Sponsored by APPTIO

regoUniversity
SAN DIEGO • 2023

Data Visibility and Access Controls in ApptioOne

Your Guides:

Eric Chan and Rob DeLeo

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

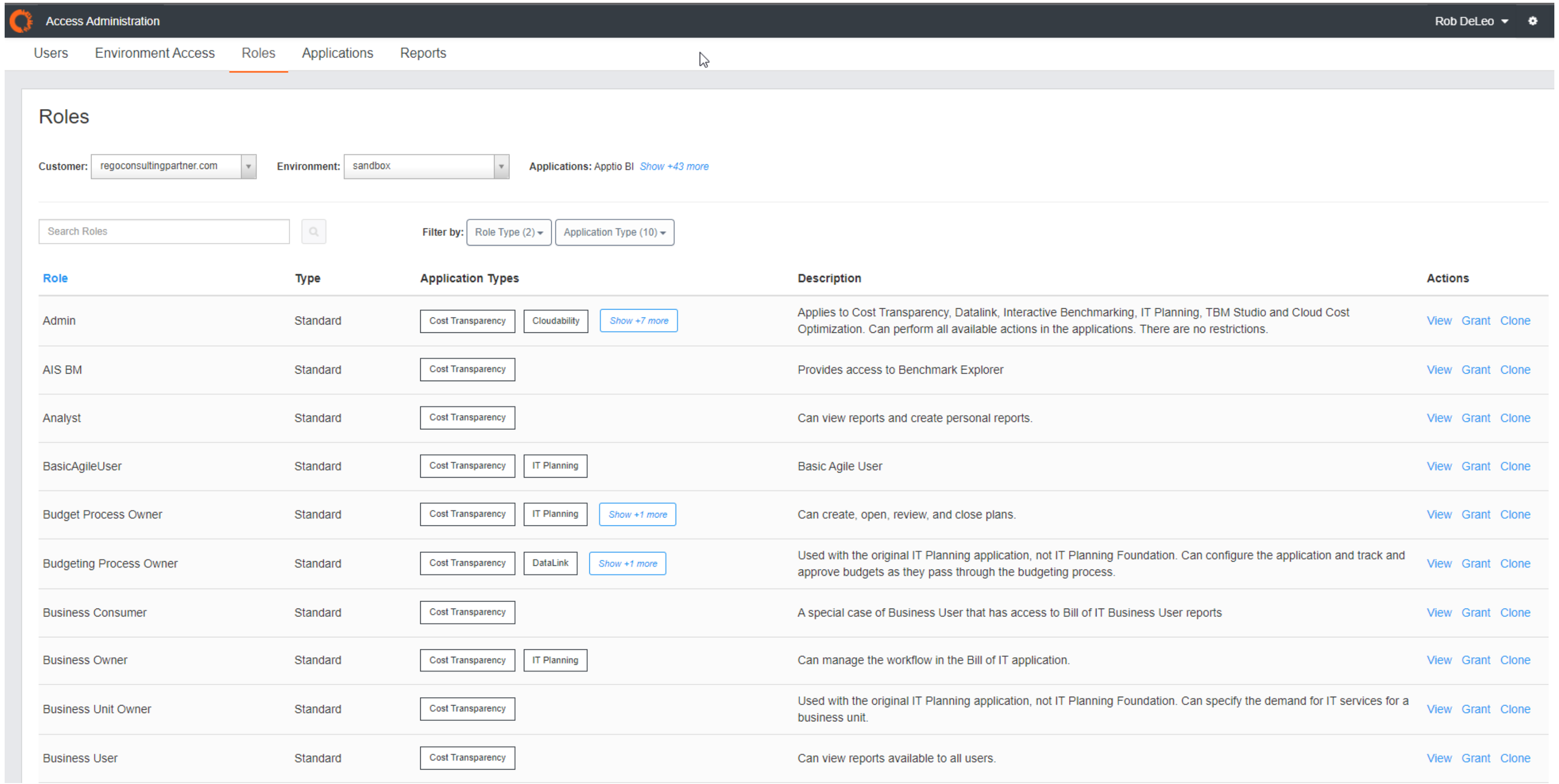
Discussion

