



regoUniversity

SAN DIEGO • 2023

# What's New in ApptioOne for 2023

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# Part I: Introduction

# Introductions

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

# Agenda

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- Where to find New releases
  - Lineage
  - Unused Documents
  - Default Calc Prioritization
  - Report Entity Search
  - Late File Upload Notification
  - Refresh Delay
  - Custom Color Palettes
- Demo
- Q&A



# Where to find Apptio Updates?

- Apptio Always posts all their release notes in their Apptio Help Center
- <https://help.apptio.com/en-us/studio/whats-new.htm>
- Make sure you know what version you and your products are on
- Content and System Upgrades

# Quick Poll

- What's the best new feature (released in the past year) that you're taking advantage of?
- How has it helped?



# Enable Beta Features

The screenshot displays the Rego software interface. The top navigation bar is divided into two tabs: 'Project' and 'Build'. Below the tabs, there are several groups of icons representing different functionalities: Project Settings, Calculation Settings, Errors, Unused Documents, Components, Report Collections, Report Search, Report PDFs, Data Freshness, Current Active Users, Manage (with sub-options: Create Branch, Retire Branch, Tag Project), and Manage Branches. On the right side, there are icons for 'Enable Features', 'New Domain', and 'Domain Settings'. The 'Enable Features' dropdown menu is open, showing a list of 16 beta features, all of which are checked with a blue checkmark.

**Project** **Build**

Project Settings Calculation Settings Errors Unused Documents Components Report Collections Report Search Report PDFs Data Freshness

Current Active Users Manage (Create Branch, Retire Branch, Tag Project) Manage Branches

Enable Features New Domain Domain Settings

**Enable Features**

- Show Currently Active Users
- Allow adding Notes component to Report
- Report Level Excel Export
- Show Table Upload Report Component
- Defer Refresh of Report Components
- Allow comments for Cost Transparency
- Enable Experimental Recommendations Workflows
- Initial Page Load Performance Improvement
- Show Unused Documents
- Enable Validation Step in Pipeline (Beta)
- Enable Validation Step for Editable Table (Beta)
- Show Lineage in Project Explorer
- Project Calc Management
- Report Search
- Enable Color Enhancement

