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The Art of the Possible with Editable Tables and Reports
Your Guides:
Penjor Ngudup and Rob DeLeo

Your Guides

Rob DeLeo :

- Senior Consultant
- 7 years of TBM/Apptio Experience
- Basketball, Softball, Dogs and Fantasy Sports

Penjor Ngudup:

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

Agenda

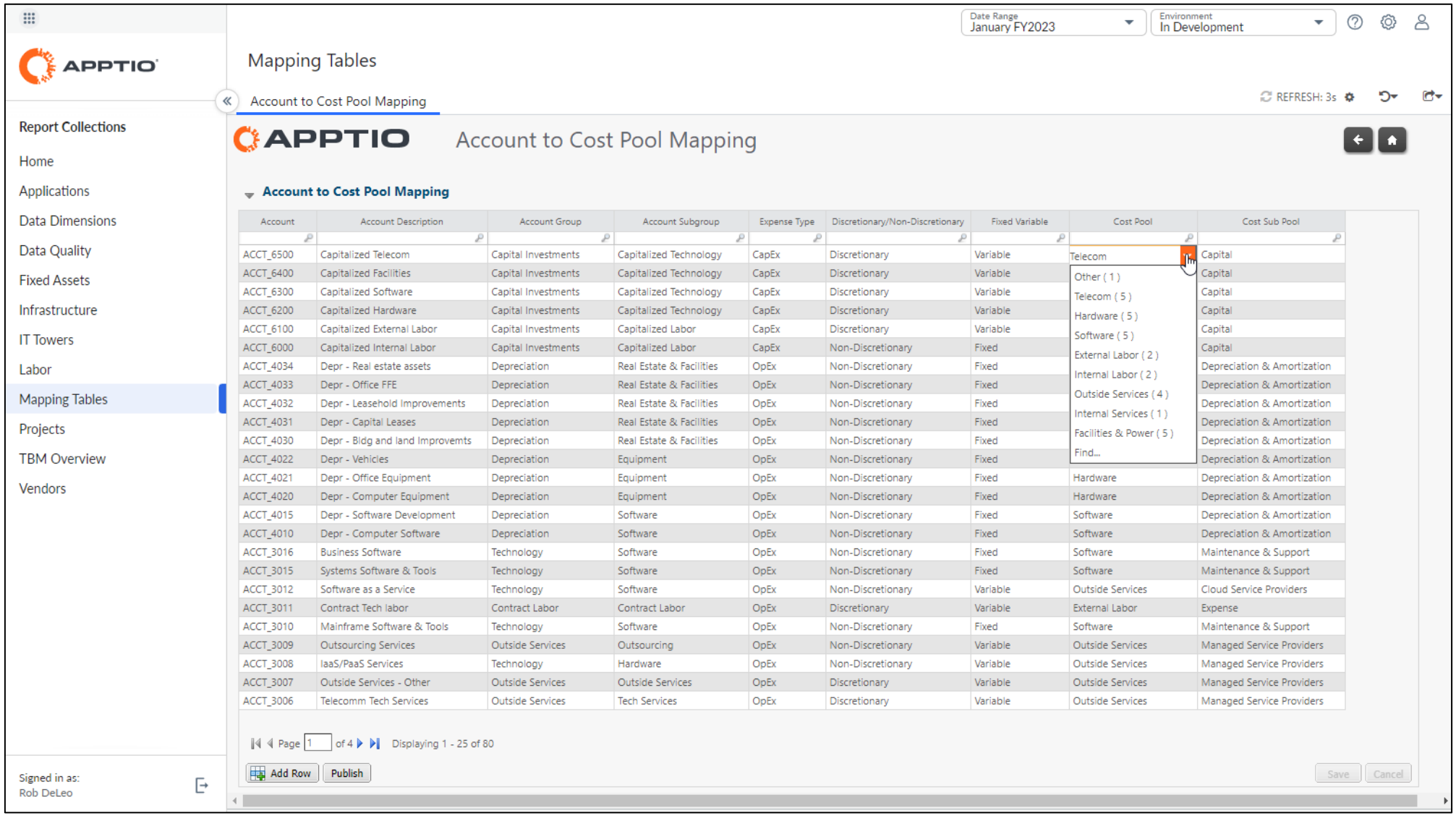
- What are Editable Tables?
- Use Cases for Editable Tables
- Examples of Editable Tables
- Demo of Functionality of Editable Tables

Part I:
What are Editable Tables

What are Editable Tables?