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

Apptio Roles

Standard Roles vs Custom Roles

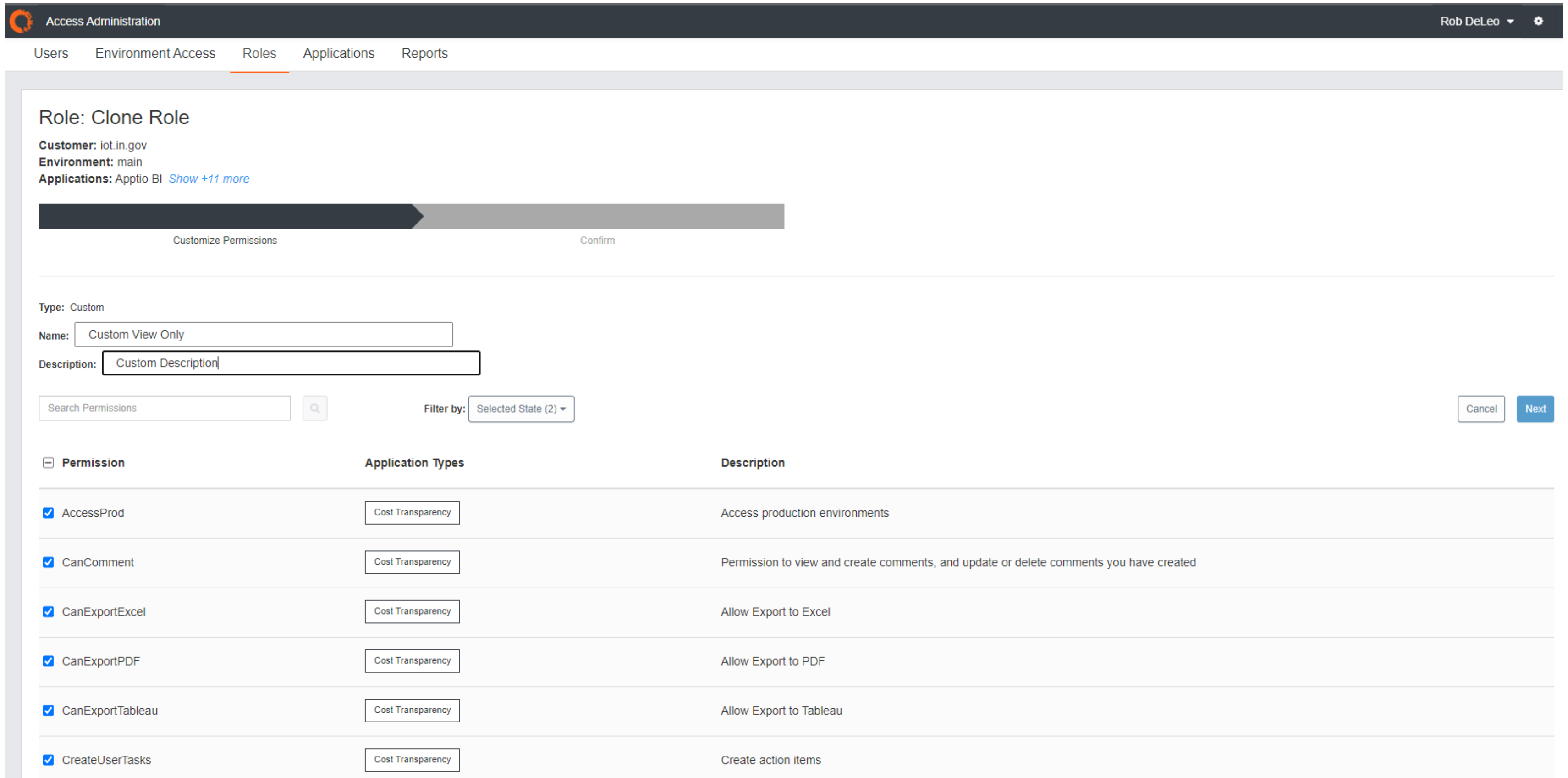
- Standard Roles
  - Out of box set by Apptio.
  - Unable to edit the permissions of Standard Roles.



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.



