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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.

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Introduction

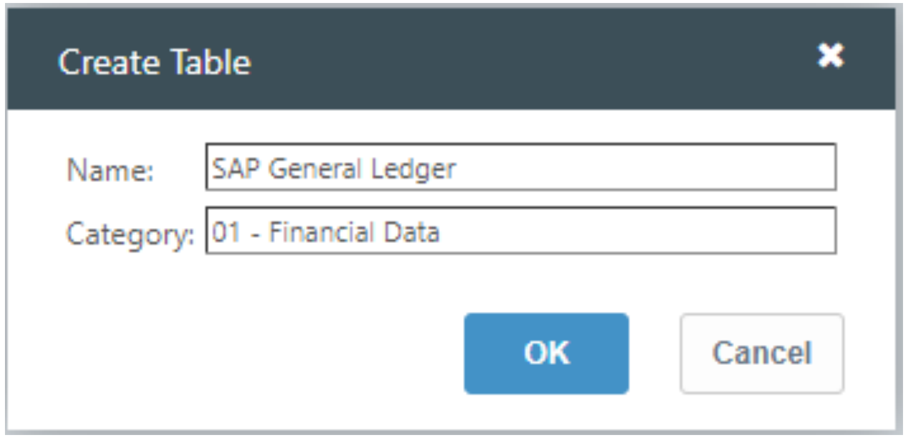
- Thorough and Accurate Documentation in Apptio not only ensures data integrity but also optimizes collaboration among stakeholders

- 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

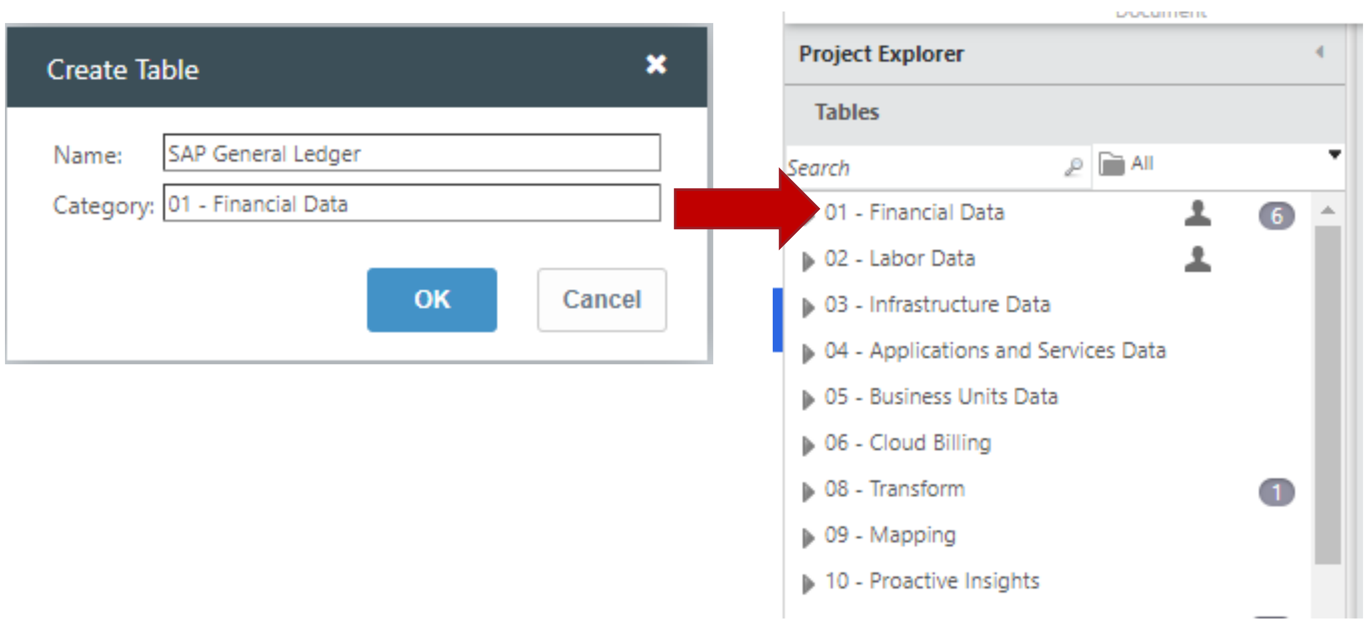
- Name the table in a way that is meaningful to users. I.E. "SAP General Ledger."
- Additionally, it is good practice to have a common suffix for data that may have multiple appends.
  - For Example a customer that has multiple ERPs may use:
    - SAP General Ledger
    - Peoplesoft General Ledger