# Lineage

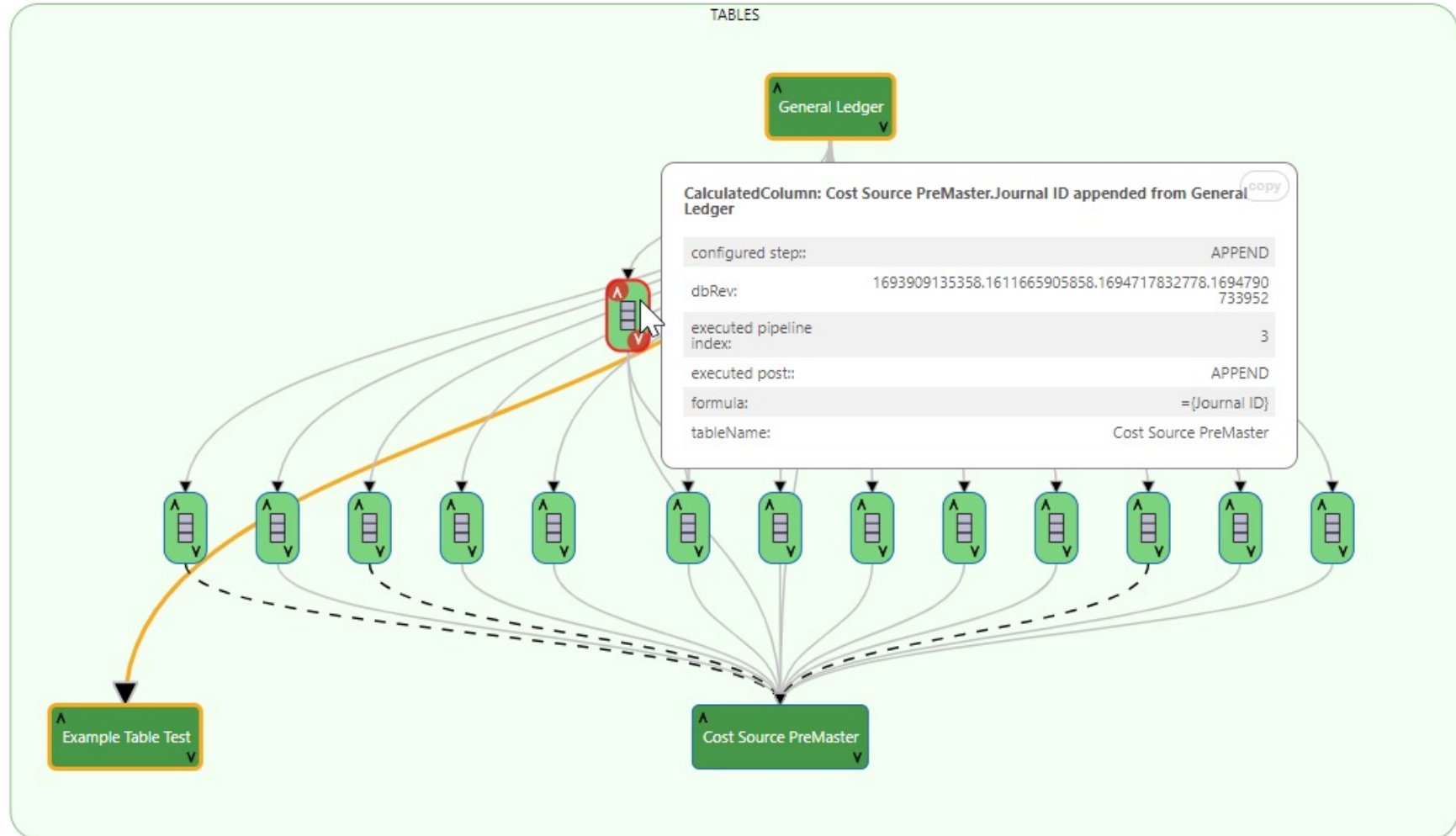
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- [Documentation](#)
- Purpose
  - Identify relationships within your environment related to columns, metrics, tables, reports, and report components.
- Use Cases
  - Review impact of changes to data
  - Assist in removing configuration
  - Understand where data is being used