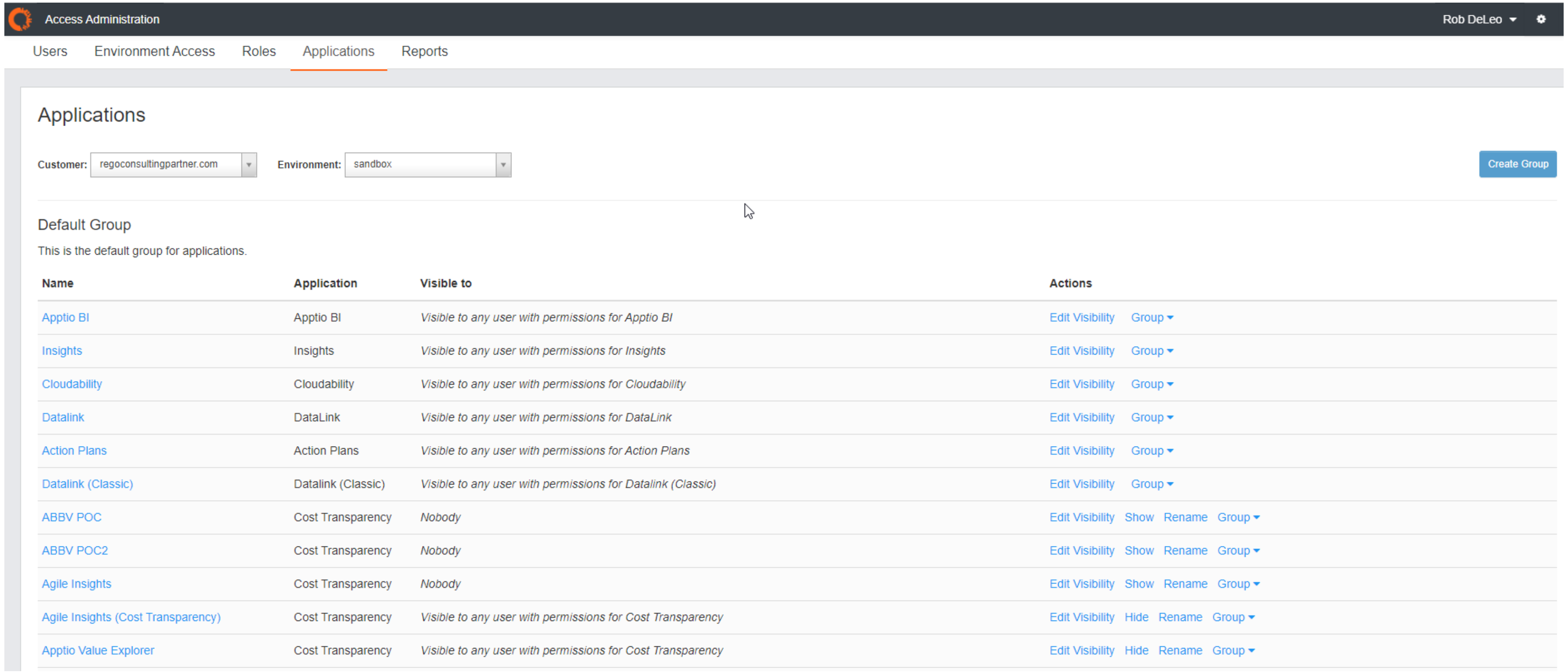
Discussion

- 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   Rob DeLeo

Users | Environment Access | Roles | Applications | Reports

Applications

Customer: regoconsultingpartner.com   Environment: sandbox   Create Group

Default Group

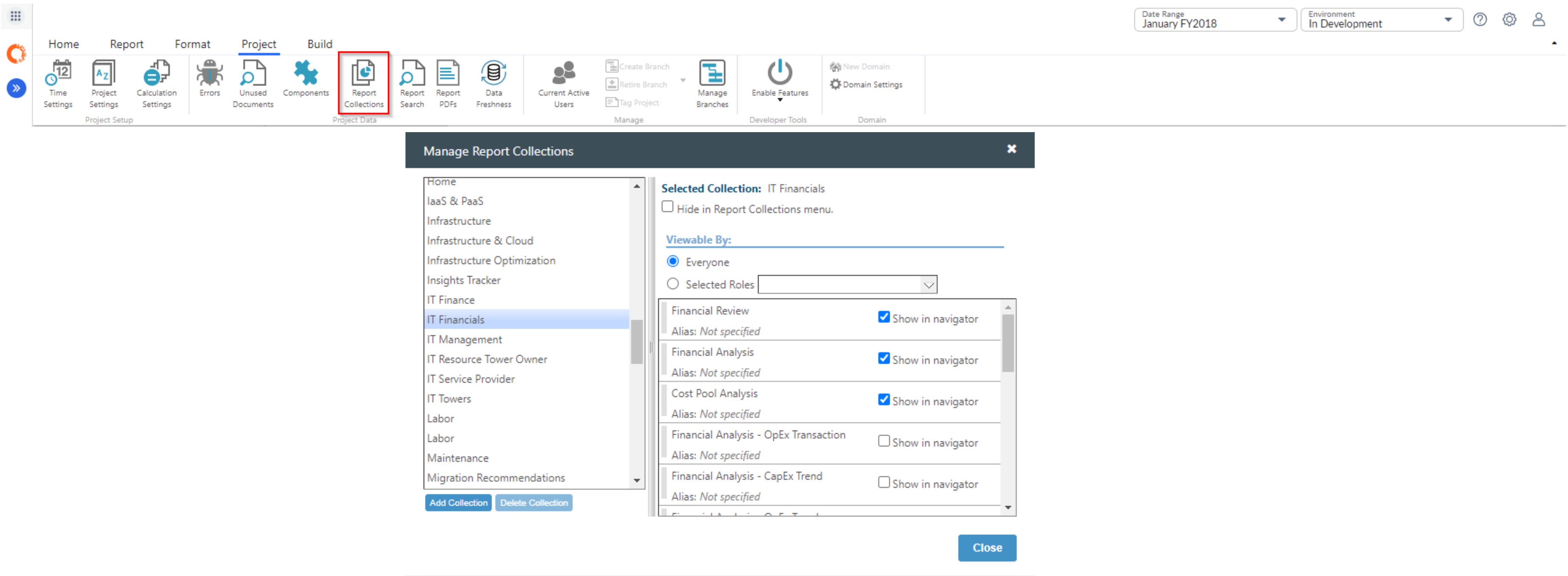
This is the default group for applications.

