



Apptio IT Planning Best Practices & Latest Features

Your Guides: Eric Chan & Rob DeLeo

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

- New Features/Latest Releases
- Summary Reports Pivots and Filters
- Expenses View Options
- When to use Custom Dimensions, Lists, Attributes and Columns
- Line Item Filters (Dependent Drop Downs)
- Company Profile Options
- Q&A session

- How many of you are using IT Planning today?
- Is there anything specific you want to get out of this session?
- Any specific feature of ITP you want to dive deep on?

Part I: Latest Features



Update Actuals in a Forecast

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- In a Forecast, there is now an Option to update Actuals.
- There is an option to choose which month to update.

					Currency	y: Original 🗸 🗌 Bookmarks 🗸 🕐 🔇
D24 June Forecast V Forecast: Net	w 🌣 🗩			Department	Project All Project	Range EV2024
rial Headcount				Air Departments	AirTojetta	Open Plan
						Update Reference Data
UP BY: Department \rightarrow Name \vee COM	MPARE TO: FY2024 Budget DEMO	-75 -50 -25 -10 -5 0 5 10 25 :	50 75 ¢			Set Filters TUpdate Actuals Data
PEX TOTAL: FY2024	CAPEX TOTAL: FY2024	PROJECT TOTAL: FY2024	CHARGES TOTAL: FY2024			Compare Shortcuts
51.68IVI VARIANCE: 3%	\$12.14IN VARIANCE: 1%	\$21.86M	(\$731.26K)			Configure Variance Analysis
pend Breakdown			Spend Trend			Opuate variance Analysis
LL			All			
Please sele Spend Mar	ect a month to Update Actuals. Anagement.	Actuals data for th	e selected month will be	updated using late	st available Actu	uals from
Select M	onth					
Select M	onth					
January 2	2024					
February	2024					
March 20	124					

. May 2024

April 2024

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Custom Variance Date Range

Variance Analysis



- Full Year Variance is now available.
- Previously, could only compare months with Actuals.

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Fully Burdened Labor Costs

 Labor tab will now display the fully burdened labor costs by default.

												Currency: Origina	í∨ ∏ Bo	ookmarks 🗸 🕐 🔞	8
0	FY2024 June	Forecast 🗸	F	orecast: New	9									New View	
»	Expenses	or Labor Acti	vitv	Contracts Assets	Other				A	partment II Departments	Project All Project:	s 🔹	Range FY2024	••••	
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	Apps - Ba	ck Office	•	External	- System Engineer	-	108,000			0% 0.75	10/1/21	12/31/24		81,000	
	Apps - Ba	ck Office	•	Internal	Software Engineer	•	90,000			0% 1	1/1/21			121,950	
	Apps - Ba	ck Office	•	Internal	Manager. Back Office Applications	-	110,000			0% 1	1/1/21	12/31/24		149,050	
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	Apps - Ba	ck Office	•	Internal	· Sr. Software Engineer	-	100,000			0% 1	6/1/20	12/31/24		135,500	7
	Apps - Ba	ck Office	•	Internal	Sr Business Analyst	-	90,000			0% 1	3/1/20			121,950	
E .	Apps - Ba	ck Office	•	Internal	Sr. Software Engineer	•	100,000			0% 1	1/1/21	12/31/24		135,500	-
Ľ*	TOTAL						15,388,000			146				19,243,300	

Fully Burdened Labor Costs (cont.)