Organizing Your Data - Category

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

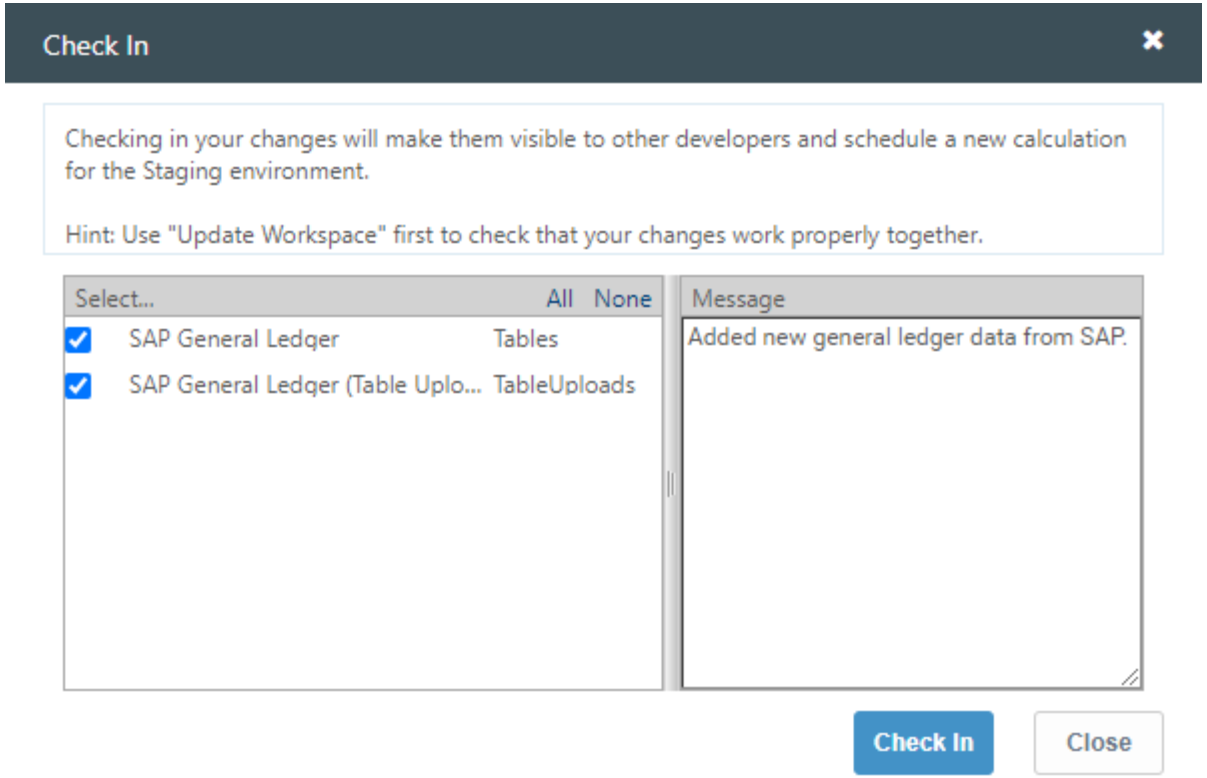
- By applying consistent categorical tags you help end users more easily find the data they are searching for.
- Apply numbered prefixes to your predominant data categories, so they are all grouped together at the top of Project Explorer.
  - A similar approach can be applied for segregating Initial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



Organizing Your Data – Check-In Comments

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.