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

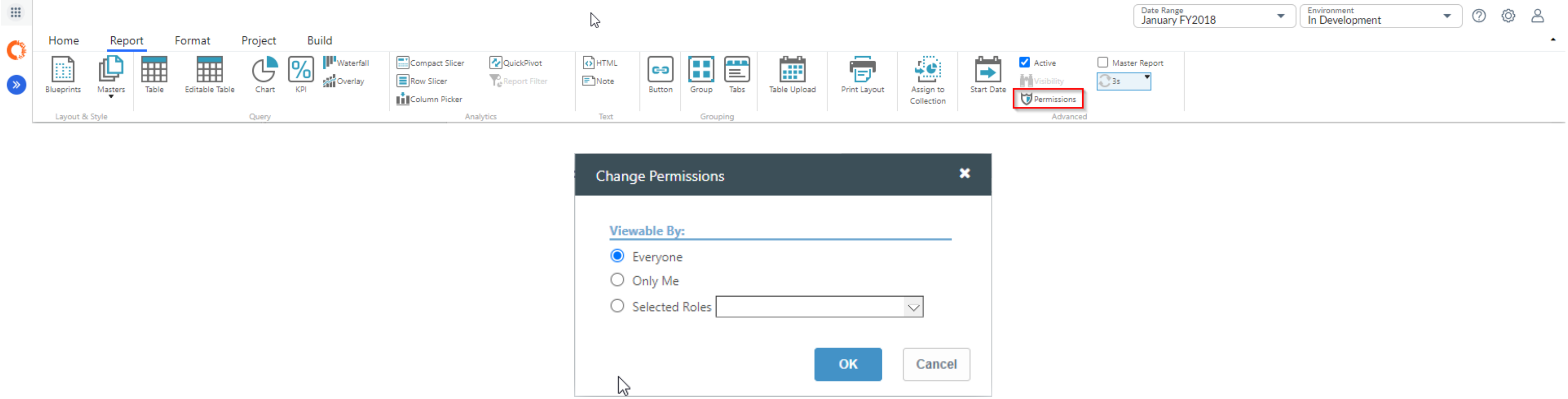
Report Collection Permissioning

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



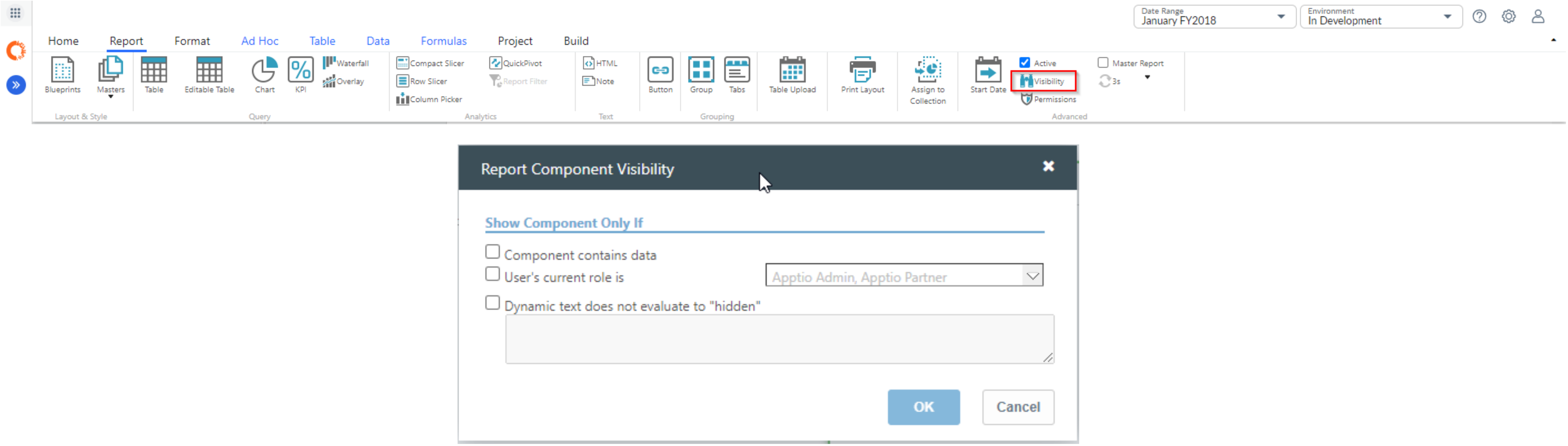
Report Permissioning

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



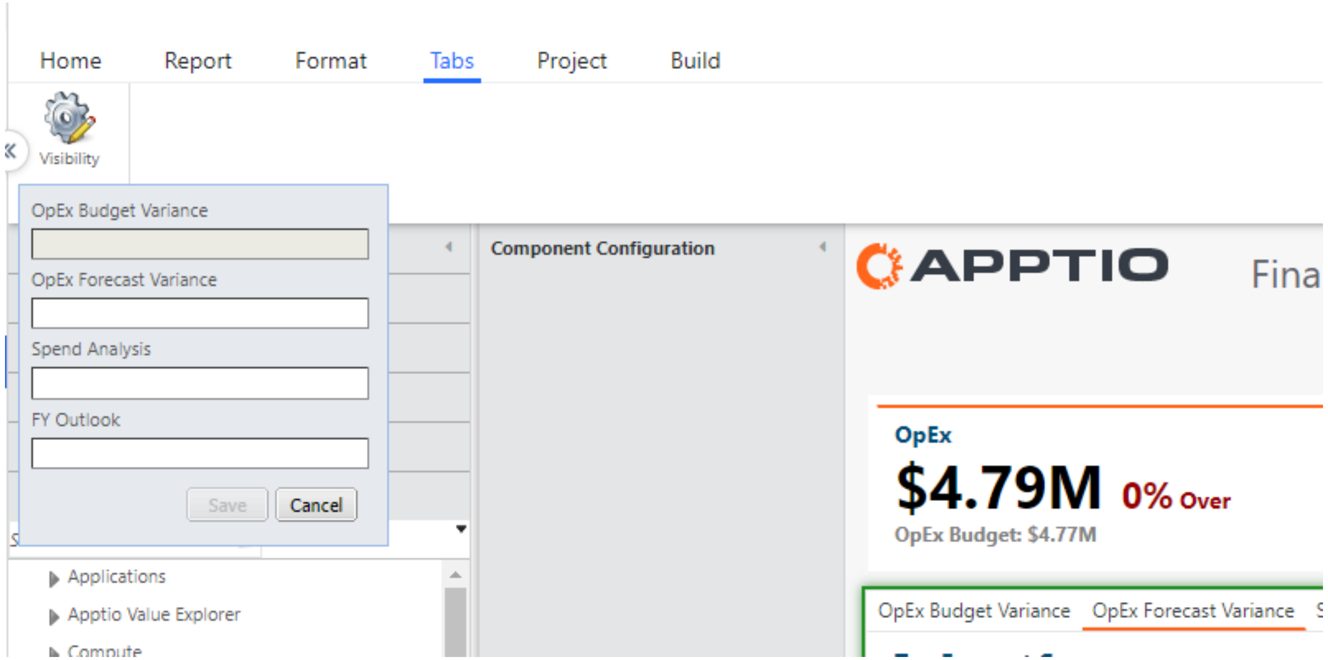
Report Component Visibility

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