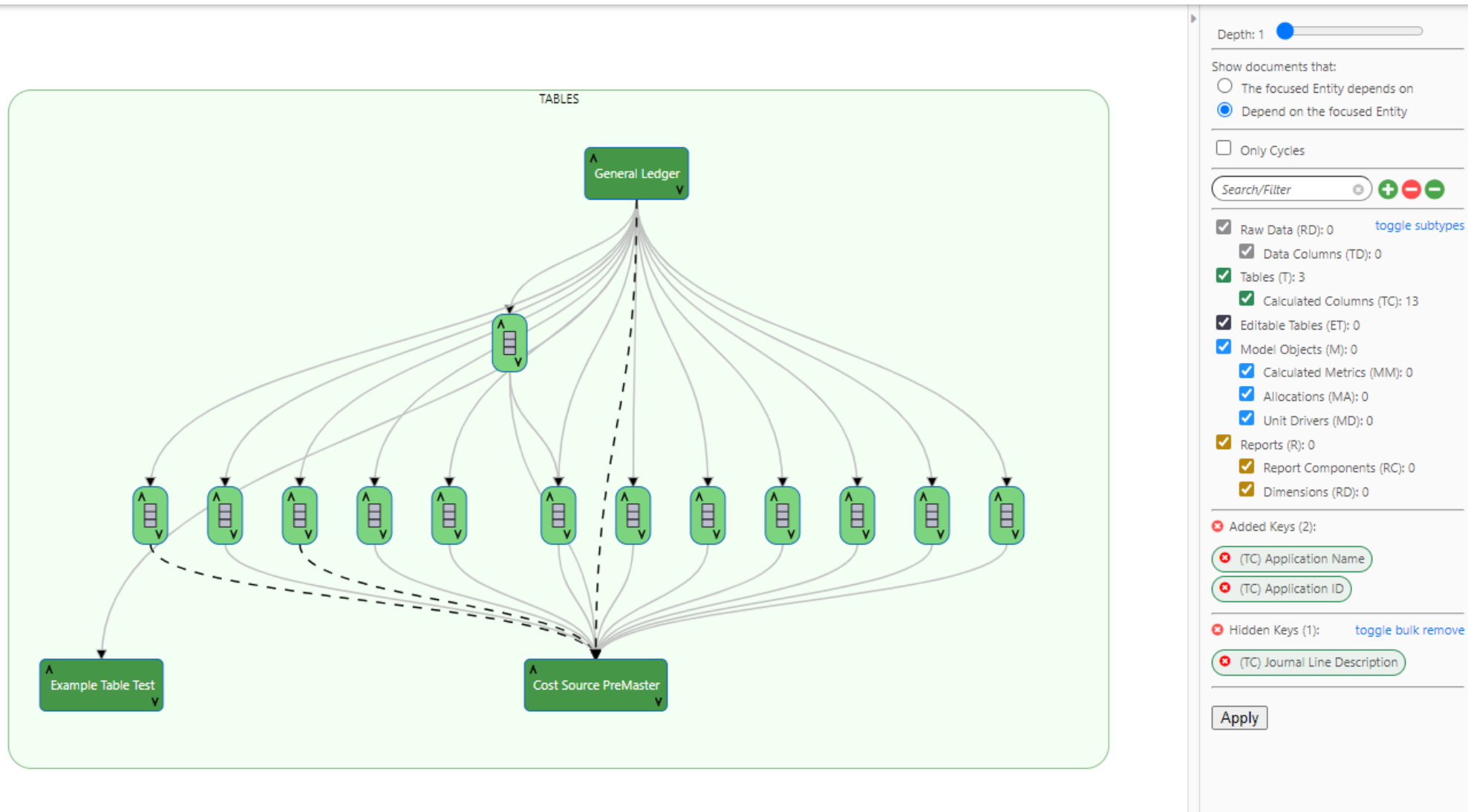


# Lineage

Focus: General Ledger (Table)



# Lineage



# Unused Documents

- [Documentation](#)
- Purpose
  - To identify unused documents within the environment to assist with improving performance
- Use Case
  - Routine environment maintenance to safely remove unused documents
  - Identify documents with no dependencies and validate dependency removal

Document ▲	Type	Source
ATUM Cost Classification Reference	Table	User Introduced
Cost Center Owners ET Test	Table	User Introduced
Data Expiration Test	Table	User Introduced
ITP Cost Object Permissions	Table	User Introduced
ITP Labor External Line Items	Table	User Introduced
ITP Labor Tab Load	Table	User Introduced
ITPF Forecast Append	Table	User Introduced
OpEx CapEx Classification Reference	Table	User Introduced
Project Cost Test	CalculatedMetric	User Introduced
Rules Org TM	Table	User Introduced
Testing Custom Metric	CalculatedMetric	User Introduced
Testing Project Activity Internal	Table	User Introduced

# Calc Prioritization

- [Documentation](#)
- Purpose
  - Allow administrators to manage the prioritization of calculations within their environment
- Use Case
  - Multiple projects within environment with competing calculations
  - Understand calculations within entire environment
  - Troubleshoot calculations for a promotion release

Project Calculation Management

CALC SETTINGS DEV QUEUE STAGING QUEUE

Search... Enable All Disable All

Domain	Project	Branch	Priority	Priority Change Reason	Disable/Enable Staging Calc	Calc Change Reason
regoconsultingp...			50		<input checked="" type="checkbox"/>	
regoconsultingp...			50		<input checked="" type="checkbox"/>	
regoconsultingp...			50		<input checked="" type="checkbox"/>	
regoconsultingp...			50		<input checked="" type="checkbox"/>	
regoconsultingp...			50		<input checked="" type="checkbox"/>	

