



In-App Documentation Best Practices

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Apptio Documentation Best Practices

Making Your Data and Model Make Sense



Let Rego be your guide.

- Thorough and Accurate Documentation in Apptio not only ensures data integrity but also optimizes collaboration among stakeholders
- Today's Presentation Focuses On Three Main Areas:
 - Organizing Your Data Streamlining Workflows, Reducing Errors and Confusion, and Accelerate Setup and Problem Resolution
 - Dataset Documentation Maintaining Audit Trails, Ensuring Understanding, and Real-Time Upload Documentation
 - Allocation Documentation The Role of Allocation Documentation, Detailed Naming, and Audit Trails for Rules

Organizing Your Data – Naming Conventions

- Documentation in your Apptio project starts the moment you start to load data into your project, starting with your table name
 - Name the table in a way that is meaningful to users. I.E. "SAP General Ledger."
 - Additionally, it is good practice to have a common suffix for data that may have multiple appends.
 - For Example a customer that has multiple ERPs may use:
 - SAP General Ledger
 - Peoplesoft General Ledger

Create Ta	ble	×
	SAP General Ledger 01 - Financial Data	
	ок	Cancel

Once you have named your dataset in a meaningful and consistent way the next step is making sure you consistently categorize your data appropriately.

- By applying consistent categorical tags you help end users more easily find the data they are searching for.
- Apply numbered prefixes to your predominant data categories, so they are all grouped together at the top of Project Explorer.
 - A similar approach can be applied for segregating Initial Data Loads and Transforms.

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Create Table	×	Project Explorer	r		
		Tables			
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		05 - Business	Units Data		
		06 - Cloud Bill	ing		
		08 - Transform	1		1
		09 - Mapping			
		10 - Proactive	Insights		

Always add comment descriptions when checking-in data sets and configurations changes.

- Comments should always be entered against check-ins. The comments should give an overview of the intended outcome of the check-in.
- These descriptions can help guide future users and serve as important reminders when troubleshooting specific elements in your model.

	cking in your changes will ma he Staging environment.	ke them visible	to other	developers and schedule a new calculation
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Check In

Organizing Your Data – Check-In Comments

Always add comment descriptions when checking-in data sets and configurations changes.

Allocation Notes can be added when you select a allocation in the Model Step.

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Check In

Dataset Documentation – Maintaining Audit Trails

Datasets do not always get loaded into Apptio by the same users. For new users to easily trace data origins, it's vital to use thorough documentation using the Table description section in the Source step.

urce Δ This document has unsa	ived changes.	
File Upload	I Editable Table	Existing Table
 2.File Origin: The specific location from will 3.Dataset Contact: The designated individ 4.Owner's Department: The specific depart 5.Data Availability Window: The designated close). 6.Upload Cadence: The frequency at which 7.Apptio Utilization: Specifies the particular 	e system specified during the Upload process nich Apptio retrieves the source file (e.g., email ual or point of contact responsible for the data tment to which the dataset owner or contact is id timeframe by which the data needs to be rea h data should be refreshed in Apptio, aligning ar Apptio layer or model that uses the data (e.g. ning the data's content and its purpose (e.g., G vied by IT Finance).	box). aset (e.g., John Wayne). s affiliated (e.g., IT Operations). ady for Apptio upload (e.g., 1 week after with the Upload process (e.g., Monthly). g., Financial Layer).

Dataset Documentation – Template Details

Dataset Documentation Examples:

Source System: This should align with the system specified during the Upload process (e.g., SAP).

File Origin: The specific location from which Apptio retrieves the source file (e.g., email box).

Dataset Contact: The designated individual or point of contact responsible for the dataset (e.g., John Wayne).

Owner's Department: The specific department to which the dataset owner or contact is affiliated (e.g., IT Operations).

Data Availability Window: The designated timeframe by which the data needs to be ready for Apptio upload (e.g., 1 week after close).

Upload Cadence: The frequency at which data should be refreshed in Apptio, aligning with the Upload process (e.g., Monthly).