Tab Component Visibility

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



Row Level Security

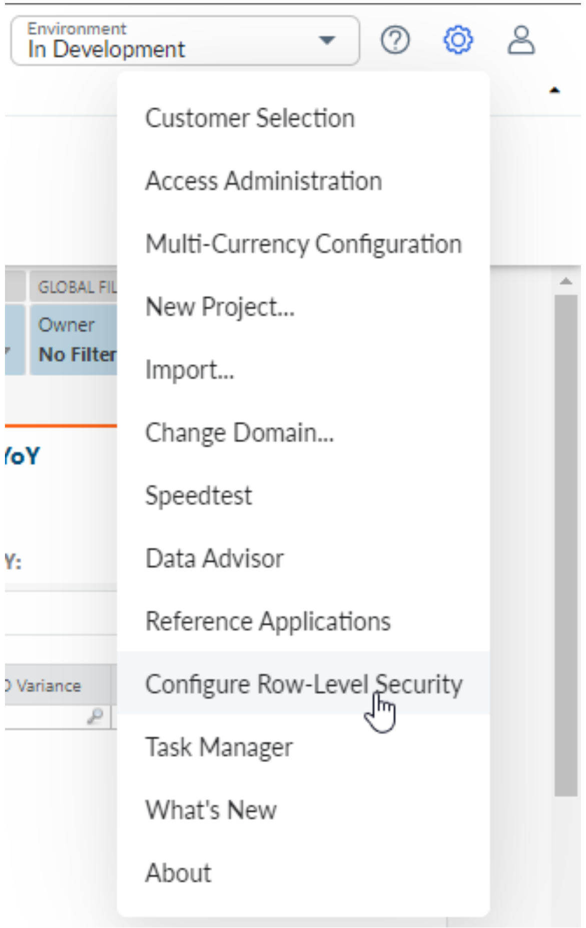
Row Level Security

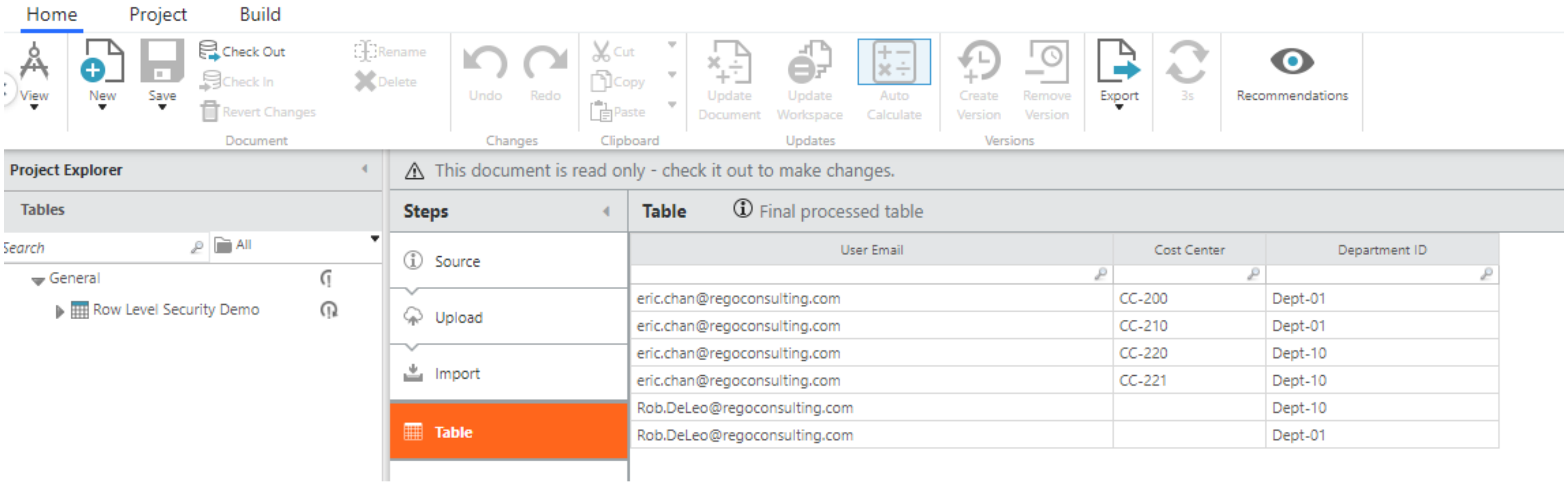
- Purpose
  - To limit visibility of rows of data within reports
  - Allows user to more quickly view the data they care about
  - Prevent users from viewing data that they should not have access to