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Bons Interview PlanePercent of Base RateImage: Constraint of B	t Out	utput Value Type	Exclude From Labor Calculation	Currency	Value	Labor Amortization Method	Advanced Rules
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Other Admin Support • Percent of Base Rate • USD 0.02% Straight Line Even Period • Advanced Rates (1) Overtime • Percent of Base Rate • • ISD 3% Straight Line Even Period • Advanced Rates (1)	e - Group Medical • Perce	rcent of Base Rate -		USD	3.95%	Straight Line Even Period -	Advanced Rates (1)
Overtime - Perrent of Base Rate - DISD 36 Strainht Line Even Period - Advanced Rates (1)	dmin Support • Perce	rcent of Base Rate -		USD	0.02%	Straight Line Even Period -	Advanced Rates (1)
	e • Percr	rcent of Base Rate -		USD	3%	Straight Line Even Period -	Advanced Rates (1)
Salaries Percent of Base Rate USD 100% Straight Line Even Period Advanced Rates (1)	- Percr	rcent of Base Rate -		USD	100%	Straight Line Even Period -	Advanced Rates (1)
Severance Pay Percent of Base Rate USD 1.7% Straight Line Even Period Advanced Rates (1)	se Pay - Perce	rcent of Base Rate 🔹		USD	1.7%	Straight Line Even Period 🔹	Advanced Rates (1)

 Column in Labor Allocation Rules table controls if rule is included in FY total on Labor Tab.

Variable Contract Extension

<u>Variable Contract</u>
 <u>Extension – Help</u>
 <u>Section</u>

- Must be in the "New" Expenses View.
- Click on the Extend column.

											Currenc	y: Original ৲	✓ □ Bookmarks ✓	() (Þ
2024 Jun	e Forecast 🗸 🗸 Forecast: N	New 🔅 🗩											1	New View
opense	es							Department All Department	s 🔻	All Project	ts	•	Range FY24 - FY25	•
imary La	abor Labor Activity Contr	racts Assets Other												
~ C/	Contract \$2.88M	Extension \$1.11M												
	■ m ▼ 田 •													<i>ہ</i> ر
-	Project	Cost Type	Vendor	PO Number	Contract ID	Description	Amo	Start Date	End Date	Dura	Extend	Amor	Extension Settings	E.
		✓ Run	✓ Dell Systems	~	~	~	1,200,000	7/1/23	6/30/24	12.00	\checkmark		Extend	
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	Boston LAN Tech Refresh Regulatory Compliance Ph 4 Troux Implementation	 Run Run Run 	 Oracle IBM Services Amazon Web Services, Inc. 	 594706 582294 603386 	 C794 C787 C790 	 Oracle - ERP License App Support for Oracle CRM Ja S3 dev workloads 	100,000 . 150,000 120,000	1/1/24 1/1/23 11/1/24	6/30/25 3/30/24 12/1/25	18.00 15.00 14.00			Extend Extend Extend	E Columns
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Disable Compounding

Extend Until* ______ 12/31/2025 Apply

Extension Start Date	Extension End Date	Adjustment Comments
07/01/2025	12/28/2025	10%
12/29/2025	06/27/2026	0%

Extension Adjustmen % 10

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 New option to Sync Layouts from Legacy view.



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Currency: Original 🗸 🛛 🗍 Bookmarks 🗸 🧑 🖉

- Open/Finalize Plan
- Update Reference Data
- Import Line Items



• Bulk Delete Lines



Delete Ledger Line Items? Count: 7

You are about to delete 7 Ledger line items. You will not be able to recover this line and its financials once it is deleted.

Please type the word "DELETE" below to confirm delete.

CONFIRMATION *

Cancel

Delete

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• "All" subtab for Labor and Assets

