Orlando 2025

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Apptio • Targetprocess • Cloudability

Apptio Reporting Excellence: Strategies for Engaging Stakeholders

Your Guides:

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Introductions

- Take 5 Minutes

- Turn to a Person Near You

- Introduce Yourself

- Business Cards

Agenda

- Introduction

- Reporting Options for Apptio

- Reporting Tips & Tricks

- Reporting best practices
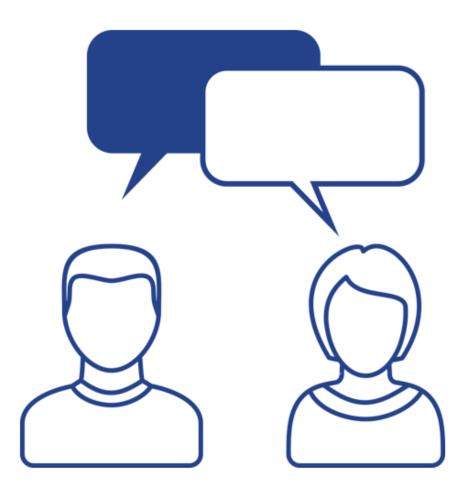
- Custom Report Showcase

Reporting:
Know Your Audience

Engagement

1. Do you know who your stakeholders are?

2. Do you know what your stakeholders want?

Stakeholder	Suggestions
Executives	Charts, KPIs, Simplicity
Finance	Tables, Trending, Variance Identification
Management	KPIs, Immediate Answers, Minimal Interaction
Analyst	Filters, Optional Columns, Drills

Discussion

- Consider the reports you currently deliver:
  - o Any reports targeted for executives?
  - o Are effective and why?
  - o Reports for: Finance? Management? Analyst?
- Did you have the audience in mind building report?
- Which report features do you feel are the most effective and why?

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Apptio Reporting Options

Apptio Reporting Options

Out of the Box Report

- ITP/PFP Dashboard vs CT Report
- ITP / PFP reports/dashboards
- Design cannot be customized
- BVA, plan comparison reports
- User-specific changes – group by, filters, comparisons, etc

Custom Studio Report

- Created from scratch or modified OOTB
- Data available from CT application (i.e. TBM Studio)
- Requires admin privileges to build
- Allows more advanced formatting and reporting capabilities
- Report access can be configured as well
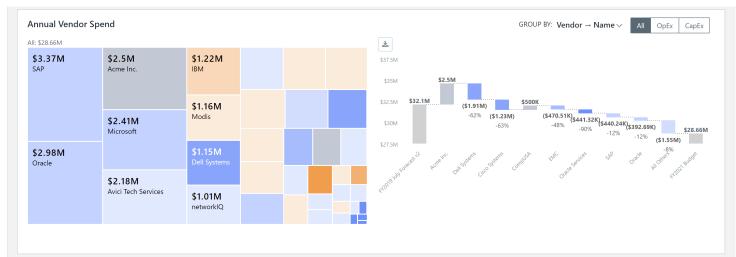- Requires calculation and promotion to production environment