Reason\* Submit

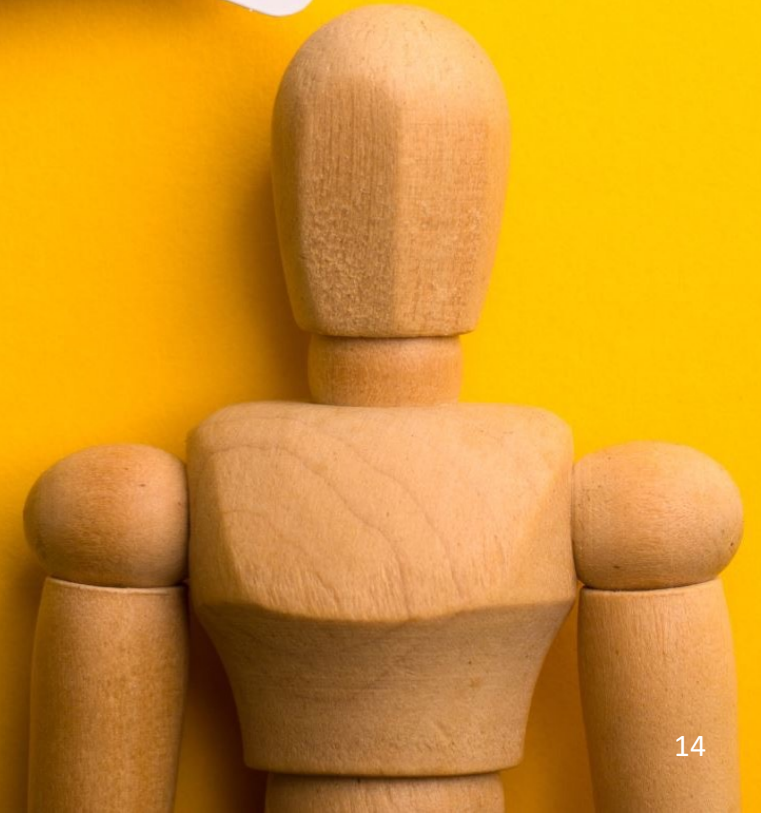
# Discussion

- What is a feature that you would like to use, but needs a small enhancement to make it work for you?



# Quick Poll

- Who here has looked at the Ideas for Product Enhancements on Community?
- Anyone submit any ideas there?



# Report Entity Search

- [Documentation](#)
- Purpose
  - Allow administrators to search across reports to locate a report, report component, or data being used within a report
- Use Case
  - Renaming a column that requires updates across all reports using the column
  - Identify all reports using a particular field and location of the field



