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# Beyond the Basics: Advanced Apptio BI Features and Functions

**Your Guides:**  
Eric Chan and Eric Self



# Agenda

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- Apptio BI Overview
- Data Sources
- Example Use Cases
- Key Features
- Demo Dashboard

# Introductions

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

# Quick Poll

- How many are using Apptio BI today?
- How many users are using it?
- How many reports have been created?





# Apptio BI

- Apptio BI is, in short, Apptio's self-service reporting tool. This tool is geared towards end users and empowers them to create and share their own reports.
- It allows users to create reports, insights, and action plans.

The screenshot displays the Apptio BI interface. At the top, there's a header with the Apptio BI logo and a 'New Report' button. Below the header, there's a search bar and a 'View Collection' dropdown. The main content area shows a grid of report cards, each with a title and a brief description. Below this, there's a section titled 'All Reports' with a filter bar (All, Admin, Mine, Shared, Apptio BI Reports) and a table listing reports.

Name	Owner	Created	Modified
Account Drilldown Report	MINE	4/13/22, 6:59 PM	7/28/22, 6:44 AM
Alex Smith Monthly Dashboard	MINE	4/13/22, 9:17 PM	7/28/22, 7:48 AM
Alex Smith YTD Dashboard	MINE	4/13/22, 6:43 PM	7/28/22, 9:06 AM
Apptio BI Demo Report	MINE	4/21/22, 9:38 AM	8/25/22, 8:58 AM
August Demo Report	MINE	8/25/22, 9:39 AM	8/25/22, 10:03 AM

# Helpful Links

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[Help Center for Apptio BI](#)



[Release Notes for Apptio BI](#)

# Discussion

- For anyone that's using Apptio BI in your organization today, can you share how you are leveraging it? What was your process for deploying it?
- For those that haven't started using it, what are your blockers for taking advantage of it?



# Available Data Sources

- Bill of IT
- Cloudability
- Cost Transparency
- Custom Projects
- Planning
- Vendor Insights

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## Data Source Management

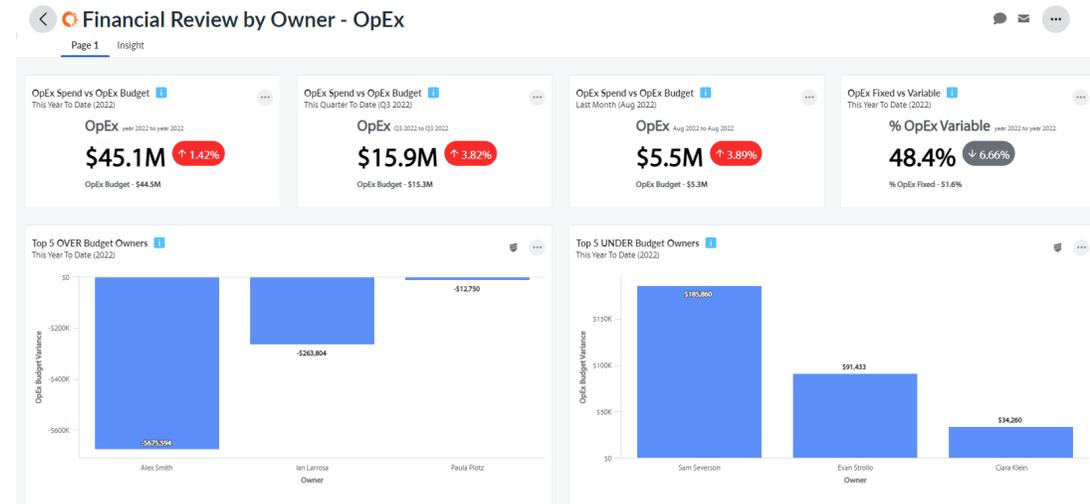
Data Source Permissions
Data Configuration

Select which data sources users can access.