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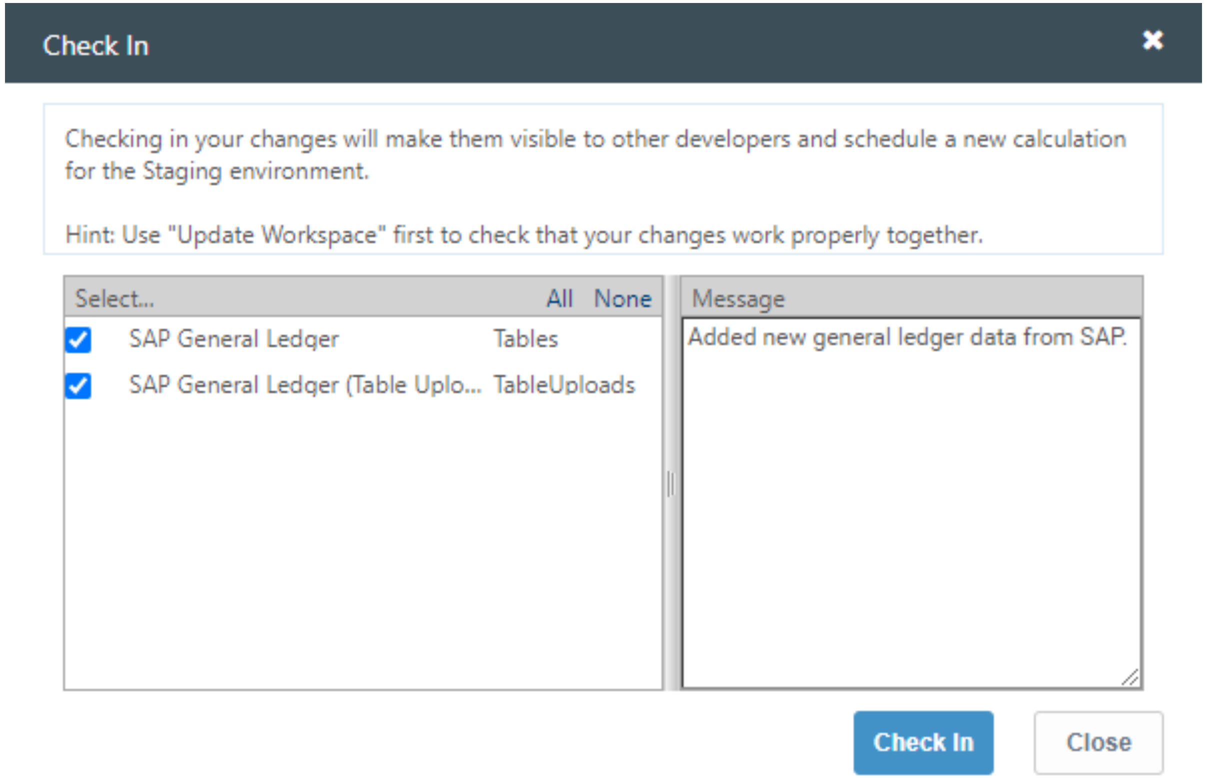
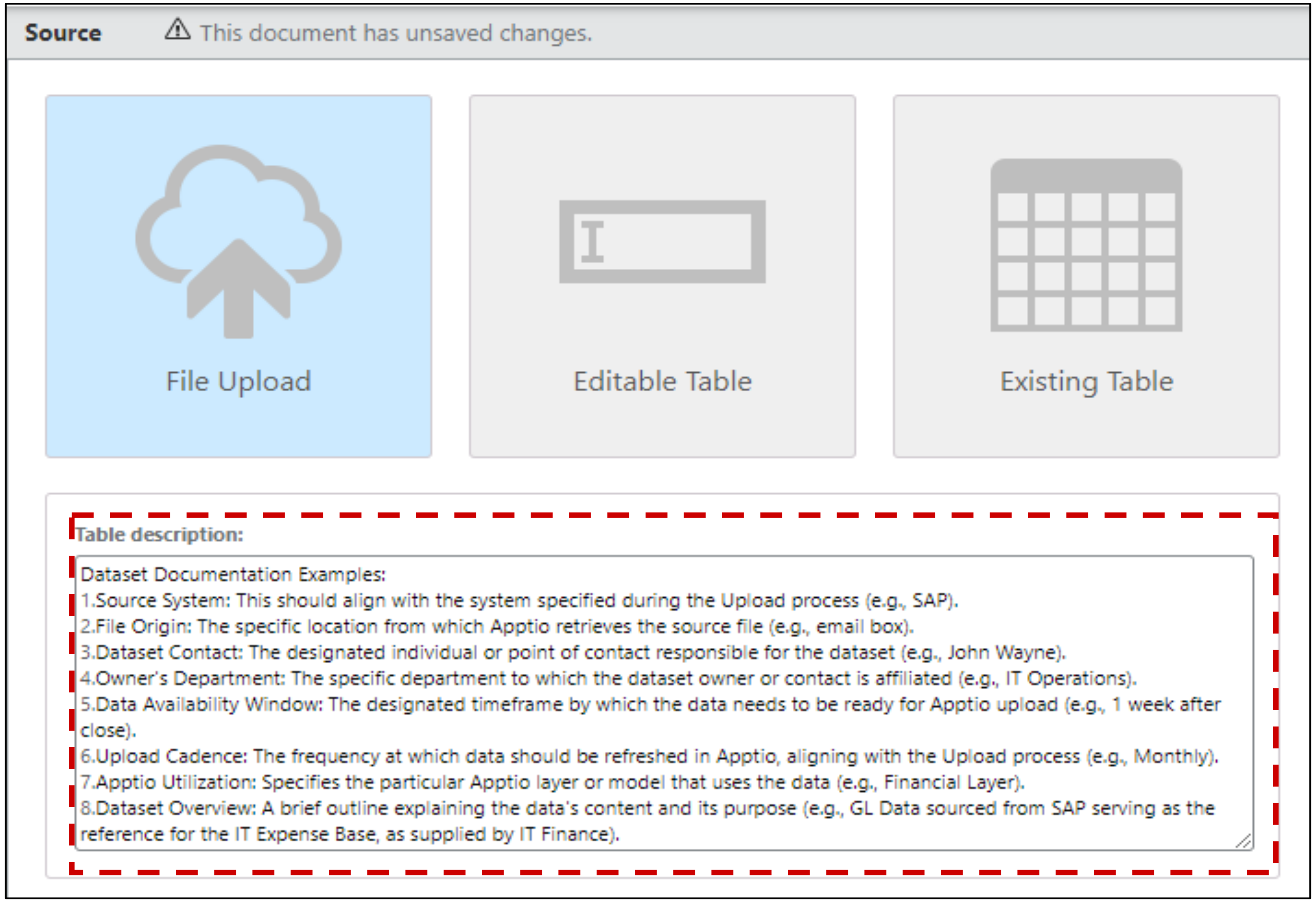