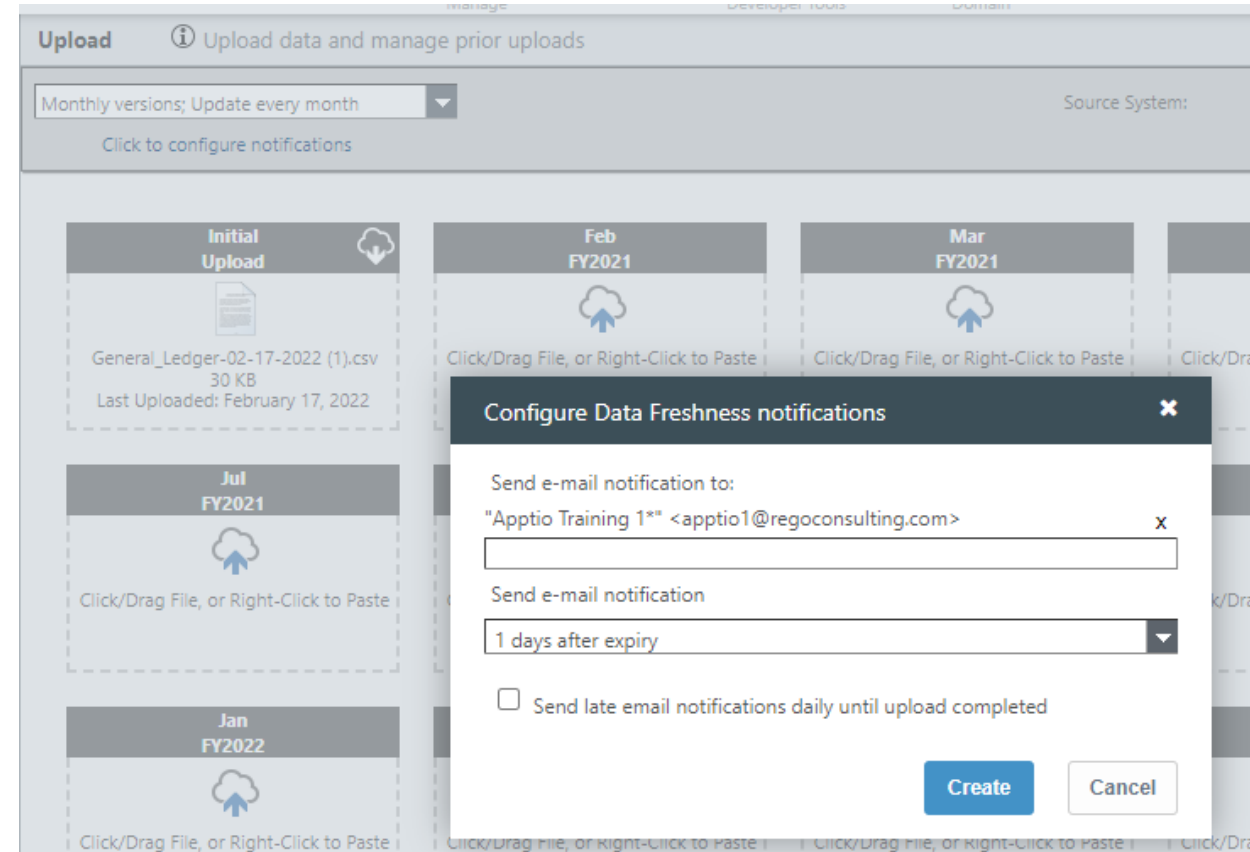
# Report Entity Search

Report Name	Component Type	Field	Match	Component ID	Component Position
<a href="#">Data Quality - Financials</a>	Ad Hoc Component	Dimension Display Name	Cost Pool	3265	28,1100,1200,327
<a href="#">Data Quality - Financials</a>	Ad Hoc Component	Column Dimension	Cost Source Master Data.Cost Pool	3265	28,1100,1200,327
<a href="#">Depreciation Mapped to ATUM Sub Tower Detail</a>	Ad Hoc Component	Column Dimension	IT Spend: Cost Pool Benchmarks	5	54,218,488,506
<a href="#">OpEx Cost Mapped to ATUM Sub Towers Detail</a>	Ad Hoc Component	Column Dimension	IT Spend: Cost Pool Benchmarks	5	39,233,517,419
<a href="#">Full Time Equivalent Headcount Mapped to ATUM Sub Tower Detail</a>	Ad Hoc Component	Column Dimension	IT Spend: Cost Pool Benchmarks	5	53,242,498,408
<a href="#">ATUM Unit of Measure populated Detail</a>	Ad Hoc Component	Column Dimension	IT Spend: Cost Pool Benchmarks	6	47,237,502,350
<a href="#">OpEx Cost Mapped to ATUM Towers Detail</a>	Ad Hoc Component	Column Dimension	IT Spend: Cost Pool Benchmarks	5	44,276,635,333
<a href="#">IT Resource Sub Tower Volumes Detail</a>	Ad Hoc Component	Column Dimension	IT Spend: Cost Pool Benchmarks	5	49,220,437,425
<a href="#">CT Quality - Telecom to Communications</a>	Ad Hoc Component	Column Dimension	Cost Pool	3341	24,595,874,280
<a href="#">CT Quality - Total IT Spend</a>	Ad Hoc Component	Column Dimension	Cost Pool	26	188,645,570,100
<a href="#">ITP - Financial Review</a>	Ad Hoc Component	Column Dimension	Cost Pool	3397	163,260,470,503
<a href="#">ITP - Financial Review</a>	Ad Hoc Component	Column Dimension	Cost Pool	3456	513,203,470,490
<a href="#">Financial Analysis</a>	Ad Hoc Component	Column Dimension	Cost Pool	4249	639,27,600,608
<a href="#">Financial Analysis</a>	Ad Hoc Component	Column Dimension	Cost Pool	4219	15,27,600,608
<a href="#">Labor - Staffing and Rate Details</a>	Ad Hoc Component	Dimension Display Name	Cost Pool	119	20,25,1025,342
<a href="#">Labor - Staffing and Rate Details</a>	Ad Hoc Component	Column Dimension	Labor Master Data.Cost Pool	119	20,25,1025,342
<a href="#">IT Sub Tower - Detail</a>	Ad Hoc Component	Component Title	OpEx by Cost Pool (Current Month)	4828	5,20,330,240
<a href="#">IT Sub Tower - Detail</a>	Ad Hoc Component	Column Dimension	Cost Pool	4828	5,20,330,240
<a href="#">Project Details</a>	Ad Hoc Component	Column Dimension	Cost Pool	3515	10,10,1200,307
<a href="#">Project Details</a>	Ad Hoc Component	Column Dimension	Cost Pool	3818	10,300,1207,177
<a href="#">Infra - Cost Pool Details</a>		Report Display Name	Infra - Cost Pool Details		
<a href="#">Infra - Cost Pool Details</a>		Report Title	Infra - Cost Pool Details		
<a href="#">App - Detail - Cost Pools</a>		Report Display Name	App - Detail - Cost Pools		
<a href="#">App - Detail - Cost Pools</a>		Report Title	App - Detail - Cost Pools		
<a href="#">App Review</a>	Ad Hoc Component	Column Dimension	Cost Pool	102	158,1587,1265,180
<a href="#">App Review</a>	Ad Hoc Component	Column Dimension	Cost Pool	118	160,1400,1252,204
<a href="#">Eric S Test Drill</a>	Ad Hoc Component	Dimension Display Name	Cost Pool	1	0,0,1141,395
<a href="#">Eric S Test Drill</a>	Ad Hoc Component	Column Dimension	Cost Source Master Data.Cost Pool	1	0,0,1141,395