- Tables configured in TBM Studio and published onto a reporting surface allowing end users to be able to add/edit data in a controlled format without access to Studio.

Editable Table - Example



Benefits of Editable Tables

- Eliminates the Upload step for tables where Apptio is the system of record such as mapping tables
- Data quality control
  - Ability to track changes
  - Improve verification and acceptance
  - Drive accountability and adoption
- Minimize data entry
  - Keep data fresh
- Share mapping responsibilities
  - Empower data owners to maintain their information
- Create Reports to share with end users

Part II:
Use Cases

Quick Poll

- Have you used editable tables in your TBM solution?
- What use cases have you rolled out using editable tables?

Food & Beverage Co. – Mapping file Actuals to Budget

- Problem: Need to do vendor/contract level variance analysis monthly between budget/forecast and actuals, but actuals did not match budget descriptions

- Solution: Created lookup tables to map by PO, Vendor, or accrual descriptions where possible then used editable table to map outliers each month

- Outcome: Original process was manual and required over 2 days to complete, but new process could be completed in 30 minutes

Consumer Products Company – OpEx Tail Tracking

- Problem: Manual excel file maintained to track project OpEx spend that would need to move to run budget. Data quality issues due to manual entry of data. Time consuming to gather all data needed. Reporting was manual and not visible to everyone.

- Solution: Created Editable table with necessary data columns. Used dropdowns and lookups to limit data entry requirements and maintain data quality. Created custom report collection to allow end users to review and analyze data.

- Outcome: Significant increase in data quality issues, and visibility to the information. During budget process, data was able to be added into IT Planning budget quickly and easily.