Data Source	Allow Access
Bill of IT	<input checked="" type="checkbox"/>
Cloudability Cost & Usage	<input checked="" type="checkbox"/>
Cloudability Estimate	<input checked="" type="checkbox"/>
Cost Transparency (CT Demo)	<input checked="" type="checkbox"/>
Cost Transparency (Cost Transparency)	<input checked="" type="checkbox"/>
Cost Transparency (TBM4Cloud)	<input checked="" type="checkbox"/>
Cost Transparency (Vendor Insights Training)	<input checked="" type="checkbox"/>
IT Planning Asset	<input checked="" type="checkbox"/>
IT Planning Contract	<input checked="" type="checkbox"/>
IT Planning Financial	<input checked="" type="checkbox"/>
IT Planning Labor	<input checked="" type="checkbox"/>
Vendor Insights	<input checked="" type="checkbox"/>

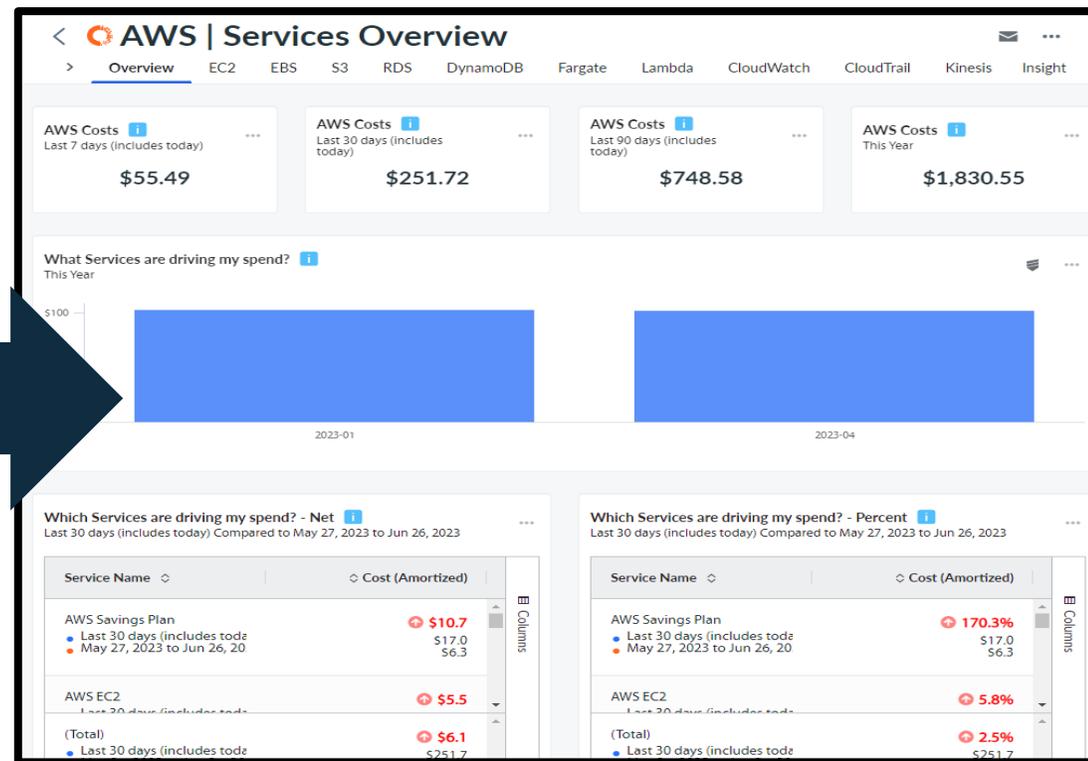
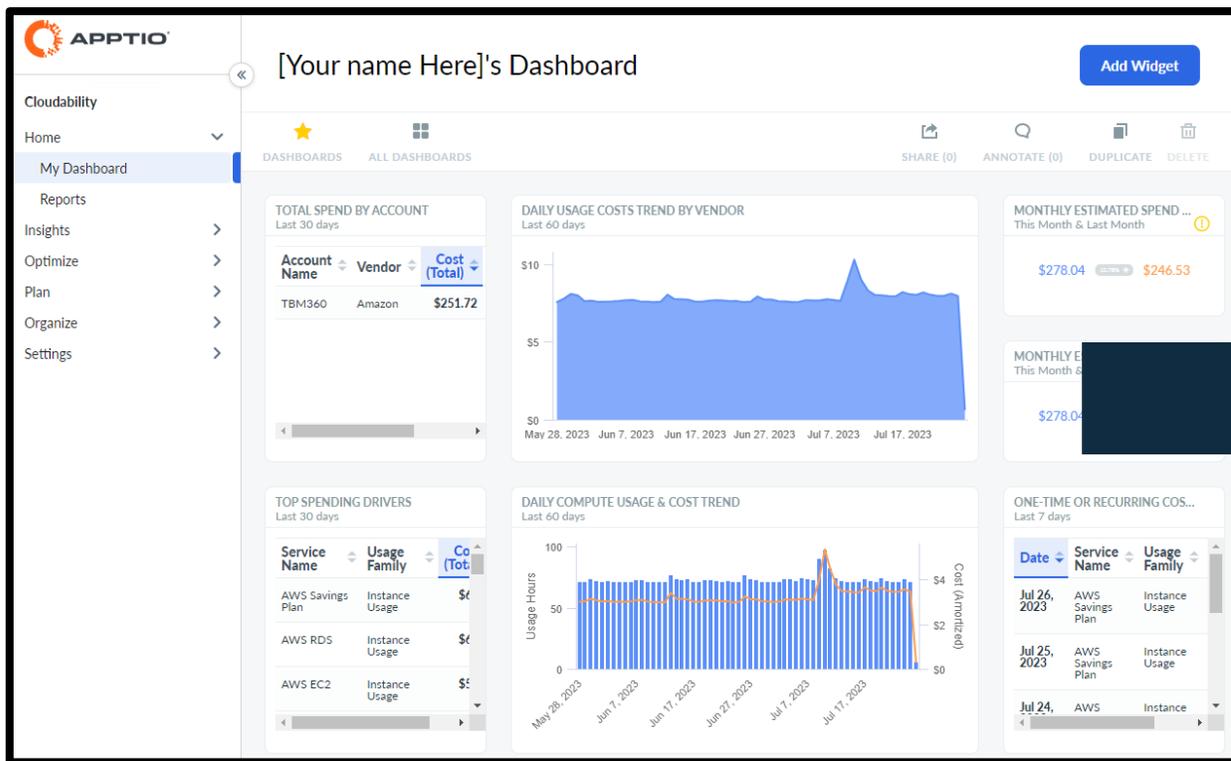
# Use Cases