Allocation Notes can be added when you select a allocation in the Model Step.

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.



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).

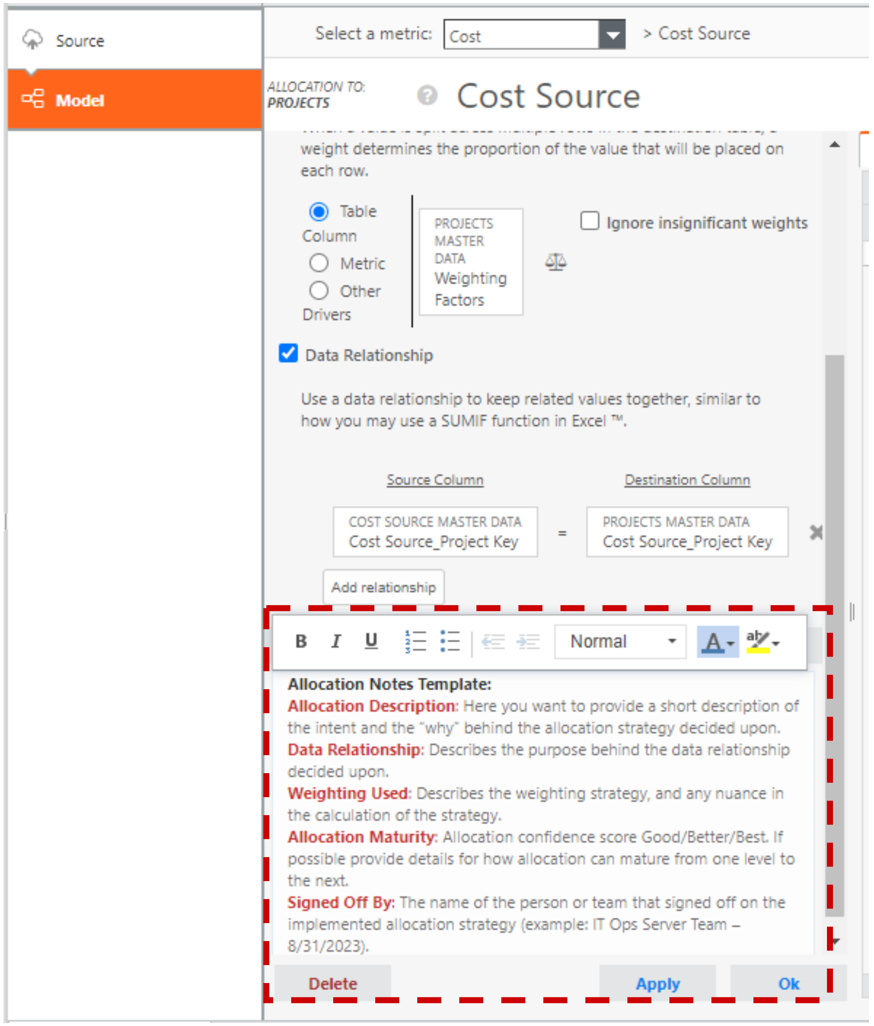
Dataset Overview: A brief outline explaining the data's content and its purpose (e.g., GL Data sourced from SAP serving as the reference for the IT Expense Base, as supplied by IT Finance).