										Cu	rrency: Original	∨ ∏ Boo	kmarks 🗸 🔇) @ 2
C	FY2024 June	Forecast V Fore	cast: New 🔅 🗩										N	ew View 💽
»	Expenses	S	Contracts Assets Other					Department All Departments	•	Project All Projects	•	Range FY24 - FY25		ר ב
	✓ Tot	tal 160.58	Existing 146	Planned	14.58							All	Existing PI	anned
		Existing Labor	Cost Center	Project	Cost Type	Project Labor Role	Project A	Portfolio	Spend Ca	. Resource	Business	Vendor S	. Working	Ca
			Apps - Back Office	✓ San Francisco LAN	Tech R 🗸 Run	✓ Contract - PM	✓ Continue	~	✓ Projects	✓ Resources Y	 Business 	✓ Other	✓ Default (- .
			Network Services	~	✓ Run	✓ Contract - Dev	✓ Continue	~	✓ BAU	✓ Resources Y	 Mission C 	✓ Other	✓ Default (Colu
			Apps - Back Office	~	✓ Run	✓ Contract - Dev	✓ Continue	~	✓ Projects	✓ Resources Y	 Business 	✓ Other	✓ Default (sum
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			Apps - Back Office	✓ Madrid Data Center	Cons 🗸 Run	✓ Dev	✓ Continue	~	✓ BAU	✓ Resources Y	✓ User Prod	~	✓ Default (
			Apps - Back Office	✓ Workday Fin/HR Re	place 🗸 Run	✓ PM	✓ Continue	~	✓ Projects	✓ Resources Y	 Business 	~	✓ Default (TI V
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			Apps - Back Office	➤ Boston Data Center	Conso 🖌 Run	✓ Dev	✓ Continue	~	➤ BAU	✓ Resources	 Mission C 	~	✓ Default (

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• Forecast and Plan Total columns available

										Currency: Origina	al 🗸 🗌 Bookmarks 🗸 🕐	@ _		
C	FY2024 June Forecast V	ecast: New 🔅 🗩)								New	View 💽		
»	Expenses							All Department	nents 🔻	Project All Projects	Range FY24 - FY25	··· 🛛		
	Summary Labor Labor Activity	Contracts Assets	Other											
		••										и ^л	Search Account: Cost Sub-Pool	٦
	🔚 📖 Cost Object 🛽 🛽												Account: Cost Pool	Ш
	Cost Object	Cost Object ↑	Cost Center	Account	FY24 < YTD FY24	Forecast Total FY24	FY24	FY25	Plan Total	Group By			Account: Account Category Name Account: Expense Type Account: Code	Sumily
	> Apps - Back Office	Apps - Back Office	Apps - Back Office	29 unique	3,016,109	3,205,350	6,221,458	5,829,060	12,050,518	🛉 🗹 Year			Vendor Vendor: User Interaction	
	> Apps - Line of Business	Apps - Line of Busine	Apps - Line of Business	26 unique	1,940,402	3,801,212	5,741,614	4,815,088	10,556,702	Quarter(s)		Colu	Vendor: Service Location	_
	> Apps - Sales & Ops	Apps - Sales & Ops	Apps - Sales & Ops	28 unique	2,647,314	4,474,373	7,121,687	7,508,879	14,630,566	Quarter(s)		mns	Vendor: Function	7
	> Collaboration & Communi	Collaboration & Com.	CC for Collaboration & Comm	. 26 unique	227,081	1,819,871	2,046,953	1,779,467	3,826,419	Month(s)			Vendor: Location	Tilters
	> Data Center Ops	Data Center Ops	Data Center Ops	29 unique	1,481,539	3,745,025	5,226,564	6,235,474	11,462,039	VTD			Vendor: Code	
	> Enterprise Compute & Sto	Enterprise Compute .	2 unique	32 unique	4,940,683	5,368,389	10,309,071	8,988,249	19,297,321	Forecast Total		₹ T	Vendor: Type	
	> Field Support - NA	Field Support - NA	Field Support - NA	27 unique	1,423,224	3,106,107	4,529,332	6,441,066	10,970,398			Iters		=
	> Finance Initiatives	Finance Initiatives	Finance Projects	2 unique	0	0	0	0	0			- 11	Location: Region	ر بر
	> Mfg & Distribution Initiati	Mfg & Distribution I	. Mfg Projects	2 unique	0	372,346	372,346	746,026	1,118,371				IT Strategy	ning
	> Network Services	Network Services	Network Services	31 unique	817,354	2,255,439	3,072,792	3,714,633	6,787,425			=	Spend Type	
	> Office of the CIO	Office of the CIO	2 unique	22 unique	991,988	1,440,531	2,432,519	2,281,837	4,714,357			roupi	Contract ID	
	> Operations Center	Operations Center	Operations Center	25 unique	531,727	1,403,031	1,934,757	1,952,278	3,887,035			gn	Line Item Type	
	> Program Office	Program Office	Program Office	22 unique	1,188,459	679,373	1,867,832	1,164,590	3,032,422				Business Initiative	
	> Sales & Marketing Initiativ	Sales & Marketing Ini	Sales & Marketing Projects	2 unique	0	109,200	109,200	738,324	847,524				External	
	> Security & Risk Mgmt	Security & Risk Mgmt	Security & Risk Mgmt	28 unique	6,462,720	1,290,504	7,753,224	2,158,368	9,911,592				Comment	
	> Service Desk	Service Desk	2 unique	24 unique	572,457	1,445,577	2,018,034	2,422,203	4,440,237				Plan Total	
Ð	- Tochnology Initiatives	Tochnolomy Initiativos	Internal Initiatives	Contract Toch Jahor	0 26,693,848	0 37,127,961	63,821,809	0 60,598,517	0 124,420,326					