Discussion

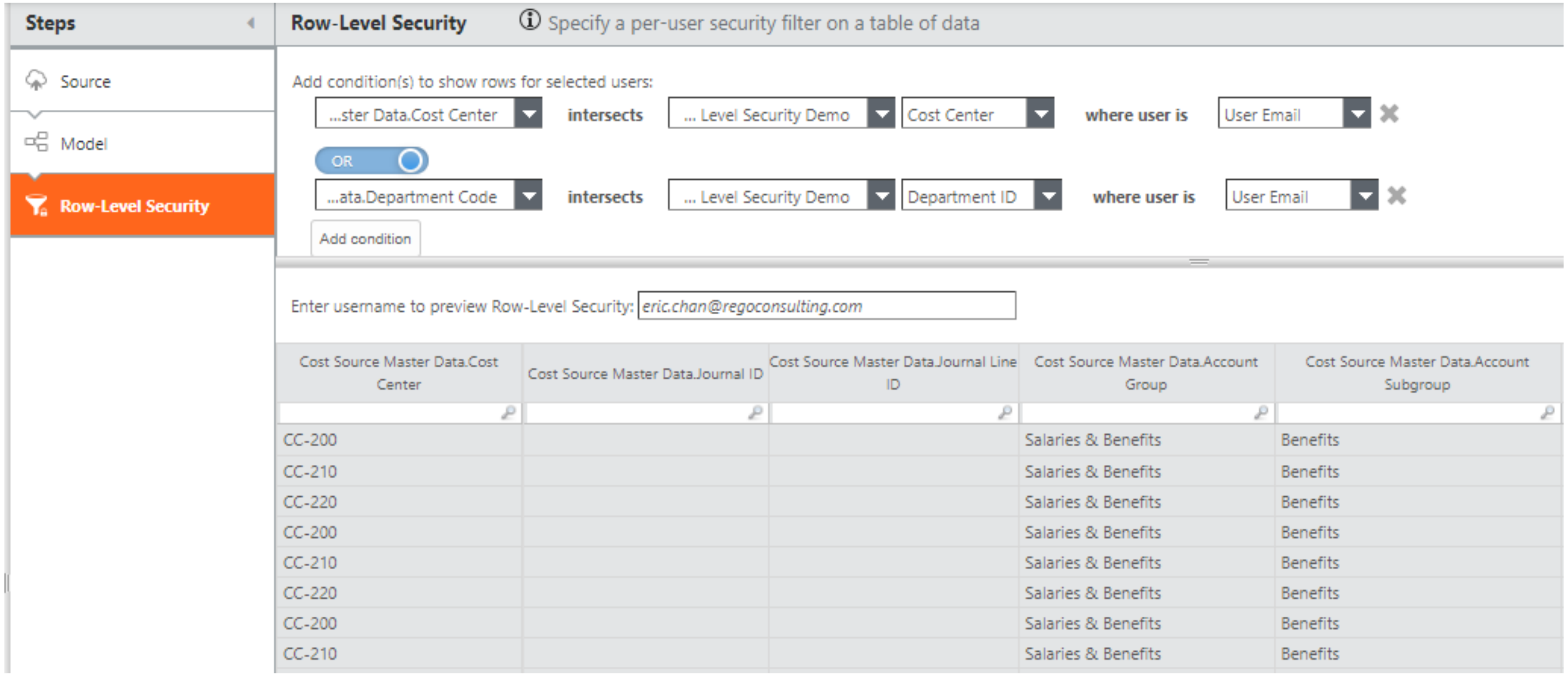
- Is anyone leveraging the Row Level Security feature within their Projects?
- Why are you using the Row Level Security feature?
- How are you managing the tables for Row Level Security?

Row Level Security





Row Level Security (Cont.)

