



regoUniversity

SAN DIEGO • 2023

Data Visibility and Access Controls in ApptioOne

Your Guides:

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Introductions

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

Agenda

- Standard Roles vs Custom Roles
- Application Permissioning
- Report Permissioning
- Report Collection Permissioning
- Report Component Permissioning
- Row level security
- ITP Cost Object Permissioning
- ITP Tab Permissioning

Discussion

- Does anyone have a current Access or Security concerns around Apptio in your Organization?



Apptio Roles



Standard Roles vs Custom Roles

- Standard Roles
 - Out of box set by Apptio.
 - Unable to edit the permissions of Standard Roles.

The screenshot displays the 'Roles' page in the Access Administration tool. The interface includes a navigation bar with 'Users', 'Environment Access', 'Roles', 'Applications', and 'Reports'. The 'Roles' section is active, showing filters for Customer (regoconsultingpartner.com), Environment (sandbox), and Applications (Apptio BI). A search bar and filter options (Role Type: 2, Application Type: 10) are present. Below is a table of roles:

Role	Type	Application Types	Description	Actions
Admin	Standard	Cost Transparency, Cloudability, Show +7 more	Applies to Cost Transparency, Datalink, Interactive Benchmarking, IT Planning, TBM Studio and Cloud Cost Optimization. Can perform all available actions in the applications. There are no restrictions.	View Grant Clone
AIS BM	Standard	Cost Transparency	Provides access to Benchmark Explorer	View Grant Clone
Analyst	Standard	Cost Transparency	Can view reports and create personal reports.	View Grant Clone
BasicAgileUser	Standard	Cost Transparency, IT Planning	Basic Agile User	View Grant Clone
Budget Process Owner	Standard	Cost Transparency, IT Planning, Show +1 more	Can create, open, review, and close plans.	View Grant Clone
Budgeting Process Owner	Standard	Cost Transparency, DataLink, Show +1 more	Used with the original IT Planning application, not IT Planning Foundation. Can configure the application and track and approve budgets as they pass through the budgeting process.	View Grant Clone
Business Consumer	Standard	Cost Transparency	A special case of Business User that has access to Bill of IT Business User reports	View Grant Clone
Business Owner	Standard	Cost Transparency, IT Planning	Can manage the workflow in the Bill of IT application.	View Grant Clone
Business Unit Owner	Standard	Cost Transparency	Used with the original IT Planning application, not IT Planning Foundation. Can specify the demand for IT services for a business unit.	View Grant Clone
Business User	Standard	Cost Transparency	Can view reports available to all users.	View Grant Clone

Standard Roles vs Custom Roles (cont.)

- Create Custom Roles
 - Clone an Out of Box roles for a starting point and edit the permissions.
 - These roles can be used for visibility settings.

Access Administration Rob DeLeo

Users Environment Access **Roles** Applications Reports

Role: Clone Role

Customer: iot.in.gov
Environment: main
Applications: Apptio BI [Show +11 more](#)

Customize Permissions Confirm

Type: Custom

Name:

Description:

Search Permissions Filter by:

Permission	Application Types	Description
<input checked="" type="checkbox"/> AccessProd	<input type="text" value="Cost Transparency"/>	Access production environments
<input checked="" type="checkbox"/> CanComment	<input type="text" value="Cost Transparency"/>	Permission to view and create comments, and update or delete comments you have created
<input checked="" type="checkbox"/> CanExportExcel	<input type="text" value="Cost Transparency"/>	Allow Export to Excel
<input checked="" type="checkbox"/> CanExportPDF	<input type="text" value="Cost Transparency"/>	Allow Export to PDF
<input checked="" type="checkbox"/> CanExportTableau	<input type="text" value="Cost Transparency"/>	Allow Export to Tableau
<input checked="" type="checkbox"/> CreateUserTasks	<input type="text" value="Cost Transparency"/>	Create action items

Discussion

- Has anyone created custom roles for their organization? If so, what for?