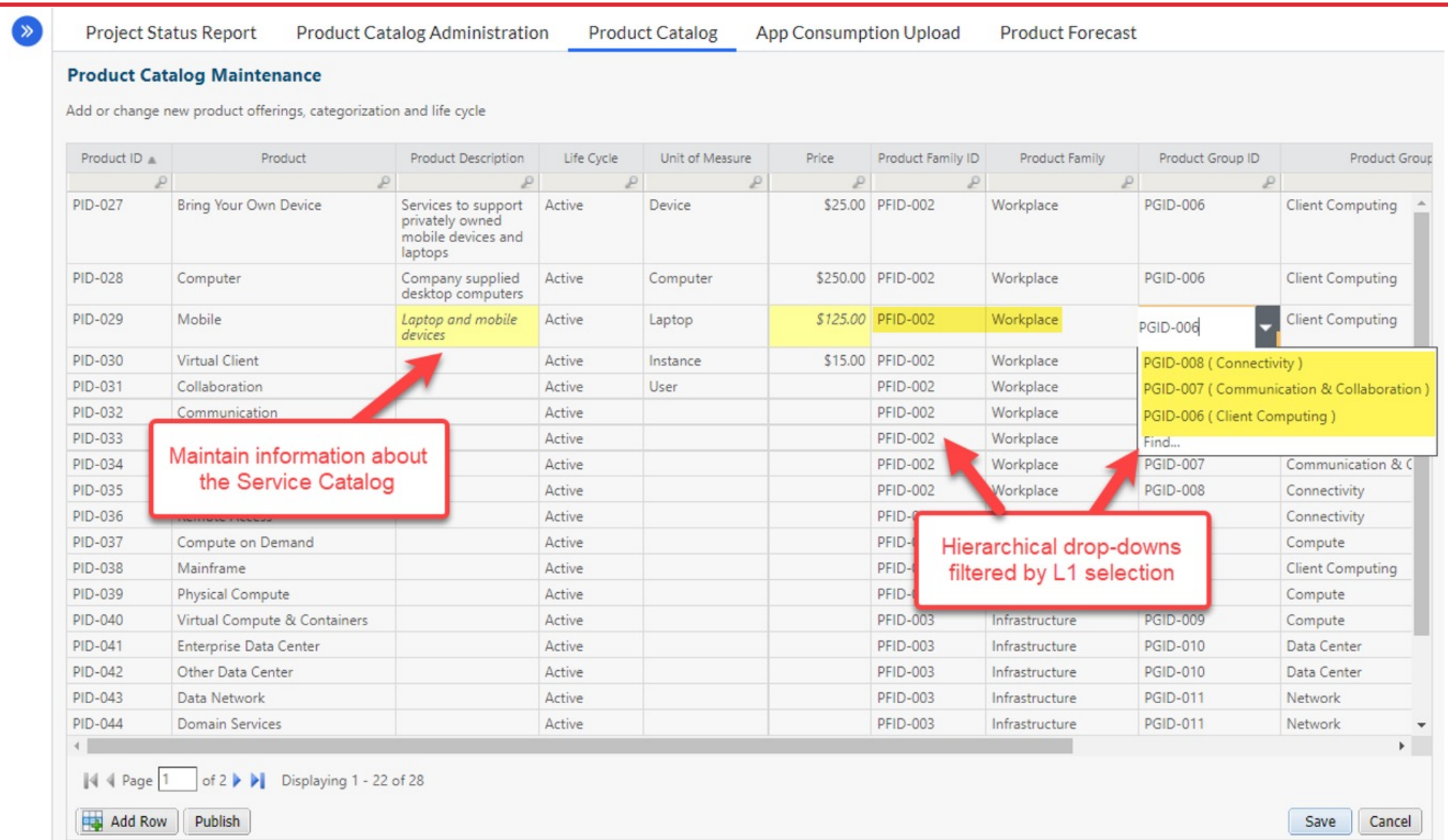
Data Cleansing or Enrichment

- Problem: Gaps in raw data, inability to update source data (even for SMEs).
  Example: Missing vendor information, product/asset metadata in CMDB

- Solution: Thru editable tables, SMEs can update missing fields with the relevant information.

- Outcome: Improved report usability and value due to the elimination of blank values, better cost allocation due to more complete data.