Allocation Documentation - Template

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).

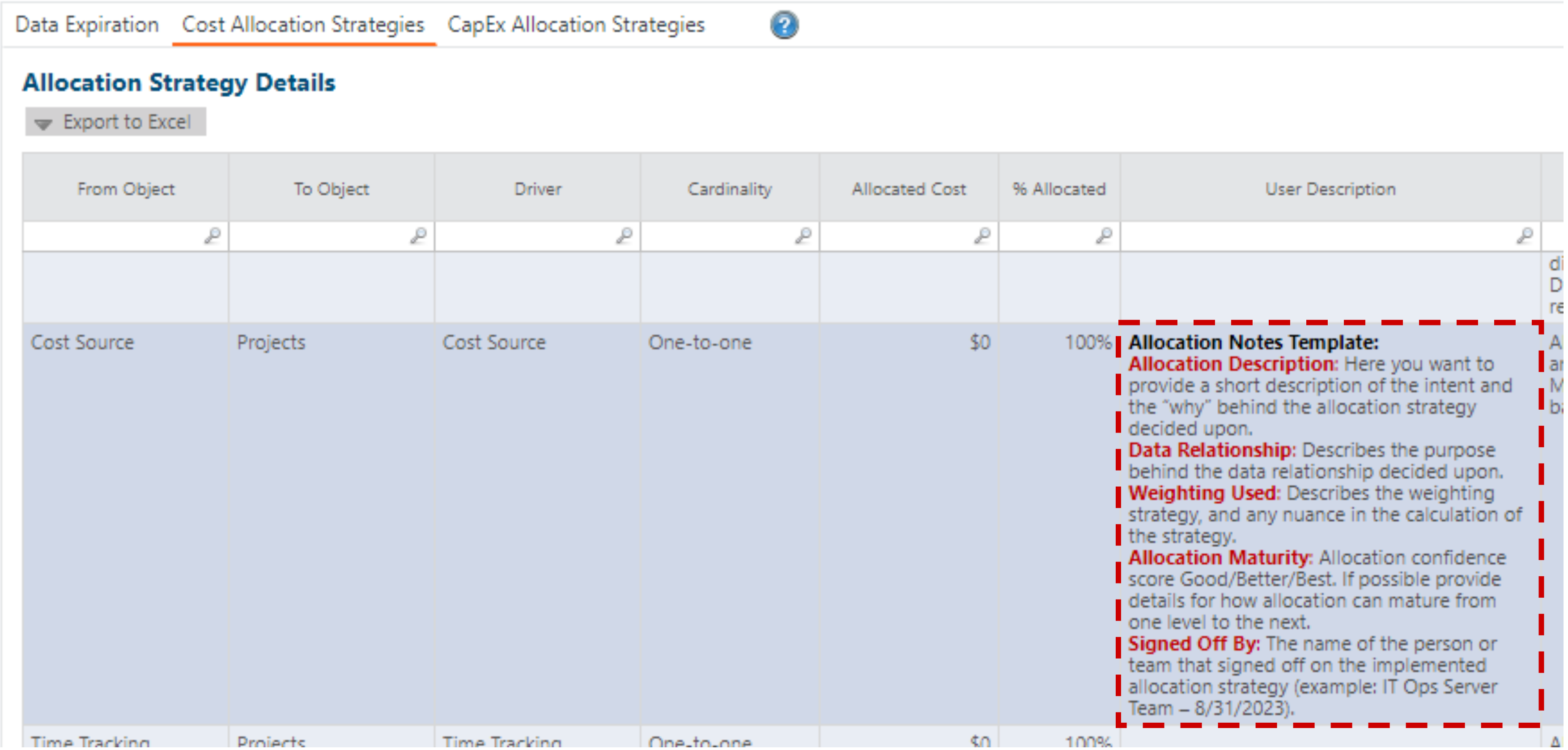
Allocation Documentation – Adding Your Notes



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

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.