- Keep users within Apptio
- Organizational Dashboards
- Personal Reporting
- Report Subscriptions and PDF
- Ad Hoc Reporting
- Row Level Security Reporting
- Insight Notifications





# Cloudability Dashboards -> Self Service Reporting -> Apptio BI





# Selecting Data Source Environment

- Able to select from Production/Stage/Branch

Edit Visualization

Data Options

All fields are required unless indicated as optional.

**Data Source and Measures**

Data Source  
Cost Transparency (CT Demo) ?

Environment Name  
Future Scenario ?

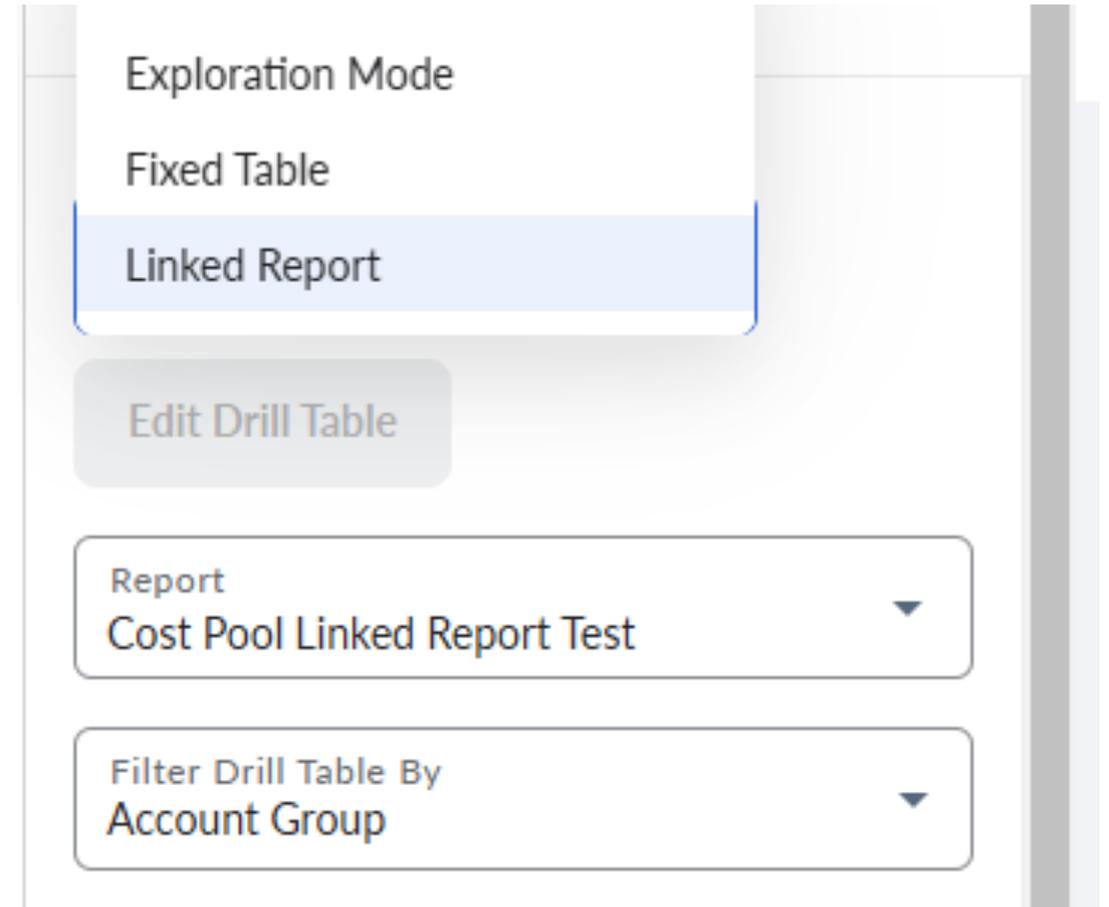
Future Scenario  
Production  
Staging

Alternative Dimensions

**Metrics**  
A metric is a measurable, quantitative value that can

# Linked Report Drilldown

- You can create relationships for drills to other reports



# Linked Report Drilldown (Continued)

Account Group, OpEx  
Jan 2023

Pivot By  
None

Account Group	OpEx
Capital Investments	\$0.00
Consulting	\$183,838.93
Contract Labor	\$324,519.31
Depreciation	\$531,791.00
Facility & Office Admin	\$173,702.27
Outside Services	\$261,226.55
Salaries & Benefits	\$981,482.00
Technology	\$1,957,146.77
Telecom	\$377,165.38

# Linked Report Drilldown (Continued)

[Account Group Linked Report Test](#) >

## < Cost Pool Linked Report Test



Filter By:

Page 1 [Insight](#) +

Cost Pool, OpEx  
Jan 2023

Pivot By  
None

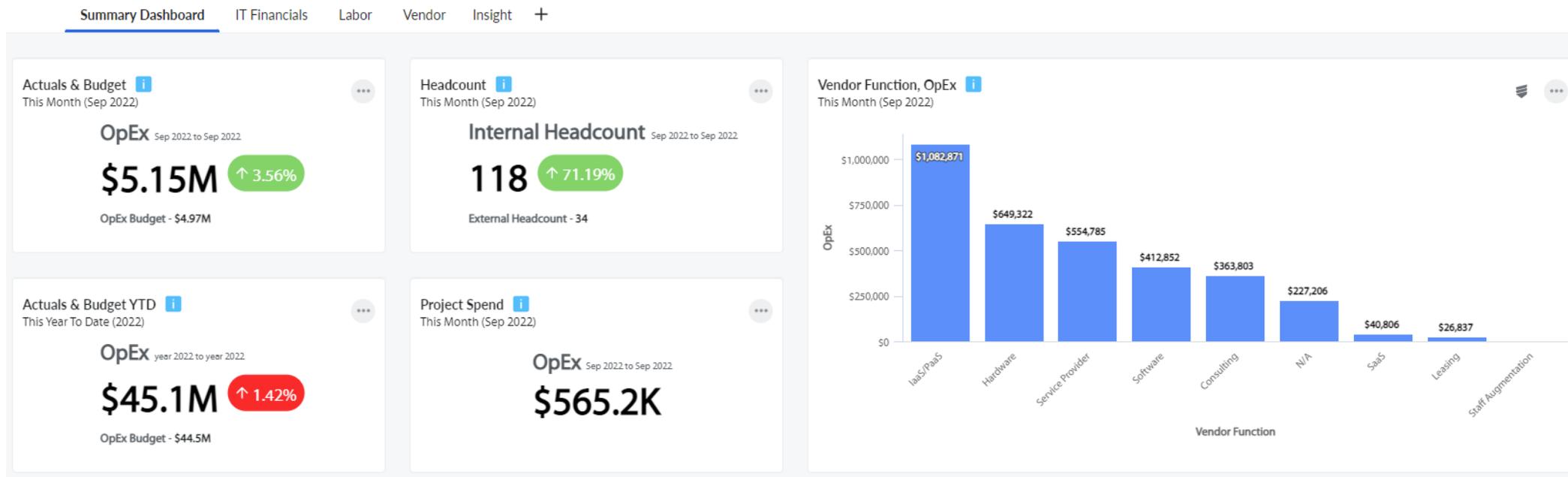
Cost Pool	Account Description	OpEx
Internal Labor	Salaries	\$537,424.58
Internal Labor	Wages	\$95,783.85
Internal Labor	Employee Benefits	\$70,131.53
Internal Labor	Bonus Incentive Plan	\$67,643.68
Internal Labor	Incentive Stock	\$62,114.84
Internal Labor	Insurance - Group Medical	\$38,140.44
Internal Labor	Overtime	\$30,672.45
Internal Labor	FUI - Federal Unemployment Insurance	\$29,108.65
Internal Labor	Vacation Accrued	\$21,008.24
Internal Labor	Serverance Pay	\$16,585.14
Internal Labor	Insurance - Dental Plan	\$12,868.58

Columns

Filters

# Leverage Pages as Report Collections

- The page feature is great in replicating similar functionality as report collections in Cost Transparency Reporting. You can create a singular filtered view and organize the visualizations.



# Dynamic Reports with Measure Picker

- Fully customizable tables similar to modifying tables in Cost Transparency with Add Columns

Account Group, OpEx i  
This Year To Date (2022)