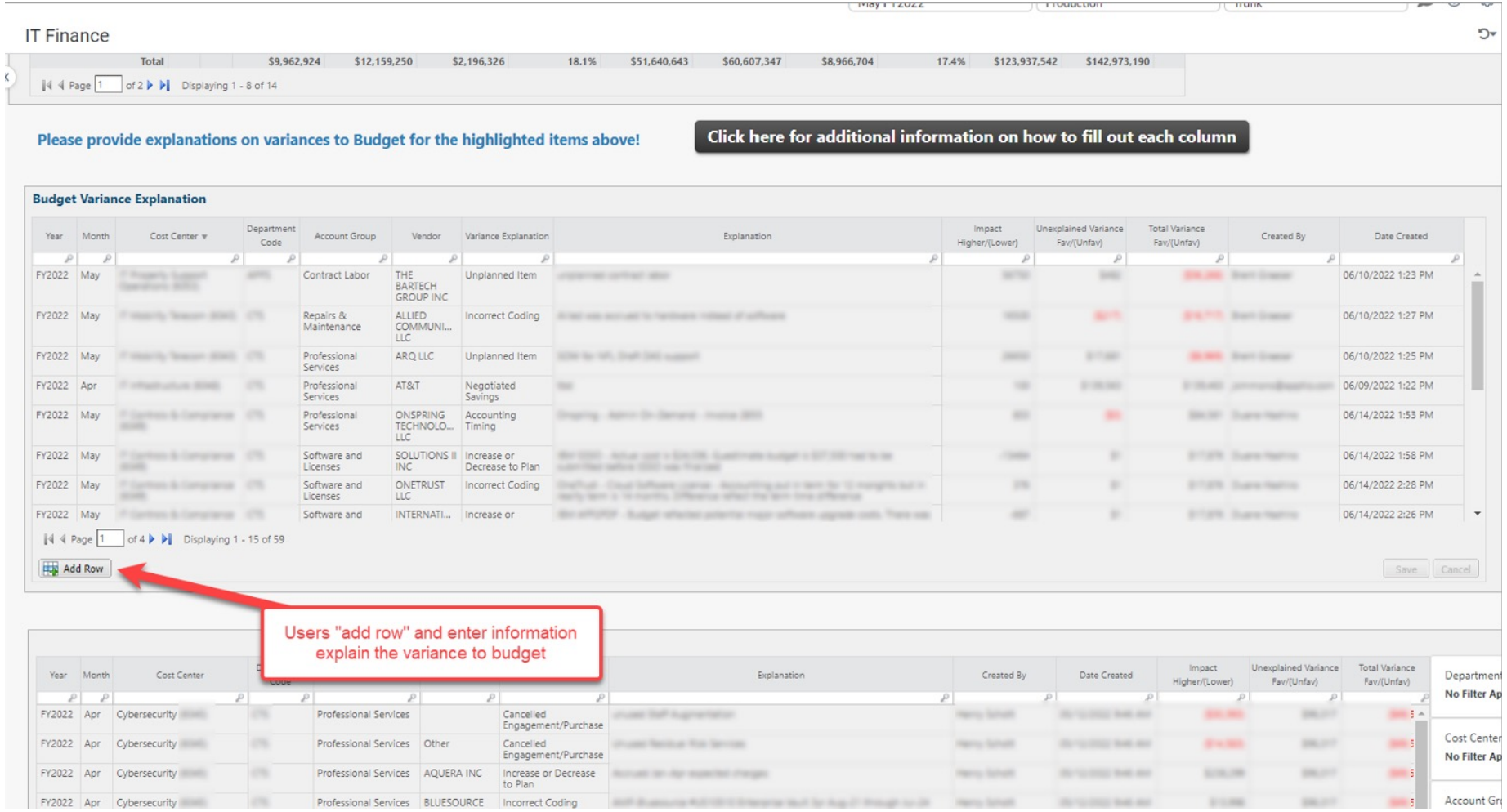
Data Cleansing or Enrichment – Example



Product ID	Product	Product Description	Life Cycle	Unit of Measure	Price	Product Family ID	Product Family	Product Group ID	Product Group
PID-027	Bring Your Own Device	Services to support privately owned mobile devices and laptops	Active	Device	$25.00	PFID-002	Workplace	PGID-006	Client Computing
PID-028	Computer	Company supplied desktop computers	Active	Computer	$250.00	PFID-002	Workplace	PGID-006	Client Computing
PID-029	Mobile	*Laptop and mobile devices*	Active	Laptop	*$125.00*	PFID-002	Workplace	PGID-006	Client Computing
PID-030	Virtual Client		Active	Instance	$15.00	PFID-002	Workplace		
PID-031	Collaboration		Active	User		PFID-002	Workplace		
PID-032	Communication		Active			PFID-002	Workplace		
PID-033			Active			PFID-002	Workplace		
PID-034			Active			PFID-002	Workplace	PGID-007	Communication & C
PID-035			Active			PFID-002	Workplace	PGID-008	Connectivity
PID-036			Active			PFID-			Connectivity
PID-037	Compute on Demand		Active			PFID-			Compute
PID-038	Mainframe		Active			PFID-			Client Computing
PID-039	Physical Compute		Active			PFID-			Compute
PID-040	Virtual Compute & Containers		Active			PFID-003	Infrastructure	PGID-009	Compute
PID-041	Enterprise Data Center		Active			PFID-003	Infrastructure	PGID-010	Data Center
PID-042	Other Data Center		Active			PFID-003	Infrastructure	PGID-010	Data Center
PID-043	Data Network		Active			PFID-003	Infrastructure	PGID-011	Network
PID-044	Domain Services		Active			PFID-003	Infrastructure	PGID-011	Network

Variance Commentary

- Allow Cost Center owners to enter explanations for variances or outliers



Discussion

- What else do you think editable tables could be used for?

Part IV:
Demo of Editable Tables

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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- Training classes = **Technical**
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