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SAN DIEGO • 2023

Improving the User Experience of your Apptio Stakeholders

Your Guides:

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Part I: Introduction

Your Guides

Hollie Potts :

- Principle Strategic Advisor
- 12 years of TBM/Apptio Experience
- Travel, Reading and Teen Uber Driver

Penjor Ngudup:

- Principle Strategic Advisor
- 10 years of TBM/Apptio Experience
- Soccer, Skiing, Photography and Camping

Introductions

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

Agenda

- User Experience Best Practices
- Typical TBM User Personas
- Common Pitfalls with OOTB Apptio
- Security Configuration
- Useful Customizations
- Reporting Optimization

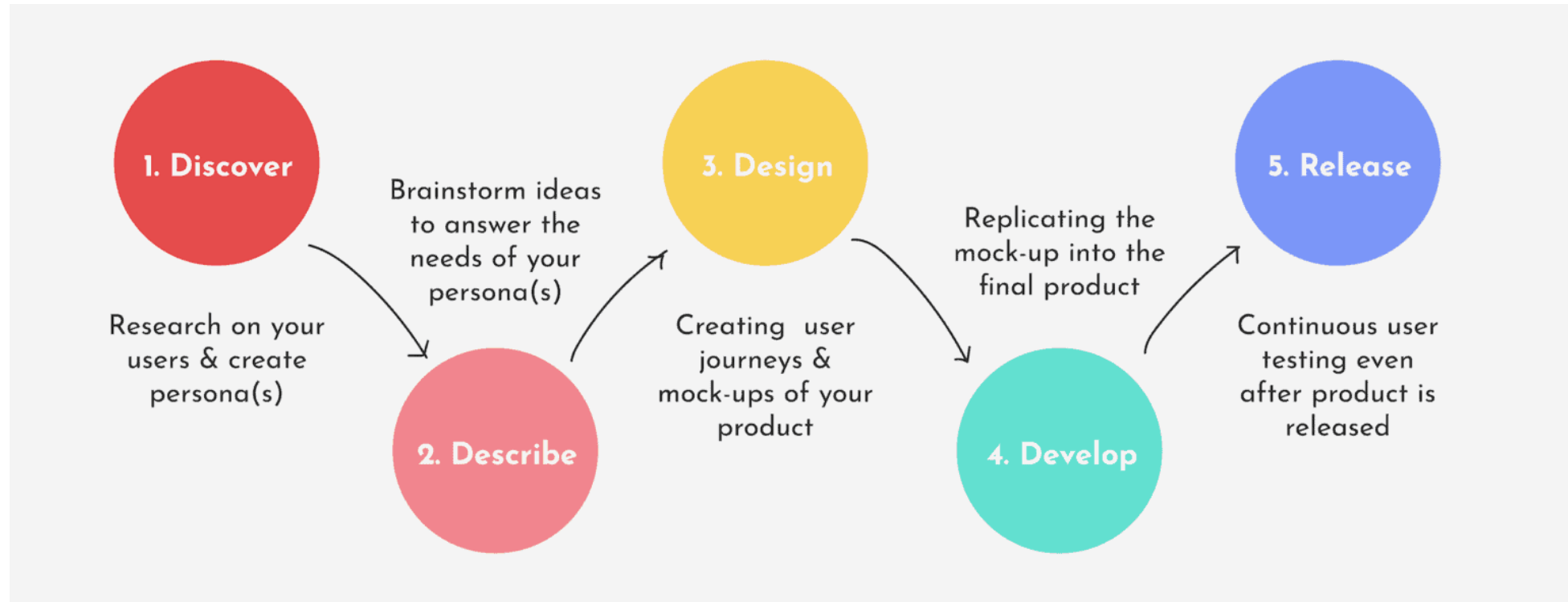
Part 2: User Experience Best Practices

What is User Experience?