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regoUniversity2025

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P5P 6

Automated Data Management Updates

• Import Line Iteam Data from Specific Period.

() >	TEST ADM V Budget: New	\$	Import From Apptio Costing
	Summary Labor Contracts	Other	Import type: Replace All Data Update Data Select this option to replace any existing data in this table.
	∽ OpEx \$0	CapEx \$0	Select Apptio Costing Period Feb FY25
		Table Level Actions	Vear FY2025 Cancel Import
	Line Item Code	Disable dense mode 🗊 🔵 nter Import external financials	Jan Feb Mar
		Import financials	Apr May Jun
		Export financials	Jul Aug Sep
		Delete all external financials	Oct Nov Dec
		Export financials template Adjust amounts	

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Automated Data Management Updates

• Schedule Publish of Plan Data.

Add Schedule			Add Schedule		
Fill Information	Step 1/2		Fill Information	Step 2/2	
Producer* ApptioOne Planning	Ţ		Schedule Type Daily Weekly Monthly 		
Entity Configuration			Start Date 02/25/2025	End Date 02/28/2025	
Schedule Name* Planning Test			No End Date		
Plan Name* TEST ADM	•		Select Time* 5:00AM	Time Zone Universal Time (UTC)	
Entities* Contract Budget, Labor Budget, Financial Budget	•				
Select CT Period Preset* Start of FY	•				
		Cancel Next	Cancel		Previous Create Schedule

Let Rego be your guide.



Full automation of the IT Planning / Cost Transparency Data Exchange Process



Customize what is transferred and where, including custom use cases

Schedule

Schedule the data sync between ITP and CT, running it as often as you like

Save Time

Eliminate manual processes, ITP extracts, and data loading



Part II: Best Practices



Summary Reports

- 1. KPI Settings
- 2. Adjust Date Range
- 3. Change Variance
- 4. Adjust Filters
- 5. Adjust View
- 6. Drill into Hierarchy
- 7. Break out by Dimension



Summary Reports – Waterfall Chart

- 1. Drill into grouping
- 2. Variance Detail Popup



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Expenses View

- 1. KPI Settings and Comments
- 2. Setup Compare Shortcuts
- 3. Bookmark Pages
- 4. Create Layouts
- 5. Adjust Filters