Data Expiration | Cost Allocation Strategies | CapEx Allocation Strategies

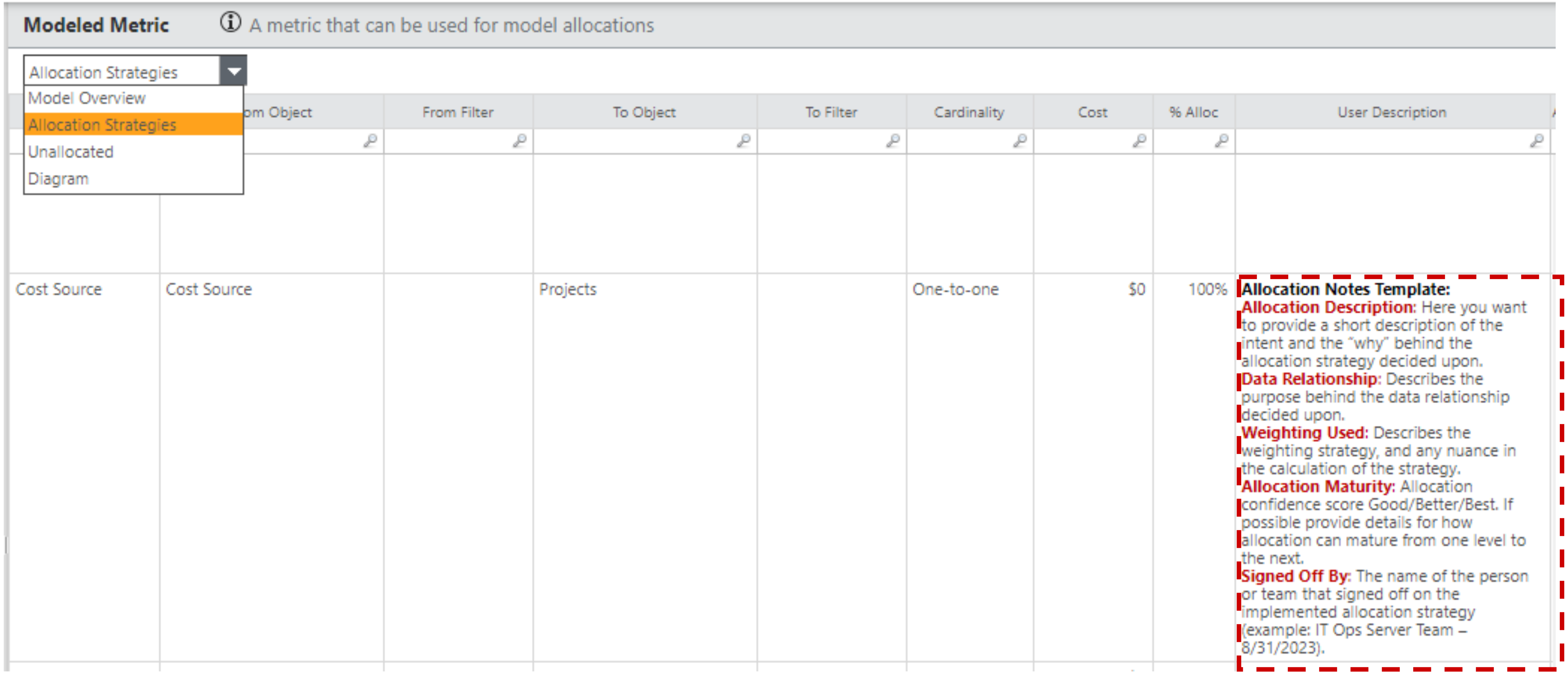
Allocation Strategy Details

Export to Excel

From Object	To Object	Driver	Cardinality	Allocated Cost	% Allocated	User Description
Cost Source	Projects	Cost Source	One-to-one	$0	100%	**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).
Time Tracking	Projects	Time Tracking	One-to-one	$0	100%	

Allocation Documentation – Metrics View

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



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- Date Started = **Today's Date**
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