Application Access

Application Permissioning

- Frontdoor – Applications
 - Control what shows on the Homepage with Visibility by role.

Access Administration

Users Environment Access Roles Applications Reports

Customer: regoconsultingpartner.com Environment: sandbox [Create Group](#)

Default Group
This is the default group for applications.

Name	Application	Visible to	Actions
Apptio BI	Apptio BI	Visible to any user with permissions for Apptio BI	Edit Visibility Group ▼
Insights	Insights	Visible to any user with permissions for Insights	Edit Visibility Group ▼
Cloudability	Cloudability	Visible to any user with permissions for Cloudability	Edit Visibility Group ▼
DataLink	DataLink	Visible to any user with permissions for DataLink	Edit Visibility Group ▼
Action Plans	Action Plans	Visible to any user with permissions for Action Plans	Edit Visibility Group ▼
DataLink (Classic)	DataLink (Classic)	Visible to any user with permissions for DataLink (Classic)	Edit Visibility Group ▼
ABBV POC	Cost Transparency	Nobody	Edit Visibility Show Rename Group ▼
ABBV POC2	Cost Transparency	Nobody	Edit Visibility Show Rename Group ▼
Agile Insights	Cost Transparency	Nobody	Edit Visibility Show Rename Group ▼
Agile Insights (Cost Transparency)	Cost Transparency	Visible to any user with permissions for Cost Transparency	Edit Visibility Hide Rename Group ▼
Apptio Value Explorer	Cost Transparency	Visible to any user with permissions for Cost Transparency	Edit Visibility Hide Rename Group ▼

Report Access

Report Collection Permissioning

- Project Tab
 - Report Collections
 - Assign what reports who in the collection and what roles can view the collection.

The screenshot shows the Rego software interface with the 'Project' tab selected. The 'Report Collections' icon is highlighted in the Project Data section. A 'Manage Report Collections' dialog box is open, showing a list of collections on the left and configuration options on the right.

Manage Report Collections

Selected Collection: IT Financials

Hide in Report Collections menu.

Viewable By:

Everyone

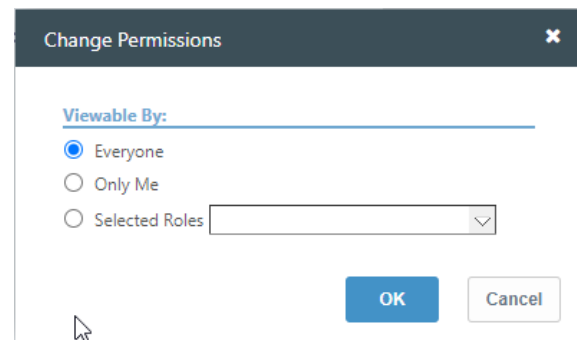
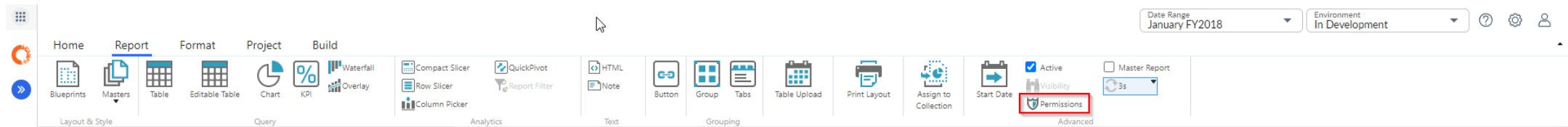
Selected Roles:

Financial Review	<input checked="" type="checkbox"/> Show in navigator
Alias: Not specified	
Financial Analysis	<input checked="" type="checkbox"/> Show in navigator
Alias: Not specified	
Cost Pool Analysis	<input checked="" type="checkbox"/> Show in navigator
Alias: Not specified	
Financial Analysis - OpEx Transaction	<input type="checkbox"/> Show in navigator
Alias: Not specified	
Financial Analysis - CapEx Trend	<input type="checkbox"/> Show in navigator
Alias: Not specified	

Buttons: Add Collection, Delete Collection, Close

Report Permissioning

- Report Tab
 - Permissions
 - Sets what roles can see the individual report.

