	$4,970,613	$4,902,147	$4,902,147	$4,888,480

Self Service Report – Apptio BI

Financial Review by Account Groups - OpEx

Report

OpEx Spend vs OpEx Budget
This Year (2022)

OpEx This Year
$60.5M ↑ 2.17%
OpEx Budget - $59.2M

OpEx Spend vs OpEx Budget
This Quarter (Q1 2022)

OpEx This Quarter
$14.2M ↓ 0.8%
OpEx Budget - $14.4M

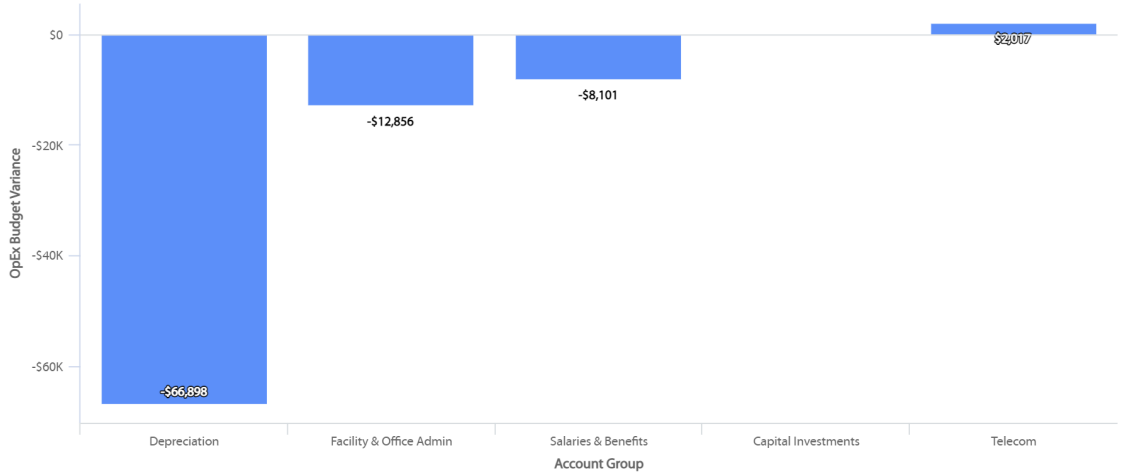
OpEx Spend vs OpEx Budget
This Month (Mar 2022)

OpEx This Month
$4.9M ↑ 1.61%
OpEx Budget - $4.8M

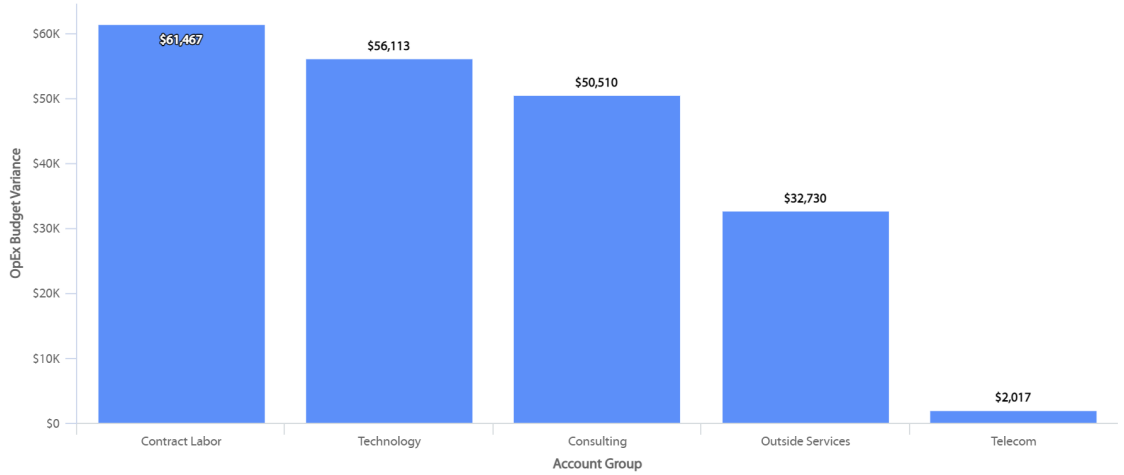
OpEx Fixed vs OpEx Variable
This Year (2022)

% OpEx Variable This Year
48.7%
% OpEx Fixed - 51.3%

Top 5 OVER Budget Account Groups
This Year To Date (2022)



Top 5 UNDER Budget Account Groups
This Year To Date (2022)



OpEx Budget Variance Details by Account Group
This Year (2022)

Pivot By
None

Account Group	OpEx	OpEx Budget	OpEx Budget Variance	OpEx Budget Variance %

External BI Tools

- Many organizations have an enterprise BI tool within their reporting landscape, and it is important to establish how Apptio fits into the reporting solution.

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Send your stakeholders the relevant information they want from Apptio using tailored **email** templates