- ISO 9241 defines user experience (UX) as a “user’s perceptions and responses that result from the use and/or anticipated use of a system, product or service”



User Experience Design Process





User Experience Design Guidelines

- Simple and Intuitive
- Engaging
- Efficient
- Consistency

How do you feel the Apptio OOTB reports meet these guidelines?

Part 3: Typical TBM Personas

Key IT Players in TBM

CIO & OCIO Staff



Make Fact-Based Decisions to Shift Run to Grow

- Optimize Run vs. Change
- Align Project Spend to Initiatives
- Drive Cost Optimization
- Align Spend to Biz Priorities

I&O Leaders (Infra Platforms)



Drive Efficiency and Demonstrate Business Alignment

- Optimize Infra TCO/Unit Costs
- Reduce Technical Debt
- Drive Use of Standard Infra
- EOL At-Risk Technologies

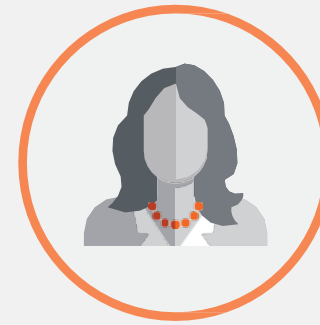
CFO of IT (IT Financial Manager)



Establish Governance and Drive IT Financial Planning

- Measure/Report Fixed/Variable
- Manage IT Budgeting Process
- Identify Cost Reduction Opps
- Manage Under/Over Recovery
- Drive Rates Management

Solution Owner



Manage and Improve Solution Value

- Manage Solution TCO
- Set/Manage Solution Rates
- Manage Build vs. Run
- Rationalize Solution Apps
- Drive Decommission Decisions

Business Relationship Managers



Align Resources to Business Priorities

- ID Biz Priorities vs. IT Spending
- Create Levers to Shape Demand
- Help Biz Optimize Consumption
- Communicate Consumption

Additional Players in TBM

Technical Architects



Drive Efficiency of Standard Configurations

- Manage TCO of Standard Builds
- Drive Refresh Decisions
- Monitor Compliance with Standards and Cost of Non-Compliance

Enterprise Architects (Business Architecture)



Align IT Plans with Business Strategy & Planning

- Define Business Capabilities
- Manage Composition of Capabilities, incl. underlying IT
- Manage Capability TCO/Consumption

Line of Business Leaders



Make Fact-Based Choices about IT Consumption & Value

- Contribute to Portfolio-Level Investment Decisions
- Make BU-Level Consumption Choices
- Evaluate IT Impact on LOB Perf

Solution Consumers



Choose IT Solutions to Improve Work and Individual Outcomes

- Choose IT solutions based on cost/value consideration
- Help optimize consumption to meet business financial goals
- Feedback on svc. performance

TBM Office Personnel



Create Transparency to Deliver Value and Shape Demand

- Maintain model and data
- Provide standard and ad-hoc TBM reporting
- Advise decision makers on using reports

Additional Players in TBM (cont.)

Corporate CFO



Create Proper Accountability Model for BUs and IT

- Align financial accounting model to cost model
- Create/manage incentives for desired outcomes
- Provide source financials

IT PMO (Project/Portfolio Mgmt.)



Provide Governance of Project Performance and Cost

- Create portfolio management governance model
- Establish project financial management discipline
- Oversee project portfolio

Tower/Resource Owners



Drive Cost-Efficiency in Service Inputs

- Benchmark tower costs
- Budget for resources required
- Determine tower rates
- Collaborate with procurement on cost-effective options

Vendor/Category Managers



Align Vendor Spending and Performance to Business Priorities

- Monitor/manage vendor spend
- Establish vendor categorization and governance
- Align vendor spending to corporate priorities

Governance, Risk & Compliance



Oversee Compliance and Shape Policies to Ensure Biz Alignment

- Set policies for risk
- Articulate risk vs. cost tradeoffs
- Measure corporate risk spending/resources
- Evaluate mitigation options

Discussion

- Any examples of dashboards you've built specifically for any of these personas
- How do you engage with your stakeholders to find out what they need/want?
- Does anyone have an engagement success story they would be willing to share?