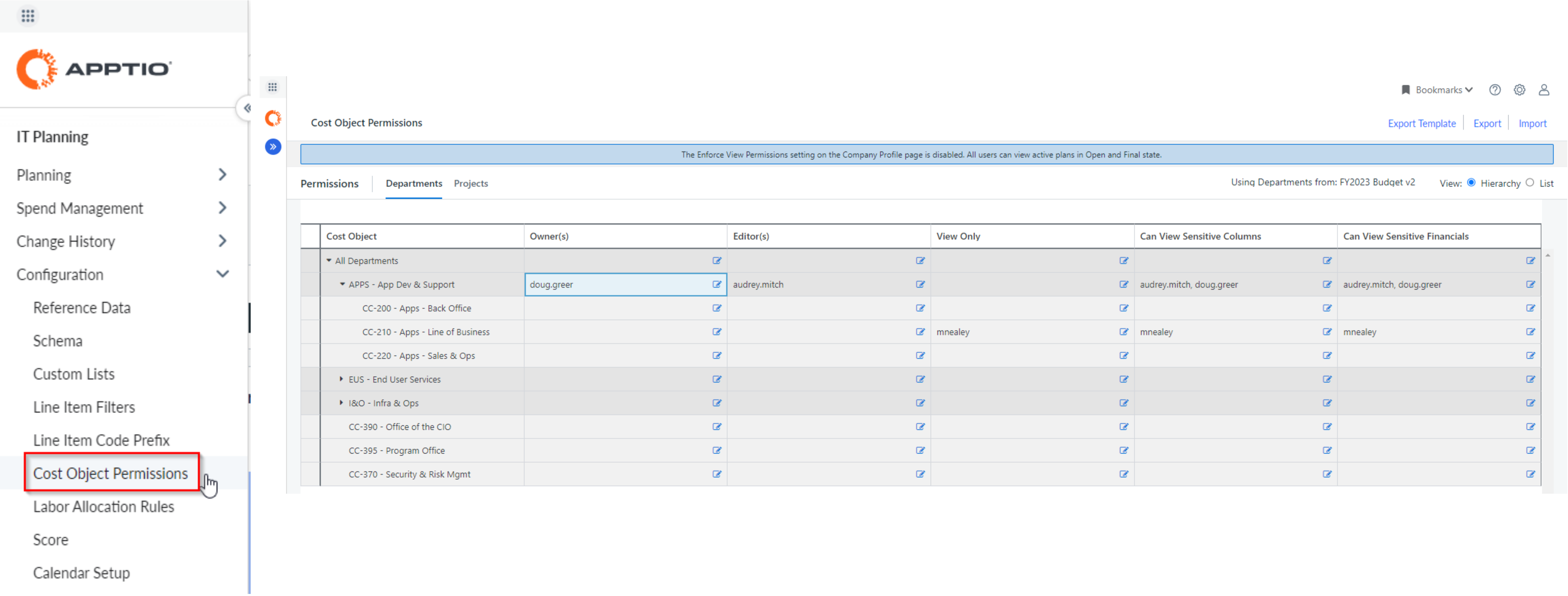


Cost Source Master Data.Cost Center	Cost Source Master Data.Journal ID	Cost Source Master Data.Journal Line ID	Cost Source Master Data.Account Group	Cost Source Master Data.Account Subgroup
CC-200			Salaries & Benefits	Benefits
CC-210			Salaries & Benefits	Benefits
CC-220			Salaries & Benefits	Benefits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

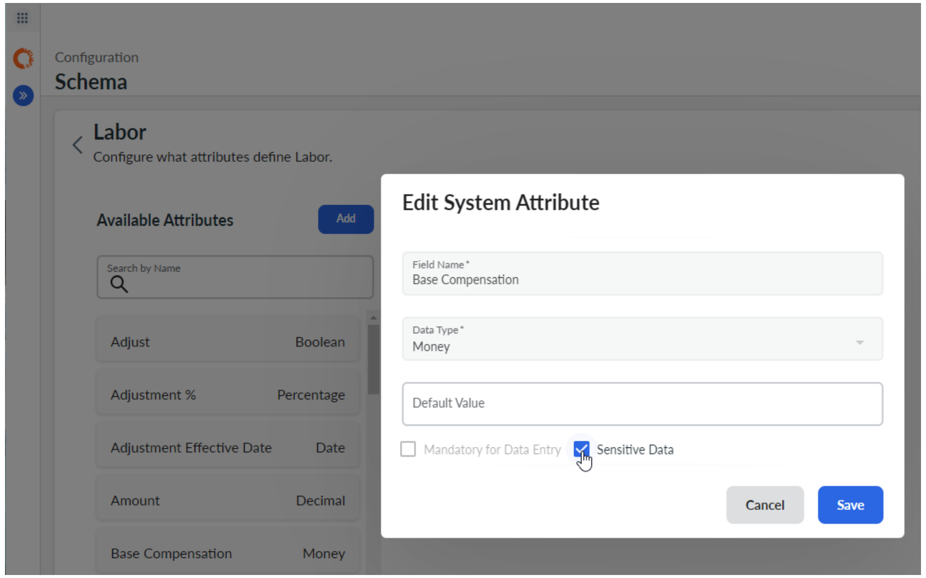
ITP Cost Object Permissions

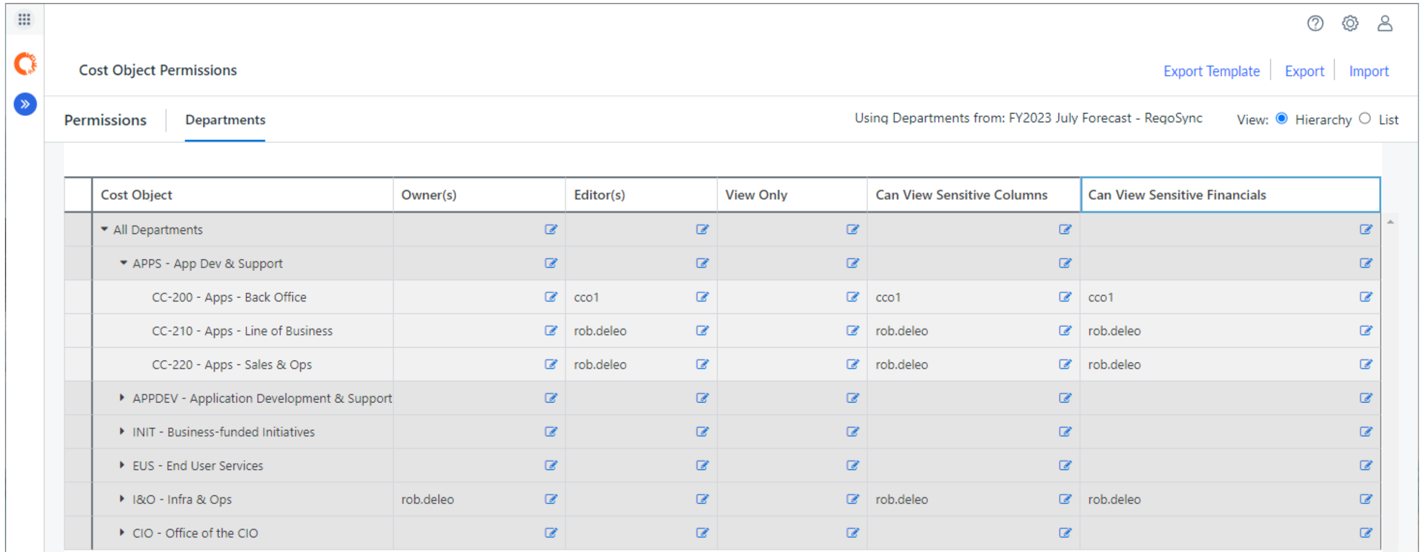
- Visibility is set in the Cost Object Permissions
  - User can be added at Multiple Levels
  - Cost Object Permissions is a "Live" table and updates are effective immediately