# Late File Upload Notification

- [Documentation](#)
- Purpose
  - To assist with reminding data owners to provide required data to maintain the model
- Use Case
  - During monthly data refreshes for manual uploaded files



# Refresh Delay

- [Documentation](#)
- Purpose
  - Allow users to make selections in complex reports and refresh report with selections all at once
- Use Case
  - When there are complex reports with multiple slicers, column pickers and other components that influence the look of the visualization. Manual refresh allows the user to refresh after all selections are made to prevent multiple calculations in the report



# Refresh Delay

## Labor

Labor Review Labor Analysis ITP - Labor Review



### Labor Analysis

Region Hierarchy No Filter Applied

GLOBAL FILTERS Cost Center and ID No Filter Applied

GLOBAL FILTERS Cost Center Owner No Filter Applied

GLOBAL FILTERS Owner No Filter Applied

REFRESH

REFRESH DELAY: 3s

MANUAL REFRESH

#### Labor Interactive Analysis

Cost Center and Name	Role Type	Trend	Headcount
Apps - Back Office (CC-200)	Business Analyst	▬▬▬	2
Apps - Back Office (CC-200)	QA Engr	▬▬▬	6
Apps - Back Office (CC-200)	Software Engr	▬▬▬	8
Apps - Back Office (CC-200)	Dev Mgr	▬▬▬	1
Apps - Mfg & Dist (CC-210)	Software Engr	▬▬▬	13
Apps - Mfg & Dist (CC-210)	QA Engr	▬▬▬	8
Apps - Mfg & Dist (CC-210)	Dev Mgr	▬▬▬	2
Apps - Mfg & Dist (CC-210)	Business Analyst	▬▬▬	3
Apps - Sales & Ops (CC-220)	QA Engr	▬▬▬	6
Apps - Sales & Ops (CC-220)	Software Engr	▬▬▬	14
Apps - Sales & Ops (CC-220)	Business Analyst	▬▬▬	3
Apps - Sales & Ops (CC-220)	Dev Mgr	▬▬▬	1
Data Center Ops (CC-320)	Ops Mgr	▬▬▬	2
Data Center Ops (CC-320)	Ops Tech	▬▬▬	6
Enterprise Compute & Storage (CC-340)	Ops Analyst	▬▬▬	4
Enterprise Compute & Storage (CC-340)	Ops Mgr	▬▬▬	3
Enterprise Compute & Storage (CC-340)	System Engr	▬▬▬	12
Field Support - EMEA (CC-365)	Ops Mgr	▬▬▬	1
Field Support - EMEA (CC-365)	Support Engr	▬▬▬	2
Field Support - NA (CC-360)	Support Engr	▬▬▬	7
Field Support - NA (CC-360)	Ops Mgr	▬▬▬	1
Network Services (CC-330)	Network Engr	▬▬▬	4
Network Services (CC-330)	Ops Mgr	▬▬▬	1
Office of the CIO (CC-390)	Admin	▬▬▬	1
Office of the CIO (CC-390)	Architect	▬▬▬	2
Office of the CIO (CC-390)	Financial Analyst	▬▬▬	3