Self-Service Report

- TBMAs and End Users can build reports
- Reports can be personal or shared with selected users and user categories
- Data content available for these reports are configured by Admins
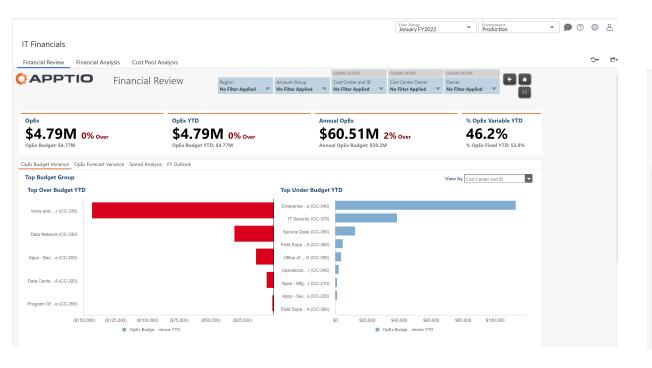- Data available from ITP, CT, Cloudability applications
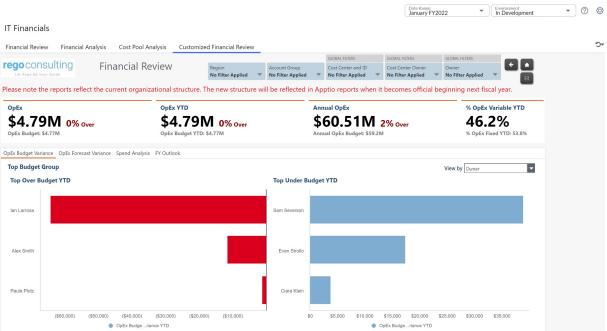
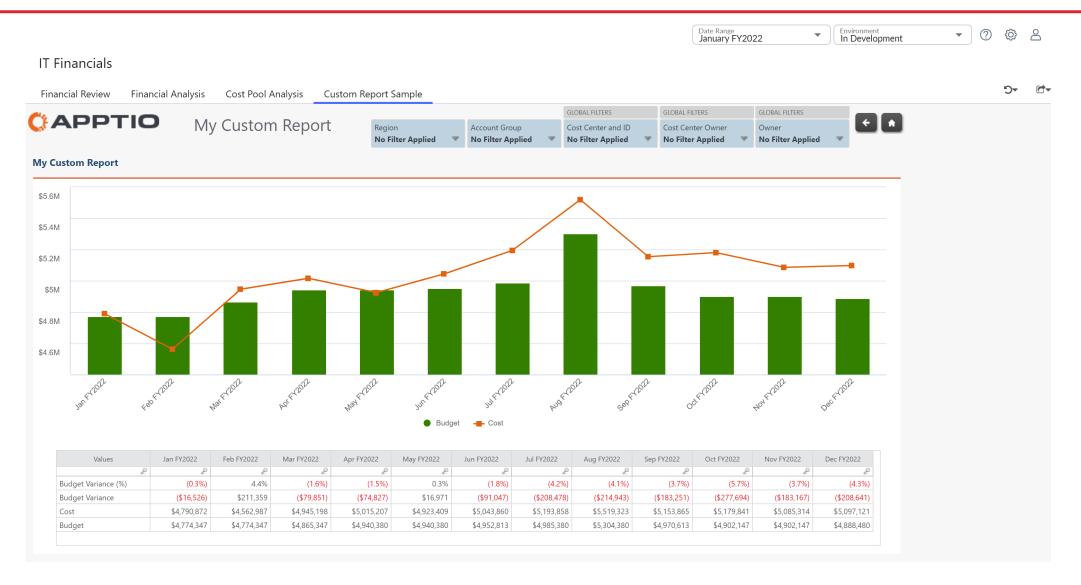# OOTB Report Example – ITP Dashboard

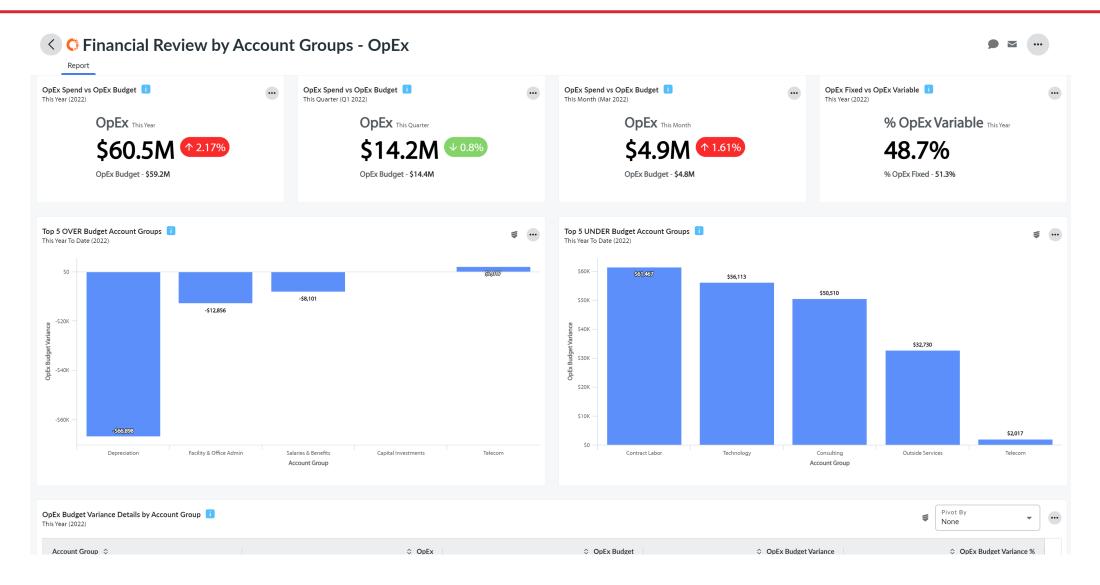# Customizable OOTB Report Example – Cost Transparency

Custom Report Example – Cost Transparency

Self Service Report – Apptio BI

External BI Tools

- Many organizations have an enterprise BI tool within their reporting landscape, and it is important to establish how Apptio fits into the reporting solution.