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

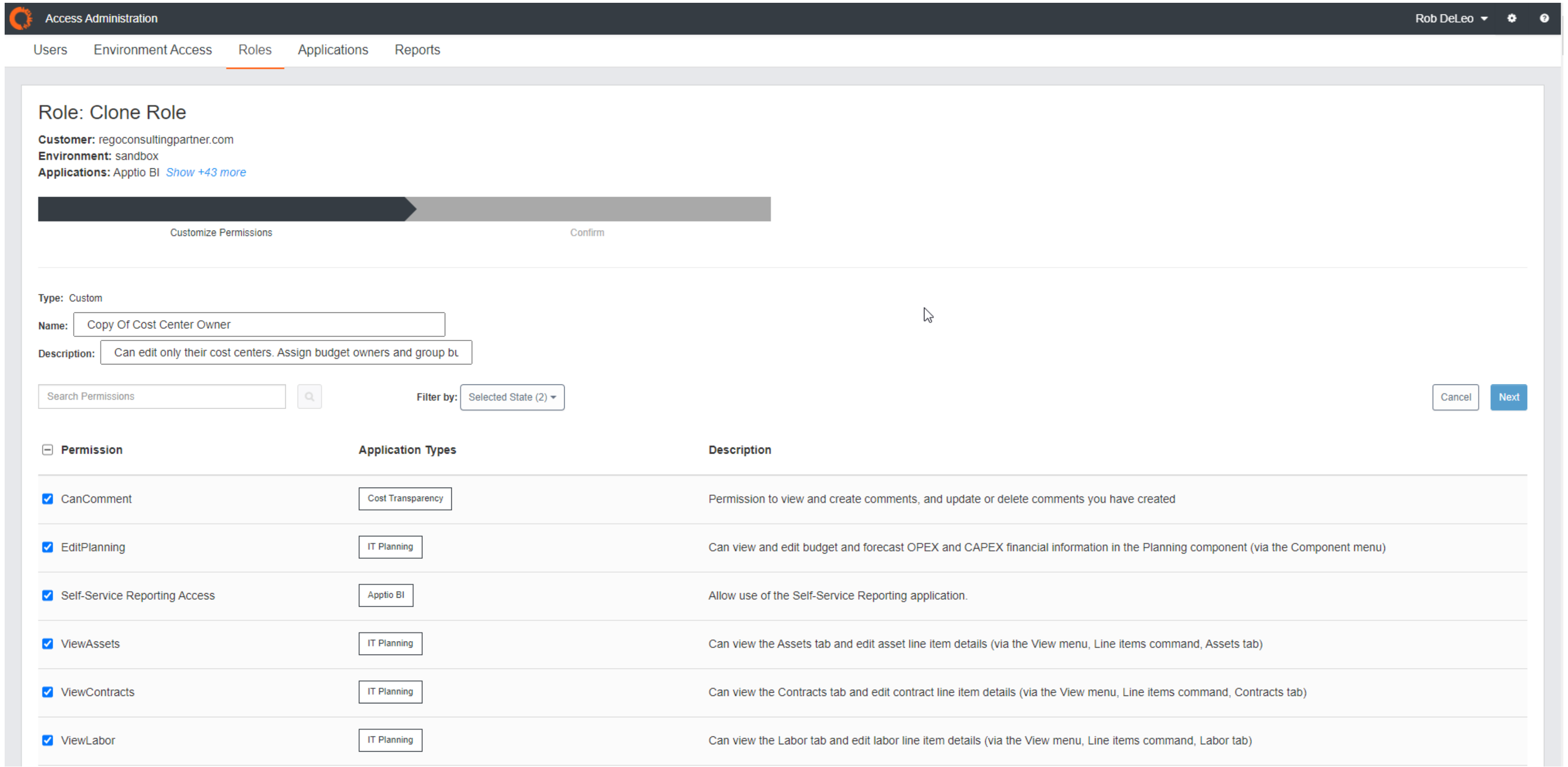




Cost Object	Owner(s)	Editor(s)	View Only	Can View Sensitive Columns	Can View Sensitive Financials
All Departments					
APPS - App Dev & Support					
CC-200 - Apps - Back Office		cco1		cco1	cco1
CC-210 - Apps - Line of Business		rob.deleo		rob.deleo	rob.deleo
CC-220 - Apps - Sales & Ops		rob.deleo		rob.deleo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

ITP - Permissions

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



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.

Phone
888.813.0444

Email
info@regoconsulting.com

Website
www.regouniversity.com