Apptio Utilization: Specifies the particular Apptio layer or model that uses the data (e.g., Financial Layer).

Dataset Overview: A brief outline explaining the data's content and its purpose (e.g., GL Data sourced from SAP serving as the reference for the IT Expense Base, as supplied by IT Finance).

Allocations are essential to a successful model. Therefore it is imperative that we label and detail each allocation, providing clear explanations to their purpose.

Allocation Notes Template:
Allocation Description: Here you want to provide a short description of the intent and the "why" behind the allocation strategy decided upon.
Data Relationship: Describes the purpose behind the data relationship decided upon.
Weighting Used: Describes the weighting strategy, and any nuance in the calculation of the strategy.
Allocation Maturity: Allocation confidence score Good/Better/Best. If possible provide details for how allocation can mature from one level to the next.
Signed Off By: The name of the person or team that signed off on the implemented allocation strategy (example: IT Ops Server Team - 8/31/2023).

Allocation Documentation – Adding Your Notes

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명 Model	Allocation to: O Cost Source
- Model	ALLOCATION TO: Image: Cost Source weight determines the proportion of the value that will be placed on each row. Image: Column of the value that will be placed on each row. Image: Column of Metric of Other Drivers PROJECTS of the PROJECTS of the value that will be placed on each row. Image: Column of Metric of Other Drivers PROJECTS of the Value that will be placed on each row. Image: Column of Deter Drivers PROJECTS of the Value that will be placed on each row. Image: Column of Deter Drivers PROJECTS of the Value that will be placed on each row. Image: Column of Deter Drivers Data Relationship to keep related values together, similar to how you may use a SUMIF function in Excel ™. Source Column of Cost Source Project Key Example of the Value to Cost Source Project Key Image: Add relationship Example of the Value to provide a short description of the intent and the "why" behind the allocation strategy decided upon. Image: Allocation Description: Here you want to provide a short description of the calculation of the strategy. Allocation Maturity: Allocation confidence score Good/Better/Best. If possible provide details for how allocation can mature from one level to
	bigged Off By: The name of the person or team that signed off on the implemented allocation strategy (example: IT Ops Server Team – 8/31/2023).
	Delete Apply Ok

Allocation Notes can be added in the Model Step after you click on a allocation. 11

Allocation Documentation – Data Quality Reports

Once notes are added not only are they viewable on the allocation, but they can also be viewed and exported in the Data Quality Reports.

ta Expiration Cost	Allocation Strategies	CapEx Allocation Str	ategies 🕜				
llocation Strate	gy Details						
Export to Excel							
From Object	To Object	Driver	Cardinality	Allocated Cost	% Allocated	User Description	
P	2	2	L	L	L	ل	ρ
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ime Tracking	Projects	Time Tracking	One-to-one	\$0	100%		

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Allocation Documentation – Metrics View

Similarly when selecting the Metric where the allocation is documented the notes can be viewed in the Allocation Strategies section.

Modeled Metr	ic ① A metric	that car	n be used for mo	del allocations					
Allocation Strateg	jies 🔻								
Model Overview	om Object		From Filter	To Object	To Filter	Cardinality	Cost	% Alloc	User Description
 Allocation Strateg Unallocated 	ies	L	L	P	L	P	L	2	P
Diagram									
Cost Source	Cost Source			Projects		One-to-one	\$0		Allocation Notes Template: Allocation Description: Here you want to provide a short description of the intent and the "why" behind the allocation strategy decided upon. Data Relationship: Describes the purpose behind the data relationship decided upon. Weighting Used: Describes the weighting strategy, and any nuance in the calculation of the strategy. Allocation Maturity: Allocation confidence score Good/Better/Best. If possible provide details for how allocation can mature from one level to the next. Signed Off By: The name of the person or team that signed off on the implemented allocation strategy (example: IT Ops Server Team – 8/31/2023).

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- Class Name = regoUniversity
- Course **Description**
- Date Started = Today's Date
- Date Completed = Today's Date ۰
- Hours Completed = 1 PDU per hour of class time ٠
- Training classes = **Technical** ٠
- Click on I agree and Submit



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