V202	3 Rudget													C	,
Expe	ENSES	ts Other	,						Section Departments	•	All Dep	nt	▼ Range FY2023		2
орі \$	EX TOTAL: FY2023 39.25M TARGE	T: \$49.37M NCE: -20%	CAPEX TOTAL: FY2023 \$0 TARGET: \$3.46M VARIANCE: -100%			ß						Z Sh	now Delegated Costs	5 ALL C	OP
Layou	at - 4												Expense Delegation		
0	Cost Center 1	Description	† Test	Cost Center: IT	Account	Account: Cost Pool	Account: Expense	Vendor	Loc	ation C	Comment	Currency	From Project Cost Center	Jan FY2	23
•	Apps - Back Office	37 unique		Alex Smith	23 unique	5 unique	OpEx	12 unique	4 ui	nique		USD	4 unique	350,14	42
•	Apps - Line of Business	46 unique		Alex Smith	21 unique	4 unique	OpEx	12 unique	5 ui	nique		USD	4 unique	625,33	
+	Apps - Sales & Ops	44 unique		Alex Smith	23 unique	5 unique	2 unique	11 unique	3 ui	nique		USD	3 unique	431,34	49
•	CC for Collaboration & Comm	5 unique		Evan Strollo	14 unique	3 unique	OpEx	4 unique	3 ui	nique		USD		44,24	43
•	Data Center Ops	25 unique		lan Larrosa	22 unique	6 unique	ОрЕх	6 unique	4 ui	nique		USD	3 unique	169,68	
•	Enterprise Compute & Storag	28 unique		lan Larrosa	20 unique	3 unique	ОрЕх	6 unique	4 ui	nique		USD	3 unique	220,67	70
•	Field Supprt - NA	10 unique		Evan Strollo	15 unique	3 unique	OpEx	4 unique	5 u	nique		USD		131,51	13
+	Network Services	19 unique		lan Larrosa	20 unique	4 unique	OpEx	4 unique	3 ui	nique		USD	2 unique	129,42	24
+	Office of the CIO	30 unique		Ciara Klein	20 unique	3 unique	OpEx	7 unique	2 ui	nique		USD	3 unique	264,90	
•	Operations Center	21 unique		lan Larrosa	19 unique	4 unique	OpEx	6 unique	6 ui	nique		USD		654,72	29
•	Program Office	16 unique		Paula Plotz	17 unique	2 unique	OpEx	2 unique	5 ui	nique		USD		71,87	74
•	Security & Risk Mgmt	23 unique		Sam Severson	19 unique	4 unique	OpEx	5 unique	3 u	nique		USD	2 unique	134,61	
•	Service Desk	18 unique		Evan Strollo	18 unique	3 unique	OpEx	3 unique	3 ui	nique		USD		77,20	D1
	Voice and Call Center	15 unique		lan Larrosa	17 unique	2 unique	OpEx	3 unique	4 ui	nique		USD		45,98	84

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Expenses View

- Import External Financials vs Import Financials
- 2. Adjust Amounts

penses							Section	•	Department All Departments	Range FY2023		•
mary Labor Contracts	Assets Other						Departmento		An Departments			
OPEX TOTAL: FY2023	CAPEX TOTAL: FY202	3							Show [Delegated Costs	Set Filters T	
\$2.37IVI	\$0								Expense Delegation	0	Import External Import Financia	l Fina als
Cost Object 1 Te	est Cost	Cost Center	Account	Account: Expense	Vendor	Description	Comment	Currency	From Project Cost Center	Jan FY23	Export Financial	ils mal Fi
Apps - Back Office	Alex Smith	Apps - Back Office	7 unique	OpEx		14 unique		USD	3 unique	33,969	Export Financial	als Ter
Apps - Line of Busir	Alex Smith	Apps - Line of Business	7 unique	OpEx	2 unique	12 unique		USD	3 unique	39,052	Adjust Amounts	s
Apps - Sales & Ops	Alex Smith	Apps - Sales & Ops	8 unique	2 unique		15 unique		USD	3 unique	7,111	7,024	
Data Center Ops	lan Larrosa	Data Center Ops	6 unique	OpEx		11 unique		USD		4,842	4,870	
Enterprise Compute	lan Larrosa	Enterprise Compute & Storage	5 unique	OpEx		6 unique		USD		2,473	2,483	
Network Services	lan Larrosa	Network Services	6 unique	OpEx		11 unique		USD		10,813	10,899	
Office of the CIO	Ciara Klein	Office of the CIO	7 unique	OpEx		13 unique		USD		18,046	18,154	
Operations Center	lan Larrosa	Operations Center	7 unique	OpEx		12 unique		USD		43,459	42,862	
Program Office	Paula Plotz	Program Office	6 unique	OpEx		11 unique		USD		5,090	5,139	
 Security & Risk Mgr 	Sam Severson	Security & Risk Mgmt	6 unique	OpEx		11 unique		USD		11,349	11,413	
Service Desk	Evan Strollo	Service Desk	6 unique	OpEx		11 unique		USD		8,825	8,878	
	lan Larraça	Voice and Call Center	6 unique	OpEx		11 unique		USD		12,210	12,427	