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Send your stakeholders the relevant information they want from Apptio using tailored **email** templates
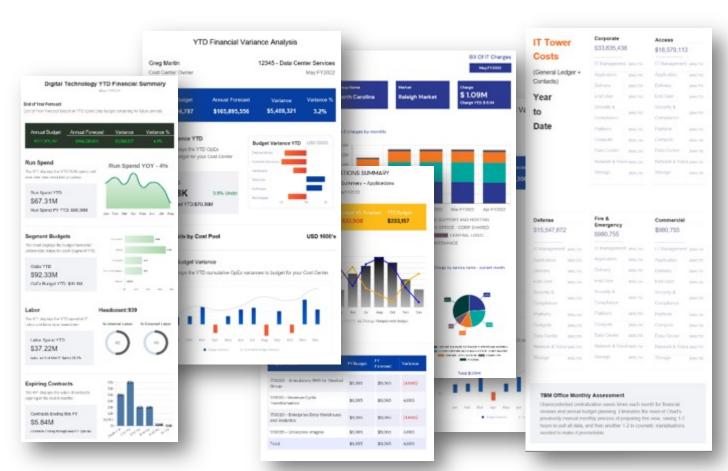
Step 1

Create a new report, or choose one from our library of templates to tailor

Step 2

Select groups of users to receive emails with data based on their roles

Step 3

Schedule reports for recurring and automated email delivery
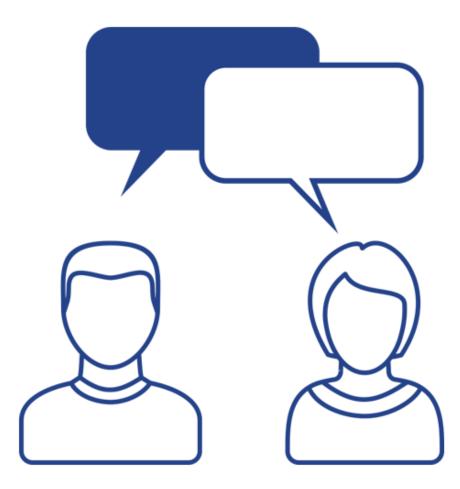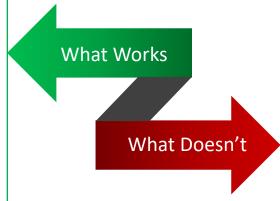
Reporting Strategy Best Practices

Discussion

- What is your primary reporting mechanism? (Out of the Box, Studio Reports, Self-Service Reporting)

- How do executives want to consume reports? (Web, Email, Mobile)

- Are there other reporting options you should consider?

Best Practices

- With any report, identify the top question(s) that the report should answer

- Use the right report technology for the job (Studio, Self-Service, Enterprise, etc..)

- Converting excel reports that are already operationalized and moving them into the tool can gain big benefits

- Automation of report delivery

- Having leadership adopt the tool and utilize the tool's dashboards (eventually moving away from "receiving" dashboards to "using" dashboards)

- Ensure that the reports are designed for 'Easy Reading'

- Ensure the definition of data is uniform for all reports

What Works

What Doesn't

- Having people go into the tool to pull out extracts and fish for the data

- Developing reports that have too many data columns, which can cause the report to lose its purpose

- Having scenarios where the user is taking a report from the system, copying and pasting parts of it into a ppt/excel, and generating another report outside of the tool

- Creating different versions of the same report for different business units. This should be handled with thoughtful filters

- Creating reports with data that is inconsistent with other systems, and not having a clear understanding of ownership of data

Reporting Tips & Tricks

Reporting Tips & Tricks (LIVE DEMO)

1. Use Value Field Settings to easily add comparison columns for a metric

2. Swap a chart view between table and chart

3. Color Palette Tricks
   1. Using generic 1, 2, 3 for chart color palette
   2. Use generic text references such as Biggest=Blank; Second=GREEN

4. Use the "Context Menu" option to enable a quick export button for a report table

5. Export a report table by right clicking on the scroll bar (since export toolbar button always exports all tables/tabs on a report)

Reporting Tips & Tricks (LIVE DEMO)

1. Use Conditional Formatting

2. Create Master Report Templates

3. Components and features you may not use often and what they do:
   a. Pivot Component
   b. Show data as Tree
   c. Others?

4. What visualization is best for your data?
   a. Pie Chart, Column Chart, Table, KPI, Trend

5. Add HTML boxes
   a. As of Dates
   b. Embedding links to training videos stored internally

Custom Report Examples

Discussion

- Have you use custom reports in your organization?

- Do you have any you're willing to share?

Questions?

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

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- Class Name = **regoUniversity**
- Course **Description**
- Date Started = **Today's Date**
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