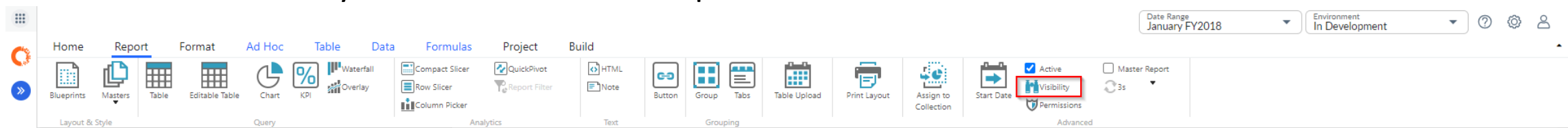


Report Component Visibility

- Report Tab

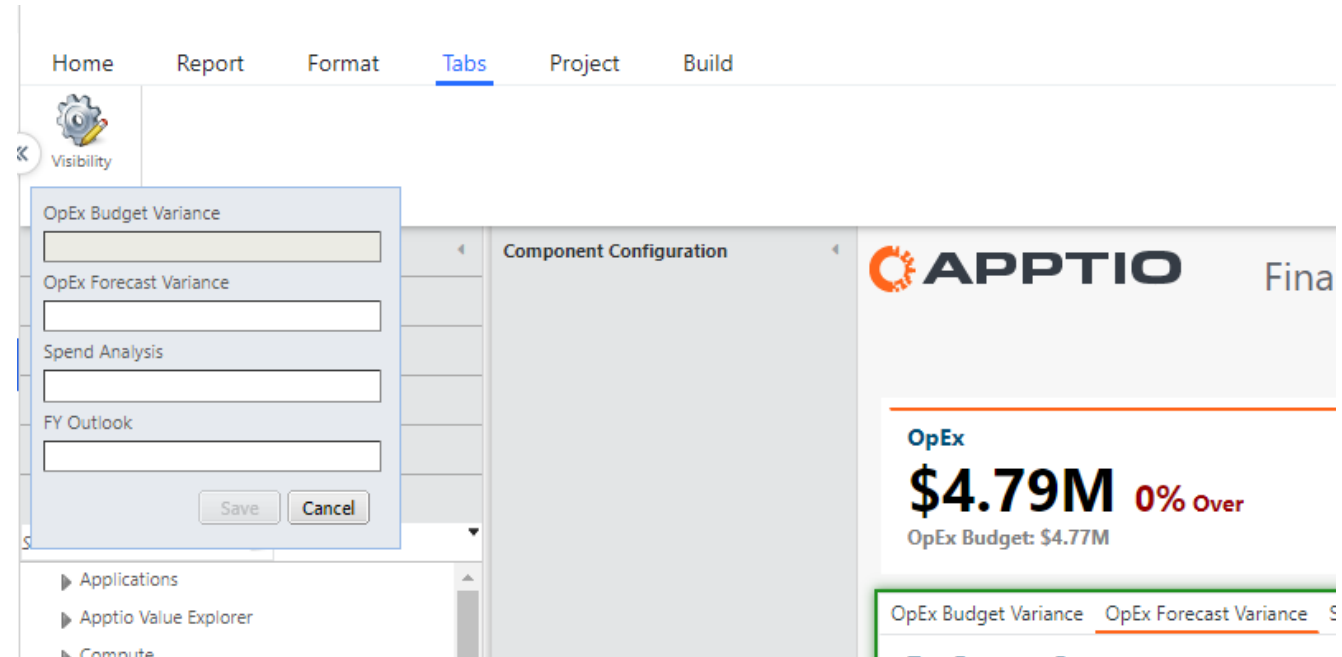
- Visibility

- Sets what role can see the individual component.
 - Can also use Dynamic text to hide component.