Account Group ↓	Cost Pool ↕	Jan FY2022	Feb FY2022	Mar FY2022	Apr FY2022	May FY2022	Jun FY2022	Jul FY2022	Aug FY2022	Sep FY2022	Oct FY2022
Telecom	Telecom	\$377,165.38	\$371,708.18	\$383,109.56	\$372,115.06	\$380,597.95	\$384,929.81	\$370,119.17	\$372,859.1		
Technology	Hardware	\$502,203.72	\$250,562.83	\$389,808.78	\$328,470.60	\$253,785.40	\$257,382.56	\$473,849.53	\$255,909.0		
Technology	Telecom	\$309,035.32	\$311,359.92	\$421,774.03	\$471,860.05	\$322,823.65	\$318,145.92	\$339,273.54	\$338,025.4		
Technology	Software	\$525,622.30	\$521,609.24	\$514,817.80	\$519,149.88	\$530,014.36	\$527,911.02	\$544,514.17	\$897,533.30	\$530,332.78	
Technology	Outside Services	\$620,285.44	\$693,805.43	\$732,102.56	\$819,844.51	\$927,768.55	\$1,055,197.41	\$1,097,136.17	\$1,181,453.17	\$1,141,087.55	
Salaries & Benefits	Internal Labor	\$981,482.00	\$978,536.87	\$986,322.08	\$971,373.42	\$981,096.58	\$974,590.30	\$966,699.61	\$985,395.46	\$983,781.89	
Outside Services	Outside Services	\$261,226.55	\$272,927.11	\$250,116.10	\$228,900.17	\$252,235.66	\$240,189.36	\$239,435.89	\$213,261.73	\$226,640.55	
Facility & Office Adm	Other	\$6,433.24	\$6,407.17	\$6,711.20	\$6,443.85	\$6,568.56	\$6,567.51	\$6,697.03	\$6,682.09	\$6,758.40	
Facility & Office Adm	Internal Labor	\$197.58	\$194.71	\$199.13	\$196.90	\$198.01	\$198.68	\$197.92	\$197.98	\$193.81	
Facility & Office Adm	Facilities & Power	\$167,071.46	\$168,696.90	\$170,594.08	\$170,272.64	\$174,143.81	\$174,123.89	\$177,347.68	\$173,335.72	\$174,937.46	
(Total)		\$4,790,872.21	\$4,562,987.46	\$4,945,198.02	\$5,015,207.46	\$4,923,408.86	\$5,043,859.91	\$5,193,858.17	\$5,519,323.29	\$5,153,864.61	

**Dimensions**

Account Group

Cost Pool

Account Subgroup

Cost Center

# Discussion

- How are end users notified of what you have within Apptio?



# Report Subscriptions

- Subscriptions are a great way to keep your users in the know about specific reports available to them.

## Subscriptions ×

Use subscriptions to email content to yourself on a regular interval. You can also email an invitation for others to subscribe at the frequency you define.

What do you want to do?

[Subscribe myself](#) [Invite others to subscribe](#)

Users invited to subscribe

Eric Chan ×

Frequency  
Monthly ▾

Interval  
on day ▾ Day  
8 ▾

Send Time  
9:30am ▾

Subscription ends

Never

On a date

[Cancel](#) [Invite 1 user to subscribe](#)

# Report Collections

- Use report collections to organize reports into groups for easier access
- Reports can be assigned to multiple Report Collections

## Apptio BI

View, edit, and manage reports.

The screenshot displays the Apptio BI interface with two panels. Both panels feature a 'Reports' tab and a search bar labeled 'Search Reports'. The top panel shows a dropdown menu with options: 'Financial Org', 'Engineering Org', 'Product Org', and 'Marketing Org'. Below the search bar, there is a section titled 'Apptio BI Reports' containing several report cards. One card is titled 'Cloudability Executive View - Cl...' and another is 'ApptioOr Financial Review b...'. A 'Manage Collections' button is visible in the top right of the report area. The bottom panel shows a similar interface but with a different dropdown menu containing: 'Financial Reports', 'Labor Reports', 'Project Reports', and 'Vendor Reports'.

# Duplicate Reports

- Use the duplicate feature to save time on re-creating reports for specific users or groups

All Reports All Admin Mine Shared Apptio BI Reports

★	Name	Owner	Created	Modified	
	<input type="text"/>	<input type="text"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="mm/dd/yyyy"/>	
☆	<a href="#">Account Drilldown Report</a>	MINE	4/13/22, 6:59 PM	7/28/22, 6:44 AM	⋮
☆	<a href="#">Alex Smith Monthly Dashboard</a>	MINE	4/13/22, 9:17 PM	7/28/22, 7:48 AM	
☆	<a href="#">Alex Smith YTD Dashboard</a>	MINE	4/13/22, 6:43 PM	7/28/22, 9:06 AM	
☆	<a href="#">Apptio BI Demo Report</a>	MINE	4/21/22, 9:38 AM	8/25/22, 8:58 AM	⋮
☆	<a href="#">August Demo Report</a>	MINE	8/25/22, 9:39 AM	9/1/22, 10:18 AM	
☆	<a href="#">Copy of Apptio BI Demo Report</a>	MINE	8/25/22, 9:09 AM	8/25/22, 9:31 AM	
☆	<a href="#">Eric Testing Demo Report TBD</a>	MINE	4/21/22, 7:29 AM	8/2/22, 10:15 AM	⋮