Step 1

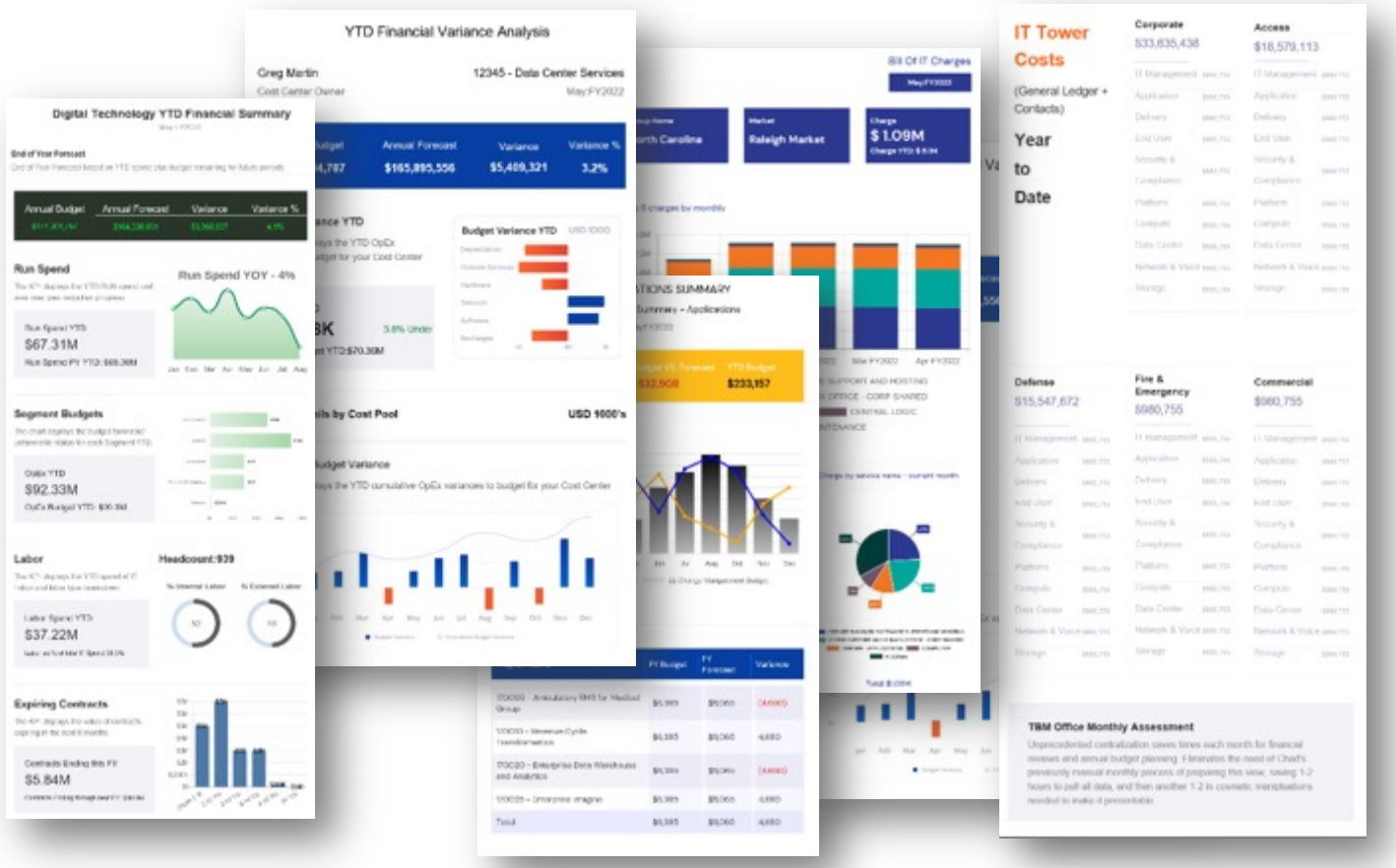
Create a new report, or choose one from our library of templates to tailor

Step 2

Select groups of users to receive emails with data based on their roles

Step 3

Schedule reports for recurring and automated email delivery



Reporting Tips & Tricks

Reporting Tips & Tricks (LIVE DEMO)

1. Use Value Field Settings to easily add comparison columns for a metric
2. Swap a chart view between table and chart
3. Color Palette Tricks
    1. Using generic 1, 2, 3 for chart color palette
    2. Use generic text references such as Biggest=Blank; Second=GREEN
4. Use the "Context Menu" option to enable a quick export button for a report table
5. Export a report table by right clicking on the scroll bar (since export toolbar button always exports all tables/tabs on a report)

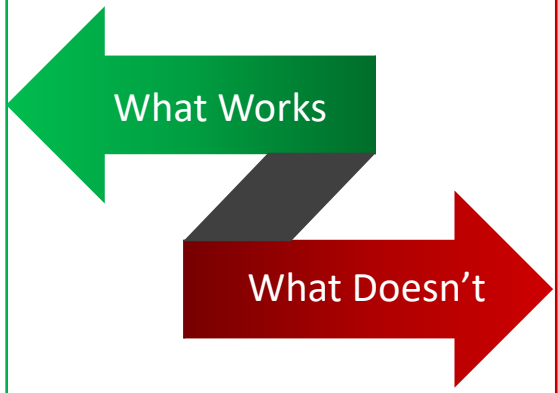
Reporting Strategy Best Practices

Discussion

- What is your primary reporting mechanism? (Out of the Box, Studio Reports, Self-Service Reporting)
- How do executives want to consume reports? (Web, Email, Mobile)
- Are there other reporting options you should consider?

Best Practices

- With any report, identify the top question(s) that the report should answer
- Use the right report technology for the job (Studio, Self-Service, Enterprise, etc..)
- Converting excel reports that are already operationalized and moving them into the tool can gain big benefits
- Automation of report delivery
- Having leadership adopt the tool and utilize the tool's dashboards (eventually moving away from "receiving" dashboards to "using" dashboards)
- Ensure that the reports are designed for ‘Easy Reading’
- Ensure the definition of data is uniform for all reports



- Having people go into the tool to pull out extracts and fish for the data
- Developing reports that have too many data columns, which can cause the report to lose its purpose
- Having scenarios where the user is taking a report from the system, copying and pasting parts of it into a ppt/excel, and generating another report outside of the tool
- Creating different versions of the same report for different business units. This should be handled with thoughtful filters
- Creating reports with data that is inconsistent with other systems, and not having a clear understanding of ownership of data

Custom Report Examples

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Discussion

- Have you use custom reports in your organization?
- Do you have any you're willing to share?

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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