A screenshot of the 'Report Component Visibility' dialog box. The dialog has a dark header with the title 'Report Component Visibility' and a close button. Below the header, there is a section titled 'Show Component Only If' with a blue underline. Under this section, there are three checkboxes: 'Component contains data', 'User's current role is', and 'Dynamic text does not evaluate to "hidden"'. The 'User's current role is' checkbox is selected, and its corresponding dropdown menu is open, showing 'Apptio Admin, Apptio Partner'. Below the checkboxes is a large text area for dynamic text. At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

Tab Component Visibility

- Tab Component Visibility
 - Visibility
 - `<%=IF(eval("${CurrentUser}":{"Users.Role"}))
="Admin","enabled","hidden")%>`



Row Level Security

Row Level Security

- Purpose
 - To limit visibility of rows of data within reports
 - Allows user to more quickly view the data they care about
 - Prevent users from viewing data that they should not have access to



Discussion

- Is anyone leveraging the Row Level Security feature within their Projects?
- Why are you using the Row Level Security feature?
- How are you managing the tables for Row Level Security?



Row Level Security

Environment
In Development

- Customer Selection
- Access Administration
- Multi-Currency Configuration
- New Project...
- Import...
- Change Domain...
- Speedtest
- Data Advisor
- Reference Applications
- Configure Row-Level Security
- Task Manager
- What's New
- About

Home Project Build

View New Save Check Out Check In Revert Changes Rename Delete Undo Redo Cut Copy Paste Update Document Update Workspace Auto Calculate Create Version Remove Version Export 3s Recommendations

Project Explorer

Tables

Search

General

Row Level Security Demo

This document is read only - check it out to make changes.

Steps

Table

User Email	Cost Center	Department ID
eric.chan@regoconsulting.com	CC-200	Dept-01
eric.chan@regoconsulting.com	CC-210	Dept-01
eric.chan@regoconsulting.com	CC-220	Dept-10
eric.chan@regoconsulting.com	CC-221	Dept-10
Rob.DeLeo@regoconsulting.com		Dept-10
Rob.DeLeo@regoconsulting.com		Dept-01

Row Level Security (Cont.)

Steps ← **Row-Level Security** ⓘ Specify a per-user security filter on a table of data

Add condition(s) to show rows for selected users:

intersects where user is ✕

OR

intersects where user is ✕

Enter username to preview Row-Level Security:

Cost Source Master Data.Cost Center	Cost Source Master Data.Journal ID	Cost Source Master Data.Journal Line ID	Cost Source Master Data.Account Group	Cost Source Master Data.Account Subgroup
CC-200			Salaries & Benefits	Benefits
CC-210			Salaries & Benefits	Benefits
CC-220			Salaries & Benefits	Benefits
CC-200			Salaries & Benefits	Benefits
CC-210			Salaries & Benefits	Benefits
CC-220			Salaries & Benefits	Benefits
CC-200			Salaries & Benefits	Benefits
CC-210			Salaries & Benefits	Benefits

ITP Access



ITP Cost Object Permissions

- Visibility is set in the Cost Object Permissions
 - User can be added at Multiple Levels
 - Cost Object Permissions is a "Live" table and updates are effective immediately

The screenshot shows the APPTIO interface for Cost Object Permissions. The left sidebar contains the following menu items: IT Planning, Planning, Spend Management, Change History, Configuration, Reference Data, Schema, Custom Lists, Line Item Filters, Line Item Code Prefix, **Cost Object Permissions** (highlighted with a red box), Labor Allocation Rules, Score, and Calendar Setup.

The main content area is titled 'Cost Object Permissions' and includes a notification: 'The Enforce View Permissions setting on the Company Profile page is disabled. All users can view active plans in Open and Final state.' Below this, there are tabs for 'Permissions', 'Departments', and 'Projects'. The 'Departments' tab is active, showing a table of permissions. The table has columns for Cost Object, Owner(s), Editor(s), View Only, Can View Sensitive Columns, and Can View Sensitive Financials. The 'All Departments' row is expanded, showing a list of cost objects with their respective owners and editors.