Part 4: Common Pitfalls with OOTB Apptio Reports

Common Challenges with Apptio OOTB Reports

- Missing data will impact quality of OOTB reports
- Too many reports with similar views
 - But reporting from different layers of the model
- Default KPI's may not show financial metrics that are familiar to users
 - KPI's using labels not familiar within the organization
- Too many drill paths, 3-4 layers of drills
- YTD reports drilling to MTD reports
 - Very common to prevent long calc times
 - Inconsistent user experience

Discussion

How have the OOTB reports worked for your organizations?

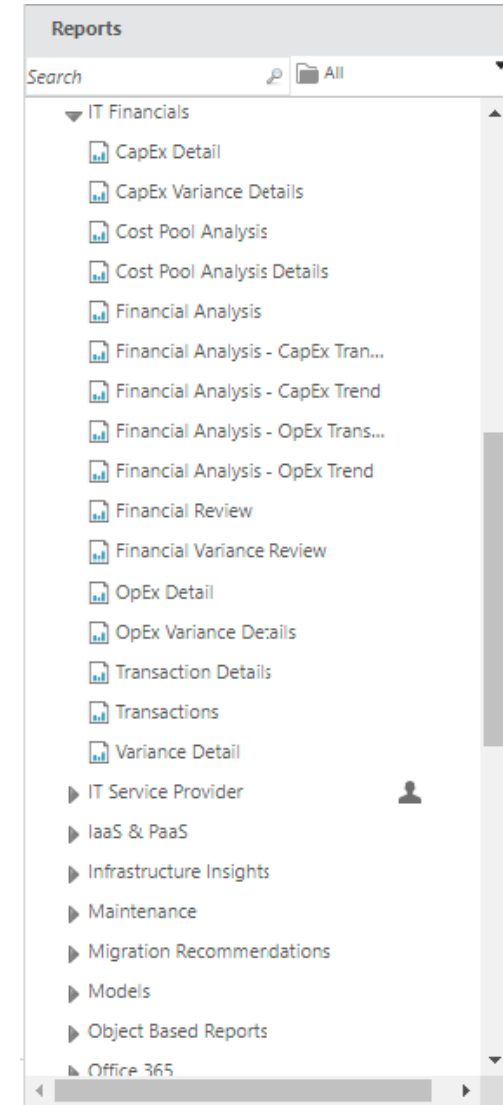
Does your organization compare Apptio to data visualization tools like Tableau and PowerBI?

Part 5: Useful Customizations

Customizations will happen and need to happen to meet use cases and provide value

It's OK to customize Apptio OOTB reports

- Too many OOTB reports manage
- Most organizations focus on a few specific use cases
- OOTB reports can be overwhelming
 - Cover a wide range of uses cases
 - Only a few components within a report may be useful
 - Multiple drills are required to answer questions
- OOTB reports don't resonate with the organization
- Quality control
 - Many broken charts and graphs
 - Inconsistent naming of columns/charts/ etc.



Custom Reports = Value

- Show value, quickly!
 - Simple, direct, clean reports
- Build relationships across the organization
- Get buy in (look beyond OOTB reports)
 - Create reports in Apptio to help save time for other personas
- Get users logging into Apptio more often

Part 6: Security Configuration

Control data visibility or report access to specific information within reporting and studio.