Adjust Amounts

- 1. Make Adjustments in a New status
- 2. Only available on Other tab

<u>Help Section on Adjustment</u> <u>Amounts</u>

Adjust Amounts			×
Adjustment Type Percentage Adjustment Amount		 Absolute 	
0%			Enter a positive or negative number
Apply To			
Choose Cost Obje	2t	•	Select a set of line items to adjust
Choose Account		•	
Period Range			
From	January -	FY2023 •	Specify a start and end period
Through	January -	FY2023 •	
			Adjust Cancel

Customizations

- 1. Custom Dimensions
- 2. Custom Lists
- 3. Custom Columns
- 4. Custom Attributes

Help Section on Custom Dimensions and Lists

Custom Dimension

 Configuration > Schema > Custom Dimension > Add

Configuration - Schema	< +	v - 0	×
\leftrightarrow \rightarrow C $($ app.apptio.com	n/itp#configuration/schemaLayout/tab=customDimensions	요 ☆ 영 悔 🖨 🖪 📵	
		0 @ .	8
	Configuration Schema		
IT Planning	Une Items Standard Dimensions Custom Dimensions Project		
Planning > Spend Management > Change History >	Custom Dimensions	1 +	
Configuration V Reference Data	Dimensions		
Schema	Test	Show	
Custom Lists Line Item Filters Line Item Code Prefix Cost Object Permissions Labor Allocation Rules Score Calendar Setup		Hide Columns	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
Signed in as: Rob DeLeo	4	*	

Custom List

 Configuration > Custom List > Add (Need to add at least one value, then can import a csv)

Configuration → Custom Lists	× +	v - 0)
\leftrightarrow \rightarrow C $ ightarrow$ app.apptio.	.com/itp#configuration/customLists/section=all-plan-sections	🖻 🖈 🖷 🕫
		0 @ 2
	Configuration Custom Lists	
T Planning Planning Spend Management	Custom Lists	
Change History	Name	Count of Values m
Reference Data	Benefit Category	6 Show/
Schema	Business Initiative	5 Hide O
Custom Lists	Business Sponsor	8
Line Item Filters	Department Owner	5
Cost Object Permissions	IT Project Owner	12
Labor Allocation Rules	Invest Type	3
Score	New Portfolio	3
Calendar Setup	PF - Funding Source	4
	Priority	4
	Project Lifecycle	8
	Project Portfolio	6
	Proposal Status	4
	Risk	4
	Spend Type	3
	Sponsor Business Unit	9
Signed in as:	5 I I I I I I I I I I I I I I I I I I I	

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Custom Attributes & Columns

- 1. Configuration > Schema
 - 1. Add Column
 - 2. List is Custom List
 - 3. Lookup is Custom Dimension

Configuration → Edit Schema >	< +		
$\leftarrow \rightarrow C$ (a app.apptio.com	n/itp#configuration/editSchema/lineItemName=F	nancialLineItem/tab=lineItems	🖻 🖈 🗅 📵 🗄
			2 Ø Ø
	Configuration Schema		
IT Planning > Planning > Spend Management > Change History >	Financial Line Item Configure what attributes define I Available Attributes	nancial Line Item.	
Configuration Reference Data Schema	Search by Name	Add Custom Attribute	
Custom Lists Line Item Filters	Account	Field Name*	
Line Item Code Prefix Cost Object Permissions	Amount	Money Data Type* X A	
Labor Allocation Rules Score	Comment	Memo Please fill out this field.	
Calendar Setup	Cost Center	Date Integer	
	Cost Object	Number Percentage	
	Created Da	e Time Memo	
	Currency	Lookup User Backara	
	Description	Memo 3 Lookup	
	External	oolean	
Signed in as: Rob DeLeo	Line Itom Code	interior -	