Cost Object	Owner(s)	Editor(s)	View Only	Can View Sensitive Columns	Can View Sensitive Financials
▼ All Departments					
▼ APPS - App Dev & Support	doug.greer	audrey.mitch		audrey.mitch, doug.greer	audrey.mitch, doug.greer
CC-200 - Apps - Back Office					
CC-210 - Apps - Line of Business			mnealey	mnealey	mnealey
CC-220 - Apps - Sales & Ops					
▶ EUS - End User Services					
▶ I&O - Infra & Ops					
CC-390 - Office of the CIO					
CC-395 - Program Office					
CC-370 - Security & Risk Mgmt					

ITP – Sensitive Columns and Sensitive Financials

- Sensitive Columns
 - Only for the Labor Tab
 - Set in the Labor Schema, by selecting the column
- Sensitive Financials
 - Any line item generated by Labor Allocation Rules

Cost Object Permissions

Permissions | Departments

Using Departments from: FY2023 July Forecast - ReqsSync View: Hierarchy List

Cost Object	Owner(s)	Editor(s)	View Only	Can View Sensitive Columns	Can View Sensitive Financials
▼ All Departments		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
▼ APPS - App Dev & Support		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CC-200 - Apps - Back Office		<input checked="" type="checkbox"/> cco1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> cco1	<input checked="" type="checkbox"/> cco1
CC-210 - Apps - Line of Business		<input checked="" type="checkbox"/> rob.deleo	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> rob.deleo	<input checked="" type="checkbox"/> rob.deleo
CC-220 - Apps - Sales & Ops		<input checked="" type="checkbox"/> rob.deleo	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> rob.deleo	<input checked="" type="checkbox"/> rob.deleo
▶ APPDEV - Application Development & Support		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
▶ INIT - Business-funded Initiatives		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
▶ EUS - End User Services		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
▶ I&O - Infra & Ops	rob.deleo	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> rob.deleo	<input checked="" type="checkbox"/> rob.deleo
▶ CIO - Office of the CIO		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Configuration Schema

Labor
Configure what attributes define Labor.

Available Attributes

Search by Name

Adjust	Boolean
Adjustment %	Percentage
Adjustment Effective Date	Date
Amount	Decimal
Base Compensation	Money

Edit System Attribute

Field Name *
Base Compensation

Data Type *
Money

Default Value

Mandatory for Data Entry Sensitive Data

ITP - Permissions

- Restrict Access to Tabs in ITP
 - Clone Cost Center Owner
 - Remove the View Permission

Access Administration

Users Environment Access Roles Applications Reports

Role: Clone Role

Customer: regoconsultingpartner.com
Environment: sandbox
Applications: Applio BI [Show +43 more](#)

Customize Permissions Confirm

Type: Custom

Name: Copy Of Cost Center Owner

Description: Can edit only their cost centers. Assign budget owners and group bt

Search Permissions Filter by: Selected State (2)

Permission	Application Types	Description
<input checked="" type="checkbox"/> CanComment	Cost Transparency	Permission to view and create comments, and update or delete comments you have created
<input checked="" type="checkbox"/> EditPlanning	IT Planning	Can view and edit budget and forecast OPEX and CAPEX financial information in the Planning component (via the Component menu)
<input checked="" type="checkbox"/> Self-Service Reporting Access	Applio BI	Allow use of the Self-Service Reporting application.
<input checked="" type="checkbox"/> ViewAssets	IT Planning	Can view the Assets tab and edit asset line item details (via the View menu, Line items command, Assets tab)
<input checked="" type="checkbox"/> ViewContracts	IT Planning	Can view the Contracts tab and edit contract line item details (via the View menu, Line items command, Contracts tab)
<input checked="" type="checkbox"/> ViewLabor	IT Planning	Can view the Labor tab and edit labor line item details (via the View menu, Line items command, Labor tab)

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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