Report Permissions & Visibility

- Permissions
 - Simple solution to control report access leveraging OOTB user roles or custom roles
 - Easiest to implement and manage
- Visibility
 - Advanced solution the control component level access within the report
- Customized reports, will affect content upgrades
 - But it isn't very difficult to troubleshoot/manage
 - Judgement decision based on frequency of content upgrades
 - Value Now vs Upgrade Conflict
- No data level control

Report Security and Visibility - Examples

The screenshot shows the 'Build' toolbar of the Apptio report editor. The 'Permissions' icon is highlighted in yellow. Below the toolbar, the report title 'IT Financials' is visible. A 'GLOBAL FILTERS' dropdown shows 'Owner' with 'No Filter Applied'. The main report content displays 'OpEx' and 'CapEx YTD' with values of '\$0 0% Even' and 'CapEx Budget YTD: \$0'. A 'Change Permissions' dialog box is open in the foreground, allowing users to select who can view the report.

Change Permissions

Viewable By:

- Everyone
- Only Me
- Selected Roles

OK Cancel

This screenshot shows a more complex report layout in the Apptio report editor. The 'Permissions' icon is again highlighted. The report title is 'APPTIO IT Financials'. There are two 'GLOBAL FILTERS' dropdowns: 'Owner' (No Filter Applied) and 'Cost Center Owner' (No Filter Applied). The report content shows three columns for 'OpEx YTD' and 'CapEx YTD', all with values of '\$0 0% Even'. Below this, there are tabs for 'Current Month', 'Quarter to Date', and 'Year to Date'. A 'QTD OpEx Budget Variance by:' section has a dropdown set to 'Cost Pool' and a warning icon with the text 'No data available'. A 'Report Component Visibility' dialog box is open, allowing users to define conditions for when a report component should be visible.

Report Component Visibility

Show Component Only If

- User's current role is
- Dynamic text does not evaluate to "hidden"

OK Cancel

Row Level Security

- Provides data security for each row of data
 - Report layer
 - TBM Studio/datasets (if they have access to studio)
 - Best solution if full control over content is necessary
- Primary Use cases are for Business Owners or CC Owners only to see their data.
 - Personalized reporting without customizing
 - Most commonly used in Labor reporting
- BEWARE! If you have a report that drills thru to lower levels of the model. RLS only works on the top object.

Row Level Security - Setup

Date Range: April FY2023 | Environment: In Development

Export | 3s | Recommendations

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

Project Explorer

Tables

Search: All

- General
 - Row Level Security Demo**

Table Final processed table

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

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


Row Level Security - Setup


Source


Upload


Add Step


Table



Append
Add rows from other tables



Date Partition
Spread this table across months



Filter
Conditionally remove rows



Flatten Hierarchy
Convert parent/child columns



Formulas
Create or change columns



Group
Consolidate multiple rows together



Hide and Rename
Hide and rename columns



Join
Add columns from other tables



Map Columns
Map columns to a master data set



Model
Allocate costs and other values.


Pivot
Convert rows into columns


Remove Duplicates
Select the best matching row


Row-Level Security
Specify a per-user security filter on a table of data


Unpivot
Collapse columns into rows


Validation
Define validation rules for the table

Row-Level Security Specify a per-user security filter on a table of data

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

...ter Data.Cost Center intersects Per Cost Center Cost Center where user is User ID

OR

...Master Data.IsAdmin intersects Admins IsAdmin where user is Admins

Add condition

Enter username to preview Row-Level Security:

Cost Source Master Data.Cost Center

CC-200
CC-210
CC-220
CC-200
CC-210
CC-220
CC-200
CC-210

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RLS vs Roles and Visibility

- Custom Roles restrict access by environments and applications, but Row Level Security provides the most control over content
- Report Visibility by roles is easier to implement but requires customizing reports and doesn't give the admin control over specific data items.
- Tailor CT reporting to work for all levels of the organization and use RLS to ensure data is filtered appropriately within each report for each user
- If needed, RLS allows for the creation of “admin” users that can view everything without restriction
- If you have a report that drills thru to lower levels of the model. RLS only works on the top object.
- Reports can be locked down within CT by roles, allowing admins to restrict access to unfinished reports, while allowing access to those that are completed and ready to be leveraged by users

Questions?



Surveys

Please take a few moments to fill out the class survey.
Your feedback is extremely important for future events.



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- 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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