Line Item Filters (Dependent Drop Downs)

- Configuration > Line Item Filters
 - 1. Add Line Item Filter
 - 2. Choose Dimension to filter
 - Then filter down by Dimension or List

Configuration → Line Item Filters	4 +	~ - 0 X
← → C ⓐ app.apptio.com	/itp#configuration/lineItemFilters/section=all-plan-sections	순 🏚 👒 🖕 🖨 📵 🗄
		0 @ L
	Configuration	
IT Planning > Planning > Spend Management >	Line Item Filters	0 + -
Change History > Configuration >	Name Column Filter By	
Reference Data Schema Custom Lists Line Item Filters Line Item Code Prefix Cost Object Permissions Labor Allocation Rules Score Calendar Setup	Add Line Item Filter Name* Column* Column* Account Asset Class Contract Type Location Role	ov/Hde Columns
Signed in as: Rob DeLeo	Test Vendor	,

Company Profile

- 1. Gear Icon > Company Profile
 - 1. General Features
 - 2. Upgrade Schedule

C app.apptio.com	m/itp#admin/company			
				0 (
Company Profile				Reset Changes Exit Without Saving Save a
Settings				
	Fiscal Calendar	January - December	-	
	Currency	US Dollar (USD)	•	
G		Enable Multi Currency Show ISO Currency Codes instead of Symbols		
	General	Enforce View Permissions Send Email Notifications for Planning Process Even Enable Dashboard and Variance Drivers Disable Base Compensation Warning Disable Care Cett Deliver View Driverit	ts	
		Disable Update Reference Data Restrictions Checking this will allow Reference Data changes that could p will create a copy of the plan before Update Reference Data. 1	ttentially delete plan data. As a result, the system 'hese plan copies will have a "Backup" suffix.	
	2 Upgrade Day	Thursday This is the day you are currently scheduled to receive product product upgrades and system maintenance schedule page.	- upgrades. For more information, see the	
Enable Capabilities				
IT Planning Foundation		☑ Labor Headcount		
		Headcount Summarization Method	Average	•
		Default Labor Start Date	Start date of Fiscal Year	•

Company Profile continued

- 1. Gear Icon > Company Profile
 - 1. Labor Tab
 - 2. Group Labor Financials
 - 3. Contract Tab
 - 4. Asset Tab
 - 5. Group Actuals in Forecast

C 🔒 app.apptio.com/itp#adn					년 ☆ 영 🍊 🗯 🔲 (
					0 @
Company Profile				Reset Chan	iges Exit Without Saving Save and
	Uisable Update Reference Data Restrictions Checking this will allow Reference Data changes that could will create a copy of the plan before Update Reference Data	potentially delete plan data. As a result, the system These plan copies will have a "Backup" suffix.			
L	Jpgrade Day Thursday	-			
	This is the day you are currently scheduled to receive produ product upgrades and system maintenance schedule page.	ct upgrades. For more information, see the		\searrow	
Enable Capabilities					
IT Planning Foundation	1 Z Labor Headcount				
	Headcount Summarization Method	Average	•		
	Default Labor Start Date	Start date of Fiscal Year	•		
	2 Zabor Summarization	Summary Options			
		Account	Comment		
		Cost Center	Cost Object		
		Description	Location		
		Test	Vendor		
	Enable Streamlined Labor Planning Experience				
	Contracts	Auto-Update Contract Total			
	 Include Value-Added Tax (VAT) 				
	4 🗹 Assets				
	5 Summarize financial actuals down to the following dimensions and/or attributes	Dimensions and Attributes			
	•	Cost Center	Vendor		
		Project	Location		
		Test	Cost Object		
		Score	Role		
		Account	Description		

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Questions?





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



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Thank You For Attending Rego University

Instructions for PMI credits

- Access your account at 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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Email info@regoconsulting.com



Website www.regouniversity.com

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