Employee Type

No Filter Applied

Role Type

No Filter Applied

#### Additional Details

- OpEx
- OpEx Budget
- OpEx Budget Variance
- Current FY Plan
- Current FY Plan Variance
- Headcount
- Headcount Plan
- Internal Headcount
- External Headcount
- Average Rate
- Average Hourly Rate
- Compensation Type
- Employee Type
- Labor ID
- Region
- Location
- Title
- Role Type
- Vendor Name

# Refresh Delay

Analytics Text Grouping Advanced GLOBAL FILTERS GLOBAL FILTERS

Compact Slicer QuickPivot HTML Button Group Tabs Table Upload Print Layout Assign to Collection Start Date Active Master Report Visibility Permissions 3s REFRESH DELAY: 3s MANUAL REFRESH

APPTIO an IBM Company Labor Analysis

Region Hierarchy No Filter Applied Cost Center and ID No Filter Applied Cost Center Owner No Filter Applied Owner No Filter Applied

### Labor Interactive Analysis

Cost Center and Name	Location	Role Type	Trend	Headcount	Headcount Plan	Internal Headcount	External Headcount	OpEx	OpEx Budget
Apps - Back Office (CC-200)	Chicago, IL	Business Analyst	▬▬▬	2		2	0	\$0	
Apps - Back Office (CC-200)	Chicago, IL	QA Engr	▬▬▬	6		4	2	\$0	
Apps - Back Office (CC-200)	Chicago, IL	Software Engr	▬▬▬	8		8	0	\$0	
Apps - Back Office (CC-200)	Chicago, IL	Dev Mgr	▬▬▬	1		1	0	\$0	
Apps - Mfg & Dist (CC-210)	Chicago, IL	Software Engr	▬▬▬	11		11	0	\$0	
Apps - Mfg & Dist (CC-210)	Seattle, WA	QA Engr	▬▬▬	5		1	4	\$0	
Apps - Mfg & Dist (CC-210)	Seattle, WA	Software Engr	▬▬▬	2		2	0	\$0	
Apps - Mfg & Dist (CC-210)	Chicago, IL	Dev Mgr	▬▬▬	1		1	0	\$0	
Apps - Mfg & Dist (CC-210)	Chicago, IL	Business Analyst	▬▬▬	3		3	0	\$0	
Apps - Mfg & Dist (CC-210)	Seattle, WA	Dev Mgr	▬▬▬	1		1	0	\$0	
Apps - Mfg & Dist (CC-210)	Chicago, IL	QA Engr	▬▬▬	3		3	0	\$0	
Apps - Sales & Ops (CC-220)	Seattle, WA	QA Engr	▬▬▬	4		3	1	\$0	
Apps - Sales & Ops (CC-220)	Seattle, WA	Software Engr	▬▬▬	9		7	2	\$0	
Apps - Sales & Ops (CC-220)	Seattle, WA	Business Analyst	▬▬▬	3		1	2	\$0	
Apps - Sales & Ops (CC-220)	London, UK	QA Engr	▬▬▬	2		2	0	\$0	
Apps - Sales & Ops (CC-220)	London, UK	Software Engr	▬▬▬	5		5	0	\$0	
Apps - Sales & Ops (CC-220)	Seattle, WA	Dev Mgr	▬▬▬	1		1	0	\$0	
Data Center Ops (CC-320)	Boston, MA	Ops Mgr	▬▬▬	1		1	0	\$0	
Data Center Ops (CC-320)	Madrid, SPN	Ops Tech	▬▬▬	2		0	2	\$0	
Data Center Ops (CC-320)	Boston, MA	Ops Tech	▬▬▬	2		1	1	\$0	
Data Center Ops (CC-320)	San Francisco, CA	Ops Mgr	▬▬▬	1		1	0	\$0	
Data Center Ops (CC-320)	San Francisco, CA	Ops Tech	▬▬▬	2		2	0	\$0	
Enterprise Compute & Storage (CC-340)	San Francisco, CA	Ops Analyst	▬▬▬	3		1	2	\$0	
Enterprise Compute & Storage (CC-340)	Madrid, SPN	Ops Mgr	▬▬▬	1		1	0	\$0	
Enterprise Compute & Storage (CC-340)	Boston, MA	System Engr	▬▬▬	5		3	2	\$0	