-  Set as home report
-  Share
-  Duplicate
-  Reassign Ownership
-  Delete

# Limitations

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- Limitations on filtering data on reporting
- No time selection for Cost Transparency
- Color customization on visualizations
- Custom Formula Calculated Metrics only available in dollars
- Uses only Production data
- No API for visualizations
- Limited to data within last 12 months

# Hands on Demo



# Hands On Demo

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- *The following slides are a step-by-step guide on how to make a visualization, however, for the live demo we did not use these slides*

# Choose a Data Source

- After clicking the “Add New Visualization” button, the first step is to choose the data source for your visualization

### Add Visualization to Report

Data Options

All fields are required unless indicated as optional.

#### Data Source and Measures

- Bill of IT
- Cloudability Cost & Usage
- Cloudability Estimate
- Cost Transparency (Cost Transparency)
- Cost Transparency (CT Demo)
- Cost Transparency (ET Webinar Demo)
- Cost Transparency (Sandbox Company)
- Cost Transparency (TBM4Cloud)
- Cost Transparency (Vendor Insights Training)
- IT Planning Asset
- IT Planning Contract
- IT Planning Financial
- IT Planning Labor
- Vendor Insights

# Choose a Date Range

- Scroll to the bottom of the left-hand pane and select a date range for the visualization

**Data Options**

**Sort**

MEASURE

Ascending

Descending

**Date Range**

Select a date range, optional granularity, and comparison period.

**Currency**

Viewer's preferred currency

**Filters**

Apply a filter to constrain your data.

[+ Add Filter](#)

## Custom Date Range

Specify a fixed or rolling date range and whether this is a to-date range.

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Compare

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Rolling

< May 2023 June 2023 July 2023 >

May 2023							June 2023							July 2023						
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6					1	2	3							1
7	8	9	10	11	12	13	4	5	6	7	8	9	10	2	3	4	5	6	7	8
14	15	16	17	18	19	20	11	12	13	14	15	16	17	9	10	11	12	13	14	15
21	22	23	24	25	26	27	18	19	20	21	22	23	24	16	17	18	19	20	21	22
28	29	30	31				25	26	27	28	29	30		23	24	25	26	27	28	29
														30	31					

[Cancel](#) [Save](#)

# Choose Dimensions and Metrics

- These are the data points that you want to display in the visualization
- Dimension = Buckets
- Metric = Totals

### Dimensions

A dimension is an attribute of your data set that describes the data.

Vendor ×

+ Add Dimensions

Alternative Dimensions

### Metrics

A metric is a measurable, quantitative value that can be operated upon.

Cost (Amortized) ×

+ Add Metrics

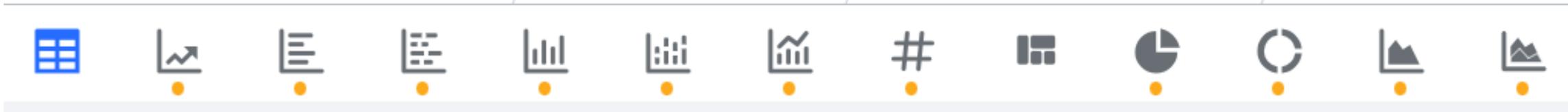
Alternative Metrics

# Set Results

- This is how many items will appear in the visualization. This is a maximum limit
- For graphs, tables, etc. make sure this number is high enough to display everything properly



# Choose a Visualization Style



Blue = Visualization Currently Selected

Yellow Dots = Available per Metrics and Dimensions Chosen

No Yellow Dot = Not Available with current choices

# Example Use Cases

# Example Use Cases

- Cloudability Total Cost
- Apptio One Reporting when there are High Calc Times
- Dashboards for Executives





# Surveys

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.



### Phone

888.813.0444



### Email

[info@regoconsulting.com](mailto:info@regoconsulting.com)



### Website

[www.regouniversity.com](http://www.regouniversity.com)



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