Employee Type No Filter Applied

Role Type No Filter Applied

Additional Details

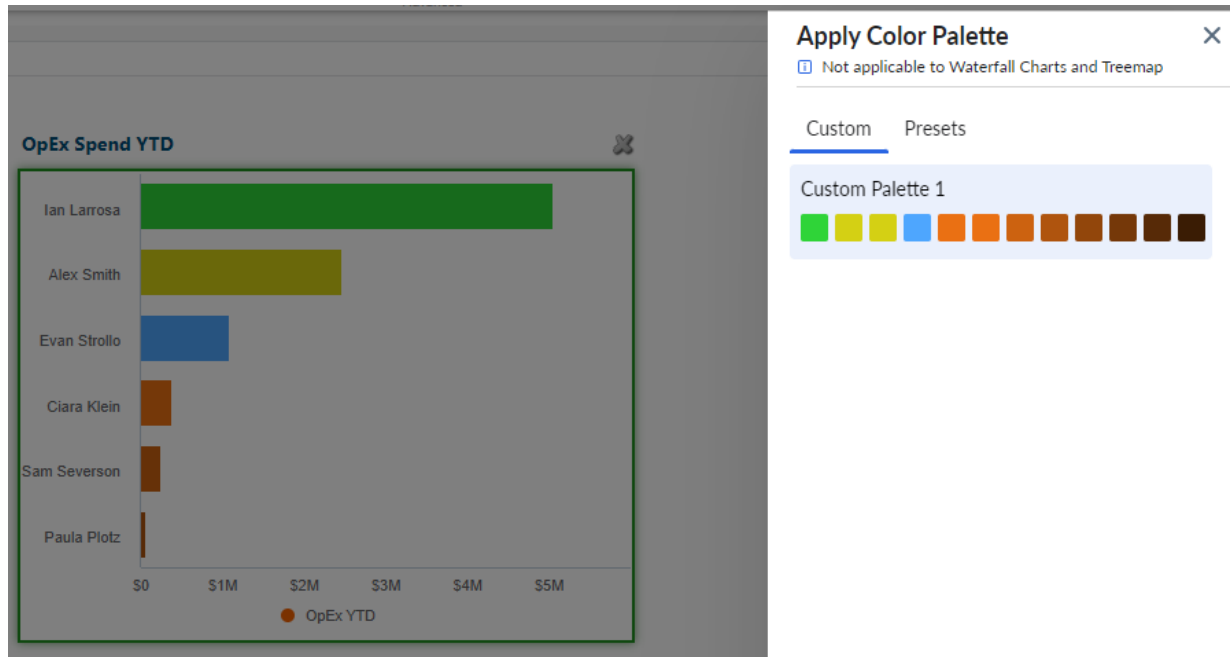
- OpEx
- OpEx Budget
- OpEx Budget Variance
- Current FY Plan
- Current FY Plan Variance
- Headcount
- Headcount Plan
- Internal Headcount
- External Headcount
- Average Rate
- Average Hourly Rate
- Compensation Type
- Employee Type
- Labor ID
- Region
- Location
- Title
- Role Type
- Vendor Name

# Custom Color Palette

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- [Documentation](#)
- Purpose
  - Allow administrators to incorporate color palettes into reporting to standardize aesthetics within reports
- Use Case
  - Aligning reports to corporate branding guidelines to provide users a better experience

# Custom Color Palette



The "Custom Color Palette" dialog box allows users to create a custom color scheme. It includes a color picker, a hex code input field (currently showing #BD9E9E), and "Cancel" and "Save" buttons. The dialog shows three custom palettes, with the first one having 10 color swatches.

# Discussion

- Are there any features that you have questions about that weren't included in the topics today?



# Demo

Let Rego be your guide.



# Discussion

- What are some new features that you would like to see in the next year?



# Questions?



# Surveys

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

# Thank You For Attending Rego University

## Instructions for PMI credits

- Access your account at [pmi.org](https://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.



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